**FORMATTING ECAMS BUDGET AND INVOICE TEMPLATES**

(\*\*Please contact ECAMS.Support@energy.ca.gov if you have any questions, or run into any problems.\*\*)

# **PURPOSE:**

The purpose of this document is to provide instructions and reference settings for consistently formatting the ECAMS budget and invoice templates, if required. The formatting instructions support consistent formatting for print settings, ensuring efficient navigation of the templates for the user, and restricting editing to the templates in order to preserve the accuracy and functionality of the templates.

# **PRINT TITLE ROWS:**

* **Settings for resetting the “Print Titles” rows, per template, per tab, for proper printing to PDF (with page viewing scale in parenthesis, when required):**

## PROPOSAL BUDGET

* + - **“Instructions” tab:** No “Print Titles” rows
    - **“Category Budget” tab (70%):** No “Print Titles” rows
    - **“Direct Labor” tab:** No “Print Titles” rows
    - **“Fringe Benefits” tab:** “Print Titles” row(s): **row 5**
    - **“Travel” tab:** “Print Titles” row(s): **row 5**
    - **“Equipment” tab:** “Print Titles” row(s): **row 5**
    - **“Materials & Misc.” tab:** “Print Titles” row(s): **row 5**
    - **“Subrecipients & Vendors” tab:** No “Print Titles” rows
    - **“Indirect Costs & Profit” tab:** No “Print Titles” rows
    - **“Lists” tab (hidden):** No “Print Titles” rows

## BUDGET WORKSHEET

* + - **“Instructions” tab:** No “Print Titles” rows
    - **“Category Budget” tab (70%):** No “Print Titles” rows
    - **“Direct Labor” tab:** No “Print Titles” rows
    - **“Fringe Benefits” tab:** “Print Titles” row(s): **row 5**
    - **“Travel” tab:** “Print Titles” row(s): **row 5**
    - **“Equipment” tab:** “Print Titles” row(s): **row 5**
    - **“Materials & Misc.” tab:** “Print Titles” row(s): **row 5**
    - **“Subrecipients & Vendors” tab:** No “Print Titles” rows
    - **“Indirect Costs & Profit” tab:** No “Print Titles” rows
    - **“Lists” tab (hidden):** No “Print Titles” rows

## AGREEMENT BUDGET

* + - **“Instructions” tab:** No “Print Titles” rows
    - **“Category Budget” tab (70%):** No “Print Titles” rows
    - **“Direct Labor” tab:** No “Print Titles” rows
    - **“Fringe Benefits” tab:** No “Print Titles” rows
    - **“Travel” tab:** No “Print Titles” rows
    - **“Equipment” tab:** “Print Titles” row(s): **row 5**
    - **“Materials & Misc.” tab:** No “Print Titles” rows
    - **“Subrecipients & Vendors” tab:** No “Print Titles” rows
    - **“Indirect Costs & Profit” tab:** No “Print Titles” rows
    - **“Budget Updates” tab:** “Print Titles” row(s): **row 5 to 7**
    - **“Lists” tab (hidden):** No “Print Titles” rows

## TRAINING INVOICE

* + - **“Instructions” tab:** No “Print Titles” rows
    - **“Invoice Payment Cover Sheet” tab:** No “Print Titles” rows
    - **“Invoice Summary” tab:** No “Print Titles” rows
    - **“DL & FB” tab:** No “Print Titles” rows
    - **“Travel” tab:** “Print Titles” row(s): **row 4**
    - **“Equipment” tab:** “Print Titles” row(s): **rows 4 to 5**
    - **“Materials & Miscellaneous” tab:** “Print Titles” row(s): **rows 4 to 5**
    - **“Subs & Vendors” tab:** No “Print Titles” rows
    - **“Indirect Costs & Profit” tab:** No “Print Titles” rows
    - **“Lists” tab (hidden):** No “Print Titles” rows

## STANDARD INVOICE

* + - **“Instructions” tab:** No “Print Titles” rows
    - **“Invoice Payment Cover Sheet” tab:** No “Print Titles” rows
    - **“Invoice Summary” tab:** No “Print Titles” rows
    - **“Equipment” tab:** “Print Titles” row(s): **rows 4 to 5**
    - **“Materials & Miscellaneous” tab:** “Print Titles” row(s): **rows 4 to 5**
    - **“Subs & Vendors” tab:** No “Print Titles” rows
    - **“Lists” tab (hidden):** No “Print Titles” rows

# **HIDDEN ROWS:**

* **Settings for resetting the hidden rows when preparing templates for distribution (i.e., posting), per template, per tab, for proper printing to PDF (with page viewing scale in parenthesis, when required):**

## PROPOSAL BUDGET

* + - **“Instructions” tab:** No hidden rows
    - **“Category Budget” tab (70%):** No hidden rows
    - **“Direct Labor” tab:** hide rows **17-106** and **121-210**
    - **“Fringe Benefits” tab:** hide rows **16-105**
    - **“Travel” tab:** hide rows **16-55**
    - **“Equipment” tab:** hide rows **16-207**
    - **“Materials & Misc.” tab:** hide rows **16-207**
    - **“Subrecipients & Vendors” tab:** hide rows **17-56** and **71-110**
    - **“Indirect Costs & Profit” tab:** hide rows **22-147**
    - **“Lists” tab (hidden):** No hidden rows

## BUDGET WORKSHEET

* + - **“Instructions” tab:** No hidden rows
    - **“Category Budget” tab (70%):** No hidden rows
    - **“Direct Labor” tab:** hide rows **17-106** and **121-210**
    - **“Fringe Benefits” tab:** hide rows **16-105**
    - **“Travel” tab:** hide rows **16-55**
    - **“Equipment” tab:** hide rows **16-207**
    - **“Materials & Misc.” tab:** hide rows **16-207**
    - **“Subrecipients & Vendors” tab:** hide rows **17-56** and **71-110**
    - **“Indirect Costs & Profit” tab:** hide rows **22-147**
    - **“Lists” tab (hidden):** No hidden rows

## AGREEMENT BUDGET

* + - **“Instructions” tab:** No hidden rows
    - **“Category Budget” tab (70%):** No hidden rows
    - **“Direct Labor” tab:** No hidden rows
    - **“Fringe Benefits” tab:** No hidden rows
    - **“Travel” tab:** No hidden rows
    - **“Equipment” tab:** hide rows **16-207**
    - **“Materials & Misc.” tab:** No hidden rows
    - **“Subrecipients & Vendors” tab:** hide rows **17-56** and **71-110**
    - **“Indirect Costs & Profit” tab:** No hidden rows
    - **“Budget Updates” tab:** hide rows **128-607**
    - **“Lists” tab (hidden):** No hidden rows

## TRAINING INVOICE

* + - **“Instructions” tab:** No hidden rows
    - **“Invoice Payment Cover Sheet” tab:** No hidden rows
    - **“Invoice Summary” tab:** No hidden rows
    - **“DL & FB” tab:** hide rows **21-105** and **125-209**
    - **“Travel” tab:** hide rows **15-54**
    - **“Equipment” tab:** hide rows **16-207**
    - **“Materials & Miscellaneous” tab:** hide rows **16-207**
    - **“Subs & Vendors” tab:** hide rows **22-105** and **127-210**
    - **“Indirect Costs & Profit” tab:** hide rows **20-145**
    - **“Lists” tab (hidden):** No hidden rows

## STANDARD INVOICE

* + - **“Instructions” tab:** No hidden rows
    - **“Invoice Payment Cover Sheet” tab:** No hidden rows
    - **“Invoice Summary” tab:** No hidden rows
    - **“Equipment” tab:** hide rows **16-207**
    - **“Materials & Miscellaneous” tab:** hide rows **16-207**
    - **“Subs & Vendors” tab:** hide rows **22-105** and **127-210**
    - **“Lists” tab (hidden):** No hidden rows

# **PAGE PRINT SETTINGS:**

* **Settings for resetting the tabs for proper printing to PDF, per template, per tab (with page viewing scale in parenthesis, when required):**

## PROPOSAL BUDGET

* + - **“Instructions” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Category Budget” tab (70%):** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“Direct Labor” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Fringe Benefits” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Travel” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Equipment” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Materials & Misc.” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Subrecipients & Vendors” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Indirect Costs & Profit” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Lists” tab (hidden):** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall

## BUDGET WORKSHEET

* + - **“Instructions” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Category Budget” tab (70%):** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“Direct Labor” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Fringe Benefits” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Travel” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Equipment” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Materials & Misc.” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Subrecipients & Vendors” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Indirect Costs & Profit” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Lists” tab (hidden):** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall

## AGREEMENT BUDGET

* + - **“Instructions” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Category Budget” tab (70%):** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“Direct Labor” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Fringe Benefits” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Travel” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Equipment” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Materials & Misc.” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Subrecipients & Vendors” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Indirect Costs & Profit” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Budget Updates” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Lists” tab (hidden):** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall

## TRAINING INVOICE

* + - **“Instructions” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Invoice Payment Cover Sheet” tab:** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“Invoice Summary” tab:** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“DL & FB” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Travel” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 page tall
    - **“Equipment” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Materials & Miscellaneous” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“****Subs & Vendors” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 page tall
    - **“Indirect Costs & Profit” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Lists” tab (hidden):** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall

## STANDARD INVOICE

* + - **“Instructions” tab:** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Invoice Payment Cover Sheet” tab:** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“Invoice Summary” tab:** Portrait print; print scale: fit to: 1 page wide, by 1 page tall
    - **“Equipment” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Materials & Miscellaneous” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Subs & Vendors” tab:** Landscape print; print scale: fit to: 1 page wide, by 20 pages tall
    - **“Lists” tab (hidden):** Portrait print; print scale: fit to: 1 page wide, by 20 pages tall

# **SCROLLING:**

* **Settings for resetting the file freeze pane (scrolling) selection, per template, per tab (with page viewing scale in parenthesis, when required):**

## PROPOSAL BUDGET

* + - **“Instructions” tab:** Freeze at cell **A3**
    - **“Category Budget” tab (70%):** Freeze at cell **A9**
    - **“Direct Labor” tab:** Freeze at cell **A7**
    - **“Fringe Benefits” tab:** Freeze at cell **A6**
    - **“Travel” tab:** Freeze at cell **B6**
    - **“Equipment” tab:** Freeze at cell **B6**
    - **“Materials & Misc.” tab:** Freeze at cell **B6**
    - **“Subrecipients & Vendors” tab:** Freeze at cell **B7**
    - **“Indirect Costs & Profit” tab:** Freeze at cell **C8**
    - **“Lists” tab (hidden):** Freeze at cell **A3**

## BUDGET WORKSHEET

* + - **“Instructions” tab:** Freeze at cell **A3**
    - **“Category Budget” tab (70%):** Freeze at cell **A9**
    - **“Direct Labor” tab:** Freeze at cell **A7**
    - **“Fringe Benefits” tab:** Freeze at cell **A6**
    - **“Travel” tab:** Freeze at cell **B6**
    - **“Equipment” tab:** Freeze at cell **B6**
    - **“Materials & Misc.” tab:** Freeze at cell **B6**
    - **“Subrecipients & Vendors” tab:** Freeze at cell **B7**
    - **“Indirect Costs & Profit” tab:** Freeze at cell **C8**
    - **“Lists” tab (hidden):** Freeze at cell **A3**

## AGREEMENT BUDGET

* + - **“Instructions” tab:** Freeze at cell **A3**
    - **“Category Budget” tab (70%):** Freeze at cell **A9**
    - **“Direct Labor” tab:** Freeze pane NOT used
    - **“Fringe Benefits” tab:** Freeze pane NOT used
    - **“Travel” tab:** Freeze pane NOT used
    - **“Equipment” tab:** Freeze at cell **B6**
    - **“Materials & Misc.” tab:** Freeze pane NOT used
    - **“Subrecipients & Vendors” tab:** Freeze at cell **B7**
    - **“Indirect Costs & Profit” tab:** Freeze pane NOT used
    - **“Budget Updates” tab:** Freeze at cell **D8**
    - **“Lists” tab (hidden):** Freeze at cell **A3**

## TRAINING INVOICE

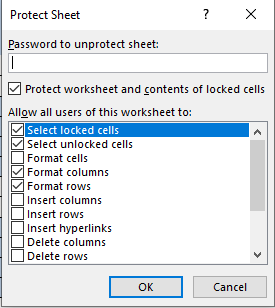
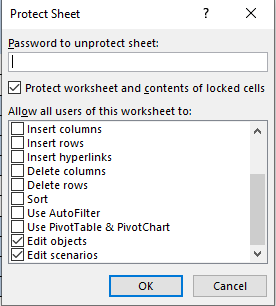
* + - **“Instructions” tab:** Freeze at cell **A3**
    - **“Invoice Payment Cover Sheet” tab:** Freeze pane NOT used
    - **“Invoice Summary” tab:** Freeze pane NOT used
    - **“DL & FB” tab:** Freeze at cell **C6**
    - **“Travel” tab:** Freeze at cell **B5**
    - **“Equipment” tab:** Freeze at cell **B6**
    - **“Materials & Miscellaneous” tab:** Freeze at cell **B6**
    - **“Subs & Vendors” tab:** Freeze at cell **C6**
    - **“Indirect Costs & Profit” tab:** Freeze at cell **C6**
    - **“Lists” tab (hidden):** Freeze at cell **A3**

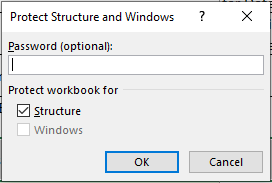
## STANDARD INVOICE

* + - **“Instructions” tab:** Freeze at cell **A3**
    - **“Invoice Payment Cover Sheet” tab:** Freeze pane NOT used
    - **“Invoice Summary” tab:** Freeze pane NOT used
    - **“Equipment” tab:** Freeze at cell **B6**
    - **“Materials & Miscellaneous” tab:** Freeze at cell **B6**
    - **“Subs & Vendors” tab:** Freeze at cell **C6**
    - **“Lists” tab (hidden):** Freeze at cell **A3**

# **RESTRICTED EDITING:**

* **Settings for locking tabs and workbooks,** **per template, per tab (this section is intended for use by the ECAMS team, but is also provided here as a reference for the user):**
* MS EXCEL FILE LOCKING INSTRUCTIONS:
* Use on all worksheets (tabs) and workbooks (files): Allows rows to be unhidden, hidden, and resizing of rows and columns. Does not allow formatting of cells. Headers and footers can be revised and printing preference (scaling, etc.) can be changed. Pictures can be pasted or inserted for adding stuff like company logos.
* All of the selections that should be made when restricting editing to an ECAMS budget or invoice template are listed below, for reference. See screen shots below for details.
  + “Protect Sheet” window selections:
    - Protect worksheet and contents of locked cells
    - Select locked cells
    - Select unlocked cells
    - Format columns
    - Format rows
    - Edit objects
    - Edit scenarios
  + “Protect Structure and Windows” window selections:
    - Structure



## PROPOSAL BUDGET

* + - **“Instructions” tab:** Applied
    - **“Category Budget” tab (70%):** Applied
    - **“Direct Labor” tab:** Applied
    - **“Fringe Benefits” tab:** Applied
    - **“Travel” tab:** Applied
    - **“Equipment” tab:** Applied
    - **“Materials & Misc.” tab:** Applied
    - **“Subrecipients & Vendors” tab:** Applied
    - **“Indirect Costs & Profit” tab:** Applied
    - **“Lists” tab (hidden):** Applied
    - **Workbook protection:** Applied

## BUDGET WORKSHEET

* + - **“Instructions” tab:** Applied
    - **“Category Budget” tab (70%):** Applied
    - **“Direct Labor” tab:** Applied
    - **“Fringe Benefits” tab:** Applied
    - **“Travel” tab:** Applied
    - **“Equipment” tab:** Applied
    - **“Materials & Misc.” tab:** Applied
    - **“Subrecipients & Vendors” tab:** Applied
    - **“Indirect Costs & Profit” tab:** Applied
    - **“Lists” tab (hidden):** Applied
    - **Workbook protection:** Applied

## AGREEMENT BUDGET

* + - **“Instructions” tab:** Applied
    - **“Category Budget” tab (70%):** Applied
    - **“Direct Labor” tab:** Applied
    - **“Fringe Benefits” tab:** Applied
    - **“Travel” tab:** Applied
    - **“Equipment” tab:** Applied
    - **“Materials & Misc.” tab:** Applied
    - **“Subrecipients & Vendors” tab:** Applied
    - **“Indirect Costs & Profit” tab:** Applied
    - **“Budget Updates” tab:** Applied
    - **“Lists” tab (hidden):** Applied
    - **Workbook protection:** Applied

## TRAINING INVOICE

* + - **“Instructions” tab:** Applied
    - **“Invoice Payment Cover Sheet” tab:** Applied
    - **“Invoice Summary” tab:** Applied
    - **“DL & FB” tab:** Applied
    - **“Travel” tab:** Applied
    - **“Equipment” tab:** Applied
    - **“Materials & Miscellaneous” tab:** Applied
    - **“Subs & Vendors” tab:** Applied
    - **“Indirect Costs & Profit” tab:** Applied
    - **“Lists” tab (hidden):** Applied
    - **Workbook protection:** Applied

## STANDARD INVOICE

* + - **“Instructions” tab:** Applied
    - **“Invoice Payment Cover Sheet” tab:** Applied
    - **“Invoice Summary” tab:** Applied
    - **“Equipment” tab:** Applied
    - **“Materials & Miscellaneous” tab:** Applied
    - **“Subs & Vendors” tab:** Applied
    - **“Lists” tab (hidden):** Applied
    - **Workbook protection:** Applied