













EDM User Guide – Bulk Upload

Bulk upload allows you to submit multiple member records at one time.


Bulk upload files must be in CSV format. CSV templates for all forms are available on the EDM home page.


Upload Employer Data


Upload Data


Type of Form	Manual Entry	Bulk Upload
Starter		
Leaver		
Annual Return		
Service Change		
Misc Update		
Amendment		


Download CSV Template


 Starter

 Leaver

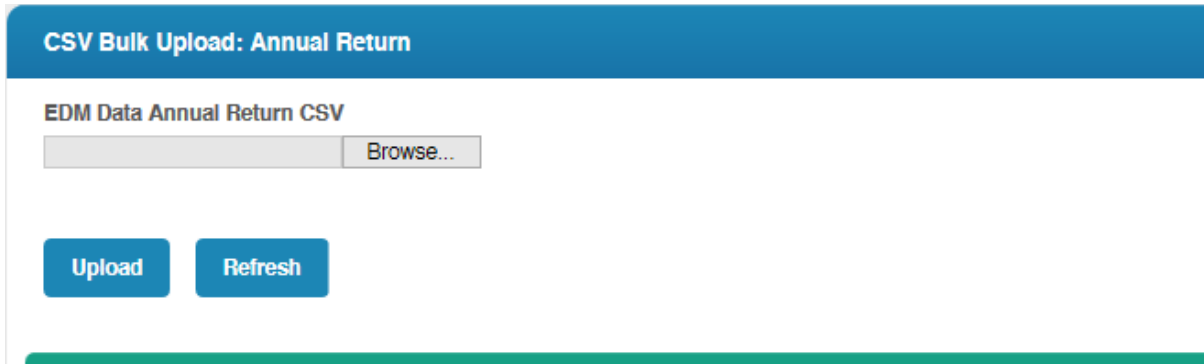
 Annual Return

 Service Change

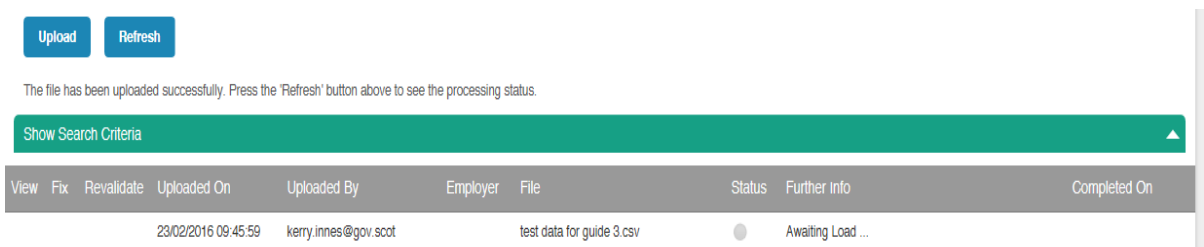
 Misc Update

 Amendment

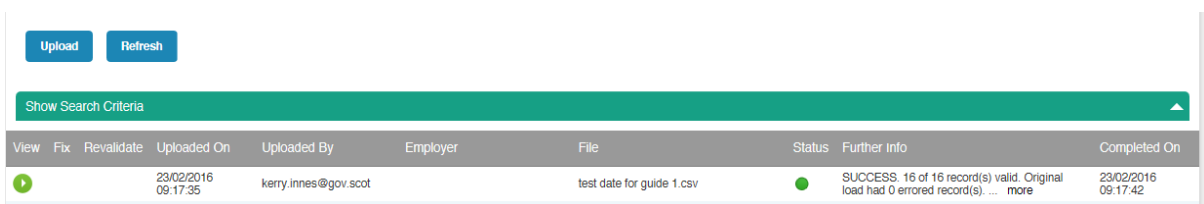
When you click on a bulk entry form in the home screen you will see the following screen:



Browse to select the file you want to send and then click 'Upload'.




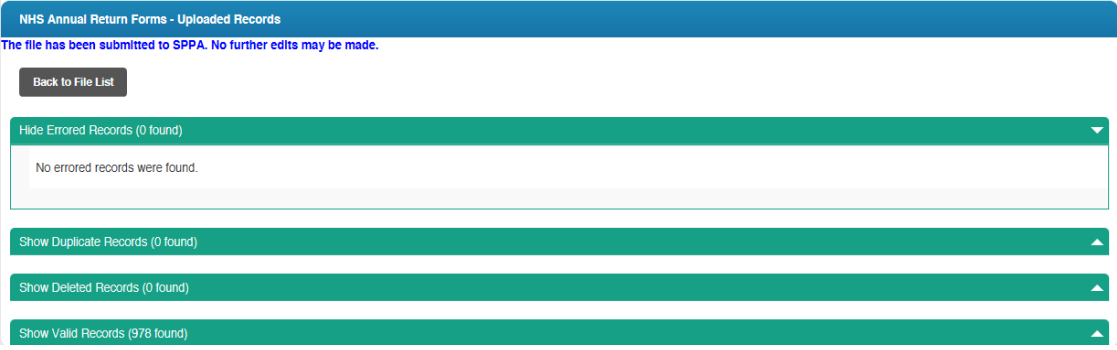
You will be prompted to press the 'Refresh' button. If your upload is successful you will see the following screen:



This screen details your file upload with information displaying when the file was uploaded and who uploaded the file along with the file name. The 'Further info' and 'Completed On' columns give the number of successfully uploaded records and the date and time the upload was completed.

Green Dot – Successful Data Upload


The green dot under ‘Status’ indicates the upload has been successful. The  icon under ‘View’ allows you to view your uploaded data:





This will break down your uploaded file into ‘Errored’, ‘Duplicate’, ‘Deleted’ and ‘Valid’ Records. If your file is successful on first submission you will not see any errored or deleted records in this view. When your upload status is green you will not be able to make further changes to any of the records.

If there are errors within the bulk upload file the status indicator will show either a red or amber dot.


Red Dot – Unsuitable Format

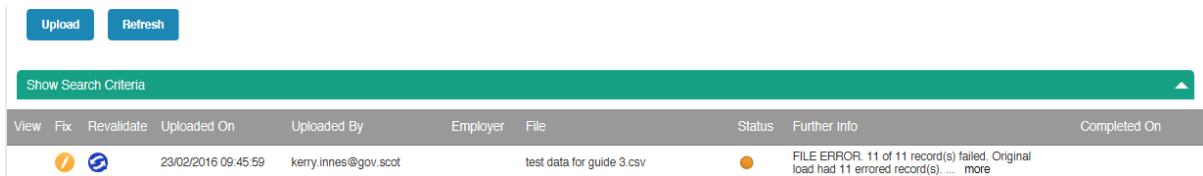
Where the bulk upload contains wholly unsuitable data, the status icon will be a red dot and there will be an exclamation mark  within the red icon under ‘View’ in the list entry. This indicates that the file has not been accepted by the system and is unable to be viewed.




As this error means the upload file has been deemed unacceptable it will need to be checked for fundamental errors (such as loading the wrong form type), amended and then reloaded.

	19/02/2016 10:11:26	Michael.Riddell@gov.scot	STPS.02.5-6.csv		ERROR: Incorrect form code in file data row. This page is for uploading Starter forms only. Each type of form has a separate upload page, accessible from the links on the 'Home' page. 1 less
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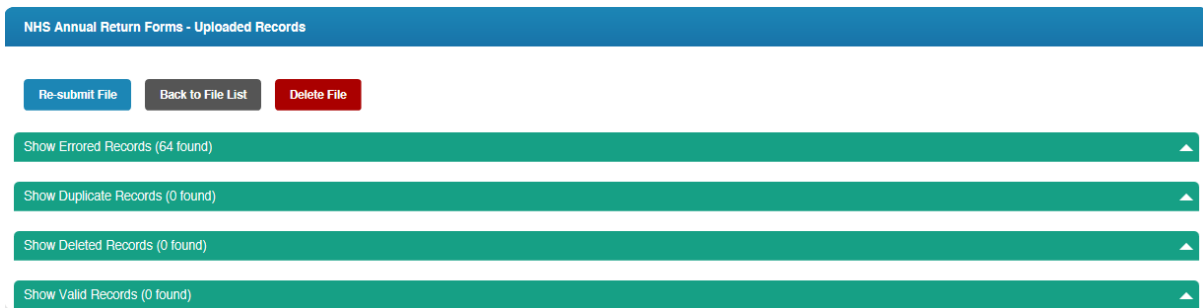
Amber Dot – Acceptable Format with Errors

If the file has a mixture of valid and errored files, the upload entry will display an amber dot. Click the pen icon  under 'Fix' to proceed to the fix menu.



View	Fix	Revalidate	Uploaded On	Uploaded By	Employer	File	Status	Further Info	Completed On
			23/02/2016 09:45:59	kerry.innes@gov.scot		test data for guide 3.csv		FILE ERROR. 11 of 11 record(s) failed. Original load had 11 errored record(s). ... more	

The fix menu will break down your upload into errored, duplicate, deleted and valid records:



NHS Annual Return Forms - Uploaded Records

[Re-submit File](#)
[Back to File List](#)
[Delete File](#)



[Show Errored Records \(64 found\)](#)
[Show Duplicate Records \(0 found\)](#)
[Show Deleted Records \(0 found\)](#)
[Show Valid Records \(0 found\)](#)

Each menu will expand to show the individual entries in each category.

Errored Records

If you expand the errored records file you will see a list of all the entries that contain errors.



	02	50505	780072	31400	02061977	MS	F	DIBBLE	S	AB473692C	01	365	348883	
	02	50505	781446	133298	22121977	MRS	F	DIBBLE	F	AB736985C	07	0362	1365	107974
	02	50505	781900	30667	02041983	MR	M	DIBBLE	R	AB123456C	01	365	459317	

To correct the data, click on the yellow pen  beside each individual record.

This will take you to the single record screen (this is the same as manual entry)

Data Entry Form: Leaver

Employer Code * 50505
 National Insurance Number * AB473692C
 Superannuation Number 780072
 Pay Reference Number * 31400
 Date of Birth * 02/06/1977
 Sex * Female
 Title * MS
 Surname * DIBBLE
 Forename * S
 Middle Name Initials

Leaving Date * 31/03/2015
 Reason for Leaving * 32 - Retainer Scheme Arrangement
 Employee Contribution Rate (%) *

Member Contributions
 Employees Pension Contributions 3,314.40
 Employers Pension Contributions 3,314.40
 Additional Percentage Contributions
 Additional Pension Contributions
 Cons on a higher Salary 0.00
 Salary Rate at Date of Leaving * 348.87
 State Scheme Earnings (whole £ only) 29,458

Service
 Type of Service * 01 - WHOLE TIME
 Full Time Days * 365

Pay
 Employees Pensionable Pay 34,888.32
 Overtime or CARE Pensionable Pay 34,888.32
 Employers Pensionable Pay 34,888.32

Notes
 Submit Save for later
 Delete record Return to record list
 Employee Contribution Rate is required

Errored fields are highlighted in red, and there is an explanation of each error to the right, also in red.

Once you have entered the correct information, click on 'Submit', and you will be taken back to the previous screen. You also have the option to save your progress or delete the record if you no longer wish to submit that individual record with the rest of the data.


STPS Leaver Forms - Uploaded Records

The record is fixed. Please correct any further errored records and click the 'Re-submit File' button to re-attempt submitting the file to SPPA.

Re-submit File Back to File List Delete File

Hide Errored Records (11 found)

Fixed	Deleted	Edit	Form Type Code	Employer Code	Superannuation Number	Pay Reference Number	Date of Birth	Title	Sex	Surname	Forename	Middle Name Initials	National Insurance Number	Type of Service	Employee Contribution Rate	Full Time Days	Part Time Hours (including holiday hours)	Full Time Hours	Emplo Pensik Pay
✓			02	50505	780072	31400	02061977	MS	F	DIBBLE	S		AB473692C	01	0790	365			034888

When you have corrected a record you will see a green tick icon . A confirmation message also informs you that the record is now fixed.

Once all the individual records have been corrected click the 'Re-submit File' button to re-process the entire file.

CSV Bulk Upload: Leaver

The file 'test data for guide 3.csv' has been submitted for re-processing.

EDM Data Leaver CSV

Browse...

Show Search Criteria

View	Fix	Revalidate	Uploaded On	Uploaded By	Employer	File	Status	Further info	Completed On
			23/02/2016 09:45:59	kerry.innes@gov.scot		test data for guide 3.csv	●	File awaiting re-validation ...	

Once re-processed the corrected file will display a green dot and your file is accepted to SPPA.

Show Search Criteria

View	Fix	Revalidate	Uploaded On	Uploaded By	Employer	File	Status	Further info	Completed On
<input checked="" type="checkbox"/>			23/02/2016 09:45:59	kerry.innes@gov.scot		test data for guide 3.csv	●	SUCCESS: 11 of 11 record(s) valid. Original load had 11 errored record(s) ... more	23/02/2016 10:31:46

Things to consider with bulk uploads

Be careful when re-opening saved CSV files prior to uploading to EDM as leading zeroes will be lost. EDM has field padding enabled for most fields however the pay reference will be incorrect if leading zeroes are lost.

Large files may take longer to process so it may be useful to upload your file before leaving for the day and then login the next working day to check the status of your file.

If you notice a common error in your uploaded file in the errored records list (e.g. incorrect contributions rates) it may be quicker to delete the EDM file and correct the upload source file before re-uploading to EDM.

If you are having difficulty uploading your files please contact the EDM team using the 'Contact Us' function or telephone on 01896 893000 and ask for 'EDM'. You can also email SPPAEDM-Enquiry@gov.scot.