Purchase Orders Overview

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

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

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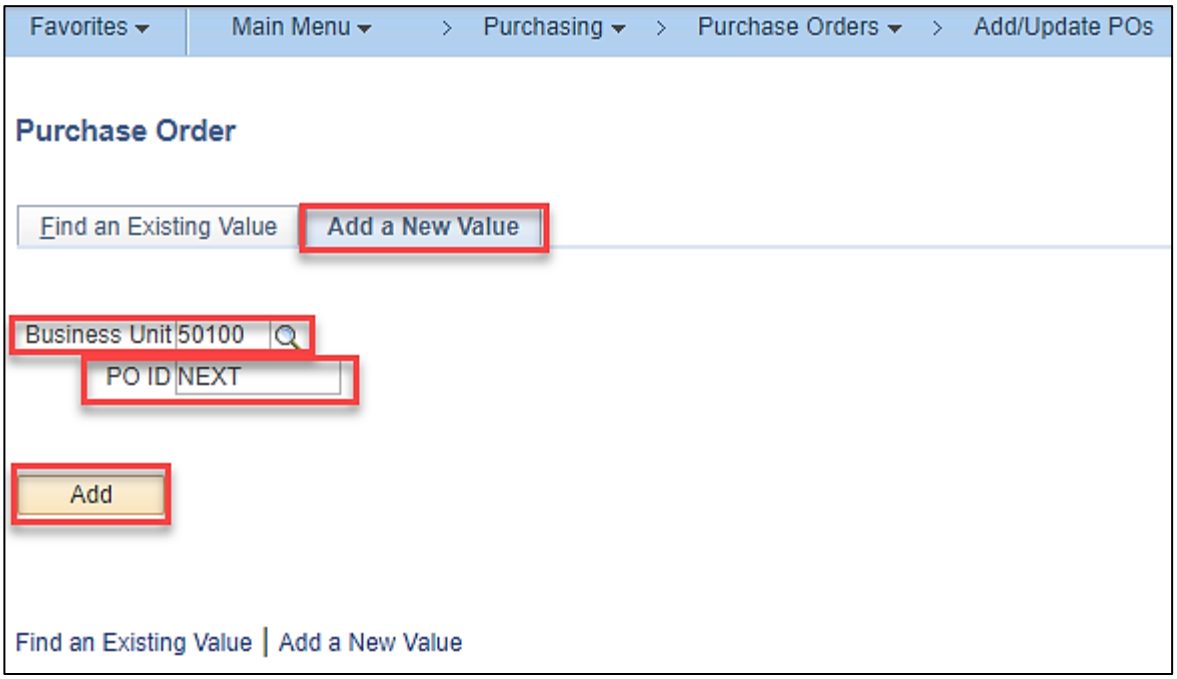
Create a New Purchase Order (PO): Beginning Steps for All POs

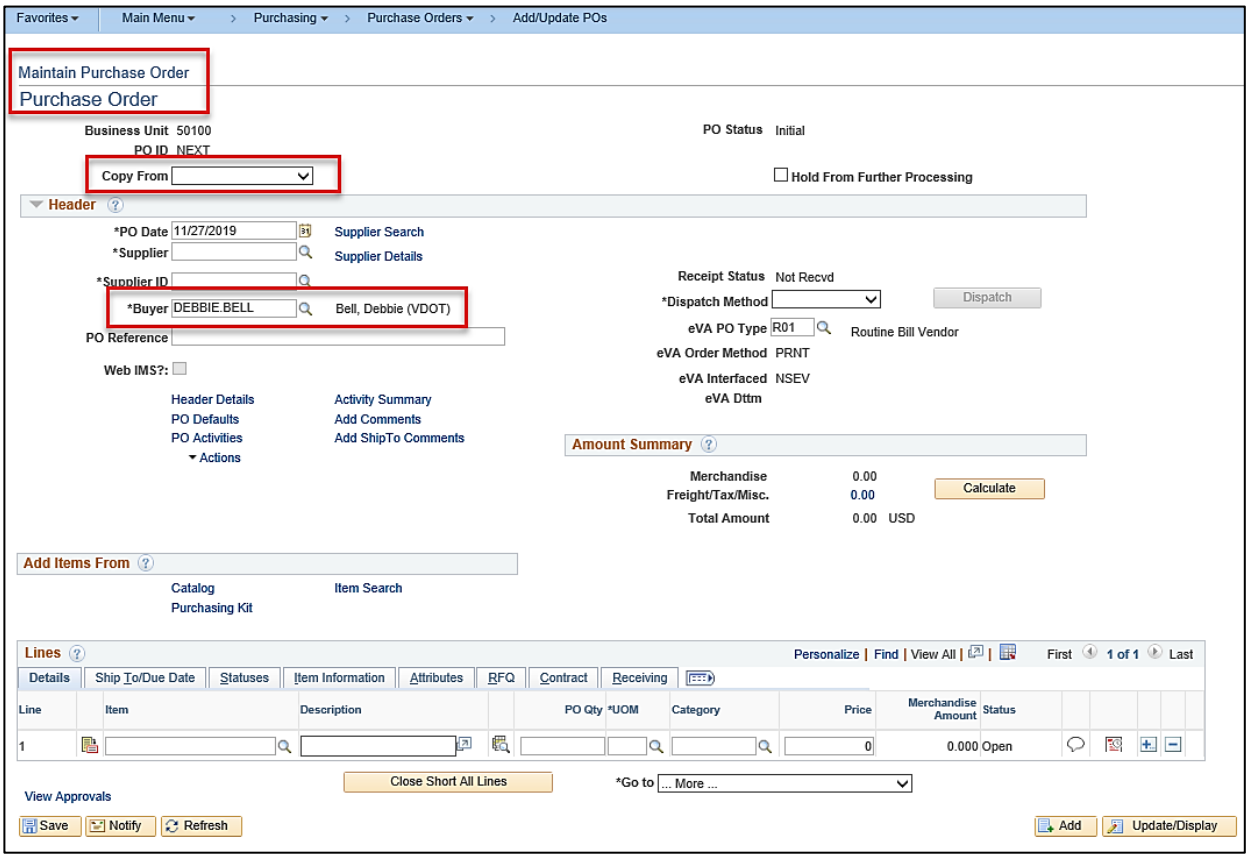
1. Navigate to the **Purchase Order** search page using the following path:

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

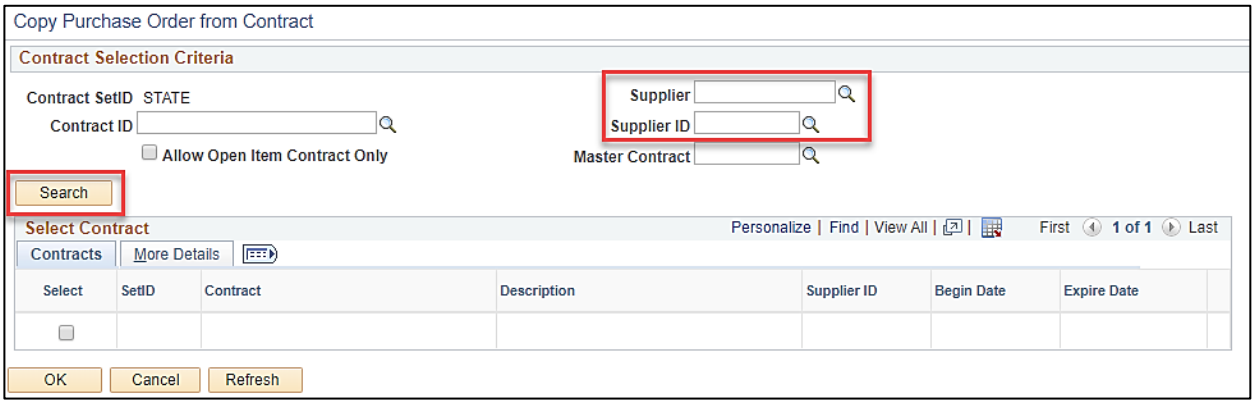


2. Select the **Add a New Value** tab:
3. Business Unit: 50100
4. **PO ID**: **NEXT** and should not be changed. Cardinal assigns a **PO ID** number when you successfully save the PO.
5. Click the Add button. The Maintain Purchase Order – Purchase Order page displays.

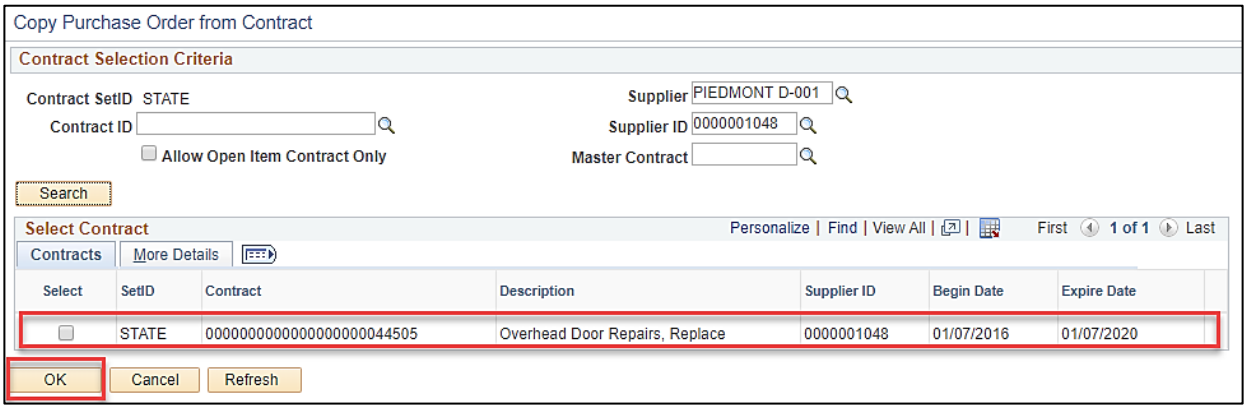
Create a PO (All Items) from a Contract



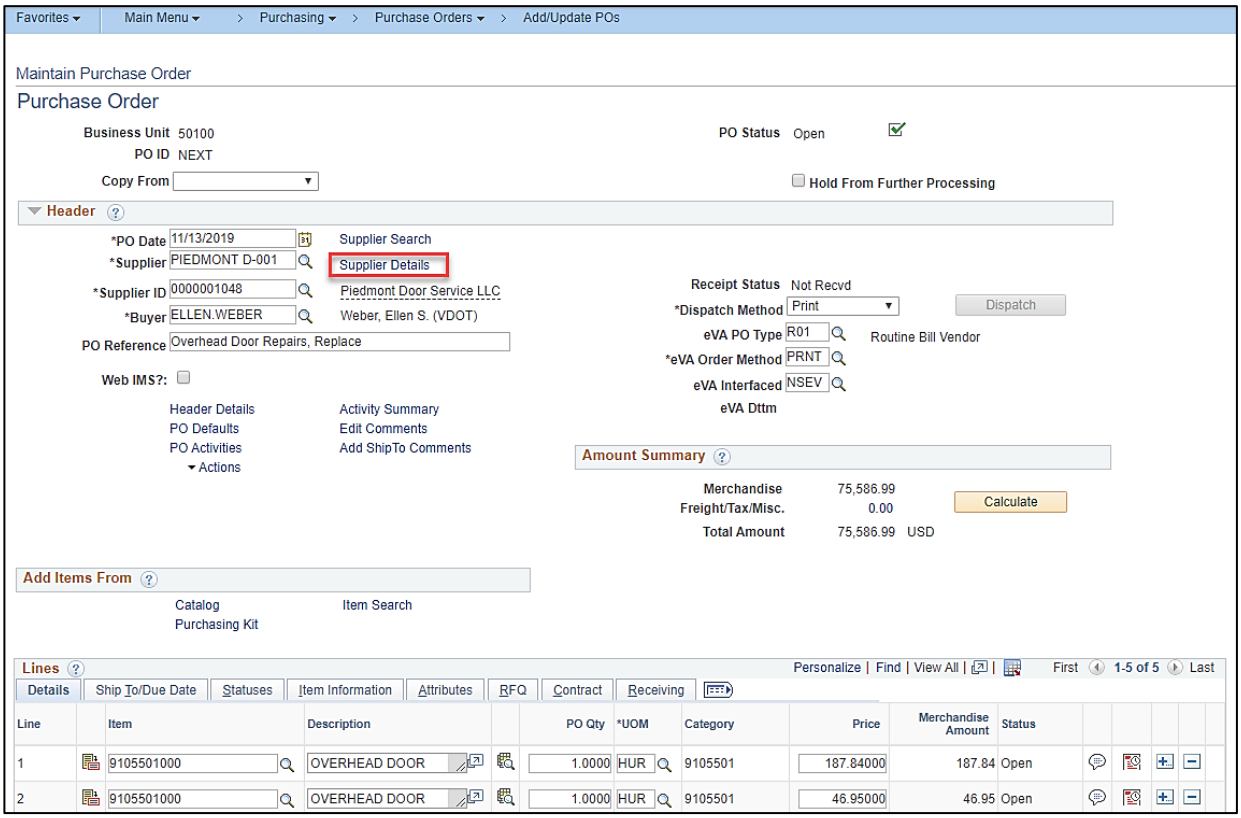
1. Follow steps 1-3 from the [Create a New Purchase Order (PO): Beginning Steps for All POs](#) section of this job aid.
2. Click the **Copy From** drop-down arrow and select **Contract**. The **Copy Purchase Order from Contract** pop-up window displays.



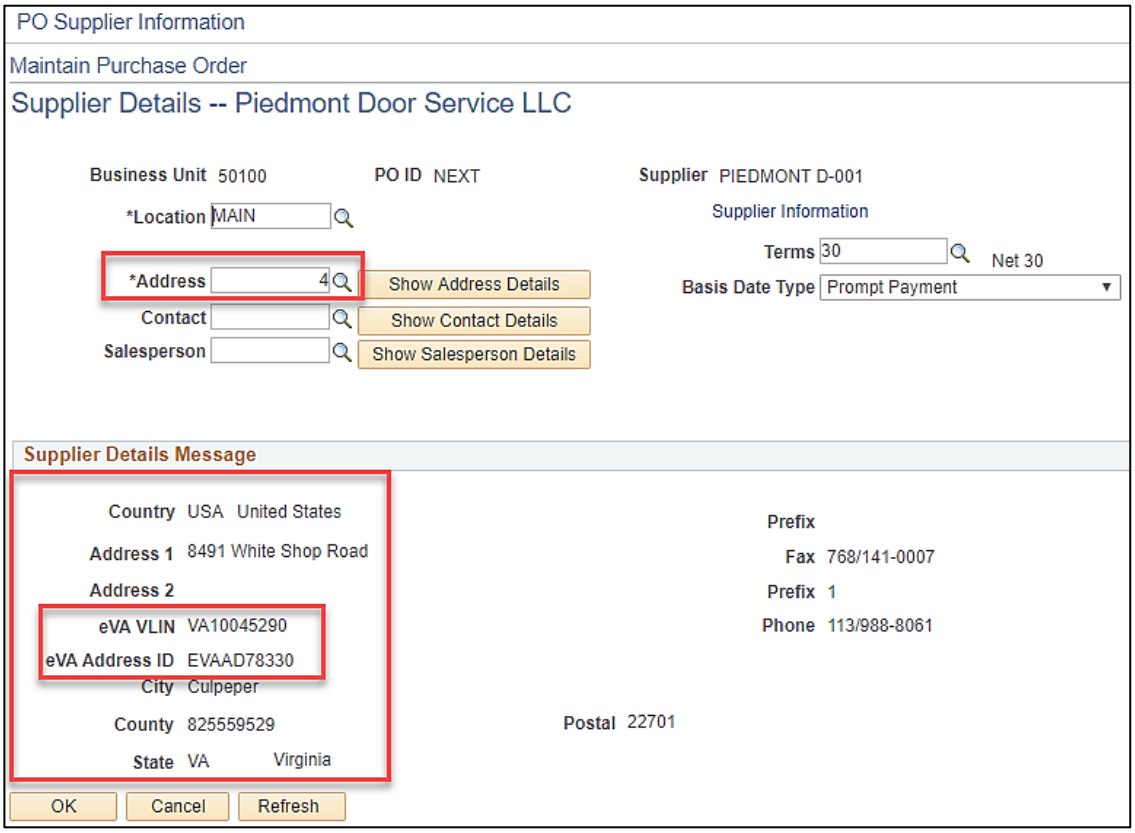
3. Enter the **Supplier** or **Supplier ID**. You can use the magnifying glass icons to search.
4. Click the **Search** button to initiate the search for contracts related to the selected supplier.



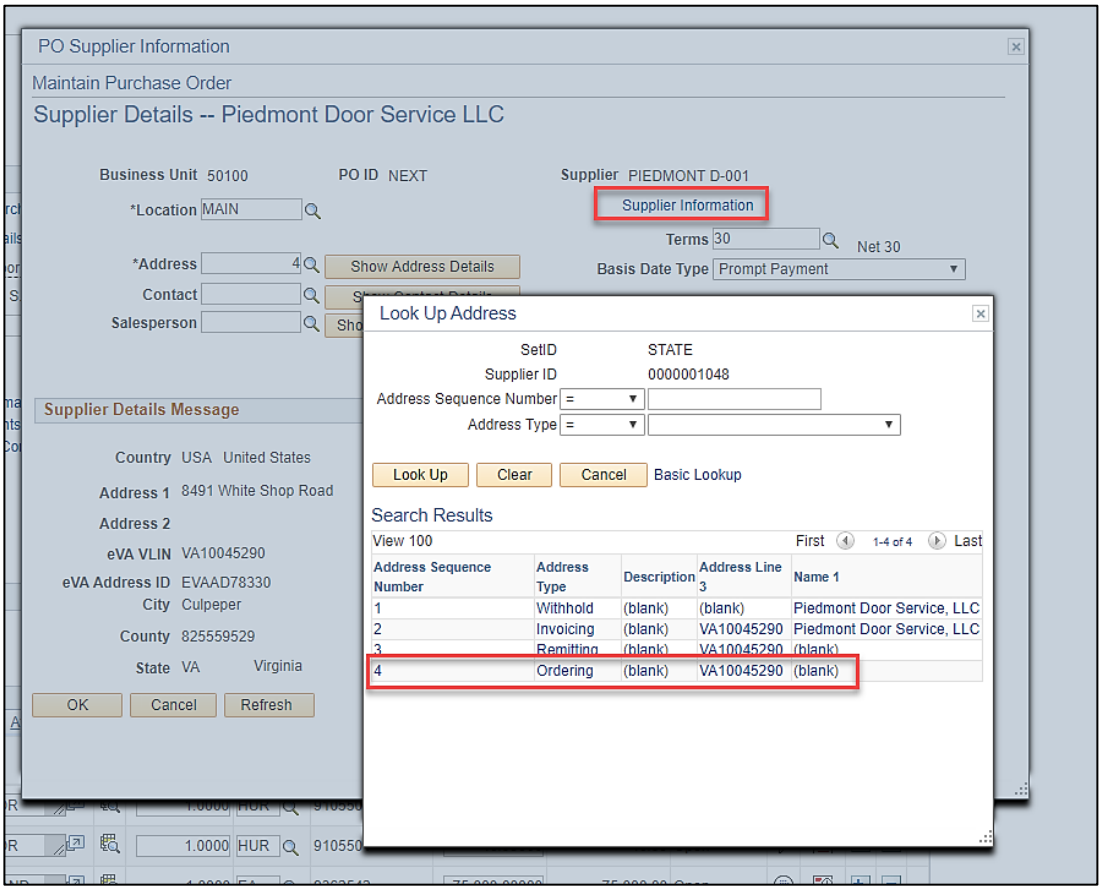
5. All contracts for the selected supplier display as shown.
6. Click the **Select** check-box to the left of the desired **Contract** to copy from this contract.
7. Click the **OK** button. The **Purchase Order** page with all contract items copied in displays.



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

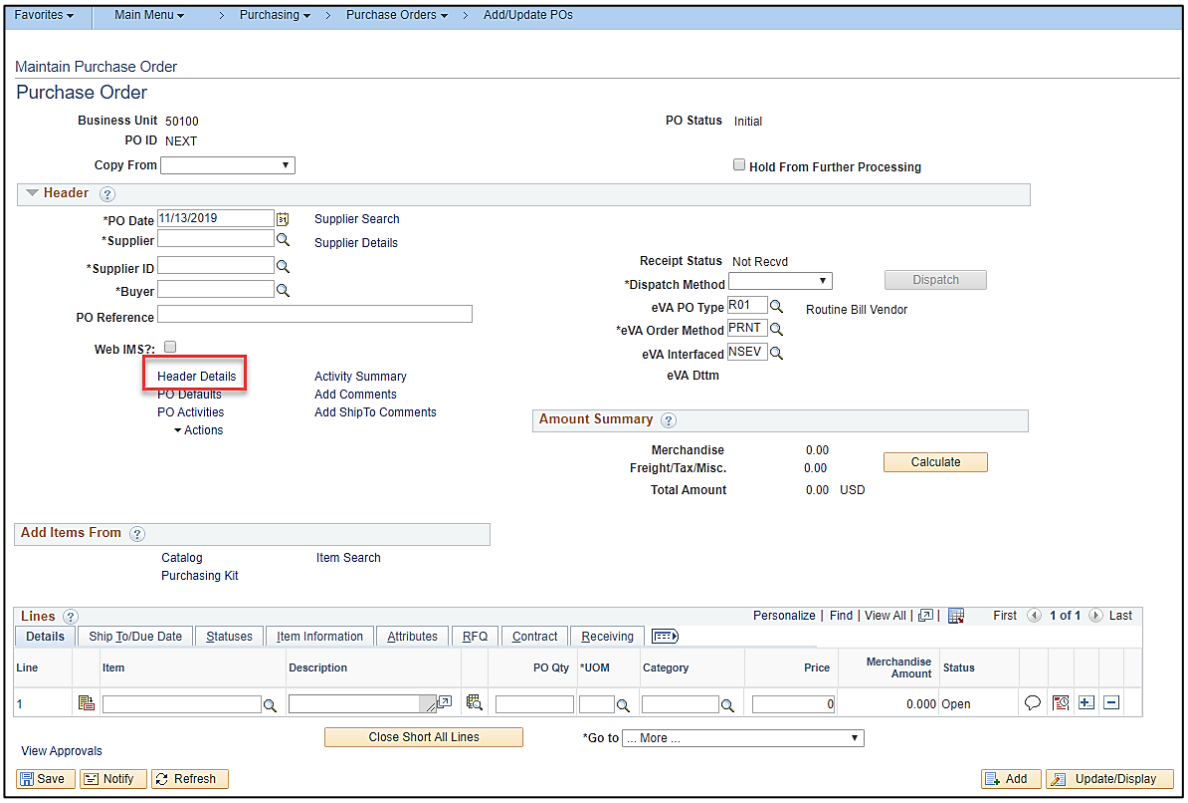


9. The default order address displays in the **Supplier Details** pop-up window.
10. The eVA Supplier Location ID # (**eVA VLIN**), related to the chosen address, also displays.
11. To select a different address, click the **Look up Address** magnifying glass icon.

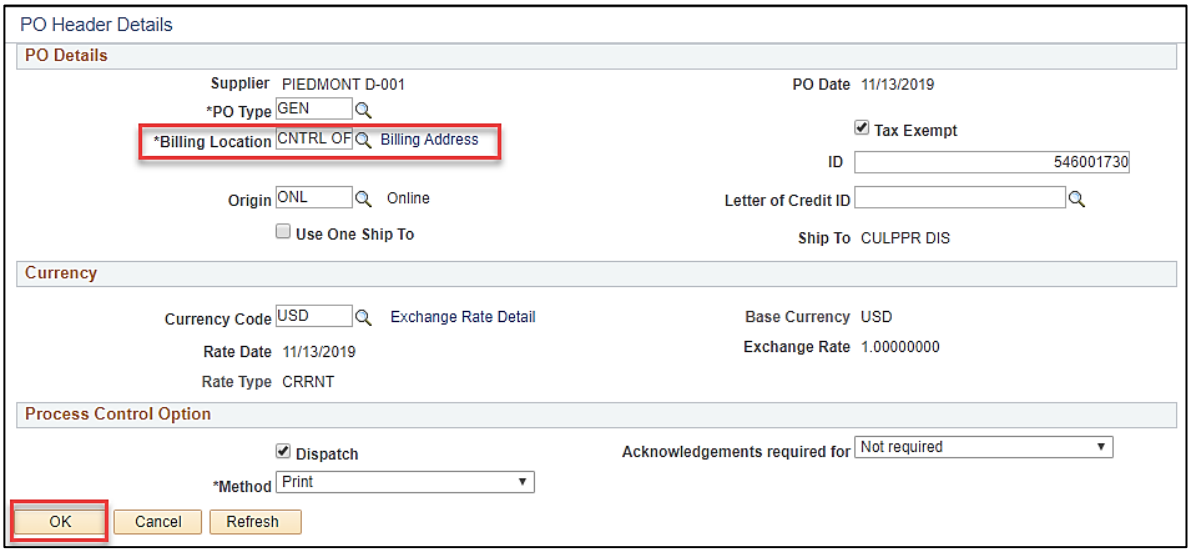


12. Click the **Address Sequence Number** related to the address you wish to select.s
13. On the **Supplier Details – XXX** pop-up window be sure to click the **OK** button once you have made your changes. The window will close and you will be back on the **Purchase Order** page.
14. However, if you need additional supplier details, click the **Supplier Information** hyperlink.
15.

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

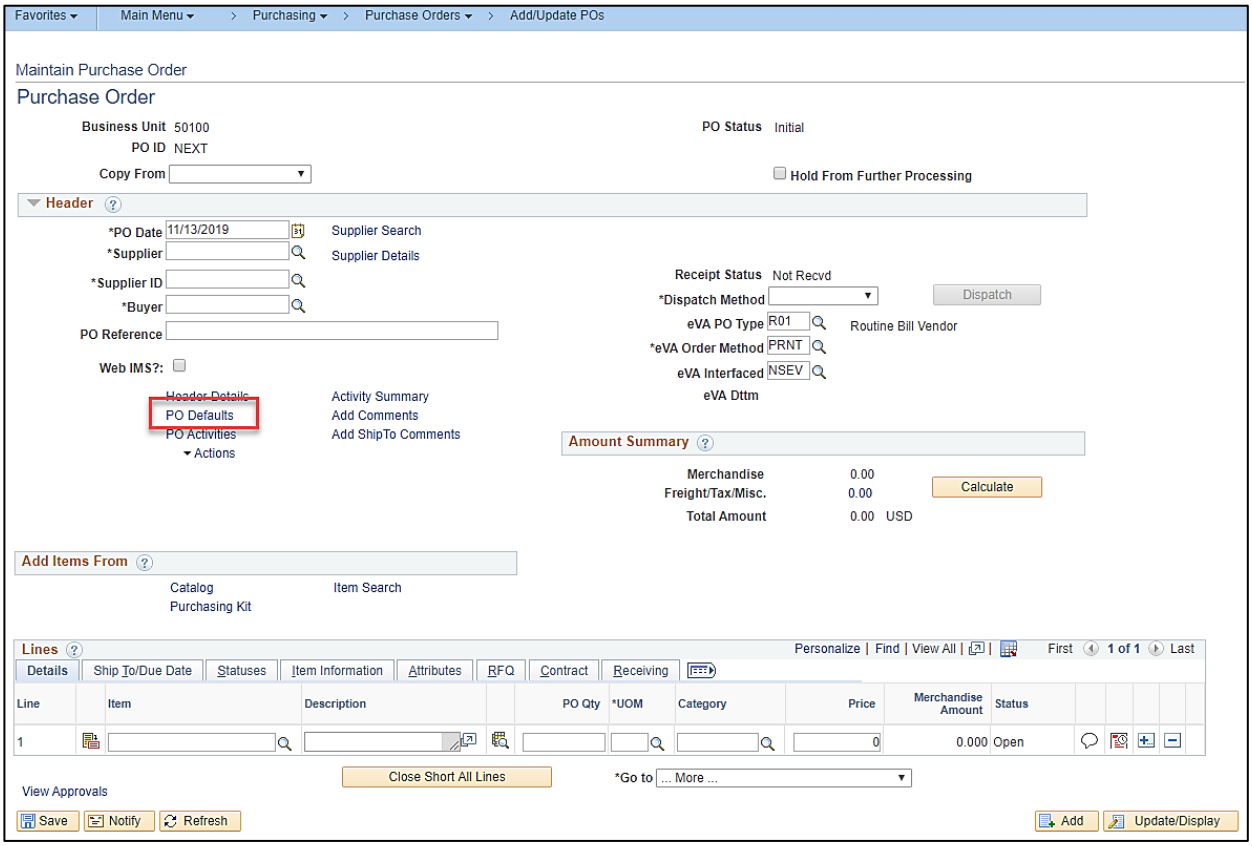


19. Click the **Header Details** hyperlink.

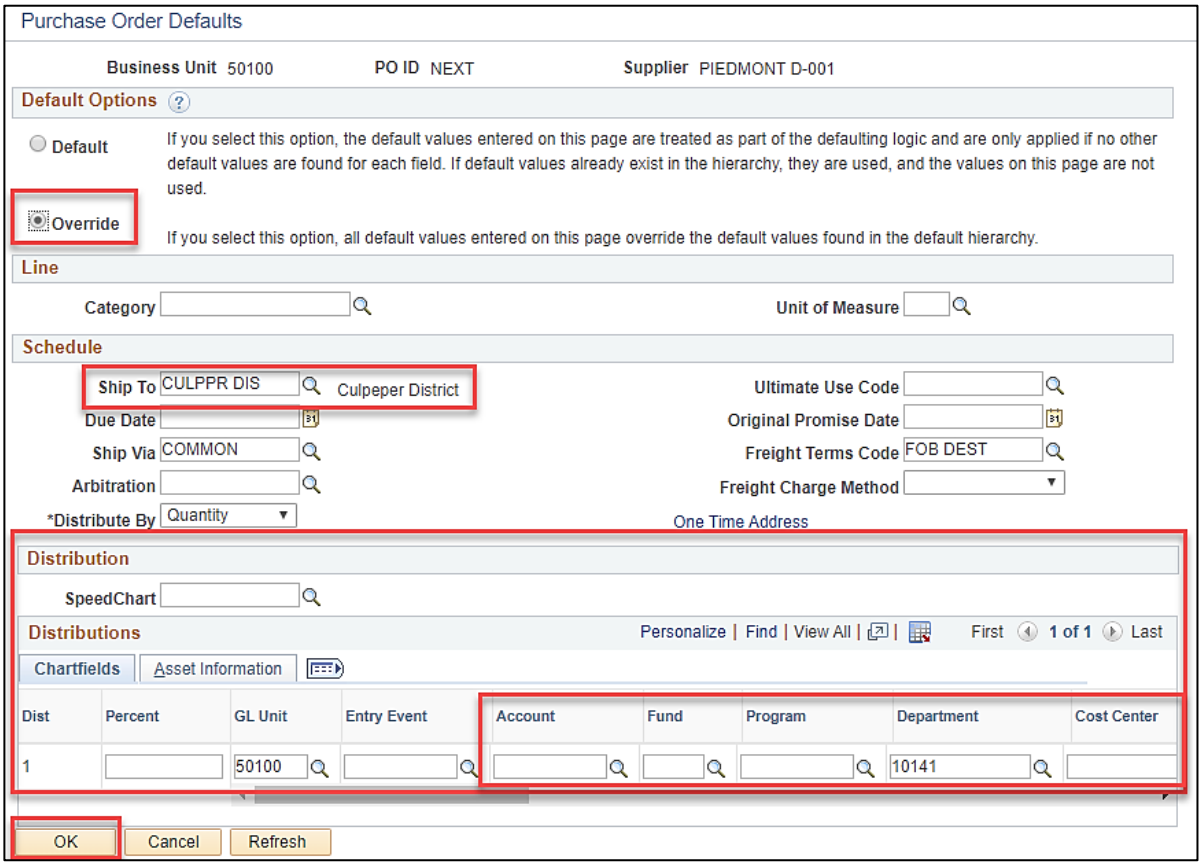


20. The **PO Header Details** pop-up window displays. Click the **Look up Billing Location** magnifying glass icon and select the **Location Code** for your **Billing Location**.

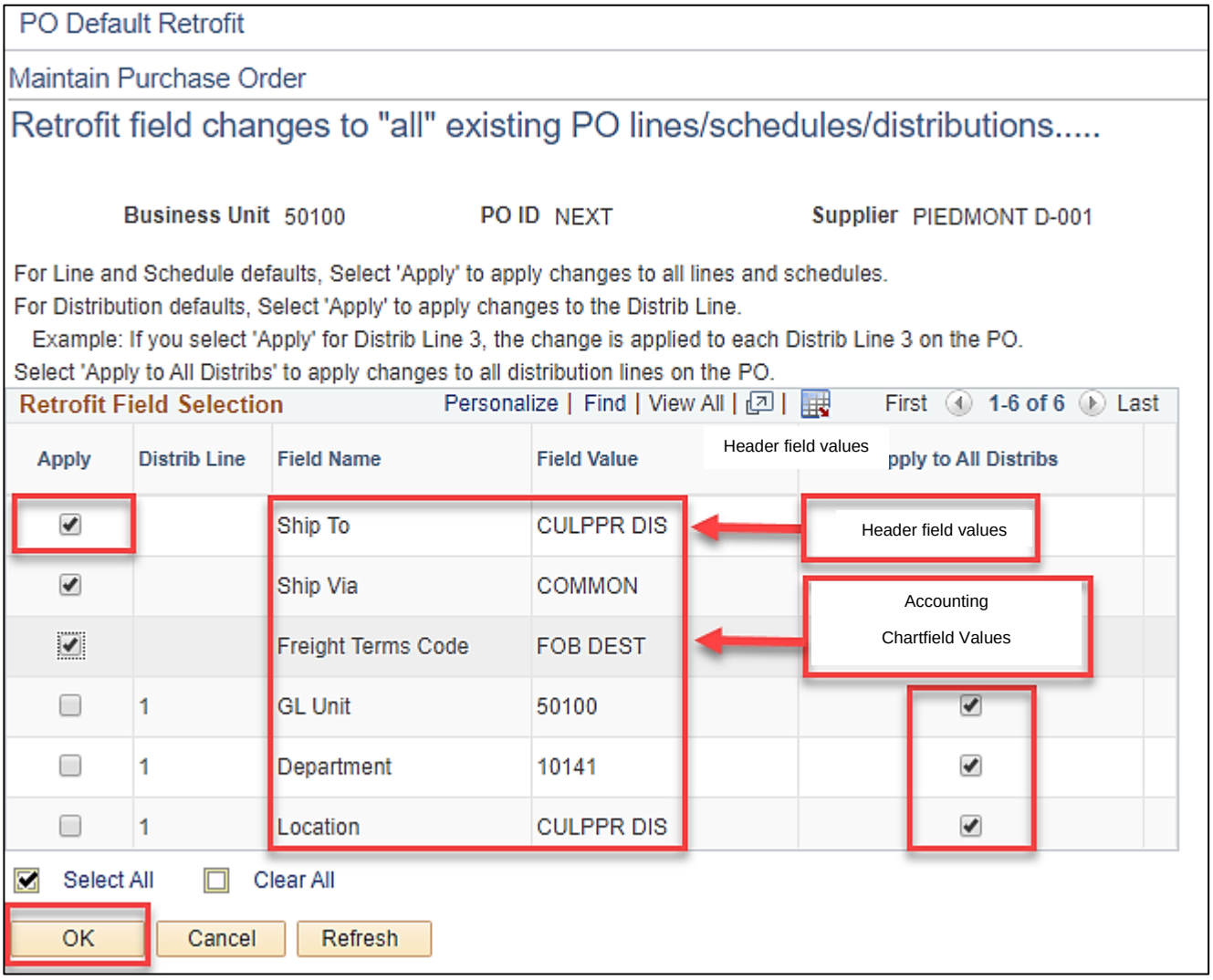
21. Click the OK button. The Maintain Purchase Order – Purchase Order page displays.



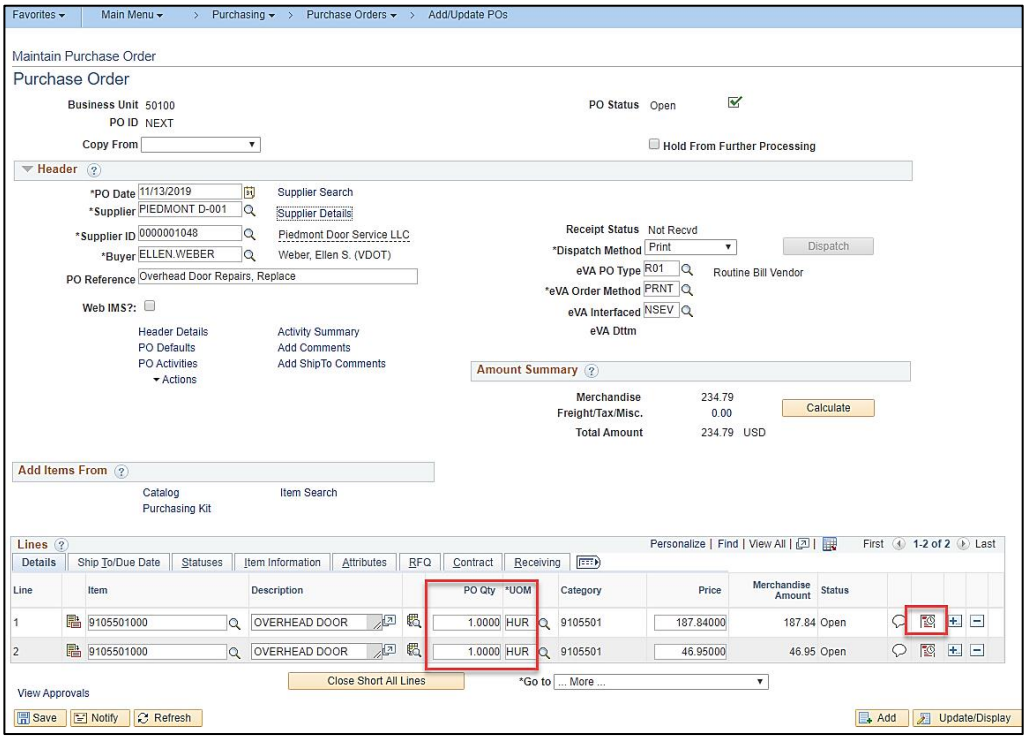
22. Click the **PO Defaults** hyperlink to make global changes to the header and accounting distribution field values for all lines. The **Maintain Purchase Order – Purchase Order Defaults** pop-up window displays.



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

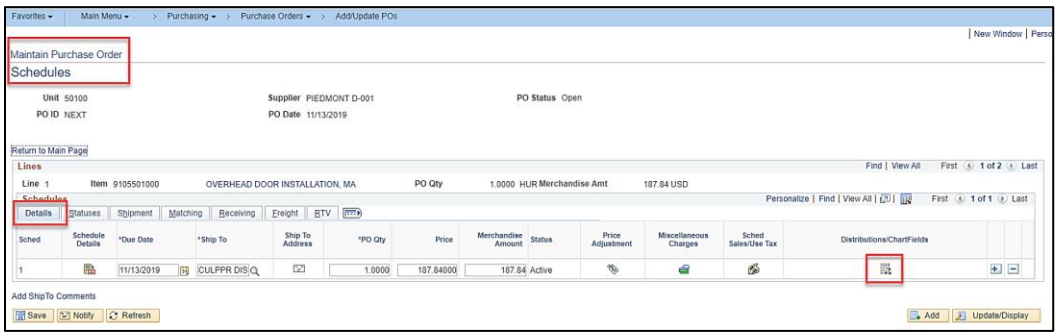


27. To the left of the header field values you are updating, select/click the **Apply** check-box.
28. To the right of the accounting ChartField values, select/click the check-boxes **Apply to All Distribs**, to ensure all the accounting distribution lines are updated with the new values from the prior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

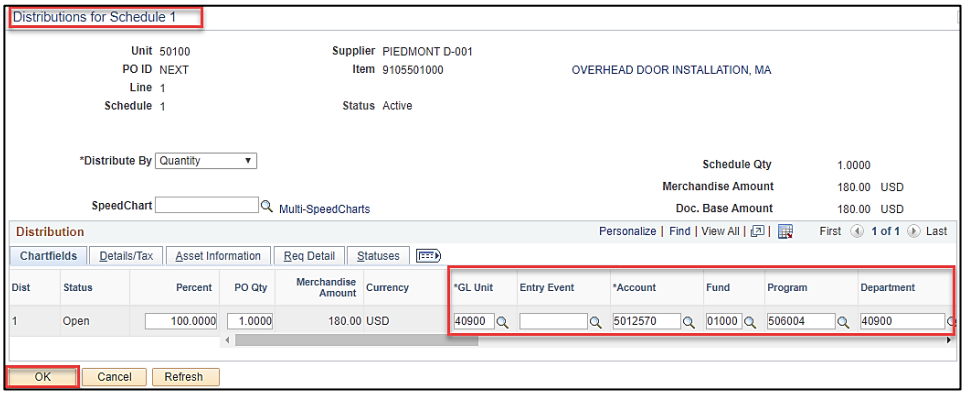


30. Enter the PO quantity (**PO Qty**) for each line.

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

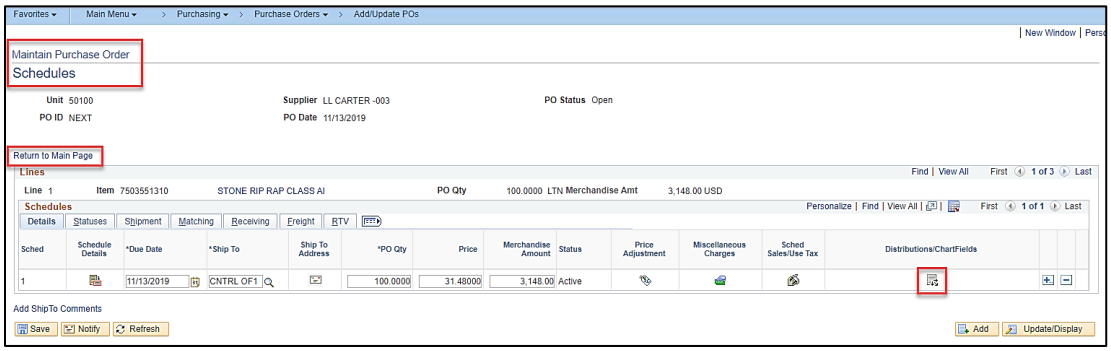


32. From the **Details** tab, click the **Distribution/ChartFields** icon. The **Distributions for Schedule X** pop-up window displays.

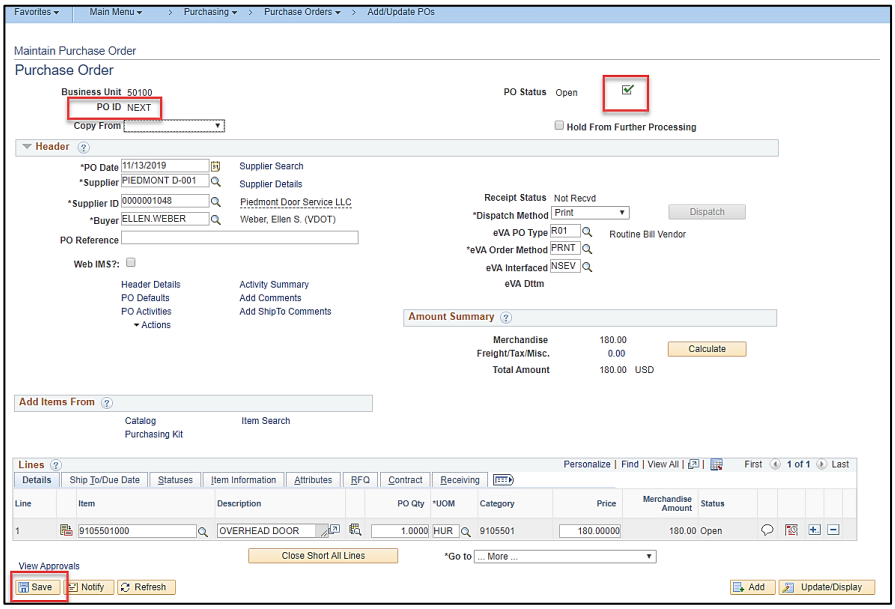


33. Verify or update the accounting distribution.

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

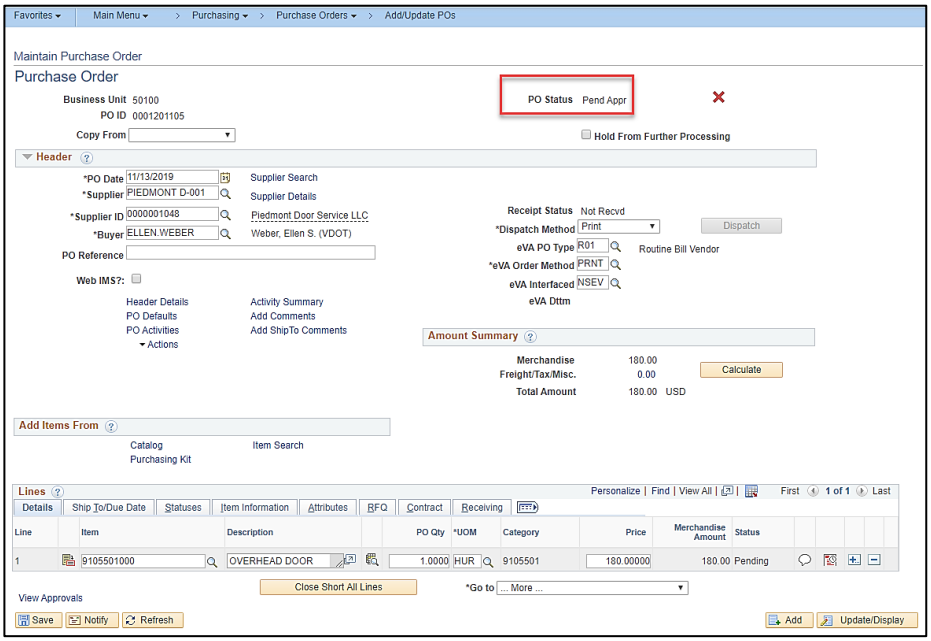


35. Click the **Return to Main Page** hyperlink. The **Purchase Order** page displays.



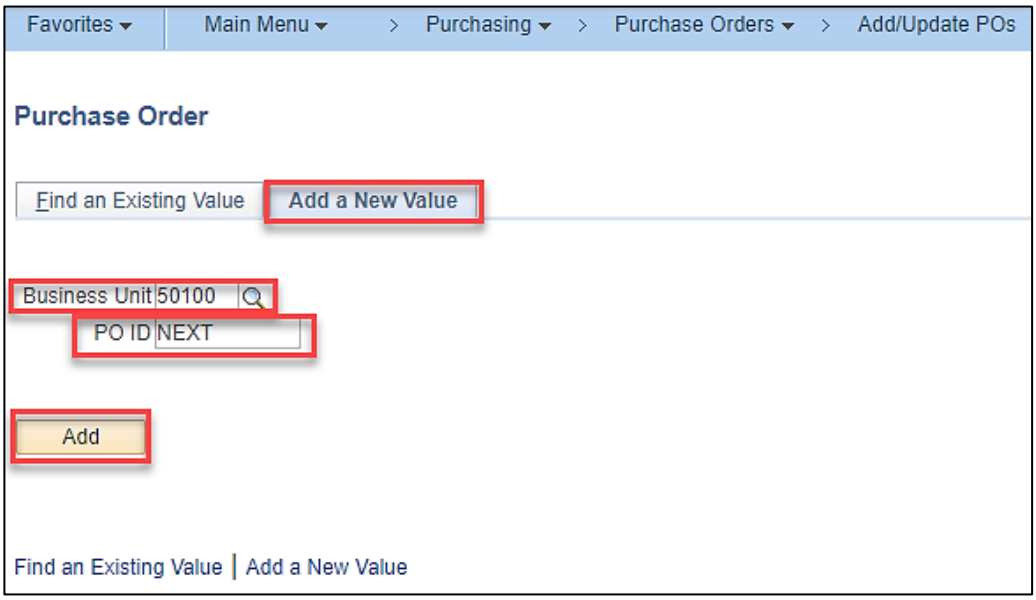
36. Click the **Save** button. Cardinal assigns the **PO ID** number when you successfully save the PO.

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

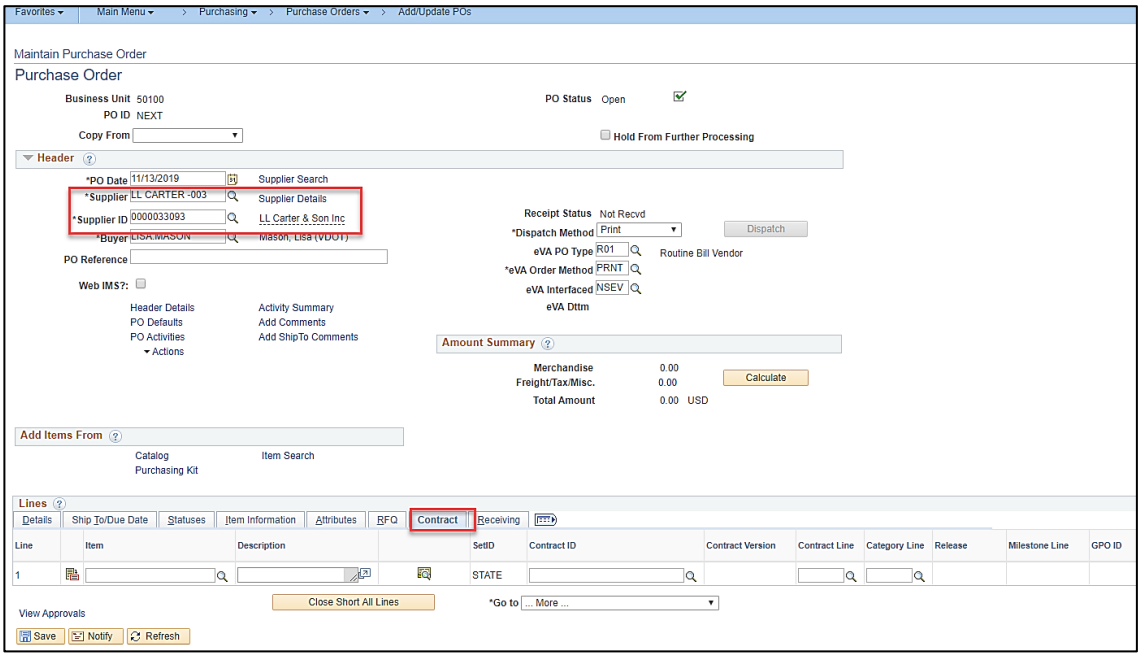


38. The green checkmark will disappear and **PO Status** changes to **Pend Appr**. Your supervisor will be notified of the pending approval via email and their worklist.

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

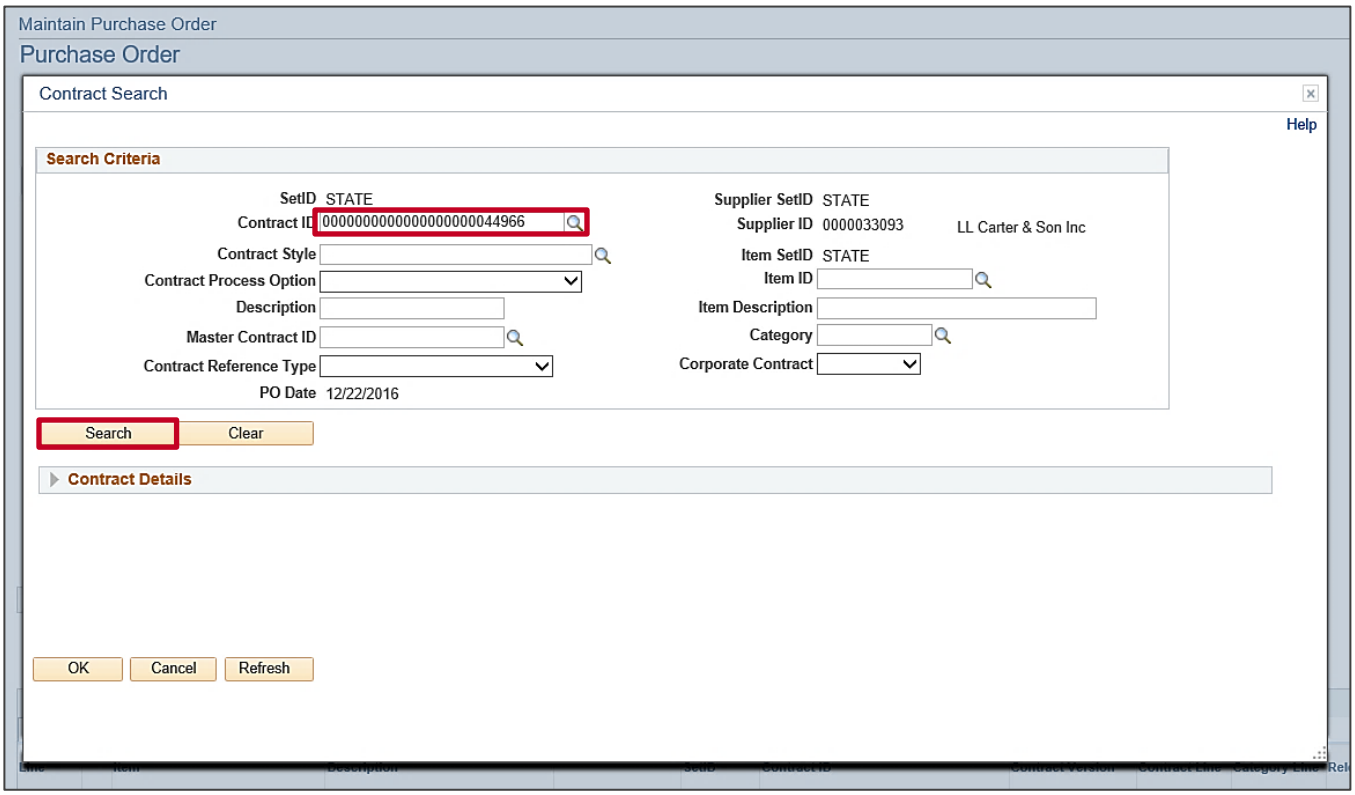


1. Repeat steps 1-3 from the [Create a New Purchase Order (PO): Beginning Steps for All POs](#) section of this job aid.

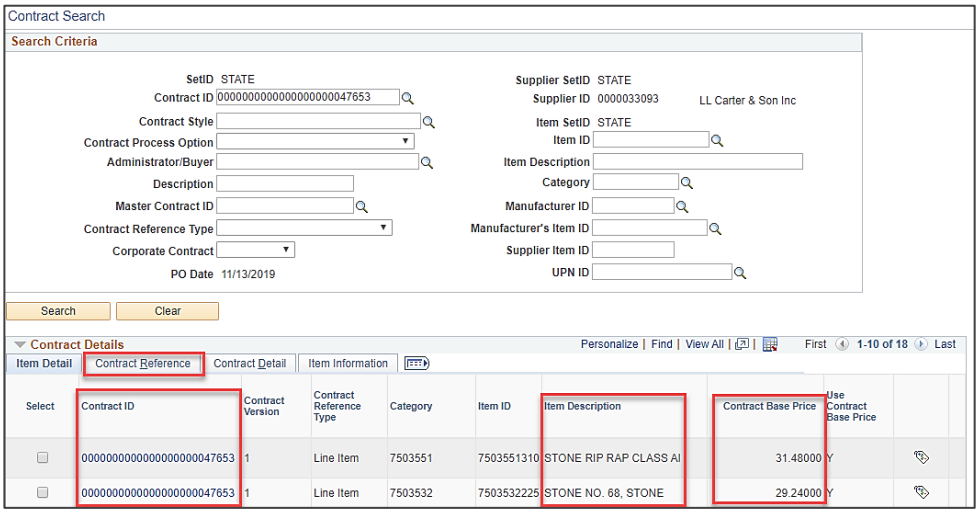


2. Enter the **Supplier** or **Supplier ID**. You can use the magnifying glass icons to search.
3. Click the **Contract** tab.

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

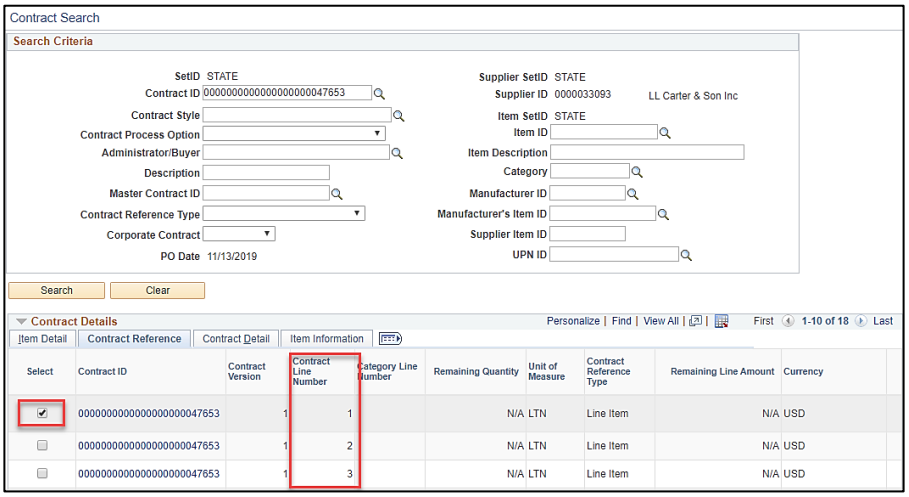


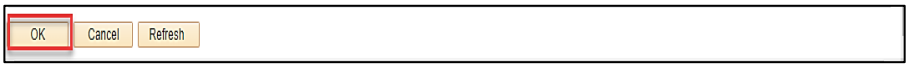
5. Enter a specific **Contract ID** number, or use magnifying glass icon if necessary.
6. Click the **Search** button to initiate the search for lines related to the selected contract.



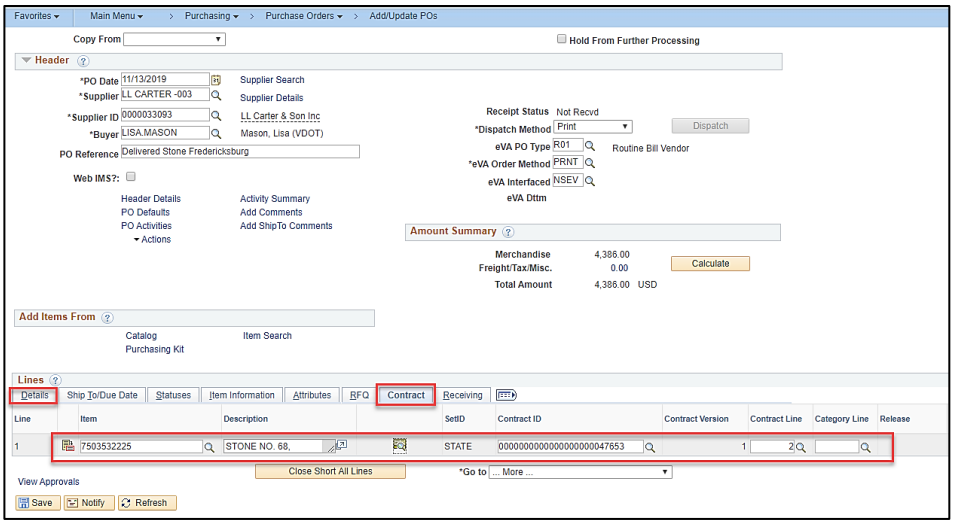
7. The **Item Detail** tab displays and contains **Contract ID**, **Item Description**, and **Contract Base Price** for each line of the selected contract.

8. Click the Contract Reference tab.

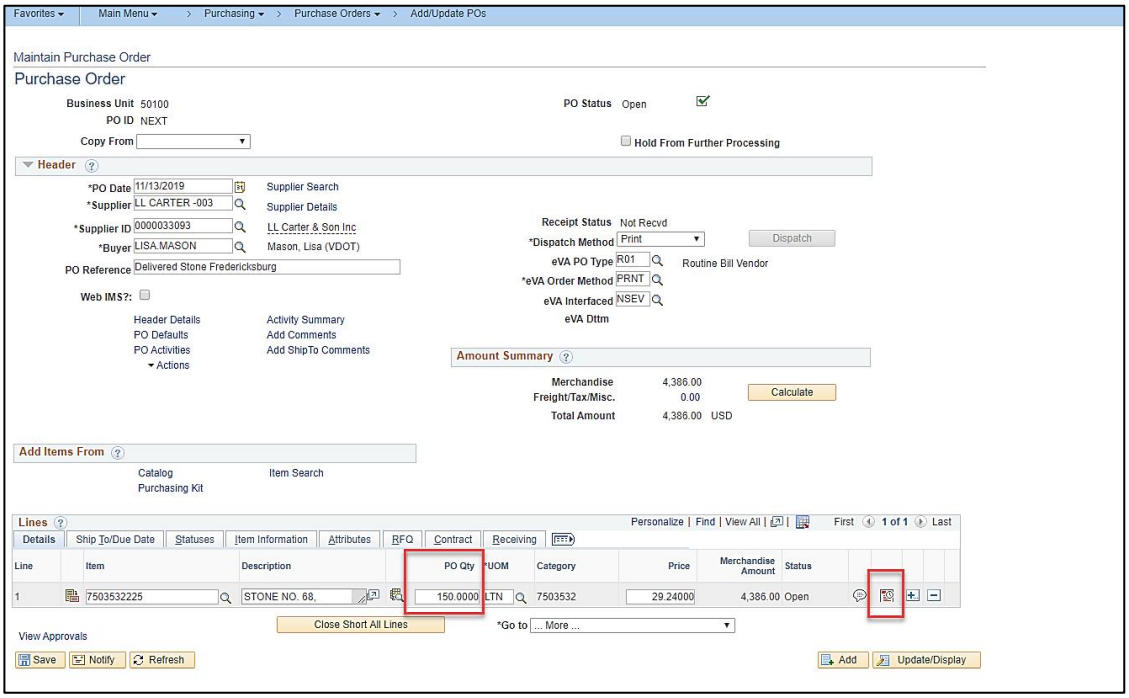




9. Each unique contract **Item Line Number** displays for the selected contract.
10. Click the **Select** check-box for the line you wish to copy. You may repeat the copy steps to copy more lines.
11. Click the OK button. The Maintain Purchase Order – Purchase Order page displays.

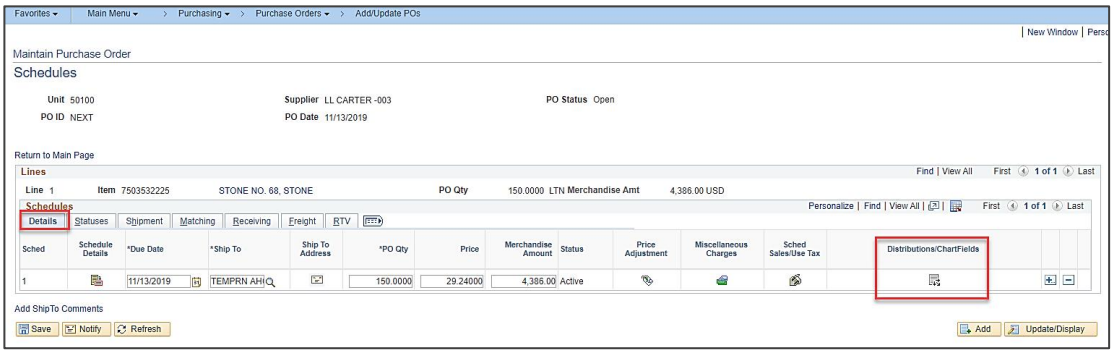


12. On the **Contract** tab you see that the **Line** you selected from the contract has populated your PO.
13. Click the **Details** tab.

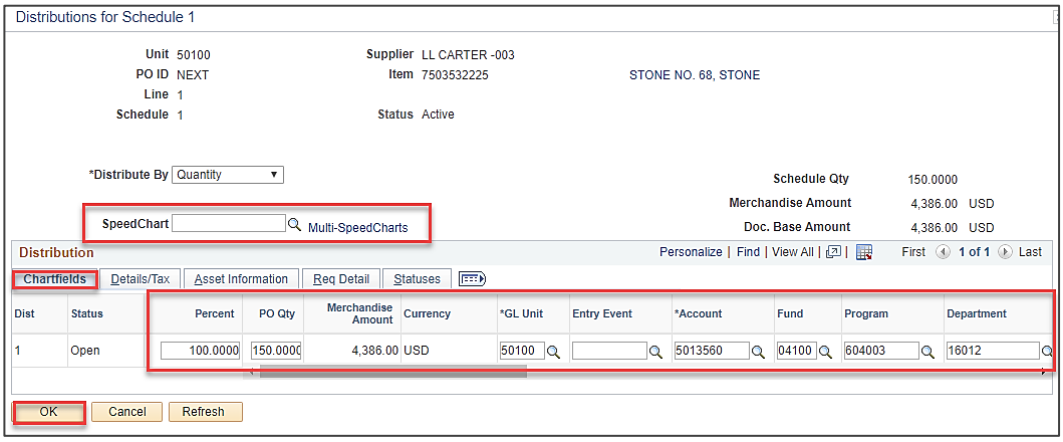


14. On the **Details** tab, enter the **PO Qty** (quantity) desired for this PO.

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



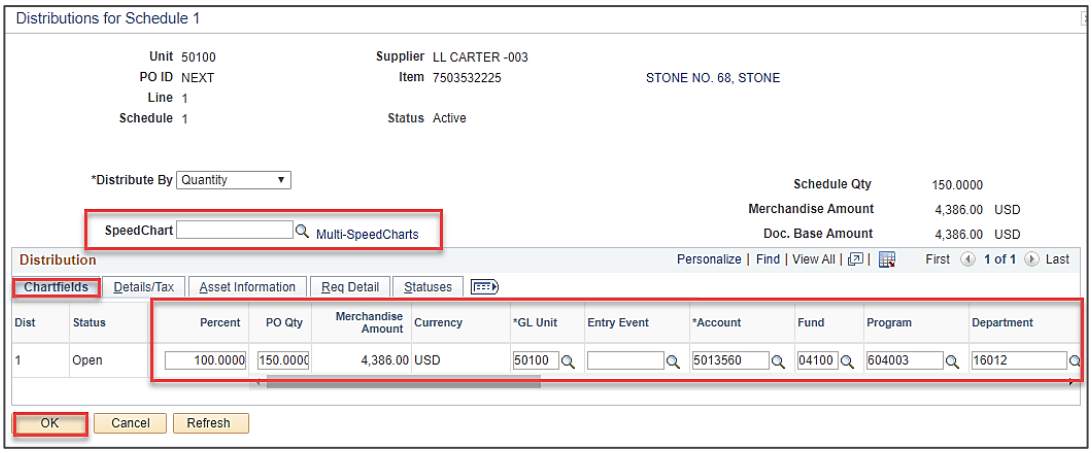
16. From the Details tab on the Maintain Purchase Order – Schedules page, click the Distribution icon. The Maintain Purchase Order – Distributions for Schedule X pop-up window displays.



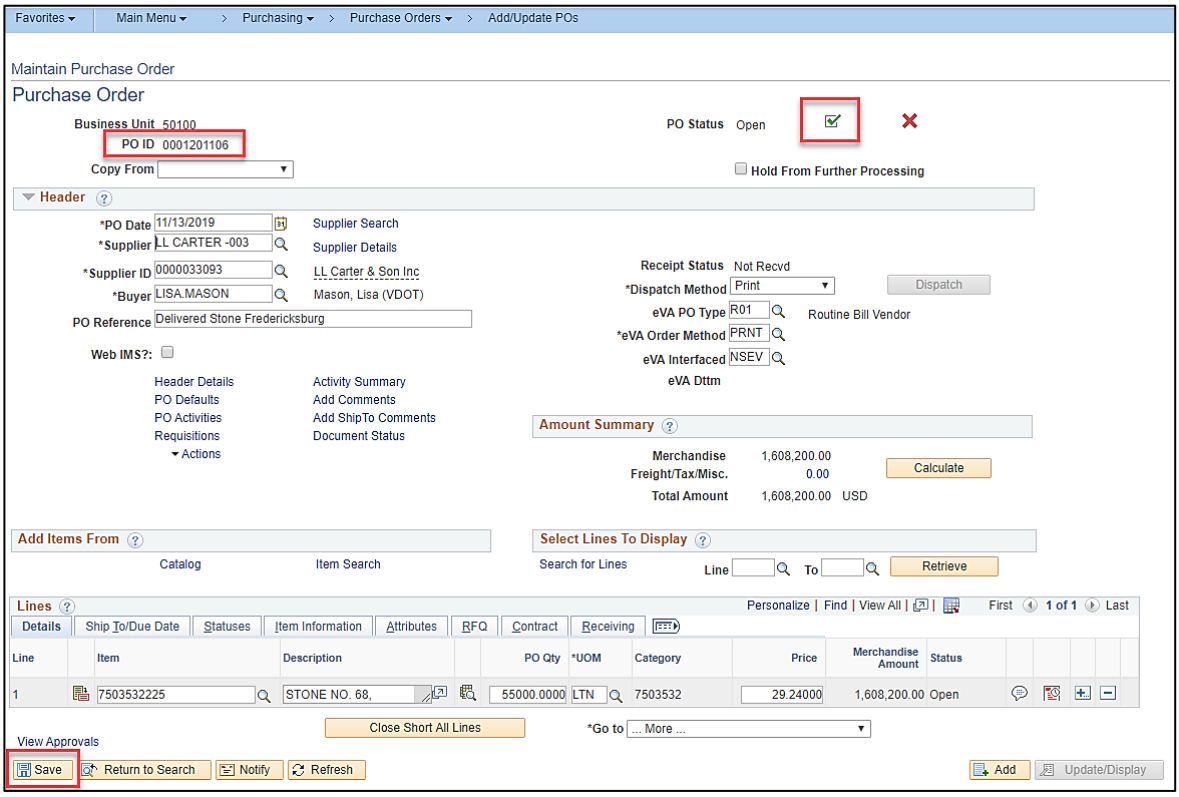
17. On the **Chartfields** tab enter the valid chart of accounts values. A **Schedule** may have one or more ChartField distributions. ChartField values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center**, or **Project** values is required. You can manually enter a ChartField value, or you may use the **Multi-SpeedCharts** hyperlink to select a **SpeedChart** value to automatically populate some of the ChartField values for you.

18. You may insert, or delete, additional accounting distributions, by scrolling right and clicking on the (**+**)/(**–**) icons at the end of the accounting distribution line.

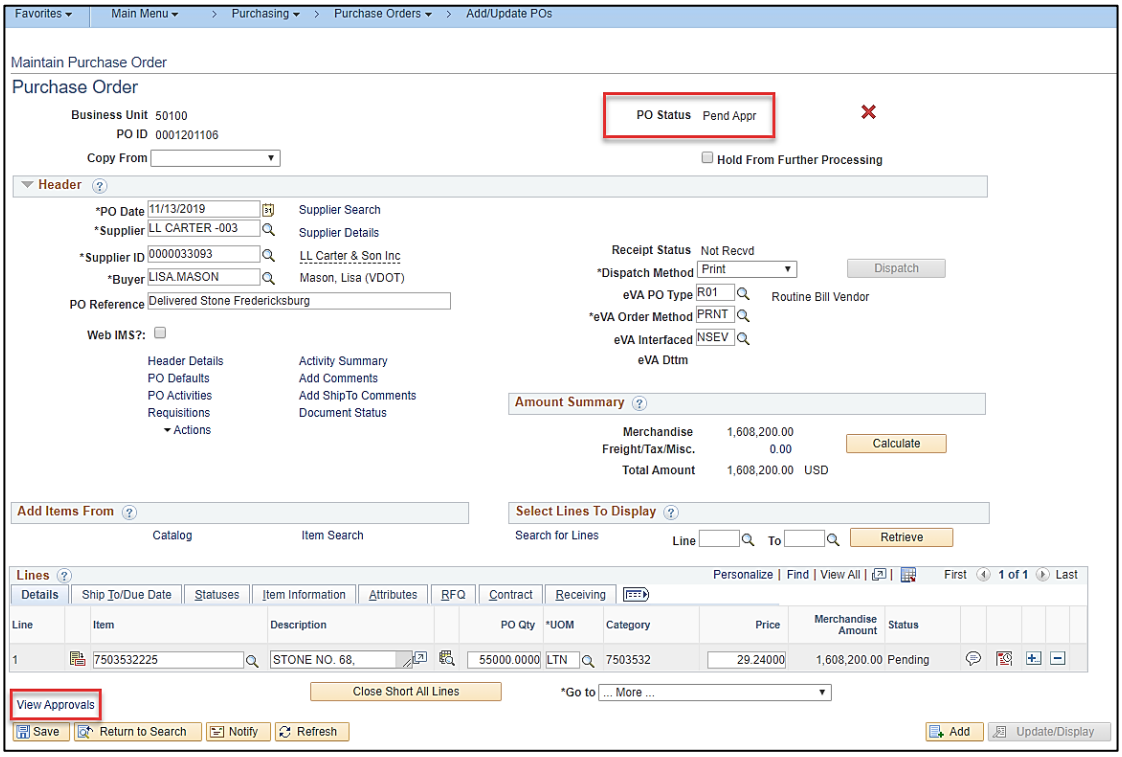
19. Click the **OK** button. You will return to the **Maintain Purchase Order – Schedules** page.



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



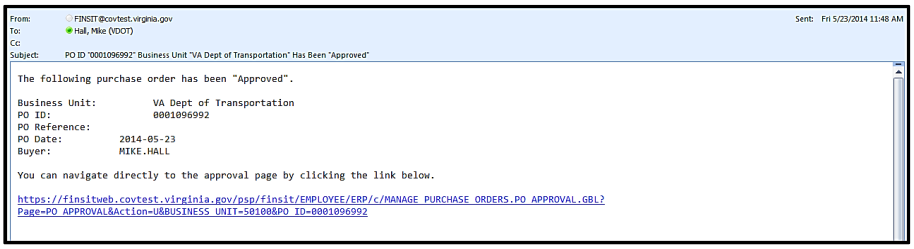
21. Click the **Save** button.
22. Cardinal assigns a **PO ID** number upon save.
23. Click the PO **Submit for Approval** check-box (the green checkmark) which is next to the **PO Status** field, to send it forward for approval by your supervisor.



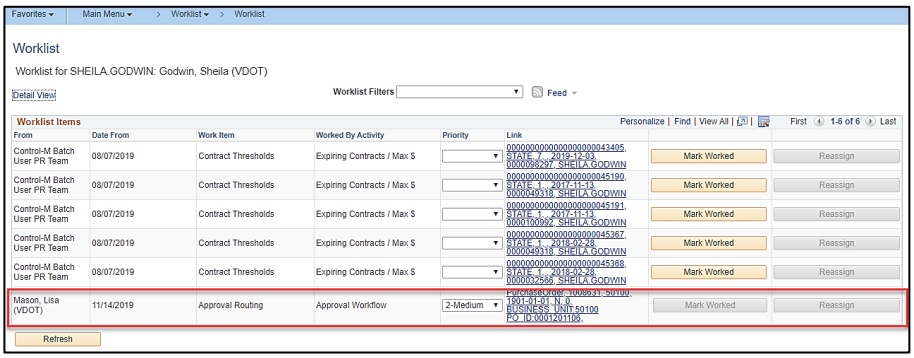
24. The **PO Status** changes to **Pend Appr** (i.e., pending approval) and your supervisor is notified via email and worklist.

25. Click the **View Approvals** hyperlink to view the pending and completed approval actions.

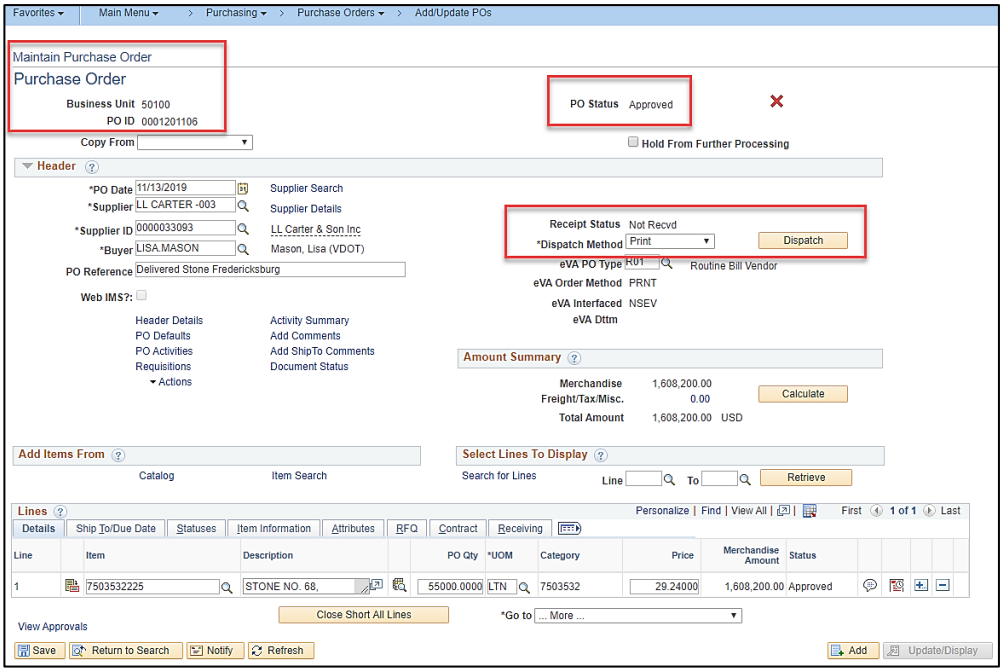
26. Example of email:



27. Example of worklist:

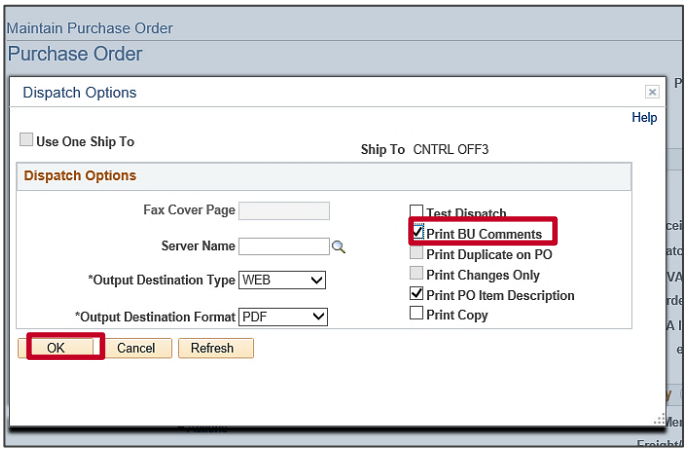


28. Upon approval, the Buyer receives an email and can navigate to the PO from the hyperlink. Once approved, the PO is ready to be dispatched. POs are dispatched automatically in batch periodically throughout the day, or the Buyer may choose to dispatch it manually.

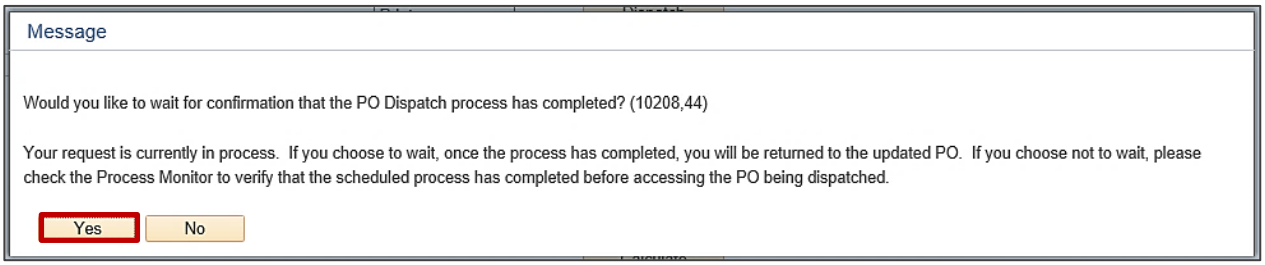


29. The Maintain Purchase Order – Purchase Order page displays the PO Status of Approved.

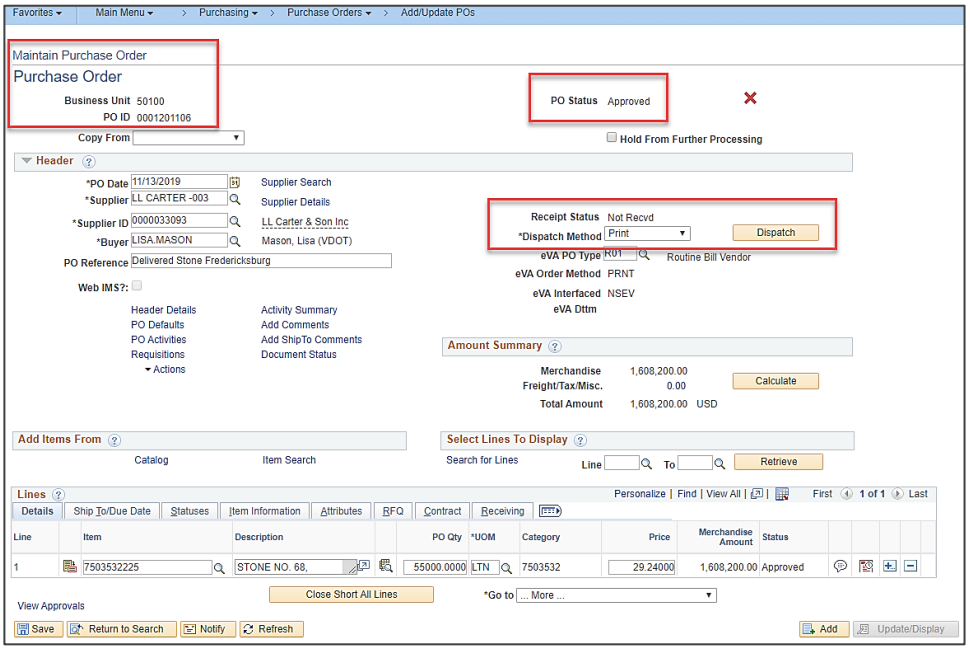
30. The **Dispatch Method** defaults to **Print**. Click the **Dispatch** button. The **Dispatch Options** pop-up window displays.



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



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



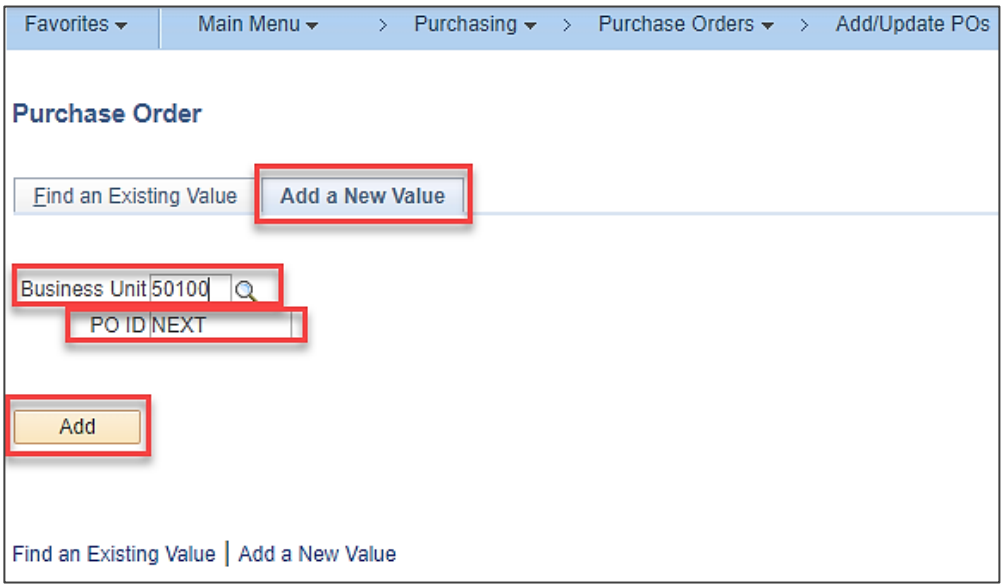
36. The **PO Status** is updated to **Dispatched**.

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

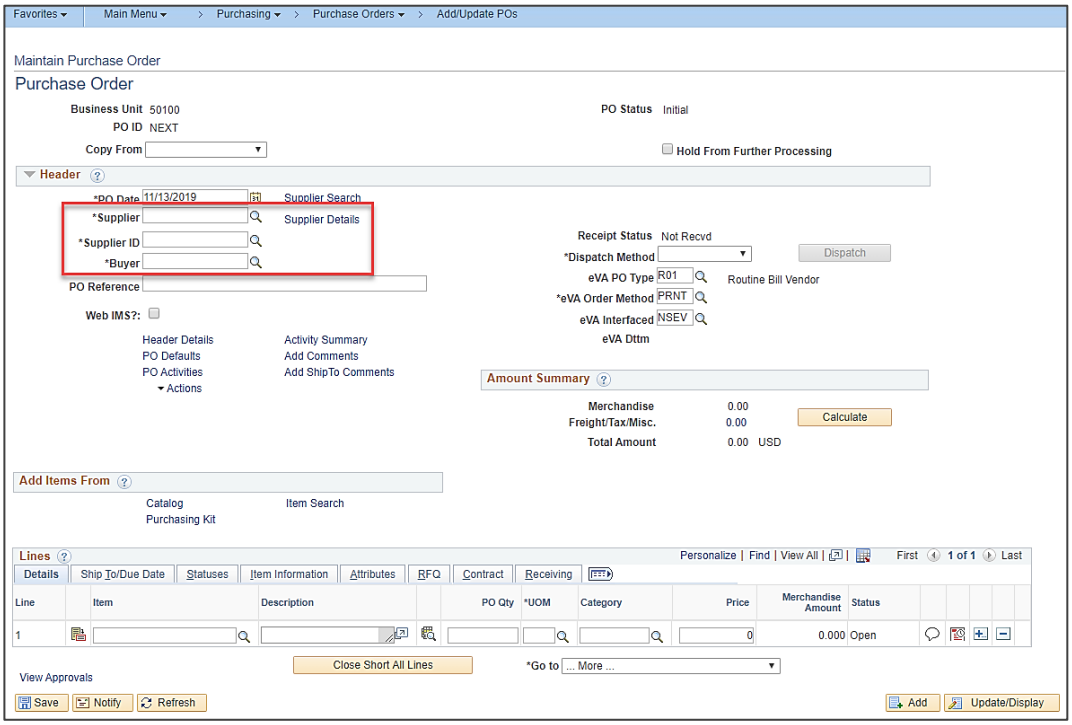
Purchase Order (Ad-Hoc)

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

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

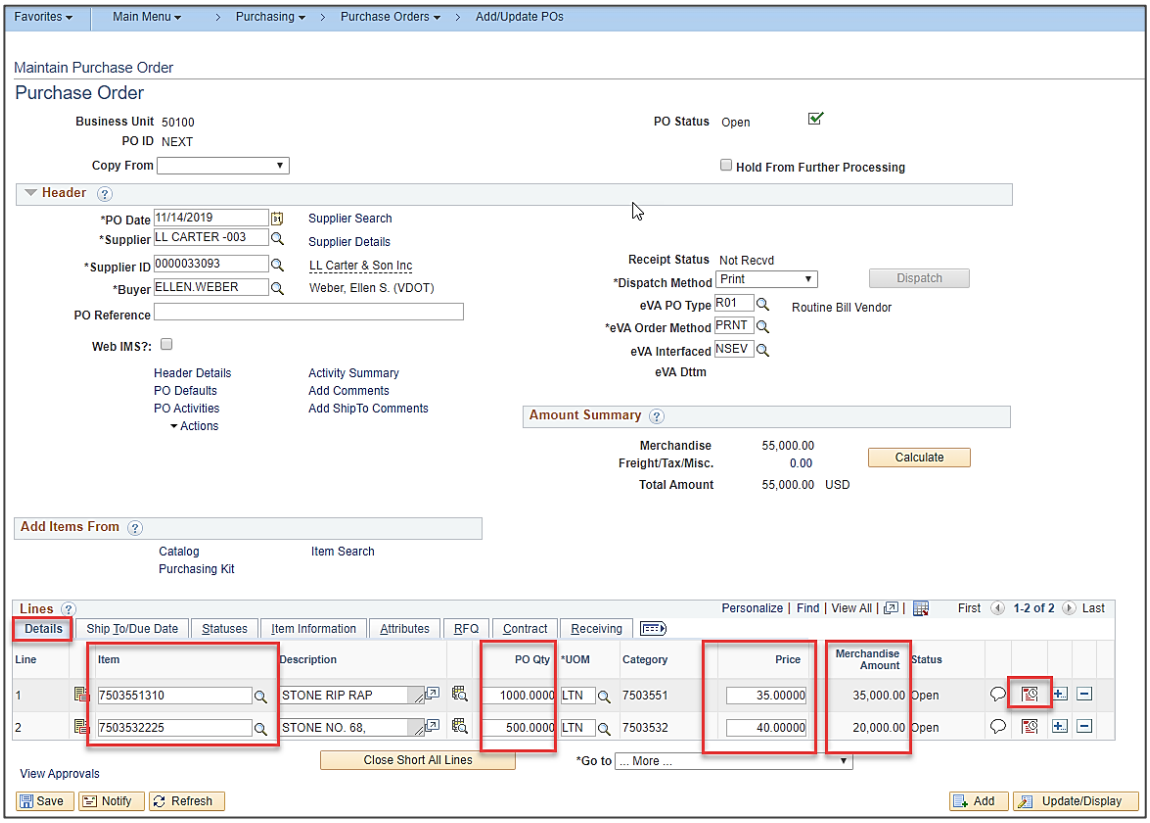


2. Select **Add** a New Value tab. Business Unit = 50100, PO ID = NEXT (Do Not Change)
3. Cardinal assigns a **PO ID** number when you successfully save the PO.
4. Click **Add** button.



5. PO default information is displayed as shown.

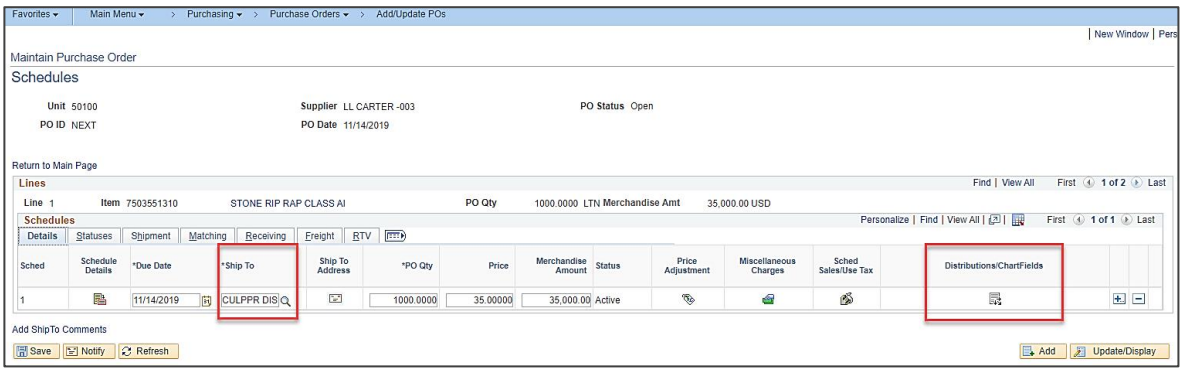
6. Enter **Supplier ID**. Use lookup icon if necessary.



7. Enter **Item ID**.

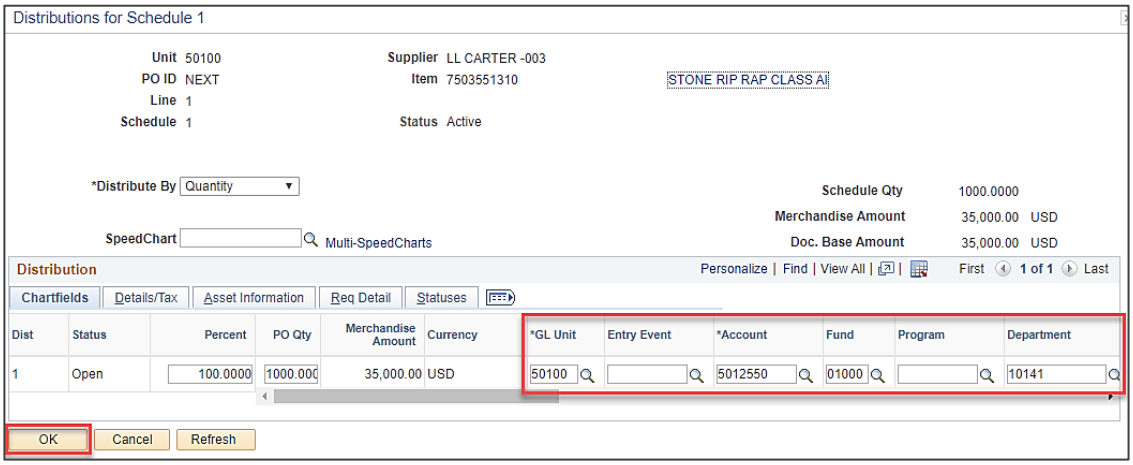
8. Enter **PO QTY** and **Price**. Cardinal calculates and displays the total **Merchandise Amount**.

9. Click on **Schedule** icon.



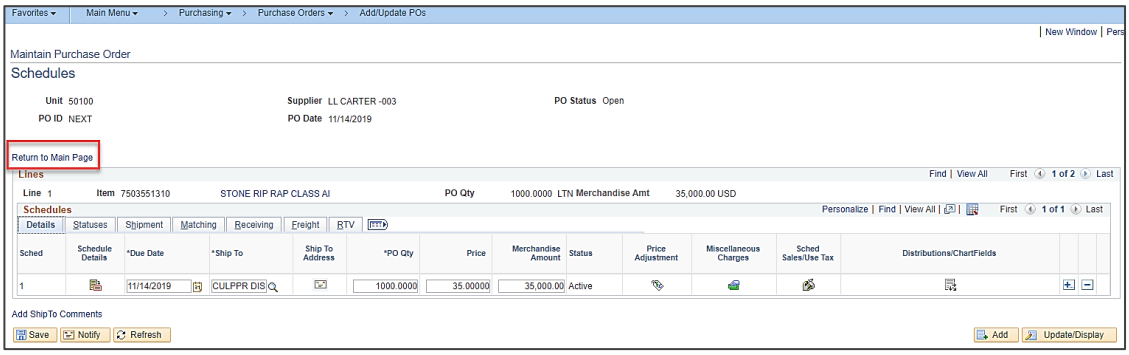
10. Enter/Update **Ship To** location as necessary.

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

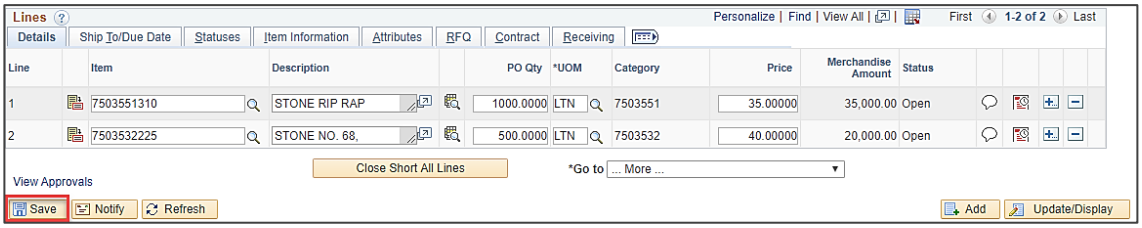


12. Enter your accounting distribution.

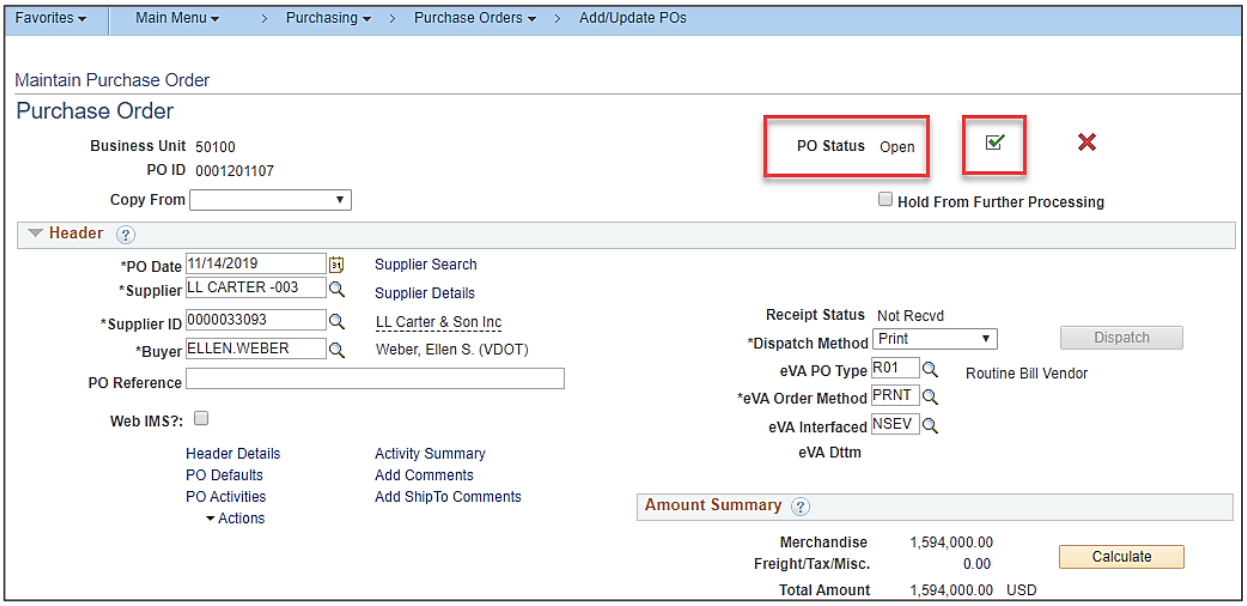
13. Click **OK**.



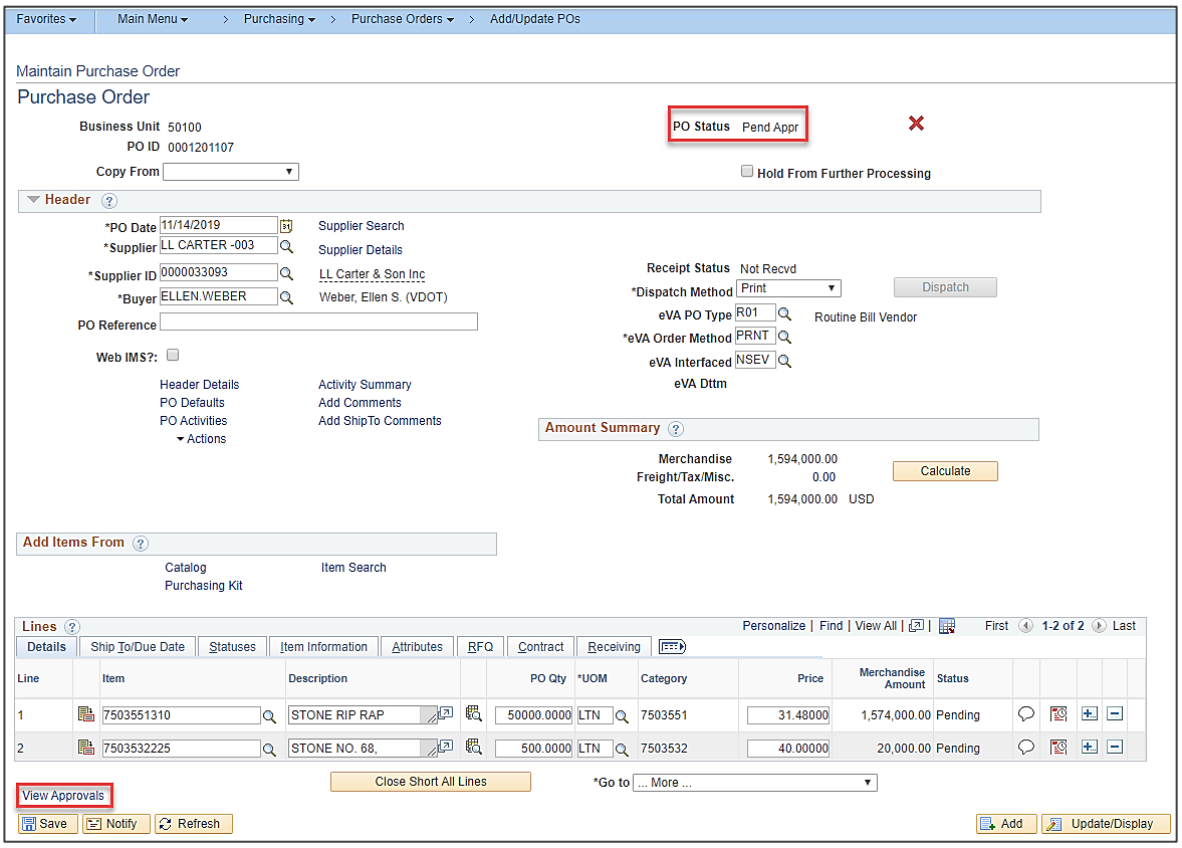
14. Click Return to **Main Page** hyperlink.



15. Click **Save**.

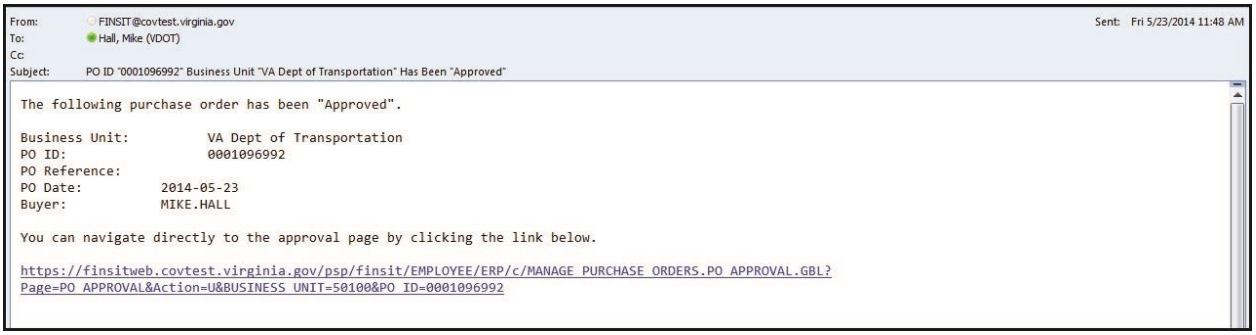


16. Click on **PO Status** checkbox.



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

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



From: FINSIT@covtest.virginia.gov
To: Hall, Mike (VDOT)
Cc:
Subject: PO ID "0001096992" Business Unit "VA Dept of Transportation" Has Been "Approved"
Sent: Fri 5/23/2014 11:48 AM

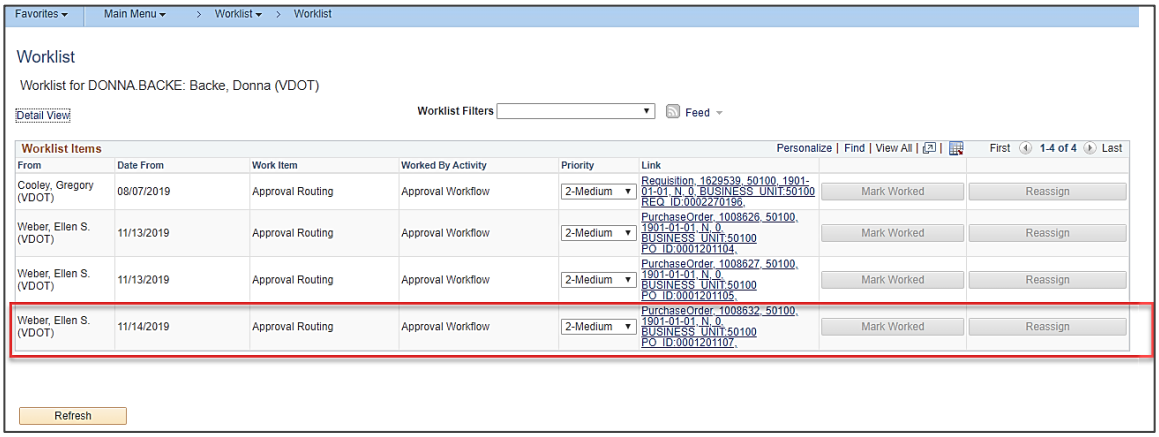
The following purchase order has been "Approved".

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

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

https://finsitweb.covtest.virginia.gov/psp/finsit/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.PO_APPROVAL.GBL?Page=PO_APPROVAL&Action=U&BUSINESS_UNIT=50100&PO_ID=0001096992

Example of Email



Favorites | Main Menu > Worklist > Worklist

Worklist

Worklist for DONNA.BACKE: Backe, Donna (VDOT)

Detail View

Worklist Filters | Feed

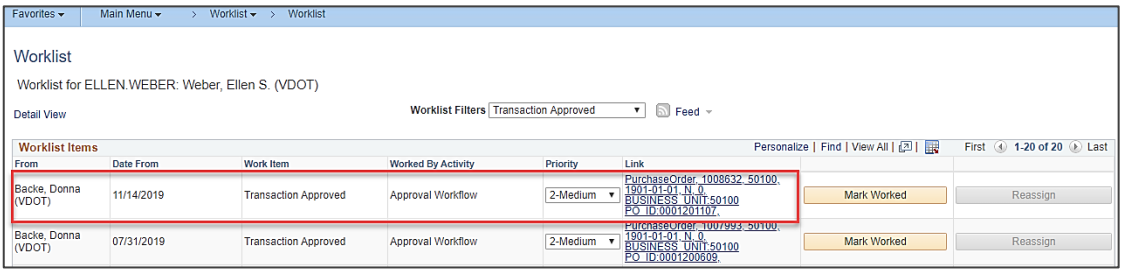
Worklist Items — Personalize | Find | View All | First 1-4 of 4 Last

From	Date From	Work Item	Worked By Activity	Priority	Link		
Cooley, Gregory (VDOT)	08/07/2019	Approval Routing	Approval Workflow	2-Medium	Requisition, 1629539, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 REQ_ID:0002270196,	Mark Worked	Reassign
Weber, Ellen S. (VDOT)	11/13/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1008626, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001201104,	Mark Worked	Reassign
Weber, Ellen S. (VDOT)	11/13/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1008627, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001201105,	Mark Worked	Reassign
Weber, Ellen S. (VDOT)	11/14/2019	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1008632, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001201107,	Mark Worked	Reassign

Refresh

Example of Worklist

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



Favorites | Main Menu > Worklist > Worklist

Worklist

Worklist for ELLEN.WEBER: Weber, Ellen S. (VDOT)

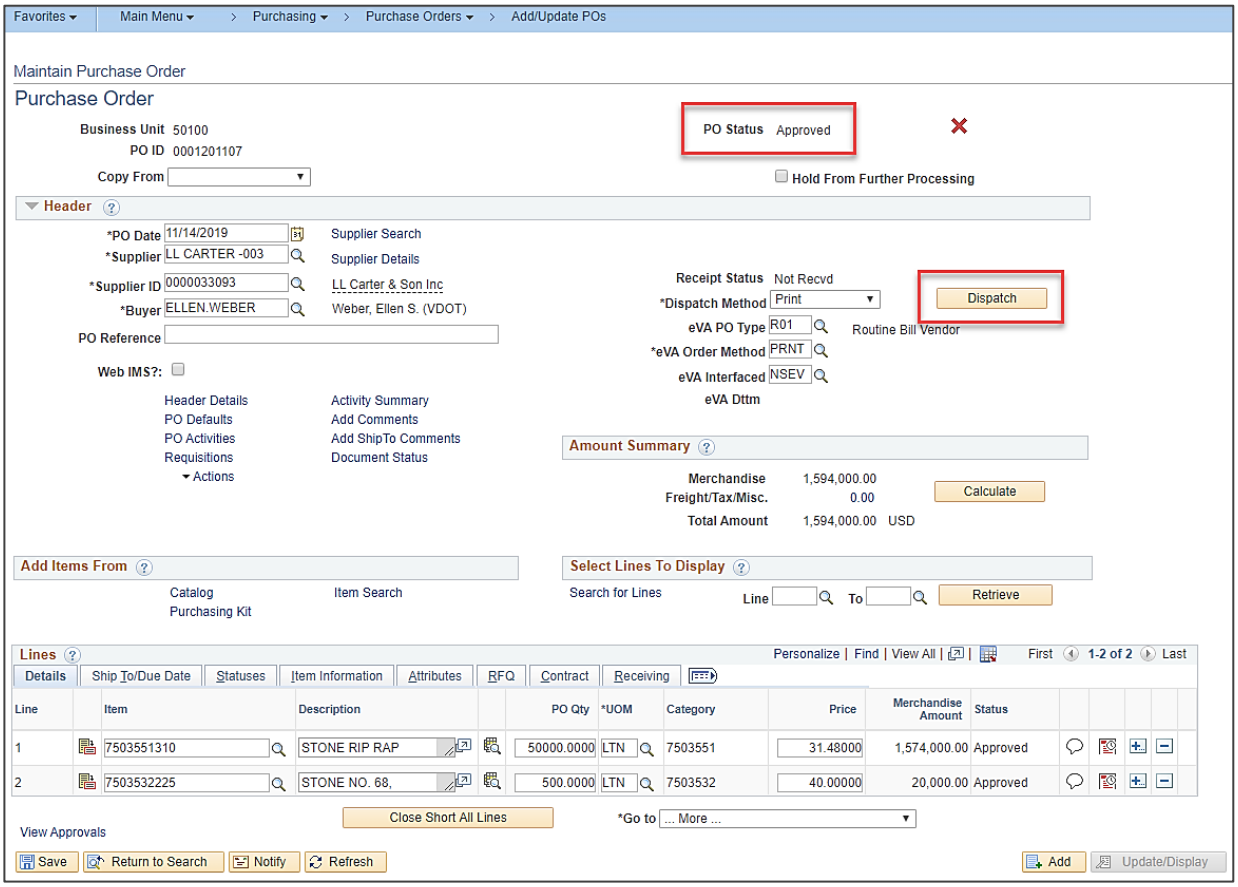
Detail View

Worklist Filters: Transaction Approved | Feed

Worklist Items — Personalize | Find | View All | First 1-20 of 20 Last

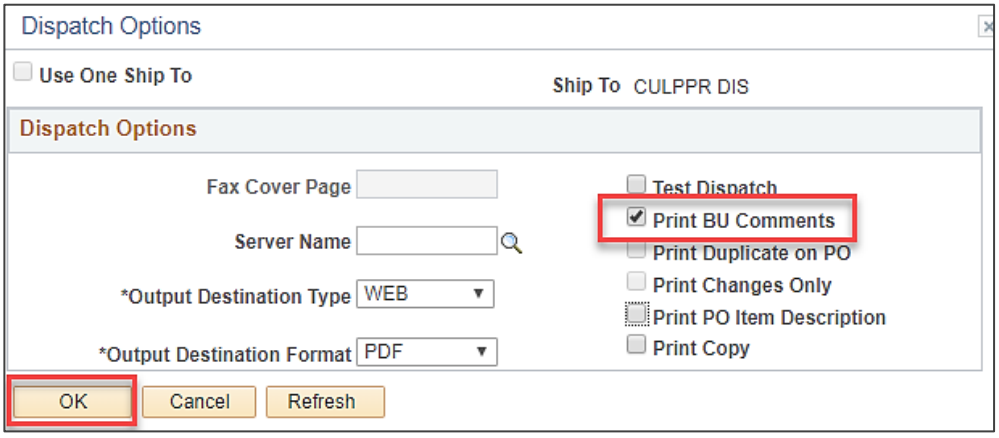
From	Date From	Work Item	Worked By Activity	Priority	Link		
Backe, Donna (VDOT)	11/14/2019	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder, 1008632, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001201107,	Mark Worked	Reassign
Backe, Donna (VDOT)	07/31/2019	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder, 1007993, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001200609,	Mark Worked	Reassign

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



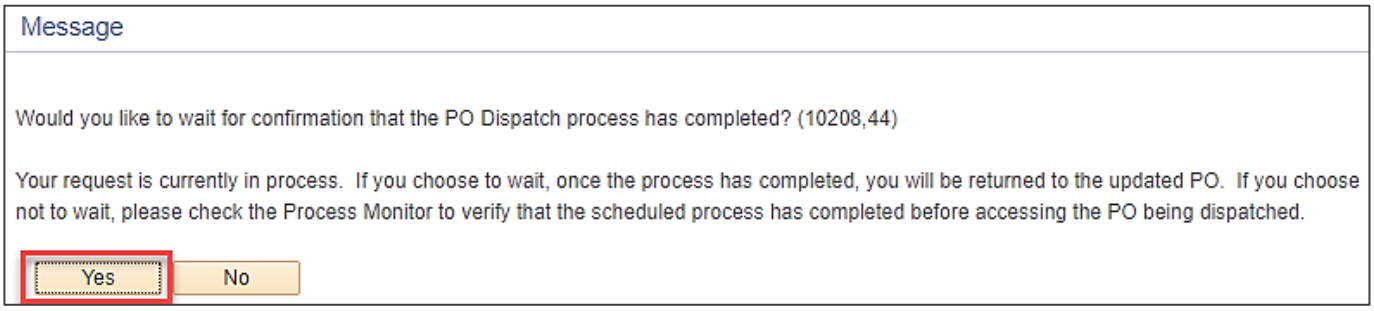
21. PO is displayed and shows **Approved** status.

22. Click on **Dispatch** button.

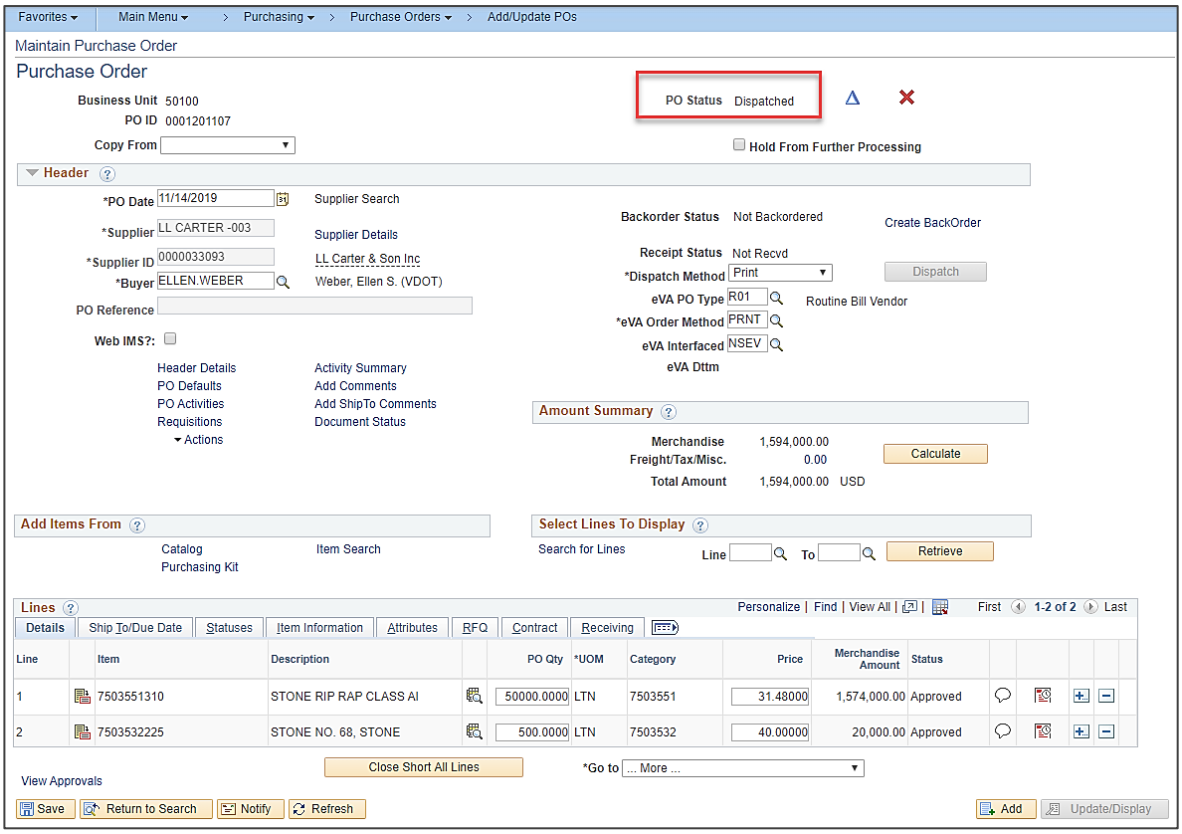


23. Check **Print BU Comments** to display Line and Header comments, to include eVA T&C.

24. Click **OK**.



25. Click **Yes**



26. Purchase Order is **Dispatched**.

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

PO Helpful Hints

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

PO Defaults

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

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

Look Up eVA PO Type

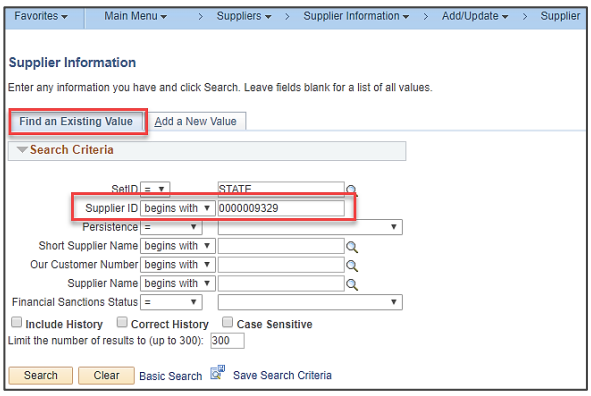
Select one of the following values:

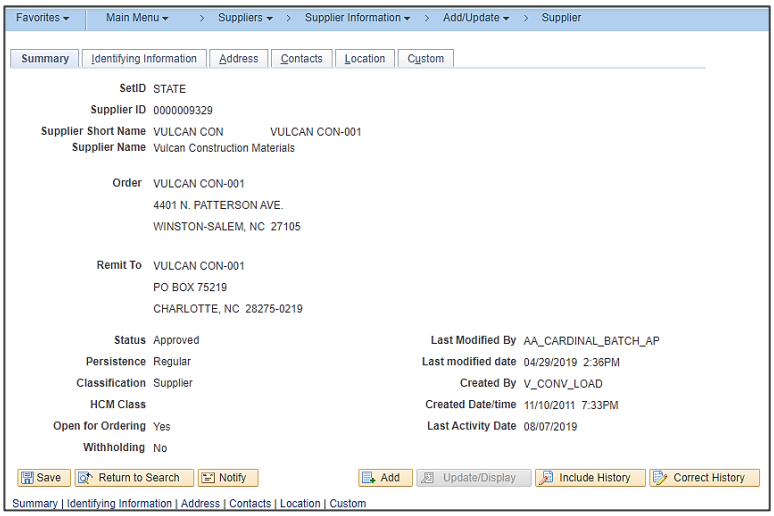
E01	Emrgcy Bill Vendor
EPO	Existing PO
EVP	eVA Purchase Order
GOP	Grant Opportunity
INV	PCard Payment of Invoice
ISP	Integrated Supply Serv Prog
OTC	Over The Counter eVA Exempt
P01	Proprietary Bill Vendor
R01	Routine Bill Vendor
S01	Sole Src Bill Vendor
VE1	Emrgcy VITA Bill Vendor
VP1	Proprietary VITA Bill Vendor
VR1	Routine VITA Bill Vendor
VS1	Sole Src VITA Bill Vendor
X02	Excluded Per APSPM

Cancel

Suppliers

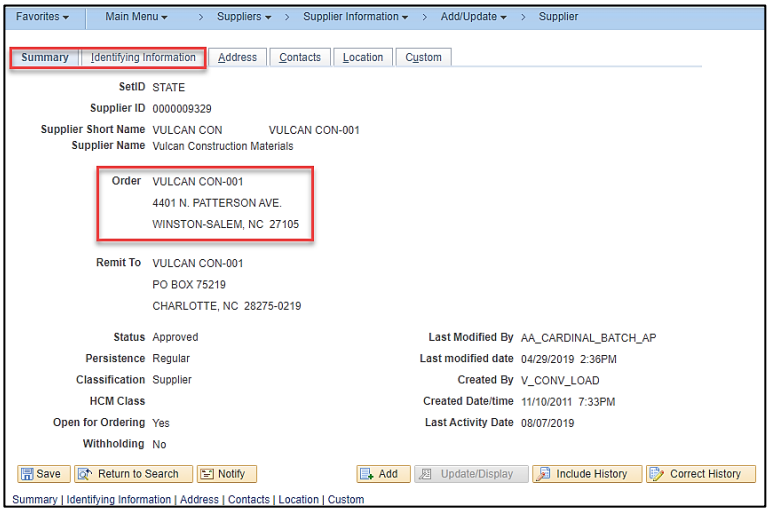
1. If this message displays, the selected supplier must be changed.
2. Supplier information is electronically transmitted from eVA into Cardinal. It is important to ensure that the eVA supplier and ordering address are correct on the PO.
3. Before creating a PO you may wish to verify a supplier, address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



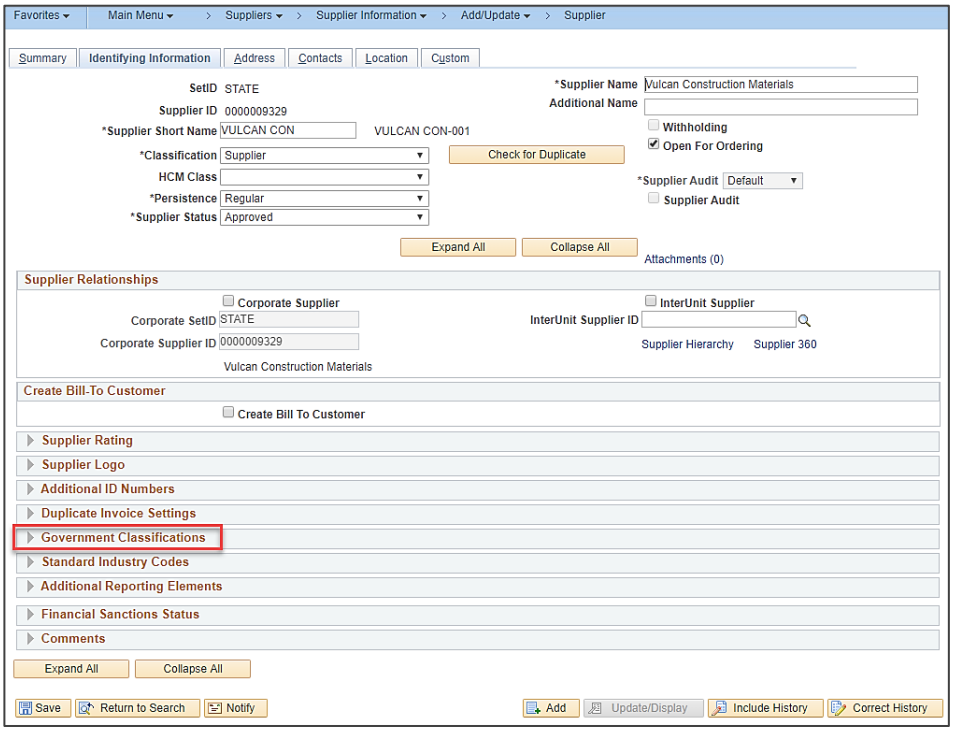


4. Search for the supplier you wish to review.
5. Click the **Supplier ID** hyperlink.

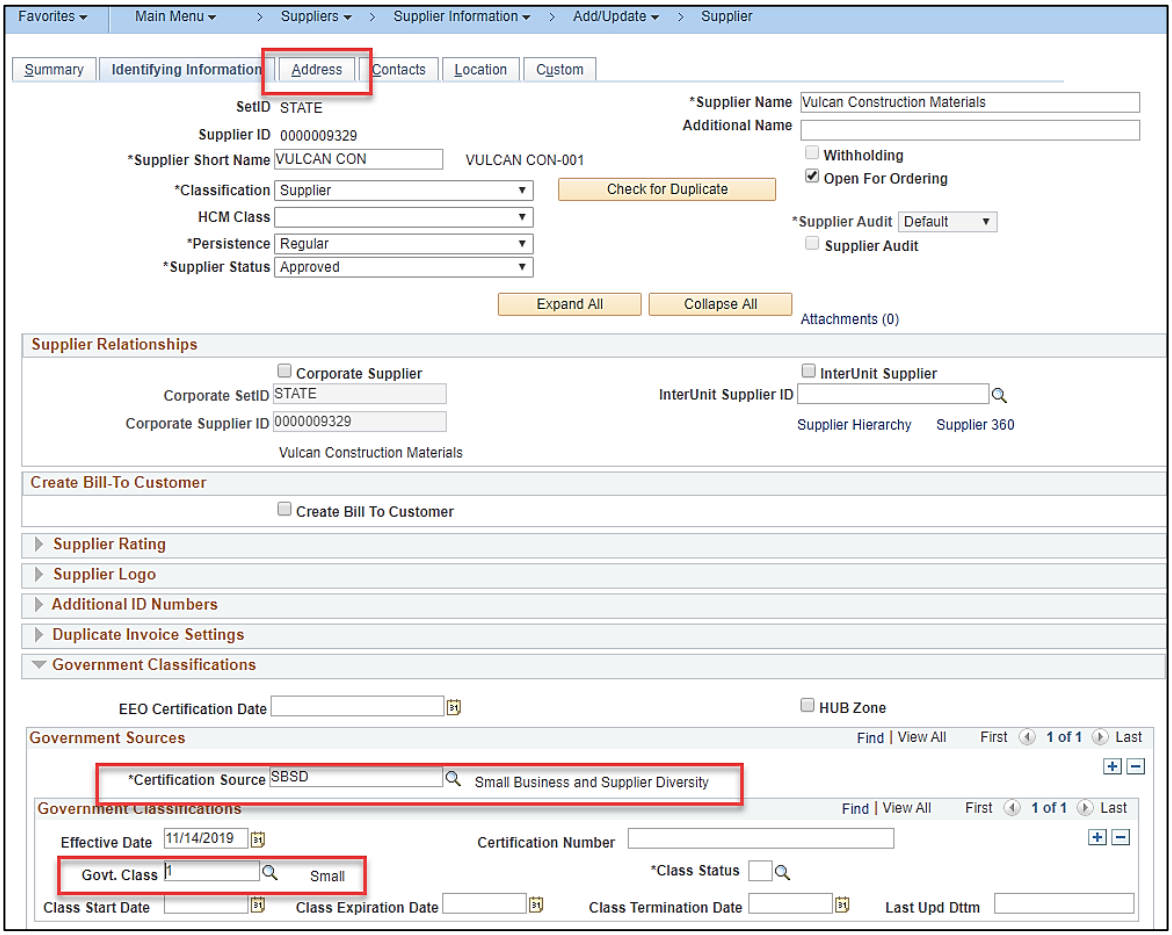
6. The default ordering address displays on the **Summary** tab.



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

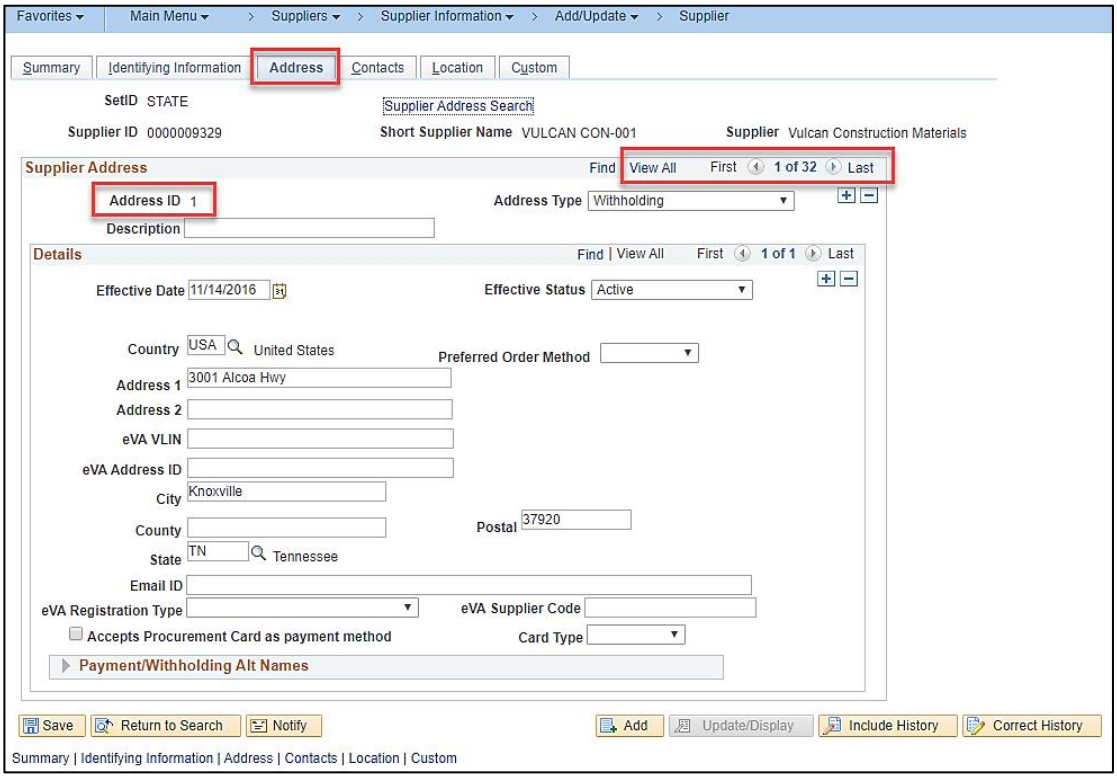


8. To view the supplier's Virginia Department of Small Business and Supplier Diversity (SBSD) classification, click the arrow next to the **Government Classifications** section to expand the section.



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

10. Select the **Address** tab.



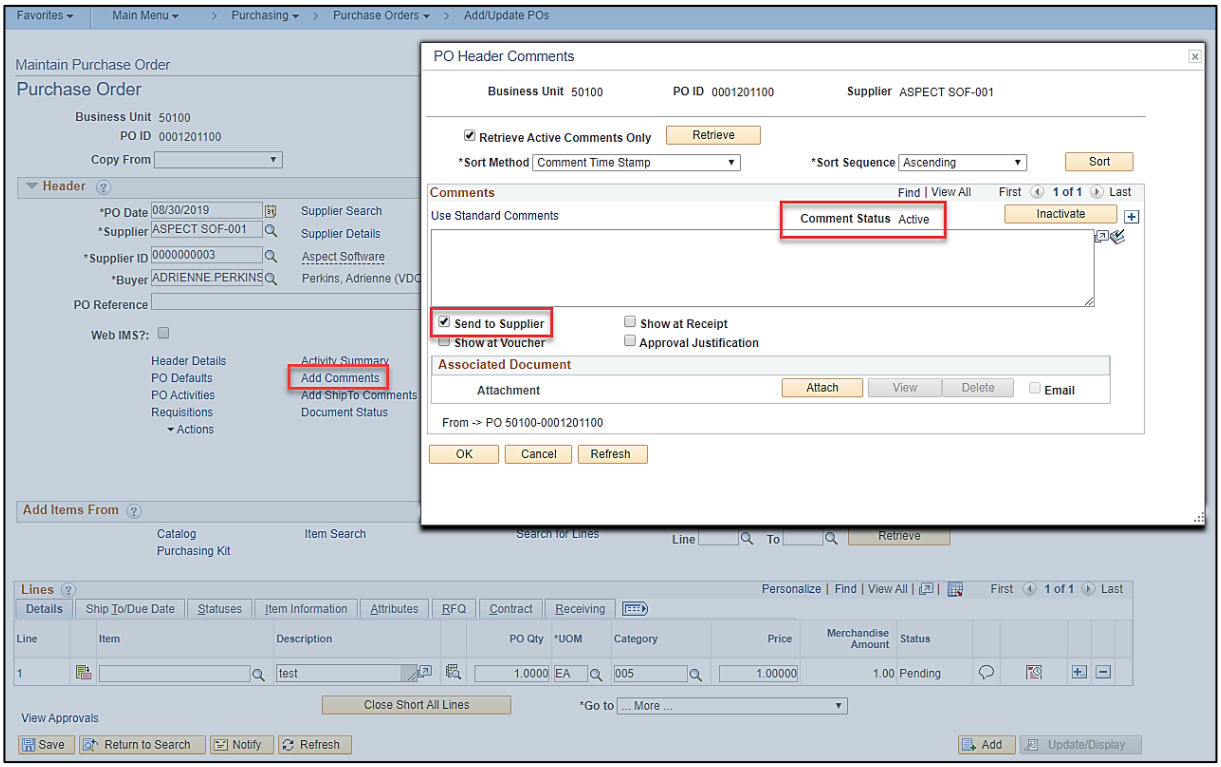
11. There are 4 available addresses. Using the left and right arrows you can scroll through the addresses to find the proper ordering address for your PO or, by selecting **View All**, you can see all the addresses stacked on the page and use the page scroll bar to view them.
12. Take note of the **Address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

Virginia Distribution Center (VDC) Purchase Orders

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

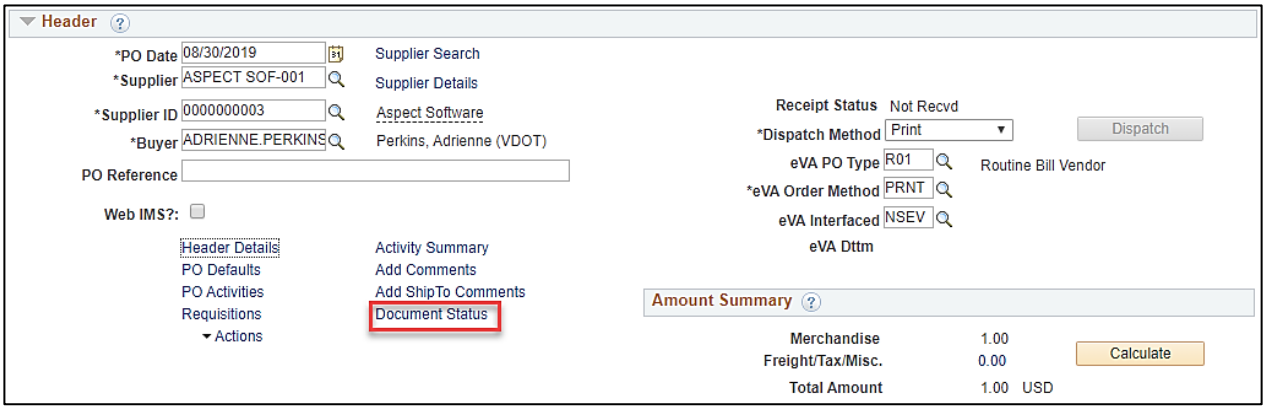
PO Comments

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

5. 

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

Related Documents

6. 

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