

## KK.020.023 - SETTING BUDGET SPREADSHEET PREFERENCES

<b>Purpose</b>	<ul style="list-style-type: none"><li>• To set Spreadsheet preferences in the Control Budget Upload tool.</li><li>• To identify what parameters may be set in the Control Budget Upload tool</li></ul>
<b>Description</b>	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.
<b>Security Role</b>	BOR PeopleSoft User
<b>Dependencies/ Constraints</b>	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.
<b>Additional Information</b>	None

## **Procedure**

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

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