

### About Item Set-Up

Item Set-Up is integral to the Cardinal Procurement module because it provides a means to track commodity prices, quantities used, market trends and quality of goods/service that you receive from vendors by item, helping you make better purchasing decisions. Only authorized Fiscal Division Inventory Programs Section (IPS) and Administrative Services Division (ASD) employees can establish new items and define item attributes in Cardinal. The Contract Administrator has access to create an item/vendor relationship for any item in Cardinal.

Item attributes in Cardinal include an Item Category and ID number, the purchasing description, Unit of Measure (UOM), related vendors, pricing information and WebIMS inventory ID (if applicable).

### Understanding Purchasing Items

The item code structure used in purchasing is the National Institute of Governmental Purchasing (NIGP) standard. Cardinal purchasing shares its information about items with other Cardinal Financial modules as well as eVA. NIGP establishes categories that group the item codes into commodities, which are represented by three, five and seven digits. Ten digit values are very specific and have a fixed Unit of Measure (UOM). Although each item established in the system is directly associated with one category, a hierarchy of categories is established in Cardinal. This hierarchy is used by the Item Search function so you may logically navigate to any item. Vendors must be registered in eVA (which interfaces into Cardinal) in order to receive contract awards or purchase orders.

There are two categories of NIGP numbers or Class Code (represented by 1<sup>st</sup> three digits):

- 001 – 899 are used for Goods
- 900 – 999 are used for Services

The following is an example of the 10-digit NIGP code structure.

<u>Item ID</u>	<u>Categories</u>	<u>Description</u>
• <b>750</b>	Class	Road Materials Not Asphaltic
• <b>75077</b>	Item	Sand and Gravel
• <b>7507731</b>	Group	Gravel
• <b>7507731047</b>	Detail	No. 9 UOM=Ton

### Adding Items

The addition of a new NIGP number (item) is a two-step process. First, you need to determine if the item does not already exist in Cardinal. Second, add the new NIGP number if it does not currently exist. **If an item is specific to inventory (WebIMS), the item must be assigned an IMS Stock Number before it can be added to Cardinal.** Once WebIMS is updated, then an NIGP number can be assigned



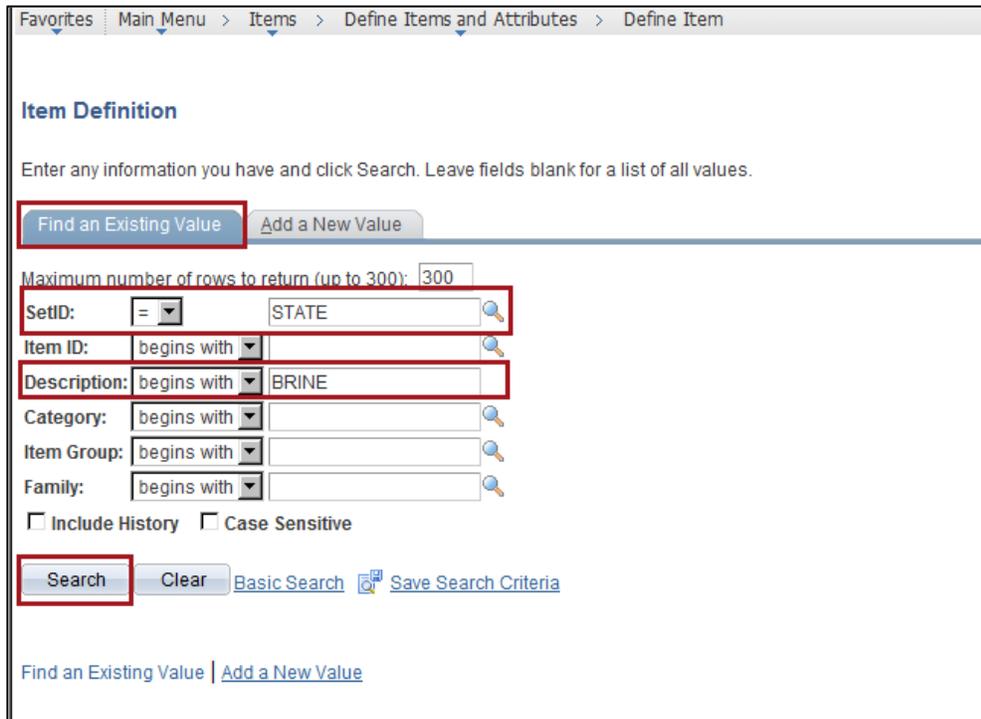
### TABLE OF CONTENTS

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### Searching for an Item:

- 1 Navigate using the following path:

**Main Menu > Items > Define Items and Attributes > Define Item**



- 2 Click the **Find an Existing Value** tab.
- 3 Ensure that **STATE** is listed in the **SetID** field.
- 4 In the **Description** field, enter the search term using the various search criteria available.
- 5 Click the **Search** button.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

Enter any information you have and click Search. Leave words blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Maximum number of rows to return (up to 300):

SetID: =

Item ID: begins with

Description: contains

Category: begins with

Item Group: begins with

Family: begins with

Include History  
  Correct History  
  Case Sensitive

[Search](#)   [Clear](#)  
 [Basic Search](#)  
 [Save Search Criteria](#)

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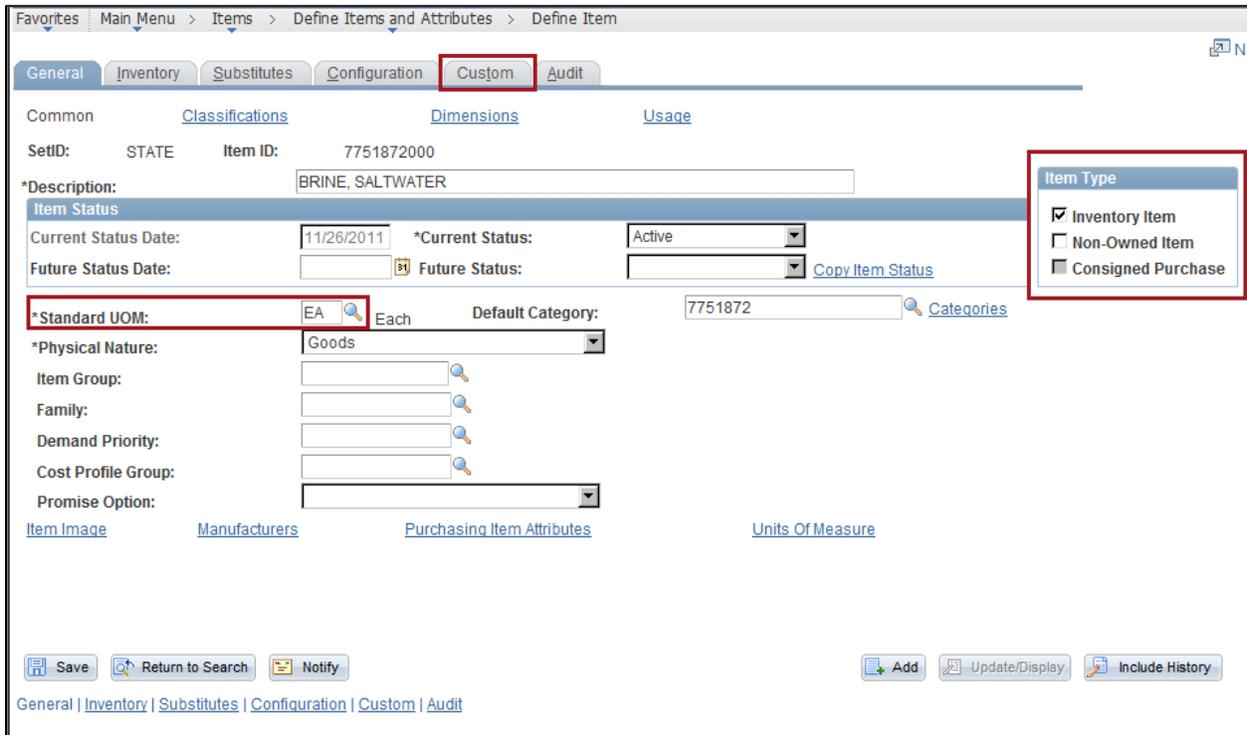
**Search Results**

View All First 1-2 of 2 Last

SetID	Item ID	Description	Category	Item Group	Family
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)
STATE	5456501000	SALT BRINE PRODUCTION EQUIPMEN	5456501	(blank)	(blank)

[Find an Existing Value](#) | [Add a New Value](#)

- A listing appears showing all items that match the search term(s). Select one of the items to view its attributes. By verifying the attributes of the displayed items, you will be able to verify the NIGP number (item) already exists in Cardinal.



The screenshot shows the 'Define Item' form in the Cardinal system. The 'Custom' tab is selected. The 'Standard UOM' field is set to 'EA' (Each). The 'Item Type' section has 'Inventory Item' checked. The 'Current Status' is 'Active'. The 'Description' is 'BRINE, SALTWATER'. The 'SetID' is 'STATE' and the 'Item ID' is '7751872000'. The 'Physical Nature' is 'Goods'. The 'Default Category' is '7751872'. The 'Item Group', 'Family', 'Demand Priority', 'Cost Profile Group', and 'Promise Option' fields are empty. The 'Item Status' section has 'Current Status Date' set to '11/26/2011' and 'Future Status Date' is empty. The 'Current Status' is 'Active' and 'Future Status' is empty. The 'Copy Item Status' link is visible. The 'Item Image', 'Manufacturers', 'Purchasing Item Attributes', and 'Units Of Measure' links are at the bottom. The 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History' buttons are at the bottom right. The breadcrumb trail is 'General | Inventory | Substitutes | Configuration | Custom | Audit'.

- 7 The **Standard UOM** field is the Standard Unit of Measure. It is the same in Cardinal, WebIMS, and interfaces to eVA.
- 8 The **Inventory Item** checkbox should be selected for all WebIMS related items. All others, select **Non-Owned Items** checkbox.
- 9 Click the **Custom** tab.

Favorites | Main Menu > Items > Define Items and Attributes > Define Item

General | Inventory | Substitutes | Configuration | Custom | Audit

Character Numeric

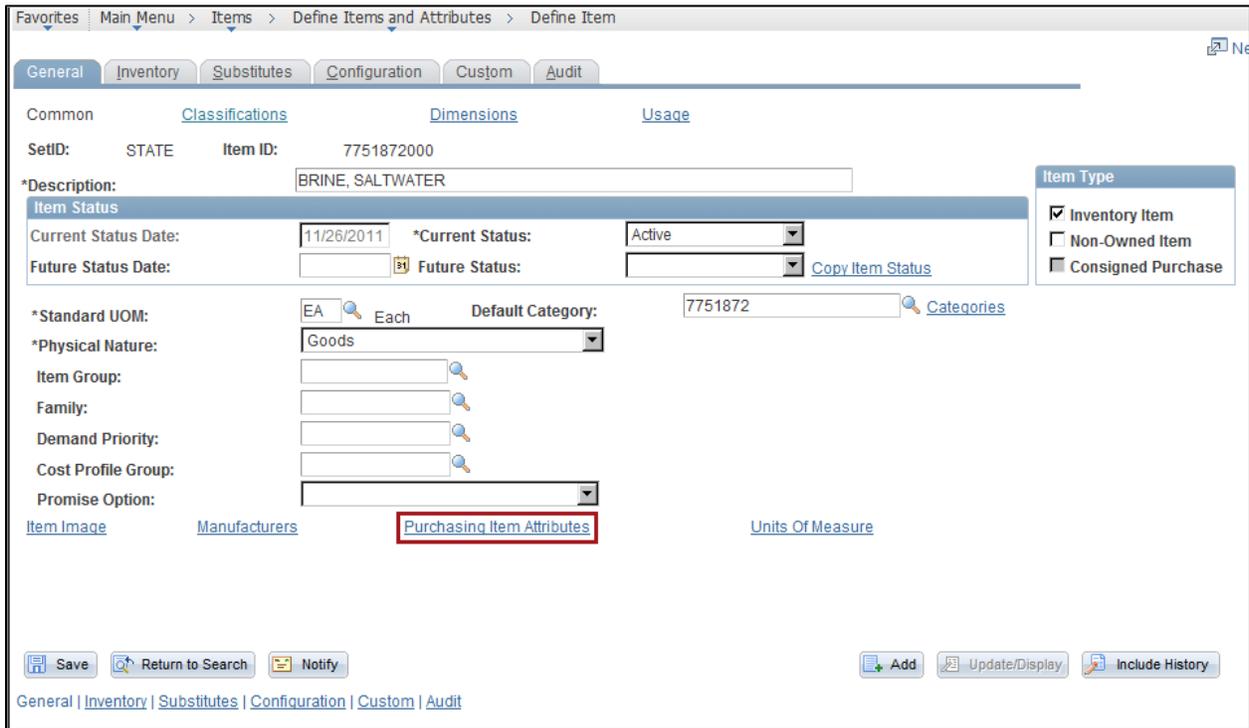
SetID: STATE      Item ID: 7751872000      Standard Unit of Measure: EA  
BRINE, SALTWATER

---

Item Fld C30 A:	<input type="text"/>	Item Fld C1 A:	<input type="checkbox"/>
Item Fld C30 B:	<input type="text"/>	Item Fld C1 B:	<input type="checkbox"/>
Item Fld C30 C:	<input type="text"/>	Item Fld C1 C:	<input type="checkbox"/>
Item Fld C30 D:	<input type="text"/>	Item Fld C1 D:	<input type="checkbox"/>
<b>WebIMS Item ID:</b>	<input type="text"/>	Item Fld C2:	<input type="checkbox"/>
Item Fld C10 B:	<input type="text"/>	Item Fld C4:	<input type="text"/>
Item Fld C10 C:	<input type="text"/>	Item Fld C6:	<input type="text"/>
Item Fld C10 D:	<input type="text"/>	Item Fld C8:	<input type="text"/>

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

- 10 If the **WebIMS Item ID** field is blank, the current item is not a WebIMS inventory item. If the item is a WebIMS-related item, a value is listed in the WebIMS Item ID field. A value in this field identifies this item as a WebIMS-related item.
- 11 Click the **General** tab.



The screenshot shows the 'Define Item' web application interface. The breadcrumb trail is 'Favorites > Main Menu > Items > Define Items and Attributes > Define Item'. The 'General' tab is selected, and the 'Purchasing Item Attributes' link is highlighted with a red box. The form contains the following fields and options:

- SetID:** STATE, **Item ID:** 7751872000
- \*Description:** BRINE, SALTWATER
- Item Status:**
  - Current Status Date:** 11/26/2011, **\*Current Status:** Active
  - Future Status Date:** [empty], **Future Status:** [empty], [Copy Item Status](#)
- \*Standard UOM:** EA Each, **Default Category:** 7751872 [Categories](#)
- \*Physical Nature:** Goods
- Item Group:** [empty]
- Family:** [empty]
- Demand Priority:** [empty]
- Cost Profile Group:** [empty]
- Promise Option:** [empty]

At the bottom of the form, there are buttons for [Save](#), [Return to Search](#), [Notify](#), [Add](#), [Update/Display](#), and [Include History](#). The breadcrumb trail at the bottom is 'General | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)'.

12 Click the **Purchasing Item Attributes** link.

Favorites | Main Menu > Items > Define Items and Attributes > Define Item

Purchasing Attributes | Purchasing Controls | Item Vendor

SetID: STATE Item ID: 7751872000 Standard Unit of Measure: EA

Description: BRINE, SALTWATER

PO Available Date: 01/01/1900

Unavailable:

Standard Price: 350.00000 EA

Last PO Price: 350.00000

\*Currency: USD Dollar

Lead Time Days:

\*Long Description: BRINE, SALTWATER BRINE, SALTWATER

\*Item Desc: BRINE, SALTWATER BRINE, SAL

Category: 7751872

Model:

Asset Profile ID:

Ultimate Use Code:

Physical Nature: Goods

Primary Buyer:

Associated Picture

File Name:

File Extension:

Chartfields

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

*Account	Task
5012550	

Item Specifications | Packing Details

VAT Default | VAT Service Treatment Setup

OK Cancel Apply

Purchasing Attributes | Purchasing Controls | Item Vendor

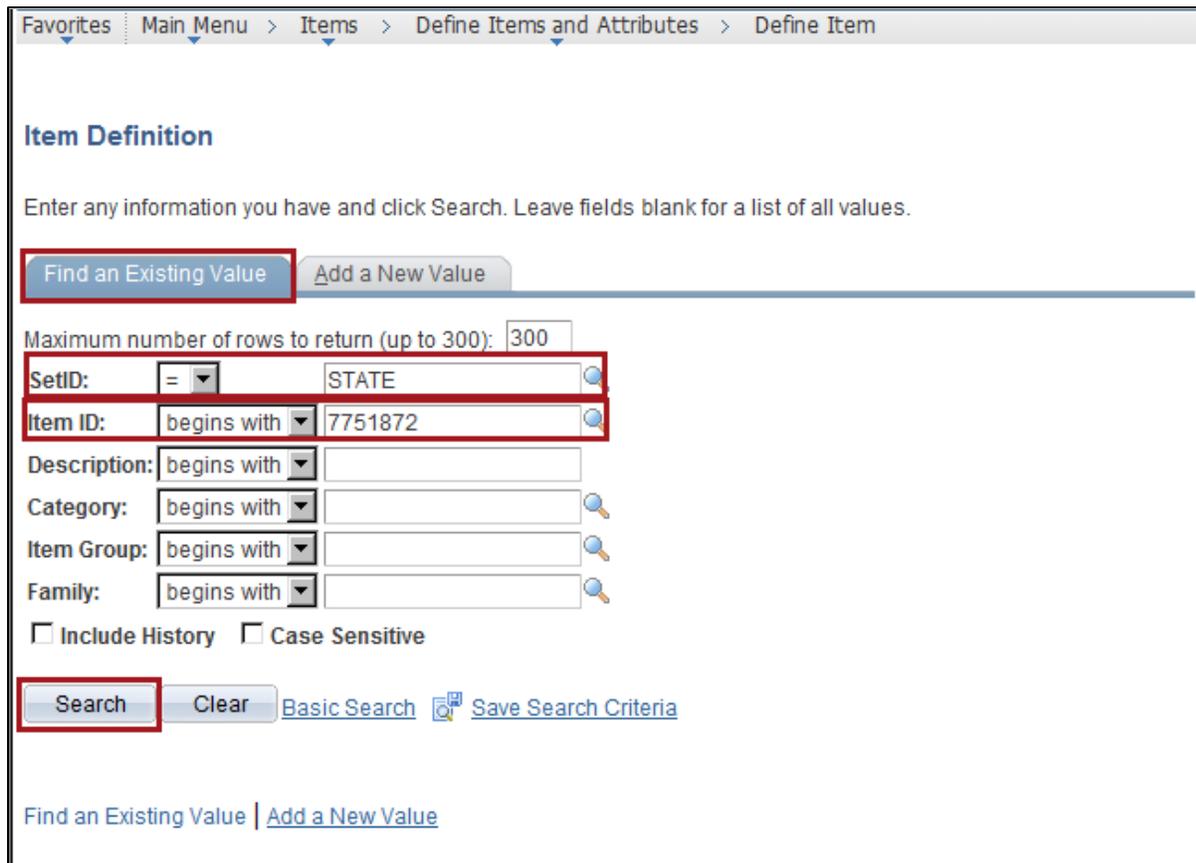
- 13 If the item is verified to be available respond back to the requester and provide the complete 10-digit NIGP number, the complete description of the item, and if the item is a WebIMS inventory item. The item is available if the **PO Available Date** field has a value that is in the past.
- 14 If you do not find an item in the tables, you have to create a new one. You may also need to create a new item, if the requester does not feel the existing item is specific for use.

### Adding a New NIGP Number (Item):

Only the Fiscal Inventory Manager can set up new items in Cardinal.

- 1 Navigate using the following path:

**Main Menu > Items > Define Items and Attributes > Define Item**



- 2 Click the **Find an Existing Value** tab.
- 3 In the **Item ID** field, enter the first five or seven digits of the general category from the previous search. This allows you to easily search for all items with this general category.
- 4 Click the **Search** button.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

### Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Maximum number of rows to return (up to 300):

SetID:  STATE

Item ID:  7751872

Description:

Category:

Item Group:

Family:

Include History |  Case Sensitive

|  | [Basic Search](#) |

#### Search Results

View All First  1-2 of 2  Last

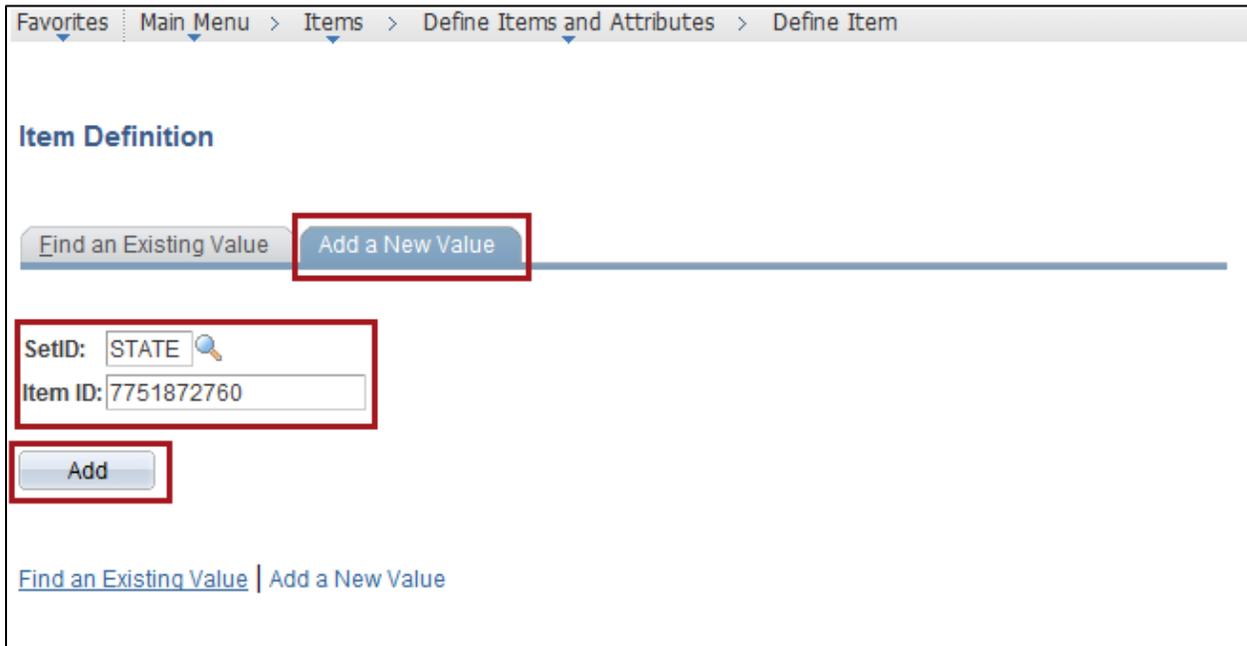
SetID	Item ID	Description	Category	Item Group	Family
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)
STATE	7751872150	420 LB./DRUM (CONTAINS 111 LBS	7751872	(blank)	(blank)

[Find an Existing Value](#) | [Add a New Value](#)

- 5 A complete listing of all items within the group displays. You need to determine if there is numbering space available in this general category. If there is, you can use this general category and assign the number the detail number (last 3 digits of the NIGP). Then you will have your complete 10-digit number for this new item.

- 6 Navigate using the following path:

**Main Menu > Items > Define Items and Attributes > Define Item**



Favorites Main Menu > Items > Define Items and Attributes > Define Item

### Item Definition

Find an Existing Value Add a New Value

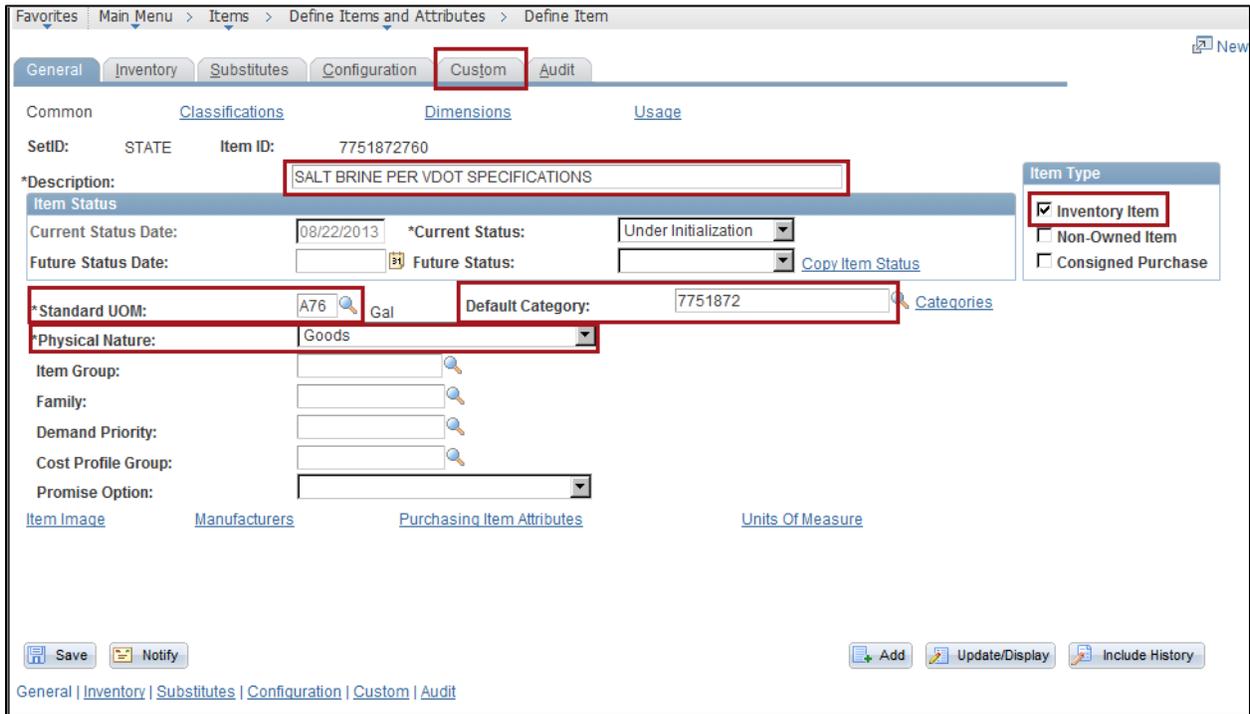
SetID: STATE 

Item ID: 7751872760

Add

[Find an Existing Value](#) | [Add a New Value](#)

- 7 Click the **Add a New Value** tab.
- 8 Ensure that **STATE** is listed in the **SetID** field.
- 9 Enter the new NIGP number in the **Item ID** field.
- 10 Click the **Add** button.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

General | Inventory | Substitutes | Configuration | **Custom** | Audit

Common | Classifications | Dimensions | Usage

SetID: STATE Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date: 08/22/2013 \*Current Status: Under Initialization

Future Status Date: Future Status: Copy Item Status

\*Standard UOM: A76 Gal Default Category: 7751872

\*Physical Nature: Goods

Item Group: Family: Demand Priority: Cost Profile Group: Promise Option:

Item Image | Manufacturers | Purchasing Item Attributes | Units Of Measure

Item Type

Inventory Item
   
 Non-Owned Item
   
 Consigned Purchase

Save | Notify | Add | Update/Display | Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

- 11 Verify the correct 10-digit NIGP number was entered. This is done by checking the **Item ID** number.
- 12 Enter/select valid values for the following required fields:
  - **Description**
  - **Standard UOM**
  - **Default Category**
  - **Physical Nature**
- 13 Select **Inventory Item** checkbox (only if the item is a WebIMS item). All others, select **Non-Owned Item**.
- 14 Click the **Custom** tab.

Favorites | Main Menu > Items > Define Items and Attributes > Define Item

**General** | Inventory | Substitutes | Configuration | Custom | Audit

Character Numeric

SetID: STATE      Item ID: 7751872760      Standard Unit of Measure: A76  
SALT BRINE PER VDOT SPECIFICATIONS

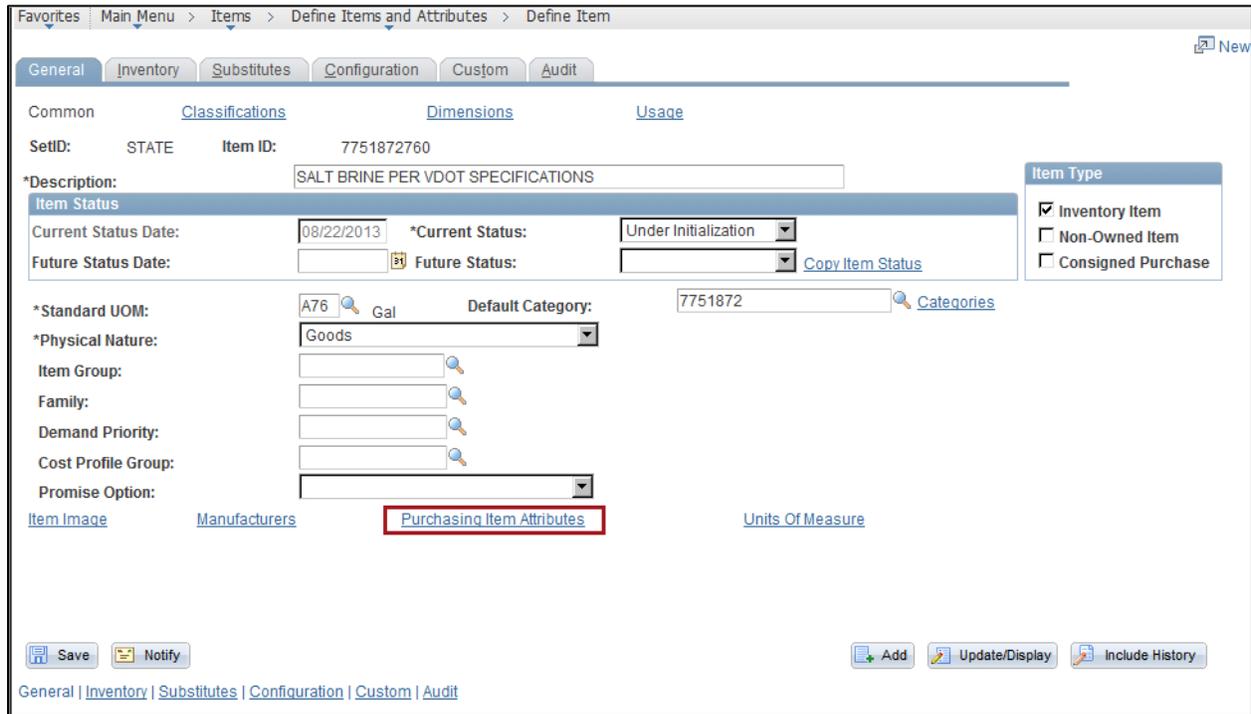
---

Item Fld C30 A:	<input type="text"/>	Item Fld C1 A:	<input type="checkbox"/>
Item Fld C30 B:	<input type="text"/>	Item Fld C1 B:	<input type="checkbox"/>
Item Fld C30 C:	<input type="text"/>	Item Fld C1 C:	<input type="checkbox"/>
Item Fld C30 D:	<input type="text"/>	Item Fld C1 D:	<input type="checkbox"/>
<b>WebIMS Item ID:</b>	<b>240004972</b>	Item Fld C2:	<input type="checkbox"/>
Item Fld C10 B:	<input type="text"/>	Item Fld C4:	<input type="text"/>
Item Fld C10 C:	<input type="text"/>	Item Fld C6:	<input type="text"/>
Item Fld C10 D:	<input type="text"/>	Item Fld C8:	<input type="text"/>

**Save** | Notify | Add | Update/Display | Include History

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

- 15 Enter the **WebIMS Item ID** (stock number), if the item is an inventory item. If this is not an inventory item, leave this field blank.
- 16 Click the **Save** button.
- 17 Click the **General** tab.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

General | Inventory | Substitutes | Configuration | Custom | Audit

Common | Classifications | Dimensions | Usage

SetID: STATE Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date: 08/22/2013 \*Current Status: Under Initialization

Future Status Date: Future Status: Copy Item Status

\*Standard UOM: A76 Gal Default Category: 7751872 Categories

\*Physical Nature: Goods

Item Group: Family: Demand Priority: Cost Profile Group: Promise Option:

[Item Image](#) [Manufacturers](#) **[Purchasing Item Attributes](#)** [Units Of Measure](#)

Save Notify Add Update/Display Include History

General | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

**18** Click the **Purchasing Items Attributes** link.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)
New

[Purchasing Attributes](#) | **[Purchasing Controls](#)** | [Item Vendor](#)

SetID: STATE    Item ID: 7751872760    Standard Unit of Measure: A76  
 Description: SALT BRINE PER VDOT SPECIFICATIONS

**PO Available Date:** 08/22/2013   
**Unavailable:** 12/31/2999   
**Standard Price:** .01 A76  
 Last PO Price:

\*Currency: USD  Dollar  
 Lead Time Days:

\*Item Desc: SALT BRINE PER VDOT SPECIFICAT SALT BRINE  
 Category: 7751872  
 Model:   
 Asset Profile ID:   
 Ultimate Use Code:   
 Physical Nature: Goods  
 Primary Buyer:

**\*Long Description:**  
 SALT BRINE PER VDOT SPECIFICATIONS

**Associated Picture**  
 File Name:   
 File Extension:

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

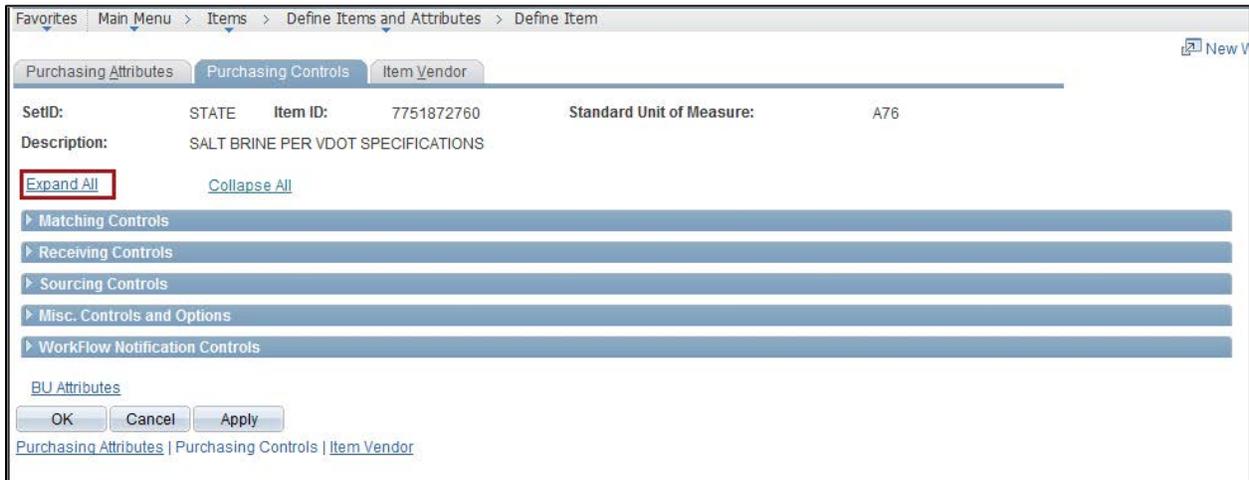
**\*Account**    Task  
 5012550   

[Item Specifications](#)    [Packing Details](#)  
[VAT Default](#)    [VAT Service Treatment Setup](#)

[Purchasing Attributes](#) | [Purchasing Controls](#) | [Item Vendor](#)

- 19 The **PO Available Date** will default in today's date. Do not change this value.
- 20 In the **Unavailable Date** field, always enter **12/31/2999**.
- 21 In the **Standard Price** field, always enter **.01** (one cent).
- 22 In the ChartFields section, an **Account** value may default. If an **Account** values does not default, then you need to enter a value.
- 23 If the description was shortened, enter the full (long) description into the **Long Description** field.
- 24 Click the **Purchasing Controls** tab.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

Purchasing Attributes | **Purchasing Controls** | Item Vendor

SetID: STATE Item ID: 7751872760 Standard Unit of Measure: A76

Description: SALT BRINE PER VDOT SPECIFICATIONS

[Expand All](#) [Collapse All](#)

- ▶ Matching Controls
- ▶ Receiving Controls
- ▶ Sourcing Controls
- ▶ Misc. Controls and Options
- ▶ WorkFlow Notification Controls

BU Attributes

OK Cancel Apply

[Purchasing Attributes](#) | [Purchasing Controls](#) | [Item Vendor](#)

- 25** All data control areas are collapsed on this panel group. Click the **Expand All** link to see all available fields.

Favorites | Main Menu > Items > Define Items and Attributes > Define Item

Purchasing Attributes | Purchasing Controls | Item Vendor

SetID: STATE Item ID: 7751872760 Standard Unit of Measure: A76  
 Description: SALT BRINE PER VDOT SPECIFICATIONS

[Expand All](#) [Collapse All](#)

**Matching Controls**

	Tolerance Over	Tolerance Under
Unit Price Tolerance:	0.00000	0.00000
% Unit Price Tolerance:	0.01	999.99
Ext Price Tolerance:	0.00000	0.00000
% Ext Price Tolerance:	10.50	999.99

**Receiving Controls**

\*Receiving Required: Required  Inspection Required  
 Reject Qty Over Tolerance Inspect Sample Percent: 0.00  
 Qty Rcvd Tolerance %: 10.00 \*Inspection UOM: Standard  
 \*Partial Qty: Recvd/Warn Inspect ID:  
 Early Ship Reject Days: 2

**Sourcing Controls**

Use Category Sourcing Controls \*Sourcing Method: Basic  
 Lead Time Factor %: 0.00 Ship to Priority Factor %: 0.00  
 Price Factor %: 0.00 Vendor Priority Factor %: 0.00

**Misc. Controls and Options**

Auto Select  Contract Required  
 Accept Any Vendor  RFQ Required  
 Accept Any Ship To  Stockless Item  
 Available in All Regions  Taxable  
 Close PO Under Percent Tol: Include in Planning  
 Ship Via:

**WorkFlow Notification Controls**

	Tolerance Over	Tolerance Under
Unit Price Tolerance:	99999999.00000	99999999.00000
% Unit Price Tolerance:	999.00	999.00

[BU Attributes](#)

OK Cancel Apply

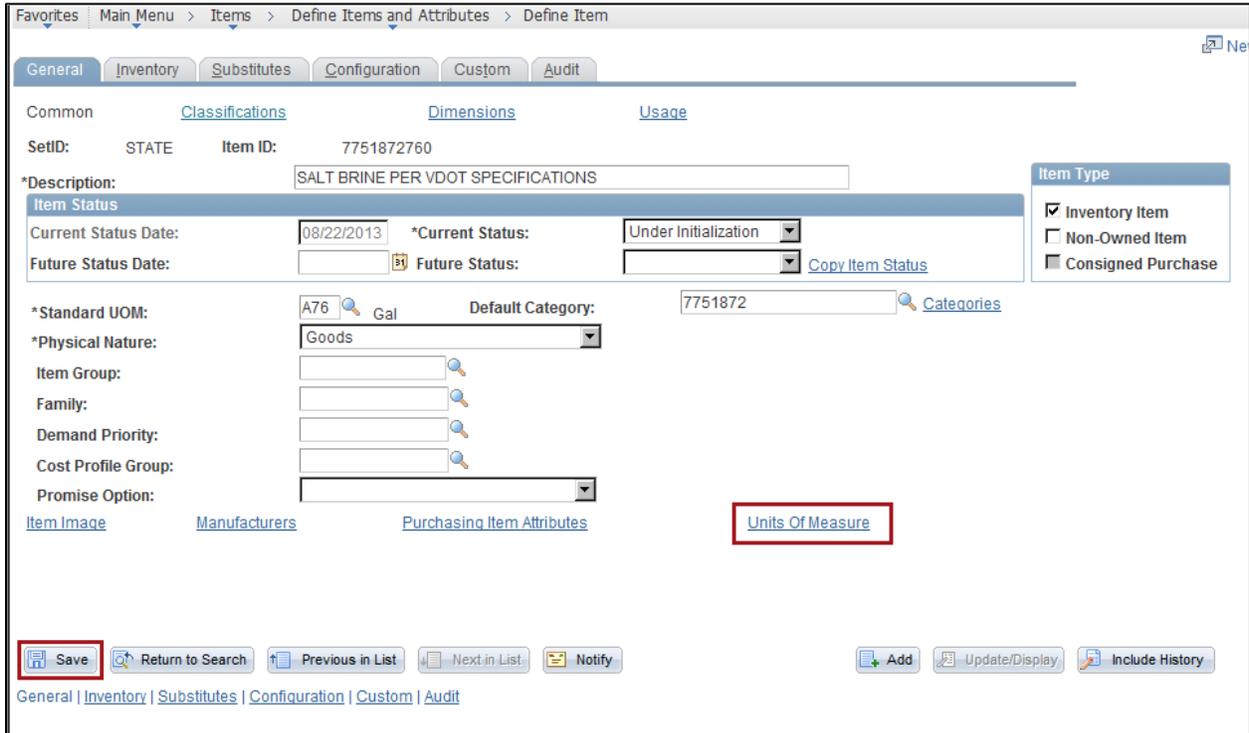
[Purchasing Attributes](#) | [Purchasing Controls](#) | [Item Vendor](#)

**26 Note:** Some fields will default in and are grayed out. You need to enter valid values in required fields, as applicable.

- **Unit Price Tolerance** field defaults to **0.00** for bulk items. Non-bulk items may have none.
- **Ext Price Tolerance** field defaults to **0.00** for bulk items.
- **Receiving Required** drop down menu should always be set to **Required**.
- **Qty Rcvd Tolerance %** field set to **10** for bulk commodities. All others are set to **0**.

**27** Click the **Apply** button.

**28** Click the **OK** button.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

General | Inventory | Substitutes | Configuration | Custom | Audit

Common | Classifications | Dimensions | Usage

SetID: STATE Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date: 08/22/2013 \*Current Status: Under Initialization

Future Status Date: Future Status: Copy Item Status

\*Standard UOM: A76 Gal Default Category: 7751872 Categories

\*Physical Nature: Goods

Item Group: Family: Demand Priority: Cost Profile Group: Promise Option:

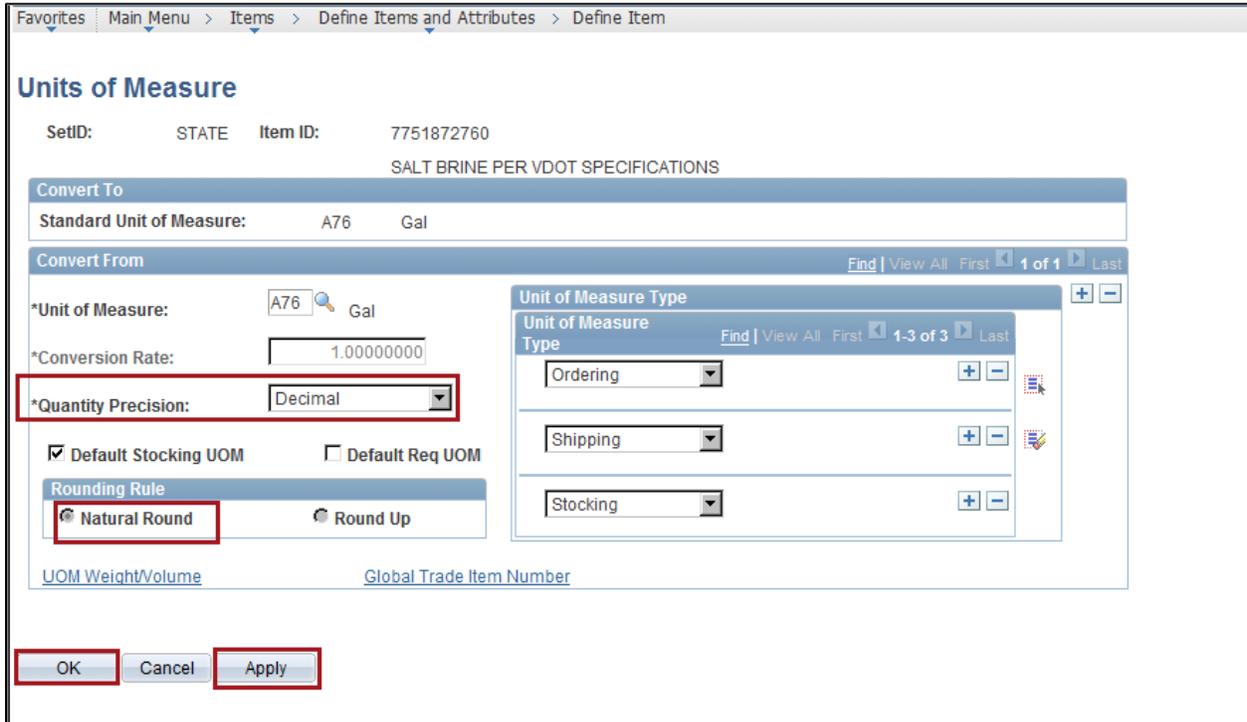
[Item Image](#) [Manufacturers](#) [Purchasing Item Attributes](#) [Units Of Measure](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#)

General | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

29 The **General** tab displays. Click the **Save** button.

30 If the item can be received and accepted in fractions, click the **Units of Measure** link.



Units of Measure

SetID: STATE Item ID: 7751872760  
SALT BRINE PER VDOT SPECIFICATIONS

Convert To  
Standard Unit of Measure: A76 Gal

Convert From  
Find | View All First 1 of 1 Last

\*Unit of Measure: A76 Gal  
\*Conversion Rate: 1.00000000  
\*Quantity Precision: Decimal

Default Stocking UOM  Default Req UOM

Rounding Rule  
 Natural Round  Round Up

Unit of Measure Type  
Find | View All First 1-3 of 3 Last

Ordering  
Shipping  
Stocking

UOM Weight/Volume Global Trade Item Number

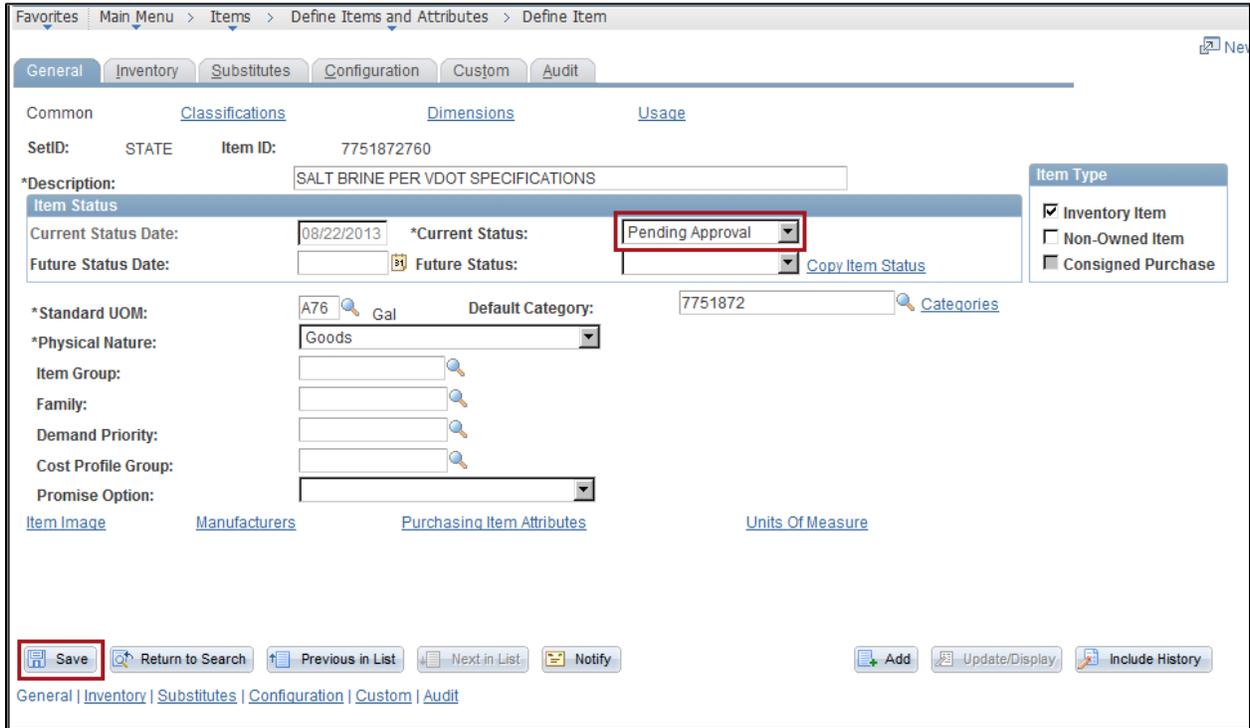
OK Cancel Apply

**31** In the **Quantity Precision** drop down menu, select **Decimal**.

**Note:** **Rounding Rule** should always be **Natural Round**.

**32** Click the **Apply** button.

**33** Click the **OK** button.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

General | Inventory | Substitutes | Configuration | Custom | Audit

Common | Classifications | Dimensions | Usage

SetID: STATE Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date: 08/22/2013 \*Current Status: Pending Approval

Future Status Date: Future Status: Copy Item Status

\*Standard UOM: A76 Gal Default Category: 7751872 Categories

\*Physical Nature: Goods

Item Group: Family: Demand Priority: Cost Profile Group: Promise Option:

Item Image | Manufacturers | Purchasing Item Attributes | Units Of Measure

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

- 34 The General tab displays. Click the **Save** button.
- 35 Select **Pending Approval** from the **Current Status** drop down menu.
- 36 Click the **Save** button.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

[Common](#) | [Classifications](#) | [Dimensions](#) | [Usage](#)

SetID: STATE    Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**

Current Status Date: 08/22/2013    \*Current Status: Active

Future Status Date:    Future Status:    [Copy Item Status](#)

\*Standard UOM: A76 Gal    Default Category: 7751872 [Categories](#)

\*Physical Nature: Goods

Item Group:    Family:    Demand Priority:    Cost Profile Group:    Promise Option:

[Item Image](#)    [Manufacturers](#)    [Purchasing Item Attributes](#)    [Units Of Measure](#)

[Save](#)    [Return to Search](#)    [Previous in List](#)    [Next in List](#)    [Notify](#)    [Add](#)    [Update/Display](#)    [Include History](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

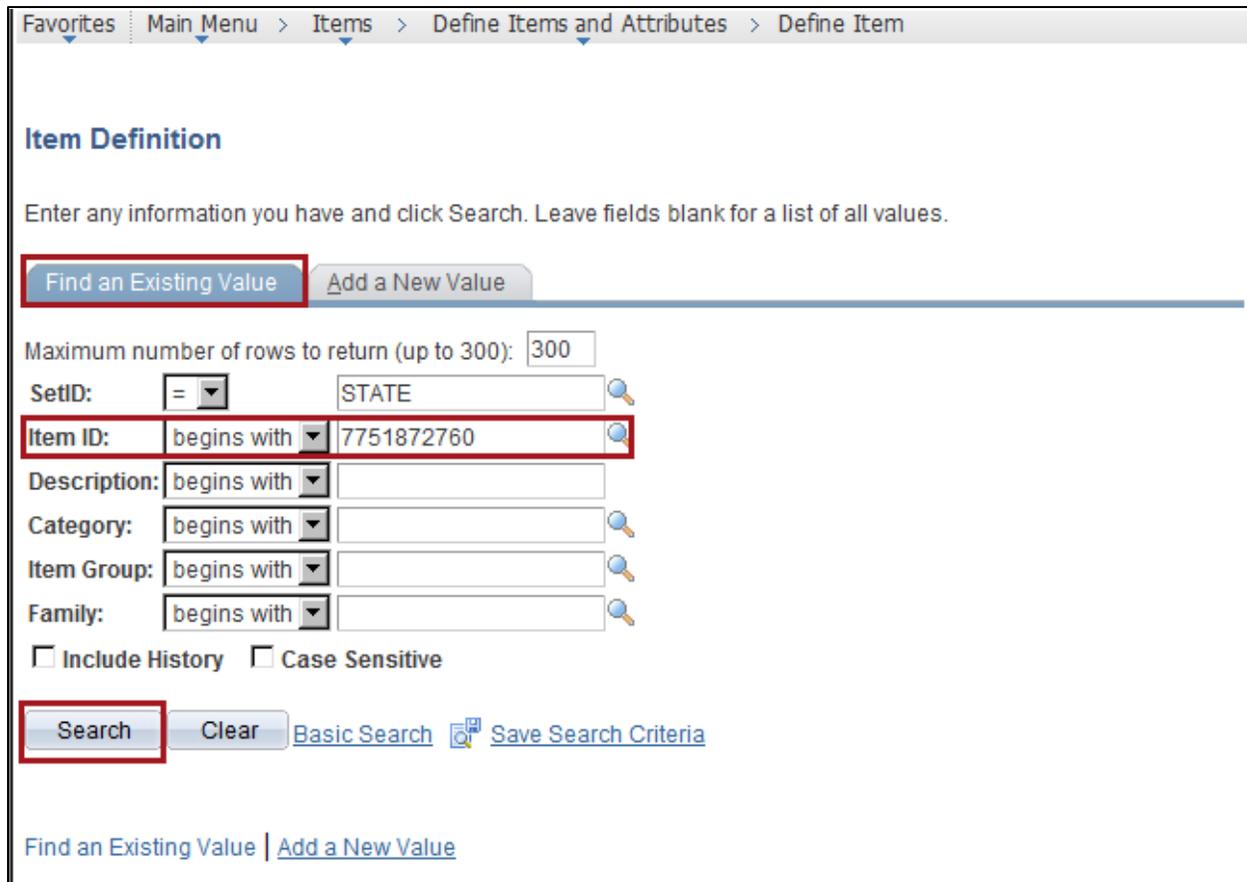
- 37 The **Current Status** changes from **Pending Approval** to **Active**. Your entries are saved and the process is complete.

### Establishing Vendor / Item Relationship (Set-Up):

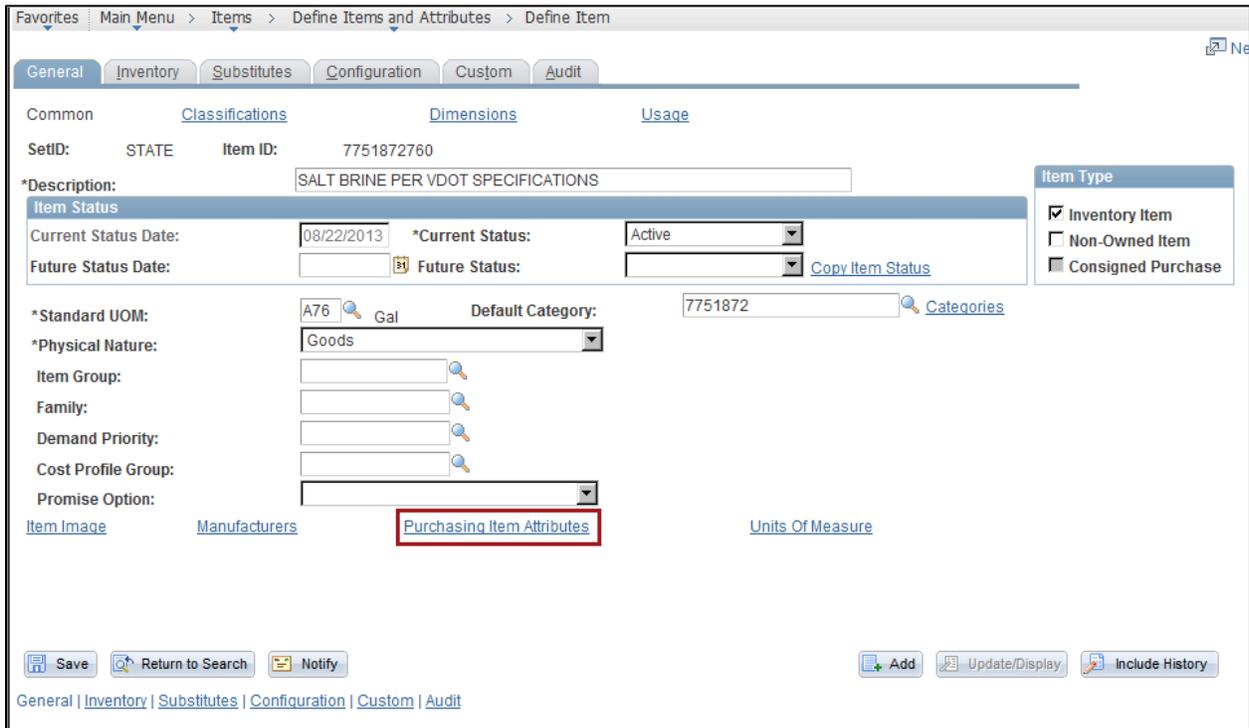
Once a new NIGP number is created in Cardinal, the vendor/item relationship needs to be established in Cardinal.

- 1 Navigate using the following path:

**Main Menu > Items > Define Items and Attributes > Define Item**

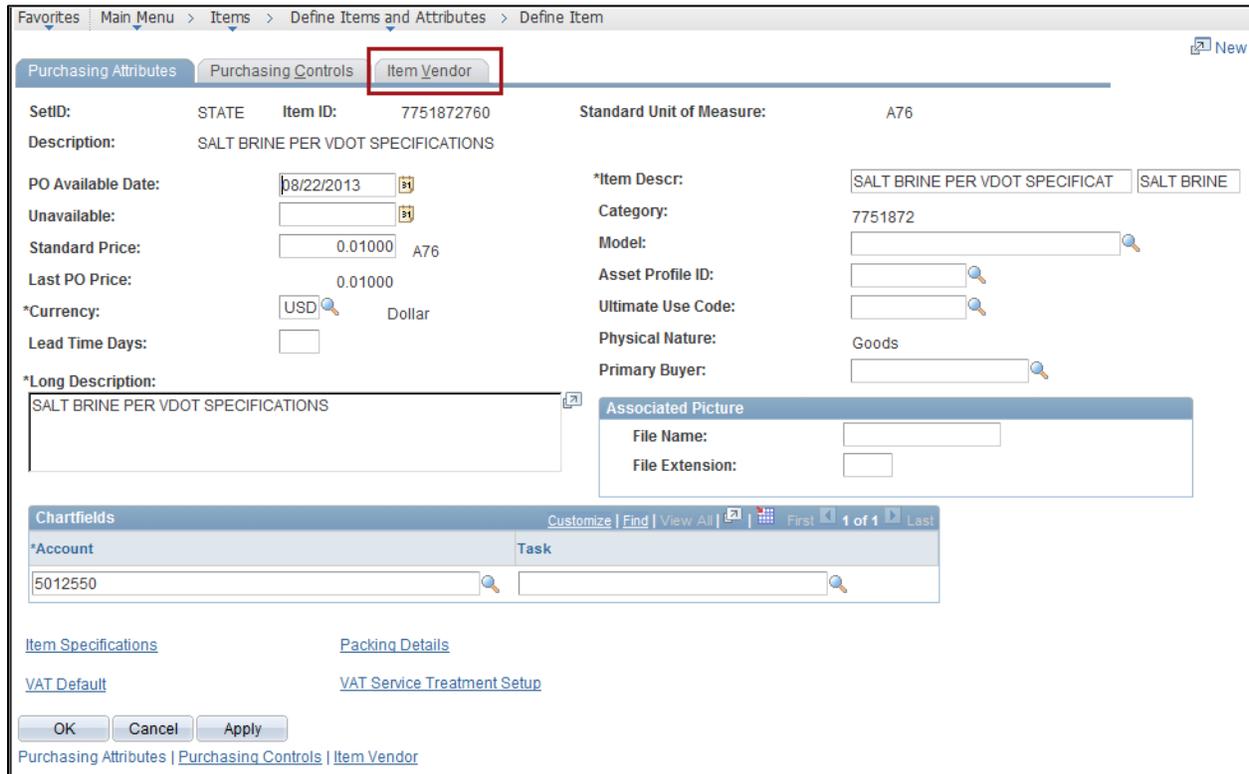


- 2 Click the **Find an Existing Value** tab.
- 3 Enter the **Item ID** in the search criteria.
- 4 Click the **Search** button.



The screenshot shows the 'Define Item' web application interface. The breadcrumb navigation is 'Favorites > Main Menu > Items > Define Items and Attributes > Define Item'. The 'General' tab is selected, and the 'Common' sub-tab is active. The 'Item ID' is 7751872760 and the description is 'SALT BRINE PER VDOT SPECIFICATIONS'. The 'Item Status' section shows 'Current Status' as 'Active' and 'Current Status Date' as '08/22/2013'. The 'Standard UOM' is 'A76 Gal' and the 'Default Category' is '7751872'. The 'Physical Nature' is 'Goods'. The 'Purchasing Item Attributes' link is highlighted with a red box. The 'Item Type' section has 'Inventory Item' checked. The bottom navigation bar includes 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History' buttons.

- 5 Click the **Purchasing Item Attributes** link.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

Purchasing Attributes | Purchasing Controls | **Item Vendor** New

SetID: STATE Item ID: 7751872760 Standard Unit of Measure: A76

Description: SALT BRINE PER VDOT SPECIFICATIONS

PO Available Date: 08/22/2013

Unavailable:

Standard Price: 0.01000 A76

Last PO Price: 0.01000

\*Currency: USD Dollar

Lead Time Days:

\*Long Description: SALT BRINE PER VDOT SPECIFICATIONS

\*Item Desc: SALT BRINE PER VDOT SPECIFICAT SALT BRINE

Category: 7751872

Model:

Asset Profile ID:

Ultimate Use Code:

Physical Nature: Goods

Primary Buyer:

Associated Picture

File Name:

File Extension:

Chartfields

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

*Account	Task
5012550	

[Item Specifications](#) [Packing Details](#)

[VAT Default](#) [VAT Service Treatment Setup](#)

OK Cancel Apply

Purchasing Attributes | Purchasing Controls | Item Vendor

6 Click the **Item Vendor** tab.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

[Purchasing Attributes](#) | [Purchasing Controls](#) | [Item Vendor](#)

SetID: STATE    Item ID: 7751872760    Standard Unit of Measure: A76  
 Description: SALT BRINE PER VDOT SPECIFICATIONS

**Vendor Priorities**

**Item Vendor** Find | View All | First | 1 of 1 | Last

\*Vendor SetID: STATE [Vendor Lookup](#)    \*Status: Active    
 \*Vendor ID: 0000031025 [Vendor Lookup](#)    B P Short & Son Paving Co Inc    \*Priority: 1  
 Allocation %: 0     Include in Planning  
 Vendor's Catalog:   
 Vendor Item ID:   
 Item Extension:   
 Description:

**Associated Picture**

**Vendor Attributes** Find | View All | First | 1 of 1 | Last

\*Price Loc: MAIN   Accept Any UOM  
 \*Price Date: PO   Accept Any Ship To  
 \*Price Qty: Line Quantity   Price Can Be Changed on Order  
 Origin Country:   Use Item Standard Lead Time  
 Region of Origin:     Lead Time Days:

[Item Vendor UOM](#)    [Vendor Item MFG](#)  
[Return to Vendor Fees](#)    [Item Vendor Contracts](#)

[Purchasing Attributes](#) | [Purchasing Controls](#) | [Item Vendor](#)

7 Enter or verify that the **Vendor SetID** is **STATE**.

8 Enter or select the **Vendor ID** (as applicable).

9 Click the **Item Vendor UOM** link.



[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

[Purchasing Attributes](#) | [Purchasing Controls](#) | **Item Vendor**

SetID: STATE    Item ID: 7751872760    Standard Unit of Measure: A76  
 Description: SALT BRINE PER VDOT SPECIFICATIONS

**Vendor Priorities**

**Item Vendor** Find | View All | First | 1 of 1 | Last

\*Vendor SetID: STATE  [Vendor Lookup](#)    \*Status: Active     
 \*Vendor ID: 0000031025  B P Short & Son Paving Co Inc    \*Priority: 1  
 Allocation %:      Include in Planning  
 Vendor's Catalog:   
 Vendor Item ID:   
 Item Extension:   
 Description:

**Associated Picture**

**Vendor Attributes** Find | View All | First | 1 of 1 | Last

\*Price Loc: MAIN   Accept Any UOM  
 \*Price Date: PO   Accept Any Ship To  
 \*Price Qty: Line Quantity   Price Can Be Changed on Order  
 Origin Country:   Use Item Standard Lead Time  
 Region of Origin:     Lead Time Days:

**Order Multiples**

Check Order Multiples

**Rounding Rule**

Natural Round

Round Up

[Item Vendor UOM](#)    [Vendor Item MFG](#)  
[Return to Vendor Fees](#)    [Item Vendor Contracts](#)

[Purchasing Attributes](#) | [Purchasing Controls](#) | [Item Vendor](#)

**14** The Item Vendor tab displays. Click the **Apply** button.

**15** Click the **OK** button.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

[Common](#) | [Classifications](#) | [Dimensions](#) | [Usage](#)

SetID: STATE    Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**  
 Current Status Date: 08/22/2013    \*Current Status: Active  
 Future Status Date:    Future Status:    [Copy Item Status](#)

\*Standard UOM: A76 Gal    Default Category: 7751872 [Categories](#)

\*Physical Nature: Goods  
 Item Group:    Family:    Demand Priority:    Cost Profile Group:    Promise Option:

[Item Image](#)    [Manufacturers](#)    [Purchasing Item Attributes](#)    [Units Of Measure](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

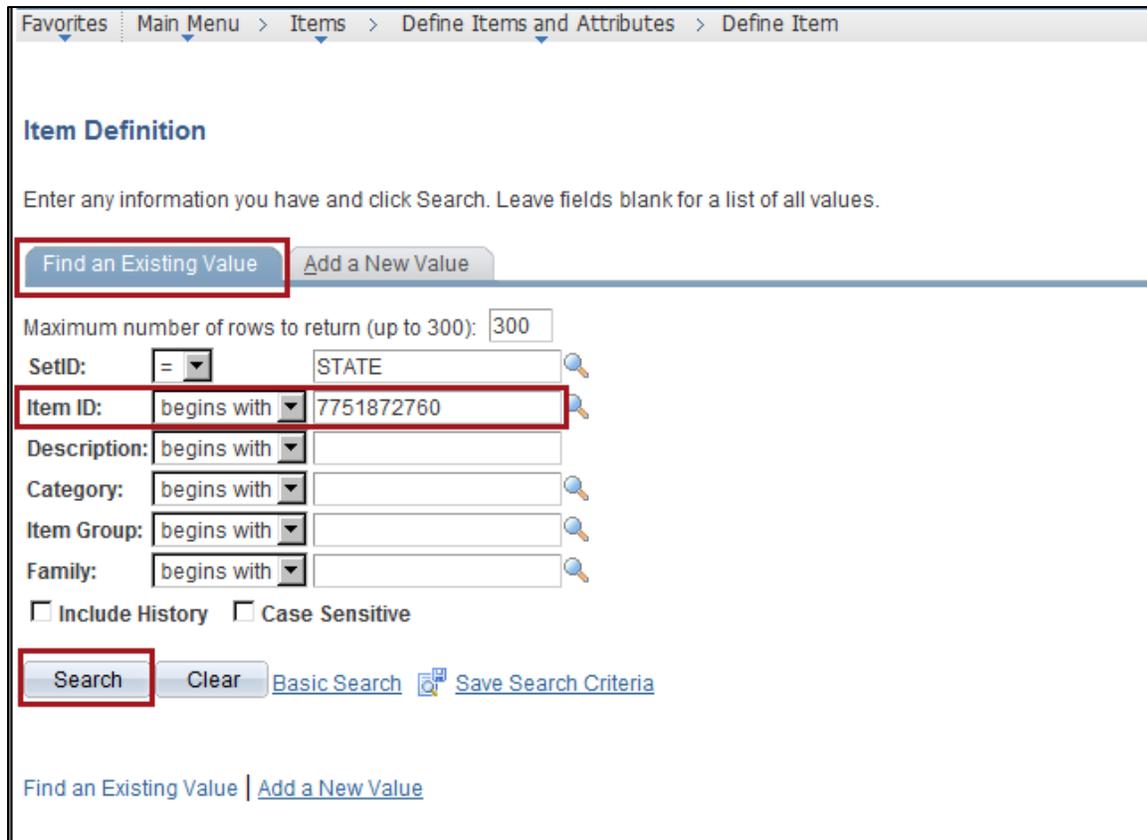
- 16 The General tab displays. Click the **Save** button. Your entries are saved and the process is complete.

### Changing / Inactivating an Item:

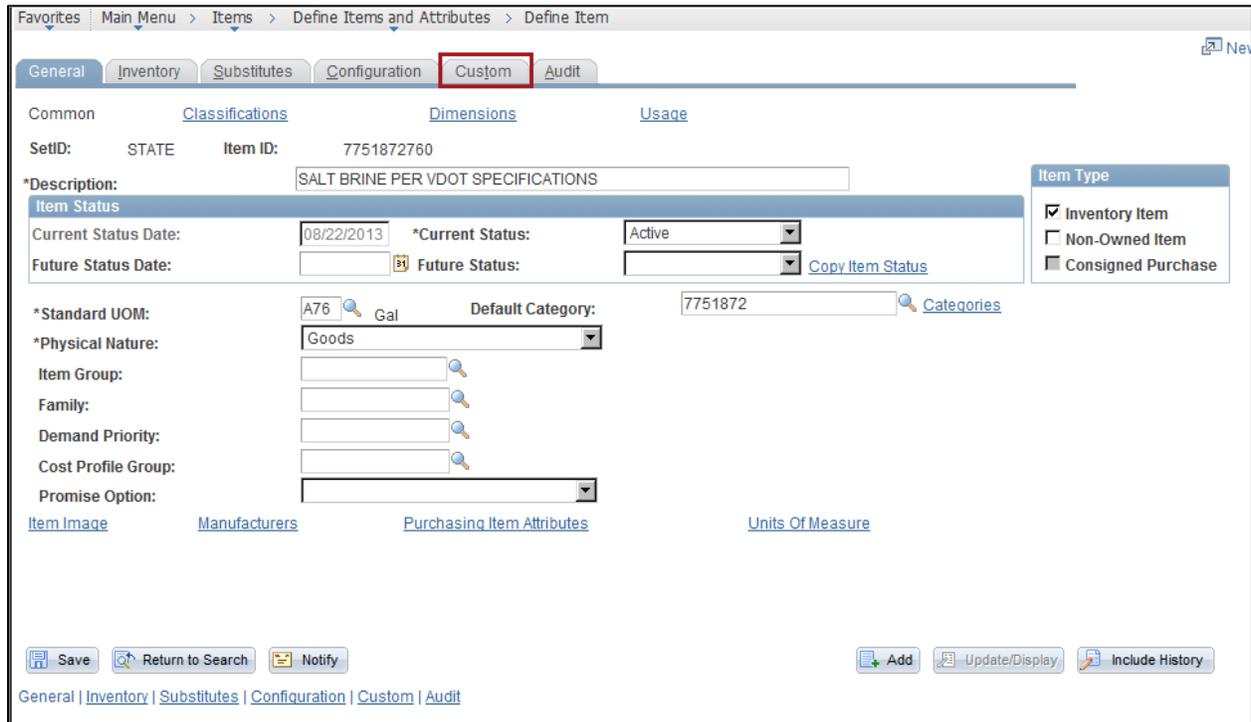
Once an NIGP number is entered (saved), the number cannot be modified or deleted. You can only make changes, inactivate, and in some cases reactivate the NIGP item data.

- 1 Navigate using the following path:

**Main Menu > Items > Define Items and Attributes > Define Item**



- 2 Click the **Find an Existing Value** tab.
- 3 Enter the NIGP number you want to search for in the **Item ID** field.
- 4 Click the **Search** button.



Favorites | Main Menu > Items > Define Items and Attributes > Define Item

General | Inventory | Substitutes | Configuration | **Custom** | Audit

Common | [Classifications](#) | [Dimensions](#) | [Usage](#)

SetID: STATE Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

Item Status

Current Status Date: 08/22/2013 \*Current Status: Active

Future Status Date: Future Status: Copy Item Status

\*Standard UOM: A76 Gal Default Category: 7751872 Categories

\*Physical Nature: Goods

Item Group: Family: Demand Priority: Cost Profile Group: Promise Option:

[Item Image](#) | [Manufacturers](#) | [Purchasing Item Attributes](#) | [Units Of Measure](#)

Save | Return to Search | Notify | Add | Update/Display | Include History

General | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

5 The **General** tab is displayed. Click the **Custom** tab.

Favorites | Main Menu > Items > Define Items and Attributes > Define Item

**General** | Inventory | Substitutes | Configuration | Custom | Audit

Character [Numeric](#)

SetID: STATE      Item ID: 7751872760      Standard Unit of Measure: A76

SALT BRINE PER VDOT SPECIFICATIONS

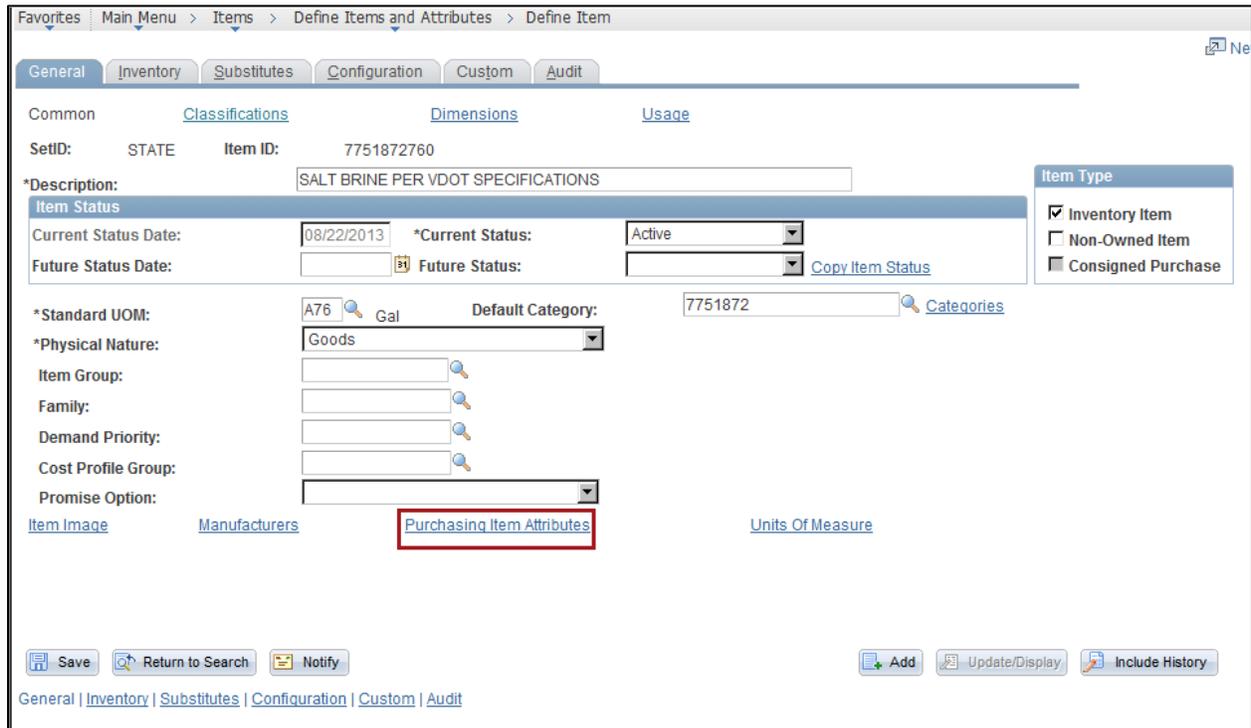
---

Item Fld C30 A:	<input type="text"/>	Item Fld C1 A:	<input type="checkbox"/>
Item Fld C30 B:	<input type="text"/>	Item Fld C1 B:	<input type="checkbox"/>
Item Fld C30 C:	<input type="text"/>	Item Fld C1 C:	<input type="checkbox"/>
Item Fld C30 D:	<input type="text"/>	Item Fld C1 D:	<input type="checkbox"/>
<b>WebIMS Item ID:</b>	<input type="text"/>	Item Fld C2:	<input type="checkbox"/>
Item Fld C10 B:	<input type="text"/>	Item Fld C4:	<input type="text"/>
Item Fld C10 C:	<input type="text"/>	Item Fld C6:	<input type="text"/>
Item Fld C10 D:	<input type="text"/>	Item Fld C8:	<input type="text"/>

**Save** | [Return to Search](#) | [Notify](#) | [Add](#) | [Update/Display](#) | [Include History](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

- 6 Remove the **WebIMS Item ID** value (stock number).
- 7 Click the **Save** button.
- 8 Click the **General** tab.



The screenshot shows the 'Define Item' web interface. The breadcrumb trail is 'Favorites > Main Menu > Items > Define Items and Attributes > Define Item'. The 'General' tab is selected, with sub-tabs for 'Inventory', 'Substitutes', 'Configuration', 'Custom', and 'Audit'. The 'Common' section contains fields for 'SetID: STATE' and 'Item ID: 7751872760'. The '\*Description:' field contains 'SALT BRINE PER VDOT SPECIFICATIONS'. The 'Item Status' section includes 'Current Status Date: 08/22/2013', '\*Current Status: Active', 'Future Status Date:', and 'Future Status:'. The '\*Standard UOM:' is 'A76 Gal' and 'Default Category:' is '7751872'. The '\*Physical Nature:' is 'Goods'. Below these are fields for 'Item Group:', 'Family:', 'Demand Priority:', 'Cost Profile Group:', and 'Promise Option:'. At the bottom of the form, there are links for 'Item Image', 'Manufacturers', 'Purchasing Item Attributes' (highlighted with a red box), and 'Units Of Measure'. The footer contains buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History', along with a breadcrumb trail: 'General | Inventory | Substitutes | Configuration | Custom | Audit'.

- 9 If the item should be removed from both inventory and non-inventory, click the **Purchasing Item Attributes** link.

Favorites | Main Menu > Items > Define Items and Attributes > Define Item

Purchasing Attributes | Purchasing Controls | Item Vendor

SetID: STATE Item ID: 7751872760 Standard Unit of Measure: A76  
Description: SALT BRINE PER VDOT SPECIFICATIONS

PO Available Date: 08/22/2013 [X]  
Unavailable: 08/22/2013 [X]

Standard Price: 0.01000 A76  
Last PO Price: 0.01000  
\*Currency: USD Dollar  
Lead Time Days:

\*Long Description: SALT BRINE PER VDOT SPECIFICATIONS

\*Item Descr: SALT BRINE PER VDOT SPECIFICAT SALT BRINE  
Category: 7751872  
Model:   
Asset Profile ID:   
Ultimate Use Code:   
Physical Nature: Goods  
Primary Buyer:

Associated Picture  
File Name:   
File Extension:

Chartfields Customize | Find | View All | First 1 of 1 Last  
\*Account 5012550 Task

[Item Specifications](#) [Packing Details](#)  
[VAT Default](#) [VAT Service Treatment Setup](#)

OK Cancel Apply

Purchasing Attributes | Purchasing Controls | Item Vendor

- 10 Change the **Unavailable** field date value to today's date.
- 11 Click the **Apply** button.
- 12 Click the **OK** button.

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Item](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

[Common](#) | [Classifications](#) | [Dimensions](#) | [Usage](#)

SetID: STATE    Item ID: 7751872760

\*Description: SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**

Current Status Date: 08/22/2013    \*Current Status: Active

**Future Status Date: 08/23/2013**    **Future Status: Inactive**    [Copy Item Status](#)

\*Standard UOM: A76 Gal    Default Category: 7751872 [Categories](#)

\*Physical Nature: Goods

Item Group:  [Search](#)  
 Family:  [Search](#)  
 Demand Priority:  [Search](#)  
 Cost Profile Group:  [Search](#)  
 Promise Option:

[Item Image](#)    [Manufacturers](#)    [Purchasing Item Attributes](#)    [Units Of Measure](#)

[Save](#)    [Return to Search](#)    [Notify](#)

[Add](#)    [Update/Display](#)    [Include History](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Configuration](#) | [Custom](#) | [Audit](#)

- 13 Change the **Future Status Date** field to tomorrow's date.
- 14 Change the **Future Status** drop down menu to **Inactive**.
- 15 Click the **Save** button. Your entries are saved and the process is complete.