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PO.050.020 - Overriding Budget Checking Error on PO

Trigger:

Concept

This topic demonstrates how to override a budget checking error on a PO. Inevitably, some transactions do not pass budget checking and cause the system to produce Exceptions. Some of the circumstances that generate budget checking failures include:

- Insufficient funds for a particular transaction
- Inconsistent Chartfield combinations
- Budget Date for the transaction is out of bounds

Depending on the configuration of your institution's Control budgets, the exact reason a budget has insufficient funds varies from budget to budget. The budget may be on hold, closed, or simply out of funds. Additionally, you may have set up some budgets to approve transactions even if they go over budget amounts. Because of this, exceptions fall into two categories – warnings and errors.

Error Correction:

You can correct errors for transactions by taking one or more of the following actions:

- Change the amount on the transaction lines to conform to budget limits.
- Change the budget amounts to enable more transactions to pass budget check.
- Override the budget for a particular transaction.
- Override the entire transaction for all affected budgets. (Only a user with the proper authority can perform this type of correction.)

This scenario demonstrates the third option – Override the budget for a particular transaction.

Topic Objectives:

Upon completion of this topic, you will be able to:

Business Process Document

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- Identify reasons a Purchase Order might fail budget checking
- Identify the possible actions for correction transaction errors
- Override a Budget Checking Error for a Purchase Order

Assumptions

Dependencies/Constraints

Additional Information

Procedure

In this topic, you will override a Budget Checking error on a Purchase Order created for an asset.

Step
1.
2.
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11.
12.

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Checking Error on PO
