

FI Self Service Quick Reference-Encumbrance

Encumbrance Queries

The screenshot shows a web-based form for creating an encumbrance query. The form is divided into several sections. At the top, there is a section for 'Existing Query' with a pull-down menu set to 'None' and a 'Retrieve Query' button. Below this is the main query creation section. It includes fields for 'Fiscal year' (set to 2003) and 'Fiscal period' (set to 12). There are also pull-down menus for 'Encumbrance Status' (set to Open) and 'Commitment Type' (set to All). A grid of input fields follows, with 'Chart of Accounts' set to 'T'. Other fields include 'Fund', 'Organization', 'Grant', 'Account', 'Program', 'Index', 'Activity', 'Location', 'Fund Type', and 'Account Type'. At the bottom of the form, there is a 'Save Query as:' field, a checkbox for 'Shared', and a 'Submit Query' button. Ten numbered callouts provide instructions: 1. Pull-down list of available templates (points to Existing Query); 2. Creating a New Query (points to Retrieve Query); 3. Enter the Fiscal Year (points to Fiscal year); 4. Select the Fiscal Period (Jul.=1, Jun. =12) (points to Fiscal period); 5. Select the Encumbrance Status (Open, Closed or All) (points to Encumbrance Status); 6. Select the Commitment Type (All, Uncommitted, or Committed) (points to Commitment Type); 7. Chart is "T" (points to Chart of Accounts); 8. Enter the "Index" Number (points to Index); 9. You may limit your query to specific account codes (points to Account Type); 10. Click button to submit query (points to Submit Query). A note states: 'These numbers will populate once you submit a query'.

Existing Query: None (Pull-down list of available templates)

Retrieve Query (Creating a New Query)

Fiscal year: 2003 (Enter the Fiscal Year)

Fiscal period: 12 (Select the Fiscal Period (Jul.=1, Jun. =12))

Encumbrance Status: Open (Select the Encumbrance Status (Open, Closed or All))

Commitment Type: All (Select the Commitment Type (All, Uncommitted, or Committed))

Chart of Accounts: T (Chart is "T")

Index: (Enter the "Index" Number)

Account Type: (You may limit your query to specific account codes)

Save Query as: (These numbers will populate once you submit a query)

Shared (checkbox)

Submit Query (Click button to submit query)