Banner Budget Inquiry
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**FGIBAVL – Budget Availability Status Form**

The Budget Availability Status Form provides a summarized view by budgeted pooled accounts of a department’s budget, expenditures, commitments, and available balances.

To view data on this form, enter the following information:

1. The COA field and Fiscal Year field will default to the current fiscal year values. Leave these as the default unless you would like to view prior years.
2. In the Index field, enter your Index then press the Tab key on your keyboard. The Fund, Organization and Program Fields will automatically be populated - do not change the fields. **Note: If you do not know your Index, click on the Search button (the ellipsis ...) next to the Index field for a list of Indexes.**
3. In the Account Field, enter 600000 to view all pools. The only pools you are responsible for are:
   - 612000 – Discretionary Personnel Services (P.S.)
   - 612010 – Pool Lectures – Teaching – Academic Area only
   - 700000 - Other Expenses (O.E.)
4. Click the Go button to view details.
**FGIBDSR – Executive Summary Form**

The Executive Summary form provides a summarized view by ALL accounts of a department’s budget, expenditures, commitments, and available balances. This form can be used to navigate to a more detailed view of the amounts and documents related to each individual account.

To view data on this form, enter the following information:

1. The COA field and Fiscal Year field will default to the current fiscal year values. Leave these as the default unless you would like to view prior years.

2. In the Index field, enter your Index then press the Tab key on your keyboard. The Fund, Organization and Program Fields will automatically be populated - do not change the fields. **Note:** If you do not know your Index, click on the Search button *(the ellipsis ...)* next to the Index field for a list of Indexes.

3. To view all accounts, leave the Account field blank. To view Other Expenses (O.E.) only, in the Acct Type field, enter 70 (this will give you the O.E. available balance).

4. Click the Go button to view details.

**Detailed Information for Specific Transactions**

To view more detailed information for a specific account:

1. Click once in the Acct field for that account

2. Click on the Related button, then Transaction Detail Information. This will list all of the transactions associated with that account.

To view more detailed information for specific transaction (excluding MC transaction types):

1. Click once in the Acct field for that transaction
2. Click on the Related button, then Query Document
3. Click the Go button to view Header information (creation date, amount, etc)
4. To view a detailed description, click on the Tools menu, then Commodity or Accounting Information.
**FGIOENC – Organizational Encumbrance List Form**

The Organizational Encumbrance List form lists all the open encumbrances for a specific department. This form can be used to navigate to a detailed view of each individual open encumbrance.

To view data on this form, enter the following information:

1. The Chart field and Fiscal Year field will default to the current fiscal year values. Leave these as the default unless you would like to view prior years.
2. In the Index field, enter your Index then press the Tab key on your keyboard. The Fund and Organization fields will automatically be populated - do not change the fields. *Note: If you do not know your Index, click on the Search button (the ellipsis ...) next to the Index field for a list of Indexes.*
3. Click the Go button to view details.

**Detailed Information for a Specific Encumbrance**

To view more detailed information regarding a specific encumbrance:

1. Click once in the Encumbrance field for that encumbrance.
2. Click on the Related button, then Query Detail Encumbrance Info.
**FGIENCD – Detail Encumbrance Activity Form**

The Detail Encumbrance Activity form provides a detailed view of a specific encumbrance (e.g. purchase orders, personal service agreements). This form also illustrates any changes (e.g. additional funds, payments, and liquidation) to the encumbrance.

**Note:** When you click on Query Detail Encumbrance Info from the FGIENC form, you are brought to this form

To view data on this form, enter the following information:

1. In the Encumbrance field, enter the Encumbrance number. You can retrieve the Encumbrance number from the Encumbrance field on the FGIENC form.
2. Click the Go button to view details.
**FOIDOCH – Document History Form**

The Document History form illustrates the document history for a specific document (e.g. purchase order, invoice, etc.) and all of the documents related to it.

*Note: the form cannot be used to access information about Travel authorizations or personal service agreement (PSA) documents.*

To view data on this form, enter the following information:

1. In the Document Type field, enter the document type using one of the following common codes (for additional codes, click on the Search button (the ellipsis ...) and select from the list):
   
   a. INV Invoices  
   b. PO Purchase Orders  
   c. REC Receiving Documents  
   d. REQ Requisitions  

2. In the Document Code field, enter the full document number including preceding letters (i.e. purchase order number PC004843)  

3. Click the Go button to view details.
Detailed Information for a Specific Document

To view more detailed information regarding a specific document:

1. Click once on the document number for that document.
2. Click on the Related button, then click on Query Document.
3. You will be routed to a separate screen, click on Go to view the information.