Budgets Overview Inquiry for Encumbrances

This documentation will outline the best way to review your open Purchase Orders and remaining Encumbrances.

The inquiry we’ll use is the Budgets Overview Inquiry. Please refer to the Budgets Overview Inquiry Tip Sheet for completion of Steps 1 and 2 as well as to provide more details on the parameters inquiry.

Step 3: The Budgets Overview Inquiry Criteria for Encumbrances

Enter your fund number and department number (if appropriate).

Once all search criteria are entered, click . This will save the entered set of search criteria. On subsequent visits to the budgets overview screen, choosing the “Find Existing Value” on the first page will allow for this search page to be brought up immediately.

Once all information has been provided, click . This will bring up a summary of expenditures or revenue for the selected funds. An example is shown in Step 4.
Step 4: Budgets Overview Inquiry Results

The top section of the budgets overview screen will display a summary of fund/department activity.

The lower section contains detailed information.

The “Document Label” and “Document ID” display the type of document (Purchase Order, Voucher, etc) and document number.

Enhanced drill down capabilities – click on the magnifying glass.

Click the “Display open encumbrances only” box.

Click on the Encumbrance total for more details.

Amount of the Open Encumbrances
Clicking on the magnifying glass will bring you to the Purchase Order Line Drill Down.