

**Procurement Items Overview**

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 establish item/supplier relationships.

Item setup is integral to the Cardinal Procurement module because it provides a means to track commodity prices, quantities used, market trends, and quality of goods/services received from suppliers 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. The Contract Administrator and Buyer have access to create an item/supplier relationship for an item.

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

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## Understanding Items

The item code structure we use in purchasing is the National Institute of Governmental Purchasing (NIGP) standard. NIGP establishes categories that group the item codes into commodities, which are represented by a 3-digit class code, 5-digit class-item code, and a 7-digit class-item-group code. 10-digit values are very specific and have a fixed Unit of Measure (UOM).

Cardinal purchasing shares its information about items with other Cardinal financial modules, as well as eVA. Suppliers must be registered in eVA, which interfaces into Cardinal, in order to receive contract awards or purchase orders.

Although each item established in Cardinal is directly associated with one category, a hierarchy of categories is established. This hierarchy is used by the Cardinal item search function so you may logically navigate to an item.

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

- 001 – 899 represent goods
- 900 – 999 represent services

The following is an example of the 10-digit NIGP code structure breakout for **Item ID 7507731047**.

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

\*The last two digits of the **Item ID**, also referred to as Detail in the NIGP code structure, are assigned by the Fiscal Inventory Manager when the new item is set up in Cardinal.

### Add Items

Once you confirm that the desired NIGP item does not exist in Cardinal, contact the ASD or Fiscal Division to have it added. If an item is specific to inventory (i.e., WebIMS) the item must be assigned an IMS Stock Number before it can be added to Cardinal. Once WebIMS is updated, the new NIGP number/**Item ID** can be assigned.

### General Item Information

- Items and categories in Cardinal match NIGP and eVA item numbering.
- **Item:** 10 digits with the **Description** and **UOM** field predetermined and cannot be changed.
- **Category:** 3, 5, or 7 digits and the **Description** and **UOM** may be edited.
- Inventory items must be 10 digits and have an associated WebIMS number.
- Item/supplier relationships are required when building contracts.
- Item/supplier relationships are not required when building requisitions, purchase orders (PO), and sourcing events.

Line Items ?		Personalize   Find   View All   [Print]   [Refresh]   First   1-6 of 6   Last							
Basic Definition		Advanced Definition							
Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting	
<input type="checkbox"/> 1	7503548480	STONE, CRUSHED GRADE 25	7503548	LTN	15000.0000	12.4900	\$187,350.00	0.00000	

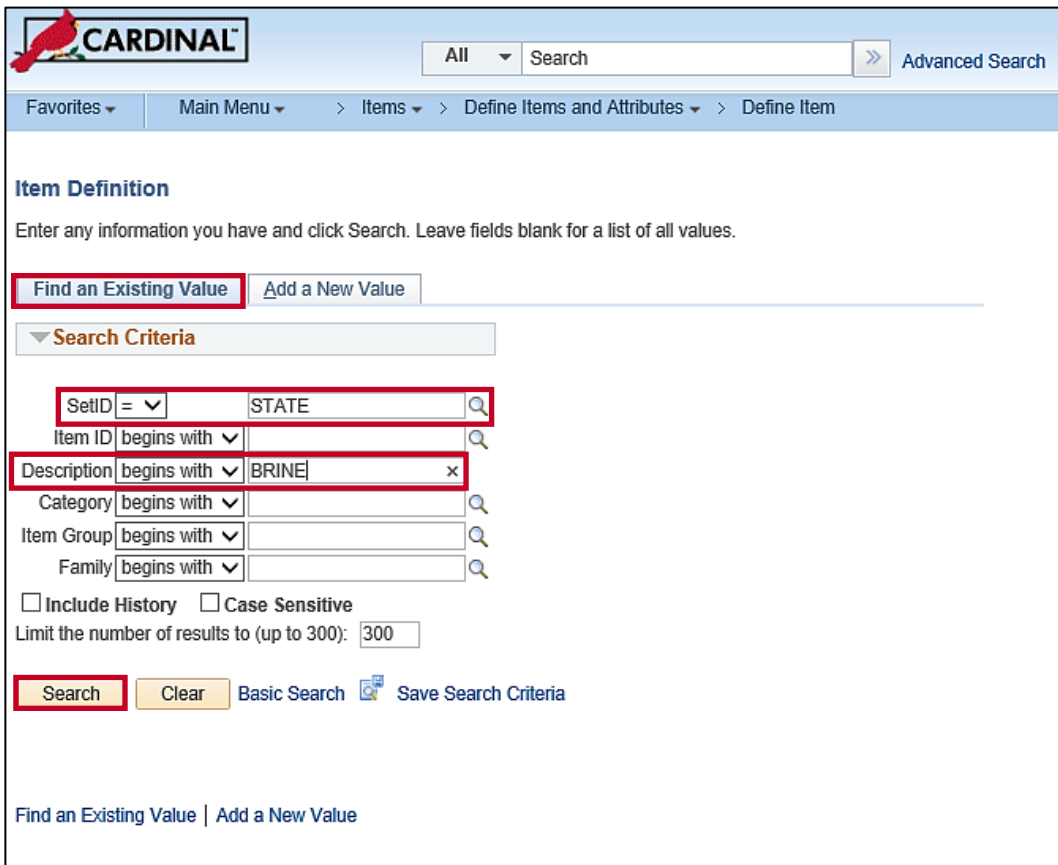
Example: Item shown displays pre-populated **Description**, **Category**, and **UOM**

**Search for an Item**


1. A request is made to add an NIGP item. You must first confirm that the item does not exist in Cardinal. If it does exist, verify its **Purchasing Attributes**. To search for the item, navigate to the **Item Definition** page using the following path:

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

2. The **Item Definition** page displays.



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


All ▾ Search 
» Advanced Search

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.

▼ Search Criteria

SetID = ▾  x 🔍

Item ID begins with ▾  🔍

Description contains ▾

Category begins with ▾  🔍

Item Group begins with ▾  🔍

Family begins with ▾  🔍

Include History    Case Sensitive

Limit the number of results to (up to 300):

**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](#)

7. A listing appears that displays all items that match the search term(s). If the item you are searching for is listed then it is indeed an NIGP item and you do not need to add it.
8. Select an item to view its attributes.

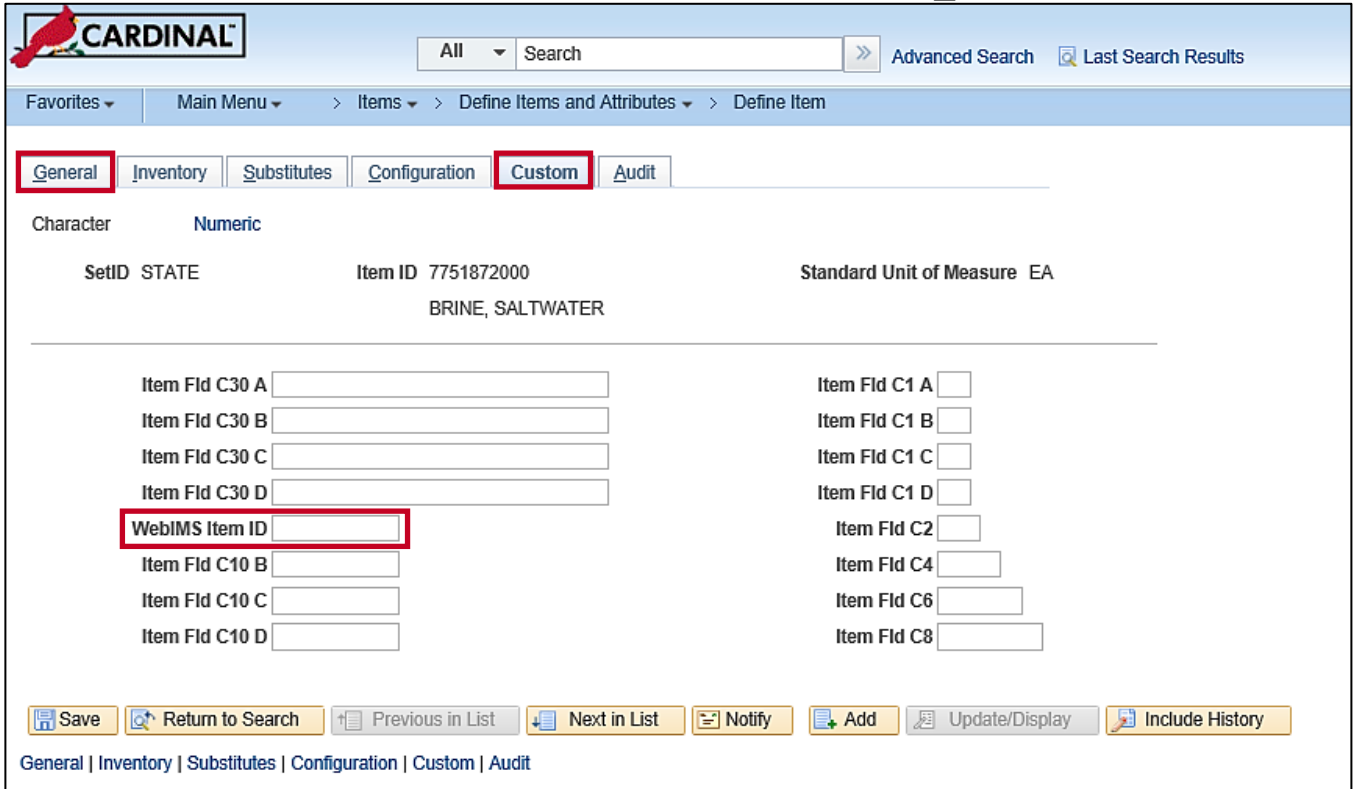
9. The **General** tab displays by default.

The screenshot shows the 'Define Item' screen in the Cardinal system. The 'General' tab is active. The 'Item Type' section is highlighted with a red box, showing the 'Inventory Item' checkbox checked. The '\*Standard UOM' field is also highlighted with a red box, showing 'EA' selected from a dropdown menu. Other visible fields include 'Item ID 7751872000', '\*Description BRINE, SALTWATER', 'Current Status Date 11/26/2011', '\*Current Status Active', 'Future Status Date', 'Future Status', 'Copy Item Status', 'Default Category 7751872', '\*Physical Nature Goods', 'Item Group', 'Family', 'Demand Priority', 'Cost Profile Group', and 'Promise Option'. The bottom of the screen features navigation buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display, and Include History.

10. The **Standard UOM** (Unit of Measure) values in Cardinal match those in WebIMS. The value assigned here interfaces to eVA.

11. Check the **Inventory Item** check-box for all WebIMS items.

12. Click the **Custom** tab.




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

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

Item Fld C30 A       Item Fld C1 A   
 Item Fld C30 B       Item Fld C1 B   
 Item Fld C30 C       Item Fld C1 C   
 Item Fld C30 D       Item Fld C1 D   
**WebIMS Item ID**       Item Fld C2   
 Item Fld C10 B       Item Fld C4   
 Item Fld C10 C       Item Fld C6   
 Item Fld C10 D       Item Fld C8

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

13. If the **WebIMS Item ID** field is blank, the item is not a WebIMS inventory item. If the item is a WebIMS-related item, a value is listed.
14. Click the **General** tab.



All  >>
Advanced Search
Last Search Results

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

General
Inventory
Substitutes
Configuration
Custom
Audit

Common	Classifications	Classification 2	Dimensions	Usage
SetID STATE	Item ID 7751872000			
*Description <input type="text" value="BRINE, SALTWATER"/>				

**Item Status**

Current Status Date <input type="text" value="11/26/2011"/>	*Current Status <input type="text" value="Active"/>
Future Status Date <input type="text" value=""/>	Future Status <input type="text" value=""/> <span>Copy Item Status</span>

*Standard UOM <input type="text" value="EA"/> <span>Each</span>	Default Category <input type="text" value="7751872"/> <span>Categories</span>
*Physical Nature <input type="text" value="Goods"/>	
Item Group <input type="text" value=""/>	Family <input type="text" value=""/>
Demand Priority <input type="text" value=""/>	Cost Profile Group <input type="text" value=""/>
Promise Option <input type="text" value=""/>	

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](#)

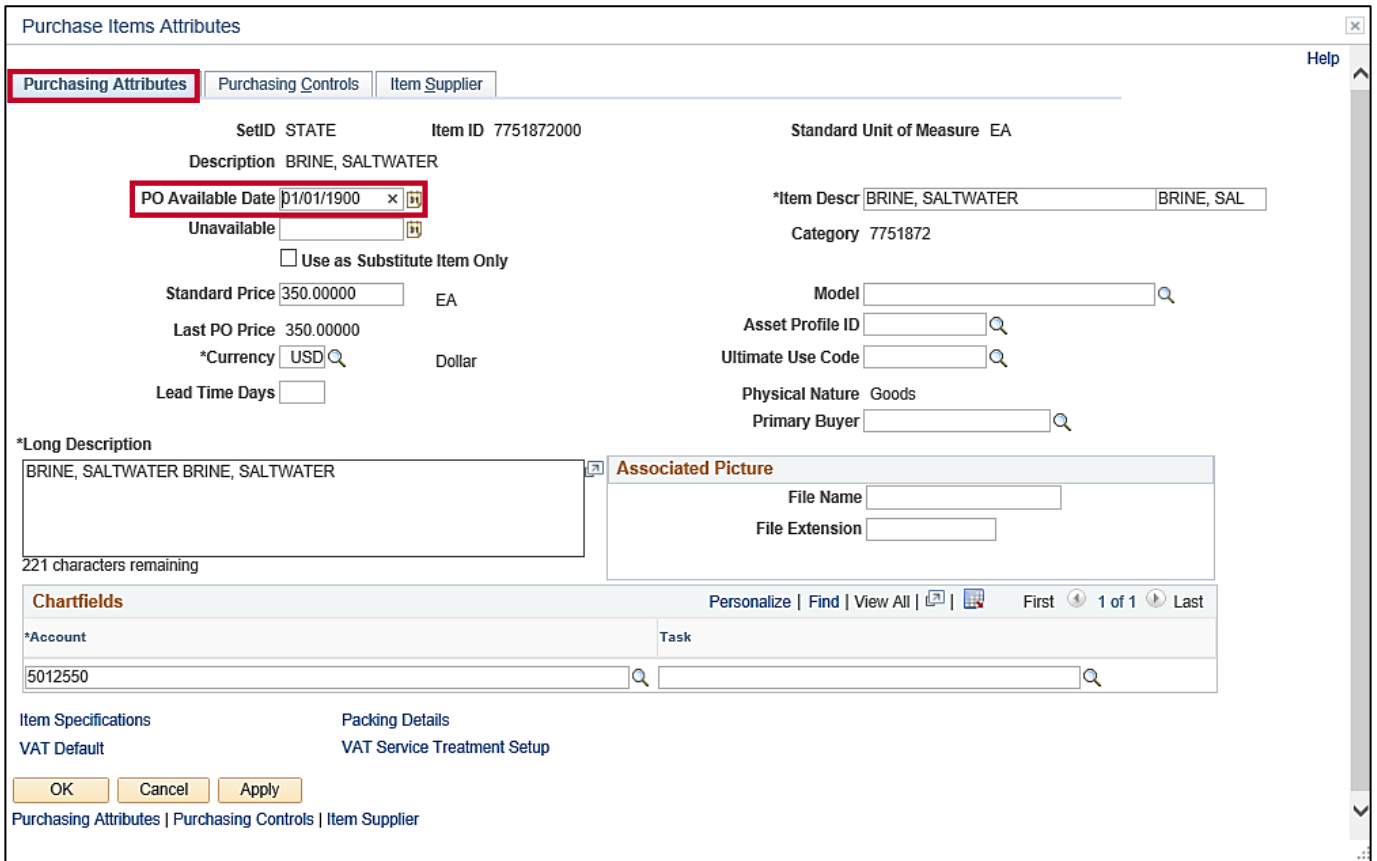
15. Click the **Purchasing Item Attributes** link.

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16. The **Purchasing Attributes** tab for the **Item** displays in a pop-up window.



17. The item is available if the **PO Available Date** field has a date value less than today. If the item is available, respond back to the requester and provide them with the **Item ID** (i.e., 10-digit NIGP number), a description of the item, and let them know if the item is a WebIMS inventory item. If the requester does not feel the existing item is specific for their use, you may need to add a new item.
18. If the requested item does not exist in Cardinal, users with the Fiscal Inventory Manager role can set up a new item.

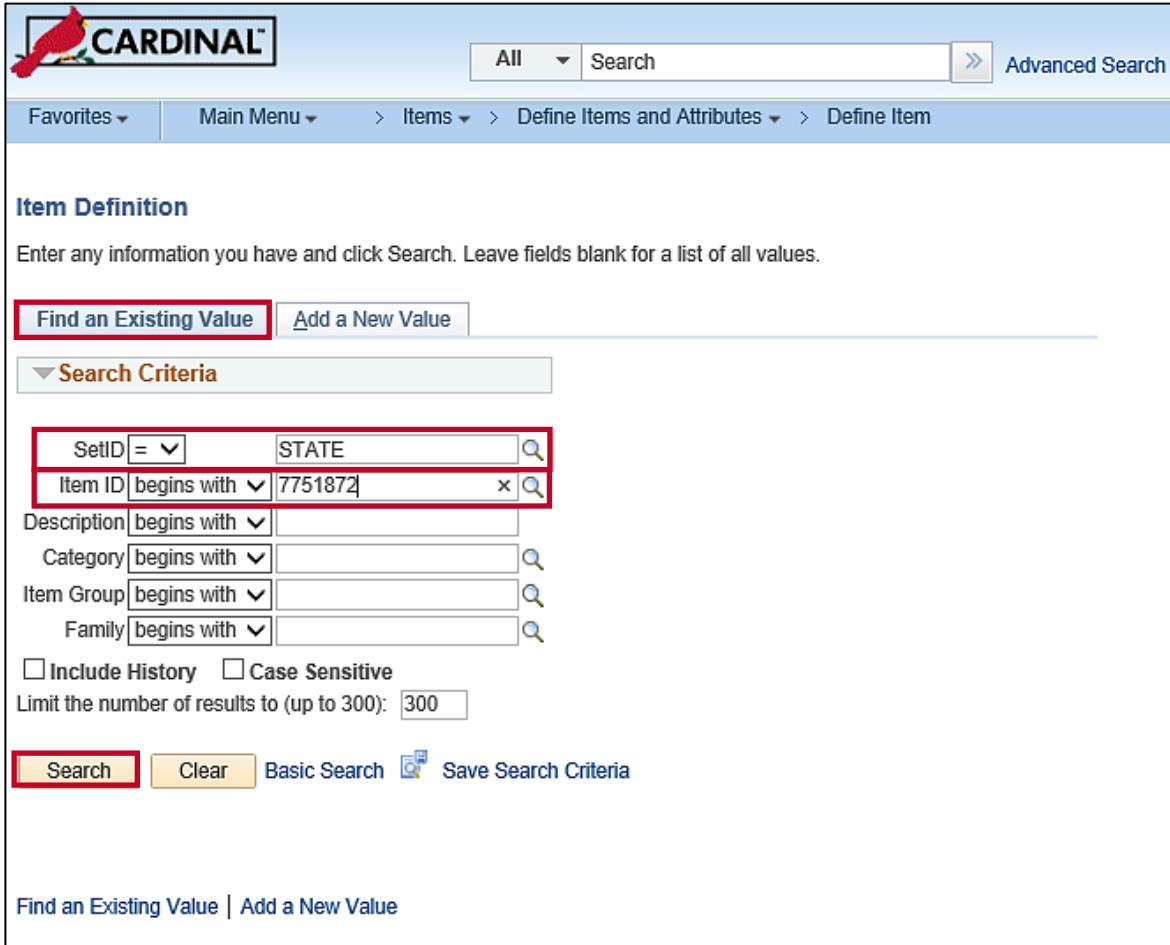
### Adding a New NIGP Number (Item ID)

Users must have the Fiscal Inventory Manager role in order to set up new items in Cardinal.

1. First you will need to determine the new item number using the NIGP Code Structure. (Refer to the [Add Items](#) section at the beginning of this job aid for the NIGP Code Structure).
2. Navigate to the **Item Definition** page using the following path:

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

- The **Item Definition** page displays.



**CARDINAL** All Search Advanced Search

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

Search Criteria

SetID = STATE

Item ID begins with 7751872

Description begins with

Category begins with

Item Group begins with

Family begins with

Include History  Case Sensitive

Limit the number of results to (up to 300): 300

**Search** Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

- Click the **Find an Existing Value** tab.
- Ensure that **STATE** is listed in the **SetID** field.
- 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 based on the NIGP Code Structure. (Refer to the [Add Items](#) section at the beginning of this job aid for the NIGP Code Structure).

<u>Item ID</u>	<u>Category</u>	<u>Description</u>
1 <sup>st</sup> 3 <sup>rd</sup> Digits	Class	Road Materials Not Asphaltic
4 <sup>th</sup> and 5 <sup>th</sup> Digits	Item	Sand and Gravel
6 <sup>th</sup> and 7 <sup>th</sup> Digits	Group	Gravel

- 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](#)

**Search Criteria**

SetID =

Item ID begins with

Description begins with


Category begins with

Item Group begins with

Family begins with

Include History    Case Sensitive

Limit the number of results to (up to 300):

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

---

**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)	(blank)

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

8. A complete listing displays of all items within the **Class/Item/Group** you selected. You need to determine if there is numbering space available within this general NIGP category. If yes, you can use this general category and add the Detail number (last 3 digits of the NIGP) to it. Then you will have your complete 10-digit NIGP number for this new item.

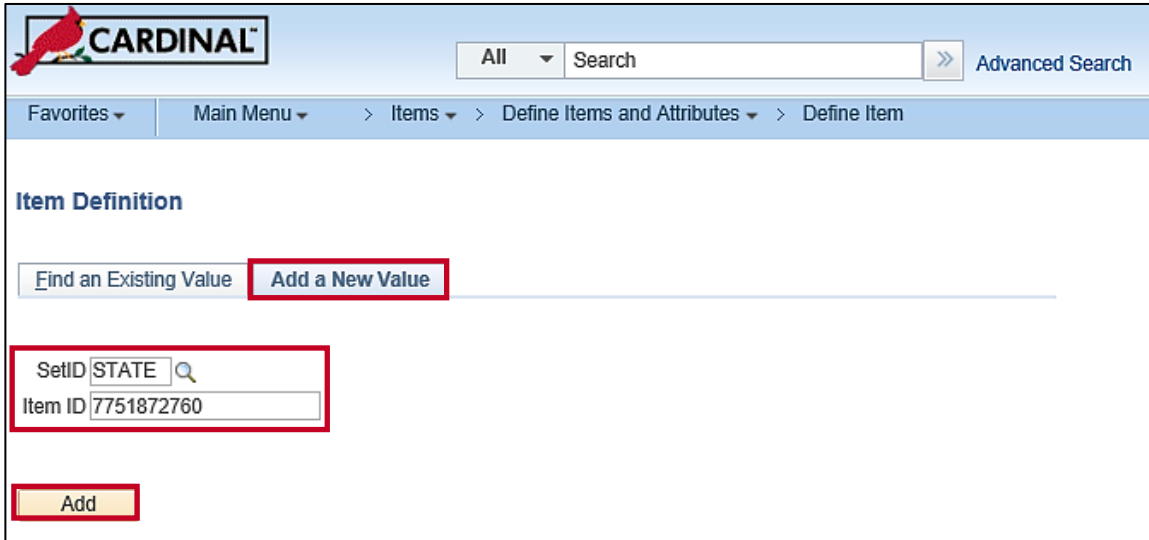
<u>Item ID</u>	<u>Category</u>	<u>Description</u>
1 <sup>st</sup> 3 <sup>rd</sup> Digits	Class	Road Materials Not Asphaltic
4 <sup>th</sup> and 5 <sup>th</sup> Digits	Item	Sand and Gravel
6 <sup>th</sup> and 7 <sup>th</sup> Digits	Group	Gravel
7 <sup>th</sup> , 8 <sup>th</sup> and 9 <sup>th</sup> Digits	Detail*	No. 9 UOM=Ton

\*The last two digits of the NIGP number, also referred to as Detail in the NIGP code structure, are assigned by the Cardinal Fiscal Inventory Manager when the new item is set up in Cardinal. In this example there are only 2 **Item IDs** that begin with 7751872. For the Detail number you assign to the end of the NIGP number you may use any number between the two numbers. In this example, the last 3 digits of the new **Item ID** would be any number from 001 to 149 or from 151 to 999. The newly created NIGP number will be your **Item ID** number in Cardinal.

**Add a New Item**

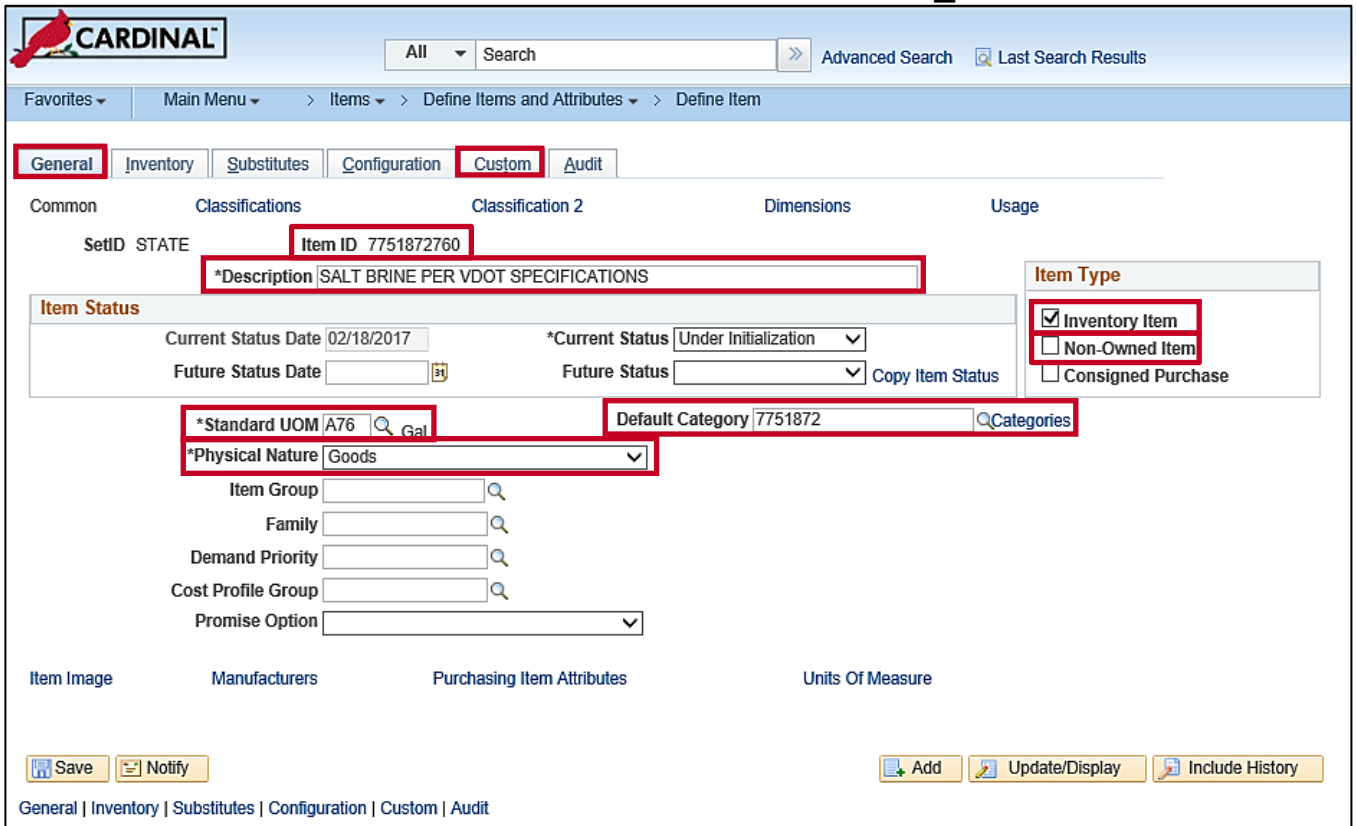
9. Once you have determined the new NIGP number /**Item ID**, you will need to add it to Cardinal. Navigate to the **Item Definition** page using the following path:

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



The screenshot shows the 'Item Definition' page in the Cardinal system. The breadcrumb navigation is 'Main Menu > Items > Define Items and Attributes > Define Item'. The page has two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there are two input fields: 'SetID STATE' with a search icon and 'Item ID 7751872760'. An 'Add' button is located at the bottom left of the form area.

10. Click the **Add a New Value** tab.
11. Ensure that **STATE** is listed in the **SetID** field.
12. Enter the new NIGP/**Item ID** number in the **Item ID** field. If the word **NEXT** is the defaulted value, simply delete it and enter the new **Item ID**.
13. Click the **Add** button.

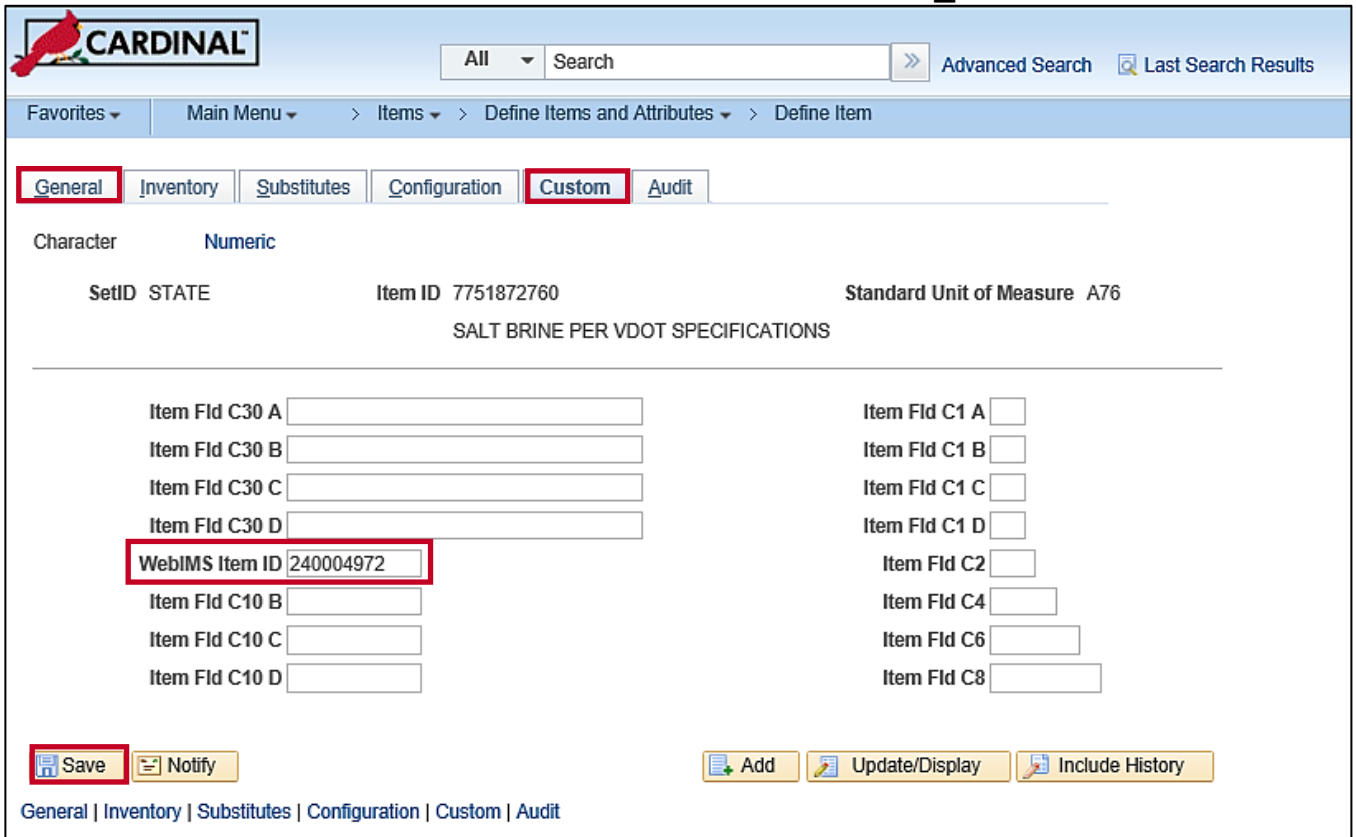


The screenshot shows the 'Define Item' page in the Cardinal system. The 'Custom' tab is active. The following fields are highlighted with red boxes:

- Item ID:** 7751872760
- Description:** SALT BRINE PER VDOT SPECIFICATIONS
- Standard UOM:** A76 Gal
- Default Category:** 7751872
- Physical Nature:** Goods
- Item Type:**  Inventory Item,  Non-Owned Item,  Consigned Purchase

Other visible fields include: SetID, STATE, \*Current Status (Under Initialization), Future Status, Current Status Date (02/18/2017), Future Status Date, Item Group, Family, Demand Priority, Cost Profile Group, and Promise Option.

14. Verify that you entered the correct 10-digit NIGP number. This is done by checking the **Item ID** number.
15. Enter/select values for the following required fields:
  - **Description**
  - **Standard UOM**
  - **Default Category** (1<sup>st</sup> seven digits of the NIGP number)
  - **Physical Nature (Goods or Services)**
16. If the item is a WebIMS inventory item, select the **Inventory Item** check-box. If it is not an inventory item, select the **Non-Owned Item** check-box.
17. Click the **Custom** tab.



The screenshot shows the CARDINAL web application interface for defining an item. The 'Custom' tab is selected, and the 'WebIMS Item ID' field is highlighted with a red box and contains the value '240004972'. The interface includes a search bar, navigation tabs, and various input fields for item details.

Character: Numeric

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

SALT BRINE PER VDOT SPECIFICATIONS

Item Fld C30 A:

Item Fld C30 B:

Item Fld C30 C:

Item Fld C30 D:

**WebIMS Item ID: 240004972**

Item Fld C10 B:

Item Fld C10 C:

Item Fld C10 D:

Item Fld C1 A:

Item Fld C1 B:

Item Fld C1 C:

Item Fld C1 D:

Item Fld C2:

Item Fld C4:

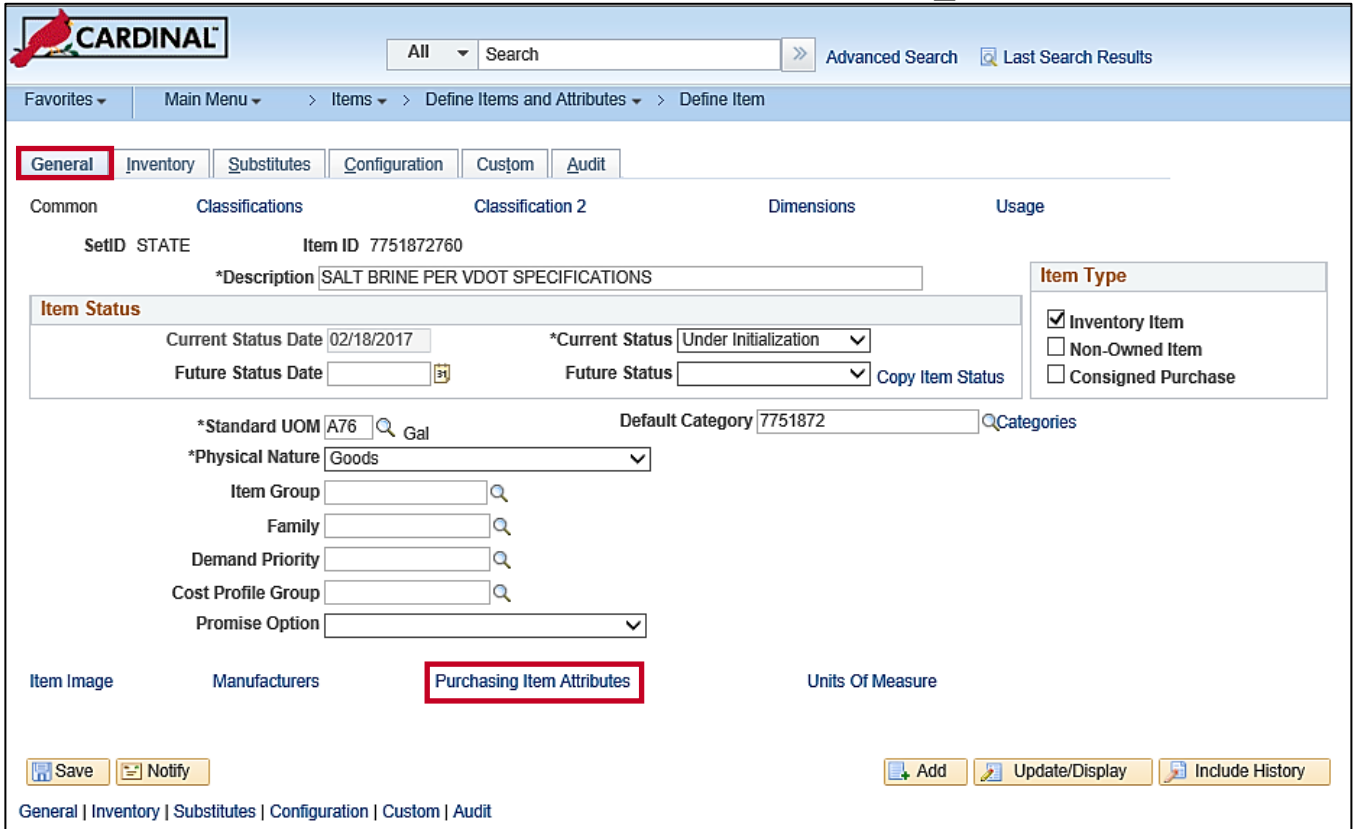
Item Fld C6:

Item Fld C8:

Buttons: Save, Notify, Add, Update/Display, Include History

Navigation: General | Inventory | Substitutes | Configuration | Custom | Audit

18. If the item is an inventory item, enter the **WebIMS Item ID** (i.e., stock number). If it is not an inventory item, leave the field blank.
19. Click the **Save** button.
20. Click the **General** tab.



**CARDINAL** All Search >> Advanced Search Last Search Results

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

**General** Inventory Substitutes Configuration Custom Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

\*Description SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**

Current Status Date 02/18/2017 \*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

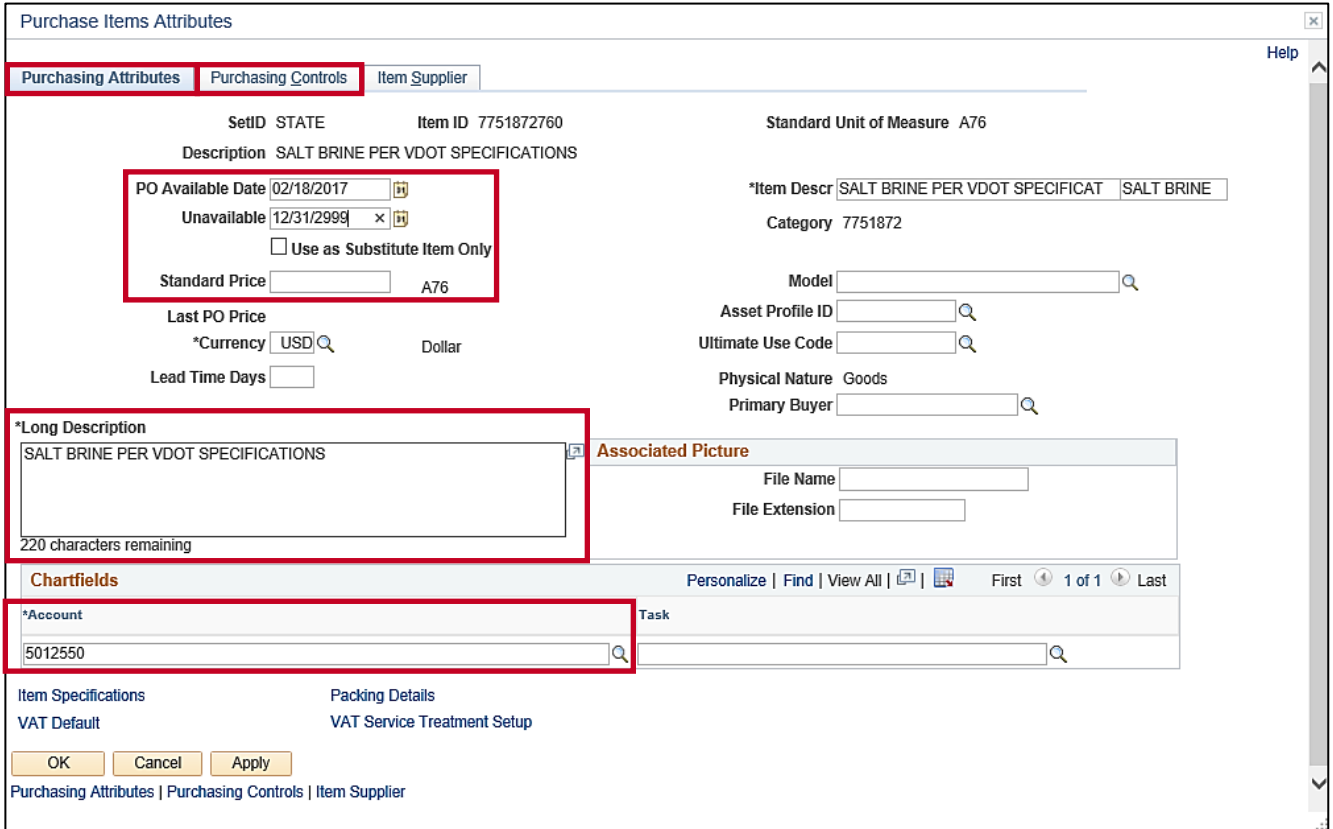
Item Image Manufacturers **Purchasing Item Attributes** Units Of Measure

Save Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

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

22. The **Purchase Items Attributes** page displays.



23. The **PO Available Date** will default to today's date. Do not change this value.

24. In the **Unavailable** date field enter **12/31/2999**.

25. In the **Standard Price** field enter **.01** (one cent).

26. If the **Description** you entered on the previous page was shortened, you may enter the full description into the **Long Description** field.

27. In the **Chartfields** section, a default **Account** value may populate. If an **Account** value does not default, you need to enter one.

28. Click the **Purchasing Controls** tab.



Purchase Items Attributes [X]

Purchasing Attributes **Purchasing Controls** Item Supplier Help

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 Supplier

29. All sections are collapsed for this panel group.
30. Click the **Expand All** link to see all available fields.

Purchase Items Attributes
Help

Purchasing Attributes | Purchasing Controls | Item Supplier

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 <span style="border: 1px solid red; padding: 2px;">Required</span>	<input type="checkbox"/> Inspection Required
<input checked="" type="checkbox"/> Reject Qty Over Tolerance	Inspect Sample Percent <span style="border: 1px solid gray; padding: 2px;">0.00</span>
Qty Rcvd Tolerance % <span style="border: 1px solid red; padding: 2px;">10.00</span>	*Inspection UOM <span style="border: 1px solid gray; padding: 2px;">Standard</span>
*Partial Qty <span style="border: 1px solid gray; padding: 2px;">Recvd/Warn</span>	Inspect ID <span style="border: 1px solid gray; padding: 2px;"></span>
Early Ship Reject Days <span style="border: 1px solid gray; padding: 2px;">2</span>	

**Sourcing Controls**

<input type="checkbox"/> Use Category Sourcing Controls	*Sourcing Method <span style="border: 1px solid gray; padding: 2px;">B</span> <span style="font-size: small;">Basic</span>
Lead Time Factor % <span style="border: 1px solid gray; padding: 2px;">0.00</span>	Ship to Priority Factor % <span style="border: 1px solid gray; padding: 2px;">0.00</span>
Price Factor % <span style="border: 1px solid gray; padding: 2px;">0.00</span>	Supplier Priority Factor % <span style="border: 1px solid gray; padding: 2px;">0.00</span>

**Misc. Controls and Options**

<input checked="" type="checkbox"/> Auto Select <input checked="" type="checkbox"/> Accept Any Supplier <input checked="" type="checkbox"/> Accept Any Ship To <input checked="" type="checkbox"/> Available in All Regions	<input type="checkbox"/> Contract Required <input type="checkbox"/> RFQ Required <input type="checkbox"/> Stockless Item <input checked="" type="checkbox"/> Taxable <input checked="" type="checkbox"/> Include in Planning
Close PO Under Percent Tol <span style="border: 1px solid gray; padding: 2px;"></span>	
Ship Via <span style="border: 1px solid gray; padding: 2px;"></span>	

**WorkFlow Notification Controls**

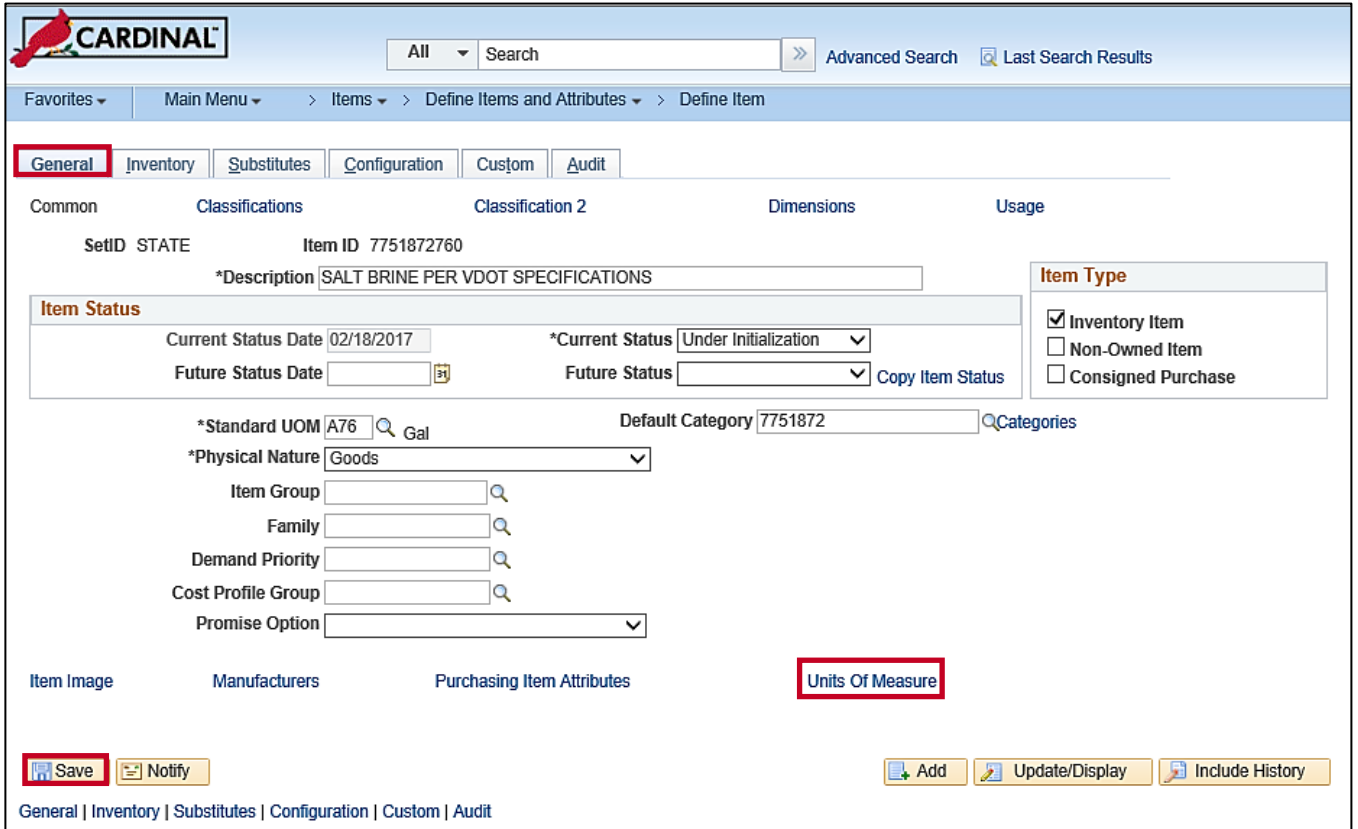
BU Attributes

OK
Cancel
Apply

Purchasing Attributes | Purchasing Controls | Item Supplier

31. Some fields will have default values and are grayed out.
32. Enter valid values in required fields, as applicable:
  - **Unit Price Tolerance:** defaults to **0.00**.
  - **Ext Price Tolerance:** defaults to **0.00**.
  - **Receiving Required:** drop-down menu should always be set to **Required**.
  - **Qty Rcvd Tolerance %:** set to **10** for bulk commodities. All others are set to **0**.
33. Click the **Apply** button.
34. Click the **OK** button.

35. The **General** tab displays.



**CARDINAL** All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Define Item

**General** Inventory Substitutes Configuration Custom Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

\*Description SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**

Current Status Date 02/18/2017 \*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**

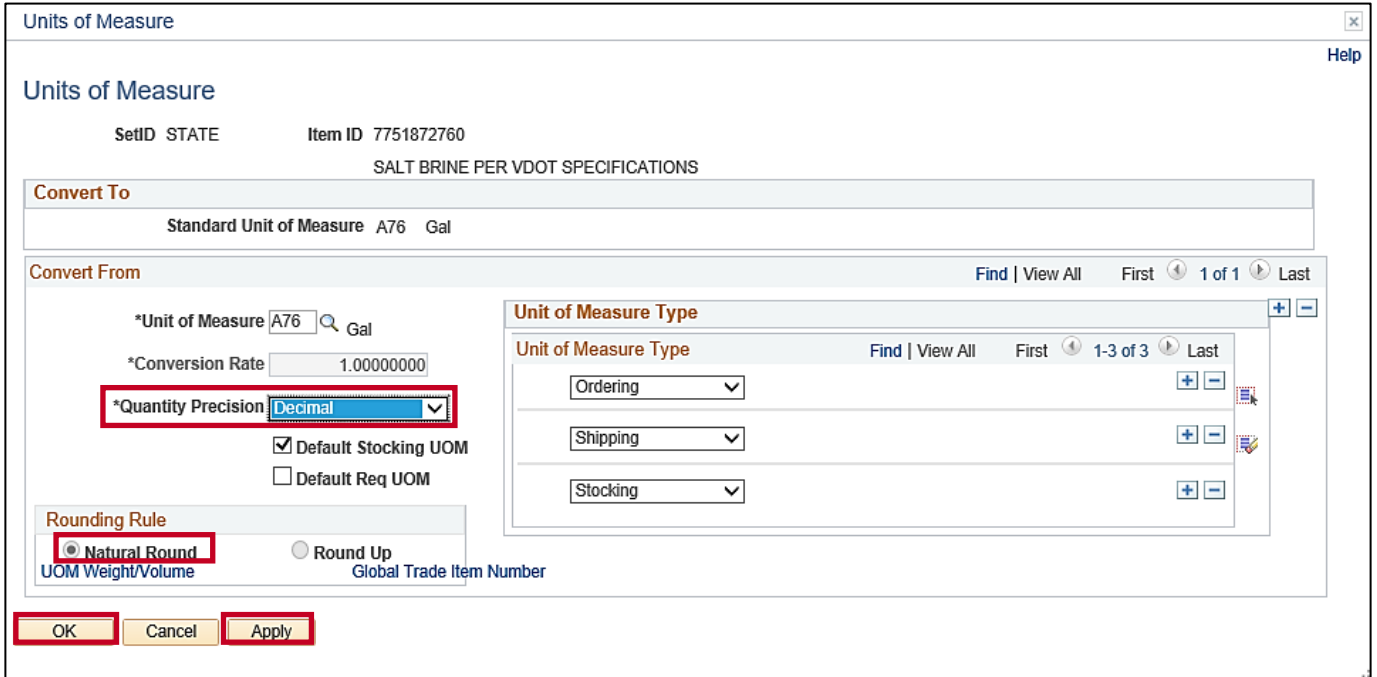
**Save** Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom | Audit

36. Click the **Save** button.

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

### Modify the Unit of Measure



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** UOM Weight/Volume  
 Round Up Global Trade Item Number

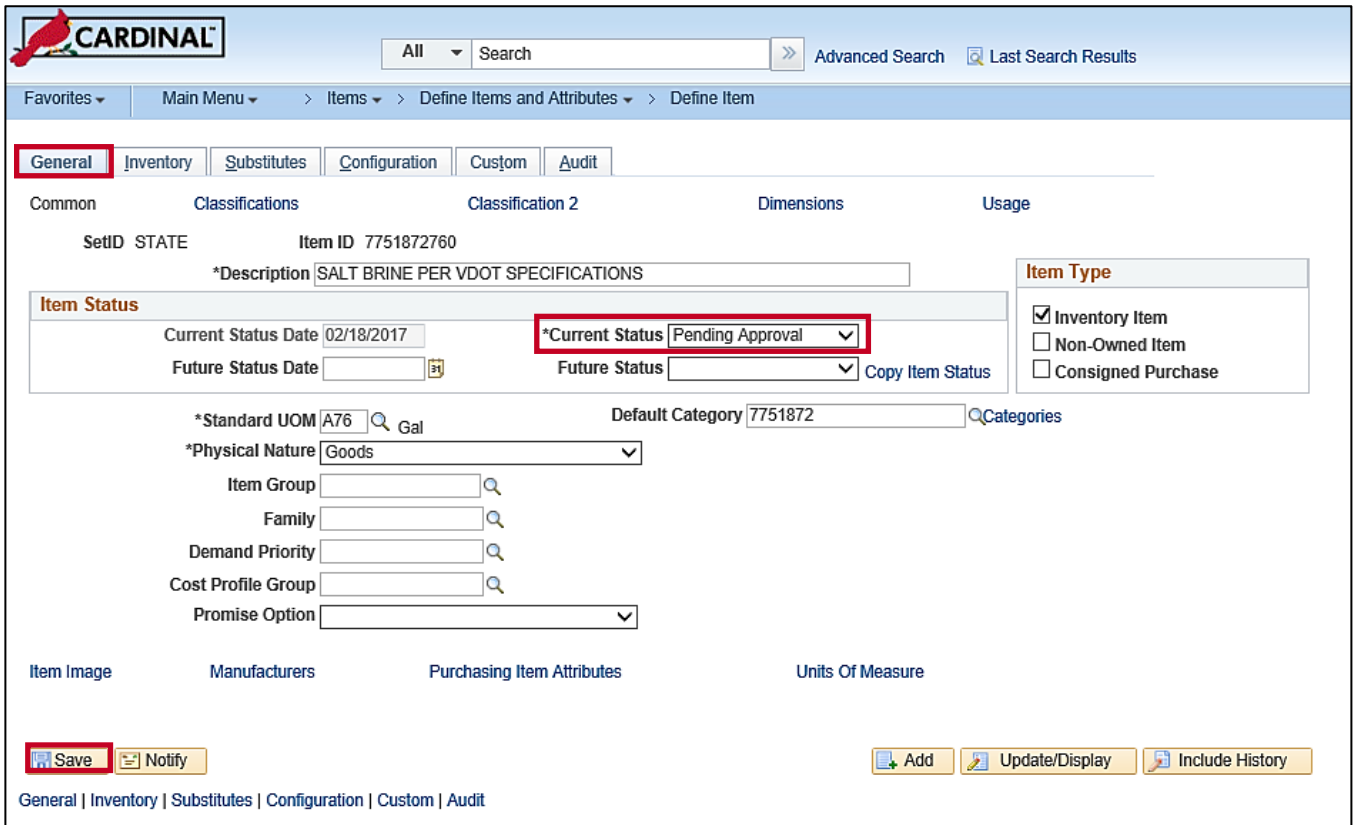
**Unit of Measure Type** Find | View All First 1-3 of 3 Last

Ordering	+ -
Shipping	+ -
Stocking	+ -

OK Cancel Apply

38. Using the **Quantity Precision** drop-down menu, select **Decimal**.
39. The **Rounding Rule** section should always be set to **Natural Round**.
40. Click the **Apply** button.
41. Click the **OK** button.

42. The **General** tab displays.

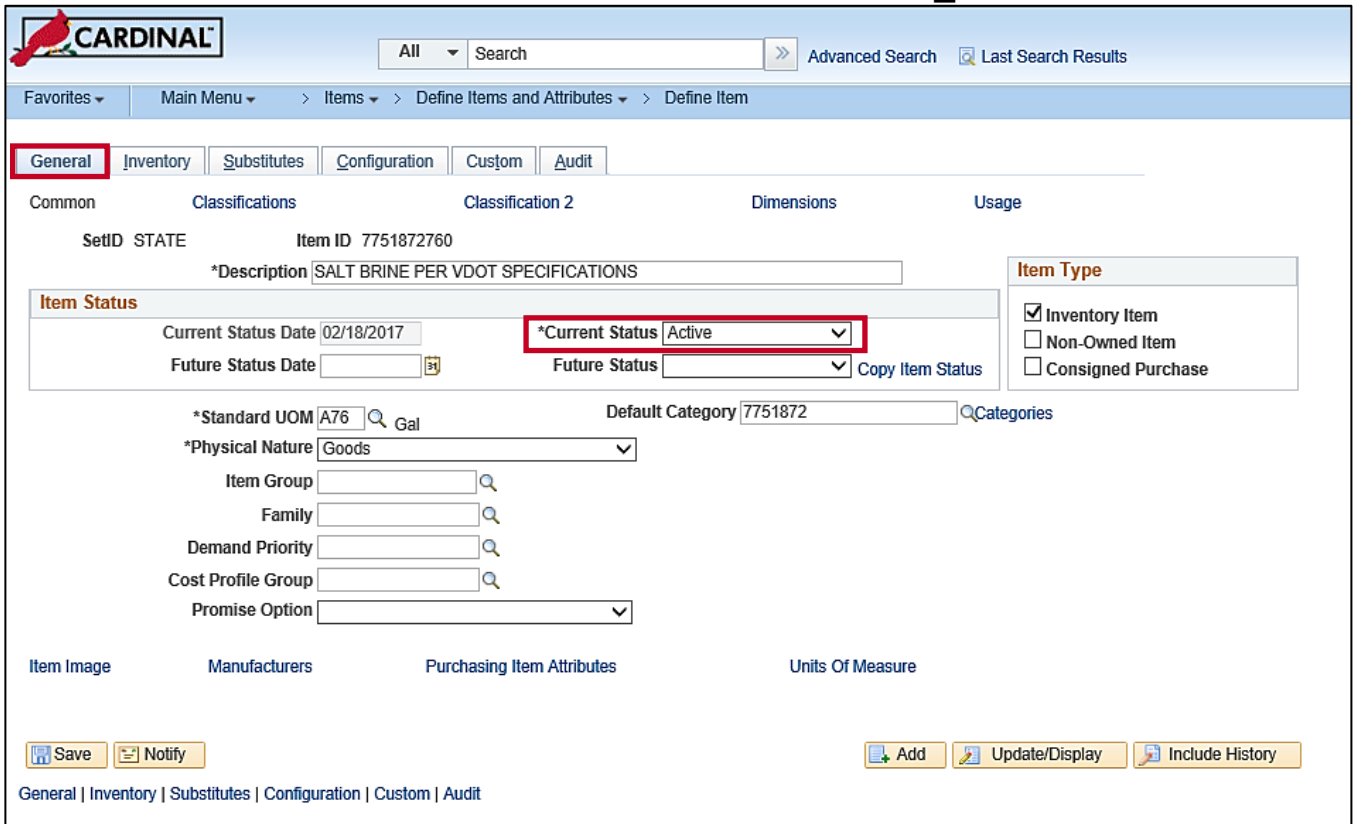


The screenshot shows the 'Define Item' page in the Cardinal system. The 'General' tab is selected and highlighted with a red box. The page displays various fields for item configuration, including 'SetID STATE', 'Item ID 7751872760', and '\*Description SALT BRINE PER VDOT SPECIFICATIONS'. The 'Item Status' section is expanded, showing 'Current Status Date 02/18/2017', 'Future Status Date', and '\*Current Status Pending Approval' (highlighted with a red box). The 'Item Type' section on the right has 'Inventory Item' checked. At the bottom, the 'Save' button is highlighted with a red box. Navigation buttons for 'Add', 'Update/Display', and 'Include History' are also visible.

43. Click the **Save** button.

44. Using the **Current Status** drop-down menu, select **Pending Approval**.

45. Click the **Save** button.



**CARDINAL** All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Define Item

**General** Inventory Substitutes Configuration Custom Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

\*Description SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**

Current Status Date 02/18/2017 \*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 Notify Add Update/Display Include History

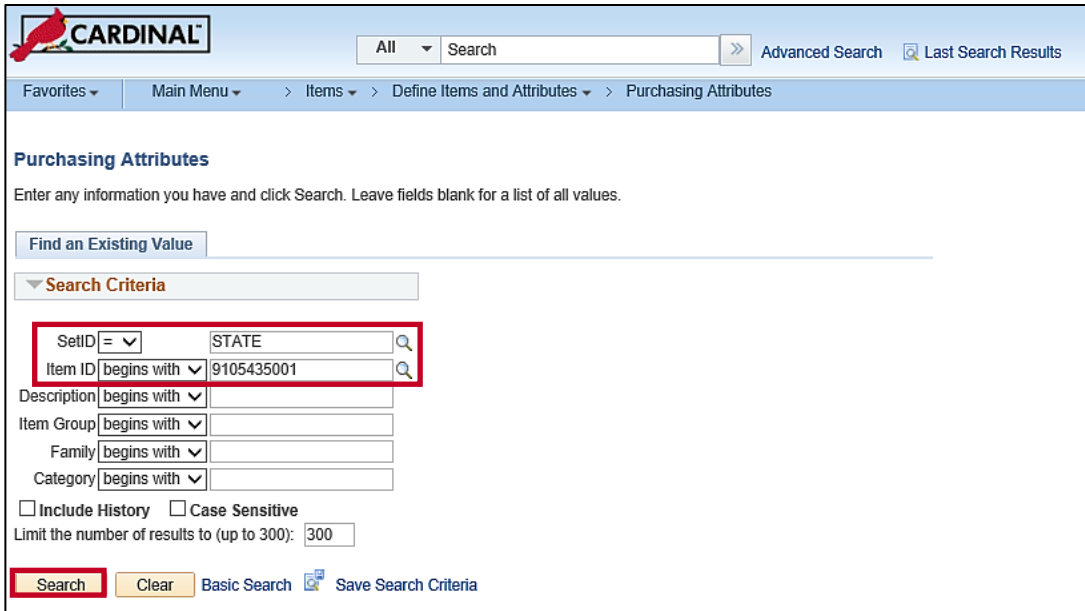
General | Inventory | Substitutes | Configuration | Custom | Audit

46. Upon **Save** the **Current Status** updates from **Pending Approval** to **Active**. Your new item is created and the process is complete.
47. Once a new NIGP number/**Item ID** is created in Cardinal, the item/supplier relationship needs to be established in Cardinal.

**Create a New Item/Supplier Relationship**

1. To create the item/supplier relationship in Cardinal, navigate to the **Purchasing Attributes** search page using the following path:

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



**CARDINAL** All Search >> Advanced Search Last Search Results

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

### Purchasing Attributes

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

Find an Existing Value

Search Criteria

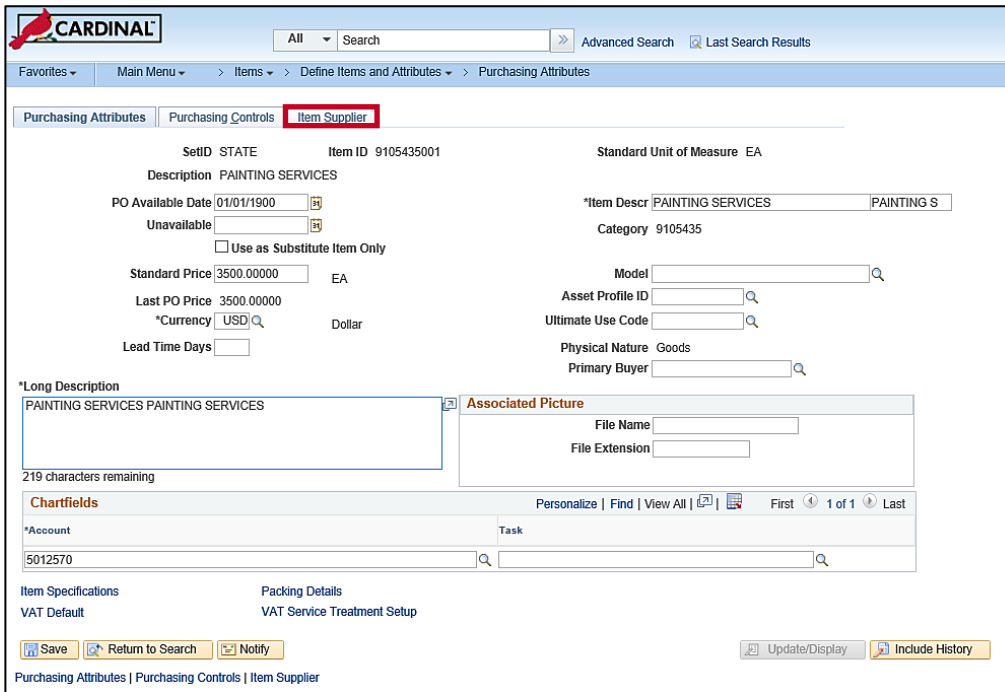
SetID	=	STATE	Q
Item ID	begins with	9105435001	Q
Description	begins with		
Item Group	begins with		
Family	begins with		
Category	begins with		

Include History  Case Sensitive  
Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

2. Enter the **SetID**. In this example, **STATE** is used.
3. Enter the **Item ID**. In this example, the item **9105435001** (painting services) is used.
4. Click the **Search** button.

5. The **Purchasing Attributes** page displays.



**CARDINAL** All Search >> Advanced Search Last Search Results

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

Purchasing Attributes | Purchasing Controls | **Item Supplier**

SetID STATE Item ID 9105435001 Standard Unit of Measure EA

Description PAINTING SERVICES

PO Available Date 01/01/1900 \*Item Descr PAINTING SERVICES PAINTING S

Unavailable Use as Substitute Item Only

Standard Price 3500.00000 EA Category 9105435

Last PO Price 3500.00000 Model Asset Profile ID Ultimate Use Code

\*Currency USD Dollar Physical Nature Goods Primary Buyer

Lead Time Days

\*Long Description PAINTING SERVICES PAINTING SERVICES 219 characters remaining

Associated Picture File Name File Extension

Chartfields Personalize | Find | View All | First 1 of 1 Last

\*Account 5012570 Task

Item Specifications Packing Details VAT Default VAT Service Treatment Setup

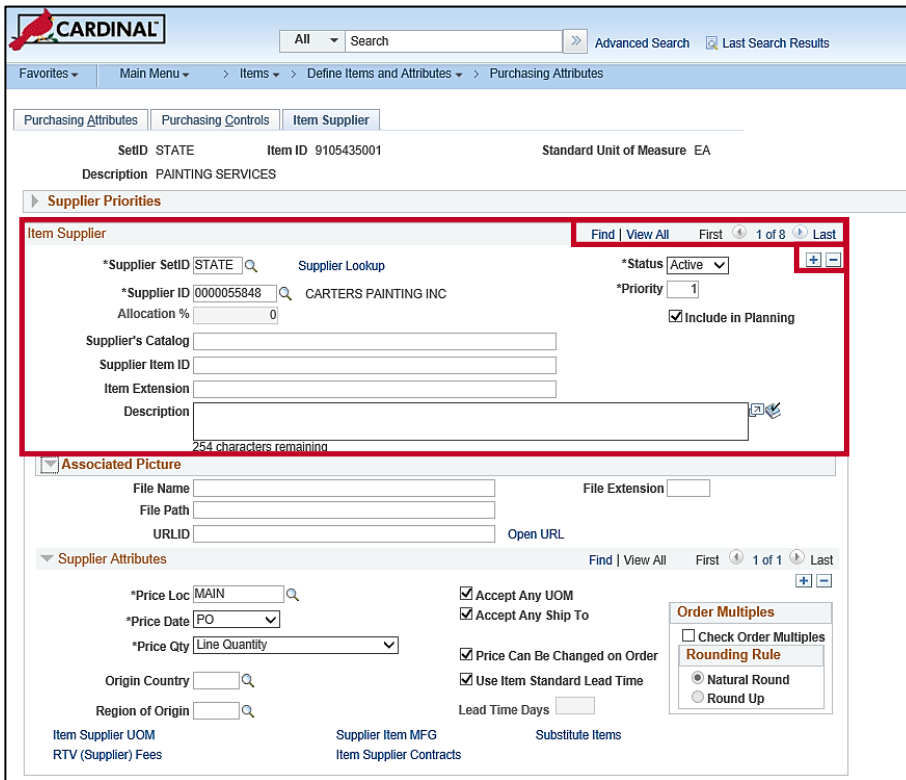
Save Return to Search Notify Update/Display Include History

Purchasing Attributes | Purchasing Controls | Item Supplier

6. Click the **Item Supplier** tab.



- Suppliers with associations to the item selected display.



**CARDINAL** All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls **Item Supplier**

SetID STATE Item ID 9105435001 Standard Unit of Measure EA  
Description PAINTING SERVICES

**Supplier Priorities**

**Item Supplier** Find | View All First 1 of 8 Last

\*Supplier SetID STATE Supplier Lookup \*Status Active + -  
\*Supplier ID 0000055848 CARTERS PAINTING INC \*Priority 1  
Allocation % 0  Include in Planning

Supplier's Catalog  
Supplier Item ID  
Item Extension  
Description 254 characters remaining

**Associated Picture**

File Name File Extension  
File Path  
URLID Open URL

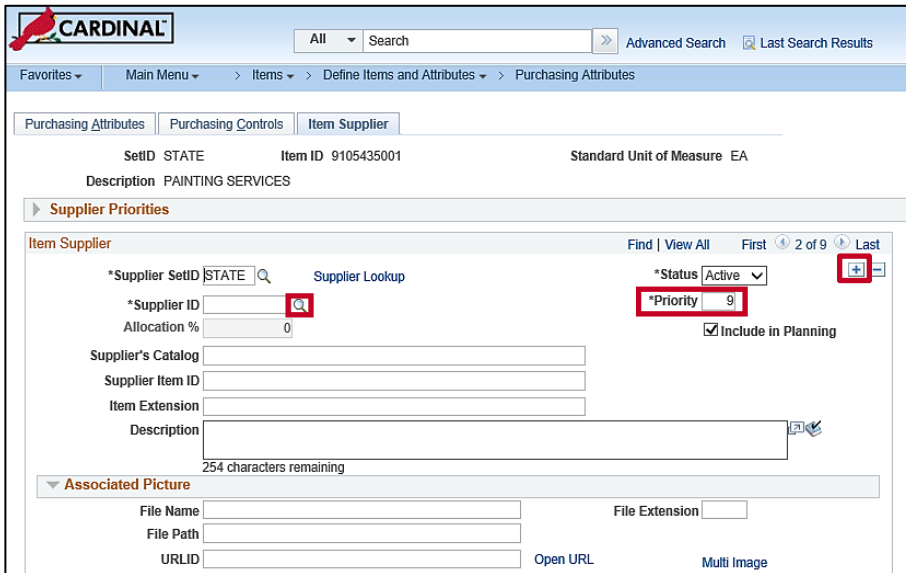
**Supplier Attributes** Find | View All First 1 of 1 Last

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

**Order Multiples**  
 Check Order Multiples  
Rounding Rule  
 Natural Round  
 Round Up

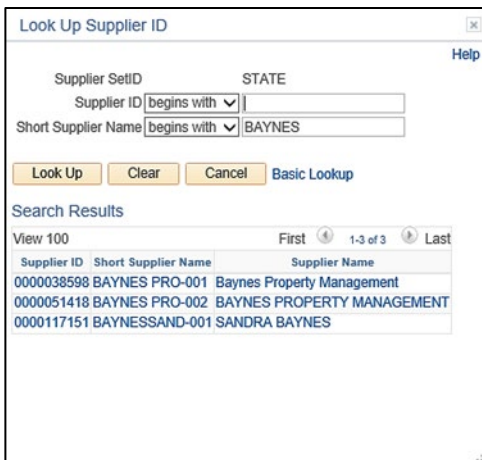
Item Supplier UOM Supplier Item MFG Substitute Items  
RTV (Supplier) Fees Item Supplier Contracts

- You may view or find a particular supplier using the **Show previous row** or **Show next row** arrow icons or by clicking on the **Find** or **View All** links. In this example, our supplier is not in the list and needs to be added.



**CARDINAL** All Search Advanced Search Last Search Results  
 Favorites Main Menu Items Define Items and Attributes Purchasing Attributes  
 Purchasing Attributes Purchasing Controls **Item Supplier**  
 SetID STATE Item ID 9105435001 Standard Unit of Measure EA  
 Description PAINTING SERVICES  
**Supplier Priorities**  
**Item Supplier** Find | View All First 2 of 9 Last  
 \*Supplier SetID STATE Supplier Lookup \*Status Active (+)  
 \*Supplier ID Supplier ID Lookup \*Priority 9  
 Allocation % 0 Include in Planning  
 Supplier's Catalog  
 Supplier Item ID  
 Item Extension  
 Description 254 characters remaining  
**Associated Picture**  
 File Name File Extension  
 File Path  
 URLID Open URL Multi Image

9. To add a new supplier relationship to this item, click the (+) sign in the **Item Supplier** section of the page.
10. The supplier **Priority** number is incrementally assigned. In this example, it is **9**.
11. Click the **Supplier ID** lookup magnifying glass.

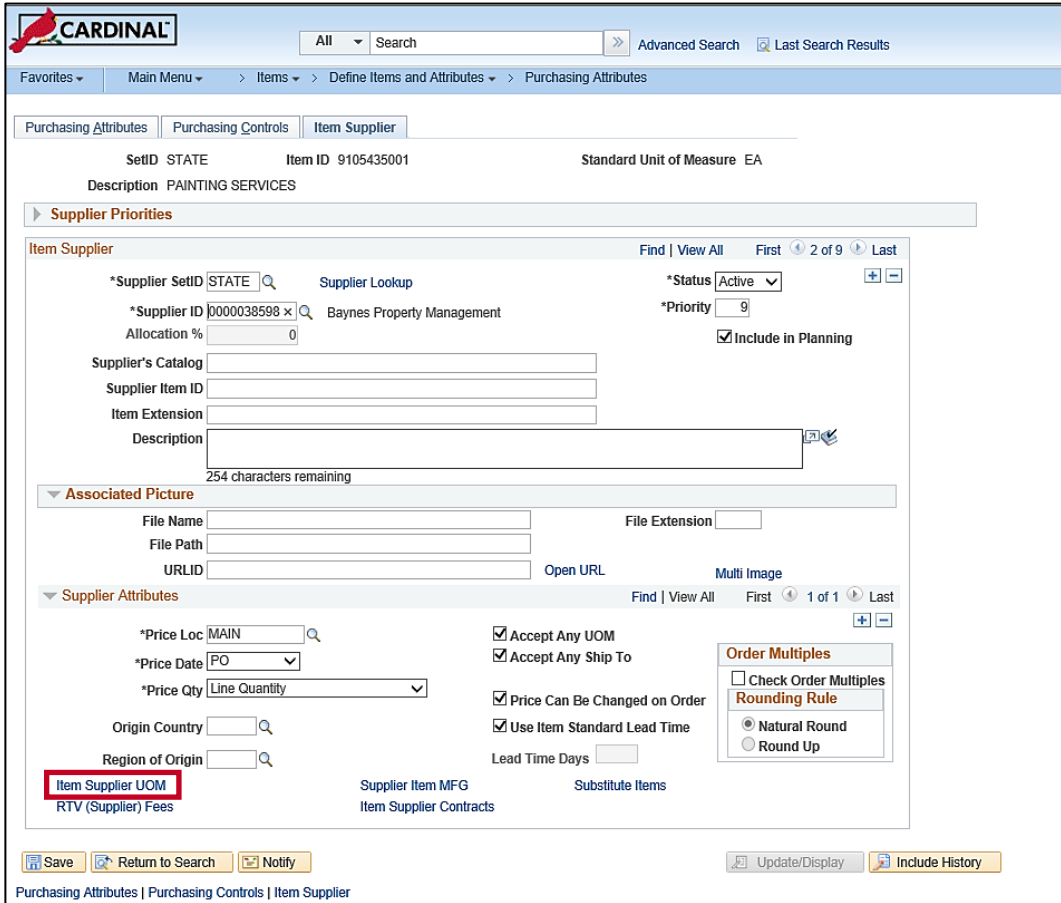


Look Up Supplier ID Help  
 Supplier SetID STATE  
 Supplier ID begins with  
 Short Supplier Name begins with BAYNES  
 Look Up Clear Cancel Basic Lookup  
**Search Results**  
 View 100 First 1-3 of 3 Last  

Supplier ID	Short Supplier Name	Supplier Name
0000038598	BAYNES PRO-001	Baynes Property Management
0000051418	BAYNES PRO-002	BAYNES PROPERTY MANAGEMENT
0000117151	BAYNESSAND-001	SANDRA BAYNES

12. Find and click the **Supplier ID** that you wish to associate with the selected item.

13. The selected supplier information populates as shown below.



The screenshot shows the 'Item Supplier' configuration page in the Cardinal Procurement system. The page is titled 'Item Supplier' and includes the following fields and sections:

- Item Supplier Section:**
  - \*Supplier SetID: STATE
  - \*Supplier ID: 0000038598 x
  - Supplier Name: Baynes Property Management
  - \*Status: Active
  - \*Priority: 9
  - Allocation %: 0
  - Include in Planning
  - Supplier's Catalog: [Empty]
  - Supplier Item ID: [Empty]
  - Item Extension: [Empty]
  - Description: [Empty]
- Associated Picture Section:**
  - File Name: [Empty]
  - File Extension: [Empty]
  - File Path: [Empty]
  - URLID: [Empty]
  - Open URL: [Empty]
  - Multi Image: [Empty]
- Supplier Attributes Section:**
  - \*Price Loc: MAIN
  - \*Price Date: PO
  - \*Price Qty: Line Quantity
  - Origin Country: [Empty]
  - Region of Origin: [Empty]
  - Accept Any UOM
  - Accept Any Ship To
  - Price Can Be Changed on Order
  - Use Item Standard Lead Time
  - Lead Time Days: [Empty]
  - Order Multiples:**
    - Check Order Multiples
    - Rounding Rule:**
      - Natural Round
      - Round Up
- Item Supplier UOM:** RTV (Supplier) Fees (highlighted with a red box)
- Supplier Item MFG:** [Empty]
- Substitute Items:** [Empty]
- Item Supplier Contracts:** [Empty]

At the bottom of the page, there are buttons for Save, Return to Search, Notify, Update/Display, and Include History.

14. Click the **Item Supplier UOM** link.

15. The **Supplier's UOM and Pricing Information** page displays.

Supplier's UOM and Pricing Information
Help

SetID STATE  
Supplier 0000038598 Baynes Property Management

Item ID 9105435001  
Location MAIN

PAINTING SERVICES

**Unit Of Measure** Find | View All First 1 of 1 Last

\*UOM EA Each  Default Packing Details + -

Minimum Quantity	1.0000		
Maximum Quantity	0.0000	Order Quantity Multiple	

Conversion to Item Base UOM

*Rate Type Standard	*Qty Precision Whole Nbr	<b>Rounding Rule</b> <input checked="" type="radio"/> Natural Round <input type="radio"/> Round Up
Std UOM Rate	Get Std Rate	

**UOM Price Attributes** Find | View All First 1 of 1 Last

*Effective Date 02/18/2017	*Currency Code USD
*Status Active	Supplier Price 3500.00000
*Minimum Quantity 1.0000	Standard Price Update Status No Update
Qty Rcvd Tolerance % 0.00	BU Price Update Status No Update

▶ Matching Controls

OK
Cancel

16. Item information populates as shown and is available for edit, if necessary.

17. The **Minimum Quantity** may be less than 1.

18. The **Maximum Quantity** will default to **0** and should not be changed.

Supplier's UOM and Pricing Information Help

SetID STATE Item ID 9105435001 PAINTING SERVICES  
Supplier 0000038598 Baynes Property Management Location MAIN

**Unit Of Measure** Find | View All First 1 of 1 Last

\*UOM EA Each  Default Packing Details [+]  
Effective Dated UOM  
Update PO

Minimum Quantity 1.0000  
Maximum Quantity 0.0000 Order Quantity Multiple

**Conversion to Item Base UOM**

\*Rate Type Standard  \*Qty Precision Decimal  **Rounding Rule**  
Std UOM Rate  Natural Round  
 Round Up  
Get Std Rate

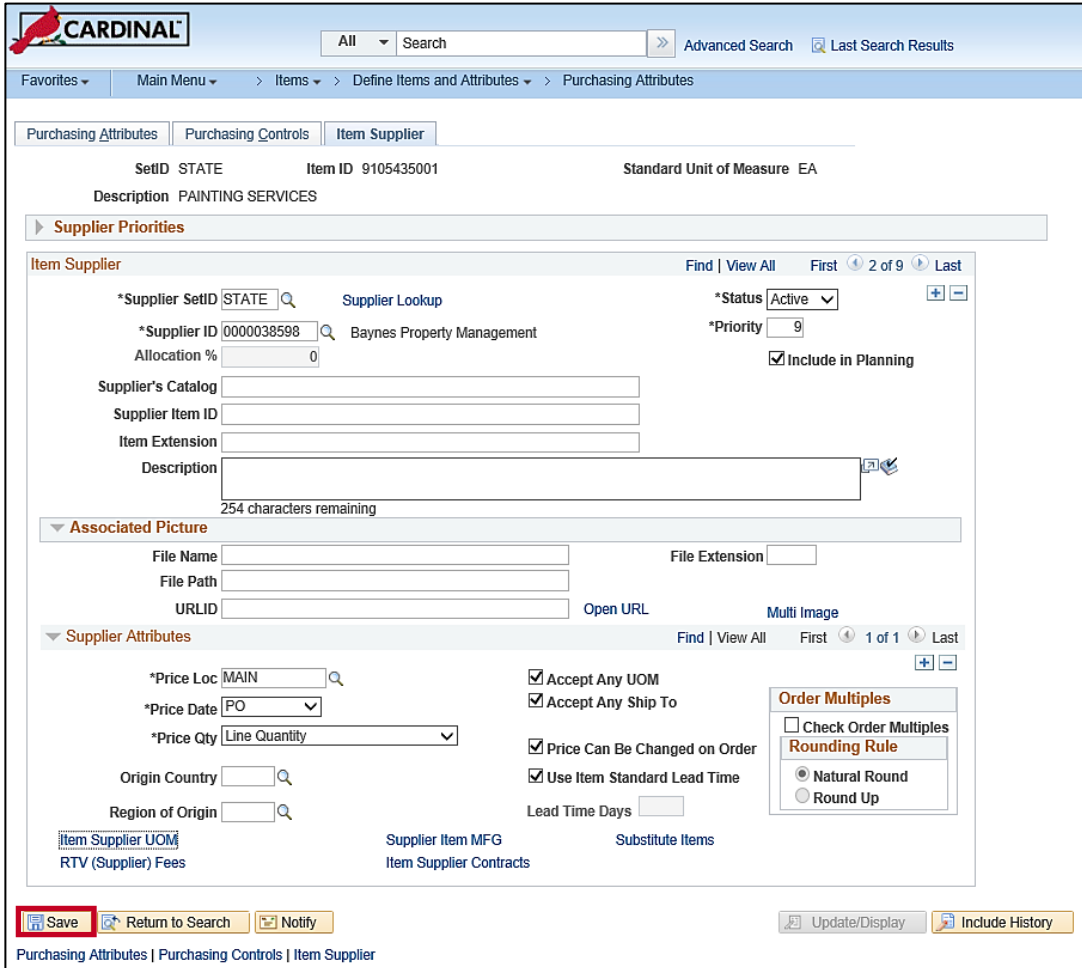
**UOM Price Attributes** Find | View All First 1 of 1 Last

\*Effective Date 02/18/2017  \*Currency Code USD   
\*Status Active  Supplier Price 3500.00000  
\*Minimum Quantity 1.0000 Standard Price Update Status No Update   
Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

**Matching Controls**

19. The **Qty Precision** value defaults to **Whole Number** and should be changed to **Decimal**.
20. Click the **OK** button.

21. The **Purchasing Attributes** page displays.



**CARDINAL** All Search Advanced Search Last Search Results

Favorites Main Menu Items Define Items and Attributes Purchasing Attributes

Purchasing Attributes Purchasing Controls Item Supplier

SetID STATE Item ID 9105435001 Standard Unit of Measure EA  
Description PAINTING SERVICES

Supplier Priorities

Item Supplier Find | View All First 2 of 9 Last

\*Supplier SetID STATE Supplier Lookup \*Status Active  
\*Supplier ID 0000038598 Baynes Property Management \*Priority 9  
Allocation % 0  Include in Planning  
Supplier's Catalog  
Supplier Item ID  
Item Extension  
Description  
254 characters remaining

Associated Picture  
File Name File Extension  
File Path  
URLID Open URL Multi Image

Supplier Attributes Find | View All First 1 of 1 Last

\*Price Loc MAIN \*Price Date PO \*Price Qty Line Quantity  
Origin Country Region of Origin  
 Accept Any UOM  Accept Any Ship To  
 Price Can Be Changed on Order  Use Item Standard Lead Time  
Lead Time Days  
Order Multiples  
 Check Order Multiples  
Rounding Rule  
 Natural Round  
 Round Up

item Supplier UOM Supplier Item MFG Substitute Items  
RTV (Supplier) Fees Item Supplier Contracts

Save Return to Search Notify Update/Display Include History

Purchasing Attributes | Purchasing Controls | Item Supplier

22. Click the **Save** button. The item supplier relationship is now set.

**Create Item/Supplier Relationship: Strategic Sourcing Event**

Upon selection and posting of the award to the bidder, the supplier/item relationship is automatically established. The item is now available to be added to any contract specific to this supplier.

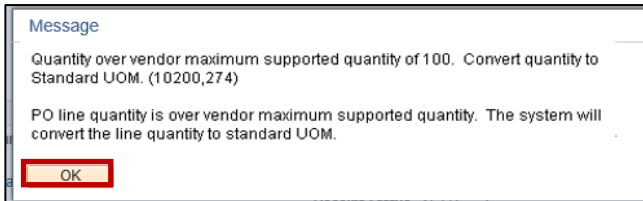
Please refer to the course entitled **PR345: Strategic Sourcing**, located on the Cardinal website in **Course Materials** under **Learning**, for additional details on creating and awarding events.

**Create Item/Supplier Relationship: Purchase Order**

Item/supplier relationships are not required when creating ad-hoc purchase orders. Cardinal allows the user to select any item or category for insertion into a line. POs may also be created from sourcing events or contracts.

Please refer to the course entitled **PR344: Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Learning**, for details on creating POs.

1. When entering a PO from a sourcing event where the quantity on the PO is greater than the quantity on the sourcing event, a message similar to the one below may display:



2. Click the **OK** button.
3. As the **Maximum Quantity** and **Supplier Price** default in from the sourcing event or contract, you may need to update the **Purchasing Attributes** on the **Item/Supplier Relationship** page in order to proceed.
4. Using the **Item ID** from the event or contract award, find the item and follow the steps in the section above entitled [Created a New Item/Supplier Relationship](#).

Supplier's UOM and Pricing Information Help

SetID STATE      Item ID 9105435001      PAINTING SERVICES  
 Supplier 0000038598 Baynes Property Management      Location MAIN

**Unit Of Measure** Find | View All    First 1 of 1 Last

\*UOM EA  Each  Default Packing Details + -  
Effective Dated UOM  
Update PO

Minimum Quantity  1.0000  
**Maximum Quantity**  0.0000      Order Quantity Multiple

**Conversion to Item Base UOM**

\*Rate Type Standard       **\*Qty Precision** Decimal  **Rounding Rule**  
 Natural Round  
 Round Up

Std UOM Rate  Get Std Rate

**UOM Price Attributes** Find | View All    First 1 of 1 Last

\*Effective Date 02/18/2017        \*Currency Code USD

\*Status Active        **Supplier Price**  3500.00000

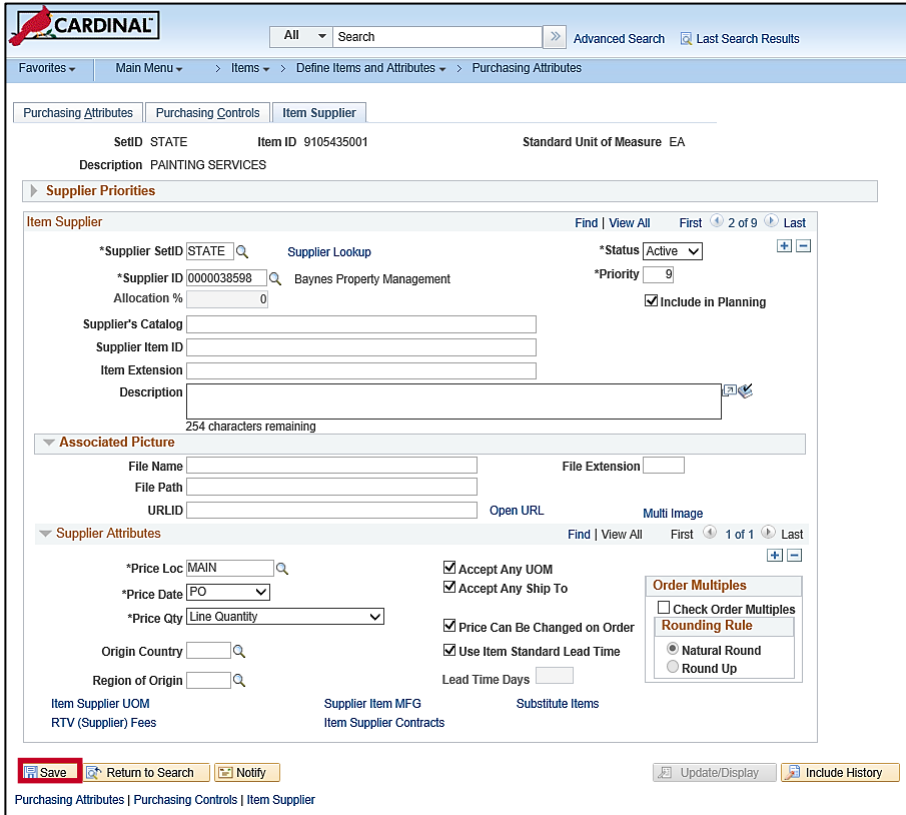
\*Minimum Quantity  1.0000      Standard Price Update Status No Update

Qty Rcvd Tolerance %  0.00      BU Price Update Status No Update

5. Find the supplier on the **Purchasing Attributes** page
6. Using the **Item Supplier UOM** link, update the **Maximum Quantity**, **Supplier Price**, and **Qty Precision** values, as needed.
7. Click the **OK** button.



8. The **Purchasing Attributes** page displays.



9. Click the **Save** button.

10. Upon **Save**, the item/supplier relationship is updated with your changes.

### Create Item/Supplier Relationship: Procurement Contract

When entering a contract using the **Item** lookup, the items listed are narrowed down to items related to the supplier selected. If the item you are searching for is not available in the list, you will need to create the relationship by following the steps noted in the section entitled [Create a New Item/Supplier Relationship](#).

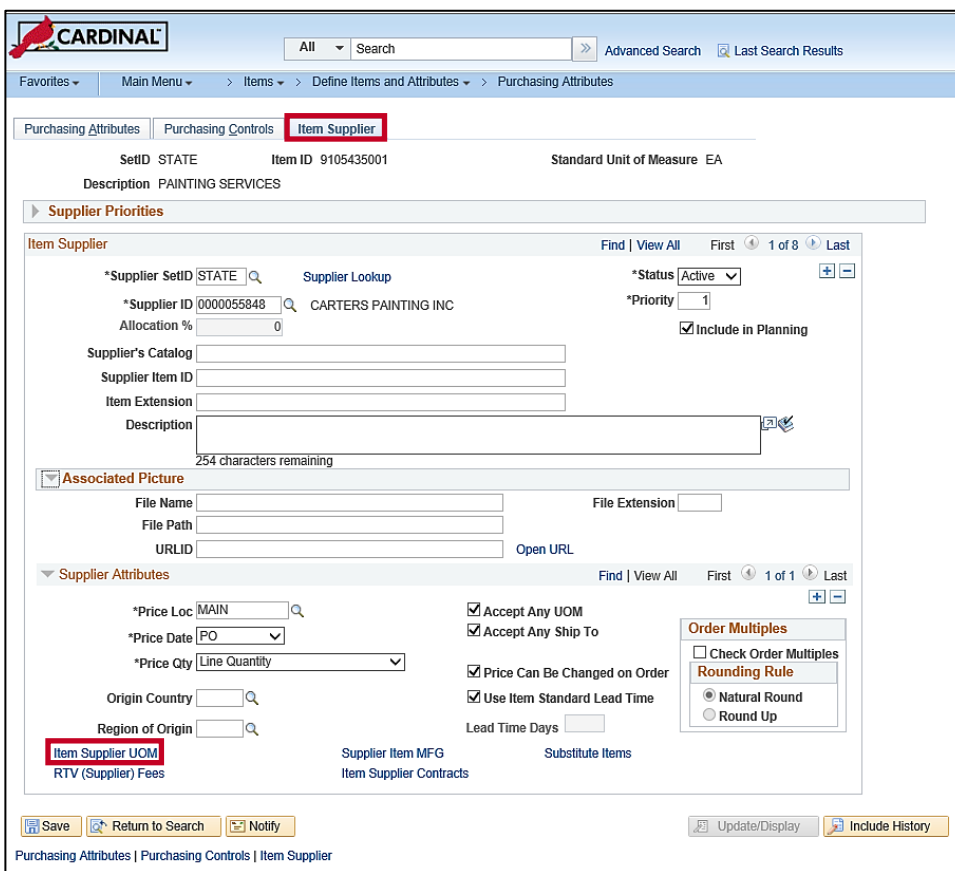
Please refer to the course entitled **501 PR348 Procurement Contracts**, located on the Cardinal website in **Course Materials** under **Learning**, for details on creating contracts.

## Add an Item Unit of Measure (UOM)

Contact the VITA helpdesk to request a new **UOM** type. Be sure to reference Cardinal in the helpdesk request. Once your helpdesk request is complete, you may add the new **UOM** to an item/supplier relationship.

Example: Item 9105435001, Painting Services, has a **UOM** of **EA** (each). Item 9105435000, Painting Services, has a **UOM** of **HUR** (hour). You need to have a **UOM** of **FTK** (square foot), for a specific contract service. You can request that a new **UOM** be added via the helpdesk. Once the new **UOM** is added, you can set it up on the item/supplier relationship.

- Using the **Item ID**, find the item and follow the steps noted in the section above titled [Create a New Item/Supplier Relationship](#).

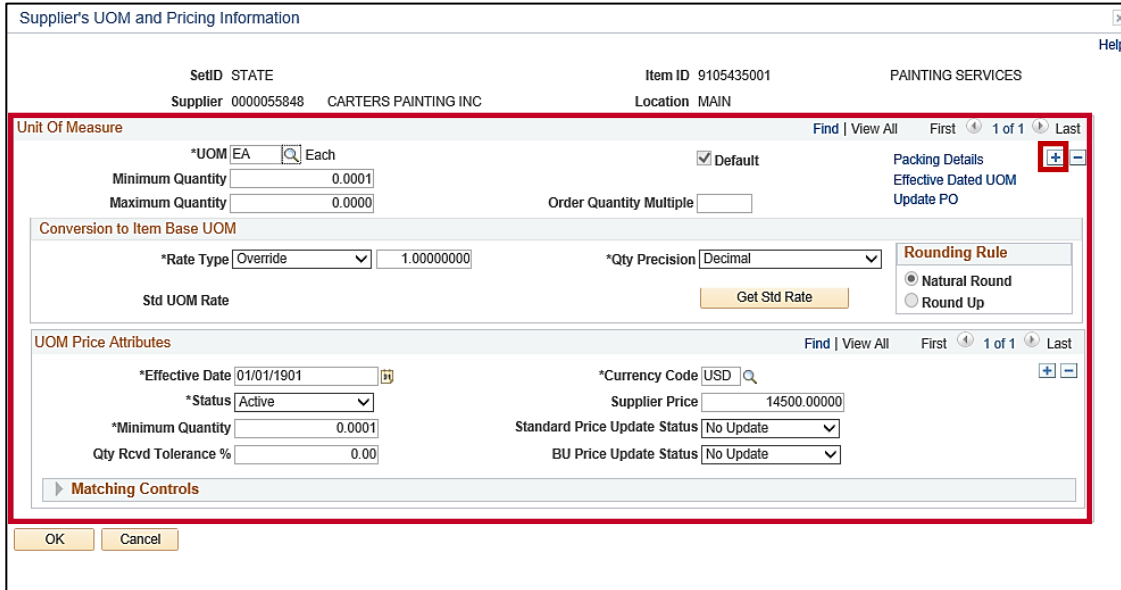


The screenshot shows the 'Item Supplier' configuration page in the Cardinal system. The page is titled 'Item Supplier' and is part of the 'Purchasing Attributes' section. The 'Item Supplier' tab is selected. The page displays the following information:

- SetID:** STATE
- Item ID:** 9105435001
- Standard Unit of Measure:** EA
- Description:** PAINTING SERVICES
- Supplier Priorities:** A table with 1 of 8 entries.
- Item Supplier:**
  - \*Supplier SetID: STATE
  - \*Supplier ID: 0000055848
  - Supplier Name: CARTERS PAINTING INC
  - Allocation %: 0
  - \*Status: Active
  - \*Priority: 1
  - Include in Planning
  - Supplier's Catalog: [Empty]
  - Supplier Item ID: [Empty]
  - Item Extension: [Empty]
  - Description: [Empty]
- Associated Picture:**
  - File Name: [Empty]
  - File Extension: [Empty]
  - File Path: [Empty]
  - URLID: [Empty]
  - Open URL: [Empty]
- Supplier Attributes:**
  - \*Price Loc: MAIN
  - \*Price Date: PO
  - \*Price Qty: Line Quantity
  - Origin Country: [Empty]
  - Region of Origin: [Empty]
  - Accept Any UOM
  - Accept Any Ship To
  - Price Can Be Changed on Order
  - Use Item Standard Lead Time
  - Lead Time Days: [Empty]
  - Supplier Item MFG: [Empty]
  - Substitute Items: [Empty]
  - Item Supplier Contracts: [Empty]
  - RTV (Supplier) Fees: [Empty]
- Order Multiples:**
  - Check Order Multiples
  - Rounding Rule:**
    - Natural Round
    - Round Up

- On the **Items Supplier** tab, locate the supplier.
- Click the **Item Supplier UOM** link.

4. The **Supplier's UOM and Pricing Information** page displays.



Supplier's UOM and Pricing Information

SetID STATE Item ID 9105435001 PAINTING SERVICES  
Supplier 0000055848 CARTERS PAINTING INC Location MAIN

**Unit Of Measure** Find | View All First 1 of 1 Last  
\*UOM EA Each  Default  Packing Details  Effective Dated UOM  Update PO

Minimum Quantity 0.0001  
Maximum Quantity 0.0000 Order Quantity Multiple

**Conversion to Item Base UOM**  
\*Rate Type Override 1.00000000 \*Qty Precision Decimal  
Std UOM Rate  **Rounding Rule**  
 Natural Round  Round Up

**UOM Price Attributes** Find | View All First 1 of 1 Last  
\*Effective Date 01/01/1901 \*Currency Code USD  
\*Status Active Supplier Price 14500.00000  
\*Minimum Quantity 0.0001 Standard Price Update Status No Update  
Qty Rcvd Tolerance % 0.00 BU Price Update Status No Update

5. To add a new **UOM** to the relationship, click the (+) sign in the **Unit of Measure** section of the page.

Supplier's UOM and Pricing Information
Help

SetID STATE  
Supplier 0000055848 CARTERS PAINTING INC

Item ID 9105435001  
Location MAIN

PAINTING SERVICES

**Unit Of Measure** Find | View All First 2 of 2 Last

\*UOM    Default Packing Details + -

Minimum Quantity  Order Quantity Multiple  Effective Dated UOM

Maximum Quantity  Update PO

---

**Conversion to Item Base UOM**

\*Rate Type  \*Qty Precision  **Rounding Rule**

Std UOM Rate   Natural Round

Round Up

---

**UOM Price Attributes** Find | View All First 1 of 1 Last

\*Effective Date  \*Currency Code  + -

\*Status  \*Supplier Price

\*Minimum Quantity  Standard Price Update Status

Qty Rcvd Tolerance %  BU Price Update Status

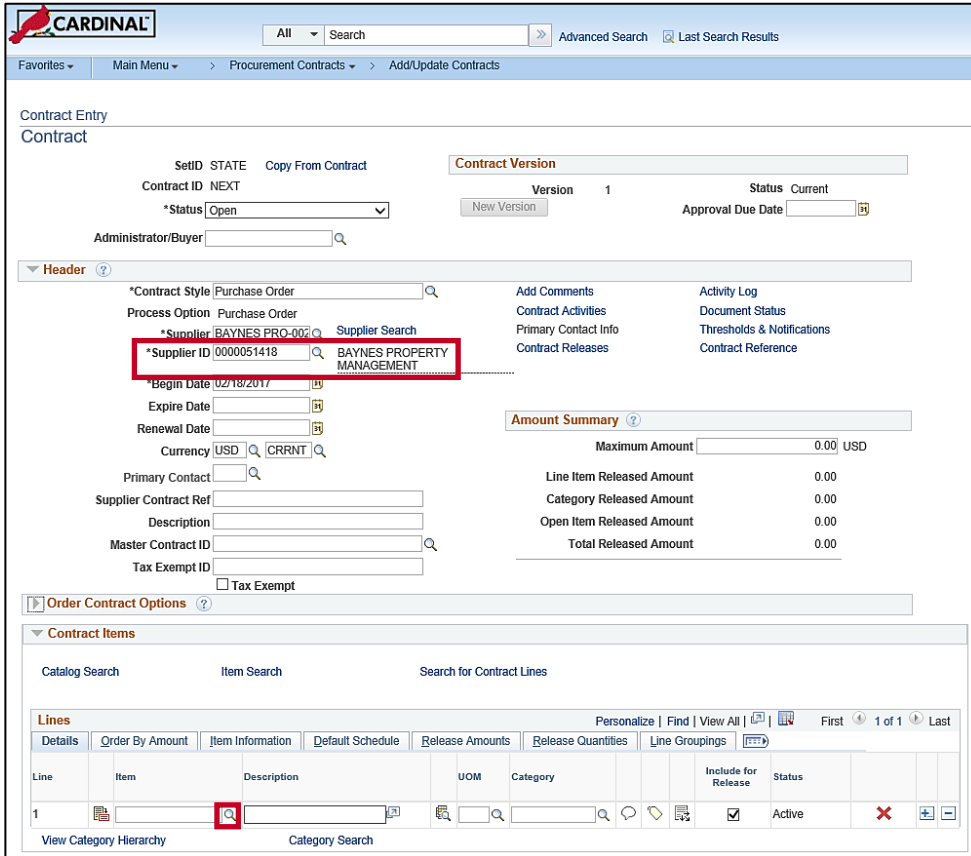
6. Select the new **UOM** using the **Look Up UOM** magnifying glass.
7. Update the **Qty Precision** to **Decimal**.
8. Enter a **Supplier Price**. Any value may be entered and this information will default on the PO.
9. Click the **OK** button.
10. The **Purchasing Attributes** page displays.
11. On the **Purchasing Attributes** page click the **Save** button. The item is now set up with the additional UOM and is available for selection when using this supplier.

### Example: Update the UOM on a Procurement Contract

Previously, we added the new **UOM** of **FTK** on the item (**9105435001**)/supplier (**000051418**) relationship.

1. To use this **UOM** on a procurement contract, navigate to **Contract Entry – Contract** using the following path:

### Main Menu > Procurement Contracts > Add/Update Contracts



**Contract Entry**  
Contract

SetID STATE Copy From Contract  
Contract ID NEXT  
\*Status Open  
Administrator/Buyer

**Contract Version**  
Version 1 Status Current  
New Version Approval Due Date

**Header**

\*Contract Style Purchase Order  
Process Option Purchase Order  
\*Supplier BAYNES PRO-002  
\*Supplier ID 0000051418 BAYNES PROPERTY MANAGEMENT  
\*Begin Date 02/18/2017  
Expire Date  
Renewal Date  
Currency USD CRRNT  
Primary Contact  
Supplier Contract Ref  
Description  
Master Contract ID  
Tax Exempt ID  Tax Exempt

**Amount Summary**

Maximum Amount	0.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	0.00
Total Released Amount	0.00

**Contract Items**

Catalog Search Item Search Search for Contract Lines

**Lines**

Line	Item	Description	UOM	Category	Include for Release	Status
1					<input checked="" type="checkbox"/>	Active

**Note:** For additional details on creating contracts please refer to the course entitled **PR348: Procurement Contracts**, located on the Cardinal website in **Course Materials** under **Learning**.

2. Create a contract using **Supplier ID 000051418**.
3. Click the **Look up Contract Line Type ID** icon to select the **Item ID 9105435001**.

Look Up Contract Line Type ID Help

Supplier SetID STATE  
 Supplier ID 0000051418  
 Item SetID STATE  
 Item ID begins with   
 Item Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-6 of 6 Last

Item ID	Item Description
6404460000	PACKING LIST ENVELOPES, SELF-A
8015801000	SIGNS: BILLBOARD, ADVERTISING,
9105435001	PAINTING SERVICES
9716001000	PROPERTY MANAGEMENT SERVICES
9883601000	GROUNDS MAINTENANCE: MOWING, E
9883642000	GROUNDS MAINTENANCE: MOWING, E

- The items listed are narrowed down to items related to the supplier selected.
- Click the **Item Id 9105435001** link.

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize Find View All First 1 of 1 Last

Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings

Line	Item	Description	UOM	Category	Include for Release	Status
1	9105435001	PAINTING SERVICES	EA	9105435	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

- The default **UOM** of **EA** is automatically populated.
- Click the **Line Details** icon to the left of the **Item**.

8. The **Details for Line X** page displays.

Details for Line 1 Help

Contract ID NEXT      Version 1      Supplier BAYNES PRO-002  
 Line 1      Item ID 9105435001      PAINTING SERVICES PAINTING SER

---

**Line Details**

Category 9105435 Status Active  
 Description      Physical Nature Goods  
 Category ID 04244

Transaction Item Description:  
 PAINTING SERVICES PAINTING SERVICES

219 characters remaining  
 Preferred Language Item Description:  
 PAINTING SERVICES PAINTING SERVICES

Expand All    Collapse All

▶ **Item Information**

▶ **Release Amounts / Quantities**

▼ **Pricing Information**

Use Contract Base Price       Use Supp Price UOM Adjustments  
 Price Can Be Changed on Order       Use Supplier Price Shipto Adj

Price Date PO Date      Adjust Before Contract Adjustments  
 Price Qty Line Quantity      **Order By Amount**  
 Qty Type Current Order Quantity       Amount Only  
 Merchandise Amount

---

**Schedule Defaults**

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

**UOM/Pricing**      Personalize | Find | View All | First 1 of 1 Last

	Price Loc	UOM	Base Price	Curr
<input checked="" type="checkbox"/>	MAIN	EA	3500.00000	USD

9. Expand the **Pricing Information** section by clicking on the arrow to the left of the section title.

10. Click the **UOM** lookup icon.

Look Up UOM
✕

[Help](#)

Unit of Measure

Description

Look Up
Clear
Cancel
Basic Lookup

#### Search Results

View 100   First   1-2 of 2   Last

Unit of Measure	Description
EA	Each
FTK	Square Foot

11. Both **UOMs** are available.
12. Select the **Square Foot** link.

**Transaction Item Description:**  
PAINTING SERVICES PAINTING SERVICES

219 characters remaining

**Preferred Language Item Description:**  
PAINTING SERVICES PAINTING SERVICES

[Expand All](#)   [Collapse All](#)

**Item Information**

**Release Amounts / Quantities**

**Pricing Information**

Use Contract Base Price  
 Price Can Be Changed on Order  
 Price Date   
 Price Qty   
 Qty Type

Use Supp Price UOM Adjustments  
 Use Supplier Price Shipto Adj  
 Adjust   
**Order By Amount**  
 Amount Only  
 Merchandise Amount

**Schedule Defaults**

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing		Personalize	Find	View All	First	1 of 1	Last
<input checked="" type="checkbox"/>	Price Loc	UOM	Base Price	Curr			
<input checked="" type="checkbox"/>	MAIN	FTK	1.00000	USD			

13. The **FTK** (i.e., square foot), **UOM** is populated.
14. Click the **OK** button and complete the contract entry procedures.

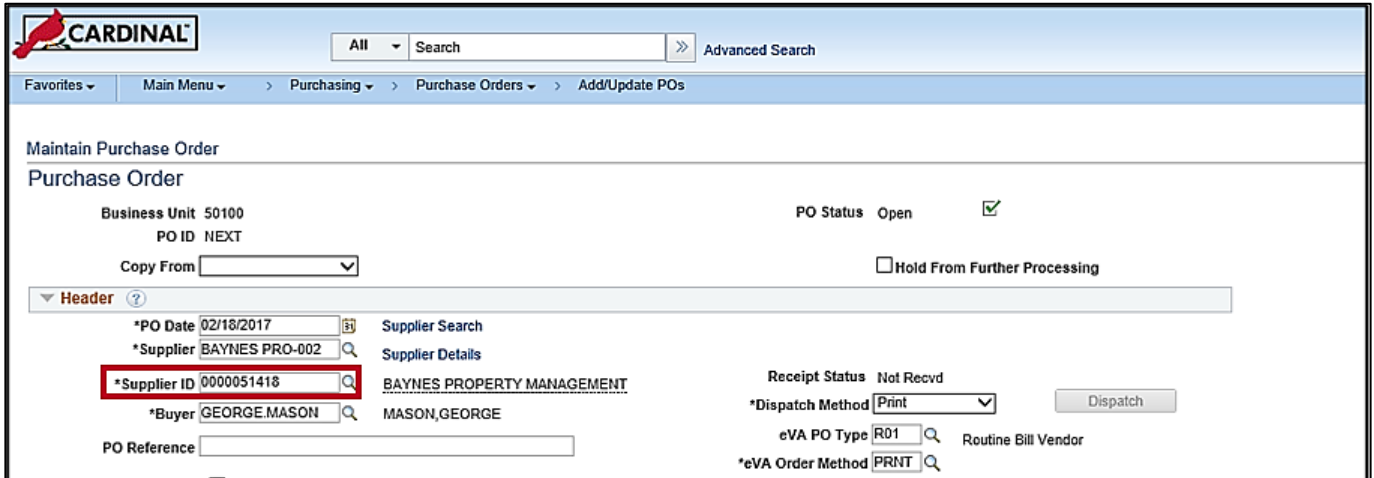


### Example: Update the UOM on a Purchase Order

Previously we added the new **UOM** of **FTK** on the item (9105435001)/supplier (000051418) relationship.

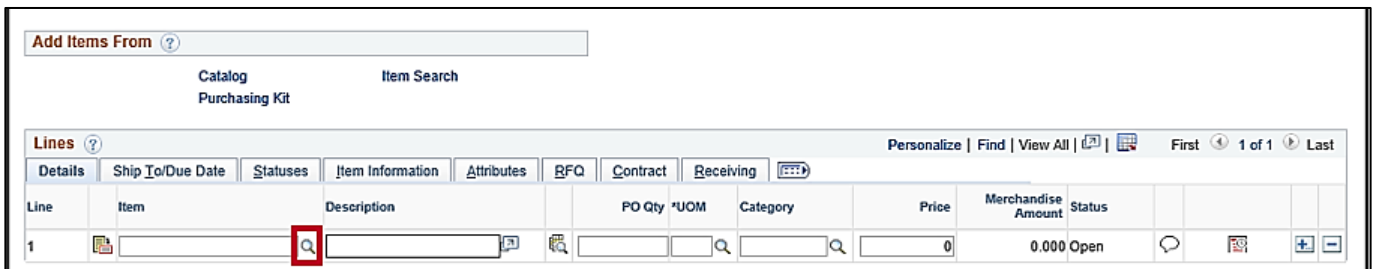
- To use this **UOM** on a PO, navigate to the **Maintain Purchase Order – Purchase Order** page using the following path:

**Main Menu > Purchasing > Purchase orders > Add/Update Pos**

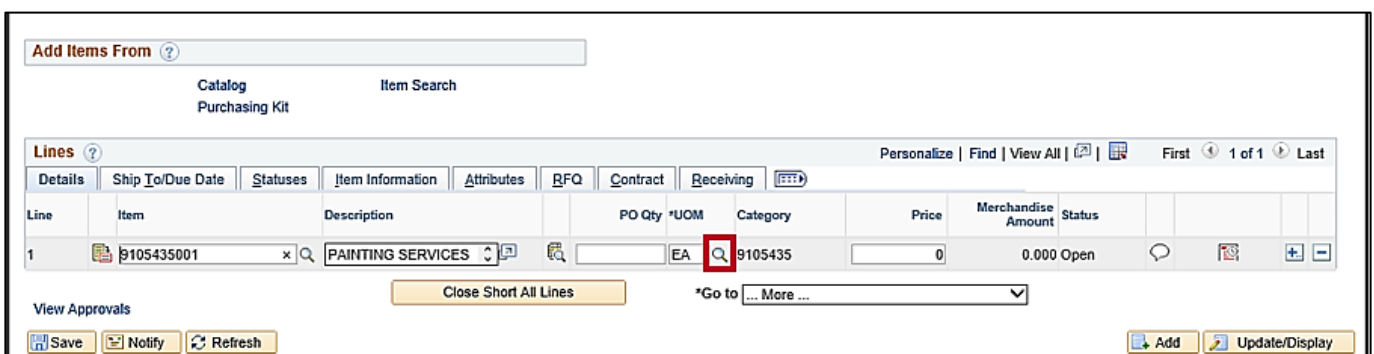


**Note:** For additional details on creating contracts, please refer to the course entitled **PR344 Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Learning**.

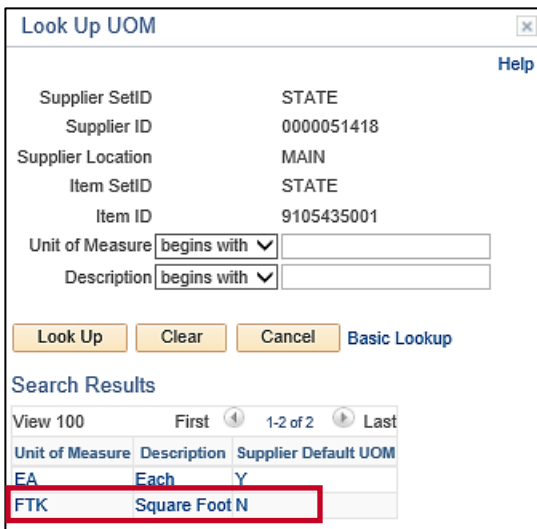
- Create a PO using **Supplier ID 000051418**



- Follow normal PO procedures, as referenced in the course entitled **PR344: Processing Purchase Orders**, to find and select the **Item 9105435001**.

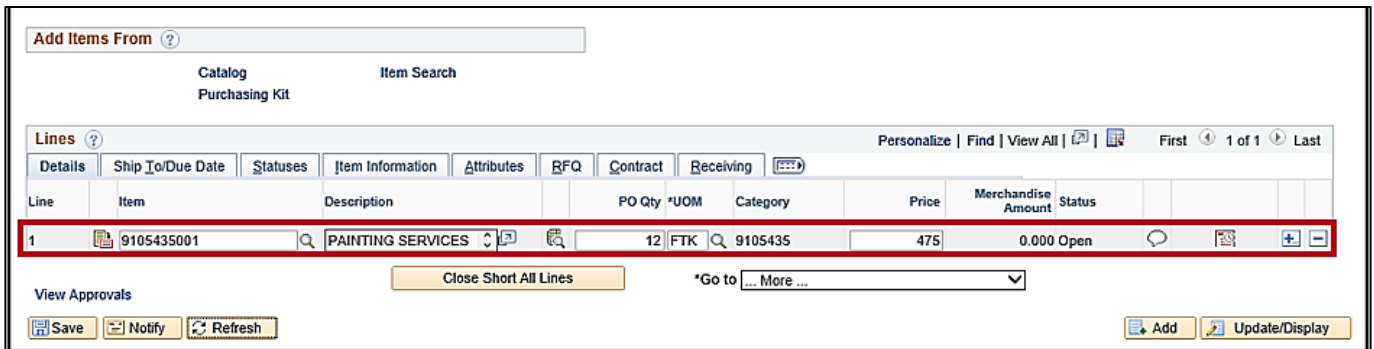


- The default **UOM** of **EA** is automatically populated.
- Click the **Look up UOM** icon.



Unit of Measure	Description	Supplier Default UOM
EA	Each	Y
FTK	Square Foot N	

- All **UOMs** for this item supplier relationship display and may be selected.
- Click the **FTK Unit of Measure** link.



Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	9105435001	PAINTING SERVICES	12	FTK	9105435	475	0.000	Open

PO line information updates based on the selected UOM and is ready for completion.

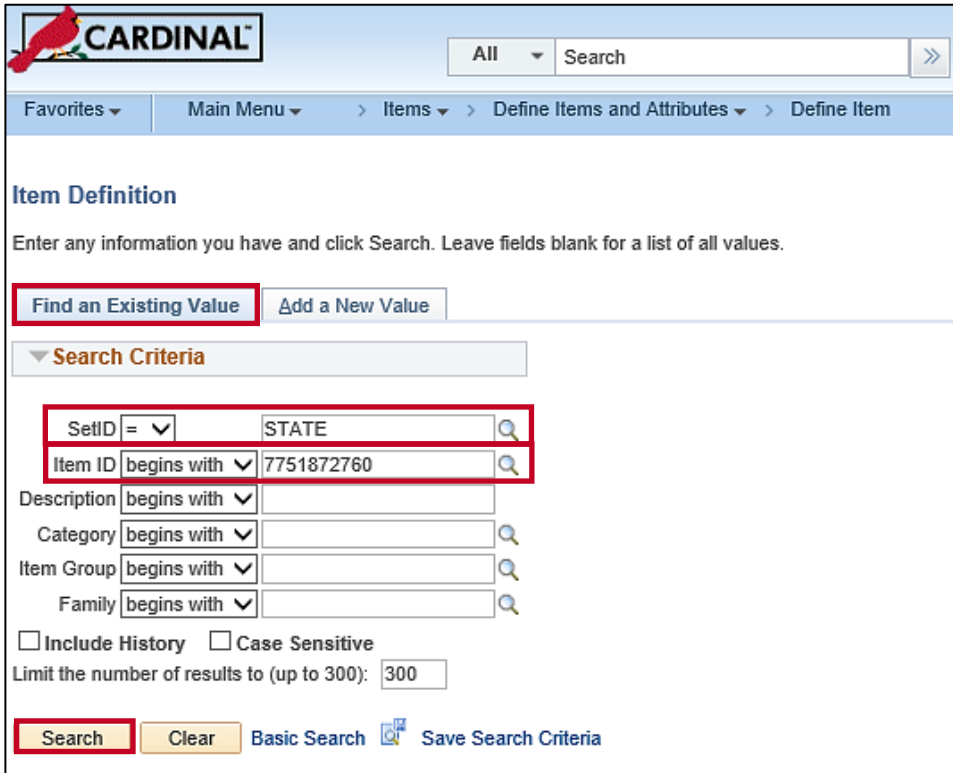
- Follow normal PO procedures, as referenced in the course entitled **PR344: Processing Purchase Orders**, to complete your PO.



## Inactivate an Item

1. Once an NIGP number/**Item ID** is entered into Cardinal it cannot be modified or deleted. However, you can make changes, inactivate, and in some cases, reactivate the **Item ID**. To inactivate an **Item ID**, navigate to the **Item Definition** page using the following path:

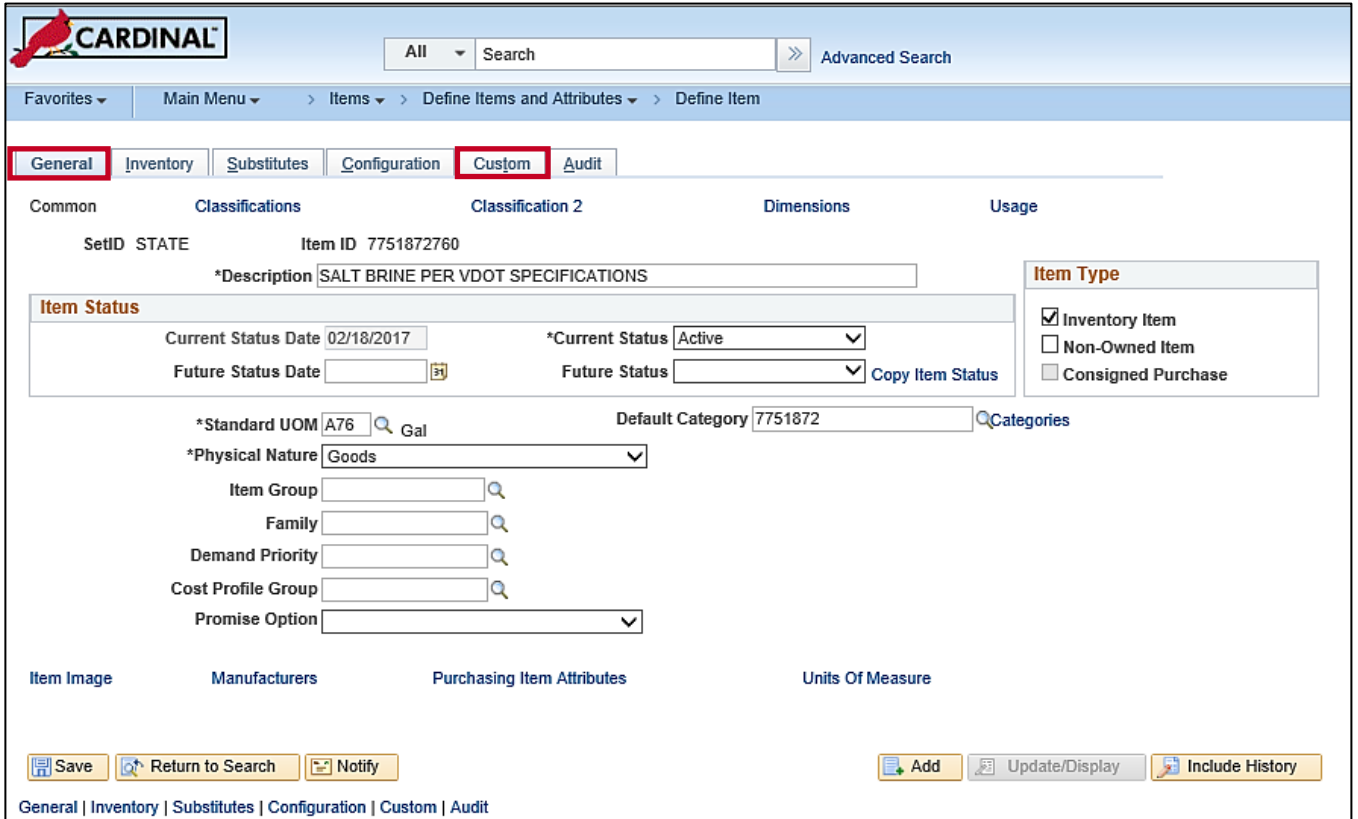
**Main Menu > Items > Define Items and Attributes > Define Item**



The screenshot shows the 'Item Definition' search page in the Cardinal system. At the top, there is a search bar with 'All' and 'Search' options. Below the search bar is a breadcrumb trail: 'Favorites > Main Menu > Items > Define Items and Attributes > Define Item'. The main heading is 'Item Definition', followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with a dropdown arrow. The search criteria include: 'SetID = STATE' (with a red box around the dropdown and text), 'Item ID begins with 7751872760' (with a red box around the dropdown and text), 'Description begins with', 'Category begins with', 'Item Group begins with', and 'Family begins with'. There are checkboxes for 'Include History' and 'Case Sensitive'. A text box for 'Limit the number of results to (up to 300):' contains the value '300'. At the bottom, there are buttons for 'Search' (highlighted with a red box), 'Clear', 'Basic Search', and 'Save Search Criteria'.

2. Click the **Find an Existing Value** tab.
3. Ensure that **STATE** is listed in the **SETID** field.
4. Enter the NIGP number/**Item ID** you want to find.
5. Click the **Search** button.

6. The **General** tab displays.



**CARDINAL** All Search Advanced Search

Favorites Main Menu Items Define Items and Attributes Define Item

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

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

\*Description SALT BRINE PER VDOT SPECIFICATIONS

**Item Status**

Current Status Date 02/18/2017 \*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

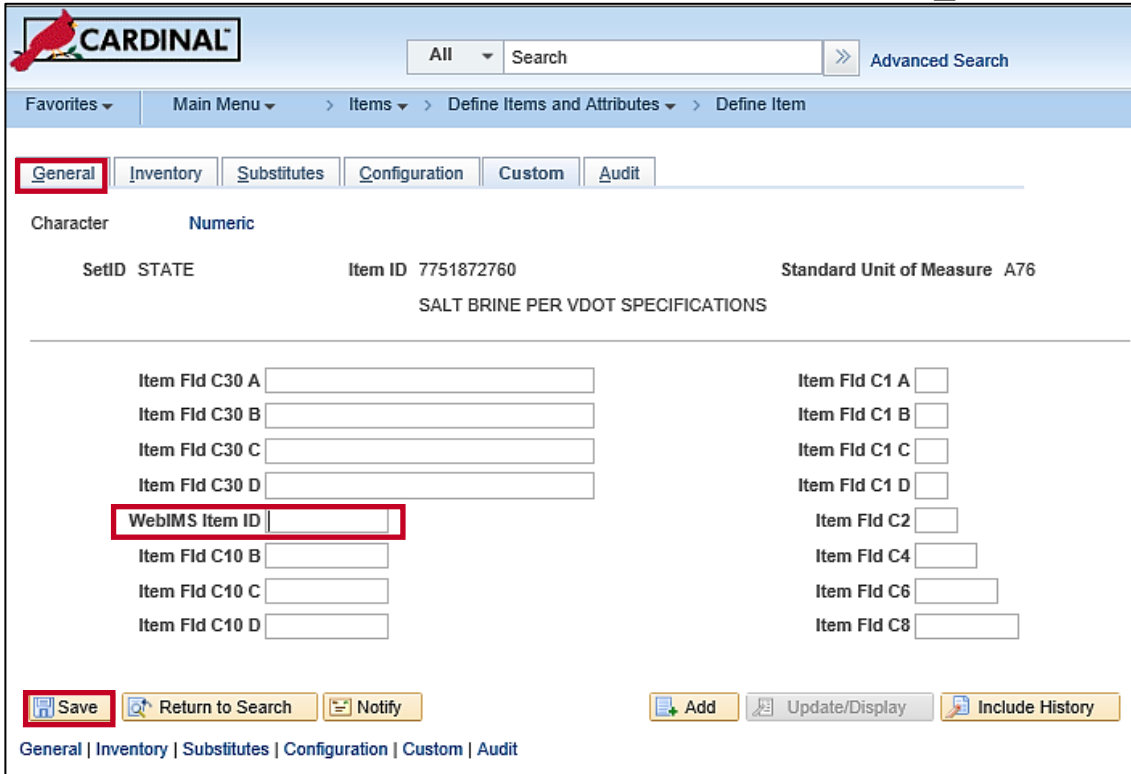
Promise Option

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

7. Click the **Custom** tab.



**CARDINAL** All Search Advanced Search

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  Item Fld C1 A

Item Fld C30 B  Item Fld C1 B

Item Fld C30 C  Item Fld C1 C

Item Fld C30 D  Item Fld C1 D

**WebIMS Item ID**  Item Fld C2

Item Fld C10 B  Item Fld C4

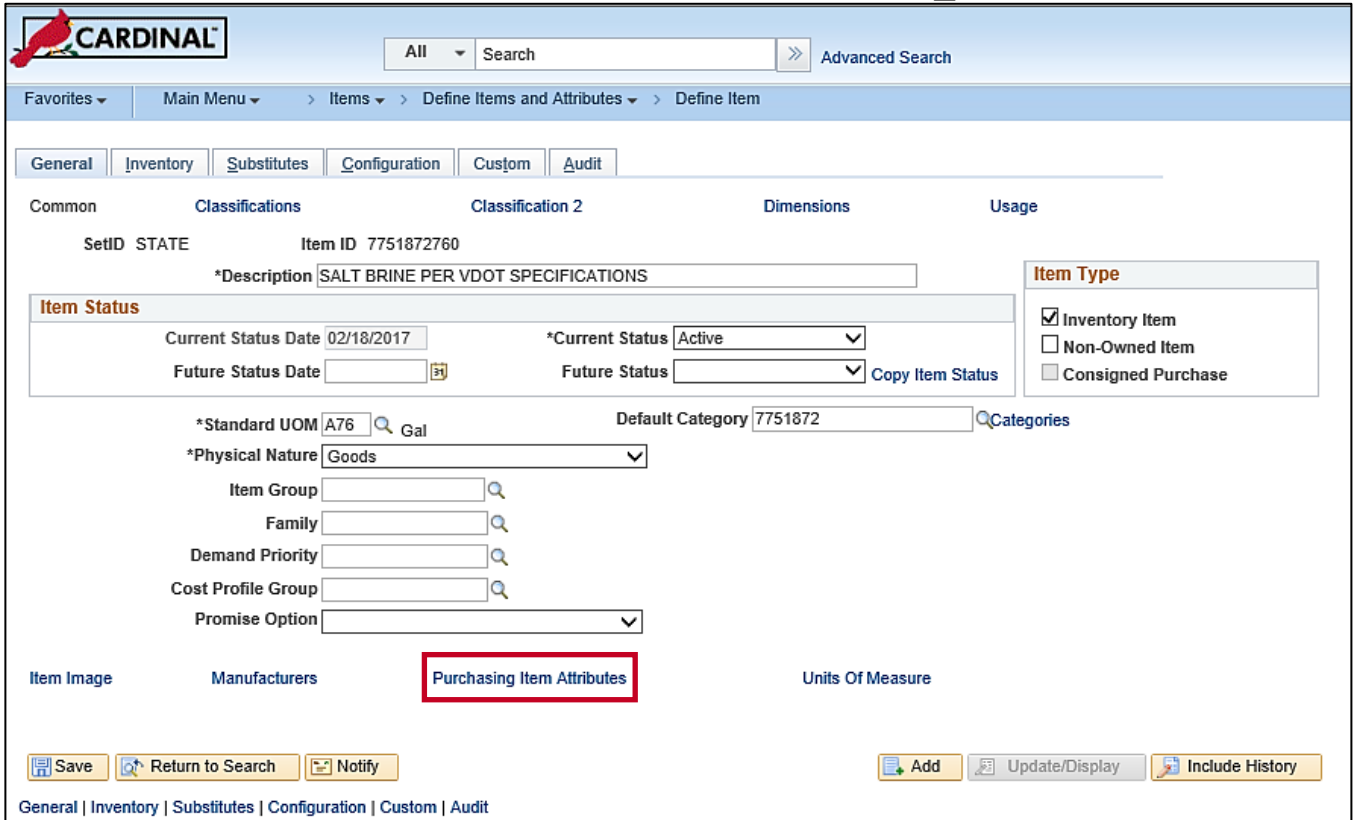
Item Fld C10 C  Item Fld C6

Item Fld C10 D  Item Fld C8

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

General | Inventory | Substitutes | Configuration | Custom | Audit

8. Remove the **WebIMS Item ID** value (stock number).
9. Click the **Save** button.
10. Click the **General** tab.



The screenshot shows the 'Define Item' page in the Cardinal system. The breadcrumb trail is: Favorites > Main Menu > Items > Define Items and Attributes > Define Item. The page has tabs for General, Inventory, Substitutes, Configuration, Custom, and Audit. The 'Configuration' tab is active, showing fields for 'SetID STATE', 'Item ID 7751872760', and '\*Description SALT BRINE PER VDOT SPECIFICATIONS'. The 'Item Status' section includes 'Current Status Date 02/18/2017', '\*Current Status Active', 'Future Status Date', and 'Future Status'. The 'Item Type' section has checkboxes for 'Inventory Item' (checked), 'Non-Owned Item', and 'Consigned Purchase'. Other fields include '\*Standard UOM A76 Gal', 'Default Category 7751872', '\*Physical Nature Goods', 'Item Group', 'Family', 'Demand Priority', 'Cost Profile Group', and 'Promise Option'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'. The 'Purchasing Item Attributes' link is highlighted with a red box.

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

Purchase Items Attributes

Purchasing Attributes | Purchasing Controls | Item Supplier

SetID STATE Item ID 7751872760 Standard Unit of Measure A76

Description SALT BRINE PER VDOT SPECIFICATIONS

PO Available Date 02/18/2017

**Unavailable 02/18/2017**

Use as Substitute Item Only

Standard Price A76

Last PO Price

\*Currency USD Dollar

Lead Time Days

\*Item Descr 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

220 characters remaining

Associated Picture

File Name

File Extension

Chartfields

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

\*Account 5012550 Task

Item Specifications Packing Details

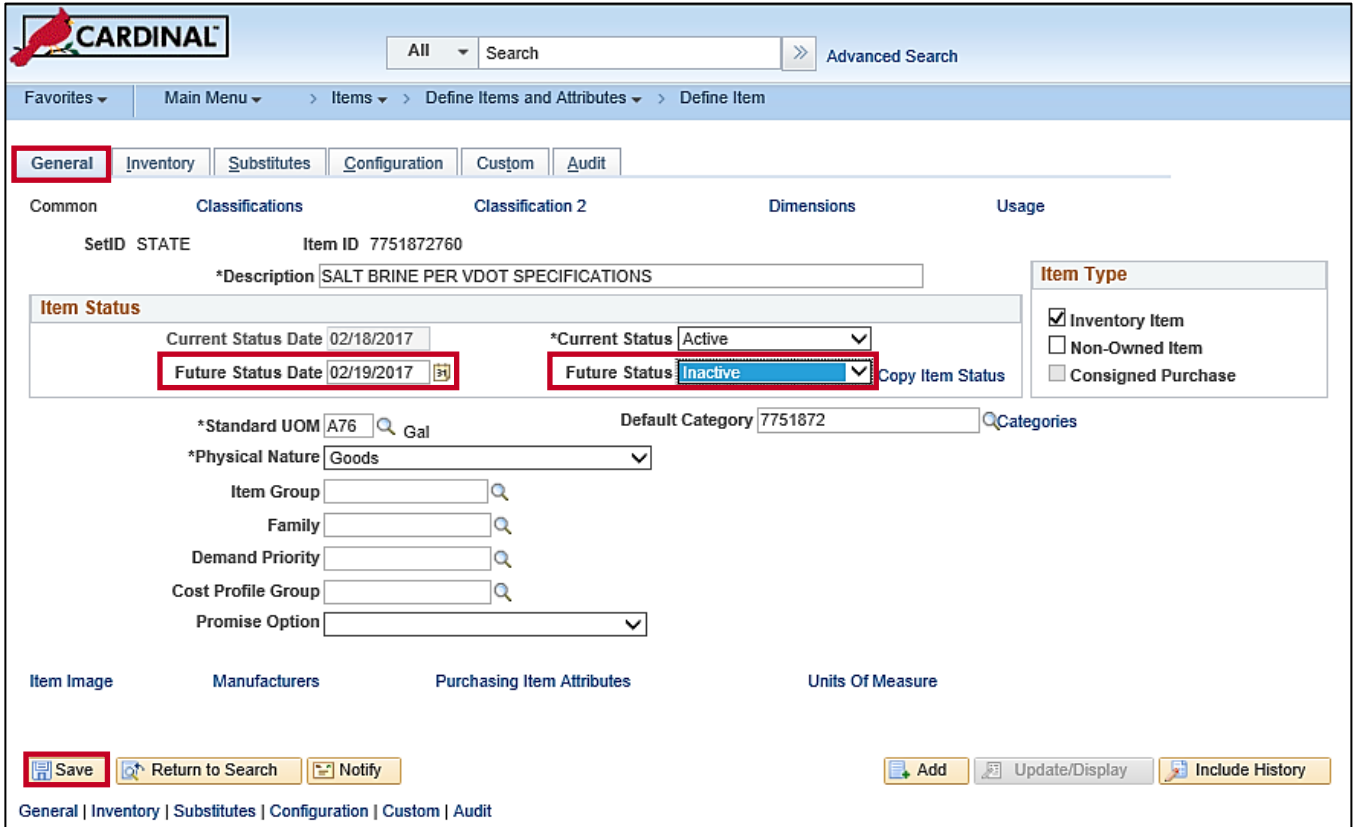
VAT Default VAT Service Treatment Setup

**OK** Cancel **Apply**

Purchasing Attributes | Purchasing Controls | Item Supplier

12. Change the **Unavailable** field date value to today's date.
13. Click the **Apply** button.
14. Click the **OK** button.

15. The **General** tab displays.



The screenshot shows the 'Define Item' page in the Cardinal system. The 'General' tab is selected. The item description is 'SALT BRINE PER VDOT SPECIFICATIONS'. The 'Item Status' section shows 'Current Status' as 'Active' and 'Future Status' as 'Inactive'. The 'Future Status Date' is set to 02/19/2017. The 'Save' button is highlighted with a red box. Other fields include 'Standard UOM' (A76 Gal), 'Physical Nature' (Goods), and 'Default Category' (7751872).

16. Change the **Future Status Date** field to tomorrow's date.

17. Select **Inactive** from the **Future Status** drop-down menu.

18. Click the **Save** button. Your entries are saved and the item is unavailable effective immediately.