Quick Guide

How to Check Open Encumbrances

Use either one of the methods below to check your open encumbrances and analyze whether they should remain open during the new fiscal year. Both methods produce the same results.

Open Encumbrance Inquiry - Summary

Navigation: Main Menu → Procurement Custom → Purchasing Custom → UTD Open Encum Inquiry – Summ

You must put in either a range of cost centers, or the same cost center twice to produce search results.

Open Encumbrance Query

If you have access to viewing queries in PeopleSoft, you can produce the following query to view open encumbrances.

Navigation: Main Menu → Reporting Tools → Query → Query Viewer → Search by Query Name

Type in UTD_OPEN and click “Search”. Choose UTD_OPEN_ENCUM_SUMM from the Query list and click “HTML”. On the page that opens, type in your cost center (must be in both boxes) or cost center range and view your results. This query can also be exported to Excel from the main query page.

Questions?

If you need to close any open encumbrances, contact Purchasing at purchasing@utdallas.edu or x2307. The last day to close an open PO for FY2013 Year-End is Friday, August 16, 2013.

Purchasing will roll all remaining encumbrances to FY 2014.