Welcome!

The Grants and Contracts Reporting System (GCRS) currently includes a Custom Budget Reporting tool. This tool is intended to be an internal reporting mechanism to be used to track your project budget in different budget categories, which are more specific to your project, assign expenses to these various budget categories, split expenses, and add user-defined commitments. This reporting tool is for Grant Funds 25-30 only. This reporting tool (es to GLOW); however, it is not a substitution for GLOW. All official accounting entries will continue to go through the University Accounting System.

For official reports or data analysis, please contact the Grants and Contracts office at 269-473-707 or email us at grants-services@wmich.edu.

Western Michigan University
Grants and Contracts
http://www.fs.wmich.edu/GrantsReporting
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Overview

The Grants Reporting System currently includes a Custom Budget Reporting tool. This tool is intended to be an internal reporting mechanism to be used to track your project budget in different budget categories, which are more specific to your project. You will be able to assign expenses to these various budget categories, split expenses, and add user-defined commitments.

This reporting tool is for Grant Funds 25-30 only. This reporting tool ties to GLOW; however, it is not a substitution for GLOW. All official accounting entries will continue to go through the University Accounting System.

Login

- Enter your Bronco NetID
- Enter your Password
- Click the Submit Button

Messages

- Read messages related to the Grants Reporting System

Help

- Print an updated version of the Grants Reporting System manual
Create/Edit Your Custom Budget Report

Step 1: Search

- Select Fund (25-30 only)
- Enter Deptid
- Click Search

NOTES:
The system will only allow you to create/edit project budget reports for...

- Active Projects
- Projects that have a GLOW budget and at least one GLOW expense
- Projects whose primary department is included in your assigned department(s)

Existing Project Budget Report
After selecting a fund, entering a deptid, and clicking search, your report information will be retrieved from the database.
New Project Budget Report

- Check **Create Custom Budget** if you would like to manually enter in a custom budget for your project.
- Check **Import GLOW Budget** if you would like to import the budget from GLOW.
- Click **Search**

**NOTES:**

- If you choose to import the GLOW Budget, you are able to add/edit/delete budget categories, within this system, in order to customize your budget.
- Check **Reset** to enter a different Fund/Deptid.
Step 2: Budget Categories

If you checked Import Glow Budget, the budget will be imported from GLOW. You are able to add/edit/delete budget categories.

NOTES:
- Your custom budget must always be in balance with your GLOW budget.
- If you need to make official budget adjustments to GLOW, please contact your Grant and Contract specialist.
If you checked **Create Custom Budget**, you will need to manually add your budget categories. You are able to add/edit/delete budget categories.

**NOTES:**
- If there is a Facilities and Administrative Costs (F&A) budget category from GLOW, the category will automatically be added. The F&A budget is read-only. If an F&A budget revision is made to GLOW, the budget amount will be updated the next time you search for your project.
- Your custom budget must always be in balance with your GLOW budget.
- If you need to make official budget adjustments to GLOW, please contact your Grant and Contract specialist.

### Add New Budget Category

- Click **Add New Budget Category**
- Enter **Category**
- Enter **Description**
- Enter **Amount**
- Enter **Sort Order** (the order the budget category should appear on your budget report)
- Click **Insert**

**NOTES:**
- Click **Cancel** to cancel adding a new budget category
### Grants Reporting System

**Click to Create/Edit Your Custom Project Budget Report**

<table>
<thead>
<tr>
<th>Department</th>
<th>Category</th>
<th>Description</th>
<th>Amount</th>
<th>Show Summary Only</th>
<th>Budget Category Order</th>
<th>Budget Report Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 7015270</td>
<td>S&amp;W Dr. Joe Smith</td>
<td>Personnel</td>
<td>$59,290.00</td>
<td>Yes</td>
<td>1</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>S&amp;W Dr. Frances Bronco</td>
<td>Personnel</td>
<td>$59,000.00</td>
<td>Yes</td>
<td>2</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Fringe-Dr. Joe Smith</td>
<td>Fringe Benefits</td>
<td>$21,935.00</td>
<td>Yes</td>
<td>3</td>
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<tr>
<td>25 7015270</td>
<td>Fringe-Dr. Frances Bronco</td>
<td>Fringe Benefits</td>
<td>$26,313.00</td>
<td>Yes</td>
<td>4</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Student-Tammy Johnson</td>
<td>Personnel</td>
<td>$9,000.00</td>
<td>Yes</td>
<td>5</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Student-Ricky Phillips</td>
<td>Personnel</td>
<td>$10,041.00</td>
<td>Yes</td>
<td>6</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Tuition-Ricky Tammy Johnson</td>
<td>Tuition/Fees</td>
<td>$5,500.00</td>
<td>Yes</td>
<td>7</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Tuition-Ricky Phillips</td>
<td>Tuition/Fees</td>
<td>$5,500.00</td>
<td>Yes</td>
<td>8</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Conference Trip</td>
<td>Travel</td>
<td>$3,030.00</td>
<td>Yes</td>
<td>9</td>
<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Additional Miscellaneous Travel</td>
<td>Travel</td>
<td>$6,000.00</td>
<td>Yes</td>
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<td>Default</td>
</tr>
<tr>
<td>25 7015270</td>
<td>Supplies</td>
<td>Supplies</td>
<td>$6,000.00</td>
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<tr>
<td>25 7015270</td>
<td>Printing</td>
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<td>12</td>
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</tr>
<tr>
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<td>Other</td>
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<tr>
<td>25 7015270</td>
<td>Glow P&amp;A</td>
<td>Glow P&amp;A</td>
<td>$15,481.00</td>
<td>Yes</td>
<td>999</td>
<td>P&amp;G</td>
</tr>
</tbody>
</table>

**Total GLOW Budget:** $220,000.00  
**Total Custom Budget:** $220,000.00

---

**Show Summary Only**
- Click the checkbox in the **Show Summary Only** column if you do not want the detail to show for that budget category on the **Custom Budget Report**.

**Budget Category Order**
- To change the order in which the budget categories are displayed on the reports, enter the order next to the appropriate budget category (1, 2, 3, etc...), then click **SAVE CHANGES** in the header of that column.

**Budget Report Type – 1 Budget Report**
- The initial budget report type for each budget category is **Default**. If you only need 1 report, which includes all budget categories, you may disregard this column.
Grants Reporting System

**Budget Report Type – Multiple Budget Reports**
- If you desire to break-down the budget categories into separate budget reports (Ex: Year 1, Year 2, Year 3 or PI-A, PI-B, PI-C or Task 1, Task 2, Task 3, etc...), enter the name of the budget report type next to the appropriate budget category, then click **Save Changes** in the header of that column. This will allow you to create separate budget reports.

<table>
<thead>
<tr>
<th>Fund</th>
<th>DeptID</th>
<th>Category</th>
<th>Description</th>
<th>Amount</th>
<th>Show Summary Only</th>
<th>Budget Category Order</th>
<th>Budget Report Type Order</th>
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<td>25</td>
<td>7015270</td>
<td>Fringe</td>
<td>Fringe Benefits</td>
<td>$21,935.00</td>
<td>3</td>
<td>Year 1</td>
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<td>25</td>
<td>7015270</td>
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<td>Fringe Benefits</td>
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<td>Year 2</td>
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<tr>
<td>25</td>
<td>7015270</td>
<td>Student</td>
<td>Student-Thomas Johnson</td>
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<td>5</td>
<td>Year 1</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student</td>
<td>Student-Rory Phillips</td>
<td>$10,041.00</td>
<td>6</td>
<td>Year 2</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Tuition</td>
<td>Tuition/Fees</td>
<td>$5,500.00</td>
<td>7</td>
<td>Year 1</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Tuition</td>
<td>Tuition/Fees</td>
<td>$5,500.00</td>
<td>8</td>
<td>Year 2</td>
<td></td>
</tr>
<tr>
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<td>Conference</td>
<td>Conference Trip</td>
<td>$3,030.00</td>
<td>9</td>
<td>Year 2</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Travel</td>
<td>Travel</td>
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<td>Year 1</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Supplies</td>
<td>Supplies</td>
<td>$2,000.00</td>
<td>11</td>
<td>Year 1</td>
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<tr>
<td>25</td>
<td>7015270</td>
<td>Supplies</td>
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<td>Year 2</td>
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<td>25</td>
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<td>Year 1</td>
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</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Other</td>
<td>Other</td>
<td>$800.00</td>
<td>15</td>
<td>Year 2</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Glow M&amp;A</td>
<td>Glow M&amp;A</td>
<td>$15,481.00</td>
<td>16</td>
<td>Glow M&amp;A</td>
<td></td>
</tr>
</tbody>
</table>

**Total GLOW Budget:** $220,000.00  
**Total Custom Budget:** $220,000.00
## Edit Existing Budget Category

- **Click Edit** next to the budget category that you want to edit

### Grants Reporting System

**Click to Create/Edit Your Custom Project Budget Report**

<table>
<thead>
<tr>
<th>Fund</th>
<th>DeptID</th>
<th>Category</th>
<th>Description</th>
<th>Amount</th>
<th>Show Summary Only</th>
<th>Budget Category Order</th>
<th>Budget Report Type</th>
<th>Budget Report Type Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>7015270</td>
<td>Skull-Dr. Joe Smith</td>
<td>Personnel</td>
<td>$50,200.00</td>
<td>1</td>
<td>Year 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Skull-Dr. Frances Bronco</td>
<td>Personnel</td>
<td>$59,000.00</td>
<td>2</td>
<td>Year 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Fringe-Dr. Joe Smith</td>
<td>Fringe Benefits</td>
<td>$21,935.00</td>
<td>3</td>
<td>Year 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Fringe-Dr. Frances Bronco</td>
<td>Fringe Benefits</td>
<td>$26,212.00</td>
<td>4</td>
<td>Year 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student-Tammy Johnson</td>
<td>Personnel</td>
<td>$9,000.00</td>
<td>5</td>
<td>Year 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student-Ricky Phillips</td>
<td>Personnel</td>
<td>$10,041.00</td>
<td>6</td>
<td>Year 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student-Ricky Tammy Johnson</td>
<td>Tuition/ Fees</td>
<td>$5,500.00</td>
<td>7</td>
<td>Year 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student-Ricky Phillips</td>
<td>Tuition/ Fees</td>
<td>$5,500.00</td>
<td>8</td>
<td>Year 2</td>
<td></td>
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<tr>
<td>25</td>
<td>7015270</td>
<td>Conference Trip</td>
<td>Travel</td>
<td>$3,030.00</td>
<td>9</td>
<td>Year 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Additional Miscellaneous Travel</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Supplies</td>
<td>Supplies</td>
<td>$2,000.00</td>
<td>11</td>
<td>Year 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Supplies</td>
<td>Supplies</td>
<td>$4,000.00</td>
<td>12</td>
<td>Year 2</td>
<td></td>
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</tr>
<tr>
<td>25</td>
<td>7015270</td>
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<td>Printing and Duplicating</td>
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<td>Year 2</td>
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<tr>
<td>25</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total GLOW Budget:** $220,000.00

**Total Custom Budget:** $220,000.00
### Grants Reporting System

- Make changes to the **Category**, **Description**, **Amount**, **Show Summary Only**, **Sort Order**, and **Budget Report Type**
- Click **Update**

#### NOTES:
- Click **Cancel** to cancel editing an existing budget category

#### Delete Budget Category
- Click **Delete** next to the budget category that you want to delete

#### NOTES:
The system will only allow you to delete a budget category if it is not...
- Assigned to an expense
- Assigned to a user-defined commitment

---

<table>
<thead>
<tr>
<th>Fund</th>
<th>DeptID</th>
<th>Category</th>
<th>Description</th>
<th>Amount</th>
<th>Show Summary Only</th>
<th>Budget Category Order</th>
<th>Budget Report Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student-Tammy Johnson</td>
<td>Personnel</td>
<td>$9,000.00</td>
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</tr>
<tr>
<td>25</td>
<td>7015270</td>
<td>Student-Ricky Phillips</td>
<td>Personnel</td>
<td>$10,041.00</td>
<td></td>
<td>6 Year 2</td>
<td>Edit</td>
</tr>
<tr>
<td>10</td>
<td>7015270</td>
<td>Student-Ricky Phillips</td>
<td>Tuition/Fees</td>
<td>$6,000.00</td>
<td></td>
<td>7 Year 1</td>
<td>Edit</td>
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<tr>
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<td>Travel</td>
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<td></td>
<td>9 Year 2</td>
<td>Edit</td>
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<td>7015270</td>
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<td>$6,000.00</td>
<td></td>
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<td>Edit</td>
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<td>13 Year 2</td>
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</tr>
</tbody>
</table>

**Total GLOW Budget:** $220,000.00  **Total Custom Budget:** $330,000.00
Step 3: Expenses

As a default, the expenses displayed in the grid will be for the last Fiscal Year (FY) and Period, which have expenses on GLOW.

NOTES:
Total Expenses - This amount is calculated for the expenses that are visible within the grid.

Filter Expenses
- Select From FY and Period
- Select To FY and Period
- Click Show Expenses
Assign Budget Categories

- Select Category for each expense row
- Click Save Budget Category Assignments

Optionally:

- Check Reconciled (this field can be used as desired; ex: to signify that the expense has been reconciled with your records)
- Enter User Description (this will be displayed on the report(s) next to the GLOW description, providing additional information related to the expense)

Split Expenses

- Check Split Expense on the expense row that you would like to split
- Enter Description
- Enter Amount
- Select Category
- Click Add

Optionally:

- Check Reconciled (this field can be used as desired; ex: to signify that the expense has been reconciled with your records)

NOTES:

- Once an expense has been split, the original expense will not be displayed on the report(s).
- The split expenses must add up to the original GLOW expense amount.
- You may delete the split expenses if you want to include the original expense on the report(s).
Step 4: User-Defined Commitments

You may add commitments to your budget report.

Add New User-Defined Commitment

- Click **Add New User-Defined Commitment**
- Select **Category** (your custom budget category)
- Enter **Description**
- Enter **Amount**
- Enter **Date** (date you expect the commitment to be incurred)
- Select **Corresponding Glow Category** (used to view the GLOW Cross-Reference Budget Report, to identify when budget adjustments to GLOW need to be made – see **View Reports**)
- Click **Insert**

**NOTES:**

- Click **Cancel** to cancel adding a commitment
**Edit Existing User-Defined Commitment**
- Click **Edit** next to the commitment that you want to edit
- Make changes to the **Description**, **Amount**, **Date**, **Category**, and **Glow Budget Category**
- Click **Update**

**Remove Commitment from Report(s)**
- Click **Edit** next to the commitment that you want to remove from the report
- Check **Posted**
- Click **Update**

**NOTES:**
- Click **Cancel** to cancel editing a commitment

**Delete Commitment**
If you entered a commitment in error...
- Click **Delete** next to the commitment that you want to delete
Step 5: Share (optional)

You may optionally share your report (view-only) with other university employee’s.

Share Your Budget Report

- Click Share Your Budget Report
- Enter Last Name
- Click Search
- Select User (Share Report with)
- Select Budget Report Type (If you would like to share all budget report types with this user, click All.)
- Click Insert

NOTES:

- Click Cancel to cancel sharing your budget report
- The Grants and Contracts staff will automatically have the ability to view your report.

Remove a User from Viewing Your Report

- Click Delete
View Reports

**Your Custom Budget Report**
The Custom Budget Report will show you your custom budget categories, assigned expenses including your custom split expenses, and your user-defined commitments. This report is for internal use only. If needed, budget adjustments to GLOW will still need to be processed, as this is ONLY a reporting tool.

- Click View Your Custom Budget Report

**GLOW Cross-Reference Budget Report**
The GLOW Cross-Reference Budget Report will show the original GLOW budget categories and will identify where Budget Adjustments to GLOW may need to be made. You may request these Budget Adjustments through your Grant and Contract Specialist.

- Click View Glow Cross-Reference Budget Report
Grants Reporting System

Create/Edit Your Own Project Budget Report

Enter Expenses From Date: [Blank] To Date: [Blank]
Budget Report Type: *Includes Unassigned Expenses and All F&A  Year 1 □ All

Filter Report

Custom Budget Report for 25 - 7015270 created by: HESS, MELISSA K

Process Report
- Enter Expenses From Date (the beginning date of expenses to show on the report)
- Enter To Date (the ending date of expenses to show on the report)
- Select the Budget Report Type (Click All to include all budget report types in the report)
- Click Filter Report

Print Report
- Click Printer Icon

Export Report
- Select a format
- Click Export

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Western Michigan University
Grants and Contracts Custom Budget Reporting System

Disclaimer: INTERNAL REPORT - This Customized Project Budget Report is intended to be used for internal purposes only. For official project financial status reports, please contact your Grant and Contract Specialist at 387-4707.

Custom Budget Report for 25 - 7015270 created by HESS, MELISSA K.
Expenses from 08/01/2011 to 08/31/2011.

<table>
<thead>
<tr>
<th>Category/Description</th>
<th>Date</th>
<th>Budget</th>
<th>Actuals</th>
<th>User Defined Commitments</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>S&amp;W Dr. Joe Smith - Year 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td></td>
<td>$50,200.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$50,200.00</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td></td>
<td>$21,936.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$21,936.00</td>
</tr>
<tr>
<td>Student - Tammy Johnson - Year 1</td>
<td></td>
<td>$9,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$9,000.00</td>
</tr>
<tr>
<td>Tuition - Tammy Johnson - Year 1</td>
<td></td>
<td>$5,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,000.00</td>
</tr>
</tbody>
</table>
**View Existing Budget Reports**

- Select **Click to View Existing Budget Reports** section

**Your Budget Reports**

On the **Created by You** tab, you are able to quickly view the budget report(s) based on the last date that you modified the report. (To import new data and assign expenses, click on “**Click to Create/Edit Your Custom Project Budget Report**” and search for your fund/deptid.)

**Custom Report**

- Click **View Report** under the **Custom Report** column on the row of the fund/deptid that you would like to view a custom report

**Glow Report**

- Click **View Report** under the **GLOW Report** column on the row of the fund/deptid that you would like to view a GLOW cross-reference report

**Delete Report**

To delete a budget report that you created in error or no longer need...

- Click **Delete Report** on the row of the fund/deptid that you would like to delete
- Click **Yes** to **PERMANENTLY** delete this version of the report
- Click **No** to cancel the deletion of the report

**NOTES:**

- Your custom report must be in balance with your GLOW budget and expenses, in order to view the report(s).
Delete Your Budget Report

25 - 7015270

This will delete all Budget Categories, Budget Category Assignments, User-Defined Commitments, and Shared Budget Reports for this project.

Yes  No
**Shared Budget Reports**

On the **Shared by Others** tab, you are able to view the budget report(s) that have been shared by other users.

**Custom Report**
- Click **View Report** under the **Custom Report** column on the row of the fund/deptid that you would like to view a custom report.

**Glow Report**
- Click **View Report** under the **GLOW Report** column on the row of the fund/deptid that you would like to view a GLOW cross-reference report.

**NOTES:**
- The shared custom report must be in balance with their GLOW budget and expenses in order to view the report(s).

**Logout**
- Click **Logout** to logout of the system.