BUDGET PLANNER

BUDGET DEVELOPMENT

Budgeted Account Code Report

Date Issued/Revised: 3/07/2018

General Description: This report provides the budgeted amount by index and summary total for a particular account code within an organization. **Any account code** that has been budgeted can be queried including labor and Budgeted Use of Reserves 1901 account codes.

Purpose: The report is primarily a department or organization report. The report is used to verify account code totals by index for an organization. Also, this report would help a department, college or VP unit to tie out allocations.

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

Related Procedure: Create Budget Worksheet

How to request a Budgeted Account Code Report

1. Login to myUNM
2. Login to LoboWeb using one of the three options listed below:
   - Click on "ENTER LOBOWEB" in the LoboWeb (Employees) section. Then select the "Finance" tab
   - Click on "Finance" in the Quick links
   - Click on "LoboWeb" in the UNM Business Applications section. Then select the "Finance" tab
3. Click on the "Budget Planner Menu"
4. Click on "Budget Development Reports Menu"
5. Click on "Budgeted Account Code Report"
6. **Chart of Accounts:** enter "U"
7. **Budget ID:** enter "BUDxx" (the new fiscal year)
8. **Budget Phase:** enter "ADOPTD"
9. **Include Suborgs:** leave default setting on "Yes"
10. **Enter report request information:**
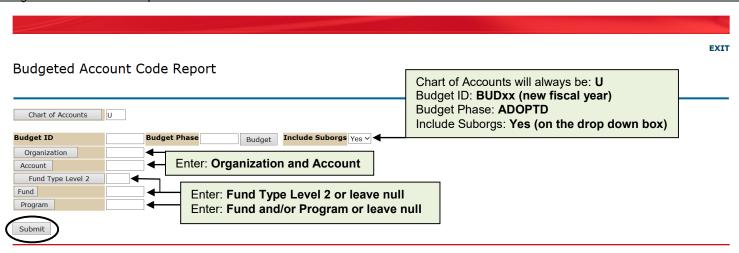
> **Organization:** Enter organization code (Level 1-7)
>
> **Account:** Enter account code
>
> **Fund Type Level 2:** Enter Fund Type Level 2 (02, 03, etc.) or leave null
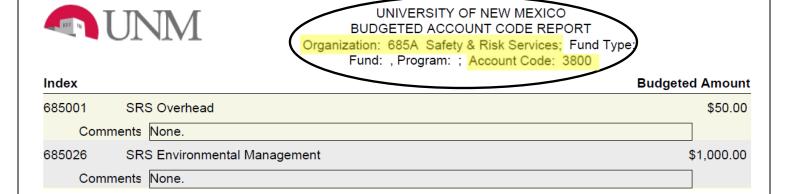>
> **Fund:** Enter fund code (Level 2 or 3) or leave null
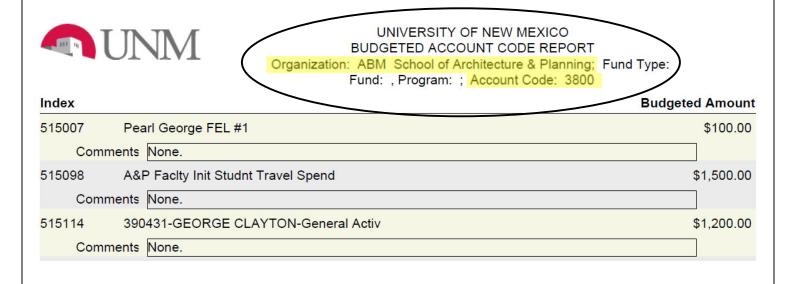>
> **Program:** Enter program code (Level 2 or 3) or leave null

EXIT

Budgeted Account Code Report

| Chart of Accounts | U |

| Budget ID | | Budget Phase | | Budget | Include Suborgs | Yes ∨ |

Organization	
Account	
Fund Type Level 2	
Fund	
Program	

Submit

Chart of Accounts will always be: **U**
Budget ID: **BUDxx (new fiscal year)**
Budget Phase: **ADOPTD**
Include Suborgs: **Yes (on the drop down box)**

Enter: **Organization and Account**

Enter: **Fund Type Level 2 or leave null**
Enter: **Fund and/or Program or leave null**

To run the report: Click "Submit"

Budgeted Account Code by index for a Level 5 Organization report:

UNM

UNIVERSITY OF NEW MEXICO
BUDGETED ACCOUNT CODE REPORT
Organization: 685A Safety & Risk Services; Fund Type:
Fund: , Program: ; Account Code: 3800

Index		Budgeted Amount
685001	SRS Overhead	$50.00
	Comments None.	
685026	SRS Environmental Management	$1,000.00
	Comments None.	

Budgeted Account Code by index for a Level 3 Organization report:

UNM

UNIVERSITY OF NEW MEXICO
BUDGETED ACCOUNT CODE REPORT
Organization: ABM School of Architecture & Planning; Fund Type:
Fund: , Program: ; Account Code: 3800

Index		Budgeted Amount
515007	Pearl George FEL #1	$100.00
	Comments None.	
515098	A&P Faclty Init Studnt Travel Spend	$1,500.00
	Comments None.	
515114	390431-GEORGE CLAYTON-General Activ	$1,200.00
	Comments None.	

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Budgeted Account Code by index for a Fund and Level 3 Organization:

UNM

UNIVERSITY OF NEW MEXICO
BUDGETED ACCOUNT CODE REPORT
Organization: ABK School of Engineering SOE; Fund Type:
Fund: 2U0224, Program: ; Account Code: 31K0

Index		Budgeted Amount
023247	Mech Engr I&G Non-labor Operating	$50.00
	Comments None.	
052002	111440-SOE Admin-Dean's Office	$28.00
	Comments None.	
271409	ECE I&G Non-labor Operating	$1,000.00
	Comments None.	

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