

# INSTRUCTIONS FOR TRUMBA UPLOAD LANI LANDAYAN

UNIVERSITY OF CALIFORNIA, DAVIS | 1441 Research Park Drive, Room 206

## **ABOUT TRUMBA**

Trumba is an on-line calendaring software available for FOA (Finance Operations and Administration). The Finance department is currently using Trumba to post the annual fiscal close events for campus administrators. Trumba works best using Google Chrome as the web browser.

FOA Communications working on developing their own tool for calendaring to replace Trumba. In the meantime, below is a list of instructions as how to update and edit events using Trumba.

# EDITING THE TRUMBA CALENDAR

### Log-In Information

1. To edit or load information into Trumba, you would need to log into the Trumba website at the following URL: <a href="http://www.trumba.com/connect/default.aspx">http://www.trumba.com/connect/default.aspx</a>



2. Click on the "Sign-In" button on the right side of the screen



3. Log in UC Davis username and password:

Username:	arboretum@ucdavis.edu
Password:	password

ign In	B A.	
SIGN IN USING	YOUR TRUMBA EMAIL ADDRESS AND PASSWORD	
Email address:	arboretum@ucdavis.edu	
Password:	•••••	
	Automatically sign me in on this computer	
Sign In		
Forgot your pass	word? Request a reset email	
rongot your puss	indian <u>requestorescentan</u>	

## Accessing the Fiscal Close Calendar

Once logged into Trumba, you will see the following screen:

((+ Trumb	oa – Ev	vents			×	+																													
	G	' ŵ	G		Trum	ba Corporat	ion (l	JS)	https:	//www.trumk	ba.com	n/t2/?s:	;=dT00	OTc4N	NzY2Jn	M9N1	[czNyZh	PXR	RkJn'	Y9MC	ZkPTE	mZj0w		80%		• 🛛	☆				l	i∖ ₫	2 0	•	S :
∯ Most	Visite	d 🧕	Gettir	ig Sta	rted	Finance 8	ι Busir	ness	🖨 FUI	NDRIVER Web	Mod	CF	FR																						
Events	Ca	mpus	Locati	ons	Im	ages																				T2	Feedb	back	Trum	ıba Cla	ssic	UNIVERSE		/IS	FOA
Healthy	Healthy Campus Network Published at: calendar																																		
← 5 M	M	AY 20	20	-	÷	^ + Add	Event	6	Print																	List $\vee$		<b>)</b>	Search						۹ (
26 27	28	29	30	1	2	$\leftarrow \rightarrow$	C									Μ	AY 2	7 -	29	, 20	20										6	3 Pacit	fic Tim	e (US 8	& Cana
3 4	5	6	7	8	9	SELECT	A	JI	None	Select an a	action				$ $ $\vee$		Go																		
10 11	12	13	14	15	16	ONGOING		-	1/28 - 12	/30	Exhit	ibitions:	:: Kalten	nbach, H	Human I	Figure,	NEW ER	A 9/	Mane	etti Shrem	n Museum	• The Ja	Shrem	and Ma	aria Man	etti Shre	em Mus	seum (	of Art is c	losed ur	ntil furti	her noti	ce. Eve	nts are	canceled
17 18	19	20	21	22	23			•	2/18 - 6/	19	"Feat	athered	l Relatio	ons: Wo	rks by N	Marwin	Begaye	" <b>9</b> C	C.N. Go	orman M	luseum •	The C.N.	Sorman I	Museu	m is clos	ed until	further	r notic	e. , Solo (	exhibitio	on by th	e Diné i	artist in	cludes p	prints, w
24 25	26	27	28	29	30			•	3/2 - 9/1	1	"Vote	tes for V	Women	: Celebr	rating th	he Cen	tennial o	of the	ie 19t	th Ame	ndment	t" 🛛 Peter	J. Shields	s Librar,	y • Shiel	lds Libra	ry is clo	osed a	t least th	rough A	pril 7, e	except fi	or the 2	4-Hour	Study R
31 1	2	3	4	5	6			-	4/1 - 5/3	1	Drin	nk Tahoe	e Tap: P	Plastic R	Reductio	on Can	npaign •	An or	ongoin	g educat	tional can	npaign in	Tahoe to	reduo	e single-	use plas	tics by	encou	raging p	eople to	Drink T	íahoe T	ap!		
	We	d, 5/27/	2020						4/1 - 5/3	1	Well	Iness Ar	mbassa	dors • \	Wellness	Ambas:	sadors ser	ve as	s repre	esentativ	es of the	UC Davis	Staff and	d Facul	ty Health	n and We	ell-being	ig prog	gram whi	le suppo	orting a	nd enga	aging th	eir colle	eagues ir
	RENT	r pub	LICAT	ION	•^			-	4/17 - 6/	30	ONLI	LINE EXH	HIBIT - "	"Picnic I	Day: By	the De	ecade" •	Exper	erience	e more t	than a cer	ntury of P	cnic Day	highlig	hts, fror	n 1909 ti	o 2019,	, throu	igh histo	ric phot	ographs	s and vi	deos fre	om the	library's
- 🖿 UCD	avis							-	5/23 - 6/	5	Fall 2	2020: O	Jpen Re	gistrati	ion; Con	ntinuin	g Studen	nts • I	Open	n registra	ation; con	tinuing st	udents. \	Neekda	sys 6:00	a.mmi	dnight.	Week	ends 10:	00 a.m	-6:00 p.	m.			
- 🖿 A	I Publi	c Event	5			WED 5/27		_	All Day		Sprin	ing Spor	rte Suer	andad	a Interco	ollegiate	Athlatics		unced	March	12 the tu	roension	of all ran	nainine	winter	enorte co	moetit	tion a	od all ro	cing con	netitio	n due t	o the cr	ronwi	icur outb
- 6	Staff	, Facult	/ and R	tirees		110 5121	-		All Day		sprin	ng spor	rts Susp	Jendeu	- merce	onegrate	Au metrea e		- an incera	amarch	12 010 30	apenaion			, without a	sports co	-	crori, ai	ing en apr	ing con	pearon	1, 000 0	o une co	- Cright	103 0010
		lealthy	Camp	is Net	· 🔻		-		7:30am	9 hrs 30 mins	Nurs	sing Ori	ientatio	on Day 6	6 🖗 Broa	idway Bu	uilding • Th	ne goa	oal of n	nursing o	orientatio	in is to en	sure that	orient	ees rece	ive cons	istent i	.nform	ation reg	;arding ;	policies,	proced	iures, s	andard	ds and d
– 🗹 отн	ER C	ALEN	DARS		^			-	7:30am	1 hr	Pedia	iatric Co	ongenit	tal Hear	rt Disea	se Con	ference	& Qu	uality	y Impro	ovement	t 🔍 UC Da	vis Medic	cal Cent	er + The	UC Dav	is Pedia	atric H	eart Cen	ter host	s a Ped	iatric Co	ongenit	al Heart	t Disease
+ 🖿 Priva	te and	Interna	l Calenc	lars				-	7:50am	1 hr	OB/G	GYN Gra	rand Ro	unds 🖗	UC Davis	s Medical	l Center • 1	The D	Depart	tment of	Obstetri	cs and Gy	necology	hosts	Grand R	ounds fr	om 7:5	50-8:50	) a.m. on	the 2nd	i and 4t	h Wedr	esday (	of each	month a
Requ	est to :	show or	n UC Da	vis	-				8:00am	2 hrs	Pedia	iatric Ac	dvanced	d Life Sı	upport	(PALS)	Blended	d Lea	arnin	ng 🛛 Dan	vis I Buildi	ing + The	AHA Hea	rtCode	S blend	ed learn	ing pro	ogram	is a Web	-based, :	self-pac	ed inst	ruction	al progr	ram that
	avis	c Event			Ţ			-	8:00am	8 hrs 30 mins	Reig	șniting ti	the Spir	rit of Ca	iring, Da	ay 1 👽	Administra	tive Su	Suppor	rt Buildin	g (ASB) •	This cour	e will for	cus you	ir attenti	ion on ta	iking be	etter c	are of yo	urself, c	on stren	gthenir	ng your	relation	nships w

To edit the fiscal close calendar, please go to the "Current Publications" menu in the center of the left window and drill-down to Accounting and Finance Box by drilling down on UC Davis > All Public Events > Administration and Operations > Finance, Operations, and Administration > Finance & Business > Finance > Accounting & Financial Reporting. (Right below the calendar display.)



**NOTE**: when logging in, you may see different options under the **Current Publications**. If you do not see Finance, please minimize the "Current Publications" by clicking on the "-" sign in front of either **Current Publications** or **UC Davis**. You may need to toggle a couple times before you are able to see the correct options.



## Exporting

To edit the events on for the fiscal close calendar, you will need to export the current events from Trumba. Once you have selected the **Accounting & Financial Reporting** events from **Current Publications** menu (see "Accessing the Fiscal Close Calendar section"). Go to the **TASKS** menu on the bottom of the left window and select **Export**.



You will be transferred to another webpage.

On the new webpage. Select the **Download Calendar as CSV File** button.



The download will appear on the lower left hand side of the Google Chrome browser.

Return to UC Davis » All Public Events » A	dministration and Operations » Finance, Operations, and	Administration (
Download Calendar as an ICS Fi	ICS is the best choice for importing into Macintosh (Cal, Mozilla Sunbird, or back into Trumba Connect. Learn more about export file formats.	
Download Calendar as a CSV Fi	CSV is the best choice for importing into Microsoft Outlook, Yahoo! Calendar, or Palm Desktop. Learn more about export file formats.	
Cancel		
rivacy Policy I Terms of Use I Customer Se	rvice   Feedback	
rivacy Policy   Terms of Use   Customer Se 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
Privacy Policy   Terms of Use   Customer Se 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
Privacy Policy   Terms of Use   Customer Se 8 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
Privacy Policy   Terms of Use   Customer Se Ͽ 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
Yrivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	nvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 8 2004-2020 Trumba Corporation. All rights	nvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	nvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	nrice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	nvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	nice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	nice   Feedback reserved. Trumba is a registered trademark of Trumba C	orporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 9 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	nice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	nice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se 0 2004-2020 Trumba Corporation. All rights	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.
rivacy Policy   Terms of Use   Customer Se	rvice   Feedback reserved. Trumba is a registered trademark of Trumba C	prporation.

Double click on the **uc\_davis\_all\_public.csv** document icon and download the csv document to your computer. This file will be your working document.

### **Editing the CSV File**

Open the file from where you downloaded it and edit the information as needed.

	Α	В	С	D	E	F	G	Н	- I	J	K	L	М	N	
1	Subject	Start Date	Start Time	End Date	End Time	All day ever	Description	Location	Web Link	Event Temp	Audience T	Event imag	Event Typ	e(Id:34647)	
2	Deadline: I	5/15/2019	17:00:00	5/15/2019	17:00:00	FALSE	Submit		http://finar	Main Categ	Faculty and	https://ww	Forums, I	Discussions a	and
3	Notificatio	6/1/2019	0:00:00	6/2/2019	0:00:00	TRUE	June Prelim	ninary (Perio	od 12) ledge	Main Categ	Faculty and	https://ww	Administ	rative Dates	
4	Deadline: V	6/1/2019	17:00:00	6/1/2019	17:00:00	FALSE	Work study	/ changes fo	r any previo	Main Categ	Faculty and	https://ww	Administ	rative Dates	
5	Deadline: V	6/3/2019	17:00:00	6/3/2019	17:00:00	FALSE	Vendor set-			Main Categ	Faculty and	https://ww	Administ	rative Dates	
6	Notificatio	6/6/2019	0:00:00	6/7/2019	0:00:00	TRUE	<strong>Jui</strong>	ne Prelimina	ary (Period 1	Main Categ	Faculty and	https://ww	Administ	rative Dates	
7	Notificatio	6/11/2019	0:00:00	6/12/2019	0:00:00	TRUE	Begin		http://finar	Main Categ	Faculty and	https://ww	Administ	rative Dates,	For
8	Notificatio	6/11/2019	0:00:00	6/12/2019	0:00:00	TRUE	<strong>Ma</strong>	ay (Period 1	1)	Main Categ	Faculty and	https://ww	Administ	rative Dates	
9	Deadline: E	6/14/2019	17:00:00	6/14/2019	17:00:00	FALSE	Submit		https://fina	Main Categ	Faculty and	https://ww	Administ	rative Dates	
10	Deadline: R	6/14/2019	17:00:00	6/14/2019	17:00:00	FALSE	Any fiscal y	/ear-end <st< td=""><td>rong&gt;Requis</td><td>Main Categ</td><td>Faculty and</td><td>https://ww</td><td>Forums, I</td><td>Discussions a</td><td>and</td></st<>	rong>Requis	Main Categ	Faculty and	https://ww	Forums, I	Discussions a	and
11	Deadline: II	6/20/2019	17:00:00	6/20/2019	17:00:00	FALSE	Submit		https://fina	Main Categ	Faculty and	https://ww	Administ	rative Dates	
12	Vendor Set-	6/21/2019	17:00:00	6/21/2019	17:00:00	FALSE	Vendor set-	up for <stro< td=""><td>ng&gt;Automat</td><td>Main Cate</td><td>Faculty and</td><td>https://ww</td><td>Administ</td><td>rative Dates</td><td></td></stro<>	ng>Automat	Main Cate	Faculty and	https://ww	Administ	rative Dates	
13	Notificatio	6/25/2019	0:00:00	6/26/2019	0:00:00	TRUE	First day			Main Categ	Faculty and	https://ww	Administ	rative Dates	
14	Deadline: II	6/26/2019	17:00:00	6/26/2019	17:00:00	FALSE	Invoices m	ust be subm	itted to Cent	Main Categ	Faculty and	https://ww	Administ	rative Dates	
15	Deadline: D	6/28/2019	16:00:00	6/28/2019	16:00:00	FALSE	Deposits m	ust be phys	ically receiv	Main Categ	Faculty and	https://ww	Administ	rative Dates	
16	Deadline: A	6/28/2019	17:00:00	6/28/2019	17:00:00	FALSE	AggieTrave	l reports mu	ist be <stron< td=""><td>Main Categ</td><td>Faculty and</td><td>https://ww</td><td>Administ</td><td>rative Dates</td><td></td></stron<>	Main Categ	Faculty and	https://ww	Administ	rative Dates	
	o III: o	c (0.0 (0.040)	47.00.00	c 100 10010	47.00.00	E AL OF			1.0. 11 1		e 11	1.0. 11	A 1 1 1 1 1 1		

Column A: Subject

Subject is the title of the event. Most of these are the same year-to-year. If you need to remove an event, delete the whole line. If you need to add one, insert one.

#### Column B: Start Date

This is the date that event starts. Please enter the date in the format of m/dd/yyyy, or month/date/four digit year.

#### Column C: Start Time

This is time the event starts. Please enter this value as a 24 hour time period hh:mm:ss, or (hour: minute: seconds).

#### Column D: End Date

This is ending date for the event. Please enter the date in the format of m/dd/yyyy, or month/date/four digit year.

#### Column E: End Time

This is time the event ends. Please enter this value as a 24 hour time period hh:mm:ss, or (hour: minute: seconds).

#### Column F: All Day Event

If this is an all-day event, enter the value TRUE. If it is not, enter in the value FALSE.

#### Column G: Description

Enter in the text for the description of the event. You will need to format anything in bold using code similar to html. For example, if you wanted a word to be bolded, please use the beginning tag **<strong>** in front of the text string and ending tag **</strong>**.

If you wanted the description:

Credit Card Receipt (CCR) documents must be fully approved in KFS by 7:00pm in order to post to June (FY 19-20)

To appear as the below format on the calendar website:

Credit Card Receipt (CCR) documents must be fully approved in KFS by 7:00pm in order to post to June (FY 19-20)

The text would need to appear as the following in the CSV description line with the beginning and end tags surrounding the string you want to bold (see tags in blue font in the example below). Tags do not need to be formatted in blue in the actual CSV document.

Credit Card Receipt (CCR) documents must be<strong> fully approved </strong>in KFS by <strong>7:00pm</strong> in order to post to June (FY 19-20).

Column H: Location For fiscal close, this should mostly be left blank unless there is an in-person event.

Column I: Web Link Enter the URL of the website you would like to reference (if any). If not, leave blank.

Column J: Event Template Leave as "Main Category".

Column K: Audience Type Leave as Faculty and Staff. This is your target audience.

Column L: Event Image Enter the URL of the image.

Column M: Event Type The current categories are:

- Administrative Dates
- Administrative Dates, Forums, Discussions and Information Sessions
- Forums, Discussions and Information Sessions

These may change depending if management decides to change the format of communication to Campus. You would need to review the even type with the accounting supervisors and director.

### Save Your Edits

Once you have made your edits. Save the CSV file. You will need to import this into Trumba for the changes to be implemented.

## Importing Calendar to Trumba

You will need to go back to the Trumba website, log-in and go to the **Accounting & Financial Reporting** section under **Current Publications** (see Accessing the Fiscal Close Calendar section)



Scroll to the bottom of the left page menu and select **Import** from the **TASK** menu.



As with the export function, you will also be redirected to a different webpage. On this page, please select the **Choose File** button to select the CSV file that will be uploaded.

Enter the complete path of a data file containing the events you wish to import: Choose File No file chosen	
Enter the web address of a data file containing the events you wish to import: ?	]
Supported file formats are Comma Separated Values (CSV), Tab Delimited (TXT), Microsoft Excel (XLS, XLSX), iCalendar (ICS) vCalendar (VCS), and Extensible Markup Language (XML). ?	
ext > Cancel	

Once you have selected the file to be imported. Please select the **Next** button.

	Enter the complete path of a data file containing the events you wish to import:
-OR	Choose Hie I No file chosen
	Enter the web address of a data file containing the events you wish to import: ?
	Supported file formats are Comma Separated Values (CSV), Tab Delimited (TXT), Microsoft Excel (XLS, XLSX), iCalendar (ICS), vCalendar (VCS), and Extensible Markup Language (XML).
	Next > Canco

Once your file is uploaded, open the each of the items and update the **Also Shows on** field and select the following from the drop down menu: **UC Davis » All Public Events » Administration and Operations » Finance, Operations, and Administration (FOA) » Finance & Business » Finance** 

- 19 - 19 - 19 E								
Find on page	prese				No results	< >	$\diamond$ Options $\checkmark$	
Events Campu	us Locations Images							
Accounting & F	Financial Reporting	Published at: c	alendars	/foa-accounting-fir	ancial-reporting			
Return								
to UC Davis » All Pub	lic Events » Administration	and Operations »	Finance	e, Operations, and	Administration (FOA) » F	inance & Busin	ness » Finance » Acco	unting & Financial Reporting
🖉 Event Informat	tion 🆓 Registration	@ Announ	cements	5				Вок
Event Info	rmation						Template: Main	Categories and Filters
Owning calend	ar 🕜	UC Davis » All	Public	Events » Admir	istration and Operatio	ns » Finance	, Operations, and	Administration (FOA)
						-		
Also shows on	0	-						
Title		Deadline: Inte	erlocatio	on Transfer of F	unds (ILT)			
Location								Ø Map Link
								H Lat/Long
								() Recent
When		5/15/2020	<b>#</b>	5:00 PM	⊙ → 5:00 PM	0	6	Pacific Time (US & Can
		5/15/2020	<b>#</b>					
		All day	Spe	cify duration	⑦ Canceled			
Repeat 🕜		None		1~				

Click **OK** to save changes.

Go to the Fiscal Close Calendar website to see if the events have been uploaded. The URL for the calendar is: https://financeandbusiness.ucdavis.edu/systems/kuali/fiscal-close/calendar