



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create
Requisitions

DATE DEVELOPED: 2/14/2022

REVISED DATE:

SUBJECT: **Project Requisitions**

Create Project Requisitions

- Click the **Create Requisitions** entry point. The Select **PROJECT**

Requisition Types

Requisition Type: Traditional (New) Warehouse (New) Replenishment (New) Saved Requisitions Not To Exceed Requisition - Project Blanket

Maximum Amount \$500

Fiscal Year:

Process Lines: Yes No

Separately: Yes No

Confirmation Only: Yes No

Continue **Cancel**

<https://erpsis-help.frontlineeducation.com/hc/en-us/articles/360037824713-Creating-a-Project-Requisition>

- Select a **Fiscal Year** from the drop-down list.
- Click the **Continue** button. The Create Project Requisition tab appears.



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Create Project Requisition Header

Fiscal Year: ★ 2022 Vendor: ★

Category: ★ Order From: ★

Requestor: ★ Contract:

Ship-To Location: ★ Ship-To Receiving: ★

Group:

Description: ★ Justification:

Characters remaining: 1000 (1000 max) Characters remaining: 256 (256 max)

Notes:

Characters remaining: 2000 (2000 max)

Create Project Requisition Description

Description	Total Amount	Released Amount	Balance Amount	Total Invoiced	Account Num
	0.00	0.00	0.00	0.00	(click to add an account)

[+ Add New Description](#)

Messages

Create Project Requisition Attachments

[Upload](#) [Quick Scan](#) [Scan](#)

Drop files here

or use the Upload and Scan buttons to attach, up to 1024 MB per file.

File Name Description Delete

[Submit](#) [Save Attachments](#) [Clear](#) [Notes](#) [Save as Incomplete](#)

[Save and Restart Approval](#) [Approve and Return](#) [Return](#)

- The **Category** and **Vendor** fields are related. If you select a Category first, the vendor field is populated with those vendors that are assigned to the category you selected.
- If you select a Vendor first, the category field is populated with those categories that are assigned to the vendor you selected.
- Choose **Order from:**



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- The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.
- Select the **Ship-To Location** from the drop-down list.
- Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
- Enter a **Description**.
- In the **Justification** field, the Buyer will enter the Bid Justification. You will not enter in this field.
- **Under Create Project Requisition Description:**
- Enter **Description** in box
- Click in the cell under the **Total Amount** column to change the total amount.
- Click the (**click to add account**) link to enter the account number. The Edit Accounts pop-up box appears.

FND	FN	OBJ	SO	ORG	PI	L	PR	Year	Owner	Prct	Amount	Available Budget Balan
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	100	0.00	\$0.00

PEIMS: N/A

(i) 100% \$0.00

Ok (save current line) Copy to ALL empty lines Cancel

- Enter the account number, or click the icon to select another one from the **Account Numbers** tab.
- Select the **Year** from the drop-down list.
- Select the **Owner** from the drop-down list.
- 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.



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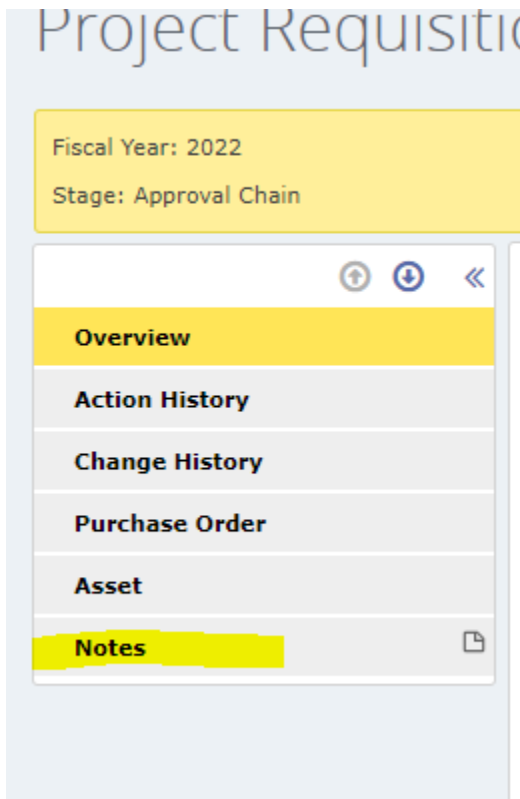
REVISED DATE:

SUBJECT: Project Requisitions

- Optional. Click the plus icon to add another account number for the requisition. Repeat steps 17 through 21, and ensure that the Percentage fields for all accounts add up to 100.
- Use the Action column (trash can) to delete a line item.
- Click the **OK** button. The new account number is populated in the Account Number column.
- Click the **Submit** button.
- The Select Requisition Type tab appears with a message that the project requisition was successfully saved.

Adding Authorized Buyers

- Click **Notes**



- **Add** Authorized Buyers to **Notes Box**
- Private: **Select** No
- Internal Only: **Select** No
- Communication Method: **Select** Email
- **Click** Add



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Notes List/Detail

Notes

Authorized Buyers: Laurie Pruett 

Notes:



Characters remaining: 1968 (2000 max)

Private:



Yes No

Internal Only:



Yes No

Communication Method:

 Add

 Clear



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Releasing Funds on Project Requisitions

In the SEARCH BOX, type **Search** and choose **Blanket/Project Requisition Search**
Req. Type: Choose **Project**
Click **Search**

The screenshot shows a web interface for searching requisitions. At the top, there are four tabs: "My Requisitions", "Requisitions I Approved", "Requisitions I Analyzed", and "All Requisitions" (which is selected). To the right, there is a "Requisition Type" dropdown menu set to "Project". Below this is a "Search Criteria" section with various filters:

- Fiscal Year:** 2022
- Category:** (empty dropdown)
- Min Amount:** (empty text box)
- Requisitioner:** (empty dropdown)
- Stage:** (empty dropdown)
- Shopping Cart Name:** (empty dropdown)
- Vendor:** (empty text box)
- Limit to Releasable:** Radio buttons for "Yes" and "No" (with "No" selected)
- Max Amount:** (empty text box)
- Description Contains:** (empty text box)
- Status:** (empty dropdown)
- Requisition Create Date:** Minimum: 09-01-2021, Maximum: (empty date picker)
- Purchase Order Date:** (empty date picker)
- Account Number:** Fields for Fund, Func, Obj, SubObj, Org, PIC, Local
- PO Number:** (empty text box)

A blue "Search" button is located at the bottom left of the form.

Click on **Purchase Order Detail Lines** and Click **Maintain**

Click on the **Released Amount blue hyperlink \$ amount** under Project Requisition Overview Description.



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Project Requisition Overview Header

Fiscal Year: 2022
 Category: CNST - Prof Svcs, Facilities
 Requestor: Gallardo, Monica - 20012
 Ship-To Location: Facilities & Construction - 850
 Description: 2017 BOND - NEW THOMPSON INT. CONSTRUCTION MATERIALS TESTING PO # 407818

Vendor: TERRACON CONSULTANTS INC
 Order From: (P) TERRACON CONSULTI
 Contract:
 Ship-To Receiving Group: 850 Facilities & Construction
 Justification: OPEN PO BALANCE XFER FROM LAWSON TO FRONTLINE

Characters remaining: 926 (1000 max) Characters remaining: 211 (256 max)

Project Requisition Overview Description

Description	Total Amount	Released Amount	Balance Amount	Total Invoiced	Account Numbers	Action
2017 BOND - NEW THOMPSON INT.	87,804.00	0.00	87,804.00	0.00	641-81-6625-503-949-99-PROFSV	

Messages

Project Requisition Overview Attachments

Upload Drop files here or use the Upload button to attach, up to 10 MB per file.

File Name	Description	Delete
ThompsonIS_Terracon Agreement_2021.07.27_Signed+Req&PO.pdf	Lawson PO & Agreement	
ThompsonIS_Terracon Project Req. Frontline_2021.12.15.pdf	Lawson PO Balance Xfer Detail	

Submit Save Attachments Clear Notes

Enter **Amount** in the **New Release Amount** box.

Release Funds

New Release Amount: Release Date: 02-11-2022

Release

Prior Releases

Release Amount	Released By	Released On



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Click **Release** and close box by clicking the **X** in the top right corner

Project Requisition Overview Header

Fiscal Year: 2022 Vendor: TERRACON CONSULTANTS INC
 Category: CNST - Prof.Srvcs, Facilities Order From: (P) TERRACON CONSULTY
 Requestor: Gallardo, Monica - 20012 Contract:
 Ship-To Location: Facilities & Construction - 850 Ship-To Receiving Group: 850 Facilities & Construction
 Description: 2017 BOND - NEW THOMPSON INT. CONSTRUCTION MATERIALS TESTING PO # 407818 Justification: OPEN PO BALANCE XFER FROM LAWSON TO FRONTLINE

Characters remaining: 926 (1000 max) Characters remaining: 211 (256 max)

Project Requisition Overview Description

Description	Total Amount	Released Amount	Balance Amount	Total Invoiced	Account Numbers	Action
2017 BOND - NEW THOMPSON INT.	87,804.00	100.00	87,704.00	0.00	641-81-6625-503-049-99-PROFSV	

Messages

Project Requisition Overview Attachments

Upload Drop files here or use the Upload button to attach, up to 10 MB per file.

File Name	Description	Delete
ThompsonIS_Terracon Agreement_2021.07.27_Signed+Req&PO.pdf	Lawson PO & Agreement	
ThompsonIS_Terracon Project Req. Frontline_2021.12.15.pdf	Lawson PO Balance Xfer Detail	

Submit Save Attachments Clear Notes

Click **Submit**

Send Revised PO?

Send Revised Yes No

PO: Yes No

Ok

A **Send Revised PO** box will appear and you Click **No** and then Click **OK**