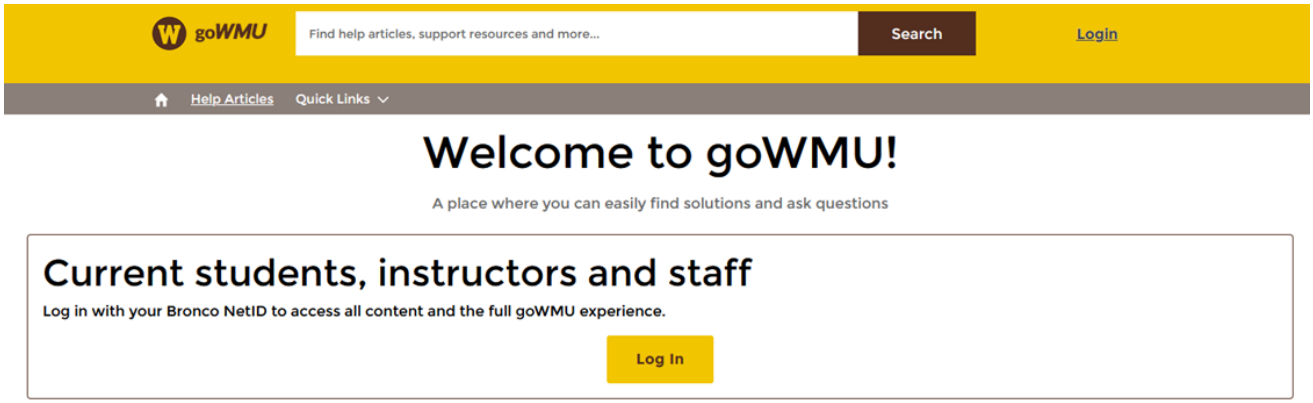
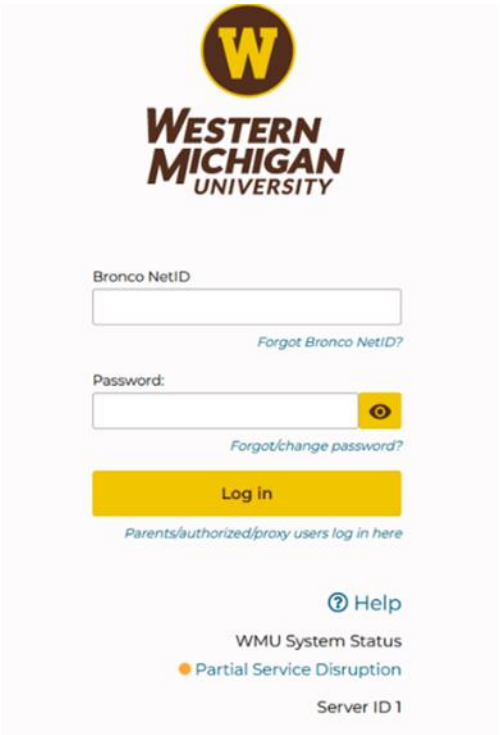
PeopleSoft BES User Guide

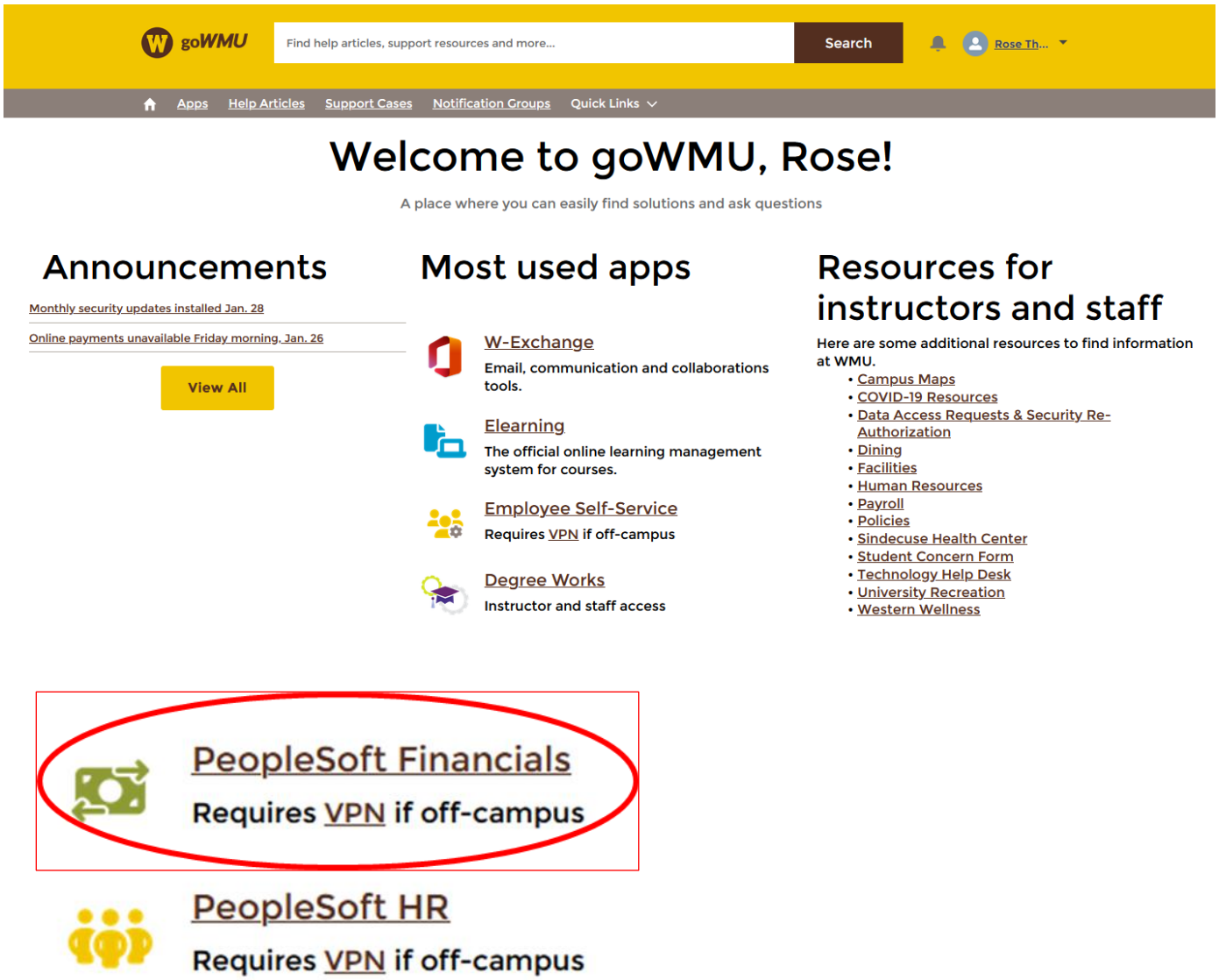
Office of University Budgets and Financial Planning

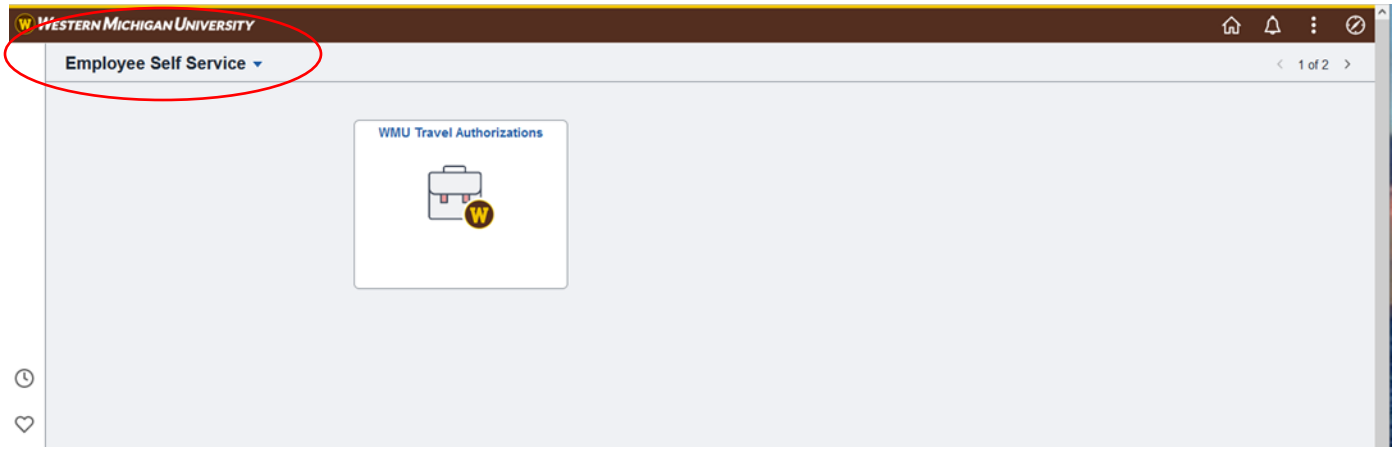
- Log into PeopleSoft Financials through GoWMU located on the WMU homepage or https://go.wmich.edu
- Log into GoWMU using your Bronco Net Id and password



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.

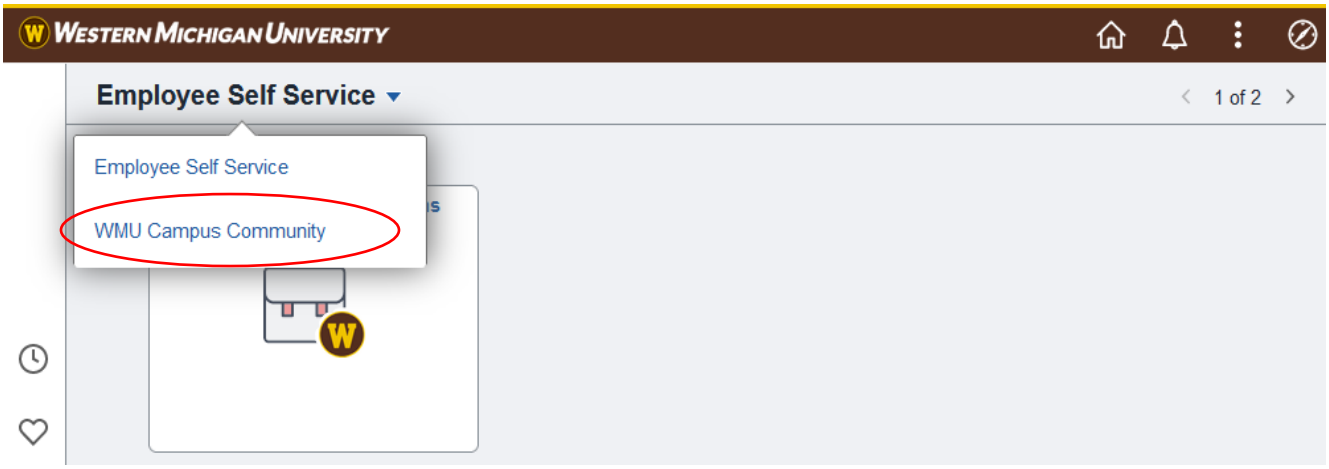




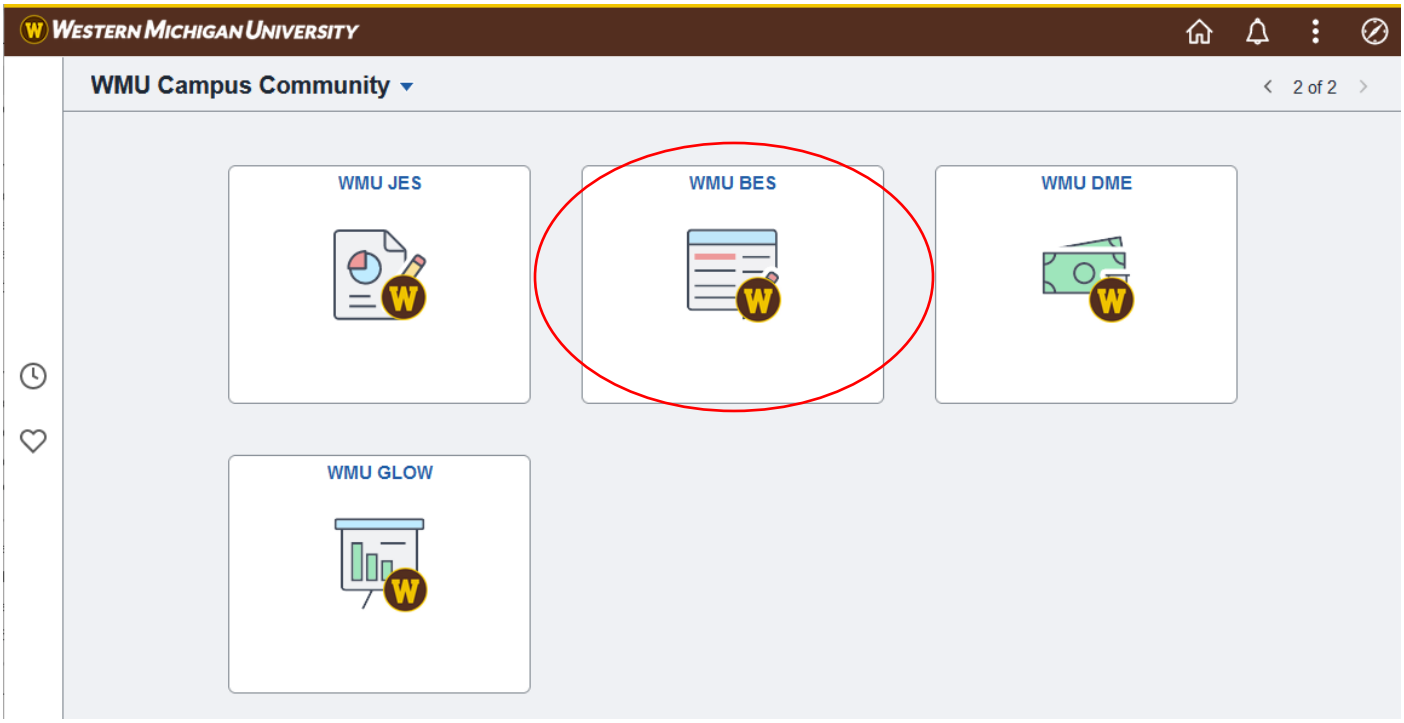


- From the main page, select the Employee Self Service drop down in the upper left corner of the page.

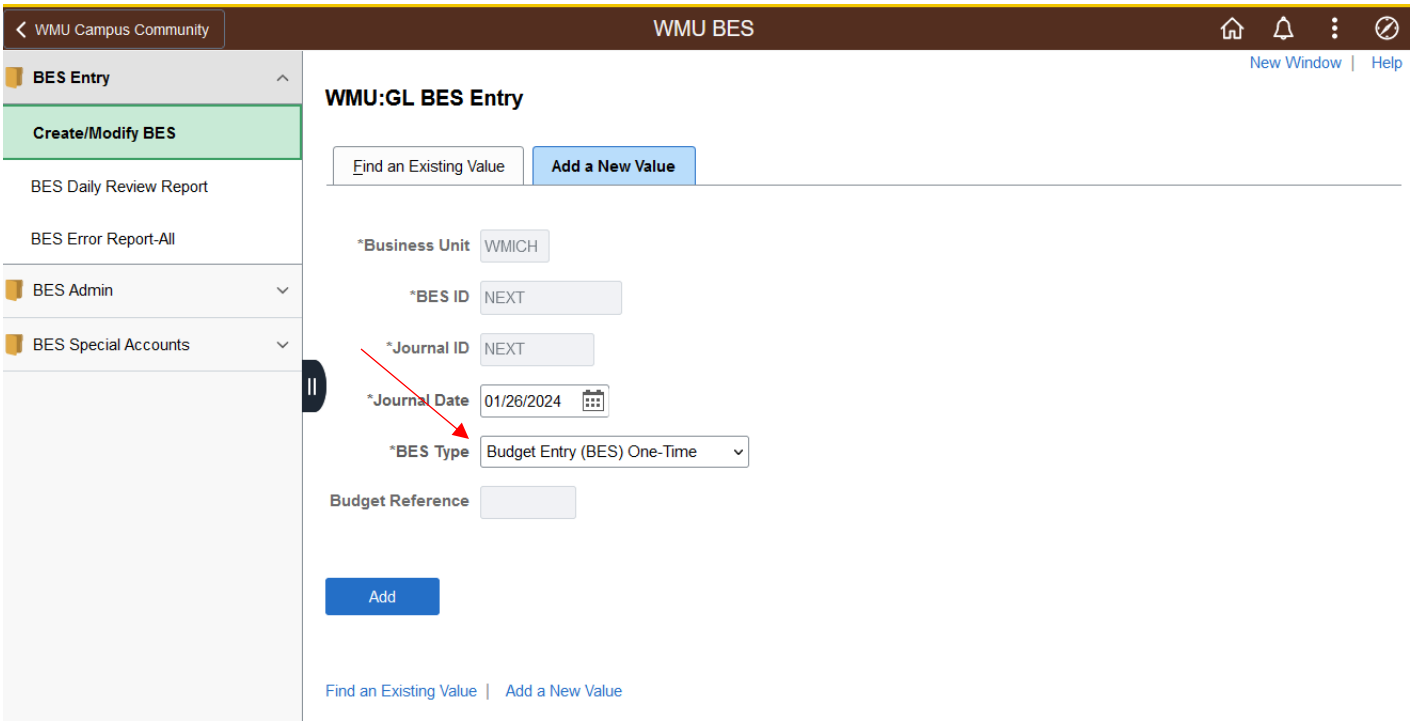
- Next, select WMU Campus Community.



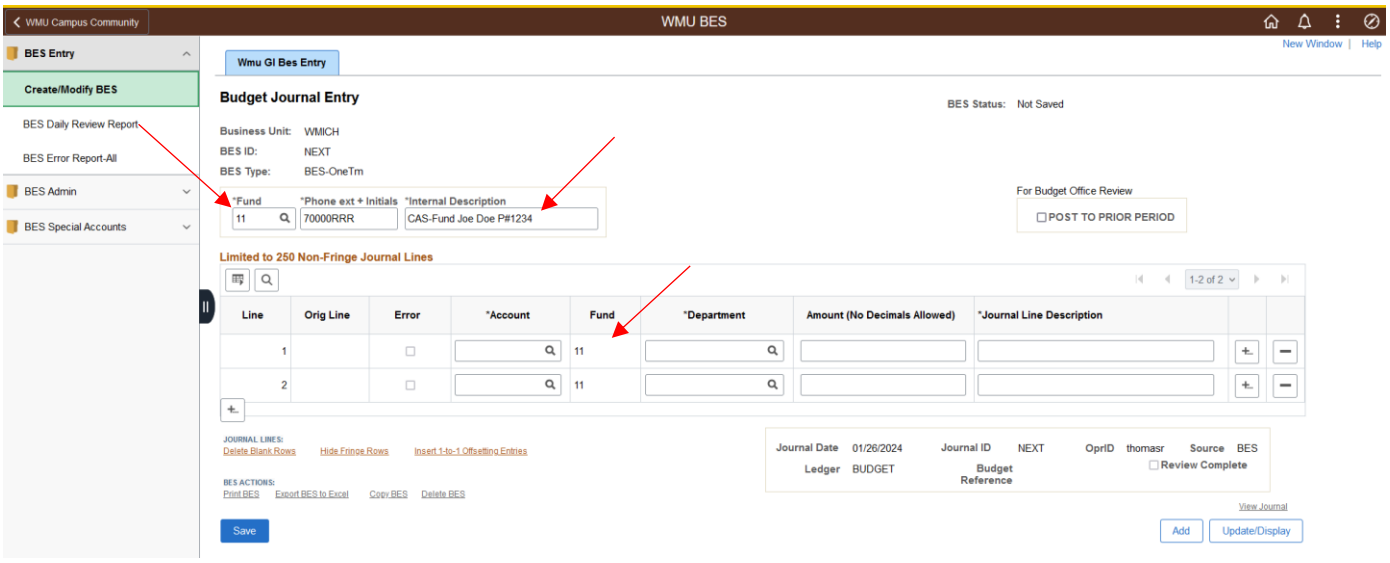
- You will then see the tiles for which you have access. Select the BES tile.



- 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.

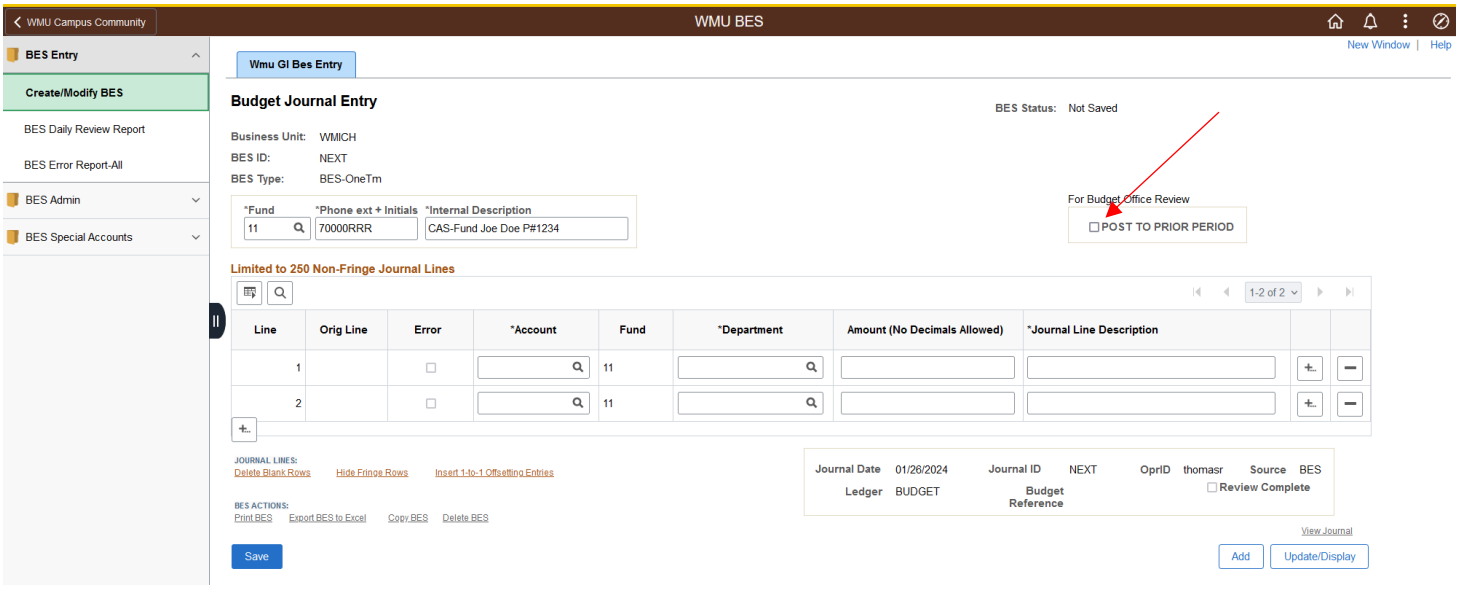


- All budget adjustments must occur within one fund. Once you've selected the fund, it will appear in the journal rows in the fund column.
- Enter your 5-digit phone number and 3 initials.
- Enter your BES journal description, which should include your department name or Abbreviation. This will help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

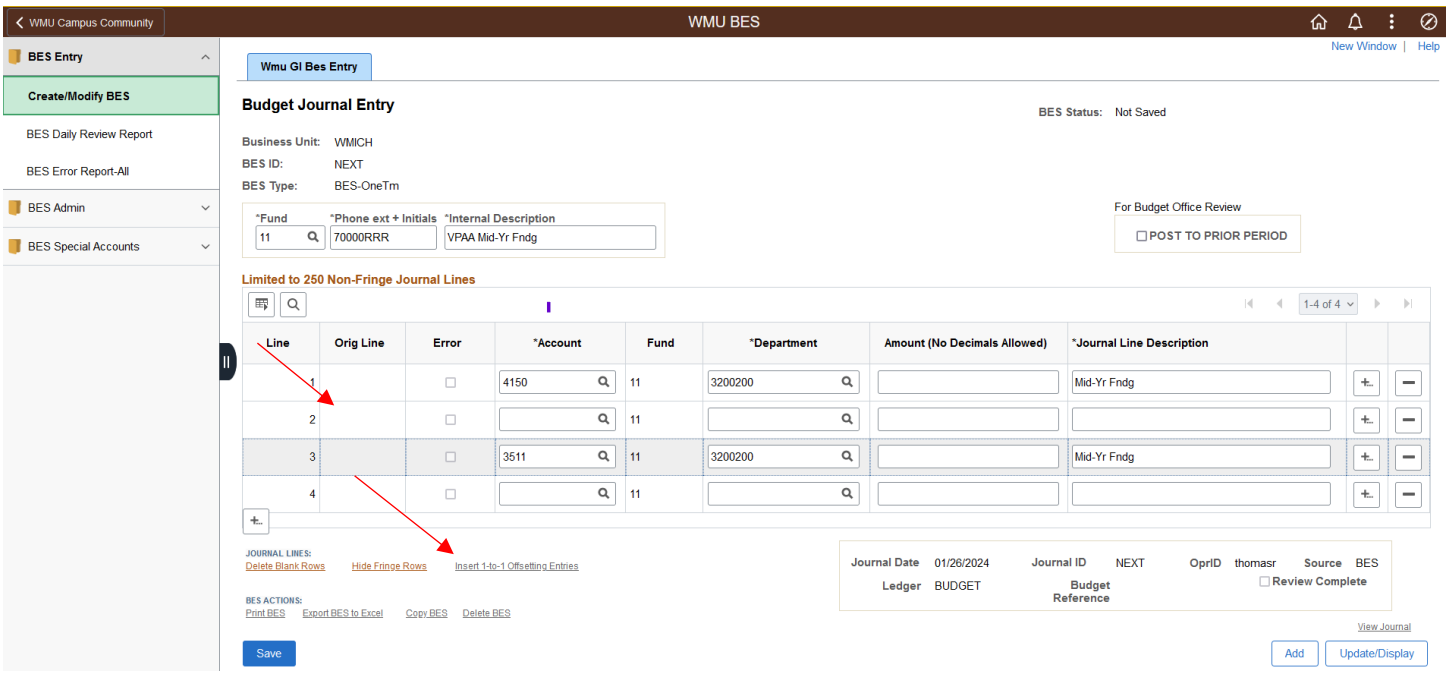


- Enter your journal lines as necessary. The amount column should be entered as whole numbers (no decimals)

- 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.

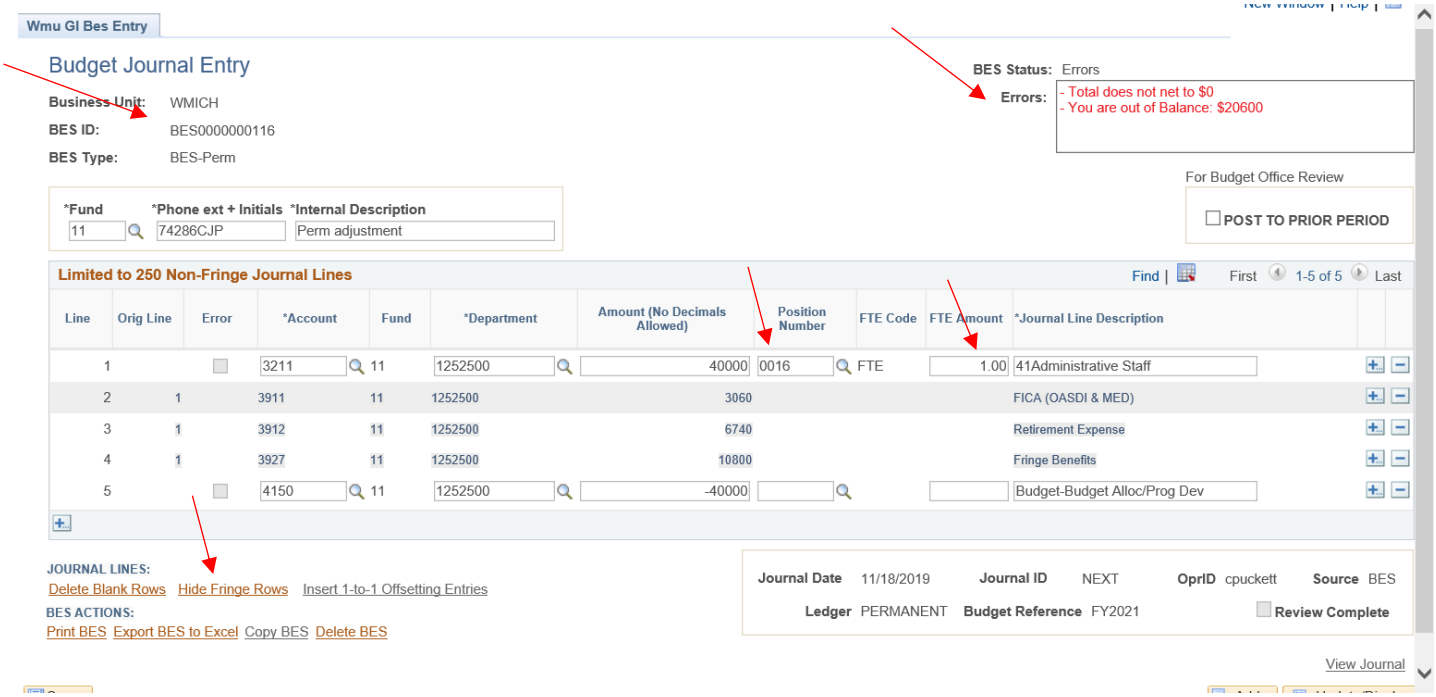


- You may select "Insert 1-to-1 Offsetting Entries to add an offset line equal to your original line(s).
  - You will need to add the object code and may adjust other fields as needed.
  - This feature can only be used once in a journal.

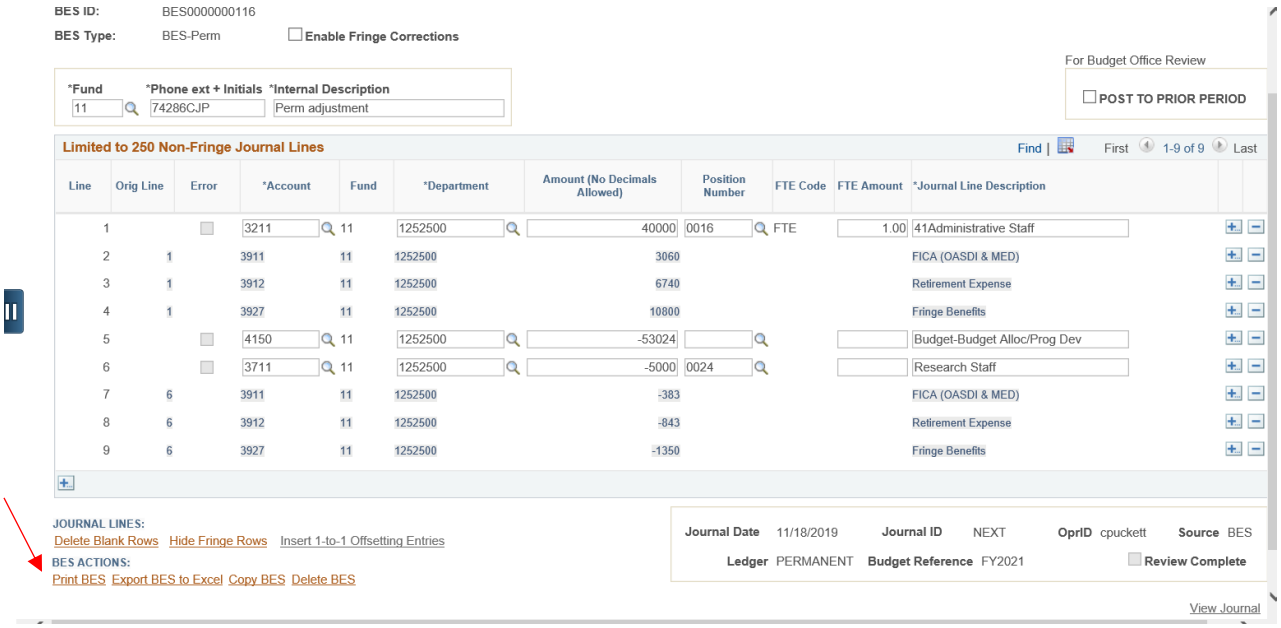


- Fringes will automatically calculate upon saving your BES.

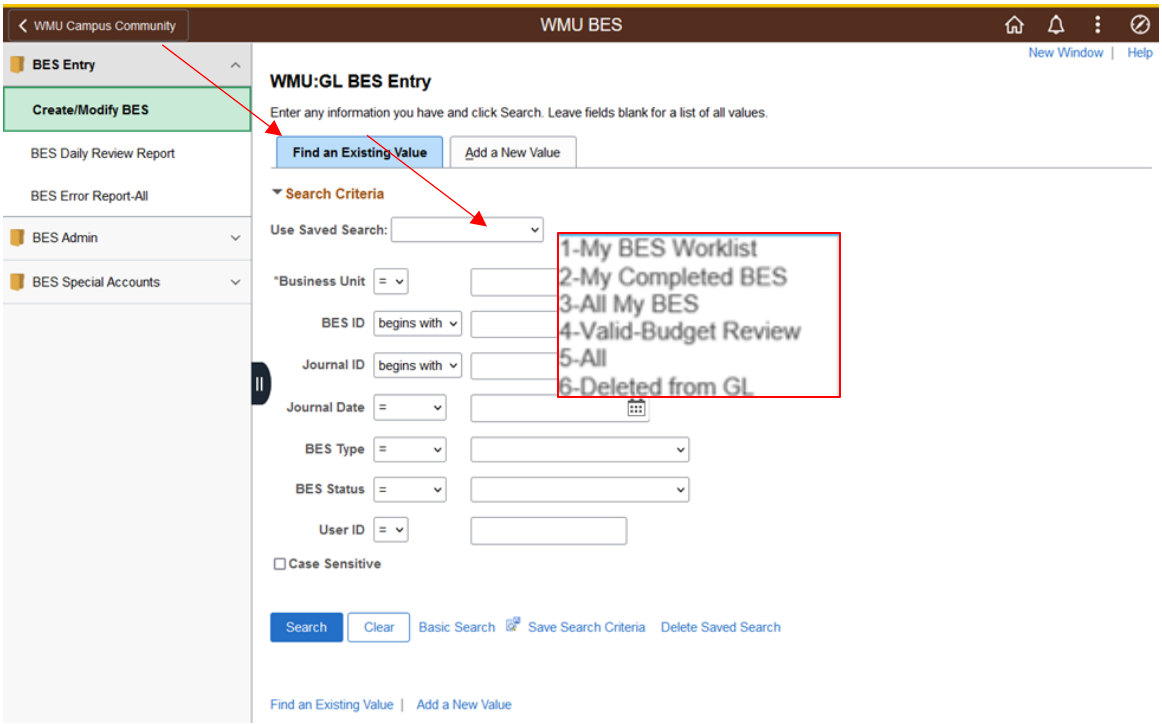
- Your journal will save with a unique BES ID, even if your journal is out of balance.
- You will need to correct any errors before the BES will post.
- A four-digit position number is required for all regular faculty and staff positions.
- The FTE amount field is available when entering a permanent 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.



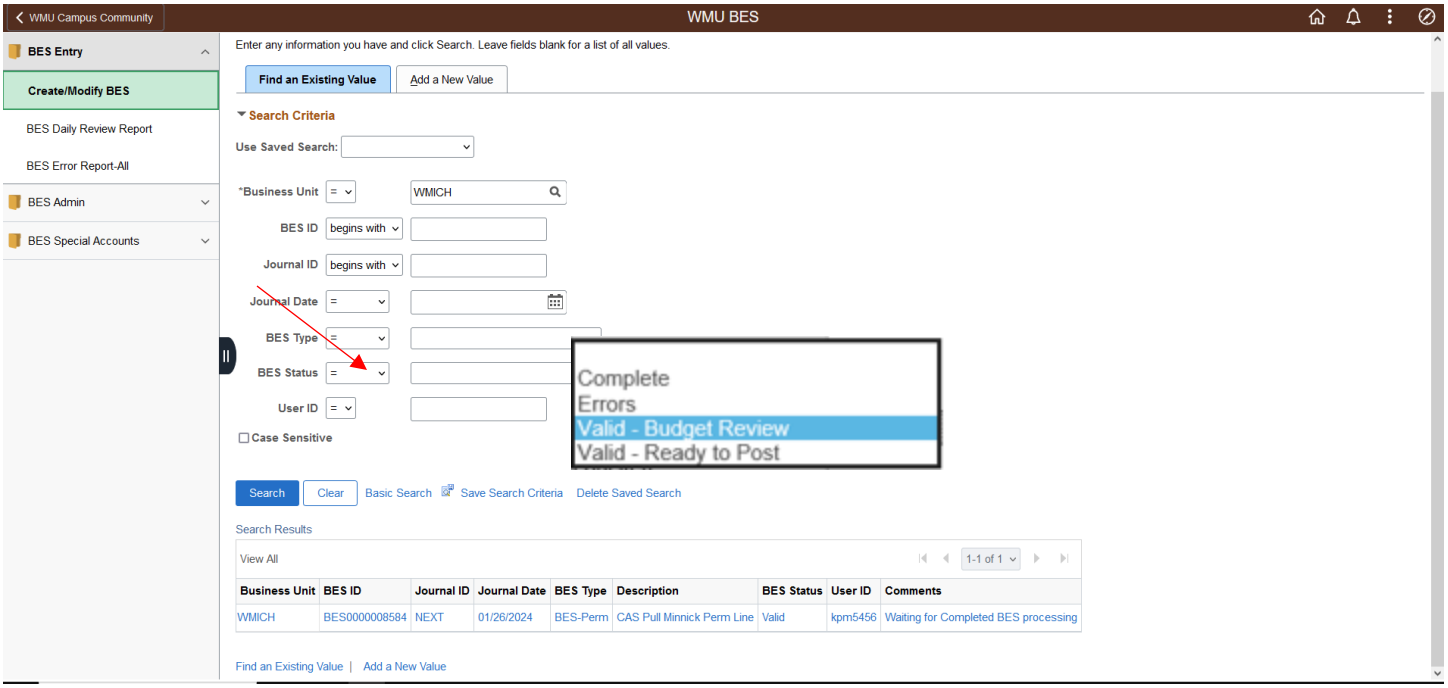
- Once you've saved your journal and corrected any errors, you may either Print your BES or Export it to Excel. You may also copy a BES. When copying a journal, you may adjust lines and dollar amounts as necessary, then save.

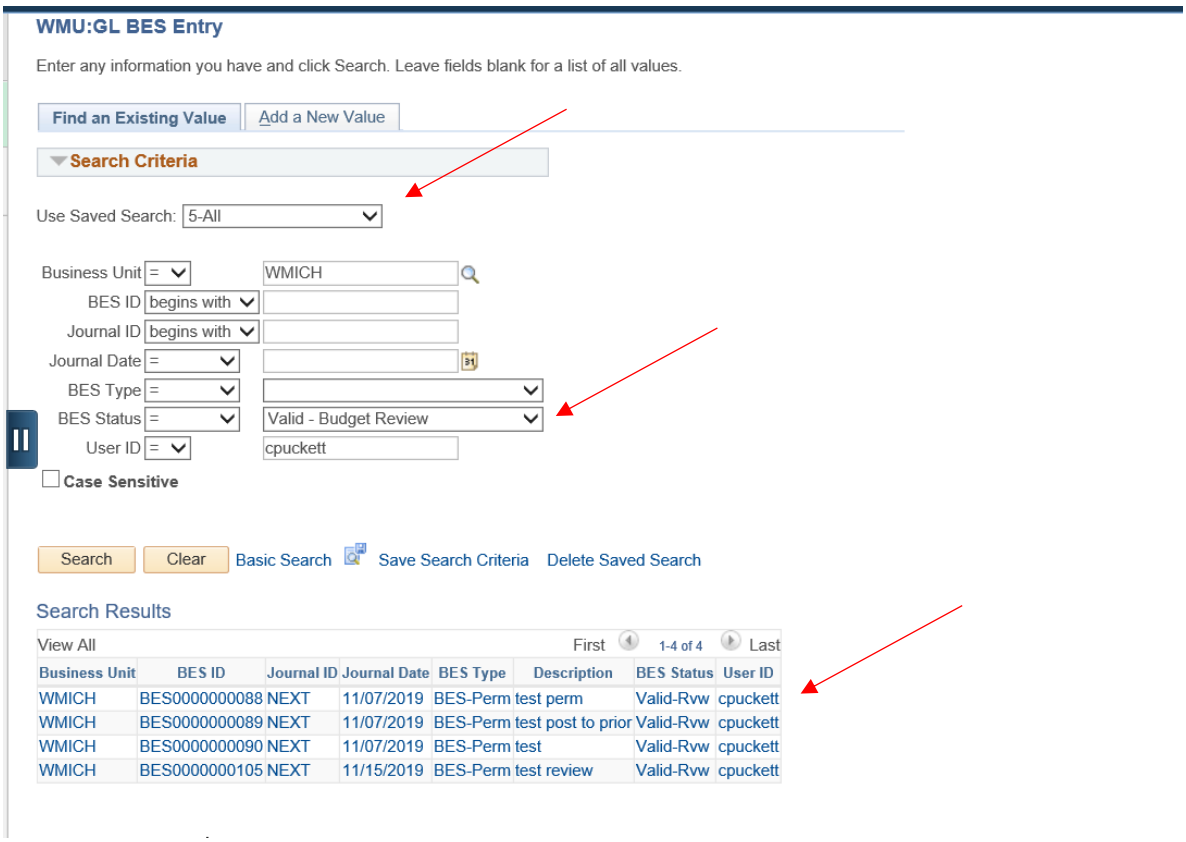


- You may search your BES to make a change or check the status.
- Using the “Saved Search” you have 6 different search options.



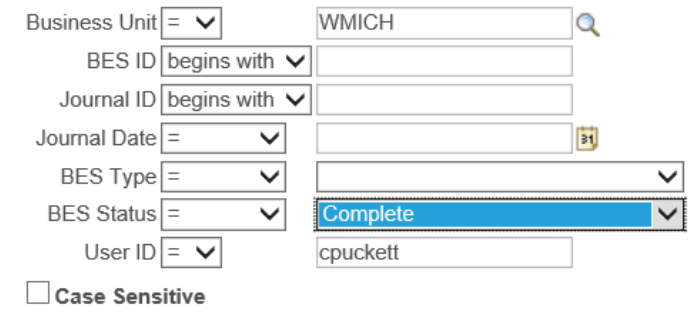
- BES Status gives you 4 additional search options.
- Your journals will be listed below your selection criteria.

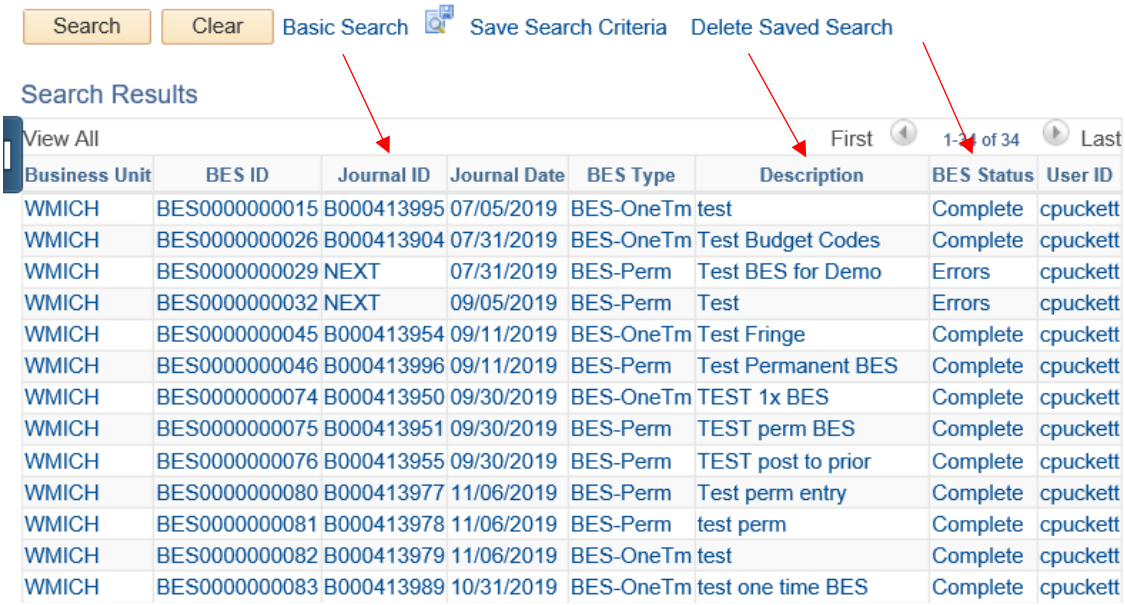




- A status of “Valid – Budget Review” means that the BES will not post until the Budget Office reviews it. (This is for ALL permanent budget entries and one-time entries with “post to prior period” selected.)
- A status of “Errors” means the BES has errors that need to be corrected by the user before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