About Procurement Items

Procurement Items and Categories in Cardinal are synonymous with the National Institute of Governmental Purchasing (NIGP) standards. Users with the Contract Administrator or Buyer role can manage Procurement Items necessary to build and manage contracts and/or to establish vendor/item relationships.

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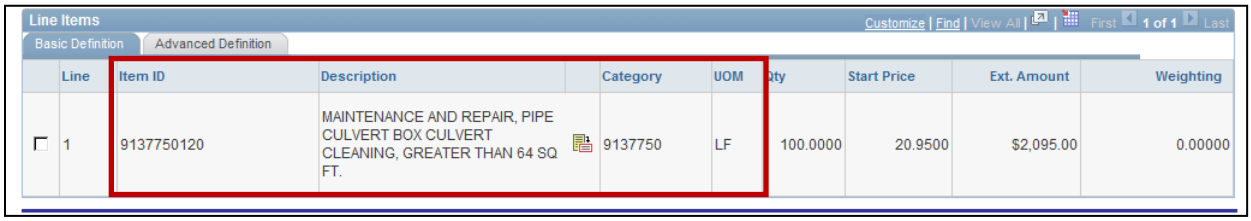
GENERAL ITEM INFORMATION

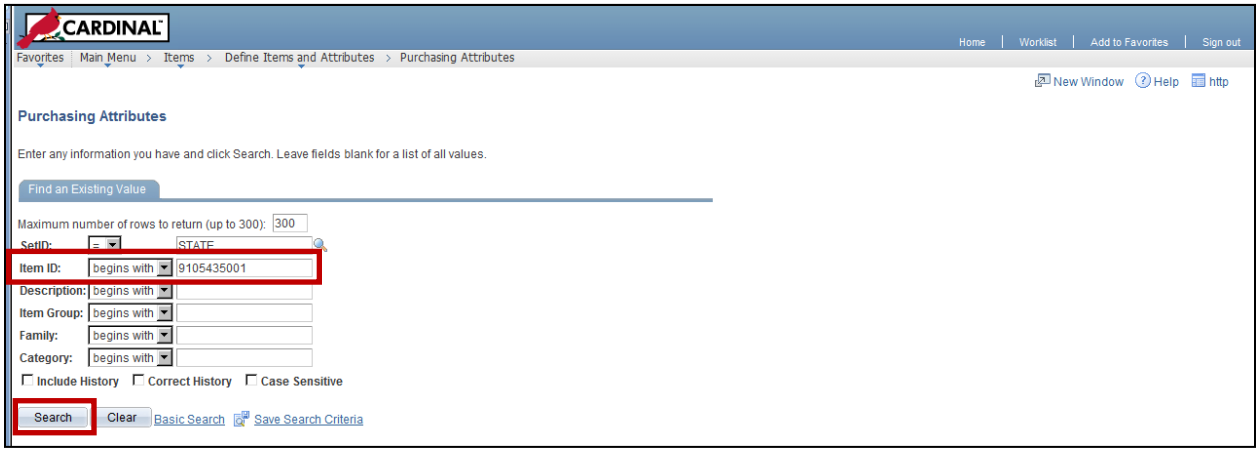
- Items and Categories in Cardinal match NIGP and eVA item numbering.
- **Item = 10 digits** Description and Unit of Measure (UOM) is prefixed.
- **Category = 3, 5 or 7 digits** Description and UOM is open for edit.
- Inventory Items must be to the 10th digit and have a matching WebIMS number.
- Item/Vendor Relationships are required when building Contracts.
- Item/Vendor Relationships are not required when building Requisitions, Purchase Orders and Sourcing Events.



Example: Item shown displays pre-populated **Description, Category** and **UOM**.

CREATING A VENDOR/ITEM RELATIONSHIP

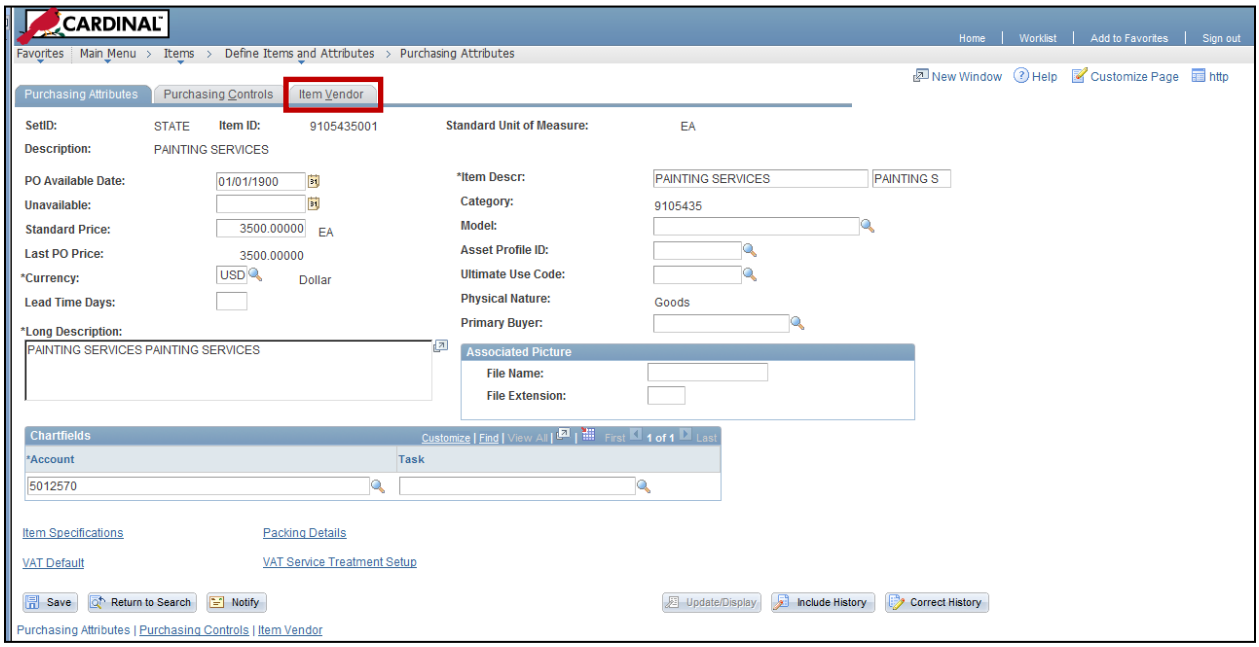
NEW ITEM/VENDOR RELATIONSHIP



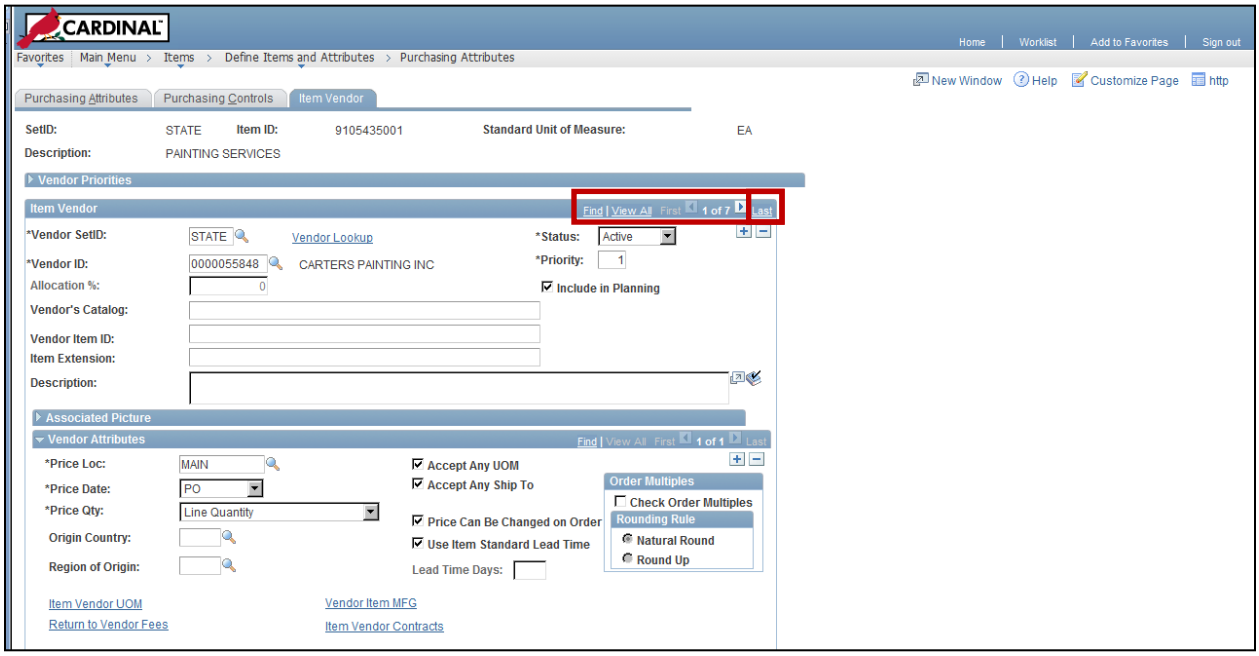
1 Navigate to: Main **Menu > Define Items and Attributes > Purchasing Attributes**

2 Enter **Item ID**. In this example, the item 9105435001(Painting Services) is used.

3 Click **Search** button.

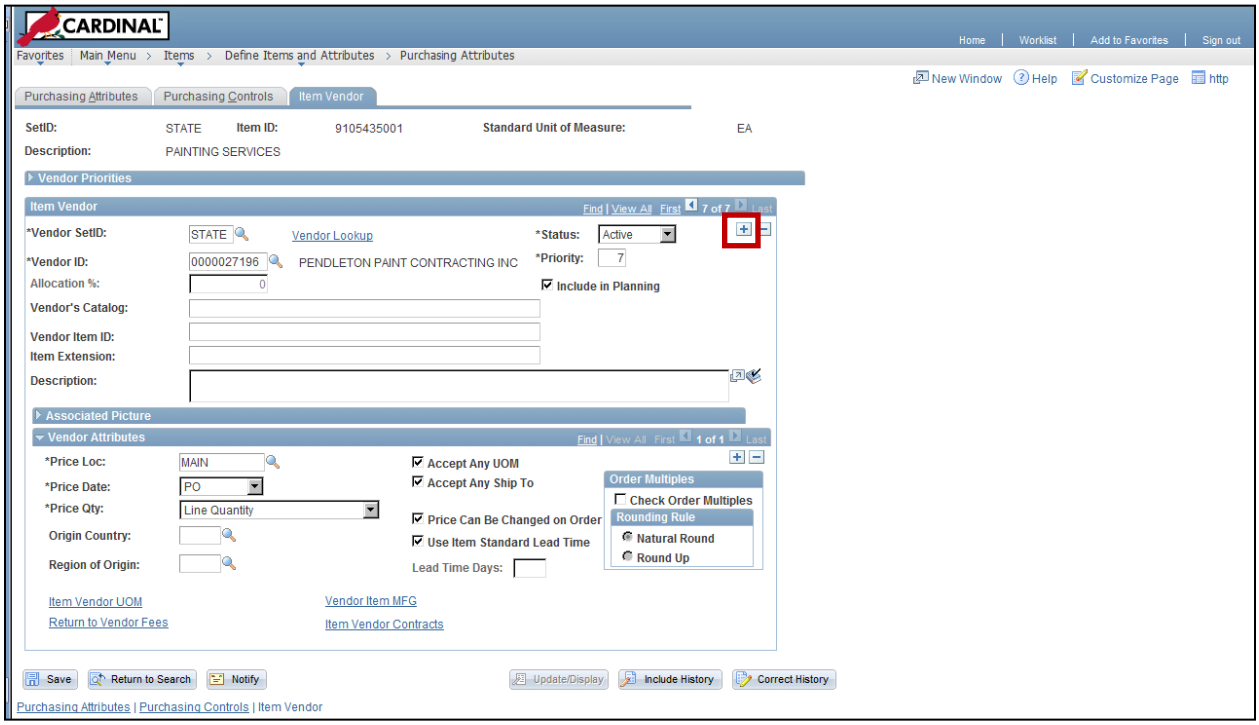


4 Click on the **ItemVendor** tab.

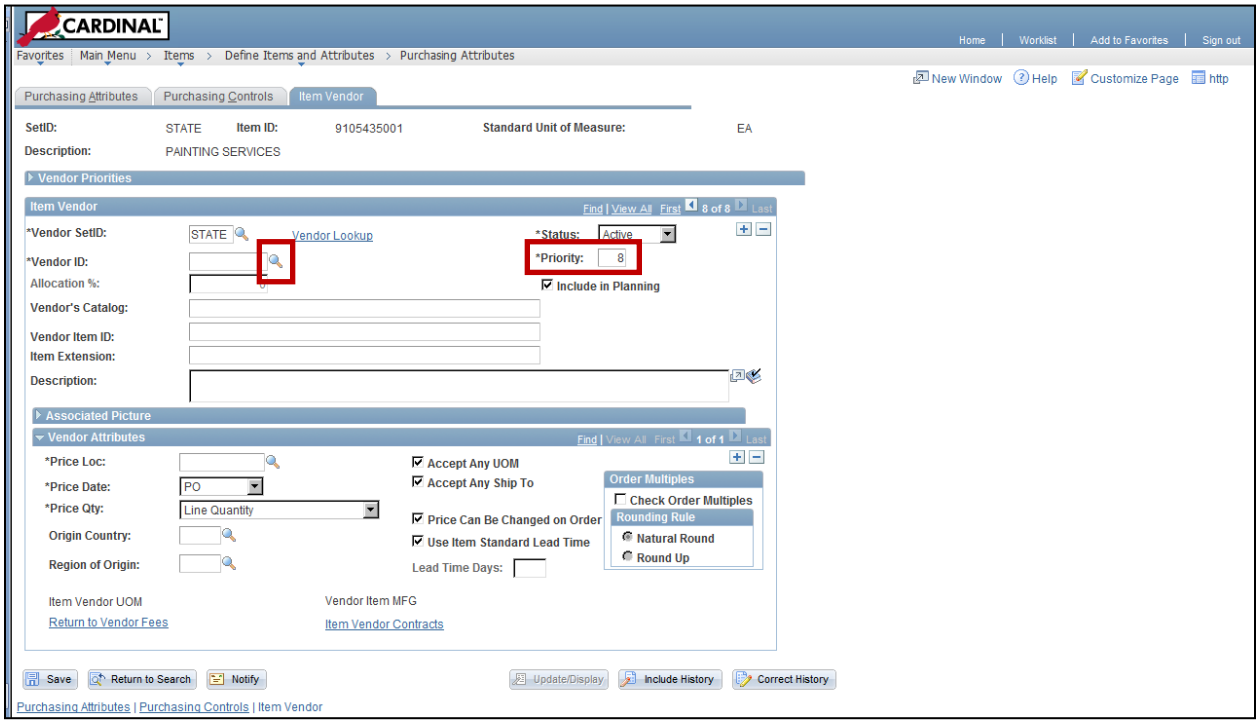


5 Vendor listing is shown. **Note**: You may search for vendors using the **Find**, or **View All** links. In this example, our vendor is not in the list and needs to be added.

6 Click the **Last** link.

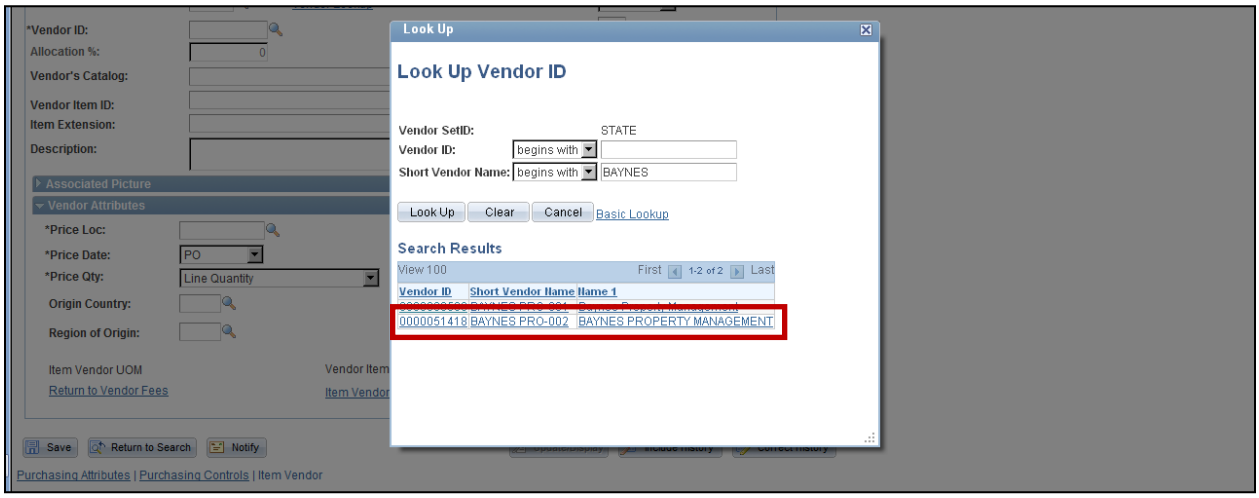


7 Click the blue + sign to add a vendor.

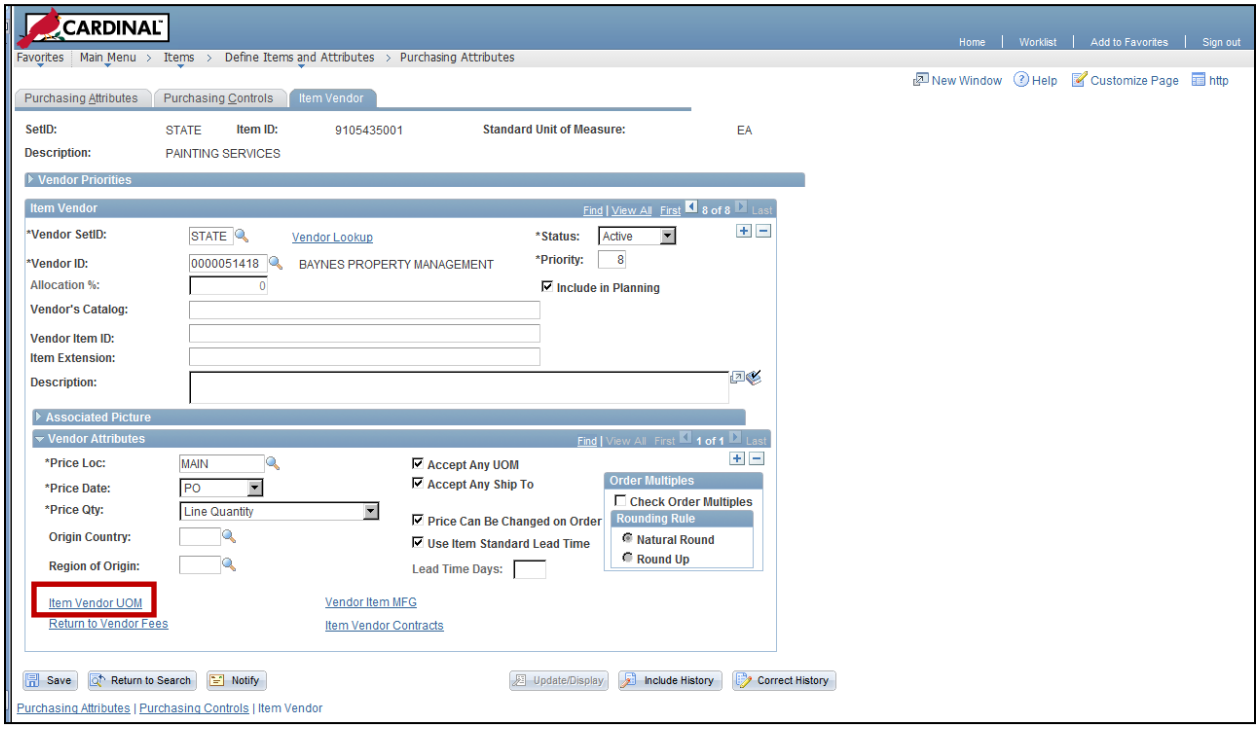


8 Vendor Priority number is incrementally assigned. In this example 8 of 8.

9 Click on the **Vendor ID** lookup icon.

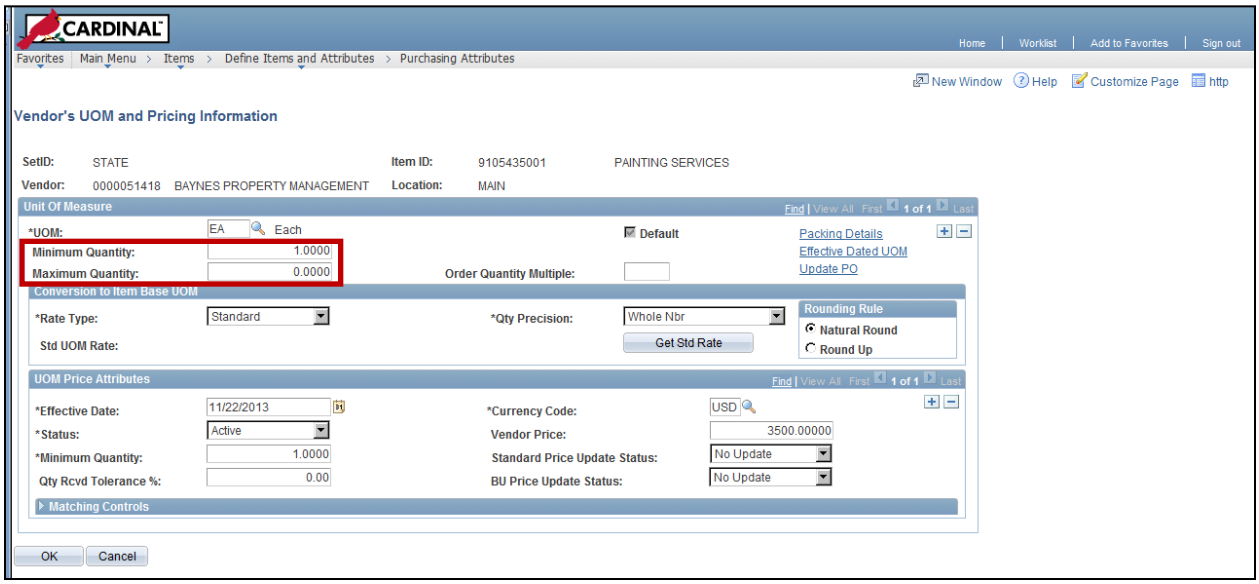


10 Find and click on the selected vendor that you wish to add.

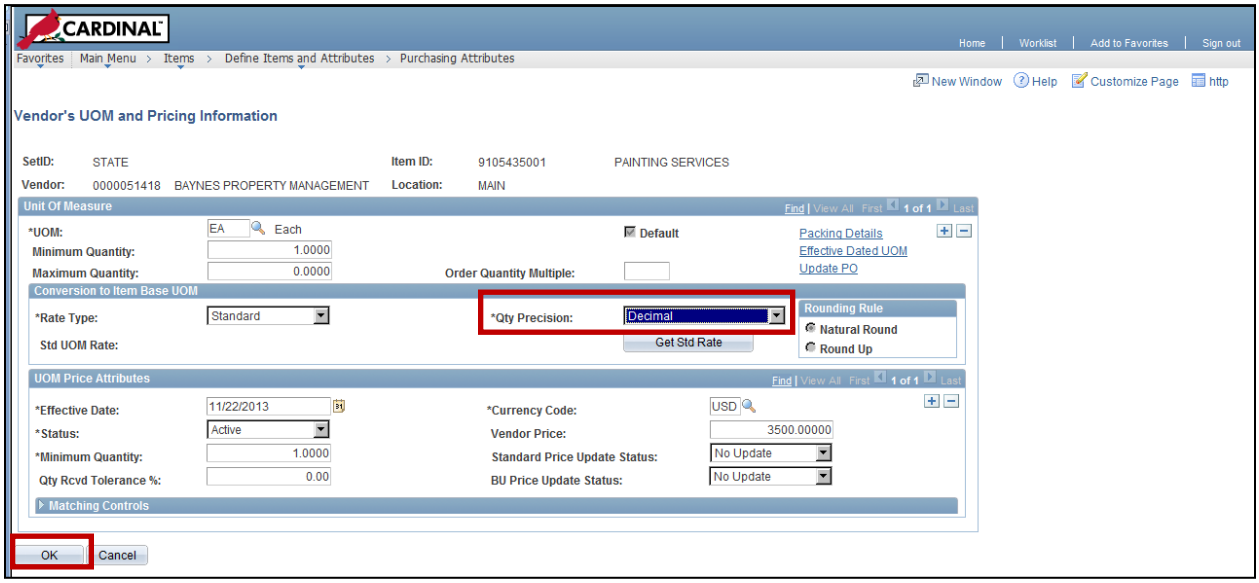


11 Vendor information defaults in as shown.

12 Click on the **Item Vendor UOM** hyperlink.

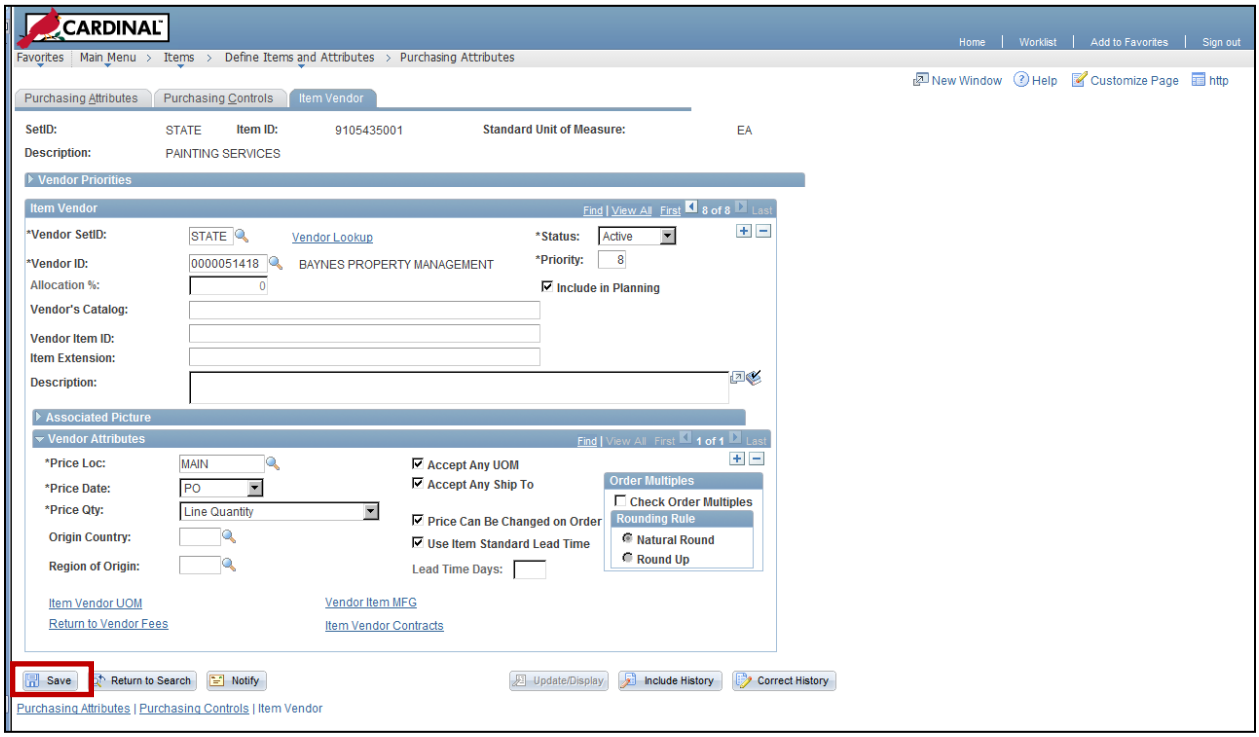


13 Item Vendor information defaults in as shown and available for edit, if necessary. Note: **Minimum Quantity** may be less than 1 and **Maximum Quantity** should be set to 0.



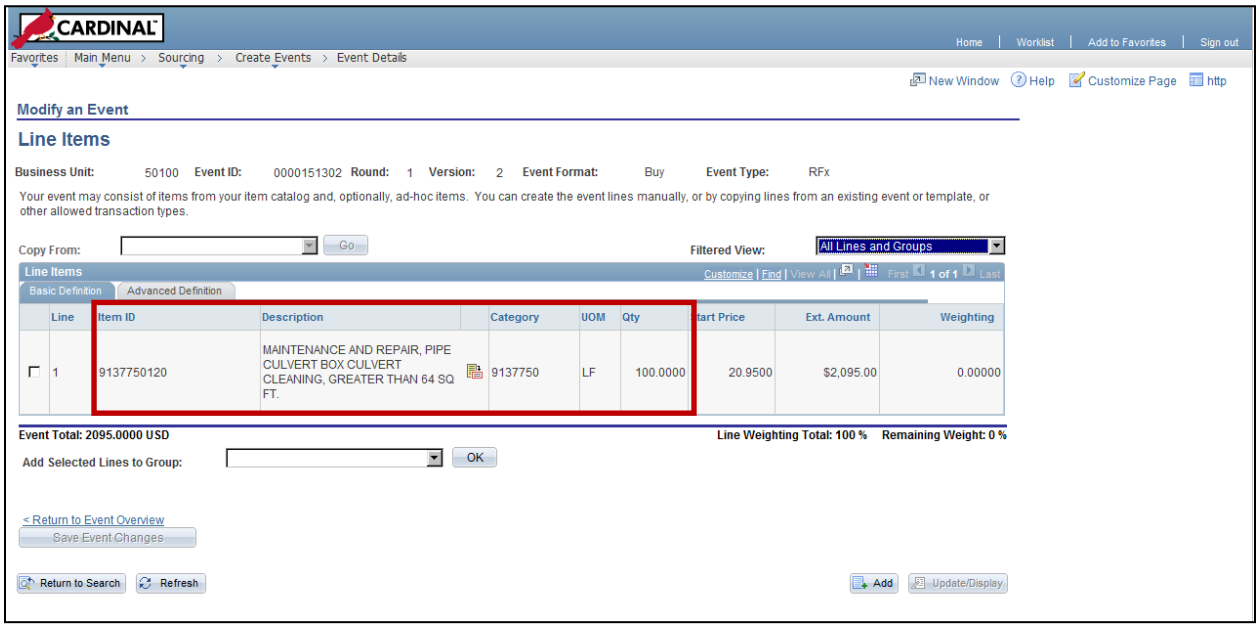
14 Change **Qty Precision** from **Whole Number** to **Decimal**.

15 Click **OK**.

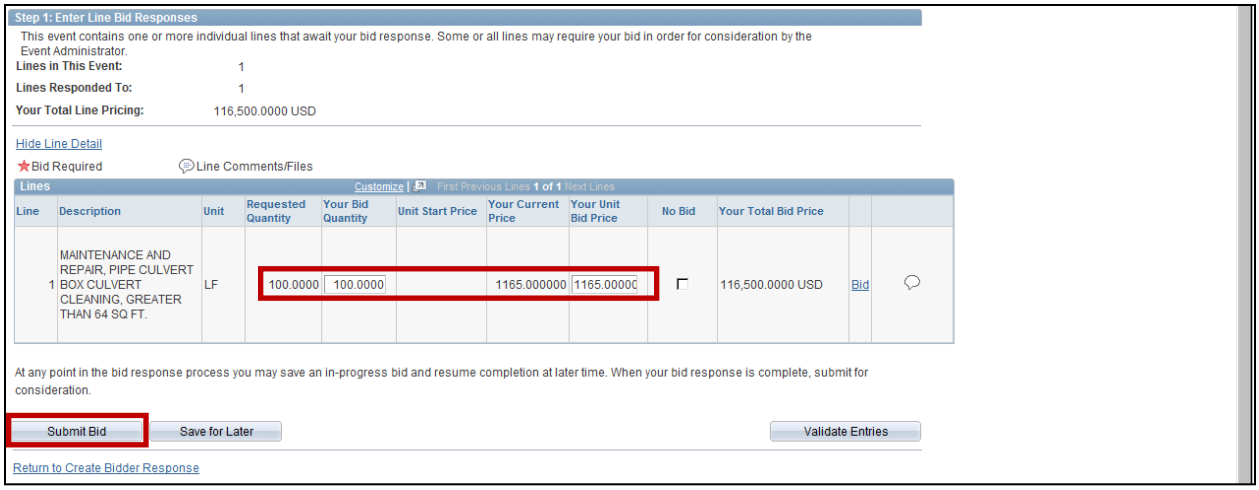


16 Click **Save**.

Strategic Sourcing Events

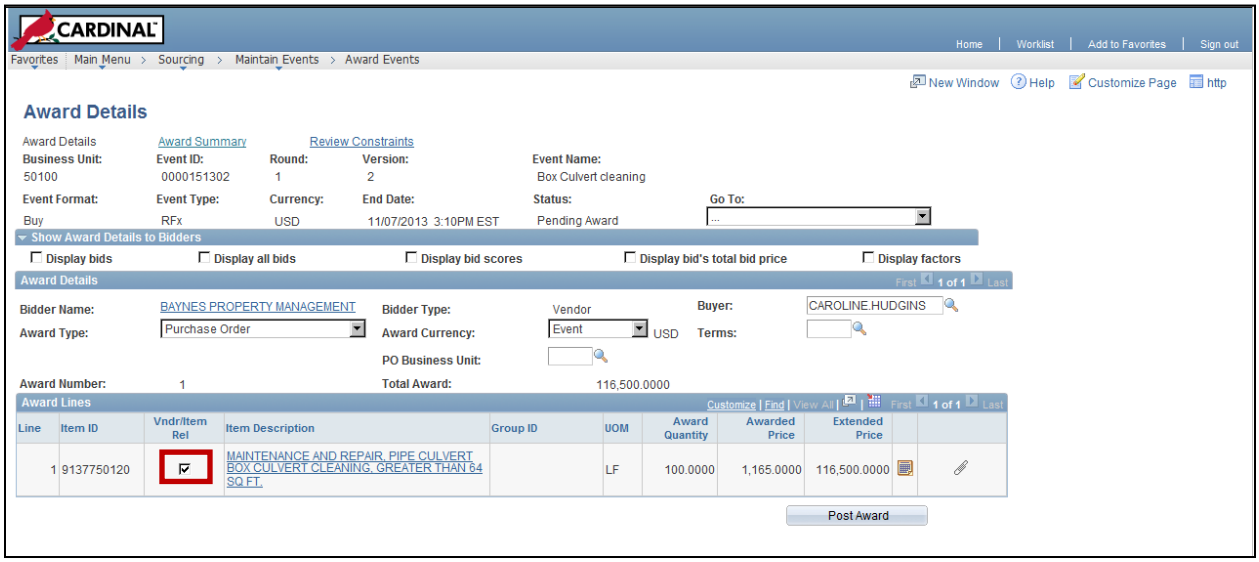


17 Items are inserted into the Sourcing Event. In this example, the item has been selected and the requested quantity is 100 LF.



18 **Bid Quantity** and **Bid Price** are entered.

19 Click on **Submit Bid**.

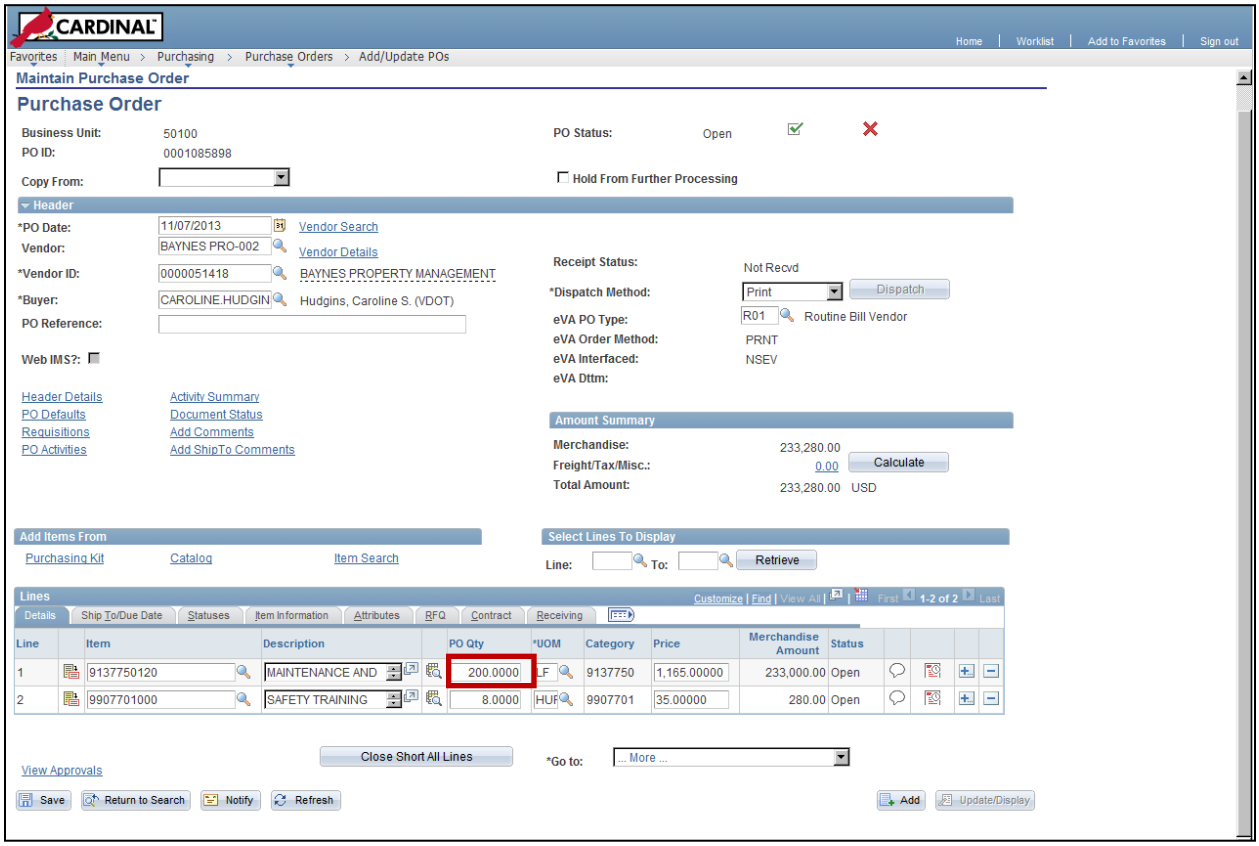


20 Upon Bidder selection and **Post Award**, the **Vendor/Item Relationship** is automatically established.

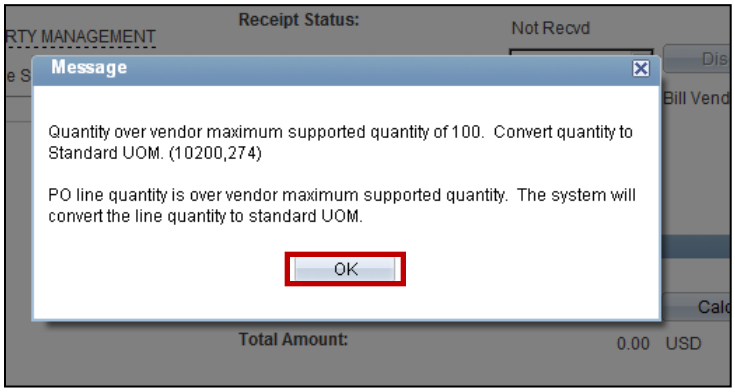
Note: The item is now available to be added to any contract specific to this vendor.

PURCHASE ORDERS

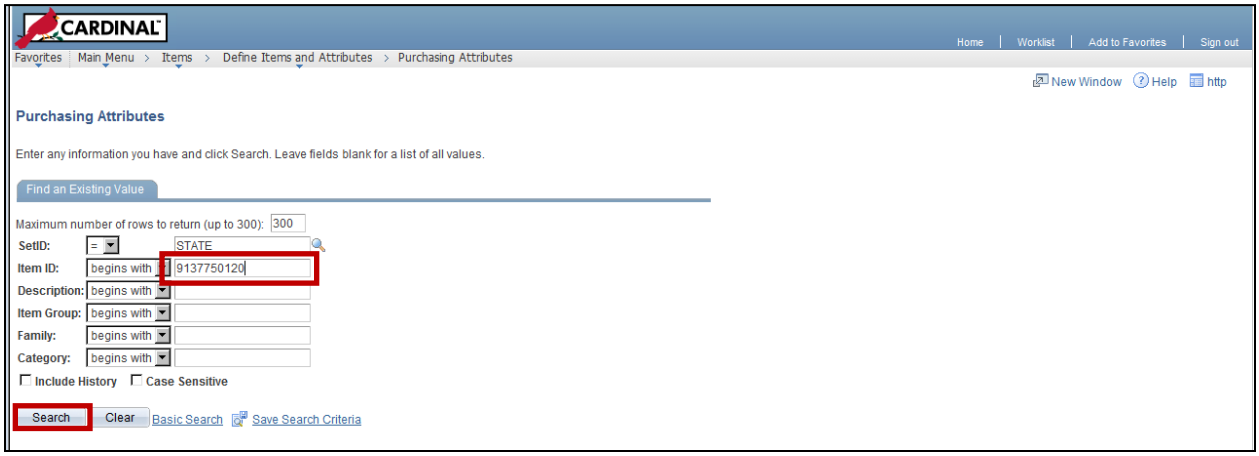
Note: Item/Vendor Relationships are not required when creating ad-hoc Purchase Orders. Cardinal allows the user to select <u>any</u> item or category for insertion into a line.



Although, when entering a quantity greater than the quantity from a Sourcing Event, the following message may be displayed. If so…..



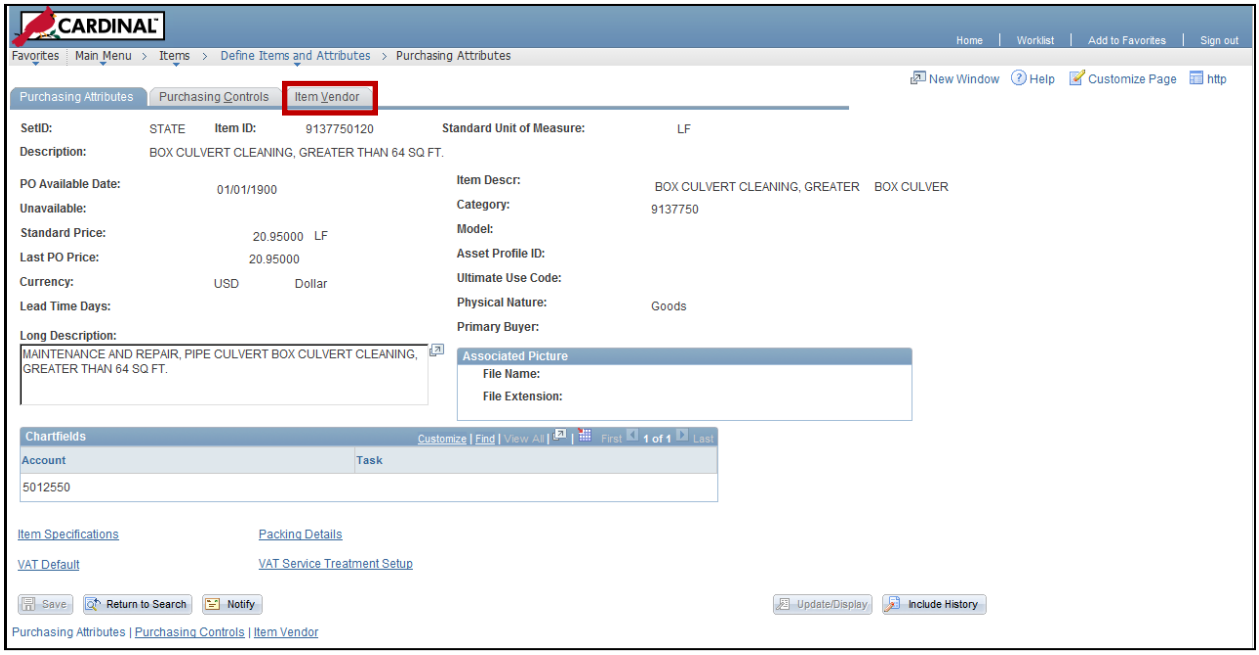
1 Click **OK.**



2 Navigate to: Items > Define Items and Attributes > Purchasing Attributes

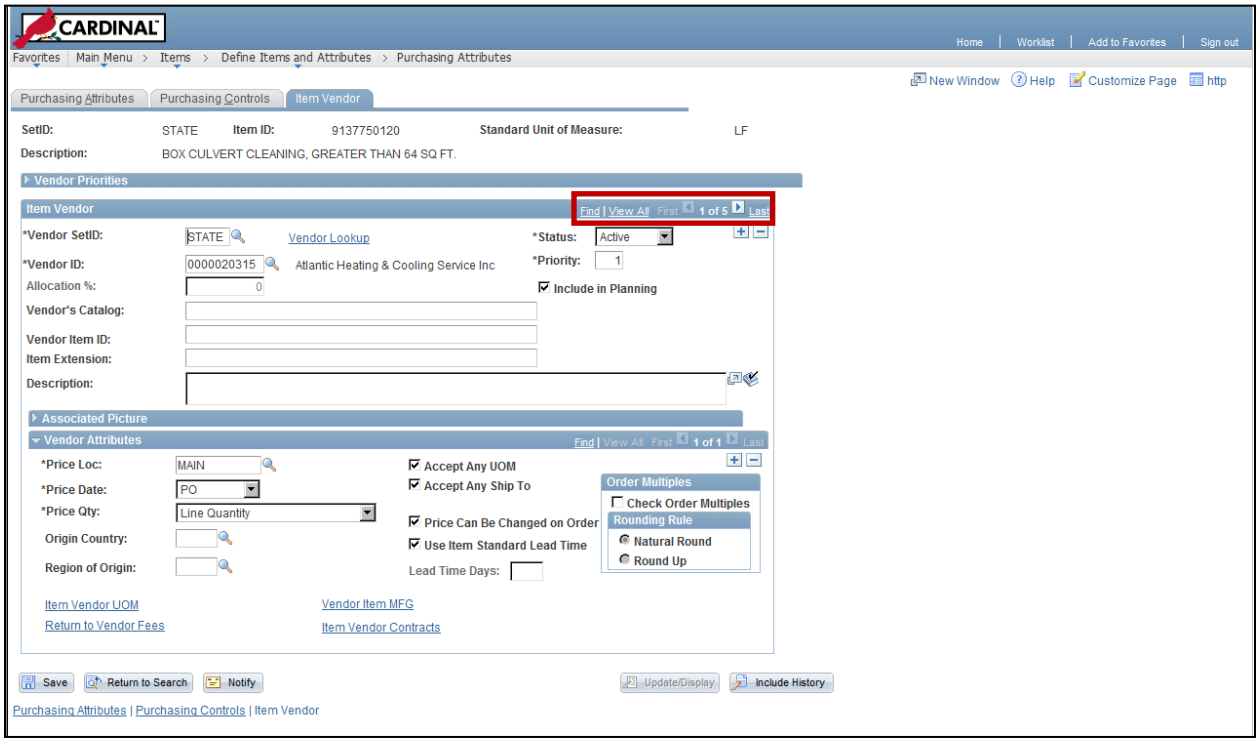
3 Enter **Item ID** from the event or contract award.

4 Click **Search** button.

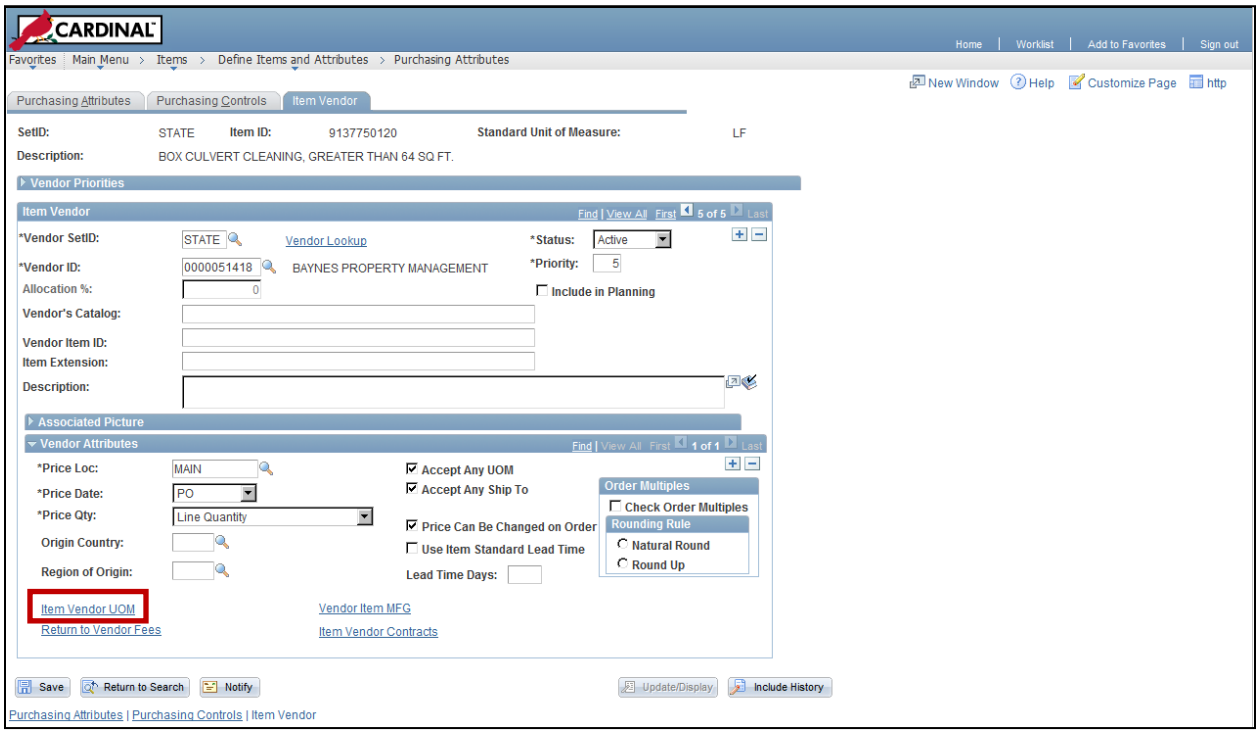


5 Purchasing Attributes page displays.

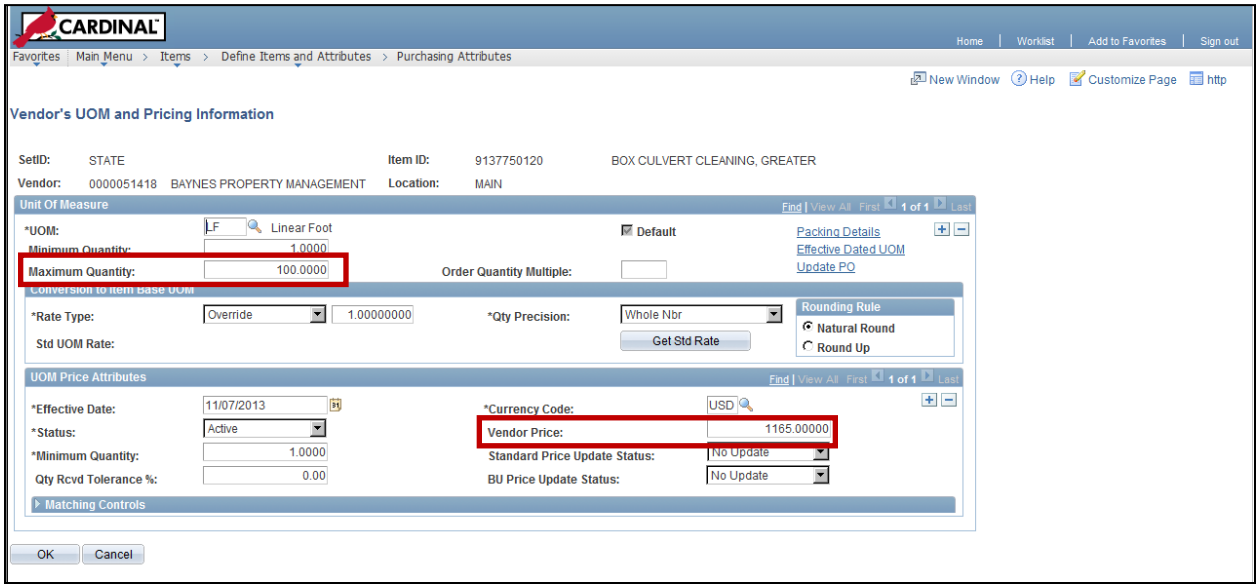
6 Click on **ItemVendor** tab.



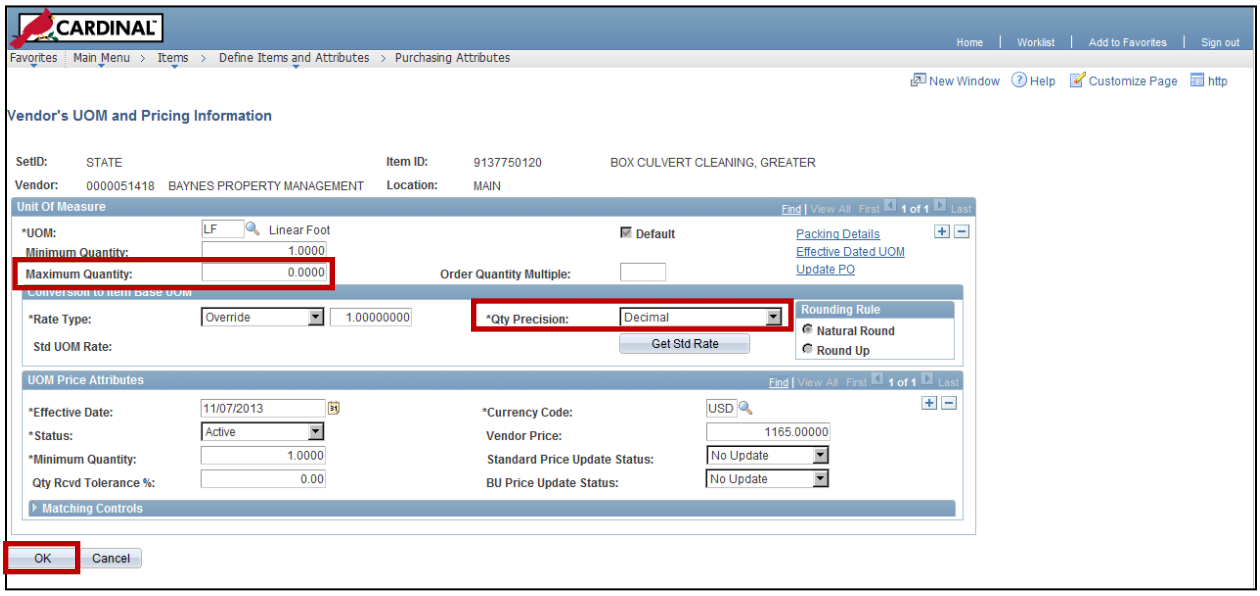
7 Search for the selected PO vendor. In this example, we are looking for the vendor Baynes Property Management.



8 Click on **Item Vendor UOM** hyperlink.



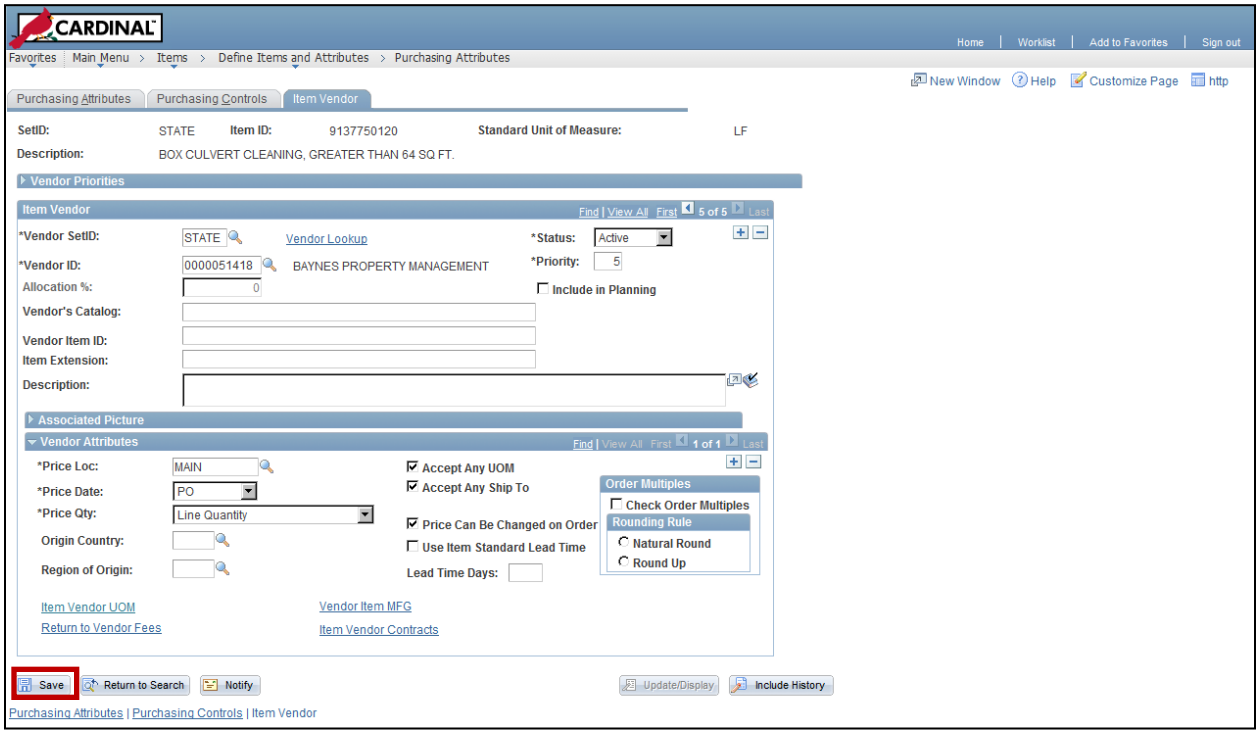
9 **Note**: **Maximum Quantity** and **Vendor Price** defaults in from the Sourcing Event.



10 Change **Maximum Quantity** to 0.

11 Change **Qty Precision** to Decimal.

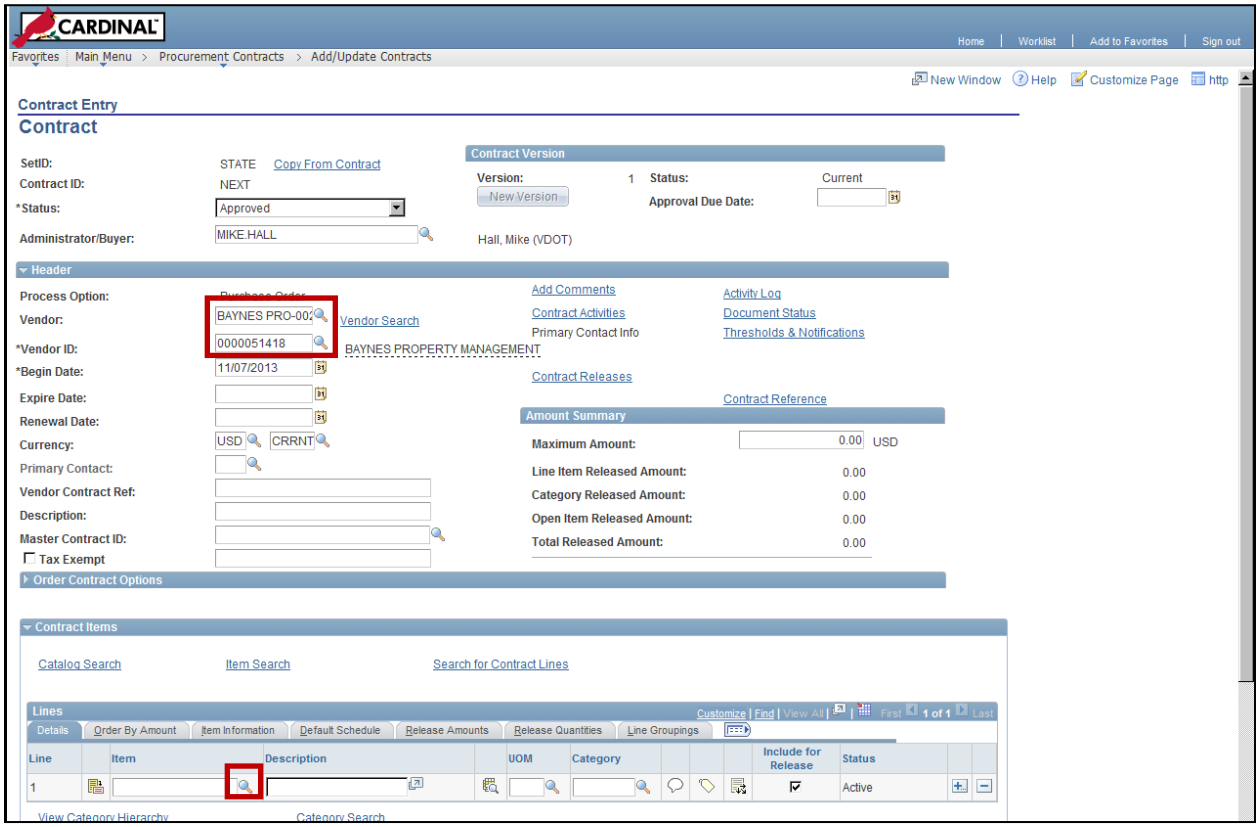
12 Click **OK**.



13 Click **Save**.

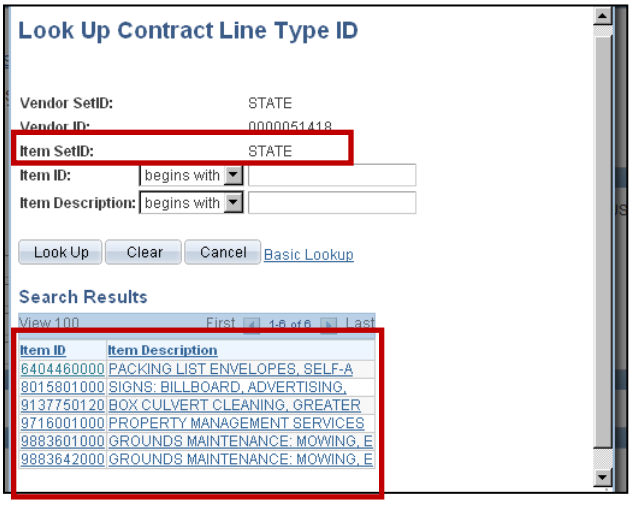
Note: This item is now attached to this vendor and is open for ordering on contracts and purchase orders for any quantity. You should never need to edit this Item/Vendor relationship again.

PROCUREMENT CONTRACTS



14 Enter the **Vendor** name.

15 Click on the **Item** lookup icon.



Note: Only those items attached to this vendor (Item/Vendor Relationship) are displayed for selection.

16 Select an item from the list, or create a new item/vendor relationship. See pages 2-6.

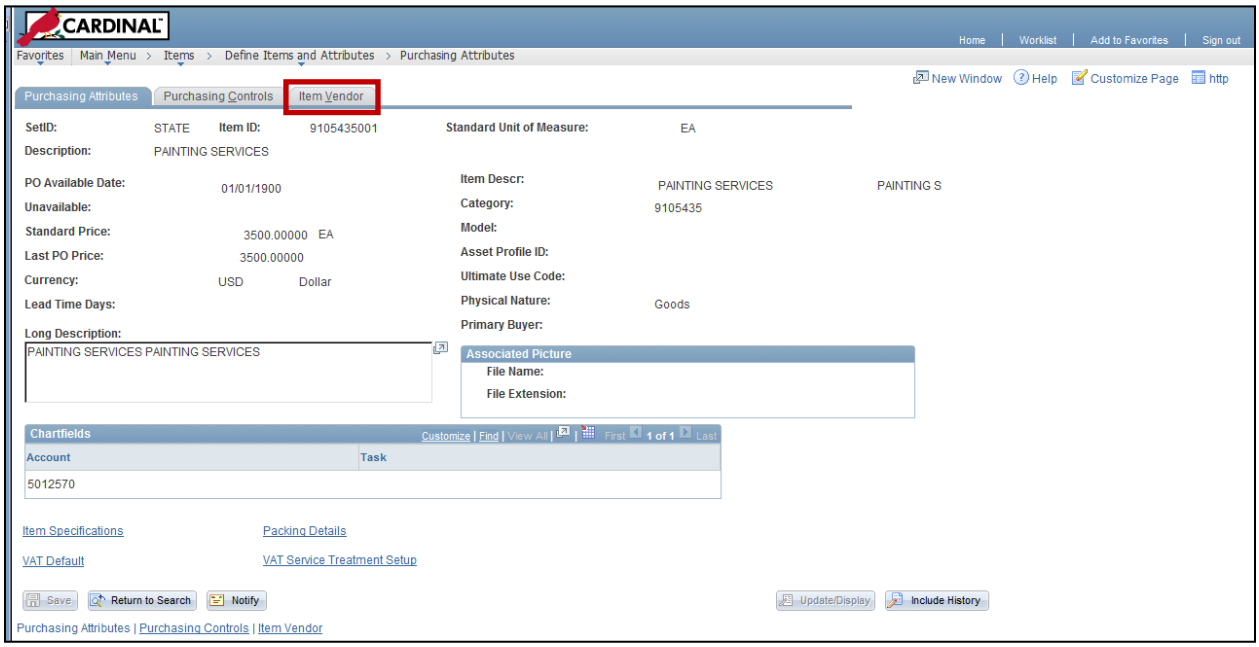
ADD ITEM UNIT OF MEASURE (UOM)

For Example:

9105435001 (Painting Services) UOM is **EA** (each). 9105435000 (Painting Services) UOM is **HUR** (hour). You wish to have a UOM of **FTK** (square foot), for a specific contract service.

1 Contact the Cardinal PR Helpdesk through VITA to request new UOM.

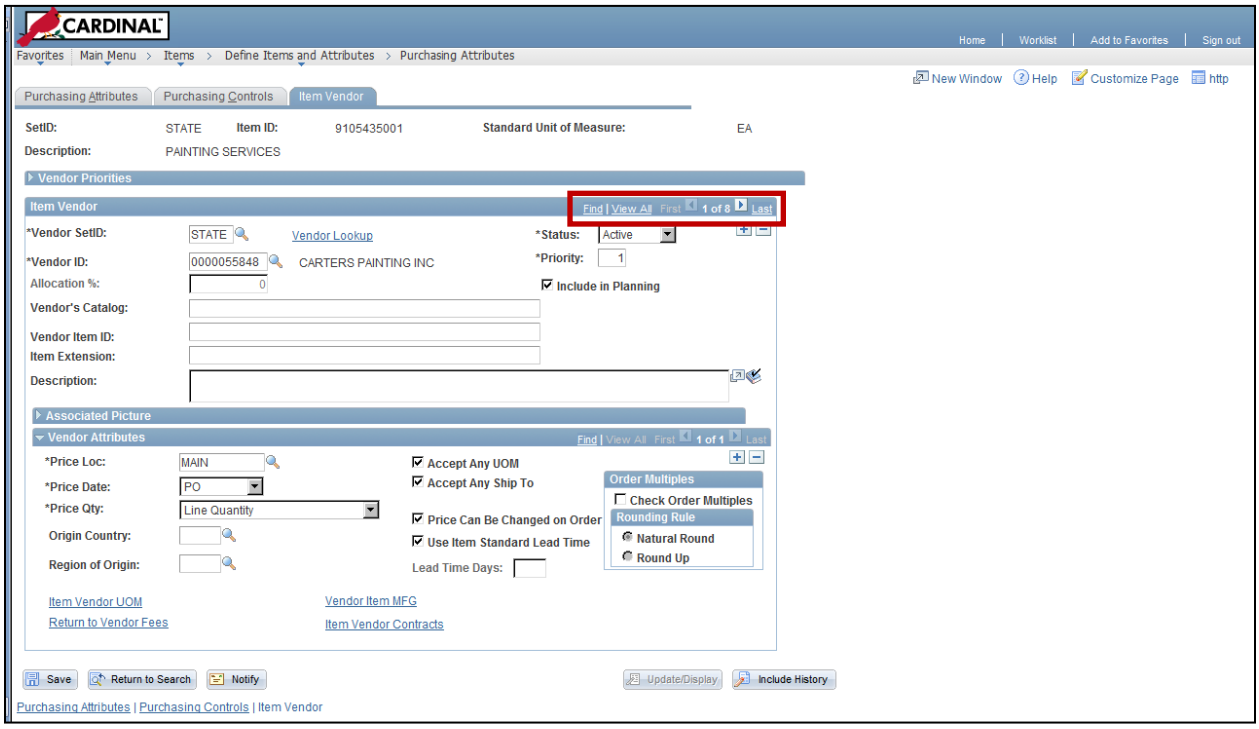
Upon notification of resolution….



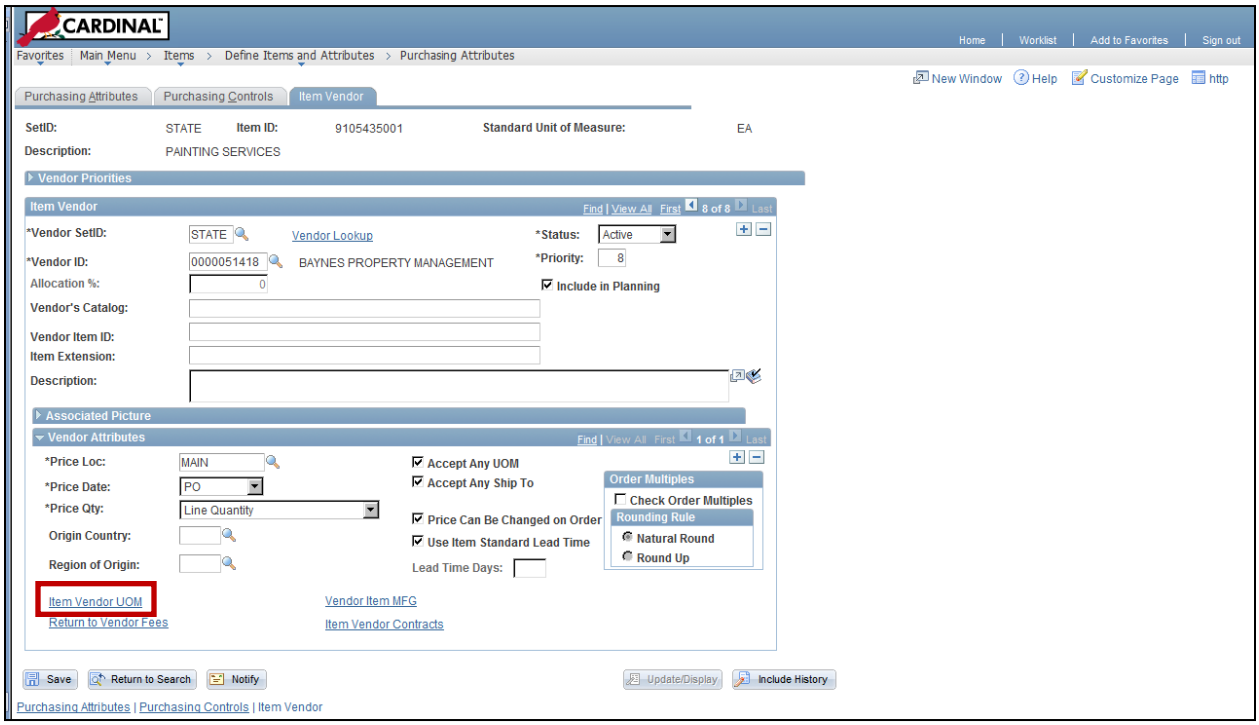
2 Navigate to: **Main Menu > Items > Define Items and Attributes > Purchasing Attributes**

3 Find your Item using the search tables.

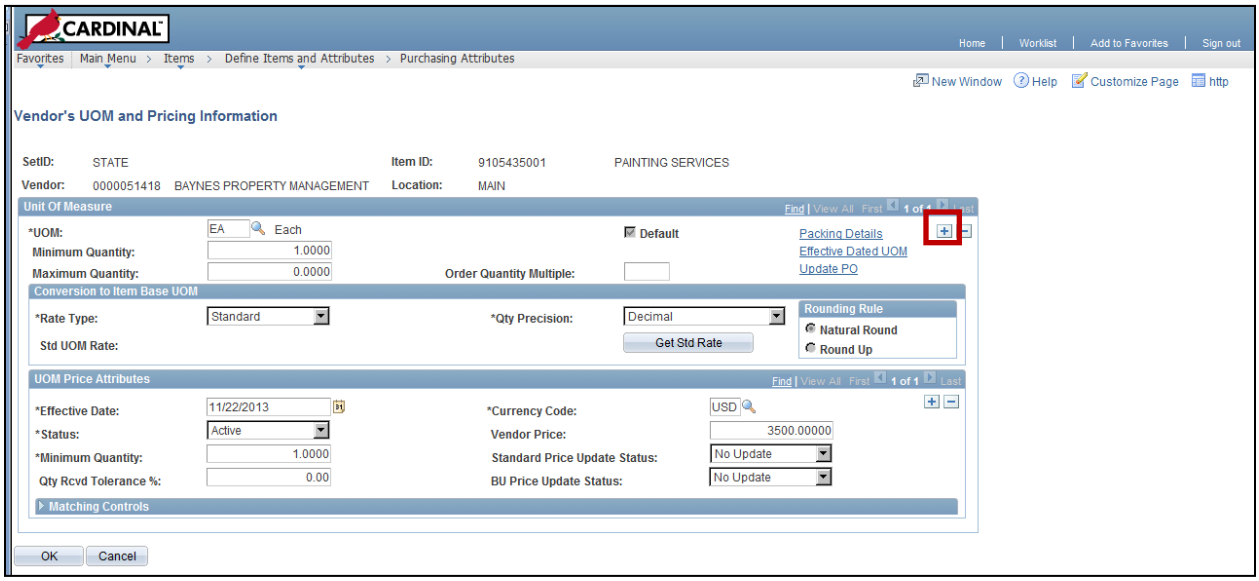
4 Click on **ItemVendor** tab.



5 Find your vendor using the **Item Vendor** search listing.

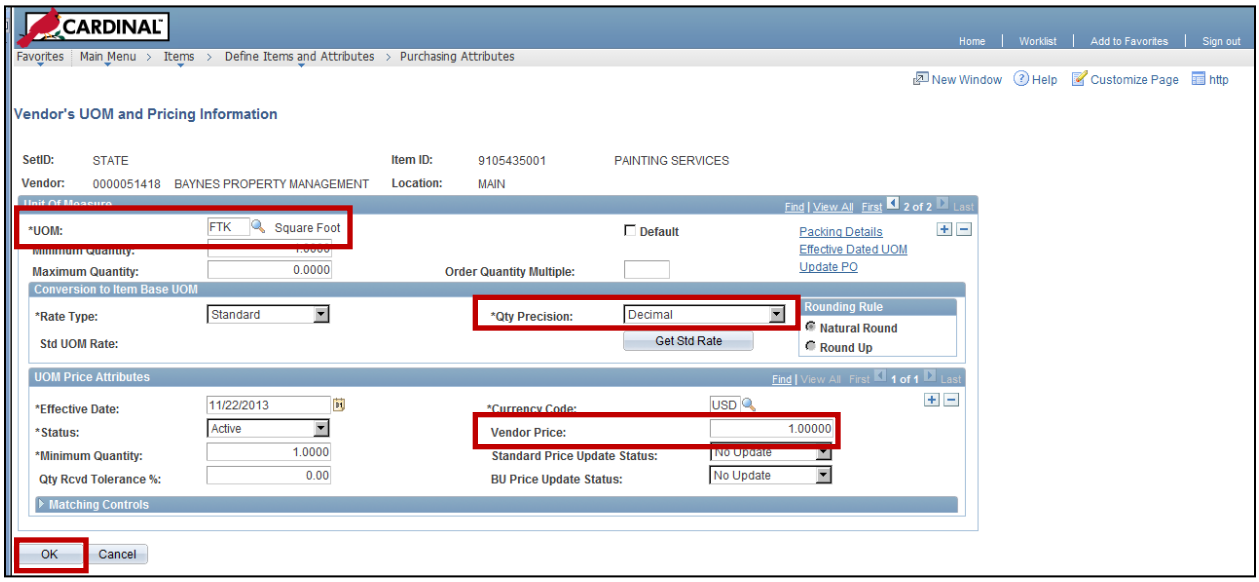


6 Click on the **Item Vendor UOM** hyperlink.



7 Vendor's UOM and Pricing Information are displayed.

8 Click the blue + sign to add a new UOM.

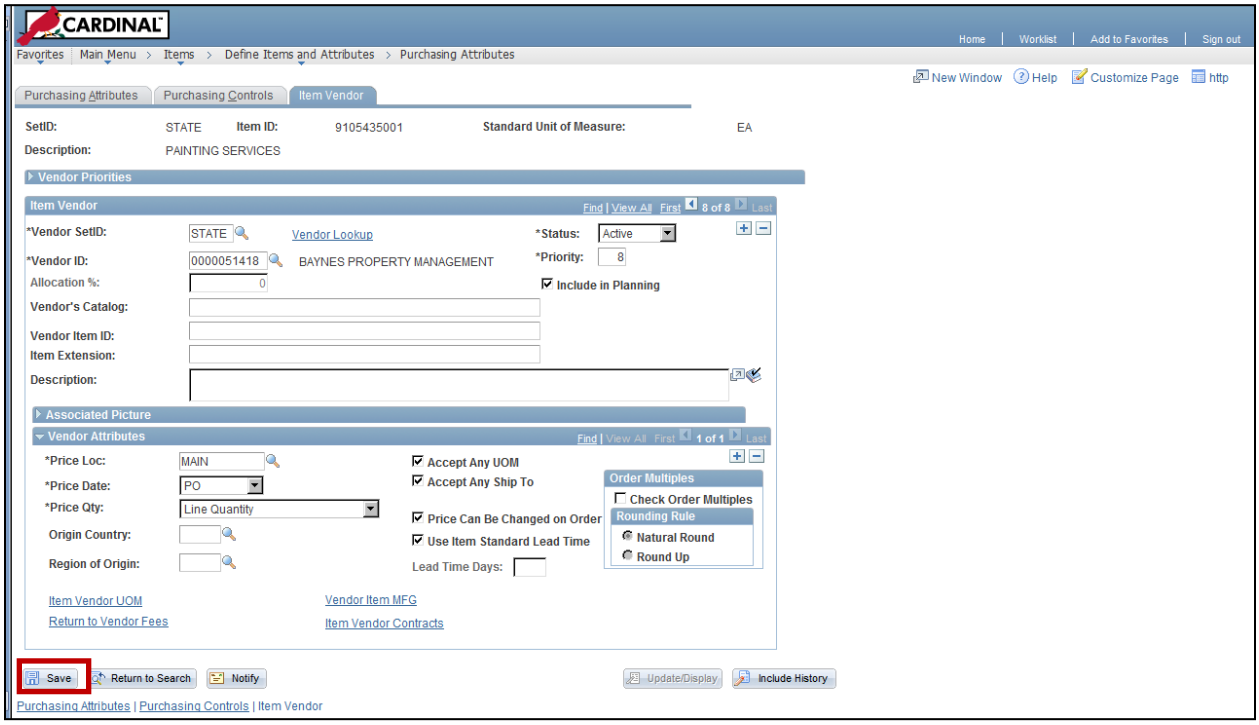


9 Select the new **UOM**.

10 Change the **Qty Precision** to Decimal.

11 Enter a **Vendor Price**. **Note**: any value can be entered and will default on the PO.

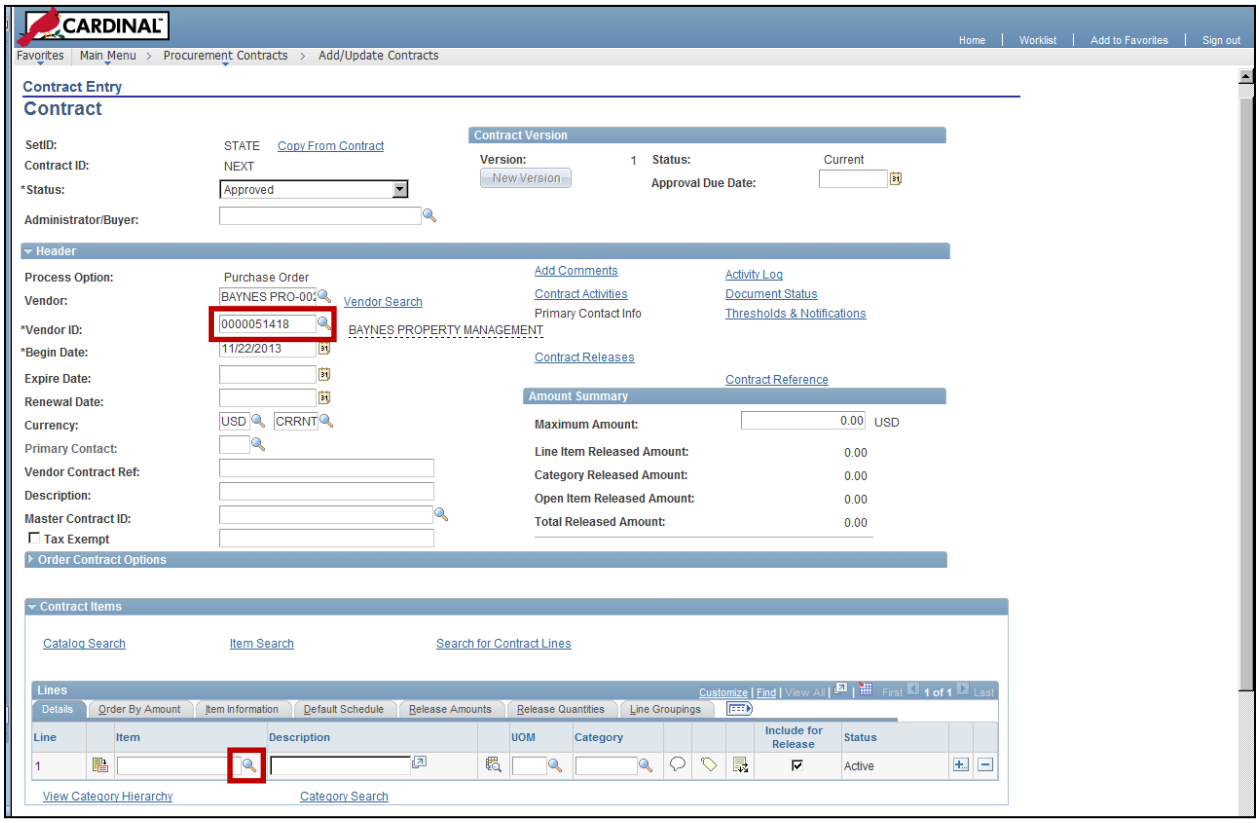
12 Click **OK**.



13 Click **Save**.

The Item is now set up with more than one UOM and is available for selection when using this specific vendor.

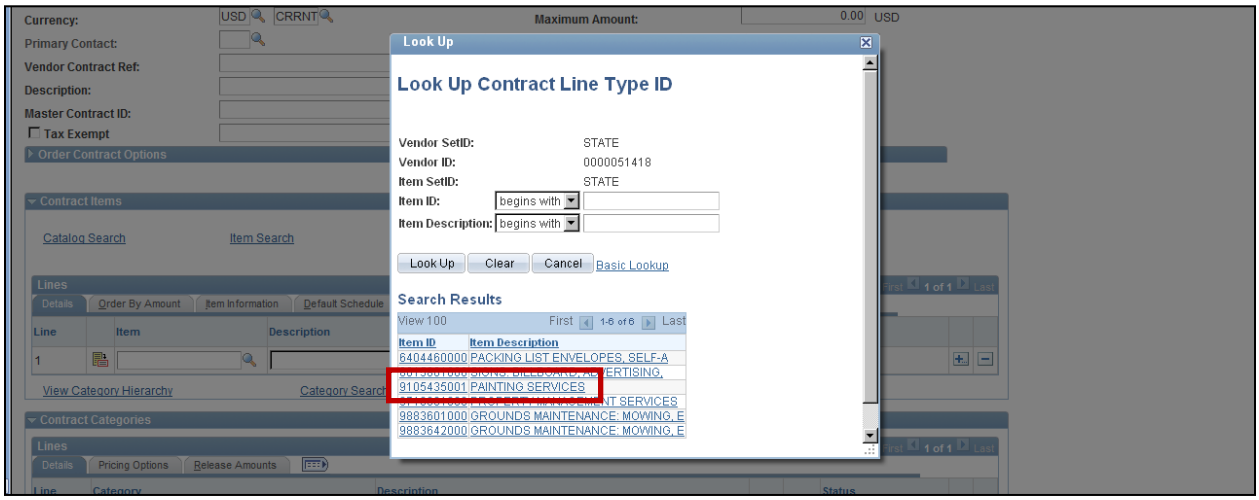
Procurement Contract Example:



14 Create a Contract with this Vendor for Painting Services by SQ. FT.

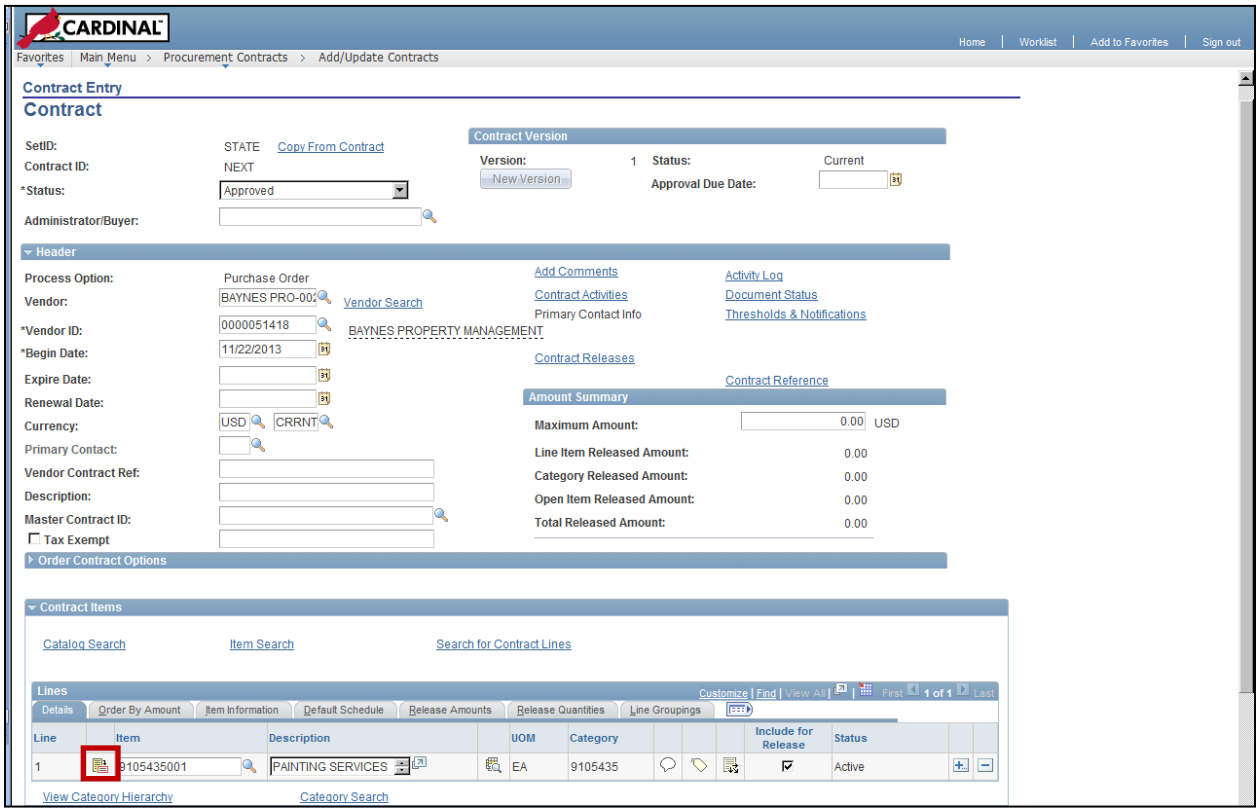
15 Enter **Vendor ID**.

16 Click on the Item Lookup icon.



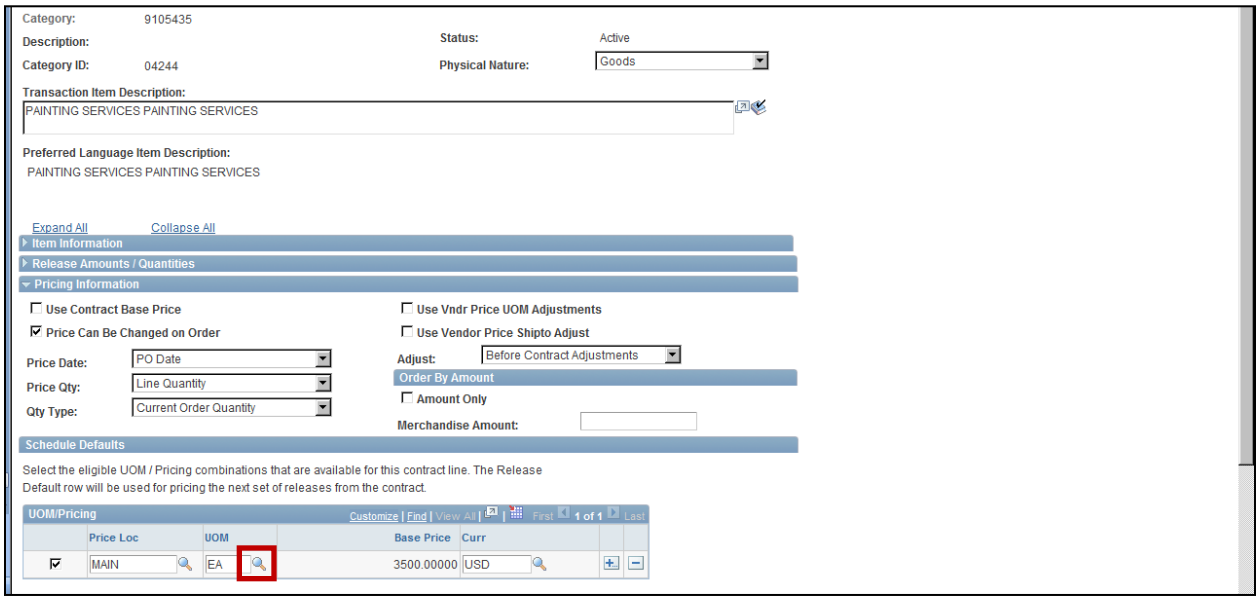
17 Item related to this vendor are shown.

18 Click **PAINTING SERVICES** hyperlink.

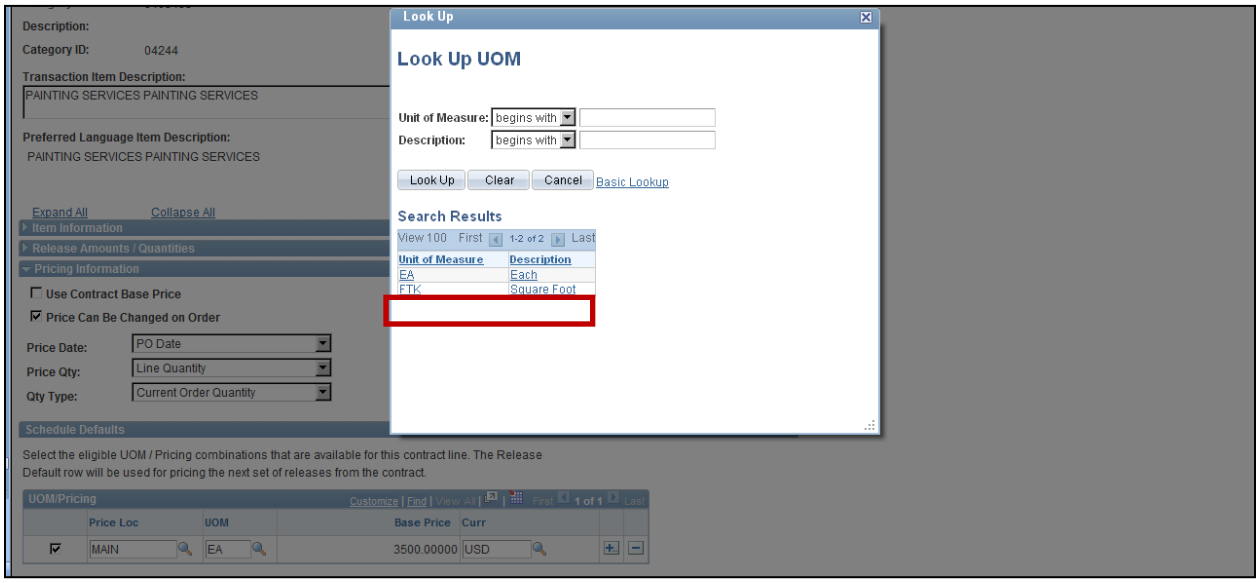


19 The default UOM of EA is automatically populated.

20 Click the Line Details icon.

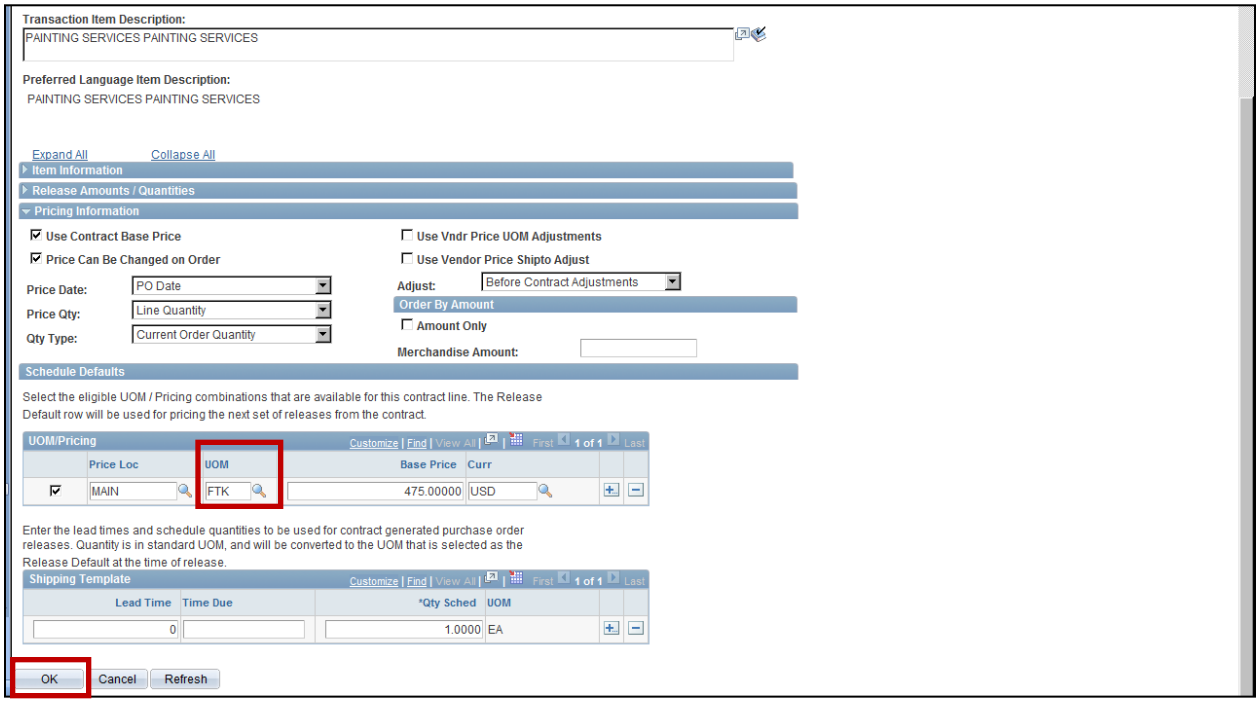


21 Click the **UOM** lookup icon.



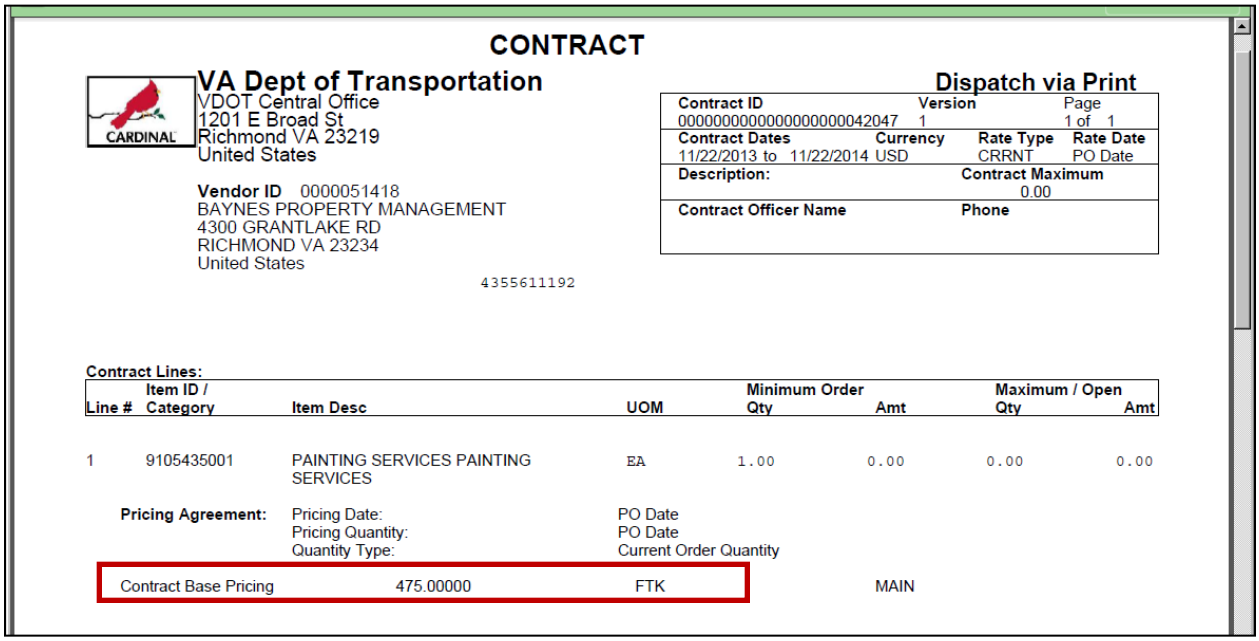
22 Both available Units of Measure are displayed.

23 Select **Square Foot** hyperlink.



24 **Square Foot** UOM is populated.

25 Click **OK** and complete the contract entry procedures.



CONTRACT

VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States

Dispatch via Print

Contract ID	Version	Page
00000000000000000000042047	1	1 of 1

Contract Dates	Currency	Rate Type	Rate Date
11/22/2013 to 11/22/2014	USD	CRRNT	PO Date

Description:

Contract Maximum 0.00

Contract Officer Name

Phone

Vendor ID 0000051418
BAYNES PROPERTY MANAGEMENT
4300 GRANTLAKE RD
RICHMOND VA 23234
United States

4355611192

Contract Lines:

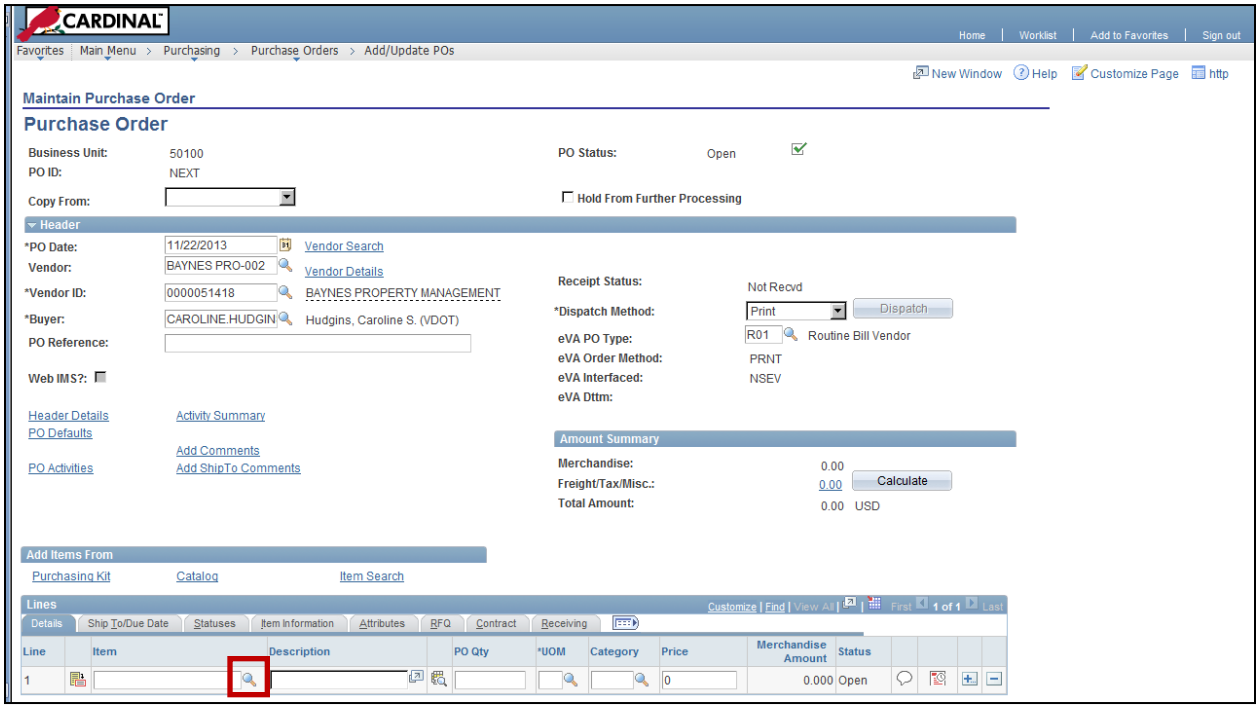
Line #	Item ID / Category	Item Desc	UOM	Minimum Order Qty	Minimum Order Amt	Maximum / Open Qty	Maximum / Open Amt
1	9105435001	PAINTING SERVICES PAINTING SERVICES	EA	1.00	0.00	0.00	0.00

Pricing Agreement: Pricing Date: PO Date
Pricing Quantity: PO Date
Quantity Type: Current Order Quantity

Contract Base Pricing 475.00000 FTK MAIN

26 Printed contract displays UOM as desired.

Purchase Order Example:



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window | Help | Customize Page | http

Maintain Purchase Order

Purchase Order

Business Unit: 50100
PO ID: NEXT
Copy From:
PO Status: Open
Hold From Further Processing

Header

*PO Date: 11/22/2013 Vendor Search
Vendor: BAYNES PRO-002 Vendor Details
*Vendor ID: 0000051418 BAYNES PROPERTY MANAGEMENT
*Buyer: CAROLINE.HUDGIN Hudgins, Caroline S. (VDOT)
PO Reference:
Web IMS?:

Receipt Status: Not Recvd
*Dispatch Method: Print Dispatch
eVA PO Type: R01 Routine Bill Vendor
eVA Order Method: PRNT
eVA Interfaced: NSEV
eVA Dttm:

Header Details
PO Defaults
Activity Summary
Add Comments
PO Activities
Add ShipTo Comments

Amount Summary

Merchandise: 0.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 0.00 USD

Add Items From

Purchasing Kit | Catalog | Item Search

Lines

Customize | Find | View All | First 1 of 1 Last

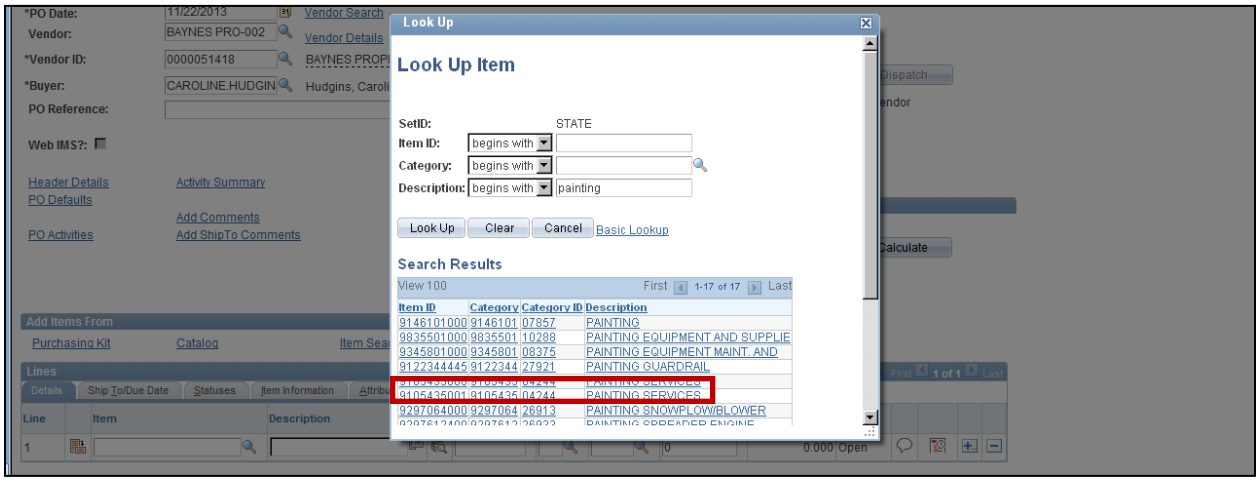
Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1						0	0.000	Open

27 Create a Purchase Order with this Vendor for Painting Services by SQ. FT.

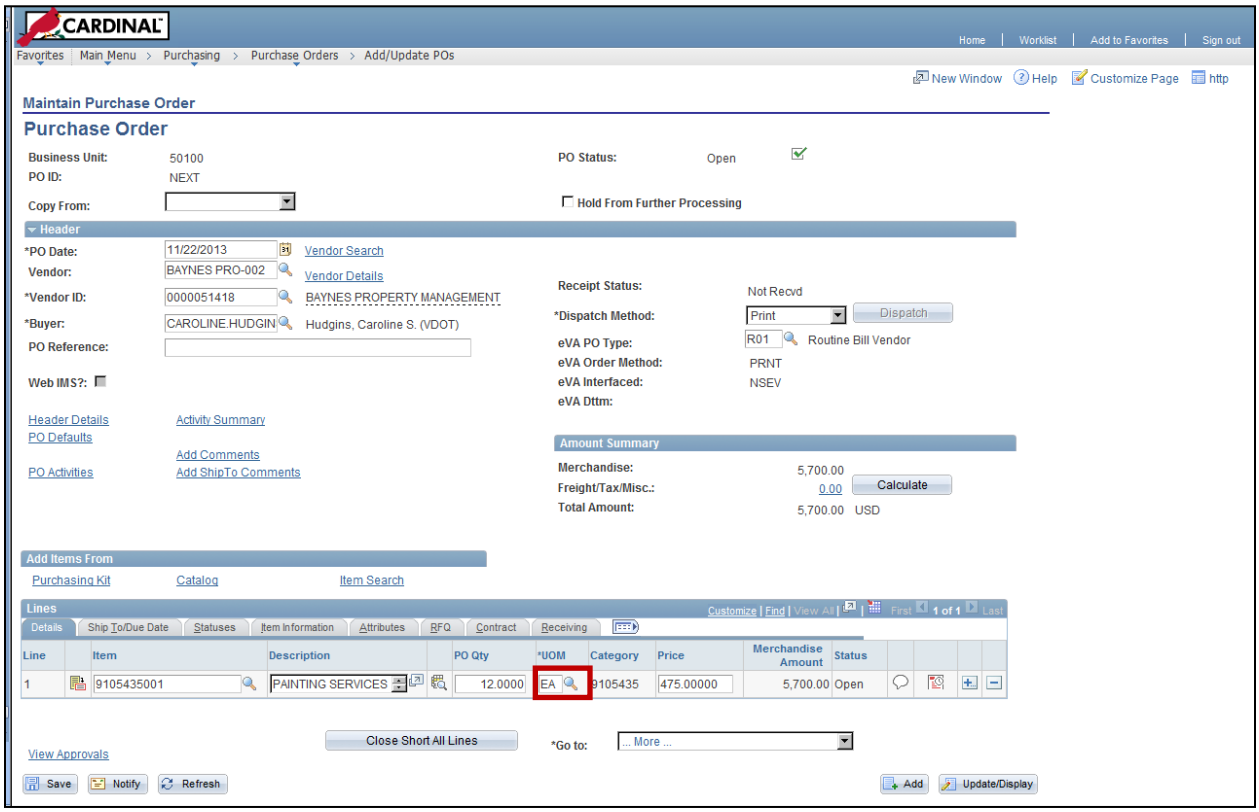
28 Enter **Vendor ID**.

29 Click on the Item Lookup icon.

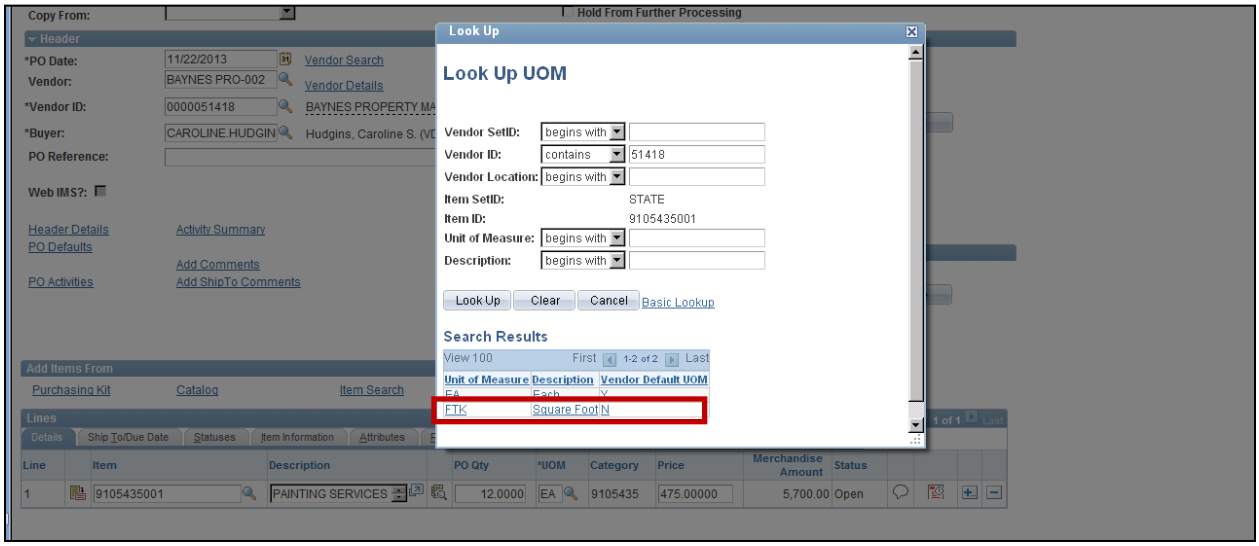


30 Enter search criteria to find the item. **For Example:** Description = painting

31 Click on selected item hyperlink.

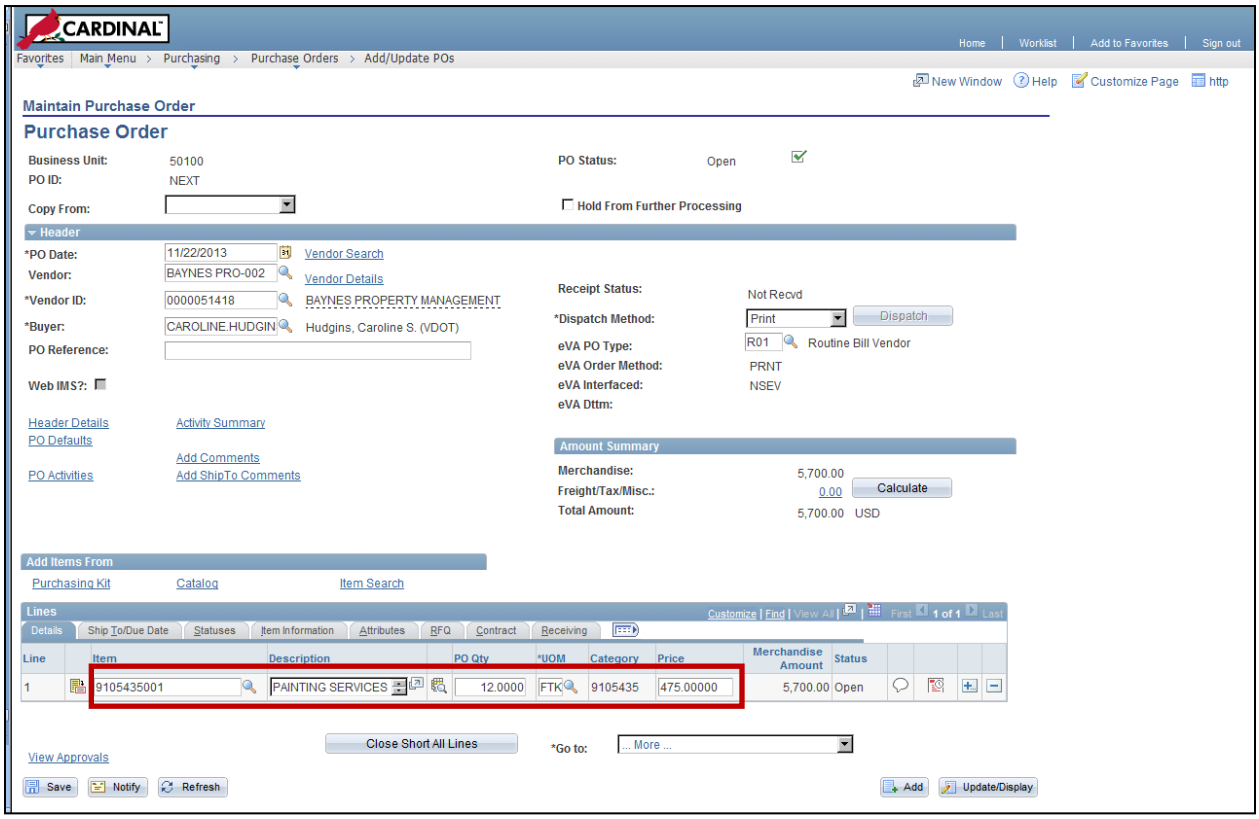


32 Click on **UOM** Lookup icon.



33 Both Units of Measure as displayed for selection.

34 Click on selected **UOM** hyperlink.



35 Purchase Order line information defaults as selected and ready for completion.