BUD-21 Run Budget Reports

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to generate Budget Reports in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the generation of Budget Reports in NCFS which will enable you to view the control budgets, budget accounts, and budget periods as well as to analyze the budget consumption and analyze the available funds.

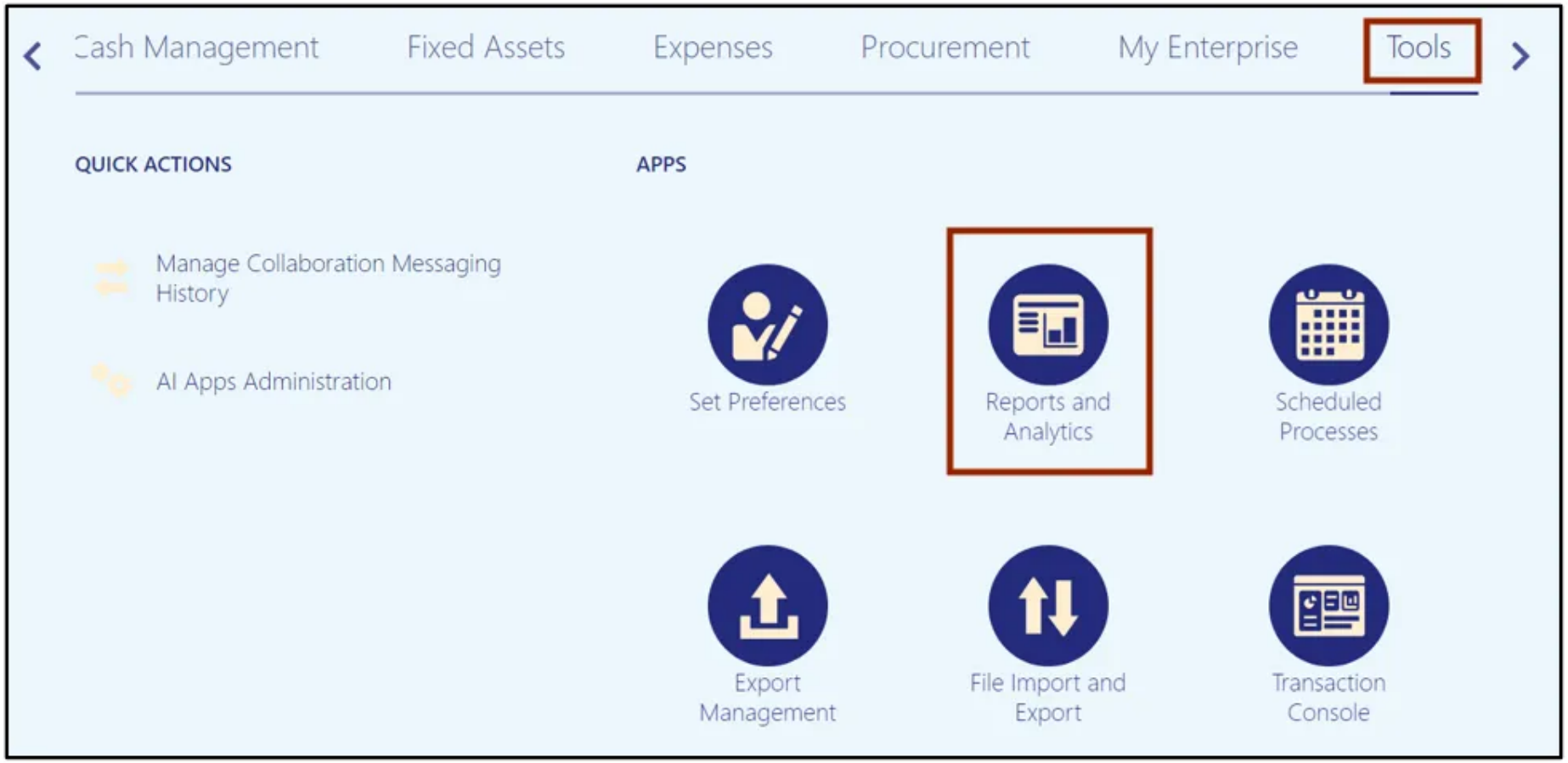
Note: If the folder structure changes in future, please be advised to look for the report in the correct folder or search for the report name using the search function.

Run Budget Reports

To run NC Budget to Actual (701) Certified Report (RPTBE006) in NCFS, please follow the steps below. There are 8 steps to complete this process.

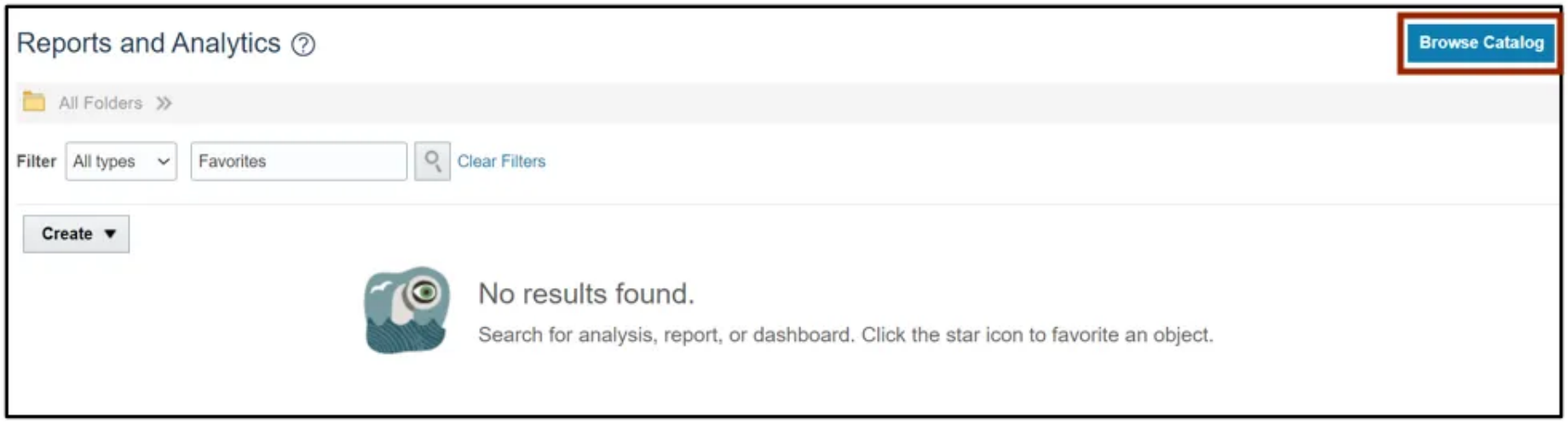
Step 1. On the NCFS **Home** page, click the **Tools** tab and then click the **Report and Analytics** app.

Image



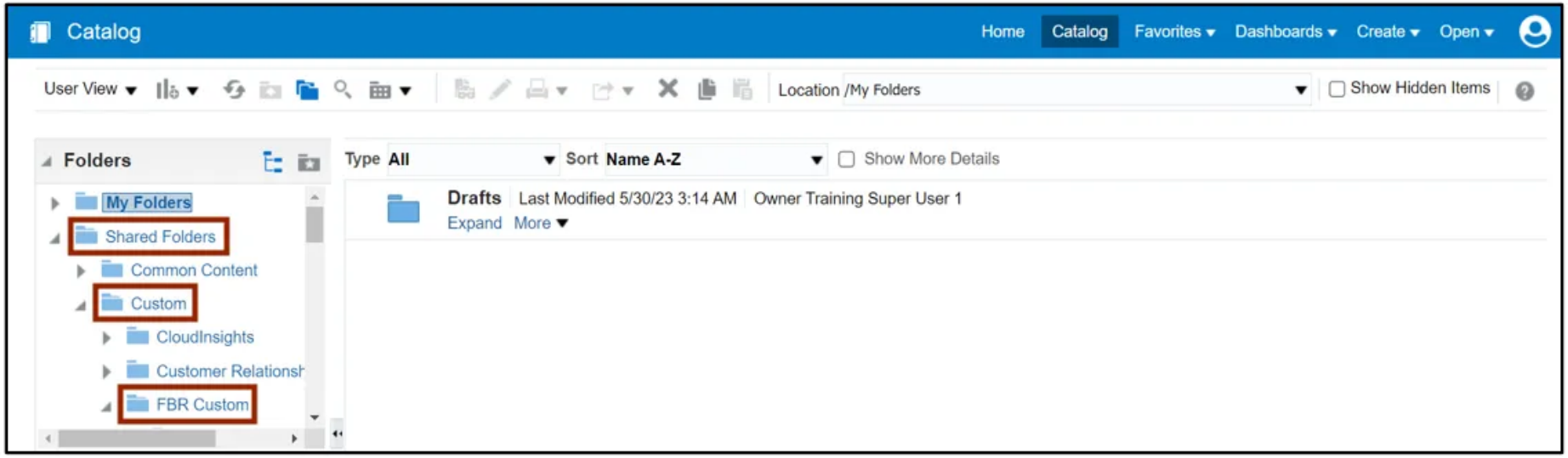
Step 2. On the **Reports and Analytics** page, click the **Browse Catalog** button.

Image



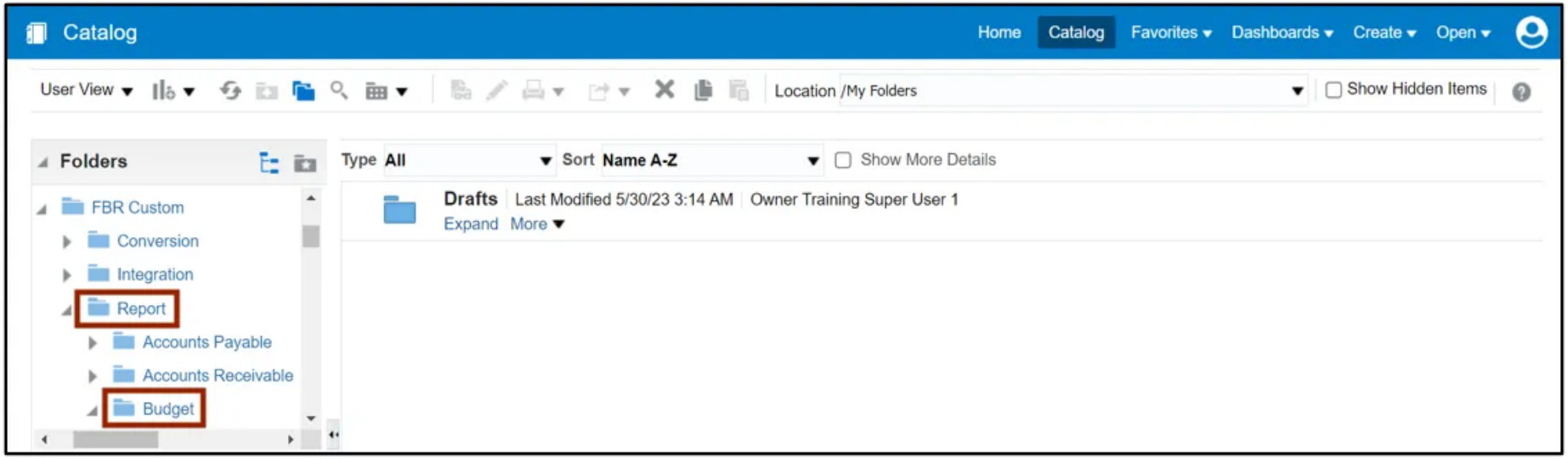
Step 3. Under the **Folders** pane, click the **Shared Folders** and then click the **Custom** folder. Furthermore, click the **FBR Custom** folder.

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Step 4. Under the **FBR Custom** folder, click the **Report** folder and then click the **Budget** folder.

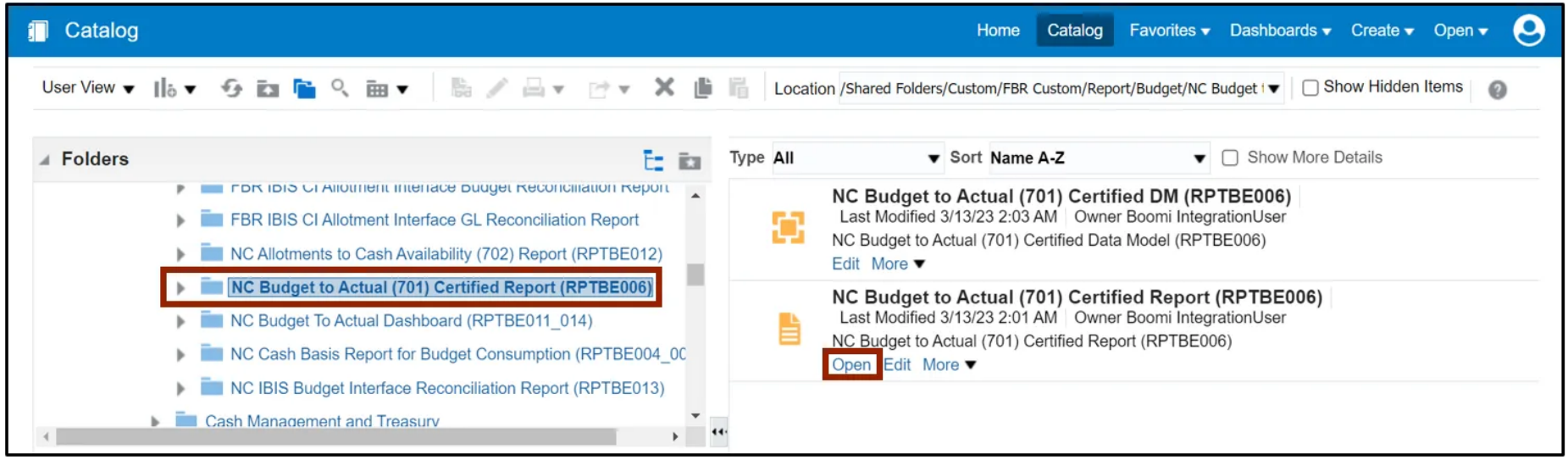
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Step 5. Click the **NC Budget to Actual (701) Certified Report (RPTBE006)** folder and then click the **Open** link under the **NC Budget to Actual (701) Certified Report (RPTBE006)** section.

Note : To run other reports, follow the same steps and select the appropriate report.

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Step 6. Select the applicable choices from the respective drop-down choice lists and click the **Apply** button.

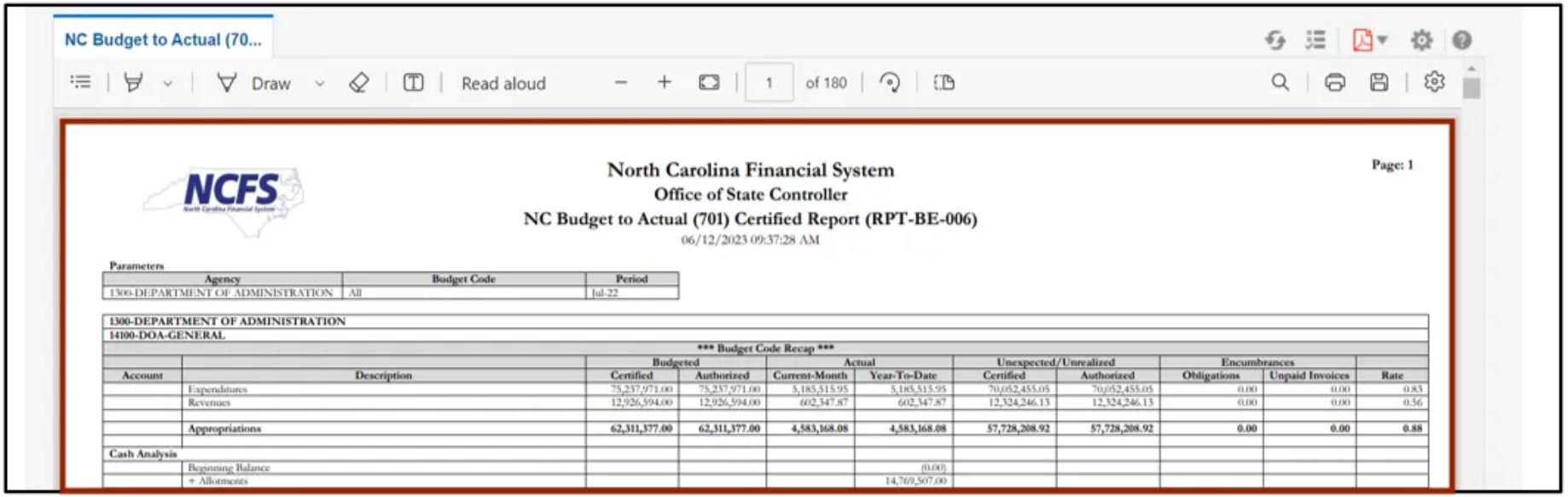
In this example, we choose **1300-DEPARTMENT OF ADMINISTRATION** for the ***Agency*** field, **All** for ***Budget Code*** field, and **Jul-22** for ***Period*** field.

Image



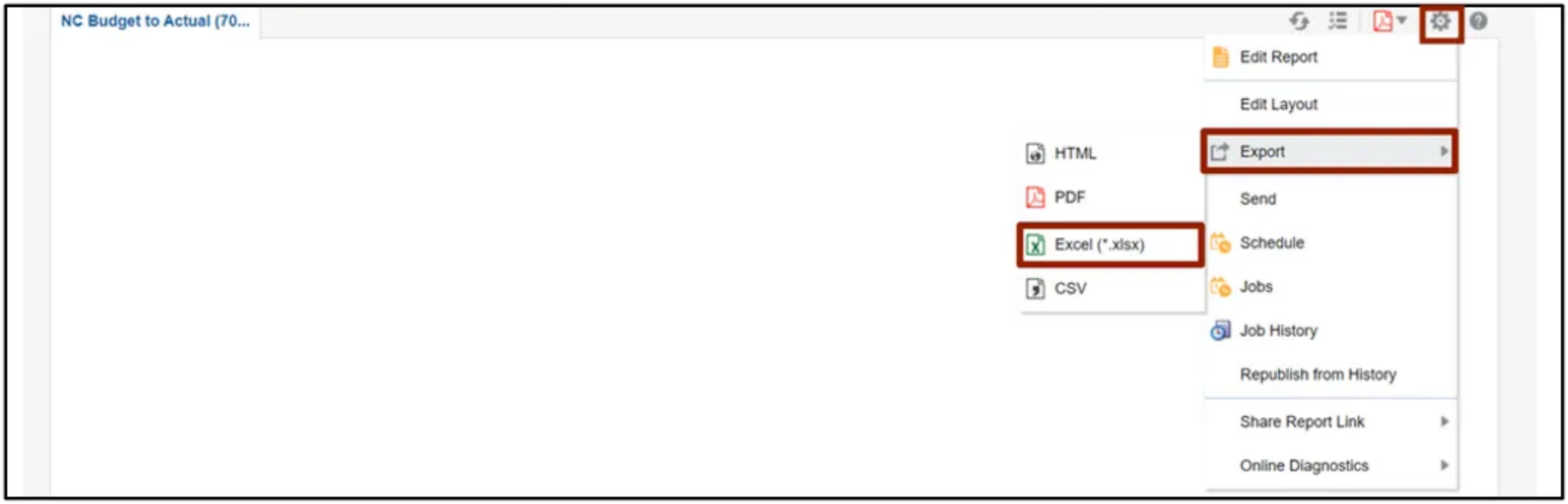
Step 7. Scroll down, validate, and confirm the data elements within the report.

Image



Step 8. To export the report in desired format, click the **Action** icon and select the **Export** option from the drop-down choice list. Then click the **Excel (*.xlsx)** option to download the report in excel format.

Image



Wrap-Up

Run Budget Reports using the steps above, to view the control budgets, budget accounts, and budget periods as well as to analyze the budget consumption and analyze the available funds.

Additional Resources

- Web Based Training (WBT)
  - BU001- Budget Inquiry

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