

# Approving Budget Overrides

UNT System Marketplace & EIS

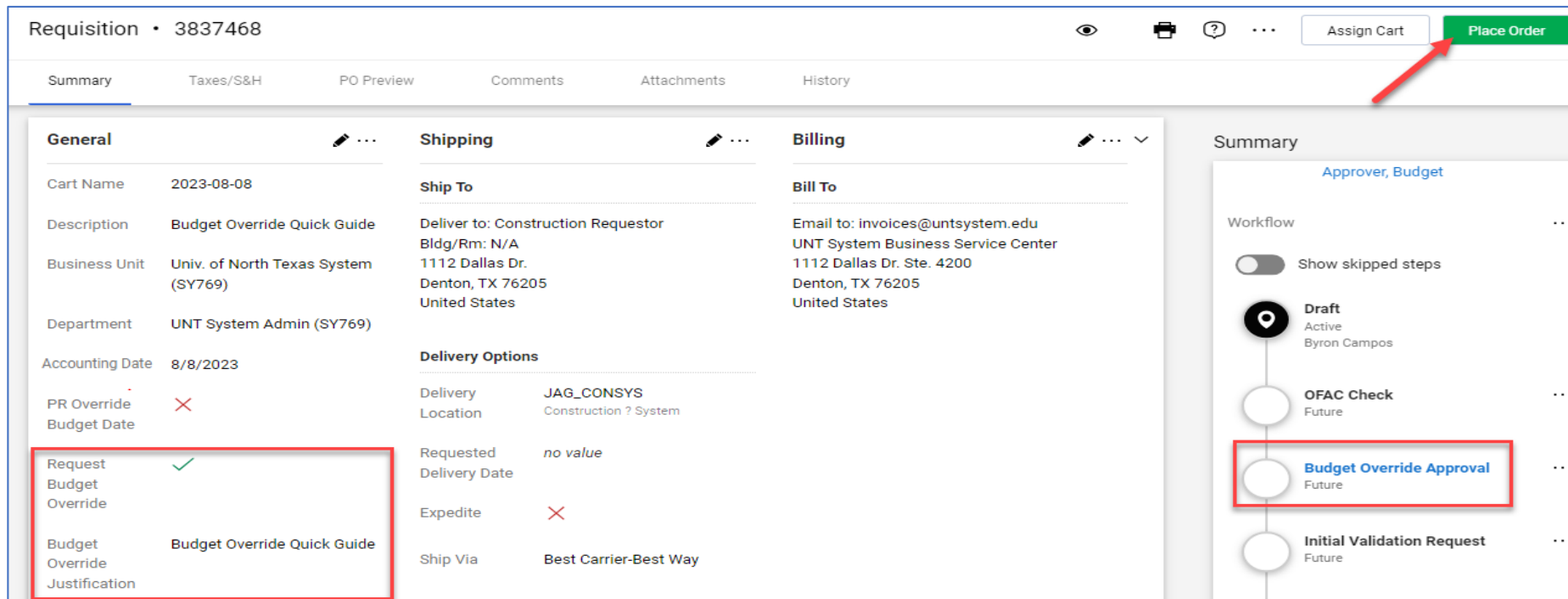
# Marketplace Budget Exceptions

- 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.

# Marketplace 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**  ...


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

Request 

Budget Override

Budget Override Budget Override Quick Guide

Budget Override Justification

**Shipping**  ...

**Ship To**

Deliver to: Construction Requestor

Bldg/Rm: N/A

1112 Dallas Dr.

Denton, TX 76205

United States


**Delivery Options**

Delivery JAG\_CONSYS


Location Construction ? System

Requested no value

Delivery Date

Expedite 

Ship Via Best Carrier-Best Way

**Billing**  ...

**Bill To**


Email to: invoices@untsystem.edu

UNT System Business Service Center

1112 Dallas Dr. Ste. 4200

Denton, TX 76205


United States

Summary  →

Approver, Budget


Workflow ...

Show skipped steps


 **Draft**

Active


Byron Campos

 **OFAC Check**

Future

 **Budget Override Approval**

Future

 **Initial Validation Request**

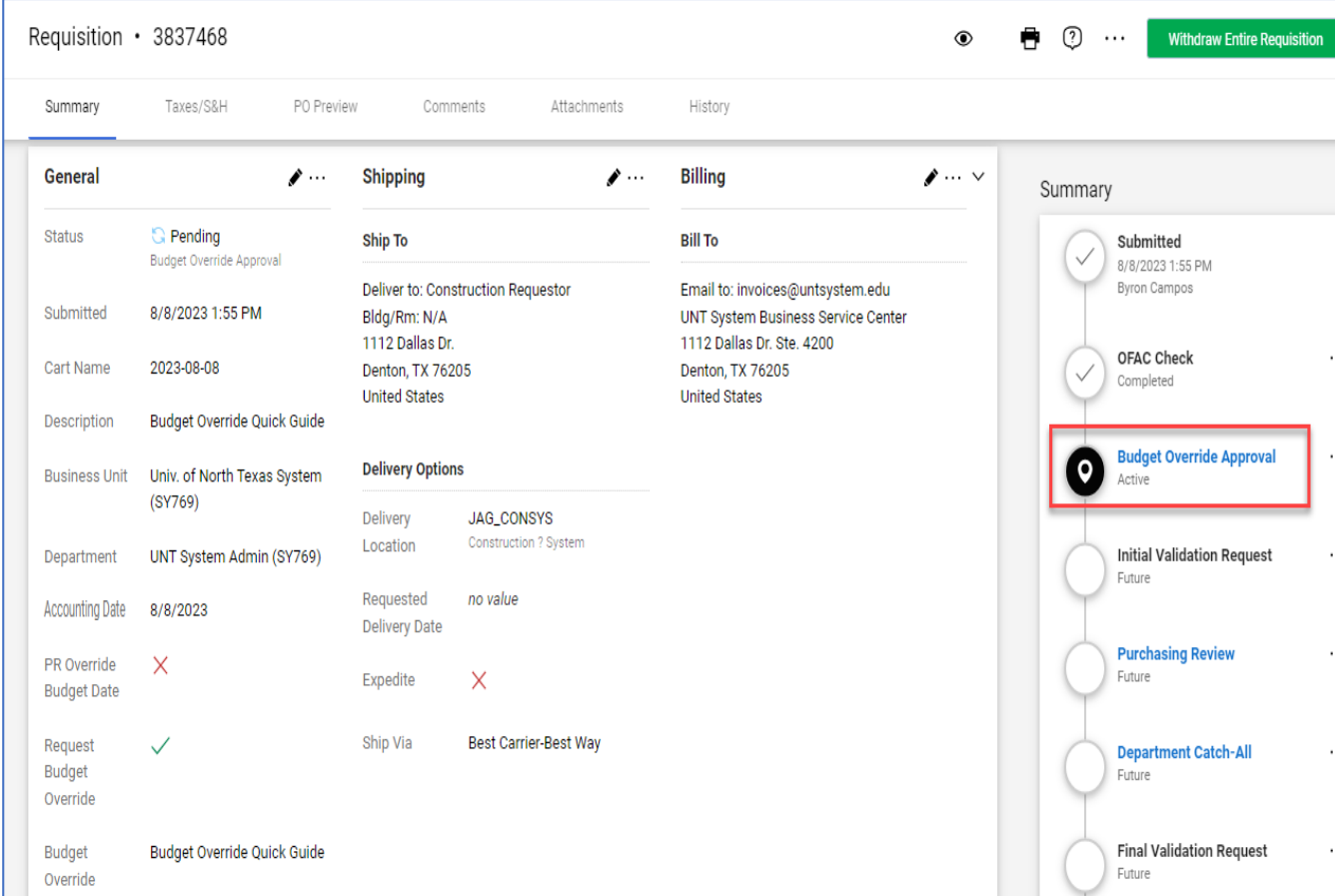
Future

# Marketplace 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	Ship To: Deliver to: Construction Requestor Bldg/Rm: N/A 1112 Dallas Dr. Denton, TX 76205 United States	Bill To: Email to: invoices@untssystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
Submitted: 8/8/2023 1:55 PM	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)		
Accounting Date: 8/8/2023		
PR Override Budget Date: X		
Request Budget Override: ✓		
Budget Override: Budget Override Quick Guide		


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

# Marketplace Budget Exceptions

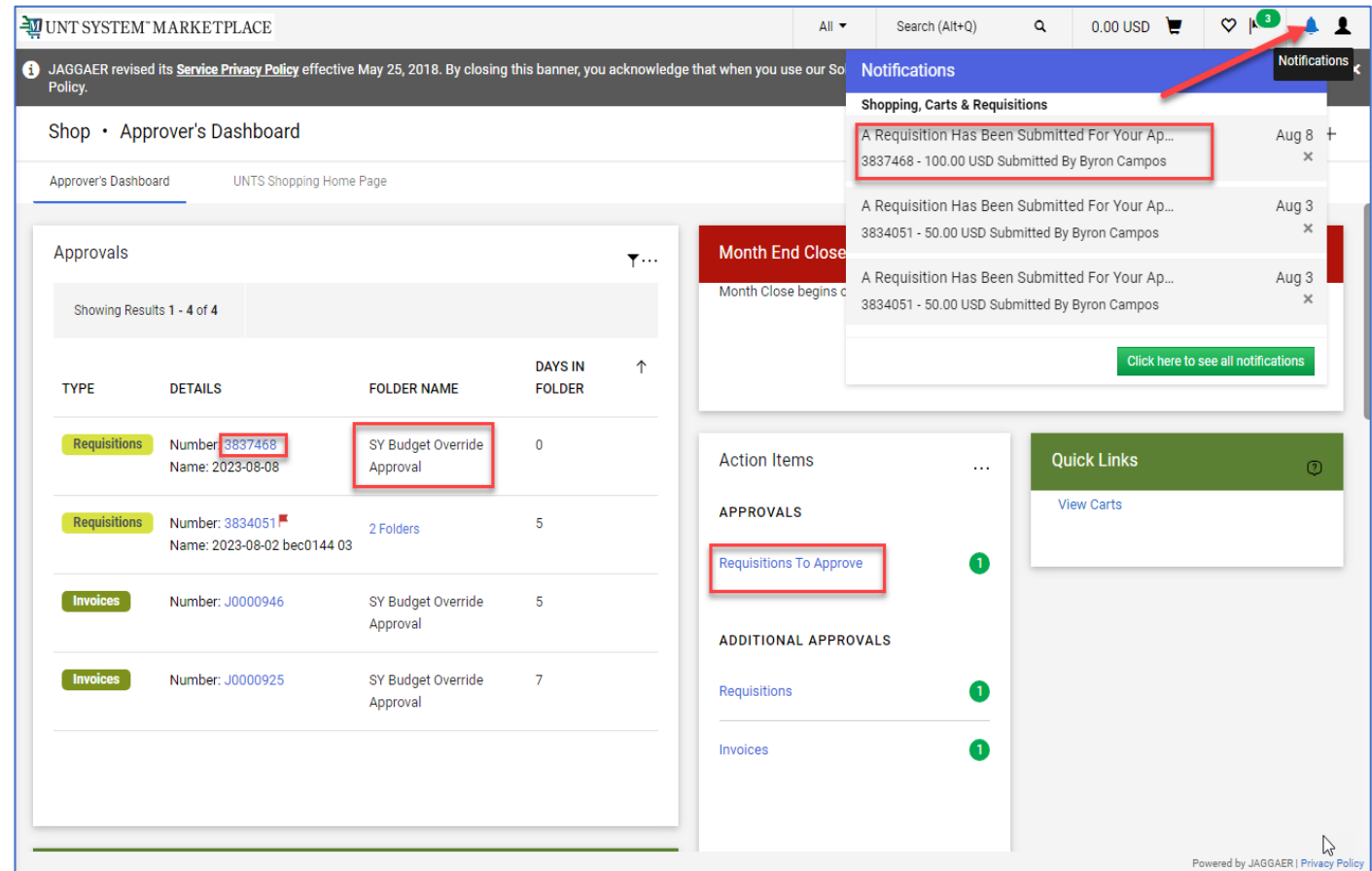
## Approving a Budget Override Request in the Marketplace

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 shows the 'Approvers Dashboard' in the UNT SYSTEM MARKETPLACE. A table lists requisitions and invoices with columns for Type, Details, Folder Name, and Days in Folder. A notification dropdown is open, showing a list of requisitions submitted for approval. A red box highlights the notification for requisition 3837468, and another red box highlights the 'Requisitions To Approve' link in the Action Items section.

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER
Requisitions	Number: 3837468 Name: 2023-08-08	SY Budget Override Approval	0
Requisitions	Number: 3834051 Name: 2023-08-02 bec0144 03	2 Folders	5
Invoices	Number: J0000946	SY Budget Override Approval	5
Invoices	Number: J0000925	SY Budget Override Approval	7

Notifications:

- A Requisition Has Been Submitted For Your Ap... 3837468 - 100.00 USD Submitted By Byron Campos (Aug 8)
- A Requisition Has Been Submitted For Your Ap... 3834051 - 50.00 USD Submitted By Byron Campos (Aug 3)
- A Requisition Has Been Submitted For Your Ap... 3834051 - 50.00 USD Submitted By Byron Campos (Aug 3)

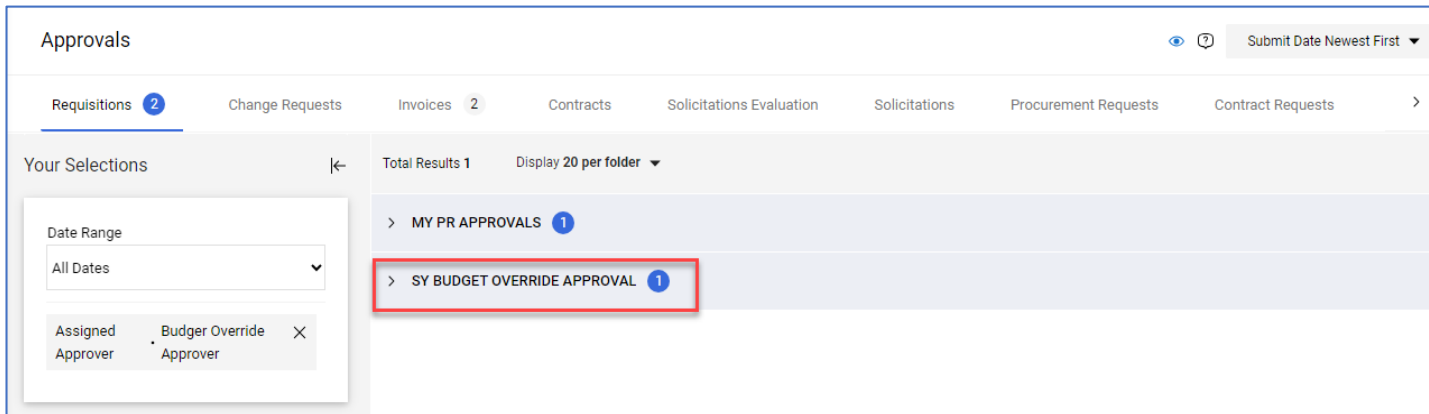
Action Items:

- Requisitions To Approve (1)
- Requisitions (1)
- Invoices (1)

# Marketplace Budget Exceptions

## Approving a Budget Override Request in the Marketplace

- 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.



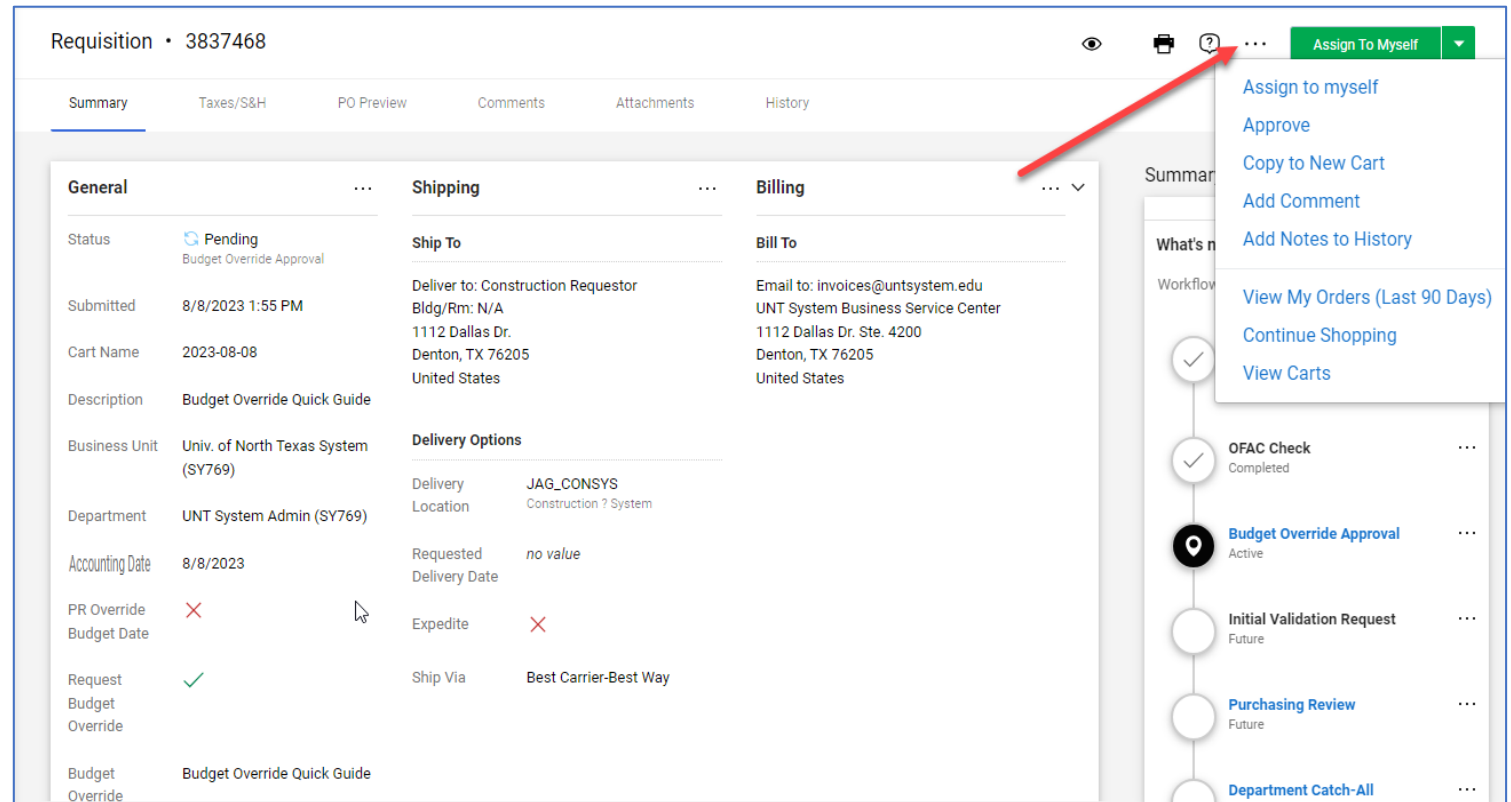
The screenshot displays the 'Approvals' page interface. At the top, there is a navigation bar with tabs for 'Requisitions 2', 'Change Requests', 'Invoices 2', 'Contracts', 'Solicitations Evaluation', 'Solicitations', 'Procurement Requests', and 'Contract Requests'. The 'Requisitions 2' tab is active. Below the navigation bar, there is a 'Your Selections' sidebar on the left with a 'Date Range' dropdown set to 'All Dates' and a 'Budget Override Approver' filter. The main content area shows 'Total Results 1' and a list of folders: 'MY PR APPROVALS 1' and 'SY BUDGET OVERRIDE APPROVAL 1'. The 'SY BUDGET OVERRIDE APPROVAL 1' folder is highlighted with a red box.

# Marketplace Budget Exceptions

## Approving a Budget Override Request in the Marketplace

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

OFAC Check Completed

Budget Override Approval Active

Initial Validation Request Future

Purchasing Review Future

Department Catch-All

# Marketplace Budget Exceptions

## Approving a Budget Override Request in the Marketplace

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

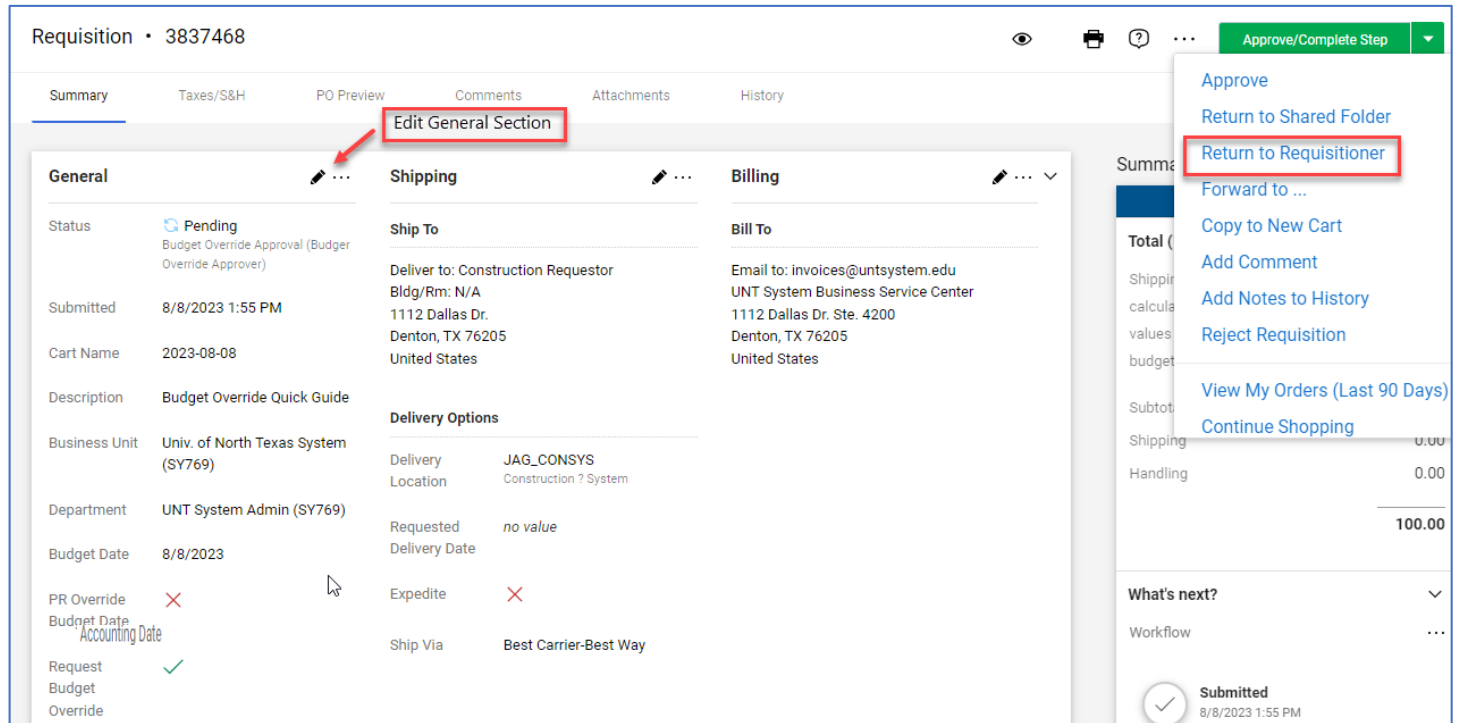


# Marketplace Budget Exceptions

## Approving a Budget Override Request in the Marketplace

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: Construction Requestor Bldg/Rm: N/A 1112 Dallas Dr. Denton, TX 76205 United States	Bill To: UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
Submitted: 8/8/2023 1:55 PM	Delivery Options: 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: X		
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

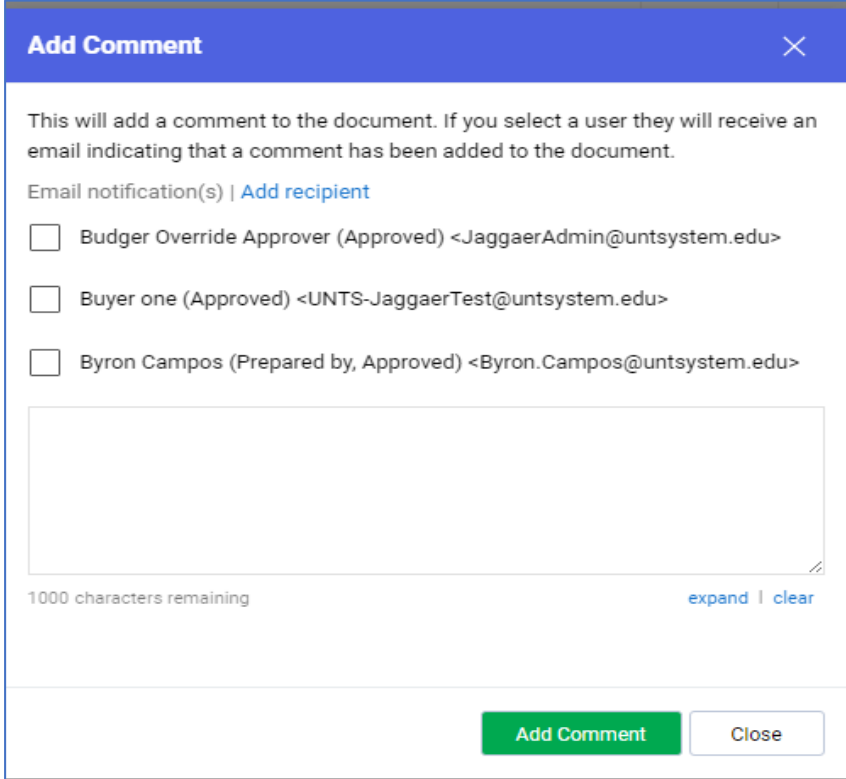
Submitted 8/8/2023 1:55 PM

# Marketplace Budget Exceptions

## Approving a Budget Override Request in the Marketplace

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**.



The screenshot shows a modal dialog box titled "Add Comment" with a close button (X) in the top right corner. The dialog contains the following text: "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." Below this is a link "Email notification(s) | [Add recipient](#)". There are three checkboxes with labels: " Budger Override Approver (Approved) <JaggaerAdmin@untsystem.edu>", " Buyer one (Approved) <UNTS-JaggaerTest@untsystem.edu>", and " Byron Campos (Prepared by, Approved) <Byron.Campos@untsystem.edu>". Below the checkboxes is a large text input area. At the bottom left of the input area, it says "1000 characters remaining". At the bottom right, there are links for "expand" and "clear". At the bottom of the dialog, there are two buttons: a green "Add Comment" button and a white "Close" button.

# Marketplace Budget Exceptions

## Approving a Budget Override Request in the Marketplace

**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 the Marketplace are not budget checked since an encumbrance exists for the PO.  
Therefore, no Override is needed in the Marketplace or EIS
- Non-PO Invoice (Created by AP)  
Override needed in the Marketplace 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 the Marketplace and EIS if budget deficit. AP completes Budget Override Request and submits for approval if not originally completed on the Payment Request.