Western Michigan University – Grants and Contracts

CUSTOM BUDGET REPORTING SYSTEM

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WHY WAS SYSTEM DEVELOPED?

- Feedback over the years received about GLOW not meeting grant expenditure/budget tracking needs
- Many departments were using alternative systems to track grant expenditures/budgets to line up with grant award
Survey disseminated to faculty and administrative staff involved with grants and contracts

Sample of survey questions:
- Satisfaction of GLOW or alternative system
- Why satisfied or unsatisfied
- What attributes would you like to see in a new system

Survey responses confirmed, those tracking grant budgets were looking for a more integrated system

System developed based on survey responses
A focus group comprised of various departments within the University community was put together to test and provide feedback regarding this system.

As a result of that feedback, modifications were made to the system.
WHAT IS IT?

- The Custom Budget Reporting System is an online budgeting tool that can be used to track your project budget.
- This will allow you to track your project budget and expenses using budget categories that are more specific to your project.
- This system will also allow you to track user-defined commitments.
- This system can be used as an alternative to spreadsheets or other budget tracking systems.
WHAT FUNDS CAN BE USED?

The Custom Budget Reporting System may be used with grant funds.

+ Fund 25
+ Fund 26
+ Fund 27
+ Fund 28
+ Fund 29
+ Fund 30
BENEFITS OF THE SYSTEM - BUDGET

- Option to import current GLOW budget, to use as is
- Option to import current GLOW budget and modify to better fit the actual project budget
- Option to create a custom budget from scratch, without direct import from GLOW
- Option to create various budget report types
  + Report Type Examples: By year, activity, task, principal investigator, etc.
- Budgets are checked to verify that the total budget always ties to GLOW
BENEFITS OF THE SYSTEM - EXPENSES

- All expenses are directly imported from GLOW
- All expenses can be manually assigned by the user to any custom budget category that you may create
- Expenses may be split for reporting purposes
  + Split expenses are checked to verify that the sum of the split expenses always ties to the original expense from GLOW
- Additional descriptions may be added to expenses for reporting purposes

Grants and Contracts – www.obf.wmich.edu/grants-contracts
Commitments may be added to your budget report in order to keep track of future expenses.

Commitments will show as a separate column on the report.
BENEFITS OF THE SYSTEM - SHARE

- Share your custom budget report with other individuals on your project
- Optionally, share the full report or a specific report type
- Shared reports are viewed by logging in with a bronco net id and password
BENEFITS OF THE SYSTEM - REPORTS

- There are 2 reports available:
  - **Custom Budget Report** – shows you the budget categories, assigned expenses, including split expenses, and user-defined commitments, as defined by you within this system.
  - **GLOW Cross-Reference Budget Report** - shows the original GLOW budget categories and your assigned expenses, including split expenses, and user-defined commitments. This report will identify where budget adjustments to GLOW may need to be made through the Universities accounting system.
BENEFITS OF THIS SYSTEM - SECURITY

- System is backed up nightly
- Users will only have access to projects within their assigned business area(s)
SUMMARY OF SYSTEM VERSUS USER

- What’s automated?
  + Import of GLOW budget, if specified
  + Import of all expenses
  + Verification that the total budget and all expense splits tie to GLOW
  + Daily backup

- What does the user do?
  + Create custom budget categories
  + Assign expenses to budget categories
  + Split expenses
  + Add commitments
  + Print, email, export, or share reports within the system
EXPANDING THE SYSTEM

- Additional functionality will be added as we continue to use and grow the system
- All questions and feedback are welcome
HOW DO I ACCESS THIS SYSTEM?

- **www.fs.wmich.edu/GrantsReporting**
- Request access to your specific departmental area(s):
  - [www.obf.wmich.edu/grants-contracts](http://www.obf.wmich.edu/grants-contracts)
- Download a copy of the manual from the login page
- Login using your existing bronco net id and password
- Attend a hands-on training session
TRAINING SESSION

- Date: Wednesday, October 12, 2011
- Time: 8:30 am – 10:00 am
- Location: Waldo Library, Classroom B
- Register online:
  + www.obf.wmich.edu/grants-contracts
- Future training sessions will be made available and will be listed on our web site
QUESTIONS AND COMMENTS

- You may always contact us by email at:
  + grants-services@wmich.edu
- You may call the Grants and Contracts office at:
  + 387-4707
- This presentation will be available on our website:
  + www.obf.wmich.edu/grants-contracts