

## QUICK REFERENCE GUIDE

### *Change Funding on an ePro Requisition*

June 26, 2012

If an incorrect funding (chartfield) string was used on a requisition, it will need to be updated. You may also need to update the budget year on a requisition if it is incorrect.

Keep in mind, these actions can only be done if the requisition has not yet been sourced to a strategic sourcing event, or a purchase order. If this has already happened, the accounting information cannot be updated on the requisition and must be updated on the purchase order (or contract if the strategic sourcing event was sourced to a contract) . If the purchase order (and any other subsequent documents, if they exist; i.e. contracts, receipts, etc.) is cancelled and the pre-encumbrance restored, the requisition can then be updated.

### Update Chartfield Information

1. **Navigate** to eProcurement, Manage Requisitions

2. Enter the Business Unit (BU)
3. Enter the Requisition ID
4. Click **Search**

Req ID	Requisition	Agency Ref	BU	Origin	Date	Status	Budget	Total	
<a href="#">1000000044</a>	Offset Printing Equip M...	192719	P7801	978	04/05/2012	Approved	Valid	70,000.00 USD	<Select Action> <Select Action> Cancel Requisition Copy Requisition <b>Edit Requisition</b> Requisition Cycle View Approvals View Printable Version

[Create New Requisition](#)   
 [Review Change Request](#)   
 [Review Change Tracking](#)   
 [Manage Receipts](#)   
 [Requisition Report](#)

5. Select the **Edit Requisition** option from the drop down menu
6. Click **Go**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	<a href="#">Offset Printing Equipment Main</a>	PRESSTEK INC	1.0000	EACH	70,000.00000	70,000.00

[Select All / Deselect All](#)
Total Amount: 70,000.00 USD  
Pre-Encumbrance Balance: 70,000.00 USD

7. Locate the line for which the funding string needs to be updated
8. Click on the **Expand Section** icon  at the far left of the line

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	<a href="#">Offset Printing Equipment Main</a>	PRESSTEK INC	1.0000	EACH	70,000.00000	70,000.00

Consolidate with other Reqs
  Override Suggested Vendor

**Shipping Line:** 1    **Due Date:** 05/04/2012    **Quantity:** 1.0000    **Price:** 70,000.00000

**Status:** Active    **\*Ship To:** P780000325    [Modify Onetime Address](#)  
**Attention To:** Mangen, Gina M    [Edit Shipto Comments](#)

**\*Distribute By:** Qty    **SpeedChart:**

Fund	Fin DeptID	Appropriation	Account	Sub Acct	SW Cost	Agcy Cost 1	Agcy Cost 2	PC Bus Unit	Project
4400	P7835034	P785026	415001						

9. Click on the **Chartfields2** tab

Fund	Fin DeptID	Appropriation	Account	Sub Acct	SW Cost	Agcy Cost 1	Agcy Cost 2	PC Bus Unit	Project
1000	P0732212	B041G06	415001						

10. Update the chartfield values as needed
11. Click on the **budget information** tab

Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbrance Balance	Pre-Encumbered Base Balance
Warning	04/05/2012	70,000.00	70,000.00 USD	70,000.00 USD

12. Change the date to the new fiscal year if necessary
13. Update additional lines as needed

 Check Budget	 Pre-Check Budget	Budget Checking Status: <b>Not Checked</b>	
 Save & submit	 Save & preview approvals	 Cancel Changes	<a href="#">Find more items</a>

14. Click **Save and submit**.

<a href="#">View printable version</a>	<a href="#">Manage Requisitions</a>	<a href="#">Create New Requisition</a>		
<a href="#">Submit</a>	<a href="#">Edit Requisition</a>	<a href="#">Apply Approval Changes</a>	<a href="#">Check Budget</a>	<a href="#">Pre-Check Budget</a>

15. Click **Check Budget**

Ensure the budget check is valid once it is complete; if not, the budget error must be resolved.