

C-BIG Budget Input Training

Agenda

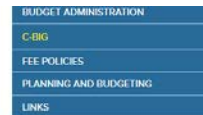
- Budget Season Overview
- Setting up Smart View
- Pull Fund Check Report into Smart View
- Budget Input via Smart View
- Benefits Calculator

Budget Season

- Budget input opens **January 16th** and closes end of day **February 27th**
- No approvals within C-BIG system – please work with your supervisors for an approval process
- Encouraged to use the Excel add-in, Smart View
 - Allows users to complete the budget input process, retrieve reports, and perform ad-hoc analysis in Excel

Smart View Installation

1. Download Smart View installation file
2. Open folder containing file
3. Right-click and select "Run as Administrator"
4. Once installed, open Excel



Application Links

[Link to Prior \(Updated\) C-BIG Interface](#)

[Link to New C-BIG Interface](#)

Note: If you receive an error while trying to view a report, please log in to the Prior C-BIG interface, go to File > Preferences > Financial Reporting. Under "User Point of View", click the option for "On".

Recommended Browser: Firefox ESR ([Extended Support Release](#)). Once Firefox ESR has been installed, please add the Remote XUL Manager Add-on using these [Setup Instructions](#).

Install Smart View

Smart View is an add-on that will allow users to complete the budget input process, retrieve reports, and perform ad-hoc analysis in Excel. Please refer to any of the Smart View training manuals on this page for installation instructions, or reach out to [Cathy Song](#).

[Download Smart View](#)

Note: If you have an older version of Smart View, you may need to uninstall it before installing the new version. When installing, please be sure to right-click the file and click "Run As Administrator".

About C-BIG

The Campus Budget Information Gateway (C-BIG) serves as UCLA's strategic budgeting and management reporting tool. It is built on Oracle Hyperion Planning software and is designed for budget input and review, as well as actuals reporting and analysis.

C-BIG Resources

[Budget Input via Smart View Training Manual](#)
[Formatted Reports via Smart View Training Manual](#)
[Ad Hoc Reporting via Smart View Training Manual](#)
[Formatted Reports via Web App Training Manual](#)
[Reports Directory](#)

[FY2017-18 Budget Guidelines Presentation](#)
[FY2017-18 Budget Input Reminders](#)
[FY2017-18 C-BIG Training Presentation](#)

Mapping Tables

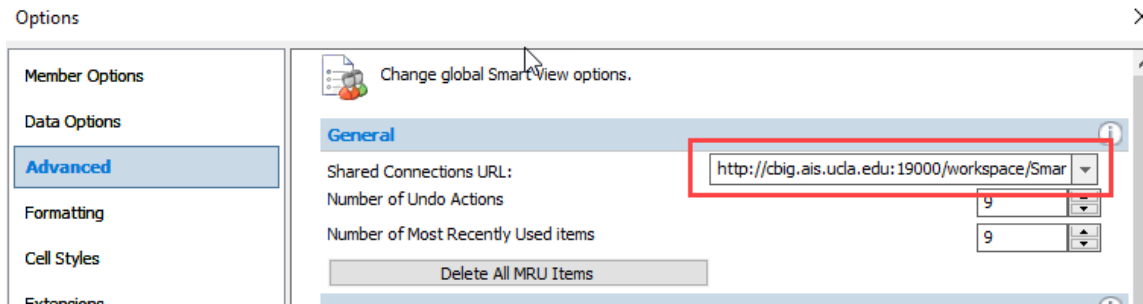
[Object Table](#)
[Fund Table](#)
[Total and Core Funds Table](#)

Set Smart View Options

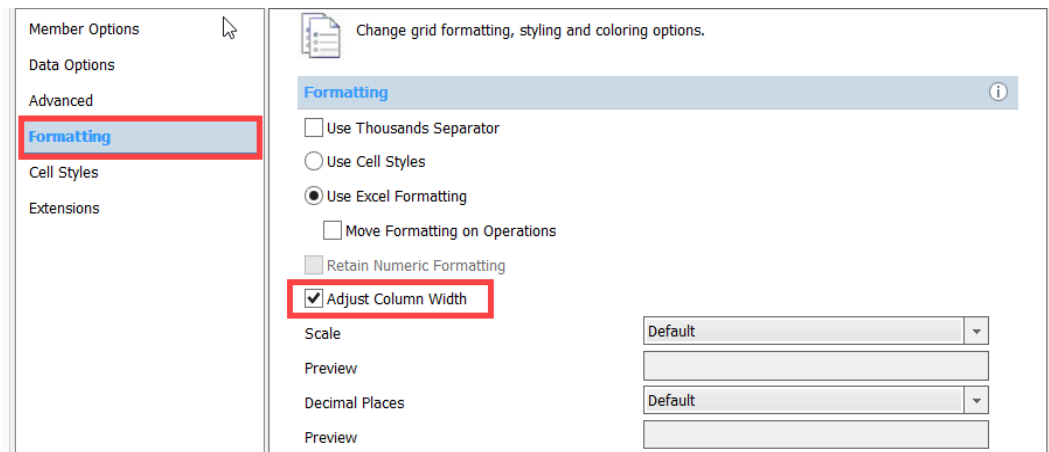
Smart View tab > Options > Advanced > Shared Connections URL

<http://cbig.ais.ucla.edu:19000/workspace/SmartViewProviders>

Note: This URL will change in January!



In Options, go to **Formatting** and check **Adjust Column Widths**

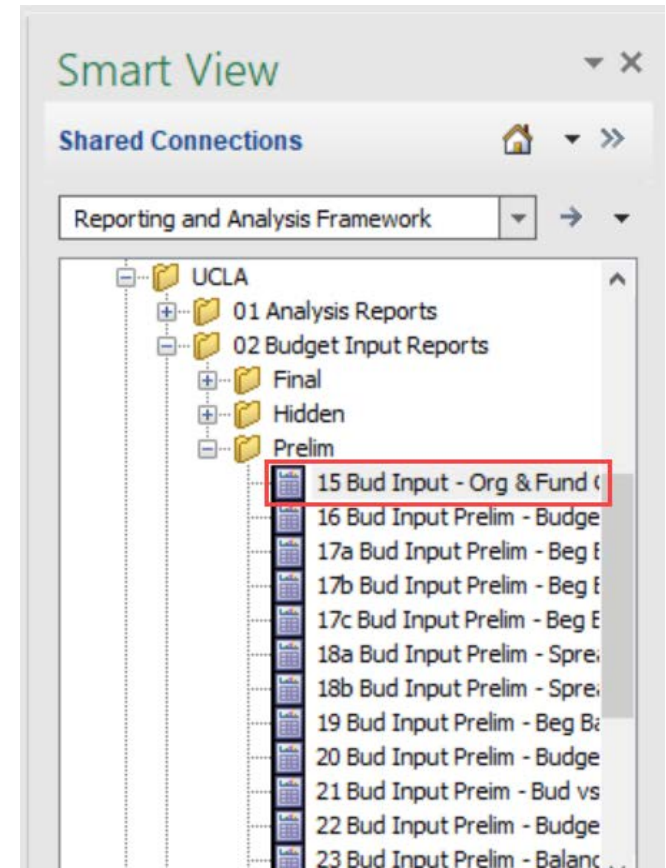


Open Fund Check Report

Path to report:

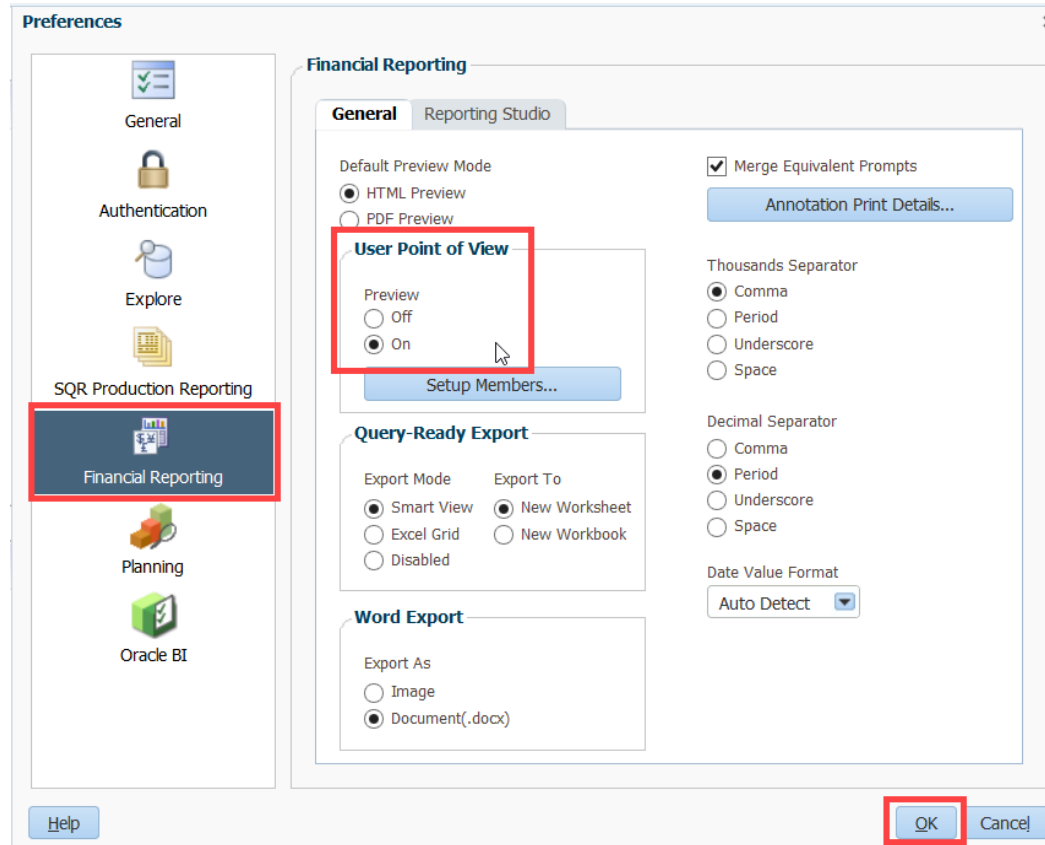
1. Shared Connections
2. Reporting and Analysis Framework
3. UCLA > 02 Budget Input Reports > Prelim
4. **15 Bud Input – Org & Fund Check**

- The report will show all funds that were used in FY 2016-17 and FY 2017-18
- Check back to this report during budget season to see what funds do not have budget data for FY 2018-19



If you receive an error while opening a report...

Log into **Prior C-BIG Interface** (link found on C-BIG website), go to **File > Preferences**

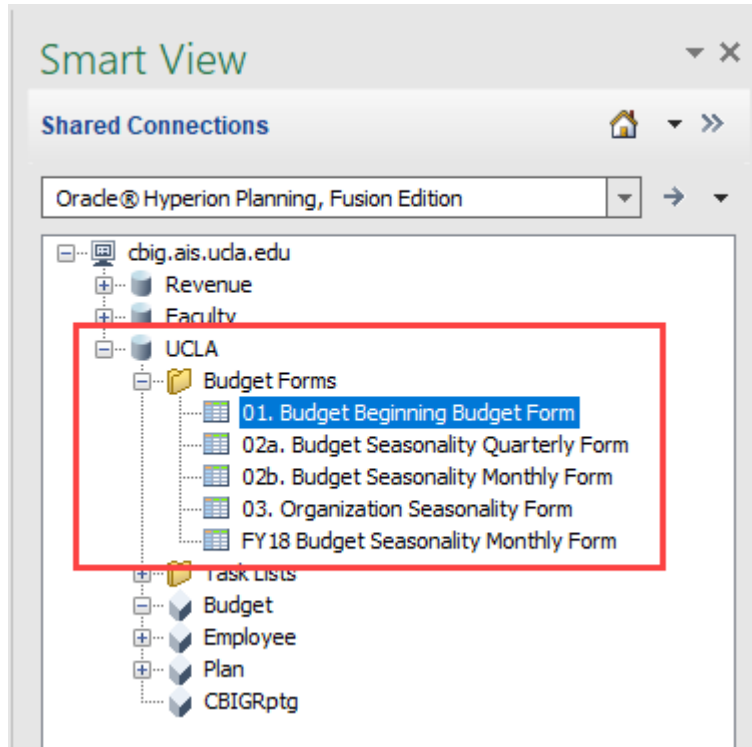


DEMO

Input Forms

- New **Forecast (Jan:Jun)** and **Actual + Forecast** columns in the Beginning Budget Input form
 - APB to load Forecast for Jan through June – users may edit as needed
- Budget Seasonality form the same
- Be sure to select a Department and Fund combination to input data, otherwise the form will be read-only (grayed out)

Navigating to Input Forms



Path to forms:

1. Shared Connections
2. Oracle Hyperion Planning, Fusion Edition
3. UCLA
4. Budget Forms
5. **01 Budget Beginning Budget Form & 02 Budget Seasonality Form** (quarterly or monthly)

Selecting Dept and Fund

1. Click in the department or fund drop-down menu
2. Type one or more characters (alphanumeric) of the department or fund name for which you are searching
3. Make your selection and then **be sure to click Refresh after**

The screenshot shows a web-based budget form titled "POV 01. Budget Beginning Budget Form - adminbud.it.ucla.edu UCLA 1". The form includes a dropdown menu for "ACADEMIC PLANNING & BUDGET (3815)" with the text "general Funds" entered. A "Refresh" button is located to the right of the dropdown. A search results list is displayed below the dropdown, enclosed in a red box. The list includes the following items:

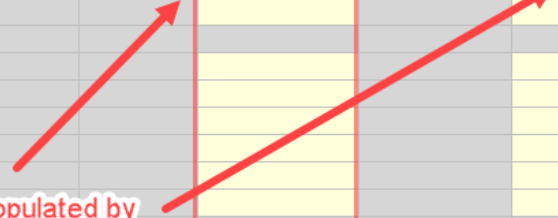
- General Funds
- GENERAL FUNDS-ACADEMIC SENATE GRANTS (19914)
- GENERAL FUNDS-IUCRP BIOTECHNOLOGY (19915)
- GENERAL FUNDS-NRT GRAD & UNDERGRAD (19942)
- GENERAL FUNDS-NRT GRADUATE ACADEMIC (19943)
- GENERAL FUNDS-NRT GRADUATE PROFESSIONAL (19944)
- GENERAL FUNDS-STIP INCOME (19901)
- GENERAL FUNDS (19900)
- General Funds (UCLA)
- GENERAL LIABILITY PROGRAM-UCOP (69907)

The background of the screenshot shows a spreadsheet interface with columns labeled "FY 20", "Actual", "Year", "FY 2015-16", "ber", "Novem", "201", and "27". The spreadsheet rows include "1", "3", "4", "5", "6", "7", and "8". The row "6" is highlighted in blue and contains the text "Temp Approp". The row "7" contains the text "-Total Revenue".

Beginning Budget Form

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		FY 2016-17	FY 2017-18										FY 2018-19	
3		Actual	Approved Budget	Actual						Forecast (Jan:Jun)	Actual + Forecast	Beg Budget		
4		YearTotal	YearTotal	July	August	September	October	November	December	YTD (Jul:Dec)	June	YearTotal	BegBalance	
5	Perm Approp													
6	Temp Approp													
7	-Total Revenue													
8	Faculty Ladder													
9	Faculty Temporary													
10	Academic Apprentice													
11	Academic Other													
12	Career Staff													
13	Non-Career Staff													
14	-Total Salaries & Wages													
15	Medical (Health/Dental/Vision)													
16	UCRS (Employer Contribution)													
17	All Other Benefits													
18	CBR													
19	-Subtotal Benefits													
20	Fee Remissions													
21	Fee Remissions Adjustments													
22	-Total Benefits													
23	-Total Compensation													
24	Material and Supplies - General													
25	Material and Supplies - Scientific													
26	Communications													
27	Travel and Entertainment													
28	Services													
29	Consultants/Temp. Services													
30	Information Technology													
31	Equipment (non computer)													
32	Operation and Maintenance of Space													
33	Student Support - Underg & Grad													
34	Other Expense - Control													
35	Reserves for Auxiliaries													
36	Indirect Cost Recovery													
37	-Total Operating Expenses													
38	-Total Compensation and Operating													
39	Recharges													
40	-Total Expenditures													
41	-Surplus/(Deficit)													
42	Carryforward													
43	Ending Balance													
44														

To be pre-populated by APB, open for editing



Beginning Budget Form

	A	B	C	D	E	F	G	H	I	J	K	L	M
1		FY 2016-17	FY 2017-18										FY 2018-19
3		Actual	Approved Budget	Actual						Forecast (Jan:Jun)	Actual + Forecast	Beg Budget	
4		YearTotal	YearTotal	July	August	September	October	November	December	YTD (Jul:Dec)	June	YearTotal	BegBalance
5	Perm Approp												
6	Temp Approp												
7	-Total Revenue												
8	Faculty Ladder												
9	Faculty Temporary												
10	Academic Apprentice												
11	Academic Other												
12	Career Staff												
13	Non-Career Staff												
14	-Total Salaries & Wages												
15	Medical (Health/Dental/												
16	UCRS (Employer Contribu												
17	All Other Benefits												
18	CBR												
19	-Subtotal Benefits												
20	Fee Remissions												
21	Fee Remissions Adjustme												
22	-Total Benefits												
23	-Total Compensation												
24	Material and Supplies - Gen												
25	Material and Supplies - Scie												
26	Communications												
27	Travel and Entertainment												
28	Services												
29	Consultants/Temp. Services												
30	Information Technology												
31	Equipment (non computer)												
32	Operation and Maintenance of Space												
33	Student Support - Underg & Grad												
34	Other Expense - Control												
35	Reserves for Auxiliaries												
36	Indirect Cost Recovery												
37	-Total Operating Expenses												
38	-Total Compensation and Operating												
39	Recharges												

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- Cut
- Copy
- Paste Options:
 - Paste Special...
 - Smart Lookup
 - Insert...
 - Delete...
 - Clear Contents
 - Quick Analysis
 - Filter
 - Sort
 - Insert Comment
 - Format Cells...
 - Pick From Drop-down List...
 - Define Name...
 - Hyperlink...
 - Smart View
 - Expand/Collapse
 - Drill-through
 - Options...
 - Copy FY16-17 Actuals
 - Copy FY17-18 Approved Budget
 - Roll-Up Calc (Optional)

Note: The Copy rules will apply to all rows, with the exception of Benefits and Carryforward

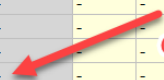
Budget Seasonality Form

	A ↓	B	C	D	E	F	G	H	I	J	N	R	V	Z	AA	AB
2	FY 2017-18														FY18 vs FY17 Budget	
3	BegBalance								To-Be-Spread	YearTotal	+Q1	+Q2	+Q3	+Q4	\$ Variance	% Variance
4	Beg Budget	Adjustments	Budget Cuts	Program Chgs	Chanc. Commit.	Range/Merit/Infl.	Total	Budget	Budget	Budget	Budget	Budget	Budget	Proposed Budget	Proposed Budget	
5	Perm Approp	-	-	-	-	-	-	-	-	-	-	-	-	-	-1406313	-100
6	Temp Approp	-	-	-	-	-	-	-	-	-	-	-	-	-	44077	-100
7	-Total Revenue	-	-	-	-	-	-	-	-	-	-	-	-	-	-1362236	-100
8	Faculty Ladder	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
9	Faculty Temporary	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
10	Academic Apprentice	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
11	Academic Other	-	-	-	-	-	-	180117	180117	-	-	-	-	-	-184048	-100
12	Career Staff	-	-	-	-	-	-	521975	521975	-	-	-	-	-	-768146	-100
13	Non-Career Staff	-1207	-	-	-	-	-1207	-1207	-1207	-	-	-	-	-	0	0
14	-Total Salaries & Wages	700885	-	-	-	-	700885	700885	700885	-	-	-	-	-	-952194	-100
15	Medical (Health/Dental/Vision)	73242	-	-	-	-	73242	73242	73242	-	-	-	-	-	-151728	-100
16	UCRS (Employer Contribution)	90833	-	-	-	-	90833	90833	90833	-	-	-	-	-	-127094	-100
17	All Other Benefits	78725	-	-	-	-	78725	78725	78725	-	-	-	-	-	-114475	-100
18	CBR	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
19	-Subtotal Benefits	242801	-	-	-	-	242801	242801	242801	-	-	-	-	-	-393296	-100
20	Fee Remissions	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
21	-Total Benefits	242801	-	-	-	-	242801	242801	242801	-	-	-	-	-	-393296	-100
22	-Total Compensation	943685	-	-	-	-	943685	943685	943685	-	-	-	-	-	-1345491	-100
23	Material and Supplies - General	268	-	-	-	-	268	268	268	-	-	-	-	-	0	0
24	Material and Supplies - Scientific	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
25	Communications	2647	-	-	-	-	2647	2647	2647	-	-	-	-	-	-5442	-100
26	Travel and Entertainment	2439	-	-	-	-	2439	2439	2439	-	-	-	-	-	0	0
27	Services	36296	-	-	-	-	36296	36296	36296	-	-	-	-	-	-14092	-100
28	Consultants/Temp. Services	30155	-	-	-	-	30155	30155	30155	-	-	-	-	-	0	0
29	Information Technology	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
30	Equipment (non computer)	-	-	-	-	-	-	-	-	-	-	-	-	-	0	0
31	Operation and Maintenance of Space	302483	-	-	-	-	302483	302483	302483	-	-	-	-	-	0	0

Last column from the Beginning Budget Form

Adjustments to Beginning Budget

Amount to be spread in Quarters/Months



Budget Seasonality Form

Material and Supplies - General																
	A	B	C	D	E	F	G	H	I	J	N	R	V	Z	AA	AB
	FY 2018-19										FY19 vs FY18 Budget					
	BegBalance					To-Be-Spread	YearTotal	+Q1	+Q2	+Q3	+Q4	\$ Variance	% Variance			
	Beg Budget	Adjustments	Budget Cuts	Program Chgs	Chanc. Commit.	Range/Merit/Infl.	Total	Budget	Budget	Budget	Budget	Budget	Proposed Budget	Proposed Budget		
2																
3																
4																
5	Perm Appro															0
6	Temp Appro															0
7	-Total Revenue															0
8	Faculty															0
9	Faculty															0
10	Acade															0
11	Acade															0
12	Career															0
13	Non-C															0
14	-Total S															0
15	Med															0
16	UCRS															0
17	All C															0
18	CBR															0
19	-Subt															0
20	Fee R															0
21	Fee R															0
22	-Total B															0
23	-Total Co															0
24	Material															0
25	Material															0
26	Commu															0
27	Travel a															0
28	Services															0
29	Consultants/Temp. Services															0
30	Information Technology															0
31	Equipment (non computer)															0
32	Operation and Maintenance of Space															0
33	Student Support - Underg & Grad															0
34	Other Expense - Control															0

Note: Spread rules will apply to the rows you right-click into, if applied to a parent member, children will be included

Inputting & Submitting Data

- Writeable cells are light yellow
- Unsaved cells are darker yellow
- Click **Submit Data** to save changes
- To cancel changes, click **Refresh** then **OK**

The screenshot displays the Oracle Hyperion Smart View for Office, Fusion Edition interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Smart View, and Planning. The 'Data' tab is active, with the 'Submit Data' button highlighted in a red box. Below the ribbon, the 'POV 01. Budget Beginning Budget Form - cbig.ais.ucla.edu_UCLA_1' is shown with filters for 'DELETE (3825)' and 'GENERAL FUNDS (19900)'. A warning dialog box is open, stating: 'This form contains unsaved data. Select OK to continue without saving data, or Cancel to cancel this operation.' The dialog has 'OK' and 'Cancel' buttons. In the background, a spreadsheet is visible with columns A through M. Column M contains the value '3852741' in a light yellow cell. The spreadsheet rows include 'FY 2016-17', 'Actual', 'Approv', 'YearTotal', 'YearTo', 'Perm Approp', 'Temp Approp', '-Total Revenue', 'Faculty Ladder', 'Faculty Temporary', 'Academic Apprentice', 'Academic Other', and 'Career Staff'.

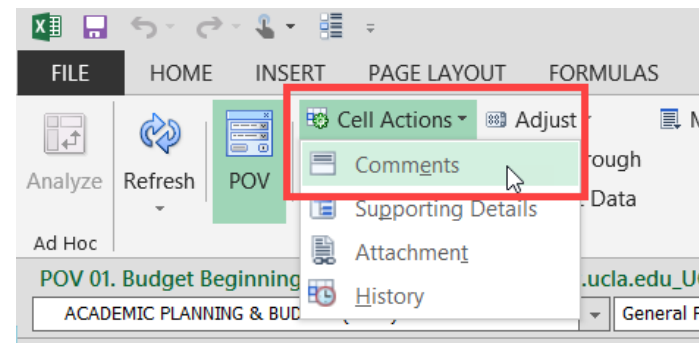
	A	B		L	M
1		FY 2016-17			FY 2018-19
3		Actual	Approv	Actual + Forecast	Beg Budget
4		YearTotal	YearTo	YearTotal	BegBalance
5	Perm Approp				3852741
6	Temp Approp				
7	-Total Revenue				
8	Faculty Ladder				
9	Faculty Temporary				
10	Academic Apprentice				
11	Academic Other				
12	Career Staff				

DEMO

Supporting Details & Cell Comments

- Supporting Details are used to provide more detail behind a number
- Select a single cell or a row of contiguous cells
- Click on **Cell Actions > Supporting Details** from the Planning ribbon
- **Blue highlighted cell** indicates there are Supporting Details

- To add Cell Comments, select a single cell or a range of contiguous cells
- Click on **Cell Actions > Comments** from the Planning ribbon



- **Blue outline around cell** indicates there is a comment

DEMO

Resources

<http://www.apb.ucla.edu/resource-management/c-big>

Budget Input via Smart View Training Manual

Budget Input Reminders Cheat Sheet

Budget Guidelines Presentation *[available in Jan]*

Thank You!

Cathy Son

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