Instructions for Budget Activity Report

The **Budget Progress Report** will no longer be available in the upgraded version of PeopleSoft (version 9.2). The **Budget Activity Report** will be replacing the **Budget Progress Report**. The **Budget Activity Report** looks and functions very similar to the old **Budget Progress Report**. **Users** will need to set up a new run control ID for the **Budget Activity Report**. Below are instructions for creating the new run control ID and for entering the parameters for the report.

Some of the changes that you will see:

- The prior and future period rows have been removed from the report.
- Changes were made so the line descriptions are better identified. For example, the line that liquidates an encumbrance will now reflect a description of “Encumbrance Liquidation” and will indicate the PO ID and line # being liquidated.
- Users will need to establish a user id and run the Grant Budget Activity Report for grant accounts.

1. **Click on BOR Menus**

![BOR Menus](image-url)
2. Click on **BOR General Ledger**
3. Click on **BOR GL Reports**

4. Click on **Budget Activity Report**

5. You will need to establish a new **Run Control ID** before you run the report for the first time.
6. Click on the **Add a New Value** tab
7. Enter a run control ID (Budget_Activity_Report). Remember run control ID’s cannot have any spaces.
8. Click the **Add** button
9. Enter the report parameters
   a. Indicate checkbox for **Detail** or **Summary** report
   b. Enter budget year in **Budget Reference**
   c. If you want all periods in the fiscal year, you can select the **All Fiscal Periods** checkbox. If you want certain periods, do not click the check box and enter the appropriate **Accounting Periods**.
   d. Enter **Fund Code(s)**
   e. Enter **Department ID**
   f. Enter **Account Code(s)**

10. Click the **Save** button
11. Click the **Run** button

12. Click **OK**
13. Click the **Process Monitor** link

14. Click **Refresh** until you receive a Run Status of **Success** and a Distribution Status of **Posted**.
15. Click Details link

16. Click View/Log Trace

Process Detail

Process

- Instance 6890992
- Name BORRG045
- Run Status Success

Type SQR Report

Description Budget Activity Reports

Distribution Status Posted

Run Control ID Budget_Activity_Report
- Location Server
- Server PSUNIX
- Recurrence

Date/Time
- Request Created On 03/18/2015 2:14:30PM EDT
- Run Anytime After 03/18/2015 2:14:13PM EDT
- Began Process At 03/18/2015 2:14:57PM EDT
- Ended Process At 03/18/2015 2:45:14PM EDT

Actions
- Parameters
- Transfer
- Message Log
- Batch Timings
- View Log/Trace

OK Cancel
17. Click the file name ending in .pdf

18. Your report will be displayed.