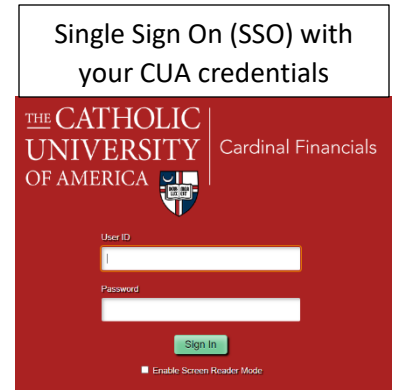
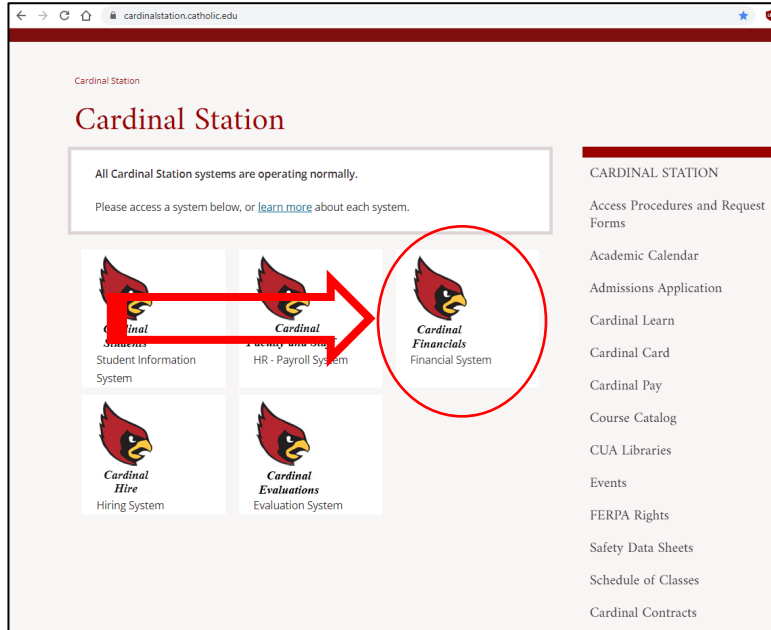
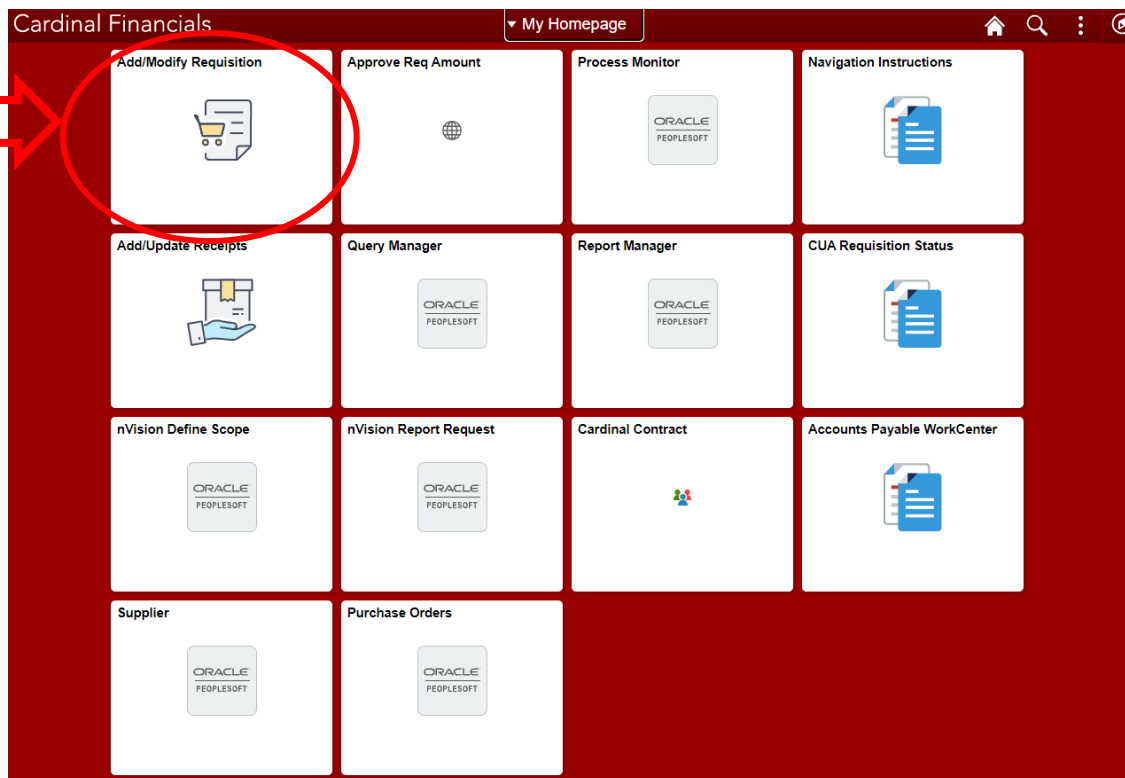


<h2 style="color: red; margin: 0;">Cardinal Financials:</h2>	<p>TITLE: Creating a Requisition in Cardinal Financials</p>
	<p>Prerequisite: Must have access to Cardinal Financials and be an active Requisitioner. Explanation: Creating a Requisition in Cardinal Financials (CF) is the first step in obtaining a Purchase Order to buy goods and services</p>

1. Login in to **Cardinal Financials (CF)** from Cardinal Station



2. From CF "My Homepage", click on "Add/Modify Requisition"



3. Click **"Add a New Value"** tab, then click the **"Add"** button.

The screenshot shows the 'Requisitions' form with the 'Add a New Value' tab selected. Below the tabs are input fields for 'Business Unit' (CUA) and 'Requisition ID' (NEXT). A red arrow points to the 'Add' button at the bottom of the form.

4. Enter required fields;
 - a. **Requisition Name**
 - b. **Description**
 - c. **Quantity**
 - d. **UOM** (Unit Of Measure) = **"EA"** (Each)
 - e. **Price**

The screenshot shows the 'Add/Update Requisitions' form. A red arrow points to the 'Requisition Name' field, which contains 'NEW Requisition Workflow'. A note box states: 'NOTE: The "Item" field is left blank. We do not use it in CF.' Below the form is a table with columns: Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, Status.

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1		Left handed smoke	1.0000	EA	EQP_SCIEN	1116	0.00	Open

5. Click the **"Supplier Information"** tab for the Line Item and enter the **"Supplier"** Number

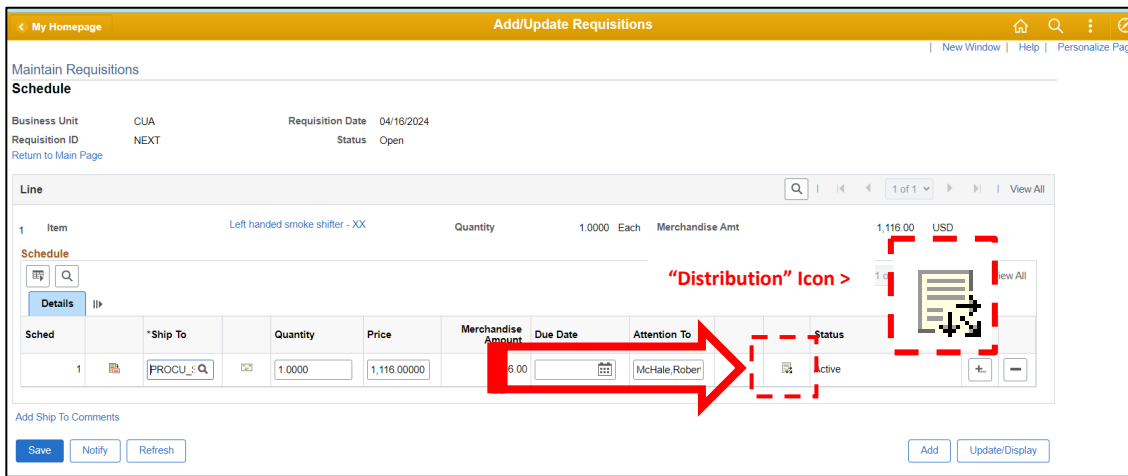
The screenshot shows the 'Supplier Information' tab selected. A red arrow points to the 'Supplier' field, which contains '0000051365'. A note box states: 'NOTE: "Supplier" must be entered for every Line Item entered in Req.' Below the form is a table with columns: Line, Item, Description, Supplier, Supplier Name, Location.

Line	Item	Description	Supplier	Supplier Name	Location
1		Left handed smoke	0000051365	Stericycle, Inc.	MAIN

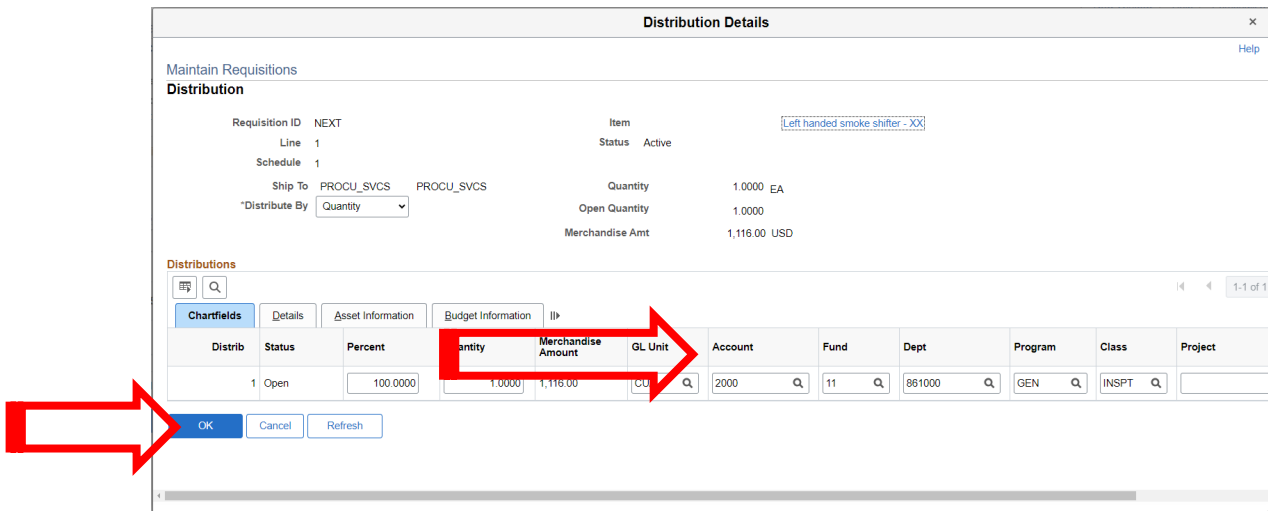
- Click the **"Details"** tab. Using the scroll bar found at the bottom of the page, scroll the screen to the far right revealing the right side of the Line Item. Click the **"Schedule"** icon



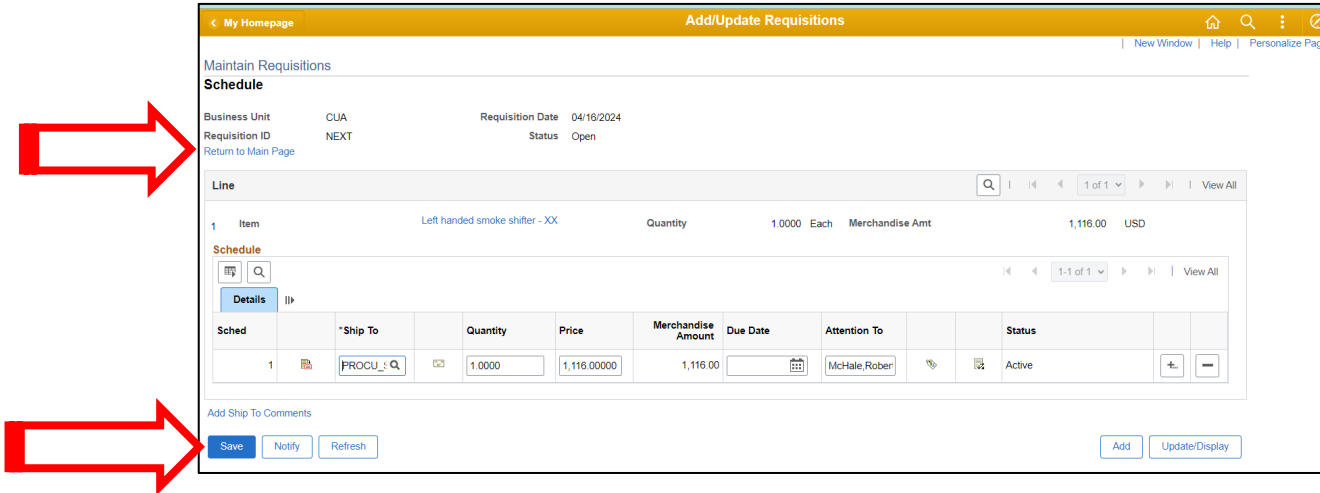
- In the Schedule Page click the **"Distribution"** icon.



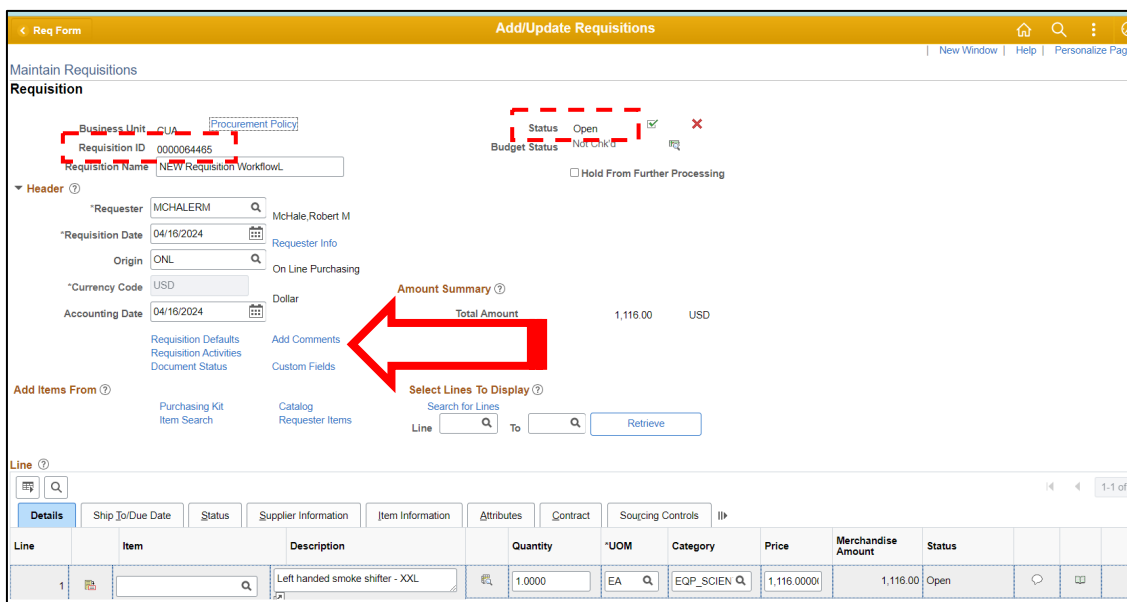
- In the Distribution Details page check chart of accounts for accuracy and make changes as needed. Click **"OK"** when complete to return to the Schedule Page.



9. In the Schedule Page, click "Save" to save your Requisition. Click "Return to Main Page"

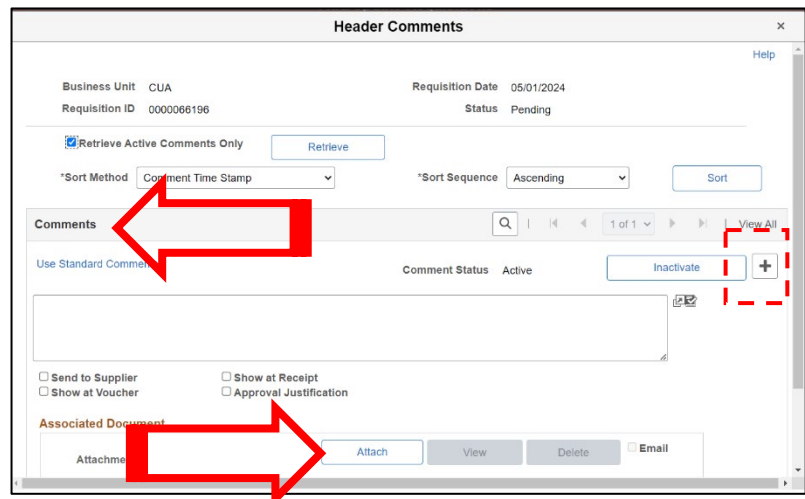


10. The "Requisition ID" number is assigned and the Requisition "Status" is "Open". In the Add/Update Requisitions Page, Click "Add Comments"



11. In the Header Comments Page, enter all needed information in the "Comments" field. Click "Attach" to upload supporting documentation;

- Supplier's quote or proposal (required)
- Competitive bids (if applicable)
- TechException Form (if applicable)



NOTE: To upload multiple documents, add additional Comments by clicking the "+". Only one document upload per Comment.

- Click the **"Budget Check"** icon to check the chart of accounts for enough funds. The Requisition **"Budget Status"** must be **"Valid"** to become a Purchase Order (PO).

The screenshot shows the 'Add/Update Requisitions' interface. The 'Budget Status' field is set to 'Valid', indicated by a red arrow. The 'Status' is 'Open'. The 'Amount Summary' shows a Total Amount of 1,116.00 USD. The table below shows one line item: 'Left handed smoke shifter - XXL' with a quantity of 1,000 and a price of 1,116.00000.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Left handed smoke shifter - XXL	1,000	EA	EQP_SCIEN	1,116.00000	1,116.00	Open

- Click the **"Submit for Approval"** icon. The Requisition is sent to all required Requisition Approvers based upon Chart of Accounts for each Line Item.

The screenshot shows the 'Add/Update Requisitions' interface. The 'Budget Status' field is now 'Valid', and the 'Submit for Approval' icon (a green checkmark in a square) is highlighted with a red dashed box. The 'Amount Summary' shows a Total Amount of 1,116.00 USD and a Pre-Encumbrance Balance of 1,116.00 USD. The table below shows one line item: 'Left handed smoke' with a quantity of 1,000 and a price of 1,116.00000.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Left handed smoke	1,000	EA	EQP_SCIEN	1,116.00000	1,116.00	Open

- Click **"View Approvals"** to track the approval process

The screenshot shows the 'View Approvals' button highlighted with a red dashed box. The table below shows one line item: 'Left handed smoke' with a quantity of 1,000 and a price of 1,116.00000, with the status changed to 'Pending'.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Left handed smoke	1,000	EA	EQP_SCIEN	1,116.00000	1,116.00	Pending