Budget Check Requisition (Manual)

Once a Requisition is approved, then it will be included in a Budget Check that is run in a batch process periodically throughout the day. Budget Check may be conducted manually for requisitions with a status of Approved or Canceled. Budget Check creates the pre-encumbrance for approved Requisitions. Budget Check releases the pre-encumbrance for canceled requisitions.

Step	Action
1.	Enter ***https://home.cunyfirst.cuny.edu*** in your browser's address bar: • Enter your Username and Password and click the **Log In** button. • From the **Enterprise Menu**, select the **Financials Supply Chain** link.
2.	Navigate to: ___eProcurement > Manage Requisitions___.
3.	On the **Manage Requisitions** page in the **Search Requisitions** section, enter or 🔍 look up the **Business Unit.** ***Note: By default, the Business Unit based on the User's profile displays.***
4.	Enter any additional known search criteria.
5.	Click the **Search** button.
6.	The search results display on the page in the **Requisition**s section. On the row with the Requisition ID to be budget checked from the **Select Action** ▾ dropdown menu, select the **Check Budget** list item and then select the **Go** button.
7.	The **Manage Requisitions** page displays. In the **Budget** column one of these two statuses display: **Valid** – This status displays when there is sufficient budget in the entered Chartfields account. The designated amount is pre-encumbered as a result of the Budget Check. **Error** – If the Error status displays, then validate the Chartfields. As needed, correct the Chartfields information. ***Note: To view and edit the Chartfields, navigate to the 3. Review and Submit link. In the Requisition Lines section, select the ▷ expand icon of each line to review Chartfield details As needed to edit these fields of the Requisition, click the Modify Line/Shipping/Accounting button. In the Accounting Defaults section, on the Chartfields 1 and Chartfields 2 tabs, edit the values.*** ***Note: Any change to the Chartfields will reinitiate the Approval workflow for this requisition.***
8.	As needed, on the row with the Requisition ID to be budget checked again from the **Select Action** ▾ dropdown menu, select the **Check Budget** list item and then select the **Go** button.
9.	If the **Error** status displays again, then select the **Errors** link to get more information about the specific budget error and then contact the college Budget Office.
	End of Procedure.