Budget Prep Lock Procedure

The Lock feature closes prep access to all organizations below the level being locked. The lock process should be performed in both the Salary Planner and Budget Development modules. There is no email notification when your organization locks so it is important to communicate with the chain of command. (Note: There is no need to lock at the “FOP Level” (Level 7 Org), as there are no levels below this in the hierarchy)

Budget Prep is typically worked in 4 phases with intermediate phases and deadlines determined by each college/division. Below is an example of the flow for a typical division.

- Phase 1---Departments (Level 7 Organizations). Once the department level has completed working in Budget Development the next level of review should be notified so they can lock the budget.
- Phase 2---College/Division Level (Level 4 Organization). This level will lock at the Level 4 organization code so the security levels below will no longer have access to update the data. This will allow for review of the data and to ensure targets are being met.
- Phase 3---Provost/VP Level (Level 2 organization). This level will lock at the (level 1 organization so the security levels below will no longer have access to update the data. This will allow for a final review of the data and to ensure targets are being met.
- Phase 4---Budget Department. This level will lock the entire Budget Prep module so that update access is limited to Budget staff.

![Organization Hierarchy Diagram](Image of organization hierarchy)

- Locks out levels 3 through 7
- Locks out levels 5 through 7
- No need to lock as there are no levels below

Page 1 of 5
Lock Salary Planner

Level 5 (and higher) approvers will need to “Lock Salary Planner” when beginning this phase of Budget Prep. From the Salary Planner Menu, select **Lock Salary Planner**.

![Salary Planner](image)

**Select Extract ID:** TTU FY20## Extract (TTU)
   TTUSA FY20## Extract (TTUSA)

**Scenario:** The Scenario will default based on the Extract ID selected

**Lock Status:** Choose from the drop down:

- All – will display locked and unlocked status
- Locked – will display locked status only
- Unlocked – will display unlocked status only

**Organization:**

Organization Options:

- Leave blank to lock all Organizations you have security for
- Enter specific Organization code
Budget Prep Lock Procedure

Click the **Submit** button to access the “Change Organization Lock” page

![Organization Lock Selection](image)

Leave blank to access all Orgs you have security for or put in Org code

**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:** TTU FY2011 Extract
- **Scenario:** 11SAL
- **Lock Status:** All
- **Organization:** C11000 - Admin and Finance Info Systems Mgmt

Check box in **Change** column to change lock status

![Organization Lock Status](image)

**Click** Update to Save Changes

![Click to Update](image)
Lock Budget Development

Level 5 (and higher) approvers will need to “Lock Budget Development” when beginning this portion of Budget Prep.

From the Budget Prep Menu, select: **Lock Budget Development**

**Budget Prep Menu**

- Update Budget Transfers
- Update Transfers In and Transfers Out for a specified phase and FOP.
- Budget Prep Security (TEAM)
- Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.
- Budget Prep Reports
- View Budget Development and Salary Planner reports.

- Lock Budget Development
- Lock or unlock update to Budget Development and Budget Transfers
- Salary Planner Menu

**Budget Development Organization Lock**

- Chart: BudgetID 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: T (TTU) or S (TTUSA)
  - Budget: T20## (TTU) or S20## (TTUSA)
  - Phase 1: T##DPT (TTU) or S##DPT (TTUSA)
  - Current Status: Select **All**
  - Organization: Leave blank for all that you have security for or enter specific Organization code
Budget Prep Lock Procedure

Click the **Submit** button to access the “Budget Development Organization Lock” page

Check box in **Change** column to change lock status

Click **Update** to Save Changes

**Unlocking Budgets in Salary Planner or Budget Development**

Complete the processes stated above to change a “locked” status to an “unlocked” status.