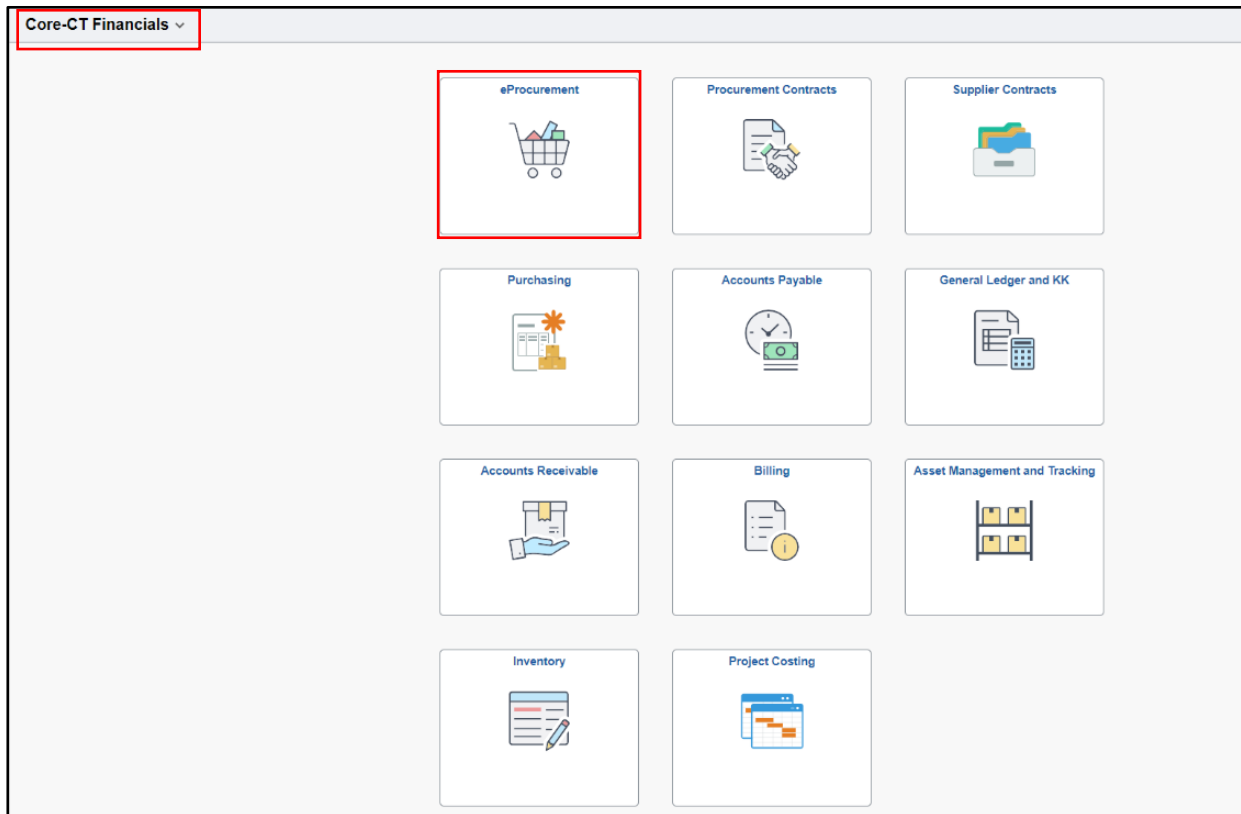# eProcurement Requisition – Budget Errors

Users should use the navigation below to check Requisition Budget errors.
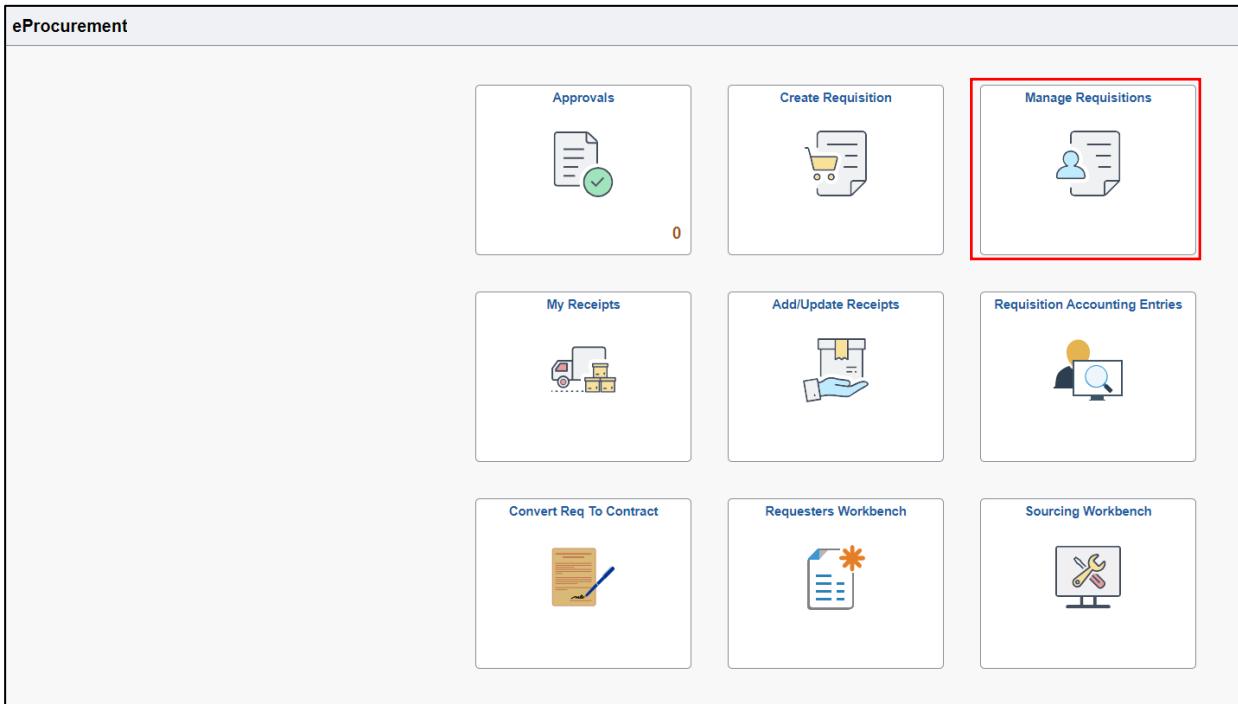
Navigation:

Select *Core-CT Financials*
Click the *eProcurement* Tile

Then select the *Manage Requisitions* Tile

The Requisition Budget Status says "Error". Click on the triangle to the left of the requisition ID and click **Edit** which will display on the actions menu.

My Requisitions

| Requisition Search | Keyword Search |

7 rows

Action ↑↓	Requisition Name ↑↓	Business Unit/Requisition ID ↑↓	Requisition Date ↑↓	Requester ↑↓	Name ↑↓	Request State ↑↓	Budget Status ↑↓	Total Amount ↑↓	
⊙	0000005638	AESM1/0000005638	02/27/2024	000191	DOC	Approved	Not Chk'd	8.02 USD	>
⊙	0000005634	AESM1/0000005634	02/05/2024	000191	DOC	Approved	Not Chk'd	50.33 USD	>
⊙ **Actions ✕** Details		AESM1/0000005633	01/31/2024	000191	DOC	Pending	Not Chk'd	2,700,240.00 USD	>
⊙ Copy		AESM1/0000005632	01/30/2024	000191	DOC	Approved	Not Chk'd	3.26 USD	>
⊙ View Print		AESM1/0000005631	01/30/2024	000191	DOC	Pending	Not Chk'd	134.00 USD	>
⊙ Edit		AESM1/0000005630	01/29/2024	000191	DOC	Pending	Not Chk'd	1,000.00 USD	>
⊙ View Approval		AESM1/0000005629	01/29/2024	000191	DOC	Approved	Error	100.00 USD	>

Select the **Checkout** button.

Edit Requisition

| Continue Shopping | Update Cart | Checkout |

Edit Shopping Cart for Requisition ID 0000005629

1 item(s) to buy now.

∨ **Requisition Summary**

Business Unit AESM1
Requisition Name 0000005629
Requester 000191 DOC
Currency USD

1 row

Item Description ↑↓	Status ↑↓	Price ↑↓	Currency ↑↓	Quantity ↑↓	Unit of Measure ↑↓	
🔔 test	Approved	10.00	USD	10	1 🔍	🗑 Delete

| | Total **100.00 USD** |

Click on the **Error Details** link in the Budget Status field which will take you to commitment control to view why your requisition is in Budget Error.

Edit Requisition

Checkout for Requisition ID 0000005629

Requisition Defaults

Order Total **100.00 USD**
Pre-Encumbrance Balance **100.00 USD**
Pre Encumbrance Details

∨ **Requisition Summary**

Business Unit AESM1 Agricultural Experiment Sta
Requisition Name 0000005629
Requester 000191 DOC-Checo
Currency USD

💬 Header Comments
🔍 Preview Approvals

Priority Medium ∨
Requisition Type Requisition ∨
Dispatch Method Print ∨
Obligation Amount

Budget Check Status ⊗ Error Error Details

∨ **Justification Comments**

∨ **Requisition Lines Overview**

☐ Select All Actions ⊙

1 row

		Line 1 Special Request test	Status Approved	Quantity 10	Unit of Measure 1 🔍	Price 10.00	Currency USD	Total 100.00 USD	📅 ScheduleDetails >
☐	🔔	Item ID Supplier TOWN OF ANDOVER 💬 Line Comments 🗑 Delete							

Order Total **100.00 USD**
Pre-Encumbrance Balance **100.00 USD**
Pre Encumbrance Details

Resolving Budget Errors in Procurement

This section of the job aids discusses resolving PO and Requisition Budget Errors.

There are several variables, but these are the basic steps.

Most POs and Requisitions fail Budget Check with one of two different Errors:

A) No Budget Exists (something wrong with the Chartfields)

B) Exceeds Budget Tolerance (not enough money in the Budget)

TIP: If the PO or Requisition is closed or canceled and in Budget Error there is no way to make changes to correct the error. A Footprints Help Desk ticket will need to be created to request assistance with clearing the Error.
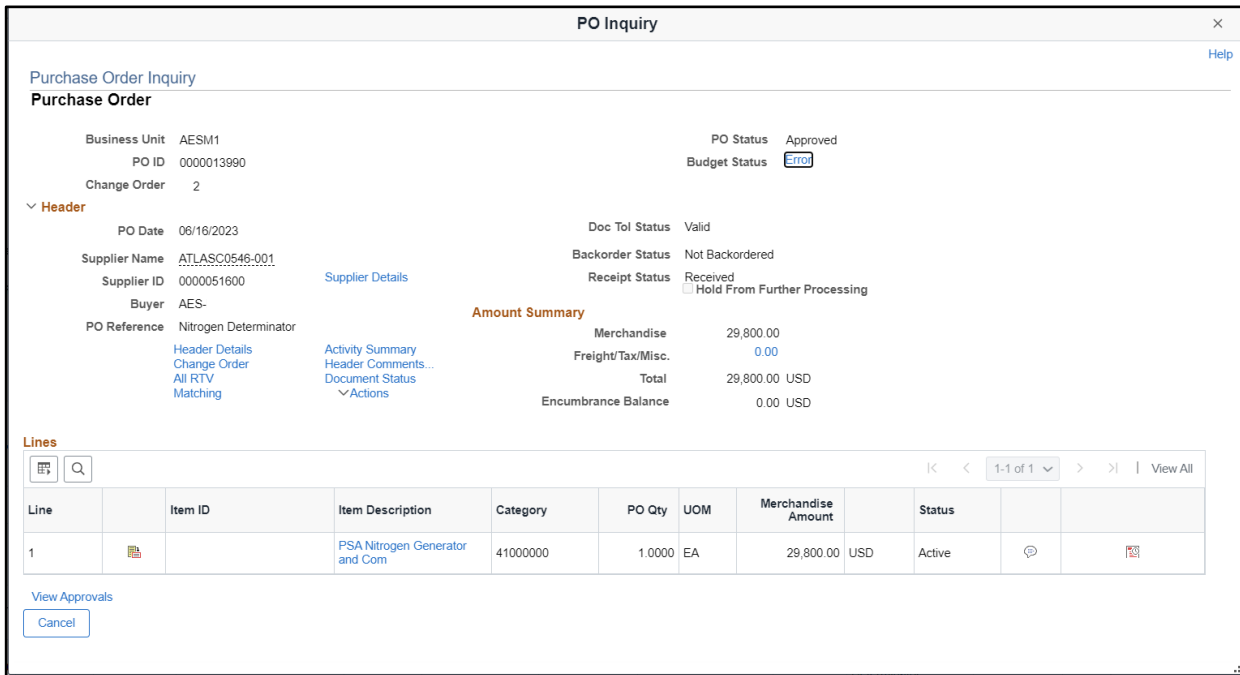
A) No Budget Exists (something wrong with the Chartfields)

Using the fluid dashboard, navigate to: Core-CT Financials > Purchasing > Add/Update PO
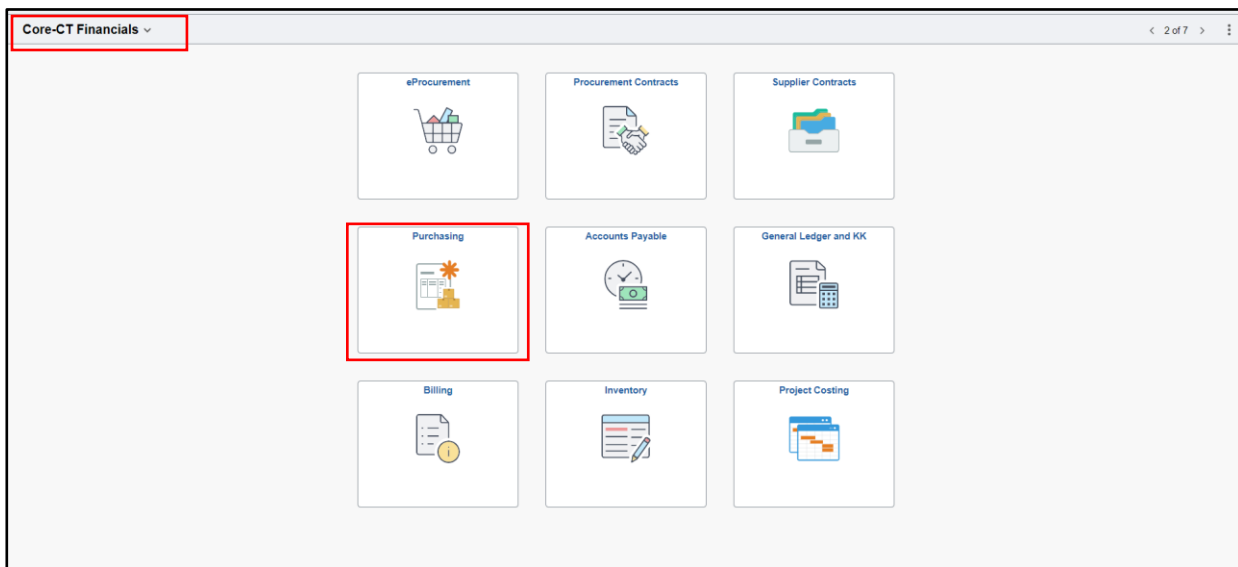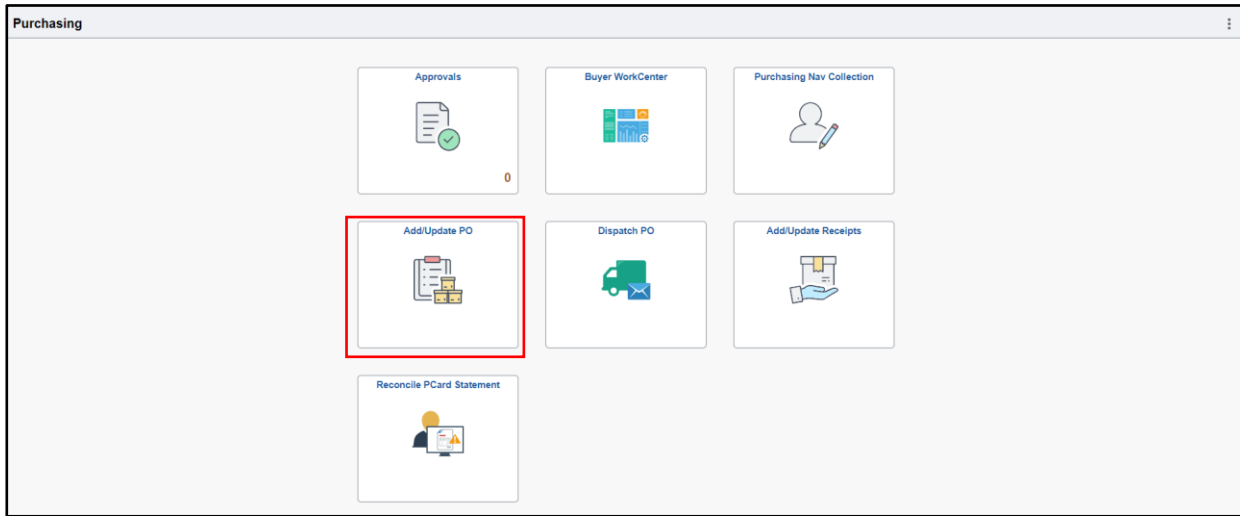
Enter the purchase order number. The Budget Status will display the Error link.

Click on the Error link to display what caused the transaction to fail. In this case, the error is **No Budget Exists**. The PO is failing in both the Allotment Budget (KK_ALLOT) and the Project Budget (KK_PRJ1). Click on the Line Exceptions tab at the top to display what line(s) on the PO is failing. Click on the Budget Chartfields Tab to display the Chartfields used on those lines.

To display the Budget in Commitment Control, click on the Icon at the end of the line Go To ... 📑 .

Click the Go to Budget Inquiry link.

Since the error is **No Budget Exists**, the system cannot display any budget details. The display shows the Chartfield Values that the system used to Budget Check this PO. It will also display other budgets that match Chartfields values. Based on the budget information shown below, it appears that the budget reference field is missing from the Chartfields on the PO. In this case Budget Reference is a mandatory field. The user will need to update the field on the PO with the appropriate budget reference. Once this change is completed and approved, the PO will pass budget check when the next batch process runs. Follow the same steps to review the PRJ1 Ledger Group or any other Ledger Groups (Failing Allotment Budget, Failing PRJ1 Budget).

Purchase Order Exceptions

New Window | Help | Personalize Page

Budget Type KK_ALLOT   Allotment Budget Definition
Business Unit STATE   State of CT

Budget Period 2024

1-6 of 6

ChartField	ChartField Value	Description
Fund Code	12060	Federal & Other Restricted Act
Department	AES48000	CT Agricultural Experimnt Stat
Special ID	90753	Cannabis Regulatory - Interim
Program Code	00000	All Programs
Account	50000	Expenditures
Budget Reference		

*Exception Type Error   Maximum Rows 100
☐ More Transactions Exist

Advanced Transaction Criteria   Budget Detail   ⓘ   Search

Save   Return to Search   Notify

TIP: If there is a PO that is Dispatched and in Budget Error. This would indicate it is a rolled PO. PO roll does not change the status of the PO, but it does run Budget Check which would update the Budget Status. Because we are rolling POs into a new fiscal year, the status may stay Dispatched and in Budget Error. This only happens with rolled Purchase Orders.

B) Exceeds Budget Tolerance (not enough money in the Budget)

Using the Fluid Dashboard, navigate to: Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

Click on the Error Link on the Main Page of the PO.

PO Inquiry   ×

Help

Purchase Order Inquiry
Purchase Order

Business Unit DEPM1   PO Status   Approved
PO ID 0000074355   Budget Status Error

Click on the icon at the end of the line   Go To ...

Review KK Purchase Order Txn

| Purchase Order Exceptions | Line Exceptions |

Business Unit DEPM1   PO Number   0000074355

*Exception Type [Error ▾]   ☐ Override Transaction   ⓘ
Maximum Rows [100]   ☐ More Budgets Exist

[Search]   Advanced Budget Criteria

Budgets with Exceptions

| Budget Override | Budget Chartfields | ‖▷ |

	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1	🔍	STATE	KK_ALLOT	Exceeds Budget Tolerance	More Detail	☐	Go To …
2	🔍	STATE	KK_ALLOT	Exceeds Budget Tolerance	More Detail	☐	Go To …
3	🔍	STATE	KK_ALLOT	Exceeds Budget Tolerance	More Detail	☐	Go To …

[Save]   [Return to Search]   [Notify]

Purchase Order Exceptions | Line Exceptions

Click on Go to Budget Inquiry link.

Help

Please select one of the following links:

Go to Budget Exceptions
Go to Budget Inquiry

[Cancel]

This time the budget that the PO is using based on the Chartfield values entered will display.

The bottom of the page displays the Available Budget after clicking on the Budget Details link. In this example, the amounts are negative indicating there is not enough money in this budget for the PO. If the coding is correct, contact the agency's Budget Unit who will need to determine the appropriate Chartfields, or they will need to add funds to the budget for the PO to Budget Check to Valid.

To locate the Budget Link on a **Requisition** that is in Budget Error:

Using the Fluid Dashboard, navigate to: Core-CT Financials > eProcurement > Manage Requisitions

From the My Requisitions page, click the downward arrow in the Action column and select **Details**

On the Line Details page, the Budget Error Details link is displayed.

Click the Error Details link to display the Error.

Follow the same steps as shown above in PO.

Note: POs or Requisitions that are in Budget Error cannot be closed or canceled until the error is resolved.

TIP: If a PO/Requisition is in Error for No Budget Exists where the distribution line has not been vouchered but it is going to be closed follow these steps to resolve the error: Reduce the amount to zero and change the Chartfield values to another budget where a budget does exist and then let it go through Budget Check. It will not impact the budget because the value is zero, but it should go valid and then the PO or requisition can be closed.