



BUDGET PLANNER

SALARY PLANNER/BUDGET DEVELOPMENT



SP-108 Request Access for Salary Planner & Budget Development Roles

Date Issued/Rev: 3/11/2010

General Description: This procedure explains how to request security access for Salary Planner and Budget Development.

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

IMPORTANT NOTE: Know the highest level organization(s) that you need to access in order to apply salary increase information and enter department budgets. The authorization request requires entering the organization codes needed.

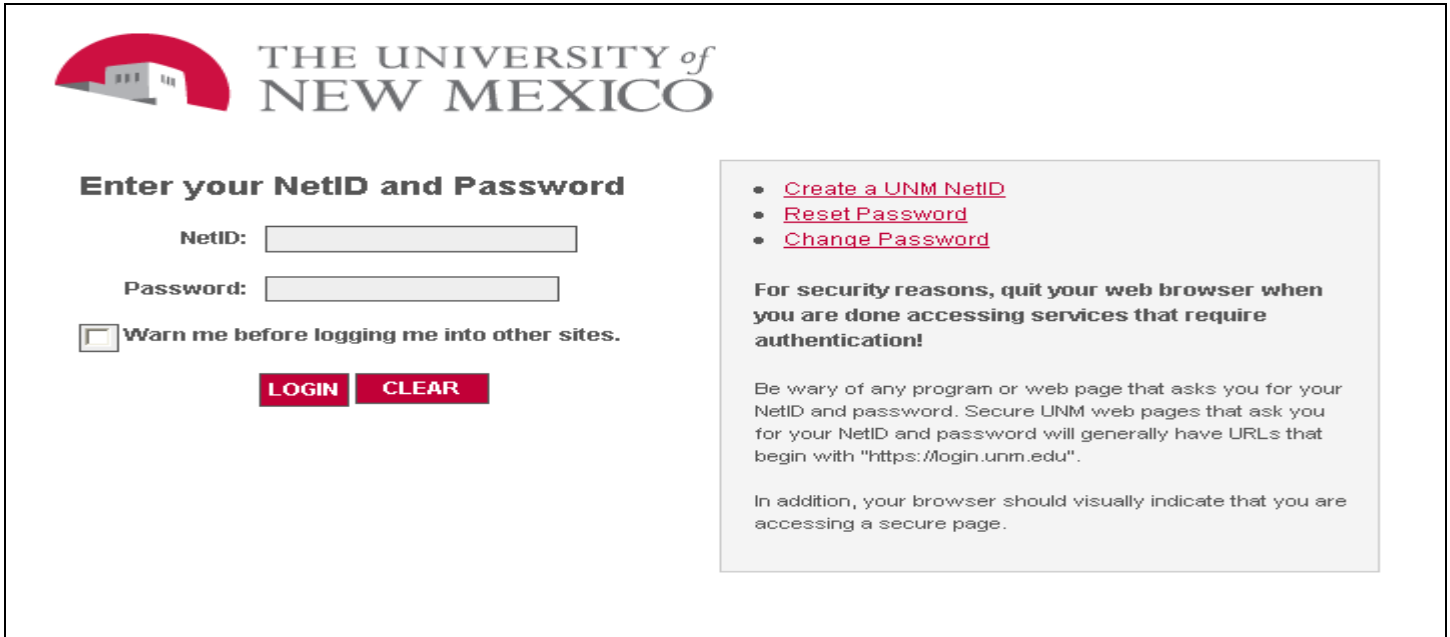
How to request access for Salary Planner and Budget Development

1. Logon to my.unm.edu
2. Select the "Employee Life" tab
3. Click on "Banner Authorization Requests"

The screenshot shows the my.unm.edu website interface. At the top, there is a navigation bar with tabs: Home, Campus Life, Library, UNM E-Mail, **Employee Life** (circled in red), Finance, and new. The date March 10, 2010 is displayed in the top right corner. The main content area is divided into several sections:

- Human Resources:** Contains links for 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), and 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:** Features a red banner stating "LoboWeb Unavailable 3/12 5pm - 3/18 8am" due to planned upgrades. Below this is the LoboWeb logo and a description of the service. A red button labeled "Enter LoboWeb" is present, with a note below it: "Due to scheduled backups, LoboWeb is unavailable Saturday 7:00 pm - 9:30 pm." A "Whats New in HR" section lists updates like "Banner System Upgrade - Important Updates" and "Staff as Students - Spring 2010 Event".
- Banner Applications:** Lists "Transaction and Real-time Query Systems" and provides links for Internet Native Banner, LoboWeb, LoboMart, UNJobs, and Workflow. It also includes a "Reporting" section with links for E-Print and Hyperion, and a "Banner Resources" section where "Banner Authorization Requests" is highlighted with a red box.
- Banner Announcements:** A red banner states "Banner Services Unavailable 3/12 5pm - 3/18 8am" due to planned upgrades, with a link to ITAlerts for more information.
- Benefits:** Includes a link for Dental Insurance.
- Employee and Organizational Development:** A section at the bottom of the page.

4. A Security Alert popup box appears. Click "Yes"
5. Enter your UNM NetID and Password



Enter your NetID and Password

NetID:

Password:

Warn me before logging me into other sites.

LOGIN **CLEAR**

- [Create a UNM NetID](#)
- [Reset Password](#)
- [Change Password](#)

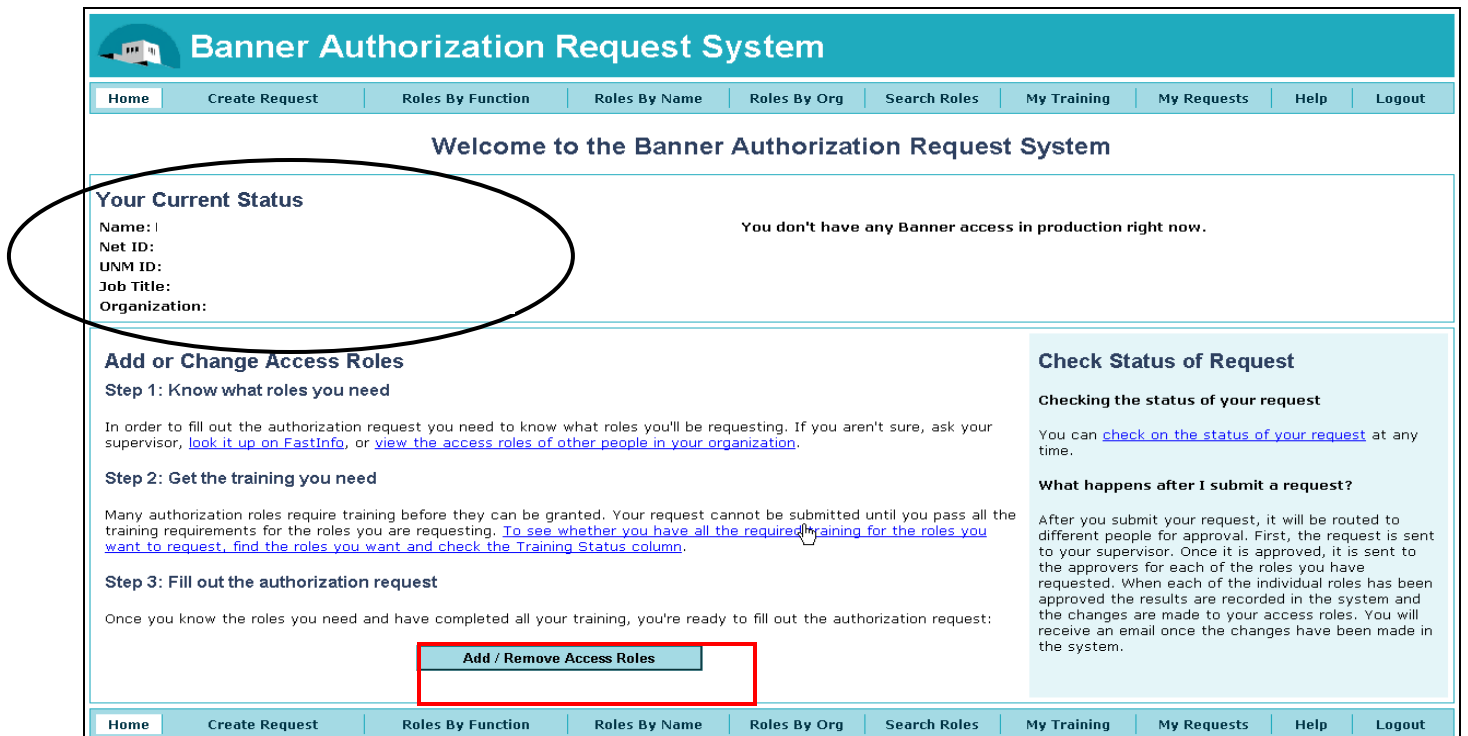
For security reasons, quit your web browser when you are done accessing services that require authentication!

Be wary of any program or web page that asks you for your NetID and password. Secure UNM web pages that ask you for your NetID and password will generally have URLs that begin with "https://login.unm.edu".

In addition, your browser should visually indicate that you are accessing a secure page.

Start an authorizations request

1. Verify all information regarding your current position status is correct.
2. If you do not have an existing request, scroll down and click on the "Add/Remove Access Roles" button



Banner Authorization Request System

Home | Create Request | Roles By Function | Roles By Name | Roles By Org | Search Roles | My Training | My Requests | Help | Logout

Welcome to the Banner Authorization Request System

Your Current Status

Name: | Net ID: | UNM ID: | Job Title: | Organization: |

You don't have any Banner access in production right now.

Add or Change Access Roles

Step 1: Know what roles you need

In order to fill out the authorization request you need to know what roles you'll be requesting. If you aren't sure, ask your supervisor, [look it up on FastInfo](#), or [view the access roles of other people in your organization](#).

Step 2: Get the training you need

Many authorization roles require training before they can be granted. Your request cannot be submitted until you pass all the training requirements for the roles you are requesting. [To see whether you have all the required training for the roles you want to request, find the roles you want and check the Training Status column.](#)

Step 3: Fill out the authorization request

Once you know the roles you need and have completed all your training, you're ready to fill out the authorization request:

Add / Remove Access Roles

Check Status of Request

Checking the status of your request

You can [check on the status of your request](#) at any time.

What happens after I submit a request?

After you submit your request, it will be routed to different people for approval. First, the request is sent to your supervisor. Once it is approved, it is sent to the approvers for each of the roles you have requested. When each of the individual roles has been approved the results are recorded in the system and the changes are made to your access roles. You will receive an email once the changes have been made in the system.

Home | Create Request | Roles By Function | Roles By Name | Roles By Org | Search Roles | My Training | My Requests | Help | Logout

3. If you currently have an incomplete request, click on the "Open Saved Access Request" button.

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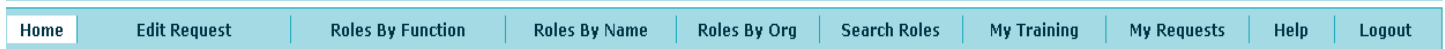
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NOTE: If you have existing Banner access, your current authorization is automatically copied into your new request.

4. Enter your supervisor's NetID. If you do not know your supervisor's NetID, please use the link provided to look it up in the UNM Directory.
5. Enter a detailed explanation of the business reason for this role.
6. Click on the "ADD Roles" or "Select Roles" button.

Request ID: 25339 **Created:** Mar-10-2010 **Status:** Open

Supervisor and reason for request

Supervisor's netID: Don't know the person's netID? [Link it up in the UNM directory](#)

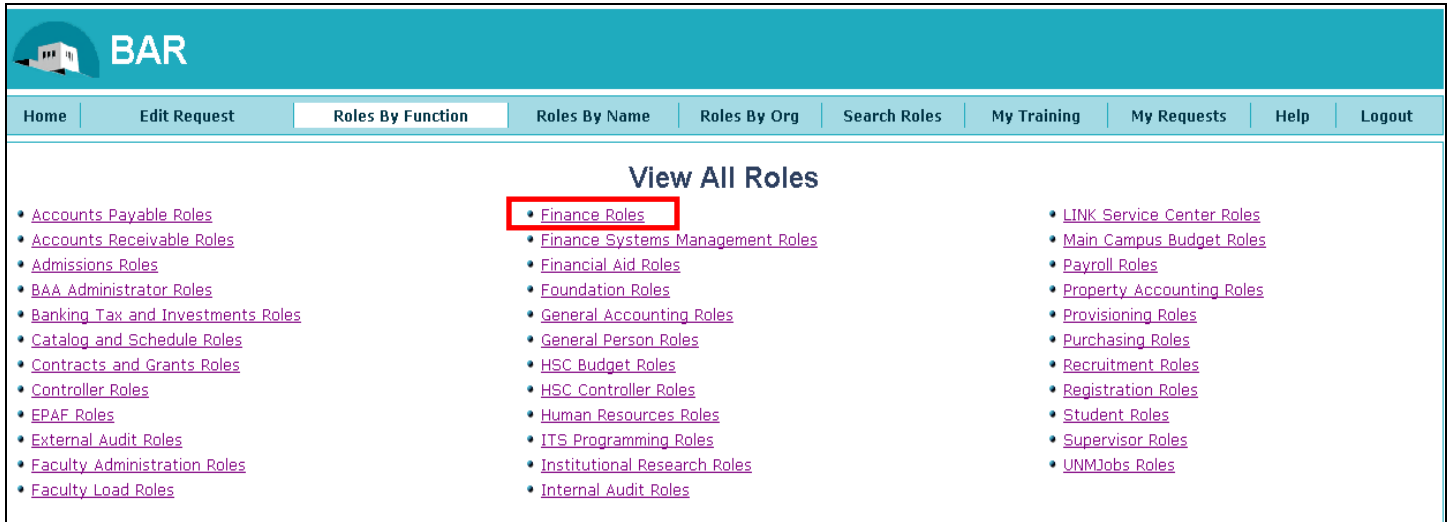
Reason you need this change in Banner access:
Please be specific. For example: "My job has changed and I will be entering time for my org"

Access roles requested

Remove Current Roles

Remove	Role Name
<input type="checkbox"/>	Hyperion Operational Data Store Developer
<input type="checkbox"/>	Department Approval Queue Setup Query
<input type="checkbox"/>	Department Direct Pay Processor
<input type="checkbox"/>	Department General Inquiry

7. Select FINANCE Roles from the list of links at the top. *You may have to click on SHOW ALL ROLES first.



8. Required training must be complete prior to selecting the role(s) and submitting it for approval. If you need training the message “Need Training” is displayed in red to the left of the role. “Training Complete” is displayed in green when you have completed the necessary training.

9. If training is needed, click on “Need Training” and a role description box displays. Additional course description information, course offerings and registration information can be found on Learning Central <https://learningcentral.health.unm.edu/elms/learner/login.jsp>

<input type="checkbox"/>	Training complete	Department Budget Developer	Develop and lock Organizational Budgets in Self Service Budget Development .
<input type="checkbox"/>	Training complete	Department Chart of Account Requester	RESTRICTED ROLE: This gives users the access to request new chart elements in Banner Finance. Users must be familiar with UNM Policies and Procedures, have a working knowledge of UNM and Banner Finance Chart of Accounts, and be responsible for the reporting in their department. Fiscal Agent approval is required for this role. Please see FastInfo #216 for more information.
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.
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.
You have it	Training complete	Department Journaler	This gives users the access to input journal vouchers, general encumbrances, and temporary budget entries.
<input type="checkbox"/>	Need training	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.
You have it	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.

10. Click the check box next to the selected role(s) as appropriate.

Select access roles: **Department Budget Developer and Department General Inquiry** if you are responsible to develop and lock organizational New Year budgets for indices.

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Select access role: **Department Salary Planner** if you are responsible to apply and lock organizational New Year salary increases for employees/positions.



14. Click on the “Add Selected Roles to My Request” button on the bottom of the page.



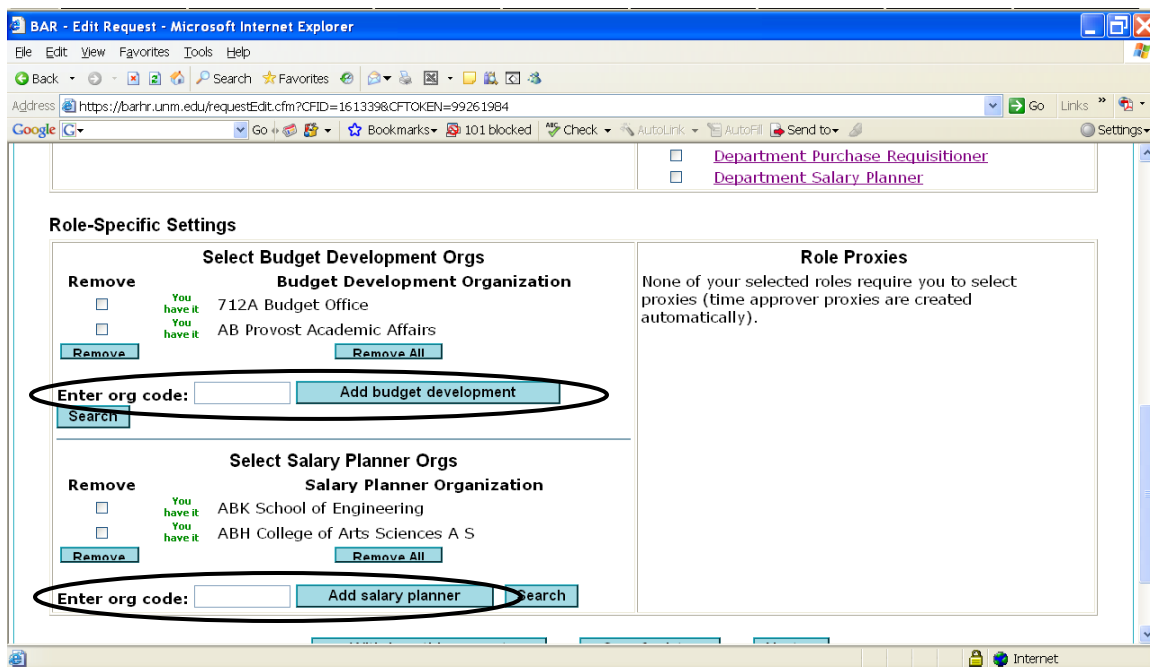
Role-Specific Settings Section

15. Enter the highest level Budget Development Organization(s) that you need in Budget Development and click the “Add Budget Development” button. If the org code is recognized, it will display in that section.

NOTE: You are requesting access to indices under a specific organization(s).

16. Enter the highest level Salary Planner Organization(s) that you need in Salary Planner and click the “Add Salary Planner” button. If the org code is recognized, it will display in that section.

NOTE: You are requesting access to positions/employees under a specific hiring organization(s).



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17. Confirm that all the information is correct.
18. Click the “Next” button at the bottom of the page.
19. Again, confirm that all the information is correct.
20. Submit the Request.
21. Once submitted, your supervisor receives a notice to approve or disapprove this request. You will be notified via email when the access request has been approved/disapproved.

*** END ***