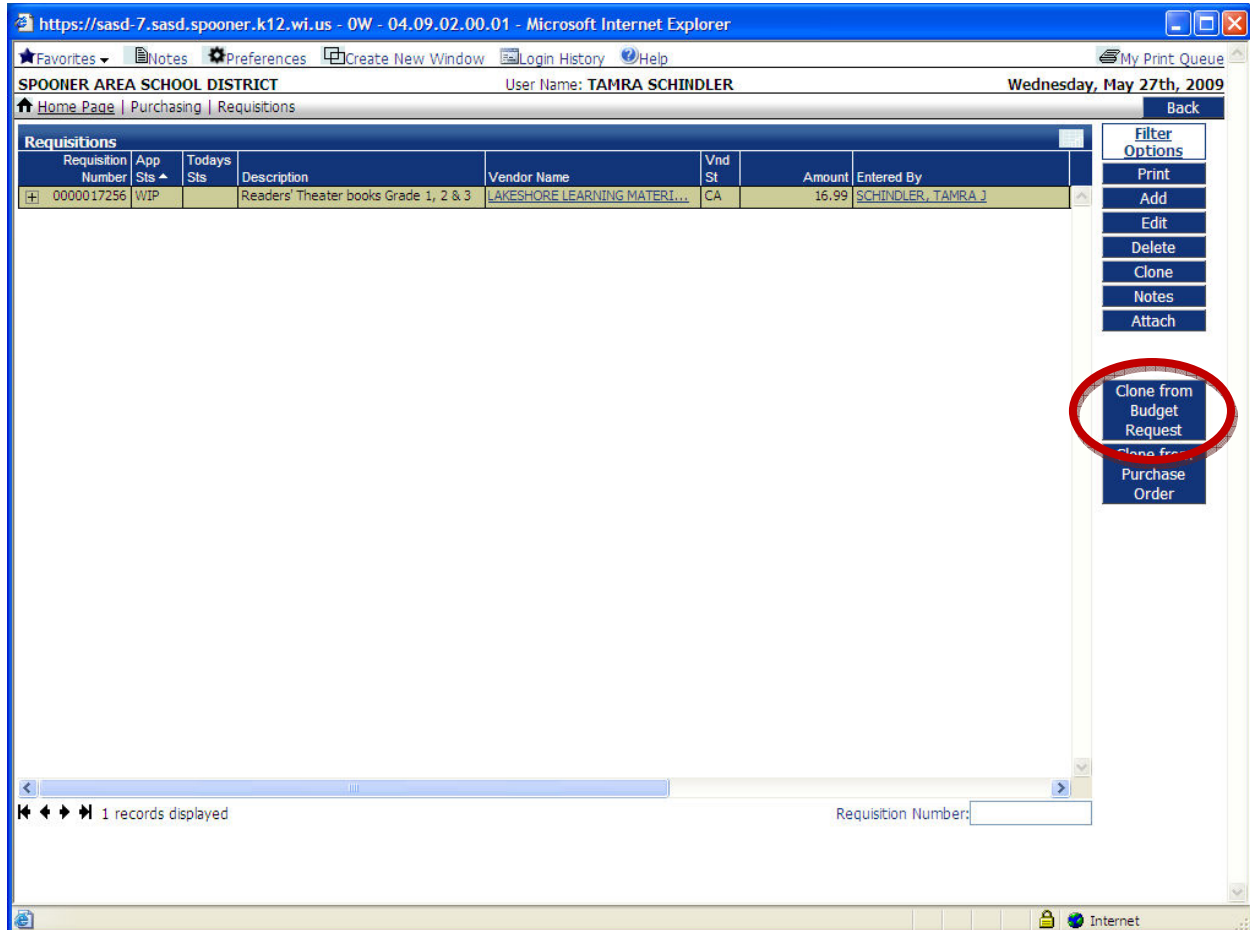


Creating Purchasing Requisitions from Budget Requisitions

Login to ERMA, Purchasing, Requisitions: (Apply the filter if you still haven't shut this off. Reminder: if you don't want the filter to continually display on these screens, click on Preferences, check the Do Not Automatically Display Browse Filter, Save.)

1. Click on Clone from Budget Request

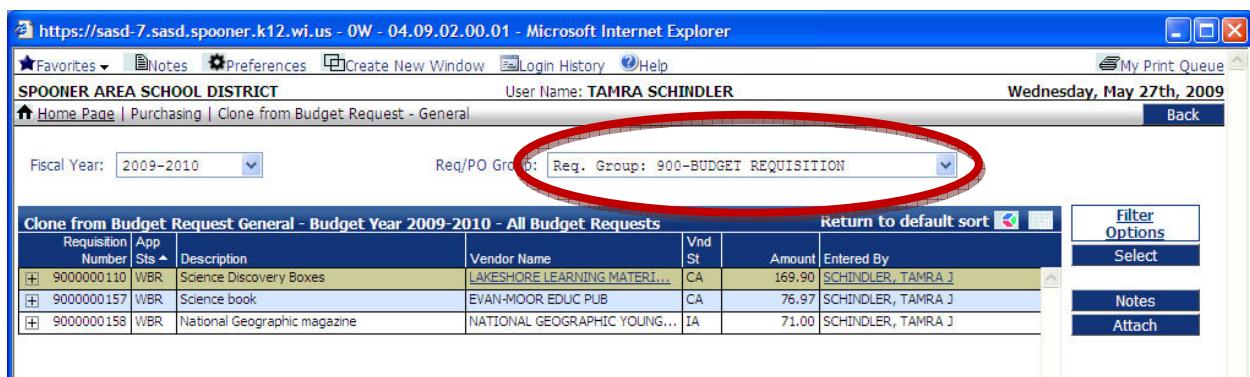


The screenshot shows the ERMA Requisitions page in a Microsoft Internet Explorer browser. The page title is "SPooner Area School District" and the user is "TAMRA SCHINDLER". The date is "Wednesday, May 27th, 2009". The page is titled "Requisitions" and shows a table with one record:

Requisition Number	App Sts	Today's Sts	Description	Vendor Name	Vnd St	Amount	Entered By
0000017256	WIP		Readers Theater books Grade 1, 2 & 3	LAKESHORE LEARNING MATERI...	CA	16.99	SCHINDLER, TAMRA J

On the right side of the page, there is a "Filter Options" menu with buttons for "Print", "Add", "Edit", "Delete", "Clone", "Notes", and "Attach". The "Clone from Budget Request" button is circled in red.

2. Change the Req/PO Group to 900-BUDGET REQUISITION (this is where you created them, kind of like a filing cabinet.) Click on the budget request you want, Select.



The screenshot shows the ERMA "Clone from Budget Request" page. The page title is "SPooner Area School District" and the user is "TAMRA SCHINDLER". The date is "Wednesday, May 27th, 2009". The page is titled "Clone from Budget Request - General". The "Fiscal Year" is set to "2009-2010" and the "Req/PO Group" is set to "900-BUDGET REQUISITION".

Below the dropdown menu, there is a table with the following data:

Requisition Number	App Sts	Description	Vendor Name	Vnd St	Amount	Entered By
9000000110	WBR	Science Discovery Boxes	LAKESHORE LEARNING MATERI...	CA	169.90	SCHINDLER, TAMRA J
9000000157	WBR	Science book	EVAN-MOOR EDUC PUB	CA	76.97	SCHINDLER, TAMRA J
9000000158	WBR	National Geographic magazine	NATIONAL GEOGRAPHIC YOUNG...	IA	71.00	SCHINDLER, TAMRA J

The "Req/PO Group" dropdown menu is circled in red.

3. Make any approved changes to the line items, Save.

The screenshot shows the 'Item Selection' page with a table of requisition line items. The table has columns for Line, Catalog Code, Description, Unit of Measure, Unit Cost, Approved Budget Quantity, Previous Requested Quantity, Current Requisition Quantity, and Quantity Remaining. Three items are listed: Line 100 (Science Discovery Boxes-Complete Set), Line 110 (set of 30 blank books), and Line 120 (Medium tuff tote). A 'Filter Options' sidebar on the right contains buttons for Save, Back, Set All to Quantity Remaining, and Reset All Requisition Quantity to Zero.

Line	Catalog Code	Description	Unit of Measure	Unit Cost	Approved Budget Quantity	Previous Requested Quantity	Current Requisition Quantity	Quantity Remaining
100	FF-880X	Science Discovery Boxes-Complete Set	3 boxset	\$149.00000	1	0	1	1
110	FF-593	set of 30 blank books	set 30	\$12.95000	1	0	1	1
120	WT-363	Medium tuff tote	1 tote	\$7.95000	1	0	1	1

4. **CHANGE THE REQUISITION GROUP TO YOUR CORRECT PURCHASING GROUP** – i.e., 100, 200, 400, Save. If you do not get this step correct your requisition will be denied and you will need to start over.

The screenshot shows the 'Requisition Master Information' page. The 'Requisition Group' dropdown menu is highlighted with a red oval and contains the text '100 - ELEMENTARY'. Other fields include 'Fiscal Year' (2009 - 2010), 'Account allocation by total requisition amount' (selected), and 'Requisition Information' section with fields for Description, Vendor, Ship To, Attention, Ship Date, Ship Via, and Project/Grant.

5. If the accounting is correct, go ahead and click on Submit for Approval. That's it. Repeat as necessary.

The screenshot shows the 'Requisition Detail Lines/Accounting' page. The 'Requisition Master Information' section displays: Requisition Number: 0000019152, Group: (100) ELEMENTARY, Fiscal Year: 2009 - 2010, Vendor: LAKESHORE LEARNING MATERIALS, and Description: Science Discovery Boxes. The 'Requisition Detail Line Items' table lists the same three items as in the first screenshot. A 'Submit For Approval' button is visible on the right.

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
100	FF-880X	Science Discovery Boxes-Complete Set	1	3 boxset	149.00000	149.00	
110	FF-593	set of 30 blank books	1	set 30	12.95000	12.95	
120	WT-363	Medium tuff tote	1	1 tote	7.95000	7.95	