

PO Change Orders

Core Support Training

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For all other change order inquiries please contact DOTCore.Support@ct.gov



Modify Price/Dollar Amount or Quantity

(This action WILL initiate a change order)



PO Change Orders: Modify Price or Quantity

1. Navigate to 'Add/Update POs'.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the 'Find an Existing Value' tab.

Purchase Order

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

Business Unit

PO ID

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

PO Change Orders: Modify Price or Quantity

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

The screenshot shows the 'Purchase Order' search interface. The 'Business Unit' field is set to 'DOTM1'. The 'PO ID' field is highlighted with a red box, and a red arrow points to a callout box showing 'PO ID begins with 0000188617'. Another red arrow points to a callout box showing 'PO ID contains 188617'. The interface includes various search criteria fields, a 'Search' button, and a 'Limit the number of results to (up to 300): 300' field.

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼ [] 🔍

Purchase Order Date = ▼ [] 📅

PO Status = ▼ []

Short Supplier Name begins with ▼ [] 🔍

Supplier ID begins with ▼ [] 🔍

Supplier Name begins with ▼ [] 🔍

Buyer begins with ▼ [] 🔍

Buyer Name begins with ▼ [] 🔍

PO Type = ▼ []

Purchase Order Reference begins with ▼ []

Hold From Further Processing

Case Sensitive

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

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

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

PO Change Orders: Modify Price or Quantity

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

Purchase Order

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

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

▼ **Search Criteria**

Business Unit = 🔍

PO ID contains

Purchase Order Date = 📅

PO Status =

Short Supplier Name begins with 🔍

Supplier ID begins with 🔍

Supplier Name begins with 🔍

Buyer begins with 🔍

Buyer Name begins with 🔍

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

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

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


Search Results

View All First 1 of 1 Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEII	DOT-Kwolek Ellen S	General	(blank)	N

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

PO Change Orders: Modify Price or Quantity



7. Click the change order icon (**blue triangle**)  to open up the fields available for edit.
8. Make the appropriate changes in either the 'Price' field, or to the 'Qty'.

(In this example, PO Line 1 'Price' will be changed from \$531.00 to \$525.00)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched  
Budget Status Valid Hold From Further Processing

Header ?

*PO Date 03/27/2018 Supplier Search Doc Tot Status Valid
*Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered Create BackOrder
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
*Buyer KwolekEII DOT-Kwolek Ellen S *Dispatch Method Email Dispatch

PO Reference

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

Amount Summary ?



Merchandise	1,369.46	USD	Calculate
Freight/Tax/Misc.	0.00		
Total Amount	1,369.46		
Encumbrance Balance	1,369.46		
Obligation Amount	1,369.46		











Add Items From ?

Catalog Item Search
Purchasing Kit

Select Lines To Display ?

Search for Lines Line To Retrieve

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 

View Printable Version
View Approvals

*Go to More ...

PO Change Orders: Modify Price or Quantity (Amount Only)

9. For an **Amount Only** line item, make the adjustment in the 'Price' field. Only the '**Price**' and '**Merchandise Amount**' fields can be adjusted on Amount Only line items, as the quantity is fixed. Any change in 'Price' will reflect in the 'Merchandise Amount' field once the page is refreshed, or saved.

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000176424

Copy From

PO Status Dispatched
Budget Status Valid

Hold From Further Processing

Header ?

*PO Date 02/22/2017 Supplier Search
*Supplier 061035087F-001 Supplier Details
*Supplier ID 0000010046 TILCON CONNECTICUT INC
*Buyer SaleseM DOT-Salese Michael J

PO Reference DOT0053-0177CN

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

Amount Summary ?

Merchandise	1,020,203.34	USD	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00		
Total Amount	1,020,203.34		
Encumbrance Balance	984,960.62		
Obligation Amount	1,020,203.34		

Add Items From ?
Catalog Item Search

Select Lines To Display ?
Search for Lines Line To

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		DOT0053-0177CN - D-1 - Construction; Resurfacing, Bridge and Safety Improvements on Route 2	1.0000	EA	72000000 <input type="button" value="Search"/>	1,020,203.340 <input type="button" value="Search"/>	1,020,203.34	Approved	<input type="button" value="Comment"/>	<input type="button" value="Print"/>	<input type="button" value="+"/> <input type="button" value="-"/>

View Printable Version
View Approvals

*Go to

PO Change Orders: Modify Price or Quantity

10. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the **'Add Comments'** link.

(Note: If comments already exist in the PO Header the link will display as **'Edit Comments'**.)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
 PO ID 0000188617
 Copy From

PO Status Dispatched ▲ ✖
 Budget Status Not Chk'd
 Hold From Further Processing

Header ?

*PO Date 03/27/2018 Supplier Search Doc Tot Status Valid
 *Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered Create BackOrder
 *Supplier ID 0000010578 GRAYSTONE_GROUP_ADVERTISING Receipt Status Not Recvd
 *Buyer KwolekEll DOT-Kwolek Ellen S *Dispatch Method Email Dispatch

PO Reference

Header Details
 PO Defaults
 PO Activities
 Requisitions
 Actions

Activity Summary
Edit Comments
 Add ShipTo Comments
 Document Status

Amount Summary ?

Merchandise	1,369.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,369.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	

Calculate

Add Items From ?

Catalog
 Purchasing Kit

Item Search

Select Lines To Display ?

Search for Lines Line To Retrieve

Lines ?


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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving					
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	To be published in the	1.0000	EA	55000000	525.00	531.00	Approved				
2	<input type="text"/>	To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved				

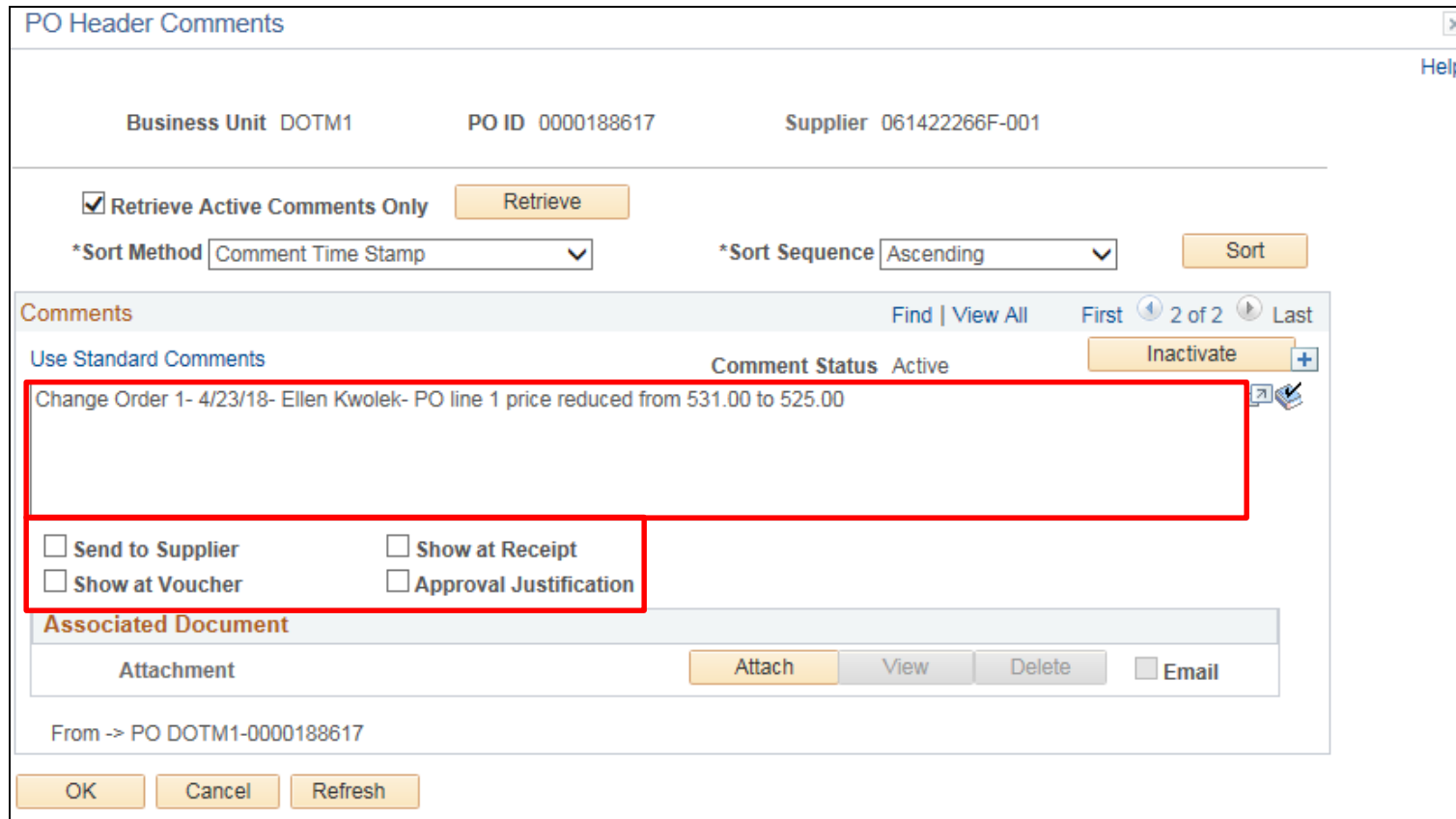
View Printable Version
 View Approvals

*Go to More ...

PO Change Orders: Modify Price or Quantity

11. Enter the change order comment in the **'Comments'** box shown below– Include further details, if necessary.
Note: In addition to the header comment, you can also leave an individual line comment on a line by clicking the quote bubble  located next to the **'Status'** field.
12. The checkboxes (below the comment box) allow buyers to share comments with the supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification



PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only

*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active

Change Order 1- 4/23/18- Ellen Kwolek- PO line 1 price reduced from 531.00 to 525.00

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification

Associated Document

Attachment Email

From -> PO DOTM1-0000188617

PO Change Order Form

13. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018


This form certifies that the appropriate approvals have been given and that proper funding is in place.

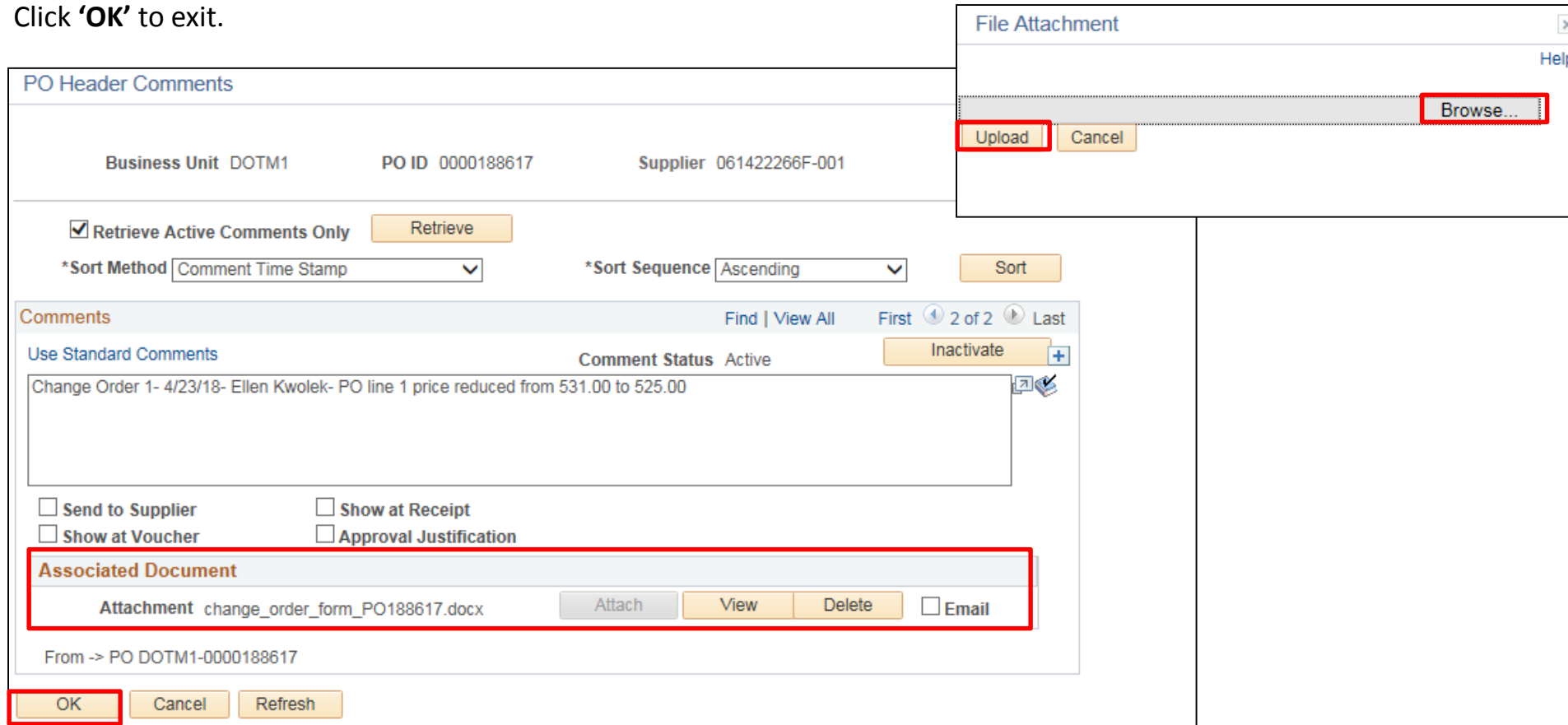
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Modify Price or Quantity

14. Complete the **Change Order Form** with the appropriate information.
15. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
16. Click the **'Attach'** button to attach the completed form to the change order comment. 
17. Click **'Browse'** to select the file from **Choose a File to Upload** window.
18. Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below.
19. Click **'OK'** to exit.



The screenshot displays the 'PO Header Comments' form. The 'Business Unit' is DOTM1, 'PO ID' is 0000188617, and 'Supplier' is 061422266F-001. A 'Retrieve' button is present next to a checked 'Retrieve Active Comments Only' option. The '*Sort Method' is set to 'Comment Time Stamp' and '*Sort Sequence' is 'Ascending'. A 'Sort' button is also visible.

The 'Comments' section shows a single comment: 'Change Order 1- 4/23/18- Ellen Kwolek- PO line 1 price reduced from 531.00 to 525.00'. The comment status is 'Active'. Below the comment, there are four checkboxes: 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification', all of which are currently unchecked.

The 'Associated Document' section is highlighted with a red box and contains the following information:

Attachment	Attach	View	Delete	Email
change_order_form_PO188617.docx	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/>

From -> PO DOTM1-0000188617

At the bottom of the form, there are three buttons: 'OK', 'Cancel', and 'Refresh'. The 'OK' button is highlighted with a red box.

A 'File Attachment' dialog box is overlaid on the right side of the form. It has a title bar with a close button, a 'Help' link, and a 'Browse...' button highlighted with a red box. Below the dialog box, there are 'Upload' and 'Cancel' buttons, with the 'Upload' button also highlighted with a red box.

PO Change Orders: Modify Price or Quantity

Below illustrates the PO after adjusting the price to \$525.00. Notice the line 1 'Merchandise Amount' now reflects the change in Price, along with the PO 'Merchandise' and 'Total Amount' in Amount Summary.

The 'Encumbrance Balance' will reflect the new amount once the PO has been re-approved.

- Click the 'Header Details' and adjust the PO Obligation, accordingly. (See next slide)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617

PO Status Dispatched ✘
Budget Status Valid

Copy From

Hold From Further Processing

Header

*PO Date 03/27/2018 Supplier Search
*Supplier 061422266F-001 Supplier Details
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
*Buyer KwolekEll DOT-Kwolek Ellen S

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

PO Reference

Amount Summary

Merchandise	1,363.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,363.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	

Header Details (highlighted in red)

- Activity Summary
- Edit Comments
- PO Activities
- Requisitions
- Document Status

Amount Summary (highlighted in red)

- Merchandise 1,363.46 USD
- Freight/Tax/Misc. 0.00
- Total Amount 1,363.46

Encumbrance Balance 1,369.46

Obligation Amount 1,369.46

Add Items From

Catalog Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	525.00000	525.00	Approved
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

View Printable Version
View Approvals

*Go to

Save Return to Search Notify Refresh Add Update/Display

PO Change Orders: Modify Price or Quantity

21. Enter the new **PO Obligation** in the '**Obligation Amount**' field. This typically matches the PO '**Total Amount**'. Your Total PO Amount should never exceed your Obligation Amount.
22. Click '**OK**'.

The screenshot shows the 'PO Header Details' form with several sections. The 'Obligation Amount' field is highlighted with a red box and contains the value '1363.46'. A red arrow points from a blue callout box to this field. The callout box contains the text: 'In this example, the new PO Total Amount is \$1,363.46'. The 'OK' button at the bottom left is also highlighted with a red box.

PO Header Details	
PO Details	
Supplier 061422266F-001	PO Date 03/27/2018
*PO Type GEN	Budget Status Valid
*Billing Location DOTM1ADJ	<input checked="" type="checkbox"/> Tax Exempt
Origin 947 DOT-ENGINE	ID 066000798DOT
<input type="checkbox"/> Use One Ship To	Letter of Credit ID
	Ship To 0940000117
Currency	
Currency Code USD	Base Currency USD
Rate Date 01/01/1900	Exchange Rate 1.00000000
Rate Type CRRNT	
Process Control Option	
<input checked="" type="checkbox"/> Dispatch	Acknowledgements required for Not required
*Method Print	Accounting Date 03/27/2018
	Accounting Template STANDARD
Obligation Amount	
Obligation Amount	1363.46
Start Date 02/28/2018	
End Date 06/30/2018	
OK Cancel Refresh	

PO Change Orders: Modify Price or Quantity

23. Click 'Save' at the bottom of the screen.

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched ✖
Budget Status Valid
 Hold From Further Processing

Header ⓘ

*PO Date ⓘ Supplier Search
*Supplier Supplier Details
*Supplier ID GRAYSTONE GROUP ADVERTISING
*Buyer ⓘ DOT-Kwolek Ellen S

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

PO Reference

Header Details
PO Defaults
PO Activities
Requisitions
▼ Actions

Activity Summary
Edit Comments
Add ShipTo Comments
Document Status

Amount Summary ⓘ

Merchandise	1,363.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,363.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,363.46	

Calculate

Add Items From ⓘ

Catalog
Purchasing Kit

Item Search

Select Lines To Display ⓘ

Search for Lines Line To Retrieve

Lines ⓘ

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	<input type="text" value="1.0000"/>	EA	<input type="text" value="55000000"/> ⓘ	<input type="text" value="525.00000"/>	525.00	Approved			<input type="button" value="+"/> <input type="button" value="-"/>
2		To be published in the New London Day on March 7 and 21, 2018	<input type="text" value="1.0000"/>	EA	<input type="text" value="55000000"/> ⓘ	<input type="text" value="838.46000"/>	838.46	Approved			<input type="button" value="+"/> <input type="button" value="-"/>

View Printable Version
View Approvals

*Go to

Save

PO Obligation is now updated.

PO Change Orders: Modify Price or Quantity

NOTE: Creating a change order will cause the PO to go back through approvals. Notice the 'PO Status' is now *Pend Appr* and the 'Budget Status' is *Not Chk'd*. There is also a 'Change Order' number in the upper left hand corner under the PO ID.

The 'Change Order' field keeps track of the number of change orders performed during the life of the PO.

Maintain Purchase Order
Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From [dropdown]

PO Status: Pend Appr
Budget Status: Not Chk'd

Hold From Further Processing

Header

*PO Date 03/27/2018
*Supplier 061422266F-001
*Supplier ID 0000010578
*Buyer KwolekEil

Supplier Search
Supplier Details
GRAYSTONE GROUP ADVERTISING
DOT-Kwolek Ellen S

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

Amount Summary

Merchandise	1,363.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,363.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,363.46	

Add Items From

Catalog
Purchasing Kit

Select Lines To Display

Search for Lines Line [] To [] Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	525.00000	525.00	A Pending
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	A Pending

Modify Chartfield Coding

(This action does NOT initiate a change order)



PO Change Orders: Modify Chartfield Coding

1. Navigate to 'Add/Update POs'.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the 'Find an Existing Value' tab.

Purchase Order

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

Business Unit

PO ID

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

PO Change Orders: Modify Chartfield Coding

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to contains, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼ 31

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍

PO Type = ▼

Purchase Order Reference begins with ▼

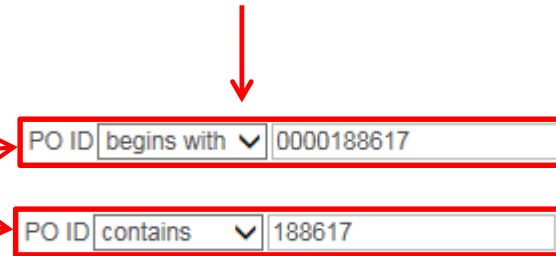
Hold From Further Processing

Case Sensitive

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

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

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



PO Change Orders: Modify Chartfield Coding

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

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

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

Search Criteria

Business Unit =

PO ID contains

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

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

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



Search Results











View All First 1 of 1 Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEII	DOT-Kwolek Ellen S	General	(blank)	N

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

PO Change Orders: Modify Chartfield Coding

- Click the **'Schedule'** icon  located next to the Line Comments field. The **Schedules** window will appear.
- Click on the **'Distributions/Chartfields'** icon to review the PO line item's chartfield Information. 



Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 

Maintain Purchase Order







Schedules

Unit DOTM1 Supplier 061422266F-001 PO Status Dispatched
PO ID 0000188617 PO Date 03/27/2018

[Return to Main Page](#) [Find | View All](#) First 2 of 2 Last

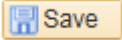
Line	Item	To be published in the New Lon		PO Qty	1.0000 EA	Merchandise Amt	838.46 USD
Schedules Personalize Find View All First 1 of 1 Last							
Details Statuses Shipment Matching Receiving Freight RTV							
Sched	*Due Date	*Ship To		*PO Qty	Price	Merchandise Amount	Status
1	 03/27/2018	0940000117		1.0000	838.46000	838.46	Active

Add ShipTo Comments

 Save  Return to Search  Notify  Refresh  Add  Update/Display

PO Change Orders: Modify Chartfield Coding

The **Schedule Distribution** will display.

9. Make any necessary changes on the Open distribution.
10. Click **'OK'** to exit the **Distributions** window.
11. Click **'Save'**. You could click save on the Schedule page, or at the bottom of the main page of the PO.  Just click **'Return to Main Page'** link right above the line information.

Distributions for Schedule 1 Help

Unit DOTM1 Supplier 061422266F-001
PO ID 0000188617 Item To be published in the New London Day on March 7 and 21, 2018
Line 2
Schedule 1 Status Active

*Distribute By Schedule Qty 1.0000
Merchandise Amount 838.46 USD
SpeedChart Doc. Base Amount 838.46 USD
Multi-SpeedCharts

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

Chartfields	Details/Tax	Asset Information	Req Detail	Statuses	Budget Information							
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Fund	Dept	SID	Program	*Account	Bud Ref
1	Canceled				USD	STATE	13033	DOT57195	41393	34001	51510	
2	Open	<input type="text" value="100.0000"/>	<input type="text" value="1.0000"/>	<input type="text" value="838.46"/>	USD	<input type="text" value="STATE"/>	<input type="text" value="13033"/>	<input type="text" value="DOT57195"/>	<input type="text" value="4139"/>	<input type="text" value="34001"/>	<input type="text" value="51510"/>	<input type="text"/>

Modify a Contract

This action WILL initiate a change order



PO Change Orders: Modify a Contract

1. Navigate to **'Add/Update POs'**.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the **'Find an Existing Value'** tab.

Purchase Order

Find an Existing Value | **Add a New Value**

Business Unit

PO ID

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

PO Change Orders: Modify Contract

- 3. The **'Business Unit'** field should default as *DOTM1*.
- 4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. (Example: *0000188617* or *188617*) (Illustrated below)

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

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

Search Criteria

Business Unit =

PO ID

Purchase Order Date =

PO Status =

Short Supplier Name

Supplier ID

Supplier Name

Buyer

Buyer Name

PO Type =

Purchase Order Reference

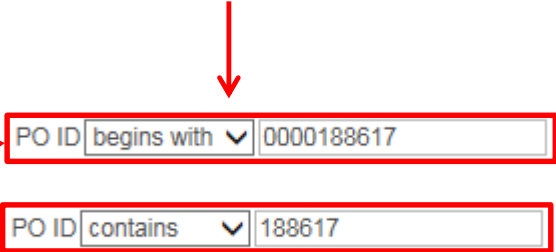
Hold From Further Processing

Case Sensitive

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

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

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



PO Change Orders: Modify Contract

- 5. Click 'Search'
 - 6. Click on the 'PO ID' hyperlink in your Search Results.
- If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

Purchase Order

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

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

Search Criteria

Business Unit =

PO ID contains

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

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

[Basic Search](#)


Search Results

View All First 1 of 1 Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEII	DOT-Kwolek Ellen S	General	(blank)	N

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



PO Change Orders: Modify Contract


7. Click the 'Line Details' icon on the PO line you would like to adjust. 

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
 PO ID 0000188617
 Copy From

PO Status Dispatched  
 Budget Status Valid
 Hold From Further Processing


Header 

*PO Date 03/27/2018 Supplier Search
 *Supplier 061422266F-001 Supplier Details
 *Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
 *Buyer KwolekEII DOT-Kwolek Ellen S

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


PO Reference

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


Amount Summary 

Merchandise	1,369.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,369.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	




Calculate











Add Items From 

Catalog Item Search
 Purchasing Kit

Select Lines To Display 

Search for Lines Line To Retrieve





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

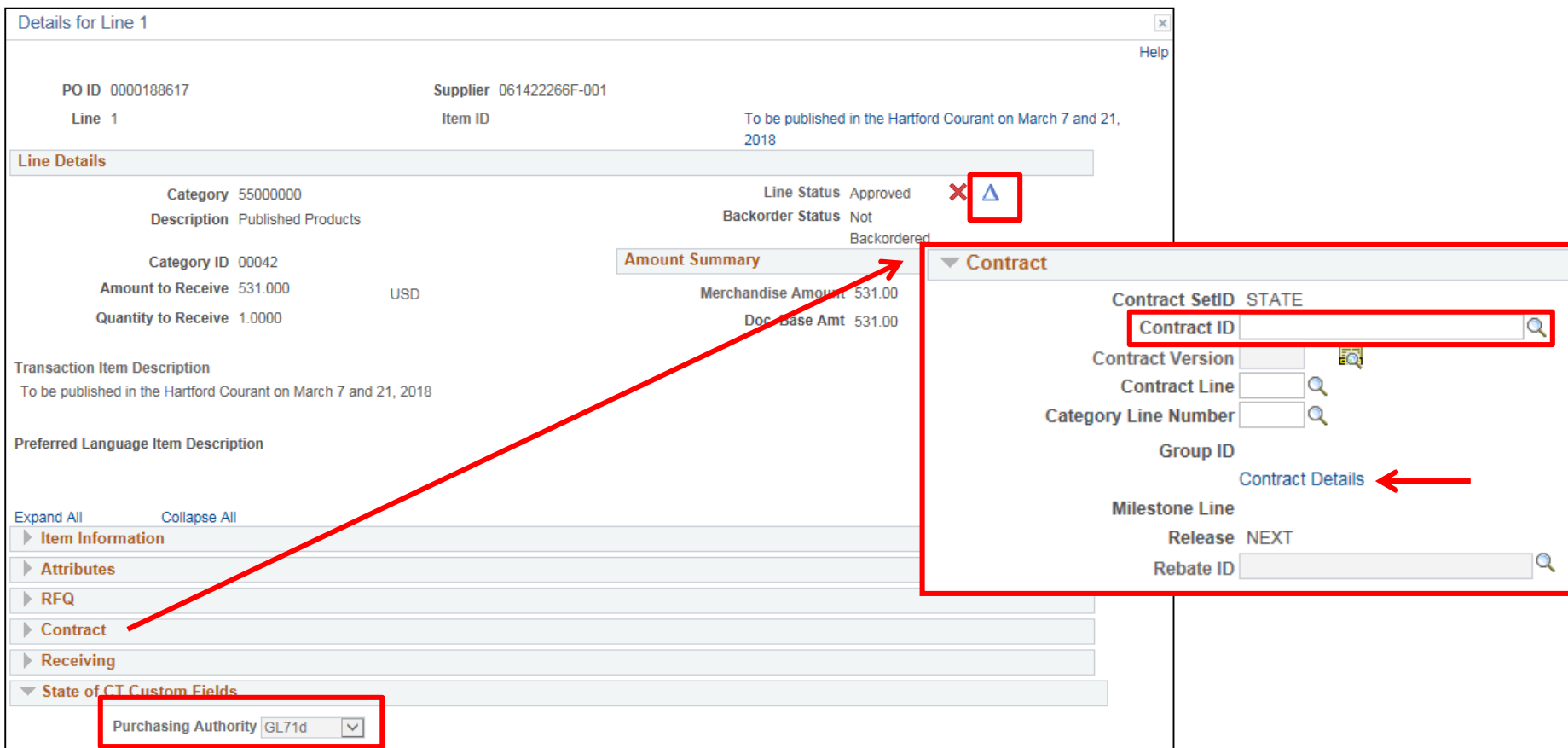
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 

View Printable Version
 View Approvals

*Go to

PO Change Orders: Modify Contract

- Click on the change order icon (**blue triangle**)  at in top right corner of the **Line Details** page.
- The screen will exit back to the Main Page of the PO. Click the **'Line Details'** icon again to return. 
- Click on the gray arrow  to expand the **Contract** section, as shown below.
- Enter the **'Contract ID'**. Or use the magnifying glass  to search available contracts for your supplier. You can click the **'Contract Details'** link to view the contract information, if necessary.
- The **'Purchasing Authority'** at the bottom of the page should be **Contracts**. Make the change if necessary.
- Click **'OK'** at the bottom of the page to exit **Line Details**.





Details for Line 1

PO ID 0000188617 Supplier 061422266F-001

Line 1 Item ID To be published in the Hartford Courant on March 7 and 21, 2018

Line Details

Category 55000000 Line Status Approved  

Description Published Products Backorder Status Not Backordered

Category ID 00042

Amount to Receive 531.000 USD Merchandise Amount 531.00

Quantity to Receive 1.0000 Doc. Base Amt 531.00

Amount Summary

Transaction Item Description
To be published in the Hartford Courant on March 7 and 21, 2018

Preferred Language Item Description

Expand All Collapse All

Item Information

Attributes

RFQ

Contract

Receiving


State of CT Custom Fields


Purchasing Authority GL71d


Contract

Contract SetID STATE


Contract ID

Contract Version 

Contract Line 

Category Line Number 

Group ID

[Contract Details](#) 

Milestone Line

Release NEXT

Rebate ID

PO Change Orders: Modify Contract

14. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the 'Add Comments' link.

(NOTE: If comments already exist in the PO Header the link will display as 'Edit Comments'.)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
 PO ID 0000188617
 Copy From

PO Status Dispatched ✖
 Budget Status Valid
 Hold From Further Processing

Header ?

*PO Date 03/27/2018 Supplier Search
 *Supplier 061422266F-001 Supplier Details
 *Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
 *Buyer KwolekEII DOT-Kwolek Ellen S

PO Reference

Header Details
 PO Defaults
 PO Activities
 Requisitions
 Actions

Activity Summary
Edit Comments
 Add ShipTo Comments
 Document Status

Doc Tol Status Valid
 Backorder Status Not Backordered [Create BackOrder](#)
 Receipt Status Not Recvd
 *Dispatch Method Print [Dispatch](#)

Amount Summary ?

Merchandise	1,369.46	USD	
Freight/Tax/Misc.	0.00		Calculate
Total Amount	1,369.46		
Encumbrance Balance	1,369.46		
Obligation Amount	1,369.46		

Add Items From ?

Catalog
 Purchasing Kit

Item Search

Select Lines To Display ?

Search for Lines Line To [Retrieve](#)


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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving					
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	To be published in the <input type="text"/>	1.0000	EA	55000000	531.00000	531.00	Approved	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

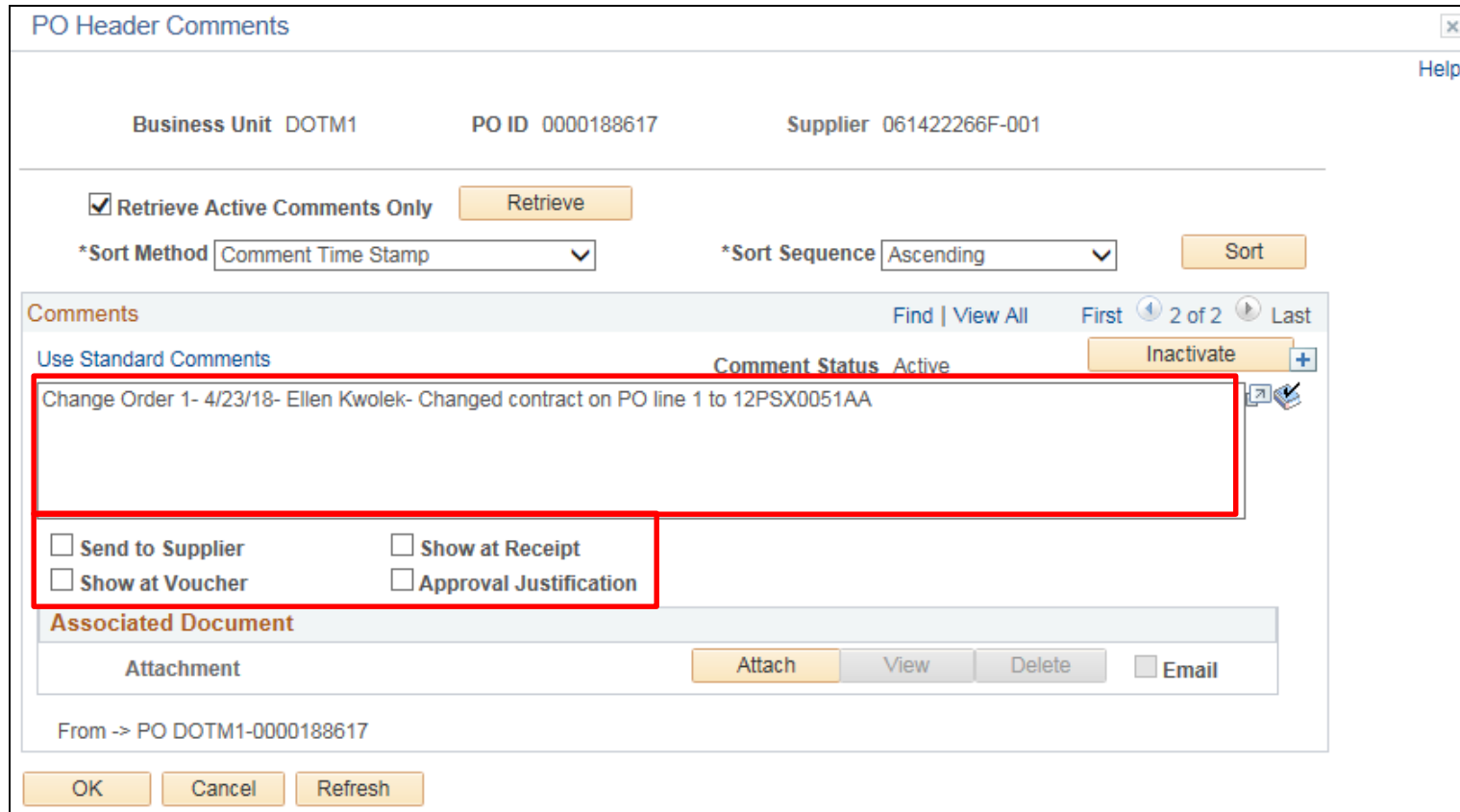
View Printable Version
 View Approvals

*Go to More ...

PO Change Orders: Modify Contract

15. Enter the change order comment in the **'Comments'** box shown below– Include further details, if necessary.
Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble  located on each PO line next to the **'Status'** field.
16. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification



PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only

*Sort Method *Sort Sequence

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active

Change Order 1- 4/23/18- Ellen Kwolek- Changed contract on PO line 1 to 12PSX0051AA

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment Email

From -> PO DOTM1-0000188617

PO Change Order Form

17. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018



This form certifies that the appropriate approvals have been given and that proper funding is in place.

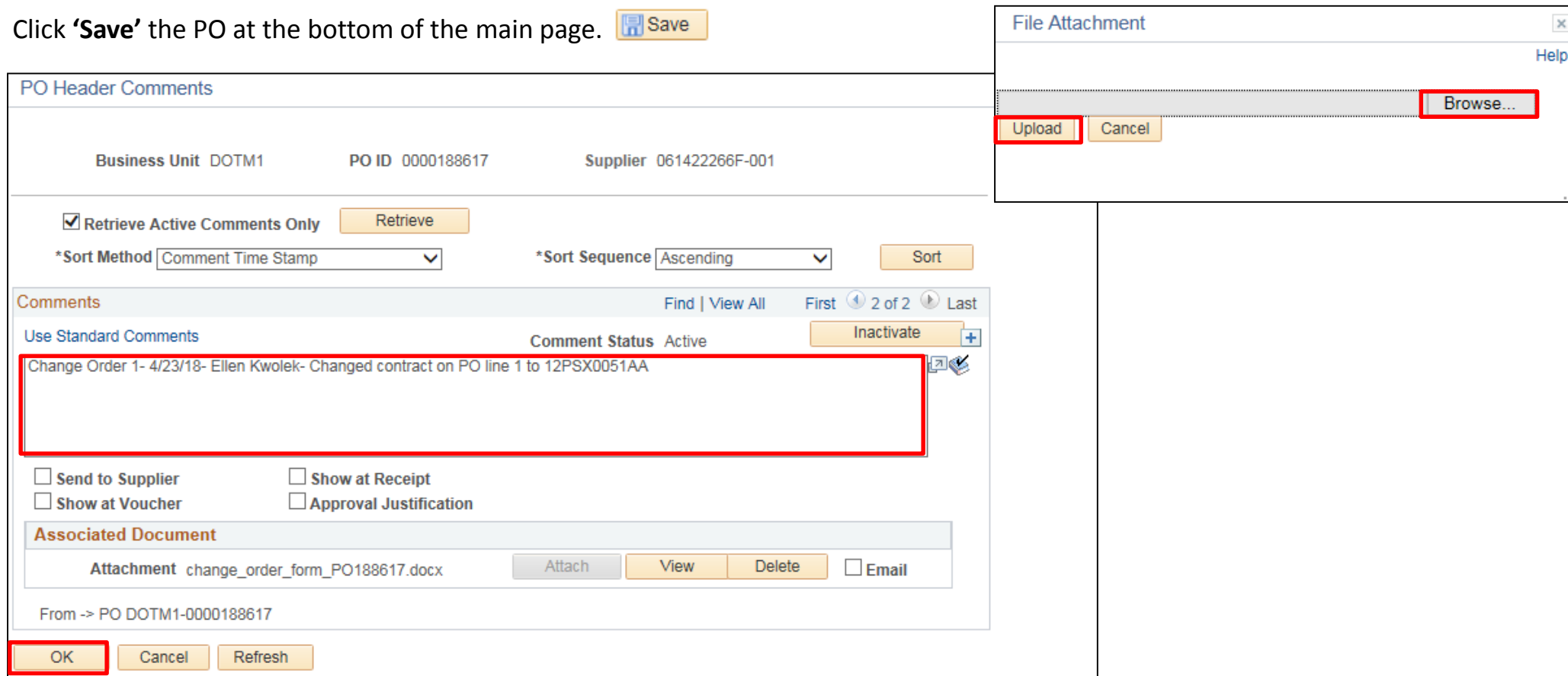
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Modify Contract

18. Complete the **Change Order Form** with the appropriate information.
19. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
20. Click the **'Attach'** button to attach the completed form to the change order comment. 
21. Click **'Browse'** to select the file from **Choose a File to Upload** window.
22. Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below.
23. Click **'OK'** to exit.
24. Click **'Save'** the PO at the bottom of the main page. 



The screenshot displays the 'PO Header Comments' section of a software interface. At the top, it shows 'Business Unit DOTM1', 'PO ID 0000188617', and 'Supplier 061422266F-001'. Below this, there are options to 'Retrieve Active Comments Only' (checked) and a 'Retrieve' button. A '*Sort Method' dropdown is set to 'Comment Time Stamp' and a '*Sort Sequence' dropdown is set to 'Ascending', with a 'Sort' button. The 'Comments' section shows a single comment: 'Change Order 1- 4/23/18- Ellen Kwolek- Changed contract on PO line 1 to 12PSX0051AA'. Below the comment are checkboxes for 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'. The 'Associated Document' section shows an attachment named 'change_order_form_PO188617.docx' with buttons for 'Attach', 'View', 'Delete', and 'Email'. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons. A 'File Attachment' dialog box is open on the right, showing the 'Browse...' button, 'Upload' button, and 'Cancel' button.

PO Change Orders: Modify Contract

NOTE: Creating a change order will cause the PO to go back through approvals. Notice the 'PO Status' is now *Pend Appr* and the 'Budget Status' is *Not Chk'd*. There is also a 'Change Order' number in the upper left hand corner under the PO ID.

The 'Change Order' field keeps track of the number of change orders performed during the life of the PO.

Maintain Purchase Order
Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From [v]

PO Status: Pend Appr
Budget Status: Not Chk'd

Hold From Further Processing

Header

*PO Date 03/27/2018
*Supplier 061422266F-001
*Supplier ID 0000010578
*Buyer KwolekEII
PO Reference

Supplier Search
Supplier Details
GRAYSTONE GROUP ADVERTISING
DOT-Kwolek Ellen S

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

Amount Summary

Merchandise	1,369.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,369.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	

Add Items From

Catalog
Purchasing Kit

Select Lines To Display

Search for Lines Line [] To [] Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Pending
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Pending

Modify Unit of Measure

This action WILL initiate a change order



PO Change Orders: Modify Unit of Measure

1. Navigate to **'Add/Update POs'**.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the **'Find an Existing Value'** tab.

Purchase Order

Find an Existing Value | **Add a New Value**

Business Unit

PO ID

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

PO Change Orders: Modify Unit of Measure

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to contains, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

Purchase Order

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍


PO Type = ▼

Purchase Order Reference begins with ▼

Hold From Further Processing

Case Sensitive

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

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

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



PO Change Orders: Modify Unit of Measure

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍
PO ID contains ▼ 188617
Purchase Order Date = ▼ 📅
PO Status = ▼ ▼
Short Supplier Name begins with ▼ 🔍
Supplier ID begins with ▼ 🔍
Supplier Name begins with ▼ 🔍
Buyer begins with ▼ 🔍
Buyer Name begins with ▼ 🔍
PO Type = ▼ ▼
Purchase Order Reference begins with ▼

Hold From Further Processing
 Case Sensitive
Limit the number of results to (up to 300):

Search | **Clear** | [Basic Search](#) 📄 | [Save Search Criteria](#)

Search Results

View All First ⏪ 1 of 1 ⏩ Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEII	DOT-Kwolek Ellen S	General	(blank)	N

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



PO Change Orders: Modify Unit of Measure

7. Click the 'Line Details' icon on the PO line you would like to adjust. 


Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched  
Budget Status Valid


Hold From Further Processing

Header 


*PO Date 03/27/2018 Supplier Search Doc Tol Status Valid
*Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered Create BackOrder
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
*Buyer KwolekEll DOT-Kwolek Ellen S *Dispatch Method Email Dispatch

PO Reference


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

Amount Summary 




Merchandise 1,369.46 USD
Freight/Tax/Misc. 0.00 Calculate
Total Amount 1,369.46
Encumbrance Balance 1,369.46
Obligation Amount 1,369.46











Add Items From 

Catalog Item Search
Purchasing Kit

Select Lines To Display 

Search for Lines Line To Retrieve


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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	HR	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 

View Printable Version
View Approvals

*Go to More ...

PO Change Orders: Modify Unit of Measure



- Click on the change order icon (**blue triangle**)  at in top right corner of the **Line Details** page. The screen will exit back to the main page of the PO.
- You will see that the Unit of Measure (**'UOM'**) field is now open and available for edit. Make the necessary change.
- Click **'Save'** at the bottom of the main page of the PO.
- Perform steps 7-10 for each line that needs to be adjusted. (PLEASE REFER TO NEXT SLIDE)

Details for Line 1 Help

PO ID 0000188617 Supplier 061422266F-001

Line 1 Item ID To be published in the Hartford Courant on March 7 and 21, 2018

Line Details

Category 55000000 Line Status Approved  



Description Published Products Backorder Status Not Backordered

Category ID 00042













Amount Summary

Amount to Receive 531.000 USD Merchandise Amount 531.00 USD

Quantity to Receive 1.0000 Doc. Base Amt 531.00 USD







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

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the 	1.0000	EA 	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 

[View Printable Version](#) *Go to

[View Approvals](#)

 Save  Return to Search  Notify  Refresh  Add  Update/Display

PO Change Orders: Modify Unit of Measure

IMPORTANT NOTE

If you receive the error message below please contact DOT Core Support at DOTCore.Support@ct.gov.
Otherwise, continue to the next slide.

Message

No conversion for UOM HR and UOM on at least one requisition sourced by this order. Resetting UOM. (10200,12)

This purchase order line sources at least one requisition line. There needs to be a conversion rate between the unit of measure used on the purchase order and the unit of measure used on the requisitions.

You can set up conversion rates on the unit of measure page.

OK

PO Change Orders: Modify Unit of Measure

12. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the **'Add Comments'** link.

(**NOTE:** If comments already exist in the PO Header the link will display as **'Edit Comments'**.)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
 PO ID 0000188617
 Copy From

PO Status Dispatched ▲ ✖
 Budget Status Valid
 Hold From Further Processing

Header ?

*PO Date 03/27/2018 Supplier Search Doc Tol Status Valid
 *Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered [Create BackOrder](#)
 *Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
 *Buyer KwolekEll DOT-Kwolek Ellen S *Dispatch Method Email
 PO Reference

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

Amount Summary ?

Merchandise	1,369.46	USD	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00		
Total Amount	1,369.46		
Encumbrance Balance	1,369.46		
Obligation Amount	1,369.46		

Add Items From ?

Catalog Purchasing Kit

Select Lines To Display ? Search for Lines Line


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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving							
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status						
1	<input type="text"/>	To be published in the <input type="text"/>	1.0000	EA	55000000	531.00000	531.00	Approved	<input type="button" value="Comment"/>	<input type="button" value="Print"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		
2	<input type="text"/>	To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved	<input type="button" value="Comment"/>	<input type="button" value="Print"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		

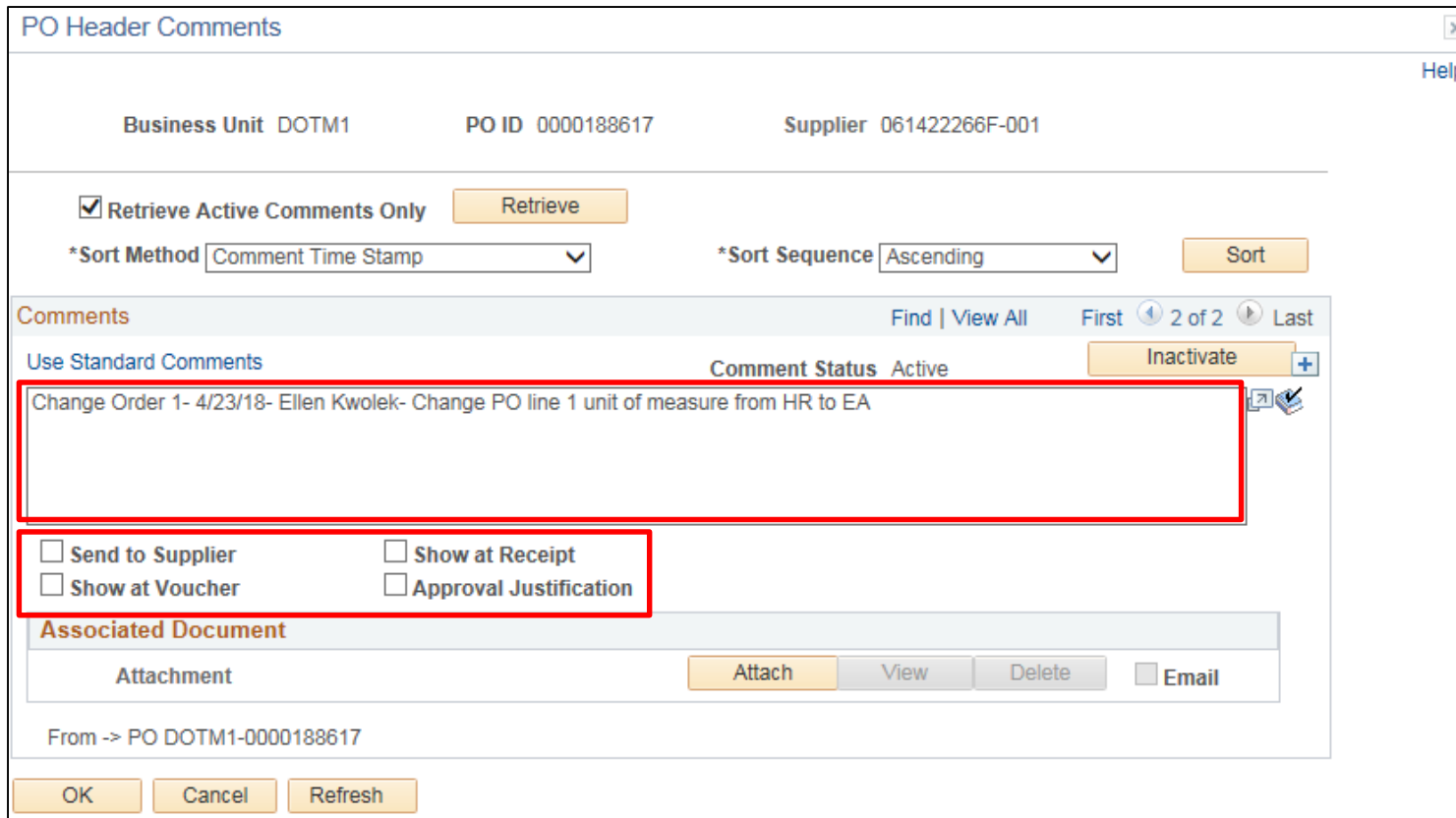
[View Printable Version](#)

[View Approvals](#)

PO Change Orders: Modify Unit of Measure

13. Enter the change order comment in the **'Comments'** box shown below– Include further details, if necessary.
Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble  located on each PO line next to the **'Status'** field.
14. The checkboxes (below the comment box) allow buyers to share comments with the supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification



PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate

Change Order 1- 4/23/18- Ellen Kwolek- Change PO line 1 unit of measure from HR to EA

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment Attach View Delete Email

From -> PO DOTM1-0000188617

OK Cancel Refresh

PO Change Order Form

15. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018

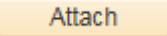

This form certifies that the appropriate approvals have been given and that proper funding is in place.

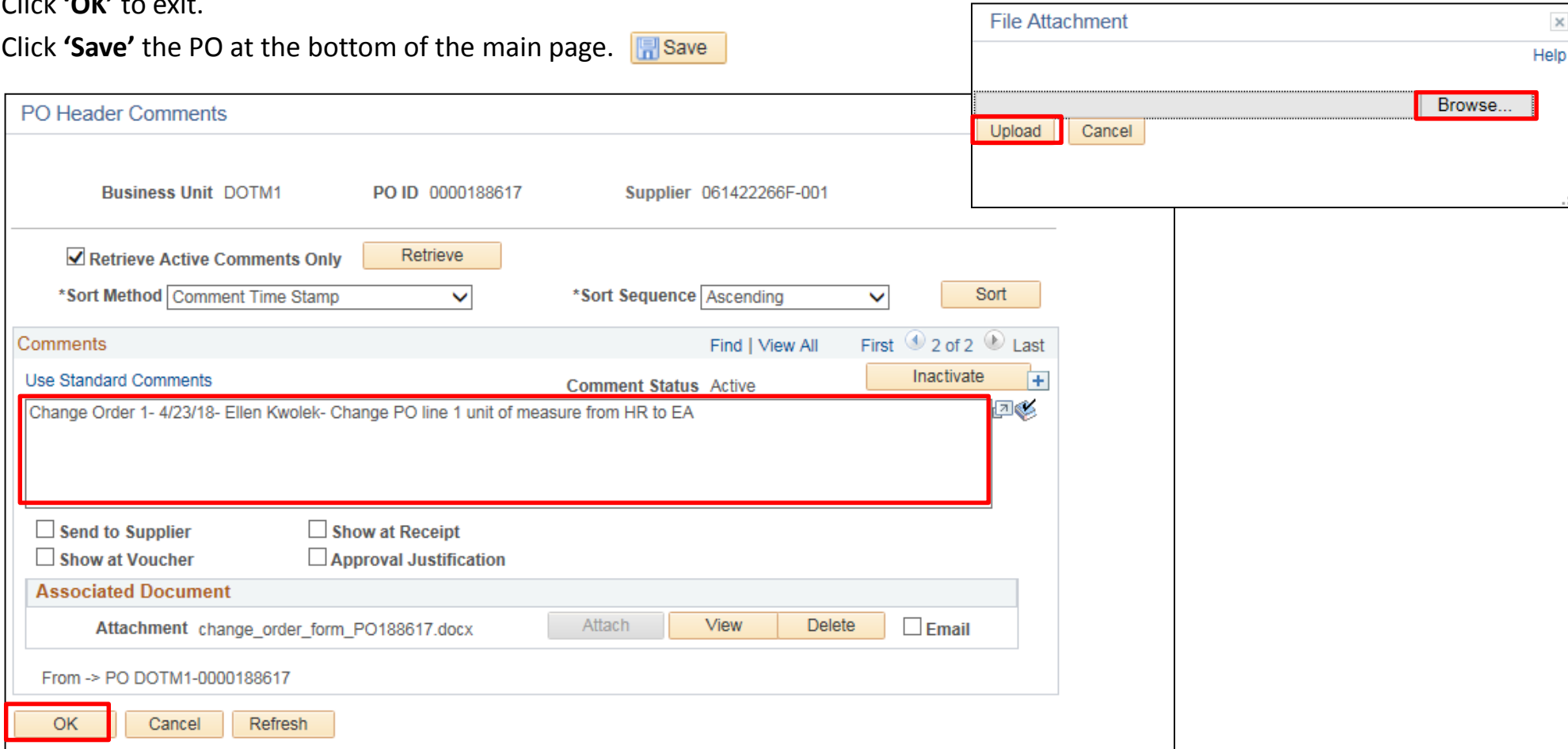
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Modify Unit of Measure

16. Complete the **Change Order Form** with the appropriate information.
17. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
18. Click the **'Attach'** button to attach the completed form to the change order comment. 
19. Click **'Browse'** to select the file from **Choose a File to Upload** window.
20. Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below.
21. Click **'OK'** to exit.
22. Click **'Save'** the PO at the bottom of the main page. 



The screenshot displays the 'PO Header Comments' form and a 'File Attachment' dialog box. The form includes fields for Business Unit (DOTM1), PO ID (0000188617), and Supplier (061422266F-001). It features a 'Retrieve' button and a 'Sort' button. The 'Comments' section shows a single comment: 'Change Order 1- 4/23/18- Ellen Kwolek- Change PO line 1 unit of measure from HR to EA'. Below the comment are checkboxes for 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'. The 'Associated Document' section lists an attachment: 'change_order_form_PO188617.docx', with buttons for 'Attach', 'View', 'Delete', and 'Email'. The 'File Attachment' dialog box is open, showing a 'Browse...' button and 'Upload' and 'Cancel' buttons. The 'OK' button at the bottom of the form is highlighted.

PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only

*Sort Method *Sort Sequence

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active

Change Order 1- 4/23/18- Ellen Kwolek- Change PO line 1 unit of measure from HR to EA

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment change_order_form_PO188617.docx Email

From -> PO DOTM1-0000188617

PO Change Orders: Modify Unit of Measure

Creating a change order will cause the PO to go back through approvals. Notice the 'PO Status' is now *Pend Appr* and the 'Budget Status' is *Not Chk'd*. There is also a 'Change Order' number in the upper left hand corner under the PO ID.

The 'Change Order' field keeps track of the number of change orders performed during the life of the PO.

PO Status: Pend Appr
Budget Status: Not Chk'd

PO Date: 03/27/2018
Supplier: 061422266F-001
Supplier ID: 0000010578
Buyer: KwolekEll

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

Amount Summary

Merchandise	1,363.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,363.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,363.46	

Add Items From: Catalog, Purchasing Kit, 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		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Pending
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Pending

Change Line to 'Amount Only'

This action WILL initiate a change order



PO Change Orders: Change Line to 'Amount ONLY'

1. Navigate to 'Add/Update POs'.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the 'Find an Existing Value' tab.

Purchase Order

Business Unit

PO ID

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

PO Change Orders: Change Line to 'Amount ONLY'

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to contains, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼ 📅

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍

PO Type = ▼

Purchase Order Reference begins with ▼

Hold From Further Processing

Case Sensitive

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

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

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

PO ID begins with ▼ 0000188617

PO ID contains ▼ 188617

PO Change Orders: Change Line to 'Amount ONLY'

5. Click 'Search'.
6. Click on the 'PO ID' hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍
PO ID contains ▼ 188617
Purchase Order Date = ▼ 📅
PO Status = ▼ ▼
Short Supplier Name begins with ▼ 🔍
Supplier ID begins with ▼ 🔍
Supplier Name begins with ▼ 🔍
Buyer begins with ▼ 🔍
Buyer Name begins with ▼ 🔍
PO Type = ▼ ▼
Purchase Order Reference begins with ▼

Hold From Further Processing
 Case Sensitive
Limit the number of results to (up to 300):

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


Search Results

View All First ◀ 1 of 1 ▶ Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEII	DOT-Kwolek Ellen S General	(blank)		N

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



PO Change Orders: Change Line to 'Amount ONLY'

- Click the 'Line Details' icon on the PO line you would like to adjust. 


Maintain Purchase Order

Purchase Order

Business Unit DOTM1
 PO ID 0000188617
 Copy From

PO Status Dispatched  
 Budget Status Valid


Hold From Further Processing

Header 


*PO Date 03/27/2018 Supplier Search Doc Tol Status Valid
 *Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered [Create BackOrder](#)
 *Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
 *Buyer KwolekEII DOT-Kwolek Ellen S *Dispatch Method Email

PO Reference


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

Amount Summary 


Merchandise	1,369.46	USD	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00		
Total Amount	1,369.46		
Encumbrance Balance	1,369.46		
Obligation Amount	1,369.46		



Add Items From 











Catalog Item Search
 Purchasing Kit

Select Lines To Display 

Search for Lines Line To

Lines 




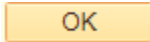
Personalize | Find | View All |   First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 

[View Printable Version](#)
[View Approvals](#)

*Go to More ...


PO Change Orders: Change Line to 'Amount ONLY'

- Click on the **Line Details**  icon on the line you would like adjust.
- Click the blue triangle  change icon in the top right corner.
- Click the gray arrow  to expand the **Attributes** section.
- Check the **'Amount Only'** box. Checking the 'Amount Only' box will automatically adjust the line distribution to **Amount based**, as well. This required for an amount only line item. 
- Click **'OK'** at the bottom of the Line Details page to return to the Main Page.

Details for Line 1 Help

PO ID 0000188617 Supplier 061422266F-001
Line 1 Item ID To be published in the Hartford Courant on March 7 and 21, 2018

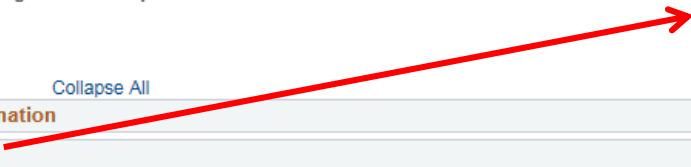
Line Details

Category 55000000	Line Status Approved 
Description Published Products	Backorder Status Not Backordered
Category ID 00042	
Amount to Receive 531.000 USD	Amount Summary
Quantity to Receive 1.0000	Merchandise Amount 531.00 USD
	Doc. Base Amt 531.00 USD

Transaction Item Description
To be published in the Hartford Courant on March 7 and 21, 2018

Preferred Language Item Description

Expand All Collapse All

- ▶ Item Information
- ▶ **Attributes** 
- ▶ RFQ
- ▶ Contract
- ▶ Receiving
- ▼ State of CT Custom Fields

Attributes

Physical Nature

*Price Qty

*Price Date

Amount Only

Purchasing Authority

PO Change Orders: Change Line to 'Amount ONLY'

13. Click 'OK' to the Message.

Message

The PO Qty will be 1 for an amount only line, the system will recalculate the merchandise amount (10200,273)

The PO Quantity will be 1 for an amount only line, the system will recalculate the merchandise amount, Continue?

The PO line will display a fixed 'Qty' of 1 and open 'Price' and 'Merchandise Amount' fields, as shown below on line 1.

FIXED PO Qty. on Line 1

OPEN Price and Merchandise Amount

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the	1.0000	EA	55000000	531.00000	531.00	Approved			
2		To be published in the	1.0000	EA	55000000	838.46000	838.46	Approved			

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

View Approvals

Save Return to Search Notify Refresh Add Update/Display

PO Change Orders: Change Line to 'Amount ONLY'

14. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the 'Add Comments' link.

(**NOTE:** If comments already exist in the PO Header the link will display as 'Edit Comments'.)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1 PO ID 0000188617
Copy From [dropdown]
PO Status Dispatched Budget Status Not Chk'd
Hold From Further Processing [checkbox]

Header

*PO Date 03/27/2018 Supplier Search Doc Tol Status Valid
*Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered Create BackOrder
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
*Buyer KwolekEII DOT-Kwolek Ellen S *Dispatch Method Email Dispatch

PO Reference [input]

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

Amount Summary

Merchandise	1,369.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,369.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	

Calculate

Add Items From Catalog Item Search Purchasing Kit


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

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

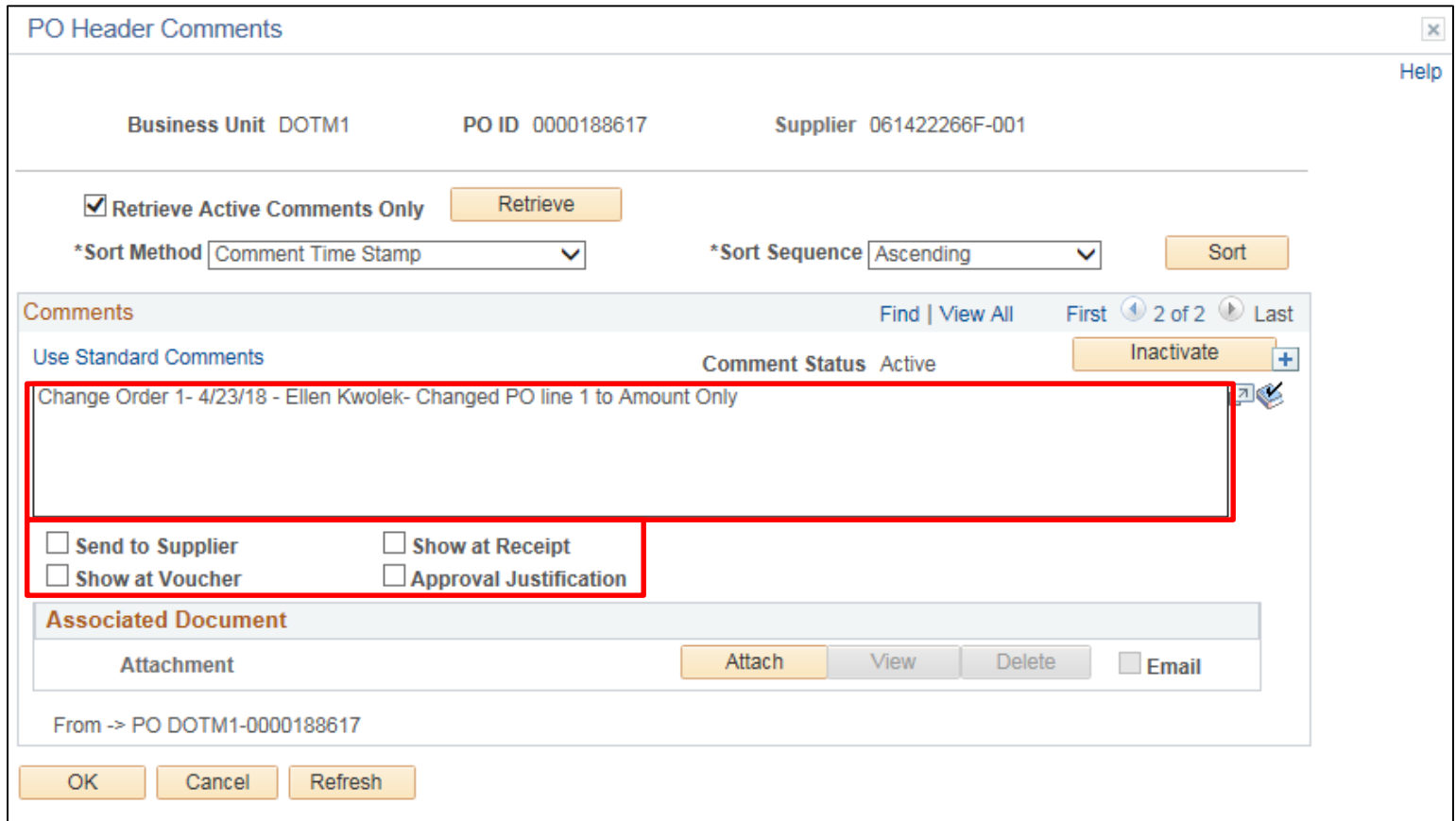
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	[input]	To be published in the [input]	1.0000	EA	55000000	531.00000	531.00	Approved
2	[input]	To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

View Printable Version View Approvals *Go to [input]

PO Change Orders: Change Line to 'Amount ONLY'

15. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble  located on each PO line next to the **'Status'** field.
16. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification



PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate

Change Order 1- 4/23/18 - Ellen Kwolek- Changed PO line 1 to Amount Only

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification

Associated Document

Attachment	Attach	View	Delete	Email
------------	--------	------	--------	-------

From -> PO DOTM1-0000188617

OK Cancel Refresh

PO Change Order Form

15. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018

This form certifies that the appropriate approvals have been given and that proper funding is in place.

Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Change Line to 'Amount ONLY'

NOTE: Creating a change order will cause the PO to go back through approvals. Notice the 'PO Status' is now *Pend Appr* and the 'Budget Status' is *Not Chk'd*. There is also a 'Change Order' number in the upper left hand corner under the PO ID.

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From

The 'Change Order' field keeps track of the number of change orders performed during the life of the PO.

PO Status: Pend Appr
Budget Status: Not Chk'd

Hold From Further Processing

Header

*PO Date 03/27/2018 Supplier Search
*Supplier 061422266F-001 Supplier Details
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
*Buyer KwolekEII DOT-Kwolek Ellen S

PO Reference

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

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

Amount Summary

Merchandise	1,363.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,363.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,363.46	

Calculate

Add Items From

Catalog Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the Hartford Courant on March 7 and 21, 2018	<input type="text"/>	1.0000 EA	55000000	531.00000	531.00	Pending
2		To be published in the New London Day on March 7 and 21, 2018	<input type="text"/>	1.0000 EA	55000000	838.46000	838.46	Pending

Add a New PO Line

This action WILL initiate a change order



PO Change Orders: Add a PO Line

- 1. Navigate to 'Add/Update POs'.



- 2. Select the 'Find an Existing Value' tab.

Purchase Order

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

Business Unit

PO ID

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

PO Change Orders: Add a PO Line

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to contains, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼ 📅

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍

PO Type = ▼

Purchase Order Reference begins with ▼

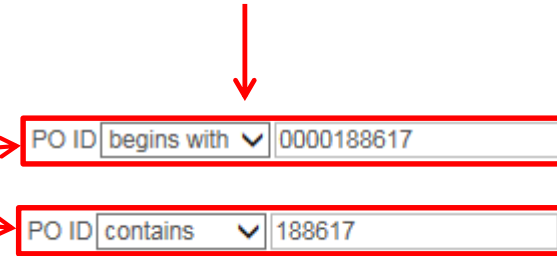
Hold From Further Processing

Case Sensitive

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

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

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



PO Change Orders: Add a PO Line

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

Purchase Order

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID contains ▼ 188617

Purchase Order Date = ▼ 📅

PO Status = ▼ ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍

PO Type = ▼ ▼

Purchase Order Reference begins with ▼

Hold From Further Processing

Case Sensitive

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

Search | Clear | Basic Search 📄 | Save Search Criteria

Search Results













View All First ⏪ 1 of 1 ⏩ Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEll	DOT-Kwolek Ellen S	General (blank)		N


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

PO Change Orders: Add a PO Line

- Click the change order icon (**blue triangle**)  in the top right corner of the PO.
- Click the **Add New Row** (plus icon)  on the last PO Line.


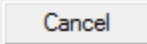
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000 	531.00000	531.00	Approved				
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000 	838.46000	838.46	Approved				

- Enter the amount of lines you would like to enter. You could enter one line a time or add multiple lines at once.

ct.gov needs some information 

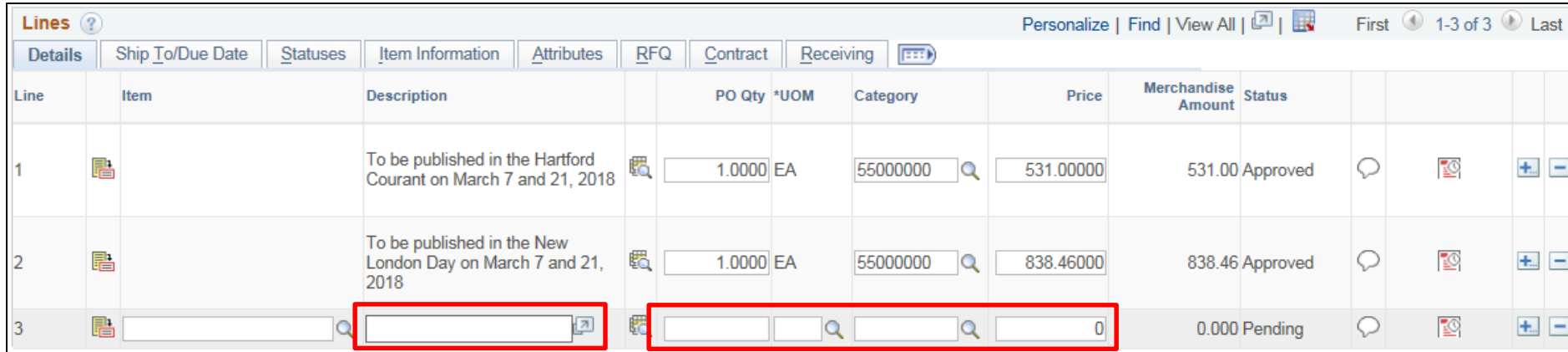
Script Prompt:
















Enter number of rows to add:

PO Change Orders: Add a PO Line

10. Enter the Item **'Description'**.
11. Enter the **'PO Qty'**. If you are creating an Amount Only line item, enter a PO Qty of 1.
12. Enter a Unit of Measure in the **'UOM'** field.
13. Enter the **'Category'**.
14. Enter the Item **'Price'**.





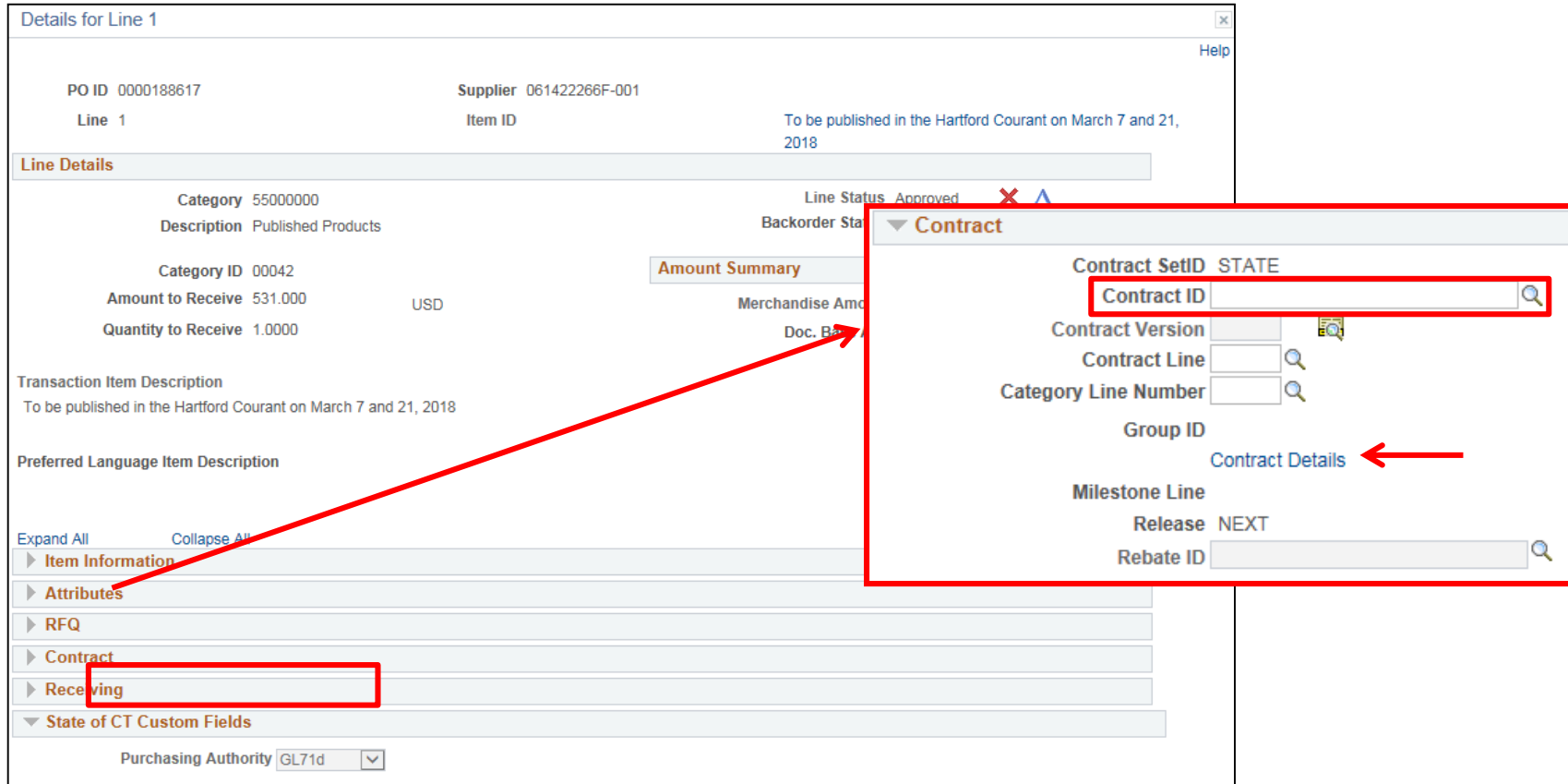
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved			 
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			 
3		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	0.000	Pending			 

15. Click the **'Line Details'** icon  to add the PO Contract.

(SEE NEXT SLIDE)

PO Change Orders: Add a PO Line

- Click on the gray arrow  to expand the **Contract** section, as shown below.
- Enter the **'Contract ID'**. Your contract ID should match the contract used on the previous lines. Only ONE contract can be used on a single PO. You could select the contract from the search  options, if preferred.
- The **'Purchasing Authority'** at the bottom of the page should be **Contracts**. Make the change if necessary.
- Click **'OK'** at the bottom of the page to exit **Line Details**.



Details for Line 1

PO ID 0000188617 Supplier 061422266F-001

Line 1 Item ID To be published in the Hartford Courant on March 7 and 21, 2018

Line Details

Category 55000000 Description Published Products Line Status Approved Backorder Status

Category ID 00042 Amount to Receive 531.000 USD Merchandise Amount 531.000 USD Quantity to Receive 1.0000 Doc. Base

Transaction Item Description
To be published in the Hartford Courant on March 7 and 21, 2018

Preferred Language Item Description

Expand All Collapse All

Item Information

Attributes

RFQ

Contract

Receiving

State of CT Custom Fields

Purchasing Authority GL71d

Contract

Contract SetID STATE

Contract ID

Contract Version

Contract Line

Category Line Number

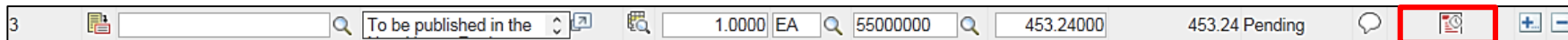
Group ID










Milestone Line

Release NEXT

Rebate ID

- Next you will need to enter your chartfield coding. Click the **'Schedule'** icon on the PO line. 



3   To be published in the  1.0000 EA  55000000  453.24000 453.24 Pending    

PO Change Orders: Add a PO Line

21. Click the 'Schedule' icon. 

Maintain Purchase Order

Schedules

Unit DOTM1 Supplier 061422266F-001 PO Status Dispatched
 PO ID 0000188617 PO Date 03/27/2018

Return to Main Page

Lines Find | View All First 3 of 3 Last

Line	Item	To be published in the New Hav	PO Qty	1.0000 EA	Merchandise Amt	453.24 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	12/03/2018	0940000117	1.0000	453.24000	453.24	Active

22. Click the 'Distribution' icon.

23. Enter or modify the distribution chartfields. (Including: Fund, Dept, SID, Program, Account, PC Bus Unit, Project)
 (If you entered any chartfield values on the PO Defaults page, these values will be populated automatically.)

Distributions for Schedule 1

Unit DOTM1 Supplier 061422266F-001
 PO ID 0000188617 Item To be published in the New Haven Register on March 7 and 21, 2018
 Line 3
 Schedule 1 Status Active

*Distribute By

SpeedChart Multi-SpeedCharts

Schedule Qty 1.0000
 Merchandise Amount 453.24 USD
 Doc. Base Amount 453.24 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	Fund	Dept	SID	Program	*Account	Bud Ref
1	Open	100.0000	1.0000	453.24	USD	STATE		DOT57195			54190	

PO Change Orders: Add a PO Line

The screen will return to the **Schedules** page.

24. Click the **'Return to Main Page'** link located below the 'PO ID' on the **Schedules** page. (Refer to slide 64)

Notice the PO **'Merchandise'** and **'Total Amount'** reflects the new PO Total Amount.
(The **'Encumbrance Balance'** will reflect the new amount once the PO has been re-approved.)

25. Click the **'Header Details'** to adjust the **PO Obligation**, accordingly. (See next slide)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched ✖
Budget Status Valid
 Hold From Further Processing

Header ?

*PO Date 03/27/2018 Supplier Search
*Supplier 061422266F-001 Supplier Details
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
*Buyer KwolekEII DOT-Kwolek Ellen S

Doc Tol Status Valid
Backorder Status Not Backordered [Create BackOrder](#)
Receipt Status Not Recvd
*Dispatch Method Print [Dispatch](#)

PO Reference

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

Amount Summary ?

Merchandise	1,822.70	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,822.70	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	

[Calculate](#)

Add Items From ?

Catalog [Item Search](#)
Purchasing Kit

Select Lines To Display ?

Search for Lines Line To [Retrieve](#)

PO Change Orders: Add a PO Line

25. Enter the new **PO Obligation** in the '**Obligation Amount**' field. This typically matches the PO '**Total Amount**'. Your Total PO Amount should never exceed your Obligation Amount.
26. Click '**OK**'.

The screenshot shows the 'PO Header Details' form with several sections. The 'Obligation Amount' section is highlighted with a red box, and the 'OK' button at the bottom left is also highlighted with a red box. A blue callout box with a red arrow points to the 'Obligation Amount' field, containing the text: 'In this example, the new PO Total Amount is \$1,822.70'. The form includes fields for Supplier, PO Date, PO Type, Billing Location, Origin, Currency Code, Exchange Rate, Process Control Option, and Accounting Template.

PO Header Details	
PO Details	
Supplier 061422266F-001	PO Date 03/27/2018
*PO Type GEN	Budget Status Valid
*Billing Location DOTM1AD	<input checked="" type="checkbox"/> Tax Exempt
Origin 947	ID 066000798DOT
<input type="checkbox"/> Use One Ship To	Letter of Credit ID
	Ship To 0940000117
Currency	
Currency Code USD	Base Currency USD
Rate Date 01/01/1900	Exchange Rate 1.00000000
Rate Type CRRNT	
Process Control Option	
<input checked="" type="checkbox"/> Dispatch	Acknowledgements required for Not required
*Method Print	Accounting Date 07/01/2018
	Accounting Template STANDARD
Obligation Amount	
Obligation Amount 1,822.70	
Start Date 02/28/2018	
End Date 06/30/2018	
OK	Cancel Refresh

PO Change Orders: Add a PO Line

27. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the **'Add Comments'** link.

If comments already exist in the PO Header the link will display as **'Edit Comments'**.)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched ✖
Budget Status Valid
 Hold From Further Processing

Header ?

*PO Date Supplier Search
*Supplier Supplier Details
*Supplier ID GRAYSTONE GROUP ADVERTISING
*Buyer DOT-Kwolek Ellen S
PO Reference

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

Amount Summary ?

Merchandise	1,822.70	USD	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00		
Total Amount	1,822.70		
Encumbrance Balance	1,369.46		
Obligation Amount	1,822.70		

Header Details
PO Defaults
PO Activities
Requisitions
▼ Actions

Activity Summary
Edit Comments
Add ShipTo Comments
Document Status

Add Items From ?

Catalog
Purchasing Kit


Item Search

Select Lines To Display ?

Search for Lines Line To

PO Obligation is now updated.

PO Change Orders: Add a PO Line

28. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble  located on each PO line next to the **'Status'** field.
29. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification

PO Header Comments Help

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only Retrieve

*Sort Method *Sort Sequence Sort

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate

Change Order 1- 4/23/18 - Ellen Kwolek - Added new line for New Haven Register ad on March 7 and 21

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification

Associated Document

Attachment	Attach	View	Delete	<input type="checkbox"/> Email
------------	--------	------	--------	--------------------------------

From -> PO DOTM1-0000188617

OK Cancel Refresh

PO Change Order Form

30. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018

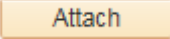
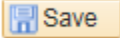
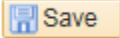
This form certifies that the appropriate approvals have been given and that proper funding is in place.

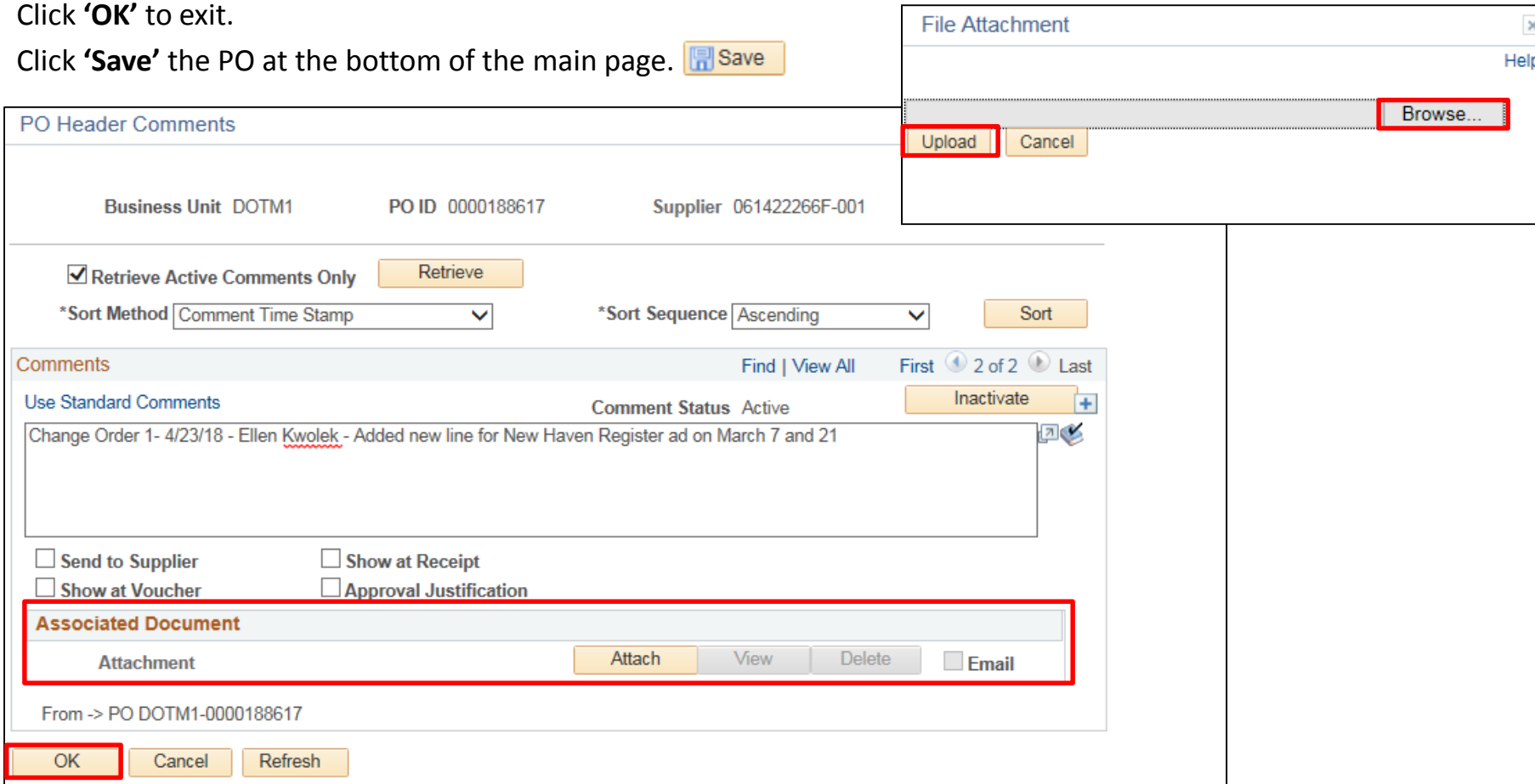
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Add a PO Line

31. Complete the **Change Order Form** with the appropriate information.
32. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
33. Click the **'Attach'** button to attach the completed form to the change order comment. 
34. Click **'Browse'** to select the file from **Choose a File to Upload** window.
35. Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below.
36. Click **'OK'** to exit. 
37. Click **'Save'** the PO at the bottom of the main page. 



The screenshot displays the 'PO Header Comments' section of a software interface. At the top, it shows 'Business Unit DOTM1', 'PO ID 0000188617', and 'Supplier 061422266F-001'. Below this, there are options to 'Retrieve Active Comments Only' (checked) and a 'Retrieve' button. A 'Sort Method' dropdown is set to 'Comment Time Stamp', and a '*Sort Sequence' dropdown is set to 'Ascending', with a 'Sort' button. The 'Comments' section shows a single comment: 'Change Order 1- 4/23/18 - Ellen Kwolek - Added new line for New Haven Register ad on March 7 and 21'. Below the comment are checkboxes for 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'. The 'Associated Document' section is highlighted with a red box and contains an 'Attachment' entry with buttons for 'Attach', 'View', 'Delete', and 'Email'. At the bottom of the form, there are 'OK', 'Cancel', and 'Refresh' buttons. A 'File Attachment' dialog box is overlaid on the right, showing 'Upload' and 'Cancel' buttons, and a 'Browse...' button highlighted with a red box.

Close a PO Line (Reduce to Expenditures)

This action WILL initiate a change order



PO Change Orders: Close a PO Line

1. Navigate to 'Add/Update POs'.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the 'Find an Existing Value' tab.

Purchase Order

Business Unit

PO ID

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

PO Change Orders: Close a PO Line

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to contains, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000185483 or 185483) (Illustrated below)

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼ 📅

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍

PO Type = ▼

Purchase Order Reference begins with ▼

Hold From Further Processing

Case Sensitive

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

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

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



PO Change Orders: Close a PO Line

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

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

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

Search Criteria

Business Unit =

PO ID contains

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

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

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



Search Results

View All First 1 of 1 Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000185483	12/26/2017	Dispatched	060845880F-001	0000000705	CAPITOL REGION COUNCIL OF GOVERNMENTS	ConroyC	DOT-Conroy Christine Grant	Grant	DOT0171043GR	N

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



PO Change Orders: Close a PO Line


- Click the change order icon (**blue triangle**)  in the top right corner of the PO.
- Click the **'Schedule'** icon on the line item you are reducing to expenditures. 

Maintain Purchase Order


Purchase Order

Business Unit DOTM1
PO ID 0000185483
Copy From


PO Status Dispatched  
Budget Status Valid
 Hold From Further Processing

Header 


*PO Date 12/26/2017 Supplier Search Doc Tol Status Valid
*Supplier 060845880F-001 Supplier Details Backorder Status Not Backordered [Create BackOrder](#)
*Supplier ID 0000000705 CAPITOL REGION COUNCIL OF GOVERNMENTS Receipt Status Partial
*Buyer ConroyC DOT-Conroy Christine *Dispatch Method Print
PO Reference Grant DOT0171043GR

Amount Summary 


Merchandise	450,000.00	USD	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00		
Total Amount	450,000.00		
Encumbrance Balance	138,933.83		
Obligation Amount	450,000.00		



Add Items From 







Catalog Item Search

Select Lines To Display 

Search for Lines Line To

Lines 


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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		Grant for Project No. DOT01710430GR	1.0000	EA	81000000 	450,000.0000	450,000.00	Approved			 

[View Printable Version](#)
[View Approvals](#)

*Go to More ...

PO Change Orders: Close a PO Line

9. Click the **'Distributions/Chartfields'** icon  on the line item you would like to reduce to expenditures.
(GO TO NEXT SLIDE)











Maintain Purchase Order

Schedules

Unit DOTM1 Supplier 060845880F-001 PO Status Dispatched
PO ID 0000185483 PO Date 12/26/2017

[Return to Main Page](#)

Lines Find | View All First 1 of 1 Last

Line	Item	Grant for Project No.	DOT01710	PO Qty	1.0000 EA	Merchandise Amt	450,000.00 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	 12/26/2017	0940000032		1.0000	450,000.00000	450,000.00	Active
							    

PO Change Orders: Close a PO Line

10. To verify the total expenditures to date:

- Click the **'Budget Information'** tab.
- The **'Expensed To Date'** field shows the total expended dollar amount of each distribution line.
- **The Total Expended Amount equals the sum of all distributions.** You can also subtract the **'Encumbrance Balance'** of the open distribution from the Total **'Merchandise Amount'** of the PO line. (Be sure to count all lines. Click **'View All'** to view all lines if they are not fully displayed.)
- **If you are adjusting a quantity based distribution, divide the total expended amount by the unit 'Price' to determine the total quantity received.**

222,596.55
+
88,469.62

(In this example the total amount expended dollar amount on PO line 1 is: **\$311,066.17**)

Distribution										
Personalize Find View All [?] [] First 1-2 of 2 Last										
Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information										
Dist	Status	Percent	Budget Status	Budg Dt	Encumbrance Balance	Currency	Encumbered Base Balance	Base Currency	Expensed To Date	Commitment Control Close Flag
1	Closed	49.4659	Bypass	12/26/2017	0.00	USD	0.000		222,596.55	<input checked="" type="checkbox"/>
2	Open	50.5341	Valid	07/01/2018	138933.83	USD	138,933.83	USD	88,469.62	<input type="checkbox"/>

OK Cancel Refresh

PO Change Orders: Close a PO Line

11. Return to the 'Chartfields' tab.

Below illustrates the **Distributions** window(s) – Quantity based and Amount based

12. Adjust the Open distribution line to the total amount expended. (SEE BELOW)

- **Amount Based**: Enter the total amount expended under '**Merchandise Amount**'
- **Quantity Based**: Enter the total quantity received under '**PO Qty**'

13. Click 'OK' to return to the **Schedules** page.

14. Click the 'Return to Main Page' link.

Amount based distributions (shown below) will have an open '**Merchandise Amount**'

Distribution												
Personalize Find View All [Print] [Grid] First 1-2 of 2 Last												
Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information												
Dist	Status	Percent	Merchandise Amount	Currency	*GL Unit	Fund	Dept	SID	Program	*Account	Bud Ref	ChartField 1
1	Closed	49.4659	222,596.55	USD	STATE	12052	DOT57551	43130	35002	55070		
2	Open	50.5341	227,403.45	USD	STATE	12052	DOT57551	43130	35002	55070		

OK Cancel Refresh

Quantity based distributions (shown below) will have an open '**Qty**'

Distribution													
Personalize Find View All [Print] [Grid] 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	Fund	Dept	SID	Program	*Account	Bud Ref	Char
1	Open	100.0000	100.0000	6,973.00	USD	STATE	12001	DOT57251	12518	34006	54072		

OK Cancel Refresh

PO Change Orders: Close a PO Line

15. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the **'Add Comments'** link.

(**NOTE:** If comments already exist in the PO Header the link will display as **'Edit Comments'**.)

Maintain Purchase Order

Purchase Order

Business Unit DOTM1 PO ID 0000188617
Copy From

PO Status Dispatched
Budget Status Not Chk'd Hold From Further Processing

Header

*PO Date 03/27/2018 Supplier Search Doc Tol Status Valid
*Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered [Create BackOrder](#)
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
*Buyer KwolekEII DOT-Kwolek Ellen S *Dispatch Method Email

PO Reference

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

Amount Summary

Merchandise	1,369.46	USD	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00		
Total Amount	1,369.46		
Encumbrance Balance	1,369.46		
Obligation Amount	1,369.46		

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To


Lines

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

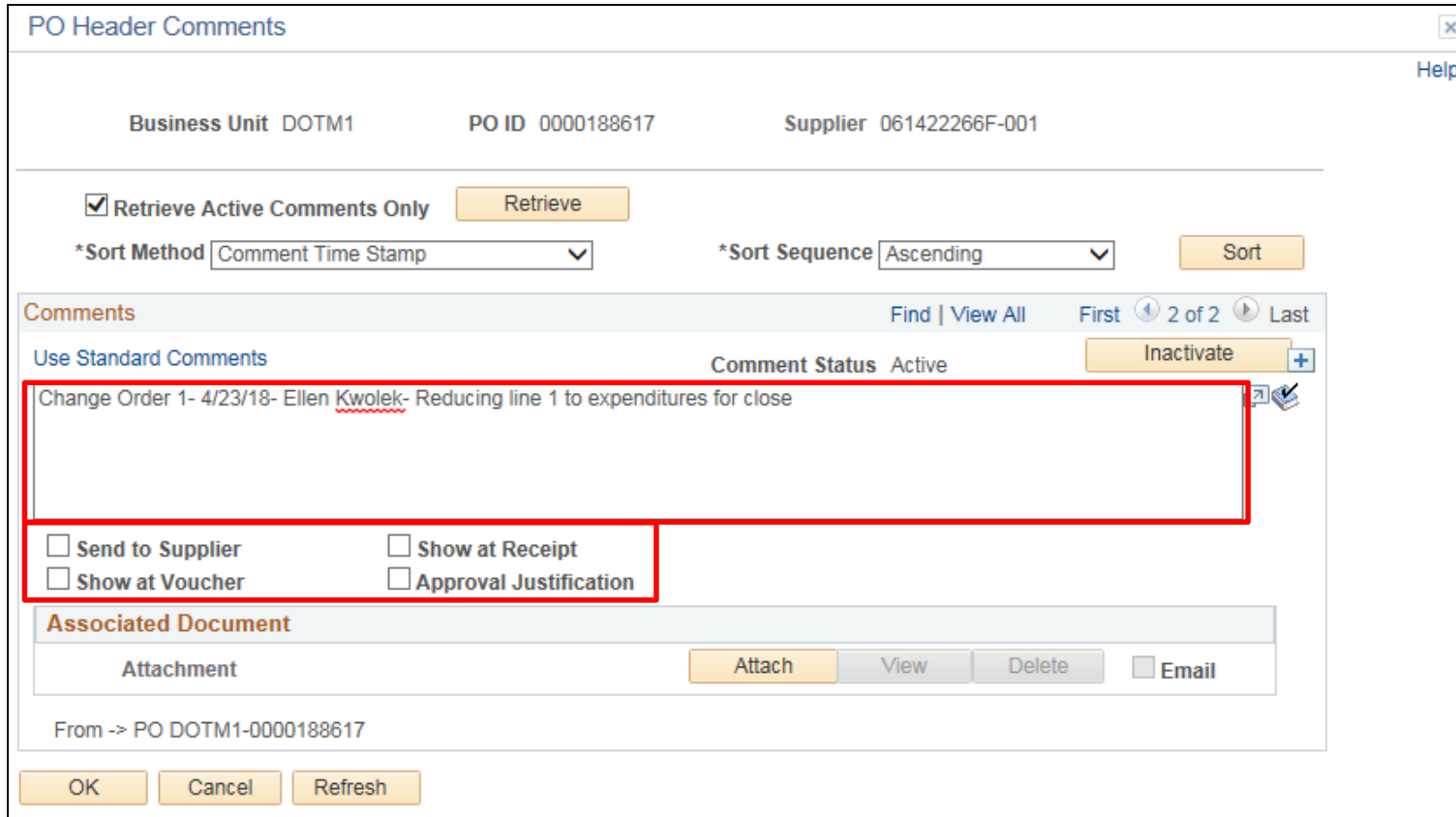
Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving						
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status					
1	<input type="text"/>	To be published in the	1.0000	EA	55000000	531.00000	531.00	Approved					
2	<input type="text"/>	To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved					

[View Printable Version](#) [View Approvals](#) *Go to

PO Change Orders: Close a PO Line

16. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble  located on each PO line next to the **'Status'** field.
17. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification



PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate

Change Order 1- 4/23/18- Ellen Kwolek- Reducing line 1 to expenditures for close

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment Attach View Delete Email

From -> PO DOTM1-0000188617

OK Cancel Refresh

PO Change Order Form

18. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018

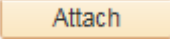
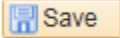
This form certifies that the appropriate approvals have been given and that proper funding is in place.

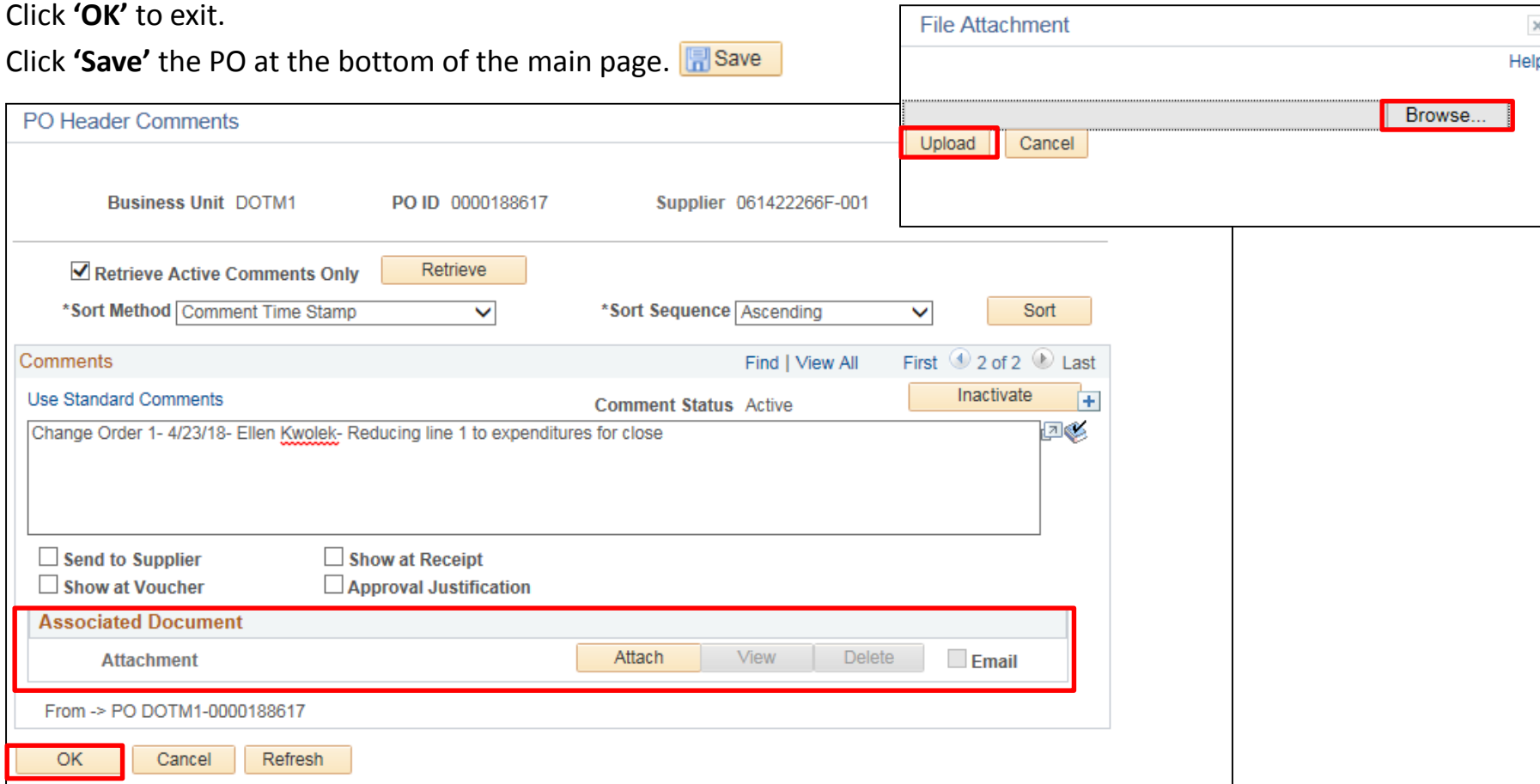
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13


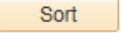
**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Add a PO Line

19. Complete the **Change Order Form** with the appropriate information.
20. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
21. Click the **'Attach'** button to attach the completed form to the change order comment. 
22. Click **'Browse'** to select the file from **Choose a File to Upload** window.
23. Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below.
24. Click **'OK'** to exit.
25. Click **'Save'** the PO at the bottom of the main page. 



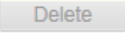


The screenshot shows the 'PO Header Comments' form with a 'File Attachment' dialog box open. The main form displays the following information:

- Business Unit:** DOTM1
- PO ID:** 0000188617
- Supplier:** 061422266F-001
- Retrieve Active Comments Only 
- *Sort Method: Comment Time Stamp 
- *Sort Sequence: Ascending

The 'Comments' section shows a single comment: 'Change Order 1- 4/23/18- Ellen Kwolek- Reducing line 1 to expenditures for close'. Below the comment are four checkboxes: 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'.

The 'Associated Document' section is highlighted with a red box and contains the following table:

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

At the bottom of the form, the 'OK' button is highlighted with a red box. The 'File Attachment' dialog box is also open, showing 'Upload', 'Cancel', and 'Browse...' buttons, with 'Browse...' highlighted in red.

PO Change Orders: Close a PO Line

26. Adjust the line amount to reflect the total expended amount.

- **Amount Based:** Enter the total line expended amount in the 'Price' field.
- **Quantity Based:** Enter the total quantity received in the 'Qty' field.

(In this example the line is Amount based and has been adjusted to \$311,066.17)

27. Click the 'Header Details' to adjust the PO Obligation, accordingly. The Obligation Amount should never exceed the Total Amount of the PO. (See next slide)

The screenshot displays a PO system interface. At the top, there is a 'Header' section with various fields: *PO Date (12/26/2017), *Supplier (060845880F-001), *Supplier ID (0000000705), *Buyer (ConroyC), and PO Reference (Grant DOT0171043GR). A 'Header Details' link is highlighted with a red box. To the right, there is an 'Amount Summary' section with a table:

Category	Amount	Unit
Merchandise	450,000.00	USD
Freight/Tax/Misc.	0.00	
Total Amount	450,000.00	
Encumbrance Balance	138,933.83	
Obligation Amount	450,000.00	

Below the header, there is a 'Lines' section with a table. The table has columns: Line, Item, Description, PO Qty, *UOM, Category, Price, Merchandise Amount, Status. The first row is highlighted, and the 'Price' field (311,066.17) is highlighted with a red box.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Grant for Project No. DOT01710430GR	1.0000	EA	81000000	311,066.17	450,000.00	Approved

PO Change Orders: Add a PO Line


28. Enter the new **PO Obligation** in the '**Obligation Amount**' field. This typically matches the PO 'Total Amount'. Your Total PO Amount should never exceed your Obligation Amount.
29. Click '**OK**'.

The screenshot shows the 'PO Header Details' form with several sections. The 'Obligation Amount' section at the bottom is highlighted with a red box, and the 'OK' button at the bottom left is also highlighted with a red box. A blue callout box with an arrow points to the 'Obligation Amount' field, containing the text: 'In this example, the Total PO Amount is now \$311,066.17.'

PO Header Details	
PO Details	
Supplier 060845880F-001	PO Date 12/26/2017
*PO Type GRT	Budget Status Valid
*Billing Location DOTM1AD	<input checked="" type="checkbox"/> Tax Exempt
Origin 945 DOT-FINFIN	ID 066000798DOT
<input type="checkbox"/> Use One Ship To	Letter of Credit ID
	Ship To 0940000032
Currency	
Currency Code USD	Base Currency USD
Rate Date 01/01/1900	Exchange Rate 1.00000000
Rate Type CRRNT	
Process Control Option	
<input checked="" type="checkbox"/> Dispatch	Acknowledgements required for Not required
*Method Print	Accounting Date 07/01/2018
	Accounting Template STANDARD
Obligation Amount	
Obligation Amount 311,066.17	
Start Date 12/26/2017	
End Date 06/30/2019	
OK	Cancel Refresh

PO Change Orders: Add a PO Line

The **Obligation Amount** will be updated, and the **Merchandise Amount** field will now reflect the adjusted dollar value.

30. Click **'Save'** at the bottom of the PO main page.  Save

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000185483
Copy From

PO Status Dispatched ✖
Budget Status Valid
 Hold From Further Processing

Header ?

*PO Date 12/26/2017 Supplier Search
*Supplier 060845880F-001 Supplier Details
*Supplier ID 0000000705 CAPITOL REGION COUNCIL OF GOVERNMENTS
*Buyer ConroyC DOT-Conroy Christine
PO Reference Grant DOT0171043GR

Doc Tot Status Valid
Backorder Status Not Backordered Create BackOrder
Receipt Status Partial
*Dispatch Method Print Dispatch

Amount Summary ?

Merchandise	311,066.17	USD
Freight/Tax/Misc.	0.00	
Total Amount	311,066.17	
Encumbrance Balance	138,933.83	
Obligation Amount	311,066.17	

Calculate

PO Obligation is now updated.

Add Items From ?

Catalog Item Search

Select Lines To Display ?

Search for Lines Line To Retrieve

Lines ?

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Grant for Project No. DOT0171043GR	1.0000	EA	81000000	311,066.1700	311,066.17	Approved

View Printable Version
View Approvals

*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

Cancel a PO Line (No Activity ONLY)

This action WILL initiate a change order



PO Change Orders: Cancel a PO Line (No Activity ONLY)

IMPORTANT: A PO LINE CAN ONLY BE CANCELED IF THERE HAS BEEN NO ACTIVITY (ZERO EXPENDITURES).

If funds have been expended against a line, you will need to close the line by reducing it to expenditures. (See **Close a PO Line instructions, if so.**)

1. Navigate to 'Add/Update POs'.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the 'Find an Existing Value' tab.

Purchase Order

Find an Existing Value | Add a New Value

Business Unit

PO ID

Find an Existing Value | Add a New Value

PO Change Orders: Cancel a PO Line (No Activity ONLY)

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼ 📅

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍

PO Type = ▼

Purchase Order Reference begins with ▼

Hold From Further Processing

Case Sensitive

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

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

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

PO Change Orders: Cancel a PO Line (No Activity ONLY)

5. Click 'Search'.
6. Click on the 'PO ID' hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

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

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

Search Criteria

Business Unit =

PO ID contains

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

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

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

Search Results

View All First 1 of 1 Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING KwolekEII DOT-Kwolek Ellen S General (blank)					N

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



PO Change Orders: Cancel a PO Line (No Activity ONLY)


- Click the change order icon (**blue triangle**)  in the top right corner of the PO.
- Expand the PO lines by clicking the arrow  at the end of tabs, indicated below.

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
 PO ID 0000188617
 Copy From

PO Status Dispatched  
 Budget Status Valid
 Hold From Further Processing


Header 

*PO Date 03/27/2018 Supplier Search
 *Supplier 061422266F-001 Supplier Details
 *Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
 *Buyer KwolekEll DOT-Kwolek Ellen S

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


PO Reference

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


Amount Summary 

Merchandise	1,369.46	USD
Freight/Tax/Misc.	0.00	
Total Amount	1,369.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	




Calculate











Add Items From 

Catalog Item Search
 Purchasing Kit

Select Lines To Display 

Search for Lines Line To Retrieve

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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving							
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status						
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved						
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved						

View Printable Version
 View Approvals

*Go to More ...

PO Change Orders: Cancel a PO Line (No Activity ONLY)

9. Click the red X icon on the line you would like to cancel. ❌

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	Due Date	Ship To	Price	Status	Backorder Status	Supplier Item ID
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved	03/27/2018	0940000117	531.00000	Approved	Not Backordered	❌
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved	03/27/2018	0940000117	838.46000	Approved	Not Backordered	❌

10. Click 'Yes' to confirm the cancelation.

Message

This action will cancel line 1 for this purchase order. Continue? (10200,229)

The action that you are taking will cancel this line for this Purchase Order. If you do not want to cancel this line, then you cannot perform the action at this time.

The Line 'Status' will then change to a status of *Canceled*, as shown below.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	Due Date	Ship To
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Canceled	03/27/2018	0940000117
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved	03/27/2018	0940000117

PO Change Orders: Cancel a PO Line (No Activity ONLY)

11. **IMPORTANT:** All CTDOT change orders must include a PO Header comment with the change order number, the date of the change, name of the user creating the change, and a brief description.

Click the 'Add Comments' link.


(NOTE: If comments already exist in the PO Header the link will display as 'Edit Comments'.)

The screenshot displays a PO system interface with the following sections:

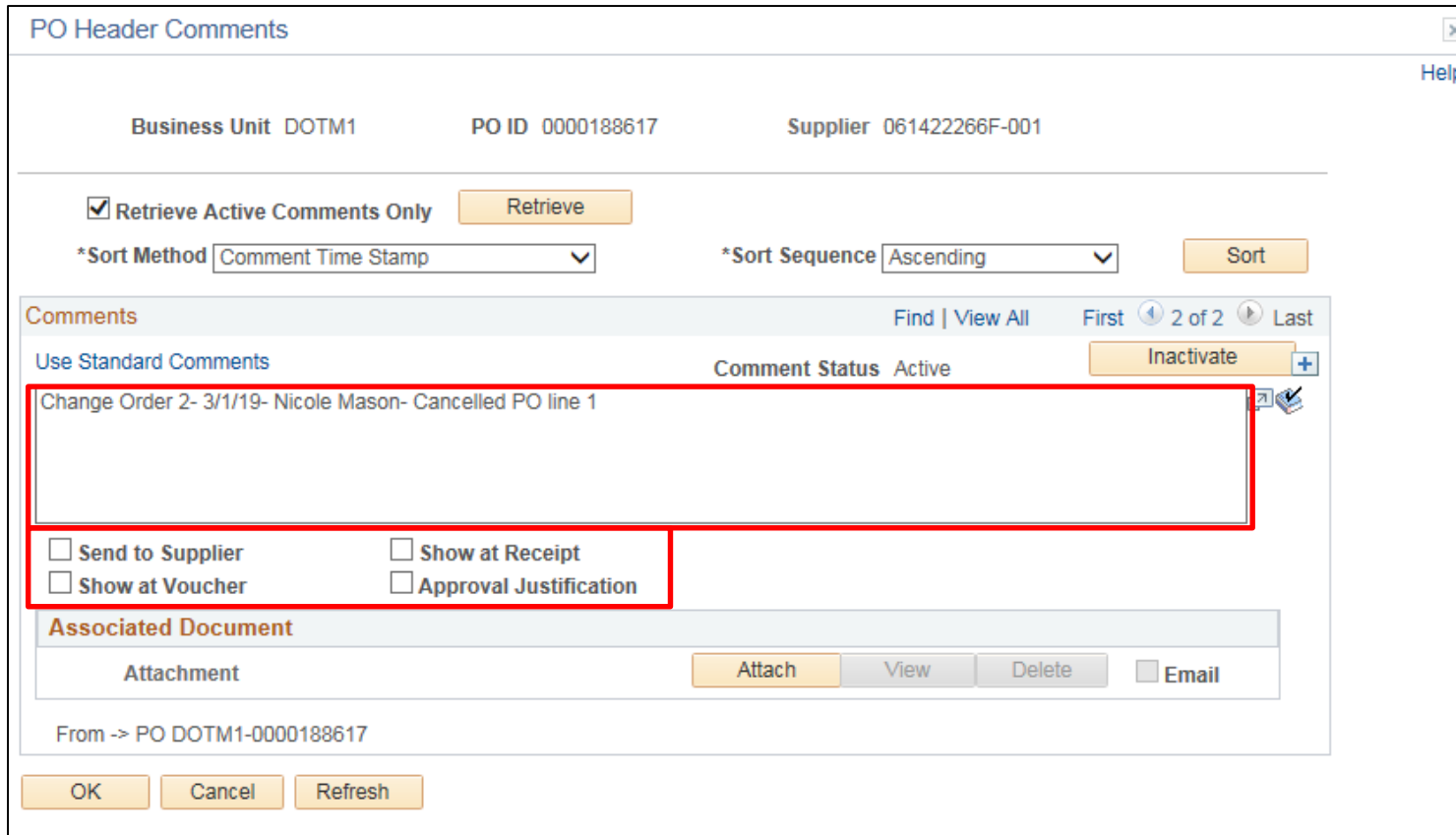
- Business Unit:** DOTM1
- PO ID:** 0000188617
- PO Status:** Dispatched
- Budget Status:** Not Chk'd
- Copy From:** [Dropdown]
- Header Section:**
 - *PO Date: 03/27/2018
 - *Supplier: 061422266F-001
 - *Supplier ID: 0000010578
 - *Buyer: KwolekEll
 - Supplier Search, Supplier Details, GRAYSTONE GROUP ADVERTISING, DOT-Kwolek Ellen S
 - Doc Tol Status: Valid
 - Backorder Status: Not Backordered
 - Receipt Status: Not Recvd
 - *Dispatch Method: Email
 - Buttons: Create BackOrder, Dispatch
- Amount Summary:**
 - Merchandise: 838.46 USD
 - Freight/Tax/Misc.: 0.00
 - Total Amount: 838.46
 - Encumbrance Balance: 1,369.46
 - Obligation Amount: 1,369.46
 - Buttons: Calculate
- Add Items From:** Catalog, Purchasing Kit, Item Search
- Select Lines To Display:** Search for Lines, Line [], To [], Retrieve
- Lines Table:**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Canceled			
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			
- Footer:** View Printable Version, View Approvals, *Go to [More ...], Save, Return to Search, Notify, Refresh, Add, Update/Display

PO Change Orders: Cancel a PO Line (No Activity ONLY)

12. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble  located on each PO line next to the **'Status'** field.
13. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification



PO Header Comments

Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001

Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate

Change Order 2- 3/1/19- Nicole Mason- Cancelled PO line 1

<input type="checkbox"/> Send to Supplier	<input type="checkbox"/> Show at Receipt
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification

Associated Document

Attachment	Attach	View	Delete	Email
------------	--------	------	--------	-------

From -> PO DOTM1-0000188617

OK Cancel Refresh

PO Change Order Form

14. **IMPORTANT:** DOT Purchasing requires that all change order comments to include a completed copy of a **Change Order Request Form**. This form is available on the DOT Intranet Site under: [Documents and Forms → Purchasing](#). You can save a copy of the template to your computer for easy access.

ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST FORM
TO BE ATTACHED TO THE HEADER COMMENT ON THE PO

Contract# or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

Description of Change: PO line 1 price reduction from 531.00 to 525.00

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

Name and Telephone # of Person submitting e-mail: Ellen Kwolek (860)594-1234

Date Submitted: 4/23/2018

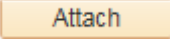
This form certifies that the appropriate approvals have been given and that proper funding is in place.

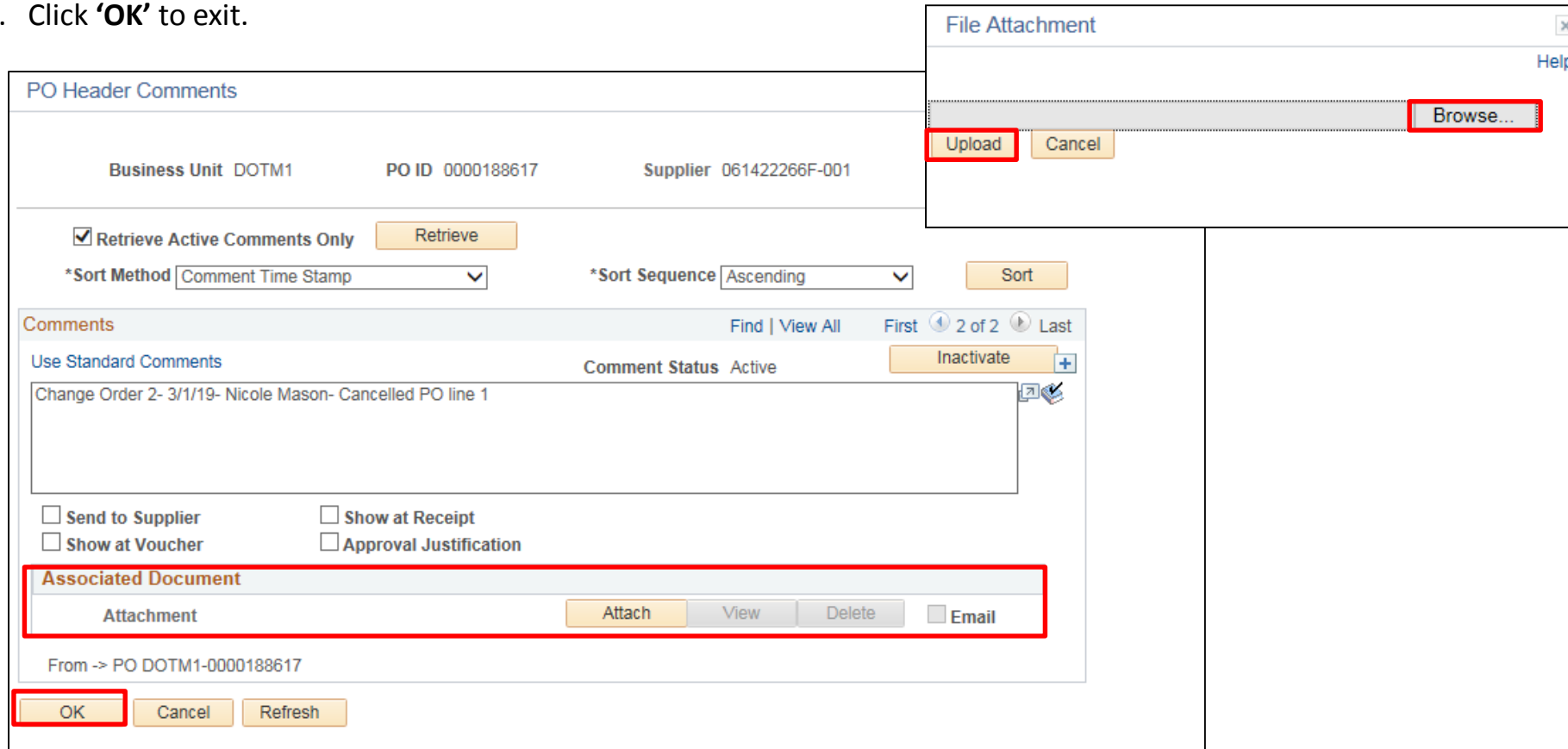
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

**Change Order
Request Form
(SAMPLE)**

PO Change Orders: Cancel a PO Line (No Activity ONLY)

15. Complete the **Change Order Form** with the appropriate information.
16. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
17. Click the **'Attach'** button to attach the completed form to the change order comment. 
18. Click **'Browse'** to select the file from **Choose a File to Upload** window.
19. Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below.
20. Click **'OK'** to exit.



The screenshot displays the 'PO Header Comments' interface. At the top, it shows 'Business Unit DOTM1', 'PO ID 0000188617', and 'Supplier 061422266F-001'. Below this, there are options to 'Retrieve Active Comments Only' and a 'Retrieve' button. The 'Sort Method' is set to 'Comment Time Stamp' and the 'Sort Sequence' is 'Ascending'. A 'Sort' button is also present.

The 'Comments' section shows a single comment: 'Change Order 2- 3/1/19- Nicole Mason- Cancelled PO line 1'. Below the comment, there are checkboxes for 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'. An 'Inactivate' button is also visible.





The 'Associated Document' section is highlighted with a red box. It contains a table with one row: 'Attachment'. To the right of the table are buttons for 'Attach', 'View', 'Delete', and an 'Email' checkbox.

A 'File Attachment' dialog box is open over the 'Associated Document' section. It has a title bar with a close button and a 'Help' link. The dialog contains a 'Browse...' button (highlighted with a red box), an 'Upload' button (highlighted with a red box), and a 'Cancel' button. The 'Upload' button is also highlighted with a red box in the main interface.

At the bottom of the main interface, there are 'OK', 'Cancel', and 'Refresh' buttons. The 'OK' button is highlighted with a red box.

PO Change Orders: Cancel a PO Line (No Activity ONLY)

21. Click the 'Header Details' to adjust the **PO Obligation**, accordingly. The Obligation Amount should never exceed the Total Amount of the PO.
(See next slide)

Business Unit DOTM1	PO ID 0000188617	PO Status Dispatched  
Copy From <input type="text"/>		Budget Status Not Chk'd
<input type="checkbox"/> Hold From Further Processing		
Header 		
*PO Date <input type="text" value="03/27/2018"/>	Supplier Search	Doc ToI Status Valid
*Supplier <input type="text" value="061422266F-001"/>	Supplier Details	Backorder Status Not Backordered Create BackOrder
*Supplier ID <input type="text" value="0000010578"/>	GRAYSTONE GROUP ADVERTISING	Receipt Status Not Recvd
*Buyer <input type="text" value="KwolekEll"/>	DOT-Kwolek Ellen S	*Dispatch Method <input type="text" value="Email"/> <input type="button" value="Dispatch"/>
PO Reference <input type="text"/>		Amount Summary 
Header Details	Activity Summary	Merchandise 838.46 USD
PO Defaults	Edit Comments	Freight/Tax/Misc. 0.00 <input type="button" value="Calculate"/>
PO Activities	Add ShipTo Comments	Total Amount 838.46
Requisitions	Document Status	Encumbrance Balance 1,369.46
▼ Actions		Obligation Amount 1,369.46

PO Change Orders: Cancel a PO Line (No Activity ONLY)

22. Enter the new **PO Obligation** in the 'Obligation Amount' field. This typically matches the PO 'Total Amount'. Your Total PO Amount should never exceed your Obligation Amount.
23. Click 'OK'.

PO Header Details

PO Details

Supplier 061422266F-001 PO Date 03/27/2018
*PO Type GEN Budget Status Not Chk'd
*Billing Location DOTM1AD Billing Address Tax Exempt
Origin 947 DOT-ENGINE ID 066000798DOT
Letter of Credit ID
Use One Ship To Ship To 0940000117

Currency

Currency Code USD Exchange Rate Detail Base Currency USD
Rate Date 03/27/2018 Exchange Rate 1.00000000
Rate Type CRRNT

Process Control Option

Dispatch Acknowledgements required for Not required
*Method Print Accounting Date 07/01/2018
Accounting Template STANDARD

Obligation Amount

Obligation Amount 838.46
Start Date 02/28/2018
End Date 06/30/2018

OK Cancel Refresh

In this example, the Total PO Amount is now \$838.46.

PO Change Orders: Cancel a PO Line (No Activity ONLY)

The **Obligation Amount** will be updated, and the **Merchandise Amount** field will now reflect the adjusted dollar value.

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617

Copy From

PO Status Dispatched ✘
Budget Status Not Chk'd
 Hold From Further Processing

Header ?

*PO Date 03/27/2018 Supplier Search
*Supplier 061422266F-001 Supplier Details
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
*Buyer KwolekEll DOT-Kwolek Ellen S

PO Reference

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

Amount Summary ?

Merchandise	838.46	USD	Calculate
Freight/Tax/Misc.	0.00		
Total Amount	838.46		
Encumbrance Balance	1,369.46		
Obligation Amount	838.46		

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

Add Items From ?

Catalog Item Search
Purchasing Kit

Select Lines To Display ?

Search for Lines Line To Retrieve

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Canceled			
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved			

View Printable Version
View Approvals

*Go to ... More ...

PO Obligation is now updated.

PO Change Orders: Cancel a PO Line (No Activity ONLY)

24. Click 'Save' on the PO main page.  Save

Header ?

*PO Date Supplier Search Doc Tol Status Valid
*Supplier Supplier Details Backorder Status Not Backordered Create BackOrder
*Supplier ID GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
*Buyer DOT-Kwolek Ellen S *Dispatch Method Dispatch
PO Reference

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

Amount Summary ?

Merchandise 838.46 USD
Freight/Tax/Misc. 0.00 Calculate
Total Amount 838.46
Encumbrance Balance 1,369.46
Obligation Amount 838.46

Add Items From ?

Catalog Item Search
Purchasing Kit







Select Lines To Display ?

Search for Lines Line To Retrieve

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Canceled				
2		To be published in the New London Day on March 7 and 21, 2018	<input type="text" value="1.0000"/>	EA	<input type="text" value="55000000"/>	<input type="text" value="838.46000"/>	838.46	Approved				

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

 Save  Return to Search  Notify  Refresh  Add  Update/Display

Cancel a PO (No Activity ONLY)

This action WILL initiate a change order



PO Change Orders: Cancel a PO (No Activity ONLY)

IMPORTANT: A PO LINE CAN ONLY BE CANCELED IF THERE HAS BEEN NO ACTIVITY (ZERO EXPENDITURES).

If funds have been expended against a line, you will need to close the line by reducing it to expenditures. (See **Close a PO Line instructions, if so.**)

1. Navigate to 'Add/Update POs'.

Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

2. Select the 'Find an Existing Value' tab.

Purchase Order

Business Unit

PO ID

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

PO Change Orders: Cancel a PO (No Activity ONLY)

3. The **'Business Unit'** field should default as *DOTM1*.

4. Enter the Purchase Order number in the **'PO ID'** field.

You also have the option to change the drop-down column **begins with** next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)

Purchase Order

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

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

▼ **Search Criteria**

Business Unit = ▼ DOTM1 🔍

PO ID begins with ▼

Purchase Order Date = ▼ 📅

PO Status = ▼

Short Supplier Name begins with ▼ 🔍

Supplier ID begins with ▼ 🔍

Supplier Name begins with ▼ 🔍

Buyer begins with ▼ 🔍

Buyer Name begins with ▼ 🔍


PO Type = ▼

Purchase Order Reference begins with ▼

Hold From Further Processing

Case Sensitive

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

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

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

↓

PO ID begins with ▼ 0000188617

PO ID contains ▼ 188617

PO Change Orders: Cancel a PO (No Activity ONLY)

5. Click 'Search'.
6. Click on the 'PO ID' hyperlink in your Search Results.
If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

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

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

Search Criteria

Business Unit =

PO ID contains

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

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

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

Search Results


View All First ◀ 1 of 1 ▶ Last

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DOTM1	0000188617	03/27/2018	Dispatched	061422266F-001	0000010578	GRAYSTONE GROUP ADVERTISING	KwolekEII	DOT-Kwolek Ellen S	General	(blank)	N

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

PO Change Orders: Cancel a PO (No Activity ONLY)



IMPORTANT: A PO CAN ONLY BE CANCELED IF THERE HAS BEEN NO PO ACTIVITY (ZERO EXPENDITURES).


- Click the red X in the top right corner of the PO main page. 

Maintain Purchase Order

Purchase Order


Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched  
Budget Status Valid
 Hold From Further Processing


Header 

*PO Date 03/27/2018 Supplier Search Doc Tol Status Valid
*Supplier 061422266F-001 Supplier Details Backorder Status Not Backordered Create BackOrder
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd
*Buyer KwolekEll DOT-Kwolek Ellen S *Dispatch Method Email Dispatch
PO Reference


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

Amount Summary 




Merchandise 1,369.46 USD
Freight/Tax/Misc. 0.00 Calculate
Total Amount 1,369.46
Encumbrance Balance 1,369.46
Obligation Amount 1,369.46











Add Items From 

Catalog Item Search
Purchasing Kit

Select Lines To Display 

Search for Lines Line To Retrieve

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Approved				
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved				

View Printable Version
View Approvals

*Go to More ...

PO Change Orders: Cancel a PO (No Activity ONLY)

- Click **'Yes'** to confirm the PO cancelation.

Message

Canceling a purchase order will commit any changes made and prevent further changes. Continue? (10200,515)

When you mark a purchase order as canceled, the system does not allow any further changes to the purchase order. Any changes made, however, will be stored on the purchase order.

The **'PO Status'** will then change to *Pending Cancel*.

- Click **'Save'** at the bottom of the PO main page. 