Budget Upload Process

Introduction

CANOPY offers the ability for users to electronically upload Budget spreadsheets for use by FAMIS programs and screens in the Budget process. Spreadsheets are created and uploaded via CANOPY. The files may then be previewed and submitted for processing. Once submitted, the files are posted into the FAMIS Budget Module via FBAU598 during nightly production.

Budget may be uploaded multiple times for the same accounts and/or different account ranges. Multiple files may be uploaded and submitted in one day. These files will be posted in the order they are uploaded.

Use of this feature may minimize data entry mistakes and ensure a timely loading of budget into FAMIS.

Basic Concepts

Budget Bulk Upload may be initiated only after creation of the Member Budget Patterns in FAMIS.

Within CANOPY, you access the process under the FRS tab: Prep Budget, Upload.

General Spreadsheet Requirements:

- Horizontal or Vertical Account Structure is possible
- Category codes must be provided, but can be hidden
- SL Account (6-digit account) must be in a column
- No less than 5 accounts may be loaded at one time – no maximum
- Support Account (5-digit account) must be in the column following the SL
- Support Account may be left blank, contain ‘00000’ or a valid Support Account number
- Only one loadable sheet per workbook

Upload Process Flow
Horizontal Spreadsheet Option

Requirements:

- Categories on one row in the spreadsheet
- Categories must be 3 characters
  - R – Revenue, E – Expense followed by a 2-digit number
  - BEG – Beginning Balance is allowed as a category
- Minimum of 5 categories per spreadsheet

- Format (Color/Font) has no affect on upload
- Hidden rows/columns scanned (Budget Category can be hidden)
- “Total” rows/columns not used in upload
Vertical Spreadsheet Option

Requirements:

- Categories must be 3 characters
  - R – Revenue, E – Expense followed by a 2-digit number
  - BEG – Beginning Balance is allowed as a category
- Minimum of 5 accounts per spreadsheet upload

- Format (Color/Font) has no affect on upload
- Hidden rows/columns scanned (Budget Category can be hidden)
- “Total” rows/columns not used in upload
Upload Steps

- LOGON to CANOPY using your FAMIS ID
- Set your Campus and Fiscal Year – the Fiscal Year will be the current year in FAMIS
- Click on FRS, Prep Budget, Upload

- Click the Upload Button and Browse for your file
- Click Upload Document once you have selected the file
The new file will then appear in the Upload list. Uploaded files can be Previewed and Submitted for processing, or Deleted. Once files are submitted for processing, they can no longer be deleted.

Select the sheet to be processed:

- Choose the sheet in the workbook to be previewed
- Click Continue
Budget Upload Process

Your preview will appear below the Upload section of the page. Verify that information appears as expected. You may change your view of the previewed information by expanding the page size if desired.

Once you have determined the sheet is ready for processing, click the “Submit Document for FY 20xx” button. This will submit the file for processing and notify FAMIS Production Services via e-mail to post the file.

The upload process may take a few moments. When you receive the “File transfer was successful” message, your file has been successfully uploaded for processing.