

### About Requisitions:

A requisition is generally the first step in requesting the procurement of goods and/or services. A requisition is required for all inventory items (see the **Inventory Issuances and Restock** simulation on the Cardinal website for specific details). For non-inventory items and services, the requisition is used to assign Buyers, 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 or contract.

This job aid provides a step-by-step example for a simple requisition entry. It does not show all features and functions available in Cardinal.

[Requisition From Contract](#)

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[Requisition \(Ad-Hoc\)](#)

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### CREATING A NEW REQUISITION:

- 1 Navigate to the Requisitions page using the following path:  
**Main Menu > Purchasing > Requisitions > Add/Update Requisitions**
- 2 Select the **Add a New Value** tab. Business Unit = **50100**; Requisition ID = **NEXT**. Do not assign a number; Cardinal assigns all requisition numbers in sequential order.
- 3 Click **Add**.

### Requisition from Contract

- 1 Default information (**Name** and **Ship To** values) will automatically populate, per the Requestor's setup, but can be changed as necessary.
- 2 Click on **Vendor Information** tab.

Vendor ID	Short Vendor Name	Vendor Name 1	Ven
000000010	LL BEAN INC	LL Bean Inc	(b)la
0000033093	LL CARTER -002	LL Carter & Son Inc	(b)la
0000071757	LL DISTRIB-001	LL DISTRIBUTING INC	(b)la
0000018909	LL&G SERVI-001	LL&G Services Inc	(b)la
0000020442	LLANDCO IN-001	LLandco Inc	(b)la

- 3 Search for **Vendor** related to the contract.
- 4 Click on the selected vendor hyperlink.

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

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### 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: MIKE.HALL    Hall, Mike (VDOT)    [Requisition Defaults](#)    Card Number:

\*Requisition Date: 03/27/2013    [Requester Info](#)    [Add Comments](#)    Expiration Date:

Origin: ONL    Online Input    [Requisition Activities](#)     Use Procurement Card

\*Currency Code: USD    Dollar

**Amount Summary**

Total Amount: 0.00 USD

**Add Items From**

[Purchasing Kit](#)    [Catalog](#)  
[Item Search](#)    [Requester Items](#)

**Line**

[Details](#) | [Ship To/Due Date](#) | [Status](#) | [Vendor Information](#) | [Item Information](#) | [Attributes](#) | [Contract](#) | [Sourcing Controls](#)

Line	Item	Description	Vendor	Vendor Name	Location
1			0000033093	LL Carter & Son Inc.	MAIN

[View Approvals](#)    \*Go to:

- Vendor information auto-populates, per vendor selected.

[New Window](#)

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### 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: MIKE.HALL    Hall, Mike (VDOT)    [Requisition Defaults](#)    Card Number:

\*Requisition Date: 03/27/2013    [Requester Info](#)    [Add Comments](#)    Expiration Date:

Origin: ONL    Online Input    [Requisition Activities](#)     Use Procurement Card

\*Currency Code: USD    Dollar

**Amount Summary**

Total Amount: 0.00 USD

**Add Items From**

[Purchasing Kit](#)    [Catalog](#)  
[Item Search](#)    [Requester Items](#)

**Line**

[Details](#) | [Ship To/Due Date](#) | [Status](#) | [Vendor Information](#) | [Item Information](#) | [Attributes](#) | **Contract** | [Sourcing Controls](#) | [WebIMS](#)

Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available
1							<input checked="" type="checkbox"/>

[View Approvals](#)    \*Go to:

- Click **Contract** tab.
- Click Contract Look up icon.

Contract Search

Search Criteria

SetID: STATE Vendor SetID: STATE  
 Contract ID: [ ] Vendor ID: 0000033093 LL Carter & Son Inc  
 Contract Process Option: [ ] Item SetID: STATE  
 Description: [ ] Item ID: [ ]  
 Master Contract ID: [ ] Item Description: [ ]  
 Contract Reference Type: [ ] Category: [ ]  
 Requisition Date: 06/13/2012 Corporate Contract: [ ]

**Search** Clear

Contract Details

8 Click the **Search** button.

Contract Search

Search Criteria

SetID: STATE Vendor SetID: STATE  
 Contract ID: [ ] Vendor ID: 0000033093 LL Carter & Son Inc  
 Contract Process Option: [ ] Item SetID: STATE  
 Description: [ ] Item ID: [ ]  
 Master Contract ID: [ ] Item Description: [ ]  
 Contract Reference Type: [ ] Category: [ ]  
 Requisition Date: 06/13/2012 Corporate Contract: [ ]

Search Clear

Contract Details

Item Detail **Contract Reference** Contract Detail

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	22.45000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	21.81000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	21.49000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	11.99000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	22.45000
<input type="checkbox"/>	00000000000000000000000040263	1	Line Item	7503532	7503532250	STONE NO. 78, STONE	20.42000
<input type="checkbox"/>	00000000000000000000000040263	1	Line Item	7503532	7503532045	STONE NO. 8, STONE	20.57000
<input type="checkbox"/>	00000000000000000000000040263	1	Line Item	7503532	7503532030	STONE NO. 3, STONE	16.17000
<input type="checkbox"/>	00000000000000000000000040263	1	Line Item	7503565	7503565400	STONE, MISCELLANEOUS GABION	23.64000
						AGGREGATE BASE, STONE	

9 All Contracts with Lines (related to the selected vendor) display as shown.

10 Click the **Contract Reference** tab.

## Requisitions

**Contract Search**

Search Criteria

SetID: STATE Vendor SetID: STATE  
 Contract ID: Vendor ID: 0000033093 LL Carter & Son Inc  
 Contract Process Option: Item SetID: STATE  
 Description: Item ID:  
 Master Contract ID: Item Description:  
 Contract Reference Type: Category:  
 Requisition Date: 06/14/2012 Corporate Contract:

Search Clear

Contract Details

Select	Contract ID	Contract Version	Category Line Number	Item Line Number	Unit of Measure	Currency	Remaining Quantity	Remaining Amount
<input checked="" type="checkbox"/>	00000000000000000000000040405	1		1	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040405	1		2	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040405	1		3	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040405	1		4	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040405	1		5	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040263	1		1	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040263	1		2	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040263	1		3	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040263	1		4	TN	USD	0.0000	0.000
<input type="checkbox"/>	00000000000000000000000040263	1		5	TN	USD	0.0000	0.000

OK Cancel Refresh

- 11 Contract Line display.
- 12 Check a selected line item.
- 13 Click OK.

**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: MIKE.HALL Hall, Mike (VDOT) Requisition Defaults Card Number:  
 \*Requisition Date: 03/27/2013 Requisition Info Add Comments Expiration Date:  
 Origin: ONL Online Input Requisition Activities  Use Procurement Card  
 \*Currency Code: USD Dollar Amount Summary

Total Amount: 0.00 USD

Add Items From

Purchasing Kit Catalog  
 Item Search Requisition Items

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

Line	Item	Description	Contract ID	Contract Version	Contract Line Number	Category Line Number	Use Contract if Available
1	7503548485	STONE, CRUSHED	000000000000000000000040405	1	5		<input checked="" type="checkbox"/>

View Approvals \*Go to: ...More...

Save Notify Refresh

- 14 The Contract Item selected auto-populates the requisition line.
- 15 Click the Details tab.

**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: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:   
 \*Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:   
 Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card  
 \*Currency Code: USD Dollar

**Amount Summary**

Total Amount: 538.80 USD

Add Items From: [Purchasing Kit](#) [Catalog](#) [Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1	7503548485	STONE, CRUSHED	24.0000	LTN	7503548	22.45000	538.80	Open			

[View Approvals](#) \*Go to:

16 Enter the **Quantity** requested.

17 Click on **Schedule** icon.

**CARDINAL**

Home | Worklist | Add to Favorites | Sign out

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

**Maintain Requisitions**

**Schedule**

Business Unit: 50100 Requisition Date: 06/18/2012  
 Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	24.0000	22.45000	538.80			Active

[Add Ship To Comments](#)

18 **Ship To** location is shown per user default and can be edited as necessary.

19 Click on the **Distribution** icon.

**Maintain Requisitions**

**Distribution**

Requisition ID: NEXT      Item: 7503548485      [STONE\\_CRUSHED\\_GRADE\\_26](#)  
 Line: 1      Status: Active  
 Schedule: 1

Ship To: CNTRL OF2      Quantity: 24.0000 LTN  
 \*Distribute By: Quantity      Open Quantity: 24.0000  
 \*Invalidate by: Amount      Merchandise Amt: 538.80 USD  
 SpeedChart: [Multi-SpeedCharts](#)

Distrib	Percent	Quantity	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency
1 Open	100.0000	24.0000	538.80	50100		5012550	04100	699001	10024	11120010				

OK    Cancel    Refresh

- 20 Enter valid chart of accounts values (An example is shown above). To auto-populate the **Cost Center**, **Fund** and **Program**, you may use the **SpeedChart** lookup. The **Multi-SpeedCharts** hyperlink is used to split distributions.
- 21 Click **OK**.

**Maintain Requisitions**

**Schedule**

Business Unit: 50100      Requisition Date: 06/18/2012  
 Requisition ID: NEXT      Status: Open  
[Return to Main Page](#)

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	24.0000	22.45000	538.80			Active

Save    Notify    Refresh    Add    Update/Display

- 22 Click on **Return to Main Page** hyperlink.

**Maintain Requisitions** New Window Help

**Requisition**

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

Requisition ID: 0002035030

Requisition Name: 0002035030  Hold From Further Processing

**Header**

\*Requester: MIKE HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

\*Requisition Date: 03/27/2013 [Add Comments](#) Expiration Date:

Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card

\*Currency Code: USD Dollar [Document Status](#)

**Amount Summary**

Total Amount: 538.80 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Select Lines To Display

Line:  To:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503548485	STONE, CRUSHED	24.0000	LTN	7503548	22.45000	538.80	Open

[View Approvals](#) \*Go to:

- 23 Click **Save**.
- 24 Cardinal assigns a **Requisition ID** number.
- 25 Click on the Approval **Status** checkbox.

**Maintain Requisitions** New Window Help

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**Requisition**

Business Unit: 50100 \*WebIMS Req Type: Regular **Status: Pending** ✖

Requisition ID: 0002035030

Requisition Name: 0002035030  Hold From Further Processing

**Header**

\*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

\*Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:

Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card

\*Currency Code: USD Dollar [Document Status](#)

**Amount Summary**

Total Amount: 538.80 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#) [Item Search](#) [Requester Items](#)

Select Lines To Display

Line:  To:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503548485	STONE, CRUSHED	24.0000	LTN	7503548	22.45000	538.80	Pending

[View Approvals](#) \*Go to:

- 26 Requisition **Status** changes to Pending and the Supervisor is notified via email and Worklist.
- 27 Requisition is complete.
- 28 Click on **View Approval** hyperlink to view step/stage of approval status.

**CARDINAL** Home Worklist Add to Favorites Sign out

Favorites Main Menu > Purchasing > Requisitions > Add/Update Requisitions New Window Help Customize Page http

**View Approvals**

Business Unit: 50100 Number of Lines: 1

Requisition ID: 0002020261 Total Amount: 538.80 USD

Requisition Name: 0002020261

Requested For: Hall, Mike (VDOT)

Status: Pending

Budget Status: Valid

**Req for Supervisor Action**

Requisition 0002020261: Pending

Req - Requester's Supervisor

Pending

McCracken, Stacy (VDOT)

Requester's Supervisor

**Req for Procurement Mgr Action**

Requisition 0002020261: Awaiting Further Approvals

Req - Procurement Manager

Not Routed

Multiple Approvers

Approval Assignment to Buyer

Apply Approval Changes

## Requisitions

29 Supervisor views and selects item from their Worklist.

30 Supervisor may insert comment and act (approve/deny) the Requisition

31 Once approved, the Requisition is forwarded to the Procurement Office for assignment.

**Req for Supervisor Action**

Requisition 0002020261: Approved [View/Hide Comments](#) [Start New Path](#)

Req - Requester's Supervisor

Approved  
✓ McCracken, Stacy (VDOT)  
 Requester's Supervisor  
 06/18/12 - 11:44 AM

Comments

McCracken, Stacy (VDOT) at 06/18/12 - 11:44 AM  
Approved

---

**Req for Procurement Mgr Action**

Requisition 0002020261: Pending [View/Hide Comments](#) [Start New Path](#)

Req - Procurement Manager

Pending  
🕒 [Multiple Approvers](#)  
 Approval Assignment to Buyer

Comments

Approver #1	
Name:	Hall, Mike (VDOT)
Empl ID:	00222997300
Department:	10003
Supervisor ID:	
Telephone:	
Reports To Position Number:	00014
Email ID:	xxmike.hall@vdot.virginia.gov
Approver #2	
Name:	Hudgins, Caroline S. (VDOT)
Empl ID:	00038895600
Department:	10003
Supervisor ID:	
Telephone:	
Reports To Position Number:	22892
Email ID:	xxcaroline.hudgins@vdot.virginia.gov

**32** You may view the list of Approvers, by clicking on the Multiple Approver hyperlink.

### Requisition From Requisition

**Maintain Requisitions**

**Requisition**

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

Requisition ID: NEXT **Copy From**  Hold From Further Processing

**Header**

\*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

\*Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:

Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card

\*Currency Code: USD Dollar

**Amount Summary**

Total Amount: 0.00 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

[View Approvals](#) \*Go to:

1 Repeat (page1) steps 1-3.

Click on **Copy From** hyperlink.

**Maintain Requisitions**

**Copy Requisition**

**Header**

Business Unit: 50100

Requisition ID: 0002020261

Requisition Name:

Req Status:  Origin:

Requester:

Requester Name:

Requisition Date:  To:

Vendor SetID: STATE [Vendor Lookup](#)

Vendor ID:  [Vendor Details](#)

Vendor Name:

Item SetID: STATE

Item ID:

Item Description:

Department:   Direct Ship

**Search**

Req ID	Requisition Name	Status	Origin	Requester

2 Enter the **Requisition ID**.

3 Click **Search** button.

**Maintain Requisitions**

**Copy Requisition**

Business Unit: 50100  
 Requisition ID: 0002020261  
 Requisition Name:   
 Req Status:  Origin:   
 Requester:   
 Requester Name:   
 Requisition Date:  To:   
 Vendor SetID: STATE Vendor Lookup  
 Vendor ID:  Vendor Details  
 Item SetID: STATE  
 Item Description:   Direct Ship  
 Department:

Set	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	0002020261	0002020261	Pending Approval	ONL	MIKE HALL

OK Cancel Refresh

4 Check/select the requisition.

5 Click **OK**.

**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: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:   
 \*Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:   
 Origin: ONL [Requisition Activities](#)  Use Procurement Card  
 \*Currency Code: USD Dollar

**Amount Summary**

Total Amount: 538.80 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#)  
[Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503548485	STONE, CRUSHED	24.0000	LTN	7503548	22.45000	538.80	Open

[View Approvals](#) \*Go to:

Save Notify Refresh Add Update/Display

6 The Requisition is displayed with all copied values, including accounting distribution.

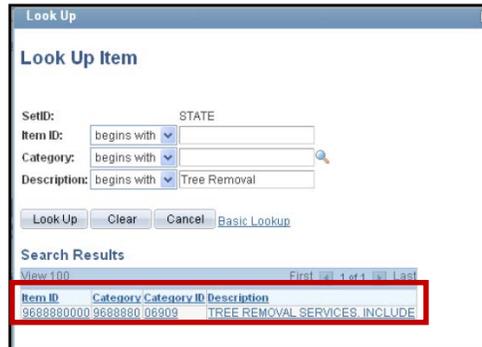
7 Repeat (pages 6-9) steps 16-28 as applicable.

8 Requisition is complete and pending approval.

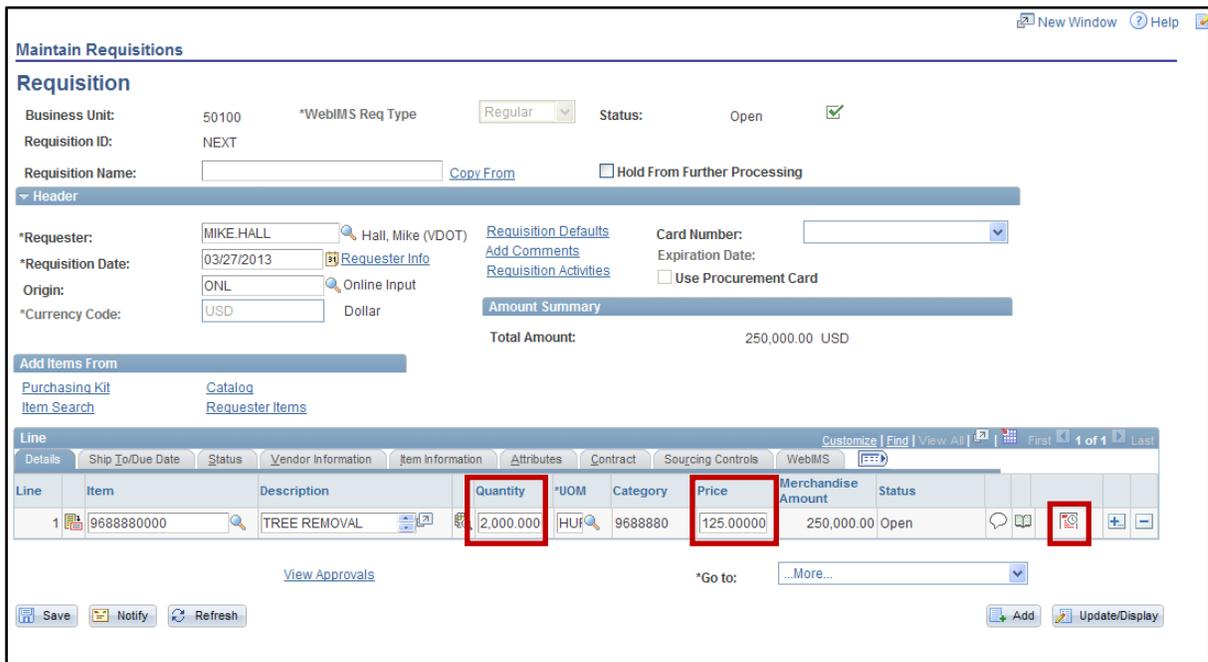
### Requisition (Ad-Hoc)

- 9 Repeat (page1) steps 1-3.
- 10 Click on **Item ID** or **Category** for a list of valid values. You can select either **Item ID** or **Category**, but not both.

- 11 Search and select **Item ID** or **Category** by **Item ID** or **Description**.  
 Item selection (10 digit NIGP #) defaults both **Description** and **UOM** and cannot be changed.  
 Category selection (5 or 7 digit NIGP #) allows both **Description** and **UOM** to be edited.



- 12 For example, item selected by **Description** (tree removal).
- 13 Click on **Item ID** hyperlink.



- 14 Item auto-populates based on your selection.
- 15 Enter **Quantity** and estimated **Price** per **UOM**.
- 16 Click on **Schedule** icon.

**Maintain Requisitions**

**Schedule**

Business Unit: 50100      Requisition Date: 06/21/2012  
 Requisition ID: NEXT      Status: Open

Return to Main Page

Line	Item	Description	Quantity	Hour	Merchandise Amt
1	968880000	TREE REMOVAL SERVICES, INCLUDE	2,000.0000		250,000.00 USD

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	2,000.0000	125.00000	250,000.00		Hall, Mike (VDO1)	Active

Buttons: Save, Notify, Refresh, Add, Update/Display

17 Click on Distribution icon

**Maintain Requisitions**

**Distribution**

Requisition ID: NEXT      Item: 968880000      TREE REMOVAL SERVICES, INCLUDE  
 Line: 1      Status: Active  
 Schedule: 1

Ship To: CNTRL OF2      CNTRL OF2      Quantity: 2,000.0000 HUR  
 \*Distribute By: Quantity      Open Quantity: 2,000.0000  
 \*Liquidate by: Amount      Merchandise Amt: 250,000.00 USD  
 SpeedChart: Multi-SpeedCharts

Distrib	Percent	Quantity	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency
1	Open	100.0000	2,000.0000	250,000.00	50100	5012550	04100	699001	12052	11120010				

Buttons: OK, Cancel, Refresh

18 Enter accounting distribution.

19 Click OK.

**Maintain Requisitions**

**Schedule**

Business Unit: 50100      Requisition Date: 06/21/2012  
 Requisition ID: NEXT      Status: Open

Return to Main Page

Line	Item	Description	Quantity	Hour	Merchandise Amt
1	968880000	TREE REMOVAL SERVICES, INCLUDE	2,000.0000		250,000.00 USD

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	2,000.0000	125.00000	250,000.00		Hall, Mike (VDO1)	Active

Buttons: Save, Notify, Refresh, Add, Update/Display

20 Click on Return to Main Page hyperlink.

**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: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

\*Requisition Date: 03/27/2013 [Requester Info](#) **Add Comments** Expiration Date:

Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card

\*Currency Code: USD Dollar

**Amount Summary**

Total Amount: 250,000.00 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	9688880000	TREE REMOVAL	2,000.000	HUJ	9688880	125.00000	250,000.00	Open

[View Approvals](#) \*Go to:

- 21 Click on **Add Comment** hyperlink to enter a Header Comment/Attachment.
- 22 Click on the line **Comment** icon to enter Line Comment/Attachment.

**Line Comments**

Business Unit: 50100 Requisition Date: 06/21/2012

Requisition ID: NEXT Status: Open Line: 1

\*Sort Method:  \*Sort Sequence:

**Comments**

[Use Standard Comments](#) [Use Item Specifications](#) Comment Status: Active

The Requisition is for a Tree Removal Service contract necessary for the XXXXXX Residency. All terms and conditions from the prior contract remain. Please contact Mr. John Doe for any additional information.

Send to Vendor  Show at Receipt

Show at Voucher

**Associated Document**

Attachment: Desktop\_image1.JPG     Email

From -> REQ 50100-NEXT

- 23 Enter comment(s) and attachments if appropriate.
- 24 Click **OK**.

## Requisitions

**Maintain Requisitions** New Window Help

**Requisition**

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

Requisition ID: 0002035031

Requisition Name: 0002035031  Hold From Further Processing

**Header**

\*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

\*Requisition Date: 03/27/2013 [Requester Info](#) [Edit Comments](#) Expiration Date:

Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card

\*Currency Code: USD Dollar [Document Status](#)

**Amount Summary**

Total Amount: 250,000.00 USD

**Add Items From** [Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Select Lines To Display

Line:  To:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	9688880000	TREE REMOVAL	2,000.000	HUF	9688880	125.00000	250,000.00	Open

[View Approvals](#) \*Go to:

- 25 Click **Save**.
- 26 Cardinal assigns a **Requisition ID** number.
- 27 Click on the Approval **Status** checkbox.

**Maintain Requisitions** New Window Help

**Requisition**

Business Unit: 50100 \*WebIMS Req Type: Regular Status: Pending

Requisition ID: 0002035031

Requisition Name: 0002035031  Hold From Further Processing

**Header**

\*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

\*Requisition Date: 03/27/2013 [Requester Info](#) [Edit Comments](#) Expiration Date:

Origin: ONL Online Input [Requisition Activities](#)  Use Procurement Card

\*Currency Code: USD Dollar [Document Status](#)

**Amount Summary**

Total Amount: 250,000.00 USD

**Add Items From** [Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Select Lines To Display

Line:  To:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	9688880000	TREE REMOVAL	2,000.000	HUF	9688880	125.00000	250,000.00	Pending

[View Approvals](#) \*Go to:

- 28 Requisition **Status** changes to **Pending** and the Supervisor is notified via email and Worklist.
- 29 Requisition is complete.
- 30 View pages 9-11 for approval workflow and action.

### HELPFUL HINTS

#### Ship To:



Line	Item	Description	Due Date	Ship To	Price
1	9688880000	TREE REMOVAL		CNTRL OF	125.00000

- **Ship To/Due Date** tab allows you to select desired date and location.

#### Vendor:



Line	Item	Description	Vendor	Vendor Name	Location
1	9688880000	TREE REMOVAL	0000029580	ALL PRO SERVICES	MAIN

- **Vendor Information** tab displays vendors related to the selected **Item**. You can search for and select any vendor that you wish to display.

#### Item Information:



Line	Item	Description	UPN ID	RFQ Required	Device Tracking	Vendor Item ID	Vendor's Catalog	Manufacturer ID	Manufacturer's Item ID
1	9688880000	TREE REMOVAL		<input type="checkbox"/>	<input type="checkbox"/>				

- **Item Information** tab allows you to enter specific Vendor Item information, e.g., Grainger Catalog, Version 13, pg 6. Item # XXXXXX



Description	Vendor Item ID	Vendor's Catalog	Manufacturer ID	Manufacturer's Item ID	UPN ID
CUPS, PAPER, FLAT BOTTOM, NO HANDLE, FOR COLD LIQUIDS, ROLLE 7 OZ DRINKING CUPS				920253	

- For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.



Line	Item	Description	UPN ID	RFQ Required	Device Tracking	Vendor Item ID	Vendor's Catalog	Manufacturer ID	Manufacturer's Item ID
1	9688880000	TREE REMOVAL		<input type="checkbox"/>	<input type="checkbox"/>			RICHMOND	Sandston Residency

- To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.

### Attributes:

Line	Item	Description	Buyer	Name	Physical Nature	Where Service Performed	Zero Price Indicator	Amount Only	Inspection Required	Inspect ID
1	968880000	TREE REMOVAL	MIKE HALL	Hall, Mike (VDOT)	Services	Ship To Locati	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

- The **Attributes** tab allows you to select **Goods** or **Services** and to receive by **Quantity** or **Amount Only**.

### WebIMS Type Requisitions:

**Maintain Requisitions**

**Requisition**

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

Requisition ID: NEXT

Requisition Name:

Hold From Further Processing

\*Requester:

\*Requisition Date: 01/30/2014 [Requester Info](#)

Origin: ONL [Online Input](#)

\*Currency Code: USD Dollar

Total Amount: 0.00 USD

- Select the **WebIMS Req Type** first and foremost.

**Maintain Requisitions**

**Distribution**

Requisition ID: NEXT Item: 7507766150 [SAND SAND, GRADE B NATURAL](#)

Line: 1 Status: Active

Schedule: 1

Ship To: CULPPR DIS CULPPR DIS Quantity: 100.0000 LTN

\*Distribute By: Quantity Open Quantity: 100.0000

Merchandise Amt: 1,549.00 USD

SpeedChart:

Distrib	Percent	Location	IN Unit	Statistics Code	Open Quantity	GL Base Amount	
1 Open	100.0000	MADSN AH02			100.0000	1,549.00	Dollar

OK Cancel Refresh

- Select the **Details** tab on the line Distribution to be sure to enter the specific stock location matching the line Schedule location.



### Workflow:

- See Steps 32-35.
- An email is sent to the Supervisor when the Requisition status is changed to pending.
- Once approved, Cardinal forwards the Requisition to the Procurement Manager for assignment to a Buyer.
- An email is sent to the Requestor when the Requisition is approved/denied/assigned.

### Related Documents:

- Click on the **Document Status** hyperlink to view all related documents; e.g., Purchase Order, Strategic Sourcing Event, Receivers, Vouchers & Payments.



### Reports:

#### Requisition Print

Navigate to Purchasing > Requisitions > Reports > Print Requisition

**Requisition**

**Ship To:** VDOT Central Office  
1401 E Broad St  
Richmond VA 23219

<b>Business Unit:</b> 50100		
Req ID:	Date	Page
0002022608	06/21/2012	1
Requisition Name:		
Locksmith Work HGWY Bld		
<b>Requester</b>		<b>Currency</b>
Godfrey, Jeffrey A. (VDOT)		USD
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1	9104801000	LOCKSMITH SERVICES LOCKSMITH SERVICES		200.0000	HUR	1.00	200.00	06/22/2012

Buyer: Godfrey, Jeffrey A. (VDOT)  
Vendor: 0000033917 Dominion Lock & Security  
Attn: Godfrey, Jeffrey A. (VDOT)

This is a not to exceed telephone estimate to perform the following locksmith services on site at our 1221 E. Broad St location on 6/22/12.  
 1) Change code on cipher lock  
 2) Rekey cipher lockset to single key not on building master  
 3) Provide new padlock (Master Lock #7 or equal) with four keys  
 4) Duplicate up to 10 keys as provided during site visit

Please call Jeffrey Godfrey (840-7248) to confirm time of your site visit first visit in the morning.

Line Total: 200.00

Total Requisition Amount: 200.00



# Procurement Job Aid

## Requisitions

### PO/Requisition Xref

Navigate to Purchasing > Requisitions > Reports > PO/Requisition Xref

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ORACLE		Report ID: POY1100	PeopleSoft Purchasing		Page No. 1
		User ID: PPS_MIKE.HALL	REQUISITION TO PO XREF REPORT		Run Date 6/21/2012
		Run Control: PRINT_PO			Run Time 11:59:33AM

Req Dates Included: 6/15/2012 Thru: 6/20/2012  
Business Unit: 50100

Requisition				Purchase Order												
ID	Lin/Sch/Dst	Date	Item ID	Description	Quantity	UOM	PO ID	Contract ID	Rel	Ship Date	Lin/Sch/Dst	Quantity	CUR	Price		
0002022008	1	1	6/15/2012	7503548485	GRADE 28	2,000.00	LTN	0001027071	0000000000000032415	2	6/15/2012	1	1	2,000.00	USD	18.43
Requisition Name: 0002022008																
0002022031	1	1	6/15/2012	5508126146	CABINETS, TRAFFIC SIGNAL CONTROLLER	1.00	EA	0001027235			6/19/2012	1	1	1.00	USD	5,300.00
Requisition Name: 0002022031																
Attention To: Fecteau, Karen (VDOT)																
0002022032	1	1	6/15/2012	4259435000	COMPUTER WORKSTATION FURNITURE	1.00	EA	0001027909			8/15/2012	1	1	1.00	USD	62,842.48
Requisition Name: 0002022032 Case Goods NOVA DIS																
Attention To: Salisbury, Dave M. (VDOT)																
0002022032	2	1	6/15/2012	9314501000	FURNITURE INSTALLATION AND RECONFIGURATION SERVICES (INCL. S	1.00	EA	0001027909			8/15/2012	2	1	1.00	USD	4,399.00
Requisition Name: 0002022032 Case Goods NOVA DIS																
Attention To: Salisbury, Dave M. (VDOT)																
0002022044	1	1	6/15/2012	7503548485	STONE, CRUSHED GRADE 28	1,000.00	LTN	0001027213	000000000000000040574	1	6/19/2012	1	1	1,000.00	USD	16.98
Requisition Name: 0002022044																
Attention To: Ferguson, Betty C (VDOT)																
0002022047	1	1	6/15/2012	2850949842	ENCLOSURE PARTS AND ACCESSORIES, ELECTRICAL EQUIPMENTS UNDERGROUND	1.00	EA	0001027545			6/19/2012	1	1	1.00	USD	165.00
Requisition Name: 0002022047																
Attention To: Hare, Neale D. (VDOT)																
0002022047	2	1	6/15/2012	2850949840	ENCLOSURE PARTS AND ACCESSORIES, ELECTRICAL EQUIPMENTS UNDERGROUND	1.00	EA	0001027545			6/19/2012	2	1	1.00	USD	161.90
Requisition Name: 0002022047																
Attention To: Hare, Neale D. (VDOT)																
0002022049	1	1	6/15/2012	4504412052	COOLERS, WATER, PORTABLE 1 GALLON WATER CONTAINER W/ID	192.00	EA	0001027544			6/19/2012	1	1	192.00	USD	2.12
Requisition Name: 0002022049																
Attention To: Hare, Neale D. (VDOT)																

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