



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: **Create Warehouse Requisitions**

Create Warehouse Requisitions

District personnel use the Create Requisitions entry point to requisition items stored in district warehouses. Once submitted, warehouse requisitions can be viewed and maintained through the Requisition Search entry point.

For information about creating warehouse replenishment requisitions, see Working with Warehouse Replenishment Requisitions.

Districts can set up their warehouse requisition process so that requisitions are automatically approved as soon as they are created. This option is set in the Maintain Requisition Options entry point. If you have questions about the warehouse requisition approval process used at your district, contact your Frontline ERP System Administrator.

Creating a Warehouse Requisition

- Access the Create Requisitions entry point to view the Select Requisition Type tab.

The screenshot shows the 'Requisition Types' form. The 'Requisition Type' field has four radio button options: 'Traditional (New)', 'Warehouse (New)', 'Replenishment (New)', and 'Saved Requisitions'. The 'Warehouse (New)' option is selected and highlighted with a red box. Other fields include 'Fiscal Year' (2021), 'Process Lines', 'Separately', 'Confirmation Only', and 'Cart Name' (Warehouse Laurie Pruett 08-11-2021 Cart #1). There are 'Continue' and 'Cancel' buttons at the bottom.

- In the Requisition Type field, select *Warehouse (New)*.



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: Create Warehouse Requisitions

If you have already created the requisition and saved it as incomplete on the Line Items tab, select Saved Carts and then select *Warehouse (Saved)*. Next, select the saved requisition from the Cart Name drop-down list.

- Change the Fiscal Year if necessary or leave it as the default year.

The Fiscal Years available for selection are associated with your security role in the Maintain Fiscal Year Security Role Business Operation entry point.

The Process Lines Separately option is not used with warehouse requisitions at this time.

The Confirmation Only option is not used with warehouse requisitions at this time

- In the Cart Name field, the following information appears by default:
 - Warehouse
 - Name of employee 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 defaults to the same number as the number you change. For instance, if you change the Cart Name from *Andrew 07-29-2016 Cart #4* to *Office Chairs*, the next requisition you create will be *Andrew 07-29-2016 Cart #4*.

- Click the button. The Create Requisition tab appears.



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: Create Warehouse Requisitions

The screenshot shows a web form titled "Requisition Types". On the left, under "Requisition Type:", there are four radio button options: "Traditional (New)", "Warehouse (New)", "Replenishment (New)", and "Saved Requisitions". The "Warehouse (New)" option is selected and highlighted with a yellow box. Below these options is a blue "Continue" button with a red border. On the right side of the form, there are several fields: "Fiscal Year:" with a dropdown menu set to "2021"; "Process Lines:" with a plus icon; "Separately:" with a plus icon; "Confirmation Only:" with a plus icon; and "Cart Name:" with a text input field containing "Warehouse Laurie Pruett 08-11-2021 Cart #1". At the bottom right, there is a blue "Cancel" button with a close icon.

- The Requestor field defaults to your name. You can select another one from the drop-down list, if necessary.

The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.

Requestors you support are defined in the Maintain Requisition Support Hierarchy entry point. You can also view who you support and who supports you using the View My Requisition Support entry point.

- If your district requires you to enter a Needed By date, enter the date the warehouse items are needed in the Needed By field. This date can be no earlier than three calendar days after the current date. For example, if today is September 15, the earliest date you can enter is September 18.

Requisitioner Specifies Needed-By Date in Maintain Requisition Options determines whether this option appears on the tab. The *Requisition - Receipt Date Required* business rule determines whether the Needed By Date field is required.

- In the Deliver or Pick Up at the Warehouse field, you have the following options:
 - Deliver. To have the warehouse item delivered, select the Deliver option. In the Delivery Location field, select the location for where you want the item delivered. Select the Delivery Receiving Group for the item.



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021


REVISED DATE:

SUBJECT: Create Warehouse Requisitions

- Pick Up At Warehouse. If you intend to pick the item up at the warehouse, select Pick Up At Warehouse. In the Delivery Location field, select the warehouse location where you will pick up the item. Select the Delivery Receiving Group for the item.

The Delivery Locations available for selection are determined by the locations associated with your position and how your district has configured locations in the Maintain Receiving Locations entry point.

Delivery Receiving Groups are associated with Delivery Locations in the Maintain Receiving Locations entry point.

- Optional. If your district is using the approval workflow with warehouse requisitions and you would like to add a message from a set list of messages to your requisition, click the  icon to open the Messages panel and select the messages to include with the requisition.

You cannot edit these messages. For editable messages, use the Justification field in the Line Items tab.

Whether your district uses the approval workflow with warehouse requisitions is set in the Maintain Requisition Options entry point.

- Click the  button. The Line Items tab appears with a line for entering your requisition.



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: Create Warehouse Requisitions

Create Requisition Line Items

Warehouse Requisition Header

Requestor:

Deliver or Pick up at the Warehouse: Deliver Pick up At Warehouse

Delivery Location: Delivery Receiving Group:

Messages

Add Line Items

- Click Add Line from Catalog

Warehouse Requisition Line Items

Cart Total Amount: \$0.00

Save as Fav.?	Deliver Together	Quantity	Qty Available	Purchase Item Number	Purchasing Category	Unit of Measure	Long Description	Justification	Back Order Allowed	Special Instructions	Unit Price	Unit Dscnt.	Total Line Amount	Accounts	Type
<input type="checkbox"/>	<input type="checkbox"/>	1.00							<input type="checkbox"/>		0.00	0.00	0.00	(click to add an account)	Warehouse

Requisition Attachments

Add Line from Scratch **Add Line from Catalog** **Save Cart as Incomplete**

Submit **Return** **Cancel Shopping Cart**

- Purchasing Category: Scroll down to WHSE and pick category
- Click "Search"

Purchasing Catalog My Favorites My History Search Results

Purchasing Catalog Criteria

Purchasing Category:

Description Contains:

Search



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: **Create Warehouse Requisitions**

- Choose items you wish to order and check quantity available. You can pick more than one at a time.
- Click Select Catalog Items

Prchs Item ID	Req. Type	Short Description	Long Description	Unit Price	Category	Unit of Measure	Hazard	Perish	NIGP Code	Quantity Available	Image
3502345	W	SHORTS,2XL,BLK W WHT SCREEN	SHORTS,2XL,BLK W WHT SCREEN	.00	WHSE - Athletics	DZ	X	X		0	
3502300	W	SHIRT, GYM ADULT,X-SM HTHER	SHIRT, GYM ADULT,X-SM HTHER	.00	WHSE - Athletics	DZ	X	X		0	
3502355	W	SHORTS,3XL,BLK W WHT SCREEN	SHORTS,3XL,BLK W WHT SCREEN	.00	WHSE - Athletics	DZ	X	X		104	
3502295	W	SHORTS,XSM,BLK W WHT SCREEN	SHORTS,XSM,BLK W WHT SCREEN	.00	WHSE - Athletics	DZ	X	X		28	
3502350	W	SHIRT, GYM ADULT, 2XL HTHER	SHIRT, GYM ADULT, 2XL HTHER	.00	WHSE - Athletics	DZ	X	X		52	
3502360	W	SHIRT, GYM ADULT, 3XL HTHER	SHIRT, GYM ADULT, 3XL HTHER	.00	WHSE - Athletics	DZ	X	X		129	

- Click to Add an Account
- Enter Quantity

Quantity	Purchase Item Number	Purchasing Category	Unit of Measure	Long Description	Justification	Back Order Allowed	Special Instructions	Unit Price	Unit Dscnt.	Total Line Amount	Accounts	Type
10	3502345	WHSE - Athle DZ		SHORTS,2XL,		<input checked="" type="checkbox"/>		0.00	0.00	0.00	(click to add an account)	Warehouse
1	3502300	WHSE - Athle DZ		SHIRT, GYM A		<input checked="" type="checkbox"/>		0.00	0.00	0.00	(click to add an account)	Warehouse
1	3502295	WHSE - Athle DZ		SHORTS,XSM,		<input checked="" type="checkbox"/>		0.00	0.00	0.00	(click to add an account)	Warehouse

- Enter account number or scroll over, enter "Owner" (location) and click search magnifying glass icon
- Choose budget code
- Click select
- Click Ok to save current line only



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: Create Warehouse Requisitions

OR

- Click Copy to ALL empty lines to use the same account for all items

The following fields are populated with information saved for the item in the Maintain Purchasing Catalog Item entry point and cannot be changed: Purchasing Category, Unit of Measure, Short Description, and Unit Price.

- The default state of the Back Order Allowed box depends on information saved for the item in the Maintain Purchasing Catalog Item entry point. Whether you can change the selection in the Back Order Allowed box depends on how the item is configured in the Maintain Purchasing Catalog Item entry point.

The price displayed in the Unit Price field is determined by information saved for the item in the Maintain Purchasing Catalog Item entry point and cannot be changed. The Unit Discount fields is not used with warehouse requisitions. The amount displayed in the Total Line Amount field is calculated based on your entry in the Quantity field and the saved pricing details for the item.

Districts can choose not to use Back Order Allowed.

- Optional. Enter Special Instructions for this line item.



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: Create Warehouse Requisitions

- In the Accounts column, click the (Click to add an account) link to display the Edit Requisition Accounts box and select one or more General Ledger accounts to use for the requisitions. When you are finished entering account information, click the button to close the Edit Requisition Accounts box.

The Type field defaults to *Warehouse* to indicate this is a warehouse requisition.

Any General Ledger account you select must be valid for the Requisition - Warehouse process.

To delete a line item, click the button. A Confirmation box appears, asking you to confirm you want to delete the selected row. Click the button to delete the line item.

- Optional. To add an attachment to the requisition, click the button in the Requisition Attachments panel and navigate to the file to be uploaded. The file name is displayed on the tab. You can enter a Description for the attachment. To add another attachment, click the button. To remove an attachment, click the icon. (If the Requisition Attachments panel is closed, click to open it.)
- When you have finished adding items on the Line Items tab, click the button. A message is displayed that tells you the requisition was successfully created and asks you if you would like to create another requisition.



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: **Create Warehouse Requisitions**

Warehouse Requisition Line Items

Cart Total Amount: **\$0.00**

Save as Fav.?	Deliver All Together	Quantity	Qty Available	Purchase Item Number	Purchasing Category	Unit of Measure	Long Description	Justification	Back Order Allowed	Special Instructions	Unit Price	Unit Dscnt.	Total Line Amount	Accounts	Type
<input type="checkbox"/>		10	28.0	3502295	WHSE - Athle	DZ	SHORTS,XSM		<input checked="" type="checkbox"/>		0.00	0.00	0.00	199-41-6399-000-729-99-000000 -	Warehouse
<input type="checkbox"/>		1	104.0	3502355	WHSE - Athle	DZ	SHORTS,3XL		<input checked="" type="checkbox"/>		0.00	0.00	0.00	199-41-6399-000-729-99-000000 -	Warehouse
<input type="checkbox"/>		5	28.0	3502295	WHSE - Athle	DZ	SHORTS,XSM		<input checked="" type="checkbox"/>		0.00	0.00	0.00	199-41-6399-000-729-99-000000 -	Warehouse
<input type="checkbox"/>		1	52.0	3502350	WHSE - Athle	DZ	SHIRT, GYM A		<input checked="" type="checkbox"/>		0.00	0.00	0.00	199-41-6399-000-729-99-000000 -	Warehouse

Requisition Attachments

[Add Line from Scratch](#) [Add Line from Catalog](#) [Save Cart as Incomplete](#) [Submit](#) [Return](#) [Cancel Shopping Cart](#)

You can click the Save Cart as Incomplete button to save the requisition and complete it at another time. When you want to return to the requisition, select Warehouse (Saved) on the Select Requisition Type tab, and select the requisition you created from the drop-down list. When you click the **Save Cart as Incomplete** button, funds will be encumbered. If your district uses the approval workflow with warehouse requisitions, the cart will not be submitted for approval until you click the **Submit** button on the Line Item tab. If you want to cancel the shopping cart without saving it for a later time or submitting it for approval, click the **Cancel Shopping Cart** button.