

SVSU Online Purchase Requisitions

11/03/06, Instructions by ITD Lab, x7471

Notes:

Initiating or editing a Purchase Requisition:

1. Open web browser to <http://cardinaldirect.svsu.edu/>
2. Click the Click Here to Enter Cardinal Direct... button.
3. Click Log In and login using your SVSU user name and password.
4. Click on Employee
5. Click on Purchase Requisition Maintenance.
6. Under the "Choose One" column, click the checkbox next to Add New to start a new requisition, or check the number of the requisition you would like to edit.
7. Click Submit



Step 2

Choose One	Requisition List
1 <input checked="" type="checkbox"/>	0000229 Best Buy, Matt Giddings, bldg. Wickes Hall, rm 216
2 <input type="checkbox"/>	Add New



[Step 6](#)

NOTE: There are four save options at the bottom of the requisition that allow you to Total the prices, Save the requisition, Finish the requisition and send it to approver, and Void. Each option has minimum requirements that must be completed before being able to use the option.

Required Fields for using the following options:

Total and Save: Adds Item Prices; returns total in bottom left column.

- Account Number (at least one account number must be listed)
- GL Percent (at least one percentage must be given - must add up to 100%)
- Line Item Quantity
- One Description
- Line Item Price

Save and Exit: Saves without submitting to Approver. Can access Req. at another time.

- At least one description

Mark as Finished: Saves Purchase Requisition and submits it to Approver

- Account Number (at least one account number must be listed)
- GL Percent (at least one percentage must be given - must add up to 100%)
- Deliver To
- Building/Room
- Contact/Extension
- Suggested Source
- Date Required
- Line Item Quantity
- One Description
- Line Item Price

Void Req: Purchase Requisition will be taken out of the system. Number cannot be reused

- No required fields

Total and Save:

The server will time out after 20 minutes. To avoid losing information, complete all required fields, and click total and save!

Save and Exit:

Use when long interruptions in entering order information will occur or if more information needs to be gathered.

Requisition No:
This is generated automatically when creating a new requisition.

Pct:
Percents must add up to 100%.

Account No:
Enter account number and object code. No need to type dashes or the final "--0"

Building/Room:
Use the drop-down list to find the correct building. Type the room number in the next box.

Comments:
Use this area to communicate information to purchasing. i.e. Fax Number

Notes to vendors should be entered in the description.

If sending a quote interoffice, make a note in comments. Be sure to write Req # on quote being sent!

Suggested Source:
If unsure, type "Unknown" in this box.

If previously used source, select the name from the drop-down list. Address will fill in when Total & Save is completed. The list is not all-inclusive.

If not in list, type vendor name in suggested source and enter Address 1 and CSZ.

UoM:
Choose Unit Measurement from drop-down list.

Description:
Type parts/unit into description. i.e. 50 pieces/box

Enter details here with no abbreviations. Must include **Brand, Part Number and Model Number.**

Tab to or click the next description line for descriptions that require more space.

Requisition No 0000229

Department Name

Object Codes

	* Account No	* Pct
1	11-145002-5456-0	100.000
2		
3		
4		
5		
6		
7		
8		
9		
10		

* Deliver To

* Building/Room

* Contact/Ext

Internal Comments

1	
2	
3	

* Suggested Source

Addr1

Addr2

CSZ

* Date Required (mm/dd/yyyy)

	* Qty	UoM	Part Number	* Description	* Unit Price	Extended Price
1	5.000	EA - EACH	19573	Cordless Mouse	39.99	199.95
2	5.000	EA - EACH	91537	Cordless Keyboard	59.67	298.35
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Total Requisition Amount: \$498.30

Total and Save

Save and Exit

Mark as Finished

Void Req

SUBMIT

Notes:

Marking the Purchase Requisition as Finished:

1. Make sure all required fields have the correct information.
2. Check the Mark as Finished Checkbox.
3. Click Submit.
 - A confirmation message within Cardinal Direct will appear stating “Your requisition has been forwarded. Click the menu button to return to the menu”
 - An Email will immediately be sent to the Initiator confirming details from the Requisition.

Example Email sent to Initiator:

From: purchasing@svsu.edu
To: initiator@svsu.edu
Subject: [REQ] Requisition #0000143 Details

Date of Request : 03/03/2005

Requisition # : 0000321
Department : ITC
Account(s) / Percent:

27-792036-5499-0 / 100.000

Deliver To : Deb Newton

Building : Curtis Hall

Room : 155

Contact : Deb Newton

Extension : 7468

Comment #1 : 1-800-664-6671

Suggested Vendor : Pureland Supply

Address 1 : P.O. Box 59

Address 2 :

City : Bridgeport

State : NJ

Zip : 08014

Date Required :

Item #1

Quantity : 2

Unit of Measure: BX

Part Number :

Description : ENX Lamp (box of 10)

: 360 Watts, 82 Volts

Price : \$58.00

Subtotal : \$116.00

Item #2

Quantity : 1

Unit of Measure:

Part Number :

Description : Shipping & Handling

Price : \$14.00

Subtotal : \$14.00

Total : \$130.00

- Reminder Emails are sent on Monday mornings to the Initiators regarding requisitions that are one week old or older and who they are waiting approval from.
- Emails to Approvers or assigned Proxy are sent twice daily; 10:00am and 3:00pm. At these times the system checks if there are any requisitions waiting to be approved. In such a case, the approver will be sent a reminder Email. Specific Requisition numbers are not listed in these Emails.

Example Email sent to Approver:

To: approver@svsu.edu

From: purchasing@svsu.edu

Subject: [REQ] You have approvals waiting.

You have requisitions waiting your approval. Please access Cardinal Direct through the link below to view the approvals you have waiting.

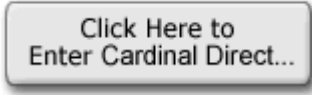
<https://aisws2.svsu.edu/servlet/com.datatel.server.servlets.webadvisor.WebAdvisor?MENU=em&MNEMONIC=XWRA&APPLICATION=CF&>

Thank you.

Purchasing

Approving/Declining a Purchase Requisition:

1. Open web browser to <http://cardinaldirect.svsu.edu/>
2. Choose **Click Here to Enter Cardinal Direct.**
3. Click Log In and login using your SVSU user name and password.
4. Click on Employee
5. Click on **Purchase Requisition Approval**



Step 2

6. Under the "Choose One" column, **click the checkbox next to Initiator Name, Dollar Amount, etc.** that you would like to approve.
7. Click **Submit**

User Name:

Password:

SUBMIT

Step 5

8. This will display a summary of the requisition.
9. Click in the appropriate checkbox;
Approve - The requisition will be sent to the next approver. *The final approver is purchasing.*
Decline - The requisition will be returned to initiator's box for editing. Enter reasons for the decline in the spaces provided - these will be Emailed to the initiator.
Cancel Action - No change will be made to the requisition and it will remain in the Requisition List.
10. Click **Submit** - A confirmation message will appear stating either that you have accepted or declined the requisition.

View Overrides

Choose One	Requisition List
<input type="checkbox"/>	Patrick C Samolewski 0000229 Matthew C Giddings \$498.30

SUBMIT

Step 6

Requisition No 0000229

Department Name: TS

Account No	pct
11-145002-5456-0	100.000

Deliver To: Matt Giddings
 Building/Room: Wickes Hall 216
 Initiator: Giddings, Matthew C
 Contact/Ext: Matt Giddings 7040

Suggested Source: Best Buy
 4460 Bay Rd
 Saginaw MI 48603

Date Needed: 02/28/2005

	Qty	UoM	Part Number	Description	Unit Price	Extended Price
1	5.000	EA - EACH	19573	Cordless Mouse	39.99	199.95
2	5.000	EA - EACH	91537	Cordless Keyboard	59.67	298.35
Total Requisition Amount: \$498.30						

Approve Requisition
 Decline Requisition
 Cancel Action

Decline Reason
1 <input type="text"/>
2 <input type="text"/>
3 <input type="text"/>

SUBMIT

Step 9