How To View Grant 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 on **Finance Information**
Click \textit{Grant/ Budget Queries}.

You will be creating a new query, by Account. Click on the \textit{Create Query} button.
Check the 4 boxes: Year to Date, Accounted Budget, 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, September = 03, etc. Enter 14 to see the entire fiscal year regardless of the current month.

In the Chart of Accounts field, enter 1 for Middlebury College and enter 2 for MIIS. MIIS financial data will be on Chart of Accounts 1 as of 7/1/11, FY12 going forward.

In the Grant field, type your Grant number. Don’t worry about the Fund Type field. (Note: For data privacy, the Grant number has been hidden in these instructions)

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

Click Submit Query.

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**.

If your Grant’s data cannot fit on one screen, you will see this **Next 15** button. Click to see the next 15 Account codes.
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 logon screen. Simply enter your credentials, click Logon, and repeat the process.

Please feel free to contact the Cory Buxton x.5813 or the Budget Office x.5725 if you have any questions or difficulties.

Instructions written by Susan Simmons, Budget Office