



BUDGET PLANNER

PROJECTED ACTUALS REPORT

PA-107 Projection Indices Not Modified Report

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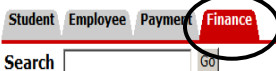
General Description: The Main Campus report only lists current unrestricted indices and the HSC report lists current unrestricted and restricted indices with YTD actual activity that DO NOT have inputted changes to account code projected amounts. If the index account code projected amount has been updated in any way, (even if the projected amount is zero), the index will not display in this report.

Purpose: This report displays indices that have not been modified in the projection system for any combination of fund, organization and/or program.

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

Navigating to the Projected Actuals Reports Menu

1. Login to my.unm.edu
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 “Projected Actuals Reports Menu”
5. Click on “Projection Indices Not Modified Report”



[RETURN TO BUDGET PLANNER MENU](#) [SITE MAP](#) [HELP](#)



Projected Actuals Reports Menu

Projections Working Report

Reports projected actuals by index or any combination of fund, organization, and/or program summarized by account.

Budget to Projected Actuals Report

Reports projected actuals by index or any combination of fund, organization, and/or program summarized by account type.

HSC Budget Year Financial Projections Report

Reports projected actuals summarized by organization.

Main Campus Current Unrestricted Financial Projections by Exhibit Report

Reports main campus current unrestricted financial projections summarized by exhibit.

Projected Net Reserve By Index Report

Reports projected net reserve summarized by index.

Projection Indices Not Modified Report

Reports projection indices that were not modified.

Select the Report Parameters

6. Select the Budget ID and Budget Phase
 - a. Note: the Budget ID and Budget Phase should always be the current Fiscal Year (BUDxx and PROJxx).
7. The Fiscal Year defaults to the current Fiscal Year
8. The Fiscal Period defaults to 06 (December)
 - a. **Mid-year projections are always based on Fiscal period 06 (December)**, however, the Projections System is open year-round, allowing prior Budget ID, Budget Phase, Fiscal Year, and Fiscal Period to be selected for department reporting.

The screenshot shows the 'Projection Indices Not Modified Report' form. A red bar at the top right contains the text 'EXIT'. The form fields are: Chart of Accounts (U), Budget ID, Budget Phase, Budget, Fiscal Year, Fiscal Period (06), Organization, Fund, and Program. A 'Submit' button is circled. Callouts include: 'Chart of Accounts: U', 'Budget ID: Current Fiscal Year - BUDxx', 'Budget Phase: Current Fiscal Year - PROJxx', 'Fiscal Year: Defaults to Current Fiscal Year', 'Fiscal Period: Defaults to 06 (December)', and 'Enter: Organization, Fund and/or Program'.

9. Enter the report parameters by **Organization, Fund and/or Program**
 - Remember, the more information that is entered into the Organization, Fund and Program fields, the less time the system takes to generate the data
 - Organization code levels 1 through 7
 - Fund code levels 2 or 3
 - Program code levels 2 or 3
10. Click "Submit"

While the system is compiling the report information, a white window is displayed. Once the report information is compiled, it will display the report.



What does the report display

YTD Actual Amount column

- Current index YTD Actual balance in Banner for the Fiscal Year and Fiscal Period selected

***** END *****