

Salary Planner & Budget Planner

# New User Presentation

# 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.  
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.  
**The University of New Mexico LoboWeb**  
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

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

UNM Logo

MyUNM

my **UNM**

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

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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.



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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)

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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

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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

Summary Totals

List By Position

### 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"/>

[Jump to Bottom](#)

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 1<sup>st</sup> or August 1<sup>st</sup> (Faculty) as their Base Salary in NBAJOBS.

#### 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						
<a href="#">100000000</a>	<a href="#">FY0160 - 00 Research Assoc Professor</a>	38.30	29,490.96	38.30	38.30	29,490.93	.00	.00	29,490.93	Changed	No
<a href="#">101340000</a>	<a href="#">FY1015 - 00 Research Assoc Professor</a>	87.50	93,730.00	87.50	87.50	93,730.00	.00	.00	93,730.00	Changed	No
<a href="#">100020000</a>	<a href="#">FY0965 - 00 Research Assoc Professor</a>	100.00	55,000.00	100.00	64.00	55,000.00	.00	.00	35,200.00	Changed	No
<b>Total:</b>						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
	<a href="#">023A - SOE Mechanical Engineering</a>	178,220.93	.00	.00	158,420.93
<b>Total:</b>		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
<a href="#">023A - SOE Mechanical Engineering</a>	178,220.93	.00	.00	158,420.93
<b>Total:</b>	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

Save Reset

**Don't forget to hit SAVE!**

**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](#)

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

[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	<a href="#">Job Detail</a> <a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Position Detail</a>	<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

Save   Next

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

**Don't forget to hit SAVE!**

**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

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

### 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 type="text" value="100.00"/>	100.00	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](#)

Employee Payment Finance

Search  Go

RETURN TO MENU SITE MAP HELP

# 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
<b>Total</b>											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
<b>Total</b>											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
<b>Total</b>											100.00	159,370.00

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

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

RELEASE: 7.3.1.1

**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 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)  
**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 Apply

**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
<a href="#">FY0160 Research Assoc Professor</a>	100.00	100.00	1	.383	68,251.00	12.82	8,749.00	77,000.00		29,490.93	<a href="#">Distribution Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
<a href="#">FY0965 Research Asst Professor</a>	100.00	100.00	1	.64	55,000.00	.00	.00	55,000.00		35,200.00	<a href="#">Distribution Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
<a href="#">FY1015 Research Assoc Professor</a>	100.00	100.00	.95	.875	98,800.00	8.42	8,320.00	107,120.00		93,730.00	<a href="#">Distribution Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
<a href="#">FY1017 Research Professor</a>	100.00	100.00	.19	0	22,230.00	-100.00	-22,229.00	1.00		.00	<a href="#">Distribution Comments*</a> <a href="#">Employee</a>		<input type="checkbox"/>
<a href="#">FY1101 Research Professor</a>	100.00	100.00	1	0	144,000.00	-100.00	-144,000.00	.00		.00	<a href="#">Distribution Comments*</a> <a href="#">Employee</a>		<input type="checkbox"/>
<b>Total:</b>			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
<a href="#">023A - SOE Mechanical Engineering</a>			4.14	1.90	388,281.00	-38.42	-149,160.00	239,121.00
<b>Total:</b>			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

Save Reset

Copy Estimated Budget to Budget

Download Position Data

Download Position and Distribution

#### 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
<b>Total</b>								<b>100.00</b>	<b>101,174.00</b>

### 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
<b>Total</b>								<b>100.00</b>	<b>101,174.00</b>	

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
<b>Total</b>								<b>100.00</b>	<b>101,174.00</b>

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. Chason 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](#)

Search  Go

# 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



## 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



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 %	
<b>2020</b>																
	Garcia,Elizabeth	(100023186) 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		738001	15.00%	11,564				
							100.00%	\$77,095	1.00		100.00%	\$77,095	1.00	0	0.00%	
	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		730021	50.00%	29,000				
							100.00%	\$58,000	1.00		100.00%	\$58,000	1.00	0	0.00%	
	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		730021	40.00%	22,757				
							100.00%	\$56,892	1.00		100.00%	\$56,892	1.00	0	0.00%	
	* 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		0	0.00%	
	Vacant Position	S00189 Accountant 2	730B6		0	730018	50.00%	0		730018	50.00%	0				
						730021	50.00%	0		730021	50.00%	0				
							100.00%	\$0	0.00		100.00%	\$0	0.00	0	0.00%	
<b>Subtotal Account Code 2020:</b>					<b>\$299,118</b>			<b>\$298,010</b>	<b>5.00</b>			<b>\$298,010</b>	<b>5.00</b>	<b>0</b>	<b>0.00%</b>	
<b>2040</b>																
	Sanford,Logan	(101278330) S01153-00 User Support Analyst 2	730B6	M	33,790	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		0	0.00%	
<b>Subtotal Account Code 2040:</b>					<b>\$39,790</b>			<b>\$33,280</b>	<b>1.00</b>			<b>\$33,280</b>	<b>1.00</b>	<b>0</b>	<b>0.00%</b>	
<b>2060</b>																
	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		0	0.00%	
<b>Subtotal Account Code 2060:</b>					<b>\$43,191</b>			<b>\$43,191</b>	<b>1.00</b>			<b>\$43,191</b>	<b>1.00</b>	<b>0</b>	<b>0.00%</b>	
<b>20A0</b>																
	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%)	
<b>Subtotal Account Code 20A0:</b>								<b>\$8,700</b>				<b>\$0</b>		<b>(8,700)</b>	<b>(100.00%)</b>	
<b>20J0</b>																
	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%	
<b>Subtotal Account Code 20J0:</b>								<b>\$0</b>				<b>\$0</b>		<b>0</b>	<b>0.00%</b>	
<b>20L0</b>																
	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%	
<b>Subtotal Account Code 20L0:</b>								<b>\$0</b>				<b>\$0</b>		<b>0</b>	<b>0.00%</b>	
<b>20N0</b>																
	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%)	
<b>Subtotal Account Code 20N0:</b>								<b>\$9,534</b>				<b>\$0</b>		<b>(9,534)</b>	<b>(100.00%)</b>	

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
Brewer, 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.
Burns, 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.
Carroll, 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.
Criffin, 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

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 "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

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 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  **Include Suborgs** Yes

**List Changes Only** 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

[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	<b>Enter:</b> <b>Chart of Accounts:</b> U <b>Budget ID</b> BUDxx <b>Budget Phase:</b> ADOPTD <b>Account Index:</b> Index or use the lookup feature
<b>Budget ID</b>	BUDxx	<b>Program</b>	P131		
Account Index	031031	<b>Activity</b>	031B07		
<b>Fund</b>	2U0224	<b>Location</b>			
<b>Organization</b>	031B				
<b>Display Fin Mgr from:</b>	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"/>		
<b>Budget ID</b>	<input type="text" value="BUDxx"/>	<b>Budget Phase</b>	<input type="text" value="ADOPTD"/> <input type="button" value="Budget"/>
<input type="button" value="Account Index"/>	<input type="text" value="031031"/>	<b>Program</b>	<input type="text" value="P131"/>
<b>Fund</b>	<input type="text" value="2U0224"/>	<b>Activity</b>	<input type="text" value="031B07"/>
<b>Organization</b>	<input type="text" value="031B"/>	<b>Location</b>	<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

[Jump To Bottom](#)

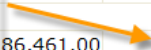
[Return to Index Page](#)

Percent

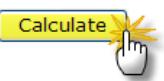
Calculate

Program	Account Type/Code	Title	Adopted Budget	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		Institutional Support									
5T		Intra University Activities									
	<a href="#">1640</a>	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"/>
	<a href="#">1667</a>	Instruction and General - Recoup	0.00	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	<a href="#">1901</a>	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									
	<a href="#">2020</a>	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									
	<a href="#">2140</a>	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									
	<a href="#">3100</a>	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"/>
	<a href="#">3110</a>	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"/>
	<a href="#">3130</a>	Media Supplies Gen	0.00	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
	<a href="#">3140</a>	Computer Software Gen	40.00	40.00	P	40.00	<input type="text"/>	<input type="checkbox"/>	0.00	40.00	<input type="checkbox"/>
	<a href="#">3150</a>	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	<a href="#">136,419.00</a>		<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	<a href="#">902.00</a>		<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
		<a href="#">454046</a>	P2E704		ME QSI Regents Special Cp
				52	Nonoperating Revenues
OPAL	N			<a href="#">10C0</a>	Interest Income Gen
				5T	Intra University Activities
OPAL	N			<a href="#">1100</a>	Trsfr To I G Gen
OPAL	N			<a href="#">11E0</a>	Trsfr To Public Service Gen
OPAL	N			<a href="#">12P0</a>	Unitized Trsfr From Endowments Gen
OPAL	N			<a href="#">12P1</a>	Not Unitized Trsfr Frm Endwmnts Gen
OPAL	N			<a href="#">1660</a>	Allocations Other Gen
				71	Operating Expense Other
OPAL	N			<a href="#">8060</a>	Other Operating Costs Gen
OPAL	N			<a href="#">80E0</a>	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

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**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
	<b>50 Revenues and Intra Univ Activities</b>	<b>200,000.00</b>	<b>200,000.00</b>	<b>200,000.00</b>	<b>0.00</b>
71	Operating Expense Other	200,000.00	200,000.00	200,000.00	0.00
	<b>70 Other Expense</b>	<b>200,000.00</b>	<b>200,000.00</b>	<b>200,000.00</b>	<b>0.00</b>
	<b>Net</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

## Budget Planner Menu

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### 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 p

### 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

Update Position Budgets, Summary and Labor Budgets for the

## Budget Development Reports Menu

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### Budget Development Working Report - Budget Year

Reports new year budget development and salary planner information in detail.

### 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

### 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 comment

### Budgeted Indices Not Modified Report

Reports budgeted Index codes that have not been modified

END