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 Menu]

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**Note:**
- For more detailed information, refer to the PeopleSoft 9.2 user guide available on the University of West Georgia's internal website.
2. Click on **BOR General Ledger**
3. Click on **BOR GL Reports**

![Image of BOR General Ledger and BOR GL Reports]

4. Click on **Budget Activity Report**

![Image of 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 Codes(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**
17. Click the file name ending in .pdf

18. Your report will be displayed.