Procurement Approvals Overview

This Job Aid provides instructions on approving Requisitions, Purchase Orders, and Change Orders in the Cardinal Procurement module.

Strategic Sourcing Events do not have an approval workflow. However, Strategic Sourcing Buyers have the option of inviting collaborators to provide input on events or on bids. For more information on Strategic Sourcing collaboration, see the Job Aid titled **PR345 Strategic Sourcing Collaboration (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

A Purchasing Contracts Administrator sets a Procurement Contract Status to Approved to allow transactions to be processed against the Contract. There is no approval workflow associated with Contract approvals. However, this Job Aid does include instructions on addressing Procurement Contract Threshold Notifications. For more information on Procurement Contracts, see the Job Aid titled **PR348 Entering and Maintaining Procurement Contracts (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

For instructions on PCard/ISSP approvals, see the Job Aid titled **PR349 Reviewing and Approving PCard and ISSP Transactions (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process 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

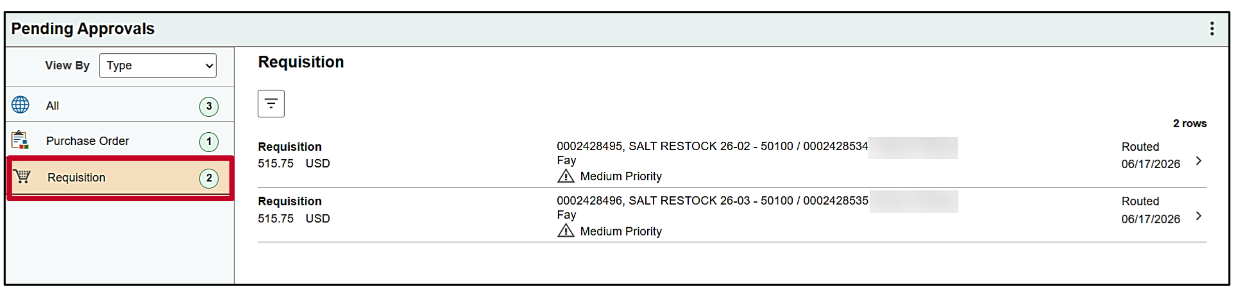
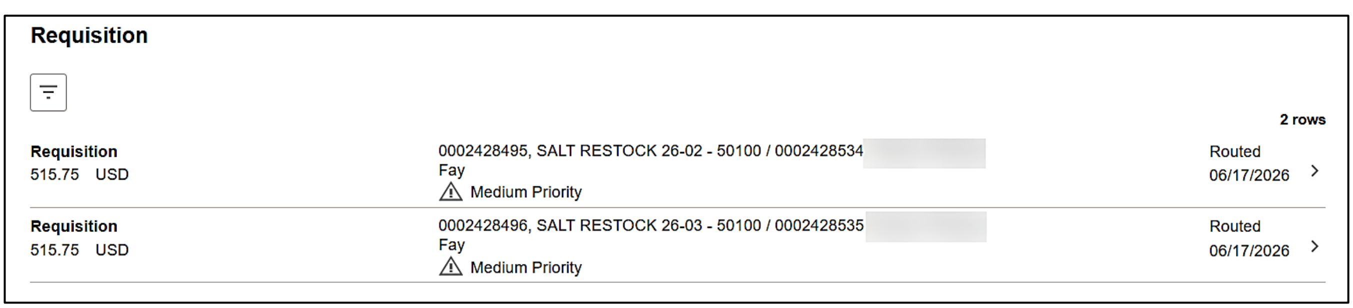
Revision Date	Summary of Changes
9/1/2026	Baseline.

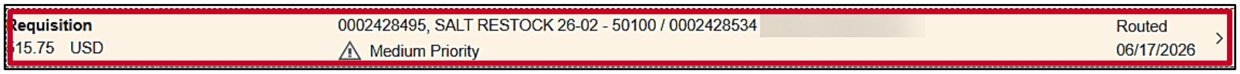
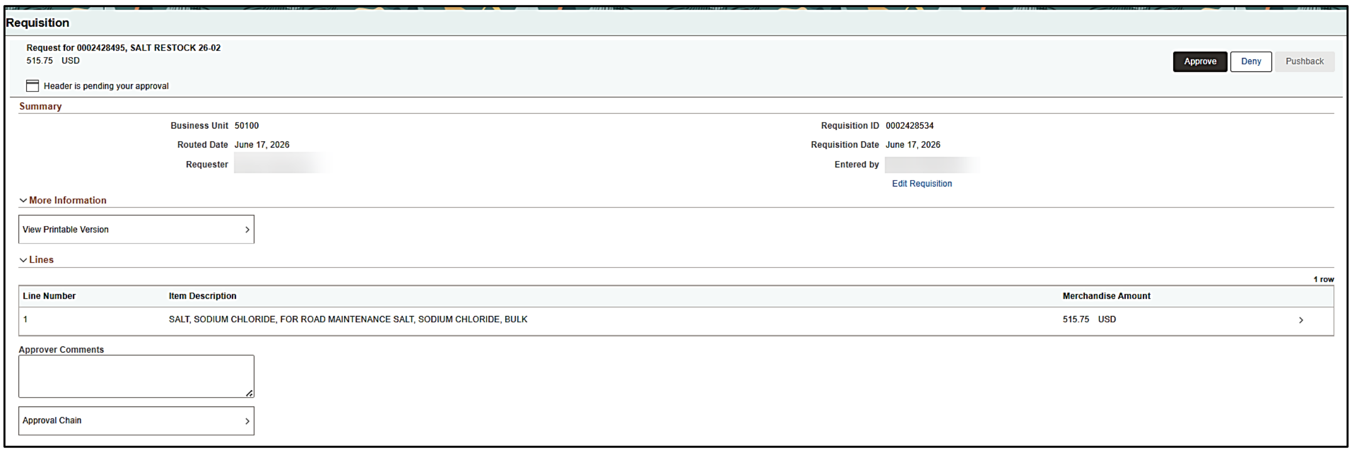
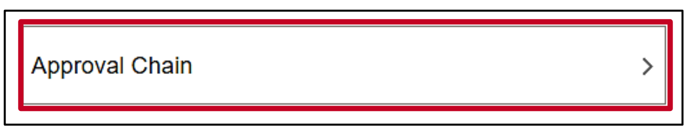
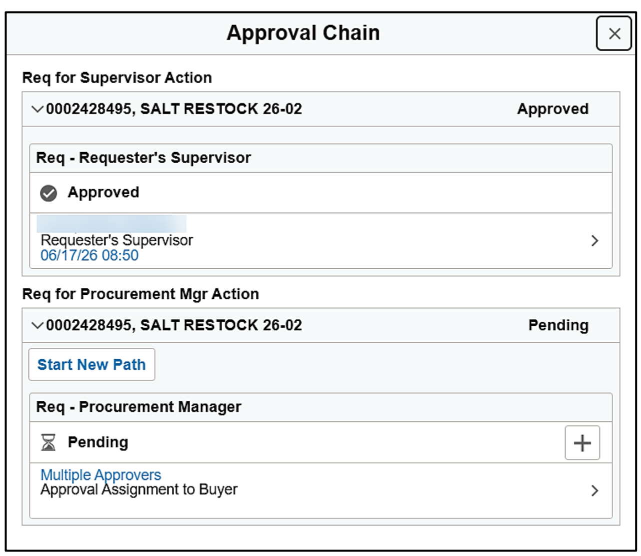
Approving Requisitions

A request for approval is triggered when a user submits a Requisition for approval. The approval steps for regular and WebIMS restock requisitions are the same.

Requisitions require two levels of approval: the requestor's Supervisor and the Procurement Manager. Approvers can add other relevant users as ad-hoc approvers or reviewers.

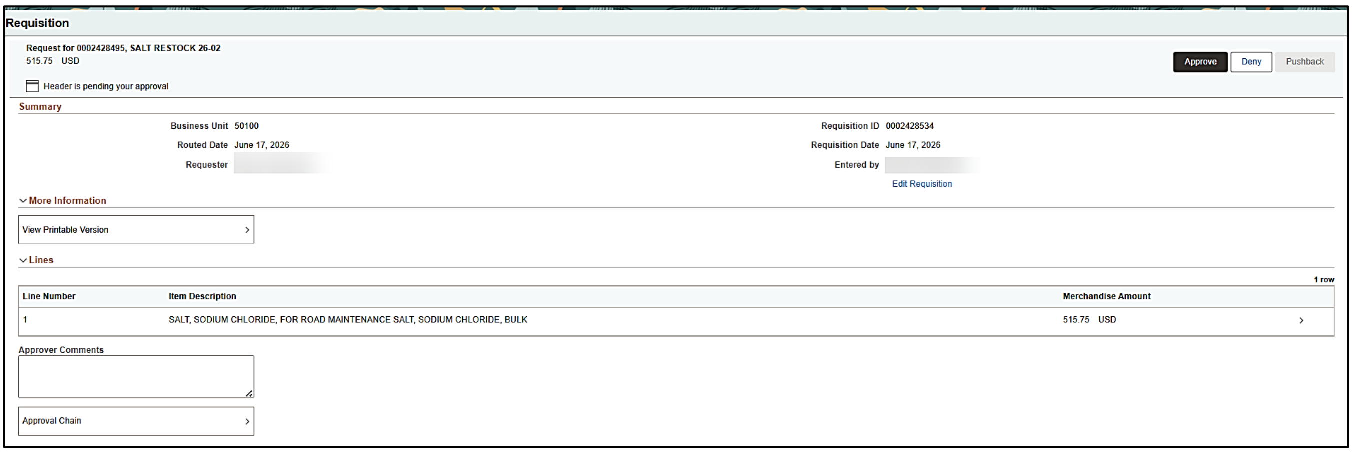
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Requisition Approvals page by clicking the Approvals tile.

</td></tr>
<tr><td></td><td>Users can also access the Requisition Approvals page using the following navigation path:
Procurement WorkCenter > Links > My Approvals > Pending Approvals > Requisition
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.</td></tr>
<tr><td>2.</td><td>Click the Requisition link in the Pending Approvals navigation panel.
Note: Access to the Approvals Tile is based on the user's Security roles.

</td></tr>
<tr><td colspan="2">The Requisition Approvals page displays.

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

Step	Action
3.	Click the applicable row to access the Requisition to be reviewed and approved. 
	The **Requisition** page displays. 
4.	Click the **Approval Chain** button to view and/or edit selected Approvers or Reviewers. 
	The **Approval Chain** page displays in a pop-up window. 
5.	View and/or edit the Approval Chain as needed.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>i</td><td>Procurement Managers (second level of approval) are required to insert the Buyer as a Reviewer before clicking the Approve button. Adding the Buyer as a Reviewer is a means to assign the Requisition to be worked on as a PO or Sourcing Event.</td></tr>
<tr><td>6.</td><td>Click the Close button (X) to return to the Requisition page.

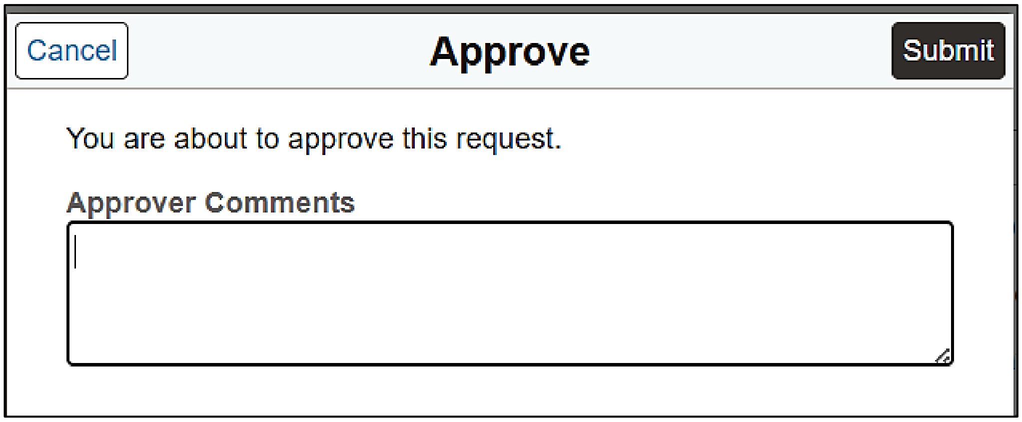
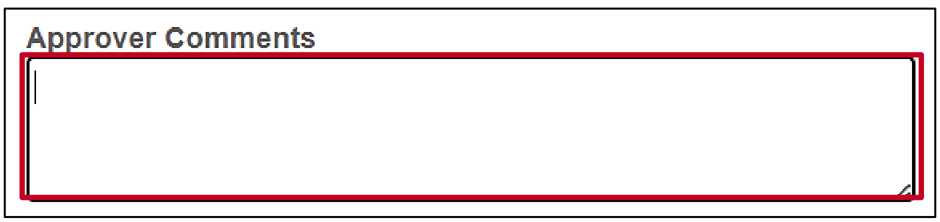
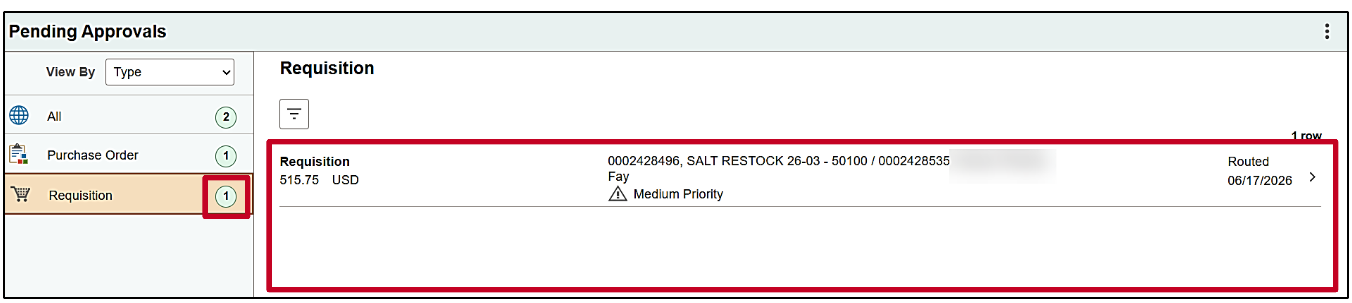
</td></tr>
<tr><td colspan="2">The Requisition page redisplays.



</td></tr>
<tr><td>7.</td><td>Click the Approve button to approve the Requisition.

</td></tr>
<tr><td>i</td><td>Click the Deny button to deny approval.

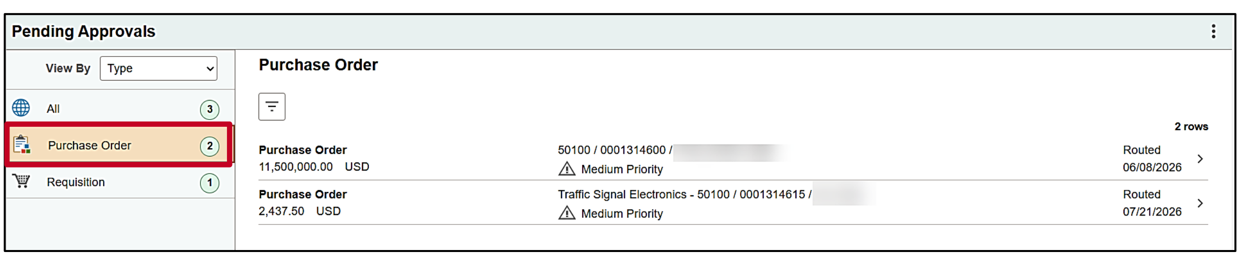
The Approver must add comments if denied. The user (Entered By) is notified by email and given the option to cancel or modify and re-submit. An email is also sent to the Requisition Requestor. If a denied requisition is subsequently edited, saved, and re-submitted, it will go through the approval process again.</td></tr>
</table>

Step	Action
The **Approve** page displays in a pop-up window. 	
8.	Enter comments in the **Approver Comments** field as applicable. 
9.	Click the **Submit** button. 
The **Pending Approvals** page redisplays without the approved Requisition listed, and the Requisition indicator goes down by one. 	

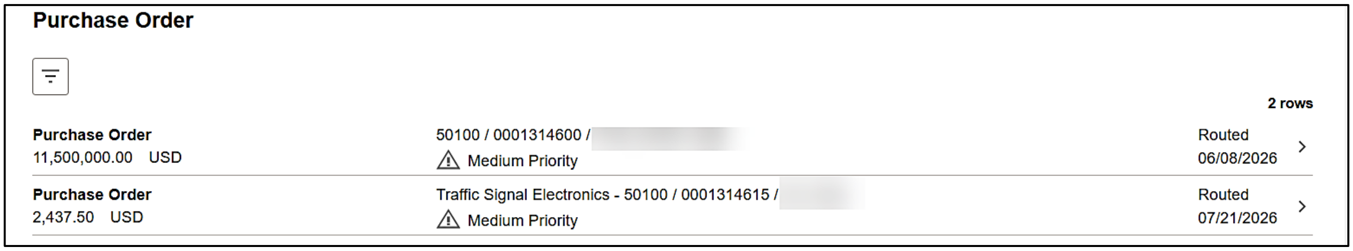
Approving Purchase Orders and Change Orders

A request for approval is triggered when a Buyer submits a Purchase Order (PO) or a Change Order (CO) for approval. Only POs/COs created directly in Cardinal require approval. POs created from a Requisition and POs/COs generated in SiteManager or eVA do not require approval in Cardinal, as these were approved in the source system.

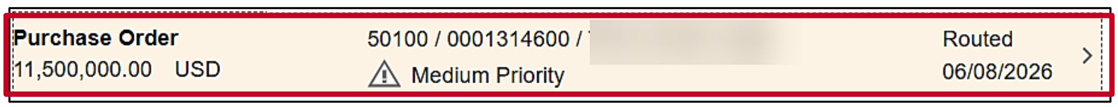
Cardinal sends each approver an email notification when a PO/CO is ready for approval. Cardinal also sends a reminder email to the Supervisor if the PO/CO is not worked within 24 hours. All POs/COs that require approval processing also appear on the approver's Pending Approvals list. If a PO is not approved within 48 hours, workflow routes the PO/CO to the Supervisor's Supervisor. The Supervisor's Supervisor can approve, deny, hold, or push back the PO/CO. The Buyer receives an email notification if the PO/CO is approved.

Step	Action
1.	Navigate to the **Purchase Order Approvals** page by clicking the **Approvals** tile. 
	Users can also access the **Purchase Order Approvals** page using the following navigation path: **Procurement WorkCenter > Links > My Approvals > Pending Approvals > Purchase Order** 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.	Click the **Purchase Order** link in the **Pending Approvals** navigation panel. **Note**: Access to the **Approvals Tile** is based on the user's Security roles. 

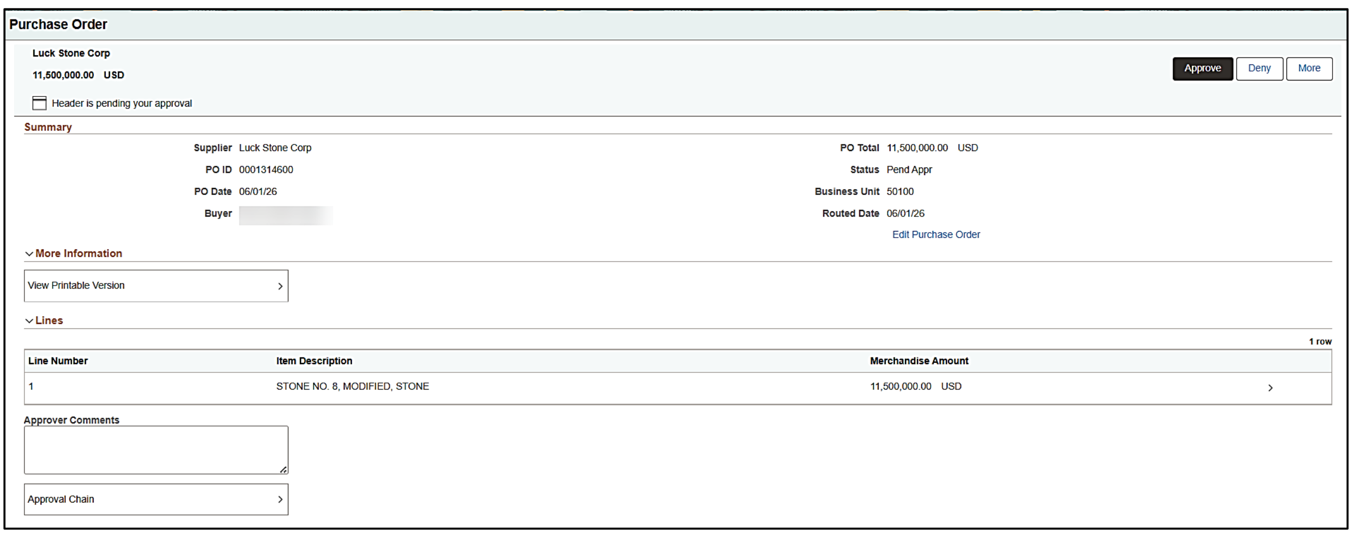
Step	Action
	The **Purchase Order Approvals** page displays.



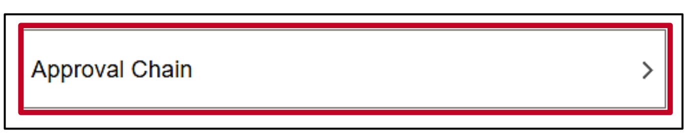
Step	Action
3.	Click the applicable row to access the Purchase Order to be reviewed and approved.

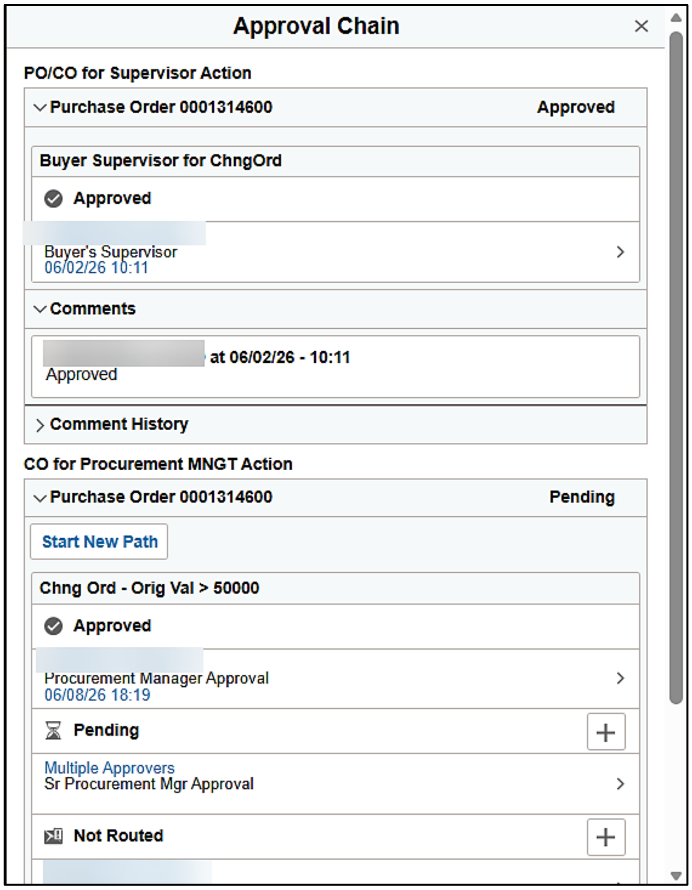
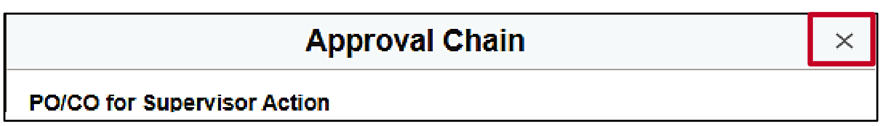


Step	Action
	The **Purchase Order** page displays.



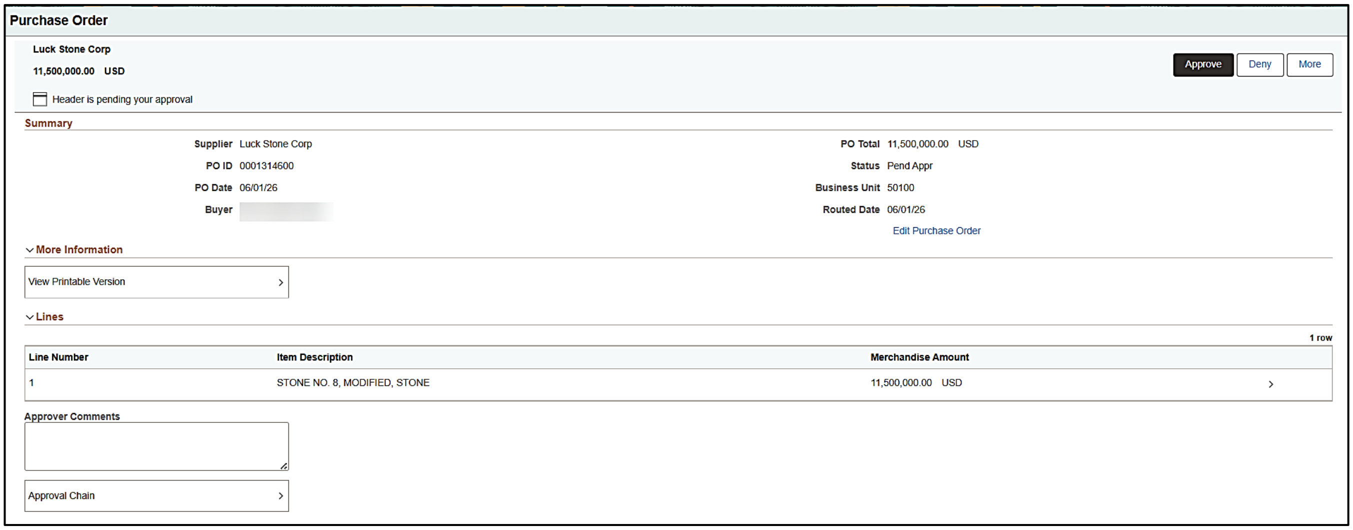
Step	Action
4.	Click the **Approval Chain** button to view and/or edit selected Approvers or Reviewers.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Approval Chain page displays in a pop-up window.

</td></tr>
<tr><td>5.</td><td>View and/or edit the Approval Chain as needed.</td></tr>
<tr><td>6.</td><td>Click the Close button (X) to return to the Requisition page.

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

Step	Action

The **Purchase Order** page redisplays.

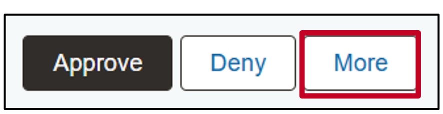


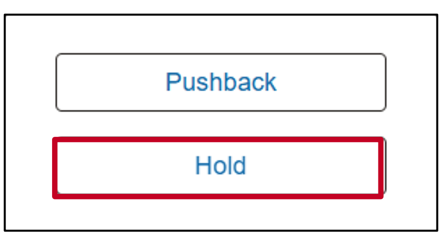
7. Click the **Approve** button to approve the Purchase Order.

Click the **Deny** button to deny approval.

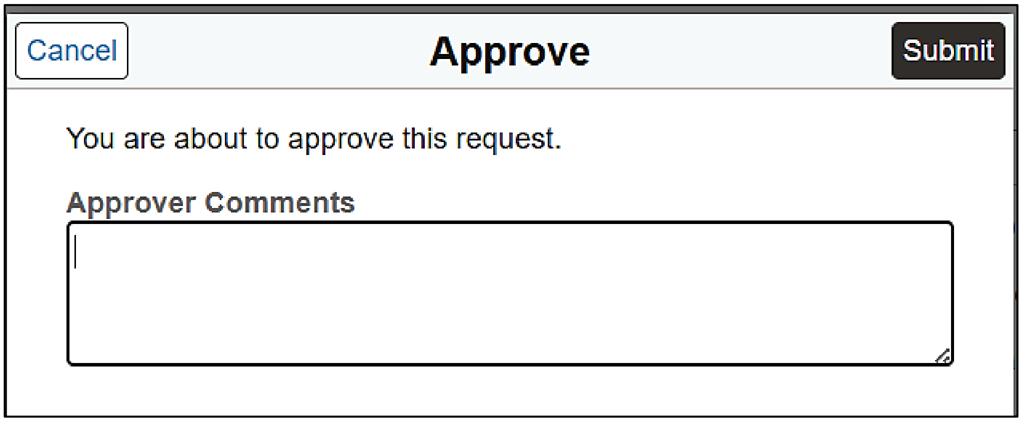
The Approver must add comments if denied. The user (Entered By) is notified by email and given the option to cancel or modify and re-submit. An email is also sent to the PO Requestor. If a denied PO is subsequently edited, saved, and re-submitted, it will go through the approval process again.

Click the **More** button and then the **Hold** button to put the PO on hold. Placing it on hold reserves it for later action. The hold feature prevents other approvers from taking action on the PO approval. The PO approval will not time out while on hold.

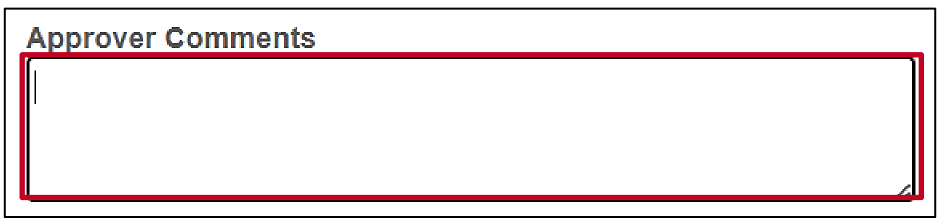




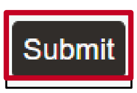
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The **Approve** page displays in a pop-up window.



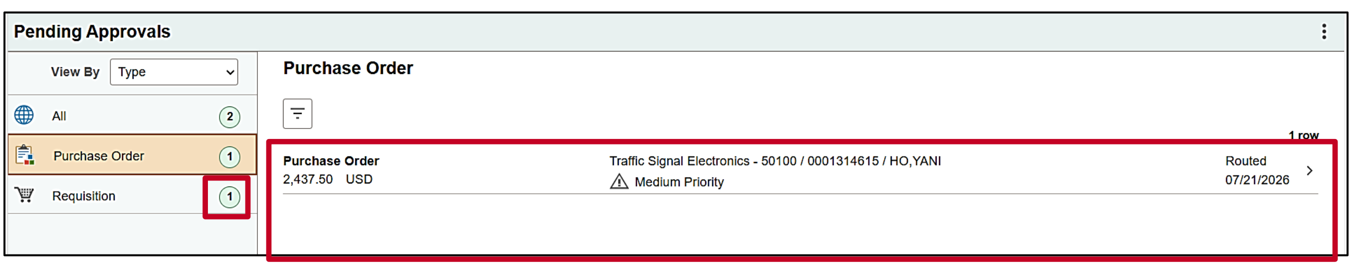
</td></tr>
<tr><td>8.</td><td>Enter comments in the **Approver Comments** field as applicable.



</td></tr>
<tr><td>9.</td><td>Click the **Submit** button.



</td></tr>
<tr><td colspan="2">The **Pending Approvals** page redisplays without the approved Purchase Order listed, and the Purchase Order indicator goes down by one.



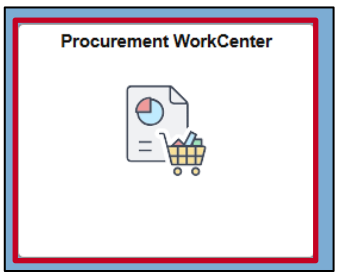
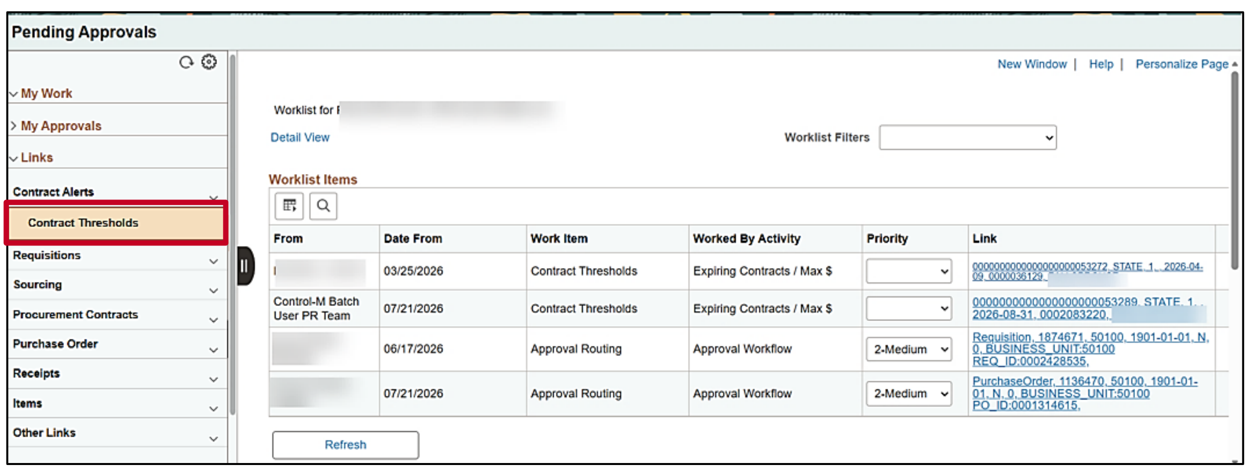
</td></tr>
</table>

Step	Action
	POs that have Change Orders attached to them go through a specific approval routing that depends on the difference between the originally approved PO amount and the Change Order amount, or if a line was added. One Level Routing for PO Change Order Approvals: • Adding a line to a PO will require Supervisor approval • Changes < 25% do not need Supervisor approval • Changes > 25% will escalate to the Supervisor for approval • Changes > 25% or $50,000 (whichever is greater) to a PO with an original value > $50,000 will escalate to the ASD Director for Approval Four Level Routing: Change Orders route to the Supervisor, Procurement Manager, Senior Procurement Manager, and Administrative Services Division (ASD) Director when the: • Original PO value is between $50,000 and $199,999.99 and the change amount is equal to or greater than $50,000. (Original PO ≥ $50,000 and < $200,000 and change amount ≥ $50,000) • Original PO value is equal to or greater than $200,000 and the change is equal to or greater than 25% of the original PO value. (Original PO ≥ 200,000 and the change is ≥ 25%) Procurement Managers (second level), Senior Procurement Managers (third level), and ASD Directors (fourth level) are part of a pooled approvers list. A Change Order that requires approval at the second, third, and fourth level of approval is directed to all of the approvers in that pool for each respective level of approval. Any approver in the pool can take action on the Change Order; the Change Order appears on all of their approval lists. When one of the approvers completes an action (e.g., approve, deny) on the Change Order, it is removed from all of the approvers' queues on that level. If none of these conditions are met, no routing or approvals are required for the Change Order.

Addressing Procurement Contract Threshold Notifications

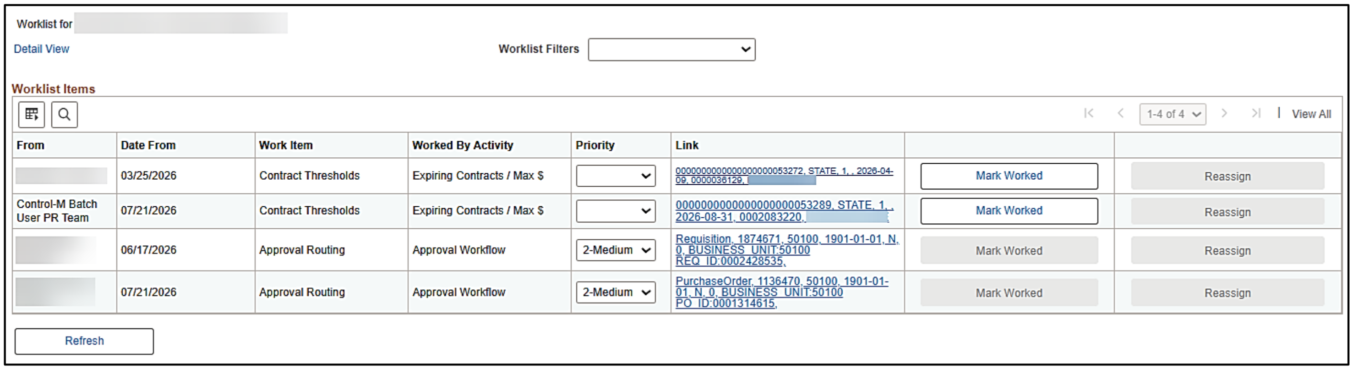
Users who are added to a threshold notification for a Procurement Contract are notified by email when a Procurement Contract is nearing expiration, renewal, or contract maximum. These Contracts can then be addressed as appropriate on the **Contract Thresholds** page in the **Procurement WorkCenter**.

For more information on Procurement Contracts, see the Job Aid titled **PR348 Entering and Maintaining Procurement Contracts (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Contract Thresholds page by clicking the Procurement WorkCenter tile.

</td></tr>
<tr><td></td><td>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.</td></tr>
<tr><td>2.</td><td>Use the following navigation in the WorkCenter: Links > Contract Alerts > Contract Thresholds
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.

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

Step	Action

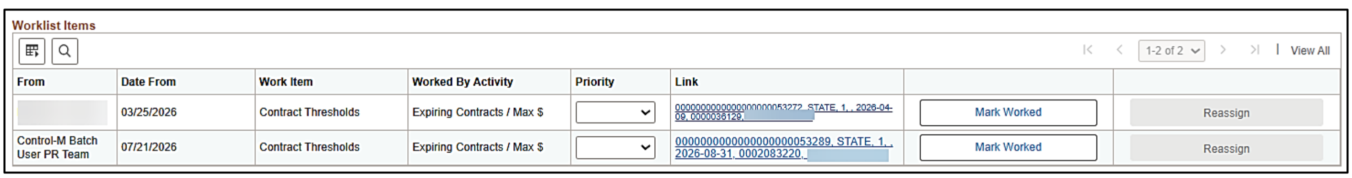
The **Contract Threshold** page displays.



From	Date From	Work Item	Worked By Activity	Priority	Link		
	03/25/2026	Contract Thresholds	Expiring Contracts / Max $		000000000000000000000053272, STATE, 1, , 2026-04-09, 0000036129,	Mark Worked	Reassign
Control-M Batch User PR Team	07/21/2026	Contract Thresholds	Expiring Contracts / Max $		000000000000000000000053289, STATE, 1, , 2026-08-31, 0002083220,	Mark Worked	Reassign
	06/17/2026	Approval Routing	Approval Workflow	2-Medium	Requisition, 1874671, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 REQ_ID:0002428535,	Mark Worked	Reassign
	07/21/2026	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1136470, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001314615,	Mark Worked	Reassign

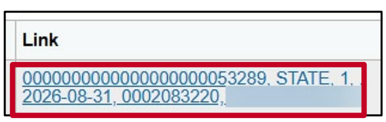
3. Click the **Worklist Filters** dropdown arrow and select “Contract Thresholds”.

The **Worklist Items** section is filtered to only show Contracts with Thresholds to address.



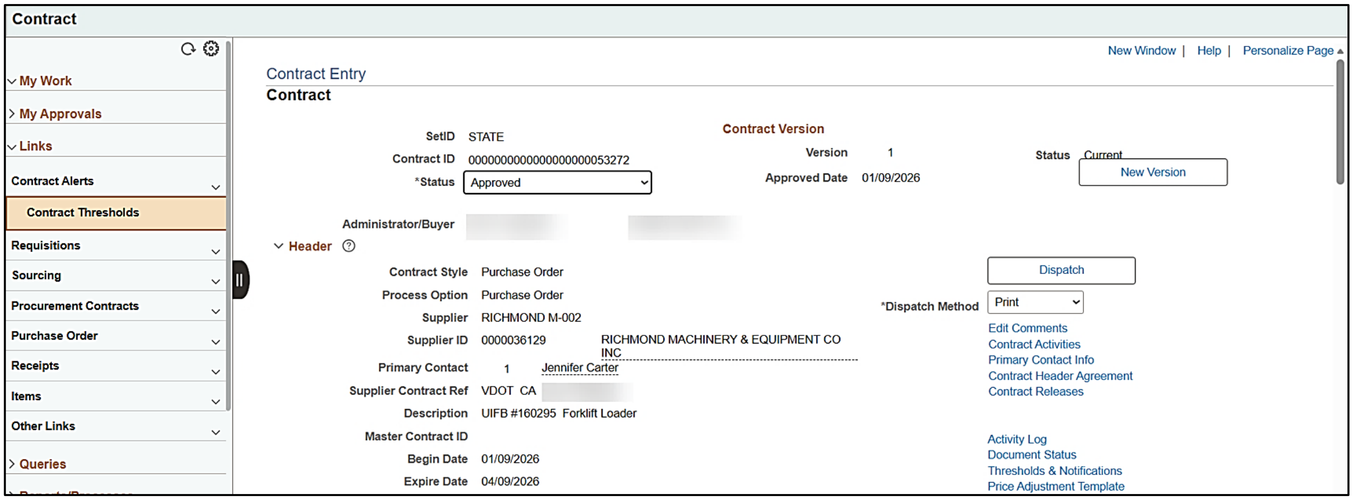
From	Date From	Work Item	Worked By Activity	Priority	Link		
	03/25/2026	Contract Thresholds	Expiring Contracts / Max $		000000000000000000000053272, STATE, 1, , 2026-04-09, 0000036129,	Mark Worked	Reassign
Control-M Batch User PR Team	07/21/2026	Contract Thresholds	Expiring Contracts / Max $		000000000000000000000053289, STATE, 1, , 2026-08-31, 0002083220,	Mark Worked	Reassign

4. Click the applicable Link to open the Contract and take appropriate action.

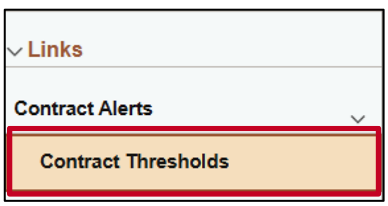


Step	Action

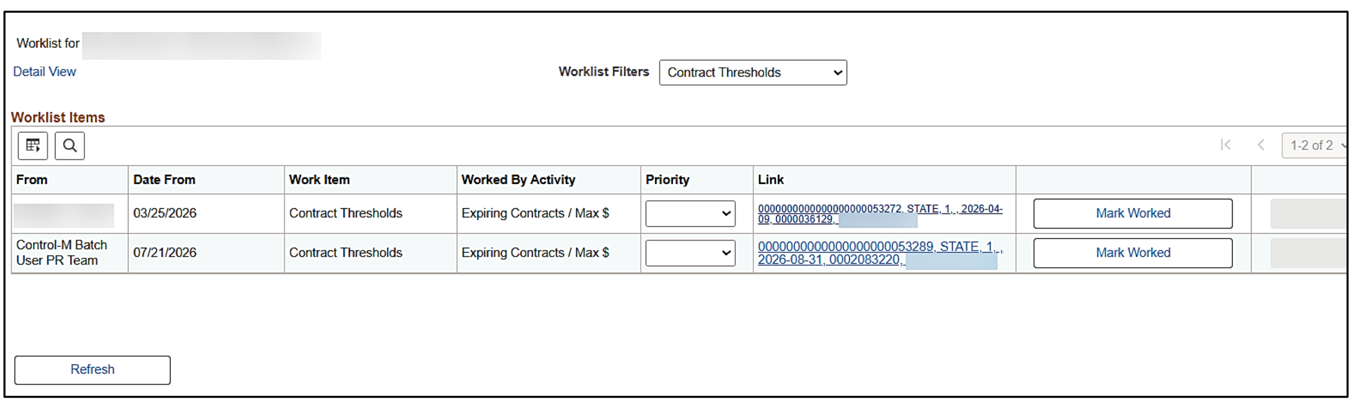
The **Contract Entry Contract** page displays.



Step	Action
5.	Take appropriate action.
6.	Click the **Contract Thresholds** link in the WorkCenter.



The **Contract Thresholds** page displays.



Step	Action
7.	Click the **Mark Worked** button for the applicable Contract.

Step	Action

The **Worklist Items** section refreshes and the worked Contract Thresholds work item is removed from the list.