

Job Aid: Creating a Multi-year Requisition

This example is based on a 5 year service agreement with 5 annual payments and first year's payment will be made in current fiscal year. Prior to issuing a multi-year requisition, Department \ School **must** create the applicable years' budget line in the budget tool module for the chartstring being used (currently only 4 fiscal years' budget can be created and based on this example the 4th year budget line will repeat for year 5). Due to ARC systems requirement multi-year contract payments must be itemized by line per Columbia's fiscal year.

What you need to have before you begin a multi-year requisition

1. Verify length of contract per supplier proposal or quote
2. In what fiscal years do the payments take place?
3. Determine how many fiscal years will cover the contract term
4. Verify that the natural account for the product/service (see Category Code* list on Purchasing website) matches the natural account in your selected chartstring
5. Create the necessary budget lines in the Budget Tool to accommodate the number of fiscal years required for your requisition
6. Please note that currently only 4 fiscal years' budget can be created and the 4th year budget line will repeat for all subsequent years**

*please do not copy and save this Excel file as it is regularly updated by Purchasing

** In years following the 4th fiscal year a financial Change Order will be required to update the chartstring budget year for the remaining contract term **(be sure that the budget line for the then current and remaining fiscal year(s) has been created in the budget tool)**

Step 1: Define Requisition

Complete all sections below noting the following exceptions:

1. If purchase is unable to meet the competitive bidding process, select Sole /Single Source as indicated
2. If there are multiple Category Codes, **Do Not** enter in "Define Requisition", but rather be sure to indicate the appropriate category code(s) for each line item.
3. Due date (for multi-year contracts, the due date should be entered **in each line item with the exception of the first line, which must be a fixed cost service.** **Do not** enter a due date on the "Define Requisition" page.
4. If there are multiple chart strings, this must be entered in for each line item. **Do Not** enter this information in "Define Requisition".

ARC
 Favorites Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: COLUM Columbia University
 *Requester: If10 Rivers, Laura
 Requisition Name: multi-year requisition job aid
 Sole/Single Source
 *Currency: USD
 Priority:

Line Defaults
 Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
 Vendor: 0000004788 Vendor Location: ACH-01
 Buyer: Category: 81101706 Unit of Measure: ea

Shipping Defaults
 Ship To: Due Date: Attention: Bill To Location ID:

Accounting Defaults
 Chartfields1 Details Asset Information

Location	GL Unit	Account	Dept	PC Bus Unit	Project	Activity	Initiative	Segment	Site
CU00000001	COLUM								

Continue

See exception #1 listed for Sole / Single Source above

See exception #2 listed above listed above

See exception #4 listed above for Chartfield 1

Select

2: Add Items and Service

ARC
 Favorites Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog Favorites Templates Forms Web Special Request

Select a Request Type

Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Select "Fixed Cost". This must be selected for all multi-year contracts or any contract with a start and end date such as service agreements, consultants, etc.

Step 2: Add Items and Services continues – Line Item #1



Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Note Value of Service is \$0

Type in brief description service

Type in contract start and end dates

Type in quote date

Type in full description of contract

Select send to vendor

Type in equipment quote #

Select Add or Start new Type – This is required to add the line items for the payment stream based on Columbia's budget year requirement

Fixed Cost Service

* Service Description: This is a 5 year Maintenance Service Contract

* Value of Service: 0.00000 * Currency: USD

* Category: 81101706

Vendor ID: 0000004788 [Suggest New Vendor](#)

Vendor Name: General Electric Company

Start Date: 03/01/2012 End Date: 02/28/2018

Quote Number: 99991418A Quote Date: 01/15/2013

Additional Information

5 year AssurePoint maintenance agreement for 5 annual payments dues in advance for GE Logiq9 with system ID#L9R58168, optional items included VCR, Printers and specialty probes.

Send to Vendor Show at Receipt Show at Voucher

Add Cancel Add or Start New Type

Step 2 - Add Items and Services continues - Line item #1

ARC

Favorites | Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: _____ Search

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Fixed Cost Service

* Service Description: This is a 5 year Maintenance Service Contract
* Value of Service: 0.00000 * Currency: USD
* Category: 81101706
Vendor ID: 0000004788
Vendor Name: General Electric Company
Start Date: 03/01/2012
Quote Number: 99991418A

Additional Information

5 year AssurePoint maintenance agreement for GE Logiq9 with syst...
VCR, Printers and specialty probes.

Send to Vendor Show at Receipt Show at Voucher

Add Service | Cancel | Add or Start New Type

Message

Is there no charge for line 1 service? (18036,6088)

You must set the zero price indicator to 'Yes' when the value of the service is zero.
Press 'Yes' if this is a no charge service. The system will set the item's zero price indicator to 'Yes'.
Press 'No' to go back to the previous page to change the value of service.

Yes No

Select "yes"

Step 2: Add Items and Services continues -Line item #2

ARC

Favorites | Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: _____ Search

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Select a Request Type

Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Select Special Item

Step 2: Add Items and Services continues – line item # 2 (1st year’s payments) *Be sure to enter to enter the due date, which must be the last date of the relevant fiscal year.*

The screenshot shows the 'Add Items and Services' interface. At the top, there is a navigation bar with 'ARC' logo and a '3. Review and Submit' button. Below the header, a search bar and a 'Search' button are visible. The main form area is titled 'Special Item' and contains several input fields. Callouts provide instructions for these fields: 'Type in applicable payment for current fiscal year in this example it is payment 1' points to the '*Item Description' field containing 'payment #1'; 'Type in payment amount' points to the '*Price' field containing '12500.00'; 'Type in # of payment(s) due for current fiscal' points to the '*Quantity' field containing '1'; 'Enter last day of the relevant fiscal year' points to the 'Due Date' field. Other fields include '*Category' (81101706), 'Vendor ID' (0000004788), and 'Vendor Name' (General Electric Co). At the bottom, there are buttons for 'Add Item', 'Cancel', and 'Add or Start New Type'. A callout 'Select to add line item' points to the 'Add Item' button. On the right side, there is a 'Request New Item' section with a checkbox.

Step 2: Add items and Services continues – line item # 3 (2nd year's payments)

The screenshot displays the 'Special Item' form in the ARC eProcurement system. The breadcrumb trail at the top reads: Favorites > Main Menu > eProcurement > Create Requisition. The page has two main tabs: '2. Add Items and Services' (active) and '3. Review and Submit'. Below the tabs is a search bar and a note: 'Information necessary to procure each item or service.' The form fields are as follows:

- *Item Description:** payment #2
- *Price:** 12500.00000
- *Quantity:** 1
- *Category:** 81101706
- Vendor ID:** 0000004788
- Vendor Name:** General Electric Co
- Vendor Item ID:** [empty]
- Mfg ID:** [empty]
- Manufacturer:** [empty]
- Mfg Item ID:** [empty]
- *Currency:** USD
- *Unit of Measure:** EA
- Due Date:** [empty]

Below the main form is an 'Additional Information' section with a text area and three checkboxes: 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher'. At the bottom right is a 'Request New Item' section with a checkbox 'Request New Item'. At the bottom left are three buttons: 'Add Item', 'Cancel', and 'Add or Start New Type'.

Callouts with arrows point to the following fields:

- 'Type in applicable payment details for 2nd year, in this example it is payment #2' points to the *Item Description field.
- 'Type in payment amount' points to the *Price field.
- 'Type in "ea"' points to the *Unit of Measure field.
- 'Type in # of payment(s) for current fiscal year,' points to the *Quantity field.
- 'Enter last day of the relevant fiscal year' points to the Due Date field.
- 'Select to add line item' points to the 'Add Item' button.

Step 2: Add items and Services continues – line item # 4 (3rd year's payments)

The screenshot shows the 'Special Item' form in the ARC eProcurement system. The form is titled 'Special Item' and includes the following fields and callouts:

- Item Description:** 'payment #3' (Callout: 'Type in applicable payment details for 3rd year, in this example it is payment #3')
- Price:** '12500.00000' (Callout: 'Type in payment amount')
- Quantity:** '1' (Callout: 'Type in # of payment(s) for applicable year')
- Category:** '81101706'
- Vendor ID:** '0000004788'
- Vendor Name:** 'General Electric Co'
- Vendor Item ID:** (empty)
- Mfg ID:** (empty)
- Manufacturer:** (empty)
- Mfg Item ID:** (empty)
- Currency:** 'USD'
- Unit of Measure:** 'EA'
- Due Date:** (empty) (Callout: 'Enter last day of the relevant fiscal year')

Additional information fields include 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher', all with checkboxes. The 'Request New Item' section has a checkbox for 'Request New Item'. At the bottom, there are buttons for 'Add Item', 'Cancel', and 'Add or Start New Type'. A callout 'Select to add line item' points to the 'Add Item' button.

Step 2: Add items and Services continues – line item # 5 (4th year payments)



2. Add Items and Services

3. Review and Submit

Type in applicable payment details for 4th year, in this example it is payment #4

necessary to procure each item or service.

Search:

Search

Catalog Favorites Templates Forms Web Special Request

Type in payment amount

Special Item

*Item Description:

payment #4

*Price:

12500.00000

*Currency:

USD

*Quantity:

1

*Unit of Measure:

EA

*Category:

81101706

Due Date:

Vendor ID:

0000004788

[Suggest New Vendor](#)

Vendor Name:

General Electric Co

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

Type in # of payment(s) for applicable year

Enter last day of the relevant fiscal year

Additional Information

Request New Item

Request New Item

Send to Vendor

Show at Receipt

Show at Voucher

Add Item

Cancel

Add or Start New Type

Select to add line item

Step 2: Add items and Services continues – line item # 6 (5th year payments)

The screenshot shows the '2. Add Items and Services' step in the ARC system. The interface includes a search bar, navigation tabs (Catalog, Favorites, Templates, Forms, Web, Special Request), and a 'Special Item' form. The form fields are populated with the following information:

- *Item Description: payment #5
- *Price: 12500.00000
- *Quantity: 1
- *Category: 81101706
- Vendor ID: 0000004788
- Vendor Name: General Electric Co
- *Currency: USD
- *Unit of Measure: EA
- Due Date: (empty)

Callouts provide instructions for the following fields:

- Type in applicable payment details for 5th year, in this example it payment #5** (points to *Item Description)
- Type in payment amount** (points to *Price)
- Type in # of payment(s) for applicable year** (points to *Quantity)
- Enter last day of the relevant fiscal year** (points to Due Date)

At the bottom, there are checkboxes for 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher', and buttons for 'Add Item', 'Cancel', and 'Add or Start New Type'. A callout 'Select to add the line' points to the 'Add Item' button.

Step 3: Review and Submit

ARC

Favorites | Main Menu > eProcurement > Create Requisition

Select "Review and Submit"

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | Web | Special Request

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category:

Vendor ID:

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

[Suggest New Vendor](#)

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

Step 3 Review and Submit continues



Create Requisition

2. Add Items and Services

3. Review and Submit

Expand selections for line item # 2, 3, 4, 5 & 6 to update the encumbrance for each budget year

If "amount only" is required, select here for each line and check the amount only flag

	Vendor Name	Quantity	UOM	Price	Total		
<input type="checkbox"/> 1	This is a 5 year Maintenance S	General Electric Company	<input type="text" value="1.0000"/>	Each	0.00000	0.00	
<input type="checkbox"/> 2	payment #1	General Electric Company	<input type="text" value="1.0000"/>	Each	12,500.00000	12,500.00	<input type="checkbox"/>
<input type="checkbox"/> 3	payment #2	General Electric Company	<input type="text" value="1.0000"/>	Each	12,500.00000	12,500.00	<input type="checkbox"/>
<input type="checkbox"/> 4	payment #3	General Electric Company	<input type="text" value="1.0000"/>	Each	12,500.00000	12,500.00	<input type="checkbox"/>
<input type="checkbox"/> 5	payment #4	General Electric Company	<input type="text" value="1.0000"/>	Each	12,500.00000	12,500.00	<input type="checkbox"/>
<input type="checkbox"/> 6	payment #5	General Electric Company	<input type="text" value="1.0000"/>	Each	12,500.00000	12,500.00	<input type="checkbox"/>
<input type="checkbox"/> Select All / Deselect All					Total Amount:	62,500.00 USD	

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification [More Comments](#)

By selecting "amount only", you will be able to make multiple payments from each line

Step 3: Review and Submit continues - budget information Tab (lines 2 - 3)

Create Requisition

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: COLUM Columbia University Sole/Single Source
***Requester:** lf10 Rivers, Laura ***Currency:** USD
Requisition Name: multi-year requisition job aid **Priority:** Medium

Select the Budget Information tab for lines 2 - 3

Vendor Name	Quantity	UOM	Price	Total
General Electric Company	1.0000	Each	0.00000	0.00
General Electric Company	1.0000	Each	12,500.00000	12,500.00
General Electric Company	1.0000	Each	12,500.00000	12,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 **Due Date:** **Quantity:** 1.0000 **Price:** 12,500.00000

Status: Active ***Ship To:** 100FORTWAS [Edit Onetime Address](#)
[Add Shipto Comments](#)

Attention To: Rivers, Laura

***Distribute By:** Qty **SpeedChart:** ***Liquidate by:** Amt

Accounting Lines

Line	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	CU00000001	1.0000	100.0000	12,500.00	COLUM

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 **Due Date:** **Quantity:** 1.0000 **Price:** 12,500.00000

Status: Active ***Ship To:** 100FORTWAS [Edit Onetime Address](#)
[Add Shipto Comments](#)

Attention To: Rivers, Laura

***Distribute By:** Qty **SpeedChart:** ***Liquidate by:** Amt

Accounting Lines

Line	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	CU00000001	1.0000	100.0000	12,500.00	COLUM

Step 3: Review and Submit continues - budget information Tab (lines 4 - 6)

Favorites | Main Menu > eProcurement > Create Requisition

4 [payment #3](#) General Electric Company 1.0000 Each 12,500.00000 12,500.00

Consolidate with other Reqs Override Suggested Vendor

Due Date: Quantity: 1.0000 Price: 12,500.00000

'Ship To: 100FORTWAS [Edit Onetime Address](#)
[Add Shipto Comments](#)

rs,Laura

'Distribute By: Qty SpeedChart: 'Liquidate by: Amt

Accounting Lines Customize | Find | View All | First 1 of 1 Last

Line	Dist Type	'Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	CU00000001	1.0000	100.0000	12,500.00	COLUM

5 [payment #4](#) General Electric Company 1.0000 Each 12,500.00000 12,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000 Price: 12,500.00000

Status: Active 'Ship To: 100FORTWAS [Edit Onetime Address](#)
[Add Shipto Comments](#)

Attention To: Rivers,Laura

'Distribute By: Qty SpeedChart: 'Liquidate by: Amt

Accounting Lines Customize | Find | View All | First 1 of 1 Last

Line	Dist Type	'Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	CU00000001	1.0000	100.0000	12,500.00	COLUM

6 [payment #5](#) General Electric Company 1.0000 Each 12,500.00000 12,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000 Price: 12,500.00000

Status: Active 'Ship To: 100FORTWAS [Edit Onetime Address](#)
[Add Shipto Comments](#)

Attention To: Rivers,Laura

'Distribute By: Qty SpeedChart: 'Liquidate by: Amt

Accounting Lines Customize | Find | View All | First 1 of 1 Last

Line	Dist Type	'Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	CU00000001	1.0000	100.0000	12,500.00	COLUM

Select Budget information tab on lines 4 - 6

Step 3: Review and Submit continues - Review Budget date (lines 1 - 3)

Create Requisition

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: COLUM Columbia University Sole/Single Source
Requester: lrf10 Rivers, Laura **Currency:** USD
Requisition Name: multi-year requisition job aid **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	This is a 5 year Maintenance S	General Electric Company	1.0000	Each	0.00000	0.00
2	payment #1	General Electric Company	1.0000	Each	12,500.00000	12,500.00

Override Suggested Vendor

Quantity: 1.0000 Price: 12,500.00000
 100FORTWAS
[Edit Onetime Address](#)
[Add Shipto Comments](#)

Distribute By: Qty SpeedChart: Liquidate by: Amt

Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbered Base Balance
Not Chk'd	02/06/2013	0.00 USD	0.000 USD

3 [payment #2](#) General Electric 1.0000 Each 12,500.00000 12,500.00

Override Suggested Vendor

Quantity: 1.0000 Price: 12,500.00000
 FORTWAS
[Edit Onetime Address](#)
[Add Shipto Comments](#)

Distribute By: Qty SpeedChart: Liquidate by: Amt

Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbered Base Balance
Not Chk'd	02/06/2013	0.00 USD	0.000 USD

Payment 1 is due in current fiscal year, therefore no update is required

Payments 2 is due in next fiscal year, update budget date to July 1 of the next fiscal year

Step 3: Review and Submit continues - Review Budget date (lines 4 - 6)

4 [payment #3](#) General Electric Company 1.0000 Each 12,500.00000 12,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000 Price: 12,500.00000

Status: Active *Ship To: 100FORTWAS

Attention To: Rivers,Laura

*Distribute By: Qty SpeedChart: *Liquidate by: Amt

Accounting Lines					
Budget Status	Budget Date	Pre-Encumbrance Balance		Pre-Encumbered Base Balance	
Not Chk'd	02/06/2013	0.00	USD	0.000	USD

5 [payment #4](#) General Electric Company 1.0000 Each

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000

Status: Active *Ship To: 100FORTWAS

Attention To: Rivers,Laura

*Distribute By: Qty SpeedChart: *Liquidate by: Amt

Accounting Lines					
Budget Status	Budget Date	Pre-Encumbrance Balance		Pre-Encumbered Base Balance	
Not Chk'd	02/06/2013	0.00	USD	0.000	USD

6 [payment #5](#) General Electric Company 1.0000 Each

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000

Status: Active *Ship To: 100FORTWAS

Attention To: Rivers,Laura

*Distribute By: Qty SpeedChart: *Liquidate by: Amt

Accounting Lines					
Budget Status	Budget Date	Pre-Encumbrance Balance		Pre-Encumbered Base Balance	
Not Chk'd	02/06/2013	0.00	USD	0.000	USD

[Select All / Deselect All](#) **Total Amount:** 62,500.00 USD

Update lines 4 and 5 budget dates to July 1 of each applicable fiscal year

Due to systems limitation, there can be only 4 budget years, therefore update line 6 with line 5's budget date

Step 3: Review and Submit continues - Update Budget date for line 2 & 3

Create Requisition

1. Define Requisition

Review the details of your requisition, make a

Business Unit: COLUM C

Requester: lf10

Requisition Name: multi-year requ

(by updating the budget years, the funds will not encumber until the date indicated here). Note budget date always begins on the first day of the fiscal year with exception of the current fiscal year which is always the date the requisition is created.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	This is a 5 year Maintenance S	General Electric Company	1.0000	Each	0.00000	0.00
2	payment #1	General Electric Company	1.0000	Each	12,500.00000	12,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity:
 Status: Active 'Ship To: 100FORTWAS [Edit Onetime Address](#)
 Attention To: Rivers,Laura [Add Shipto Comments](#)
 'Distribute By: Qty SpeedChart: 'Liquidate by: Amt

Since line 2 payments are for current fiscal year, no change is required

Accounting Lines

Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbered Base Balance
Not Chk'd	02/06/2013	0.00 USD	0.000 USD

3	payment # 2	General Electric Company	1.0000	Each	12,500.00000	12,500.00
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Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0
 Status: Active 'Ship To: 100FORTWAS [Edit Onetime Address](#)
 Attention To: Rivers,Laura [Add Shipto Comments](#)
 'Distribute By: Qty SpeedChart: 'Liquidate by: Amt

Here is the updated budget date based on the corresponding fiscal year

Accounting Lines

Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbered Base Balance
Not Chk'd	07/01/2013	0.00 USD	0.000 USD

Step 3: Review and Submit continues - Update Budget date for (line items 4 - 6)

(by updating the budget years, the funds will not encumber until the date indicated here). Note budget date always begins on the first day of the fiscal year with exception of the current fiscal year which is always the date the requisition is created.

Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbered Base Balance
Not Chkd	07/01/2014	0.00 USD	0.000 USD
Not Chkd	07/01/2015	0.00 USD	0.000 USD
Not Chkd	07/01/2015	0.00 USD	0.000 USD

Here are the updated budget dates based on the corresponding fiscal years

Due to system's limitation, this will be the same as line 5 and will need to be updated to the applicable fiscal year via a Change Order any time after the end of the 1st fiscal year

Select

Budget Error:

- If requisition fails budget check or if there is a budget error, it must be corrected before submitting the requisition for approval.
- A budget error means there is no budget line created in the department's budget for the applicable fiscal year. For example, if line items 2 – 6 received a budget error and based on the example listed above, department would need to create the budget lines in the budget tool for fiscal years July 1 – July 2013 (**current fiscal year**); July 1, 2013 – June 30, 2014 ; July 1, 2014 – June 30, 2015 & July 1, 2015 to June 30, 2016.
- Once the budget error is corrected, verify budget dates and perform “check budget”

Warning or Valid budget:

- A budget warning means the budget line was created with \$0.
- The requisition is ready to be submitted for approval and follow the normal process for issuing a requisition.

Budget dates:

- It is important to verify the budget date prior to submitting the requisition for approval, since the system often reverts the budget date to the date the requisition was created if any changes were made to the requisition after the budget date was updated. Changes such as but not limited to:
 - Change made on the “Define Requisition” page
 - Category code change
 - Natural account change
 - Requisition previously had a “budget error” and the budget error was corrected

Should you have any questions, please direct to the University's Finance Service Center at <http://finance.columbia.edu/content/finance-service-center>.

