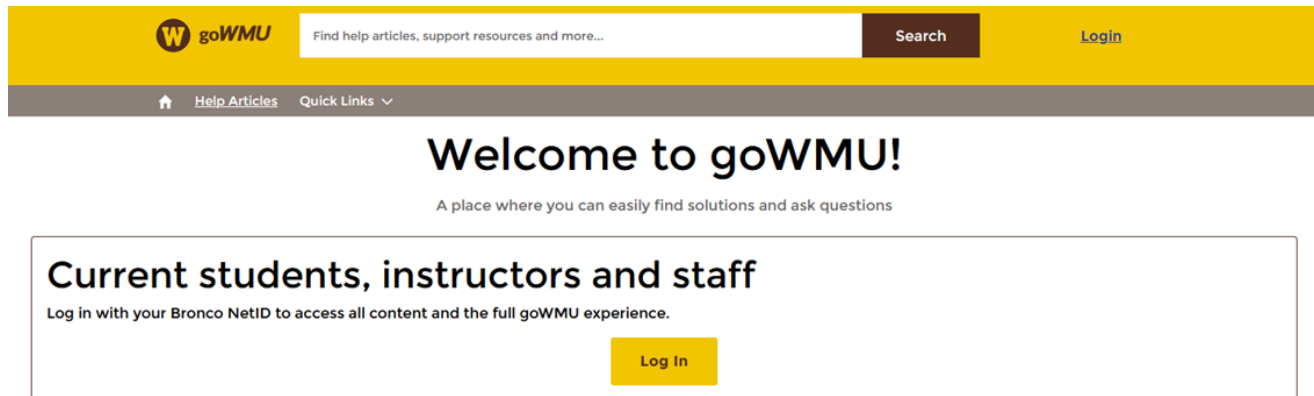


PeopleSoft BES User Guide

Office of University Budgets and Financial Planning

- Log into PeopleSoft Financials through GoWMU located on the WMU homepage or <https://go.wmich.edu>
- Log into GoWMU using your Bronco Net Id and password



Welcome to goWMU!

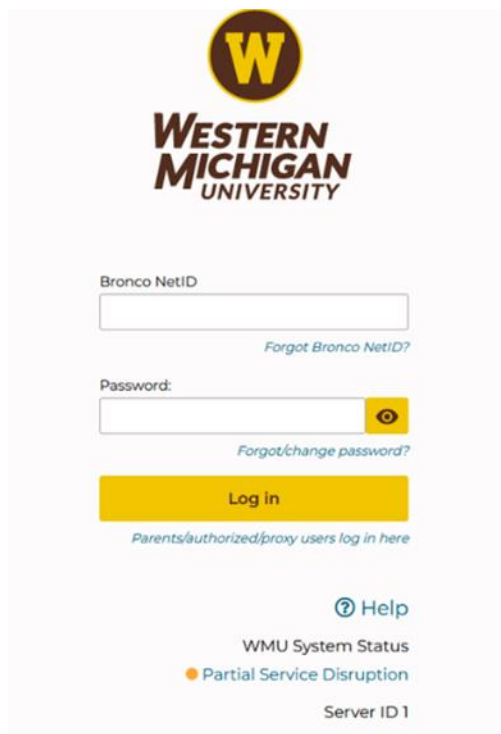
A place where you can easily find solutions and ask questions

Current students, instructors and staff

Log in with your Bronco NetID to access all content and the full goWMU experience.

[Log In](#)

Once you're on the GoWMU page, you'll need to log in. After you are logged in to GoWMU, locate the list "Most used apps" (scroll down) and select PeopleSoft Financials (PSFN) closer to the bottom of the page.



WESTERN MICHIGAN UNIVERSITY

Bronco NetID

[Forgot Bronco NetID?](#)

Password:

[Forgot/change password?](#)

[Log In](#)

[Parents/authorized/proxy users log in here](#)

[Help](#)

WMU System Status
● Partial Service Disruption

Server ID 1

Welcome to goWMU, Rose!

A place where you can easily find solutions and ask questions

Announcements

Monthly security updates installed Jan. 28

Online payments unavailable Friday morning, Jan. 26

[View All](#)

Most used apps



W-Exchange

Email, communication and collaborations tools.



Elearning

The official online learning management system for courses.



Employee Self-Service

Requires [VPN](#) if off-campus




Degree Works

Instructor and staff access

Resources for instructors and staff

Here are some additional resources to find information at WMU.

- [Campus Maps](#)
- [COVID-19 Resources](#)
- [Data Access Requests & Security Re-Authorization](#)
- [Dining](#)
- [Facilities](#)
- [Human Resources](#)
- [Payroll](#)
- [Policies](#)
- [Sindecuse Health Center](#)
- [Student Concern Form](#)
- [Technology Help Desk](#)
- [University Recreation](#)
- [Western Wellness](#)



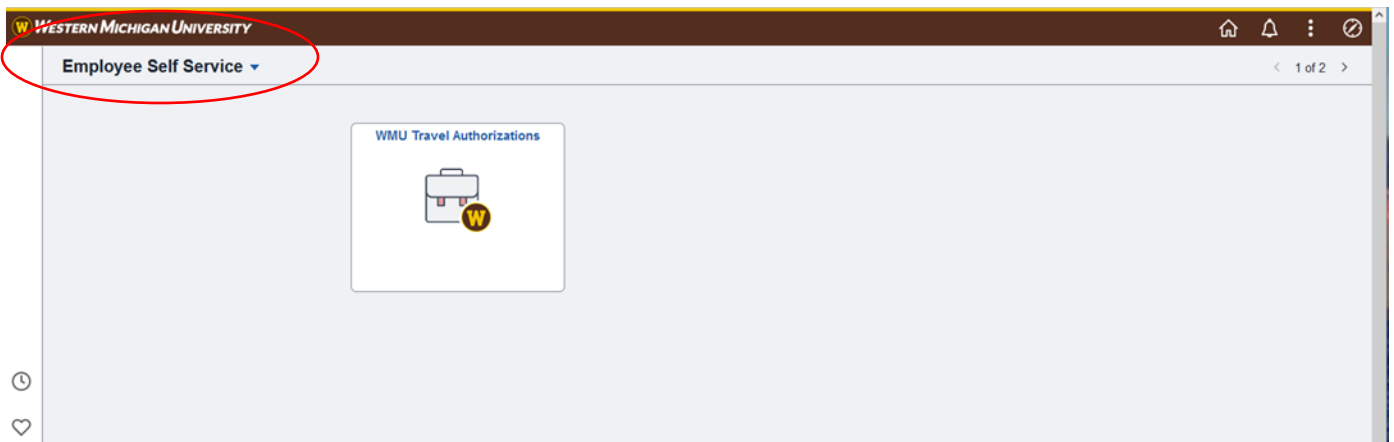
PeopleSoft Financials

Requires [VPN](#) if off-campus



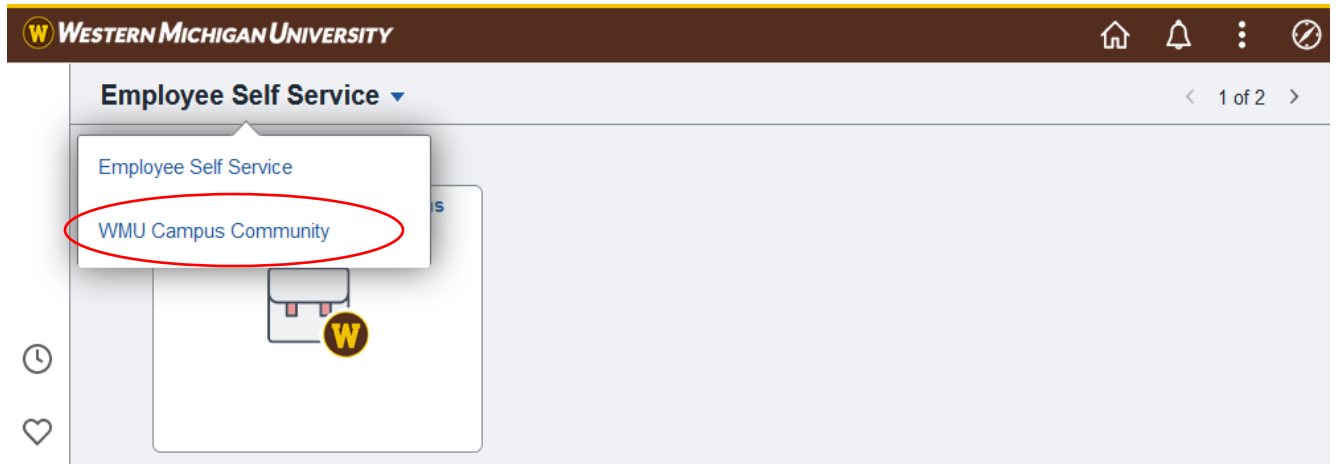
PeopleSoft HR

Requires [VPN](#) if off-campus

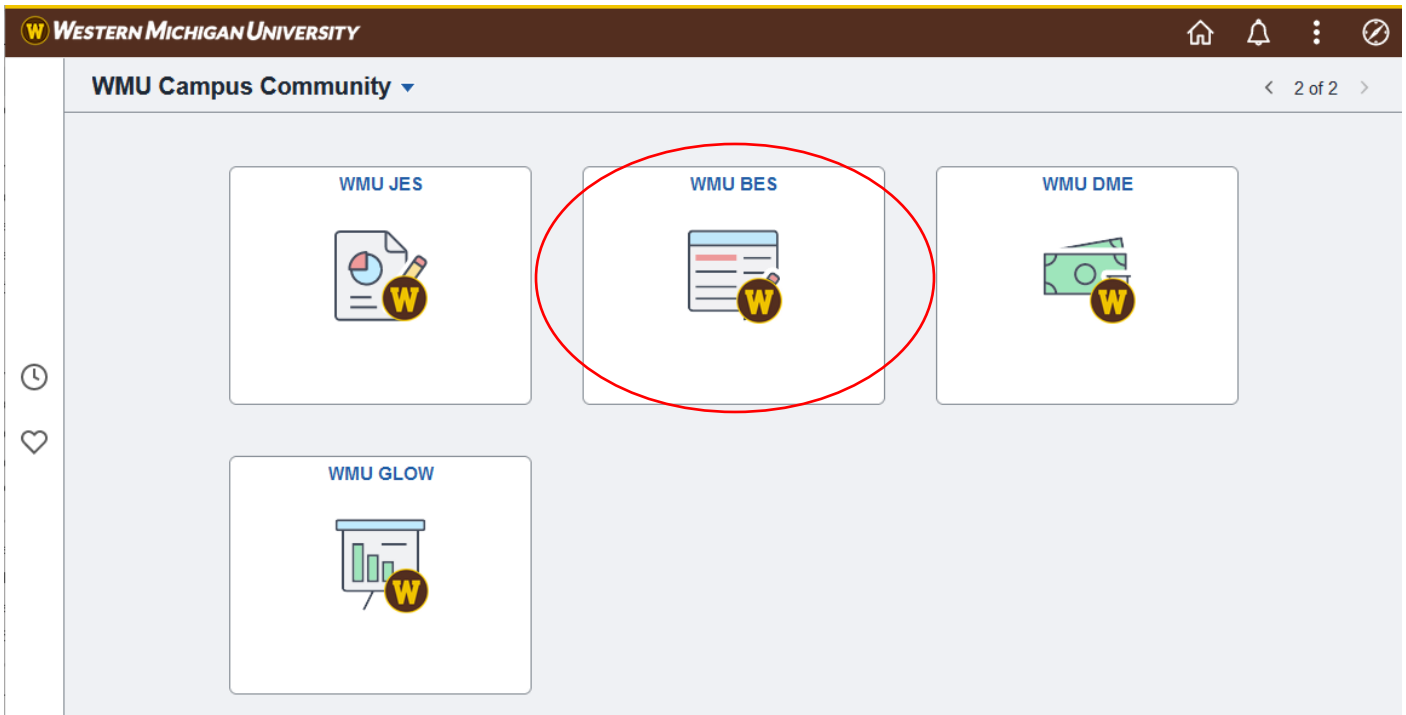


- From the main page, select the Employee Self Service drop down in the upper left corner of the page.

- Next, select WMU Campus Community.



- You will then see the tiles for which you have access. Select the BES tile.



- Select "Add a New Value" to add a new BES or "Find an Existing Value" to correct or copy an existing BES.
- When adding a new BES, select One-Time or Permanent from the BES Type dropdown box, then click Add.
 - The one-time budget entry option shows up on GLOW for the current year.
 - The permanent budget entry option does not show up on GLOW for the current year. This option creates an adjustment that will modify your current permanent base, reflected in the next year.

WMU Campus Community WMU BES [New Window](#) | [Help](#)

BES Entry

Create/Modify BES

BES Daily Review Report

BES Error Report-All

BES Admin

BES Special Accounts

WMU:GL BES Entry

[Find an Existing Value](#) [Add a New Value](#)

*Business Unit WMICH

*BES ID NEXT

*Journal ID NEXT

*Journal Date 01/26/2024

*BES Type Budget Entry (BES) One-Time

Budget Reference

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

- All budget adjustments must occur within one fund. Once you've selected the fund, it will appear in the journal rows in the fund column.
- Enter your 5-digit phone number and 3 initials.
- Enter your BES journal description, which should include your department name or Abbreviation. This will help the budget office process your journal more quickly.

WMU Campus Community WMU BES [New Window](#) | [Help](#)

BES Entry

Create/Modify BES

BES Daily Review Report

BES Error Report-All

BES Admin

BES Special Accounts

Budget Journal Entry

BES Status: Not Saved

Business Unit: WMICH

BES ID: NEXT

BES Type: BES-OneTm

*Fund 11 *Phone ext + Initials 7000RRR *Internal Description CAS-Fund Joe Doe P#1234

For Budget Office Review

☐ POST TO PRIOR PERIOD

Limited to 250 Non-Fringe Journal Lines

Line	Orig Line	Error	*Account	Fund	*Department	Amount (No Decimals Allowed)	*Journal Line Description
1		<input type="checkbox"/>		11			
2		<input type="checkbox"/>		11			

JOURNAL LINES: [Delete Blank Rows](#) [Hide Fringe Rows](#) [Insert 1-to-1 Offsetting Entries](#)

BES ACTIONS: [Print BES](#) [Export BES to Excel](#) [Copy BES](#) [Delete BES](#)

Journal Date 01/26/2024 Journal ID NEXT OprID thomasr Source BES

Ledger BUDGET Budget Reference ☐ Review Complete

[View Journal](#)

[Add](#) [Update/Display](#)

[Save](#)

- Enter your journal lines as necessary. The amount column should be entered as whole numbers (no decimals)

- The Journal Line Description is what you will see in GLOW. When you add the account (object code) it automatically adds that description. You should overwrite this with your description to make it meaningful for you to know exactly why the BES was done for future reference.
- Select “Post to Prior Period” to make a budget adjustment to a prior period. The Budget Office will review the journal and approve it for posting in a prior period.

WMU Campus Community | WMU BES | New Window | Help

BES Entry

Create/Modify BES

BES Daily Review Report

BES Error Report-All

BES Admin

BES Special Accounts

Wmu GI Bes Entry

Budget Journal Entry

BES Status: Not Saved

Business Unit: WMCH

BES ID: NEXT

BES Type: BES-OneTm

*Fund: 11 *Phone ext + Initials: 7000RRR *Internal Description: CAS-Fund Joe Doe P#1234

For Budget Office Review

☐ POST TO PRIOR PERIOD

Limited to 250 Non-Fringe Journal Lines

Line	Orig Line	Error	*Account	Fund	*Department	Amount (No Decimals Allowed)	*Journal Line Description		
1		<input type="checkbox"/>		11				+	-
2		<input type="checkbox"/>		11				+	-

JOURNAL LINES: Delete Blank Rows Hide Fringe Rows Insert 1-to-1 Offsetting Entries

BES ACTIONS: Print BES Export BES to Excel Copy BES Delete BES

Journal Date: 01/26/2024 Journal ID: NEXT OpriD: thomasr Source: BES

Ledger: BUDGET Budget Reference

View Journal

Save Add Update/Display

- You may select “Insert 1-to-1 Offsetting Entries” to add an offset line equal to your original line(s).
 - You will need to add the object code and may adjust other fields as needed.
 - This feature can only be used once in a journal.

WMU Campus Community | WMU BES | New Window | Help

BES Entry

Create/Modify BES

BES Daily Review Report

BES Error Report-All

BES Admin

BES Special Accounts

Wmu GI Bes Entry

Budget Journal Entry

BES Status: Not Saved

Business Unit: WMCH

BES ID: NEXT

BES Type: BES-OneTm

*Fund: 11 *Phone ext + Initials: 7000RRR *Internal Description: VPAA Mid-Yr Fndg

For Budget Office Review

☐ POST TO PRIOR PERIOD

Limited to 250 Non-Fringe Journal Lines

Line	Orig Line	Error	*Account	Fund	*Department	Amount (No Decimals Allowed)	*Journal Line Description		
1		<input type="checkbox"/>	4150	11	3200200		Mid-Yr Fndg	+	-
2		<input type="checkbox"/>		11				+	-
3		<input type="checkbox"/>	3511	11	3200200		Mid-Yr Fndg	+	-
4		<input type="checkbox"/>		11				+	-

JOURNAL LINES: Delete Blank Rows Hide Fringe Rows Insert 1-to-1 Offsetting Entries

BES ACTIONS: Print BES Export BES to Excel Copy BES Delete BES

Journal Date: 01/26/2024 Journal ID: NEXT OpriD: thomasr Source: BES

Ledger: BUDGET Budget Reference

View Journal

Save Add Update/Display

- Fringes will automatically calculate upon saving your BES.

- Your journal will save with a unique BES ID, even if your journal is out of balance.
- You will need to correct any errors before the BES will post.
- A four-digit position number is required for all regular faculty and staff positions.
- The FTE amount field is available when entering a permanent adjustment.
 - Examples where a change in FTE should be entered are the creation of new positions, the deletion or inactivation of an existing position, moving positions between departments, faculty salary option changes, and retirement load reductions. (Please note, this is not an all-inclusive list. Please consult with your Budget Officer if you have questions.)
 - **Please review your Personnel Listing for current FTE values within your departments. If you are not changing or moving the FTE, you do not need to enter an FTE amount.**
- You may select “Hide Fringe Rows” to remove viewing those rows. Upon saving the journal, the fringe lines will return.

Budget Journal Entry

Business Unit: WMICH
 BES ID: BES0000000116
 BES Type: BES-Perm

BES Status: Errors
 Errors: - Total does not net to \$0
 - You are out of Balance: \$20600

For Budget Office Review
☐ POST TO PRIOR PERIOD

*Fund: 11 *Phone ext + Initials: 74286CJP *Internal Description: Perm adjustment

Limited to 250 Non-Fringe Journal Lines

Line	Orig Line	Error	*Account	Fund	*Department	Amount (No Decimals Allowed)	Position Number	FTE Code	FTE Amount	*Journal Line Description
1			3211	11	1252500	40000	0016	FTE	1.00	41Administrative Staff
2	1		3911	11	1252500	3060				FICA (OASDI & MED)
3	1		3912	11	1252500	6740				Retirement Expense
4	1		3927	11	1252500	10800				Fringe Benefits
5			4150	11	1252500	-40000				Budget-Budget Alloc/Prog Dev

JOURNAL LINES:
[Delete Blank Rows](#) [Hide Fringe Rows](#) [Insert 1-to-1 Offsetting Entries](#)

BES ACTIONS:
[Print BES](#) [Export BES to Excel](#) [Copy BES](#) [Delete BES](#)

Journal Date: 11/18/2019 Journal ID: NEXT OprID: cpuckett Source: BES
 Ledger: PERMANENT Budget Reference: FY2021 ☐ Review Complete

[View Journal](#)

- Once you’ve saved your journal and corrected any errors, you may either Print your BES or Export it to Excel. You may also copy a BES. When copying a journal, you may adjust lines and dollar amounts as necessary, then save.

BES ID: BES000000116
 BES Type: BES-Perm ☐ Enable Fringe Corrections

*Fund: 11 *Phone ext + Initials: 74286CJP *Internal Description: Perm adjustment

For Budget Office Review ☐ POST TO PRIOR PERIOD

Limited to 250 Non-Fringe Journal Lines

Line	Orig Line	Error	*Account	Fund	*Department	Amount (No Decimals Allowed)	Position Number	FTE Code	FTE Amount	*Journal Line Description
1			3211	11	1252500	40000	0016	FTE	1.00	41Administrative Staff
2	1		3911	11	1252500	3060				FICA (OASDI & MED)
3	1		3912	11	1252500	6740				Retirement Expense
4	1		3927	11	1252500	10800				Fringe Benefits
5			4150	11	1252500	-53024				Budget-Budget Alloc/Prog Dev
6			3711	11	1252500	-5000	0024			Research Staff
7	6		3911	11	1252500	-383				FICA (OASDI & MED)
8	6		3912	11	1252500	-843				Retirement Expense
9	6		3927	11	1252500	-1350				Fringe Benefits

JOURNAL LINES:
[Delete Blank Rows](#) [Hide Fringe Rows](#) [Insert 1-to-1 Offsetting Entries](#)

BES ACTIONS:
[Print BES](#) [Export BES to Excel](#) [Copy BES](#) [Delete BES](#)

Journal Date: 11/18/2019 Journal ID: NEXT OprID: cpuckett Source: BES
 Ledger: PERMANENT Budget Reference: FY2021 ☐ Review Complete

[View Journal](#)

- You may search your BES to make a change or check the status.
- Using the "Saved Search" you have 6 different search options.

WMU BES

BES Entry

Create/Modify BES

BES Daily Review Report

BES Error Report-All

BES Admin

BES Special Accounts

WMU:GL BES Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Use Saved Search: [1-My BES Worklist](#) [2-My Completed BES](#) [3-All My BES](#) [4-Valid-Budget Review](#) [5-All](#) [6-Deleted from GL](#)

*Business Unit:

BES ID: begins with

Journal ID: begins with

Journal Date:

BES Type:

BES Status:

User ID:

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

[Find an Existing Value](#) [Add a New Value](#)

- BES Status gives you 4 additional search options.
- Your journals will be listed below your selection criteria.

WMU Campus Community WMU BES

BES Entry

Create/Modify BES

BES Daily Review Report

BES Error Report-All

BES Admin

BES Special Accounts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Use Saved Search: [v]

*Business Unit [v] WMICH [Q]

BES ID [begins with] [v]

Journal ID [begins with] [v]

Journal Date [v] [v]

BES Type [v]

BES Status [v]

User ID [v]

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria Delete Saved Search

Search Results

View All [1-1 of 1]

Business Unit	BES ID	Journal ID	Journal Date	BES Type	Description	BES Status	User ID	Comments
WMICH	BES0000008584	NEXT	01/26/2024	BES-Perm	CAS Pull Minnick Perm Line	Valid	kpm5456	Waiting for Completed BES processing

Find an Existing Value Add a New Value

WMU:GL BES Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Use Saved Search: 5-All [v]

Business Unit [v] WMICH [Q]

BES ID [begins with] [v]

Journal ID [begins with] [v]

Journal Date [v] [v]

BES Type [v]

BES Status [v] Valid - Budget Review [v]

User ID [v] cpuckett

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria Delete Saved Search

Search Results

View All First 1-4 of 4 Last

Business Unit	BES ID	Journal ID	Journal Date	BES Type	Description	BES Status	User ID
WMICH	BES0000000088	NEXT	11/07/2019	BES-Perm test perm	Valid-Rvw	cpuckett	
WMICH	BES0000000089	NEXT	11/07/2019	BES-Perm test post to prior	Valid-Rvw	cpuckett	
WMICH	BES0000000090	NEXT	11/07/2019	BES-Perm test	Valid-Rvw	cpuckett	
WMICH	BES0000000105	NEXT	11/15/2019	BES-Perm test review	Valid-Rvw	cpuckett	

- A status of “Valid – Budget Review” means that the BES will not post until the Budget Office reviews it. (This is for ALL permanent budget entries and one-time entries with “post to prior period” selected.)
- A status of “Errors” means the BES has errors that need to be corrected by the user before it can be processed.

- A status of “Valid – Ready to Post” means that all errors and reviews have been resolved and your BES is ready to post in the overnight batch process.
- A status of “Complete” means that your BES has been successfully created in the General Ledger and it has been assigned a sequential Journal ID. This is the Journal ID that you will see in GLOW.
- Users will not be able to delete a BES, but can re-use it. You may leave your journal out of balance so that it doesn’t post overnight (it will have an out of balance error). We suggest entering REUSE in the description so that you can identify any reusable BES journals.
- If you must have a BES deleted, please contact the Budget Office to do this for you.

Business Unit

BES ID

Journal ID

Journal Date

BES Type

BES Status

User ID

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

Search Results

View All

First 1-2 of 34 Last

Business Unit	BES ID	Journal ID	Journal Date	BES Type	Description	BES Status	User ID
WMICH	BES0000000015	B000413995	07/05/2019	BES-OneTm	test	Complete	cpuckett
WMICH	BES0000000026	B000413904	07/31/2019	BES-OneTm	Test Budget Codes	Complete	cpuckett
WMICH	BES0000000029	NEXT	07/31/2019	BES-Perm	Test BES for Demo	Errors	cpuckett
WMICH	BES0000000032	NEXT	09/05/2019	BES-Perm	Test	Errors	cpuckett
WMICH	BES0000000045	B000413954	09/11/2019	BES-OneTm	Test Fringe	Complete	cpuckett
WMICH	BES0000000046	B000413996	09/11/2019	BES-Perm	Test Permanent BES	Complete	cpuckett
WMICH	BES0000000074	B000413950	09/30/2019	BES-OneTm	TEST 1x BES	Complete	cpuckett
WMICH	BES0000000075	B000413951	09/30/2019	BES-Perm	TEST perm BES	Complete	cpuckett
WMICH	BES0000000076	B000413955	09/30/2019	BES-Perm	TEST post to prior	Complete	cpuckett
WMICH	BES0000000080	B000413977	11/06/2019	BES-Perm	Test perm entry	Complete	cpuckett
WMICH	BES0000000081	B000413978	11/06/2019	BES-Perm	test perm	Complete	cpuckett
WMICH	BES0000000082	B000413979	11/06/2019	BES-OneTm	test	Complete	cpuckett
WMICH	BES0000000083	B000413989	10/31/2019	BES-OneTm	test one time BES	Complete	cpuckett