Budget and Salary Planner

Navigation and How-To

Prepared by: Office of Planning, Budget, and Analysis (OPBA)

Budget Planner General Information

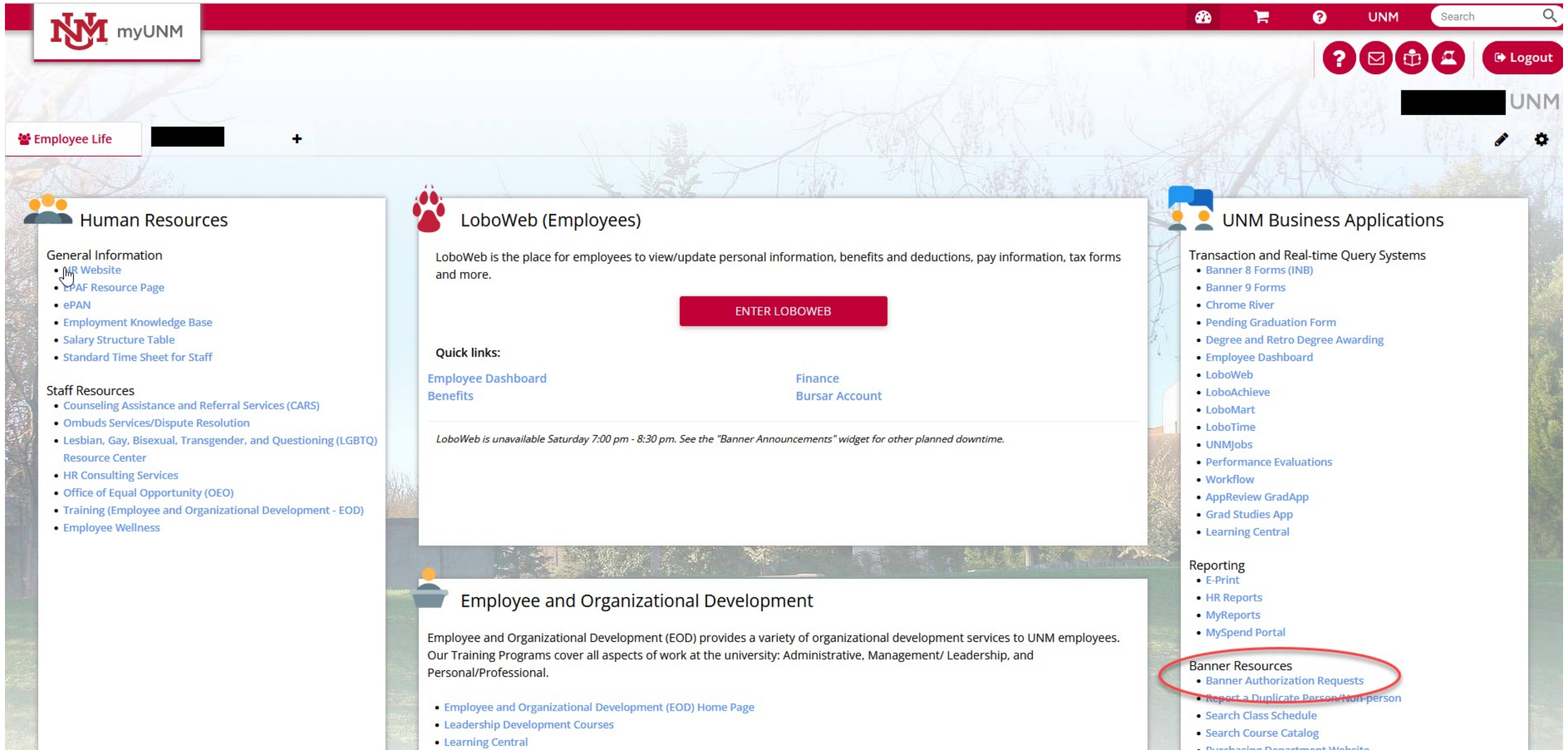
- After reading through this presentation, you will be ready to take the proficiency exam in Learning Central (BUDG 103-Budget Planner Exam)
- After achieving a passing score of 85%, you may request your Banner Authorization Role(s)
  - Request the following roles through Banner Authorization Requests at my.unm.edu:
    - Department Salary Planner
    - Department Budget Developer
    - Department General Inquiry (if you already are a Banner Finance user, you have this role.
  - Request the correct level of organization code access required for your area
    - College level = Level 3 Org (request this level of your org hierarchy if you oversee a level 3 Org)
    - Department level = Level 5 Org (request this level if you oversee a level 5 or lower-level org)
    - If you are unsure of what level to request, contact your fiscal agent

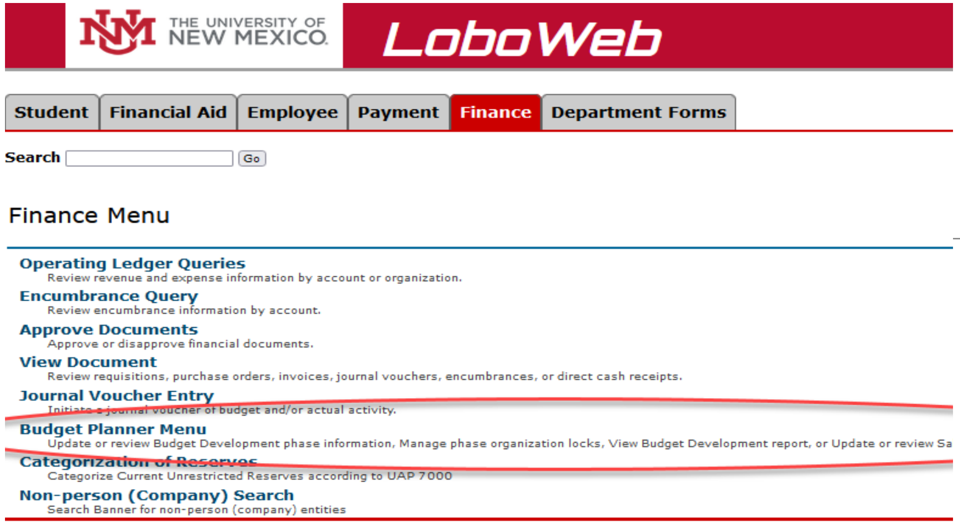
Budget Planner General Information – Banner Authorization Request

In your Loboweb,

under Banner Resources,

click on “Banner Authorization Requests”





Salary Planner

Salary Planner is accessed through LoboWeb – Finance tab – Budget Planner Menu.

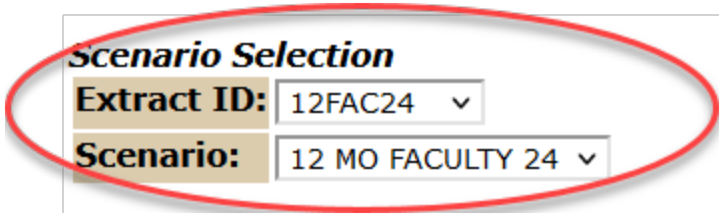
Once your BAR role is approved you will see these options in your finance tab. If you do not see these options, check the status of your BAR request.

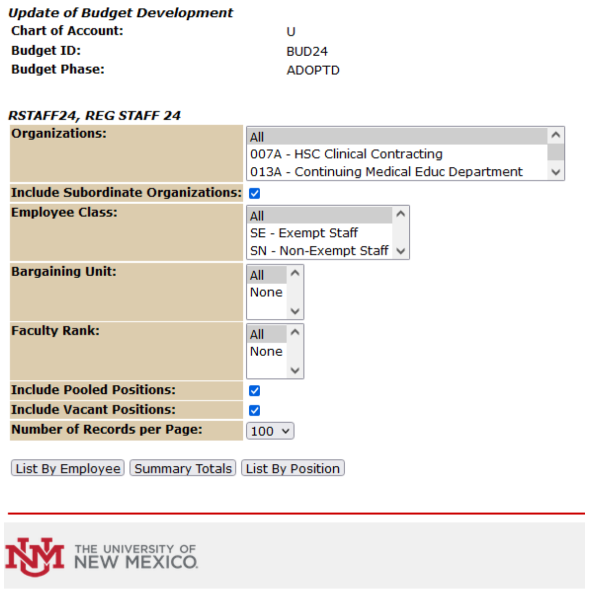
Salary Planner Scenarios

EXTRACT ID	SCENARIO	DEFINITION
12FACXX	12 MO FACULTY XX	12 Month Contract Faculty
9FACXX	9 MO FACULTY XX	9 Month Contract Faculty
CSTAFFXX	CONTRACT STAFF XX	Staff who are contract employees
CWAXX	CWA BARG UNIT XX	Staff in the CWA bargaining unit
HSTAFFXX	HOUSESTAFF XX	Resident Physicians
POLICEXX	POLICE BARG UNIT XX	Staff in the Police Bargaining Unit
POOLXX	POOLED	Non-Regular Staff such as On Call, Students, Temp services, & Part time faculty
RSTAFFXX	REG STAFF XX	Exempt & Non-Exempt Staff not in a bargaining unit
USUNMXX	USUNM BARG UNIT XX	Staff in the USUNM Bargaining Unit

*XX will reflect the current fiscal year that is open (example RSTAFF25, etc.)

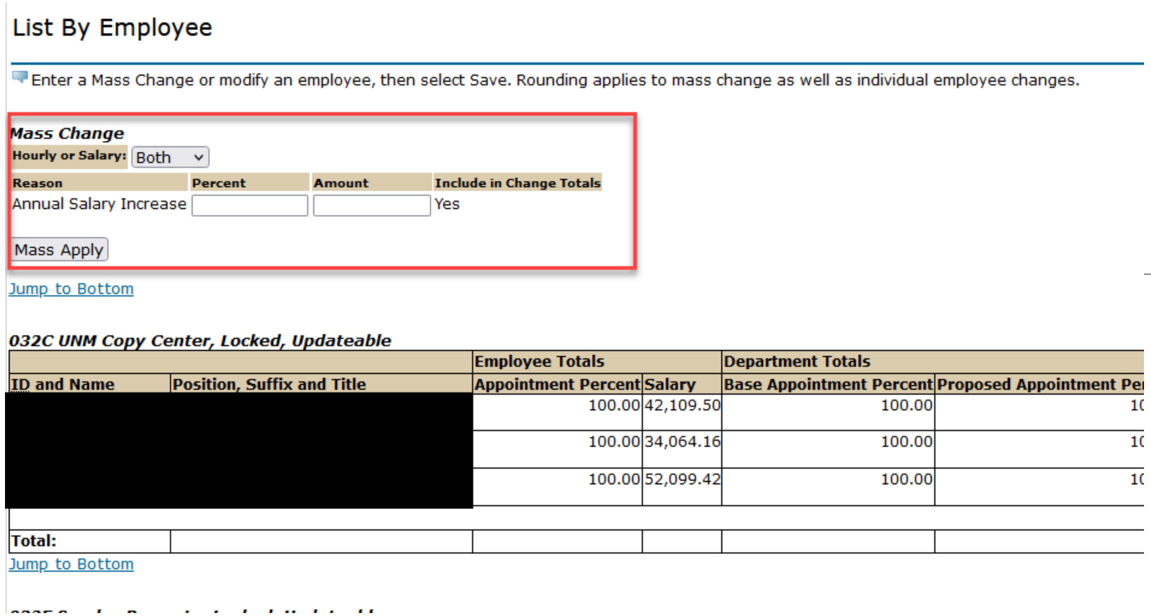
Salary Planner Scenarios & Org Choices





- Choose the employee population(Extract ID) to be edited. Be sure to choose the scenario for the upcoming fiscal year
- Only Organization codes that the user has access to will appear in the list
- Click on the down arrow to select the organization code to be edited during the current session OR select “All”
- Include subordinate organizations: Check the box to display subordinate organizations or uncheck to display only the selected organization
- Click the button “List by Employee” to display a screen listing of all employees who are associated with the chosen org code and employee class or classes displayed in the scenario
- Increases to a job salary should be applied first on the job side (List by Employee) then on position side (List by Position).

Salary Planner – List by Employee


List By Employee

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

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase			Yes

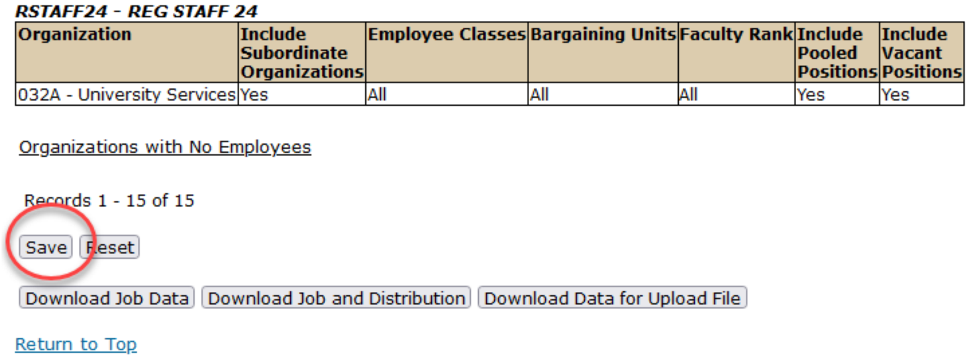
Mass Apply

Jump to Bottom

032C UNM Copy Center, Locked, Updateable

		Employee Totals		Department Totals	
ID and Name	Position, Suffix and Title	Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Pe
[redacted]		100.00	42,109.50	100.00	10
		100.00	34,064.16	100.00	10
		100.00	52,099.42	100.00	10
Total:					

Jump to Bottom


RSTAFF24 - REG STAFF 24

Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
032A - University Services	Yes	All	All	All	Yes	Yes

Organizations with No Employees

Records 1 - 15 of 15

Save Reset

Download Job Data | Download Job and Distribution | Download Data for Upload File

Return to Top

- Used to “Mass Apply” an increase (either percentage or amount) to every employee record in the list OR apply increases individually
  - To apply a 3% increase to every employee record in the list, input the number 3 under the heading “Mass Change”, “Annual Salary Increase”, in the percent box then click on the “Mass Apply” button
  - SAVE all changes before navigating to another page by clicking on the “SAVE” button at the bottom of the page
  - Navigate around the page by scrolling OR by clicking on the “Jump to Bottom” or “Return to Top”.
- Click on the link under ID and Name to go the employee detail page

Salary Planner – Labor Distribution

	Links
,909.61	Job Detail Distribution Comments Position Detail
,909.61	

From the “Employee Detail” page, there are links available to view “Job Detail”, “Distribution”, “Comments”, or “Position Detail”

Employee
Name and ID: [redacted]
Home Organization: 032M - Chem & Resrch Lab Supplier (CRLS)
* - indicates a required field.

Job Detail for Position and Suffix S03175 - 00

	Proposed	Base	Current
Model:			
Effective Date:	[redacted]		
Title:			
Hourly Rate:	34.572593	32.615651	34.572593
Annual Salary:	71,909.61	67,839.25	71,909.61
Total Change Percent:	6.00		
Total Change Amount:	4,070.36		
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		
Salary Group:	2024		
Table:	SE		
Grade:	14		
Step:	0		
Budget Factor:	100.00		
Estimated Fiscal Year Budget:	71,909.61		

The only change that can be made on this page is "Appointment Percent"

Base Job
Begin Date: Jun 03, 2019
End Date:
Job Status: Active
Salary Type: Salary
Rank:
Tenure Status:
EPAF Transaction #: [redacted]

Save Reset Previous

Job Detail Page

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: [redacted]
EPAF Transaction #:

Make Necessary changes to the way a job salary is paid on this page. Update in the Proposed area the new index if needed and update any changes to account code as well as "add a new record", if a new record is applied you will need to specify the percent split between 2 or more indices. Make sure to click on save as well as "Copy Job Distribution to Position"

Current

COA	Index	Fund	Organization	Account	Program	Activity
U	032053	2U0224	032M	2020	P141	GNACTV

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Del
U	032053	2U0224	032M	2020	P141	GNACTV				100.00	71,909.61	X
									Total	100.00	71,909.61	

Add New Record

Proposed Position Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	032053	2U0224	032M	2020	P141	GNACTV				100.00	71,910.00
									Total	100.00	71,910.00

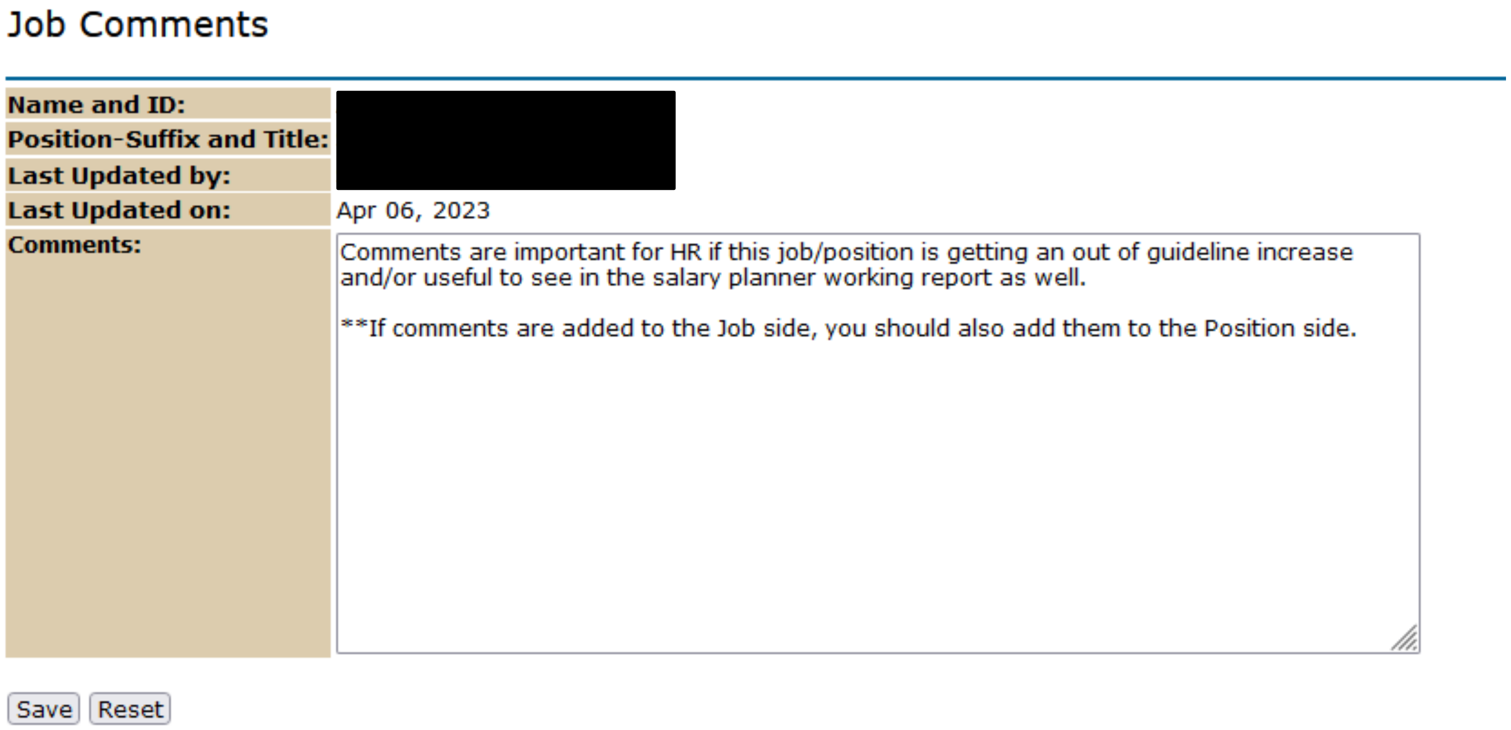
Save | Copy Position Distribution to Job | Copy Job Distribution to Position

Salary Planner Comments

Make sure to save any comments that are necessary for HR use and for Admin tracking.

You have 2 areas for comments:

- Job Side (In List by Employee)
- Position side (In List by Position)


Job Comments

Name and ID:	[redacted]
Position-Suffix and Title:	
Last Updated by:	
Last Updated on:	Apr 06, 2023
Comments:	Comments are important for HR if this job/position is getting an out of guideline increase and/or useful to see in the salary planner working report as well. **If comments are added to the Job side, you should also add them to the Position side.

Save Reset

Salary Planner – List by Position

In this area you will be able to update the FTE for the position and the Proposed Budget line for any vacancies you have. The "Proposed Salary" Column should* match the "Proposed Budget" only rounded. No cents on proposed budget nor change amounts.

The links available in this area are like the "List By Employee" links, however this area "List by Position" will be what is going to link up in your Budget Planner worksheet.

*Examples of when Position Budget should be different from Proposed Salary

- Budgeting Vacancies
- Budgeting for incentive payments not part of contract salary
- Budgeting for career ladder or reclassification that will not be effective until later in the fiscal year
- When employee is leaving your department or UNM later in the fiscal year and it is determined that the position will not be replaced immediately
- Dollars that will not be used for the position can be budgeted elsewhere

Any Changes on this page should be saved immediately to avoid any technical issues. Save is at the bottom of the page

032B - Records Management, 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	Proposed Salary	Links	E
[redacted]	100.00	100.00	1	1	33,933.00	.00	.00	33,933.00		.00	Distribution Comments Employee	
	100.00	100.00	0	0	.0		.00	.00		.00	Distribution Comments Employee	
Total:			1.00	1.00	33,933.00	.00	.00	33,933.00		.00		

Budgeted Vacancy

Jump to Bottom

032C - UNM Copy Center, Locked, Updateable

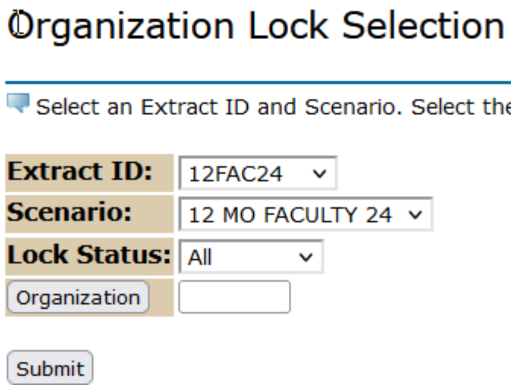
Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Proposed Salary	Links	E
[redacted]	100.00	100.00	1	1	33,100.00	2.91	964.00	34,064.00		34,064.16	Distribution Comments Employee	
	100.00	100.00	1	0	28,558.00	-100.00	-28,558.00	.00		.00	Distribution Comments Employee	
	100.00	100.00	1	1	64,160.00	-14.28	-9,160.00	55,000.00		.00	Distribution Comments*	

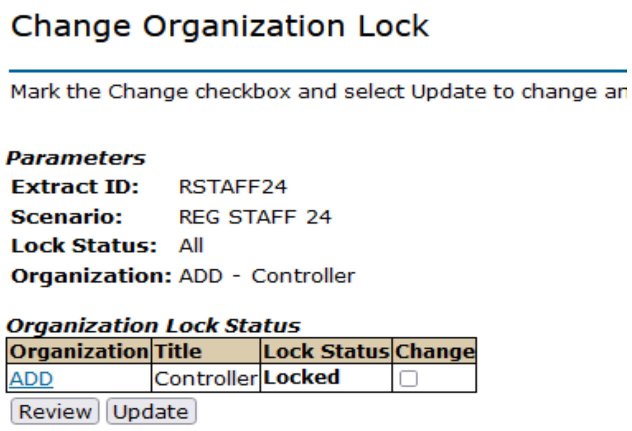
Salary Planner – Org Locking

In Salary planner, each scenario must be locked separately.

Go to Salary Planner menu and click on “Organization Lock” Select correct Extract ID and input your highest-level organization code. Click on Submit.

Change Organization Lock – Check Mark the Change box option to either Lock or Unlock the Org Code specified. Then click on Update.



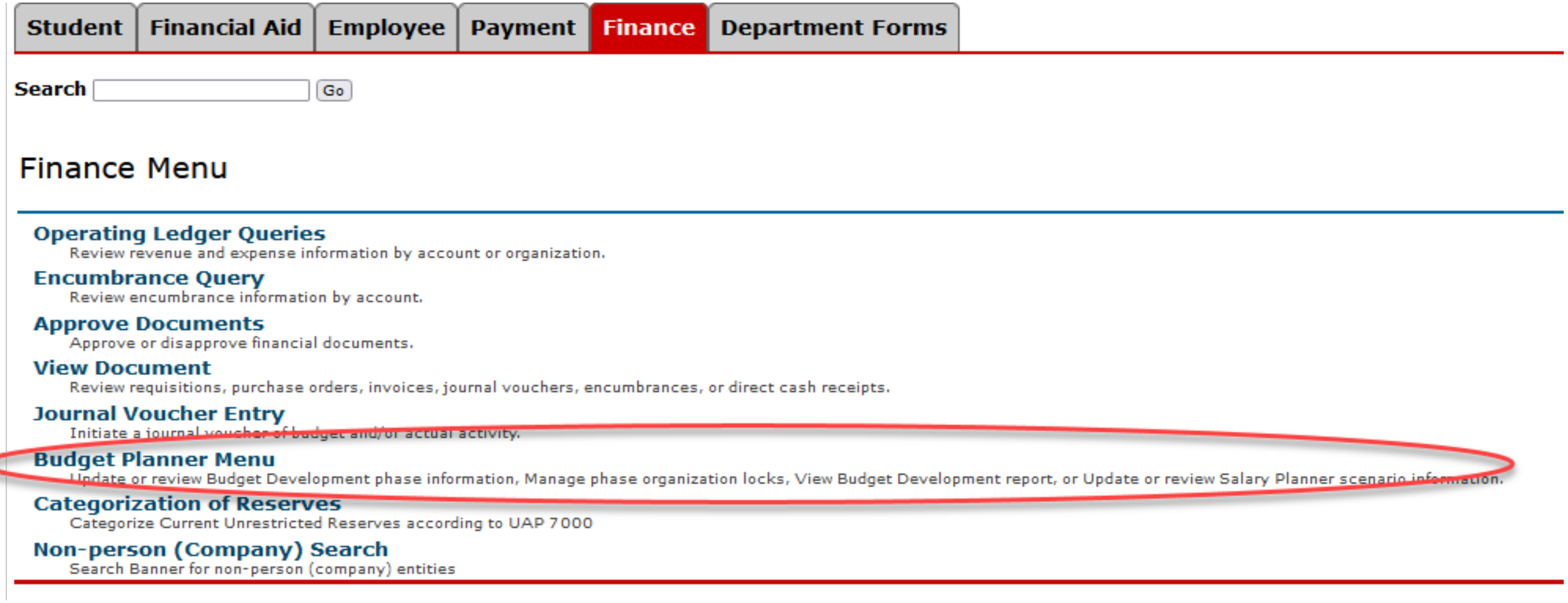


UNM Budget Planner

- In this area you will have the ability to create/update your index budget for the upcoming fiscal year.
- The information from your budget worksheet will be what is uploaded into Banner as the Original budget for the new fiscal year.

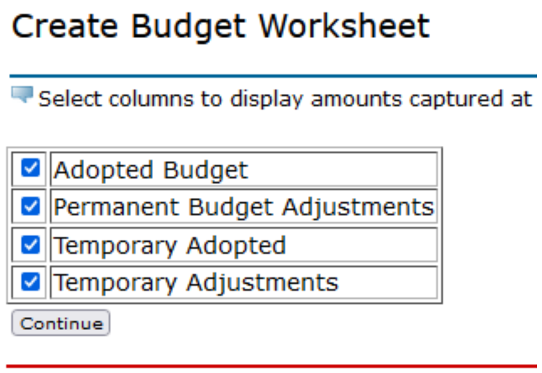
Budget Planner

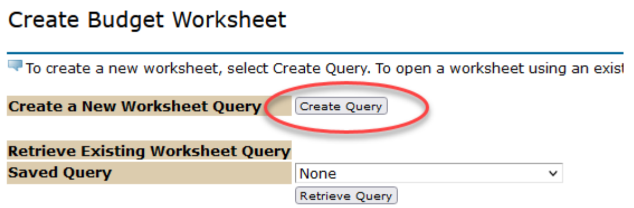
WHERE TO ACCESS? ONCE YOU HAVE THE BANNER ROLE, YOU WILL BE ABLE TO SEE THE BUDGET PLANNER MENU OPTION IN YOUR FINANCE TAB IN LOBOWEB

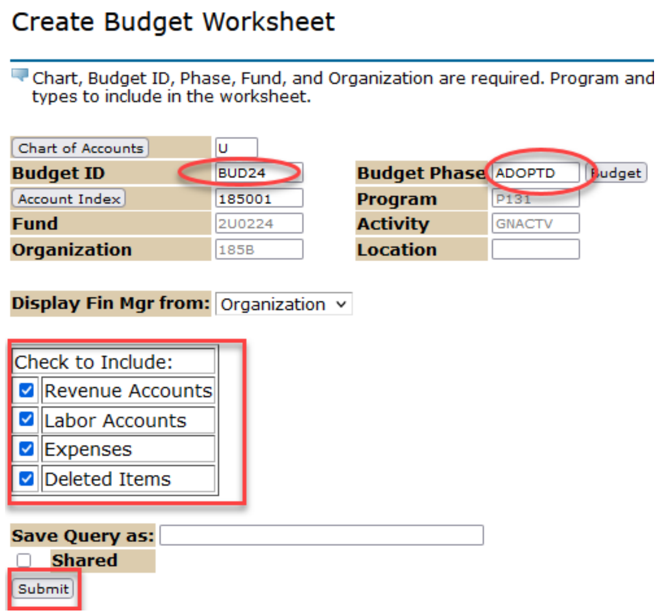


Budget Planner – Budget worksheet

1. Click on Create Budget Worksheet
2. Click on Create Query
3. Select columns to display, best to select all however you can select just “Adopted Budget” as well.
4. Budget ID will be: “BUDXX” XX the 2 digit fiscal year which you are preparing for.
5. Budget Phase should be: “ADOPTD”
6. Enter your specified Account Index you need to work on
7. Check to include all the category types of account codes
8. Click Submit







Budget Planner – Budget worksheet

- Input Change Values to each of the account codes as necessary to budge the index for the new fiscal year.
- Click on Calculate to view the impact of changes. If you are not satisfied with the results and have not yet clicked on Post(Save), you may return values last posted by using the "Requery" button located below the worksheet

OPAL	N				80K0	Banner Tax	
OPAL	N				80K2	Foundation Surcharge	

New rows may be added within the parameters used to create the worksheet.
Select Calculate to update the worksheet with additions, subtractions, percentage adju
Select Post to recalculate and save changes.
Select Requery to return to values last posted.

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

Requery Calculate Post

Download All Worksheet Columns Download Selected Worksheet Columns

Worksheet Parameters

Budget Worksheet					
Chart of Accounts	U	University of New Mexico	Duration	All	
Budget Id	BUD24	2024 Budget ID	Budget Phase	ADOPTD	2024 Adopted Phase
Account Index	712000	113080-DIRECTOR OF BU-General Activ	Fund Type	02	CU Main
Fund	2U0224	MU I & G	Program	P131	Institutional Support
Organization	712A	Budget Office	Activity	GNACTV	General Activity
Account	All		Location		
Financial Manager			Financial Manager		

Jump To Bottom   Return to Index Page

Enter Amount +/- 9999999999.99 to add/subtract. Select percent to increase/decrease by New Budget times Amount/100. Select rounding factor for mass and line changes by percent.
Change value/Percent in Worksheet will override mass change during Calculate. Select Delete Record to set New Budget to .00 and delete budget line. Select the link on account code to view or maintain text.

Mass Change Parameters		
Change Value:	Percent	Calculate

Worksheet

Status	Text	Index Code	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Temporary Adopted	Temporary Adjustments	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		712000	P131		Institutional Support												
				5T	Intra University Activities												
OPAL	N			1640	Allocations Pooled Allocation Gen	995,134.00	0.00	0.00	0.00	995,134.00	P	1,171,278.00			176,144.00	1,171,278.00	
OPAL	N			1660	Allocations Other Gen	0.00	0.00	0.00	0.00	0.00	P	14,013.00			14,013.00	14,013.00	
				61	Operating Expense Labor												
SALP	N			2020	Administrative Professional Gen	0.00	0.00	0.00	0.00	0.00	P	847,615.00			847,615.00	847,615.00	
SALP	N			2060	Support Staff Salary Detail Gen	0.00	0.00	0.00	0.00	0.00	P	0.00			0.00	0.00	
				62	Operating Expense Fringe												
OPAL	N			2110	Fica Gen	54,103.00	0.00	0.00	0.00	54,103.00	P	64,843.00			10,740.00	64,843.00	

Once you are satisfied with the change value numbers click on "Post" to save your changes

Budget Planner – Budget worksheet

- Continue making necessary changes to all account codes (except labor) until Proposed Budget for the index is accurate and in balance: Revenues minus expenses equal Zero.
- Totals for labor account codes come from Salary Planner labor distributions and cannot be edited in the Budget worksheet

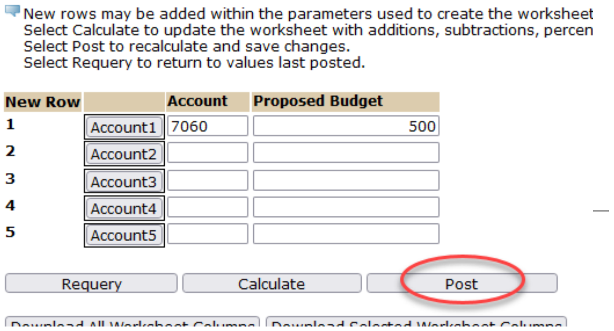
Summary Totals

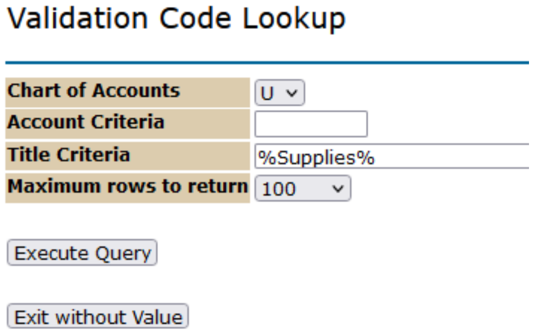
Account Type	Account Type Title	Base Budget	Proposed Budget	New Budget	Cumulative Change
51	Operating Revenues	0.00	0.00	0.00	0.00
5T	Intra University Activities	171,427.00	138,251.00	138,251.00	(33,176.00)
50	**Revenues and Intra Univ Activities**	**171,427.00**	**138,251.00**	**138,251.00**	**(33,176.00)**
61	Operating Expense Labor	0.00	71,780.00	71,780.00	71,780.00
62	Operating Expense Fringe	40,507.00	31,647.00	31,647.00	(8,860.00)
60	**Operating Expenses-Labor**	**40,507.00**	**103,427.00**	**103,427.00**	**62,920.00**
71	Operating Expense Other	35,000.00	34,824.00	34,824.00	(176.00)
70	**Other Expense**	**35,000.00**	**34,824.00**	**34,824.00**	**(176.00)**
Net		**95,920.00**	**0.00**	**0.00**	**(95,920.00)**

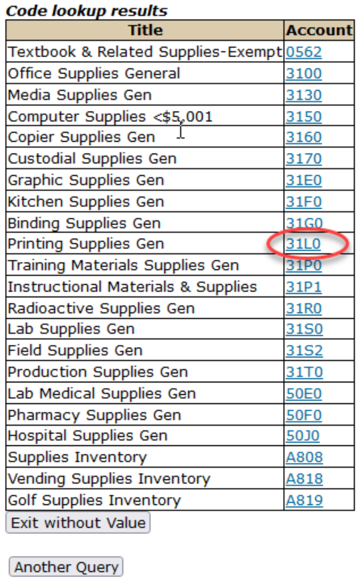
				61		Operating Expense Labor								
SALP	N				2020	Administrative Professional Gen	0.00	0.00	0.00	0.00	0.00	P	71,780.00	
SALP	N				20J0	Student Salaries Gen	0.00	0.00	0.00	0.00	0.00	P	0.00	
SALP	N				20N0	State Workstudy Gen	0.00	0.00	0.00	0.00	0.00	P	0.00	
				62		Operating Expense Fringe								

Budget Planner – Budget worksheet

- Account codes may be added to the budget worksheet (if new index all account codes (except labor) need to be added)
- Enter the account code(s) in the account column and enter the total budgeted amount in the Proposed Budget column, then click Post.
- If you are unsure of the account code you can do a "Validation Code Lookup" by clicking on "Account1,2,3, etc." buttons, Type in a Criteria with % signs to pull in account codes associated with the criteria specified
- Click on the account code you need to add.
- This will take you back to the worksheet where you can then enter the proposed budget amount, then click Post.





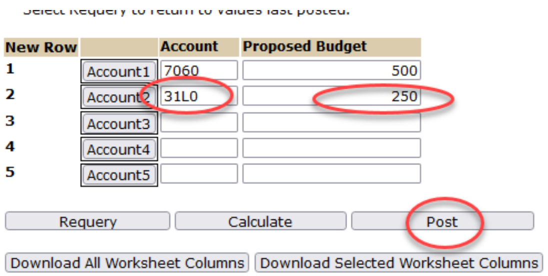


Code lookup results

Title	Account
Textbook & Related Supplies-Exempt	0562
Office Supplies General	3100
Media Supplies Gen	3130
Computer Supplies <$5,001	3150
Copier Supplies Gen	3160
Custodial Supplies Gen	3170
Graphic Supplies Gen	31E0
Kitchen Supplies Gen	31F0
Binding Supplies Gen	31G0
Printing Supplies Gen	31L0
Training Materials Supplies Gen	31P0
Instructional Materials & Supplies	31P1
Radioactive Supplies Gen	31R0
Lab Supplies Gen	31S0
Field Supplies Gen	31S2
Production Supplies Gen	31T0
Lab Medical Supplies Gen	50E0
Pharmacy Supplies Gen	50F0
Hospital Supplies Gen	50J0
Supplies Inventory	A808
Vending Supplies Inventory	A818
Golf Supplies Inventory	A819

Exit without Value

Another Query



Budget Planner – Budget Worksheet

Frequent toggles needed between Salary Planner and Budget planner, and there are navigation links at the bottom of the pages in loboweb.

	60	Operating Expenses-Labor	40,507.00	103,427.00	103,427.00	62,920.00
71		Operating Expense Other	35,000.00	34,824.00	34,824.00	(176.00)
	70	**Other Expense**	**35,000.00**	**34,824.00**	**34,824.00**	**(176.00)**
	Net		**95,920.00**	**0.00**	**0.00**	**(95,920.00)**

Return To Top   Return to Index Page

[Operating Ledger Queries | Encumbrance Query | Approve Documents | View Document | Journal Voucher Entry | Budget Planner Menu | Categorization of Reserves | Non-person (Company) Search]

Budget Worksheet

ude led itions	**Include Vacant Positions**
	Yes

List By Employee in Salary Planner

List By Position | Summary Totals
Employee Filter | Position Filter

[Edit Scenario]

Edit Scenario Screen

[Organization Lock | Query Multiple Extracts | Salary Planner Reports Menu | Budget Planner Menu]

Budget Planner

- Users can make adjustments to line items as many times as necessary
- Any necessary changes to labor account codes must be done by adjusting labor distributions in Salary Planner
- The same process must be followed for every unrestricted index
- A department’s overall budget can be viewed by running Budget Development reports
- SOP’s can be found at our Budget Office website: Budget Planner / Development resources

Standard Operating Procedures (SOPs)

- Adjust Index Budgets
- Maintain Organizational Locks
- Budget Development Working Report
- Operating Budget Summary Report
- Index Out of Balance Exception Report
- Organization Summary Report
- Budgeted Account Code Report
- Budgeted Transfers/Allocations Report
- Budgeted Account Code Totals Report
- Budgeted Index/Account Comments Report
- Budgeted Indices Not Modified Report

Budget Planner

*** END ***