

Budget Requisition Process (a.k.a. spring requests)

All Budget Requisitions must be entered by April 15th

During this process you will be submitting itemized budgeting requests for your classroom, curricular area or department to your principal or administrator. After the principal/admin reviews your requests, he/she may make on-line changes, approve or deny your budget requests. Once you receive the “Go Ahead” from your principal, you may begin the ordering process for your approved budget items by creating purchasing requisitions. The projected “Go Ahead” date will be around the first of May.

This is a tutorial of how the software works –

please address specific budgeting questions to your Principal/Admin.

******Remember - budget requisitions are not purchasing requisitions******

Budget requisitions are entered in primarily the same manner as the purchasing requisitions.

1. Log into ERMA (Employee Access.)

2. Click on Budget Management, Budget Requisitions. Make sure your Filter Options are set to *All Budget Requests” and any other parameters you wish; click Apply Filter. (Note: if you do not wish the filter screen to appear on web applications, once the filter has been applied, click on Preferences in the menu line and check “Do Not Automatically Display Browse Filter.” – this can be done for any Skyward web-based application with filter browsers.)

3. ***Change the Req/PO Group to **900-Budget Requisitions**, click Add.

0 - 04.09.06.02.02 - Windows Internet Explorer

SPOONER AREA SCHOOL DISTRICT User Name: VICKI ANDERSON Friday, March 5th, 2010

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Fiscal Year: 2010-2011 Req/PO Group: Req. Group: 900-BUDGET REQUISITION

Budget Request General - Budget Year 2010-2011 - Annual Budget Requests with Approved Lines

Requisition Number	App Sts	Description	Vendor Name	Vnd St	Amount	R/P	Entered By
No records available							

Filter Options Add Notes Attach

4. The fiscal year should default to 2010-2011, if not change it. Enter the Brief Description of the item(s) you wish to request (3 to 4 words max,) Vendor and Ship To information. If you will be ordering the same thing every year, by checking Annual Budget Request you will be able to save time next year during this process by cloning (copying) your Annual Budget Requests forward. Check if you want to then click Save.

Budget Requisition Master Information | Budget Requisition Detail Lines/Accounting

Budget Requisition Master Information

Budget Requisition Setup Information

Requisition Group: 900 - BUDGET REQUISITION Save Back

Fiscal Year: 2010 - 2011 July 1, 2010 - June 30, 2011

Budget Requisition Information

* Description: CLASSROOM SUPPLIES (BRIEF DESCRIPTION 3 TO 4 WORDS MAX)

Vendor: ECONOMART 700 S RIVER ST SPOONER WI 54801

Ship To: SPOONER AREA SCHOOL DISTRICT 801 CTY HWY A SPOONER WI 54801

Project/Grant:

Annual Budget Request

Asterisk (*) denotes a required field

5. Enter your line item specifics just like you would a purchasing requisition. Click Save.

Budget Requisition Master Information | Budget Requisition Detail Lines/Accounting

Budget Requisition Detail Lines/Accounting

Budget Requisition Master Information

Requisition Number: **0000000900** Accounting: **Account allocation by total requisition amount.**
 Group: **(900) BUDGET REQUISITION** Amount: **\$0.00**
 Fiscal Year: **2010 - 2011** Ship To: **SPOONER AREA SCHOOL DISTRICT**
 Vendor: **ECONOMART** Description: **CLASSROOM SUPPLIES**
700 S RIVER ST
SPOONER WI 54801
 Annual Budget: **No**

Budget Requisition Detail Lines

Line Number: **100** **Save**
 Line Type: Merchandise **Back**
 Narrative
 Catalog: **1234567**
 * Quantity: **2**
 Unit of Measure: **DOZEN**
 * Unit Cost: **1.50000**
 Total Amount: **3.00**
 * Description: **PENCILS**

Asterisk (*) denotes a required field

6. Continue to add as many line items as you wish by clicking on Add. Be sure to add a line item for shipping and handling for at least 10% of your order total.

7. When you are done entering all line items, you need to select the account number for your requests by clicking on Add Requisition Accounts. *You cannot skip this step.*****

Budget Requisition Master Information | Budget Requisition Detail Lines/Accounting

Budget Requisition Detail Lines/Accounting

Budget Requisition Master Information

Requisition Number: **0000000900** Accounting: **Account allocation by total requisition amount.** [Edit Master](#)
 Group: **(900) BUDGET REQUISITION** Amount: **\$3.00** [Notes](#)
 Fiscal Year: **2010 - 2011** Ship To: **SPOONER AREA SCHOOL DISTRICT** [Attachments](#)
 Vendor: **ECONOMART** Description: **CLASSROOM SUPPLIES**
700 S RIVER ST
SPOONER WI 54801
 Annual Budget: **No**

Budget Requisition Detail Line Items

Line	Catalog Code	Description	Unit of Measure	Quantity	Unit Cost	Total Cost
100	1234567	PENCILS	DOZEN	2	\$1.50000	\$3.00

Submit For Approval
Save and Finish Later
Back

Add
Edit
Delete
Add Requisition Accounts

8. Select the appropriate account number then click on Save Account Distribution.

Available Accounts							Funds Available		Selected
Fnd	T	Loc	Obj	Func	Prj				
10	E	800	411	219000	567		\$0.00	<input type="checkbox"/>	
10	E	800	411	221300	365		\$0.00	<input type="checkbox"/>	
10	E	800	411	230000	000		\$0.00	<input checked="" type="checkbox"/>	
10	E	800	411	231400	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	240000	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	248100	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	248200	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	248400	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	248800	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	251000	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	252000	000		\$0.00	<input type="checkbox"/>	
10	E	800	411	253200	000		\$0.00	<input type="checkbox"/>	

100 records displayed

Account Number:

Quick Key:

Total Amount to Distribute: \$3.00 100.00%

Total Distributed: \$3.00 100.00%

Amount Remaining: \$0.00 0.00%

Selected Accounts

Account Number	Amount	Percent
10 E 800 411 230000 000	3.00	100.00

[Remove](#) [Remove All](#)

Save Account Distrib

Back

9. This budget request should be complete at this time – click Submit for Approval to finish. If not, and you wish to make changes to line items, click on that option or update account number. If you would like to save it as a Work In Progress and finish it later, click on that option. (I have selected View Requisition Detail Lines in this view.)

[Budget Requisition Master Information](#) | [Budget Requisition Detail Lines/Accounting](#)

Budget Requisition Detail Lines/Accounting

Budget Requisition Master Information

Requestion Number: 0000000900 Accounting: Account allocation by total requisition amount. [Edit Master](#)

Group: (900) BUDGET REQUISITION Amount: \$3.00 [Notes](#)

Fiscal Year: 2010 - 2011 Ship To: SPOONER AREA SCHOOL DISTRICT [Attachments](#)

Vendor: ECONOMART Description: CLASSROOM SUPPLIES

700 S RIVER ST

SPOONER WI 54801

Annual Budget: No

Submit For Approval

Save and Finish Later

Back

Budget Requisition Detail Line Items

Line	Catalog Code	Description	Unit of Measure	Quantity	Unit Cost	Total Cost
100	1234567	PENCILS	DOZEN	2	\$1.50000	\$3.00

[Expand All](#) [Collapse All](#) [Show Details In New Window](#) [Modify Details](#) (displaying 2 of 2)

[Approval/Denial History](#)

No approval/denial history exists.

[Change History](#)

No change history exists.

Add

Edit

Delete

View Requisition Accounts

10. Repeat this process for as many budget requisitions as you need. **One budget requisition should be created for each Vendor.** You must know a minimum of 3 things for each requisition – the vendor, the detail items and costs of each. You will receive additional instructions when this process is complete and you need to create purchasing requisitions.