



# Viewing Grant Budget Data In BannerWeb

Library and Information Services

Revised December 13, 2007

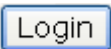
## How To View Grant Information

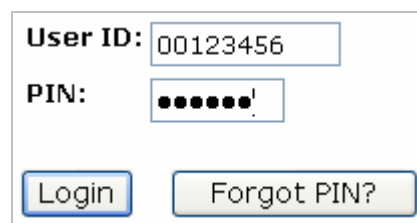
1. Start Banner Web in one of the following ways:

- In the **Address** field of your browser, type **go/banner** and then press .
- On the Middlebury College home page, click .

The BannerWeb User Login page opens.

2. Log into BannerWeb.

- a. In the **User ID** field, enter your College ID number padded with leading zeros to 8 digits.
- b. In the **PIN** field, enter your BannerWeb PIN.
- c. Click . The BannerWeb menu opens.

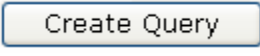


The form shows a 'User ID' field with the value '00123456', a 'PIN' field with masked characters '\*\*\*\*\*', and two buttons: 'Login' and 'Forgot PIN?'.

3. Click on **FINANCE INFORMATION**.

4. Click on **Grant/Budget Queries**.

5. From the **Type** drop-down list, select **Budget Status by Account**.

6. Click .

7. Select the parameters to view your grant. The ones that generate information most commonly sought have been checked:

- Year to Date (for grants this generates information that includes *Inception To Date*)
- Accounted Budget (the budget for your grant reflecting any adjustments)
- Commitments (this shows you any encumbrances)
- Available Balance (budget minus expenses and encumbrances)

8. Click .

9. Enter Grant Fund details:

- The **Fiscal year** drop-down list defaults to the *current* fiscal year, leave it as such.
- The **Fiscal period** drop-down list defaults to **14**; this indicates *To Date* without having to determine the fiscal month, so you should leave this as well.
- In the **Grant** field, enter your **Grant Fund Number** (if you enter it in the **Fund** field, your results will be false).
- Leave the **Fund Type** field blank.

**Fiscal year:** 2008   
**Fiscal period:** 14   
 265148    
 **Include Revenue Accounts**

10. Click  ( will not work).

11. Your display will look similar to the one below. To see additional account codes click .

*Query Results*

Account	Account Title	GY06/PD02 Budget	Accounted	GY06/PD02 Year to Date	GY06/PD02 Commitments	GY06/PD02 Available Balance
601100	Faculty Salaries		13,250.00	28,043.49	0.00	( 14,793.49)
604110	Middlebury Undergraduate Student Wa		38,672.00	12,746.46	0.00	25,925.54
605101	FICA		0.00	0.00	0.00	0.00
702140	Other Equipment Expense		9,559.00	0.00	0.00	9,559.00
702210	Academic Equipment Expense-Under \$1		0.00	854.08	0.00	( 854.08)
702220	Academic Equipment Expense-\$1,000 T		0.00	7,130.00	0.00	( 7,130.00)
702310	Computers Expense		0.00	1,193.48	0.00	( 1,193.48)
702320	Printers Expense		0.00	153.11	0.00	( 153.11)
704020	College Store Expense		0.00	658.99	0.00	( 658.99)
704061	Hardware Expense- Academic Equipmnt		0.00	250.84	0.00	( 250.84)
704150	Other Supplies Expense		3,829.00	348.05	0.00	3,480.95
704151	Academic Consumables-Supplies		0.00	12,464.96	50.01	( 12,514.97)
706110	Food-College Travel Expense		0.00	86.13	0.00	( 86.13)
706120	Lodging-College Travel Expense		0.00	59.95	0.00	( 59.95)
706130	Miscellaneous-College Travel Expens		0.00	26.00	0.00	( 26.00)
Screen total			65,310.00	64,015.54	50.01	1,244.45
Running total			65,310.00	64,015.54	50.01	1,244.45
Report Total (of all records)			73,153.00	73,153.00	50.01	( 50.01)

12. From the **Query Results** screen, you can do the following two things:


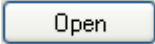
- You can click the **Document Code** links (numbers in blue text) to see more detail about expenditures or the budget, such as the one below.

*Document List*

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
Oct 09, 2008	Oct 10, 2008	<a href="#">I0102375</a>	Nen Life Science-Perkin Elmer	350.00	INEI
Sep 17, 2008	Sep 17, 2008	<a href="#">I0099076</a>	Aubuchon W E Co Inc	17.70	INNI
Aug 13, 2008	Aug 14, 2008	<a href="#">I0095563</a>	ICN Biomedicals Inc	382.00	INEI
Aug 12, 2008	Aug 13, 2008	<a href="#">I0095516</a>	California Fine Wire Company	99.24	INEI
Aug 12, 2008	Aug 13, 2008	<a href="#">I0095513</a>	Fisher Scientific	303.60	INEI
Aug 11, 2008	Aug 12, 2008	<a href="#">I0095251</a>	Fisher Scientific	432.68	INEI
Aug 08, 2008	Aug 11, 2008	<a href="#">I0095162</a>	Invitrogen/Life Tech/Gibco	443.00	INEI
Aug 05, 2008	Aug 06, 2008	<a href="#">I0094684</a>	Fisher Scientific	347.89	INEI
Aug 05, 2008	Aug 06, 2008	<a href="#">I0094681</a>	Fisher Scientific	197.31	INEI
Aug 05, 2008	Aug 06, 2008	<a href="#">I0094666</a>	Fine Science Tools Inc	87.50	INEI
Aug 05, 2008	Aug 06, 2008	<a href="#">I0094647</a>	Sigma-Aldrich Marketing Inc	157.81	INEI
Jul 22, 2008	Jul 23, 2008	<a href="#">I0092971</a>	Fisher Scientific	282.12	INEI
Jun 30, 2008	Jul 10, 2008	<a href="#">I0091339</a>	Fisher Scientific	300.12	INEI
Jun 30, 2008	Jul 03, 2008	<a href="#">I0090495</a>	Epicentre	186.00	INEI
Jun 30, 2008	Jul 07, 2008	<a href="#">I0090486</a>	Fisher Scientific	1,032.29	INEI
Screen Total:				4,619.26	
Running Total:				4,619.26	
Report Total (of all records):				12,464.96	

Adjusted Budget: 0.00

Next 15>

- To export the data into an Excel spreadsheet, click  further down the **Query Results** screen. The **File Download** dialog box opens. Click . The following suggestions for cleaning up the resulting Excel spreadsheet will give you results similar to that on the next page, please do the steps in the order below:
  - Delete Row 2. (You may have to use a right-click to perform deletions)
  - Delete Rows 5-12.
  - Delete Columns B-I.
  - Delete Columns D-K.
  - Make Column A narrower.
  - Make Column C wider.

- g. From the **File** menu, select **Page Setup**, and then click the **Fit to** radio button and leave the **1** in the following field. If it doesn't fit in **Portrait** mode you can change to **Landscape** on the Page Setup dialog box.
- h. After these adjustments, you may print and/or save the file (giving the file a logical name and location).

	A	B	C	D	E	F	G	H
1	Grant Inception to Date Report							
2	Period Ending Jun 30, 2008							
3	As of Oct 26, 2007							
4								
5	Grant:268104 [Grant Title Appears Here]							
6								
7								
8	chart	Account	Account Title	Accounted	Year to Da	Commitme	Available Balance	
9	1	601100	Faculty Salaries	13250	28043.49	0	-14793.5	
10	1	604110	Middlebury Undergraduate Student Wa	38672	12746.46	0	25925.54	
11	1	605101	FICA	0	0	0	0	
12	1	702140	Other Equipment Expense	9559	0	0	9559	
13	1	702210	Academic Equipment Expense-Under \$1	0	854.08	0	-854.08	
14	1	702220	Academic Equipment Expense-\$1,000 T	0	7130	0	-7130	
15	1	702310	Computers Expense	0	1193.48	0	-1193.48	
16	1	702320	Printers Expense	0	153.11	0	-153.11	
17	1	704020	College Store Expense	0	658.99	0	-658.99	
18	1	704061	Hardware Expense- Academic Equipmnt	0	250.84	0	-250.84	
19	1	704150	Other Supplies Expense	3829	348.05	0	3480.95	
20	1	704151	Academic Consumables-Supplies	0	12464.96	50.01	-12515	
21	1	706110	Food-College Travel Expense	0	86.13	0	-86.13	
22	1	706120	Lodging-College Travel Expense	0	59.95	0	-59.95	
23	1	706130	Miscellaneous-College Travel Expens	0	26	0	-26	
24	1	706210	Airline-College Travel Expense	0	583	0	-583	
25	1	709920	Sponsored Activities Benefits Exp	7843	8538.71	0	-695.71	
26	1	710100	Films and Video Expense	0	15.75	0	-15.75	
27								
28								
29	Report Total (of all records):			73153	73153	50.01	-50.01	
30								