



Step	Action
<b>Navigation:</b> Query Manager Tile on OU Home Screen >> OU_BUD_REQ_PO or OU_BUD_REQ_PO_SP	
<p>1</p>	<p>Do you have an outstanding Pre-Encumbrance or Encumbrance that is tying up budget? The OU_BUD_REQ_PO query shows the outstanding requisitions and/or purchase orders that are encumbering funds for non-SPNSR chartfield spreads.</p> <p>The OU_BUD_REQ_PO_SP query shows the outstanding requisitions and/or purchase orders that are encumbering funds for SPNSR chartfield spreads.</p> <p>A pre-encumbrance is the amount that you intend to spend when you create a requisition.</p> <p>An encumbrance is the amount that you can legally spend based on a contract or purchase order.</p>
<p>2</p>	<p>To run the OU_BUD_REQ_PO query, click on the <b>Query Manager</b> tile on the <b>Home Screen</b> and select <b>Query Viewer</b> or on the left side menu or use the <b>NavBar</b> and select <b>Navigator &gt; Reporting Tools &gt; Query &gt; Query Viewer</b>.</p>
<p>3</p>	<p>Note: A Budget Period entry is required for all funds except SPNSR. All fields must be filled in except for From Source and From Project (only if you are not searching for those particular fields). Users will only be able to see requisitions and/or purchase orders for departments that they have access to.</p> <p>Below is an example on how to run this query. In this example, we want to see open requisitions and/or purchase orders for the Budget Period of FY2021 and for the department range of ADH01001 – ADH09001.</p> <div data-bbox="516 1167 1214 1808" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><b>OU_BUD_REQ_PO - Req and PO to Budget Info</b></p> <hr/> <p>Budget Period <input type="text" value="FY2021"/></p> <p>From Org <input type="text" value="ADH01001"/></p> <p>To Org <input type="text" value="ADH09001"/></p> <p>From Fund <input type="text" value="0"/></p> <p>To Fund <input type="text" value="Z"/></p> <p>From Function <input type="text" value="0"/></p> <p>To Function <input type="text" value="Z"/></p> <p>From Source <input type="text"/></p> <p>To Source <input type="text" value="Z"/></p> <p>From Project <input type="text"/></p> <p>To Project <input type="text" value="Z"/></p> <p style="text-align: center;"><input type="button" value="View Results"/></p> </div>



Row	Req	PO	Budget Period	Org	Fund	Entity	Function	Source	Project	Amt
1		0001674	FY2021	ADH01001	EDGEN	00000	00016			1,000
2	0001192		FY2021	ADH03075	SUAUX	00000	00061	SU387000		1410,000
3		0000867	FY2021	ADH03070	MISCA	00000	00016			14214,580
4	J_		FY2021	ADH03070	MISCA	00000	00016			-22500,000
5		0000766	FY2021	ADH03001	EDGEN	00000	00016			3115,510
6	J_		FY2021	ADH03001	SUAUX	00000	00061	SU385000		-175,000
7	0001708		FY2021	ADH03001	MISCA	00000	00016			19400,000
8	0005226		FY2021	ADH03001	MISCA	00000	00016			1000,000
9		0004518	FY2021	ADH03001	EDGEN	00000	00016			3000,000
10	J_		FY2021	ADH03075	SUAUX	00000	00061	SU387000		-1410,000
11	0005242		FY2021	ADH03001	EDGEN	00000	00016			1500,000
12		0004696	FY2021	ADH01001	EDGEN	00000	00016			2445,750
13	0001185		FY2021	ADH03070	MISCA	00000	00016			22500,000
14	0002128		FY2021	ADH03001	EDGEN	00000	00016			3825,000
15	J_		FY2021	ADH01005	EDGEN	00000	00017			-1592,460
16		0001383	FY2021	ADH01001	EDGEN	00000	00016			1,000
17		0001387	FY2021	ADH01001	EDGEN	00000	00016			1,000
18	0001464		FY2021	ADH03001	EDGEN	00000	00016			450,000
19	0001766		FY2021	ADH01001	EDGEN	00000	00016			1,000
20	J_		FY2021	ADH03001	EDGEN	00000	00016			-13559,800
21	0004247		FY2021	ADH01001	EDGEN	00000	00016			650,000
22		0004328	FY2021	ADH03001	MISCA	00000	00016			342,100
23	J_		FY2021	ADH01001	EDGEN	00000	00016			-41348,750
24	0000838		FY2021	ADH01001	EDGEN	00000	00016			38250,000
25	0001134		FY2021	ADH03001	EDGEN	00000	00016			1270,000
26	0001763		FY2021	ADH01001	EDGEN	00000	00016			1,000
27	0002128		FY2021	ADH03001	SUAUX	00000	00061	SU385000		175,000
28		0000369	FY2021	ADH03001	EDGEN	00000	00016			227,520
29	0004131		FY2021	ADH03001	EDGEN	00000	00016			900,000
30	0004925		FY2021	ADH01001	EDGEN	00000	00016			2445,750
31		0004103	FY2021	ADH03001	MISCA	00000	00016			19400,000
32	J_		FY2021	ADH03001	MISCA	00000	00016			-20400,000
33	0001158		FY2021	ADH03001	EDGEN	00000	00016			4114,800
34	0001768		FY2021	ADH01001	EDGEN	00000	00016			1,000
35		0000766	FY2021	ADH03001	SUAUX	00000	00061	SU385000		175,000
36	0004979		FY2021	ADH01005	EDGEN	00000	00017			1592,460
37	0005284		FY2021	ADH03001	EDGEN	00000	00016			3000,000

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The results above shows all open requisitions and purchase orders. Notice that in the Req column, there is a J\_.

If you have a Req or PO that could not restore budget due to being in a completed or cancelled status then you can expect to see entries that begin with a J\_. When you see an entry like this, you can match it to the totaled amount in the Amt column by chartfield spread.

For example, these two entries cancel each other out by Amt and Chartfield Spread. Therefore, requisition 0000001185 is not pre-encumbering any funds and all budget has been restored for this requisition.

Req	PO	Budget Period	Org	Fund	Entity	Function	Source	Project	Amt
J_		FY2021	ADH03070	MISCA	00000	00016			-22500,000
0001185		FY2021	ADH03070	MISCA	00000	00016			22500,000

Also, in some instances where the PO reference cannot be determined you will see an entry that begins with a V\_. In these cases, you can try to identify the PO associated with this voucher by dollar amount or you can look this voucher up within PeopleSoft to find the PO it should be matched with.

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To run the OU\_BUD\_REQ\_PO\_SP query, click on the **Query Manager** tile on the **Home Screen** and select **Query Viewer** or on the left side menu or use the **NavBar** and select **Navigator > Reporting Tools > Query > Query Viewer**.

This query gives you the same results as the OU\_BUD\_REQ\_PO query, but it only prompts the user for Business Unit and Project.



**OU\_BUD\_REQ\_PO\_SP - Req and PO to Budget Info**

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Business Unit

Project

If you have any questions regarding outstanding purchase orders or requisitions, please contact [askpurchasing@ouhsc.edu](mailto:askpurchasing@ouhsc.edu) or the Contract Specialist associated with your requisition or purchase order.