**Quick Reference Card – PBC Future Years and Non-PBC Employees**

**ZFI_MULTI_YR_ENCUMB**

**Process:** To Save A View for reports in BW

**PROCEDURES**

Go to ZFI_MULTI_YR_ENCUMB in the SAP Production system:

**View Current Encumbrances:**

The user can search by Employee’s Pernr Number, Position Number, Date, or Cost Object.

The “Search All” button was used with no search criteria entered to get the data below. The user will need to highlight a particular encumbrance to view/edit/delete.

- View the current encumbrance.
- View with the possibility to edit the current encumbrance.
- Delete the current encumbrance.
Quick Reference Card – PBC Future Years and Non-PBC Employees

**ZFI_MULTI_YR_ENCUMB**

**Viewing a current encumbrance:**
Highlight encumbrance and select 📋.
**Quick Reference Card – PBC Future Years and Non-PBC Employees**

**ZFI_MULTI_YR_ENCUMB**

**Entering an encumbrance: PBC encumbrance**

PBC employees are current full time employees that already have a budget established for them in the current fiscal year. Only future year encumbrances can be established for PBC employees.

The user will need to enter a Pernr number or position number to begin. The PA20 labor distribution (0027 or 1018 screen) can be used with the encumbrance. If no PA20 is used, the user would need to enter the specific cost objects on the encumbrance. Click new to begin.

You will be prompted to add a description to detail the encumbrance and add additional comments. Since this is for future years, you can project a % increase for each fiscal year.
In the displayed example, the end date of the future year encumbrance is 6/30/2019 with a 2% increase for each fiscal year.

**Entering an Encumbrance: Non-PBC.** Non-PBC employees are temporary employees, students, etc. that do not have a defined budget in the current fiscal year. Current and future year encumbrances can be established for Non-PBC employees.

The user will need to enter a Pernr number or position number to begin. The PA20 labor distribution (0027 or 1018 screen) can be used with the encumbrance. If no PA20 is used, the user would need to enter the specific cost objects on the encumbrance. Click new to begin.
This example sets up an encumbrance for a post doc scholar for 6 months of a project.

The bottom section of the screen can be used to see the current encumbrances based on the payroll records and the future payroll amounts. If you were to make a change to the encumbrance, you can hit the refresh button to recalculate the encumbrance for future years.

**Entering an Encumbrance: Other.** Encumbrances can also be established for OTHER items (Equipment, Supplies, etc.) The Other encumbrances would need to be manually adjusted when expenses post since there is not an automatic trigger like payroll.
**Quick Reference Card – PBC Future Years and Non-PBC Employees**

**ZFI_MULTI_YR_ENCUMB**

The example on this encumbrance would be $100/month for office supplies for FY2018. Each month, the user would have to update the amount and click the green flag to release the encumbrance to the updated amount.

<table>
<thead>
<tr>
<th>Enc. Type</th>
<th>Enc. ID</th>
<th>Created By</th>
<th>Created On</th>
<th>Edited By</th>
<th>Edited On</th>
<th>Annual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,200.00</td>
</tr>
</tbody>
</table>

**Helpful Hints:**

1. When entering a PBC or Non-PBC, the user will either need to enter a PERNR number or a position number. The PERNR has a person assigned while the position does not have a person assigned.
2. Only the salary line needs to be entered to the encumbrance. The user will have the option to include the benefits as part of the encumbrance. For future year encumbrances, the user can also budget future year raise projections.
3. Once an encumbrance is established for a person, a new one is not allowed to be created for that person. The original encumbrance would need to be edited or deleted. If edited, the user can use the refresh button to refresh the calculation.
4. Future year encumbrances are only allowed on grants (WBS Elements). Cost centers are only allowed on current year only.
5. An error message will be given to the user if they try to enter a person as a Non-PBC encumbrance when they have a PBC established.
6. After payroll processes, all PBC and Non-PBC encumbrances will be recalculated. The other encumbrance would need to be manually adjusted since there is no automatic trigger to reduce.
<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>