# EP.020.570 – BUDGET CHECKING REQUISITIONS

| | |
|---|---|
| **Purpose** | To budget check requisitions in batch. |
| **Description** | This topic demonstrates how to budget check requisitions in batch by running the Commitment Control Budget Processor. Budget checking is the processing of source transactions against control budget ledgers to see if they pass, fail, or pass with a warning.<br><br>To budget check requisitions in batch, users need to access the Requisition Budget Check page to initiate the Commitment Control Budget Processor. When Budget Checking requisitions in batch, you can run the process on all requisitions or just on certain ones selected by requisition ID, date, requester, origin, or status.<br><br>*This topic does not discuss pre-budget checking requisitions. For more information regarding pre-budget check, see EP.020.500 - Creating a Special Request Requisition.* |
| **Security Role** | **BOR_EP_PROCESSES** |
| **Dependencies/ Constraints** | The requisition must have an Accounting Date that is within the current open period to be picked up in the budget check process. |
| **Additional Information** | Users can also budget check requisitions individually by selecting the Budget Check option from the dropdown menu on the Manage Requisitions page. For more information, see EP.020.540 – Managing Requisitions. |

## Procedure

| Step | Action |
|---|---|
| 1. | Click the **NavBar** icon. |
| 2. | Click the **Menu** icon. |
| 3. | Click the **Purchasing** link. |
| 4. | Click the **Create Requisitions** link. |
| 5. | Click the **Budget Check** link. |
| 6. | Select the **Add a New Value** tab.<br><br>***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.<br><br>***Note****: 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.* |
| 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:<br><br>• **All:** Select to budget check all requisitions.<br>• **Range:** Select to display the **From** and **To** fields. This option will budget check all requisitions that match the date range specified.<br>• **Value:** Select to display the **Req ID** field. This option will budget check the requisition that matches the ID specified in the **Req ID** field. |
| 12. | For the **Req Date** options, choose one of the following:<br><br>• **All:** Select to budget check all requisitions.<br>• **Range:** Select to display the **From** and **To** fields. This option will budget check all requisitions that match the date range specified.<br>• **Value:** Select to display the **Req Date** field. This option will budget check the requisition that matches the date specified in the **Req Date** field. |

| Step | Action |
|---|---|
| 13. | For the **Actg Date** options, choose one of the following:<br>• **All:** Select to budget check all requisitions.<br>• **Range:** Select to display the From and To fields. This option will budget check all requisitions that match the date range specified.<br>• **Value**: Select to display the Accounting Date field. This option will budget check the requisition that matches the date specified in the Accounting Date field. |
| 14. | In the **Requester ID** field, select to budget check either All Requester ID's or a Specific Requester ID. If Specific Requester is chosen, enter the requester ID in the Requester field. |
| 15. | Select either All Origins or Specific Origin in the **Origin** field. If Specific Origin is chosen, enter the Origin in the appropriate field. |
| 16. | For the **REQ Status** field, choose either All or Some Values. If Some Values is chosen, select from the values provided (Initial, Open, Approved, Denied, Pending, Complete, or Cancel). |
| 17. | Click the **Save** button. |
| 18. | Click the **Run** button. |
| 19. | The Process Scheduler Request window displays. Verify the **Select** checkbox is checked next to the PV_FS_BP process name. |
| 20. | Click **OK.** |
| 21. | Verify the **Process Instance** number appears under the Run button. This number helps identify the process when a user checks the status. |
| 22. | Click the **Process Monitor** link. |
| 23. | If needed, click the **Refresh** button until the Run Status of the process displays as Success and the Distribution Status says Posted. |