FY 2020-21 Budget Prep

Important Dates

1. C-BIG will be open for training purposes beginning Dec. 3, 2019

2. Budget Season Dates (tentative/subject to change): Jan. 17, 2020 through Feb. 28, 2020

3. Budget Conference Packets Due: March 6, 2019

Important Links

1. APB C-BIG Webpage: http://www.apb.ucla.edu/resource-management/c-big

2. Smart View Shared Connections URL: https://finbud.it.ucla.edu/workspace/SmartViewProviders

   o Paste this URL into Smart View Options

3. C-BIG Web Application: https://finbud.it.ucla.edu/workspace/index.jsp

   o Reports can be viewed and data can be entered through the web interface as an alternative to Smart View

   o Recommended browser: Firefox ESR (Extended Support Release - please scroll down to "English (US)" and choose the Download link that pertains to your operating system)

Budget Season Resources

NEW VIDEO TUTORIALS

Contains tutorials for Smart View Installation & Configuration, Smart View Troubleshooting, Viewing Reports Using Smart View, Viewing Reports on the Web, Beginning Budget Form, and Budget Seasonality Form

- Link to Box folder
- Link to MEDNET Box folder

MAPPING TABLES – found on C-BIG webpage

- Fund Table: Maps all individual fund numbers to the C-BIG fund categories
- Object Table: Maps all object codes to the C-BIG expense categories

LOGGING INTO C-BIG

- Please log into the system using your UCLA Logon ID and your C-BIG password. To change your password, go to **Tools** > **Change Password** after logging into the C-BIG Web Application. Email Cathy Kim (cson@ponet.ucla.edu) if you have forgotten your password and need to reset it.

- **15 Bud Input - Org & Fund Check** (UCLA > Budget Input Reports > Prelim): Prior to entering your budget, this report provides a starting list of funds, based on actual activity from the previous fiscal year and as of Dec in the current fiscal year

- **01a P&L by Month - 1 Yr** (UCLA > Analysis Reports): This report provides you with actual financial activity by months for the year specified, with the ability to drill down to object codes

- **18a Bud Input Prelim - Spread Check** (UCLA > Budget Input Reports > Prelim): This report will identify all department and fund combinations where   the quarterly/monthly spread is not complete
  - IMPORTANT: If non-zero amounts appear in the report after inputting all data, open the **Budget Seasonality Quarterly/Monthly Form** for the departments and funds identified and make necessary adjustments

- **24a Bud Input Prelim – Monthly w Detail** (UCLA > Budget Input Reports > Prelim): This report will provide budget data that has been submitted by month. If supporting details were used during the submission process, they will also appear in this report.

Other Reminders

1. For staff salaries, please input the sum of Career and Non-Career staff into the Career Staff row (Non-Career Staff is grayed out).

2. For benefits, please input to the CBR row ONLY.

3. Budget plans must be entered at all applicable department and fund number combinations, except for *Contracts & Grants* and *Gifts & Endowments*, which are budgeted at the fund category level.

4. C-BIG aggregates data (from department to org, or fund number to fund categories) every half hour. If you recently submitted data and view a report at a higher level, the calculations may not be accurate until the aggregations take place.

5. Due to nightly system processes, please refrain from entering data from 11:00PM to 4:30AM.

6. There will be another opportunity to make any material changes to your FY 2020-21 budget plan after year-end by request.

Wrapping Up

1. Please validate using reports like the following after entering data for each department and fund combination:
   a. **18a Bud Input Prelim - Spread Check**
   b. **24a Bud Input Prelim – Monthly w Detail**

2. There is an additional form, **03. Organization Seasonality Form**, which can be used as a report to check submitted data. There are dropdown menus for fund and object (e.g. Perm Approp, Total Benefits, Ending Balance, etc.), and the organizations or departments are listed in the rows with the ability to drill down.

3. There will be NO formal approval process within C-BIG. Each organization/department is responsible for coordinating review and approvals. Once budget season ends, the submissions are considered final.