



Creating Regular Requisitions Overview

This Job Aid provides step-by-step instructions for creating regular Requisitions in Cardinal. A Requisition is a request for the procurement of goods and/or services. They may serve as the starting point for purchase requests, allowing VDOT to ensure that goods and services are obtained through approved processes. Requisitions may be created ad hoc, copied from existing Requisitions, or created from existing Contracts.

Each Requisition must be submitted for supervisor approval before a Purchase Order (PO) or Strategic Sourcing Event can be sourced from it.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

Revision Date	Summary of Changes
10/21/2025	Baseline.

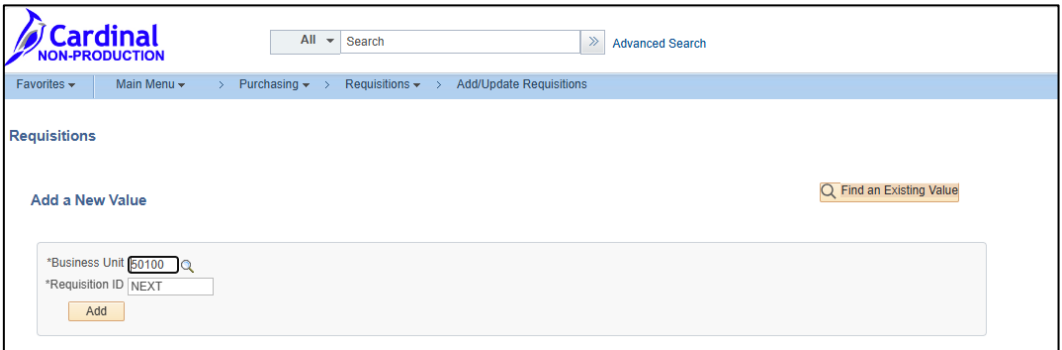
Creating a Regular Requisition

A Requisition is a request for the procurement of goods and/or services and is required for all inventory items. For specific details related to inventory Requisitions, please refer to the course titled

PR343_Inventory Issuances and Restock.

For non-inventory items and services, a Requisition is used to assign buyers and track the progress and status of a purchase request. Requisitions can be created from existing Contracts, copied from other Requisitions, or created ad hoc. All Requisitions must be approved by a supervisor before they can be executed via a Purchase Order (PO) or Contract.

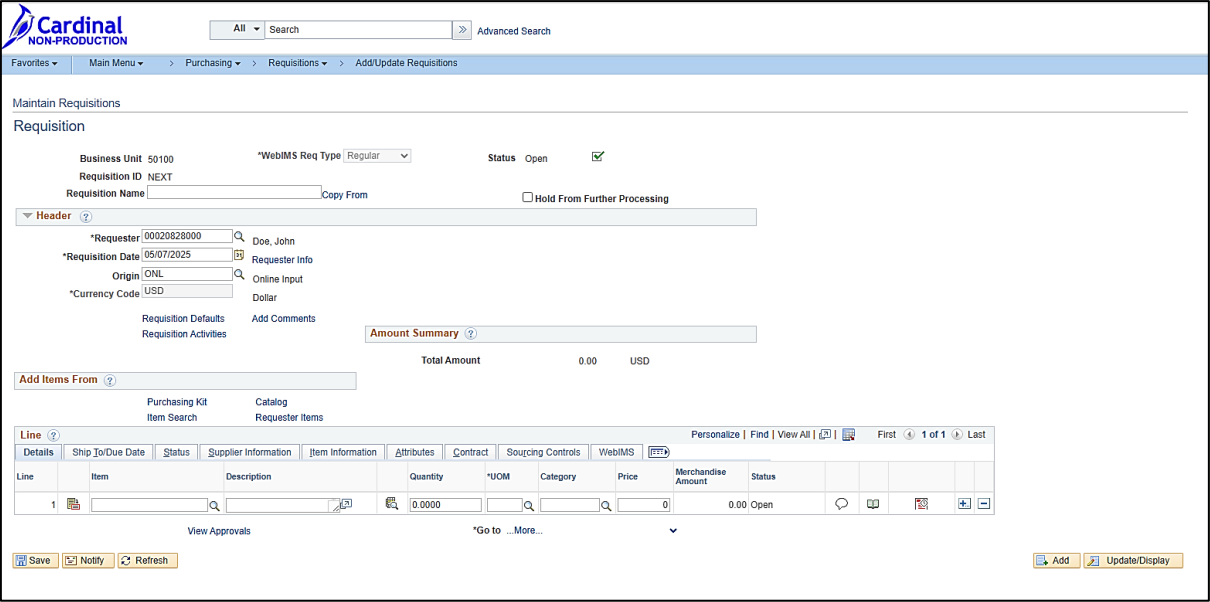
All Suppliers are shared across the Commonwealth in one centralized database maintained by the Commonwealth Vendor Group (CVG). A Supplier must be added to Cardinal before it can be used on a Purchase Order, Strategic Sourcing Event, Voucher, or Payment. However, a Supplier is not required when creating a Requisition.

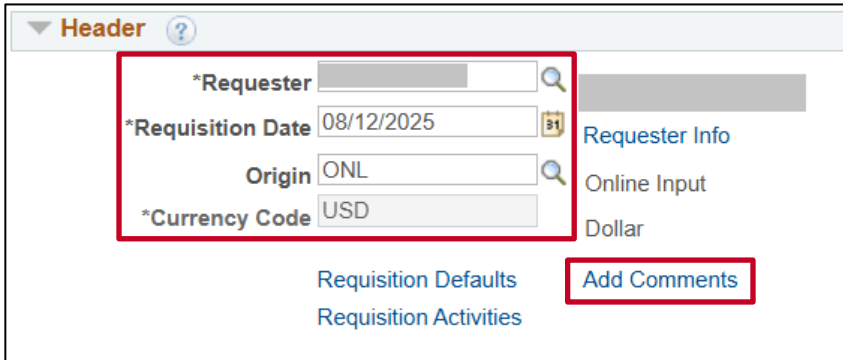
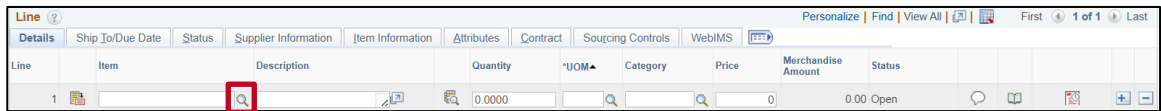
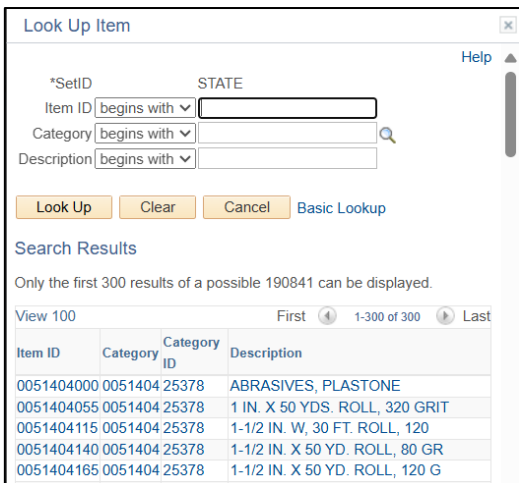
Step	Action
1.	Navigate to the Requisitions page using the following path: Main Menu > Purchasing > Requisitions > Add/Update Requisitions The Requisitions Add a New Value page displays. 
	The Business Unit field should default based on the user's Agency. The Requisition ID field is automatically set to "NEXT" and should not be changed. Cardinal assigns a Requisition ID Number when the user saves the Requisition. 



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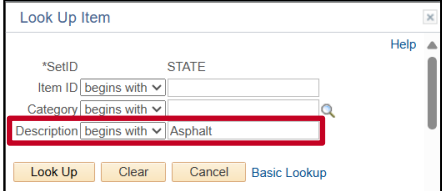
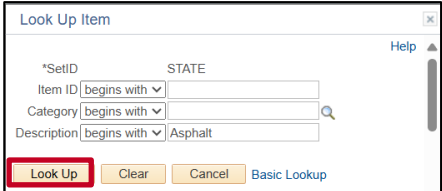
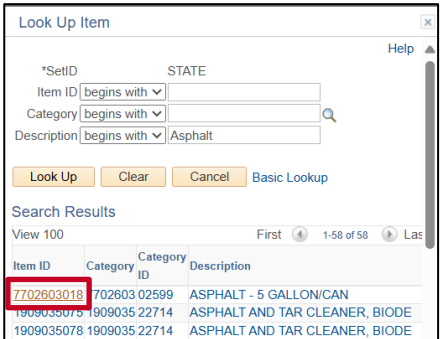
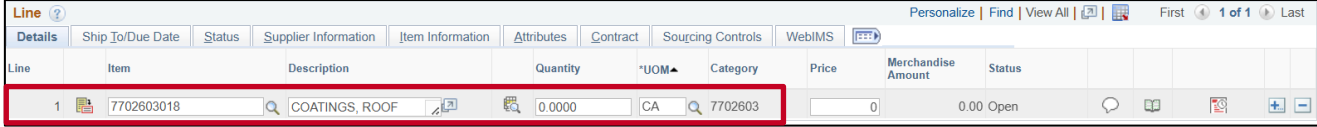
Step	Action
2.	Click the Add button. *Business Unit 50100 *Requisition ID NEXT Add
The Maintain Requisitions Requisition page displays. 	
3.	Enter a descriptive title for the Requisition in the Requisition Name field. Otherwise, the Requisition name will default to the same as the Requisition ID Number once saved. Requisition Name

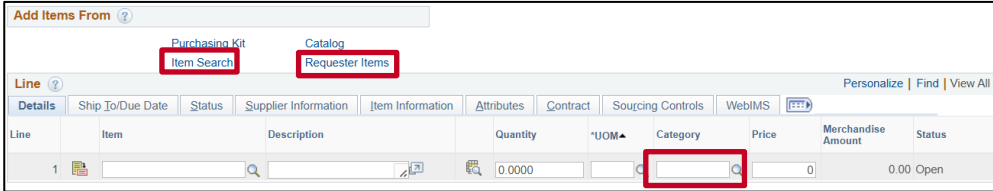
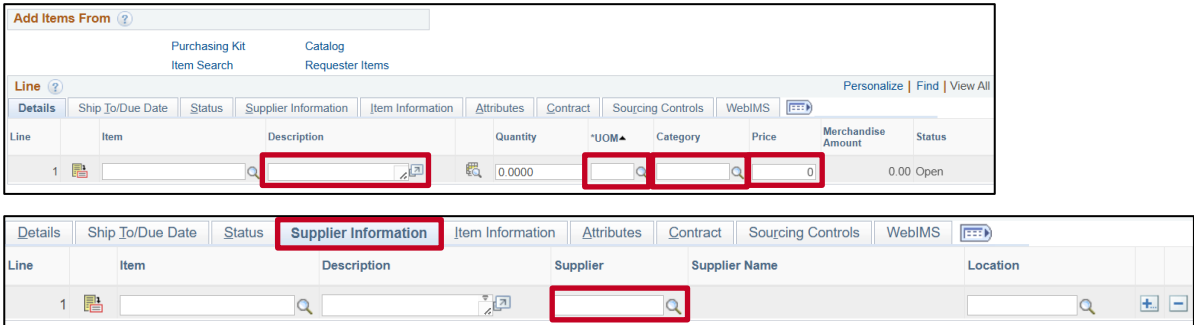
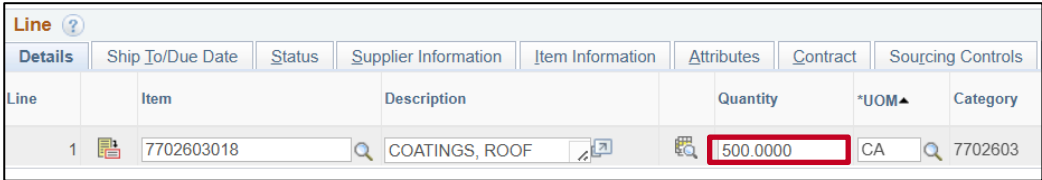
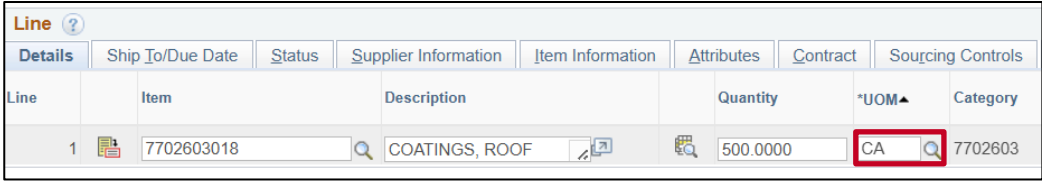
Step	Action
	The Header section contains key data such as the Requester, Requisition Date, and Origin fields. Header comments can also be added here as needed using the Add Comments link. For instructions, see the Adding Comments and Attachments to a Requisition Header section in this Job Aid. Default information, such as the Requester and Ship To fields, automatically populate based on the user setup but can be changed as needed. 
4.	Next, complete the Requisition Line(s). Click the Item Look up icon and select the applicable National Institute of Governmental Purchasing (NIGP) Item Number. 
	The Look Up Item page displays in a pop-up window. 

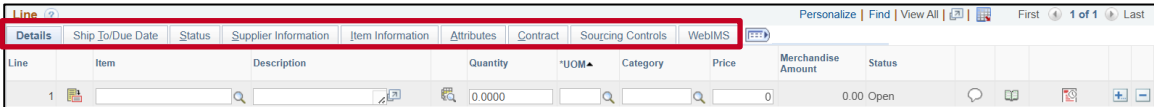
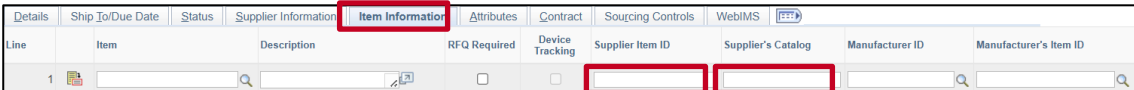
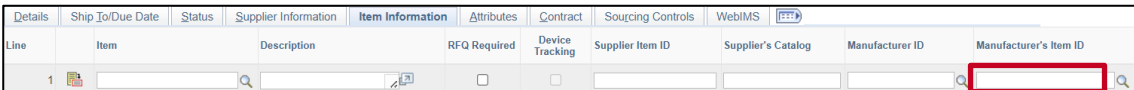
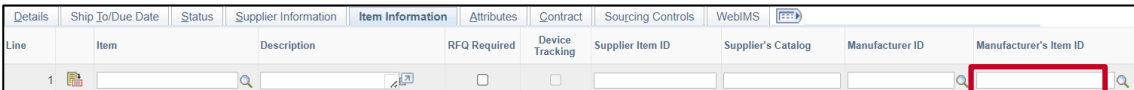
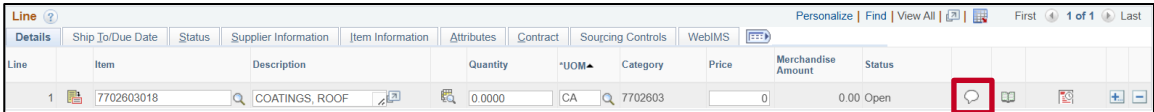


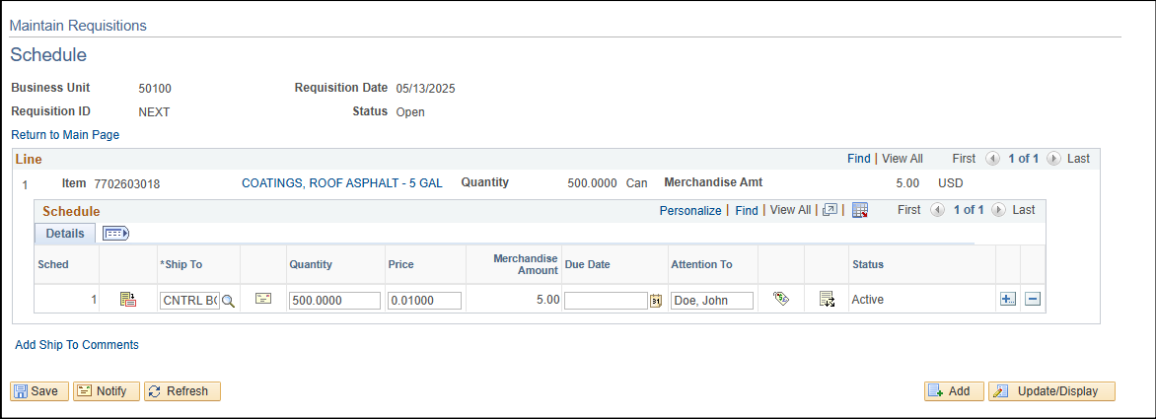
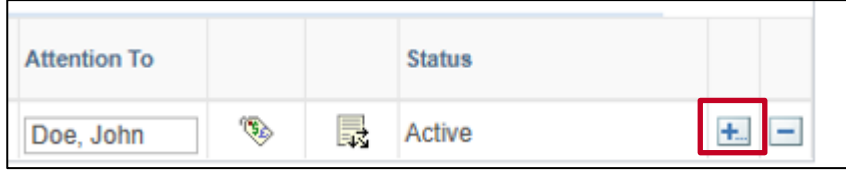
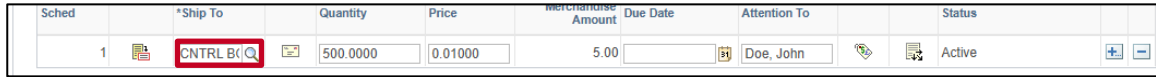
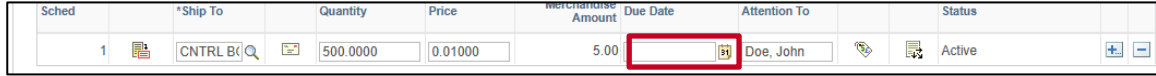
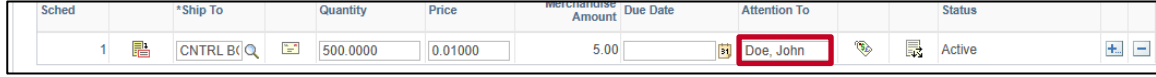
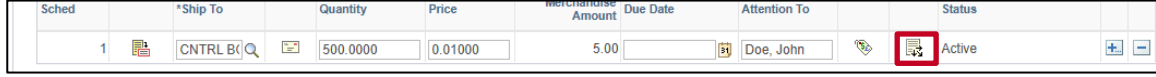
Procurement Job Aid

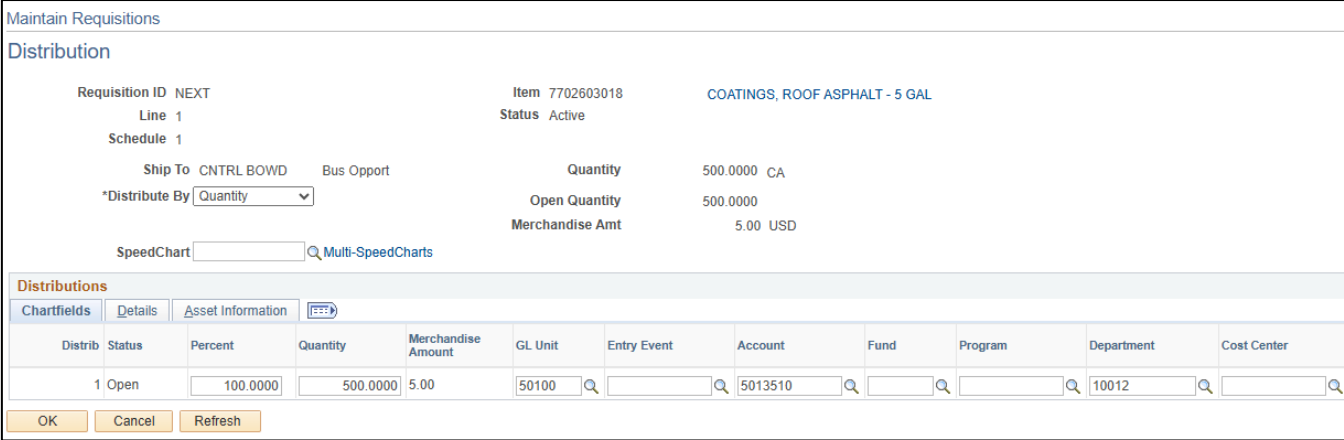
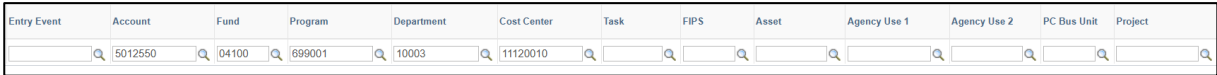
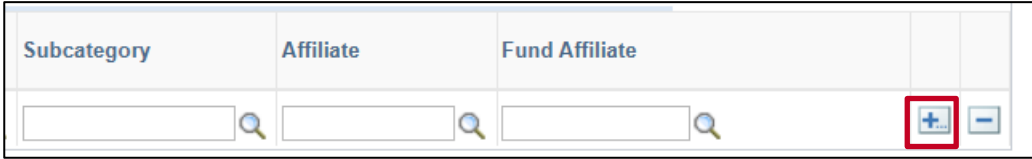
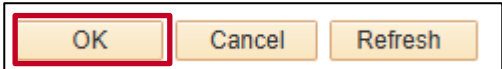
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Step	Action
5.	Enter key search information in the Description field. 
6.	Click the Look Up button. 
7.	The search results display. Click the link within the Item ID field to select the applicable Item. 
The Maintain Requisitions Requisition page redisplay with the Item populated for Line 1 in the Line section. 	

Step	Action
i	Other options for looking up Items include: - Looking up the NIGP Category in the Category field on each Line - Using the Item Search link to search by Category, Description, or Item ID - Using the Requester Items link which lists Items the Requester has previously requested  Note: The Purchasing Kit and Catalog links are not generally used.
	If an Item is not found, use the appropriate Category Code and enter the unlisted Item's Description, UOM, and estimated Price on the Details tab. Also, enter the Supplier ID in the Supplier field in the Supplier Information tab. 
8.	Enter the applicable quantity in the Quantity field. 
i	Note that the UOM (Unit of Measurement) field displays how the price per quantity is calculated (e.g., "EA" (Each), "CA" (Can), etc.). 

Step	Action
	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). 
	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) Items, enter the VDC stock Item Number in the Manufacturer's Item ID field.  To specify a District/CO and District/Division location, use the Manufacturer's Item ID field. 
	To add Line Comments or Attachments, click the Line Comments icon for the Line. For instructions, see the Adding Comments and Attachments to a Requisition Line section in this Job Aid. 
9.	Click the Schedule icon on each Line to enter the due date and verify where and to whom the Items should be delivered. 

Step	Action
	The Maintain Requisitions Schedule page displays. 
	Never click the Add a New Row icon to add a Schedule.  There should only be one Schedule per Requisition Line because the interface with eVA does not permit such an action and will cause the subsequent Purchase Order to error out. Create another Requisition Line for each separate Schedule required.
10.	Verify the defaulted delivery location in the Ship To field. Update as needed. 
11.	Click the Due Date Calendar icon and select the desired delivery date. 
12.	The Attention To field defaults to the user creating the Requisition. Update as needed. 
13.	Click the Distribution icon to enter the accounting distribution for the Line. 

Step	Action
	The Maintain Requisitions Distribution page displays with the Chartfields tab displayed by default. 
14.	Enter the applicable ChartField values in the corresponding fields. 
	A Schedule may have one or more ChartField distributions. The ChartField values identify the accounting distribution. Valid Account, Department, Cost Center, and Project values are required. A ChartField value can be manually entered, or the Multi-SpeedCharts link can be used to select a SpeedChart value to automatically populate some of the ChartField values.
15.	Scroll right and click the Add a New Row icon at the end of the accounting Distribution Line to insert additional accounting distributions as needed. 
16.	Click the OK button. 



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Step	Action
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The **Maintain Requisitions Schedule** page redisplay.

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 05/13/2025
Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Description	Quantity	Unit	Merchandise Amt	Due Date	Attention To	Status
1	7702603018	COATINGS, ROOF ASPHALT - 5 GAL	500.0000	Can	5.00 USD		Doe, John	Active

Add Ship To Comments

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

17. Click the **Return to Main Page** link.

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 05/13/2025
Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Description	Quantity
1	7702603018	COATINGS, ROOF ASPHALT - 5 GAL	

The **Maintain Requisitions Requisition** page redisplay.

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 00020828000 Doe, John
*Requisition Date 05/13/2025 Requisition Info
Origin ONL Online Input
*Currency Code USD Dollar

[Requisition Defaults](#) [Add Comments](#)

Amount Summary

Total Amount 5.00 USD

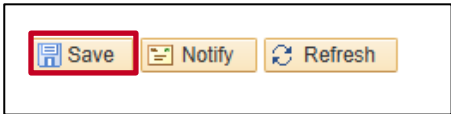
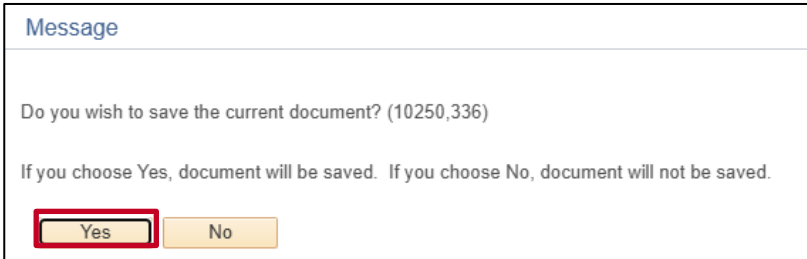
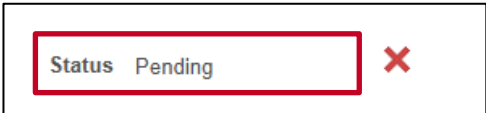
Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7702603018	COATINGS, ROOF	500.0000	CA	7702603	0.01000	5.00	Open

[View Approvals](#) [Go to ...More...](#)

[Save](#) [Notify](#) [Refresh](#)

Step	Action
	Click the Add a New Row icon to the right of an existing Line to add a new Line and then repeat Steps 4 - 17.  Requisition Lines can also be set for Amount Only. For instructions on Amount Only Lines, see the Creating an Amount Only Requisition Line section in this Job Aid.
18.	Click the Save button. 
19.	The page refreshes and the Requisition ID Number is systematically assigned. 
20.	Once all of the Lines have been entered, click the Submit for Approval icon to send the Requisition to the supervisor for approval. 
21.	A Message displays in a pop-up window. Click the Yes button to save the Requisition. 
The Maintain Requisitions Requisition page redisplay. The Status field is updated to “Pending” and the Submit for Approval icon disappears. 	



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Step	Action
22.	Click the View Approvals link. View Approvals Save Return to Search Notify Refresh
23.	A Message displays in a pop-up window. Click the Yes button to save the Requisition and view the approval monitor. Message Do you wish to save the current document? (10250,345) If you choose Yes, document will be saved and submitted for approval. The approval monitor will be displayed. If you choose No, document will not be saved. Yes No



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Step	Action
	The View Approvals page displays in a pop-up window with the default approval workflow. Review the approvals information as needed and then click the Return button. View Approvals Business Unit 50100 Requisition ID 0002410696 Requisition Name Roofing Asphalt Requested For Doe, John Status Pending Number of Lines 2 Total Amount 25,005.00 USD Req for Supervisor Action Roofing Asphalt:Pending Start New Path Req - Requester's Supervisor Pending Requester's Supervisor Req for Procurement Mgr Action Roofing Asphalt:Awaiting Further Approvals Start New Path Req - Procurement Manager Not Routed Multiple Approvers Approval Assignment to Buyer Apply Approval Changes Return



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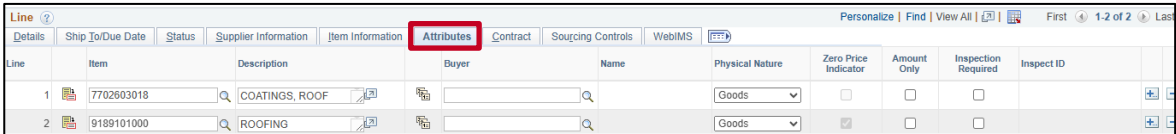
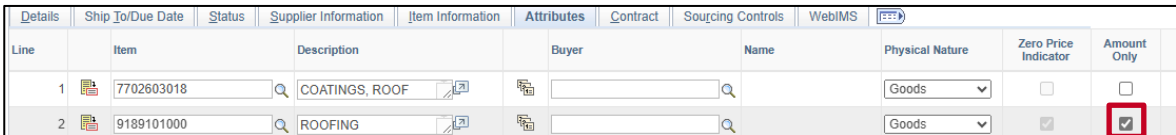
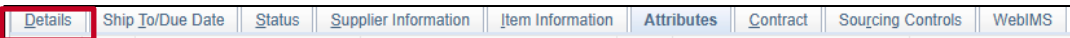
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Creating an Amount Only Requisition Line

A requested Item may need to be invoiced as a single amount of money or as different amounts of money over time. In this case, use the **Amount Only** checkbox option. Requesting and ordering with the **Amount Only** checkbox option selected allows the Line to be received only by invoiced amount (dollars) instead of by quantity.

When using the **Amount Only** checkbox option:

- 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 entered becomes the schedule price and amount
- The **Distribute By** field, located on the **Distribution** page, is set to “Amount” and cannot be modified

1.	Create a new Requisition and add an Item by following steps 1 - 7 of the Creating a Regular Requisition section in this Job Aid.
2.	Click the Attributes tab. 
3.	Click the Amount Only checkbox option. 
4.	Click the Details tab. 
A Message displays in a pop-up window explaining that the Quantity field will be set to “1” and the system will reprice. Message The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238) The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you. Yes No	



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5. Click the **Yes** button to close the **Message**.

Yes	No
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6. The **Details** tab redisplay.
- Enter the total amount in the **Price** field.

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS	
Line	Item	Description	Quantity	*UOM	Category	Price			
1	7702603018	COATINGS, ROOF	500.0000	CA	7702603	0.01000			
2	9189101000	ROOFING	1.0000	HUR	9189101	25000			

7. Click the **Schedule** icon.

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The **Maintain Requisitions Schedule** page displays.

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 05/13/2025
Requisition ID 0002410700 Status Open

Return to Main Page

Line

2 Item 9189101000 ROOFING CONSULTANT ROOFING CON Quantity 1.0000 Hour Merchandise Amt 25,000.00 USD

Schedule

Personalize Find View All First 1 of 1 Last

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	
1	CNTRL BC	1.0000	25,000.0000	25,000.00		Doe, John	Active	

Add Ship To Comments

Save Return to Search Notify Refresh

Add Update/Display

8. Complete the **Maintain Requisitions Schedule** page by following Steps 9 - 12 in the [Creating a Regular Requisition](#) section in this Job Aid.

9. Click the **Distribution** icon.

Attention To		Status
Doe, John		Active



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The **Maintain Requisitions Distribution** page displays.

Distribution Details

Maintain Requisitions

Distribution

Requisition ID: 0002410700 Item: 9189101000 ROOFING CONSULTANT ROOFING CON
Line 2 Status: Active
Schedule 1

Ship To: CNTRL BOWD Bus Opport Quantity: 1.0000 HUR
*Distribute By: Amount Open Amount: 25,000.000
Merchandise Amt: 25,000.00 USD

SpeedChart: Multi-SpeedCharts

Distributions

Chartfields Details Asset Information [PDF]

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
1	Open	100.0000	25,000.00	50100		5012090			10012								



Note that the **Distribute By** field is set to “Amount” and cannot be modified.

*Distribute By: Amount

10.

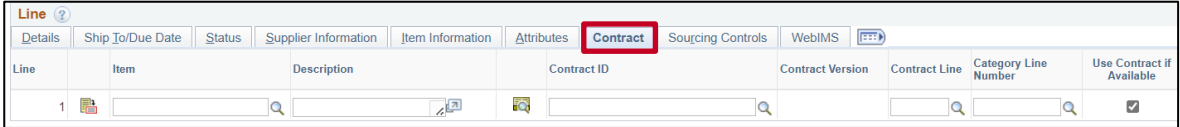
Set the **Merchandise Amount** field to the total price as needed.

Distrib	Status	Percent	Merchandise Amount
1	Open	100.0000	25,000.00



Complete the process for creating a Regular Requisition by following Steps 14 - 24 in the [Creating a Regular Requisition](#) section of this Job Aid.

Creating a Requisition from a Contract

Step	Action
1.	Create a new Requisition by following Steps 1 - 3 of the Creating a Regular Requisition section of this Job Aid.
2.	Click the Contract tab in the Line section. 
3.	Click the Contract Search icon. 

The **Contract Search** page displays.

Contract Search

Help

Search Criteria

SetID STATE

Contract ID

Contract Style

Contract Process Option

Administrator/Buyer

Description

Master Contract ID

Contract Reference Type

Corporate Contract

Requisition Date 05/19/2025

Supplier SetID STATE

Supplier ID

Item SetID STATE

Item ID

Item Description

Category

Manufacturer ID

Manufacturer's Item ID

Supplier Item ID

UPN ID

Search

Clear

Contract Details

OK

Cancel

Refresh



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Step	Action																																	
4.	Enter the applicable Item ID in the Item ID field or the desired Supplier in the Supplier ID field. Supplier SetID STATE Supplier ID Item SetID STATE Item ID Item Description																																	
5.	Click the Search button to initiate the search for Contracts related to the selected Item or Supplier. Search Clear																																	
All of the Contracts with Lines for the selected Item or Supplier display in the Contract Details section. Contract Search Search Criteria SetID STATE Contract ID Contract Style Contract Process Option Administrator/Buyer Description Master Contract ID Contract Reference Type Corporate Contract Requisition Date 05/19/2025 Supplier SetID STATE Supplier ID Item SetID STATE Item ID 9687201397 Item Description Category Manufacturer ID Manufacturer's Item ID Supplier Item ID UPN ID Search Clear Contract Details Personalize Find View All First 1-10 of 40 Last Item Detail Contract Reference Contract Detail Item Information <table><tr><th>Select</th><th>Contract ID</th><th>Contract Version</th><th>Contract Reference Type</th><th>Category</th><th>Item ID</th><th>Item Description</th><th>Contract Base Price</th><th>Use Contract Base Price</th><th></th><th></th></tr><tr><td>☐</td><td>00000000000000000000000049344</td><td>4</td><td>Line Item</td><td>9687201</td><td>9687201397</td><td>SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER</td><td>240.00000</td><td>Y</td><td></td><td></td></tr><tr><td>☐</td><td>000000000000000000000000050200</td><td>2</td><td>Line Item</td><td>9687201</td><td>9687201397</td><td>SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER</td><td>385.00000</td><td>Y</td><td></td><td></td></tr></table>		Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price			☐	00000000000000000000000049344	4	Line Item	9687201	9687201397	SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER	240.00000	Y			☐	000000000000000000000000050200	2	Line Item	9687201	9687201397	SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER	385.00000	Y		
Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price																										
☐	00000000000000000000000049344	4	Line Item	9687201	9687201397	SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER	240.00000	Y																										
☐	000000000000000000000000050200	2	Line Item	9687201	9687201397	SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER	385.00000	Y																										
6.	Click the Contract Reference tab to view the Lines for each Contract as needed. Contract Details Item Detail Contract Reference Contract Detail Item Information																																	



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Step	Action																																	
7.	Click the Select checkbox option to the left of the applicable Line to use it on the Requisition. Only one Line can be selected for copying. Contract Details Personalize Find View All First 1-10 of 40 Last Item Detail Contract Reference Contract Detail Item Information <table><thead><tr><th>Select</th><th>Contract ID</th><th>Contract Version</th><th>Contract Reference Type</th><th>Category</th><th>Item ID</th><th>Item Description</th><th>Contract Base Price</th><th>Use Contract Base Price</th><th></th><th></th></tr></thead><tbody><tr><td>☒</td><td>000000000000000000000049344</td><td>4</td><td>Line Item</td><td>9687201</td><td>9687201397</td><td>SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER</td><td>240.00000 Y</td><td></td><td></td><td></td></tr><tr><td>☐</td><td>000000000000000000000050200</td><td>2</td><td>Line Item</td><td>9687201</td><td>9687201397</td><td>SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER</td><td>385.00000 Y</td><td></td><td></td><td></td></tr></tbody></table>	Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price			☒	000000000000000000000049344	4	Line Item	9687201	9687201397	SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER	240.00000 Y				☐	000000000000000000000050200	2	Line Item	9687201	9687201397	SNOW AND ICE REMOVAL SERVICES MULTI-AXLE (2 OR MORE REAR AXLE) W/CONTRACTOR PLOW&SPREADER	385.00000 Y			
Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price																										
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8.	Click the OK button at the bottom of the page. OK Cancel Refresh																																	
	A Message may display in a pop-up window explaining that there is a newly found best Contract. Click the Yes button to change Contracts or click the No button to continue with the selected Contract. Message Newly found best contract is different from existing contract. Do you want to change to new one? (10150,251) Yes No																																	
9.	The Item details from the selected Contract Line populate a new Requisition Line in the Line section. Line ? Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS <table><thead><tr><th>Line</th><th>Item</th><th>Description</th><th>Contract ID</th><th>Contract Version</th><th>Contract Line</th><th>Category Line Number</th><th>Use Contract if Available</th></tr></thead><tbody><tr><td>1</td><td>9687201397</td><td>SNOW AND ICE</td><td>000000000000000000000049344</td><td>4</td><td>1</td><td></td><td>☒</td></tr></tbody></table>	Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available	1	9687201397	SNOW AND ICE	000000000000000000000049344	4	1		☒																	
Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available																											
1	9687201397	SNOW AND ICE	000000000000000000000049344	4	1		☒																											
10.	Verify for accuracy and complete the Requisition by following Steps 8 - 24 of the Creating a Regular Requisition section of this Job Aid.																																	



Procurement Job Aid

PR342_Creating Regular Requisitions (VDOT Only)

Copying a Requisition

Step	Action
1.	Create a new Requisition by following steps 1 - 3 of the Creating a Regular Requisition section of this Job Aid.
2.	Click the Copy From link. Business Unit 50100 *WebIMS Req Type Regular Requisition ID NEXT Requisition Name Copy From

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

Maintain Requisitions

Copy Requisition

Header

Business Unit 50100

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID STATE [Supplier Lookup](#)

Supplier ID [Supplier Details](#)

Item SetID STATE

Item Description

Department

Origin

To

Supplier Name

Item ID

☐ Direct Ship

Search

Requisition

[Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Export](#)

First 1 of 1 Last

Sel	Req ID	Requisition Name	Status	Origin	Requester
☐					

OK

Cancel

Refresh

3.	Enter the Requisition ID Number of the Requisition to copy in the Requisition ID field. Requisition ID 0002410696
4.	Click the Search button. Search



Procurement Job Aid

PR342_Creating Regular Requisitions (VDOT Only)

Step	Action																																							
5.	Click the Select checkbox option to select the Requisition to be copied. Requisition Personalize Find View All First 1 of 1 Last <table><tr><th>Sel</th><th>Req ID</th><th>Requisition Name</th><th>Status</th><th>Origin</th><th>Requester</th></tr><tr><td>☒</td><td>0002410696</td><td>Roofing Asphalt</td><td>Open</td><td>ONL</td><td>00020828000</td></tr></table>	Sel	Req ID	Requisition Name	Status	Origin	Requester	☒	0002410696	Roofing Asphalt	Open	ONL	00020828000																											
Sel	Req ID	Requisition Name	Status	Origin	Requester																																			
☒	0002410696	Roofing Asphalt	Open	ONL	00020828000																																			
6.	Click the OK button. OK Cancel Refresh																																							
The Maintain Requisitions Requisition page displays with all of the copied information and Line(s). Requisition Business Unit 50100 *WebIMS Req Type Regular Status Open Requisition ID NEXT Requisition Name Copy From ☐ Hold From Further Processing Header *Requester 00020828000 Doe, John *Requisition Date 05/23/2025 Requisition Info Origin ONL Online Input *Currency Code USD Dollar Requisition Defaults Add Comments Requisition Activities Amount Summary Total Amount 25,005.00 USD Add Items From Purchasing Kit Catalog Item Search Requester Items Line Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS <table><tr><th>Line</th><th>Item</th><th>Description</th><th>Quantity</th><th>*UOM</th><th>Category</th><th>Price</th><th>Merchandise Amount</th><th>Status</th><th></th><th></th><th></th><th></th></tr><tr><td>1</td><td>7702603018</td><td>COATINGS, ROOF</td><td>500.0000</td><td>CA</td><td>7702603</td><td>0.01000</td><td>5.00</td><td>Open</td><td></td><td></td><td></td><td></td></tr><tr><td>2</td><td>9189101000</td><td>ROOFING</td><td>1.0000</td><td>HUR</td><td>9189101</td><td>25,000.0000</td><td>25,000.00</td><td>Open</td><td></td><td></td><td></td><td></td></tr></table>		Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					1	7702603018	COATINGS, ROOF	500.0000	CA	7702603	0.01000	5.00	Open					2	9189101000	ROOFING	1.0000	HUR	9189101	25,000.0000	25,000.00	Open				
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status																																
1	7702603018	COATINGS, ROOF	500.0000	CA	7702603	0.01000	5.00	Open																																
2	9189101000	ROOFING	1.0000	HUR	9189101	25,000.0000	25,000.00	Open																																
7.	Verify for accuracy and complete the Requisition following steps 8 - 24 of the Creating a Regular Requisition section of this Job Aid.																																							



Procurement Job Aid

PR342_Creating Regular Requisitions (VDOT Only)

Adding Comments and Attachments to a Requisition Header

Header comments and attachments apply to the Requisition as a whole. This section starts on the **Maintain Requisitions Requisition** page in the **Header** section.

1. Click the **Add Comments** link.

[Requisition Defaults](#)
[Requisition Activities](#)

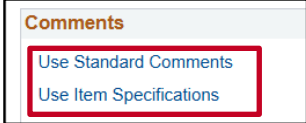
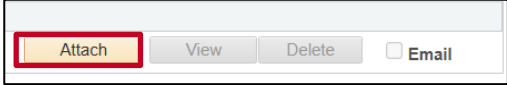
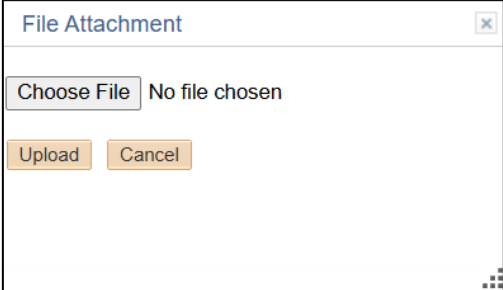
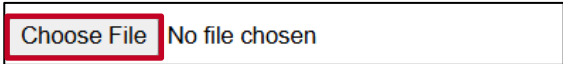
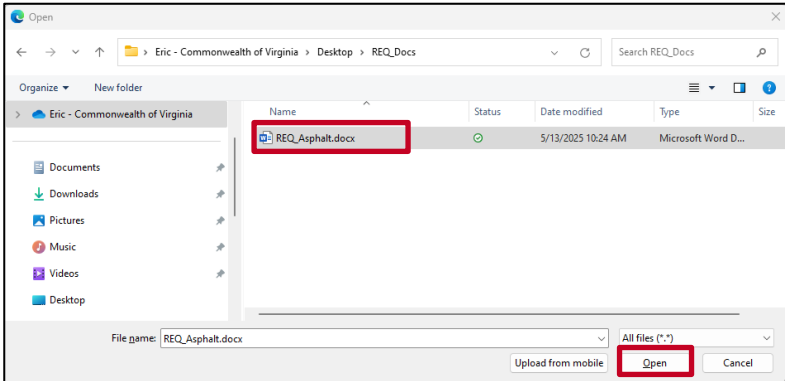
[Add Comments](#)

The **Header Comments** page displays in a pop-up window.

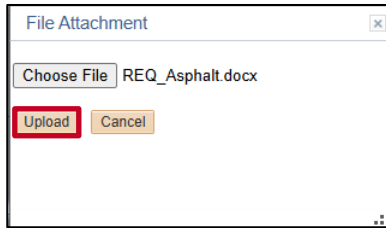
2. Click the **Send to Supplier** checkbox option to include the comments and attachments on associated Purchase Orders or Strategic Sourcing Events.

☐ **Send to Supplier** ☐ Show at Receipt
☐ Show at Voucher

3. Enter the applicable comments in the **Comments** field.

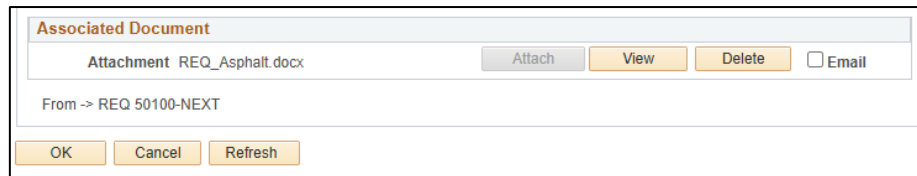
	The Use Standard Comments and Use Item Specifications links are available to add standard text as needed. 
4.	Click the Attach button to add attachments such as specification documents or images. 
The File Attachment page displays in a pop-up window. 	
5.	Click the Choose File button. 
6.	Navigate to the applicable location, select the desired file to attach, and then click the Open button. 
	For a list of the file extensions that are allowed as attachments in Cardinal, see the Appendix section at the end of this Job Aid.

7. Click the **Upload** button.



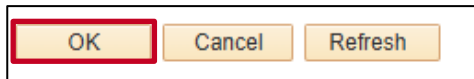
A screenshot of a 'File Attachment' dialog box. It has a title bar with a close button. Inside, there is a 'Choose File' button followed by the text 'REQ_Aspphalt.docx'. Below this, there are two buttons: 'Upload' (highlighted with a red rectangle) and 'Cancel'.

The **Associated Document** section refreshes and displays the name of the attachment.



A screenshot of the 'Associated Document' section. It has a title bar. Below the title bar, there is a table with one row: 'Attachment REQ_Aspphalt.docx'. To the right of the table are buttons: 'Attach', 'View', 'Delete', and a checkbox for 'Email'. Below the table, it says 'From -> REQ 50100-NEXT'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Refresh'.

8. Click the **OK** button to save the changes and close the **Header Comments** page.



A screenshot of a dialog box with three buttons: 'OK' (highlighted with a red rectangle), 'Cancel', and 'Refresh'.



Procurement Job Aid

PR342_Creating Regular Requisitions (VDOT Only)

Adding Comments and Attachments to a Requisition Line

Line comments and attachments apply to an individual Line. This section starts on the **Maintain Requisitions Requisition** page in the **Line** section.

1. Click the **Line Comments** icon on a Line to enter comments or add attachments if needed.

The screenshot shows the 'Line' section of a requisition. The table lists items with columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first line item is highlighted. A red box highlights the 'Line Comments' icon (a speech bubble) in the right-hand column of the table.

The **Line Comments** page displays.

The 'Line Comments' page displays the following information:

- Business Unit: 50100
- Requisition Date: 05/12/2025
- 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 | Use Item Specifications

Comment Status: Active | Inactivate

Send to Supplier | Show at Receipt

Send to Supplier | Show at Voucher

Associated Document: Attachment | Attach | View | Delete | Email

From -> REQ 50100-NEXT

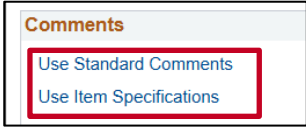
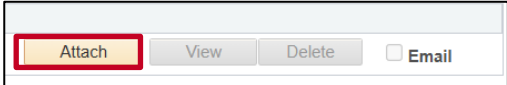
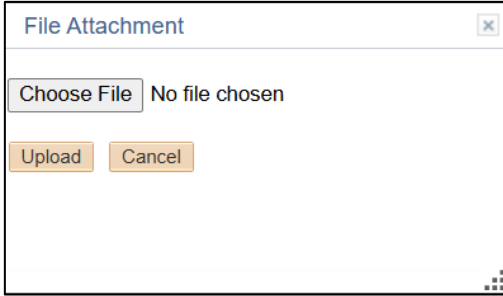
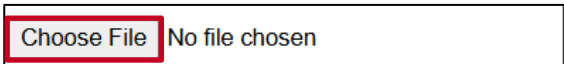
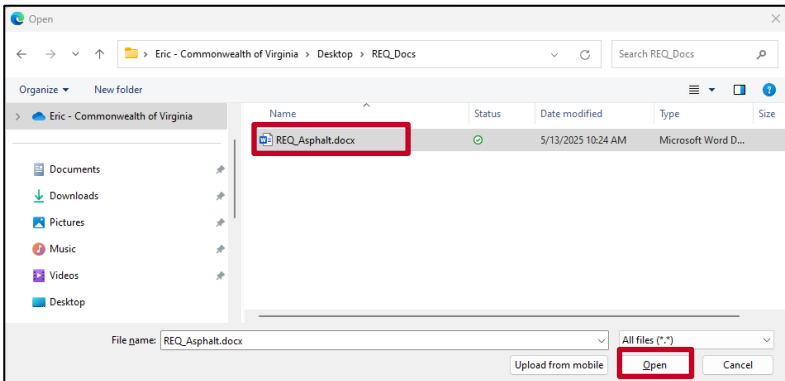
OK | Cancel | Refresh

2. Click the **Send to Supplier** checkbox option to include the comments and attachments on associated Purchase Orders or Strategic Sourcing Events.

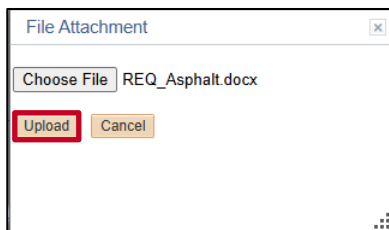
The screenshot shows three checkboxes: ☒ Send to Supplier, ☐ Show at Receipt, and ☐ Show at Voucher. The 'Send to Supplier' checkbox is highlighted with a red box.

3. Enter the applicable comments in the **Comments** field.

The screenshot shows the 'Comments' section of the page. A red box highlights the large text input area for entering comments.

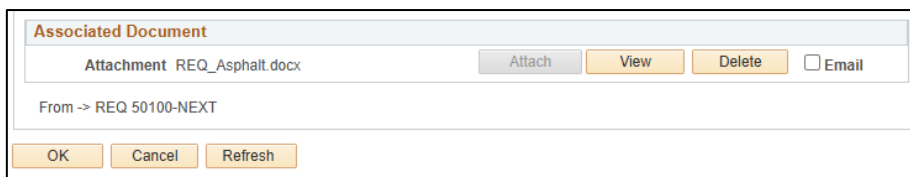
	The Use Standard Comments and Use Item Specifications links are available to add standard text as needed. 
4.	Click the Attach button to add attachments such as specification documents or images. 
The File Attachment page displays in a pop-up window. 	
5.	Click the Choose File button. 
6.	Navigate to the applicable location, select the desired file to attach, and then click the Open button. 
	For a list of the file extensions that are allowed as attachments in Cardinal, see the Appendix section at the end of this Job Aid.

7. Click the **Upload** button.



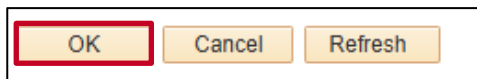
A dialog box titled "File Attachment" with a close button (X) in the top right corner. It contains a "Choose File" button followed by the text "REQ_Aspphalt.docx". Below this, there are two buttons: "Upload" (highlighted with a red border) and "Cancel".

The **Associated Document** section refreshes and displays the name of the attachment.



A section titled "Associated Document" with a light blue header. Below the header, there is a table with one row: "Attachment REQ_Aspphalt.docx". To the right of the table are buttons: "Attach" (disabled), "View", "Delete", and a checkbox for "Email". Below the table, it says "From -> REQ 50100-NEXT". At the bottom are three buttons: "OK" (highlighted with a red border), "Cancel", and "Refresh".

8. Click the **OK** button to save the changes and close the **Line Comments** page.



A row of three buttons: "OK" (highlighted with a red border), "Cancel", and "Refresh".



Appendix: Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. 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 for 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