## Maintaining Requisitions Overview

This Job Aid provides instructions for maintaining Requisitions in Cardinal. Users can access, review, update, and cancel Requisitions from the **Purchasing** module.

Requisitions may be updated to reflect changes in quantities, shipping details, Line Items, Schedules, Distributions, or attachments. A Requisition may be edited or canceled as long as it has not been sourced to a Purchase Order or Sourcing Event. A Requisition can be modified even after it has been approved; however, changes that increase the price or quantity may trigger the approval workflow again.

Requisition status and approval details can be reviewed in two ways:

- **Maintain Requisitions – Requisition** page: Displays Requisition details, approval status, and links to the approval monitor.
- **Review Requisition Information** page: Allows users to view Requisitions that are complete, canceled, or do not require modifications. This page also provides access to related Purchase Orders, Receipts, and Vouchers.

Using these tools, users can monitor Requisition activity, confirm approval progress, and view connected purchasing transactions for greater transparency and accuracy.

**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.

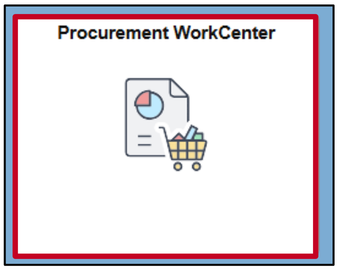
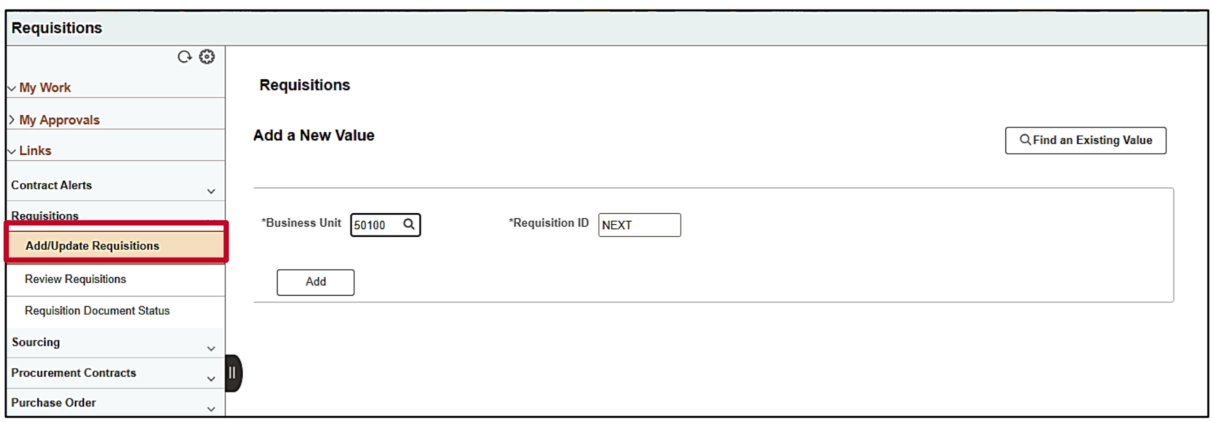
## Table of Contents

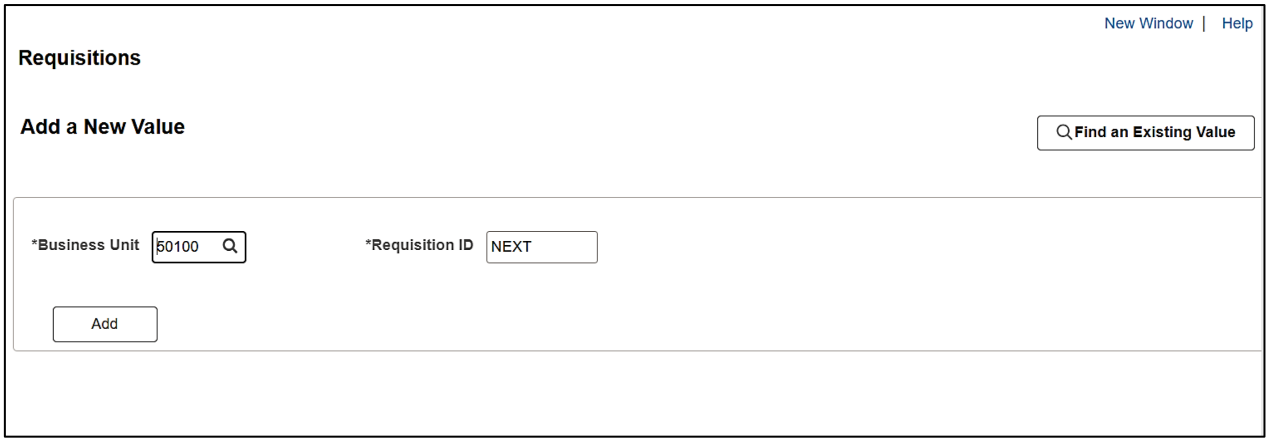
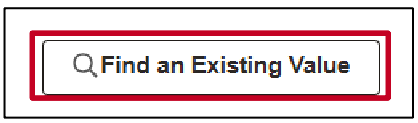
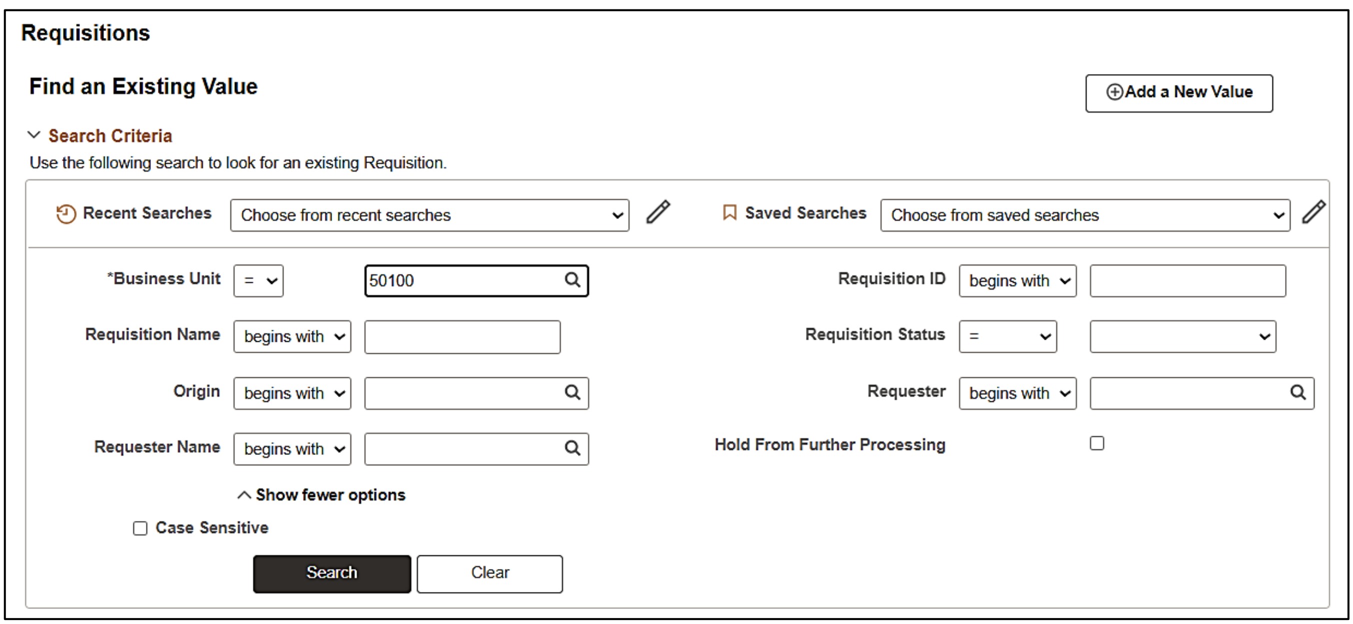
## Revision History

| Revision Date | Summary of Changes |
|---|---|
| 9/1/2026 | Updated to reflect the Cardinal system upgrades. |
| 4/6/2026 | Baseline. |

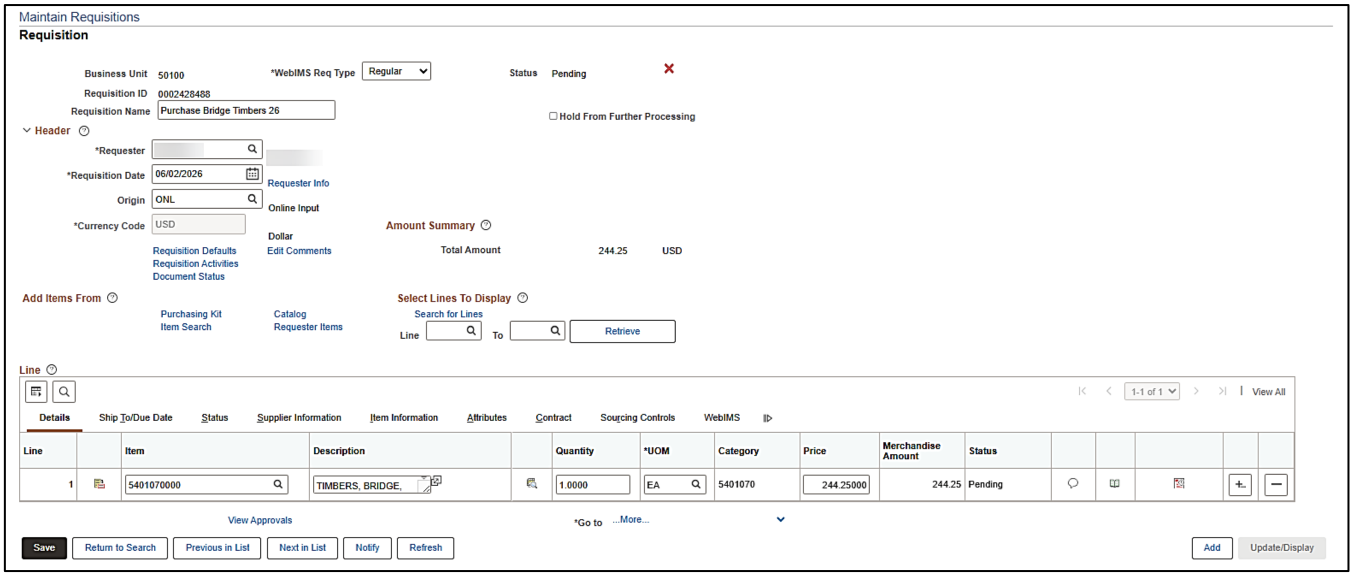
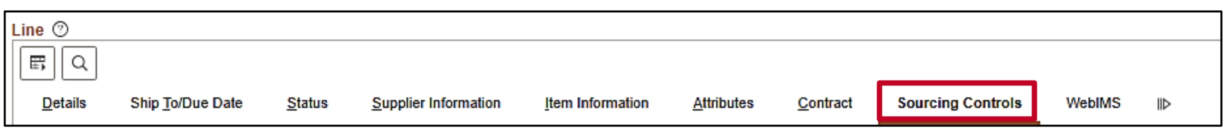
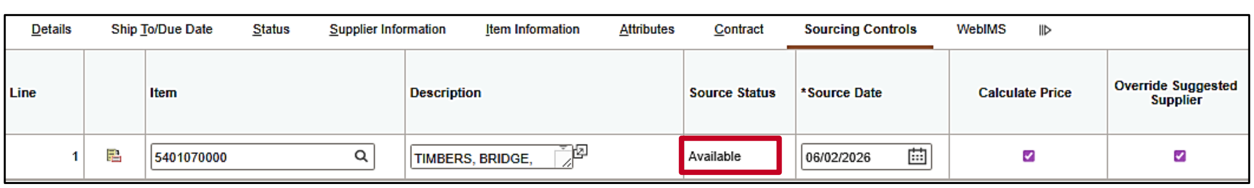
## Updating a Requisition

Note that Requisitions with the status of "Canceled" or "Complete" cannot be updated. To view these Requisitions, use the Reviewing Requisition Information section in this Job Aid.

| Step | Action |
|---|---|
| 1. | Navigate to the **Requisitions** page by clicking the **Procurement WorkCenter** tile.<br> |
| | For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**. |
| 2. | Use the following navigation in the WorkCenter: **Links > Requisitions > Add/Update Requisitions**<br>**Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles.<br> |
| | Users can also access the **Requisitions** page using the following navigation path:<br>**NavBar > Menu > Purchasing > Requisitions > Add/Update Requisitions** |

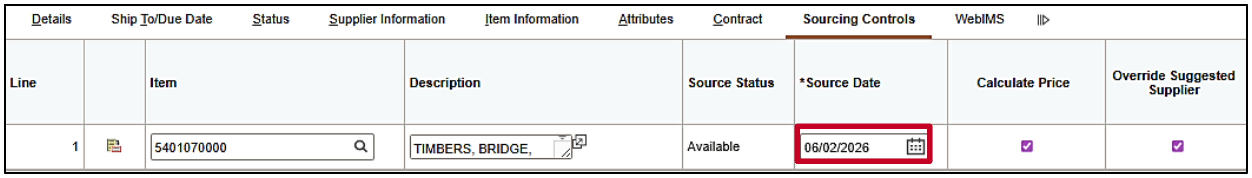
| Step | Action |
| --- | --- |
| | The **Requisitions Add a New Value** page displays.   |
| 3. | Click the **Find an Existing Value** button.   |
| | The **Requisitions Find an Existing Value Search** page displays.   |

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4.</td><td>Enter search criteria for an existing Requisition.<br><br>Requisition ID: begins with: 00024284<br>Requisition Status: = Pending Approval</td></tr>
<tr><td>5.</td><td>Click the Search button.<br><br>Search | Clear</td></tr>
<tr><td>i</td><td>For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>6.</td><td>Click the desired Drill in (>) link in the Search Results section.<br><br>Search Results<br>10 results - Business Unit "50100" Requisition ID "00024284" +1 more<br>1-10 of 10 | View All
<table>
<tr><th>Business Unit</th><th>Requisition ID</th><th>Requisition Name</th><th>Requisition Status</th><th>Origin</th><th>Requester</th><th>Requester Name</th><th>Hold From Further Processing</th><th></th></tr>
<tr><td>50100</td><td>0002428489</td><td>Purchase Bridge Timbers 26-1</td><td>Pending</td><td>ONL</td><td></td><td></td><td>N</td><td>></td></tr>
<tr><td>50100</td><td>0002428488</td><td>Purchase Bridge Timbers 26</td><td>Pending</td><td>ONL</td><td></td><td></td><td>N</td><td>></td></tr>
<tr><td>50100</td><td>0002428487</td><td>Job Aid Testing</td><td>Pending</td><td>ONL</td><td></td><td></td><td>N</td><td>></td></tr>
<tr><td>50100</td><td>0002428485</td><td>0002428485</td><td>Pending</td><td>ONL</td><td></td><td></td><td>N</td><td>></td></tr>
</table></td></tr>
</table>

| Step | Action |
|---|---|
| | The **Maintain Requisitions – Requisition** page displays.  |
| | A Requisition Line can only be edited if it has not already been sourced to a Purchase Order or Sourcing Event. |
| 7. | Click the **Sourcing Controls** tab.  |
| 8. | Review each Line's **Source Status**:<br>• “Available”: the Line has not been sourced and can be updated<br>• “Sourcing in Process”: sourcing has begun but the Purchase Order or Sourcing Event is not complete, and the Line cannot be updated<br>• “Sourcing Complete”: the Purchase Order or Sourcing Event is complete and the Line cannot be updated  |

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

The **Source Date** is the date the Line was either sourced or last updated and saved.




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

Make updates to the Requisition as appropriate. These may include:

- Modifying quantities
- Modifying Shipping information
- Adding new Line Items
- Removing Line Items
- Updating Schedule information
- Updating Distribution information
- Adding comments or attaching documents

For more information on each of these topics, see the Job Aid titled **PR342 Creating Regular Requisitions (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

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

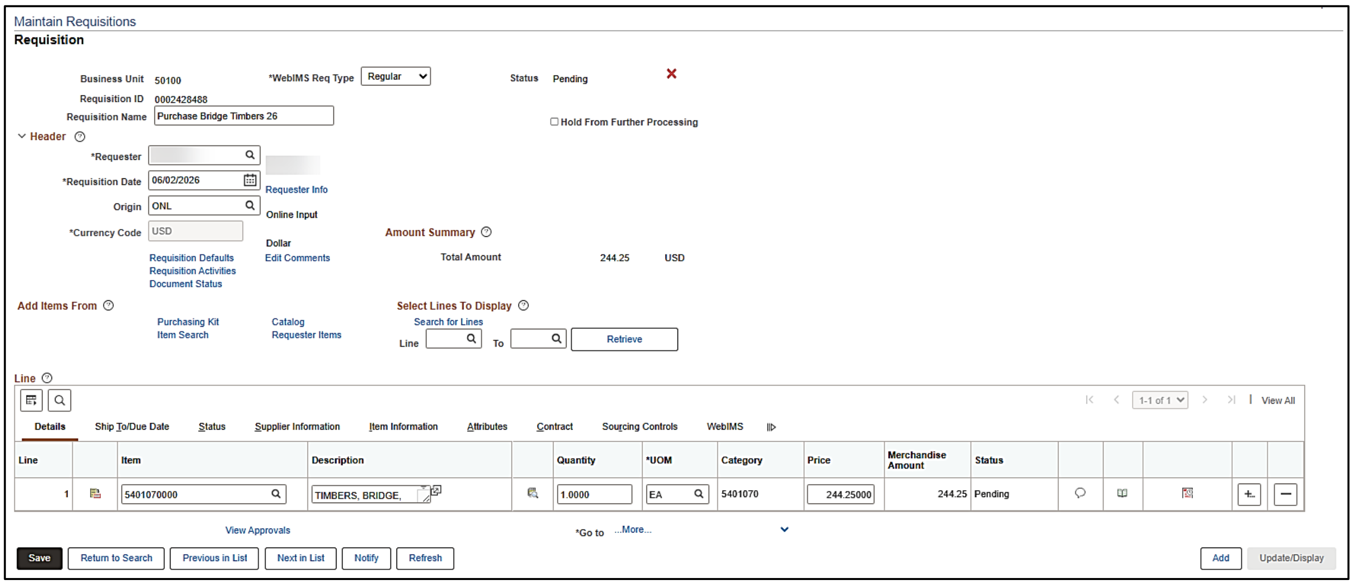
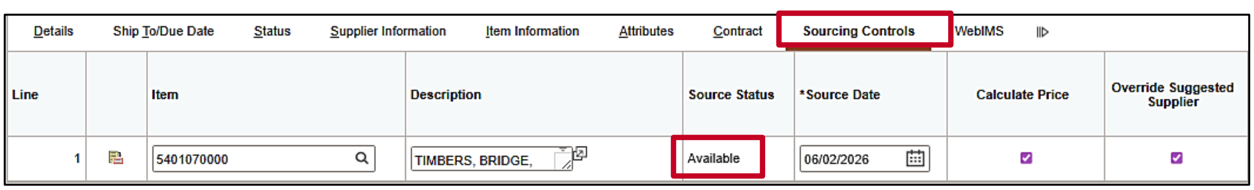
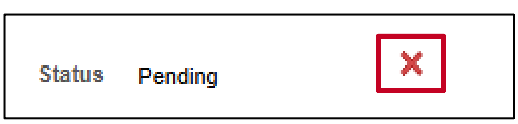
Click the **Save** button.

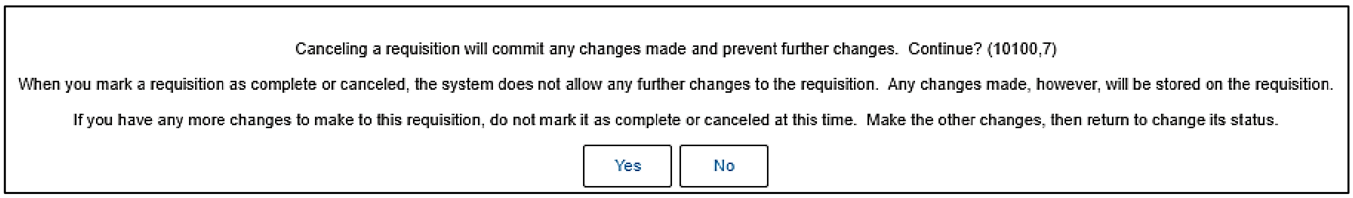
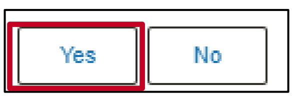
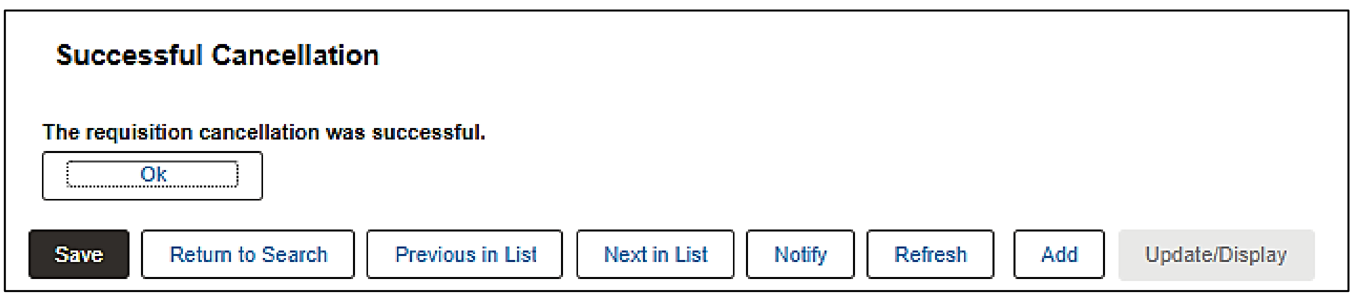
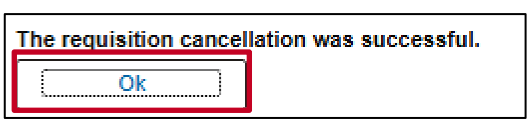

</td></tr>
<tr><td></td><td>

It is possible to make changes even if the Requisition has been approved. However, increasing the price or quantity may trigger the Requisition approval workflow.

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

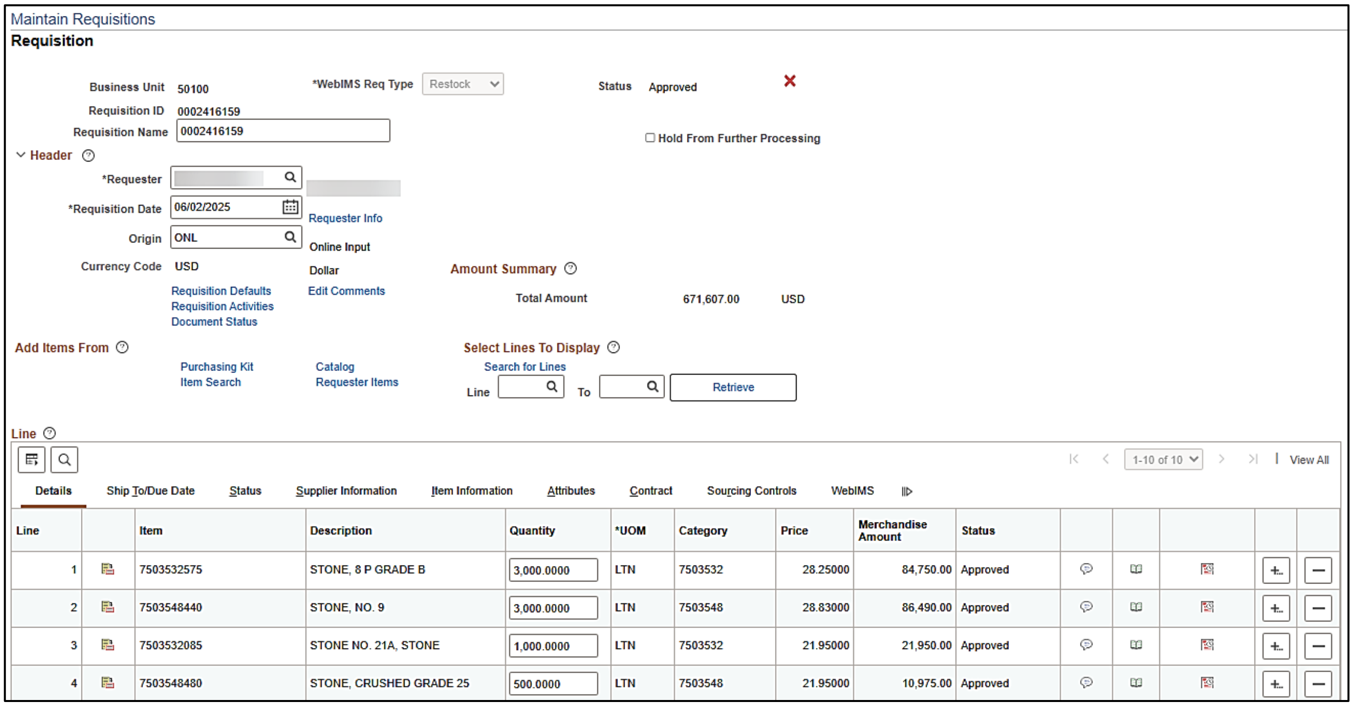
## Canceling a Requisition

| Step | Action |
|---|---|
| 1. | Open the Requisition to be canceled by following Steps 1-6 in the [Updating a Requisition](#) section in this job aid. |
| The **Maintain Requisitions – Requisition** page displays.  | |
| | A Requisition can be edited or canceled as long as it has not already been sourced to a Purchase Order or a Sourcing Event. Click the **Sourcing Controls** tab to see the **Source Status**.  |
| 2. | Click the **Cancel** (**X**) icon.  |

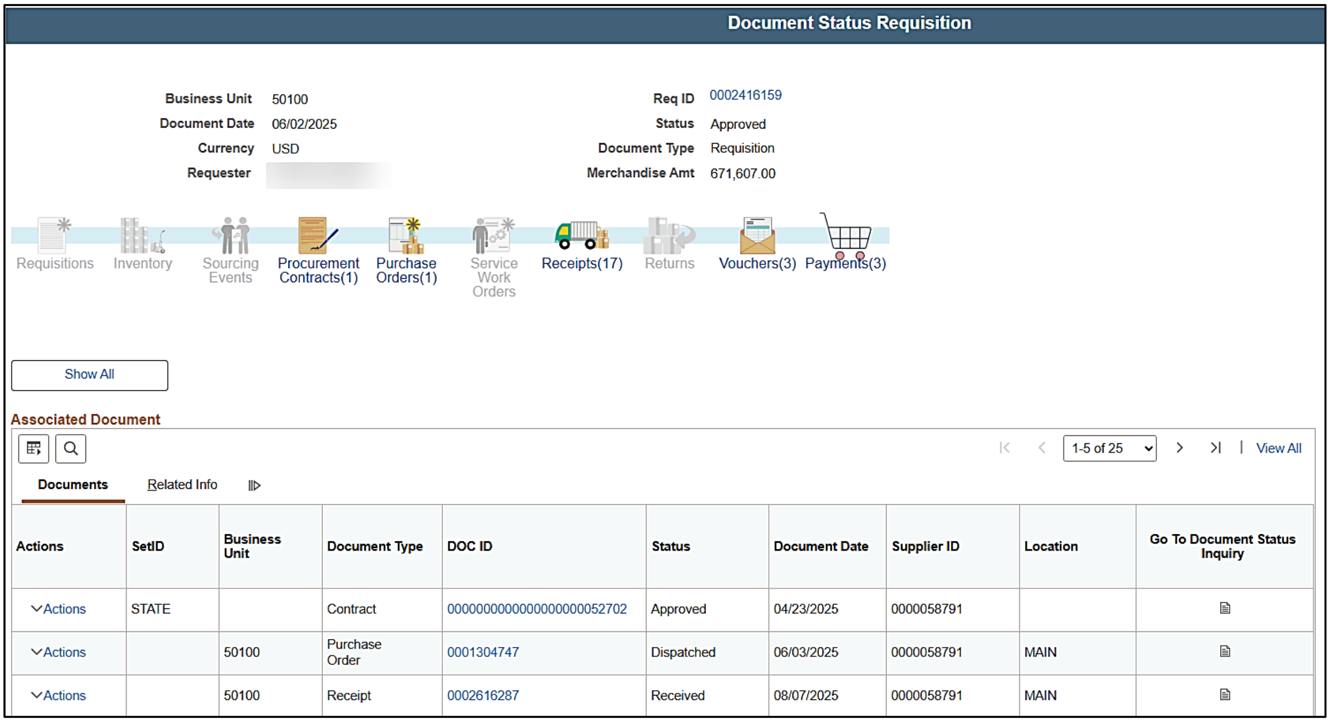
| Step | Action |
|---|---|
| | A Message window displays with the following text:<br>“Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)<br><br>When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.<br><br>If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.”<br> |
| 3. | Click the **Yes** button.<br> |
| | The **Successful Cancellation** notification page displays.<br> |
| 4. | Click the **OK** button.<br> |
| | Canceled Requisitions cannot be opened on the **Maintain Requisition** page. However, they can be viewed by navigating to the **Requisition Inquiry** page, using the following path: **Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions** |

## Reviewing Status and Approvals

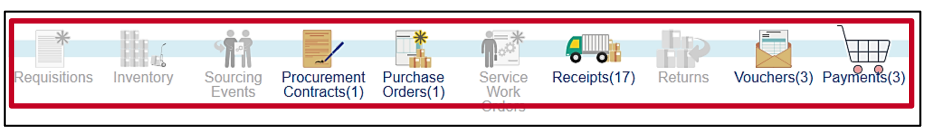
Requisitions can be reviewed in the **Purchasing** module. The status of an open Requisition and information on its approvals can be reviewed on the **Maintain Requisitions** page.

| Step | Action |
|---|---|
| 1. | Open the Requisition to be reviewed by following Steps 1-6 in the Updating a Requisition section in this job aid. |
| The **Maintain Requisitions – Requisition** page displays.  | |
| 2. | Click the **Document Status** link.  |

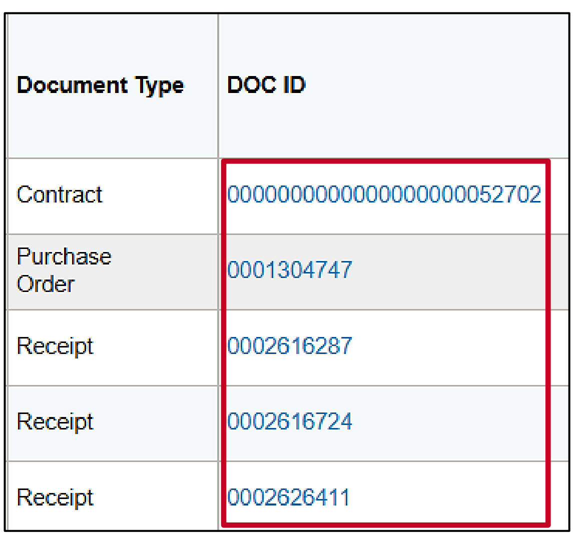
| Step | Action |
|---|---|
| | The **Document Status Requisition** page displays in a new browser tab. |



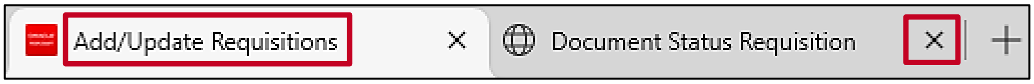

| Step | Action |
|---|---|
| 3. | Review the status of documents related to this Requisition. |



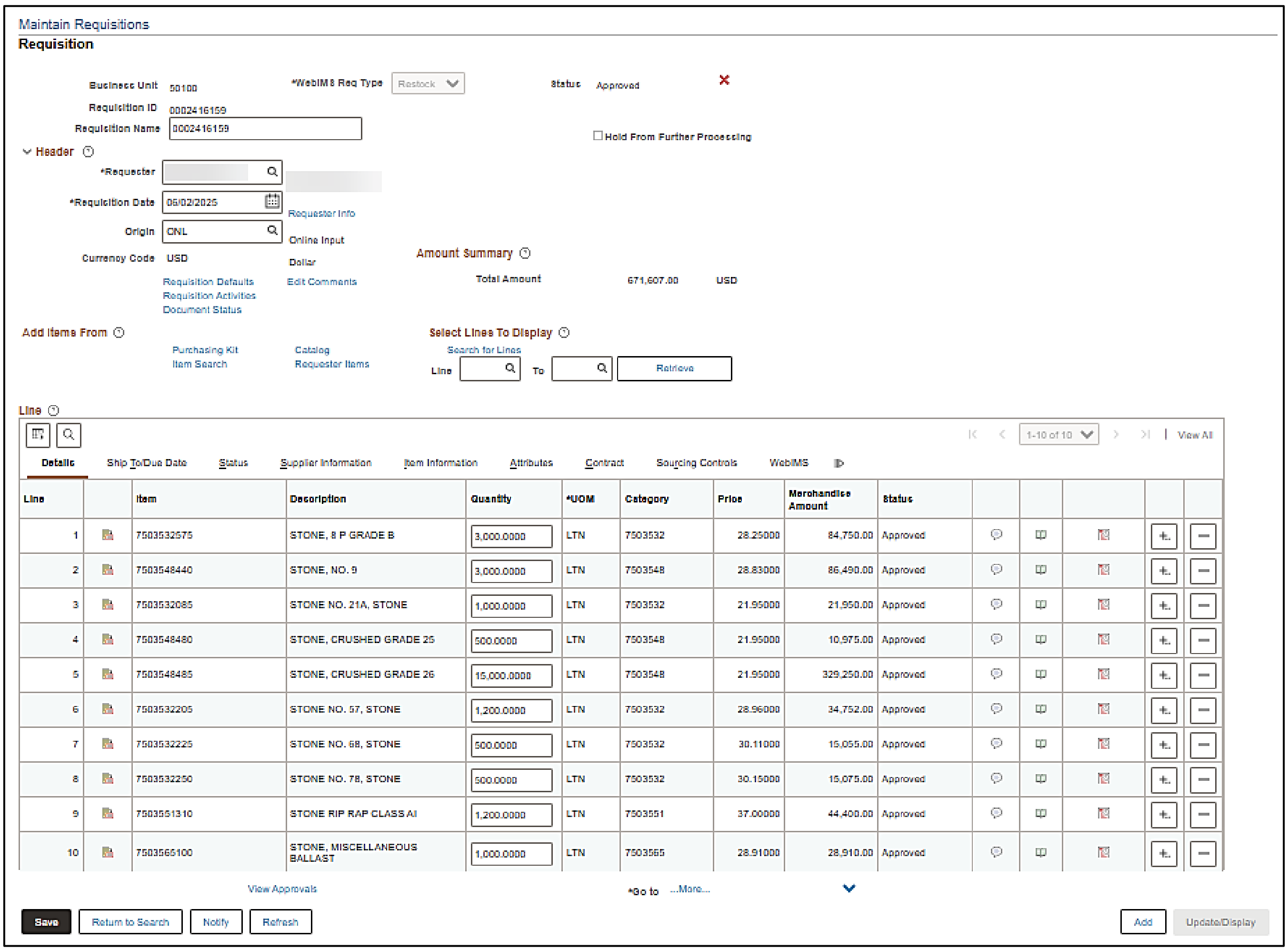

| Step | Action |
|---|---|
| 4. | Review associated documents by clicking the links in the **DOC ID** column. |



| Document Type | DOC ID |
|---|---|
| Contract | 0000000000000000000052702 |
| Purchase Order | 0001304747 |
| Receipt | 0002616287 |
| Receipt | 0002616724 |
| Receipt | 0002626411 |

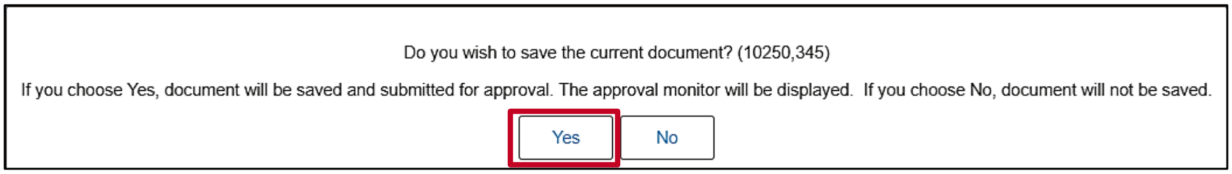
| Step | Action |
|---|---|
| 5. | Click the **Add/Update Requisitions** browser tab or close the **Document Status Requisition** browser tab to return to the **Requisitions** page.   |

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

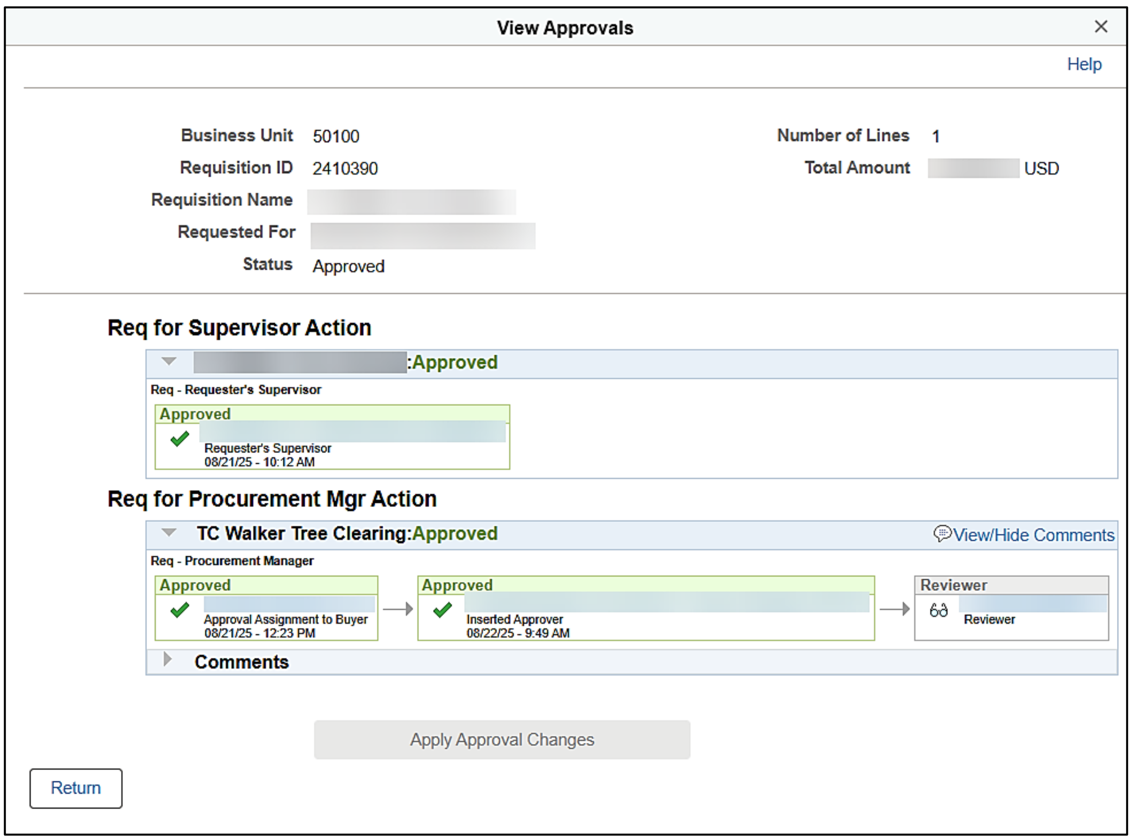



| Step | Action |
|---|---|
| 6. | Click the **View Approvals** link.   |

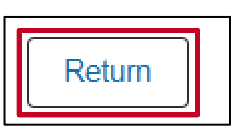
| Step | Action |
|---|---|
| 7. | Click the **Yes** button in the message pop-up window to save the Requisition and view the approval monitor. |

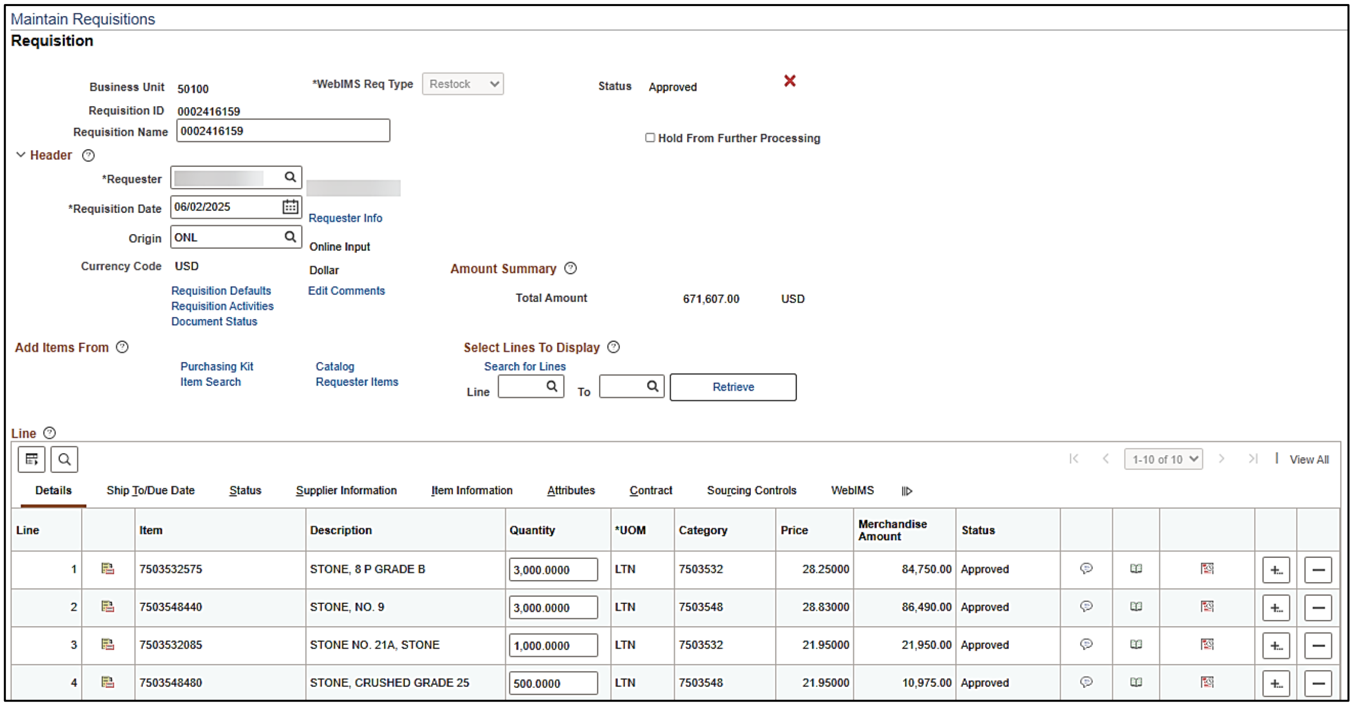
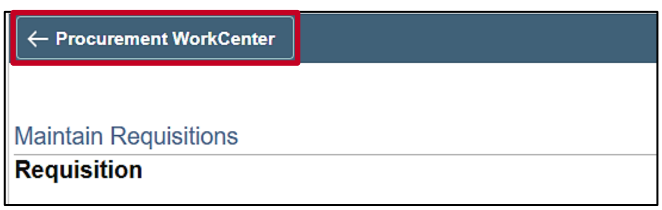



The **View Approvals** pop-up window displays.



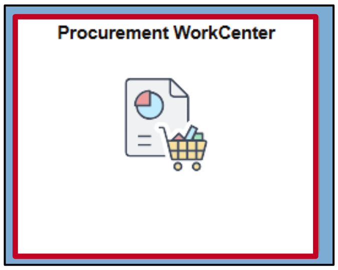
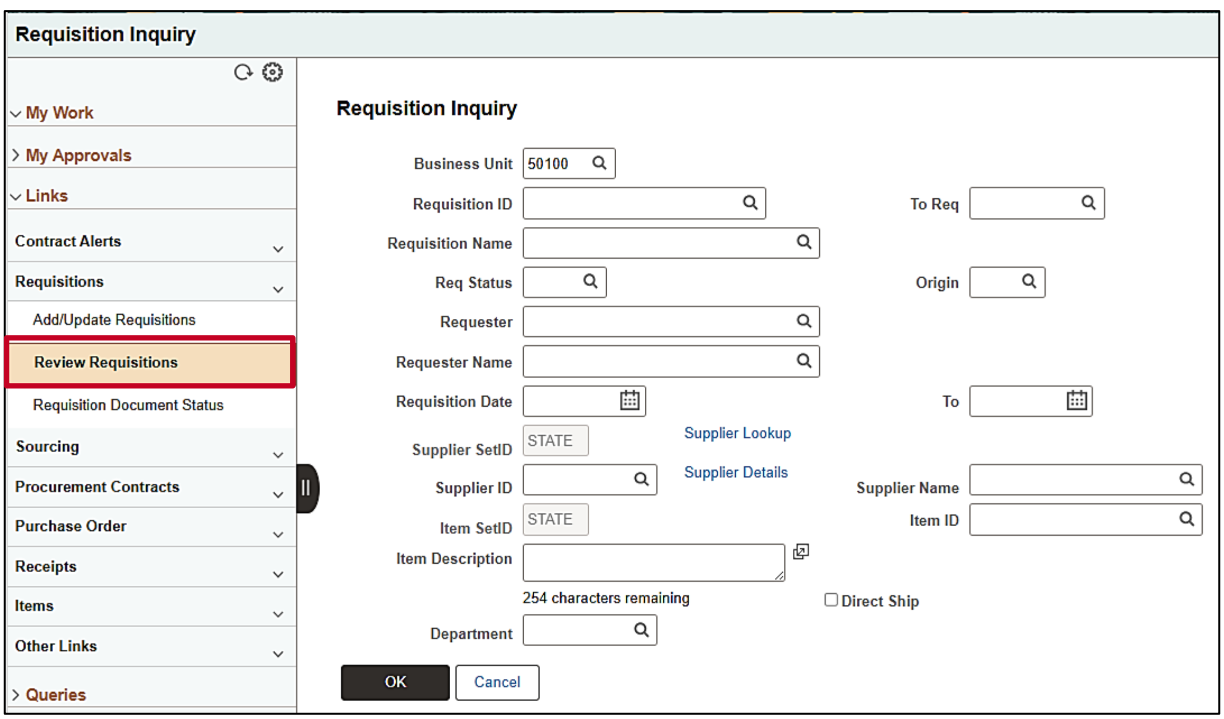

| Step | Action |
|---|---|
| 8. | Review the current state of approvals. |
| 9. | Click the **Return** button. |

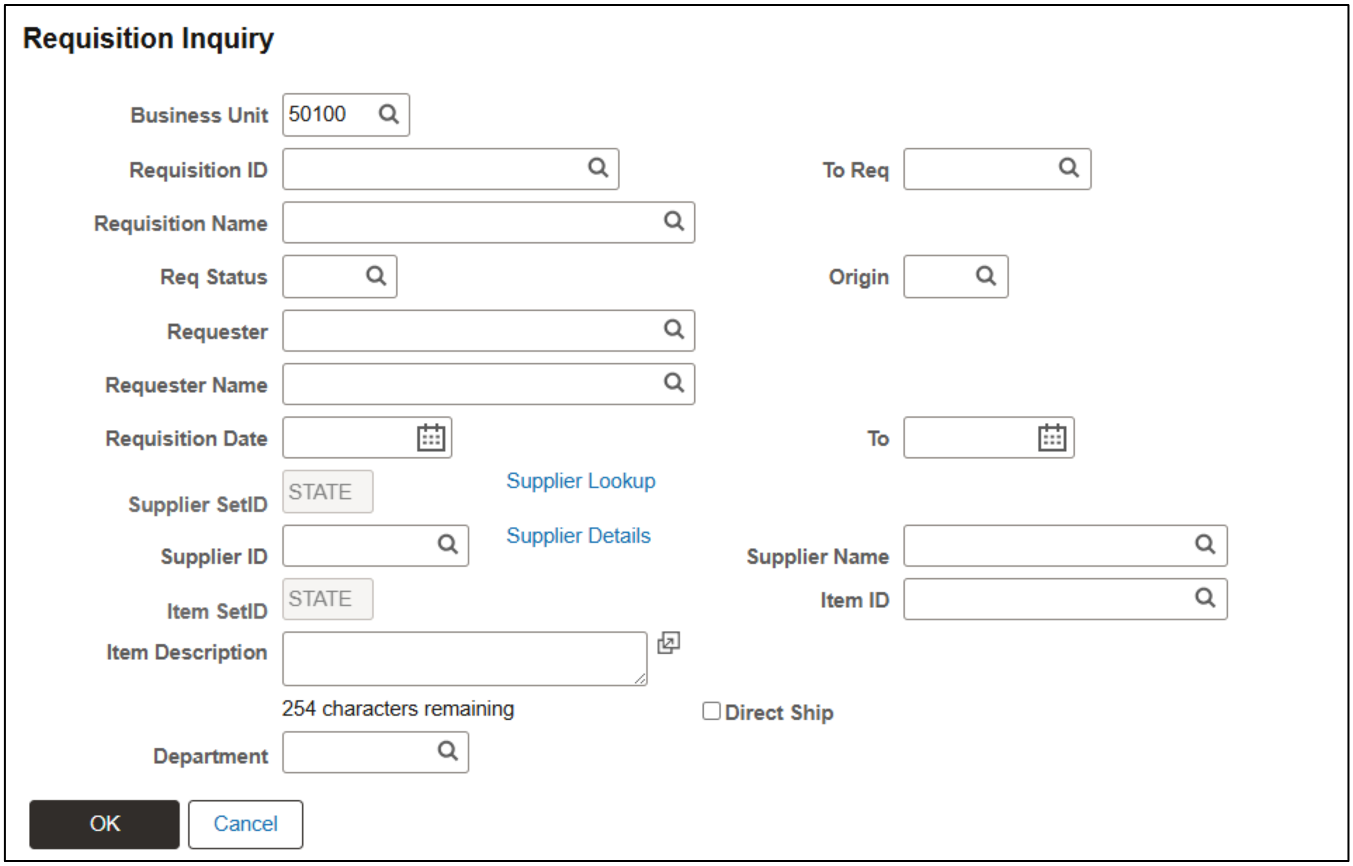
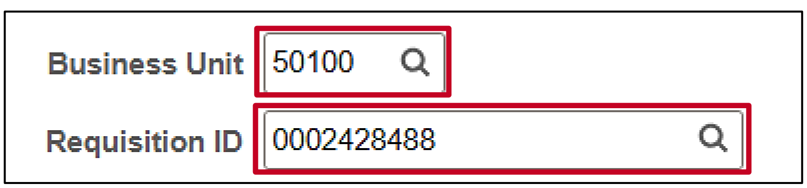
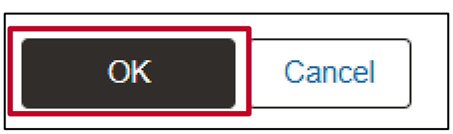


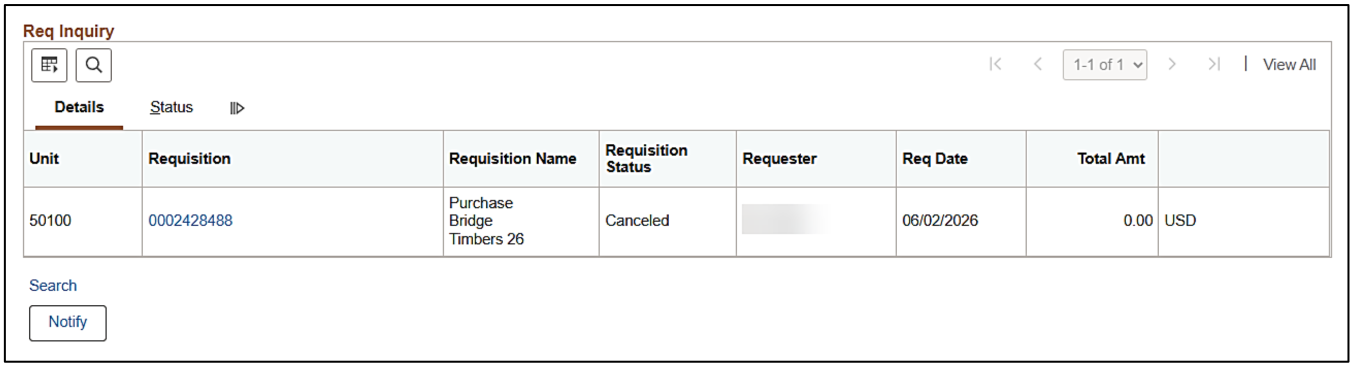
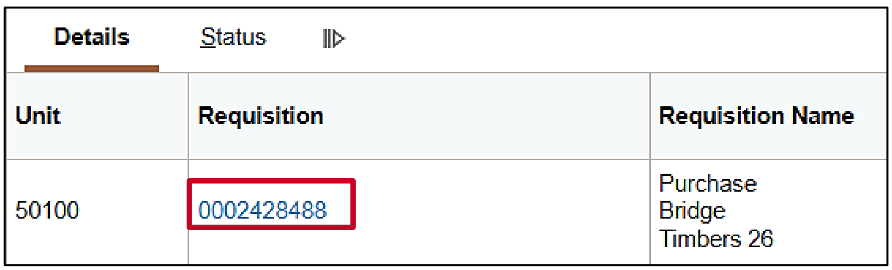
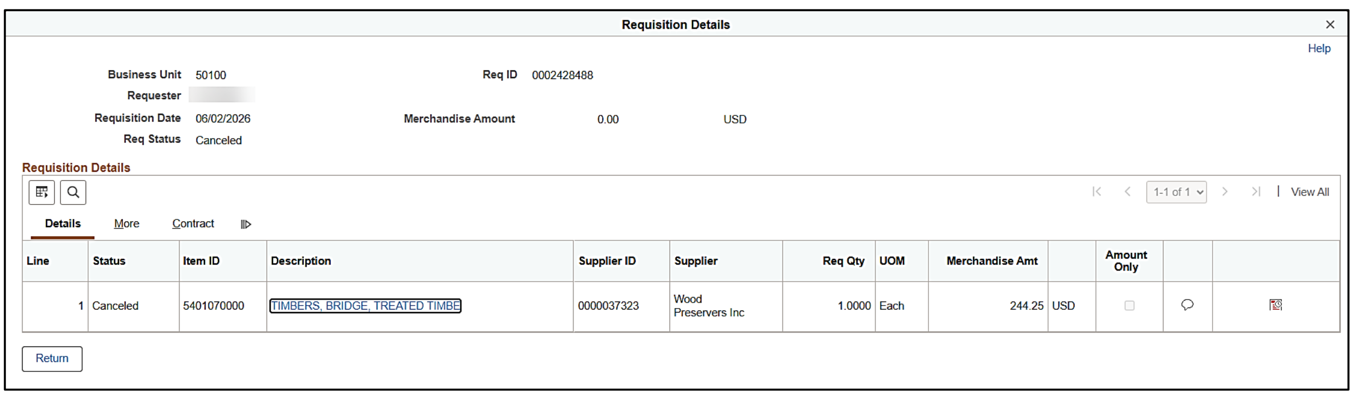
| Step | Action |
|---|---|
| | The Maintain Requisitions – Requisition page redisplays.  |
| 10. | Click the **Procurement WorkCenter** button in the upper-left corner of the page to return to the Procurement WorkCenter.  |

## Reviewing Requisition Information

A Requisition that does not need modifications, or is in a “Complete” or “Canceled” status, can be viewed using the **Review Requisition Information** page.

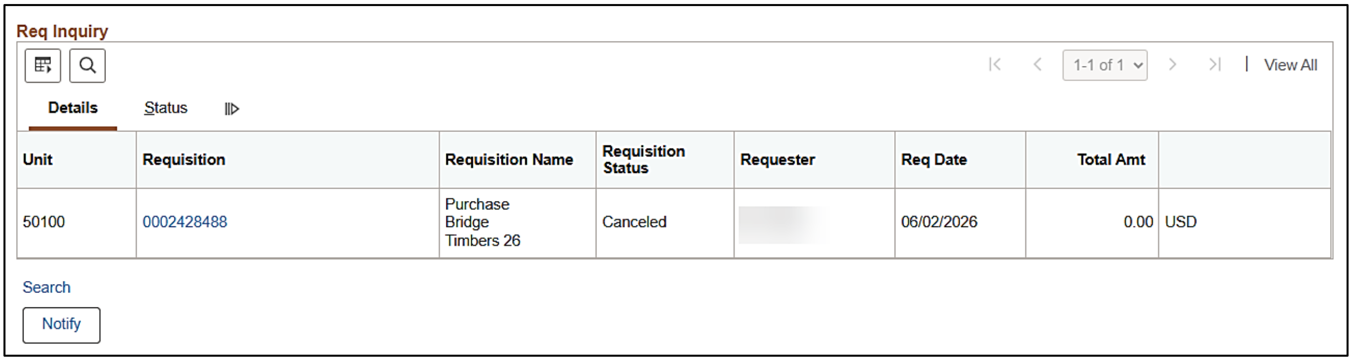
| Step | Action |
|---|---|
| 1. | Navigate to the **Requisition Inquiry** page by clicking the **Procurement WorkCenter** tile.<br><br> |
| | For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**. |
| 2. | Use the following navigation in the WorkCenter: **Links > Requisitions > Review Requisitions**<br>**Note**: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.<br><br> |
| | Users can also access the **Requisitions** page using the following navigation path:<br>**NavBar > Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions** |

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Requisition Inquiry page displays.<br>

</td></tr>
<tr><td>3.</td><td>Enter the applicable search criteria.<br>

</td></tr>
<tr><td>4.</td><td>Click the OK button.<br>

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

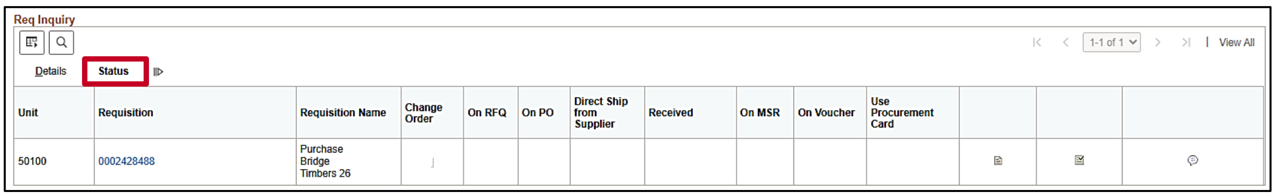
| Step | Action |
|---|---|
| | The **Req Inquiry** page displays.<br> |
| 5. | Click the **Requisition** link on the **Details** tab.<br> |
| | The **Requisition Details** page displays.<br> |
| 6. | Review the **Requisition Details** line items. |
| 7. | Click the **Return** button to return to the **Requisitions** page.<br> |

| Step | Action |
|---|---|

The **Requisitions** page displays.




| Step | Action |
|---|---|
| 8. | Click the **Status** tab. |




The **Status** tab contains links to lists of associated Purchase Orders, Receipts, and Vouchers, as well as the **Document Status**, **Approval Status**, and **Header Comments** icon links.

For example, clicking the link below the **On PO** header will direct the user to the **Requisition to Purchase Order List** which includes links to associated Purchase Orders. Clicking the link below the **Received** header will direct the user to the **Requisition Receipts List** which has links to related Receipts.