

9.2 Perform Requisition Budget Pre-Check

Purpose: Use this document as a reference for performing a budget pre-check on a requisition in ctcLink.

Audience: Purchasing staff

Perform Requisition Budget Pre-Check

Note: The requisition must be created and saved before the Budget Pre-Check icon can be seen. Budget Pre-Check Status will be "Not Chk'd" before Pre-Budget Check is run.

Navigation: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

1. On the Requisitions search page, select the Find an Existing Value tab.
2. Enter Business Unit.
3. Enter Requisition ID.
4. Select Search. The Requisition page will display.

Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value | Keyword Search | Add a New Value

▼ Search Criteria

Business Unit = [WA170] 🔍

Requisition ID begins with [0000003989]

Requisition Name begins with []

Requisition Status = []

Origin begins with [] 🔍

Requester begins with [] 🔍

Requester Name begins with [] 🔍

Hold From Further Processing

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

5. On the Requisition page, validate that the Budget Status is "Not Chk'd".

- Select the **Budget Pre-Check** icon in **Budget Status**. System starts to perform Pre-Budget Check. This process can take 1-2 minutes.

Maintain Requisitions

Requisition

Business Unit WA170
 Requisition ID 000003989
 Requisition Name Centeplace 7-30-18

Status Open
 Budget Status Not Chk'd

Hold From Further Processing

Header

*Requester 101009508 Payton King
 *Requisition Date 09/12/2018
 Origin ONL On Line Entry
 *Currency Code USD Dollar
 Accounting Date 09/12/2018

Requisition Defaults Add Comments
 Requisition Activities Add Request Document
 Document Status

Amount Summary

Total Amount 138.00 USD

Add Items From **Select Lines To Display**

Purchasing Kit Catalog
 Item Search Requester Items

Search for Lines
 Line To Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Centerplace Use	1.0000	NTE	971	138.00000	138.00	Open

View Printable Version View Approvals Delete Requisition *Go to ...More...

Save Return to Search Notify Refresh Add

- Verify that the **Budget Status** is now "Prov Valid".
- If errors are found, **Budget Status** shows "Error". Fix the error(s) as needed and try again.
- Select **Save**.

Maintain Requisitions

Requisition

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 Requisition Name Centeplace 7-30-18

Status Open
 Budget Status Prov Valid

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View Printable Version View Approvals Delete Requisition *Go to ...More...

Save Return to Search Notify Refresh Add

10. Budget Pre-Check is done successfully. The Requisition is now ready to be submitted for Approval and Budget Check.
11. Process complete.