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.

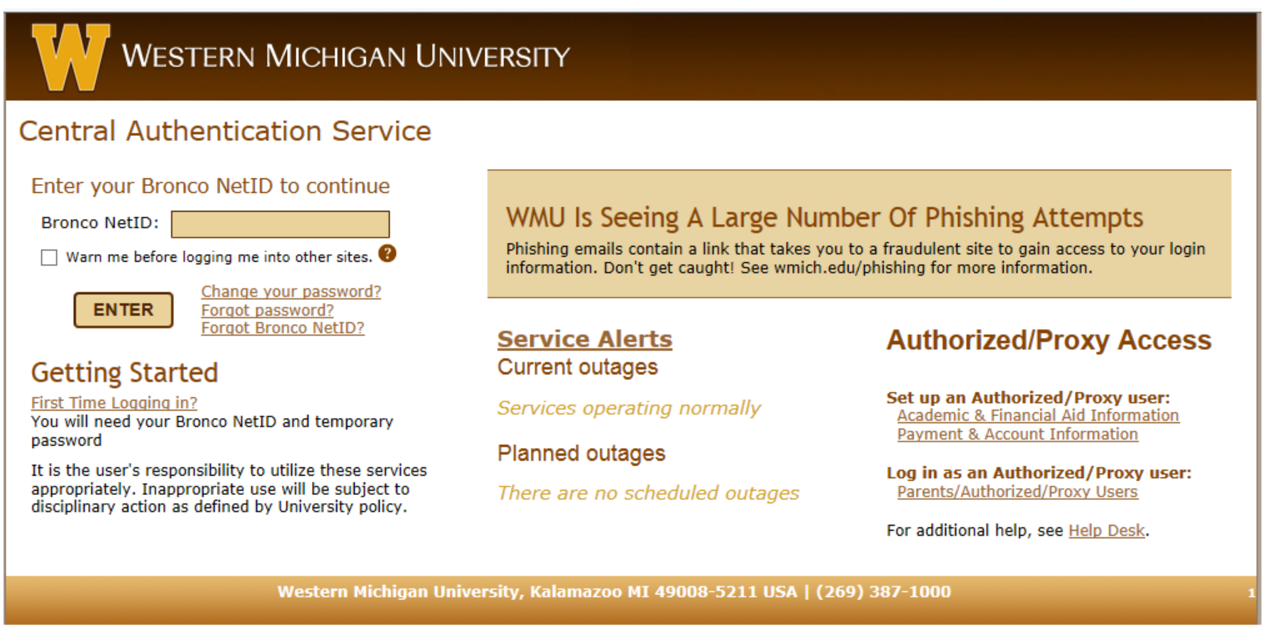
The following reports are currently available on the WMU budget reporting panel:

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.

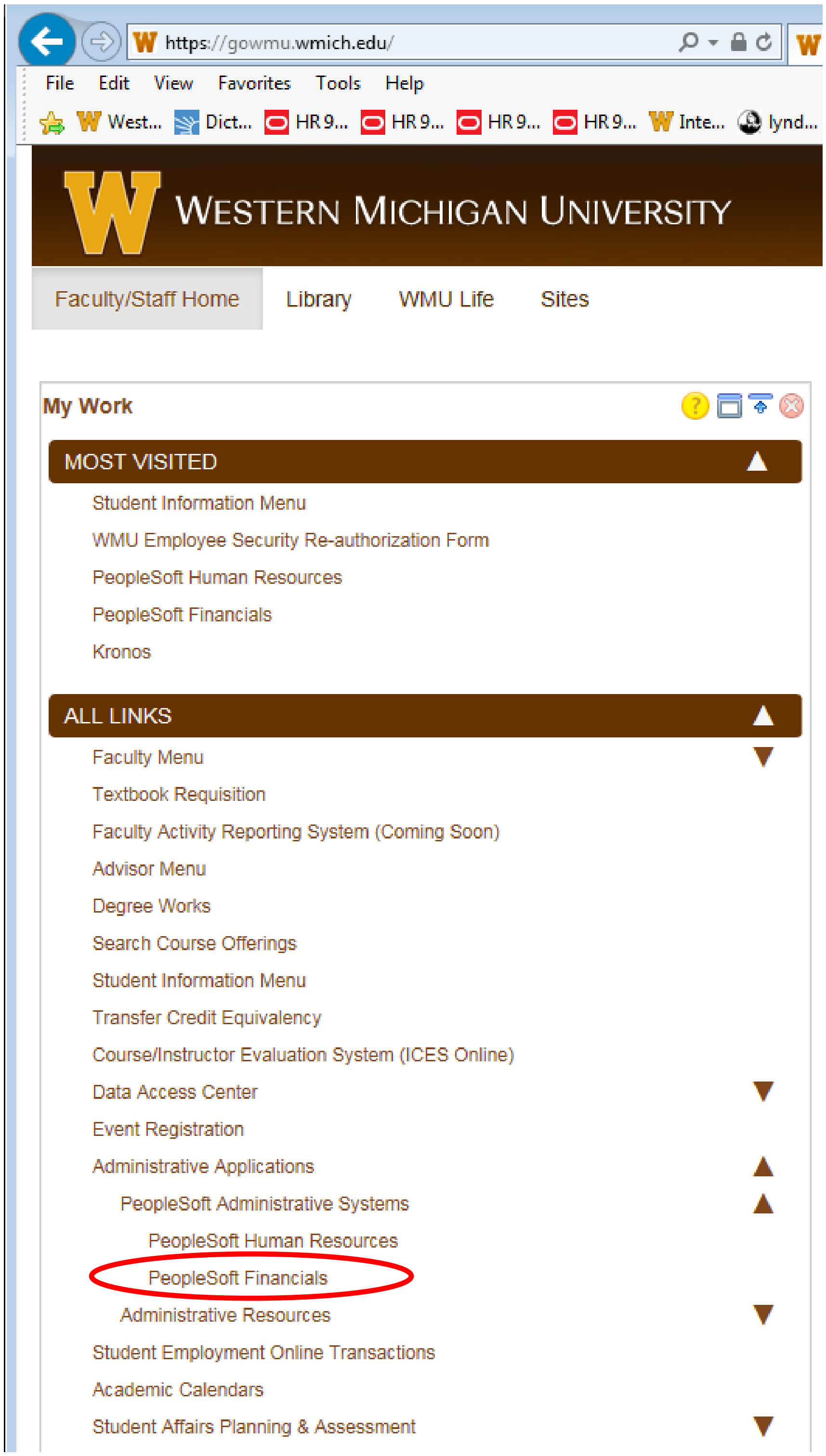
The reports have a couple of options including the ability to get information for a previous fiscal year.

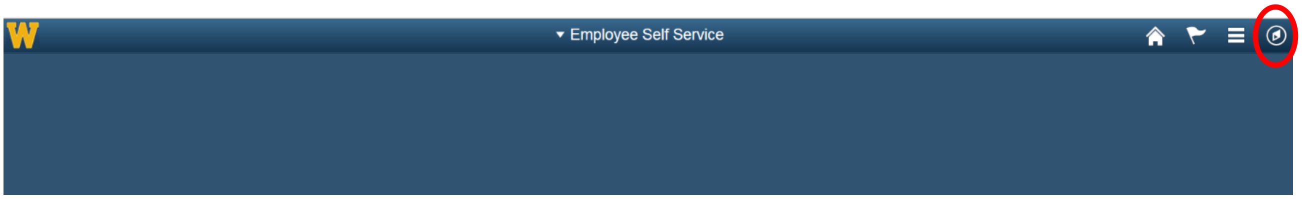
To gain security to WMU budget reporting you will need to request authorization. See http://wmich.edu/budget/resources for an authorization form. If you have any problems accessing the site, please contact Kathy Houser at kathy.houser@wmich.edu or 7-4286.

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://gowmu.wmich.edu.

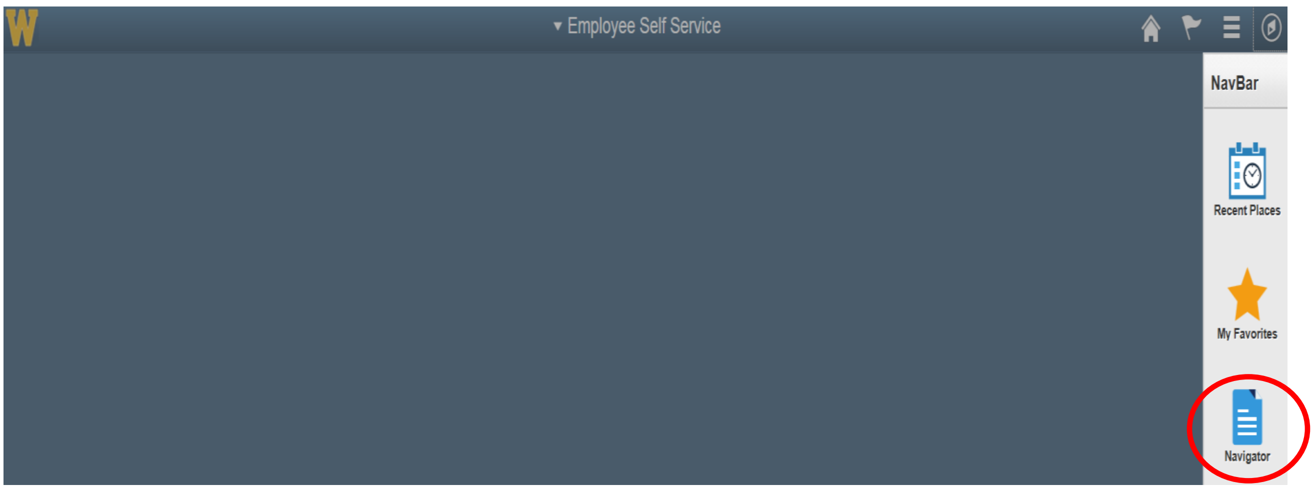


After logging into GoWMU, locate the "Faculty/Staff Home" tab on the left side of your screen. Under "My Work" click the down arrow for the ALL LINKS box and then select the down arrow next to Administrative Applications. Select the down arrow next to PeopleSoft Administrative Systems and select PeopleSoft Financials. You will be directed to PeopleSoft.

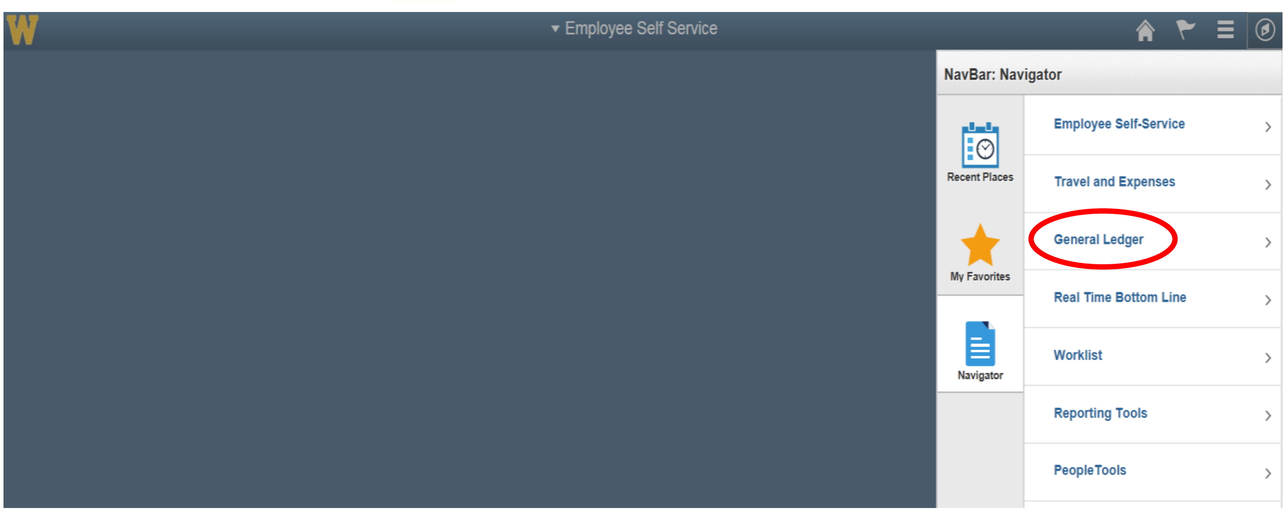




When you have successfully logged in, this is the first panel that will appear. To locate the navigation menu, select the icon in the upper right hand corner.



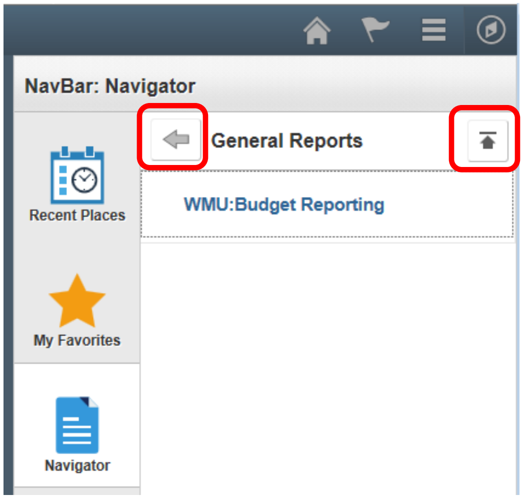
The navigation bar will appear as a vertical bar on the right hand side of the screen. Please select the navigator button.



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

Main Menu > General Ledger > General Reports > WMU:Budget Reporting

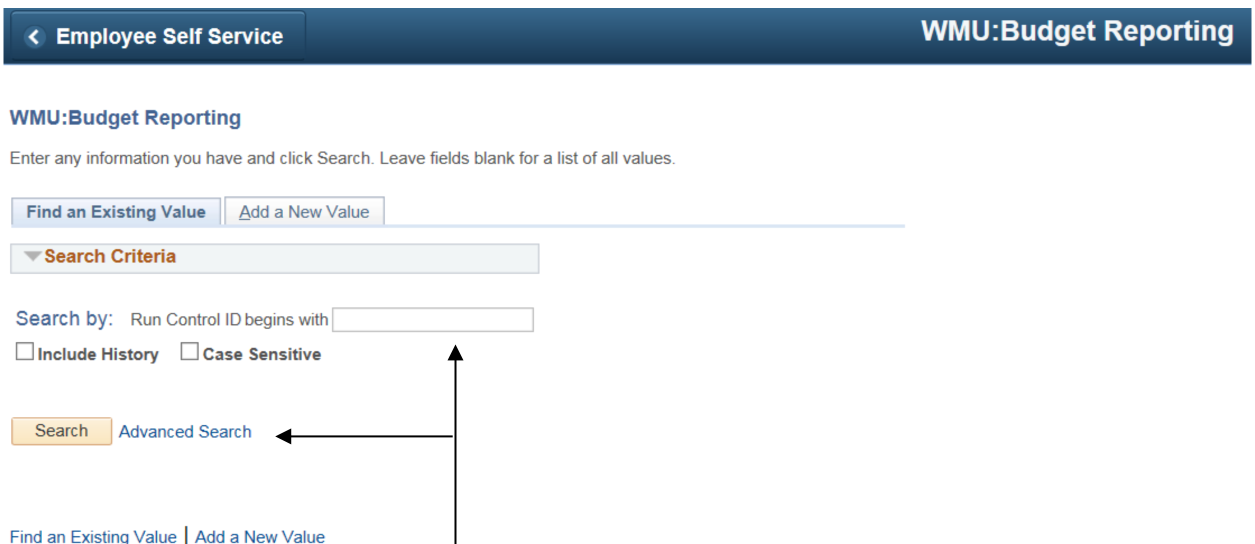
Note: For ease in navigating, the following options are available on the NavBar: Navigator:



The navigator bar toolbar has the following options:

Back Button - Moves the navigation menu back one level.

Main Navigation - Moves the navigation menu back to the beginning "Main Menu."

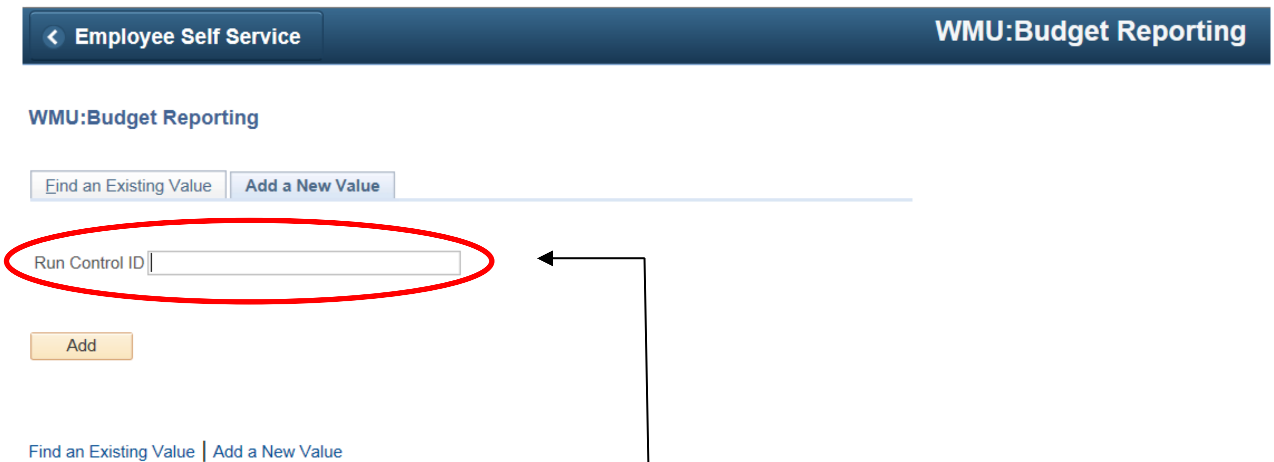


Enter your initials in the Run Control ID box and select the search button. If this is the first time you have accessed WMU budget reporting you must add a new run control id. Please see next page for instructions.

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.



When adding a new Run Control ID enter your initials in the Run Control ID box and select the add button.

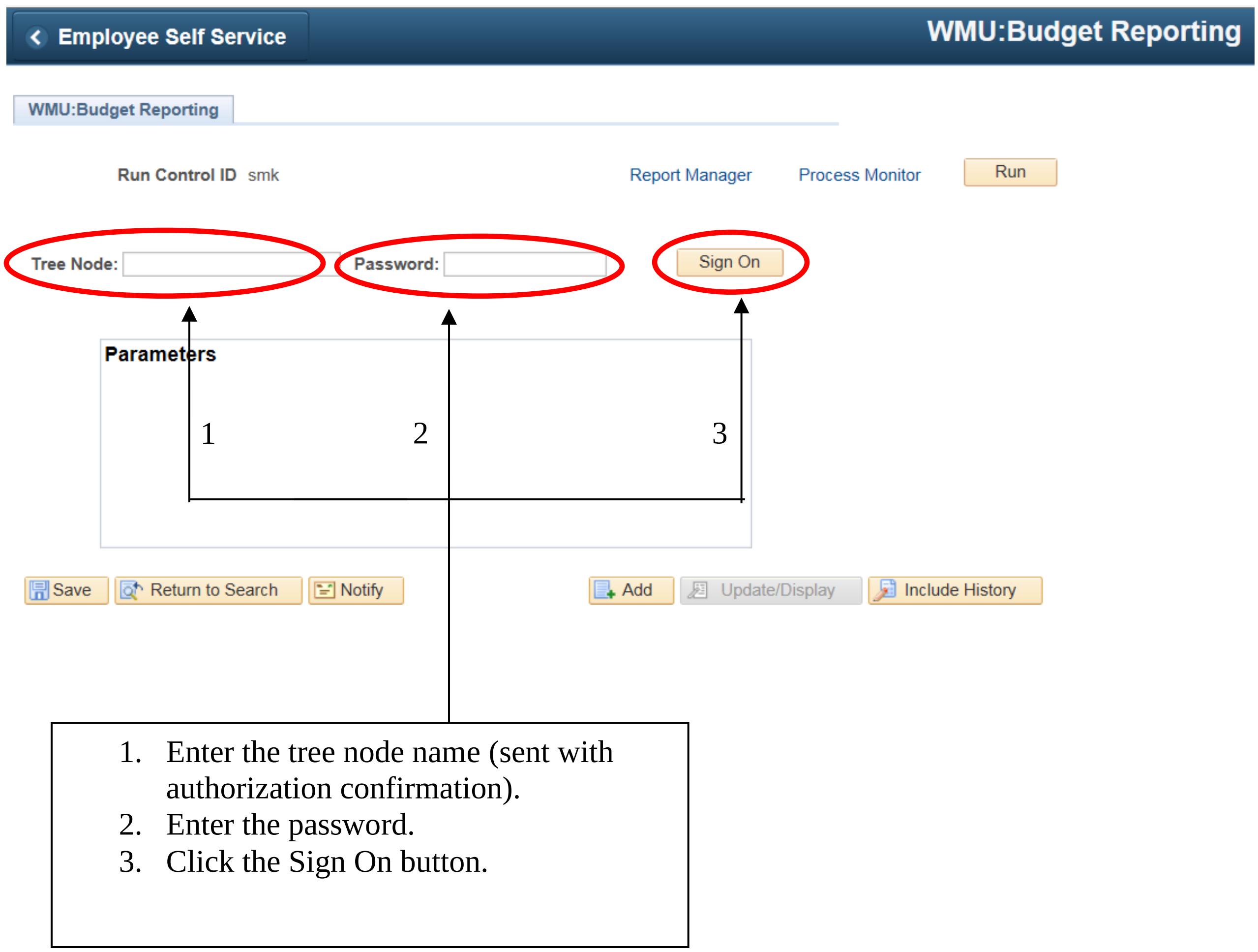
HINT: You only need to create a new Run Control ID once. It will be saved for future uses.

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.



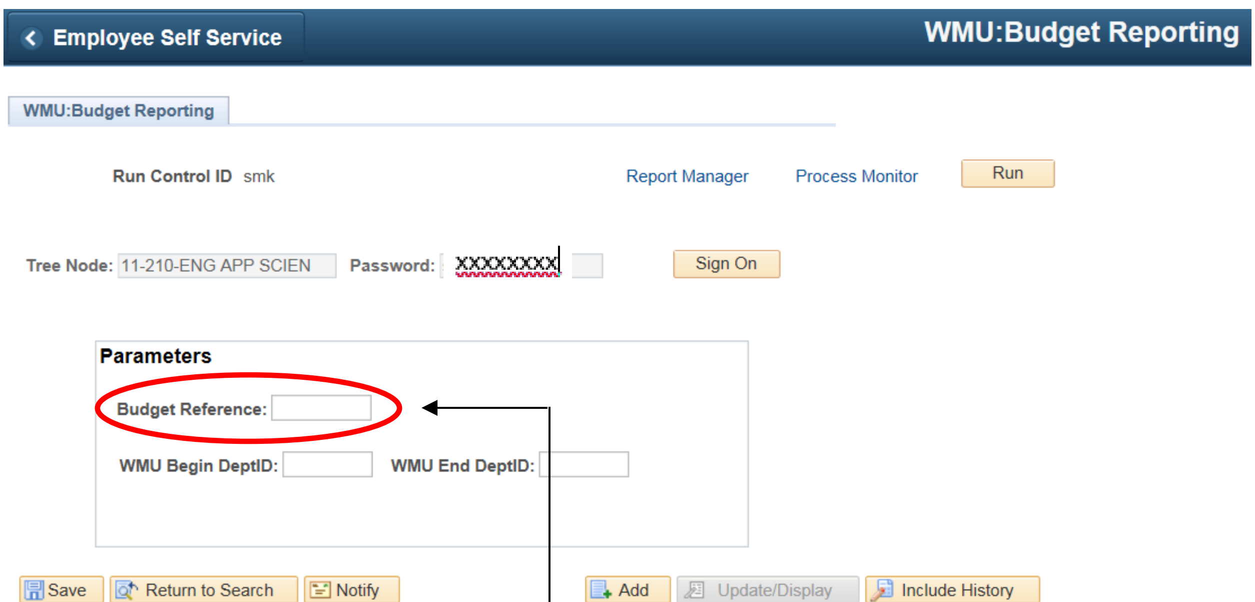
PARAMETER PANEL:

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 16/17, we began using budget reference FY2018 to build the budget for 17/18. Upon completion of booking 17/18, we will begin using budget reference FY2019.

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: FY2018.

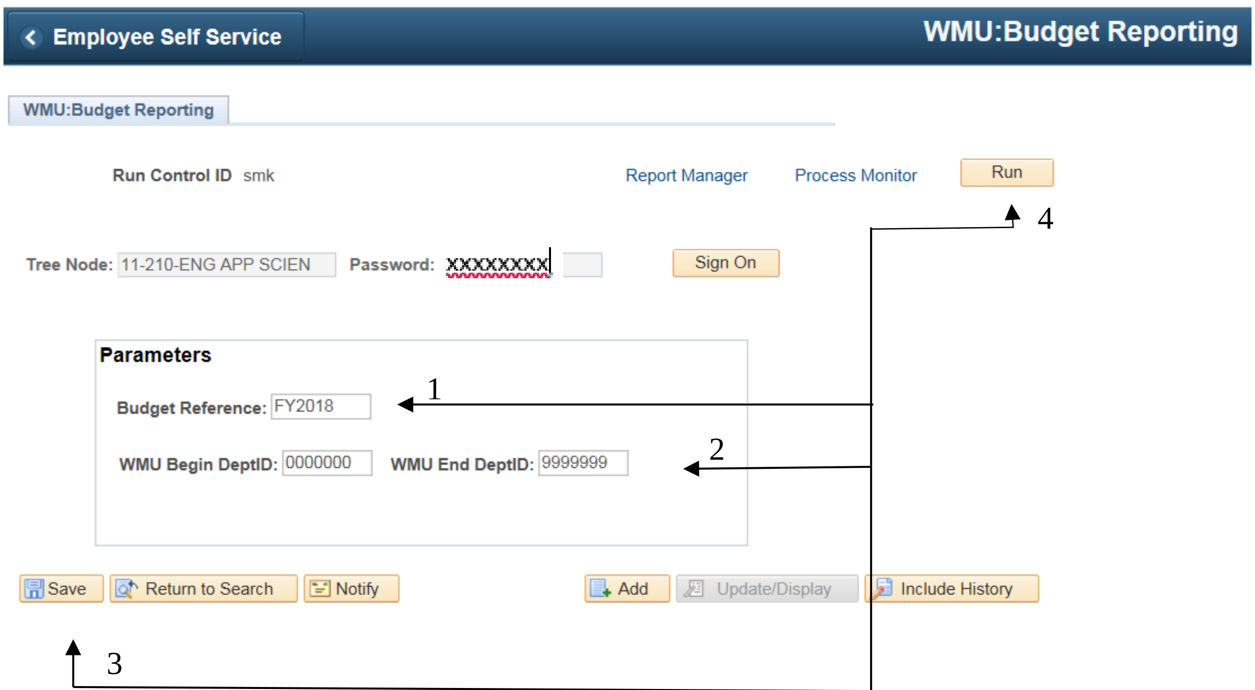


Budget Reference begins with "FY" followed by the 4-digit year.

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.

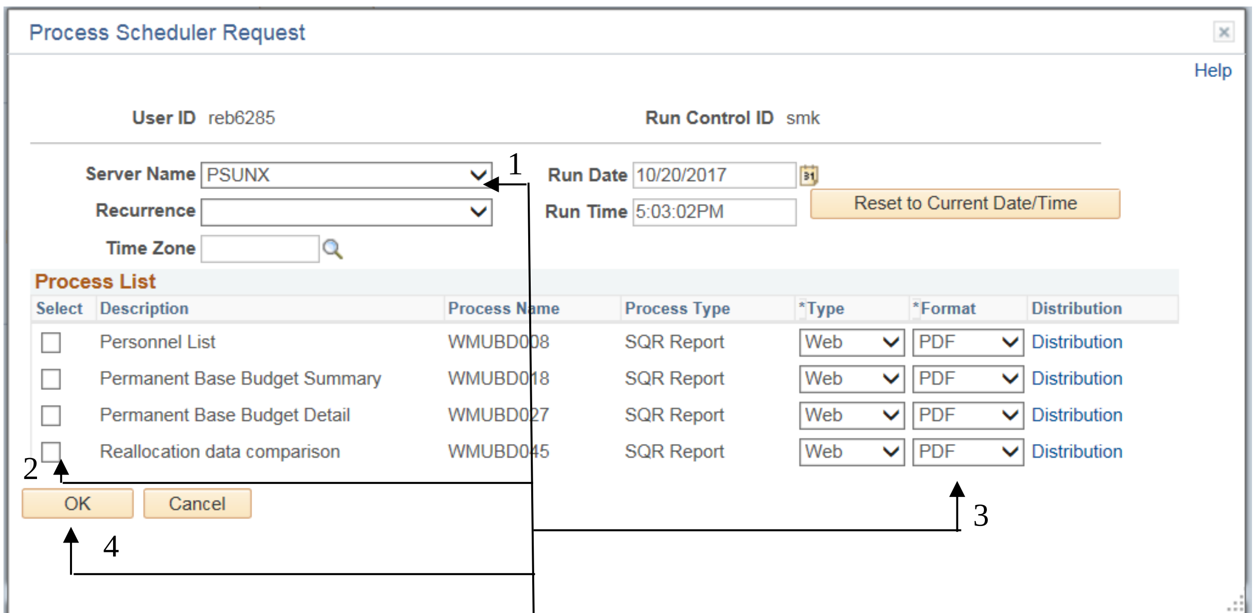
1. Enter Budget Reference.
2. Enter begin and end department id.
3. Select the Save button.
4. Select the Run button.

PROCESS SCHEDULER REQUEST PANEL:

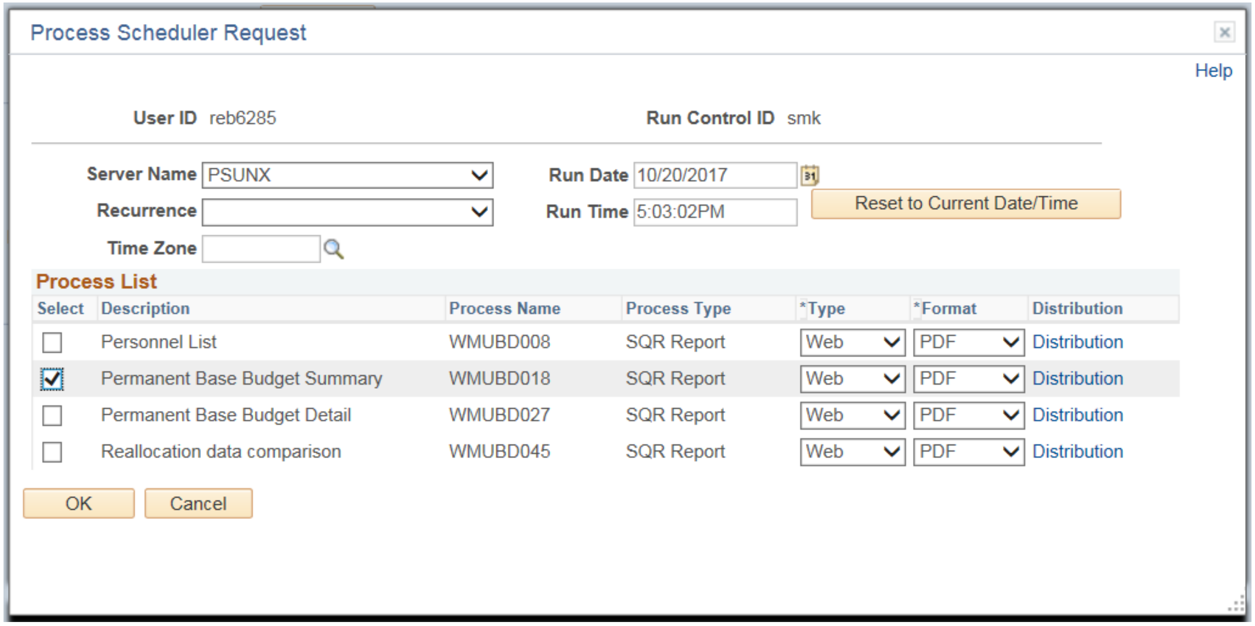
Selecting the run button brings you to the process scheduler request panel. It is at this panel you must select the report you wish to run. Select the report by checking the box next to the report description.

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.



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.



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:

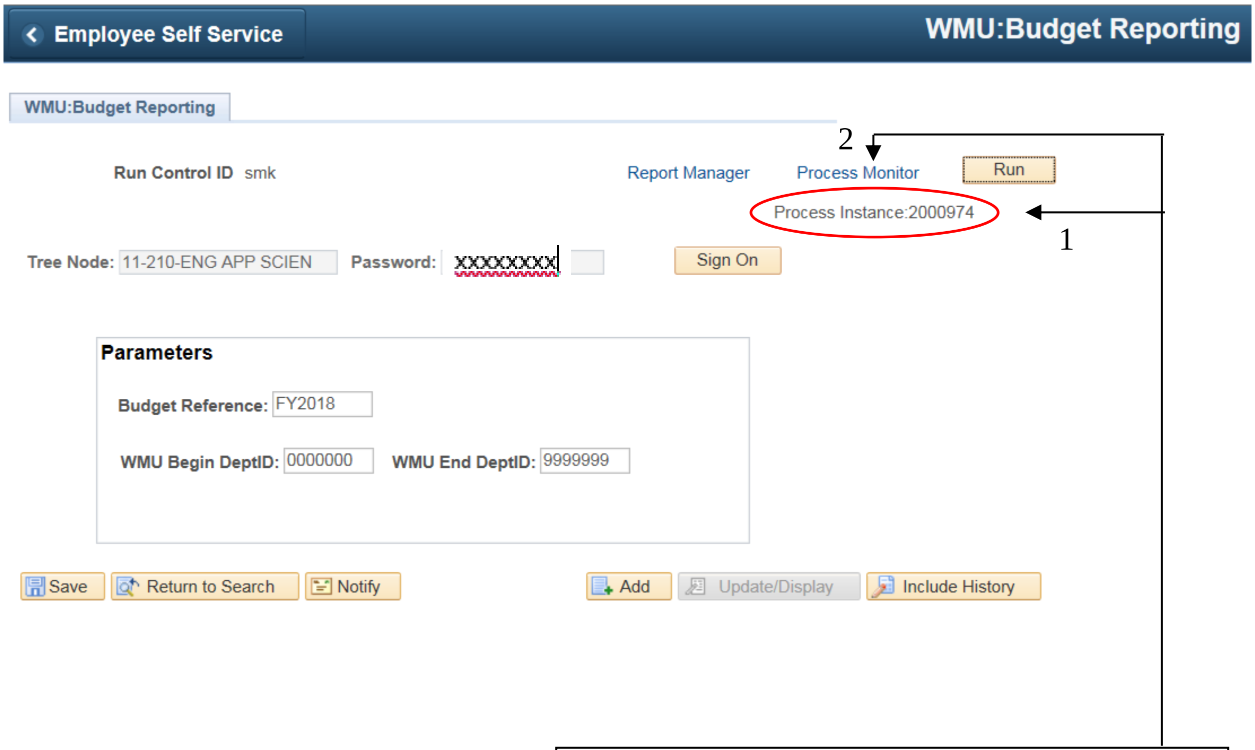
You may also at this time choose to run your report to excel. (Please note that although this function does create an excel file that is editable, it does require some cleanup by the user as all headings and titles may not come through clearly.) If you would like to use this option, change the type to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

After checking the 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.

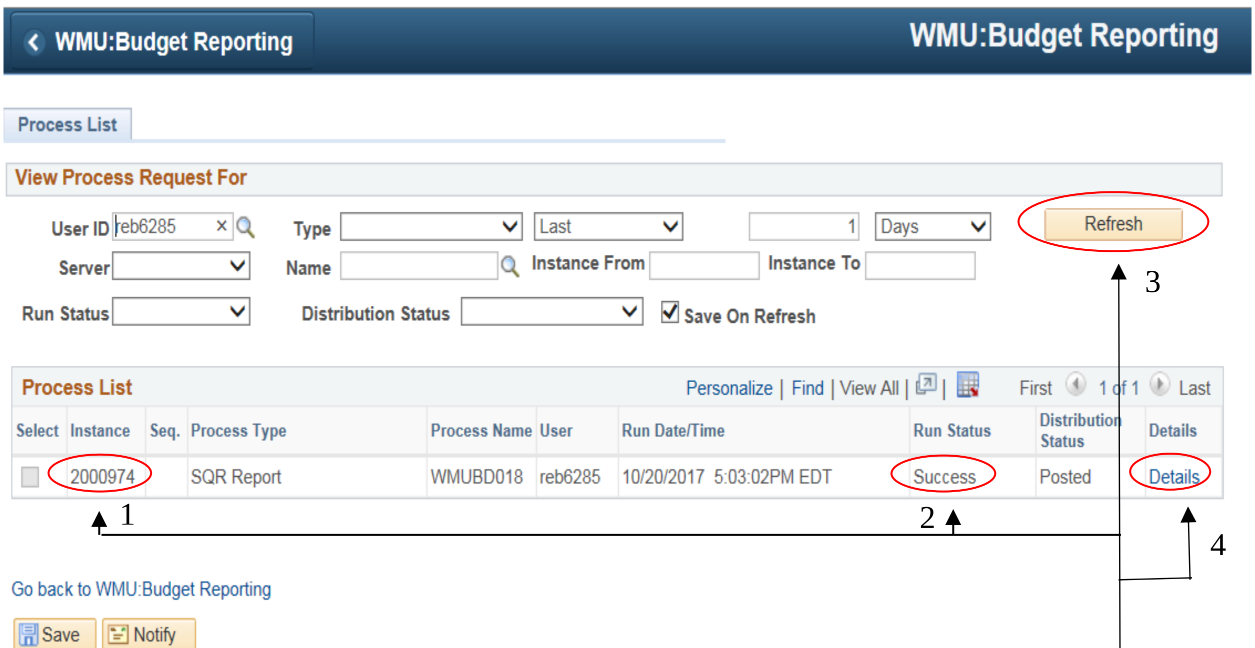


1. Note the process instance number.
2. Select Process Monitor.

PROCESS/REPORT LIST PANEL:

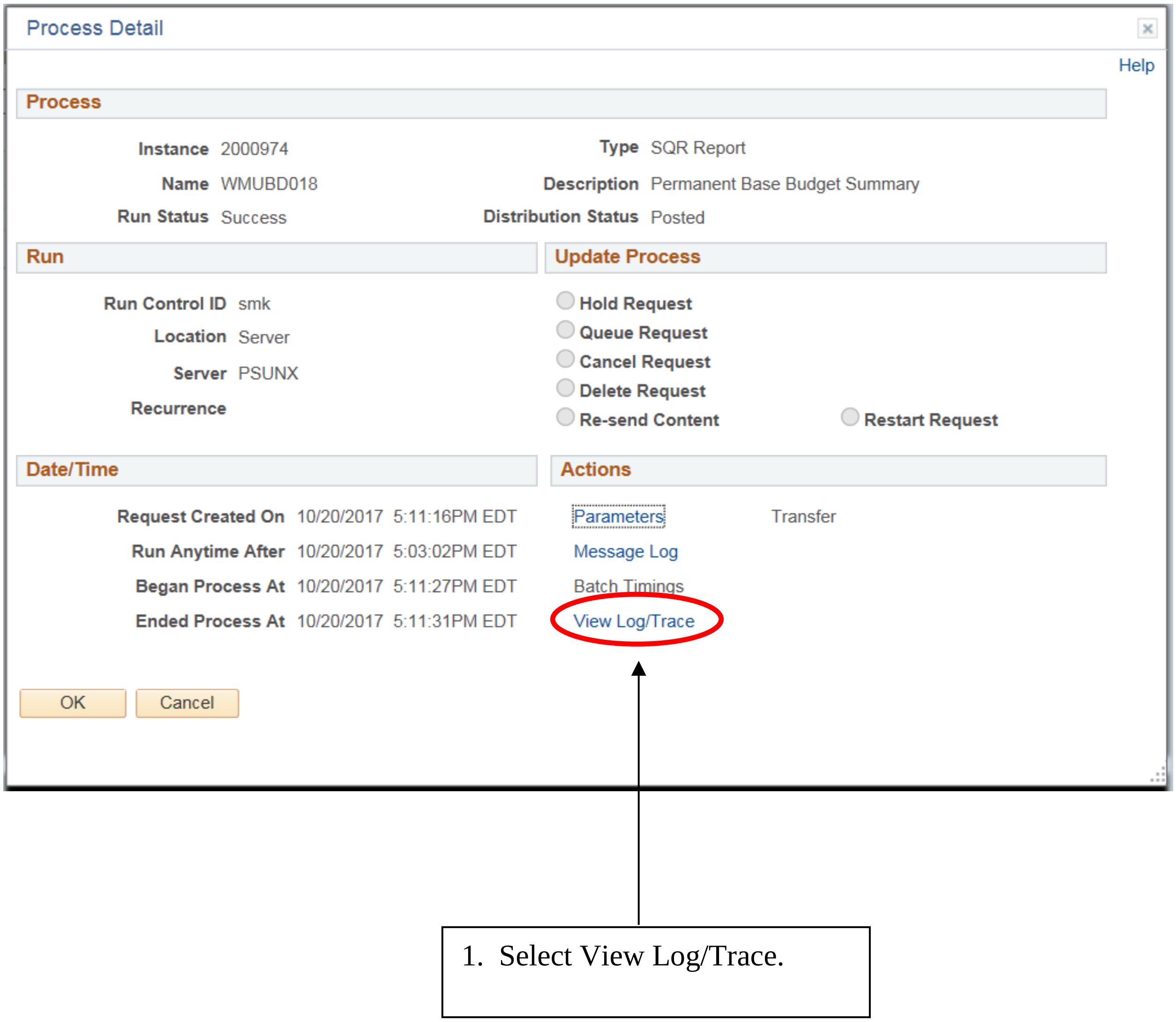
If your userid is not indicated in the user id box please enter it there. This is the userid that you used to sign into PeopleSoft. Then select the yellow refresh button.

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.



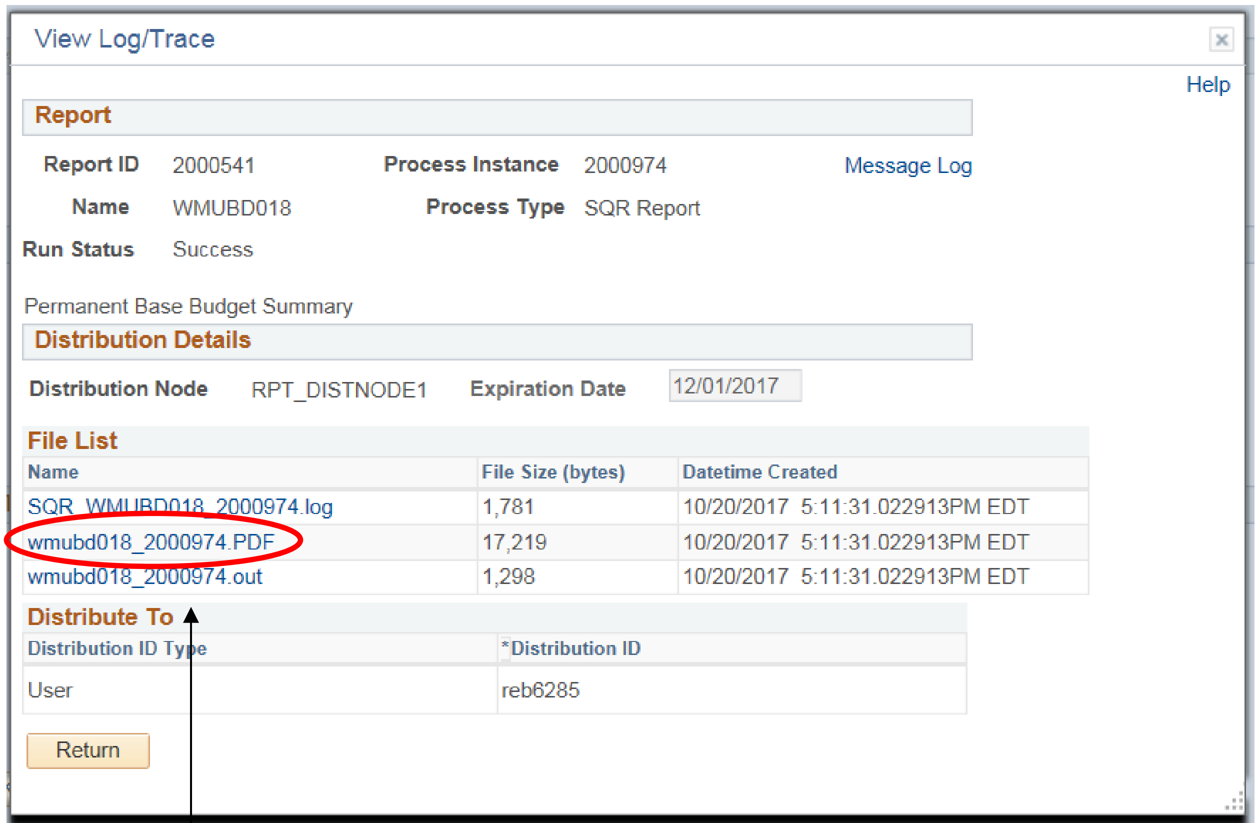
1. Locate the correct report using the process instance number.
2. Check the run status.
3. Select the Refresh button until the run status indicates "success."
4. Select details.

Then select the view log/trace.



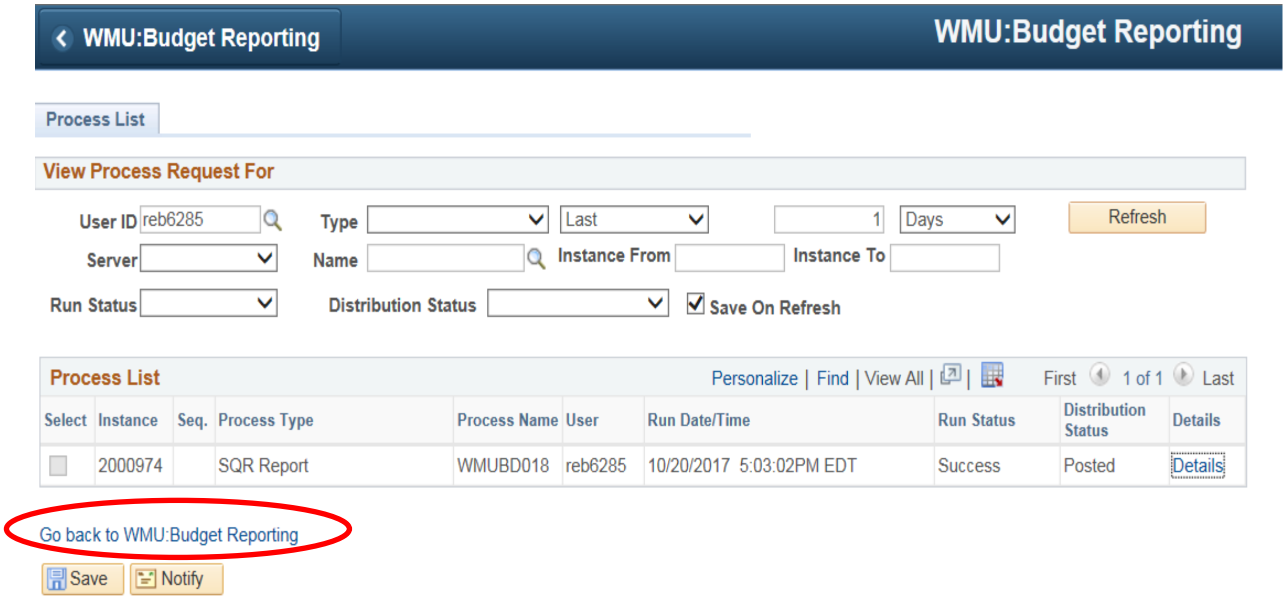
VIEW LOG/TRACE PANEL:

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.



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.



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.