	FRONTLINE PROCEDURES Pasadena ISD	ENTRY POINT: Create Requisitions
DATE DEVELOPED: 07/27/2021	REVISED DATE:	
SUBJECT:	**Create Warehouse Requisitions**	

Create Warehouse Requisitions

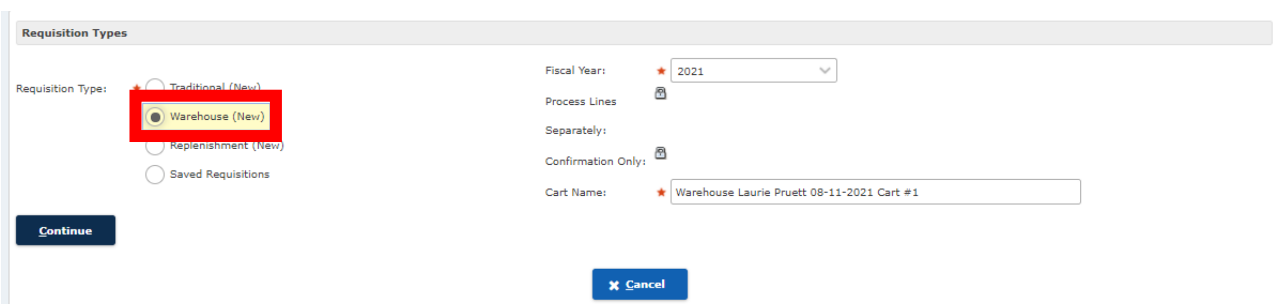
District personnel use the Create Requisitions entry point to requisition items stored in district warehouses. Once submitted, warehouse requisitions can be viewed and maintained through the Requisition Search entry point.

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.



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

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.

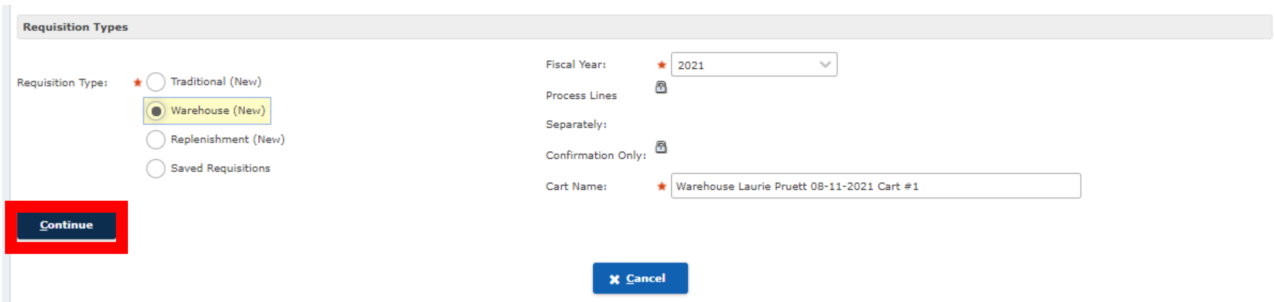
The Confirmation Only option is not used with warehouse requisitions at this time

- 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 Continue button. The Create Requisition tab appears.



- 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.

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

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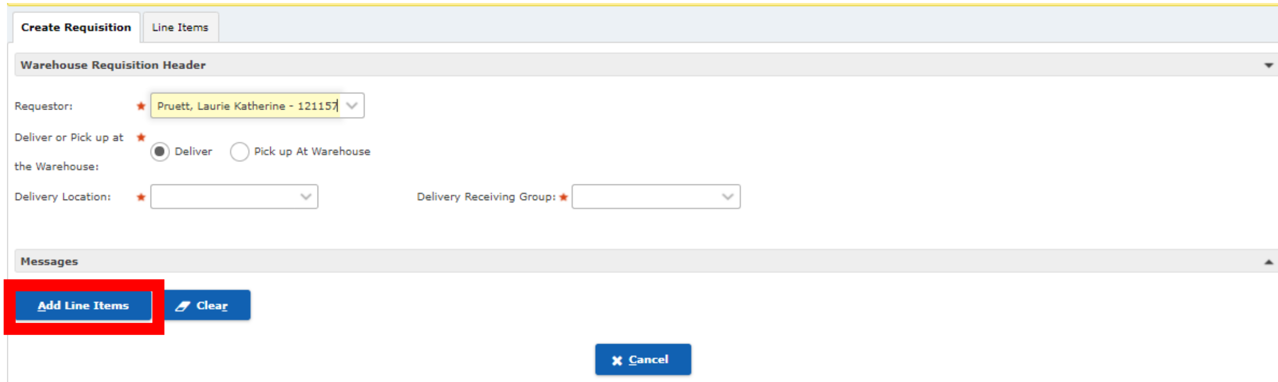
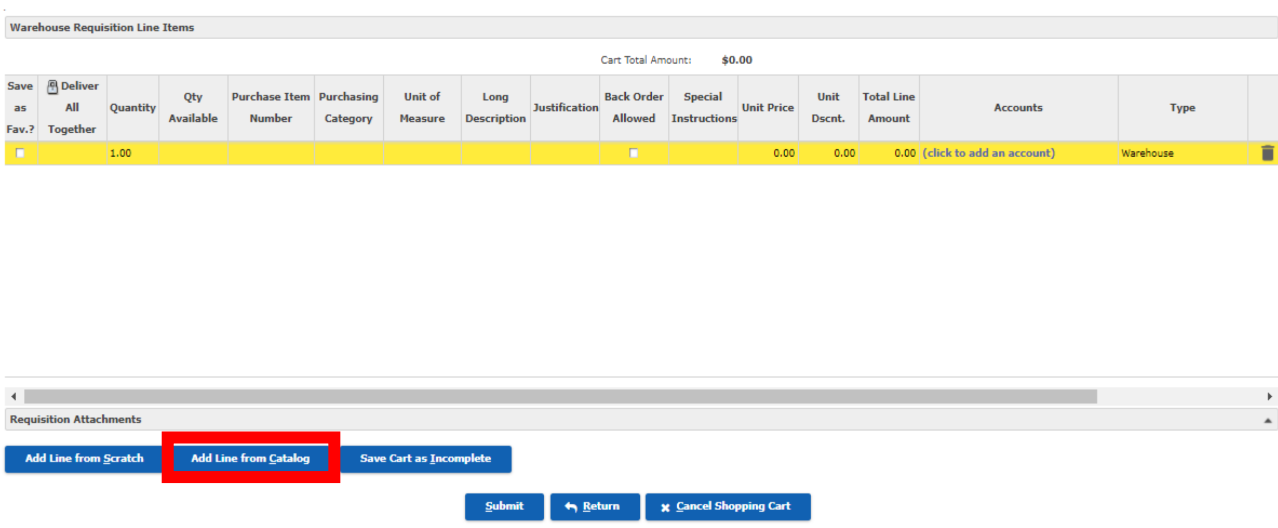
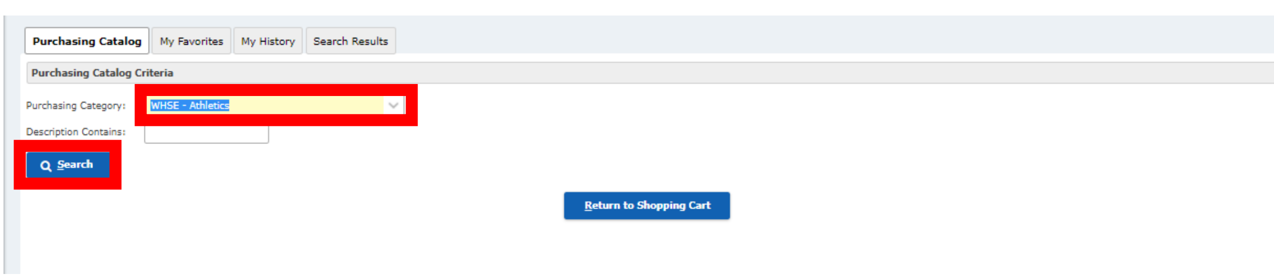


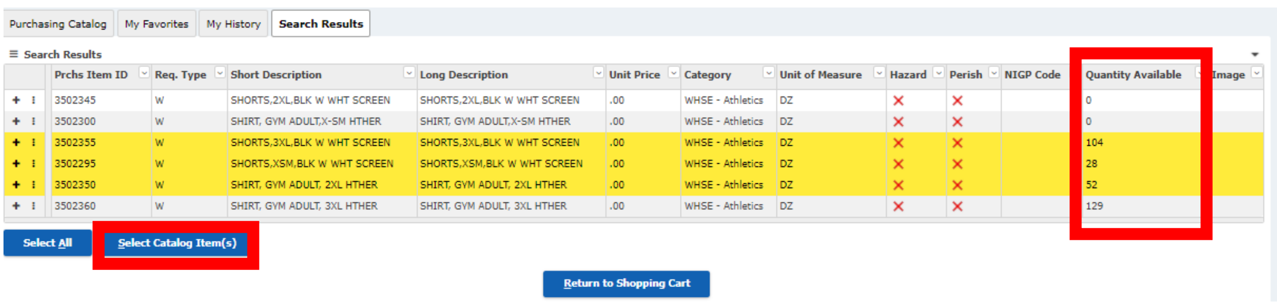
- Click Add Line from Catalog



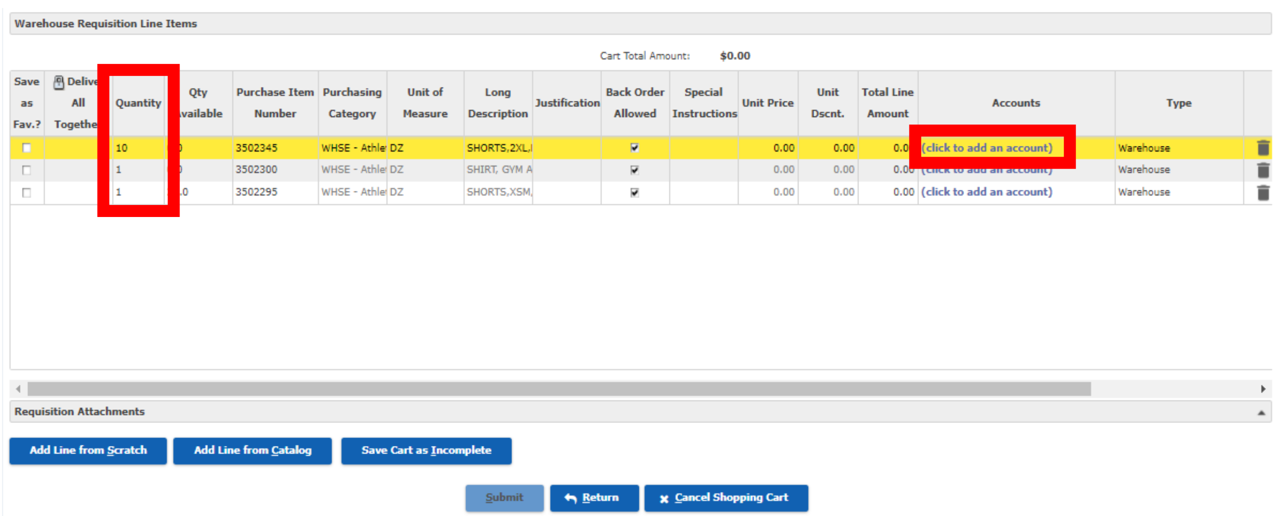
- Purchasing Category: Scroll down to WHSE and pick category
- Click "Search"



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



- Click to Add an Account
- Enter Quantity



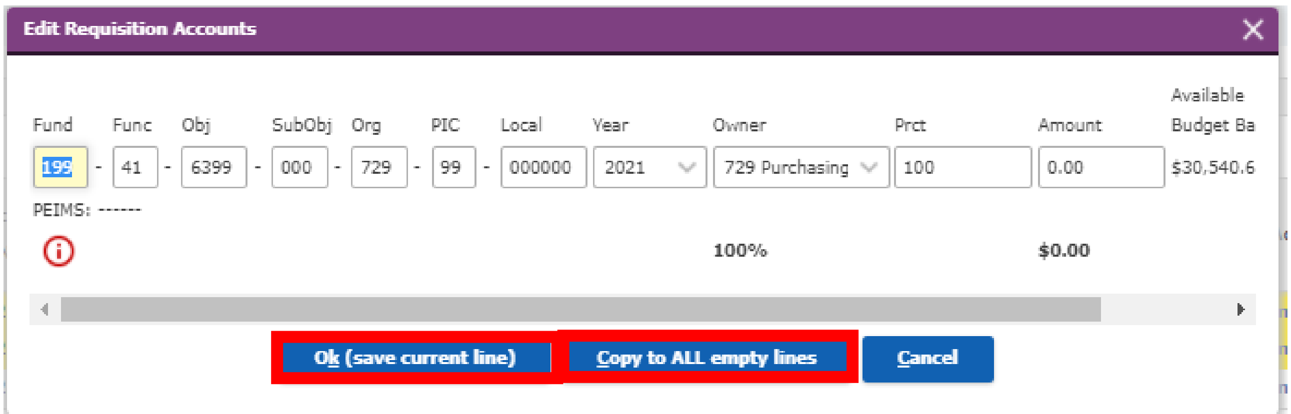
- Enter account number or scroll over, enter "Owner" (location) and click search magnifying glass icon

- Choose budget code

- Click select
- Click Ok to save current line only

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.

- 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 OK 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 Yes button to delete the line item.

- Optional. To add an attachment to the requisition, click the Choose File 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 Submit button. A message is displayed that tells you the requisition was successfully created and asks you if you would like to create another requisition.

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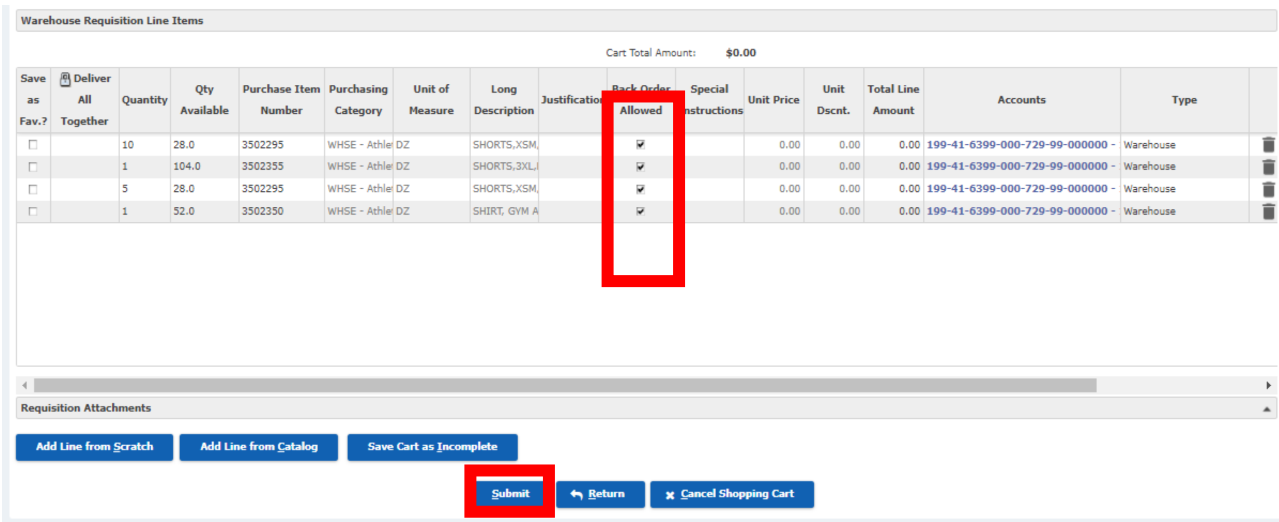

You can click the Save Cart as Incomplete button to save the requisition and complete it at another time. When you want to return to the requisition, select Warehouse (Saved) on the Select Requisition Type tab, and select the requisition you created from the drop-down list. When you click the **Save 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.