



How do I find and use import templates?

Introduction

Templates allow data to be entered into an Excel spreadsheet and imported into NROSH+, as an alternative method to completing the return on screen.

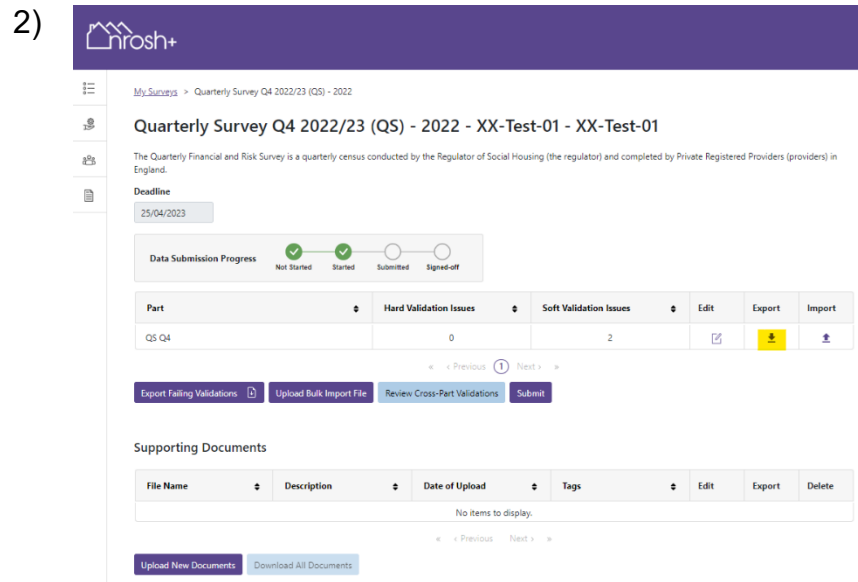
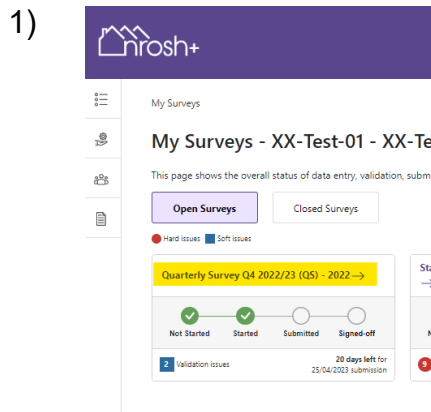
This method is designed to support data compilation and entry, particularly where large quantities of data are involved. However, it is not a replacement for using the online system entirely. For example, validation and sign-off can only be completed via the NROSH+ website.

Unlike the old NROSH+ application, import templates are specific to each provider and each survey. This allows the system to download data which is already in your survey within the template and facilitate a much easier re-import process, something which user feedback on the old NROSH+ application was an improvement a large number of providers wanted to see.

Where are the templates and how do I download them?

It is important that you use only the templates that are available to download from the 'Export' column in the Survey Summary table in the parts list. These templates ensure that data is captured and uploaded into the system accurately and safely. Any attempt to upload unauthorised documents will be rejected by the import function.

To reach the parts list – please select your survey from the dashboard (1) and then select the export icon next to the survey part (2). For surveys with multiple parts there will be an edit icon next to each part in the table.



NOTE: The template files generated when clicking 'Export' will be populated with any data currently stored on the system for the selected part. This means that providers will not need to fully re-enter data into templates when making revisions.

If you want to delete data from the survey within the NROSH+ system you can delete values from within your template and then select the 'Overwrite existing values with blank cells' option when importing (see below).

How do I import templates?

Templates are imported using the 'Import' function accessible through selecting the 'Import' icon in the Import column in the Survey Summary table in the parts list (1) and selecting the type of import you want to do (2).

1)

The screenshot shows the NROSH+ survey management interface. At the top, there's a navigation bar with the NROSH+ logo and a breadcrumb trail: 'My Surveys > Quarterly Survey Q4 2022/23 (QS) - 2022'. Below this, the survey title is 'Quarterly Survey Q4 2022/23 (QS) - 2022 - XX-Test-01 - XX-Test-01'. A progress bar indicates the survey status: 'Data Submission Progress' with stages 'Not Started', 'Started', 'Submitted', and 'Signed-off'. Below the progress bar is a table with columns: 'Part', 'Hard Validation Issues', 'Soft Validation Issues', 'Edit', 'Export', and 'Import'. The 'Part' column contains 'Q5 Q4', 'Hard Validation Issues' contains '0', and 'Soft Validation Issues' contains '2'. The 'Import' column has a yellow 'Import' button. Below the table are buttons for 'Export Failing Validations', 'Upload Bulk Import File', 'Review Cross-Part Validations', and 'Submit'. At the bottom, there's a 'Supporting Documents' section with a table for 'File Name', 'Description', 'Date of Upload', 'Tags', 'Edit', 'Export', and 'Delete'. The table is currently empty, showing 'No items to display'.

2)

The screenshot shows the 'Import Data' dialog box in the NROSH+ system. The title is 'Import Data' and the subtitle is 'Quarterly Survey Q4 2022/23 (Q)'. A blue information box contains the text: 'The default option for uploading templates is option unless you want to delete data from the survey. If you want to delete data from the survey will be removed from the database. Please note, there are some exceptions to the'. Below this, there are two radio button options: 'Ignore blank cells' (selected) and 'Overwrite existing values with blank cells'. At the bottom, there are 'Upload' and 'Cancel' buttons.

The default option for uploading templates is 'Ignore blank cells'. This means that any blank cells in the template will be ignored and will not import into the system. Any value in the system for the question (cell) left blank will be retained and other questions (cells) in the part will be updated. We recommend using this option unless you want to delete data from your survey.

If you want to delete data from the survey within the NROSH+ system you can select the 'Overwrite existing values with blank cells' option. Any data that has already been added for the part will be overwritten by the upload and if a question (cell) is left blank in the template the value already existing in the system will be removed from the database. Please note, there are some exceptions to the 'Overwrite' function and you should refer to individual survey guidance for more information.

Macro and security warnings

Microsoft have implemented a blocking facility to protect users from malware being hidden within macro enabled files. This blocks ALL macro enabled files from all websites. There are simple ways in which you can unblock individual files or ensure that all files downloaded from a website are treated as 'safe'. You will need to discuss options with your IT provider to ensure you can operate the macro driven elements.

For more information see: <https://support.microsoft.com/en-gb/topic/a-potentially-dangerous-macro-has-been-blocked-0952faa0-37e7-4316-b61d-5b5ed6024216>

You can complete and upload your import templates without enabling macros. However, for some surveys which employ particular types of question formats (FFR forecast years and SDR local authority lists) you may notice that calculated fields do not populate as expected.

Not enabling the macros may also mean you cannot easily scroll to tabs within the file. You can however right click on the arrow in the bottom left corner of your screen which will bring up the 'Activate' box. You can then select the tab you want to view from there.

The screenshot shows a 'Activate' dialog box in a spreadsheet application. The dialog box has a title bar with a question mark and a close button. The main area contains a list of tabs: 'Cover Sheet', 'Front Sheet', 'Front Sheet Reg Subs', 'Front Sheet Unreg Entities', 'Statements SOCI', 'Statements SOFP', 'Statements SOCF', 'Assumptions Inputs', 'Assumptions Stock Totals', 'Assumptions Social Tenures', 'Assumptions Other Tenures', 'Assumptions Other Inputs', 'Compliance Questions', and 'Validations'. The 'Assumptions Other Inputs' tab is selected. At the bottom, there are 'OK' and 'Cancel' buttons.