

SFFRC Quarterly Upload Grantee Instructions

Overview of Cityspan Upload process

1. All uploading agencies should reach out to their **Program Officers and Marbeya** at marbeya@cityspan.com with any questions.
2. For **initial setup**, each uploading agency needs a **Cityspan FTP folder** to securely upload files. If an FTP folder does not exist, please reach out to Marbeya at marbeya@cityspan.com.
3. Download the **“Update Dictionary” in the Custom Reports tab** of the left side bar for Program and Activity Codes
4. Download and fill out the **needed templates from the Documents tab** of the left side bar. This is the document you will use to send your data to Cityspan.
 - a. Child/Youth
 - b. Parent/Caregiver
 - c. Individual Services (if applicable)
 - d. Group Services (If applicable)
5. Once completed, upload files to the Cityspan FTP folder set up for your agency. Email Marbeya at marbeya@cityspan.com.
 - a. **These files should be uploaded by the 15th of the first month of the quarter (for the prior quarter - July, October, January, April)**
6. **Cityspan will review the files.** If there are formatting issues, the program will need to correct the files within 1 week. Once formatted correctly, Cityspan will need 1-2 weeks to review and upload the files.
 - a. If all rows in a file are uploaded successfully, the data upload is complete. Cityspan will notify the program and the program officer.
 - b. If there are issues with rows where required fields are missing or incorrect values are entered, the upload tool will reject the entire row. Cityspan will generate a file of excluded (or rejected) rows for the program to review.
 - c. For exclusion (rejected) files, the program can fix the issues with the rows and ask Cityspan to upload the fixed files. Cityspan will need 1-2 weeks to upload the fixed files.
7. While waiting for Cityspan to upload your files, **complete the performance measure sections and notes of your quarterly report** as best you can so these can be ready to go when the data is uploaded and complete.
8. When you receive notice the upload is complete, you must **review the uploaded data to ensure it is accurate and complete**. Immediately notify Cityspan and your program officer of any issues you find.
9. Once all data is accurate, mark all activities as “Complete”, finish your notes and data in your report and **hit submit**. The **deadline** for quarterly reports for uploading agencies is the **15th of the 2nd month of the quarter** (August, November, February, May).

Instructions

1. Access the Upload Dictionary report via the Custom Reports left menu.

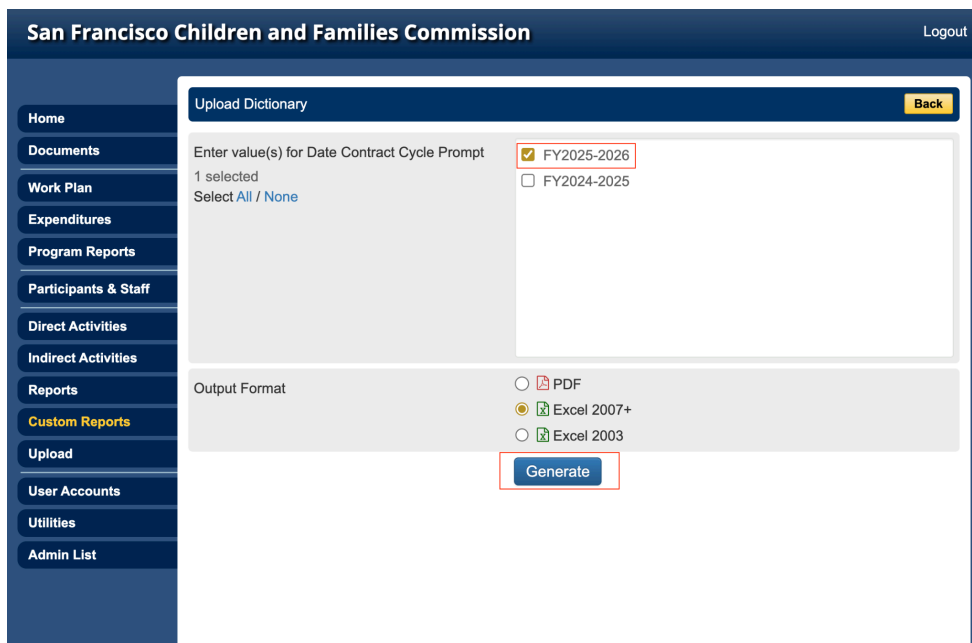
You will use this report to get the Program Code (needed for all uploads) and the Activity IDs (needed only for service uploads).

- After clicking the **Custom Reports** left menu, select the **Upload Dictionary** report.



The screenshot shows the San Francisco Children and Families Commission dashboard. On the left is a navigation menu with items: Home, Documents, Work Plan, Expenditures, Program Reports, Participants & Staff, Direct Activities, Indirect Activities, Reports, Custom Reports (highlighted), Upload, User Accounts, Utilities, and Admin List. The main content area is titled 'Business Objects Reports' and includes a 'Logout' link in the top right. A note states: 'Note: Business objects report data refreshes nightly.' Below this is a search bar labeled 'Search reports'. Under the 'General (1)' category, the 'Upload Dictionary' report is listed and highlighted with a red box.

- Check FY2025-2026 for the Date Contract Cycle Prompt. Select the **Generate** button to run the report. Open the report.



The screenshot shows the 'Upload Dictionary' report form. The left navigation menu is the same as in the previous screenshot. The main content area has a title bar with 'Upload Dictionary' and a 'Back' button. Below the title bar, there is a section for 'Enter value(s) for Date Contract Cycle Prompt'. It shows '1 selected' and 'Select All / None'. Two options are listed: 'FY2025-2026' (checked) and 'FY2024-2025' (unchecked). Below this is a section for 'Output Format' with three radio buttons: 'PDF', 'Excel 2007+' (selected), and 'Excel 2003'. At the bottom, the 'Generate' button is highlighted with a red box.

2. Download the Template and Data Dictionary

- Access the **Templates and Data Dictionaries** via the Documents left menu. Make sure to download the version you need of the **Child/Youth** and **Parent/Caregiver** files (FRC or Early Connections versions).
- If needed, download the **SFFRC_Service Upload Template_FY25-26**. There is only one version of the Services upload for all grantees needing to upload service data.

DOCUMENTS

2025

[Upload a file](#)

FRC version- Parent_Caregivers Data Dictionary_Upload Template 2025-26 (5-5-26)

[FRC version- Parent_Caregivers Data Dictionary_Upload Template 2025-26 \(5-5-26\).xlsx](#) (delete)

FRC version - Child_Youth Data Dictionary_Upload Template 2025-26 (5-5-26)

[FRC version - Child_Youth Data Dictionary_Upload Template 2025-26 \(5-5-26\).xlsx](#) (delete)

Early Connections version - Parent_Caregivers Data Dictionary_Upload Template 2025-26 (5-5-26)

[Early Connections version - Parent_Caregivers Data Dictionary_Upload Template 2025-26 \(5-5-26\).xlsx](#) (delete)

Early Connections version - Child_Youth Data Dictionary_Upload Template 2025-26 (5-5-26)

[Early Connections version - Child_Youth Data Dictionary_Upload Template 2025-26 \(5-5-26\).xlsx](#) (delete)

SFFRC_Service Upload Template_FY25-26

[SFFRC_Service Upload Template_FY25-26.xlsx](#) (delete)

- Save a copy to your computer before making any edits.
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3. Reference the Template and Data Dictionary to know what data to enter

- Reference the **Data Dictionary** tab to see what fields are required and which values to enter. Here is what each column lists.
 - **Label:** this is the field name in Cityspan
 - **Property Name:** this is for Cityspan internal purposes only
 - **Required?:** this column shows which fields are required. If N, the field is optional.
 - Y = Yes
 - N = No
 - Leave empty = this field does not exist on Cityspan for your upload version and should be left empty.
 - **Property type:** this is for Cityspan internal purposes only
 - **Value:** for dropdown fields, enter the value in this column
 - **Value definition:** this describes what value will be entered in Cityspan
 - Note: some fields are conditionally required. For example, the required fields for adding Parent/Caregivers change based on the answer to the following question: "Is this participant attending ONLY a Community Event and/or ONLY a single One-Time Workshop?"
 - Reference the **Sample** tab to see a sample upload file with sample data.
 - Reference the **Template** file to enter your data. This is the only tab that should be made into a file for Cityspan to upload.
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4. Use the Upload Dictionary Report to enter the Program Codes and Activity IDs in your upload files

- Use the **Program Codes** tab to get the Program Code. This is required for all four upload types. The Program Code is the first column in all the upload templates.

	A	B	C
1	<u>Program Codes</u>		
2			
3			
4	Contractor Name	Program	Program Code
5	Demo 1	Demo 1	12345
6	Demo 1	Demo 1	11111

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- Use the **Activity IDs** tab to get the Activity IDs. This is needed only for the grantees' uploading service data (Individual and Group Attendance).

	A	B	C	D
1	<u>Activity IDs</u>			
2				
3				
4	Program	Contractor Name	Activity Name	Activity ID
5	Demo 1	Demo 1	Test 25-26	5481635

5. Follow Formatting Guidelines

- Maintain the original formatting and do not move, delete, or rename any columns on the upload template.
- Avoid using special characters, formulas, or macros.
- Ensure all dates, numbers, and currency fields follow the requested format marked in the **Values** column on the Data dictionary. Other values will **not** be uploaded. If you enter a different value, the entire row will be rejected. For example, for “Zip,” you can enter 4. If you enter “94104,” the row will be rejected.
- If you have multiple Program Codes to upload, please include all the data in one file. For example, if you have Child/Youth records for two Program Codes, list all the data in one file. **Do not** create separate upload files for each Program Code. We will ask you to combine these into one file.

6. File Naming Convention

Save your file using the following recommended format:

[Quarter][ProgramName]_[Upload Type][Upload Version][Date]

Example:

Q3_Demo1_Child_Youth_GeneralTemplate_04-07-2026.xlsx

7. Review Before Uploading to FTP

Before submitting, double-check that:

- All required sections are complete
 - There are no blank required fields
 - Information is accurate and up to date
 - The file opens correctly and is not corrupted
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8. Post your Completed Templates to the FTP folder

- Log in to the FTP.
 - Upload your completed file.
 - Confirm that the correct file has been attached.
 - Email Marbeya@cityspan.com to inform Cityspan that your files are ready to upload. Make sure to CC your Program Officer.
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9. Submission Confirmation

- After uploading, ensure you receive a confirmation message or email.
 - If you do not receive confirmation, please send another reminder.
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10. Cityspan Upload process

- If the files do not follow the correct formatting, we will ask you to fix them before we upload them. Otherwise, if the files are correctly formatted, the Cityspan team will take 1-2 weeks to upload your files.
 - If there are rows rejected, the Cityspan team will let you know that there is an Exclusion file posted to the FTP. Download the Exclusion file to review the rows and reasons rejected.
 - If there are a lot of exclusions (20+), we highly recommend fixing the file as soon as possible and reaching out to Cityspan to upload the fixed files.
 - If there are a few exclusions (fewer than 20), it might be more efficient to manually enter the records.
 - You have 1 week to resubmit corrected line items.
 - TRIPLE CHECK YOUR WORK - Repeated delayed reports, due to your failure to upload correct files, may result in delayed invoicing.
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10. Need Help?

If you experience issues:

- Check the template instructions again
- Try re-saving the file and uploading again
- Contact your Program Officer and Cityspan