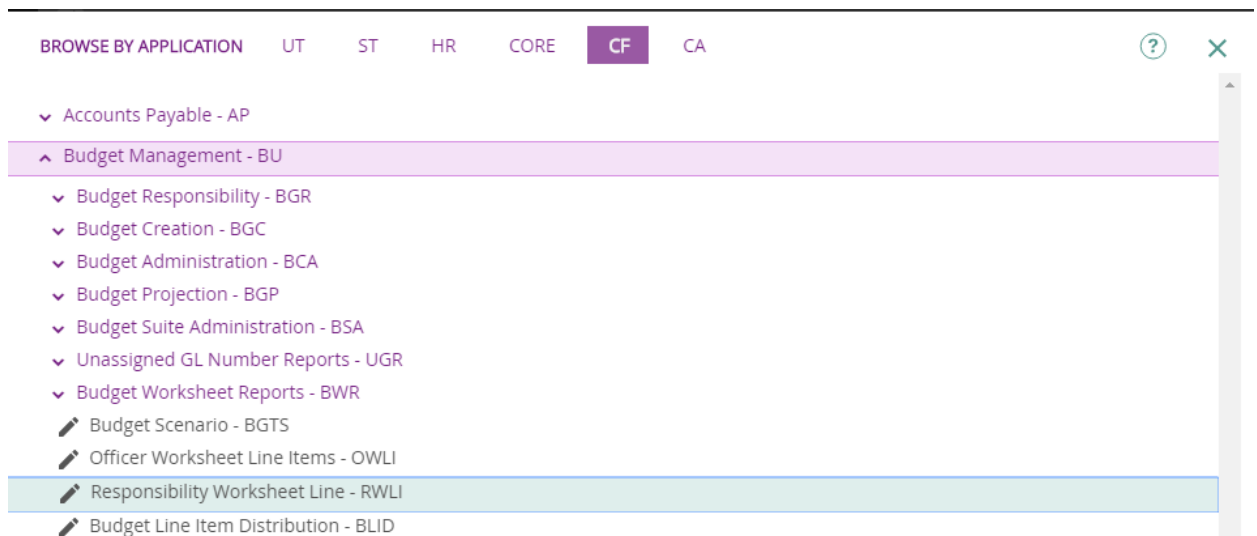


Quick Reference Guide for Colleague Budget Management Module

1. Go to your browser and type in: <https://collweb.naz.edu>
2. Login with your MyNaz username and password
3. At the Confidentiality Statement click 'OK.'
4. Click the 'Navigate' button at the top of the screen.
 - o Select the 'CF' in the application.
5. Click 'Budget Management-BU.'
6. The two options you will be using are RWLI (budget input) or ODWP (print reports).
 - o Double click on the option you want to select.
 - o You can also type RWLI or ODWP in the 'Search for a Form' box at the top left of the screen and then click 'Show Form Search Result' button to the right.





7. In the 'Budget ID LookUp' box type **2021OB0** for the budget scenario.
8. **RWLI – Responsibility Worksheet Line**
 - Column 1 – BA (Basic Amount) column by clicking in the cell that needs to be edited.
 - o NOTE: The beginning amount in the BA column is equal to the 2020 original budget.
 - Column 2 - C1 displays FY19 Actuals. The numbers in this column are shaded and cannot be changed.
 - Column 3 - C2 displays FY20 Budget figures. The numbers in this column are shaded and cannot be changed.

User Hint #1: To scroll to the next page use the cursor to click on a line in your budget and paging tools will appear below the screen name "RWLI – Responsibility Worksheet Line." Use the paging arrows to scroll pages.

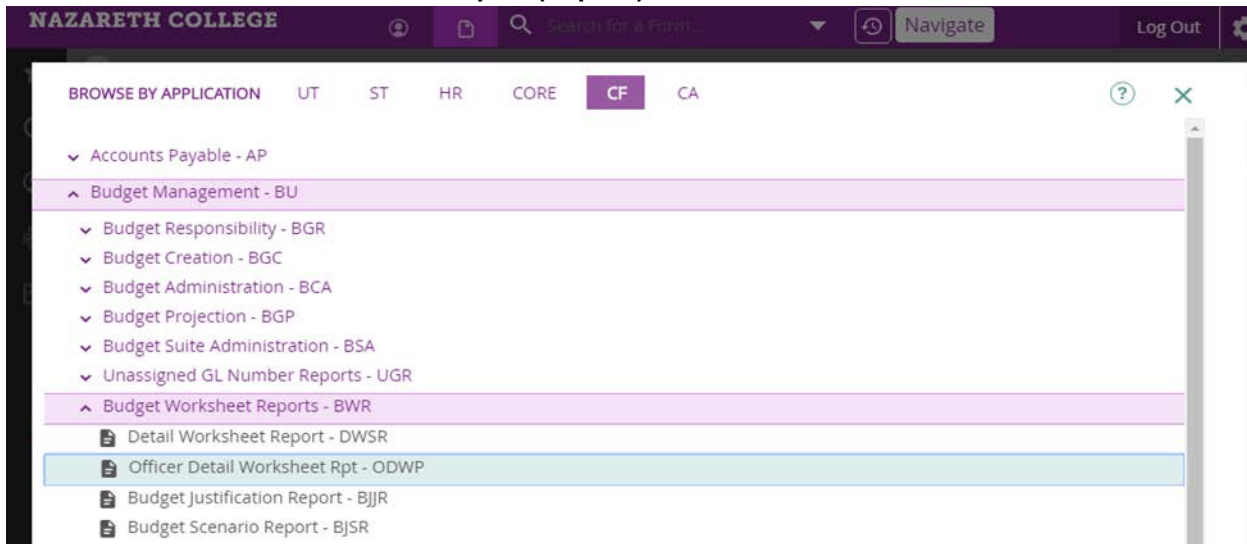
User Hint #2: You can use the Colleague Help function by clicking on the circled question mark (top left of screen).

User Hint #3: Be sure pop-up blockers are disabled in your browser when using Colleague.

9. RWLI Justification Notes

- Click on the box  to the right of the account number
- Double click on 'BJNS' or highlight BJNS and click 'OK'
- Click on the box  to the right of the first line. Type notes in the box provided.
- When finished click on 'Save' then click 'Update'

10. ODWP – Officer Detail Worksheet Report (to print)



- In the 'Budget ID LookUp' box type **2021OB0** for the budget scenario
- Indicate Changes: Yes
- Print Only Changes: No
- Print Justification Notes: Yes
- Print Active Scenario(s): No
- 'Save' then 'Update'
- Type in "H" at Output Device to Hold/Browse File Output. Do not type anything else in this screen
- 'Save' then 'Update'
- Do nothing on the next screen except 'Save' then 'Update'
- Click on 'Export PDF'
- Font: Courier, Font Size: 8.0, Orientation: Landscape, Paper Size: Letter then Create PDF
- To save the PDF select 'File' from the top left menu and 'Save Page As' (type a file name for the report) and click 'Save.' You may print this report at any time.

11. Delegating Budget Module Permissions to Another Person (Assigning an Alias)

- If a staff member other than the budget manager will be working within the Budget Management Module, an alias must be assigned.
- The alias you designate must have a Colleague account (contact the ITS Service Desk if a new account is needed)
- Contact Jhimu Chowdhury to grant permission to assign the alias.
- To assign yourself as an alias:
 - In the 'Form Search' box type in 'BAAS' (Budget Alias Assignment).
 - In the 'Budget ID LookUp' box type **2021OB0** for the budget scenario.
 - Do you wish to Assign or Reinitialize: Type in 'A' to Assign
 - Alias will represent Budget Officer: Type in the Budget Manager's Budget Responsibility code (call Jhimu Chowdhury for the code).