Inventory Issuance Overview

This Job Aid provides step-by-step instructions for creating and managing an Inventory Issuance Requisition in the Cardinal system. It outlines the process from initiating a Requisition to validating inventory availability in WebIMS, and includes guidance on entering key data such as Requisition details, ChartField distributions, and WebIMS-specific information. It also includes instructions on viewing completed Issuance Requisitions.

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.

Table of Contents

Revision History

Revision Date	Summary of Changes
3/11/2026	Baseline.

Creating an Inventory Issuance Requisition

Like regular Requisitions, an Inventory Issuance Requisition is created in the Purchasing module.

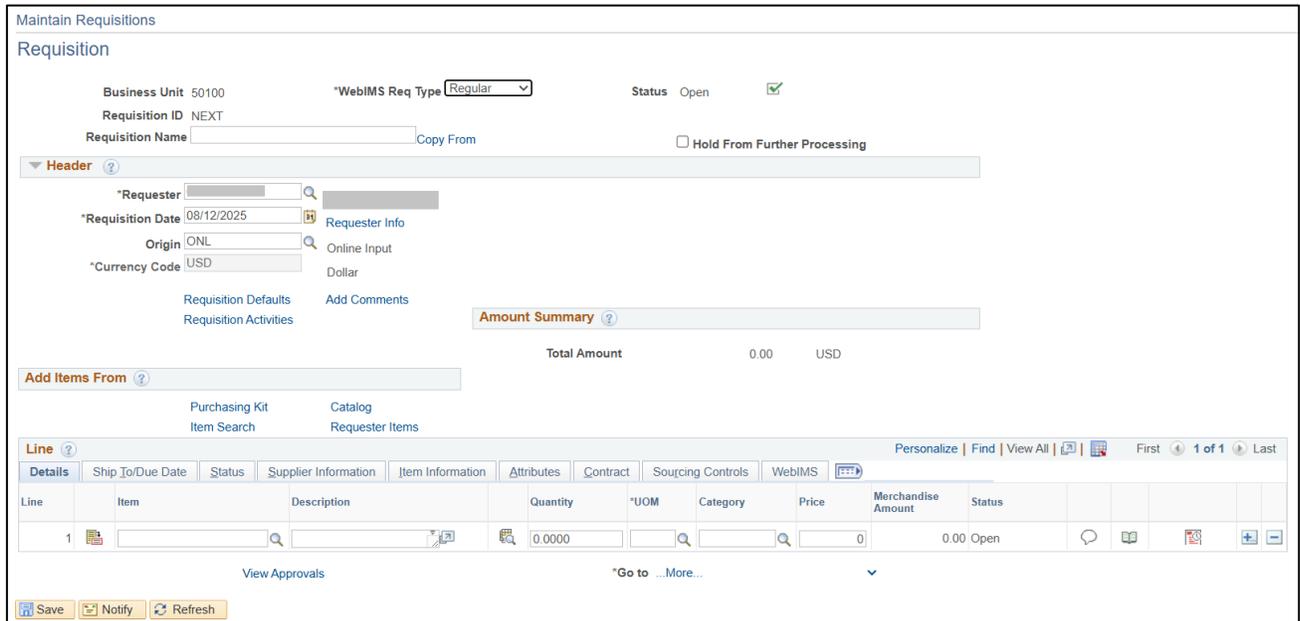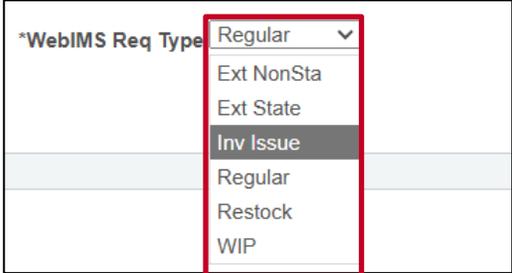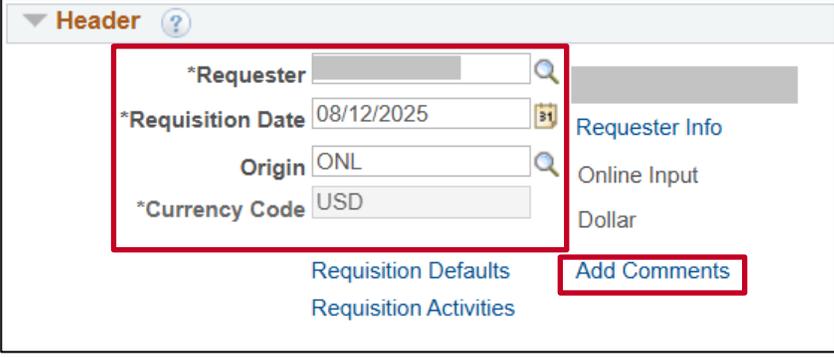| Step	Action
1.	Navigate to the **Requisitions Add a New Value** page using the following path: **Main Menu > Purchasing > Requisitions > Add/Update Requisitions**

The **Requisitions Add a New Value** page displays.

Requisitions

Add a New Value   Find an Existing Value

*Business Unit 50100
*Requisition ID NEXT
Add

Step	Action
2.	Click the **Add** button.

*Business Unit 50100
*Requisition ID NEXT
Add

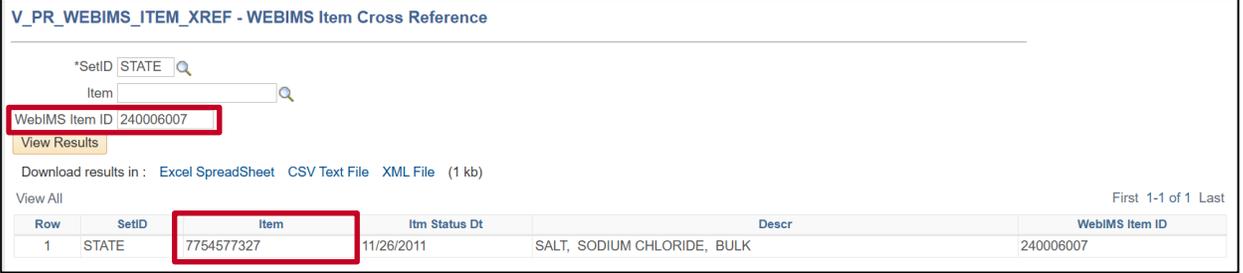The **Maintain Requisitions Requisition** page displays.

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 _____ 🔍 _____

*Requisition Date 08/12/2025 📅 Requester 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   Requester Items

Line ?   Personalize | Find | View All | 🔁 | 🖩   First ◀ 1 of 1 ▶ Last

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

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1 📄	🔍	📄 🔍	0.0000		🔍	0	0.00	Open	💬	📖	📄	➕ ➖

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

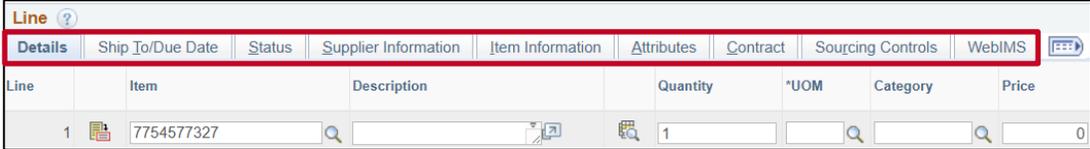💾 Save   ✉ Notify   🔄 Refresh

Step	Action
3.	Click the **WebIMS Req Type** dropdown button and select the applicable option. **Note**: This step must be completed first. *WebIMS Req Type: Regular ▾ Ext NonSta Ext State Inv Issue Regular Restock WIP
ℹ	**External Sales – Non-State Agency** (Ext NonSta): The selling of materials to any non-state Agency. This includes cities, counties, towns, and other governmental entities not termed a state Agency. It also includes sales to private contractors if they have been approved (e.g., Turnkey Asset Maintenance Services (TAMS) contractors). **External Sales – State Agency** (Ext State): The selling of materials to another state Agency. **Inventory Issuance** (Inv Issue): A request (Requisition) for Item(s) in WebIMS stock. The Requisition includes details about the Item(s), description, quantity, unit of measure, unit price, and total price information for each Line. **Work in Process** (WIP): Taking two or more Items and making something that is different (e.g., mixing salt and sand and the combined Items become mixed abrasives). Each Item has a unique National Institute of Governmental Purchasing (NIGP) stock number. **Note**: **Regular** and **Restock** are not used with Issuance Requisitions.
ℹ	After an option is selected, the **WebIMS Req Type** field grays out and cannot be changed, even if the Requisition has not been saved. If an incorrect option was selected, the Requisition must be restarted from the beginning.
4.	Enter a descriptive title in the **Requisition Name** field. Otherwise, the Requisition Name will default to the Requisition ID. Requisition Name: SALT ISSUE - 25-1

Step	Action
(i)	The **Header** section contains key data such as **Requester**, **Requisition Date**, and **Origin**. Header comments can also be added in this section using the **Add Comments** link.
5.	Enter the National Institute of Governmental Purchasing (NIGP) Item number in the **Item** field.
(i)	If an Item's WebIMS Item ID is known, but the NIGP Item number is unknown, open the **Query Viewer** and use the **WEBIMS Item Cross Reference** query (**V_PR_WEBIMS_ITEM_XREF**) to look up the **WebIMS Item ID** and find the NIGP Item number.
6.	Enter the desired quantity to issue in the **Quantity** field.
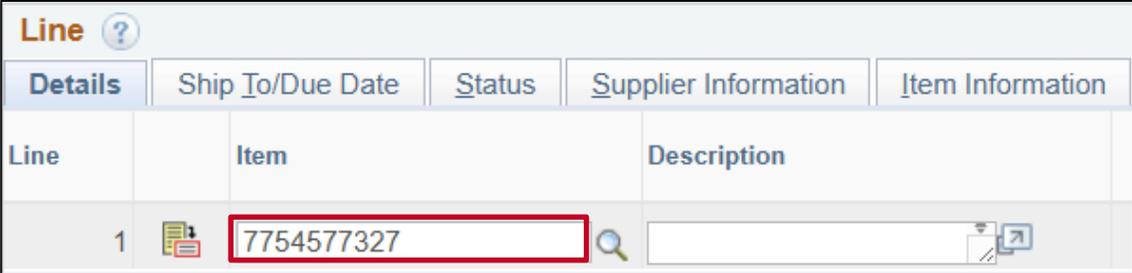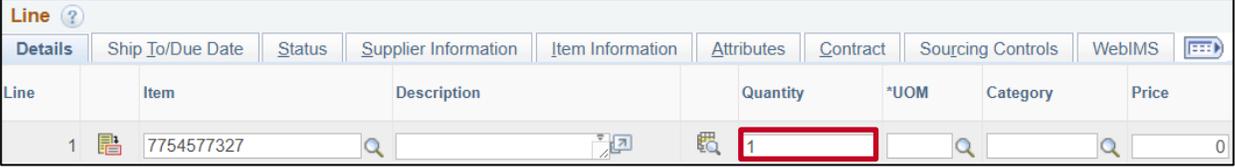
Step	Action
ℹ	In the **Line** section there are multiple tabs which contain information about each Line Item: **Details**, **Ship To/Due Date**, **Status**, **Supplier Information**, **Item Information**, **Attributes**, **Contract**, **Sourcing Controls**, and **WebIMS**. (The **WebIMS** tab is only used by the Storekeeper to manage WebIMS Inventory Requisitions.)
7.	Click the **Comments** icon on each Line to enter comments or add attachments.
ℹ	For a list of the file extensions that are allowed as attachments in Cardinal, see Appendix: Allowed Extensions on Attachments in Cardinal at the end of this document.
8.	Click the **Schedule** icon on the **Details** tab.

The **Maintain Requisitions Schedule** page displays.

Step	Action
9.	Update the **Ship To** field as needed.

Sched		*Ship To	
1	🖳	BEACH AI 🔍	🖳

ℹ️	The **Ship To** field identifies the location from which the stock is issued. Only locations that the Storekeeper is authorized to issue from or order to are available for selection.

ℹ️	Do not click the **Add** button (**+**) to add a schedule. Even though the system allows for multiple schedules, there should be only one schedule per Requisition Line. Do not enter more than one schedule (e.g., another Ship To location) for a Line.
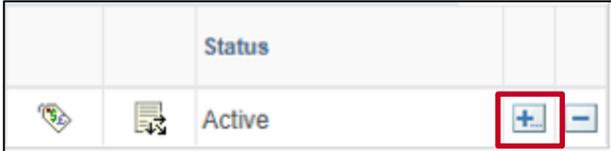
		Status		
🏷️	🖳	Active	➕	➖

10.	Click the **Distribution** icon to enter the accounting distribution for a Line.
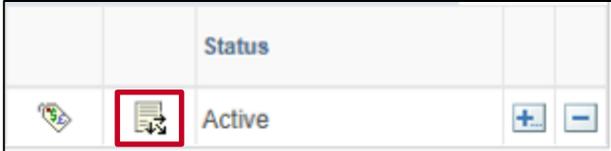
		Status		
🏷️	🖳	Active	➕	➖

The **Maintain Requisitions Distribution** window displays with the **Chartfields** tab selected by default.

Distribution Details

Maintain Requisitions

Distribution

Requisition ID	NEXT		Item	7754577327	SALT, SODIUM CHLORIDE, FOR ROA
Line	1		Status	Active	
Schedule	1				
Ship To	BEACH AHQ	BEACH AHQ	Quantity	1.0000 LTN	
*Distribute By	Quantity		Open Quantity	1.0000	
			Merchandise Amt	103.15 USD	
SpeedChart		🔍 Multi-SpeedCharts			

Distributions

Chartfields | Details | Asset Information | 🖳

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset
1	Open	100.0000	1.0000	103.15	50100 🔍	🔍	5012550 🔍	🔍	🔍	14037 🔍	🔍	🔍	🔍	

OK | Cancel | Refresh

11.	Enter valid ChartField values.

Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	PC Bus Unit	Project
🔍	5012550 🔍	04100 🔍	699001 🔍	10003 🔍	11120010 🔍	🔍	🔍	🔍	🔍	🔍	🔍	🔍

Step	Action
ℹ️	A Schedule may have one or more ChartField distributions. The ChartField values identify the accounting distribution. Valid Account, Department, Cost Center, or Project values are required. Manually enter ChartField values or click the **SpeedChart Look up** icon to select a SpeedChart value and automatically populate some of the ChartField values. For Inventory Issuances, the Requester should inform the Storekeeper of the applicable ChartField distribution to charge.
12.	Scroll to the right and click the **Add/Delete** button (**+/-**) at the end of the accounting distribution Line to insert or delete additional accounting distributions, if needed. 	Subcategory	Affiliate	Fund Affiliate			
---	---	---	---	---	---	
13.	Click the **OK** button. OK Cancel Refresh
	The **Maintain Requisitions Schedule** page displays. Maintain Requisitions Schedule **Business Unit** 50100 **Requisition Date** 08/12/2025 **Requisition ID** NEXT **Status** Open Return to Main Page **Line** Find | View All First ◀ 1 of 1 ▶ Last 1 Item 7754577327 SALT, SODIUM CHLORIDE, FOR ROA **Quantity** 1.0000 Longton**Merchandise Amt** 103.15 USD US **Schedule** Personalize | Find | View All | 🔲 | 🔳 First ◀ 1 of 1 ▶ Last Details 📋 | Sched		*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To			Status		
---	---	---	---	---	---	---	---	---	---	---	---	---
1	📋	BEACH A🔍	1.0000	103.15000	103.15	08/12/2025 📅		🏷️	🗂️	Active	➕ ➖		
14.	Click the **Return to Main Page** link. **Business Unit** 50100 **Requisition ID** NEXT Return to Main Page

Step	Action
	The **Maintain Requisitions Requisition** page displays.

15.	Click the **WebIMS** tab in the **Line** section.

The **WebIMS** tab displays.

16.	Confirm that there is a **WebIMS Item ID**, indicating that the Item is in WebIMS.

Step	Action
17.	Click the **WebIMS Condition Code** dropdown button and select the applicable WebIMS Condition Code. **WebIMS Condition Code** / **WebIMS Issued Date** New ▾ 08/12/2025 📅
18.	Click the **WebIMS Issued Date Calendar** icon and select the actual date of issuance. **WebIMS Condition Code** / **WebIMS Issued Date** New ▾ 08/12/2025 📅
19.	Click the **Save** button. 💾 Save ✉ Notify ♻ Refresh
20.	Click the **Submit for Approval** checkmark icon. **Status** Open ☑ ✖
	The **Status** is changed to "Approved", and the checkmark icon disappears. **Status** Approved ✖
ℹ	Once an Inventory Issuance Requisition is approved, WebIMS needs to be checked to determine if there is enough stock for each Item ordered using the **Validate WebIMS** button on the **WebIMS** tab.
21.	Click the **Validate WebIMS** button on the **WebIMS tab**. This will create a WebIMS Document ID and check if there is enough inventory at this location to fill the order. **Validate WebIMS** Validate WebIMS ➕ ➖
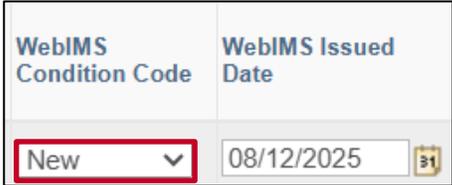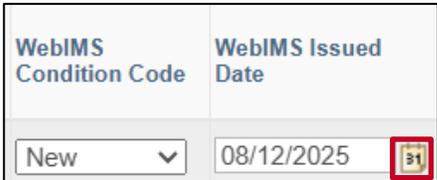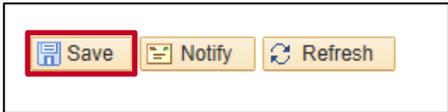
Step	Action
	A message window displays with the new **WebIMS Document ID** for that Line. **Message** WebIMS Document ID is :I000773995 OK Cancel
22.	Click the **OK** button. OK Cancel
ℹ️	If there is insufficient stock in WebIMS for a Requisition Line, an error message window is displayed. The Storekeeper has two options: 1. Adjust the **Quantity** field on the **Details** tab to match the available WebIMS quantity. **Line** ? **Details** | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract 	Line	Item	Description	Quantity
1	7754577327	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	1.0000 | ○ A new WebIMS Document ID will be generated for the Line. ○ The Requisition will be fulfilled as an Issuance Requisition. 2. Cancel the Requisition Line by clicking the **Cancel** icon (red x) on the **Status** tab. **Line** ? Personalize | Find | View All | 🔳 | 🔳 First ◀ 1 of 1 ▶ Last Details | Ship To/Due Date | **Status** | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | WebIMS | Line	Item	Description	Status		
1	7754577327	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	Approved	✖	➕ ➖	
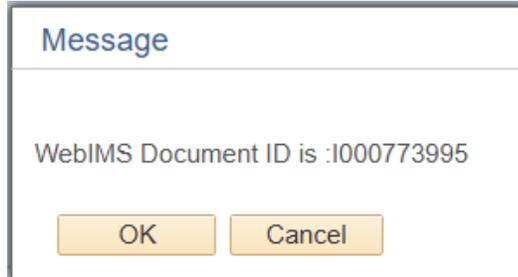
Step	Action
	Once all of the Lines on the Issuance Requisition have been satisfied by either issuance or cancelation, a message window displays, explaining that the Requisition's **Status** has been set to **Complete**. **Message** IMS Requisition 50100/0002418166 has been set to complete status [OK] [Cancel]
23.	Click the **OK** button. [OK] [Cancel]
ⓘ	Once a Line on the Requisition has been marked Complete, neither the Line nor the Requisition can be canceled.

View Completed Issuance Requisitions

Step	Action
1.	To view completed Requisitions, navigate to the **Requisition Inquiry** page using the following path: **Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions**

The **Requisition Inquiry** page displays.

Requisition Inquiry

Business Unit	50100
Requisition ID		To Req	
Requisition Name	
Req Status		Origin	
Requester	
Requester Name	
Requisition Date		To	
Supplier SetID STATE	Supplier Lookup
Supplier ID	Supplier Details	Supplier Name	
Item SetID STATE	Item ID	
Item Description	
254 characters remaining	☐ Direct Ship
Department	

OK   Cancel

Step	Action
2.	Select the **Req Status** of "C" (Complete) and any additional information to narrow down the search results.

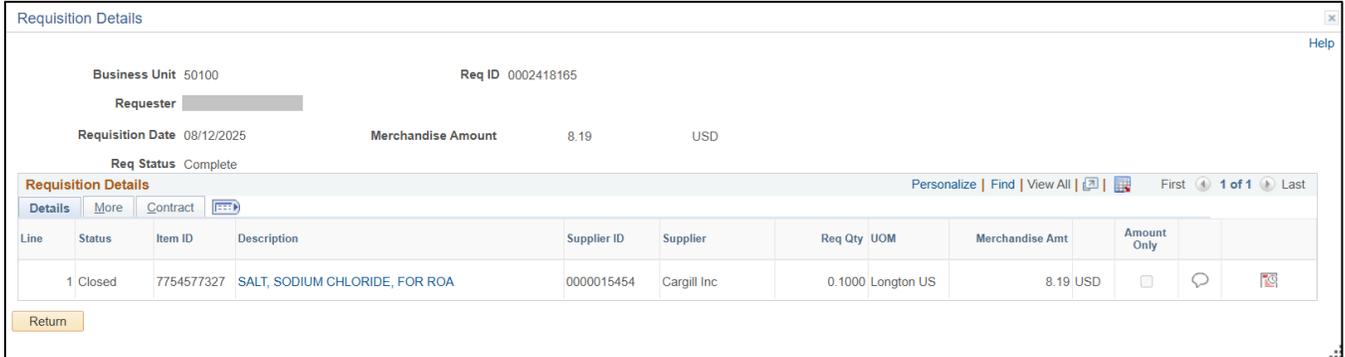Req Status C   Origin

Requester

Requester Name

Requisition Date 08/03/2025   To 08/12/2025

Step	Action
ⓘ	If an Issuance Requisition's WebIMS Doc ID is known, but its Requisition ID is unknown, open the **Query Viewer** and use the **IMS Requisition Doc ID Xrefer** query (**V_PR_WEBIMS_IMS_DOCID_REQ_XREF**) to look up the **WebIMS Doc ID** number and find its Requisition ID in the **Req ID** field. **V_PR_WEBIMS_IMS_DOCID_REQ_XREF - IMS Requisition Doc ID Xrefer** *Unit 50100 Req ID WebIMS Doc ID I000773993 View Results Download results in : Excel SpreadSheet CSV Text File XML File (1 kb) View All First 1-1 of 1 Last Row 1 — Unit 50100 — Req ID 0002418163 — Line 1 — Item 7754577327 — More Info: SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK — WebIMS Doc ID I000773993
3.	Click the **OK** button. [OK] [Cancel]
	The **Requisitions** page populates based on the search criteria. **Requisitions** **Req Inquiry** Personalize | Find | View All | 🗗 | 🖩 First ◀ 1-2 of 2 ▶ Last **Details** | **Status** <table><tr><th>Unit</th><th>Requisition</th><th>Requisition Name</th><th>Requisition Status</th><th>Requester</th><th>Req Date▼</th><th>Total Amt</th></tr><tr><td>50100</td><td>0002418165</td><td>Salt Issue - 25</td><td>Complete</td><td></td><td>08/12/2025</td><td>8.19 USD</td></tr><tr><td>50100</td><td>0002418163</td><td>Salt-25</td><td>Complete</td><td></td><td>08/05/2025</td><td>0.82 USD</td></tr></table>
4.	Click the link of the **Requisition** to be viewed. **Requisition** 0002418165

Step	Action
	The **Requisition Details** window displays.
5.	Click the **Schedule Details** icon to review shipping details for the selected Line.
	The **Schedule Details** page displays.
6.	Click the **Distribution Details** icon to review the accounting distribution details for the selected Line.

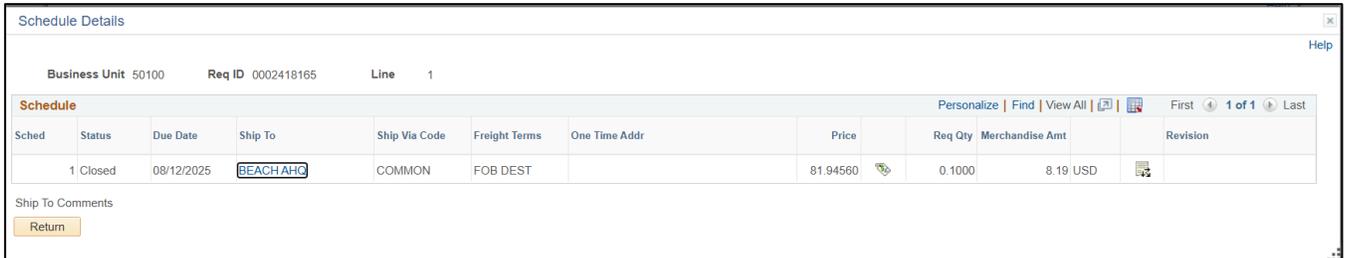| Step	Action
	The Distribution Details page displays. **Distribution Information** Business Unit 50100 Req ID 0002418165 Line 1 Sched Num 1 **Distribution** — Personalize | Find | View All | 📄 | 📊 First ◄ 1 of 1 ► Last Details | More | Asset Information | Distrib	Status	Location	Req Qty	Merchandise Amt	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
---	---	---	---	---	---	---	---	---	---	---	---	---
1	Complete	BEACH AHQ	0.1000	8.19 USD	50100		5012550	04100	699001	10003	11120010		 Return
7.	Click the **Return** button. Return
	The Schedule Details page displays. **Schedule Details** Business Unit 50100 Req ID 0002418165 Line 1 **Schedule** — Personalize | Find | View All | 📄 | 📊 First ◄ 1 of 1 ► Last 	Sched	Status	Due Date	Ship To	Ship Via Code	Freight Terms	One Time Addr	Price	Req Qty	Merchandise Amt	Revision
---	---	---	---	---	---	---	---	---	---	---
1	Closed	08/12/2025	BEACH AHQ	COMMON	FOB DEST		81.94560	0.1000	8.19 USD		 Ship To Comments Return
8.	Click the **Return** button. Return
	The Requisition Details page displays. **Requisition Details** Business Unit 50100 Req ID 0002418165 Requester ▓▓▓▓▓ Requisition Date 08/12/2025 Merchandise Amount 8.19 USD Req Status Complete **Requisition Details** — Personalize | Find | View All | 📄 | 📊 First ◄ 1 of 1 ► Last Details | More | Contract 	Line	Status	Item ID	Description	Supplier ID	Supplier	Req Qty	UOM	Merchandise Amt	Amount Only		
---	---	---	---	---	---	---	---	---	---	---	---
1	Closed	7754577327	SALT, SODIUM CHLORIDE, FOR ROA	0000015454	Cargill Inc	0.1000	Longton US	8.19 USD	☐	💬	📄	 Return

Step	Action
9.	Click the **Return** button. Return

The **Requisitions** page displays.

Requisitions
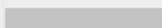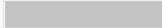
Req Inquiry					Personalize | Find | View All | 🗗 | 📇	First ◀ 1-2 of 2 ▶ Last
Details	**Status** 🎛					
Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date▼	Total Amt
50100	0002418165	Salt Issue - 25	Complete		08/12/2025	8.19 USD
50100	0002418163	Salt-25	Complete		08/05/2025	0.82 USD

Search

📧 Notify

Step	Action
10.	Click the **Search** link to find and review another Requisition if needed. Search 📧 Notify
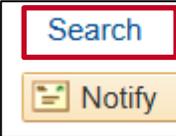
Appendix: Allowed Extensions on Attachments in Cardinal

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 of the Agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the Agency apart from the Cardinal attachment functionality.

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