THE UNIVERSITY of NEW MEXICO

Finance Systems Management
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## Uploading Data in InfoAssist FSJA-106

NOTE: Uploaded data is public. NEVER upload confidential or sensitive information.

Before you begin, prepare your file for upload:

1. Verify that your column headers are no longer than 30 characters. Only alphanumeric characters are allowed to name your column headers.
2. Remove any special cell formatting (e.g. text wrapping, brackets indicating negative numbers, etc.).
3. For alphanumeric fields (such as Index Code, Banner ID, etc.), highlight the column and change the format to Text to ensure the file uploads with the correct data types.
4. To comply with Finance Upload standards, Excel **worksheets** must be named with your **netid** followed by a unique name. Your worksheet name cannot exceed 30 characters. Ex.: netid_NAME_12_01_13. (The name of the uploaded table in MyReports will match the name of the Excel worksheet, not the Excel file name, so be sure that you've renamed the worksheet you want to upload.)

   Note: uploaded files that are not prefixed with a netID will be purged.

Once you have prepared your file, login to MyReports and follow these steps.
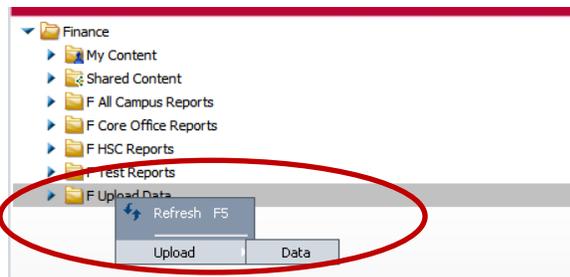
1. Right click on the "F Upload Data" folder, then select Upload->Data.
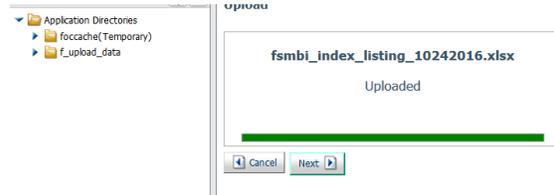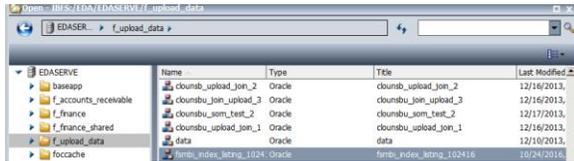

2. Click on the f_upload_data folder and then Select Upload File, browse for your file, and select it. Please do not upload your file to FOCCACHE as it is a temporary folder and your file will not be there after you log out. Alternatively, you may drag the file from its location and drop it onto the box. Then click Next.
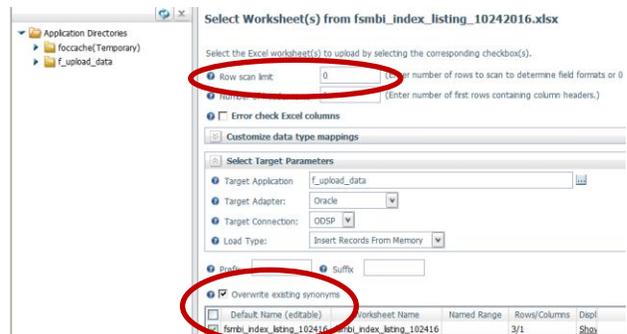
3. Check Overwrite existing synonyms, and the sheet you would like to upload. If your file is large (more than 3,000 records), change the Row scan limit to 0. Then click Next.
   Note: If you have forgotten to change your sheet name, you can do that here by checkmarking your sheet and changing the Default Name.
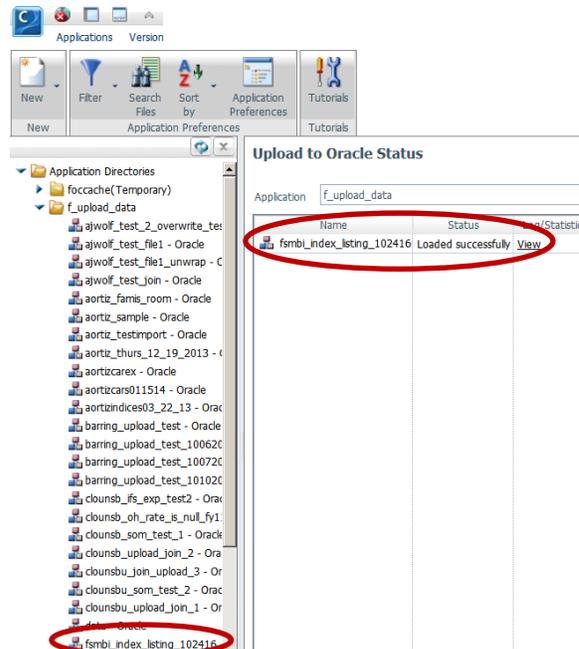
4. Verify that your upload was created successfully by checking the Status column and looking for your upload in the f_upload_data folder. You may now close the window.

5. Now, create your report using InfoAssist. You can find the uploaded data source by selecting the f_upload_data folder on the left menu.

The preceding steps should be used for .xls files. Text files, including both .txt and .csv may also be uploaded, however you will see a different screen for step 3. See below. Check Header row and Overwrite existing synonyms. Depending on how you want blank fields to be stored in the database, you may also want to check Empty fields as NULL.
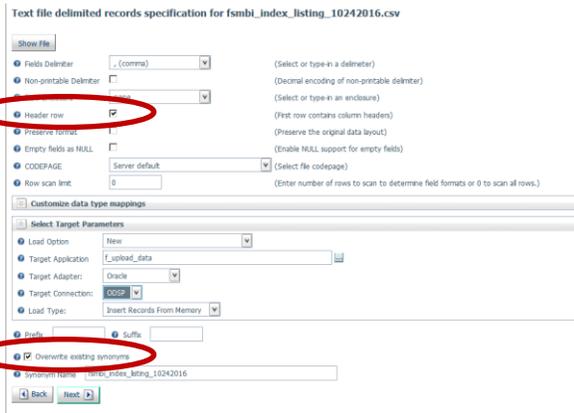
Troubleshooting Uploads

I'm seeing a (FOC1522) error when I try to upload a spreadsheet
If this is a sheet that's been emailed to you or that you have pulled from a shared drive, open it first and click on the Enable Editing button, then save it locally. Saving without opening and clicking on Enable Editing will not remove the protected view that is causing your error.

My report does not return any data when I joined an upload file to an ODS table

Data may only be joined to data of the same type. For example, if your data is in alphanumeric format and you want to join it with data that is in integer format, you must ensure that the format in your upload is an Ax, not an Ix. If your uploaded data is not in the correct format, you must edit the file in Excel and re-upload it. Make sure that the column format is Text. When you re-upload the file, use the same name and be sure to check Overwrite existing synonyms.

I would like to remove the data I have uploaded from public view after I have built my report

Please note, uploading confidential or private data should never be done, even if the file is only available for moments. However, if you would like to remove non-confidential or private data after you have built your report, you may simply re-upload your file. The column headers and sheet name should remain the same, but you may delete all row contents. Your final report will still run if you maintain the sheet name and column headers.

The negative numbers in my spreadsheet are shown as positive values in my InfoAssist report
If the negative numbers in your spreadsheet are formatted using brackets, you must change the format to General, then re-upload the file. Upload Data is not compatible with this formatting.

END