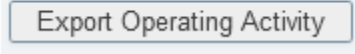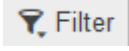# FGIOPAL: Reviewing & Exporting Budget Detail Information

General Information

The **Operating Activity Query & Export [FGIOPAL]** form allows for users to review and export detail budget level data as Excel file (CSV) and report detail for budgets, actuals and encumbrances. This will enable users to choose certain parameters, such as fiscal period, subaccount category, etc. so that data can be manipulated according to users' needs. As always, Banner questions may be sent to bannerhotline@odu.edu

How to view Transaction History and Details:

Actions and Steps	Helpful Tips & Tricks
1. Access the **Operating Activity Query & Export Form [FGIOPAL]**.	Type **FGIOPAL** in the **Search Block** field on the **Old Dominion University Home Screen** and press **Enter**.
2. The **Operating Activity Query & Export Form [FGIOPAL]** contains one block to initiate a search which auto-populates: ◈ **Chart of Accounts**: Defaults to "**U**"	This will allow you to access all Budget accounts stored in the Banner system. You will be able to narrow your query search after executing the search and further accessing the form. *See Step 4*.
3. Click the **Go Button** to load all the information about the Document.	**Go Button** or **Down Arrow** may be used. Go ⬇
◈ The form allows users to narrow their search parameters within each information block and export the data into an Excel spreadsheet. You may do this by selecting the **Filter Button**. In the middle section of the form, the "Operating Activity," users may filter their search by the following criteria: ◈ Fiscal Year ◈ Fiscal Period* ◈ Activity Settings/Account Category ◈ Organization Budget Code ◈ Excel or CSV Export options Simply click the **Filter Button** in this section to access and enter your preferred search criteria, as listed above.	The **Filter Button** may be used to narrow your search in this form. **Filter Button:** ▼ Filter *The **Fiscal Period** field tells you which accounting period the transaction posted to. *(i.e.: Fiscal Year July – FP01 – June, FP12 with Accrual, FP14).* *This form is a query search form and allows flexibility with search criteria. After selecting preferred search criteria, users may export the data into an Excel or CSV document and save or print the document.*
4. After entering your search criteria (*for example, **Organization Budget Code** and **Fiscal Year***), click the **Filter Go Button**. Your search will execute.	**Filter Go Button:** Go
5. If you prefer to export this data after executing the above search, Select your **Export Format (Excel or CSV) Radio Button** you prefer and click the **Export Operating Activity Button**. After doing so, a pop-up window will display, select the **OK Button** and the spreadsheet in your chosen format will automatically display. You may Save or Print this spreadsheet.	**Export Format Radio Buttons** and **Export Operating Activity Button**: Export Format ⦿ Excel ○ CSV Export Operating Activity
6. If you wish to perform research with different search criteria, click the Filter button. This will allow you to re-enter search parameters.	**Filter Button:** ▼ Filter
7. Remember to log out of Banner when you leave your desk.	Click the **ODU Home Screen** button on the toolbar.

FGIOPAL Sample Screenshot:

Filter Options Screenshot:

Helpful Tips & Tricks:

◈ This form is a filter-only form – you may filter most any of the fields displayed in the Filter section!

◈ Remember to refer to the Office of Finance Directory on the website at: https://www.odu.edu/finance/directory.