Course Description:
It’s time to think about the fiscal year 2020 budget! The FY20 budget planning calendar will be distributed and budget policy and procedure revisions will be reviewed. Colleague Budget Management will be used for the budget planning process, so a review of the navigation, input screens and report production tools will be included. Budget training for FY20 will be offered in the September / October 2018 time frame.

*Note, the refresher course is intended for experienced budget management users only; those who are new to the budget process should attend the introduction course.

Audience:
• Budget officers & aliases
• Divisional executives and president submitting and approving department / divisional budget

Prerequisites:
• Required -
  ✓ IMT-1005 Introduction to Colleague
  ✓ IMT-1040 Procurement Basics
  ✓ IMT-1045 Cost Center Manager Training
• Recommended –
  ✓ HRD-1012 FERPA Training

Course Length:
• Introduction -
  ✓ 2 hours (lecture/lab)
• Refresher -
  ✓ 1 hour (online)

Course Outline:
• Budget calendar and critical time lines
• FY 2020 changes and reminders
• Overview budget process
• Assumptions and guidelines for FY20
• New initiatives
• Budget terminology
• Budget transfers
• Getting started with Colleague Budget Management
  ✓ XGLR for previous year allocated budget review
  ✓ Budget Officers and Aliases
  ✓ BAAS Budget Alias Assignment

• Course Outline (cont’d):
• Using Colleague Budget Management
  ✓ DWSR Detail Worksheet Report
  ✓ ODWP Officer Detail Worksheet Report
  ✓ BCMP Budget Comparison Report
  ✓ OWLI Officer Worksheet Line Item
  ✓ BJNS Justification notes / scenarios
  ✓ RWKS Responsibility Worksheet Summary
  ✓ RWLI Responsibility Worksheet Line
  ✓ OWKS Officer Worksheet Summary

For more Technical Training information, visit:
http://info.csmd.edu/Training/technical

Or contact:
Technical Training Coordinator
Wendy Cleary
Ext. 7610, email wendyc

Technology Associate
Debbie Proctor
Ext. 7729, email debrap

BudgetManagement.ppt updated 8/31/2018