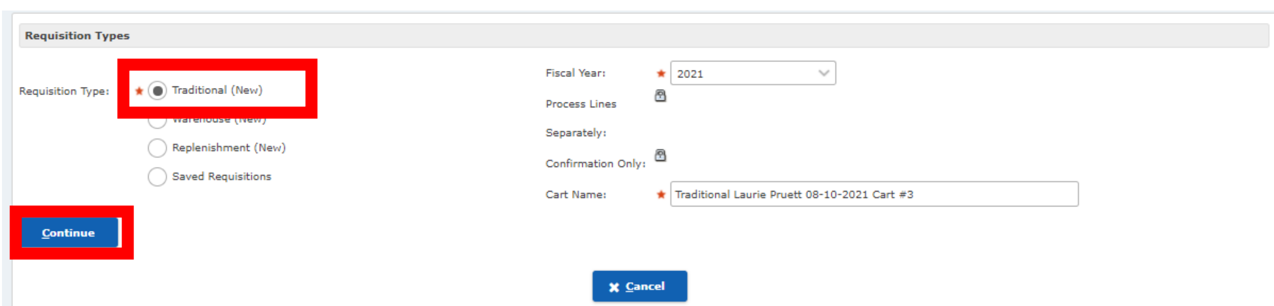
	FRONTLINE PROCEDURES Pasadena ISD	ENTRY POINT: Create Requisitions
DATE DEVELOPED: 07/19/2021	REVISED DATE:	
SUBJECT:	**Create Blanket Requisitions**	

Create Blanket 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:

Creating Blanket 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

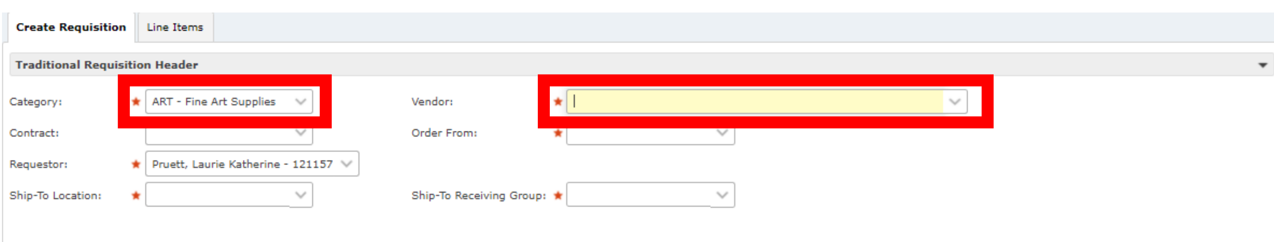
- You can change this information, if necessary.

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.

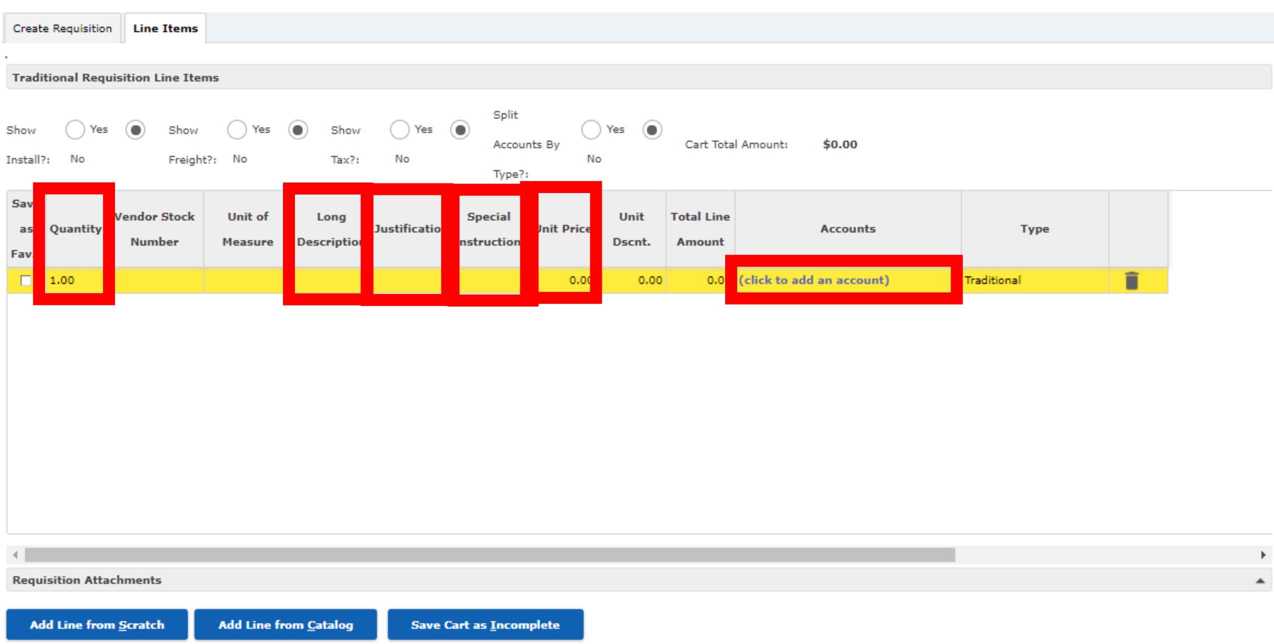


- If you select a procurement Category first, the vendor drop-down list is populated with those vendors that are awarded in the category you selected. Choose your categories consistently, as they are used districtwide in analysis of spend and if PISD is following procurement laws.

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



- You will enter as a reverse dollar amount
- 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**
Quantity	Enter dollar amount
Unit of Measure	Leave this blank
Long Description	Enter a long description, 1000 characters maximum.
Justification	Type the word Blanket in this field, if you DO NOT want the PO emailed to vendor
Special Instructions	Enter Authorized Buyers
Unit Price	Enter 1

- 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.

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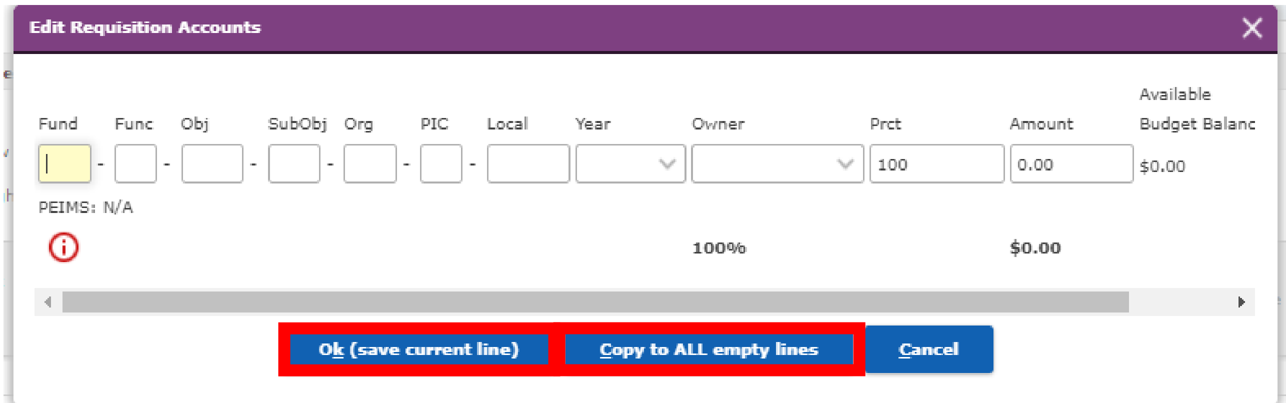


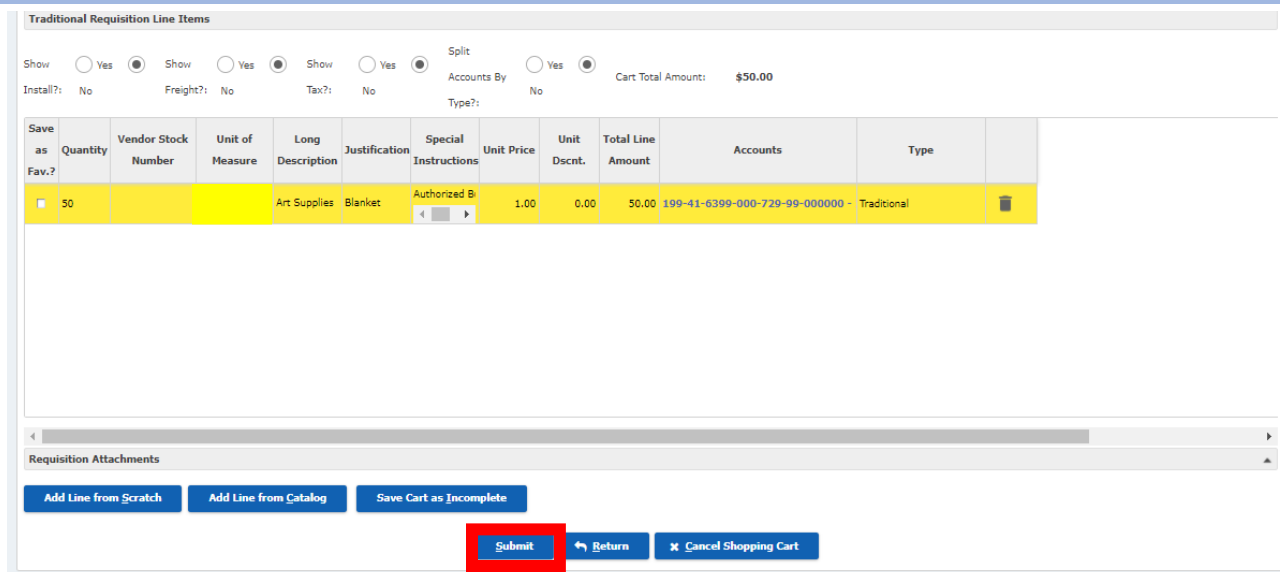
- Enter the account number or any part of the budget and SCROLL TO THE RIGHT and click the icon to select one from the Account Numbers tab.

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

- Check the Year.
- Check the Owner.

To delete an account, click the icon.

- 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.



- 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.