



## Spreadsheet Budgeting Using Banner 7

### Job Aid: Downloading from Budget Development

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#### Procedure

Follow these steps to download data from Budget Development using the Download Wizard.

Note: This job aid also contains the steps required to select FOAPAL elements.

Step	Action
1	Select the <u>Spreadsheet Budgeting</u> option from the Banner pull-down menu in Microsoft Excel.
2	Select the <u>Download Wizard</u> option from the Spreadsheet Budgeting sub-menu.
3	Select the <b>Budget Development</b> radio button.
4	Click the <b>Next</b> button.
5	Specify required information for the download of budget data. Select the budget table from which data is to be downloaded by clicking one of the two radio button choices.  <u>Note:</u> The Budget Line Item Table looks at the FBBBLIN table for the download. The Distributed Budget Table looks at the FBRDIST table for the download.  <u>Example:</u> Budget Line Item Table
6	Click the <b>Next</b> button.
7	Select the chart of accounts. Even though many institutions will have multiple charts of accounts, you can select only one.  <u>Example:</u> B
8	Click the <b>Next</b> button.
9	Select the Budget ID(s). Select multiple Budget IDs by using the Shift-click or Ctrl-click commands.  <u>Example:</u> 2005
10	Click the <b>Next</b> button.
11	Select the Phase Code(s) to be included for the Budget ID(s) that you will download. Select multiple Phase Codes by using the Shift-click or Ctrl-click commands.  <u>Example:</u> LY04B
12	Click the <b>Next</b> button.



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### Job Aid: Downloading from Budget Development (Continued)

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#### Procedure, continued

Step	Action
13	Select the type(s) of Budget Development data that you want to download. Select multiple data types by using the Shift-click or Ctrl-click commands.  <u>Example:</u> Budget
14	Click the <b>Next</b> button.
15	Click the <b>Next</b> button.  <u>Note:</u> If you are not going to limit the amount of data downloaded by specifying FOAPAL elements, then click the <b>Finish</b> button to begin the download process. Otherwise, click the <b>Next</b> button.
16	Select the Fund Code(s). You have the choice of selecting all/one/none of the Fund Codes displayed. Select multiple Fund Codes by using the Shift-click or Ctrl-click commands.  <u>Note:</u> If no Fund Code is selected, than all Fund Codes associated with previous wizard choices will be downloaded.  The above is true for selecting all of the FOAPAL elements to follow.  <u>Example:</u> 1110
17	Click the <b>Next</b> button to continue narrowing FOAPAL elements or click <b>Finish</b> to download data as is.  You will have this choice throughout the process of narrowing FOAPAL elements.
18	For this exercise, select two Organization Codes. Select the first Organization Code you would like by clicking it.  <u>Example:</u> 11101

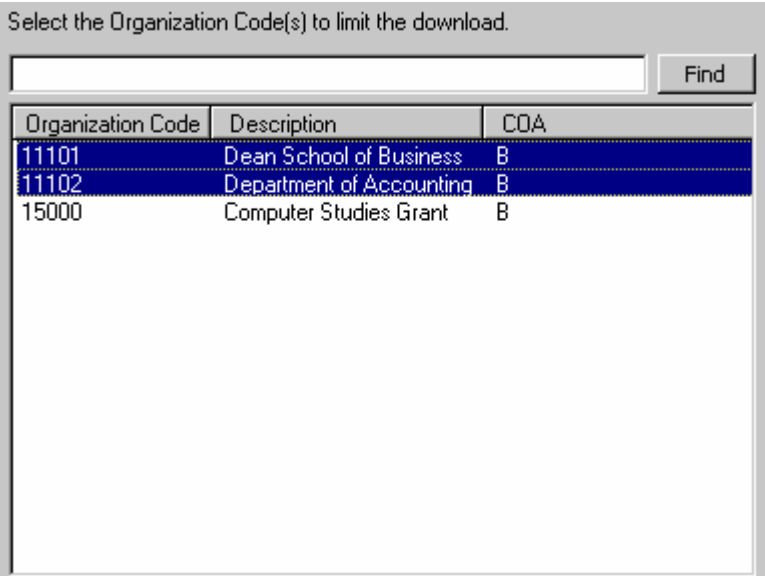


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#### Procedure, continued

Step	Action
19	<p>Hold Control and click the second Organization Code that you would like to select.</p> <p><u>Example:</u> 11102</p> 
20	Click the <b>Next</b> button.
21	<p>For this exercise, select all Account Codes by clicking the <b>Next</b> button.</p> <p><u>Note:</u> By simply clicking the <b>Next</b> button, the Download Wizard assumes that we want to select all Account Codes.</p>
22	<p>Select the Program Code(s).</p> <p><u>Example:</u> 10</p>
23	Click the <b>Next</b> button.

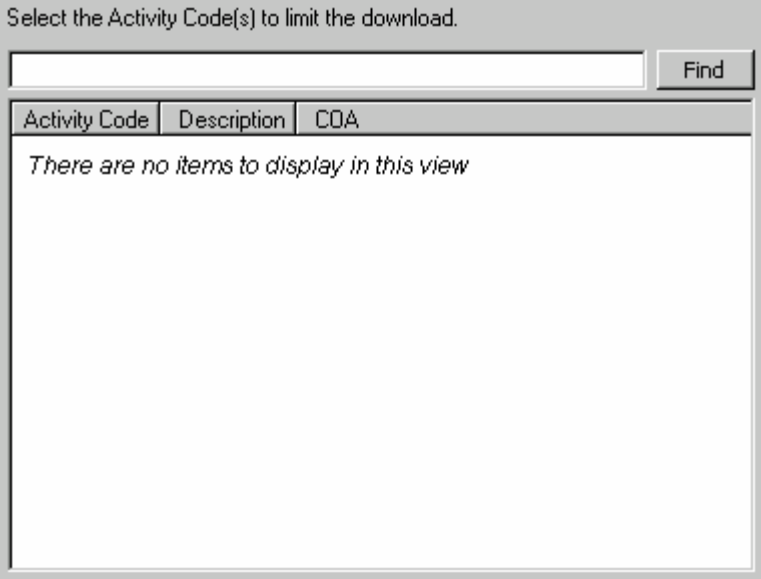


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#### Procedure, continued

Step	Action
24	<p>Select the Activity Code(s).</p> <p><u>Example:</u> In some cases, there may not be certain codes that display. Therefore, you would not be able to select any.</p> 
25	Click the <b>Next</b> button.
26	Select the Location Code(s).
27	<p>Click the <b>Finish</b> button.</p> <p><u>Note:</u> Clicking the <b>Finish</b> button will allow you to view the generated worksheet in Excel.</p>
28	Scroll right to view the entire spreadsheet.