



Approving Budget Overrides

ePro & EIS



ePro Budget Exceptions

- When a Requisition, Change Request or a Service Form Request is returned to a Requestor due to a budget exception for “available funds exceeded”, best practice is to “Move the money” and resubmit.
- An alternative method is to work with your budget office to get an override. This is done on a case-by-case basis and should not be the normal manner of doing business.



ePro Budget Exceptions

Budget Override Request completed by Requestor:

Once a requestor completes the budget override information, they will see the below and if they have completed all the information needed for the requisition, they will submit by clicking the Place Order button.

Requisition • 3837468

Assign Cart Place Order

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Cart Name 2023-08-08	Ship To	Bill To
Description Budget Override Quick Guide	Deliver to: Construction Requestor	Email to: invoices@untsystem.edu
Business Unit Univ. of North Texas System (SY769)	Bldg/Rm: N/A	UNT System Business Service Center
Department UNT System Admin (SY769)	1112 Dallas Dr.	1112 Dallas Dr. Ste. 4200
Accounting Date 8/8/2023	Denton, TX 76205	Denton, TX 76205
PR Override ✗	United States	United States
Budget Date	Delivery Options	
Request Budget Override ✓	Delivery JAG_CONSYS	
Budget Override Justification Budget Override Quick Guide	Location Construction ? System	
	Requested no value	
	Delivery Date	
	Expedite ✗	
	Ship Via Best Carrier-Best Way	

Summary

Approver, Budget

Workflow

- Show skipped steps
- Draft Active Byron Campos
- OFAC Check Future
- Budget Override Approval** Future
- Initial Validation Request Future



ePro Budget Exceptions

Budget Override Request completed by Requestor:

After the Place Order button is clicked, the requisition will begin going through the approval process.

The requisition shows that is currently at the Budget Override Approval step – status equal Active. Once the step is triggered, the approvers listed in the step will receive a notification and an email.

Requisition • 3837468

Summary Taxes/S&H PO Preview Comments Attachments History

General **Shipping** **Billing**

Status **Pending**
Budget Override Approval

Submitted 8/8/2023 1:55 PM

Cart Name 2023-08-08

Description Budget Override Quick Guide

Business Unit Univ. of North Texas System (SY769)

Department UNT System Admin (SY769)

Accounting Date 8/8/2023

PR Override Budget Date **X**

Request Budget Override **✓**

Budget Override Budget Override Quick Guide

Ship To

Deliver to: Construction Requestor
Bldg/Rm: N/A
1112 Dallas Dr.
Denton, TX 76205
United States

Delivery Options

Delivery Location JAG_CONSYS
Construction ? System

Requested Delivery Date no value

Expedite **X**

Ship Via Best Carrier-Best Way

Bill To

Email to: invoices@untsystem.edu
UNT System Business Service Center
1112 Dallas Dr. Ste. 4200
Denton, TX 76205
United States

Summary


- Submitted 8/8/2023 1:55 PM
Byron Campos
- OFAC Check Completed
- Budget Override Approval** Active
- Initial Validation Request Future
- Purchasing Review Future
- Department Catch-All Future
- Final Validation Request Future



ePro Budget Exceptions

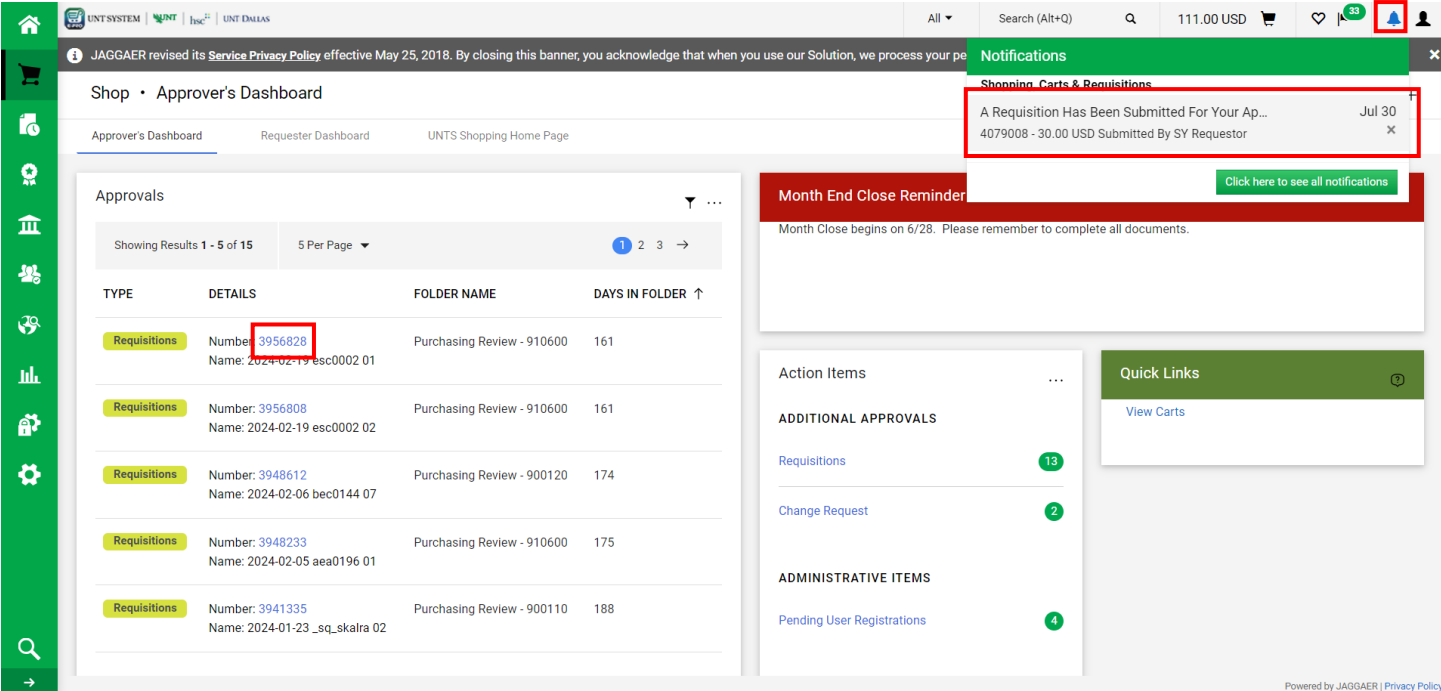
Approving a Budget Override Request in ePro

Once you're on your Home page, you have different options for retrieving requisitions you need to approve.

Click on Notifications  and you will get a list of items that need your attention.

Click on one of the Hyperlinks:

- Requisition hyperlink showing a Folder Name of your Business Unit characters plus Budget Override Approval (i.e., SY Budget Override Approval)



The screenshot displays the 'Approver's Dashboard' in the ePro system. At the top, there is a navigation bar with 'Shop' and 'Approver's Dashboard' selected. A notification banner at the top right states: 'A Requisition Has Been Submitted For Your Ap... 4079008 - 30.00 USD Submitted By SY Requestor' with a close button. Below the notification, a 'Month End Close Reminder' banner indicates 'Month Close begins on 6/28. Please remember to complete all documents.' The main content area features a table of 'Approvals' with columns for 'TYPE', 'DETAILS', 'FOLDER NAME', and 'DAYS IN FOLDER'. The first row is highlighted, showing a requisition number of 3956828 and a folder name of 'Purchasing Review - 910600'. Other requisitions listed include 3956808, 3948612, 3948233, and 3941335. On the right side, there are sections for 'Action Items' (with 13 additional approvals, 2 change requests, and 4 administrative items) and 'Quick Links' (with a 'View Carts' link).

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER ↑
Requisitions	Number: 3956828 Name: 2024-02-19_esc0002 01	Purchasing Review - 910600	161
Requisitions	Number: 3956808 Name: 2024-02-19_esc0002 02	Purchasing Review - 910600	161
Requisitions	Number: 3948612 Name: 2024-02-06_bec0144 07	Purchasing Review - 900120	174
Requisitions	Number: 3948233 Name: 2024-02-05_aea0196 01	Purchasing Review - 910600	175
Requisitions	Number: 3941335 Name: 2024-01-23_sq_skalra 02	Purchasing Review - 900110	188



ePro Budget Exceptions

Approving a Budget Override Request in ePro

- Click Requisitions to Approve hyperlink. The hyperlink will take you to the Approvals page. On the Approvals page, you will see a folder of your Business Unit characters plus Budget Override Approval (i.e., SY Budget Override Approval). Expand the folder to see Budget Override Requests that need approval.

The screenshot displays the 'Approvals' interface. At the top, there's a search icon and a 'Submit Date Newest First' dropdown. Below is a navigation bar with 'Requisitions 2' (highlighted), 'Change Requests', 'Invoices 2', 'Contracts', 'Solicitations Evaluation', 'Solicitations', 'Procurement Requests', and 'Contract Requests'. The main area shows 'Your Selections' on the left with a 'Date Range' dropdown set to 'All Dates' and a 'Budget Override Approver' filter. The main list shows 'Total Results 1' and 'Display 20 per folder'. Two folders are listed: 'MY PR APPROVALS 1' and 'SY BUDGET OVERRIDE APPROVAL 1', with the latter highlighted by a red box.



ePro Budget Exceptions

Approving a Budget Override Request in ePro

Once you retrieve a requisition you need to approve, click on the three dots “...” at the top of the page to perform one of the actions from the dropdown menu.

To approve the Budget Override Request, click on **Approve** and that’s all you need to do.

Requisition • 3837468

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Budget Override Approval	Ship To Deliver to: Construction Requestor Bldg/Rm: N/A 1112 Dallas Dr. Denton, TX 76205 United States	Bill To Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
Submitted 8/8/2023 1:55 PM	Delivery Options	
Cart Name 2023-08-08	Delivery Location JAG_CONSYS Construction ? System	
Description Budget Override Quick Guide	Requested Delivery Date no value	
Business Unit Univ. of North Texas System (SY769)	Expedite X	
Department UNT System Admin (SY769)	Ship Via Best Carrier-Best Way	
Accounting Date 8/8/2023		
PR Override Budget Date X		
Request Budget Override ✓		
Budget Override Budget Override Quick Guide		

Assign To Myself

- Assign to myself
- Approve
- Copy to New Cart
- Add Comment
- Add Notes to History
- View My Orders (Last 90 Days)
- Continue Shopping
- View Carts

Workflow

- OFAC Check Completed
- Budget Override Approval Active
- Initial Validation Request Future
- Purchasing Review Future
- Department Catch-All



ePro Budget Exceptions

Approving a Budget Override Request in ePro

You can also add a comment here prior to approving by clicking on **Add Comment**.

Add Comment ✕

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Budger Override Approver (Approved) <JaggaerAdmin@untsystem.edu>

Buyer one (Approved) <UNTS-JaggaerTest@untsystem.edu>

Byron Campos (Prepared by, Approved) <Byron.Campos@untsystem.edu>

1000 characters remaining [expand](#) | [clear](#)

Add Comment Close



ePro Budget Exceptions

Approving a Budget Override Request in ePro

If you click on **Assign to Myself**, you will get another set of options which include not approving the Budget Override Request by selecting **Return to Requisitioner**.

Also, when **Assign to Myself**, you're able to make updates to the requisition by clicking on one of the pen icons.

Requisition • 3837468

Summary Taxes/S&H PO Preview Comments Attachments History

Edit General Section

General	Shipping	Billing
Status: Pending Budget Override Approval (Budget Override Approver)	Ship To: Deliver to: Construction Requestor Bldg/Rm: N/A 1112 Dallas Dr. Denton, TX 76205 United States	Bill To: Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
Submitted: 8/8/2023 1:55 PM	Delivery Options: Delivery Location: JAG_CONSYS Construction ? System	
Cart Name: 2023-08-08	Requested Delivery Date: no value	
Description: Budget Override Quick Guide	Expedite: X	
Business Unit: Univ. of North Texas System (SY769)	Ship Via: Best Carrier-Best Way	
Department: UNT System Admin (SY769)		
Budget Date: 8/8/2023		
PR Override: X		
Budget Date Accounting Date		
Request Budget Override: ✓		

Approve/Complete Step

- Approve
- Return to Shared Folder
- Return to Requisitioner**
- Forward to ...
- Copy to New Cart
- Add Comment
- Add Notes to History
- Reject Requisition
- View My Orders (Last 90 Days)
- Continue Shopping

Total (Shipping, handling, taxes, etc.) 100.00

Submitted 8/8/2023 1:55 PM



ePro Budget Exceptions

Approving a Budget Override Request in ePro

It's not recommended for approvers to make any updates to a requisition that has been routed to them for approval. If you see something that needs updating, return the requisition to the requestor by clicking on **Return to Requisitioner**.

A comment can also be added when **Assign to Myself** to include additional information regarding the budget override or for any other information after clicking on **Add Comment**.

Add Comment ✕

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

- Budget Override Approver (Approved) <JaggaerAdmin@untsystem.edu>
- Buyer one (Approved) <UNTS-JaggaerTest@untsystem.edu>
- Byron Campos (Prepared by, Approved) <Byron.Campos@untsystem.edu>

1000 characters remaining [expand](#) | [clear](#)

Add Comment Close



ePro Budget Exceptions

Approving a Budget Override Request in ePro

Note 1: PO's that are created from a requisition that was approved for a budget override will need to be override in EIS

Note 2: Budget Override Requests for invoices follow the same approval process as Requisitions

- PO Invoice (Created Electronic or AP)

Invoices created from a PO in ePro are not budget checked since an encumbrance exists for the PO. Therefore, no Override is needed in ePro or EIS

- Non-PO Invoice (Created by AP)

Override needed in ePro and EIS if budget deficit. AP completes the Budget Override Request and submits for approval.

- Payment Request

Departments complete the Payment Request and AP approves the request to create a non-PO invoice. Departments can complete the Budget Override Request on the Payment Request. Only AP can update the invoices created from a Payment Request.

Override needed in ePro and EIS if budget deficit. AP completes Budget Override Request and submits for approval if not originally completed on the Payment Request.