THE UNIVERSITY OF NEW MEXICO

BANNER 8 LABOR REDISTRIBUTION MODIFICATIONS

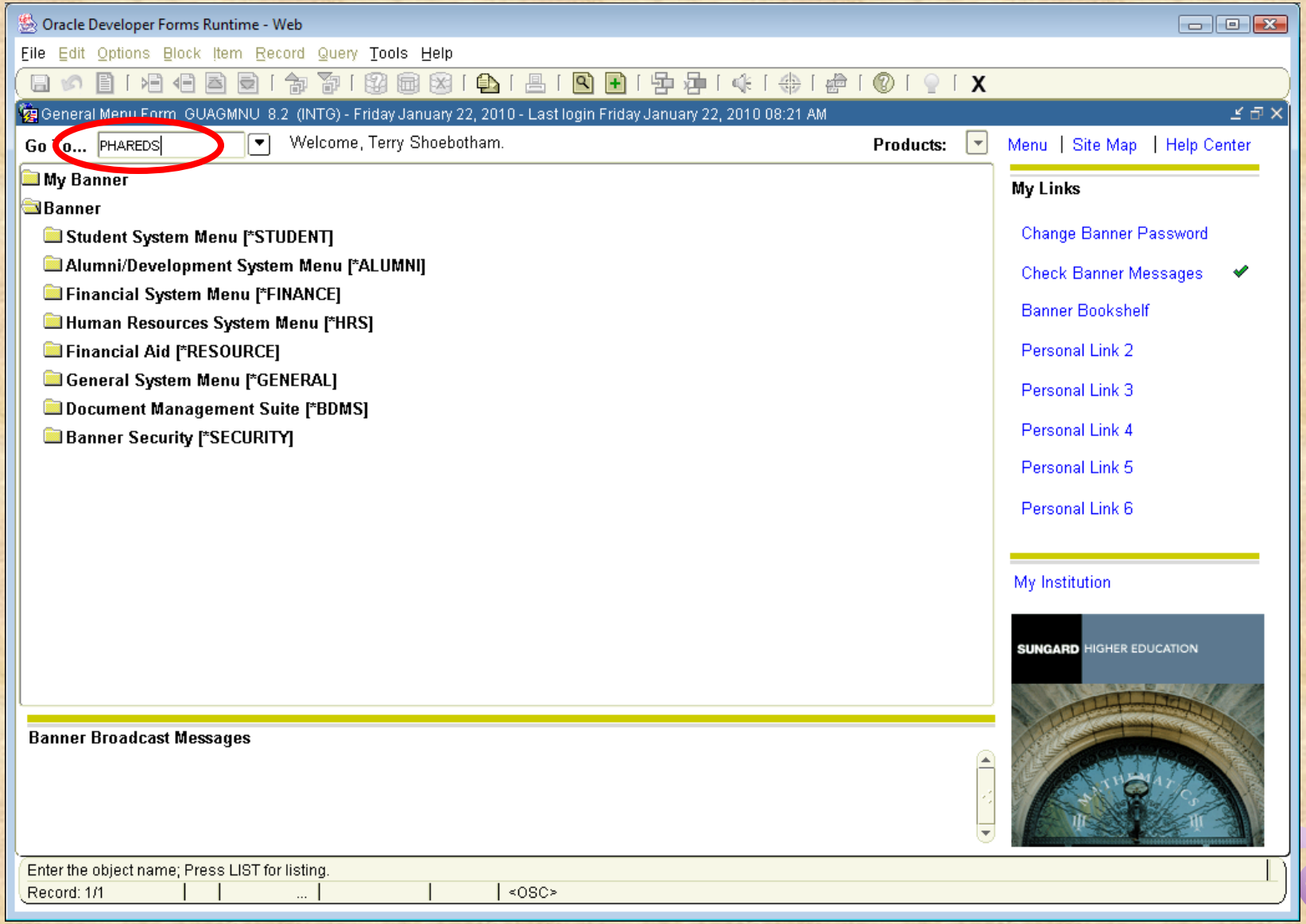
Presented by:

Laura Putz, HSC Unrestricted Accounting Manager

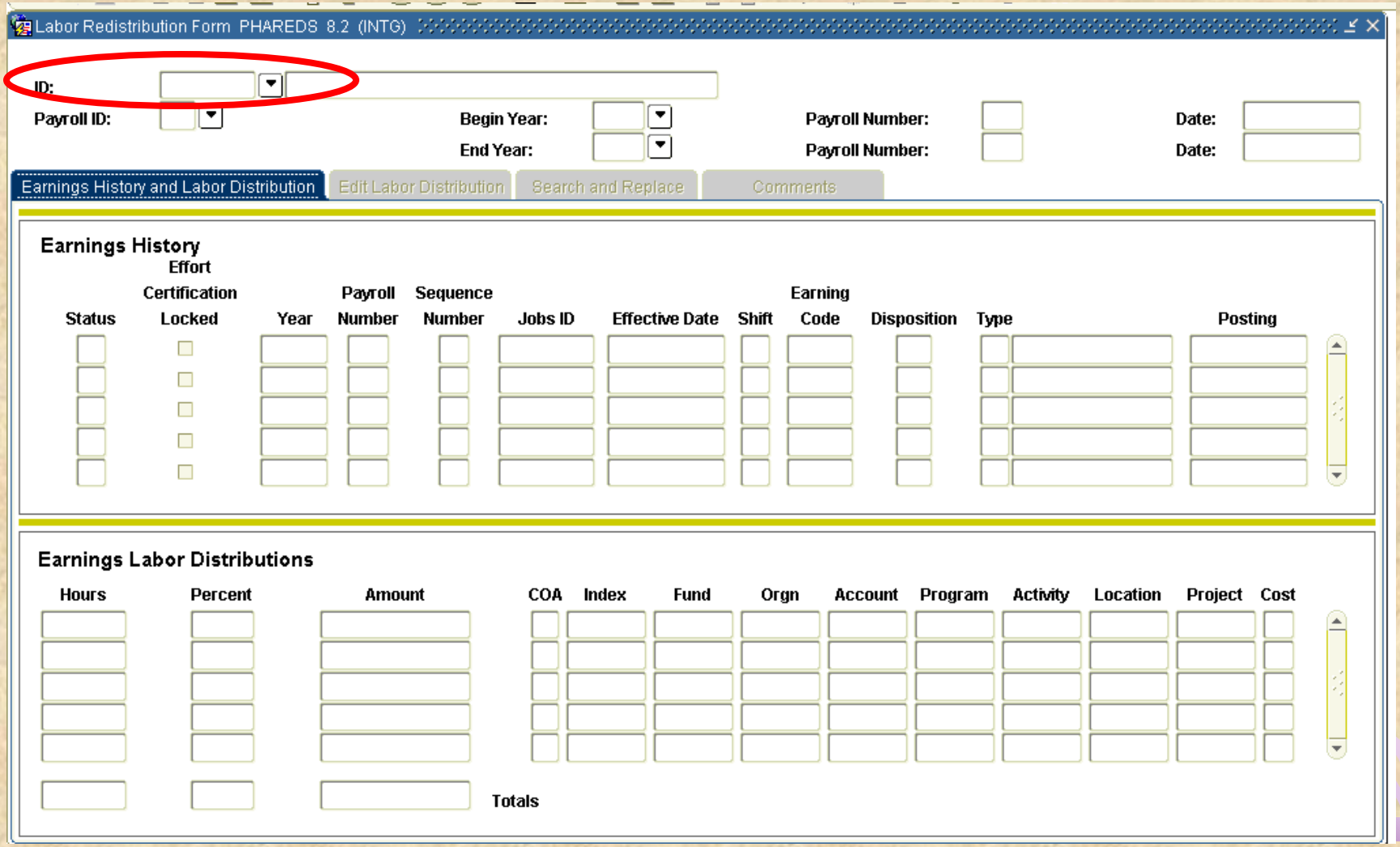
SUMMARY OF CHANGES

- Employee Self Service
- PZAREDS has been replaced with PHAREDS
- Approval queue now exists

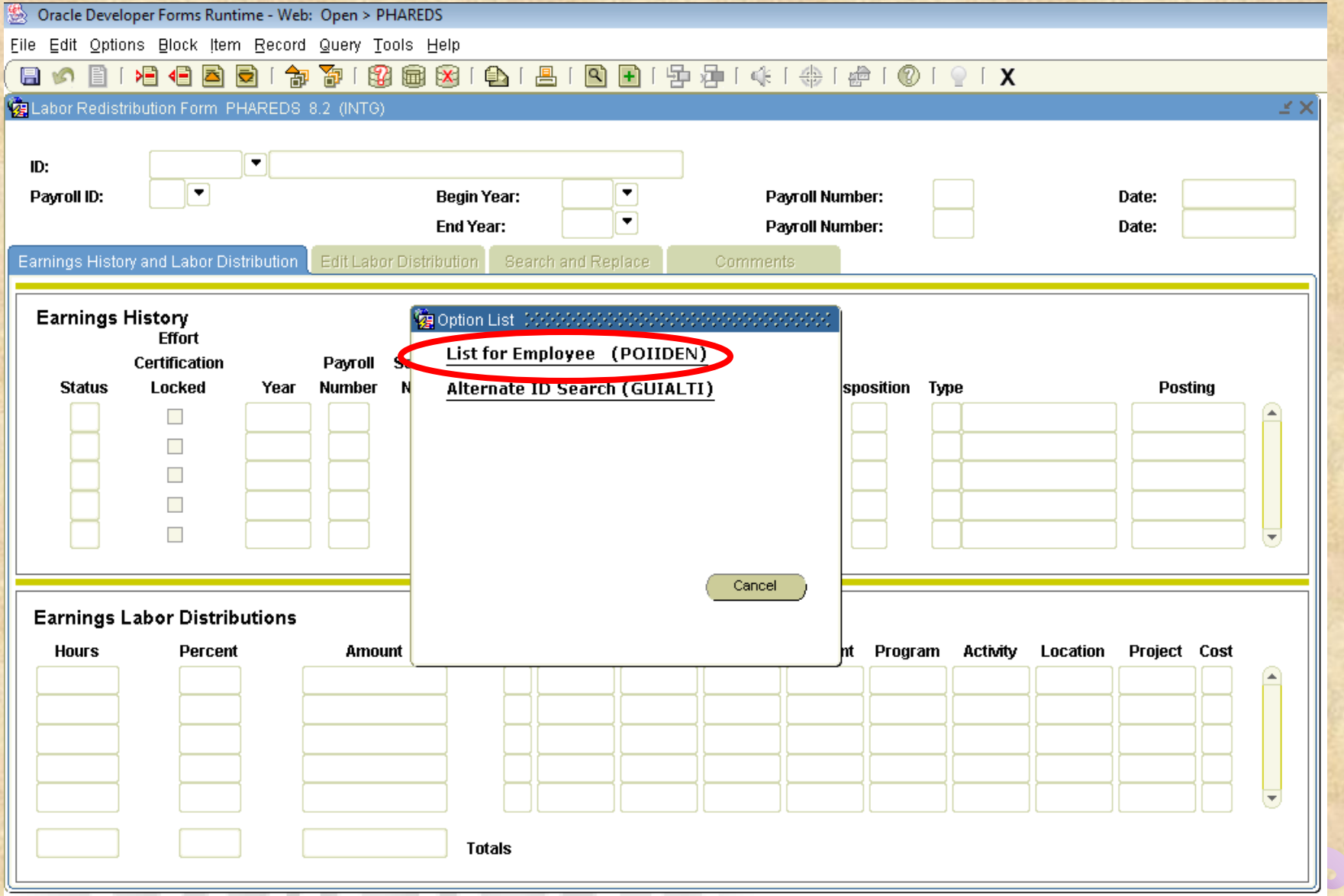
BANNER 8.0 - PHAREDS



BANNER 8.0 - PHAREDS



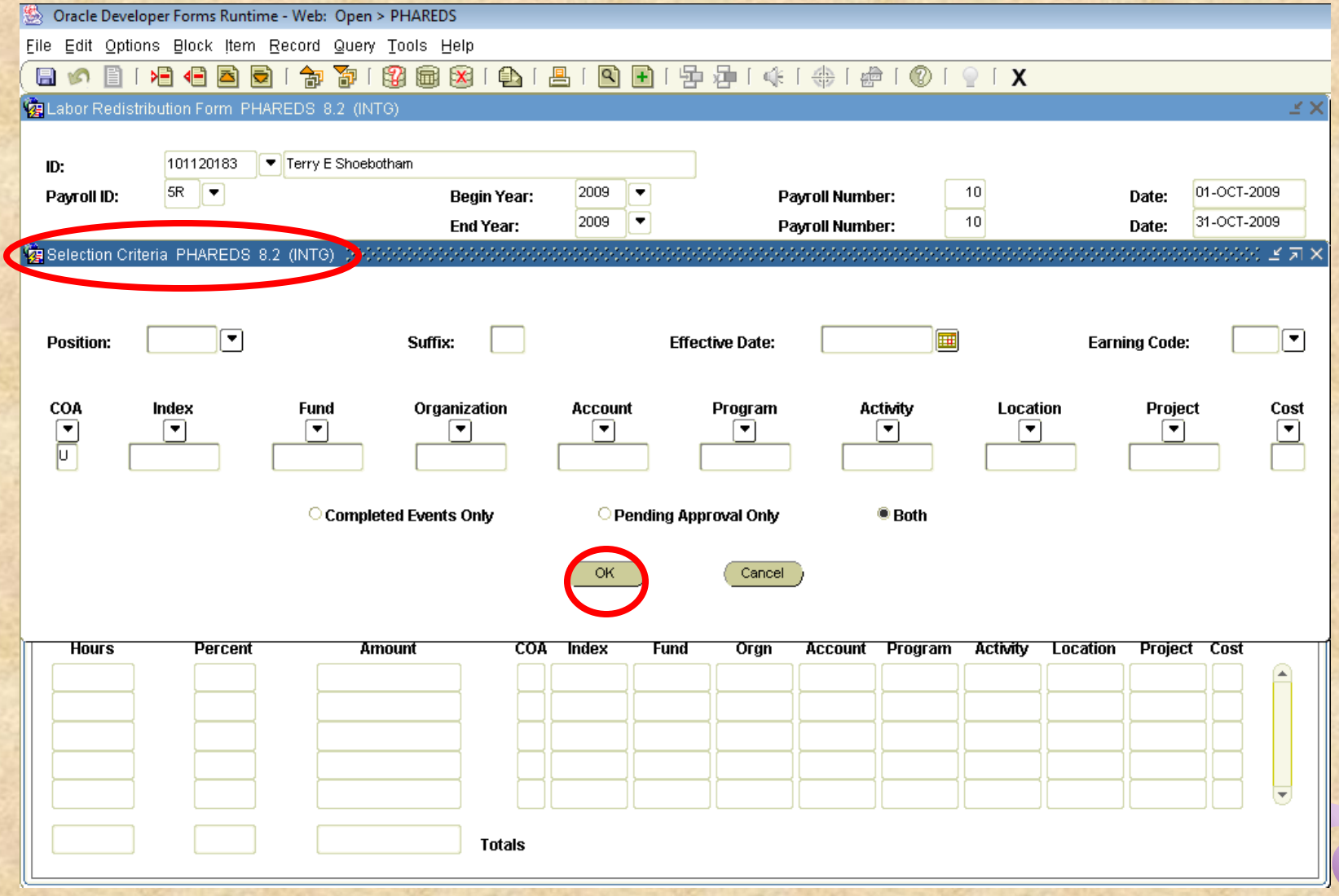
BANNER 8.0 - PHAREDS



BANNER 8.0 - PHAREDS

- Select Employee
- Select Payroll ID
  - Drop down arrow for choices
- Begin Year
- For multiple periods, type in Begin Year, Payroll Number and date, and End Year, Payroll number and date
- Tab

BANNER 8.0 - PHAREDS



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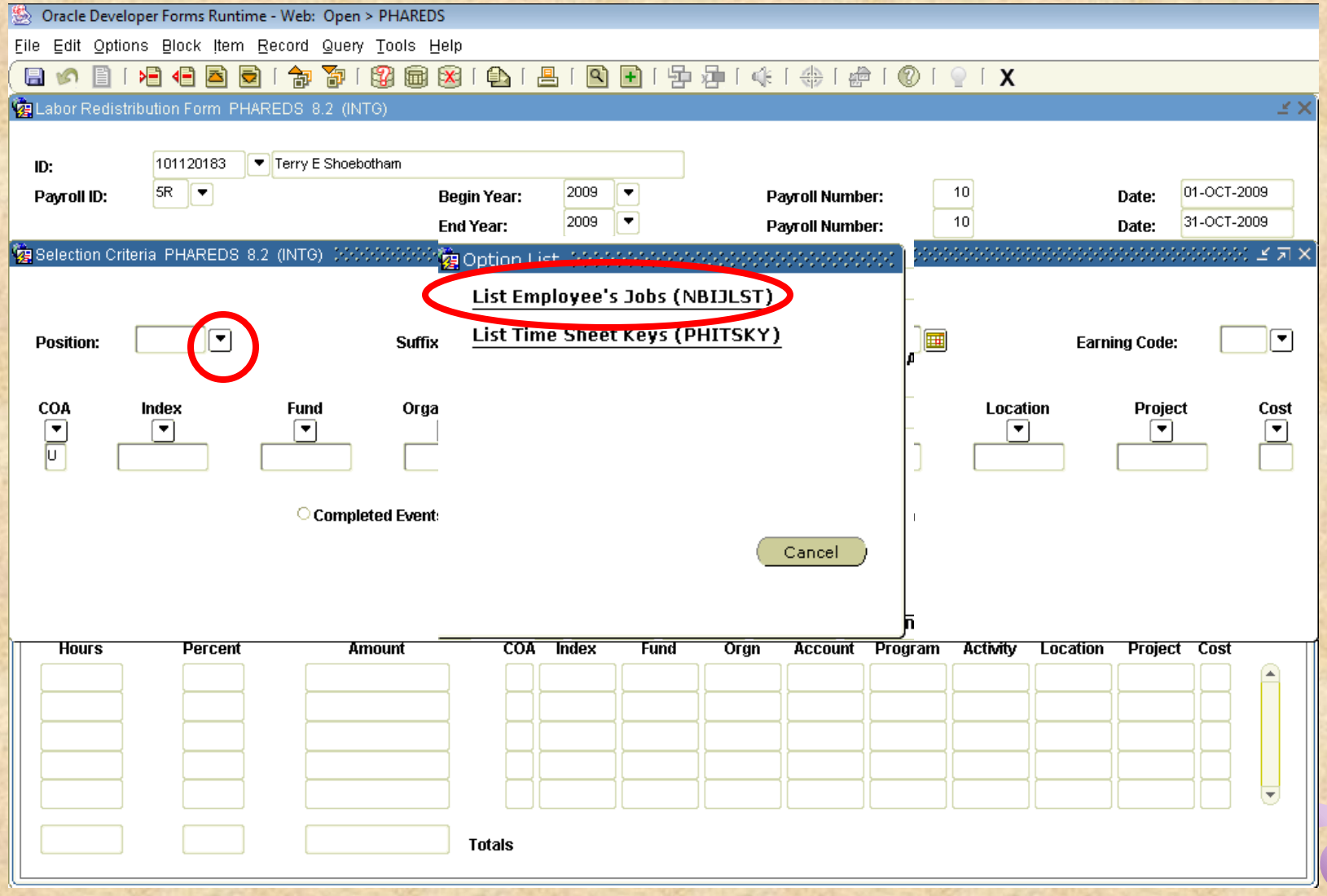

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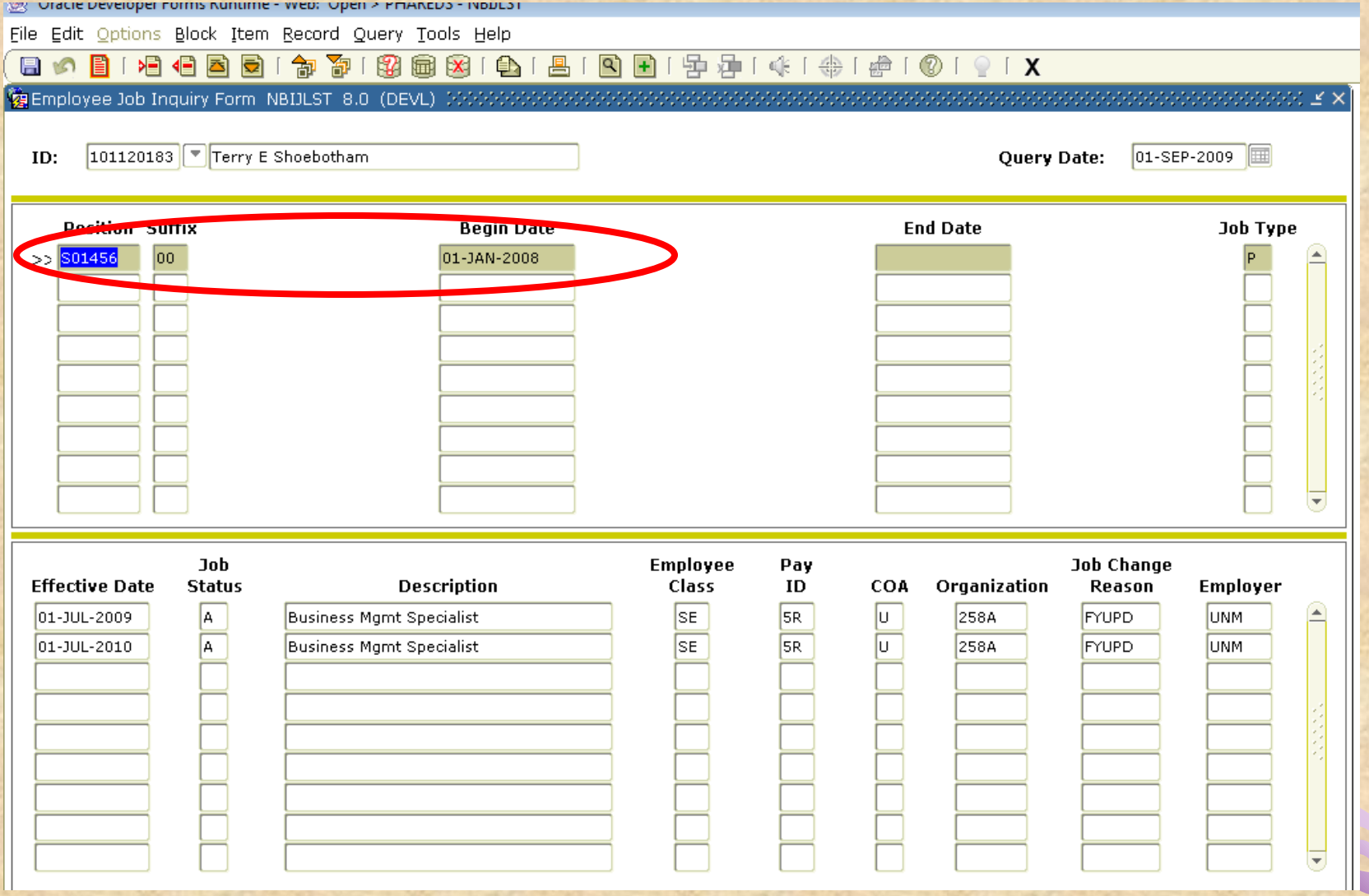

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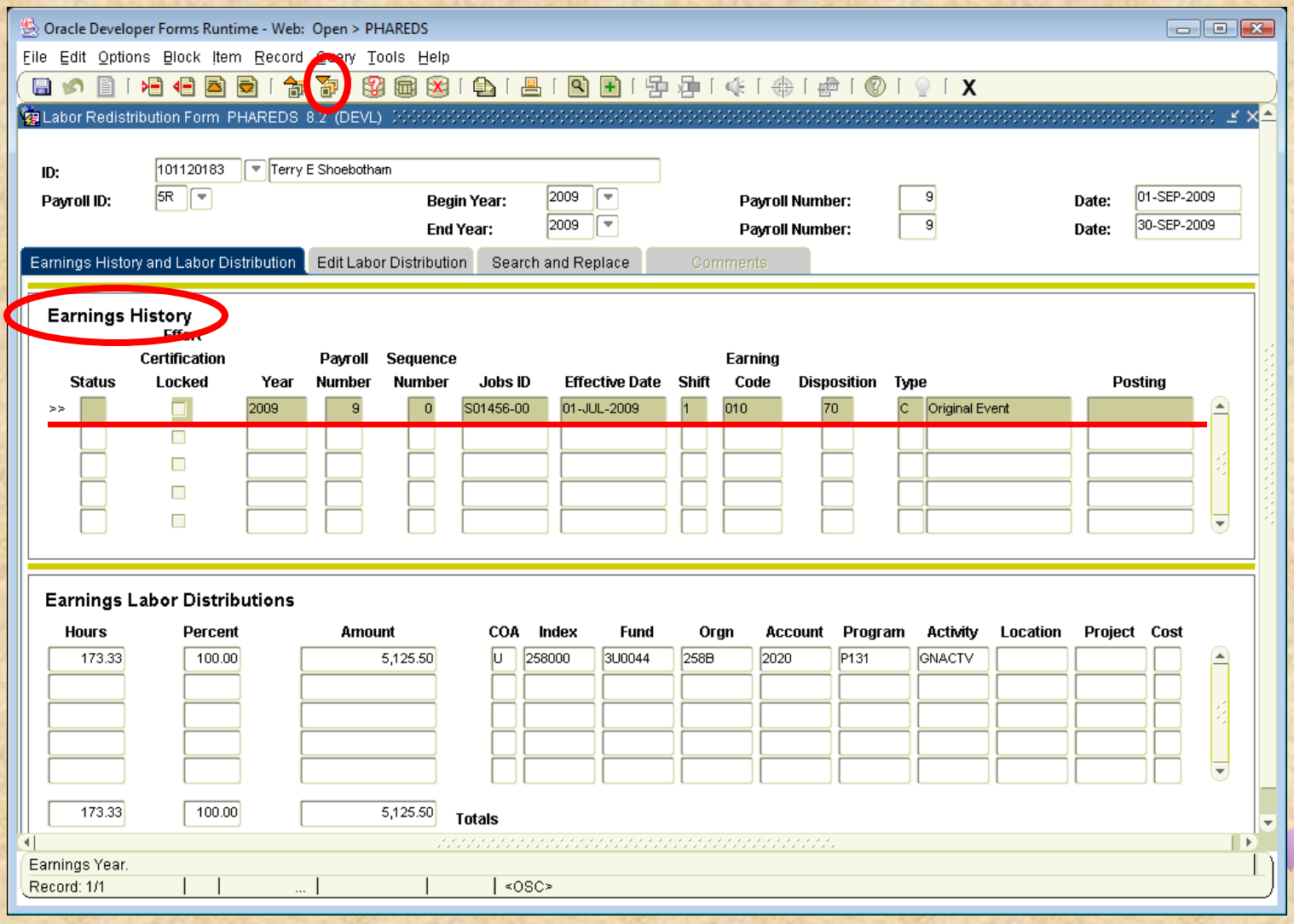

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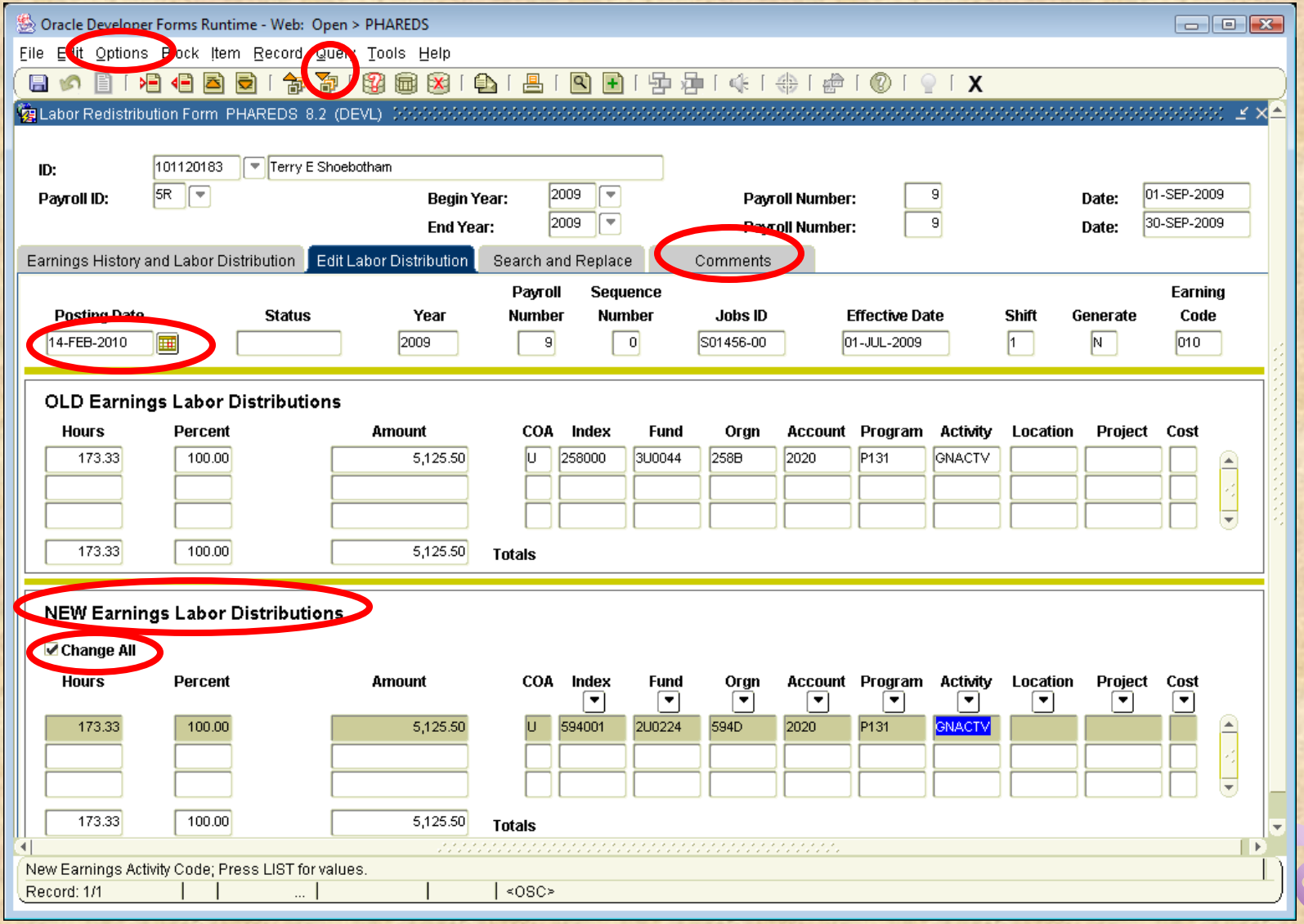

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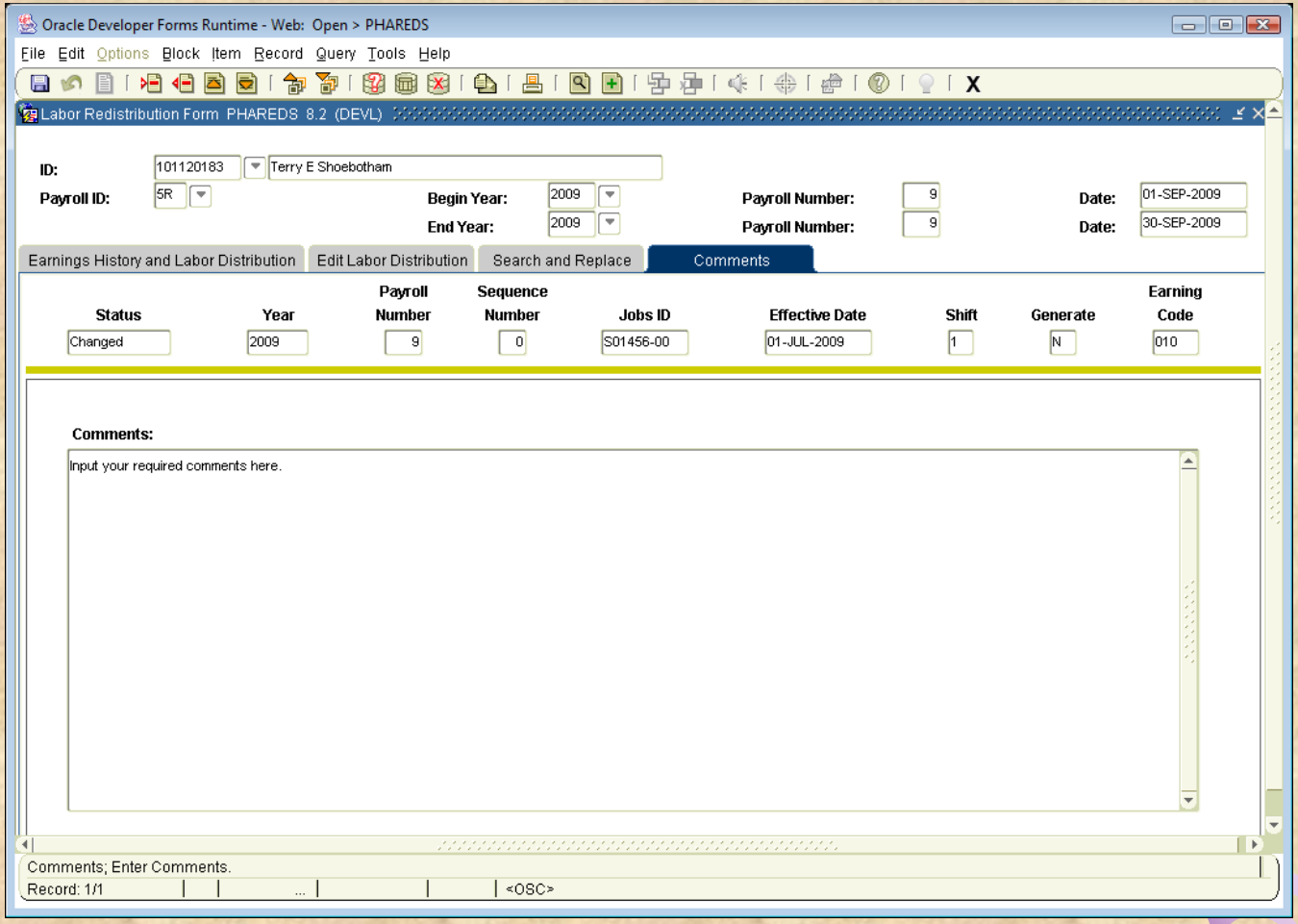

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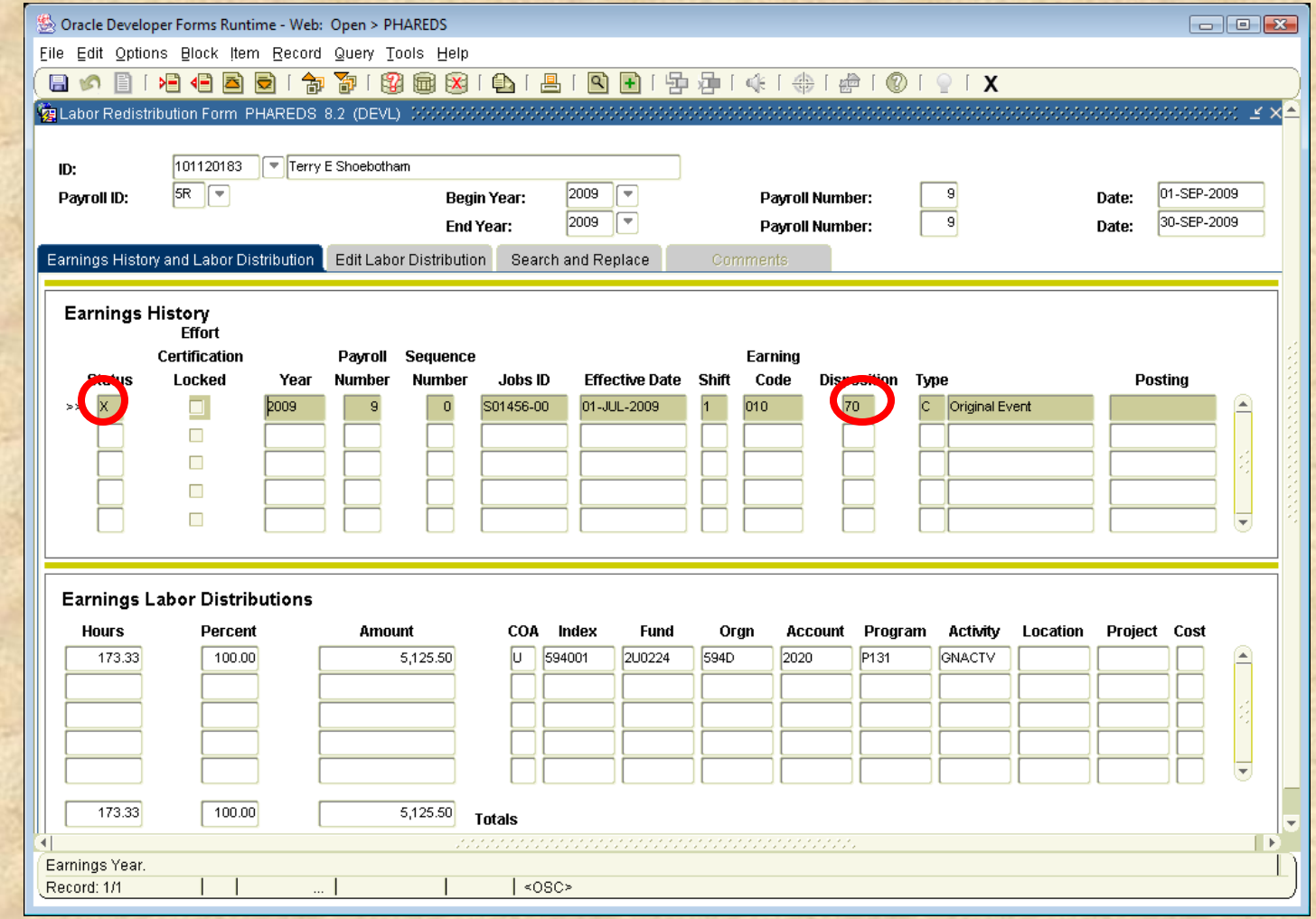
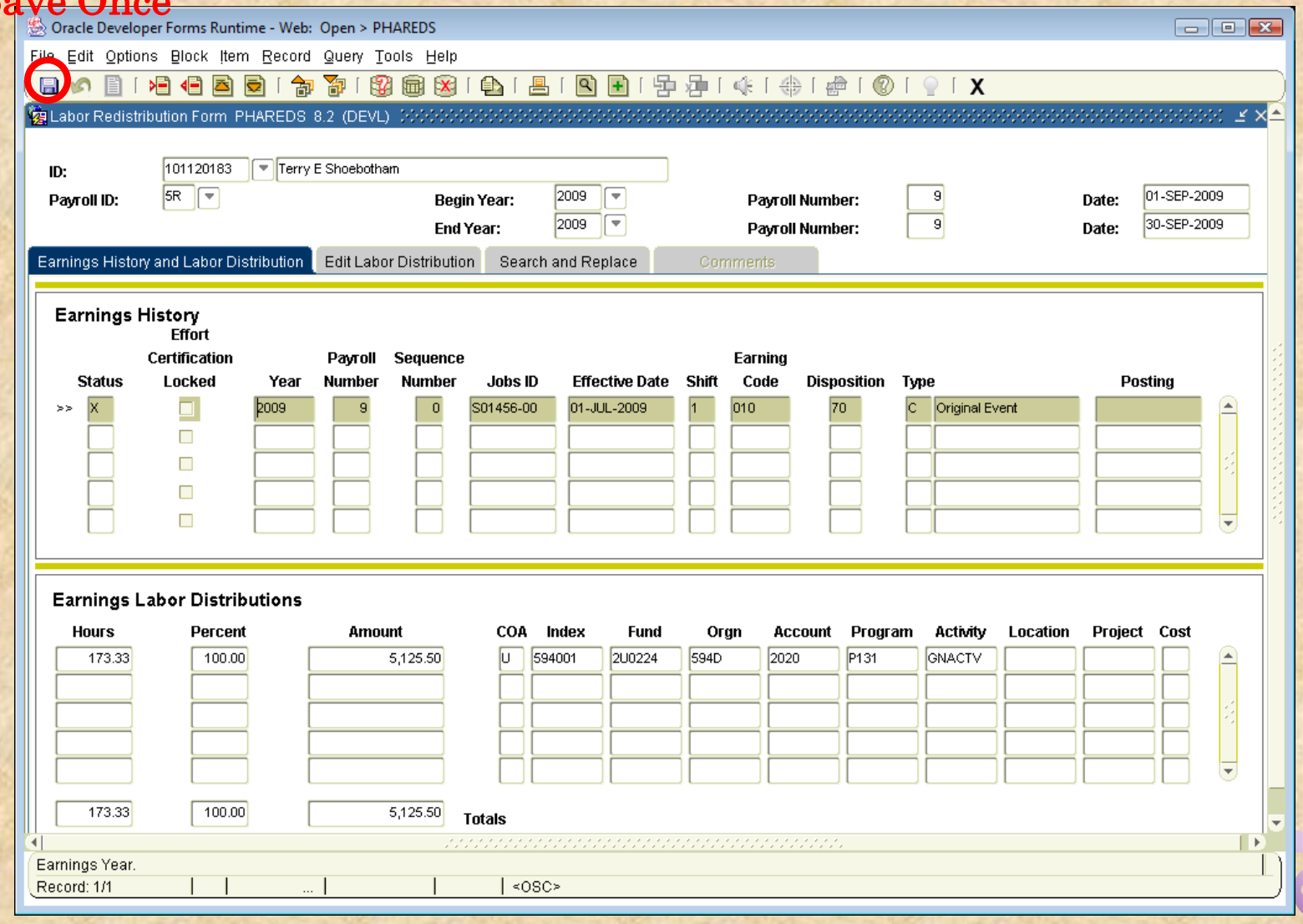


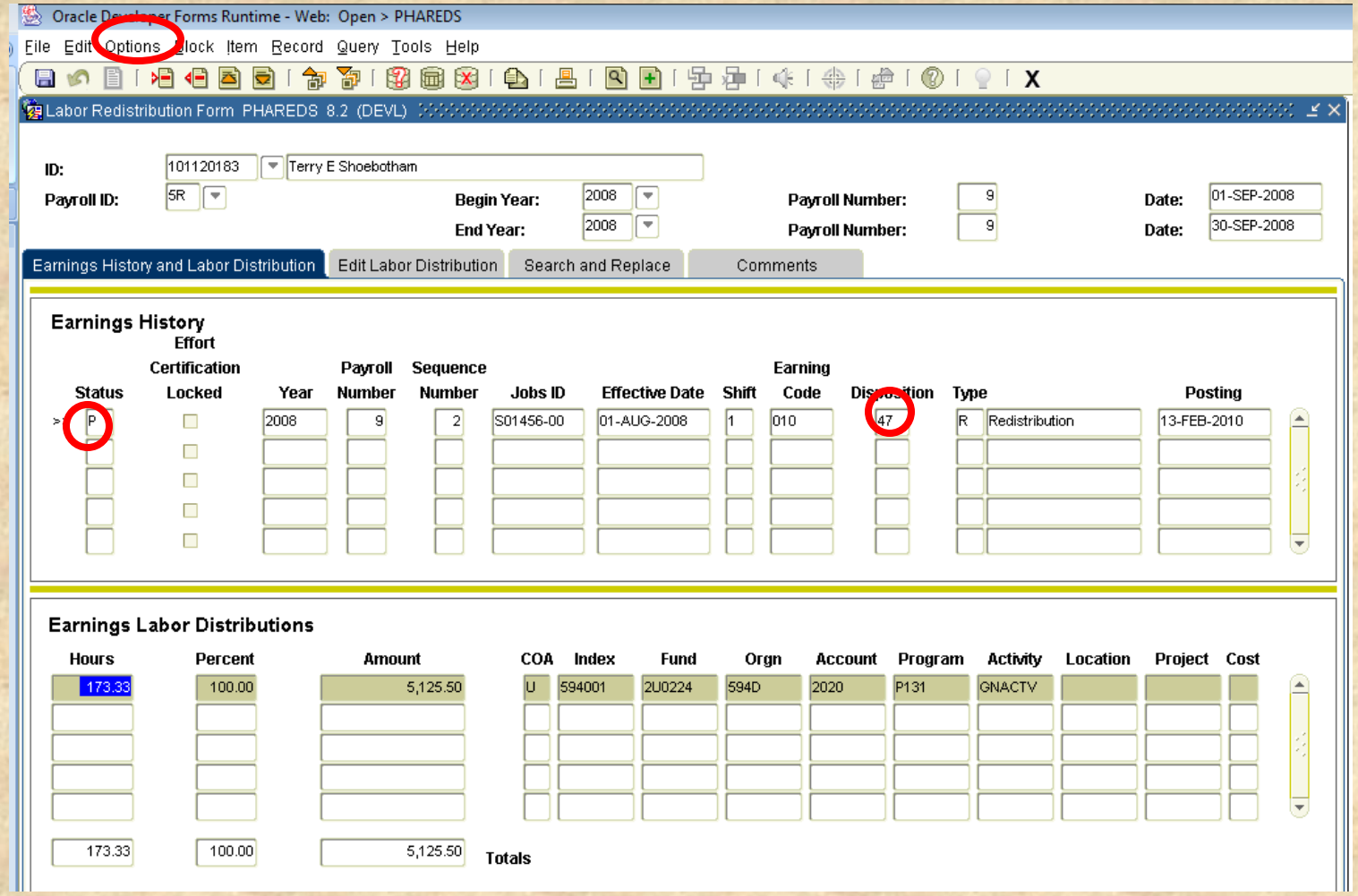
BANNER 8.0 - PHAREDS

Save Once



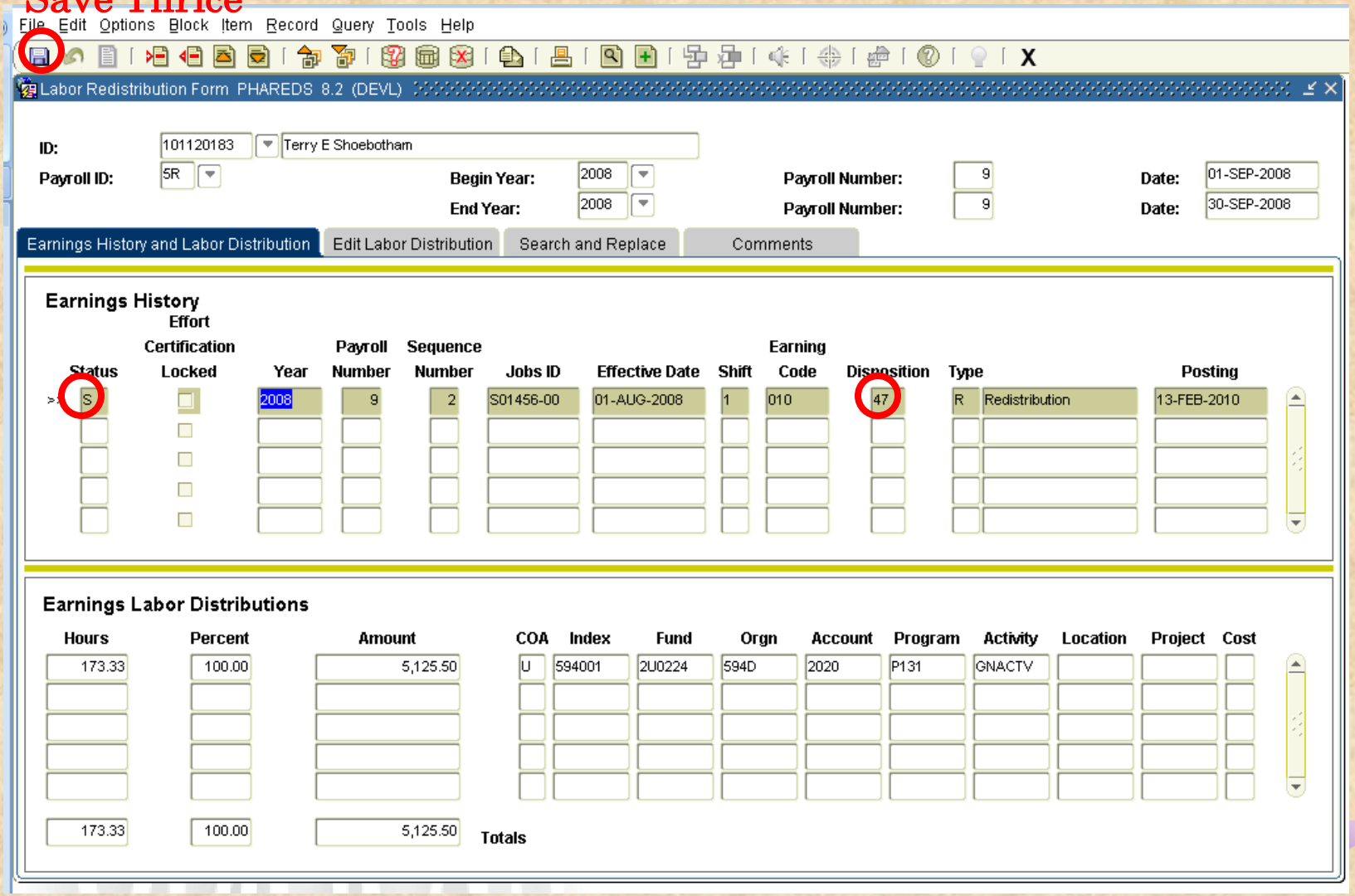
BANNER 8.0 - PHAREDS

Save Twice – Using "Options" menu to "Submit Redistribution"

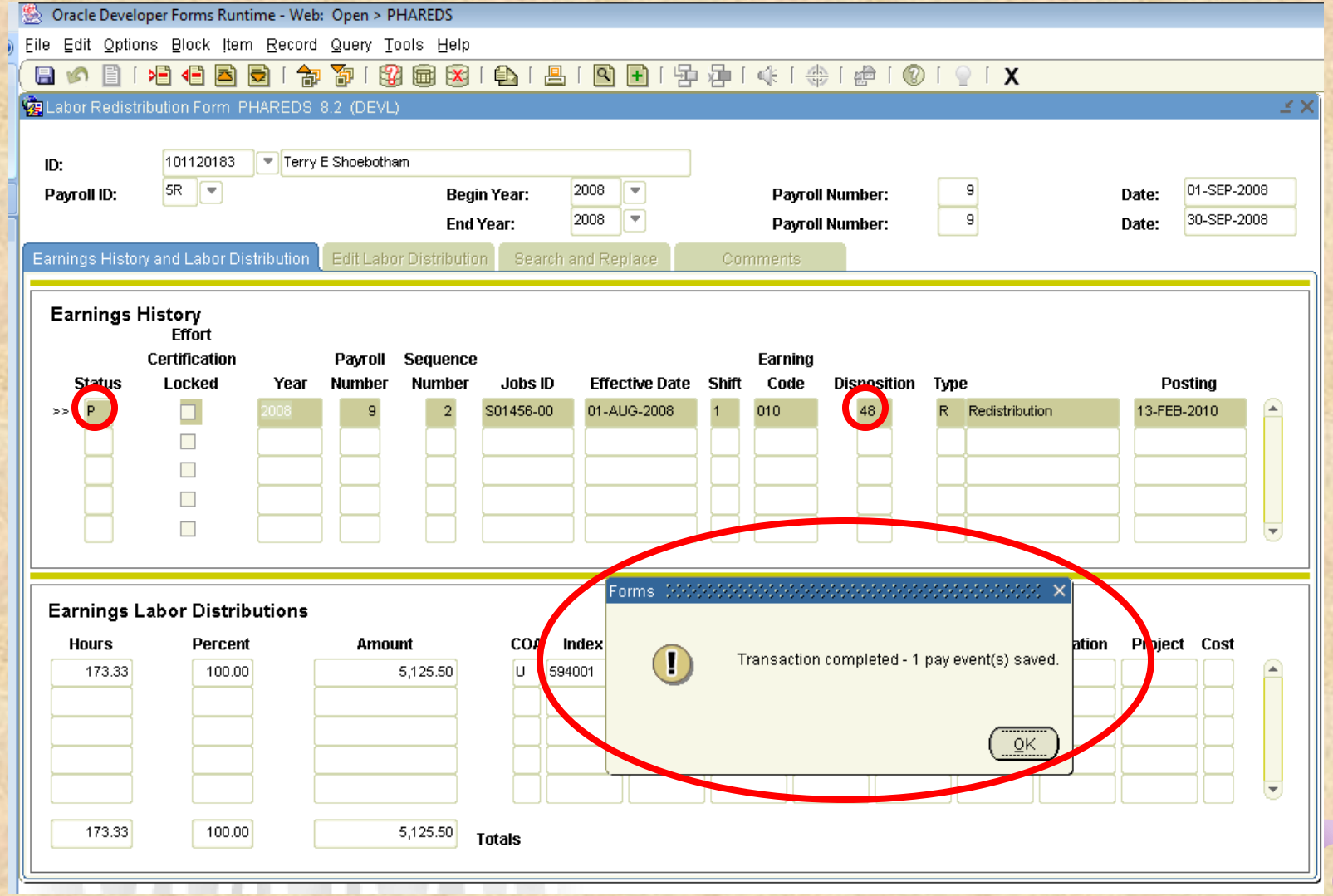


BANNER 8.0 - PHAREDS

Save Thrice



BANNER 8.0 - PHAREDS



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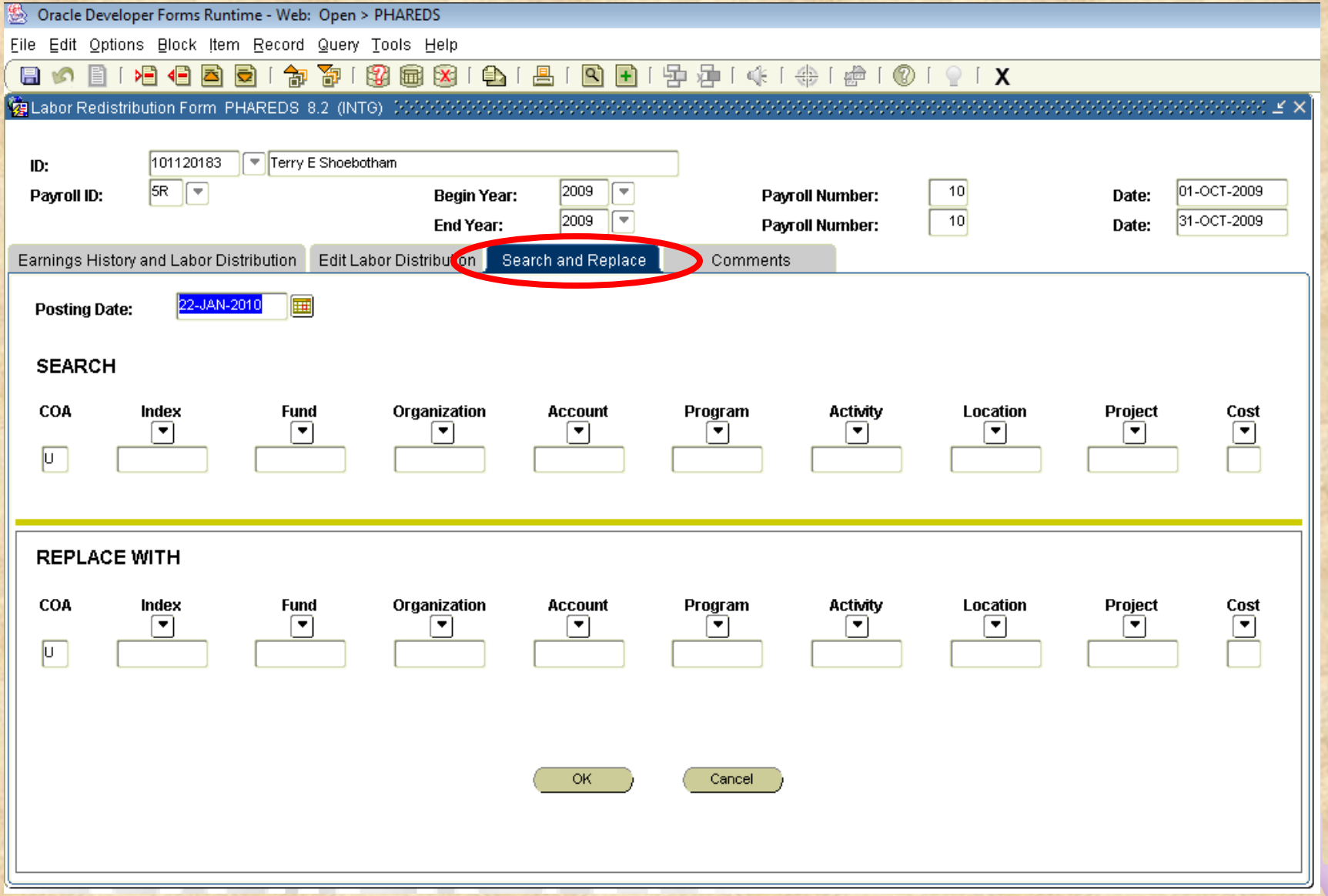


BANNER 8.0 - PHAREDS

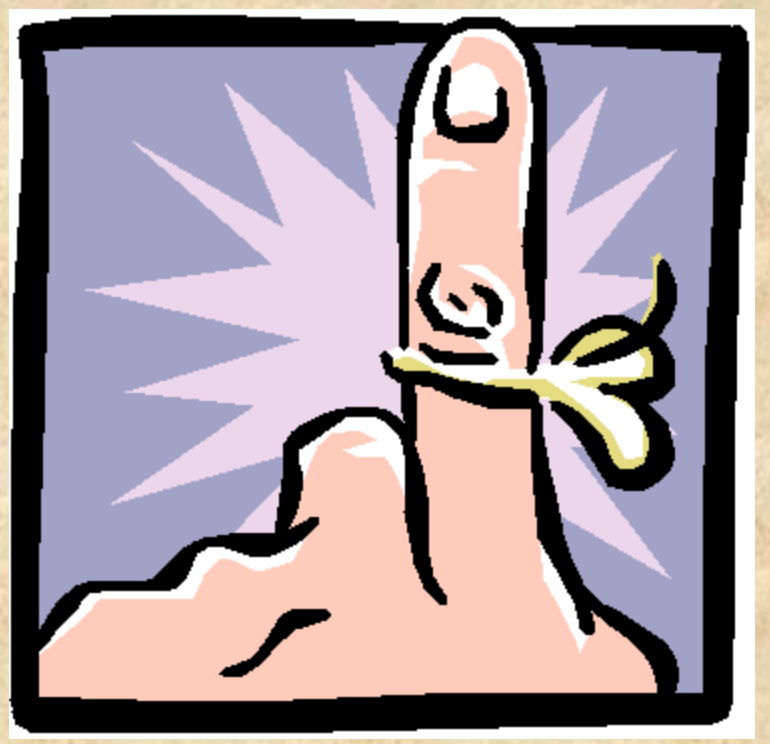
NOTE:

- You cannot change the labor account code by submitting a Labor Redistribution

BANNER 8.0 - PHAREDS

IN SUMMARY:

- Remember you must save three times
- Watch for updated material
- Attend upcoming March Labs if you have problems

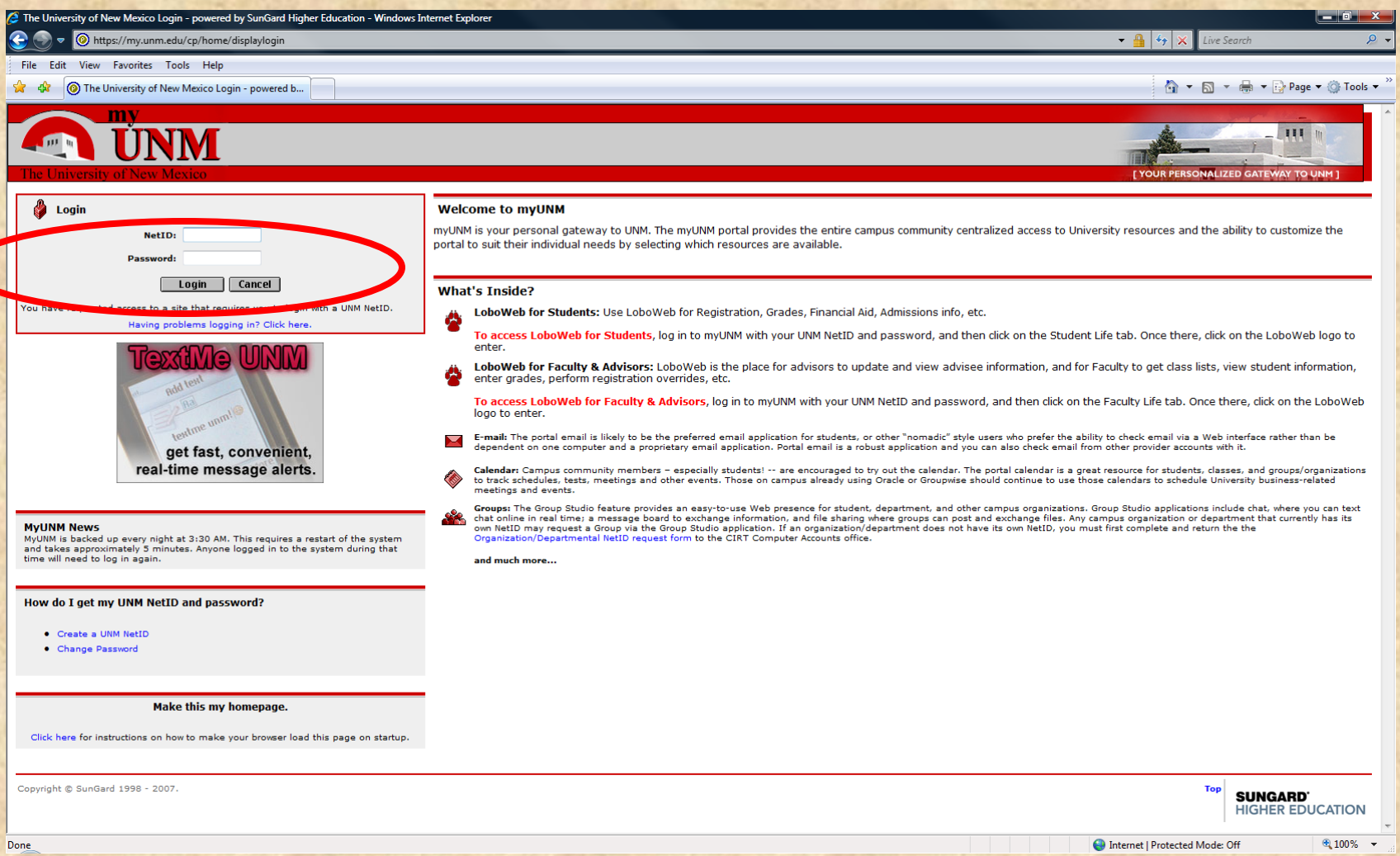


BANNER 8.0 - PHAREDS

IN SUMMARY:

- Reports are being developed. Notification to be sent when available.
- Review “Pending” Report available in ePrint NOW!

LOBOWEB EMPLOYEE SELF SERVICE



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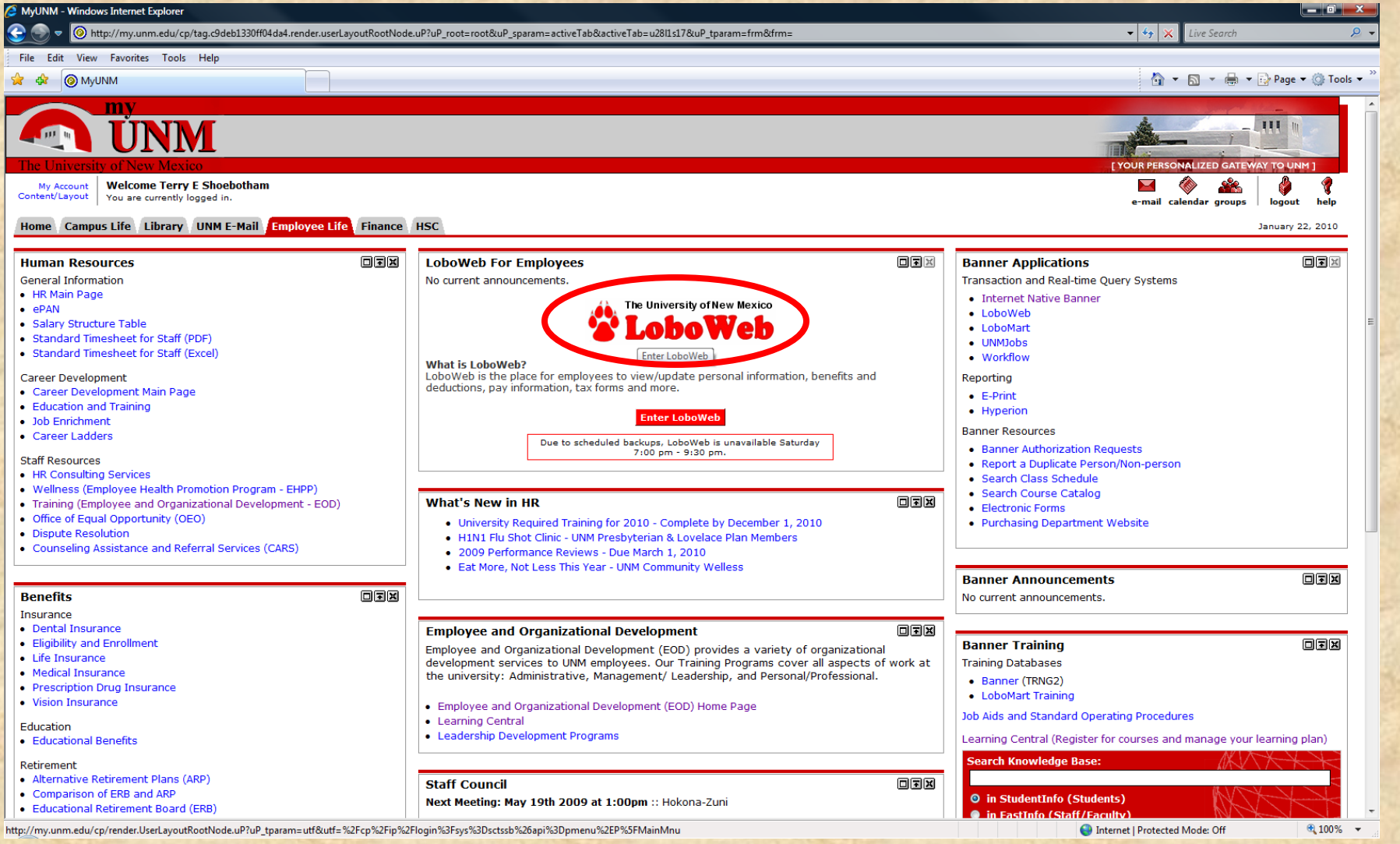

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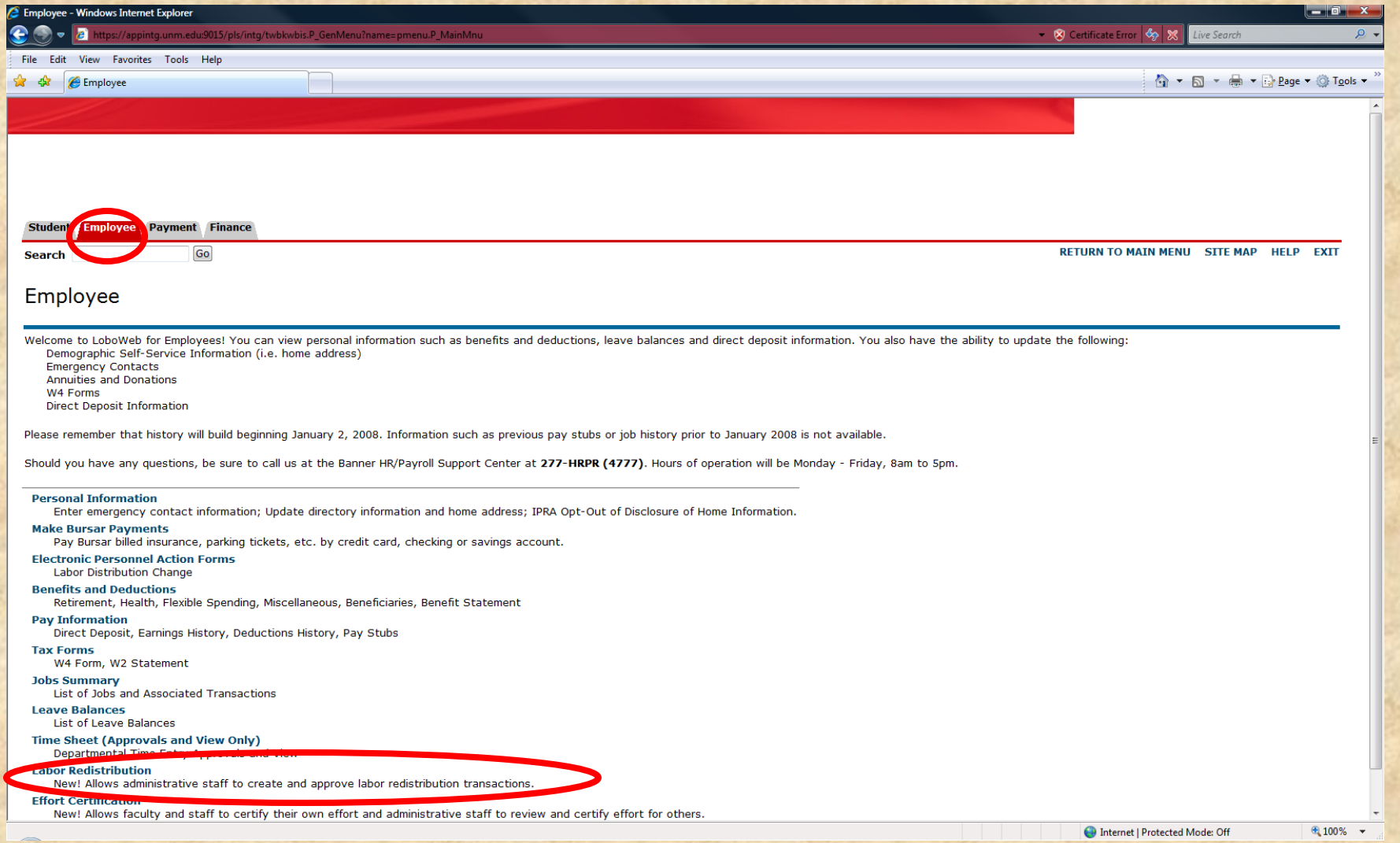

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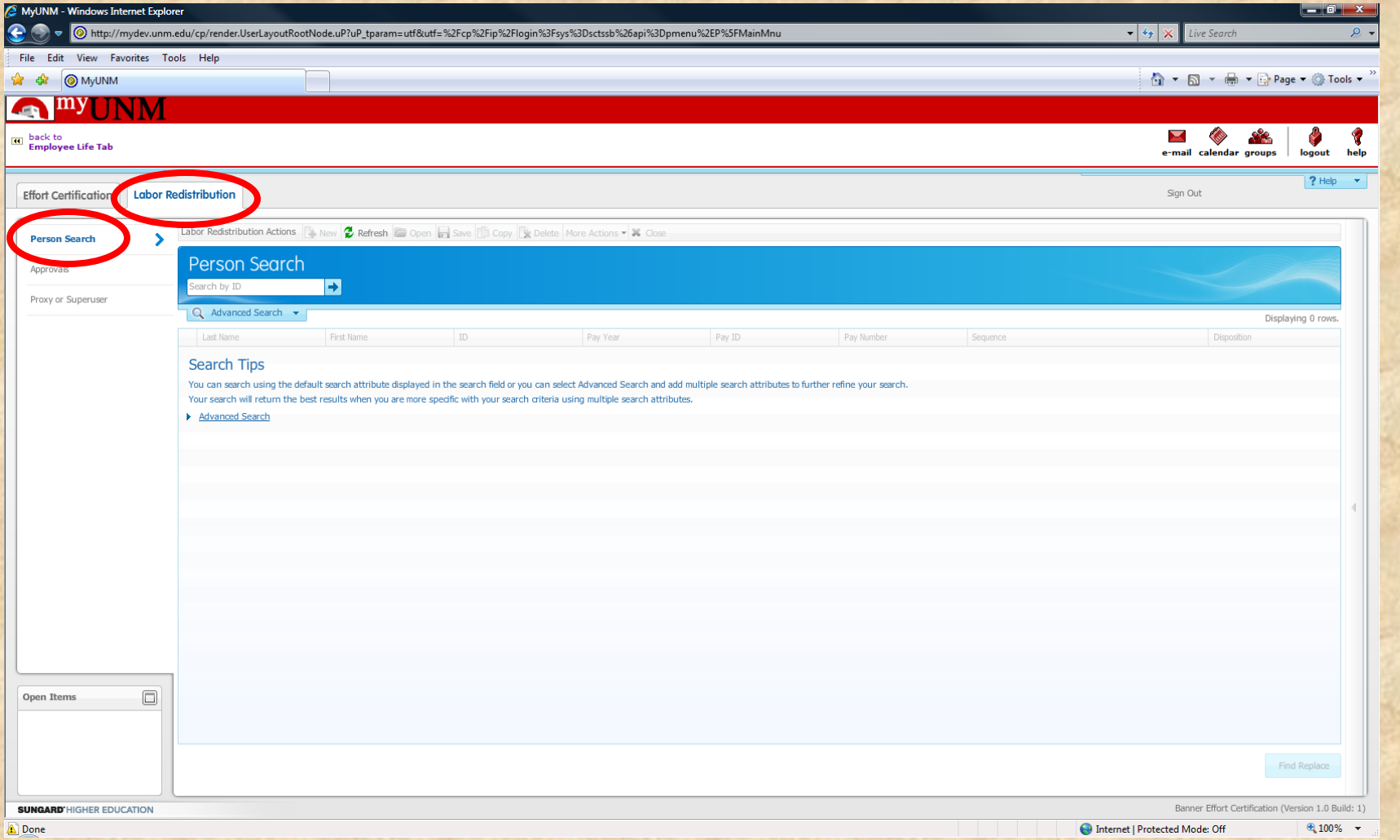

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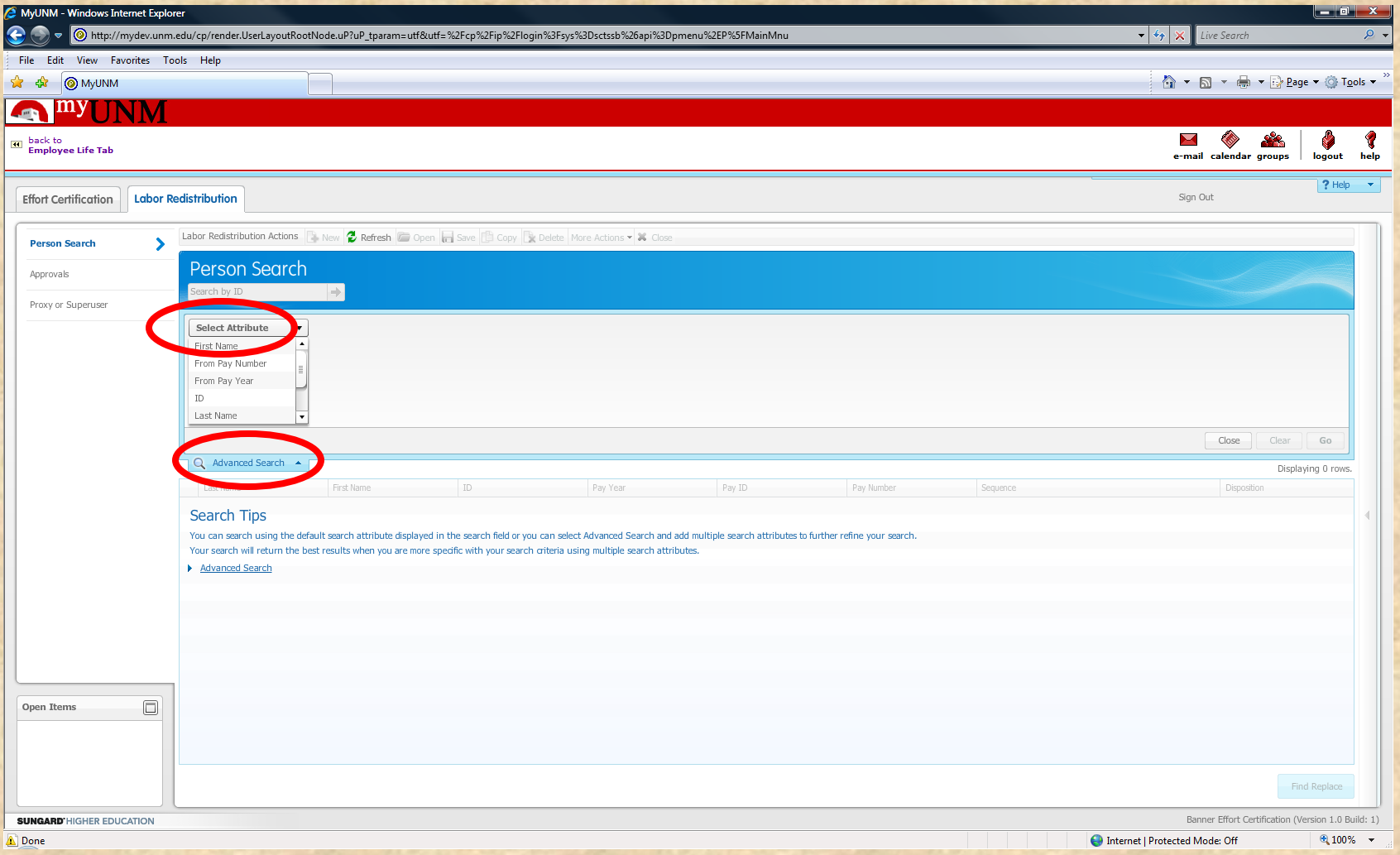

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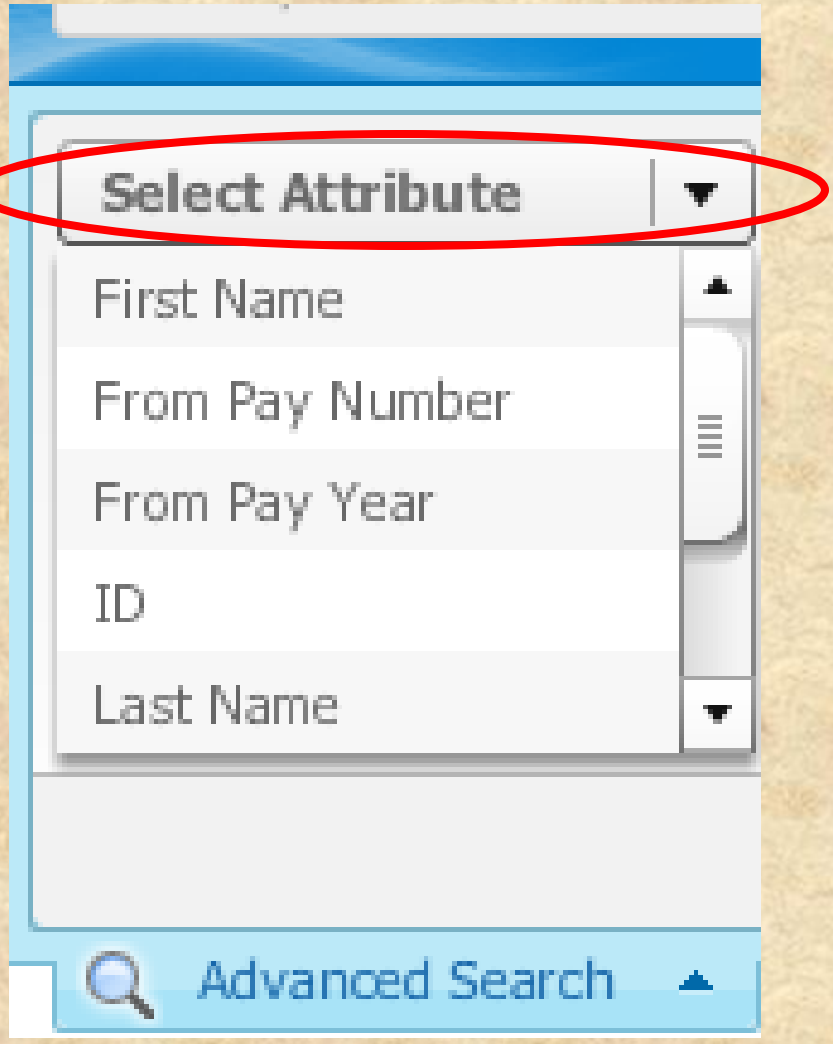

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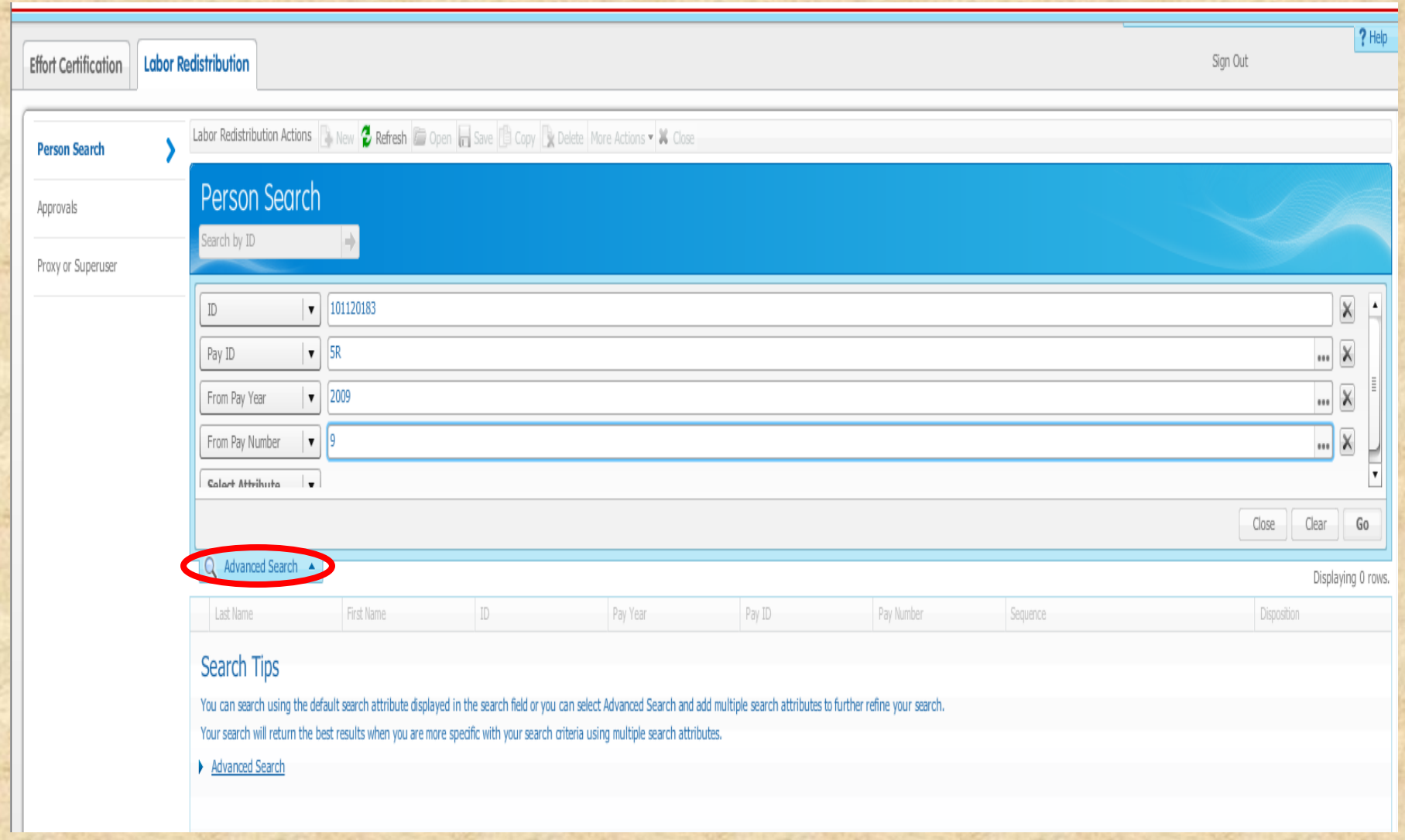

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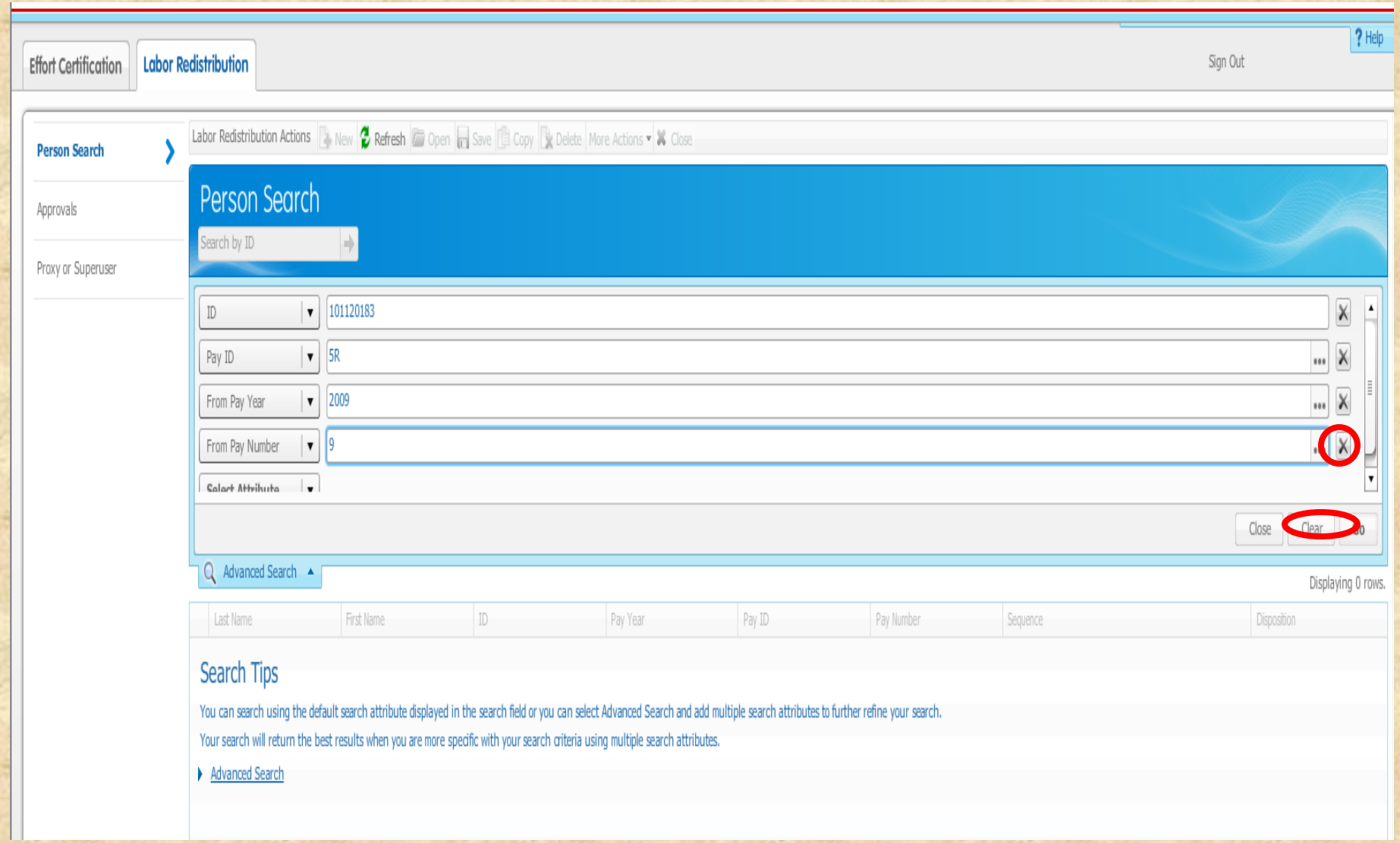

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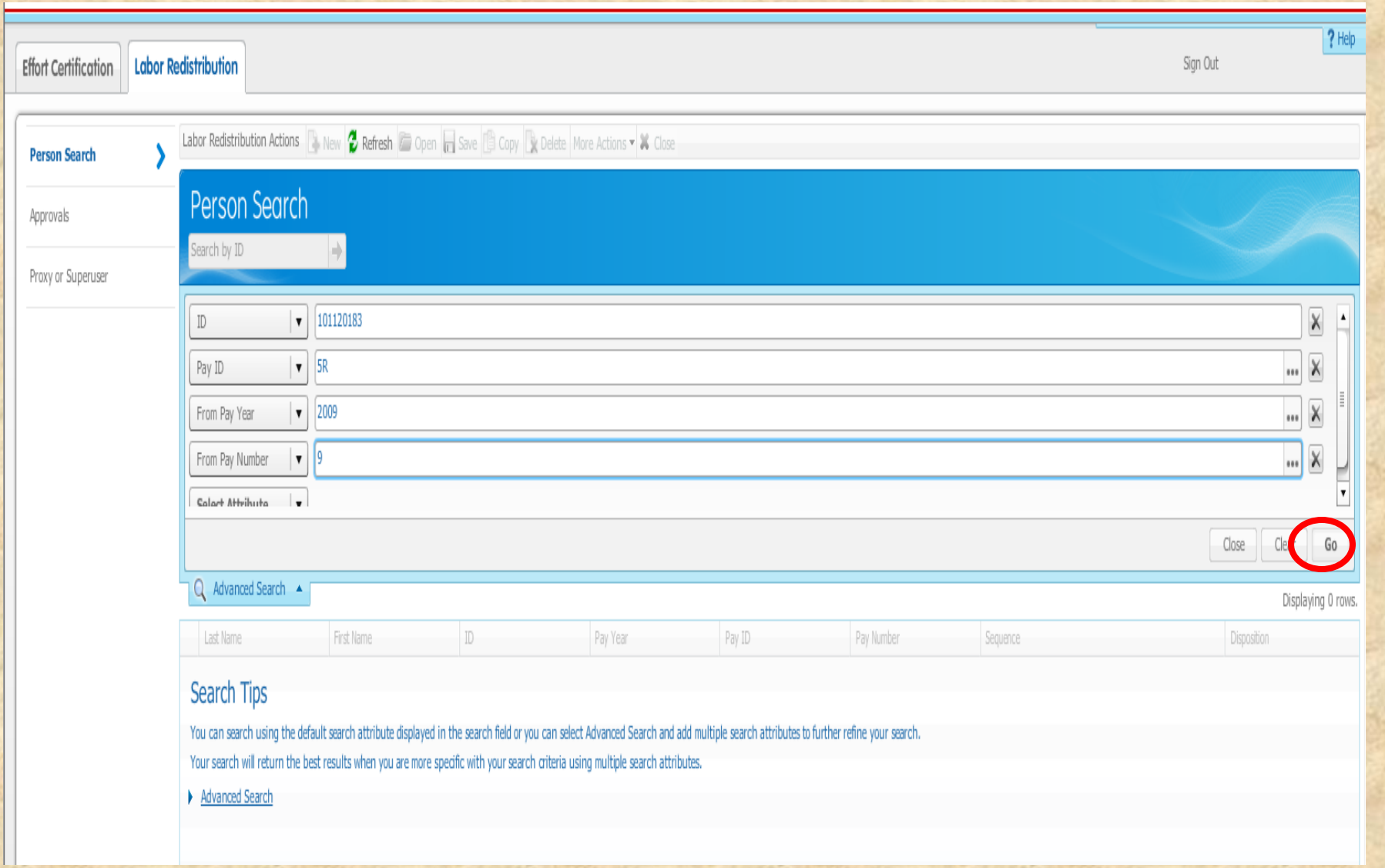

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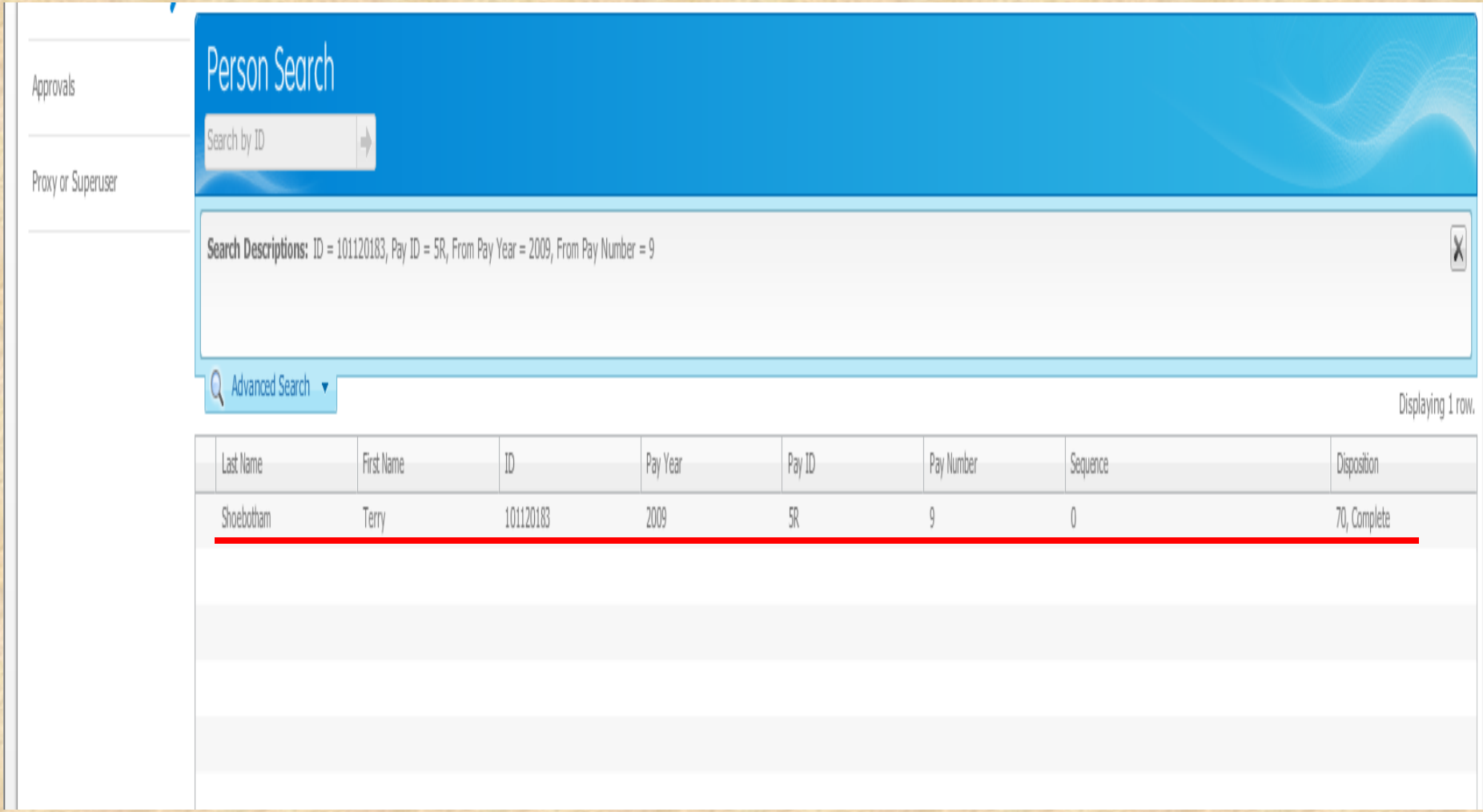

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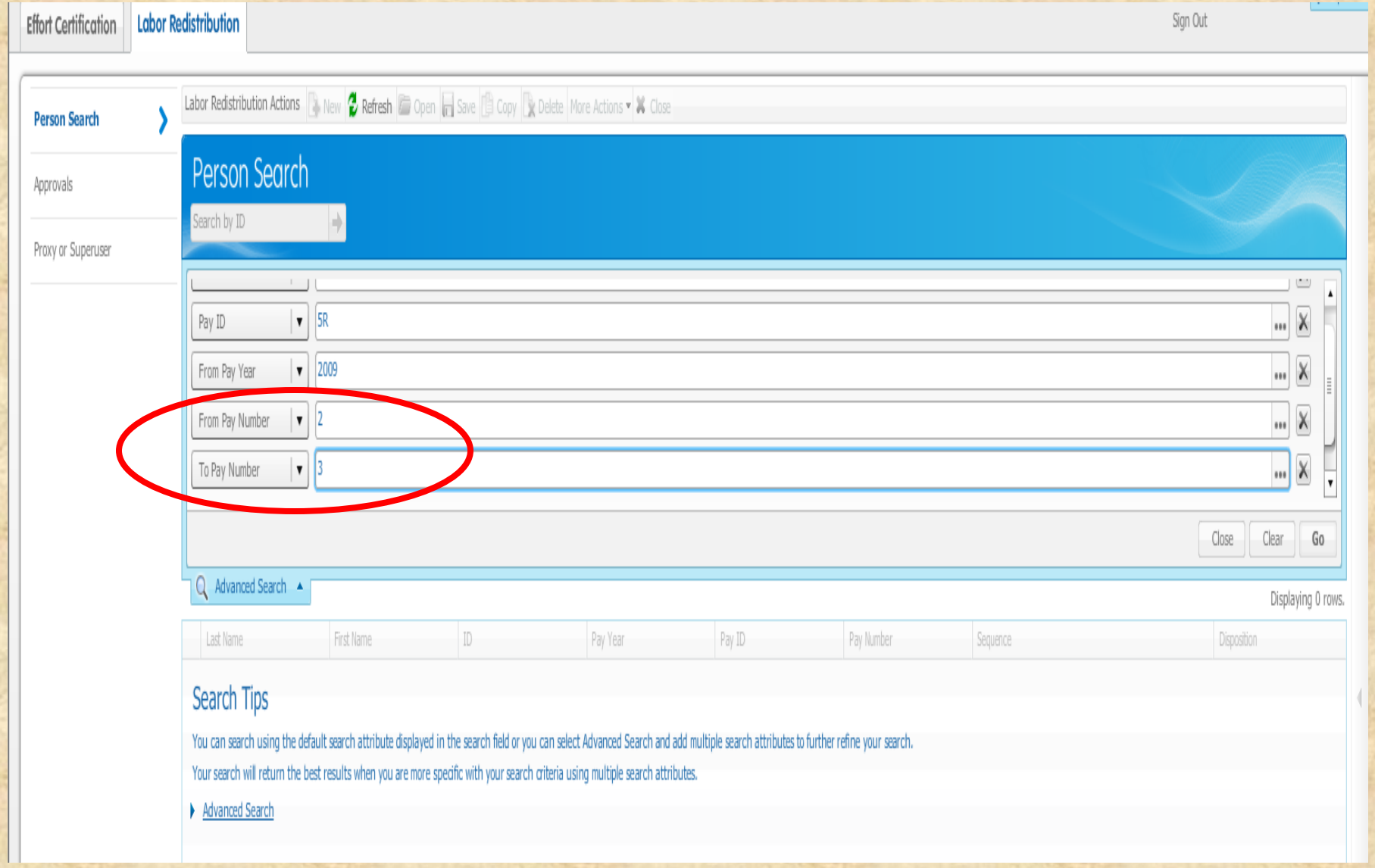

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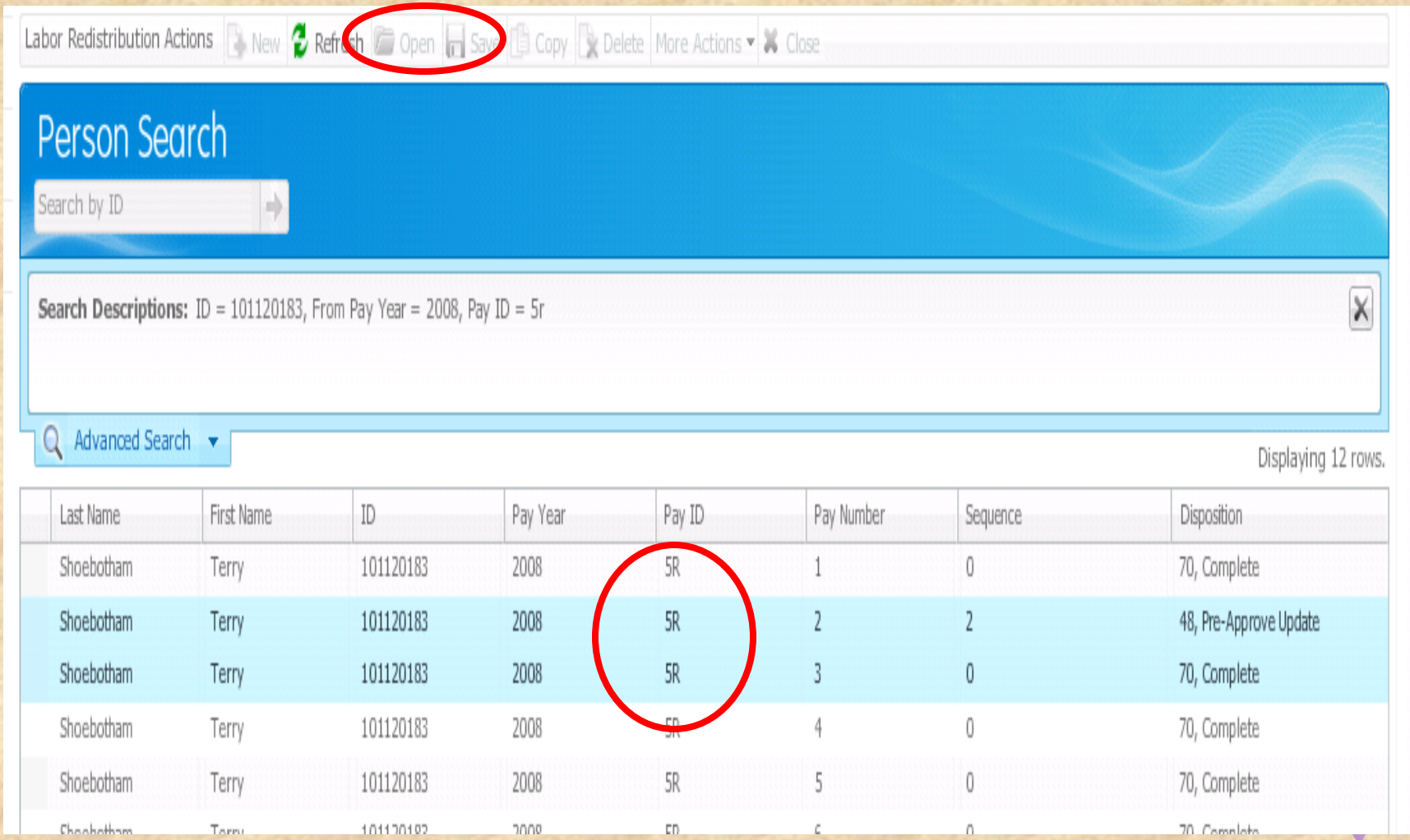

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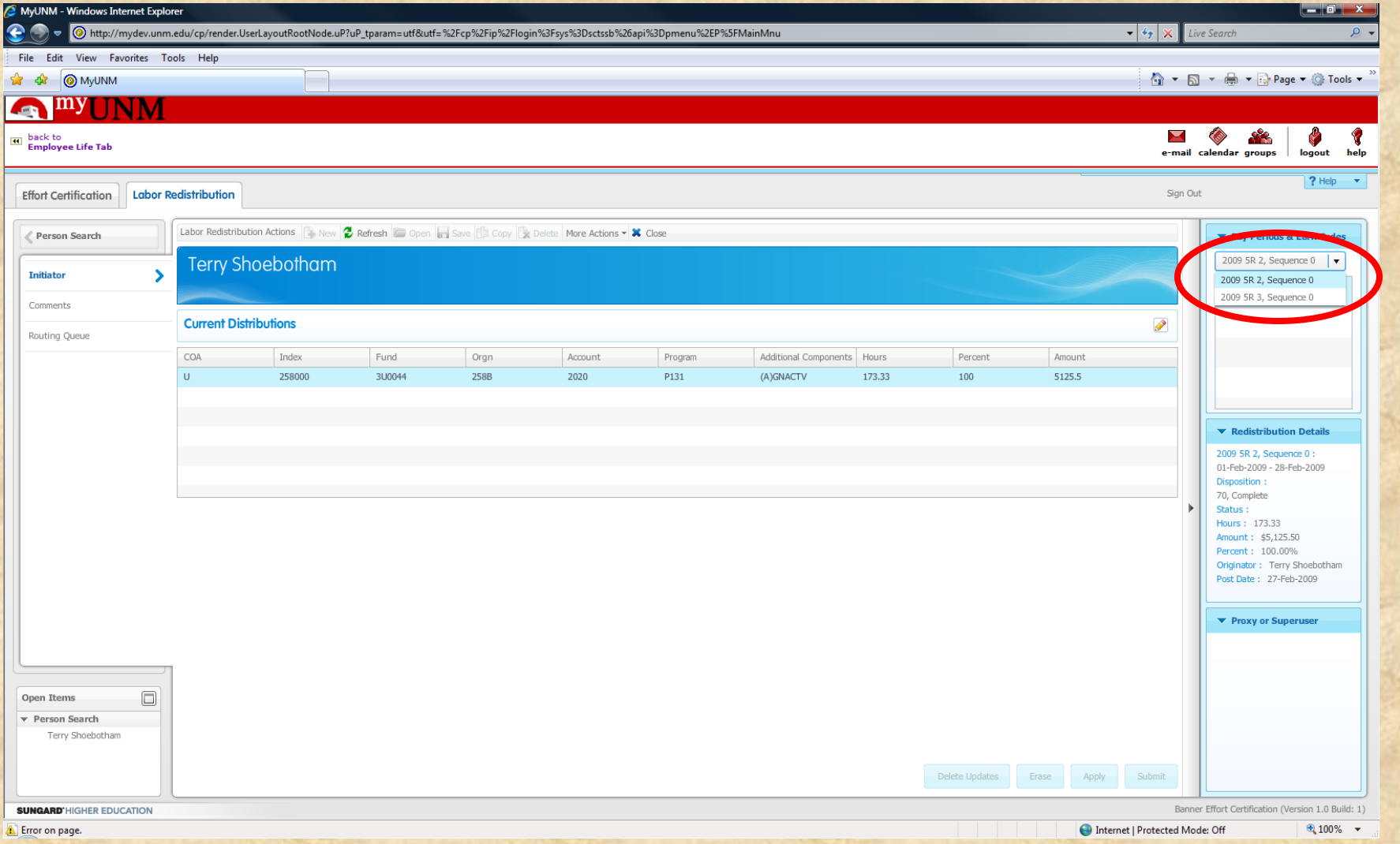

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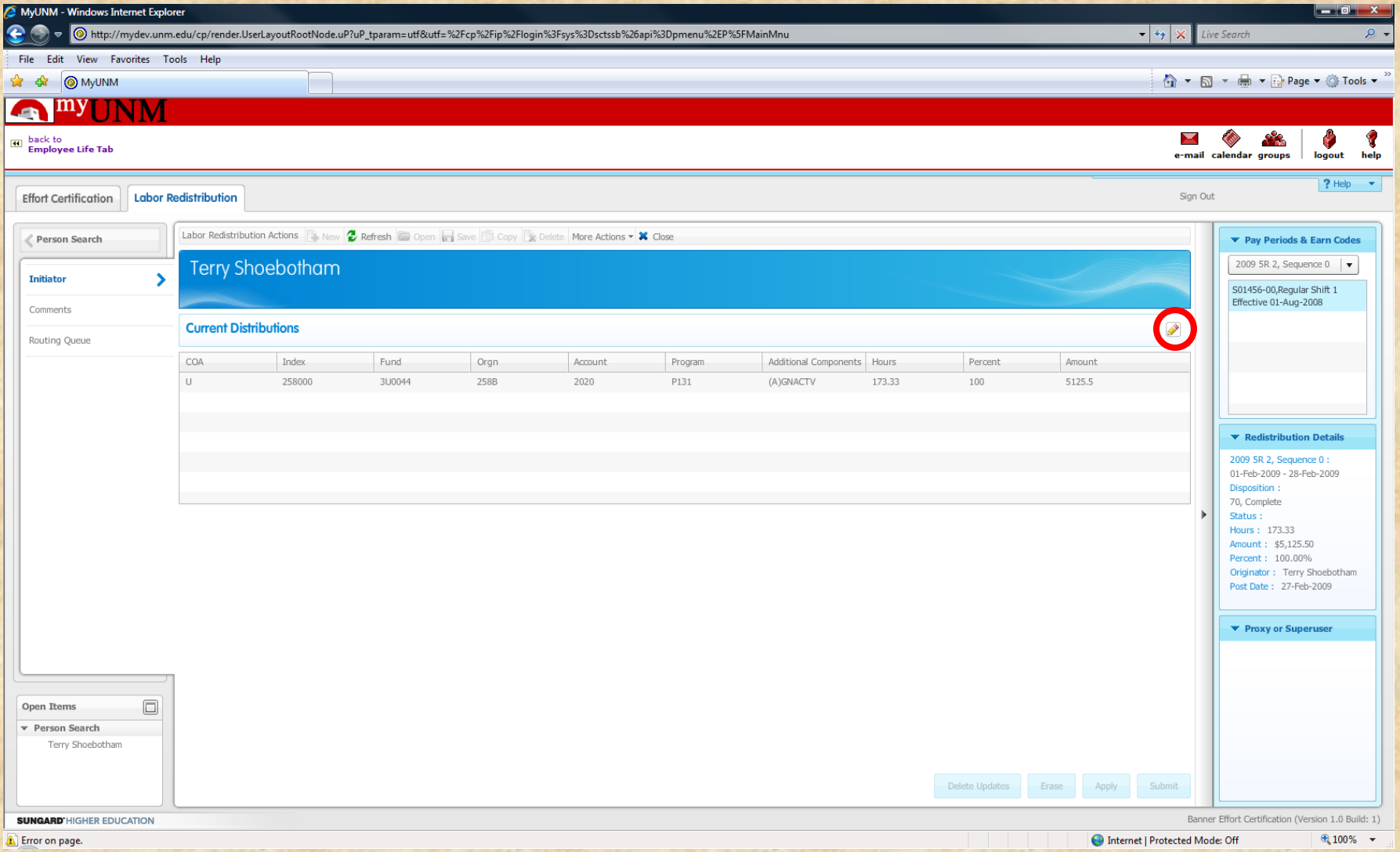

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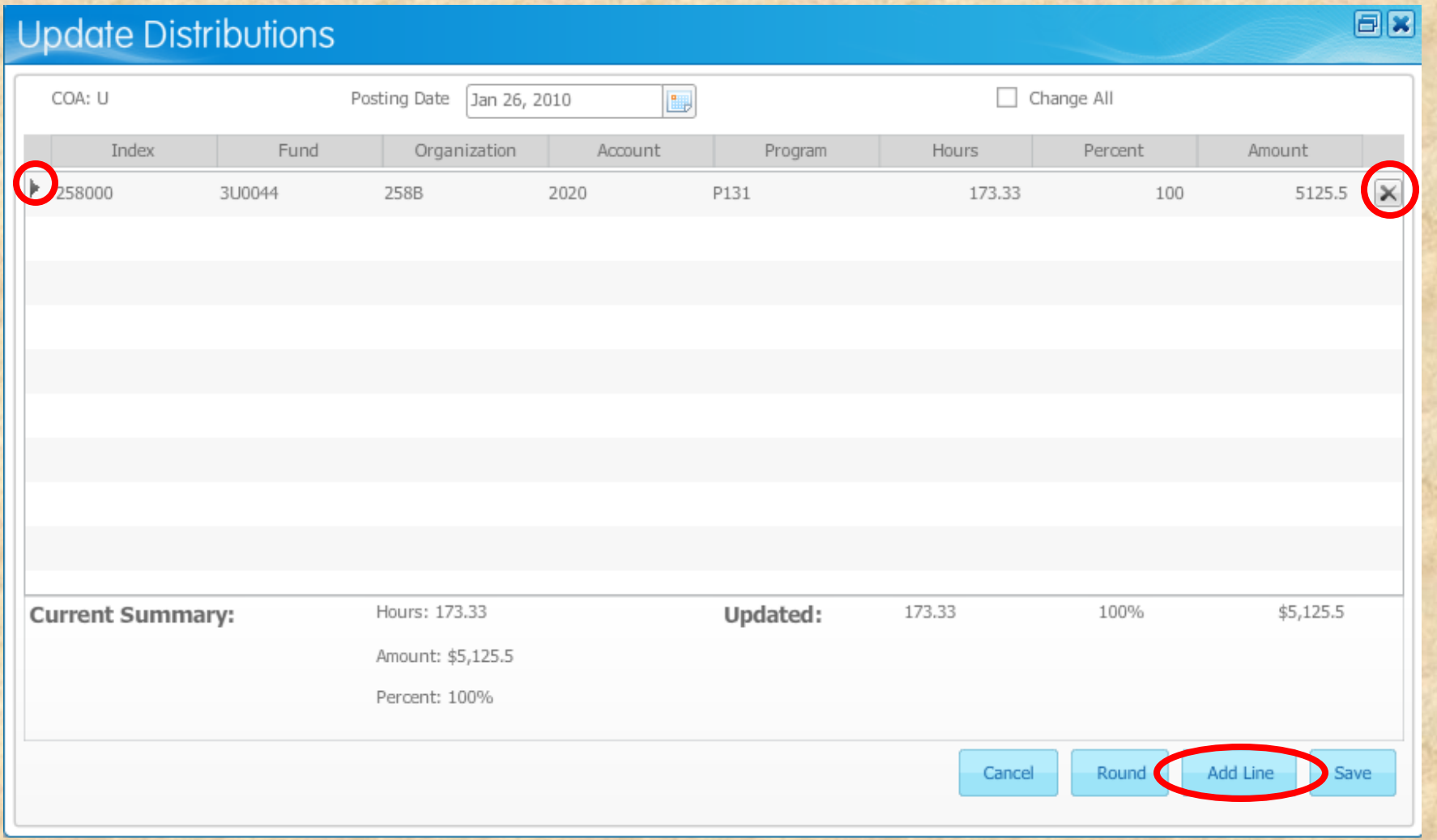

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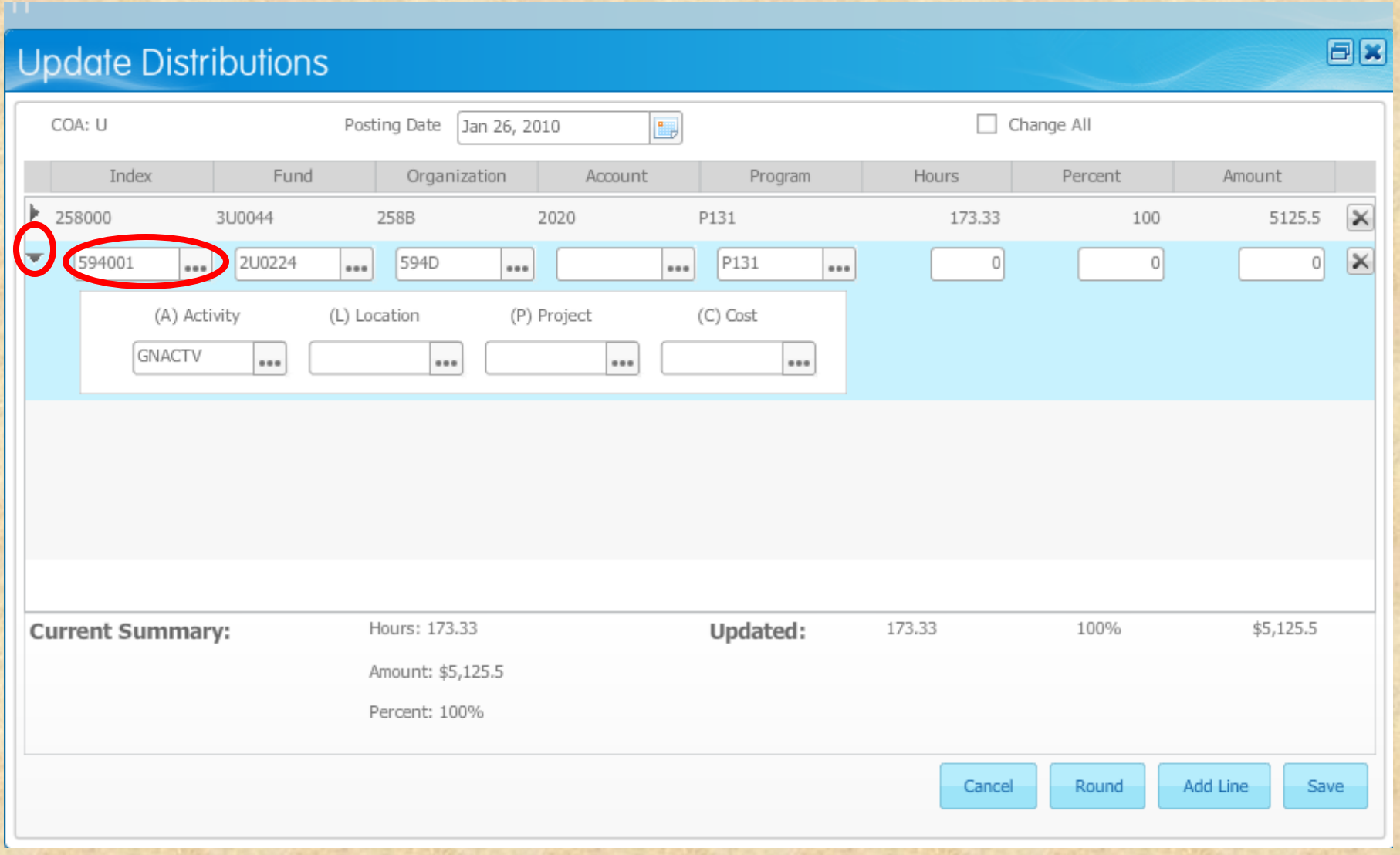

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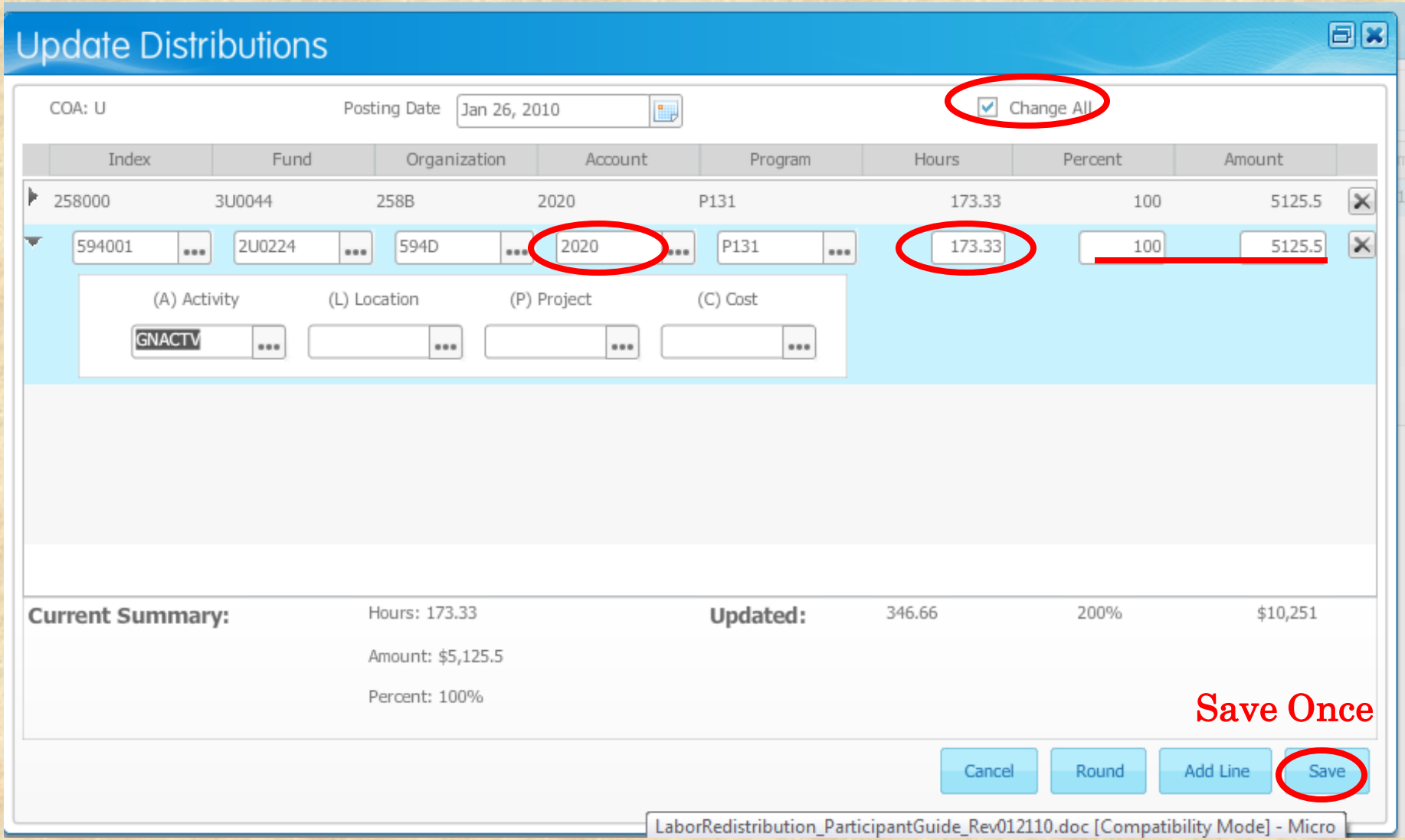

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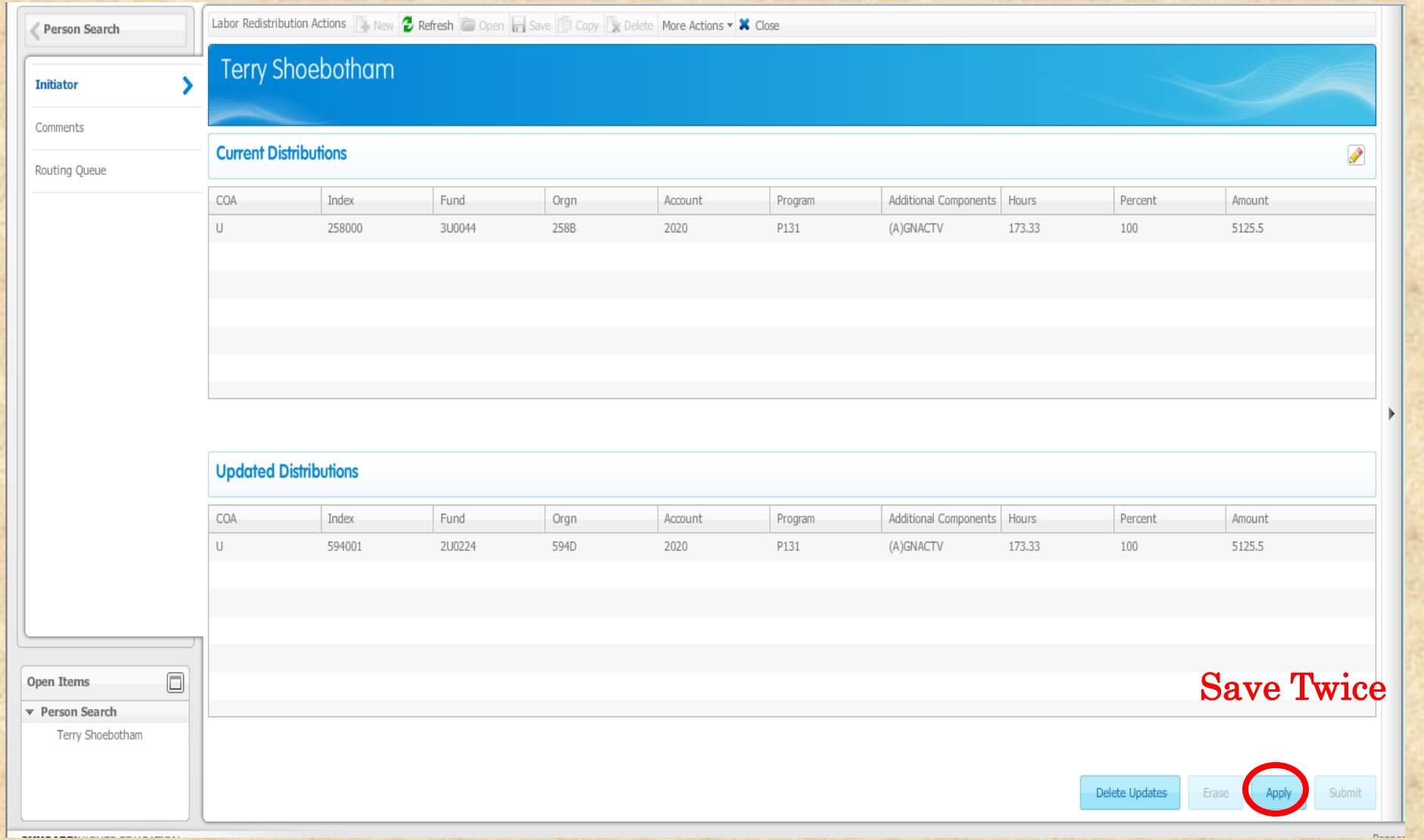

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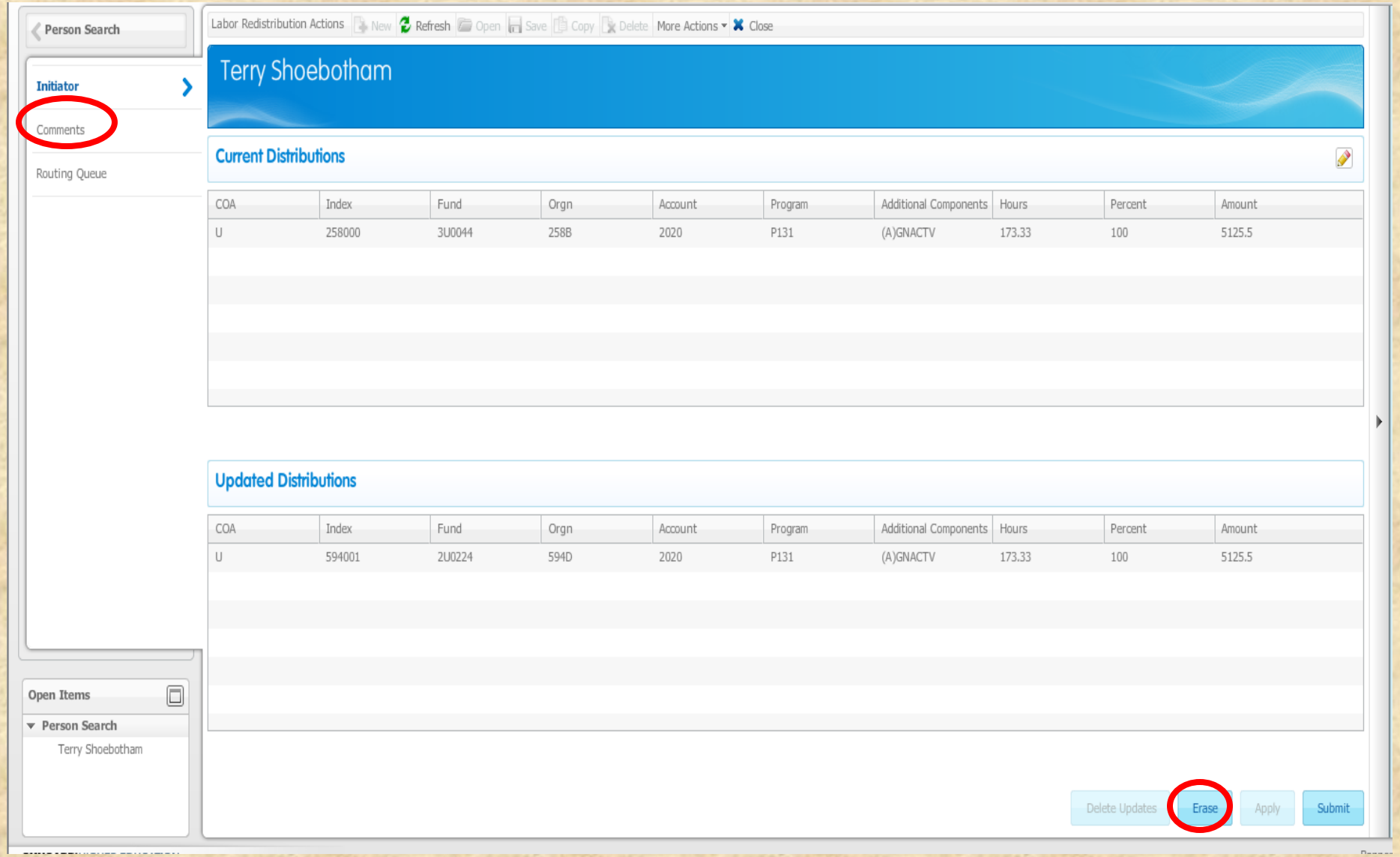

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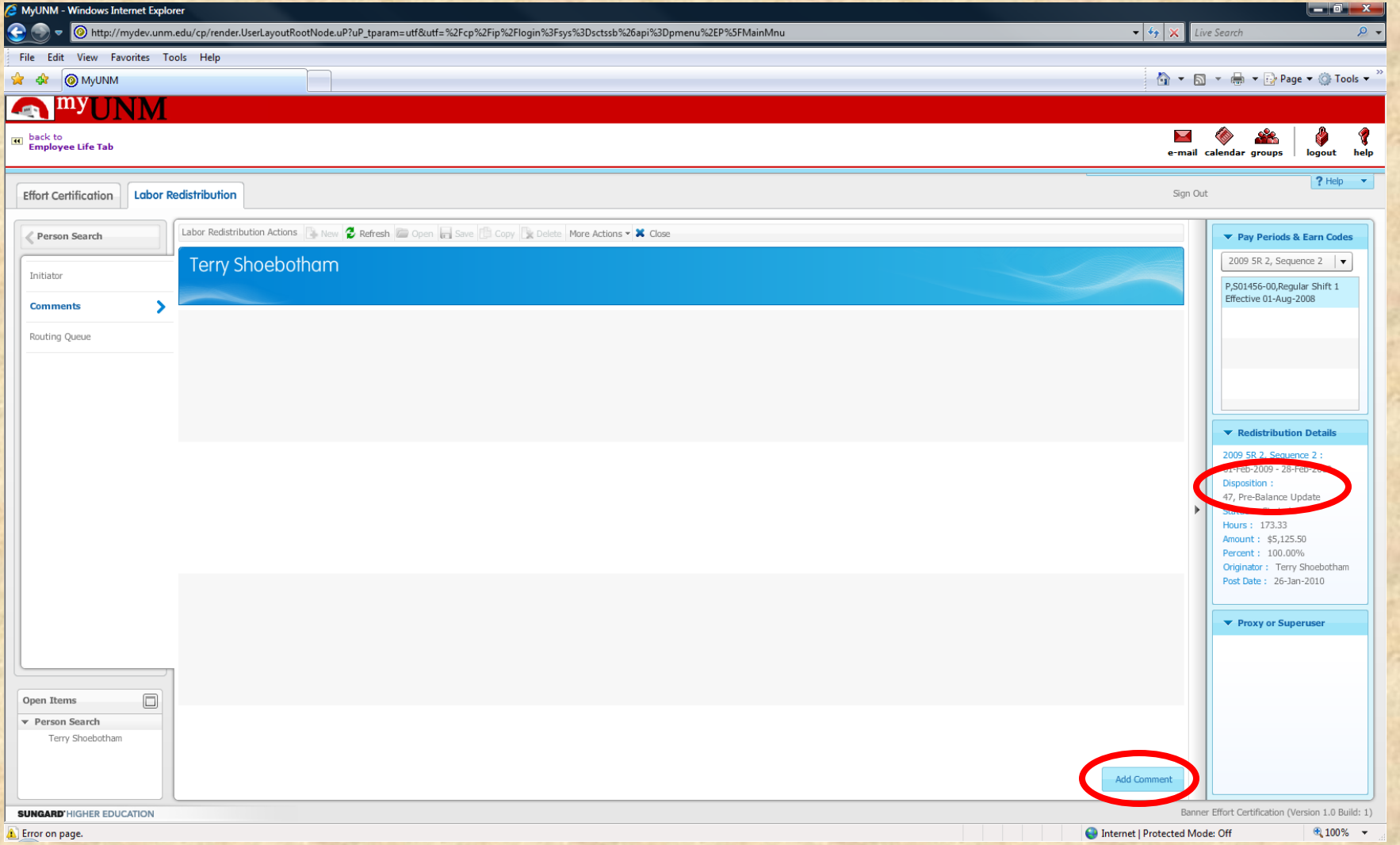

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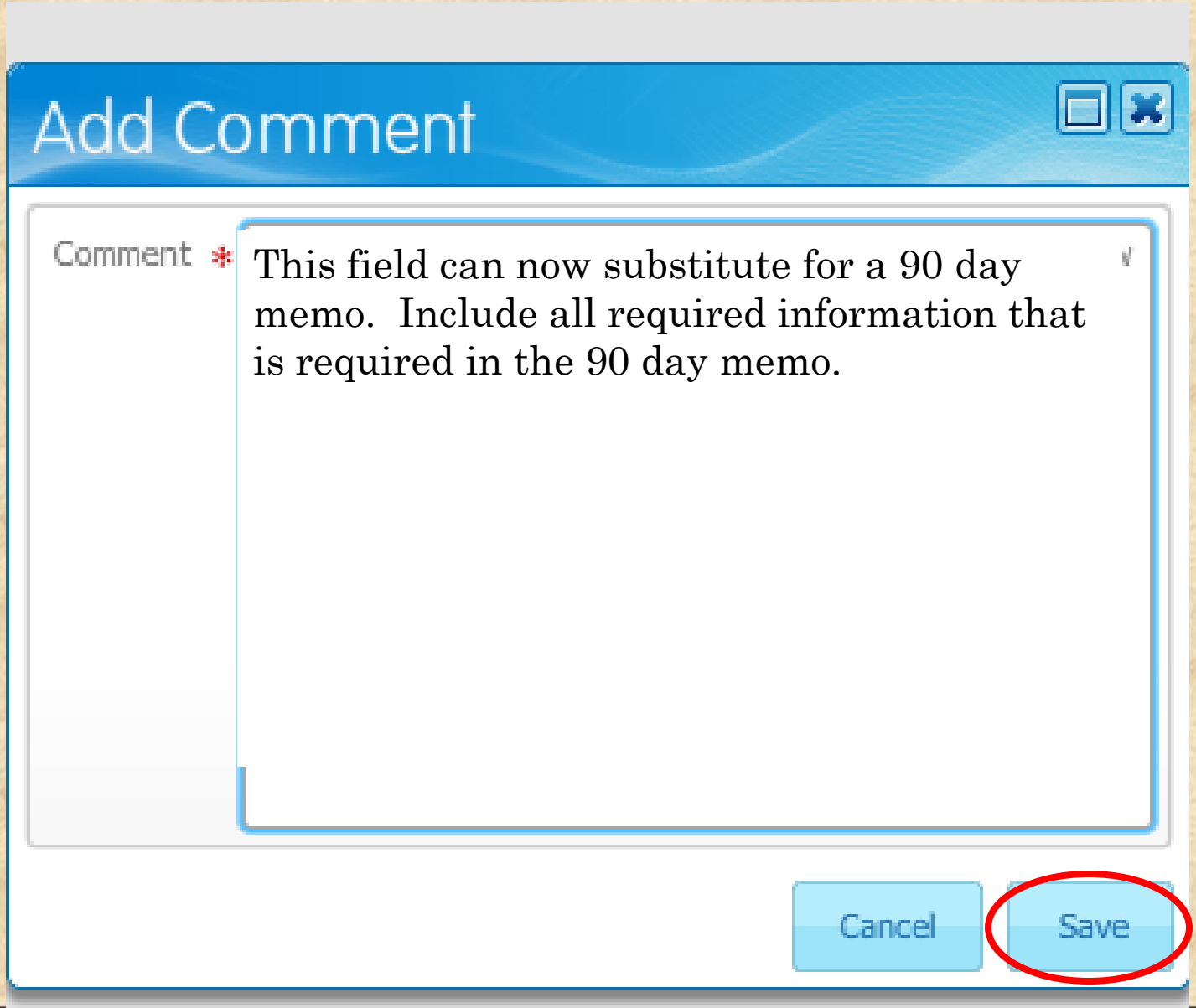

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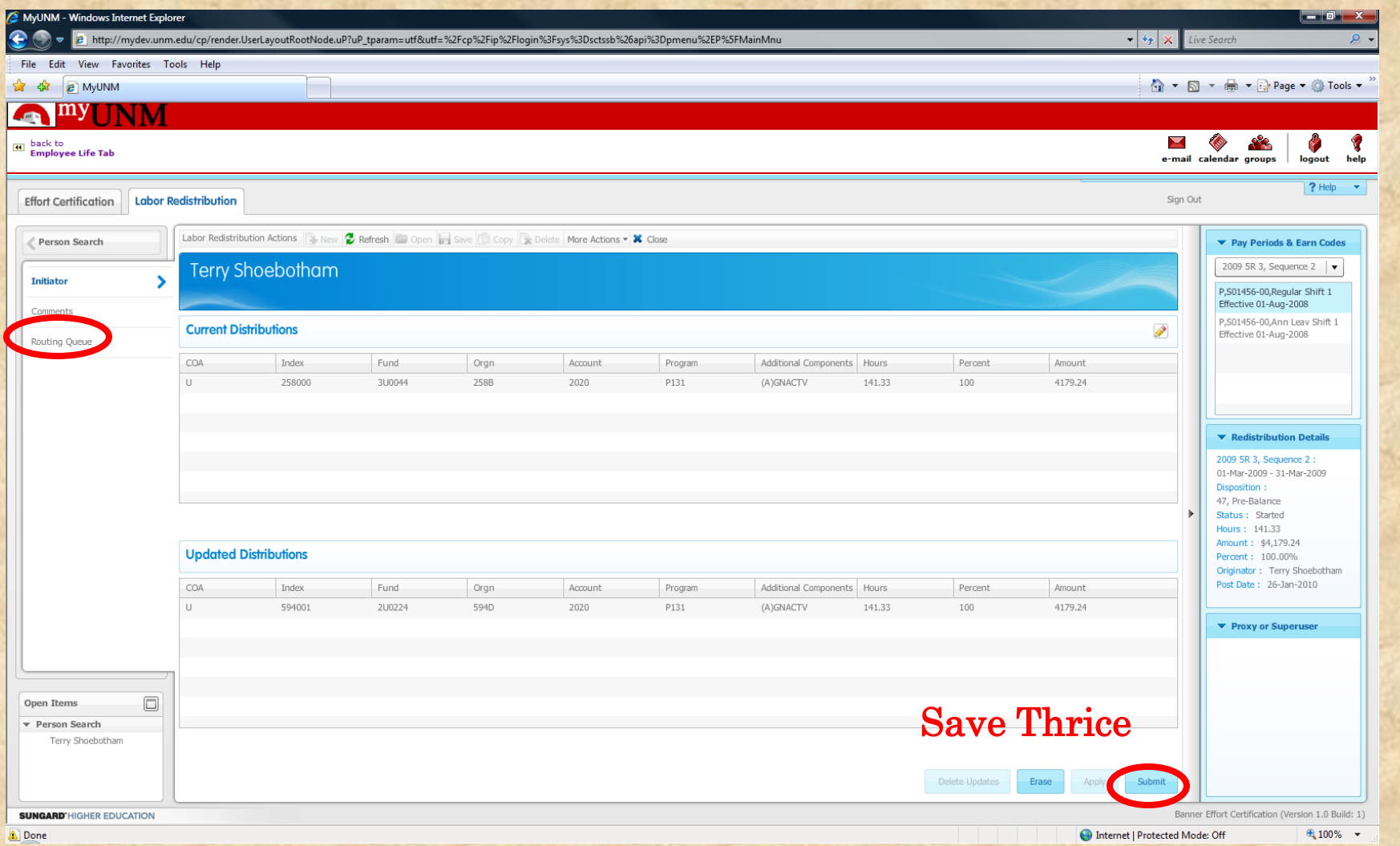

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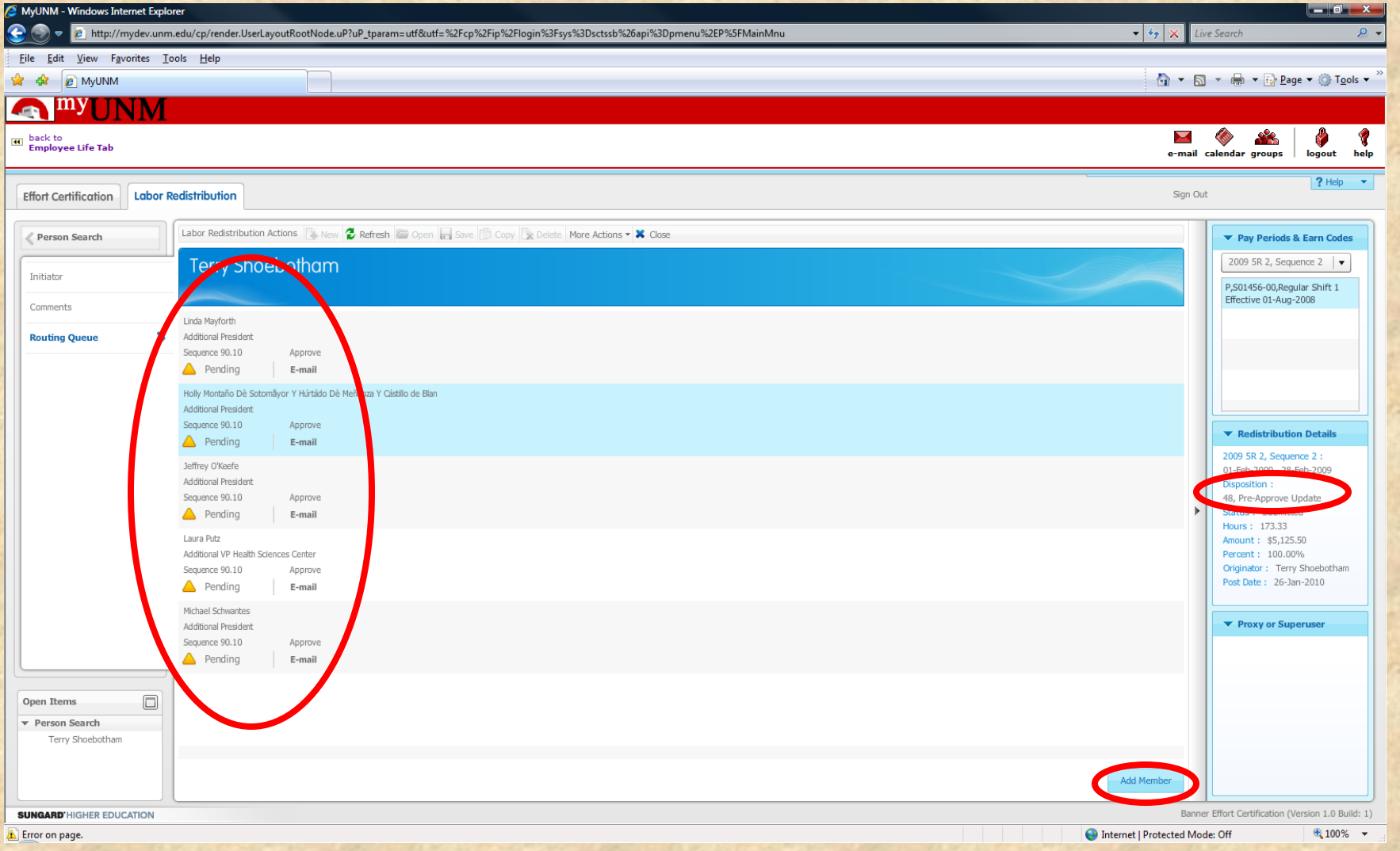
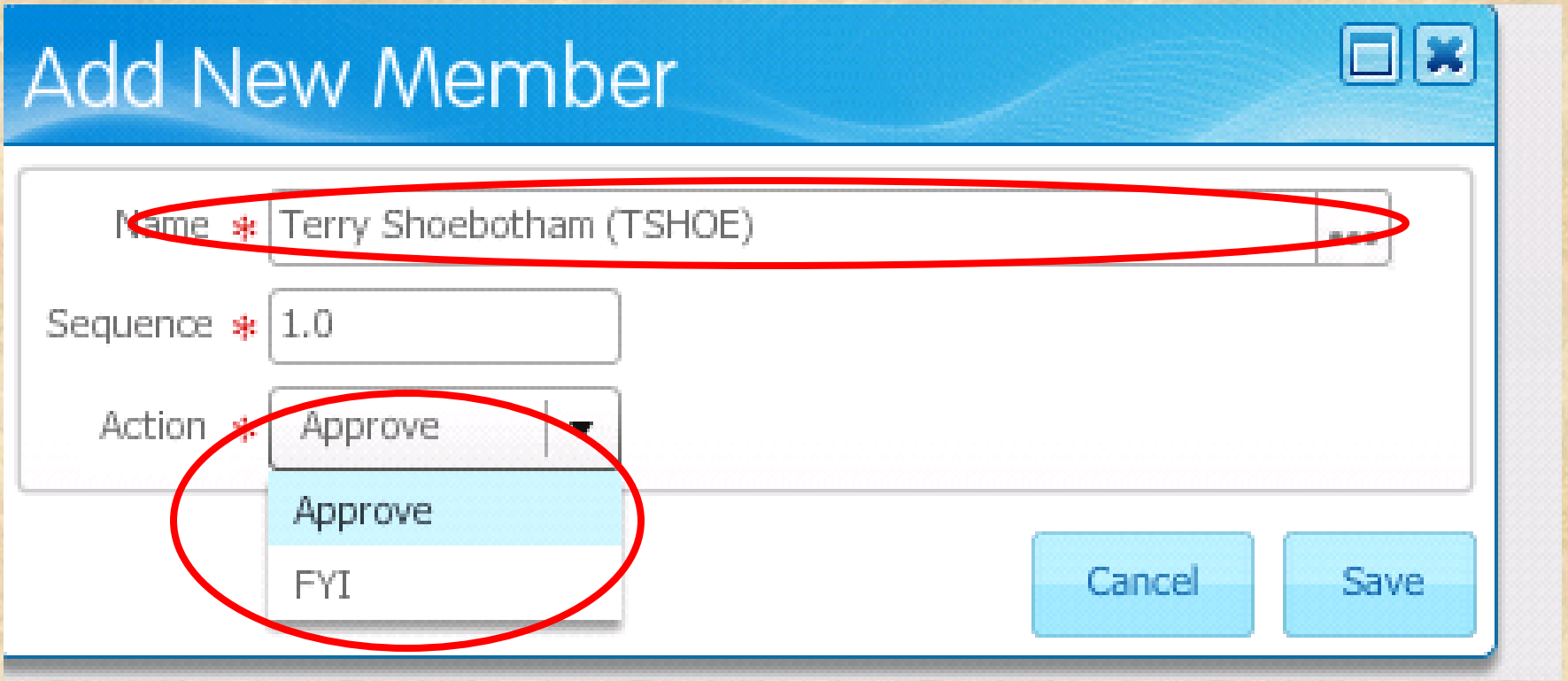


LOBOWEB APPROVAL PROCESS



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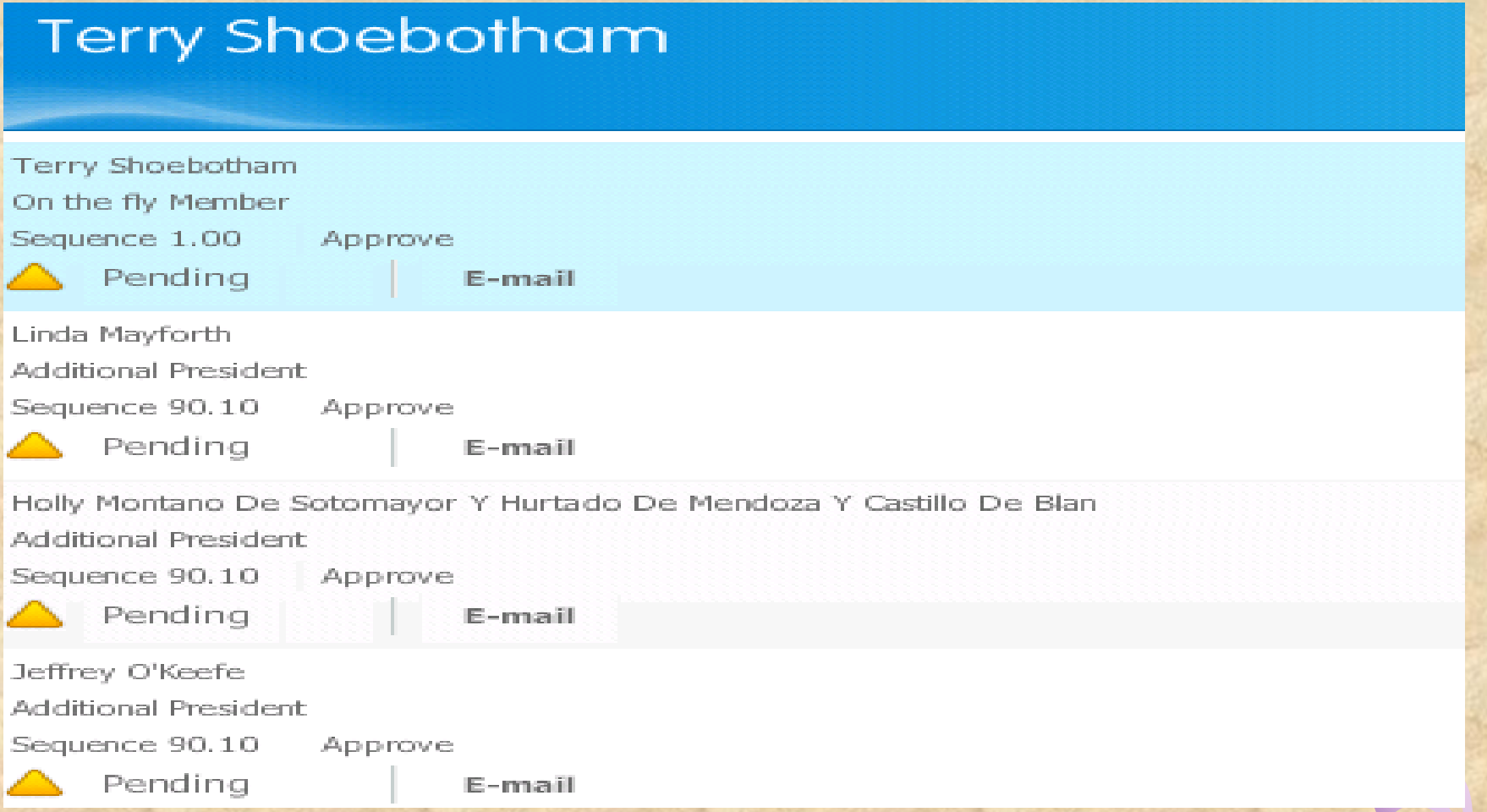
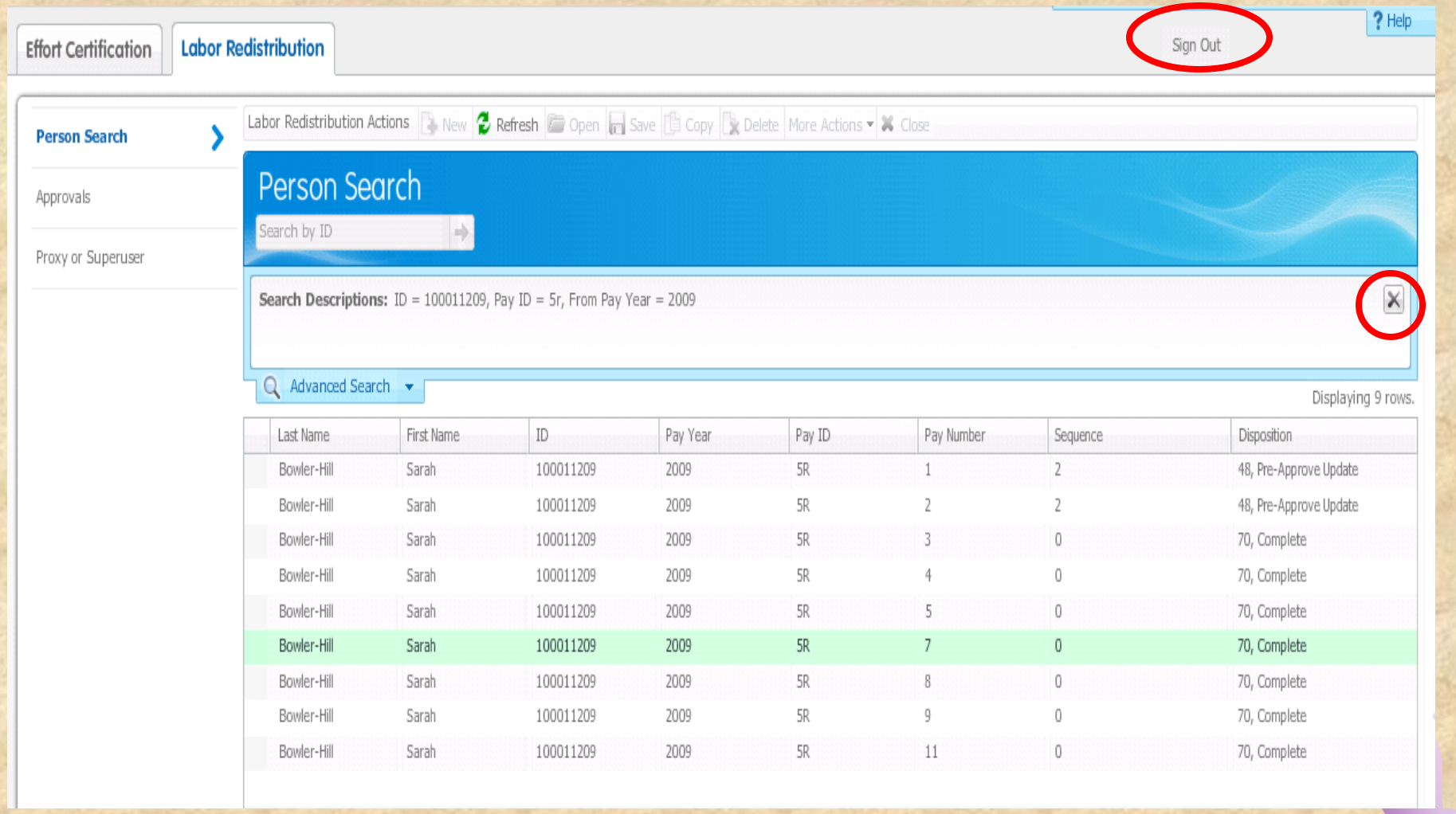


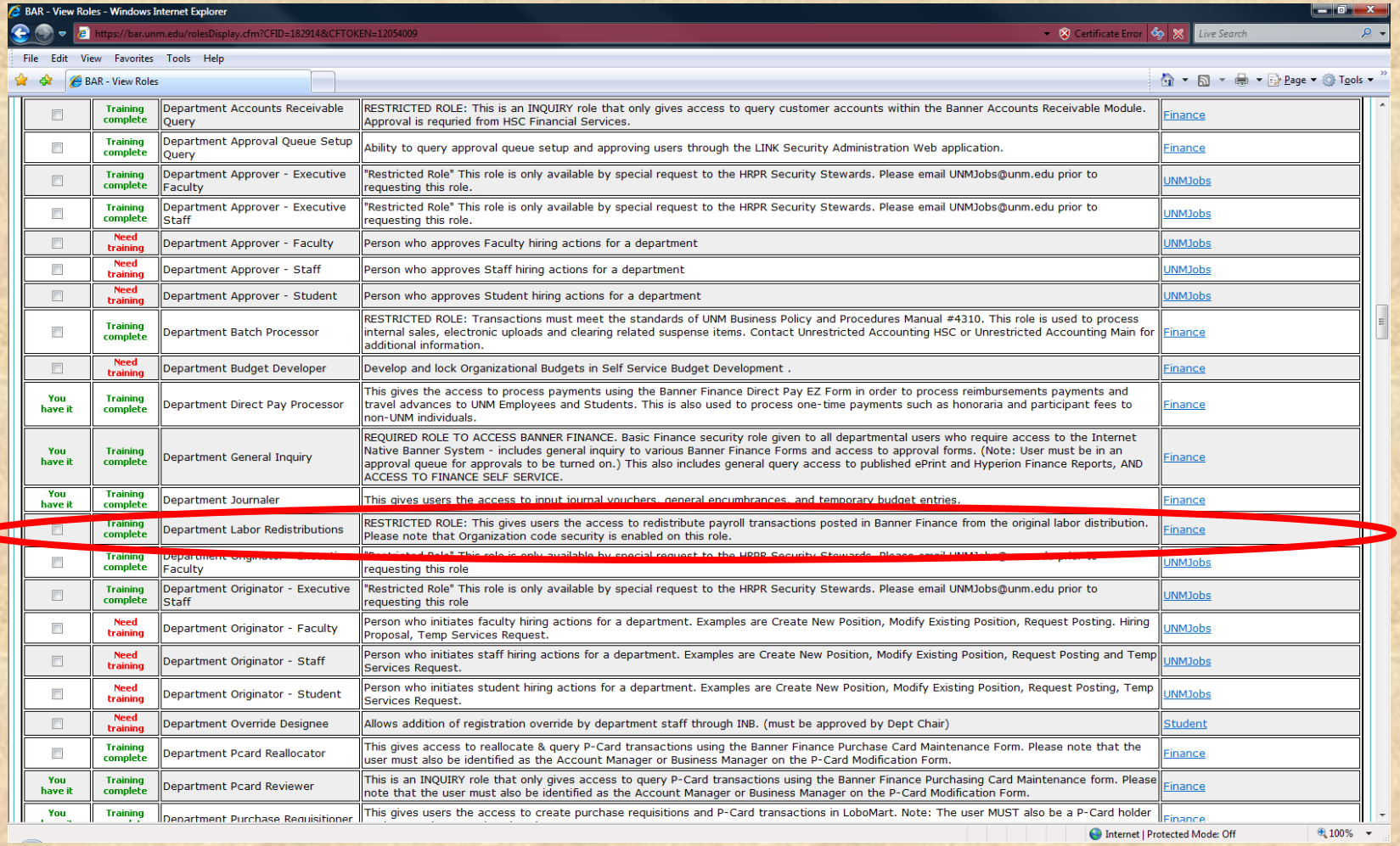

Effort Certification
Labor Redistribution
Sign Out
Help
Person Search
Approvals
Proxy or Superuser
Labor Redistribution Actions
New
Refresh
Open
Save
Copy
Delete
More Actions
Close
Person Search
Search by ID
Search Descriptions: ID = 100011209, Pay ID = 5r, From Pay Year = 2009
Advanced Search
Displaying 9 rows.
Last Name | First Name | ID | Pay Year | Pay ID | Pay Number | Sequence | Disposition
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 1 | 2 | 48, Pre-Approve Update
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 2 | 2 | 48, Pre-Approve Update
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 3 | 0 | 70, Complete
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 4 | 0 | 70, Complete
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 5 | 0 | 70, Complete
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 7 | 0 | 70, Complete
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 8 | 0 | 70, Complete
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 9 | 0 | 70, Complete
Bowler-Hill | Sarah | 100011209 | 2009 | 5R | 11 | 0 | 70, Complete

LOBOWEB APPROVAL PROCESS

- You must have a new security role to approve Labor Redistributions.

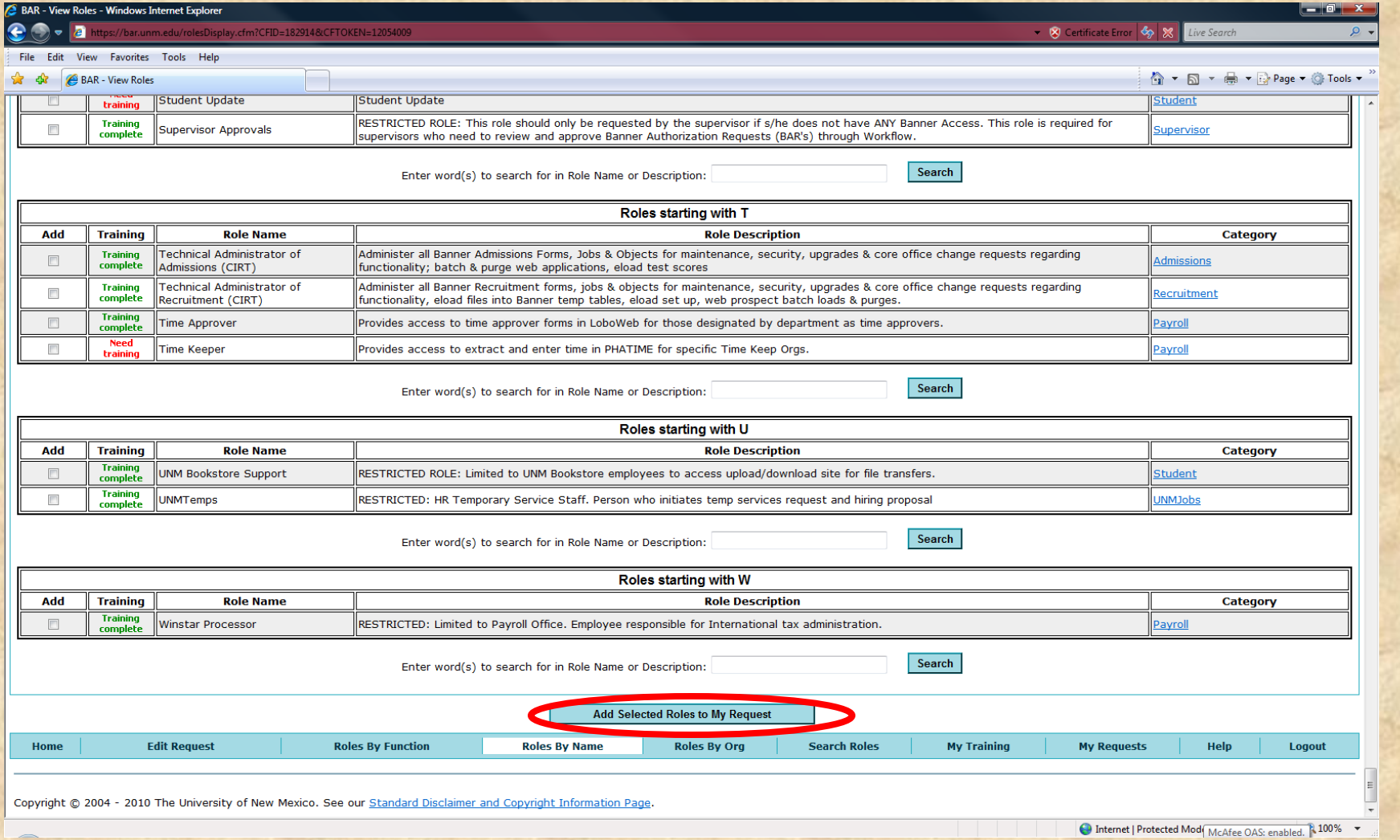
- All Loboweb and Banner (PHAREDS) Labor Redistributions will be approved from the new LoboWeb approval Queue.

LOBOWEB SECURITY



	Training complete	Department Accounts Receivable Query	RESTRICTED ROLE: This is an INQUIRY role that only gives access to query customer accounts within the Banner Accounts Receivable Module. Approval is requried from HSC Financial Services.	Finance
	Training complete	Department Approval Queue Setup Query	Ability to query approval queue setup and approving users through the LINK Security Administration Web application.	Finance
	Training complete	Department Approver - Executive Faculty	"Restricted Role" This role is only available by special request to the HRPR Security Stewards. Please email UNMJobs@unm.edu prior to requesting this role.	UNMJobs
	Training complete	Department Approver - Executive Staff	"Restricted Role" This role is only available by special request to the HRPR Security Stewards. Please email UNMJobs@unm.edu prior to requesting this role.	UNMJobs
	Need training	Department Approver - Faculty	Person who approves Faculty hiring actions for a department	UNMJobs
	Need training	Department Approver - Staff	Person who approves Staff hiring actions for a department	UNMJobs
	Need training	Department Approver - Student	Person who approves Student hiring actions for a department	UNMJobs
	Training complete	Department Batch Processor	RESTRICTED ROLE: Transactions must meet the standards of UNM Business Policy and Procedures Manual #4310. This role is used to process internal sales, electronic uploads and clearing related suspense items. Contact Unrestricted Accounting HSC or Unrestricted Accounting Main for additional information.	Finance
	Need training	Department Budget Developer	Develop and lock Organizational Budgets in Self Service Budget Development .	Finance
You have it	Training complete	Department Direct Pay Processor	This gives the access to process payments using the Banner Finance Direct Pay EZ Form in order to process reimbursements payments and travel advances to UNM Employees and Students. This is also used to process one-time payments such as honoraria and participant fees to non-UNM individuals.	Finance
You have it	Training complete	Department General Inquiry	REQUIRED ROLE TO ACCESS BANNER FINANCE. Basic Finance security role given to all departmental users who require access to the Internet Native Banner System - includes general inquiry to various Banner Finance Forms and access to approval forms. (Note: User must be in an approval queue for approvals to be turned on.) This also includes general query access to published ePrint and Hyperion Finance Reports, AND ACCESS TO FINANCE SELF SERVICE.	Finance
You have it	Training complete	Department Journaler	This gives users the access to input journal vouchers, general encumbrances, and temporary budget entries.	Finance
	Training complete	Department Labor Redistributions	RESTRICTED ROLE: This gives users the access to redistribute payroll transactions posted in Banner Finance from the original labor distribution. Please note that Organization code security is enabled on this role.	Finance
	Training complete	Faculty	requesting this role	UNMJobs
	Training complete	Department Originator - Executive Staff	"Restricted Role" This role is only available by special request to the HRPR Security Stewards. Please email UNMJobs@unm.edu prior to requesting this role	UNMJobs
	Need training	Department Originator - Faculty	Person who initiates faculty hiring actions for a department. Examples are Create New Position, Modify Existing Position, Request Posting. Hiring Proposal, Temp Services Request.	UNMJobs
	Need training	Department Originator - Staff	Person who initiates staff hiring actions for a department. Examples are Create New Position, Modify Existing Position, Request Posting and Temp Services Request.	UNMJobs
	Need training	Department Originator - Student	Person who initiates student hiring actions for a department. Examples are Create New Position, Modify Existing Position, Request Posting, Temp Services Request.	UNMJobs
	Need training	Department Override Designee	Allows addition of registration override by department staff through INB. (must be approved by Dept Chair)	Student
	Training complete	Department Pcard Reallocator	This gives access to reallocate & query P-Card transactions using the Banner Finance Purchase Card Maintenance Form. Please note that the user must also be identified as the Account Manager or Business Manager on the P-Card Modification Form.	Finance
You have it	Training complete	Department Pcard Reviewer	This is an INQUIRY role that only gives access to query P-Card transactions using the Banner Finance Purchasing Card Maintenance form. Please note that the user must also be identified as the Account Manager or Business Manager on the P-Card Modification Form.	Finance
You	Training	Department Purchase Requisitioner	This gives users the access to create purchase requisitions and P-Card transactions in LoboMart. Note: The user MUST also be a P-Card holder	Finance

LOBOWEB SECURITY



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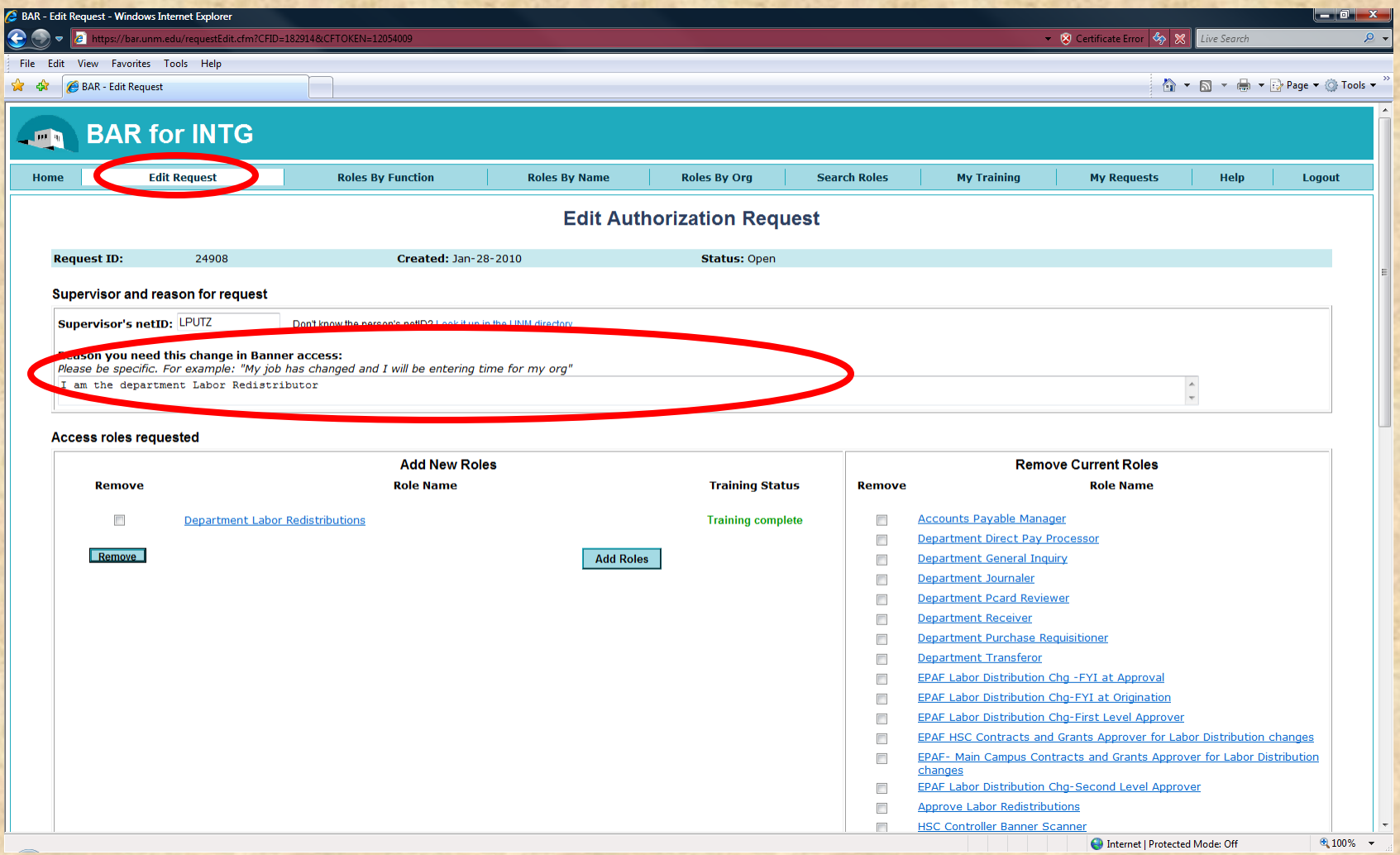

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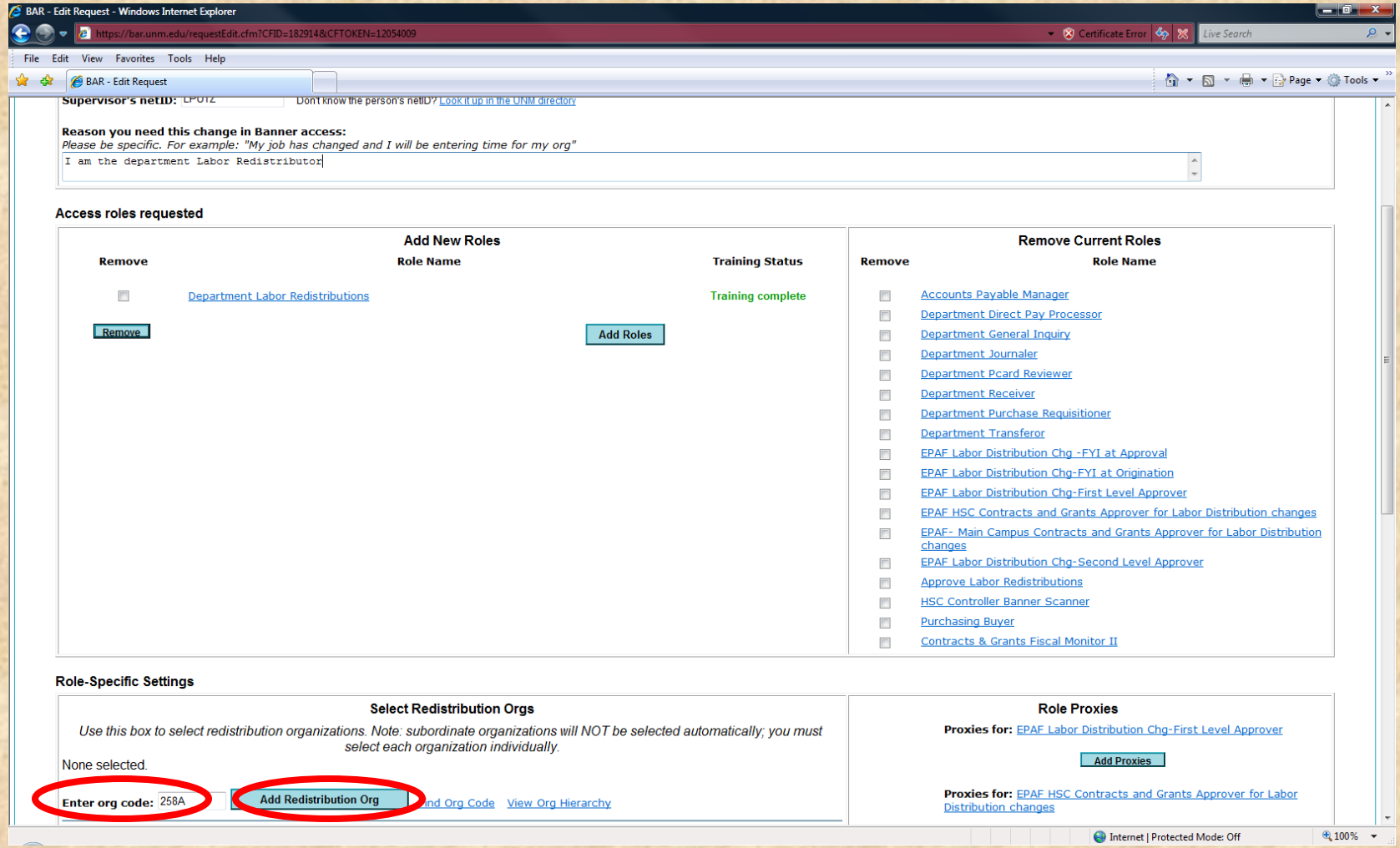

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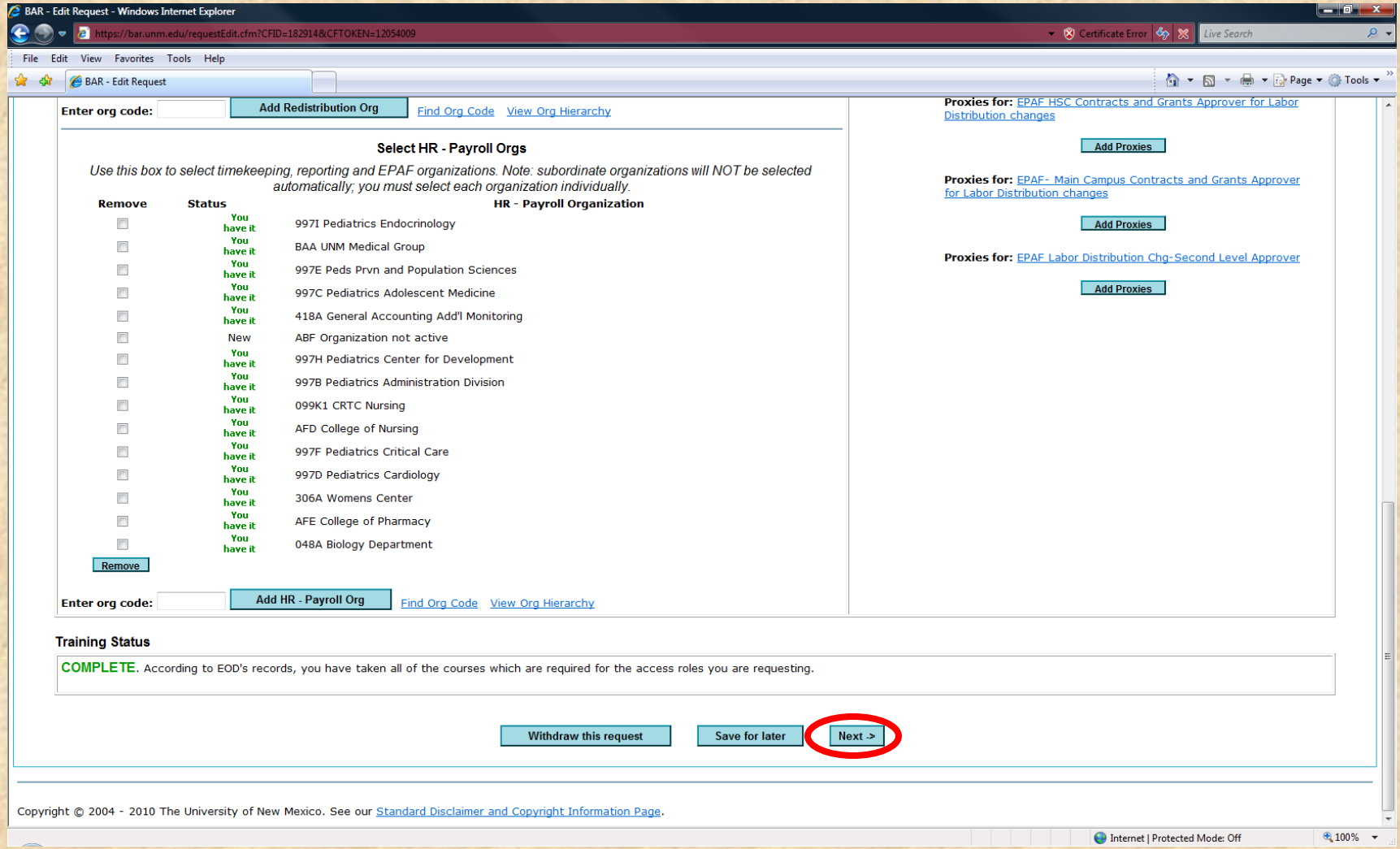

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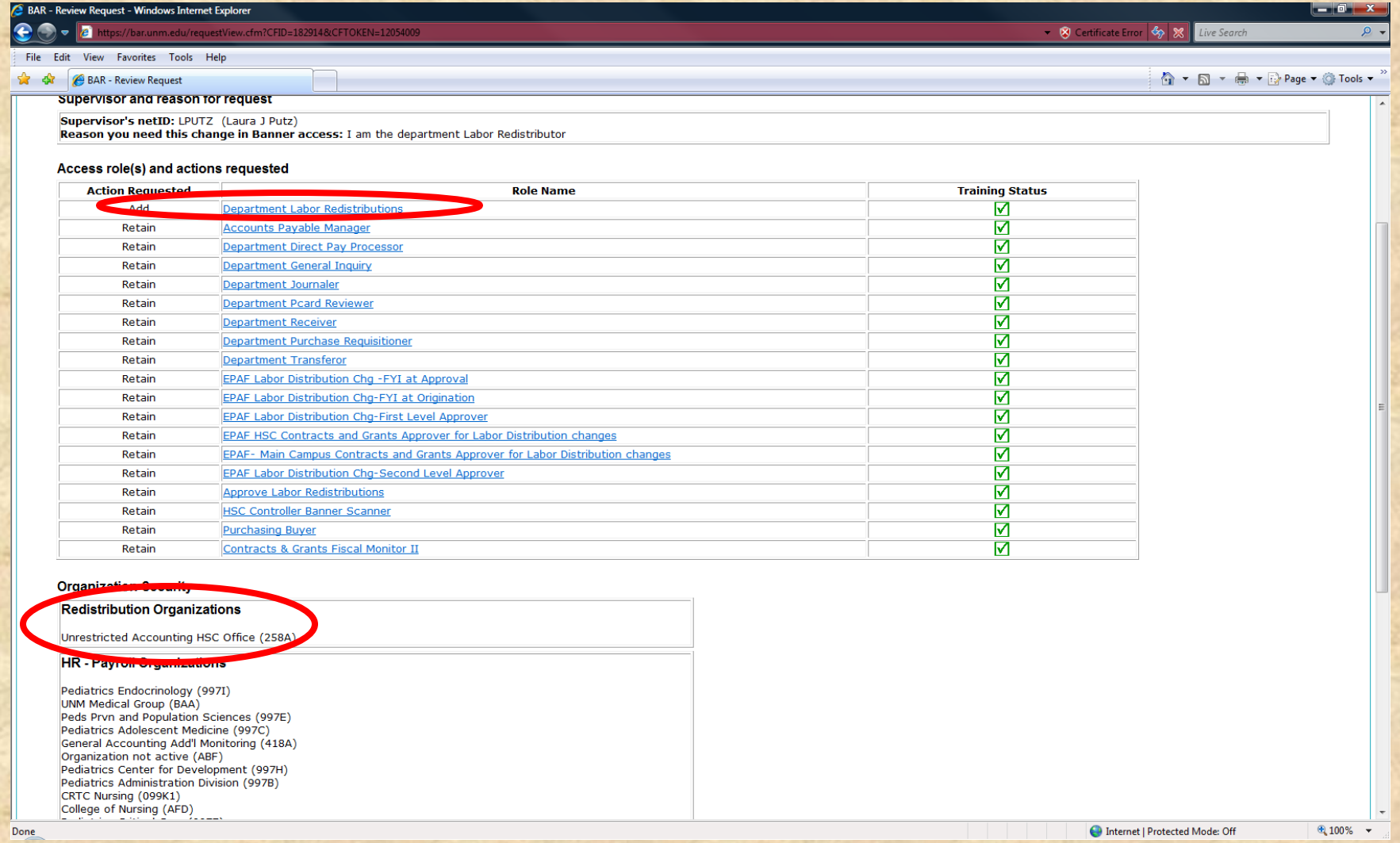

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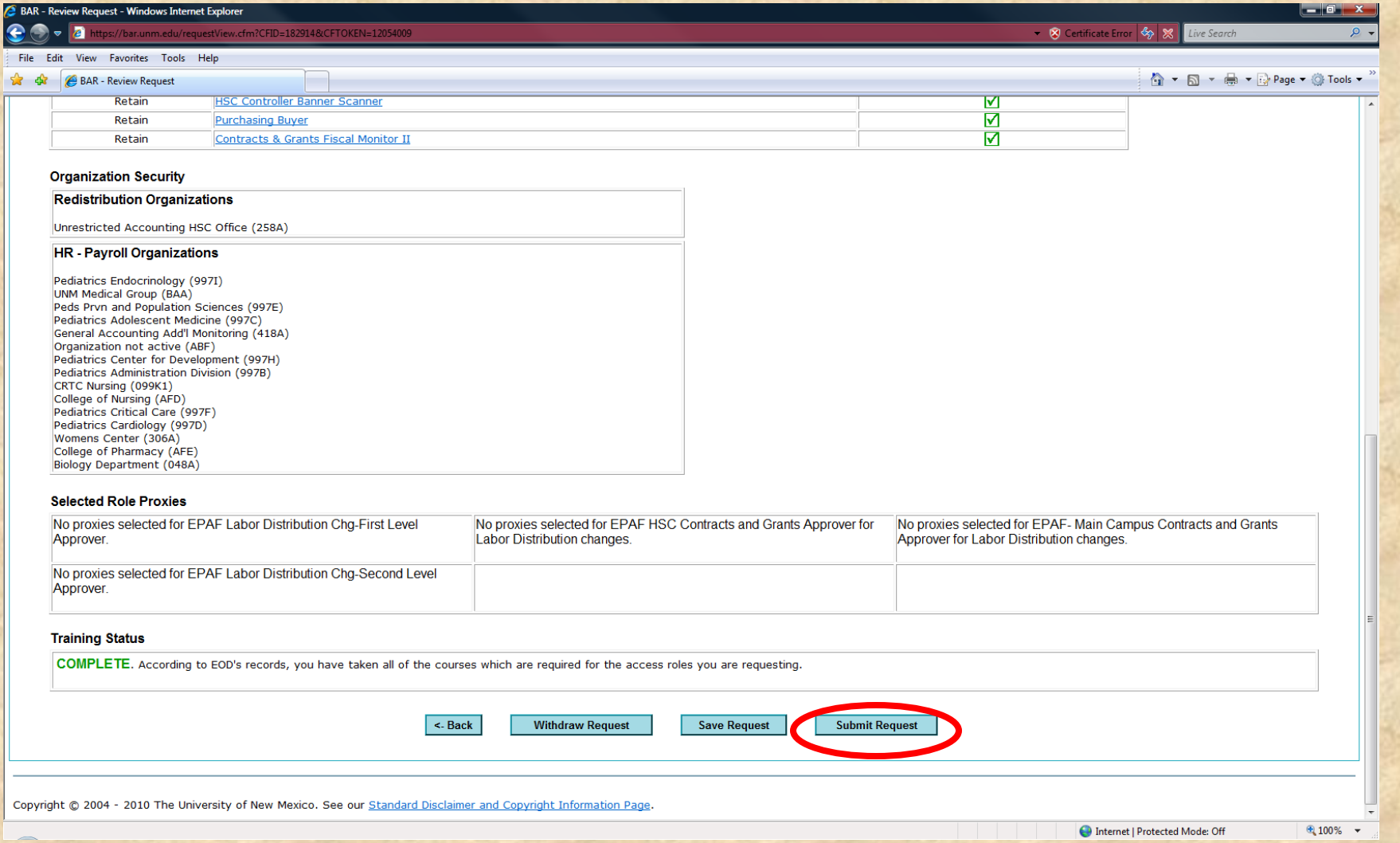

QUESTIONS?