



BUDGET PLANNER SALARY PLANNER



SP-103 Budgeting for Pooled Positions

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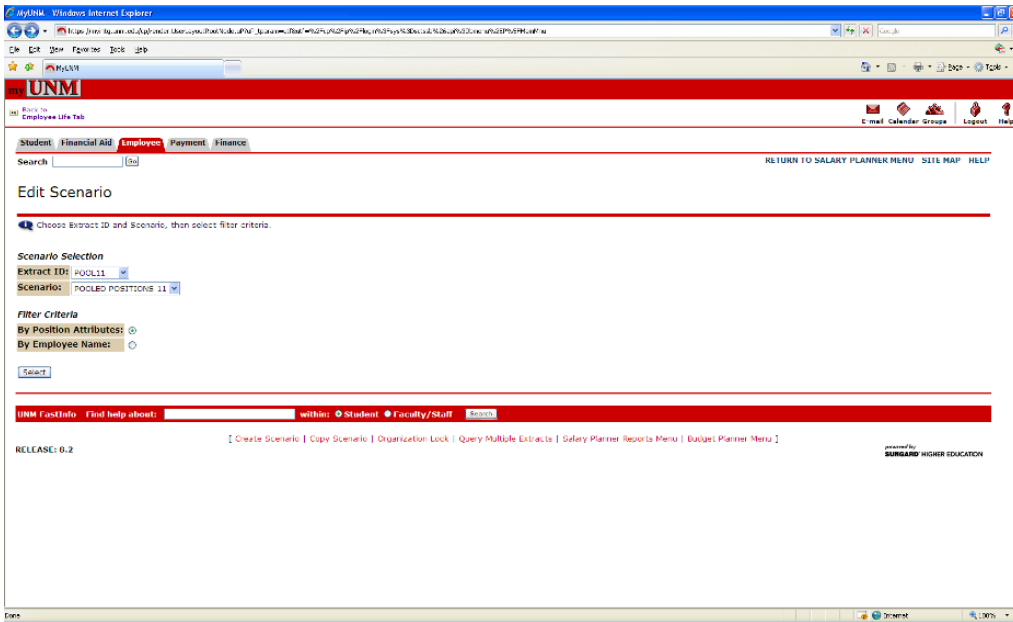
General Description: This procedure explains how departments/end users will access and apply changes to Pooled Position budgets in Salary Planner using LoboWeb.

Responsible Departments: Human Resources

IMPORTANT INFORMATION: A salary planner role (Department Salary Planner) with appropriate security is required before beginning this procedure. If this role has not been requested and approved, go to my.unm.edu and follow the link [Banner Authorization Requests](#) and apply for the appropriate role.

How to Budget for Pooled Positions

1. Logon to my.unm.edu
2. Select the "Employee Life" tab
3. Click on "LoboWeb"
4. Select the "Finance" tab
5. Click on the "Budget Planner Menu"
6. Click on "Salary Planner Menu"
7. Click on "Edit Scenario"
8. **Extract ID:** enter "POOL11" or use the drop down arrow to select "POOL11"
9. **Scenario:** defaults to "POOLED POSITIONS 11."
10. Click on the radio button for "By Position Attributes" and Click Select



The **Position Filters** screen displays showing the Extract ID and Scenario selected in the previous steps. Verify that this is the correct selection before proceeding.

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

POOL11, POOLED POSITIONS 11

Organizations:	All 007A - HSC Clinical Contracting 013A - Continuing Medical Educ Department	←	<p>Select the org code or select ALL</p> <p>Check or uncheck subordinate Orgs</p> <p>Select a specific class or select ALL</p> <p>Select All or None</p> <p>Select All or None</p> <p>Boxes are checked</p> <p>Select records to be displayed on page</p> <p>Click on LIST BY POSITION</p>
Include Subordinate Organizations:	<input checked="" type="checkbox"/>	←	
Employee Class:	All FP - Post Doctoral and Fellows FT - Temporary Faculty	←	
Bargaining Unit:	All None	←	
Faculty Rank:	All None	←	
Include Pooled Positions:	<input checked="" type="checkbox"/>	←	
Include Vacant Positions:	<input checked="" type="checkbox"/>	←	
Number of Records per Page:	100	←	
<input type="button" value="List By Employee"/> <input type="button" value="Summary Totals"/> <input style="border: 2px solid black; border-radius: 50%; padding: 2px 10px;" type="button" value="List By Position"/>			

11. **Organizations:** Click on the down arrow to select the organization code(s) to be edited during the current session or ALL.
12. **Include Subordinate Organizations:** Check the box to display subordinate organizations or uncheck to display only the selected organization.

13. **Employee Class:** Click the down arrow to select the employee class to be edited during the current session or ALL.
14. **Bargaining Unit:** Click to select ALL or NONE. The default is ALL. **NOTE:** There will be no bargaining unit employees listed in the pooled position scenario. Bargaining unit employees are in separate scenarios.
15. **Faculty Rank:** The default is ALL. **NOTE:** There will be no faculty employees listed in the pooled position scenario. Faculty employees are in separate scenarios.
16. **Include Pooled Positions:** The default for the box is checked.
17. **Include Vacant Positions:** The default for the box is checked.
18. **Number of Records per Page:** Click the arrow to select 25, 50, or 100 records per page.
19. Click the button LIST BY POSITION.

Enter a Mass Change and select Mass Apply, or modify an individual position and select Save. Rounding applies to Mass Changes and individual position changes.

Mass Change

Percent:
 Amount:

Mass Apply

NOTE: Mass change fields on the List by Position page should not be used to update position budgets. Follow the link [Position and Title](#) and update positions individually from the Position Detail page.

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Estimated Fiscal Year Budget	Links	Extract Status	Hide from Scenarios
FP0003 Post Doctoral Fellow	100.00	100.00	1	<input type="text" value="1"/>	.00	<input type="text" value=".00"/>	<input type="text" value=".00"/>	<input type="text" value=".00"/>		.00	Distribution Comments Employee		<input type="checkbox"/>

Position Detail

Mass Changes

Percent:
 Amount:

Apply

* - indicates a required field.

Budget Detail for Position FP0003 Post Doctoral Fellow

	Proposed	Base Current
Fiscal Year Budget:	<input type="text" value=".00"/>	<input type="text" value=".00"/>
FTE: *	<input type="text" value="1"/>	<input type="text" value="1"/>
Appointment Percent:	100.00	<input type="text" value="100.00"/>
Total Salaries:		
Estimated Fiscal Year Budget:	<input type="text" value=".00"/>	
Exclude from Totals:	<input type="checkbox"/>	

Apply changes to the budgeted amount by using the "AMOUNT" field at the top of the page under the heading "Mass Changes". Click the button APPLY. **NOTE:** Estimate the total cost that will be realized during the fiscal year for this position. **FTE:** Estimate the FTE associated with the dollar amount budgeted. Input the estimated FTE in the first column under the Proposed FTE field. Click the button SAVE and exit using the List By Position link.

NOTE: Ignore the astronomical amount in the change percent field.

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit
FP0003 Post Doctoral Fellow	100.00	100.00	1	<input type="text" value="1"/>	.00	<input type="text" value="2,000,000.00"/>	<input type="text" value="20,000.00"/>	<input type="text" value="20,000.00"/>	

From the List By Position page, follow the link [Distribution](#) to edit the position budget labor distribution.

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Estimated Fiscal Year Budget	Links	Extract Status	Hide from Scenarios
FP0003 Post Doctoral	100.00	100.00	1	<input type="text" value="1"/>	.00	<input type="text" value=".00"/>	<input type="text" value=".00"/>	<input type="text" value=".00"/>			.00 Distribution Comments Employee		<input type="checkbox"/>

Position Labor Distribution

Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

Budget Distribution for Position FP0003 Post Doctoral Fellow.

Current

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount
U	667000	2U0224 667A	20F0	P131	GNACTV					100.00	.00
Total										100.00	.00

Proposed

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount	Del
U	<input type="text" value="667000"/>	<input type="text" value="2U0224 667A"/>	<input type="text" value="20F0"/>	<input type="text" value="P131"/>	GNACTV					<input type="text" value="100.00"/>	<input type="text" value="20,000.00"/>	<input type="text" value="X"/>
Total										100.00	20,000.00	

This Position has no incumbents

[Position Detail](#)
[List By Employee](#) | [List By Position](#) | [Summary Totals](#)

UNM FastInfo Find help about: within: Student Faculty/Staff

If any index is **not** to be used on July 1st, click the button DEL (delete).
 Add a new index by clicking the link “Add New Record.”

*** END ***