

**Finance Systems Management
Enrollment Management Reporting Team**

Date: 09/13/2018

**Uploading Data in InfoAssist
FSJA-106**

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

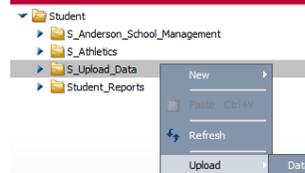
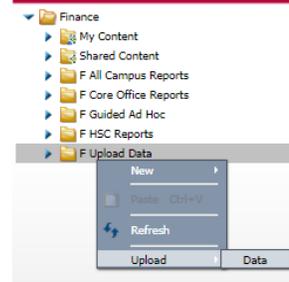
Before you begin, prepare your file for upload:

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. Ensure that upload fields match the datatypes of the fields already in use. For example, for alphanumeric fields (e.g. Finance: Index Code, Banner ID) highlight the column in Excel and change the format to Text to ensure the file uploads with the correct data type. However, for integer fields (e.g. EMRT: Banner ID), changing the datatype to Integer will need to be done during the upload process.
4. To comply with 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.

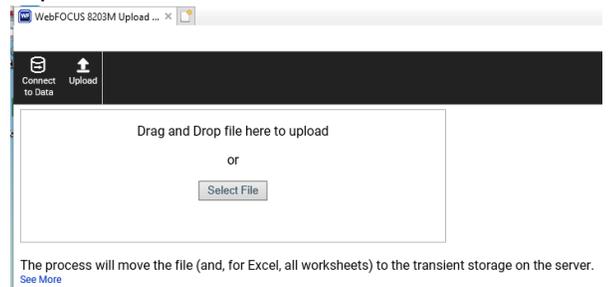
Once you have prepared your file, login to MyReports and follow these steps.

1. These instructions are written for users accessing either the Finance tab or the Student tab. Locate the appropriate upload folder for the tab you are viewing.
Finance → F Upload Data
Student → S_Upload_Data
We will use the generic name “Upload Data folder” throughout this document; please refer to the appropriate folder for your tab, however.

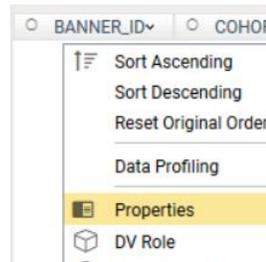


Right click on the Upload Data folder, then select Upload→Data.

2. You may either browse for your upload file using the “Select File” button, or you may drag and drop the file from your desktop or file explorer.



3. Once the data loads, check to make sure that the column data types are correct. For example for integer datatypes (e.g. EMRT: Banner ID), click the down arrow associated with the column and select Properties.



Click the down arrow for Type and select Integer; For Length, change to 8. Click Apply. Usage Format will change to I8 automatically.

Datatypes for other columns may be changed as necessary.

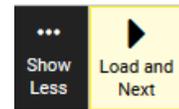
- To check your upload options, click “Load Options” in the top bar. The Synonym Application should reflect the Upload Folder you selected (e.g. f_upload_data or s_upload_data). The Synonym and Table Name should reflect your Excel tab name, but you can change this if desired. Overwrite Existing Synonym should be checked. Then Click OK.

Note: If you have forgotten to change your sheet name, you can do that here by changing the Synonym and Table Name.

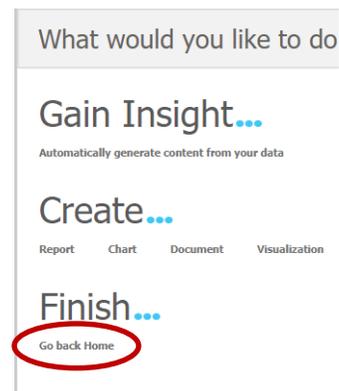
- Click Advanced to review additional options. Generally, you can leave these as the default

values.

- Click “Load and Next” once you are finished.



- If your file loads successfully, you will see the screen below. Click “Go back Home” to return to MyReports.



- You may now create your report using InfoAssist. You can find the uploaded data source by selecting the Upload Data folder (f_upload_data or s_upload_data) 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 differences in the Load Options screen for step 4. See below. Change the Adapter to “Oracle” and check that the connection shows “ODSP”. Be sure that Overwrite existing synonyms is checked.

END

? Load Option: New/Replace
? Adapter: Oracle
? Connection: ODSP
? Synonym Application: f_upload_data
? Synonym: mynetid_index_csv
? Table Name: mynetid_index_csv
? Bulk Load:
? Key columns derived from: No Key
? Overwrite Existing Synonym:
? Apply Filters:

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. If you require assistance with an uploaded file in S_Upload_Data, you may also email emrt@unm.edu

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.