Salary Planner & Budget Planner

New User Presentation

SALARY PLANNER

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**

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Dropdown list:
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

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Employee [...] ance

Search [...] Go

RETURN TO SALARY PLANNER MENU   SITE MAP   HELP

Edit Sc[...]

Choose [...] Scenario, then select filter criteria.

Scenario Se[...]

Extract ID: 12FAC09
Scenario: 12 MO FACULTY 09

Filter Criteria
By Position Attributes: ●
By Employee Name: ○

Select

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

THERE ARE NINE (9) SCENARIOS FOR DEPARMENTS 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

UNM FastInfo   Find help about: [_____]   within: ● Student ○ Faculty/Staff   Search

Edit Scenar[...]

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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.

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

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase			Yes

[Mass Apply]

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".

Jump to Bottom

023A SOE Mechanical Engineering, Locked, Updateable

ID and Name	Position, Suffix and Title	Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded from Totals
100000000	FY0160 - 00 Research Assoc Professor	38.30	29,490.96	38.30	38.30	29,490.93	.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		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

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

Records 1 - 3 of 3

[Save] [Reset]

[Download Job Data]   [Download Job and Distribution]

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

Return to Top

List By Position | Summary Totals
Employee Filter | Position Filter

UNM FastInfo   Find help about: [_____]   within: ● Student ○ Faculty/Staff   [Search]

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[Edit Scenario]

RELEASE: 8.2

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List By Employee Cont.

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

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]

[Download Job Data]   [Download Job and Distribution]

You can double check all employee salaries by down-loading the spreadsheet with or without labor.

Return to Top

List By Position | Summary Totals
Employee Filter | Position Filter

UNM FastInfo   Find help about: [_____] Within: ● Student ○ Faculty/Staff [Search]

Edit Scenario

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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**

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Employee Life Tab

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Search [____] Go

RETURN TO MENU   SITE MAP   HELP

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:			
Appointment Percent: ✱	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 0
Budget Factor:	100.00		
Estimated Fiscal Year Budget:	159,369.45		
Exclude from Totals:	☐		

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!

[Save] [Reset] [Next]

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.

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

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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	

[Add New Record]

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

[Save] [Copy Position Distribution to Job] [Copy Job Distribution to Position]

Employee Detail | Job Detail
List By Employee | List By Position | Summary Totals

UNM FastInfo   Find help about: [   ] within: ● Student ○ Faculty/Staff [Search]

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Callout text (right side):

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 POSITON BUDGET RECORD LABOR DISTRIBUTION

Callout text (bottom right):

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.

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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 Bottom

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 Budget	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 Employee		☐
FY0965 Research Asst Professor	100.00	100.00	1	.64	55,000.00	.00	.00	55,000.00		35,200.00	Distribution Comments Employee		☐
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 Employee		☐
FY1017 Research Professor	100.00	100.00	.19	0	22,230.00	-100.00	-22,229.00	1.00		.00	Distribution Comments* Employee		☐
FY1101 Research Professor	100.00	100.00	1	0	144,000.00	-100.00	-144,000.00	.00		.00	Distribution Comments* Employee		☐
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 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 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
.

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List By Employee | Summary Totals
Employee Filter | Position Filter

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[Edit Scenario]

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Position Detail

Mass Changes

Percent: [____]

Amount: [6,681.00]

[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: ✱	1	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:	☐	

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

UNM FastInfo Find help about: [____] within: ⦿ Student ○ Faculty/Staff [Search]

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Employee Life Tab

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Search [_____] Go

RETURN TO MENU   SITE MAP   HELP

Position Labor Distribution

ℹ️ 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	GNACTV					30.00	30,352.00
U	624176	362V0	624C04	2000	P16R	GNACTV					65.00	65,762.00
U	624185	372N0	624C12	2000	P16R	GNACTV					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	GNACTV					30.00	30,352.00	X
U	624176	362V0	624C04	2000	P16R	GNACTV					65.00	65,762.00	X
U	624185	372N0	624C12	2000	P16R	GNACTV					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	GNACTV					30.00	30,352.20
U	624176	362V0	624C04	2000	P16R	GNACTV					65.00	65,763.10
U	624185	372N0	624C12	2000	P16R	GNACTV					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

UNM FastInfo   Find help about: [_____]   within: ● Student ● Faculty/Staff [Search]

RELEASE: 7.3.1.1

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**

Employee **Payment** **Finance**

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RETURN TO SALARY PLANNER MENU   SITE MAP   HELP

The University of New Mexico
LoboWeb

Salary Planner Reports Menu

Salary Planner Working Report
Reports Salary Planner information by index within organization.

Click on the "**Salary Planner Working Report**" link

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.

UNM FastInfo **Find help about:** [_____] within: ⦿ **Student** ◯ **Faculty/Staff** [Search]

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EXIT

Salary Planner Working Report

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

Chart of Accounts	U	Budget ID	BUDxx

| Scenario | ALL | Include Suborgs | Yes | Include Employee ID | Yes | View By | Account |

Organization [ ]

| List Changes Only | No | Paper Size | ⦿ LETTER | Include Vacant Position | Yes |
| | | | ◯ LEGAL | | |

Account Index [ ]

Fund [ ]

Submit   Click "Submit" to get the report.

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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: -

Account	Employee Name		Position, Suffix, Title	Hiring Org	Performance Rating	Posn Budget	Current Labor Distribution				Proposed Labor Distribution				Change Amt	Change %
							Index	%	Amount	FTE	Index	%	Amount	FTE		
2020	Garcia,Elizabeth	(100023105)	S03745-00 Analyst/Programmer 3	730B6	E	58,000	730021	100.00%	58,000		730021	100.00%	58,000			
								100.00%	$58,000	1.00		100.00%	$58,000	1.00	0	0.00%
	Hurley,Michele	(100049429)	S01247-00 Mgr,Information Services	730B6		77,095	730021	85.00%	65,531		730021	85.00%	65,531			
							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	(100048588)	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%
	Matthews,Aaron	(100037814)	S01314-00 Analyst/Programmer 3	730B6	M	58,000	730020	60.00%	34,135		730020	60.00%	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			
								100.00%	$0			0.00%	$0		0	0.00%
	Brown,Daniel	(100829291)	S04904-01 Analyst/Programmer 2	730B6	E	48,023	730030	100.00%	48,023		730030	100.00%	48,023			
								100.00%	$48,023	1.00		100.00%	$48,023	1.00	0	0.00%
	Vacant Position		S00169 Accountant 2	730B6		0	730016	50.00%	0		730016	50.00%	0			
							730021	50.00%	0		730021	50.00%	0			
								100.00%	$0	0.00		100.00%	$0	0.00	0	0.00%
Subtotal Account Code 2020:						$299,118			$298,010	5.00			$298,010	5.00	0	0.00%
2040	Sandoval,Logan	(101278330)	S01153-00 User Support Analyst 2	730B6	M	39,790	730021	100.00%	33,280		730021	100.00%	33,280			
								100.00%	$33,280	1.00		100.00%	$33,280	1.00	0	0.00%
Subtotal Account Code 2040:						$39,790			$33,280	1.00			$33,280	1.00	0	0.00%
2060	Thornton,Diana	(100015098)	S04897-00 Sr Fiscal Services Tech	730B6		43,191	730021	100.00%	43,191		730021	100.00%	43,191			
								100.00%	$43,191	1.00		100.00%	$43,191	1.00	0	0.00%
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			
								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			
								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			
								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			
								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			
								100.00%	$9,534			0.00%	$0		(9,534)	(100.00%)
Subtotal Account Code 20N0:									$9,534				$0		(9,534)	(100.00%)

16-MAR-12 03:34 PM

Page 1 of 1

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Salary Planner Exception Report

Chart of Accounts	U

Budget ID	BUDxx [Budget]

[Continue]

Salary Planner Exception Report

Chart of Accounts	U	**Budget ID**	BUDxx			
Scenario	ALL		**Include Suborgs**	Yes	**Increase Range**	1 % to 10 %

Cut Off Date	01-APR-2015	(DD-MON-YYYY)

[Organization] 730B

[Submit]

EXAMPLE

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

Organization: 730B1   HR Dept Administration   Unlocked

Employee Name		Position, Suffix, Title	Current Salary	Proposed Salary	% Increase	Rule Broken	Action Required
Branson Patricia	(101 ████)	S0████ Admin Assistant 2	$31,012.80	$31,012.80	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Ewer Michael	(101████)	S0████ Chief HR Operations Officer	$124,800.00	$124,800.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Gonzales Helen	(100████)	S0████ Vice President,Human Resources	$193,808.04	$193,808.04	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Knafler Kaley	(101████)	S04████ HR Administrator 2	$49,000.08	$49,000.08	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
McCarthy Joyce	(100████)	S04████ Program Operations Director	$90,000.00	$90,000.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Pacheco Gabriel	(100████)	S0████ Operations Manager	$60,000.00	$60,000.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Sanchez Eileen	(100████)	S0████ Executive Assistant	$49,351.93	$49,351.93	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Sykes Raymond	(101████)	S0████ HR Projects Specialist	$55,000.00	$55,000.00	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							
Vigil Rubie Magdalena	████	S0████ Employee Relations Director	$91,835.55	$91,835.55	0.00%	OUT OF RANGE	Submit justification for increase out of range to VP.
Comments:							

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Vacant Position Report

Chart of Accounts	U

Budget ID	BUDxx	Budget
Organization	730B	**Include Suborgs** Yes ▾

Submit

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**	S0▓▓▓	HR Tech	REG STAFF 13	$32,157
		S0▓▓▓	Admin Assistant 2	REG STAFF 13	$28,080
		S0▓▓▓	Public Information Rep	REG STAFF 13	$17,000
		S0▓▓▓	HR Tech	REG STAFF 13	$35,360
730B6	**HR Finance Tech & Business Svcs**	GB▓▓▓	Project Assistant	POOLED POSITIONS 13	$8,700

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EXAMPLE

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

Position, Suffix, Title	Hiring Org	Posn Budget	Current Labor Distribution				Account	Proposed Labor Distribution				Change Amt	Change %
			Index	%	Amount	FTE		Index	%	Amount	FTE		
S00169 Accountant 2	730B6	0	730016	50.00%	0		2020	730016	50.00%	0			
			730021	50.00%	0		2020	730021	50.00%	0			
				100.00%	$0	0.00			100.00%	$0	0.00	$0	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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	0.00%
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

Create Budget Worksheet

ℹ️ Chart, Budget ID, Phase, Fund, and Organization are required. Program and Account may use wildcard (%). For Activity and L 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.

Chart of Accounts	U

Budget ID	BUDxx
Account Index	031031
Fund	2U0224
Organization	031B

Budget Phase	ADOPTD	Budget
Program	P131	
Activity	031B07	
Location		

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

Display Fin Mgr from:	None ▾

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Using the Lookup Feature

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

Chart of Accounts
Budget ID
Account Index
Fund
Organization

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.

Chart of Accounts	U

Budget ID	BUDxx	**Budget Phase**	ADOPTD	Budget
Account Index	031031	**Program**	P131	
Fund	2U0224	**Activity**	031B07	
Organization	031B	**Location**		

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

Display Fin Mgr from: None ▾

Check to Include:
- ☑ Revenue Accounts
- ☑ Labor Accounts
- ☑ Expenses
- ☑ Deleted Items

Save Query as: [   ]

☐ **Shared**

Submit

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Here is the top of the worksheet
Verify that the FOPA are correct

Student | Financial Aid | Employee | Payment | **Finance**

Search [   ] [Go]   **RETURN TO BUDGET DEVELOPMENT MENU**

The Budget Development Worksheet allows you to calculate changes to all (mass change) or individual line items, and to delete li[nes], lines to your budget. You must select the Post button to save your changes. Select the Jump To Bottom link to navigate to the b[ottom] 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
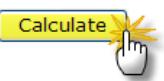
50

☐ **Percent** [Calculate]

ram 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									
1640	Allocations Pooled Allocation Gen	136,919.00	136,919.00	P	136,919.00		☐	0.00	136,919.00	☐
1667	Instruction and General - Recoup	0.00	0.00	P	0.00		☐	0.00	0.00	☐
1901	Budgeted Balance Change	0.00	0.00	P	0.00		☐	0.00	0.00	☐
61	Operating Expense Labor									
2020	Administrative Professional Gen	0.00	0.00	P	86,461.00			86,461.00	86,461.00	
62	Operating Expense Fringe									
2140	Retirement Gen	0.00	0.00	P	0.00		☐	0.00	0.00	☐
71	Operating Expense Other									
3100	Office Supplies General	1,152.00	1,152.00	P	1,152.00		☐	0.00	1,152.00	☐
3110	Books Periodicals Gen	1,000.00	1,000.00	P	1,000.00		☐	0.00	1,000.00	☐
3130	Media Supplies Gen	0.00	0.00	P	0.00		☐	0.00	0.00	☐
3140	Computer Software Gen	40.00	40.00	P	40.00		☐	0.00	40.00	☐

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

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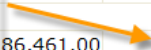
Percent	Calculate	A calculate button is located at the top and bottom of the worksheet		Calculate will show you the effect of your changes Post will save your changes				

t ode	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	☐	0.00	136,919.00	☐
1667	Instruction and General - Recoup	0.00	0.00	P	0.00		☐	0.00	0.00	☐
1901	Budgeted Balance Change	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	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		☐	0.00	0.00	☐
	Operating Expense Other									
3100	Office Supplies General	1,152.00	1,152.00	P	1,152.00	-250	☐	0.00	1,152.00	☐
3110	Books Periodicals Gen	1,000.00	1,000.00	P	1,000.00	-250	☐	0.00	1,000.00	☐
3130	Media Supplies Gen	0.00	0.00	P	0.00		☐	0.00	0.00	☐
3140	Computer Software Gen	40.00	40.00	P	40.00		☐	0.00	40.00	☐
3150		150.0	150.00	P	150.0		☐		.00	

Change values are entered in whole dollars

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This is the updated worksheet after calculating

uration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
	136,919.00		☐	(500.00)	136,419.00	☐
	0.00		☐	0.00	0.00	☐
	0.00		☐	0.00	0.00	☐
	86,461.00			86,461.00	86,461.00	
	0.00		☐	0.00	0.00	☐
	1,152.00		☐	(250.00)	902.00	☐
	1,000.00		☐	(250.00)	750.00	☐
	0.00		☐	0.00	0.00	☐
	40.00		☐	0.00	40.00	☐
	150.00		☐	0.00	150.00	☐

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"Post" to save changes

	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
9.00	P	136,419.00		☐	(500.00)	136,419.00	☐
0.00	P	0.0		☐	0.00	0.00	☐
0.00	P	0.00		☐	0.00	0.00	☐
0.00	P	86,461.00			86,461.00	86,461.00	
0.00	P	0.00		☐	0.00	0.00	☐
2.00	P	902.00		☐	(250.00)	902.00	☐

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

Close Window

New Row		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.

Requery	Calculate	Post

Download All Worksheet Columns	Download Selected Worksheet Columns

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
				7I	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]

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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**

The University of New Mexico

LoboWeb

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 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
U... Position Bud... ...b ...ary an... Labor ...tio... for the...

The University of New Mexico

LoboWeb

Budget Development Reports Menu

Budget Development Working Report - Budget Year
Reports new year bugdet 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 commen

Budgeted Indices Not Modified Report
Reports budgeted Index codes that have not been modified

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END