Navigating to the Projected Actuals Reports Menu

1. Login to my.unm.edu
2. Enter LoboWeb and access the Finance Menu 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. Select the “Projected Net Reserve By Index Report”
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.

Projected Net Reserve By Index Report

Reports Parameter Page

9. Enter the report parameters by **Organization, Fund** and/or **Program**
   
   - Organization code levels 1 through 7
   - Fund code levels 2 or 3
   - Program code levels 2 or 3

   The more information that is entered into the Organization, Fund and Program fields, the less time the system takes to generate the data

10. Click “Submit”

   While the system is compiling the report information, a blank window is opened. Once the report information is compiled, it will display the report in the new window.
**What does the report display?**

- There are subtotals shown for each organization and at the end of the report there is a summary total for all of the indices listed in the report for the organization selected.
- The Projected Revenues column contains projected year-end balances from all the revenue account codes.
- The Projected Expenditures column contains projected year-end balances from all the expense account codes.
- The Projected Net Reserve column displays the Projected Net Reserve amount (Projected Revenues less Projected Expenditures).

***END***