

### About Professional Services Purchase Orders:

According to the Agency Procurement and Surplus Property Manual, published by the Department of General Services, “Professional Services as defined in § 2.2-4301 of the **VPPA** means work performed by an independent contractor within the scope of the practice of accounting, actuarial services, architecture, land surveying, landscape architecture, law, dentistry, medicine, optometry, pharmacy, professional engineering, and the services of an economist procured by the State Corporation Commission.”

Cardinal tracks professional services expenditures against contracts using a purchase order (PO), and subsequent task orders, i.e., change order, as a means to manage contract activities. This process allows for easy reference and reporting.

POs, as well as subsequent task orders, are sent electronically through eVA to the vendor to confirm orders. The following is a typical scenario used to create a Professional Services PO and add a task order related to a contract.

For more detailed instructions on creating and managing POs please refer to the course titled **501 PR344: Processing Purchase Orders** and the job aid titled **501 PR344 Purchase Orders**.

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### Create Professional Services Purchase Order from a Contract

The PO is the principal tracking document and represents all activity related to the contract. In order to limit eVA fees, for each Professional Services contract, you would create only one PO. **Line 1** of the PO should be equal to the value of the contract. Each subsequent line added to the PO is deemed a task order, i.e., change order, executed against the contract. As each task order is added to the PO, **Line 1** of the PO is decremented for the same amount as the task order. As a result, the sum of the Professional Services PO lines is always equal to the contract. In the example below you will create of a Professional Services PO and subsequent task order against an existing contract.

- 1 To create the PO using the Professional Services contract navigate using the following path:

**Main Menu > Purchasing > Purchase Orders > Add/Update POs**



**Purchase Order**

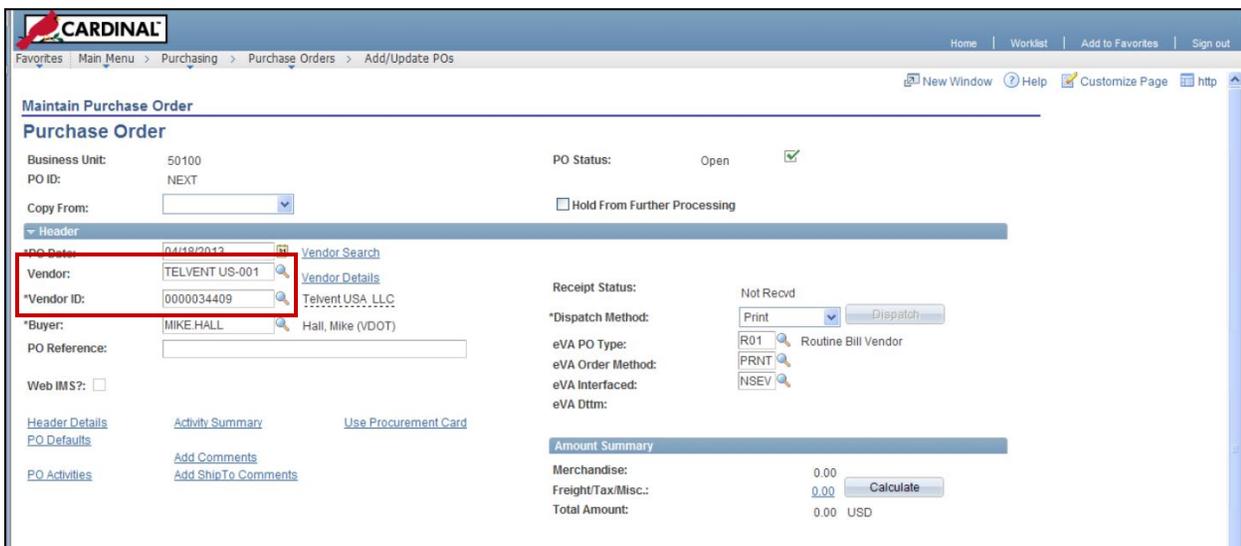
Find an Existing Value | **Add a New Value**

Business Unit: 50100  
PO ID: NEXT

Add

Find an Existing Value | Add a New Value

- 2 Select the **Add a New Value** tab:
  - a. **Business Unit = 50100**
  - b. **PO ID = NEXT** and should not be changed. Cardinal assigns a **PO ID** number when you successfully save the PO.
- 3 Click **Add**. The **Maintain Purchase Order – Purchase Order** page will display.



**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Open

PO ID: NEXT

Copy From:   Hold From Further Processing

**Header**

\*PO Date: 04/18/2013 [Vendor Search](#)

Vendor: **TELVENT US-001** [Vendor Details](#)

\*Vendor ID: 0000034409 [Telvent USA, LLC](#)

\*Buyer: MIKE HALL [Hall, Mike \(VDOT\)](#)

PO Reference:

Web IMS?:

[Header Details](#) [Activity Summary](#) [Use Procurement Card](#)

[PO Defaults](#) [Add Comments](#)

[PO Activities](#) [Add ShipTo Comments](#)

Receipt Status: Not Recvd

\*Dispatch Method: Print

eVA PO Type: R01 [Routine Bill Vendor](#)

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

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

- 4 Enter the vendor by **Vendor** (name) or **Vendor ID (0000034409)** for your contract. You must enter the vendor in order to narrow down the contracts you may copy from in the next step.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Open

PO ID: NEXT  Hold From Further Processing

Copy From: **Contract**

PO Date: Vendor Search

Vendor: Vendor Details

\*Vendor ID: 0000034409 Telvent USA, LLC

\*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference:

Web IMS?:

Receipt Status: Not Recvd

\*Dispatch Method: Print Dispatch

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

Merchandise: 0.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 0.00 USD

Add Items From: Purchasing Kit Catalog Item Search

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

View Approvals Close Short All Lines \*Go to: More ...

Save Notify Refresh Add Update/Display

- Using the **Copy From** drop-down arrow select **Contract**. The **Maintain Purchase Order - Copy Purchase Order from Contract** page will display.

**Maintain Purchase Order**

**Copy Purchase Order from Contract**

Contract Selection Criteria

Contract SetID: STATE Vendor: TELVENT US-001

Contract ID: 000000000000000000041135 Vendor ID: 0000034409

Allow Open Item Contract Only Master Contract:

Search

Select Contract

Select	SetID	Contract	Description	Vendor ID	Begin Date	Expire Date
<input checked="" type="checkbox"/>	STATE	000000000000000000041135	NORTHERN REGION TOC OPERATIONS	0000034409	12/06/2012	12/31/2013

OK Cancel Refresh

- Enter, or search for, the **Contract ID (000000000000000000041135)**.
- Click on the **Search** button.
- Select the contract check box and click **OK**. The **Maintain Purchase Order – Purchase Order** page will display.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Open

PO ID: NEXT  Hold From Further Processing

Copy From:

**Header**

\*PO Date: 04/18/2013 Vendor Search

Vendor: TELVENT US-001 Vendor Details

\*Vendor ID: 0000034409 Telvent USA, LLC

\*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: **NORTHERN REGION TOC OPERATIONS**

Receipt Status: Not Recvd

\*Dispatch Method: Print Dispatch

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 5,661,072.40 USD

**Lines**

Attributes

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN	1.0000	EA	968846	5661072.40000	5,661,072.40	Open

9 The PO is updated with the contract details. Contract line data is populated.

10 Click on the **Attributes** tab.

**Lines**

Attributes

Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only
1		NORTHERN	Goods	Line Quali	Due	<input checked="" type="checkbox"/>

11 Check the **Amount Only** check box.

12 Click on the **Details** tab.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Open

PO ID: NEXT  Hold From Further Processing

Copy From:

**Header**

\*PO Date: 04/18/2013  [Vendor Search](#)

Vendor: TELVENT US-001  [Vendor Details](#)

\*Vendor ID: 0000034409  Telvent USA, LLC

\*Buyer: MIKE HALL  Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Receipt Status: Not Recvd

\*Dispatch Method: Print  [Dispatch](#)

eVA PO Type: R01  Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 [Calculate](#)

Total Amount: 5,661,072.40 USD

**Add Items From**

Purchasing Kit  Catalog  Item Search

**Lines**

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN	1.0000	EA	968848	5,661,072.40	5,661,072.40	Open

[View Approvals](#) [Close Short All Lines](#) \*Go to:

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**13** The **PO Qty** value is 1 and cannot be changed.

**14** Update the **Price** to match the total contract value.

**15** Click on the **Schedule** icon. The **Maintain Purchase Order – Schedules** page will display.

**Maintain Purchase Order**

**Schedules**

Unit: 50100 Vendor: TELVENT US-001 PO Status: Open

PO ID: NEXT PO Date: 04/18/2013

[Return to Main Page](#)

**Lines**

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amt	Status
1	NORTHERN REGION TOC		1.0000	EA		5,661,072.40	5,661,072.40	Active

**Schedules**

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	04/18/2013	CNTRL OF2	1.0000	5,661,072.40000	5,661,072.40	Active

[Add ShipTo Comments](#) [Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**16** Values default in as shown. Change as necessary.

**17** Click on the **Distribution** icon. The **Maintain Purchase Order – Distribution for Schedule X** page will display.

**Maintain Purchase Order**  
Distributions for Schedule 1

Unit: 50100 Vendor: TELVENT US-001  
PO ID: NEXT Item: [NORTHERN REGION TOC](#)  
Line: 1 Status: Active  
Schedule: 1

\*Distribute By: Amount Schedule Qty: 1.0000  
Merchandise Amount: 5,661,072.40 USD  
SpeedChart: Multi-SpeedCharts Doc. Base Amount: 5,661,072.40 USD

Dist	Status	Percent	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Center
1	Open	100.0000	5,661,072.40	USD	50100		5012550	04100	604004	19064	

OK Cancel Refresh

**18** Enter a valid accounting distribution, i.e., chart of account values. In this case, you might enter an administrative chart of account values since this is not project specific at this time. When the task orders are subsequently created you will enter the specific project chart of account values.

**19** Click **OK**. The **Maintain Purchase Order – Schedules** page will display.

**Maintain Purchase Order**  
Schedules

Unit: 50100 Vendor: TELVENT US-001 PO Status: Open  
PO ID: NEXT PO Date: 04/18/2013

[Return to Main Page](#)

Line: 1 Item: [NORTHERN REGION TOC](#) PO Qty: 1.0000 EA Merchandise Amt: 5,661,072.40 USD

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	04/18/2013	CNTRL OF2	1.0000	5,661,072.40000	5,661,072.40	Active

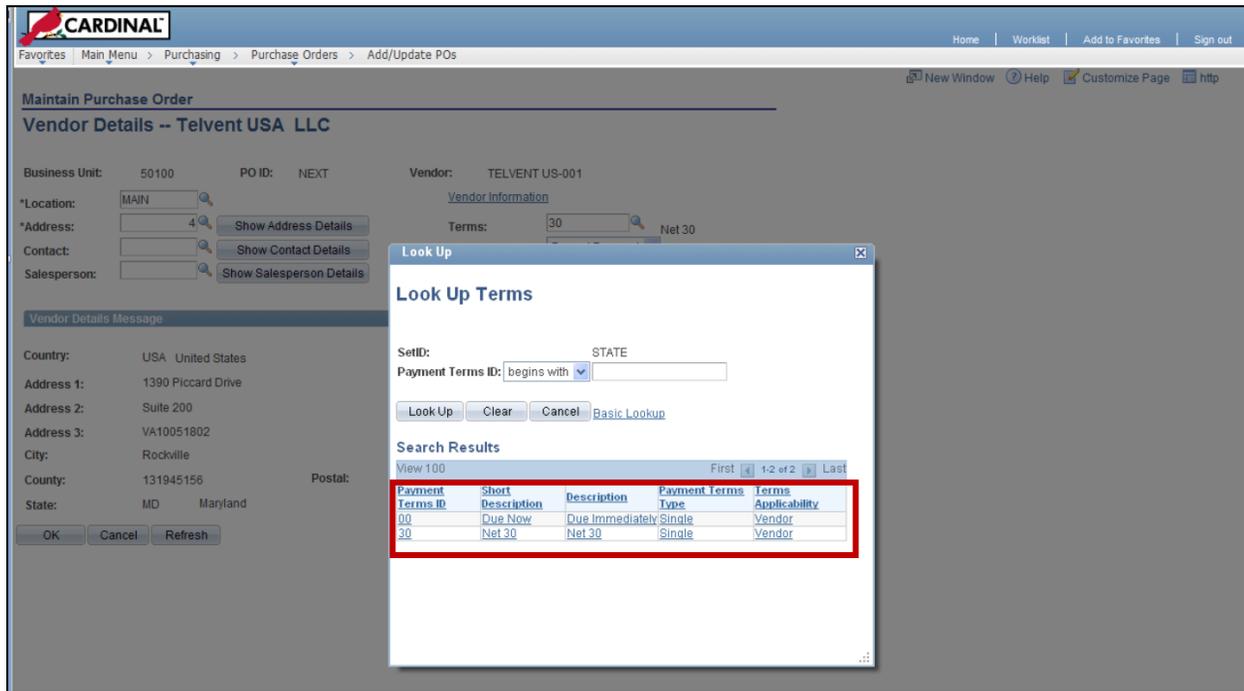
Save Notify Refresh Add Update/Display

**20** Click the **Return to Main Page** hyperlink. The **Maintain Purchase Order – Purchase Order** page will display.

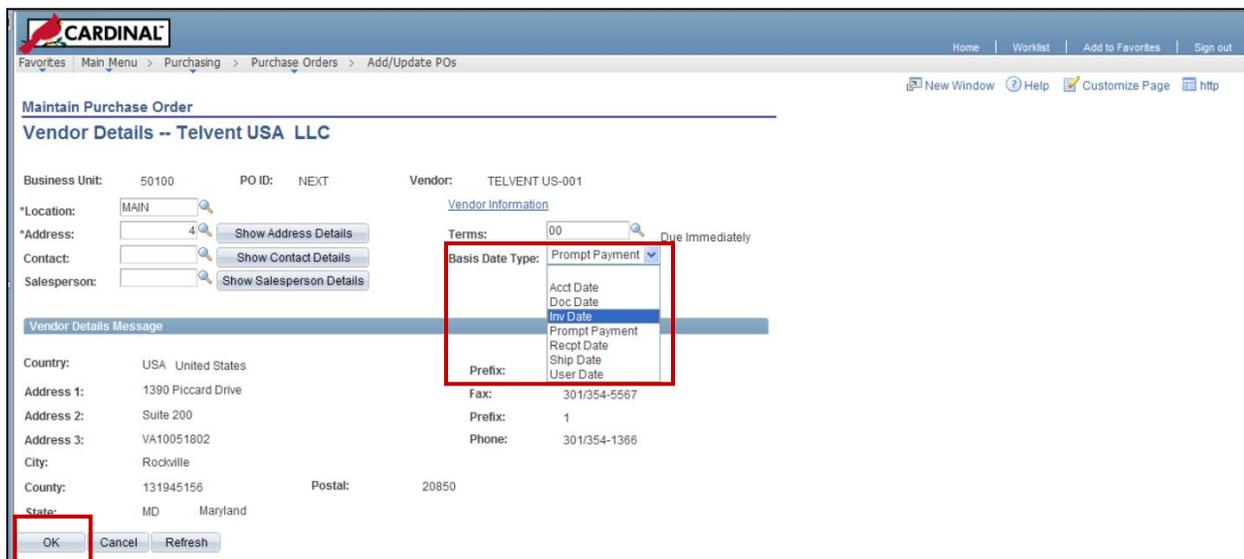
**21** Click on the **Vendor Details** hyperlink. The **Maintain Purchase Order – Vendor Details – XXX** page will display.

**22** The **Address** defaults. Using the look-up icon you may change the **Address** if necessary.

**23** Click on **Terms** lookup icon.



**24** Select the **Payment Terms ID** of **00** (Due Immediately).



**25** Click on the **Basis Date Type** drop-down and select **Inv Date**.

**26** Click **OK**. The **Maintain Purchase Order – Purchase Order** page displays.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Open

PO ID: NEXT  Hold From Further Processing

Copy From:

**Header**

\*PO Date: 04/18/2013  [Vendor Search](#)

Vendor: TELVENT US-001  [Vendor Details](#)

\*Vendor ID: 0000034409  Telvent USA, LLC

\*Buyer: MIKE HALL  Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Receipt Status: Not Recvd

\*Dispatch Method: Print  [Dispatch](#)

eVA PO Type: R01  Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 [Calculate](#)

Total Amount: 5,661,072.40 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

**Lines**

Details | Ship To/Due Date | Statuses | Item Information | Attributes | BFQ | Contract | **Receiving** | Customize | End | View All | First | 1 of 1 | Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN	1.0000	EA	968848	5661072.400	5,661,072.40	Open

[View Approvals](#) [Close Short All Lines](#) \*Go to:

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**27** Click on **Receiving** tab.

**Purchase Order**

Business Unit: 50100 PO Status: Open

PO ID: NEXT  Hold From Further Processing

Copy From:

**Header**

\*PO Date: 04/18/2013  [Vendor Search](#)

Vendor: TELVENT US-001  [Vendor Details](#)

\*Vendor ID: 0000034409  Telvent USA, LLC

\*Buyer: MIKE HALL  Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Receipt Status: Not Recvd

\*Dispatch Method: Print  [Dispatch](#)

eVA PO Type: R01  Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 [Calculate](#)

Total Amount: 5,661,072.40 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

**Lines**

Details | Ship To/Due Date | Statuses | Item Information | Attributes | BFQ | Contract | **Receiving** | Customize | End | View All | First | 1 of 1 | Last

Line	Item	Description	*Receiving Required	Close Short
1		NORTHERN	Do Not	<input type="checkbox"/>

[View Approvals](#) [Close Short All Lines](#) \*Go to:

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**28** In the **Receiving Required** field, using the drop-down arrow, select **Do Not**.

**29** Remember to add comments, and any attachments desired, to your PO.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100  
 PO ID: 0001056490  
 PO Status: Open

Copy From:

Hold From Further Processing

**Header**

\*PO Date: 04/18/2013 Vendor Search  
 Vendor: TELVENT US-001 Vendor Details  
 \*Vendor ID: 0000034409 Telvent USA, LLC  
 \*Buyer: MIKE HALL Hall, Mike (VDOT)  
 PO Reference: NORTHERN REGION TOC OPERATIONS

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

**Amount Summary**

Merchandise: 5,661,072.40  
 Freight/Tax/Misc.: 0.00 Calculate  
 Total Amount: 5,661,072.40 USD

**Add Items From** Catalog Item Search

**Select Lines To Display**  
 Line:  To:  Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN	1.0000	EA	968848	5,661,072.40000	5,661,072.40	Open

View Approvals Close Short All Lines \*Go to: ... More ...

Save Return to Search Notify Refresh Add Update/Display

- 30 Click **Save**.
- 31 Cardinal assigns a **PO ID** number upon save and the **PO Status** is set to **Open**.
- 32 Click on the **PO Submit for Approval** checkbox (the green checkmark) which is next to the **PO Status** field, to send it forward for approval by your supervisor.
- 33 The PO will continue on through normal PO processing. Once the Purchase Order is dispatched, the PO is complete and ready to accept vouchers. For more detailed instructions on creating and managing POs please refer to the course titled **501 PR344 Processing Purchase Orders** and the job aid titled **501 PR344 Purchase Orders**.

### Updating a Professional Services PO - Task Orders

The PO is the principal tracking document and represents all activity related to the contract. In order to limit eVA fees, for each Professional Services contract, you would create only one PO. **Line 1** of the PO should be equal to the value of the contract. Each subsequent line added to the PO is deemed a task order, i.e., change order, executed against the contract. As each task order is added to the PO, **Line 1** of the PO is decremented for the same amount as the task order. As a result, the sum of the Professional Services PO lines is always equal to the contract. In the example below you will create of a Professional Services PO and subsequent task order against an existing contract.

#### Find the Related Purchase Order

- 1 Search for the Professional Services contract you wish to work with by navigating using the following path:

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

**Contract Entry - Contract**

SetID: STATE  
 Contract ID: 000000000000000000041135  
 \*Status: Approved  
 Administrator/Buyer: FREDERICK.HAASCH

**Contract Version**  
 Version: 1 Status: Current  
 New Version Approved Date: 11/28/2012

Administrator/Buyer: FREDERICK.HAASCH Haasch, Frederick G. (VDOT)

**Header**

Process Option: Purchase Order  
 Vendor: TELVENT US-001  
 Vendor ID: 000034409 TelventUSA LLC  
 Begin Date: 12/06/2012  
 Expire Date: 12/31/2013  
 Renewal Date:  
 Currency: USD CRRNT  
 Primary Contact: 1 Accounts Payable  
 Vendor Contract Ref:  
 Description: NORTHERN REGION TOC OPERATIONS  
 Master Contract ID:  
 Tax Exempt

**Amount Summary**

Maximum Amount:	5,661,072.40 USD
Line Item Released Amount:	5,661,072.40
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	5,661,072.40
Remaining Amount:	0.00
Remaining Percent:	0.00

**Contract Items**

TRAFFIC CONTROL SERVICES

Line	Item	Description	UOM	Category	Include for Release	Status
1		NORTHERN REGION TOC	EA	9688480	<input checked="" type="checkbox"/>	Active

- 2 Once you have selected your contract, from the **Contract Entry – Contract** page click on **Document Status** hyperlink.

**Document Status**

SetID: STATE Contract: 0000000000000000000041135  
 Document Date: 12/06/2012 Status: Approved  
 Currency: USD Document Type: Contract  
 Buyer: Haasch, Frederick G. (VDOT) Released Amount: 5,661,072.40  
 Short Vendor Name: TELVENT US-001

Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location
50100	Purchase Order	0001056490	Dispatched	04/18/2013	0000034409	MAIN
50100	Requisition	0002032115	Approved	10/09/2012		
50100	Strategic Sourcing Event	0000150693	Awarded	11/28/2012		

- 3 Related documents, such as requisitions, sourcing events, POs, and payments are displayed.
- 4 You can click on a **DOC ID** hyperlink to view that document's details. For a PO document the **DOC ID** is the same as the **PO ID** number. You will use this number to find and update the PO.

### Create the Task Order

- 5 Search for the PO using the following path:

**Main Menu > Purchasing > Purchase Orders > Add/Update POs**

**Purchase Order**

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

Find an Existing Value | Add a New Value

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

Business Unit: 50100

PO ID: begins with 0001056490

Purchase Order Date: =

PO Status: =

Short Vendor Name: begins with

Vendor ID: begins with

Vendor Name: begins with

Buyer: begins with

Buyer Name: begins with

PO Type: =

Purchase Order Reference: begins with

Hold From Further Processing

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

- 6 Select the **Find an Existing Value** tab.
- 7 Enter the **PO ID**, i.e., Purchase Order **DOC ID**.
- 8 Click on the **Search** button. The **Maintain Purchase Order – Purchase Order** page is displayed.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Dispatched ▲ ✖

PO ID: 0001056490  Hold From Further Processing

Copy From:

**Header**

\*PO Date: 04/18/2013 Vendor Search

Vendor: TELVENT US-001 [Vendor Details](#)

\*Vendor ID: 0000034409 Telvent USA, LLC

\*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Web IMS?:

Backorder Status: Not Backordered [Create BackOrder](#)

Receipt Status: Not Recvd

\*Dispatch Method: Print [Dispatch](#)

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 [Calculate](#)

Total Amount: 5,661,072.40 USD

**Add Items From**  [Catalog](#) [Item Search](#)

**Select Lines To Display**

Line:  To:  [Retrieve](#)

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN REGION TOC	1.0000	EA	968846	5,661,072.40000	5,661,072.40	Approved

View Approvals [Close Short All Lines](#) \*Go to:

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

- 9 The PO is displayed. Confirm that **Line 1** matches the contract value.
- 10 Click on blue triangle **Change Order** icon to initiate the task order, i.e., change order.
- 11 Click on the plus + icon to the right of **Line 1** to add a new line. The **Explorer User Prompt** pop-up is displayed.

**Explorer User Prompt**

Script Prompt:

Enter number of rows to add:

[OK](#) [Cancel](#)

- 12 Enter the number of lines you would like to add.
- 13 Click **OK**. The **Maintain Purchase Order – Purchase Order** page is displayed.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Dispatched

PO ID: 0001056490

Copy From: [Dropdown]

**Header**

\*PO Date: 04/18/2013 Vendor Search

Vendor: TELVENT US-001 Vendor Details

\*Vendor ID: 0000034409 Telvent USA, LLC

\*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Web IMS?:

Backorder Status: Not Backordered Create BackOrder

Receipt Status: Not Recvd

\*Dispatch Method: Print Dispatch

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interface: NSEV

eVA Dtm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 5,661,072.40 USD

Add Items From: Catalog Item Search

Select Lines To Display: Line: [ ] To: [ ] Retrieve

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN REGION TOC	1.0000	EA	968848	5,661,072.40000	5,661,072.40	Approved
2						0	0.000	Pending

View Approvals Close Short All Lines \*Go to: ... More ...

14 The new line(s) is shown and is available for insertion of values.

15 Click on **Contract** tab.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Dispatched

PO ID: 0001056490

Copy From: [Dropdown]

**Header**

\*PO Date: 04/18/2013 Vendor Search

Vendor: TELVENT US-001 Vendor Details

\*Vendor ID: 0000034409 Telvent USA, LLC

\*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Web IMS?:

Backorder Status: Not Backordered Create BackOrder

Receipt Status: Not Recvd

\*Dispatch Method: Print Dispatch

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interface: NSEV

eVA Dtm:

**Amount Summary**

Merchandise: 5,661,072.40

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 5,661,072.40 USD

Add Items From: Catalog Item Search

Select Lines To Display: Line: [ ] To: [ ] Retrieve

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release	Milestone Li
1		NORTHERN REGION TOC	STATE	000000000000000000041135		1	1		1
2			STATE						

View Approvals Close Short All Lines \*Go to: ... More ...

16 Click on **Contract Search** icon on the line you created. The **Contract Search** page is displayed.

**Contract Search**

Search Criteria

SetID: STATE Vendor SetID: STATE  
 Contract ID: [text box] Vendor ID: 0000034409 Telvent USA LLC  
 Contract Process Option: [dropdown] Item SetID: STATE  
 Description: [text box] Item ID: [text box]  
 Master Contract ID: [text box] Item Description: [text box]  
 Contract Reference Type: [dropdown] Category: [text box]  
 PO Date: 04/18/2013 Corporate Contract: [dropdown]

**Search** Clear

**Contract Details**

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price
<input checked="" type="checkbox"/>	0000000000000000000000041135	1	Line Item	9688480		NORTHERN REGION TOC	5661072.40000
<input type="checkbox"/>	000000000000000000000040503	1	Line Item	9189601	9189601000	TRANSPORTATION CONSULTING TRANSPORTATION CONSULTING	1.00000
<input type="checkbox"/>	0000000000000000000032645	1	Line Item	9204501	9204501000	SOFTWARE MAINTENANCE/SUPPORT SOFTWARE MAINTENANCE/SUPPORT	240000.00000
<input type="checkbox"/>	0000000000000000000032645	1	Line Item	9204501	9204501000	SOFTWARE MAINTENANCE/SUPPORT SOFTWARE MAINTENANCE/SUPPORT	360000.00000
<input type="checkbox"/>	0000000000000000000032645	1	Open Item				

**OK** Cancel Refresh

17 The Vendor information has prepopulated.

18 Click the **Search** Button.

19 Select the contract / line you wish to use to populate the PO line.

20 Click **OK**. The **Maintain Purchase Order – Purchase Order** page is displayed.

PO Defaults Requisitions PO Activities Document Status Edit Comments Add ShipTo Comments

**Amount Summary**

Merchandise: 11,322,144.80  
 Freight/Tax/Misc.: 0.00 Calculate  
 Total Amount: 11,322,144.80 USD

Add Items From: Catalog Item Search

Select Lines To Display: Line: [text box] To: [text box] Retrieve

**Lines**

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release	Milestone LI
1		NORTHERN REGION TOC	STATE	00000000000000000000041135	1	1		1	
2		NORTHERN	STATE	00000000000000000000041135	1	1			

View Approvals Close Short All Lines \*Go to: ... More ...

21 The **Description**, **Contract ID**, and **Contract Line** number from the selected contract populate the newly added line.

22 Click the **Details** tab.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN REGION TOC	1.0000	EA	968846	5600000.00000	5,600,000.00	Approved
2		TASK ORDER # 1	1.0000	EA	968846	61,072.40000	61,072.40	Pending

- 23 On the new **Line**, e.g., **Line 2**, update the **Description** text to identify the line as a task order.
- 24 On the new **Line**, e.g., **Line 2**, insert the value of the task order in to the **Price** field.
- 25 On **Line 1**, decrement the **Merchandise Amount** field by the amount of the new line - task order (in this example **Line 2**).
- 26 Confirm that the sum of all the PO lines equal the original PO amount, which is equal to the total contract value. (Sum PO Lines = Original PO Total = Contract Total)
- 27 Click the **Attributes** tab.

Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only
1		NORTHERN REGION TOC	Goods	Line Quali	Due	<input type="checkbox"/>
2		TASK ORDER # 1	Goods	Line Quali	Due	<input checked="" type="checkbox"/>

- 28 On the new line, e.g., **Line 2**, select the **Amount Only** checkbox.
- 29 Click the **Details** tab.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Dispatched  
 PO ID: 0001056490  
 Copy From: [Dropdown]  Hold From Further Processing

**Header**

\*PO Date: 04/18/2013 Vendor Search  
 Vendor: TELVENT US-001 Vendor Details  
 \*Vendor ID: 0000034409 Telvent USA, LLC  
 \*Buyer: MIKE.HALL Hall, Mike (VDOT)  
 PO Reference: NORTHERN REGION TOC OPERATIONS

Backorder Status: Not Backordered Create BackOrder  
 Receipt Status: Not Recvd  
 \*Dispatch Method: Print Dispatch  
 eVA PO Type: R01 Routine Bill Vendor  
 eVA Order Method: PRNT  
 eVA Interface: NSEV  
 eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40  
 Freight/Tax/Misc.: 0.00 Calculate  
 Total Amount: 5,661,072.40 USD

**Lines**

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN REGION TOC	1.0000	EA	96884E	5600000.00000	5,600,000.00	Approved
2		TASK ORDER # 1	1.0000	EA	96884E	61,072.40000	61,072.40	Pending

**30** On the new line, e.g., **Line 2**, click the **Schedule** icon. The **Maintain Purchase Order – Schedules** page is displayed.

**Maintain Purchase Order**

**Schedules**

Unit: 50100 Vendor: TELVENT US-001 PO Status: Dispatched  
 PO ID: 0001056490 PO Date: 04/18/2013

**Lines**

Line: 2 Item: TASK ORDER # 1 PO Qty: 1.0000 EA Merchandise Amt: 61,072.40 USD

**Schedules**

Sched	Due Date	Ship To	PO Qty	Price	Merchandise Amount	Status
1	04/18/2013	PRISTL DS1	1.0000	61,072.40000	61,072.40	Active

**31** If necessary, edit **Due Date** and **Ship To** specific to this task order.

**32** Click the **Distribution** icon. The **Maintain Purchase Order – Distributions for Schedule 1** page is displayed.

**Maintain Purchase Order**

**Distributions for Schedule 1**

Unit: 50100 Vendor: TELVENT US-001  
 PO ID: 0001056490 Item: [TASK ORDER # 1](#)  
 Line: 2  
 Schedule: 1 Status: Active

\*Distribute By: Quantity Schedule Qty: 1.0000  
 Merchandise Amount: 61,072.40 USD  
 Doc. Base Amount: 61,072.40 USD

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Cen
1	Open	100.0000	1.0000	61,072.40	USD	50100		5012550	04100	604004	19064	

OK Cancel Refresh

**33** Enter accounting distribution specific to the task order.

**34** Click **OK**. The **Maintain Purchase Order – Purchase Order** page is displayed.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Dispatched  
 PO ID: 0001056490  
 Copy From: [Dropdown]  
 Hold From Further Processing

**Header**

\*PO Date: 04/18/2013 Vendor Search  
 Vendor: TELVENT US-001 Vendor Details  
 \*Vendor ID: 0000034409 Telvent USA, LLC  
 \*Buyer: MIKE HALL Hall, Mike (VDOT)  
 PO Reference: NORTHERN REGION TOC OPERATIONS

Web IMS?:

Backorder Status: Not Backordered [Create BackOrder](#)  
 Receipt Status: Not Recvd  
 \*Dispatch Method: Print Dispatch  
 eVA PO Type: R01 Routine Bill Vendor  
 eVA Order Method: PRNT  
 eVA Interfaced: NSEV  
 eVA Dttm:

**Amount Summary**

Merchandise: 5,661,072.40  
 Freight/Tax/Misc.: 0.00 Calculate  
 Total Amount: 5,661,072.40 USD

Add Items From: Catalog Item Search

Select Lines To Display  
 Line: [Dropdown] To: [Dropdown] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN REGION TOC	1.0000	EA	96884E	5600000.00000	5,600,000.00	Approved
2		TASK ORDER # 1	1.0000	EA	96884E	61,072.40000	61,072.40	Pending

Close Short All Lines \*Go to: More ...

**35** Remember to add comments, and any attachments desired, to your newly added task order line on the PO.

**36** Click **Save**. The **Change Reason** page will be displayed.

**37** Enter Reason Code and Comment.

**38** Click OK. The Maintain Purchase Order – Purchase Order page is displayed.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		NORTHERN REGION TOC	1.0000	EA	96884E	5,600,000.00000	5,600,000.00	Pending
2		TASK ORDER # 1	1.0000	EA	96884E	61,072.41000	61,072.41	Pending

**39** The PO Status is updated to **Pend Approval**, i.e., pending approval.

**40** Click on the **Edit Comments** icon to add required comments at the PO level. The **PO Header Comments** page is shown.

**41** Click on the + icon to add a new comment.

**42** Enter comment(s) specific to this task order for approval justification.

**43** Check the **Approval Justification** checkbox.

**44** Click **OK**. The **Maintain Purchase Order – Purchase Order** page is displayed.

**Purchase Order**

Business Unit: 50100 PO Status: Pend Appr ▲ ✖

PO ID: 0001056490

Change Order: 1

Copy From:

Hold From Further Processing [Current Change Reason](#)

---

**Header**

\*PO Date: 04/18/2013  Vendor Search

Vendor: TELVENT US-001 [Vendor Details](#)

\*Vendor ID: 0000034409 Telvent USA, LLC

\*Buyer: MIKE HALL  Hall, Mike (VDOT)

PO Reference: NORTHERN REGION TOC OPERATIONS

Web IMS?:

[Header Details](#) [Activity Summary](#)  
[PO Defaults](#) [Document Status](#)  
[Requisitions](#) [Edit Comments](#)  
[PO Activities](#) [Add ShipTo Comments](#)

Backorder Status: Not Backordered [Create BackOrder](#)

Receipt Status: Not Recvd

\*Dispatch Method:  [Dispatch](#)

eVA PO Type: R01  Routine Bill Vendor

eVA Order Method: PRINT

eVA Interfaced: NSEV

eVA Dttm:

---

**Amount Summary**

Merchandise: 5,661,072.41

Freight/Tax/Misc.: 0.00 [Calculate](#)

Total Amount: 5,661,072.41 USD

---

Add Items From:  [Catalog](#) [Item Search](#)

Select Lines To Display: Line:  To:  [Retrieve](#)

---

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		NORTHERN REGION TOC	1.0000	EA	96884E	5,600,000.00000	5,600,000.00	Pending			
2		TASK ORDER # 1	1.0000	EA	96884E	61,072.41000	61,072.41	Pending			

[View Approvals](#) [Close Short All Lines](#) \*Go to:  [More ...](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**45** Click **Save**. The PO will route to your supervisor for approval. Task order approval is required by your supervisor because there was an insertion of a new task order line.

**46** You may click on the **View Approvals** hyperlink to view the **Justification** comment.

**View Approvals**

Business Unit: 50100 PO Status: Pend Appr

PO ID: 0001056490 PO Date: 04/18/2013

PO Total: 5,661,072.41 USD

Vendor ID: 0000034409 Telvent USA, LLC

Buyer: MIKE HALL

PO Reference: NORTHERN REGION TOC OPERATIONS

[Edit PO](#)

[Review Lines](#)

[Review / Edit Approvers](#)

**PO/CO for Supervisor Action**

**Purchase Order 0001056490: Pending** [View/Hide Comments](#) [Start New Path](#)

Buyer Supervisor for ChngOrd

**Pending**

McCracken, Stacy (VDOT)  
Buyer's Supervisor

[Comment History](#)

[Return to Purchase Order](#) [Approval History](#)

**Justification:**

Inserted Line 2 "TASK ORDER # 1" for Bristol project. Value or TO is \$61,072

**47** The **View Approval** page is shown and the **Justification** comment is displayed.

**48** The PO will continue on through normal PO processing. Once the Purchase Order is dispatched, the PO is complete and ready to accept vouchers.