

SPB Budget Tool Best Practices - Suggestions for Navigating the System with Ease

Confirm Pop-up Blockers

Make sure your popup blocker setting allows you to "always accept" popups from cbp.duke.edu. We suggest completing this confirmation before logging into SBP for the first time.

Loading Data

In order to limit the number of sessions that you will have to open and close, we recommend that you load your entire package or BFR (or a sub BFR if you have a very large unit). (While is possible to apply a fund or commitment item filter prior to loading your data, we do not recommend this technique). Once loaded, use the funnel icon to visually filter and "zoom" in on your data and efficiently make changes.

Order of Operations

Because the inflate button overwrites all data, we recommend using this function first and then making manual changes to your budget.

- Non-Position Layout:
 1. Inflate non position budget with zero as the inflation factor
 2. Add new lines as necessary - be sure to insert comments
 3. Manually change single budget lines
 4. Enter transfer offset codes
 5. Review the C5 and C20 reports to ensure your budget is correct and appropriate comments have been entered

- Position Layout:
 1. Inflate salaries according to the wage pool
 2. Manually change salaries if needed
 3. Add new positions as necessary - be sure to insert comments
 4. Add or change funding sources
 5. Add provisions - be sure to insert comments
 6. Enter student funding
 7. Review P1.1 and P16 reports to ensure your budget is correct and appropriate comments have been entered

Saving Data

Save your data at regular intervals, we recommend at lease every 10 minutes and ALWAYS before walking away from your desk.

Closing Sessions

After saving your data, close your session using the red "X" in the upper right hand corner of your browser. If the session has closed properly, you will see a small window popup saying "Closing Session". If the window does not appear, check your pop-up blocker settings.

Eliminating System Timeouts

The connection used between the layout and the database will close after 60 minutes of inactivity. If this happens, unsaved changes will be lost. In addition, the system will lock your data because the session was not properly closed (red "X" method). If you plan to leave your desk or switch from using the budget tool to another task for an extended period, we recommend you save and close your session properly.