

## 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	

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	<p>How the Award is being made. Select one of the following values:</p> <ol style="list-style-type: none"> <li>1) Direct Grant</li> <li>2) Loan</li> <li>3) Equity</li> <li>4) Guarantee</li> <li>5) Tax measures (tax credit, or tax/duty exemption)</li> <li>6) Provision of goods or services below market prices</li> <li>7) Purchase of goods or services above market prices</li> <li>8) Other</li> </ol>	
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	Select one of the following values:  <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' 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	<p>Select the region where the Award is spent:</p> <ol style="list-style-type: none"> <li>1) North East</li> <li>2) North West</li> </ol>	

		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	
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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.