

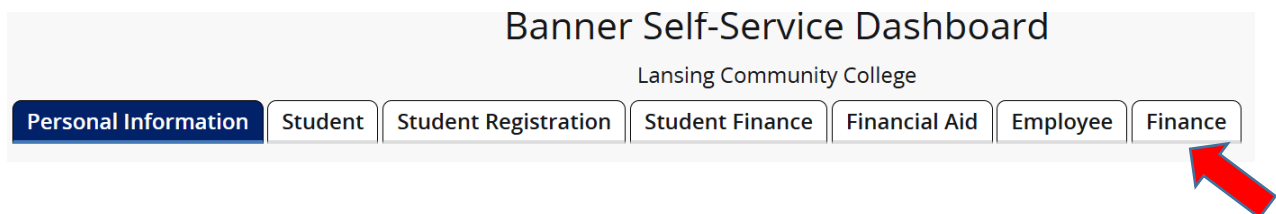
Navigating to Finance Encumbrance Query – Banner Self-Service

Purpose: Query encumbrances in Banner by FOAPAL element

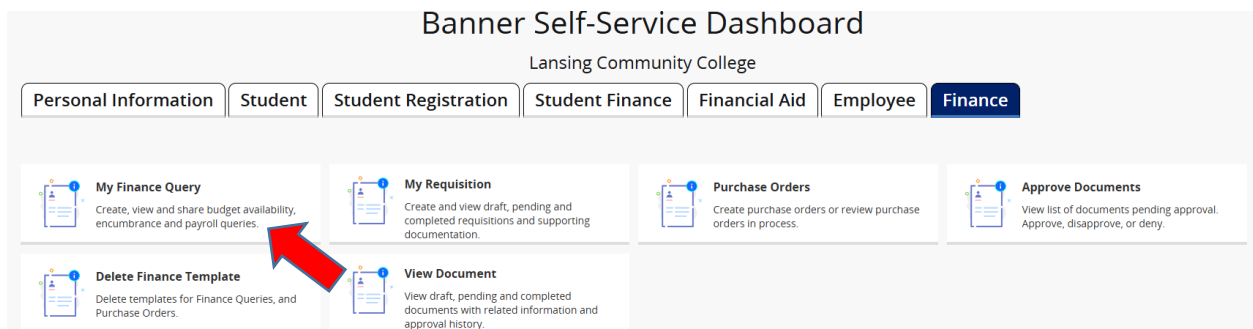
1. Log into MyLCC and click on the Banner link in the upper right-hand menu



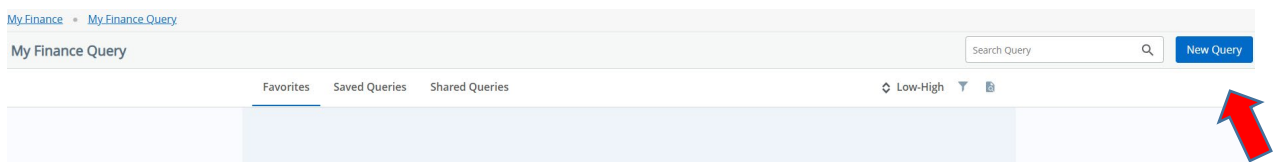
2. Click on the Finance Tab in the Banner Self-Service



3. Click on My Finance Query



4. Click on New Query Button

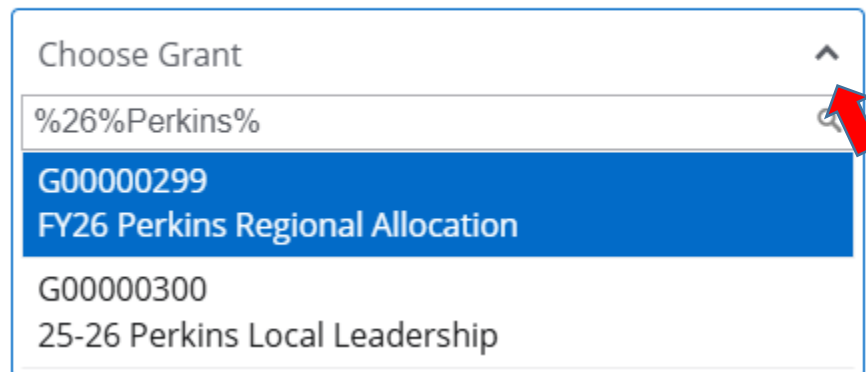


5. A pop-up box will appear. Navigate to each section by using the Tab button on the keyboard or scroll with a mouse.

Required Fields: (Select from drop-down list)

- **Select Query Type**
 - Encumbrance Query
- **Chart**
 - L (L for LCC)
- **Organization or Grant**
 - The wildcard symbol, %, can be used to pull up multiple organizations, accounts, funds, etc.
 - Organization or Grant is required.
 1. Query for Grant
 - a. Lookup up grant number using drop down list. Use wild card symbol for search. For example, to search for 26 Perkins, use %26%Perkins%. Click on the desired grant.

Grant * ⓘ



The image shows a dropdown menu for the 'Grant' field. The search input contains '%26%Perkins%'. The dropdown list is open, showing the following options:

- Choose Grant
- %26%Perkins%
- G00000299**
FY26 Perkins Regional Allocation
- G00000300
- 25-26 Perkins Local Leadership

A red arrow points to the search icon in the dropdown menu.

- a.
 - b. Perkins Note: Fill in the Activity code provided for the project to narrow the data returned to the specific project.
- **Encumbrance Status**
 - Choose Open to show encumbrances that have a remaining balance. Choose Closed to see those that have a zero balance. Choose All to see both.
 - **Fiscal Year and Fiscal Period**
 - Fiscal Period defines the number of Fiscal months to be included in the query. For example, 1 for July or 6 for December. Use 14 to include everything.

Create New Query

Select Query Type

Encumbrance Query



Values

Chart *

L Lansing Community College



Index

Choose Index

Fund

Choose Fund

Organization * ①

202%



Grant * ①

Choose Grant



Account

Choose Account

Program

Choose Program

Activity

Choose Activity

Location

Choose Location

Fund Type

Choose Fund Type

Account Type

Choose Account Type

Commitment Type

All

Encumbrance Status

Open



Fiscal Year *

2026

Fiscal Period *

14



SUBMIT

- Move mouse over the word submit and right click once the bar turns blue.



6. The query results show expenditure summary by account.

Form Fields	Description
Account	Account code
Document Code	Purchase Order number
Description	Vendor Name
Original Commitments	Amount of original purchase order
Encumbrance Adjustments	Amount of changes to purchase order
Encumbrance Liquidations	Total amount relieved from the encumbrance either through paid invoices or adjustment made the Purchasing Department
Year to Date	Total paid on the purchase order
Current Commitments	Amount remaining on the purchase order
% Used	Percentage that is paid on the purchase order

Query Results

Account	Account Title	Document Code	Description	Original Commitments	Encumbrance Adjustments	Encumbrance Liquidations	Year to Date	Current Commitments	% Used
7173	Software and Site Licenses	P2603262	Sonocent LLC	\$5,528.40	\$0.00	(\$5,528.40)	\$5,528.40	\$0.00	100.00
Report Total (of all records)				\$5,528.40	\$0.00	(\$5,528.40)	\$5,528.40	\$0.00	100

7. Click on purchase order number in “blue” font in the Document Code column to drill-down to see details.

Query Results

Account	Account Title	Document Code	Description	Original Commitments	Encumbrance Adjustments	Encumbrance Liquidations	Year to Date	Current Commitments	% Used
7173	Software and Site Licenses	P2603262	Sonocent LLC	\$5,528.40	\$0.00	(\$5,528.40)	\$5,528.40	\$0.00	100.00
Report Total (of all records)				\$5,528.40	\$0.00	(\$5,528.40)	\$5,528.40	\$0.00	100

