How To View Budgets In BannerWeb

**BannerWeb** can be accessed directly from the Middlebury College or the MIIS homepages, which bring you first to Banner Self-Service.

Login is required. Enter your employee ID number and pin. Click on the **Login** button.
Click Budget Queries.

You will be creating a New Query. Select Budget Status by Account from the drop-down menu. This is the report most frequently used. Click on the Create Query button.
Check these 4 boxes: Accounted Budget, Year to Date, Commitments, and Available Balance. Then simply click on the Continue button.
Select the **Fiscal** year and **Fiscal period** from the drop-down menus. The Fiscal Period refers to the month of the Fiscal Year, so July = 01, August = 02, etc. **Enter 14 to see the entire fiscal year regardless of the current month.**

**Note:** you can also compare any two fiscal years, any two fiscal periods, by changing the Comparison fields from "None."

**Commitment Type:** Leave as **All**.

In the **Chart of Accounts** field, enter 1.

**Special Chart Note for MIIS!....as of July 1, 2011, MIIS financial data is on Chart 1.**
- For FY12 information, be sure to enter ‘1’ in the Chart of Accounts field, and use your new index, fund and org codes.
- If you want to view FY11 or prior fiscal years for historical data, you must enter ‘2’ in the Chart field and use your old index, fund and org codes.
- Due to chart differences, you will not be able to compare FY12 to FY11 in one query.

In the **Index** field, type your **Index**. (If you don't have an Index code, simply enter the Fund and Org codes.)

Click the **Include Revenue Accounts** check box, if you wish to see Revenue accounts.

You may leave the remaining fields blank. Click **Submit Query**.

BannerWeb translates the **Index** into the **Fund-Organization-Program** codes and redisplay the page with these fields populated.
Click **Submit Query** again.

The resulting screen contains data in the 4 columns requested, by Account code.

Clicking on an **amount in blue** in either the Accounted Budget or the Year to Date column enables you to **drill down** to view **Transaction Details** by date, vendor, etc.

To return to the report screen from this drill-down screen, click on the **back arrow**.
Another feature of the report screen is the capability to **download the data** to Excel.

Click on the **Download Selected Ledger Columns** button
Excel will open automatically, filled with the columns of data. If you choose to save this document to your computer, select .xls as the type of file when you save.

To close out of BannerWeb securely, click on the EXIT link at the top of the screen.

BannerWeb maintains a 30-minute allowance for inactivity. If you return to a screen that has been open yet inactive for more than 30 minutes, you will be taken back to BannerWeb’s opening login screen. Simply enter your credentials, click Login, and repeat the process.

Please feel free to contact the Budget Office if you have any questions or difficulties.