MU FY2027 Budgeting FAQs

1. **Whom do I contact for help?**
   For Workday questions, contact the MU Budget team at budget@missouri.edu. For guidance on how to estimate or develop your budget, work with your division's finance office.

2. **Where can I find more information during budget season?**
   Visit the Budget website for timelines, instructions, and detailed guides: Budgeting // Division of Finance & Business Services.

3. **What is the link for our budgeting tool (Workday)?**
   Go to: https://login.adaptiveinsights.com/app. Log in using only your **xxxx@umsystem.edu** email address. Do **not** enter a password.
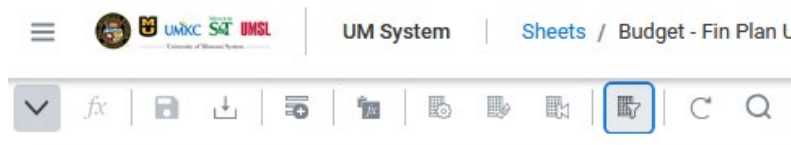
4. **Why are the lines I'm trying to budget grayed out or read-only?**
   You must select a specific **Deptid**, **Fund**, and **Program** in the header. When you are ready to enter budget, none of the fields should show "All."
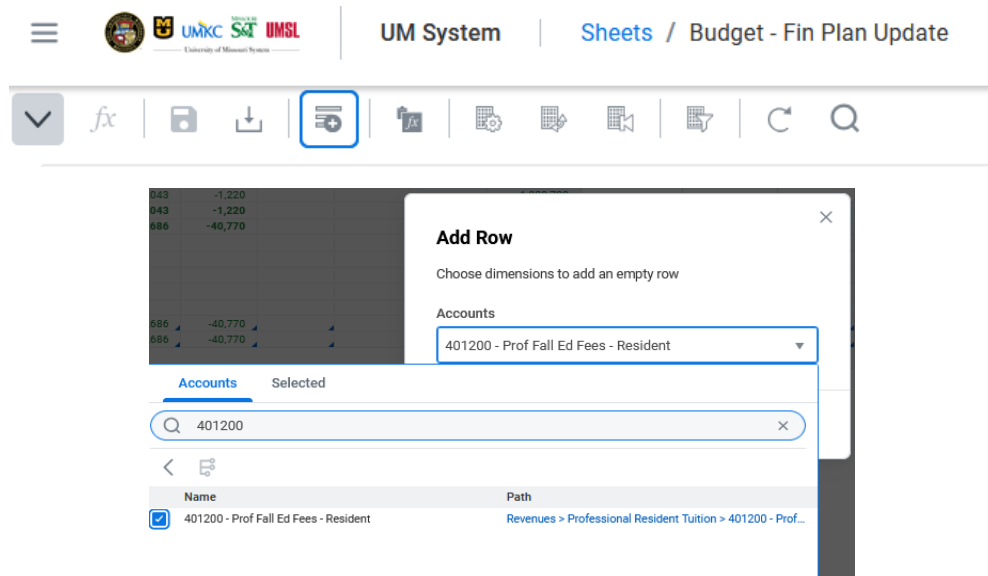

5. **Why do I not see 'FY27' on my sheet?**
   Click **Display Options** at the top of the page and ensure **FY27** is selected.

6. **How do I add an account that is not listed in my Deptid?**
   Click **Add Row** at the top of the screen and enter the account you want to add.
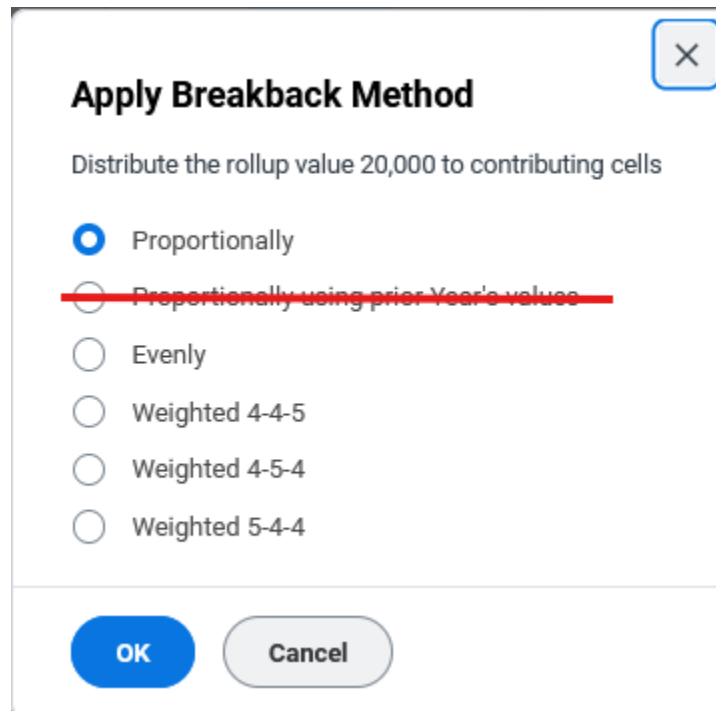
7. **What if the account I want to add does not appear?**
    You must use Workday roll-up accounts when budgeting. The full list is available <u>here</u> in column E of the 'Workday_PS_Budget Levels' tab.

8. **I've entered a total in FY2027 and want it spread across the year. What option should I use?**
    Select **Proportionally** to apply the monthly pattern that was seeded at the beginning of budget season.

    Do not select 'Proportionally using prior Year's values.'
    Because you are building the FY27 budget while FY26 is still in progress, the system treats FY26 as the 'prior year' and will spread your budget only across the months that have already occurred in FY26 – resulting in an incorrect distribution.

9. **I deleted the seeded spread. How do I restore it?**
   The seeded spread was based on the last completed fiscal year.

    Copy the cells from **JUL-2024 through JUN-2025** and paste them into the year being budgeted. Then enter your new FY2027 total and select **Proportionally**.

10. **A cell changed but I didn't edit it. Can I see who did?**
    Yes, for **Fin, Capital, and Transfer** sheets:
    Right-click the cell > **Explore Cell > View Audit Trail** to see who made changes and when.
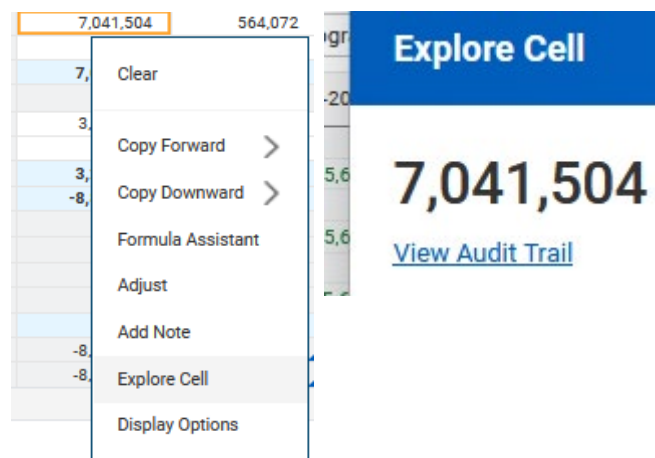
11. **What if I don't have an EmplID or position number for a new position?**
    Run a **C90 report** and use one of the available new employee IDs from that list.

Business Unit: COLUM

C90 BUDGET WORKING New Employee Placeholders - Available

Employee Type	Employee	Budget Working Placeholder Available? (1 = Yes)
New	COLUM, New Employee - E97670000	1
	COLUM, New Employee - E97670001	1
	COLUM, New Employee - E97670002	1

12. **Why is Workday calculating a higher per-person benefit rate than expected?**
    If the 'ACAD YR' flag is 'Yes', but the start and end dates are longer than 9 pay periods, then the system prorates the PPR rate upward, increasing the calculated benefit rate.

13. **How do I split a position with Hospital?**
    Add a second line for the employee using position number **P97000001 – Split-Paid Position** and enter the **Level,** but leave **Fund, Program, and Project** fields blank. You will need to update the Dept FTE fields as needed to reflect the amount of FTE to be paid by your CSD and the Hospital respectively. This line does not feed other sheets but forces Workday to calculate the PPB rate correctly. Add a comment noting that this is a dummy line for benefit calculation only.

14. **When do I use the Capital Planning Update sheet?**
    If you will transfer funds to **Campus Facilities Planning, Design & Construction (PD&C)** in FY27 to cover project expenses, record the transfer on the **Capital Planning Update** sheet -not on the Transfers Data Entry sheet.

15. How can I see what I have budgeted by Deptid?
Run a **Budget Working** snapshot in **Power BI** and pivot the data. This shows all budgeted accounts by Deptid. Power BI refreshes nightly so users will need to wait until the next day to review adjustments made to budgets in Power BI.