



## BANNER BUDGET BUDGET DEVELOPMENT



### BD-106 Organizational Lock

Date Issued/Rev: 3/02/2012

**General Description:** This procedure explains how to lock and unlock organizations within Budget Development. Organizational locks at higher organizational levels prevent users with subordinate organizational security from making changes to indices within the “Create Budget Worksheet” option. The locking process has a cascading effect; when you lock/unlock an organization all organizations beneath it become locked/unlocked as well. Also, you cannot lock or unlock the highest organization for which you have access.

**Responsible Manager:** Office of Planning, Budget and Analysis (OPBA)  
HSC Budget Office

#### Important Information

- The FY12-13 Budget Planner lock dates are listed in The Budget Development Calendar. This calendar is posted on the OPBA web site <http://www.unm.edu~budget/> .
- Organization hierarchy information can be found on the E-Print report FGRORGH, Organization Hierarchy Report.

#### Things to Remember

##### Things to Remember

Locking = Approved

Unlocking = Unapproved

**You cannot lock or unlock the highest organization for which you have access. For example, if David has access to ABC – Level 3 organization he can:**

- update all indices under ABC in “Create Budget Worksheet”
- lock/unlock all ABCs **subordinate orgs.**
- update indices without unlocking the org only if ABC org is unlocked.**
- however, he cannot lock/unlock ABC org.**

**An asterisk (\*) next to a locked organization status indicates that a subordinate organization is unlocked.**

**Locks/unlocks cascade downward.**

#### Lock or Unlock an Organization

1. Logon to my.unm.edu
2. Select the “Employee Life” tab
3. Under Banner Applications, click on “LoboWeb” or under the LoboWeb For Employees click on “LoboWeb” or click on “Enter LoboWeb”

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Home Campus Life Library UNM E-Mail **Employee Life** Finance new

**Human Resources**

- General Information
  - HR Main Page
  - ePAN
  - Salary Structure Table
  - Standard Timesheet for Staff (PDF)
  - Standard Timesheet for Staff (Excel)
- Career Development
  - Career Development Main Page
  - Education and Training
  - Job Enrichment
  - Career Ladders
- Staff Resources
  - HR Consulting Services
  - Wellness (Employee Health Promotion Program - EHPP)
  - Training (Employee and Organizational Development - EOD)
  - Office of Equal Opportunity (OEO)
  - Dispute Resolution
  - Counseling Assistance and Referral Services (CARS)

**LoboWeb For Employees**

**LoboWeb Unavailable 3/06/10 8am-12noon**  
Due to planned maintenance LoboWeb will be unavailable 3/06/10 8am-12noon. For additional Information please refer to the [italerts board](#).

**LOBOWEB Unavailable 2/27/10 7am-9am**  
Due to unplanned maintenance LoboWeb will be unavailable 2/27/10 7am-9am. For additional Information please refer to the [ITAlerts board](#)

**The University of New Mexico**  
**LoboWeb**

**What is LoboWeb?**  
LoboWeb is the place for employees to view/update personal information, benefits and deductions, pay information, tax forms and more.

**Enter LoboWeb**

Due to scheduled backups, LoboWeb is unavailable Saturday 7:00 pm - 9:30 pm.

**Banner Applications**

Transaction and Real-time Query Systems

- Internet Native Banner
- LoboWeb**
- LoboMail
- UNMJobs
- Workflow

Reporting

- E-Print
- Hyperion

Banner Resources

- Banner Authorization Requests
- Report a Duplicate Person/Non-person
- Search Class Schedule
- Search Course Catalog
- Electronic Forms
- Purchasing Department Website

**Whats New in HR**

**Banner Announcements**

4. Select the "Finance" tab
5. Click on "Budget Planner Menu."

my **UNM**

Back to Employee Life Tab

E-mail Calendar Groups Logout Help

Student Employee Payment **Finance**

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**The University of New Mexico**  
**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  
Enter a journal voucher of budget and/or actual activity.
- Budget Planner Menu**  
Use this menu for Budget Development phase information, Manage phase organization locks, View Budget Development report, or Update or review Salary Planner scenario information.
- Fund Balance Categorization  
Categorize Current Unrestricted Fund Balances according to UBPP 7000

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

[ Operating Ledger Queries | Encumbrance Query | Approve Documents | View Document | Journal Voucher Entry | Budget Planner Menu | Fund Balance Categorization ]

6. Click on "Maintain Organization Lock"

Student Employee Payment **Finance**

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RETURN TO FINANCE MENU SITE MAP HELP

**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  
Update budget projections for the current fiscal year end via a projected actuals worksheet.
- Maintain Organization Lock**  
Use this menu for Budget Development phase organization locks.
- Budget Development Reports Menu  
View Budget Development reports.
- Projected Actuals Reports Menu  
View Projected Actuals reports.
- Salary Planner Menu  
Update Position Budgets, Job Salary and Labor Distribution for the Upcoming Fiscal Year

7. **Chart of Accounts:** enter "U"
8. **Budget:** enter "BUD13" (The budget year to be locked or unlocked)
9. **Phase 1:** enter "ADOPTD" (The budget phase to be locked or unlocked)
10. **Current Status:** Click on the down arrow to select the appropriate lock status
  - a. All = Lists all organizations, locked and unlocked
  - b. Locked = List only locked organizations
  - c. Unlocked = List only unlocked organizations
11. **Organization:** Enter the organization code to be locked/unlocked or leave the field null

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## Maintain Organization Lock

**i** Chart, Budget ID and at least one Phase required. Select Default Phases to default phase information from the Budget. Select Status to display (or All). Leave Organization null to start with highest organizations(s) you are authorized to change, or designate a starting point.

Chart of Accounts: U

Budget: BUD13

Phase 1: ADOPTD

Current Status: Locked

Organization:

Submit

“Phase 2” and “Phase 3” should be left empty

Select All, Locked or Unlocked from the drop down box

If the Organization field is left null, it returns the highest organization authorized to be locked and/or unlocked

12. Click " Submit"
13. Review the "Parameters" section

- a. Ensure the correct information displays in the upper left hand section of the screen.

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## Budget Development Organization Lock

### Parameters

Chart of Accounts	U	University of New Mexico
Budget ID	BUD13	2013 Budget ID
Phase 1	ADOPTD	2013 Apopted Phase
Phase 2		
Phase 3		
Lock Status	Locked	
Organization	ABC	School of Public Administration

### Organization Lock Status

Organization Title	2013 Apopted Phase	Current Status	Change Status
<a href="#">ABC</a>	School of Public Administration	Locked *	<input type="checkbox"/>

Review

Update

## BD-106 Maintain Organizational Lock

14. In the “Organization Lock Status” section, if an organization code is underlined and displayed in blue, it allows for drill down to the next set of successor organizations and displays the organization lock/unlock “Current Status”.

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### Budget Development Organization Lock

**Parameters**

Chart of Accounts	U	University of New Mexico
Budget ID	BUD13	2013 Budget ID
Phase 1	ADOPTD	2013 Apopted Phase
Phase 2		
Phase 3		
Lock Status	Locked	
Organization	ABC	School of Public Administration

**Organization Lock Status**

Organization Title	2013 Apopted Phase	Current Status	Change Status
<u>ABC</u>	School of Public Administration	Locked *	<input type="checkbox"/>

Review Update

Drill down option

Status

An asterisk on a **Locked \*** record indicates at least one successor organization is Unlocked

15. To make lock/unlock changes, check the box of the organization in “Change Status”. Select “Review” to see the records marked for change or “Update” to change the status of marked records.

- Locking or unlocking an organization will lock or unlock all subordinate organizations. Applying Lock/Unlock status cascades downward. **Note:** See a message display indicating that the changes submitted have been applied.
- An asterisk on a Locked \* organization indicates at least one successor organization is unlocked.

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### Budget Development Organization Lock

**Parameters**

Chart of Accounts	U	University of New Mexico
Budget ID	BUD13	2013 Budget ID
Phase 1	ADOPTD	2013 Apopted Phase
Phase 2		
Phase 3		
Lock Status	Locked	
Organization	ABC	School of Public Administration

**Organization Lock Status**

Organization Title	2013 Apopted Phase	Current Status	Change Status
<u>ABC</u>	School of Public Administration	Locked *	<input type="checkbox"/>

Review Update

## BD-106 Maintain Organizational Lock

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RETURN TO BUDGET DEVELOPMENT MENU SITE MAP HELP

### Budget Development Organization Lock

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Lock changes submitted have been applied.

Return To Parameters

#### 16. Click "Return To Parameters"

- a. Enter the same information again to review the status and ensure the locks/unlocks have been placed successfully.
- b. Select another organization code to be locked/unlocked.

#### 17. To exit the Budget Development Organization Lock module, click on "Return To Budget Development Menu" at the top right of the screen.

\*\*\* END \*\*\*