

Purchase Orders Overview

A purchase order (PO) is a document an agency uses to execute a purchase transaction with a contractor (supplier). Cardinal tracks VDOT supplier payments for goods and services against a PO. You can create POs from a strategic sourcing event, contract, requisition, or ad-hoc. Cardinal sends POs electronically to Virginia's online electronic procurement system (eVA). eVA sends a confirming order to the supplier.

For more information on how to create, maintain, modify (change orders), reconcile/close, and review POs please refer to the course entitled **PR344: Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Training**.

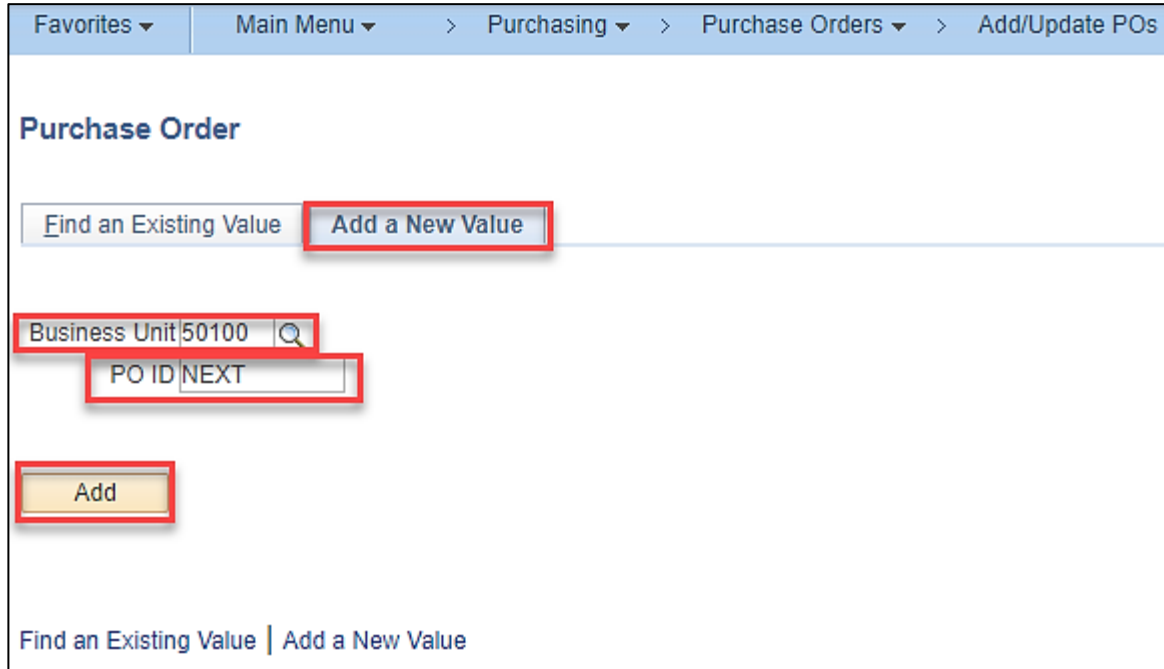
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Create a New Purchase Order (PO): Beginning Steps for All POs

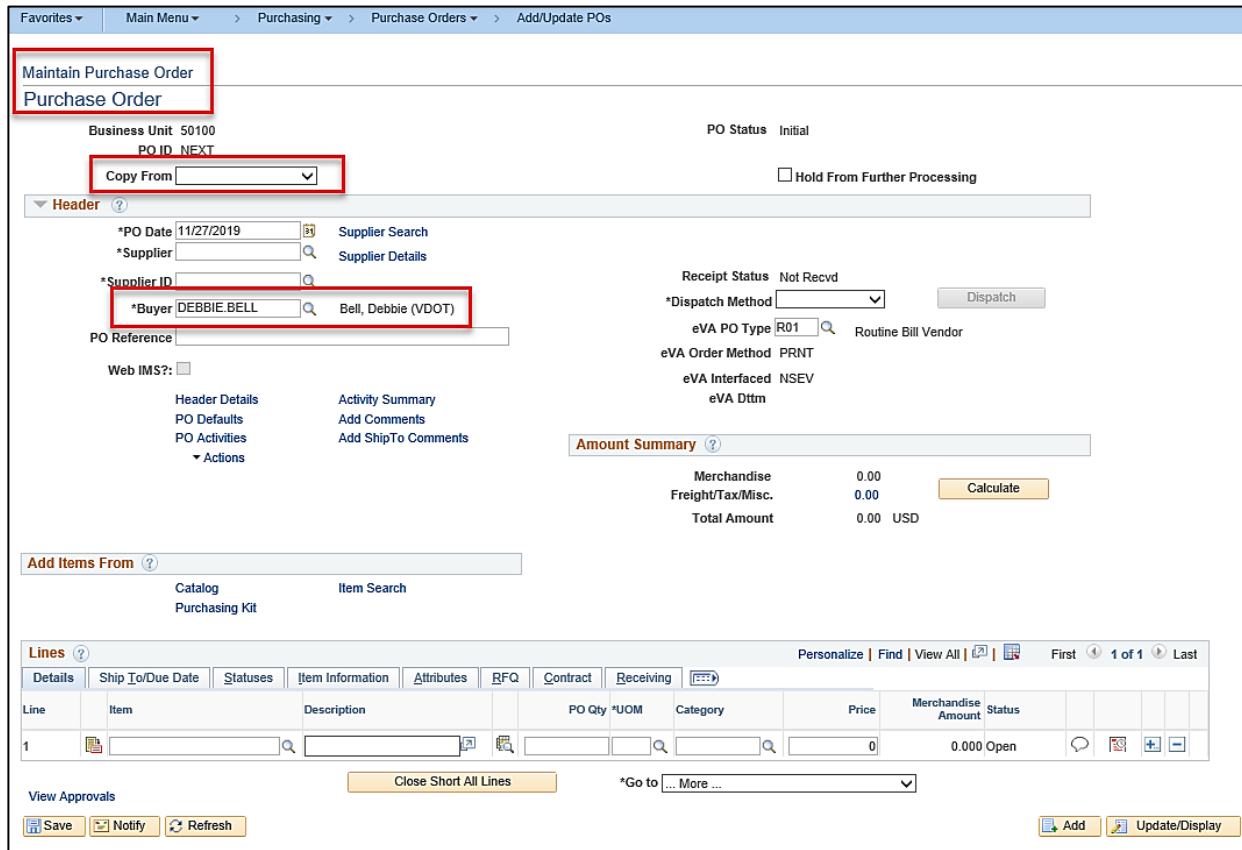
1. Navigate to the **Purchase Order** search page using the following path:

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



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

Create a PO (All Items) from a Contract



Business Unit 50100 PO ID NEXT

PO Status Initial

Copy From

☐ Hold From Further Processing

Header ?

*PO Date 11/27/2019 Supplier Search

*Supplier Supplier Details

*Supplier ID

*Buyer DEBBIE.BELL Bell, Debbie (VDOT)

PO Reference

Web IMS?: ☐

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

Receipt Status Not Recvd

*Dispatch Method 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 ?

Catalog Item Search

Lines ?

Personalize | Find | View All | First Last

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

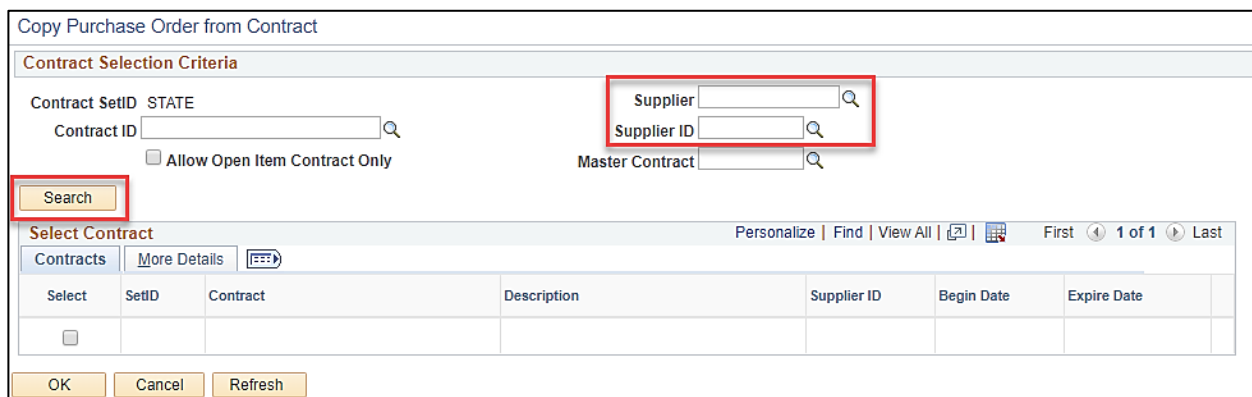
View Approvals

Close Short All Lines

*Go to ... More ...

Save Notify Refresh Add Update/Display

- Follow steps 1-3 from the [Create a New Purchase Order \(PO\): Beginning Steps for All POs](#) section of this job aid.
- Click the **Copy From** drop-down arrow and select **Contract**. The **Copy Purchase Order from Contract** pop-up window displays.



Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID STATE

Contract ID

☐ Allow Open Item Contract Only

Supplier

Supplier ID

Master Contract

Search

Select Contract

Personalize | Find | View All | First Last

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>						

OK Cancel Refresh

- Enter the **Supplier** or **Supplier ID**. You can use the magnifying glass icons to search.
- Click the **Search** button to initiate the search for contracts related to the selected supplier.

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID STATE
 Contract ID
☐ Allow Open Item Contract Only

Supplier
 Supplier ID
 Master Contract

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

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>	STATE	0000000000000000000044505	Overhead Door Repairs, Replace	0000001048	01/07/2016	01/07/2020

- All contracts for the selected supplier display as shown.
- Click the **Select** check-box to the left of the desired **Contract** to copy from this contract.
- Click the **OK** button. The **Purchase Order** page with all contract items copied in displays.

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

Maintain Purchase Order

Purchase Order

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

▼ Header ?

*PO Date 11/13/2019 Supplier Search
 *Supplier PIEDMONT D-001 ☒ **Supplier Details**
 *Supplier ID 0000001048 Piedmont Door Service LLC
 *Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)
 PO Reference Overhead Door Repairs, Replace
 Web IMS?: ☐
 Header Details Activity Summary
 PO Defaults Edit Comments
 PO Activities Add ShipTo Comments
 ▼ Actions

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	75,586.99	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00	
Total Amount	75,586.99 USD	

Add Items From ?

Catalog Purchasing Kit Item Search

Lines ? Personalize | Find | View All | First 1-5 of 5 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	9105501000	OVERHEAD DOOR	1.0000	HUR	9105501	187.84000	187.84	Open
2	9105501000	OVERHEAD DOOR	1.0000	HUR	9105501	46.95000	46.95	Open

- Click the **Supplier Details** hyperlink to verify the supplier address for the purchase order.

PO Supplier Information

Maintain Purchase Order

Supplier Details -- Piedmont Door Service LLC

Business Unit 50100

PO ID NEXT

Supplier PIEDMONT D-001

*Location MAIN

*Address 4

Contact

Salesperson

Show Address Details

Show Contact Details

Show Salesperson Details

Supplier Information

Terms 30 Net 30

Basis Date Type Prompt Payment

Supplier Details Message

Country USA United States

Address 1 8491 White Shop Road

Address 2

eVA VLIN VA10045290

eVA Address ID EVAAD78330

City Culpeper

County 825559529

State VA Virginia

Prefix

Fax 768/141-0007

Prefix 1

Phone 113/988-8061

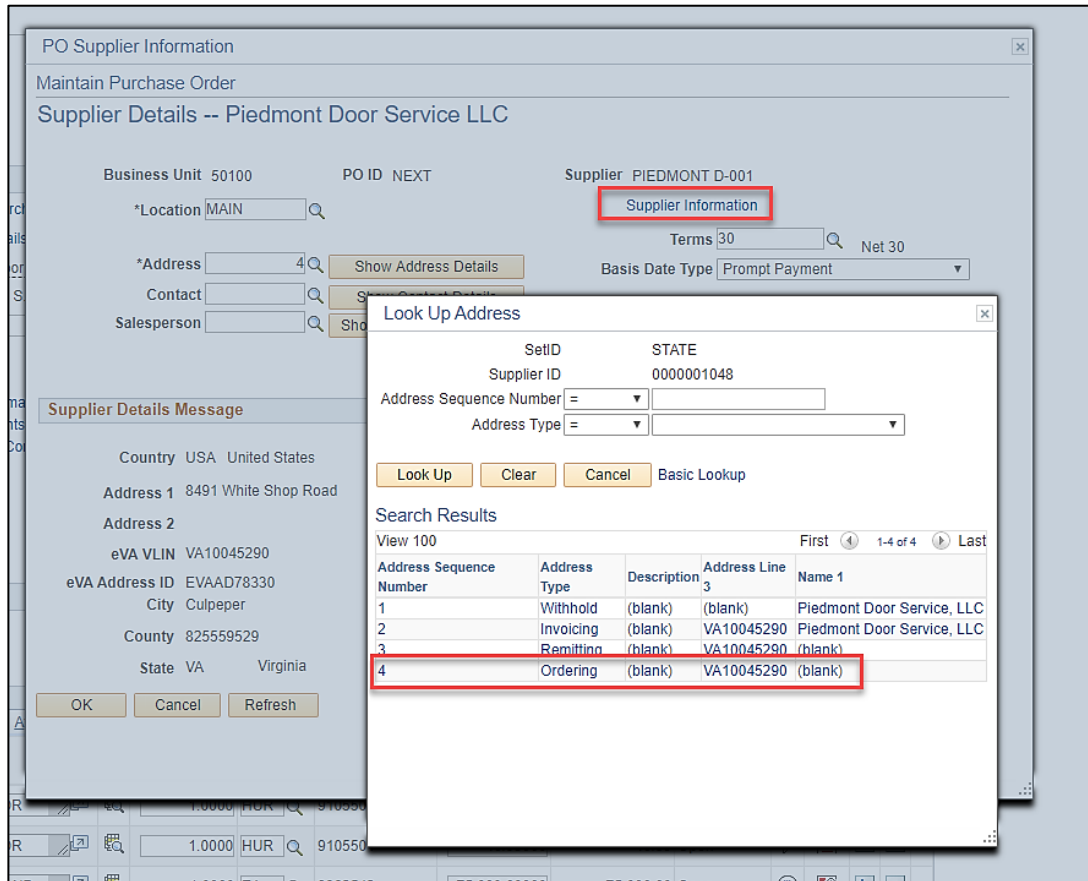
Postal 22701

OK

Cancel

Refresh

9. The default order address displays in the **Supplier Details** pop-up window.
10. The eVA Supplier Location ID # (**eVA VLIN**), related to the chosen address, also displays.
11. To select a different address, click the **Look up Address** magnifying glass icon.



PO Supplier Information

Maintain Purchase Order

Supplier Details -- Piedmont Door Service LLC

Business Unit 50100 PO ID NEXT Supplier PIEDMONT D-001

*Location MAIN **Supplier Information**

Terms 30 Net 30

*Address 4 Basis Date Type Prompt Payment

Contact

Salesperson

Supplier Details Message

Country USA United States

Address 1 8491 White Shop Road

Address 2

eVA VLIN VA10045290

eVA Address ID EVAAD78330

City Culpeper

County 825559529

State VA Virginia

Look Up Address

SetID STATE

Supplier ID 0000001048

Address Sequence Number =

Address Type =

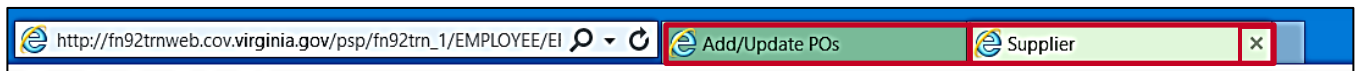
Basic Lookup


Search Results

View 100 First 1-4 of 4 Last

Address Sequence Number	Address Type	Description	Address Line 3	Name 1
1	Withhold	(blank)	(blank)	Piedmont Door Service, LLC
2	Invoicing	(blank)	VA10045290	Piedmont Door Service, LLC
3	Remitting	(blank)	VA10045290	(blank)
4	Ordering	(blank)	VA10045290	(blank)

12. Click the **Address Sequence Number** related to the address you wish to select.
13. On the **Supplier Details – XXX** pop-up window be sure to click the **OK** button once you have made your changes. The window will close and you will be back on the **Purchase Order** page.
14. However, if you need additional supplier details, click the **Supplier Information** hyperlink.



15. 
16. A new internet browser window, entitled **Supplier**, opens. The **Identifying Information** tab displays. You may navigate back and forth between windows. For more details, refer to the [Helpful Hints](#) section of this job aid.
17. After reviewing the additional supplier details, close the **Supplier** internet browser tab by clicking the **X**.
18. Select the internet browser tab **Add/Update POs** window which displays the **Supplier Details – XXXXX** page. If you previously made changes on the **Supplier Details – XXXXX** page and have not yet clicked the **OK** button to save the changes, be sure to click the **OK** button now. You will return to A

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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Initial

PO ID NEXT

Copy From ▾ ☐ Hold From Further Processing

▾ Header ?
 *PO Date 11/13/2019 Supplier Search
 *Supplier Supplier Details
 *Supplier ID
 *Buyer
 PO Reference
 Web IMS? ☐

Receipt Status Not Recvd
 *Dispatch Method
 eVA PO Type R01 Routine Bill Vendor
 *eVA Order Method PRINT
 eVA Interfaced NSEV
 eVA Dttm

Header Details
 PO Defaults
 PO Activities
 Actions

Activity Summary
 Add Comments
 Add Ship To Comments

Amount Summary ?

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

Add Items From ?

Catalog Item Search

Purchasing Kit

Lines ?
 Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving (FF) Personalize Find View All 1 of 1 First 1 of 1 Last

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

19. Click the **Header Details** hyperlink.

PO Header Details

PO Details

Supplier PIEDMONT D-001 PO Date 11/13/2019

*PO Type GEN

*Billing Location CNTRL OF Billing Address

☒ Tax Exempt
 ID 546001730
 Letter of Credit ID
 Ship To CULPPR DIS

Origin ONL Online
☐ Use One Ship To

Currency

Currency Code USD Exchange Rate Detail
 Rate Date 11/13/2019 Base Currency USD
 Rate Type CRRNT Exchange Rate 1.00000000

Process Control Option

☒ Dispatch Acknowledgements required for Not required
 *Method Print

OK Cancel Refresh

20. The **PO Header Details** pop-up window displays. Click the **Look up Billing Location** magnifying glass icon and select the **Location Code** for your **Billing Location**.

21. Click the OK button. The Maintain Purchase Order – Purchase Order page displays.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID NEXT PO Status Initial
 Copy From ▾ ☐ Hold From Further Processing

Header ?
 *PO Date 11/13/2019 Supplier Search
 *Supplier Supplier Details
 *Supplier ID
 *Buyer
 PO Reference
 Web IMS?: ☐

Receipt Status Not Recvd
 *Dispatch Method ▾ Dispatch
 eVA PO Type R01 Routine Bill Vendor
 *eVA Order Method PRNT
 eVA Interfaced NSEV
 eVA Dtm

Header Details
PO Defaults
 PO Activities
 ▾ Actions

Activity Summary
 Add Comments
 Add Ship To Comments

Amount Summary ?
 Merchandise 0.00
 Freight/Tax/Misc. 0.00 Calculate
 Total Amount 0.00 USD

Add Items From ?
 Catalog Item Search
 Purchasing Kit

Lines ?
 Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All 1 of 1 First 1 of 1 Last

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

22. Click the **PO Defaults** hyperlink to make global changes to the header and accounting distribution field values for all lines. The **Maintain Purchase Order – Purchase Order Defaults** pop-up window displays.

Purchase Order Defaults

Business Unit 50100 PO ID NEXT Supplier PIEDMONT D-001

Default Options ?

☐ Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category Unit of Measure

Schedule

Ship To CULPPR DIS Culpeper District Ultimate Use Code

Due Date Original Promise Date

Ship Via COMMON Freight Terms Code FOB DEST

Arbitration Freight Charge Method

*Distribute By Quantity One Time Address

Distribution

SpeedChart

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

Chartfields Asset Information

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	<input type="text"/>	50100 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	10141 <input type="text"/>	<input type="text"/>

OK Cancel Refresh

23. In the **Default Options** section, select **Override** to ensure that all distribution lines are updated with the information you enter next.
24. Using the **Look up Ship To** magnifying glass icon, select the required **Ship To** location.
25. In the **Distributions** section – **Chartfields** tab, enter the accounting distribution you wish to be applied to all distribution lines. If each distribution line will be different, you will use a different process which is documented later.
26. Click the **OK** button. The Retrofit field changes to “all” existing PO lines/schedules/distributions..... pop-up window displays.

PO Default Retrofit

Maintain Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....



Business Unit 50100

PO ID NEXT

Supplier PIEDMONT D-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
Select 'Apply to All Distributions' to apply changes to all distribution lines on the PO.

Retrofit Field Selection

Personalize | Find | View All |  

First 1-6 of 6 Last

Apply	Distrib Line	Field Name	Field Value	Header field values	Apply to All Distributions
<input checked="" type="checkbox"/>		Ship To	CULPPR DIS	Header field values	
<input checked="" type="checkbox"/>		Ship Via	COMMON		
<input checked="" type="checkbox"/>		Freight Terms Code	FOB DEST	Accounting Chartfield Values	
<input type="checkbox"/>	1	GL Unit	50100		<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Department	10141		<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Location	CULPPR DIS		<input checked="" type="checkbox"/>

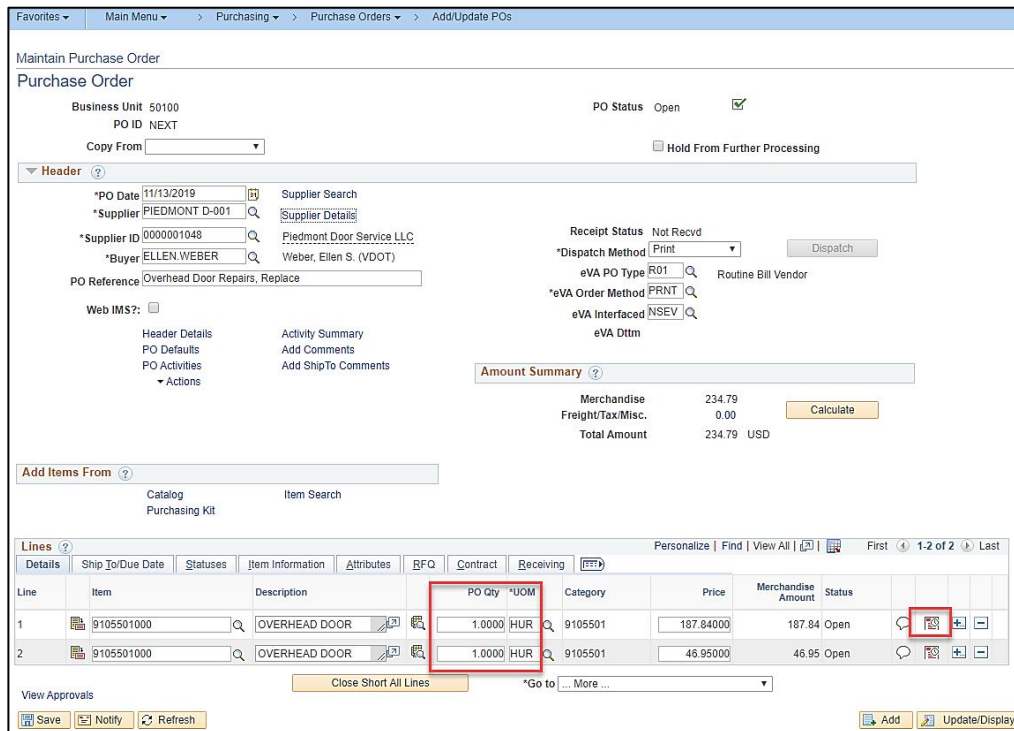
☒ Select All
☐ Clear All

OK

Cancel

Refresh

27. To the left of the header field values you are updating, select/click the **Apply** check-box.
28. To the right of the accounting ChartField values, select/click the check-boxes **Apply to All Distributions**, to ensure all the accounting distribution lines are updated with the new values from the prior page.
Do not select the check-box to the left of the **Field Name Pct**.
29. Click the **OK** button. The **Purchase Order** page displays.



Business Unit 50100 PO ID NEXT PO Status Open

Copy From [] Hold From Further Processing

Header

*PO Date 11/13/2019 Supplier Search
 *Supplier PIEDMONT D-001 Supplier Details
 *Supplier ID 0000001048 Piedmont Door Service LLC
 *Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)
 PO Reference Overhead Door Repairs, Replace

Web IMS? ☐

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Actions

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	234.79
Freight/Tax/Misc.	0.00
Total Amount	234.79 USD

Calculate

Add Items From

Catalog Purchasing Kit

Lines

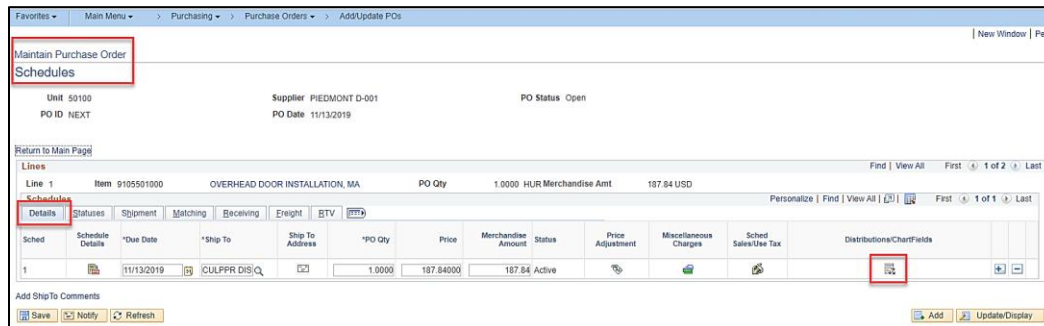
Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	9105501000	OVERHEAD DOOR	1.0000	HUR	9105501	187.84000	187.84	Open
2	9105501000	OVERHEAD DOOR	1.0000	HUR	9105501	46.95000	46.95	Open

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

Save Notify Refresh Add Update/Display

30. Enter the PO quantity (**PO Qty**) for each line.

31. To enter a different accounting distribution for a line, from the **Details** tab, click the **Schedule** icon on the desired line. The **Schedules** page for that line displays.



Maintain Purchase Order Schedules

Unit 50100 Supplier PIEDMONT D-001 PO Status Open
 PO ID NEXT PO Date 11/13/2019

Return to Main Page

Lines

Line	Item	Description	PO Qty	UOM	Merchandise Amt
Line 1	9105501000	OVERHEAD DOOR INSTALLATION, MA	1.0000	HUR	187.84 USD

Details Schedules Shipment Matching Receiving Freight BTW

Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Tax	Distributions/ChartFields
1		11/13/2019	CULPRR DIS		1.0000	187.84000	187.84	Active				

Add ShipTo Comments

Save Notify Refresh Add Update/Display

32. From the **Details** tab, click the **Distribution/ChartFields** icon. The **Distributions for Schedule X** pop-up window displays.

Distributions for Schedule 1

Unit 50100 Supplier PIEMONT D-001
PO ID NEXT Item 9105501000 OVERHEAD DOOR INSTALLATION, MA
Line 1
Schedule 1 Status Active

*Distribute By Quantity

Schedule Qty 1.0000
Merchandise Amount 180.00 USD
Doc. Base Amount 180.00 USD

SpeedChart Multi-SpeedCharts

Distribution Personalize Find View All First 1 of 1 Last

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	1.0000	180.00	USD	40900		5012570	01000	506004	40900

OK Cancel Refresh

33. Verify or update the accounting distribution.

34. Click the **OK** button. The **Maintain Purchase Orders – Schedules** page displays.

Maintain Purchase Order Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Open
PO ID NEXT PO Date 11/13/2019

[Return to Main Page](#)

Lines Find View All First 1 of 3 Last

Line	Item	STONERIP RAP CLASS AI	PO Qty	100.0000	LTN Merchandise Amt	3,148.00	USD
1	7503551310						

Schedules Personalize Find View All First 1 of 1 Last

Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Use Tax	Distributions/ChartFields
1		11/13/2019	CNTRL OFT		100.0000	31.48000	3,148.00	Active				

Add Ship To Comments

Save Notify Refresh Add Update/Display

35. Click the **Return to Main Page** hyperlink. The **Purchase Order** page displays.

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open ☒

PO ID NEXT

Copy From

Header

*PO Date 11/13/2019 Supplier Search
*Supplier PIEMONT D-001 Supplier Details
*Supplier ID 0000001048 Piedmont Door Service LLC
*Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

PO Reference

Web IMS? ☐

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add Ship To Comments
Actions

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

Amount Summary

Merchandise	180.00
Freight/Tax/Misc.	0.00
Total Amount	180.00 USD

Calculate

Add Items From Catalog Purchasing Kit Item Search

Lines Personalize Find View All First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	9105501000	OVERHEAD DOOR	1.0000	HUR	9105501	180.00000	180.00	Open

View Approvals

Save Notify Refresh Add Update/Display

36. Click the **Save** button. Cardinal assigns the **PO ID** number when you successfully save the PO.

37. Click the green **Submit for Approval** check mark.

Favorites ▾ Main Menu ▾ ▸ Purchasing ▾ ▸ Purchase Orders ▾ ▸ Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 0001201105

Copy From ▾ ☐ Hold From Further Processing

PO Status **Pend Appr** ✖

Header ?

*PO Date 11/13/2019 Supplier Search
 *Supplier PIEDMONT D-001 Supplier Details
 *Supplier ID 0000001048 Piedmont Door Service LLC
 *Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

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

PO Reference

Web IMS?: ☐

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add Ship To Comments
 Actions

Amount Summary ?

Merchandise	180.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	180.00 USD	

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

Details Ship To/Due Date Statuses Item Information Attributes BFQ Contract Receiving **PTF** Personalize Find View All First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	9105501000	OVERHEAD DOOR	1.0000	HUR	9105501	180.00000	180.00	Pending

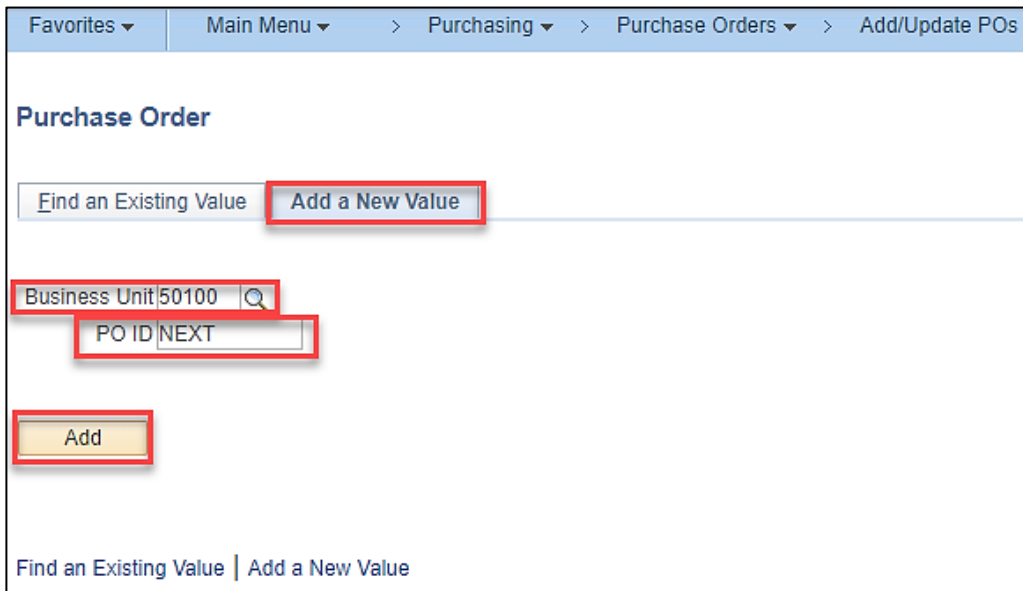
View Approvals

Close Short All Lines *Go to More ▾

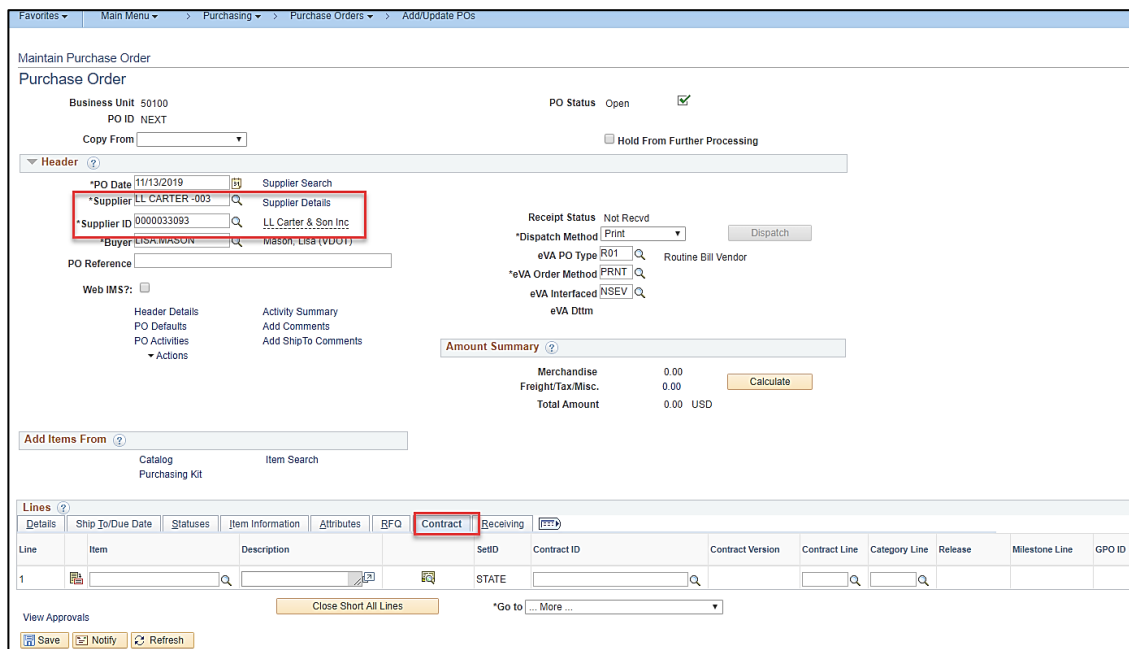
Save Notify Refresh Add Update/Display

38. The green checkmark will disappear and **PO Status** changes to **Pend Appr**. Your supervisor will be notified of the pending approval via email and their worklist.

Create a PO (1 Item/Line) from a Contract



1. Repeat steps 1-3 from the [Create a New Purchase Order \(PO\): Beginning Steps for All POs](#) section of this job aid.



2. Enter the **Supplier** or **Supplier ID**. You can use the magnifying glass icons to search.
3. Click the **Contract** tab.

Add Items From ?

Catalog

Item Search

Purchasing Kit

Lines ?

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

???)

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release	Milestone Line	GPO ID
1	 <input type="text" value=""/>	<input type="text" value=""/>		STATE <input type="text" value=""/>		<input type="text" value=""/>	<input type="text" value=""/>			

View Approvals

Close Short All Lines

*Go to ... More ...

Save

Notify

Refresh

4. Click the **Contract Search** icon. The **Contract Search** pop-up window displays.

Maintain Purchase Order

Purchase Order

Contract Search

Help

Search Criteria

SetID STATE

Contract ID 00000000000000000000000044966

Contract Style

Contract Process Option

Description

Master Contract ID

Contract Reference Type

PO Date 12/22/2016

Supplier SetID STATE

Supplier ID 0000033093 LL Carter & Son Inc

Item SetID STATE

Item ID

Item Description

Category

Corporate Contract

Search

Clear

Contract Details

OK

Cancel

Refresh

5. Enter a specific **Contract ID** number, or use magnifying glass icon if necessary.
6. Click the **Search** button to initiate the search for lines related to the selected contract.

Contract Search

Search Criteria

SetID STATE Contract ID <input type="text" value="0000000000000000000047653"/> 🔍 Contract Style <input type="text"/> 🔍 Contract Process Option <input type="button" value="▼"/> Administrator/Buyer <input type="text"/> 🔍 Description <input type="text"/> Master Contract ID <input type="text"/> 🔍 Contract Reference Type <input type="button" value="▼"/> Corporate Contract <input type="button" value="▼"/> PO Date 11/13/2019	Supplier SetID STATE Supplier ID 0000033093 LL Carter & Son Inc Item SetID STATE Item ID <input type="text"/> 🔍 Item Description <input type="text"/> Category <input type="text"/> 🔍 Manufacturer ID <input type="text"/> 🔍 Manufacturer's Item ID <input type="text"/> 🔍 Supplier Item ID <input type="text"/> UPN ID <input type="text"/> 🔍
--	---

▼ Contract Details Personalize | Find | View All | 📄 🖨️ First 1-10 of 18 Last

Item Detail **Contract Reference** **Contract Detail** **Item Information** ⓘ

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price	
<input type="checkbox"/>	000000000000000000000047653	1	Line Item	7503551	7503551310	STONE RIP RAP CLASS AI	31.48000	Y	🗑️
<input type="checkbox"/>	000000000000000000000047653	1	Line Item	7503532	7503532225	STONE NO. 68, STONE	29.24000	Y	🗑️

- The **Item Detail** tab displays and contains **Contract ID**, **Item Description**, and **Contract Base Price** for each line of the selected contract.
- Click the **Contract Reference** tab.

Contract Search

Search Criteria

SetID STATE
Contract ID 00000000000000000000000047653
Contract Style
Contract Process Option
Administrator/Buyer
Description
Master Contract ID
Contract Reference Type
Corporate Contract
PO Date 11/13/2019

Supplier SetID STATE
Supplier ID 0000033093 LL Carter & Son Inc
Item SetID STATE
Item ID
Item Description
Category
Manufacturer ID
Manufacturer's Item ID
Supplier Item ID
UPN ID

Search

Clear

Contract Details

Personalize | Find | View All | First 1-10 of 18 Last

Item Detail Contract Reference Contract Detail Item Information

Select	Contract ID	Contract Version	Contract Line Number	Category Line Number	Remaining Quantity	Unit of Measure	Contract Reference Type	Remaining Line Amount	Currency
<input checked="" type="checkbox"/>	00000000000000000000000047653	1	1			N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000047653	1	2			N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000047653	1	3			N/A LTN	Line Item	N/A USD	

OK

Cancel

Refresh

- Each unique contract **Item Line Number** displays for the selected contract.
- Click the **Select** check-box for the line you wish to copy. You may repeat the copy steps to copy more lines.
- Click the OK button. The Maintain Purchase Order – Purchase Order page displays.

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

Copy From [] [x] Hold From Further Processing

▼ Header ?

*PO Date 11/13/2019	Supplier Search
*Supplier LL CARTER -003	Supplier Details
*Supplier ID 0000033093	LL Carter & Son Inc
*Buyer LISA MASON	Mason, Lisa (VDOT)

PO Reference Delivered Stone Fredericksburg

Web IMS?: ☐

- Header Details
- PO Defaults
- PO Activities
- Actions

- Activity Summary
- Add Comments
- Add ShipTo Comments

Receipt Status Net Recvd

*Dispatch Method PRINT Print Dispatch

eVA PO Type R01 Routine BII Vendor

*eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dttm

Amount Summary ?

Merchandise	4,386.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	4,386.00 USD	

Add Items From ?

Catalog
Item Search

Purchasing Kit

Lines ?

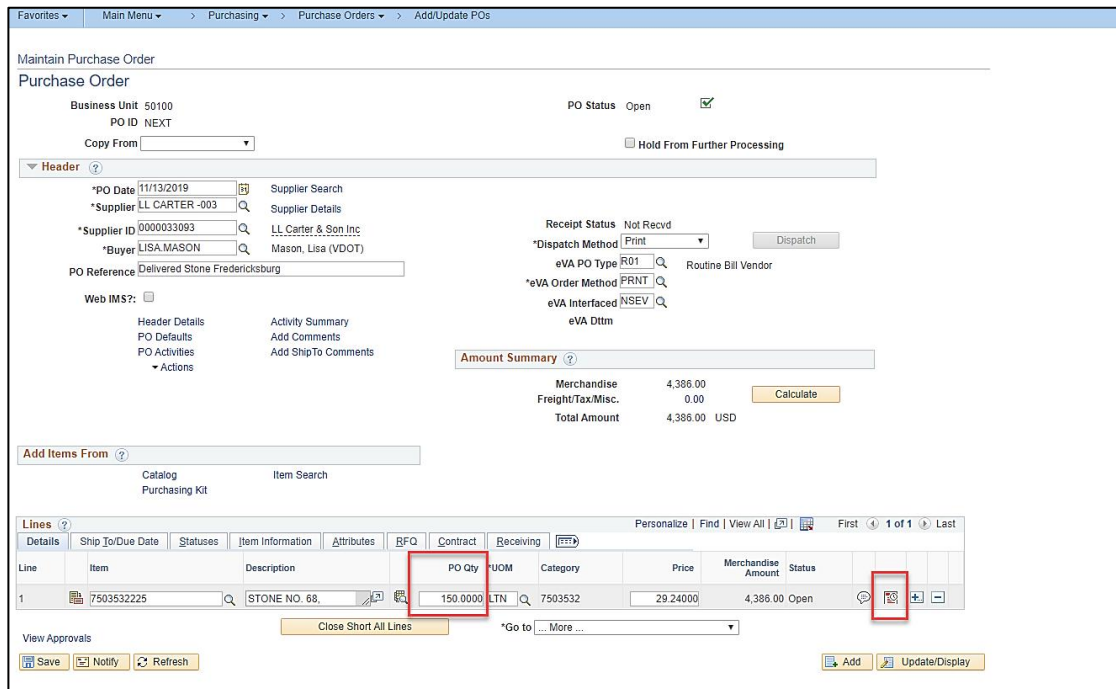
Details | Ship To/Due Date | Statuses | Item Information | Attributes | BFO | **Contract** | Receiving | PDF

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release
1	75031532225	STONE NO. 68	STATE	0000000000000000000000047653		1	2	

View Approvals Close Short All Lines Go to More

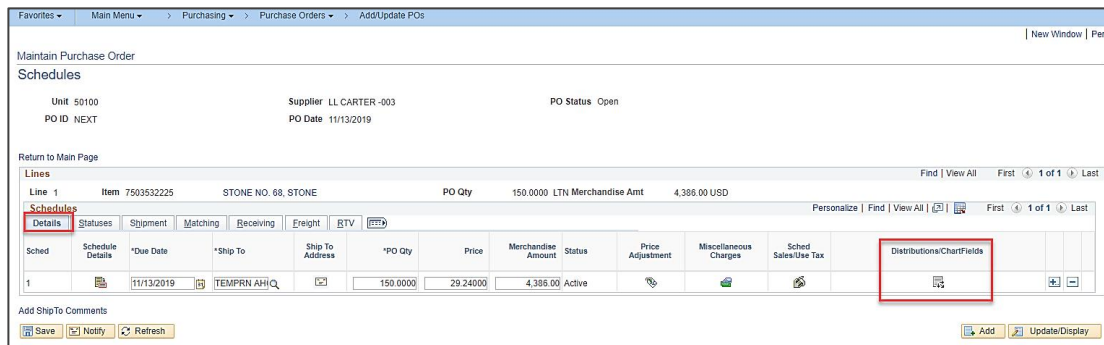
[Save] [Notify] Refresh

12. On the **Contract** tab you see that the **Line** you selected from the contract has populated your PO.
13. Click the **Details** tab.



14. On the **Details** tab, enter the **PO Qty** (quantity) desired for this PO.

15. Click the Schedule icon. The Maintain Purchase Order – Schedules page displays.



16. From the Details tab on the Maintain Purchase Order – Schedules page, click the Distribution icon. The Maintain Purchase Order – Distributions for Schedule X pop-up window displays.

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003
 PO ID NEXT Item 7503532225 STONE NO. 68, STONE
 Line 1
 Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 150.0000
 Merchandise Amount 4,386.00 USD
 Doc. Base Amount 4,386.00 USD

Distribution Personalize Find View All First 1 of 1 Last

Chartfields Details/Tax Asset Information Req Detail Statuses

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	150.0000	4,386.00	USD	50100		5013560	04100	604003	16012

OK Cancel Refresh

- On the **Chartfields** tab enter the valid chart of accounts values. A **Schedule** may have one or more ChartField distributions. ChartField values identify the accounting distribution. The insertion of valid **Account, Department, Cost Center, or Project** values is required. You can manually enter a ChartField value, or you may use the **Multi-SpeedCharts** hyperlink to select a **SpeedChart** value to automatically populate some of the ChartField values for you.
- You may insert, or delete, additional accounting distributions, by scrolling right and clicking on the (+)/(-) icons at the end of the accounting distribution line.
- Click the **OK** button. You will return to the **Maintain Purchase Order – Schedules** page.

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003
 PO ID NEXT Item 7503532225 STONE NO. 68, STONE
 Line 1
 Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 150.0000
 Merchandise Amount 4,386.00 USD
 Doc. Base Amount 4,386.00 USD

Distribution Personalize Find View All First 1 of 1 Last

Chartfields Details/Tax Asset Information Req Detail Statuses

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	150.0000	4,386.00	USD	50100		5013560	04100	604003	16012

OK Cancel Refresh

- Click the Return to Main Page hyperlink. The Maintain Purchase Order – Purchase Order page displays.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 0001201106 PO Status Open ☒ ☐

Copy From ☐ Hold From Further Processing

▼ Header ?

*PO Date 11/13/2019 Supplier Search
 *Supplier LL CARTER -003 Supplier Details
 *Supplier ID 0000033093 LL Carter & Son Inc.
 *Buyer LISA MASON Mason, Lisa (VDOT)
 PO Reference Delivered Stone Fredericksburg

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

Web IMS?: ☐
 Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Requisitions Document Status
 Actions

Amount Summary ?

Merchandise	1,608,200.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	1,608,200.00 USD	

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 ☒

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503532225	STONE NO. 68.	55000.0000	LTN	7503532	29.24000	1,608,200.00	Open

View Approvals

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

Save Return to Search Notify Refresh Add Update/Display

21. Click the **Save** button.
22. Cardinal assigns a **PO ID** number upon save.
23. Click the PO **Submit for Approval** check-box (the green checkmark) which is next to the **PO Status** field, to send it forward for approval by your supervisor.

Procurement Job Aid

501 PR344: Purchase Orders

Maintain Purchase Order

Purchase Order

Business Unit 50100
PO ID 0001201106

Copy From

Header

*PO Date 11/13/2019 Supplier Search
*Supplier LL CARTER -003 Supplier Details
*Supplier ID 0000033093 LL Carter & Son Inc
*Buyer LISA.MASON Mason, Lisa (VDOT)

PO Reference Delivered Stone Fredericksburg

Web IMS?: ☐

Header Details
PO Defaults
PO Activities
Requisitions
▼ Actions

Activity Summary
Add Comments
Add ShipTo Comments
Document Status

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

Amount Summary

Merchandise	1,608,200.00	
Freight/Tax/Misc.	0.00	
Total Amount	1,608,200.00	USD

Calculate

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

Personalize | Find | View All | First 1 of 1 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	7503532225	STONE NO. 68.	55000.0000	LTN	7503532	29.24000	1,608,200.00	Pending				

View Approvals

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

Save Return to Search Notify Refresh Add Update/Display

24. The **PO Status** changes to **Pend Appr** (i.e., pending approval) and your supervisor is notified via email and worklist.
25. Click the **View Approvals** hyperlink to view the pending and completed approval actions.
26. Example of email:

From: FINSIST@covtest.virginia.gov
To: Mike Hall (VOCOT)
Cc:
Subject: PO ID "0001096992" Business Unit "VA Dept of Transportation" Has Been "Approved"

The following purchase order has been "Approved".

Business Unit: VA Dept of Transportation
PO ID: 0001096992
PO Reference:
PO Date: 2014-05-23
Buyer: MIKE.HALL

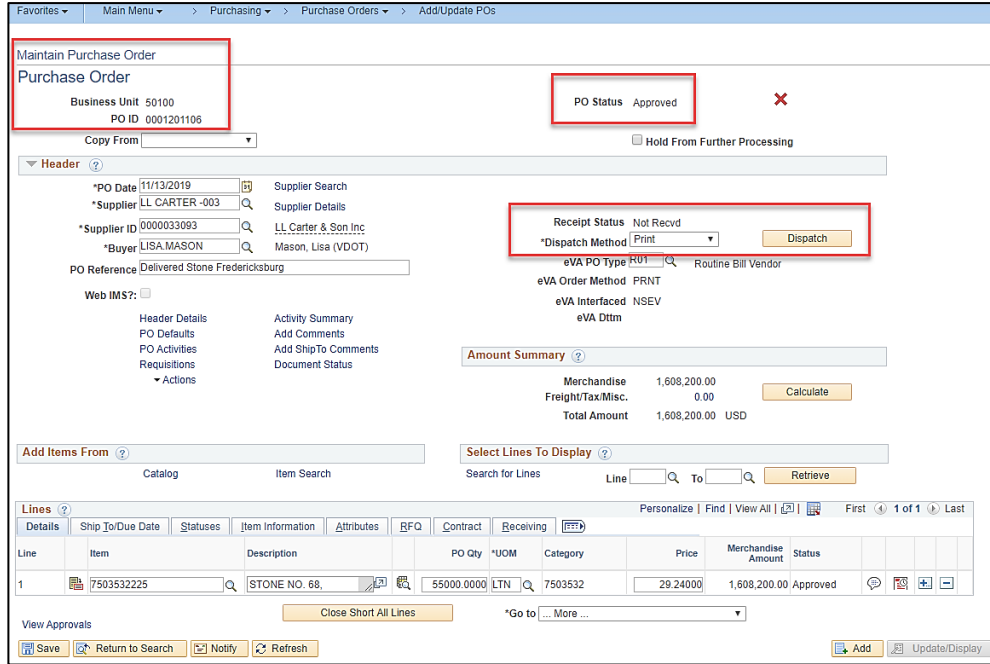
You can navigate directly to the approval page by clicking the link below.

https://finsistweb.covtest.virginia.gov/psp/finsist/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS_PO_APPROVAL.GBL?Page=PO_APPROVAL&Action=USBUSINESS_UNIT-50108&PO_ID=0001096992

- ### 27. Example of worklist:

Favorites	Main Menu	Worklist	Worklist
Worklist			
Worklist for SHEILA GODWIN: Godwin, Sheila (VDOT)			
Detail View	Worklist Filters [] Feed -		
Worklist Items	Date From	Work Item	Worked By Activity
Control-M Batch User PR Team	08/07/2019	Contract Thresholds	Expiring Contracts / Max \$
Control-M Batch User PR Team	08/07/2019	Contract Thresholds	Expiring Contracts / Max \$
Control-M Batch User PR Team	08/07/2019	Contract Thresholds	Expiring Contracts / Max \$
Control-M Batch User PR Team	08/07/2019	Contract Thresholds	Expiring Contracts / Max \$
Control-M Batch User PR Team	08/07/2019	Contract Thresholds	Expiring Contracts / Max \$
Mason, Lisa (VDOT)	11/14/2019	Approval Routing	Approval Workflow

28. Upon approval, the Buyer receives an email and can navigate to the PO from the hyperlink. Once approved, the PO is ready to be dispatched. POs are dispatched automatically in batch periodically throughout the day, or the Buyer may choose to dispatch it manually.



Maintain Purchase Order
Purchase Order

Business Unit 50100
PO ID 0001201106

Copy From []

PO Status Approved

☐ Hold From Further Processing

Header

*PO Date 11/13/2019
*Supplier LL CARTER -003
*Supplier ID 0000033093
*Buyer LISA.MASON
PO Reference Delivered Stone Fredericksburg

Supplier Search
Supplier Details
LL Carter & Son Inc
Mason, Lisa (VDOT)

Web IMS? ☐

Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Add Comments
Add ShipTo Comments
Document Status

Receipt Status Not Recvd
*Dispatch Method Print
eVA PO Type R01
eVA Order Method PRNT
eVA Interfaced NSEV
eVA Dttm

Dispatch

Amount Summary

Merchandise 1,608,200.00
Freight/Tax/Misc. 0.00
Total Amount 1,608,200.00 USD

Calculate

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

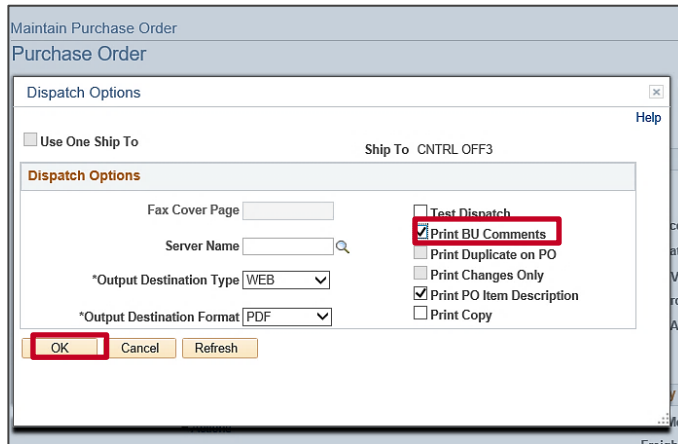
Details Ship To/Due Date Statuses Item Information Attributes BFO Contract Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503532225	STONE NO. 68	55000.0000	LTN	7503532	29.24000	1,608,200.00	Approved

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

Save Return to Search Notify Refresh Add Update/Display

29. The Maintain Purchase Order – Purchase Order page displays the PO Status of Approved.
30. The **Dispatch Method** defaults to **Print**. Click the **Dispatch** button. The **Dispatch Options** pop-up window displays.



Maintain Purchase Order
Purchase Order

Dispatch Options

☐ Use One Ship To Ship To: CNTRL OFF3

Dispatch Options

Fax Cover Page

Server Name

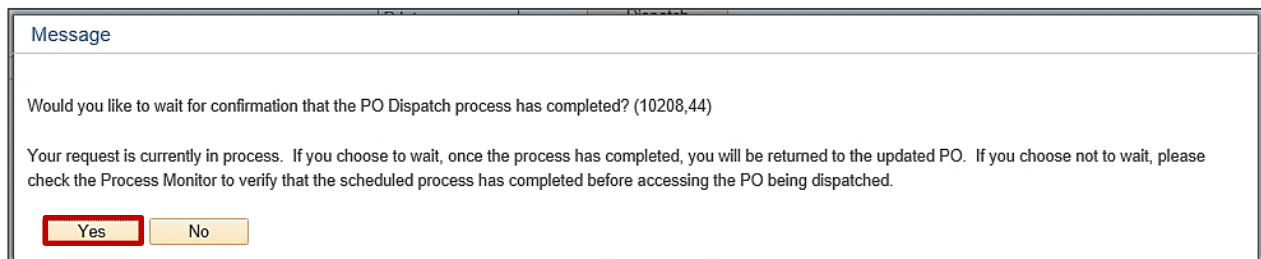
*Output Destination Type: WEB

*Output Destination Format: PDF

☐ Test Dispatch
☒ **Print BU Comments**
☐ Print Duplicate on PO
☐ Print Changes Only
☒ Print PO Item Description
☐ Print Copy

OK Cancel Refresh

31. Check the **Print BU Comments** check-box to display line and header comments, to include eVA terms and conditions.
32. Click the **OK** button.
33. A pop-up message regarding waiting for confirmation displays.



Message

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)

Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.

Yes No

34. Click the **Yes** button.
35. Once the PO Dispatch process has completed, the **Maintain Purchase Order – Purchase Order** page displays.

Favorites ▾ Main Menu ▾ Purchasing ▾ Purchase Orders ▾ Add/Update POs

Maintain Purchase Order
Purchase Order
 Business Unit 50100
 PO ID 0001201106

PO Status Approved ✕

Copy From ▾ ☐ Hold From Further Processing

Header ⓘ
 *PO Date 11/13/2019 ⓘ Supplier Search
 *Supplier LL CARTER -003 ⓘ Supplier Details
 *Supplier ID 0000033093 ⓘ LL Carter & Son Inc
 *Buyer LISAMASON ⓘ Mason, Lisa (VDOT)
 PO Reference Delivered Stone Fredericksburg
 Web IMS? ⓘ
 Header Details
 PO Defaults
 PO Activities
 Requisitions
 Actions

Activity Summary
 Add Comments
 Add ShipTo Comments
 Document Status

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 1,608,200.00
 Freight/Tax/Misc. 0.00
 Total Amount 1,608,200.00 USD
 Calculate

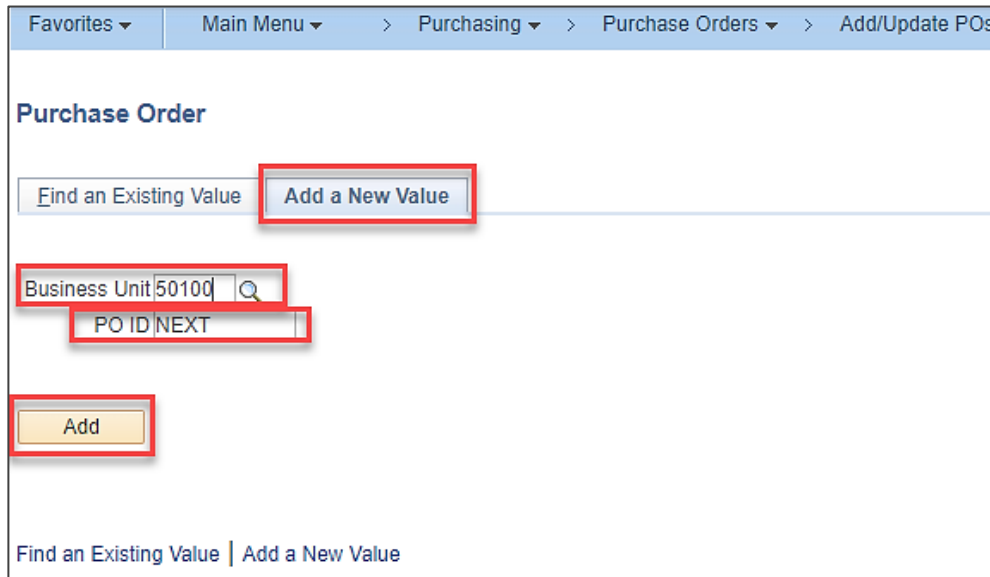
36. The **PO Status** is updated to **Dispatched**.

37. A dispatched PO flows to eVA for reporting purposes. If the supplier is set up in eVA as URL dispatch, the PO is sent electronically to the supplier. If not, the Buyer should print the PO and send it to the supplier.

Purchase Order (Ad-Hoc)

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

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)
3. Cardinal assigns a **PO ID** number when you successfully save the PO.
4. Click **Add** button.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID NEXT PO Status Initial

Copy From ▾ ☐ Hold From Further Processing

▼ Header ?

*PO Date 11/13/2019 Supplier Search

*Supplier Supplier Details

*Supplier ID

*Buyer

PO Reference

Web IMS?: ☐

Header Details
PO Defaults
PO Activities
▼ Actions

Activity Summary
Add Comments
Add ShipTo Comments

Receipt Status Not Recvd

*Dispatch Method Dispatch

eVA PO Type R01 Routine Bill Vendor

*eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dttm

Amount Summary ?

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

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All | 1 of 1 | First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	0.000	Open			

View Approvals

Save Notify Refresh

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

Add Update/Display

5. PO default information is displayed as shown.
6. Enter **Supplier ID**. Use lookup icon if necessary.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID NEXT PO Status Open ☒

Copy From ☐ Hold From Further Processing

▼ Header ?

*PO Date 11/14/2019 Supplier Search
 *Supplier LL CARTER -003 Supplier Details
 *Supplier ID 0000033093 LL Carter & Son Inc
 *Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

PO Reference

Web IMS: ☐

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 ▼ Actions

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	55,000.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	55,000.00	USD

Add Items From ?

Catalog Purchasing Kit

Item Search

Lines ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503551310	STONE RIP RAP	1000.0000	LTN	7503551	35.00000	35,000.00	Open
2	7503532225	STONE NO. 68,	500.0000	LTN	7503532	40.00000	20,000.00	Open

View Approvals

Save Notify Refresh Add Update/Display

- Enter **Item ID**.
- Enter **PO QTY** and **Price**. Cardinal calculates and displays the total **Merchandise Amount**.
- Click on **Schedule** icon.

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

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Open
PO ID NEXT PO Date 11/14/2019

Return to Main Page

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503551310	STONE RIP RAP CLASS AI	1000.0000	LTN		35.00000	35,000.00	Active

Schedules

Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Use Tax	Distributions/ChartFields
1		11/14/2019	CULPPR DIS		1000.0000	35.00000	35,000.00	Active				

Add ShipTo Comments

Save Notify Refresh Add Update/Display

- Enter/Update **Ship To** location as necessary.
- Click on **Distribution/ChartFields** icon.

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003
 PO ID NEXT Item 7503551310 STONE RIP RAP CLASS AI
 Line 1
 Schedule 1 Status Active

*Distribute By

SpeedChart Multi-SpeedCharts

Schedule Qty 1000.0000
 Merchandise Amount 35,000.00 USD
 Doc. Base Amount 35,000.00 USD

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

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	1000.000	35,000.00	USD	50100		5012550	01000		10141

OK Cancel Refresh

12. Enter your accounting distribution.

13. Click **OK**.

Favorites ▾ Main Menu ▾ Purchasing ▾ Purchase Orders ▾ Add/Update POs

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Open
 PO ID NEXT PO Date 11/14/2019

[Return to Main Page](#)

Lines Find | View All | First 1 of 2 Last

Line	Item	Description	PO Qty	LTN Merchandise Amt	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Use Tax	Distributions/ChartFields
1	7503551310	STONE RIP RAP CLASS AI	1000.0000	35,000.00	35,000.00	35,000.00	Active				

Add Ship To Comments

Save Notify Refresh Add Update/Display

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

Lines ? Personalize | Find | View All | First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503551310	STONE RIP RAP	1000.0000	LTN	7503551	35,000.00	35,000.00	Open
2	7503532225	STONE NO. 68	500.0000	LTN	7503532	40,000.00	20,000.00	Open

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

Save Notify Refresh Add Update/Display

15. Click **Save**.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100
PO ID 0001201107
Copy From

PO Status Open ☒ ☐ ☐

☐ Hold From Further Processing

▼ Header ?

*PO Date 11/14/2019 Supplier Search
*Supplier LL CARTER -003 Supplier Details
*Supplier ID 0000033093 LL Carter & Son Inc
*Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

PO Reference

Web IMS?: ☐

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
▼ Actions

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	1,594,000.00
Freight/Tax/Misc.	0.00
Total Amount	1,594,000.00 USD

Calculate

16. Click on **PO Status** checkbox.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100
PO ID 0001201107
Copy From

PO Status Pend Appr ☒ ☐ ☐

☐ Hold From Further Processing

▼ Header ?

*PO Date 11/14/2019 Supplier Search
*Supplier LL CARTER -003 Supplier Details
*Supplier ID 0000033093 LL Carter & Son Inc
*Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

PO Reference

Web IMS?: ☐

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
▼ Actions

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	1,594,000.00
Freight/Tax/Misc.	0.00
Total Amount	1,594,000.00 USD

Calculate

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

Personalize | Find | View All | First 1-2 of 2 Last

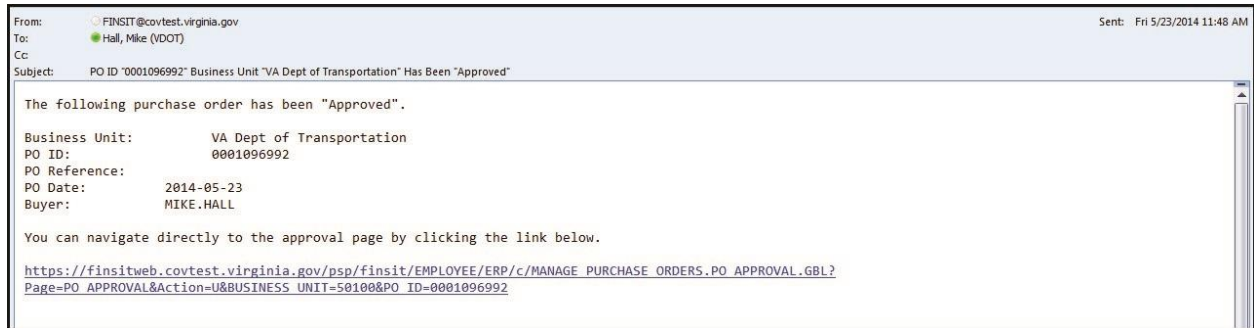
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503551310	STONE RIP RAP	50000.0000	LTN	7503551	31.48000	1,574,000.00	Pending
2	7503532225	STONE NO. 68	500.0000	LTN	7503532	40.00000	20,000.00	Pending

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

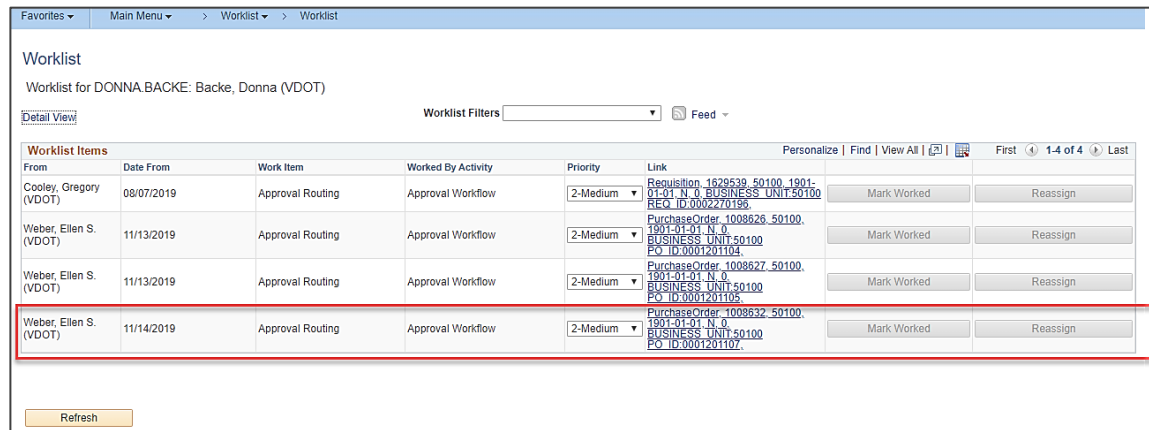
Save Notify Refresh Add Update/Display

17. The PO is in a Pending Approval status and routes to the Approver's Worklist for approval.

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

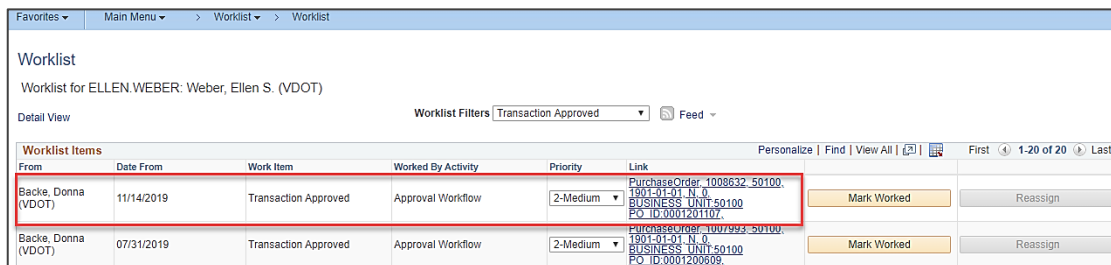


Example of Email



Example of Worklist

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



20. Or, from the Worklist, click on **Purchase Order** hyperlink.

Favorites ▾ Main Menu ▾ ▸ Purchasing ▾ ▸ Purchase Orders ▾ ▸ Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100
PO ID 0001201107

Copy From ▾

PO Status Approved ✗

☐ Hold From Further Processing

▼ Header ?

*PO Date 11/14/2019 Supplier Search
*Supplier LL CARTER -003 Supplier Details
*Supplier ID 0000033093 LL Carter & Son Inc
*Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

PO Reference

Web IMS?: ☐

Header Details
PO Defaults
PO Activities
Requisitions
▼ Actions

Activity Summary
Add Comments
Add ShipTo Comments
Document Status

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

Dispatch

Amount Summary ?

Merchandise 1,594,000.00
Freight/Tax/Misc. 0.00
Total Amount 1,594,000.00 USD

Calculate

Add Items From ?

Catalog
Purchasing Kit

Select Lines To Display ?

Search for Lines Line To Retrieve

Lines ?

Personalize | Find | View All | First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	7503551310	STONE RIP RAP	50000.0000	LTN	7503551	31.48000	1,574,000.00	Approved			
2	7503532225	STONE NO. 68,	500.0000	LTN	7503532	40.00000	20,000.00	Approved			

View Approvals

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

Save Return to Search Notify Refresh Add Update/Display

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

22. Click on **Dispatch** button.

Dispatch Options

☐ Use One Ship To Ship To CULPPR DIS

Dispatch Options

Fax Cover Page

Server Name

*Output Destination Type WEB

*Output Destination Format PDF

☐ Test Dispatch
☒ **Print BU Comments**
☐ Print Duplicate on PO
☐ Print Changes Only
☐ Print PO Item Description
☐ Print Copy

OK Cancel Refresh

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

24. Click **OK**.

Message

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)

Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.

Yes

No

25. Click **Yes**

Purchase Order

Business Unit 50100
PO ID 0001201107

Copy From [v] ☐ Hold From Further Processing

Header

*PO Date 11/14/2019 Supplier Search
*Supplier LL CARTER -003 Supplier Details
*Supplier ID 0000033093 LL Carter & Son Inc
*Buyer ELLEN.WEBER Weber, Ellen S. (VDOT)

PO Reference [v]

Web IMS?: ☐

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Requisitions Document Status
▼ Actions

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	1,594,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	1,594,000.00	USD

Calculate

Add Items From Catalog Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line [v] To [v] Retrieve

Lines

Personalize | Find | View All | First 1-2 of 2 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	7503551310	STONE RIP RAP CLASS AI	50000.0000	LTN	7503551	31.48000	1,574,000.00	Approved					
2	7503532225	STONE NO. 68, STONE	500.0000	LTN	7503532	40.00000	20,000.00	Approved					

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

Save Return to Search Notify Refresh Add Update/Display

26. Purchase Order is **Dispatched**.

27. Electronic file copy will be sent to **eVA**.

PO Helpful Hints

For more detailed information on how to create, maintain, modify (change orders), reconcile/close, and review POs please refer to the course entitled **PR344: Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Training**.

PO Defaults

eVA Order Method: The PO is delivered to the supplier based on preferences set up in eVA. You will not have access to make any changes. Field values include:

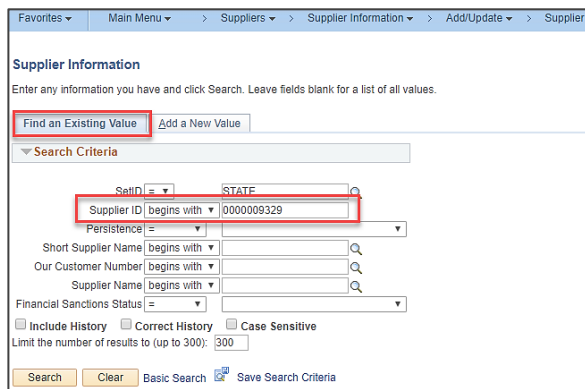
- **Supplier is Exception:** Most government type suppliers are set up with an eVA preferred order method of exception, which keeps the Cardinal PO from being interfaced to eVA.
- **Supplier is URL:** Suppliers register in eVA to receive electronic POs. URL is a Uniform Resource Locator, used as an address on the World Wide Web.
- **Supplier is Print:** The buyer needs to send the PO to the supplier manually (fax, email, etc.).

Look Up eVA PO Type	
Select one of the following values:	
E01	Emrgcy Bill Vendor
EPO	Existing PO
EVP	eVA Purchase Order
GOP	Grant Opportunity
INV	PCard Payment of Invoice
ISP	Integrated Supply Serv Prog
OTC	Over The Counter eVA Exempt
P01	Proprietary Bill Vendor
R01	Routine Bill Vendor
S01	Sole Src Bill Vendor
VE1	Emrgcy VITA Bill Vendor
VP1	Proprietary VITA Bill Vendor
VR1	Routine VITA Bill Vendor
VS1	Sole Src VITA Bill Vendor
X02	Excluded Per APSPM
<input type="button" value="Cancel"/>	

Suppliers



1. If this message displays, the selected supplier must be changed.
2. Supplier information is electronically transmitted from eVA into Cardinal. It is important to ensure that the eVA supplier and ordering address are correct on the PO.
3. Before creating a PO you may wish to verify a supplier, address or other information for your new PO. To review, navigate to the Supplier Information page using the following path:
4. Main Menu > Supplier > Supplier Information > Add/Update > Supplier



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

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

Search Criteria

SetID: STATE

Supplier ID begins with: 0000009329

Persistence: =

Short Supplier Name begins with:

Our Customer Number begins with:

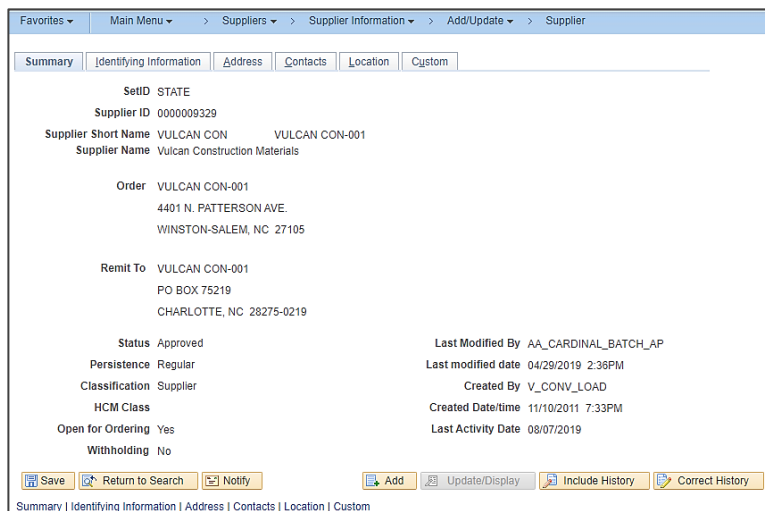
Supplier Name begins with:

Financial Sanctions Status: =

☐ Include History ☐ Correct History ☐ Case Sensitive

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

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



Summary | Identifying Information | Address | Contacts | Location | Custom

SetID: STATE

Supplier ID: 0000009329

Supplier Short Name: VULCAN CON

Supplier Name: Vulcan Construction Materials

Order: VULCAN CON-001

4401 N. PATTERSON AVE.

WINSTON-SALEM, NC 27105

Remit To: VULCAN CON-001

PO BOX 75219

CHARLOTTE, NC 28275-0219

Status: Approved

Persistence: Regular

Classification: Supplier

HCM Class:

Open for Ordering: Yes

Withholding: No

Last Modified By: AA_CARDINAL_BATCH_AP

Last modified date: 04/29/2019 2:36PM

Created By: V_CONV_LOAD

Created Date/Time: 11/10/2011 7:33PM

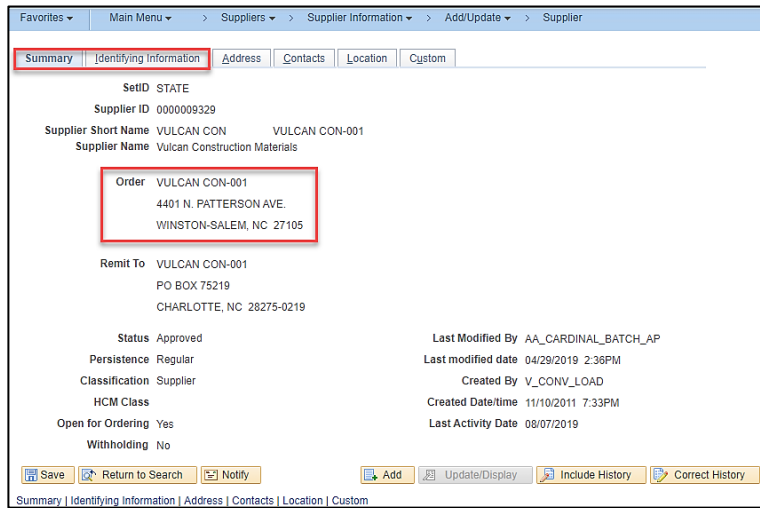
Last Activity Date: 08/07/2019

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

Summary | Identifying Information | Address | Contacts | Location | Custom

4. Search for the supplier you wish to review.
5. Click the **Supplier ID** hyperlink.

6. The default ordering address displays on the **Summary** tab.



The screenshot shows the 'Supplier Information' page for 'VULCAN CON-001'. The 'Summary' tab is selected, and the 'Order' address is highlighted with a red box. The address is: 4401 N. PATTERSON AVE, WINSTON-SALEM, NC 27105.

Field	Value
SetID	STATE
Supplier ID	0000009329
Supplier Short Name	VULCAN CON
Supplier Name	Vulcan Construction Materials
Order	VULCAN CON-001 4401 N. PATTERSON AVE. WINSTON-SALEM, NC 27105
Remit To	VULCAN CON-001 PO BOX 75219 CHARLOTTE, NC 28275-0219
Status	Approved
Persistence	Regular
Classification	Supplier
HCM Class	
Open for Ordering	Yes
Withholding	No
Last Modified By	AA_CARDINAL_BATCH_AP
Last modified date	04/29/2019 2:36PM
Created By	V_CONV_LOAD
Created Date/time	11/10/2011 7:33PM
Last Activity Date	08/07/2019

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

7. Select the **Identifying Information** tab.

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ > Supplier

Summary Identifying Information Address Contacts Location Custom

SetID STATE *Supplier Name Vulcan Construction Materials
 Supplier ID 0000009329 Additional Name
 *Supplier Short Name VULCAN CON VULCAN CON-001
 *Classification Supplier Check for Duplicate
 HCM Class
 *Persistence Regular *Supplier Audit Default
 *Supplier Status Approved
 Expand All Collapse All Attachments (0)

Supplier Relationships

☐ Corporate Supplier InterUnit Supplier
 Corporate SetID STATE InterUnit Supplier ID
 Corporate Supplier ID 0000009329 Supplier Hierarchy Supplier 360
 Vulcan Construction Materials

Create Bill-To Customer
☐ Create Bill To Customer

Supplier Rating
 Supplier Logo
 Additional ID Numbers
 Duplicate Invoice Settings
Government Classifications
 Standard Industry Codes
 Additional Reporting Elements
 Financial Sanctions Status
 Comments
 Expand All Collapse All

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

- To view the supplier's Virginia Department of Small Business and Supplier Diversity (SBSD) classification, click the arrow next to the **Government Classifications** section to expand the section.

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ > Supplier

Summary Identifying Information **Address** Contacts Location Custom

SetID STATE
 Supplier ID 0000009329
 *Supplier Short Name VULCAN CON VULCAN CON-001
 *Classification Supplier
 HCM Class
 *Persistence Regular
 *Supplier Status Approved

*Supplier Name Vulcan Construction Materials
 Additional Name
☐ Withholding
☒ Open For Ordering
 *Supplier Audit Default
☐ Supplier Audit

Check for Duplicate

Expand All Collapse All Attachments (0)

Supplier Relationships

☐ Corporate Supplier
 Corporate SetID STATE
 Corporate Supplier ID 0000009329
 Vulcan Construction Materials

☐ InterUnit Supplier
 InterUnit Supplier ID
 Supplier Hierarchy Supplier 360

Create Bill-To Customer

☐ Create Bill To Customer

Supplier Rating
 Supplier Logo
 Additional ID Numbers
 Duplicate Invoice Settings
 Government Classifications

EEO Certification Date HUB Zone

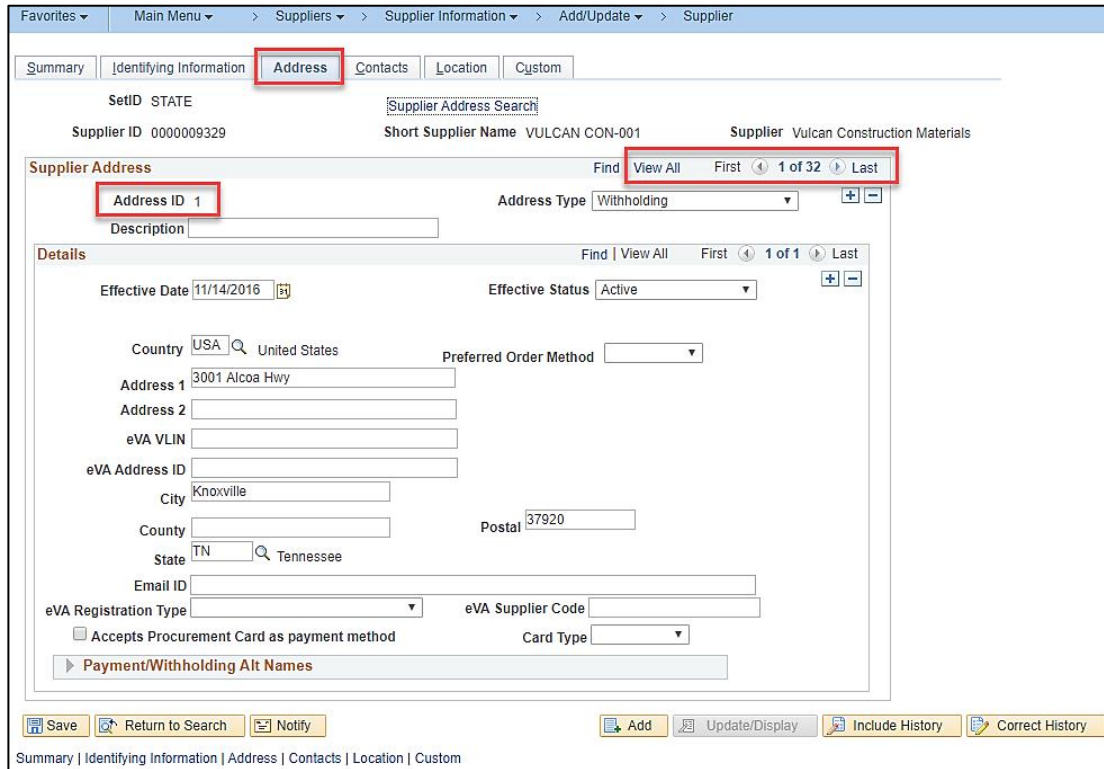
Government Sources Find | View All First 1 of 1 Last

*Certification Source SBSD Small Business and Supplier Diversity

Government Classifications Find | View All First 1 of 1 Last

Effective Date 11/14/2019 Certification Number
 Govt. Class Small
 *Class Status
 Class Start Date Class Expiration Date Class Termination Date Last Upd Dttm

9. In this example, the Certification Source of SBSD with the Government Classification of Small Business (S) is noted.
10. Select the **Address** tab.



Supplier ID 000009329 Short Supplier Name VULCAN CON-001 Supplier Vulcan Construction Materials

Supplier Address Find View All First 1 of 32 Last

Address ID 1 Address Type Withholding

Description

Details Find View All First 1 of 1 Last

Effective Date 11/14/2016 Effective Status Active

Country USA United States Preferred Order Method

Address 1 3001 Alcoa Hwy

Address 2

eVA VLIN

eVA Address ID

City Knoxville

County Postal 37920

State TN Tennessee

Email ID

eVA Registration Type eVA Supplier Code

☐ Accepts Procurement Card as payment method Card Type

Payment/Withholding Alt Names

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

Summary | Identifying Information | Address | Contacts | Location | Custom

11. There are 4 available addresses. Using the left and right arrows you can scroll through the addresses to find the proper ordering address for your PO or, by selecting **View All**, you can see all the addresses stacked on the page and use the page scroll bar to view them.

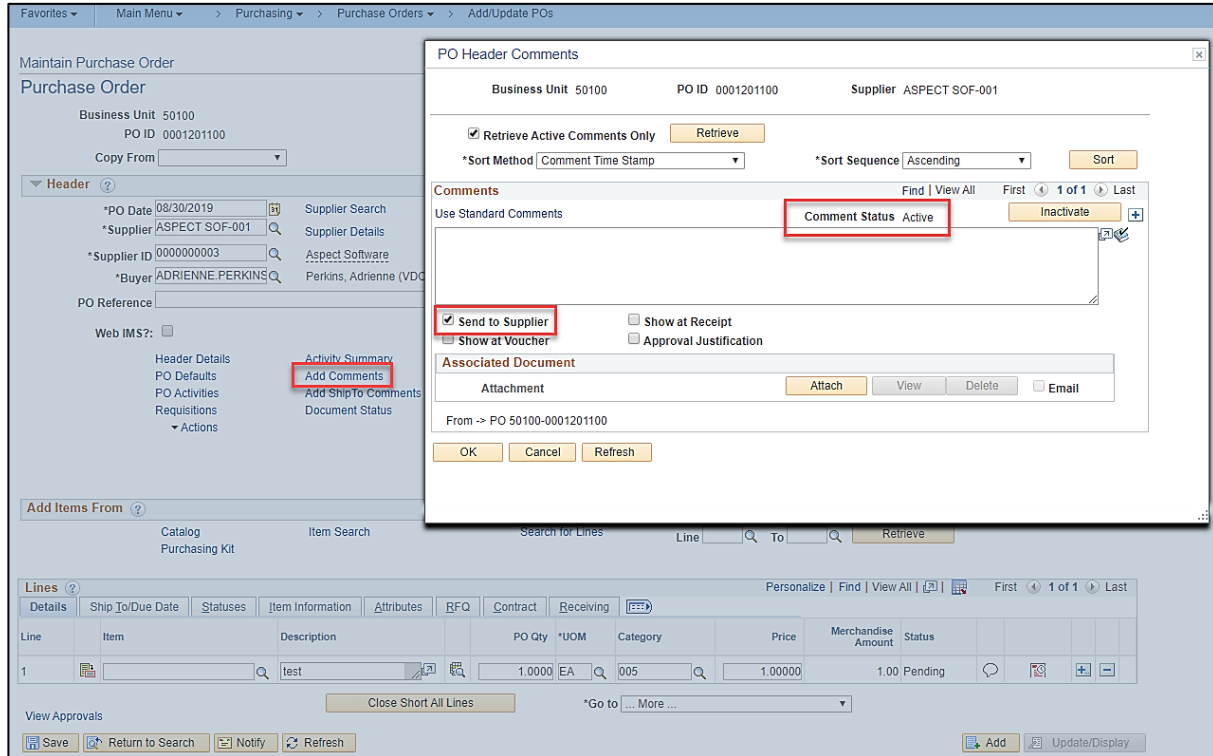
12. Take note of the **Address ID** number for the address you wish to use on your PO.

Virginia Distribution Center (VDC) Purchase Orders

- **Supplier ID** #0000031103 Department of General Services – Surplus
- Select address # 9 from the **Supplier 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.

PO Comments

- From the **Maintain Purchase Order** screen, click the **Add Comments** hyperlink. The **PO Header Comments** pop-up window displays.
- Check the **Send to Supplier** check-box for comments to print on the PO.

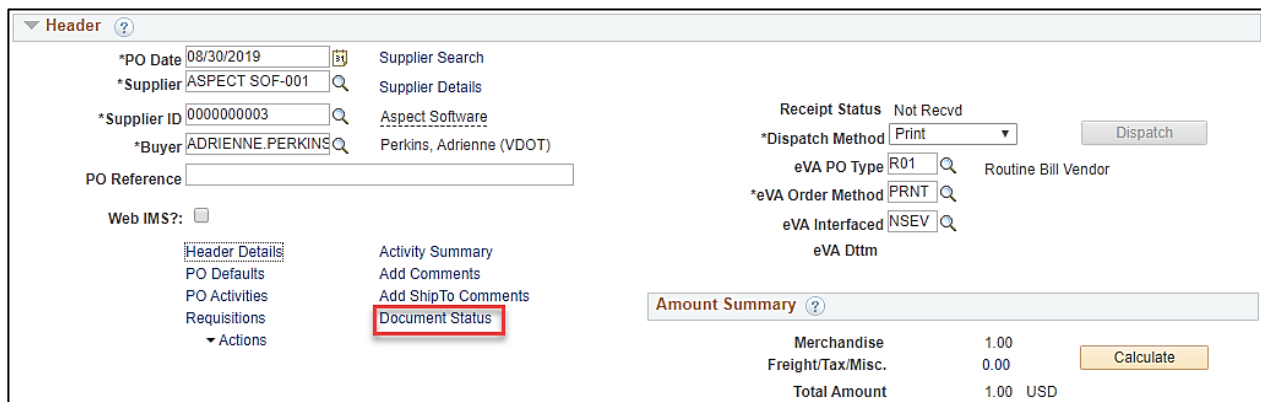


The screenshot shows the 'Maintain Purchase Order' interface. The 'PO Header Comments' pop-up window is open, displaying fields for Business Unit (50100), PO ID (0001201100), and Supplier (ASPECT SOF-001). The 'Retrieve Active Comments Only' checkbox is checked. The 'Comments' section shows a list of comments with a 'Comment Status' of 'Active'. The 'Send to Supplier' checkbox is checked and highlighted with a red box. Other options like 'Show at Receipt', 'Show at Voucher', and 'Approval Justification' are also visible. The 'Associated Document' section includes an 'Attachment' field and buttons for 'Attach', 'View', 'Delete', and 'Email'. The 'From' field is set to 'PO 50100-0001201100'. The 'OK', 'Cancel', and 'Refresh' buttons are at the bottom of the pop-up.

5.

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

Related Documents



The screenshot shows the 'Maintain Purchase Order' interface. The 'Document Status' hyperlink is highlighted with a red box. The 'Amount Summary' section at the bottom shows the following values:

Amount Summary	Value	Unit
Merchandise	1.00	
Freight/Tax/Misc.	0.00	
Total Amount	1.00	USD

6.

- Click the **Document Status** hyperlink to view all related documents (i.e., requisitions, strategic sourcing events, contracts, receipts, vouchers, and payments).