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

   ![Pop-up screen](image)

   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