

To: All BFS and BAIRS users and their supervisors
From: Office of the Chief Financial officer
Date: May 31, 2012
Subject: **UPCOMING BFS Changes in TempBudg and Actuals, and Training Sign Up**

Dear BFS and BAIRS users and supervisors,

As we are all experiencing, our campus is working extra hard these days to adjust to the variety of changes executed in response to the new economic environment. In the Office of the Chief Financial Officer (CFO) our focus has been on implementing solutions to become more nimble and strategic in our financial planning and analysis.

We know this is also a busy time for you given the upcoming fiscal close, along with changes in BearBuy and Accounts Receivable. However, we want to make sure you are aware of rapidly approaching BFS improvements effective July 1, 2012 and the training opportunities available to help prepare for it.

EFFECTIVE DATES OF BFS CHANGE

This change will *not* affect your fiscal close process this year.

As part of the effort to enable more strategic financial decision-making, UC Berkeley's BFS ledger and account usage will change for some types of budget and financial journal entries starting **FY13 (July 1, 2012)**. This change will *not* affect any FY12 journals (with an effective date of June 30, 2012 or earlier).

Below is a high level overview of the affected areas:

What will NOT change:

- *Contracts and grants*
- *Plant funds*
- *Loan funds*
- *Agency funds*

What WILL change:

- For all other funds, the campus will stop using the TempBudg and its functions will move to the Actuals ledgers or CalPlanning.

LEARNING OPTIONS

There will be three opportunities to learn about the above changes:

1. Visit the CAMPUS BUDGET OFFICE WEBSITE

Beginning June 6, go to <http://budget.berkeley.edu> to review the Frequently Asked Questions (FAQs) and other materials, which will be posted as they become available to help you get oriented.

2. Sign up for an ONLINE *or* IN-PERSON TRAINING:

We will be offering online and in-person training, both with the same content:

a. Sign up for an ONLINE module Training

Beginning **June 22**, an in-depth 3-hour eLearning module (slides with voice over) will be available for those who wish to take the training remotely.

b. Sign up for an IN-PERSON Training

Beginning **June 22**, a limited number of 3-hour in-person sessions will be offered – additional sessions may be added as needed:

Friday, June 22	1:00pm to 4:00pm	Thursday, July 5	1:30pm to 4:30pm
Wednesday, June 27	1:30pm to 4:30pm	Wednesday, July 25	1:30pm to 4:30pm

3. Attend an ADVANCED Q&A (Pre-requisite: Online or In-Person Training)

Beginning **July 11**, those who have already taken either the Online or In-person training may attend a limited number of 90-minute Advanced Question & Answer sessions.

TRAINING CONTENT

The training will be led by CFO staff who will review the details of the FY13 BFS changes and what you will need to do differently as a result.

The training will include the following content:

- How the Temporary Budget currently functions in non-contracts and grants funds
- How the Temporary Budget will be replaced, including an introduction to the concept of preparing operating transfer journals in the Actuals ledgers
- The new account series for operating transfers and how to use it
- Overview of several new BAIRS reports

WHO SHOULD GET TRAINED?

Anyone who prepares or approves budget or financial journals in BFS, in non-contracts and grants funds, will need to *understand* and be able to *incorporate* the BFS changes into their work effective FY13. All supervisors of journal preparers should also be trained. In addition, BAIRS users who currently run reports on the above BFS data will need to *understand* the changes.

Supervisors should identify who from their staff needs to be trained in-person vs. online, based upon staff responsibilities, schedules, and learning styles. We recommend that people from the same team or unit attending in-person sessions do so as a group, when possible. Due to space limitations, we strongly encourage those who are solely BAIRS users to take the online training.

SIGNING UP FOR THE TRAINING

Sign up for either the Online or In-person Training at the **Learning Center** via the Blu portal at <https://blu.berkeley.edu> beginning **June 6**. Sign up for the Advanced Q&A will begin **June 22**.

IMPACT ON BAIRS REPORTS

A development effort is underway for the production of several additional new BAIRS reports to support the BFS changes. These BAIRS reports are expected to be available in July/August 2012. Existing BAIRS reports will continue to be available.

MORE INFORMATION

If you have any **questions**, please contact your divisional contact as listed on the Campus Budget Office website at <http://budget.berkeley.edu> beginning June 6.

Thank you in advance for your flexibility and engagement, as we continue to improve our processes and systems to ensure future financial success at UC Berkeley.

Regards,

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