

Budget Check Requisition (Manual)

Once a Requisition is approved, then it will be included in a Budget Check that is run in a batch process periodically throughout the day. Budget Check may be conducted manually for requisitions with a status of Approved or Canceled. Budget Check creates the pre-encumbrance for approved Requisitions. Budget Check releases the pre-encumbrance for canceled requisitions.

Step	Action
1.	Enter https://home.cunyfirst.cuny.edu in your browser's address bar: - Enter your Username and Password and click the Log In button. - From the Enterprise Menu, select the Financials Supply Chain link.
2.	Navigate to: eProcurement > Manage Requisitions .
3.	On the Manage Requisitions page in the Search Requisitions section, enter or  look up the Business Unit . Note: By default, the Business Unit based on the User's profile displays.
4.	Enter any additional known search criteria.
5.	Click the Search button.
6.	The search results display on the page in the Requisitions section. On the row with the Requisition ID to be budget checked from the Select Action  dropdown menu, select the Check Budget list item and then select the Go button.
7.	The Manage Requisitions page displays. In the Budget column one of these two statuses display: Valid – This status displays when there is sufficient budget in the entered Chartfields account. The designated amount is pre-encumbered as a result of the Budget Check. Error – If the Error status displays, then validate the Chartfields. As needed, correct the Chartfields information. Note: To view and edit the Chartfields, navigate to the 3. Review and Submit link. In the Requisition Lines section, select the  expand icon of each line to review Chartfield details. As needed to edit these fields of the Requisition, click the Modify Line/Shipping/Accounting button. In the Accounting Defaults section, on the Chartfields 1 and Chartfields 2 tabs, edit the values. Note: Any change to the Chartfields will reinitiate the Approval workflow for this requisition.
8.	As needed, on the row with the Requisition ID to be budget checked again from the Select Action  dropdown menu, select the Check Budget list item and then select the Go button.
9.	If the Error status displays again, then select the Errors link to get more information about the specific budget error and then contact the college Budget Office.
	End of Procedure.