

# WEB APPLICATION TRAINING GUIDE

**Opening C-BIG Reports on the Web or in PDF** 

Office of Academic Planning & Budget Updated February 2018

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# **C-BIG** Reports

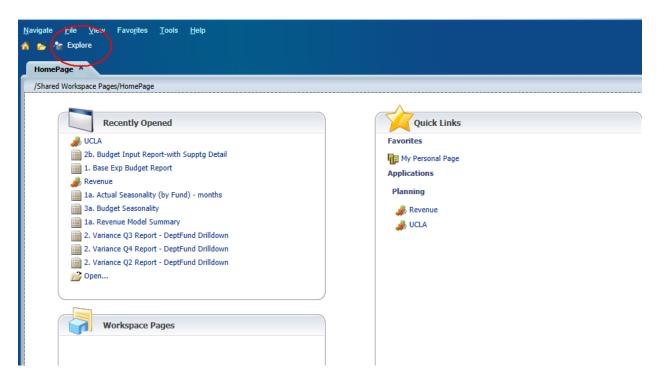
C-BIG reports are standardized reports that pull the live data within the C-BIG database. Requests for additional reports may be emailed to Cathy Son at <a href="mailto:cson@ponet.ucla.edu">cson@ponet.ucla.edu</a> and depending on the report requirements, new reports can be made available throughout the year.

Reports can also be pulled into Excel through Smart View. See separate user manual on the C-BIG webpage.

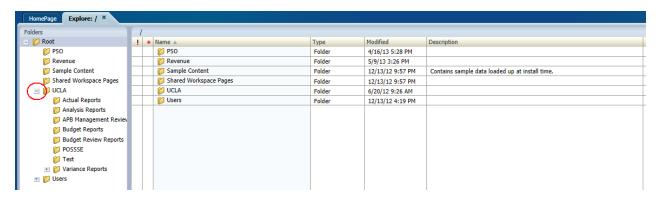
# Accessing Reports on the Web

To pull reports from Workspace,

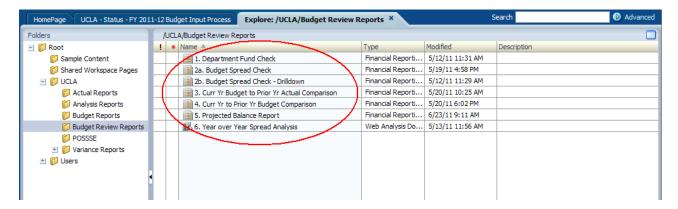
- 1. Go to the C-BIG application: <a href="https://finbud.it.ucla.edu/workspace/index.jsp">https://finbud.it.ucla.edu/workspace/index.jsp</a>
- 2. Click on the Explore shortcut from the toolbar:



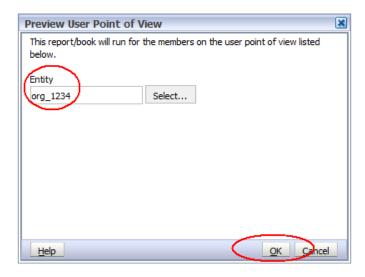
3. Expand the **UCLA** folder to view the subfolders:



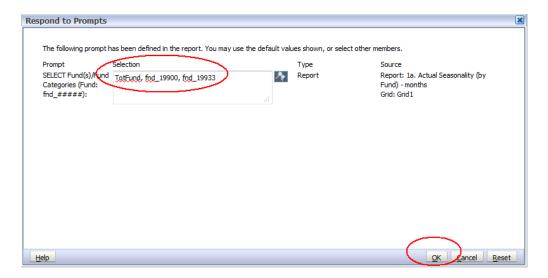
4. To access a report, click on the folder from the left pane, and double-click on the desired report (defaults to HTML view) OR right-click the report and click **Open** > **Open in PDF**.



5. At the *Preview User Point of View* prompt, enter and/or confirm your Entity selection. Your Entity selection should be in the following format: org\_####, div\_####, sdv\_####, dpt\_####, or acc\_######(-##). To confirm the selection, click on the **OK** button. Use the **Select** button to view and select all available funds.



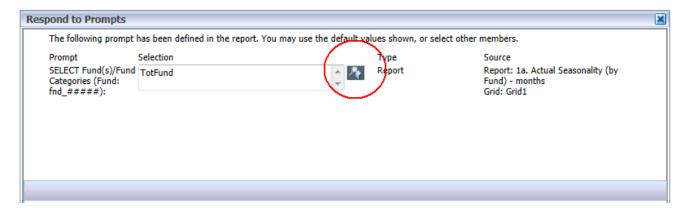
6. At the next Respond to Prompts window, confirm or change the default selection.



7. Many of the prompts, as the one shown above, ask you to confirm the Fund selection. If the default selection is correct, click on the **OK** button. If you would like to change the selection, type in the appropriate Fund selection(s) using the following format: fnd\_####. For multiple selections, place a comma in between each selection (e.g., fnd\_19900, fnd\_69996, fnd\_70000). Click on the **OK** button at the bottom when your selection is complete.

It is always simplest to type directly into the selection prompt; however, at times, you may want to browse the available selections, and will need to use the search feature to identify your selections.

8. To search for specific funds or fund categories, click on the **2** icon.

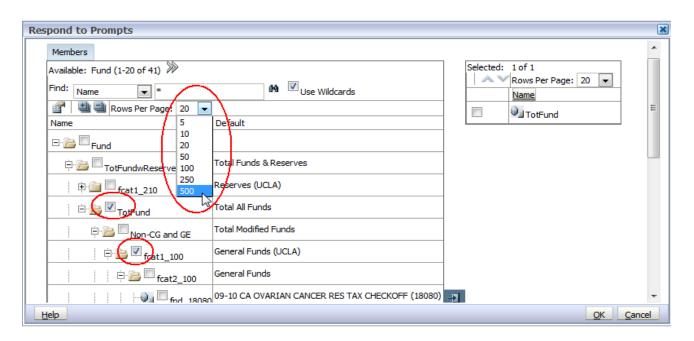


Option 1: Expanding the Hierarchy

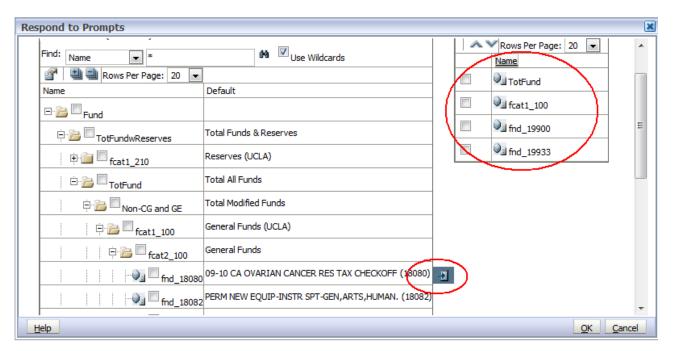
 Expand the Fund or Entity hierarchy and place check marks to the left of the funds, fund categories, or entities that you would like to select.



To view the hierarchy on fewer screens as opposed to several pages, change the *Rows Per Page* from 25 to 100, 250, or 500:

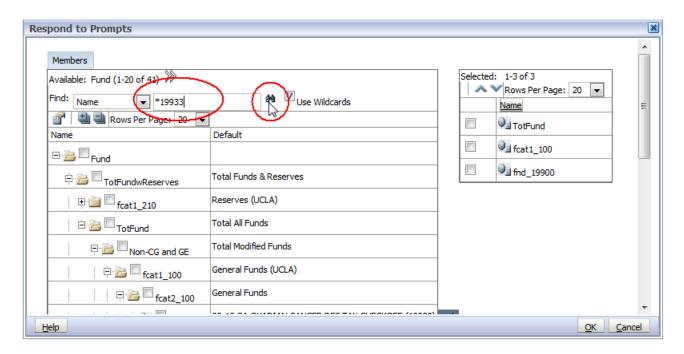


Click on the button to move your selections to the right. To remove items previously selected, place check marks to the left of the items on the right and use the button to de-select.



#### Option 2: Using the Find Feature

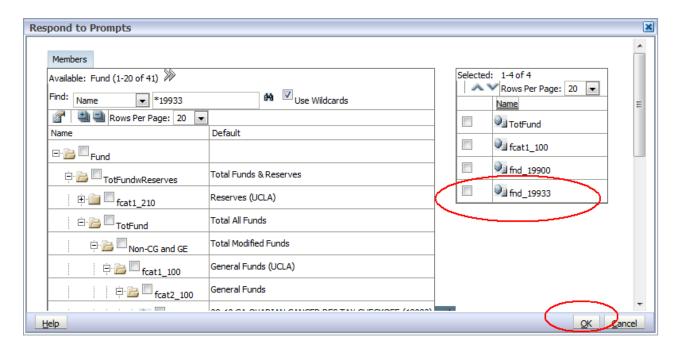
Place your curser to the right of the asterisk (\*) in the *Find* row, type in the fund number, click on the icon to the right, and click on the **OK** button.



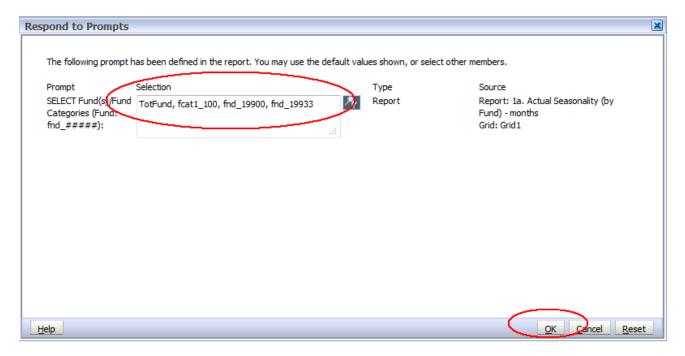
☐ The system will search for your selection. Place a check mark to the left of your selection and click on the **OK** button:



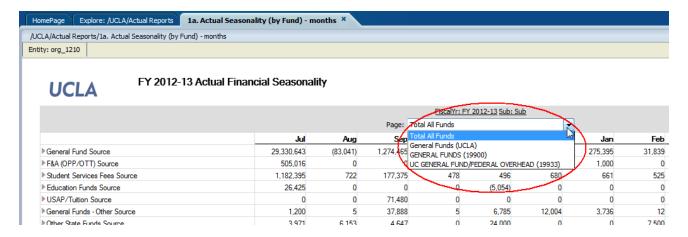
Once complete, click on the **OK** button on the bottom right of the screen:



□ Confirm the prompt by clicking on the **OK** button:



The selected report will generate in HTML format for the funds/fund categories indicated.



The HTML versions of some reports provide you with the flexibility to change some of the dimension selections, such as *Fund*, *Entity*, *Version*, and/or *FiscalYr*.



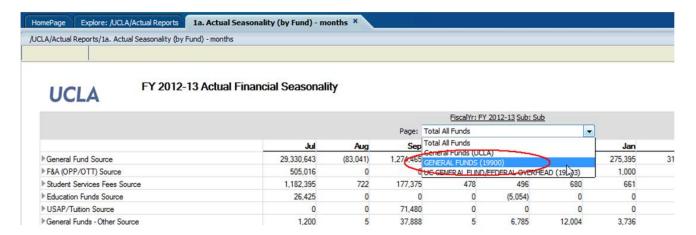
If you selected the PDF view for your report, a different page will generate for each fund selected.

### Page Selection

In this example, the Fund dimension is represented in the *Page* area of the report.

To change the report view to another selected fund/fund category,

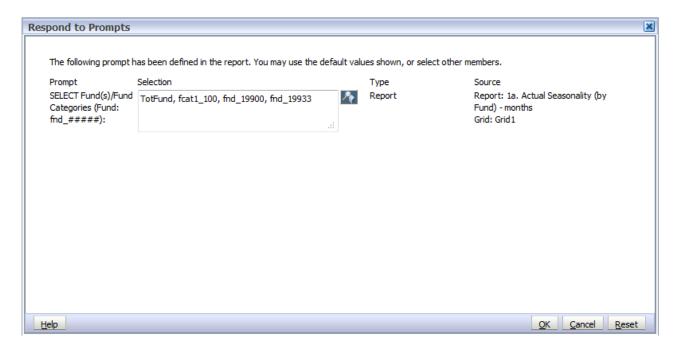
1. Click on the *Page* drop-down menu and select a fund/fund category from the list:



2. To add or change the selections within the drop-down box, click on the **Respond to Prompts** link from the View menu:



This will re-activate the *Respond to Prompts* windows with your current selections, and allow you to change your selections using the steps described above.



#### Points of View

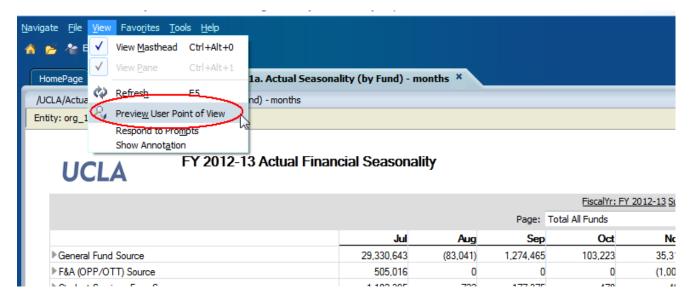
In addition to the Page Selection, reports may also contain POV's (Points of View). There are two types of POV's:

- 1. User POV
- 2. Grid POV

#### **User POV:**

If the report has been defined with a User POV, the dimension will be located in the upper left of the report window. For many of the reports, the Entity dimension is in the *User POV*. The first time you access the report, the Entity may default to *Entity* and you will need to select your department, sub-division, division, or organization from the hierarchy. Your selection will be remembered the next time you open the report.

1. To change the report to your organization, division, sub-division, or department, click on **Preview User Point** of View from the left View menu:

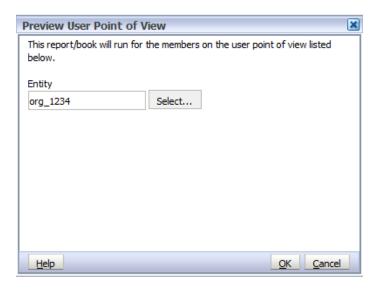


This will reactivate the Entity selection window with your current selection.

2. Change your selection by typing in your organization, division, sub-division, or department (format: org\_####, div\_####, sdv\_####, dpt\_####). Click on the **OK** button when complete.



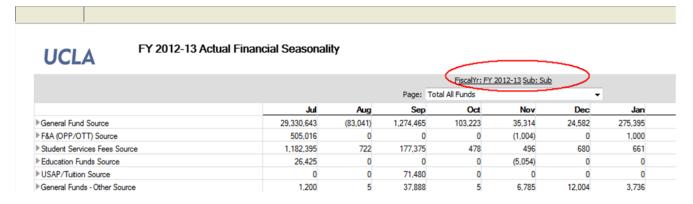
Only one selection can be generated at a time for the User POV.



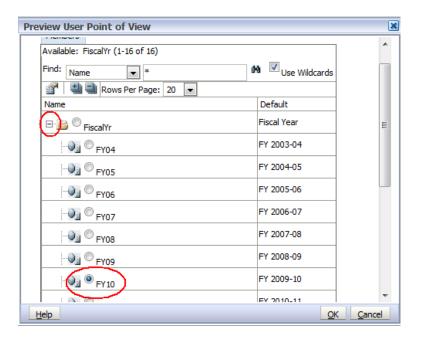
#### **Grid POV:**

Reports may also have default Grid POV's. In the report screenshot below, FiscalYr: FY 2012-13 and Sub: TotSub are contained in the Grid POV.

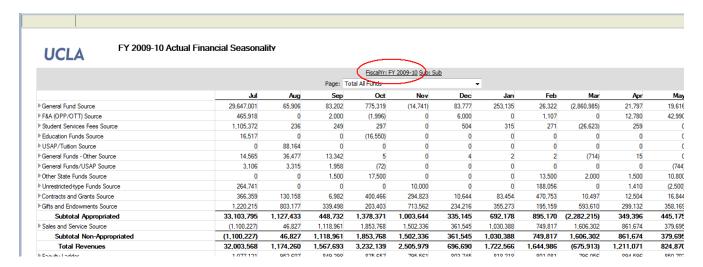
- **& & UCLACurBudYr** may appear in some reports as the FiscalYr. This is a variable and refers to the current budget year.
- ➤ If the dimension in the *Grid POV* is underlined, this indicates that the user can change the selection.
- 3. To change the Grid POV selections, click on one of the underlined dimensions:



4. At the Member Selection screen, expand the hierarchy and click on the radio button to the left of your selection and click on the **OK** button:



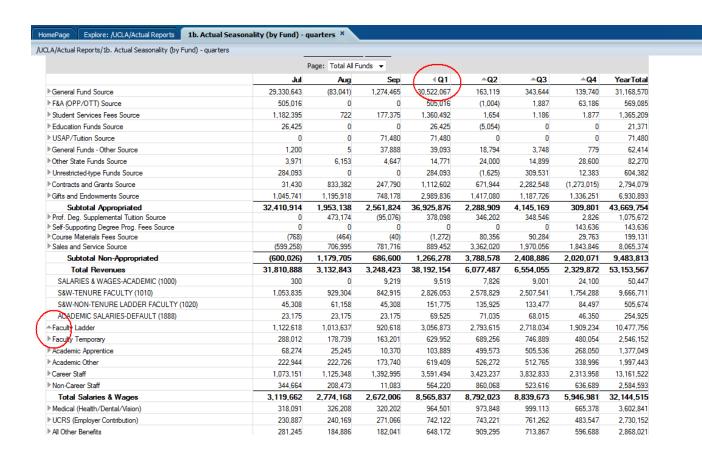
The report will generate for your selection:



## Expansion

Several reports allow you to drill down to further details. If a column or row is expandable, an arrow will appear to the left of the dimension selection. You can click on the arrow to drill.

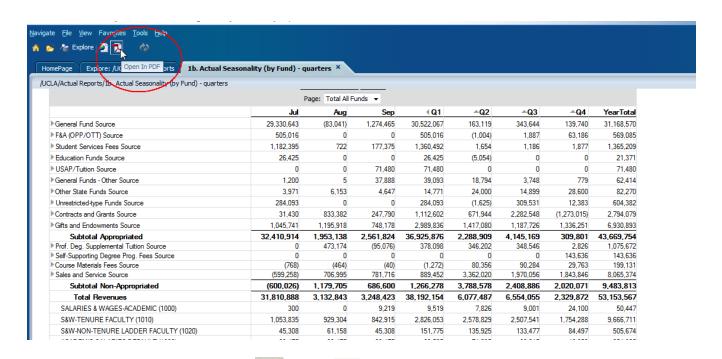
In the example below, *General Fund Source* has been expanded in the row, and *Q1* has been expanded in the column. Expanding the expense categories will show the object code details.



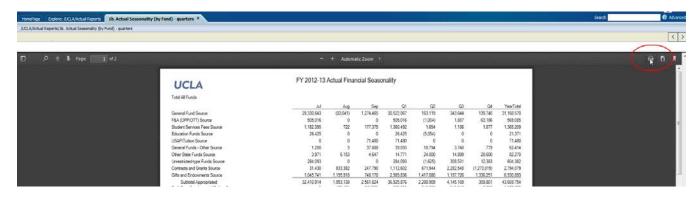
### Printing Reports

Reports can be opened in HTML or PDF.

- Open in HTML allows the user to change the Page Selections, User POV, or Grid POV.
- Open in PDF printer-ready formatted reports.
- 5. To print your reports, click on the **Open in PDF** link from the toolbar.



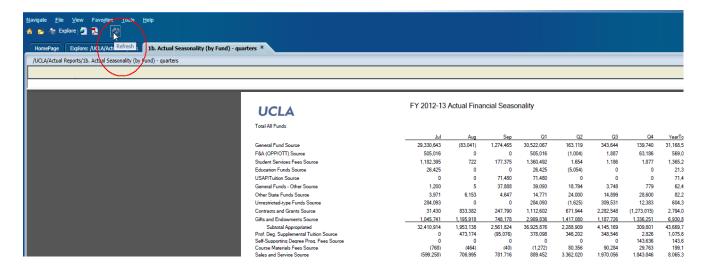
6. Use the icons within the report to Save or Print the report. Depending on your browser and computer settings, the option can be found in different locations.



UCLA	FY 2012-13	Actual Fina	ncial Seaso	onality				
Total All Funds								
	Jul	Aug	Sep	Q1	Q2	Q3	Q4	YearTotal
General Fund Source	29,330,643	(83,041)	1,274,465	30,522,067	163,119	343,644	139,740	31,168,570
F&A (OPP/OTT) Source	505,016	0	0	505,016	(1,004)	1,887	63,186	569,085
Student Services Fees Source	1,182,395	722	177,375	1,360,492	1,654	1,186	1,877	1,365,209
Education Funds Source	26,425	0	0	26,425	(5,054)	0	0	21,371
USAP/Tuition Source	0	0	71,480	71,480	0	0	0	71,480
General Funds - Other Source	1,200	5	37,888	39,093	18,794	3,748	779	62,414
Other State Funds Source	3,971	6,153	4,647	14,771	24,000	14,899	28,600	82,270
Unrestricted-type Funds Source	284,093	0	0	284,093	(1,625)	309,531	12,383	604,382
Contracts and Grants Source	31,430	833,382	247,790	1,112,602	671,944	2,282,548	(1,273,015)	2,794,079
Gifts and Endowments Source	1,045,741	1,195,918	748,178	2,989,836	1,417,080	1,187,726	1,336,251	6,930,893
Subtotal Appropriated	32,410,914	1,953,138	2,561,824	36,925,876	2,288,909	4,145,169	309,801	43,669,754
Prof. Deg. Supplemental Tuition Source	0	473,174	(95,076)	378,098	346,202	348,546	2,826	1,075,672
Self-Supporting Degree Prog. Fees Source Course Materials Fees Source	0 (768)	(464)	(40)	(1,272)	0 80.356	0 90.284	143,636 29.763	143,636 199,131
Sales and Service Source	(599,258)	706,995	781,716	889,452	3,362,020	1,970,056	1,843,846	8.065.374
Subtotal Non-Appropriated	(600,026)	1,179,705	686,600	1.266.278	3.788.578	2.408.886	2.020.071	9,483,813
Total Revenues	31.810.888	3.132.843	3.248.423	38.192.154	6.077.487	6.554.055	2.329.872	53.153.567
SALARIES & WAGES-ACADEMIC (1000)	300	0	9,219	9,519	7.826	9.001	24.100	50.447
S&W-TENURE FACULTY (1010)	1.053.835	929.304	842.915	2.826.053	2.578.829	2.507.541	1.754.288	9.666.711
S&W-NON-TENURE LADDER FACULTY (1020)	45.308	61.158	45.308	151.775	135.925	133.477	84.497	505.674
ACADEMIC SALARIES-DEFAULT (1888)	23.175	23.175	23.175	69.525	71.035	68.015	46.350	254.925
Faculty Ladder	1,122,618	1.013.637	920.618	3.056.873	2,793,615	2,718,034	1.909.234	10.477.756
Faculty Temporary	288 012	178.739	163,201	629.952	689.256	746.889	480 054	2 546 152
Academic Apprentice	68.274	25.245	10.370	103.889	499.573	505.536	268 050	1.377.049
Academic Other	222.944	222.726	173.740	619.409	526.272	512.765	338.996	1.997.443
Career Staff	1.073.151	1.125.348	1.392.995	3.591.494	3.423.237	3.832.833	2.313.958	13.161.522
Non-Career Staff	344.664	208.473	11.083	564.220	860.068	523,616	636.689	2.584.593
Total Salaries & Wages	3.119.662	2.774.168	2.672.006	8.565.837	8.792.023	8.839.673	5.946.981	32.144.515
Medical (Health/Dental/Vision)	318.091	326.208	320.202	964.501	973.848	999.113	665.378	3.602.841
UCRS (Employer Contribution)	230.887	240.169	271.066	742.122	743,221	761.262	483.547	2,730,152
All Other Benefits	281.245	184.886	182.041	648.172	909.295	713.867	596.688	2,868,021
Subtotal Benefits	830.223	751.263	773.309	2.354.795	2.626.364	2.474.242	1.745.613	9,201,014
Fee Remissions	0	(8.856)	1,439	(7,417)	624,688	613,862	516,553	1,747,685
Total Benefits	830.223	742.407	774.748	2.347.378	3,251,051	3.088.104	2.262.166	10,948,699
Total Compensation	3,949,885	3.516.575	3.446.754	10.913.215	12.043.074	11.927.777	8,209,147	43.093.213
Material and Supplies - General	127.976	177.568	62.612	368.155	275.548	236.444	197.745	1.077.893
Material and Supplies - General		177,300		300,133	273,340	230,444	137,743	1,077,000
1b. Actual Seasonality (by Fund) - quarters		P 200 LO	,					July 12, 2013

### Refresh Data

To update the data on a report that is already open in HTML or PDF format, click on the Refresh button from the toolbar.



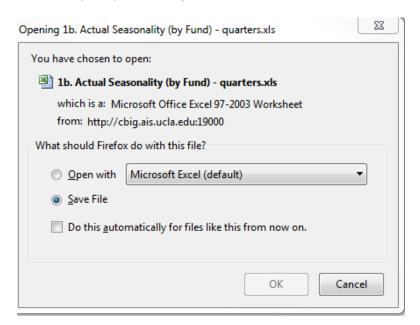
### **Export to Excel**

To export your report to Excel,

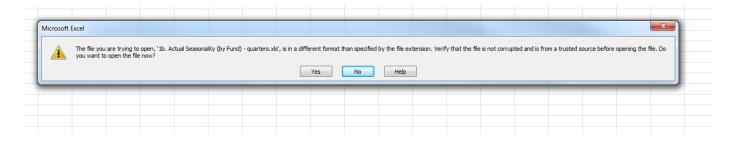
1. Select File > Export > Excel.

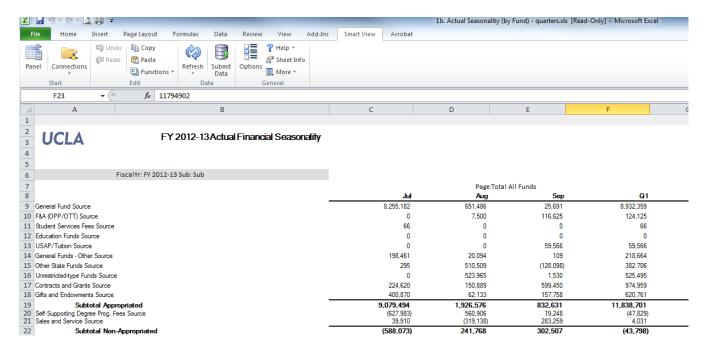


2. At the prompt, select **Open** or **Save File**, then **OK**.



3. Click Yes at the prompt:

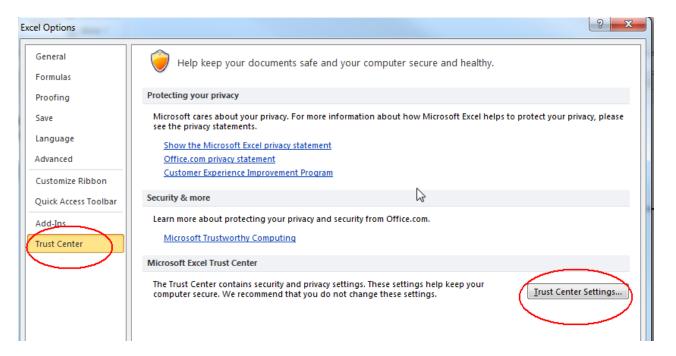




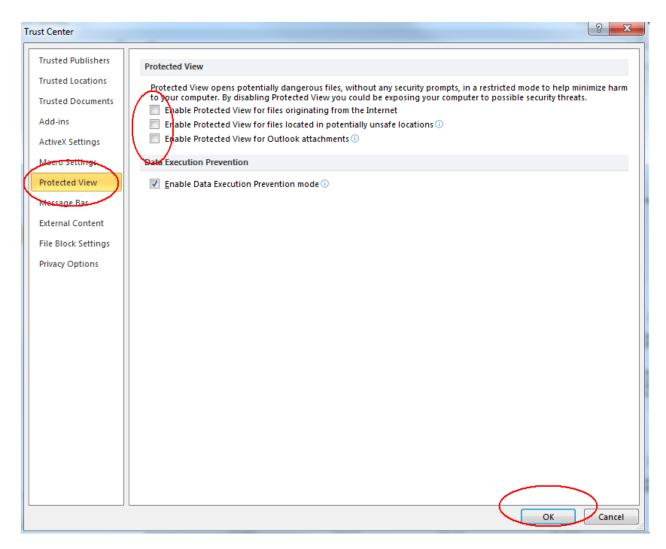


If you have Excel 2010 and you receive an error message when opening the file, you may need to change your Trust Center Settings.

- 1. Open Excel.
- 2. Click on File > Options.
- Select Trust Center > Trust Center Settings:



4. Select Protected View, uncheck all options under Protected View and click OK:

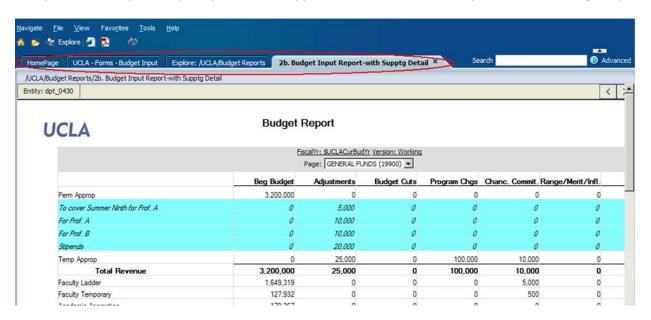


5. Restart Excel and open the document.

## **Navigation**

Each report will open as a new tab on the top of your screen, allowing you to toggle between reports and other windows, such as the input forms.

It may be helpful to have the **Budget Reports** open while you are entering your budgets on the input forms. This allows you to view your data immediately and print out your reports. As indicated earlier, it is recommended that you use the reports to print your data as opposed to the *Print Preview* option from the budget input forms.



To open additional reports, click on the short-cut button or click on the Explore tab that you may already have open:



The UCLA folders will display once again, allowing you to open additional reports.

