

New Features- April 2020

Original/Initial Budget

A new column titled 'Original' has been added to the Financial Budget and a new column titled 'Initial Budget' to the Position Budget in LOBA. These columns display the July 1st beginning budget, of the current fiscal year, prior to any permanent adjustments being processed. The 'Current' budget column includes all permanent budget adjustments processed since July 1st and reflects the current budget in Workday. The columns were added for users to easily see a comparison between the current year budget and the proposed budget for the following fiscal year.

New Search Tabs

Two new tabs, **Financial Worktag Search** and **Position Worktag Search**, have been added in LOBA to assist the user with the search functionality. These tabs work similarly to the existing tabs and require the same security access of Cost Center manager or Department Head in Workday. While the search feature was previously limited to cost center hierarchy, with the addition of the new tabs searches can now be performed by the following:

- Agency
- Budget Code
- Cost Center
- Function
- Fund
- Grant
- Ledger Account
- Position
- Program
- Project
- Revenue Category
- Spend Category

Financial Worktag Search

The Financial Worktag Search will load budget line detail for any Worktag selected.

- **Select Worktag** – select the appropriate Worktag from the drop-down list.
- **First Quick Search** – In the first quick search section, the user can search by description or ID. Double-click the desired row, only the budget line details for the Worktag clicked will be shown.
- **Second Quick Search** – allows users to view detail of only filtered groups of data, such as all detail for a particular Ledger Account.

- "Quick Search" can be used to sort or can be used as a filter by entering text and clicking the circular arrow.
- **Change Budget Line** –
 1. Single-click the budget line detail row to be changed
 2. Enter the "Proposed Budget" amount
 3. Click enter to save changes
 4. Add a comment by Double-Clicking (instructions below)

The "Difference" column will automatically compute and display the difference between the current and proposed budget amounts for that particular budget line. The "Original" column will remain the same throughout the budgeting process.

- **Add a Comment** – details of budget changes can be noted by adding a comment
 1. Double-click budget detail line
 2. Click the box under "Add Comment" heading
 3. Click yellow plus sign "Save Comment" when complete

Position Worktag Search

The Position Worktag Search allows the Cost Center Managers and Department Head to review their respective position budgets. This tab and the Position Budget Tab are for viewing position information only. **Any corrections to the Position Budget must be processed in Workday. For LSU A&M units, these corrections will be prepared by Budget & Planning. Please send requests to John Duplantis at jdupl12@lsu.edu. All requests must include:**

Name
Position number
Program number/driving worktag and dollar amount for each split
Source of funds if needed

- **Select Worktag (Position)** – select the appropriate Worktag from the drop-down list.
- **First Quick Search** – In the first quick search section, the user can search by description or ID. Double-click the desired row, only the budget line details for the Worktag clicked will be shown.
- **Second Quick Search** – allows users to view detail of only filtered groups of data, such as all detail for a particular Ledger Account.
- "Quick Search" can be used to sort or can be used as a filter by entering text and clicking the circular arrow.