PO.020.930 – BUDGET CHECKING REQUISITIONS

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

Procedure

Below are step by step instructions on how to budget check requisitions from the Add/Update Requisitions page.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Requisitions** link.
5.	Click the **Add/Update Requisitions** link.
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 requisition in the **Requisition ID** field. The system navigates to the Add/Update Requisitions page.
9.	Verify the requisition 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 Requisition 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 requisitions from the Budget Check Requisitions page.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Requisitions** link.

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Step	Action
5.	Click the **Budget Check Requisition** link.
6.	Select the **Add a New Value** tab. *Note: If a Run Control ID has been previously created, use Find an Existing Value.*
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: Requisition Budget Checking)*
10.	Enter the business unit in the **Business Unit** field.
11.	For the **Req ID** options, choose one of the following: • **All**: will run all requisitions through the budget checking process • **Range**: will allow users to select a range of requisitions based on Req ID to run through the budget checking process • **Value**: will allow users to run budget checking for one requisition.
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.

Step	Action
19.	Once the Run Status displays as Success and the Distribution Status is Posted, then all the requisitions 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.*