# PeopleSoft Training Budget\_Check\_a\_Requisition\_9\_2

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## Budget\_Check\_a\_Requisition\_9\_2

## **Budget Check Contract and Non-Contract Requisitions**

Budget Check a Requisition

#### Procedure

In this topic you will learn how to **Budget Check a Requisition**.

NOTE: The requisition must be at a status of approved before it can be budget checked.

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Step	Action
1.	Click the <b>Main Menu</b> button. Main Menu
2.	Click the <b>Purchasing</b> menu. Purchasing
3.	Click the <b>Requisitions</b> menu. Requisitions
4.	Click the Add/Update Requisitions menu. Add/Update Requisitions

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Step	Action
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Requester Name: begins with V				
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Find an Existing Value Keyword Search Add a	New Value			
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Step	Action
6.	Enter the desired information into the <b>Requisition ID</b> field. Enter "0062988".
7.	Click the Search button.

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Step	Action
8.	Click the <b>Budget Check</b> button.
	<i>NOTE: The system will automatically send you to the Process Monitor panel.</i>

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Step	Action
9.	Click the Refresh button until the Run Status = Success and the Distribution Status = Posted.
	NOTE: <u>DO NOT</u> repeatedly click the Refresh button as this uses system resources. Please allow 15 seconds between clicks. Refresh
10.	Run Statuses
	It is possible that the Run Status will not display as Success when budget checking a requisition. Other statuses are Warning, No Success and Error.
	A Run Status of <b>Success</b> indicates that the document budget checked successfully.
11.	Run Statuses (continued)
	A Run Status of <b>Warning</b> indicates that either no documents were selected to process, or the process was successful and produced a budget check error.

Step	Action
12.	Run Statuses (continued)
	A Run Status of <b>No Success</b> indicates that the process deadlocked with another process. The user will:
	1. Click on the <b>Details</b> link;
	2. Click Restart; and
	3. Click OK to restart the process.
	NOTE: If restarting the process results in a No Success again, the user should open a Help Desk ticket.
13.	Run Statuses (continued)
	A Run Status of <b>Error</b> indicates that the program failed. The user should open a Help Desk ticket to report the error.



Step	Action
14.	Click the <b>Go back to Requisitions</b> link to return to the Requisition header page. Go back to Requisitions

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Step	Action
15.	In this example the Budget Status is Error.
	NOTE: The Budget Status must be Valid in order for the requisition to be sourced as a P.O.
	Click the <b>Error</b> link to view the error message.

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Step	Action
16.	The error message displays in the Exceptions column.
	Click the Close (X) button to exit the screen.
17.	NOTE: The error must be corrected and the Budget Check re-run in order for the requisition to be sourced as a P.O.
18.	This completes <i>Budget Check a Requisition</i> . End of Procedure.

## Change a Chartstring on a Budget Checked Requisition

#### Procedure

In this topic you will learn how to Change the ChartString on a Budget Checked Requisition.

Step	Action
1.	NOTE: The procedures outlined in this topic can only be performed on a requisition that has not been sourced to a Purchase Order (PO) or Request for Quote (RFQ) by Purchasing. If the end-user attempts to perform these procedures and receives a message advising that the requisition (or at least one line on the requisition) has been sourced and cannot be canceled, he/she should contact the Buyer or Purchasing for assistance.
	The following must exist for this procedure to be successful: <b>Requisition Status</b> : Approved <b>Budget Check Status</b> : Valid <b>Purchase Order</b> : None existing

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Step	Action
2.	Click the <b>Main Menu</b> button. Main Menu

Step	Action
3.	Click the <b>Purchasing</b> menu. Purchasing
4.	Click the <b>Requisitions</b> menu. Requisitions
5.	Click the Add/Update Requisitions menu. Add/Update Requisitions

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Step	Action
6.	Click the Find an Existing Value tab.
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Step	Action
7.	Your Business Unit should default into the Business Unit field when working in Production. If it does not contact your Buyer or Purchasing Superuser.
8.	<ul> <li>Search for Existing Requisitions To search for existing requisitions, you <u>must</u> enter all or part of one of the following search criteria: <ul> <li>Requisition ID - to view a specific requisition; or</li> <li>Requester - to view the requisitions entered by a specific requester.</li> </ul></li></ul>
9.	Requester         You <u>must</u> enter the requester's <u>user id</u> into the Requester field. If you enter the requester's name in the Requester field you will receive the following message: "No matching values were found".         The Requester field is not case sensitive unless the Case Sensitive box is checked. If the Case Sensitive box is checked, you <u>must</u> enter the requester's user id in ALL CAPS.

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▼ Search Criteria           Business Unit:         = ♥           Requisition ID:         begins           Requisition Name:         begins           Requisition Status:         =           Origin:         begins           Requester:         begins           Hold From Further Processing         ■           □ Case Sensitive         ■	LSUSH						
Search Clear Basic Search	n 📑 Save Search Criteri	a					

Step	Action
10.	If the Case Sensitive box is unchecked, you will retrieve <u>all</u> records (i.e. options entered in upper, lower or mixed case). By checking the Case Sensitive box, you are limiting your options since PS is looking for a case-sensitive match (i.e. information is entered in ALL CAPS).
11.	Requester Name
	To search by Requester Name, enter the last name of the requester. If you want to search for a requester by first name, change the search filter from "begins with" to "contains".
12.	Requisition Status:
	If you did not enter a Requisition ID, but instead enter the requester's user id to search, you should select a Requisition Status of Approved to narrow your search.
13.	Enter the desired information into the <b>Requisition ID</b> field. Enter "0062988".
14.	Click the Search button.
15.	Scenario
	<ul> <li>In this example you will cancel a line on a budget checked requisition by completing the following:</li> <li>1. Add a new line to the Schedule page;</li> <li>2. Cancel Line 1 on the Schedule page;</li> <li>3. Enter the desired Quantity and Price on Line 2 of the Schedule page; and</li> <li>4. Change the Account Code on the Distribution page from 546700 to 536298.</li> </ul>

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Step	Action
16.	NOTE: The current requisition Status is Approved and the Budget Status is Valid.

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Step	Action
17.	You must navigate to the Schedule page in order to cancel a line on a budget checked requisition. Click the Schedule button.

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Step	Action
18.	A new line <u>must</u> be added to replace the line being cancelled. The new line <u>must</u> be added <u>prior</u> to canceling the desired line to prevent save errors from occurring. Click the Add multiple new rows at row 1 button.

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Step	Action
19.	A Prompt box will open. You may enter the number of rows to be added (if you have multiple distribution lines). The default is 1. Click the <b>OK</b> button.
	Cancel

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Step	Action
20.	Click the <b>OK</b> button.

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Step	Action
21.	Click the Cancel Schedule button for Line 1.

If a requisition **Schedule** page contains <u>more than one</u> distribution line (i.e. distribution of funds is split to more than one ChartString), clicking the Cancel button will result in cancellation of <u>all</u> distribution lines for that requisition line.

An alternative method to re-entering all distribution lines is to copy the requisition to a new requisition and then make the necessary changes to the distribution lines before Budget Checking the requisition. The old requisition would need to be cancelled by Purchasing after you have copied the requisition.

See the "Copy a Requisition from an Existing Requisition" topic in the Managing Non-Contract Requisitions manual.



Step	Action
22.	NOTE: If an attempt is made to cancel a requisition distribution line after the requisition has been sourced, a warning message will display advising that at least one line has been sourced to a PO or RFQ and the requisition cannot be cancelled.
	If this message displays: Click <b>OK</b> and cease these procedures, as they do not apply to this requisition. Contact your Buyer or Purchasing for further assistance.

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Step	Action
23.	If the requisition has not been sourced to a PO or RFQ and the line can be cancelled, a warning message will display advising you that canceling the requisition line will create a change order. Click the <b>Yes</b> button.
24.	The status on the line 1 is changed to Cancelled.
25.	Enter the desired information into the <b>Quantity</b> field. Enter "1".
26.	Enter the desired information into the <b>Price</b> field. Enter "24.99".

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Step	Action
27.	Click the <b>Distribution</b> button.

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Step	Action
28.	Enter the desired information into the Account field. Enter "536298".
29.	In this example, the chartstring contains a Project/Grant number. Project/Grant numbers can be added/changed/deleted as needed.
30.	Click the <b>OK</b> button.

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32.	Click the <b>Return to Main Page</b> link. Return to Main Page

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33.	The Requisition Status may now say Pending or Approved, but the Budget Status is Not Checked. The requisition <u>must</u> be Approved and Budget Checked again before it can be sourced to a PO or RFQ.	
34.	This completes <i>Change a Chartstring on a Budget Checked Requisition</i> . <b>End of Procedure.</b>	