

FY2020

FISCAL CLOSE CALENDAR

INSTRUCTIONS FOR TRUMBA UPLOAD
LANI LANDAYAN

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

ABOUT TRUMBA

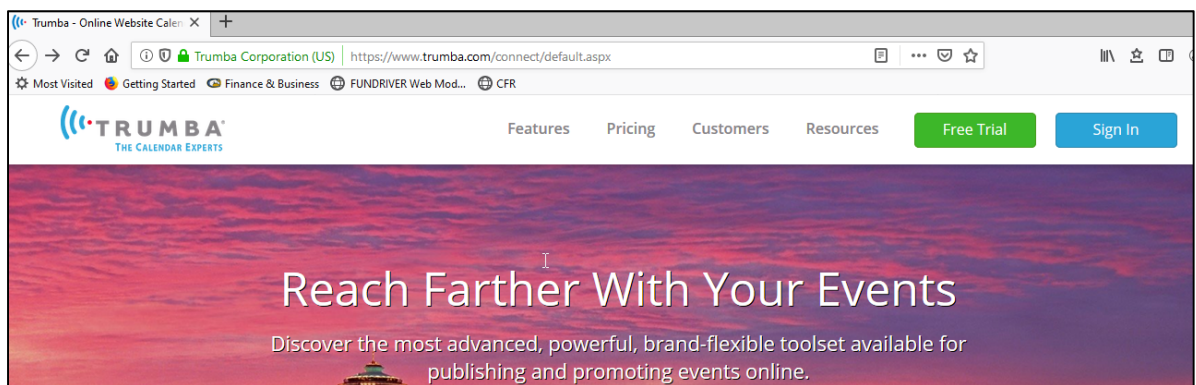
Trumba is an on-line calendaring software available for FOA (Finance Operations and Administration). The Finance department is currently using Trumba to post the annual fiscal close events for campus administrators. Trumba works best using Google Chrome as the web browser.

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.

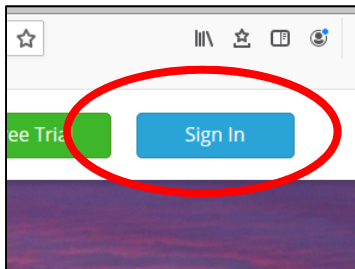
EDITING THE TRUMBA CALENDAR

Log-In Information

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



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



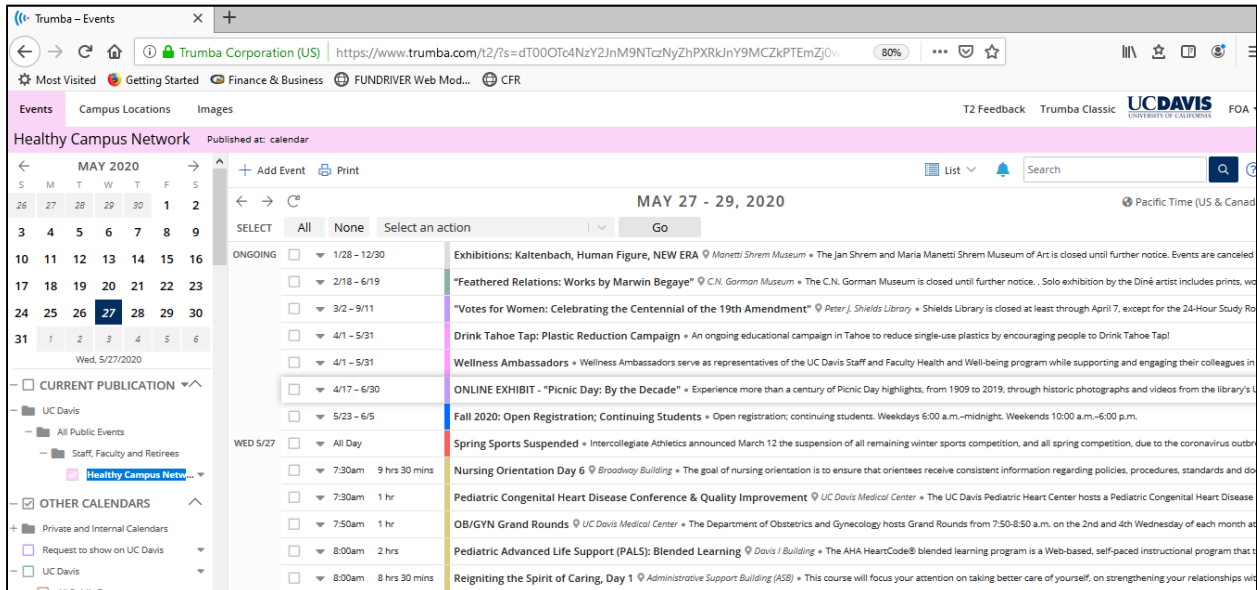
3. Log in UC Davis username and password:

Username: arboretum@ucdavis.edu
Password: password

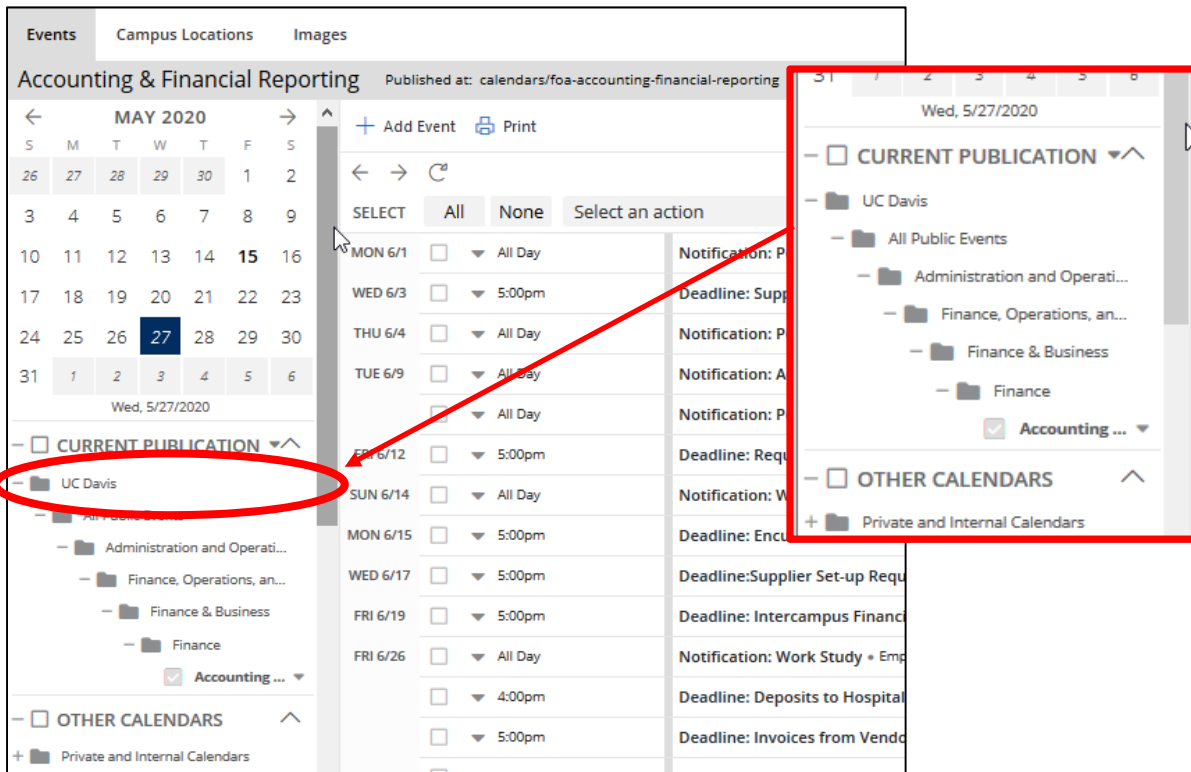
A screenshot of the Trumba "Sign In" form. The form is titled "SIGN IN USING YOUR TRUMBA EMAIL ADDRESS AND PASSWORD". It contains two input fields: "Email address" with the value "arboretum@ucdavis.edu" and "Password" with masked characters "*****". Below the password field is a checkbox labeled "Automatically sign me in on this computer" which is currently unchecked. A blue "Sign In" button is located at the bottom of the form. Below the button are two links: "Forgot your password? Request a reset email" and "Having trouble signing in?".

Accessing the Fiscal Close Calendar

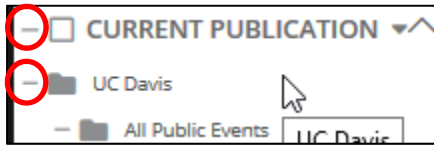
Once logged into Trumba, you will see the following screen:



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.)

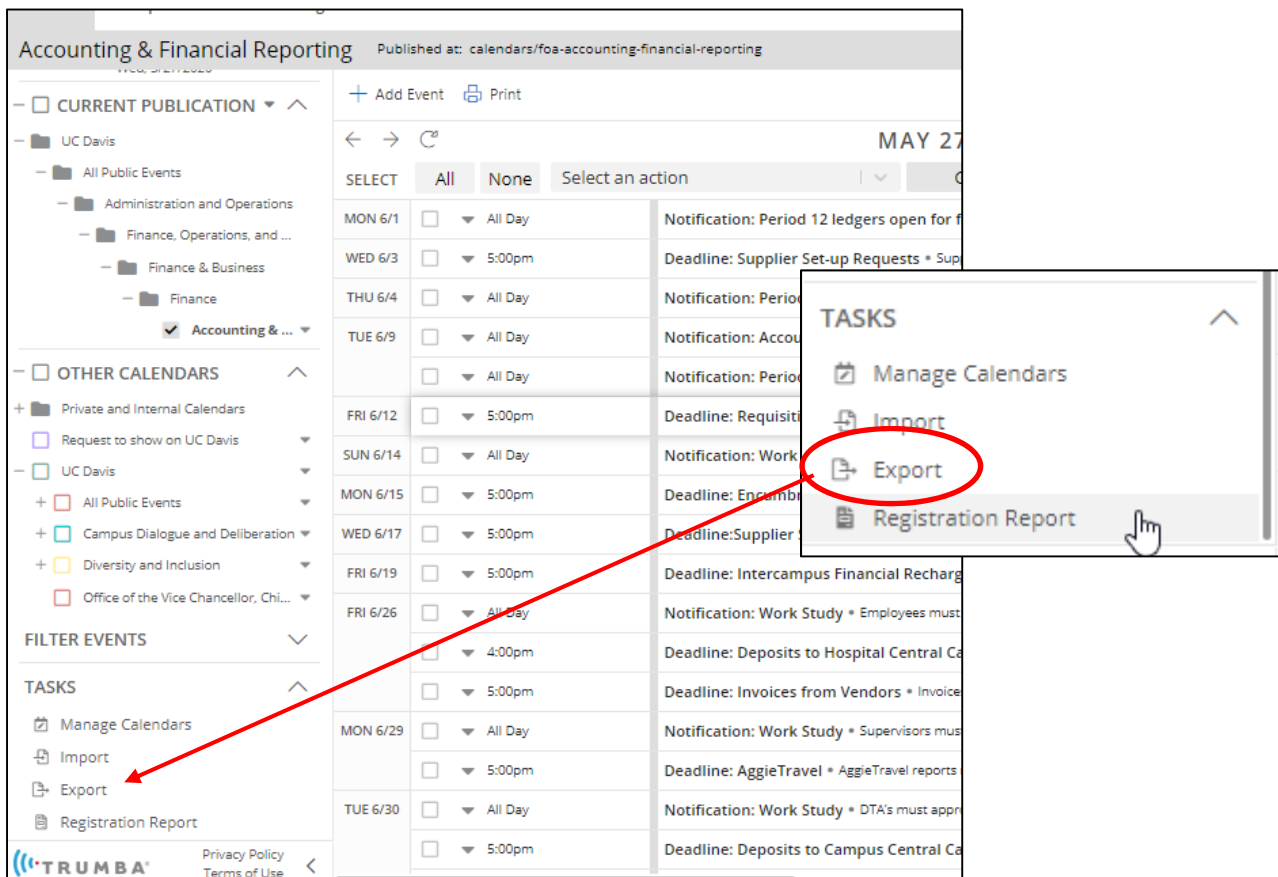


NOTE: when logging in, you may see different options under the **Current Publications**. If you do not see Finance, please minimize the “Current Publications” by clicking on the “-” sign in front of either **Current Publications** or **UC Davis**. You may need to toggle a couple times before you are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



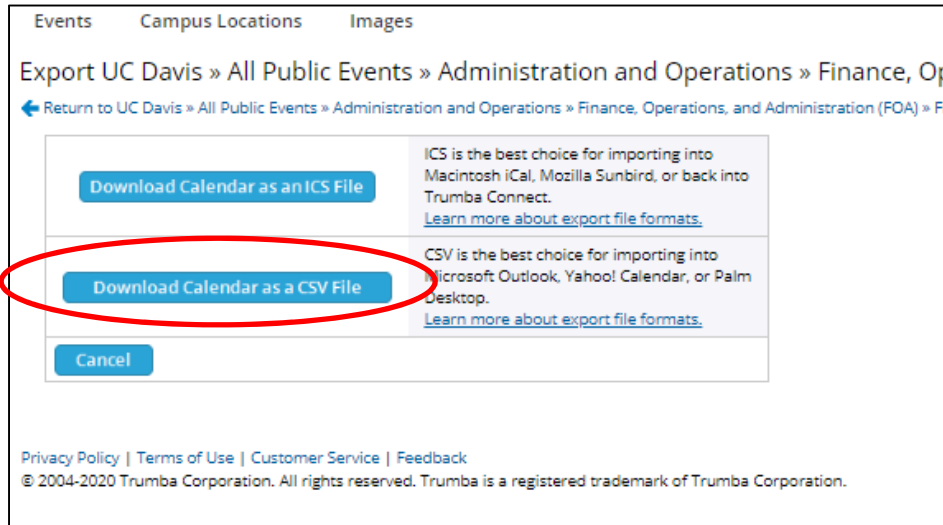
Exporting

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**.

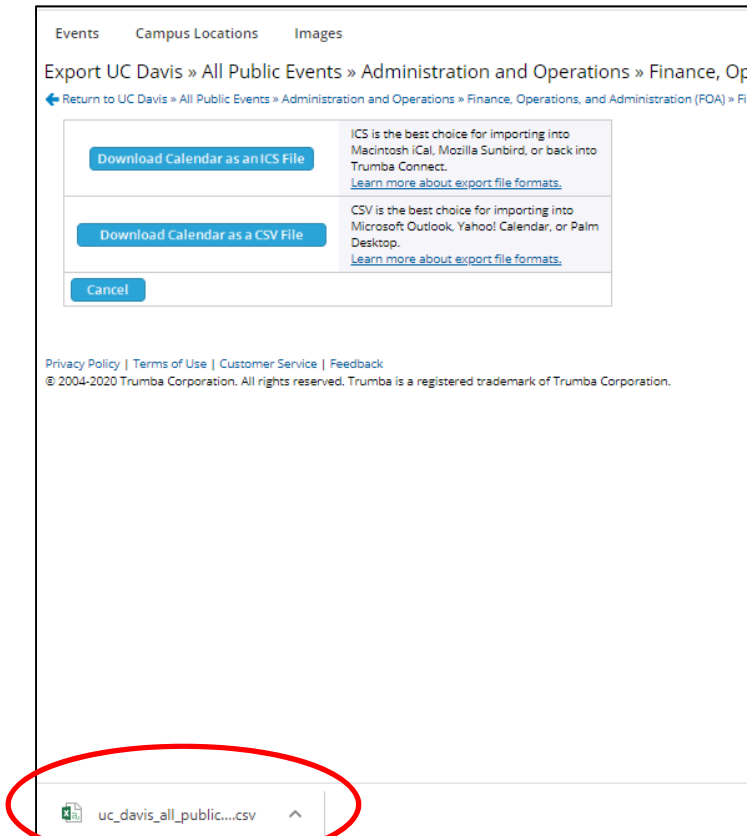


You will be transferred to another webpage.

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.



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.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Subject	Start Date	Start Time	End Date	End Time	All day event	Description	Location	Web Link	Event Temp	Audience Ty	Event image	Event Type	(Id:34647)
2	Deadline: I	5/15/2019	17:00:00	5/15/2019	17:00:00	FALSE	Submit		http://finar	Main Categ	Faculty anc	https://www	Forums, Discussions and	
3	Notification: V	6/1/2019	0:00:00	6/2/2019	0:00:00	TRUE	June Preliminary (Period 12)	ledge	Main Categ	Faculty anc	https://www	Administrative Dates		
4	Deadline: V	6/1/2019	17:00:00	6/1/2019	17:00:00	FALSE	Work study changes for any previc	Main Categ	Faculty anc	https://www	Administrative Dates			
5	Deadline: V	6/3/2019	17:00:00	6/3/2019	17:00:00	FALSE	Vendor set-		Main Categ	Faculty anc	https://www	Administrative Dates		
6	Notification: I	6/6/2019	0:00:00	6/7/2019	0:00:00	TRUE	June Preliminary (Period 1	Main Categ	Faculty anc	https://www	Administrative Dates			
7	Notification: I	6/11/2019	0:00:00	6/12/2019	0:00:00	TRUE	Begin		http://finar	Main Categ	Faculty anc	https://www	Administrative Dates, For	
8	Notification: I	6/11/2019	0:00:00	6/12/2019	0:00:00	TRUE	May (Period 11)	Main Categ	Faculty anc	https://www	Administrative Dates			
9	Deadline: E	6/14/2019	17:00:00	6/14/2019	17:00:00	FALSE	Submit		https://fina	Main Categ	Faculty anc	https://www	Administrative Dates	
10	Deadline: R	6/14/2019	17:00:00	6/14/2019	17:00:00	FALSE	Any fiscal year-end Requis	Main Categ	Faculty anc	https://www	Forums, Discussions and			
11	Deadline: I	6/20/2019	17:00:00	6/20/2019	17:00:00	FALSE	Submit		https://fina	Main Categ	Faculty anc	https://www	Administrative Dates	
12	Vendor Set: I	6/21/2019	17:00:00	6/21/2019	17:00:00	FALSE	Vendor set-up for Automai	Main Cat	Faculty anc	https://www	Administrative Dates			
13	Notification: I	6/25/2019	0:00:00	6/26/2019	0:00:00	TRUE	First day		Main Categ	Faculty anc	https://www	Administrative Dates		
14	Deadline: I	6/26/2019	17:00:00	6/26/2019	17:00:00	FALSE	Invoices must be submitted to Cen	Main Categ	Faculty anc	https://www	Administrative Dates			
15	Deadline: D	6/28/2019	16:00:00	6/28/2019	16:00:00	FALSE	Deposits must be physically receiv	Main Categ	Faculty anc	https://www	Administrative Dates			
16	Deadline: A	6/28/2019	17:00:00	6/28/2019	17:00:00	FALSE	AggieTravel reports must be	Main Categ	Faculty anc	https://www	Administrative Dates			

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 **** in front of the text string and ending tag ****.

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 fully approved in KFS by 7:00pm 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

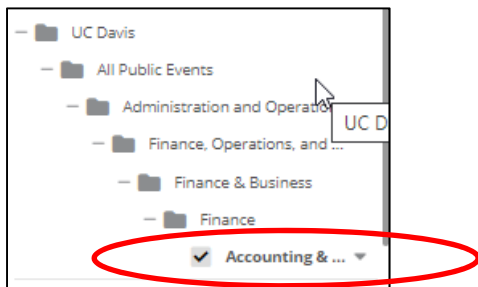
These may change depending if management decides to change the format of communication to Campus. You would need to review the even type with the accounting supervisors and director.

Save Your Edits

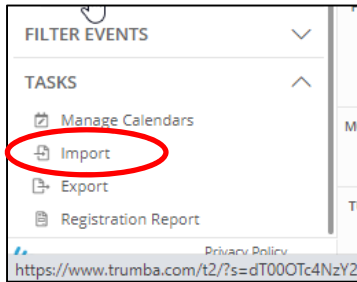
Once you have made your edits. Save the CSV file. You will need to import this into Trumba for the changes to be implemented.

Importing Calendar to Trumba

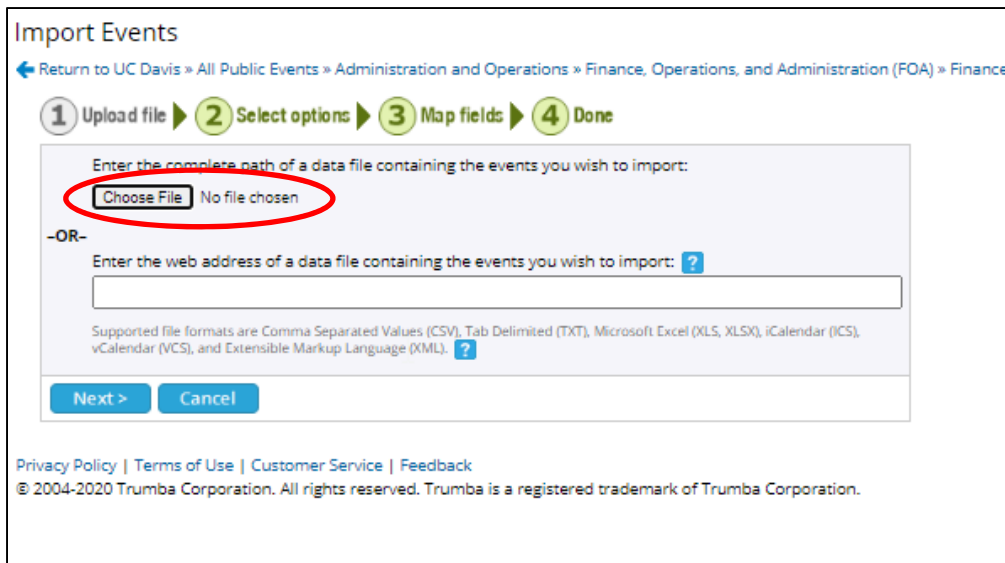
You will need to go back to the Trumba website, log-in and go to the **Accounting & Financial Reporting** section under **Current Publications** (see Accessing the Fiscal Close Calendar section)



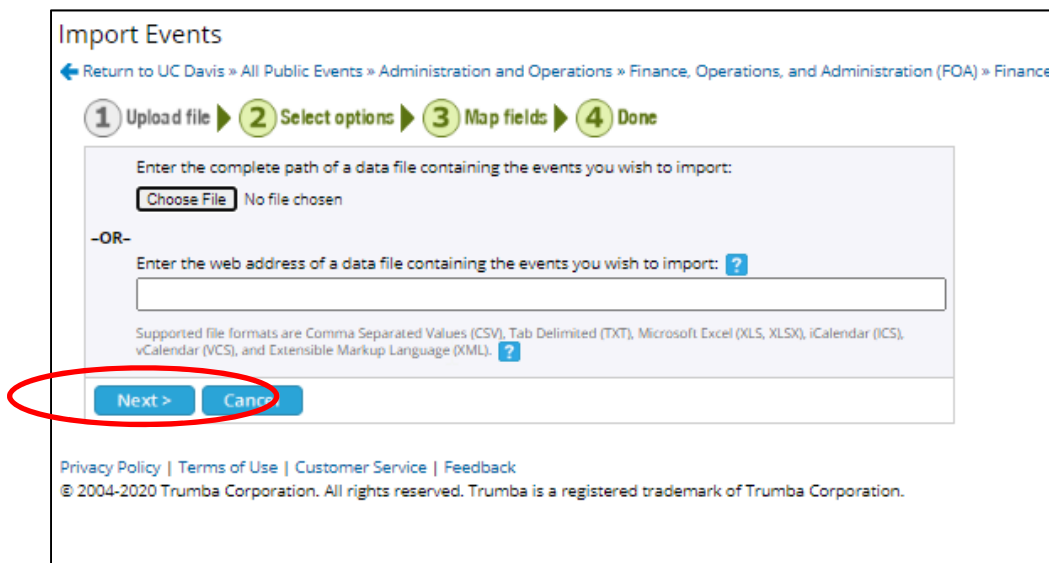
Scroll to the bottom of the left page menu and select **Import** from the **TASK** menu.



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.



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



Once your file is uploaded, open 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**

Find on page prese No results < > Options v

Events Campus Locations Images

Accounting & Financial Reporting Published at: calendars/foa-accounting-financial-reporting

← Return

to UC Davis » All Public Events » Administration and Operations » Finance, Operations, and Administration (FOA) » Finance & Business » Finance » Accounting & Financial Reporting

Event Information Registration Announcements OK

Event Information Template: Main Categories and Filters ^

Owning calendar ? UC Davis » All Public Events » Administration and Operations » Finance, Operations, and Administration (FOA)...

Also shows on ? [Highlighted dropdown menu]

Title * Deadline: Interlocation Transfer of Funds (ILT)

Location Map Link Lat/Long Recent

When 5/15/2020 5:00 PM → 5:00 PM Pacific Time (US & Can...
5/15/2020

All day Specify duration ? Canceled

Repeat ? None

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>

