	FRONTLINE PROCEDURES Pasadena ISD	ENTRY POINT: Create Requisitions
DATE DEVELOPED: 07/19/2021	REVISED DATE:	
SUBJECT: Create Traditional Requisitions		

Create Traditional Requisitions

To purchase items using Frontline ERP, you must create and submit requisitions. These requisitions are approved by approvers and analyzers so that they can be posted and invoiced. This document describes how to create and submit these requisitions:

- Traditional Requisitions

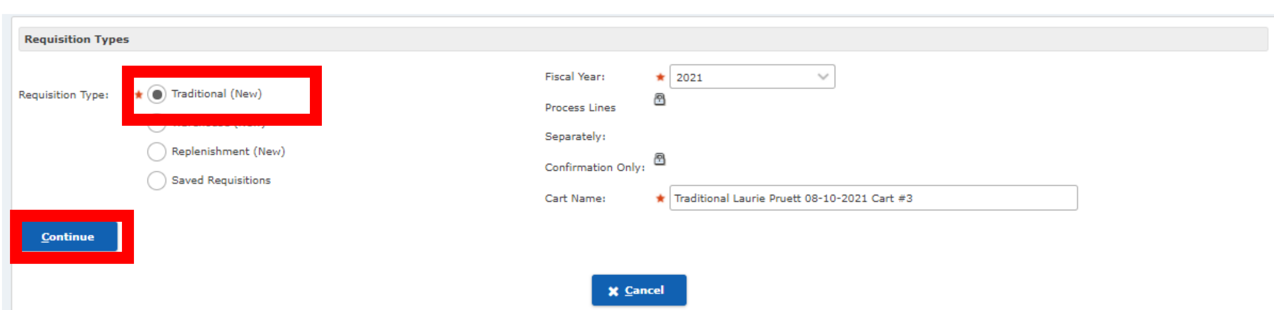
The requisitions available depend upon your level of access and the configuration choices made by your district. The options available in the various requisition types are configurable by your district, via the Requisition Options entry point.

Videos

- **Requisition Types (1:59)**
- **Creating Requisitions (7:55)**

Creating Traditional Requisitions

- Click the **Create Requisitions** entry point. The Select Traditional (New) tab.



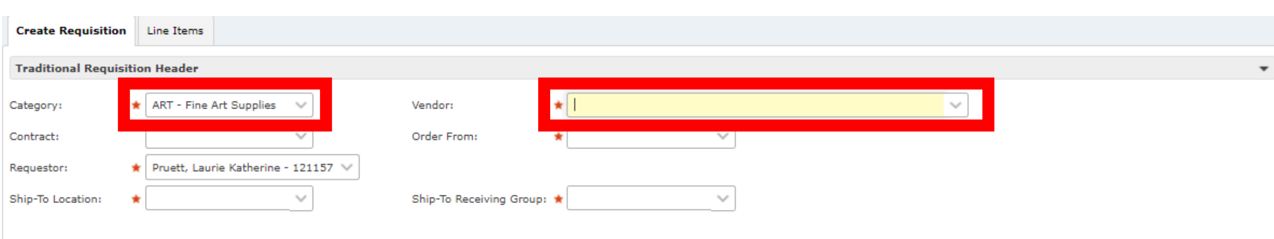
- In the Requisition Type field, *Traditional (New)* is the default selection. Leave Traditional (New) selected.

Select *Traditional (Saved)* if you have already created the requisition and saved it as incomplete in the Line Items tab, and select the saved requisition from the Cart Name drop-down list. Saved Carts do encumber funds if saved and will automatically delete after 7 days

- The Fiscal Year defaults to the current year. You can change the year, if necessary.
- The Cart Name field is populated with a default name comprised of these elements:
  - The name of the employee currently logged in
  - Today's date
  - The next cart number
- You can change this information, if necessary.

Cart Names are stored in numbered increments. If you change the Cart Name, the next requisition will default in using the same number as the number you change. For instance, if you change the Cart Name from *Traditional Rita Velazquez 10-24-2013 Cart #1* to *Office Chairs*, the next requisition you create will default in the same Cart Number you changed: Traditional Rita Velazquez 10-24-2013 Cart #1.

- Because the line items you add to the shopping cart can be approved individually, one item may be approved but not the other, or one item may be approved before the other. The purchase order won't be created until all lines are approved or voided by the approver.
- Click the Continue Button. The Create Requisition tab appears.
- The Category and Vendor fields are related.



- If you select a procurement Category first, the vendor drop-down list is populated with those vendors that are awarded in the category you selected. Choose your categories consistently, as they are used districtwide in analysis of spend and if PISD is following procurement laws.

- If you select a Vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.

The Contract drop-down list is populated with preferred contracts.

- Select a Contract. Some categories may have contracts tied to them. If this is the case, the Contract field will be populated with the contract name.

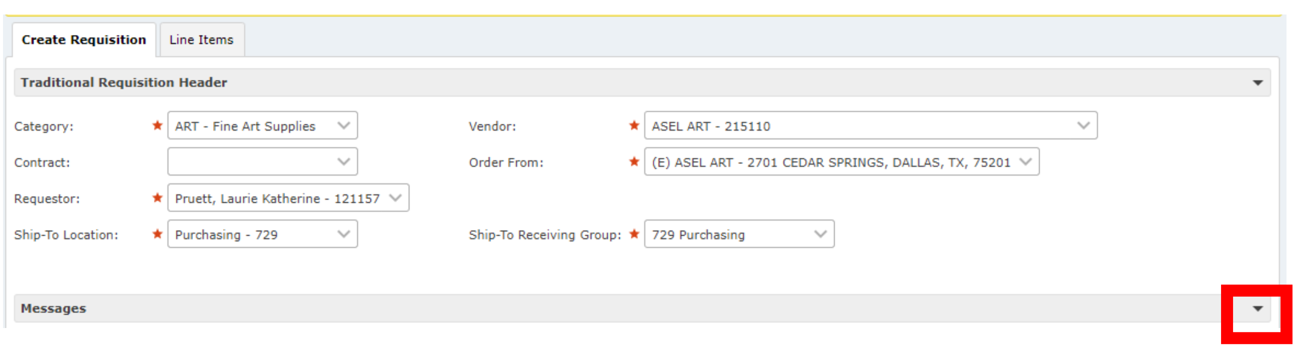
- Select Order From the drop-down list if it is not already populated. Order From with *(P)* prior to the address indicates a paper Purchase Order will be printed. Order From with *(E)* prior to the address indicates the Purchase Order will be emailed to the Vendor. (eP) denotes electronic procurement or punchout.

- The Requestor field defaults to your name.

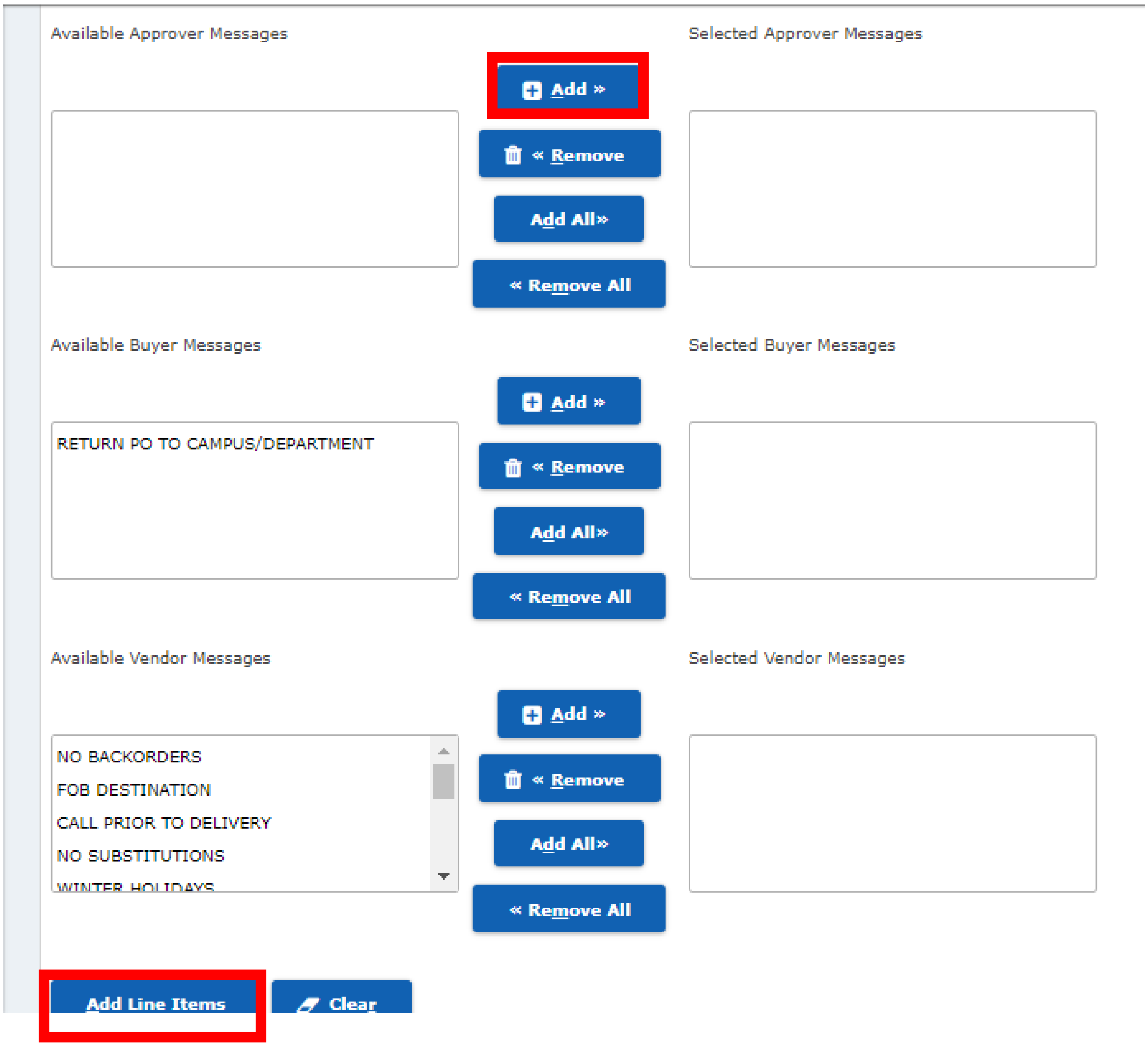
- Select the Ship-To Location from the drop-down list.

- Select the Ship-To Receiving Group. Available selections in the drop-down list are based on your selection in the Ship-To location field. These include Technology when ordering items that need to be inventoried or configured and textbooks.

- Click the  on the Messages panel to expand the Messages panel.



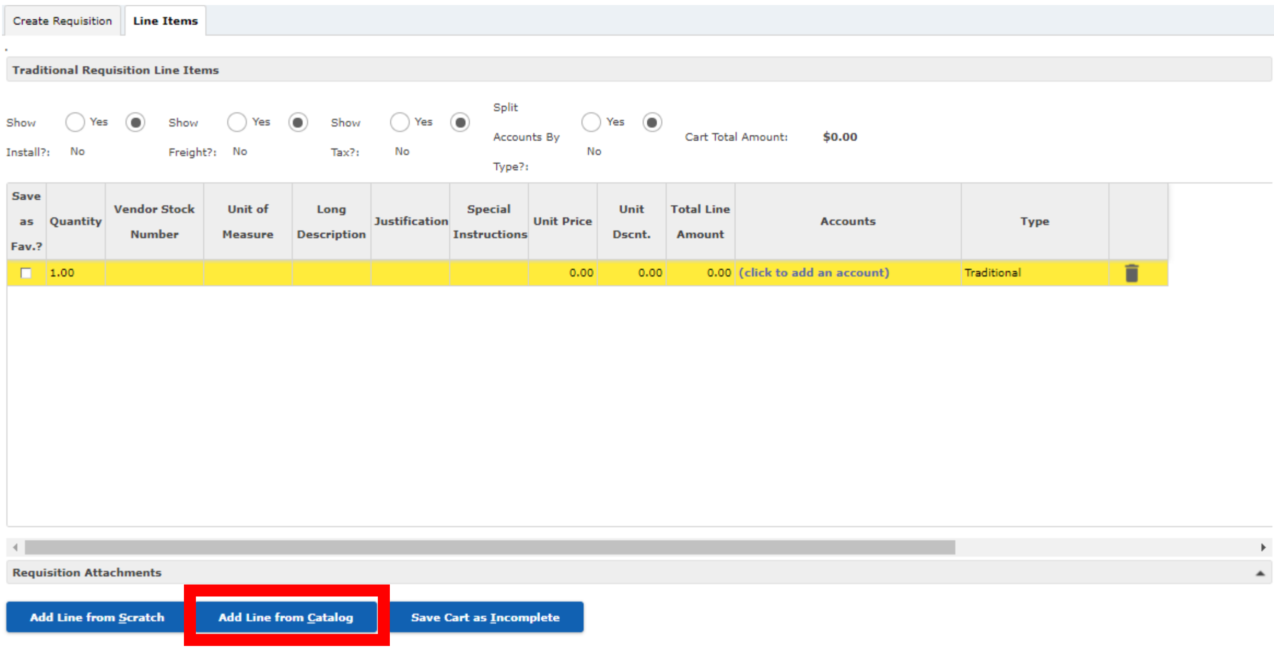
	FRONTLINE PROCEDURES Pasadena ISD	ENTRY POINT: Create Requisitions
DATE DEVELOPED: 07/19/2021	REVISED DATE:	
SUBJECT:	**Create Traditional Requisitions**	



- To include a message to Approvers, Buyers, or Vendors, highlight to select the appropriate message in the respective field and click the Add button.

Available messages are created and managed by Purchasing in the Maintain Requisition Options entry point. Please contact Purchasing to add specific messages.

- Click the Add Line Items button to view the Line Items tab.



Tip: Use the Add Line from Catalog button to add a line item from the catalog (Amazon only), from a list of items you have saved as favorited items, or from a list of items you have added in the past.

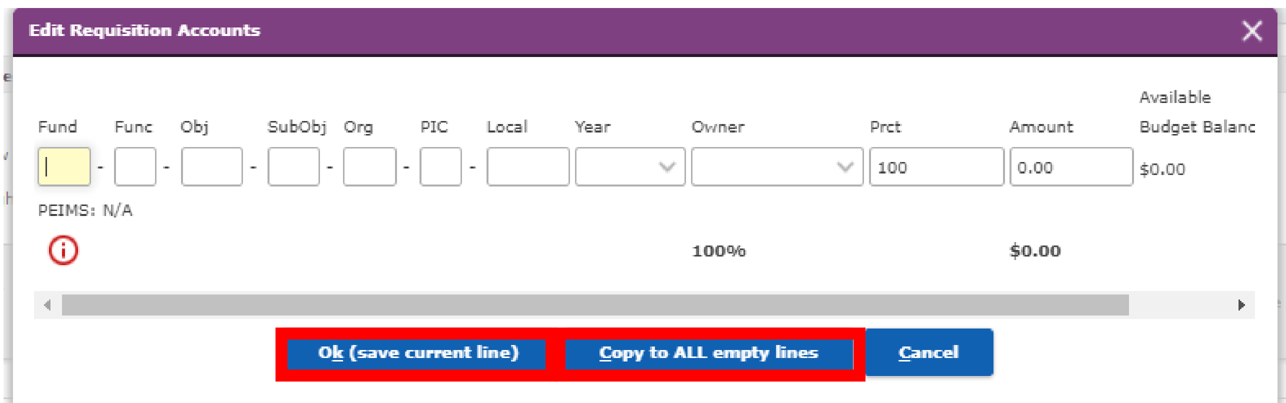
- Installation and Freight charges are added as a separate line item. Please do not add installation and freight for an item in addition to the cost of the item.
- Use the information in the following table to configure the table in the Line Items tab.

Click inside the cells under the relevant columns to enter information. The Total Line Amount cell cannot be edited, but is altered by what you enter in the Unit Price and Unit Discount fields, if they are selected.

Column	Action
Save As Fav?	Select the check box in this column to save that line item as a favorite. The line item is added to the My Favorites tab when you click the Submit button. The values maintained in the My Favorites tab are the ones captured at the time they are added. Some of these values, such as Unit Price, may have changed after the item was added to favorites. When you need to add that item later, click the Add Line From Catalog button to access the Favorited Items tab.
Quantity	Enter the number of items you want to purchase.
Item Number	Enter the item's number. Entering an item number that matches the item number used in the catalog populates all of the information for the line item except for the account.
Unit of Measure	Select how the items are grouped from the drop-down list. When adding a freight line use the UOM for Freight.
Long Description	Enter a long description, 1000 characters maximum.
Justification	Enter an explanation for the purchase. The approver sees this explanation during the approval process. Explanations do not appear on the purchase order. This is optional.
Special Instructions	Special Instructions print on the Purchase Order beneath their corresponding line items.
Unit Price	Enter a price per unit.

Column	Action
Unit Dscnt.	Enter a unit discount. Unit discount can be entered with a percent sign (%) which will calculate the amount of discount based on the Unit Price, or you can add the dollar amount of the discount.

- Click to add an account link to include an account from which to draw funds to pay for the item. The Edit Accounts box is displayed, as shown in the following illustration.



- Enter the account number or any part of the budget and SCROLL TO THE RIGHT and click the icon to select one from the Account Numbers tab.

Tip: Complete any of the boxes and click the icon to filter the search.

- Check the Year.
- Check the Owner.
- The Percent (Prct) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.

To delete an account, click the icon.

- Optional. Click the + icon to add another account number for the requisition. Repeat steps above and ensure that the Percentage fields for all accounts adds up to 100 %.

- Click the Ok (save current line) button to apply the account number only to the line item selected, or click the Copy to ALL empty lines button to apply the account number to all the line items in the requisition which do not currently have accounts assigned to them. The account is added into the Accounts column in the Line Items tab.

- Use the following information to add line items:

    - Use the Add Line from Scratch button to add a new, blank line item.
    - Use the Add Line from Catalog button to add a line with previously defined information.
    -

Clicking the Add Line from Catalog button opens the Purchasing Catalog tabs, which you can use to select catalog items, items you have saved as a favorite, and items you have added before.

Click the Save Cart as Incomplete button to save the requisition and complete it at another time. When you want to continue creating the requisition, select *Traditional (Saved)* from the Select Requisition type tab, and choose the requisition you created and saved from the drop-down list. Saved Carts do encumber funds at the time they are saved for 7 days. If the Saved Cart exceeds the allotted time, then the requisition is deleted and the funds added back to the account number(s) that were in the cart.

- To add attachments click the down arrow on Requisition Attachments and then click the

- Upload button to browse for your saved attachment. You can add a description to the attachment. Select the drop down to choose the Attachment Type. Vendor will be sent with the PO to the vendor. Internal are for internal documentation. Quotes, Contracts, and Proposals are examples of documents that need to be sent to the vendor. Emails, contract processing approval forms, and department memos are examples of internal attachments.

Click the icon to view the attachment in a pop-up window.

Click the icon to delete the attachment.

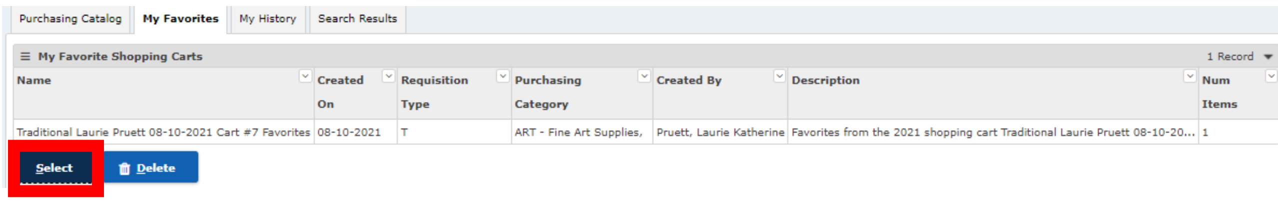
- Click the Submit button. A message appears, telling you that the requisition was successfully created, and asking if you would like to create another requisition.

If a selected account does not have sufficient budget for a line item, a message appears to inform you of the budget shortfall.

	FRONTLINE PROCEDURES Pasadena ISD	ENTRY POINT: Create Requisitions
DATE DEVELOPED: 07/19/2021	REVISED DATE:	
SUBJECT: Create Traditional Requisitions		

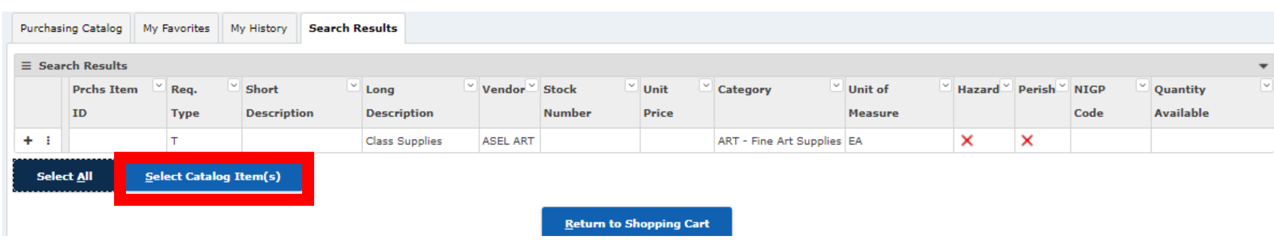
Adding a Line from the My Favorites and My History

- On the Line Items tab, click the Add Line from Catalog button.



When you enter line items, you have the option of saving them as favorites by selecting the Save as Fav? field. To select the items that have been saved as favorites:

- Click the My Favorites tab to bring it forward.
- Highlight to select the item from the My Favorite Shopping Carts list, and click the Select button. The Search Results tab appears.



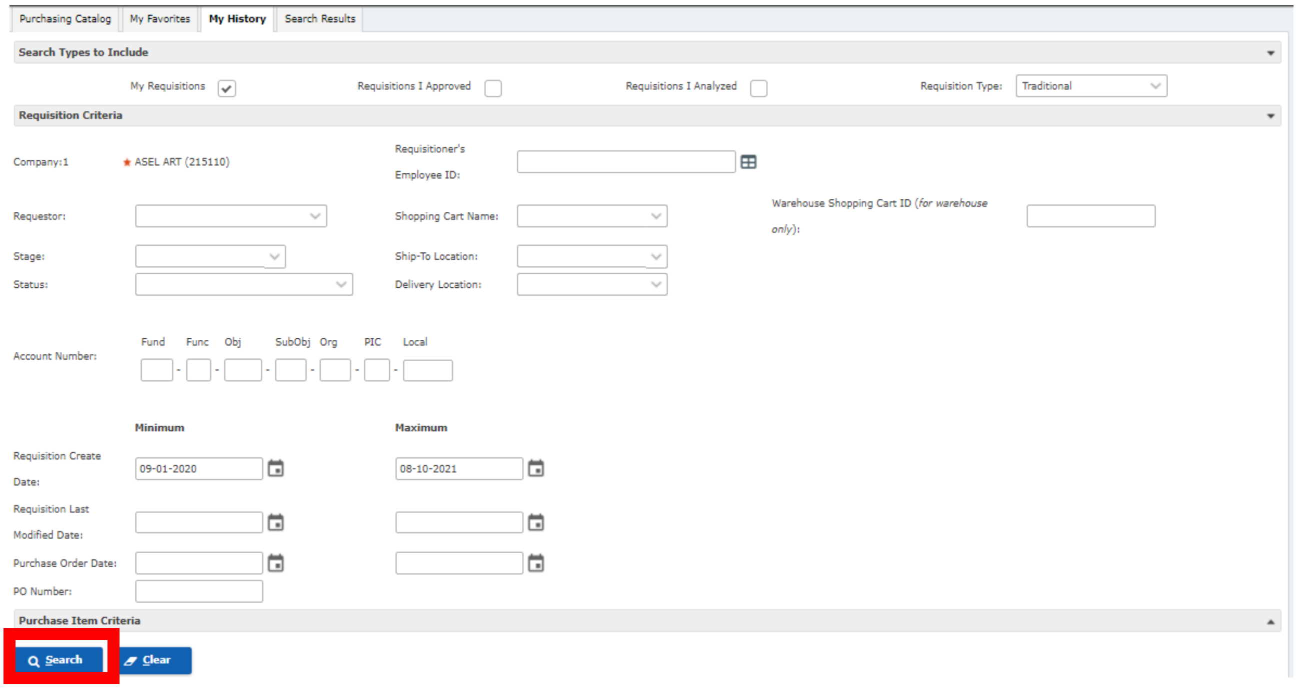
- Highlight to select the appropriate item, and click the Select Catalog Item(s) button. The Line Items tab appears with the item you selected added to the list.

Adding Items from the My History tab

Every requisition you have submitted in Frontline is available via the My History tab. To search for and select items that have been added before:

- Click the My History tab to bring it forward.

SUBJECT: Create Traditional Requisitions



- In the Search Types to Include panel, select at least one of the following options:
    - My Requisitions. Select to search for requisitions that you created.
- In the Requisition Criteria panel, enter information into at least one of these fields:

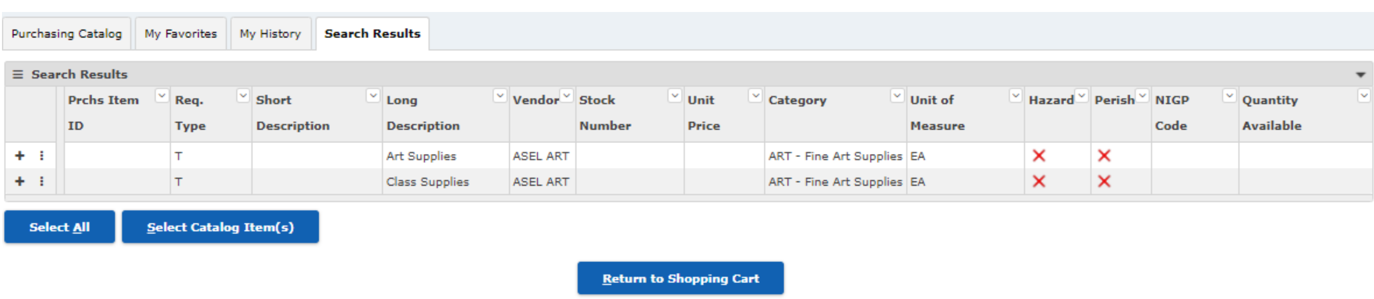
Field	Action
Requestor	Select your name from the drop-down list.
Requisition Create Date (Minimum column)	Under the Minimum column, enter a date on or after which the requisition(s) for which you are searching were created. Enter a date in the Maximum column to search for requisitions that were created within a timeframe.
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.

- To narrow your search results, enter information into any of these fields:

Field	Action
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Enter the account number that was used to pay for the requisition for which you are searching.

Requisition Create Date (Maximum column)	Enter the date on or after which the requisition was created. If you entered a date in the Minimum column, you can search for a requisition that was created within a timeframe by entering a date in this field.
Requisition Last Modified Date	Enter a date on or after which the requisition was last modified. Enter a date in the Maximum column to search for a requisition that was last modified within a timeframe.
Purchase Order Date	Enter the purchase order date for the requisition for which you are searching. Enter a date in the Maximum column to search for a requisition's purchase order date within a timeframe.
Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Description Keywords	Enter words that would match the description of the items on the requisition.

- Click the Search button. The results of your search are displayed on the Search Results tab.



- Highlight to select the appropriate item, and continue shopping.