

Budget Template Access


Use this job aid to view the budget templates associated with the 2017-18 budget process. If you are submitting Form A back to OCFO by 3/24/17, you must at minimum access your L3 Summary template and complete the Form A tabs. See last step for more detail.

1. [Click here](#) to access the CFO FP&A website (<http://cfo.berkeley.edu/fpa>)
2. Click the **SHARED FILES** link from the FP&A homepage:
SHARED FILES

Office of the Chief Financial Officer

Home Departments ▾ Financial Reports Strategic Plans Staff Resources Divisional Finance Leaders Budget Process ▾

Home » Departments » Financial Planning & Analysis



Welcome to Financial Planning & Analysis

FINANCIAL PLANNING & ANALYSIS

- Financial Planning & Analysis Team
- Central Resource Management
- Finance Committee
- Finance Reform
- Financial Reporting & Analysis
- Financial Systems
- VCAF Chief Financial Officer

Links

- [FP&A Team Directory](#)
- [Shared Files](#)
- [Related Links](#)

Overview

The Financial Planning & Analysis Team provides objective, accurate, and timely information and analyses to inform campus decision-making and strategic planning.

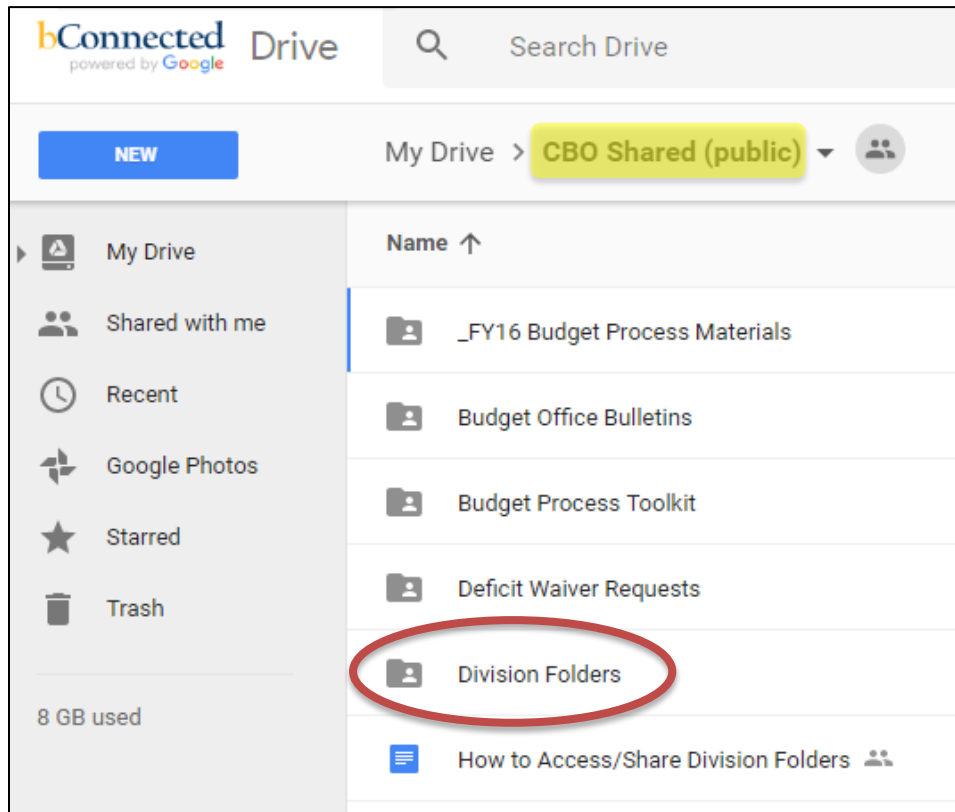
Our mission is to effectively manage the budgetary resources of the Berkeley campus in support of instruction, research, and public service. We're responsible for ensuring that campus budgetary policy and practice conform to federal, state, and university regulations. We work with campus academic and administrative units in assessing ongoing budget and planning issues, and establishing and monitoring controls over fund allocations. We provide decision support through cost benefit analysis, partnering with institutional research, and data reporting, analyzing, and forecasting.

Key Functions

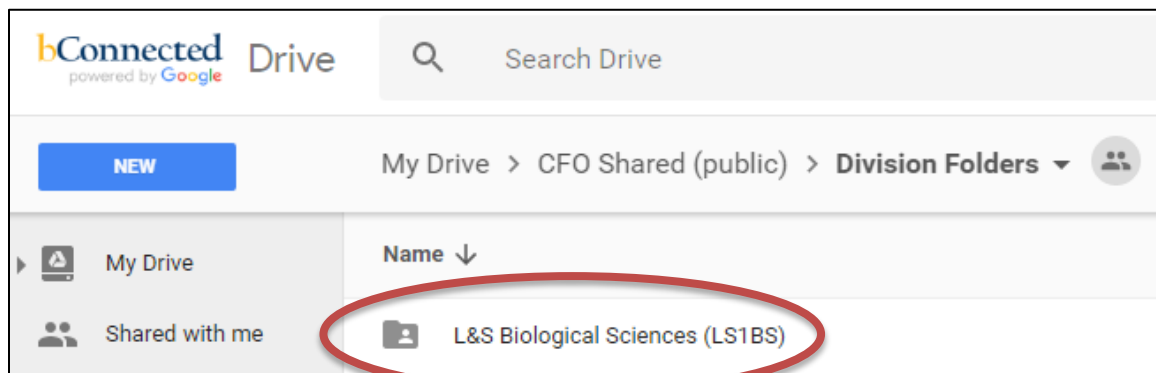
- Budget Process
- Central Resource Management
- Finance Reform
- Financial Planning, Reporting, & Analysis
- Financial Systems Management

3. The link should take you to your bConnected Google Drive CFO Shared (public) folder.

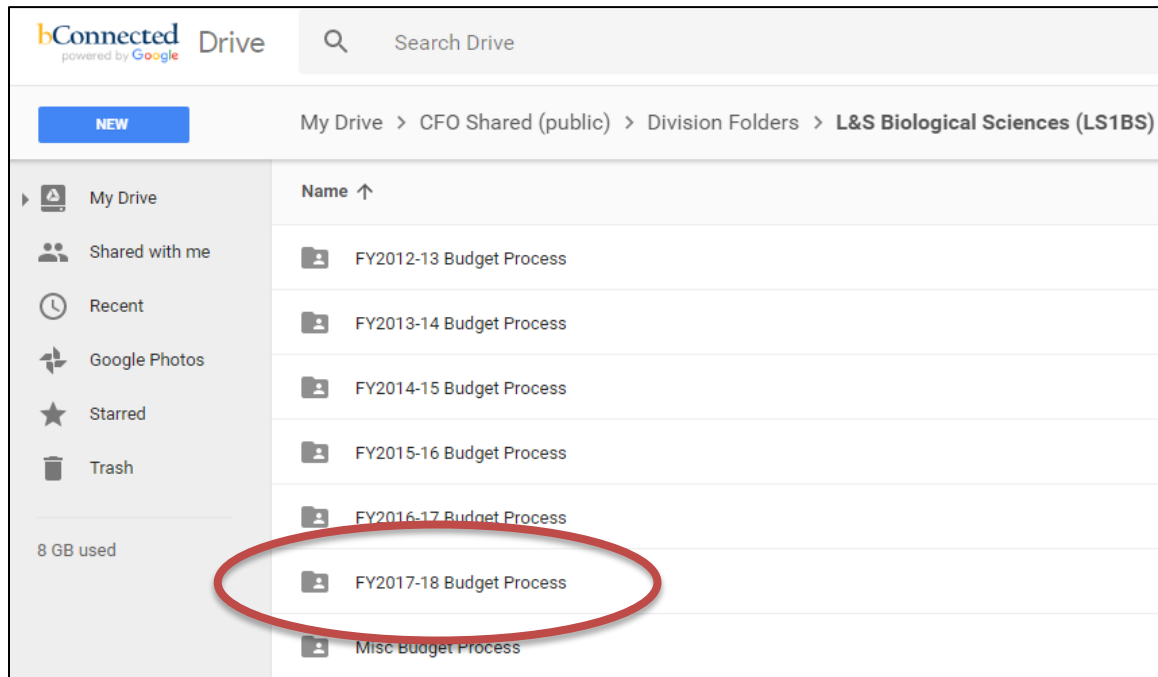
Double Click on **DIVISION FOLDERS**



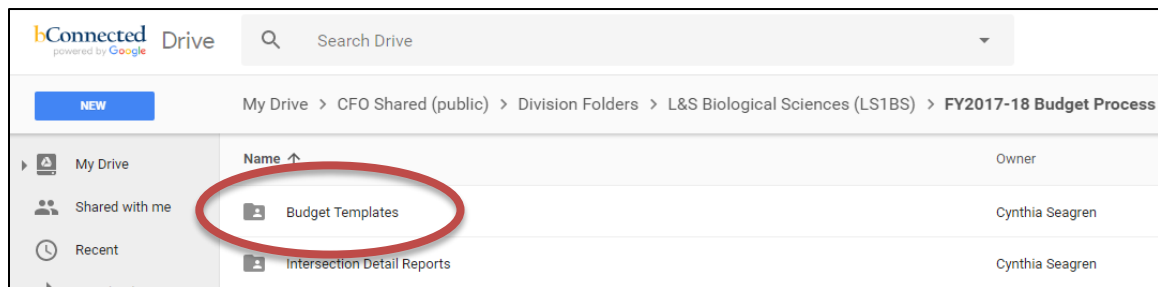
4. Double Click on **YOUR DIVISION** folder: Note that due to security access in the google folder, each DFL will have a different view for their own Division(s).



5. Double Click on **FY2017-18 BUDGET PROCESS** folder:

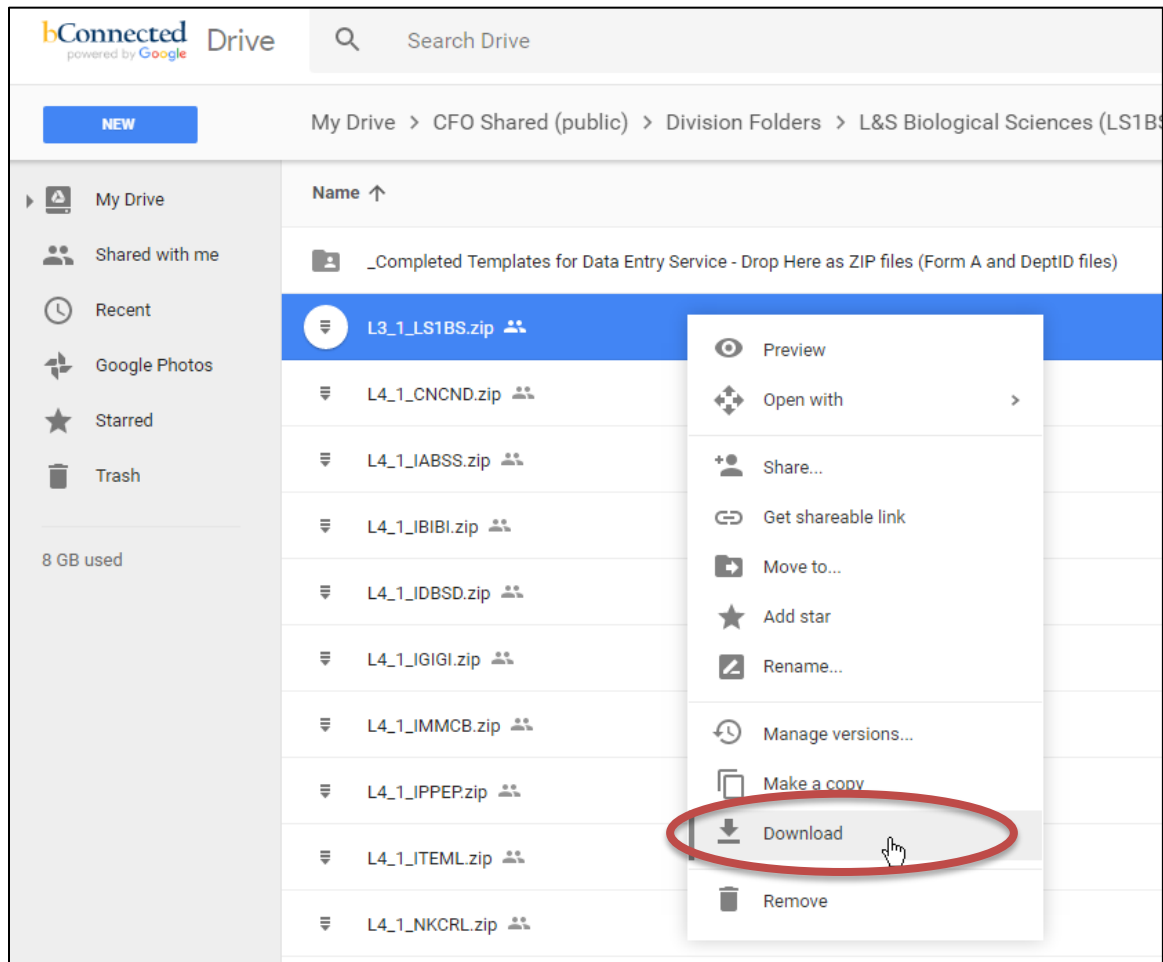


6. Double Click on **BUDGET TEMPLATES** folder:

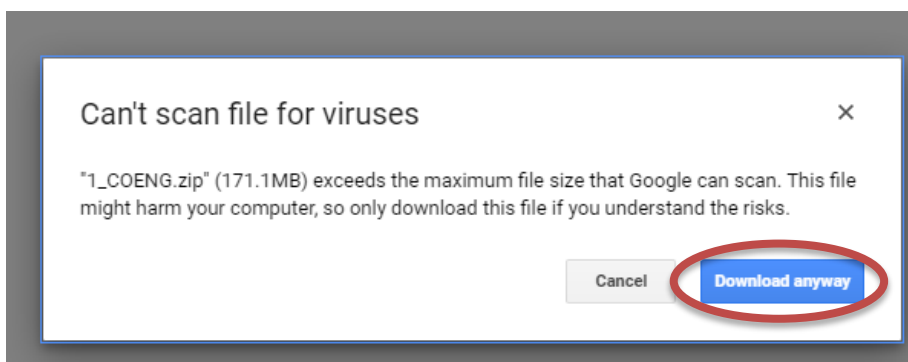


7. Find the file for your org node or DeptID file. Except for the L3-Division file, the org node files contain the underlying L7-DeptID files.

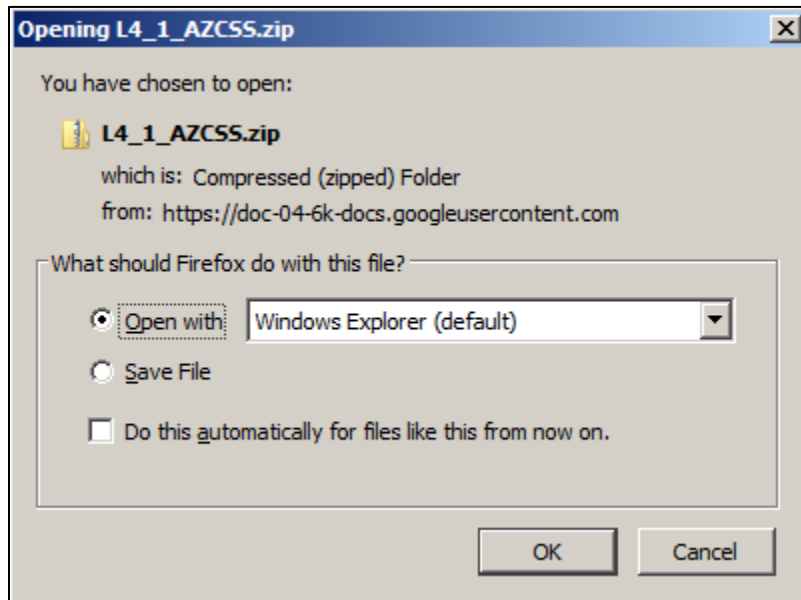
Right click on the zip file and select **DOWNLOAD**



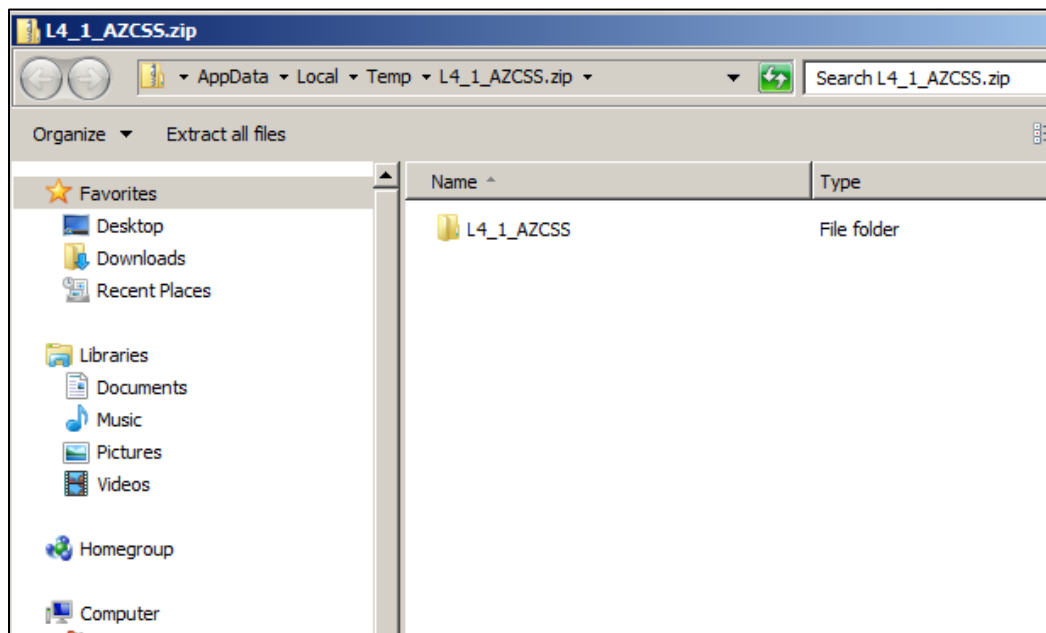
8. Click **DOWNLOAD ANYWAY** (this may not pop up depending on file size)



9. Firefox users may see this box. Choose to Open With Windows Explorer.

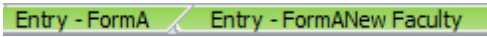


10. This will automatically save the file to a Temporary folder on your computer. From here, you may open (or “unzip”) the folder; or you may copy it to a different location and open it from there.



11. Save files to your computer

12. If you have to submit a Form A to OCFO by 3/24/17, you must fill out the first two tabs at minimum in your L3 Summary template.



The L3 Summary template will be designated as “L3” in your folder and have its own zip file.

