Running a Budget Activity Report in Financials 9.2

The Budget Progress Report has been phased out with the upgrade to PeopleSoft Financials 9.2. Instead, Budget Managers will have access to the Budget Activity Report, which is very similar to the Budget Progress Report, to monitor their budget and expenditures.

To run the Budget Activity Report, log into PeopleSoft Financials using the link provided on the Budget Office website. After you log in, you will see the main menu.

Select the BOR Menus link.
Select BOR General Ledger and then the BOR GL Reports link.

Select the Budget Activity Report link.

This brings you to the page where you select an existing run control by clicking on the search button or you can add a new run control by selecting the tab labeled “Add a New Value”. This will then load the parameters page where you will enter the data for the report you wish to run.

**Recommendation** At this point, click on the “Favorites” button at the top of the page and set this report as a favorite. This works just like a favorite on an internet browser.
The parameter page will look very similar to the Budget Progress Report parameter page, but we have some new enhanced features.
At the top of the page, you will see you now have the option to run a detail report or a summary report. One of these two boxes must be checked to run the report. For this example, a detail report will be run. You may select both of these boxes at one time. You will receive two emails – one containing the detailed report and another with the summary report.

The next box is the business unit. For GPC, this is 71000.
The next field is the Budget Reference field. This is for the budget year you wish to run the report. In this example, we will look at the 2015 budget year.

A new feature is the ability to run the report for all fiscal periods. By selecting this box, the report will include the budget and expenditure data for the budget year entered in the budget.
reference box and all accounting periods. When this box is selected, the to/from Fiscal Year and the to/from Acctg Period boxes are greyed out.

If you do not select the All Fiscal Periods box, you will need to select the fiscal year and account period you wish to see. The fiscal year can be for the current year only or for a range of years, if you wish to see prior year data. The Accounting Period is the same as it was for the Budget Progress Report.

Period 1 = July
Period 2 = August
Period 3 = September
Period 4 = October
Period 5 = November
Period 6 = December
Period 7 = January
Period 8 = February
Period 9 = March
Period 10 = April
Period 11 = May
Period 12 = June

For this example, the All Fiscal Period box will be used.

The next field is the project field. Unless you have a facility or IT project, you will leave this field populated with the % or wildcard. If you are running a report for a facility or IT project, you can either type in the project ID or use the magnifying glass to search for the correct project ID.
The next field is the fund code. It is recommended you leave this with the % or wildcard symbol to bring back all funds associated the department.

The next field is the department fields. You would enter in your 7 digit department ID number or use the magnifying glass to search for it. As you type the number, a search box will also automatically display.
The last field is the account code. Enter the range of accounts you wish to see. The account structure has not changed.

500000 = Personal Services
600000 = Travel
700000 = Operating
800000 = Equipment

In this example, we will see what has been charged to the selected department for all accounts.
Click on the save button to save the parameter page then click the Run button.

After selecting run, the Process Scheduler Request box will appear. There is now only one selection for the type of report since that has been added to the parameter page. Select the type of distribution you want. You have the option to email the report to yourself or to run it the window.
The report will look and read just as the Budget Progress Report did.
Please contact the Budget Office if you have any questions.

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