Quick Start Guide – Using BUDI
(Bulk Uploading Data Items)

March 2017

Version 5

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What is the BUDI?

BUDI 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.

BUDI 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 BUDI 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, worker and training data files compliant with the BUDI guidance documents (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.

- BUDI guidance documents states that all the data needs to be collated in a specific manner and then saved in CSV (comma-separated variable) format.

Before you apply to be a "Bulk Upload User" please ensure you have read all the guidance documents in the Help and Guidance Section of the website.

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Applying to be a Bulk Upload 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.

Contact Details	
NMDS-SC Id:	J261127
Establishment Address:	Grace Street Leeds LS1 2RP View Map
Establishment Telephone Number:	0845 873 0129
Establishment Email:	
	Edit

Users at Establishment	
ABC AL	
	Edit

Establishment Details	
Type:	Private sector
Current Investors in People (IiP) Status:	Neither
Data Sharing Permission Skills for Care:	Yes
Data Sharing Permission CQC:	Yes
Data Sharing Permission: NHS Choices and My NHS:	Yes
Data Sharing Permission Local Authority:	Yes
e-Learning for Healthcare user registration code:	18FMQ1 ?
User registration code valid from:	15/02/2015
	Edit

Other Information		
CSSR:	Leeds	
Gov Region:	Yorkshire & Humber	
Is a Parent:	No	Edit
Is subsidiary of:	N/A	Edit
Is a Bulk Upload User:	No	Edit

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.

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.

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.

> ✪ You must set local identifiers for all of your establishments before you can use the bulk upload system.

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

set local establishment identifiers for true care

Please provide a unique local identifier ('LOCALESTID') for each of your existing subsidiary establishments when using the bulk upload tool for the first time. This will allow NMDS-SC Online to uniquely identify each establishment so that the system can determine whether the establishments listed in the import file are already on the system.

Please note that the local identifiers entered online must match the local identifiers ('LOCALESTID') used in your upload files. For new establishments created via the bulk upload tool the system will automatically take the local identifier provided in the import file and store this for future use.

For further explanation please see the Bulk Upload Tool User Guide.

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

Return   Save

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

Setting your Unique Worker Identifiers

Click on "my establishment" and scroll down to the section that is called "other information". In here you will see a link "Set Local Worker Identifiers" Click edit to set/change the identifiers for your workers.

Other Information	
CSSR:	Wiltshire
Gov Region:	South West
Is a Parent:	Yes
	Edit
Is subsidiary of:	N/A
Is a Bulk Upload User:	Yes
	Set Local Worker Identifiers | Edit
Local Identifier:	Parent
	Edit
Last Bulk Upload:	20/06/2011

In this section you will see a list of your subsidiaries with a link at the side of each name "show", Clicking this link will let you see all your workers connected to that particular subsidiary. Here you can add/change the worker identifier, click hide again to close the list. Please remember to click save when you have finished updating this section.

set local worker identifiers for true care

Back

Please provide a unique local identifier ('UNIQUEWORKERID') for each of your existing workers when using the bulk upload tool for the first time. This will allow NMDS-SC Online to uniquely identify each worker so that the system can determine whether the workers listed in the import file are already on the system.

Please note that the local identifiers entered online must match the local identifiers ('UNIQUEWORKERID') used in your upload files. For new workers created via the bulk upload tool the system will automatically take the local identifier provided in the import file and store this for future use.

For further explanation please see the Bulk Upload Tool User Guide.

workers for janets care home
Hide

Display Id	NI Number	Local Worker Identifier
Steven	NE379814C	steven

workers for true care
Show

Save

The worker identifiers are purely for bulk upload purposes and can be whatever you want to set i.e. pay roll number. Skills for Care do not use this information. The worker identifier will remain with that particular worker record for the life of the record. You can amend worker identifiers within your CSV file by following the guidance within the Worker Guidance Document.

Downloading Current Data

To begin using BUDI 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 these file.

Bulk Upload

View Establishment | 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 BUDI Guidance documents..

For further information please refer to the BUDI 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.

ONCE YOUR FILES HAVE PASSED VALIDATION PLEASE REMEMBER TO IMPORT THEM.

Upload New File

Browse... | Upload File

The maximum file size for upload is 20 Mb. Please zip any csv files larger than this.

Last successful import at 16:30 on 24 Feb 2017.

Download Current Data Files

- Current Organisation Data
- Current Worker Data
- Current Worker Training Data

Once you are satisfied that you have made all your changes and added any new subsidiaries/workers to your files you are ready to upload.

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 and training files if required.

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 and or training data to any of your accounts you must update all files every time you carry out a Bulk Upload this is to prevent the system from thinking you want to delete the missing data.

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Validating Your Files

Once you have uploaded your files click the validate files button. The system will check all your CSV files to ensure there are no errors within these files. BUDI 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 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.

Uploaded Files

	Filename	Uploaded By	Date / Time		
✅	ORGANISATION.csv	Jackie Green	27 Feb 17 12:23	Delete	Full Results
❌	WORKER.csv	Jackie Green	27 Feb 17 12:25	Delete	Full Results

Upload New File

Browse...   Upload File

The maximum file size for upload is 20 Mb. Please zip any csv files larger than this.

Validation Failed

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 : 5 (will cause file(s) to be rejected)
   (Organisation file: 0, Worker file: 5, Training File: 0)
No Of Warnings : 15 (files will be accepted but data is incomplete or internally inconsistent)
   (Organisation file: 0, Worker file: 15, Training File: 0)
No Of Establishments : 8
No Of Workers : 17
No Of Training Records : 0

Last successful import at 16:30 on 24 Feb 2017.

NB In the full results document it will tell you what the problem is and what line it is on.

Click delete at the side of both your file names to remove the files from BUDI. 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.

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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 your expected, if not delete and correct your files as above.

Importing Your Files

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

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 you 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.

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You can see all the files that have been uploaded by clicking on history.

At the top right hand side of this page is an option to delete history.

Bulk Upload History

Delete History... | Back

Displaying 1 to 5 of 23

	Organisation File	Worker File	Training File
27/01/2015	Uploaded by: San Green on: 27/01/2015 at: 15:28	Uploaded by: San Green on: 27/01/2015 at: 15:29	Uploaded by: San Green on: 27/01/2015 at: 15:29

Files submitted   15:29 27/01/2015 (San Green)
for validation:

Files submitted   15:29 27/01/2015 (San Green)
for import:

****
* Summary *
****

No Of Errors : 0 (will cause file(s) to be rejected)
  (Organisation file: 0, Worker file: 0, Training File: 0)
No Of Warnings : 51 (files will be accepted but data is incomplete or internally inconsistent)
  (Organisation file: 42, Worker file: 9, Training File: 0)
No Of Establishments : 23
No Of Workers : 169
No Of Training Records : 6

	Organisation File	Worker File
26/01/2015	Uploaded by: San Green on: 26/01/2015 at: 10:58	Uploaded by: San Green on: 26/01/2015 at: 10:58

Files submitted   10:58 26/01/2015 (San Green)
for validation:

Files submitted   10:58 26/01/2015 (San Green)
for import:

****
* Summary *
****

Checking this will enable you to select which files you wish to delete.

Either select the main Tick box at the top or select file you wish to delete individually.

You then click delete at the bottom right hand side of the screen to remove the bulk upload history.