

KK.020.023 - SETTING BUDGET SPREADSHEET PREFERENCES

Purpose	<ul style="list-style-type: none">• To set Spreadsheet preferences in the Control Budget Upload tool.• To identify what parameters may be set in the Control Budget Upload tool
Description	Use this process of Setting Budget Spreadsheet Preferences to enter the institution's business unit. Users are required to set the default business unit because ITS delivers only one version of the Control Budget Upload Tool.
Security Role	BOR PeopleSoft User
Dependencies/ Constraints	A password is needed to update the parameters in the Control Budget Upload Tool. After setting the parameters, clear the contents in the header to load settings.
Additional Information	None

Procedure

Below are step by step instructions on how to setup spreadsheet preferences in the Control Budget Upload Tool.

Step	Action
1.	If this is the first time completing this business process, retrieve spreadsheet document from the BOR Spreadsheet Upload Files on the GeorgiaFIRST website.
2.	Click BOR Spreadsheet Upload Files.
3.	Click OK.
4.	Click BOR Journal Upload.
5.	Open appropriate document for business transaction. <i>Note: For testing purposes use FPLAY and for actual business use, use FPROD.</i>
6.	Click the Set Parameters button.
7.	Enter Password in the Parameters Password field.
8.	Click the OK button.
9.	Click in the Business Unit field.
10.	Enter the institution's specific business unit into the Business Unit field.
11.	Click the Return to Template button.
12.	Click the Clear Contents button.
13.	Click the Save button.