Monitoring Reports
Budget Progress 'Summary' & 'Detail' Reports

- The Budget Progress Report is the primary method utilized to regularly monitor the status of a Unit's current budget, the actual expenditures to date, and the remaining balances in each account.
- Access to reports requires a Banner login and password as well as setting up the recipient of the appropriate depts for which the Budget Manager has responsibility.
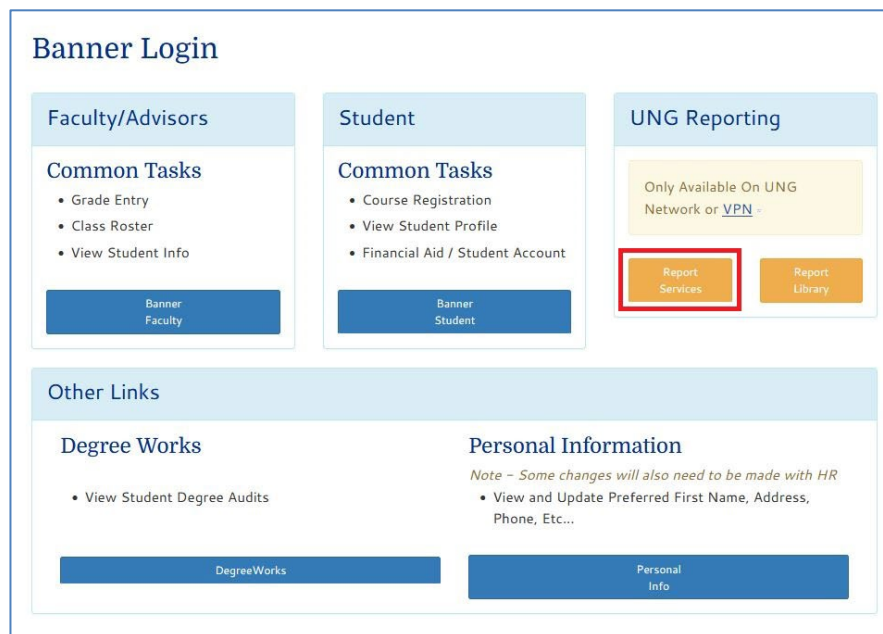
    Banner login and password: Contact **Information Technology at 706-864-1922**.

    Departmental Report Access: Contact **Wendy Haskew, Comptroller's Office at 706-867-2536**.

- After completing the two steps above, below is the link to access your reports:

https://go.ung.edu/banner

- Once logged in, click on the "Report Services" pictured and highlighted below:

- Once in "Reporting Services" click on "Peoplesoft Reports Menu"

- Click on "pso010 = Summary Budget Progress Report" for a summary report or "pso020 = Detail Budget Progress Report" for a detailed report, then follow the prompts to run/download the desired report

- An example of a "Budget Progress Report – Summary" is accessible from the Budget Handbook on the Budget Office web page. A similar report, "Budget Progress Report – Full Detail" is also available. The Full Detail provides vendor information and specified amounts, associated purchase order and check numbers, as well as the date of purchases.

- Monitoring budget progress reports insures accuracy of budget to actual expenses, and is similar to balancing a personal check book. Please refer to "Who to Call for Assistance", also accessible in the Budget Handbook, these contacts can help with reporting discrepancies or resolving pertinent report questions.

If you need this document in an alternative format for accessibility purposes (e.g. Braille, large print, audio, etc.) please contact the Budget Office at budget.office@ung.edu or 706-867-2837.