



Adding 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 the user 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).

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
9/20/2023	Baseline.



Understanding Items

The item code structure used in Cardinal Procurement is the National Institute of Governmental Purchasing (NIGP) standard. NIGP establishes categories that group the item codes into commodities, which are represented by a three-digit class code, five-digit class-item code, and a seven-digit class-item-group code. 10-digit Item IDs have specific Descriptions and Units of Measure (UOM).

The Cardinal Procurement module 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 the user may logically navigate to an item. A Category ID has three, five, or seven digits and the Description and UOM may be edited.

There are two categories of NIGP numbers or Class Codes (represented by the first 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.

Digits	Category	Example	Description
Digits 1-3	Class	750	Road Materials Not Asphaltic
Digits 1-5	Class-Item	75077	Sand and Gravel
Digits 1-7	Class-Item-Group	7507731	Gravel
Digits 1-10	Class-Item-Group-Detail	7507731047	No. 9 Gravel, 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.

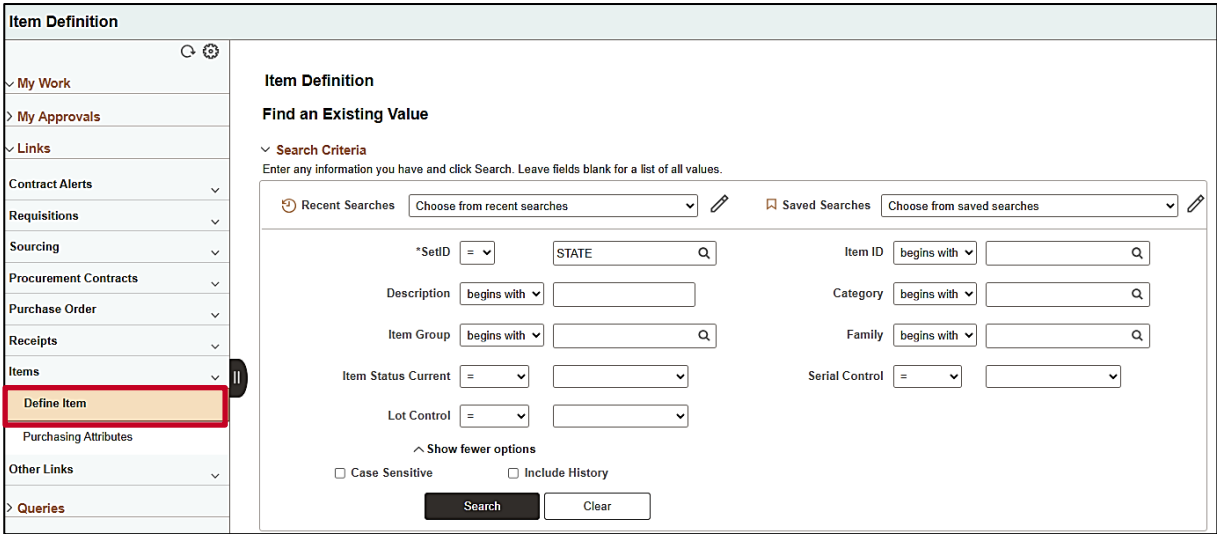
Once confirmed that the desired Item does not exist in Cardinal, contact the ASD or Fiscal Division to have it added.

Inventory items (i.e., in WebIMS) must be assigned IMS Stock Numbers before being added to Cardinal. Once WebIMS is updated, the new 10-digit NIGP number/Item ID can be assigned.

A few other notes on Items:

- Items and categories in Cardinal match NIGP and eVA item numbering.
- Item/Supplier relationships are required when building contracts.
- Item/Supplier relationships are not required when building requisitions, purchase orders (PO), and sourcing events.

Searching for an Item

Step	Action
1.	Navigate to the Item Definition page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Items > Define Item Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Item Definition page using the following navigation path: NavBar > Menu > Items > Define Items and Attributes > Define Item



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	The Item Definition Find an Existing Value Search page displays. Item Definition Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches *SetID = STATE Item ID begins with Description begins with Category begins with Item Group begins with Family begins with Item Status Current = Serial Control = Lot Control = ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear
3.	Ensure that “STATE” is entered in the SetID field. *SetID = STATE
4.	Enter search terms using the various search criteria fields. *SetID = STATE Item ID begins with Description contains BRINE Category begins with Item Group begins with Family begins with Item Status Current = Serial Control = Lot Control =
5.	Click the Search button. Search Clear



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
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The **Search Results** section displays all items that match the search term(s).

▼ **Search Results**

5 results - SetID "STATE" Description "BRINE"

< < 1-5 of 5 > > View All									
SetID	Item ID	Description	Category	Item Group	Family	Item Status Current	Serial Control	Lot Control	
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)	Active	N	N	>
STATE	7656641160	Electric Valve Body, Brine App	7656641	(blank)	(blank)	Active	N	N	>
STATE	7656641158	Meter, Flow Brine Applicator (	7656641	(blank)	(blank)	Active	N	N	>
STATE	7656641159	Meter, Flow w/Sensor, Brine Ap	7656641	(blank)	(blank)	Active	N	N	>
STATE	5456501000	SALT BRINE PRODUCTION	5456501	(blank)	(blank)	Active	N	N	>



If the item being searched for is listed, then it is an NIGP item and does not need to be added. In this case, proceed to check if the item is available. If the item is not listed, proceed to the [Adding a New Item](#) section in this job aid.

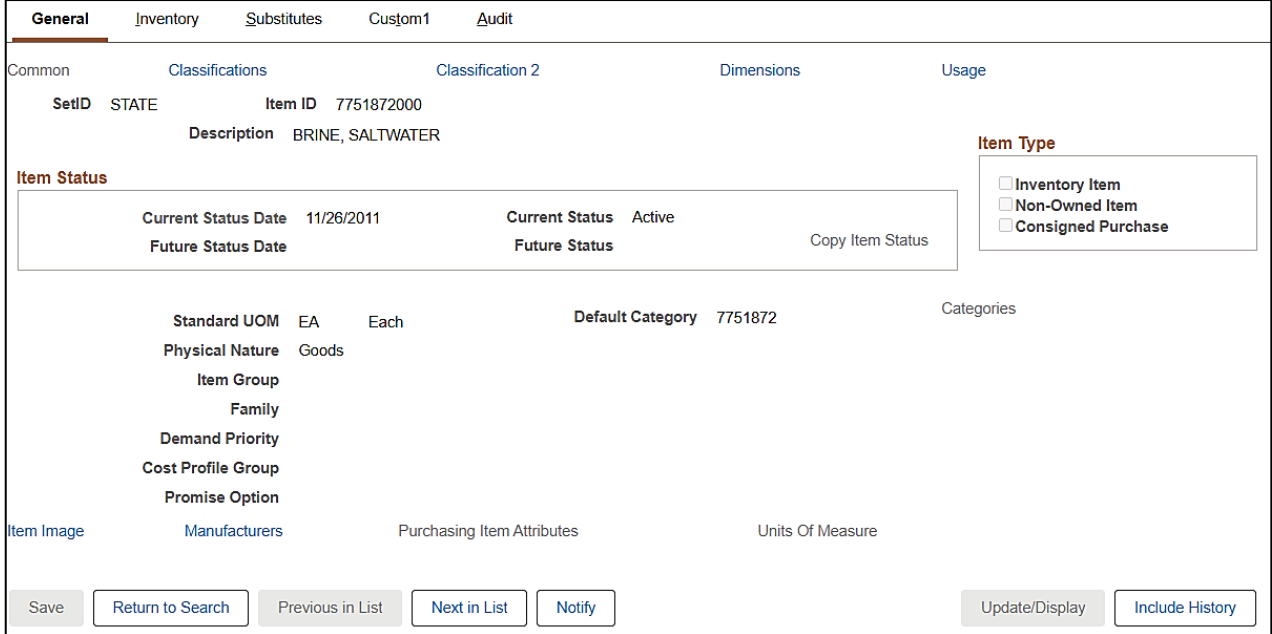
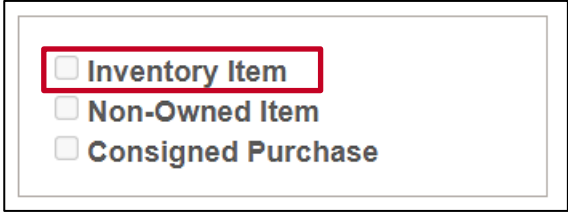
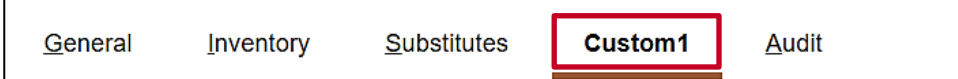
6. Click an item to view its attributes.

SetID	Item ID	Description	Category	Item Group	Family	Item Status Current	Serial Control	Lot Control	
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)	Active	N	N	>



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	The General tab displays by default. 
7.	The Standard UOM (Unit of Measure) values in Cardinal match those in WebIMS. The value assigned here interfaces to eVA. 
8.	Note that for all WebIMS items the Inventory Item checkbox is selected. 
9.	Click the Custom1 tab. 



Procurement Job Aid

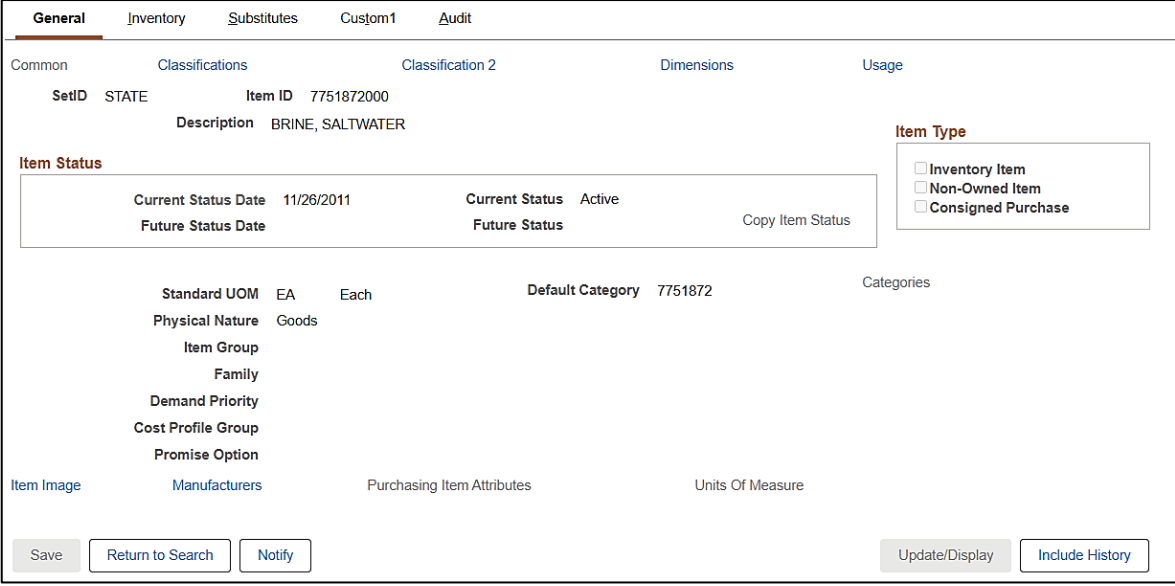
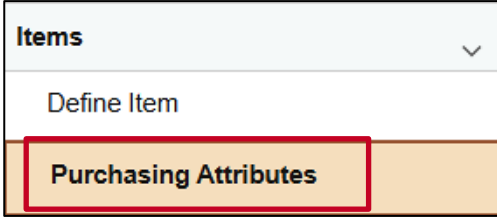
PR Adding Procurement Items (VDOT Only)

Step	Action
	The Custom1 tab displays. GeneralInventorySubstitutesCustom1Audit CharacterNumeric SetIDSTATEItem ID7751872000Standard Unit of MeasureEABRINE, SALTWATER Item Fld C30 AItem Fld C30 BItem Fld C30 CItem Fld C30 DWebIMS Item IDItem Fld C10 BItem Fld C10 CItem Fld C10 DItem Fld C1 AItem Fld C1 BItem Fld C1 CItem Fld C1 DItem Fld C2Item Fld C4Item Fld C6Item Fld C8 SaveReturn to SearchNotifyUpdate/DisplayInclude History
10.	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. WebIMS Item ID
11.	Click the General tab. GeneralInventorySubstitutesCustom1Audit



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	The General tab displays. 
12.	Click the Purchasing Attributes link in the WorkCenter under Links > Items. 



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

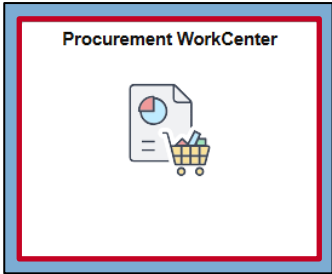
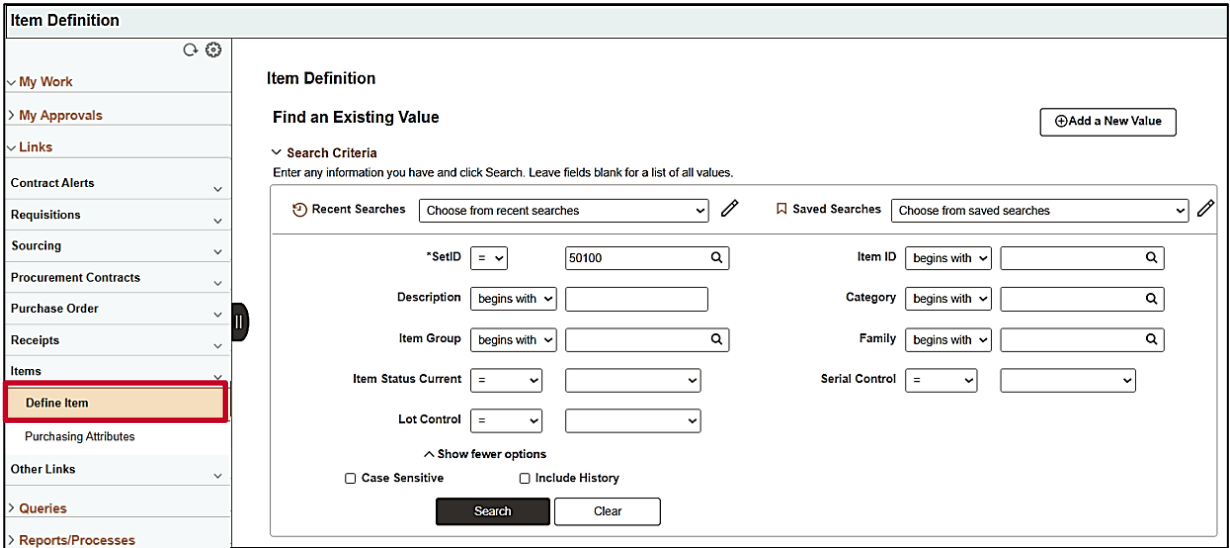
Step	Action				
	The Purchase Items Attributes page and Purchasing Attributes tab for the Item displays. Purchasing Attributes Purchasing Controls Item Supplier SetID STATE Item ID 7751872000 Standard Unit of Measure EA Description BRINE, SALTWATER PO Available Date 01/01/1900 Item Descr BRINE, SALTWATER BRINE, SAL Unavailable ☐ Use as Substitute Item Only Category 7751872 Standard Price 350.00000 EA Model Last PO Price 350.00000 Asset Profile ID Currency USD Dollar Ultimate Use Code Lead Time Days Physical Nature Goods Primary Buyer Long Description BRINE, SALTWATER BRINE, SALTWATER 221 characters remaining Associated Picture File Name File Extension Chartfields < < 1-1 of 1 > > View All <table><thead><tr><th>Account</th><th>Task</th></tr></thead><tbody><tr><td>5012550</td><td></td></tr></tbody></table> Item Specifications Packing Details VAT Default VAT Service Treatment Setup Save Return to Search Notify Update/Display Include History	Account	Task	5012550	
Account	Task				
5012550					
13.	Check the PO Available Date field. If it is earlier than today's date, the Item is available. PO Available Date 01/01/1900				
14.	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, users with the Fiscal Inventory Manager role can set up a new item in Cardinal.				

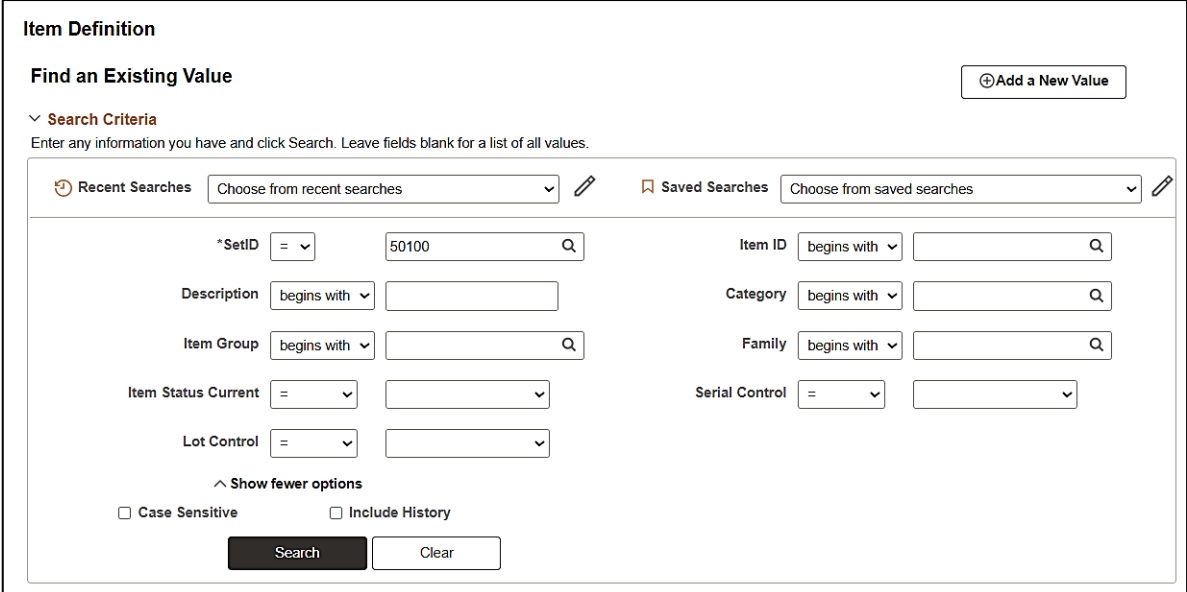
Adding a New Item ID in Cardinal

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

First, determine the new Item ID using the National Institute of Governmental Purchasing (NIGP) Code Structure. See the [Understanding Items](#) section in this job aid for more information.

To help determine this number, look up the appropriate category.

Step	Action
1.	Navigate to the Item Definition page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Items > Define Item Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Item Definition page using the following navigation path: NavBar > Menu > Items > Define Items and Attributes > Define Item

Step	Action
	The Item Definition Find an Existing Value Search page displays. 
3.	Enter "STATE" in the SetID field. 
4.	In the Item ID field, enter the first five or seven digits of the general category from the previous search. This allows the user to easily search for all items with this general category based on the NIGP Code Structure. (Refer to the Understanding Items section at the beginning of this job aid for the NIGP Code Structure). 
5.	Click the Search button. 



Step

Action

A complete listing displays of all items within the Class/Item/Group selected. Determine if there is numbering space available within this general NIGP category. If yes, use this general category and add the Detail number (last three digits of the NIGP) to it. This will be the complete 10-digit NIGP number for the new Item.

▼ Search Results

2 results - SetID "STATE" Item ID "7751872"

1-2 of 2

>

>|

View All

SetID	Item ID	Description	Category	Item Group	Family	Item Status Current	Serial Control	Lot Control	
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)	Active	N	N	>
STATE	7751872150	420 LB./DRUM (CONTAINS 111 LBS	7751872	(blank)	(blank)	Active	N	N	>

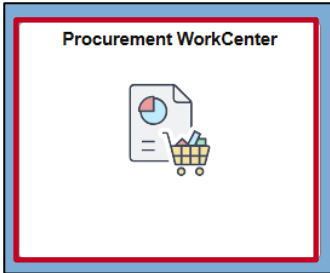
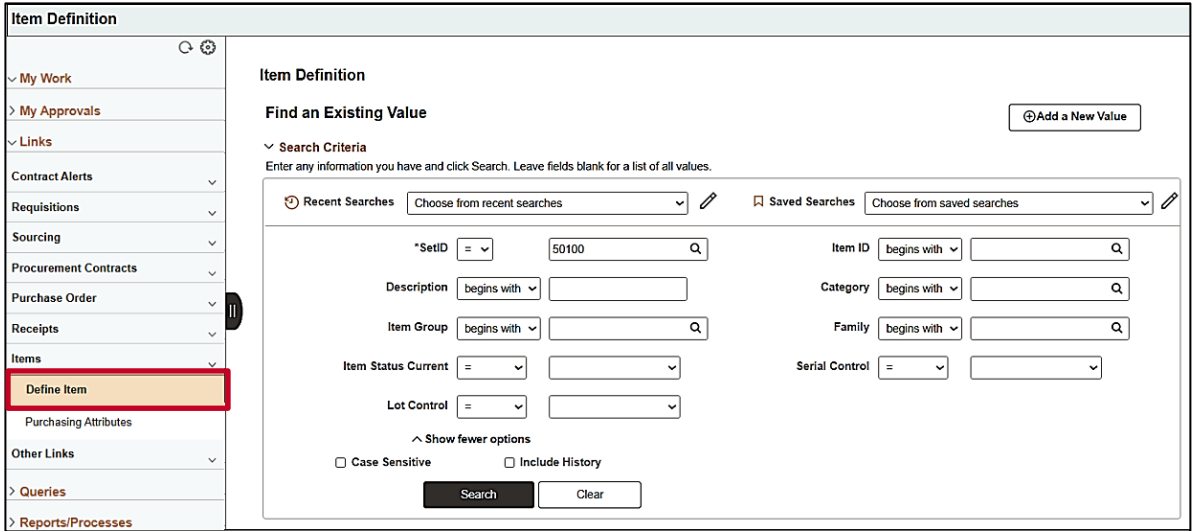
i

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 two Item IDs that begin with 7751872. For the Detail number assigned to the end of the NIGP number, users may use any number between the two numbers. In this example, the last three 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 the Item ID number in Cardinal.

Adding a New Item

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

The user will first need to determine the new item number using the NIGP Code Structure. Refer to the [Understanding Items](#) section at the beginning of this job aid for the NIGP Code Structure.

Step	Action
1.	Navigate to the Item Definition page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Items > Define Item Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Item Definition page using the following navigation path: NavBar > Menu > Items > Define Items and Attributes > Define Item

Step	Action
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The **Item Definition Find an Existing Value Search** page displays.

Item Definition

Find an Existing Value

⊕ Add a New Value

Search Criteria

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

Recent Searches

Choose from recent searches

Saved Searches

Choose from saved searches

*SetID

=

50100

Q

Item ID

begins with

Q

Description

begins with

Category

begins with

Q

Item Group

begins with

Q

Family

begins with

Q

Item Status Current

=

Serial Control

=

Lot Control

=

^ Show fewer options

☐ Case Sensitive

☐ Include History

Search

Clear

- Click the **Add a New Value** button.

⊕ Add a New Value

The **Item Definition Add a New Value** page displays.

Item Definition

Add a New Value

Q Find an Existing Value

*SetID

50100

Q

*Item ID

NEXT

Add

- Enter "STATE" in the **SetID** field.

*SetID STATE Q



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
5.	Enter the new NIGP/Item ID number in the Item ID field. If "NEXT" is the defaulted value, simply delete it and enter the new Item ID. *Item ID 7751872760
6.	Click the Add button. Add

The **Item Definition** page, **General** tab displays.

GeneralInventorySubstitutesConfigurationCustom1Audit

CommonClassificationsClassification 2DimensionsUsage

SetIDSTATEItem ID7751872760

*Description

Item Status

Current Status Date07/02/2026

*Current StatusUnder Initialization

Future Status Date

Future Status

Copy Item Status

Item Type

☒ Inventory Item☐ Non-Owned Item☐ Consigned Purchase

*Standard UOM

Default Category

Categories

*Physical NatureGoods

Item Group

Family

Demand Priority

Cost Profile Group

Promise Option

Item ImageManufacturersPurchasing Item AttributesUnits Of Measure

SaveNotify

AddUpdate/DisplayInclude History

General | Inventory | Substitutes | Configuration | Custom1 | Audit

7.	Verify that the correct 10-digit NIGP number was entered in the Item ID field. Item ID 7751872760
8.	Enter a description in the Description field. *Description SALT BRINE PER VDOT SPECS

Step	Action
9.	Enter the applicable Unit of Measure (UOM) in the Standard UOM field. *Standard UOM A76 Q Gal
10.	Enter the first seven digits of the NIGP number in the Default Category field. Default Category 7751872 Q Categories
11.	Click the Physical Nature dropdown button and select the appropriate option ("Goods" or "Services"). *Physical Nature Goods v
12.	If the Item is a WebIMS inventory item, select the Inventory Item checkbox option. Item Type ☒ Inventory Item ☐ Non-Owned Item ☐ Consigned Purchase
13.	If the Item is not a WebIMS inventory item, select the Non-Owned Item checkbox option. Item Type ☐ Inventory Item ☒ Non-Owned Item ☐ Consigned Purchase
14.	Click the Custom1 tab. General Inventory Substitutes Configuration Custom1 Audit



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	The Custom1 tab displays. GeneralInventorySubstitutesConfigurationCustom1Audit CharacterNumeric SetIDSTATEItem ID7751872760Standard Unit of MeasureA76 SALT BRINE PER VDOT SPECS Item Fld C30 A Item Fld C30 B Item Fld C30 C Item Fld C30 D WebIMS Item ID 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 SaveNotify AddUpdate/DisplayInclude History General Inventory Substitutes Configuration Custom1 Audit
15.	If the Item is a WebIMS inventory item, enter the WebIMS Item ID (i.e., stock number) in the WebIMS Item ID field. If it is not a WebIMS inventory item, leave this field blank. WebIMS Item ID 240004972
16.	Click the Save button. Save Notify
17.	Click the Purchasing Item Attributes link in the WorkCenter. Items Define Item Purchasing Attributes



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
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The **Purchase Items Attributes** page displays.

Purchasing AttributesPurchasing ControlsItem Supplier

SetIDSTATEItem ID7751872760Standard Unit of MeasureA76

DescriptionSALT BRINE PER VDOT SPECS

PO Available Date07/02/2026UnavailableUse as Substitute Item Only☐

Standard PriceA76

Last PO Price

*CurrencyUSD Dollar

Lead Time Days

*Item DescSALT BRINE PER VDOT SPECS SALT BRINE

Category7751872

Model

Asset Profile ID

Ultimate Use Code

Physical NatureGoods

Primary Buyer

*Long DescriptionSALT BRINE PER VDOT SPECS229 characters remaining

Associated PictureFile NameFile Extension

Chartfields1-1 of 1View All

*Account5012550Task

Item SpecificationsVAT DefaultPacking DetailsVAT Service Treatment Setup

SaveReturn to SearchNotifyUpdate/DisplayInclude History

Purchasing Attributes | Purchasing Controls | Item Supplier

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

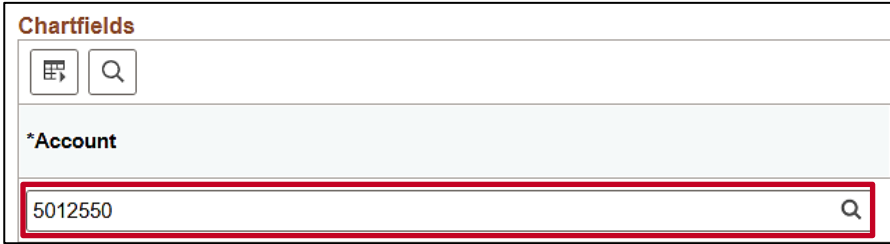
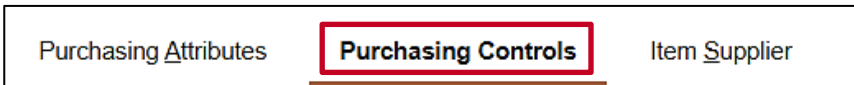
PO Available Date 07/02/2026

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

Unavailable 12/31/2999

20. In the **Standard Price** field, enter ".01" (one cent).

Standard Price 0.01000

Step	Action
21.	If the Description entered on the previous page was shortened, the full description may be entered in the Long Description field. 
22.	In the Chartfields section, if an Account value does not default, enter one in the Account field. 
23.	Click the Purchasing Controls tab. 
The Purchasing Controls tab displays with all sections collapsed. 	
24.	Click the Expand All link. 

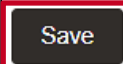
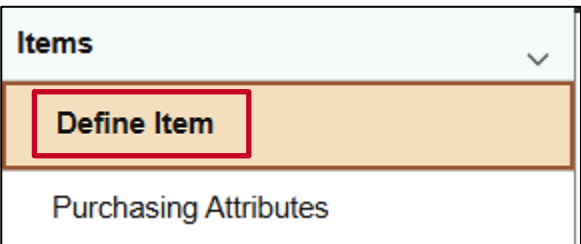


Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	All Purchasing Controls tab fields display. Some fields have default values and are grayed out. Purchasing AttributesPurchasing ControlsItem Supplier SetIDSTATEItem ID7751872760Standard Unit of MeasureA76 DescriptionSALT BRINE PER VDOT SPECS Expand AllCollapse All Matching Controls Unit Price ToleranceTolerance Over0.00000 % Unit Price Tolerance0.01 Ext Price Tolerance0.00000 % Ext Price Tolerance10.50 Receiving Controls *Receiving RequiredRequired Reject Qty Over Tolerance Qty Rcvd Tolerance %10.00 *Partial QtyRecvd/Warn Early Ship Reject Days2 Inspection Required Inspect Sample Percent0.00 *Inspection UOMStandard Inspect ID Sourcing Controls Use Category Sourcing Controls Lead Time Factor %0.00 Price Factor %0.00 *Sourcing MethodB QBasic Ship to Priority Factor %0.00 Supplier Priority Factor %0.00 Misc. Controls and Options Auto Select Accept Any Supplier Accept Any Ship To Available in All Regions Close PO Under Percent Tol Ship Via Contract Required RFQ Required Stockless Item Taxable Include in Planning Workflow Notification Controls Unit Price ToleranceTolerance Over99999999.00000 % Unit Price Tolerance999.00 Tolerance Under99999999.00000 999.00 BU Attributes SaveReturn to SearchNotify Update/DisplayInclude History
25.	Enter an appropriate value in the Unit Price Tolerance field. It defaults to "0.00". Unit Price Tolerance Tolerance Over 0.00000



Step	Action
26.	Enter an appropriate value in the Ext Price Tolerance field. It defaults to "0.00". Ext Price Tolerance 0.00000
27.	Click the Receiving Required dropdown button and select "Required". This field should always be set to "Required". *Receiving Required Required 
28.	Enter "10" in the Qty Rcvd Tolerance % field, for bulk commodities. For all other Items, set this value to "0". Qty Rcvd Tolerance % 10.00
29.	Click the Save button.   
30.	Click the Define Item link in the WorkCenter. 



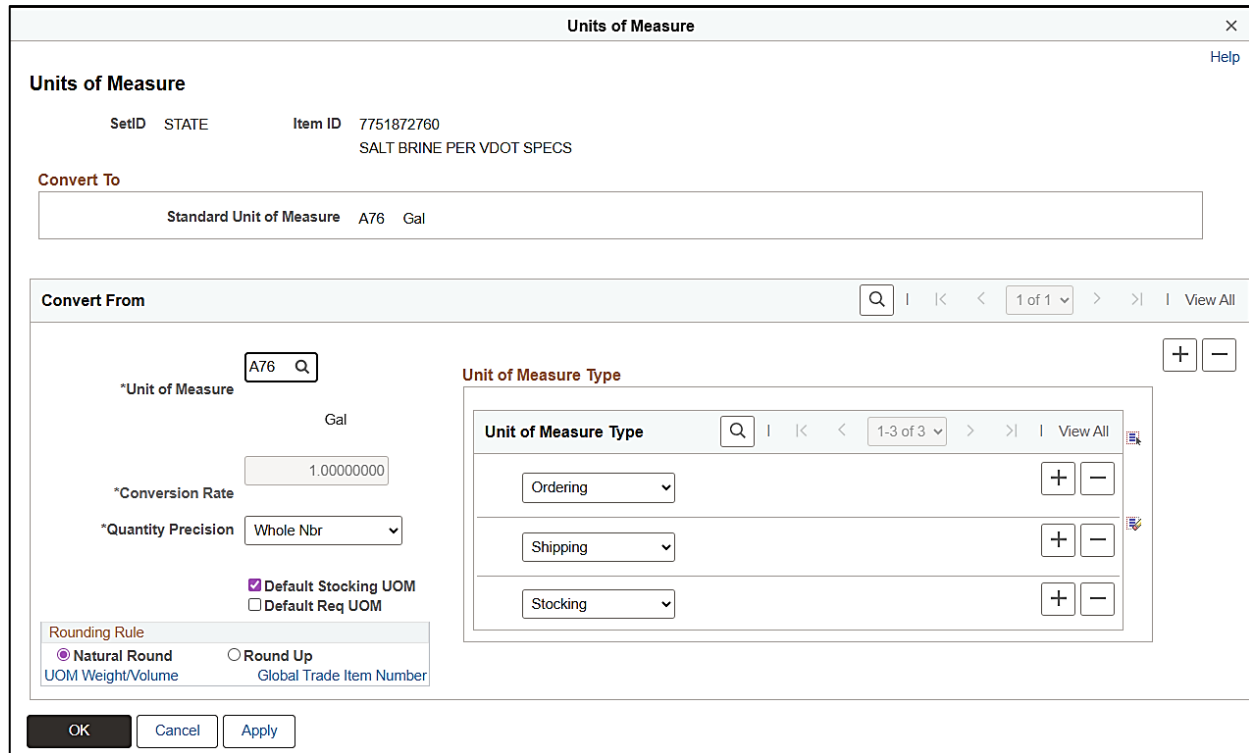
Procurement Job Aid

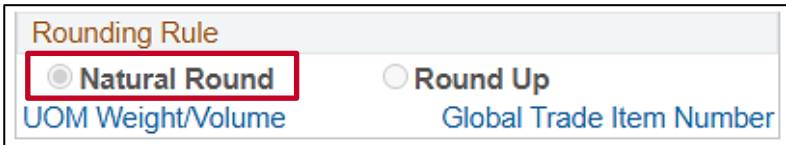
PR Adding Procurement Items (VDOT Only)

Step	Action
	The General tab displays. GeneralInventorySubstitutesConfigurationCustom1Audit CommonClassificationsClassification 2DimensionsUsage SetIDSTATEItem ID7751872760 *DescriptionSALT BRINE PER VDOT SPECS Item Status Current Status Date07/02/2026Future Status DateFuture StatusUnder InitializationCopy Item Status *Standard UOMA76Gal *Physical NatureGoods Item GroupFamilyDemand PriorityCost Profile GroupPromise Option Default Category7751872Categories Item ImageManufacturersPurchasing Item AttributesUnits Of Measure SaveReturn to SearchNotifyAddUpdate/DisplayInclude History General Inventory Substitutes Configuration Custom1 Audit
31.	If the item can be received and accepted in fractions, click the Units of Measure link. Units Of Measure

Step	Action
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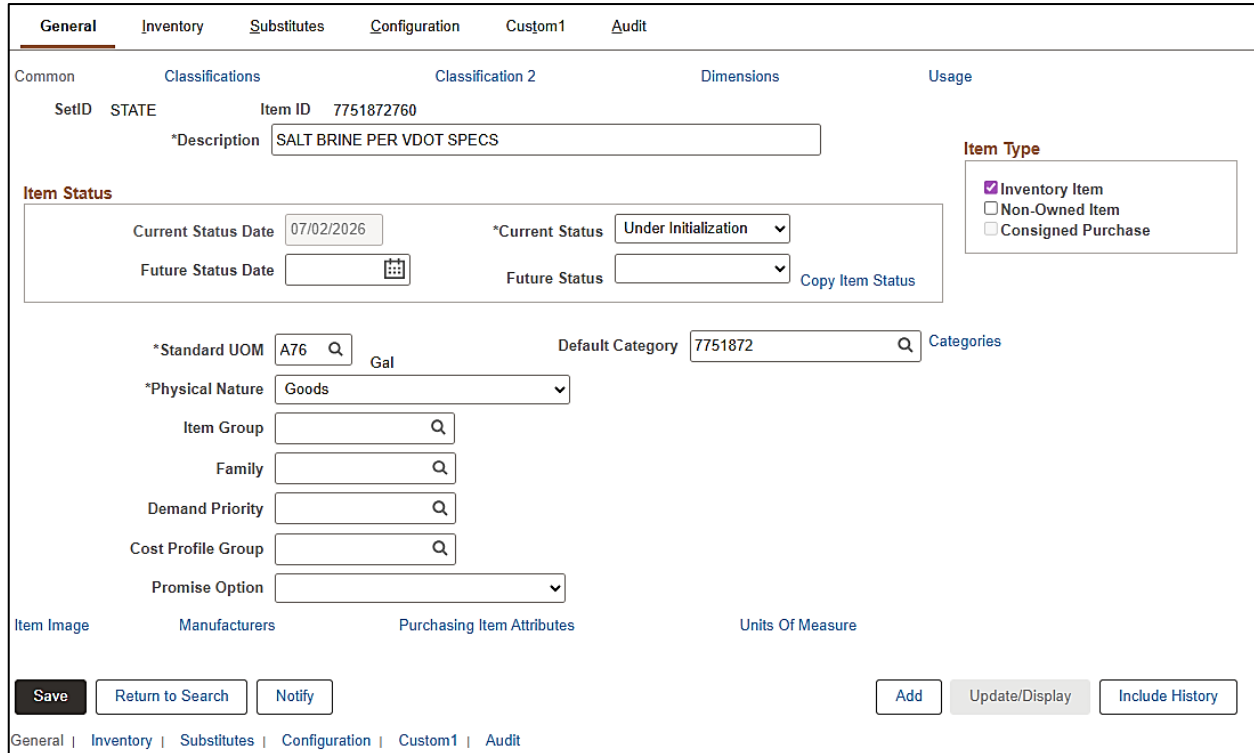
The **Units of Measure** page displays in a pop-up window.



32.	Click the Quantity Precision dropdown button and select "Decimal". 
33.	The Rounding Rule section should always be set to "Natural Round". 
34.	Click the Apply button. 
35.	Click the OK button. 

Step	Action
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The **General** tab displays.



General | Inventory | Substitutes | Configuration | Custom1 | Audit

Common | Classifications | Classification 2 | Dimensions | Usage

SetID STATE Item ID 7751872760

*Description SALT BRINE PER VDOT SPECS

Item Status

Current Status Date 07/02/2026 *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

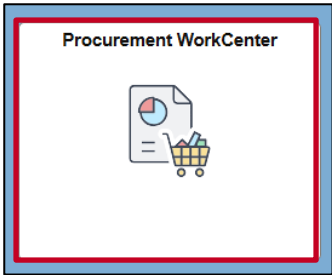
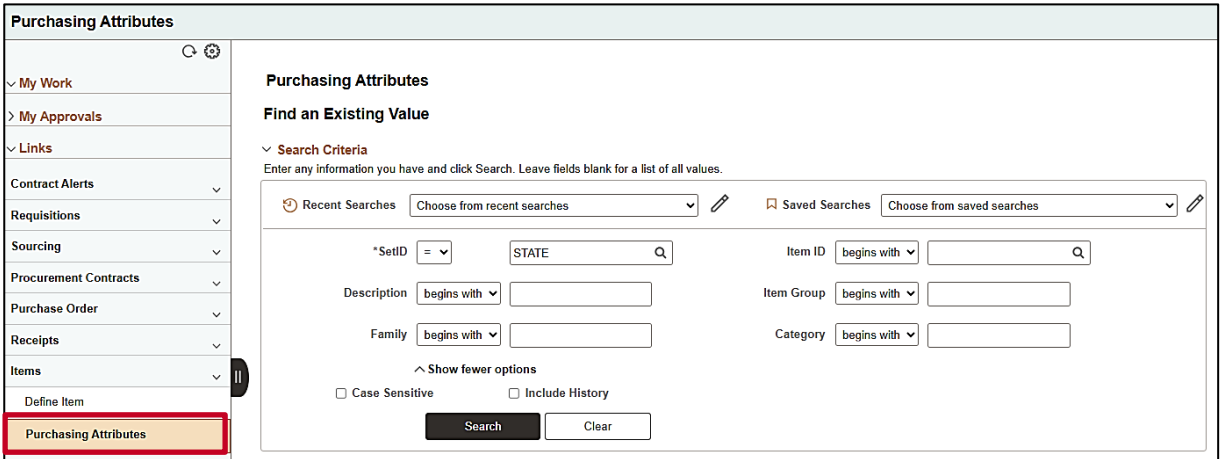
Save Return to Search Notify Add Update/Display Include History

General | Inventory | Substitutes | Configuration | Custom1 | Audit

36.	Click the Save button.
37.	Click the Current Status dropdown button and select "Pending Approval".
38.	Click the Save button.
	Upon Save the Current Status updates from "Pending Approval" to "Active". The new item is created and the process is complete.

Creating a New Item/Supplier Relationship

Once a new NIGP number/Item ID is created in Cardinal, the Item/Supplier relationship needs to be established in Cardinal. Create an Item/Supplier relationship for an Item by inserting a new row on the **Item Supplier** tab of the **Purchasing Attributes** page.

Step	Action
1.	Navigate to the Purchasing Attributes page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Items > Purchasing Attributes Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Purchasing Attributes page using the following navigation path: NavBar > Menu > Items > Define Items and Attributes > Purchasing Attributes

Step	Action
	The Purchasing Attributes Find an Existing Value Search page displays. Purchasing Attributes Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches *SetID = STATE Item ID begins with Description begins with Item Group begins with Family begins with Category begins with ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear
3.	Enter the applicable value in the SetID field. *SetID = STATE
4.	Enter the Item ID to add a new Supplier relationship to in the Item ID field. Item ID begins with 7503532050
5.	Click the Search button. Search Clear



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action				
	The Purchasing Attributes page displays. Purchasing Attributes SetID STATE Item ID 7503532050 Standard Unit of Measure LTN Description NO. 8, LIGHT WEIGHT, STONE PO Available Date 01/01/1900 Item Description NO. 8, LIGHT WEIGHT, STONE NO. 8, LIG Unavailable ☐ Use as Substitute Item Only Category 7503532 Standard Price 91.25000 LTN Model Asset Profile ID Last PO Price 91.25000 Ultimate Use Code Currency USD Dollar Physical Nature Goods Lead Time Days Primary Buyer Long Description STONE NO. 8, LIGHT WEIGHT, STONE 222 characters remaining Associated Picture File Name File Extension Chartfields < < 1-1 of 1 > > View All <table><thead><tr><th>Account</th><th>Task</th></tr></thead><tbody><tr><td>5012550</td><td></td></tr></tbody></table> Item Specifications VAT Default Packing Details VAT Service Treatment Setup Save Return to Search Notify Update/Display Include History Purchasing Attributes Purchasing Controls Item Supplier	Account	Task	5012550	
Account	Task				
5012550					
6.	Click the Item Supplier tab. Purchasing Attributes Purchasing Controls Item Supplier				



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action																
	The Item Supplier tab displays. Purchasing AttributesPurchasing ControlsItem Supplier SetID STATEItem ID 7503532050Standard Unit of Measure LTNDescription NO. 8, LIGHT WEIGHT, STONE Supplier Priorities <table border="1"><thead><tr><th>Supp SetID</th><th>Supplier ID</th><th>Supplier Name</th><th>*Priority Loc</th><th>Location Description</th><th>Status</th><th>*Priority</th><th>Alloc Pct</th></tr></thead><tbody><tr><td>STATE</td><td>0000006051</td><td></td><td>MAIN</td><td>Main Location</td><td>A</td><td>1</td><td>0</td></tr></tbody></table> Item Supplier *Supplier SetID STATESupplier Lookup *Supplier ID 0000006051Solite LLC Allocation % 0 Supplier's Catalog Supplier Item ID Item Extension Description254 characters remaining > Associated Picture Supplier Attributes *Price Loc MAIN *Price Date PO *Price Qty Line Quantity Origin Country Region of Origin Item Supplier UOMRTV (Supplier) Fees Accept Any UOM Accept Any Ship To Price Can Be Changed on Order Use Item Standard Lead Time Lead Time Days Supplier Item MFGItem Supplier Contracts Substitute Items Order Multiples Check Order Multiples Rounding Rule Natural Round Round Up Save Return to Search Notify Update/Display Include History	Supp SetID	Supplier ID	Supplier Name	*Priority Loc	Location Description	Status	*Priority	Alloc Pct	STATE	0000006051		MAIN	Main Location	A	1	0
Supp SetID	Supplier ID	Supplier Name	*Priority Loc	Location Description	Status	*Priority	Alloc Pct										
STATE	0000006051		MAIN	Main Location	A	1	0										
7.	Click the Add a New Row (+) icon in the Item Supplier list. Item Supplier *Supplier SetID STATESupplier Lookup *Supplier ID 0000006051Solite LLC *Status Active *Priority 1 + -																



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	A new Item Supplier form displays. Item Supplier *Supplier SetID STATE Q Supplier Lookup *Status Active + - *Supplier ID Q Allocation % 0 *Priority 24 Include in Planning ☒ Supplier's Catalog Supplier Item ID Item Extension Description 254 characters remaining > Associated Picture Supplier Attributes Q 1 of 1 View All
8.	Enter the applicable Supplier ID in the Supplier ID field and leave other default values. *Supplier ID 0000000082 Q
9.	Click the Save button. Save Return to Search Notify
10.	Click the Item Supplier UOM link in the Supplier Attributes section. Item Supplier UOM RTV (Supplier) Fees



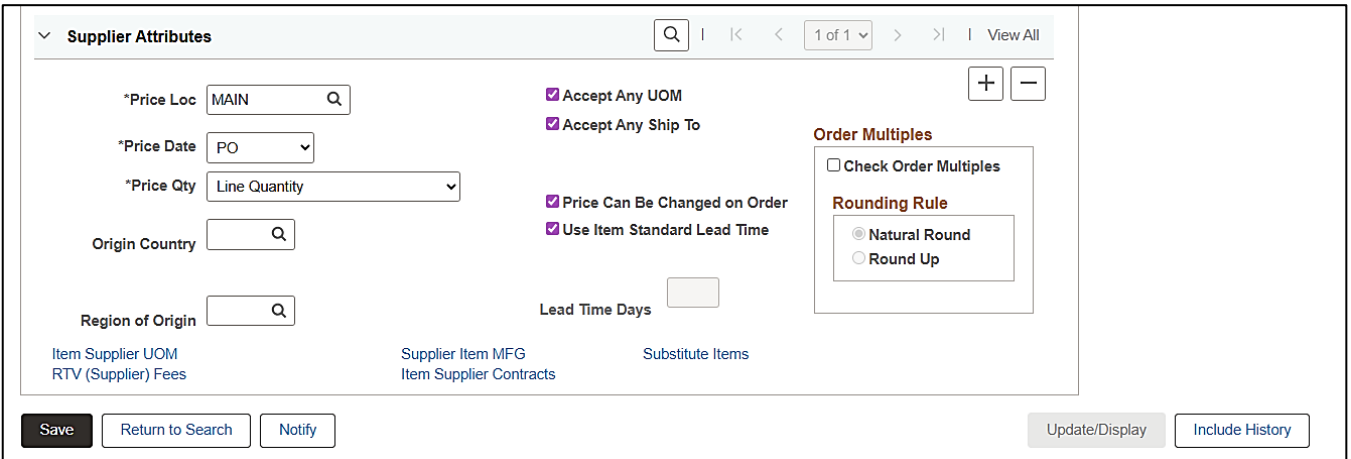
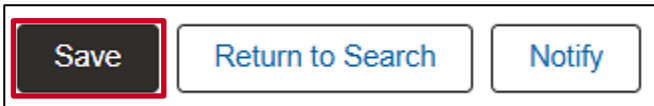
Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
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The **Supplier's UOM and Pricing Information** page displays in a pop-up window.

11.	In the Unit of Measure header section, update the Minimum Quantity field to reflect the minimum quantity that can be ordered for that item.
12.	To allow for an unlimited order quantity, set the Maximum Quantity field to "0.0000".
13.	If applicable, click the Qty Precision dropdown button and select "Decimal".
14.	In the UOM Price Attributes section, update the Effective Date field as appropriate.

Step	Action
15.	In the UOM Price Attributes section, update the Minimum Quantity field as appropriate. 
16.	Click the OK button. 
The Item Supplier tab displays. 	
17.	Click the Save button. 
	In the case of a Strategic Sourcing Event, the Item/Supplier relationship is automatically created when a bidder is selected and an award is posted. The item is now available to be added to any contract specific to this supplier. For more information on Strategic Sourcing Events, see the Job Aid titled PR345 Setting up, Analyzing, and Awarding Strategic Sourcing Events (VDOT Only) located on the Cardinal website in Job Aids under Learning.
	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. Purchase Orders may also be created from sourcing events or contracts. For more information on Purchase Orders, see the Job Aid titled PR344 Creating Purchase Orders (VDOT Only) located on the Cardinal website in Job Aids under Learning.

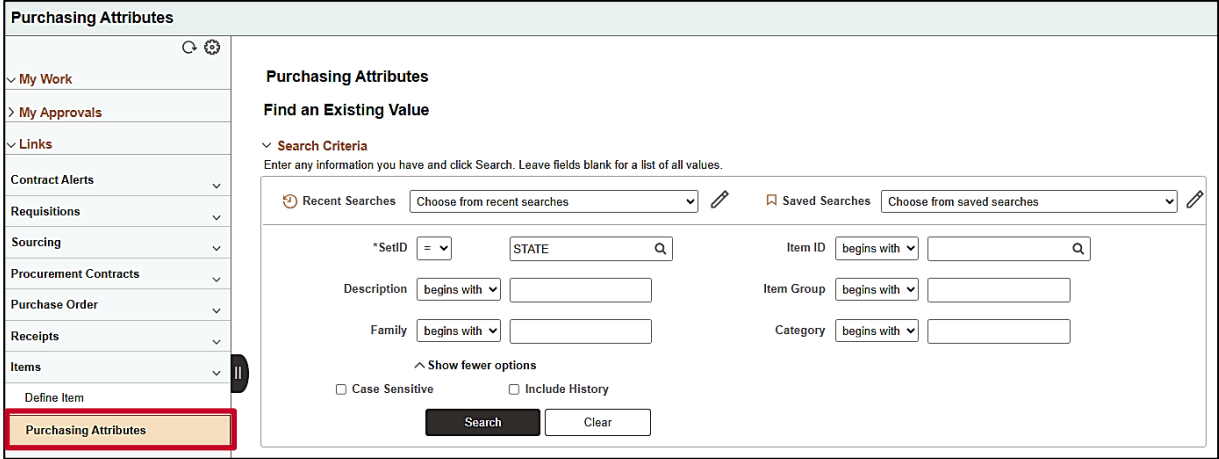
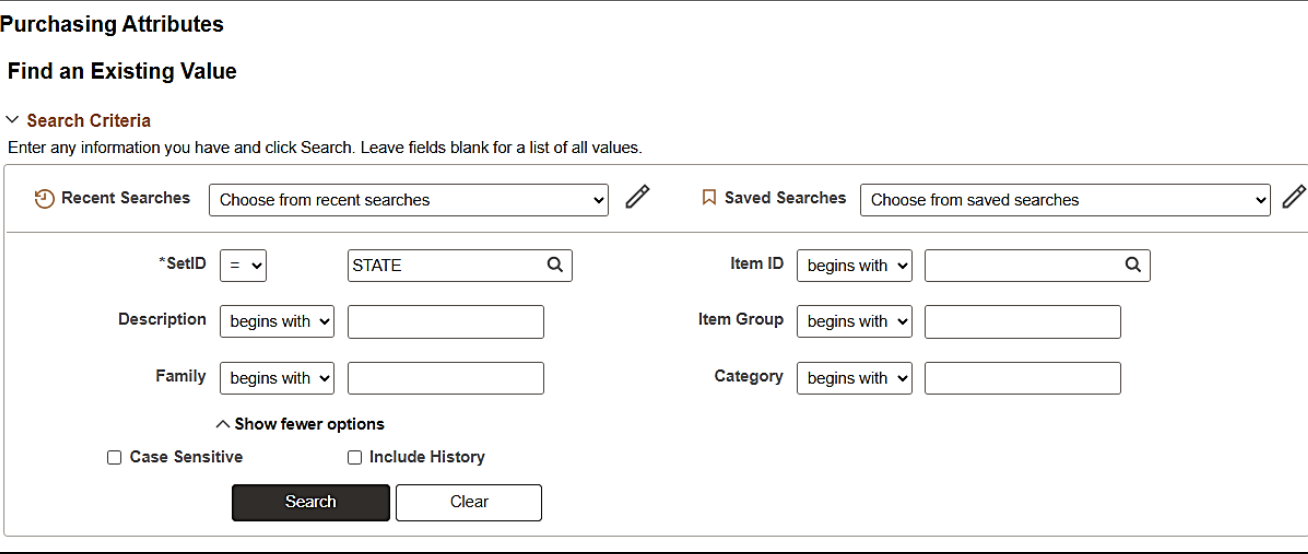
Step	Action
	When entering a Procurement Contract Line using the Item lookup, the Items listed are narrowed down to those related to the Supplier selected. If the Item searched for is not available in the list, create an Item/Supplier relationship following the steps in this section. For more information on Procurement Contracts, see the Job Aid titled PR348 Entering and Maintaining Procurement Contracts (VDOT Only), located on the Cardinal website in Job Aids under Learning.

Modifying the Item/Supplier Relationship on a Sourcing Event Purchase Order

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

As the **Maximum Quantity** and **Supplier Price** default in from the sourcing event or contract, the user may need to update the **Purchasing Attributes** on the **Item/Supplier Relationship** page in order to proceed.

Step	Action
1.	Navigate to the Purchasing Attributes page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.

Step	Action
2.	Use the following navigation in the WorkCenter: Links > Items > Purchasing Attributes Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Purchasing Attributes page using the following navigation path: NavBar > Menu > Items > Define Items and Attributes > Purchasing Attributes
The Purchasing Attributes Find an Existing Value Search page displays. 	
3.	Enter the applicable value in the SetID field. 



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
4.	Enter the applicable Item ID in the Item ID field. Item ID begins with ▼ 7503532050 Q
5.	Click the Search button. Search Clear
The Purchasing Attributes page displays. Purchasing AttributesPurchasing ControlsItem Supplier SetIDSTATEItem ID7503532050Standard Unit of MeasureLTN DescriptionNO. 8, LIGHT WEIGHT, STONE PO Available Date01/01/1900 Unavailable ☐ Use as Substitute Item Only Standard Price91.25000LTN Last PO Price91.25000 *CurrencyUSD Lead Time Days *Long Description STONE NO. 8, LIGHT WEIGHT, STONE 222 characters remaining *Item DescriptionNO. 8, LIGHT WEIGHT, STONENO. 8, LIG Category7503532 Model Asset Profile ID Ultimate Use Code Physical NatureGoods Primary Buyer Associated Picture File Name File Extension	
6.	Click the Item Supplier tab. Purchasing AttributesPurchasing ControlsItem Supplier



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
	The Item Supplier tab displays. Purchasing AttributesPurchasing ControlsItem Supplier SetIDSTATEItem ID7503532050Standard Unit of MeasureLTN DescriptionNO. 8, LIGHT WEIGHT, STONE > Supplier Priorities Item Supplier *Supplier SetIDSTATESupplier Lookup *Supplier ID0000006051Solite LLC Allocation %0 Supplier's Catalog Supplier Item ID Item Extension Description 254 characters remaining *StatusActive *Priority1 ☒ Include in Planning > Associated Picture Supplier Attributes
7.	Find the applicable supplier using the Item Supplier navigation controls. > Supplier Priorities Item Supplier Q < > 1 of 21 > > View All *Supplier SetIDSTATESupplier Lookup *StatusActive + -
8.	In the Supplier Attributes section, click the Item Supplier UOM link. Item Supplier UOM RTV (Supplier) Fees Supplier Item MFG Item Supplier Contracts Substitute Items



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
------	--------

The **Item Supplier UOM** page displays in a pop-up window.

Supplier's UOM and Pricing Information

Help

SetID STATE Item ID 7503532050 NO. 8, LIGHT WEIGHT, STONE
Supplier 0000000082 J D Hauling Inc Location MAIN

Unit Of Measure

Q I < 1 of 1 > > | View All

*UOM LTN Q Ton (UK) Or Longton (US) ☒ Default

Packing Details + -
Effective Dated UOM
Update PO

Minimum Quantity 0.0010
Maximum Quantity 0.0000 Order Quantity Multiple

Conversion to Item Base UOM

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

UOM Price Attributes

Q I < 1 of 1 > > | View All

*Effective Date 06/30/2026 *Currency Code USD
*Status Active Supplier Price 91.25000
*Minimum Quantity 0.0010 Standard Price Update Status No Update
Qty Rcvd Tolerance % 10.00 BU Price Update Status No Update

> Matching Controls

OK Cancel

9. Update the **Maximum Quantity**, **Supplier Price**, and **Qty Precision** fields, as needed.

Unit Of Measure

Q I < 1 of 1 > > | View All

*UOM LTN Q Ton (UK) Or Longton (US) ☒ Default

Packing Details + -
Effective Dated UOM
Update PO

Minimum Quantity 0.0010
Maximum Quantity 0.0000 Order Quantity Multiple

Conversion to Item Base UOM

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

UOM Price Attributes

Q I < 1 of 1 > > | View All

*Effective Date 06/30/2026 *Currency Code USD
*Status Active Supplier Price 91.25000
*Minimum Quantity 0.0010 Standard Price Update Status No Update
Qty Rcvd Tolerance % 10.00 BU Price Update Status No Update

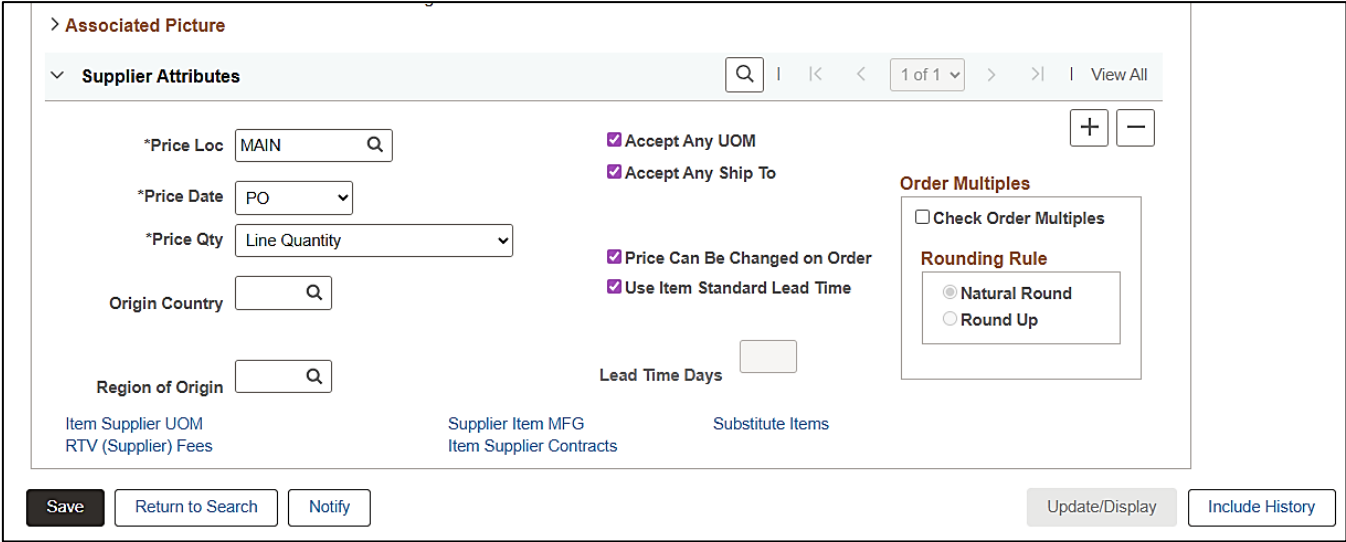
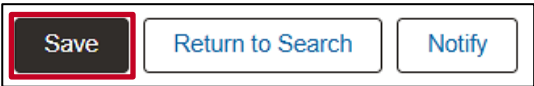
Rev 9/1/2026

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Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
10.	Click the OK button. 
The Item Supplier tab redisplay. 	
11.	Click the Save button. 



Adding an Item Unit of Measure (UOM)

Contact the VITA helpdesk (vccc@vita.virginia.gov) to request a new UOM type. Be sure to include “Cardinal” in the subject line of the request. Once the helpdesk request is complete, add the new UOM to an Item/Supplier relationship.

Example: Item 9105435001, Painting Services, has a UOM of EA (each). A specific contract service requires a UOM of FTK (square foot). A new UOM must be added through a helpdesk request. Once the new UOM is added, it can be set up on the Item/Supplier relationship.

Step	Action
1.	Using the Item ID, find the item and follow Steps 1-8 in the Modifying the Item/Supplier Relationship on a Sourcing Event Purchase Order section in this job aid.

The **Supplier’s UOM and Pricing Information** page displays.

Supplier's UOM and Pricing Information

SetID STATE
Supplier 0000015236 Taylor Enterprises LLC

Item ID 9105435001
Location MAIN

PAINTING SERVICES

Help

Unit Of Measure

*UOM EA Each

Minimum Quantity 0.0001

Maximum Quantity 0.0000

Order Quantity Multiple

Conversion to Item Base UOM

*Rate Type Standard

*Qty Precision Decimal

Std UOM Rate

Get Std Rate

Packing Details

Effective Dated UOM

Update PO

Default

Rounding Rule

Natural Round

Round Up

UOM Price Attributes

*Effective Date 01/01/1901

*Status Active

*Minimum Quantity 0.0001

Qty Rcvd Tolerance % 0.00

*Currency Code USD

Supplier Price 8500.00000

Standard Price Update Status No Update

BU Price Update Status No Update

Matching Controls

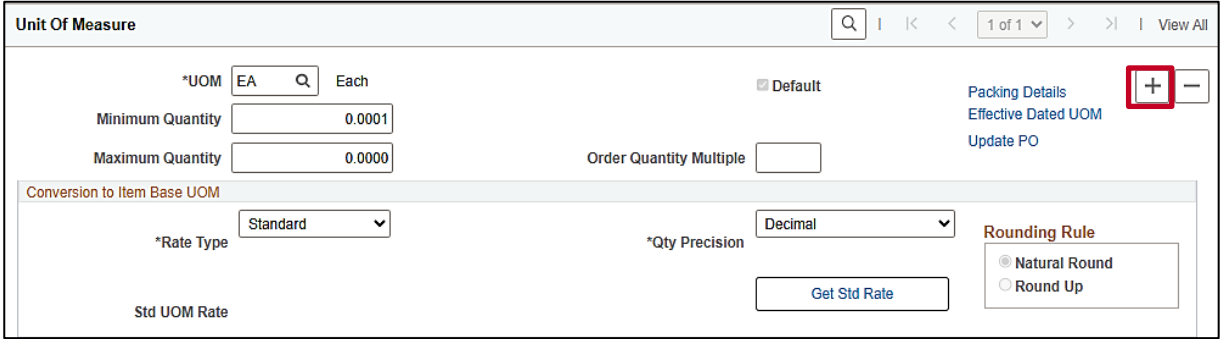
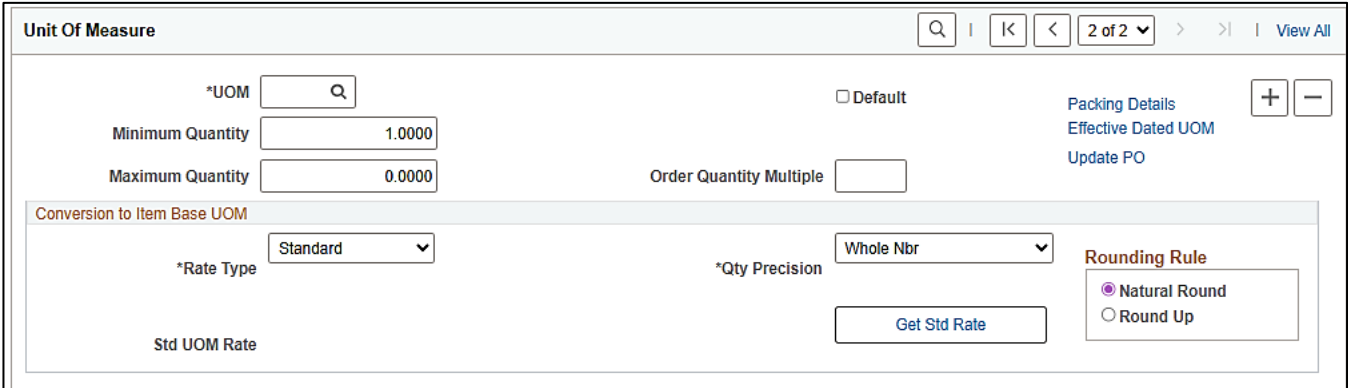
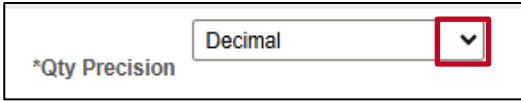
OK

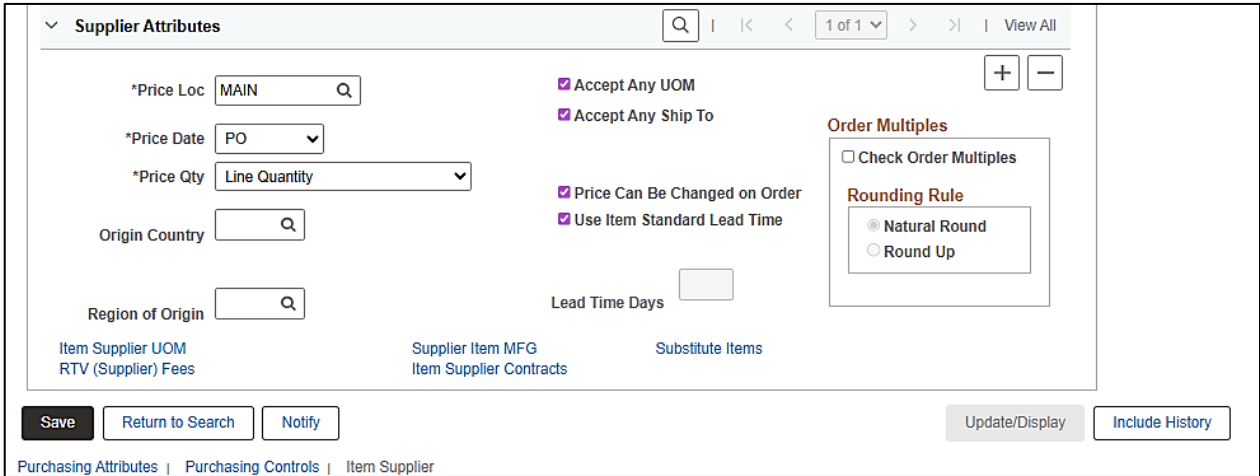
Cancel



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

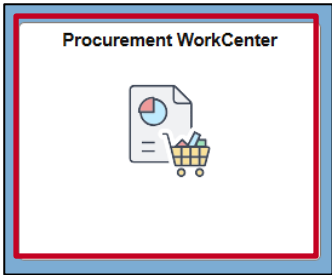
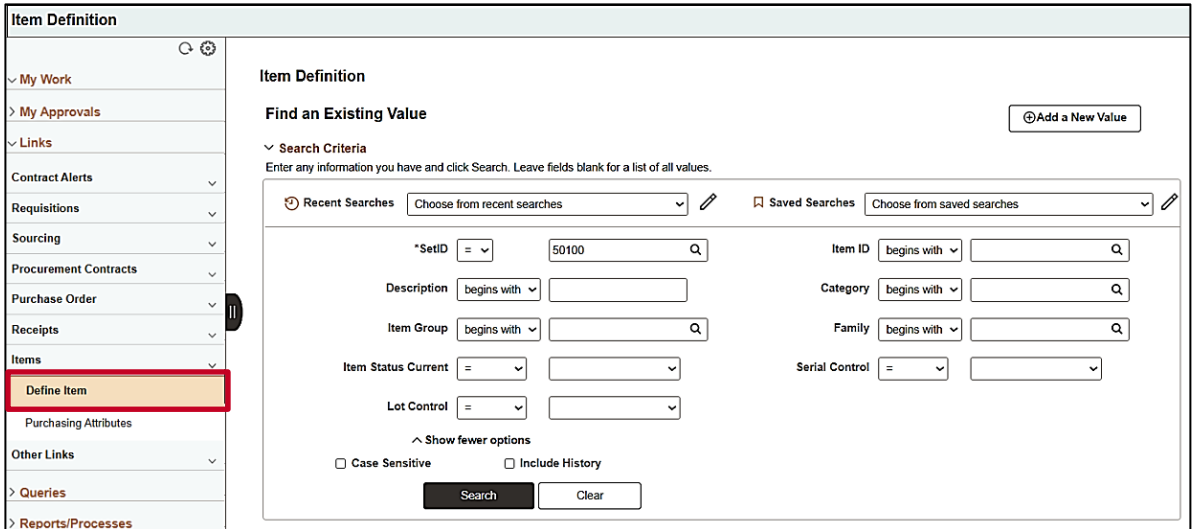
Step	Action
2.	Click the Add a New Row icon (+) in the Unit of Measure section to add a new UOM to the relationship. 
A new blank UOM record displays. 	
3.	Click the UOM Look up icon and select the new UOM. 
4.	Click the Qty Precision dropdown button and select "Decimal". 
5.	Enter "USD" in the Currency Code field. 

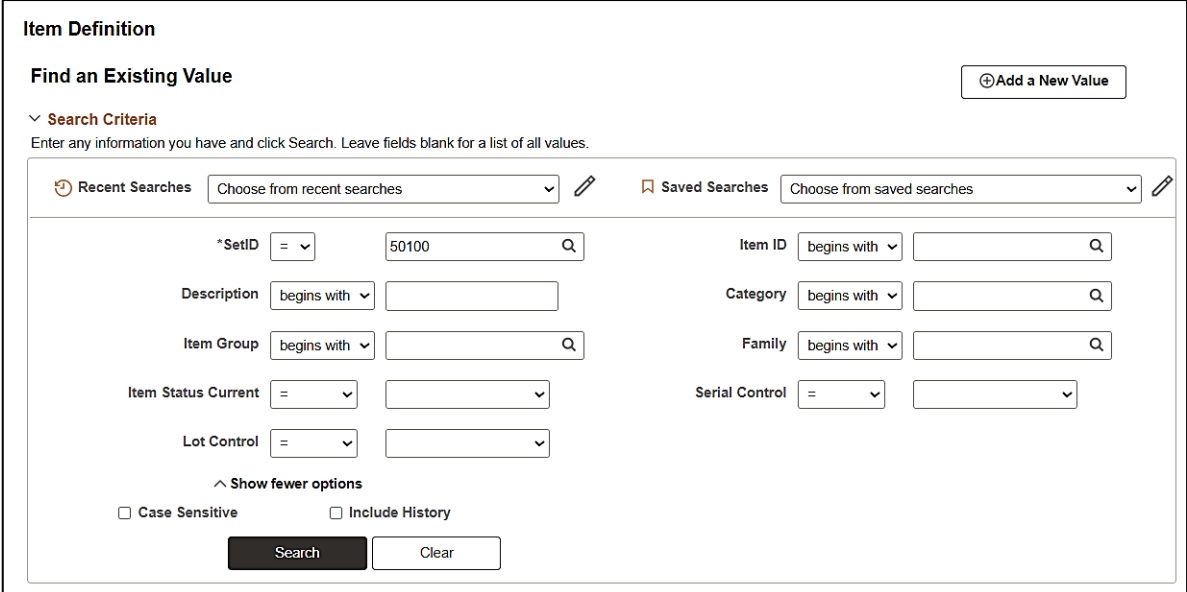
Step	Action
6.	Enter a value in the Supplier Price field. Any value may be entered and this information will default on the PO. 
7.	Click the OK button. 
The Item Supplier tab redisplay. 	
8.	Click the Save button. 
	The Item is now set up with the additional UOM and is available for selection when using this supplier.

Step	Action																																																										
	To use this new UOM on a Procurement Contract, first create and save the Contract. Then on the Contract Entry page set the Status field to “Open”, and in the Line section, click the Contract Details icon next to the Item. (Note that in this example, the default UOM is “EA”.) <table><tr><th>Line</th><th></th><th>Item</th><th>Description</th><th></th><th>UOM</th></tr><tr><td>1</td><td></td><td>9105435001 </td><td>PAINTING SERVICES PAINTING </td><td></td><td>EA</td></tr></table> In the Details for Line XX page in the pop-up window, expand the Pricing Information section, and in the UOM/Pricing section, look up the new UOM in the UOM field. In this example, “FTK”. <table><tr><th colspan="10">UOM/Pricing</th></tr><tr><td></td><td></td><td colspan="4"></td><td></td><td></td><td>1-1 of 1</td><td></td><td></td><td>View All</td></tr><tr><th></th><th>Price Loc</th><th>UOM</th><th>UPN Type</th><th>UPN ID</th><th>Base Price</th><th>Curr</th><th></th><th></th><th></th><th></th><th></th></tr><tr><td>☒</td><td>MAIN </td><td>FTK </td><td></td><td></td><td>0.00000</td><td>USD </td><td></td><td></td><td></td><td></td><td></td></tr></table>	Line		Item	Description		UOM	1		9105435001 	PAINTING SERVICES PAINTING 		EA	UOM/Pricing																		1-1 of 1			View All		Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr						☒	MAIN 	FTK 			0.00000	USD 					
Line		Item	Description		UOM																																																						
1		9105435001 	PAINTING SERVICES PAINTING 		EA																																																						
UOM/Pricing																																																											
								1-1 of 1			View All																																																
	Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr																																																					
☒	MAIN 	FTK 			0.00000	USD 																																																					
	To use this new UOM on a Purchase Order, on the Maintain Purchase Order Purchase Order page, click the UOM Look Up icon on the applicable line, and update it from the default UOM (“EA” in this example) to the new UOM (“FTK” in this example). <table><tr><th colspan="10">Lines </th></tr><tr><td></td><td></td><td colspan="8"></td></tr><tr><th colspan="10">Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving </th></tr><tr><th>Line</th><th></th><th>Item</th><th>Description</th><th></th><th>PO Qty</th><th>*UOM</th></tr><tr><td>1</td><td></td><td>9105435001 </td><td>PAINTING SERVICES </td><td></td><td></td><td>FTK </td></tr></table>	Lines 																				Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving 										Line		Item	Description		PO Qty	*UOM	1		9105435001 	PAINTING SERVICES 			FTK 														
Lines 																																																											
																																																											
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Line		Item	Description		PO Qty	*UOM																																																					
1		9105435001 	PAINTING SERVICES 			FTK 																																																					

Inactivating an Item

Once an NIGP number/Item ID is entered into Cardinal, it cannot be deleted. However, an Item ID can be inactivated. Before inactivating an Item, ensure that it has no open Requisitions, Contracts, or Purchase Orders associated with it.

Step	Action
1.	Navigate to the Item Definition page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in the WorkCenter: Links > Items > Define Item Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Item Definition page using the following navigation path: NavBar > Menu > Items > Define Items and Attributes > Define Item

Step	Action
	The Item Definition Find an Existing Value Search page displays. 
3.	Enter "STATE" in the SetID field. 
4.	Enter the applicable Item ID in the Item ID field. 
5.	Click the Search button. 



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
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The **General** tab on the **Item Definition** page displays.

General Inventory Substitutes Configuration Custom1 Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 7751872760

*Description SALT BRINE PER VDOT SPECS

Item Status

Current Status Date 07/02/2026 *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

6. Click the **Custom1** tab.

General Inventory Substitutes **Custom1** Audit

The **Custom1** tab displays.

General Inventory Substitutes Configuration **Custom1** Audit

Character Numeric

SetID STATE Item ID 7751872760 Standard Unit of Measure A76

SALT BRINE PER VDOT SPECS

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

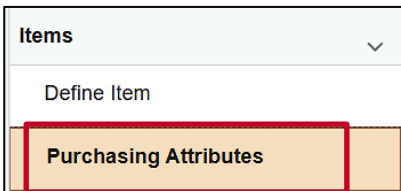
Item Fld C8

Save Return to Search Notify Add Update/Display Include History



Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
7.	Delete the value from the WebIMS Item ID field. 
8.	Click the Save button. 
9.	If the item should be removed from both inventory and non-inventory, click the Purchasing Item Attributes link in the WorkCenter. 

The **Purchasing Item Attributes** page displays.

Purchasing AttributesPurchasing ControlsItem Supplier

SetIDSTATEItem ID7751872760Standard Unit of MeasureA76

DescriptionSALT BRINE PER VDOT SPECS

PO Available Date07/02/2026*Item DescrSALT BRINE PER VDOT SPECS SALT BRINE

UnavailableUse as Substitute Item OnlyCategory7751872

Standard Price0.01000A76Model

Last PO Price0.01000Asset Profile ID

*CurrencyUSDUltimate Use Code

Lead Time DaysPhysical NatureGoods

Primary Buyer

*Long DescriptionSALT BRINE PER VDOT SPECS 229 characters remaining

Associated PictureFile NameFile Extension

Chartfields1-1 of 1View All

*Account5012550Task

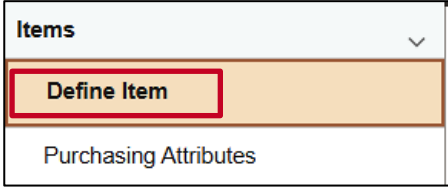
Item SpecificationsVAT DefaultPacking DetailsVAT Service Treatment Setup

SaveReturn to SearchNotifyUpdate/DisplayInclude History

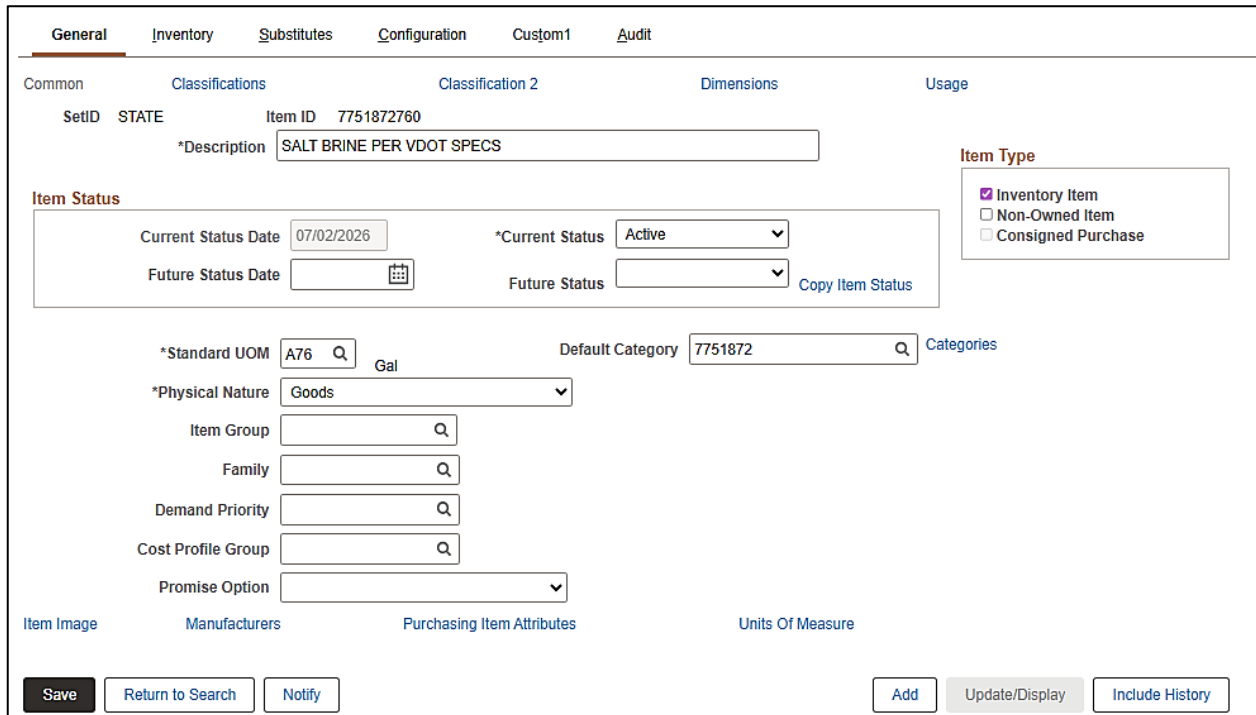


Procurement Job Aid

PR Adding Procurement Items (VDOT Only)

Step	Action
10.	Change the Unavailable field date value to today's date. 
11.	Click the Save button. 
12.	Click the Define Item link in the WorkCenter. 

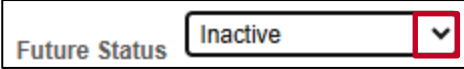
The **Item Definition** page, **General** tab displays.



The screenshot shows the 'General' tab of the 'Item Definition' page. The page is divided into several sections: 'Common' (SetID, STATE, Item ID, *Description), 'Item Status' (Current Status Date, Future Status Date, *Current Status, Future Status), 'Item Type' (Inventory Item, Non-Owned Item, Consigned Purchase), 'Physical Nature' (*Standard UOM, Default Category, *Physical Nature, Item Group, Family, Demand Priority, Cost Profile Group, Promise Option), and 'Units Of Measure' (Item Image, Manufacturers, Purchasing Item Attributes, Units Of Measure). The 'Future Status Date' field is highlighted with a red box, showing the date 07/03/2026.

13.	Change the Future Status Date field to tomorrow's date. 
-----	---



Step	Action
14.	Click the Future Status dropdown button and select "Inactive". 
15.	Click the Save button.  The entries are saved and the Item is unavailable effective immediately.
16.	Send an email to the Cardinal Procurement help desk at COASDProcurementHelpdesk@VDOT.Virginia.gov to have them complete the inactivation process.