



Reconciling a WebIMS Purchase Order Overview

In accordance with statewide procurement standards, Cardinal Purchase Orders (POs) are sent to eVA for both supplier record and agency reporting. VDOT business rules require that all POs be transmitted to eVA once they are dispatched (every four hours), except those POs for aggregates, road salt, and asphalt. Those aggregate type POs will transmit to eVA only when the PO is fully received.

Therefore, if the WebIMS PO is an aggregate type, ensure that it is fully received in order to reconcile.

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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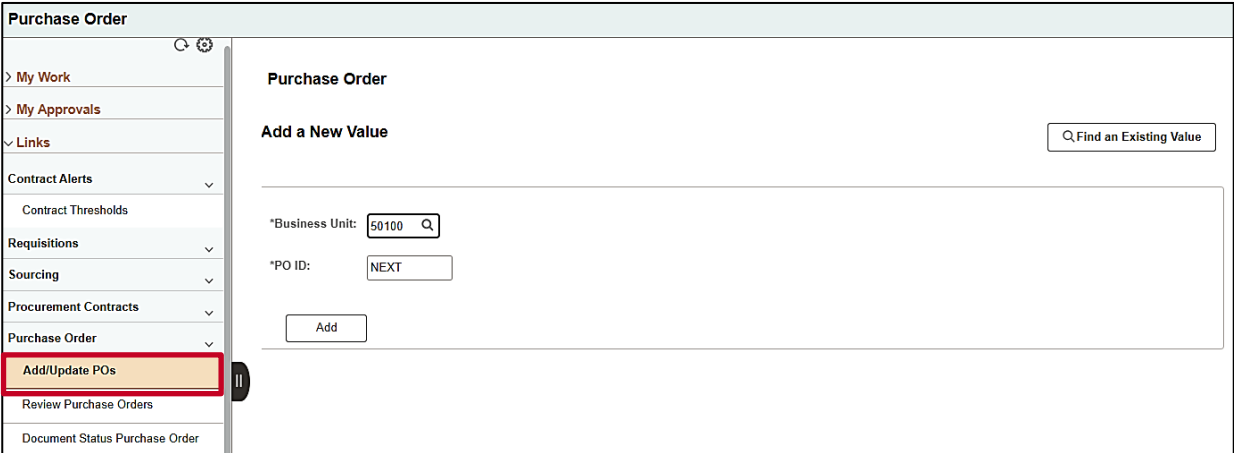


PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Revision History

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

Reconciling a WebIMS Purchase Order

Step	Action
1.	Navigate to the Add/Update POs 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 > Purchase Order > Add/Update POs Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Add/Update POs page using the following navigation path: NavBar > Menu > Purchasing > Purchase Orders > Add/Update POs



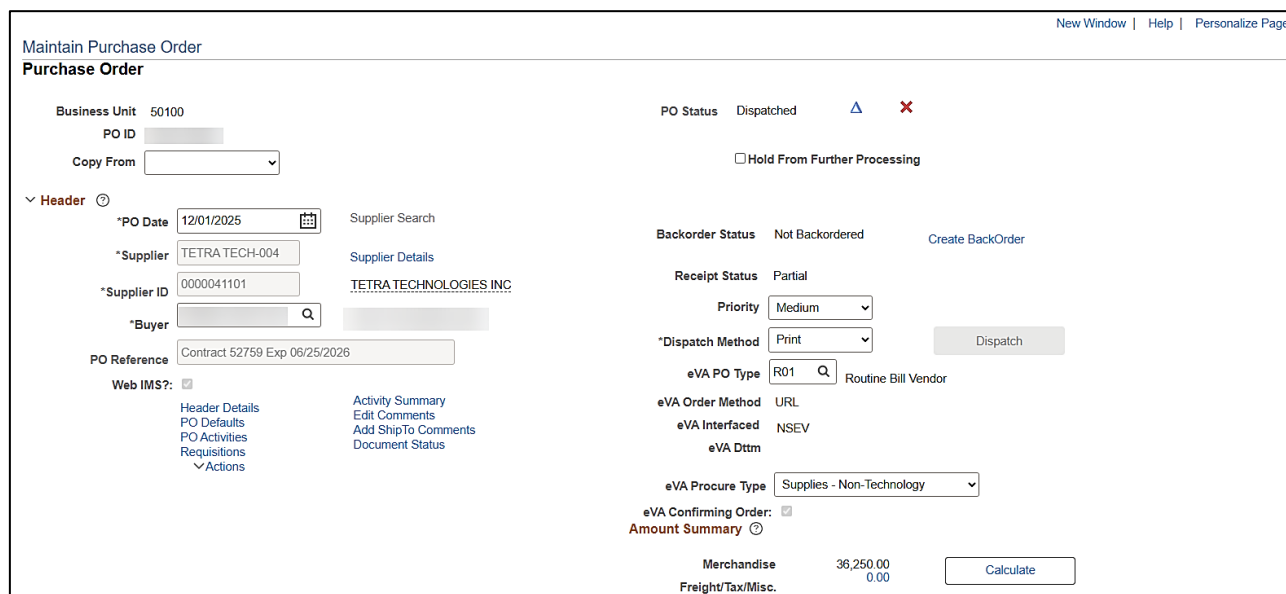
PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action
	The Purchase Order Add a New Value page displays. Purchase Order Add a New Value Find an Existing Value *Business Unit: 50100 *PO ID: NEXT Add
3.	Click the Find an Existing Value button. Find an Existing Value
	The Purchase Order Find an Existing Value Search page displays. Purchase Order 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 ✎ *Business Unit = 50100 Q PO ID begins with Purchase Order Date = 📅 PO Status = ▼ Short Supplier Name begins with Q Supplier ID begins with Q Supplier Name begins with Q Buyer begins with Q Buyer Name begins with Q PO Type = ▼ Purchase Order Reference begins with Hold From Further Processing ☐ ^ Show fewer options ☐ Case Sensitive Search Clear

PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action
4.	Enter "50100" in the Business Unit field. 
5.	Enter the Purchase Order ID to be reconciled in the PO ID field. 
6.	Click the Search button. 

The **Maintain Purchase Order** page displays.



Maintain Purchase Order

Purchase Order

Business Unit 50100

PO ID

Copy From

Header

*PO Date 12/01/2025

*Supplier TETRA TECH-004

*Supplier ID 0000041101

*Buyer

PO Reference Contract 52759 Exp 06/25/2026

Web IMS?: ☒

Header Details

PO Defaults

PO Activities

Requisitions

Actions

Activity Summary

Edit Comments

Add ShipTo Comments

Document Status

Supplier Search

Supplier Details

TETRA TECHNOLOGIES INC

PO Status Dispatched

Hold From Further Processing

Backorder Status Not Backordered

Create BackOrder

Receipt Status Partial

Priority Medium

*Dispatch Method Print

Dispatch

eVA PO Type R01

Routine Bill Vendor

eVA Order Method URL

eVA Interfaced NSEV

eVA Dttm

eVA Procure Type Supplies - Non-Technology

eVA Confirming Order: ☒

Amount Summary

Merchandise 36,250.00

Freight/Tax/Misc. 0.00

Calculate



If the **Receipt Status** field displays as "Received", the reconciliation task is complete, and no additional action is required. Once the reconciliation is complete, the **PO Status** will automatically be updated to "Complete" (approximately 60 days).



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Step

Action

7.

Click the **Activity Summary** link.

Web IMS?: ☒

Header Details

PO Defaults

PO Activities

Requisitions

▼ Actions

Activity Summary

Edit Comments

Add ShipTo Comments

Document Status

The **Activity Summary** page displays in a new browser tab.

Activity Summary

Business Unit50100

Purchase Order

Merchandise Amount36,250.00 USD

Merchandise Receipt11,629.34 USD

Merchandise Returned0.00 USD

Merchandise Invoice11,629.34 USD

Merchandise Matched11,629.34 USD

PO StatusDispatched

SupplierTETRA TECHNOLOGIES INC

Supplier LocationMAIN

Lines

Details

Receipt

Invoice

Matched

RTV

▶▶

Line	Line Details	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	UPN T
1		7754528070	CALCIUM CHLORIDE, LIQUID CHLOR	GLL			

Return to Search

Notify

8.

Click the **Receipt** tab in the **Lines** section.

Lines

Details

Receipt

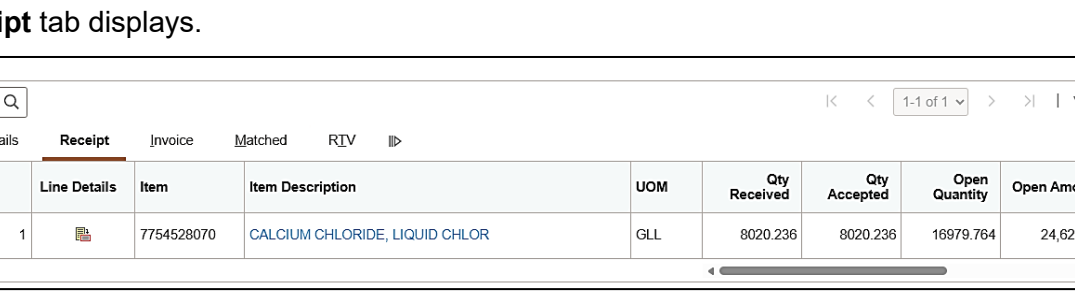
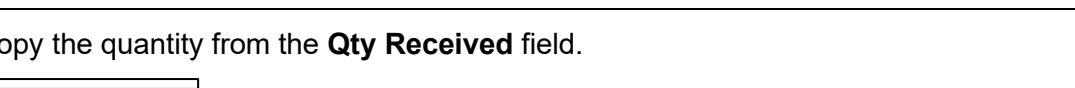
Invoice

Matched

RTV

▶▶

PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action
	The Receipt tab displays. 
9.	Copy the quantity from the Qty Received field. 
10.	Click the Add/Update POs tab at the top of the browser window. 



PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step

Action

The **Maintain Purchase Order** page displays.

Maintain Purchase Order

Purchase Order

Business Unit 50100

PO ID

Copy From

*PO Date 12/01/2025

*Supplier TETRA TECH-004

*Supplier ID 0000041101

*Buyer

Supplier Search

Supplier Details

TETRA TECHNOLOGIES INC

PO Reference Contract 52759 Exp 09/25/2026

Web IMS?

Header Details

PO Defaults

PO Activities

Requisitions

Actions

Activity Summary

Edit Comments

Add Ship To Comments

Document Status

PO Status Dispatched

Hold From Further Processing

Backorder Status Not Backordered

Create BackOrder

Receipt Status Partial

Priority Medium

*Dispatch Method Print

Dispatch

eVA PO Type R01

Routine Bill Vendor

eVA Order Method URL

eVA Interfaced NSEV

eVA Dtm

eVA Procure Type Supplies - Non-Technology

eVA Confirming Order

Amount Summary

Merchandise 36,250.00

Freight/Tax/Misc. 0.00

Total Amount 36,250.00 USD

Calculate

Add Items From

Catalog

Item Search

Select Lines To Display

Search for Lines

Line

To

Retrieve

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

PO Qty

*UOM

Category

Price

Merchandise Amount

Status

1

7754528070

CALCIUM CHLORIDE, LIQUID CHLORIDE, CALCIUM, LIQUID, 32% SOLUTION F/SNOW

25000

GLL

7754528

1.45000

36,250.00

Approved

View Approvals

Close Short All Lines

*Go to

More

Save

Return to Search

Notify

Refresh

Add

Update/Display

11.

Paste the amount copied from the **Qty Received** field into the **PO Qty** field for the applicable line in the **Lines** section.

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

PO Qty

*UOM

Category

Price

Merchandise Amount

1

7754528070

CALCIUM CHLORIDE, LIQUID CHLORIDE, CALCIUM, LIQUID, 32% SOLUTION F/SNOW

25000

GLL

7754528

1.45000

36,250.00

12.

Click the **Calculate** button.

Calculate



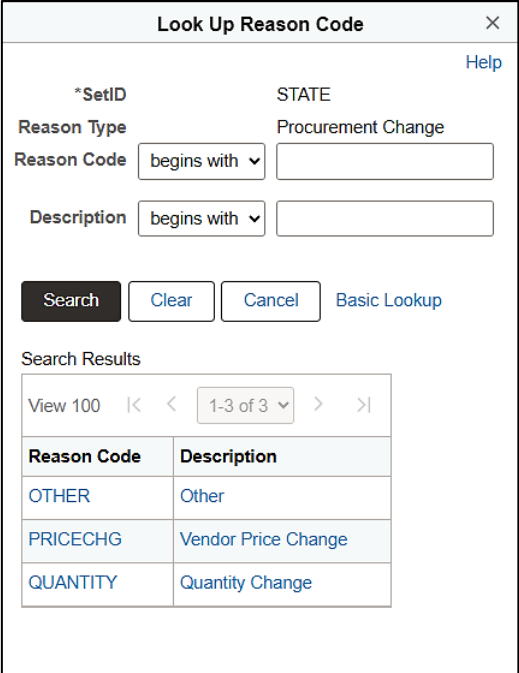
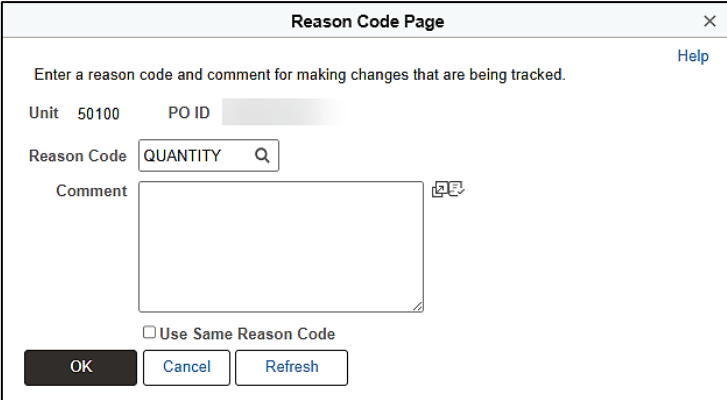
PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action																						
	A message displays stating that the current action will create a Change Order. This action will create a change order. Continue? (10200,27) The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time. Yes No																						
13.	Click the Yes button. Yes No																						
	The Merchandise Amount field is updated. Lines ⓘ Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving ⌵ <table><tr><th>Line</th><th></th><th>Item</th><th>Description</th><th></th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Price</th><th>Merchandise Amount</th><th>Status</th></tr><tr><td>1</td><td></td><td>7754528070</td><td>CALCIUM CHLORIDE, LIQUID CHLORIDE, CALCIUM, LIQUID, 32% SOLUTION F/SNOW</td><td></td><td> 8020.236 </td><td>GLL</td><td>7754528</td><td> 1.45000 </td><td> 11,629.34 </td><td>Approved</td></tr></table>	Line		Item	Description		PO Qty	*UOM	Category	Price	Merchandise Amount	Status	1		7754528070	CALCIUM CHLORIDE, LIQUID CHLORIDE, CALCIUM, LIQUID, 32% SOLUTION F/SNOW		8020.236	GLL	7754528	1.45000	11,629.34	Approved
Line		Item	Description		PO Qty	*UOM	Category	Price	Merchandise Amount	Status													
1		7754528070	CALCIUM CHLORIDE, LIQUID CHLORIDE, CALCIUM, LIQUID, 32% SOLUTION F/SNOW		8020.236	GLL	7754528	1.45000	11,629.34	Approved													
14.	Click the Save button. Save Return to Search Notify Refresh																						
	If an error message displays explaining that the PO amount cannot be reduced below the vouchered amount, proceed to the Adjusting the PO Quantity section in this job aid and complete the reconciliation from there. Cannot reduce PO amount below vouchered amount (39689.04) on line 1, sched 1. (10200,426) Cannot reduce PO schedule amount below vouchered amount. OK																						

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Step	Action
	A message displays in a pop-up window asking if the Requisition's open quantity should be increased. Increase requisition open quantity for Req 0002425676 line 1 schedule 1 by 3108.8300 LTN? (10200,367) When a distribution sources requisitions, you can have the system increase the open quantity by the decreased purchase order distribution quantity. Yes No
15.	Click the Yes button. Yes No
	The Reason Code Page displays in a pop-up window. Reason Code Page × Enter a reason code and comment for making changes that are being tracked. Help Unit 50100 PO ID Reason Code  Comment  ☐ Use Same Reason Code OK Cancel Refresh
16.	Click the Reason Code Look up icon. Reason Code 

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Step	Action
	The Look Up Reason Code page displays in a pop-up window. 
17.	Click the Quantity Change option. 
	The Reason Code Page redisplay. 



Procurement Job Aid

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Step	Action
18.	Enter a comment in the Comment field. Comment Adjusted the PO Qty to reconcile the PO.
19.	Click the OK button. OK Cancel Refresh
The Maintain Purchase Order page displays with a Receipt Status of "Received". Maintain Purchase Order Purchase Order Business Unit 50100 PO ID Change Order 1 Copy From *PO Date 12/01/2025 *Supplier TETRA TECH-004 *Supplier ID 0000041101 *Buyer PO Reference Contract 52759 Exp 06/25/2026 Web IMS?: ☒ Header Details PO Defaults PO Activities Requisitions Actions Supplier Search Supplier Details TETRA TECHNOLOGIES INC. Activity Summary Edit Comments Add ShipTo Comments Document Status PO Status Approved ☐ Hold From Further Processing Receipt Status Received Priority Medium *Dispatch Method Print eVA PO Type R01 eVA Order Method URL eVA Interfaced NSEV eVA Dttm eVA Procure Type Supplies - Non-Technology eVA Confirming Order: ☒ Amount Summary Merchandise 11,629.34 Freight/Tax/Misc. 0.00 Total Amount 11,629.34 USD Dispatch Calculate	
20.	Click the Activity Summary link. Web IMS?: ☒ Header Details PO Defaults PO Activities Requisitions Actions Activity Summary Edit Comments Add ShipTo Comments Document Status



PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action
	It's a good idea to first close the Activity Summary browser tab opened previously.

The **Activity Summary** page displays in a new browser tab.

Activity Summary

Business Unit50100

Purchase Order

Merchandise Amount11,629.34 USD

Merchandise Receipt11,629.34 USD

Merchandise Returned0.00 USD

Merchandise Invoice11,629.34 USD

Merchandise Matched11,629.34 USD

PO StatusApproved

SupplierTETRA TECHNOLOGIES INC

Supplier LocationMAIN

Lines

1-1 of 1

View All

Details

Receipt

Invoice

Matched

RTV

IID

Line	Line Details	Item	Item Description	UOM	Manufacturer ID	Mfg Item ID	UPN T
1		7754528070	CALCIUM CHLORIDE, LIQUID CHLOR	GLL			

Return to Search

Notify

21.	Click the Receipt Tab.
	Details Receipt Invoice Matched RTV IID

The **Open Quantity** field is now set to zero.

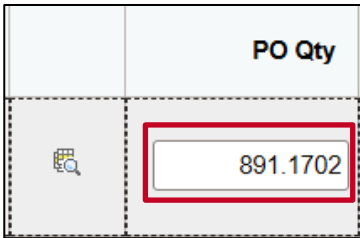
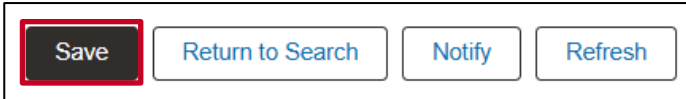
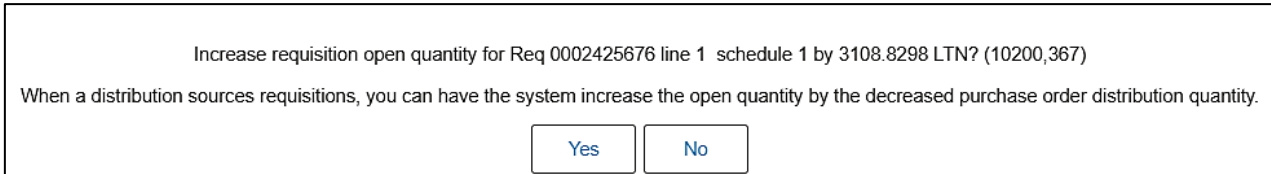
Qty Received	Qty Accepted	Open Quantity
8020.236	8020.236	0

PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

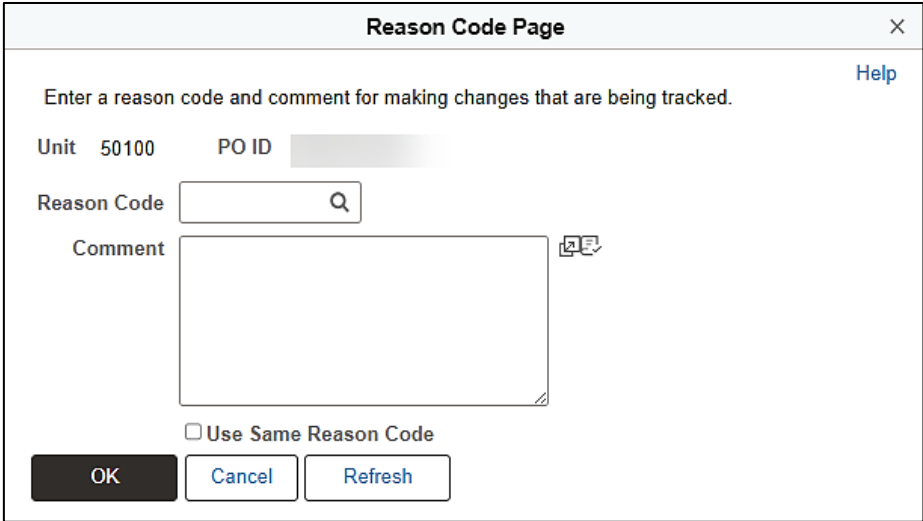
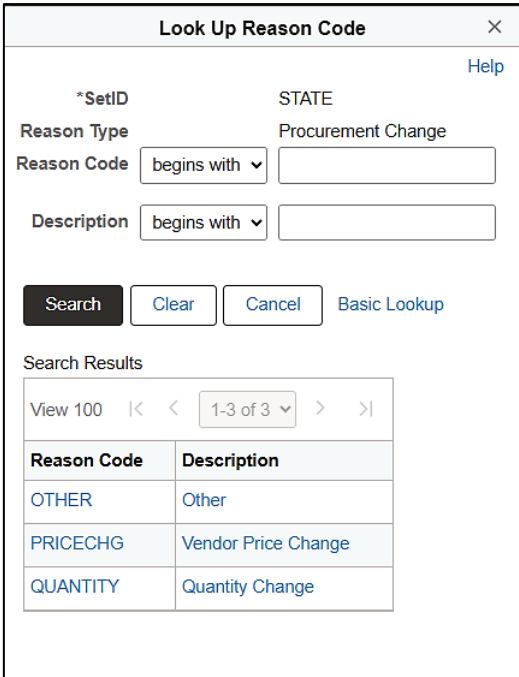
Adjusting the PO Quantity

If the user receives an error message saying the PO amount cannot be reduced below the vouchered amount, the user should increase the PO Qty by the smallest amount possible. For example, by 0.0002.

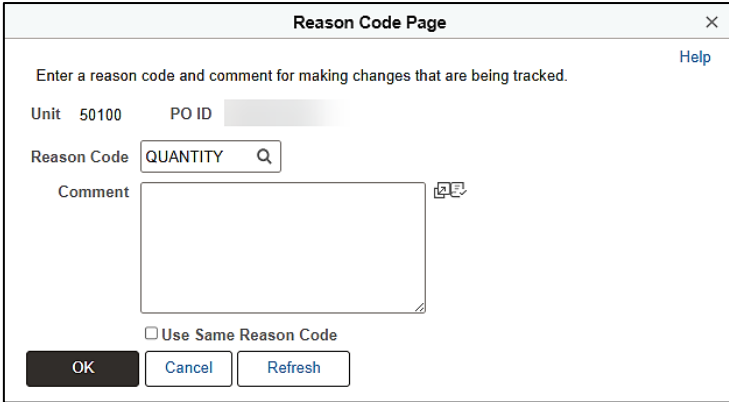
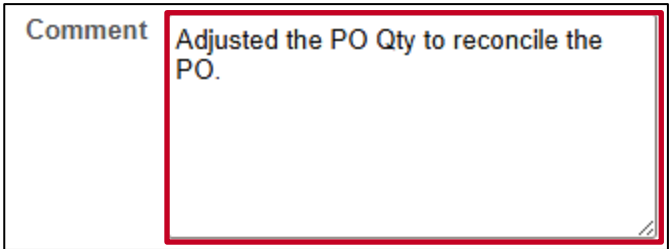
Note that the example below is different than the one in the previous section.

Step	Action
1.	Enter the adjusted amount in the PO Qty field. (In this example, .0002 was added to 891.17) 
2.	Click the Save button. 
A message displays in a pop-up window, asking if the Requisition's open quantity should be increased. 	
3.	Click the Yes button. 

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Step	Action
	The Reason Code Page displays in a pop-up window. 
4.	Click the Reason Code Look up icon. 
	The Look Up Reason Code page displays in a pop-up window. 

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Step	Action
5.	Click the Quantity Change option. 
The Reason Code Page redispays. 	
6.	Enter a comment in the Comment field. 
7.	Click the OK button. 



Procurement Job Aid

PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action
	The Maintain Purchase Order page displays. Maintain Purchase Order Purchase Order Business Unit 50100 PO Status Approved ▲ ✖ PO ID Change Order 1 Current Change Reason Copy From ☐ Hold From Further Processing ▼ Header ⓘ *PO Date 12/03/2025 Supplier Search *Supplier MORTON SAL-002 Supplier Details *Supplier ID 0000110428 Morton Salt Incorporated *Buyer PO Reference Contract #49440 (9/30/26) Web IMS?: ☒ Header Details PO Defaults PO Activities Requisitions ▼ Actions Activity Summary Edit Comments Add ShipTo Comments Document Status Receipt Status Partial Priority Medium ▼ *Dispatch Method Print ▼ Dispatch eVA PO Type R01 Routine Bill Vendor eVA Order Method URL eVA Interfaced NSEV eVA Dtm eVA Procure Type eVA Confirming Order: ☐
8.	Click the Activity Summary link. Web IMS?: ☒ Header Details PO Defaults PO Activities Requisitions ▼ Actions Activity Summary Edit Comments Add ShipTo Comments Document Status

PR344 Reconciling a WebIMS Purchase Order (VDOT Only)

Step	Action																
	The Activity Summary page displays in a new browser tab. Activity Summary Business Unit50100 PO StatusApproved Purchase Order SupplierMorton Salt Incorporated Supplier LocationMAIN Merchandise Amount115,014.43 USD Merchandise Receipt115,014.42 USD Merchandise Returned0.00 USD Merchandise Invoice115,014.42 USD Merchandise Matched115,014.40 USD Lines << < 1-1 of 1 > >> View All Details Receipt Invoice Matched RTV <table><thead><tr><th>Line</th><th>Line Details</th><th>Item</th><th>Item Description</th><th>UOM</th><th>Manufacturer ID</th><th>Mfg Itm ID</th><th>UPN T</th></tr></thead><tbody><tr><td>1</td><td></td><td>7754577327</td><td>SALT, SODIUM CHLORIDE, FOR ROA</td><td>LTN</td><td></td><td></td><td></td></tr></tbody></table> Return to Search Notify	Line	Line Details	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	UPN T	1		7754577327	SALT, SODIUM CHLORIDE, FOR ROA	LTN			
Line	Line Details	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	UPN T										
1		7754577327	SALT, SODIUM CHLORIDE, FOR ROA	LTN													
9.	Click the Receipt Tab. Details Receipt Invoice Matched RTV The difference in the quantity displays in the Open Quantity field. <table><thead><tr><th>Qty Received</th><th>Qty Accepted</th><th>Open Quantity</th></tr></thead><tbody><tr><td>891.17</td><td>891.17</td><td>0.0002</td></tr></tbody></table>	Qty Received	Qty Accepted	Open Quantity	891.17	891.17	0.0002										
Qty Received	Qty Accepted	Open Quantity															
891.17	891.17	0.0002															
	As indicated in IMS procedures, open quantities are not received in Cardinal. Please submit a help desk ticket to VCCC@vita.virginia.gov and include “Cardinal PR Helpdesk” in the subject line (or it may not get routed to the correct team). Once received the Cardinal PPS Team will update the Received Status from “Partial” to “Received” to initiate the PO transmittal to eVA.																