General Description: This procedure explains how to lock and unlock organizations within Budget Development. Organizational locks at higher organizational levels prevent users with subordinate organizational security from making changes to indices within the “Create Budget Worksheet” option. The locking process has a cascading effect; when you lock/unlock an organization, all organizations beneath it become locked/unlocked as well. Also, you cannot lock or unlock the highest organization for which you have access.

Responsible Manager: Office of Planning, Budget and Analysis (OPBA)  
HSC Budget Office

Important Information

- The Budget Planner lock dates are listed in The UNM Budget Development Calendar. This calendar is posted on the OPBA web site http://budgetoffice.unm.edu/.
- Organization hierarchy information can be found on the E-Print report FGRORGH, Organization Hierarchy Report.

Things to Remember

- Locked = Approved
- Unlocked = Unapproved and changes can be made to indices within “Create Budget Worksheet”
- You cannot lock or unlock the highest organization for which you have access. For example, if David has access to ABC - Level 3 organization he can:
  o update all indices under the organization ABC in “Create Budget Worksheet”
  o lock/unlock all of the organization ABC subordinate orgs
  o however, he cannot lock/unlock the ABC organization code
- An asterisk (*) next to a locked organization status indicates that a subordinate organization is unlocked
- Locks/unlocks cascade downward

Lock or Unlock an Organization

1. Login to myUNM
2. Login to LoboWeb using one of the three options listed below:
   - Click on “ENTER LOBOWEB” in the LoboWeb (Employees) section. Then select the “Finance” tab
   - Click on “Finance” in the Quick links
   - Click on “LoboWeb” in the UNM Business Applications section. Then select the “Finance” tab
3. Click on the “Budget Planner Menu”

4. Click on “Maintain Organization Lock”

5. **Chart of Accounts**: enter “U”

6. **Budget**: enter “BUDxx” (the new fiscal year to be locked or unlocked)

7. **Phase 1**: enter “ADOPTD” (the budget phase to be locked or unlocked)

8. **Current Status**: Click on the down arrow to select the appropriate lock status
   - a. All = Lists all organizations, locked and unlocked
   - b. Locked = List only locked organizations
   - c. Unlocked = List only unlocked organizations

9. **Organization**: Enter the organization code to be locked/unlocked or leave the field null
10. Click “Submit”
11. Review the “Parameters” section
   a. Ensure the correct information displays in the upper left hand section of the screen

12. In the “Organization Lock Status” section, if an organization code is underlined and displayed in blue, it allows for drill down to the next set of subordinate organizations and displays the organization lock/unlock “Current Status”
13. To make lock/unlock changes, check the box of the organization in “Change Status”. Select “Review” to see the records marked for change or “Update” to change the status of marked records.

   a. Locking or unlocking an organization will lock or unlock all subordinate organizations. Applying Lock/Unlock status cascades downward. **Note:** See a message display indicating that the changes submitted have been applied.

   b. An asterisk on a Locked * organization indicates at least one subordinate organization is unlocked.
14. Click “Return To Parameters”
   a. Enter the same information again to review the status and ensure the locks/unlocks have been placed successfully
   b. Select another organization code to be locked/unlocked
15. To exit the Budget Development Organization Lock screen, click on “RETURN TO BUDGET DEVELOPMENT MENU” at the top right of the screen