

SUNS Quick Reference Guide: Creating a Batch

This quick reference provides step-by-step instructions for you to create and format batch files for uploading into the SUNS application.

Overview	Users will need to create a batch file for uploading that follows the SUNS application Batch File Format v3.0 template. To create a batch, users will need Excel and Notepad. NOTE: It will be beneficial to come up with a naming and filing convention for tracking batches created vs batches submitted that works for your needs.
Create the Excel file	1. Open the Master Batch Template file and use File > Save As to save it with a new name. 2. After saving the template with a new name: 3. Add Detail data on the Details tab. 4. Add Header data on the Header tab. 5. Add Trailer data on the Trailer tab. 6. Save
Create the CSV file	1. After completing the Excel file, make sure you are on the Details tab. 2. Delete the header rows 3. Save the file as a CSV (Comma delimited) file by using the File Save as command and selecting CSV (Comma delimited) under the Save as type dropdown list. This will only allow you to save the worksheet you are on. Note: you can add the Header and Trailer Rows before saving to the CSV but you will have to delete a lot of commas for those rows in the next step.
Create the Notepad file	1. After completing the CSV file, open it using Notepad. 2. If you created your CSV file without adding the Header and Trailer rows: a. Add the header row using spaces not commas. b. Add the trailer row using spaces not commas. The number of records should be the total number of records plus 2 for the header and trailer rows. 3. If you created your CSV file after adding the Header and Trailer rows: a. Replace the commas in the header row with spaces and delete all of the commas at the end of the header row. b. Replace the commas in the trailer row with spaces and delete all of the commas at the end of the trailer row. The number of records should be the total number of records plus 2 for the header and trailer rows. 4. The Record rows will have a lot of additional commas at the end of the row. Do not remove them.



5. If there are additional rows of just commas, delete them.
6. Use File Save As to save the file using the .txt extension. You will have to add .txt to the end of the filename before saving.

Reference

Detailed instructions on creating a batch can be found in ***Appendix F*** of the **SUNS User Guide for Early Childhood**.

Notes: