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PO.030.030 – BUDGET CHECKING PURCHASE ORDERS

Purpose	• To budget check purchase orders. • To understand the two methods for budget checking purchase orders.
Description	Purchase orders can be budget checked from a variety of pages including: • From the Add/Update Purchase Orders page • From the Budget Check Purchase Orders page (batch process) Budget checking using the batch process is useful when users need to budget check multiple purchase orders at one time and specify criteria for which requisitions to budget check – such as Business Unit and Date.
Security Role	**BOR_PO_MAINTAIN** (Add/Update Purchase Order page) **BOR_PO_PROCESS** (Budget Check Purchase Orders page)
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to budget check purchase orders from the Add/Update Purchase Orders page.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Purchase Orders** link.
5.	Click the **Add/Update POs** link.

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Step	Action
6.	Click the **Find an Existing Value** tab.
7.	Verify the business unit defaults in the **Business Unit** field.
8.	Enter or search for the purchase order in the **PO ID** field. The system navigates to the Add/Update Purchase Orders page.
9.	Verify the purchase order is in an Approved status.
10.	Click the **Budget Check** icon. The budget checking process runs and the status updates to one of the following: • **Valid:** means the transaction passed budget checking with no errors or warnings and the control budget is updated. • **Error:** means the transaction failed budget checking and the control budget did not update. The Error status on the Add/Update PO page is also a link to the exceptions page to review the exceptions and determine how to resolve the error/exception. For more information, see KK.050.005 – Reviewing Budget Check Exceptions – Purchase Orders and Requisitions.

Below are step by step instructions on how to budget check purchase orders from the Budget Check Purchase Orders page.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Purchase Orders** link.
5.	Click the **Budget Check Purchase Orders** link.
6.	Select the **Add a New Value** tab. *Note*: *If a Run Control ID has been previously created, use Find an Existing Value.*

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Step	Action
7.	Enter the Run Control ID and select the **Add** button. A Run Control ID is an identifier that, when paired with a User ID, uniquely identifies the process running. The Run Control ID defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values. *Note: If the same Run Control ID is used for requisitions that is used for purchase orders, the budget processor will process all eligible purchase orders and requisitions.*
8.	Select the **Always Process** option in the Process Frequency section.
9.	Enter a description in the **Description** field. *(Ex: Purchase Order Budget Checking)*
10.	Enter the business unit in the **Business Unit** field.
11.	For the **PO ID** options, choose one of the following: • **All**: will run all POs through the budget checking process • **Range**: will allow users to select a range of purchase orders based on PO ID to run through the budget checking process • **Value**: will allow users to run budget checking for one purchase order.
12.	Specify any additional criteria from the remaining fields as needed.
13.	Click the **Save** button.
14.	Click the **Run** button. The Process Scheduler Request window displays.
15.	Click the **OK** button.
16.	Verify the system generates a Process Instance under the Run button. *Note: The Process Instance number helps to identify the process that was run when you check the status.*
17.	Click the **Process Monitor** link. The system navigates to the Process Monitor page.
18.	Click the **Refresh** button until the Run Status updates.
19.	If the Run Status displays as Success and the Distribution Status is Posted, then all the purchase orders were successfully budget checked. *Note: if this process runs to Warning, this means the process itself ran to Success, but a budget error exists on the transaction(s). No Success means the Budget Checking process itself failed.*