

How to Identify Budget Check Errors in CUNYfirst Procurement

1. Click Financials Supply Chain
2. Click eProcurement
3. Click Manage Requisitions
4. Search for your requisitions
5. Identify requisitions that have **Budget Check-Error**
6. **Click the Req ID link** to access Requisitions Details

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: HTRPR Requisition Name: []
Requisition ID: [] Request Status: All but Complete Budget Status: []
Date From: 07/11/2013 Date To: 07/18/2013
Requester: [] Entered By: [] PO ID: []

Search Clear

Requisitions

Req ID	Requisition Name	BU	Date	Status	Budget	Total
0000000015	0000000015	HTRPR	07/16/2013	Approved	Error	1,022.24USD

7. Click Edit Requisition

Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
0000000015	0000000015	HTRPR	07/16/2013	Approved	1,022.24

Line	Item Description	Source	Status	Amount Only	Qty	Price	Status	Total
1	SECURITY NETWORK SURVEY	Available	N	8.0000	Each	127.78000 USD	Approved	1,022.24

Line Comments:
<< DEPARTMENT OF PUBLIC SAFETY ATTEN : LISA JACOX WB122 212-772-4521 NO SHIPPING REQUIRED >>

Show Distribution Information

Line Number	Schedule Number	Distrib Line	Exception Description
1		1	Error in Budget Check

Edit Requisition

[Return to Manage Requisitions](#) [Requisition Schedule and Distribution](#)

8. An error message should appear warning of a failed budget check. Click OK

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: HTRPR Hunter College - CUNY
Requester: 10842400 Lisa Jacox *Currency: USD
Requisition Name: 0000000015 Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price
1	SECURITY NETWORK SURVEY				

Message

Current document has failed budget check. (10222.23)

OK

9. Click the **Error** link

Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: HTRPR Hunter College - CUNY
 Requester: 10842400 Lisa Jacob *Currency: USD
 Requisition Name: 000000015 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	SECURITY NETWORK SURVEY	SCHNEIDER ELECTRIC BUILDINGS AMERICAS	8.0000	Each	127.78000	1,022.24
Total Amount:						1,022.24 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget Budget Checking Status **Error**

Save & submit Save & preview approvals Cancel changes Find more items

10. A new window will pop-up and detail the error under the Exception heading

Exception

Description

No Budget Exists

There is not a budget allocation for budget account 80XXX's chartfields

Exceeds Budget Tolerance

There is not enough available budget amount in budget account 80XXX's chartfields

Requisition Exceptions

Business Unit: HTRPR Requisition ID: 0000000589

*Exception Type: Error Override Transaction
 Maximum Rows: 100 More Budgets Exist Advanced Budget Criteria

Budgets with Exceptions

Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1	HTR01	HTR_MGMT	No Budget Exists	More Detail		Go To

Save Return to Search Previous in List Next in List Notify

11. Click Budget ChartFields

12. Budget Account ID

Requisition Exceptions

Business Unit: HTRPR Requisition ID: 0000000589

*Exception Type: Error Override Transaction
 Maximum Rows: 100 More Budgets Exist Advanced Budget Criteria

Budgets with Exceptions

Details	Business Unit	Ledger Group	Account	Oper Unit	Fund	Dept	Program	MP	Sp Init	Fnd Src	Budget Period
1	HTR01	HTR_MGMT	80122	8000	10	80181	99999	350	9999	999999	2014

Save Return to Search Notify