

## Help and Documentation

Listed below is a step-by-step guide on how to bulk upload Subsidy Awards.

### Before you begin:

- A Subsidy Measure needs to be in place before a Subsidy Award can be added.
- If a Subsidy Measure is not in place for an Award that you want to upload, you will need an Approver to create a new Subsidy Measure.
- You will need to add the Subsidy Control Number and Subsidy Measure Title in the bulk upload file.

### How to upload:

- Under the 'Download template' tab, download the template file.
  - Open the downloaded template file and fill in the relevant information using the table below
  - Save your filled in file as a CSV or Microsoft Excel spreadsheet
  - Go to the 'Upload file' tab and upload the saved file
  - Successfully uploading will save the Subsidy Awards in Finalised status and automatically submits the awards for Approval. Once approved they will be published. If rejected you will receive a notification with the reason.
  - If there are errors you will be notified on the screen and can download a PDF of the errors to help remediate them and upload again.

### Information needed Bulk upload file:

Required fields	Mandatory/ optional	Definition and use	Format
Subsidy Control Number	Mandatory	From the Subsidy Measure. This will now start with the letters 'SC' followed by 5 digits.	SCXXXXX
Subsidy Measure Title	Mandatory	From the Subsidy Measure	

Standalone Award	Mandatory	Defines whether or not the subsidy award in question is "standalone".	Yes No
Subsidy Award Description	Optional	This description should include TCA requirements such as relevant time limits or other conditions attached to the scheme.	Limit 2000 characters
Subsidy Objective	Mandatory	<p>The Why the Award is being made. Select one of the following values:</p> <ol style="list-style-type: none"> <li>1) Research and development</li> <li>2) Environmental protection</li> <li>3) Energy efficiency</li> <li>4) Culture/Heritage</li> <li>5) SME support</li> <li>6) Regional development</li> <li>7) Training</li> <li>8) Employment</li> <li>9) Infrastructure</li> <li>10) Rescue aid</li> <li>11) Other</li> </ol>	

Subsidy Instrument	Mandatory	How the Award is being made. Select one of the following values:  1) Direct Grant 2) Loan 3) Equity 4) Guarantee 5) Tax measures (tax credit, or tax/duty exemption) 6) Provision of goods or services below market prices 7) Purchase of goods or services above market prices 8) Other	
Subsidy Element Full Amount (£)	Mandatory when NOT a Tax Measure	Where the Subsidy Instrument is Not a Tax Measure enter as a Full Amount Exactly. When it is a Tax measure enter 0	
Subsidy Element Full Amount Range	Mandatory when a Tax Measure	Where the Subsidy Instrument is a Tax Measure enter as a Range. When it is a Not a Tax measure enter NA	1. Refer to bandings below 1- 60000 60001-500000 500001-1000000 1000001-2000000 2000001-5000000 5000001-10000000 10000001-30000000 30000001 >

National ID Type	Mandatory	<p>Select one of the following values:</p> <ul style="list-style-type: none"> <li>- Company Registration Number</li> <li>- Charity Number</li> <li>- VAT Number</li> <li>- UTR Number</li> </ul>	
National ID Number	Mandatory	<ul style="list-style-type: none"> <li>- Company Registration Number</li> <li>- Consist of 8 digits or 2 letters followed by 6 digits.</li> <li>- Charity Number can have up to 8 digits and a dash (-) before the last digit.</li> <li>- VAT Number consists of nine digits</li> <li>- UTR It is a set of 10 numbers</li> </ul>	
Beneficiary Name	Mandatory/Optional	The name of the company, charity or other institution getting the award.	

		<ul style="list-style-type: none"> <li>- Mandatory if you have selected the National ID Type as 'VAT Number' or 'UTR'</li> <li>- Optional if you have selected the National ID Type as 'Company Registration Number'</li> <li>- or 'Charity Number'</li> </ul>	
Size of the Organization	Mandatory	<p>Please select one of the following values:</p> <ol style="list-style-type: none"> <li>1) Micro organisation</li> <li>2) Small organisation</li> <li>3) Medium organisation</li> <li>4) Large organisation</li> </ol>	<p>Micro – 0-9 employees  Small – 10-49 employees  Medium - 50-249 employees  Large – 250+ employees</p>
Granting Authority Name	Mandatory	The name of the Granting Authority giving the award	Free text
Legal Granting Date	Mandatory	Legally binding date of commitment	DD/MM/YYYY
Goods or services	Mandatory	<p>Select one of the following values:</p> <ul style="list-style-type: none"> <li>- Goods</li> <li>- Services</li> </ul> <p>If mixed please select the option that represents the majority (greater than 50%) of your Awards</p>	

Spending Region	Mandatory	Select the region where the Award is spent:  1) North East 2) North West	
		3) Yorkshire and Humber 4) East Midlands 5) West Midlands 6) East of England 7) London 8) South East 9) South West 10) Scotland 11) Wales 12) Northern Ireland	

If you need further advice and support, here are the Contact details (Name, Role, Team, Email Address and Phone Number) of a Subject Matter Expert who can advise you, from within own Granting authority.