Budget Checking Errors

How to check for budget errors on a voucher?
– the process is similar in all modules

After budget checking process has been run on vouchers.

- Open the voucher
- On the Summary tab check the Budget Status
- For exceptions click on the **Exceptions link**

A new page will open with the error

- Within the details at the bottom of the page there is a message showing the exception description

this example shows that no budget exists; click the magnifying glass for more CFS information

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- A voucher line screen will show the detailed CFS that is causing the error

Payables Voucher Line Drill Down ✕

Transaction Line Identifiers   Help
     Business Unit   OUHSC   **Voucher ID**   10094837

Additional Source Information
     Invoice Number   STU27220330
     Supplier ID   9000004282

Transaction Line Details

Account	Fund	Org	Function	Entity	
600100	CLNOP	ADH03001	00116	00000	

     Line Status   Error
     Budget Date   03/30/2022
     Line Amount   25.00   USD

OK

In this example no budget exists for the CFS entered on the voucher. The CFS must be corrected or sufficient budget posted for the CFS.

Another common budget checking error is this:

Budget Override	Budget Chartfields	‖▶		
	Details	Business Unit	Ledger Group	Exception
1	🔍	OUHSC	OU_OP	Exceeds Budget Tolerance

This is an example of the CFS not having enough budget available for the amount necessary to cover the total expense. Budget will have to be added or a Req, PO, or Voucher will need to be cancelled and budget restored to the available balance.

A second way to check for budget errors is using the Budget Check Exceptions pages. The menu navigation is:
Main Menu → Commitment Control → Review Budget Check Exceptions

From here you'd select from **Account Payable** or **Purchasing** depending on what error you are looking for.

Budget Checking Errors
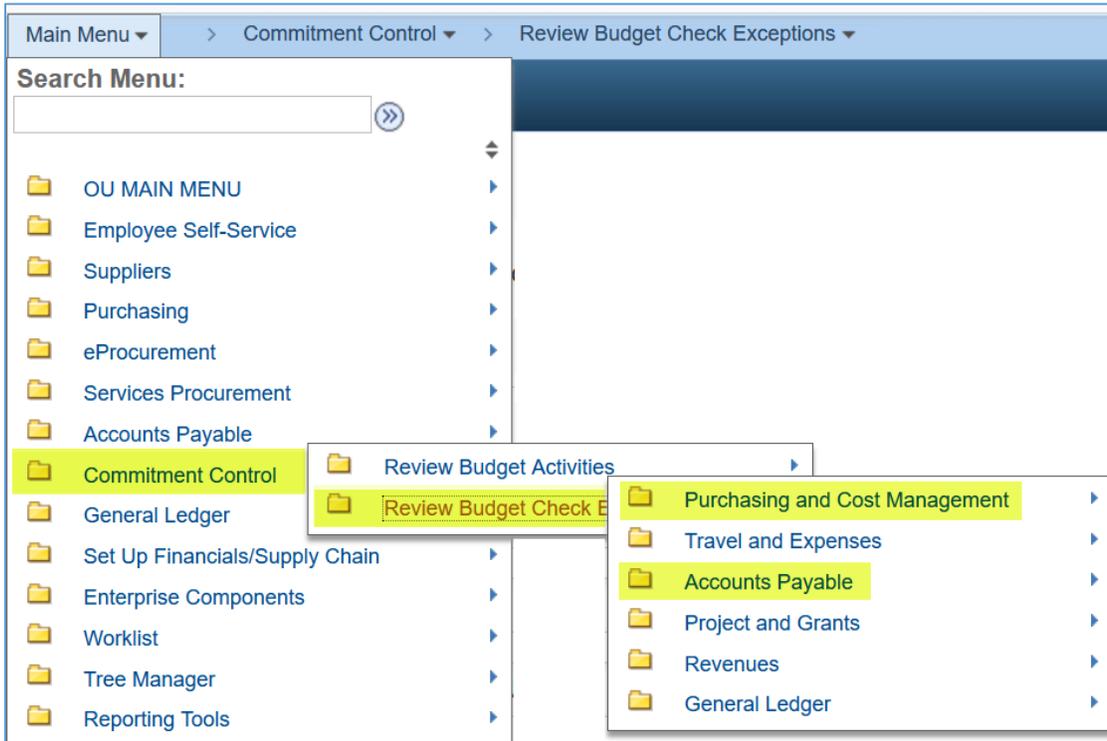
Continuing the previous voucher example, select **Accounts Payable** from the menu. From the search page enter the **Business Unit** and **Voucher #** then click on **Search**.

on this screen enter the Business Unit and Voucher# then click Search

At this point you'll see the voucher exceptions screen from the first method and working through the budget issues is the same process as shown before.