

MAIN CAMPUS BUDGET PLANNER FOR NEW USERS

Overview

- Objectives
- How do you prepare for the annual Budget Planner process?
- Entering your data into Budget Planner
- Final steps

Objectives

- Purpose: All departments must key their budgets for all unrestricted indices into the Budget Planner System.
- This training will:
 - Explain the process
 - Provide an overview of what you need to know before you get started
 - Tell you how to get access to the system
 - Show you how to navigate the system and reports
 - Show you where to go to find additional resources and information

How do you prepare?

I. Get Access

1. New users must take the Budget Planner Online Course and pass the Budget Planner Proficiency Exam on Learning Central
2. Submit a Banner Authorization Request (BAR) to request the following roles:
 - Department General Inquiry
 - Department Budget Developer
 - Request only highest level organization code – workflow recognizes org hierarchies
 - Department Salary Planner
 - Request highest level Salary Planner organization(s) that you need in Salary Planner

How do you prepare?

II. Meet with your Fiscal Agent/Dean/Director

1. Review all unrestricted indices in your organization.
2. If there are additional staff in your department who will be involved in the Budget Planner process, discuss each person's role and responsibilities.
3. Review the current year budget for each index as it compares to actual revenue and expenditure activity within the index.

How do you prepare?

II. Meet with your Fiscal Agent/Dean/Director (cont'd)

3. Discuss changes for the upcoming year that needs to be entered into the system:
 - Revenue sources and amounts for each unrestricted index
 - I&G allocations will be released per the Budget Development Calendar posted on the OPBA website.
 - Check with your VP Unit for additional dates.
 - Faculty, Staff and Student salary amounts, distributions, FTEs, SACs, etc.

Note: The system will automatically pull in original budgeted revenue and expenditure budgets from the current fiscal year.

How do you prepare?

- II. Meet with your Fiscal Agent/Dean/Director (cont'd)
 - 4. Determine if you have a need to request new indices through the Chart of Accounts (COA) Request Application. (See calendar for deadlines)
 - 5. Review and become familiar with budget guidelines, standard operating procedures (SOPs) and FAQs - located on the OPBA website.

General Info

- All unrestricted indices that will have fiscal year revenue and expenditure activity must be budgeted. Departments must key the budgets into the Budget Planner System.
- The system is generally open from March to April for Departments and Divisions/Colleges/Schools. Important dates and deadlines are posted on the OPBA website.
- The budget keyed during March and April is for the next fiscal year beginning July 1 and ending June 30.

Entering your data into Budget Planner

**Salary Planner + Budget Development =
Budget Planner**

Salary Planner – enter position budgets for all faculty, staff and pooled positions. Enter salary, distribution and FTE changes.

Budget Development – enter current unrestricted budgets for revenues, allocations, transfers, fringe benefits, and non-salary expenses by index.

Begin the budget entry process with Salary Planner

SALARY PLANNER

MyUNM - Windows Internet Explorer
https://my.unm.edu/tag.f9e2a5b10e88be9f.render.userLayoutRootNode.uP?uP_root=root&uP_sparam=activeTab&activeTab=u281s17&uP_tparam=frm&frm=
UNM Logo

MyUNM

The University of New Mexico [YOUR PERSONALIZED GATEWAY TO UNM]

Welcome John Doe
You are currently logged in.

My Account
Content Layout

E-mail Calendar Groups Logout Help

Home Campus Life Library UNM E-Mail **Employee Life** Finance

Human Resources

General Information

- HR Main Page
- ePAN
- Salary Structure Table
- Standard Timesheet for Staff (PDF)
- Standard Timesheet for Staff (Excel)

Career Development

- Career Development Main Page
- Education and Training
- Job Enrichment
- Career Ladders

Staff Resources

- Counseling Assistance and Referral Services (CARS)
- Dispute Resolution
- Lesbian, Gay, Bisexual, Transgender, and Questioning (LGBTQ) Resource Center
- HR Consulting Services
- Office of Equal Opportunity (OEO)
- Training (Employee and Organizational Development - EOD)
- Wellness (Employee Health Promotion Program - EHPP)

LoboWeb For Employees

No current announcements.

What is LoboWeb?
LoboWeb is the place for employees to view/update personal information, benefits and deductions, pay information, tax forms and more.

Enter LoboWeb

Due to scheduled backups, LoboWeb is unavailable
Saturday 7:00 pm - 9:30 pm.

UNM Business Applications

Transaction and Real-time Query Systems

- Internet Native Banner
- LoboWeb
- LoboMart
- UNMJobs
- Workflow

Reporting

- E-Print
- Hyperion

Banner Resources

- Banner Authorization Requests
- Report a Duplicate Person/Non-person
- Search Class Schedule
- Search Course Catalog
- Electronic Forms
- Purchasing Department Website

Space Management

- Self-Service: Space Information & Floor Plans
- Discover Viewer: Reports
- Space Management Website
- Contacts: space@unm.edu or 277-3800

Whats New in HR

- Performance Review Best Practices - Examples of Individual Ratings - Due March 1, 2011
- Wellness Champion - Congratulations Joe Romero - UNM Community Wellness

Trusted sites | Protected Mode: Off | 150%

GO TO YOUR INTERNET BROWSER AND LOGON TO
MY.UNM.EDU
ENTER YOUR **LOGON** AND **PASSWORD**
CLICK ON **EMPLOYEE LIFE** TAB
CLICK ON **LOBO WEB**

MyUNM - Windows Internet Explorer
https://my.unm.edu/cp/render.UserLayoutRootNode.up?up_tparam=utf&utf=%2Fcp%2Fip%2Flogin%3Fsys%3Dscstsb%26api%3Dpmenu%2EP%5FMainMnu

myUNM

Back to Employee Life Tab

E-mail Calendar Groups Logout Help

- Make Bursar Payments**
Pay Bursar billed insurance, parking tickets, etc. by credit card, checking or savings account.
- Electronic Personnel Action Forms**
Labor Distribution Change
- Benefits and Deductions**
Retirement, Health, Flexible Spending, Miscellaneous, Beneficiaries, Benefit Statement
- Pay Information**
Direct Deposit, Earnings History, Deductions History, Pay Stubs
- Tax Forms**
W4 Form, W2 Statement
- Jobs Summary**
List of Jobs and Associated Transactions
- Leave Balances**
List of Leave Balances
- Salary Planner**
Update Position Budgets, Job Salary and Labor Distribution for the Upcoming Fiscal Year
- Time Sheet (Approvals and View Only)**
Departmental Time Entry Approvals and View
- Labor Redistribution**
New! Allows administrative staff to create and approve labor redistribution transactions.

UNM FastInfo Find help about: within: Student Faculty/Staff Search

RELEASE: 8.4.1

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Done Trusted sites | Protected Mode: Off 150%

Click on the "SALARY PLANNER" link

Employee Payment Finance

Search Go

RETURN TO MENU SITE MAP HELP

Salary Planner

Create Scenario

Create a new salary planner scenario from a salary planner extract.

Copy Scenario

Copy a salary planner scenario to a new salary planner scenario.

Edit Scenario

Update salary planner scenario information.

Organization Lock

Lock or unlock salary planner organization locks.

Query Multiple Extracts

View multiple salary planner scenarios by organization.

Salary Planner Reports Menu

View Salary Planner reports.

Budget Planner Menu

Update or review Budget Development phase information, Manage phase organization locks, or view Budget Development reports.

Click on "Edit Scenario"

UNM FastInfo Find help about: within: Student Faculty/Staff Search

RELEASE: 8.4.1

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MyUNM - Windows

12FAC09
12FAC10
12FAC11
9FAC09
9FAC10
9FAC11
CSTAFF10
CSTAFF11
CWA09
CWA10
CWA11
HSTAFF09
HSTAFF10
HSTAFF11
POLICE09
POLICE10
POLICE11
POOL09
POOL10
POOL11
RSTAFF09
RSTAFF10
RSTAFF11
USUNM09
USUNM10
USUNM11

Back to Employee Life

Employee

Search

Edit Scenario

Choose

Scenario Selection

Extract ID: 12FAC09

Scenario: 12 MO FACULTY 09

Filter Criteria

By Position Attributes:

By Employee Name:

Select

Scenario, then select filter criteria.

RETURN TO SALARY PLANNER MENU SITE MAP HELP

THERE ARE NINE (9) SCENARIOS FOR DEPARTMENTS TO SELECT FROM
Extract ID and Scenario must be selected in combination as listed below

Extract ID:	Scenario:
12FACxx	12 MO FACULTY xx
9FACxx	9 MO FACULTY xx
HSTAFFxx	HOUSESTAFF xx
RSTAFFxx	REG STAFF xx
POOLxx	POOLED POSITIONS xx
CSTAFFxx	CONTRACT STAFF xx

UNION SCENARIOS

CWAxx	CWA BARG UNIT xx
POLICExx	POLICE BARG UNIT xx
USUNMxx	USUNM BARG UNIT xx

THERE ARE TWO FILTER CRITERIA:
BY POSITION ATTRIBUTES (WILL SELECT ALL POSITIONS) – DEFAULT OPTION
BY EMPLOYEE NAME (WILL SELECT ONE EMPLOYEE AT A TIME)

CLICK ON SELECT BUTTON AT BOTTOM OF SCREEN

Extract ID & Scenario will always be the same. Select choice with current fiscal year (i.e., POOL16, 9FAC16)

UNM FastInfo Find help about: within: Student Faculty/Staff Search

Trusted sites | Protected Mode: Off

MyUNM - Windows Internet Explorer
https://my.unm.edu/cp/render.UserLayoutRootNode.uP?uP_tparam=utf&utf=%2Fcp%2Fip%2Flogin%3Fsys%3Dscstsb%26api%3Dpmenu%2EP%5FMainMnu

my **UNM**

Back to Employee Life Tab

E-mail Calendar Groups Logout Help

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

12FACxx, 12 MO FACULTY xx

Organizations: All
013A - Continuing Medical Educ Department
013B - Continuing Med Educ Gen Admin

Include Subordinate Organizations:

Employee Class: All
FE - Executive Faculty
FY - 12 Month Faculty

Bargaining Unit: All
None

Faculty Rank: All
None

Include Pooled Positions:

Include Vacant Positions:

Number of Records per Page: 100

List By Employee Summary Totals List By Position

Employee Filter

Trusted sites | Protected Mode: Off 150%

Select which organization number you would like to see, or choose all. (You will only see orgs that you have access to.)

Employee Classes for org selected will show. Select All to see all the Employee Classes listed.

You may select 25, 50 or 100 records to view all at once.

List By Employee

List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

Mass Change

Hourly or Salary: Hourly Salary

Reason: Annual Salary Increase

Percent	Amount	Include in Change Totals
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

A percent or amount may be entered to mass apply a change of salary to all those who have been selected. Enter change percent or amount and click "Mass Apply".

Proposed Salary is the rate the employee will be paid come July 1st or August 1st (Faculty) as their Base Salary in NBAJOBS.

[Jump to Bottom](#)

023A SOE Mechanical Engineering, Locked, Updateable

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals		Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded from Totals
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent						
100000000	FY0160 - 00 Research Assoc Professor	38.30	29,490.96	38.30	38.30	29,490.93	.00	.00	29,490.93	Changed	No
101340000	FY1015 - 00 Research Assoc Professor	87.50	93,730.00	87.50	87.50	93,730.00	.00	.00	93,730.00	Changed	No
100020000	FY0965 - 00 Research Assoc Professor	100.00	55,000.00	100.00	64.00	55,000.00	.00	.00	35,200.00	Changed	No
Total:						178,220.93	.00	.00	158,420.93		

Click on ID to go to Employee Detail

This will reflect if something has been added or changed from the refresh process

Totals

Organization	Base Salary	Change Percent	Change Amount	Proposed Salary
023A - SOE Mechanical Engineering	178,220.93	.00	.00	158,420.93
Total:	178,220.93	.00	.00	158,420.93

12FAC15, 12 MO FACULTY 15

Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
023A - SOE Mechanical Engineering	Yes	All	All	All	Yes	Yes

Organizations with No Employees

Records 1 - 3 of 3

NOTE: IF CHANGES HAVE BEEN SAVED, YOU MUST APPLY A ZERO VALUE TO RESET AND THEN SAVE.

To change the salary on an individual Job, choose to enter manually either a percentage or amount and TAB OUT! DO NOT USE THE MOUSE AND CLICK OUT

[Return to Top](#)

[List By Position](#) | [Summary Totals](#)
[Employee Filter](#) | [Position Filter](#)

Organization	Base Salary	Change Percent	Change Amount	Proposed Salary
023A - SOE Mechanical Engineering	178,220.93	.00	.00	158,420.93
Total:	178,220.93	.00	.00	158,420.93

List By Employee Cont.

12FACxx – 12 MO FACULTY xx

Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
023A - SOE Mechanical Engineering	Yes	All	All	All	Yes	Yes

Organizations with No Employees

Records 1 - 3 of 3

Don't forget to hit SAVE!

Save Reset

You can double check all employee salaries by downloading the spreadsheet with or without labor.

Download Job Data Download Job and Distribution

Return to Top

List By Position Summary Totals Employee Filter Position Filter

Edit Scenario

LINKS (BOTTOM OF SCREEN)
Return to Top – CLICK ON THIS LINK TO GO TO TOP OF LIST BY EMPLOYEE SCREEN
List by Position – CLICK ON THIS LINK TO GO TO LIST BY POSITION SCREEN
Summary Totals – CLICK ON THIS LINK TO GO TO SUMMARY TOTALS SCREEN
Employee Filter – CLICK ON THIS LINK TO GO TO EMPLOYEE FILTER SCREEN
Position Filter – CLICK ON THIS LINK TO GO TO POSITION FILTER SCREEN
Edit Scenario -- CLICK ON THIS LINK TO GO BACK TO EDIT SCENARIO SCREEN

Search Go

Employee Detail

Enter a Mass Change and select Mass Apply, or modify an individual Job record. Select Save before accessing another page.

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

Mass Apply

Employee

Name and ID:
 Home Organization: 624A - Cell Biology
 Last Review Rating: -

Extracted Jobs

Position Suffix and Title	Organization	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Annual Salary Increase Percent	Annual Salary Increase Amount	Percent	Amount	Proposed Salary	Links	Exclude from Totals
FY0485 - 00 Professor	624A - Cell Biology	100.00	100.00	159,369.45	.00	.00	.00	.00	159,369.45	Job Detail Distribution Comments Position Detail	<input type="checkbox"/>
Total:				159,369.45	.00	.00	.00	.00	159,369.45		

Extract Totals

Organization	Base Salary	Change Percent	Change Amount	Proposed Salary
624A - Cell Biology	159,369.45	.00	.00	159,369.45
Total:	159,369.45	.00	.00	159,369.45

Don't forget to hit SAVE!

Save Next

[List By Employee](#) |
 [List By Position](#) |
 [Position Filter](#) |
 [Employee Filter](#) |
 [Summary Totals](#)

IF INCREASES ARE TO BE APPLIED INDIVIDUALLY, CLICK ON EITHER CHANGE PERCENT or CHANGE AMOUNT BASED ON PREFERENCE
 CHANGE PERCENT BOX - ENTER CHANGE PERCENT IF APPLYING A SPECIFIC PERCENTAGE INCREASE
 CHANGE AMOUNT BOX - ENTER CHANGE AMOUNT IF APPLYING A SPECIFIC DOLLAR INCREASE

AFTER ENTERING INTO EITHER THE CHANGE PERCENT OR CHANGE AMOUNT BOX, PRESS TAB BUTTON TO SEE RESULT OF INCREASE

LINKS (RIGHT SIDE OF SCREEN)

- [Job Detail](#) - CLICK ON THIS LINK TO GO TO JOB DETAIL SCREEN
- [Distribution](#) - CLICK ON THIS LINK TO GO TO JOB LABOR DISTRIBUTION SCREEN
- [Comments](#) - CLICK ON THIS LINK TO GO TO JOB COMMENTS SCREEN
- [Position Detail](#) - CLICK ON THIS LINK TO GO TO POSITION DETAIL SCREEN

LINKS (BOTTOM OF SCREEN)

- [List by Employee](#) - CLICK ON THIS LINK TO GO TO LIST BY EMPLOYEE SCREEN
- [List by Position](#) - CLICK ON THIS LINK TO GO TO LIST BY POSITION SCREEN
- [Position Filter](#) - CLICK ON THIS LINK TO GO TO POSITION FILTER SCREEN
- [Employee Filter](#) - CLICK ON THIS LINK TO GO TO EMPLOYEE FILTER SCREEN
- [Summary Totals](#) - CLICK ON THIS LINK TO GO TO SUMMARY TOTALS SCREEN

Job Detail

Change Job Appointment Percent and select Save.

Employee

Name and ID: []
Home Organization: 624A - Cell Biology

* - indicates a required field.

Job Detail for Position and Suffix FY0485

Model:	Proposed Jul 01, 2014	Base Jul 01, 2013	Current Jul 01, 2014
Effective Date:			
Title:	Professor	Professor	Professor
Hourly Rate:	76.621401	76.621401	76.621401
Annual Salary:	159,369.45	159,369.45	159,369.45
Total Change Percent:	.00		
Total Change Amount:	.00		
Appointment Percent: *	<input checked="" type="checkbox"/> 100.00	<input type="checkbox"/> 100.00	<input type="checkbox"/> 100.00
FTE:	1	1	1
Hours per Day:	8.00	8.00	8.00
Hours per Pay:	173.33	173.33	173.33
Salary Group:	2011	2010	2011
Table:		FA	FA FA
Grade:	99	99	99
Step:		0	0 0
Budget Factor:	100.00		
Estimated Fiscal Year Budget:	159,369.45		
Exclude from Totals:	<input type="checkbox"/>		

THIS SCREEN HAS TWO UPDATEABLE FIELDS, THE **APPOINTMENT PERCENT** AND **EXCLUDE FROM TOTALS**. THE **APPOINTMENT PERCENT** BOX IS FOR VALUES FROM 1-100%. THE **EXCLUDE FROM TOTALS** CHECK BOX WILL EXCLUDE SALARY FROM ORG TOTALS WHEN CHECKED.

NOTE: IF CHANGES ARE CORRECT, SAVE THE CHANGES. CHANGES ARE SAVED BY CLICKING SAVE BUTTON AT BOTTOM OF SCREEN.

Base Job

Begin Date: Jan 01, 2008
End Date:
Job Status: Active
Salary Type: Salary
Rank:
Tenure Status:
EPAF Transaction #: 60389

Don't forget to hit SAVE!

LINKS (BOTTOM OF SCREEN)

- Distribution – CLICK ON THIS LINK TO GO TO JOB LABOR DISTRIBUTION SCREEN
- Position Detail – CLICK ON THIS LINK TO GO TO POSITION DETAIL SCREEN
- Comments – CLICK ON THIS LINK TO GO TO JOB COMMENTS SCREEN
- List by Employee – CLICK ON THIS LINK TO GO TO LIST BY EMPLOYEE SCREEN
- List by Position – CLICK ON THIS LINK TO GO TO LIST BY POSITION SCREEN
- Employee Detail – CLICK ON THIS LINK TO GO TO EMPLOYEE DETAIL SCREEN
- Position Filter – CLICK ON THIS LINK TO GO TO POSITION FILTER SCREEN
- Employee Filter – CLICK ON THIS LINK TO GO TO EMPLOYEE FILTER SCREEN
- Summary Totals – CLICK ON THIS LINK TO GO TO SUMMARY TOTALS SCREEN

[Distribution](#) | [Default Hours](#) | [Position Detail](#) | [Comments](#)
[List By Employee](#) | [List By Position](#) | [Employee Detail](#) | [Position Filter](#) | [Employee Filter](#) | [Summary Totals](#)

Search Go

Job Labor Distribution

Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

Name and ID:
Position-Suffix and Title: FY0485-00 Professor
EPAF Transaction #: 60389

Current

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount
U	889025	2U0224	889C	2000	P108	GNACTV					50.00	79,684.73
U	524104	3U0032	524B	2000	P222	524B15					7.69	12,255.51
U	914059	3U0044	914C	2000	P121	GNACTV					42.31	67,429.21
Total											100.00	159,369.45

Proposed

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount	Del
U	914059	3U0044	914C	2000	P121	GNACTV					45.49	72,497.16	X
U	524104	3U0032	524B	2000	P222	524B15					4.51	7,187.56	X
U	889025	2U0224	889C	2000	P108	GNACTV					50.00	79,684.73	X
Total											100.00	159,369.45	

Proposed Position Distribution

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount
U	914059	3U0044	914C	2000	P121	GNACTV					45.49	72,497.00
U	524104	3U0032	524B	2000	P222	524B15					4.51	7,188.00
U	889025	2U0224	889C	2000	P108	GNACTV					50.00	79,685.00
Total											100.00	159,370.00

[Employee Detail](#) | [Job Detail](#)
[List By Employee](#) | [List By Position](#) | [Summary Totals](#)

THIS SCREEN IS USED TO UPDATE BOTH JOB AND POSITION LABOR DISTRIBUTIONS
CURRENT SECTION DETAILS THE EXISTING JOB RECORD LABOR DISTRIBUTION

PROPOSED SECTION DETAILS THE PROPOSED JOB RECORD LABOR DISTRIBUTION
 THE INDEX FIELD CAN BE UPDATED WITH NEW OR DIFFERENT VALUE
 THE ACCOUNT FIELD CAN BE UPDATED WITH NEW OR DIFFERENT VALUE BUT SHOULD FOLLOW ACCOUNT CODE RULES (NOTE: TRANSACTION WILL ERROR IF ACCOUNT CODE 2005 IS USED, THIS IS NOT A VALID ACCOUNT VALUE IN SALARY PLANNER)
 THE PERCENT FIELD IS THE PERCENT OF ALLOCATION TO THIS INDEX; MULTIPLE LABOR DISTRIBUTION INDICES MUST TOTAL 100%
 THE X BUTTON WILL DELETE THIS LINE OF LABOR DISTRIBUTION

PROPOSED POSITION DISTRIBUTION SECTION DETAILS THE PROPOSED POSITION BUDGET RECORD LABOR DISTRIBUTION

BUTTONS

ADD NEW RECORD -- WILL ADD ADDITIONAL LABOR DISTRIBUTION LINES
SAVE -- THIS BUTTON WILL SAVE ANY CHANGES TO LABOR DISTRIBUTIONS ADDITONS, CHANGES, OR MODIFICATIONS
COPY POSITION DISTRIBUTION TO JOB -- WILL COPY POSITION RECORD LABOR DISTRIBUTION STRATEGY TO JOB RECORD LABOR DISTRIBUTION (NOTE: COPY TRANSACTION WILL ERROR IF ACCOUNT CODE 2005 IS USED IN THE POSITION LABOR DISTRIBUTION)
COPY JOB DISTRIBUTION TO POSITION -- WILL COPY JOB RECORD LABOR DISTRIBUTION STRATEGY TO POSITION RECORD LABOR DISTRIBUTION.

Search Go

Job Comments

Name and ID:

Position-Suffix and Title: FY0485-00 Professor

Last Updated by: Alex Jacob Lopez

Last Updated on: Mar 19, 2015

Comments:

THIS SCREEN IS TO BE USED TO ENTER SPECIFIC DETAILS AND JUSTIFICATIONS RELATED TO SALARY CHANGES OUT OF RANGE, APPOINTMENT PERCENT CHANGES, CARRER LADDERS, AND ANY OTHER RELEVANT INFORMATION.

BUTTONS
SAVE -- THIS BUTTON WILL SAVE ANY COMMENTS
RESET -- THIS BUTTON WILL RESET VALUES TO ORIGINAL

[Employee Detail](#) | [Job Detail](#)

List By Position

Enter a Mass Change and select Mass Apply, or modify an individual position

Mass Change

Percent:

Amount:

MASS CHANGE SECTION -- THIS SECTION IS TO MASS APPLY POSITION BUDGET INCREASES (DO NOT USE THIS SECTION IF NOT MASS APPLYING INCREASES)
PERCENT BOX -- ENTER A PERCENT TO MASS APPLY
AMOUNT BOX -- ENTER A DOLLAR AMOUNT TO MASS APPLY

CLICK ON **MASS APPLY** BUTTON FOR MASS APPLY OPTIONS TO BE APPLIED

IF SATISFIED WITH MASS APPLY CLICK ON **SAVE** BUTTON AT BOTTOM OF SCREEN

Jump to Position

023A - SOE Mechanical Engineering, Locked, Updateable

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Estimated Fiscal Year	Links	Extract Status	Exclude from Totals
FY0160 Research Assoc Professor	100.00	100.00	1	.383	68,251.00	12.82	8,749.00	77,000.00		29,490.93	Distribution Comments		<input type="checkbox"/>
FY0965 Research Asst Professor	100.00	100.00	1	.64	55,000.00	.00	.00	55,000.00		35,200.00	Distribution Comments		<input type="checkbox"/>
FY1015 Research Assoc Professor	100.00	100.00	.95	.875	98,800.00	8.42	8,320.00	107,120.00		93,730.00	Distribution Comments		<input type="checkbox"/>
FY1017 Research Professor	100.00	100.00	.19	0	22,230.00	-100.00	-22,229.00	1.00		.00	Distribution Comments*		<input type="checkbox"/>
FY1101 Research Professor	100.00	100.00	1	0	144,000.00	-100.00	-144,000.00	.00		.00	Distribution Comments*		<input type="checkbox"/>
Total:			4.14	1.90	388,281.00	-38.42	-149,160.00	239,121.00		158,420.93			

Summary

Organization	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget
023A - SOE Mechanical Engineering			4.14	1.90	388,281.00	-38.42	-149,160.00	239,121.00
Total:			4.14	1.90	388,281.00	-38.42	-149,160.00	239,121.00

12FACxx, 12 MO FACULTYxx

Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
023A - SOE Mechanical Engineering	Yes	All	All	All	Yes	Yes

Organizations with No Positions

Records 1 - 5 of 5

BUTTONS
 COPY ESTIMATED BUDGET TO BUDGET TO UPDATE ALL POSITIONS TO MATCH JOB AMOUNTS
 CLICK ON **DOWNLOAD POSITION DATA** BUTTON TO OPEN OR SAVE JOB DATA TO AN EXCEL SPREADSHEET
 CLICK ON **DOWNLOAD POSITION AND DISTRIBUTION** BUTTON TO OPEN OR SAVE JOB AND LABOR DISTRIBUTION DATA TO AN EXCEL SPREADSHEET

[Return to Top](#)

[List By Employee](#) | [Summary Totals](#)
[Employee Filter](#) | [Position Filter](#)

Position Detail

Mass Changes

Percent:
Amount:

Apply

THIS SECTION IS TO MASS APPLY SALARY INCREASE/(DECREASE) TO THIS EMPLOYEE
PERCENT BOX – ENTER A PERCENT TO MASS APPLY
AMOUNT BOX – ENTER DOLLAR AMOUNT TO MASS APPLY

CLICK ON **APPLY BUTTON** FOR MASS APPLY OPTIONS TO BE APPLIED

THE **FTE BOX** WILL CHANGE THE FTE VALUE ON THE POSITION RECORD
THE **EXCLUDE FROM TOTALS CHECK BOX** WILL EXCLUDE SALARY FROM ORG TOTALS WHEN CHECKED

* - indicates a required field.

Budget Detail for Position FY0246 Associate Professor

Model:	Proposed	Base Current
Fiscal Year Budget:	101,174.00	94,493.00
FTE: *	<input type="text" value="1"/>	<input type="text" value="1"/>
Appointment Percent:	100.00	100.00
Total Salaries:	101,174.00	94,493.00
Estimated Fiscal Year Budget:	101,174.00	
Exclude from Totals:	<input type="checkbox"/>	

Position

Organization: 624A - Cell Biology

Type: Single

Begin Date: Jul 01, 2015

End Date:

Status: Active

Save Reset Next

[Position Distribution](#) | [Position Budget Comments](#) | [Employee List By Employee](#) | [List By Position](#) | [Summary Totals](#)

Search Go

Position Labor Distribution

Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

Budget Distribution for Position FY0246 Associate Professor.

Current

COA Index	Fund	Organization Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U 624000	3U0044	624C0	2000	P101				30.00	30,352.00
U 624176	362V0	624C04	2000	P16R				65.00	65,762.00
U 624185	372N0	624C12	2000	P16R				5.00	5,060.00
Total								100.00	101,174.00

Proposed

COA Index	Fund	Organization Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Del
U 624000	3U0044	624C0	2000	P101				30.00	30,352.00	X
U 624176	362V0	624C04	2000	P16R				65.00	65,762.00	X
U 624185	372N0	624C12	2000	P16R				5.00	5,060.00	X
Total								100.00	101,174.00	

Add New Record

Current Incumbent

Name and ID:
 Position-Suffix and Title: FY0246-00 Assistant Professor

COA Index	Fund	Organization Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U 624000	3U0044	624C0	2000	P101				30.00	30,352.20
U 624176	362V0	624C04	2000	P16R				65.00	65,763.10
U 624185	372N0	624C12	2000	P16R				5.00	5,058.70
Total								100.00	101,174.00

Save Copy Position Distribution to Job Update Budget

[Position Detail](#)
[List By Employee](#) | [List By Position](#) | [Summary Totals](#)

CURRENT SECTION DETAILS THE EXISTING POSITION RECORD LABOR DISTRIBUTION

PROPOSED SECTION DETAILS THE PROPOSED POSITION RECORD LABOR DISTRIBUTION
 THE **INDEX FIELD** CAN BE UPDATED WITH NEW OR DIFFERENT VALUE
 THE **ACCOUNT FIELD** CAN BE UPDATED WITH NEW OR DIFFERENT VALUE BUT SHOULD FOLLOW ACCOUNT CODE DEFINITION RULES
 THE **PERCENT FIELD** IS THE PERCENT OF ALLOCATION TO THIS INDEX; MULTIPLE LABOR DISTRIBUTION INDICES **MUST** TOTAL 100%
 THE **AMOUNT FIELD** CAN BE UPDATED WITH POSITION BUDGET AMOUNT (**NOTE: SYSTEM WILL AUTOMATICALLY ROUND TO THE NEAREST DOLLAR**)
 THE **X BUTTON** WILL DELETE THIS LINE OF LABOR DISTRIBUTION

CURRENT INCUMBENT SECTION DETAILS THE PROPOSED JOB RECORD LABOR DISTRIBUTION

BUTTONS
ADD NEW RECORD BUTTON -- WILL ADD ADDITIONAL LABOR DISTRIBUTION LINES
SAVE BUTTON -- THIS BUTTON WILL SAVE ANY CHANGES TO LABOR DISTRIBUTIONS ADDITONS, CHANGES, OR MODIFICATIONS
COPY POSITION DISTRIBUTION TO JOB -- WILL COPY POSITION RECORD LABOR DISTRIBUTION STRATEGY TO JOB RECORD LABOR DISTRIBUTION (**NOTE: COPY TRANSACTION WILL ERROR IF ACCOUNT CODE 2005 IS USED IN THE POSITION LABOR DISTRIBUTION**)
UPDATE BUDGET -- WILL UPDATE THE POSITION BUDGET ON THE LIST BY POSITION SCREEN TO MATCH THE MODIFIED **TOTAL BUDGET IN THE PROPOSED SECTION**

Search Go

Position Comments

Position and Title: FY0246 Associate Professor

Last Updated by: Yolanda W. Chaves Aguilar

Last Updated on: Apr 01, 2015

Comments:

THIS SCREEN IS TO BE USED TO ENTER SPECIFIC DETAILS AND JUSTIFICATIONS RELATED TO POSITION CHANGES, FTE CHANGES, CARRER LADDERS, AND ANY OTHER RELEVANT INFORMATION RELATED TO THE DEVELOPMENT OF THE POSITION BUDGET



Save Reset



BUTTONS
SAVE -- THIS BUTTON WILL SAVE ANY COMMENTS
RESET -- THIS BUTTON WILL RESET VALUES TO ORIGINAL

[List By Position](#) | [Position Detail](#)

Salary Planner

Create Scenario

Create a new salary planner scenario from a salary planner extract.

Copy Scenario

Copy a salary planner scenario to another salary planner scenario.

Edit Scenario

Update salary planner scenario information.

Organization Lock

Lock or unlock salary planner organization locks.

Query Multiple Extracts

View multiple salary planner scenarios by organization.

Salary Planner Reports Menu

View Salary Planner reports

Budget Planner Menu

Update or review Budget Development phase information, Manage phase organization locks, or view Budget Development reports.

Click on the "SALARY PLANNER Reports Menu" link

Search Go



Salary Planner Reports Menu

Salary Planner Working Report

Reports Salary Planner information by index within organization.

Salary Planner Exception Report

Reports Salary Planner updates that do not adhere to salary increase rules.

Vacant Position Report

Reports vacant positions by organization.

Salary Planner Position Working Report

Reports Salary Planner Position information by index within organization.



Click on the "Salary Planner Working Report" link

Salary Planner Working Report

NOTE: "Chart of Accounts" should always be "U"

Chart of Accounts

**"Budget ID" should be BUD"FY"
"FY" = Proposed fiscal year**

Budget ID Budget

Click "Continue" to set-up report parameters.

Salary Planner Working Report

This report can be queried by "Org" "Index" and "Fund"

Chart of Accounts Budget ID

Scenario Include Suborgs Include Employee ID View By

Paper Size Include Vacant Position

LEGAL

Click "Submit" to get the report.



UNIVERSITY OF NEW MEXICO
 SALARY PLANNER WORKING REPORT for FY 2015-2016
 Organization: 730B6 - HR Finance Tech & Business Svcs ; Include Vacant Positions: Y
 Index: - ; Fund: -

EXAMPLE

Account	Employee Name	Position, Suffix, Title	Hiring Org	Performance Rating	Posn Budget	Index	Current Labor Distribution			Proposed Labor Distribution						
							%	Amount	FTE	Index	%	Amount	FTE	Change Amt	Change %	
2020																
	Garcia,Elizabeth	(100023886) S03745-00 Analyst/Programmer 3	730B6	E	58,000	730021	100.00%	58,000	1.00	730021	100.00%	58,000	1.00	0	0.00%	
							100.00%	\$58,000			100.00%	\$58,000				
	Haney,Michael	(100049429) S01247-00 Mgr,Information Services	730B6		77,095	730021	85.00%	85,531		730021	85.00%	85,531				
						738001	15.00%	11,564	1.00	738001	15.00%	11,564	1.00	0	0.00%	
							100.00%	\$77,095			100.00%	\$77,095				
	Lopez,Alex	(103048568) S07851-00 Accountant 3	730B6		58,000	730020	50.00%	29,000		730020	50.00%	29,000				
						730021	50.00%	29,000	1.00	730021	50.00%	29,000	1.00	0	0.00%	
							100.00%	\$58,000			100.00%	\$58,000				
	Mathias,James	(100037814) S01314-00 Analyst/Programmer 3	730B6	M	58,000	730020	80.00%	34,135		730020	80.00%	34,135				
						730021	40.00%	22,757	1.00	730021	40.00%	22,757	1.00	0	0.00%	
							100.00%	\$56,892			100.00%	\$56,892				
	* Pooled Position	415DST *415M Distribution	730B1			730001	100.00%	0			0.00%	0		0	0.00%	
							100.00%	\$0			0.00%	\$0		0	0.00%	
	Thomas,David	(103829281) S04884-01 Analyst/Programmer 2	730B6	E	48,023	730030	100.00%	48,023	1.00	730030	100.00%	48,023	1.00	0	0.00%	
							100.00%	\$48,023			100.00%	\$48,023				
	Vacant Position	S00189 Accountant 2	730B6		0	730018	50.00%	0		730018	50.00%	0		0	0.00%	
						730021	50.00%	0	0.00	730021	50.00%	0	0.00	0	0.00%	
							100.00%	\$0			100.00%	\$0		0	0.00%	
Subtotal Account Code 2020:					\$299,118			\$298,010	5.00			\$298,010	5.00	0	0.00%	
2040																
	Sanford,Logan	(101278330) S01153-00 User Support Analyst 2	730B6	M	33,280	730021	100.00%	33,280	1.00	730021	100.00%	33,280	1.00	0	0.00%	
							100.00%	\$33,280			100.00%	\$33,280				
Subtotal Account Code 2040:					\$39,790			\$33,280	1.00			\$33,280	1.00	0	0.00%	
2060																
	Thomas,David	(100015098) S04887-00 Sr Fiscal Services Tech	730B6		43,191	730021	100.00%	43,191	1.00	730021	100.00%	43,191	1.00	0	0.00%	
							100.00%	\$43,191			100.00%	\$43,191				
Subtotal Account Code 2060:					\$43,191			\$43,191	1.00			\$43,191	1.00	0	0.00%	
20A0																
	Vacant Position	GB0140 Project Assistant	730B6			730021	100.00%	8,700			0.00%	0		(8,700)	(100.00%)	
							100.00%	\$8,700			0.00%	\$0		(8,700)	(100.00%)	
Subtotal Account Code 20A0:								\$8,700				\$0		(8,700)	(100.00%)	
20J0																
	Pooled Position	UB0514 University Student Bi-weekly	730B6			730021	100.00%	0			0.00%	0		0	0.00%	
							100.00%	\$0			0.00%	\$0		0	0.00%	
Subtotal Account Code 20J0:								\$0				\$0		0	0.00%	
20L0																
	Pooled Position	UF0818 *University Student Wkstdy Fe	730B6			730021	100.00%	0			0.00%	0		0	0.00%	
							100.00%	\$0			0.00%	\$0		0	0.00%	
Subtotal Account Code 20L0:								\$0				\$0		0	0.00%	
20N0																
	Pooled Position	US0514 University Student Wkstdy Stat	730B6			730021	30.00%	0			0.00%	0		0	0.00%	
							30.00%	\$0			0.00%	\$0		0	0.00%	
	Pooled Position	US0750 University Student Wkstdy Stat	730B6			730021	100.00%	9,534			0.00%	0		(9,534)	(100.00%)	
							100.00%	\$9,534			0.00%	\$0		(9,534)	(100.00%)	
Subtotal Account Code 20N0:								\$9,534				\$0		(9,534)	(100.00%)	

Search Go



Salary Planner Reports Menu

Salary Planner Working Report

Reports Salary Planner information by index within organization.

Salary Planner Exception Report

Reports Salary Planner updates that do not adhere to salary increase rules

Vacant Position Report

Reports vacant positions by organization.

Salary Planner Position Working Report

Reports Salary Planner Position information by index within organization.

Click on the “Salary Planner Exception Report” link

Salary Planner Exception Report

Chart of Accounts

Budget ID

Salary Planner Exception Report

Chart of Accounts **Budget ID**

Scenario

Include Suborgs

Increase Range % **to** %

Cut Off Date (DD-MON-YYYY)

Organization



UNIVERSITY OF NEW MEXICO
 SALARY PLANNER EXCEPTION REPORT for FY 2015–2016
 Organization: 730B Human Resources Department
 Range Entered: 1% to 10%; Actual Range: 0% to 0%; Cut Off Date: 01-APR- 2015

EXAMPLE

Organization: 730B1 HR Dept Administration Unlocked

Employee Name	Position, Suffix, Title	Current Salary	Proposed Salary	% Increase	Rule Broken	Action Required
Branan, Patricia Comments:	(101) (10000) S0 (10000) Admin Assistant 2	\$31,012.80	\$31,012.80	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Buran, Michael Comments:	(101) (10000) S0 (10000) Chief HR Operations Officer	\$124,800.00	\$124,800.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Coronado, Helen Comments:	(100) (10000) S0 (10000) Vice President, Human Resources	\$193,808.04	\$193,808.04	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Franklin, Kelly Comments:	(101) (10000) S0 (10000) HR Administrator 2	\$49,000.08	\$49,000.08	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
McCarthy, Joyce Comments:	(100) (10000) S0 (10000) Program Operations Director	\$90,000.00	\$90,000.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Parsons, Gabriel Comments:	(100) (10000) S0 (10000) Operations Manager	\$60,000.00	\$60,000.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Sanchez, Ellen Comments:	(100) (10000) S0 (10000) Executive Assistant	\$49,351.93	\$49,351.93	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Stiles, Raymond Comments:	(101) (10000) S0 (10000) HR Projects Specialist	\$55,000.00	\$55,000.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
High Table Magistrate Comments:	(100) (10000) S0 (10000) Employee Relations Director	\$91,835.55	\$91,835.55	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.



Salary Planner Reports Menu

Salary Planner Working Report

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Vacant Position Report

Reports vacant positions by organization.

Salary Planner Position Working Report

Reports Salary Planner Position information by index within organization.

Click on the “Vacant Position Report” link

Vacant Position Report



UNIVERSITY OF NEW MEXICO
 VACANT POSITION REPORT for FY 2015-2016
 Organization: 730B Human Resources Department

EXAMPLE

Organization	Position	Scenario	Position Budget
730B1 HR Dept Administration	S00000 HR Tech	REG STAFF 13	\$32,157
	S00002 Admin Assistant 2	REG STAFF 13	\$28,080
	S00004 Public Information Rep	REG STAFF 13	\$17,000
	S00005 HR Tech	REG STAFF 13	\$35,360
730B6 HR Finance Tech & Business Svcs	GB0000 Project Assistant	POOLED POSITIONS 13	\$8,700



Salary Planner Reports Menu

Salary Planner Working Report

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Salary Planner Exception Report

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Vacant Position Report

Reports vacant positions by organization.

Salary Planner Position Working Report

Reports Salary Planner Position information by index within organization.

Click on the "Salary Planner Position Working Report" link

Salary Planner Position Working Report

Chart of Accounts

Budget ID

Salary Planner Position Working Report

Chart of Accounts **Budget ID**

Scenario ALL Yes No



UNIVERSITY OF NEW MEXICO
 SALARY PLANNER POSITION WORKING REPORT for FY 2015–2016
 Organization: 730B - Human Resources Department
 Index: - ; Fund: -

EXAMPLE

Position, Suffix, Title	Hiring Org	Posn Budget	Current Labor Distribution				Proposed Labor Distribution				Change Amt	Change %	
			Index	%	Amount	FTE	Account	Index	%	Amount			FTE
S00189 Accountant 2	730B6	0	730018	50.00%	0		2020	730018	50.00%	0			
			730021	50.00%	0		2020	730021	50.00%	0			
				100.00%	\$0	0.00				100.00%	\$0	0.00	\$0
S00318 HR Tech,Sr	730B4	42,377	730002	100.00%	42,377		2060	730002	100.00%	42,377			
				100.00%	\$42,377	1.00				100.00%	\$42,377	1.00	\$0
S00493 HR Services Rep	730B5	26,186	730003	100.00%	26,186		2060	730003	100.00%	26,186			
				100.00%	\$26,186	1.00				100.00%	\$26,186	1.00	\$0
S00643 Human Resources Consultant	730B3	50,000	738001	100.00%	50,000		2020	738001	100.00%	50,000			
				100.00%	\$50,000	1.00				100.00%	\$50,000	1.00	\$0
S00644 HR Technical Service Rep	730B5	33,800	730003	100.00%	33,800		2060	730003	100.00%	33,800			
				100.00%	\$33,800	1.00				100.00%	\$33,800	1.00	\$0
S00772 Operations Manager	730B1	64,933	730001	50.00%	32,467		2020	730001	50.00%	32,467			
			730030	50.00%	32,467		2020	730030	50.00%	32,466			
				100.00%	\$64,933	1.00				100.00%	\$64,933	1.00	\$0
S00818 HR Consulting Grp Mgr	730B3	69,197	730005	100.00%	69,197		2020	730005	100.00%	69,197			
				100.00%	\$69,197	1.00				100.00%	\$69,197	1.00	\$0
S00944 HR Tech	730B3	31,699	730005	100.00%	31,699		2060	730005	100.00%	31,699			
				100.00%	\$31,699	1.00				100.00%	\$31,699	1.00	\$0
S01041 Executive Assistant	730B1	49,352	730001	100.00%	49,352		2020	730001	100.00%	49,352			
				100.00%	\$49,352	1.00				100.00%	\$49,352	1.00	\$0
S01153 User Support Analyst 2	730B6	39,790	730021	100.00%	39,790		2040	730021	100.00%	39,790			
				100.00%	\$39,790	1.00				100.00%	\$39,790	1.00	\$0
S01247 Mgr,Information Services	730B6	77,095	730021	85.00%	65,531		2020	730021	85.00%	65,531			
			738001	15.00%	11,564		2020	738001	15.00%	11,564			
				100.00%	\$77,095	1.00				100.00%	\$77,095	1.00	\$0
S01304 Human Resources Consultant	730B3	46,450	730005	100.00%	46,450		2020	730005	100.00%	46,450			
				100.00%	\$46,450	1.00				100.00%	\$46,450	1.00	\$0
S01314 Analyst/Programmer 3	730B6	58,000	730020	60.00%	34,800		2020	730020	60.00%	34,800			
			730021	40.00%	23,200		2020	730021	40.00%	23,200			
				100.00%	\$58,000	1.00				100.00%	\$58,000	1.00	\$0
S01419 Human Resources Consultant	730B3	46,450	730005	100.00%	46,450		2020	730005	100.00%	46,450			
				100.00%	\$46,450	1.00				100.00%	\$46,450	1.00	\$0

BUDGET DEVELOPMENT

Budget Development

Business Rules

- All indices with Current Unrestricted funds must be budgeted.
No budget equals no spending!
- NSF (Non-sufficient Funds) checking is functional at Org Level 5 and Fund Level 3 for the following Unrestricted Funds:
 - Instruction & General (I&G)
 - Research
 - Public Service, including Non-Endowed Spending
 - Athletics
- Banner will apply NSF to the following document types:
 - Direct Pay Invoices (DP-EZs)
 - Journal Vouchers
 - LoboMart Requisitions

Budget Development

Business Rules cont...

- Budget reserves using 1901 account code
 - 1900 or 1903 account codes are limited to actuals only
 - Not every VP unit allows budgeting of reserves during the budget build process; contact your VP unit before budgeting reserves
 - If revenues will be received and not spent during the fiscal year being budgeted, a negative 1901 budget entry may be made (regardless of whether there is an actual 1900 reserves) in the amount that will not be spent

Budget Development

Business Rules cont...

- Allocations and Transfers must zero-out
 - Budget both sides (TO and FROM)
 - If monies are going to another department, make sure the receiving department budgets their side for the exact amount
 - Allocations (16xx) must zero by account code
 - Enter account code comments to explain where the allocation/transfer is going to or coming from
- Index budgets must net to zero: Budgeted Revenues minus Budgeted Expenses must equal zero
- Budget all sources of revenue and corresponding expenditures

Budget Development

Business Rules cont...

- ***Avoid negative expense budgets!***
 - Exception: 20SA for salary clearing indices
- **20SA Salary Adjustments**
 - Used to budget for labor costs not applied to specific positions in Salary Planner
 - Also used to offset salaries on salary clearing indices
 - Must add account code comments in budget worksheet
 - Prior to spending, this budget should be moved to the appropriate expenditure account code; no actual entries allowed on account code
- **80Eo Contingency – Undesignated expense budget**
 - Prior to spending, this budget should be moved to the appropriate expenditure account code; no actual entries allowed on account code

Budget Development

Business Rules cont...

- Account code restrictions:
 - 0220 – Course lab fees
 - 02Z0 – Other student fees
 - 02Z1 – Used only for MANDATORY student fees
 - 02Z2 – ASUNM Student Fees
 - 02Z3 – GPSA Student Fees
 - 0610 – Internal service revenue - Used only with indices tied to P18X program codes
 - 0720 – State appropriations
 - 1601 – F&A Revenue Allocation - Used only by OVPRD to budget and move actuals for F&A allocations
 - 1602 – F&A Distribution - Used only by OVPRD to budget and move actuals for F&A quarterly returns to units
 - 1640 – Pooled revenue allocations – Used only for I&G pooled revenue allocation
 - 1661 – F&A Revenue reallocation - Used only in program code P161
 - 1662 – Extended University allocations

[Student](#)
[Financial Aid](#)
[Employee](#)
[Payment](#)
[Finance](#)

Search



Finance Menu

Operating Ledger Queries
 Review revenue and expense information by account or organization.

Encumbrance Query
 Review encumbrance information by account.

Approve Documents
 Approve or disapprove financial documents.

View Document
 Review requisitions, purchase orders, invoices, journal vouchers, encumbrances.

Journal Voucher Entry
 Initiate a journal voucher of budget and/or actual activity.

Budget Planner Menu
 Update or review Budget Development phase information, Manage phase scenario information.

Fund Balance Categorization

Budget Planner Menu

Create Budget Development Query
 Review Budget Development phase information.

Create Budget Worksheet
 Update Budget Development phase information.

Create Projected Actuals Worksheet
 Create financial projections through current fiscal year.

Maintain Organization Lock
 Lock or unlock Budget Development phase or organization.

Budget Development Reports Menu
 View Budget Development reports.

Projected Actuals Reports Menu
 View Projected Actuals reports.

Salary Planner Menu

Create Budget Worksheet

i To create a new worksheet, select Create Query. To open a worksheet, select Retrieve Query.

Create a New Worksheet Query

Create Query

Retrieve Existing Worksheet Query
Saved Query

None

Retrieve Query

Create Budget Worksheet

i Select columns to display amounts captured at the time the budget was built from the Operating or Position

- Adopted Budget
- Permanent Budget Adjustments
- Temporary Adopted
- Temporary Adjustments

← **Check "Adopted Budget"**

Note: "Permanent Budget Adjustments will show you your budget revisions but will not be included in the worksheet calculation"

Continue

Create Budget Worksheet

i Chart, Budget ID, Phase, Fund, and Organization are required. Program and Account may use wildcard (%). For Activity and Location, you can use a wildcard or a specific value. Budget matches null in budget lines, or a specific value may be used. Choose Budget Duration (or All), source for Financial Manager (or All), and Budget types to include in the worksheet.

Chart of Accounts	U	Budget Phase	ADOPTD	Budget	Enter: Chart of Accounts: U Budget ID BUDxx Budget Phase: ADOPTD Account Index: Index or use the lookup feature
Budget ID	BUDxx	Program	P131		
Account Index	031031	Activity	031B07		
Fund	2U0224	Location			
Organization	031B				
Display Fin Mgr from:	None				

Using the Lookup Feature

Chart of Accounts

Budget ID

Account Index

Fund

Organization

Validation Code Lookup

Chart of Accounts U

Account Index Criteria 031031

Title Criteria

Fund Criteria

Organization Criteria

Maximum rows to return 100

Execute Query

Exit without Value

Code lookup results

Title	Account Index	Fund	Organization	Account	Program	Activity	Location
President Office Community Affairs	031031	2U0224	031B		P131	031B07	

Exit without Value

Another Query

Create Budget Worksheet

 Chart, Budget ID, Phase, Fund, and Organization are required. Program and Account may use wildcard (%). For Activity and matches null in budget lines, or a specific value may be used. Choose Budget Duration (or All), source for Financial Manager types to include in the worksheet.

<input type="button" value="Chart of Accounts"/>	<input type="text" value="U"/>		
Budget ID	<input type="text" value="BUDxx"/>	Budget Phase	<input type="text" value="ADOPTD"/> <input type="button" value="Budget"/>
<input type="button" value="Account Index"/>	<input type="text" value="031031"/>	Program	<input type="text" value="P131"/>
Fund	<input type="text" value="2U0224"/>	Activity	<input type="text" value="031B07"/>
Organization	<input type="text" value="031B"/>	Location	<input type="text"/>

Enter:
Chart of Accounts: U
Budget ID: BUDxx
Budget Phase: ADOPTD
Account Index: Index or use the lookup feature

Display Fin Mgr from:

Check to Include:

<input checked="" type="checkbox"/>	Revenue Accounts
<input checked="" type="checkbox"/>	Labor Accounts
<input checked="" type="checkbox"/>	Expenses
<input checked="" type="checkbox"/>	Deleted Items

Save Query as:

Shared



Here is the top of the worksheet

Verify that the FOPA are correct

[Student](#)
[Financial Aid](#)
[Employee](#)
[Payment](#)
[Finance](#)

Search

[RETURN TO BUDGET DEVELOPMENT MENU](#)

i The Budget Development Worksheet allows you to calculate changes to all (mass change) or individual line items, and to delete lines to your budget. You must select the Post button to save your changes. Select the Jump To Bottom link to navigate to the worksheet area for access to additional features and totals.

Worksheet Parameters

Budget Worksheet

Chart of Accounts U	University of New Mexico	Duration	All		
Budget Id	BUDxx	2016 Budget ID	Budget Phase	ADOPTD	2016 Adopted Phase
Account Index	031031	President Office Community Affairs	Fund Type	02	CU Main
Fund	2U0224	MU I & G	Program	P131	Institutional Support
Organization	031B	Presidents Office Gen Admin	Activity	031B07	United Way
Account	All		Location		

Financial Manager

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Percent

Program Account Type/Code	Title	Adopted Budget	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
5T	Institutional Support Intra University Activities									
	1640 Allocations Pooled Allocation Gen	136,919.00	136,919.00	P	136,919.00	<input type="text"/>	<input type="checkbox"/>	0.00	136,919.00	<input type="checkbox"/>
	1667 Instruction and General - Recoup	0.00	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	1901 Budgeted Balance Change	0.00	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
61	Operating Expense Labor									
	2020 Administrative Professional Gen	0.00	0.00	P	86,461.00	<input type="text"/>	<input type="checkbox"/>	86,461.00	86,461.00	<input type="checkbox"/>
62	Operating Expense Fringe									
	2140 Retirement Gen	0.00	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
71	Operating Expense Other									
	3100 Office Supplies General	1,152.00	1,152.00	P	1,152.00	<input type="text"/>	<input type="checkbox"/>	0.00	1,152.00	<input type="checkbox"/>
	3110 Books Periodicals Gen	1,000.00	1,000.00	P	1,000.00	<input type="text"/>	<input type="checkbox"/>	0.00	1,000.00	<input type="checkbox"/>
	3130 Media Supplies Gen	0.00	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	3140 Computer Software Gen	40.00	40.00	P	40.00	<input type="text"/>	<input type="checkbox"/>	0.00	40.00	<input type="checkbox"/>
	3150 Computer Supplies < \$1,000	100.00	100.00	P	100.00	<input type="text"/>	<input type="checkbox"/>	0.00	100.00	<input type="checkbox"/>

Note: that you cannot enter a change value on a labor code. Labor is keyed in Salary Planner



Percent



A calculate button is located at the top and bottom of the worksheet

Calculate will show you the effect of your changes Post will save your changes

Code	Title	Adopted Budget	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
	Institutional Support									
	Intra University Activities									
1640	Allocations Pooled Allocation Gen	136,919.00	136,919.00	P	136,919.00	-500	<input type="checkbox"/>	0.00	136,919.00	<input type="checkbox"/>
1667	Instruction and General - Recoup	0.00	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
1901	Budgeted Balance Change	0.00	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	Operating Expense Labor									
2020	Administrative Professional Gen	0.00	0.00	P	86,461.00			86,461.00	86,461.00	
	Operating Expense Fringe									
2140	Retirement Gen	0.00	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	Operating Expense Other									
3100	Office Supplies General	1,152.00	1,152.00	P	1,152.00	-250	<input type="checkbox"/>	0.00	1,152.00	<input type="checkbox"/>
3110	Books Periodicals Gen	1,000.00	1,000.00	P	1,000.00	-250	<input type="checkbox"/>	0.00	1,000.00	<input type="checkbox"/>
3130	Media Supplies Gen	0.00	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
3140	Computer Software Gen	40.00	40.00	P	40.00		<input type="checkbox"/>	0.00	40.00	<input type="checkbox"/>
3150	Computer Supplies	150.00	150.00	P	150.00		<input type="checkbox"/>	0.00	150.00	<input type="checkbox"/>

Change values are entered in whole dollars

This is the updated worksheet after calculating

Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
	136,919.00	<input type="text"/>	<input type="checkbox"/>	(500.00)	136,419.00	<input type="checkbox"/>
	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	86,461.00			86,461.00	86,461.00	
	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	1,152.00	<input type="text"/>	<input type="checkbox"/>	(250.00)	902.00	<input type="checkbox"/>
	1,000.00	<input type="text"/>	<input type="checkbox"/>	(250.00)	750.00	<input type="checkbox"/>
	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	40.00	<input type="text"/>	<input type="checkbox"/>	0.00	40.00	<input type="checkbox"/>
	150.00	<input type="text"/>	<input type="checkbox"/>	0.00	150.00	<input type="checkbox"/>

“Post” to save changes

Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
9.00 P	136,419.00		<input type="checkbox"/>	(500.00)	136,419.00	<input type="checkbox"/>
0.00 P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
0.00 P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
0.00 P	86,461.00			86,461.00	86,461.00	
0.00 P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
2.00 P	902.00		<input type="checkbox"/>	(250.00)	902.00	<input type="checkbox"/>

After posting, the proposed budget is updated and becomes a link that you can click on to see the change history

Budget Development History

Report Parameters

Budget Development History					
Chart of Accounts	U	University of New Mexico	Duration Code	P	
Budget Id	BUDxx	2016 Budget ID	Budget Phase	ADOPTD	2016 Adopted Phase
Fund	2U0224	MU I & G	Program	P131	Institutional Support
Organization	980B	Regents General Admin	Activity	GNACTV	General Activity
Account	1640	Allocations Pooled Allocation Gen	Location		

Query Results

User Id	Date	Time	Prior Proposed Budget	Change Amount	New Proposed Budget	Deleted
		10:56 am	136,919.00	(500.00)	136,419.00	N

New Row	Account	Account	Proposed Budget
1	Account1	3189	2500
2	Account2		
3	Account3		
4	Account4		
5	Account5		

Account codes may be added here at the bottom of the worksheet by typing in the account code or by hitting the Account button to use the account code lookup feature.

Worksheet

Status	Text	Index Code	Program	Account Type/Code	Title
		454046	P2E704		ME QSI Regents Special Cp
				52	Nonoperating Revenues
OPAL	N			10C0	Interest Income Gen
				5T	Intra University Activities
OPAL	N			1100	Trsfr To I G Gen
OPAL	N			11E0	Trsfr To Public Service Gen
OPAL	N			12P0	Unitized Trsfr From Endowments Gen
OPAL	N			12P1	Not Unitized Trsfr Frm Endwmnts Gen
OPAL	N			1660	Allocations Other Gen
				71	Operating Expense Other
OPAL	N			8060	Other Operating Costs Gen
OPAL	N			80E0	Contingency Budget Gen

Account code comments are required for transfers (11XX, 12XX), allocations (16XX), 80E0 and 20SA

Click on the account code to enter a comment

Comments can also be entered for the index

Budget Development Text

Enter Budget Text, Print:

\$50,000 to 688033-11N0 Speakers Program

Enter Budget Text, No Print:

Save 

[[Exit budget text page](#)]

After all changes have been entered and posted, check Summary Totals at the bottom of the worksheet to make sure the index is in balance.

Summary Totals

Account Type	Account Type Title	Base Budget	Proposed Budget	New Budget	Cumulative Change
52	Nonoperating Revenues	0.00	0.00	0.00	0.00
5T	Intra University Activities	200,000.00	200,000.00	200,000.00	0.00
	50 Revenues and Intra Univ Activities	200,000.00	200,000.00	200,000.00	0.00
71	Operating Expense Other	200,000.00	200,000.00	200,000.00	0.00
	70 Other Expense	200,000.00	200,000.00	200,000.00	0.00
	Net	0.00	0.00	0.00	0.00

Budget Planner Menu

Create Budget Development Query

Review Budget Development phase information by account or organization.

Create Budget Worksheet

Update Budget Development phase information via a budget worksheet.

Create Projected Actuals Worksheet

Create financial projections through current fiscal year end via a projected actuals worksheet.

Maintain Organization Lock

Lock or unlock Budget Development phase organization locks.

Budget Development Reports Menu

View Budget Development reports.

Projected Actuals Reports Menu

View Projected Actuals reports.

Salary Planner Menu

View Position Budgets, Salary and Labor Budgets for the current year.



Budget Planner Reports

Home

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Announcement: Welcome

Home / Main Menu Log out

Budget Development Reports Menu

- Budget Development Working Report - Budget Year**
Reports new year budget development and salary planner information in detail or summary by organization and/or index.
- Operating Budget Summary Report**
Reports income statement summary information by account type.
- Index Out-of-Balance Exception Report**
Reports indices within locked organizations where revenues less expenses does not net to zero.
- Organization Summary Report**
Reports income statement summary information by organization.
- Budgeted Account Code Report**
Reports budgeted indices by organization for a specific account.
- Budgeted Transfers/Allocations Report**
Reports budgeted summary by account for transfer and allocation accounts only.
- Budgeted Account Code Totals Report**
Reports all Account Codes budgeted with summary totals by Account Type.
- Budgeted Index/Account Comments Report**
Reports budgeted Index code comments with subordinate Account code comments.
- Budgeted Indices Not Modified Report**
Reports budgeted Index codes that have not been modified.

Verify Data

- Run Reports
 - Indices Not Modified
 - Budgeted Account Code Report for account code 1640 and Fund 2U0224. Account total should match your I&G allocation.
 - Salary Planner Working Report
 - Salary Planner Position Working Report
 - Budget Development Working Report
 - Index Out of Balance Report – indices must be in balance.

Approval

Locked = Approved
Unlocked = Unapproved

- Who should lock Organizations?
 - Level 1 & 2 Organizations – OPBA (Office of Planning, Budget & Analysis) locks Budget Development; Human Resources locks Salary Planner
 - Level 3 Organizations – VP unit representative
 - Level 4 & 5 below – College/School/Branch representative
 - Level 6 and below – the Department Head/Chair/Director or authorized representative
- For Salary Planner, Organization Lock is a link on the Salary Planner menu – Must lock/unlock each scenario separately
- For Budget Development, Maintain Organization Lock is a link on the Budget Planner Menu

Document Routing

- Justification letters for out-of-range salary increases to:
 - Faculty Contracts & Services Office
 - Human Resources
- Faculty Contract Memo form to Faculty Contracts & Services Office for:
 - NEW faculty
 - Visiting faculty
 - Research faculty
 - Changes to faculty appointment

Print Final Reports

- Salary Planner Working Report
- Budget Development Working Report

Printed Reports are for your use and do not need to be routed to the core offices.

Resources

Websites:

Main Campus Budget Office (OPBA)

www.unm.edu/~budget

Learning Central

<https://learningcentral.health.unm.edu/plateau/user/login.jsp>

Fiscal Agent Networking Group

http://www.unm.edu/~fiscal/agent_list.html

Human Resources Division

<http://hr.unm.edu/>

Contacts

VP Unit Representatives

President/Academic and Student Affairs

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Administration

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END