

# Step-by-Step Guide to Encumbrance Query

Query Encumbrance link allows you to review encumbrance information. This includes Purchase Order encumbrances to external vendors as well as internal WSU encumbrances for salaries & benefits, telephone line charges, data processing charges, etc. This does not include Reservations (i.e. Banner purchase requisitions.)

## How to Use Query Encumbrance

1. Select **Query Encumbrance** from the Finance menu.
2. Enter the **Fiscal Year** and **Period**. **Encumbrance Status** may be ALL or OPEN. Enter your **accounting information**. **Grant or Organization is required**. (Organization must be a data-enterable org). Click the **Submit Query** button. (Figure 2)

WRIGHT STATE UNIVERSITY  
**WINGS EXPRESS** Your Self-Service Command Center

Personal Information Alumni and Friends Employee WebTailor Administration **Finance**

Search  Go MENU SITEMAP HELP EXIT

Choose an existing query and select Retrieve Query or create a new query. Select Submit Query to display the query results. For an Encumbrance Query to be successful, you must enter a value in the Organization Field or the Grant Field.

Existing Query  Retrieve Query

Fiscal year  Fiscal period

Encumbrance Status

Commitment Type

Chart of Accounts	<input type="text" value="W"/>	Index	<input type="text"/>
Fund	<input type="text" value="190000"/>	Activity	<input type="text"/>
Organization	<input type="text" value="218320"/>	Location	<input type="text"/>
Grant	<input type="text"/>	Fund Type	<input type="text"/>
Account	<input type="text"/>	Account Type	<input type="text"/>
Program	<input type="text"/>		

Save Query as:

Shared

**Figure 2**

**Note:** You can use "Code Lookup" to find accounting information by clicking on the field name button.

Query results are shown in Figure 3.

The screenshot shows a web browser window with the URL [https://oas5.wright.edu/pls/PROD/bwfrpqu.P\\_Encumb\\_Start](https://oas5.wright.edu/pls/PROD/bwfrpqu.P_Encumb_Start). The page title is "Report D - Microsoft Internet Explorer provided by Wright State University". The browser's address bar shows the URL and a search box. The page content includes a navigation menu with tabs for "Personal Information", "Alumni and Friends", "Employee", "WebTailor Administration", and "Finance". Below the menu is a search box and a "Go" button. A message says "Select a Document Code link to display accounting distributions for a specific document." The main content area is titled "Report Parameters" and "Organization Encumbrance Status Report". It includes the following information:

- Open Encumbrance Summary by Document, Account Distribution
- Period Ending Nov 30, 2008
- As of Nov 19, 2008
- Chart of Accounts W Wright State University
- Commitment Type All
- Fund Code 190000 Unallocated Current General Fund Program Code All
- Orgn Code 218320 R/E Information Services Activity Code All
- Account Code All Location Code All

The "Query Results" section contains a table with the following data:

Account Code	Document Code	Description	Original Commitments	Encumbrance Adjustments	Encumbrance Liquidations	Year to Date	Current Commitments	% Used	Cmt Type
611100	<a href="#">PR090002</a>	Encumbrance Salaries (Orig)	1,231,220.04	( 396,486.28)	.00	.00	834,733.76	.00	Uncommitted
621100	<a href="#">PR090002</a>	Encumbrance Salaries (Orig)	400,146.52	( 128,858.04)	.00	.00	271,288.48	.00	Uncommitted
739820	<a href="#">P0009331</a>	Everybodys Inc	11,622.96	.00	( 11,622.96)	11,623.11	.00	100.00	Uncommitted
755100	<a href="#">ENPH0905</a>	Encumber Line Charges W004LAM	7,904.82	.00	.00	.00	7,904.82	.00	Uncommitted
879300	<a href="#">ENR2009</a>	Debt Payment Fy09 W003JSR	34,306.00	.00	( 11,435.32)	.00	22,870.68	33.33	Uncommitted
879400	<a href="#">ENC2009</a>	Library Costs Fy09 W003JSR	95,097.00	.00	( 31,699.00)	.00	63,398.00	33.33	Uncommitted
Report Total (of all records)			1,780,297.34	( 525,344.32)	( 54,757.28)	11,623.11	1,200,195.74	4.36	

Below the table is a button labeled "Another Query".

**Figure 3**

This example shows various types of encumbrances

- PRyyxxxx: Payroll encumbrances for year (yy)
- Pxxxxx: Purchase Order
- ENPHyyxx: Telephone line charges for year (yy).
- ENxxxxxx: other internal WSU encumbrances.

The Original amount of the encumbrance is shown, along with any Adjustments/Liquidations, and YearToDate expenditures this fiscal year. The remainder appears as the Current Commitments balance. (WSU does not use the Commitment Type column at the far right, it will show Uncommitted.)

If there are amounts showing in the Current Commitments column for Purchase Orders that you believe should be closed out, please email the Purchasing Department [purchasing@wright.edu](mailto:purchasing@wright.edu) with the Purchase Order# and other relevant info. (Note that you can highlight the row in the query, use Alt-C to copy, then use Alt-V to paste into your email.

You may drill down on any of the documents to view additional information. This is most useful for Purchase Orders, see Figure 4 below for sample P0009331.

The screenshot shows a web browser window displaying the WINGS Express Finance system. The page title is "Report X2 - Microsoft Internet Explorer provided by Wright State University". The URL is [https://oas5.wright.edu/pls/PROD/bwfrpeu.P\\_ReportX2?coas=W&fund=190000&program=&orgn=218320&actv=&rl](https://oas5.wright.edu/pls/PROD/bwfrpeu.P_ReportX2?coas=W&fund=190000&program=&orgn=218320&actv=&rl). The page features a navigation menu with options: Personal Information, Alumni and Friends, Employee, WebTailor Administration, and Finance. A search bar is present with a "Go" button. Below the navigation, there is a message: "Select the Document Number link or the Document Code link to display the entire document." The main content area is titled "Selected Document Encumbrance Detail Status Report" and includes the following information: "By Document, Account Distribution", "Period Ending Nov 30, 2008", and "As of Nov 19, 2008". A "Chart of Accounts" table is displayed, showing details for document P0009331, document date Sep 12, 2008, and transaction description "Everybodys Inc". Below this, a "Document Detail" table provides a breakdown of encumbrances by document rule, class, original amount, adjustments, liquidations, year-to-date, item number, sequence number, fund, organization, account, and program. The table includes four rows of data, with the first row corresponding to document P0009331. At the bottom of the page, there are links for "Approve/Disapprove Documents", "View Document", "Create Expense or Budget Transfer", "Create and Approve WrightBuy Requisitions", "Query Budget", "Query Encumbrance", "Delete Finance Template", and "Wsu Finance Extensions". The page footer includes the release version "RELEASE: 7.1.0.1" and the logo for "powered by SUNGARD HIGHER EDUCATION".

Document Rule Code	Class	Original Encumbrance	Encumbrance Adjustments	Encumbrance Liquidations	Year to Date	Item Number	Sequence Number	Fund	Organization	Account	Program	Acti
P0009331	PORD	11,622.96	.00	.00	.00	1	1	190000	218320	739820	60005	
00081197	DNEI	.00	.00	.00	.00	1	1	190000	218320	739820	60005	
I0078090	INEI	.00	.00	.00	11,623.11	1	1	190000	218320	739820	60005	
I0078090	INEI	.00	.00	( 11,622.96)	.00	1	1	190000	218320	739820	60005	

Figure 4

Figure 4 shows documents related to P0009331. This includes the Ixxxxx related Accounts Payable invoices as well as related check numbers. You may drill down on the hilited document codes to View Document for additional information.