



Running Budget Reports & Queries

Intended Audience: Budget Managers

To access travel documentation, you will need to be in the LionLink's Finance Pillar. Select the “**FSCM**” hyperlink on the top right-hand side of your screen or the “**Financials Self-Service**” tile on the left-hand side of your screen.



Navigation: NavBar > Navigator > Reporting Tools > Bi Publisher > Query Report viewer

1. In the field, “**Search by**” field, select “**Report Name**”. In the “**begins with**” field, enter “**BFS**”
 - a. *A list of reports will be displayed.*
2. Choose the desired report. In this case **BFS_KK_B2AOP** (KK Budget to Actual Oper Dept) is the operating budget status report. (**BFS_KK_B2AGN** for Grants or Projects)
 - a. **BFS_GL_FINST** is another great report for getting summary budget information.

Employee Self Service **Query Report Viewer**

Query Report Viewer
Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by begins with

Search Results Show Template Prompts

Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
BFS_AR_00002	AR Sub Ledger Report	Query	QFS_AR_ITEM_DST_GL_BI	XLS	N	View Report
BFS_AR_00004	AR Payment Report	Query	QFS_AR_PAYMENTS_BI	XLS	N	View Report
BFS_AR_00006	Combined AR/CS Aging Report	Query	QFS_AR_CS_AGING_RPT	XLS	N	View Report
BFS_EX_3500	Delivered EXC3500 w CF and Dtl	Query	QFS_EX_GL_BAL_DTL_RPT_BI	RTF	N	View Report
BFS_GL_3231	GL3231 (Previously GA3231)	Query	QFS_GL_VEN_PAY_ADV_REIMBRS_RPT	PDF	N	View Report
BFS_GL_BLDIN	Building and Innovation Fee	Query	QFS_GL_BLD_INNOV_FEE_BI	PDF	N	View Report
BFS_GL_FINST	Financial Status Report	Query	QFS_GL_FINANCIAL_STATUS_RPT_BI	XLS	N	View Report
BFS_KK_B2AGN	KK Budget to Actual Grant Dept	Query	QFS_KK_BUDGET_TO_ACTUAL_GNT_BI	XLS	N	View Report
BFS_KK_B2AOP	KK Budget to Actual Oper Dept	Query	QFS_KK_BUDGET_TO_ACTUAL_OPR_BI	XLS	N	View Report
BFS_KK_GRANT	KK Grant w/Contract Bud & Exp	Query	QFS_KK_GRANT_CNTRCT_BUD_EXP_BI	XLS	N	View Report
BFS_TST_LOGO	Test Logo Image	Query	QFS_TEST_IMG_LOGO	PDF	N	View Report

3. Click the **“View Report”** hyperlink in the column to the right of the report name.
 - a. A pop-up screen will display

QFS_KK_BUDGET_TO_ACTUAL_OPR_BI

Business Unit:

Dept like (3%; 43%; % for all):

Year:

- b. In the **Business Unit** field, enter **“WA260”**
 - c. In the **“Dept like”** field...
 - i. Click the magnifying glass icon and search for the budget you would like to view
 - ii. OR, 2) enter the first two digits of the departments code followed by **“%”**. (e.g. 60% for all IT budgets)
 - iii. OR 3) click the magnifying glass for the **“Dept like”** field; then, in the Search by field, click the drop-down arrow and select **“Manager Name”** and enter **“(managers last name)”** into the field.
 1. A popup list of department codes will be displayed.
 2. **Click the desired budget code.**
 4. In the **“Year”** field, enter **“2022”**. Press Enter or click **“OK”**.
 - a. An Excel icon will be displayed in the lower left of your screen. Click on that icon to open the report you have requested. Excel will open and display the requested data.
5. Process Complete