BUDGET PLANNER

BUDGET DEVELOPMENT

Organizational Lock

Date Issued/Revised: 12/01/2022

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.
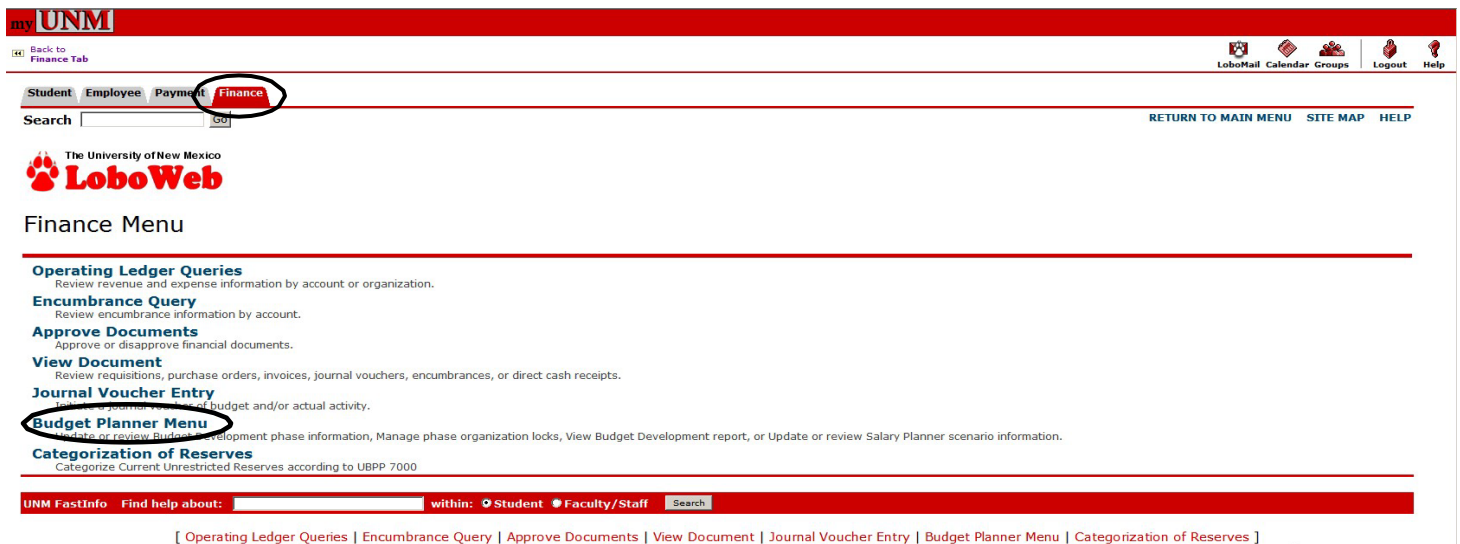
Things to Remember

- 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

Maintain Organization Lock

💬 Chart, Budget ID and at least one Phase required. Select Default Phases to default phase info[...] ve Organization null to start with highest organizations(s) you are authorized to change, or designate a starting point.

Chart of Accounts	U

Chart of Accounts will always be: **U**
Budget: **BUDxx (new fiscal year)**
Phase 1: **ADOPTD**

Budget		Default Phases
Phase 1		Phase 2		Phase 3	

"**Phase 2**" and "**Phase 3**" should be left empty

Current Status Locked ▾

Select All, Locked or Unlocked from the drop down box

Organization	

Submit

If the Organization field is left null, it returns the highest organization authorized to be locked and/or unlocked

10. Click "Submit"
11. Review the "Parameters" section

    a. Ensure the correct information displays in the upper left hand section of the screen

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Budget Development Organization Lock

Parameters

Chart of Accounts	U	University of New Mexico
Budget ID	BUD19	2019 Budget ID
Phase 1	ADOPTD	2019 Adopted Phase
Phase 2		
Phase 3		
Lock Status	Locked	
Organization	ABC	School of Public Administration

Review the parameters

Organization Lock Status

Organization	Title	2019 Adopted Phase Current Status	Change Status
ABC	School of Public Administration	Locked	☐

Review
Update

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"

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Budget Development Organization Lock

Parameters

Chart of Accounts	U	University of New Mexico
Budget ID	BUD19	2019 Budget ID
Phase 1	ADOPTD	2019 Adopted Phase
Phase 2		
Phase 3		
Lock Status	Locked	
Organization	ABC	School of Public Administration

Organization Lock Status

Organization	Title	2019 Adopted Phase	
		Current Status	Change Status
ABC	School of Public Administration	Locked *	☐

Review
Update

Check the box to make lock/unlock changes

Drill down option

Status

An asterisk on a **Locked** * record indicates at least one subordinate organization is Unlocked

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

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Budget Development Organization Lock

Parameters

Chart of Accounts	U	University of New Mexico
Budget ID	BUD19	2019 Budget ID
Phase 1	ADOPTD	2019 Adopted Phase
Phase 2		
Phase 3		
Lock Status	Locked	
Organization	ABC	School of Public Administration

Organization Lock Status

Organization	Title	2019 Adopted Phase	
		Current Status	Change Status
ABC	School of Public Administration	Locked *	☐

Review
Update

| Student | Employee | Payment | Finance |

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Budget Development Organization Lock

✔ Lock changes submitted have been applied.

[Return To Parameters]

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

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