

How to Edit a Requisition that has Received a Budget Error?

BUSINESS OBJECTIVE: If funds are not available in the chartfield string, requisitions will fail the budget check process (see Budget Overview Query section). Requesters **must** contact the Budget Office to correct the error. Requisitions in budget error **DO NOT** route to the Purchasing Department.

STEP#1: Navigate to eProcurement>Manage Requisitions and **search** for the requisition that is in **Approved** Status and Budget **Error**.

Here is an example

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:	<input type="text" value="COSPR"/>	Requisition Name:	<input type="text"/>
Requisition ID:	<input type="text" value="0000005381"/>	Request Status:	<input type="text"/>
Date From:	<input type="text"/>	Date To:	<input type="text"/>
Requester:	<input type="text"/>	Entered By:	<input type="text"/>
		PO ID:	<input type="text"/>

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▷ 0000005381	United Parcel Service	COSPR	06/15/2016	Approved	Error	10,000.00USD	<Select Action...> <input type="button" value="Go"/>

STEP#2: 'Select Action' dropdown to the right of 'Total', select 'Edit Requisition' and click on **GO** to investigate the details of the error

Requisitions

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Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▷ 0000005381	United Parcel Service	COSPR	06/15/2016	Approved	Error	10,000.00USD	<div style="border: 1px dashed red; padding: 5px; display: inline-block;"> <Select Action...> <input type="button" value="Go"/> <ul style="list-style-type: none"> <Select Action...> Cancel Requisition Check Budget Copy Requisition <li style="background-color: #4F81BD; color: white;">Edit Requisition View Approvals </div>

[Create New Requisition](#)
 [Inquire Change Request](#)
 [Inquire Receipts](#)
 [Requisition R](#)

STEP#3: Read the message carefully. Click **Ok**

Message

This requisition is approved. Editing this requisition will restart the approval process. (18036,6249)

Upon editing the requisition, clicking the Save and Submit or Save and Preview button will restart the approval process from the beginning. Click OK to continue, or click Cancel to go back.



STEP#4: System indicates that current requisition has failed budget check, click **OK**. Click on the **Error** hyperlink

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Mail Delivery Service		1.0000	Each	10,000.00000	10,000.00

Total Amount: 10,000.00 USD

Message

Current document has failed budget check. (10222.23)

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Budget Checking Status: **Error**

STEP#5: There are a few reasons why a requisition will fail the budget check process, this one reads 'No Budget Exists'

Requisition Exceptions | **Line Exceptions**

Business Unit: COSPR Requisition ID: 0000005381

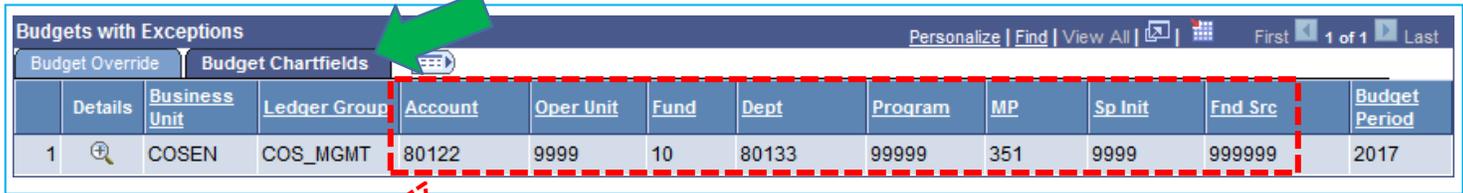
*Exception Type: Override Transaction More Budgets Exist [Advanced Budget Criteria](#)

Maximum Rows:

Budgets with Exceptions Personalize | Find | View All | First 1 of 1 Last

Budget Override	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
	1	COSEN	COS_MGMT	No Budget Exists	More Detail	<input type="checkbox"/>	Go To ...

STEP#6: Click on the 'Budget Chartfields' tab to review all chartfields include Budgetary Account.



Budgets with Exceptions												
Budget Override		Budget Chartfields										
	Details	Business Unit	Ledger Group	Account	Oper Unit	Fund	Dept	Program	MP	Sp Init	Fnd Src	Budget Period
1		COSEN	COS_MGMT	80122	9999	10	80133	99999	351	9999	999999	2017

This is your budgetary Account

Verify budgetary account number and associated chartfields are the same as the one obtained when you ran the Budget Overview Query. If it is not, edit your requisition and select the appropriate category code (see section 2-creation requisitions, 2-add items and services, step#2. If it is, see below.

STEP#7: Forward screenshots of step#5 and step#6 to your Budget Office to resolve the issue.

STEP#8: In this example, the budget office indicated that there was insufficient funds in the account number. The budget office increased the funding in the account and requisition will automatically pass budget check at the next budget checking cycle (top of the hour)

In some cases, requisitions will fail budget check due to the incorrect chartfield combination. The Budget Office will provide guidance regarding the chartfield string to be used. After correcting the chartfield string, requesters must **Save & Submit** the requisition for approval again.

NOTE: Requisitions with budget errors will not route to the Purchasing department.