

This session will *not* be recorded, but this PowerPoint can found

<https://medschool.ucla.edu/research/researcher-resources/administrative-support/department-medicine-office-research-administration/fund-management-training>

Proposal Budget Preparation

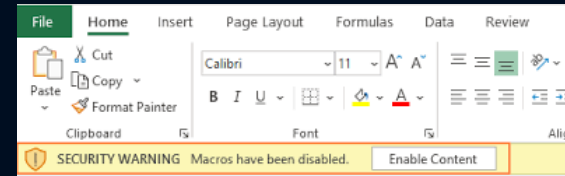
Validated Template Instructions

UCLA DEPARTMENT OF MEDICINE
OFFICE OF RESEARCH ADMINISTRATION
ZOOM TRAINING

How the template works

The "[Budget Exercise EXCEL Validated Template](#)" is a modified version of the "[Budget_Template-Simple-All-Years](#)" template available on our website. The Validated template will provide feedback in real-time noting whether the fund manager has correctly (or incorrectly) calculated the costs.

- Names of personnel and budgeted line items in each category are pre-filled for the fund manager. These fields (columns A-H) are typically blank except for the category headers (bold text).
- Macros must be enabled for validations to work correctly. The preparer will be prompted to enable these when the workbook is opened.



- Copy-Paste has been disabled to allow validations to run properly. If the preparer overrides this restriction the validations will no longer work. DOM ORA will not manually review budgets that override the auto-validations.
- Individual cells will turn a shade of **green** (Light=Basic, Medium=Intermediate, Dark=Difficult) when the correct value is entered. It will turn **yellow** if a common error has been made (wrong answer, but close). The cell will not change colors if the answer is incorrect.

E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF
Basic Budget	Correct Answer						Intermediate Budget	Correct Answer		Difficult Budget	Correct Answer		Pre-Calculated Field													Incorrect, but close. Re-review materials	

- The entire template (including blank cells) will turn a shade of **green** when the entire budget, including indirect costs, is complete and correct. See next slides for visuals.

Basic

The image shows a screenshot of a financial spreadsheet. The background is a light green color. The spreadsheet has several columns and rows. The top row is highlighted in a darker green. A single cell in the middle-left area is highlighted in yellow. The text in the spreadsheet is mostly illegible due to blurring, but it appears to be a standard financial statement or budget sheet.

Intermediate

The image shows a blurred screenshot of a spreadsheet or data table. The table has several columns and rows. A large section of the table is highlighted in green, covering approximately 6 columns and 10 rows. The text within the table is illegible due to blurring. There are some colored headers at the top, including green and yellow. A yellow arrow points to a cell in the first column of the green-highlighted area. The overall appearance is that of a data management or reporting tool.

Difficult

The image shows a detailed financial spreadsheet, likely a budget or financial statement, with a complex layout. The spreadsheet is organized into several main sections, each with a distinct header. The top row of data is highlighted in green, and many other rows are also green, indicating a consistent format or a specific data type. The columns are labeled with various financial metrics, including 'Revenue', 'Expenses', and 'Net Income'. The rows are organized into categories, with some rows having sub-headers. The overall appearance is that of a professional financial document, possibly a budget for a department or organization. The spreadsheet is displayed on a computer screen, with a blue background visible on the left side of the image.