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## EP.060.080 - Reviewing Req Budget Checking Errors

#### Trigger:

#### Concept

This topic demonstrates how to review budget check errors for a requisition. PeopleSoft eProcurement interfaces with PeopleSoft General Ledger for budget checking and commitment control.

When reviewing a requisition’s budget check errors, you may be able to override the budget if you have the authority to do so and the circumstances are appropriate to override the budget error.

**Topic Objectives:**

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

- Identify what is displayed on the Commitment Control Budget Details page.

- Identify when a user is able to override a budget.

- Define the difference between an exception type of warning and an exception type of error.

- Review a requisition’s budget check errors.

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

For this topic, imagine that you have just clicked the Check Budget button for requisition 0000021290. You need to review and override the budget check errors. Let’s see how this is done.

| Step | Action |
| --- | --- |
|  | Click the **Error** link. |
|  | Click the **Maximize/ Restore** button. |
|  | Click the **vertical** scrollbar. |
|  | Click the **Budget Chartfields**tab to review the chartfields that are in error. |
|  | Click the **Budget Override**object. |
|  | Click the **View Related Link** button. |
|  | Click the **Go to Budget Inquiry** link. |
|  | The **Commitment Control Budget Details** page will display the Budgeted, Expensed, Encumbered, Pre-Encumbered, and available budget for the chartfield combination used on the requisition. |
|  | You can navigate directly to a budget checking error for a requisition by accessing the **Review Budget Check Exceptions** component directly. |
|  | Click the **Requisition** link. |
|  | Enter the requisition ID into the **Search** field. Enter "**0000021290**". |
|  | Click the **Search** button. |
|  | Click the **Override Budget** checkbox if you have the authority and the circumstances are appropriate to override the budget error.  This checkbox will be grayed if you do not have the authority to override a budget checking error, or the error cannot be overridden. |
|  | Click the **Override Budget**checkbox for the second line. |
|  | Click the **Budget Check**button to run the budget checking process. |
|  | Click the **OK** button. |
|  | Click the **OK** button. |
|  | If the Requisition passes budget checking, the exception type on this page will change to **Warning**, or no rows exist if the budget checking does not log any errors.  A Warning will not prevent a budget check status of **Valid**; however, an exception type of **Error** will require additional correction(s) be made on the transaction. |
|  | Congratulations. You have just completed the **Reviewing Requisition Budget Check Errors** topic. Below is a summary of the key concepts of this topic:  - The Commitment Control Budget Details page displays the Budgeted, Expensed, Encumbered, Pre-Encumbered, and Available Budget for the chartfield combination used on a requisition.  - A user can override a budget if they have the authority to do so, and the circumstances are appropriate to override the budget error. If these two criteria are not met, the system will not allow the budget to be overridden.  - A Budget check warning does not prevent a budget check status of Valid, however an exception type of Error requires additional corrections to be made on the transaction.  **End of Procedure.** |