



Purchase Orders 101

State of Vermont
Department of Finance & Management
February - 2024

Revisions to Manual

February 2024

- Updated for PeopleTools 8.60 upgrade

August 2020

- Added amount only information to additional PO exercises

May 2019

- Added a step to match POs on amount only starting on page 24

April 2019

- Manual finalized

December 2018:

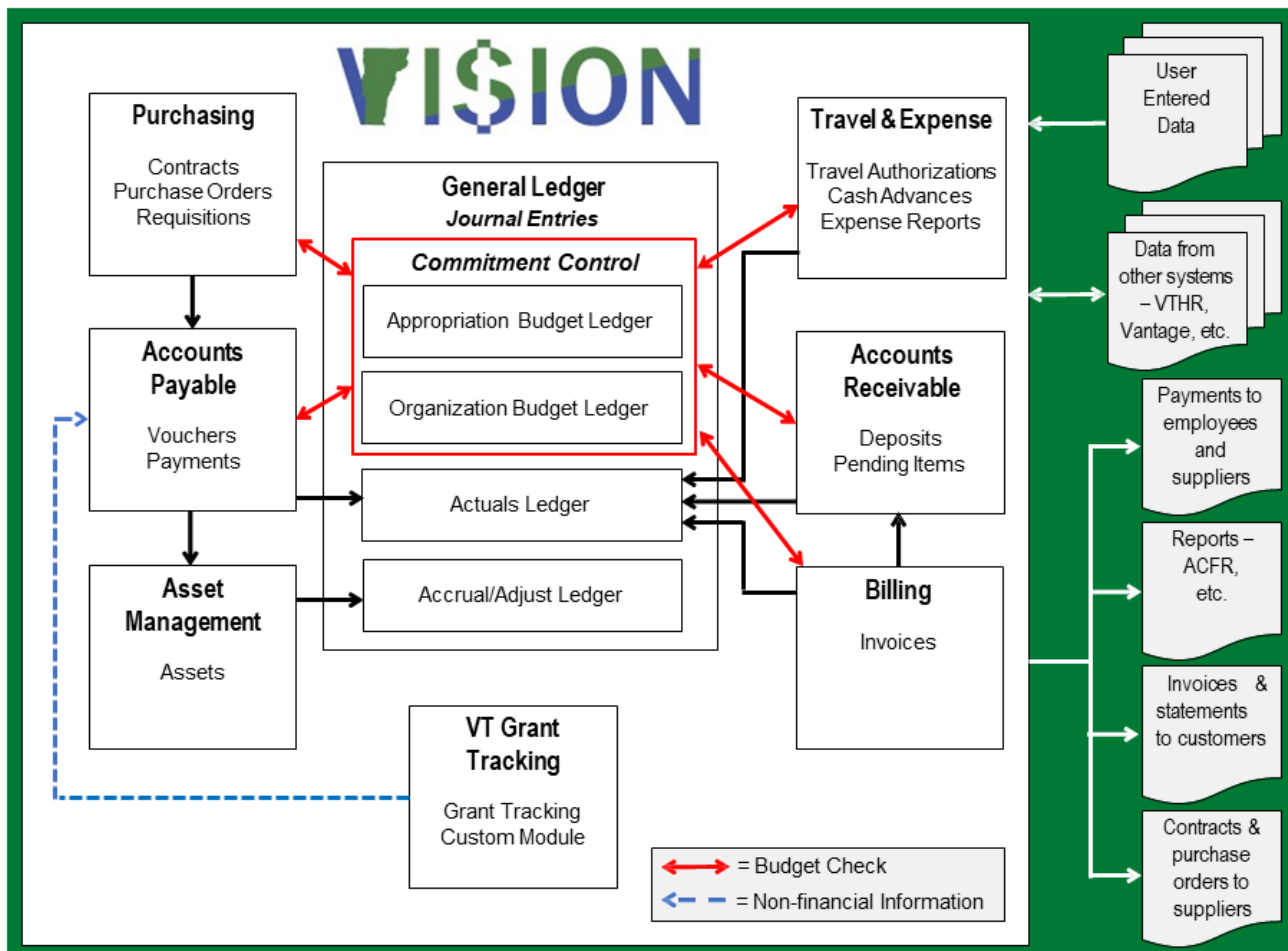
- Manual written

Table of Contents

| | |
|---|----|
| Revisions to Manual | 2 |
| Introduction to Purchase Orders | 4 |
| State of Vermont Required Fields for Entering a Purchase Order | 6 |
| Purchase Order Process Flow Chart..... | 7 |
| Frequently Asked Questions (FAQs)..... | 8 |
| How to determine if a Commodity is on Contract | 9 |
| Enter a Purchase Order Against a Contract | 11 |
| Add Attachments to Purchase Order Header or Lines..... | 26 |
| Enter a Purchase Order against a Contract with Split Funding..... | 32 |
| Enter a Purchase Order Against an Expired Contract | 42 |
| Copy an Existing Purchase Order | 46 |
| Copy a Purchase Order from a Contract using every Contract Line | 50 |
| Enter an Express Purchase Order..... | 56 |
| Create a Change Order for a PO..... | 60 |
| Create a Change to a PO - Schedule..... | 65 |
| Create a Change to a PO - Distribution | 70 |
| Print a Dispatched Purchase Order | 77 |
| Print a Purchase Order for Authorized Signature | 79 |
| Dispatch and Print a Purchase Order from the Run Control Process..... | 82 |
| Reports & Queries | 86 |

Introduction to Purchase Orders

Overview of VISION Financial System



The Purchasing Module is the entry point for purchase orders. There are four functions of a purchase order:

- Initiate a purchase with a supplier
- Track payments and usage against a statewide contract
- Track payments against a department specific personal services contract
- Serve as the control for encumbering funds as purchases and payments are executed

Vision Procedure # 3 outlines the use of Purchase Orders, Contracts and BDA's (Blanket Delegation of Authority) in the State of Vermont's VISION financial system.

- A VISION Purchase Order must be prepared and charged to the appropriate VISION procurement contract when making payments in VISION on contracts for services and commodities, regardless of dollar amount in accordance with AOA Bulletin 3.5 (with the exception of Personal Service, Zero Dollar and some Financial Transaction contracts as defined by AOA Bulletin 3.5)

- All payments processed against a contract for service or commodities shall be coded using the appropriate expenditure accounts per the VISION Chart of Accounts
- Purchases made on contract by utilizing the State of Vermont Purchasing Card are exempt from requiring a Purchase Order. Authorized contracts for Purchasing Card utilization are defined in the State of Vermont Purchasing Card Policy

Visit the Finance and Management website at <http://finance.vermont.gov/policies-and-procedures/vision-procedures> to review VISION Procedure #3 in its entirety.

Policy #1: Suspension and Debarment

- The State of Vermont will not make purchases over \$25,000 or enter into grants or contractual agreements of any amount with vendors that have been suspended or debarred by the Federal government. This policy applies to all such purchases and agreements, regardless of funding source
- The Department of Buildings and General Services includes a Suspension and Debarment clause, similar to the above, in all contracts available for statewide use. Therefore, departments making purchases from statewide contracts do not have to verify suspension and debarment separately

Visit the Finance and Management website at <http://finance.vermont.gov/policies-and-procedures/vision-procedures> to review Policy # 1 in its entirety.

Additional Information on Purchase Orders and the Purchasing Process can be found in the following documents:

- Agency of Administration Bulletin 3.5 is located on the Finance and Management website under Policies and Procedures and at <http://aoa.vermont.gov/bulletins>
- [Buyer's Resource Guide](#) located on the Building's and General Services website under Purchasing and Contracting, Policies and Procedures

State of Vermont Required Fields for Entering a Purchase Order

NOTE: Departments may define additional required fields as needed for their own business processes.

Maintain Purchase Order Page

- **PO Date** (defaults as current date)
- **Supplier ID**
- **Buyer**
- **Item** (if applicable Item can be found in VISION) or
- **Description** (required if there is not an Item entered)
- **PO Qty**
- **Unit of Measure (UOM)**
- **Category**
- **Price**

Header Details Link

- **PO Type** (defaults as GEN)
- **Billing Location**
- **Origin**
- **Accounting Date** (defaults as current date, accept default)

If PO is drawing down a contract -Under Contract Tab

- **Contract ID**
- **Contract Line**

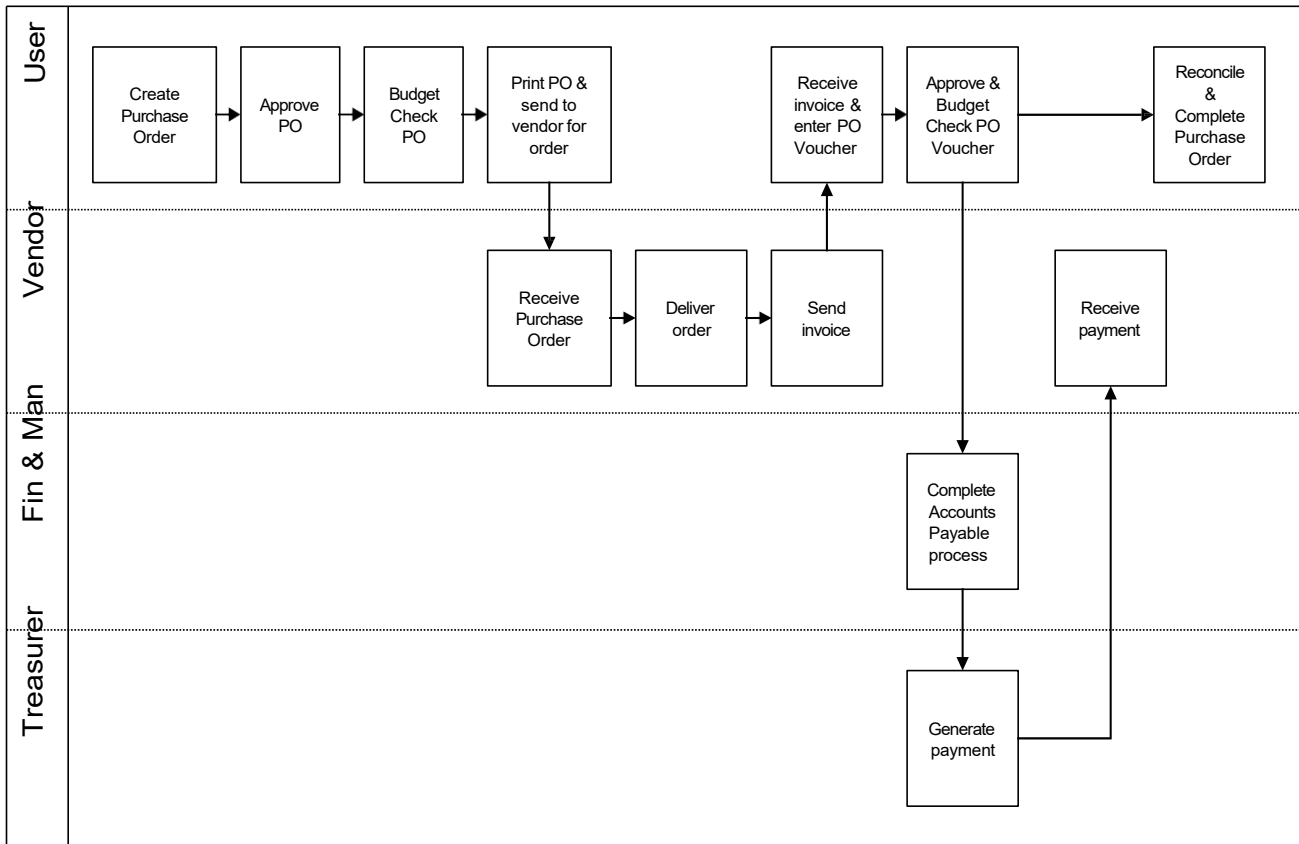
Schedules Page

- **Due Date**
- **Ship To**
- **PO Qty** (defaults from main page)
- **Price** (defaults from main page)
- **Amount** (defaults from main page)

Distributions for Schedule 1 Page

- **Account**
- **Fund**
- **Dept ID**

Purchase Order Process Flow Chart



Frequently Asked Questions (FAQs)

Why am I receiving an “Invalid Value” error message when I try to enter a PO against a valid contract?

Typically, this happens because of a couple different reasons. In the contract Header page, check the begin and expire dates to confirm the contract is available for use. If the dates are valid, verify the contract is in Approved status. If the dates are fine and the contract is approved, contact VISION Support at 828-6700 option 2 for assistance or by email at VISION.FinHelpdesk@vermont.gov.

Why aren't the PO Defaults that I put in my contract coming into my purchase order?

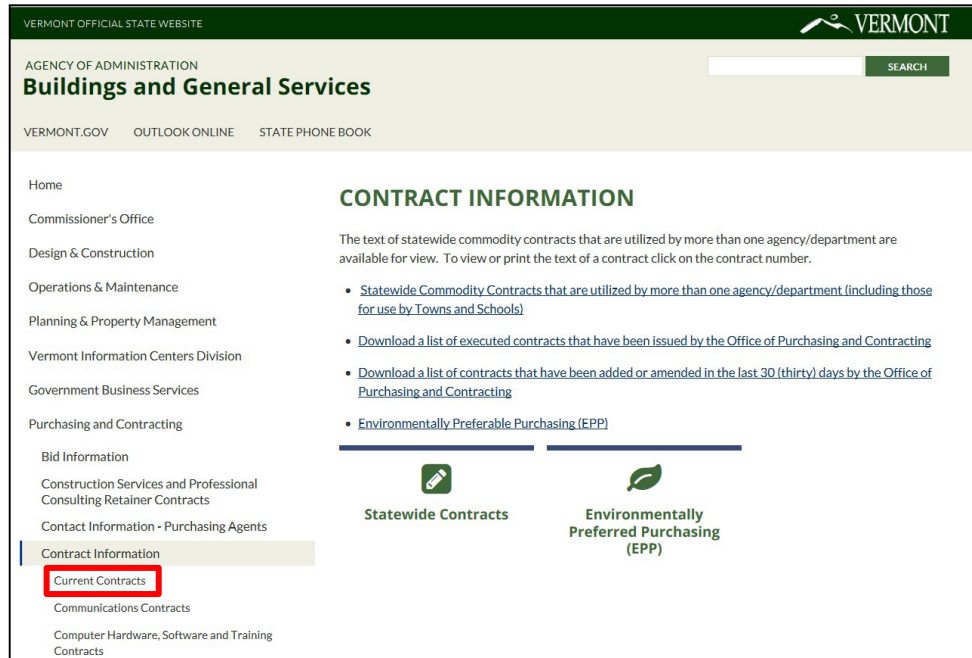
PO Defaults set up on a contract will only come into the Purchase Order if the PO is copied from the Contract. If you enter the Contract number on the Contract tab of your PO, the default information will not come forward.

Why am I getting a gray box that says “Unauthorized” at the bottom of the page when I print my purchase order?

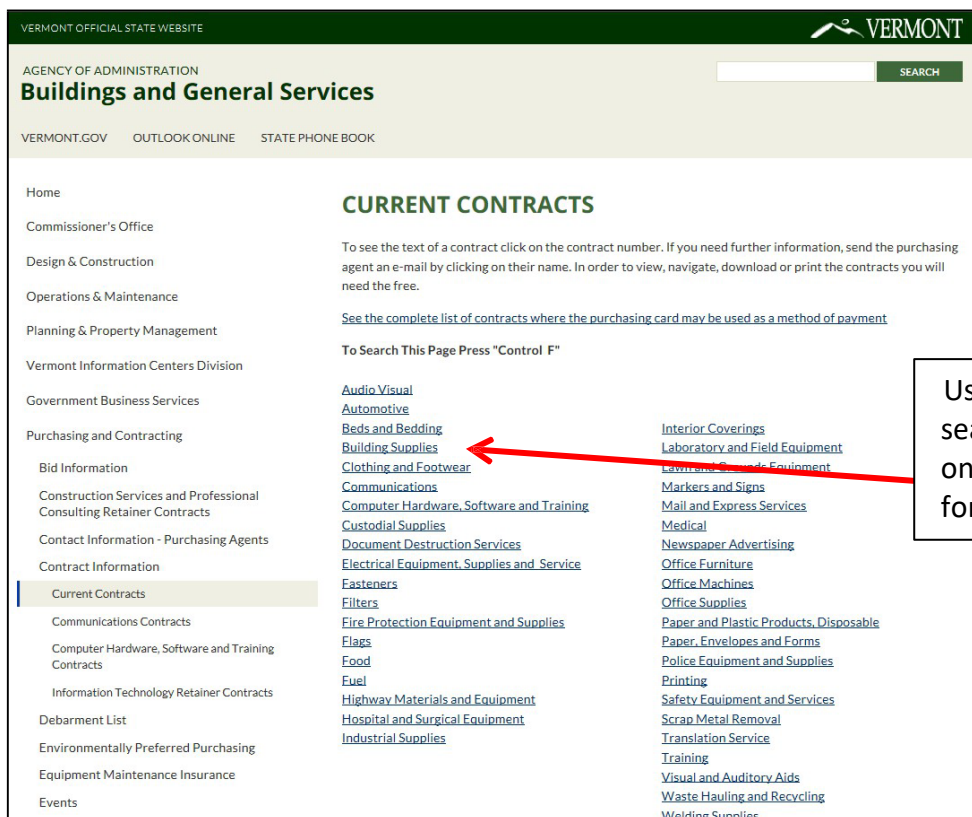
Printing an Authorized Signature PO is done through Dispatch POs and not Review PO Information. See the Print a Purchase Order exercise in this manual for instructions. Also, be sure that the PO is approved.

How to determine if a Commodity is on Contract

Navigation: Go to the [Office of Purchasing and Contracting](#) website



Click on the [Current Contracts](#) link



Building Supplies

- Lumber and Building Supplies
 - LaValley Building Supply Inc, Contract [34436](#)
 - Poulin Lumber, Contract [34441](#)
- Hardwood Plywood
 - Atlantic Plywood Corporation, Contract [36064](#)
- Plumbing and HVAC Supplies
 - Granite Group, Contract [30953](#)
 - F. W. Webb, Contract [31324](#)

Clothing and Footwear

- Safety Shoes and Boots : Industrial Protection Product, Contract [33797](#)
- FPR Resale Shirts: Express Press, Contract [36507](#)
- Inmate Uniforms : Acme Supply Co Ltd, Contract [34128](#)
- Inmate Clothing : Bob Barker Company Inc., Contract [36206](#)
- Corrections Officer's Uniform : Ben's Uniforms, Inc., Contract [27564](#)
- Forestry Clothing: Initial Ideas, Contract [35154](#)
- Security Uniforms : Ben's Uniforms, Inc., Contract [29501](#)
- Shirts and Caps : Express Press, Contract [36747](#)
- Rough Duty Uniforms : Ben's Uniforms, Inc, Contract [36054](#)
- State Police Uniforms : Ben's Uniforms, Inc, Contract [34114](#)
- Uniform Rental & Cleaning: Unifirst, Contract [35508](#)
- Vermont Information Center Uniforms: Express Press, Contract [36760](#)
- High Visibility Safety Clothing: Applied Industrial Technologies Inc, Contract [35356](#)
- High Visibility Safety Clothing: Reflective Apparel Factory Inc., Contract [35354](#)

Click on the contract number hyperlink to view the contract

The **Contract** page opens displaying information regarding what items are on this contract:

| State of Vermont | | CONTRACT | |  | | |
|---|---------|--|-----|--|---------|---------|
| Buildings and General Services Office of Purchasing & Contracting 109 State St Montpelier VT 05609-3001 USA | | Vendor ID 0000009824 Ben's Uniforms Inc 20 Main Street Amesbury MA 01913 USA | | Contract ID 00000000000000000000000029501 Contract Dates 10/01/2015 to 09/30/2019 Description: CPS - SECURITY UNIFORMS Buyer Name Deborah L. LaRose Buyer Phone 828-4635 | | |
| Phone #: 978-388-0471 | | Contract Dates 10/01/2015 to 09/30/2019 | | Page 1 of 7 | | |
| Contract Maximum \$999,999.99 | | Contract Status Approved | | | | |
| Line # | Item ID | Item Desc | UOM | Unit Price | Max Qty | Max Amt |
| 1 | | SHIRT, SHORT SLEEVED | EA | 56.00000 | 0.00 | 0.00 |
| 80/20 RAYON BLEND, 10 OZ., PLAIN WEAVE, TRADITIONAL 5-CREASE MILITARY STYLE, SEW-IN MILITARY STYLE CREASES, PLEATED POCKETS WITH SCALLOPED FLAPS, PENCIL SLOT LEFT AND HOOK-AND-LOOP CLOSURE, CONVERTIBLE SPORT COLLAR, EPAULETS, BADGE EYELETS WITH INTERNAL SUPPORT STRAP, EXTRA-LONG SHIRT TAILS, COLLAR PIN EYELETS IN COLLAR, MACHINE WASHABLE, COLOR: TAN OR WHITE. | | | | | | |
| INDICATE MFR, PRODUCT CODE, COLOR AND SIZE OF SHIRT AT TIME ORDER | | | | | | |
| BLAUER #8910 OR FLYING CROSS #W69W6604 | | | | | | |
| SIZE 14.5 - 17.5 - \$56.00/EACH | | | | | | |
| SIZE 18 - 18.5 - \$60.00/EACH | | | | | | |
| SIZE 19.5 \$65.00/EACH | | | | | | |
| 2 | | SHIRT, LONG SLEEVED | EA | 51.00000 | 0.00 | 0.00 |

How to determine if a Commodity is on Contract is Complete

Enter a Purchase Order Against a Contract

Situations when this function is used: When making payments on contracts for services, products, and construction regardless of dollar amount in accordance with Bulletin 3.5 and VISION Procedure #3.

Note: *In this exercise we are demonstrating the best way to enter a purchase order against a contract that has multiple lines, but not all the contract lines are needed.*

Purchase Orders must be approved, have a valid budget check, and be dispatched to be used in a Voucher.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:



1. Click **Add**

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID NEXT
Copy From [v]
PO Status Initial ☒
Budget Status Not Chk'd
☐ Hold From Further Processing

Header ?

*PO Date 11/02/2018 Supplier Search
*Supplier [v] Supplier Details
*Supplier ID [v]
*Buyer ETEST Eric John Hoefel
PO Reference [v]
Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions

Amount Summary ?

| | |
|-------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-------------|--------|------|----------|-------|--------------------|----------|
| 1 | | | | | | 0 | 0.000 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

The following information defaults in: PO Status = Initial, Budget Status = Not Checked and PO Date = Current Date.

2. Supplier Short Name or Supplier ID# - Enter one or the other

If entering the number be sure to include all the leading zero's, click the Refresh button at the bottom of the page and Supplier name automatically populates **or** open a new window and use the Vendor pages for look up

The Supplier Address for the Contract will default from the Supplier record. There will be no ability in VISION to change the Supplier Address directly on a Contract. To update the supplier address on the Purchase Order, Click the Supplier Search hyperlink to select a different address option

Header ?

*PO Date 01/22/2019 Supplier Search
*Supplier VCIVOWP-001 Supplier Details
*Supplier ID 0000041408 Vermont Correctional Industries/Vermont
*Buyer ETEST Ella Test
PO Reference [v]
Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions

Amount Summary ?

| | |
|-------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

3. Click the **Supplier Details** link to update the Supplier Address number on the Purchase Order

The **PO Supplier Information** page displays:

PO Supplier Information

Maintain Purchase Order

Supplier Details -- Vermont Correctional Industries/Vermont

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-001

*Location MULTIPLE

*Address Show Address Details

Contact Show Contact Details

Salesperson Show Salesperson Details

Supplier Information

Terms NET30 Net 30

Basis Date Type Inv Date

Supplier Details Message

Country USA United States Prefix

Address 1 280 State Dr, NOB 2 S Fax

Address 2 Prefix 802

Address 3 Phone 241-1472

City Waterbury

County Postal 05671-2000

State VT Vermont

OK Cancel Refresh

4. Click on the **Magnifying Glass** to see the supplier addresses available and select an address
5. Click **OK**

Header

*PO Date 01/22/2019 Supplier Search Doc Tot Status Valid

*Supplier VCI/VOWP-001 Supplier Details

*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

*Buyer ETEST Ella Test

PO Reference

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

Amount Summary

Merchandise 0.00

Freight/Tax/Misc. 0.00 Calculate

Total Amount 0.00 USD

6. **Buyer** - Enter the buyer, this field is case sensitive, so the name must be entered in UPPER case with the first initial of the first name followed by the first 7 letters of the last name and tab out of the field or click on the magnifying glass to select from a list of values
7. Click on the **PO Defaults** link

The **Purchase Order Defaults** window opens:

Purchase Order Defaults

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-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 PFMTP002 FM Finance-Financial Oper Ultimate Use Code

Due Date Original Promise Date

Ship Via BESTWAY Freight Terms Code FOBDEST

Arbitration Freight Charge Method

*Distribute By Quantity One Time Address

Distribution

SpeedChart

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

Chartfields Asset Information

| Dist | Percent | GL Unit | Account | Fund | Dept | Program | Class | Project | Affiliate |
|------|---------|---------|---------|-------|------------|---------|-------|---------|-----------|
| 1 | | 01110 | 520000 | 10000 | 1110000000 | | | | |

OK Cancel Refresh

8. Enter your chartstring information

9. Click **OK**

You are brought back to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd

Copy From Hold From Further Processing

Header ?

*PO Date 11/02/2018 Supplier Search Doc Tol Status Valid

*Supplier VCI/VOWP-001 Supplier Details

*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

*Buyer ETEST Eric John Hoefel

Receipt Status Not Recvd

*Dispatch Method Dispatch

PO Reference

Amount Summary ?

| | |
|---------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

Calculate

Add Items From ?

Catalog Item Search Purchasing Kit

Lines ?

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-------------|--------|------|----------|-------|--------------------|----------|
| 1 | | | | | | 0 | 0.00 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

10. Click on the **Contract** tab

The **Look Up Contract Line** window opens:

Look Up Contract Line

Help

SetID STATE

Contract ID 00000000000000000000000034429

Contract Version 1

Category begins with

Contract Line Nbr =

More Information begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-7 of 7 Last

| Category | Contract Line Nbr | Item ID | More Information |
|----------|-------------------|---------|-------------------------|
| 69551 | 1 | (blank) | IRP/IFTA MANUAL |
| 69551 | 2 | (blank) | CDL MANUAL |
| 69551 | 3 | (blank) | DRIVER'S LICENSE MANUAL |
| 69551 | 4 | (blank) | MOTORCYCLE MANUAL |
| 69551 | 5 | (blank) | SCHOOL BUS MANUAL |
| 69551 | 6 | (blank) | SNOWMOBILE MANUAL |
| 69551 | 7 | (blank) | ATV MANUAL |

14. Select the contract line by clicking on the link

Once you select the contract line the following **Message** MAY appear on the screen:

Message

Override Schedule Quantity with Contract Quantity Scheduled on Line (1) with Description (IRP/IFTA MANUAL)? (10200,436)

Press OK to override schedule quantity with contract shipping template schedule quantity. Press Cancel to use the entered line quantity and schedule quantity.

15. Click OK

Business Unit 01110

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 11/02/2018

*Supplier VCI/VOWP-001

*Supplier ID 0000041408

*Buyer ETEST

Supplier Search

Supplier Details

Vermont Correctional Industries/Vermont

Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method Print

Dispatch

PO Reference DMV MANUALS

Header Details

PO Defaults

PO Activities

Actions

Activity Summary

Add Comments

Add ShipTo Comments

Amount Summary

Merchandise 1,639.77

Freight/Tax/Misc. 0.00

Total Amount 1,639.77 USD

Calculate

Add Items From

Catalog

Item Search

Purchasing Kit

Lines

Details

Ship To/Due Date

Statuses

Item Information


Attributes

BFO

Contract

Receiving

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

| Line | Item | Description | SetID | Contract ID | Contract Version | Contract Line | Category Line |
|------|---|-----------------|-------|--------------------------------|------------------|---------------|---------------|
| 1 |  | IRP/IFTA MANUAL | STATE | 000000000000000000000000034429 | 1 | 1 | |

View Printable Version

Close Short All Lines

*Go to More

Save

Notify

Refresh

Add

Update/Display

16. Click the **+** icon to insert a new line to add an additional contract

The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

17. Change the number of rows to add if you want to add more than 1

18. Click OK

Additional line(s) are added to the PO:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID NEXT
Copy From

PO Status Open
Budget Status Not Chk'd
☐ Hold From Further Processing

▼ Header ?

*PO Date 11/06/2018
*Supplier VCIN/OWP-001
*Supplier ID 0000041408
*Buyer ETEST
PO Reference CPS - STATIONARY & FORMS

Supplier Search
Supplier Details
Vermont Correctional Industries/Vermont
Ella Test

Doc Tol Status Valid
Receipt Status Not Recvd
*Dispatch Method Print
Dispatch

Header Details
PO Defaults
PO Activities
▼ Actions

Activity Summary
Add Comments
Add Ship To Comments

Amount Summary ?

Merchandise 1,639.77
Freight/Tax/Misc. 0.00
Total Amount 1,639.77 USD

Calculate

Add Items From ?

Catalog
Purchasing Kit

Item Search

Lines ?

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

| Line | Item | Description | SetID | Contract ID | Contract Version | Contract Line | Category Line |
|------|------|-----------------|-------|------------------------------|------------------|---------------|---------------|
| 1 | | IRP/IFTA MANUAL | STATE | 0000000000000000000000034429 | 1 | 1 | |
| 2 | | | STATE | | | | |

View Printable Version
Close Short All Lines
*Go to ... More ...

Save Notify Refresh

19. Go through the process of entering the contract number and selecting the appropriate contract line number for each additional PO line.

Once all contract information has been entered,

20. Click on the **Details** tab

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT

Copy From

PO Status Open Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid

*Supplier VCI/VOWP-001 Supplier Details

*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

*Buyer ETEST Ella Test

Receipt Status Not Recvd

*Dispatch Method Print

PO Reference CPS - STATIONARY & FORMS

Amount Summary

| | | |
|---------------------|----------|--|
| Merchandise | 1,639.78 | |
| Freight/Tax/Misc. | 0.00 | <input type="button" value="Calculate"/> |
| Total Amount | 1,639.78 | USD |

PO Defaults (highlighted in red)

Activity Summary
Add Comments
Add ShipTo Comments

Add Items From

Catalog Item Search
Purchasing Kit

Lines

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------|------------------|--------|------|----------|-------------|--------------------|----------|
| 1 | IRP/IFTA MANUAL | | 1.0000 | T | 69551 | 1,639.77000 | 1,639.77 | Approved |
| 2 | 000000000000004890 | BUSINESS CARDS - | 1.0000 | LOT | 69530 | 0.01000 | 0.01 | Approved |

View Printable Version *Go to ... More ...

21. If you want to apply the same chartstring information to all lines, click on the **PO Defaults** link. Otherwise, skip to step 25

The **Purchase Order Defaults** window opens:

Purchase Order Defaults

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-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 PFMTP002 FM Finance-Financial Oper Ultimate Use Code

Due Date Original Promise Date

Ship Via BESTWAY Freight Terms Code FOBDEST

Arbitration Freight Charge Method

*Distribute By Quantity One Time Address

Distribution

SpeedChart

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

Chartfields Asset Information

| Dist | Percent | GL Unit | Account | Fund | Dept | Program | Class | Project | Affiliate |
|------|----------|---------|---------|-------|------------|---------|-------|---------|-----------|
| 1 | 100.0000 | 01110 | 520000 | 10000 | 1110000000 | | | | |

22. Click **OK**

The **PO Default Retrofit** window opens:

PO Default Retrofit

Maintain Purchase Order

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

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-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 7 | First 1-10 of 10 Last

| Apply | Distrib Line | Field Name | Field Value | Apply to All Distributions |
|-------------------------------------|--------------|--------------------|-------------|----------------------------|
| <input type="checkbox"/> | | Ship To | PFMMTP002 | |
| <input type="checkbox"/> | | Ship Via | BESTWAY | |
| <input type="checkbox"/> | | Freight Terms Code | FOBDEST | |
| <input type="checkbox"/> | | Pct | 100 | |
| <input type="checkbox"/> | | GL Unit | 01110 | <input type="checkbox"/> |
| <input type="checkbox"/> | | Account | 520000 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | | Fund | 10000 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | | Dept | 1110000000 | <input type="checkbox"/> |
| <input type="checkbox"/> | | Budget Date | 2019-02-08 | <input type="checkbox"/> |
| <input type="checkbox"/> | | Location | PFMMTP002 | <input type="checkbox"/> |

☒ Select All ☐ Clear All

OK Cancel Refresh

23. Select any fields you want to change or click on **Select All** to choose all fields

24. Click **OK** to override information that was brought in by the contract

You are returned to the **Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT Copy From

PO Status Open Budget Status Not Chkd

☐ Hold From Further Processing

Header ?

*PO Date 11/06/2018 Supplier Search Doc Tot Status Valid

*Supplier VCI/VOWP-001 Supplier Details

*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

*Buyer ETEST Ella Test

PO Reference CPS - STATIONARY & FORMS

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

Amount Summary ?

Merchandise 1,639.78

Freight/Tax/Misc. 0.00

Total Amount 1,639.78 USD

Calculate

Add Items From ?

Catalog Purchasing Kit

Lines ?

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

| Line | Item | Description | PO Qty | UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------|------------------|--------|-----|----------|-------------|--------------------|----------|
| 1 | IRP/IFTA MANUAL | | 1.0000 | T | 69551 | 1,639.77000 | 1,639.77 | Approved |
| 2 | 000000000000004890 | BUSINESS CARDS - | 1.0000 | LOT | 69530 | 0.01000 | 0.01 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save **Notify** **Refresh** **Add** **Update/Display**

25. Adjust the PO Qty & Price fields as appropriate to your situation and in compliance with the contract terms

26. Click **Refresh**

27. Click on the **Header Details** link

The **PO Header Details** page displays:

The screenshot shows the 'PO Header Details' window. It is divided into several sections: 'PO Details', 'Currency', and 'Process Control Option'. In the 'PO Details' section, 'Supplier' is 'VCIN/OWP-001', 'PO Date' is '11/06/2018', 'Budget Status' is 'Not Chk'd', and 'Tax Exempt' is unchecked. The '*PO Type' field contains 'PROD' and the 'Origin' field contains 'FM', both highlighted with red boxes. Other fields include '*Billing Location' (PFMMTP0), 'Billing Address', 'ID', 'Letter of Credit ID', and 'Ship To'. The 'Currency' section shows 'Currency Code' as 'USD', 'Base Currency' as 'USD', 'Exchange Rate' as '1.00000000', 'Rate Date' as '01/01/1900', and 'Rate Type' as 'CRRNT'. The 'Process Control Option' section has 'Dispatch' checked, 'Acknowledgements required for' set to 'Not required', 'Accounting Date' as '11/06/2018', 'Accounting Template' as 'STANDARD', and 'Method' as 'Print'. At the bottom, the 'OK' button is highlighted with a red box, along with 'Cancel' and 'Refresh' buttons.

28. PO Type - Enter by clicking on the [Magnifying Glass](#)

29. Origin - Enter by clicking on the [Magnifying Glass](#)

30. Click [OK](#)

If you receive the following **Message**:

The screenshot shows a 'Message' dialog box with the following text: 'Custom price on line 1, schedule 1. Override with system calculated price? (10200,66)', 'The schedule is marked as having a custom price. The system has calculated a different price than the custom price.', and 'If you choose to not have the system override the custom price, you can see how the system calculated its price by viewing the Value Adjustments for the schedule. If at that time, you want to use the system's price, you can use the button on the value adjustments page to set the current price equal to the system-calculated price.' At the bottom, the 'Yes' and 'No' buttons are highlighted with red boxes.

31. Click [Yes](#) or [No](#) as it applies to the current situation (if you've changed the price on the PO – Click [No](#), also this message will appear for each line on the PO)

You are returned to the **Purchase Order** page:

The screenshot shows the 'Maintain Purchase Order' interface. At the top, it displays 'Business Unit 01110' and 'PO ID NEXT'. Below this, there are fields for 'Copy From' and a 'Hold From Further Processing' checkbox. The 'Header' section includes fields for 'PO Date' (11/06/2018), 'Supplier' (VCIVOWP-001), 'Supplier ID' (0000041408), and 'Buyer' (ETEST). There are also links for 'Supplier Search', 'Supplier Details', and 'Vermont Correctional Industries/Vermont'. The 'Amount Summary' section shows 'Merchandise' (1,644.77), 'Freight/Tax/Misc.' (0.00), and 'Total Amount' (1,644.77 USD). The 'Add Items From' section has 'Catalog' and 'Item Search' options. The 'Lines' section is a table with columns: Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, and Status. It contains two lines: Line 1 (IRP/IFTA MANUAL) and Line 2 (BUSINESS CARDS -). The 'Add Comments' link is highlighted with a red box.

32. Click on the **Add Comments** link to enter comments that relate to the Purchase Order as a whole

Note: It is important to be specific about your delivery requirements as the items may be delivered by an independent company (Example: inside delivery is required to the 3rd floor, only accept deliveries on Tues & Thurs between 12-3, because of loading dock location deliveries cannot be accepted by anything larger than a box truck)

The **PO Header Comments** page displays:

The screenshot shows the 'PO Header Comments' page. It displays 'Business Unit 01110', 'PO ID NEXT', and 'Supplier VCIVOWP-001'. There are dropdowns for '*Sort Method' (Comment Time Stamp) and '*Sort Sequence' (Ascending), with a 'Sort' button. The 'Comments' section has a 'Find | View All' link and 'First', '1 of 1', 'Last' navigation. Below this is a 'Comments' text box with a '+ Add' button highlighted by a red box. There are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section has an 'Attachment' field and buttons for 'Attach', 'View', 'Delete', and 'Email'. At the bottom, it says 'From -> PO 01110-NEXT' and has 'OK', 'Cancel', and 'Refresh' buttons.

33. Click the **+** icon on the right side of the comments text box to add a new comment

PO Header Comments

Business Unit 01110 PO ID NEXT Supplier VCIVOWP-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

CONTRACT TERMS: THIS CONTRACT WILL BE SUBJECT TO REVIEW THROUGHOUT ITS TERM. THE STATE WILL CONSIDER CANCELLATION UPON DISCOVERY THAT A SUPPLIER IS IN VIOLATION OF ANY PORTION OF THE AGREEMENT, INCLUDING AN INABILITY BY THE SUPPLIER TO PROVIDE THE PRODUCTS, SUPPORT, AND/OR SERVICE OFFERED IN THEIR RESPONSE.

☒ Send to Supplier ☐ Show at Receipt

☐ Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> PO 01110-NEXT

OK Cancel Refresh

34. Enter comments

35. Check the **Send to Supplier** checkbox. This allows the comments to show on the printed copy of the PO to send to the supplier

Once all comments have been entered,

36. Click **OK**

You are returned to the **Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd

Copy From Hold From Further Processing

Header

*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid

*Supplier VCIVOWP-001 Supplier Details

*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

*Buyer ETEST Ella Test Receipt Status Not Recvd

PO Reference CPS - STATIONARY & FORMS *Dispatch Method Print Dispatch

Amount Summary

Merchandise 1,644.77

Freight/Tax/Misc. 0.00

Total Amount 1,644.77 USD Calculate

Add Items From

Catalog Item Search

Lines

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------|------------------|----------|------|----------|-------------|--------------------|----------|
| 1 | IRP/IFTA MANUAL | | 1.0000 | T | 69551 | 1,639.77000 | 1,639.77 | Approved |
| 2 | 000000000000004690 | BUSINESS CARDS - | 500.0000 | LOT | 69530 | 0.01000 | 5.00 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

37. Click the **Line Comments** icon to enter comments specific to the line

38. Click the **Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

Schedules

Unit 01110 Supplier VCIN/OWP-001 PO Status Open
PO ID NEXT PO Date 11/06/2018

Return to Main Page

Lines Find | View All First 1 of 2 Last

| Line | Item | IRP/IFTA MANUAL | PO Qty | 1.0000 T | Merchandise Amt | 1,639.77 USD |
|------|------|-----------------|--------|----------|-----------------|--------------|
| 1 | | | | | | |

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 | 12/06/2018 | | 1.0000 | 1,639.77000 | 1,639.77 | Active |

Add Ship To Comments

Save Notify Refresh Add Update/Display

39. The **Due Date** normally defaults in 30 days out, change this as appropriate to your situation

40. **Ship To** - Enter a ship to location:

VISION Purchasing “Ship To” locations have a specific format

Example: PFMTP001

P = Purchasing

FM = Origin Code for the Agency/Dept

MTP = Abbreviation for city/town

001 = First location for that origin code in the city/town.

41. Click the **Distributions/Chartfields** icon

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier VCIN/OWP-001
PO ID NEXT Item 000000000000004890

Line 2
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

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

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

| Dist | Status | Percent | PO Qty | Merchandise Amount | Currency | *GL Unit | *Account | Fund | Dept | Program | Class | Project |
|------|--------|----------|----------|--------------------|----------|----------|----------|-------|------------|---------|-------|---------|
| 1 | Open | 100.0000 | 500.0000 | 5.00 | USD | 01110 | 517000 | 10000 | 1110030000 | | | |

OK Cancel Refresh

42. The **Distribute by** field defaults as **Quantity** change it to **Amount** as appropriate to the situation

43. Enter your department’s Chartfield information specific to the purchase

44. Click **OK**

45. Complete the Schedule and Distribution pages for each line of the PO

Once you are back on the **Schedules** page,

46. Click [Save](#)

The following **Message** will open for each line of the PO if the Price or Quantity has been changed:

Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

OK

Cancel

47. Always Click [OK](#) to this message

A PO ID number is assigned.

48. Click the [Return to Main Page](#) link

The **Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID 0000000939

Copy From

PO Status Open

Budget Status Not Chk'd

Hold From Further Processing

Header

*PO Date 11/06/2018

*Supplier VCI/VOWP-001

*Supplier ID 0000041408

*Buyer ETEST

PO Reference CPS - STATIONARY & FORMS

Header Details

PO Defaults

PO Activities

Activity Summary

Edit Comments

Add ShipTo Comments

Supplier Search

Supplier Details

Vermont Correctional Industries/Vermont

Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method Print

Dispatch

Amount Summary

Merchandise 1,644.77

Freight/Tax/Misc. 0.00

Total Amount 1,644.77 USD

Calculate

Add Items From

Catalog

Purchasing Kit

Item Search

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

Personalize

Find

View All

First

1-2 of 2

Last

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------|------------------|----------|------|----------|------------|--------------------|----------|
| 1 | | IRP/IFTA MANUAL | 1.0000 | T | 69551 | 1639.77000 | 1,639.77 | Approved |
| 2 | 000000000000004890 | BUSINESS CARDS - | 500.0000 | LOT | 69530 | 0.01000 | 5.00 | Approved |

View Printable Version

Close Short All Lines

*Go to ... More ...

Save

Notify

Refresh

Add

Update/Display

Note: Complete the following steps if you plan to post multiple vouchers against the PO:

49. Click on the [Show all columns](#) icon

Maintain Purchase Order

Purchase Order

Business Unit 02150

PO ID 0000034063

Copy From

PO Status Dispatched

Budget Status Valid

☐ Hold From Further Processing

Header

*PO Date 05/10/2019

*Supplier WALSELECT-001

*Supplier ID 0000001569

*Buyer TMCSWEEN

PO Reference AIR-151

Supplier Search

Supplier Details

Walsh Electric Supply Co. Inc.

Tiffany Jean Ann Davis

Header Details

PO Defaults

PO Activities

Requisitions

▼ Actions

Activity Summary

Add Comments

Add ShipTo Comments

Document Status

Doc Tol Status Valid

Backorder Status Not Backordered

Create BackOrder

Receipt Status Not Recvd

*Dispatch Method

Dispatch

Amount Summary

Merchandise 572.37

Freight/Tax/Misc. 0.00

Total Amount 572.37 USD

Encumbrance Balance 83.12 USD

Calculate

Add Items From

Catalog

Item Search

Select Lines To Display

Search for Lines

Line

To

Retrieve

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | Due Date | Ship To | Price |
|------|------|------------------------|--------|--------|----------|-------|--------------------|-----------------|------------|------------|-----------|
| 1 | | LED LAMPS AND FIXTURES | | 1.0000 | EA | 28551 | 572.37000 | 572.37 Approved | 06/09/2019 | PMILSBRL04 | 572.37000 |

View Printable Version

Close Short All Lines

*Go to

Save

Return to Search

Notify

Refresh

| Item | Description | Unit | Quantity | Price | Total Price |
|----------|-------------|------|----------|-------|-------------|
| Standard | | | | | |

52. Scroll back to the left and click **Save**

Enter a Purchase Order Against a Contract is Complete

Add Attachments to Purchase Order Header or Lines

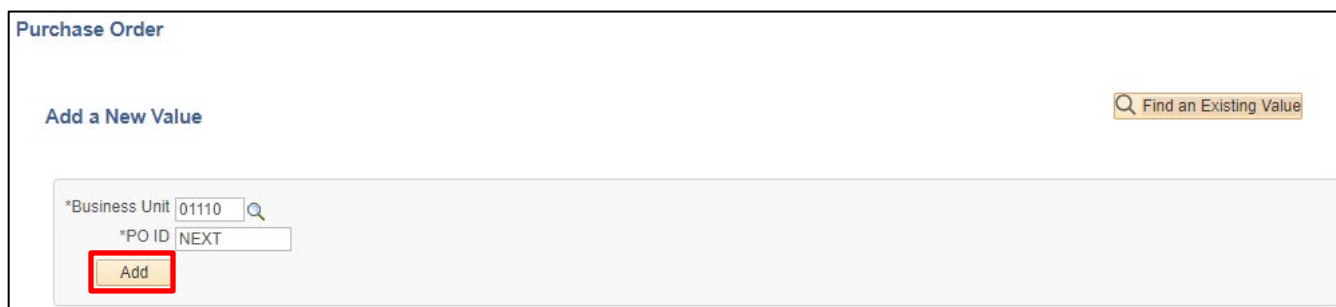
Situations when this function is used: When creating a Purchase Order, users may need to add attachments at the Header or Line level.

Note: the following steps address only adding the attachment, not creating the Purchase Order in entirety. Other training manual topics address the steps for Creating Purchase Orders within this document.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

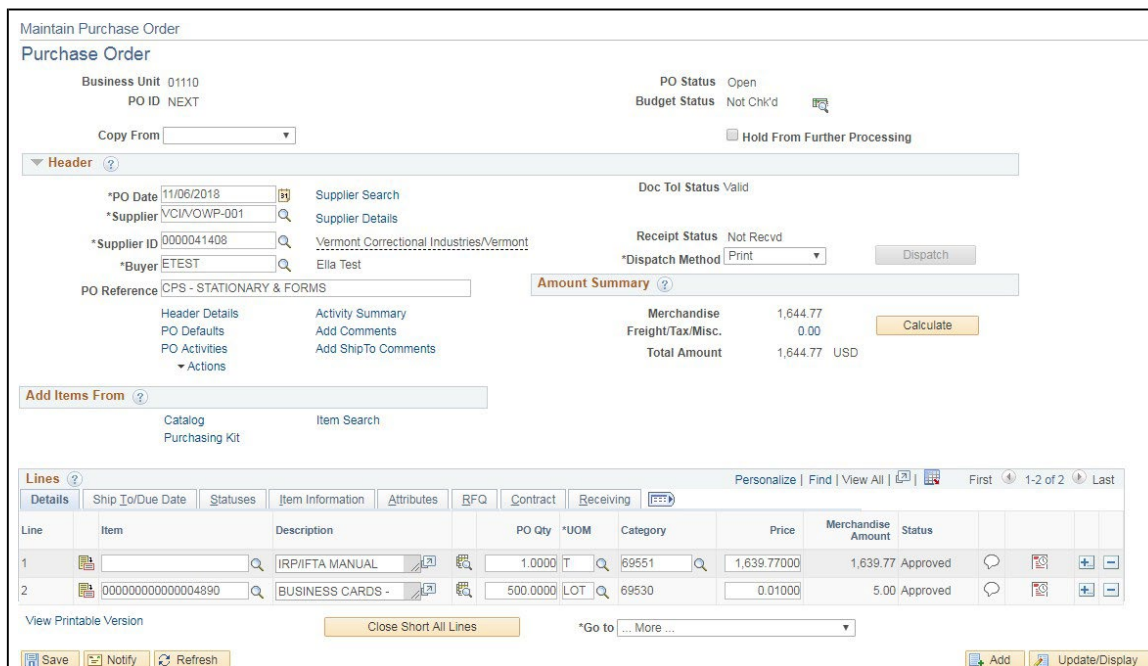
Navigator Menu navigation: Purchasing > Purchase Orders > Purchase Order Add/Update

The **Purchase Order** page displays:



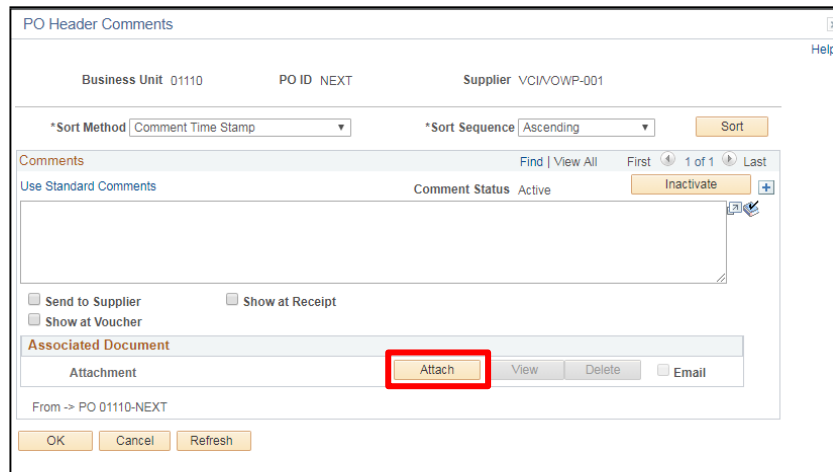
1. Click **Add**

The **Maintain Purchase Order** page displays:



2. Click on the **Add Comments** link to enter an attachment that relate to the Purchase Order as a whole

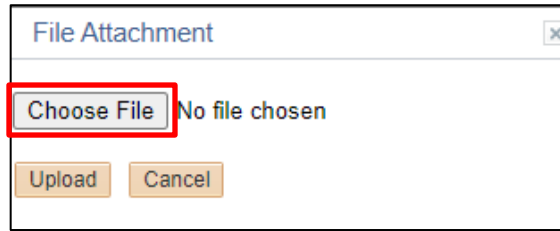
The **PO Header Comments** window opens:



The PO Header Comments window displays fields for Business Unit (01110), PO ID (NEXT), and Supplier (VCIVOWP-001). It includes sorting options for Comment Time Stamp and Ascending order. A comments list is shown with a status of Active. Below the list, there are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section contains an 'Attachment' field with an 'Attach' button highlighted by a red box. Other buttons include 'View', 'Delete', 'Email', 'OK', 'Cancel', and 'Refresh'.

3. Click **Attach** within the Associated Document box

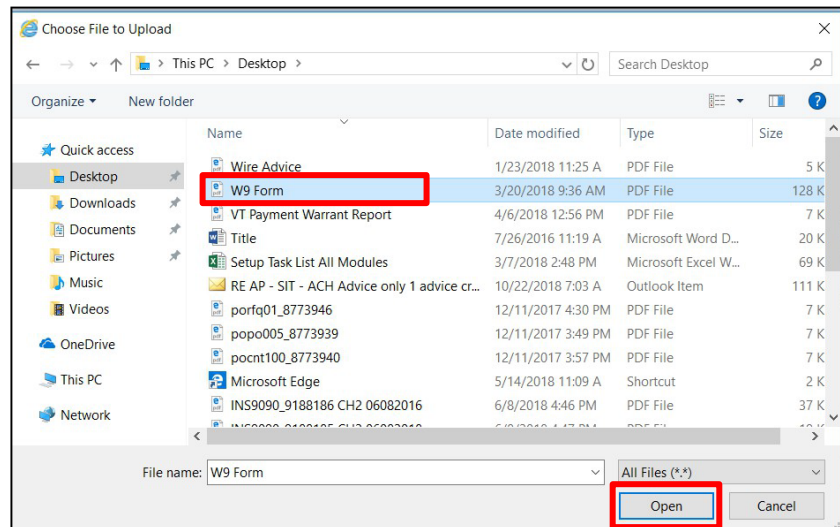
The **File Attachment** box opens:



The File Attachment box shows a 'Choose File' button highlighted by a red box, followed by the text 'No file chosen'. At the bottom, there are 'Upload' and 'Cancel' buttons.

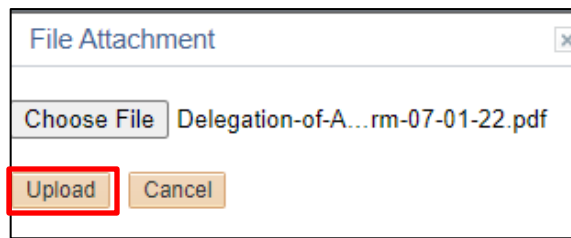
4. Click **Chose File** to search for files to choose to upload as an attachment

Note that you can select files on local or network drives that your computer has access to:



5. Select the file and click **Open**

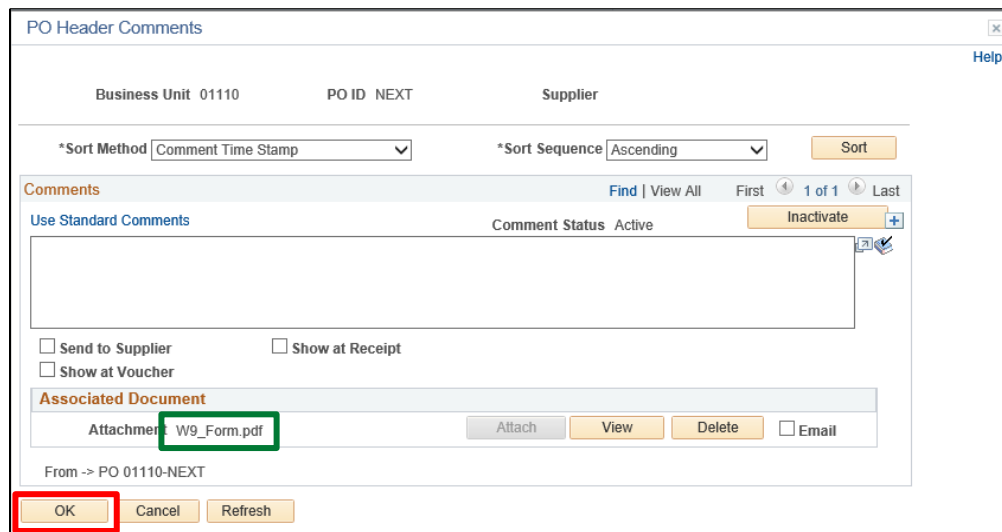
You will be returned to the **File Attachment** page with the file name selected defaulted in:



A dialog box titled "File Attachment" with a close button (X) in the top right corner. It contains a "Choose File" button, a text field displaying "Delegation-of-A...rm-07-01-22.pdf", and two buttons at the bottom: "Upload" (highlighted with a red box) and "Cancel".

6. Click **Upload** to attach your file to the Purchase Order

You are returned to the **PO Header Comments** window:

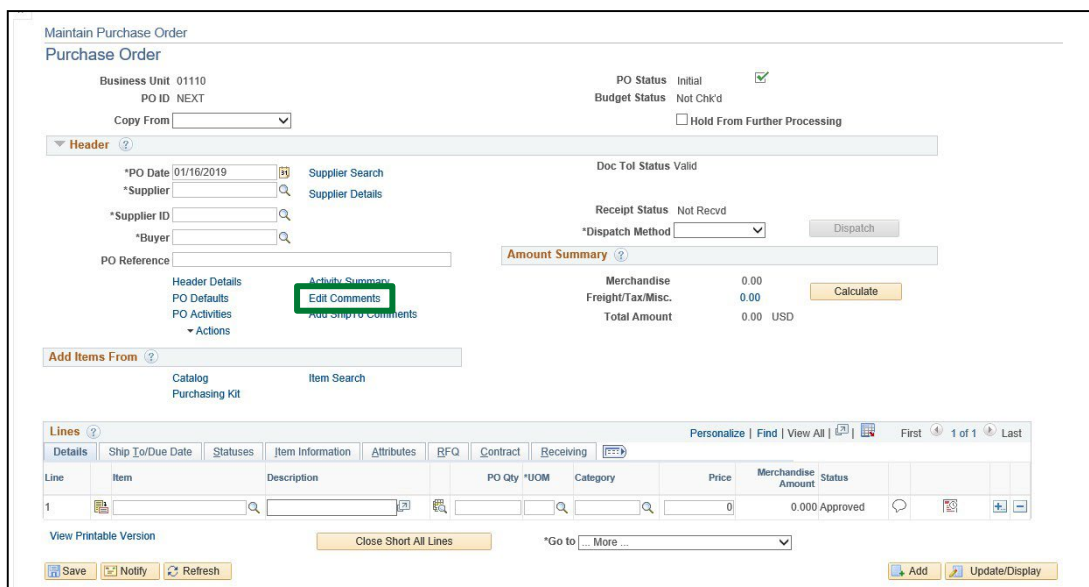


A window titled "PO Header Comments" with a close button (X) and a "Help" link. It displays fields for "Business Unit 01110", "PO ID NEXT", and "Supplier". Below these are dropdowns for "*Sort Method" (set to "Comment Time Stamp") and "*Sort Sequence" (set to "Ascending"), with a "Sort" button. A "Comments" section includes a "Find | View All" link, "First 1 of 1 Last" navigation, and an "Inactivate" button. There are checkboxes for "Send to Supplier", "Show at Receipt", and "Show at Voucher". An "Associated Document" section shows an attachment "W9_Form.pdf" with "Attach", "View", "Delete", and "Email" buttons. At the bottom, it says "From -> PO 01110-NEXT" and has "OK" (highlighted with a red box), "Cancel", and "Refresh" buttons.

The attachment is displayed in the Associated Document section.

7. Click **OK**

The **Purchase Order** page displays:



A complex "Purchase Order" page. The top section includes "Business Unit 01110", "PO ID NEXT", "Copy From" dropdown, "PO Status Initial" (checked), "Budget Status Not Chk'd", and "Hold From Further Processing" checkbox. Below is a "Header" section with search fields for "PO Date", "Supplier", "Supplier ID", and "Buyer", along with "Supplier Search" and "Supplier Details" links. A "Doc Tol Status Valid" section is also present. The "Amount Summary" section shows "Merchandise 0.00", "Freight/Tax/Misc. 0.00", and "Total Amount 0.00 USD" with a "Calculate" button. A "Lines" section at the bottom has tabs for "Details", "Ship To/Due Date", "Statuses", "Item Information", "Attributes", "B/FQ", "Contract", "Receiving", and "Personalize". It displays a table with columns: Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, and Status. The first line is visible with "Line 1", "Item", "Description", "PO Qty", "UOM", "Category", "Price 0", "Merchandise Amount 0.000", and "Status Approved". Navigation and action buttons like "Save", "Notify", "Refresh", "Add", and "Update/Display" are at the bottom.

The link has changed to **Edit Comments**.

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT PO Status Initial Budget Status Not Chk'd

Copy From [v] Hold From Further Processing

Header

*PO Date 01/16/2019 Supplier Search

*Supplier [v] Supplier Details

*Supplier ID [v]

*Buyer [v]

PO Reference

Header Details Activity Summary

PO Defaults Edit Comments

PO Activities Add ShipTo Comments

Actions

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method [v] Dispatch

Amount Summary

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Calculate

Add Items From

Catalog Item Search

Lines

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-------------|--------|------|----------|-------|--------------------|----------|
| 1 | | | | | | 0 | 0.00 | Approved |

View Printable Version

Close Short All Lines

*Go to More ...

Save Notify Refresh

Add Update/Display

8. Click the **Line Comments** icon to enter comments specific to the line

The PO Comments page displays:

PO Line Comments

Business Unit 01110 PO ID NEXT Supplier

Line 1

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find View All First 1 of 1 Last

Use Standard Comments

Use Item Specifications

Comment Status Active Inactivate

Send to Supplier Show at Receipt

Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> PO 01110-NEXT

OK Cancel Refresh

9. Click **Attach** within the **Associated Document** box

The **File Attachment** window opens:

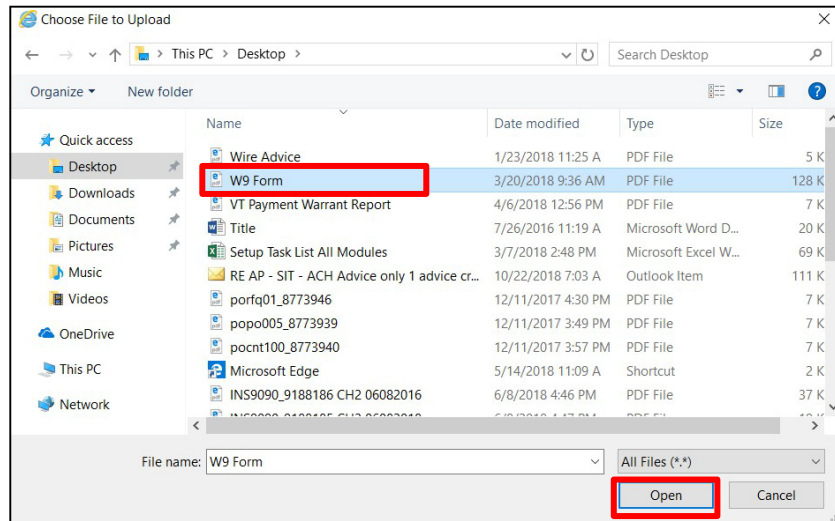
File Attachment

Choose File No file chosen

Upload Cancel

10. Click **Chose File** to search for files to choose to upload as an attachment

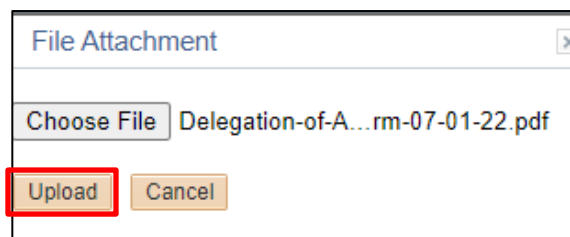
Note that you can select files on local or network drives that your computer has access to:



11. Select the file

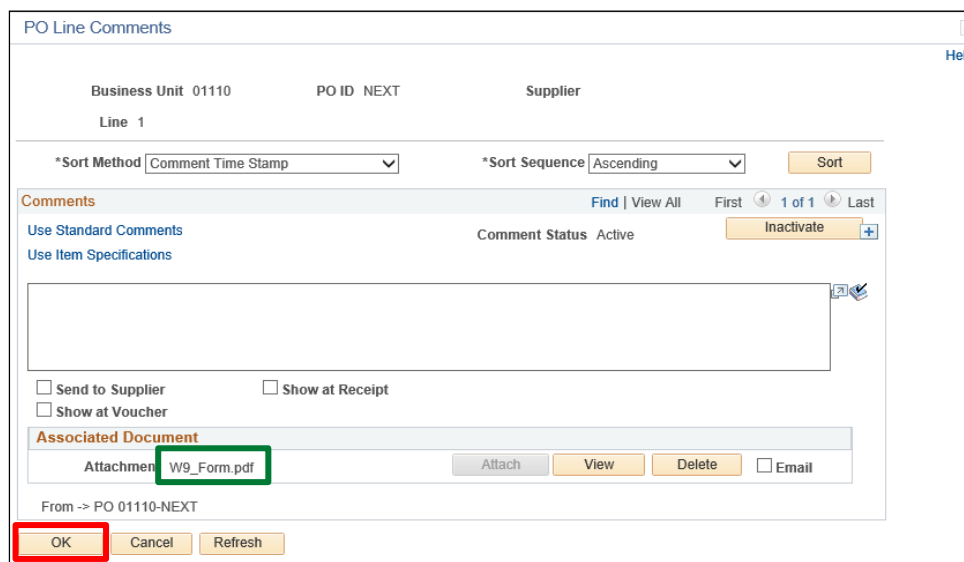
12. Click **Open**

You will be returned to the **File Attachment** window with the file name selected defaulted in:



13. Click **Upload** to attach your file to the Purchase Order

You are returned to the **PO Lines Comment** page:



The attachment is displayed in the Associated Document section.

14. Click **OK**

The **Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID NEXT

Copy From

PO Status Initial

Budget Status Not Chk'd

Hold From Further Processing

Header

*PO Date 01/16/2019

*Supplier

*Supplier ID

*Buyer

PO Reference

Supplier Search

Supplier Details

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method

Dispatch

Amount Summary

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Calculate

Header Details

Activity Summary

PO Defaults

Edit Comments

PO Activities

Add ShipTo Comments

Actions

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

0

0.000

Approved

View Printable Version

Close Short All Lines

*Go to More

Save

Notify

Refresh

Add

Update/Display

The **Line Comments** icon updated to show there is an attachment.

Add Attachments to Purchase Order Header or Lines is Complete

Enter a Purchase Order against a Contract with Split Funding

Situations when this function is used: When making payments on contracts for services, products, and construction regardless of dollar amount in accordance with Bulletin 3.5 and VISION Procedure #3.

Note: *In this exercise we are demonstrating the best way to enter a purchase order against a contract that has multiple lines, but not all the contract lines are needed.*

Purchase Orders must be approved, have a valid budget check, and dispatched in order to be used in a Voucher.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:



Purchase Order

Add a New Value Find an Existing Value

*Business Unit 01110

*PO ID NEXT

Add

1. Click **Add**

The **Purchase Order** page displays:

The following information defaults in: PO Status = Initial, Budget Status = Not Checked and PO Date = Current Date.

2. Supplier Short Name or Supplier ID# - Enter one or the other

If entering the number be sure to include all the leading zero's, click the Refresh button at the bottom of the page and Supplier name automatically populates **or** open a new window and use the Vendor pages for look up

The Supplier Address for the Contract will default from the Supplier record. There will be no ability in VISION to change the Supplier Address directly on a Contract. To update the supplier address on the Purchase Order, Click the Supplier Search hyperlink to select a different address option

3. Click the [Supplier Details](#) link to update the Supplier Address number on the Purchase Order

The **PO Supplier Information** page displays:

4. Click on the **Magnifying Glass** to see the supplier addresses available and select an address
5. Click **OK**

6. **Buyer** - Enter the buyer, this field is case sensitive, so the name must be entered in UPPER case with the first initial of the first name followed by the first 7 letters of the last name and tab out of the field or click on the magnifying glass to select from a list of values
7. Click on the **Contract** tab

8. **Contract ID** - Enter the contract ID or click the **Magnifying Glass** to select from a list:

| Supplier Set ID | Supplier ID | Contract ID | Short Supplier Name | Contract Status | Description | Contract Beginning Date | Expire Date |
|-----------------|-------------|-------------------------------|---------------------|-----------------|------------------------------|-------------------------|-------------|
| STATE | 0000041408 | 00000000000000000000000034429 | VC/VO/WP-001 | Approved | DMV MANUALS | 08/01/2017 | 07/31/2019 |
| STATE | 0000041408 | 00000000000000000000000031144 | VC/VO/WP-001 | Approved | CPS - STATIONARY & FORMS | 03/31/2016 | 04/01/2019 |
| STATE | 0000041408 | 00000000000000000000000030918 | VC/VO/WP-001 | Approved | CPS-HIGHWAY SIGNS AND ACCESS | 03/01/2016 | 02/28/2019 |

9. Click on the **Contract ID** link to select a contract

Note: The following must be true for a contract to be available to use:

- **The Contract must be in Approved Status**
- **The Contract Beginning date must be less than or equal to the PO Date**
- **The Contract Expire Date must be equal to or greater than the PO Date**

If an invoice for a product or service is received after the contract has expired, but the order for the product or service was performed before the contract expiration date, you can and should use the contract. Please refer to the [Enter a Purchase Order against an Expired Contract](#) exercise in this manual.

| Line | Item | Description | SetID | Contract ID | Contract Version | Contract Line | Category Line | Release | Milestone Line | GPO ID |
|------|------|-------------|-------|-------------------------------|------------------|---------------|---------------|---------|----------------|--------|
| 1 | | | STATE | 00000000000000000000000034429 | | 1 | | | | |

10. Click the **Magnifying Glass** next to the Contract Line field to select the appropriate contract line

Additional line(s) are added to the PO:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd
Copy From [] Hold From Further Processing

Header ?

*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid
*Supplier VICI/VOWP-001 Supplier Details
*Supplier ID 0000041408 Vermont Correctional Industries/Vermont
*Buyer ETEST Ella Test Receipt Status Not Recvd
*Dispatch Method Print Dispatch

PO Reference CPS - STATIONARY & FORMS

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

Amount Summary ?

| | | |
|---------------------|-------------|-----------|
| Merchandise | 0.01 | |
| Freight/Tax/Misc. | 0.00 | Calculate |
| Total Amount | 0.01 | USD |

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

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

| Line | Item | Description | SetID | Contract ID | Contract Version | Contract Line | Category Line |
|------|--------------------|------------------|-------|------------------------------|------------------|---------------|---------------|
| 1 | 000000000000004890 | BUSINESS CARDS - | STATE | 0000000000000000000000031144 | 1 | 1 | |
| 2 | | | STATE | | | | |

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh

17. Go through the process of entering the contract number and selecting the appropriate contract line number for each additional PO line.

Once all contract information has been entered,

18. Click on the **Details** tab

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd
Copy From [] Hold From Further Processing

Header ?

*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid
*Supplier VICI/VOWP-001 Supplier Details
*Supplier ID 0000041408 Vermont Correctional Industries/Vermont
*Buyer ETEST Ella Test Receipt Status Not Recvd
*Dispatch Method Print Dispatch

PO Reference CPS - STATIONARY & FORMS

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

Amount Summary ?

| | | |
|---------------------|--------------|-----------|
| Merchandise | 10.00 | |
| Freight/Tax/Misc. | 0.00 | Calculate |
| Total Amount | 10.00 | USD |

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

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

| Line | Item | Description | PO Qty | UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------|------------------|----------|-----|----------|---------|--------------------|----------|
| 1 | 000000000000004890 | BUSINESS CARDS - | 500.0000 | LOT | 69530 | 0.01000 | 5.00 | Approved |
| 2 | 000000000000004570 | LETTERHEAD - | 500.0000 | T | 69530 | 0.01000 | 5.00 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

19. Adjust the PO Qty & Price fields as appropriate to your situation and in compliance with the contract terms

20. Click **Refresh**

21. Click on the **Header Details** link

The **PO Header Details** page displays:

22. PO Type - Enter by clicking on the **Magnifying Glass**

23. Origin - Enter by clicking on the **Magnifying Glass**

24. Click **OK**

If you receive the following **Message**:

25. Click **Yes or **No** as it applies to the current situation (if you've changed the price on the PO – Click **No**, also this message will appear for each line on the PO)**

| Line | Item | Description | PO Qty | UOM | Category | Price | Merchandise Amount | Status | Icons |
|------|--------------------|------------------|----------|-----|----------|---------|--------------------|----------|-----------------|
| 1 | 000000000000004890 | BUSINESS CARDS - | 500.0000 | LOT | 69530 | 0.01000 | 5.00 | Approved | [Schedule Icon] |
| 2 | 000000000000004571 | LETTERHEAD, | 500.0000 | T | 69530 | 0.01000 | 5.00 | Approved | [Schedule Icon] |

26. Click the **Schedule icon**

The **Schedules** page displays:

Maintain Purchase Order
Schedules

Unit 01110 Supplier VCI/VOWP-001 PO Status Open
PO ID NEXT PO Date 01/22/2019

Return to Main Page

Lines

| Line | Item | PO Qty | Merchandise Amt |
|--------|---|--------------|-----------------|
| Line 1 | 000000000000004890 BUSINESS CARDS - PRINTED IN GREEN AND BLACK INK. SIZE: 3.5" X 2". STOCK: RECYCLED 100 LB. BRISTOL, WHITE. SEE ATTACHED PRICE LIST. | 500.0000 LOT | 5.00 USD |

Schedules

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |
|-------|------------|-----------|----------|---------|--------------------|--------|
| 1 | 02/21/2019 | PFMMTP002 | 500.0000 | 0.01000 | 5.00 | Active |

Add ShipTo Comments

Save Notify Refresh Add Update/Display

27. The **Due Date** normally defaults in 30 days out, change this as appropriate to your situation

28. **Ship To** - Enter a ship to location:

VISION Purchasing "Ship To" locations have a specific format

Example: PFMMTP001 - P = Purchasing; FM = Origin Code for the Agency/Dept; MTP = Abbreviation for city/town; 001 = First location for that origin code in the city/town

29. Click the **Distributions/Chartfields** icon

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier VCI/VOWP-001
PO ID 0000000940 Item 00000000000004570

Line 2
Schedule 1 Status Active

*Distribute By: Quantity

SpeedChart Multi-SpeedCharts

| Dist | Status | Percent | PO Qty | Merchandise Amount | Currency | *GL Unit | *Account | Fund | Dept | Program | Class | Project |
|------|--------|---------|----------|--------------------|----------|----------|----------|-------|------------|---------|-------|---------|
| 1 | Open | 50.0000 | 250.0000 | 2.50 | USD | 01110 | 517000 | 10000 | 1110003000 | | | |
| 2 | Open | 50.0000 | 250.0000 | 2.50 | USD | 01110 | 517000 | 10000 | 1110003000 | | | |

OK Cancel Refresh

30. The Distribute by field defaults as **Quantity**, you can change it to **Amount** IF appropriate to the situation

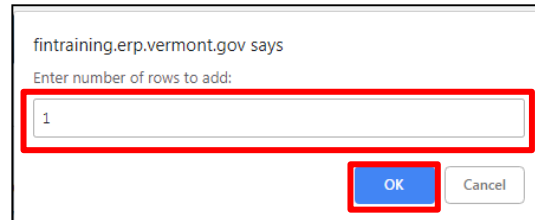
31. The Percent field is 100.0000, for a split funding PO, change the percent field to the needed value for distribution line 1

32. Enter Chartfield information

The PO Qty and Amount automatically recalculate to reflect the percentage that was entered.

33. Click the **+** icon to insert an additional row(s) and the remaining percentage will default in

The following **Message** opens:



fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

34. Adjust the number of lines if desired

35. Click **OK**

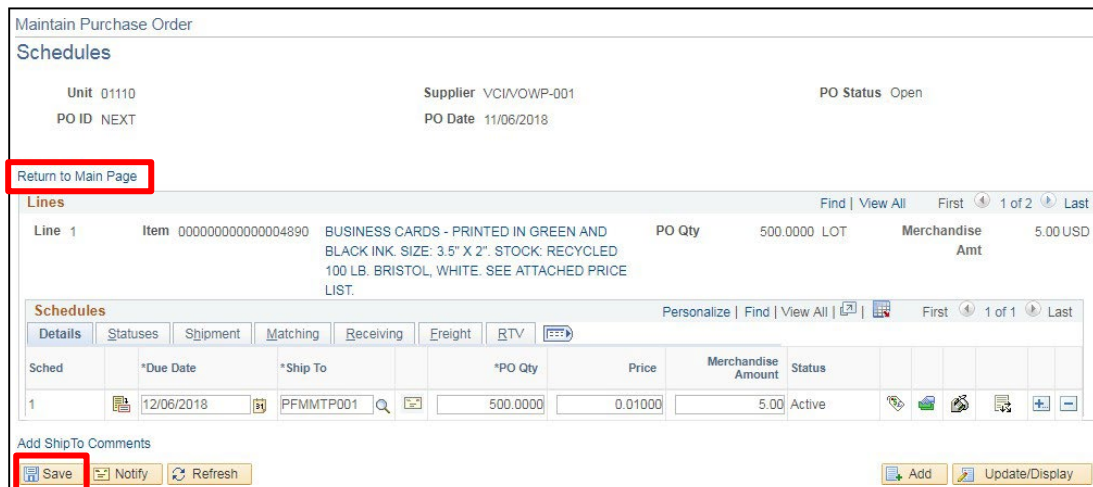
The second distribution opens for Line 1 of the purchase order. The remaining percent has populated the Percent field. The PO Qty and Amount have also defaulted in according to the percentage for the line.

36. Enter Chartfield information for the second distribution.

If there are more than two funding sources change the percentage and continue to insert rows using the **+** icon at the far right of the row.

37. Click **OK** once all funding information has been entered

You are returned to the **Schedules** page:



Maintain Purchase Order

Schedules

Unit 01110 Supplier VCI/VOWP-001 PO Status Open

PO ID NEXT PO Date 11/06/2018

[Return to Main Page](#)

Lines

| Line | Item | Description | PO Qty | LOT | Merchandise Amt |
|------|--------------------|--|----------|-----|-----------------|
| 1 | 000000000000004890 | BUSINESS CARDS - PRINTED IN GREEN AND BLACK INK. SIZE: 3.5" X 2". STOCK: RECYCLED 100 LB. BRISTOL, WHITE. SEE ATTACHED PRICE LIST. | 500.0000 | | 5.00 USD |

Schedules

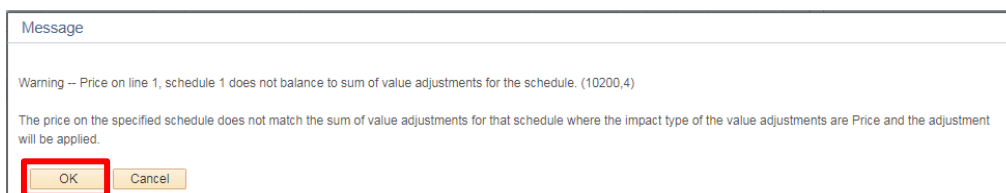
| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |
|-------|------------|-----------|----------|---------|--------------------|--------|
| 1 | 12/06/2018 | PFMMTP001 | 500.0000 | 0.01000 | 5.00 | Active |

Add ShipTo Comments

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

38. Click **Save**

The following **Message** may open for each line on the PO:



Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

OK Cancel

39. Click **OK**

40. Click on the **Return to Main Page** link

You are returned to the **Maintain Purchase Order** page:

41. Click **Save**

Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).

Follow specific controls in place in your department for approval and budget checking.

As noted at the beginning of this lesson, a PO must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch PO's. Instructions on how to dispatch PO's manually can be found in the [Purchase Orders 102 manual](#).

Entering a PO against a Contract with Split Funding is Complete

Enter a Purchase Order Against an Expired Contract

Situations when this function is used: Occasionally an invoice is received for work done under a contract or products ordered on a contract that may have since expired. In order to pay the invoice, you need to enter a purchase order to draw down on the contract.

Note: *The only way to draw down on an expired contract is to change the PO Date to a date that is prior to the expiration date on the contract.*

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

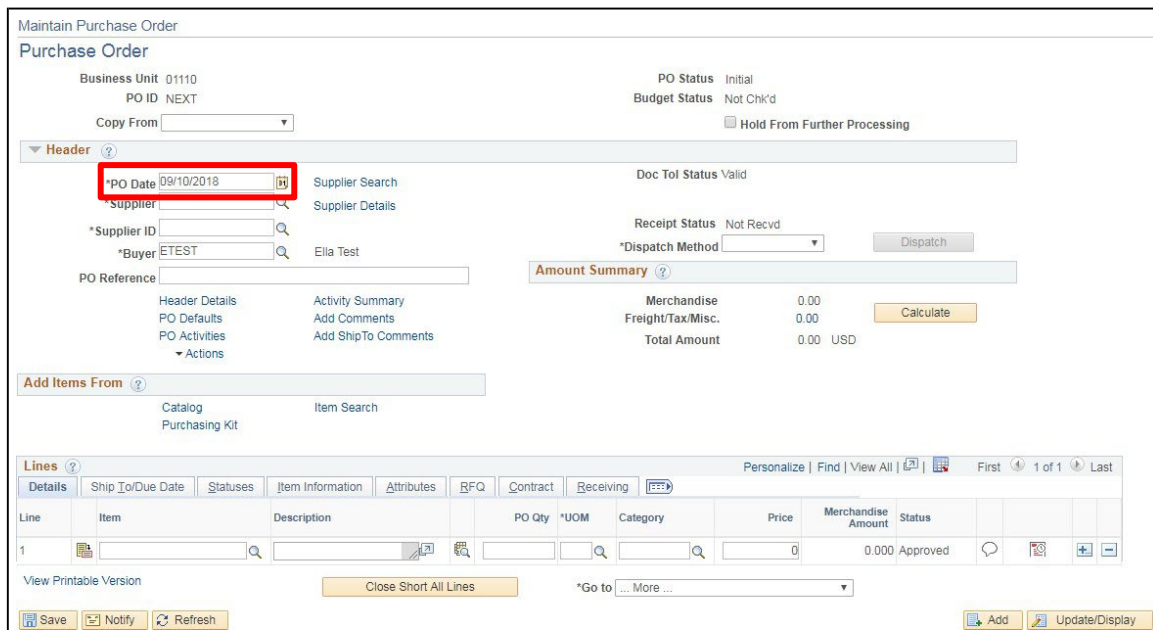
Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:



1. Click **Add**

The **Maintain Purchase Order** page displays:



The following information defaults in: PO Status = Initial, Budget Status = Not Checked, and PO Date = Current Date (*Remember, to enter against an expired contract, this date must be changed to a date that is prior to the expiration date on the contract*)

2. Change the **PO Date** to before the contract expiration date

The following **Message** may appear:

Message

Warning -- date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

OK

3. Click **OK**

In the **Header** section of the **Maintain Purchase Order** page:

▼ Header ?

*PO Date 09/10/2018 Supplier Search Doc Tol Status Valid

*Supplier WBMAISONCOI-001 Supplier Details

*Supplier ID 0000283240 W.B. Mason Co., Inc.

*Buyer PO Reference

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

Amount Summary ?

| | |
|-------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

Calculate

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

▼ Actions

4. Enter the **Supplier ID** or open a new window and use the Supplier pages to look up a Supplier ID
5. Click on the **Supplier Details** link to Verify the Supplier Address with the invoice received

PO Supplier Information

Maintain Purchase Order

Supplier Details -- W.B. Mason Co., Inc.

Business Unit 01110 PO ID NEXT Supplier WBMAISONCOI-001

*Location MULTIPLE Supplier Information

*Address 1 Address

Contact

Salesperson

Supplier Details Message

Country USA United States

Address 1 68 Nesti Drive

Address 2

Address 3

City South Burlington

County

State VT Vermont

Postal 05403

NET30

Inv Date

Net 30

888/926-2766

Look Up Address

Cancel

Search Results

| Supplier ID | Address Sequence Number | Description |
|-------------|-------------------------|------------------------------|
| 0000283240 | 1 | Remit/Order South Burlington |
| 0000283240 | 2 | Remit/Order Boston |

OK Cancel Refresh

6. Select the **Supplier Remit to Address** that matches the invoice received
7. Click **OK**

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 05/30/2018

*Supplier WBMASONCOI-001

*Supplier ID 0000283240

*Buyer ETEST

Supplier Search

Supplier Details

W.B. Mason Co., Inc.

Ella Test

Doc ToI Status Valid

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

PO Reference

Header Details

PO Defaults

PO Activities

▼ Actions

Activity Summary

Add Comments

Add ShipTo Comments

Amount Summary

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Calculate

Add Items From

Catalog

Purchasing Kit

Item Search

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

Personalize

Find

View All

First

1 of 1

Last

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | | | |
|------|---------------|---------------|---------------|---------------|---------------|-------|--------------------|----------|---------------|---------------|---------------|
| 1 | | | | | | 0 | 0.000 | Approved | | | |

View Printable Version

Close Short All Lines

*Go to ... More ...

Save

Notify

Refresh

Add

Update/Display

- The **Copy Purchase Order from Contract** page displays:

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID STATE

Supplier WBMASONCOI-001

Contract ID

Supplier ID 0000283240

☐ Allow Open Item Contract Only

Master Contract

Search

Select Contract

Personalize | Find | View All |

First 1 of 1 Last

Contracts

More Details

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

OK

Cancel

Refresh

- Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID STATE
Supplier WBMASONCOI-001

Contract ID 000000000000000000031783
Supplier ID 0000283240

☐ Allow Open Item Contract Only Master Contract

Search

Select Contract

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

Contracts More Details

| Select | SetID | Contract | Description | Supplier ID | Begin Date | Expire Date |
|--------------------------|-------|--------------------------|---------------------------|-------------|------------|-------------|
| <input type="checkbox"/> | STATE | 000000000000000000031783 | CPS-ALLSTEEL MODULAR FURN | 0000283240 | 10/01/2016 | 09/30/2018 |

OK Cancel Refresh

- Page 44 of 86

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT
Copy From

PO Status Open Budget Status Not Chk'd
☐ Hold From Further Processing

Header

*PO Date 09/10/2018 Supplier Search Doc Tol Status Valid
*Supplier WBMASONCOI-001 Supplier Details
*Supplier ID 0000283240 W.B. Mason Co., Inc.
*Buyer ETEST Ella Test
PO Reference CPS-ALLSTEEL MODULAR FURN

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

Receipt Status Not Recvd
*Dispatch Method Print Dispatch

Amount Summary

Merchandise 85.01
Freight/Tax/Misc. 0.00
Total Amount 85.01 USD

Calculate

Add Items From

Catalog Item Search
Purchasing Kit

Lines

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|------------------|--------|------|----------|----------|--------------------|----------|
| 1 | | ALLSTEEL MODULAR | 1.0000 | EA | 42554 | 0.01000 | 0.01 | Approved |
| 2 | | RECONFIGURATION | 1.0000 | HR | 42554 | 45.00000 | 45.00 | Approved |
| 3 | | DESIGN | 1.0000 | HR | 42554 | 40.00000 | 40.00 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

14. Click on the **Contract** tab

The **Contract ID** and **Contract line(s)** display:

Lines

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

| Line | Item | Description | SetID | Contract ID | Contract Version | Contract Line | Category Line |
|------|------|------------------|-------|------------------------------|------------------|---------------|---------------|
| 1 | | ALLSTEEL MODULAR | STATE | 0000000000000000000000031783 | 1 | 1 | |
| 2 | | RECONFIGURATION | STATE | 0000000000000000000000031783 | 1 | 2 | |
| 3 | | DESIGN | STATE | 0000000000000000000000031783 | 1 | 3 | |

Remember, the contract must be in **Approved** status to be available for use.

15. Click the **Details** tab and continue entering the PO information as you normally would

Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).

Follow specific controls in place in your department for approval and budget checking.

A PO must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch PO's. Instructions on how to dispatch PO's manually can be found in the [Purchase Orders 102 manual](#).

Entering a PO against an Expired Contract is Complete

Copy an Existing Purchase Order

Situations when this function is used: A purchase order is entered every month for an order or service that occurs each month. An existing purchase order can be copied into a new purchase order which will save time.

WorkCenter navigation: Purchasing WorkCenter (PO) > Links Pagelet > Purchase Orders > Purchase Order Add/Update

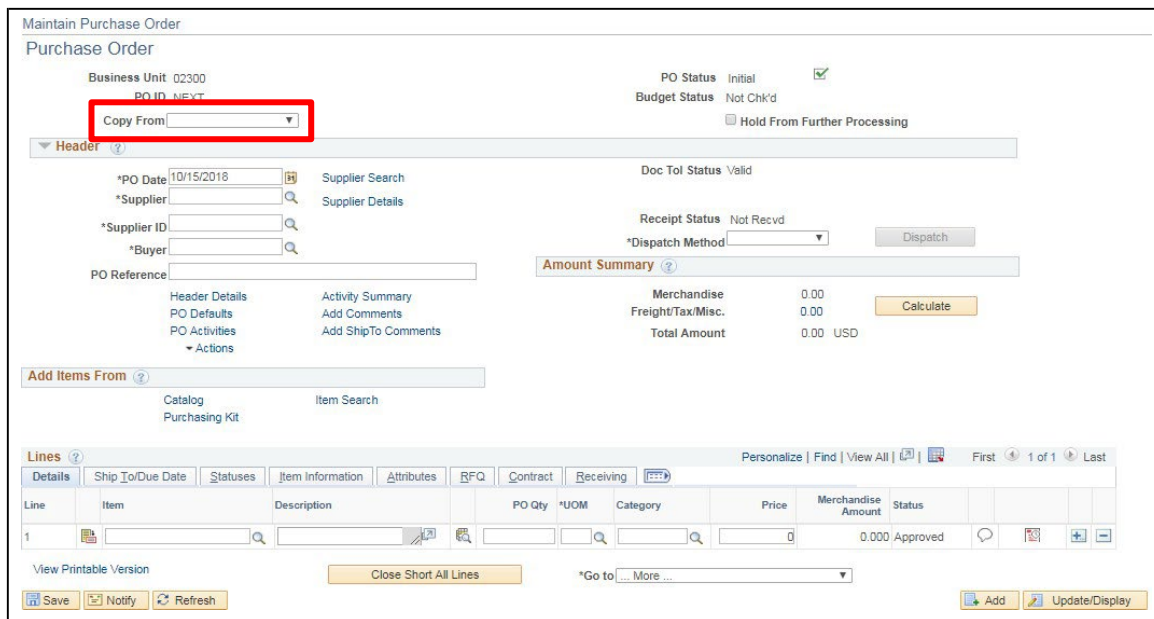
Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:



1. Click **Add**

The **Maintain Purchase Order** page displays:



2. Click on the drop-down arrow in the **Copy From** box and choose **Purchase Order**

The **Copy Purchase Order from Purchase Order** page displays:

PO Selection Criteria

PO ID: 0000004445 PO Date: [Date Picker]
 Supplier: [Search] Status: [Dropdown]
 Supplier ID: [Search] Origin: [Search]
 Buyer: [Search] Item ID: [Search]
 PO Reference: [Search] Category: [Search]

Search

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

| Select | PO ID | PO Date | PO Status | Supplier ID | Supplier |
|-------------------------------------|------------|------------|------------|-------------|----------------|
| <input checked="" type="checkbox"/> | 0000004445 | 08/30/2018 | Dispatched | 0000001293 | IRVING ENE-002 |

OK Cancel Refresh

3. Enter the **PO ID** you wish to copy from in the PO ID field or click the **Magnifying Glass** to select from a list of values

4. Click **Search**

The **PO Details** populate.

5. Click the **Select** box to the left of the **PO ID**

6. Click **OK**

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order
Purchase Order

Business Unit: 02300 PO ID: NEXT
 Copy From: [Dropdown]

PO Status: Open Budget Status: Not Chk'd
 Hold From Further Processing: ☐

Header ?

*PO Date: 10/15/2018 Supplier Search
 *Supplier: IRVING ENE-002 Supplier Details
 *Supplier ID: 0000001293 Irving Energy
 *Buyer: KSYMONDS Karen L Symonds
 PO Reference: [Search]

Doc Tol Status: Valid
 Receipt Status: Not Recvd
 *Dispatch Method: Print Dispatch

Amount Summary ?

| | |
|---------------------|-----------------|
| Merchandise | 8.60 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 8.60 USD |

Calculate

Add Items From ?

Catalog Purchasing Kit Item Search

Lines ?

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------|------------------|----------|------|----------|---------|--------------------|----------|
| 1 | 000000000000008661 | LIQUID PROPANE - | 860.0000 | GAL | 40506 | 0.01000 | 8.60 | Approved |

View Printable Version Close Short All Lines *Go to: More...

Save Notify Refresh Add Update/Display

All information from the purchase order that was copied has now populated the new PO fields. Adjustments can be made to the purchase order to reflect any changes needed. PO Date defaults in as current date.

Note: It is recommended that when the VISION Copy functionality is used all data entry fields in the new PO be reviewed for accuracy and appropriateness.

7. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Type & Origin will populate, Accounting Date should be current date.

8. Click **OK**

You are returned to the **Maintain Purchase Order** page:

9. Click **Save** once the PO has been reviewed

The following **Message** will open for each line of the PO:

10. Click **OK**

The PO has been saved and a PO ID number assigned:

The screenshot displays the 'Maintain Purchase Order' interface. At the top, the 'Purchase Order' header shows 'Business Unit: 00300' and 'PO ID: 0000004447' (highlighted with a green box). The 'PO Status' is 'Open' and 'Budget Status' is 'Not Chk'd'. Below this, the 'Header' section contains fields for 'PO Date' (10/15/2018), 'Supplier' (IRVING ENE-002), 'Supplier ID' (0000001293), and 'Buyer' (KSYMOMDS). The 'Amount Summary' section shows 'Merchandise' at 8.60, 'Freight/Tax/Misc.' at 0.00, and a 'Total Amount' of 8.60 USD. The 'Lines' section at the bottom shows a single line item for 'LIQUID PROPANE -' with a quantity of 860.0000 and a price of 0.01000.

Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

Copying an Existing Purchase Order is Complete

Copy a Purchase Order from a Contract using every Contract Line

Situations when this function is used: When making payments on contracts for services, products, and construction regardless of dollar amount in accordance with Bulletin 3.5 and VISION Procedure #3.

Note: *Purchase Orders must be approved, have a valid budget check, and be dispatched in order to be used in a Voucher.*

WorkCenter navigation: Purchasing WorkCenter > Links Pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:

The screenshot shows the 'Purchase Order' page with the 'Add a New Value' section. The 'Business Unit' is set to '01110' and the 'PO ID' is 'NEXT'. The 'Add' button is highlighted with a red box.

1. Click **Add**

The **Maintain Purchase Order** page displays:

The screenshot shows the 'Maintain Purchase Order' page. The 'Copy From' field is highlighted with a red box. The page includes various fields for PO details, a summary table, and a table for PO lines.

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-------------|--------|------|----------|-------|--------------------|----------|
| 1 | | | | | | 0 | 0.000 | Approved |

2. Click on the drop-down arrow in the **Copy From** field and select **Contract**

The **Copy Purchase Order from Contract** page displays:

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID STATE Supplier []
Contract ID 00000000000000000000000034576 Supplier ID []
☐ Allow Open Item Contract Only Master Contract []

[Search]

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

| Contracts | More Details | | | | | |
|----------------------------------|-----------------------|-------------------------------------|-------------------------|-------------|------------|-------------|
| <input checked="" type="radio"/> | <input type="radio"/> | <input type="button" value="Find"/> | | | | |
| Select | SetID | Contract | Description | Supplier ID | Begin Date | Expire Date |
| <input type="checkbox"/> | STATE | 00000000000000000000000034576 | Rubrik Back Up Solution | 0000294841 | 07/31/2017 | 08/15/2022 |

[OK] [Cancel] [Refresh]

3. Enter your Contract Selection Criteria (Contract ID or Supplier ID)
4. Click **Search**

The **Contract** information populates.

- Click the checkbox under **Select** on the left side of the page
- Click **OK** to have contract quantity and amount from the contract default into the purchase order or click **Cancel** to enter a line quantity and amount on the purchase order

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 12/13/2018

*Supplier PRESIDIONE-001

*Supplier ID 0000294841

*Buyer ETEST

Supplier Search

Supplier Details

Presidio Networked Solutions

Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method Print

PO Reference Rubrik Back Up Solution

Header Details

Activity Summary

PO Details Add Comments

PO Activities Add ShipTo Comments

▼ Actions

Amount Summary

Merchandise 0.02

Freight/Tax/Misc. 0.00

Total Amount 0.02 USD

Add Items From

Catalog

Item Search

Purchasing Kit

Lines

Personalize

Find

View All

First

1-2 of 2

Last

Details

Ship To/Due Date

Statuses











Item Information

Attributes

RFO

Contract

Receiving

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | | | |
|------|---|---|--------|------|----------|---------|--------------------|----------|---|---|---|
| 1 |  | <input type="text"/> Rubrik Back Up  | 1.0000 | EA | 20584 | 0.01000 | 0.01 | Approved |  |  |  |
| 2 |  | <input type="text"/> Rubrik Back up Service  | 1.0000 | EA | 00101 | 0.01000 | 0.01 | Approved |  |  |  |

View Printable Version

Close Short All Lines

*Go to ... More ...

Save

Notify

Refresh

Add

Update/Display

Supplier ID and line information defaulted in from the contract.

7. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Header Details

PO Details

Supplier: PRESIDIONE-001
 *PO Type: GEN
 *Billing Location: PFMMP01
 Origin: FM
 PO Date: 12/13/2018
 Budget Status: Not Chk'd
 Tax Exempt: ☐
 ID:
 Letter of Credit ID:
 Ship To:
☐ Use One Ship To

Currency

Currency Code: USD
 Exchange Rate Detail: [Exchange Rate Detail](#)
 Base Currency: USD
 Exchange Rate: 1.00000000
 Rate Date: 01/01/1900
 Rate Type: CRRNT

Process Control Option

☒ Dispatch
 Acknowledgements required for: Not required
 *Method: Print
 Accounting Date: 12/13/2018
 Template ID:
 Accounting Template: STANDARD

8. Enter the **PO Type** by clicking on the [Magnifying Glass](#)

9. Enter the **Origin** by clicking on the [Magnifying Glass](#)

10. Click **OK**

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit: 01110
 PO ID: NEXT
 Copy From:
 PO Status: Open
 Budget Status: Not Chk'd
 Hold From Further Processing: ☐
 Doc Tol Status: Valid

Header

*PO Date: 12/13/2018
 *Supplier: PRESIDIONE-001
 *Supplier ID: 0000294841
 *Buyer: ETEST
 PO Reference: Rubrik Back Up Solution
 Supplier Search
 Supplier Details
 Presidio Networked Solutions
 Ella Test
 Header Details
 Activity Summary
 PO Defaults
 Add Comments
 PO Activities
 Add Ship To Comments
 Actions

Amount Summary

| Merchandise | Freight/Tax/Misc. | Total Amount |
|-------------|-------------------|--------------|
| 0.02 | 0.00 | 0.02 USD |

Add Items From

Catalog
 Purchasing Kit

Lines

| Line | Item | Description | PO Qty | UOM | Category | Price | Merchandise Amount | Status |
|------|------|------------------------|--------|-----|----------|---------|--------------------|----------|
| 1 | | Rubrik Back Up | 1.0000 | EA | 20584 | 0.01000 | 0.01 | Approved |
| 2 | | Rubrik Back up Service | 1.0000 | SA | 00101 | 0.01000 | 0.01 | Approved |

Footer

View Printable Version
 Close Short All Lines
 *Go to: More ...

11. Adjust the PO Qty and Price fields as appropriate to your situation and in compliance with contract terms.

12. Click on the [Schedule](#) icon

The **Schedules** page displays:

Maintain Purchase Order
Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Open
PO ID 0000000957 PO Date 12/13/2018

Return to Main Page

Lines Find | View All First 1 of 2 Last

| Line | Item | Rubrik Back Up | PO Qty | Merchandise Amt |
|------|------|----------------|--------------|-----------------|
| 1 | | | 5000.0000 EA | 50.00 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 | 12/13/2018 | PFMMTP002 | 5000.0000 | 0.01000 | 50.00 | Active |

Add ShipTo Comments

Save Notify Refresh Add Update/Display

13. Update the **Due Date** field as necessary

14. Enter a **Ship To** location

15. Click on the **Chartfields/Distributions** icon

The following **Message** may appear:

Custom price on line 1, schedule 1. Override with system calculated price? (10200.66)

The schedule is marked as having a custom price. The system has calculated a different price than the custom price.

If you choose to not have the system override the custom price, you can see how the system calculated its price by viewing the Value Adjustments for the schedule. If at that time, you want to use the system's price, you can use the button on the value adjustments page to set the current price equal to the system-calculated price.

Yes No

16. Click **No** if you've already updated the PO Qty & Price

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1 Help

Unit 01110 Supplier PRESIDIONE-001
PO ID 0000000957 Item Rubrik Back Up
Line 1
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000
Merchandise Amount 50.00 USD
Doc. Base Amount 50.00 USD

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

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

| Dist | Status | Percent | PO Qty | Merchandise Amount | Currency | *GL Unit | *Account | Fund | Dept | Program | Class | Project |
|------|--------|----------|----------|--------------------|----------|----------|----------|-------|------------|---------|-------|---------|
| 1 | Open | 100.0000 | 5000.000 | 50.00 | USD | 01110 | 521600 | 10000 | 1110003000 | | | |

OK Cancel Refresh

17. In the Distribute by field **Quantity** defaults in. You can change this to **Amount** by clicking on the down arrow. If Quantity is selected, each distribution line is distributed by quantity. If Amount is selected each distribution line is distributed by amount

18. Enter Chartfield information

19. Click **OK**

Maintain Purchase Order

Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Open
 PO ID NEXT PO Date 12/13/2018

Return to Main Page

Lines Find View All First 1 of 2 Last

| Line | 1 | Item | Rubrik Back Up | PO Qty | 5.0000 EA | Merchandise Amt | 50.00 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 | 12/13/2018 | PFMMTP002 | 5.0000 | 10.00000 | 50.00 | Active | |

Add ShipTo Comments

Save Notify Refresh Add Update/Display

If there are more rows, click the **View All** link to see all schedules or click the **next arrow** to see only the next schedule for updating. Once you have updated all schedules and distributions

20. Click **Save**

The following **Message** may appear for each line of the PO:

Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

OK Cancel

21. Click **OK**

The PO has been saved and assigned a PO ID number:

Maintain Purchase Order

Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Open
PO ID 0000000957 PO Date 12/13/2018

Return to Main Page

Lines Find View All First 1 of 2 Last

| Line | 1 | Item | Rubrik Back Up | PO Qty | 5000.0000 EA | Merchandise Amt | 50.00 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 | 12/13/2018 | PFMMTP002 | 5000.0000 | 0.01000 | 50.00 | Active | |

Add ShipTo Comments

Save Notify Refresh Add Update/Display

22. Click on the **Return to Main Page** link

The **Maintain Purchase Order** page displays:

Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

Copying a Purchase Order from a Contract is Complete

Enter an Express Purchase Order

Situations when this function is used: The entry of an express purchase order is simplified and therefore faster to enter than a regular PO. It may be used if a vendor is requiring a purchase order before you can place an order.

Note: An Express Purchase Order cannot be used in a PO Voucher and does not draw down on a contract.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Express Purchase Orders

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update Express POs

The **Express Purchase Order** page displays:

The screenshot shows the 'Purchase Order' entry form. At the top left is the title 'Purchase Order'. Below it is a link 'Add a New Value'. On the right is a search button 'Find an Existing Value'. The main form area contains two input fields: '*Business Unit' with the value '02300' and '*PO ID' with the value 'NEXT'. Below these fields is a red-bordered 'Add' button.

1. **Business Unit** - Accept default or enter a valid Business Unit
2. **PO ID** - Leave as **NEXT**
3. Click **Add**

The **Express Purchase Order** page displays:

The screenshot shows the 'Express Purchase Order' details page. At the top is the title 'Express Purchase Order' and 'Purchase Order'. Below the title are fields for 'Business Unit' (02300), 'PO ID' (NEXT), and 'Copy From'. To the right are status fields: 'PO Status' (Open), 'Budget Status' (Not Chk'd), and a checkbox for 'Hold From Further Processing'. Below these is a 'Header' section with fields for '*PO Date' (10/12/2018), '*Supplier' (IRVING ENE-002), '*Supplier ID' (0000001293), and '*Buyer' (KSYMOMDS). To the right of these fields are links for 'Supplier Search', 'Supplier Details', 'Irving Energy', and 'Karen L Symonds'. Below the header is an 'Amount Summary' section with a table showing 'Merchandise' (0.00), 'Freight/Tax/Misc.' (0.00), and 'Total Amount' (0.00 USD). To the right of the table is a 'Calculate' button. Below the amount summary is an 'Add Items From' section with links for 'Catalog' and 'Item Search'. Below that is a 'Lines' table with columns: Line, Item, Description, PO Qty, *UOM, Category, Merchandise Amt, and Status. The table has one row with Line 1, Item, Description, PO Qty, *UOM, Category, Merchandise Amt (0.000), and Status (Approved). Below the table are links for 'Expand All', 'Collapse All', and 'View Printable Version'. At the bottom are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

4. **Supplier ID** - Enter the **Supplier ID** (be sure to include the leading zeros)
5. **Buyer** - Enter **Buyer ID**
6. Click **Refresh**
7. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Header Details

PO Details

Supplier IRVING ENE-002 PO Date 10/12/2018
 *PO Type PROD Budget Status Not Chk'd
 *Billing Location PDLCTMP Billing Address Tax Exempt
 ID
 Origin DLC Letter of Credit ID
☐ Use One Ship To Ship To

Currency

Currency Code USD Exchange Rate Detail Base Currency USD
 Rate Date 10/12/2018 Exchange Rate 1.00000000
 Rate Type CRRNT

Process Control Option

☒ Dispatch Acknowledgements required for Not required
 *Method Print Accounting Date 10/12/2018
 Template ID Accounting Template STANDARD

OK Cancel Refresh

8. Enter the **PO Type** by clicking on the [Magnifying Glass](#)

9. Enter the **Origin** by clicking on the [Magnifying Glass](#)

10. Click **OK**

The **Express Purchase Order** page displays:

Express Purchase Order

Purchase Order

Business Unit 02300 PO ID NEXT PO Status Open Budget Status Not Chk'd
 Copy From Hold From Further Processing

Header

*PO Date 10/12/2018 Supplier Search Doc Tot Status Valid
 *Supplier IRVING ENE-002 Supplier Details
 *Supplier ID 0000001293 Irving Energy
 *Buyer KSYMONDS Karen L Symonds
 PO Reference

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

Amount Summary

| | |
|-------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

Calculate

Add Items From

Catalog Item Search
 Purchasing Kit

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|----------|
| 1 | | | | | | 0.000 | Approved |

254 characters remaining

Expand All Collapse All
 View Printable Version

Go to ... More ...

Save Notify Refresh Add Update/Display

11. Click on the **Expand All** link

The **Schedule & Distribution** sections are expanded so that you can see them along with the PO Line information:

The screenshot displays the 'Express Purchase Order' form. The 'Purchase Order' header section includes fields for Business Unit (02300), PO ID (NEXT), PO Status (Open), Budget Status (Not Chk'd), and a 'Hold From Further Processing' checkbox. The 'Header' section contains fields for PO Date (10/12/2018), Supplier (IRVING ENE-002), Supplier ID (0000001293), Buyer (KSYMOMDS), and PO Reference. The 'Amount Summary' section shows Merchandise (8.60), Freight/Tax/Misc. (0.00), and Total Amount (8.60 USD). The 'Lines' section is highlighted with a red box and contains a table with columns: Line, Item, Description, PO Qty, *UOM, Category, Merchandise Amt, and Status. The first line is highlighted with a green box and contains the following data: Line 1, Item 000000000000008661, Description LIQUID PROPANE - GAS, PO Qty 860.0000, *UOM GAL, Category 40506, Merchandise Amt 8.60, and Status Approved. The 'Schedules' section is also highlighted with a green box and contains a table with columns: Sched, *Due Date, *Ship To, *PO Qty, Price, Merchandise Amt, Status, and *Distribute by. The first schedule is highlighted with a green box and contains the following data: Sched 1, *Due Date 11/11/2018, *Ship To, *PO Qty 860.0000, Price 0.01000, Merchandise Amt 8.60, Status Active, and *Distribute by Quantity. The 'Distributions' section is also highlighted with a green box and contains a table with columns: Dist, Status, Percent, PO Qty, Merchandise Amt, Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. The first distribution is highlighted with a green box and contains the following data: Dist 1, Status Open, Percent 100.0000, PO Qty 860.0000, Merchandise Amt 8.60, Curr USD, *GL Unit 02300, *Account 521200, Fund, Dept, Program, and Class. The 'Refresh' button is highlighted with a red box at the bottom of the form.

12. Enter the **PO Line** information (Item# - if applicable, Description, PO Qty, UOM, and Category)

13. Click **Refresh**

The **Due Date** defaults in as 30 days from the current date. **Account** number defaults in based on Category.

14. Enter the **Ship To** location and **Price**, **Distribute By** defaults to **Quantity** you can change this to **Amount** by clicking on the down arrow. If Quantity is selected, each distribution line is distributed by quantity. If Amount is selected each distribution line is distributed by amount.

15. Click **Refresh**

Amount populates in both the lines and schedule page:

The screenshot shows the 'Express Purchase Order' form. The 'Amount Summary' section displays the following values:

| Category | Amount | Unit |
|---------------------|-------------|------------|
| Merchandise | 8.60 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 8.60 | USD |

The 'Lines' section shows a single line item for 'LIQUID PROPANE - GAS' with a quantity of 860.0000 and a unit of GAL. The 'Schedules' section shows a single schedule with a due date of 11/11/2018 and a quantity of 860.0000. The 'Distributions' section shows a single distribution with a status of Open and a percent of 100.0000. The 'Chartfields' section is highlighted with a red box, showing the following values:

| Chartfield | Value |
|------------|--------|
| *Account | 521200 |
| Fund | |
| Dept | |
| Program | |
| Class | |

The 'Save' button is highlighted with a red box at the bottom left of the form.

16. Enter all appropriate **Chartfield** information

17. Click **Save**

The PO has been saved and assigned a PO ID number:

The screenshot shows the 'Express Purchase Order' form after saving. The 'PO ID' field is highlighted with a green box and contains the value '0000004446'. The 'Business Unit' is '02300' and the 'PO Status' is 'Open'.

Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

Entering an Express Purchase Order is Complete

Create a Change Order for a PO

Situations when this function is used: To make any changes to the line information on a purchase order.

Note: *If the PO is not in a Dispatched status the change order icon will not be available. It is recommended that the line, schedule, and distribution pages always be reviewed after making any changes to a PO.*

WorkCenter Navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Purchase Order' page with the 'Find an Existing Value' section. The 'Search Criteria' section is expanded, showing various search fields. The 'Search' button is highlighted with a red box. The 'Recent Searches' and 'Saved Searches' sections are also visible.

Purchase Order

Find an Existing Value ⊕ Add a New Value

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

🕒 Recent Searches Choose from recent searches ✎ 🔖 Saved Searches Choose from saved searches ✎

*Business Unit = 01110 🔍
PO ID begins with 0000000925
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 ☐
[^ Show fewer options](#)
☐ Case Sensitive
Search Clear

1. **Business Unit** - Accept default or enter a valid BU
2. **PO ID** - Enter the PO ID # - be sure to include the leading zero's
3. Click **Search**

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit: 01110
PO ID: 0000000925
Copy From: [Dropdown]

PO Status: Dispatched
Budget Status: Valid
Hold From Further Processing: [Checkbox]

Header

*PO Date: 04/27/2018
Supplier Search: [Text]
Doc To: Status: Valid
Backorder Status: Not Backordered
Create BackOrder: [Button]
Receipt Status: Not Recvd
*Dispatch Method: Print
Dispatch: [Button]

*Supplier: WBMASONCOI-001
Supplier Details: [Text]
*Supplier ID: 0000293240
W.B. Mason Co., Inc.
lin Ann Touchette

PO Reference: Office Supplies
Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Add Comments
Add Ship To Comments
Document Status

Amount Summary

| | |
|---------------------|-----------|
| Merchandise | 27.40 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 27.40 USD |
| Encumbrance Balance | 0.00 USD |

Calculate: [Button]

Add Items From

Catalog
Item Search

Select Lines To Display

Search for Lines: [Text] To: [Text] Retrieve: [Button]

Lines

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | Due Date | Ship To | Price | Status | Backorder Status |
|------|------|-----------------|--------|------|----------|----------|--------------------|----------|------------|-----------|----------|----------|------------------|
| 1 | | OFFICE SUPPLIES | 1.0000 | EA | 61599 | 27.40000 | 27.40 | Approved | 04/27/2018 | PFMMTP001 | 27.40000 | Approved | Not Backordered |

View Printable Version
Close Short All Lines
*Go to: [More...]

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

- Click on the **Change Order** icon. This will allow changes to be made on all PO lines.

Note: When you use the **Expand** icon in the Lines section of the page, you will see more change order icons. These icon(s) can be used in place of the one at the top of the Maintain Purchase Order page. Using the one under Lines will only allow you to adjust Line 1 of a PO. If the PO has several lines this would have to be done for each line.

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | Due Date | Ship To | Price | Status | Backorder Status |
|------|------|-----------------|--------|------|----------|----------|--------------------|----------|------------|-----------|----------|----------|------------------|
| 1 | | OFFICE SUPPLIES | 1.0000 | EA | 61599 | 27.40000 | 27.40 | Approved | 04/27/2018 | PFMMTP001 | 27.40000 | Approved | Not Backordered |

View Printable Version
Close Short All Lines
*Go to: [More...]

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

- Make the necessary changes

- Click **Refresh**

Maintain Purchase Order

Purchase Order

Business Unit: 01110
PO ID: 0000000925
Copy From: [Dropdown]

PO Status: Dispatched
Budget Status: Valid
Hold From Further Processing: [Checkbox]

Header

*PO Date: 04/27/2018
Supplier Search: [Text]
Doc To: Status: Valid
Backorder Status: Not Backordered
Create BackOrder: [Button]
Receipt Status: Not Recvd
*Dispatch Method: Print
Dispatch: [Button]

*Supplier: WBMASONCOI-001
Supplier Details: [Text]
*Supplier ID: 0000293240
W.B. Mason Co., Inc.
Caitlin Ann Touchette

PO Reference: Office Supplies
Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Add Comments
Add Ship To Comments
Document Status

Amount Summary

| | |
|---------------------|-----------|
| Merchandise | 27.40 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 27.40 USD |
| Encumbrance Balance | 0.00 USD |

Calculate: [Button]

- Click on the **Add Comments** link

The **PO Header Comments** page displays:

8. Enter comments referencing which change order number it was, what was changed, the date the change was made, and who completed the change order

9. Click **OK**

You are returned to the **Maintain Purchase Order** page:

10. Click on the **Header Details** link

11. Change the **Accounting Date** field to the current date

12. Click **OK**

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000925
Copy From [Dropdown]
PO Status Dispatched
Budget Status Valid
Hold From Further Processing [Checkbox]

Header

*PO Date 04/27/2018
*Supplier WBMASONCOI-001
*Supplier ID 0000283240
*Buyer CTOUCHET
PO Reference Office Supplies

Supplier Search
Supplier Details
W.B. Mason Co., Inc.
Caitlin Ann Touchette

Doc Tot Status Valid
Backorder Status Not Backordered
Receipt Status Not Recvd
*Dispatch Method Print

Create BackOrder
Dispatch

Amount Summary

| | |
|---------------------|-----------|
| Merchandise | 27.40 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 27.40 USD |
| Encumbrance Balance | 0.00 USD |

Calculate

Add Items From
Catalog Item Search

Select Lines To Display
Search for Lines Line To Retrieve

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-----------------|--------|------|----------|----------|--------------------|----------|
| 1 | | OFFICE SUPPLIES | 1.0000 | EA | 61599 | 27.40000 | 27.40 | Approved |

View Printable Version
Close Short All Lines
*Go to ... More ...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

13. Click **Save** once all changes have been completed

The following **Message** may open: –

Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

OK Cancel

14. Click **OK**

The **Schedules** page will display with applicable changes to the PO:

Maintain Purchase Order

Schedules

Unit 01110
PO ID 0000000925
Supplier WBMASONCOI-001
PO Date 04/27/2018
PO Status Open
Change Order 1

Return to Main Page

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-----------------|--------|------|----------|----------|--------------------|----------|
| 1 | | OFFICE SUPPLIES | 1.0000 | EA | 61599 | 27.40000 | 27.40 | Approved |

Schedules

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |
|-------|------------|----------|---------|----------|--------------------|--------|
| 1 | 04/27/2018 | PFMMP001 | 1.0000 | 30.00000 | 30.00 | Active |

Add ShipTo Comments

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

15. Click on the **Return to Main Page** link

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000925
Change Order 1
Copy From

PO Status Open
Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 04/27/2018
*Supplier WBMASONCOI-001
*Supplier ID 0000283240
*Buyer CTOUCHET

Supplier Search
Supplier Details
W.B. Mason Co., Inc.
Caitlin Ann Touchette

Doc Tot Status Valid

Receipt Status Not Recvd
*Dispatch Method Print
Dispatch

Amount Summary

| | |
|---------------------|-----------|
| Merchandise | 30.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 30.00 USD |
| Encumbrance Balance | 0.00 USD |

Calculate

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-----------------|--------|------|----------|----------|--------------------|----------|
| 1 | | OFFICE SUPPLIES | 1.0000 | EA | 61599 | 30.00000 | 30.00 | Approved |

View Printable Version
Close Short All Lines
*Go to ... More ...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

The **Change Order** field is now 1, the **PO Status** changed to Open, and the **Budget Status** is Not Chk'd.

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

Creating a Change Order to a PO Line is Complete

Create a Change to a PO - Schedule

Situations when this function is used: To make any changes to the Purchase Order Schedule area.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Purchase Order' page with the 'Find an Existing Value' section. The search criteria include fields for Business Unit (01110), PO ID (000000921), Purchase Order Date, PO Status, Short Supplier Name, Supplier ID, Supplier Name, Buyer, Buyer Name, PO Type, and Purchase Order Reference. A red box highlights the 'Search' button at the bottom of the search criteria section.

1. **Business Unit** - Accept default or enter a valid BU
2. **PO ID** - Enter a PO ID number
3. Click **Search**

The **Maintain Purchase Order** page displays:

The screenshot shows the 'Maintain Purchase Order' page. The header section displays PO details: Business Unit 01110, PO ID 000000921, PO Status Dispatched, Budget Status Valid, and Hold From Further Processing. The lines section shows a table with columns: Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, Status, and Actions. The first line item is 'OFFICE SUPPLIES' with a quantity of 1.0000 EA and a price of 13.85000. The 'Schedule' icon in the Actions column for this line item is highlighted with a red box.

4. Click on the **Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

Schedules

Unit 01110 Supplier WBMASONCOI-001 PO Status Dispatched
PO ID 0000000921 PO Date 03/28/2018

[Return to Main Page](#)

| Line | Item | OFFICE SUPPLIES | PO Qty | 1.0000 EA | Merchandise Amt | 13.85 USD |
|--|------------|-----------------|---------|-----------|--------------------|-----------|
| Schedules Personalize Find View All First 1 of 1 Last | | | | | | |
| Details Statuses Shipment Matching Receiving Freight RTV PDF | | | | | | |
| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |
| 1 | 03/28/2018 | PFMMTP001 | 1.0000 | 13.85000 | 13.85 | Active |

[Add Ship To Comments](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

5. Click on the **Schedule Details** icon

The **Details for Schedule 1** page displays:

Details for Schedule 1 [Help](#)

Unit 01110 Supplier WBMASONCOI-001
PO ID 0000000921 Item OFFICE SUPPLIES
Line 1
Schedule 1 Status Active

Schedule Details

Due Date 03/28/2018 ☐ Custom Price - No Override
Time Due ☐ Zero Price Indicator No Charge
Ship To PFMMTP001

Original Promise Date 03/28/2018
Ship Date
Ship Via
Freight Terms FOBDEST Destination
Attention To
Distribute By Quantity

Amount Summary

| | |
|------------------|-----------|
| Schedule Qty | 1.0000 |
| Merchandise Amt | 13.85 USD |
| Doc. Base Amount | 13.85 USD |

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

[Matching Controls](#)
[Receiving Controls](#)
[Freight Calculation Rule](#)
[Return To Vendor / Supplier](#)

[OK](#) [Cancel](#) [Refresh](#)

6. Click on the **Create Schedule Change** icon

Data fields are now open, you can make the needed changes – in this example the Ship To location will be changed:

Maintain Purchase Order

Schedules

Unit 01110 Supplier WBMASONCOI-001 PO Status Dispatched
PO ID 0000000921 PO Date 03/28/2018

Return to Main Page

| Line | Item | OFFICE SUPPLIES | PO Qty | 1.0000 EA | Merchandise Amt | 13.85 USD | | | | | | | | | | | | | | |
|---|------------|-----------------|---------|-----------|--------------------|-----------|-------|-----------|----------|---------|-------|--------------------|--------|---|------------|-----------|--------|----------|-------|--------|
| <p>Schedules</p> <p>Details Statuses Shipment Matching Receiving Freight RTV PFMT</p> <p>Personalize Find View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Due Date</th> <th>*Ship To</th> <th>*PO Qty</th> <th>Price</th> <th>Merchandise Amount</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>03/28/2018</td> <td>PFMMTP001</td> <td>1.0000</td> <td>13.85000</td> <td>13.85</td> <td>Active</td> </tr> </tbody> </table> | | | | | | | Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status | 1 | 03/28/2018 | PFMMTP001 | 1.0000 | 13.85000 | 13.85 | Active |
| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status | | | | | | | | | | | | | | |
| 1 | 03/28/2018 | PFMMTP001 | 1.0000 | 13.85000 | 13.85 | Active | | | | | | | | | | | | | | |

Add ShipTo Comments

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

7. Change the **Ship To** location

8. Click **Save**

The **PO Status** has changed to **Open** and the **Change Order** is now 1:

Maintain Purchase Order

Schedules

Unit 01110 Supplier WBMASONCOI-001 PO Status Open
PO ID 0000000921 PO Date 03/28/2018

Change Order 1

Return to Main Page

| Line | Item | OFFICE SUPPLIES | PO Qty | 1.0000 EA | Merchandise Amt | 13.85 USD | | | | | | | | | | | | | | |
|---|------------|-----------------|---------|-----------|--------------------|-----------|-------|-----------|----------|---------|-------|--------------------|--------|---|------------|-----------|--------|----------|-------|--------|
| <p>Schedules</p> <p>Details Statuses Shipment Matching Receiving Freight RTV PFMT</p> <p>Personalize Find View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Due Date</th> <th>*Ship To</th> <th>*PO Qty</th> <th>Price</th> <th>Merchandise Amount</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>03/28/2018</td> <td>PFMMTP002</td> <td>1.0000</td> <td>13.85000</td> <td>13.85</td> <td>Active</td> </tr> </tbody> </table> | | | | | | | Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status | 1 | 03/28/2018 | PFMMTP002 | 1.0000 | 13.85000 | 13.85 | Active |
| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status | | | | | | | | | | | | | | |
| 1 | 03/28/2018 | PFMMTP002 | 1.0000 | 13.85000 | 13.85 | Active | | | | | | | | | | | | | | |

Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display

9. Click on the **Return to Main Page** link

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO Status Open
PO ID 0000000921 Budget Status Valid
Change Order 1

Copy From [] Hold From Further Processing

Header

*PO Date 03/28/2018 Supplier Search Doc Tol Status Valid
*Supplier WBMASONCOI-001 Supplier Details Backorder Status Not Backordered Create BackOrder
*Supplier ID 0000283240 W.B. Mason Co., Inc. Receipt Status Not Recvd
*Supplier TC Caitlin Ann Touchette *Dispatch Method Print Dispatch

PO Reference Office Supplies

Amount Summary

| Header Details | Amount | Unit |
|----------------|---------------------|-----------|
| PO Defaults | Merchandise | 13.85 |
| PO Activities | Freight/Tax/Misc. | 0.00 |
| Requisitions | Total Amount | 13.85 USD |
| *Actions | Encumbrance Balance | 0.00 USD |

Add Items From [] Select Lines To Display []

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|-----------------|-------------|--------|------|----------|----------|--------------------|----------|
| 1 | OFFICE SUPPLIES | | 1.0000 | EA | 61599 | 13.85000 | 13.85 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

10. Click on the **Add Comments** link

The **PO Header Comments** page displays:

11. Click the **+** icon if you need to add a Comment
12. Enter information about the change (i.e. change order #, what was changed, date of the change, and who completed the change)
13. Click **OK**

The **Maintain Purchase Order** page displays:

14. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Header Details

PO Details

Supplier: WBMASONCOI-001 PO Date: 03/28/2018
 *PO Type: PROD Budget Status: Valid
 *Billing Location: PFMMTP001 Billing Address: ID:
 Origin: FM Letter of Credit ID:
☐ Use One Ship To Ship To: PFMMTP002

Currency

Currency Code: USD Exchange Rate Detail: Base Currency: USD
 Rate Date: 01/01/1900 Exchange Rate: 1.00000000
 Rate Type: CRRNT

Process Control Option

☒ Dispatch Acknowledgements required for: Not required
 *Method: Print Accounting Date: 11/09/2018
 Template ID: Accounting Template: STANDARD

15. Update the **Accounting Date** to the current date

16. Click **OK**

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit: 01110 PO ID: 0000000921
 Change Order: 1 Copy From:
 PO Status: Open Budget Status: Not Chk'd
☐ Hold From Further Processing

Header

*PO Date: 03/28/2018 Supplier Search: Doc Tot Status: Valid
 *Supplier: WBMASONCOI-001 Backorder Status: Not Backordered Create BackOrder
 *Supplier ID: 0000283240 Supplier Details: Receipt Status: Not Recvd
 *Buyer: CTOUCHET W.B. Mason Co., Inc. *Dispatch Method: Print Dispatch
 Caitlin Ann Touchette
 PO Reference:
 Header Details Activity Summary
 PO Defaults Edit Comments
 PO Activities Add ShipTo Comments
 Requisitions Document Status
 Actions

Amount Summary

| | | |
|---------------------|-------|-----|
| Merchandise | 13.85 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 13.85 | USD |
| Encumbrance Balance | 0.00 | USD |

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-----------------|--------|------|----------|----------|--------------------|----------|
| 1 | | OFFICE SUPPLIES | 1.0000 | EA | 61599 | 13.85000 | 13.85 | Approved |

View Printable Version Close Short All Lines *Go to More ...

17. Click **Save**

It is important that you follow specific controls in place in your department for approval and budget checking.

Once the PO has been approved, the page **must** be saved. The Dispatch button remains grayed out until the page has been saved, the PO must have a status of Dispatched to be used in a voucher.

The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

Creating a Change Order to a PO Schedule is Complete

Create a Change to a PO - Distribution

Situations when this function is used: The Chartfield information on the PO is incorrect needs to be corrected.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Purchase Order' page with the 'Find an Existing Value' section. The 'Search Criteria' dropdown is expanded, showing a list of search fields. The 'Search' button is highlighted with a red box.

Purchase Order

Find an Existing Value ➕ Add a New Value

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

Recent Searches Choose from recent searches ✎ 🔖 Saved Searches Choose from saved searches ✎

*Business Unit ▼ 01110 🔍
PO ID begins with ▼ 0000000957 🔍
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 ☐
⬆ Show fewer options
☐ Case Sensitive
Search Clear

1. **Business Unit** - Accept default or enter a valid BU
2. **PO ID** - Enter a PO ID number
3. Click **Search**

The **Maintain Purchase Order** page displays:

The screenshot shows the 'Maintain Purchase Order' page. The 'Schedule' icon in the 'Lines' table is highlighted with a red box.

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000957
Copy From ▼

PO Status Approved ✖
Budget Status Valid
☐ Hold From Further Processing

▼ **Header** ?

*PO Date 12/13/2018 📅 Supplier Search
*Supplier PRESIDIONE-001 🔍 Supplier Details
*Supplier ID 0000294841 🔍 Presidio Networked Solutions
*Buyer ETEST 🔍 Elia Test

PO Reference Rubrik Back Up Solution

Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Add Comments
Add ShipTo Comments
Document Status

Doc Tot Status Valid

Receipt Status Not Recvd
*Dispatch Method Print 🔍 Dispatch

Amount Summary ?

| | | |
|---------------------|--------|-----|
| Merchandise | 100.00 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 100.00 | USD |
| Encumbrance Balance | 100.00 | USD |

Calculate

Add Items From ? Catalog Item Search

Select Lines To Display ?
Search for Lines Line 🔍 To 🔍 Retrieve

Lines ?

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | |
|------|------|------------------------|-----------|------|----------|---------|--------------------|----------|--|
| 1 | | Rubrik Back Up | 5000.0000 | EA | 20584 | 0.01000 | 50.00 | Approved | 🔍 🗨 📅 ⬅ ➡ |
| 2 | | Rubrik Back up Service | 5000.0000 | EA | 00101 | 0.01000 | 50.00 | Approved | 🔍 🗨 📅 ⬅ ➡ |

View Printable Version Close Short All Lines *Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

4. Click on the **Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Approved
PO ID 0000000957 PO Date 12/13/2018

[Return to Main Page](#)

Lines Find | View All First 1 of 2 Last

| Line | 1 | Item | Rubrik Back Up | PO Qty | 5000.0000 | EA | Merchandise Amt | 50.00 | USD |
|------|---|------|----------------|--------|-----------|----|-----------------|-------|-----|
|------|---|------|----------------|--------|-----------|----|-----------------|-------|-----|

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

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

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |
|-------|------------|-----------|-----------|---------|--------------------|--------|
| 1 | 12/13/2018 | PFMMTP002 | 5000.0000 | 0.01000 | 50.00 | Active |

Add ShipTo Comments

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

5. Click on the **Chartfield/Distributions** icon

The **Distribution for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001 Rubrik Back Up
PO ID 0000000957 Item
Line 1
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000
Merchandise Amount 50.00 USD
Doc. Base Amount 50.00 USD

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

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

| Dist | Status | Percent | PO Qty | Merchandise Amount | Currency | *GL Unit | *Account | Fund | Dept | Program | Class | Project |
|------|--------|----------|----------|--------------------|----------|----------|----------|-------|------------|---------|-------|---------|
| 1 | Open | 100.0000 | 5000.000 | 50.00 | USD | 01110 | 521600 | 10000 | 1110003000 | | | |

[OK](#) [Cancel](#) [Refresh](#)

6. Click the **+** icon on the far right of the distribution to add additional rows

The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

[OK](#) [Cancel](#)

7. Enter the number of rows you wish to add

8. Click **OK**

A new line is added:

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001
PO ID 0000000957 Item Rubrik Back Up
Line 1
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000
Merchandise Amount 50.00 USD
Doc. Base Amount 50.00 USD

Distribution

Chartfields Details/Tax Asset Information Req Detail **Statuses** Budget Information

| Dist | Status | Percent | *Account | Fund | Dept | Program | Class | Project | Affiliate |
|------|--------|----------|----------|-------|------------|---------|-------|---------|-----------|
| 1 | Open | 100.0000 | 521600 | 10000 | 1110003000 | | | | |
| 2 | Open | | | | | | | | |

OK Cancel Refresh

9. Enter the correct Chartfield information in the new distribution line

10. Click on the **Statuses** tab

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001
PO ID 0000000957 Item Rubrik Back Up
Line 1
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000
Merchandise Amount 50.00 USD
Doc. Base Amount 50.00 USD

Distribution

Chartfields Details/Tax Asset Information Req Detail **Statuses** Budget Information

| Dist | Status | Percent | Chartfield Status | Peg Status |
|------|--------|----------|-------------------|------------|
| 1 | Open | 100.0000 | Valid | Not Pegged |
| 2 | Open | | Valid | Not Pegged |

OK Cancel Refresh

11. Click the Red X to cancel the original distribution line

The **Status** for Line 1 changes from Open to **Cancelled**:

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001
PO ID 0000000957 Item Rubrik Back Up
Line 1
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000
Merchandise Amount 50.00 USD
Doc. Base Amount 50.00 USD

Distribution

Chartfields Details/Tax Asset Information Req Detail **Statuses** Budget Information

| Dist | Status | Percent | Chartfield Status | Peg Status |
|------|----------|----------|-------------------|------------|
| 1 | Canceled | 100.0000 | Valid | Not Pegged |
| 2 | Open | 100.00 | Valid | Not Pegged |

OK Cancel Refresh

12. Click **OK**

The **Schedules** page displays:

Maintain Purchase Order

Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Approved
PO ID 0000000957 PO Date 12/13/2018

[Return to Main Page](#)

Lines Find | View All First 1 of 2 Last

| Line | 1 | Item | Rubrik Back Up | PO Qty | 5000.0000 | EA | Merchandise Amt | 50.00 | USD |
|------|---|------|----------------|--------|-----------|----|-----------------|-------|-----|
|------|---|------|----------------|--------|-----------|----|-----------------|-------|-----|

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

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |
|-------|------------|-----------|-----------|---------|--------------------|--------|
| 1 | 12/13/2018 | PFMMTP002 | 5000.0000 | 0.01000 | 50.00 | Active |

Add ShipTo Comments

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

13. Click on the **Distributions/Chartfields** icon

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001
PO ID 0000000957 Item Rubrik Back Up
Line 1
Schedule 1 Status Active

*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000
Merchandise Amount 50.00 USD
Doc. Base Amount 50.00 USD

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

| Dist | Status | Percent | PO Qty | Merchandise Amount | Currency | *GL Unit | *Account | Fund | Dept | Program | Class | Project |
|------|----------|----------|-----------|--------------------|----------|----------|----------|-------|------------|---------|-------|---------|
| 1 | Canceled | 100.0000 | 5000.0000 | 50.00 | USD | 01110 | 521600 | 10000 | 1110003000 | | | |
| 2 | Open | 100.0000 | 5000.0000 | 50.00 | USD | 01110 | 522300 | 10000 | 1110003000 | | | |

[OK](#) [Cancel](#) [Refresh](#)

14. If you haven't already, enter the percentage in the new distribution line, once you tab out of the field the amount will default in

15. Click **OK**

The **Schedules** page displays:

Maintain Purchase Order

Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Approved
PO ID 0000000957 PO Date 12/13/2018

[Return to Main Page](#)

16. Click on the **Return to Main Page** link

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000957

Copy From []

PO Status Approved
Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 12/13/2018
*Supplier PRESIDIONE-001
*Supplier ID 0000294841
*Buyer ETEST

Supplier Search
Supplier Details
Presidio Networked Solutions
Ella Test

PO Reference Rubrik Back Up Solution

Header Details (highlighted)
PO Details
PO Activities
Requisitions
Actions

Activity Summary
Add Comments
Add Ship To Comments
Document Status

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Print

Amount Summary

| | | |
|---------------------|--------|-----|
| Merchandise | 100.00 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 100.00 | USD |
| Encumbrance Balance | 100.00 | USD |

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line [] To [] Retrieve

Lines

| Line | Item | Description | PO Qty | UOM | Category | Price | Merchandise Amount | Status |
|------|------|------------------------|-----------|-----|----------|---------|--------------------|----------|
| 1 | | Rubrik Back Up | 5000.0000 | EA | 20584 | 0.01000 | 50.00 | Approved |
| 2 | | Rubrik Back up Service | 5000.0000 | EA | 00101 | 0.01000 | 50.00 | Approved |

View Printable Version
Close Short All Lines
*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

17. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Header Details

PO Details

Supplier PRESIDIONE-001
*PO Type GEN
*Billing Location PFMMTP001
Origin FM
*Use One Ship To

PO Date 12/13/2018
Budget Status Not Chk'd
Tax Exempt
ID
Letter of Credit ID
Ship To PFMMTP002

Currency

Currency Code USD
Rate Date 01/01/1900
Rate Type CRRNT

Base Currency USD
Exchange Rate 1.00000000

Process Control Option

☒ Dispatch
*Method Print
Template ID

Acknowledgements required for Not required
Accounting Date 12/13/2018 (highlighted)
Accounting Template STANDARD

OK (highlighted) Cancel Refresh

18. Change the accounting date to the current date if it isn't already

19. Click **OK**

You are brought back to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000957

Copy From []

PO Status Approved
Budget Status Not Chk'd

Doc Tol Status Valid

Receipt Status Not Recvd
Dispatch Method Print

Amount Summary

| | |
|---------------------|------------|
| Merchandise | 100.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 100.00 USD |
| Encumbrance Balance | 100.00 USD |

Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Add Comments
Add Ship To Comments
Document Status

Add Items From []

Select Lines To Display []

Search for Lines Line [] To [] Retrieve

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|------------------------|-----------|------|----------|---------|--------------------|----------|
| 1 | | Rubrik Back Up | 5000.0000 | EA | 20584 | 0.01000 | 50.00 | Approved |
| 2 | | Rubrik Back up Service | 5000.0000 | EA | 00101 | 0.01000 | 50.00 | Approved |

View Printable Version

Close Short All Lines

*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

20. Click on the **Add Comments** link

The **PO Header Comments** page displays:

PO Header Comments

Business Unit 01110
PO ID 0000000957
Supplier PRESIDIONE-001

☒ Retrieve Active Comments Only

*Sort Method Comment Time Stamp

*Sort Sequence Ascending

Comments

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

Use Standard Comments

Comment Status Active

Inactivate

Needed to change chartfield account information on distribution line two - 12/13/18 (ET)

☐ Send to Supplier
☐ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> PO 01110-0000000957

OK Cancel Refresh

21. Enter information about the change (i.e. change order number, what was changed, date of the change, and who completed the change.) If you need additional space, click the **+** icon and enter the information

22. Click **OK**

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000957

Copy From

PO Status: Approved
Budget Status: Not Chk'd

☐ Hold From Further Processing

Header

*PO Date 12/13/2018
*Supplier PRESIDIONE-001
*Supplier ID 0000294841
*Buyer ETEST

Supplier Search
Supplier Details
Presidio Networked Solutions
Ella Test

PO Reference Rubrik Back Up Solution

Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Edit Comments
Add ShipTo Comments
Document Status

Doc Tot Status Valid

Receipt Status Not Recvd
*Dispatch Method Print

Amount Summary

| | |
|---------------------|------------|
| Merchandise | 100.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 100.00 USD |
| Encumbrance Balance | 100.00 USD |

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|------------------------|-----------|------|----------|---------|--------------------|----------|
| 1 | | Rubrik Back Up | 5000.0000 | EA | 20584 | 0.01000 | 50.00 | Approved |
| 2 | | Rubrik Back up Service | 5000.0000 | EA | 00101 | 0.01000 | 50.00 | Approved |

View Printable Version

Close Short All Lines

*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

23. Click **Save**

PO Budget Status has changed to **Not Chk'd**.

It is important that you follow specific controls in place in your department for budget checking.

Creating a Change Order to a PO Distribution is Complete

Print a Dispatched Purchase Order

Situations when this function is used: When you need to reprint a previously dispatched purchase order.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** button:

Purchase Order

Find an Existing Value + Add a New Value

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

Recent Searches: Choose from recent searches ✎ | Saved Searches: Choose from saved searches ✎

*Business Unit: [02300] 🔍

PO ID: [begins with 0000004534] 🔍

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: ☐

[Show fewer options](#)

☐ Case Sensitive

Search Clear

1. **Business Unit** - Accept default or enter a valid BU
2. **PO Status** - Set to = **Dispatched**
3. Click **Search**
4. Select PO to print

The **Maintain Purchase Order** page displays, PO Status = Dispatched:

Maintain Purchase Order

Purchase Order

Business Unit: 02300
PO ID: 0000004534
Copy From: ▼

PO Status: Dispatched ⚠ ✖
Budget Status: Valid

☐ Hold From Further Processing

▼ **Header** ?

*PO Date: 12/04/2018
*Supplier: IRVING ENE-002
*Supplier ID: 0000001293
*Buyer: ETEST
PO Reference: Fuel Products

Supplier Search
Supplier Details
Irving Energy
Ella Test

Doc Tol Status Valid
Backorder Status: Not Backordered
Receipt Status: Not Recvd
*Dispatch Method: Print Dispatch

Amount Summary ?

| | | |
|---------------------|--------|-----|
| Merchandise | 125.00 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 125.00 | USD |
| Encumbrance Balance | 125.00 | USD |

Calculate

Add Items From ?

Catalog
Purchasing Kit

Select Lines To Display ?

Search for Lines: Line 🔍 To 🔍 Retrieve

Lines ?

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

| Line | Item | Description | PO Qty | *UOM | Category | Price | Merchandise Amount | Status |
|------|---------------------|----------------------|---------|------|----------|---------|--------------------|----------|
| 1 | 0000000000000008661 | LIQUID PROPANE - GAS | 50.0000 | GAL | 40506 | 2.50000 | 125.00 | Approved |

View Printable Version Close Short All Lines *Go to ... More ...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

5. Click on the **View Printable Version** link

The following **Message** opens:

Message

Do you want to print the purchase order with distribution details Yes / No. (10250,337)

6. Click **Yes**

Purchase order page is created as a PDF document including UNAUTHORIZED embedded into the document signature box.

State of Vermont

Department of Liquor Control
13 Green Mountain Drive

PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, DELIVERY MEMORANDA, BILLS OF LADING, PACKAGES AND CORRESPONDENCE.

| Purchase Order | Date | Revision | Page |
|------------------|---------------|------------|----------|
| 02300-000004445 | 08-30-2018 | | 1 |
| Payment Terms | Freight Terms | PO Status | Currency |
| | Destination | Dispatched | USD |
| Buyer | Phone | | |
| Karen L. Symonds | 8280412 | | |

Supplier: 0000001293
Irving Energy
190 Commerce Way
Portsmouth NH 03801
United States

Ship To: Department of Liquor Control
13 Green Mountain Drive
Montpelier VT 05602
United States

Bill To: Department of Liquor Control
13 Green Mountain Drive
Montpelier VT 05602
United States

| Line-Sch | Description | Quantity | UOM | Unit Price | Extended Amt | Due Date |
|----------|----------------------|----------|-----|------------|--------------|------------|
| 1 - 1 | LIQUID PROPANE - GAS | 860.00 | GAL | 0.01 | 8.60 | 09/29/2018 |

DIST: 1

Chartfields

| Status | Percentage | PO Qty | Amount |
|--------|------------|----------|--------|
| Open | 100.0000 | 860.0000 | 8.600 |

| GLUnit | Account | Fund | Dept |
|--------|---------|-------|------------|
| 02300 | 520110 | 50300 | 2300007000 |

Details / Gas

| BaseAmt | BaseCurrency | Currency | Location | Consiged |
|---------|--------------|----------|------------|----------|
| 8.600 | USD | USD | POLCMTF001 | N |

Item Total 8.60
000000000000000
8661

Total PO Amount 8.60

Unauthorized

Printing a Dispatched Purchase Order is Complete

Print a Purchase Order for Authorized Signature

Situations when this function is used: You need to print a PO for authorized signature.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

Navigator Menu navigation: Purchasing > Purchase Orders > Add/Update POs

Purchase Order needs to be in **Approved – PO Status** and **Valid – Budget Status**

Maintain Purchase Order

Purchase Order

Business Unit 01110
PO ID 0000000959

Copy From [v]

PO Status Approved
Budget Status Valid

☐ Hold From Further Processing

Header ?

*PO Date 01/23/2019 Supplier Search
*Supplier PRESIDIONE-001 Supplier Details
*Supplier ID 0000294841 Presidio Networked Solutions
*Buyer ETEST Ella Test

PO Reference Rubrik Back Up Solution

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Print

Dispatch

Amount Summary ?

| | | |
|---------------------|--------|-----|
| Merchandise | 100.00 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 100.00 | USD |
| Encumbrance Balance | 100.00 | USD |

Calculate

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

1. Click on **Dispatch**

The **Dispatch Options** page displays:

Dispatch Options

☐ Use One Ship To

Ship To PFMMTP002

Dispatch Options

Fax Cover Page [v]
Server Name [v]
*Output Destination Type WEB
Output Destination Format PDF
Template ID [v]

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

OK Cancel Refresh

2. Click **OK**

The following **Message** opens:

Message

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

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

Yes No



3. Click **Yes**


You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order


Purchase Order


Business Unit 01110
PO ID 0000000959
Copy From


PO Status **Dispatched**  
Budget Status Valid
☐ Hold From Further Processing

Header 

*PO Date 01/23/2019 Supplier Search
*Supplier PRESIDIONE-001 Supplier Details
*Supplier ID 0000294841 Presidio Networked Solutions
*Buyer ETEST Ella Test
PO Reference Rubrik Back Up Solution

Doc Tol Status Valid
Backorder Status Not Backordered Create BackOrder
Receipt Status Not Recvd
*Dispatch Method Print  Dispatch

Amount Summary 

| | | |
|---------------------|--------|---|
| Merchandise | 100.00 | |
| Freight/Tax/Misc. | 0.00 |  |
| Total Amount | 100.00 | USD |
| Encumbrance Balance | 100.00 | USD |

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

PO Status = Dispatched.

You will now need to Navigate to the Report Manager to print the Purchase Order.

WorkCenter Navigation: Purchasing WorkCenter > Reports/Queries Tab > Reports/Processes > Report Monitoring > Report Manager



Navigator Menu navigation: Reporting Tools > Report Manager

The **Report Manager** page displays, click on the **Administration** tab:



List | Explorer | **Administration** | Archives

View Reports For

User ID ESTUBIN Type Last 1 Days Refresh
Status Folder Instance to

Report List Personalize | Find | View All |   First 1-5 of 5 Last

| Select | Report ID | Prcs Instance | Description | Request Date/Time | Format | Status | Details |
|--------------------------|-----------|---------------|-------------------------------|-----------------------|--------------------|--------|-------------------------|
| <input type="checkbox"/> | 2619800 | 9473399 | PO_DISPATCH - PO_DISPATCH.pdf | 01/23/2019 2:41:23PM | Acrobat (*.pdf) | Posted | Details |
| <input type="checkbox"/> | 2619797 | 9473395 | Comm. Cntrl. Budget Processor | 01/23/2019 2:15:14PM | Text Files (*.txt) | Posted | Details |
| <input type="checkbox"/> | 2619776 | 9473374 | AMR_JGEN | 01/23/2019 12:28:44PM | Text Files (*.txt) | Posted | Details |
| <input type="checkbox"/> | 2619772 | 9473370 | PS/AP Voucher Posting | 01/23/2019 12:09:10PM | Text Files (*.txt) | Posted | Details |
| <input type="checkbox"/> | 2619771 | 9473369 | Comm. Cntrl. Budget Processor | 01/23/2019 12:09:10PM | Text Files (*.txt) | Posted | Details |

☒ Select All ☐ Deselect All
 Delete Click the delete button to delete the selected report(s)
 Save

List | Explorer | Administration | Archives

4. Click on the link in the Description box



Finance and Management Department
Division of Financial Operations

Dispatch and Print a Purchase Order from the Run Control Process

Purchase Order needs to be in **Approved – PO Status** and **Valid – Budget Status**:

The screenshot shows the 'Maintain Purchase Order' interface. At the top, the 'Purchase Order' section displays 'Business Unit 01110', 'PO ID 0000000953', and 'Change Order 1'. A 'Copy From' dropdown is set to '1'. To the right, a box highlights the status fields: 'PO Status' is 'Approved' and 'Budget Status' is 'Valid'. There are up and down arrow icons next to these status labels. Below this, a checkbox for 'Hold From Further Processing' is present. The 'Header' section contains fields for '*PO Date' (11/26/2018), '*Supplier' (WBMASONCOI-001), '*Supplier ID' (0000283240), and '*Buyer' (CTOUCHET). It also includes links for 'Supplier Search', 'Supplier Details', and 'Doc Tol Status Valid'. On the right side of the header, there are fields for 'Backorder Status' (Not Backordered), 'Receipt Status' (Not Recvd), and '*Dispatch Method' (Print). A 'Create BackOrder' button and a 'Dispatch' button are also visible.

The Purchase Order will not be dispatched.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Purchase Orders > Dispatch Purchase Orders

Navigator Menu navigation: Purchasing > Purchase Orders > Dispatch POs

The **Dispatch Purchase Orders** page displays, click on the **Add a New Value** button:

The screenshot shows the 'Dispatch Purchase Orders' interface. At the top, there is a search bar with the text 'Find an Existing Value'. Below this, the 'Add a New Value' button is highlighted. In the main area, there is a text input field for '*Run Control ID' containing the value 'Dispatch_PO_Print'. Below this field, the 'Add' button is highlighted with a red box.

1. **Run Control ID** - Enter a run control ID, Example: Dispatch_PO_Print
2. Click **Add**

The **Dispatch POs** page displays:

Dispatch POs

Run Control ID Dispatch_PO_Print Report Manager Process Monitor **Run**

Language English Specified Language Recipient's Language

Process Request Parameters

Business Unit 01110

To

PO ID 0000000953 Select Purchase Order

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Fax Cover Page

Template ID

Statuses to Include

☐ Approved ☐ Dispatched ☐ Pending Cancel

Dispatch Methods to Include

☒ Print ☒ FAX ☒ EDX

☒ E-Mail ☒ Phone

Miscellaneous Options

*Chartfields Valid Chartfields

Change Orders Changed and UnChanged Orders

☐ Print Changes Only ☐ Print BU Comments

☐ Test Dispatch ☒ Print PO Item Description

☐ Print Copy ☐ Print Duplicate

Sort By Sort by Line Number

Save **Notify** **Add** **Update/Display**

In the **Process Request Parameters** box

3. **Business Unit** - Enter a valid BU
4. **PO ID** - Enter a valid PO number (click the **Magnifying Glass** next to the PO ID field to select from a list of values)

In the **Miscellaneous Options** box

5. Change the value in the **Chartfields** box from **Valid Chartfields** to **Recycled AND Valid Chartfields**
6. Click **Save**
7. Click **Run**

The **Process Scheduler Request** window opens:

Process Scheduler Request

User ID ESTUBIN Run Control ID Dispatch_PO_Print

Server Name Run Date 01/23/2019 Run Time 3:46:50PM Reset to Current Date/Time

Recurrence Time Zone

Process List

| Select | Description | Process Name | Process Type | *Type | *Format | Distribution |
|-------------------------------------|--------------------------|--------------|--------------------|--------|---------|--------------|
| <input checked="" type="checkbox"/> | PO BI Publisher Dispatch | POXMLP | PSJob | (None) | (None) | Distribution |
| <input type="checkbox"/> | Email | PO_PO_EMAIL | Application Engine | Web | TXT | Distribution |

OK **Cancel**

8. Select **PO BI Publisher Dispatch**
9. Click **OK**

You are returned to the **Dispatch POs** page:

Dispatch POs

Run Control ID Dispatch_PO_Print

Report Manager

Process Monitor

Run

Language English

Specified Language

Recipient's Language

Process Instance:9473410

Process Request Parameters

Business Unit01110

To

PO ID0000000953Select Purchase Order

PO Status Approved

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Fax Cover Page

Template ID

Statuses to Include

Approved

Dispatched

Pending Cancel

Dispatch Methods to Include

Print

FAX

EDX

E-Mail

Phone

Miscellaneous Options

*ChartfieldsValid Chartfields

Change OrdersChanged and UnChanged Orders

Print Changes Only

Print BU Comments

Test Dispatch

Print PO Item Description

Print Copy

Print Duplicate

Sort BySort by Line Number

Save

Notify

Add

Update/Display

Process Instance is initiated

10. Click on the **Report Manager** link

The **Report Manager** page displays, click on the **Administration** link:

List Explorer Administration Archives

View Reports For

User ID EHOEFEL

Type

Last

1

Days

Refresh

Status

Folder

Instance

to

Report List

1-1 of 1

View All

| Select | Report ID | Pracs Instance | Description | Request Date/Time | Format | Status | Details |
|--------------------------|-----------|----------------|-------------------------------|----------------------|-----------------|--------|---------|
| <input type="checkbox"/> | 5514114 | 12437244 | PO_DISPATCH - PO_DISPATCH.pdf | 01/22/2024 7:45:26AM | Acrobat (*.pdf) | Posted | Details |

☒ Select All

☐ Deselect All

Delete

Click the delete button to delete the selected report(s)

Go back to Dispatch Purchase Orders

Save

List Explorer Administration Archives

11. Click on the **link** in the Description box

Purchase Orders 101 Manual - February 2024

Page 84 of 86

The document will open in a new browser window:



State of Vermont
Finance and Management Department
Division of Financial Operations

Supplier: 0000283240
W.B. Mason Co., Inc.
68 Nesti Drive
South Burlington VT 05403
United States

Ship To: Finance and Management Department
Division of Budget Operations
109 State St
Montpelier VT 05609-0401
United States

Bill To: Finance and Management Department
Division of Financial Operations
109 State St 4th Flr
Montpelier VT 05609-5901
United States

| Line-Sch | Description | Quantity | UOM | Unit Price | Extended Amt | Due Date |
|----------|-----------------|----------|-----|------------|--------------|------------|
| 1 - 1 | OFFICE SUPPLIES | 200.00 | EA | 0.01 | 2.00 | 12/26/2018 |

| | |
|------------|------|
| Item Total | 2.00 |
|------------|------|

| | |
|-----------------|------|
| Total PO Amount | 2.00 |
|-----------------|------|

Authorized Signature

Date _____

12. Click **Print**

Dispatch and Print a Purchase Order from the Run Control Process is Complete

Reports & Queries

A complete listing of reports and queries available in VISION for the Purchasing module can be found in the [Purchasing Reporting Manual](#).