



501 PR342

Processing Requisitions

Web Based Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Learning.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Variety of simulations
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

After completing this course, you will be able to:



Identify requisition concepts, processes, integration, and interfaces



Create and submit a requisition in the Purchasing and the eProcurement modules



Maintain a requisition in the Purchasing and the eProcurement modules



Agenda

1

Understanding Requisitions

2

Creating a Regular Requisition

3

Creating an eProcurement Requisition

4

Maintaining a Requisition

5

Processing Requisitions Hands-On Practice



Lesson 1: Introduction

1

Understanding Requisitions

This lesson covers the following topics:

- Procurement Overview
- Key Concepts
- Requisition Basics
- Requisition Process
- Integration within Procurement
- Requisition Suppliers
- Interfaces with WebIMS and FleetFocus M5



Procurement Overview

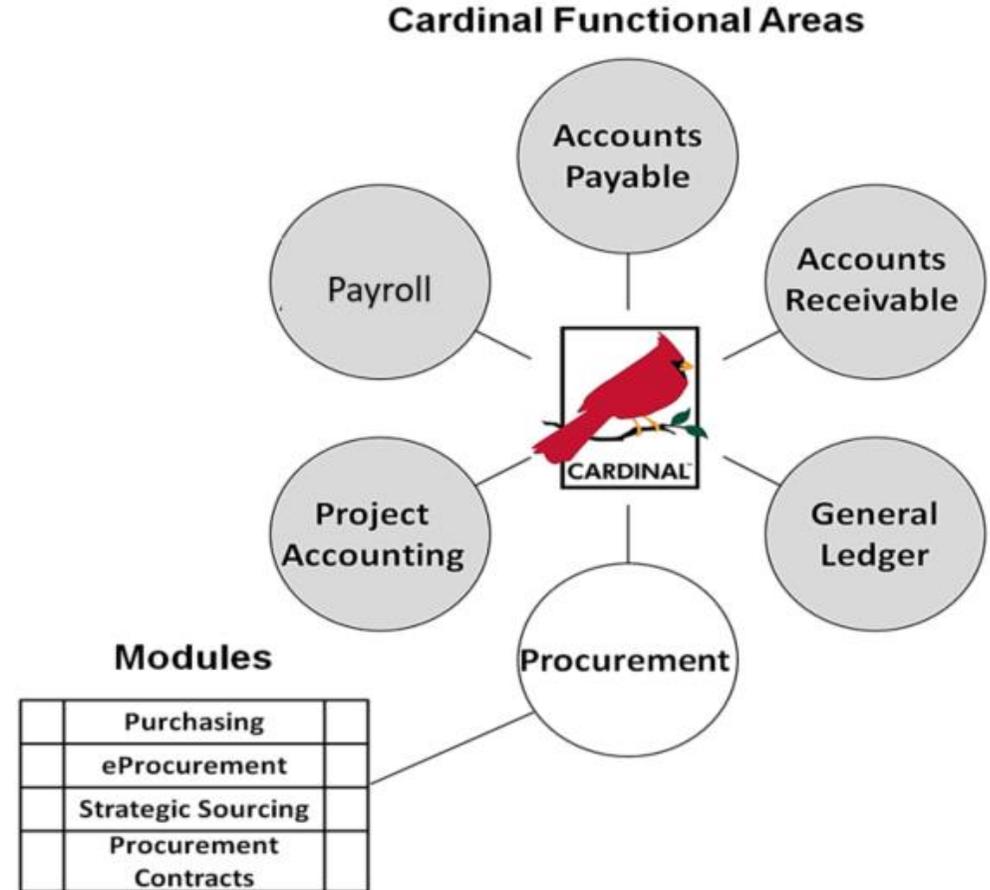
The Procurement functional area of Cardinal includes four modules:

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, procurement card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.





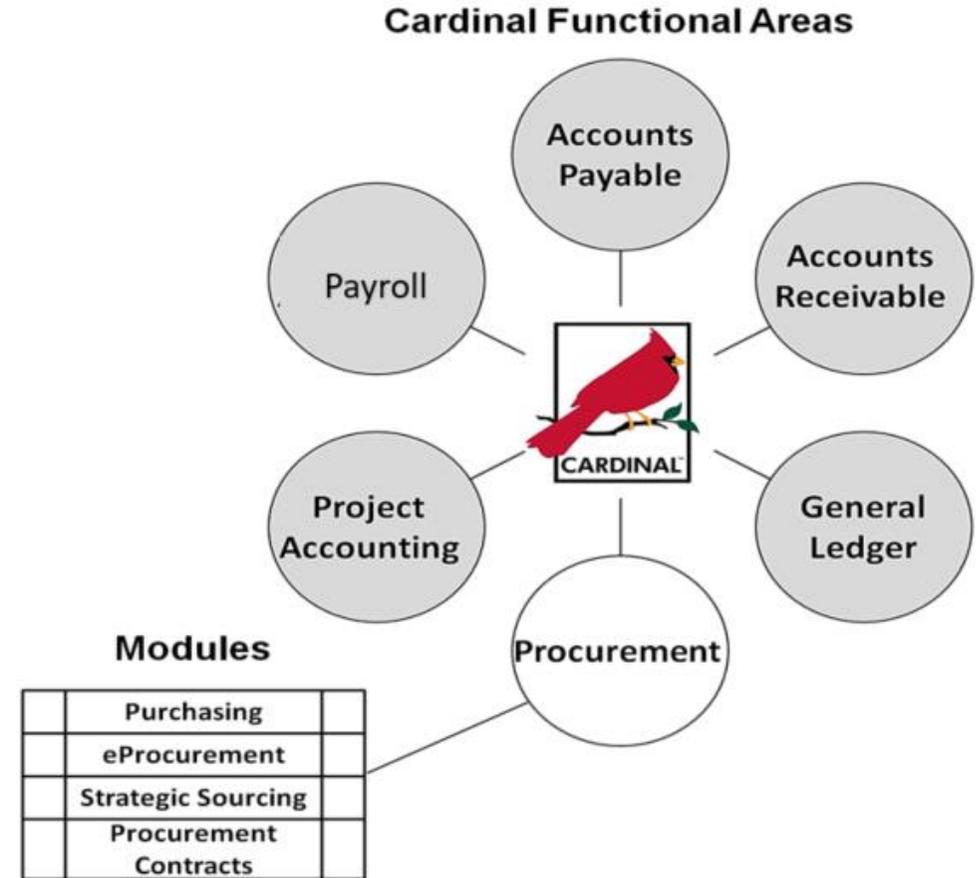
Procurement Overview (continued)

Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids/proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.





Key Concepts

Key concepts include:

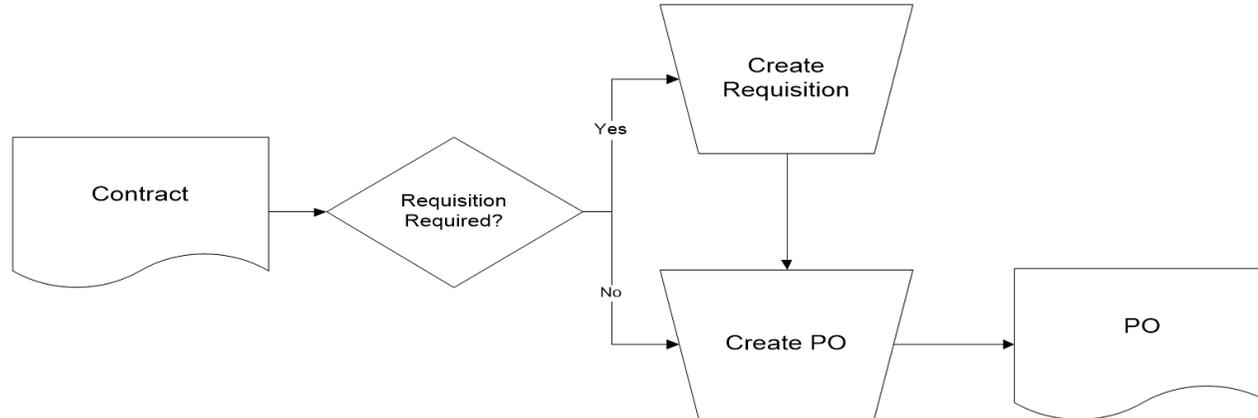
- A requisition is a request for goods and/or services. Requisitions are used to identify and quantify the need for a good or service and document the approval. Once approved, a requisition is sourced to a purchase order (PO) or a sourcing event - Invitation for Bid (IFB) or Request for Proposal (RFP).
- A requisition may be created using either the Purchasing or eProcurement module. However, eProcurement requisitions are not used for the web inventory management system (IMS) restock or issuances.
- Cardinal users share a centralized supplier database maintained by the Commonwealth Vendor Group (CVG). A supplier must be recorded in the statewide supplier database before the supplier can be used on a Cardinal transaction (e.g., requisition, purchase order, sourcing event, voucher, payment).
- eVA, the Commonwealth's web-based procurement system, is the source of procurement supplier information in Cardinal. Procurement suppliers are interfaced from eVA to Cardinal via a nightly interface. Non-procurement suppliers, also known as fiscal suppliers, are created directly in Cardinal by CVG.



Requisition Basics

Requisition Basics:

- Any user can create a requisition, but only a Buyer can create a purchase order or a sourcing event for the requisition. POs commit the agency to procuring the goods and/or services.
- Purchases in Cardinal must have a PO, but not all POs need a requisition. If a good or a service is already on contract, a requisition is not generally required. Simply create a PO against the contract and avoid additional steps.
- Inventory issue and restock transactions must be done using a requisition in the Purchasing module. The data from the requisition is loaded in WebIMS to track inventory quantities.

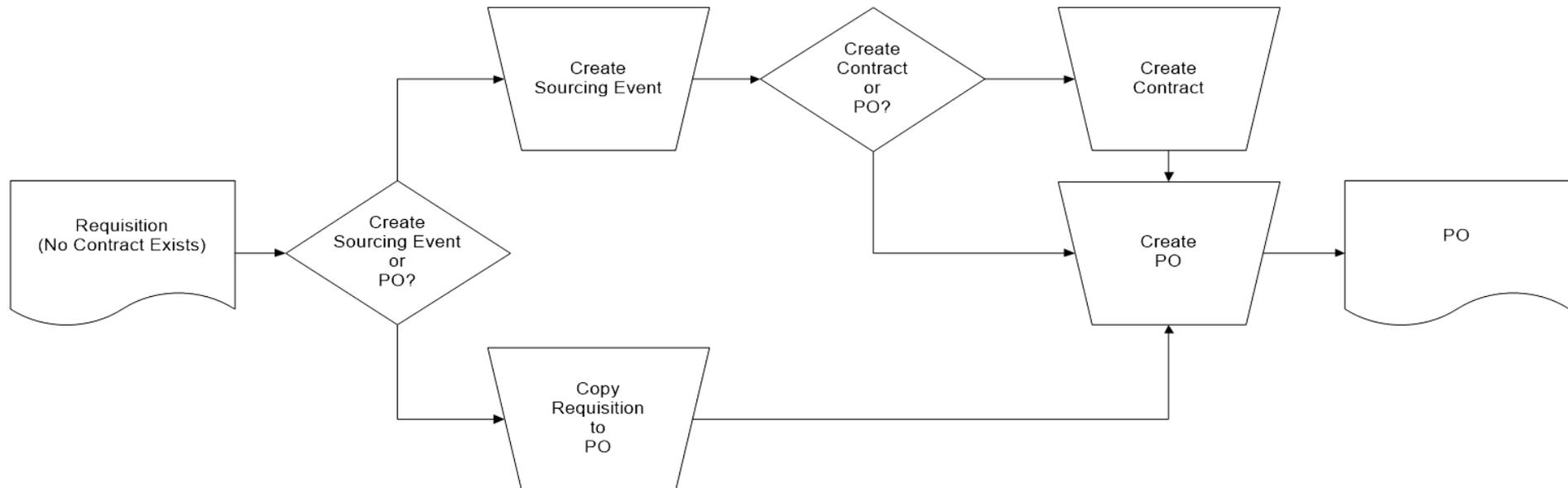


For more detailed information about creating inventory and restock requisitions, see the course entitled **501 PR347: Inventory Issuances and Restock** located on the Cardinal website in **Course Materials** under **Learning**.



Requisition Basics (continued)

- If a requisition is created and there is no contract with a supplier, you have two options:
 1. Create a Sourcing Event: Once approved, the requisition goes through a solicitation process, which involves creating a sourcing event. This process allows suppliers to bid against the event. Winning bidders are awarded a contract or purchase order.
 2. Copy the Requisition to a Purchase Order: When the value of goods or services falls within the range of a small purchase or is otherwise permitted, the Buyer can copy the requisition directly into the purchase order, rather than creating a sourcing event and awarding a contract.





Requisition Basics (continued)

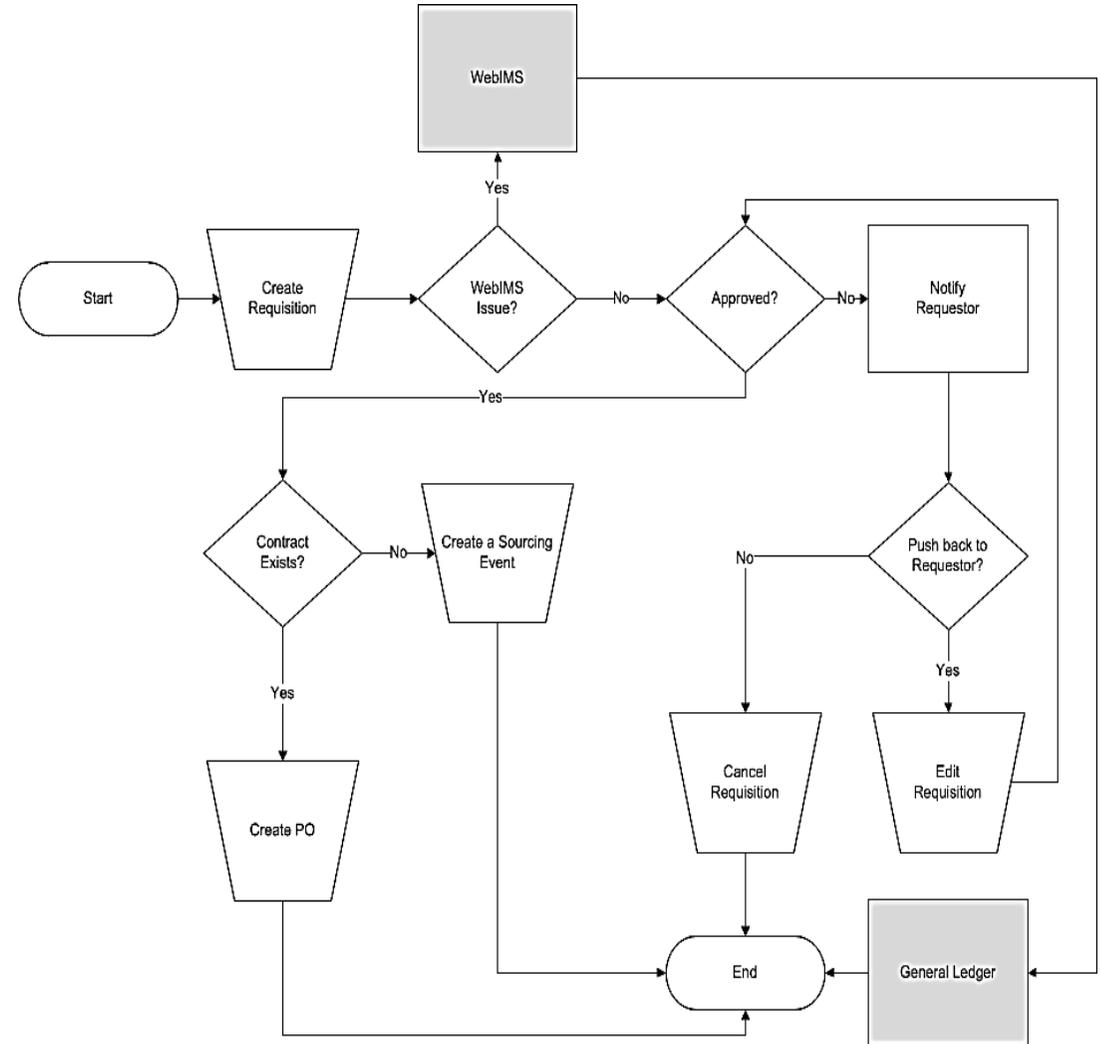
- Requisitions can be set to amount only or quantity. Using amount allows for the receipt by amount.
- When creating a requisition, the supplier may not be known. This information is only mandatory for contracts and purchase orders.
- eVA Direct Orders (DOs) are loaded directly into Cardinal and purchase orders are created.



Requisition Process

Entering and maintaining requisitions includes:

- Create requisition
- If a contract does not exist, create a sourcing event
- If a contract does exist, create a purchase order by copying the requisition
- Edit requisition
- Cancel requisition

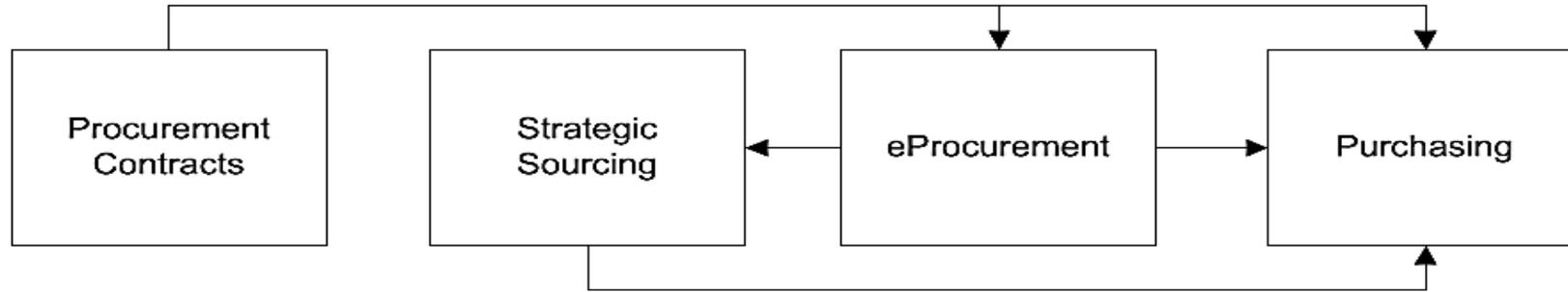


Click on image to enlarge



Integration within Procurement

Processing a requisition involves the interaction of several modules within the Procurement functional area.

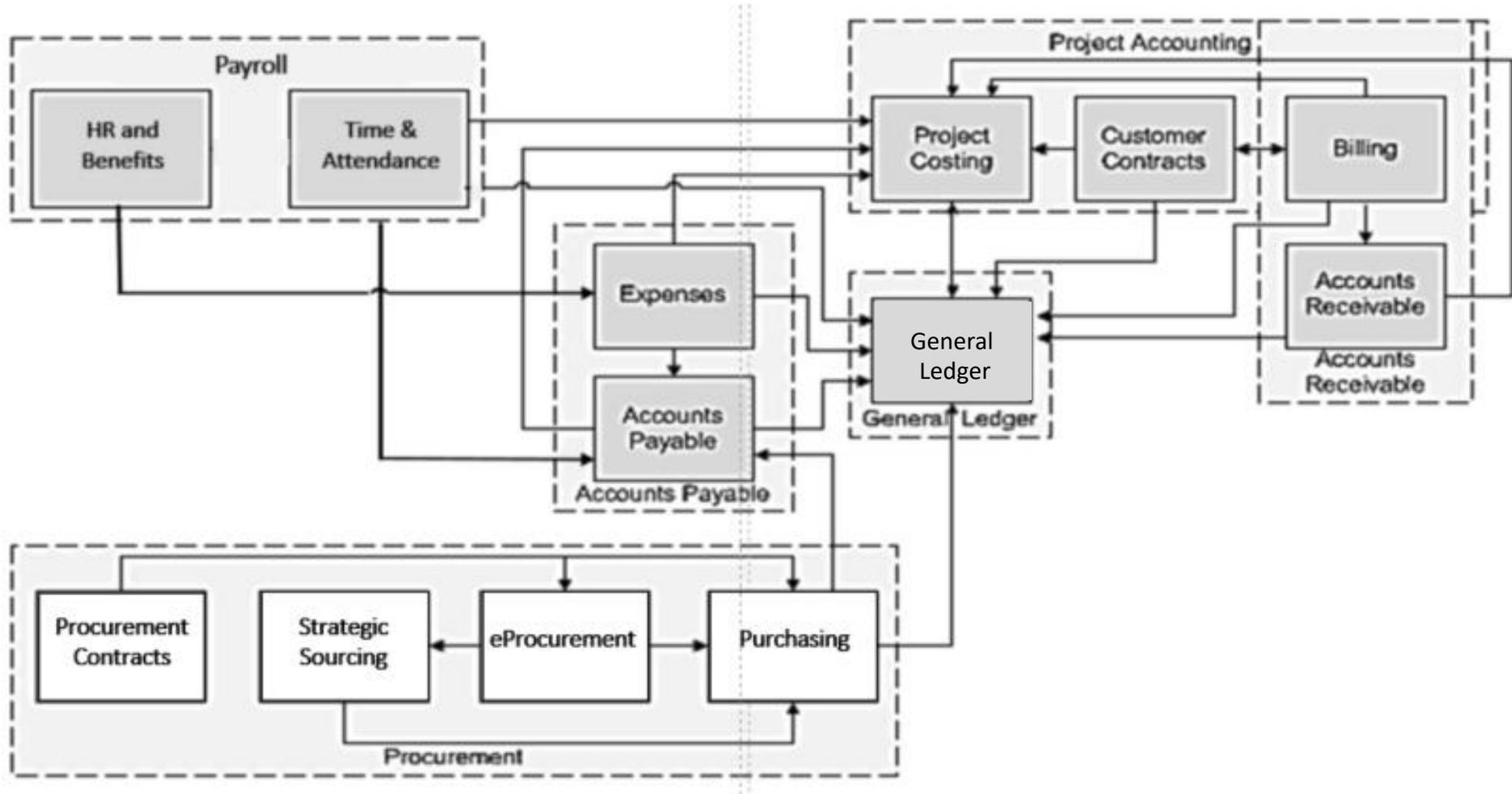


Requisitions interact with Purchasing, Procurement Contracts, Strategic Sourcing, and eProcurement modules:

- **Purchasing/eProcurement** - Requisitions are created in either module.
- **Purchasing** - A requisition can be sourced into a purchase order. Purchase orders are managed in the Purchasing module.
- **Procurement Contracts** - A requisition can be sourced from an established contract. Contracts are managed in the Procurement Contracts module.
- **Strategic Sourcing** - A requisition can be sourced to an event. The event will go through a bid process (solicitation) in the Strategic Sourcing module.



Integration within Procurement (continued)





Requisition Supplier: eVA and CVG

When creating a requisition, first search for a supplier to add to the requisition. All suppliers are shared across the Commonwealth in one centralized database maintained by the Commonwealth Vendor Group (CVG).

A supplier must be added to Cardinal before it can be used on a requisition, purchase order, sourcing event, voucher or payment. However, in creating a requisition, the supplier is not a required field. This can be added later on the purchase order.

eVA updates procurement supplier information through a nightly interface into Cardinal. Non-procurement suppliers, also known as fiscal suppliers, are created directly in Cardinal by CVG.

eVA Direct Orders (DOs) are loaded directly into Cardinal and purchase orders are created.



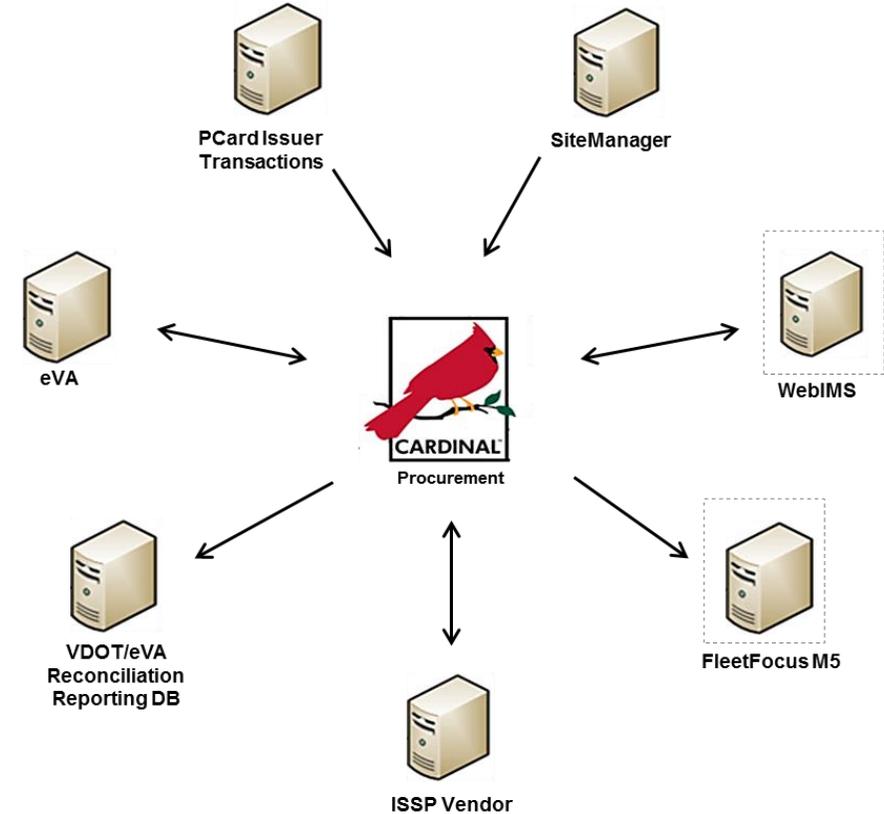
Interfaces with WebIMS and FleetFocus M5

WebIMS:

- **Stock Issuance** - When processing an issuance of stock, a Storekeeper/Requisitioner can order stock items from the web inventory system (WebIMS). WebIMS sends a notification to the Storekeeper alerting them of the status of the order and the document ID (**Doc ID**). WebIMS decrements inventory on hand.
- **Stock Reorder** - The Storekeeper can reorder stock for WebIMS by creating a restock type requisition. The restock requisition creates a **Doc ID** and sets flags for the related purchase orders and receipts. Upon getting a receipt tied to a restock requisition, a **Doc ID** is created and interfaced with the quantity to WebIMS to increase quantity on hand.

FleetFocus M5:

- FleetFocus M5 is VDOT's equipment management system which tracks equipment mileage/hours, maintenance, and repair history. In Cardinal, requisitions are created for repairs/parts and FleetFocus M5 records the repair history.





Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.



When would an end user create a requisition?

- When the item is not on contract
- When a request needs an RFQ (Request for Quote)
- When the item is on a contract
- All of the above

When processing a requisition, which external systems specifically interface with the requisition?

- WebIMS and FleetFocus M5
- eVA
- Fleet Focus M5
- eVA and Fleet Focus M5

Does a requisition require approval before it is sent to a Buyer?

Yes

No



Lesson 1: Summary

1

Understanding Requisitions

In this lesson, you learned:

- Procurement
- Requisition key concepts
- Requisition basics
- Two ways to initiate a requisition: Purchasing and eProcurement modules
- Procurement suppliers
- The ways requisitions integrate with other Cardinal modules
- The ways requisitions interface with external systems: WebIMS and FleetFocus M5



Lesson 2: Introduction

2

Creating a Regular Requisition

This lesson covers the following topics:

- Create a Requisition in the Purchasing Module
- Add Items
- Requisition Lines
- Requisition Schedules



Create a Requisition in the Purchasing Module

When creating a regular requisition in the Purchasing module, if needed, it may be customized.

To create a requisition in the Purchasing module you navigate to the **Maintain Requisitions – Requisition** page using the following path:

Main Menu > Purchasing > Requisitions > Add/Update Requisitions

From the **Add a New Value** tab click **Add**.

The **Maintain Requisitions – Requisition** page displays.

The **Header** section contains some key data including **Requester**, **Requisition Date**, and **Origin**.

For more detailed information about creating a requisition from a contract or another requisition, see the job aid entitled **501 PR342: Create Requisitions** located on the Cardinal website in **Job Aids** under **Learning**.

The screenshot shows the 'Requisitions' page in the Cardinal system. The breadcrumb trail is 'Main Menu > Purchasing > Requisitions > Requisitions'. The 'Add a New Value' tab is highlighted with a red box. Below the tabs, there are input fields for 'Business Unit' (50100) and 'Requisition ID' (NEXT). An 'Add' button is located at the bottom of the form.

The screenshot shows the 'Maintain Requisitions – Requisition' page. The breadcrumb trail is 'Main Menu > Purchasing > Requisitions > Add/Update Requisitions'. The 'Maintain Requisitions' and 'Requisition' tabs are highlighted with red boxes. The page displays various fields for requisition details, including Business Unit (50100), Requisition ID (NEXT), and WebIMS Req Type (Regular). The 'Header' section is highlighted with a red box and contains fields for Requester (GEORGE MASON), Requisition Date (01/15/2017), and Origin (ONL). The 'Amount Summary' section shows a Total Amount of 0.00 USD. Below the header, there is a table for requisition lines with columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first line is visible with a quantity of 0.0000 and a status of Open.



Create a Requisition in the Purchasing Module (continued)

CARDINAL All Search Advanced Search

Favorites Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type **Regular** Status Open

Requisition ID NEXT
Requisition Name Copy From Hold From Further Processing

Header ?

*Requester MASON,GEORGE
*Requisition Date Requirer Info
Origin Online Input
*Currency Code Dollar

Requisition Defaults Add Comments
Requisition Activities

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requirer Items

Line ? Personalize | Find | View All | First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display



Adding Items

Items can be added to the requisition using either **Item ID** or **Category**.

- Key in, or look up, the National Institute of Governmental Purchasing (NIGP) Item number, i.e., **Item**. This is the most common method to select an **Item**. On each line, click on the magnifying glass next to the **Item** field. The items listed will be narrowed down to items related to the supplier you previously selected. The **UOM** and **Description** field values default from the item table.
- Key in or look up the NIGP Category, i.e. **Category**. On each line, click on the magnifying glass next to the **Category** field. This method will not be limited to items related to the chosen supplier. You will need to complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open
2			0.0000			0	0.00	Open



Adding Items (continued)

- Use the **Item Search** hyperlink to search by **Category**, **Description**, or **Item ID**.
- Use the **Requester Items** hyperlink, which lists items the Requester has previously requested.
- The **Purchasing Kit** and **Catalog** hyperlinks are not generally used.

The screenshot shows the 'Add/Update Requisitions' page in the CARDINAL system. The page is titled 'Maintain Requisitions' and 'Requisition'. It displays various fields for requisition details, including Business Unit (50100), Requisition ID (NEXT), and Requisition Name. The 'WebIMS Req Type' is set to 'Regular' and the 'Status' is 'Open'. There are links for 'Requester Info', 'Online Input', and 'Dollar'. An 'Amount Summary' section shows a 'Total Amount' of 50.00 USD. Below this, there are links for 'Add Items From', including 'Purchasing Kit', 'Catalog', 'Item Search' (highlighted with a red box), and 'Requester Items'. At the bottom, there is a table with columns for Line, Item, Description, Quantity, *UOM, Category, Price, Merchandise Amount, and Status. The table contains two rows: Line 1 with Item 0051404115, Description ABRASIVES, Quantity 2.0000, *UOM RO, Category 0051404, Price 25.00000, Merchandise Amount 50.00, and Status Open; and Line 2 with Item, Description, Quantity 0.0000, *UOM, Category, Price 0, Merchandise Amount 0.00, and Status Open. The page also includes navigation buttons like 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.



Adding Items (continued)

Helpful Hints for Items:

- On the **Maintain Requisitions – Requisition** page, the **Item Information** tab allows entry of specific Supplier Item information, e.g., Grainger Catalog, Version 13, pg. 6, Item # XXXXXX.
- For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.
- To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.

Add Items From ?

Purchasing Kit Catalog
Item Search Requester Items

Line ? Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Details Ship To/Due Date Status Supplier Information **Item Information** Attributes Contract Sourcing Controls WebIMS

Line	Item	Description	GTIN	RFQ Required	Device Tracking	Supplier Item ID	Supplier's Catalog	Manufacturer ID	Manufacturer's Item ID
1	0051404115	ABRASIVES,		<input type="checkbox"/>	<input type="checkbox"/>				920253

View Approvals *Go to ...More... [Dropdown]

Save Notify Refresh Add Update/Display



Adding Items (continued)

CARDINAL All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

Header

*Requester GEORGE.MASON MASON,GEORGE

*Requisition Date 01/15/2017 Requirer Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit Catalog

Item Search Requirer Items

Line Personalize Find View All First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display



Requisition Lines

In the **Line** section there are multiple tabs which contain information: **Details**, **Ship To/Due Date**, **Status**, **Supplier Information**, **Item Information**, **Attributes**, **Contract**, **Sourcing Controls**, and **WebIMS** (for WebIMS-related requisitions).

In addition, specific **Comments** or **Attachments** (specs, images, etc.) can be added by clicking the **Line Comments** icon. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

The screenshot displays the Cardinal Requisition Lines interface. The top navigation bar includes 'All', 'Search', and 'Advanced Search'. The breadcrumb trail shows 'Purchasing > Requisitions > Add/Update Requisitions'. The 'Maintain Requisitions' section is highlighted with a red box, and the 'Requisition' sub-section is also highlighted. The main form contains fields for Business Unit (50100), Requisition ID (NEXT), and Requisition Name. The '*WebIMS Req Type' is set to 'Regular', and the Status is 'Open'. The 'Header' section shows the Requester as 'GEORGE.MASON' and the Requisition Date as '01/15/2017'. The 'Amount Summary' shows a Total Amount of 50.00 USD. The 'Line' section is highlighted with a red box, and the 'WebIMS' tab is selected. The 'Line' table shows one line item with a quantity of 2.0000 and a price of 25.00000.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open



Requisition Lines (continued)

CARDINAL All Search [] Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT
Requisition Name [] Copy From Hold From Further Processing

Header

*Requester GEORGE.MASON MASON,GEORGE
*Requisition Date 01/15/2017 Requirer Info
Origin ONL Online Input
*Currency Code USD Dollar

Requisition Defaults Add Comments
Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requirer Items

Line

Personalize Find View All First 1 of 1 Last

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display



Requisition Lines (continued)

The **Line Comments** page allows entering comments, adding attachments, or access and using standard comments that are pre-loaded in the system. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

Line Comments

Business Unit 50100 Requisition Date 01/15/2017
Requisition ID NEXT Status Open Line 1

*Sort Method **Comment Time Stamp** *Sort Sequence **Ascending** Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

Use Item Specifications

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ 50100-NEXT

OK Cancel Refresh



Requisition Lines (continued)

Amount Only

The requested goods or services may be a single total amount and/or invoiced in different amounts (not quantities). Using the **Maintain Requisitions – Requisition** page, on the **Attributes** tab under the **Line** section, **Amount Only** may be selected. Requesting and ordering using **Amount Only** allows the line to be received only by invoiced amount (dollars) instead of by quantity.

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester GEORGE.MASON MASON,GEORGE
*Requisition Date 01/15/2017 Requester Info
Origin ONL Online Input
*Currency Code USD Dollar

Requisition Defaults Add Comments
Requisition Activities

Amount Summary ?

Total Amount 50.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requester Items

Line ? Personalize | Find | View All | First 1-2 of 2 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS			
Line	Item	Description	Buyer	Name	Physical Nature	Zero Price Indicator	Amount Only	Inspection Required	Inspect ID		
1	0051404115	ABRASIVES,	GEORGE.MASON	MASON,GEORGE	Goods	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		+ -	
2					Goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		+ -	

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display



Requisition Lines (continued)

Amount Only Example - We have a requisition for the installation of two storage units. Each unit will have a fixed price, but the supplier may bill for odd amounts during the project. **Amount Only** will allow you to receiving the actual invoice amount, instead of a percent of each storage unit.

When using the **Amount Only** checkbox:

- The **Quantity** is set to **1** for an amount only line and **Quantity** becomes unavailable for entry. The line is repriced accordingly.
- The **Price** field on the line is available for entry.
- The **Price** you enter becomes the schedule price and amount.
- The **Distribute By** field, located on the **Distribution** page, is set to **Amount** and cannot be modified.

Line ?										Personalize Find View All [Print] [Refresh]		First 1-2 of 2 Last										
Details										Ship To/Due Date		Status	Supplier Information		Item Information		Attributes	Contract	Sourcing Controls		WebIMS	
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status														
1	0051404115	ABRASIVES,	1.0000	RO	0051404	15.00000	15.00	Open														
2	0051417550	CLOTHS, ABRASIVE,	3.0000	PK	0051417	10.00000	30.00	Open														

To view the **Distribute By** field and ChartField distribution for a line, from the **Details** tab click the **Schedule** icon.



Requisition Lines (continued)

From the **Schedule** page click on the distribution icon.

CARDINAL All Search >> Advanced Search

[Favorites](#) > [Main Menu](#) > [Purchasing](#) > [Requisitions](#) > [Add/Update Requisitions](#)

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 01/15/2017
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line Find | View All First 1 of 2 Last
 1 Item 0051417548 CLOTHS, ABRASIVE, EMERY, 9 IN. Quantity 1.0000 Each Merchandise Amt 15.00 USD

Schedule Personalize | Find | View All | First 1 of 1 Last
[Details](#)

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	1.0000	15.00000	15.00		MASON, GEORC	Active

[Add Ship To Comments](#)
[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)



Requisition Lines (continued)

The **Distribute By** field, located on the **Distribution** pop-up window, is set to **Amount** and cannot be modified.

Distribution Details [X] Help

Maintain Requisitions
Distribution

Requisition ID NEXT Item 0051417548 CLOTHS, ABRASIVE, EMERY, 9 IN.
Line 1 Status Active
Schedule 1
Ship To CNTRL OFF3 CNTRL OFF3 Quantity 1.0000 EA
***Distribute By Amount** Open Amount 15.000
Merchandise Amt 15.00 USD
SpeedChart Multi-SpeedCharts

Distributions

Chartfields Details Asset Information [???

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	PC Bus Unit	Project	Activity
1	Open	100.0000	15.00	50100		5013540												

OK Cancel Refresh

Click **OK** to return to the **Schedule** page.



Requisition Schedules

The schedule information defines when and where the item is to be delivered and when it is due. On the **Schedule** page, the **Ship To** location should default per the user's set-up. These fields can be edited as necessary. Do not enter more than one schedule, i.e., **Ship To** location, for a line. The interface with eVA does not permit such an action and will cause the subsequent PO to error out. Create another line for each separate schedule required.

From the **Schedule** page, click the **Distribution** icon to enter accounting distributions.

CARDINAL All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 01/15/2017
Requisition ID NEXT Status Open

[Return to Main Page](#)

Line Find | View All First 1 of 2 Last

Line	Item	Description	Quantity	Unit	Merchandise Amt
1	0051417548	CLOTHS, ABRASIVE, EMERY, 9 IN.	1.0000	Each	15.00 USD

Schedule Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	1.0000	15.00000	15.00		MASON,GEORC	Active

Add Ship To Comments

Save Notify Refresh Add Update/Display



Requisition Schedules (continued)

A **Schedule** may have one or more **ChartField** distributions. The **ChartField** values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center**, or **Project** values are required. A ChartField value, can be manually entered or the **Multi-SpeedCharts** hyperlink, can be used to select a **SpeedChart** value to automatically populate some of the ChartField values for you.

Insert or delete additional accounting distributions by scrolling right and clicking on the +/- icons at the end of the accounting distribution line.

Distribution Details

Maintain Requisitions
Distribution

Requisition ID NEXT Item 0051417548 CLOTHS, ABRASIVE, EMERY, 9 IN.
Line 1 Status Active
Schedule 1
Ship To CNTRL OFF3 CNTRL OFF3 Quantity 1.0000 EA
*Distribute By Amount Open Amount 15.00
Merchandise Amt 15.00 USD
SpeedChart [Multi-SpeedCharts](#)

Distributions

Chartfields Details Asset Information

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS
1	Open	100.0000	15.00	50100		5012550	04100	699001	10003	11120010		

OK Cancel Refresh



Requisition Schedules (continued)

Add or delete a line using the +/- icons next to an existing line, and edit any part of the requisition. Once **Saved**, click the **Submit for Approval** checkbox, which is next to the **Status** field, to send it forward for approval by the Supervisor.

CARDINAL All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open X

Requisition ID 0002175955
Requisition Name 0002175955 Hold From Further Processing

Header ?

*Requester GEORGE.MASON MASON,GEORGE
*Requisition Date 01/15/2017 Requester Info
Origin ONL Online Input
*Currency Code USD Dollar

Requisition Defaults Add Comments
Requisition Activities
Document Status

Amount Summary ?
Total Amount 15.00 USD

Add Items From ?
Purchasing Kit Catalog
Item Search Requester Items

Select Lines To Display ?
Search for Lines
Line To Retrieve

Line ? Personalize Find View All First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS				
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	0051417548	CLOTHS, ABRASIVE	1.0000	EA	0051417	15.00000	15.00	Open				

View Approvals *Go to ...More...
Save Return to Search Notify Refresh Add Update/Display



Simulation: Creating a Regular Requisition

You will now view a simulation that demonstrates how to **Create a Regular Requisition**.

Click on the icon below to start the simulation.





Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.



On a requisition, a line cannot have multiple distributions.

- True
- False

The **Amount Only** function sets the line quantity to 1 and allows you to enter a dollar value.

- True
- False



Lesson 2: Summary

2

Understanding Requisitions

In this lesson, you learned:

- Create a regular requisition using the Purchasing module
- Search for items to add to the requisition in the Purchasing module
- Modify requisitions schedules in the Purchasing module
- Update accounting distributions in the Purchasing module



Lesson 3: Introduction

3

Creating an eProcurement Requisition

This lesson covers the following topics:

- Create an eProcurement Requisition
- Create and Use an eProcurement Template



Create an eProcurement Requisition

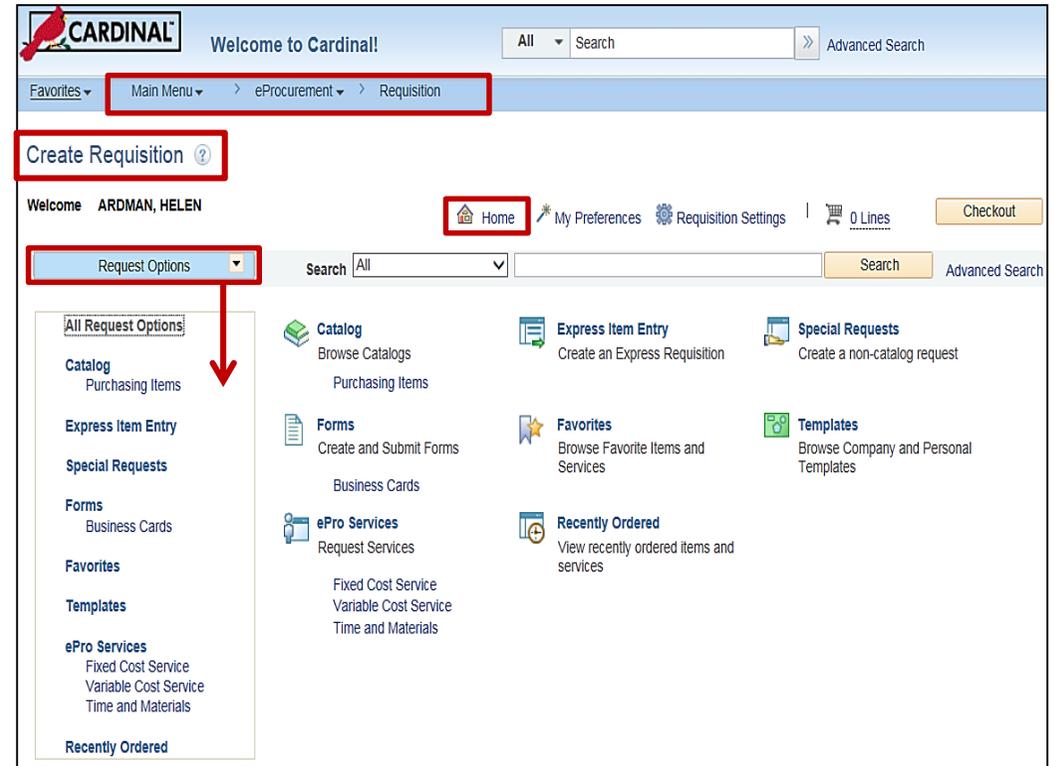
eProcurement provides a custom navigation center that contains folders which support procurement activities specific to business processes and tasks. eProcurement mimics an online shopping experience.

eProcurement may be used for a regular requisition but is not used for IMS (inventory).

Main Menu > eProcurement > Requisition

Click on the **Request Options** drop-down arrow to view left hand navigation. The navigation and options in the left hand navigation vary by page.

The **Create Requisition** page may also be accessed from any eProcurement page using the **Home** hyperlink which is displayed at the top of every eProcurement page.





Create an eProcurement Requisition: Defaults

The first step in creating an eProcurement requisition is to define the default **Requisition Settings**.

Click on the **Requisition Settings** pop-up window to define or confirm the **Business Unit**, **Requester**, **Requisition Name**, **Priority** of the requisition, **Line Defaults**, and **Shipping Defaults**.

Additional default settings include:

- **Line Defaults**
- **Shipping Defaults** - Confirm the **Ship To** location is correct for this requisition. This may also be done by line during checkout.
- **Distribution Defaults** - Accounting Defaults

The screenshot shows the 'Create Requisition' dialog box in the CARDINAL system. The dialog is titled 'Create Requisition' and is open to the 'Requisition Settings' tab. The user is identified as ARDMAN, HELEN. The 'Business Unit' is set to 50100 (VA Dept of Transportation) and the 'Requester' is PPS1_HELEN.ARDMAN. The 'Requisition Name' field is empty, and the 'Priority' is set to Medium. The 'Default Options' section has 'Default' selected. The 'Line Defaults' section includes fields for Supplier, Supplier Location, Buyer, Category, and Unit of Measure. The 'Shipping Defaults' section has 'Ship To' set to CNTRL OFF3. The 'Distribution Defaults' section includes a 'SpeedChart' field. The 'Accounting Defaults' section shows a table with columns for Dist, Percent, Location, GL Unit, Entry Event, Account, Fund, Program, Department, and Cost Center. The table contains one row with values: 1, [empty], CNTRL OFF3, 50100, [empty], [empty], [empty], [empty], [empty], [empty]. The dialog has 'OK' and 'Cancel' buttons at the bottom.



Create an eProcurement Requisition: Defaults (continued)

The **Accounting Defaults** are defined on the **Requisition Settings** pop-up window.

Default Options (Radio Buttons):

- **Default** - As long as no predefined values exist, the values entered in the Line, Shipping, and Distribution default fields replace blank fields and are applied to the entire requisition.
- **Override** - If predefined values exist, the value entered in the Line, Shipping, and Distribution default fields will override the default value for this requisition. However, blank values are not considered an override value and the system will still use the default value on the requisition.

The **Override** radio button enables the SpeedChart option.

The screenshot shows the 'Create Requisition' window with the following sections highlighted in red:

- Requisition Settings**: Business Unit (50100), VA Dept of Transportation, Requisition Name, Requester (PPS1_HELEN.ARDMAN), ARDMAN, HELEN, Priority (Medium), *Currency (USD).
- Default Options**: Radio buttons for 'Default' and 'Override' (selected). The 'Override' option is selected, indicating that predefined values will be used where available.
- Shipping Defaults**: Ship To (CNTRL OFF3), Due Date, Attention, and Add One Time Address.
- Distribution Defaults**: SpeedChart, Chartfields1, Details, Asset Information, and a table of accounting defaults.

Dist	Percent	Location	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	100.0000	CNTRL OFF3	50100		5012550	04100	899001	10003	11120010

At the bottom, the 'OK' and 'Cancel' buttons are also highlighted in red.



Create an eProcurement Requisition: Defaults (continued)

Accounting Defaults: On the **ChartFields 1** define the default accounting values to be applied to all requisition lines. Later, at checkout, if needed, an individual line can be modified or accounting values can be defined.

Click the **OK** button to accept the edits, close the pop-up window, and return to the **Create Requisition** page.

Requisition Settings

Business Unit: 50100 VA Dept of Transportation Requisition Name: []
Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN Priority: Medium
*Currency: USD

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier: [] Category: []
Supplier Location: [] Unit of Measure: []
Buyer: []

Shipping Defaults

Ship To: CNTRL OFF3 Add One Time Address
Due Date: [] Attention: []

Distribution Defaults

SpeedChart: []

Accounting Defaults Personalize | Find | [] | [] First 1 of 1 Last

Chartfields1 Details Asset Information []

Diet	Percent	Location	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	100.0000	CNTRL OFF3	50100	[]	5012550	04100	899001	10003	11120010

OK Cancel

Click on image to enlarge



Add Items and Services

The second step in creating an eProcurement requisition is adding items and services. This can be done from the eProcurement **Home** page, i.e., **Create Requisitions** page, using the main page or the left hand navigation hyperlinks.

From the **Create Requisition** page, search for items or services to add to the shopping cart by clicking on one of the following hyperlinks or using the main search feature at the top of the page:

- **Catalog**
- **Express Item Entry**
- **Favorites**
- **Recently Ordered**
- **Special Requests**

The screenshot displays the 'Create Requisition' page in the Cardinal eProcurement system. The breadcrumb trail is 'Main Menu > eProcurement > Requisition'. The 'Create Requisition' link is highlighted. The search bar at the top right is set to 'All'. The central grid of options includes: 'Catalog' (Browse Catalogs, Purchasing Items), 'Express Item Entry' (Create an Express Requisition), 'Special Requests' (Create a non-catalog request), 'Favorites' (Browse Favorite Items and Services), and 'Recently Ordered' (View recently ordered items and services). The left-hand navigation menu lists 'Request Options' with sub-items: 'Catalog' (Purchasing Items), 'Express Item Entry', 'Special Requests', 'Forms' (Create and Submit Forms, Business Cards), 'ePro Services' (Request Services, Fixed Cost Service, Variable Cost Service, Time and Materials), 'Favorites', 'Templates' (Browse Company and Personal Templates), and 'Recently Ordered'.



Add Items and Services: Searches

At the top of the page is a global search option. Using the drop down arrow, choose to search the **Catalog**, your **Favorites**, or everywhere (**All**). Click on the **Advanced Search** hyperlink and a pop-up window with additional search criteria will be displayed. To initiate a search, type the item number or name in the box to the left of the **Search** button or in the search criteria on the pop-up window. Click the **Search** button to kick off the search.

The % character can be used as a wildcard in global searches preceded by another character.

Home My Preferences Requisition Settings 0 Lines Checkout

Search All 3204%38% Search Advanced Search

Filter by

Item Category
NUTS, JAM, STEEL (11)

NUT, STEEL, HEX HEAD, FUL...(1)

NUTS, FINISHED, MEDIUM CA...(1)

NUTS, HEX, ZINC PLATED ST...(1)

NUTS, MACHINE SCREW, BRAS...(1)
More...

Manufacturer Name
No Value (18)

Supplier Name
Noelco Inc (17)
No Value (1)

Preferred Supplier
Yes (17)
No (1)

Search "3204%38%"
Catalog - 18 results returned.

Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

*Sort By Description

Catalog Search Results

NUTS, FINISHED, MEDIUM CARBON STEEL, REGULAR, DOUBLE CHAMFER 1 IN. - 8

Item ID 3204228381 Price 0.0100 USD UOM Hundred Supplier Noelco Inc Supplier ID 0000018117 Manufacturer

Quantity Add Add to Favorites Add to Template(s)

NUTS, JAM, STEEL 1 IN. S.A.E., TIFCO NO. 22-147 OR EQUAL

Item ID 3204238140 Price 0.0100 USD UOM Hundred Supplier Noelco Inc Supplier ID 0000018117 Manufacturer

Advanced Search

Search Name Search Save Search Criteria Help

Advanced Item Search Search Tips

Search Contains All of the following search fields entered.

Description Contains Any

Manufacturer Contains Any

Manufacturer ID Contains Any

Supplier Contains Any

Supplier ID Contains Any

Item ID Contains Any 3204% x

Model Contains Any

GTIN Contains Any

Category ID Contains Any

Supplier Item ID Contains Any

Manufacturer Item ID Contains Any

Category Contains Any

Price Range: From To In USD

Search

Search By Contract ID

Contract Contract Search

Clear Cancel

Click on the **Home** icon and then the **Express Item Entry** hyperlink.



Add Items and Services: Express Item Entry

If the **Item ID** number is known, for the item or service, enter it in the **Item ID** field and the rest of the information will auto populate. Or, search for the **Item ID** using the magnifying glass icon.

To add an item or service to the shopping cart:

- Enter the **Item ID**.
- Enter the **Quantity** you wish to order.
- To add additional items using **Express Item Entry**, click the add new row (+) icon to the right of the first item.
- When all items and services have been entered, click on the **Add to Cart** button.
- To add additional item(s) to the requisition using another method, e.g., **Special Requests**, click on the **Home** icon or use the left hand navigation. Click on the **Add to Cart** button.

The screenshot displays the Cardinal eProcurement interface. At the top, there is a navigation bar with 'Main Menu > eProcurement > Requisition' highlighted. Below this, a 'Create Requisition' button is visible. The user's name 'ARDMAN, HELEN' and a 'Home' icon are shown. A search bar is present with 'Request Options' and 'Search' buttons. The main content area features a sidebar with 'All Request Options' and a table of requisition lines. The 'Express Item Entry' section is highlighted, showing a table with columns for 'Item ID', 'Description', 'Quantity', 'UOM', 'Category', 'Price', and 'Merchandise Amount'. Three rows of items are listed, with the first row's 'Item ID' and 'Quantity' fields highlighted. A '+' icon is visible to the right of the first row. At the bottom, an 'Add to Cart' button is highlighted.

Item ID	Description	Quantity	UOM	Category	Price	Merchandise Amount	
0051404000	ABRASIVES, PLASTONE ABRASIVES, PLASTONE	500.0000	EA	0051404	0.0100	5.00 USD	+
2 0051410000	ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE	2000.0000	EA	0051410	0.0100	20.00 USD	+
3 3052860018	POINTERS AND PARTS, LEAD ABRASIVE REFILL CUPS, SUITABLE FOR SHARPENING GRAPHITE AND P	300	EA	3052860	0.0100	USD	+



Add Items and Services: Express Item Entry (continued)

Once the items are added to the shopping cart using **Express Item Entry**, the **Express Item Entry** page is still displayed and the shopping cart **Lines** indicator is updated to reflect the total number of lines in the cart.

Any time the shopping cart icon is displayed hover over it, or click on it, to view the items in the cart. Once clicked, the cart contents will be displayed on the right hand side of the screen along with navigation to **Checkout**.

After all items have been added to your requisition, use the **Checkout** button to review the requisition contents, make final adjustments, modify accounting distributions, update shipping details, or add last-minute items. From the **Checkout – Review and Submit** page you will also submit your requisition for approval.

Click on one of the **Checkout** buttons.

The screenshot displays the Cardinal eProcurement interface. The breadcrumb trail is: Home > Main Menu > eProcurement > Requisition. The 'Express Item Entry' button is highlighted in the left sidebar. The main content area shows a table with one line item:

Line	Item ID	Description	Quantity	UOM	Ca
1					

Below the table is an 'Add to Cart' button. A '3 Lines' indicator is visible above the table. The 'Checkout' button is highlighted in the top right of the main area. A 'Shopping Cart' overlay is open on the right, showing the following items:

Description	Qty	UOM
ABRASIVES, PLASTONE ABRAS...	500	EA
ABRASIVES, SILICON CARBID...	2000	EA
POINTERS AND PARTS, LEAD ...	300	EA

The shopping cart summary shows: Total Lines 3, Total Amount (USD) 28.00. A 'Checkout' button is highlighted in the bottom right of the shopping cart overlay.



Checkout - Review and Submit

On the **Checkout – Review and Submit** page the requisition can be saved and submitted for approval immediately or saved to be completed later. Additionally, you can edit or add requisition items and accounting distribution details, as well as modify shipping details or add comments and attachments. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course. A justification comment can be added and is sent with the approval .

Checkout – Review and Submit Page Sections:

Requisition Summary - Confirm the information is accurate and update if needed.

Checkout - Review and Submit
Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 50100 VA Dept of Transportation Requisition Name:

Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN Priority: Medium

*Currency: USD

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00			
2	ABRASIVES, SILICON CARBIDE (CA	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00			
3	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00			

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 28.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location: CNTRL OFF3
Address: VDOT Central Office
1221 E. Broad St.
Richmond, VA 23219
Attention To: ARDMAN, HELEN



Checkout - Review and Submit: Requisition Lines

Requisition Lines: Displays information about each requisition line:

- **Add More Items** - Click on the button to add more items to the requisition. The **Create Requisition** page will open and the user can search and select additional items to be added to the shopping cart.
- **Line Details** icon - Click to access the **Line Details** pop-up window, to modify additional line details, such as the buyer, supplier, and other line-specific information.
- **Expand** triangle icon - Expand a row to view or change line shipping and accounting information, specific to the expanded line.
 - Confirm or update the **Ship To** location for each line. Use the magnifying glass icon to search for a different shipping location.

Click on the **Expand** triangle icon for a line.

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	800.0000	Each	0.0100	5.00		Add	
Shipping Line 1		* Ship To: CNTRL OFF3		Quantity	800.0000					
		Address: VDOT Central Office 1221 E. Broad St. Richmond, VA 23219		Add One Time Address	Price	0.0100		Price Adjustment	Pegging Inquiry	Pegging Workbench
		Attention To: ARDMAN, HELEN								
		Due Date: <input type="text"/>								
Accounting Lines										
		*Distribute By: Qty		SpeedChart <input type="text"/>						
Accounting Lines										
Personalize Find View All First 1 of 1 Last										
Chartfields 1	Chartfields 2	Details	Details 2	Asset Information	Asset Information 2					
Line	Status	Dist Type	*Location	Quantity	%Percent	Merchandise Amt	GL Unit	Entry Event		
1	Open		CNTRL OFF3	800.0000	100.0000	5.00	EQ100			
2	ABRASIVES, SILICON CARBIDE (CA)	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00		Add	
3	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 28.00 USD

Click the image to enlarge



Checkout - Review and Submit: Requisition Lines (continued)

- **Accounting Lines:** Click on the **Expand** triangle icon next to a line to view the accounting distribution details for the line.
 - Add/delete accounting distribution lines using the +/- icons. If there is more than one line, be sure to indicate the percentage of the total requisition line that should go to each accounting distribution line on the **ChartFields 1** tab. The total must equal 100%.
 - On the **ChartFields 2** tab, enter or modify the ChartField distribution for each line.
 - A SpeedChart may be used as well.

The screenshot displays a requisition line interface. At the top, it shows a 'Cart Summary: Total Amount 28.00 USD' and an 'Add More Items' button. Below this is the 'Requisition Lines' section, which includes a table of requisition lines and shipping details. The 'Accounting Lines' section is expanded, showing a 'Distribute By' dropdown set to 'Qty' and a 'SpeedChart' dropdown. Below the 'Accounting Lines' section, there are two tabs: 'Chartfields1' and 'Chartfields2'. The 'Chartfields1' tab is active, showing a table with columns for Line, Status, Dist Type, Location, Quantity, and Percent. The 'Chartfields2' tab is also visible, showing a table with columns for Account, Fund, Program, Department, Cost Center, Task, FIPS, Asset, Agency Use 1, Agency Use 2, and PC Bus Uni.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00			

Line	Status	Dist Type	*Location	Quantity	Percent
1	Open		CNTRL OFF3	375.0000	75.0000
2	Open		CNTRL OFF3	125.0000	25.0000

Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	PC Bus Uni
5012550	04100	699001	10003	111200						
5012550	04100	699001	10004	111200						



Checkout - Review and Submit: Requisition Lines (continued)

- **Accounting Lines** - Another option for updating all the accounting lines during checkout is to use the **Requisitions Settings** hyperlink at the top of the page. Select the **Override** radio button, enter the accounting distribution changes, and click on the **OK** button. A pop-up window will appear. Select a **Distribution Change Option** and click the **OK** button.

The screenshot shows the 'Checkout - Review and Submit' interface. At the top, the 'Requisition Summary' section includes 'My Preferences' and 'Requisition Settings' (highlighted with a red box). Below this is the 'Requisition Settings' form with fields for Business Unit (50100), Requester (PPS1_HELEN.ARDMAN), and Currency (USD). The 'Default Options' section has the 'Override' radio button selected. Below that is the 'Accounting Defaults' table with columns for Dist, Percent, Location, GL Unit, Entry Event, Account, Fund, and Program. A red box highlights the 'OK' button at the bottom left. A 'Distribution Change Options' pop-up window is overlaid on the right, with a red arrow pointing to the 'All Distribution Lines' radio button. The pop-up window contains the following text: 'For the selected requisition lines that are available for sourcing, apply distribution changes to'. The options are: 'All Distribution Lines' (selected), 'Matching Distribution Lines', and 'Replace Distribution Lines'. The 'OK' and 'Cancel' buttons are at the bottom of the pop-up.

Dist	Percent	Location	GL Unit	Entry Event	Account	Fund	Program
1	75.0000	CNTRL OFF3	50100		5012550	04000	
2	25.0000	CNTRL OFF3	50100		5012550	04100	



Checkout - Review and Submit: Requisition Lines (continued)

From the **Checkout** page, click on the **Line Details** icon to the right of the line to be updated/reviewed.

The **Line Details** pop-up window displays to permit viewing/modifying requisition line details for the item selected, including:

- **Items Details**
- **Contract Information**
- **Supplier Information**
- **Manufacturer Information**
- **Sourcing Controls**

Click the **OK** button after reviewing and updating is complete. The **Checkout – Review and Submit** page will be active again.



Checkout - Review and Submit: Requisition Lines (continued)

- **Add to Favorites:**
 - Place a checkmark on the item lines purchased on a regular basis and wish to appear in the **Favorites** list for quick and easy reorders. Place a checkmark in the **Select All/Deselect All** checkbox to select/deselect all the lines.
 - Click on the **Add to Favorites** hyperlink. A pop-up window will appear to confirm the addition(s) to your list of favorites.
 - Click the **OK** button to confirm.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 50100 VA Dept of Transportation Requisition Name: []

Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN Priority: Medium

*Currency: USD

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete	
<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00				
Shipping Line 1				*Ship To: CNTRL OFF3	Quantity: 500.0000	Price: 0.0100					
				Add One Time Address							
				Address: VDOT Central Office, 1221 E. Broad St., Richmond, VA 23219							
				Attention To: ARDMAN, HELEN							
				Due Date: []							
Accounting Lines				*Distribute By: Qty	SpeedChart: 11120010						
Accounting Lines											
Chartfield1	Chartfield2	Details	Details 2	Asset Information	Asset Information 2						
Account	Fund	Program	Department	Cost Center	Task	FIPs	Asset	Agency Use 1	Agency Use 2	PC Bus Unit	Project
5022830	04100	699001	10080	111200							
<input checked="" type="checkbox"/>	ABRASIVES, SILICON CARBIDE (CA)	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00				
<input checked="" type="checkbox"/>	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00				

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00
<input checked="" type="checkbox"/>	ABRASIVES, SILICON CARBIDE (CA)	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00
<input checked="" type="checkbox"/>	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Confirmation

The following item(s) will be added to your favorites:

ABRASIVES, PLASTONE ABRASIVES, PLASTONE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE POINTERS AND PARTS, LEAD ABRASIVE REFILL CUPS, SUITABLE FOR SHARPENING GRAPHITE AND P

Do not show this message again

OK Cancel



Checkout - Review and Submit (continued)

- **Shipping Summary:** Click the **Edit for All Lines** hyperlink to modify the shipping details or accounting lines for the entire requisition.
- **Requisition Comments:** Enter comments and select the appropriate checkbox to determine who will see the comments.
- **Approval Justification:** Enter comments to be viewed by requisition approvers and reviewers during the approval process.
- Choose **Save for Later**, and the **Requisition Name** and **Requisition ID** are automatically populated upon save.
- Click the **Save & submit** button to submit the requisition for approval, budget checking, and fulfillment. The **Requisition Name** and **Requisition ID** are automatically populated upon save.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 50100 VA Dept of Transportation

Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN

*Currency: USD

Requisition Name: []

Priority: Medium

Cart Summary: Total Amount 28.00 USD

Shipping Summary

[Edit for All Lines](#)

To Location: CNTRL OFF3

Address: VDOT Central Office
1221 E. Broad St.
Richmond, VA 23219

Attention To: ARDMAN, HELEN

Requisition Comments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Save & submit Save for Later Add More Items Preview Approvals

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 50100 VA Dept of Transportation

Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN

*Currency: USD

Requisition Name: 0002175952

Requisition ID: 0002175952

Priority: Medium



Checkout: Confirmation

Once the **Save and submit** has processed, a **Confirmation** page appears that displays details about your requisition and its current disposition, including:

- **Requisition Name** - Defaults to the Requisition ID number if the field was not completed during the creation of the requisition.
- **Requisition ID** number - Auto generated sequential number.

Use the **Edit This Requisition** hyperlink to modify the requisition.

Workflow approval routing is also displayed. Click on the **Multiple Approvers** hyperlink to view additional routing details.

Use the **Manage Requisitions** hyperlink to access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, create change requests, copy requisition, view approvals, or return stock to the supplier.

The screenshot displays the 'Confirmation' page in the Cardinal eProcurement system. The page header includes the Cardinal logo, 'Welcome to Cardinal!', a search bar, and navigation menus. The main content area shows a confirmation message and details for Requisition 0002175952. The details include: Requested For ARDMAN, HELEN; Requisition Name 0002175952; Requisition ID 0002175952; Business Unit 50100; Status Pending; Priority Medium; Number of Lines 3; Total Amount 28.00 USD. The page also features a 'Confirmation' tab, a 'View printable version' link, and an 'Edit This Requisition' link. Below the main details, there are two sections for workflow approval routing: 'Req for Supervisor Action' showing 'Requester's Supervisor' as 'MCCRACKEN, STACY' with a 'Pending' status, and 'Req for Procurement Mgr Action' showing 'Procurement Manager' as 'Not Routed' with a 'Multiple Approvers' link. At the bottom, there are links for 'Apply Approval Changes', 'Create New Requisition', and 'Manage Requisitions'.



Add Catalog Items

To search for and add items that are included in the catalog to the requisition, click on the **Catalog** or **Purchasing Items** hyperlink.

The screenshot displays the Cardinal eProcurement system interface. At the top, the logo and 'Welcome to Cardinal!' are visible. A navigation breadcrumb shows 'Main Menu > eProcurement > Requisition', with 'Main Menu' and 'eProcurement' highlighted in red. Below this, a 'Create Requisition' button is also highlighted in red. The user's name 'ARDMAN, HELEN' and a 'Checkout' button are shown. A search bar is present with 'All' selected. The main content area features a 'Request Options' dropdown and a search bar. A grid of options is displayed, with the 'Catalog' option (containing 'Browse Catalogs' and 'Purchasing Items') highlighted in a red box. Other options include 'Express Item Entry', 'Special Requests', 'Forms', 'Favorites', 'Templates', and 'Recently Ordered'. A sidebar on the left lists 'All Request Options' and sub-categories like 'Catalog', 'Express Item Entry', 'Special Requests', 'Forms', 'Favorites', 'Templates', 'ePro Services', and 'Recently Ordered'.



Add Catalog Items (continued)

Filter the search results of the items available using the left side navigation menu. Click on a category to view all the items in the selected category.

Left Navigation Menu

Create Requisition

Request Options

Search [Catalog]

Filter by

Browse Catalogs > All Categories: **ABRASIVES**

Catalog Search Results

Item ID	Price	UOM	Quantity	Add
0051418040	0.0100 USD	Roll	15.0000	Add
0051418040	0.0100 USD	Roll		Add
0051418030	0.0100 USD	Roll		Add
0051418030	0.0100 USD	Roll		Add

Add an item to the order::

- Click on the box to the left of the item description to select the item.
- Update the **Quantity** field with the number of items desired.
- Click on the **Add** button to add the item(s) to the shopping cart.
- Click on the **Checkout** button to continue to process the requisition as shown on the previous pages.



Add Catalog Items (continued)

Create Requisition ?

Welcome ARDMAN, HELEN

Home My Preferences Requisition Settings 4 Lines Checkout

Request Options Search Catalog Search Advanced Search

Filter by

Category Path

- ABRASIVES, COATED: CLOT..(737)
- ABRASIVES, SOLID: WHEEL..(208)
- ABRASIVES, SANDBL...(OTHER) (33)
- STEEL WOOL, ALUMINUM WOO...(28)
- ABRASIVES, SANDBLASTING...(11)
More...

Item Category

- WHEELS, ABRASIVE GRINDIN...(69)

Browse Catalogs > All Categories> **ABRASIVES**

Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

*Sort By Description

Catalog Search Results ? Find First 1-50 of 50 Last

<input checked="" type="checkbox"/>	CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 240 GRIT	Item ID 0051418040 Price 0.0100 USD UOM Roll	Supplier KPK CORP Supplier ID 0000052945 Manufacturer	Quantity <input type="text" value="15.0000"/> Add	Add to Favorites Add to Template(s)
<input type="checkbox"/>	CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 240 GRIT	Item ID 0051418040 Price 0.0100 USD UOM Roll	Supplier E & M Auto Paint and Supply Corp Supplier ID 0000034153 Manufacturer	Quantity <input type="text"/> Add	Add to Favorites Add to Template(s) ★ Preferred
<input type="checkbox"/>	CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 80 GRIT	Item ID 0051418030 Price 0.0100 USD UOM Roll	Supplier E & M Auto Paint and Supply Corp Supplier ID 0000034153 Manufacturer	Quantity <input type="text"/> Add	Add to Favorites Add to Template(s) ★ Preferred
<input type="checkbox"/>	CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 80 GRIT				

Create Requisition ?

Welcome ARDMAN, HELEN

Home

Request Options Search Catalog

All Request Options

- Catalog
- Purchasing Items**
- Express Item Entry
- Special Requests
- Forms
Business Cards
- Favorites
- Templates
- ePro Services
Fixed Cost Service
Variable Cost Service
Time and Materials
- Recently Ordered

Catalog ?

- Purchasing Item
- ABRASIVES**
- ACOUSTICAL TILE, INSULATING MA
- ADDRESSING, COPYING, MIMEOGRA
- AGRICULTURAL CROPS AND GRAINS
- AGRICULTURAL EQUIPMENT, IMPL
- AGRICULTURAL EQUIPMENT AND IMP
- AIR COMPRESSORS AND ACCESSORIE
- AIR CONDITIONING, HEATING, AND
- AIRCRAFT AND AIRPORT, EQUIPMEN
- More...



Add Special Requests

To add items or goods to the requisition that are not included in the catalog of items and have no item ID, use the **Special Requests** page. A special request can be submitted for goods or services.

Click on the **Special Requests** hyperlink.

The screenshot displays the Cardinal eProcurement system interface. At the top, there is a header with the Cardinal logo, the text "Welcome to Cardinal!", and a search bar. Below the header, a navigation menu shows "Main Menu" > "eProcurement" > "Requisition". The "Create Requisition" link is highlighted with a red box. The main content area shows a grid of options: "Catalog", "Express Item Entry", "Special Requests" (highlighted with a red box), "Forms", "Favorites", and "Templates". The "Special Requests" option is described as "Create a non-catalog request".



Add Special Requests (continued)

On the **Special Requests** page, complete the following sections, if applicable:

- **Item Details** - Add an item not in the catalog. An * indicates a required field.
- **Supplier** - Preferred supplier, information should be entered here.
- **Manufacturer** - Preferred manufacturer information is entered here.
- **Additional Information** - Add comments the buyer should see.

Request New Item - Select this check box to request that the item be added to the item master. A request new item worklist notification is sent.

Add to Cart - Click this button to add the special item just entered to the requisition.

Continue to process the requisition as shown on the previous pages.

The screenshot shows the 'Create Requisition' page in the CARDINAL system. The 'Special Requests' section is highlighted with a red border. It contains the following fields and options:

- Item Details:** *Item Description, *Price, *Quantity, *Category, *Currency (USD), *Unit of Measure, Due Date.
- Supplier:** Supplier ID, Supplier Name, Supplier Item ID, Suggest New Supplier.
- Manufacturer:** Mig ID, Manufacturer, Mig Item ID.
- Additional Information:** A text area for comments and checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'.
- Request New Item:** A checkbox labeled 'Request New Item' with the text 'A notification will be sent to a buyer regarding this new item request.'
- Add to Cart:** A button at the bottom of the highlighted section.



Add eProcurement Services

From the **Create Requisition** page, click on one of the **ePro Services** hyperlinks:

- **Fixed Cost Service** - This is a service with a fixed fee and is not part of the item catalog.
- **Variable Cost Service** - This is a service that is based on the number of hours of work.
- **Time and Materials** - Used to request a service that is based on time worked and materials used.

WELCOME TO CARDINAL! Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu > eProcurement > Requisition

Create Requisition ?

Welcome ARDMAN, HELEN Home My Preferences Requisition Settings 1 Line Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**
Browse Catalogs
Purchasing Items
- Express Item Entry**
Create an Express Requisition
- Special Requests**
Create a non-catalog request
- Forms**
Create and Submit Forms
Business Cards
- Favorites**
Browse Favorite Items and Services
NUTS, JAM, STEEL 1-1/4 IN. S...
ABRASIVES, PLASTONE ABRASIVE...
ABRASIVES, SILICON CARBIDE (...
POINTERS AND PARTS, LEAD ABR...
- Templates**
Browse Company and Personal Templates
Test Template
- Recently Ordered**
View recently ordered items and services

ePro Services
Request Services

- Fixed Cost Service
- Variable Cost Service
- Time and Materials



Add eProcurement Services (continued)

Enter the details and click on the **Add to Cart** button.

Continue to process the requisition as shown on the previous pages.

Fixed Cost Service

*Service Description

*Value of Service *Currency

*Category

Supplier ID Suggest New Supplier

Supplier Name

Start Date

End Date

Quote Number

Time and Materials

*Service Description

*Number of Units of Work *Unit of Work

*Rate *Currency

*Category

Supplier ID

Supplier Name Suggest New Supplier

Beginning Date Date of completion

Quote Number Quote Date

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Variable Cost Service

*Service Description

*Number of Units of Work *Unit of Work

*Rate *Currency Code

*Category

Supplier ID Suggest New Supplier

Supplier Name

Quote Number Quote Date

Beginning Date Date of Completion

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

Item Description

*Quantity *Unit of Measure

*Price *Currency

*Category

Supplier ID

Supplier Name Suggest New Supplier

Supplier Item ID

Manufacturer ID

Manufacturer

Mfg Item ID

Start Date End Date

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart



Simulation: Creating a Requisition from eProcurement

You will now view a simulation that demonstrates how to **Create a Regular Requisition**.

Click on the icon below to start the simulation.





Create a Personal Template

Create a personal eProcurement requisition template using data from an existing requisition. This allows creation of new requisitions in eProcurement that are pre-populated with the data saved on the template, thus eliminating some data entry. Once a requisition is created from the template, it can be modified.

To create an eProcurement requisition template, navigate to the **Manage Requisitions** page using the following path:

Main Menu > eProcurement > Manage Requisitions

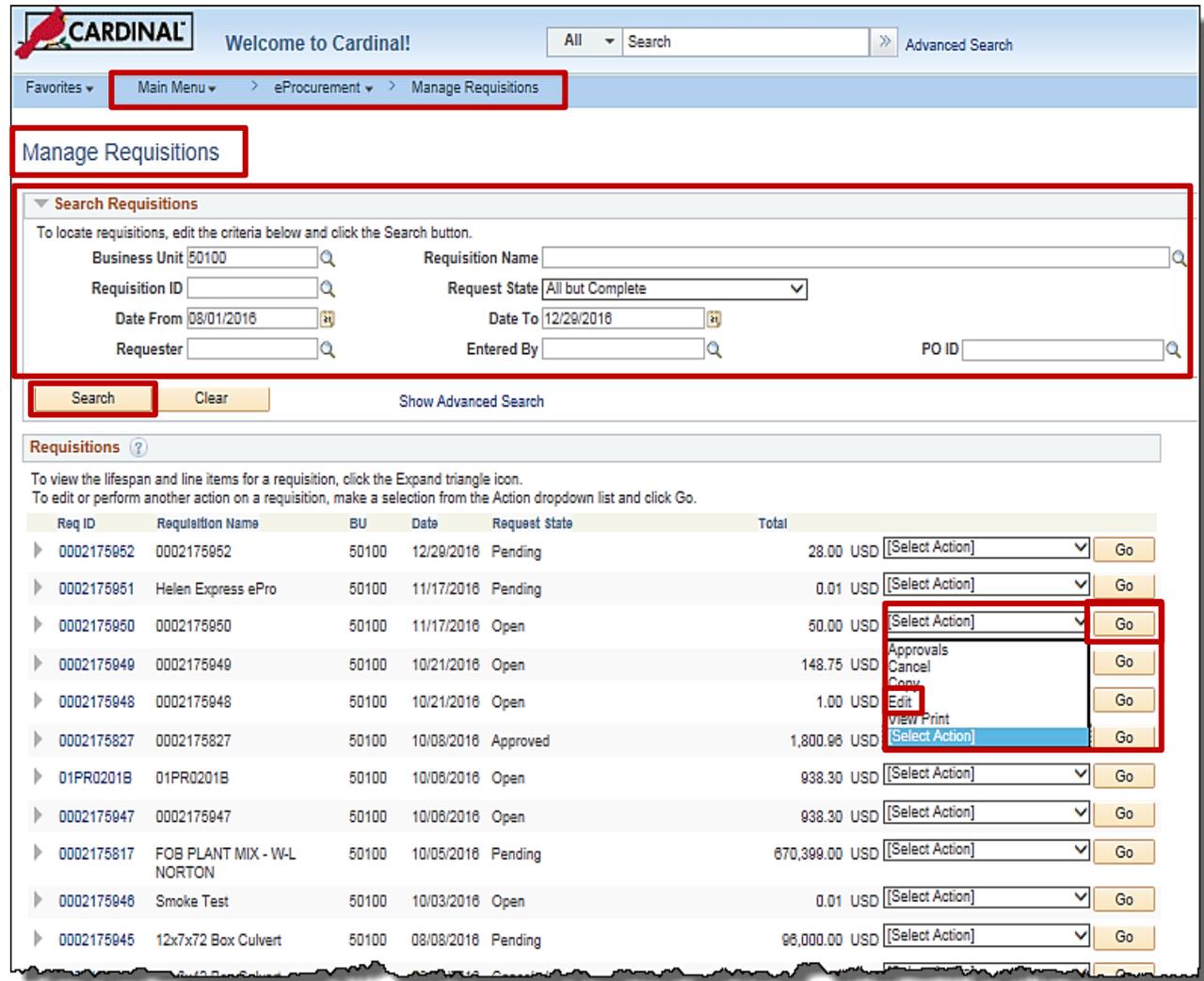
- **Business Unit** defaults.
- If you know the **Requisition ID** to create your template from, enter it here.
- Set the **Request Status** to **All but Complete**.

The screenshot shows the 'Manage Requisitions' page in the Cardinal system. The search form is highlighted with a red box, and the 'Edit' option in the dropdown menu for the requisition with ID 0002175948 is also highlighted with a red box.

Req ID	Requisition Name	BU	Date	Request state	Total	
0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD	[Select Action] Go
0002175951	Helen Express ePro	50100	11/17/2016	Pending	0.01 USD	[Select Action] Go
0002175950	0002175950	50100	11/17/2016	Open	50.00 USD	[Select Action] Go
0002175949	0002175949	50100	10/21/2016	Open	148.75 USD	Approvals Cancel Copy Go
0002175948	0002175948	50100	10/21/2016	Open	1.00 USD	Edit View Print [Select Action] Go
0002175827	0002175827	50100	10/08/2016	Approved	1,800.96 USD	[Select Action] Go
01PR0201B	01PR0201B	50100	10/08/2016	Open	938.30 USD	[Select Action] Go
0002175947	0002175947	50100	10/08/2016	Open	938.30 USD	[Select Action] Go
0002175817	FOB PLANT MIX - WL NORTON	50100	10/05/2016	Pending	670,399.00 USD	[Select Action] Go
0002175946	Smoke Test	50100	10/03/2016	Open	0.01 USD	[Select Action] Go
0002175945	12x7x72 Box Culvert	50100	08/08/2016	Pending	98,000.00 USD	[Select Action] Go

Create a Personal Template (continued)

- Click on the **Search** button.
- Select a requisition from the search results.
- On the **Select Action** drop-down next to the selected requisition, select **Edit**.
- Click on the **Go** button. The **Edit Requisition – Review and Submit** page will display.



Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 50100 Requisition Name: _____
Requisition ID: _____ Request State: All but Complete
Date From: 08/01/2016 Date To: 12/29/2016
Requester: _____ Entered By: _____ PO ID: _____

Search Clear Show Advanced Search

Requisitions

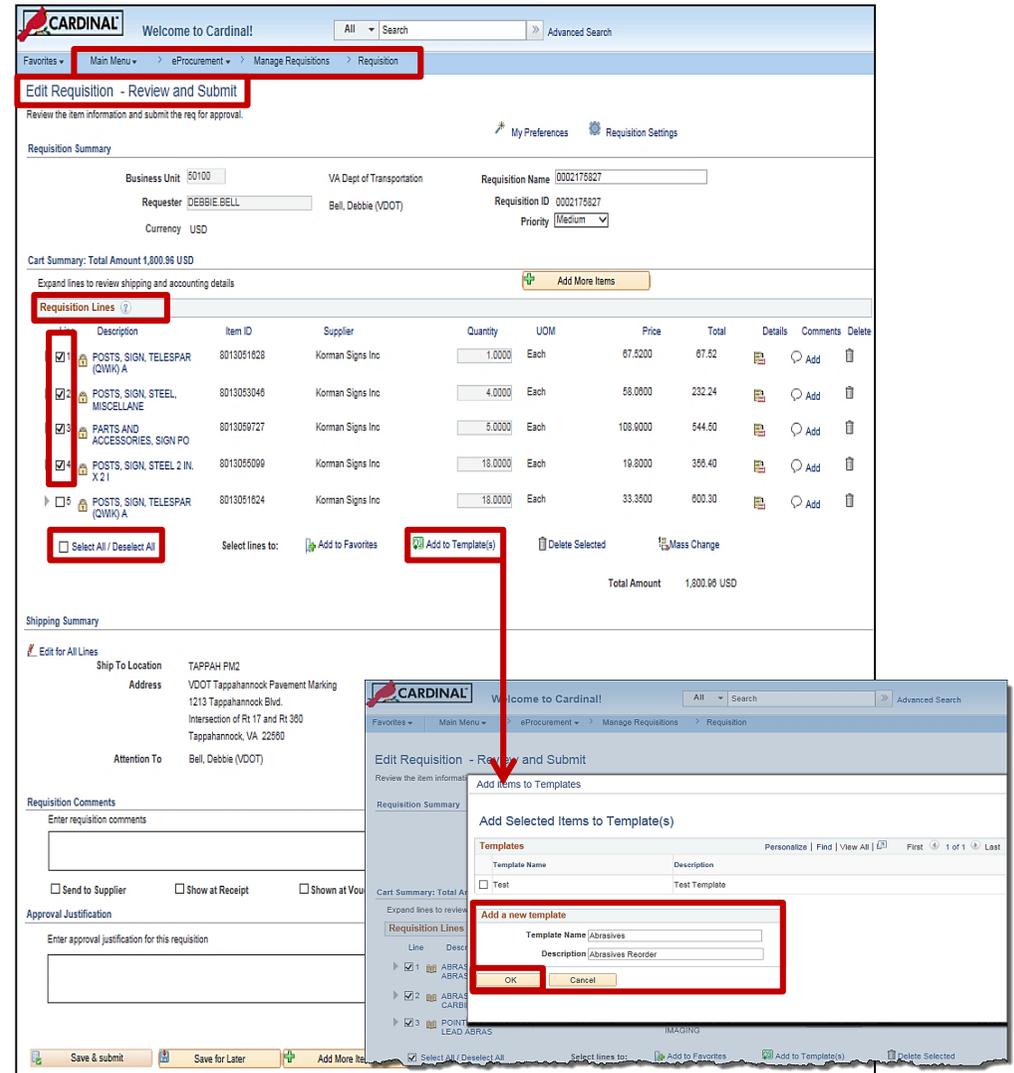
To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total		
▶ 0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD	[Select Action]	Go
▶ 0002175951	Helen Express ePro	50100	11/17/2016	Pending	0.01 USD	[Select Action]	Go
▶ 0002175950	0002175950	50100	11/17/2016	Open	50.00 USD	[Select Action]	Go
▶ 0002175949	0002175949	50100	10/21/2016	Open	148.75 USD	Approvals Cancel Copy Edit View Print [Select Action]	Go
▶ 0002175948	0002175948	50100	10/21/2016	Open	1.00 USD	[Select Action]	Go
▶ 0002175827	0002175827	50100	10/08/2016	Approved	1,800.98 USD	[Select Action]	Go
▶ 01PR02018	01PR02018	50100	10/06/2016	Open	938.30 USD	[Select Action]	Go
▶ 0002175947	0002175947	50100	10/06/2016	Open	938.30 USD	[Select Action]	Go
▶ 0002175817	FOB PLANT MIX - W-L NORTON	50100	10/05/2016	Pending	670,399.00 USD	[Select Action]	Go
▶ 0002175946	Smoke Test	50100	10/03/2016	Open	0.01 USD	[Select Action]	Go
▶ 0002175945	12x7x72 Box Culvert	50100	08/08/2016	Pending	98,000.00 USD	[Select Action]	Go

Create a Personal Template (continued)

The template may contain one or more lines. To create the template, from the **Edit Requisition – Review and Submit** page, **Requisition Lines** section:

- Click the checkbox next to the line(s) you want included on the template. Place a checkmark in the **Select All/Deselect All** checkbox to select/deselect all the lines.
- Click on the **Add to Template(s)** button. A pop-up window displays.
- Enter a name and description for the template. Click the **OK** button to save the new template.
- The **Check Out – Review and Submit** page is displayed. The page can be used to process a new requisition



The screenshot displays the 'Edit Requisition - Review and Submit' page in the Cardinal eProcurement system. The page shows a requisition summary for Business Unit 00100, VA Dept of Transportation, with a Requisition Name of 0002176827 and a Requester of DEBBIE BELL. The 'Requisition Lines' section contains a table with the following data:

Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
POSTS, SIGN, TELES PAR (QWIK) A	8013051828	Korman Signs Inc	1.0000	Each	67.5200	67.52		Add	
POSTS, SIGN, STEEL, MISCELLANE	8013053046	Korman Signs Inc	4.0000	Each	58.0600	232.24		Add	
PARTS AND ACCESSORIES, SIGN PO	8013050727	Korman Signs Inc	5.0000	Each	108.0000	540.00		Add	
POSTS, SIGN, STEEL 2 IN. X 2 I	8013055090	Korman Signs Inc	18.0000	Each	19.8000	356.40		Add	
POSTS, SIGN, TELES PAR (QWIK) A	8013051824	Korman Signs Inc	18.0000	Each	33.3500	600.30		Add	

The 'Add to Template(s)' button is highlighted, and a pop-up window titled 'Add Selected Items to Template(s)' is shown. The pop-up window contains the following fields:

- Template Name: Abrasives
- Description: Abrasives Reorder

The 'OK' button is highlighted, indicating the user is ready to save the new template.



Use a Personal Template

The template is now saved. When creating a new requisition, select this template from the eProcurement **Create Requisitions** page. Click on the named template's hyperlink under the **Templates** section.

The screenshot shows the 'Create Requisition' page in an eProcurement system. The breadcrumb navigation at the top is 'Main Menu > eProcurement > Requisition', which is highlighted with a red box. Below the breadcrumb, the page title 'Create Requisition' is also highlighted with a red box. The user is identified as 'ARDMAN, HELEN'. The page features a search bar and a 'Request Options' dropdown. The main content area is divided into several sections: 'Catalog', 'Forms', 'ePro Services', 'Express Item Entry', 'Favorites', and 'Recently Ordered'. The 'Templates' section is highlighted with a red box, and a red arrow points to the 'Test Template' link under the 'Templates' section.

Navigation: Favorites ▾ Main Menu ▾ > eProcurement ▾ > Requisition

Create Requisition ?

Welcome ARDMAN, HELEN

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**
Browse Catalogs
Purchasing Items
- Forms**
Create and Submit Forms
Business Cards
- ePro Services**
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials
- Express Item Entry**
Create an Express Requisition
- Special Requests**
Create a non-catalog request
- Templates**
Browse Company and Personal Templates
Abrasive Reorder
Test Template
- Favorites**
Browse Favorite Items and Services
NUTS, JAM, STEEL 1-1/4 IN. S...
ABRASIVES, PLASTONE ABRASIVE...
ABRASIVES, SILICON CARBIDE (...
POINTERS AND PARTS, LEAD ABR...
- Recently Ordered**
View recently ordered items and services



Use a Personal Template (continued)

All personal templates display.

- To view the items in the template, click on the **Expand** triangle icon.
- For each template to be added to the requisition, enter the quantity in the box to the right of the template name.
- Click on the **Add** button to add all the items in the template to the requisition. The words **Added to cart** will appear to the right of the **Add** button.
- Click on the **Checkout** button to continue processing the requisition as described on the previous pages.

Manage Personal Templates: This hyperlink will initiate a pop-up window where template details can be viewed and modified.

Create Requisition ?

Welcome ARDMAN, HELEN

Home My Preferences Requisition Settings 3 Lines Checkout

Request Options Search Templates Search Advanced Search

Templates ? Quantity

▼ Abrasives Reorder 1.0000 Add Added to cart

Personal Template Items Find First 1-3 of 3

ABRASIVES, PLASTONE ABRASIVES, PLASTONE

Price Breaks

Item ID	0051404000	Supplier Name	E & M Auto Paint and Supply Corp
Price	0.0100 USD	Supplier ID	0000034153
UOM	Each	Manufacturer	
Quantity	500.0000		

ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE

Item ID	0051410000	Supplier Name	E & M Auto Paint and Supply Corp
Price	0.0100 USD	Supplier ID	0000034153
UOM	Each	Manufacturer	
Quantity	2000.0000		

POINTERS AND PARTS, LEAD ABRASIVE REFILL CUPS, SUITABLE FOR SHARPENING GRAPHITE AND P

Item ID	3052860018	Supplier Name	MBC PRECISION IMAGING
Price	0.0100 USD	Supplier ID	0000052871
UOM	Each	Manufacturer	
Quantity	300.0000		

Test Template Add

Manage Personal Templates



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.



Which feature allows you to add to requisition items that are not tied to a catalog?

- eProcurement
- Special Requests
- ePro Services
- Express Entry

The Catalog search allows you to further narrow your search results using the left hand navigation.

- True
- False

Which method would be best to use when you buy the same group of items frequently?

- Recently Ordered
- Templates
- Express Item Entry



Lesson 3: Summary

3

Creating an eProcurement Requisition

In this lesson, you learned:

- Create an eProcurement requisition
- Create and use eProcurement personal templates



Lesson 4: Introduction

4

Maintaining a Requisition

This lesson covers the following topics:

- Maintaining a Requisition in the Purchasing Module
- Maintaining a Requisition in the eProcurement Module



Maintaining a Requisition Overview

The Requisitions can be maintained in either the Purchasing or eProcurement module, regardless of which module was used to create the requisition. The ability to access, update, review, check the status of, or view documents associated to a requisition is available in both modules.

The options available in the Purchasing and eProcurement modules when maintaining a requisition are generally the same. However, they use different menus and views, and are presented differently on the screen.

A requisition can be edited or cancelled as long as it has not already been sourced to a purchase order or a sourcing event.

It is possible to make changes even if the requisition has been approved. However, increasing the price or quantity may trigger the requisition approval workflow.



Maintaining a Requisition: Purchasing Module

Purchasing Module

A requisition can be viewed from two pages within the Purchasing module -

- **Maintain Requisitions** page
- **Requisitions** page (view only)

Maintain Requisitions Page

Access, edit, cancel, or change a requisition from this page.

Navigate using the following path:

Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Use the **Find an Existing Value** tab search for the requisition to be maintained. Click on the desired requisition hyperlink.

Some of the viewable features include the **Document Status** and **View Approvals**.

Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value
Add a New Value

▼ Search Criteria

Business Unit = x 🔍

Requisition ID begins with

Requisition Name begins with

Requisition Status =

Origin begins with 🔍

Requester begins with 🔍

Requester Name begins with 🔍

Hold From Further Processing

Case Sensitive

Limit the number of results to (up to 300):

Search Results

300 of 15535 results are displayed.

[View All](#)

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name
50100	2075865	075865	Denied	ONL	SHARON.MORALES	Morales, Sharon W. (VDOT)
50100	2069457	RFR - S&I Removal Commuter Lot	Open	ONL	HEIDI.KOVACS	Kovacs, Heidi M. (VDOT)
50100	01PR0201B	01PR0201B	Open	ONL	A.HILL	Hill, A Scott (VDOT)
50100	002075373	002075373	Open	ONL	LINDA.BOWERY	Bowery, Linda (VDOT)



Maintaining a Requisition: Purchasing Module (continued)

Some of the viewable features include the **Document Status** and **View Approvals**. Click on the hyperlinks to view more details.

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Pending ✖

Requisition ID 0002175955

Requisition Name 0002175955 Hold From Further Processing

Header ?

*Requester GEORGE.MASON MASON,GEORGE
*Requisition Date 01/15/2017 Requirer Info
Origin ONL Online Input
*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities **Document Status**

Amount Summary ?

Total Amount 15.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requirer Items

Select Lines To Display ?

Search for Lines
Line To Retrieve

Line ? Personalize | Find | View All | First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051417548	CLOTHS, ABRASIVE,	1.0000	EA	0051417	15.00000	15.00	Pending

View Approvals *Go to ...More...

Save Return to Search Notify Refresh Add Update/Display



Maintaining a Requisition: Purchasing Module (continued)

A requisition that does not need modifications could be viewed using the **Review Requisition Information** page (a view only). Navigate to this page using the following path:

Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions

On the **Requisition Inquiry** page, enter the search criteria and click **OK**.

Requisition Inquiry
Business Unit
Requisition ID
Requisition Name
Req Status
Requester
Requester Name
Requisition Date
Supplier SetID [Supplier Lookup](#)
Supplier ID [Supplier Details](#)
Item SetID
Item Description
Department
254 characters remaining
To Req
Origin
To
Supplier Name
Item ID
 Direct Ship



Maintaining a Requisition: Purchasing Module (continued)

Requisitions Page continued

The **Details** tab displays the **Requisition ID**, **Requisition Name**, **Requisition Status**, **Requester**, **Req Date**, and **Total Amt**.

Click on the **Requisition** hyperlink to view **Requisition Details** for the requisition. Click **Return** to go back to the **Requisitions** page.

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
50100	0002175955	0002175955	Pending Approval	MASON,GEORGE	01/15/2017	15.00 USD

Business Unit	50100	Req ID	0002175955
Requester	MASON,GEORGE		
Requisition Date	01/15/2017	Merchandise Amount	15.00 USD
Req Status	Pending		

Line	Status	Item ID	Description	Supplier ID	Supplier	Req Qty	UOM	Merchandise Amt	Amount Only
1	Pending	0051417548	CLOTHS, ABRASIVE, EMERY, 9 IN	0000034153	E & M Auto Paint and Supply Corp	1.0000	Each	15.00 USD	<input checked="" type="checkbox"/>

[Return](#)



Maintaining a Requisition: Purchasing Module (continued)

From the **Requisitions** page, click the **Status** tab to display the current or completed path of the requisition being viewed. This tab contains hyperlinks to associated POs, Receipts, and Vouchers, as well as icon hyperlinks to the **Document Status**, **Approval Status**, and **Comments**.

In this example, clicking on the hyperlink for **On PO** will direct the user to the **Requisition to Purchase Order List** which will have additional hyperlinks to the POs. Clicking on the hyperlink for **Received** will direct the user to the **Requisition Receipts List** which will have additional hyperlinks to the receipts.

In the example below, the requisition went to PO and has been received, but not yet vouchered.

Cardinal
All Search >> Advanced Search Last Search Results

Favorites Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions

Requisitions

Req Inquiry Personalize | Find | View All | First 1 of 1 Last

Details Status

Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card
50100	0002175955	0002175955					<input checked="" type="checkbox"/>			

Search

Notify



Maintaining a Requisition: eProcurement Module

A requisition can also be managed using the eProcurement module from the **Manage Requisitions** page. Cancel, copy, edit, pre-check, or view a printable version of the requisition from this page.

Navigate to the **Manage Requisitions** page using the following path:

Main Menu > eProcurement > Manage Requisitions

Search for the requisition to be maintained.

To view more details about a requisition click on the **Expand** triangle icon to the left of the **Req Id**.

To cancel, copy, edit, or view a requisition, select an action from the **Select Action** drop-down list and click **Go**.

The screenshot shows the 'Manage Requisitions' page. At the top, the breadcrumb path is 'Main Menu > eProcurement > Manage Requisitions'. Below this is a search section with fields for Business Unit (50100), Requisition ID, Date From (08/01/2016), Requester, Requisition Name, Request State (All but Complete), Date To (08/15/2016), Entered By, and PO ID. A 'Search' button is highlighted. Below the search section is a table of requisitions. The third row is selected, showing details for Requisition ID 0002175940, Requisition Name 0002175940, BU 50100, Date 08/08/2016, Request State Pending, and Total 4,202.24 USD. Below the table is a 'Request Lifespan' section with a 'Line Information' table. The first line in the table is highlighted, showing Line 1, Description COLD MIX, ASPHALT, Status Pending Approval, Price 5.36000, Quantity 784.0000, UOM BG, and Supplier Seaboard Asphalt Products Co. A 'Select Action' dropdown menu is highlighted for the selected requisition, and a 'Go' button is visible next to it.

Click on image to enlarge



Maintaining a Requisition: eProcurement Module (continued)

Expanding a line displays a pictorial representation of the requisition's lifespan and status. Each active (blue) icon is a hyperlink to the document associated to the requisition (purchase order, receipt, etc.). Click on an active icon, to view the details. Click on the **Requisition** icon. The **Requisition Details** page is displayed.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 50100 Requisition Name:

Requisition ID: Request State: All but Complete

Date From: 11/01/2016 Date To: 12/30/2016

Requester: PPS1_HELEN.ARD... Entered By: PO ID:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total		
▶ 0002175953	0002175953	50100	12/29/2016	Open	28.00 USD	[Select Action] Go	
▼ 0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD	[Select Action] Go	
Requester: ARDMAN, HELEN Entered By: ARDMAN, HELEN Priority: Medium							
Request Lifespan:							
Line Information							
Line	Description	Status	Price	Quantity	UOM	Supplier	
1	ABRASIVES, PLASTONE ABRASIVE...	Pending Approval	0.01000	500.0000	EA	E & M Auto Paint and Supply Corp	✗
2	ABRASIVES, SILICON CARBIDE (...)	Pending Approval	0.01000	2,000.0000	EA	E & M Auto Paint and Supply Corp	✗
3	POINTERS AND PARTS, LEAD ABR...	Pending Approval	0.01000	300.0000	EA	MBC PRECISION IMAGING	✗
▶ 0002175951	Helen Express ePro	50100	11/17/2016	Pending	0.01 USD	[Select Action]	Go
▶ 0002175950	0002175950	50100	11/17/2016	Open	50.00 USD	[Select Action]	Go



Maintaining a Requisition: eProcurement Module (continued)

On the **Requisition Details** page, if comments were added to the requisition they will be displayed in the **Requisition Summary** section.

In the **Requisition Lines** section, click on the **Expand** triangle icon next to a line to view the shipping details for the line. Expand the **Accounting Lines** to view the accounting distribution details if desired.

If associated to a contract, there will be a **Contract Information** hyperlink. Click on it to drill down to the contract details.

Navigate to edit the requisition by clicking on the **Edit Requisition** button at the bottom of the page.

The requisition will open in the module it was created in i.e., eProcurement or Purchasing.

Use the **Return to Manage Requisitions** hyperlink to navigate back the **Manage Requisitions** page.

Requisition Details

Requisition Summary

Business Unit 60100 Requisition Name 0002175952
Date 12/29/2016 Requisition ID 0002175952
Request State Pending Total Amount 28.00 USD
Requested For PPS1_HELEN.ARDMAN

Expand lines to review shipping and accounting details

Requisition Lines

Line	Item Description	Source	Status	Amount Only	Quantity	Price	Status	Total
1	ABRASIVES, PLASTONE ABRASIVE...	Not Source		No	500.0000	Each	0.01000 USD Pending	5.00

Shipping Line 1 Ship To CNTRL OFF3
VDOT Central Office
1221 E. Broad St.
Richmond, VA 23219

Quantity 500.0000
Price 0.01000 Price Adjustment

Attention To ARDMAN, HELEN
Due Date

Accounting Lines

Distribute By Qty Liquidate By Amt

Accounting Lines Personalize | [?] | [?] First 1 of 1 Last

Dist #	Status	Location	Req Qty	Merchandise Amt	Percent	GL Unit	Entry Event	Account	Fund	Program	Department
1	Open	CNTRL OFF3	500.0000	5.00	100.0000	50100		5012550	04100	666001	10003

Edit Requisition

Return to Manage Requisitions



Maintaining a Requisition: eProcurement Module (continued)

If active, i.e., blue, click on the **Approvals** icon from the lifespan on the **Manage Requisitions** page to view the status of the approvals for the selected requisition.

The screenshot shows the 'Manage Requisitions' interface. A red box highlights the 'Approvals' icon in the request lifespan. Another red box highlights the 'Approval Status' panel, which displays details for requisition 0002175952, including the requester (ARDMAN, HELEN), status (Pending), and total amount (28.00 USD). A third red box highlights the 'Req for Supervisor Action' section, showing a pending approval from MCCRACKEN, STACY. A fourth red box highlights the 'Req for Procurement Mgr Action' section, showing a 'Not Routed' status with 'Multiple Approvers' and 'Approval Assignment to Buyer'.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 50100 Requisition Name: Request State: All but Complete
Requisition ID: Date From: 11/01/2016 Date To: 12/30/2016
Requester: PPS1_HELEN.ARDAN Entered By: PO ID: [blank]

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total
0002175953	0002175953	50100	12/29/2016	Open	28.00 USD
0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD
0002175951	Helen Express ePro	50100	11/17/2016	Pending	0.01 USD
0002175950	0002175950	50100	11/17/2016	Open	50.00 USD

Requester: ARDMAN, HELEN Entered By: ARDMAN, HELEN Priority: Medium

Request Lifespan: Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice

Line Information

Line	Description	Status	Price	Quantity	UOM	Supplier
1	ABRASIVES, PLASTONE ABRASIVE...	Pending Approval	0.01000 USD	500.0000 EA	E & M Auto Paint s	
2	ABRASIVES, SILICON CARBIDE (...)	Pending Approval	0.01000 USD	2,000.0000 EA	E & M Auto Paint s	
3	POINTERS AND PARTS, LEAD ABR...	Pending Approval	0.01000 USD	300.0000 EA	MBC PRECISION	

Approval Status

Business Unit: 50100
Requisition ID: 0002175952
Requisition Name: 0002175952
Requester: ARDMAN, HELEN
Entered on: 12/29/2016
Status: Pending
Priority: Medium
Total Amount: 28.00 USD
Requester's Justification: No justification entered by requester.

Line Information

Review/Edit Approvers

Req for Supervisor Action

Requisition 0002175952: Pending

Req - Requester's Supervisor

Pending

MCCRACKEN, STACY
Requester's Supervisor

Req for Procurement Mgr Action

Requisition 0002175952: Awaiting Further Approvals

Req - Procurement Manager

Not Routed

Multiple Approvers
Approval Assignment to Buyer

Return to Manage Requisitions

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report



Lesson 4: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.



Requisitions can be maintained in either the eProcurement module or the Purchasing module, regardless of which module was used to create the requisition.

- True
- False

You cannot cancel a requisition after the requisition has been approved.

- True
- False



Lesson 4: Summary

4

Maintaining a Requisition

In this lesson, you learned:

- Maintain a requisition using the Purchasing module
- Maintain a requisition using the eProcurement module



Course Summary

PR342

Processing Requisitions

In this course, you learned:

- Describe requisition concepts, processes, integration, and interfaces.
- Create and submit a requisition in the Purchasing and the eProcurement modules.
- Maintain a requisition in the Purchasing and the eProcurement modules.



Course Evaluation

Congratulations! You successfully completed the **501 PR342: Processing Requisitions** course.

Click [here](#) to access the evaluation survey for this course.

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the **[X]** button in the upper right corner.





Appendix

- Key Terms
- Allowed Extensions on Attachments in Cardinal
- Screenshots
- Flowchart Key



Key Terms

Accounting Distribution: ChartField string that defines how a transaction is charged (i.e., which fund, program department, account, etc.).

Buyer: A Buyer is an Individual authorized to create a purchase order.

eProcurement module: The eProcurement module provides a web-based solution, similar to a shopping cart experience, for the activities associated with requesting goods and services.

Favorite Item: Favorites are items frequently ordered that a user can maintain in a single location. Cardinal automatically builds this list showing the last date the item was requested and the number of times the item has been requested. You can manually add to this list of frequently ordered (favorite) items and use the list to add items to a requisition without searching the item catalog.

General Ledger: The module that contains all the accounts (e.g., Budget, Actuals, Modified Accrual, Full Accrual, and Cash) used to track accounting transactions. The General Ledger serves as the basis for the preparation of financial statements.

Item: An item represents the goods or services provided by supplier. There is a unique identifier for each item. Items are important for analyzing the total purchase and facilitate the negotiation of a contract with a supplier and Strategic Sourcing activities.



Key Terms (continued)

Item Category: Groups of similar items. Cardinal allows for the definition of item categories, which can greatly reduce the repetitive tasks associated with service and material purchases.

Procurement: Procurement is the principles, standards, and guidelines related to public purchasing.

Project: A project is a structure used to track costs, generally over an extended period of time. It generally has a finite beginning and end. Typically it requires both fiscal year and life to date budget and actual reporting (e.g., Upgrade signal at Harry Byrd Hwy & Sterling Blvd is **0000094859**).

Purchase Order: A purchase order is a commitment from an agency to a supplier to purchase goods or services from that supplier. It lists purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, and is part of the contractual nature of the purchase order.

Purchasing Module: The Purchasing Module facilitates the buying of goods and services and the processing of requisitions. Purchasing is the actual transaction between an agency and a supplier.

Req Sourced from Contract: This step identifies whether a contract has already been established with the supplier.

Requisition: A requisition is the request for items or services. A requisition is an online form that you use to request goods or services. Requisitions can be created from the eProcurement or Purchasing module.



Key Terms (continued)

Schedule: The schedule defines when and where you want the line items delivered. Schedule is under the **Ship To/Due Date** tab in the **Line** section of the requisition. The schedule includes the **Due Date**, the **Ship Date**, and the **Ship To** location for the goods. One schedule can include many lines (individual items each with its own description and price).

Sourcing: Sourcing is the process of creating purchase orders from requisitions.

SpeedChart: A shorthand key that automatically populates some ChartFields in one or more accounting distributions.

Storekeeper: The person(s) responsible for handling orders placed via Cardinal and being filled by WebIMS. The District Storekeeper orders, receives, and issues WebIMS stock.

Strategic Sourcing: Strategic sourcing refers to the process of determining the best suppliers for needed goods and/or services, and the conditions under which you award them your business. The Strategic Sourcing module allows end users to create and/or award bids, proposals, purchase orders, and contracts in Cardinal.

Submit Requisition for Approval: When the requisition has all the required item lines and additional data entered, the Requisitioner submits the requisition for approval.



Key Terms (continued)

Supplier: Any person or other entity that provides goods and/or services, or receives refunds, including suppliers, federal, state, or local government entities, and other fiscal payees. All procurement suppliers are interfaced from eVA to Cardinal. Non-procurement suppliers (also called Fiscal Payees) will be created directly in Cardinal. Employees are not suppliers for their own agencies.

Template: A template provides a quick way to create a requisition using previous requisition information.

WebIMS: WebIMS is a custom order fulfillment solution used specifically to order goods such as safety gear, salt or sand for snow treatment, etc. When this type of good is ordered, Cardinal interfaces with WebIMS to fulfill that order.



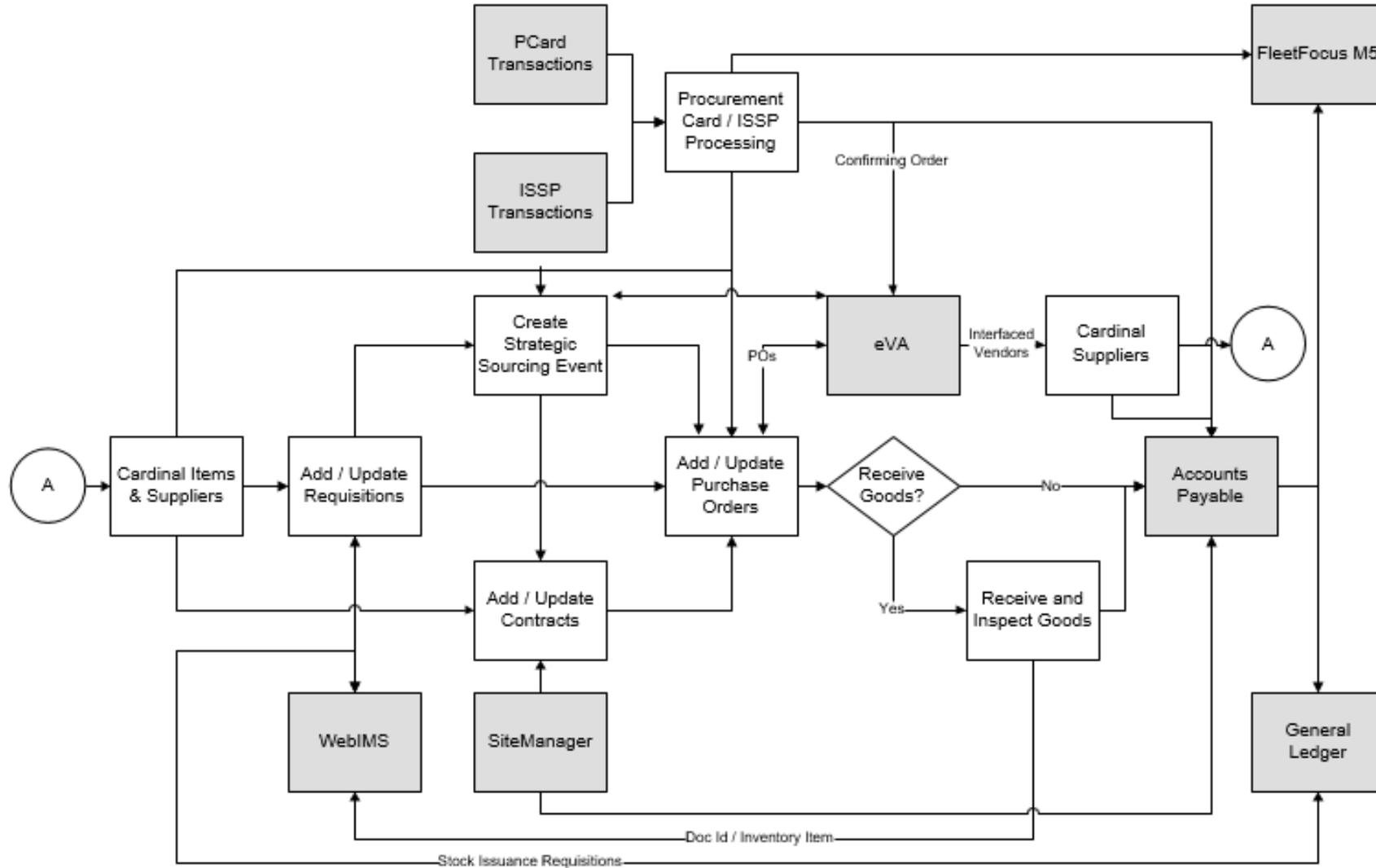
Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. You should only attach key supporting documents that either enhance the electronic Cardinal transaction approval process or are instrumental as part of the transaction history. The Cardinal system should not be relied upon to maintain agency documentation and should not be considered the official retention source of the agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the agency apart from the Cardinal attachment functionality.

Allowed Extensions on Attachments in Cardinal		
.BMP	.CSV	.DOC
.DOCX	.JPE	.JPEG
.JPG	.MSG	.PDF
.PNG	.PST	.RTF
.TIF	.TIFF	.TXT
.XLS	.XLSX	.XML



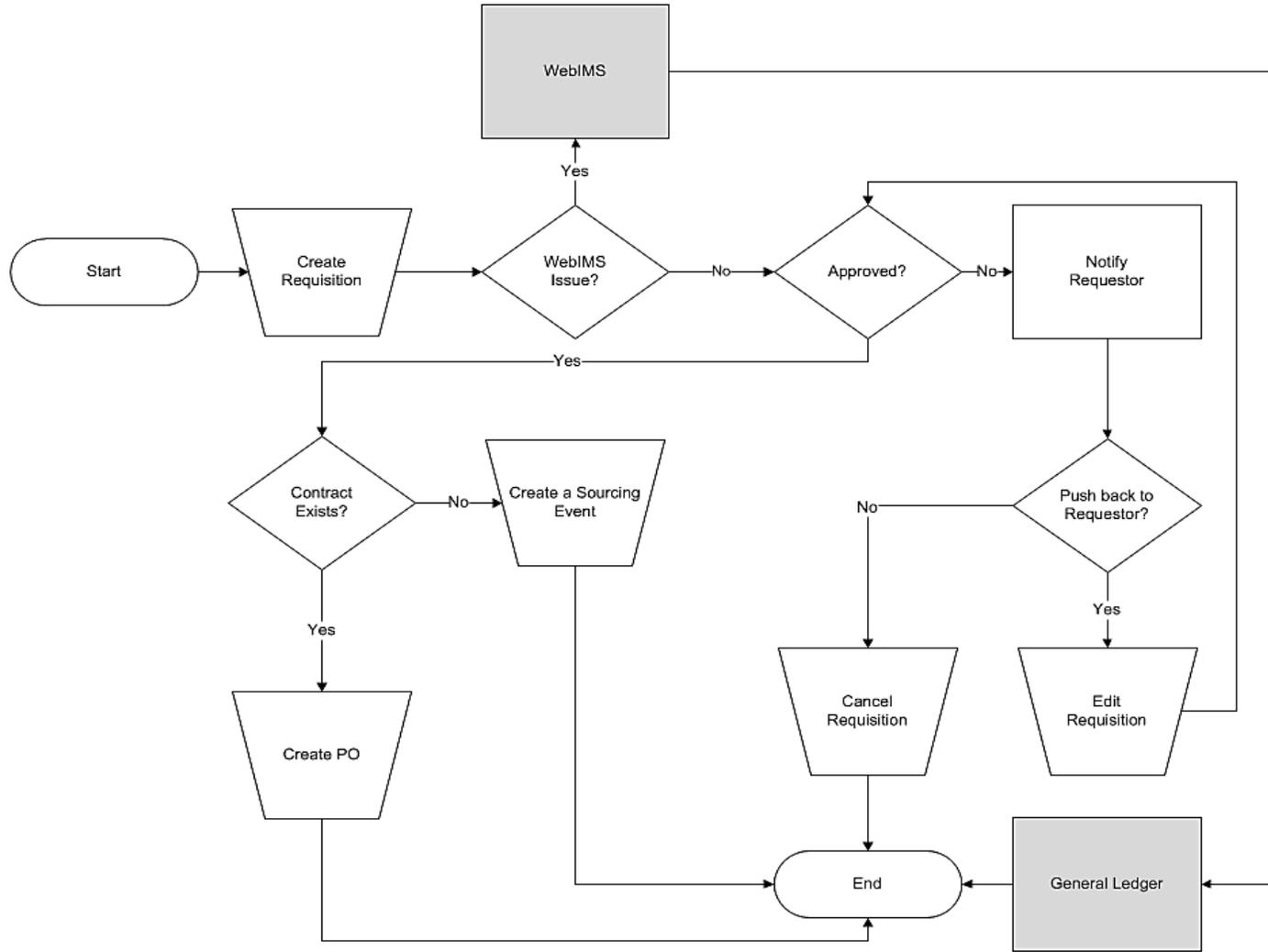
Procurement Overview (continued)



Click on image to return



Requisition Process (continued)



Click on image to return



Create an eProcurement Requisition: Defaults (continued)

Create Requisition ?

Welcome AR

Requisition Settings

Business Unit: 50100 VA Dept of Transportation Requisition Name: []

Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN Priority: Medium

*Currency: USD

Default Options ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier: [] Category: []

Supplier Location: [] Unit of Measure: []

Buyer: []

Shipping Defaults

Ship To: CNTRL OFF3 Add One Time Address

Due Date: [] Attention: []

Distribution Defaults

SpeedChart: []

Accounting Defaults Personalize | Find | [] [] First 1 of 1 Last

Chartfields1 Details Asset Information []

Dist	Percent	Location	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	100.0000	CNTRL OFF3	50100	[]	5012550	04100	899001	10003	11120010

OK Cancel

Click on image to return



Checkout - Review and Submit: Requisition Lines

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete		
<input checked="" type="checkbox"/>	1		ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00		Add	
Shipping Line 1		*Ship To: CNTRL OFF3		Quantity: 500.0000				Price: 0.0100	Price Adjustment Pegging Inquiry Pegging Workbench			
		Address: VDOT Central Office 1221 E. Broad St. Richmond, VA 23219		Add One Time Address								
		Attention To: ARDMAN, HELEN										
		Due Date: <input type="text"/>										

Accounting Lines

*Distribute By: Qty SpeedChart

Accounting Lines Personalize | Find | View All | First 1 of 1 Last

Line	Status	Unit Type	Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		CNTRL OFF3	500.0000	100.0000	5.00	50100	

<input checked="" type="checkbox"/>	2		ABRASIVES, SILICON CARBIDE (CA)	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00		Add	
<input checked="" type="checkbox"/>	3		POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 28.00 USD

Click on image to return



Maintaining a Requisition: eProcurement Module

Favorites ▾ Main Menu ▾ > eProcurement ▾ > Manage Requisitions

New Window | Help | Personalize Page |

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit Requisition Name

Requisition ID Request State

Date From Date To

Requester Entered By PO ID

[Show Advanced Search](#)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total		
▶ 0002175945	12x7x72 Box Culvert	50100	08/08/2016	Pending	96,000.00 USD	[Select Action]	Go
▶ 0002175944	12x8x42 Box Culvert	50100	08/08/2016	Canceled	0.00 USD	[Select Action]	Go
▼ 0002175940	0002175940	50100	08/08/2016	Pending	4,202.24 USD	[Select Action]	Go

Requester Grindstaff, Bonnie (VDOT) Entered By Grindstaff, Bonnie (VDOT) Priority Medium

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

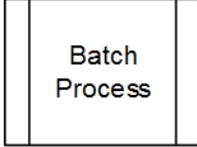
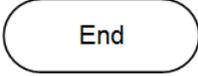
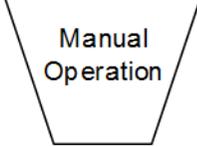
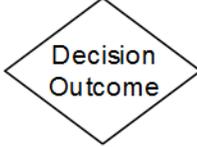
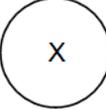
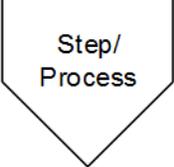
Line Information Personalize | Find | First 1 of 1 Last

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	COLD MIX, ASPHALT	Pending Approval	5.36000 USD	784.0000 BG		Seaboard Asphalt Products Co	✘
▶ 0002175937	RESTOCK 21A FOR ARLINGTON	50100	08/08/2016	PO(s) Dispatched	1,826.48 USD	[Select Action]	Go
▶ 0002175934	0002175934	50100	08/08/2016	Pending	1,800.00 USD	[Select Action]	Go
▶ 0002175913	0002175913	50100	08/08/2016	PO(s) Dispatched	7,500.60 USD	[Select Action]	Go
▶ 0002175905	SNOW 2016	50100	08/08/2016	Pending	8.00 USD	[Select Action]	Go
▶ 0002175902	0002175902	50100	08/08/2016	Pending	14,169.90 USD	[Select Action]	Go

Click on image to return



Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.



End Of Appendix

Congratulations! You successfully completed the appendix section of **501 PR: Processing Requisitions** course.

To close the web based training course, click the '**X**' button in the upper right corner.