

nmds-sc™
national minimum
data set for social care



Quick Start Guide – Using the Bulk Upload Tool

November 2009
Version 1

T R I B A L

cwdc
Part of the Sector Skills Council,
Skills for Care and Development

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What is the Bulk Upload Tool?

The Bulk Upload Tool allows employers to quickly and efficiently provide large amounts of workforce information to the NMDS-SC Online without the need for manual data entry. This gives employers easy access to the range of benefits associated with NMDS-SC Online.

The Bulk Upload Tool functionality is mainly aimed at Local Authorities and large private and voluntary employers who wish to submit their NMDS-SC data on behalf of multiple subsidiary establishments. However, the tool is also available to single-establishment employers who wish to use it.

What do you need to consider before you get started?

- Using the Bulk Upload functionality requires the employer to register with NMDS-SC Online as a “bulk upload user” and as a “parent organisation” if the employer wishes to administer data on behalf of multiple subsidiary establishments.
- Employers will need to provide separate organisation and worker data files compliant with a defined technical specification (samples are available). This is the same information required when manually entering data on NMDS-SC Online and includes services provided, number of workers, their main job roles and their qualifications.
- The technical specification states that all the data needs to be collated in a specific manner and then saved in CSV (comma-separated variable) format.
- All data that is provided using the Bulk Upload function will overwrite anything employers already have on NMDS-SC Online.

Before you apply to be a “Bulk Upload Tool User” please ensure you have read all the guidance documents in the Resources Section of the website in particular the Technical Specification Document.

Applying to be a Bulk Upload Tool User

When logged into your account click on the “My Establishment” link on the left hand side menu. Under “Other Information” click the edit button at the side of “Is a Bulk Upload User”. This will take you to the Bulk Upload Application Page.

Click “Apply to be a Bulk Uploader” This will send a message to Skills for Care Administrators who will contact you regarding your applications. The history of your applications can be found on this page. Once your application has been approved you will receive an email informing you of this.

true care

Contact Details

NMDS-SC Id:	D128347
Establishment Address:	5 Albion Place Leeds LS1 6JL View Map
Establishment Telephone Number:	02345 67896
Establishment Email:	

[Edit](#)

Users at Establishment

[JACKIE Main \(OPERATIONS MANAGER\)](#)

[Edit](#)

Establishment Details

Type:	Private sector
Current Investors in People (IIP) Status:	Neither
Data Sharing Permission Skills for Care:	Yes

[Edit](#)

Other information

Last Updated:	17/11/2009
CSSR:	Leeds
Gov Region:	Yorkshire & Humber
Is a Parent:	Yes
Is subsidiary of:	N/A
Is a Bulk Upload User:	No

[Edit](#)

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true care [View Establishment](#)

Record Saved Successfully

Bulk Uploader Application

Status:
You are not currently a bulk uploader

[Apply to be a bulk uploader](#)

bulk uploader application history

Application Date	Status	Application By
17/11/2009	Cancelled application to be a bulk uploader	JACKIE Main
17/11/2009	Applied to be a bulk uploader	JACKIE Main

[Return](#)

Setting your Local Identifiers

Click on Bulk Upload on the left hand side menu, this will take you to the bulk upload page where you must set local identifiers for all accounts that are linked to yours and for the parent account. Click the link in the red box to complete this step.

NB: The local identifier can be anything you choose e.g. numbers, letters etc. but have to be unique to each establishment.

Once you have completed this step click save and then click return. This will take you back to your “my establishment” page.

Establishment Name	NMDs-SC ID	Local Identifier
I Care	H104693	abcd
TRUE CARE	D128347	1234
Tester 1	J149647	jackie

Downloading Current Data

To begin using the Bulk Upload Tool click “Bulk Upload” on the left hand menu.

From here you can download your current data, this will provide you with CSV files containing any data you have already entered onto NMDS-SC, you can then amend/add new subsidiaries and workers to this file.

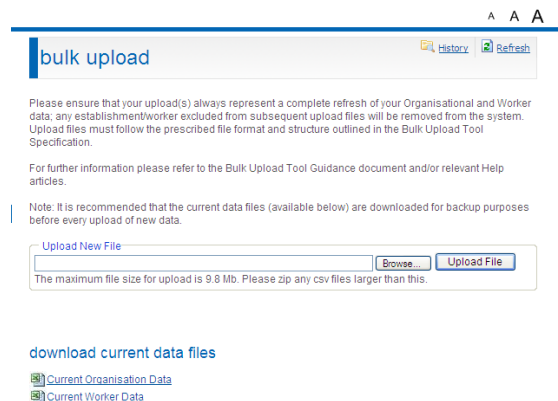
NB: The organisation and worker files are two separate files and you should download them at the same time to ensure that the provid remains the same (see technical specification document for further information on the provid).

Once you are satisfied that you have made all your changes and added any new subsidiaries/workers to your files you are ready to validate. Please remember to format the CQC column of your organisation file before saving (see section on formatting columns).

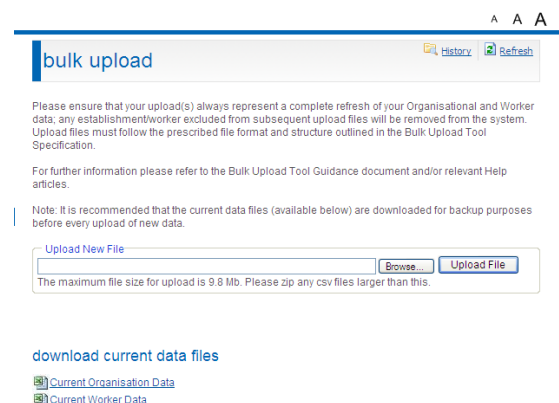
Uploading Your Data

To upload your files click browse, find the location of your saved files and then click upload files. Repeat this for worker files.

NB: If you already have worker data on any of your subsidiary/parent account you will have to upload both files together. If you do not currently have worker data on any of your subsidiary/parent accounts you can upload the organisation data only. As soon as you add worker data to any of your accounts you must update both files every time you carry out a Bulk Upload as importing files via Bulk Upload overwrites the data held within NMDS-SC



The screenshot shows the 'bulk upload' interface. At the top right are three 'A' icons for font size. Below the title bar are 'History' and 'Refresh' buttons. The main content area contains a warning: 'Please ensure that your upload(s) always represent a complete refresh of your Organisational and Worker data; any establishment/worker excluded from subsequent upload files will be removed from the system. Upload files must follow the prescribed file format and structure outlined in the Bulk Upload Tool Specification.' Below this is a note: 'For further information please refer to the Bulk Upload Tool Guidance document and/or relevant Help articles.' Another note states: 'Note: It is recommended that the current data files (available below) are downloaded for backup purposes before every upload of new data.' There is an 'Upload New File' section with a text input field, a 'Browse...' button, and an 'Upload File' button. A note below reads: 'The maximum file size for upload is 9.8 Mb. Please zip any csv files larger than this.' At the bottom, there is a 'download current data files' section with two links: 'Current Organisation Data' and 'Current Worker Data'.



This is an identical screenshot to the one above, showing the 'bulk upload' interface with the same layout, warnings, and instructions.

Validating Your Files

Once you have uploaded your files click the validate files button. The system will check both your CSV files to ensure there are no errors within these files. The Bulk Upload Tool checks for things like missing mandatory fields, duplicate accounts, gaps in data etc.

Failed Validation

If there is a problem with any of the data within either of your files your validation will fail and you will receive a message similar to the one on the right.

The yellow box is giving the information regarding what will happen when you bulk upload for example 5 establishments will be created, 1 establishment will be deleted and 150 workers will be created, if this is not what you expected to happen please click delete and re look at your files.

The red box is informing you of the errors and warnings you have within your files. Errors will cause your validation to fail whereas warnings will be accepted and can be addressed at a later stage. To find out what your errors and warnings are click on the full results link, right hand side of your file names, this will open in notepad, please save this file for future use as it will disappear once you click delete.

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bulk upload

Please ensure that your upload(s) always represent a complete refresh of your Organisational and Worker data; any establishment/worker excluded from subsequent upload files will be removed from the system. Upload files must follow the prescribed file format and structure outlined in the Bulk Upload Tool Specification.

For further information please refer to the Bulk Upload Tool Guidance document and/or relevant Help articles.

Note: It is recommended that the current data files (available below) are downloaded for backup purposes before every upload of new data.

uploaded files

Filename	Uploaded By	Date / Time	
train_org.csv	JACKIE Main	18 Nov 09 10:18	Delete
train_work.csv	JACKIE Main	18 Nov 09 10:18	Delete

validate files

You have uploaded enough files to start the validation process.

download current data files

[Current Organisation Data](#)

[Current Worker Data](#)

[History](#) [Refresh](#)

bulk upload

Please ensure that your upload(s) always represent a complete refresh of your Organisational and Worker data; any establishment/worker excluded from subsequent upload files will be removed from the system. Upload files must follow the prescribed file format and structure outlined in the Bulk Upload Tool Specification.

For further information please refer to the Bulk Upload Tool Guidance document and/or relevant Help articles.

Note: It is recommended that the current data files (available below) are downloaded for backup purposes before every upload of new data.

uploaded files

Filename	Uploaded By	Date / Time		
train_org.csv	JACKIE Main	18 Nov 09 10:18	Delete	Full Results
train_work.csv	JACKIE Main	18 Nov 09 10:18	Delete	Full Results

validation failed

The following 5 establishments will be created
Establishment 791
Establishment 539
Jackiemac
kens house
home work

The following establishment will be deleted
Tester 1 J149647

150 new workers will be created

Your files have failed the validation checks. A summary of the errors is shown below, but for full details of the errors plus any warnings, please download the **Full Results** for each file.

* Summary *

No Of Errors : 14 (will cause file(s) to be rejected)
(Organisation file: 2, Worker file: 12)

No Of Warnings : 145 (files will be accepted but data is incomplete or internally inconsistent)
(Organisation file: 15, Worker file: 130)

No Of Establishments : 7
No Of Workers : 151

download current data files

[Current Organisation Data](#)

[Current Worker Data](#)

NB In the full results document it will tell you what the problem is and what line it is on, please remember the line number does not include the headers therefore line numbers will always be plus 1.

Click delete at the side of both your file names to remove the files from the Bulk Upload Tool. You should then work through your saved files and correct ALL errors before trying to upload again.

NB. If only one file has failed validation you can just delete this file from the screen, amend your original document and upload it again.

Passed Validation

Once you have corrected the errors with your files you can now repeat the steps above for uploading your files and validating a second time.

When you have passed validation you see the message on the right, this will give you a summary of information for example no of establishments 1, no of workers 0 etc.

Ensure this is what you expected, if not delete and correct your files as above.

bulk upload

Please ensure that your upload(s) always represent a complete refresh of your Organisational and Worker data; any establishment/worker excluded from subsequent upload files will be removed from the system. Upload files must follow the prescribed file format and structure outlined in the Bulk Upload Tool Specification.

For further information please refer to the Bulk Upload Tool Guidance document and/or relevant Help articles.

Note: It is recommended that the current data files (available below) are downloaded for backup purposes before every upload of new data.

uploaded files

Filename	Uploaded By	Date / Time		
train.org.csv	Jackie McEvoy	18 Nov 09 11:28	Delete	Full Results
train.work.csv	Jackie McEvoy	18 Nov 09 11:28	Delete	Full Results

validation passed

Your files have passed the validation checks. A summary of the data in the import files is shown below. You are also advised to download the **Full Results** for each file to view any warning messages.

* Summary *

No Of Errors : 0 (will cause file(s) to be rejected)
(Organisation file: 0, Worker file: 0)
No Of Warnings : 0 (files will be accepted but data is incomplete or internally inconsistent)
(Organisation file: 0, Worker file: 0)
No Of Establishments : 1
No Of Workers : 0

[download current data files](#)

Trust

Importing Your Files

When you are satisfied that the information is correct you can click import files.

Once you have clicked import the data that is contained within your CSV files will replace all data held on NMDS-SC for your accounts.

NB Importing data usually happens instantaneously but in periods of high traffic to the website it may be necessary to store your import until the site is quieter i.e. overnight. The system will email you to say that your files have been received for import and will then email you again once import has been successful.

You can see on this page the last time your successfully uploaded data. At the top right hand side of this page is a history button, this will give you a complete history of every bulk upload you have successfully completed.

bulk upload

Please ensure that your upload(s) always represent a complete refresh of your Organisational and Worker data; any establishment/worker excluded from subsequent upload files will be removed from the system. Upload files must follow the prescribed file format and structure outlined in the Bulk Upload Tool Specification.

For further information please refer to the Bulk Upload Tool Guidance document and/or relevant Help articles.

Note: It is recommended that the current data files (available below) are downloaded for backup purposes before every upload of new data.

uploaded files

Filename	Uploaded By	Date / Time
train org.csv	Jackie McEvoy	18 Nov 09 11:31
train work.csv	Jackie McEvoy	18 Nov 09 11:31

files submitted for import

[Last successful import at 11:31 on 18 Nov 2009.](#)

[download current data files](#)

A A A

bulk upload

[History](#) [Refresh](#)

Please ensure that your upload(s) always represent a complete refresh of your Organisational and Worker data; any establishment/worker excluded from subsequent upload files will be removed from the system. Upload files must follow the prescribed file format and structure outlined in the Bulk Upload Tool Specification.

For further information please refer to the Bulk Upload Tool Guidance document and/or relevant Help articles.

Note: It is recommended that the current data files (available below) are downloaded for backup purposes before every upload of new data.

Upload New File

The maximum file size for upload is 9.8 Mb. Please zip any csv files larger than this.

[Last successful import at 11:32 on 18 Nov 2009.](#)

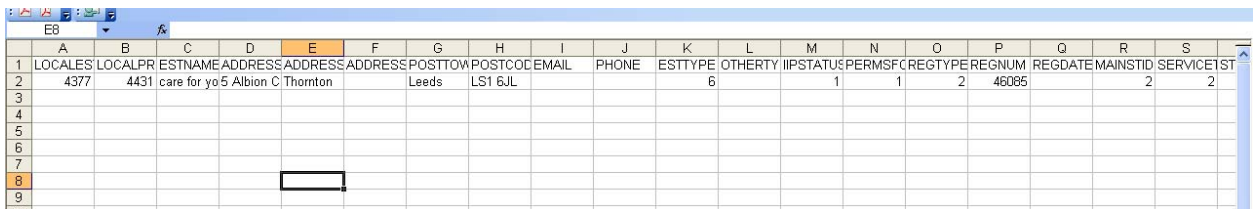
[download current data files](#)

[Current Organisation Data](#)

[Current Worker Data](#)

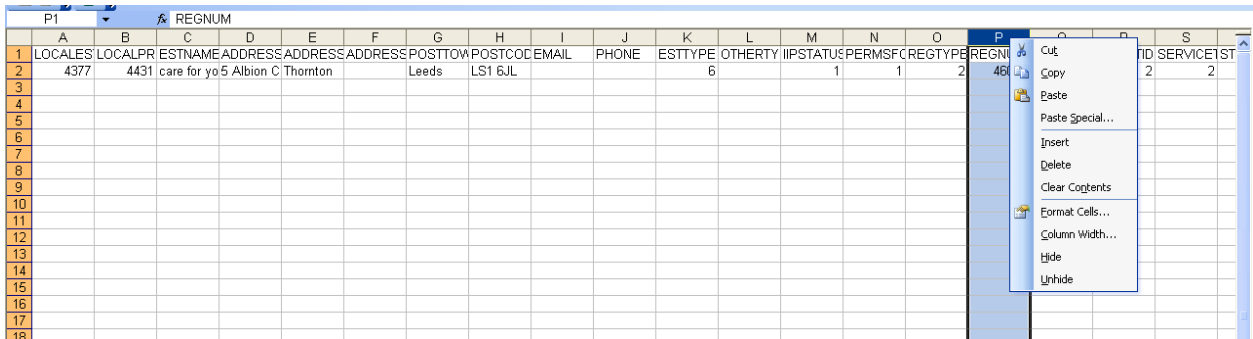
Formatting Columns

When you have completed all your changes to the organisation CSV file you must remember to re-format certain columns. Opening a CSV file in excel means that columns will lose their leading zero's. The only column that is affected by this is the column that contains CQC numbers, this is due to CQC numbers beginning with four or more zero's.



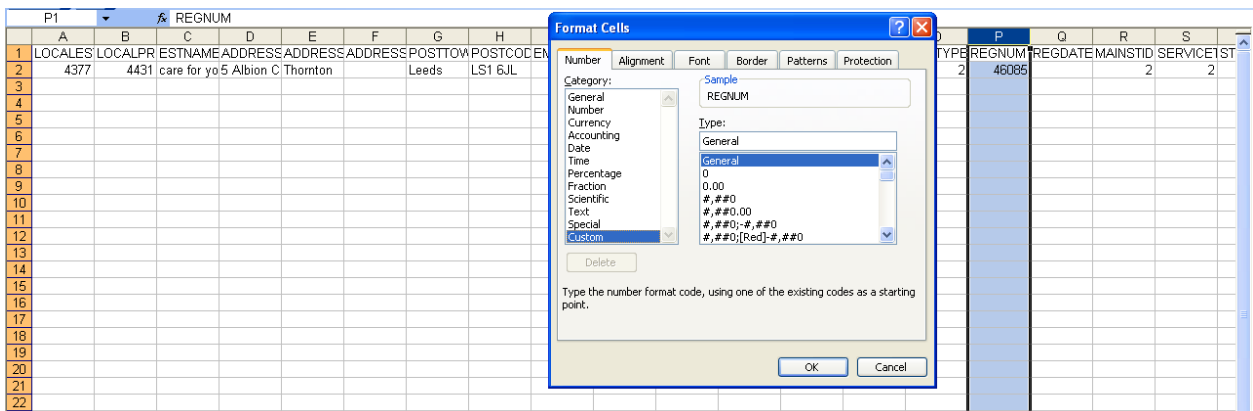
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	LOCALES	LOCALPR	ESTNAME	ADDRESS	ADDRESS	ADDRESS	POSTTOW	POSTCOD	EMAIL	PHONE	ESTTYPE	OTHERTY	IIPSTATUS	PERMSFC	REGTYPE	REGNUM	REGDATE	MAINSTID	SERVICE1ST	
2		4377	4431	care for yo5	Albion C	Thornton		Leeds	LS1 6JL		6			1	1	2	46085		2	2
3																				
4																				
5																				
6																				
7																				
8																				
9																				

You will notice when you open your CSV file that column P has only numbers in without the leading zero's to rectify this select the whole column and right click.



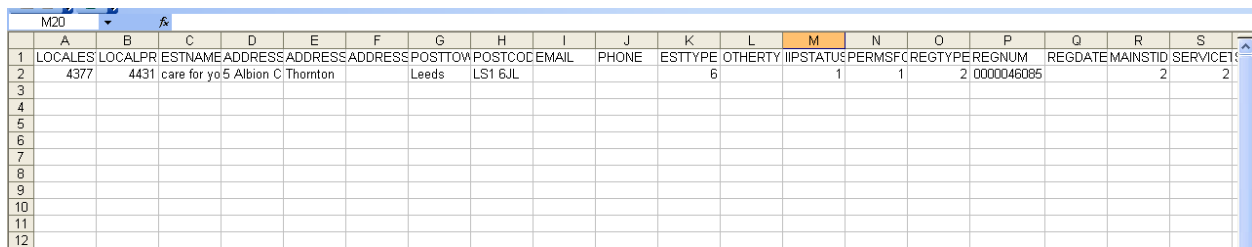
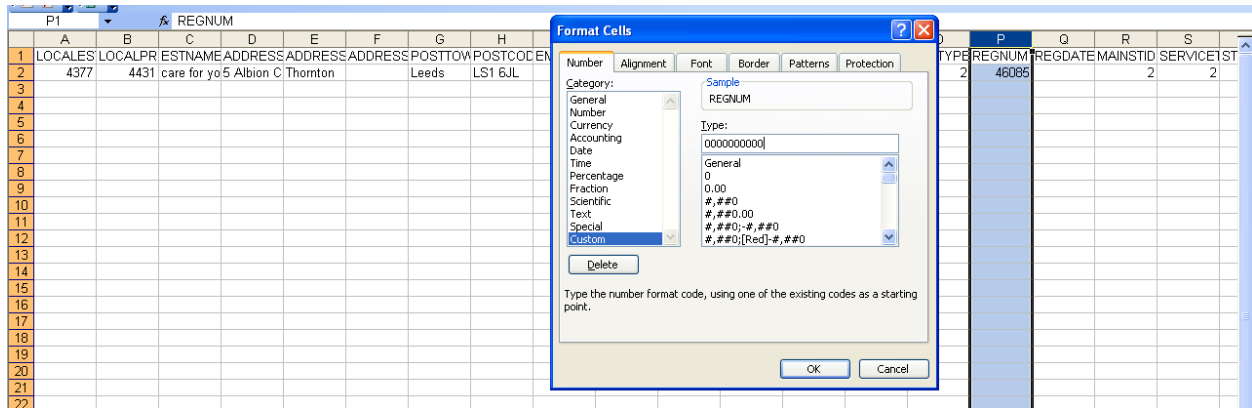
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	LOCALES	LOCALPR	ESTNAME	ADDRESS	ADDRESS	ADDRESS	POSTTOW	POSTCOD	EMAIL	PHONE	ESTTYPE	OTHERTY	IIPSTATUS	PERMSFC	REGTYPE	REGNUM	REGDATE	MAINSTID	SERVICE1ST	
2		4377	4431	care for yo5	Albion C	Thornton		Leeds	LS1 6JL		6			1	1	2	46085		2	2
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Select format cells, custom



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	LOCALES	LOCALPR	ESTNAME	ADDRESS	ADDRESS	ADDRESS	POSTTOW	POSTCOD	EMAIL	PHONE	ESTTYPE	OTHERTY	IIPSTATUS	PERMSFC	REGTYPE	REGNUM	REGDATE	MAINSTID	SERVICE1ST	
2		4377	4431	care for yo5	Albion C	Thornton		Leeds	LS1 6JL		6			1	1	2	46085		2	2
3																				
4																				
5																				
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In the general box type in ten zero's, click ok to change.



You can now save your document. If you re-open your document you will have to follow these steps again.