PR342_Creating Regular Requisitions (VDOT Only)

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

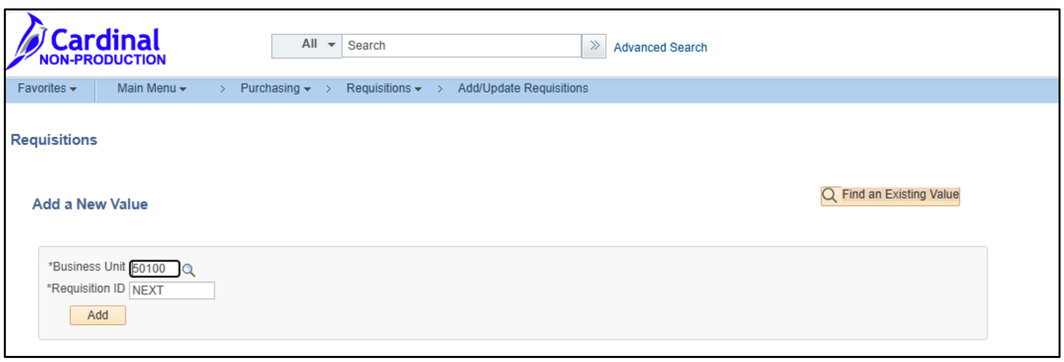
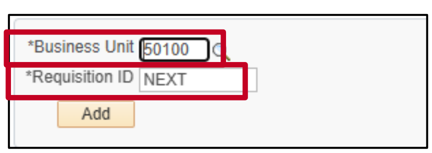
Revision Date	Summary of Changes
10/21/2025	Baseline.

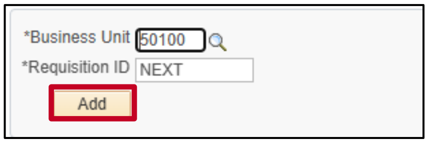
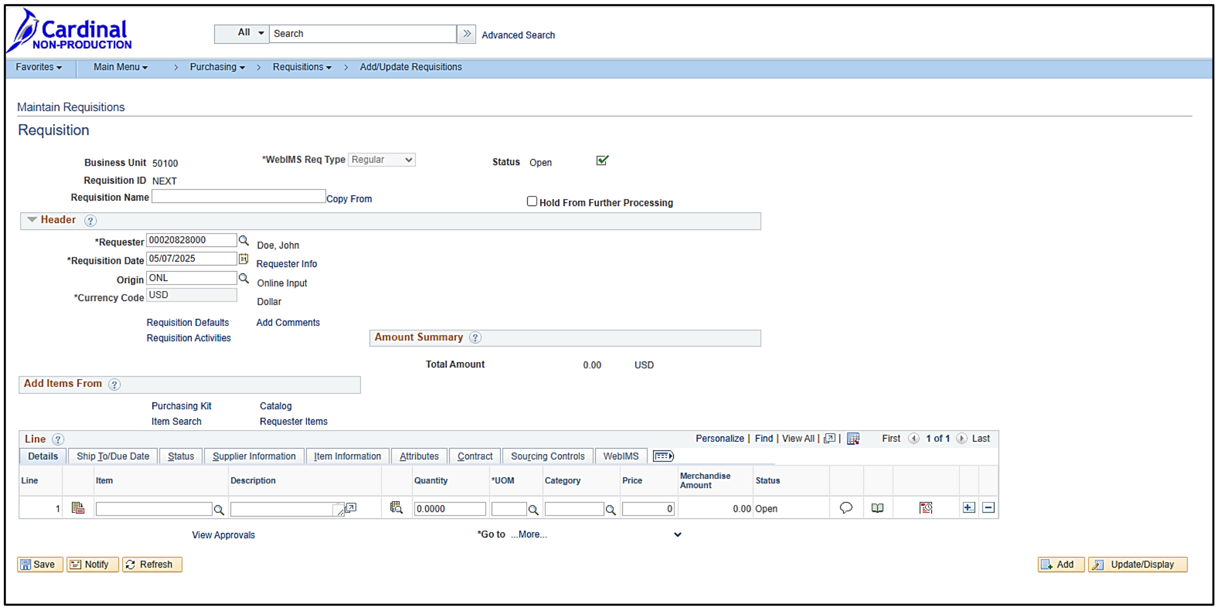
Creating a Regular Requisition

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**.

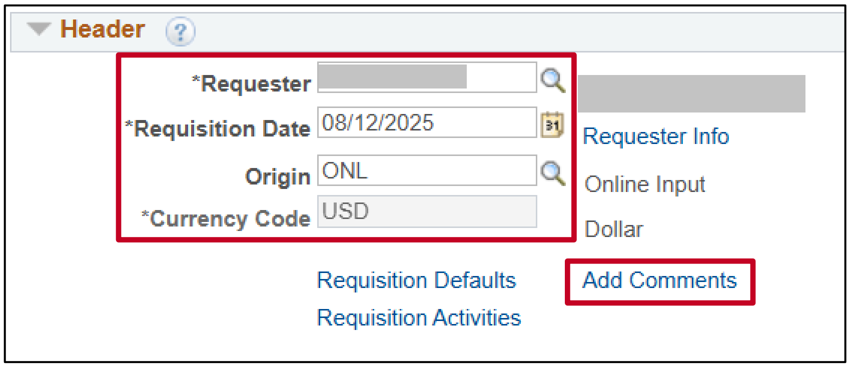
For non-inventory items and services, a Requisition is used to assign buyers and track the progress and status of a purchase request. Requisitions can be created from existing Contracts, copied from other Requisitions, or created ad hoc. All Requisitions must be approved by a supervisor before they can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

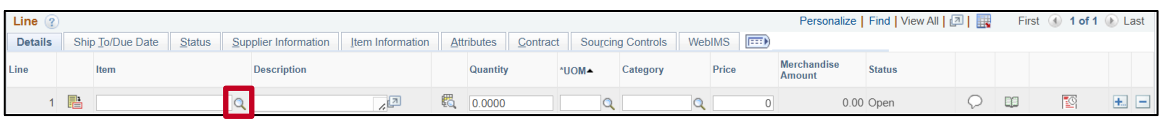
All Suppliers are shared across the Commonwealth in one centralized database maintained by the Commonwealth Vendor Group (CVG). A Supplier must be added to Cardinal before it can be used on a Purchase Order, Strategic Sourcing Event, Voucher, or Payment. However, a Supplier is not required when creating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

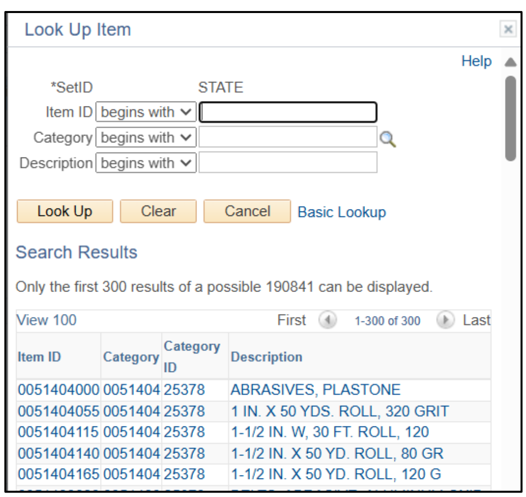
Step	Action
2.	Click the **Add** button. 
The **Maintain Requisitions Requisition** page displays.  	
3.	Enter a descriptive title for the Requisition in the **Requisition Name** field. Otherwise, the Requisition name will default to the same as the Requisition ID Number once saved. 

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.

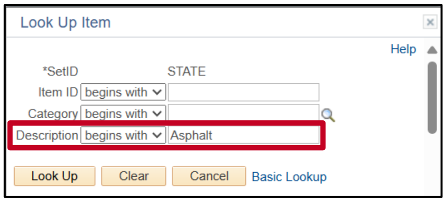




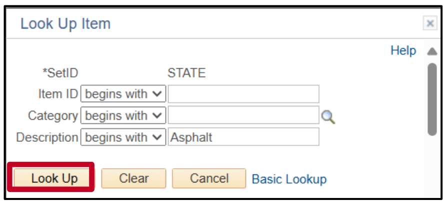
The **Look Up Item** page displays in a pop-up window.



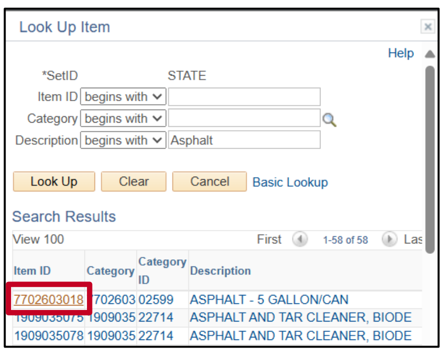
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Enter key search information in the Description field.



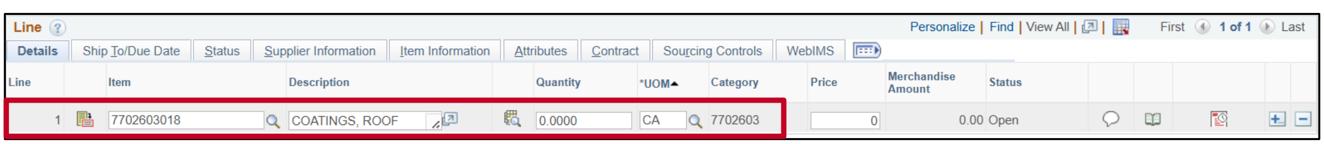
</td></tr>
<tr><td>6.</td><td>Click the Look Up button.



</td></tr>
<tr><td>7.</td><td>The search results display. Click the link within the Item ID field to select the applicable Item.



</td></tr>
<tr><td colspan="2">The Maintain Requisitions Requisition page redisplays with the Item populated for Line 1 in the Line section.

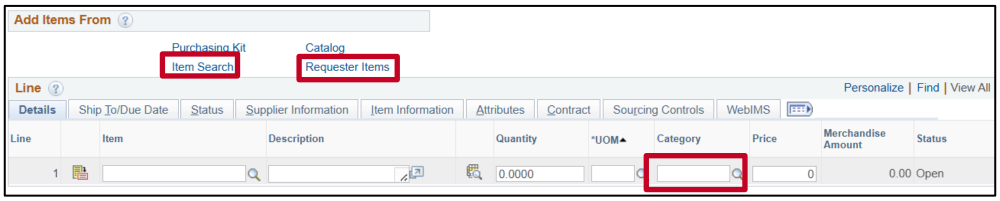


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

Other options for looking up Items include:

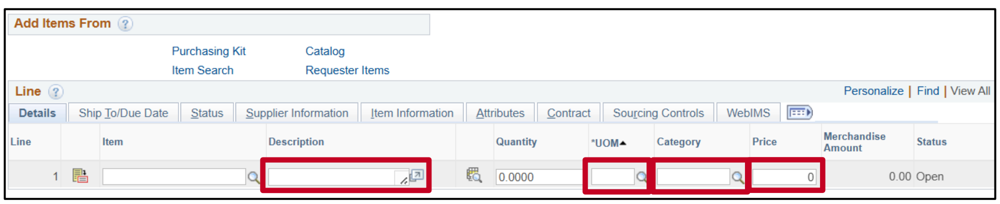
- Looking up the NIGP Category in the **Category** field on each Line
- Using the **Item Search** link to search by Category, Description, or Item ID
- Using the **Requester Items** link which lists Items the Requester has previously requested

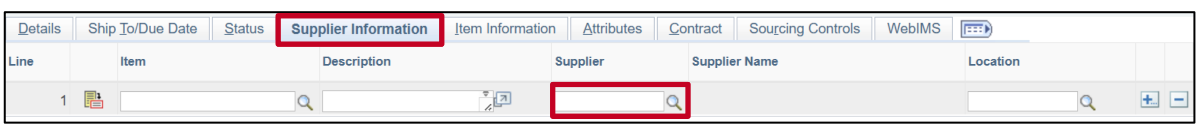


Note: The **Purchasing Kit** and **Catalog** links are not generally used.

</td></tr>
<tr><td></td><td>

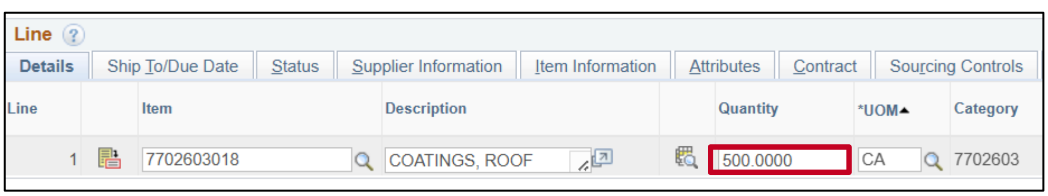
If an Item is not found, use the appropriate Category Code and enter the unlisted Item's Description, UOM, and estimated Price on the **Details** tab. Also, enter the Supplier ID in the **Supplier** field in the **Supplier Information** tab.





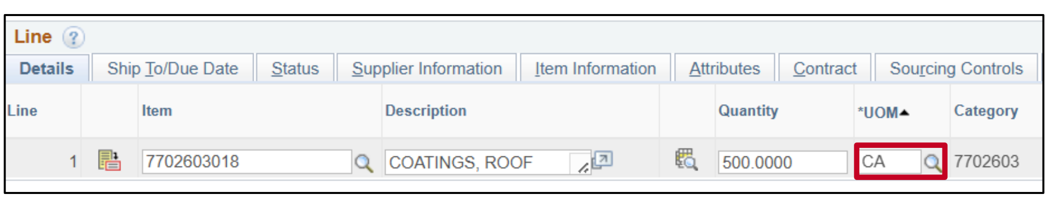
</td></tr>
<tr><td>8.</td><td>

Enter the applicable quantity in the **Quantity** field.

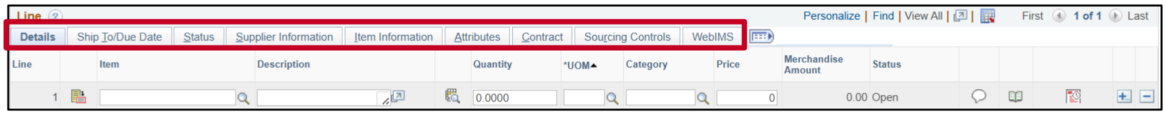
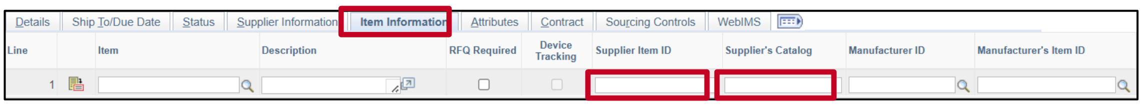
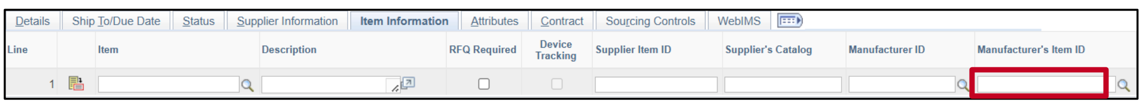
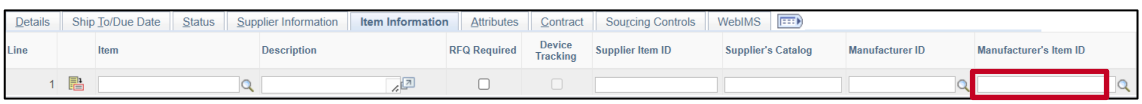
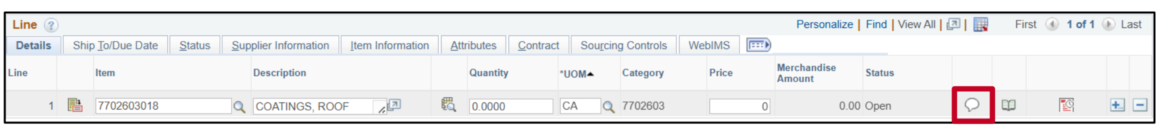
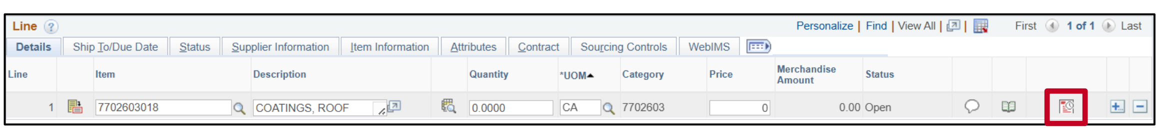


</td></tr>
<tr><td></td><td>

Note that the **UOM** (Unit of Measurement) field displays how the price per quantity is calculated (e.g., "EA" (Each), "CA" (Can), etc.).

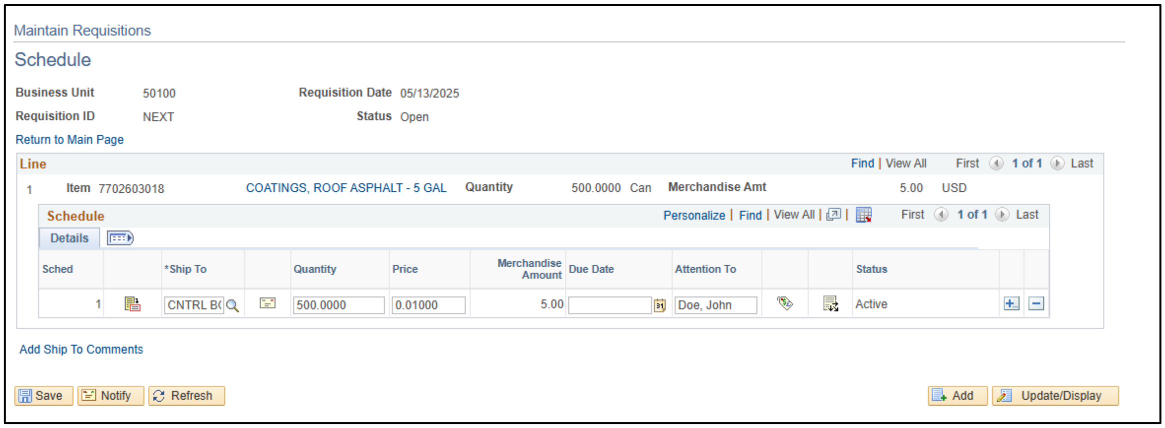


</td></tr>
</table>

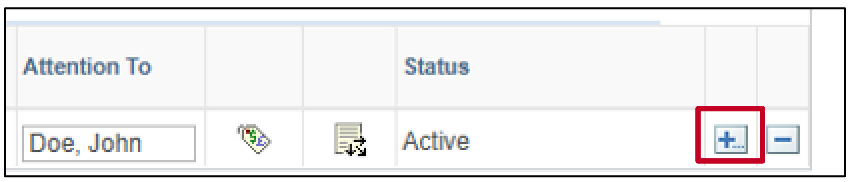
Step	Action
	In the **Line** section, there are multiple tabs which contain information: **Details**, **Ship To/Due Date**, **Status**, **Supplier Information**, **Item Information**, **Attributes**, **Contract**, **Sourcing Controls**, and **WebIMS** (for WebIMS-related Requisitions). 
	The **Item Information**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

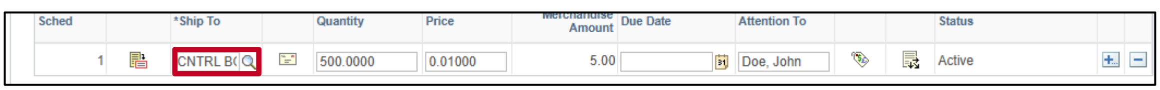


(i) Never click the **Add a New Row** icon to add a Schedule.

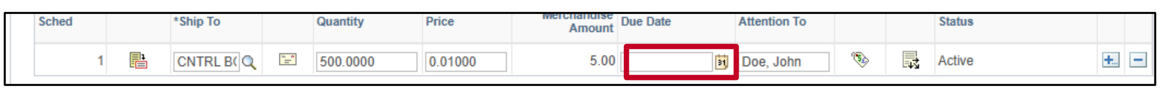


There should only be one Schedule per Requisition Line because the interface with eVA does not permit such an action and will cause the subsequent Purchase Order to error out. Create another Requisition Line for each separate Schedule required.

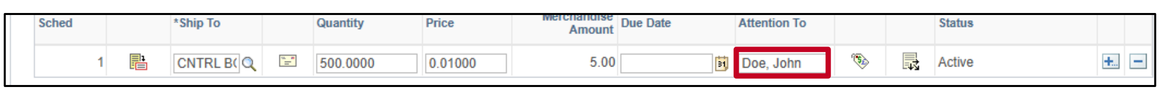
10. Verify the defaulted delivery location in the **Ship To** field. Update as needed.



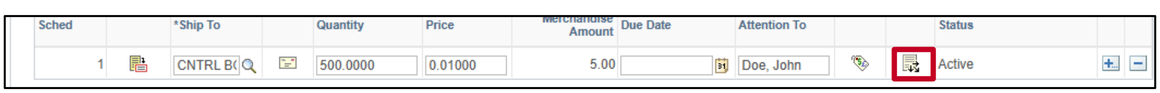
11. Click the **Due Date Calendar** icon and select the desired delivery date.

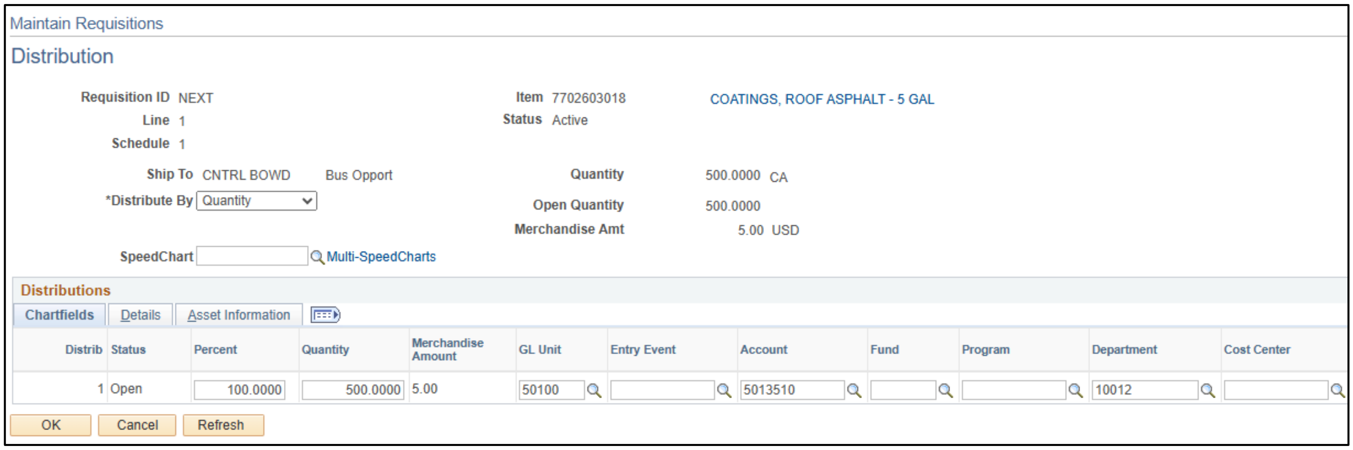
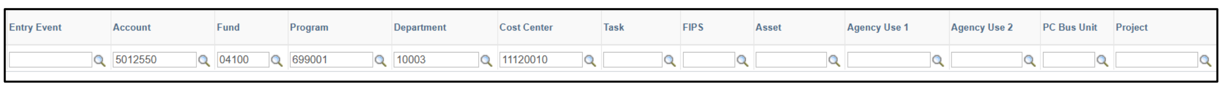
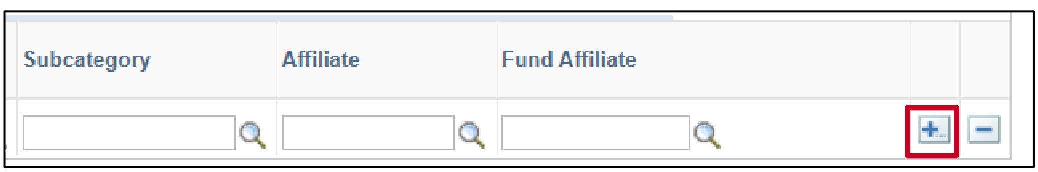
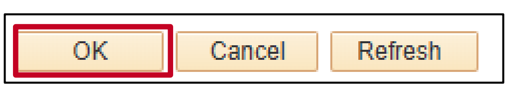


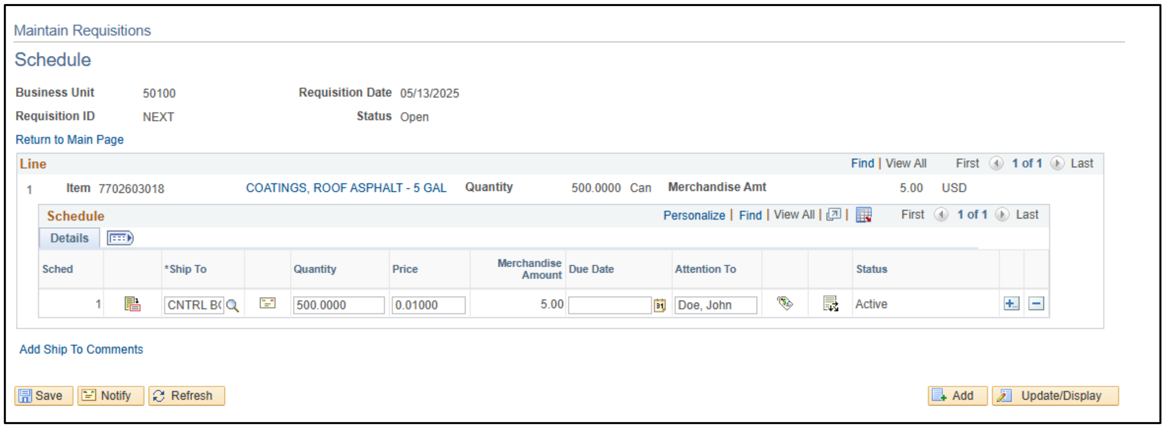
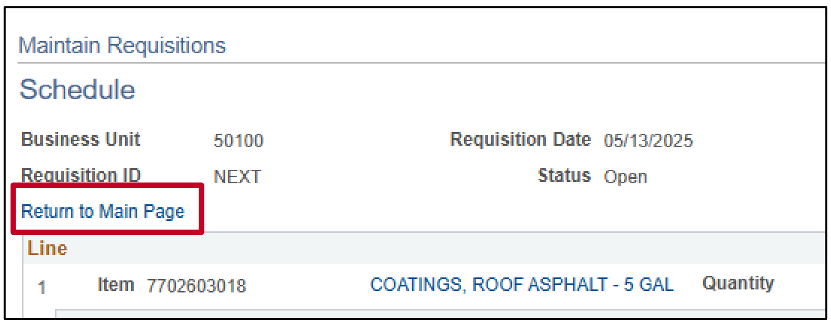
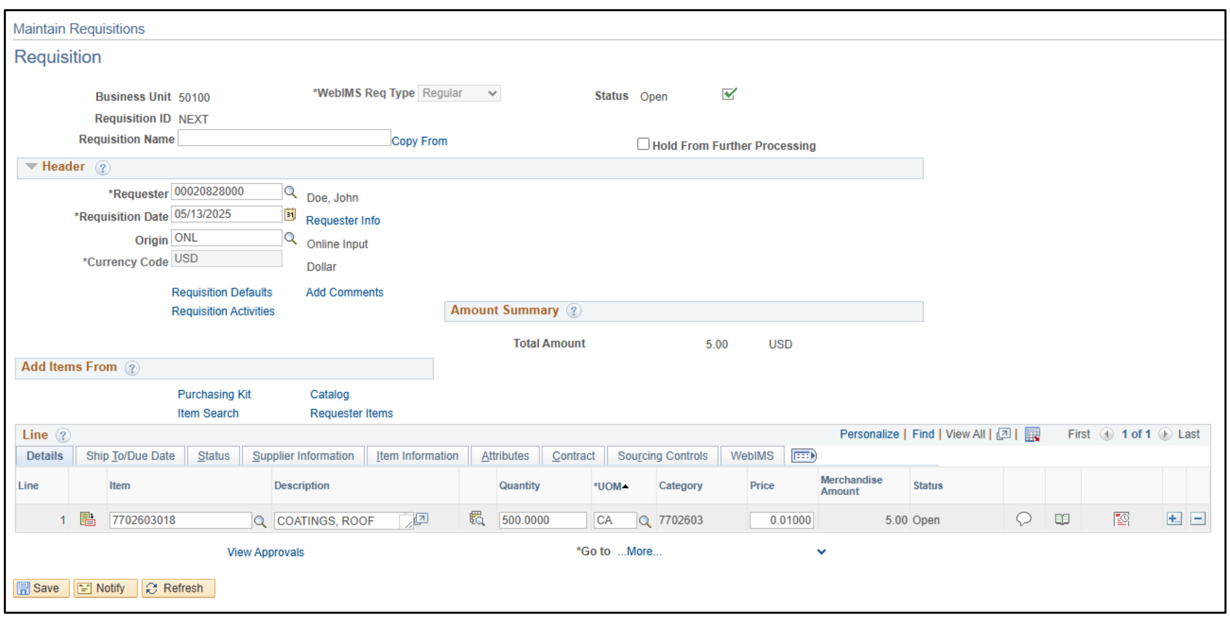
12. The **Attention To** field defaults to the user creating the Requisition. Update as needed.

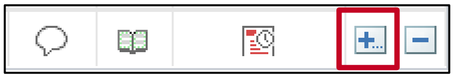
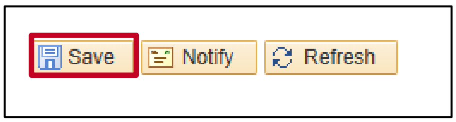
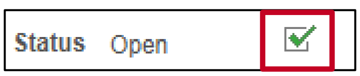
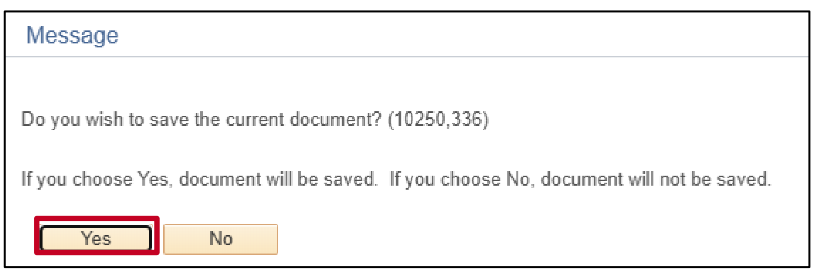
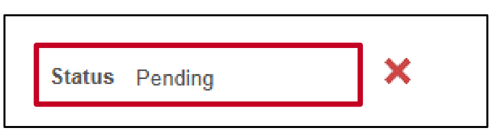


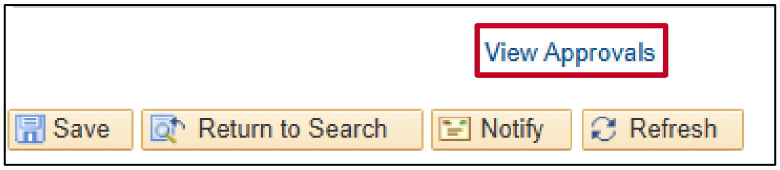
13. Click the **Distribution** icon to enter the accounting distribution for the Line.



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. 

Step	Action
	The **Maintain Requisitions Schedule** page redisplays. 
17.	Click the **Return to Main Page** link. 
	The **Maintain Requisitions Requisition** page redisplays. 

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 redisplays. The **Status** field is updated to “Pending” and the **Submit for Approval** icon disappears.  	

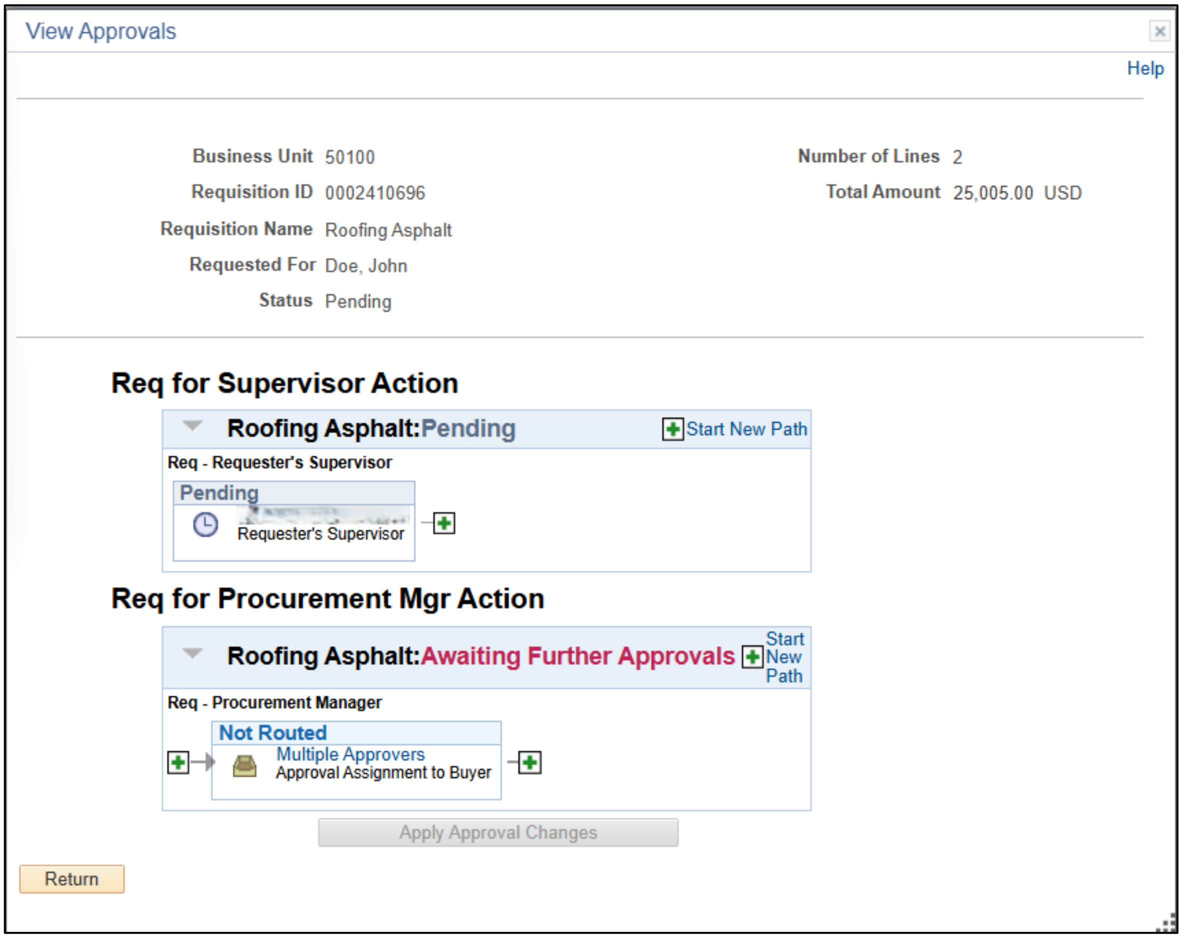
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22.</td><td>Click the View Approvals link.

</td></tr>
<tr><td>23.</td><td>A Message displays in a pop-up window.
Click the Yes button to save the Requisition and view the approval monitor.

</td></tr>
</table>

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.

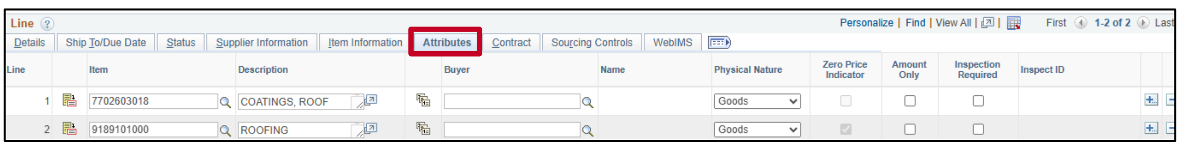
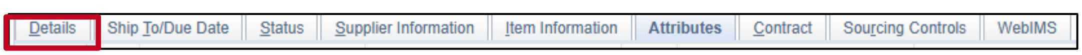


Creating an Amount Only Requisition Line

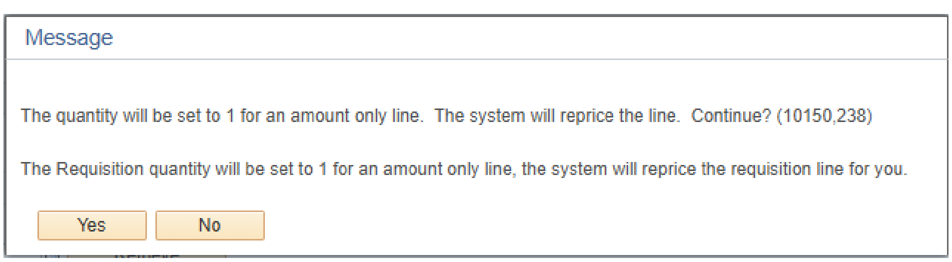
A requested Item may need to be invoiced as a single amount of money or as different amounts of money over time. In this case, use the **Amount Only** checkbox option. Requesting and ordering with the **Amount Only** checkbox option selected allows the Line to be received only by invoiced amount (dollars)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

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

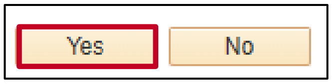
- The **Quantity** is set to “1” for an amount only Line and Quantity becomes unavailable for entry. The line is repriced accordingly
- The **Price** field on the Line is available for entry
- The price entered becomes the schedule price and amount
- The **Distribute By** field, located on the **Distribution** 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.

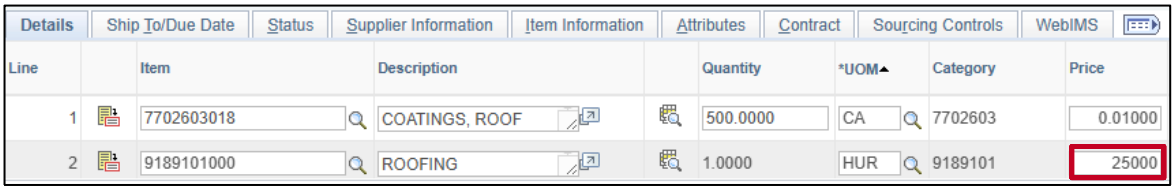


5. Click the **Yes** button to close the **Message**.



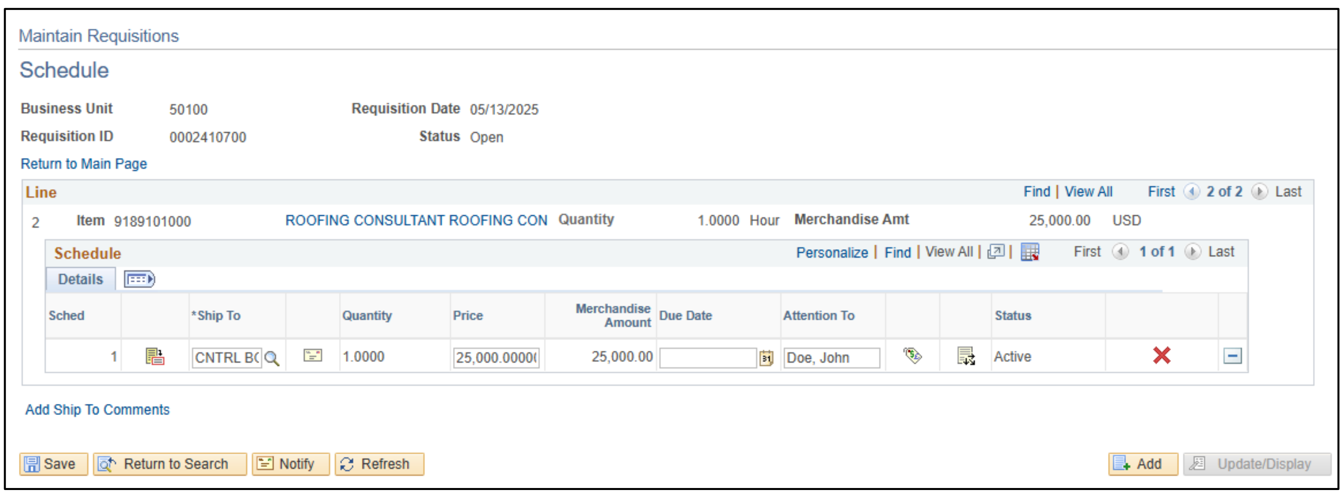
6. The **Details** tab redisplays.

Enter the total amount in the **Price** field.



7. Click the **Schedule** icon.

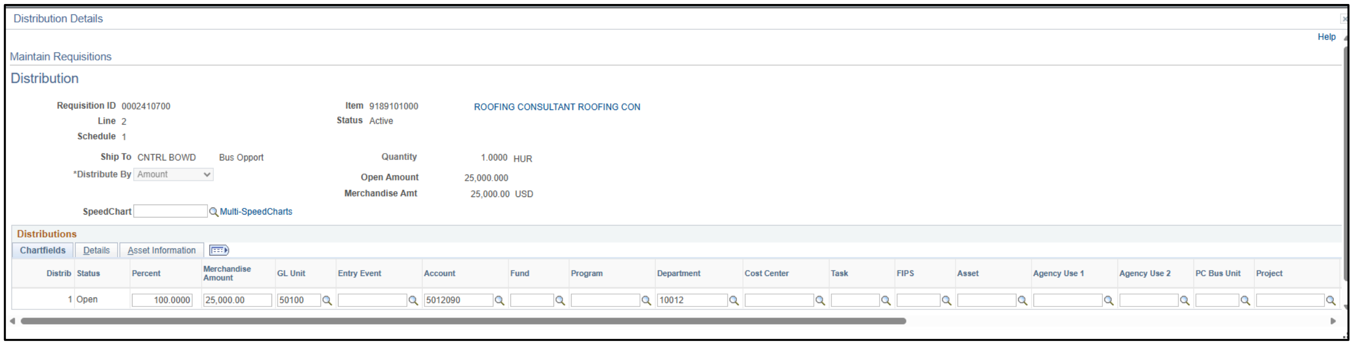
The **Maintain Requisitions Schedule** page displays.

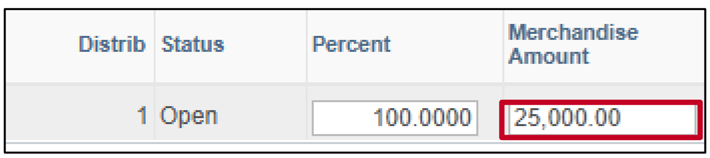


8. Complete the **Maintain Requisitions Schedule** page by following Steps 9 - 12 in the [Creating a Regular Requisition](#) section in this Job Aid.

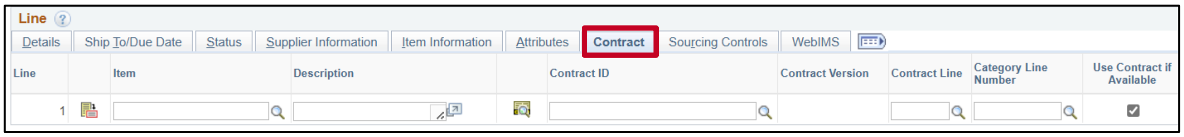
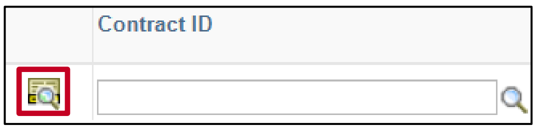
9. Click the **Distribution** icon.

The **Maintain Requisitions Distribution** page displays.

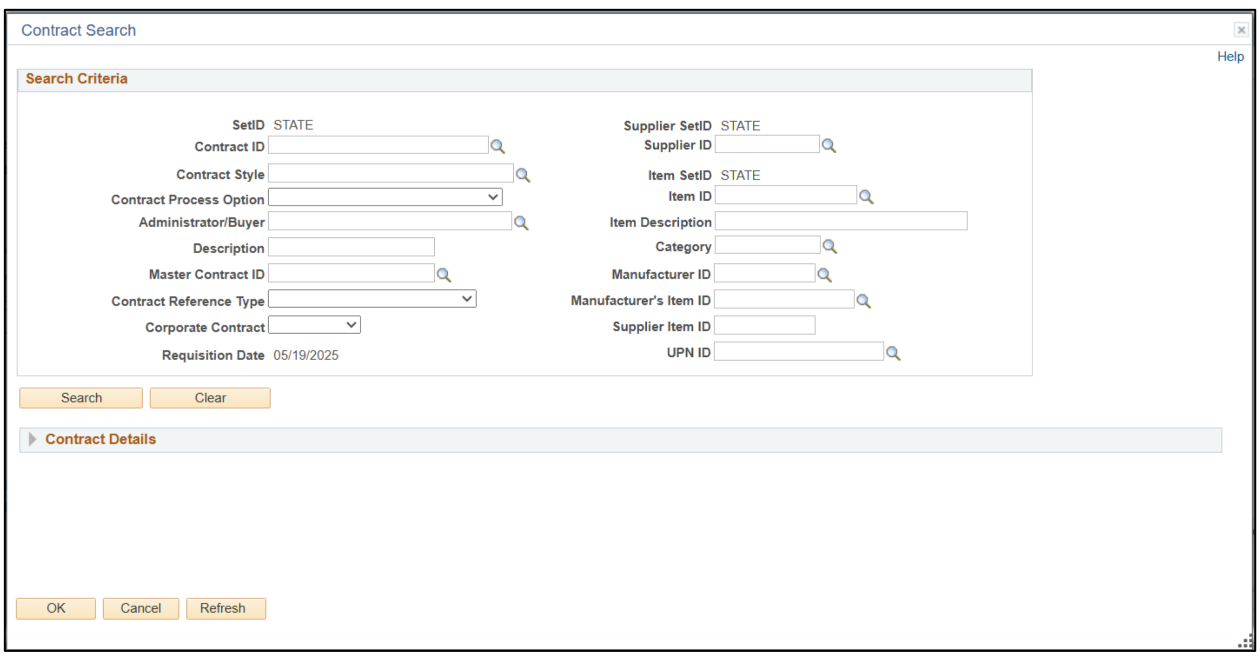


	Note that the **Distribute By** field is set to “Amount” and cannot be modified. 
10.	Set the **Merchandise Amount** field to the total price as needed. 
	Complete the process for creating a Regular Requisition by following Steps 14 - 24 in the <u>Creating a Regular Requisition</u> section of this Job Aid.

Creating a Requisition from a Contract

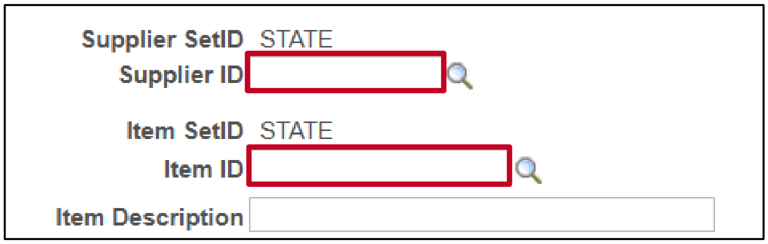
Step	Action
1.	Create a new Requisition by following Steps 1 - 3 of the Creating a Regular Requisition section of this Job Aid.
2.	Click the **Contract** tab in the **Line** section. 
3.	Click the **Contract Search** icon. 

The **Contract Search** page displays.



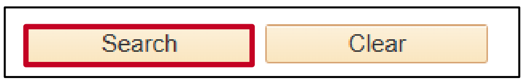
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4.</td><td>

Enter the applicable Item ID in the **Item ID** field or the desired Supplier in the **Supplier ID** field.



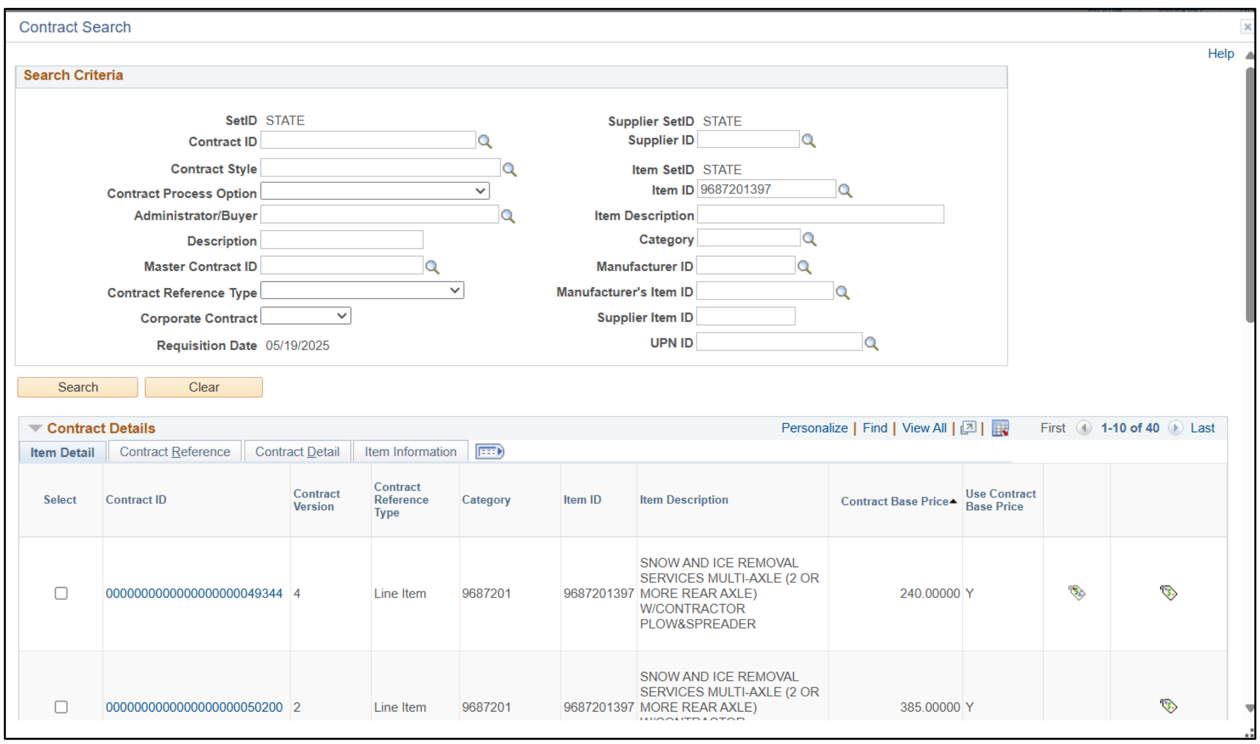
</td></tr>
<tr><td>5.</td><td>

Click the **Search** button to initiate the search for Contracts related to the selected Item or Supplier.



</td></tr>
<tr><td colspan="2">

All of the Contracts with Lines for the selected Item or Supplier display in the **Contract Details** section.



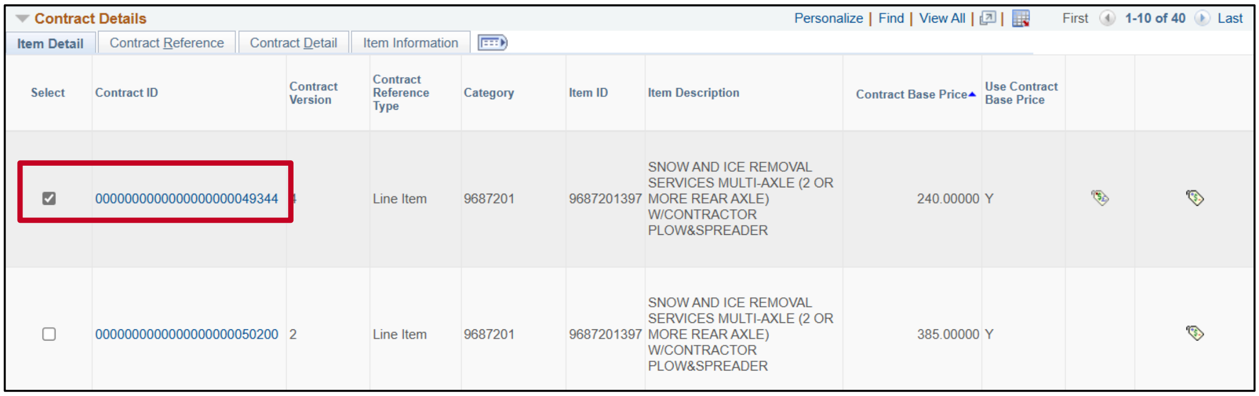
</td></tr>
<tr><td>6.</td><td>

Click the **Contract Reference** tab to view the Lines for each Contract as needed.

</td></tr>
</table>

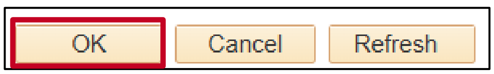
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>

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.



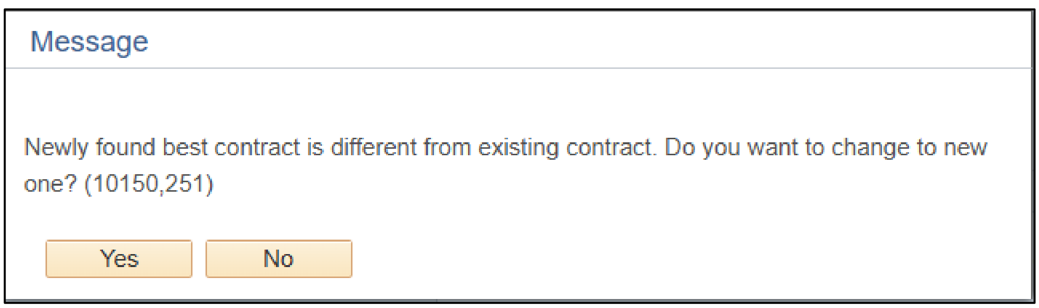
</td></tr>
<tr><td>8.</td><td>

Click the **OK** button at the bottom of the page.



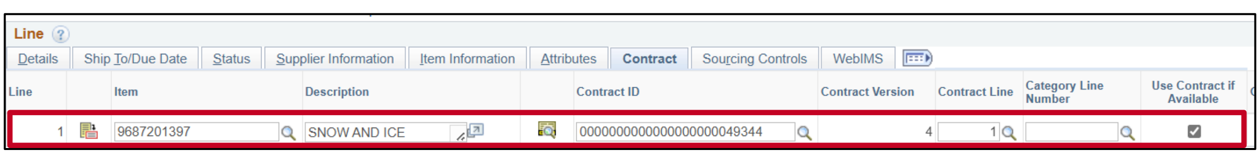
</td></tr>
<tr><td></td><td>

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.



</td></tr>
<tr><td>9.</td><td>

The Item details from the selected Contract Line populate a new Requisition Line in the **Line** section.



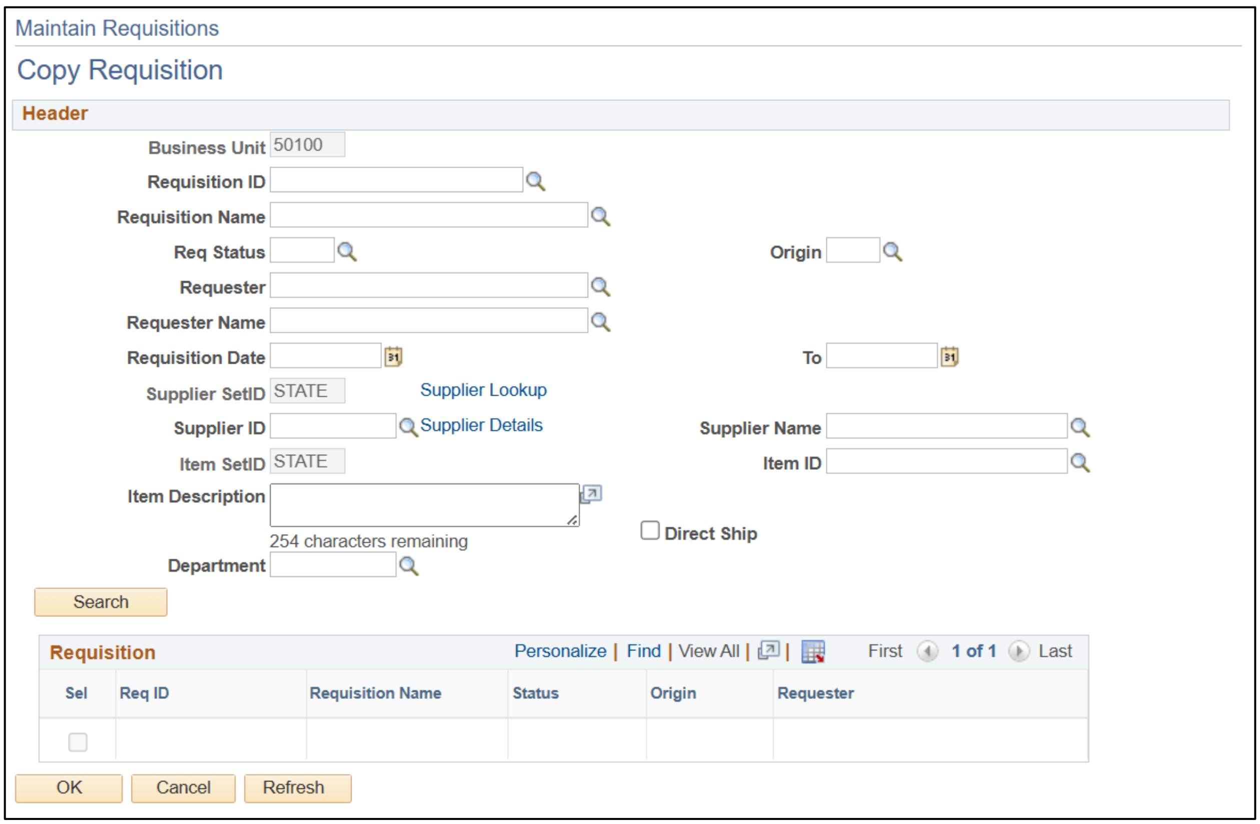
</td></tr>
<tr><td>10.</td><td>

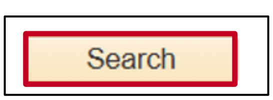
Verify for accuracy and complete the Requisition by following Steps 8 - 24 of the <u>Creating a Regular Requisition</u> section of this Job Aid.

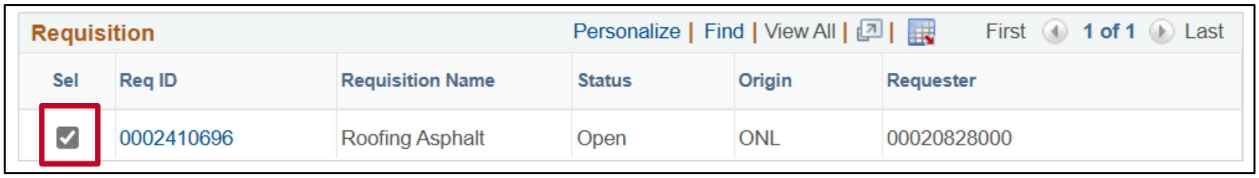
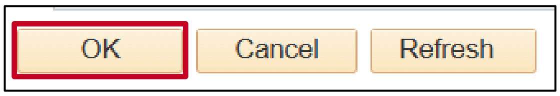
</td></tr>
</table>

Copying a Requisition

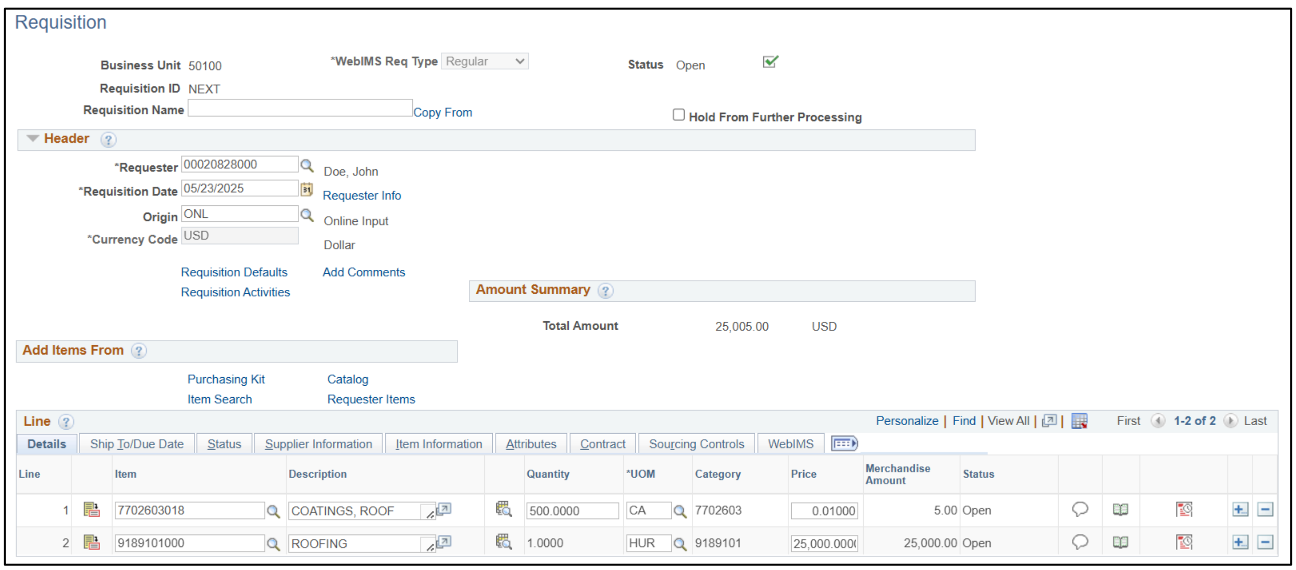
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Create a new Requisition by following steps 1 - 3 of the Creating a Regular Requisition section of this Job Aid.</td></tr>
<tr><td>2.</td><td>Click the Copy From link.

</td></tr>
<tr><td colspan="2">The Maintain Requisitions Copy Requisition page displays.

</td></tr>
<tr><td>3.</td><td>Enter the Requisition ID Number of the Requisition to copy in the Requisition ID field.

</td></tr>
<tr><td>4.</td><td>Click the Search button.

</td></tr>
</table>

Step	Action
5.	Click the **Select** checkbox option to select the Requisition to be copied. 
6.	Click the **OK** button. 

The **Maintain Requisitions Requisition** page displays with all of the copied information and Line(s).



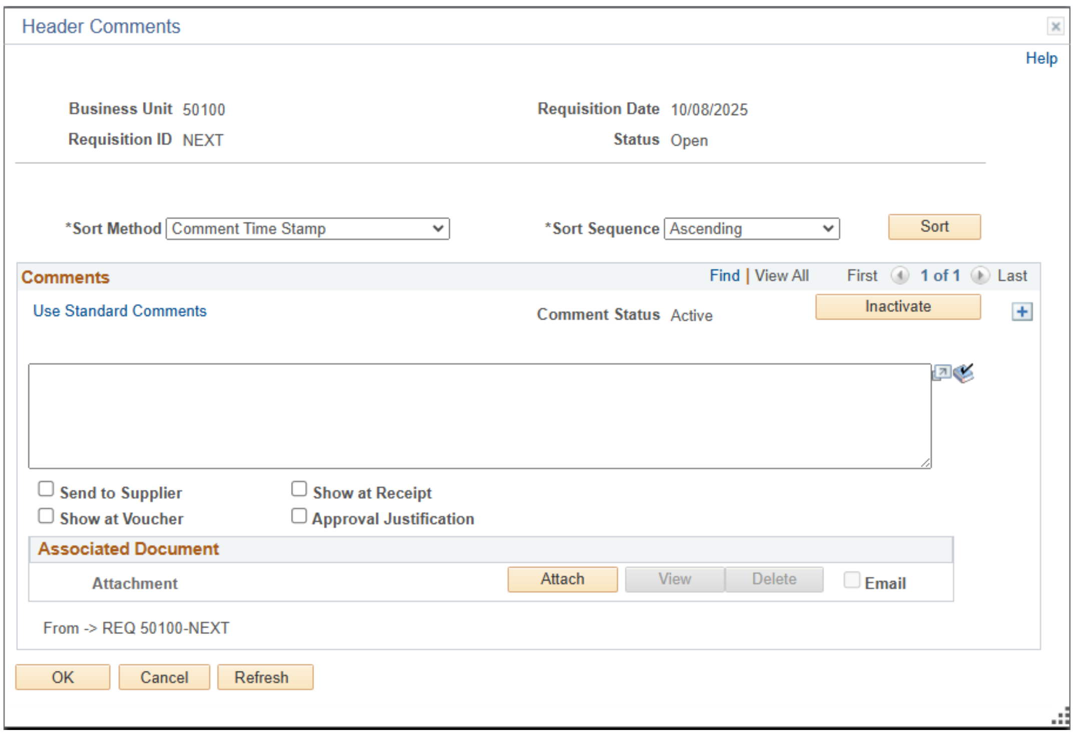
7.	Verify for accuracy and complete the Requisition following steps 8 - 24 of the [Creating a Regular Requisition]() section of this Job Aid.

Adding Comments and Attachments to a Requisition Header

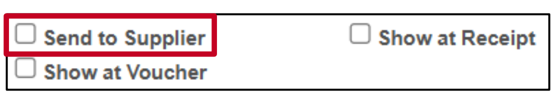
Header comments and attachments apply to the Requisition as a whole. This section starts on the **Maintain Requisitions Requisition** page in the **Header** section.

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

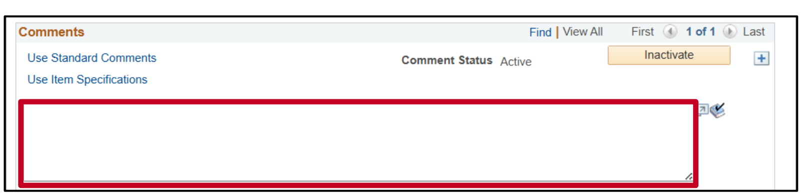
The **Header Comments** page displays in a pop-up window.

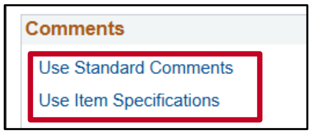
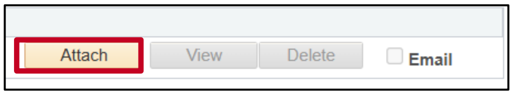
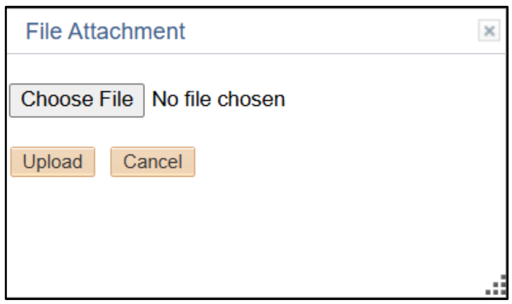
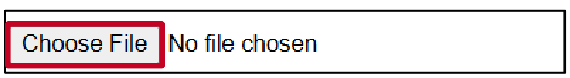
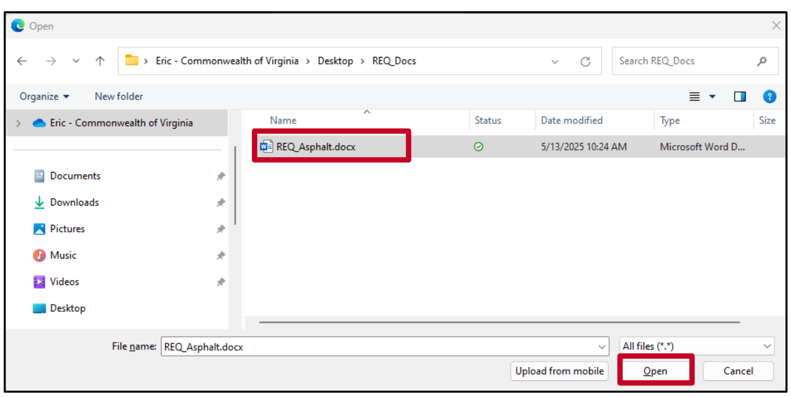


2. Click the **Send to Supplier** checkbox option to include the comments and attachments on associated Purchase Orders or Strategic Sourcing Events.

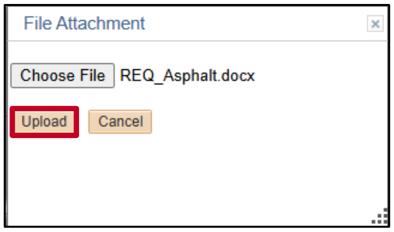


3. Enter the applicable comments in the **Comments** field.



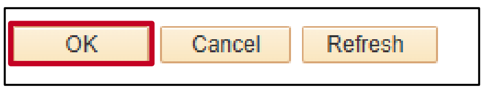
	The **Use Standard Comments** and **Use Item Specifications** links are available to add standard text as needed. 
4.	Click the **Attach** button to add attachments such as specification documents or images. 
The **File Attachment** page displays in a pop-up window. 	
5.	Click the **Choose File** button. 
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.



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

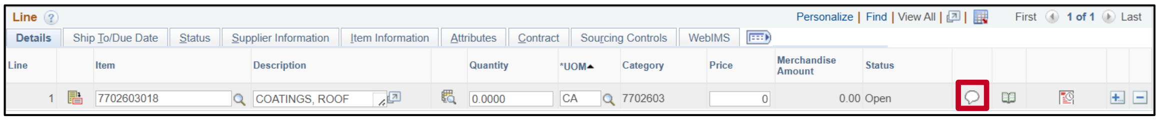
8. Click the **OK** button to save the changes and close the **Header Comments** page.



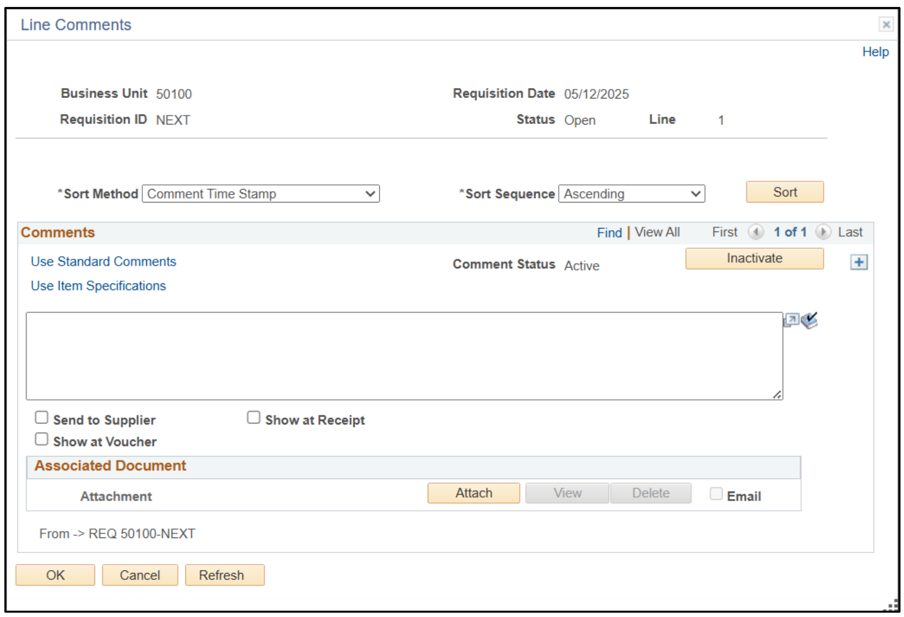
Adding Comments and Attachments to a Requisition Line

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

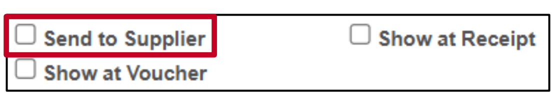
1. Click the **Line Comments** icon on a Line to enter comments or add attachments if needed.



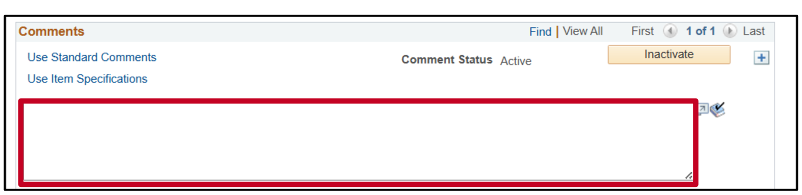
The **Line Comments** page displays.



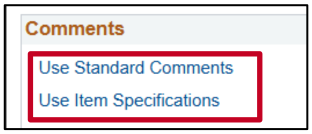
2. Click the **Send to Supplier** checkbox option to include the comments and attachments on associated Purchase Orders or Strategic Sourcing Events.



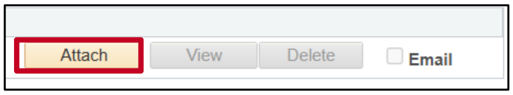
3. Enter the applicable comments in the **Comments** field.



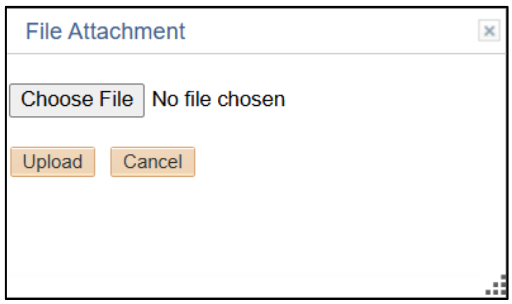
The **Use Standard Comments** and **Use Item Specifications** links are available to add standard text as needed.



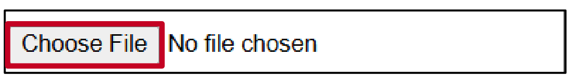
4. Click the **Attach** button to add attachments such as specification documents or images.



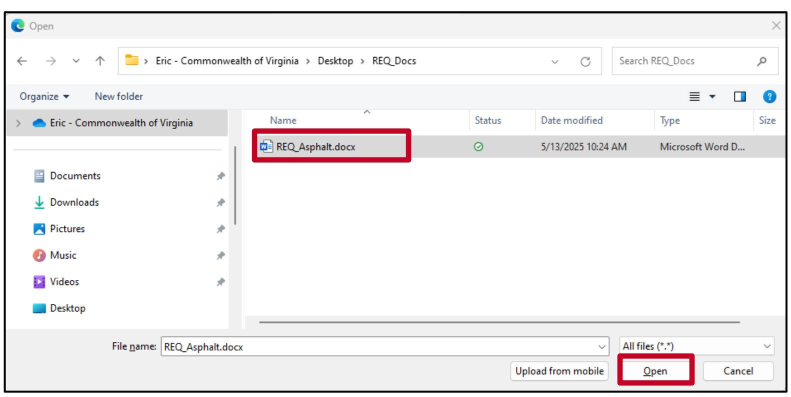
The **File Attachment** page displays in a pop-up window.



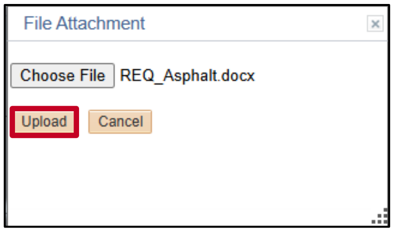
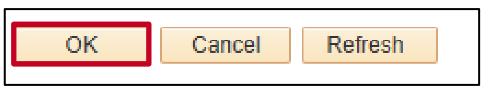
5. Click the **Choose File** button.



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. 
The **Associated Document** section refreshes and displays the name of the attachment. 	
8.	Click the **OK** button to save the changes and close the **Line Comments** page. 

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