

OFFICE OF UNIVERSITY BUDGETS AND FINANCIAL PLANNING

WMU BUDGET REPORTING INSTRUCTIONS

(FOR THE WEB)

The WMU budget reporting panel provides reports designed to help departments track their permanent budgets.

The following reports are currently available on the WMU budget reporting panel:

Personnel List – Used to compare employee job data to permanent budget by position.

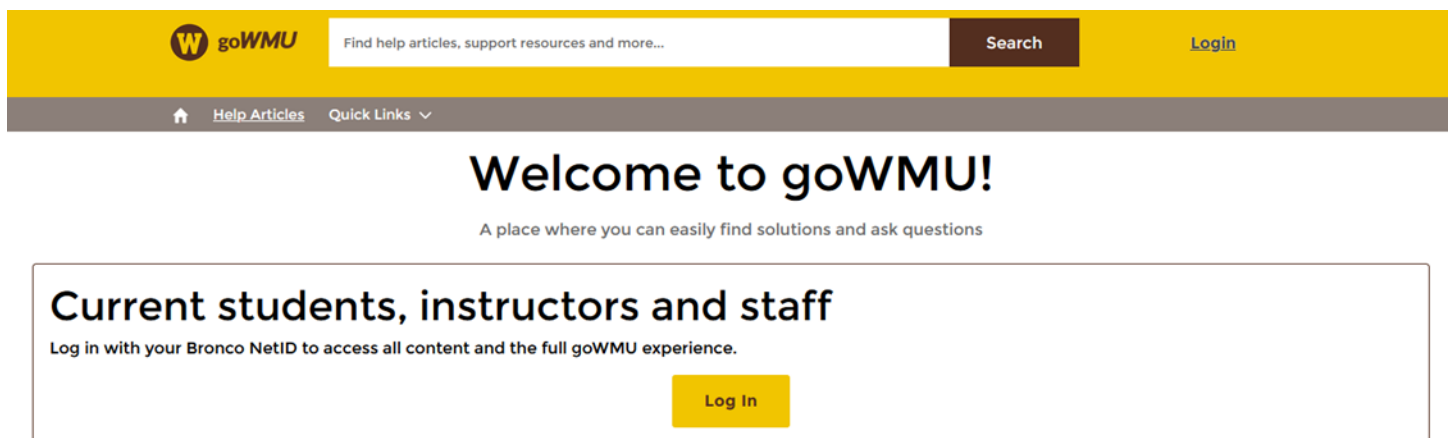
Permanent Base Budget Summary – Provides a summary of the permanent budget by account for each department.

Permanent Base Budget Detail – Provides a detail listing of all permanent budget adjustments by position and account for each department.

Reallocation Data Comparison – Preliminary base budget with 3 years of actual history for budget planning analysis.

To gain security to WMU budget reporting you will need to request authorization. See <http://wmich.edu/budget/resources> for an authorization form. If you have any problems accessing the site, please contact University Budgets at 7-4275.

To access the budget reporting please log into GoWMU using your **bronco net id**. You will find a link to GoWMU on the WMU home page or you may also access the following web address: <https://go.wmich.edu>.



The screenshot shows the goWMU website interface. At the top is a yellow header with the goWMU logo on the left, a search bar in the center, and a 'Login' link on the right. Below the header is a dark grey navigation bar with a home icon, 'Help Articles', and 'Quick Links' with a dropdown arrow. The main content area features a large heading 'Welcome to goWMU!' and a subheading 'A place where you can easily find solutions and ask questions'. Below this is a white box with a black border titled 'Current students, instructors and staff'. Inside this box, it says 'Log in with your Bronco NetID to access all content and the full goWMU experience.' and there is a yellow 'Log In' button.

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.



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



Search

[Rose Th...](#)

- [Home](#)
- [Apps](#)
- [Help Articles](#)
- [Support Cases](#)
- [Notification Groups](#)
- [Quick Links](#)

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

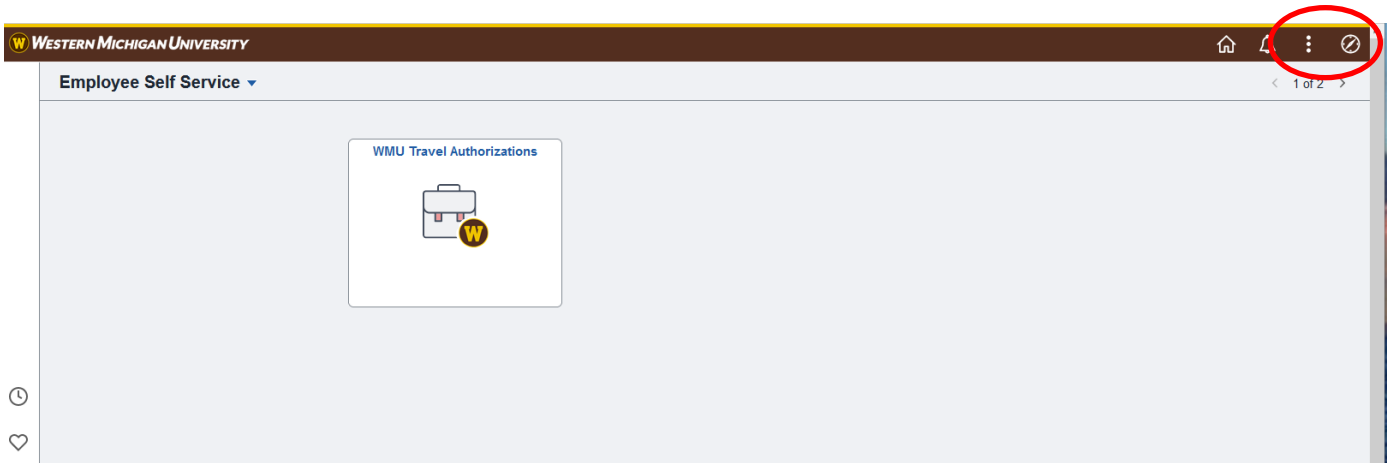
Requires [VPN](#) if off-campus



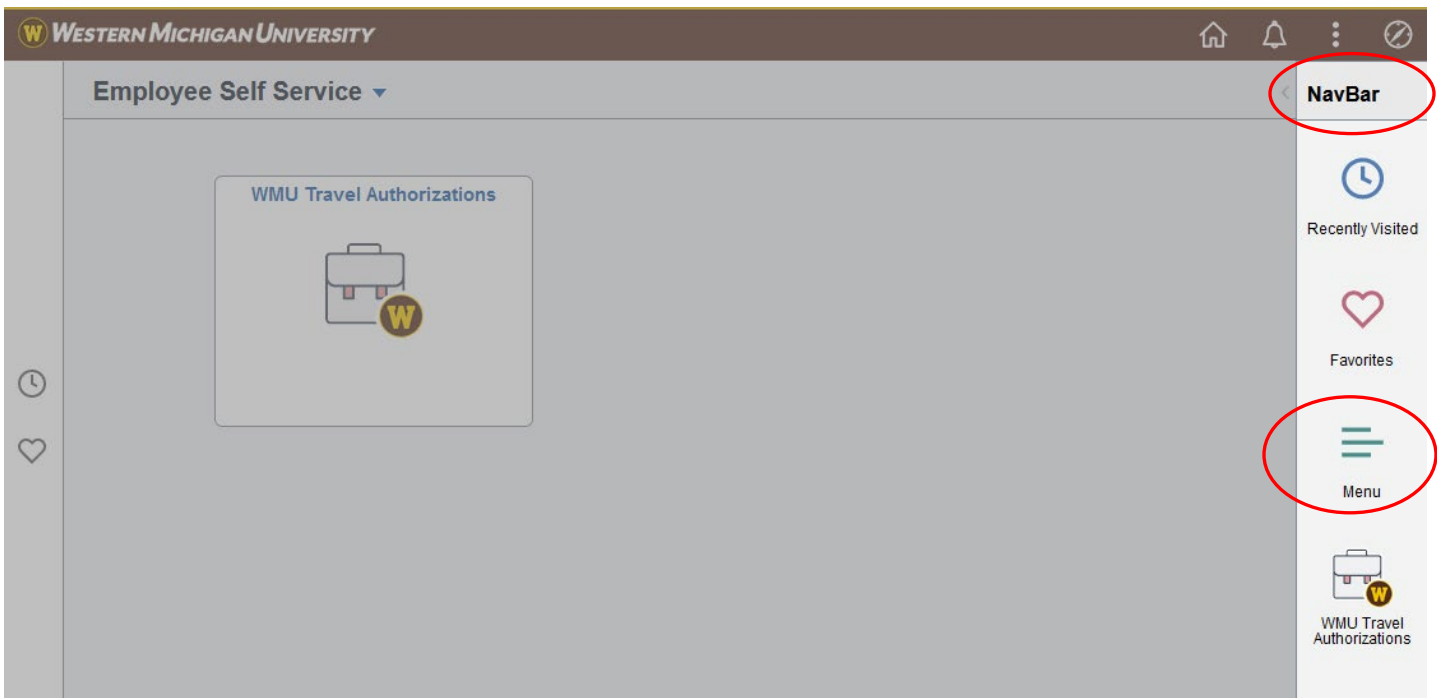
PeopleSoft HR

Requires [VPN](#) if off-campus

Once you have successfully logged in **using your bronco net id and password**, this is the first panel that will appear. To locate the navigation menu, select the icon in the upper right-hand corner that looks like a clock (or compass).

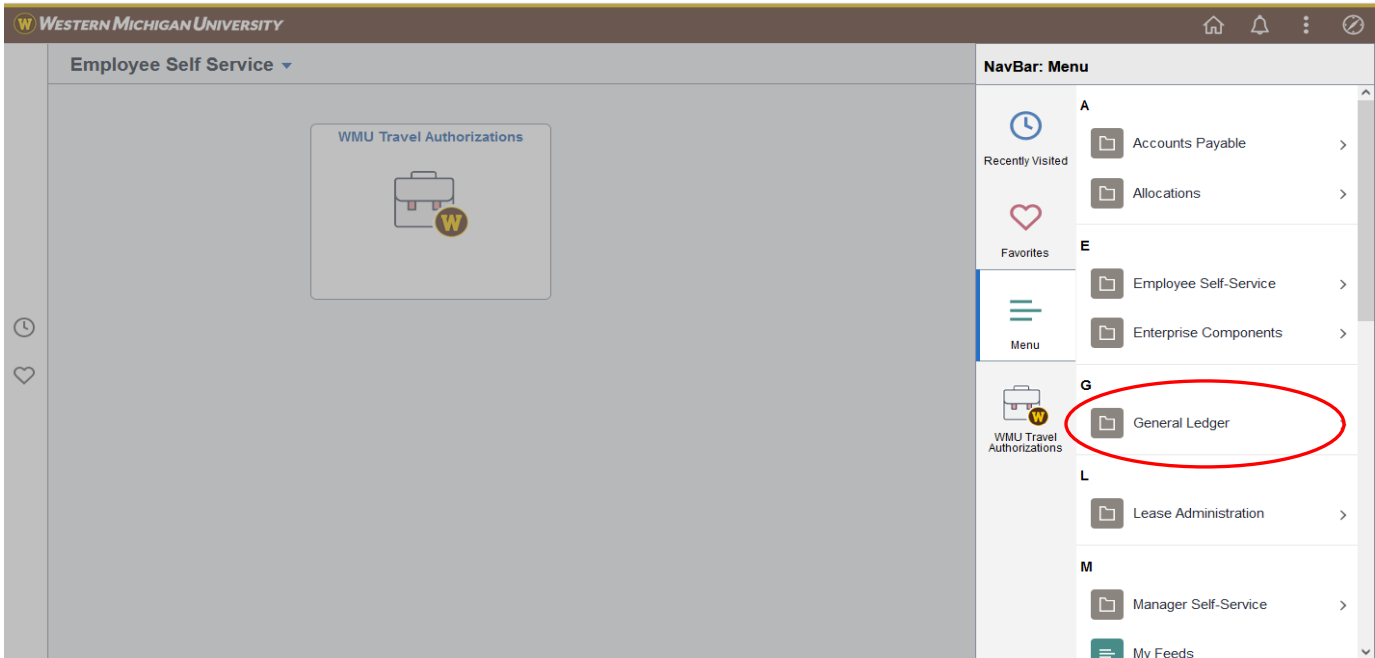


The navigation bar will appear as a vertical bar on the right-hand side of the screen. Please select the navigator button.



Please follow the path listed below by clicking on each option.

General Ledger > General Reports > WMU: Budget Reporting

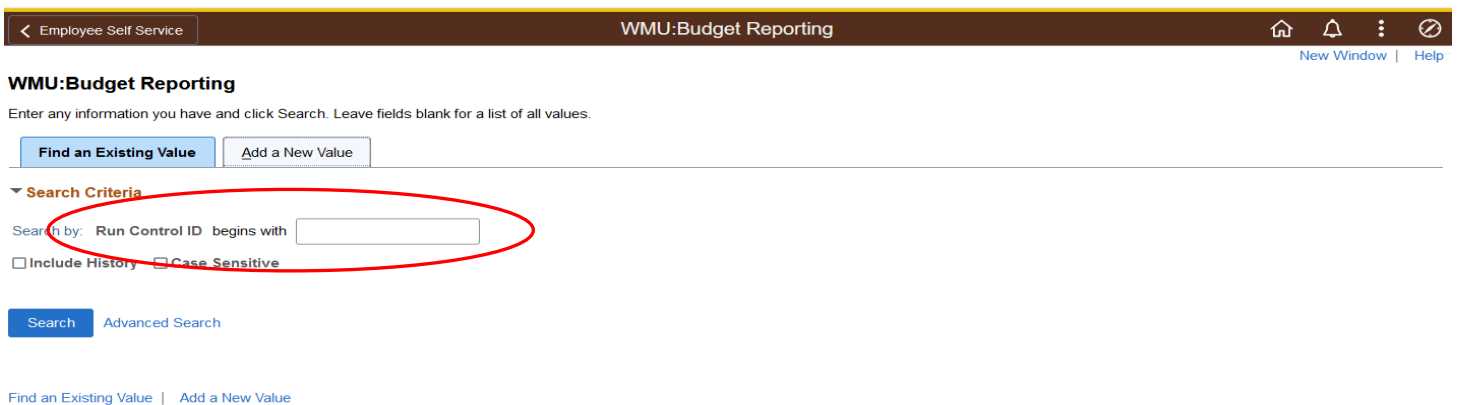


RUN CONTROL ID PANEL:

This will bring you to the Run Control Id screen. **If this is the first time you have accessed WMU budget reporting, you must click on the "Add a New Value" tab.** Please use your three initials (example: Bob M. Smith - bms) as your run control id. After entering your initials select the add button. Please keep in mind that you only need to add a new value the first time you access WMU budget reporting. **Once you have created your run control id, the next time you access WMU budget reporting you will not click on add a new value.** You will simply enter your run control id on the "Find an Existing Value" tab and select the search button (see previous page).

Your run control id will always be your initials regardless of the department you are requesting data for.

SIGN ON PANEL:



This brings you to the sign on panel. The first step is to enter the tree node name and password that have been issued by the Budget Office specifically for your area and then select the sign in button.

Please note: Tree nodes are specific to a particular VP, college or area. The nodes contain all departments that belong to a VP, college or area within a particular fund. Therefore, if your area contains fund 11, 23 and 24 departments you will have a minimum of 3 tree nodes. Your password for each node will remain the same. For example, if you wish to access records for your fund 11 you would enter your fund 11 tree node with your password. If you then wish to access records for your fund 23 you would enter your fund 23 tree node along with the same password.

If the tree node and password are valid the remaining criteria options will appear.

The screenshot shows the top navigation bar with 'Employee Self Service' and 'WMU:Budget Reporting'. Below the navigation bar, there is a 'Run Control ID' field with the value 'rmi'. To the right are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Tree Node:' label is next to an empty text input field, which is circled in red. To its right is a 'Sign On' button, also circled in red. Below these is a 'Parameters' section with a large empty text area. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'.

1. Enter the tree node name (sent with authorization confirmation).
2. Click the Sign On button to populate the boxes to enter your parameters.

This screenshot shows the same interface as the previous one, but after the 'Sign On' button has been clicked. The 'Tree Node:' input field now contains the text '11-XXX-XXX'. The 'Parameters' section is now expanded, showing three input fields: 'Budget Reference:', 'WMU Begin DeptID:', and 'WMU End DeptID:'. The 'Sign On' button is still present. The bottom navigation buttons remain the same.

PARAMETER PANEL:

When this screen appears, you may enter the criteria that you wish to view on your report. There are a couple of different options you may choose.

On July 1 or the date the budget was booked, your permanent or base budget became your one-time budget that you see on GLOW. Using that base budget as a starting point we begin building the permanent budget for the following fiscal year. **Budget Reference refers to the fiscal year we are building not the fiscal year we are currently in.** For example: When the budget was booked for 22/23, we began using budget reference FY2024 to build the budget for 23/24. Upon completion of booking 23/24, we began using budget reference FY2025.

Please note: The personnel report should only be run using the most current budget reference. The employee data from Human Resources will always be the most current information.

The Budget Reference field always begins with "FY" followed by the 4-digit year. For example: FY2025 would need to be used when running budget reports to pull in all the entries made since the current year was booked.

The screenshot shows the 'WMU:Budget Reporting' interface. At the top, there is a navigation bar with a back arrow, 'Employee Self Service', 'WMU:Budget Reporting', and icons for home, notifications, and help. Below the navigation bar, there is a 'Run' button and a 'Sign On' button. The 'Parameters' section contains three input fields: 'Budget Reference:', 'WMU Begin DeptID:', and 'WMU End DeptID:'. The 'Budget Reference:' field is circled in red. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'.

You begin by entering the budget reference. (Please see previous page for explanation of budget reference.)

You must then enter the begin and end department id for which you are requesting data. You may enter a range of departments – for example: begin deptid is 1210000 and end deptid is 1219999. You may also get data for one department by keying the same department id in both the "begin and end" fields. Another option, as indicated in the example below, is to enter all zeros in the begin deptid field and all nines in the end deptid field. This option will give you all departments that are associated with your tree node.

Please remember that you will only get departments that are associated with the tree node you have entered. The tree nodes are specific to a fund. Therefore, it is necessary to complete this process multiple times if you are trying to get data for several funds, as you will have different tree node names for each fund assigned to your area.

Once you have filled in the desired criteria, you must click on the save button. Once the information is saved, you can select the run button.

1. Enter Budget Reference.
2. Enter begin and end department id.
3. Select the Save button.
4. Select the Run button.

PROCESS SCHEDULER REQUEST PANEL:

Selecting the run button brings you to the process scheduler request panel. It is at this panel you must select the report you wish to run. Select the report by checking the box next to the report description.

Please note that the server name must be PSUNX. If this is not displayed in the box please use the drop down arrow next to the box to select the server PSUNX.

You will notice that next to each report description is a process name. (WMUBD008, WMUBD018, WMUBD027, and WMUBD045) These process names will be needed to locate the report to print.

Process Scheduler Request

User ID reb6285 Run Control ID smk

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Personnel List	WMUBD008	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Permanent Base Budget Summary	WMUBD018	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Permanent Base Budget Detail	WMUBD027	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Reallocation data comparison	WMUBD045	SQR Report	Web	PDF	Distribution

1. Using the drop down box, select PSUNX as the Server Name.
2. Check the report you wish to run.
3. Select the report format.
4. Select the OK button.

Process Scheduler Request

User ID thomasr Run Control ID rmt

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Personnel List	WMUBD008	SQR Report	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Permanent Base Budget Summary	WMUBD018	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Permanent Base Budget Detail	WMUBD027	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Reallocation data comparison	WMUBD045	SQR Report	Web	PDF	Distribution

RUNNING TO PDF:

Please note that the report type defaults to "web" and the report format defaults to "PDF." These defaults will create a clear, formatted report that is easy to read. However, you must have Adobe Acrobat Reader to view your report. If you do not have access to Adobe you may be able to download a free copy from the Adobe website.

RUNNING TO EXCEL:

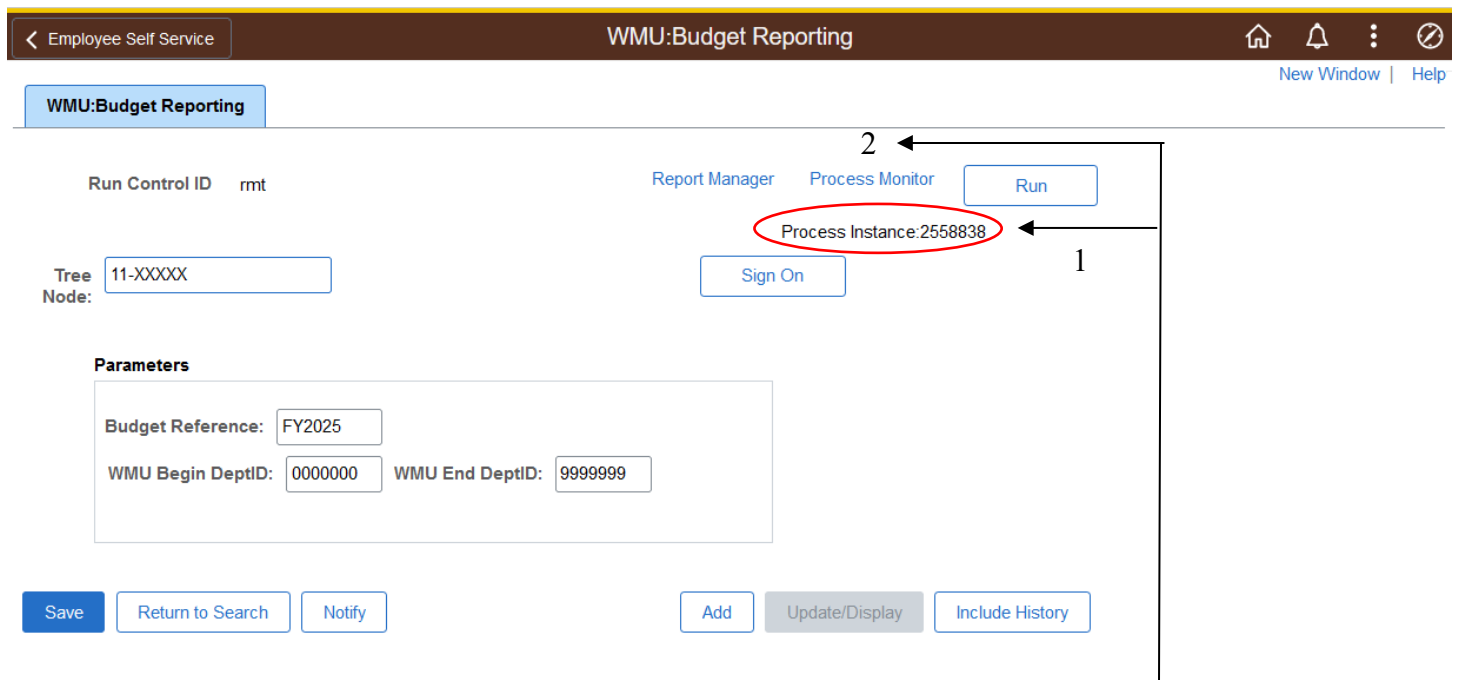
You may also at this time choose to run your report to excel. (Please note that although this function does create an excel file that is editable, it does require some cleanup by the user as all headings and titles may not come through clearly.) If you would like to use this option, change the type to web and change the format to CSV.

After checking the box for the report, you wish to run, select the OK button.

PARAMETER PANEL WITH PROCESS INSTANCE INFORMATION:

This will bring you back to the WMU:Budget Reporting panel. In the right hand corner under the run button your will see your process instance number. You will need to reference this number to print the correct report.

Select the blue "process monitor" option next to the run button.



The screenshot shows the WMU:Budget Reporting interface. At the top, there is a navigation bar with "Employee Self Service" and "WMU:Budget Reporting". Below this, there is a "Run Control ID" field with the value "rmt". To the right of the "Run Control ID" field, there are three buttons: "Report Manager", "Process Monitor", and "Run". The "Process Monitor" button is circled in red, and an arrow labeled "2" points to it. Below the "Process Monitor" button, there is a text field containing "Process Instance:2558838", which is also circled in red. An arrow labeled "1" points to this text field. Below the "Process Instance" field, there is a "Sign On" button. Below the "Sign On" button, there is a "Parameters" section with three input fields: "Budget Reference:" with the value "FY2025", "WMU Begin DeptID:" with the value "0000000", and "WMU End DeptID:" with the value "9999999". At the bottom of the interface, there are several buttons: "Save", "Return to Search", "Notify", "Add", "Update/Display", and "Include History".

1. Note the process instance number.
2. Select Process Monitor.

PROCESS/REPORT LIST PANEL:

If your userid is not indicated in the user id box please enter it there. This is the userid that you used to sign into PeopleSoft. Then select the yellow refresh button.

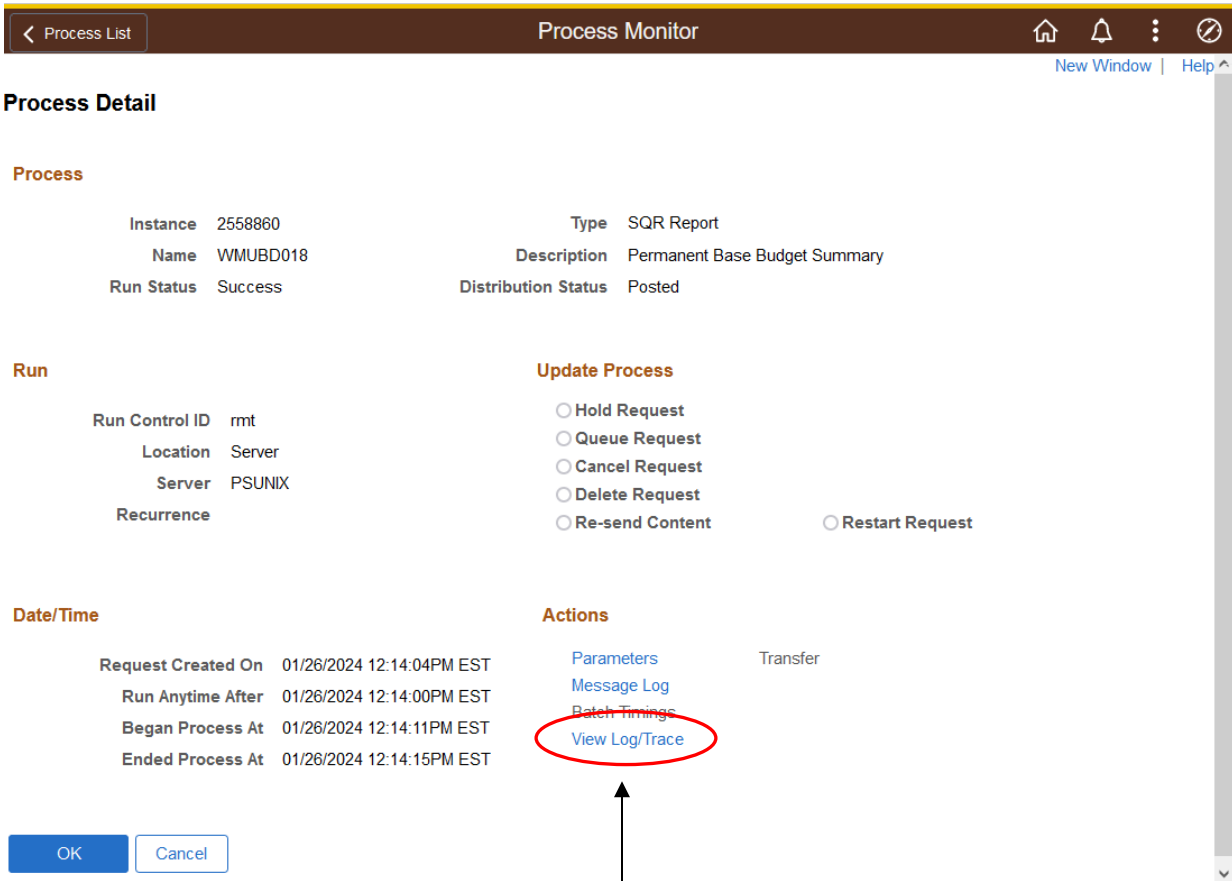
You should find the report that you just ran by referencing the instance number along with the process name. Check the run status. The report is not complete until the status changes to "Success." To update the status you must click on the yellow refresh button located in the top right hand corner of the panel. When the status indicates success select the process name.

The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below this is a 'View Process Request For' section with various filters and a 'Refresh' button circled in red and labeled '3'. Below the filters is a 'Process List' table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	2558844		SQR Report	WMUBD018	thomasr	01/26/2024 10:49:52AM EST	Success	Posted	Details	▼ Actions

Annotations: '1' points to the instance number '2558844', '2' points to the 'Success' status, and '4' points to the 'Details' link. A 'Refresh' button is circled in red and labeled '3'.

1. Locate the correct report using the process instance number.
2. Check the run status.
3. Select the Refresh button until the run status indicates "success."
4. Select details.



Then select the view log/trace.

1. Select View Log/Trace.

VIEW LOG/TRACE PANEL:

Select the PDF file and your report will appear on the screen. Again, you must have Adobe Acrobat Reader to view your report. If you do not have access to Adobe you may be able to download a free copy from the Adobe website.

Process Monitor

View Log/Trace

Report

Report ID 2520917 Process Instance 2558860 Message Log
 Name WMUBD018 Process Type SQR Report
 Run Status Success

Permanent Base Budget Summary

Distribution Details

Distribution Node PSUNIX Expiration Date 03/08/2024

File List

Name	File Size (bytes)	Datetime Created
SQR_WMUBD018_2558860.log	2,429	01/26/2024 12:14:15.374751PM EST
wmubd018_2558860.PDF	30,251	01/26/2024 12:14:15.374751PM EST
wmubd018_2558860.out	1,294	01/26/2024 12:14:15.374751PM EST

Distribute To

Distribution ID Type Distribution ID

User thomasr

Return

1. Select the PDF or CSV file.

In order to return to the criteria panel, either close out of the report or minimize the report window. This will bring you back to the view log/trace panel. Select the return button at the bottom of the panel. This will bring you back to the process detail panel. Select the cancel button at the bottom of the screen. This will bring you back to the process list. Select the blue option "Go Back to WMU:Budget Reporting" at the bottom of the panel. This will bring you back to a blank WMU:Budget Reporting panel.

WMU Budget Reporting | Process Monitor | New Window

Process List | Server List

View Process Request For

User ID: thomasr | Type: | Last: | 1 Days | Refresh

Server: | Name: | Instance From: | Instance To: | Clear

Run Status: | Distribution Status: | Save On Refresh: | Report Manager | Reset

Process List

1-6 of 6 | View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	2558844		SQR Report	WMUBD018	thomasr	01/26/2024 10:49:52AM EST	Success	Posted	Details	Actions

[Go back to WMU Budget Reporting](#)

Save | Notify

Process List | Server List

Please note that due to security reasons, the user will always return to a blank panel and will be required to enter their tree node and password again. You may enter the same tree node and password if you wish to run another report for the same departments or you may enter a new tree node.