



# Budget Query Quick Guide

## Quick Steps for a Basic Budget Query by Account

*provides detailed information on budget and year-to-date spending  
for a selected Index Code broken down by Account Code*

for complete instructions, go to: [www.isu.edu/tigeri/training](http://www.isu.edu/tigeri/training)

**Only Account Directors, ReqMasters, and others granted lookup access can perform budget queries.**

1. Open BengalWeb – [bengalweb.isu.edu](http://bengalweb.isu.edu). Click on the **Finance** tab.
2. Go to the **Finance Information** channel, and click on “**Check Budget & Expenditure Information.**”
3. Select “**Budget Status by Account**” from the dropdown list next to **New Query Type**, then click the **Create Query** button.
4. Check the columns you wish to view in your query, then click **Continue. Recommended:** Adopted Budget, Accounted Budget, Year to Date, Encumbrances, Reservations, and Available Balance.
5. Enter the parameters for your query in the appropriate fields.

**Recommended:**

**Fiscal Year:** Defaults to current year

**Fiscal Period:** 12 (shows entire fiscal year, regardless of current month)

**Comparison Fiscal year:** none

**Comparison Fiscal period:** none

**Commitment Type:** Defaults to “All” (do not change)

**Chart of Accounts:** Defaults to “9” (do not change)

**Index:** Enter Index Code to query. **Note:** To look up your new Banner Index Codes, go to the **Help with Finance & Purchasing Channels** channel in BengalWeb and select “**Look Up Index Codes.**”

6. Click **Submit Query** at the bottom of the screen.
7. Banner fills in the Fund/Organization/Program Codes corresponding to the Index Code you entered. Click **Submit Query AGAIN.** Your query results are displayed.

### Additional Options & Tips:

- Click on any of the **blue hyperlinks** to view additional information. Click on any subsequent links that are displayed to “drill down” further.
- Click on the **Next 15>** button at the bottom of the screen to see information on additional Account Codes.
- Click on the **Download Selected Ledger Columns** button to transfer your information to an Excel spreadsheet.
- Enter a name for your query in the field next to the **Save Query as** button, then click on the button to save your query. In the future, instead of beginning by creating a new query, you can retrieve this existing query from your saved queries list.
- You may use the **back and forward arrow buttons** on your browser to move between screens. *It is OK to do this in Banner Finance, although it is NOT OK while working with Banner Employee information, such as Time Sheets.*
- Links to other tasks you may perform in Banner Finance are available at the very bottom of your screen. Click on one to go directly to that function.

**Need Help? Call the IT Service Desk: 282-4357 (HELP) [help@isu.edu](mailto:help@isu.edu)**