Procedure

Follow these steps to download data from the Grant Ledger using the Download Wizard.

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

Step	Action
1	Select the Spreadsheet Budgeting option from the Banner pull-down menu in Microsoft Excel.
2	Select the Download Wizard option from the Spreadsheet Budgeting sub-menu.
3	Select the **Grant Ledger** radio button.
4	Click the **Next** button.
5	Select the chart of accounts. Even though many institutions will have multiple charts of accounts, you can select only one. Example: B
6	Click the **Next** button.
7	Select the Grant Code(s). Select more than one by using the Shift-click or Ctrl-click commands. Example: G00000001
8	Click the **Next** button.
9	Select the Grant Year for each Grant Code displayed. Select multiple Grant Years by using the Shift-click or Ctrl-click commands. Example: 03
10	Click the **Next** button.
11	Select the Grant Period. You can select only one. Example: 14
12	Click the **Next** button.
13	Select the type(s) of data that you want to download. Select more than one by using the Shift-click or Ctrl-click commands. Example: Adopted Budget
14	Click the **Next** button.

Procedure, continued

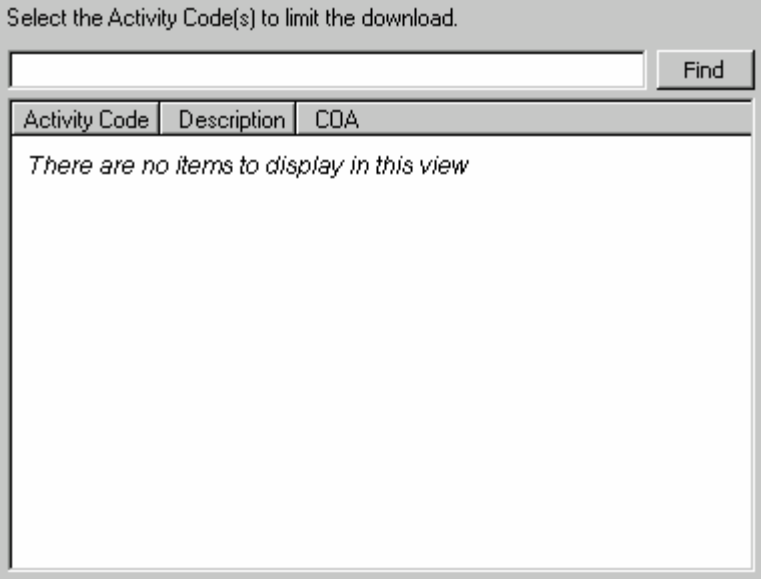| Step	Action
15	Click the **Next** button. Note: If you are not going to limit the amount of data downloaded by specifying FOAPAL elements, then click the **Finish** button to begin the download process. Otherwise, click the **Next** button.
16	Select the Fund Code(s). You have the choice of selecting all/one/none of the Fund Codes displayed. Select multiple Fund Codes by using the Shift-click or Ctrl-click commands. Note: 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. Example: 2200
17	Click the **Next** button to continue narrowing FOAPAL elements or click **Finish** to download data as is. You will have this choice throughout the process of narrowing FOAPAL elements.
18	Select the Organization Code(s). Example: 15000
19	Click the **Next** button.
20	For this exercise, select all Account Codes by clicking the **Next** button. Note: By simply clicking the **Next** button, the Download Wizard assumes that we want to select all Account Codes.
21	Select the Program Code(s). Example: 20
22	Click the **Next** button.

Procedure, continued

Step	Action
23	Select the Activity Code(s). Example: In some cases, there may not be certain codes that display. Therefore, you would not be able to select any. Select the Activity Code(s) to limit the download. [ ] Find Activity Code | Description | COA *There are no items to display in this view*
24	Click the **Next** button.
25	Select the Location Code(s).
26	Click the **Finish** button. Note: Clicking the **Finish** button will allow you to view the generated worksheet in Excel.
27	Scroll right to view the entire spreadsheet.