

Create Requisitions Overview

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 entitled **501 PR347: Inventory Issuances and Restock**, located on the Cardinal website in **Course Materials** under **Learning**.

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.

Please refer to the course entitled **501 PR342: Processing Requisitions**, located on the Cardinal website in **Course Materials** under **Learning**, for more information on creating and maintaining regular requisitions using the Procurement and eProcurement modules.

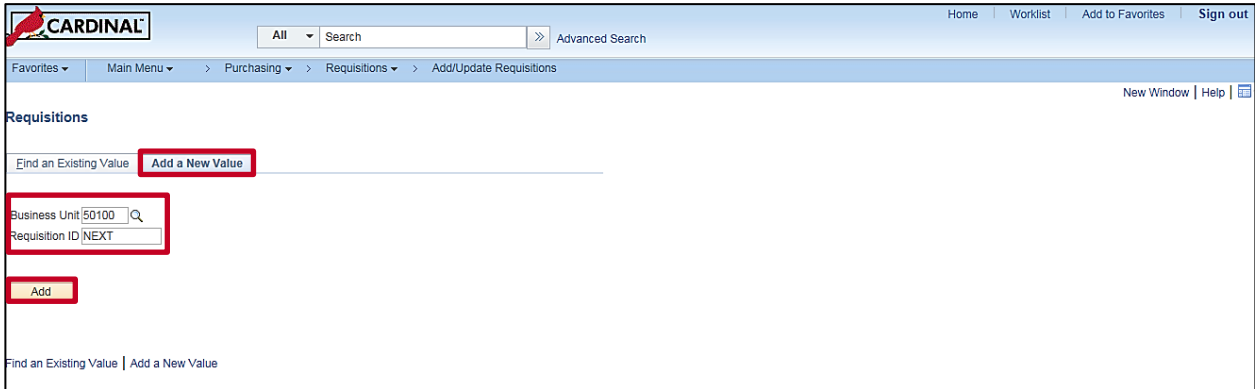
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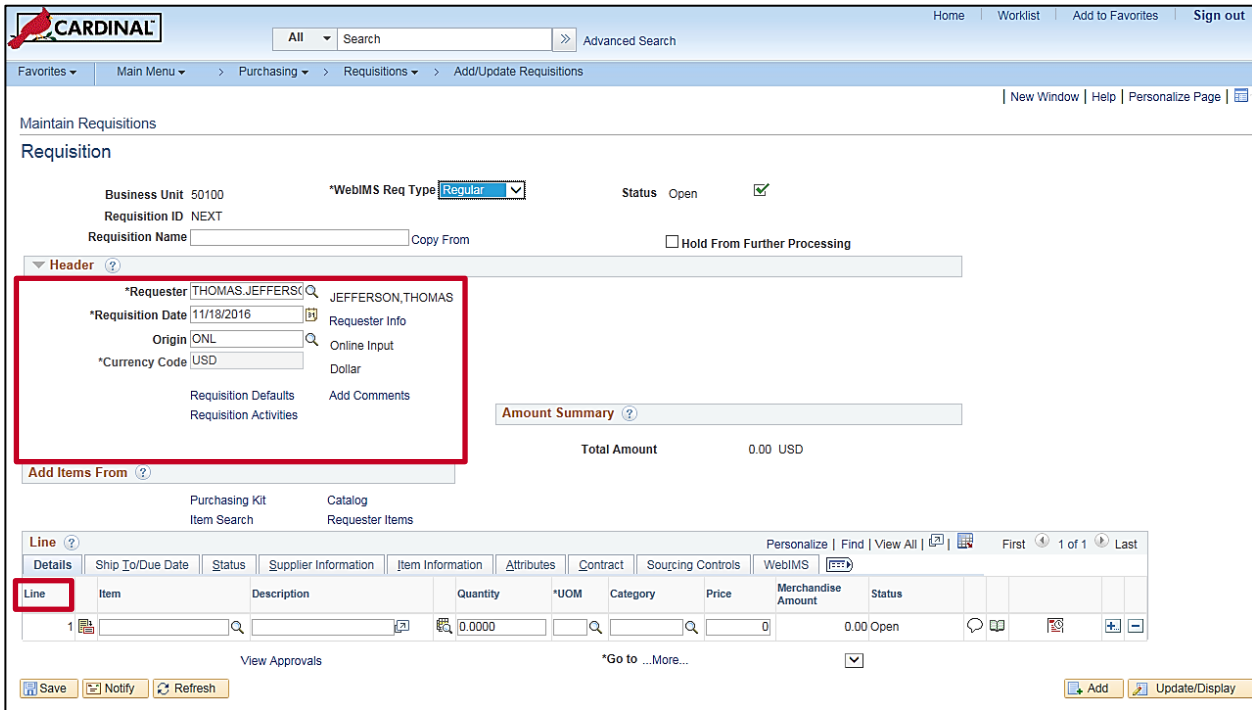
Create a New Requisition (Beginning Steps for All Requisitions)

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:
 - a. **Business Unit: 50100**
 - b. **Requisition ID: NEXT** and should not be changed. Cardinal assigns a **Requisition ID** number when you successfully save the requisition.
3. Click the **Add** button. The **Maintain Requisitions – Requisitions** page displays.



Header

*Requester THOMAS.JEFFERS JEFFERSON,THOMAS
 *Requisition Date 11/18/2016 Requisition Info
 Origin ONL Online Input
 *Currency Code USD Dollar

Requisition Defaults Add Comments
 Requisition Activities

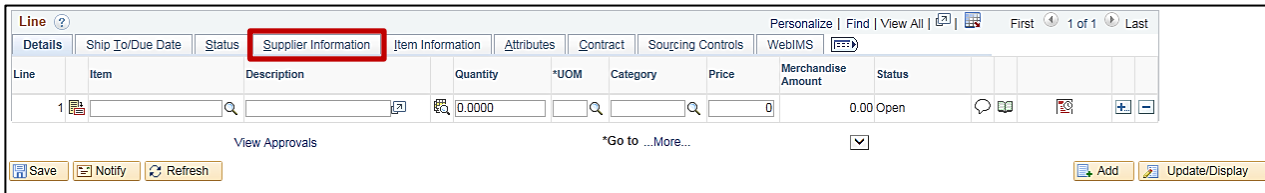
Amount Summary

Total Amount 0.00 USD

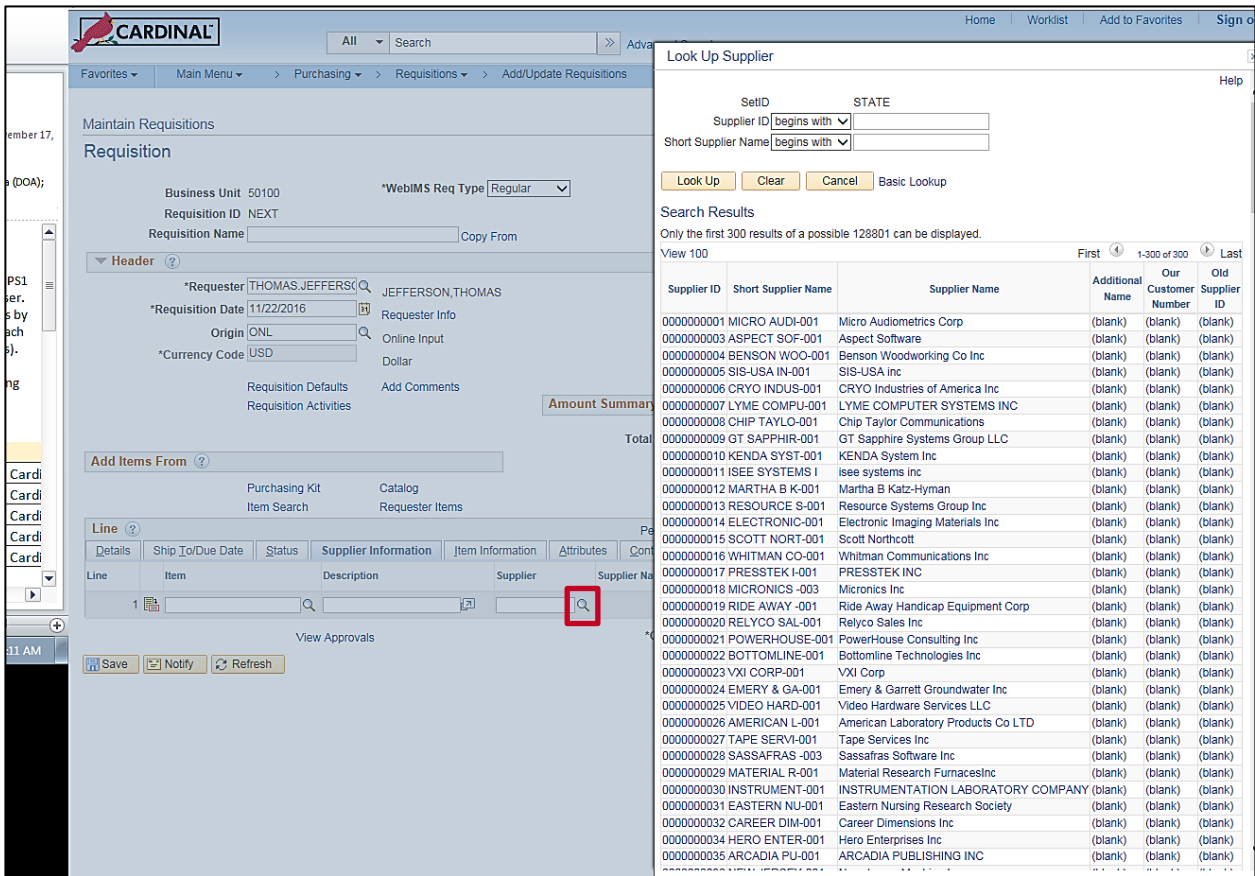
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

4. The **Header** section contains some key data to include **Requester**, **Requisition Date**, and **Origin**.
5. Default information, such as **Requester** and **Ship To** values, automatically populate based on your user setup, but can be changed as necessary. The **Ship To/Due Date** tab allows you to select desired date and modify the **Ship To** location.
6. For more detailed instructions, please refer to the course entitled **501 PR342: Processing Requisitions**, located on the Cardinal website in **Course Materials** under **Learning**.

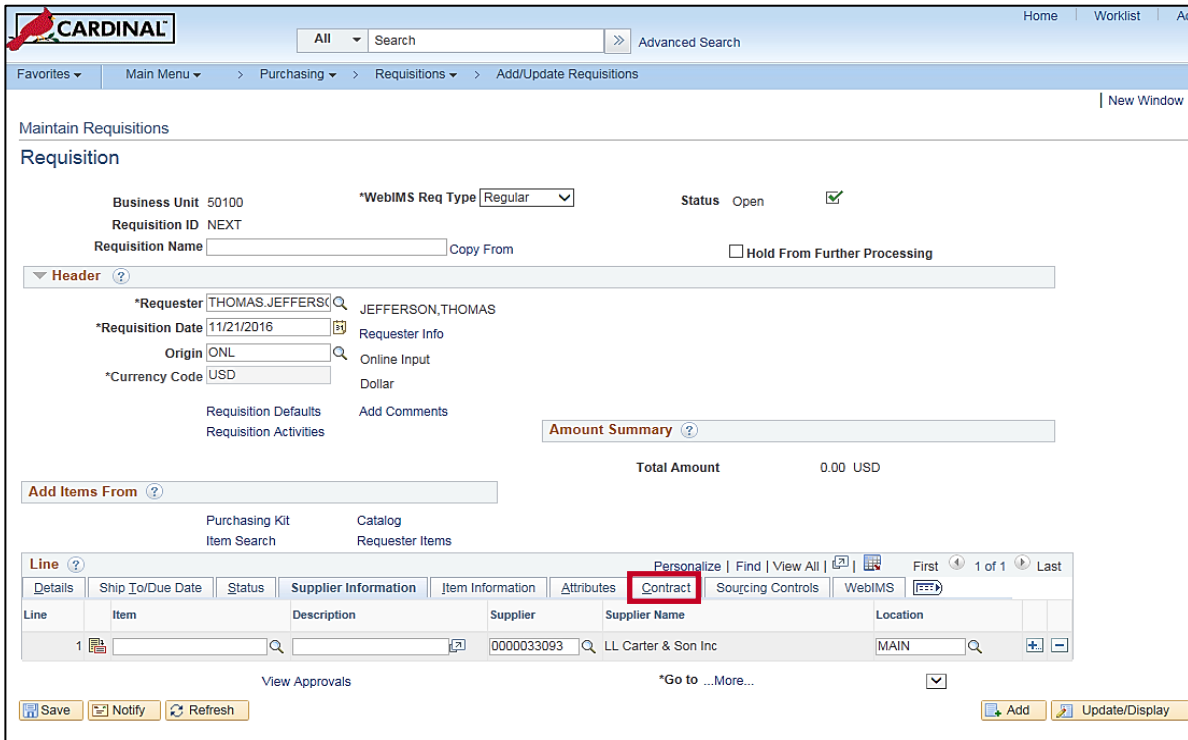
Create a Requisition (1 Item/Line) from a Contract



1. Click the **Supplier Information** tab.



2. Search for the supplier related to the contract. The **Supplier Information** tab displays suppliers related to the selected Item. You can search for and select any supplier that you wish to display by clicking the **Supplier** field lookup icon.
3. Click the selected **Supplier** link. The selected supplier's information will populate.



CARDINAL | All | Search | Advanced Search | Home | Worklist | Ad

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

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 THOMAS.JEFFERS(JEFFERSON,THOMAS
 *Requisition Date 11/21/2016 Requirer Info
 Origin ONL Online Input
 *Currency Code USD Dollar

Requisition Defaults Add Comments
 Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requirer Items

Line

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

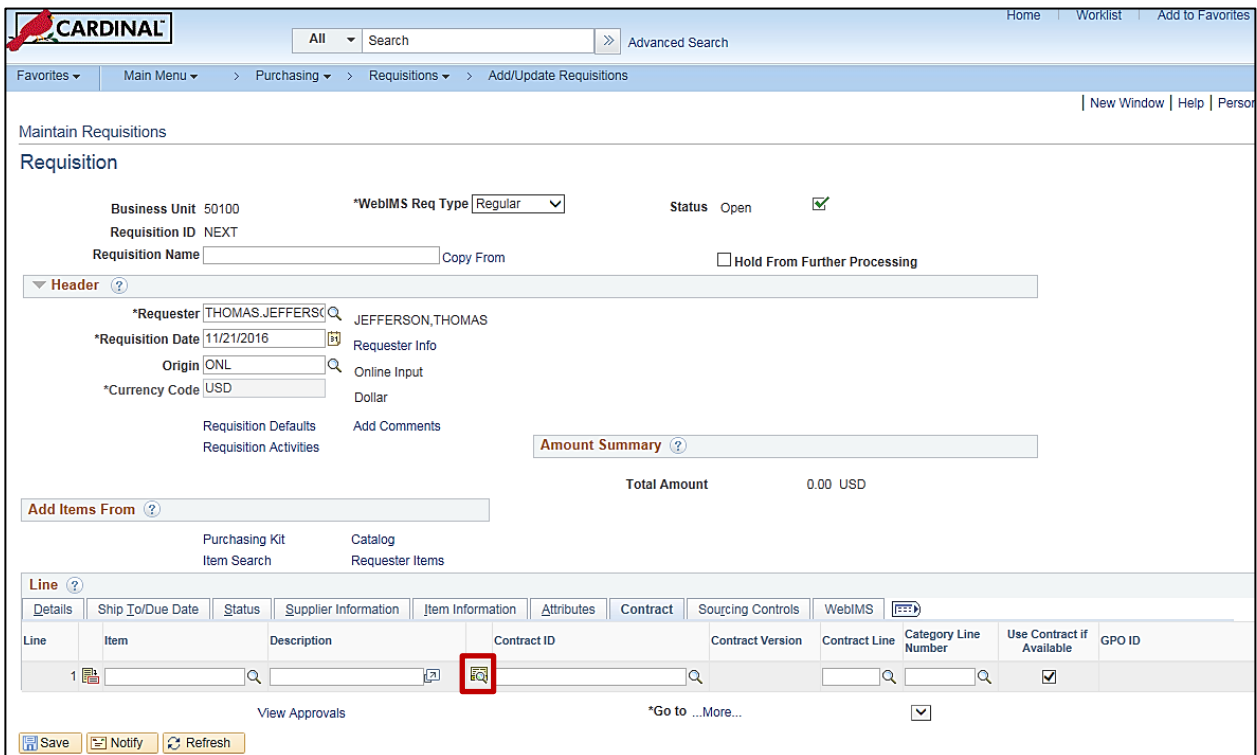
Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | **Contract** | Sourcing Controls | WebIMS

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

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

Save Notify Refresh Add Update/Display

4. Click the **Contract** tab.



CARDINAL | All | Search | Advanced Search | Home | Worklist | Add to Favorites

Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions | New Window | Help | Person

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 THOMAS.JEFFERS(JEFFERSON,THOMAS
 *Requisition Date 11/21/2016 Requirer Info
 Origin ONL Online Input
 *Currency Code USD Dollar

Requisition Defaults Add Comments
 Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requirer Items

Line

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

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

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

Save Notify Refresh

5. Click the **Contract Search** icon.

- Click the **Contract Reference** tab to see the lines for each contract.

Contract Search Help

Search Criteria

SetID STATE	Supplier SetID STATE
Contract ID <input type="text"/>	Supplier ID <input type="text" value="0000033093"/> LL Carter & Son Inc
Contract Style <input type="text"/>	Item SetID STATE
Contract Process Option <input type="text"/>	Item ID <input type="text"/>
Description <input type="text"/>	Item Description <input type="text"/>
Master Contract ID <input type="text"/>	Category <input type="text"/>
Contract Reference Type <input type="text"/>	Corporate Contract <input type="text"/>
Requisition Date 11/21/2016	

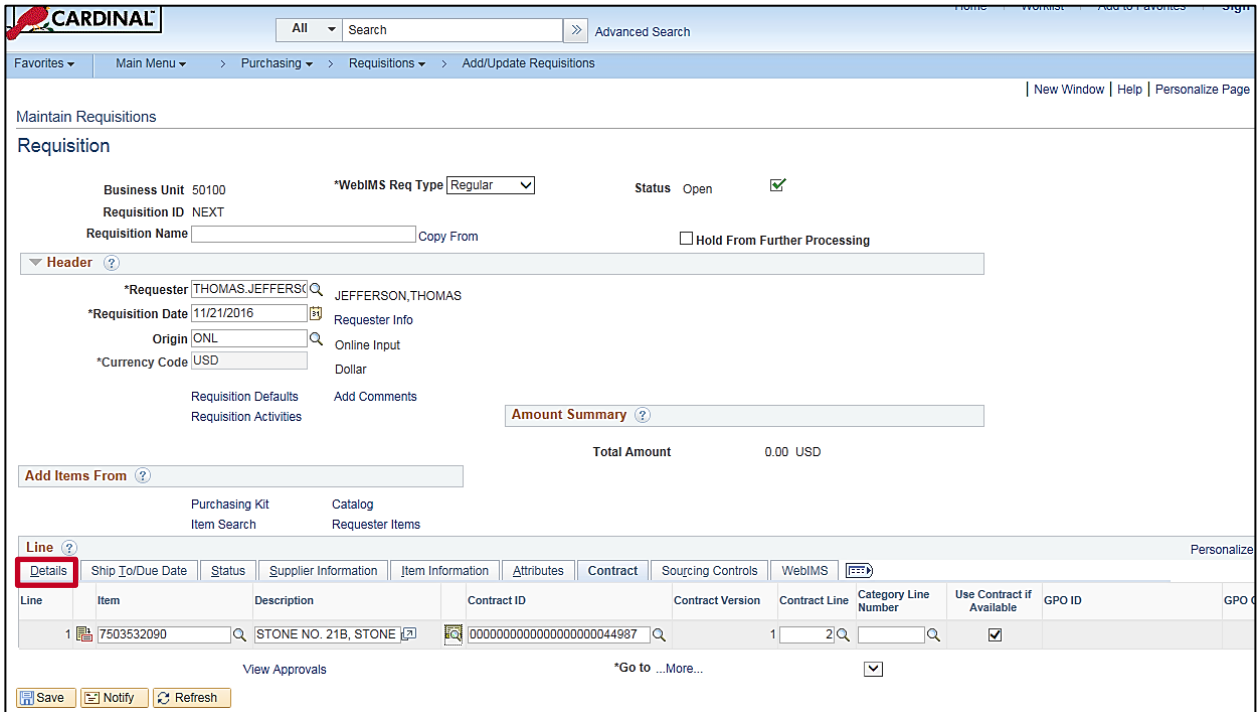
Search
Personalize | Find | View 100 | First 1-10 of 103 Last

Contract Details

Item Detail | **Contract Reference** | Contract Detail
FFF

Select	Contract ID	Contract Version	Category Line Number	Item Line Number	Remaining Quantity	Unit of Measure	Contract Reference Type	Remaining Line Amount	Currency
<input type="checkbox"/>	00000000000000000000000044987	1		1		N/A LTN	Line Item		N/A USD
<input checked="" type="checkbox"/>	00000000000000000000000044987	1		2		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		3		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		4		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		5		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		6		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		7		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		8		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		9		N/A LTN	Line Item		N/A USD
<input type="checkbox"/>	00000000000000000000000044987	1		10		N/A LTN	Line Item		N/A USD

- To use a line on the requisition, click the check-box to the left of the selected line. Only one line may be selected for copying.
- Click the **OK** button.



Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

Header

*Requester THOMAS.JEFFERS JEFFERSON,THOMAS

*Requisition Date 11/21/2016 Requirer Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary

Total Amount 0.00 USD

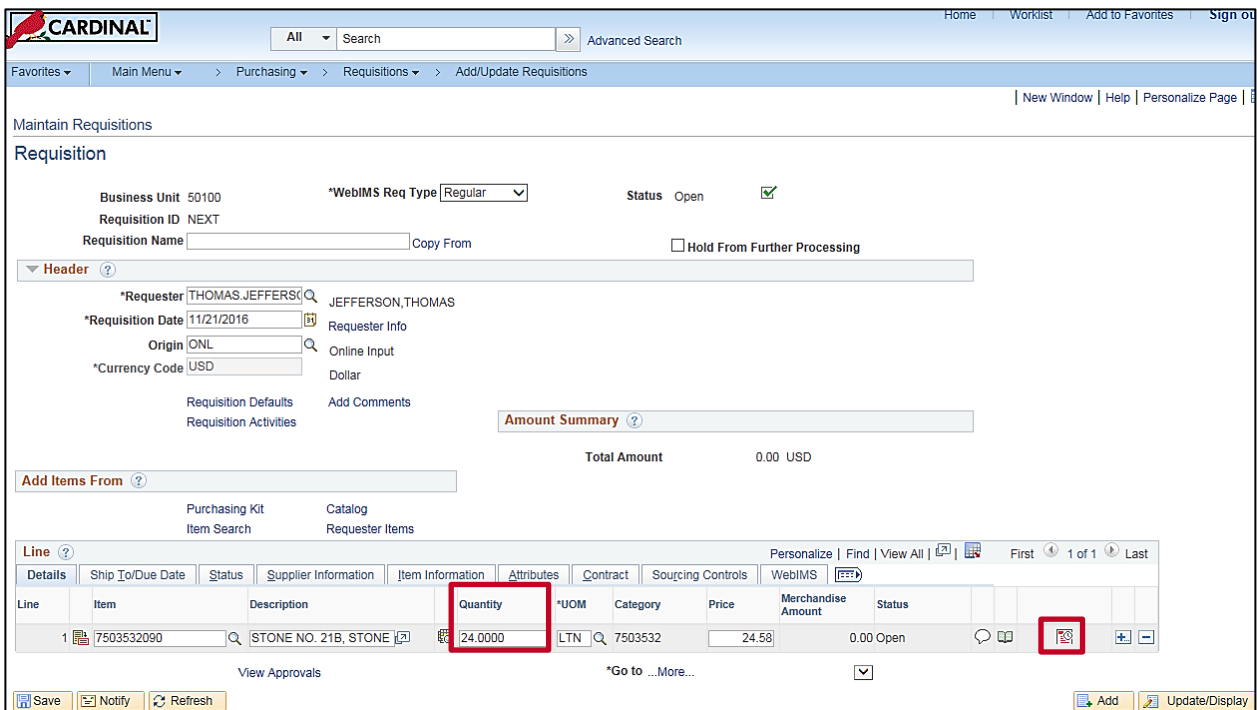
Line

Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available	GPO ID	GPO C
1	7503532090	STONE NO. 21B, STONE	00000000000000000000000044987		1		<input checked="" type="checkbox"/>		

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

Save Notify Refresh

- The **Item** details from the selected contract line populate the new requisition line.
- Click the **Details** tab.



Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

Header

*Requester THOMAS.JEFFERS JEFFERSON,THOMAS

*Requisition Date 11/21/2016 Requirer Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary

Total Amount 0.00 USD

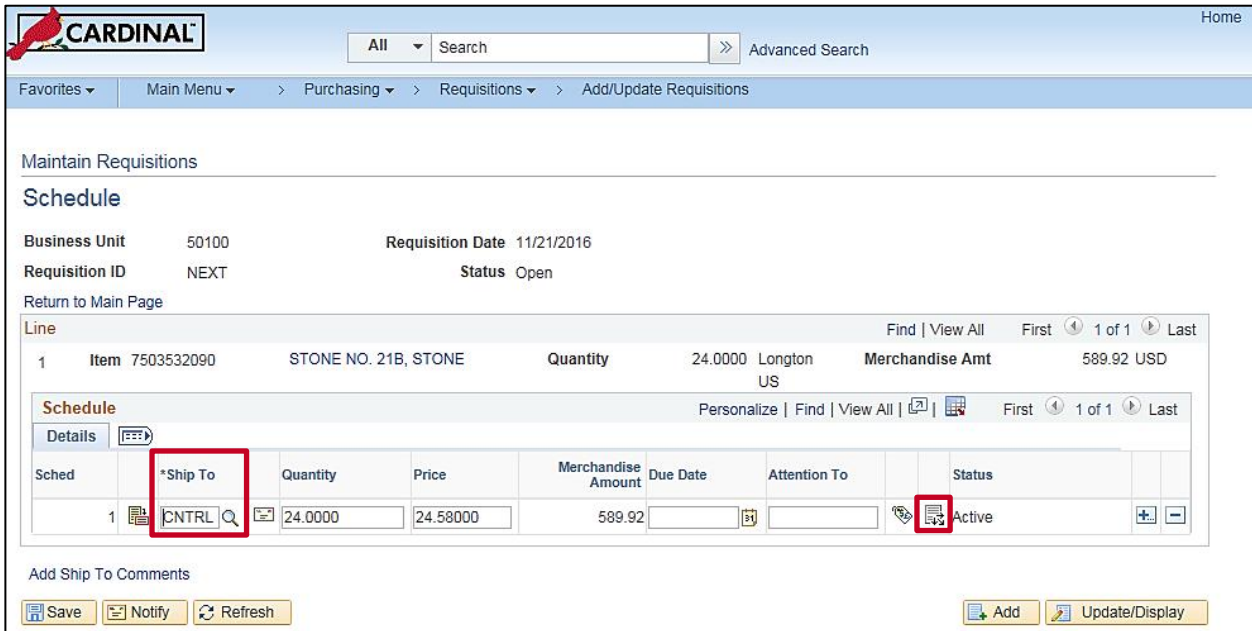
Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58	0.00	Open

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

Save Notify Refresh Add Update/Display

- Enter the **Quantity** requested.
- Click the **Schedule** icon.



Home

Cardinal

All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 11/21/2016

Requisition ID NEXT Status Open

Return to Main Page

Line	Item	Description	Quantity	Unit	Merchandise Amt
1	7503532090	STONE NO. 21B, STONE	24.0000	Longton US	589.92 USD

Find | View All | First 1 of 1 Last

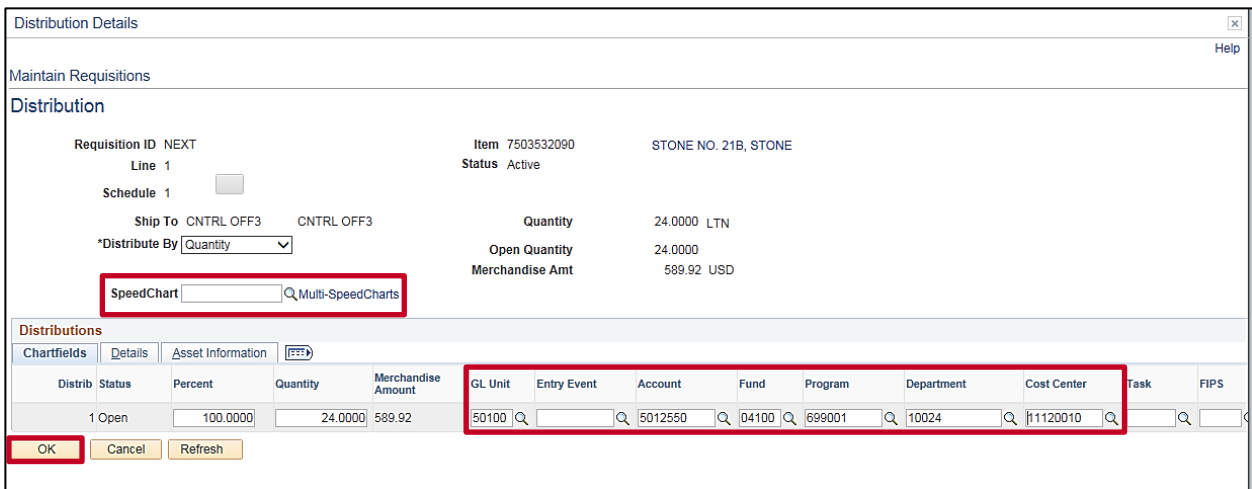
Schedule Personalize | Find | View All | First 1 of 1 Last

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	24.0000	24.58000	589.92			Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

16. **Ship To** location is populated based on the user defaults and can be edited if needed.
17. Click the **Distribution** icon.



Distribution Details

Maintain Requisitions

Distribution

Requisition ID NEXT Item 7503532090 STONE NO. 21B, STONE

Line 1 Status Active

Schedule 1

Ship To CNTRL OFF3 CNTRL OFF3 Quantity 24.0000 LTN

*Distribute By Quantity Open Quantity 24.0000

Merchandise Amt 589.92 USD

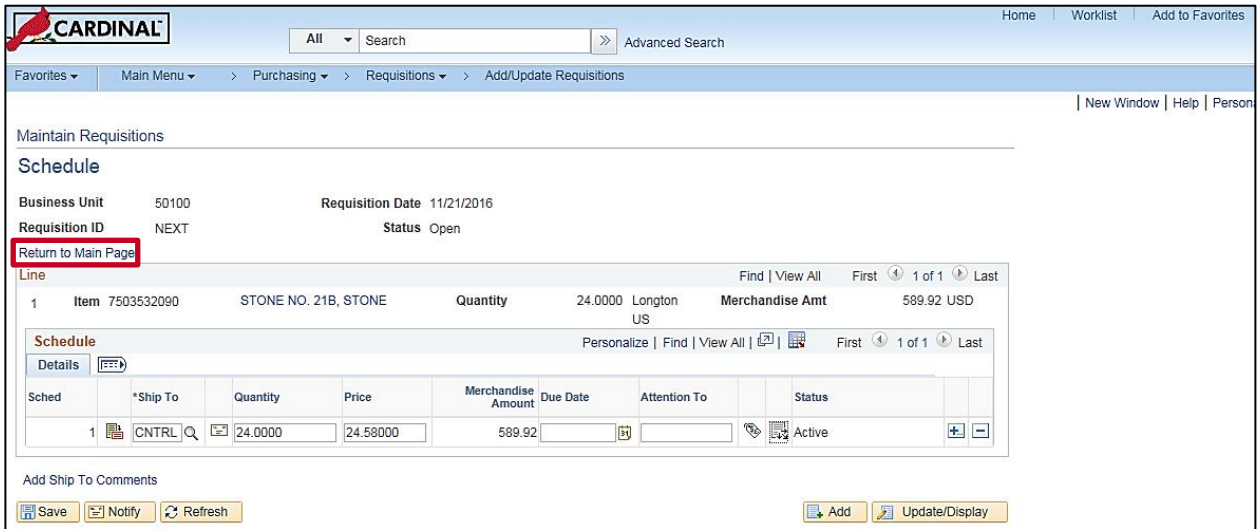
SpeedChart Multi-SpeedCharts

Distributions

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS
1	Open	100.0000	24.0000	589.92	50100		5012550	04100	699001	10024	11120010		

OK Cancel Refresh

18. Enter valid chart of accounts values. A **Schedule** may have one or more **ChartField** distributions. The **ChartField** values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center**, or **Project** values are required. You can manually enter a ChartField value, or you can use the **Multi-SpeedCharts** link to select a **SpeedChart** value to automatically populate some of the ChartField values for you.
19. You may insert or delete additional accounting distributions by scrolling right and clicking the (+)/(-) icons at the end of the accounting distribution line.
20. Click the **OK** button. You will return to the **Maintain Requisitions – Schedule** page.



CARDINAL | Home | Worklist | Add to Favorites
 All Search >> Advanced Search
 Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions | New Window | Help | Person

Maintain Requisitions

Schedule

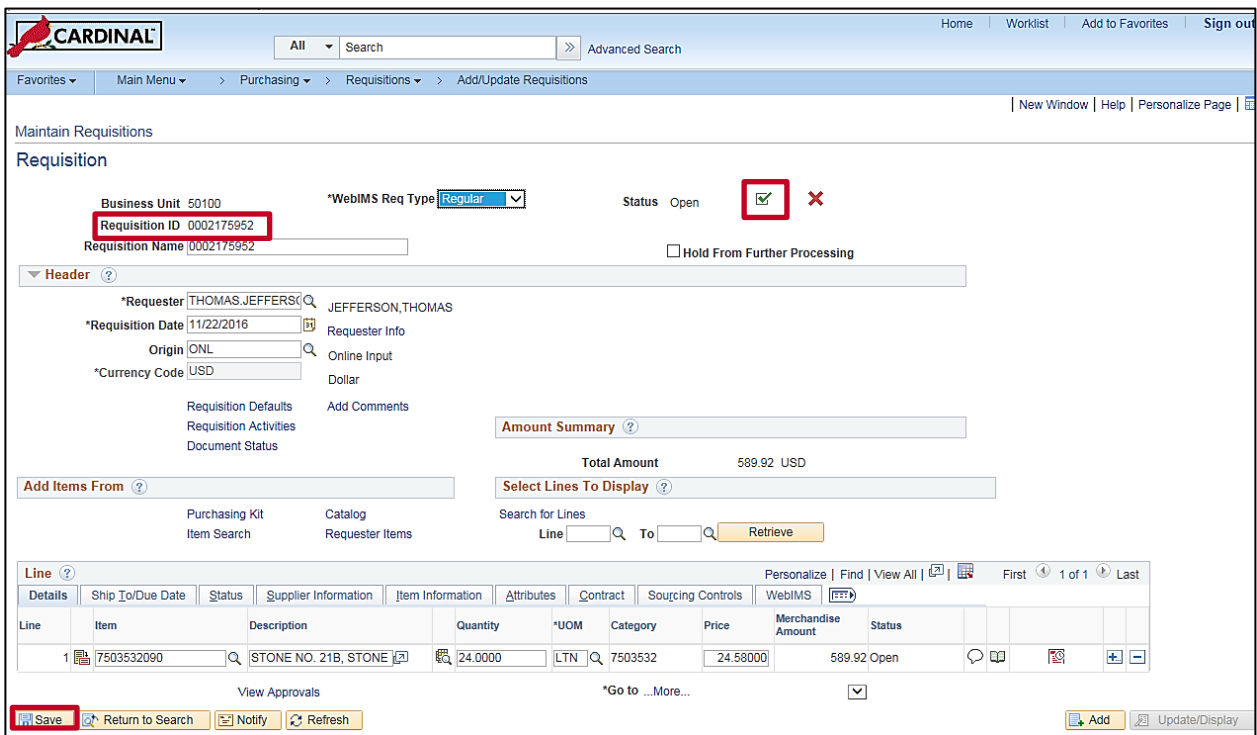
Business Unit 50100 Requisition Date 11/21/2016
 Requisition ID NEXT Status Open

Return to Main Page

Line	Item	Description	Quantity	Unit	Merchandise Amt	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	Longton US	589.92 USD	Active

Add Ship To Comments
 Save Notify Refresh Add Update/Display

21. Click the **Return to Main Page** link. The **Maintain Requisitions – Requisition** page displays.



CARDINAL | Home | Worklist | Add to Favorites | Sign out
 All Search >> Advanced Search
 Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions | New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open X
 Requisition ID 0002175952
 Requisition Name 0002175952 Hold From Further Processing

*Requester THOMAS.JEFFERS JEFFERSON, THOMAS
 *Requisition Date 11/22/2016 Requisition Info
 Origin ONL Online Input
 *Currency Code USD Dollar
 Requisition Defaults Add Comments
 Requisition Activities
 Document Status

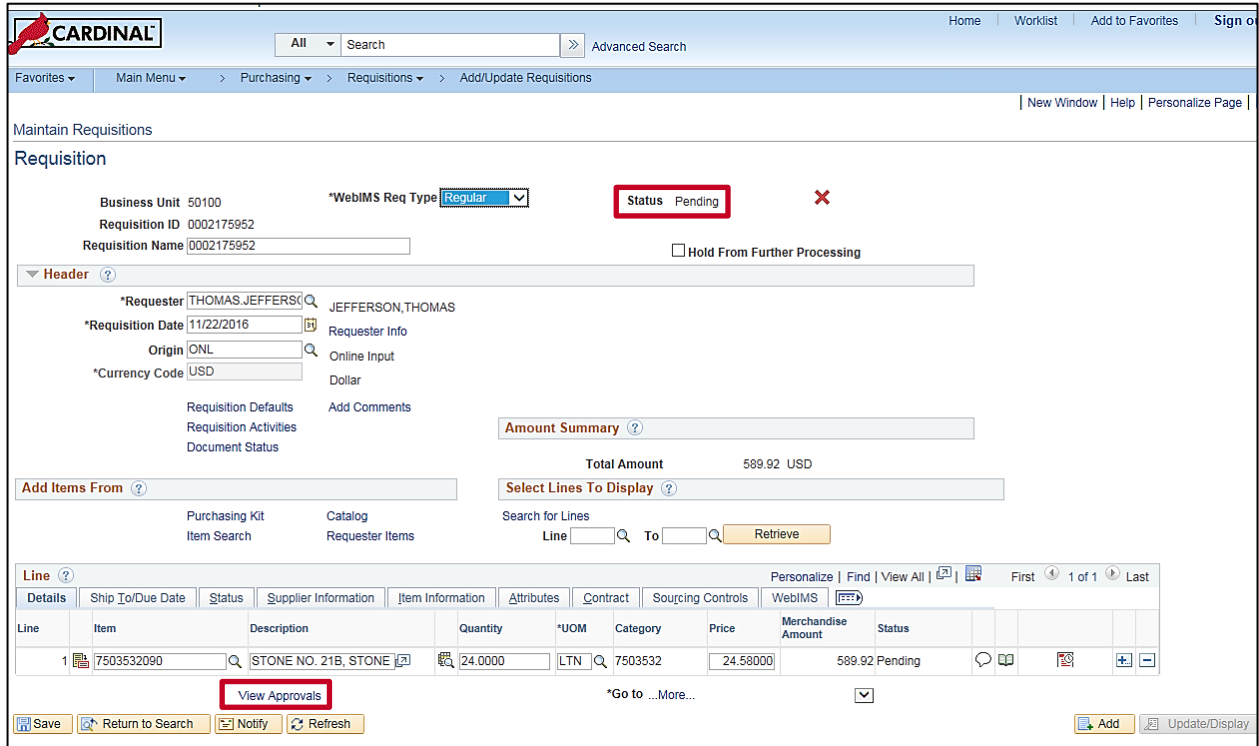
Add Items From Purchasing Kit Catalog
 Item Search Requisition Items

Amount Summary
 Total Amount 589.92 USD
 Select Lines To Display
 Search for Lines Line To Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58000	589.92	Open

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

22. Click the **Save** button.
23. Cardinal assigns a **Requisition ID** number upon save.
24. Click the **Submit for Approval** check-box (the green checkmark), which is next to the **Status** field, to send it forward for approval by your supervisor. If prompted to save, click the **Yes** button.



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

Requisition ID 0002175952

Requisition Name 0002175952 Hold From Further Processing

Header

*Requester THOMAS,JEFFERS(Q JEFFERSON,THOMAS

*Requisition Date 11/22/2016 Requester Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Document Status

Amount Summary

Total Amount 589.92 USD

Add Items From

Purchasing Kit Catalog

Item Search Requirer Items

Search for Lines

Line To Retrieve

Line

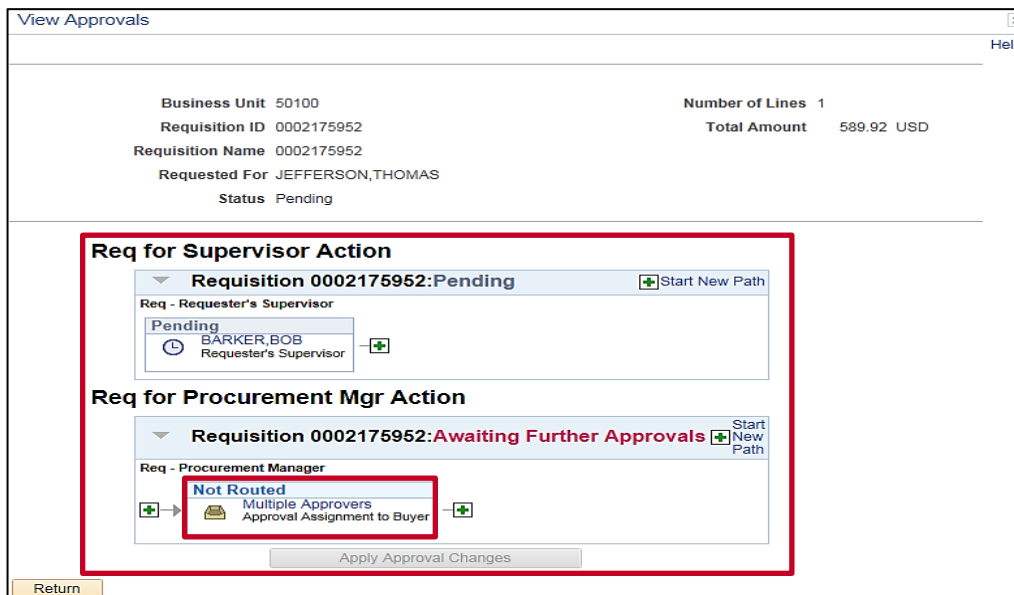
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58000	589.92	Pending

View Approvals

*Go to ...More...

Save Return to Search Notify Refresh Add Update/Display

- The requisition's **Status** changes to **Pending** and your supervisor is notified via email and worklist.
- Click the **View Approvals** link to view the pending and completed approval actions. If prompted to save, click the **Yes** button.



View Approvals

Business Unit 50100 Number of Lines 1

Requisition ID 0002175952 Total Amount 589.92 USD

Requisition Name 0002175952

Requested For JEFFERSON,THOMAS

Status Pending

Req for Supervisor Action

Requisition 0002175952:Pending Start New Path

Req - Requester's Supervisor

Pending

BARKER, BOB

Requester's Supervisor

Req for Procurement Mgr Action

Requisition 0002175952:Awaiting Further Approvals Start New Path

Req - Procurement Manager

Not Routed

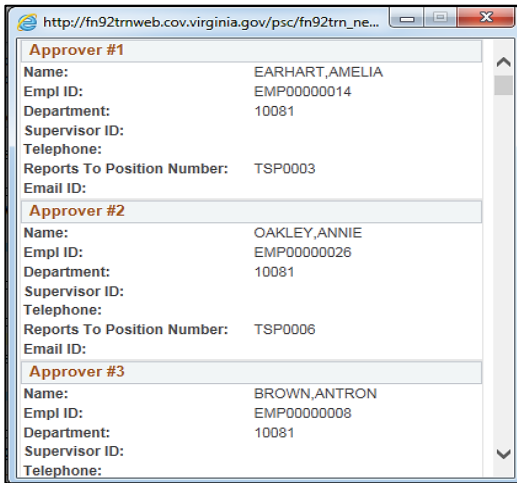
Multiple Approvers

Approval Assignment to Buyer

Apply Approval Changes

Return

- To view the list of approvers, click the **Multiple Approvers** link.



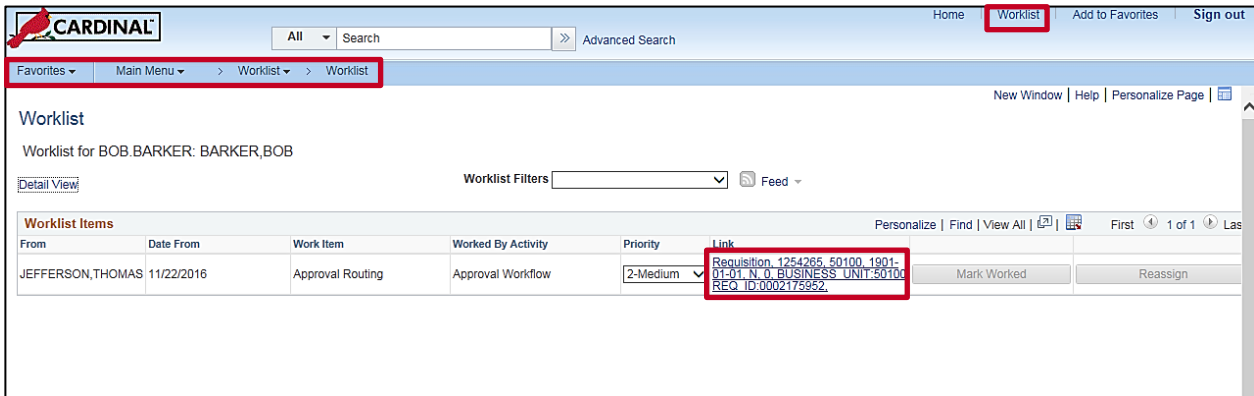
http://fn92trnweb.cov.virginia.gov/psc/fn92trn_ne...

Approver #1
 Name: EARHART,AMELIA
 Empl ID: EMP00000014
 Department: 10081
 Supervisor ID:
 Telephone:
 Reports To Position Number: TSP0003
 Email ID:

Approver #2
 Name: OAKLEY,ANNIE
 Empl ID: EMP00000026
 Department: 10081
 Supervisor ID:
 Telephone:
 Reports To Position Number: TSP0006
 Email ID:

Approver #3
 Name: BROWN,ANTRON
 Empl ID: EMP00000008
 Department: 10081
 Supervisor ID:
 Telephone:

28. Your supervisor will be notified of the pending approval via email and their worklist.



Home **Worklist** Add to Favorites Sign out

Search Advanced Search

Favorites Main Menu > Worklist > Worklist

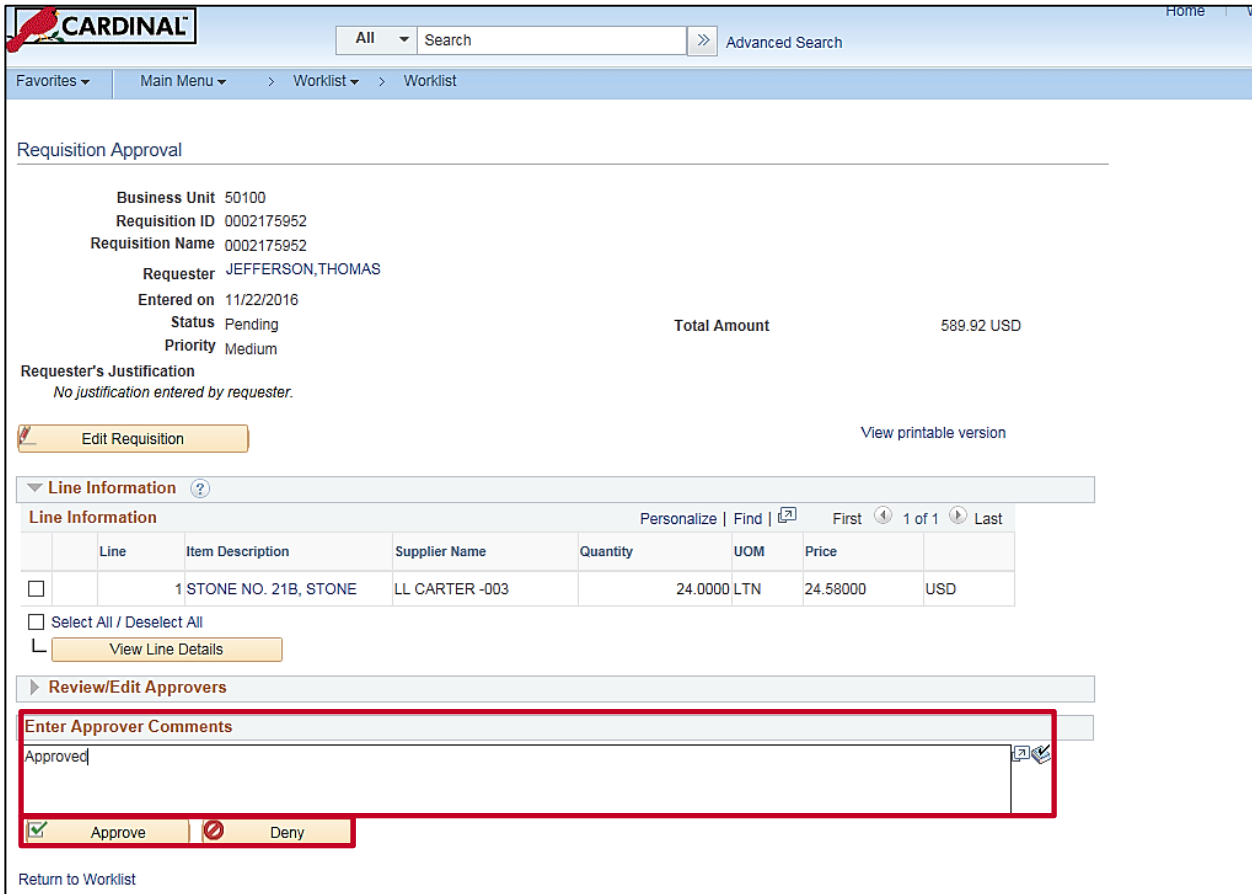
Worklist

Worklist for BOB.BARKER: BARKER,BOB

Detail View Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
JEFFERSON,THOMAS	11/22/2016	Approval Routing	Approval Workflow	2-Medium	Requisition 1254265, 50100, 1901-01-01, N.O. BUSINESS UNIT:50100, REQ ID:0002173952.	Mark Worked	Reassign

29. From the **Worklist**, your supervisor can open the item by clicking the requisition's link.



Requisition Approval

Business Unit 50100
 Requisition ID 0002175952
 Requisition Name 0002175952
 Requester JEFFERSON, THOMAS
 Entered on 11/22/2016
 Status Pending
 Priority Medium
 Total Amount 589.92 USD

Requester's Justification
 No justification entered by requester.

Line Information

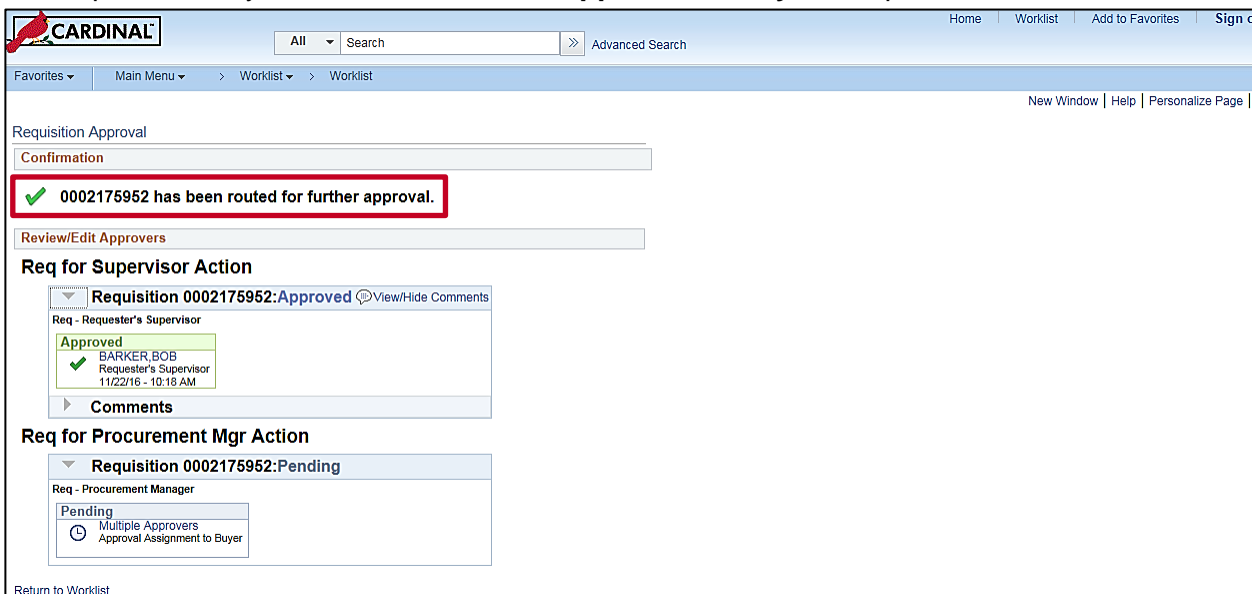
Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	STONE NO. 21B, STONE	LL CARTER -003	24.0000	LTN	24.58000	USD

Enter Approver Comments

Approved

Approve Deny

30. The supervisor may insert a comment and **Approve** or **Deny** the requisition.



Confirmation

0002175952 has been routed for further approval.

Req for Supervisor Action

Requisition 0002175952: Approved

Req - Requester's Supervisor

Approved
 BARKER, BOB
 Requester's Supervisor
 11/22/16 - 10:18 AM

Req for Procurement Mgr Action

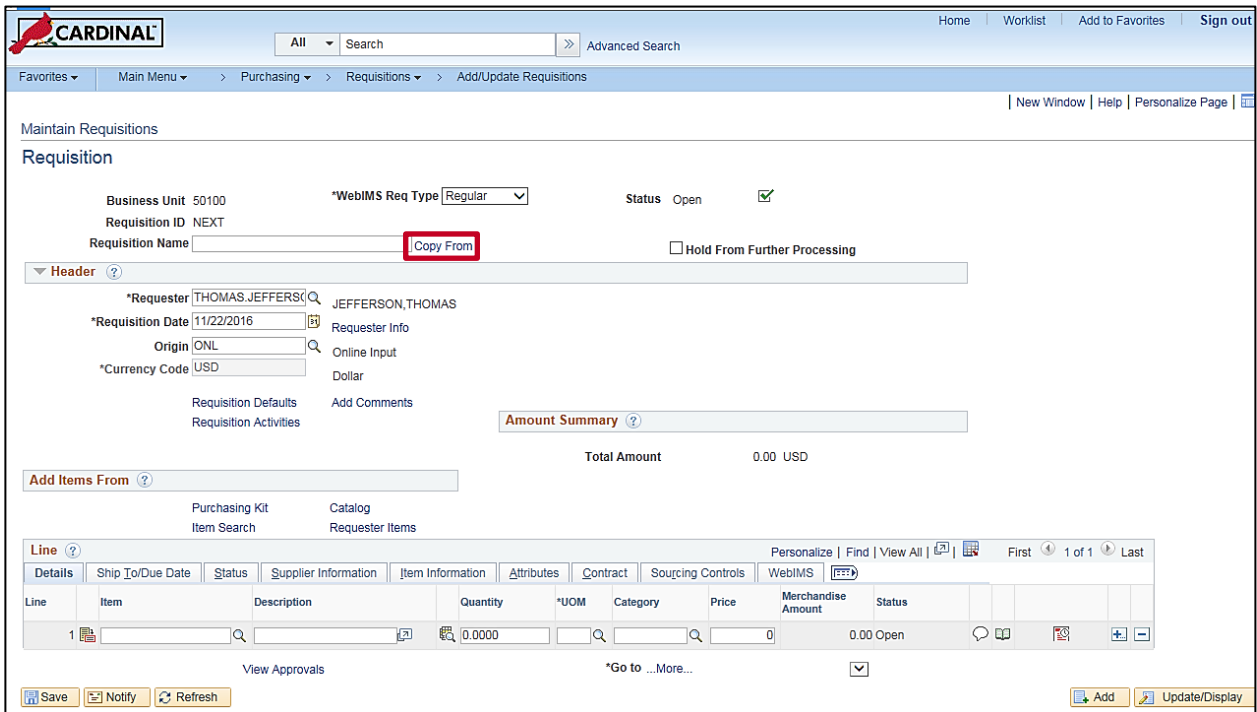
Requisition 0002175952: Pending

Req - Procurement Manager

Pending
 Multiple Approvers
 Approval Assignment to Buyer

31. Once approved, the requisition is forwarded to the Procurement Office for assignment to a buyer.

Create a Requisition from a Requisition



The screenshot shows the 'Maintain Requisitions' page in the Cardinal WebIMS system. The 'Requisition' header section includes fields for Business Unit (50100), WebIMS Req Type (Regular), Requisition ID (NEXT), and Requisition Name. A red box highlights the 'Copy From' link next to the Requisition Name field. Other fields include *Requester (THOMAS.JEFFERS), *Requisition Date (11/22/2016), Origin (ONL), and *Currency Code (USD). The 'Amount Summary' section shows a Total Amount of 0.00 USD. The 'Add Items From' section has buttons for Purchasing Kit, Catalog, Item Search, and Requester Items. The 'Line' table at the bottom shows one line item with a quantity of 0.0000 and a price of 0.00. The page includes navigation links like 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' at the top, and 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display' buttons at the bottom.

1. Repeat [steps 1-3 \(page 2\)](#).
2. Click the **Copy From** link.

Req Inquiry Selection Help

Maintain Requisitions

Copy Requisition

Header

Business Unit 50100

Requisition ID 0002175952

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID STATE Supplier Lookup

Supplier ID Supplier Details

Supplier Name

Item SetID STATE

Item ID

Item Description Direct Ship
254 characters remaining

Department

Requisition						Personalize	Find	View All	<input type="button" value="t"/>	<input type="button" value="Q"/>	First	1 of 1	Last	
Sel	Req ID	Requisition Name	Status	Origin	Requester									
<input type="checkbox"/>														

3. Enter the **Requisition ID** for the requisition you wish to copy.
4. Click the **Search** button.

Req Inquiry Selection Help

Maintain Requisitions

Copy Requisition

Header

Business Unit

Requisition ID

Requisition Name

Req Status Origin

Requester

Requester Name

Requisition Date To

Supplier SetID

Supplier ID Supplier Name

Item SetID Item ID

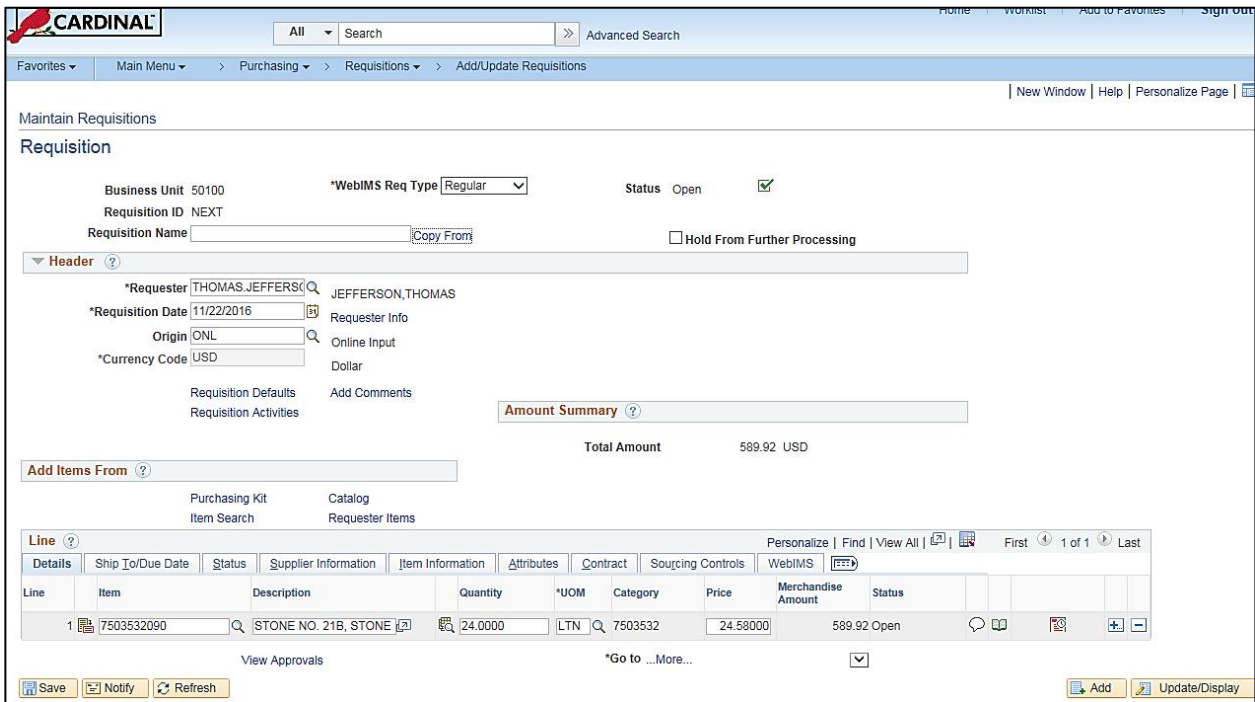
Item Description Direct Ship

254 characters remaining

Department

Requisition						Personalize	Find	View All	Print	First	1 of 1	Last
Sel	Req ID	Requisition Name	Status	Origin	Requester							
<input checked="" type="checkbox"/>	0002175952	0002175952	Pending Approval	ONL	THOMAS.JEFFERSON							

- From the search results, located below the **Search** button, select the requisition by clicking the **Sel** check-box.
- Click the **OK** button to select that requisition to copy.



The screenshot shows the 'Maintain Requisitions' page in the Cardinal system. The requisition is for Business Unit 50100, Requisition ID NEXT, and Requisition Name [redacted]. The status is 'Open'. The header shows the requester as THOMAS.JEFFERS, with a requisition date of 11/22/2016 and an origin of ONL. The currency is USD. An amount summary shows a total amount of 589.92 USD. Below this, there are options to 'Add Items From' via 'Purchasing Kit Item Search' or 'Catalog Requirer Items'. A table with one line item is visible, showing a quantity of 24.0000 for item 7503532090 (STONE NO. 21B, STONE). The table has columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status.

7. The Requisition displays with all copied values, including accounting distribution.
8. Repeat steps 13-24 from above, as applicable. Be careful to review and update all fields, such as quantity and accounting distribution, as needed. The requisition is complete and pending approval.

Requisition Helpful Hints – Item Information



This screenshot shows the 'Item Information' tab for a requisition line. The 'Manufacturer ID' field is highlighted with a red box and contains the value '920253'. The 'Manufacturer's Item ID' field is also highlighted with a red box and contains the value '920253'. The line item is for item 0051404115 (ABRASIVES). The table has columns for Line, Item, Description, GTIN, RFQ Required, Device Tracking, Supplier Item ID, Supplier's Catalog, Manufacturer ID, and Manufacturer's Item ID.

1. The **Item Information** tab allows you to enter specific supplier item information (e.g., Grainger Catalog, Version 13, pg. 6. Item # XXXXXX).
2. For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.
3. To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.