



501 PR344: Processing Purchase Orders

Instructor Led Training



Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course we will show you the Purchase Order process.

These training materials include diagrams, charts, screenshots, etc., that clarify various tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your agency's Security Handbook, located on the Cardinal website, for a list of available roles and descriptions.





Course Objectives

After completing this course, you will be able to:

- Describe Purchase Order Concepts, Processes, Integration, and Interfaces
- Create Purchase Orders
- Review and Manage Purchase Orders
- Cancel Purchase Orders
- Create a Purchase Order Change Order
- Reconcile / Close a PO
- Explain and Describe Key Reports and Online Inquires Related to Purchase Orders





Course Topics

Today, we will cover the following topics:

- Lesson 1: Understand Purchase Orders
- Lesson 2: Process Purchase Orders
- Lesson 3: Maintain and Modify (Change Orders) Purchase Orders
- Lesson 4: Reconcile / Close a PO – 3 Way Match
- Lesson 5: Review Purchase Order Information, History, and Activities
- Lesson 6: Purchase Order Reports



Lesson 1: Understanding Purchase Orders

This lesson covers the following topics:

- Procurement Overview
- Key Concepts
- Procurement Process Overview
- Purchase Order Process
- Integration with Accounts Payable
- Interfaces with eVA and SiteManager



Procurement Overview

The Procurement functional area of Cardinal includes four modules.

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, procurement card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

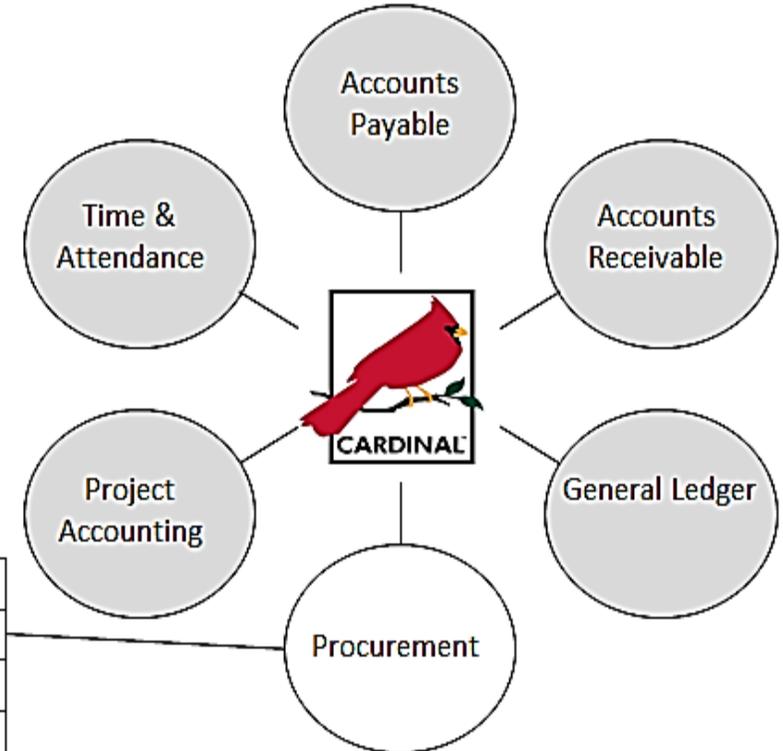
Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids / proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.

Cardinal Functional Areas



Modules

	Purchasing	
	eProcurement	
	Strategic Sourcing	
	Procurement Contracts	



Key Concepts

- Cardinal interfaces with external systems (eVA, SiteManager, etc.) daily, which eliminates duplicate entries in multiple systems.
- There is a Statewide procurement supplier database that is updated by eVA daily and maintained by the Commonwealth Supplier Group (CVG) and is shared with all agencies. Fiscal suppliers (non-procurement suppliers) are created directly in Cardinal by the Commonwealth Supplier Group (CVG). The suppliers are shared between the Accounts Payable and the Procurement functional areas.



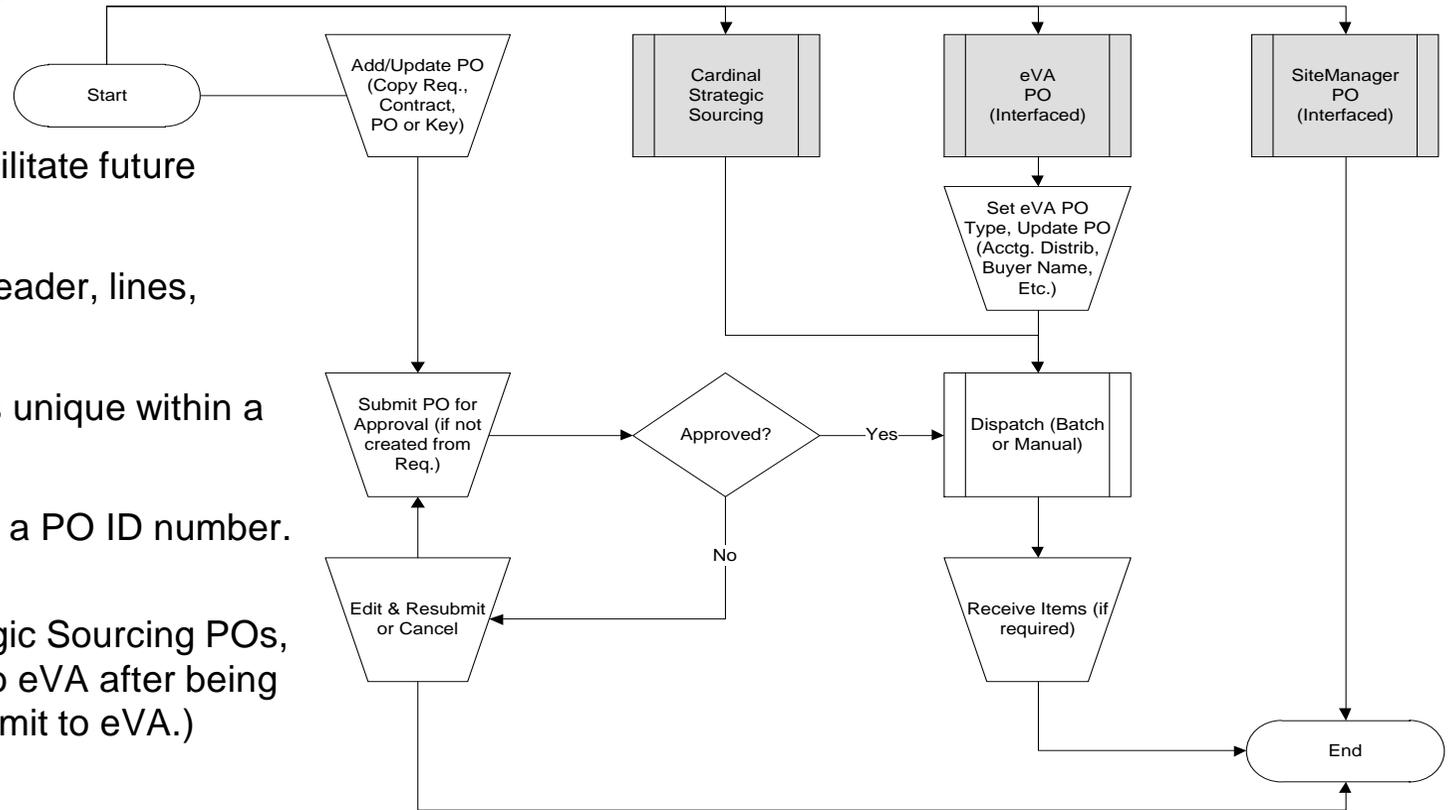
Purchase Order Process

Using the Purchasing module, you can create a PO online that converts purchase requests into POs. Line information is provided to Accounts Payables for invoice payment.

As POs proceed from entry to dispatch, Cardinal tracks details and collects analysis information to facilitate future purchases.

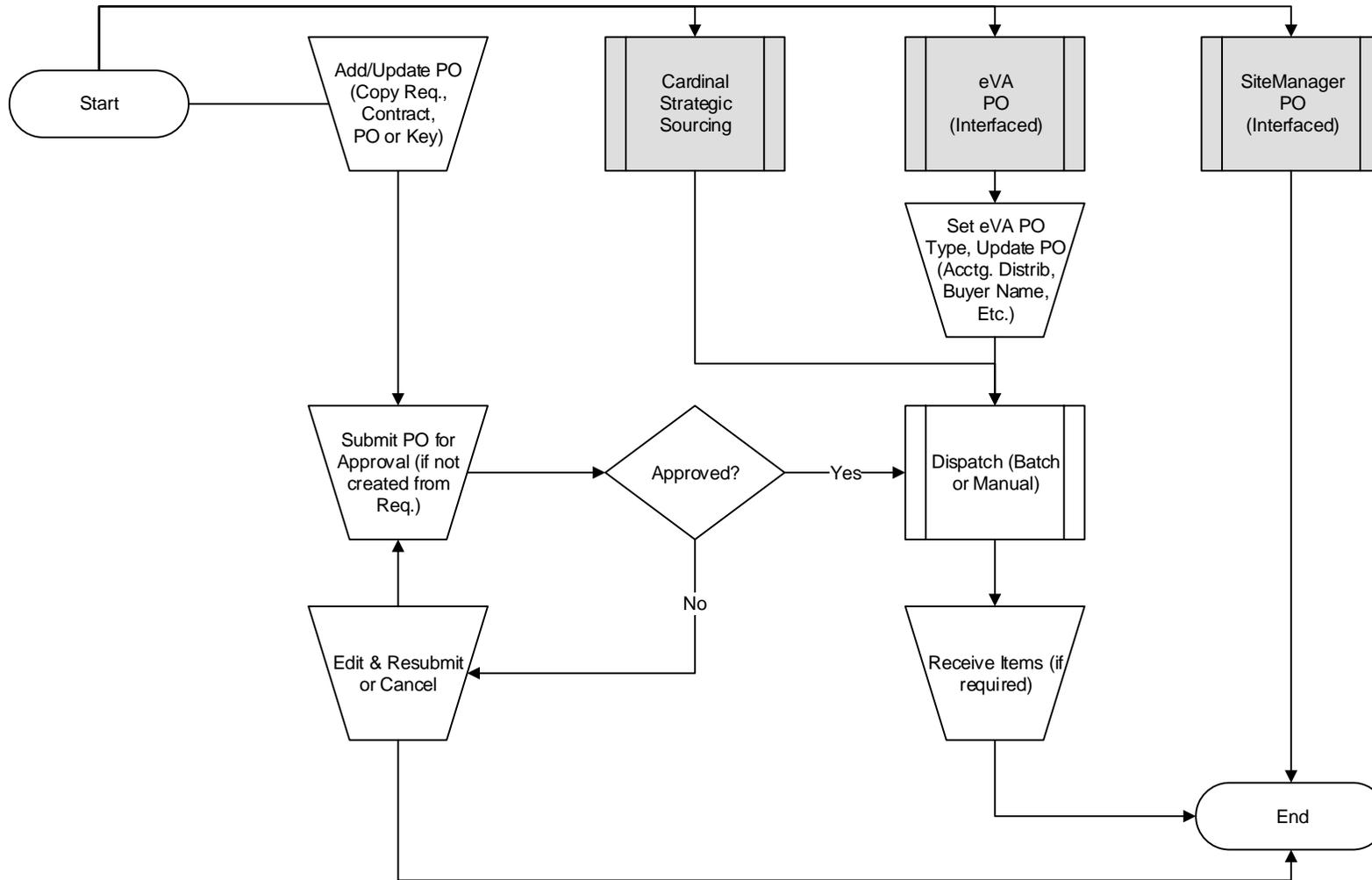
- PO key components include: a header, lines, schedules, and distributions.
- A PO is identified by an ID that is unique within a purchasing business unit.
- Cardinal automatically generates a PO ID number.

Note: POs keyed into Cardinal, Strategic Sourcing POs, and SiteManager POs are interfaced to eVA after being dispatched. (Only R01 type POs transmit to eVA.)





Purchase Order Process (continued)



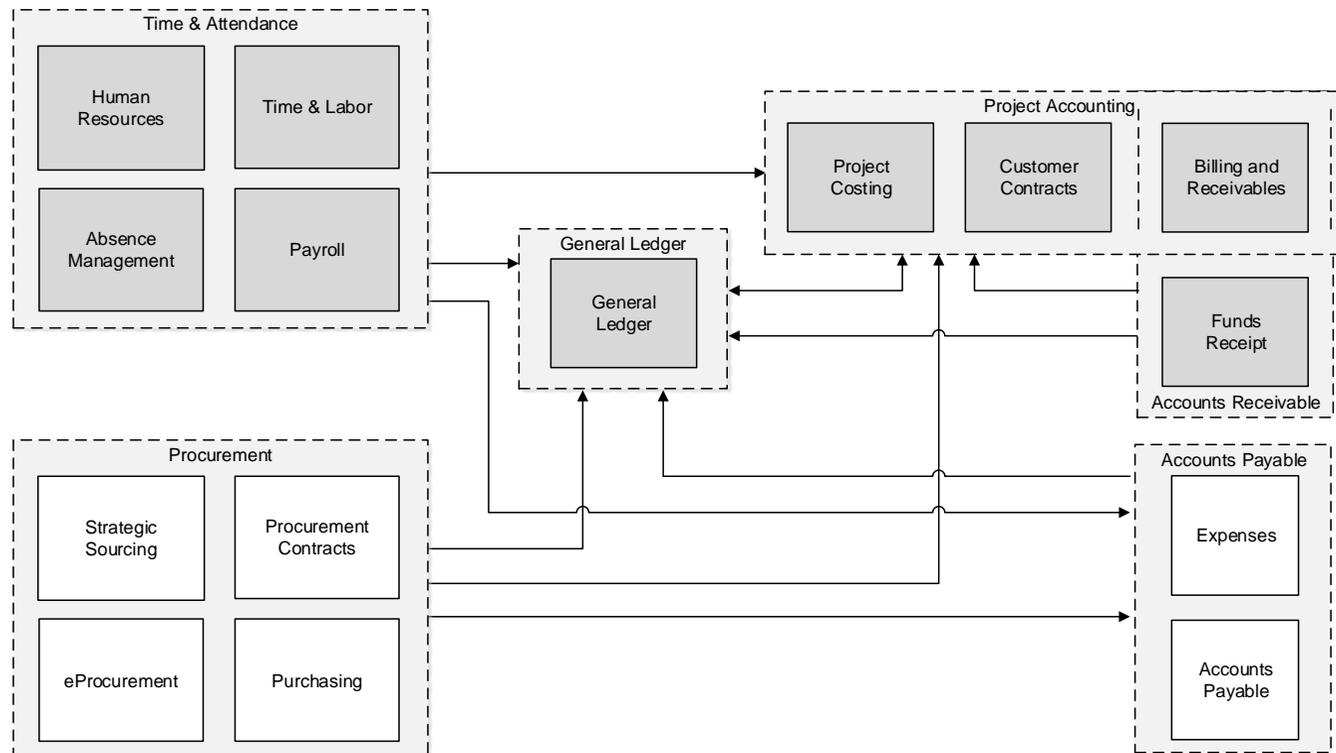
Note: POs keyed into Cardinal, Strategic Sourcing POs, and SiteManager POs are interfaced to eVA after being dispatched. (Only R01 type POs transmit to eVA.)



Integration with Accounts Payable

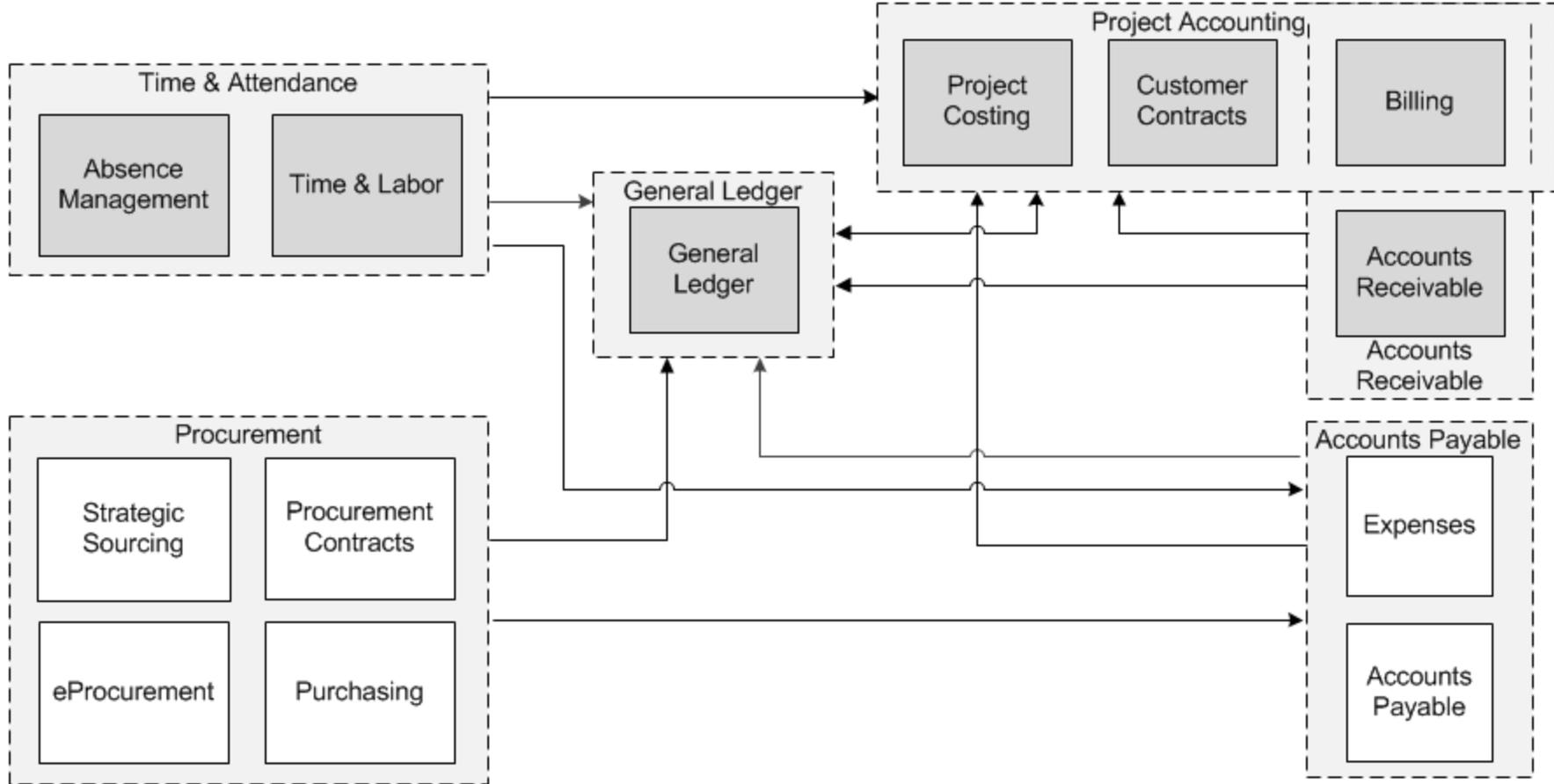
Processing a PO involves the Accounts Payable module in the matching process. Matching ensures that you are paying for what you ordered and received by comparing vouchers with POs and receiving documents.

- **Two-way matching:** For POs that do not require receiving, the PO and voucher are compared. (i.e. professional services and SiteManager).
- **Three-way matching:** For POs that have receiving, the PO, receipt, and voucher are compared.





Integration with Accounts Payable (continued)





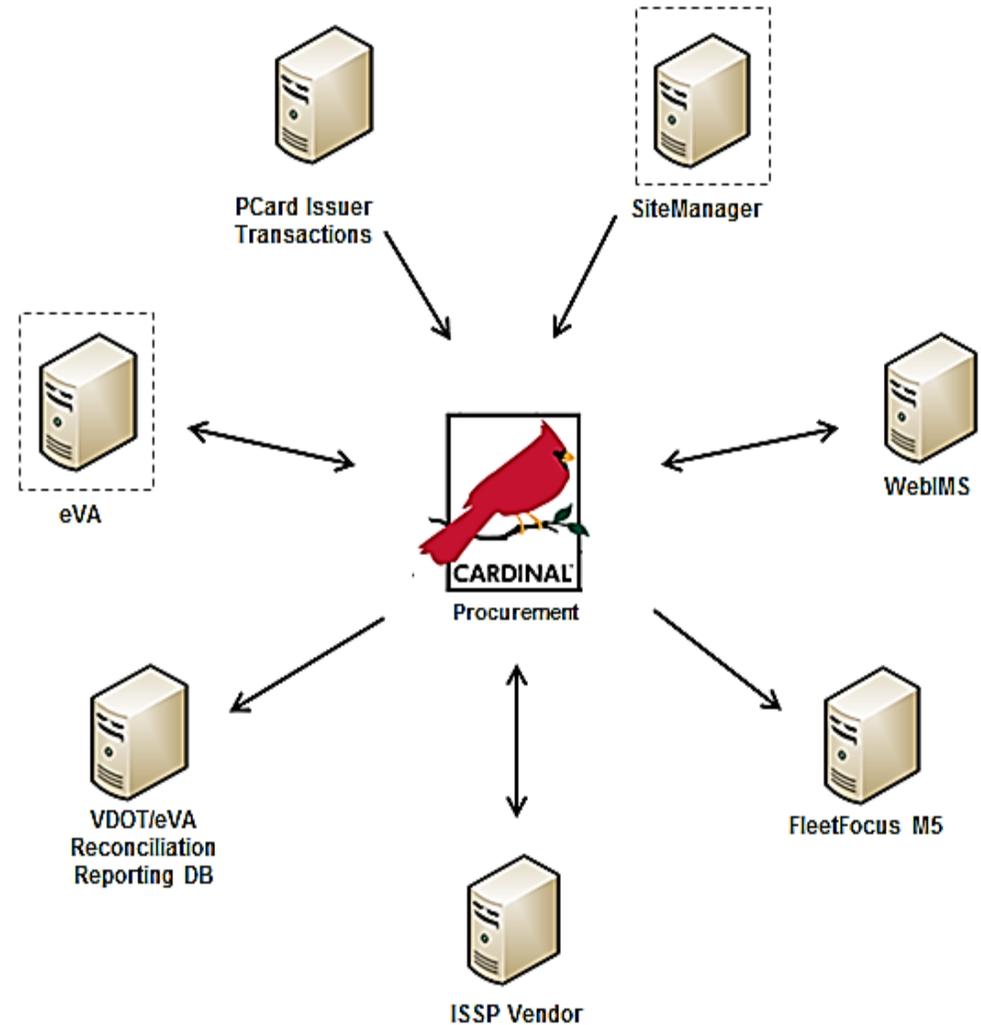
Interfaces with eVA and SiteManager

The PO process interfaces with eVA:

- POs and change orders that are created in eVA are imported daily from eVA.
- POs and change orders created are exported to eVA. This interface does not send attachments.
- When required, a designated Administrative Services Division (ASD) staff member needs to upload attachments into eVA.
- In Cardinal only accounting distribution changes can be made to POs that originated in eVA. All other changes to an eVA PO are made in the eVA system and interfaced back into Cardinal.

The PO process interfaces with SiteManager:

- SiteManager sends construction and maintenance contract records to Cardinal, where it is used to create contracts and POs.





Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material.

Answer the review questions below:

Questions:

1. I am a commitment from an agency to suppliers to purchase goods or services from that supplier. _____
2. I am the four components of a purchase order. _____
3. I can create a PO. Who am I? _____
4. I can create a requisition. Who am I? _____

Answer Choices:

- a) Header, lines, schedules, and distributions
- b) A PO
- c) user
- d) Buyer





Lesson 1: Summary

In this lesson, you learned about:

- Processing Purchase Orders
- Purchasing Key Concepts
- Procurement functional areas modules: Purchasing, eProcurement, Strategic Sourcing, and Procurement Contracts
- Change orders are used to add items, increase / decrease quantities, and change prices or ship to values
- How Purchasing integrates with Accounts Payable
- How Purchasing interfaces with eVA and SiteManager



Lesson 2: Processing Purchase Orders

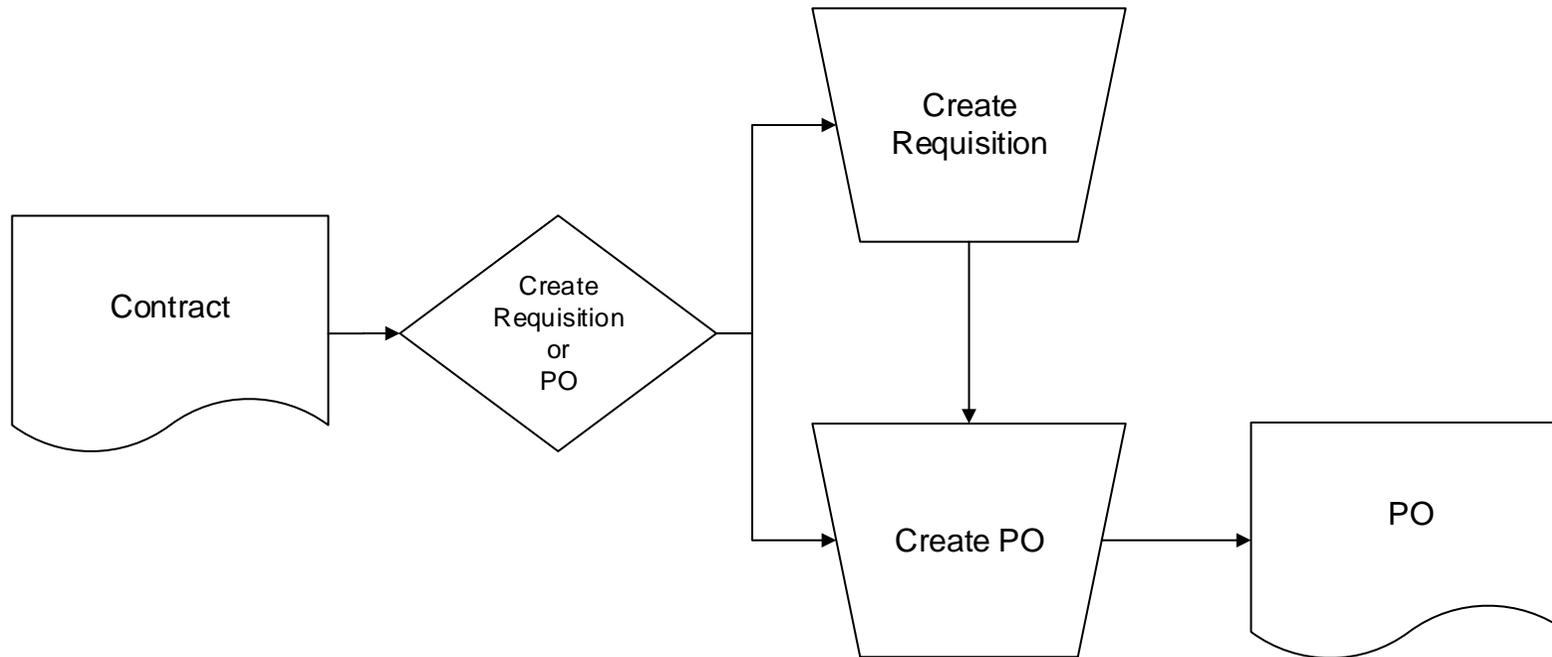
This lesson covers the following topics:

- Purchase Order Basics
- Creating Purchase Orders
- Managing eVA Purchase Orders
- Submitting Purchase Orders for Approval
- Dispatching and Printing Purchase Orders



Purchase Order Basics

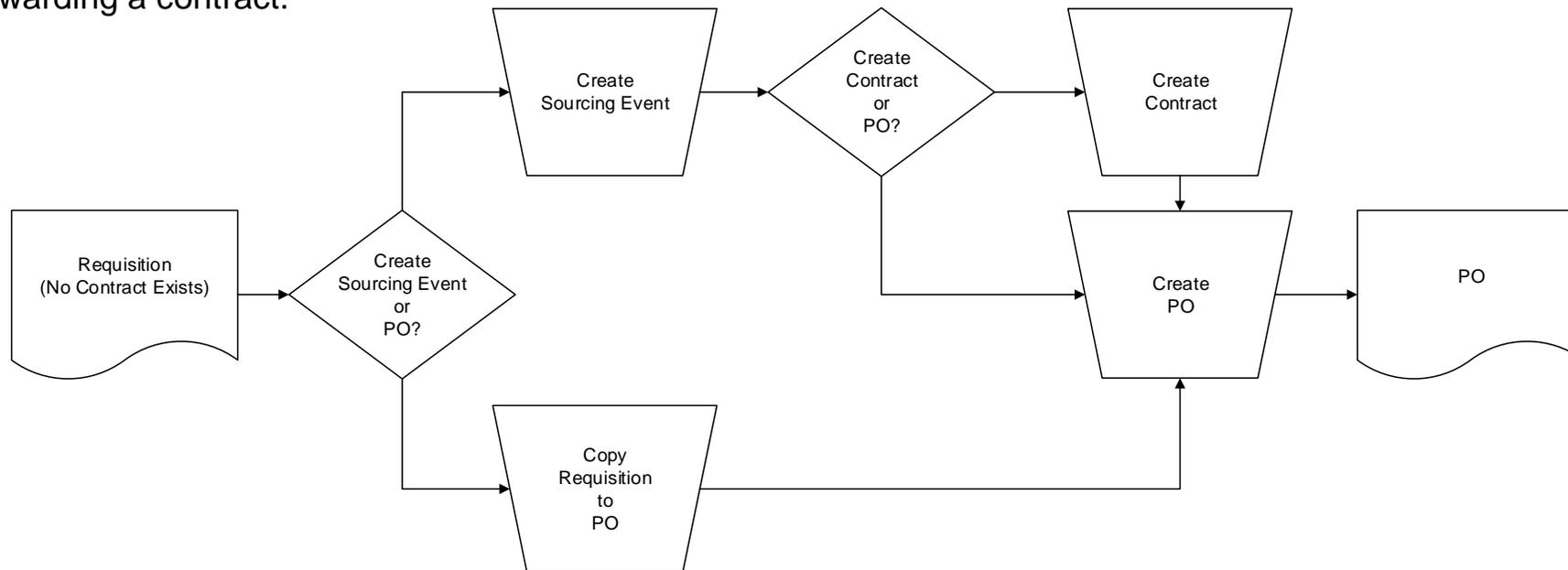
- Purchase Orders (POs) are commitments from an organization to suppliers to purchase goods or services from that supplier. The purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, is listed on the document and is part of the contractual nature of the PO.
- All purchases must have a purchase order, but not all purchase orders need a requisition. If a good or a service is already on contract, a requisition is not generally required. **Exception:** All inventory issue and restock transactions must be done using a requisition.





Purchase Order Basics (continued)

- When a contract already exists, a requisition is not always necessary. You can create a purchase order against the contract and avoid additional steps.
- When a contract does not exist, the end user has two options after the requisition is created:
 - **Create a Sourcing Event:** Once approved, the requisition goes through a solicitation process, which involves creating a sourcing event. This process allows suppliers to bid against the event. Winning bidders are awarded a contract or purchase order.
 - **Copy the Requisition to Purchase Order:** When the value of goods or services falls within the range of a small purchase, or is otherwise permitted in accordance with the **Agency Procurement and Surplus Property Manual (APSPM)**, the Buyer can copy the requisition directly into the PO, rather than creating a sourcing event and awarding a contract.





Creating Purchase Orders

There are three ways to create a PO:

- Key directly into Cardinal
- Copy
 - Copy a requisition: Use an existing requisition as a template to create a new PO. This creates an electronic link from the PO to the requisition.
 - Copy a purchase order: Copy an existing PO if you want to order the same items.
 - Copy a contract: Copy from an existing contract to save time on data entry. You can copy multiple contracts into an existing PO.
- Award a Strategic Sourcing event to a PO (i.e. Invitation For Bid).

The screenshot shows the 'Purchase Order' creation page in the Cardinal system. The breadcrumb navigation at the top reads: Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs. The page title is 'Purchase Order'. Below the title are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The 'Business Unit' field contains '50100' with a search icon. The 'PO ID' field contains 'NEXT'. There is an 'Add' button below the PO ID field. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

You can navigate to create a PO using the following path:

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



Creating Purchase Orders (continued)

Purchase Orders can be set to quantity or to amount only. Using amount only allows for the receipt by invoice amount.

Receive by Quantity

If you are ordering inventory or items that are specific by count, you would establish a PO with a predetermined quantity of items at a fixed rate / price per item. Therefore, you would set your PO to receive based on the quantities delivered or completed.

Receive by Amount

If you are ordering a service or project that is based on a lump sum, you would establish a PO that allows you to receive the invoice amounts (dollar), not the quantity. Therefore, you would set your PO to **Amount Only** and receive the invoice amount based on the dollars only.

For additional information, refer to the job aid titled **501 PR344: Purchase Orders**.



Creating Purchase Orders (continued)

The first page of the **Purchase Order** opens to the **Add a New Value** tab. The **Business Unit** field defaults to your agency (i.e., **50100** for VDOT) and **PO ID** defaults to **NEXT**. Cardinal will create the **PO ID** number automatically. Do not change the PO ID.

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

Purchase Order

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

Business Unit: 

PO ID:

[Add](#)

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



Creating Purchase Orders (continued)

Purchase Order:

A PO is composed of several sections, including the **Header**, **Lines**, **Schedule**, and **Distribution** information.

We will also discuss **Supplier Details**, **Header Details**, **PO Defaults**, and **Line Details**.

You can add, update, and cancel PO lines, as well as correct PO data such as PO lines, quantities, price, distributions, ship to locations, eVA purchase order type, and comments, as needed.

Maintain Purchase Order
Purchase Order

Business Unit: 50100
PO ID: 0001048123
PO Status: Dispatched
Copy From: [Dropdown]
 Hold From Further Processing
Current Change Reason

Header

*PO Date: 10/31/2012 by Vendor Search
Vendor: S B COX IN-001 [Vendor Details](#)
*Vendor ID: 0000032186
*Buyer: MIKE HALL Hall, Mike (VDOT)
PO Reference: REGIONAL BUILDING DEMOLITION A
Web IMS?:

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

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

Amount Summary

Merchandise: 1,325,415.60
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 1,325,415.60 USD

Add Items From [Purchasing Kit](#) [Catalog](#) [Item Search](#)

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

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status			
1	9132701000	REGIONAL BUILDING DEMOLITION A	1.0000	EA	9132701	1,325,415.60000	1,325,415.60	Open			
2	9132701000	REGIONAL BUILDING DEMOLITION A	1.0000	EA	9132701	66,270.78000	66,270.78	Open			
3	9132701000	REGIONAL BUILDING DEMOLITION A	1.0000	EA	9132701	-66,270.78000	-66,270.78	Open			



Creating Purchase Orders (continued)

CARDINAL Home | Work

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

New Window ? Help

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Dispatched ▲ ✖
 PO ID: 0001048123
 Copy From: Hold From Further Processing [Current Change Reason](#)

Header

*PO Date: 10/31/2012 Vendor Search
 Vendor: S B COX IN-001 [Vendor Details](#)
 *Vendor ID: 0000032186 S B COX INC
 *Buyer: MIKE HALL Hall, Mike (VDOT)
 PO Reference: REGIONAL BUILDING DEMOLITION A

Backorder Status: Not Backordered [Create BackOrder](#)
 Receipt Status: Not Recvd
 *Dispatch Method: Print
 eVA PO Type: ROT Routine Bill Vendor
 eVA Order Method: URL
 eVA Interfaced: SEVA
 eVA Dttm: 11/01/2012 9:00:18AM

Web IMS?:

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

Amount Summary

Merchandise: 1,325,415.60
 Freight/Tax/Misc.: 0.00
 Total Amount: 1,325,415.60 USD

Add Items From

Select Lines To Display
 Line: To:

Lines Customize | Find | View All | 📄 | 📊 | First 1-3 of 3 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	9132701000	REGIONAL BUILDING DEMOLITION A	1.0000	EA	9132701	1,325,415.60000	1,325,415.60	Open	<input type="button" value="🗨️"/>	<input type="button" value="🔍"/>	<input type="button" value="➕"/>	<input type="button" value="➖"/>
2	9132701000	REGIONAL BUILDING DEMOLITION A	1.0000	EA	9132701	66,270.78000	66,270.78	Open	<input type="button" value="🗨️"/>	<input type="button" value="🔍"/>	<input type="button" value="➕"/>	<input type="button" value="➖"/>
3	9132701000	REGIONAL BUILDING DEMOLITION A	1.0000	EA	9132701	-66,270.78000	-66,270.78	Open	<input type="button" value="🗨️"/>	<input type="button" value="🔍"/>	<input type="button" value="➕"/>	<input type="button" value="➖"/>



Creating Purchase Orders - Supplier Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Supplier Details** hyperlink takes you to the **Maintain Purchase Order – Supplier Details** page. This page allows you to view or edit the supplier **Location**, **Address**, **Contacts**, and payment terms.

For construction and professional services purchase orders, the **Terms** are set to **00 (Due Immediately)** and the **Basis Date Type** is set to **Inv Date**. For goods and services, the payment terms are set to **30 Days** and **Prompt Payment** type.

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

Maintain Purchase Order
Vendor Details -- S B COX INC

Business Unit: 50100 PO ID: 0001048123 Vendor: S B COX IN-001

*Location: MAIN

*Address: 4

Contact:

Salesperson:

Vendor Information

Terms: 00 Due Immediately

Basis Date Type: Inv Date

Address Details

Country: USA United States Prefix:

Address 1: P.O. BOX 7737 Fax: 804/222-7832

Address 2: 901 POTOMAC STREET Prefix: 1

Address 3: VA10053587 Phone: 804/222-3500

City: RICHMOND

County: 023899321 Postal: 23231

State: VA Virginia



Creating Purchase Orders - Header Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Header Details** hyperlink takes you to the **PO Header Details** page. This page displays the **Billing Location** which defaulted based on preconfigured Buyer preferences. You can view or edit the location as necessary.

The **PO Type**, **Currency Code**, and **Tax Exempt ID** should not be changed.

CARDINAL

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

Maintain Purchase Order

PO Header Details

Business Unit: 50100 PO ID: NEXT Vendor: LL CARTER -002

PO Details

Vendor: LL CARTER -002 PO Date: 04/08/2013

*PO Type: GEN

*Billing Location: CNTRL OF [Billing Address](#) Tax Exempt ID: 546001730

Origin: ONL Online Letter of Credit ID:

Currency

Currency Code: USD [Exchange Rate Detail](#) Base Currency: USD

Rate Date: 04/08/2013 Exchange Rate: 1.00000000

Rate Type: CRRNT

Process Control Option

Acknowledgements required for: Not required

Dispatch *Method: Print

OK Cancel Refresh



Creating Purchase Orders - PO Defaults

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **PO Defaults** hyperlink takes you to the **Purchase Order Defaults** page. This page displays the **Ship To** location which defaulted based on preconfigured Buyer preferences. You can view or edit the location as necessary.

In the **Default Options** section, you may set a **Default** chart of accounts for all line items on the PO or **Override** defaulting values or existing chart of accounts when copying in a PO.

In the **Schedule** section, the **Ship Via** and **Freight Terms Code** default and should generally not be changed.

Maintain Purchase Order
Purchase Order Defaults

Business Unit: 50100 PO ID: NEXT Vendor: LL CARTER -002

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: CNTRL OF2 Central Office - Annex

Due Date: []

Ship Via: COMMON

Arbitration: []

*Distribute By: Quantity

Ultimate Use Code: []

Original Promise Date: []

Freight Terms Code: FOB DEST

Freight Charge Method: []

[One Time Address](#)

Distribution

SpeedChart: []

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

Chartfields	Asset Information	Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
		1		50100					10003		

OK Cancel Refresh



Creating Purchase Orders - Line Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Line Details** icon to the left of each PO line takes you to the **Details for Line** page. This page allows you to see all information related to your PO line on just one page, instead of clicking through the tabs. Use the **Expand All** hyperlink to expand the page.

In this example, the **Amount Only** checkbox is checked.

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

Maintain Purchase Order
Details for Line 1

PO ID: 0001048123 Vendor: S B COX IN-001
Line: 1 Item ID: 9132701000 [REGIONAL BUILDING DEMOLITION A](#)

Line Details

Category:	9132701	Line Status:	Open	▲
Description:	CONSTRUCTION, HIGHWAY AND ROAD	Backorder Status:	Not Backordered	
Category ID:	04721	Amount Summary		
Amount to Receive:	1,325,415.600	USD	Merchandise Amount:	1,325,415.60 USD
Quantity to Receive:	1.0000		Doc. Base Amt:	1,325,415.60 USD

[Item Availability](#)

Transaction Item Description:
REGIONAL BUILDING DEMOLITION A

Preferred Language Item Description:
CONSTRUCTION, HIGHWAY AND ROAD CONSTRUCTION, HIGHWAY AND ROAD

[Expand All](#) [Collapse All](#)

Item Information

Vendor's Catalog:	<input type="text"/>	<input type="checkbox"/> Device Tracking
Vendor Item ID:	<input type="text"/>	
Manufacturer ID:	<input type="text"/>	
Description:	<input type="text"/>	
Manufacturer's Item ID:	<input type="text"/>	
UPN ID:		<input type="checkbox"/> Withholding
Replenish Code:	Standard	Withholding Code: <input type="text"/>

Attributes

Physical Nature:	Services	<input checked="" type="checkbox"/> Amount Only
*Price Qty:	Schedule Quantity	
*Price Date:	PO	

RFQ

RFQ ID: _____ Line: _____



Creating Purchase Orders - Line Details (continued)

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

Maintain Purchase Order
Details for Line 1

PO ID: 0001048123 Vendor: S B COX IN-001
Line: 1 Item ID: 9132701000 [REGIONAL BUILDING DEMOLITION A](#)

Line Details

Category:	9132701	Line Status:	Open	▲
Description:	CONSTRUCTION, HIGHWAY AND ROAD	Backorder Status:	Not Backordered	
Category ID:	04721	Amount Summary		
Amount to Receive:	1,325,415.600	USD	Merchandise Amount:	1,325,415.60 USD
Quantity to Receive:	1.0000		Doc. Base Amt:	1,325,415.60 USD

[Item Availability](#)

Transaction Item Description:
REGIONAL BUILDING DEMOLITION A

Preferred Language Item Description:
CONSTRUCTION, HIGHWAY AND ROAD CONSTRUCTION, HIGHWAY AND ROAD

[Expand All](#) [Collapse All](#)

Item Information

Vendor's Catalog:	<input type="text"/>	<input type="checkbox"/> Device Tracking
Vendor Item ID:	<input type="text"/>	
Manufacturer ID:	<input type="text"/>	<input type="checkbox"/> Withholding
Description:	<input type="text"/>	
Manufacturer's Item ID:	<input type="text"/>	Withholding Code: <input type="text"/>
UPN ID:	<input type="text"/>	
Replenish Code:	Standard	

Attributes



Creating Purchase Orders - Additional Details

After clicking on **Expand All** on the **Maintain Purchase Order – Line Details** page by scrolling down, you can see additional details related to the PO line.

Attributes

Physical Nature: Services Amount Only

*Price Qty: Schedule Quantity

*Price Date: PO

RFQ

RFQ ID: Line:

Contract

Contract SetID: STATE

Contract ID: A00099442R01

Contract Version: 1

Contract Line:

Category Line Number:

Group ID:

[Contract Details](#)

Milestone Line:

Release: 1

Receiving

*Receiving Required: Do Not Close Short

OK Cancel Refresh



Creating Purchase Orders - Copy From

From the **Maintain Purchase Order – Purchase Order** page, you can create a PO by copying it from an existing document using the **Copy From** drop-down menu.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Initial

PO ID: NEXT

Copy From: ▼ Header
Contract
Purchase Order
Requisition

Hold From Further Processing

*PO Date: [Vendor Search](#)

Vendor: [Vendor Details](#)

*Vendor ID:

*Buyer: YANI.HO [Ho, Yani \(VDOT\)](#)

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

[Header Details](#) [Activity Summary](#)

[PO Defaults](#)

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

[Add ShipTo Comments](#)



Creating Purchase Orders - Copy From (continued)

Steps to copy from an existing document:

- When copying from a **Requisition** or **Contract**, enter the **Supplier ID** first.
- Click the **Copy From** drop-down menu.
- Select the type of document to be copied from (**Contract**, **Purchase Order**, or **Requisition**). The **Copy Purchase Order from Requisition, Purchase Order**, or **Contract** page will open. When copying from a Contract, you will copy the entire contract. To copy only a single line from the contract, and for more details on creating POs, see the job aid titled **501 PR344: Purchase Orders**.
- When copying a line from a contract, note that the contract selection displays on one tab. After you complete the copy you can enter the **Contract ID** on the **Maintain Purchase Order – Purchase Order** page in the **Lines** section, **Contract** tab, to associate it to the contract.

Add Items From								
<u>Purchasing Kit</u>			<u>Catalog</u>			<u>Item Search</u>		
Lines								
<u>Details</u>	<u>Ship To/Due Date</u>	<u>Statuses</u>	<u>Item Information</u>	<u>Attributes</u>	<u>RFQ</u>	<u>Contract</u>	<u>Receiving</u>	
	SetID	Contract ID	Contract Version	Contract Line▲	Category Line	Release	Milestone Line	GPO ID
	STATE	<input type="text"/>		<input type="text"/>	<input type="text"/>			



Creating Purchase Orders - Copy From (continued)

After you select the type of document to be copied from, a search page appears. The page will be based on the type of document you have chosen to copy .

The screenshot displays the 'Maintain Purchase Order' interface with three overlapping search windows, each highlighted with a red border:

- Top Window: Copy Purchase Order from Requisition**
 - Buttons: [Return to Main Page](#)
 - Section: **Requisition Selection Criteria**
 - Fields: Business Unit, Vendor ID, Category, Requisition ID, Requisition Name, Contract ID
 - Button: **Search**
- Middle Window: Copy Purchase Order from Purchase Order**
 - Section: **PO Selection Criteria**
 - Fields: PO ID, Vendor, Vendor ID, Buyer, PO Reference, PO Date, Status, Origin
 - Button: **Search**
- Bottom Window: Copy Purchase Order from Contract**
 - Section: **Contract Selection Criteria**
 - Fields: Contract SetID (STATE), Contract ID, Vendor, Vendor ID, Master Contract
 - Checkbox: Allow Open Item Contract Only
 - Button: **Search**

The background interface includes a 'Select Requisition Lines' table with columns for 'Select', 'PO Qty', and 'PO U'. It also features a 'Copy To PO' button and a 'Select Contract' window with a table for selecting contracts based on SetID, Contract, Description, and Vendor ID.



Creating Purchase Orders - Copy From (continued)

Enter search criteria as required in the **Selection Criteria** section of the page and click the **Search** button.

The screenshot shows the 'Maintain Purchase Order' page with the 'Copy Purchase Order from Requisition' section. The 'Requisition Selection Criteria' section contains several input fields and checkboxes. The 'Business Unit' field is set to '50100' and the 'Vendor ID' field is set to '0000033093'. The 'Search' button is highlighted with a red box. Below the search criteria, there are navigation controls and a 'Select Requisition Lines' table. The table has columns for 'Select', 'PO Qty', 'PO UOM', 'Item', 'Description', 'Req ID', 'Procurement Card', 'Calc Price', and 'Schedule Split'. The 'Select' column has a checkbox, and the 'Description' and 'Req ID' columns have links labeled 'Descr' and 'Req ID' respectively. Below the table, there are 'Select All' and 'Clear All' checkboxes, a 'Copy To PO' button, and 'Save', 'Notify', and 'Refresh' buttons. At the bottom right, there are 'Add' and 'Update/Display' buttons.

Requisition Selection Criteria

Business Unit: 50100
Vendor ID: 0000033093
Category:
Requisition ID:
Requisition Name:
Contract ID:
Search

Buyer:
Origin:
Max Rows: 20
 Include Reqs With No Vendor
 Include Inventory Items
 Exclude Auto Source Item

21 to 40 of 708

Select Requisition Lines

Select	PO Qty	PO UOM	Item	Description	Req ID	Procurement Card	Calc Price	Schedule Split
<input type="checkbox"/>				Descr	Req ID			

Select All Clear All

Copy To PO

Save Notify Refresh Add Update/Display



Creating Purchase Orders - Copy From (continued)

After you click the **Search** button, the items matching your search criteria appear in the list at the bottom of the page. Review the items and click the checkbox in the **Select** column for each item you want to copy. You can copy multiple items, such as multiple lines, if desired.

After selecting the items to be copied, click the **Copy to PO** button.

The screenshot shows the 'Maintain Purchase Order' page with the 'Copy Purchase Order from Requisition' sub-page. The 'Requisition Selection Criteria' section includes fields for Business Unit (50100), Vendor ID (0000033093), Category, Requisition ID (0002033080), Requisition Name, and Contract ID. There are also fields for Buyer, Origin, and Max Rows (20). Checkboxes for 'Include Reqs With No Vendor', 'Include Inventory Items', and 'Exclude Auto Source Item' are present. A 'Search' button is located below these fields.

The 'Select Requisition Lines' table is displayed below, with the following data:

Select	PO Qty	PO UOM	Item	Description	Req ID	Procurement Card	Calc Price	Schedule Split
<input checked="" type="checkbox"/>	400.0000	LTN	7503565400	STONE_MISCELLANEOUS GABION	0002033080	12	Y	

Below the table, there are 'Select All' and 'Clear All' buttons. A 'Copy To PO' button is highlighted with a red box. At the bottom, there are 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display' buttons.



Creating Purchase Orders - Copy From (continued)

The **Purchase Order** page returns with the item(s) you selected copied in.

CARDINAL Home | Worklist
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs
New Window | Help

Maintain Purchase Order

Purchase Order

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

Header

*PO Date: 03/25/2013
Vendor: LL CARTER -002
*Vendor ID: 0000033093
*Buyer: MIKE.HALL
PO Reference:
Web IMS?:

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

Amount Summary

Merchandise: 10,824.00
Freight/Tax/Misc.: 0.00
Total Amount: 10,824.00 USD

Add Items From

Purchasing Kit Catalog Item Search

Lines Customize | Find | View All | First | 1 of 1 | Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	7503565400	STONE,	400.0000	LTN	7503565	27.06000	10,824.00	Open			

View Approvals *Go to:



Creating Purchase Orders - Copy From (continued)

After you copy the existing document information into the PO, you will probably need to add or change some information, such as:

- Update the **Buyer**
- Date values which default and are not copied into the PO
- Shipping and freight information that defaulted from the copied document
- Schedule and distribution that defaulted from the copied document
- Enter the **Quantity** or **Amount**

Note: When copying from a contract, note that the contract selection displays on one tab. The contract number can be entered on the PO line to associate it to the contract.

After you update the fields as needed, click **Save** and a new PO is created. A PO ID is generated by Cardinal.



Creating Purchase Orders - Items

Once the PO **Header** section is complete, identify the items that need to be associated with the PO.

The **Lines** section contains links that allow you to select items for the PO. You can add or delete items in this section. Items can be selected or added by:

- Key in, or look up, the National Institute of Governmental Purchasing (NIGP) Item number, i.e., **Item**. This is the most common method to select an **Item**. On each line, click on the magnifying glass next to the **Item** field. The items listed will be narrowed down to items related to the supplier you previously selected. The **UOM** and **Description** field values default from the item table.
- Key in or look up the NIGP Category, i.e. **Category**. On each line, click on the magnifying glass next to the **Category** field. This method will not be limited to items related to the chosen supplier. You will need to complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

Maintain Purchase Order
Purchase Order

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

Header
*PO Date: 03/25/2013 Vendor Search
Vendor: LL CARTER -002 Vendor Details
*Vendor ID: 0000033093 LL Carter & Son Inc
*Buyer: MIKE HALL Hall, Mike (VDOT)
PO Reference: [Text Field]
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: [Text Field]

Amount Summary
Merchandise: 10,824.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 10,824.00 USD

Add Items From
Purchasing Kit Catalog Item Search

Lines
Customize | Find | View All | First | 1 of 1 | Last

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	7503565400	STONE	400.0000	LTN	7503565	27.06000	10,824.00	Open

View Approvals Close Short All Lines *Go to: ... More ...
Save Notify Refresh Add Update/Display



Creating Purchase Orders - Items

Close short processing is not used. Do not use the **Close Short All Lines** button.

The accounting distribution can be accessed from the **Maintain Purchase Orders – Purchase Order** page by clicking the - **Schedule** icon. From the **Schedules** page, click the **Distribution** icon. Click the **Distributions/ChartFields** icon.

Maintain Purchase Order
Purchase Order

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

Header

*PO Date: 03/25/2013 Vendor Search
Vendor: LL CARTER -002 Vendor Details
*Vendor ID: 0000033093 LL Carter & Son Inc
*Buyer: MIKE HALL Hall, Mike (VDOT)
PO Reference:

Web IMS?:

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

Amount Summary

Merchandise: 10,824.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 10,824.00 USD

Add Items From
Purchasing Kit Catalog Item Search

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503565400	STONE	400.0000	LTN	7503565	27.0600	10,824.00	Open

View Approvals *Go to:



Creating Purchase Orders - Items (continued)

Maintain Purchase Order

Purchase Order

Business Unit: 5010
 PO ID: NEXT

PO Status: Open

Copy From:

Hold From Further Processing

Header

*PO Date: 03/25/2013 [Vendor Search](#)
 Vendor: LL CARTER -002 [Vendor Details](#)
 *Vendor ID: 0000033093 [LL Carter & Son Inc](#)
 *Buyer: MIKE.HALL [Hall, Mike \(VDOT\)](#)
 PO Reference:

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

Web IMS?:

[Header Details](#) [Activity Summary](#)
[PO Defaults](#)
[PO Activities](#) [Add Comments](#)
 [Add ShipTo Comments](#)

Amount Summary

Merchandise: 10,824.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 10,824.00 USD

Add Items From

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

Lines

Customize | Find | View All | First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	7503565400	STONE,	400.0000	LTN	7503565	27.06000	10,824.00	Open

View Approvals *Go to:



Creating Purchase Orders - Distributions

A schedule may have one or more accounting distributions. ChartField values determine what fund, account, department, etc. the schedule amount is charged to. If a PO line needs to use multiple SpeedCharts, click on the **Multi-SpeedCharts** link and split as necessary.

Do not split or add additional schedules for a PO line. There should be only one schedule per PO line.

Maintain Purchase Order
Distributions for Schedule 1

Unit: 50100 Vendor: LL CARTER -002
PO ID: NEXT Item: 7503565400 [STONE_MISCELLANEOUS GABION](#)
Line: 1 Status: Active
Schedule: 1

*Distribute By: Quantity
*Liquidate by: Amount
SpeedChart: [Multi-SpeedCharts](#)

Schedule Qty: 400.0000
Merchandise Amount: 10,824.00 USD
Doc. Base Amount: 10,824.00 USD

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Cen
1	Open	100.0000	400.0000	10,824.00	USD	50100		5012550	04100	604005	18002	1119001

OK Cancel Refresh



Creating Purchase Orders - Distributions (continued)

Maintain Purchase Order
Distributions for Schedule 1

Unit: 50100 Vendor: LL CARTER -002
PO ID: NEXT Item: 7503565400 [STONE, MISCELLANEOUS GABION](#)
Line: 1 Status: Active
Schedule: 1

*Distribute By: Quantity
*Liquidate by: Amount
SpeedChart: [Multi-SpeedCharts](#)

Schedule Qty: 400.0000
Merchandise Amount: 10,824.00 USD
Doc. Base Amount: 10,824.00 USD

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

Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Cen
1	Open	100.0000	400.000	10,824.00	USD	50100		5012550	04100	604005	18002	1119001

OK Cancel Refresh



Creating Purchase Orders – Send for Approval

After you update the fields, return to the **Maintain Purchase Order – Purchase Order** page, click **Save**, and your PO is saved. A **PO ID** value will be generated. The final step is to send the PO forward for supervisor approval.

- Click the **PO Approval** check mark. The checkmark will disappear and the words **Pend Appr** will appear.

Maintain Purchase Order
Purchase Order

Business Unit: 50100
PO ID: 0001041549

PO Status: Open

Copy From:

Hold From Further Processing

Header

*PO Date: 11/29/2012 [Vendor Search](#)
Vendor: LL CARTER -001 [Vendor Details](#)
*Vendor ID: 0000033093 [LL Carter & Son Inc](#)
*Buyer: MIKE.HALL [Hall, Mike \(VDOT\)](#)
PO Reference: SAND

Receipt Status: Not Recvd
*Dispatch Method: Print
eVA PO Type: R01 [Routine Bill Vendor](#)
eVA Order Method: PRNT [PRNT](#)

PO Status: **Pend Appr**



Simulation: Creating a Purchase Order

You are now about to view a simulation entitled **Creating a Purchase Order**. Click the Cardinal logo below to start the simulation.





Managing eVA Purchase Orders

eVA Direct Orders (DOs) are loaded directly into Cardinal, where corresponding purchase orders are created. This allows for receiving and vouchering to occur.

The end user must update the PO with a valid Chart of Accounts and Buyer name. Important PO field information includes:

- **PO ID:** When an eVA PO is loaded into Cardinal, it is assigned a **PO ID**.
- **Purchase Order Reference:** The eVA PO number is loaded into the **Purchase Order Reference** field, which can be used to search for the PO.
- **Buyer:** The **Buyer** name assigned to the PO is **EVA BUYER** when the PO is first loaded. The **Buyer** should update this name to their own name.

Purchase Order

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

Find an Existing Value Add a New Value

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

Business Unit: = 50100

PO ID: begins with

Purchase Order Date: =

PO Status: =

Short Vendor Name: begins with

Vendor ID: begins with

Vendor Name: begins with

Buyer: begins with EVA.BUYER

Buyer Name: begins with

PO Type: =

Purchase Order Reference: begins with

Hold From Further Processing

Case Sensitive



Managing eVA Purchase Orders (continued)

Changing the **Buyer** value prompts a message to appear, asking if you want to change the default **Ship To**, **Department ID**, **Location**, and **Origin** values. Click **Cancel** to maintain the prior default values.

The screenshot displays the 'Maintain Purchase Order' interface in the CARDINAL system. The main form shows the following details:

- Business Unit:** 50100
- PO ID:** 0001044223
- PO Status:** Approved
- Copy From:** [Dropdown menu]
- Header:**
 - *PO Date:** 10/04/2012
 - Vendor:** JAMES RIVER SO
 - *Vendor ID:** 0000015978
 - *Buyer:** john
 - PO Reference:** DO1532439
- Web IMS?:**
- Receipt Status:** Not Recd

A 'Message' dialog box is overlaid on the screen, containing the following text:

Changing Buyer will change the default values ShipTo ID to STAUN ADM Dept ID to 18006 Location to STAUN ADM2 Origin to ONL, continue to retrofit the default values? (10200,290)

Changing Buyer will change the default values. Press OK to continue retrofit all new default values to schedules and distributions. Press Cancel to retain the original ShipTo, Department ID, Location and Origin.

The dialog box has two buttons: 'OK' and 'Cancel'. The 'Cancel' button is highlighted with a red rectangle.

At the bottom of the form, the **Total Amount:** is 3,698.84 USD.



Managing eVA Purchase Orders (continued)

To complete the PO, the **Buyer** must enter the accounting distribution for each line on the PO. You can click the **PO Defaults** link to enter the accounting distribution for all lines. Or, you may update the distributions for each PO line one at a time by clicking on the **Schedule** icon at the end of each PO line and then clicking on the **Distribution** icon at the end of the schedule line.

The screenshot shows the 'Maintain Purchase Order' page in the CARDINAL system. The page title is 'Purchase Order' and the status is 'Approved'. The business unit is 50100 and the PO ID is 0001044223. The vendor is JAMES RIVER SO and the buyer is MIKE.HALL. The PO reference is DO1532439. The page includes sections for 'Header Details', 'Receipt Status', 'Amount Summary', and 'Select Lines To Display'. The 'PO Defaults' link is highlighted with a red box. The 'Amount Summary' shows a total amount of 3,698.84 USD. The 'Select Lines To Display' section has a 'Retrieve' button.

Business Unit: 50100
PO ID: 0001044223
Copy From: [Dropdown]
PO Status: Approved ✖
 Hold From Further Processing

Header

*PO Date: 10/04/2012 [Vendor Search](#)
Vendor: JAMES RIVER SO [Vendor Details](#)
*Vendor ID: 0000015978 [James River Solutions](#)
*Buyer: MIKE.HALL [Hall, Mike \(VDOT\)](#)
PO Reference: DO1532439

Receipt Status: Not Recvd
*Dispatch Method: Phone [Dispatch](#)
eVA PO Type: EVP eVA Purchase Order
eVA Order Method: EXCP [eVA Interfaced:](#) Y [eVA Dttm:](#) 10/05/2012 7:04:54AM
eVA PO ID: DO1532439

Amount Summary

Merchandise: 3,698.84
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 3,698.84 USD

Select Lines To Display

Line: [Input] [To:](#) [Input] [Retrieve](#)

Header Details

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

Add Items From

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

Customize | Find | View All | First 1-3 of 3 Last



Managing eVA Purchase Orders (continued)

CARDINAL Home | Worklist

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

New Window ? Help

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Approved ✘
 PO ID: 0001044223
 Hold From Further Processing

Copy From:

Header

*PO Date: 10/04/2012 [Vendor Search](#)
 Vendor: JAMES RIVER SO [Vendor Details](#)
 *Vendor ID: 0000015978 [James River Solutions](#)
 *Buyer: MIKE.HALL Hall, Mike (VDOT)
 PO Reference: DO1532439

Receipt Status: Not Recvd
 *Dispatch Method: Phone
 eVA PO Type: EVP eVA Purchase Order
 eVA Order Method: EXCP
 eVA Interfaced: Y
 eVA Dttm: 10/05/2012 7:04:54AM
 eVA PO ID: DO1532439

Web IMS?:

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

Amount Summary

Merchandise: 3,698.84
 Freight/Tax/Misc.: 0.00
 Total Amount: 3,698.84 USD

Add Items From

Select Lines To Display
 Line: To:

Lines Customize | Find | View All | First 1-3 of 3 Last



Managing eVA Purchase Orders – PO Defaults

Enter the accounting distribution for all PO lines by entering the information on the **Maintain Purchase Order - Purchase Order Defaults** page. Click **OK**. The **Maintain Purchase Order - Retrofit** field changes to "all" existing PO lines/schedules/distributions..... page will open.

Maintain Purchase Order
Purchase Order Defaults

Business Unit: 50100 PO ID: 0001044223 Vendor: JAMES RIVER SO

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: Ultimate Use Code:
Due Date: Original Promise Date:
Ship Via: Freight Terms Code:
Arbitration: Freight Charge Method:
*Distribute By: Quantity [One Time Address](#)
*Liquidate by: Amount

Distribution

SpeedChart:

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

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
1		50100							

OK Cancel Refresh



Managing eVA Purchase Orders - Distributions

On the **Maintain Purchase Order - Retrofit field changes to "all" existing PO lines/schedules/distributions.....** page:

- Select the **Apply to All Distributions** checkbox next to all ChartField values you want applied to all distributions lines.
- If a value cannot be selected to **Apply to All Distributions**, be sure to Click the **Apply** checkbox to include it.
- Click **OK**.

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

Maintain Purchase Order

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

Business Unit: 50100 PO ID: 0001138319 Vendor: LL CARTER -003

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 Customize | Find | View All | First 1-5 of 5 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>	1	Pct	100	
<input type="checkbox"/>	1	Fund	04100	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Program	699001	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Department		<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Cost Center	11120010	<input checked="" type="checkbox"/>

Select All Clear All



Managing eVA Purchase Orders– Distributions (continued)

Once you have added the distribution values:

- Deselect the **Hold From Further Processing** checkbox.
- Click **Save**.

Purchase Order

Business Unit: 50100
PO ID: 0001044223
Copy From: [Dropdown]
PO Status: Approved

Hold From Further Processing

Header

*PO Date: 10/04/2012
Vendor: JAMES RIVER SO
*Vendor ID: 0000015978
*Buyer: MIKE.HALL
PO Reference: DO1532439

Receipt Status: Not Recvd
*Dispatch Method: Phone
eVA PO Type: EVP
eVA Order Method: EXCP
eVA Interfaced: Y
eVA Dttm: 10/05/2012 7:04:54AM
eVA PO ID: DO1532439

Amount Summary

Merchandise: 3,698.84
Freight/Tax/Misc.: 0.00
Total Amount: 3,698.84 USD

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	4050935800	1200gal Premium	1200.0000	1G	4050935	3.04430	3,653.16	Approved
2	4050935800	LUST, OIL SPILL,	1200.0000	1G	4050935	0.00890	10.68	Approved
3	4050935800	AST fee	1.0000	EA	4050935	35.00000	35.00	Approved

Save Return to Search Notify Refresh



Managing eVA Purchase Orders (continued)

eVA Direct Orders (DOs) come into Cardinal with an **Approved** status. Material modifications (such as adding a line, changing quantities or prices, etc.) made to an eVA PO are not done in Cardinal. When changes are required, they must be performed on the PO in eVA, and then the PO change order will be interfaced back to Cardinal.

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. Dispatching POs is discussed later in the course.

Purchase Order

Business Unit: 50100 PO ID: 0001044223 PO Status: Approved ✖

Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 10/04/2012 [Vendor Search](#)
Vendor: JAMES RIVER SO [Vendor Details](#)
*Vendor ID: 0000015978 [James River Solutions](#)
*Buyer: MIKE HALL [Hall, Mike \(VDOT\)](#)
PO Reference: DO1532439

Receipt Status: Not Recvd
*Dispatch Method: Phone [Dispatch](#)
eVA PO Type: EVP eVA Purchase Order
eVA Order Method: EXCP
eVA Interfaced: Y
eVA Dtm: 10/05/2012 7:04:54AM
eVA PO ID: DO1532439

Web IMS?:

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

Amount Summary

Merchandise: 3,698.84
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 3,698.84 USD

Add Items From [Purchasing Kit](#) [Catalog](#) [Item Search](#)

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

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	4050935800	1200gal Premium	1200.0000	1G	4050935	3.04430	3,653.16	Approved			
2	4050935800	LUST, OIL SPILL	1200.0000	1G	4050935	0.00890	10.68	Approved			
3	4050935800	AST fee	1.0000	EA	4050935	35.00000	35.00	Approved			

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

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



Submitting Purchase Orders for Approval

POs created without a requisition require an approval.

POs created from a requisition or awarded from a Strategic Sourcing event are built with an approved status, since they have already been approved.

POs interfaced from eVA are loaded with an approved status, since the POs were created in eVA and have already been approved.



Submitting Purchase Orders for Approval (continued)

Email notifications, with links to their worklists, are sent to Supervisors notifying them that POs require their approval.

Supervisors are also notified via their worklists in Cardinal. From their worklists, Supervisors can click the link next to the PO that requires approval. This link takes them to the **Purchase Order Approval** page, where they can Approve, Deny, or Hold the PO. The Supervisor clicks the desired button at the bottom of the page to approve, hold or deny the PO. If the Supervisor denies the PO, it is routed back to the Buyer to be updated or cancelled.

Cardinal sends a reminder email if the PO is not worked within 24 hours. POs must be approved within 48 hours, or the PO is routed to the Supervisor's Supervisor.

For detailed information on PO approvals, refer to the course titled **501 PR343: Procurement Approvals**.

The screenshot shows the 'Purchase Order Approval' page in the Cardinal system. At the top, there is a header with the Cardinal logo and navigation links. Below the header, the page title is 'Purchase Order Approval'. The main content area is divided into several sections:

- Business Unit:** 50100
- PO ID:** 0001041544
- PO Total:** 49.00 USD
- Vendor ID:** 0000033093 LL Carter & Son Inc
- Buyer:** MIKE.HALL
- PO Reference:**
- PO Status:** Pend Appr
- PO Date:** 09/28/2012
- Budget Status:** Valid
- Justification:** No justification entered by buyer.

Below this information is a table titled 'Review Lines' with the following data:

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	STONE RIP RAP CLASS II	0.5000	LTN	23.00000	11.50	USD
<input type="checkbox"/>	2	STONE NO. 8, STONE	0.5000	LTN	12.00000	6.00	USD
<input type="checkbox"/>	3	STONE NO. 8, STONE	0.5000	LTN	32.00000	16.00	USD
<input type="checkbox"/>	4	STONE NO. 57, STONE	0.5000	LTN	31.00000	15.50	USD

Below the table are buttons for 'Select All / De-select All' and 'View Lines Details'. The next section is 'Review / Edit Approvers', which includes a 'PO/CO for Supervisor Action' area. This area shows a 'Pending' status for 'Purchase Order 0001041544' and a list of approvers, including 'McCracken, Stacy (VDOT)'. At the bottom of the page, there are three buttons: 'Approve', 'Hold', and 'Deny', which are highlighted with a red box. A 'Return to Worklist' link is also present at the bottom left.



Dispatching and Printing Purchase Orders

Approved POs must be dispatched. A dispatched PO sets flags so the PO can be received and vouchered against. Dispatching a PO does not send the PO to the supplier.

Dispatching the PO involves either the Buyer running the PO Dispatch process from the **Maintain Purchase Order - Purchase Order** page or letting the batch process automatically dispatch the PO.

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. This process involves the following steps:

- **PO Dispatch** is a batch process that runs throughout the day.
- The status of the PO changes to **Dispatched**.
- The Buyer can print out the PO, or if the eVA order method is **URL**, the PO is sent to the supplier by eVA.

All POs are interfaced to eVA, except POs with eVA order method of **Exception** and originating in eVA.



Dispatching and Printing Purchase Orders (continued)

You may dispatch a PO by either going to the **Maintain Purchase Order - Purchase Order** page and clicking on the **Dispatch** button, or by waiting for the automatic dispatch process to be run.

Maintain Purchase Order

Purchase Order

Business Unit: 50100
PO ID: 0001044223
Copy From: [dropdown]

PO Status: Approved ✘
Budget Status: Valid
 Hold From Further Processing

Header

*PO Date: 10/04/2012 [Vendor Search](#)
Vendor: JAMES RIVER SO [Vendor Details](#)
*Vendor ID: 0000015978 [James River Solutions](#)
*Buyer: MIKE HALL [Hall, Mike \(VDOT\)](#)
PO Reference: DO1532439

Web IMS?:

Receipt Status: Not Recvd
*Dispatch Method: Print [dropdown] **Dispatch**
eVA PO Type: EVP eVA Purchase Order
eVA Order Method: EXCP [?](#)
eVA Interfaced: Y [?](#)
eVA Dttm: 10/05/2012 7:04:54AM
eVA PO ID: DO1532439

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

Amount Summary



Dispatching and Printing Purchase Orders (continued)

A dispatched printed PO has a place for the Buyer's signature. You can navigate to the **Dispatch POs** page using the following path:

Main Menu > Purchasing > Purchase Orders > Dispatch POs

- Enter the **Business Unit** and **PO ID**.
- Check the **Print BU Comments** and **Print PO Item Description** checkbox.
- You have the option to print another copy, by clicking the **Print Copy** checkbox.
- Click **Run**.

Dispatch POs

Run Control ID: PRINT_PO Report Manager Process Monitor Run

Language: English Specified Recipient's

Process Request Parameters

Business Unit: 50100 To: 50100
PO ID: 0001047342 Select Purchase Order

PO Status: Dispatched

Contract SetID:
Contract ID:
Release:
From Date:
Through Date:
Vendor ID:
Buyer:
Fax Cover Page:
Template ID:

Statuses to Include

Approved Dispatched Pending Cancel

Dispatch Methods to Include

Print FAX EDX E-Mail Phone

Miscellaneous Options

*Chartfields: Recycled AND Valid Chartfields
Change Orders: Changed and UnChanged Orders

Print Changes Only
 Test Dispatch
 Print Copy

Print BU Comments
 Print PO Item Description
 Print Duplicate

Sort By: Sort by Line Number



Dispatching and Printing Purchase Orders (continued)

You can also print a PDF version of the PO, as a copy only. This printed version does not have a **Buyer** signature box.

You can navigate to the **Print POs** page using the following path:

Main Menu > Purchasing > Purchase Orders > Review PO Information > Print POs

The screenshot shows the 'Print POs' interface in the CARDINAL system. The breadcrumb navigation at the top reads: Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Print POs. The page title is 'Print POs'. Below the title, there are controls for 'Run Control ID' (set to PRINT_PO), 'Language' (set to English), and radio buttons for 'Specified' (selected) and 'Recipient's'. A 'Run' button is present. The interface is divided into two main sections: 'Report Request Parameters' and 'Statuses to Include'. The 'Report Request Parameters' section includes fields for Business Unit (50100), PO ID (0001050510), Contract SetID, Contract ID, Release, From Date, Through Date, Vendor ID, and Buyer. The 'Statuses to Include' section has checkboxes for Approved, Dispatched, Canceled, Open, Pending, and Completed. Below this is the 'Miscellaneous Options' section, which includes dropdowns for Hold Status (On Hold AND Not On Hold), Chartfields (Recycled AND Valid Chartfields), and Change Orders (Changed and UnChanged Orders). There are also checkboxes for 'Print Changes Only', 'Print PO Item Description' (checked), and 'Print Duplicate'. A 'Number Of Copies' field is set to 1, and the 'Sort By' dropdown is set to 'Sort by Line Number'. At the bottom of the page, there are buttons for Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.



Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material.

Answer the review questions below:

1. Material changes to POs interfaced from eVA into Cardinal are completed in eVA.
 - a) True
 - b) False

2. Once the creation of the PO is started, you can identify the following and associate to the PO (select all that apply):
 - a) Items
 - b) Suppliers
 - c) Pricing
 - d) Comments
 - e) Approvers

3. Match the correct answer to each question:
 - a) POs created without a requisition _____
 - b) POs interfaced from eVA _____
 - c) POs created by the purchase order build process from a requisition_____

Answers:

- 1) are loaded with an approved status.
- 2) require an approval.
- 3) are built with an approved status.





Lesson 2: Summary

In this lesson, you learned:

- You can create a PO without a requisition by awarding a Strategic Sourcing event or by copying a requisition, purchase order, or contract.
- POs that you create without a requisition require approval.
- POs created by the PO build process from a requisition are built with an **Approved** status.



Lesson 3: Maintain and Modify Purchase Orders (Change Orders)

This lesson covers the following topics:

- Create Change Orders for Purchase Order
- Approve Change Orders
- Purchase Order – Modify Accounting Distribution
- Change Order Helpful Hints



Create Change Orders for a PO

Except if interfaced from eVA or SiteManager, a change order is created manually when a dispatched PO requires modifications that affect any of the following:

- PO quantities
- Dollar values
- Shipping / billing addresses
- Add / cancel line items

In addition, since suppliers and agencies are charged eVA fees based on the values of a PO, all PO's must be reconciled to match the received and paid amounts. If an update is needed based on the reconciliation, it also creates a change order.

To make a change to a PO that has been dispatched, i.e., change order, use the **Add/Update POs** pages using the following path:

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

Using the **Find Existing** tab, search for the PO you wish to change.

Maintain Purchase Order

Purchase Order

Business Unit: 50100
PO ID: 0001049185
PO Status: Dispatched ▲ ✕

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

Header

*PO Date: 11/08/2012 Vendor Search
Vendor: NICKELSTON-001 [Vendor Details](#)
*Vendor ID: 0000049586 Nickelston Industries Inc
*Buyer: MIKE HALL [Hall, Mike \(VDOT\)](#)
PO Reference: ON CALL GUARDRAIL REPAIR INTER

Web IMS?:

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

Backorder Status: Not Backordered [Create BackOrder](#)
Receipt Status: Not Recvd
*Dispatch Method: [Dispatch](#)
eVA PO Type: R01 [Routine Bill Vendor](#)
eVA Order Method: URL [URL](#)
eVA Interfaced: SEVA [SEVA](#)
eVA Dttm: 11/09/2012 9:00:36AM

Amount Summary

Merchandise: 530,739.00
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 530,739.00 USD

Add Items From [Purchasing Kit](#) [Catalog](#) [Item Search](#)

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

Lines

Line	Item	Description	Status	Backorder Status		
1	9137101000	ON CALL GUARDRAIL REPAIR INTER	Open	Not Backordered	▲	+
2	9137101000	ON CALL GUARDRAIL REPAIR INTER	Open	Not Backordered	▲	+
3	9137101000	ON CALL GUARDRAIL REPAIR INTER	Open	Not Backordered	▲	+

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



Create Change Orders for a PO (continued)

There are several ways to create a change order from the **Maintain Purchase Order – Purchase Order** page:

- Click the blue triangle in the top right corner to change header information.
- Add a line / cancel a line using the +/- icons to the right of the line.
- Change the quantity or price on a PO line or PO schedule.
- Click the blue triangle on the **Lines – Statuses** tab to change line information.
- Click the blue triangle on the **Maintain Purchase Order - Schedules** page to make changes to a line schedule. You can navigate to this page by clicking on the **Schedule** icon.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Dispatched  

PO ID: 1013920

Copy From:

Hold From Further Processing

Header

*PO Date: 03/24/2015 Vendor Search

Vendor: FLINT TRADING Vendor Details

*Vendor ID: 0000043494 FLINT TRADING INC

*Buyer: YANI.HO Ho, Yani (VDOT)

PO Reference:

Web IMS?:

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

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

Receipt Status: Not Recvd

*Dispatch Method: Print

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: URL

eVA Interfaced: SEVA

eVA Dttm: 03/24/2015 2:00:54PM

Amount Summary

Merchandise: 1,329.40

Freight/Tax/Misc.: 0.00

Total Amount: 1,329.40 USD

Add Items From

Purchasing Kit Catalog Item Search

Select Lines To Display

Line: To:

Lines  

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

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status		
1	5503649300	THERMOPLASTIC PAVEMENT MARKING MATERIAL PER VADOT HANDICAP, 39 IN., 125 MIL, NON-PREHEATED THERMOPLASTIC	20.0000	EA	5503649	66.47000	1,329.40	Approved		

View Approvals *Go to:

Do not change the price on a line that has been received against.

Once you make your changes and **Save**, the change order is ready for dispatch, or will be submitted for approval.



Create Change Orders for a PO (continued)

From the **Maintain Purchase Order – Purchase Order** page, click on the **Schedule** icon to jump to the **Maintain Purchase Order - Schedules** page. Click on the **Blue Triangle** icon to modify the schedule **Due Date** or **Ship To** fields.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	5503649300	THERMOPLASTIC PAVEMENT MARKING MATERIAL PER VADOT HANDICAP, 39 IN., 125 MIL, NON-PREHEATED THERMOPLASTIC	20.0000	EA	5503649	66.47000	1,329.40	Approved			

Maintain Purchase Order

Schedules

Unit: 50100 Vendor: FLINT TRADING PO Status: Dispatched
PO ID: 1013920 PO Date: 03/24/2015

[Return to Main Page](#)

Line	Item	Description	PO Qty	UOM	Merchandise Amt
1	5503649300	THERMOPLASTIC PAVEMENT MARKING MATERIAL PER VADOT HANDICAP, 39 IN., 125 MIL, NON-PREHEATED THERMOPLA	20.0000	EA	1,329.40 USD

Sched	Due Date	Ship To	Status			
1	03/24/2015	NOVA TFO	Active			

Add ShipTo Comments



Create Change Orders for a PO (continued)

From the **Maintain Purchase Order - Purchase Order** page you may increase or decrease the quantity of a PO:

- Click on the **Change Order** icon, i.e., the blue triangle, in the top right hand corner of the **Maintain Purchase Order - Purchase Order** page. The **Maintain Purchase Order - Purchase Order** page remains displayed and you may make changes.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Dispatched

PO ID: 0000523347

Copy From:

Hold From Further Processing

Header

*PO Date: 07/01/2011 Vendor Search

Vendor: BRANDYWINE-003 [Vendor Details](#)

*Vendor ID: 0000058196 BRANDYWINE PROPERTIES MANAGEMENT LP

*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: Req Id 0001603415

Web IMS?:

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

Receipt Status: Partial

*Dispatch Method:

eVA PO Type: R01 Routine Bill Vendor

*eVA Order Method: URL

eVA Interfaced: SEVA

eVA Dttm:

Amount Summary

Merchandise: 7,372,498.00

Freight/Tax/Misc.: 0.00

Total Amount: 7,372,498.00 USD

Add Items From

Purchasing Kit Catalog Item Search

Select Lines To Display

Line: To:

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	9996440000	Annual Base Costs	56.0000	EA	9996440	131,651.7500	7,372,498.00	Approved				

[View Approvals](#) *Go to:



Create Change Orders for a PO (continued)

On the **Maintain Purchase Order - Purchase Order** page:

- Make the needed changes to the existing line(s). In this example the **PO Qty** is increased from **56** to **60**.
- Click **Save**.

The screenshot shows the 'Maintain Purchase Order - Purchase Order' page. The 'Lines' table is visible, showing a single line with the following details:

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	9996440000	Annual Base Costs	60.0000	EA	9996440	131,651.7500	7,899,105.00	Approved

The 'Save' button is highlighted with a red box. Other buttons include 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

The **Change Reason** page displays:

- Enter a **Reason Code** and **Comment**, to explain the change(s).
- Click **OK**.

The screenshot shows the 'Change Reason' page. The 'Reason Code' is 'QUANTITY' and the 'Comment' is 'Increased quantity from 56 to 60 months. MJH 5/23/14'. The 'OK' button is highlighted with a red box. Other buttons include 'Cancel' and 'Refresh'.



Create Change Orders for a PO (continued)

Upon **Save** a **Change Order** number displays, fields are updated, and amounts recalculated.

In the example below the PO value did not increase by more than 25% and therefore its status remains **Approved**. See the section in this lesson titled Change Order Helpful Hints for additional details on change order approval processing.

- The **Dispatch Method** defaults to **Print**.
- Click on the **Dispatch** button.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Approved

PO ID: 0000523347

Change Order: 1

Copy From: [Dropdown] Hold From Further Processing Current Change Reason

Header

*PO Date: 07/01/2011 Vendor Search

Vendor: BRANDYWINE-003 Vendor Details

*Vendor ID: 0000058195 BRANDYWINE PROPERTIES MANAGEMENT LP

*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: Req Id 0001603415

Web IMS?:

Backorder Status: Not Backordered Create BackOrder

Receipt Status: Partial

*Dispatch Method: Print Dispatch

eVA PO Type: R01 Routine Bill Vendor

*eVA Order Method: URL

eVA Interfaced: RSEV

eVA Dttm:

Amount Summary

Merchandise: 7,899,105.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 7,899,105.00 USD

Add Items From Purchasing Kit Catalog Item Search

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

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	9996440000	Annual Base Costs	60.0000	EA	9996440	131,651.7500	7,899,105.00	Approved

View Approvals Close Short All Lines *Go to: [Dropdown]

Save Return to Search Notify Refresh Add Update/Display



Create Change Orders for a PO (continued)

The **Dispatch Options** page displays:

- Check **Print BU Comments** to display line and header comments, to include eVA terms and conditions.
- Click **OK**.

The screenshot shows the 'Dispatch Options' page in the CARDINAL system. The page has a blue header with the CARDINAL logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the header is a breadcrumb trail: Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs. There are also links for New Window, Help, Customize Page, and http. The main content area is titled 'Dispatch Options' and contains a form with the following fields and options:

- Fax Cover Page: [Text input field]
- Server Name: [Text input field with search icon]
- *Output Destination Type: [Dropdown menu showing WEB]
- *Output Destination Format: [Dropdown menu showing PDF]
- Test Dispatch:
- Print BU Comments: (highlighted with a red box)
- Print Duplicate on PO:
- Print Changes Only:
- Print PO Item Description:
- Print Copy:

At the bottom of the form are buttons for OK, Cancel, and Refresh.

A pop-up message regarding waiting for confirmation will be displayed:

- Click **Yes**. Once the PO Dispatch process has completed the **Maintain Purchase Order – Purchase Order** page will display.

The screenshot shows a confirmation pop-up message in the CARDINAL system. The message text is:

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.

At the bottom of the message are buttons for Yes and No.



Create Change Orders for a PO (continued)

On the Maintain **Purchase Order - Purchase Order** page the **PO Status** has been updated to **Dispatched**.

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.

CARDINAL

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

Home | Worklist | Add to Favorites | Sign out

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: **Dispatched** ▲ ✖

PO ID: 0001096992

Copy From: [] Hold From Further Processing

Header

*PO Date: 05/23/2014 Vendor Search

Vendor: BPP ENTERP-001 Vendor Details

*Vendor ID: 0000020803 BPP ENTERPRISES CORP

*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: []

Web IMS?:

Backorder Status: Not Backordered Create BackOrder

Receipt Status: Not Recvd

*Dispatch Method: Print Dispatch

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: NSEV

eVA Dtm: []

Amount Summary

Merchandise: 15,000.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 15,000.00 USD

Add Items From

Purchasing Kit Catalog Item Search

Select Lines To Display

Line: [] To: [] Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	9907701000	SAFETY TRAINING AND AWARENESS SERVICES (HIGHWAY SAFETY, BOAT SAFETY TRAINING AND AWARENESS SERVICES (HIGHWAY SAFETY, BOAT	200.0000	HUR	9907701	75.00000	15,000.00	Approved			

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

Save Return to Search Notify Refresh Add Update/Display



Create Change Orders for a PO - Cancel PO

Cancel PO:

To cancel a PO, click on the red **X** on the **Maintain Purchase Order – Purchase Order** page . This begins the cancellation process, which includes changing the lines to a **Cancel** status and changing the header to a **Pending Cancel** status.

In order to cancel the PO:

- The PO cannot be on hold
- There cannot be any matched PO line schedules
- There cannot be any receipts against the PO
- There cannot be any open vouchers against the PO

When canceling a PO from a Strategic Sourcing event, Cardinal asks you if you would like to move the quantity back into the Sourcing event. If yes, the quantity is put back to the award and you can either re-award the quantity to another bidder or manually close it.

Once cancelled, the Buyer or a batch process will dispatch the PO to complete the cancellation process. This step is required to officially cancel the PO.



Create Change Orders for a PO - Cancel PO (continued)

CARDINAL Home | W

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

New Window ?

Maintain Purchase Order

Purchase Order

Business Unit: 50100
 PO ID: 0001049185
 Copy From:

PO Status: Dispatched  

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

Header

*PO Date: 11/08/2012  Vendor Search
 Vendor: NICKELSTON-001 [Vendor Details](#)
 *Vendor ID: 0000049586 [Nickelston Industries Inc](#)
 *Buyer: MIKE.HALL  Hall, Mike (VDOT)
 PO Reference: ON CALL GUARDRAIL REPAIR INTER

Web IMS?:

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

Backorder Status: Not Backordered [Create BackOrder](#)
 Receipt Status: Not Recvd
 *Dispatch Method: Print
 eVA PO Type: R01  Routine Bill Vendor
 eVA Order Method: URL 
 eVA Interfaced: SEVA 
 eVA Dttm: 11/09/2012 9:00:36AM

Amount Summary

Merchandise: 530,739.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 530,739.00 USD

Add Items From Select Lines To Display



Create Change Orders for a PO - Cancel PO Line

Cancel PO Line:

Canceling the PO Line is available if the PO status is **Dispatched**. If you cancel a dispatched line, a change order is created. Canceling is also available when the PO status is **Approved**, but only if the PO was previously dispatched and subsequently changed and approved.

From the **Maintain Purchase Order – Purchase Order** page, navigate to the **Details for Line** page using the **Line Details** icon. Click the red **X** to cancel the PO Line. The system cancels the PO line.

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

Maintain Purchase Order
Details for Line 1

PO ID: 0001047758 Vendor: OLD DOMINI-029
Line: 1 Item ID: 0206450610 [WOODS - BW1260X - 10' Folding Rotary Mower - Right Hand Cut](#)

Line Details

Category:	0206450	Line Status:	Approved	X
Description:	MOWERS, FLAIL	Backorder Status:	Not Backordered	

Amount Summary

Category ID:	25670	Merchandise Amount:	14,669.00	USD
Amount to Receive:	14,669.000	Doc. Base Amt:	14,669.00	USD
Quantity to Receive:	1.0000			

[Item Availability](#)



Create Change Orders for a PO - Cancel PO Schedule

Cancel PO Schedule:

Canceling the PO Schedule is available if the PO status is **Dispatched**. If you cancel a dispatched schedule, a change order is created. Canceling is also available when the PO status is **Approved**, but only if the PO was previously dispatched and subsequently changed and approved.

From the **Maintain Purchase Order – Purchase Order** page, navigate to the **Schedules** page using the **Schedule** icon. Click on the **Schedule Details** icon to take you to the **Details for Schedule** page. Click the red **X** to cancel the purchase order schedule. The system cancels the PO schedule.

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

New V

Maintain Purchase Order

Details for Schedule 1

Unit:	50100	Vendor:	OLD DOMINI-029
PO ID:	0001047758	Item:	0206450610 WOODS - BW1260X - 10' Folding Rotary Mower - Right Hand Cut
Line:	1	Status:	Active
Schedule:	1		 

Schedule Details

Due Date:	11/27/2012	<input checked="" type="checkbox"/> Custom Price - No Override
Time Due:	<input type="text"/>	<input type="checkbox"/> Zero Price Indicator No Charge



Approve Change Orders

After a change order is created, it should be approved (if necessary) and dispatched to the supplier. The change order dispatch process is the same as with the original PO. Remember to check the **Approval** check box to send the change order for approval.

POs that have change orders attached to them go through a specific approval routing that depends on the difference between the originally approved PO amount, the change order amount, or if a line was added. If a new line is added to a PO, it will require the Buyer's Supervisor approval at a minimum. Any change to a PO that affects the **Quantity, Price, or Ship To** fields may require approval.

The change order appears on the approver's work list and an email is sent to the approver with a link to approve the change order. The approval process for change orders is the same as for POs.

After approval, the change order must be dispatched and any changes made to the PO are in bold print on the printed change order.

For more details on change order approval requirements, see the course titled **501 PR343: Procurement Approvals**.



Change Order Helpful Hints

Change Order Approvals Summary:

- 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.

Helpful Hints:

- The following will automatically cancel an eVA order and create a new eVA order:
 - Change to the Bill To Address
 - Change to a different address location for the same supplier
- 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.



Approve Change Orders (continued)

Change orders are approved on the **Purchase Order Approval** page. You can access this page through your worklist using the hyperlink at the top of every page.

You can also navigate to the **Purchase Order Approval** page using the following path:

Main Menu > Worklist > Worklist

Click the **Purchase Order** hyperlink to access the change order you want to approve.

For detailed information on change order approvals, refer to the course titled **501 PR343: Procurement Approvals**.

Purchase Order Approval

Business Unit: 50100
PO ID: 0000700662
PO Total: 3,399,820.21 USD
Vendor ID: 0000031581 Whitman Requardt & Associates LLP
Buyer: SANDRA.CLARY
PO Reference: CNTRCT: 000000000000031201

PO Status: Pend Appr
PO Date: 08/06/2010
Budget Status: Valid

Justification: Renewal of Professional Service Contract #31201 for Whitman Requardt and Associates for an additional \$2 Million

Review Lines

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	ENGINEERING SERVICES, PROFESSIONAL SERVICES, ENGINEERING SERVICES, PROFESSIONAL	1.0000	HUR	3,399,820.21000	3,399,820.21	USD

Select All / De-select All

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0000700662:Approved

CO for Procurement MNGT Action

Purchase Order 0000700662:Pending

Chng Ord - Orig Val > 50000

Approved Sager, Alcinda "Cindy" (VDOT) Procurement Manager Approval 09/10/12 - 08:44 AM

Approved Williams, Brenda L. (VDOT) Inserted Approver 09/10/12 - 09:45 AM

Approved Sager, Alcinda "Cindy" (VDOT) Sr Procurement Mgr Approval 09/10/12 - 09:46 AM

Pending Brown-Porter, ASD Director Approval

Comments



Approve Change Orders (continued)

CARDINAL

[Favorites](#) | [Main Menu](#) > [Worklist](#) > [Worklist](#)

Purchase Order Approval

Business Unit:	50100	PO Status:	Pend Appr
PO ID:	0000700662	PO Date:	08/06/2010
PO Total:	3,399,820.21 USD	Budget Status:	Valid
Vendor ID:	0000031581 Whitman Requardt & Associates LLP	Justification:	
Buyer:	SANDRA CLARY	Renewal of Professional Service Contract #31201 for Whitman Requardt and Associates for an additional \$2 Million	
PO Reference:	CNTRCT: 000000000000031201		

Review Lines

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	ENGINEERING SERVICES, PROFESSIONAL ENGINEERING SERVICES, PROFESSIONAL	1.0000	HUR	3,399,820.21000	3,399,820.21	USD

[Select All / De-select All](#)

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0000700662:Approved

CO for Procurement MNGT Action

Purchase Order 0000700662:Pending

Chng Ord - Orig Val > 50000

Approved

✓ **Sager, Alcinda "Cindy" (VDOT)**
Procurement Manager Approval
09/10/12 - 08:44 AM

→

Approved

✓ **Williams, Brenda L. (VDOT)**
Inserted Approver
09/10/12 - 09:45 AM

→

Approved

✓ **Sager, Alcinda "Cindy" (VDOT)**
Sr Procurement Mgr Approval
09/10/12 - 09:46 AM

→

Pending

⌚ **Brown-Porter**
ASD Director A



Simulation: Creating Purchase Order Change Orders

You are now about to view a simulation entitled **Creating Purchase Order Change Orders**. Click the Cardinal logo below to start the simulation.





Purchase Order - Modify Accounting Distribution

Accounting entries may be modified for PO lines that have not yet been received or matched, and vouchered in Accounts Payable. Changing accounting distributions does not trigger the change order approval process.

There are instances when a PO has been partially received / vouchered and due to fiscal changes in budgets or project coding, it is necessary to change / edit the chart of accounts distribution for the remaining balance. For instructions on making these changes please see the job aid titled **501 PR344: Update ChartFields on Partially Vouchered PO**.

Modify Accounting Distributions: Single Line

To modify the accounting distribution for a single line navigate to this page using the following path:

Purchasing > Purchase Orders > Add/Update POs

- Select the **Schedule** icon from the **Details** tab which will take you to the **Schedules** page.
- Select the **Distributions/ChartFields** icon on the line you wish to change.
- Enter the new ChartField values.
- Click **OK** to save.



Purchase Order - Modify Accounting Distribution (continued)

Modify Accounting Distributions: Single Line

Maintain Purchase Order
Purchase Order

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	5503649300	THERMOPLASTIC PAVEMENT MARKING MATERIAL PER VADOT HANDICAP, 39 IN., 125 MIL, NON-PREHEATED	20.0000	EA	5503649	66.47000	1,329.40	Approved

Maintain Purchase Order
Schedules

Schedules

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	03/24/2015	NOVA TFO	20.0000	66.47000	1,329.40	Active

Maintain Purchase Order
Distributions for Schedule 1

Unit: 50100 Vendor: FLINT TRADING
 PO ID: 1013920 Item: 5503649300 THERMOPLASTIC PAVEMENT MARKING MATERIAL PER VADOT HANDICAP, 39 IN, 125 MIL, NON-PREHEATED THERMOPLA
 Line: 1 Status: Active
 Schedule: 1

*Distribute By: Quantity Schedule Qty: 20.0000
 Merchandise Amount: 1,329.40 USD
 Doc. Base Amount: 1,329.40 USD

SpeedChart: Multi-SpeedCharts

Distribution

Chartfields | Details/Tax | Asset Information | Req Detail | Statuses

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Cen
1	Open	100.0000	20.0000	1,329.40	USD	50100		5013560	04100	604003	19029	1116320

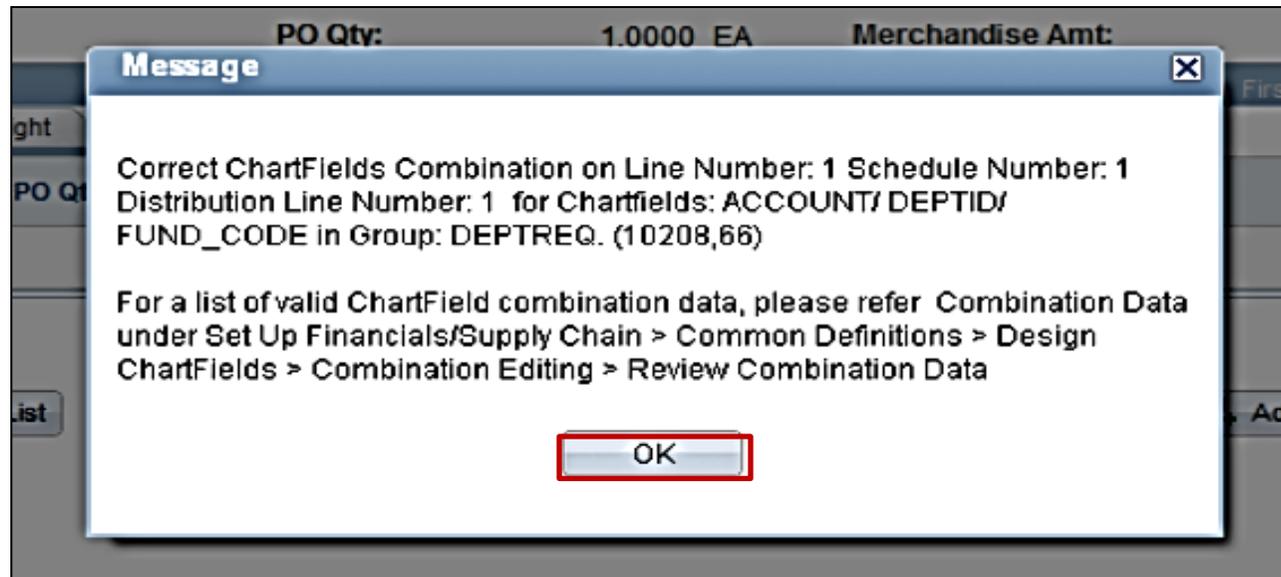
OK Cancel Refresh



Purchase Order - Modify Accounting Distribution (continued)

In the event a pop-up message is displayed, use the information found within the message to resolve the error. In the example below the **Department** is required.

For additional details on combination edits see the General Ledger job aid titled **VDOT GL332 Combination Edits Review Tools**.





Purchase Order - Modify Accounting Distribution (continued)

Modify Accounting Distribution: Multiple Lines

Accounting entries may be modified for PO lines that have not yet been received or matched, and vouchered in Accounts Payable. Changing accounting distributions does not trigger the change order approval process.

You can access the accounting distribution lines from the **Maintain Purchase Order – Purchase Order** page by clicking on the **PO Defaults** hyperlink. New values entered on this page will override default values. Only fields with new values will be updated.

Maintain Purchase Order
Purchase Order Defaults

Business Unit: 50100 PO ID: 0001041505 Vendor: INTERN SLT-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: HALFX RO Halifax Residency Office 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
*Liquidate by: Amount

Distribution

SpeedChart: []

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

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
1		50100					13061		

OK Cancel Refresh



Purchase Order - Modify Accounting Distribution (continued)

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

Maintain Purchase Order

Purchase Order Defaults

Business Unit: 50100 PO ID: 0001041505 Vendor: INTERN SLT-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: HALFX RO Halifax Residency Office Ultimate Use Code:

Due Date: Original Promise Date:

Ship Via: COMMON Freight Terms Code: FOB DEST

Arbitration:

*Distribute By: Quantity Freight Charge Method:

*Liquidate by: Amount [One Time Address](#)

Distribution

SpeedChart:

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

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
1	<input type="text"/>	50100	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	13061	<input type="text"/>	<input type="text"/>

OK Cancel Refresh



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material.

Answer the review questions below:

1. Modifying the accounting distribution does not trigger change order approval.
 - a) True
 - b) False

2. When you need to change a PO that has already been _____, you create a change order.
 - a) Started
 - b) Dispatched
 - c) Approved
 - d) Closed





Lesson 3: Summary

In this lesson, you learned:

- To modify a PO that has already been dispatched, you need to create a change order.
- You can create a change order (modify a purchase order) using the **Add/Update POs** pages.
- To cancel a PO Line, you navigate to the **Details for Line** page for that PO line you want to cancel and click on the **Red X**. This cancels the line only.
- If the chart of accounts distribution is not valid, an error message will be displayed.



Lesson 4: Reconciling / Close the PO

This lesson covers the following topics:

- Reconcile / Close a PO



Reconciling / Close a PO

Once a PO is complete, if the amount / quantity received differs from what was ordered, received and ultimately invoiced for by the supplier, you must decrease or increase the quantities, or amounts, to match the actual amount / quantity received.

To reconcile / close a PO you navigate using the following path: ‘

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

- Select the **Find an Existing Value** tab.
- Enter the **PO ID #** that you wish to close out.
- Click **Search** button. The **Maintain Purchase Order – Purchase Order** page displays.
- The details of the PO you selected are displayed.
- Click on the **Activity Summary** hyperlink. The **Activity Summary** page will display.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Dispatched

PO ID: 0001089685

Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 11/12/2013 Vendor Search

Vendor: PORTCO INC-001 Vendor Details

*Vendor ID: 0000028711 PORTCO Inc

*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: Janitorial Services

Web IIIIS?:

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

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

Receipt Status: Partial

*Dispatch Method: [Print] Dispatch

eVA PO Type: R01 Routine Bill Vendor

*eVA Order Method: PRINT

eVA Interfaced: SEVA

eVA Dttm: 11/13/2013 9:00:51AM

Amount Summary

Merchandise: 3,570.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 3,570.00 USD

Add Items From Catalog Item Search **Select Lines To Display**

Line: [Search] To: [Search] Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	9103901000	JANITORIAL/CUSTODIAL SERVICES JANITORIAL/CUSTODIAL SERVICES	6.0000	MON	9103901	545.00000	3,270.00	Approved			
2	9103955000	SEMI-MONTHLY SERVICES	2.0000	EA	9103955	150.00000	300.00	Approved			

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

Save Return to Search Notify Refresh Add Update/Display



Reconciling / Close a PO (continued)

- The **Activity Summary** header displays the **Merchandise Amount**, **Merchandise Receipt**, **Merchandise Returned**, **Merchandise Invoice** and **Merchandise Matched** values.
- The **Details** tab displays the **Order Qty**. Make note of the quantity ordered.
- Click on the **Receipt** tab.

The screenshot displays the CARDINAL web application interface. At the top, there is a navigation bar with the CARDINAL logo and links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation bar, a breadcrumb trail shows: Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Activity Summary. On the right side of the page, there are utility icons for New Window, Help, Customize Page, and http.

Activity Summary

Business Unit: 50100
Purchase Order: 0001089685
PO Status: Approved
Vendor: PORTCO Inc

Merchandise Amount:	3,570.00 USD
Merchandise Receipt:	2,875.00 USD
Merchandise Returned:	0.00 USD
Merchandise Invoice:	0.00 USD
Merchandise Matched:	0.00 USD

Lines Customize | Find | View All | First | 1-2 of 2 | Last

Line	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1	9103901000	JANITORIAL/CUSTODIAL SERVICES	MON	6.0000	3,270.000	USD	
2	9103955000	SEMI-MONTHLY SERVICES	EA	2.0000	300.000	USD	



Reconciling / Close a PO (continued)

- The **Receipt** tab displays the **Qty Received**. Make note of the quantity received.
- Click on the **Invoice** tab.

Activity Summary

Business Unit: 50100 PO Status: Dispatched
Purchase Order: 0001089685 Vendor: PORTCO Inc

Merchandise Amount: 3,570.00 USD
Merchandise Receipt: 2,875.00 USD
Merchandise Returned: 0.00 USD
Merchandise Invoice: 0.00 USD
Merchandise Matched: 0.00 USD

Lines Customize | Find | View All | First | 1-2 of 2 | Last

Line	Item	Item Description	UOM	Qty Received	Qty Accepted	Open Quantity	Open Amount	Currency	
1	9103901000	JANITORIAL/CUSTODIAL SERVICES	MON	5.0000	5.0000	1.0000	545.0000	USD	
2	9103955000	SEMI-MONTHLY SERVICES	EA	1.0000	1.0000	1.0000	150.0000	USD	

Return to Search Notify



Reconciling / Close a PO (continued)

- The **Invoice** tab displays the **Quantity Invoiced** and **Amt Invoiced** from the supplier.
- For each line compare: the **Order Qty** on the **Details** tab with the **Qty Received** on the **Receipt** tab, along with the **Quantity Invoiced** on the Invoice tab.
- Click on the **Matched** tab.

Activity Summary

Business Unit: 50100 PO Status: Approved
Purchase Order: 0001089685 Vendor: PORTCO Inc

Merchandise Amount: 3,570.00 USD
Merchandise Receipt: 2,875.00 USD
Merchandise Returned: 0.00 USD
Merchandise Invoice: 0.00 USD
Merchandise Matched: 0.00 USD

Line	Item	Item Description	UOM	Quantity Invoiced	Amount Only	Amt Invoiced	Currency	Un-invoiced Quantity	Un-invoiced Amount	Currency
1	9103901000	JANITORIAL/CUSTODIAL SERVICES	MON	0.00		0.00	USD	6.0000	3,270.000	USD
2	9103955000	SEMI-MONTHLY SERVICES	EA	0.00		0.00	USD	2.0000	300.000	USD



Reconciling / Close a PO (continued)

- The **Matched** tab displays the **Qty Matched** and **Amt Matched** as vouchered / paid from the Accounts Payable module. Matching is an automated process that is handled within the Accounts Payable module. The matching process is used to compare vouchers. i.e., supplier invoices, with purchase orders, and receiving documents. In this example matching has not yet occurred therefore the values remain at zero.
- Close or minimize the page and go back to the **Maintain Purchase Order – Purchase Order** page.

Activity Summary

Business Unit: 50100 PO Status: Approved
Purchase Order: 0001089685 Vendor: PORTCO Inc

Merchandise Amount: 3,570.00 USD
Merchandise Receipt: 2,875.00 USD
Merchandise Returned: 0.00 USD
Merchandise Invoice: 0.00 USD
Merchandise Matched: 0.00 USD

Lines Customize | Find | View All | First 1-2 of 2 Last

Details | Receipt | Invoice | **Matched** | RTV

Line	Item	Item Description	UOM	Qty Matched	Amt Matched	Currency
1	9103901000	JANITORIAL/CUSTODIAL SERVICES	MON	0.0000	0.0000	USD
2	9103955000	SEMI-MONTHLY SERVICES	EA	0.0000	0.0000	USD



Reconciling / Close a PO (continued)

- For each line enter the **Qty Received** from the **Receipt** tab on the **Activity Summary** in the **PO Qty** field.
- Click on the **Schedule** icon.

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

New Window | Help | Customize Page | http

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Dispatched

PO ID: 0001089685

Copy From:

Hold From Further Processing

Header

*PO Date: 11/12/2013 Vendor Search

Vendor: PORTCO INC-001 Vendor Details

*Vendor ID: 0000028711 PORTCO Inc

*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: Janitorial Services

Web IMS?:

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

Receipt Status: Received

*Dispatch Method: Print

eVA PO Type: R01 Routine Bill Vendor

*eVA Order Method: PRNT

eVA Interfaced: SEVA

eVA Dttm: 11/13/2013 9:00:51AM

Amount Summary

Merchandise: 3,570.00

Freight/Tax/Misc.: 0.00

Total Amount: 3,570.00 USD

Add Items From

Select Lines To Display

Line: To:

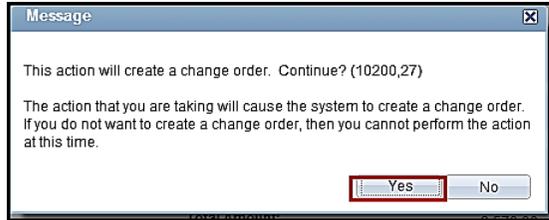
Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status			
1	9103901000	JANITORIAL/CUSTODIAL SERVICES JANITORIAL/CUSTODIAL SERVICES	<input type="text" value="5"/>	MON	9103901	545.00000	3,270.00	Approved			
2	9103955000	SEMI-MONTHLY SERVICES	<input type="text" value="1"/>	EA	9103955	150.00000	300.00	Approved			

View Approvals *Go to:



Reconciling / Close a PO (continued)



- A change order confirmation message is displayed. This message is displayed when the purchase order is being changed but the blue triangle was not used to create the change order.
- Click **Yes**. The **Maintain Purchase Order – Schedules** page will display.

- The **Schedules** are displayed.
- Verify that the **PO Qty** field on each schedule matches your changes you just made on the on the **Purchase Order** page to the **PO Qty** field.
- Click the **Distribution** icon on the first line. The **Maintain Purchase Order - Distributions for Schedule X** page is displayed.
 - You will need to click the **Distribution** icon for each line.

Maintain Purchase Order

Schedules

Unit: 50100 Vendor: PORTCO INC-001 PO Status: Dispatched
PO ID: 0001089685 PO Date: 11/12/2013

Return to Main Page

Line	Item	Description	PO Qty	Unit	Merchandise Amt
1	9103901000	JANITORIAL/CUSTODIAL SERVICES	5.0000	MON	2,725.00 USD
2	9103955000	SEMI-MONTHLY SERVICES	1.0000	EA	150.00 USD



Reconciling / Close a PO (continued)

- Verify that the **PO Qty** field on each distribution line matches your changes you just made to the **PO Qty** field on the on the **Schedules** page and the **Purchase Order** page.
- Click **OK**. The **Maintain Purchase Order – Schedules** page will display.

Maintain Purchase Order

Distributions for Schedule 1

Unit: 50100 Vendor: PORTCO INC-001
PO ID: 0001089685 Item: 9103901000 JANITORIAL/CUSTODIAL SERVICES JANITORIAL/CUSTODIAL SERVICES
Line: 1
Schedule: 1 Status: Active

*Distribute By: Quantity Schedule Qty: 5.0000
Merchandise Amount: 2,725.00 USD
SpeedChart: Multi-SpeedCharts Doc. Base Amount: 2,725.00 USD

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Cen
1	Open	100.0000	5.0000	2,725.00	USD	50100		5012510	04100	604002	15031	1115310

OK Cancel Refresh



Reconciling / Close a PO (continued)

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

PO ID: 0001089685 PO Date: 11/12/2013 Change Order: 1

[Return to Main Page](#)

Lines Find | View 1 | First 1-2 of 2 | Last

Line: 1 Item: 9103901000 JANITORIAL/CUSTODIAL SERVICES PO Qty: 5.0000 MON Merchandise Amt: 2,725.00 USD
JANITORIAL/CUSTODIAL SERVICES

Schedules Customize | Find | View All | First 1 of 1 | Last

Details | **Statuses** | Shipment | Matching | Receiving | Freight | RTV | [...]

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status					
1	11/12/2013	HPTRD ADMS	5.0000	545.00000	2,725.00	Active					

Line: 2 Item: 9103955000 SEMI-MONTHLY SERVICES PO Qty: 1.0000 EA Merchandise Amt: 150.00 USD

Schedules Customize | Find | View All | First 1 of 1 | Last

Details | **Statuses** | Shipment | Matching | Receiving | Freight | RTV | [...]

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status					
1	11/12/2013	HPTRD ADMS	1.0000	150.00000	150.00	Active					

Add ShipTo Comments



Reconciling / Close a PO (continued)

- Confirm that the **PO Qty** field for each line on the **Details** tab of the **Purchase Order** page still matches the changes you made to the **PO Qty** field on the **Schedules** page and the **Distributions for Schedule X** page.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Dispatched
PO ID: 0001089685
Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 11/12/2013 Vendor Search
Vendor: PORTCO INC-001 Vendor Details
*Vendor ID: 0000028711 PORTCO Inc
*Buyer: MIKE.HALL Hall, Mike (VDOT)
PO Reference: Janitorial Services
Web IMS?:

Backorder Status: Not Backordered Create BackOrder
Receipt Status: Partial
*Dispatch Method: [Print] Dispatch
eVA PO Type: R01 Routine Bill Vendor
*eVA Order Method: PRNT
eVA Interfaced: SEVA
eVA Dttm: 11/13/2013 9:00:51AM

Amount Summary

Merchandise: 2,875.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 2,875.00 USD

Add Items From Catalog Item Search

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

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	9103901000	JANITORIAL/CUSTODIAL SERVICES JANITORIAL/CUSTODIAL SERVICES	5.0000	MON	9103901	545.00000	2,725.00	Approved			
2	9103955000	SEMI-MONTHLY SERVICES	1.0000	EA	9103955	150.00000	150.00	Approved			

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

Save Return to Search Notify Refresh Add Update/Display



Reconciling / Close a PO (continued)

Once your updates to the PO have been made you must ensure that the sum of accounting distribution matches your changes to the schedules. From the **Maintain Purchase Order – Purchase Order** page:

- Click on the **Details** tab.
- Click on the **Schedule** icon for the line you wish to review. The **Schedules** page for the line will display. You will need to review each line's accounting distribution.
- From the **Details** tab click on the **Distribution** icon. The **Distributions for Schedule X** page will display.

Purchase Order

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

Copy From: [Dropdown]
Hold From Further Processing:

Header

*PO Date: 05/22/2014
Vendor: LL CARTER -003
*Vendor ID: 0000033093
*Buyer: CAROLINE HUDGIN
PO Reference: Stone

Receipt Status: Not Recvd
*Dispatch Method: R01
eVA PO Type: PRINT
*eVA Order Method: NSEV
eVA Dttm: [Dropdown]

Amount Summary

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

Lines

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

Maintain Purchase Order - Schedules

Unit: 50100
PO ID: NEXT
Vendor: LL CARTER -003
PO Date: 05/23/2014
PO Status: Open

Lines

Line	Item	Description	PO Qty	Price	Merchandise Amount	Status
1	7503518200	AGGREGATE BASE, STONE CLASS L DRY RIP RAP	100.0000 LTN	40.96000	4,096.00	Active



Reconciling / Close a PO (continued)

The **Distributions for Schedule X** page will display:

- Verify or update the sum of the accounting distribution(s) to match the **Line Schedule**.
- Click **OK**. The **Schedules** page will display.

Maintain Purchase Order
Distributions for Schedule 1

Unit: 50100 Vendor: LL CARTER-003
PO ID: NEXT PO Date: 05/22/2014
Line: 1 Item: 7503518200 AGGREGATE BASE STONE CLASS I DRY RIP RAP
Schedule: 1 Status: Active

*Distribute By: Quantity Schedule Qty: 100.0000
Merchandise Amount: 4,096.00 USD
Doc. Base Amount: 4,096.00 USD

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	GL Unit	Entry Event	*Account	Fund	Program	Department	Cost Cen
1	Open	100.0000	100.0000	4,096.00	USD	50100		5012550	04100	699001	10003	111200

- Click on the **Return to Main Page** hyperlink. The **Purchase Order** page will display.
- Click **Save**. The **Change Reason** page will display.

Maintain Purchase Order
Schedules

Unit: 50100 Vendor: LL CARTER-003 PO Status: Open
PO ID: NEXT PO Date: 05/22/2014

[Return to Main Page](#)

Line	Item	Description	PO Qty	Merchandise Amt
1	7503518200	AGGREGATE BASE STONE CLASS I DRY RIP RAP	100.0000	4,096.00 USD

Maintain Purchase Order
Purchase Order

Business Unit: 50100 PO Status: Approved
PO ID: 0000523347
Change Order: 1

Vendor: BRANDYWINE-003 Vendor Details
*Vendor ID: 0000058195 BRANDYWINE PROPERTIES MANAGEMENT

*Buyer: MIKE HALL LP Hail, Mike (VDOT)
PO Reference: ReqId 0001603415

Amount Summary
Merchandise: 7,899,105.00
Freight/Tax/Misc: 0.00
Total Amount: 7,899,105.00 USD



Reconciling / Close a PO (continued)

- Enter / update the **Reason Code** and **Comment**.
- Click **OK**.
- The **Maintain Purchase Order – Purchase Order** page will display.

Change Reason
Enter a reason code and comment for making changes that are being tracked.

Unit: 50100 PO ID: 0001089685

Reason Code: OTHER

Comment: Reduced quantities to match Received amounts. MJH 5/23/15

Use Same Reason Code

OK Cancel Refresh

- The reconciliation changes have been saved.
- The **Change Order** field value is updated to 1.
- Click on the **PO Submit for Approval** checkbox (the green checkmark) which is next to the **PO Status** field.

Maintain Purchase Order

Business Unit: 50100 PO Status: Open

PO ID: 0001089685

Change Order: 1

Copy From: [Dropdown]

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

Header

*PO Date: 11/12/2013 Vendor Search

Vendor: PORTCO INC-001 [Vendor Details](#)

*Vendor ID: 0000028711 PORTCO INC

*Buyer: MIKE HALL Hall, Mike (VDOT)

PO Reference: Janitorial Services

Web IMS?:

Header Details: [Activity Summary](#)
[Document Status](#)
[Requisitions](#)
[PO Activities](#)

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

Receipt Status: Received

*Dispatch Method: Print [Dispatch](#)

eVA PO Type: R01 Routine Bill Vendor

eVA Order Method: PRNT

eVA Interfaced: RSEV

eVA Dttm: 11/13/2013 9:00:51AM

Amount Summary

Merchandise: 2,875.00

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

Total Amount: 2,875.00 USD

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

Select Lines To Display

Line: [Dropdown] To: [Dropdown] [Retrieve](#)

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	9103901000	JANITORIAL/CUSTODIAL SERVICES JANITORIAL/CUSTODIAL SERVICES	5.0000	MON	9103901	545.00000	2,725.00	Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	9103955000	SEMI-MONTHLY SERVICES	1.0000	EA	9103955	150.00000	150.00	Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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



Reconciling / Close a PO (continued)

- The **PO Status** updates to **Approved** and is ready for dispatch.
- Once dispatched, either manually or by batch process, the PO will be reconciled / closed out.

Maintain Purchase Order

Purchase Order

Business Unit: 50100 PO Status: Approved ▲ ✖
PO ID: 0001089685
Change Order: 1
Copy From:
 Hold From Further Processing [Current Change Reason](#)

Header

*PO Date: 11/12/2013 Vendor Search
Vendor: PORTCO INC-001 [Vendor Details](#)
*Vendor ID: 0000028711 PORTCO Inc
*Buyer: MIKE.HALL Hall, Mike (VDOT)
PO Reference: Janitorial Services
Web IMS?:

Backorder Status: Not Backordered [Create BackOrder](#)
Receipt Status: Received
*Dispatch Method: [Dispatch](#)
eVA PO Type: R01 Routine Bill Vendor
*eVA Order Method: PRNT
eVA Interfaced: RSEV
eVA Dttm: 11/13/2013 9:00:51AM

Amount Summary

Merchandise: 2,875.00
Freight/Tax/Misc.: 0.00 [Calculate](#)
Total Amount: 2,875.00 USD

Add Items From [Catalog](#) [Item Search](#) **Select Lines To Display**
Line: To: [Retrieve](#)

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status				
1	9103901000	JANITORIAL/CUSTODIAL SERVICES JANITORIAL/CUSTODIAL SERVICES	5.0000	MON	9103901	545.00000	2,725.00	Approved				
2	9103955000	SEMI-MONTHLY SERVICES	1.0000	EA	9103955	150.00000	150.00	Approved				

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

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



Lesson 4: Summary

In this lesson, you learned:

- How to reconcile / close a PO by matching the quantity ordered, quantity received, and quantity matched / vouchered for a PO.



Lesson 5: Review PO Information, History, and Activities

This lesson covers the following topics:

- Review PO Information, History, and Activities
- **Purchase Order Inquiry** page



Review PO Information, History, and Activities

After creating a PO, you can view all future transactions and related activities. You can view the header, line, schedule, and distribution details. This can be done through the following pages:

- **Purchase Order Inquiry** page
- **Activity Summary** page
- **Review Change History** and **Review Change Orders** pages



Purchase Order Inquiry Page

The **Purchase Order Inquiry** page lets you view details of the PO. This page is a display-only version of the **Maintain Purchase Order – Purchase Order** page. From this page, you can display other pages, such as **Activity Summary** and **Change Order**, where you can view additional details of the PO.

You can navigate to this page using the following path:

Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Enter your search criteria and click **Search**.

Purchase Order Inquiry
Purchase Order

Business Unit: 50100 PO Status: Dispatched
PO ID: 0001034405
Change Order: 1

Header
PO Date: 08/03/2012
Vendor Name: INTERSTATE ROA
Vendor ID: 0000022978 [Vendor Details](#)
Buyer: Hall, Mike (VDOT)
PO Reference: PAVEMENT SKID RESISTENCE

Backorder Status: Not Backordered
Receipt Status: Not Recvd
 Hold From Further Processing

Amount Summary
Merchandise: 826,490.00
Freight/Tax/Misc: 0.00
Total: 826,490.00 USD

[Change Order](#) [Activity Summary](#)

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	826,490.00 USD	Approved
2	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	41,324.50 USD	Approved
3	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	-41,324.50 USD	Approved

View Approvals
[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Related Links](#)



Purchase Order Inquiry Page (continued)

CARDINAL Home | Worklist

Favorites Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

New Window Help

Purchase Order Inquiry

Purchase Order

Business Unit: 50100 PO Status: Dispatched
 PO ID: 0001034405
 Change Order: 1

Header

PO Date: 08/03/2012
 Vendor Name: INTERSTATE ROA
 Vendor ID: 0000022978 [Vendor Details](#)
 Buyer: Hall, Mike (VDOT)
 PO Reference: PAVEMENT SKID RESISTENCE

Backorder Status: Not Backordered
 Receipt Status: Not Recvd
 Hold From Further Processing

Amount Summary

Merchandise: 826,490.00
 Freight/Tax/Misc.: 0.00
 Total: 826,490.00 USD

[Header Details](#) [All RTV](#) [Document Status](#)
[Header Comments...](#) [Matching](#)
[Change Order](#) [Activity Summary](#)

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	826,490.00 USD	Approved
2	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	41,324.50 USD	Approved
3	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	-41,324.50 USD	Approved

View Approvals

Return to Search Previous in List Next in List Notify Related Links



Purchase Order Inquiry Page - Supplier Details

Click the **Supplier Details** link on the **Purchase Order Inquiry** page to display the **Supplier Details** page. This page displays more details about the supplier for the PO.

You can click the **Return** button on the page to return to the **Purchase Order Inquiry** page when you are done.

CARDINAL
Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Purchase Order Inquiry
Vendor Details -- LL Carter & Son Inc

Business Unit:	50100	PO ID:	0001041547	Terms:	30	Net 30
Location:	MAIN			Basis Date Type:	Prompt Payment	
Address:	4	Show Address Details		Basis Date:		
Contact:		Show Contact Details				
Salesperson:		Show Salesperson Details				

Address Details

Country:	USA	United States	Fax:	804/448-0524	
Address 1:	17460 Countyline Church Road			Prefix:	1
Address 2:					
Address 3:	VA10051504		Phone:	804/448-3994	
City:	Ruther Glen				
County:	077946325	Postal:	22546		
State:	VA	Virginia			

[Return](#)



Purchase Order Inquiry Page - Supplier Details (continued)

CARDINAL

Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Purchase Order Inquiry
Vendor Details -- LL Carter & Son Inc

Business Unit: 50100 PO ID: 0001041547

Location: MAIN Terms: 30 Net 30

Address: 4 [Show Address Details](#) Basis Date Type: Prompt Payment

Contact: [Show Contact Details](#) Basis Date:

Salesperson: [Show Salesperson Details](#)

Address Details

Country: USA United States Fax: 804/448-0524

Address 1: 17460 Countyline Church Road Prefix: 1

Address 2:

Address 3: VA10051504 Phone: 804/448-3994

City: Ruther Glen

County: 077946325 Postal: 22546

State: VA Virginia

[Return](#)



Purchase Order Inquiry Page - Header Details

Click the **Header Details** link on the **Purchase Order Inquiry** page to display the **Purchase Order Header Details** page. This page displays the PO defaults and the rules for the PO.

You can click the **Return** button on the page to return to the **Purchase Order Inquiry** page when you are done.

CARDINAL
Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Purchase Order Inquiry
PO Header Details

Business Unit: 50100 PO ID: 0001041547

PO Details

Vendor: LL Carter & Son Inc Budget Status: Not Chkd
PO Date: 10/31/2012 Origin: ONL Online
PO Type: General Tax Exempt ID: 546001730
Billing Location: CNTRL OFF3 [Billing Address](#) Letter of Credit ID:

Currency

Currency Code: USD [Exchange Rate Detail](#) Exchange Rate: 1.00000000
Rate Date: 01/01/1901 Base Currency: USD
Rate Type: CRRNT

Process Control Option

Hold From Further Processing Method: Print STANDARD
 Dispatch Accounting Date: 10/31/2012



Purchase Order Inquiry Page - Header Details (continued)

CARDINAL

Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Purchase Order Inquiry
PO Header Details

Business Unit: 50100 PO ID: 0001041547

PO Details

Vendor:	LL Carter & Son Inc	Budget Status:	Not Chk'd
PO Date:	10/31/2012	Origin:	ONL Online
PO Type:	General	<input checked="" type="checkbox"/> Tax Exempt	ID: 546001730
Billing Location:	CNTRL OFF3 Billing Address	Letter of Credit ID:	

Currency

Currency Code:	USD Exchange Rate Detail	Exchange Rate:	1.00000000
Rate Date:	01/01/1901	Base Currency:	USD
Rate Type:	CRRNT		

Process Control Option

<input type="checkbox"/> Hold From Further Processing	Method:	Print	STANDARD
<input checked="" type="checkbox"/> Dispatch	Accounting Date:	10/31/2012	

[Return](#)



Purchase Order Inquiry Page - Bill To Address

Click the **Billing Address** link on the **Header Details** page to display details for the billing location. You can click the **OK** button to return to the **Purchase Order Inquiry** page when you are done.

Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

PO Header Details - Bill To Address

Location: CNTRL OFF3

Billing Address

Address 1: VDOT Central Office
Address 2: 1221 E. Broad St.
Address 3:
Address 4:

City: Richmond
State: VA Postal: 23219
Country: USA

OK Cancel



Purchase Order Inquiry Page - Header Comments

If the **Header Comments** link on the **Purchase Order Inquiry** page is active, you can click it to display comments associated with the PO header. If this link is not active, there are no comments.

Click the **OK** button to return to the **Purchase Order Inquiry** page.

PO Header Comments

Business Unit: 50100 PO ID: 0001041296 Vendor: BRANSCOME INC

Retrieve Active Comments Only

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending

Comments Find | View All First 1 of 1 Last

Comment Status: Active

This is a CONFIRMING purchase order for Contract number UM512PMC100017 DO NOT DUPLICATE

Send to Vendor Shown at Receipt
 Shown at Voucher Approval Justification

Associated Document

Attachment: Email

From -> PO 50100-0001041296



Purchase Order Inquiry Page - Change Order

Click the **Change Order** link on the **Purchase Order Inquiry** page to display the **Review Change Order** page. This page displays change order history for the PO, if any.

The **Change Order** page opens up as a separate internet tab. To return to the **Purchase Order Inquiry** page click on the **Purchase Orders** internet tab. You may also close the **Change Order** internet tab and return to the **Purchase Order Inquiry** page.



Favorites | Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change Orders

Header Changes | Line Changes | Ship Changes

Unit: 50100 PO ID: 0001034405

Batch	Seq	Description	Value	User Modify	Last Change Da
0	0	Address Sequence Number	4.00000	AA_CARDINAL_BATCH_PR	08/06/2012 5:34:14PM
0	0	Billing Location	CNTRL OFF3	AA_CARDINAL_BATCH_PR	08/06/2012 5:34:14PM
0	0	Contact		AA_CARDINAL_BATCH_PR	08/06/2012 5:34:14PM
0	0	Currency Code	USD	AA_CARDINAL_BATCH_PR	08/06/2012 5:34:14PM
0	0	Purchase Order Reference	PAVEMENT SKID RESISTENCE	AA_CARDINAL_BATCH_PR	08/06/2012 5:34:14PM
0	0	PO Status	D	AA_CARDINAL_BATCH_PR	08/06/2012 5:34:14PM

Return to Search | Notify



Purchase Order Inquiry Page - Document Status

Click the **Document Status** link on the **Purchase Order Inquiry** page to access and review information about procurement documents associated with the PO. These documents may include contracts, vouchers, receipts, and payments and links to each of the associated documents will be available.

The **Document Status** page opens up as a separate internet tab. To return to the **Purchase Order Inquiry** page click on the **Purchase Orders** internet tab. You may also close the **Document Status** internet tab and return to the **Purchase Order Inquiry** page.



Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Document Status

Document Status

Business Unit: 50100 PO ID: 1042040
Document Date: 10/09/2012 Status: Dispatched
Currency: USD Document Type: Purchase Order
Buyer: Settle, Norma J. (VDOT) Merchandise Amt: 14,097.92

Associated Document Customize | Find | View All | First 1-4 of 4 Last

SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location
STATE		Contract	000000000000000000040699	Approved	12/20/2012	0000024937	
	50100	Receipt	0001568239	Closed	10/09/2012	0000024937	MAIN
	50100	Voucher	00114129	Posted	09/29/2012	0000024937	MAIN
STATE		Payment	20033083	Posted	11/02/2012	0000024937	MAIN

Return to Search | Previous in List | Next in List



Purchase Order Inquiry Page - Lines

There are numerous details associated with the PO line that you can display from the **Lines** section on the **Purchase Order Inquiry** page.

Purchase Order Inquiry

Purchase Order

Business Unit: 50100 PO Status: Dispatched
 PO ID: 0001034405
 Change Order: 1

Header

PO Date: 08/03/2012
 Vendor Name: INTERSTATE ROA
 Vendor ID: 0000022978 [Vendor Details](#)
 Buyer: Hall, Mike (VDOT)
 PO Reference: PAVEMENT SKID RESISTENCE

Backorder Status: Not Backordered
 Receipt Status: Not Recvd
 Hold From Further Processing

Amount Summary

Merchandise: 826,490.00
 Freight/Tax/Misc.: 0.00
 Total: 826,490.00 USD

[Header Details](#) [All RTV](#) [Document Status](#)
[Header Comments...](#) [Matching](#)
[Change Order](#) [Activity Summary](#)

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status		
1	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	826,490.00 USD	Approved		
2	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	41,324.50 USD	Approved		
3	9137101000	PAVEMENT SKID RESISTENCE	9137101	1.0000	HUR	-41,324.50 USD	Approved		

[View Approvals](#)

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Related Links](#)



Purchase Order Inquiry Page - Line Details

When you click on a **Line Details** icon in the **Lines** section of the **Purchase Order Inquiry** page, the **Details for Line** page will be displayed. This page displays additional details associated with the selected PO line. Click the **Return** button to return to the **Purchase Order Inquiry** page.

CARDINAL
Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Details for Line INTERSTATE ROA

PO ID: 0001034405 Line: 1 [PAVEMENT SKID RESISTENCE](#)
Status: Approved Amount Only Backorder Status: Not Backordered

Line Details

Physical Nature:	Services		
Merchandise Amt:	826,490.00	Currency:	USD
Category:	9137101 MAINTENANCE AND REPAIR, HIGHWAY AND ROAD	Category ID:	07643
Contract SetID:	STATE		
Contract:	S00098916N01 Contract Details	Version:	2
Contract Line:		Category Line:	
Group ID:			
Release:	1		
RFQ ID:		RFQ Line:	
Vendor Item ID:			
Vendor's Catalog:		UPN ID:	
GPO Contract:		GPO ID:	
Manufacturer ID:			
Mfg Item ID:			
Price Qty:	Schedule	Price Date:	PO
<input type="checkbox"/> Withholding		<input type="checkbox"/> Device Tracking	
Receiving Required:	Do Not	Replenish Code:	Standard
<input type="checkbox"/> Inspect		Inspect ID:	
Configuration Code:			

Return



Purchase Order Inquiry Page - Item Description

The **Item Description** for a **Line** on the **Purchase Order Inquiry** page includes only the first 30 characters of the item's full description. By clicking on the **Item Description** link for the desired line the **Item Description** page will be displayed with the full **Transaction Item Description** text.

Click the **Return** button to return to the **Purchase Order Inquiry** page.

CARDINAL

Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Inform

Item Description

Item ID: 9137101000

Transaction Item Description

PAVEMENT SKID RESISTENCE

Preferred Language Item Descr

MAINTENANCE AND REPAIR, HIGHWAY AND ROAD MAINTENANCE AND REPAIR, HIGHWAY AND ROAD

Return



Purchase Order Inquiry Page - Line Comments

From the **Purchase Order Inquiry** page, click the **Line Comments** icon on the desired line to view comments that were entered for the item. The **PO Line Comments** page will be displayed. From the **PO Line Comments** page, click **OK** to return to the **Purchase Order Inquiry** page.

The screenshot shows the 'PO Line Comments' page in the CARDINAL system. The page header includes the CARDINAL logo and a breadcrumb trail: Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. The main content area is titled 'PO Line Comments' (highlighted with a red box) and displays the following information:

- Business Unit: 50100
- PO ID: 0001034405
- Vendor: INTERSTATE ROA
- Change Order: 1

Below this information, there are several controls:

- A checked checkbox for 'Retrieve Active Comments Only' and a 'Retrieve' button.
- '*Sort Method:' set to 'Comment Time Stamp' with a dropdown arrow.
- '*Sort Sequence:' set to 'Ascending' with a dropdown arrow and a 'Sort' button.
- A 'Comments' section with a search bar, 'Find | View All First 1 of 1 Last' navigation, and a 'Comment Status: Active' label. Below this is a large empty text area.
- Checkboxes for 'Send to Vendor', 'Shown at Receipt', and 'Shown at Voucher'.
- An 'Associated Document' section with an 'Attachment:' label, 'Attach', 'View', and 'Email' buttons.
- Text at the bottom: 'From -> PO 50100-0001034405-1'.

At the bottom of the page, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.



Purchase Order Inquiry Page - Schedule

There are many details associated with the schedule(s) for each PO line. To display the PO schedule(s) for a line, from the **Purchase Order Inquiry** page click the **Schedule Details** icon on the line you wish to view. The **Schedules** page displays for the PO line. Each schedule has links (icons) to more detailed information including schedule details, miscellaneous charges, and accounting distributions. The **Price Adjustment**, **Miscellaneous Charges**, and **Sched Sales/Use** tax icons are generally not used.

Purchase Order Inquiry
Schedules

Business Unit: 50100 PO ID: 0001034405 Change Order: 1

Return to Main Page

Lines

Line: 1 PAVEMENT SKID RESISTENCE PO Qty: 1.0000 HUR Merchandise Amt: 826,490.00 USD

Schedules

Sched	Due Date	Time Due	Revision	Ship To	Attention To	PO Qty	Price	Merchandise Amount	Status
1	08/03/2012			CNTRL OF 1		1.0000	826,490.00000	826,490.00 USD	Active

Ship To Comments

Return to Search Previous in List Next in List Notify



Purchase Order Inquiry Page - Schedule Details

From the **Purchase Order Inquiry – Schedules** page, click the **Schedule Details** icon for the desired schedule to view details about the schedule, including the **Freight Terms**.

To return to the **Purchase Order Inquiry** page, click **Return** and then from the **Schedules** page click the **Return to Main Page** link.

Purchase Order Inquiry
Details for Schedule 1

PO ID: 0001034405 Status: Active
Line Number: 1 Schedule: 1
Item ID: 9137101000 Backordered From Schedule:
PAVEMENT SKID RESISTANCE

Schedule Details

Due Date: 08/03/2012 Custom Price - No Override
Original Promise Date: 08/03/2012 No Charge
Ship Date: Frozen (Planning)
Ship Via: COMMON Common Carrier

Freight Terms: FOB DEST FOB Dest, Freight Prepaid

Matching: Full Match
Match Status PO: Matched

Amount Summary

PO Qty: 1.0000
Merchandise Amount: 826,490.00 USD
Doc. Base: 826,490.00 USD

Receiving Controls

Reject Qty Over Tolerance
Early Ship Reject Days: 2
Qty Rcvd Tolerance %:
Close Under Qty %:

Matching Controls

	Tolerance Over	Tolerance Under
Unit Price Tolerance:		
% Unit Price Tolerance:	50.00	999.99
Ext Price Tolerance:		
% Ext Price Tolerance:	50.00	999.99

Freight Calculation Rule

Arbitration Plan ID:
Freight Charge Method: Freight Charge Override

Return



Purchase Order Inquiry Page - Distributions

Accounting distributions are associated with schedules. Clicking the **Distributions/ChartFields** icon on the **Schedules** page displays the associated distributions.

The **ChartFields** tab displays the chart of accounts information related to the schedule. Typically you will need to scroll right to see all the fields.

The **Details/Tax** and **Asset Information** tabs are not used.

The screenshot shows the CARDINAL web application interface. At the top, there is a navigation breadcrumb: Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. Below this, the page title is "Purchase Order Inquiry" and the sub-title is "Distributions for Schedule 1". The main content area displays the following information:

PO ID: 0001034405 Line: 1 Sched: 1 Item: 9137101000 PAVEMENT SKID RESISTENCE
Status: Active Sched Qty: 1.0000
Distribute By: Amount Merchandise Amount: 826,490.00 USD
Doc. Base Amount: 826,490.00 USD

Below the information, there are several tabs: "Distributions" (highlighted with a red box), "Chartfields", "Details/Tax", "Asset Information", and "Req Detail". The "Distributions" tab is active and displays a table with the following data:

Dist	Status	Percent	Merchandise Amt	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS
1	Open	100.0000	826,490.00	USD	50100	5012550	04720	603002	16000			

At the bottom left of the page, there is a "Return" button.



Purchase Order Inquiry Page - Distributions: Req/Detail Tab

On the **Distributions** page, the **Req/Detail** tab displays information about associated requisitions. If there is a requisition, the **Req ID** is displayed here as a hyperlink. You can click it to get more information about the requisition.

Purchase Order Inquiry
Distributions for Schedule 1

PO ID: 0001040627 Line: 1 Sched: 1 Item: 9136755000 Electrical Schematic Check of the George P. Coleman Bridge

Status: Active Sched Qty: 1.0000

Distribute By: Quantity Merchandise Amount: 48,294.00 USD

Doc. Base Amount: 48,294.00 USD

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

Dist	Status	Percent	Req BU	Req ID	Req Line	Req Sched	Req Dist	Requester	Requisition Name	Attention To	Phone	Fax
1	Open	100.0000	50100	0002018161	1	1	1	MARIA.YORK	0002018161		757/727-4824	757/727-4851

Return



Activity Summary Page

On the **Activity Summary** page, you can view what has been received. The page will include information as well as links to more information for the associated receipt(s) and voucher(s).

The **Merchandise Amount**, **Merchandise Receipt**, **Merchandise Returned**, **Merchandise Invoice**, and **Merchandise Matched** values will be displayed on the **Activity Summary** page.

You can navigate to this page using the following path:

Main Menu > Purchasing > Purchase Orders > Review PO Information > Activity Summary

Or, from the **Purchase Order Inquiry** page, you can click on the **Activity Summary** link.

Activity Summary

Business Unit:	50100	PO Status:	Dispatched
Purchase Order:	1042040	Vendor:	<u>Pittmans Tree & Landscaping Inc</u>
Merchandise Amount:	14,097.92 USD		
Merchandise Receipt:	3,524.48 USD		
Merchandise Returned:	0.00 USD		
Merchandise Invoice:	3,524.48 USD		
Merchandise Matched:	3,524.48 USD		

Lines Customize | Find | View All | First 1-2 of 2 Last

Details Receipt Invoice Matched RTV

Line	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1	9888878700	TREE TRIMMING AND BRUSH REMOVA	HUR	64.0000	12,570.240	USD	<input type="checkbox"/>
2	9758677050	TRUCKS. HIRED EQUIPMENT. PER V	HUR	64.0000	1,527.680	USD	<input type="checkbox"/>



Activity Summary Page (continued)

Activity Summary

Business Unit: 50100 **PO Status:** Dispatched
Purchase Order: 1042040 **Vendor:** Pittmans Tree & Landscaping Inc

Merchandise Amount:	14,097.92	USD
Merchandise Receipt:	3,524.48	USD
Merchandise Returned:	0.00	USD
Merchandise Invoice:	3,524.48	USD
Merchandise Matched:	3,524.48	USD

Lines								Customize	Find	View All	First	1-2 of 2	Last
Line	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only						
1	9888878700	TREE TRIMMING AND BRUSH REMOVA	HUR	64.0000	12,570.240	USD	<input type="checkbox"/>						
2	9758677050	TRUCKS, HIRED EQUIPMENT, PER V	HUR	64.0000	1,527.680	USD	<input type="checkbox"/>						



Activity Summary Page - Receipt Tab

The **Receipt** tab is used to view additional information about receipt documents associated with the PO, such as quantity received and accepted. Click a **Receipt** icon to open the page that provides a list of all receipts and links that take you to a **Receipts** page where you can view detailed receipt information.

Activity Summary

Business Unit: 50100 PO Status: Dispatched
 Purchase Order: 1042040 Vendor: [Pittmans Tree & Landscaping Inc](#)
 Merchandise Amount: 14,097.92 USD
 Merchandise Receipt: 3,524.48 USD
 Merchandise Returned: 0.00 USD
 Merchandise Invoice: 3,524.48 USD
 Merchandise Matched: 3,524.48 USD

Lines Customize | Find | View All | First 1-2 of 2 Last

Details **Receipt** Invoice Matched RTV

Line	Item	Item Description	UOM	Qty Received	Qty Accepted	Open Quantity	Open Amount	Currency	
1	9888878700	TREE TRIMMING AND BRUSH REMOVA	HUR	16.0000	16.0000	48.0000	9,427.680	USD	
2	9758677050	TRUCKS, HIRED EQUIPMENT, PER V	HUR	16.0000	16.0000	48.0000	1,145.760	USD	

Unit: 50100 PO ID: 1042040 Line 1 Item ID 9888878700

Receipt Customize | Find | View All | First 1 of 1 Last

Sched Num	BU Recv	Receipt No	Receipt Line	Status	Seq	Vndr Rcpt Qty	Vndr Reject Qty	Merchandise Amt	Currency
1	50100	0001568239	1	Closed	1	16.0000	0.0000	3142.560	USD



Activity Summary Page - Invoice Tab

The **Invoice** tab is used to view additional information about vouchers associated with the PO. Click an **Invoice** icon to open the page that provides a list of all the vouchers and links that take you to a **Voucher Inquiry** page where you can view detailed voucher information.

Activity Summary

Business Unit: 50100 PO Status: Dispatched
 Purchase Order: 1042040 Vendor: [Pittmans Tree & Landscaping Inc](#)
 Merchandise Amount: 14,097.92 USD
 Merchandise Receipt: 3,524.48 USD
 Merchandise Returned: 0.00 USD
 Merchandise Invoice: 3,524.48 USD
 Merchandise Matched: 3,524.48 USD

Lines Customize | Find | View All | First 1-2 of 2 Last

Details | Receipt | **Invoice** | Matched | RTV |

Line	Item	Item Description	UOM	Quantity Invoiced	Amount Only	Amt Invoiced	Currency	Un-invoiced Quantity	Un-invoiced Amount	Currency	
1	9888878700	TREE TRIMMING AND BRUSH REMOVA	HUR	16.00	<input type="checkbox"/>	3,142.560	USD	48.0000	9,427.680	USD	
2	9758677050	TRUCKS, HIRED EQUIPMENT, PER V	HUR	16.00	<input type="checkbox"/>	381.920	USD	48.0000	1,145.760	USD	

Unit: 50100 PO No.:1042040 Line 1 Item ID 9888878700

Invoice Customize | Find | View All | First 1 of 1 Last

Sched Num	AP Unit	Voucher	Line	Quantity Invoiced	Amount Invoiced
1	50100	00114129	1	16.00	3142.560 <input type="button" value="+"/> <input type="button" value="-"/>



Review Change History and Review Change Orders Pages

You can review the history (changes) of a purchase order on the **Review Change History** page or the **Review Change Orders** page.

Both pages allow you to search for the desired PO and lists the change(s) that occurred to it on tabs which are almost identical. On the **Review Change History** page, you can search using **PO Number** and/or **Change Order Number**. This page provides details on the original PO, as well as changes.

The information is virtually the same on both pages, however the **Review Change History** page contains a **Batch** tab that is not included on the **Review Change Orders** page. The **Batch** tab displays the date that the change was made and the **Batch** ID of the batch that created the change order.

You can navigate to the **Review Change History** page using the following path:

Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change History

Or, you can navigate to the **Review Change Orders** page using the following path:

Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change Orders

Enter your search criteria on either page and click **Search**.



Review Change History Page - Batch Tab

The **Review Change History** page includes four tabs that display different information about the change to the PO.

The **Batch** tab displays the date that the change was made and the **Batch ID** of the batch that created the change order.

Navigation: Favorites | Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change History

Tab Selection: **Batch** | Header Changes | Line Changes | Ship Changes

Unit: 50100 PO ID: 1042040

Batch: 1

Revision Date: 10/09/2012

Batch Summary: Find | View All | First | 1 of 1 | Last



Review Change History Page - Header Changes Tab

The **Header Changes** tab is on both the **Review Change History** and **Review Change Orders** pages and displays the changes to the header, which user issued the change, and the date of change.

Batch		Header Changes		Line Changes		Ship Changes	
Unit:	50100	PO ID:	1042040				
PO Header				Customize Find View All First 1-5 of 5 Last			
Batch	Seq	Description	Value		User Modify	Last Change Date	
1	1	Billing Location	NOVA EQP	<u>OTHER</u>	NORMA.SETTLE	10/09/2012 5:21:33PM	
1	1	Change Type	C	<u>OTHER</u>	NORMA.SETTLE	10/09/2012 5:21:33PM	
1	1	PO Status	O	<u>OTHER</u>	NORMA.SETTLE	10/09/2012 5:21:33PM	
1	2	Change Type	C	<u>OTHER</u>	NORMA.SETTLE	10/09/2012 5:21:53PM	
1	2	PO Status	PA	<u>OTHER</u>	NORMA.SETTLE	10/09/2012 5:21:53PM	



Change History Page - Line Changes Tab

The **Line Changes** tab is on both the **Review Change History** and **Review Change Orders** pages and displays the changes to the PO line(s), the user who created the change, and the date of change.

<u>B</u> atch	<u>H</u> ader Changes	Line Changes	<u>S</u> hip Changes			
Unit:	50100	PO ID:	1012301			
Changes to PO Lines Customize Find View All First 1 of 1 Last						
Line	Batch	Seq	Description	Value	User Modify	Last Change Date
1	1	1	Status	X	KIM.BREWER	03/29/2012 9:51:15AM



Change History Page - Ship Changes Tab

The **Ship Changes** tab is on both the **Review Change History** and **Review Change Orders** pages and displays changes to the quantity and/or price, the user who created the change, and the date of change.

CARDINAL

Favorites | Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change History

Batch | Header Changes | Line Changes | **Ship Changes**

Unit: 50100 PO ID: 0001002830

Changes to PO Schedules Customize | Find | View All | 1-5 of 15 | Last

Line	Sched	Batch	Seq	Description	Value		User Modify	Last Change Date
1	1	1	1	Change Type	C	QUANTITY	JUDITH.FLYNN	03/22/2012 8:18:02AM
1	1	1	1	Merchandise Amount	9300.00000	QUANTITY	JUDITH.FLYNN	03/22/2012 8:18:02AM
1	1	1	1	Purchase Order Quantity	31.00000	QUANTITY	JUDITH.FLYNN	03/22/2012 8:18:02AM
2	1	1	1	Change Type	C	QUANTITY	JUDITH.FLYNN	03/22/2012 8:18:21AM
2	1	1	1	Merchandise Amount	1860.00000	QUANTITY	JUDITH.FLYNN	03/22/2012 8:18:21AM

[Return to Search](#) [Notify](#)

[Batch](#) | [Header Changes](#) | [Line Changes](#) | [Ship Changes](#)



Lesson 5: Summary

In this lesson, you learned:

- How to view details of a PO using the **Purchase Order Inquiry**.
- How to review the change order history of a PO using the **Review Change History** and **Review Change Orders** pages.



Lesson 6: Purchase Order Reports

This lesson covers the following topic:

- Purchase Order Reports



Purchase Order Reports

Purchase order reports can be run at various intervals. The Buyer will be able to run these reports. Numerous key purchase order reports are available including:

- PO Dispatch/Print Report
- Expediting Report
- PO Listings Report
- Status Listings Report
- Requisition/PO Xref Report
- PO Balance Detail Report



PO Dispatch/Print Report

The **PO Dispatch/Print Report** prints a hard copy of a PO.

You can navigate to this report using the following path:

Main Menu > Purchasing > Purchase Orders > Review PO Information > Print POs

The **Print POs** run control page will display. Add a new, or find an existing, run control and enter the report parameters. Click **Run**. Run will kick off the report, as well as save the **Run Control ID**, if new, and parameters.

Favorites | Main Menu > Purchasing > Purchase Orders > Review PO Information > Print POs

Print POs

Run Control ID: [Report Manager](#) [Process Monitor](#)

Language: Specified Recipient's

Report Request Parameters	
Business Unit:	<input type="text" value="50100"/> To: <input type="text" value="50100"/>
PO ID:	<input type="text" value="0001130481"/> Select Purchase Order
Contract SetID:	<input type="text"/>
Contract ID:	<input type="text"/>
Release:	<input type="text"/>
From Date:	<input type="text"/>
Through Date:	<input type="text"/>
Vendor ID:	<input type="text"/>
Buyer:	<input type="text"/>

Statuses to Include		
<input type="checkbox"/> Approved	<input type="checkbox"/> Dispatched	<input type="checkbox"/> Canceled
<input type="checkbox"/> Open	<input type="checkbox"/> Pending	<input type="checkbox"/> Completed

Miscellaneous Options	
*Hold Status:	<input type="text" value="NOT On Hold"/>
*Chartfields:	<input type="text" value="Recycled AND Valid Chartfields"/>
Change Orders:	<input type="text" value="Changed and UnChanged Orders"/>
<input type="checkbox"/> Print Changes Only	
<input checked="" type="checkbox"/> Print PO Item Description	
<input type="checkbox"/> Print Duplicate	
Number Of Copies:	<input type="text" value="1"/>
Sort By:	<input type="text" value="Sort by Line Number"/>



PO Dispatch/Print Report (continued)



Purchase Order

Dispatch via Print

Purchase Order	Date	Revision	Page
50100-0001050510	11/19/2012		1
Payment Terms	Freight Terms	Ship Via	
Due Now	FOB Dest, Freight Prepaid	Common	
Buyer	Phone	Currency	
Hall, Mike (VDOT)	804/786-3150	USD	

VA Dept of Transportation

VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States

Vendor: 0000044749
A & P Services, LLC
po box 1136
VA10055476
EVAAD149646
pisgah forest NC 28768

Ship To: CNTRL OF1
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States

Bill To: VDOT Central Office
1221 E. Broad St.
Richmond VA 23219
United States

Tax Exempt? Y Tax Exempt ID: 546001730

Replenishment Option: Standard

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1- 1	DW GUARDRAIL ON-CALL FREDERICK Contract ID: XM0000103149	Version 1	1.00	HUR	437,182.2400	437,182.24	11/19/2012
2- 1	DW GUARDRAIL ON-CALL FREDERICK Contract ID: XM0000103149	Version 1	1.00	HUR	21,859.1100	21,859.11	11/19/2012
3- 1	DW GUARDRAIL ON-CALL FREDERICK Contract ID: XM0000103149	Version 1	1.00	HUR	-21,859.1100	-21,859.11	11/19/2012

This is a CONFIRMING purchase order for Contract number XM0000103149 DO NOT DUPLICATE

Total PO Amount 437,182.24



Expediting Report

The Expediting Report:

- Populates the **Expediting Report by Buyer, Supplier, and Due Date.**
- Provides PO details, such as late days and due date, sorted by buyer.
- Helps to determine which POs may require expediting.

You can navigate to this report using the following path:

Main Menu > Purchasing > Purchase Orders > Reports > Expediting

An **Expediting Report** run control page will appear. You will need to add or find an existing run control, enter the report parameters, and click on **Run**.

Expediting

Run Control ID: [Report Manager](#) [Process Monitor](#) Run

Language:

Report Request Parameters

From Date: Through Date:

Vendor SetID:

Vendor ID:

Buyer:

ORACLE	Report ID: POY4006 User ID: PPS_MIKE.HALL Run Control: PO_DEATAIL	PeopleSoft Purchasing EXPEDITING REPORT BY BUYER	Page No. 1 Run Date 11/27/2012 Run Time 4:31:10PM
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Due Dates Included: 8/1/2012 Thru: 9/30/2012
Buyer: Hall, Mike (VDOT)

Days		PO ID	Contract ID	Rel_Vendor ID	Vendor Name	Item ID	Item Description	Line_Schd	Ord Qty	UOM	Ship to ID	
Due Date	Late											
8/1/2012	118	50100	0001033900	CM912PMB102084	1 000002301 Lane Construction Corp	9137101000	PLANT MIX	1	1	1.00	HUR	CNTRL OF
				CM912PMB102084	2	9137101000	PLANT MIX	2	1	1.00	HUR	CNTRL OF
				CM912PMB102084	3	9137101000	PLANT MIX	3	1	1.00	HUR	CNTRL OF
8/2/2012	117	50100	0001034175	7M812PMBF99320	1 0000031474 W-L Construction & Paving Inc	9137101000	PLANT MIX SCHEDULE (PM-SF-12)	1	1	1.00	HUR	CNTRL OF
				7M812PMBF99320	2	9137101000	PLANT MIX SCHEDULE (PM-SF-12)	2	1	1.00	HUR	CNTRL OF
				7M812PMBF99320	3	9137101000	PLANT MIX SCHEDULE (PM-SF-12)	3	1	1.00	HUR	CNTRL OF
8/3/2012	116	50100	0001034405	S0006910ND1	1 0000022978 Interstate Road Management Corp	9137101000	PAVEMENT SKID RESISTENCE	1	1	1.00	HUR	CNTRL OF
				S0006910ND1	2	9137101000	PAVEMENT SKID RESISTENCE	2	1	1.00	HUR	CNTRL OF
				S0006910ND1	3	9137101000	PAVEMENT SKID RESISTENCE	3	1	1.00	HUR	CNTRL OF
8/5/2012	113	50100	0001034565	FD006944OR01	1 0000031864 Waco Inc	9137101000	REGIONAL BUILDING DEMOLITION A	1	1	1.00	HUR	CNTRL OF
				FD006944OR01	2	9137101000	REGIONAL BUILDING DEMOLITION A	2	1	1.00	HUR	CNTRL OF
				FD006944OR01	3	9137101000	REGIONAL BUILDING DEMOLITION A	3	1	1.00	HUR	CNTRL OF
8/7/2012	112	50100	0001034958	Y0006917ND1	1 0000007300 Kickin Asphalt Paving & Sealing	9137101000	HRRR SEGMENT	1	1	1.00	HUR	CNTRL OF
				Y0006917ND1	2	9137101000	-DISTRICT WIDE PA HRRR SEGMENT	2	1	1.00	HUR	CNTRL OF
				Y0006917ND1	3	9137101000	-DISTRICT WIDE PA HRRR SEGMENT	3	1	1.00	HUR	CNTRL OF
8/8/2012	111	50100	0001035210	E0006910B29	1 0000049917 Orders Construction Co Inc	9137101000	SUPERSTRUCTURE REPLACEMENT	1	1	1.00	HUR	CNTRL OF
				E0006910B29	2	9137101000	SUPERSTRUCTURE REPLACEMENT	2	1	1.00	HUR	CNTRL OF
				E0006910B29	3	9137101000	SUPERSTRUCTURE REPLACEMENT	3	1	1.00	HUR	CNTRL OF
8/9/2012	110	50100	0001035524	800097885ND1	1 0000026135 McClain & Co Inc	9137101000	OVERHEAD BRIDGE	1	1	1.00	HUR	CNTRL OF
				800097885ND1	2	9137101000	PARAPET MOUNTED OVERHEAD BRIDGE	2	1	1.00	HUR	CNTRL OF
				800097885ND1	3	9137101000	PARAPET MOUNTED OVERHEAD BRIDGE	3	1	1.00	HUR	CNTRL OF
8/9/2012	110	50100	0001035526	Y00102861ND1	1 0000033521 J.L.KENT & SONS INC	9137101000	PIPE INSTALLATION	1	1	1.00	HUR	CNTRL OF

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Expediting Report (continued)

ORACLE

Report ID: POY400C
 User ID: PPS_MIKE.HALL
 Run Control: PO_DEATAIL

PeopleSoft Purchasing
 EXPEDITING REPORT BY BUYER

Page No. 1
 Run Date 11/27/2012
 Run Time 4:31:10PM

Due Dates Included: 8/1/2012 Thru: 9/30/2012
 Buyer: Hall, Mike (VDOT)

Due Date	Days Late	BU	PO ID	Contract ID	Rel	Vendor ID	Vendor Name	Item ID	Item Description	Line	Schd	Ord Qty	UOM	Shipto ID
8/1/2012	118	50100	0001033900	CM912PMB102084	1	0000002301	Lane Construction Corp	9137101000	PLANT MIX	1	1	1.00	HUR	CNTRL OF
				CM912PMB102084	2			9137101000	PLANT MIX	2	1	1.00	HUR	CNTRL OF
				CM912PMB102084	3			9137101000	PLANT MIX	3	1	1.00	HUR	CNTRL OF
8/2/2012	117	50100	0001034175	7M812PMSF99326	1	0000031474	W-L Construction & Paving Inc	9137101000	PLANT MIX SCHEDULE (PM-8F-12)	1	1	1.00	HUR	CNTRL OF
				7M812PMSF99326	2			9137101000	PLANT MIX SCHEDULE (PM-8F-12)	2	1	1.00	HUR	CNTRL OF
				7M812PMSF99326	3			9137101000	PLANT MIX SCHEDULE (PM-8F-12)	3	1	1.00	HUR	CNTRL OF
8/3/2012	116	50100	0001034405	S00098916ND1	1	0000022978	Interstate Road Management Corp	9137101000	PAVEMENT SKID RESISTENCE	1	1	1.00	HUR	CNTRL OF
				S00098916ND1	2			9137101000	PAVEMENT SKID RESISTENCE	2	1	1.00	HUR	CNTRL OF
				S00098916ND1	3			9137101000	PAVEMENT SKID RESISTENCE	3	1	1.00	HUR	CNTRL OF
8/6/2012	113	50100	0001034585	FD0099440R01	1	0000031884	Waco Inc	9137101000	REGIONAL BUILDING DEMOLITION A	1	1	1.00	HUR	CNTRL OF
				FD0099440R01	2			9137101000	REGIONAL BUILDING DEMOLITION A	2	1	1.00	HUR	CNTRL OF
				FD0099440R01	3			9137101000	REGIONAL BUILDING DEMOLITION A	3	1	1.00	HUR	CNTRL OF
8/7/2012	112	50100	0001034958	Y00098917ND1	1	0000007366	Kickin Asphalt Paving & Sealing	9137101000	HRRR SEGMENT -DISTRICT WIDE PA	1	1	1.00	HUR	CNTRL OF
				Y00098917ND1	2			9137101000	HRRR SEGMENT -DISTRICT WIDE PA	2	1	1.00	HUR	CNTRL OF
				Y00098917ND1	3			9137101000	HRRR SEGMENT -DISTRICT WIDE PA	3	1	1.00	HUR	CNTRL OF
8/8/2012	111	50100	0001035210	E00089810B29	1	0000046617	Orders Construction Co Inc	9137101000	SUPERSTRUCTURE REPLACEMENT	1	1	1.00	HUR	CNTRL OF
				E00089810B29	2			9137101000	SUPERSTRUCTURE REPLACEMENT	2	1	1.00	HUR	CNTRL OF
				E00089810B29	3			9137101000	SUPERSTRUCTURE REPLACEMENT	3	1	1.00	HUR	CNTRL OF
8/9/2012	110	50100	0001035524	600097885ND1	1	0000026135	McClain & Co Inc	9137101000	OVERHEAD BRIDGE PARAPET MOUNTE	1	1	1.00	HUR	CNTRL OF
				600097885ND1	2			9137101000	OVERHEAD BRIDGE PARAPET MOUNTE	2	1	1.00	HUR	CNTRL OF
				600097885ND1	3			9137101000	OVERHEAD BRIDGE PARAPET MOUNTE	3	1	1.00	HUR	CNTRL OF
8/9/2012	110	50100	0001035528	Y00102861ND1	1	0000033521	J L KENT & SONS INC	9137101000	OVERHEAD BRIDGE PARAPET MOUNTE PIPE INSTALLATION	1	1	1.00	HUR	CNTRL OF



PO Listings Report

The **PO Listings Report** creates a PO listing **By PO Date, By Supplier, By Buyer, and By Status.**

You can navigate to this report using the following path:

Main Menu > Purchasing > Purchase Orders > Reports > Listings

A **Listings** run control page will appear. You will need to add, or find an existing, run control, enter the report parameters, and click on **Run**. The **Process Scheduler Request** page will appear and you will select how you want the list run and click **OK** to kick off the report.

Note: The report displayed here is **By Buyer**.

Process Scheduler Request

User ID: YANI.HO Run Control ID: print_po

Server Name: [dropdown] Run Date: 06/02/2016 [calendar icon]

Recurrence: [dropdown] Run Time: 11:24:13AM [Reset to Current Date/Time]

Time Zone: [dropdown]

Process List

Select	Description	Process Name	Process Type	*Type	*Format
<input type="checkbox"/>	PO Listing by PO Date	POY4010-	Crystal	Web [dropdown]	PDF [dropdown]
<input type="checkbox"/>	PO Listing By Vendor	POY4011-	Crystal	Web [dropdown]	PDF [dropdown]
<input checked="" type="checkbox"/>	PO Listing By Buyer	POY4012-	Crystal	Web [dropdown]	PDF [dropdown]
<input type="checkbox"/>	PO Listing By Status	POY4013-	Crystal	Web [dropdown]	PDF [dropdown]

OK Cancel

ORACLE Report ID: POY4012 PPS_MIKE_HALL People of Purchasing PO LISTING BY BUYER Page No. 1

User ID: PO_DEATLX Run Control: PO_DEATLX Run Date 11/27/2012

PO Data Includes: 8/1/2012 thru: 6/30/2012

Buyer: Hall, Mike (VDOT)

BU	PO ID	Contract ID	Rel	Change Order	PO Date	Vendor ID	Name	PO Status	Hold	Rev	Curr	Amount
50100	0001033600	CA612PMB102084	3		18/1/2012	000002301	Lane Construction Corp	Dispatched	N	N	USD	8,847,341.58
50100	0001033601	F000101603N01	3		09/1/2012	0000031474	W-L Construction & Paving Inc	Dispatched	N	N	USD	1,057,569.52
50100	0001034175	7M812PMB969326	3		18/2/2012	0000031474	W-L Construction & Paving Inc	Dispatched	N	N	USD	564,831.12
50100	0001034176	J0006862N01	3		08/2/2012	0000031844	LHS-Lawyer Paving Co Inc	Dispatched	N	N	USD	273,223.13
50100	0001034177	KM312PMB102401	3		08/2/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,072,768.13
50100	0001034178	PM3123TC100690	3		08/2/2012	0000039449	Whitehurst Paving Co Inc	Dispatched	N	N	USD	963,246.97
50100	0001034405	S0000691FN01	3		18/3/2012	0000022878	Intertax Road Management Corp	Dispatched	N	N	USD	628,400.00
50100	0001034585	F0006446FN01	3		18/5/2012	0000031864	Waco Inc	Dispatched	N	N	USD	745,987.80
50100	0001034611	LM512PMA102014	3		08/6/2012	0000049318	Branscome Inc	Dispatched	N	N	USD	1,848,261.93
50100	0001034656	40067223N01	3		08/7/2012	0000027944	Vesta Excavating Ltd	Dispatched	N	N	USD	234,821.25
50100	0001034657	LKCPM5H10103118	3		09/7/2012	0000049851	Base Construction Co LLC	Dispatched	N	N	USD	2,355,727.73
50100	0001034658	Y0006917FN01	3		18/7/2012	0000007366	Kidkin Asphalt Paving & Sealing	Dispatched	N	N	USD	1,498,324.01
50100	0001035210	E00069810E20	3		18/8/2012	0000049817	Orders Construction Co Inc	Dispatched	N	N	USD	5,455,268.00
50100	0001035523	5M812PMB306938	3		08/9/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	3,462,120.33
50100	0001035524	E0006788N01	3		18/9/2012	0000029136	McClain & Co Inc	Dispatched	N	N	USD	64,820.80
50100	0001035525	LM512PMB102268	3		08/9/2012	0000049318	Branscome Inc	Dispatched	N	N	USD	4,830,778.42
50100	0001035526	Y00102061FN01	3		18/9/2012	0000033521	J L KENT & SONS INC	Dispatched	N	N	USD	103,169.00
50100	0001035725	C0009438FN01	3		09/10/2012	0000020450	Rustler Construction Inc	Dispatched	N	N	USD	823,325.70
50100	0001035964	A0000915C001	3		18/10/2012	0000024963	A & M Concrete Corp	Dispatched	N	N	USD	360,728.48
50100	0001036205	C0000651C001	3		08/14/2012	0000028669	Tavares Concrete Company/Inc	Dispatched	N	N	USD	843,047.96
50100	0001036206	X00100827FN01	3		08/14/2012	0000028676	A-ANNANDALE INC	Dispatched	N	N	USD	268,993.00
50100	0001036474	5M812PMB1011933	3		09/15/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,427,028.03
50100	0001036738	B0006434M0118	3		18/16/2012	0000024969	Martins Construction Corp	Dispatched	N	N	USD	256,820.80
50100	0001037167	5M812PMT1017702	3		18/20/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,937,028.07
50100	0001037168	J00069178878	3		38/20/2012	0000027947	Burleigh Construction Co Inc	Dispatched	N	N	USD	1,194,723.00
50100	0001037189	HM312PMB1002699	3		08/20/2012	0000041841	Cakery Construction Inc	Dispatched	N	N	USD	1,471,518.77
50100	0001037223	300017951FN01	3		18/21/2012	0000026910	GENERAL EXCAVATION INC	Dispatched	N	N	USD	876,506.61
50100	0001037224	30002241FN01	3		18/21/2012	0000039062	Halcy Chisholm & Morris Inc	Dispatched	N	N	USD	441,873.61
50100	0001037225	X00084478M001	3		08/21/2012	0000025939	Curtis Contracting Inc	Dispatched	N	N	USD	541,273.52
50100	0001037862	30000224FN01	3		09/22/2012	0000026962	Halcy Chisholm & Morris Inc	Dispatched	N	N	USD	458,948.40
50100	0001037908	5M812PMB60335	3		09/23/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	2,306,212.88
50100	0001037909	7M812PMB101938	3		08/23/2012	0000031474	W-L Construction & Paving Inc	Dispatched	N	N	USD	1,246,368.81
50100	0001037910	AM0006918N01	3		08/23/2012	0000039427	FORT MYER CONSTRUCTION Corp	Dispatched	N	N	USD	391,222.40
50100	0001037911	G00010254FN01	3		28/23/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,480,940.53

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PO Listings Report (continued)

ORACLE	Report ID: POY4012	PeopleSoft Purchasing	Page No. 1
	User ID: PPS_MIKE.HALL	PO LISTING BY BUYER	Run Date 11/27/2012
	Run Control: PO_DEATAIL		Run Time 4:35:42PM

PO Dates Included: 8/1/2012 Thru: 9/30/2012
 Buyer: Hall, Mike (VDOT)

BU	PO ID	Contract ID	Rel	Change Order	PO Date	Vendor ID	Name	PO Status	Hold	Rcv	Curr	Amount
50100	0001033900	CM912PMB102084	3		18/1/2012	0000002301	Lane Construction Corp	Dispatched	N	N	USD	8,847,341.58
50100	0001033901	F000101583N01	3		08/1/2012	0000031474	W-L Construction & Paving Inc	Dispatched	N	N	USD	1,057,589.52
50100	0001034175	7M812PM8F98326	3		18/2/2012	0000031474	W-L Construction & Paving Inc	Dispatched	N	N	USD	564,631.12
50100	0001034176	J00098862N01	3		08/2/2012	0000031844	LHSawyer Paving Co Inc	Dispatched	N	N	USD	273,223.13
50100	0001034177	KM312PMK102401	3		08/2/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,072,786.13
50100	0001034178	PM312STC100990	3		08/2/2012	0000036449	Whitehurst Paving Co Inc	Dispatched	N	N	USD	983,249.97
50100	0001034405	S00098918N01	3		18/3/2012	0000022978	Interstate Road Management Corp	Dispatched	N	N	USD	826,490.00
50100	0001034585	F00099440R01	3		18/6/2012	0000031884	Waco Inc	Dispatched	N	N	USD	745,987.80
50100	0001034611	UM512PMA100014	3		08/6/2012	0000049318	Branscome Inc	Dispatched	N	N	USD	1,846,261.93
50100	0001034958	400057223N01	3		08/7/2012	0000027044	Vess Excoavating Ltd	Dispatched	N	N	USD	234,821.25
50100	0001034957	UM2PM5H101031B	3		08/7/2012	0000049651	Basic Construction Co LLC	Dispatched	N	N	USD	2,355,727.73
50100	0001034958	Y00098917N01	3		18/7/2012	0000007366	Kickin Asphalt Paving & Sealing	Dispatched	N	N	USD	1,488,324.01
50100	0001035210	E00089810B29	3		18/8/2012	0000046617	Orders Construction Co Inc	Dispatched	N	N	USD	5,455,268.00
50100	0001035523	5M812PM8G99328	3		08/9/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	3,462,120.33
50100	0001035524	600097885N01	3		18/9/2012	0000026135	McClain & Co Inc	Dispatched	N	N	USD	64,802.80
50100	0001035525	UM512PMM102568	3		08/9/2012	0000049318	Branscome Inc	Dispatched	N	N	USD	4,830,775.42
50100	0001035526	Y00102661N01	3		18/9/2012	0000033521	J L KENT & SONS INC	Dispatched	N	N	USD	103,169.00
50100	0001035725	C00084385M01	3		08/10/2012	0000030450	Rustler Construction Inc	Dispatched	N	N	USD	823,325.70
50100	0001035954	A00093513C01	3		18/13/2012	0000024983	A & M Concrete Corp	Dispatched	N	N	USD	390,729.46
50100	0001036205	C00096510C01	3		08/14/2012	0000028569	Tavares Concrete CompanyInc	Dispatched	N	N	USD	843,047.95
50100	0001036206	X00100827N01	3		08/14/2012	0000028576	A-ANNANDALE INC	Dispatched	N	N	USD	298,663.00
50100	0001036474	5M812PMB101933	3		08/15/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,427,028.03
50100	0001036738	B00093434M01B	3		18/16/2012	0000024909	Martins Construction Corp	Dispatched	N	N	USD	258,620.80
50100	0001037167	5M812PMT101702	3		18/20/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,937,026.07
50100	0001037168	J00089178B76	3		38/20/2012	0000027847	Burleigh Construction Co Inc	Dispatched	N	N	USD	1,184,723.00
50100	0001037169	KM312PMD100999	3		08/20/2012	0000041841	Colony Construction Inc	Dispatched	N	N	USD	1,471,516.77
50100	0001037223	300017951N01	3		18/21/2012	0000029310	GENERAL EXCAVATION INC	Dispatched	N	N	USD	875,506.61
50100	0001037224	30082241N01	3		18/21/2012	0000036092	Haley Chisholm & Morris Inc	Dispatched	N	N	USD	441,873.61
50100	0001037225	X00084478M501	3		08/21/2012	0000025839	Curtis Contracting Inc	Dispatched	N	N	USD	541,273.52
50100	0001037662	300082248N01	3		08/22/2012	0000036092	Haley Chisholm & Morris Inc	Dispatched	N	N	USD	456,046.40
50100	0001037908	5M812PM8M99335	3		08/23/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	2,399,212.88
50100	0001037909	7M812PMZ101935	3		08/23/2012	0000031474	W-L Construction & Paving Inc	Dispatched	N	N	USD	1,249,398.81
50100	0001037910	AM00099164N01	3		08/23/2012	0000035427	FORT MYER CONSTRUCTION Corp	Dispatched	N	N	USD	391,222.40
50100	0001037911	G000102541N01	3		28/23/2012	0000025845	Adams Construction Co	Dispatched	N	N	USD	1,480,840.53



Status Listings Report

The **Status Listings Report** can be run two ways from the **Process Scheduler Request** page:

- **Order Status Report by Supplier** provides PO status information sorted by supplier.
- **Order Status by Item** provides PO status information sorted by item.

You can navigate to this report using the following path:

Main Menu > Purchasing > Purchase Orders > Reports > Status Listings

A **Status Listings** run control page will appear. You will need to add, or find an existing, run control, enter the report parameters, and click on **Run**. The **Process Scheduler Request** page will appear and you will select how you want the list run and click **OK** to kick off the report.

Note: The report displayed here is **By Vendor**.

Process Scheduler Request

User ID: YANI.HO Run Control ID: print_po

Server Name: [dropdown] Run Date: 06/02/2016 [calendar icon]

Recurrence: [dropdown] Run Time: 11:31:27AM [Reset to Current Date/Time]

Time Zone: [dropdown]

Select	Description	Process Name	Process Type	*Type	*Format
<input type="checkbox"/>	Order Status By Vendor	POY4020-	Crystal	Web [dropdown]	PDF [dropdown]
<input type="checkbox"/>	Order Status By Item	POY4021-	Crystal	Web [dropdown]	PDF [dropdown]

ORACLE Report ID: POY4526 PeopleSoft Purchasing Page No. 1
 User ID: PPS_MIKE.HALL ORDER STATUS BY VENDOR Run Date 11/27/2012
 Run Control: PO_DEATAIL Run Time 4:42:19PM

Due Dates Included: 8/1/2012 Thru: 6/30/2012

Business Unit	Contract ID	Version	Rel	Item ID	Item Description	Line	Schd	Order Qty	UOM	Curr	Order Amt	Due Date	Ship to ID
Vendor ID: 000000145	Name: Alert Visions of North America Inc	PO ID: 0001034913	Date: 6/7/2012	PO Status: Dispatched	Buyer: Sitzer, Donna M (VDOT)								
	00000000000031922	3		2005661202	LG HI-VIZ TEE, 2-TONE CLASS	1	1	2.00	EA	USD	57.00	8/7/2012	WLM5BG RO
	00000000000031922	3		2005661206	XL HI-VIZ TEE, 2-TONE CLASS	2	1	8.00	EA	USD	240.80	8/7/2012	WLM5BG RO
	00000000000031922	3		2005661210	3XL HI-VIZ TEE, 2-TONE CLASS	3	1	2.00	EA	USD	64.80	8/7/2012	WLM5BG RO
				2005661208	SHIRTS, TEE, HI-VIZ 2XL, HI-VIZ TEE, 2-TONE CLASS 3 RETRO TRIM/SLEEVE BNDG #6601	4	1	2.00	EA	USD	10.00	8/8/2012	WLM5BG RO
PO ID: 0001036202	Date: 6/14/2012	PO Status: Dispatched	2001850000	JACKETS, DRESS, MALE, MAN MADE OR MIXED BLEND FABRIC, FULL C JACKETS, DRESS, MALE, MAN MADE OR MIXED BLEND FABRIC, FULL C	1	1	899.00	EA	USD		899.00	8/14/2012	NOVA TFO
	3450945500			PANTS, SAFETY MEASURE TO SIZE, PANTS SAFETY	2	1	960.75	EA	USD		960.75	8/14/2012	NOVA TFO
	2008567050			SHIRTS, UNIFORM, MEN'S & WOMEN'S, LONG OR SHORT SLEEVES ALL SIZES, VIRGINIA DOT EMBLEM	3	1	484.50	EA	USD		484.50	8/14/2012	NOVA TFO
Vendor ID: 000000388	Name: Martin Enterprises	PO ID: 0001034929	Date: 6/7/2012	PO Status: Dispatched	Buyer: Beaver, Deborah P. (VDOT)								
				5406010000	STAKES, CONST, GRADE STRUCTURAL STAKES, CONST, GRADE STRUCTURAL	1	1	500.00	EA	USD	275.00	8/7/2012	NOVA DIS
				5406010000	STAKES, CONST, GRADE STRUCTURAL STAKES, CONST, GRADE STRUCTURAL	2	1	500.00	EA	USD	325.00	8/7/2012	NOVA DIS
Vendor ID: 0000000478	Name: Martin Wong Group LLC	PO ID: 0001036269	Date: 6/4/2012	PO Status: Dispatched	Buyer: Vaughn, Lorie Ann (VDOT)								
				0688860000	TREE REMOVAL SERVICES, INCLUDES THE CUTTING, GRUBBING, REMOV TREE REMOVAL SERVICES, INCLUDES THE CUTTING, GRUBBING, REMOV	1	1	1.00	HUR	USD	1,045.00	8/4/2012	CHNTLY AHQ

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Status Listings Report (continued)

ORACLE		Report ID: POY4020	PeopleSoft Purchasing		Page No. 1							
		User ID: PPS_MIKE.HALL	ORDER STATUS BY VENDOR		Run Date 11/27/2012							
		Run Control: PO_DEATAIL			Run Time 4:42:19PM							
Due Dates Included: 8/1/2012 Thru: 9/30/2012												
Business Unit: 50100												
Contract ID	Version	Rel	Item ID	Item Description	Line	Schd	Order Qty	UOM	Curr	Order Amt	Due Date	Shipto ID
Vendor ID: 000000145 Name: Alert Visions of North America Inc												
PO ID: 0001034913 Date: 8/7/2012 PO Status: Dispatched Buyer: Sitzler, Donna M (VDOT)												
000000000000031922	3		2005661202	LG. HI-VIZ TEE, 2-TONE CLASS	1	1	2.00	EA	USD	57.00	8/7/2012	WLMSBG RO
000000000000031922	3		2005661208	XL. HI-VIZ TEE, 2-TONE CLASS	2	1	8.00	EA	USD	240.80	8/7/2012	WLMSBG RO
000000000000031922	3		2005661210	3XL. HI-VIZ TEE, 2-TONE CLASS	3	1	2.00	EA	USD	64.00	8/7/2012	WLMSBG RO
			2005661208	SHIRTS, TEE, HI-VIZ 2XL. HI-VIZ TEE, 2-TONE CLASS 3 RETRO TRIM/SLEEVE BNDS #9601	4	1	2.00	EA	USD	10.00	8/8/2012	WLMSBG RO
PO ID: 0001036202 Date: 8/14/2012 PO Status: Dispatched Buyer: Ho, Yari (VDOT)												
			2001850000	JACKETS, DRESS, MALE, MAN MADE OR MIXED BLEND FABRIC, FULL C JACKETS, DRESS, MALE, MAN MADE OR MIXED BLEND FABRIC, FULL C	1	1	899.00	EA	USD	899.00	8/14/2012	NOVA TFO
			3450845500	PANTS, SAFETY MEASURE TO SIZE, PANTS SAFETY	2	1	960.75	EA	USD	960.75	8/14/2012	NOVA TFO
			2008567050	SHIRTS, UNIFORM, MEN'S & WOMEN'S, LONG OR SHORT SLEEVES ALL SIZES, VIRGINIA DOT EMBLEM	3	1	484.50	EA	USD	484.50	8/14/2012	NOVA TFO
Vendor ID: 000000386 Name: Martin Enterprises												
PO ID: 0001034929 Date: 8/7/2012 PO Status: Dispatched Buyer: Beaver, Deborah P. (VDOT)												
			5409010000	STAKES, CONST. GRADE STRUCTURAL STAKES, CONST. GRADE STRUCTURAL	1	1	500.00	EA	USD	275.00	8/7/2012	NOVA DIS
			5409010000	STAKES, CONST. GRADE STRUCTURAL STAKES, CONST. GRADE STRUCTURAL	2	1	500.00	EA	USD	325.00	8/7/2012	NOVA DIS
Vendor ID: 000000478 Name: Martin Wong Group LLC												
PO ID: 0001039269 Date: 9/4/2012 PO Status: Dispatched Buyer: Vaughn, Lorrie Ann (VDOT)												
			968880000	TREE REMOVAL SERVICES. INCLUDES THE CUTTING, GRUBBING, REMOVE TREE REMOVAL SERVICES. INCLUDES THE CUTTING, GRUBBING, REMOVE	1	1	1.00	HUR	USD	1,645.00	9/4/2012	CHNTLY AHQ



Requisition/PO Xref Report

The **Requisition/PO Xref Report** provides:

- Cross reference between requisitions and associated POs
- Information about requisitions and the POs that have been created from them

You can navigate to this report using the following path:

Main Menu > Purchasing > Purchase Orders > Reports > Requisition/PO Xref

A **PO to Requisition Xref** run control page will appear. You will need to add, or find an existing, run control and then enter the report parameters, and click on **Run**. The **Process Scheduler Request** page will appear and you will select the Crystal report option and click **OK** to kick off the report.

Process Scheduler Request

User ID: YANI.HO Run Control ID: Print_PO

Server Name: Run Date: 06/02/2016

Recurrence: Run Time: 1:23:16PM

Time Zone:

Process List					
Select	Description	Process Name	Process Type	*Type	*Format
<input type="checkbox"/>	PO to Requisition XREF Report	POX4100	XML Publisher	Web	PDF
<input checked="" type="checkbox"/>	PO to Requisition XREF Report	POY4100-	Crystal	Web	PDF

ORACLE Report ID: POY4100 PeopleSoft Purchasing Page No. 1
 User ID: PPS_MIKE.HALL PO TO REQUISITION XREF REPORT Run Date 11/27/2012
 Run Control: PO_DEATAIL Run Time 4:47:12PM

PO Dates Included: 8/1/2012 Thru: 9/30/2012
 Business Unit: 50100

Contract ID	Ref	Vendor ID	Ln/Sch/Dat	Item ID	Description	Order Qty	UOM	Cur	Price	ID	Requisition Ln/Sch/Dat	Quantity	UOM
PO_ID: 0001011863 000000000000032731		PO Date: 9/10/2012 17 000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	48,000.00	GLL	USD	1.84	0002012360	1 1 1	48,000.00	GLL
PO_ID: 0001021221 000000000000032731		PO Date: 8/2/2012 105 000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	48,000.00	GLL	USD	1.89	0002018338	1 1 1	48,000.00	GLL
PO_ID: 0001031774 000000000000032731		PO Date: 9/3/2012 178 000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	23,336.00	GLL	USD	1.92	0002024210	1 1 1	24,000.00	GLL
PO_ID: 0001033700 000000000000032612		PO Date: 8/1/2012 43 0000037282	1 1 1	7503001000	CONCRETE, PRECAST	24.00	EA	USD	1,713.04	0002025311	1 1 1	24.00	EA
000000000000032612		PO Date: 8/1/2012 44 0000000000	2 1 1	1550801000	BRIDGES, PREFABRICATED (NOT INSTALLED) BRIDGES, PREFABRICATED (NOT INSTALLED)	1.00	EA	USD	500.00	0002025311	2 1 1	1.00	EA
PO_ID: 0001033701 000000000000031296		PO Date: 8/1/2012 7 000004591	1 1 1	9137169003	ASSEMBLE/DISASSEMBLE LANE CLOS	1.00	EA	USD	850.00	0002025268	1 1 1	1.00	EA
PO_ID: 0001033816 000000000000031554		PO Date: 8/1/2012 25 000000942	1 1 1	5500416700	REFLECTORIZED GLASS BEADS, CAR	40,000.00	LBR	USD	0.29	0002025561	1 1 1	40,000.00	LBR
PO_ID: 0001033817 000000000000032731		PO Date: 8/1/2012 107 000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	5,700.00	GLL	USD	1.89	0002025436	1 1 1	5,700.00	GLL
PO_ID: 0001033824		PO Date: 8/1/2012											

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Requisition/PO Xref Report (continued)

ORACLE		Report ID: POY4100	PeopleSoft Purchasing						Page No. 1					
		User ID: PPS_MIKE.HALL	PO TO REQUISITION XREF REPORT						Run Date 11/27/2012					
		Run Control: PO_DEATAIL							Run Time 4:47:12PM					
PO Dates Included: 8/1/2012		Thru: 9/30/2012												
Business Unit: 50100														
Contract ID	Rel	Vendor ID	Ln/Sch/Det	Item ID	Description	Order Qty	UOM	Cur	Price	Requisition			Quantity	UOM
										ID	Ln/Sch/Det			
PO_ID: 0001011863 000000000000032731		PO Date: 9/10/2012 17 0000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	48,000.00	GLL	USD	1.84	0002012390	1 1 1	48,000.00	GLL	
PO_ID: 0001021221 000000000000032731		PO Date: 8/2/2012 105 0000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	48,000.00	GLL	USD	1.89	0002018338	1 1 1	48,000.00	GLL	
PO_ID: 0001031774 000000000000032731		PO Date: 9/3/2012 176 0000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	23,336.00	GLL	USD	1.92	0002024210	1 1 1	24,000.00	GLL	
PO_ID: 0001033700 000000000000032612		PO Date: 8/1/2012 43 0000037282	1 1 1	7503001000	CONCRETE, PRECAST CONCRETE, PRECAST BRIDGES,	24.00	EA	USD	1,713.04	0002025311	1 1 1	24.00	EA	
000000000000032612		44	2 1 1	1550801000	PREFABRICATED (NOT INSTALLED) BRIDGES, PREFABRICATED (NOT INSTALLED)	1.00	EA	USD	500.00	0002025311	2 1 1	1.00	EA	
PO_ID: 0001033701 000000000000031298		PO Date: 8/1/2012 7 0000034591	1 1 1	9137199063	ASSEMBLE/DISASSEMB LE LANE CLOS	1.00	EA	USD	850.00	0002025268	1 1 1	1.00	EA	
PO_ID: 0001033816 000000000000031554		PO Date: 8/1/2012 25 0000009942	1 1 1	5500416700	REFLECTORIZED GLASS BEADS, CAR	40,000.00	LBR	USD	0.29	0002025581	1 1 1	40,000.00	LBR	
PO_ID: 0001033817 000000000000032731		PO Date: 8/1/2012 197 0000002181	1 1 1	7451220550	ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2	5,700.00	GLL	USD	1.89	0002025436	1 1 1	5,700.00	GLL	
PO_ID: 0001033824		PO Date: 8/1/2012												



PO Balance Detail Report

The **PO Balance Detail Report** provides a current balance for open Purchase Orders (PO), as well as detailed data related to the PO in reference to receivers against the PO and vouchers against the receiver. This report is used by Buyers and Requestors to view the outstanding PO balance, the received amount, and vouchers against the PO.

You can navigate to this report using the following path:

Main Menu > Purchasing > Purchase Orders > Reports > PO Balance Detail Report

A **PO Balance Detail Report** run control page will appear. You will need to add, or find an existing, run control, enter the report parameters and click on **Run**. The **Process Scheduler Request** page will appear and you will select how you want the list run and click **OK** to kick off the report.

Favorites | Main Menu > Purchasing > Purchase Orders > Reports > PO Balance Detail Report

PO Balance Detail Report

PO Balance Detail Report

Run Control ID: FundingSource [Report Manager](#) [Process Monitor](#) [Run](#)

Report Request Parameters

*Business Unit

PO Number Contract ID

Vendor ID Buyer

PO Status From Date To Date



PO Balance Detail Report (continued)

	Commonwealth of Virginia PO BALANCE DETAIL REPORT	Run Date: 06/08/2016 Run Time: 04:27 00
Report ID: RPR003		

Business Unit: 50100 Page No. 1 of 17165
 PO ID: All
 Contract ID: All
 PO Status: All
 Vendor ID: All
 Buyer ID: All
 From Date: 01/01/2016
 To Date: 06/08/2016

<u>Buyer Name</u>	<u>Vendor Name</u>	<u>Vendor ID</u>	<u>Vendor Location</u>
AMANDA.YOWELL	MCCLANAHAN-001	0000027648	MAIN

<u>PO ID</u>	<u>PO Date</u>	<u>Change Order Number</u>	<u>PO Receive Status</u>	<u>Match Control ID</u>	<u>PO Reference</u>
0001138890	05/17/2016	0	R	STANDARD	CAMERA FOR PUBLIC AFFAIRS

<u>PO Line Number</u>	<u>Item ID</u>	<u>Item Description</u>	<u>Contract ID</u>	<u>PO QTY</u>	<u>PO Price</u>	<u>PO Line Merchandise Amount</u>
1	6553001000	CAMERAS, MOVIE, AND ACCESSORIES CAMERAS, MOVIE, AND ACCESSORIES		1.00	\$ 239.00	\$ 239.00

<u>Receiver ID</u>	<u>Receiver Line Number</u>	<u>Receiver Shipping Sequence</u>		<u>Receipt Quantity</u>	<u>Receiver Schedule Merchandise Amount</u>
0001867068	1	1		1.00	\$ 239.00
				Total Received	\$ 239.00
				Un-Received PO Line Quantity	\$ 0.00

<u>Voucher ID</u>	<u>Voucher Line Number</u>	<u>Receiver ID</u>	<u>Receiver Line Number</u>	<u>Voucher Quantity</u>	<u>Voucher Price</u>	<u>Voucher Merchandise Amount</u>
00610405	1	0001867068	1	1.00	\$ 239.00	\$ 239.00
				Total Vouchered	1.00	\$ 239.00
				Open Receiver Quantity	0.00	\$ 0.00

	Total PO Line Amount	\$	239.00
	Total PO Line Vouchered Amount	\$	239.00
	Total Un-Received PO Line Amt	\$	0.00

PO Line

PO Line



Lesson 6: Summary

In this lesson, you learned:

- The Buyer has numerous reports that can be run for POs, to include:
 - PO Dispatch/Print Report
 - Expediting Report
 - PO Listings Report
 - Status Listings Report
 - Requisition/PO Xref Report
 - PO Balance Detail Report



Lesson 6: Processing Purchase Orders Hands-On Practice

This lesson includes practice that will reinforce the lessons learned today. Your instructor will provide direction regarding specific activities that are part of this lesson. Please ask your instructor if you have any questions.





Course Summary

In this course, you learned how to:

- Describe Purchase Order Concepts, Processes, Integration, and Interfaces
- Create Purchase Orders
- Review and Manage Purchase Orders
- Cancel Purchase Orders
- Create a Purchase Order Change Order
- Reconcile / Close POs – 3 Way Match
- Explain and Describe Key Reports and Online Inquires Related to Purchase Orders



Course Evaluation

Congratulations! You successfully completed the **501 PR344: Processing Purchase Orders** course. Please use the evaluation link to assess this course.





Appendix

- Key Terms
- Flowchart Key



Key Terms

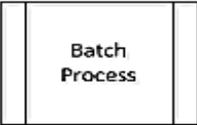
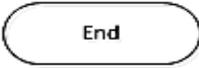
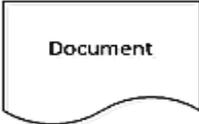
Change Order: A change order is created when you make a change to a PO that affects the **Quantity, Price, or Ship To** fields or when a **Line** is added.

Matching: Matching purchasing documents for key values lends assurance to the validity and correctness of transactions and cash payments. The matching process compares vouchers with POs and receiving documents. This helps ensure that you pay for only the goods and services that you order and receive.

Purchase Order: Purchase Orders (POs) are commitments from an agency to suppliers to purchase goods or services from that supplier. The purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, is listed on the document and is part of the contractual nature of the PO.



Flowchart Key

Flowchart Key			
	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is performed manually.		Depicts a document of any kind, either electronic or had copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an On-Page or Intra Process Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.