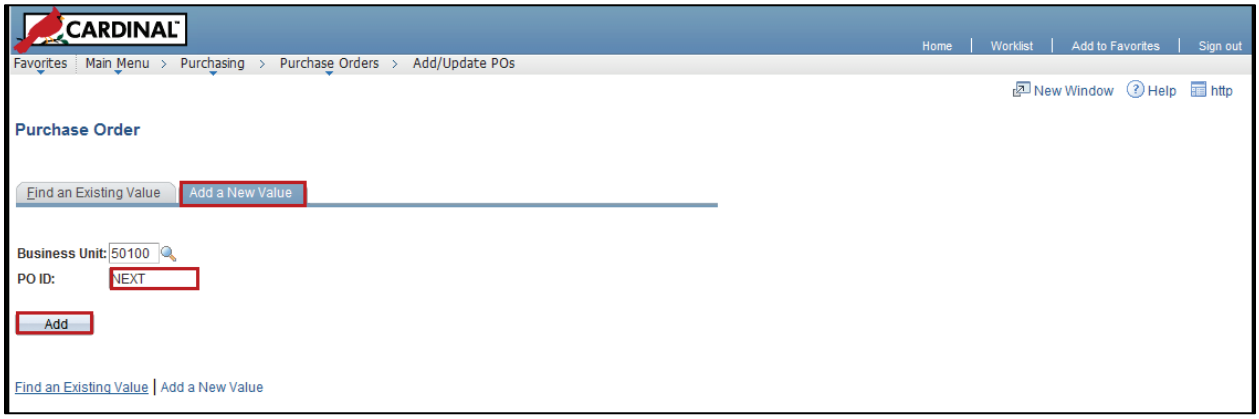
About Purchase Orders:

Cardinal tracks VDOT vendor payments for goods and services against a Purchase Order. You can create Purchase Orders from a: Strategic Sourcing Event; Contract; Requisition; or Ad-Hoc. Cardinal sends Purchase Orders electronically to eVA. eVA sends a confirming order to the vendor.

Purchase Order (All Items) From Contract	Pages 2 - 10
Purchase Order (1 Item) From Contract	Pages 11 - 16
Purchase Order (Ad-Hoc)	Pages 17 - 23
Change Orders	Pages 24 - 28
Reconcile/Close Out PO	Pages 29 - 36
Helpful Hints	Pages 37 - 43

CREATING A NEW PURCHASE ORDER:

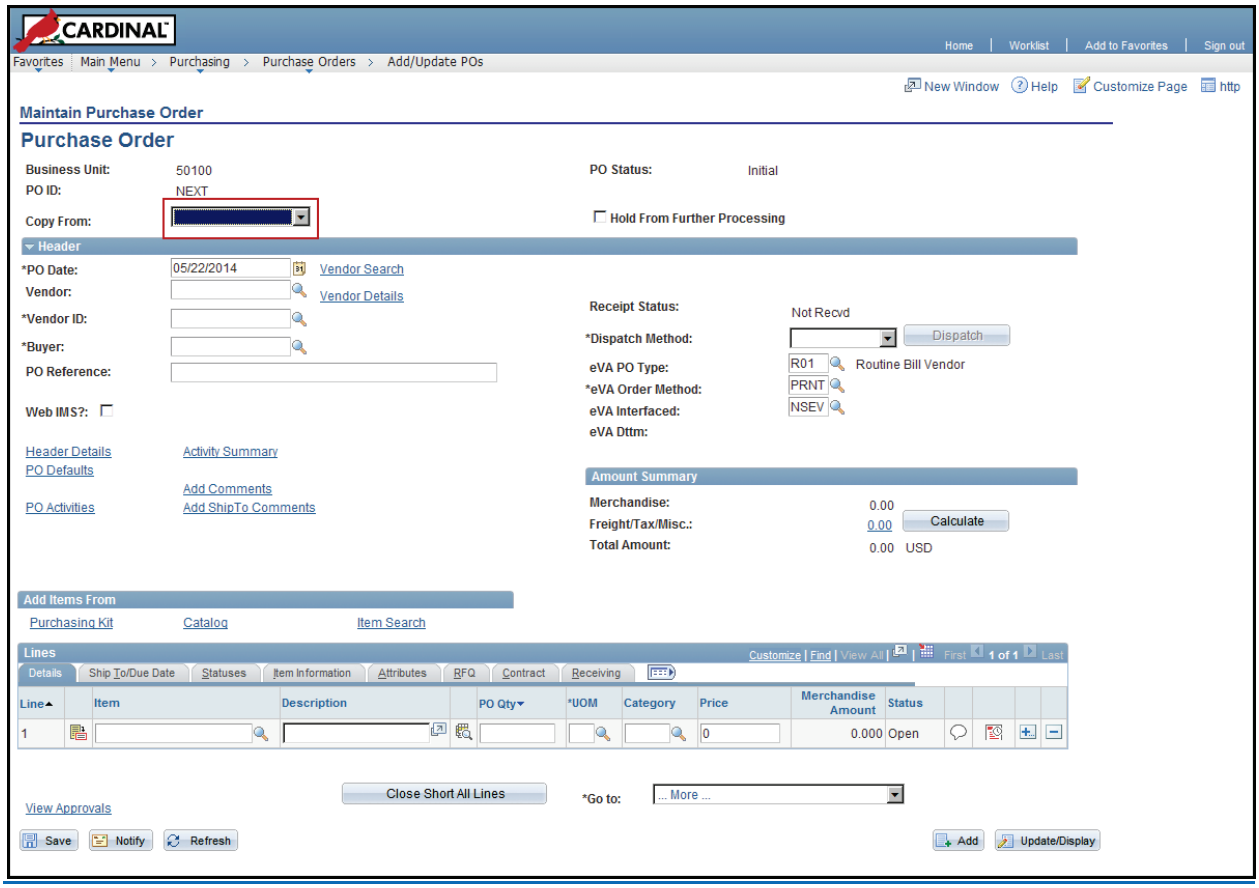


1 Navigate: **Main Menu > Purchasing > Purchase Orders > Add/Update POs**

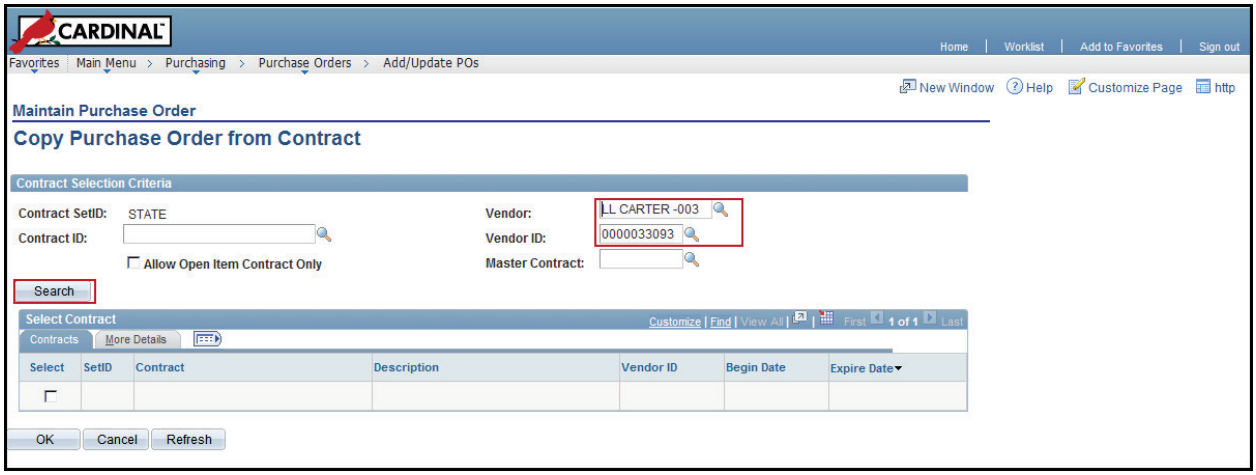
2 Select **Add a New Value** tab. **Business Unit = 50100**, **PO ID = NEXT** (**Do Not Change**) Cardinal assigns a **PO ID** number when you successfully save the PO.

3 Click **Add** button.

Purchase Order (All Items) from Contract



4 Click the **Copy From** and select **Contract**.



5 Enter the **Vendor** or **Vendor ID**. You can use the magnifying glass icons if you need to search.

6 Click on **Search** button.

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window | Help | Customize Page | http

Maintain Purchase Order

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID: STATE
Contract ID:
Allow Open Item Contract Only
Vendor: LL CARTER -003
Vendor ID: 0000033093
Master Contract:

Search

Select Contract — Customize | Find | View All | First 1-10 of 70 Last

Contracts | More Details

Select	SetID	Contract	Description	Vendor ID	Begin Date	Expire Date
☐	STATE	0000000000000000000041916	Snow Removal Services	0000033093	08/22/2013	07/01/2017
☑	STATE	0000000000000000000042566	Stone	0000033093	04/19/2014	04/18/2015
☐	STATE	0000000000000000000042110	Stone	0000033093	10/28/2013	10/27/2014
☐	STATE	0000000000000000000042563	Stone	0000033093	04/09/2014	10/08/2014
☐	STATE	0000000000000000000041951	Sand - Fredericksburg District	0000033093	08/30/2013	08/31/2014
☐	STATE	0000000000000000000041945	NOVA Sand	0000033093	08/29/2013	08/31/2014
☐	STATE	0000000000000000000042392	Stone	0000033093	02/21/2014	08/20/2014
☐	STATE	0000000000000000000041816	Stone	0000033093	07/19/2013	07/18/2014
☐	STATE	0000000000000000000041826	Stone	0000033093	08/01/2013	07/14/2014
☐	STATE	0000000000000000000041808	Stone	0000033093	07/15/2013	07/14/2014

OK | Cancel | Refresh

7 All Contracts (related to the selected vendor) are displayed.

8 **Select** the desired **Contract** and Click **OK.**

Purchase Order

Business Unit: 50100
PO ID: NEXT
Copy From:
PO Status: Open
Hold From Further Processing

Header

*PO Date: 05/22/2014 — Vendor Search
Vendor: LL CARTER -003 — Vendor Details
*Vendor ID: 0000033093 — LL Carter & Son Inc
*Buyer: CAROLINE.HUDGIN — Hudgins, Caroline S. (VDOT)
PO Reference: Stone
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:

Header Details | Activity Summary
PO Defaults
Edit Comments
PO Activities | Add ShipTo Comments

Amount Summary

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

Add Items From

Purchasing Kit | Catalog | Item Search

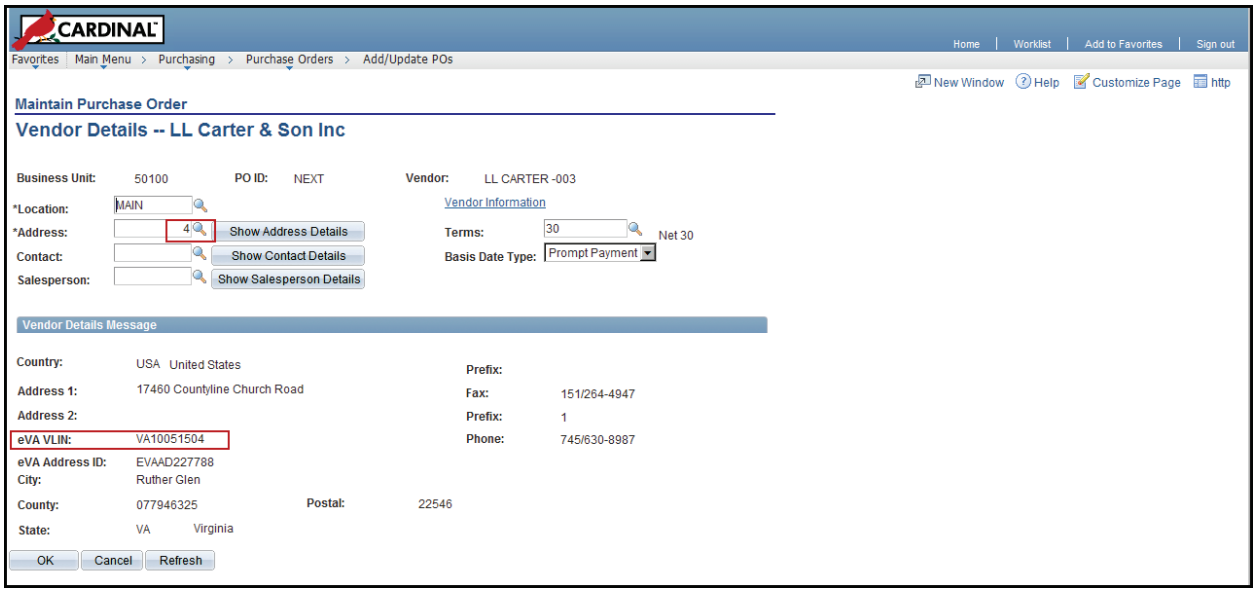
Lines — Customize | Find | View All | First 1-4 of 4 Last

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503518200	AGGREGATE BASE,		LTN	7503518	0	0.00	Open
2	7503532045	STONE NO. 8, STONE		LTN	7503532	0	0.00	Open
3	7503518200	AGGREGATE BASE,		LTN	7503518	0	0.00	Open
4	7503551310	STONE RIP RAP		LTN	7503551	0	0.00	Open

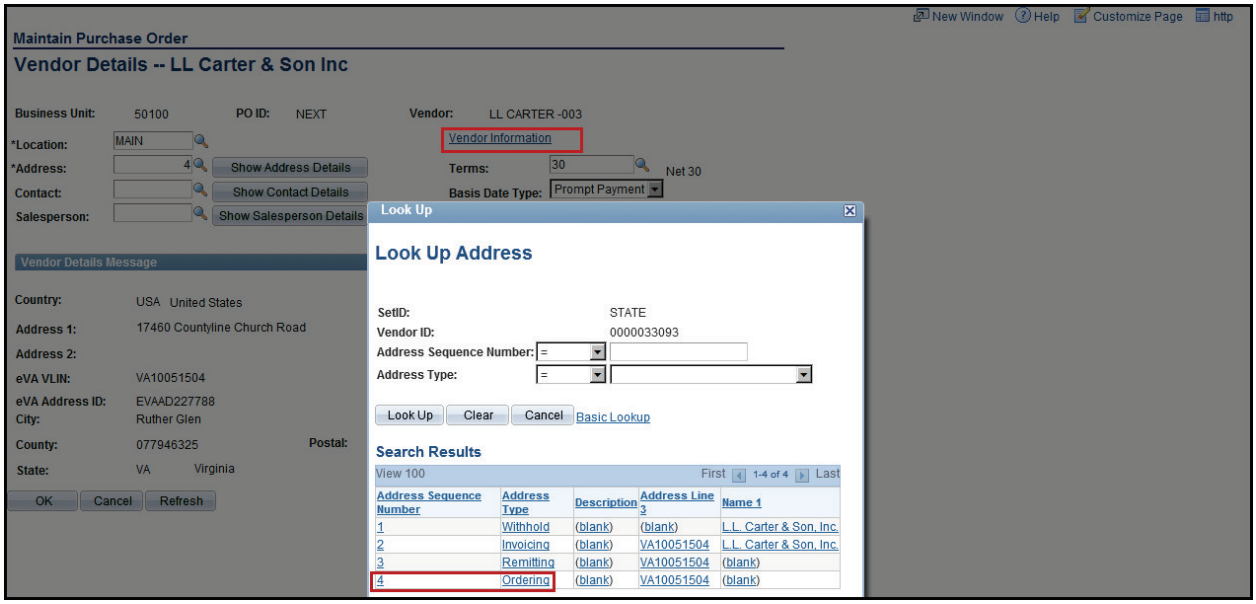
9 All contract line items populate the PO as shown.

10 Click on **Vendor Details** hyperlink to verify Vendor Address for ordering.



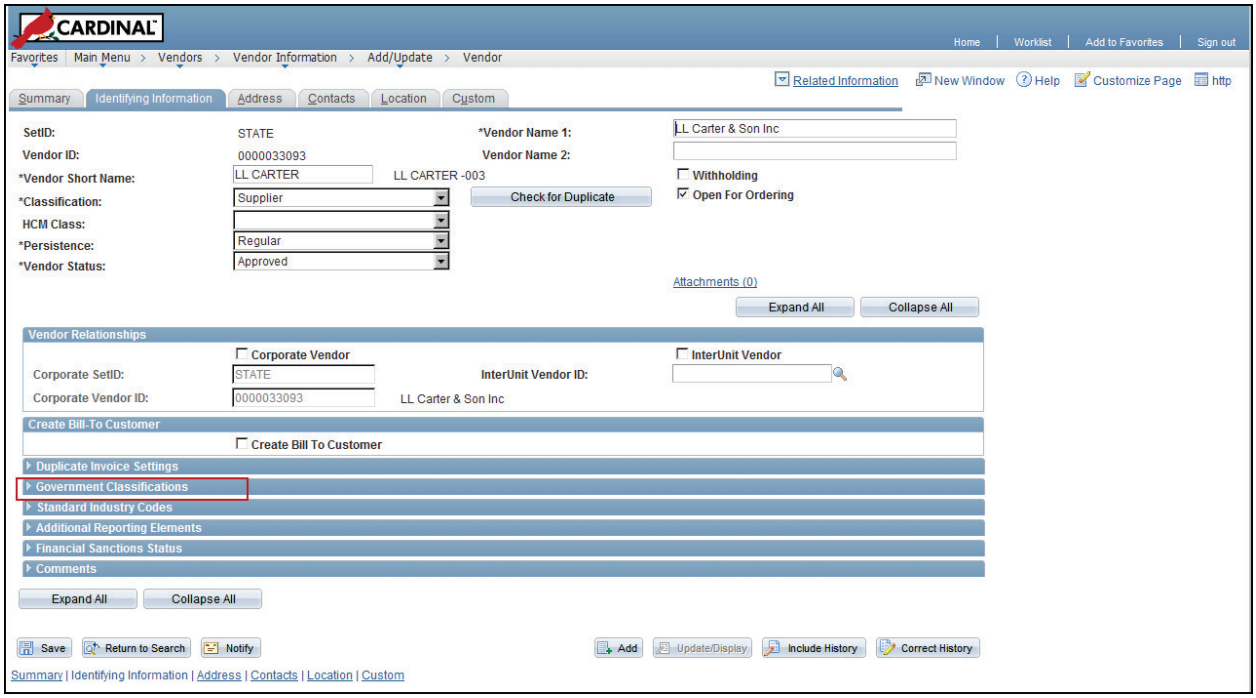
11 Default Ordering address is displayed and shows eVA Vendor Location ID # (known as **VLIN**).

12 To change (if necessary), click on **Address** lookup icon.



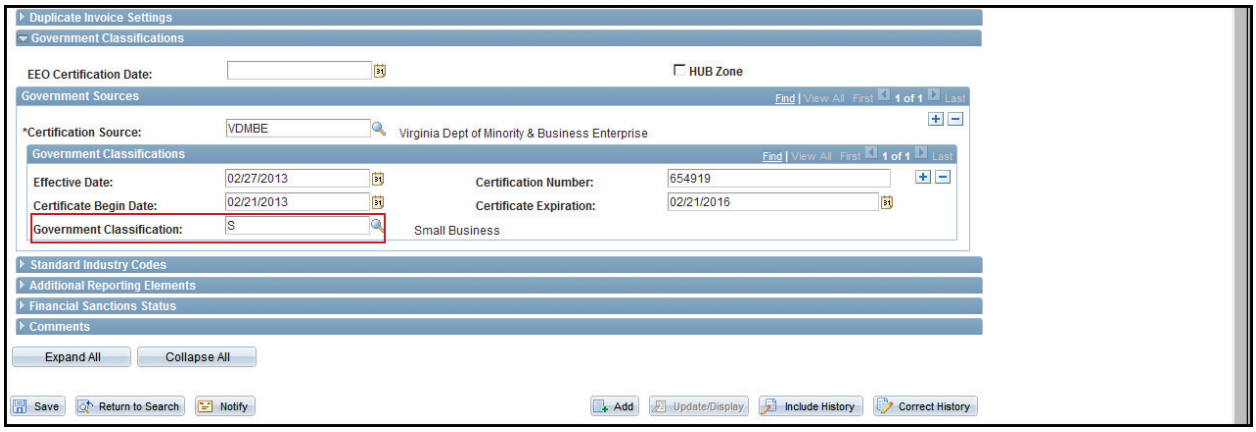
13 Select the **Address Sequence Number** desired.

14 For additional vendor details, click on **Vendor Information** hyperlink.



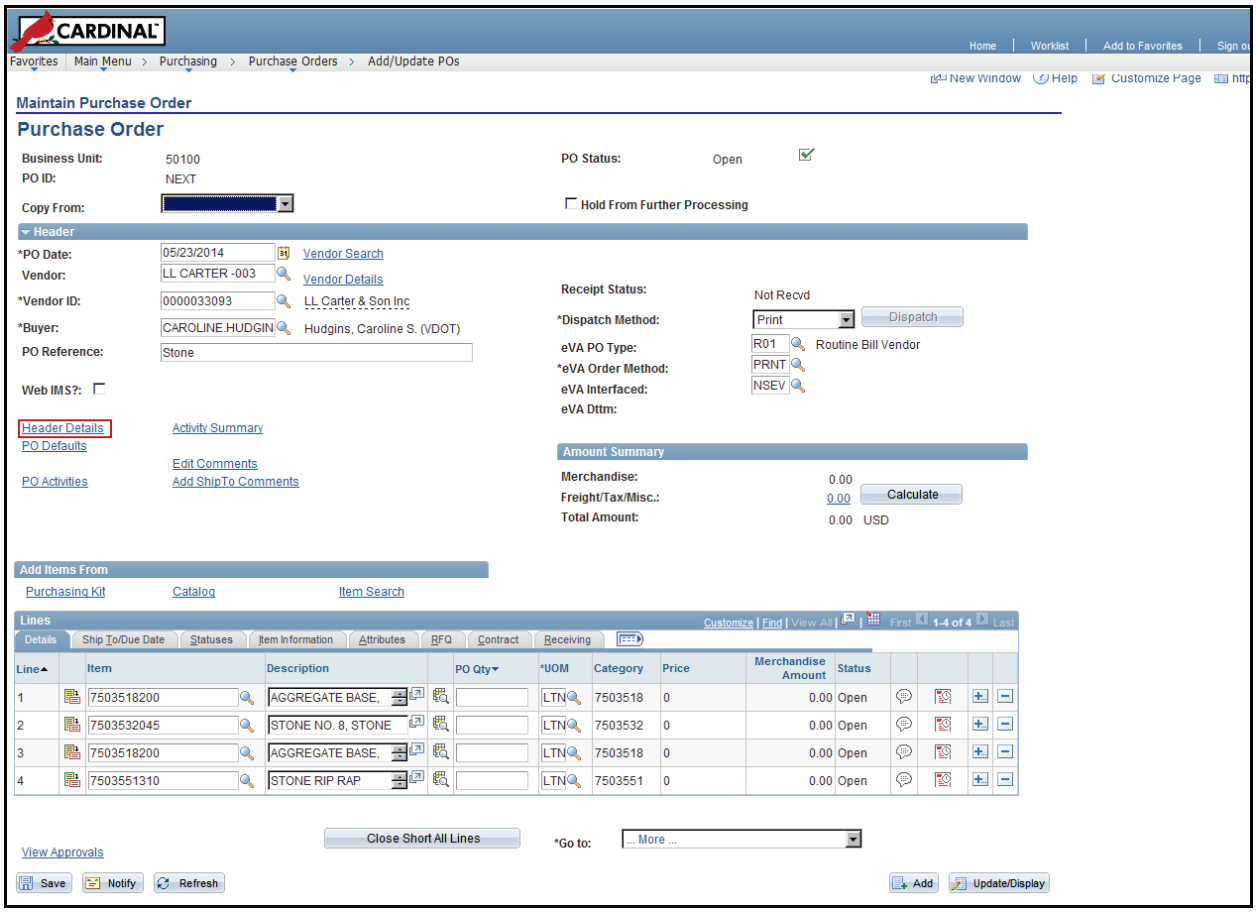
15 A new window opens on your browser. You may navigate back and forth between windows.

16 To view Vendor DMBE status, click (Expand) the **Government Classifications** line.

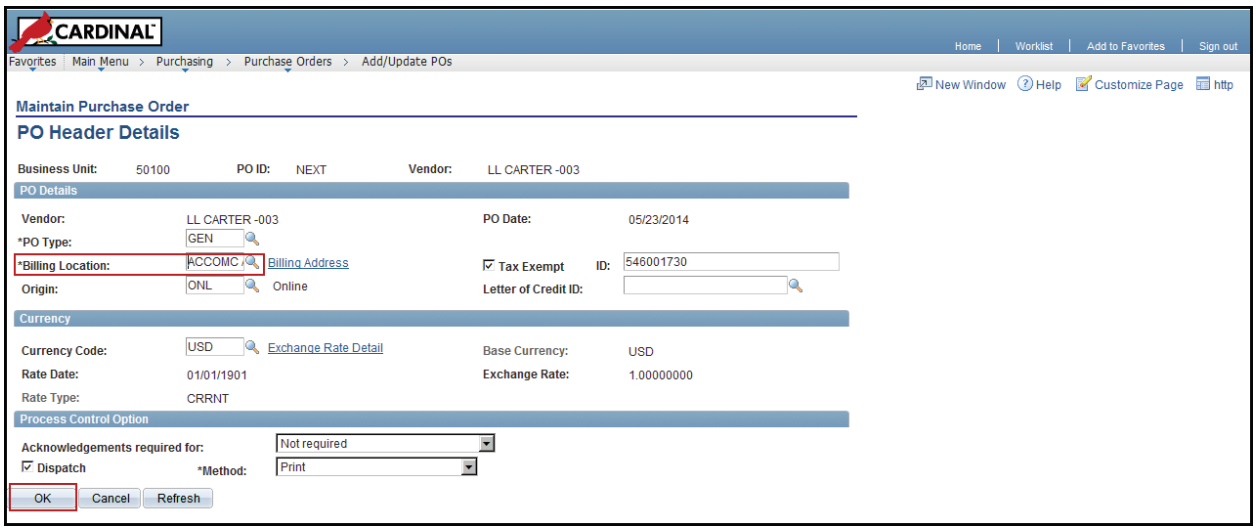


17 In this example, the vendor's **Government Classification** is shown to be **S** (Small Business).

18 Click/Return to the **Add/Update POs** window.

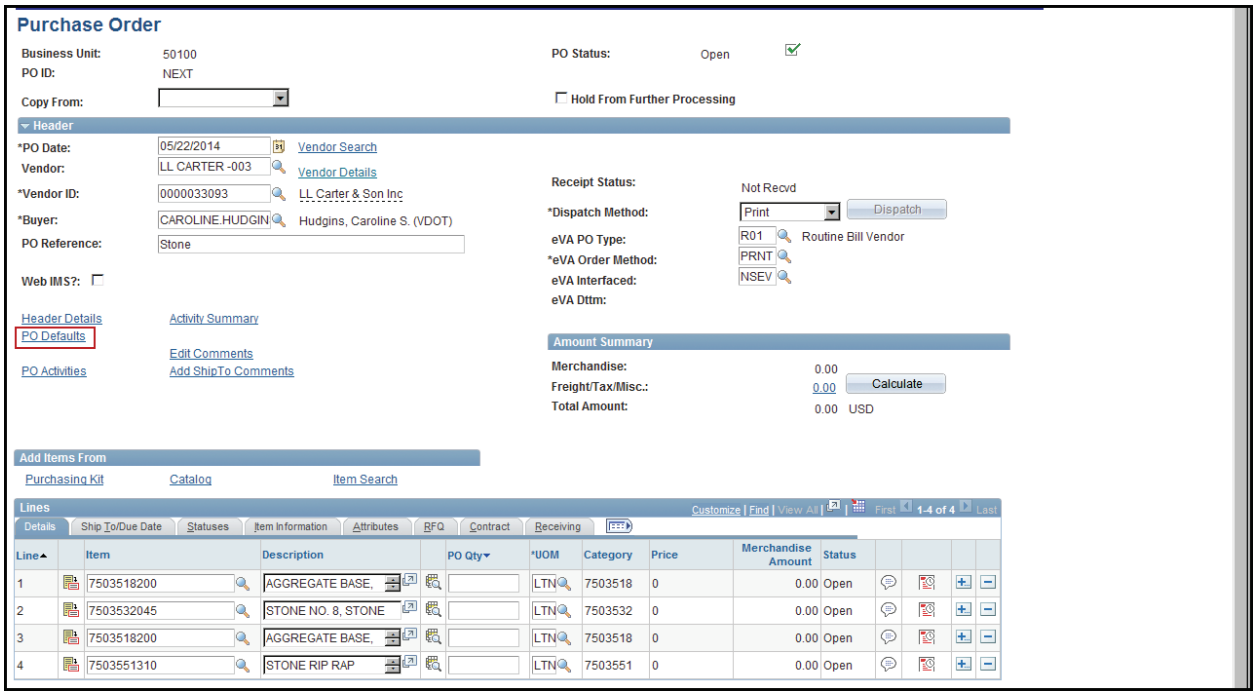


19 Click on **Header Details** hyperlink.

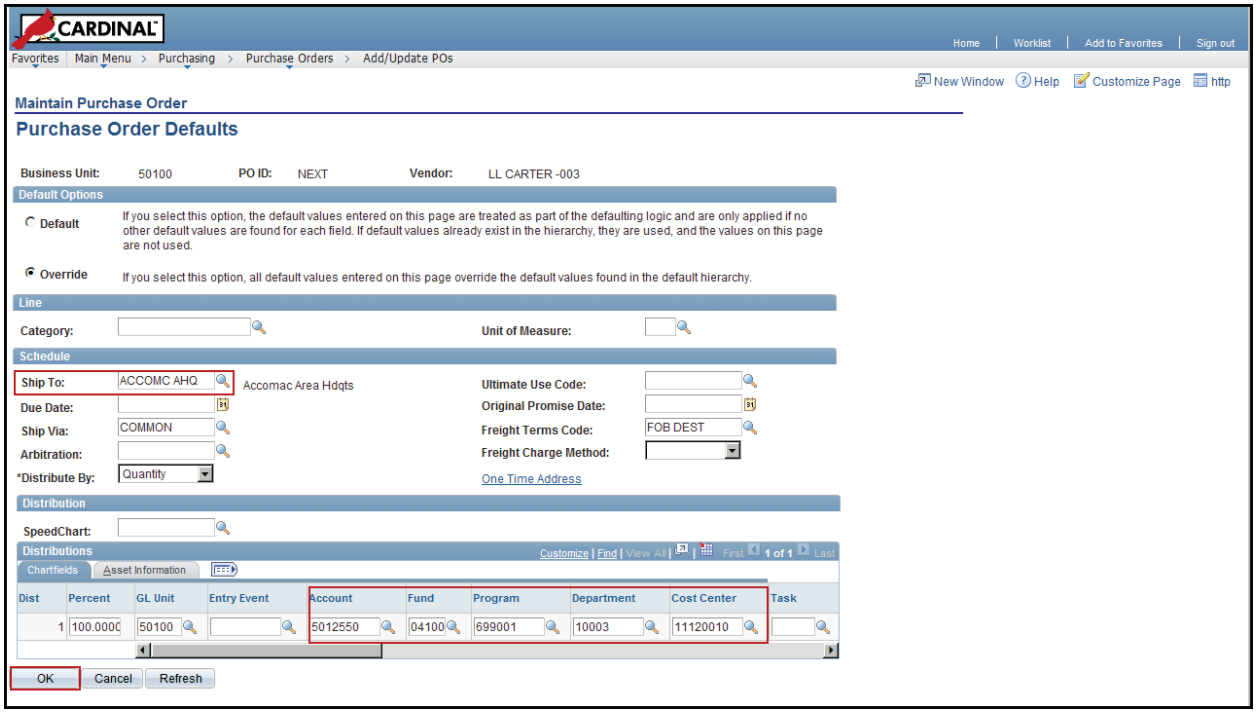


20 Click the lookup icon and select the **Location Code** for your **Billing Location**.

21 Click **OK.**



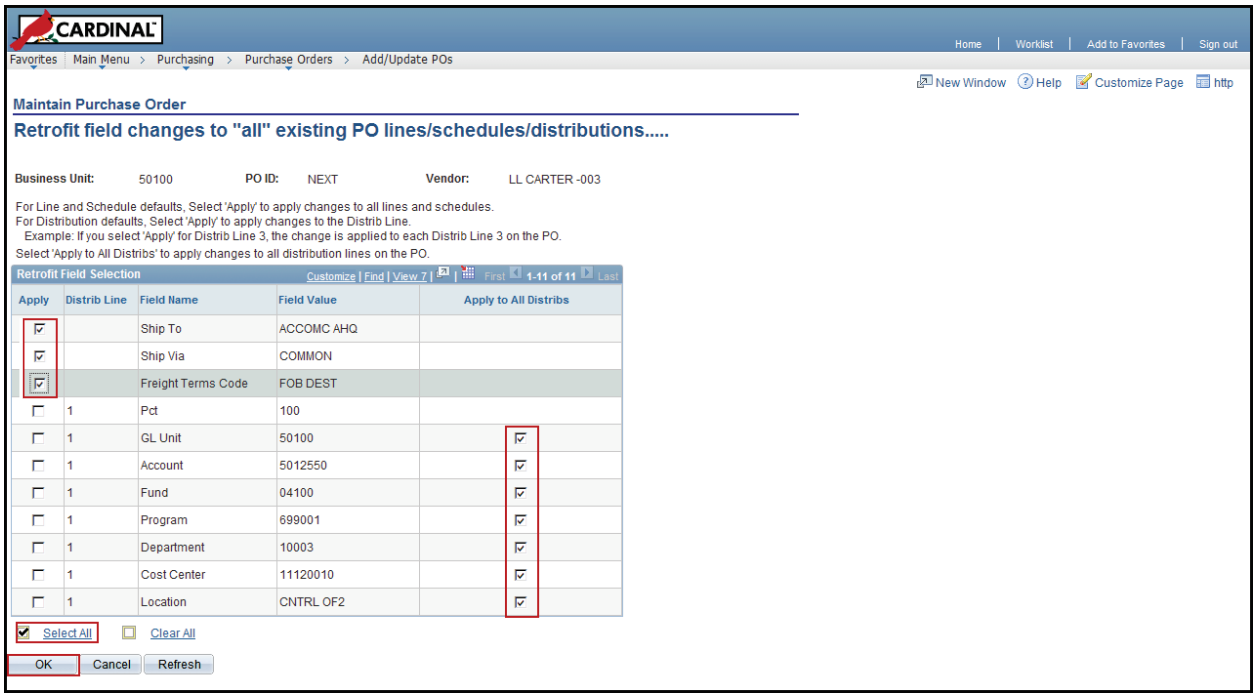
22 Click on **PO Defaults** hyperlink.



23 Enter the required **Ship To** location.

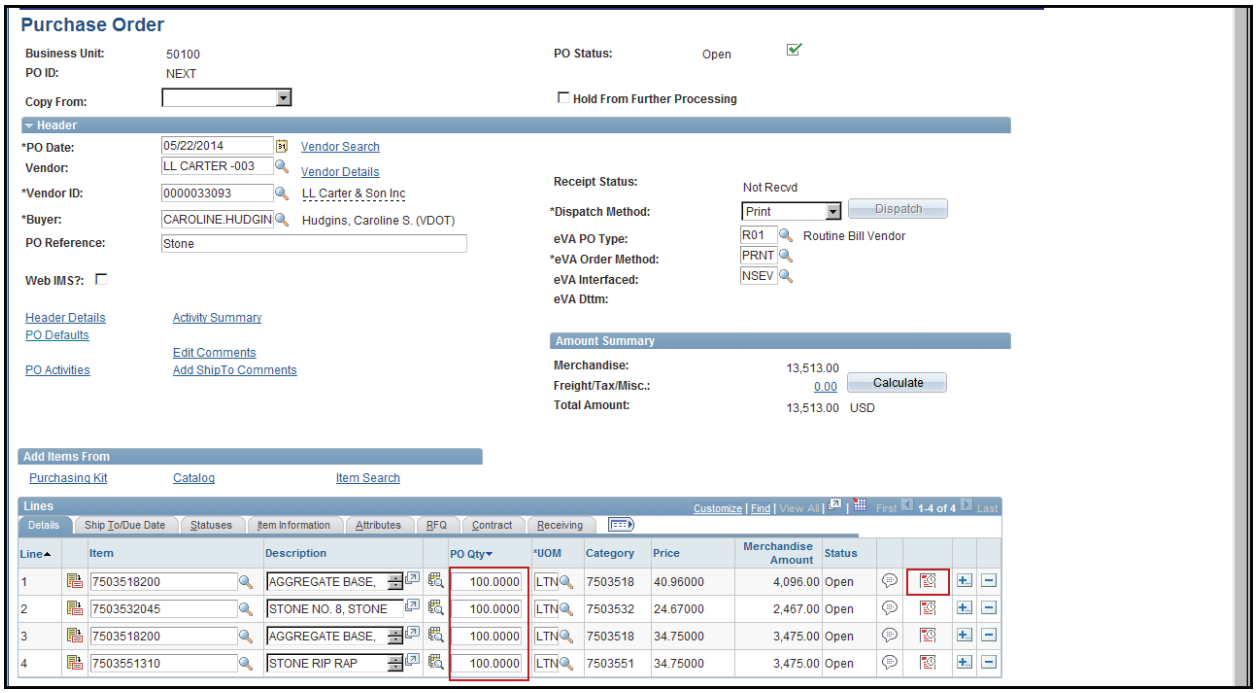
24 Enter your accounting distribution.

25 Click **OK**.



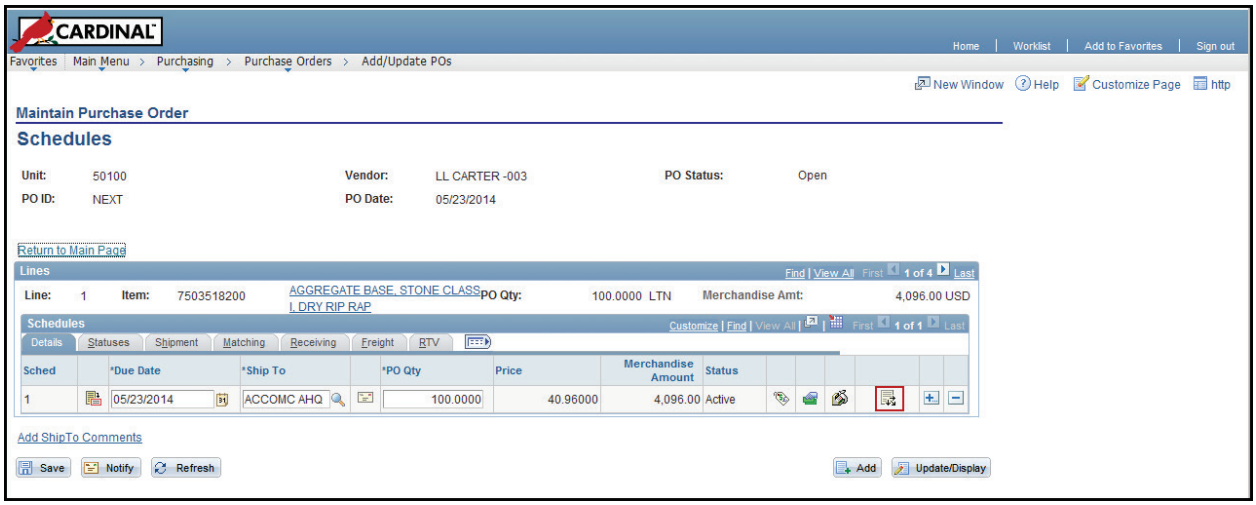
26 Click on **Select All** to checkbox all identified distribution values, or checkbox as shown.

27 Click **OK.**

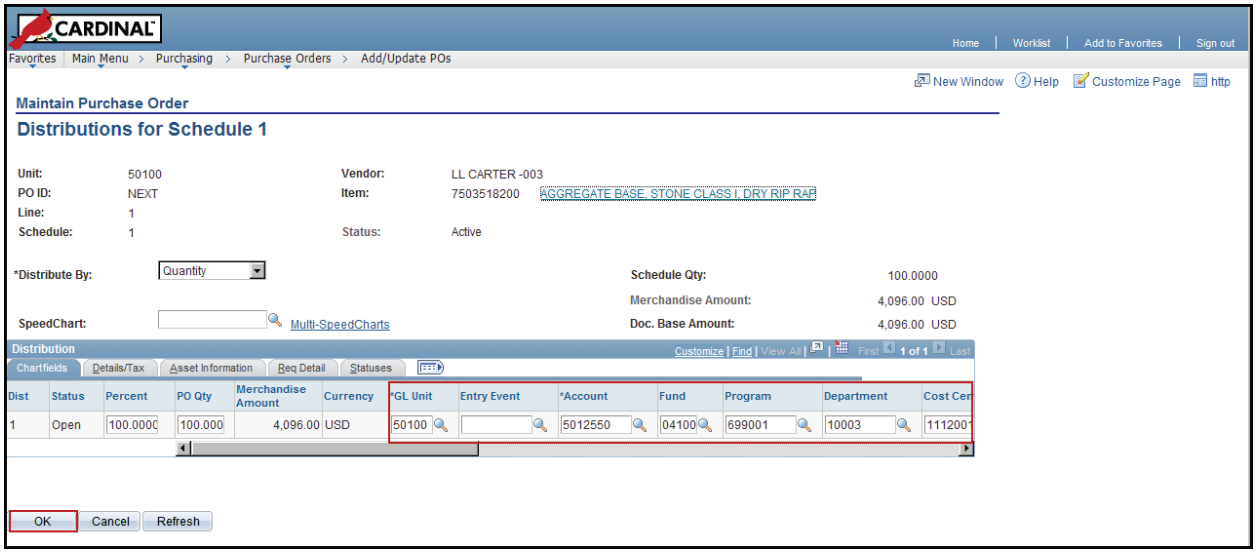


28 Enter PO line quantities.

29 If you are using different account distributions, click on the **Schedule** icon.

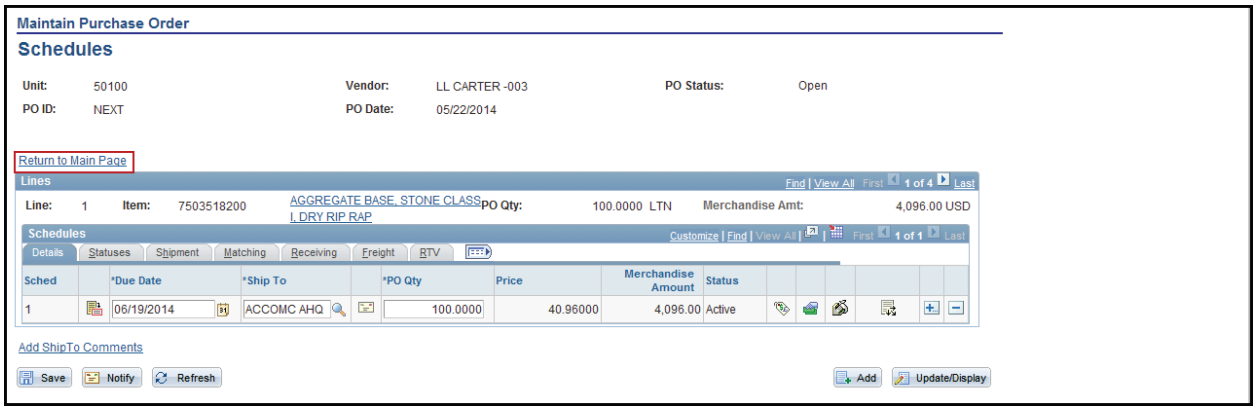


30 Click on the **Distribution** icon.

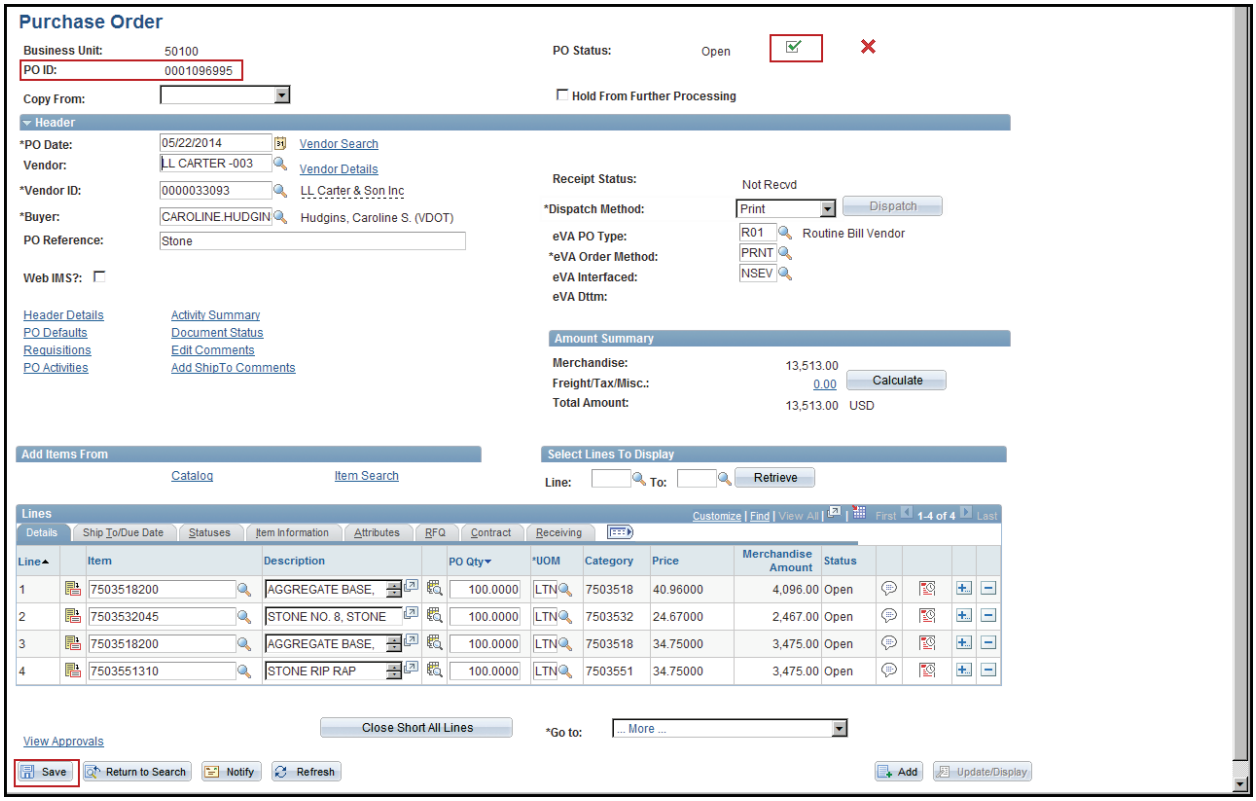


31 Verify or update the accounting distribution.

32 Click **OK.**

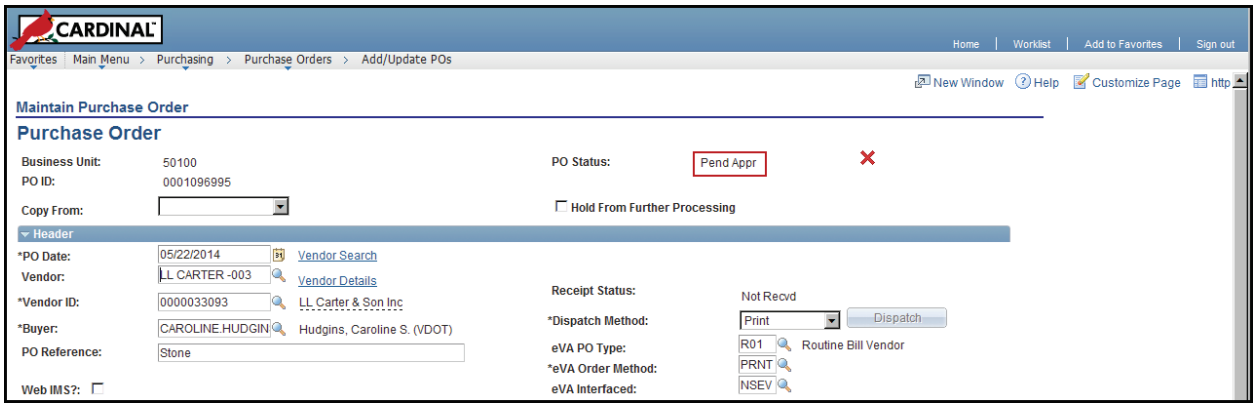


33 Click **Return to Main Page** hyperlink.



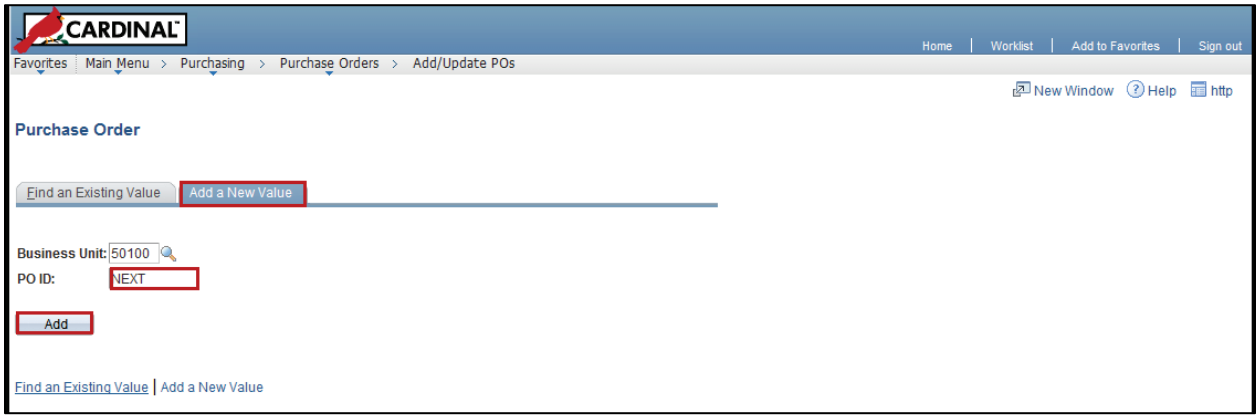
34 Click **Save**. Cardinal assigns the **PO ID #** when you successfully save the **PO**.

35 Click the **PO Status** checkbox.



36 **PO Status** changes to **Pending Approval** and routes to your Supervisor's **Worklist** for approval action.

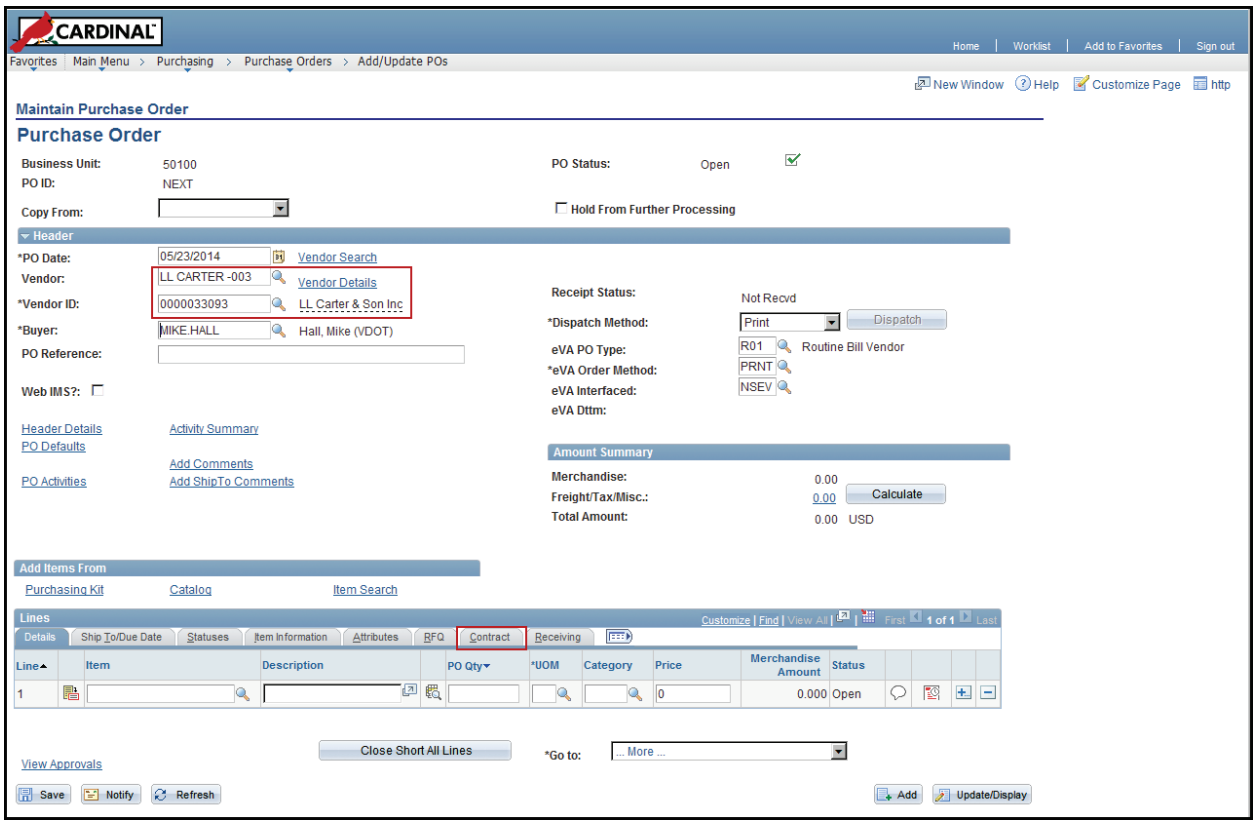
Purchase Order (1 Item) from Contract



1 Navigate: **Main Menu > Purchasing > Purchase Orders > Add/Update POs**

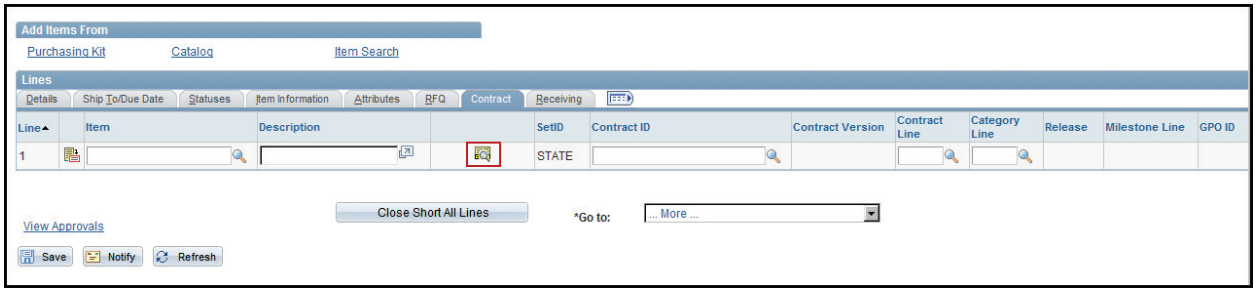
2 Select **Add a New Value** tab. **Business Unit = 50100**, **PO ID = NEXT** (**Do Not Change**) Cardinal assigns a **PO ID** number when you successfully save the PO.

3 Click **Add** button.

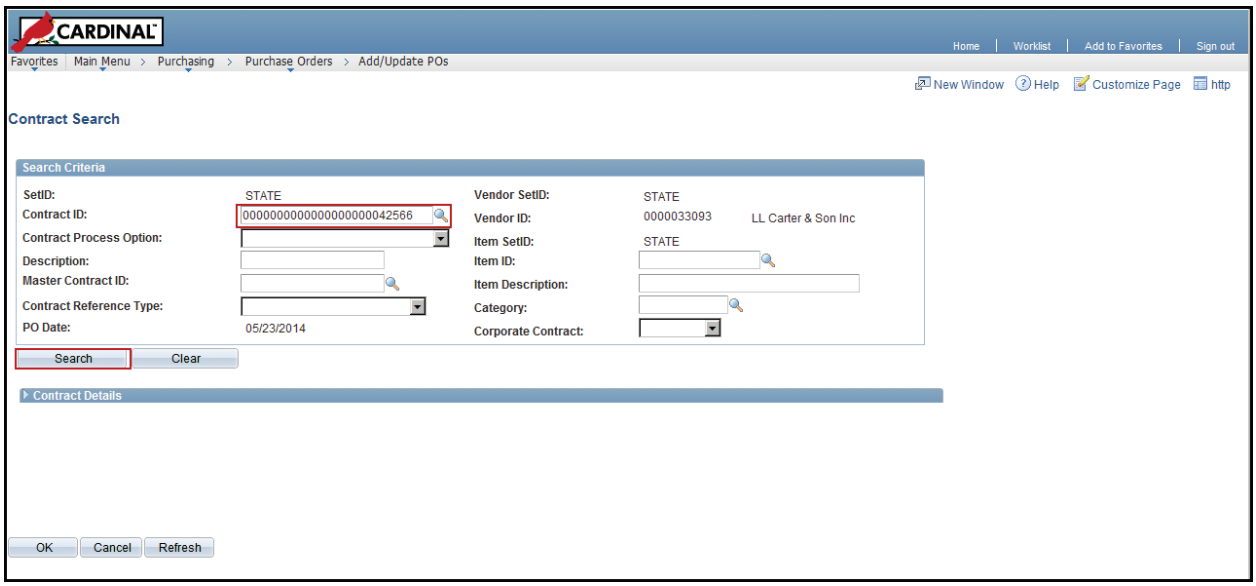


4 Enter Vendor information.

5 Click on **Contract** tab.

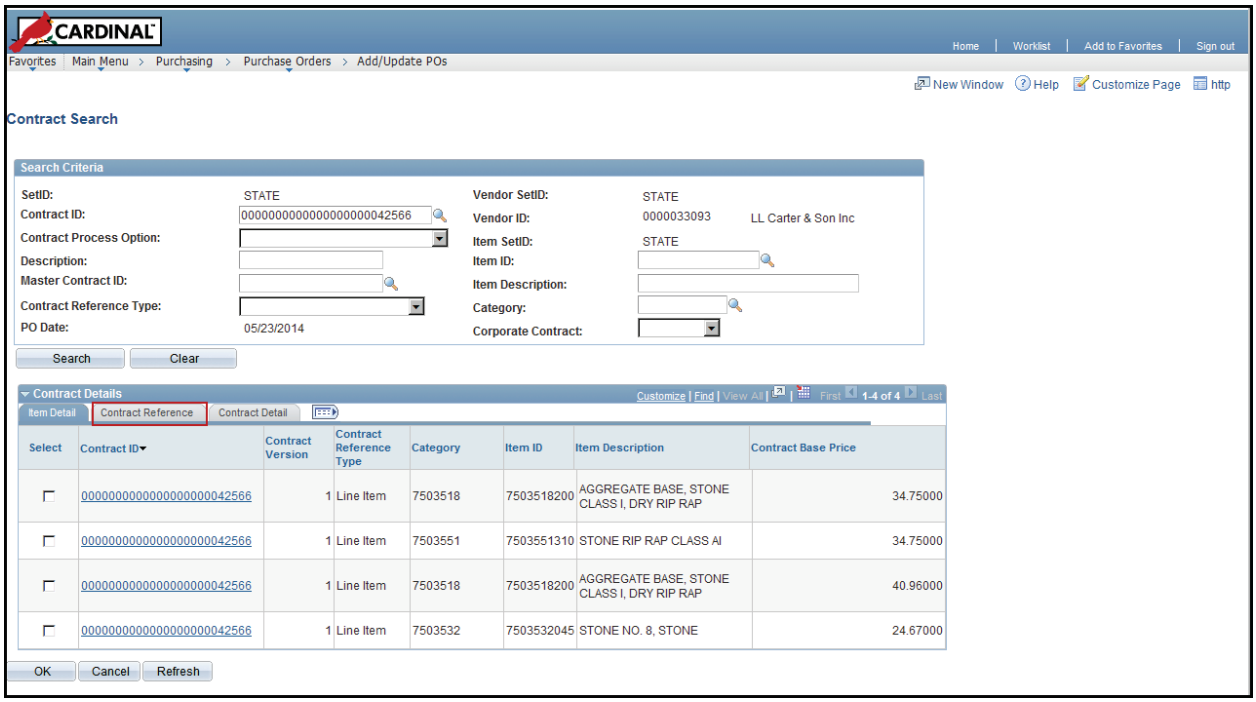


6 Click on **Contract Search** icon.



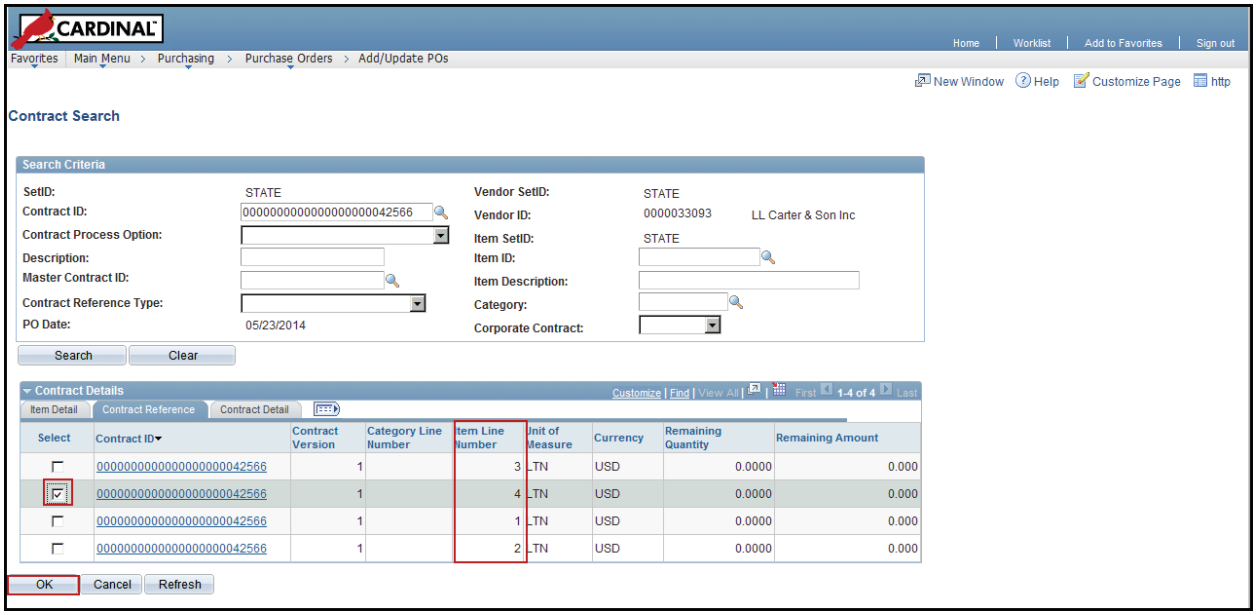
7 Enter a specific **Contract ID #**, or use Lookup icon if necessary. Only those contracts related to this vendor will be shown.

8 Click the **Search** button.



9 **Contract ID, Item Descriptions** and **Contract Base Prices** are displayed.

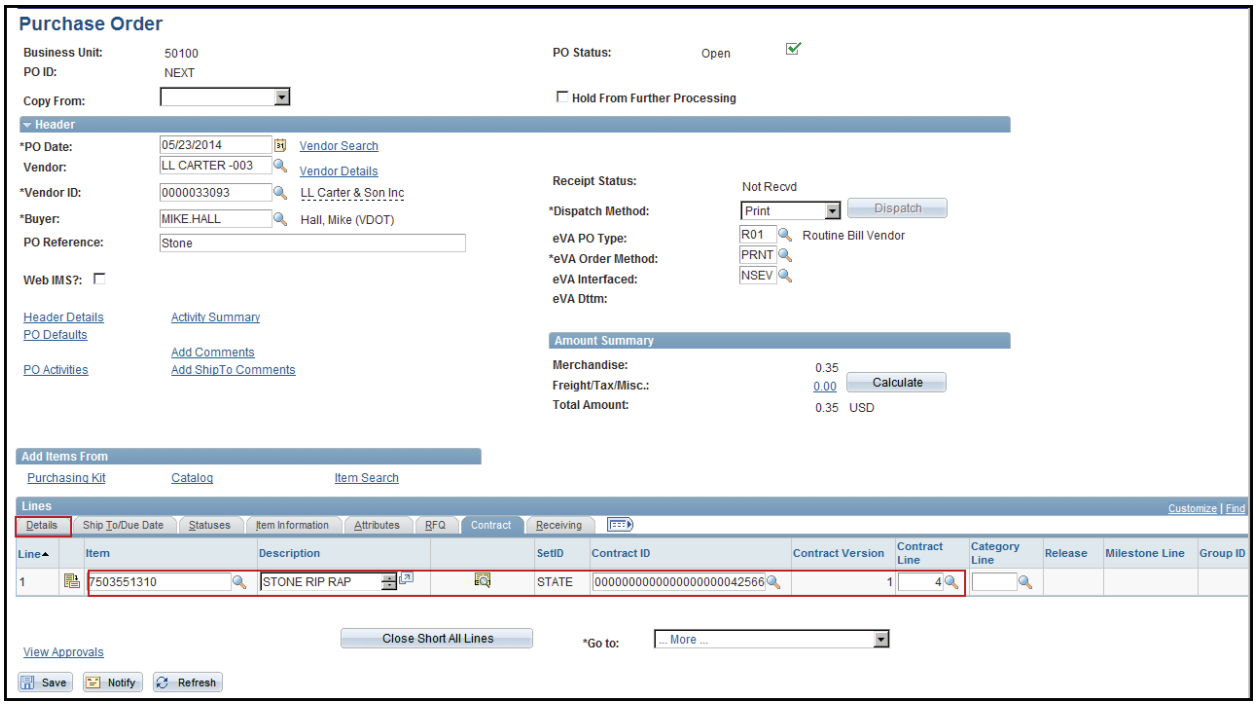
10 Click the **Contract Reference** tab.



11 Each unique contract **Item Line Number** is displayed.

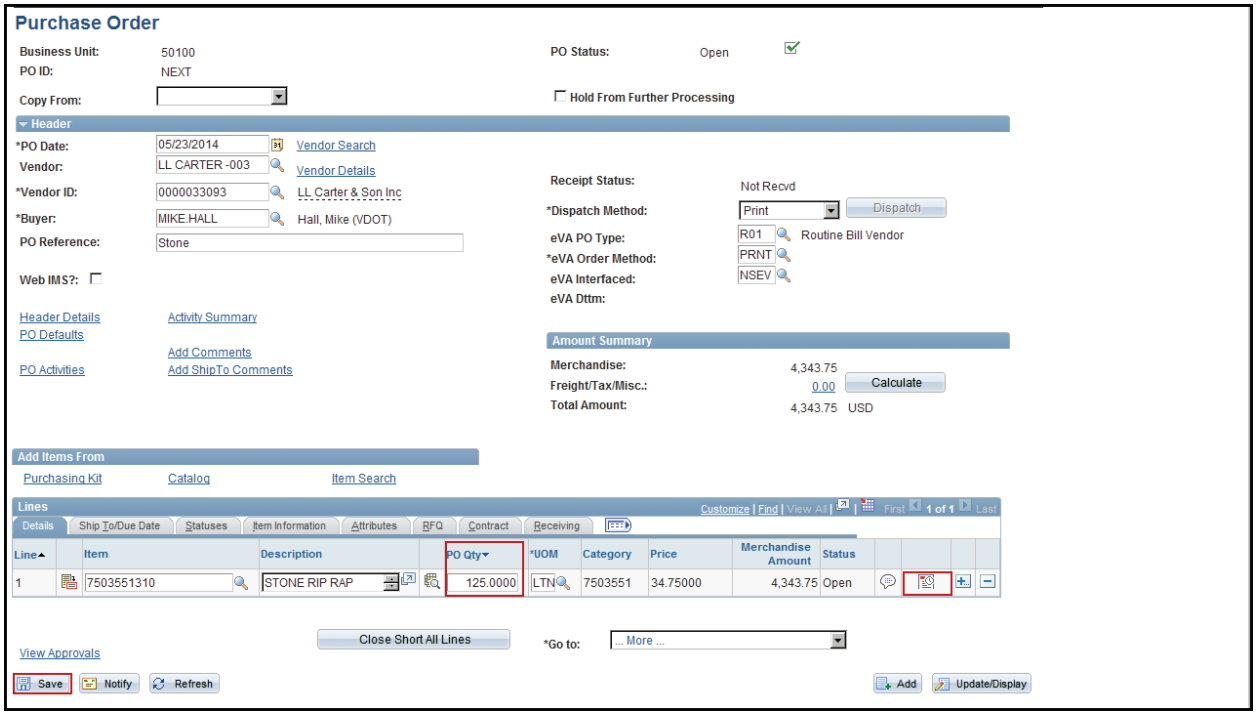
12 **Check / Select** desired line.

13 Click **OK.**



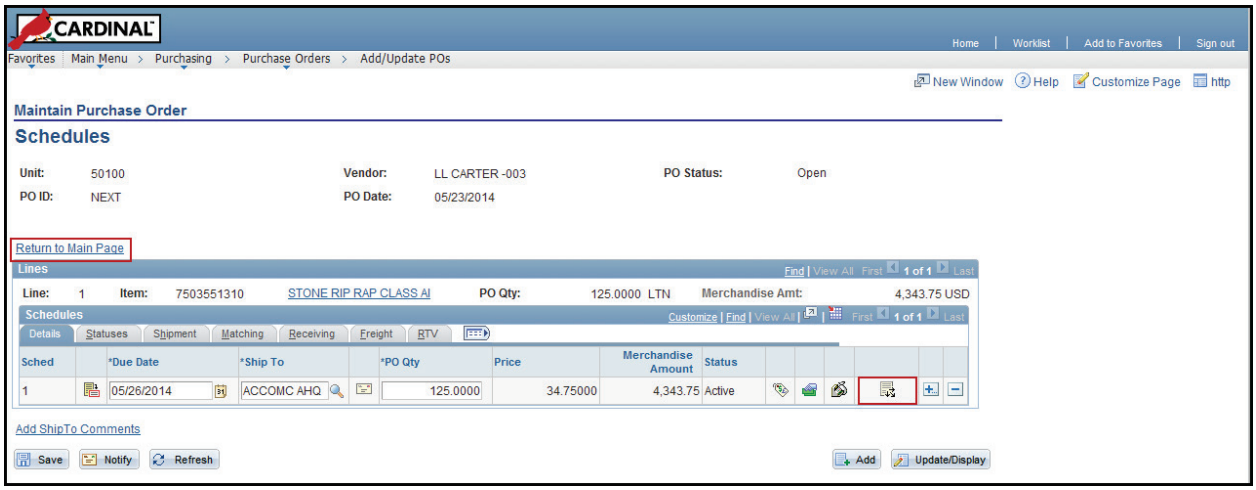
14 The **Line** you selected from the contract now populates your **PO**.

15 Click the **Details** tab.

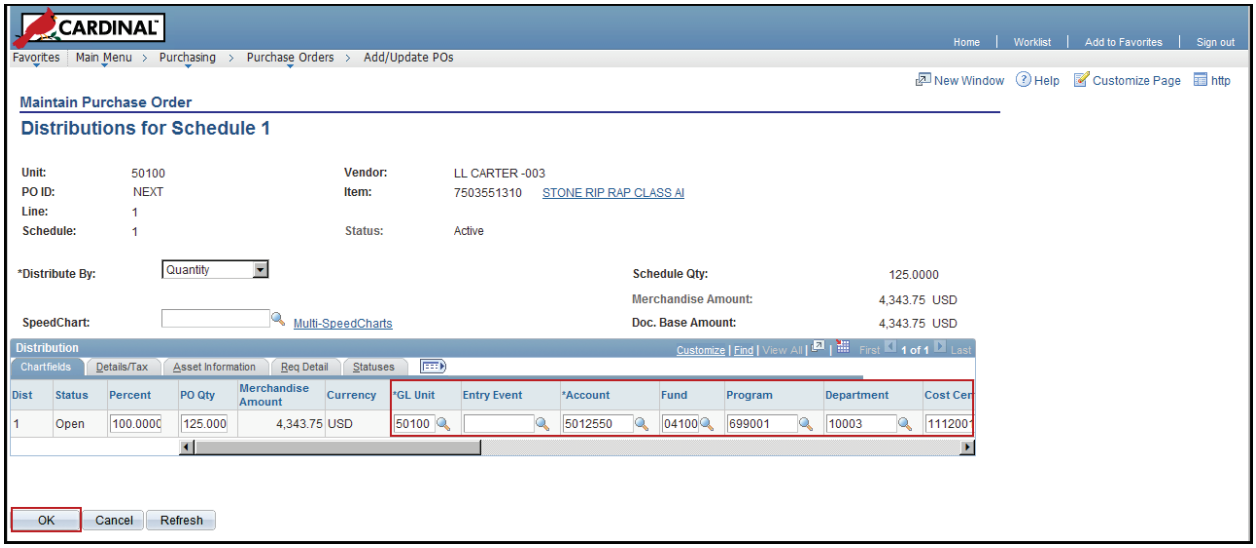


16 Enter **PO Qty**.

17 Click on the **Schedule** icon.

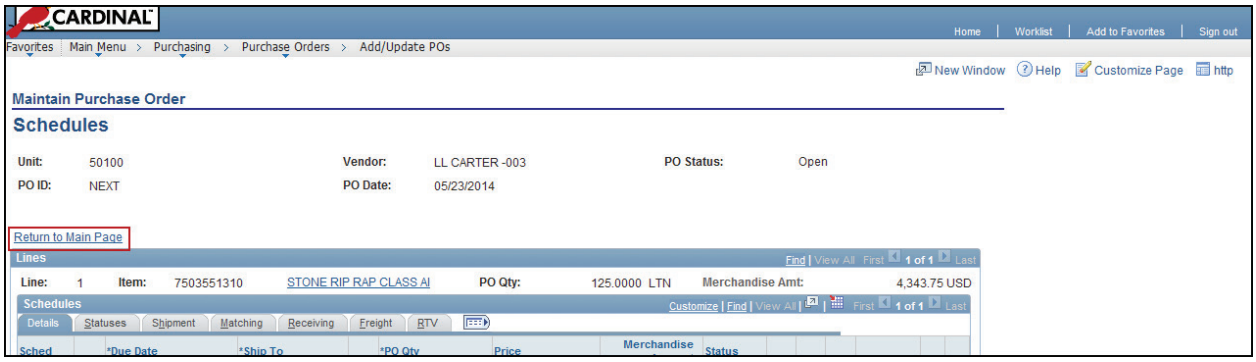


18 Click the **Distribution** icon.



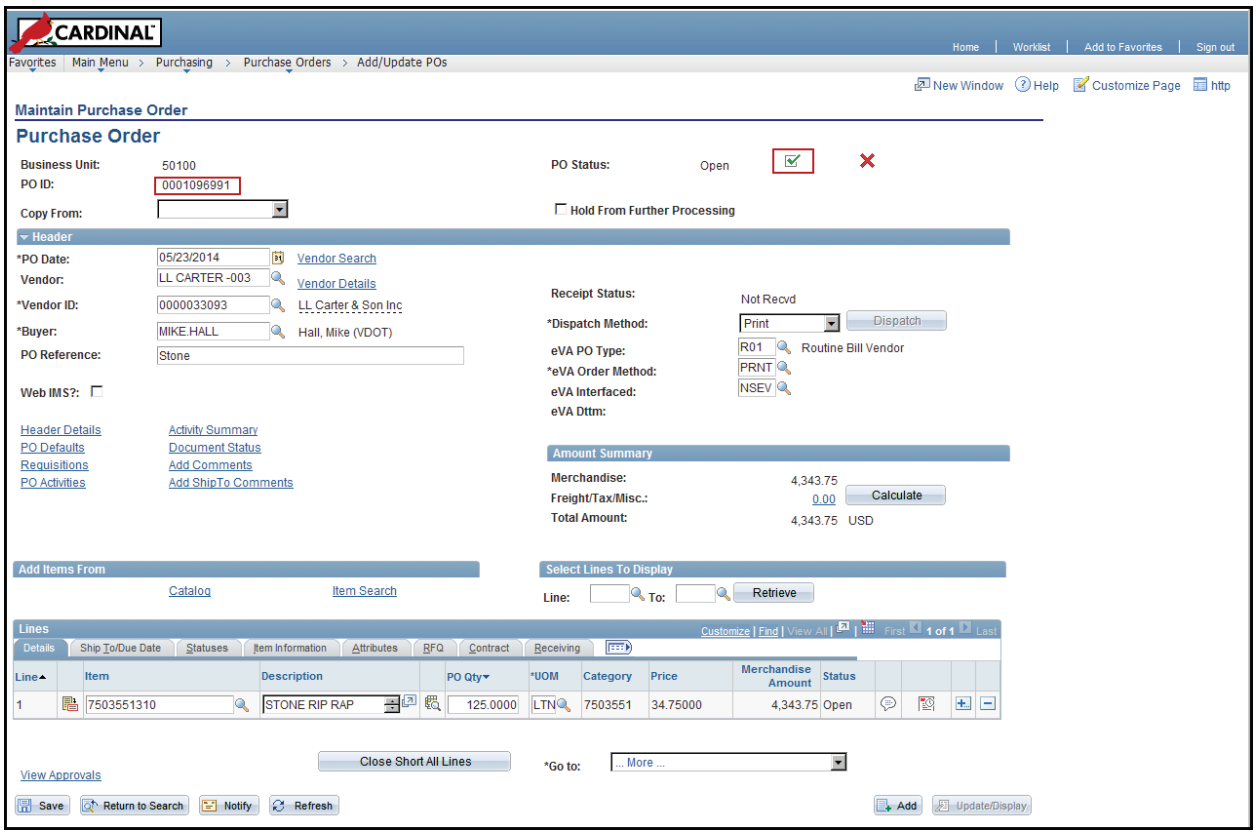
19 Enter distribution charges (as necessary).

20 Click **OK**.



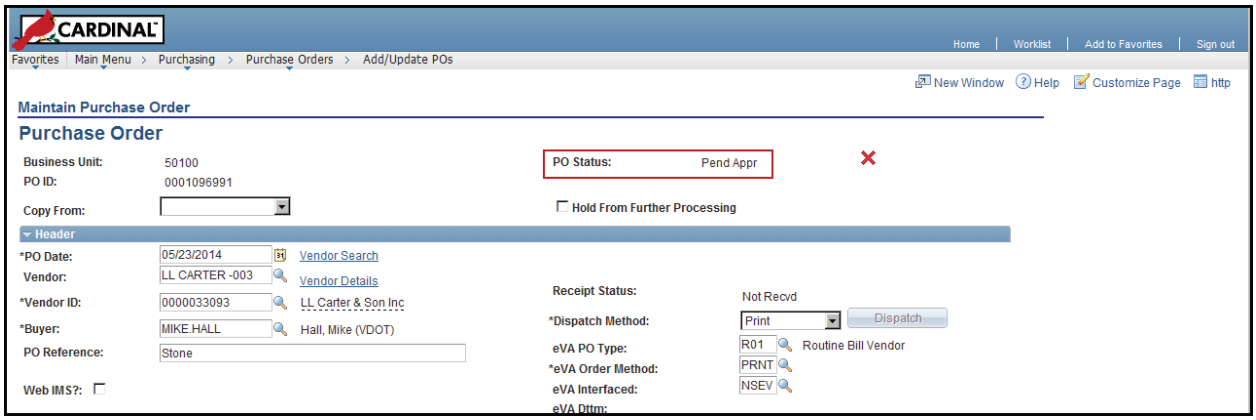
21 Click **Return to Main Page** hyperlink.

22 Click **Save.**



23 **PO ID #** is shown.

24 Click on **PO Status** checkbox.

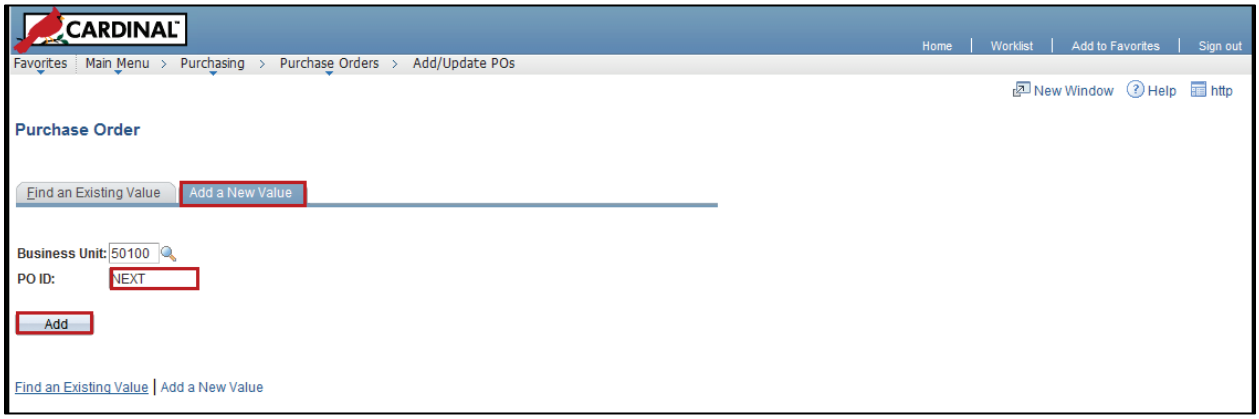


25 **PO Status** changes to Pending Approval.

26 PO routes to Supervisor's **Worklist** for approval.

Purchase Order (Ad-Hoc)

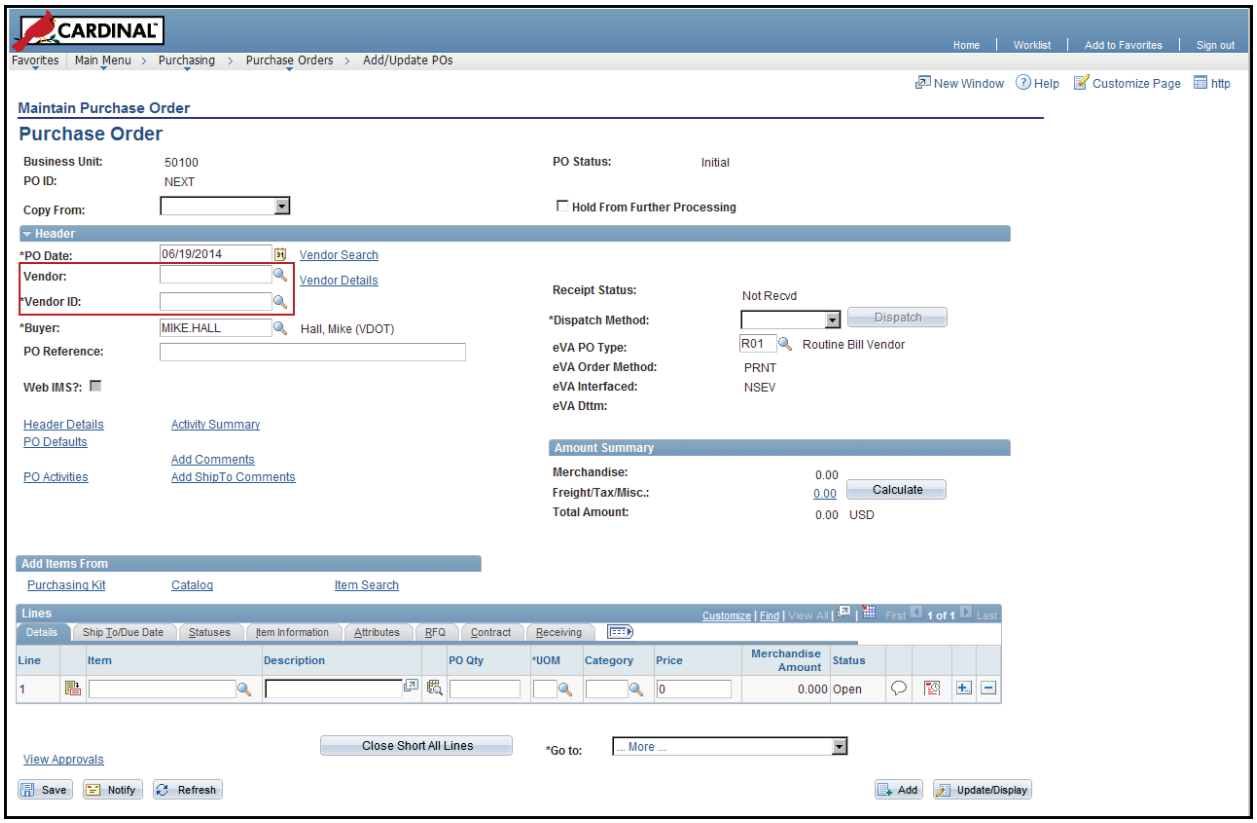
There are multiple ways to build a PO (ad-hoc). The following example provides a step by step means to generate a simple PO.



1 Navigate: **Main Menu > Purchasing > Purchase Orders > Add/Update POs**

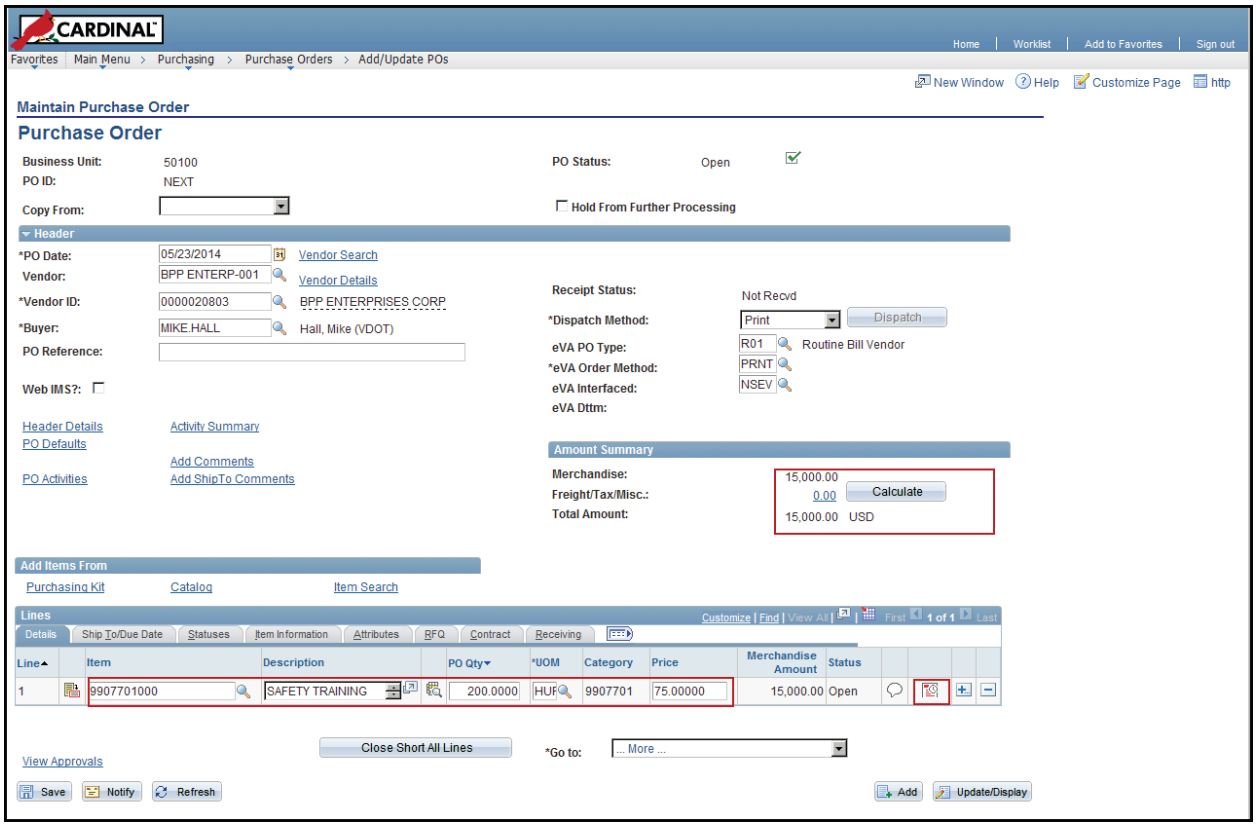
2 Select **Add a New Value** tab. **Business Unit = 50100**, **PO ID = NEXT** (**Do Not Change**) Cardinal assigns a **PO ID** number when you successfully save the PO.

3 Click **Add** button.



4 PO default information is displayed as shown.

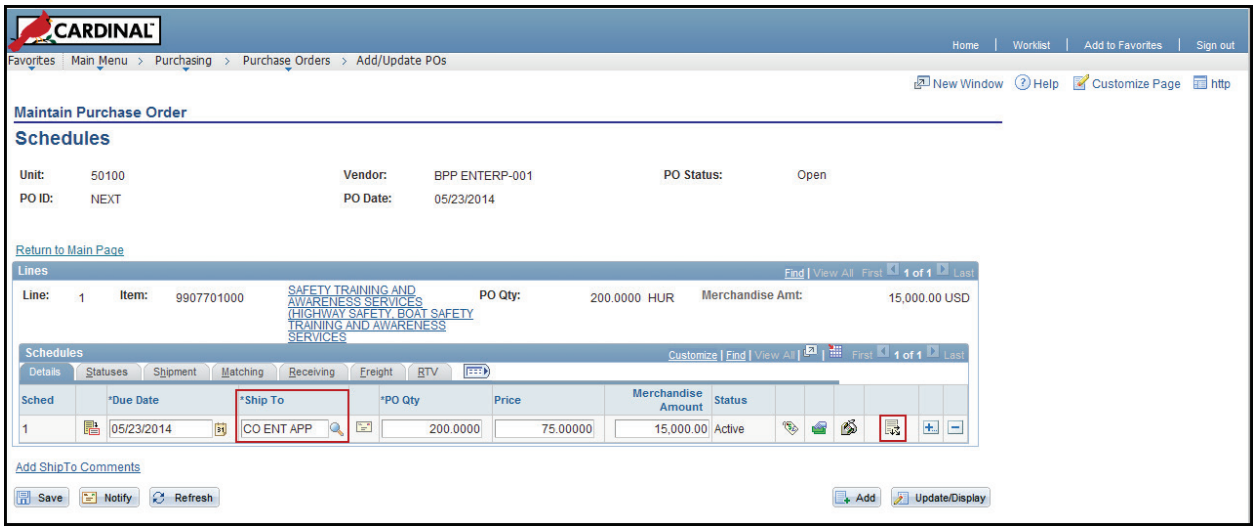
5 Enter **Vendor ID**. Use lookup icon if necessary.



6 Enter **Item ID**.

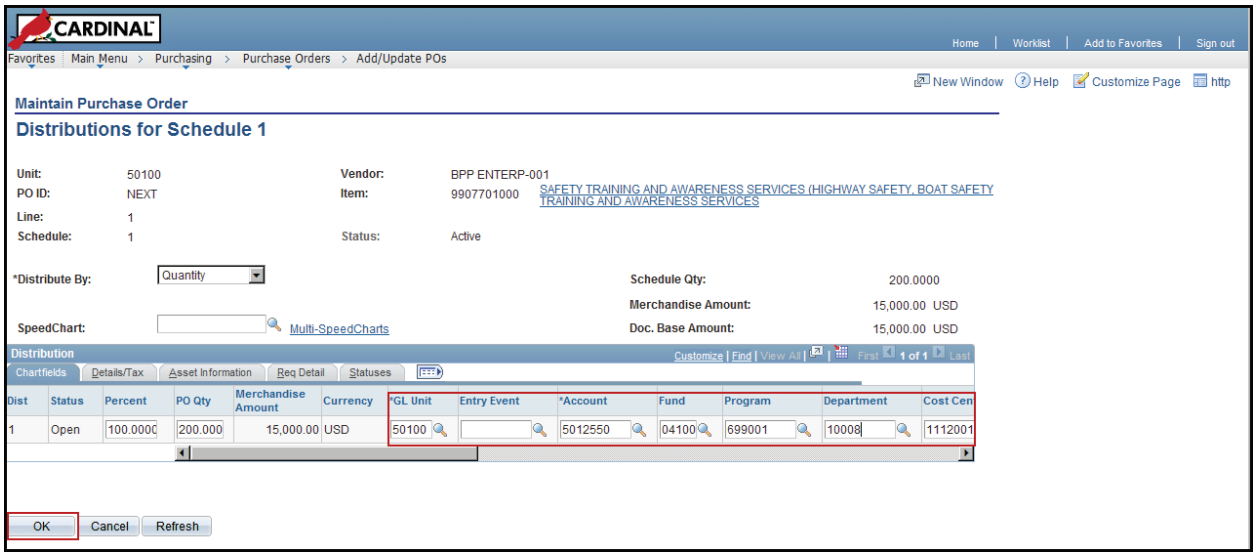
7 Enter **PO QTY** and **Price**. Cardinal calculates and displays the total **Merchandise Amount**.

8 Click on **Schedule** icon.



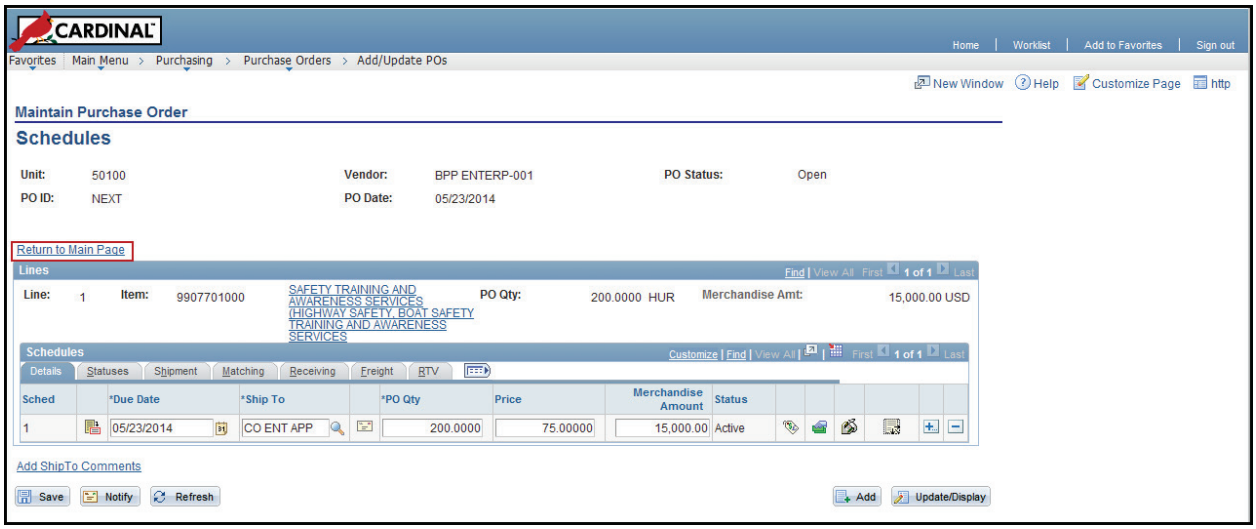
9 Enter/Update **Ship To** location as necessary.

10 Click on **Distribution/ChartFields** icon.

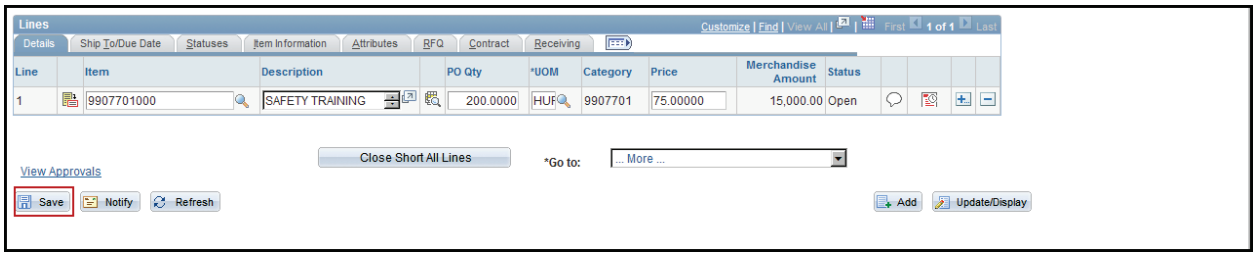


11 Enter your accounting distribution.

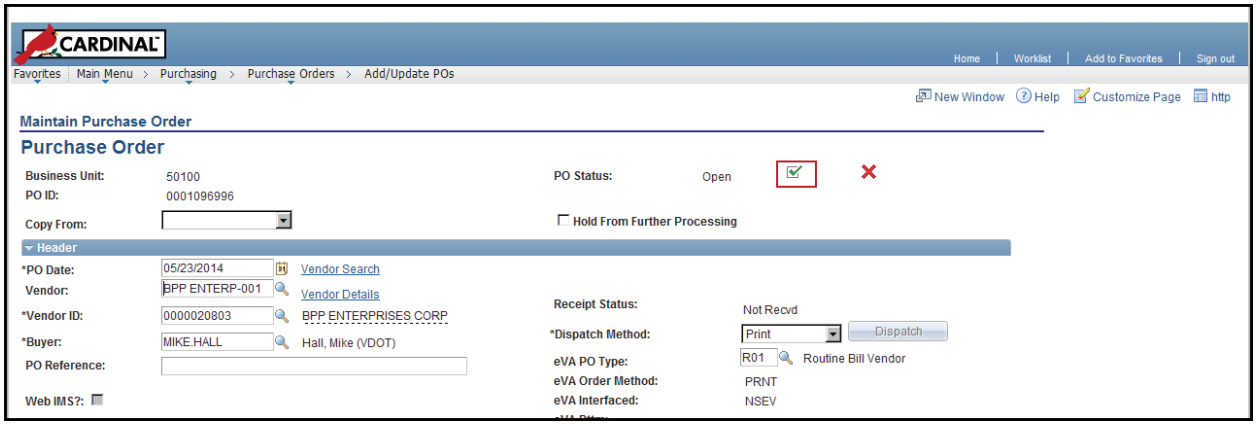
12 Click **OK.**



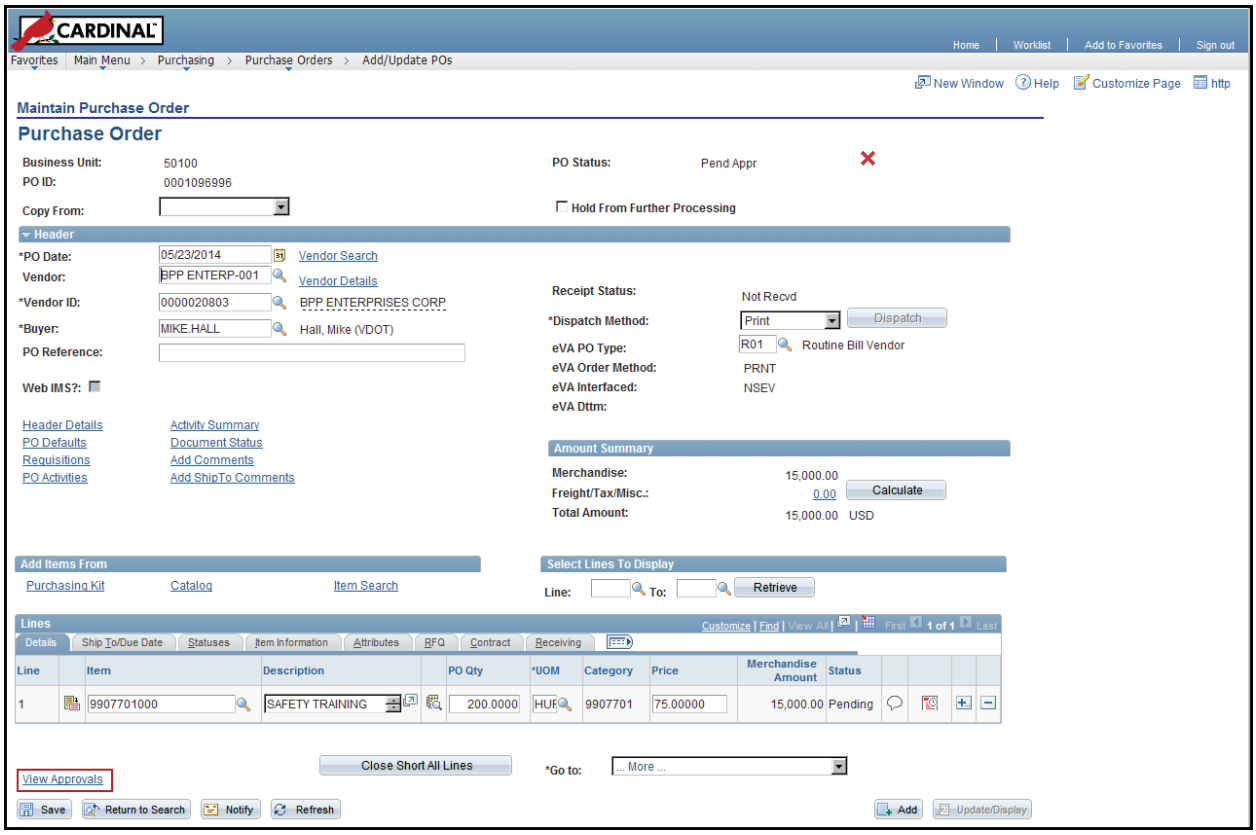
13 Click **Return to Main Page** hyperlink.



14 Click **Save**.



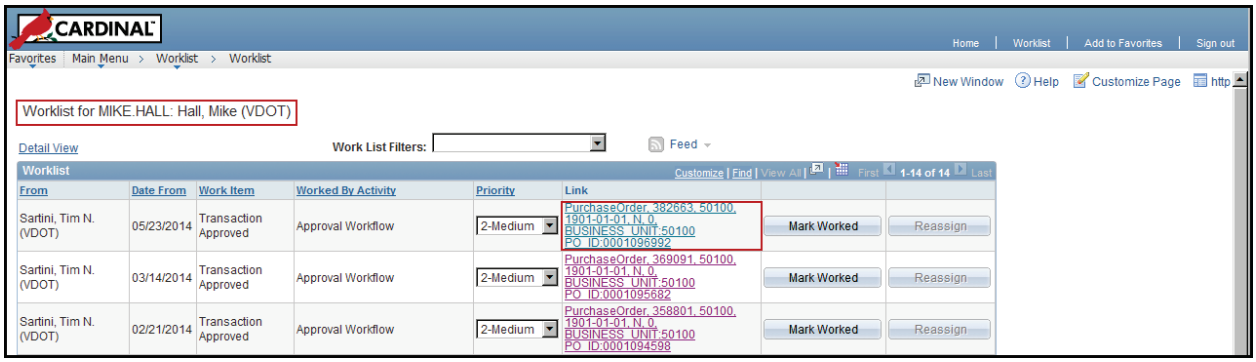
15 Click on **PO Status** checkbox.



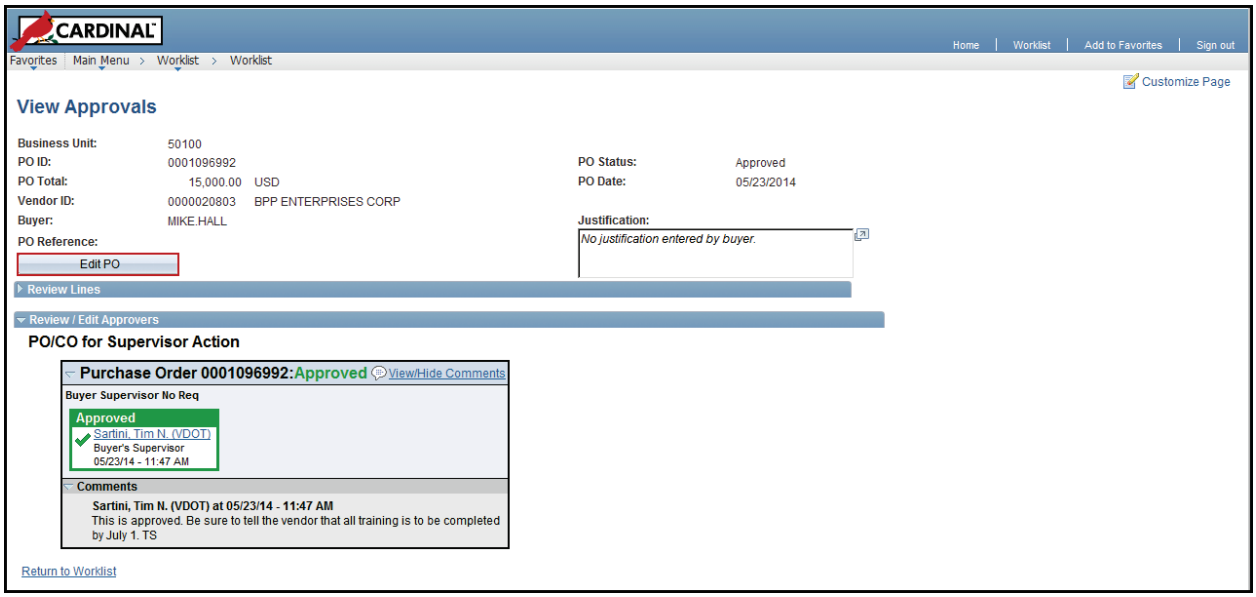
16 The PO is complete and routes to the Supervisor's **Worklist** for approval.

17 Click on **View Approvals** hyperlink to view Supervisor's name.

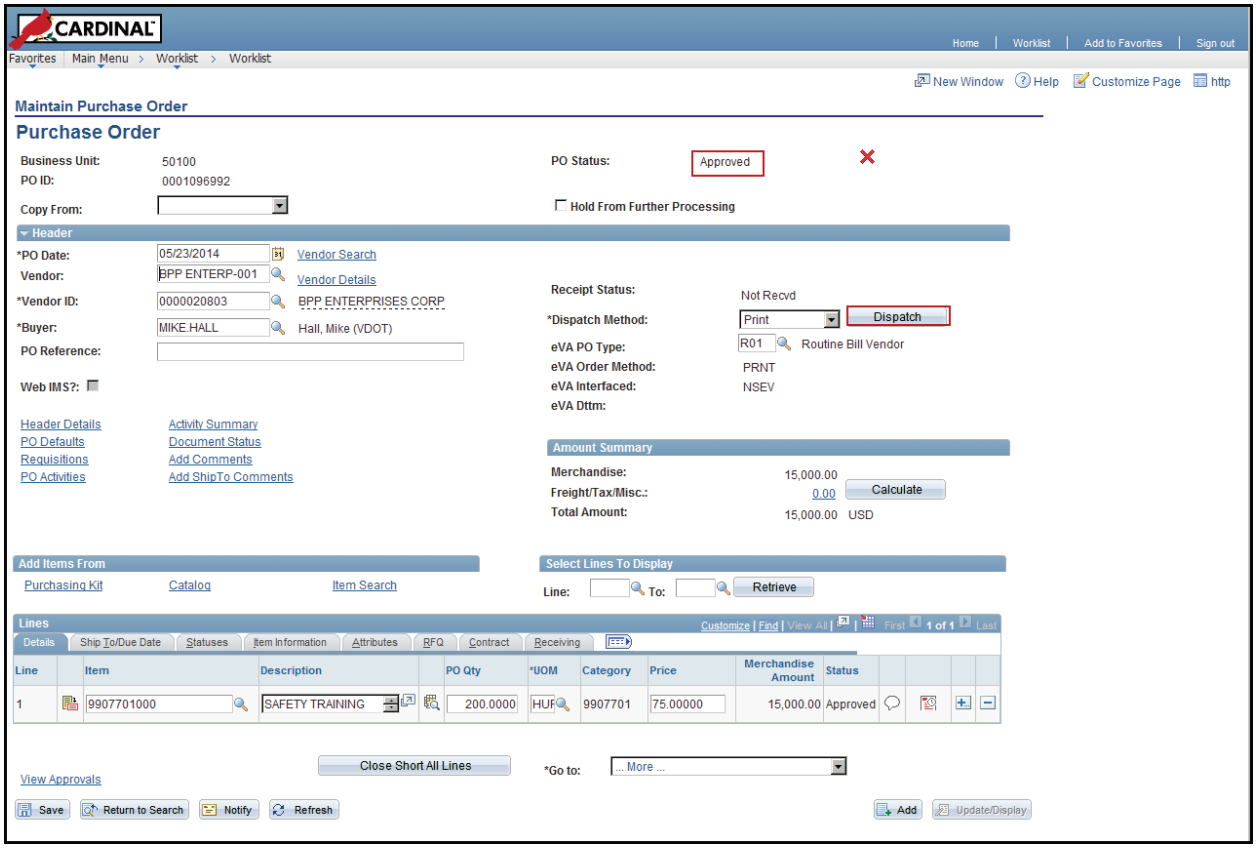
18 Upon approval, the Buyer receives an email and can navigate to the PO from the hyperlink.



19 Or, from the Worklist, click on Purchase Order hyperlink.

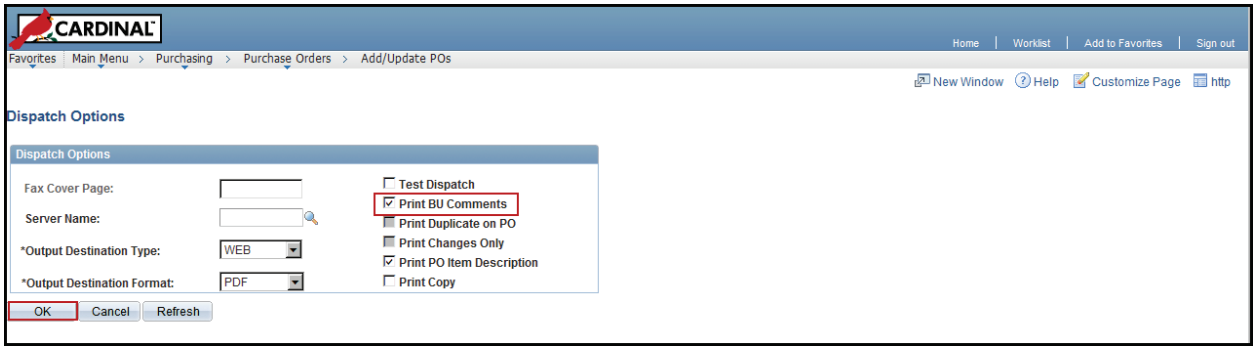


20 Click on **Edit PO** button.



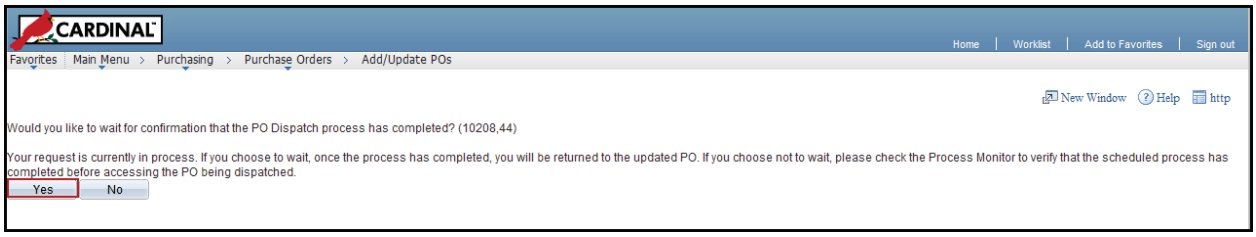
21 PO is displayed and shows **Approved** status.

22 Click on **Dispatch** button.

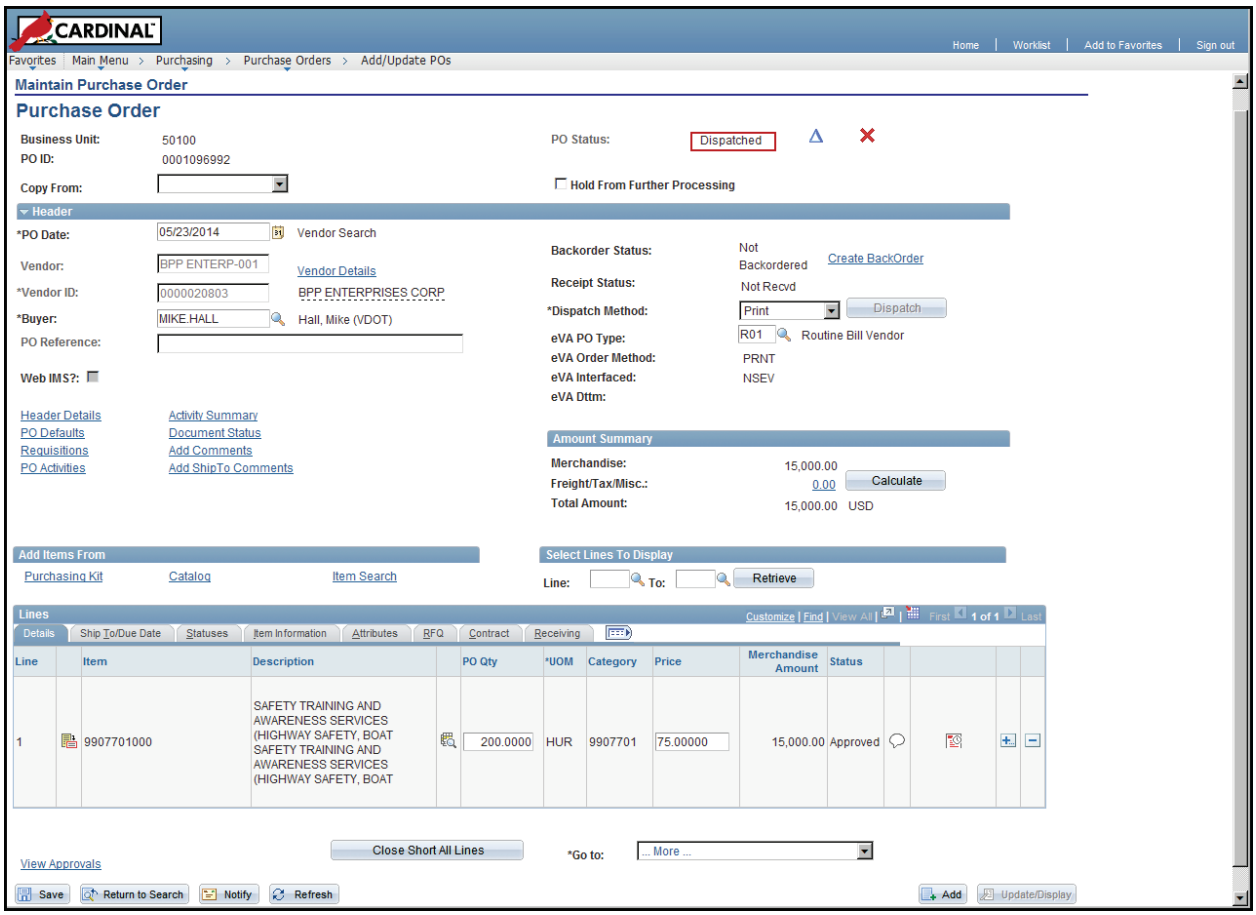


23 Check **Print BU Comments** to display Line and Header comments, to include eVA T&C.

24 Click **OK**.



25 Click **Yes**

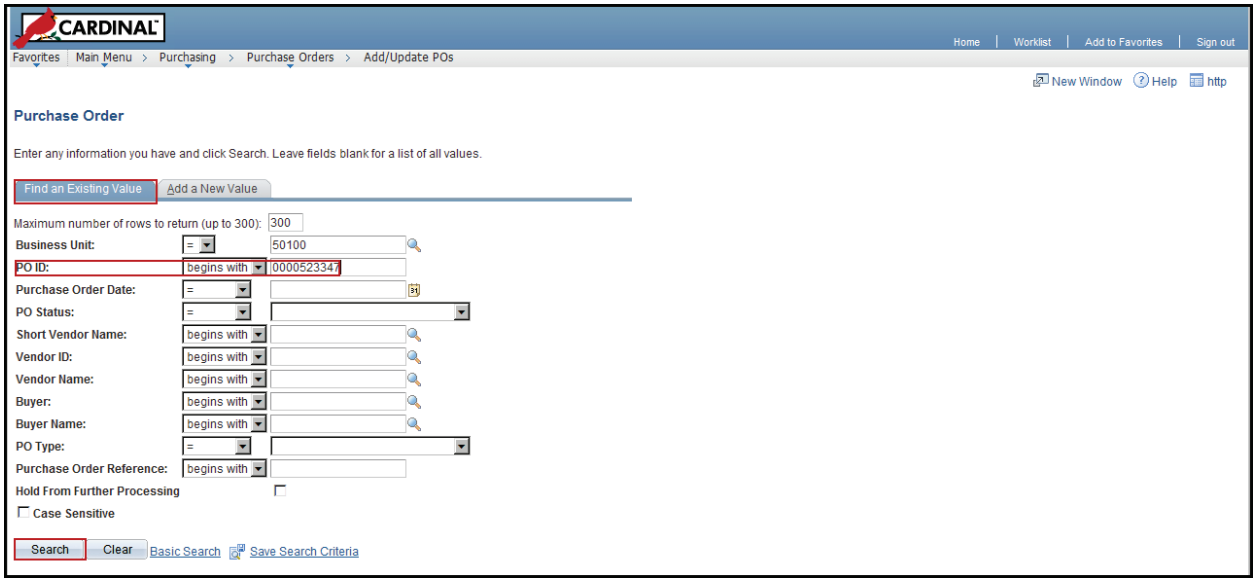


26 Purchase Order is **Dispatched.**

27 Electronic file copy will be sent to eVA.

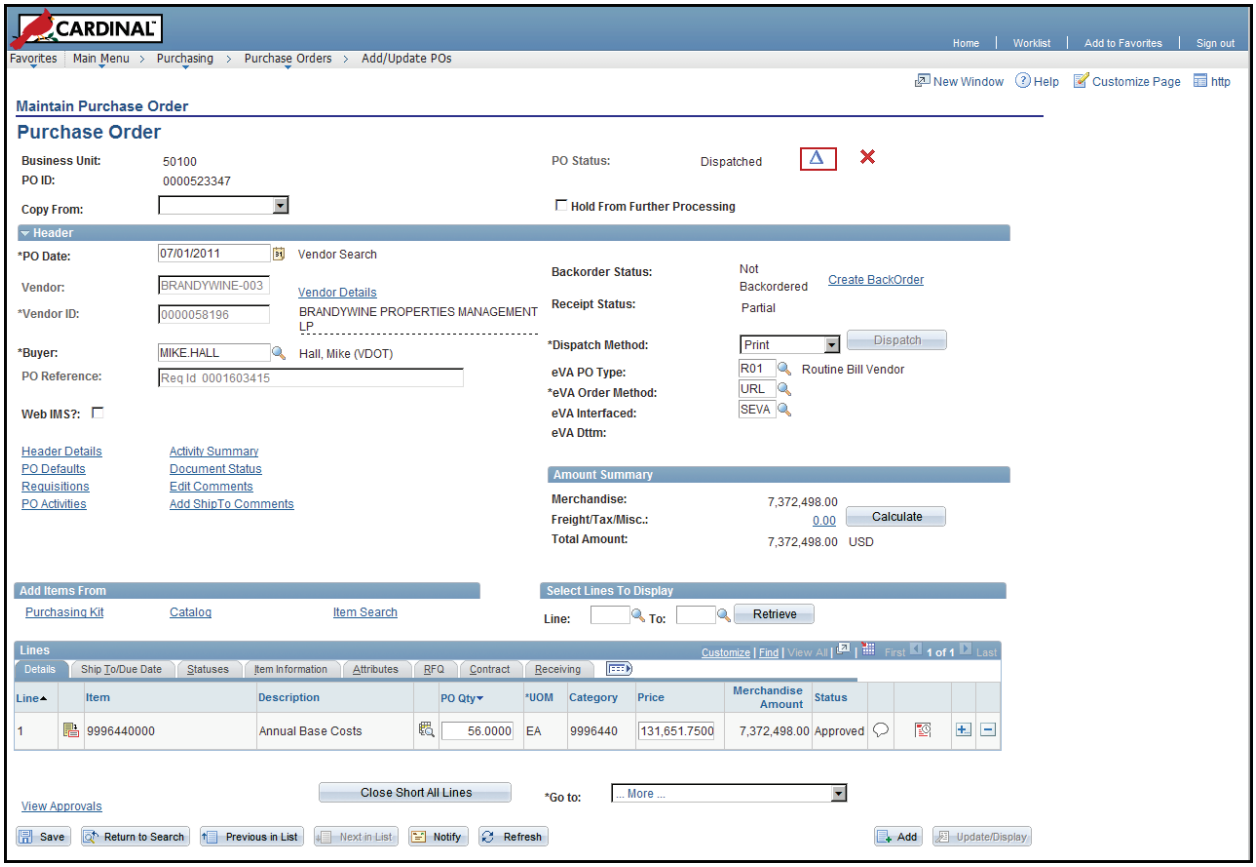
Change Orders

Change Orders are used to change or update PO quantities, dollar values, shipping/billing addresses, or to add or cancel line items. In addition, since vendors and agencies are charged eVA fees based on the values of a PO, all PO's must be reconciled (change order) to match the received and paid amounts.

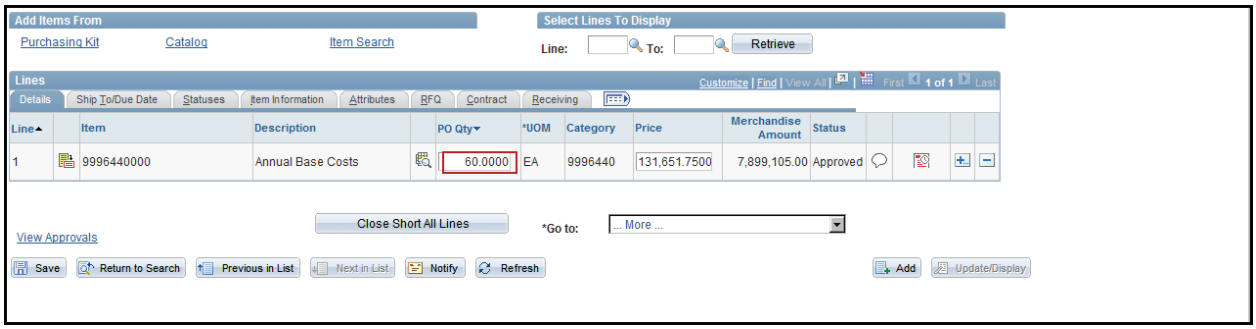


1. Navigate: **Main Menu > Purchasing > Purchase Orders > Add/Update POs**
2. Select **Find an Existing Value** tab.
3. Enter the **PO ID #** that you wish to make changes to.
4. Click **Search** button.

In this example, we are increasing the quantity of the PO

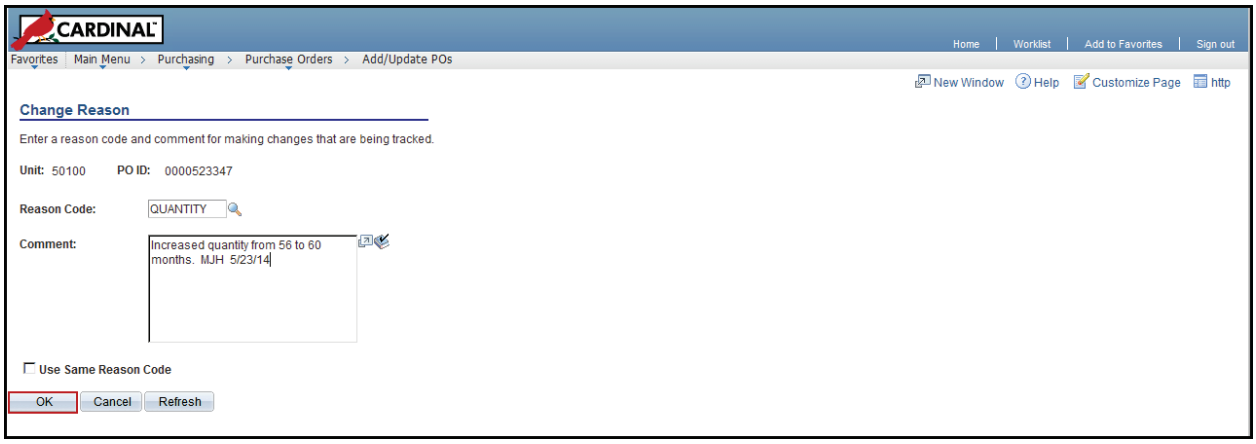


5 Click on **Change Order** icon.



6 Make change as required to existing line(s). **PO Qty** is increased from **56** to **60**.

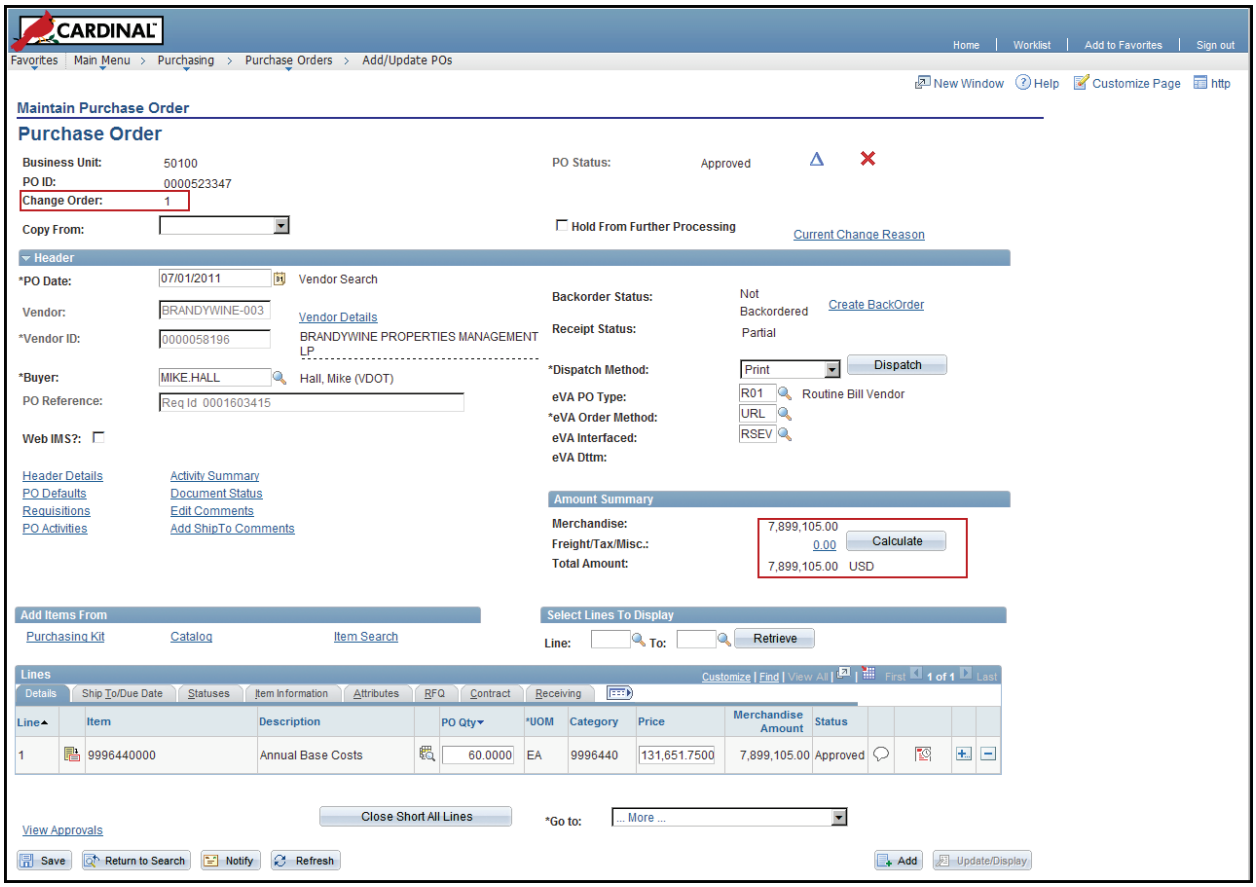
7 Click **Save**.



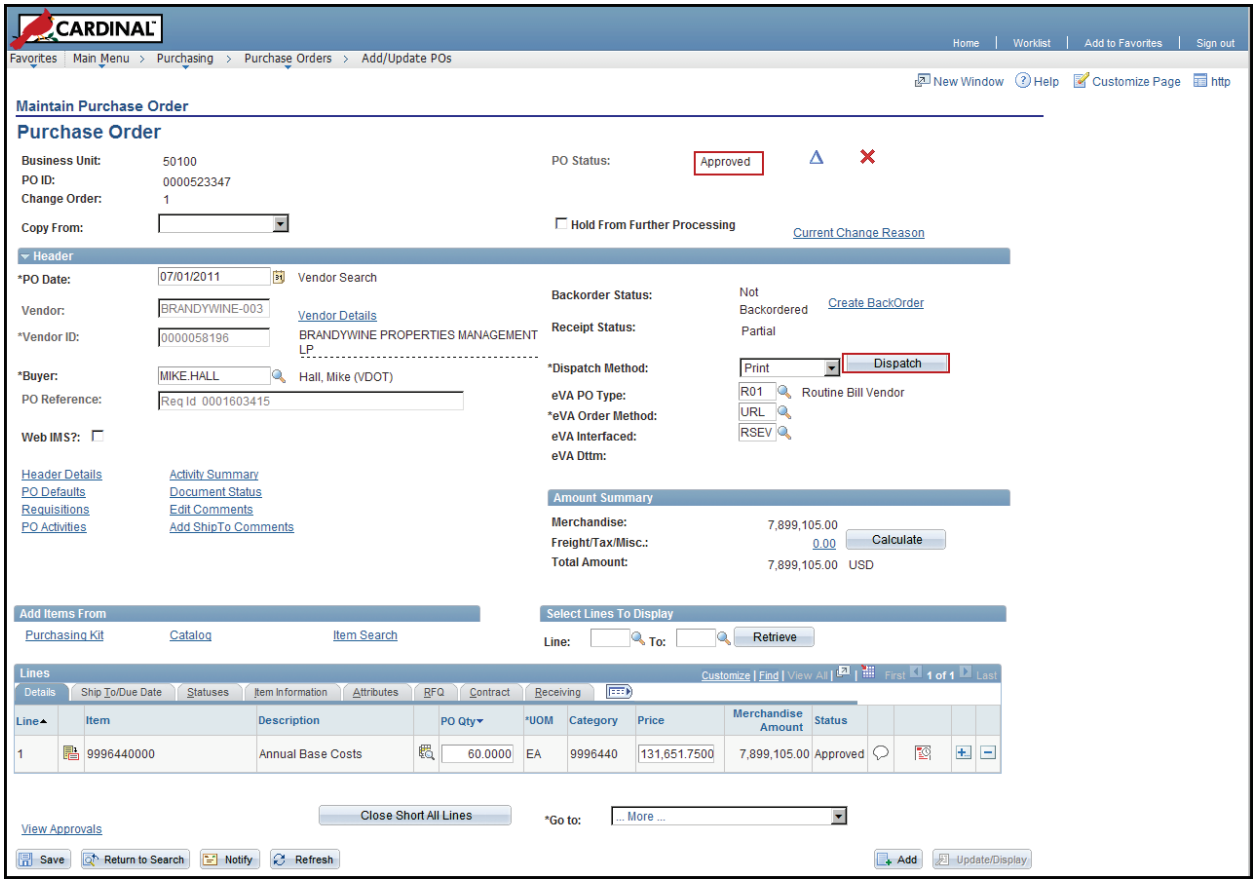
8 **Change Reason** page displays.

9 Enter **Reason Code** and **Comment**, to explain change(s).

10 Click **OK**.

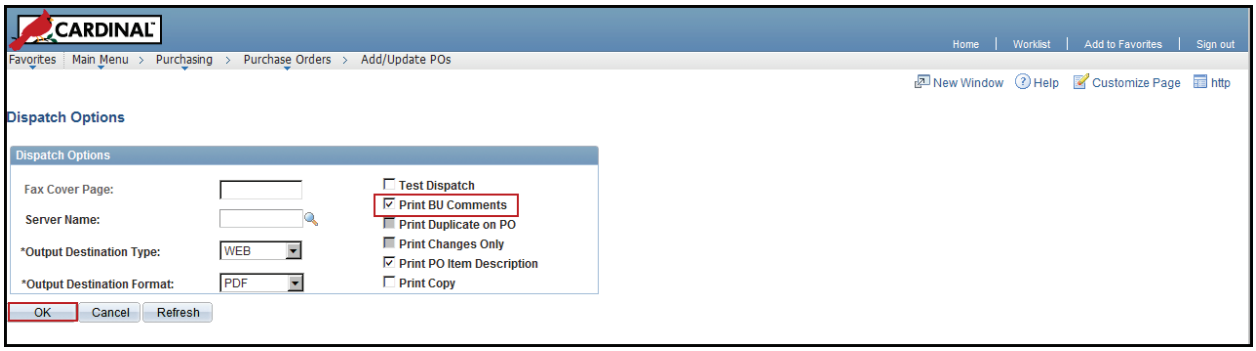


11 **Change Order #** displays, showing updated fields and recalculated amounts.



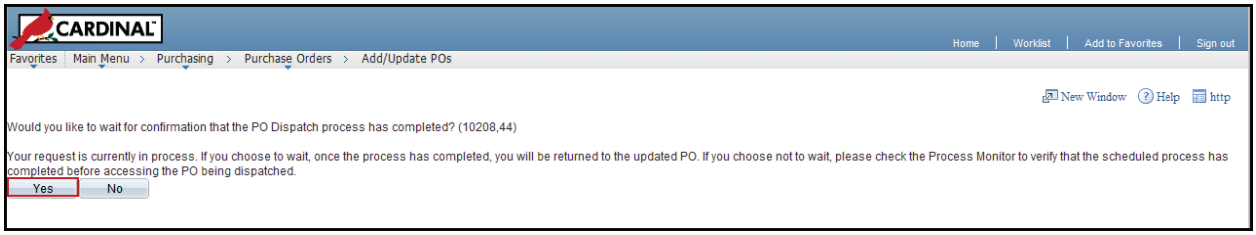
12 PO Status remains **Approved**. (When changes do not increase PO value by more than 25%)

13 Click on **Dispatch** button.

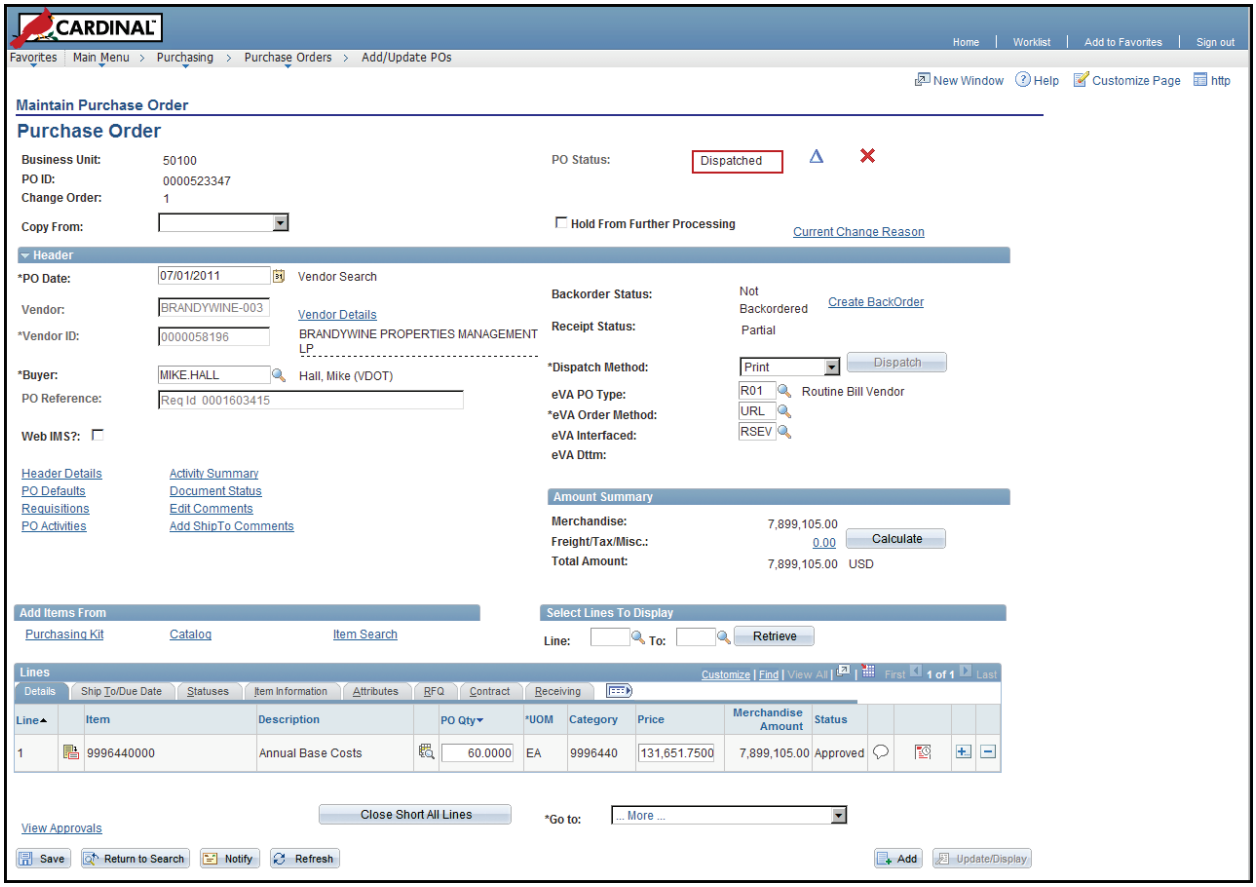


14 Verify **Print BU Comments** is checked.

15 Click **OK**.



16 Click **Yes**



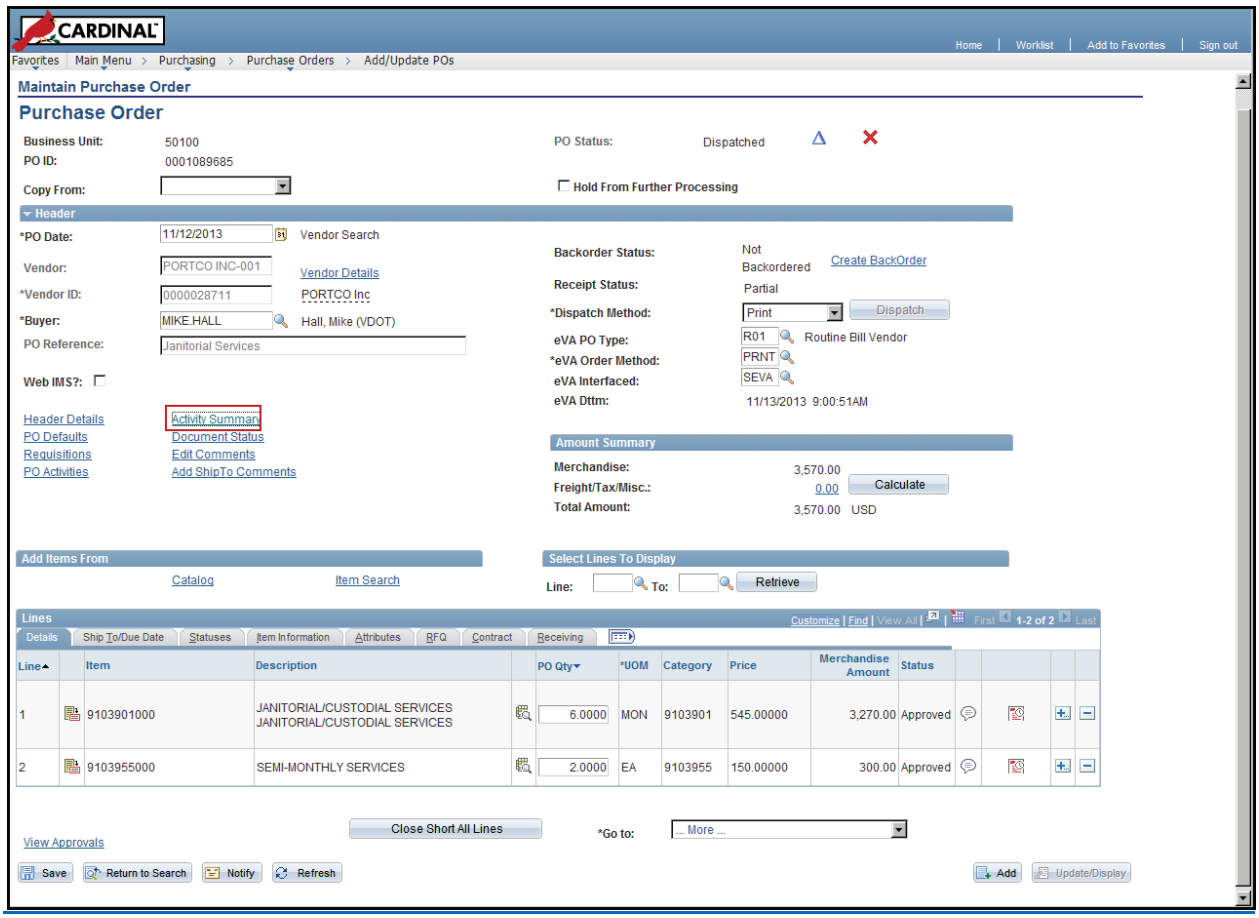
17 PO/Change Order is **Dispatched** and resent to eVA. The Vendor receives an electronic “confirming order” or the Buyer prints and sends the vendor a copy.

Reconcile/Close-Out PO

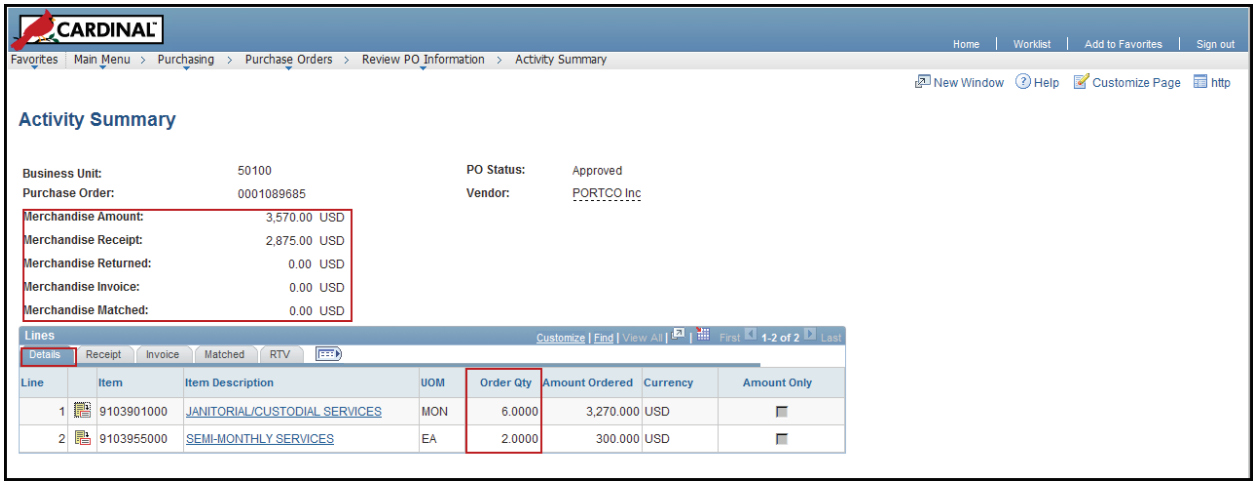
Once a PO activity is complete and the amount/quantity received differs from what was ordered, you must reduce or increase (reconcile) the quantities or amounts to match the received, invoiced and matched amounts.

For Example:

1. Navigate: **Main Menu > Purchasing > Purchase Orders > Add/Update POs**
2. Select **Find an Existing Value** tab.
3. Enter the **PO ID #** that you wish to close out.
4. Click **Search** button.

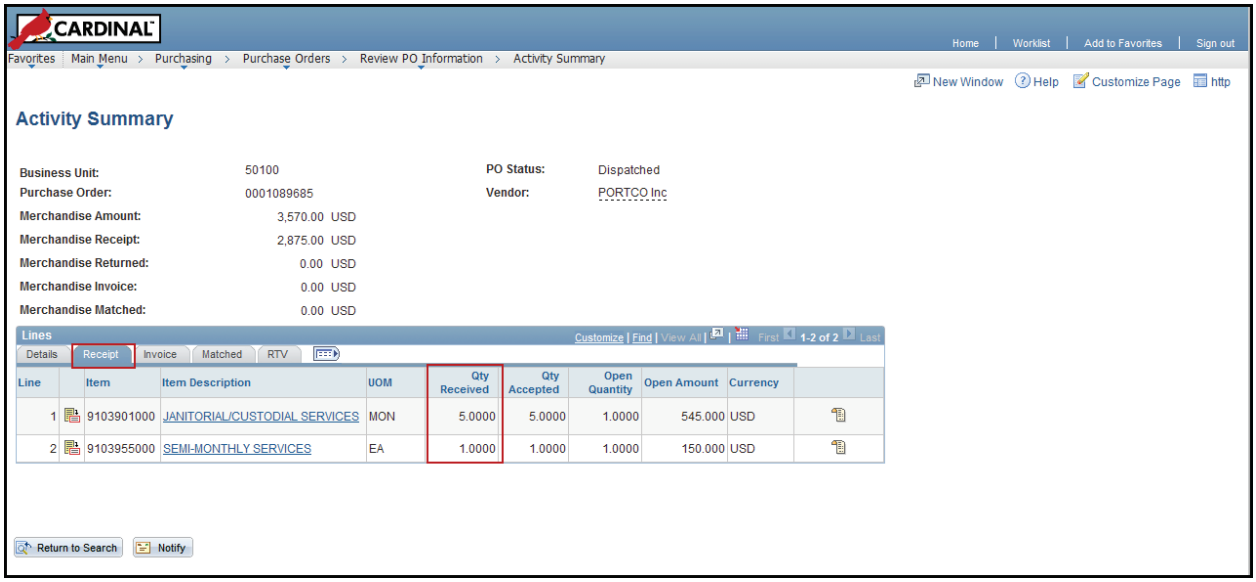


5. PO displays…click on the **Activity Summary** hyperlink.
6. A new page will open.



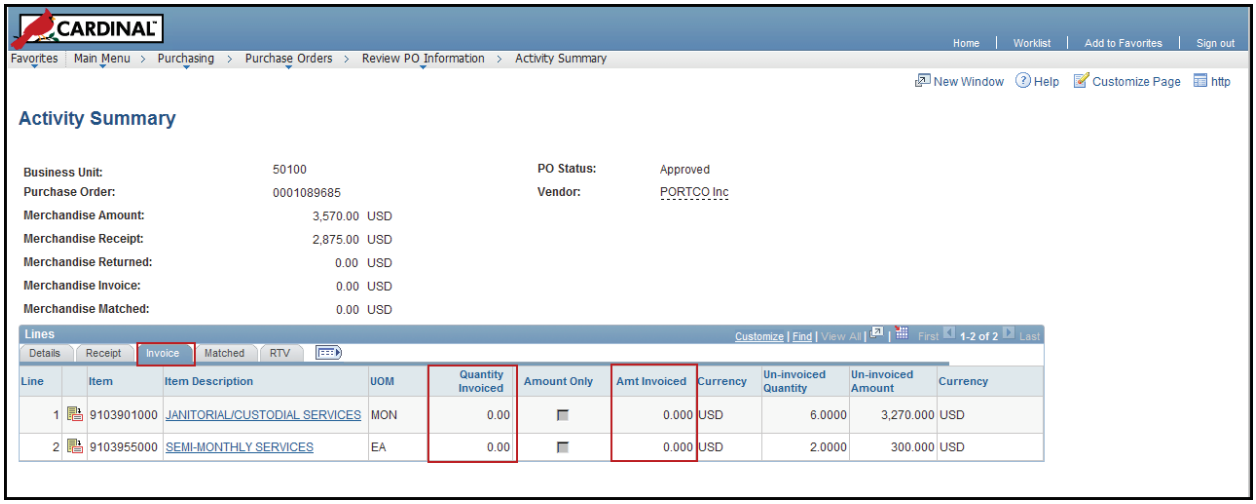
7 The **Activity Summary** header displays the **Merchandise Amount**, **Merchandise Receipt, Merchandise Returned, Merchandise Invoice** and **Merchandise Matched**.

8 The **Details** tab displays the **Order Quantity**.

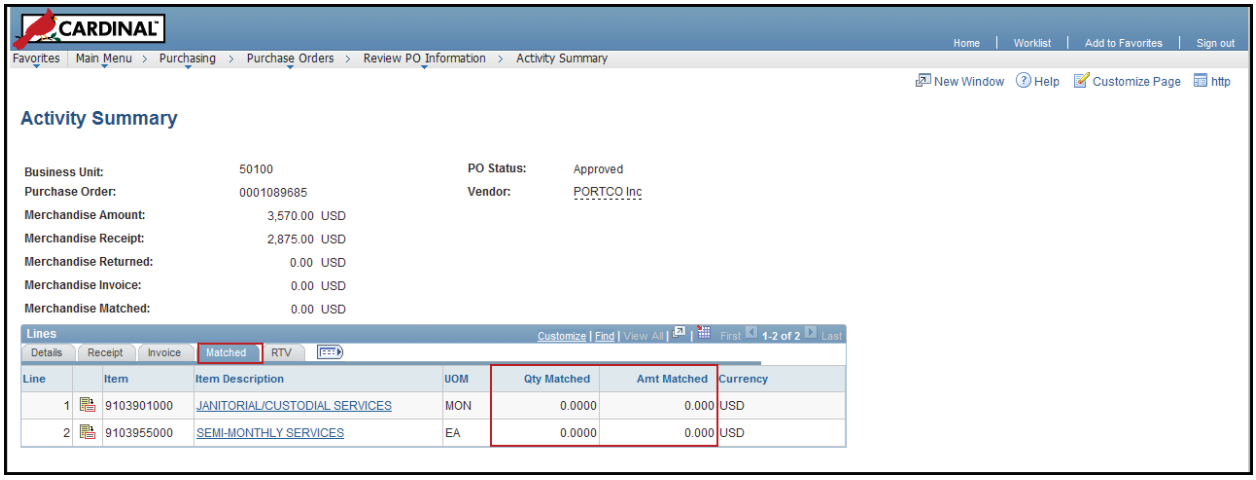


9 The **Receipt** tab displays the **Qty Received**.

10 5 of 6 on **Line 1** and 1 of 2 on **Line 2** have been received.



11 The **Invoice** tab displays the **QTY Invoiced** (by Vendor) and **Amt Invoiced** (vouchered by VDOT).



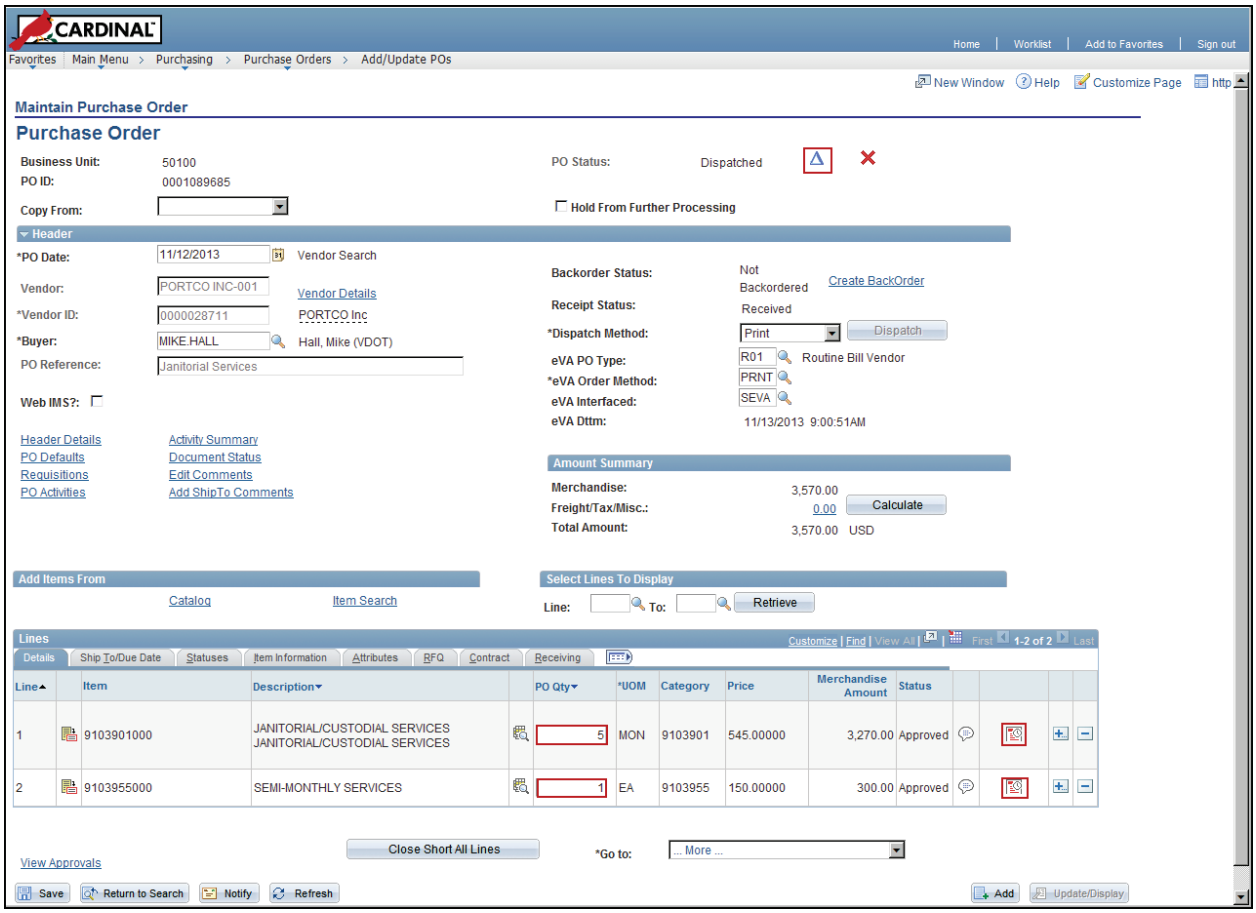
12 The **Matched** tab displays the **Qty Matched** and **Amt Matched** that have been paid.

13 Payment has not yet been made.

14 Close or minimize the page.

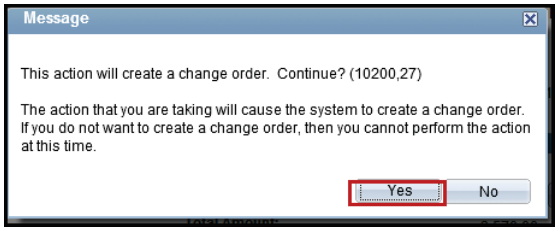
Cardinal displays a change order message if you make changes to a dispatched PO.

In this example, the blue Change Order icon is not clicked.



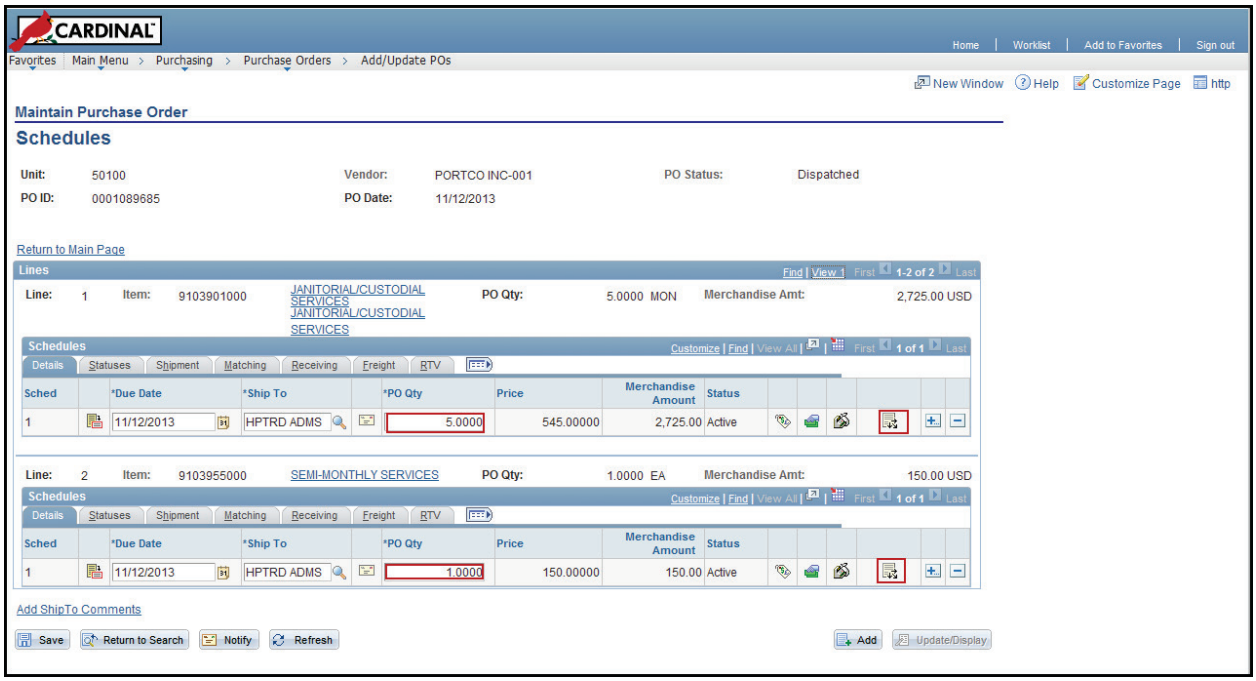
15 Enter the quantity received found from the **Activity Summary**.

16 Click on the **Schedule** icons.



17 Change Order message is displayed

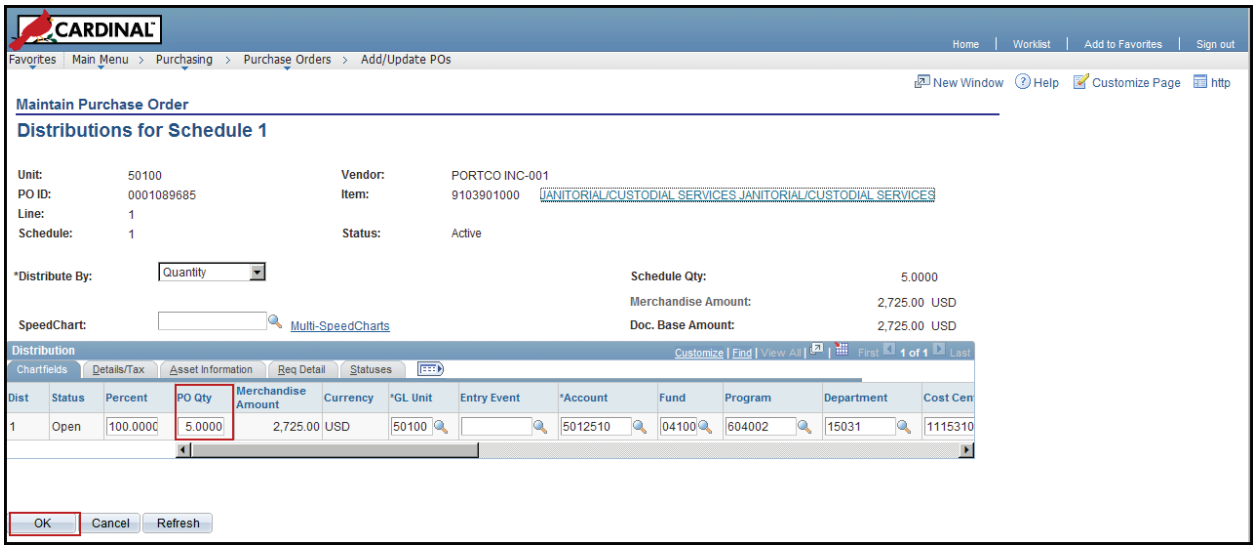
18 Click **Yes**.



19 **Schedules** are displayed.

20 Verify quantities and amounts match your changes.

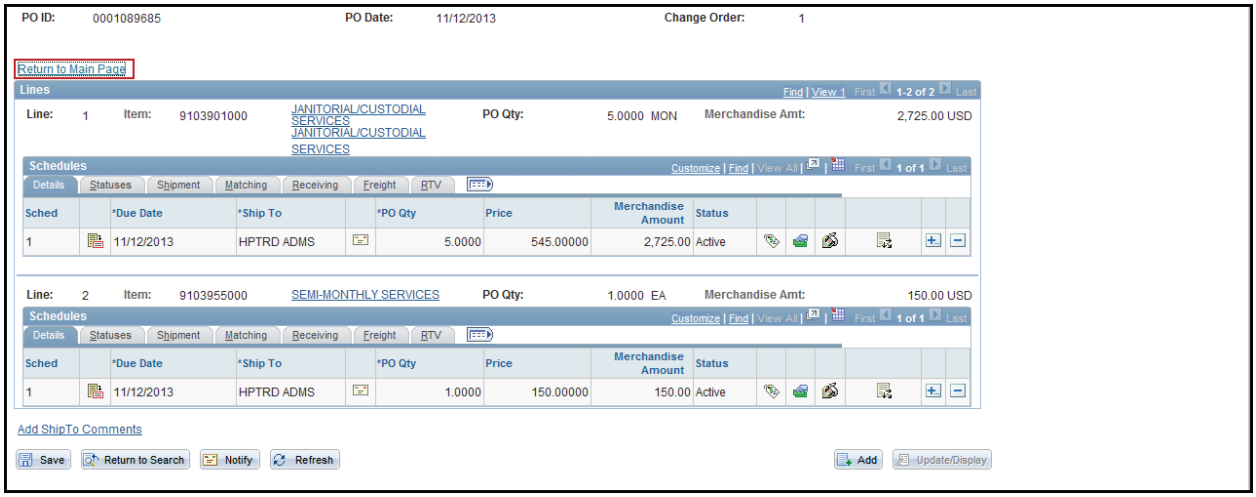
21 Click the **Distribution** icons.



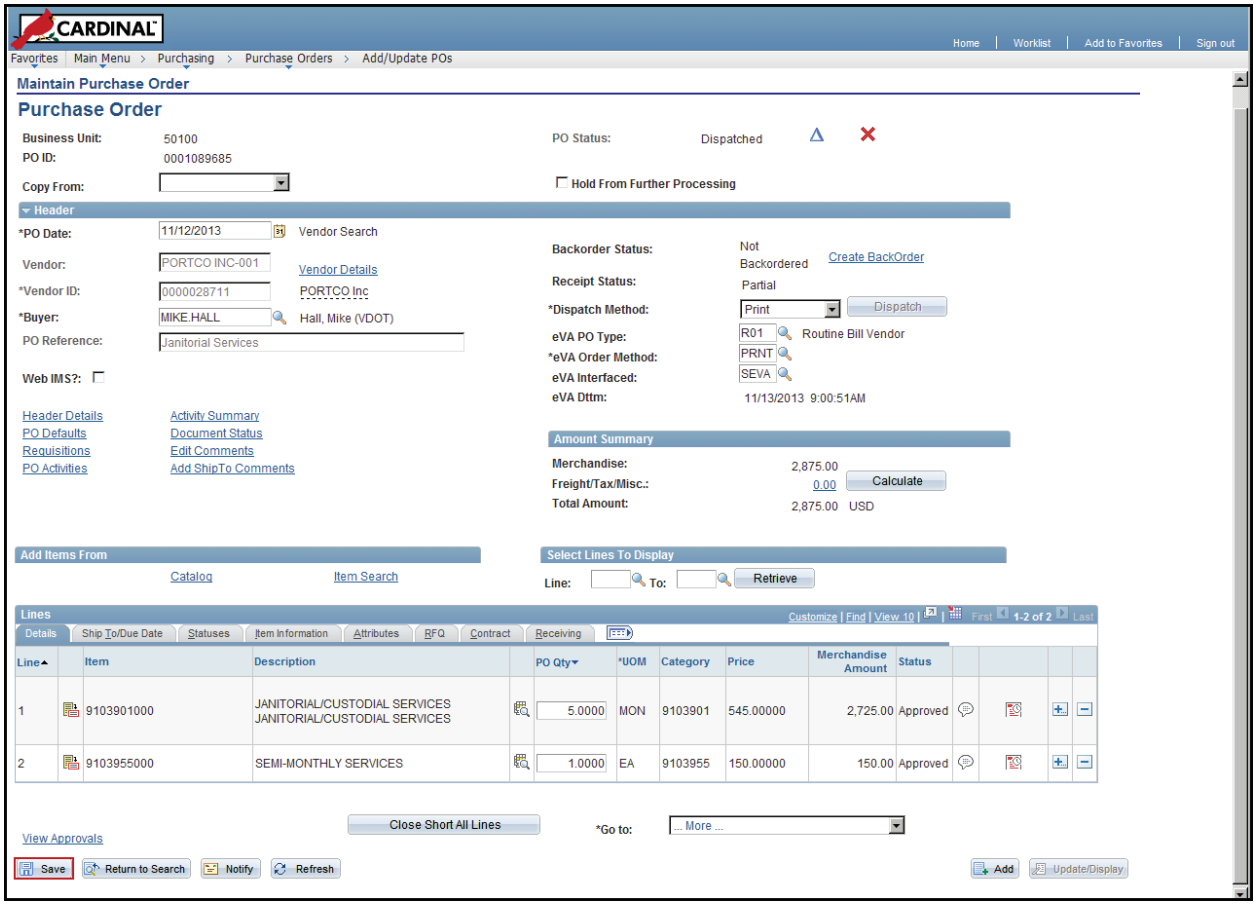
22 **Distribution** is displayed.

23 Verify quantity and amount matches your changes.

24 Click **OK**.

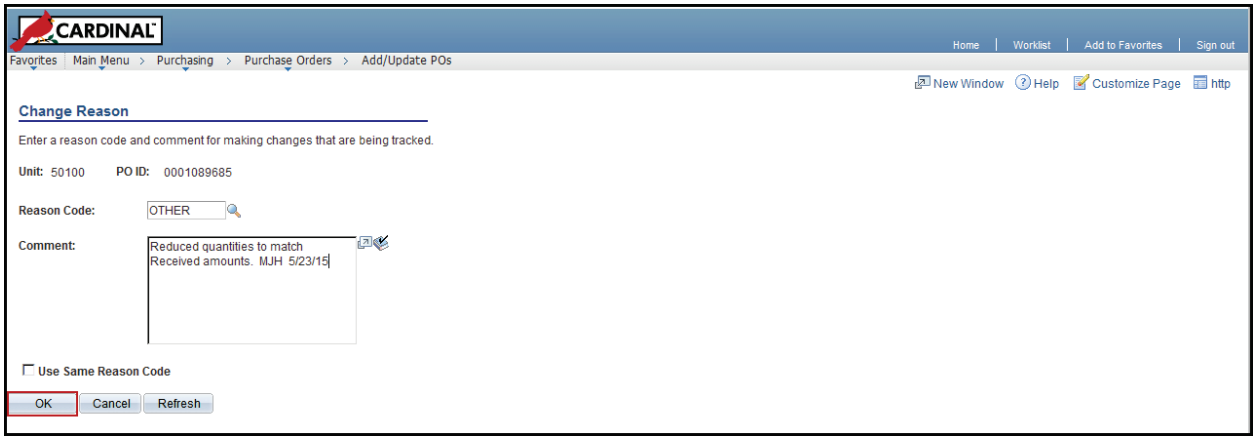


25 Click on **Return to Main Page** hyperlink.



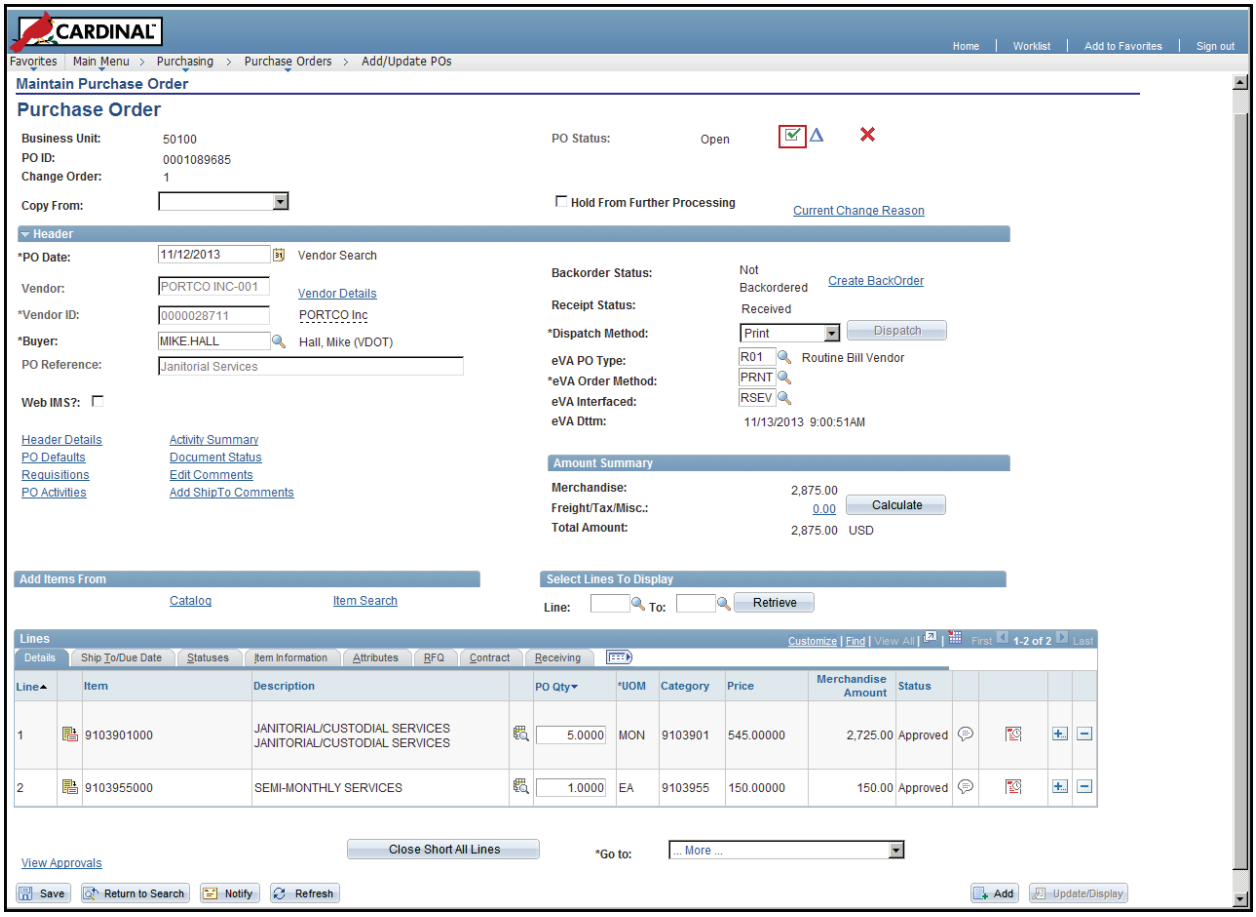
26 Verify the changes have been applied.

27 Click **Save**.



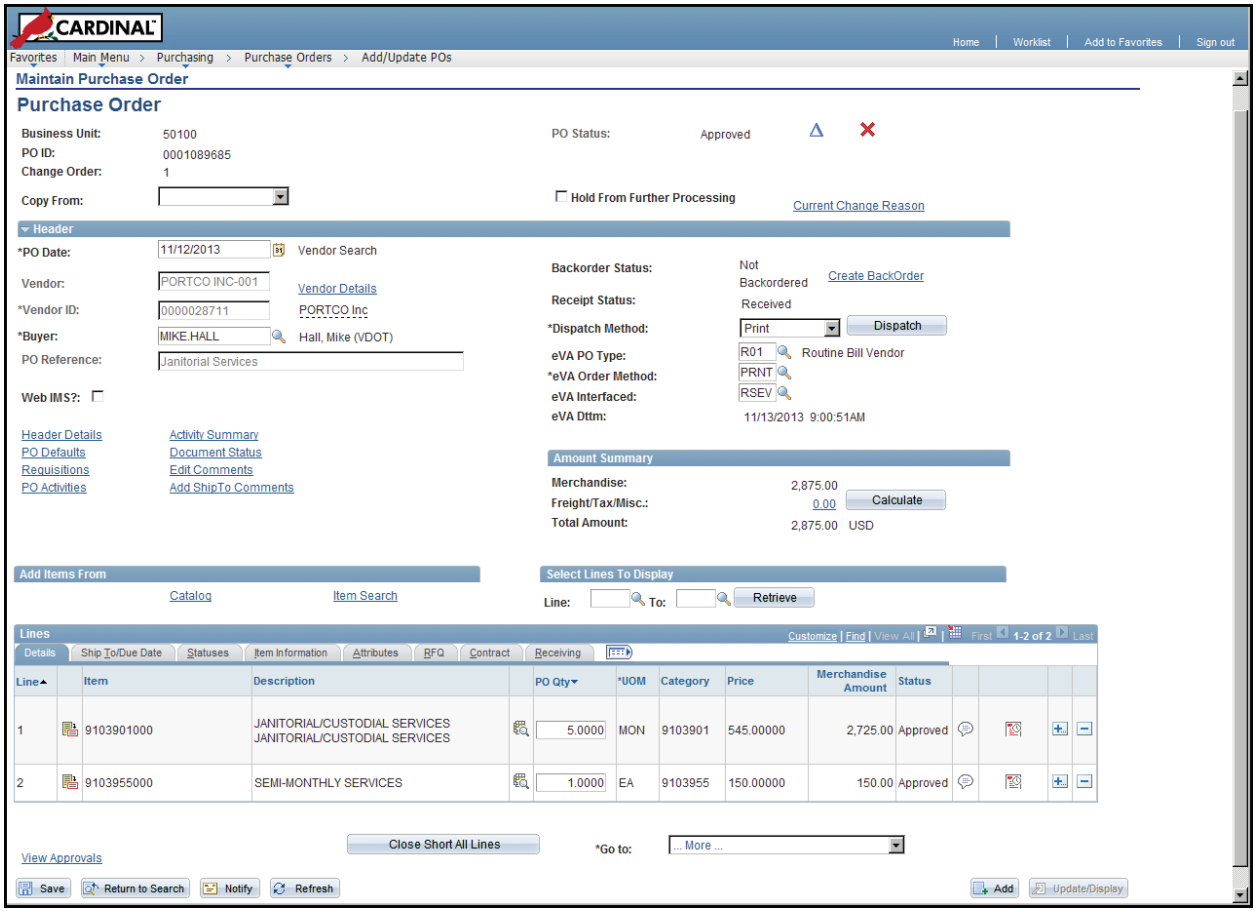
28 **Change Reason** message is displayed.

29 Enter/update reason and click **OK**.



30 The Change Order is updated.

31 Click on the **PO Status** check box.



32 Change Order is **Approved** and ready for dispatch.

33 Once Dispatched (either manually or by batch process), the PO will be reconciled/closed out.

HELPFUL HINTS

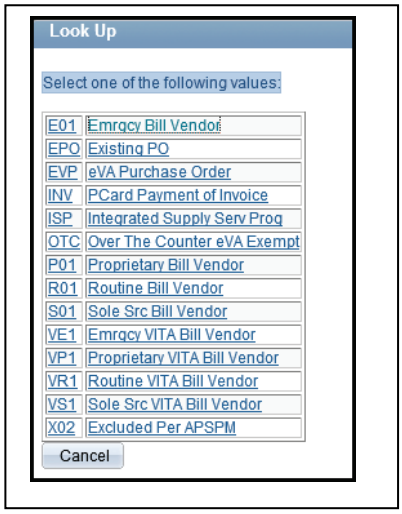
PO Default Items:

eVA Order Method = The PO is delivered to the vendor based on preference set up in eVA. You will not have access to make any changes.

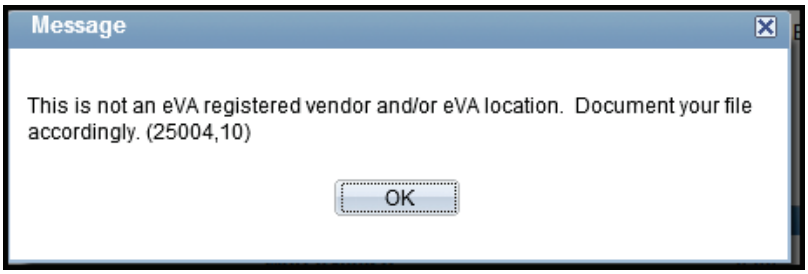
- **Vendor is Exception:** Most Government (Public Agency) type vendors are set up in Cardinal with an eVA preferred order method of exception, which keeps the Cardinal PO from being interfaced to eVA.
- **Vendor is URL:** Vendor registers in eVA to receive electronic Pos. URL is a Uniform Resource Locator, used as an address on the World Wide Web.
- **Vendor is Print:** The buyer needs to send the PO to the vendor manually (fax, email, etc).

eVA PO Type = eVA fee billing method

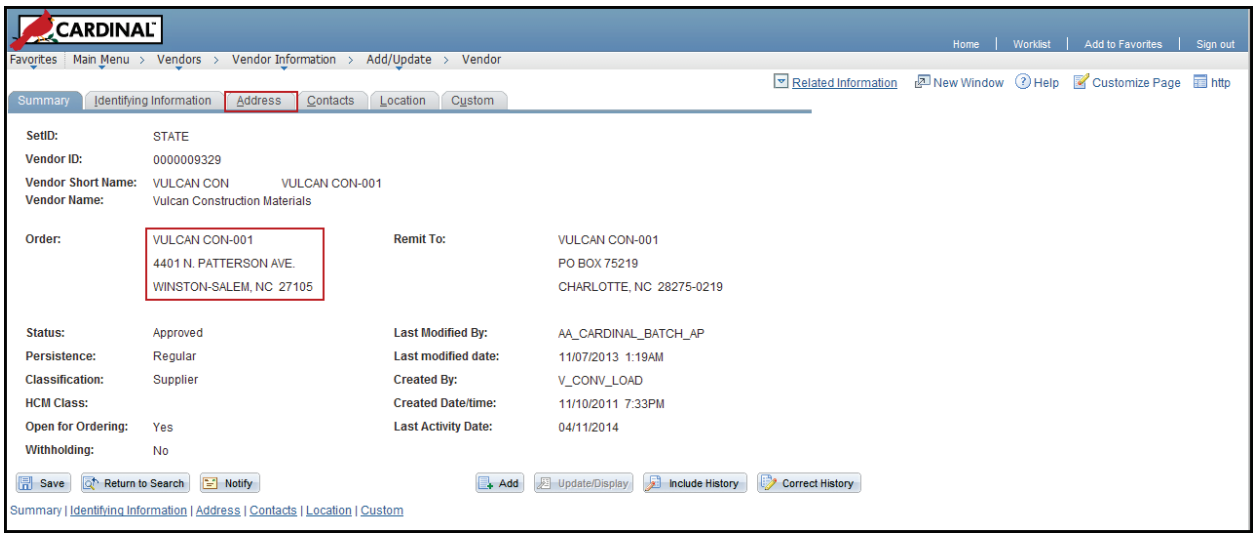
E01 = Emergency Bill Vendor
EPO = Existing PO
EVP = eVA Purchase Order
P01 = Proprietary Bill Vendor
R01 = Routine Bill Vendor
S01 = Sole Source Bill Vendor
VE1 = Emergency VITA Bill Vendor
VP1 = Proprietary VITA Bill Vendor
VR1 = Routine VITA Bill Vendor
VS1 = Sole Source VITA Bill Vendor
X02 = Excluded Per APSPM



Vendors:



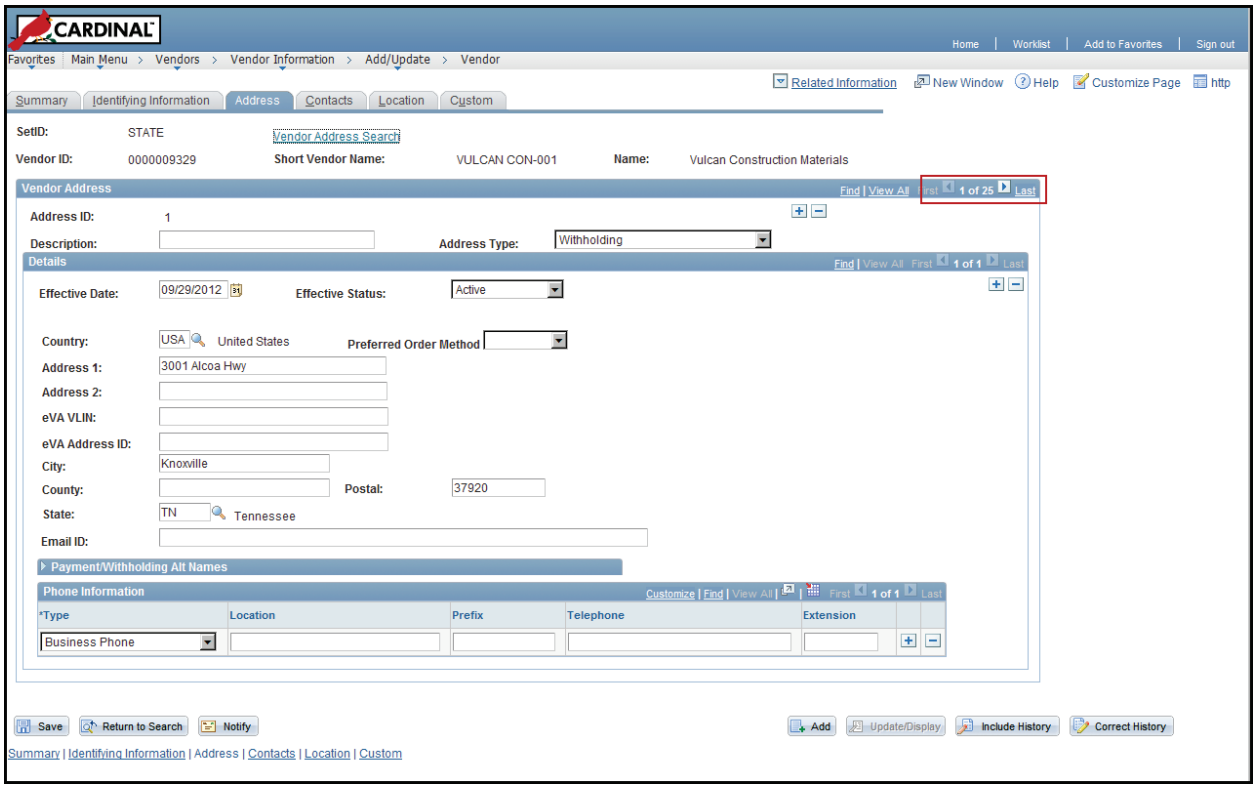
- If the message (above) is displayed, the selected vendor must be changed.



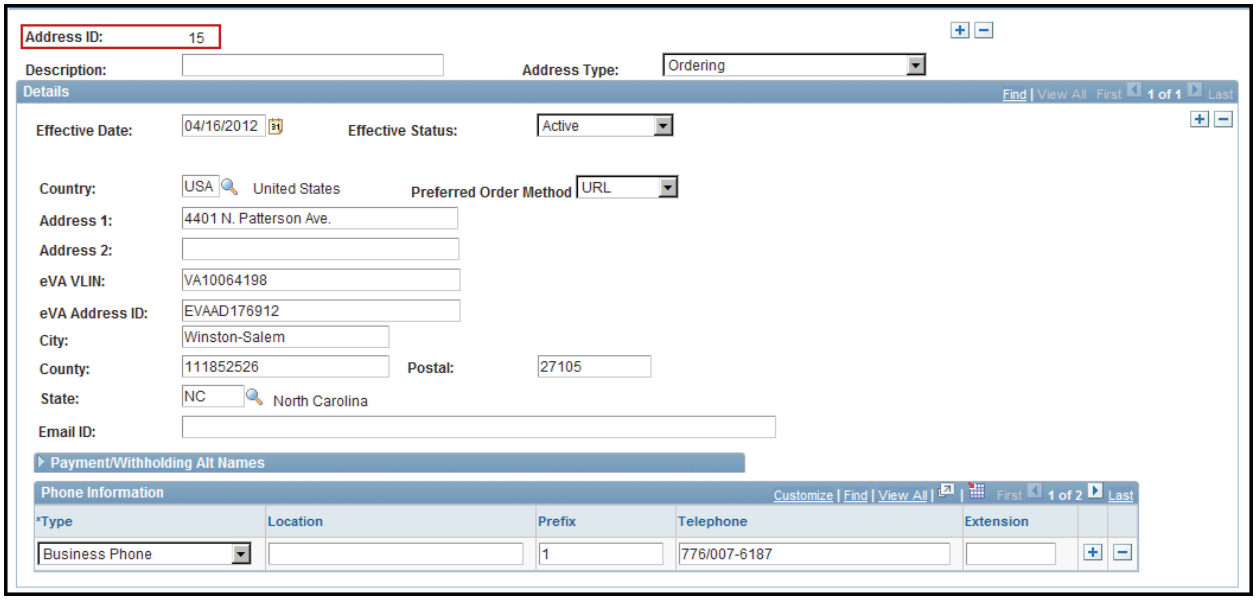
- Vendor information/data is transmitted from eVA into Cardinal. It is important to ensure the selection of the eVA vendor and specific ordering address is correct on the PO.

  For example*: (Vulcan Construction Materials)*

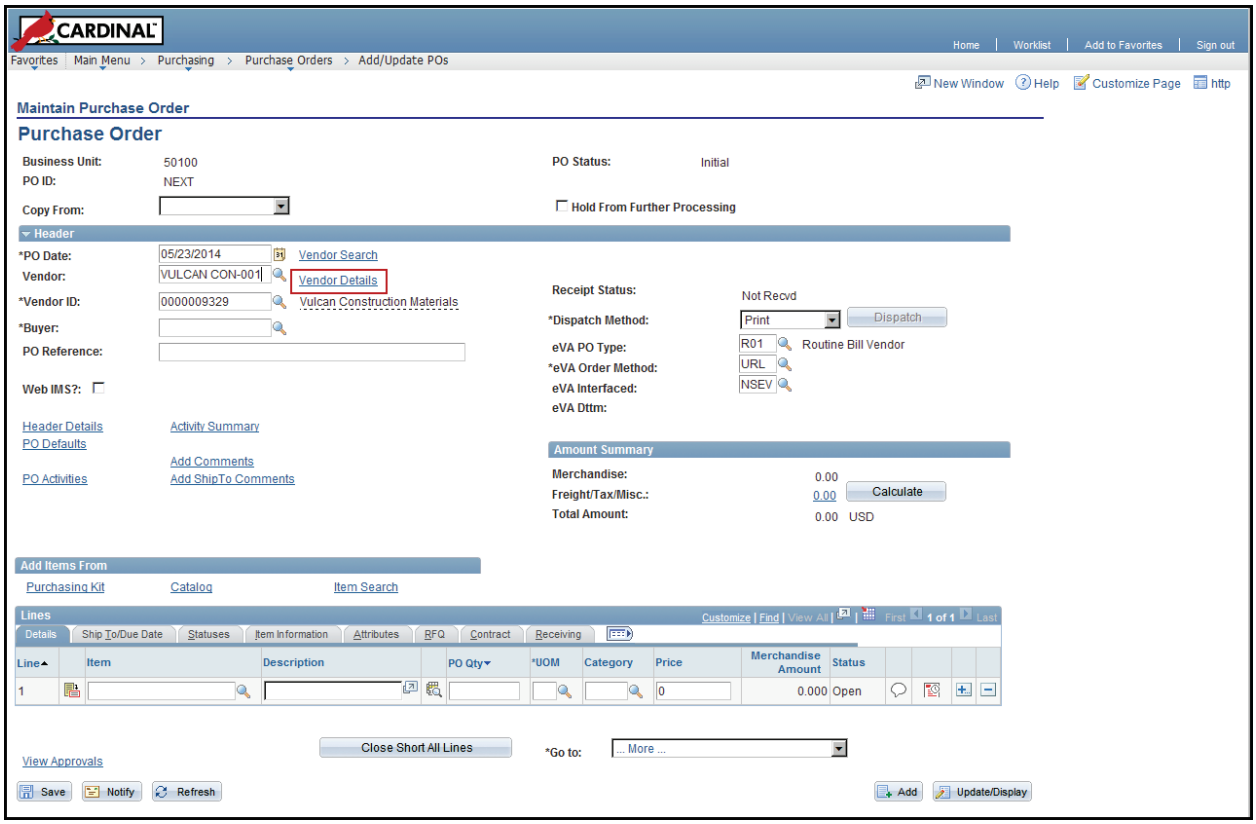
- Navigate as shown to view vendor information. The Main ordering default address is displayed.
- Select the **Address** tab.



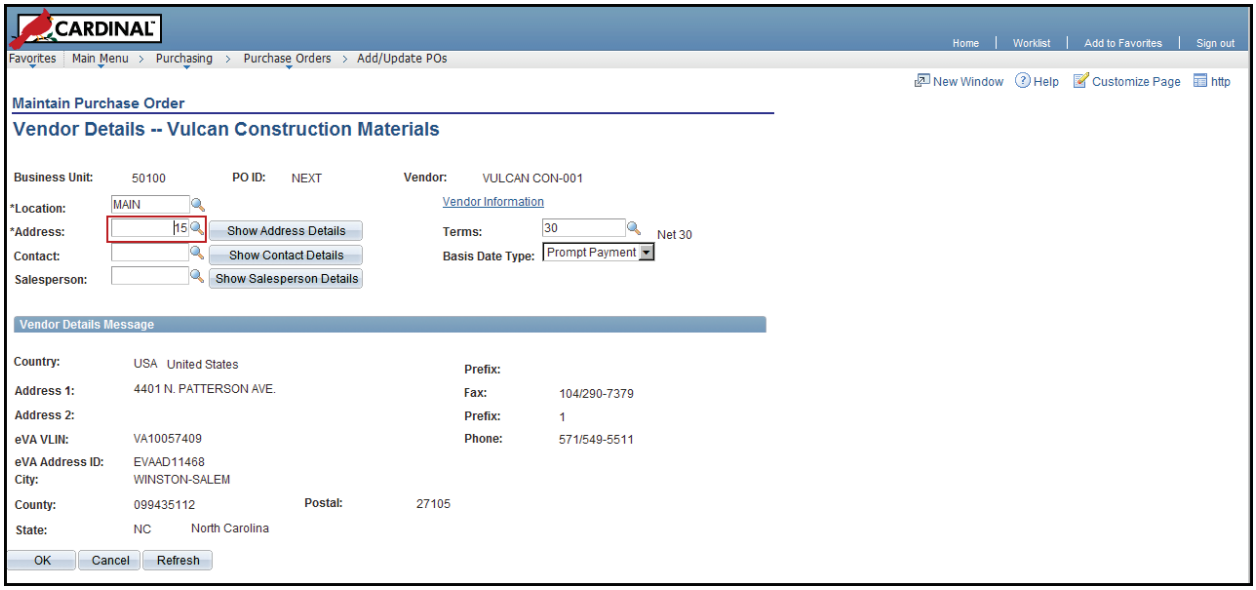
- There are 25 available addresses.



- Open up the listing and identify which Ordering Address ID you wish to select.



- On the PO, enter the Vendor and Click on **Vendor Details** hyperlink.



- Enter selected vendor address ID #.

VDC Purchase Orders:

- Vendor ID #0000031103 Department of General Services – Surplus
- Select address # 9 from the Vendor Details hyperlink.
- Enter the VDC item number in the line **Manufacturer's Item ID** field.
- To add the VDC item to a dispatched PO, a Change Order must be created.

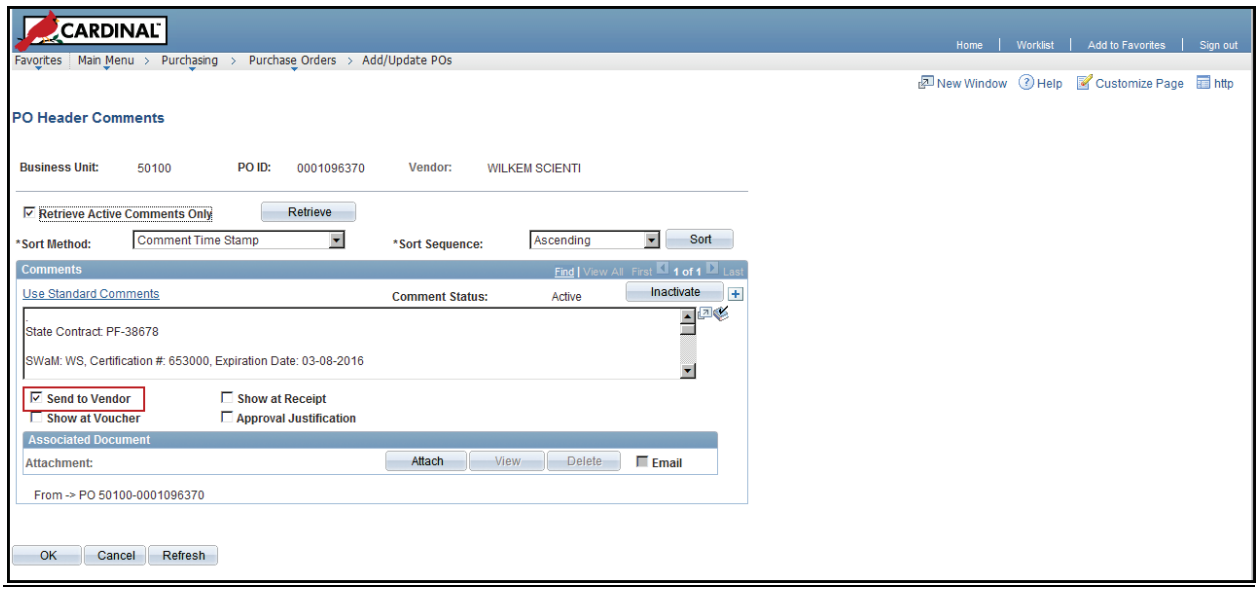
Change Orders:

- Changes < 25% do not need Supervisor approval.
- Adding a line to a PO will require Supervisor approval.
- Changes > 25% will escalate to the Supervisor for approval.
- Changes >25% or $50,000 (whichever is greater) will escalate to the ASD Director for approval.
- Never change the unit price on an item that has already been received and vouchered. Close out the line amount to what has been matched and insert a new line for the remaining items at a changed price.

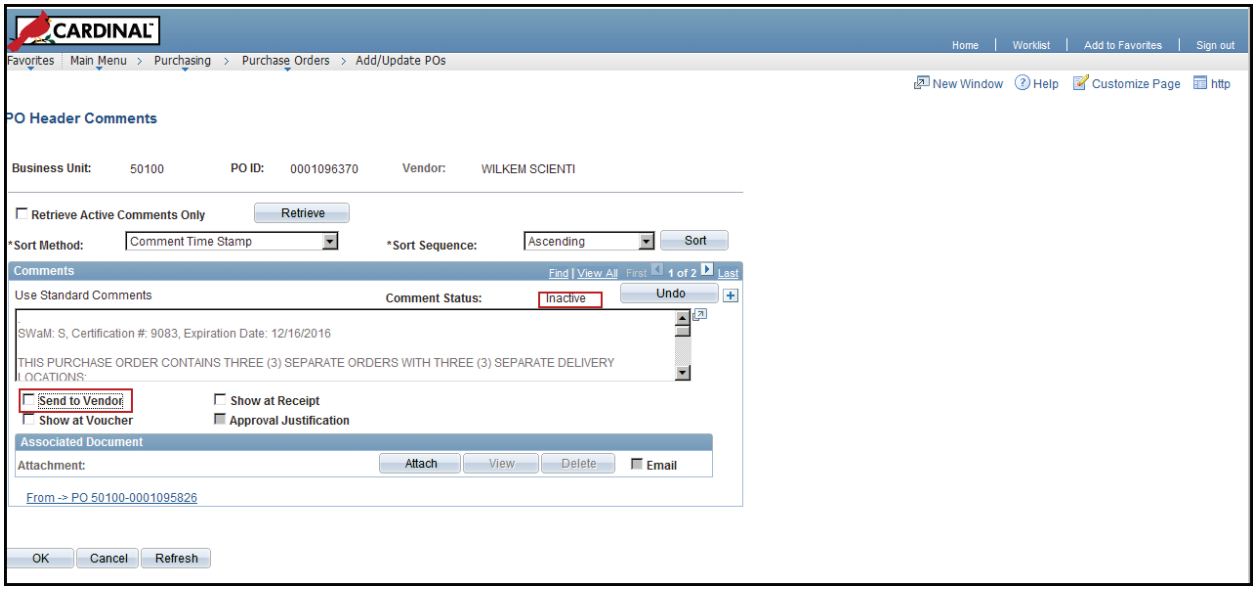
The following will automatically cancel an eVA order and create a new eVA order.

- A change to the Bill To Address
- A change to a different address location for the same vendor

PO Comments:

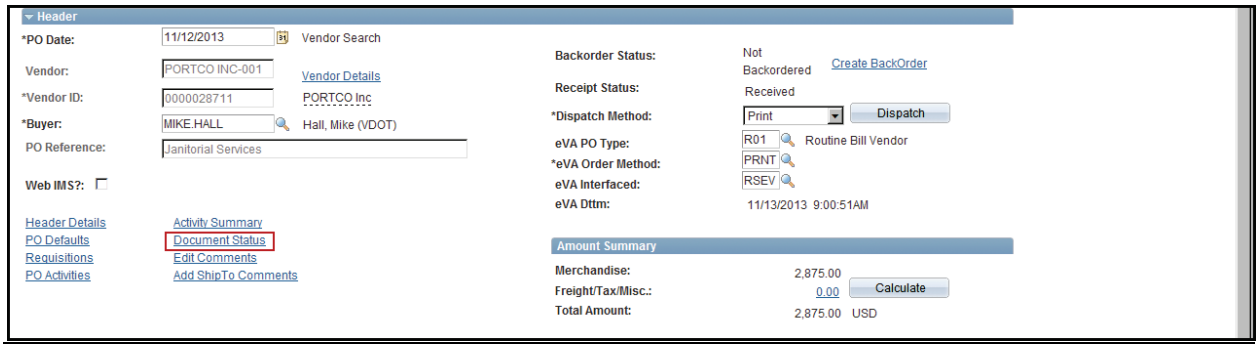


- Check **Send to Vendor** box for comments to print on the PO.



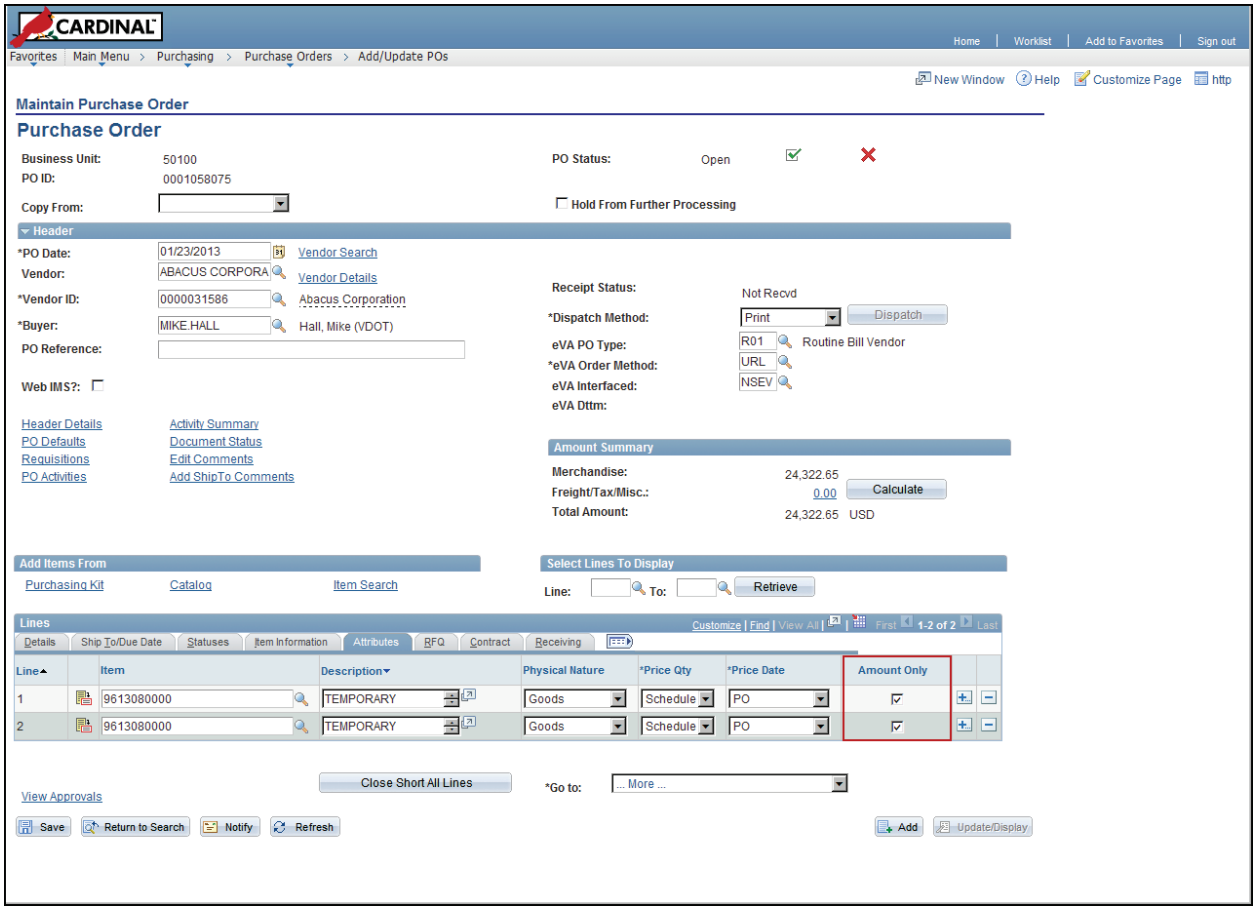
- Uncheck any **Inactive Comments** or other comments that you do not want to print to PO.

Related Documents:

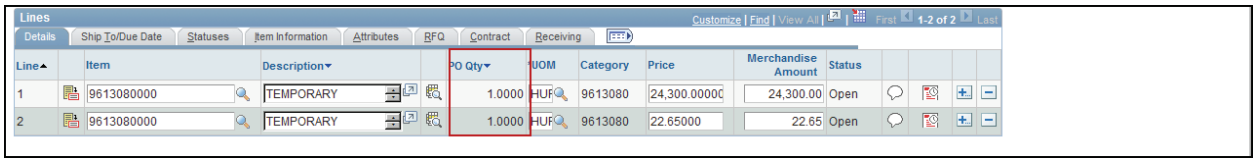


- Click on the **Document Status** hyperlink to view all related documents; i.e. Requisitions, Strategic Sourcing Events, Receivers, Vouchers & Payments.

Amount Only:



- Checking the **Amount Only** box from the **Attributes** tab allows Buyers to create PO lines by dollar amount only.



- The quantity will default as 1. The Buyer may enter any price, where receiving is based upon invoice amounts only.

For Example: Purchasing by Quantity would be ordering 10 tons of salt. The Buyer would order by Quantity, where the price per ton is fixed. Receiving is counted as the items are delivered and paid for by the ton. Purchasing by Amount might be a year of consultant services, where each week the invoice value differs. The PO quantity is locked down at 1 and the total dollar value is entered. The weekly invoice is received by dollar amount and the voucher payment is made to match those dollar values.