



## Budget Planner SALARY PLANNER



### SP-106 Organization Lock

Date Issued/Rev: 03/29/2010

**General Description:** This procedure explains how to lock and unlock organizations within Salary Planner. Organizational locks at higher organizational levels prevent users with subordinate organizational security from making changes to positions/jobs. The locking process has a cascading effect; when you lock/unlock a higher organization all organizations beneath it that are tied to it become locked/unlocked as well.

**Responsible Manager:** Division of Human Resources

**IMPORTANT INFORMATION:** Please refer to the Budget Development Calendar located on <http://www.unm.edu/~budget/> for the locking dates.

#### Things to Remember

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**Locking = Approved**

**Unlocking = Unapproved**

- ✓ An asterisk (\*) next to Locked/Unlocked status indicates a subordinate organization has a different lock status.
- ✓ To change the lock status of an organization, a user must have update authority above that organization, and above the highest predecessor of the organization that is locked.
- ✓ Once an Organization is locked, users with access at that level may no longer make changes to positions and jobs. However, a user with posting access to a predecessor organization that is still unlocked can post changes to the locked organization.
- ✓ Locks/unlocks cascade downward.

#### How to Lock/Unlock a Salary Planner Organization

1. Logon to my.unm.edu
2. Select the "Employee Life" tab

- Under Banner Applications, click on “LoboWeb” or under the LoboWeb For Employees click on “LoboWeb”

The screenshot shows the University of New Mexico website with the following elements:

- Navigation tabs: Home, Campus Life, Library, UNM E-Mail, **Employee Life** (circled), Finance, new
- Date: February 26, 2010
- Human Resources section with links for General Information, Career Development, and Staff Resources.
- LoboWeb For Employees section with announcements for unavailability on 3/06/10 and 2/27/10, a LoboWeb logo (circled), and an "Enter LoboWeb" button.
- Banner Applications section with links for Internet Native Banner, LoboWeb (circled), LoboMart, UNMJobs, and Workflow.
- Whats New in HR section.
- Banner Announcements section.

- Select the “Finance” tab
- Click on “Budget Planner Menu”
- Click on “Salary Planner Menu”
- Click on “Organization Lock”

The screenshot shows the Salary Planner application interface with the following elements:

- Navigation tabs: Student, **Employee**, Payment, Finance
- Search bar with a "Go" button
- Links: RETURN TO MENU, SITE MAP, HELP
- Section: Salary Planner
- Menu items:
  - Create Scenario
  - Copy Scenario
  - Edit Scenario
  - Organization Lock** (circled)
  - Query Multiple Extracts
  - Salary Planner Reports Menu
  - Budget Planner Menu

## SP-106 Organization Lock

Student **Employee** Payment Finance

Search

[RETURN TO SALARY PLANNER MENU](#) [SITE MAP](#) [HELP](#)

### Organization Lock Selection

**i** Select an Extract ID and Scenario. Select the Lock Status All to display Organizations regardless of status or choose a status. Leave Organization blank to start with the highest level Organization you have authority to change or designate a starting Organization.

Extract ID:

Scenario:

Lock Status:

Organization:

8. **Extract ID:** Use the dropdown arrow and select the extract ID to apply an organization lock status against. **Note: You lock organizations by extract ID/ scenario. To lock all employees within an organization, you must lock the organization within each extract/scenario individually**
9. **Scenario:** The scenario field will default automatically
10. **Lock Status:** defaults to “All” or click on the down arrow to select the appropriate lock status:
  - All = List all orgs, locked and unlocked
  - Locked = List only locked orgs
  - Unlocked = List only unlocked orgs
11. **Organization:** Enter the organization code you wish to lock/unlock or leave the field null. **Note:** If the field is left null, it will return the highest organization you are authorized to lock and unlock
12. Click “Submit” and this takes you to the “Change Organization Lock” menu

### Change Organization Lock

Mark the Change checkbox and select Update to change an Organization's Lock Status. Select Review to see the subset of records marked for change. Select an Organization to display the successor organizations.

**Parameters**

Extract ID: RSTAFF11  
Scenario: REG STAFF 11  
Lock Status: All  
Organization: ADE - Associate VP for Facilities Mgmt

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**Organization Lock Status**

Organization Title	Lock Status	Change
<u>ADE</u> Associate VP for Facilities Mgmt	Unlocked	<input type="checkbox"/>

**Drill down option** (points to ADE)

**Status** (points to Unlocked)

[Choose Organization Lock](#)

13. Review the “Parameters” section to ensure you are accessing the correct information
14. In the “Organization Lock Status” section, if the organization is underlined and displayed in blue, it allows for drill down to the next set of subordinate organizations and apply locks/unlocks at those levels
15. Verify the “Lock Status” to ensure the organization is not already locked or unlocked

## SP-106 Organization Lock

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16. **Change Column:** Check the box of the organization you wish to lock or unlock. **Note:** Locking or unlocking an organization will lock or unlock all subordinate organizations. Applying locks and unlocks has a cascade effect
17. Click the “Update” button. **Note:** A message displays indicating that the changes submitted have been applied
18. Review the “Lock Status” column to verify changes were applied
19. Click on “Choose Organization Lock” to go back to “Organizational Lock Selection” menu or click “Return to Menu” to go back to the Salary Planner Menu.

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