



501 PR344

Processing Purchase Orders

Instructor Led Training



Welcome to Cardinal Training

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

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Learning.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



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



Agenda

1

Understand Purchase Orders

2

Process Purchase Orders

3

Maintain and Modify (Change Orders) Purchase Orders

4

Reconcile/Close a PO – 3 Way Match

5

Review Purchase Order Information, History, and Activities



Lesson 1: Introduction

1

Understand 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

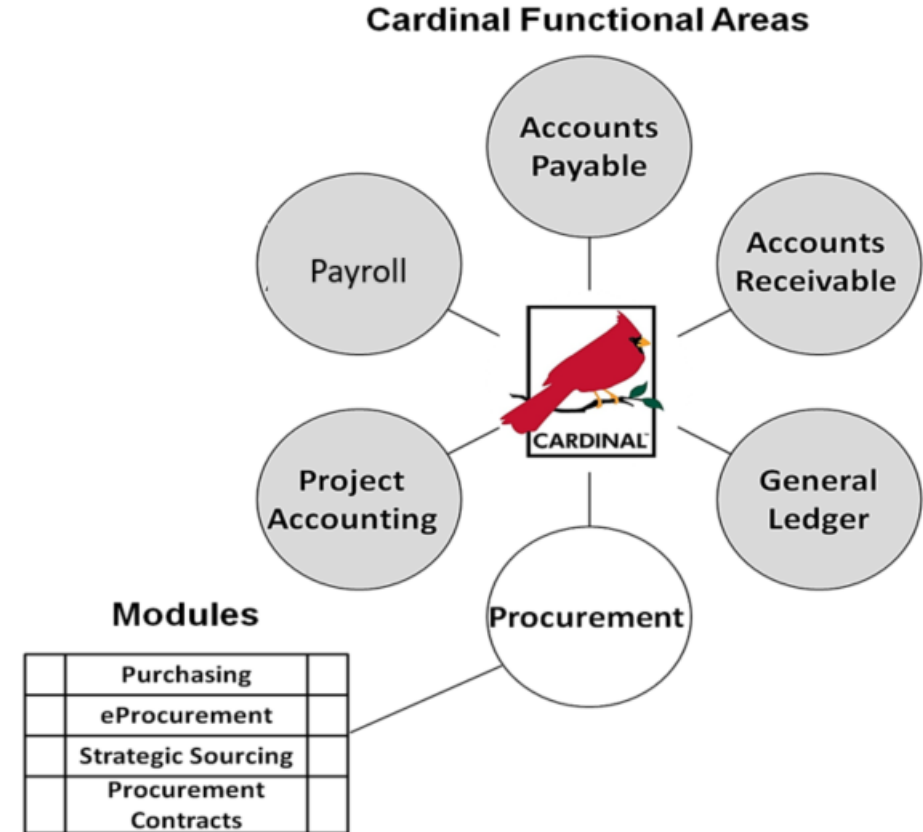
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

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.





Key Concepts

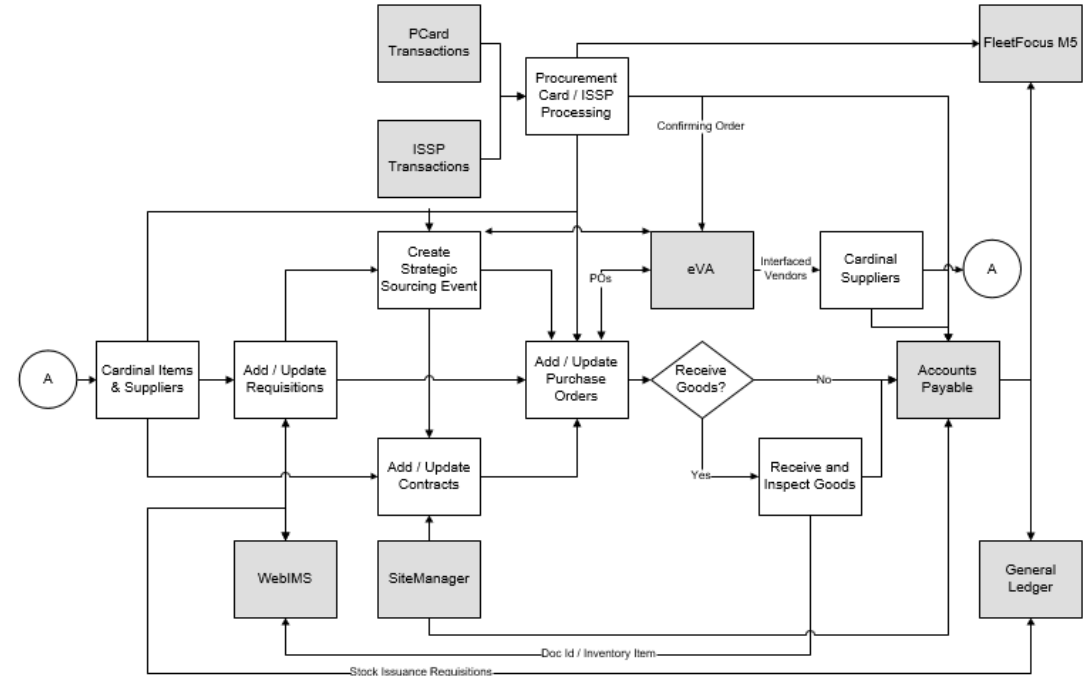
- Cardinal interfaces with external systems (eVA, SiteManager, etc.) daily, which eliminates duplicate entries in multiple systems.
- The Statewide procurement supplier database is updated by eVA daily and maintained by the Commonwealth Supplier Group (CVG). It is shared with all agencies. Fiscal suppliers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



Procurement Process Overview

There are seven key processes in procurement:

- Add/Update Requisitions
- Create Strategic Sourcing Events
- Add/Update Contracts
- Add/Update Purchase Orders
- Receive/Inspect Goods
- Procurement Card Processing
- Integrated Supply Services Program (ISSP) Processing





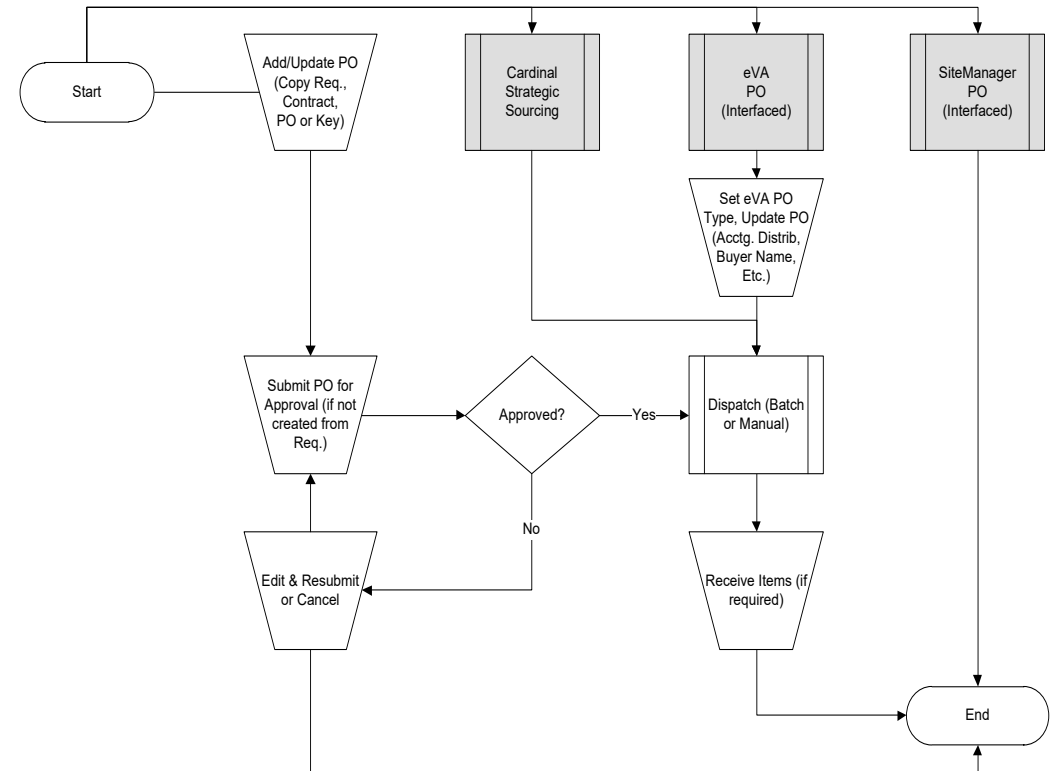
Purchase Order Process

Using the Purchasing module, a PO can be created online that converts requests for goods and/or services into POs.

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

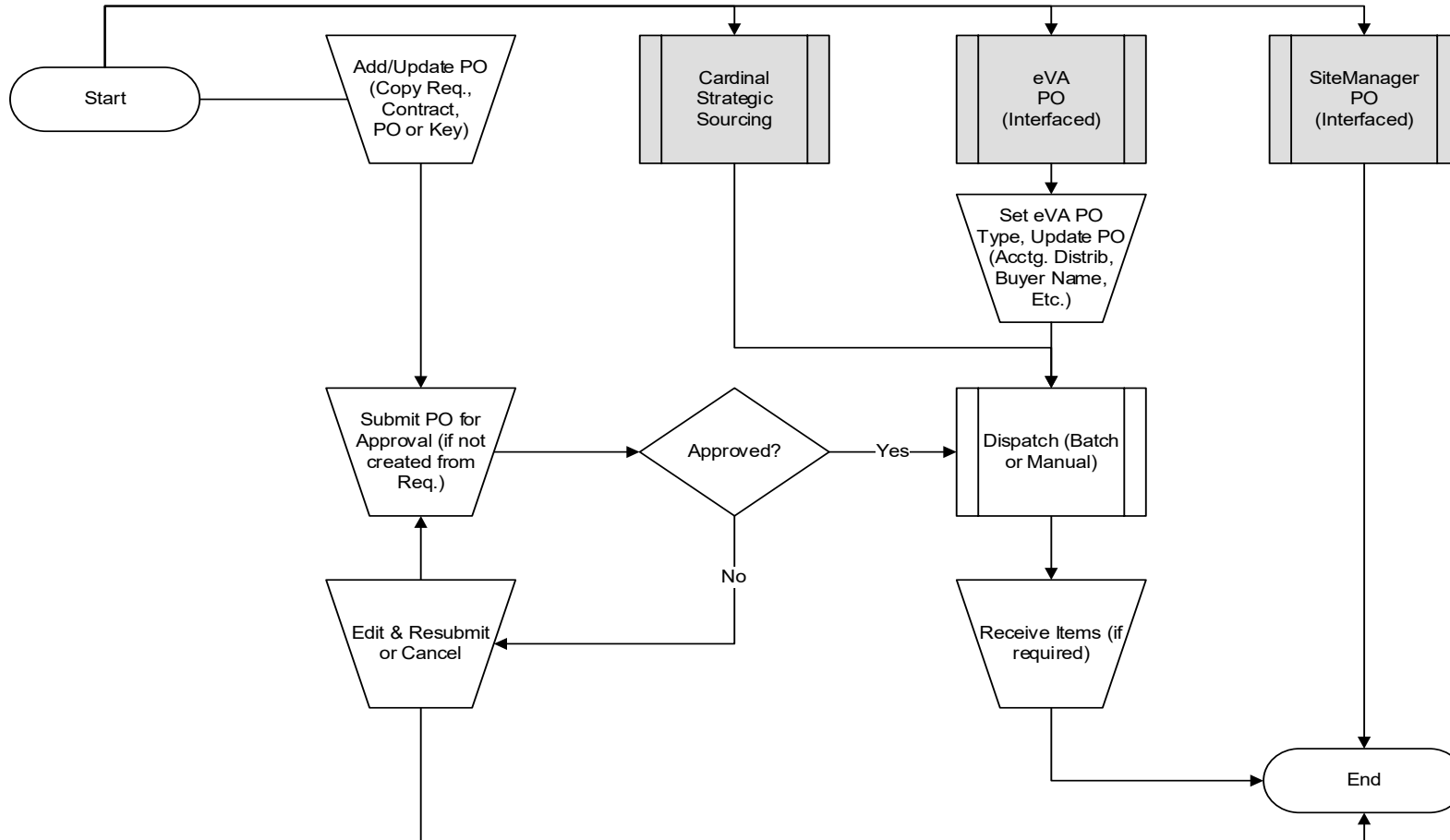
- PO key components include a header, lines, schedules, and distributions.
- A PO is identified by an ID that is unique within a purchasing business unit.
- Cardinal automatically generates a PO ID number.

Note: POs keyed into Cardinal, Strategic Sourcing POs, and SiteManager POs are interfaced to eVA after being dispatched unless the suppliers preferred order method is set to Exception.





Purchase Order Process (continued)



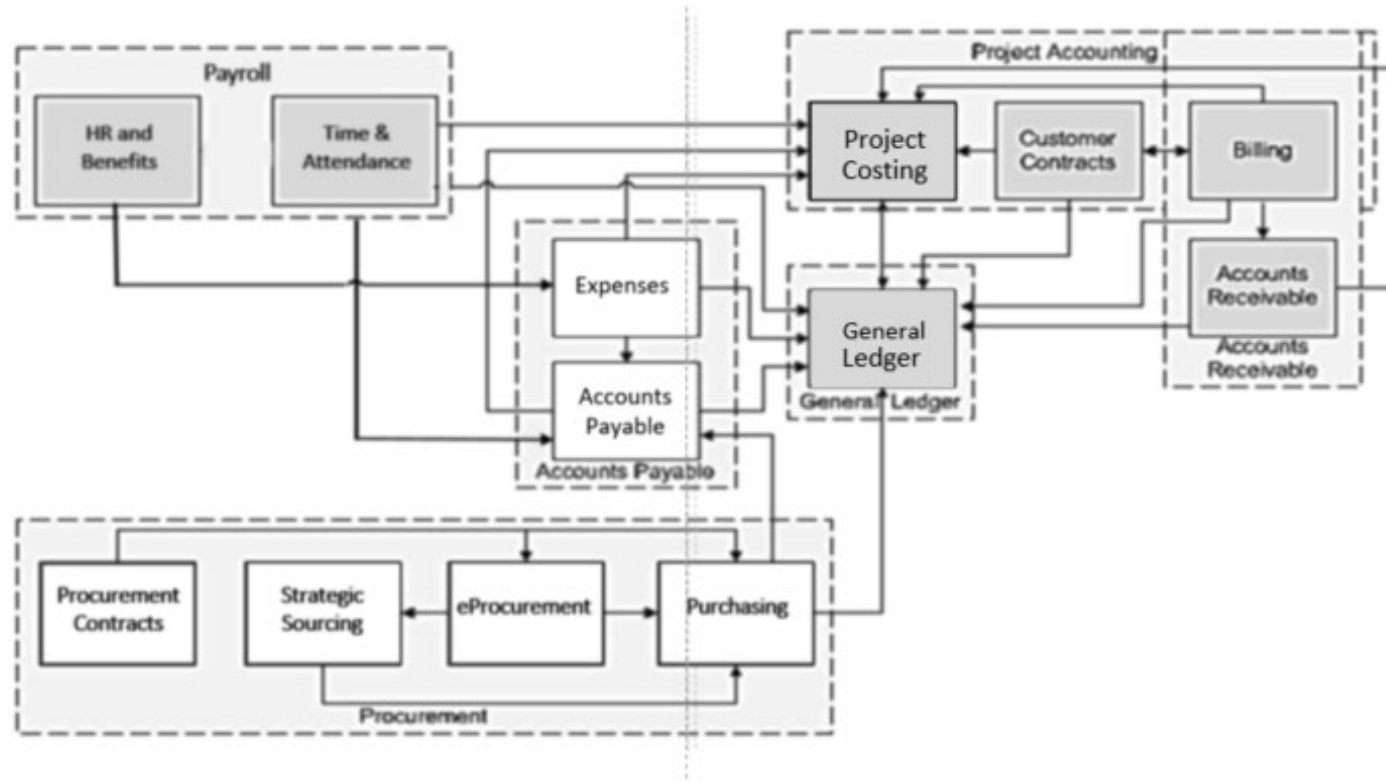
Note: POs keyed into Cardinal, Strategic Sourcing POs, and SiteManager POs are interfaced to eVA after being dispatched unless the suppliers preferred order method is set to Exception.



Integration with Accounts Payable

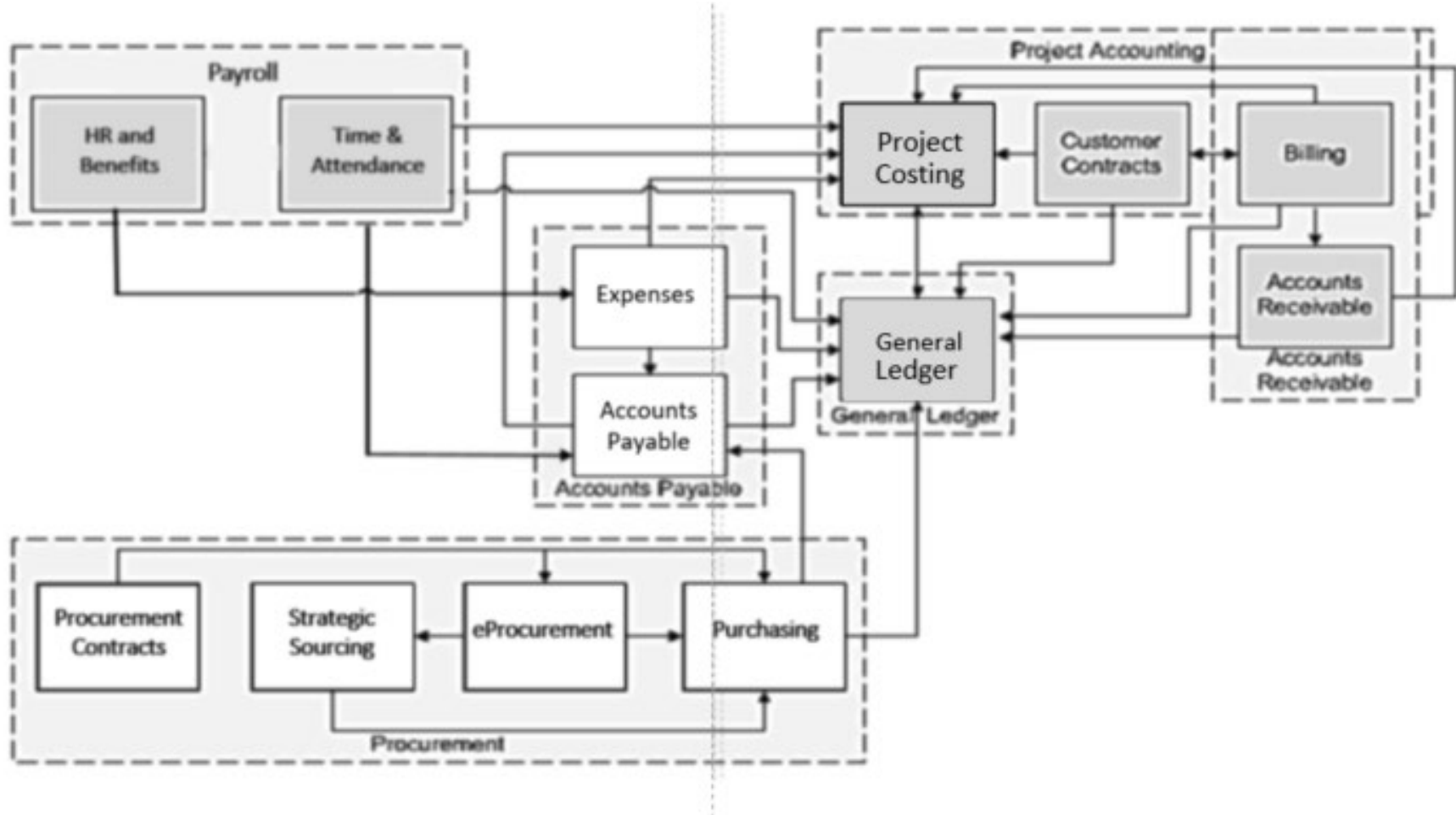
Processing a PO involves the Accounts Payable module in the matching process. Matching ensures that payment is made for what was ordered and received by comparing vouchers with POs and receiving documents.

- **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)

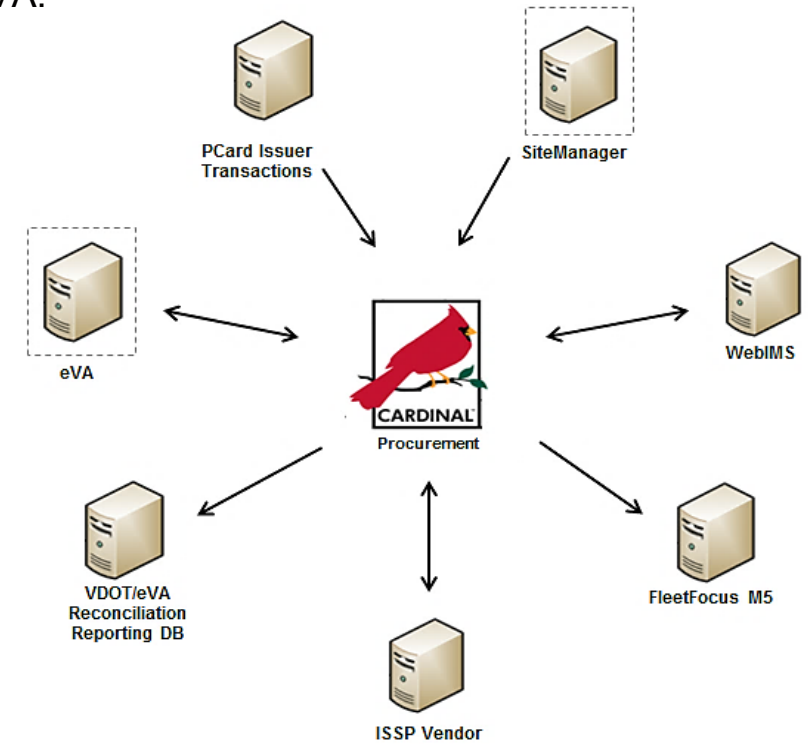




Interfaces with eVA and SiteManager

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 in Cardinal are exported to eVA. This interface does not send attachments.
- When required, a designated Administrative Services Division (ASD) staff member uploads 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. Read the question and make note of your answer below.



1. _____ is a commitment from an agency to suppliers to purchase goods or services from that supplier.



2. _____ are the four components of a purchase order.



3. Who can create a PO?



Lesson 1: Checkpoint (continued)



4. Who can create a requisition?



Lesson 1: Summary

1

Understand Purchase Orders

In this lesson, you learned:

- 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: Introduction

2

Processing Purchase Orders

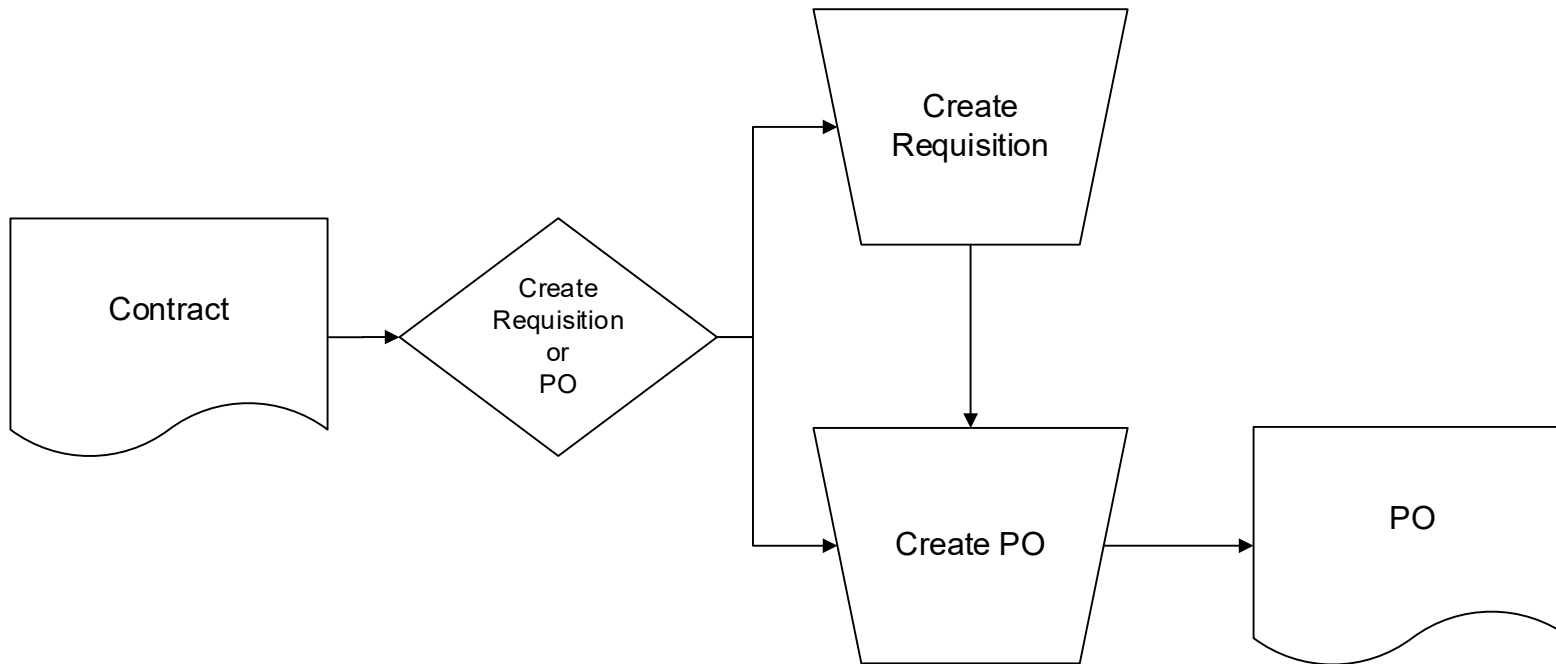
This lesson covers the following topics:

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



Purchase Order Basics

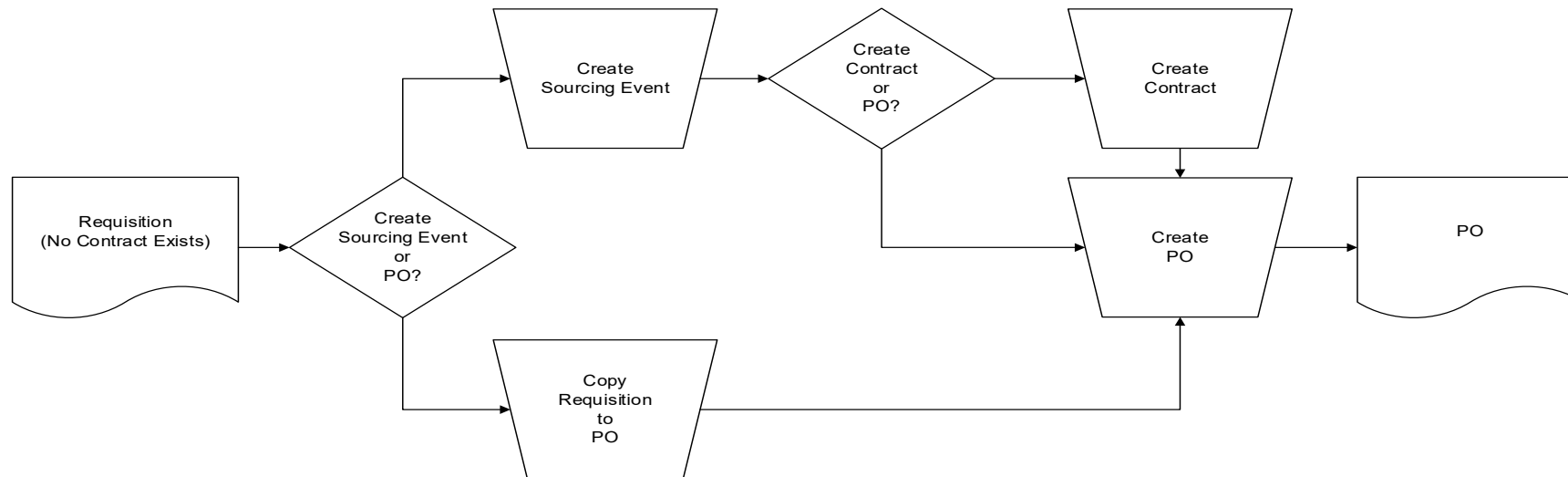
- Purchase Orders (POs) are commitments from an organization to suppliers to purchase goods or services from that supplier. The purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, is listed on the document and is part of the contractual 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. A purchase order can be created 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
- Copying 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.
 - Purchase order - Copy an existing PO to order the same items.
 - Contract - Copy from an existing contract to save time on data entry. Multiple contracts can be copied into an existing PO.
- Award a Strategic Sourcing event to a PO (i.e. Invitation For Bid).

Navigate to create a PO using the following path:

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

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

Purchase Order

Find an Existing Value Add a New Value

Business Unit 50100 🔍
PO ID NEXT

Add

Find an Existing Value | Add a New Value



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

Receive by Amount

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

For more detailed information about creating purchase orders, see the job aid entitled **501 PR344: Purchase Orders** located on the Cardinal website in **Job Aids** under **Learning**.



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 the 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](#)

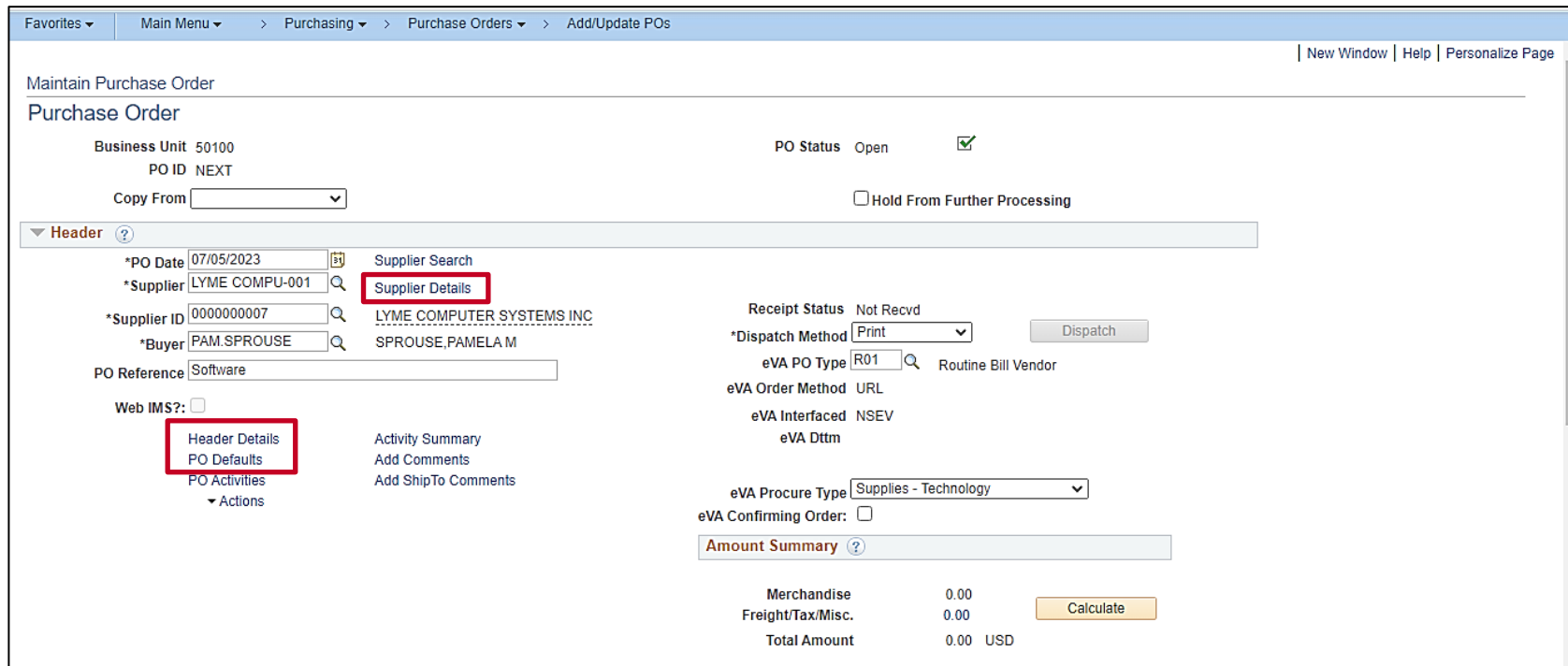
Creating Purchase Orders (continued)

Purchase Order (PO):

A Purchase Order 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**.

Options include 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.



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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open

PO ID NEXT

Copy From

Hold From Further Processing

▼ Header ?

*PO Date 07/05/2023 Supplier Search

*Supplier LYME COMPU-001 **Supplier Details**

*Supplier ID 000000007 LYME COMPUTER SYSTEMS INC

*Buyer PAM.SPROUSE SPROUSE,PAMELA M

PO Reference Software

Web IMS?:

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

▼ Actions

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced NSEV

eVA Dttm

eVA Procure Type Supplies - Technology

eVA Confirming Order:

Amount Summary ?

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



Creating Purchase Orders (continued)

Navigation: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs

Web IMS?:

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

eVA Order Method: URL
eVA Interfaced: NSEV
eVA Dttm

eVA Procure Type:

eVA Confirming Order:

Amount Summary ?

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

Add Items From ?

Catalog | Item Search
Purchasing Kit

Lines ? Personalize | Find | View All | [Print] [Grid] First 1 of 1 Last

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

View Approvals *Go to



Creating Purchase Orders: Supplier Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Supplier Details** hyperlink displays the **Maintain Purchase Order – Supplier Details** pop-up window. This window allows viewing or editing 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.

PO Supplier Information

Maintain Purchase Order

Supplier Details -- S B COX Incorporated

Business Unit	50100	PO ID	0001195122	Supplier	S B COX IN-001
*Location	<input type="text" value="MAIN"/>			Supplier Information	
*Address	<input type="text" value="4"/>	<input type="button" value="Show Address Details"/>	<input type="text" value="30"/> Net 30 Basis Date Type <input type="text" value="Inv Date"/>		
Contact	<input type="text"/>	<input type="button" value="Show Contact Details"/>			
Salesperson	<input type="text"/>	<input type="button" value="Show Salesperson Details"/>			

Supplier Details Message

Country	USA United States	Prefix	
Address 1	P.O. BOX 7737	Fax	260/332-7665
Address 2		Prefix	1
eVA VLIN	VA10053587	Phone	550/276-9275
eVA Address ID	EVAAD74524		
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 displays the **PO Header Details** pop-up window. This window displays the **Billing Location** which defaulted based on preconfigured Buyer preferences. View or edit the location as necessary.

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

PO Header Details	
PO Details	
Supplier S B COX IN-001	PO Date 04/16/2019
*PO Type GEN	<input checked="" type="checkbox"/> Tax Exempt
*Billing Location CHSTFD R Billing Address	ID 546001730
Origin ONL Online	Letter of Credit ID
<input type="checkbox"/> Use One Ship To	Ship To CHSTFD RES
Currency	
Currency Code USD Exchange Rate Detail	Base Currency USD
Rate Date 01/01/1901	Exchange Rate 1.00000000
Rate Type CRRNT	
Process Control Option	
<input checked="" type="checkbox"/> Dispatch	Acknowledgements required for Not required
*Method Print	
OK	Cancel Refresh



Creating Purchase Orders: PO Defaults

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **PO Defaults** hyperlink opens the **Purchase Order Defaults** pop-up window. This window displays the **Ship To** location which defaulted based on preconfigured Buyer preferences. View or edit the location as necessary.

In the **Default Options** section, a **Default** chart of accounts may be set 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.

Purchase Order Defaults	
Business Unit 50100	PO ID 0001195122
Supplier S B COX IN-001	
Default Options ?	
<input type="radio"/> 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.
<input checked="" type="radio"/> Override	If you select this option, all default values entered on this page override the default values found in the default hierarchy.
Line	
Category <input type="text"/>	Unit of Measure <input type="text"/>
Schedule	
Ship To <input type="text" value="CHSTFD RES"/> Chesterfield Residency	Ultimate Use Code <input type="text"/>
Due Date <input type="text"/>	Original Promise Date <input type="text"/>
Ship Via <input type="text" value="COMMON"/>	Freight Terms Code <input type="text" value="FOB DEST"/>
Arbitration <input type="text"/>	Freight Charge Method <input type="text"/>
*Distribute By <input type="text" value="Quantity"/>	One Time Address



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 opens the **Details for Line** pop-up window.

This window shows all information related to the 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.

Details for Line 1

PO ID 0001195122 Supplier S B COX IN-001
Line 1 Item ID 9884650800 LANDFILL SERVICES LANDFILL SER

Line Details

Category 9884650 Line Status Approved ✖ ▲
Description LANDFILL SERVICES Backorder Status Not Backordered

Category ID 27945 **Amount Summary**
Amount to Receive 176.000 USD Merchandise Amount 5,000.00 USD
Quantity to Receive 7.0400 Doc. Base Amt 5,000.00 USD

Item Availability

Transaction Item Description
LANDFILL SERVICES LANDFILL SERVICES, TON

Preferred Language Item Description
LANDFILL SERVICES LANDFILL SERVICES, TON

Expand All Collapse All

Item Information

Supplier's Catalog Device Tracking
Supplier Item ID
Manufacturer ID

Description
Manufacturer's Item ID
UPN Type Withholding
UPN ID Withholding Code

Replenish Code Standard

Attributes

Physical Nature
*Price Qty
*Price Date
 Amount Only



Creating Purchase Orders: Line Details (continued)

Details for Line 1

PO ID 0001195122 Supplier S B COX IN-001
Line 1 Item ID 9884650800 LANDFILL SERVICES LANDFILL SER

Line Details

Category 9884650 Line Status Approved ✖ ▲
Description LANDFILL SERVICES Backorder Status Not Backordered

Category ID 27945

Amount Summary	
Amount to Receive 176.000 USD	Merchandise Amount 5,000.00 USD
Quantity to Receive 7.0400	Doc. Base Amt 5,000.00 USD

Item Availability

Transaction Item Description
LANDFILL SERVICES LANDFILL SERVICES, TON

Preferred Language Item Description
LANDFILL SERVICES LANDFILL SERVICES, TON

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

Item Information

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

Attributes

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



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 are displayed.

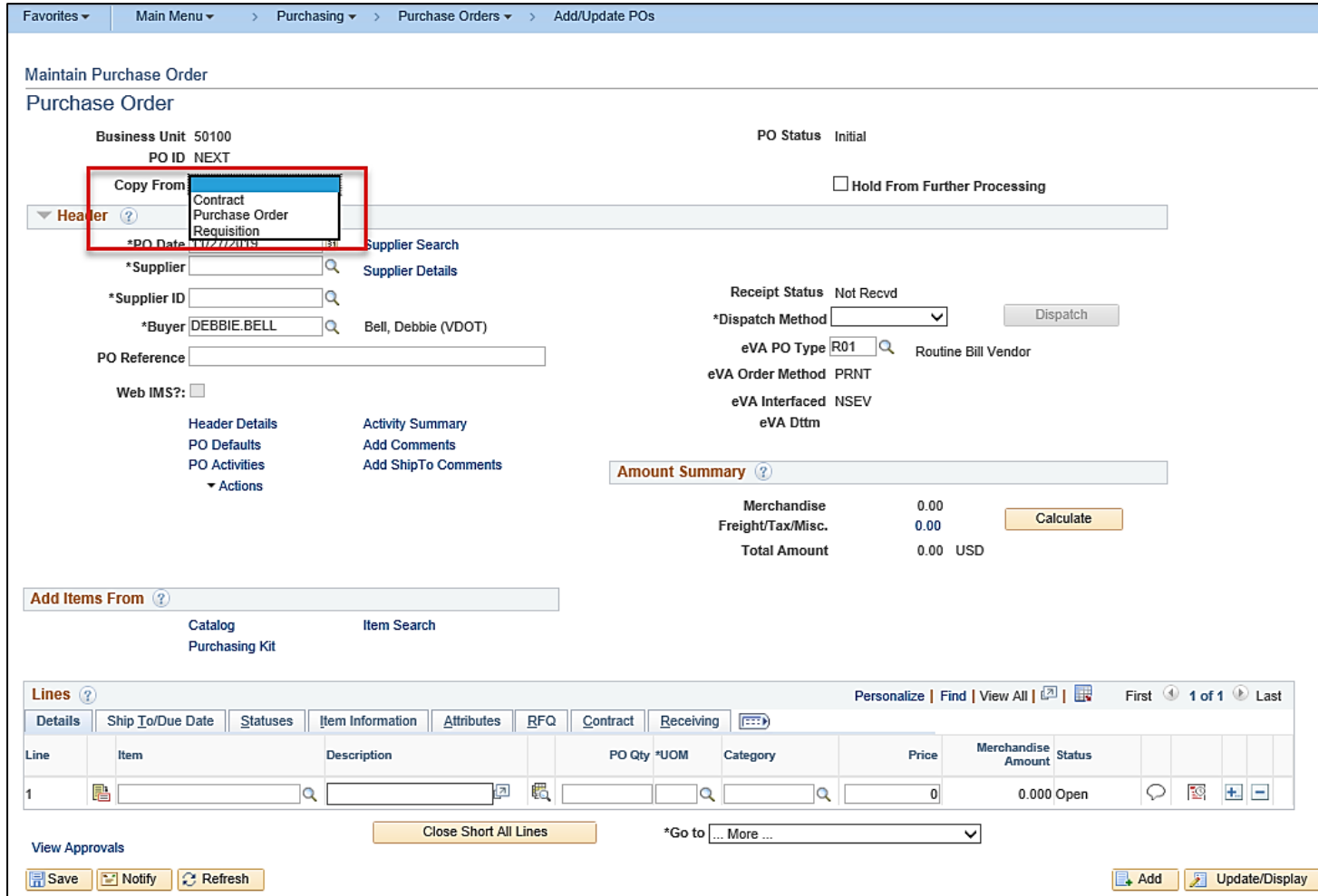
The screenshot displays a web-based form for maintaining purchase order line details. The form is organized into several sections, each with a dropdown arrow on the left:

- Attributes:** Contains dropdowns for Physical Nature (set to Services), *Price Qty (set to Line Quantity), and *Price Date (set to Due). There is also a checkbox for Amount Only.
- RFQ:** A section header with no visible data.
- Contract:** Contains fields for Contract SetID (STATE), Contract ID (0000000000000000000045185), Contract Version (1), Contract Line (3), Category Line Number, Group ID (LOT2), and Milestone Line (Release 1). A "GPO Contract" label is present. A "Contract Details" link is also visible.
- Receiving:** Contains a dropdown for *Receiving Required (set to Required) and a checkbox for Close Short.

At the bottom of the form, there are three buttons: OK, Cancel, and Refresh.

Creating Purchase Orders: Copy From

From the **Maintain Purchase Order – Purchase Order** page, 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 Hold From Further Processing

Copy From (dropdown menu): Contract, Purchase Order, Requisition

Header ?

*PO Date 11/27/2015 Supplier Search
*Supplier Supplier Details
*Supplier ID Supplier Details
*Buyer DEBBIE.BELL Bell, Debbie (VDOT)
PO Reference
Web IMS?:

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

Amount Summary ?

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

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving													
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status												
1						0	0.000	Open												

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

Save Notify Refresh Add Update/Display



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, copy the entire contract. For more detailed information about copying a single line from a contract, see the job aid entitled **501 PR344: Purchase Orders** located on the Cardinal website in **Job Aids** under **Learning**.
- When copying a line from a contract, note that the contract selection displays on one tab. After completing the copy enter the **Contract ID** on the **Maintain Purchase Order – Purchase Order** page in the **Lines** section, **Contract** tab, to associate it to the contract.

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release	Milestone Line	GPO ID	GPO Contract
1			STATE								



Creating Purchase Orders: Copy From (continued)

After selecting the type of document to be copied from, a search page appears. The page will be based on the type of document to be copied.

The screenshot displays three overlapping windows from a web application:

- Top Window:** "Maintain Purchase Order" with the option "Copy Purchase Order from Requisition" selected.
- Middle Window:** "Copy Purchase Order from Purchase Order".
- Bottom Window:** "Copy Purchase Order from Contract". This window contains the following sections:
 - Contract Selection Criteria:** Includes fields for "Contract SetID" (STATE), "Contract ID", "Supplier" (S B COX IN-001), "Supplier ID" (0000032186), and "Master Contract". There is also a checkbox for "Allow Open Item Contract Only".
 - Select Contract:** A table with columns: Select, SetID, Contract, Description, Supplier ID, and Begin Date. The table is currently empty.
 - Buttons:** "Search", "OK", "Cancel", and "Refresh".



Creating Purchase Orders: Copy From (continued)

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

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

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ **Requisition Selection Criteria**

Business Unit Buyer

Supplier ID Origin

Category Max Rows

Requisition ID Include Reqs With No Supplier

Requisition Name Include Inventory Items

Contract ID Exclude Auto Source Item

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

Sourcing	Requisitions	Contract Information	Item Substitution									
Select	Catalog Item	*Supplier	PO Qty	PO UOM	Item	Description	Req ID	Line	Procurement Card	Calc Price	Schedule Split	
<input type="checkbox"/>		<input type="text"/>	114.0000	TNE		BITUMINOUS ASPHALT TYPE SM 9.5	0002270245	1		N		
<input type="checkbox"/>		<input type="text"/>	3520.0000	YDK		FLEXIBLE PAVEMENT PLANNING (MI	0002270245	2		N		

Select All Clear All



Creating Purchase Orders: Copy From (continued)

Click the **Search** button and the items matching 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 to be copied. Multiple items, such as multiple lines can be copied, if desired.

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

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

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit Buyer

Supplier ID Origin

Category Max Rows

Requisition ID Include Reqs With No Supplier

Requisition Name Include Inventory Items

Contract ID Exclude Auto Source Item

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

Select	Catalog Item	*Supplier	PO Qty	PO UOM	Item	Description	Req ID	Line	Procurement Card	Calc Price	Schedule Split
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	114.0000	TNE		BITUMINOUS ASPHALT TYPE SM 9.5	0002270245	1		N	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	3520.0000	YDK		FLEXIBLE PAVEMENT PLANNING (MI	0002270245	2		N	

Select All Clear All



Creating Purchase Orders: Copy From (continued)

The **Purchase Order** page displays with the item(s) selected.

Navigation: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs

Web IMS?:

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

eVA Order method: URL
eVA Interfaced: NSEV
eVA Dttm

eVA Procure Type:
eVA Confirming Order:

Amount Summary ?

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

Add Items From ?

Catalog | Item Search
Purchasing Kit

Lines ? Personalize | Find | View All | [Print] [Grid] First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text" value="0051432112"/>	<input type="text" value="DISCS, ABRASIVE 7"/>		EA	<input type="text" value="0051432"/>	0	0.000	Open			

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



Creating Purchase Orders: Copy From (continued)

After copying the existing document information into the PO, some information may need to be added or changed, 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 updating 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, if needed, additional line items may be associated with the PO.

To Add New Lines

- The **Lines** section contains links that allow selection of items for the PO. 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. Complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

The screenshot shows the 'Add/Update POs' interface. At the top, there are navigation tabs: 'Web IMS?', 'Header Details', 'Activity Summary', 'PO Defaults', 'Add Comments', 'PO Activities', 'Add ShipTo Comments', and 'Actions'. Below these, there are fields for 'eVA Order method URL', 'eVA Interfaced NSEV', and 'eVA Dttm'. A dropdown menu for 'eVA Procure Type' is set to 'Supplies - Technology'. There is a checkbox for 'eVA Confirming Order:'. An 'Amount Summary' section shows 'Merchandise 0.00', 'Freight/Tax/Misc. 0.00', and 'Total Amount 0.00 USD' with a 'Calculate' button. Below this is an 'Add Items From' section with 'Catalog' and 'Purchasing Kit' options. The main 'Lines' section has a table with columns: Line, Item, Description, PO Qty, *UOM, Category, Price, Merchandise Amount, and Status. The table contains one row with Line 1, Item 0051432112, Description DISCS, ABRASIVE 7, PO Qty, *UOM EA, Category 0051432, Price, Merchandise Amount 0.000, and Status Open. There are search icons and a 'Close Short All Lines' button at the bottom of the table.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	0051432112	DISCS, ABRASIVE 7		EA	0051432		0.000	Open



Creating Purchase Orders: Items (continued)

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 **Distributions/ChartFields** icon.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		BITUMINOUS	114.0000	TNE	5503376	387.20000	44,140.80	Open

Close Short All Lines

*Go to ... More ...

Save Notify Refresh Add Update/Display

Unit 50100 Supplier LL CARTER -003 PO Status Initial
PO ID NEXT PO Date 11/08/2019

Return to Main Page

Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Use Tax	Distributions/ChartFields
1		11/08/2019	SALEM MAN		114.0000	387.20000	44,140.80	Active				

Add ShipTo Comments

Save Notify Refresh Add Update/Display



Creating Purchase Orders - Items (continued)

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

PO Reference:

Web IMS?:

Header Details
PO Defaults
PO Activities
▼ Actions

Activity Summary
Add Comments
Add ShipTo Comments

eVA Order Method: URL
eVA Interfaced: NSEV
eVA Dttm

eVA Procure Type:

eVA Confirming Order:

Amount Summary ?

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

Add Items From ?

Catalog
Purchasing Kit

Item Search

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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving				
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text" value="0051432112"/>	<input type="text" value="DISCS, ABRASIVE 7"/>	<input type="text" value="10"/>	<input type="text" value="EA"/>	<input type="text" value="0051432"/>	<input type="text" value="2500.00"/>	<input type="text" value="0.000"/>	Open	<input type="text"/>	<input type="text"/>	

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.

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003
PO ID NEXT Item **BITUMINOUS ASPHALT TYPE SM 9.5**
Line 1
Schedule 1 Status Active

*Distribute By Schedule Qty 114.0000
Merchandise Amount 44,140.80 USD
Doc. Base Amount 44,140.80 USD

SpeedChart **Multi-SpeedCharts**

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

Chartfields	Details/Tax	Asset Information	Req Detail	Statuses							
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	114.0000	44,140.80	USD	50100		5012550	04100	604001	12096

OK Cancel Refresh



Creating Purchase Orders: Distributions (continued)

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003
PO ID NEXT Item BITUMINOUS ASPHALT TYPE SM 9.5
Line 1
Schedule 1 Status Active

*Distribute By

SpeedChart

Schedule Qty 114.0000
Merchandise Amount 44,140.80 USD
Doc. Base Amount 44,140.80 USD

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

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	114.0000	44,140.80	USD	50100		5012550	04100	604001	12096

OK Cancel Refresh



Creating Purchase Orders: Send for Approval

After updating the fields, return to the **Maintain Purchase Order – Purchase Order** page, click **Save**, and the 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** checkmark. The checkmark will disappear and the words **Pend Appr** will appear.

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

Maintain Purchase Order
Purchase Order

Business Unit 50100 PO ID 0001201103 PO Status Open

Copy From Hold From Further Processing

▼ Header ?

*PO Date 11/08/2019 Supplier Search
*Supplier LL CARTER -003 Supplier Details
*Supplier ID 0000033093 LL Carter & Son Inc
*Buyer CAROLINE.BUMBER Bumbara, Caroline C. (VDOT)

PO Reference Stone

Web IMS?:

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

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

Amount Summary ?

Merchandise	44,140.80	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	44,140.80 USD	

PO Status Pend Appr



Simulation: Creating a Purchase Order/Ad-Hoc

You will now view a simulation that demonstrates how to **Create a Purchase Order/Ad-Hoc**.





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.

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

Purchase Order

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

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

▼ Search Criteria

Business Unit = ▾ 50100 🔍

PO ID begins with ▾ []

Purchase Order Date = ▾ []

PO Status = ▾ []

Short Supplier Name begins with ▾ [] 🔍

Supplier ID begins with ▾ [] 🔍

Supplier Name begins with ▾ [] 🔍

Buyer begins with ▾ [] 🔍

Buyer Name begins with ▾ [] 🔍

PO Type = ▾ []

Purchase Order Reference begins with ▾ []

Hold From Further Processing

Case Sensitive

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

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

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



Managing eVA Purchase Orders (continued)

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

The screenshot shows a web application interface for maintaining a purchase order. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs. The page title is "Maintain Purchase Order" and the sub-header is "Purchase Order".

Key fields and controls visible include:

- Business Unit: 50100
- PO ID: 0001143973
- Copy From: [Dropdown]
- PO Status: Dispatched (with up/down arrows and a red X icon)
- Hold From Further Processing:
- *PO Date: 08/16/2016 (with a calendar icon)
- *Supplier: VCE INC-001
- *Supplier ID: 0000054786
- *Buyer: [Text field]
- Supplier Search: [Text field]
- Supplier Details: VCE INC, Altman, Kar
- Backorder Status: Not Backordered
- Create BackOrder: [Link]
- PO Reference: [Text field]
- Web IMS?:
- Navigation links: Header Details, PO Defaults, PO Activities, Requisitions, Actions, Activity Summary, Edit Comments, Add ShipTo, Document Summary
- Summary table:

Merchandise	208.00	
Freight/Tax/Misc.	0.00	
Total Amount	208.00	USD

A modal message box is displayed with the following text:

Message

Changing Buyer will change the default values ShipTo ID to NOVA TFO Dept ID to 19011 Location to NOVA TFO 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.

Buttons: OK, Cancel



Managing eVA Purchase Orders (continued)

To complete the PO, the **Buyer** must enter the accounting distribution for each line on the PO. Click the **PO Defaults** link to enter the accounting distribution for all lines. Or, 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.

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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open

PO ID NEXT

Copy From Hold From Further Processing

▼ Header ?

*PO Date 07/05/2023 Supplier Search

*Supplier LYME COMPU-001 Supplier Details

*Supplier ID 0000000007 LYME COMPUTER SYSTEMS INC

*Buyer PAM.SPROUSE SPROUSE,PAMELA M

PO Reference Software

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced NSEV

eVA Dttm

Web IMS?:

Header Details

PO Defaults

PO Activities

▼ Actions

Activity Summary

Add Comments

Add ShipTo Comments

eVA Procure Type Supplies - Technology

eVA Confirming Order:

Amount Summary ?

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



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** pop-up window. Click **OK**. The **Maintain Purchase Order - Retrofit** field changes to "all" existing PO lines/schedules/distributions..... page will open.

Purchase Order Defaults

Business Unit 50100 PO ID 0001143973 Supplier VCE INC-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 NOVA Traffic Field Ops (Ship) Ultimate Use Code

Due Date Original Promise Date

Ship Via Freight Terms Code

Arbitration Freight Charge Method

*Distribute By One Time Address

Distribution

SpeedChart

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

Chartfields Asset Information

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	<input type="text" value="100.0000"/>	<input type="text" value="50100"/>	<input type="text"/>	<input type="text" value="5013120"/>	<input type="text" value="04100"/>	<input type="text" value="699001"/>	<input type="text" value="19011"/>	<input type="text" value="11120010"/>

OK Cancel Refresh



Managing eVA Purchase Orders: Distributions

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

- Select the **Apply to All Distributions** checkbox next to all ChartField values to be 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**.

PO Default Retrofit

Maintain Purchase Order

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

Business Unit 50100 PO ID 0001143973 Supplier VCE INC-001

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

Retrofit Field Selection Personalize | Find | View All | [?] | [X] First 1-3 of 3 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Ship To	NOVA TFO	
<input type="checkbox"/>	1	Department	19011	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1	Location	NOVA TFO	<input checked="" type="checkbox"/>

Select All Clear All



Managing eVA Purchase Orders: Distributions (continued)

Once the distribution values have been added:

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

Maintain Purchase Order
Purchase Order

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

Header

*PO Date 07/05/2023 Supplier Search
*Supplier LYME COMPU-001 Supplier Details
*Supplier ID 000000007 LYME COMPUTER SYSTEMS INC
*Buyer PAM.SPROUSE SPROUSE,PAMELA M
PO Reference Software
Web IMS?:
Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions

Receipt Status Not Recvd
*Dispatch Method Print Dispatch
eVA PO Type R01 Routine Bill Vendor
eVA Order Method URL
eVA Interfaced NSEV
eVA Dttm
eVA Procure Type Supplies - Technology
eVA Confirming Order:

Amount Summary

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

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	3501001000	BANNERS, PENNANTS, AND DECORATIVE FANS, DRAPES, AND PULL DOW BANNERS, PENNANTS, AND DECORATIVE FANS, DRAPES, AND PULL DOW	2.0000	EA	3501001	96.00000	192.00	Approved				
2	9622401000	COURIER/DELIVERY SERVICES (INCLUDING AIR COURIER SERVICES) COURIER/DELIVERY SERVICES (INCLUDING AIR COURIER SERVICES)	2.0000	HUR	9622401	8.00000	16.00	Approved				

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

Save Return to Search Notify Refresh Add Update/Display



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.



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 worklists items, are sent to Supervisors as a notification that POs require 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 more detailed information about PO approvals, see the course entitled **501 PR343: Procurement Approvals** located on the Cardinal website in **Course Materials** under **Learning**.

Purchase Order Approval

Business Unit 50100
PO ID 0001143552
PO Total 3,123.75 USD
Supplier ID 0000033093 LL Carter & Son Inc
Buyer GEORGE.MASON
PO Reference Stone

PO Status Pend Appr
PO Date 01/07/2017

Justification No justification entered by buyer.

[Edit PO](#)

Review Lines

Line Details Personalize | Find | View All | First 1 of 1 Last

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	Original Substituted Item	Description
<input type="checkbox"/>	1	STONE NO. 1, STONE	125.0000	LTN	24.95000	3,123.75	USD		

Select All Clear All [View Lines Details](#)

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0001143552: Pending [Start New Path](#)

Buyer Supervisor No Req

Pending
MORGAN,JP
Buyer's Supervisor

Approval Comments

[Approve](#) [Hold](#) [Deny](#)

[Return to Worklist](#)



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)

A PO maybe dispatched 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.

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

| New Window | Help | Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open

PO ID NEXT

Copy From Hold From Further Processing

▼ Header ?

*PO Date 07/05/2023	Supplier Search
*Supplier LYME COMPU-001	Supplier Details
*Supplier ID 0000000007	LYME COMPUTER SYSTEMS INC
*Buyer PAM.SPROUSE	SPROUSE,PAMELA M

PO Reference Software

Web IMS?:

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

Receipt Status Not Recvd

*Dispatch Method Print

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced NSEV

eVA Dttm

eVA Procure Type Supplies - Technology

eVA Confirming Order:

Amount Summary ?

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



Dispatching and Printing Purchase Orders (continued)

A dispatched printed PO has a place for the Buyer's signature. 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.
- Print another copy, by clicking the **Print Copy** checkbox (optional).
- Click **Run**.



Dispatching and Printing Purchase Orders (continued)

The PO may be printed as a PDF version, as a copy only. This printed version does not have a **Buyer** signature box.

Navigate to the **Print POs** page using the following path:

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

Print POs

Run Control ID test123
Language English

Report Manager Process Monitor Run

Specified Language Recipient's Language

Report Request Parameters

Business Unit 50100 To
PO ID 0001143551 Select Purchase Order
Contract SetID
Contract ID
Release
From Date
Through Date
Supplier ID
Buyer

Statuses to Include

Approved Dispatched Canceled
 Open Pending Completed

Miscellaneous Options

*Hold Status On Hold AND Not On Hold
*Chartfields Recycled AND Valid Chartfields
Change Orders UnChanged Orders
 Print Changes Only
 Print PO Item Description
 Print Duplicate
Number Of Copies 1
Sort By Sort by Line Number

Save Notify Add Update/Display



Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. Materials changes to POs interfaced from eVA into Cardinal are completed in eVA.

True or False



2. Once the creation of the PO is started, you can identify the following and associate to the PO.

- a) Items
- b) Suppliers
- c) Pricing
- d) Comments



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 _____



Lesson 2: Summary

2

Processing Purchase Orders

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: Introduction

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.

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs | New Window | Help | Personalize Page ▾

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 1264045 PO Status Dispatched △ ✕

Copy From Hold From Further Processing

▼ Header ?

*PO Date 03/17/2023 Supplier Search Backorder Status Not Backordered Create BackOrder

*Supplier CARTER MACHINE Supplier Details Receipt Status Not Recvd Dispatch

*Supplier ID 0000018192 Carter Machinery Company Inc *Dispatch Method Dispatch

*Buyer KELSIE COFFEY COFFEY,KELSIE LEE eVA PO Type R01 Routine Bill Vendor

PO Reference 46449 exp 4/15/23 eVA Order Method URL

Web IMS?: eVA Interfaced SEVA

Header Details Activity Summary eVA Dttm 03/20/23 11:30:17

PO Defaults Edit Comments

PO Activities Add ShpTo Comments

Requisitions Document Status

Actions

eVA Procure Type

eVA Confirming Order:

Amount Summary ?

Merchandise	24,112.00
Freight/Tax/Misc.	0.00
Total Amount	24,112.00 USD

Calculate



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. Navigate to this page by clicking on the **Schedule** icon.

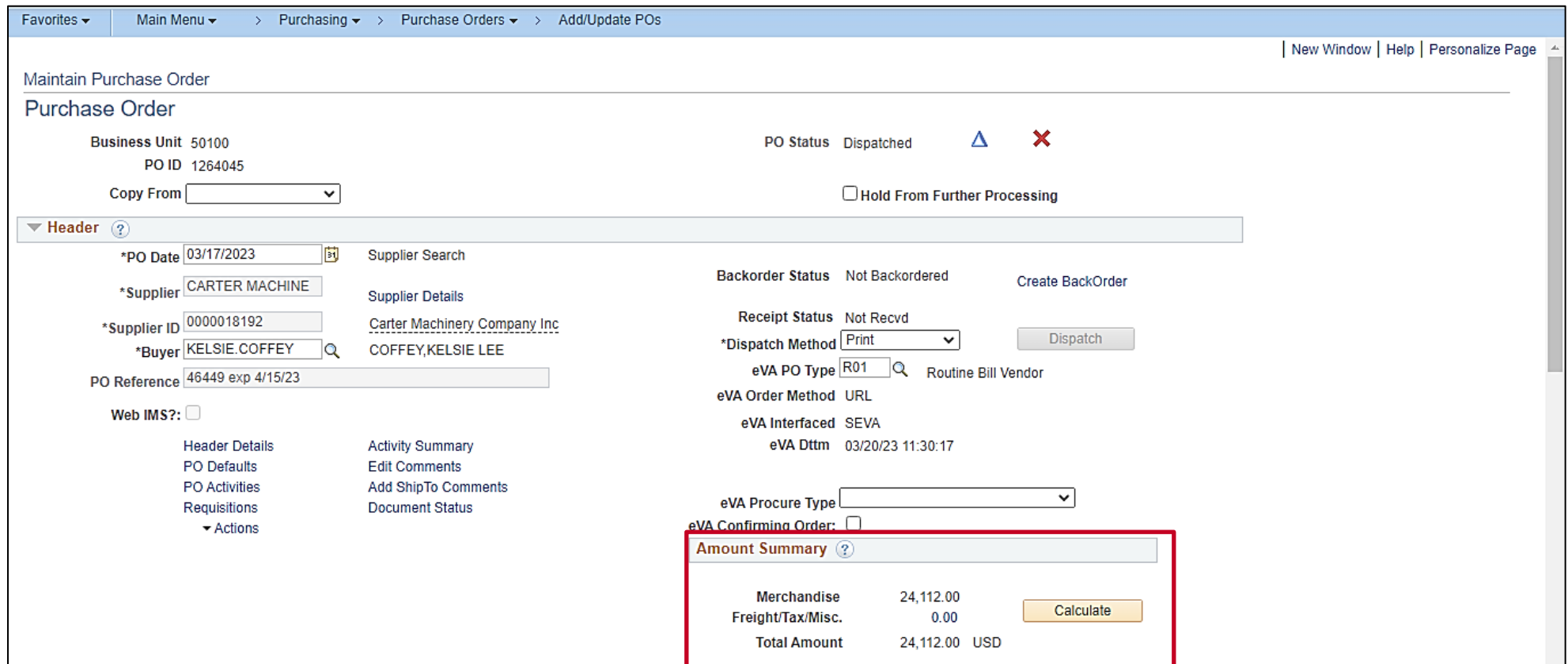
Do not change the price on a line that has been received against.

Once changes are made and **Saved**, 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, the quantity of a PO can be increased or decreased:



- 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 changes can be made.



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

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 1264045 PO Status Dispatched  

Copy From Hold From Further Processing

▼ Header ?

*PO Date 03/17/2023 Supplier Search

*Supplier CARTER MACHINE Supplier Details

*Supplier ID 0000018192 Carter Machinery Company Inc

*Buyer KELSIE.COFFEY COFFEY,KELSIE LEE

PO Reference 46449 exp 4/15/23

Web IMS?:

Header Details Activity Summary

PO Defaults Edit Comments

PO Activities Add ShipTo Comments

Requisitions Document Status

▼ Actions

Backorder Status Not Backordered Create BackOrder

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced SEVA

eVA Dttm 03/20/23 11:30:17

eVA Procure Type

eVA Confirming Order:

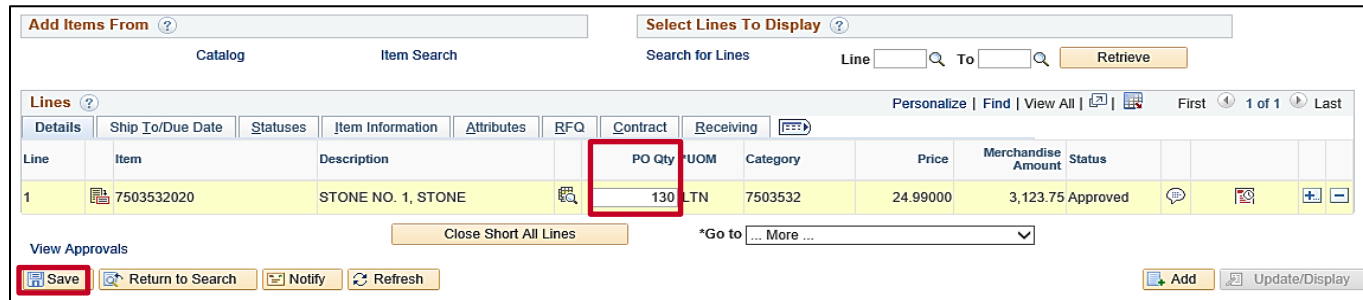
Amount Summary ?

Merchandise	24,112.00	
Freight/Tax/Misc.	0.00	<input type="button" value="Calculate"/>
Total Amount	24,112.00	USD

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 **125** to **130**.
- Click **Save**.

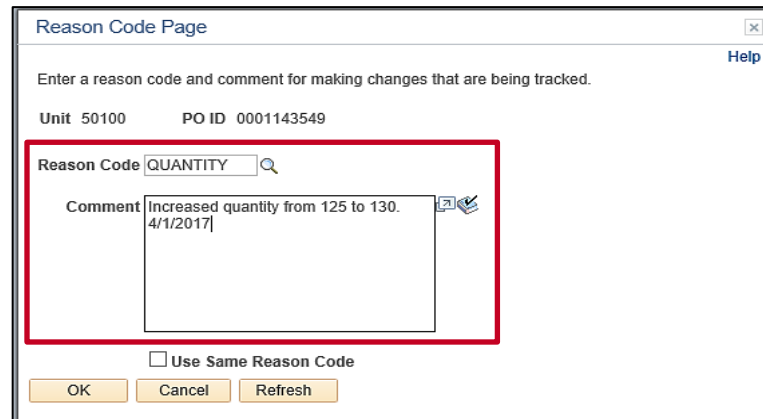


The screenshot shows the 'Maintain Purchase Order - Purchase Order' page. At the top, there are search filters for 'Add Items From' and 'Select Lines To Display'. Below these is a table with columns: Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, and Status. The first row is highlighted in yellow, and the 'PO Qty' field in this row is enclosed in a red box. Below the table, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'. The 'Save' button is also highlighted with a red box.

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	7503532020	STONE NO. 1, STONE	130	LTN	7503532	24.99000	3,123.75	Approved

The **Change Reason** pop-up window displays:

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



The screenshot shows the 'Reason Code Page' pop-up window. It contains a text area for 'Reason Code' with the value 'QUANTITY' and a 'Comment' field with the text 'Increased quantity from 125 to 130. 4/1/2017'. The 'Reason Code' and 'Comment' fields are enclosed in a red box. At the bottom, there are buttons for 'OK', 'Cancel', and 'Refresh'.

Reason Code Page

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

Unit 50100 PO ID 0001143549

Reason Code QUANTITY

Comment Increased quantity from 125 to 130.
4/1/2017

Use Same Reason Code

OK Cancel 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**.

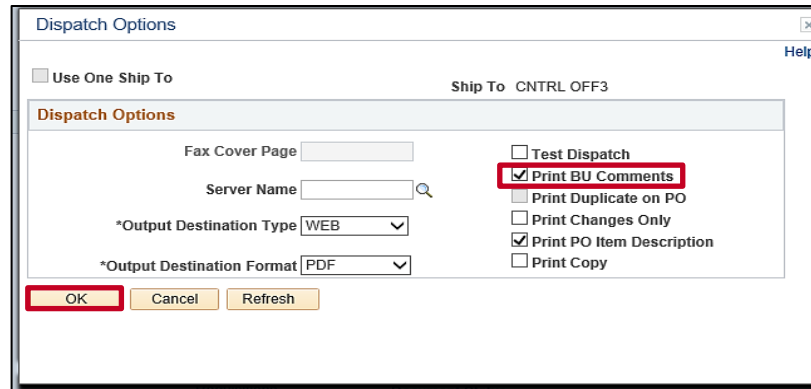
See the section in this lesson entitled Change Order Helpful Hints for additional details on change order approval processing.

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

Create Change Orders for a PO (continued)

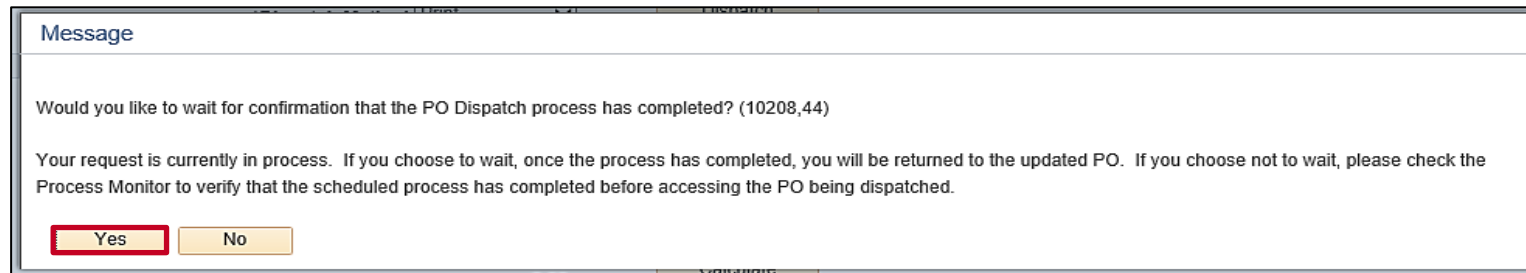
The **Dispatch Options** pop-up window displays:

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



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

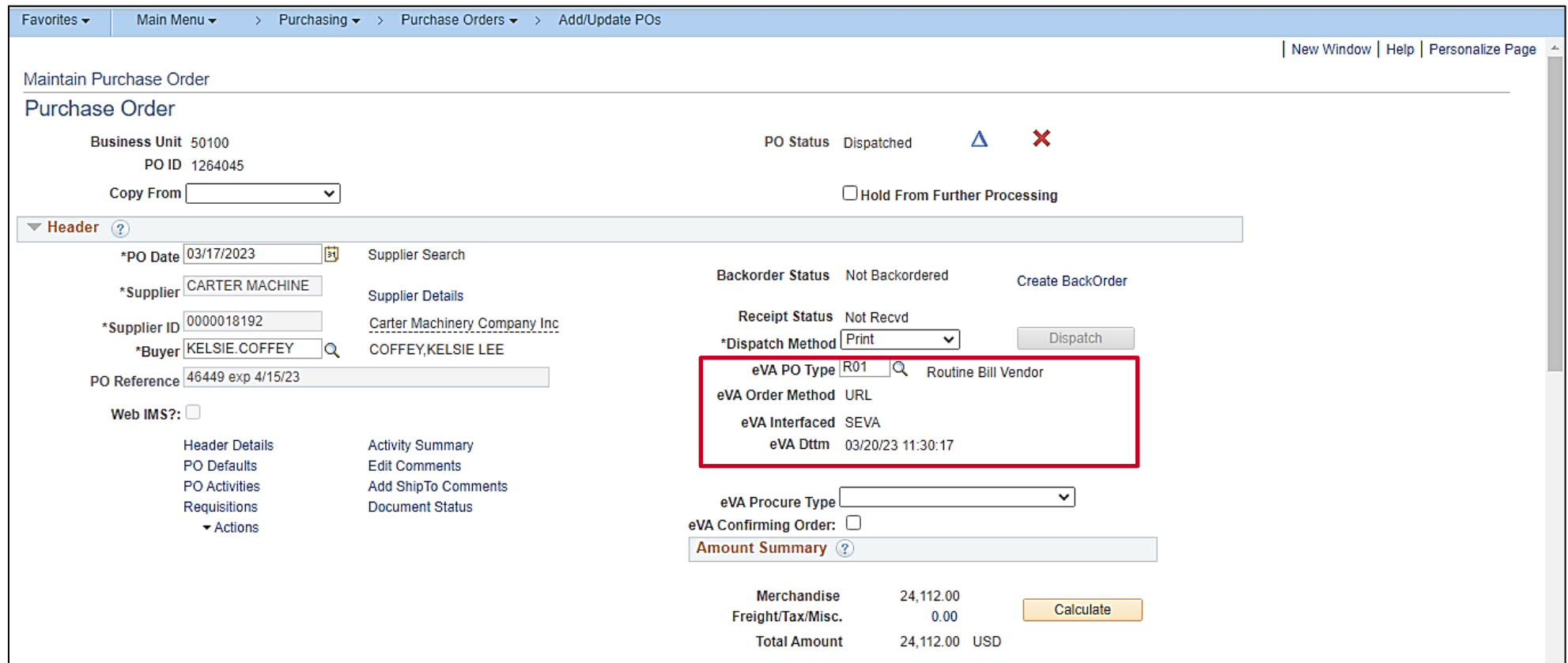
- Click **Yes**. Once the PO Dispatch process has completed, the **Maintain Purchase Order – Purchase Order** page will display.



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.



Business Unit 50100 PO ID 1264045 PO Status Dispatched

Copy From [dropdown] Hold From Further Processing

Header

*PO Date 03/17/2023 Supplier Search
*Supplier CARTER MACHINE Supplier Details
*Supplier ID 0000018192 Carter Machinery Company Inc
*Buyer KELSIE.COFFEY COFFEY,KELSIE LEE
PO Reference 46449 exp 4/15/23

Web IMS?:

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

Backorder Status Not Backordered Create BackOrder
Receipt Status Not Recvd
*Dispatch Method Print Dispatch
eVA PO Type R01 Routine Bill Vendor
eVA Order Method URL
eVA Interfaced SEVA
eVA Dttm 03/20/23 11:30:17
eVA Procure Type [dropdown]
eVA Confirming Order:

Amount Summary

Merchandise	24,112.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	24,112.00 USD	



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 if the quantity should be moved back into the Sourcing event. If yes, the quantity is put back to the award and can either be re-awarded 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)

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

| New Window | Help | Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 1264045 PO Status Dispatched ▲ ✖

Copy From Hold From Further Processing

▼ Header ?

*PO Date <input type="text" value="03/17/2023"/> <input type="button" value="B"/>	Supplier Search	Backorder Status	Not Backordered	<input type="button" value="Create BackOrder"/>
*Supplier <input type="text" value="CARTER MACHINE"/>	Supplier Details	Receipt Status	Not Recvd	
*Supplier ID <input type="text" value="0000018192"/>	Carter Machinery Company Inc	*Dispatch Method	<input type="text" value="Print"/> <input type="button" value="Dispatch"/>	
*Buyer <input type="text" value="KELSIE.COFFEY"/> <input type="button" value="Q"/>	COFFEY,KELSIE LEE	eVA PO Type	<input type="text" value="R01"/> <input type="button" value="Q"/> Routine Bill Vendor	
PO Reference <input type="text" value="46449 exp 4/15/23"/>		eVA Order Method	URL	
Web IMS?: <input type="checkbox"/>		eVA Interfaced	SEVA	
		eVA Dttm	03/20/23 11:30:17	
Header Details	Activity Summary	eVA Procure Type	<input type="text"/>	
PO Defaults	Edit Comments	eVA Confirming Order:	<input type="checkbox"/>	
PO Activities	Add ShipTo Comments	<input type="text" value="Amount Summary"/> ?		
Requisitions	Document Status	Merchandise	24,112.00	<input type="button" value="Calculate"/>
▼ Actions		Freight/Tax/Misc.	0.00	
		Total Amount	24,112.00 USD	



Create Change Orders for a PO: Cancel PO Line

Canceling the PO Line is available if the PO status is **Dispatched**. If a dispatched line is cancelled, 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.

Details for Line 1 [Close]

PO ID 0001143549 Supplier LL CARTER -003
Line 1 Item ID 7503532020 **STONE NO. 1, STONE** [Help]

Line Details

Category 7503532 Line Status Approved **X** ▲
Description STONE Backorder Status Not Backordered

Category ID 03113

Amount Summary

Amount to Receive	3,248.70	USD	Merchandise Amount	3,248.70	USD
Quantity to Receive	130.0000		Doc. Base Amt	3,248.70	USD

[Item Availability](#)

Transaction Item Description
STONE NO. 1, STONE

Preferred Language Item Description
STONE NO. 1, STONE

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

- ▶ **Item Information**
- ▶ **Attributes**
- ▶ **RFQ**
- ▶ **Contract**
- ▶ **Receiving**

OK Cancel Refresh



Create Change Orders for a PO: Cancel PO Schedule

Canceling the PO Schedule is available if the PO status is **Dispatched**. If a dispatched schedule is cancelled, 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 open the **Details for Schedule** pop-up window. Click the red **X** to cancel the purchase order schedule. The system cancels the PO schedule.

Details for Schedule 1

Unit 50100 Supplier SUPERIOR P-005
PO ID 0001201045 Item 7452150000 BM-25.0 (BASE MIXTURE) BM-25.0

Line 2
Schedule 1

Status Active ▲ ✖

Schedule Details

Due Date 08/07/2019 Custom Price - No Override
Time Due Zero Price Indicator No Charge
Ship To FREDRK RES

Original Promise Date 08/07/2019

Ship Date

Ship Via COMMON Common Carrier

Freight Terms FOB DEST FOB Dest, Freight Prepaid

Attention To

Distribute By Quantity

Amount Summary

Schedule Qty	75.0000
Merchandise Amt	5,163.90 USD
Doc. Base Amount	5,163.90 USD



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 detailed information about change order approval requirements, see the course entitled **501 PR343: Procurement Approvals** located on the Cardinal website in **Course Materials** under **Learning**.



Change Order Helpful Hints

Change Order Approvals Summary:

- Adding a line to a PO will require Supervisor approval.
- Changes < 25% do not need Supervisor approval.
- Changes > 25% will escalate to the Supervisor for approval.
- Changes > 25% or \$50,000 (whichever is greater) to PO with original value > \$50,000 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. Access this page through the worklist using the hyperlink at the bottom of every page.

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 to be approved.

For more detailed information about change order approvals, see the course entitled **501 PR343: Procurement Approvals** located on the Cardinal website in **Course Materials** under **Learning**.

The screenshot displays the 'Purchase Order Approval' page. At the top, navigation links for 'Main Menu' and 'Worklist' are highlighted with red boxes. The page title 'Purchase Order Approval' is also highlighted. Below the title, PO details are shown: Business Unit 50100, PO ID 0001196509, PO Total 408,420.00 USD, Supplier ID 0000015454, Buyer DEBBIE.BELL, and PO Reference 50% Change Order Test. The PO Status is 'Pend Appr' and the PO Date is 09/16/2019. A justification box contains the text 'No justification entered by buyer.' Below this is an 'Edit PO' button.

The 'Review Lines' section contains a table with the following data:

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	Original Substituted Item	Description
<input type="checkbox"/>	1	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	3500.0000	LTN	116.12000	408,420.00	USD		

Below the table are 'Select All' and 'Clear All' checkboxes, and a 'View Lines Details' button. The 'Review / Edit Approvers' section shows the approval workflow for 'Purchase Order 0001196509: Pending'. The workflow includes: 'Admin Approved' by Kimberlin, Kelley (VDOT) on 09/18/19, 'Admin Approved' by Peterson, Toya N. (VDOT) on 09/19/19, 'Pending' by Multiple Approvers ASD Director Approval, and 'Reviewer' by Bebb, Angelika (VDOT). Below the workflow are 'Comments' and 'Comment History' sections, and an 'Approval Comments' text area. At the bottom are 'Approve', 'Hold', 'Deny', and 'Pushback' buttons.



Approve Change Orders (continued)

Navigation: Favorites > Main Menu > Worklist > Worklist

Purchase Order Approval

Business Unit: 50100
PO ID: 0001196509
PO Total: 408,420.00 USD
Supplier ID: 0000015454 Cargill Inc
Buyer: DEBBIE.BELL
PO Reference: 50% Change Order Test
PO Status: Pend Appr
PO Date: 09/18/2019
Justification: No justification entered by buyer.

[Edit PO](#)

Review Lines

Line Details

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	Original Substituted Item	Description
<input type="checkbox"/>	1	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	3500.0000	LTN	116.12000	408,420.00	USD		

Select All Clear All [View Lines Details](#)

Review / Edit Approvers

PO/CO for Supervisor Action
Purchase Order 0001196509: **Approved** [Start New Path](#)

CO for Procurement MNGT Action
Purchase Order 0001196509: **Pending** [View/Hide Comments](#) [Start New Path](#)

Change Ord - Orig Val > 50000

```
graph LR
    A[Admin Approved  
Kimberlin, Kelley (VDOT)  
Procurement Manager Approval  
08/18/19 - 10:07 AM] --> B[Admin Approved  
Peterson, Toya N. (VDOT)  
Sr Procurement Mgr Approval  
09/18/19 - 10:09 AM]
    B --> C[Pending  
Multiple Approvers  
ASD Director Approval]
    C --> D[Reviewer  
Babb, Angelika (VDOT)  
Reviewer]
```

Comments
Comment History

Approval Comments

[Approve](#) [Hold](#) [Deny](#) [Pushback](#)



Simulation: Creating a Purchase Order/Ad-Hoc

You will now view a simulation that demonstrates how to **Create a Purchase Order/Ad-Hoc**.





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 more detailed information about making these changes, see the job aid entitled **501 PR344: Update ChartFields on Partially Vouchered Purchase Orders** located on the Cardinal website in **Job Aids** under **Learning**.

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 to open the **Schedules** page.
- Select the **Distributions/ChartFields** icon on the line to be changed.
- Enter the new ChartField values.
- Click **OK** to save.



Purchase Order: Modify Accounting Distribution (continued)

Modify Accounting Distributions: Single Line

Lines ?										Personalize	Find	View All	First	1 of 1	Last
Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving								
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status							
1	7503532020	STONE NO. 1, STONE	125.0000	LTN	7503532	24.99000	3,123.75	Approved							

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Dispatched
PO ID 0001143549 PO Date 12/22/2016

[Return to Main Page](#)

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003
PO ID 0001143549 Item 7503532020
Line 1 **STONE NO. 1, STONE**

*Distribute By:

SpeedChart Multi-SpeedCharts

Distribution										Personalize	Find	View All	First	1 of 1	Last
Chartfields	Details/Tax	Asset Information	Req Detail	Statuses											
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department				
1	Open	100.0000	130.0000	3,248.70	USD	50100		5012550	04100	699001	10003				

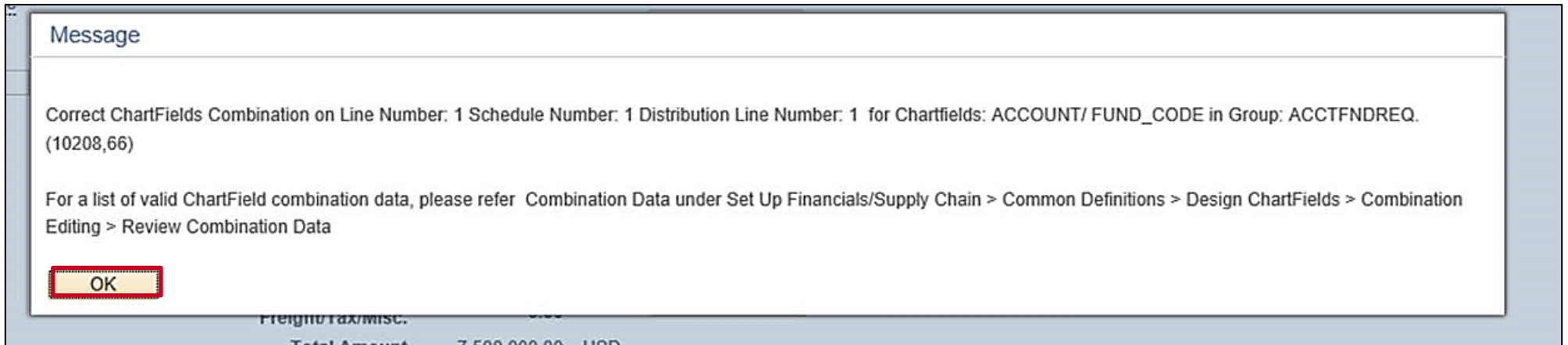
OK Cancel Refresh



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 **Account** is required.

For more detailed information about combination edits, see the job aid entitled **501 GL332: Combination Edits Review Tools** located on the Cardinal website in **Job Aids** under **Learning**.





Purchase Order: Modify Accounting Distribution (continued)

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.

Access the accounting distribution lines from the **Maintain Purchase Order – Purchase Order** pop-up window 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.

Purchase Order Defaults

Business Unit 50100 PO ID 0001143549 Supplier LL CARTER -003 Change Order 1

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 OFF3 Central Office Old Bldg Ultimate Use Code []
Due Date [] Original Promise Date []
Ship Via COMMON Freight Terms Code FOB DEST
Arbitration [] Freight Charge Method []
*Distribute By Quantity One Time Address

Distribution

SpeedChart []

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

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
1	[]	50100	[]	[]	[]	[]	10081	[]	[]

OK Cancel Refresh



Purchase Order: Modify Accounting Distribution (continued)

Purchase Order Defaults Help

Business Unit 50100 PO ID 0001143549 Supplier LL CARTER -003 Change Order 1

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 Central Office Old Bldg Ultimate Use Code

Due Date Original Promise Date

Ship Via Freight Terms Code

Arbitration

*Distribute By Freight Charge Method

One Time Address

Distribution

SpeedChart

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

Chartfields Asset Information

Dist	Percent	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task
1	<input type="text"/>	<input type="text" value="50100"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="10081"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. Modifying the accounting distribution does not trigger change order approval.

True or 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

3

Maintain and Modify Purchase Orders (Change Orders)

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 page.
- To cancel a PO Line, 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: Introduction

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 by the supplier, the quantities, or amounts must be decreased or increased, to match the actual amount/quantity received.

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

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

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

Maintain Purchase Order
Purchase Order

Business Unit: 50100
PO ID: 1264045
Copy From: [Dropdown]
PO Status: Dispatched
 Hold From Further Processing

Header

*PO Date: 03/17/2023
*Supplier: CARTER MACHINE
*Supplier ID: 0000018192
*Buyer: KELSIE COFFEY
PO Reference: 46449 exp 4/15/23
Web IMS?:

Supplier Search
Supplier Details
Carter Machinery Company Inc
COFFEY,KELSIE LEE

Backorder Status: Not Backordered
Receipt Status: Not Recvd
*Dispatch Method: Print
eVA PO Type: R01
eVA Order Method: URL
eVA Interfaced: SEVA
eVA Dttm: 03/20/23 11:30:17

Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Edit Comments
Add ShipTo Comments
Document Status

Create BackOrder
Dispatch
Routine Bill Vendor

eVA Procure Type: [Dropdown]
eVA Confirming Order:

Amount Summary

Merchandise	24,112.00	
Freight/Tax/Misc.	0.00	
Total Amount	24,112.00	USD

Calculate



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**. Scroll to the right and make note of the quantity ordered.
- Click on the **Receipt** tab.

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

Activity Summary

Business Unit 50100 PO Status Dispatched
Purchase Order 0001143553 Supplier LL Carter & Son Inc
Supplier Location MAIN

Merchandise Amount	6,247.50 USD
Merchandise Receipt	4,998.00 USD
Merchandise Returned	0.00 USD
Merchandise Invoice	0.00 USD
Merchandise Matched	0.00 USD

Lines Personalize | Find | View All | [Print] [Refresh] First 1 of 1 Last

Details Receipt Invoice Matched RTV [Filter]

Line	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1	7503532020	STONE NO. 1, STONE	LTN	250.0000	6,247.500	USD	<input type="checkbox"/>

Return to Search Notify



Reconciling/Close a PO (continued)

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

Navigation: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs > Activity Summary

Activity Summary

Business Unit 50100
Purchase Order 0001143553

PO Status Dispatched
Supplier LL Carter & Son Inc
Supplier Location MAIN

Merchandise Amount 6,247.50 USD
Merchandise Receipt 4,998.00 USD
Merchandise Returned 0.00 USD
Merchandise Invoice 0.00 USD
Merchandise Matched 0.00 USD

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

Details **Receipt** Invoice Matched RTV

Line	Item	Item Description	UOM	Qty Received	Qty Accepted	Open Quantity	Open Amount	Currency
1	7503532020	STONE NO. 1, STONE LTN		200.0000	200.0000	50.0000	1,249.500	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 Dispatched
Purchase Order 0001143553 Supplier LL Carter & Son Inc
Supplier Location MAIN

Merchandise Amount 6,247.50 USD
Merchandise Receipt 4,998.00 USD
Merchandise Returned 0.00 USD
Merchandise Invoice 0.00 USD
Merchandise Matched 0.00 USD

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

Details Receipt **Invoice** Matched RTV

Line	Item	Item Description	UOM	Quantity Invoiced	Amount Only	Amt Invoiced	Currency	Un-invoiced Quant
1	7503532020	STONE NO. 1, STONE	LTN	0.0000	<input type="checkbox"/>	0.0000	USD	250.00

Return to Search Notify



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 Dispatched
Purchase Order 0001143553 Supplier LL Carter & Son Inc
Supplier Location MAIN

Merchandise Amount 6,247.50 USD
Merchandise Receipt 4,998.00 USD
Merchandise Returned 0.00 USD
Merchandise Invoice 0.00 USD
Merchandise Matched 0.00 USD

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

Details Receipt Invoice **Matched** RIV

Line	Item	Item Description	UOM	Qty Matched	Amt Matched	Currency
1	7503532020	STONE NO. 1, STONE	LTN	0.0000	0.000	USD

Return to Search Notify



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.

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

Requisitions Document Status eVA Procure Type [v]
▼ Actions eVA Confirming Order:
Amount Summary ?

Merchandise 24,112.00
Freight/Tax/Misc. 0.00 Calculate
Total Amount 24,112.00 USD

Add Items From ? Catalog Item Search
Select Lines To Display ? Search for Lines Line [] To [] Retrieve

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	9750001000	MINI EXCAVATOR 305 (11,000lbs / 11' Dig Depth) RENT/LEASE VEHICLES & EQUIPMENT RENT/LEASE VEHICLES & EQUIPMENT	11.0000	HUR	9750001	2,192.00000	24,112.00	Approved			
2	9750001000	RENT/LEASE VEHICLES & EQUIPMENT RENT/LEASE VEHICLES & EQUIPMENT	11.0000	HUR	9750001	0.00001	0.00	Approved			

View Approvals Close Short All Lines *Go to [] More ... [v]



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 the changes 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** pop-up window is displayed.
 - Click the **Distribution** icon for each line.

Message

This action will create a change order. Continue? (10200,27)

The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.

Navigation: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Dispatched
PO ID 0001143553 PO Date 01/09/2017

[Return to Main Page](#)

Line 1	Item 7503532020	STONE NO. 1, STONE	PO Qty	200.0000	LTNMerchandise Amt	4,998.00 USD				
Schedules Personalize 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	01/09/2017	CNTRL OFF3	200.0000	24.99000	4,998.00	Active				

Add ShipTo Comments



Reconciling/Close a PO (continued)

- Verify that the **PO Qty** field on each distribution line matches the changes 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.

Distributions for Schedule 1 Help

Unit 50100 Supplier LL CARTER -003
PO ID 0001143553 Item 7503532020 STONE NO. 1, STONE
Line 1
Schedule 1 Status Active

*Distribute By Schedule Qty 200.0000
Merchandise Amount 4,998.00 USD
Doc. Base Amount 4,998.00 USD

SpeedChart [Multi-SpeedCharts](#)

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

Chartfields	Details/Tax	Asset Information	Req Detail	Statuses							
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Entry Event	*Account	Fund	Program	Department
1	Open	100.0000	200.0000	4,998.00	USD	50100		5012550	04100	699001	10003



Reconciling/Close a PO (continued)

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

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

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Dispatched
PO ID 0001143553 PO Date 01/09/2017

Return to Main Page

Lines Find | View All First 1 of 1 Last

Line	Item	Description	PO Qty	LTN Merchandise Amt	USD
1	7503532020	STONE NO. 1, STONE	200.0000	4,998.00	USD

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

Details | Statuses | Shipment | Matching | Receiving | Ereight | RTV

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	01/09/2017	CNTRL OFF3	200.0000	24.99000	4,998.00	Active

Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display



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 made to the **PO Qty** field on the on the **Schedules** page and the **Distributions for Schedule X** page.

Navigation: Favorites | Main Menu | Purchasing | Purchase Orders | Add/Update POs

Requisitions | Document Status | eVA Procure Type | eVA Confirming Order:

Amount Summary ?

Merchandise 24,112.00
Freight/Tax/Misc. 0.00
Total Amount 24,112.00 USD

Calculate

Add Items From ? | Select Lines To Display ?

Catalog | Item Search | Search for Lines | Line [] To [] Retrieve

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	9750001000	MINI EXCAVATOR 305 (11,000lbs / 11' Dig Depth) RENT/LEASE VEHICLES & EQUIPMENT RENT/LEASE VEHICLES & EQUIPMENT	11.0000	HUR	9750001	2,192.00000	24,112.00	Approved				
2	9750001000	RENT/LEASE VEHICLES & EQUIPMENT RENT/LEASE VEHICLES & EQUIPMENT	11.0000	HUR	9750001	0.00001	0.00	Approved				

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



Reconciling/Close a PO (continued)

Once the updates to the PO have been made it is important to ensure that the sum of accounting distribution matches the 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 to be reviewed. The **Schedules** page for the line will display. Review each line's accounting distribution.
- From the **Details** tab, click on the **Distribution** icon. The **Distributions for Schedule X** pop-up window will display.

Unit 50100 Supplier LL CARTER -003 PO Status Dispatched
PO ID 0001143553 PO Date 01/09/2017

[Return to Main Page](#)

Lines Find | View All First 1 of 1 Last

Line	Item	STONE NO. 1, STONE	PO Qty	200.0000	LTNMerchandise Amt	4,998.00 USD
Schedules Personalize Find View All First 1 of 1 Last						
Details Statuses Shipment Matching Receiving Freight RTV EFF						
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	01/09/2017	CNTRL OFF3	200.0000	24.99000	4,998.00	Active

Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display



Reconciling/Close a PO (continued)

The **Distributions for Schedule X** pop-up window will display:

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

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



Reconciling/Close a PO (continued)

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

Reason Code Page

Enter a reason code and comment for making changes that are being tracked. [Help](#)

Unit 50100 PO ID 0001143553

Reason Code

Comment

Use Same Reason Code

- 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.

Favorites Main Menu Purchasing Purchase Orders Add/Update POs | New Window Help Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 000127593 PO Status Approved

Copy From

Hold From Further Processing

▼ Header ?

*PO Date 06/30/2023	Supplier Search
*Supplier SES AMERIC-001	Supplier Details
*Supplier ID 0000002139	SES America Inc
*Buyer RHONDA.THARRING	THARRINGTON, RHONDA J

PO Reference PO04356526

Web IMS?:

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

Receipt Status Not Recvd

*Dispatch Method

eVA PO Type EVP eVA Purchase Order

eVA Order Method EXCP

eVA Interfaced RSEV

eVA Dttm 07/01/23 07:10:09

eVA PO ID PO04356526

eVA Procure Type

eVA Confirming Order:



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.

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

New Window | Help | Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit 50100
PO ID 0001270590

Copy From

PO Status Approved

Hold From Further Processing

▼ Header ?

*PO Date	06/30/2023	Supplier Search
*Supplier	MANSFIELD-064	Supplier Details
*Supplier ID	0000047959	MANSFIELD OIL Co of Gainesville Inc
*Buyer	EVA.BUYER	EVA BUYER

PO Reference

Web IMS?:

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

Receipt Status Not Recvd

*Dispatch Method

eVA PO Type EVP eVA Purchase Order

eVA Order Method EXCP

eVA Interfaced Y

eVA Dttm 07/01/23 07:10:09

eVA PO ID PO04356223

eVA Procure Type

eVA Confirming Order:

Amount Summary ?

Merchandise	16,000.00	
Freight/Tax/Misc.	0.00	<input type="button" value="Calculate"/>
Total Amount	16,000.00	USD



Lesson 4: Summary

4

Reconciling/Close the PO

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: Introduction

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, it is possible to view all future transactions and related activities, including 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 allows viewing details of the PO. This page is a display-only version of the **Maintain Purchase Order – Purchase Order** page. From here, other pages, such as **Activity Summary** and **Change Order** can be displayed, where additional details of the PO can be viewed.

Navigate to this page using the following path:

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

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

Business Unit 50100 PO Status Approved
PO ID 0001143553
Change Order 1

Header

PO Date 01/09/2017
Supplier Name [LL CARTER -003](#)
Supplier ID 0000033093 Supplier Details
Buyer MASON, GEORGE
PO Reference Stone

Backorder Status Not Backordered
Receipt Status Received
 Hold From Further Processing

Amount Summary

Merchandise	4,998.00
Freight/Tax/Misc.	0.00
Total	4,998.00 USD

Lines

Line	Item ID	Item Description	Category	PO Qty UOM	Merchandise Amount	Status		
1	7503532020	STONE NO. 1, STONE	7503532	200.0000 LTN	4,998.00 USD	Approved		

View Approvals

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



Purchase Order Inquiry Page (continued)

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

Purchase Order Inquiry
Purchase Order

Business Unit 50100 PO Status Approved
 PO ID 0001143553
 Change Order 1

Header

PO Date 01/09/2017 Backorder Status Not Backordered
 Supplier Name LL CARTER -003 Receipt Status Received
 Supplier ID 0000033093 **Supplier Details** Hold From Further Processing
 Buyer MASON,GEORGE
 PO Reference Stone

Amount Summary

Merchandise	4,998.00
Freight/Tax/Misc.	0.00
Total	4,998.00 USD

Header Details Activity Summary
 Change Order Header Comments
 All RTV Document Status
 Matching Actions

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

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1	7503532020	STONE NO. 1, STONE	7503532	200.0000	LTN	4,998.00 USD	Approved

View Approvals

Return to Search 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** pop-up window. This page displays more details about the supplier for the PO.

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

Supplier Details -- LL Carter & Son Inc Help

Business Unit 50100 PO ID 0001143553 Change Order 1

Location MAIN Terms 30 Net 30

Address 4 Basis Date Type Prompt Payment

Contact Basis Date

Salesperson

Address Details

Country USA United States Fax 330/349-1341

Address 1 17460 Countyline Church Road Prefix 1

Address 2 Phone 446/043-8809

eVA VLIN VA10051504

eVA Address ID: EVAAD227788

City Ruther Glen

County 077946325 Postal 22546

State VA Virginia



Purchase Order Inquiry Page: Supplier Details (continued)

Supplier Details -- LL Carter & Son Inc Help

Business Unit 50100 PO ID 0001143553 Change Order 1

Location MAIN Terms 30 Net 30

Address 4 Basis Date Type Prompt Payment

Contact Basis Date

Salesperson

Address Details

Country USA United States Fax 330/349-1341

Address 1 17460 Countyline Church Road Prefix 1

Address 2 Phone 446/043-8809

eVA VLIN VA10051504

eVA Address ID: EVAAD227788

City Ruther Glen

County 077946325 Postal 22546

State VA Virginia



Purchase Order Inquiry Page: Header Details

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

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

PO Header Details Help

Business Unit 50100 PO ID 0001143553 Change Order 1

PO Details

Supplier LL Carter & Son Inc Origin ONL Online Tax Exempt

PO Date 01/09/2017 ID 546001730

PO Type General Letter of Credit ID

Billing Location CNTRL OFF3 [Billing Address](#)

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

Dispatch

Return



Purchase Order Inquiry Page: Header Details (continued)

PO Header Details			Help		
Business Unit	50100	PO ID	0001143553	Change Order	1
PO Details					
Supplier	LL Carter & Son Inc		Origin	ONL Online	<input checked="" type="checkbox"/> Tax Exempt
PO Date	01/09/2017		ID	546001730	
PO Type	General		Letter of Credit ID		
Billing Location	CNTRL OFF	Billing Address			
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		
<input checked="" type="checkbox"/> Dispatch					
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. Click the **OK** button to return to the **Purchase Order Inquiry** page when review is completed.

PO Header Details - Bill To Address ✕

[Help](#)

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, 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** pop-up window.

PO Header Comments [Close]

Business Unit 50100 PO ID 0001143553 Supplier LL CARTER -003 Change Order 1 [Help]

Retrieve Active Comments Only [Retrieve]

*Sort Method *Sort Sequence [Sort]

Comments Find | View All First 1 of 1 Last

Comment Status Active

This is CONFIRMING Purchase Order for Contract number UM512PMC100017 DO NOT DUPLICATE

Send to Supplier Shown at Receipt
 Shown at Voucher Approval Justification

Associated Document

Attachment [Attach] [View] Email

From -> PO 50100-0001143553

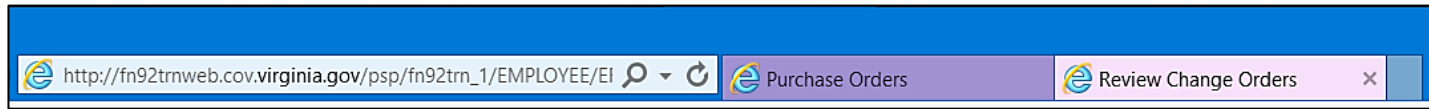
[OK] [Cancel]



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 or close the **Change Order** internet tab and return to the **Purchase Order Inquiry** page.



Unit 50100 PO ID 0001143553

Changes to PO Schedules Personalize | Find | View All | 1-5 of 12 Last

Line	Sched	Batch	Seq	Description	Value		User Modify	Last Change Date
1	1	0	0	Status	A	Reason	GEORGE.MASON	01/14/2017 3:06:17PM
1	1	0	0	Due Date	01/09/2017	Reason	GEORGE.MASON	01/14/2017 3:06:17PM
1	1	0	0	Freight Terms Code	FOB DEST	Reason	GEORGE.MASON	01/14/2017 3:06:17PM
1	1	0	0	Merchandise Amount	6247.50000	Reason	GEORGE.MASON	01/14/2017 3:06:17PM
1	1	0	0	Original Promise Date	01/09/2017	Reason	GEORGE.MASON	01/14/2017 3:06:17PM

Return to Search | Notify

Header Changes | Line Changes | Ship Changes



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 or close the **Document Status** internet tab and return to the **Purchase Order Inquiry** page.



Document Status

Business Unit 50100 PO ID 0001143553
 Document Date 01/09/2017 Status Approved
 Currency USD Document Type Purchase Order
 Buyer MASON,GEORGE Merchandise Amt 4,998.00

Requisitions Sourcing Events **Procurement Contracts(1)** Purchase Orders Service Work Orders Receipts(1) Returns Vouchers Payments

Show All

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

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	STATE		Contract	00000000000000000000000044966	Approved	07/14/2016	0000033093	
▼ Actions		50100	Receipt	0001884215	Received	01/09/2017	0000033093	MAIN

Return to Search



Purchase Order Inquiry Page: Lines

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

[Favorites](#) > [Main Menu](#) > [Purchasing](#) > [Purchase Orders](#) > [Review PO Information](#) > [Purchase Orders](#)

Purchase Order Inquiry

Purchase Order

Business Unit 50100 PO ID 0001201019 PO Status Approved

Header

PO Date 08/06/2019
 Supplier Name VULCAN CON-001 Backorder Status Not Backordered
 Supplier ID 0000009329 Supplier Details Receipt Status Not Recvd
 Buyer Hodge, Ronnie (VDOT) Hold From Further Processing
 PO Reference FOB STONE

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

Amount Summary

Merchandise	10,237.50
Freight/Tax/Misc.	0.00
Total	10,237.50 USD

Lines Personalize | Find | View All | First 1-4 of 4 Last

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1	7503532030	STONE NO. 3, STONE	7503532	175.0000	LTN	1,925.00 USD	Approved
2	7503548485	STONE, CRUSHED GRADE 26	7503548	250.0000	LTN	1,762.50 USD	Approved
3	7503518200	STONE, RIP RAP CLASS 1	7503518	100.0000	LTN	1,800.00 USD	Approved
4	7503551400	STONE RIP RAP CLASS II	7503551	250.0000	LTN	4,750.00 USD	Approved

View Approvals

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



Purchase Order Inquiry Page: Line Details

When the **Line Details** icon in the **Lines** section of the **Purchase Order Inquiry** page, is clicked, the **Details for Line** pop-up window 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.

Details for Line VULCAN CON-001			
PO ID 0001201019	Line 1	STONE NO. 3 STONE	
Status Approved	<input type="checkbox"/> Amount Only	Backorder Status Not Backordered	
Line Details			
Physical Nature Goods			
Merchandise Amt	1,925.00	Currency	USD
Category	7503532	Category ID	03113
STONE			
Contract SetID	STATE	Version 3	
Contract	000000000000000000045275	Contract Details	
Contract Line	2	Category Line	
Group ID		Original Substituted Item	
Release	276	Description	
RFQ ID		RFQ Line	
Supplier Item ID			
Supplier's Catalog			
GPO Contract		GPO ID	
Manufacturer ID		UPN Type	
		UPN ID	
Mfg Item ID			
Price Qty	Line	Price Date	PO
<input type="checkbox"/> Withholding		<input type="checkbox"/> Device Tracking	
Receiving Required	Required	Replenish Code	Standard
<input type="checkbox"/> Inspect		Inspect ID	
Configuration Code			



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** pop-up window will be displayed with the full **Transaction Item Description** text.

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

Item Description

Item ID 7503532030

Transaction Item Description

STONE NO. 3, STONE

Preferred Language Item Descr

STONE NO. 3, STONE

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** pop-up window will be displayed. From the **PO Line Comments** page, click **OK** to return to the **Purchase Order Inquiry** page.

PO Line Comments

Business Unit 50100 PO ID 0001201019 Supplier VULCAN CON-001

Retrieve Active Comments Only

*Sort Method *Sort Sequence

Comments Find | View All First ◀ 1 of 1 ▶ Last

Comment Status Active

Send to Supplier Shown at Receipt

Shown at Voucher

Associated Document

Attachment	Attach	View	<input type="checkbox"/> Email
	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="checkbox"/>

From -> PO 50100-0001201019-1



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 to be viewed. 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.

Navigation: Favorites | Main Menu | Purchasing | Purchase Orders | Review PO Information | Purchase Orders

Business Unit 50100 PO ID 0001201019

Return to Main Page

Lines Find | View All First 1 of 4 Last

Line	STONE NO. 3, STONE	PO Qty	175.0000	LTN	Merchandise Amt	1,925.00	USD		
Schedules Personalize Find View All First 1 of 1 Last									
Details Statuses									
Sched	Due Date	Time Due	Revision	Ship To	Attention To	PO Qty	Price	Merchandise Amount	Status
1	08/06/2019			MONTER AHQ		175.0000	11.00000	1,925.00 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.

Details for Schedule 1

PO ID 0001201019 Status Active
Line Number 1 Schedule 1
Item ID 7503532030 Backordered From Schedule
 STONE NO. 3, STONE

Schedule Details

Due Date 08/06/2019 Custom Price - No Override
Original Promise Date 08/06/2019 No Charge
Ship Date Frozen (Planning)
Ship To MONTER AHQ

Ship Via COMMON Common Carrier

Freight Terms FOB DEST FOB Dest, Freight Prepaid

Matching Full Match

Match Status PO Not Matched

Amount Summary

PO Qty	175.0000
Merchandise Amount	1,925.00 USD
Doc. Base	1,925.00 USD

Matching Controls

	Tolerance Over	Tolerance Under
Unit Price Tolerance		
% Unit Price Tolerance	0.01	999.99
Ext Price Tolerance		
% Ext Price Tolerance	10.50	999.99

Receiving Controls

Reject Qty Over Tolerance

Early Ship Reject Days 2

Qty Rcvd Tolerance % 10.00

Close Under Qty %

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 scrolling right will display all the fields.

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

Distributions for Schedule 1																	
PO ID		0001201019		Line 1		Sched 1		Item 7503532030		STONE NO. 3, STONE							
Status Active				Sched Qty 175.0000													
Distribute By Quantity				Merchandise Amount		1,925.00		USD									
				Doc. Base Amount		1,925.00		USD									
Distributions																	
Chartfields		Details/Tax		Asset Information		Req Detail											
Dist	Status	Percent	PO Qty	Merchandise Amt	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	
1	Open	100.0000	175.0000	1,925.00	USD	50100	5013560	04100	604003	18042	11163550	74759	091	10289			



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. Click to get more information about the requisition.

Distributions for Schedule 1

PO ID 0001201019 Line 1 Sched 1 Item 7503532030 STONE NO. 3, STONE

Status Active Sched Qty 175.0000

Distribute By Quantity Merchandise Amount 1,925.00 USD

Doc. Base Amount 1,925.00 USD

Distributions Personalize | Find | View All | [Print] [Calendar] First 1 of 1 Last

Chartfields | Details/Tax | Asset Information | **Req Detail** [More]

Dist	Status	Percent	Req BU	Req ID	Req Line	Req Sched	Req Dist	Requester	Requisition Name	Attention To	Phone	Fax
1	Open	100.0000		Req ID								

Return



Activity Summary Page

View what has been received 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.

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
Purchase Order 0001201019

PO Status Approved
Supplier Vulcan Construction Materials
Supplier Location MAIN

Merchandise Amount 10,237.50 USD
Merchandise Receipt 0.00 USD
Merchandise Returned 0.00 USD
Merchandise Invoice 0.00 USD
Merchandise Matched 0.00 USD

Lines

Personalize | Find | View All | First 1-4 of 4 Last

Line	Line Details	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	UPN
1		7503532030	STONE NO. 3, STONE	LTN			
2		7503548485	STONE, CRUSHED GRADE 26	LTN			
3		7503518200	STONE, RIP RAP CLASS 1	LTN			
4		7503551400	STONE RIP RAP CLASS II	LTN			

Return to Search | Notify



Activity Summary Page (continued)

Activity Summary

Business Unit 50100

PO Status Approved

Purchase Order 0001201019

Supplier Vulcan Construction Materials

Supplier Location MAIN

Merchandise Amount	10,237.50 USD
Merchandise Receipt	0.00 USD
Merchandise Returned	0.00 USD
Merchandise Invoice	0.00 USD
Merchandise Matched	0.00 USD

Lines

Personalize | Find | View All | [Print] | [Calendar] First 1-4 of 4 Last

Details | Receipt | Invoice | Matched | RTV | [Filter]

Line	Line Details	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	UPN
1		7503532030	STONE NO. 3, STONE	LTN			
2		7503548485	STONE, CRUSHED GRADE 26	LTN			
3		7503518200	STONE, RIP RAP CLASS 1	LTN			
4		7503551400	STONE RIP RAP CLASS II	LTN			

Return to Search | Notify



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 to view detailed receipt information.

Activity Summary

Business Unit 50100 PO Status Compl
Purchase Order 0001186712 Supplier LL Carter & Son Inc
Supplier Location MAIN

Merchandise Amount 11,310.00 USD
Merchandise Receipt 11,357.51 USD
Merchandise Returned 0.00 USD
Merchandise Invoice 11,357.51 USD
Merchandise Matched 11,357.50 USD

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

Details Receipt Invoice Matched RTV

Line	Line Details	Item	Item Description	UOM	Qty epted	Open Quantity	Open Amount	Currency	
1		7503551310	STONE RIP RAP CLASS AI	LTN	1.2600	0.0000	0.000 USD		

Return to Search Previous in List Next in List Notify

Unit 50100 PO ID 0001186712 Line 1 Item ID 7503551310

Receipt Personalize | Find | View All | First 1-6 of 7 Last

Sched Num	BU Recv	Receipt No	Receipt Line	Status	Seq	Supp Rcpt Qty	Supp Reject Qty	Merchandise Amt	Currency		
1	50100	0002080647	1	Received	1	46.3100	0.0000	1745.890	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 to a **Voucher Inquiry** page where to view detailed voucher information.

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Review PO Information ▾ > Purchase Orders > Activity Summa

Activity Summary

Business Unit 50100 PO Status Compl
Purchase Order 0001186712 Supplier LL Carter & Son Inc
Supplier Location MAIN

Merchandise Amount 11,310.00 USD
Merchandise Receipt 11,357.51 USD
Merchandise Returned 0.00 USD
Merchandise Invoice 11,357.51 USD
Merchandise Matched 11,357.50 USD

Lines Personalize | Find | View All | [Print] [Refresh] First 1 of 1 Last

Details Receipt **Invoice** Matched RTV [More]

Line	Line Details	Item	Item Description	UOM	ed ity	Un-invoiced Amount	Currency	Invoice
1	[Icon]	7503551310	STONE RIP RAP CLASS AI	LTM	1000	0.000	USD	[Invoice Icon]

[Return to Search] [Previous in List] [Next in List] [Notify]

Unit 50100 PO No. 0001186712 Line 1 Item ID 7503551310

Invoice Personalize | Find | View All | [Print] [Refresh] First 1-6 of 7 Last

Sched Num	AP Unit	Voucher	Line	Quantity Invoiced	Amount Invoiced		
1	50100	00939183	1	46.5200	1753.800	+	-



Review Change History and Review Change Orders Pages

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

Both pages allow searching 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.

Navigate to the **Review Change History** page using the following path:

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

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

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

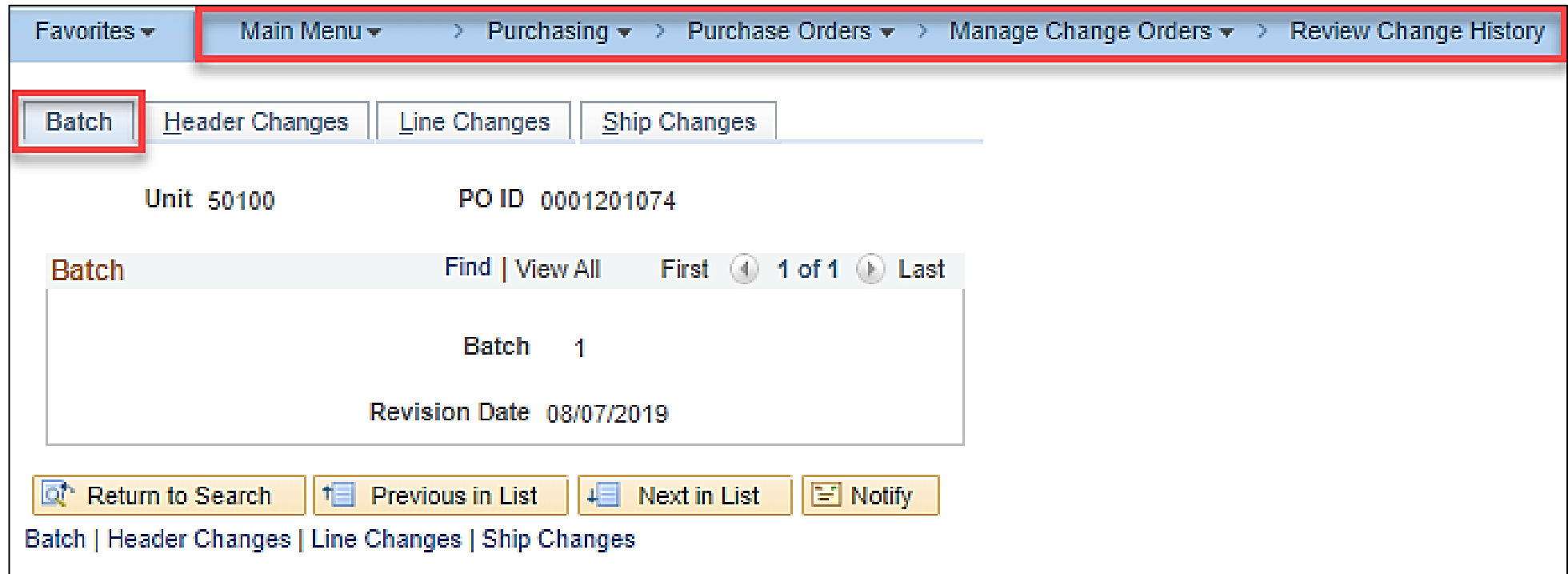
Enter the search criteria on either page and click **Search**.



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.



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

Batch Header Changes Line Changes Ship Changes

Unit 50100 PO ID 0001201074

Batch Find | View All First ◀ 1 of 1 ▶ Last

Batch 1
Revision Date 08/07/2019

Return to Search Previous in List Next in List Notify

Batch | Header Changes | Line Changes | Ship Changes



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.

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

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

Unit 50100 PO ID 0001201074

PO Header Personalize | Find | View All | [Print] [Refresh] First 1-3 of 3 Last

Batch	Seq	Description	Value		User Modify	Last Change Date
1	1	Billing Location	APPOMT ROS	OTHER	NINA.PATRICK	08/07/2019 12:33:33PM
1	1	Change Type	C	OTHER	NINA.PATRICK	08/07/2019 12:33:33PM
1	1	PO Status	A	OTHER	NINA.PATRICK	08/07/2019 12:33:33PM

Return to Search Previous in List Next in List Notify

Batch | Header Changes | Line Changes | Ship Changes



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.

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

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

Unit 50100 PO ID 0001201074

Changes to PO Lines Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Line	Batch	Seq	Description	Value	User Modify	Last Change Date
1	0	0				

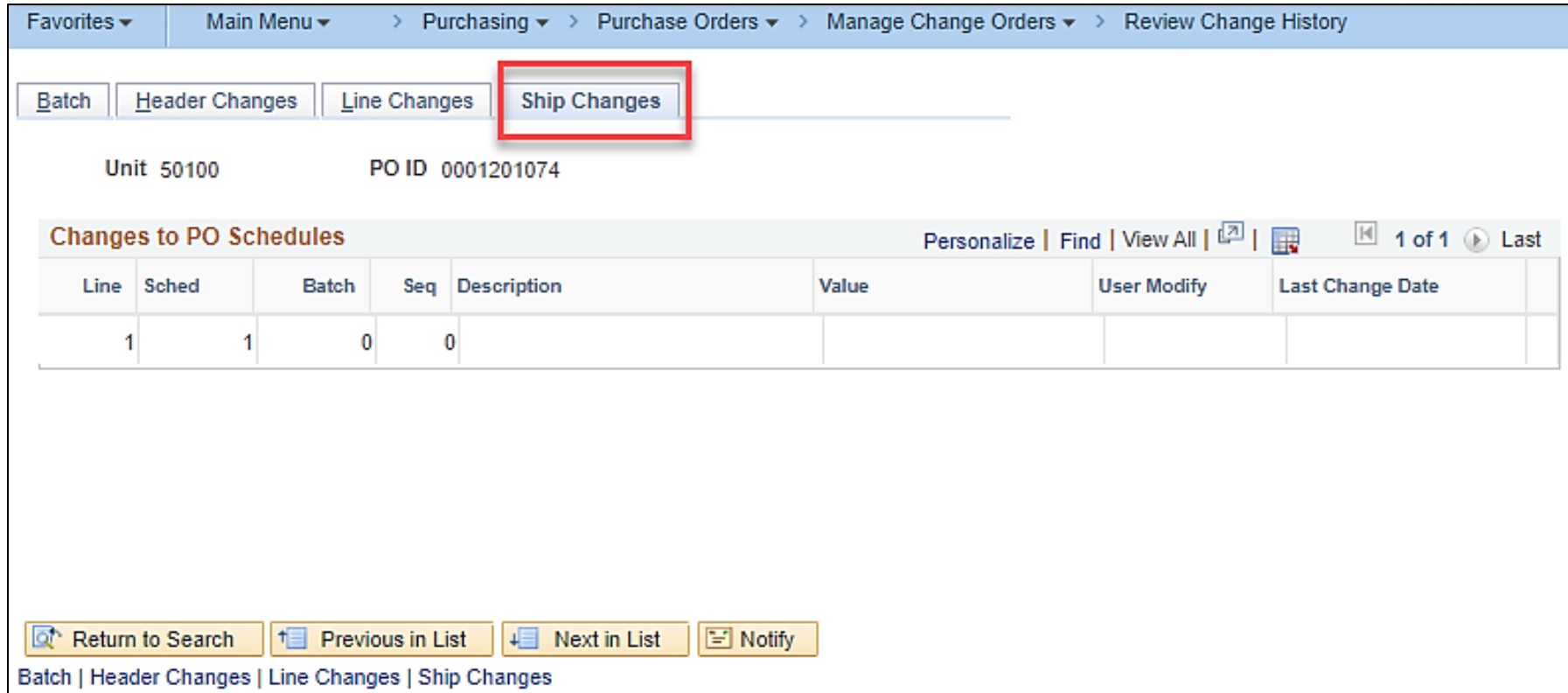
[Return to Search](#) [Notify](#)

Batch | Header Changes | Line Changes | Ship Changes



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.



The screenshot shows the 'Review Change History' page with the 'Ship Changes' tab selected. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change History. Below the breadcrumb trail are tabs for 'Batch', 'Header Changes', 'Line Changes', and 'Ship Changes' (which is highlighted with a red box). The page displays 'Unit 50100' and 'PO ID 0001201074'. Below this is a section titled 'Changes to PO Schedules' with a toolbar containing 'Personalize', 'Find', 'View All', and navigation icons. A table with the following columns is shown: Line, Sched, Batch, Seq, Description, Value, User Modify, and Last Change Date. The table contains one row with values: Line 1, Sched 1, Batch 0, Seq 0. At the bottom of the page are buttons for 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. A breadcrumb trail at the very bottom reads: Batch | Header Changes | Line Changes | Ship Changes.

Unit 50100 PO ID 0001201074

Changes to PO Schedules Personalize | Find | View All | 1 of 1 Last

Line	Sched	Batch	Seq	Description	Value	User Modify	Last Change Date
1	1	0	0				

Return to Search Previous in List Next in List Notify

Batch | Header Changes | Line Changes | Ship Changes



Lesson 5: Summary

5

Review PO Information, History, and Activities

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.



Course Summary

PR344

Processing Purchase Orders

In this course, you learned:

- 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



Course Evaluation

Congratulations! You successfully completed the **501 PR344: Processing Purchase Orders** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.





Appendix

- Key Terms
- Flowchart Key



Key Terms



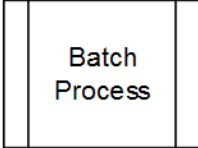
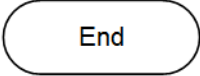
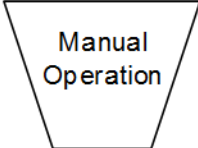
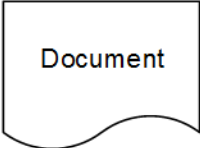
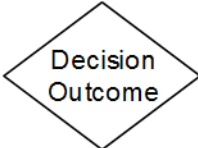
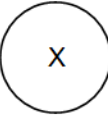
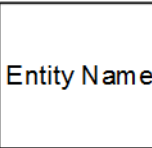
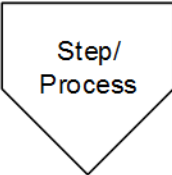
Change Order: A change order is created when you make a change to a PO that affects the **Quantity, Price,** or **Ship To** fields or when a **Line** is added.

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

	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 preformed manually.		Depicts a document of any kind, either electronic or hard 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.