1. **BUDGET QUERIES:**
   
a. Under the Budget Queries link there are three methods of querying Budget information. They are listed below in detail.

1. **Budget status by account:** is used to view budget information for organizations detailed by account. You may wildcard either or both the Organization and Account

b. Select Budget Status by Account

c. Select ledger columns to view on the report.

d. Encumbrances – by selecting the Encumbrances check box, the report will show all those Purchase Orders that have been created against a specific Fund/org

e. Reservations – by selecting the Reservations check box, the report will show those Requisitions that have been created against a specific Fund/Org.

f. Commitments – by selecting the Commitments check box, the report will show a combination of Requisitions and Purchase Orders.

g. Year to date- shows year to date expenditures
h. Select Fiscal Year, 2007
i. Chart of Account will remain as Chart U.
j. Enter information to retrieve query.
k. Click on any one of the buttons, Chart of Accounts, Organization, etc to search against that particular field, select correct funding and Submit Query

Select columns to display in Budget Status report

Click Submit Query to view results
Note: The above figures are test data only and does not reflect any actual budget information.

1. To drill down further to look at transaction details, click on any of the numbers that are links.
2. This will allow you to view further documentation and reports on a specific transaction.
3. To view supporting and additional documents, click on the view documents link once inside a document and that will pull up Xtender with the associated Image.

2. **Budget Status by Organizational Hierarchy:** is used to view summarized budget information using actual or hierarchical organization or account codes.
   a. This report is used to break down the Status by Account report into segments.
   b. Organizational hierarchy, External Account type (levels 1&2), Account detail, Document detail and View the document are levels for this type of query.
3. **Budget Quick Query**: is used to view summarized budget information for organizations. This does not work with hierarchical organizations or account codes.

4. **ENCUMBRANCE QUERY**:  
   
   ![Image of Encumbrance Query](image)  
   
   a. Is used to view any outstanding Encumbrance information.  
   b. Any of the links can be used to query for that particular field. For example, by clicking on FUND, a search can be performed to view all available Funds. This access is restricted by Fund/Org Security and one can view only those FOAPAL’s that they have access to.  
   c. A query can be saved for future reference.  
   d. If a query is SHARED, everyone can view the query but cannot view the details of the query, as Fund/Org security will lock unauthorized persons to view Account details. Please do not share queries as that clutter up the queries that are saved on individual accounts, even though they may not use the shared templates.  
   e. Organization or Grant fields are required to view encumbrance information. Wildcards are permitted in these fields, although access is controlled by Fun/Organization security.