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
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

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

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

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

**Job Labor Distribution**

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

- **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”.

**Proposed**

<table>
<thead>
<tr>
<th>CUA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>U 032052</td>
<td>2U0224</td>
<td>032M</td>
<td>2020</td>
<td>P141</td>
<td>GNACV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>100.00</td>
<td>71,909.61</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add New Record**

**Proposed Position Distribution**

<table>
<thead>
<tr>
<th>CUA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
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<td>GNACV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>100.00</td>
<td>71,910.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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)
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.
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

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, or direct cash receipts.

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

Budget Planner Menu
- Manage or review Budget Development phase information, Manage phase organization locks, View Budget Development reports, or Update or review Salary Planner access information.

Category of Reserves
- Categorize Current Unrestricted Reserves according to UAP 7000

Non-person (Company) Search
- Search Banner for non-person (company) entities
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.

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
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.
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.
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.
Budget Planner

*** END ***