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)



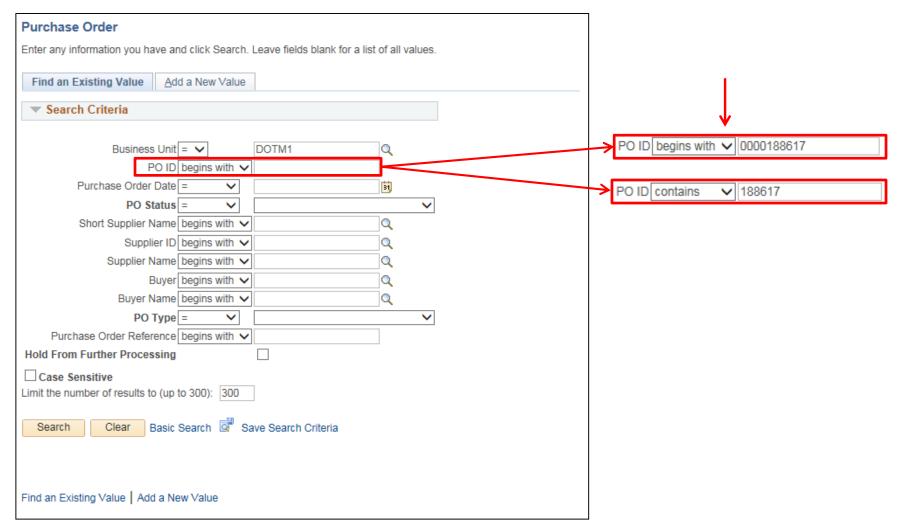
1. Navigate to 'Add/Update POs'.

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

| Purchase Order | |
|--|--|
| Find an Existing Value Add a New Value | |
| Business Unit DOTM1 | |
| Add | |
| Find an Existing Value Add a New Value | |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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 = V DOTM1 PO ID contains V 188617 Purchase Order Date = V IS PO Status = V V Short Supplier Name begins with V Q Supplier ID begins with V Q Buyer begins with V Q Buyer begins with V Q PUrchase Order Reference begins with V |
| Hold From Further Processing Case Sensitive Limit the number of results to (up to 300): 300 Search Clear Basic 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 Buver Buver 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 |

- 7. Click the change order icon (blue triangle) Δ 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)

| Purchase Order | | | | | | | | |
|--------------------------------|--|-------------|-------------------------------|-----------------|------------------------------|--------|------------|----------------|
| Business Unit DOTM1 | | | PO Status | Dispatched | Δ Χ | | | |
| PO ID 0000188617 | | | Budget Status | Valid | | | | |
| Copy From | \checkmark | | | Hold From Fur | ther Processing | | | |
| 🕶 Header 🕜 | | | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | | Doc Tol Statu | s Valid | | | | |
| | 201 | | Backorder Statu | Not Backordered | Create BackOrder | | | |
| *Supplier 061422266F-0 | Supplier Details | | Receipt Statu | s Not Dooud | | | | |
| *Supplier ID 0000010578 | GRAYSTONE GROUP ADVERT | SING | *Dispatch Metho | | Dispatch | | | |
| *Buyer KwolekEll | DOT-Kwolek Ellen S | Amount | Summary (?) | u | | | | |
| PO Reference | | Amount | | | | | | |
| Header Details PO Defaults | s Activity Summary Edit Comments | | Merchandis | | Calculate | | | |
| PO Activities | Add ShipTo Comments | | Freight/Tax/Mis Total Amou | | | | | |
| Requisitions | Document Status | | Encumbrance Balan | | | | | |
| ✓ Actions | | | Obligation Amou | nt 1,369.46 | | | | |
| Add Items From 👔 | | Select Li | nes To Display 👔 | | | | | |
| Catalog | Item Search | Search for | Lines Lin | e 🔍 To | Q Retrieve | | | |
| Purchasing Kit | t | | | | | _ | | |
| ines 🕐 | | | | Dereception | :e Find View All 🖾 🔣 | First | 1-2 of 2 | I ant |
| Details Ship To/Due Date Statu | ses Item Information Attributes RFQ | Contract Re | eceiving | reisonaliz | .e Find View Air 🖙 🎫 | riisi. | · 1-2 01 2 | U Lasi |
| ne 🔺 Item | Description | PO Qty | ▲ *UOM Category | Price | Merchandise Amount Status | | | |
| | To be published in the Hartford Courant on March 7 and 21, 2018 | ta 1.000 | 0 EA 55000000 | ₫ 531.0000 | 531.00 Approved | s o | 10 | . – |
| | To be published in the New London Day on | 1.000 | 0 EA 5500000 | Q 838.4600 | 0 838.46 Approved | | 2 | + |

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 '<u>Price</u>' and '<u>Merchandise Amount</u>' 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.

| Purcha | ase Order | | | | | | | | | | | | | | |
|---------|---------------|-------------------------------|-----------------|---|-------------|----------|----------------|--------------------------------|----------------------------|--------------------|-------------|-------|------------|---|------|
| | | DOTM | | | | | Г | DO Statua | Disastational | ΔΧ | | | | | |
| | Business Unit | 0000176424 | | | | | | PO Status (Budget Status \ | | Δ | | | | | |
| | | | | | | | | | | | | | | | |
| | Copy From | | \sim | | | | | L | Hold From Fur | ther Processing | | | | | |
| 🔻 Head | ler 🕐 | | | | | | | | | | | | | | |
| | *DO Dato | 02/22/2017 | Suppl | ier Search | | | | Doc Tol Status V | /alid | | | | | | |
| | | | Cuppi | ion obtainin | | | Ba | ckorder Status | Not Backordered | Orente F | | | | | |
| | *Supplier | 061035087F-001 | Suppl | ier Details | | | | | | Create E | lackOrder | | | | |
| | *Supplier ID | 0000010046 | TILCO | ON CONNECTICUT | T INC | | | Receipt Status F | Partial | | | | | | |
| | *Buver | SaleseM | DOT- | Salese Michael J | | | *Di | spatch Method | Print 🗸 | Dis | patch | | | | |
| | 2 | DOT0053-0177CM | | | | Am | ount Summa | ry 🕐 | | | | | | | |
| | | | | | | | | Merchandise | 1,020,203.34 | LISD | | | | | |
| | | Header Details PO Defaults | | ty Summary Comments | | | - | | | | culate | | | | |
| | | PO Activities | | ShipTo Comments | | | FI | eight/Tax/Misc. | 0.00 | | | | | | |
| | | Requisitions | | ment Status | | | F a aum | Total Amount brance Balance | 1,020,203.34 | | | | | | |
| | | Actions | | | | | | igation Amount | 984,960.62 1,020,203.34 | | | | | | |
| | | | | | | | | - | 1,020,203.34 | | | | | | |
| dd Iten | ns From 🕐 | | | | | Sele | ect Lines To I | Display 🕜 | | | | | | | |
| | | Catalog | Item S | Search | | Sear | rch for Lines | Line | Q T0 | Q Re | etrieve | | | | |
| ines 🕜 | 2 | | | | | | | | Persona | lize Find View | AIL [🛛] 🔳 | First | t 🕙 1 of 1 | | last |
| Details | Ship To/Due | Date <u>S</u> tatuses | Item Informat | tion <u>A</u> ttributes | <u>R</u> FQ | Contract | Receiving | | 1 0100110 | | | | - 1011 | | |
| ne▲ | Item | | Description | | | PC | O Qty▲ *UOM | Category | Price | Merchandise | Status | | | | |
| | | | | | | | | | | | | | | | |
| | | | | CN - D-1 - Construct idge and Safety | ction; | | 1.0000 EA | 72000000 | 1,020,203.340 | 1,020,203.34 | Approved | 0 | 2 | + | |
| | | | Improvements of | | | | | [·] | | | | V | 1-1 | | _ |
| | | | | | | | | | | | | | | | |

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 Status Budget Status | Dispatched | × | | |
| PO ID 0000188617 | | Duuget status | | | | |
| Copy From | ~ | | Hold From Further | Processing | | |
| ▼ Header (?) | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | Doc Tol Status | | | | |
| *Supplier 061422266F-001 | Supplier Details | Backorder Status | Not Backordered | Create BackOrde | er | |
| *Supplier ID 0000010578 | GRAYSTONE GROUP ADVERTISIN | | | | | |
| *Buyer KwolekEll | DOT-Kwolek Ellen S | *Dispatch Method | Email 🗸 | Dispatch | | |
| PO Reference | | Amount Summary (2) | | | | |
| Header Details | Activity Summary | Merchandise | 1,369.46 US | D | | |
| PO Defaults | Edit Comments | Freight/Tax/Misc. | . 0.00 | Calculate | | |
| PO Activities Reguisitions | Add ShipTo Comments Document Status | Total Amount | t 1,369.46 | | | |
| ✓ Actions | Document Status | Encumbrance Balance | | | | |
| | | Obligation Amount | t 1,369.46 | | | |
| Add Items From ② | | Select Lines To Display 🕐 | | | | |
| Catalog Purchasing Kit | Item Search | Search for Lines Line | Q T0 | Q Retrieve | | |
| Lines ② Details Ship To/Due Date Statuses | Item Information Attributes RFQ | Contract Receiving | Personalize Find V | /iew All 🗁 🔣 | First 🕚 | 1-2 of 2 🕑 Last |
| Line Item | Description | PO Qty *UOM Category | Price | handise Amount | | |
| 1 📑C | To be published in the C | 1.0000 EA Q 55000000 Q | 525.00 | 531.00 Approved | Q | • • • |
| 2 | To be published in the New London Day on March 7 and 21, Contract 2018 | 1.0000 EA 55000000 Q | 838.46000 | 838.46 Approved | \Diamond | <u> </u> |
| View Printable Version View Approvals | | *Go to More | | • | | |

- 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 O 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. | Send to Supplier | Show at Receipt | |
|------------------|------------------|------------------------|--|
| | Show at Voucher | 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 | Inac | tivate + | |
| Send to Supplier Show at Receipt Show at Voucher Approval Justification | | | | | |
| Associated Document | | | | | |
| Attachment | Attach | View Dele | te Er | nail | |
| From -> PO DOTM1-0000188617 | | | | | |
| OK Cancel Refresh | | | | | |

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 FO TO BE ATTACHED TO THE HEADER COMMENT ON THE PO | <u>RM</u> | |
|--|------------------------------|------|
| Contract# or GL Authorization: 12PSX0051AA Vendor Name: Graystone Group Advertising | Change C Request (SAMP | Form |
| 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 chang comments section of the change order. | e in the header | |
| Change Order Request Form Revised 04/12/13 | | |

Attach

- 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.
- Click **'OK'** to exit. 19. File Attachment × Help PO Header Comments Browse.. Upload Cancel Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001 ✓ Retrieve Active Comments Only Retrieve *Sort Method Comment Time Stamp Sort $\mathbf{\vee}$ *Sort Sequence Ascending V Comments First ④ 2 of 2 🕑 Last Find | View All Inactivate 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 20 Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Attach View Delete Email Attachment change order form PO188617.docx From -> PO DOTM1-0000188617 Cancel Refresh OK

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.

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

| Maintai | n Purchase Order | | | | | | | | | |
|----------|---|--|---------------|--------------------------|----------------------------|---------------------|------------------------------|-------|----------|------------|
| Purch | ase Order | | | | | | | | | |
| | Business Unit DOTM1 PO ID 0000188617 | | | | PO Status Budget Status | Dispatched Valid | × | | | |
| | Copy From | \checkmark | | | | Hold From Further F | Processing | | | |
| THea | ader 🕐 | | | | | | | | | |
| | *PO Date 03/27/2018 | B Supplier Search | | | Doc Tol Status | Valid | | | | |
| | *Supplier 061422266F-001 | Duranitas Dataita | | Ba | ckorder Status | Not Backordered | Create BackOrder | | | |
| | *Supplier ID 0000010578 | Supplier Details GRAYSTONE GROUP ADVE | DTISING | | Receipt Status | Not Recvd | | | | |
| | *Buyer KwolekEll | Q DOT-Kwolek Ellen S | RHOING | | ispatch Method | Print V | Dispatch | | | |
| | PO Reference | | | Amount Summa | ıry 🕐 | | | | | |
| | Header Details | Activity Summary | | l l | Merchandise | 1,363.46 USI | D | | | |
| | PO Defaults PO Activities | Edit Comments Add ShipTo Comments | | F | reight/Tax/Misc. | . 0.00 | Calculate | | | |
| | Requisitions | Document Status | | Facu | Total Amount | | | | | |
| | ✓ Actions | | | | ligation Amount | | | | | |
| Add Ite | ms From 👔 | | | Select Lines To | Display 🕐 | | | | | |
| | Catalog Purchasing Kit | Item Search | | Search for Lines | Line | Q T0 | Q Retrieve | | | |
| Lines | ? | | | | | Personalize F | ind View All 🗖 🔣 | First | 1-2 of 2 | Last |
| Details | Ship <u>T</u> o/Due Date <u>S</u> tatuses | Item Information Attributes R | FQ <u>C</u> o | ntract <u>R</u> eceiving | | | | | | |
| ine▲ | Item | Description | | PO Qty▲ *UOM | Category | Price | Merchandise Amount Status | | | |
| | | To be published in the Hartford Couran March 7 and 21, 2018 | ton ह | 1.0000 EA | 55000000 | Q 525.00000 | 525.00 Approved | Q | | . |
| 2 | | To be published in the New London Da March 7 and 21, 2018 | y on ह | 1.0000 EA | 55000000 | Q 838.46000 | 838.46 Approved | Q | 1 | + |
| View Pri | intable Version | | | *Go to | More | ~ |] | | | |
| View Ap | provals | | | | | | - | | | |
| | | | | | | | | | | |
| 🖷 Save | Return to Search | tify C Refresh | | | | | | 📑 Add | | ate/Displa |

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'**.

| PO Details | |
|--|--|
| Supplier 061422266F-001 | PO Date 03/27/2018 |
| *PO Type GEN | Budget Status Valid |
| *Billing Location DOTM1ADI C Billing Address | Tax Exempt |
| | ID 066000798D |
| Origin 947 Q DOT-ENGINE | Letter of Credit ID |
| Use One Ship To | Ship To 0940000117 |
| Currency | |
| Currency Code USD Q Exchange Rate Detail | Base Currency USD |
| Rate Date 01/01/1900 | Exchange Rate 1.00000000 |
| Rate Type CRRNT | |
| Process Control Option | |
| ☑ Dispatch | Acknowledgements required for Not required |
| *Method Print V | Accounting Date 03/27/2018 |
| | Accounting Template STANDARD |
| Obligation Amount | |
| Obligation Amount 1363.46 | |
| Start Date 02/28/2018 | In this example, the |
| End Date 06/30/2018 | new PO Total Amount |
| | is \$1,363.46 |
| | 13 9 1,5 05. 10 |

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

| Purch | nase Order | | | | | | | | | |
|---------------------|--|---|--------------|---------------------------|-----------------------------------|------------------------------|------------------------------|------------|----------|----------------|
| | | | | | | | | | | |
| | Business Unit DOTM1 PO ID 0000188617 | | | | D Status et Status | Dispatched Valid | × | | | |
| | Copy From | \checkmark | | | | Hold From Furth | er Processing | | | |
| The Heat | ader 🕐 | | | | | | | | | |
| | *PO Date 03/27/2018 | Supplier Search | | Doc To | ol Status | Valid | | | | |
| | *Supplier 061422266F-001 | Supplier Details | | Backorde | er Status | Not Backordered | Create BackOrder | | | |
| | *Supplier ID 0000010578 | GRAYSTONE GROUP ADVE | RTISING | | | Not Recvd | Disastat | | | |
| | *Buyer KwolekEll | Q DOT-Kwolek Ellen S | | *Dispatch | | Print V | Dispatch | | | |
| | PO Reference | |] | Amount Summary ② | | | | | | |
| | Header Details PO Defaults PO Activities Requisitions | Activity Summary Edit Comments Add ShipTo Comments Document Status | | Freight/1 | chandise Tax/Misc. I Amount | 1,363.46 0.00 1,363.46 | USD Calculate | _ | | |
| | ✓ Actions | Document Status | | Encumbrance Obligation | | 1,369.46 1,363.46 | < | - 1 | | igation |
| Add Ite | ems From 👔 | | | Select Lines To Displa | iy 🕐 👘 | | | | now u | pdated |
| | Catalog Purchasing Kit | Item Search | | Search for Lines | Line | Q T0 | Q Retrieve | | | |
| Lines | | | | | | Personalize | Find View All 🔄 🔣 | First | I-2 of 2 | ● Last |
| Details | Ship <u>T</u> o/Due Date Statuses | Item Information Attributes R Description | ω <u>c</u> α | PO Qty *UOM Cate | едогу | Price | Merchandise Amount Status | | | |
| 1 | | To be published in the Hartford Courant March 7 and 21, 2018 | on ह | 1.0000 EA 550 | 00000 | Q 525.00000 | 525.00 Approved | Q | 1 | + |
| 2 | F | To be published in the New London Day March 7 and 21, 2018 | on 🕰 | 1.0000 EA 550 | 00000 | Q 838.46000 | 838.46 Approved | \bigcirc | 2 | . – |
| View Pri View Ap | · | | | *Go to More | - | | > | | | ate/Display |

<u>NOTE</u>: 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.

| Purci B Cha | in Purchase C hase Order usiness Unit D PO ID O ange Order py From der (2) | 6 | - | k n orde | 'Chang eeps tr umber rs perfo he life o | ack o of ch orme | of th nan ed d | ne ge uring | - 23 | PO Status: Budget Status: | Пн | Pend Ap Not Chk old From Furth | (d | A | × | | | | |
|--------------------|--|---|---------------------|--|--|------------------------|----------------------|-----------------------------|--------------------|--|--------|--|------------|----------------|----------|-------|------------|------|-----|
| • nea | *PO Date *Supplier *Supplier ID | 03/27/2018 061422266F-001 0000010578 KwolekEll | | Supplier Se Supplier De GRAYSTO DOT-Kwole | etails | ADVERTI | SING | | | Doc Tol Status ockorder Status Receipt Status | Not I | Backordered Recvd | Cre | ate Ba Disp | ackOrder | | | | |
| | PO Reference | | | Activity Sur Edit Comm | mmary ients o Comments | | | | Fi Encum Obl | Merchandise reight/Tax/Misc Total Amoun brance Balanc ligation Amoun | t e | 1,363.46 0.00 1,363.46 1,369.46 1,363.46 | USD | Calc | ulate | | | | |
| Add Iter | | Catalog Purchasing Kit | | Item Searc | h | | | Select Line Search for L | | Display ② | | Q T0 | Q . | Ret | rieve | | | | |
| Lines (Details | | Date <u>Statuses</u> | Item I | information | Attributes | RFQ | Co | ntract <u>R</u> ece | eiving | | | Personalize | Find Vie | ew All | 🖾 🔜 | First | ④ 1-2 of 2 | ۰ La | ast |
| Line | Item | | Descript | ion | | | | PO Qty A | *UOM | Category | | Price | Mercha | ndise nount | Status | | | | |
| 1 | | | | ublished in th and 21, 201 | e Hartford Co 8 | urant on | R | 1.0000 | EA | 55000000 | ٩ | 525.00000 | 5 | 25.00 | APending | Q | 1 | ÷. | - |
| 2 | | | To be po March 7 | ublished in th and 21, 201 | e New Londo 8 | n Day on | 靍 | 1.0000 | EA | 55000000 | 9 | 838.46000 | 8 | 38.46 | APending | 0 | 1 | ÷ | - |

Modify Chartfield Coding

(This action does NOT initiate a change order)



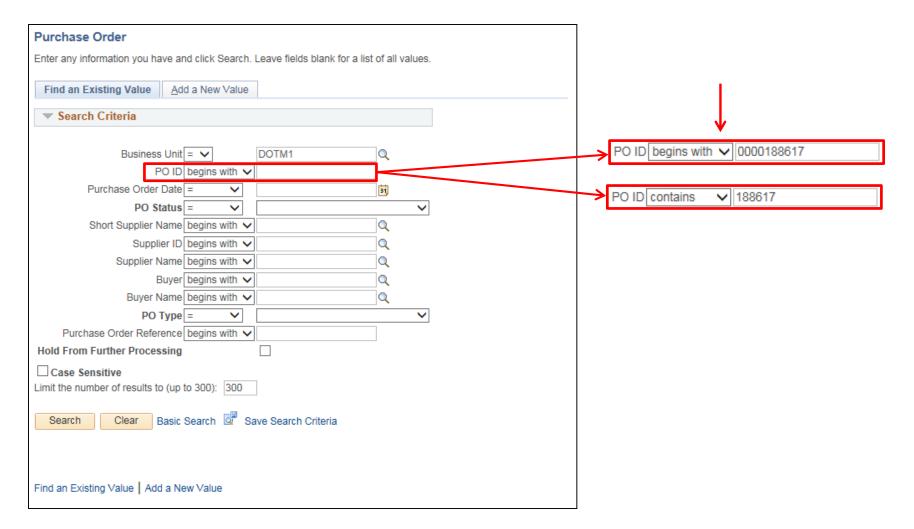
1. Navigate to 'Add/Update POs'.

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

| Purchase Order |
|--|
| Find an Existing Value Add a New Value |
| Business Unit DOTM1 Q PO ID NEXT |
| Add |
| Find an Existing Value Add a New Value |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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 v | alues. |
| Find an Existing Value Add a New Value | |
| ▼ Search Criteria | |
| Business Unit = V DOTM1 Q PO ID contains V 188617 | |
| Purchase Order Date = V | |
| PO Status = V | \checkmark |
| Short Supplier Name begins with 🗸 | |
| Supplier ID begins with 🗸 | |
| Supplier Name begins with 🗸 | |
| Buyer begins with 🗸 | |
| Buyer Name begins with 🗸 | |
| PO Type = 🗸 | \checkmark |
| Purchase Order Reference begins with V | |
| Hold From Further Processing | |
| Case Sensitive | |
| Limit the number of results to (up to 300): 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 Su | Inclier ID Supplier Name Buver Buver Name PO Type Purchase Order Reference Hold From Further Processing |
| DOTM1 0000188617 03/27/2018 Dispatched 061422266F-001 000 | 00010578 GRAYSTONE GROUP ADVERTISING KwolekEll DOT-Kwolek Ellen S General (blank) N |
| | |
| Find an Existing Value Add a New Value | |
| | |

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

| Lines | ? | | | | | | | | | | | | | Per | sonalize | Find V | iew All | 121 | | First | 1-2 | of 2 🕑 | Last |
|---------|--------|-------------------|----------|------------------|------------------------------------|------------------|---------|---------------|------------|---------|-----------|---------|------------|-----------------|----------|------------|---------|---------|---------|-------|-----------|--------|------------------|
| Details | 6 | Ship <u>T</u> o/D | ue Date | Statuses | Item Informat | on <u>A</u> ttri | butes | <u>R</u> FQ | Contr | ract | Receiving |) | | | | | | | | | | | |
| Line | | Item | | | Description | | | | | PO | Qty *UOM | Categor | ry | | Price | Merch A | andise | Status | 3 | | | | |
| 1 | 1 | | | | To be published March 7 and 21, | | ford Co | ourant on | E | 1.0 | 0000 EA | 550000 | 000 Q | 53 | 1.00000 | | 531.00 | Appro | ved | 0 | 2 | Β | . . – |
| 2 | 1 | | | | To be published March 7 and 21, | | Londo | n Day on | R | 1.0 | 0000 EA | 550000 | 000 Q | 83 | 3.46000 | | 838.46 | Appro | ved | Q | 12 | | H |
| | | D | | 1 | | | | | | | | | | | | | | | | | | | _ |
| | | in Purch | ase O | rder | | | | | | | | | | | | | | | | | • | | |
| Sc | hee | dules | | | | | | | | | | | | | | | | | | | | | |
| | | Unit DO | TM1 | | | | | Supplie | er 061 | 422266 | SE-001 | | | | | PO Sta | tus [| Dispate | ched | | | | |
| | | | | 7 | | | | | | | | | | | | | | Jopan | , and a | | | | |
| | Р | O ID 000 | 018801 | 1 | | | | PO Dat | le 03/2 | 2//2018 | 5 | | | | | | | | | | | | |
| | | | _ | | | | | | | | | | | | | | | | | | | | |
| Ret | urn te | o Main Pa | ge | | | | | | | | | | | | _ | | | | | | | | |
| Li | nes | | | | | | | | | | | | | | | Find | View | All | Firs | t 🕙 2 | of 2 🕑 | Last | |
| L | ine | 2 | Iten | ı | | To be put | blished | d in the N | lew Lor | n | | F | PO Qty | | 1.000 | 0 EA N | ercha | ndise | Amt | | 838.46 | USD | |
| | Sche | edules | | | | | | | | | | | Personaliz | ze Fin | d View | v All 🗖 | | F | First (| 1 of | 1 🕑 L | ast | |
| | Deta | nils <u>S</u> | atuses | S <u>h</u> ipmer | t <u>M</u> atching | Recei | ving | <u>Freigh</u> | t <u>R</u> | TV | | | | | | | | | | | | | |
| s | hed | | *Due | Date | *Ship To | | | | *PO | Qty | | Price | Mercha | andise mount | Status | | | | | | | | |
| 1 | | Ę | B 03/27 | 7/2018 | 0940000 | 117 | - | | 1.0 | 0000 | 838.4 | 6000 | 8 | 838.46 | Active | q | ۵ 🕯 | 6 | ò | R | + | - | |
| Add | Chie | pTo Com | nonte | | | | | | | | | | | | | | | | | | | | - |
| | | | | | | - | _ | | | | | | | | | | _ | | _ | _ | | | |
| | Save | 9 💽 F | eturn to | Search | Notify | Refresh | 1 | | | | | | | | | | L | , Add | ji i | Upd | ate/Displ | ay | |

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.

| Distrib | utions for Scl | hedule 1 | | | | | | | | | | | | | | |
|---------|-----------------------|-------------------|---------|---------------------|------------------|----------------|-------------|---------|---------------|---------|------------|---------------|---------------|---------|-----------|----|
| | | | | | | | | | | | | | | | | Н |
| | | Unit DOTM1 | | Supp | lier 06142 | 22266F-0 | D1 | | | | | | | | | |
| | F | PO ID 0000188617 | | 1 | tem | | | | To be publish | ned in | the New L | ondon Day o | n March 7 and | 21, 201 | 8 | |
| | | Line 2 | | | | | | | | | | | | | | |
| | Sche | edule 1 | | Sta | itus Active | е | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | *Distribut | te By Quantity | ~ | | | | | | | | | dula Otu | | | | |
| | Diodiba | co by country | • | | | | | | | | | chedule Qty | | 0000 | | |
| | _ | | | | | | | | | | Merchand | lise Amount | 83 | 8.46 L | JSD | |
| | Speed | Chart | 0 | Multi-SpeedCha | irts | | | | | | Doc. B | ase Amount | 83 | 8.46 U | JSD | |
| Distril | bution | | | | | | | | Personali | ize F | ind Viev | w Ali 🖾 🚦 | 🖌 🛛 First 🤇 |) 1-2 c | of 2 🕑 La | st |
| Chart | fields <u>D</u> etail | Is/Tax Asset Info | rmation | <u>R</u> eq Detail | <u>S</u> tatuses | <u>B</u> udget | Information | | | | | | | | | |
| Dist | Status | Percent | PO Qty | Merchandis Amoun | e Currency | * | GL Unit | Fund | Dept | | SID | Program | *Account | | Bud Ref | |
| I | Canceled | | | | USD | 5 | STATE | 13033 | DOT57195 | | 41393 | 34001 | 51510 | | | |
| 2 | Open | 100.0000 | 1.0000 | 838.4 | 6 USD | | STATE 🔍 | 13033 Q | DOT57195 | Q | 4139 Q | 34001 | Q 51510 | Q | | |
| | | | < | | | | | | | | | | | -> |) | ۶. |
| OK | Cance | Refresh | | | | | | | | | | | | | | |

Modify a Contract

This action WILL initiate a change order



1. Navigate to 'Add/Update POs'.

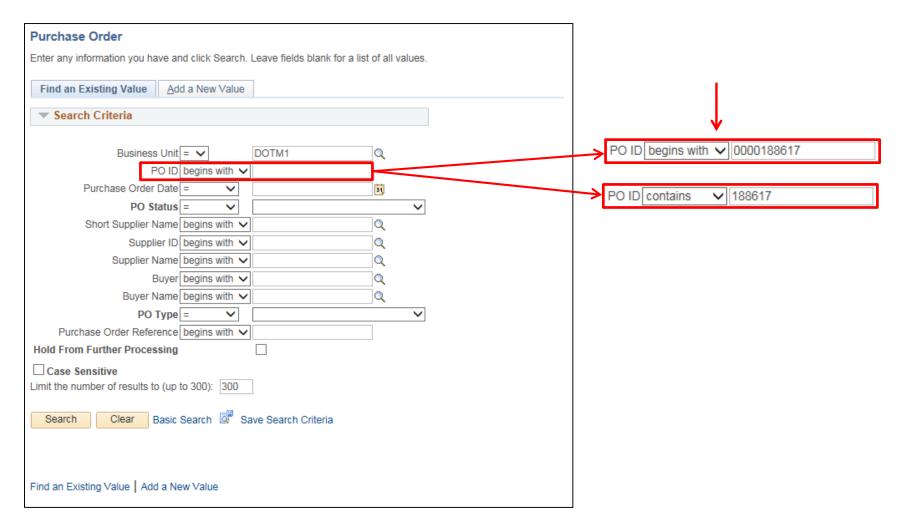
Main Menu 👻 > Core-CT Financials 🕶 > Purchasing 👻 > Purchase Orders 💌 > Add/Update POs

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

| Purchase Order |
|--|
| Find an Existing Value Add a New Value |
| Business Unit DOTM1 Q PO ID NEXT |
| Find an Existing Value Add a New Value |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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 = V DOTM1 Q |
| PO ID contains V 188617 |
| Purchase Order Date = V |
| PO Status = V |
| Short Supplier Name begins with 🗸 |
| Supplier ID begins with 🗸 |
| Supplier Name begins with 🗸 |
| Buyer begins with 🗸 |
| Buyer Name begins with V |
| PO Type = V |
| Purchase Order Reference begins with V |
| Hold From Further Processing |
| Case Sensitive |
| Limit the number of results to (up to 300): 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 |

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

| Maintain Purchase Order | | | | | | | | | | |
|---|--|----------|--------------------------|-----------|-----------------|---------------------|-------------|-------|----------|------|
| Purchase Order | | | | | | | | | | |
| Business Unit DOTM1 | | | P | O Status | Dispatched | ΔΧ | | | | |
| PO ID 0000188617 | | | Budge | et Status | Valid | | | | | |
| Copy From | \checkmark | | | | Hold From Fur | ther Processing | | | | |
| Theader 👔 | | | | | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | | Doc T | ol Status | Valid | | | | | |
| *Supplier 061422266F-001 | Question Date its | | Backorde | er Status | Not Backordered | Create | BackOrder | | | |
| *Supplier ID 0000010578 | Supplier Details | | Recei | pt Status | Not Recvd | | | | | |
| *Buyer KwolekEll | GRAYSTONE GROUP ADVERTI | SING | *Dispatc | h Method | Email 🗸 | Di | spatch | | | |
| PO Reference | DOT-INVOICE Ellert S | | Amount Summary (? | | | | | | | |
| Header Details | Activity Summary | | Mer | chandise | 1,369.46 | USD | | | | |
| PO Defaults | Edit Comments | | | Tax/Misc. | | 0 | alculate | | | |
| PO Activities | Add ShipTo Comments | | Tota | I Amount | t 1,369.46 | i | | | | |
| Requisitions | Document Status | | Encumbranc | | | i | | | | |
| - Actions | | | Obligatio | n Amoun | t 1,369.46 |) | | | | |
| Add Items From 🕜 | | | Select Lines To Displa | iy 🕐 🛛 | | | | | | |
| Catalog | Item Search | | Search for Lines | Line | Q To | Q R | etrieve | | | |
| Purchasing Kit | | | | | | | | | | |
| Lines 🕐 | | | | | Personali | ze Find View A | u 💷 🔣 | First | 1-2 of 2 | Last |
| Details Ship To/Due Date Statuses | Item Information Attributes RFQ | Con | ntract <u>R</u> eceiving |) | | | | | | |
| Line Item | Description | | PO Qty * UOM Cat | egory | Price | Merchandis Amour | nt Status | | | |
| | To be published in the Hartford Courant on March 7 and 21, 2018 | E | 1.0000 EA 55 | 000000 | Q 531.0000 | 0 531.0 | 0 Approved | Q | 2 | + |
| | To be published in the New London Day on March 7 and 21, 2018 | ₿, | 1.0000 EA 55 | 000000 | Q 838.4600 | 0 838.4 | 46 Approved | Q | | + |
| View Printable Version | | | *Go to More | | | ~ | | | | |
| View Approvals | | | More | | | v | | | | |

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

| Details for Line 1 | | | | | | × | | |
|-----------------------------------|-----------------------------|-------------------------|------------------------|------------------|----------------------------|------------|------------------|---|
| | | | | | | Help | | |
| PO ID 0000188617 | | Supplier 061422266F-001 | | | | | | |
| Line 1 | | Item ID | To be publishe 2018 | ed in the Hartfo | ord Courant on March 7 and | 121, | | |
| Line Details | | | | | | | | |
| Category | 55000000 | | Line Statu | s Approved | × 🛆 | | | |
| Description | Published Products | | Backorder Statu | s Not | | | | |
| | | | | Backordered | | | | |
| Category ID | | | Amount Summary | 7 | Contract | | | |
| Amount to Receive | 531.000 US | D | Merchandise Amou | a 531.00 | | Contrac | t SetID STATE | |
| Quantity to Receive | 1.0000 | | Doc Base An | nt 531.00 | | | tract ID | Q |
| | | | | | | Contract \ | | |
| Transaction Item Description | | | | | | | ict Line | |
| To be published in the Hartford C | ourant on March 7 and 21, 2 | 018 | | | Catao | | | |
| | | | | | Categ | ory Line N | Number | |
| Preferred Language Item Descri | ption | | | | | Gi | roup ID | |
| | | | | | | | Contract Details | - |
| Expand All Collapse A | | | | | | Milesto | ne Line | |
| Item Information | | | | | | R | Release NEXT | |
| Attributes | | | | | | Re | bate ID | Q |
| ▶ RFQ | | | | | | | | |
| Contract | | | | | | | | |
| Receiving | | | | | | | | |
| - | | | | | | | | |
| State of CT Custom Field | s | | | | | | | |
| Purchasing Author | ority GL71d 🗸 | | | | | | | |

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 Or | der | | | | | | | | | | | | | | | |
|--------------------------|---------------|-------------------------------|--------------|---------------------------|------------|------|---------|-----------|--------|------------|---------------|-------------|--------------------|---------------|------------|----------|----------|
| Purcha | ase Order | | | | | | | | | | | | | | | | |
| | Business Unit | DOTM1 | | | | | | | | PC | Status | Dispatched | | × | | | |
| | PO ID | 0000188617 | | | | | | | | Budge | t Status | Valid | | | | | |
| | Copy From | | \checkmark | | | | | | | | | Hold From | n Further Proc | essing | | | |
| Thea | der 🕐 | | | | | | | | | | | | | | | | |
| | *PO Date | 03/27/2018 | 31 | Supplier Se | arch | | | | | Doc To | ol Status | Valid | | | | | |
| | *C | 061422266F-001 | | | | | | | | Backorde | r Status | Not Backord | ered | Create BackOr | der | | |
| | | | | Supplier De | | | | | | Receir | t Statue | Not Recvd | | | | | |
| | | 0000010578 | | | NE GROUP A | DVER | RTISING | | | *Dispatch | | | ~ | Dispatch | | | |
| | - | KwolekEll | Q | DOT-Kwole | k Ellen S | | Δ | mount | | mary ? | mounou | · | | | _ | | |
| | PO Reference | | | | | | | linount | oum | | h a se di a s | | 20.40 UOD | | | | |
| | | Header Details PO Defaults | ſ | Activity Sun Edit Comm | | | | | | | handise | | 69.46 USD 0.00 | Calculate | | | |
| | | PO Activities | L | | Comments | | | | | Freight/1 | Amount | | 0.00 69.46 | | | | |
| | | Requisitions | | Document \$ | Status | | | | Enc | umbrance | | | 69.46 | | | | |
| | | Actions | | | | | | | | Obligation | | | 69.46 | | | | |
| Add Iter | ns From 👔 | | | | | | Se | elect Lir | ies T | Fo Displa | 1 2 | | | | | | |
| | | Catalog | | Item Search | 1 | | | earch for | | | Line | | [0 Q | Retrieve | | | |
| | | Purchasing Kit | | | | | | | | | LIIIG | | ч Ц | | | | |
| | | | | | | | | | | | | | | | | | |
| Lines (| 1 | Data Otatura | | 5 | | DE | | | | | | Personalize | Find View A | AII 🖾 🔡 | First | I-2 of 2 | 2 🕑 Last |
| Details | Ship To/Due | Date <u>S</u> tatuses | I Item In | nformation | Attributes | RFC | | | ceivin | ng 📰 | | | Marabandia | | | | |
| Line | Item | | Descript | ion | | | PO Qt | y *UOM | C | Category | | Price | Merchandis Amou | nt Status | | | |
| 1 | | Q | To be p | ublished in t | he 🗘 🗷 | E, | 1.000 | 0 EA | Q | 55000000 | Q | 531.00000 | 531.0 | 00 Approved | \bigcirc | 2 | + |
| | | | To be n | ublished in th | e New | | | | | | | | | | | | |
| 2 | | | | Day on Marc | | E, | 1.000 | 0 EA | 5 | 55000000 | Q [| 838.46000 | 838.4 | 46 Approved | Q | 2 | + |
| View Prin | table Version | | | | | | | *0 | o to l | Maar | | | | | | | |
| View App | provals | | | | | | | ~G | | More | | | ~ | | | | |
| de la construction de la | | | | | | | | | | | | | | | | | |

- 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 O 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. | Send to Supplier | Show at Receipt |
|------------------|------------------|------------------------|
| | Show at Voucher | Approval Justification |

| PO Header Comments | | | | |
|--|---|--------------------------|---------------|-------------|
| Business Unit DOTM1 P | OID 0000188617 | Supplier 061422266F- | 001 | |
| Retrieve Active Comments Only *Sort Method Comment Time Stamp | Retrieve | *Sort Sequence Ascending | ~ | Sort |
| comments | | Find View | All First 🕙 2 | of 2 🕑 Last |
| les Observed Ossessed | | Comment Status Active | Inact | tivate 🕂 |
| | | | | Dø |
| | ed contract on PO line 1 to at Receipt | | | |
| Change Order 1- 4/23/18- Ellen Kwolek- Change | ed contract on PO line 1 to | | | |
| Change Order 1- 4/23/18- Ellen Kwolek- Change | ed contract on PO line 1 to at Receipt | 0 12PSX0051AA | Delete | |
| Change Order 1- 4/23/18- Ellen Kwolek- Change Send to Supplier Show at Voucher Associated Document | ed contract on PO line 1 to at Receipt | 0 12PSX0051AA | Delete Em | |

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 FOR TO BE ATTACHED TO THE HEADER COMMENT ON THE PO | <u>RM</u> | | |
|--|---------------------|----------|--|
| Contract# or GL Authorization: 12PSX0051AA | Change Order | | |
| Vendor Name: Graystone Group Advertising | Request Form | | |
| PO #: 0000188617 | (SAMP | (SAMPLE) | |
| 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 comments section of the change order. | in the header | | |
| Change Order Request Form Revised 04/12/13 | | | |

Attach

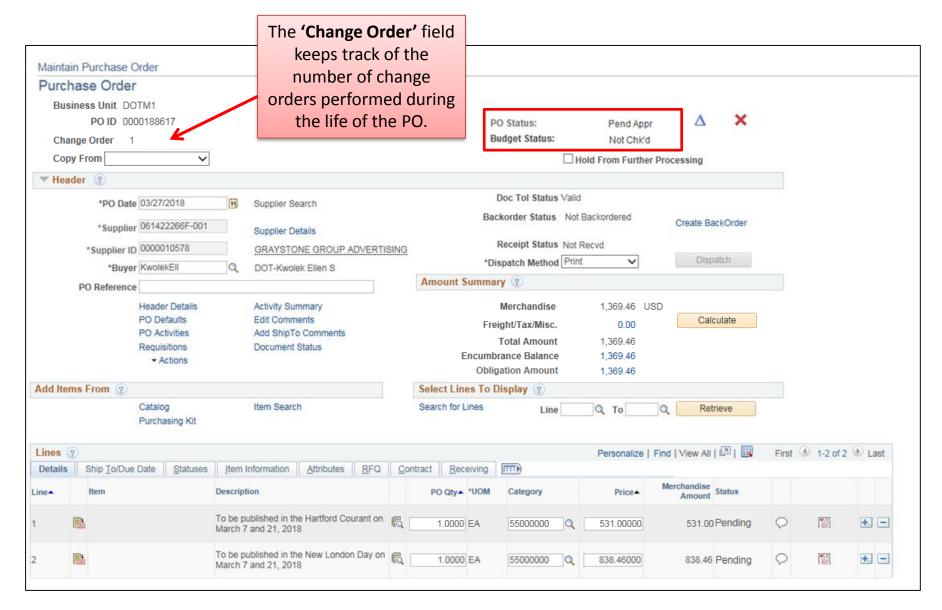
File Attachment

- 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.

| Click Save the PO at the bottom of the main page. | |
|---|---------------|
| | Help |
| PO Header Comments | Browse |
| Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001 | Upload Cancel |
| Retrieve Active Comments Only Retrieve *Sort Method Comment Time Stamp | |
| Comments Find View All First ④ 2 of 2 ④ Last | |
| Use Standard Comments Comment Status Active Inactivate + | |
| 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 change_order_form_PO188617.docx Attach View Delete Email | |
| From -> PO DOTM1-0000188617 | |
| OK Cancel Refresh | |

×

<u>NOTE</u>: 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.



Modify Unit of Measure

This action WILL initiate a change order



PO Change Orders: Modify Unit of Measure

1. Navigate to 'Add/Update POs'.

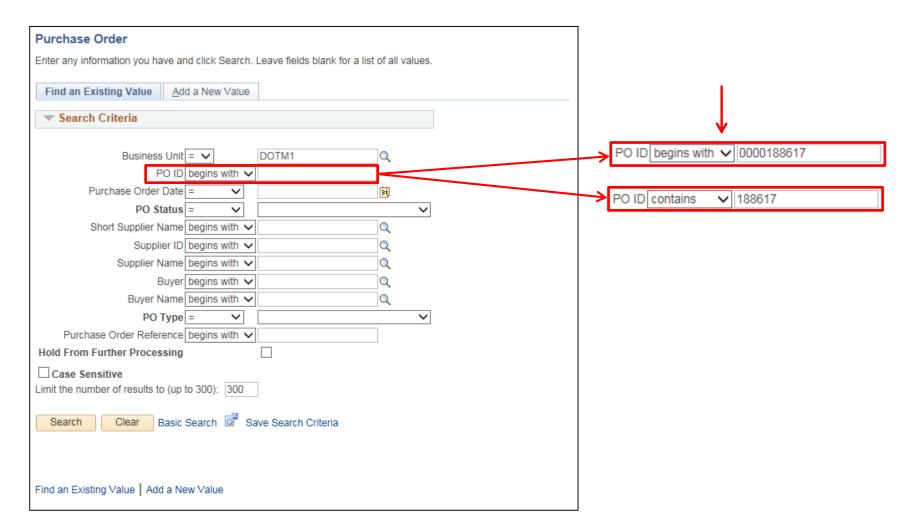
2. Select the **'Find an Existing Value'** tab.

| Purchase Order |
|--|
| Find an Existing Value Add a New Value |
| Business Unit DOTM1 Q PO ID NEXT |
| Add |
| 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



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 = V DOTM1 Q |
| PO ID contains V 188617 |
| Purchase Order Date = V |
| PO Status = V |
| Short Supplier Name begins with V |
| Supplier ID begins with 🗸 |
| Supplier Name begins with 🗸 |
| Buyer begins with 🗸 |
| Buyer Name begins with 🗸 |
| PO Type = V |
| Purchase Order Reference begins with V |
| Hold From Further Processing |
| Case Sensitive |
| Limit the number of results to (up to 300): 300 |
| Search Clear Basic 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 |

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

| aintain Purchase Order | | | | | | | | | |
|-----------------------------------|--|--------------------|----------------------|-----------------|-----------------------|----------|------------|----------|----------|
| urchase Order | | | | | | | | | |
| Business Unit DOTM1 | | | PO Status Dis | patched | ΔΧ | | | | |
| PO ID 0000188617 | | 1 | Budget Status Vali | d | | | | | |
| Copy From | ~ | | | Hold From Furth | er Processing | | | | |
| ▼ Header 🕜 | | | | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | | Doc Tol Status Valio | t | | | | | |
| *Supplier 061422266F-001 | | Bac | korder Status Not | Backordered | Create Ba | ackOrder | | | |
| | Supplier Details | | Receipt Status Not | Recvd | | | | | |
| *Supplier ID 0000010578 | GRAYSTONE GROUP ADVERTIS | SING | spatch Method Em | | Disp | atch | | | |
| *Buyer KwolekEll | DOT-Kwolek Ellen S | Amount Summa | | | | | | | |
| PO Reference | | | Merchandise | 1,369.46 | | | | | |
| Header Details PO Defaults | Activity Summary Edit Comments | Fr | eight/Tax/Misc. | 0.00 | | ulate | | | |
| PO Activities | Add ShipTo Comments | | Total Amount | 1,369.46 | | | | | |
| Requisitions | Document Status | Encum | brance Balance | 1,369.46 | | | | | |
| * Actions | | Obli | gation Amount | 1,369.46 | | | | | |
| dd Items From 👔 | | Select Lines To E |)isplay 🕐 | | | | | | |
| Catalog | Item Search | Search for Lines | Line | Q To | Q Ret | trieve | | | |
| Purchasing Kit | | | | | | | | | |
| ines 👔 | | | | Personalize | Find View All | 121 🔜 | First (| 1-2 of 2 | 🕑 Last |
| Details Ship To/Due Date Statuses | Item Information <u>Attributes</u> <u>R</u> FQ | Contract Receiving | | | | | | | |
| ne - Item | Description | PO Qty▲ *UOM | Category | Price | Merchandise Amount | | | | |
| | To be published in the Hartford Courant on March 7 and 21, 2018 | 🖏 1.0000 HR | 5500000 | 531.00000 | 531.00 | Approved | \bigcirc | 1 | + |
| | To be published in the New London Day on March 7 and 21, 2018 | 🖏 1.0000 EA | 5500000 Q | 838.46000 | 838.46 | Approved | \bigcirc | 2 | + |
| /iew Printable Version | | | | | | | | | |

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

| Details for Line 1 | | | | 3 |
|---------------------|--------------------|----------------------|---|-----|
| | | | | Hel |
| PO ID 0000188617 | | Supplier 061422266F- | 001 | |
| Line 1 | | Item ID | To be published in the Hartford Courant on March 7 and 21 2018 | 1, |
| Line Details | | | | |
| Category 5 | 55000000 | | Line Status Approved 🗙 🛆 | |
| Description F | Published Products | | Backorder Status Not Backordered | |
| Category ID (| 00042 | | Amount Summary | |
| Amount to Receive 5 | 531.000 | USD | Merchandise Amount 531.00 USD | |
| Quantity to Receive | 1.0000 | | Doc. Base Amt 531.00 USD | |
| | | | | |

| | | | | | | | | | | | | _ | | | \sim |
|---------|------------------------------|------------------|---|------------|-------------|------------------|-------|----------|-----|-------------|-----------------------|----------|------------|----------|--------------|
| Lines | ? | | | | | | | | | Personalize | Find View All | 🖾 🚟 | First 🤇 | 1-2 of 2 | Last |
| Details | s Ship <u>T</u> o/Due Date | <u>S</u> tatuses | Item Information | Attributes | <u>R</u> FQ | <u>C</u> ontract | Recei | iving 💷 | | | | | | | |
| Line | Item | | Description | | | PO Qty | *UOM | Category | | Price | Merchandise Amount | Status | | | |
| 1 | | Q | To be published in the | he 🗘 🗷 | R | 1.0000 | EA Q | 55000000 | Q | 531.00000 | 531.00 | Approved | \bigcirc | 2 | + |
| 2 | | | To be published in th London Day on Marc 2018 | | E | 1.0000 | EA | 55000000 | Q [| 838.46000 | 838.46 | Approved | 0 | 1 | + . – |
| | rintable Version pprovals | | | | | | *G01 | to More | | | ~ | | | | |
| 🔚 Save | e 🔯 Return to Search | ► Noti | fy C Refresh | | | | | | | | | | 📑 Add | ළ Upda | te/Display |

IMPORTANT NOTE

If you receive the error message below please contact DOT Core Support at <u>DOTCore.Support@ct.gov</u>. 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 |

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 | n Purchase Ore | der | | | | | | | | | | | | | | |
|-----------|----------------|-------------------------------|----------------|-----------------------------------|------------|------|--------------------|--------------|------------|-----------|--------------|----------------------|--------------|------------|----------|------------|
| Purcha | ase Order | | | | | | | | | | | | | | | |
| | Business Unit | DOTM1 | | | | | | | P | O Status | Dispatched | Δ | × | | | |
| | PO ID | 0000188617 | | | | | | | Budge | et Status | Valid | | | | | |
| | Copy From | | ~ | | | | | | | | Hold Fron | n Further Proce | essing | | | |
| Thea Hea | ider 🕜 | | | | | | | | | | | | | | | |
| | *PO Date | 03/27/2018 | | Supplier Se | arch | | | | Doc T | ol Status | Valid | | | | | |
| | *Supplior | 061422266F-00 | 1 | | | | | | Backorde | er Status | Not Backorde | ered (| Create BackO | rder | | |
| | | | | Supplier De | | | | | Recei | pt Status | Not Recvd | | | | | |
| | *Supplier ID | | | ••••• | NE GROUP A | DVER | TISING | | *Dispatc | | | ~ | Dispatch | | | |
| | | KwolekEll | | DOT-Kwole | K Ellen S | | A | nount Su | mmary 🕐 | | - | | | | | |
| | PO Reference | | | Activity Sur | | | | | | chandise | 1.26 | 69.46 USD | | | | |
| | | Header Details PO Defaults | 1 | Edit Comm | | | | | | Tax/Misc | , | 0.00 | Calculate | 9 | | |
| | | PO Activities | | | Comments | | | | - | I Amoun | | 69.46 | | | | |
| | | Requisitions ▼ Actions | | Document \$ | Status | | | E | ncumbranc | e Balanco | e 1,36 | 69.46 | | | | |
| | | * Actions | | | | | | | Obligation | n Amoun | it 1,36 | 69.46 | | | | |
| Add Iter | ms From 👔 | | | | | | Se | lect Lines | To Displa | iy 👔 | | | | | | |
| | | Catalog | | Item Search | ı | | Se | arch for Lin | es | Line | еQ т | ГоQ | Retrieve | • | | |
| | | Purchasing Kit | | | | | | | | | | | | | | |
| Lines (| 2 | | | | | | | | | | Personalize | Find View A | | Firet | 1-2 of 2 | ● Last |
| Details | | Date <u>S</u> tatuse | s <u>I</u> tem | Information | Attributes | RFC | Q <u>C</u> ontract | Recei | /ing 💷 |) | 1 croondii2c | T THUT VIEW / | | THOU | 0 12012 | C Last |
| Line | Item | | Descri | iption | | | PO Qty | *UOM | Category | | Price | Merchandise Amoun | t Status | | | |
| 1 | | | C To be | e published in t | he 🗘 🗷 | E, | 1.0000 | EA Q | 55000000 | Q | 531.00000 | 531.0 | 0 Approved | \bigcirc | 2 | + |
| 2 | | | | published in th on Day on Marc | | ₿Ę, | 1.0000 | EA | 55000000 | | 838.46000 | 838.4 | 6 Approved | Q | P | . – |
| View Prir | ntable Version | | | | | | | *Go t | o More | | | ~ | | | | |
| View App | provals | | | | | | | | | | | | | | | |

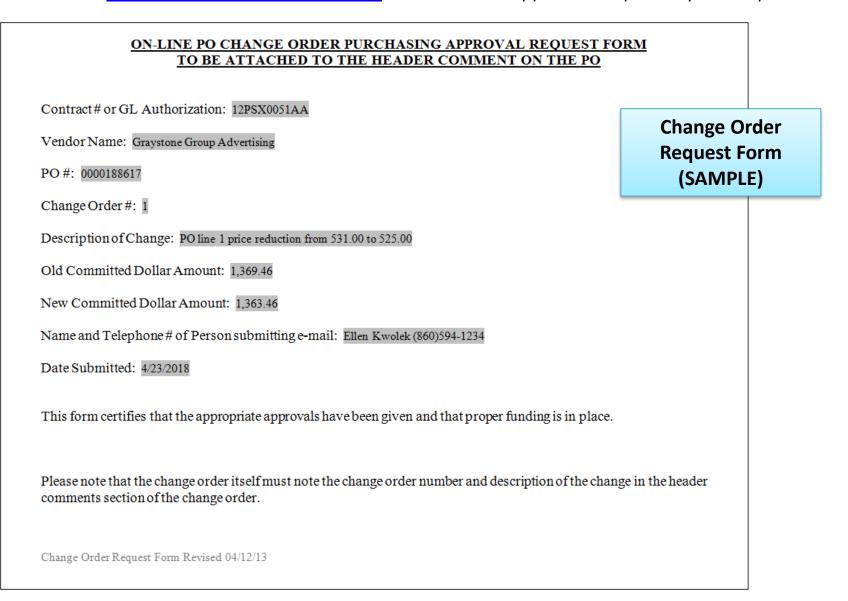
- 13. Enter the change order comment in the 'Comments' box shown below– Include further details, if necessary.
 Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble O located on each PO line next to the 'Status' field.
- 14. The checkboxes (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. | Send to Supplier | Show at Receipt |
|------------------|------------------|------------------------|
| | Show at Voucher | Approval Justification |

| Business Unit DOTM1 | PO ID 0000188617 | Supplier | 061422266F-001 | | | |
|--|---|---------------------------------------|---------------------|-------|------------|---------|
| Retrieve Active Comments Only | Retrieve | | | | | |
| *Sort Method Comment Time Stamp | ~ | *Sort Sequence | Ascending | ~ | 9 | Sort |
| Comments | | | Find View All | First | ④ 2 of 2 | Last |
| Use Standard Comments | | | | | Inactivate | |
| Change Order 1- 4/23/18- Ellen Kwolek- Ch | ange PO line 1 unit of mea | Comment Status asure from HR to EA | Active | | Inactivate | - 2¢ |
| Change Order 1- 4/23/18- Ellen Kwolek- Ch | ange PO line 1 unit of mea now at Receipt oproval Justification | | Active | | Induvate | |
| Change Order 1- 4/23/18- Ellen Kwolek- Ch | low at Receipt | | Active | | Inacuvate | |
| Change Order 1- 4/23/18- Ellen Kwolek- Ch | low at Receipt | | Active View Dele | te | Email | |
| Change Order 1- 4/23/18- Ellen Kwolek- Ch Send to Supplier Sh Show at Voucher Ap Associated Document | low at Receipt | asure from HR to EA | | te | | |

PO Change Order Form

15. IMPORTANT: <u>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: <u>Documents and Forms</u> → Purchasing. You can save a copy of the template to your computer for easy access.</u>



File Attachment

- 16. Complete the **Change Order Form** with the appropriate information.
- 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. Attach 18.
- 19. Click 'Browse' to select the file from Choose a File to Upload window.
- Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below. 20.
- Click **'OK'** to exit. 21.
- 22.

| Click 'Save' the PO at the bottom of the main | page. 🔚 Save | | Help |
|---|--------------------------------|---------------|--------|
| PO Header Comments | | Upload Cancel | Browse |
| 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 Inactive | te + | |
| Change Order 1- 4/23/18- Ellen Kwolek- Change PO line 1 unit of mea | sure from HR to EA | | |
| Send to Supplier Show at Receipt Show at Voucher Approval Justification | | | |
| Associated Document | | | |
| Attachment change_order_form_PO188617.docx | Attach View Delete Emai | | |
| From -> PO DOTM1-0000188617 | | | |
| OK Cancel Refresh | | | |

×

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 Ord keeps track of number of ch orders performe the life of the | f the ange d during | PO Status: Budget Status: | Pend Appr Not ChK'd Hold From Further Pr | ocessing | | | |
|---|--|---------------------------|---|--|------------------------------|-------|------------|------------|
| *PO Date 03/27/2018 *Supplier 061422266F-001 *Supplier ID 0000010578 *Buyer KwolekEll PO Reference | Supplier Search Supplier Details GRAYSTONE GROUP ADVERTISIN ODT-Kwolek Ellen S | G Amount Sur | | Backordered Recvd | Create BackOrder | | | |
| Header Details PO Defaults PO Activities Requisitions • Actions | Activity Summary Edit Comments Add ShipTo Comments Document Status | | Merchandise Freight/Tax/Misc. Total Amount neumbrance Balance Obligation Amount | 1,363.46 USD 0.00 1,363.46 1,369.46 1,363.46 | Calculate | | | |
| Catalog Purchasing Kit | Item Search | Search for Line | es Line | | Retrieve | Eiret | 3 1-2 of 2 | (k) Last |
| Details Ship To/Due Date Statuses | Item Information Attributes RFQ | Contract Receiv | ring . | reisonalize rii | In the Mail of the | FILAL | 1-2 01 2 | Cast |
| Line Mitem | Description | PO Qty▲ *U | JOM Category | Price | Merchandise Amount Status | | | |
| | To be published in the Hartford Courant on March 7 and 21, 2018 | 1.0000 E/ | A 5500000 Q | 531.00000 | 531.00 Pending | Q | 1 | . - |
| | To be published in the New London Day on March 7 and 21, 2018 | 1.0000 E/ | A 5500000 Q | 838.46000 | 838.46 Pending | 0 | 1 | • |

Change Line to 'Amount Only'

This action WILL initiate a change order



1. Navigate to 'Add/Update POs'.

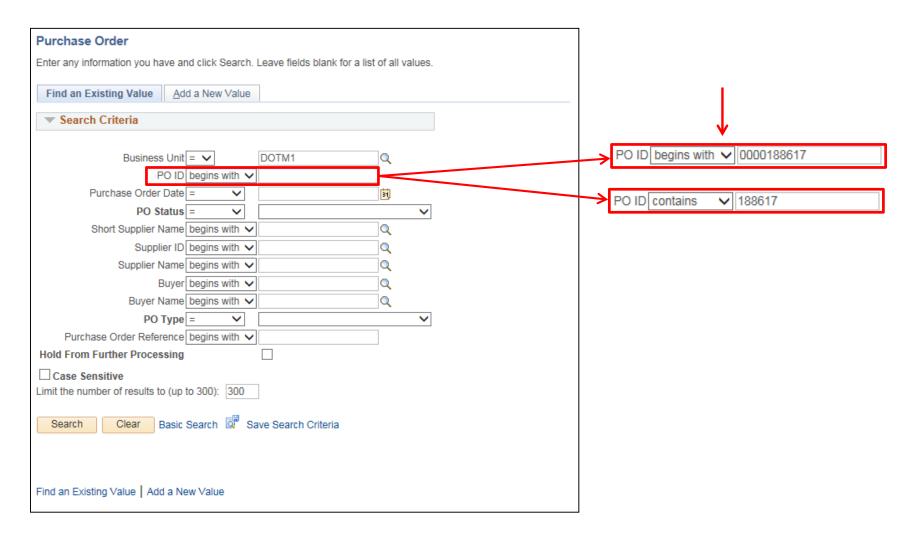
Main Menu 👻 > Core-CT Financials 👻 > Purchasing 👻 > Purchase Orders 👻 > Add/Update POs

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

| Purchase Order | | |
|-------------------------------------|-----------------|--|
| Find an Existing Value | Add a New Value | |
| Business Unit DOTM1 Q PO ID NEXT | | |
| Add | | |
| Find an Existing Value Ad | d a New Value | |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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 = V DOTM1 Q PO ID contains V 188617 Purchase Order Date = V IS PO Status = V V Short Supplier Name begins with V Q Supplier ID begins with V Q Buyer begins with V Q Buyer begins with V Q Buyer Same begins with V Q Buyer Name begins with V Q PO Type = V V |
| Hold From Further Processing |
| Case Sensitive |
| Search Results |
| View All First (1 of 1 (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 Kwolek Ell DOT-Kwolek Ellen S General (blank) N |
| Find an Existing Value Add a New Value |

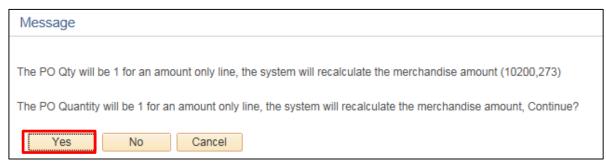
7. Click the **'Line Details'** icon on the PO line you would like to adjust. 📑

| /laintain Purchase Order | |
|---------------------------------------|--|
| Purchase Order | |
| Business Unit DOTM1 | PO Status Dispatched |
| PO ID 00001886 | 17 Budget Status Valid |
| Copy From | ✓ Hold From Further Processing |
| ▼ Header ③ | |
| *PO Date 03/27/2018 | Supplier Search Doc Tol Status Valid |
| *Supplier 061422266 | F-001 Create BackOrder Create BackOrder |
| *Supplier ID 000001057 | Supplier Details |
| *Buyer KwolekEll | 8 GRAYSTONE GROUP ADVERTISING Receipt states Not Record DOT-Kwolek Ellen S *Dispatch Method Email Dispatch |
| PO Reference | Amount Summary ? |
| PO Reference Header Det | tails Activity Summary Merchandise 1,369.46 USD |
| PO Defaults | and Activity commany |
| PO Activitie | s Add ShipTo Comments Total Amount 1,369.46 |
| Requisition: | Encumprance Balance 1,309.46 |
| | Obligation Amount 1,369.46 |
| Add Items From 🕜 | Select Lines To Display 👔 |
| Catalog | Item Search Search for Lines Line Q To Q Retrieve |
| Purchasing | Kit |
| ines 🕐 | Personalize Find View All 💷 👪 🛛 First 🕚 1-2 of 2 🕑 Last |
| | atuses Item Information Attributes RFQ Contract Receiving |
| ne Item | Description PO Qty *UOM Category Price Merchandise Amount Status |
| | To be published in the Hartford Courant on March 7 and 21, 2018 EA 5500000 C 531.00000 531.00 Approved 🖓 🔝 |
| | To be published in the New London Day on March 7 and 21, 2018 EA 5500000 CA 838.46000 838.46 Approved 🖓 😰 |
| View Printable Version View Approvals | |

- 8. Click on the Line Details 📑 icon on the line you would like adjust.
- 9. Click the blue triangle Δ change icon in the top right corner.
- 10. Click the gray arrow **b** to expand the **Attributes** section.
- 11. Check the **'Amount Only'** box. ✓ Checking the 'Amount Only' box will automatically adjust the line distribution to <u>Amount based</u>, as well. This required for an amount only line item.
- 12. 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 Produ | ucts | Backorder Status Not |
| 0.4 | | Backordered Amount Summary |
| Category ID 00042 | | |
| Amount to Receive 531.000 | USD | Merchandise Amount 531.00 USD |
| Quantity to Receive 1.0000 | | Doc. Base Amt 531.00 USD |
| Transaction Item Description | | |
| To be published in the Hartford Courant on March 7 | 7 and 21, 2018 | |
| | | |
| Preferred Language Item Description | | Attributes |
| | | Physical Nature Goods |
| Expand All Collapse All Item Information | | *Price Qty Schedule Quantity |
| Attributes | | *Price Date Due |
| ► RFQ | | Amount Only |
| Contract | | |
| Receiving | | |
| ▼ State of CT Custom Fields | | |
| Purchasing Authority GL71d | \checkmark | |

13. Click **'OK'** to the Message.



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

| | | | FIXE | <u>ED</u> PO Qt | y. on | Line 1 | | OP | PEN P | rice and M | erchandise Amou | unt | | | |
|-----------------------|---------------------------|------------------|--|-----------------|-------------|----------|-----|--------------------|------------|------------------------|------------------------------------|--------|---|----------|------|
| Lines (| | | | | | | | | | Personalize | Find View All 💷 🔜 | First | 1-2 of 2 | e 🕑 La | ast |
| Details Line | Ship <u>T</u> o/Due Date | <u>S</u> tatuses | Item Information | Attributes | <u>R</u> F0 | Contract | | Category | | Price | Merchandise Amount | | | | |
| | | Q Q | To be published in t To be published in t | | ₩, [] | 1.0000 | | 5500000 5500000 | Q [Q [| 531.00000 838.46000 | 531.00 Approved 838.46 Approved | Q Q | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | + | |
| View Prin View App | ntable Version provals | | | | | | *Go | to More | | | ~ | | | | |
| | | | | | | | | | | | | | | | |
| 🔚 Save | Return to Search | n 📑 Notif | fy 🤶 Refresh | | | | | | | | | 📑 Add | 🔎 Upd | ate/Disp | play |

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 St | tatus | Dispatched | Δ | × | | | | |
| PO ID 0000188617 | | | | Budget St | tatus | Not Chk'd | | | | | | |
| Copy From | \checkmark | | | | | Hold From | n Further Proc | essing | | | | |
| ▼ Header ③ | | | | | | | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | | | Doc Tol S | Status | Valid | | | | | | |
| *Supplier 061422266F-001 | | | | Backorder S | tatus | Not Backorde | ered | Create BackO | rder | | | |
| | Supplier Details | TIONIO | | Receipt § | Status | Not Recvd | | | | | | |
| *Supplier ID 0000010578 *Buyer KwolekEll | GRAYSTONE GROUP ADVER | TISING | | *Dispatch M | ethod | Email | ~ | Dispatch | | | | |
| | DOT-RWOICK Ellert S | | Amount Su | | | | | | | | | |
| PO Reference Header Details | Activity Summary | | | Mercha | ndise | 1.36 | 9.46 USD | | | | | |
| PO Defaults | Edit Comments | | | Freight/Tax | | | 0.00 | Calculate | • | | | |
| PO Activities | Add ShipTo Comments | | | Total Ar | | | 69.46 | | | | | |
| Requisitions • Actions | Document Status | | E | ncumbrance Ba | | | 69.46 | | | | | |
| - Actions | | | | Obligation A | mount | t 1,36 | 69.46 | | | | | |
| Add Items From (2) | | | Select Lines | s To Display(| ? | | | | | | | |
| Catalog | Item Search | : | Search for Lin | ies | Line | ς τ | o 🔍 | Retrieve | | | | |
| Purchasing Kit | | | | | | | | | | | | |
| Lines (?) | | | | | | Personalize | Find View | AIL 🛛 L 🔜 | First | 1-2 of 2 | € Las | st |
| Details Ship To/Due Date Statuses | Item Information Attributes RFC | 2 <u>C</u> ontr | act <u>R</u> ecei | ving 📖 | | | | | | | | |
| Line Item | Description | POO | Qty *UOM | Category | | Price | Merchandi Amou | se Int Status | | | | |
| 1 🔡 🔍 | To be published in the 🗘 🖾 🔣 | 1.00 | 000 EA 🔍 | 55000000 | ۹ [| 531.00000 | 531. | 00 Approved | \bigcirc | 2 | + | - |
| 2 📳 | To be published in the New London Day on March 7 and 21, 44 Eq. (2018) | 1.00 | 000 EA | 5500000 | ۹ [| 838.46000 | 838. | 46 Approved | Q | 1 | + | - |
| View Printable Version | | | *Go t | 0 More | | | ~ | | | | | |
| View Approvals | | | | | | | | | | | | |

- 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 O 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

| Jse Standard Comments Comment Status Active Inactivate | O Header Comments | |
|---|---|---------------------------------------|
| *Sort Method Comment Time Stamp *Sort Sequence Ascending Sort Sort Find View All First 2 of 2 Las Jse Standard Comments Comment Status Active Inactivate Inactivate Inactivate Inactivate Inactivate Active Inactivate Inactiva | Business Unit DOTM1 PO ID 0000 | 0188617 Supplier 061422266F-001 |
| Jse Standard Comments Comment Status Active Inactivate Change Order 1- 4/23/18 - Ellen Kwolek- Changed PO line 1 to Amount Only Imactivate Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Attach View Delete Email | El Reuleve Acuve Comments Only | |
| Change Order 1- 4/23/18 - Ellen Kwolek- Changed PO line 1 to Amount Only Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Attach View Delete Email | omments | Find View All First ④ 2 of 2 🕑 Last |
| Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Attachment Attach View Delete | lse Standard Comments | Comment Status Active Inactivate + |
| Attachment Attach View Delete Email | Change Order 1- 4/23/18 - Ellen Kwolek- Changed PO line | 1 to Amount Only 고양 |
| | Send to Supplier Show at Receipt | |
| From -> PO DOTM1-0000188617 | Send to Supplier Show at Receipt Show at Voucher Approval Justification | |
| | Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Show at Voucher | cation |
| OK Cancel Refresh | Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Attachment | cation |

Chow at Dessint

necessary boxes.

PO Change Order Form

15. IMPORTANT: <u>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: <u>Documents and Forms → Purchasing</u>. You can save a copy of the template to your computer for easy access.</u>

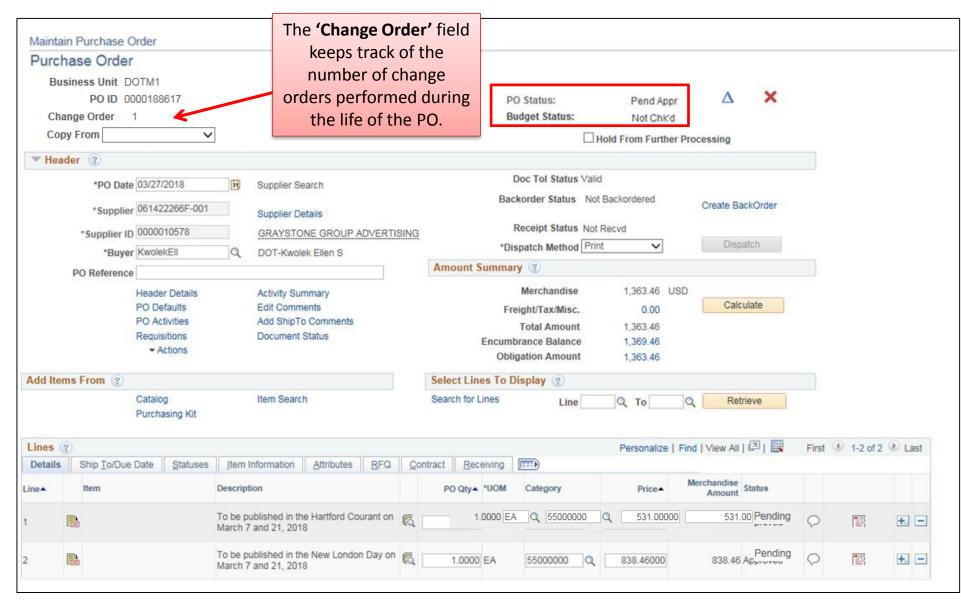
| ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST F TO BE ATTACHED TO THE HEADER COMMENT ON THE PO | ORM | |
|--|-------------------------------------|----|
| Contract # or GL Authorization: 12PSX0051AA Vendor Name: Graystone Group Advertising PO #: 0000188617 | Change Oro Request Fo (SAMPLE | rm |
| 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 cha comments section of the change order. | nge in the header | |
| Change Order Request Form Revised 04/12/13 | | |

- 16. Complete the **Change Order Form** with the appropriate information.
- 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. Attach
- 19. Click 'Browse' to select the file from Choose a File to Upload window.
- Click **'Upload'**. The attachment (filename) will appear in the **Associated Document** section, as shown below. 20.
- 21. Click 'OK' to exit.

R Save

| 2. Click 'Save' the PC | at the bottom of the m | nain page. | | | | |
|---|--|--------------------------|---|------------|--------|--------|
| | | no to also adjust the DC | Obligation | File Attac | chment | × |
| | | re to also adjust the PC | obligation, | | | Help |
| accordingly. (<u>See S</u> | <u>lides 12-14)</u> | | | | | |
| PO Header Comments | | | | Upload | Cancel | Browse |
| Business Unit DC | TM1 PO ID 0000188617 | Supplier 061422266F-001 | | | | |
| Retrieve Active Con *Sort Method Comment | | *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 - El | en Kwolek - Change PO Line 1 to Amou | nt Only | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | | | |
| Send to Supplier | Show at Receipt Approval Justification | | | | | |
| Associated Document | | | | | | |
| Attachment chang | e_order_form_PO188617.docx | Attach View Dele | e Email | | | |
| From -> PO DOTM1-00001 | 38617 | | | | | |
| OK Cancel | Refresh | | | | | |

<u>NOTE</u>: 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.



Add a New PO Line

This action WILL initiate a change order



1. Navigate to 'Add/Update POs'.

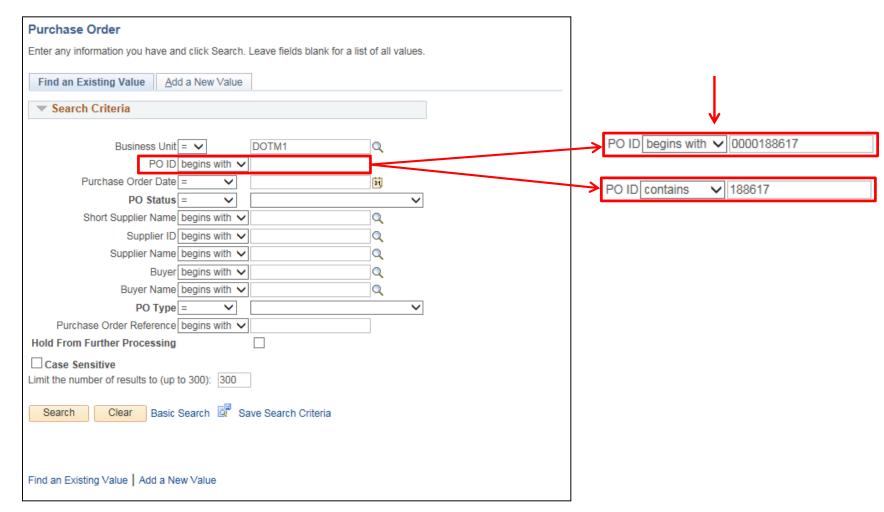
Main Menu 👻 > Core-CT Financials 🔹 > Purchasing 😴 > Purchase Orders 😴 > Add/Update POs

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

| Purchase Order | | |
|-------------------------------------|-----------------|---|
| Find an Existing Value | Add a New Value | _ |
| Business Unit DOTM1 Q PO ID NEXT | | |
| Add | | |
| Find an Existing Value Add | a New Value | |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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 = V |
| Short Supplier Name begins with 🗸 |
| Supplier ID begins with 🗸 |
| Supplier Name begins with 🗸 |
| Buyer begins with 🗸 |
| Buyer Name begins with 🗸 |
| PO Type = V |
| Purchase Order Reference begins with 🗸 |
| Hold From Further Processing |
| Case Sensitive |
| Limit the number of results to (up to 300): 300 |
| Search Clear Basic Search 🖾 Save Search Criteria |
| |
| View All |
| Business Unit PO ID Purchase Order Date PO Status Short Supplier Name 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 |

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

| Lines | ? | | | | | | | | Personalize | Find View All | 🛛 🔣 | First | ④ 1-2 of 2 | Last |
|---------|---|--|--|----|---------|----------|----------|-----------|-------------|-----------------------|----------|-------|------------|------|
| Details | | Ship <u>T</u> o/Due Date <u>S</u> tatuse | s Item Information Attributes RFQ | C | ontract | Rece | eiving [| [) | | | | | | |
| Line | | Item | Description | | F | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | | | |
| 1 | ŀ | | To be published in the Hartford Courant on March 7 and 21, 2018 | E, | 1 | 1.0000 I | EA | 5500000 | 531.00000 | 531.00 | Approved | 0 | 2 | + |
| 2 | ŀ | | To be published in the New London Day or March 7 and 21, 2018 | R. | 1 | 1.0000 I | EA | 5500000 Q | 838.46000 | 838.46 | Approved | Q | 2 | + |

9. 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 | 8 |
|--|--------------|
| Script Prompt: Enter number of rows to add: | OK Cancel |
| 1 | |

- 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'**.

| L | Lines (| ? | | | | | | | | | Personalize | Find View All | 🖉 🔣 | First | ④ 1-3 of 3 | 🕑 Last |
|----|---------|---|--------------------------|----------|---|-----------|--------------------|--------|----------|---|-------------|-----------------------|----------|------------|------------|-----------------|
| | Details | 5 | Ship <u>T</u> o/Due Date | Statuses | Item Information Attributes | RF | Q <u>C</u> ontract | Receiv | ing 💷 | | | | | | | |
| Li | ine | | Item | | Description | | PO Qty | MOU | Category | | Price | Merchandise Amount | Status | | | |
| 1 | | ŀ | | | To be published in the Hartford Courant on March 7 and 21, 2018 | R, | 1.0000 | EA | 55000000 | ٩ | 531.00000 | 531.00 | Approved | 0 | 1 | +. - |
| 2 | | • | | | To be published in the New London Day on March 7 and 21, 2018 | E, | 1.0000 | EA | 55000000 | ٩ | 838.46000 | 838.46 | Approved | 0 | 10 | + |
| 3 | | ŀ | | ্ | [J] | ₽ <u></u> | | Q | | Q | 0 | 0.000 | Pending | \bigcirc | 2 | + |

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

(SEE NEXT SLIDE)

- 16. Click on the gray arrow between to expand the **Contract** section, as shown below.
- 17. 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 *Q* options, if preferred.
- 18. The **'Purchasing Authority'** at the bottom of the page should be **Contracts**. Make the change if necessary.
- 19. Click **'OK'** at the bottom of the page to exit Line Details.

| PO ID 0000188617 | Supplier 061422266F-001 | | | |
|--|-------------------------|-----------------|--|-----------------|
| Line 1 | Item ID | | ned in the Hartford Courant on March 7 and 21, | |
| Line Details | | 2018 | | |
| Category 55000000 | | Line State | us Approved X A | |
| Description Published Products | | Backorder Sta | | |
| | - | | | |
| Category ID 00042 | | Amount Summary | Contract SetID S | STATE |
| Amount to Receive 531.000 | USD | Merchandise Amo | Contract ID | |
| Quantity to Receive 1.0000 | | Doc. Bar | Contract Version | |
| | | | Contract Line | 0 |
| Transaction Item Description To be published in the Hartford Courant on March 7 a | nd 21 2019 | | Category Line Number | |
| To be published in the Hartford Courant on March 7 a | nu 21, 2016 | | Group ID | |
| Preferred Language Item Description | | | | ontract Details |
| | | | Milestone Line | |
| | | | Release N | IEXT |
| Expand All Collapse All | | | | |
| Item Information | | | Rebate ID | |
| Attributes | | - | | |
| ▶ RFQ | | | | |
| Contract | | | | |
| , | | | | |
| ▶ Rece ving | | | | |
| | | | | |
| ▶ Rece ving | | | | |

🖺 🔍 To be published in the 🗘 🖾 🖏 1.0000 EA 🔍 55000000 🔍 453.24 Pending 📿 🔯 🛃 🖃

21. Click the **'Schedule'** icon.

| annainn i | urcha | se Order | | | | | | | | | | |
|-------------------------------------|---------|----------|----------------------------|---------|------------------|----------|------------------------------|--------------------------|----------|----------|----------|---------------------------------|
| Schedule | es | | | | | | | | | | | |
| Unit | DOT | M1 | | | Supplier 0614222 | 266F-001 | | PO State | us Disp | patched | | |
| PO ID 0000188617 PO Date 03/27/2018 | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| eturn to Mai | in Page | e | | | | | | | | | | |
| | | | | | | | | | | | | |
| Lines | | | | | | | | Find \ | /iew All | Firs | st 🕚 3 o | f 3 🕑 La |
| Lines Line 3 | | Item | To be publ | ished i | in the New Hav | | PO Qty | Find \ 1.0000 EA Me | | | | |
| | es | Item | To be publ | ished i | in the New Hav | | PO Qty Personalize Find | 1.0000 EA Me | rchand | lise Amt | 4 | 453.24 US |
| Line 3 | 1 | Item | To be publ <u>Matching</u> | | | | | 1.0000 EA Me | rchand | lise Amt | 4 | 453.24 US |
| Schedule | 1 | | | | | | Personalize Find | 1.0000 EA Me | rchand | lise Amt | 4 | f 3 🕑 La 453.24 US 🕑 Last |

- 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.)

| Distrib | utions for Sc | hedule 1 | | | | | | | | | | | | | | | | × |
|---------|---------------|------------------|-----------|-----------------------|------------------|-----------|-----------|------|---|-------------|---------|-----------|------------|--------------|--------------|--------|------------|------|
| | | | | | | | | | | | | | | | | | | Help |
| | | Unit DOTM1 | | Supp | lier 06142 | 22266F-00 |)1 | | | | | | | | | | | |
| | | PO ID 000018861 | 7 | h | tem | | | | | To be publi | shed ir | n the Nev | v Haven Re | gister o | n March 7 ar | nd 21, | 2018 | |
| | | Line 3 | | | | | | | | | | | | | | | | |
| l | Sch | edule 1 | | Sta | itus Active | е | | | | | | | | | | | | |
| I | | | | | | | | | | | | | | | | | | |
| | *Distribu | ute By Quantity | ~ | | | | | | | | | | Schedule (| Qty | 1.0 | 000 | | |
| | | | | | | | | | | | | Mercha | Indise Amo | unt | 453 | 3.24 l | JSD | |
| | Speed | IChart | Q | Multi-SpeedCha | irts | | | | | | | Doc. | Base Amo | unt | 453 | 3.24 L | JSD | |
| Distri | bution | | | | | | | | | Perso | onalize | Find | View All | <u>,</u> 🔜 | First | 1 (| of 1 🕑 Las | st |
| Chart | fields Deta | ils/Tax Asset In | formation | <u>R</u> eq Detail | <u>S</u> tatuses | Budget | Informati | on 📧 | | | | | | | | | | |
| Dist | Status | Percent | PO Qty | Merchandise Amount | Currency | *G | L Unit | Fund | | Dept | | SID | Program | n | *Account | | Bud Ref | |
| 1 | Open | 100.0000 | 1.0000 | 453.24 | USD | S | TATE Q | | Q | DOT57195 | Q | | ۹ 🗌 | Q | 54190 | Q | | C |
| | | | < | | | | | | | | | | | | | | > | |

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 Ord | der | | | | |
|------------------------|--|---|---|------------------------------------|------------------|
| Purchase Order | | | | | |
| Business Unit PO ID | DOTM1 0000188617 | | PO Status Budget Status | Dispatched Valid | × |
| Copy From | × | | | Hold From Further Pro | ocessing |
| - Header 🕐 | | | | | |
| *PO Date | 03/27/2018 | Supplier Search | Doc Tol Status | Valid | |
| *Supplier | 061422266F-001 | Supplier Details | Backorder Status | | Create BackOrder |
| *Supplier ID | 0000010578 | GRAYSTONE GROUP ADVERTISING | Receipt Status | | |
| *Buyer | KwolekEll | DOT-Kwolek Ellen S | *Dispatch Method | Print V | Dispatch |
| PO Reference | | | Amount Summary ② | | |
| | Header Details PO Defaults PO Activities Requisitions | Activity Summary Edit Comments Add ShipTo Comments Document Status | Merchandise Freight/Tax/Misc Total Amoun Encumbrance Balance Obligation Amoun | . 0.00 t 1,822.70 e 1,369.46 | Calculate |
| Add Items From 🕐 | | | Select Lines To Display 🕐 | | |
| | Catalog Purchasing Kit | Item Search | Search for Lines Line | Q ToQ | Retrieve |

- 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'**.

| PO Header Details | | |
|---|--|--------------|
| PO Details | | |
| Supplier 061422266F-001 | PO Date 03/27/2018 | |
| *PO Type GEN | Budget Status Valid | |
| *Billing Location DOTM1AD Q Billing Address | ☑ Tax Exempt | |
| | ID | 066000798DOT |
| Origin 947 Q DOT-ENGINE | Letter of Credit ID | Q |
| Use One Ship To | Ship To 0940000117 | |
| Currency | | |
| Currency Code USD Exchange Rate Detail | Base Currency USD | |
| Rate Date 01/01/1900 | Exchange Rate 1.00000000 | |
| Rate Type CRRNT | | |
| Process Control Option | | |
| ☑ Dispatch | Acknowledgements required for Not required | |
| *Method Print V | Accounting Date 07/01/2018 | |
| | Accounting Template STANDARD | |
| Obligation Amount | | |
| Obligation Amount 1,822.70 | K | 1 |
| Start Date 02/28/2018 | In this example, the | |
| End Date 06/30/2018 | new PO Total Amount | |
| | is \$1,822.70 | |
| | | |
| | | |
| | | |
| OK Cancel Refresh | | |

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 Or | der | | | | | |
|-------------------------------------|---|---|---|--|------------------|-------------------------------|
| Purchase Order | | | | | | |
| Business Unit PO ID Copy From | 0000188617 | | PO Status Budget Status | Dispatched Valid Hold From Further Pro | × | |
| ▼ Header ② | | | | | Joosang | |
| *Supplier | 03/27/2018 Di 061422266F-001 | Supplier Search Supplier Details | | Not Backordered | Create BackOrder | |
| | 0000010578 KwolekEll | GRAYSTONE GROUP ADVERTISING DOT-Kwolek Ellen S | Receipt Status *Dispatch Method | | Dispatch | |
| PO Reference | Header Details PO Defaults PO Activities Requisitions • Actions | Activity Summary Edit Comments Add ShipTo Comments Document Status | Amount Summary ② Merchandise Freight/Tax/Misc Total Amoun Encumbrance Balance Obligation Amoun | . 0.00 t 1,822.70 e 1,369.46 | Calculate | PO Obligation is now updated. |
| Add Items From (2) | | | Select Lines To Display 🕐 | | _ | |
| | Catalog Purchasing Kit | Item Search | Search for Lines Line | C To C | Retrieve | |

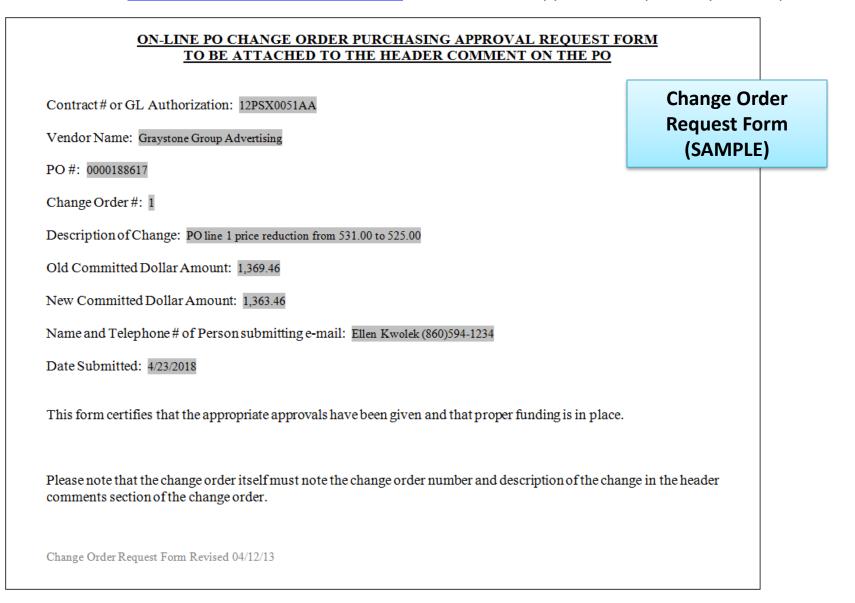
- 28. Enter the change order comment in the 'Comments' box indicated below– Include further details, if necessary.
 Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble O located on each PO line next to the 'Status' field.
- 29. The 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. | Send to Supplier | Show at Receipt |
|------------------|------------------|------------------------|
| | Show at Voucher | Approval Justification |

| O Header Comments | | | | | |
|--|-------------------------------------|---------------------|-----------------|---------|---------------|
| Business Unit DOTM1 | PO ID 0000188617 | Supplier (| 061422266F-001 | | |
| Retrieve Active Comments Only Sort Method Comment Time Stamp | Retrieve | *Sort Sequence | Ascending | ~ | Sort |
| omments | | | Find View All | First 🕚 | 2 of 2 🕑 Last |
| se Standard Comments | | Comment Status | Active | Ir | nactivate 🛨 |
| nange Order 1- 4/25/18 - Ellen Kwolek - Add | aed new line for new maven | n Register ad on Ma | arch / and 21 | | <u>a</u> ¢ |
| | w at Receipt roval Justification | n Register ad on Ma | arch / and 21 | | |
| Send to Supplier | w at Receipt | n Register ad on Ma | arch / and 21 | | |
| Send to Supplier Show Show at Voucher App | w at Receipt | | View Delet | ie | Email |
| Send to Supplier Show Show at Voucher Appl Associated Document | w at Receipt | | | te | |

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.



- 31. Complete the **Change Order Form** with the appropriate information.
- Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below. 32.
- Click the **'Attach'** button to attach the completed form to the change order comment. 33. Attach
- 34. Click 'Browse' to select the file from Choose a File to Upload window.
- Click 'Upload'. The attachment (filename) will appear in the Associated Document section, as shown below. 35.
- Click **'OK'** to exit. 36. File Attachment 37. Click **'Save'** the PO at the bottom of the main page. Help Browse. PO Header Comments Upload Cancel Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001 Retrieve Active Comments Only Retrieve *Sort Method Comment Time Stamp *Sort Sequence Ascending Sort \sim \mathbf{v} Find | View All First (1) 2 of 2 (1) Last Comments Inactivate Use Standard Comments + Comment Status Active 20 Change Order 1- 4/23/18 - Ellen Kwolek - Added new line for New Haven Register ad on March 7 and 21 Send to Supplier Show at Receipt Approval Justification Show at Voucher Associated Document Attach View Delete Attachment Email From -> PO DOTM1-0000188617 Cancel Refresh

×

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'.

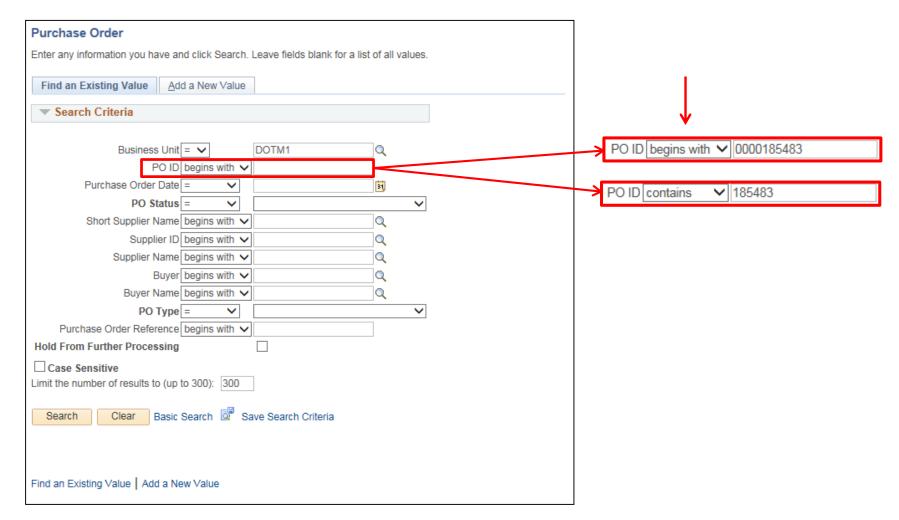
Main Menu 👻 > Core-CT Financials 👻 > Purchasing 👻 > Purchase Orders 👻 > Add/Update POs

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

| Purchase Order | | |
|-------------------------------------|-----------------|--|
| Find an Existing Value | Add a New Value | |
| Business Unit DOTM1 Q PO ID NEXT | | |
| Add | | |
| Find an Existing Value Add | d a New Value | |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000185483 or 185483) (Illustrated below)



- 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 = V DOTM1 |
| PO ID contains V 185483 |
| Purchase Order Date = V |
| PO Status = V |
| Short Supplier Name begins with 🗸 |
| Supplier ID begins with V |
| Supplier Name begins with V |
| Buyer begins with V |
| PO Type = V |
| Purchase Order Reference begins with V |
| Hold From Further Processing |
| |
| Limit the number of results to (up to 300): 300 |
| |
| Search Clear Basic Search 🖾 Save Search Criteria |
| Search Results |
| |
| |
| Business Unit PO ID Purchase Order Date PO Status Short Supplier Name Supplier Name Buyer Buyer Name PO Type Purchase Order Reference Hold From Further Processing DOTM1 0000185483 12/26/2017 Dispatched 060845880F-001 000000705 CAPITOL REGION COUNCIL OF GOVERNMENTS ConroyC DOT-Conroy Christine Grant Grant DOT0171043GR N |
| |
| |
| Find an Existing Value Add a New Value |

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

| Maintain Purchase Order | | |
|--|--|--|
| Purchase Order | | |
| Business Unit DOTM1 PO ID 0000185483 | | PO Status Dispatched Budget Status Valid |
| Copy From | \checkmark | Hold From Further Processing |
| ▼ Header ③ | | |
| *PO Date 12/26/2017 | Supplier Search | Doc Tol Status Valid |
| *Supplier 060845880F-001 | Supplier Details | Backorder Status Not Backordered Create BackOrder |
| *Supplier ID 000000705 | CAPITOL REGION COUNCIL OF | PF GOVERNMENTS Receipt Status Partial |
| *Buyer ConroyC | DOT-Conroy Christine | *Dispatch Method Print V Dispatch |
| PO Reference Grant DOT01710430 | GR | Amount Summary ② |
| Header Details PO Defaults PO Activities Requisitions | Activity Summary Add Comments Add ShipTo Comments Document Status | Merchandise450,000.00USDFreight/Tax/Misc.0.00CalculateTotal Amount450,000.00Encumbrance Balance138,933.83Obligation Amount450,000.00 |
| Add Items From 👔 | | Select Lines To Display 🕐 |
| Catalog | Item Search | Search for Lines Line Q To Q Retrieve |
| Lines 🕐 | | Personalize Find View All 💷 🔢 🛛 First 🕚 1 of 1 🛞 La: |
| Details Ship To/Due Date Statuses | Item Information Attributes RFQ | |
| ine Item D | Description | PO Qty *UOM Category Price Merchandise Amount |
| | Grant for Project No. DOT01710430GR | 1.0000 EA 81000000 Q 450,000.0000 Approved 🖓 🔛 |
| View Printable Version View Approvals | | *Go to More 🗸 |
| 🖷 Save 🛛 🔯 Return to Search 🛛 😰 Notify | <i>∂</i> Refresh | 📮 Add 🛛 🖉 Update/Disp |

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

| laintain Pu | urchas | se Order | | | | | | | | | | | | |
|---------------|---------|---------------|------------|--------------|--------------|------------------|---------------|-----------------------|----------------------|---------|------------|----------|-----------|--------|
| Schedule | es | | | | | | | | | | | | | |
| Unit | DOTM | //1 | | | Sup | plier 060845880 | DF-001 | | PO Stat | us Dis | spatched | I | | |
| PO ID | 00001 | 85483 | | | POI | Date 12/26/2017 | 7 | | | | | | | |
| Return to Mai | in Page | • | | | | | | | | | | | | |
| Lines | | | | | | | | | Find V | /iew Al | l Fir | st 🕚 | 1 of 1 | Last |
| Line 1 | | Item | Gra | nt for Proje | ect No. | DOT01710 | | PO Qty | 1.0000 EA M e | rchan | dise Am | t 4 | 450,000.0 | 00 USD |
| Schedule | es | | | | | | | Personalize Find | View All 💷 | | First | 1 | of 1 🕑 | Last |
| Details | Statu | uses Shipment | Matching F | Receiving | <u>F</u> rei | ight <u>R</u> TV | | | | | | | | |
| Sched | | *Due Date | *Ship To | | | *PO Qty | Price | Merchandise Amount | Status | | | | | |
| 1 | P | 12/26/2017 | 0940000032 | | 14 | 1.0000 | 450,000.00000 | 450,000.00 | Active | ۲ | <u>a</u> 💰 |) | | - |

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 <u>Total Expended Amount</u> 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.)
 <u>If you are adjusting a quantity based distribution</u>, divide the total expended amount

by the unit 'Price' to determine the total quantity received.



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

| Distrib | ution | | | | | | Personalize Fi | nd View All | | First 🕚 1-2 of 2 🔇 | Last |
|-----------------|--|---------|---------------|------------|------------------------|----------|----------------------------|------------------|---------------------|----------------------------------|------|
| <u>C</u> hartfi | 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 | ~ | + |
| 2 | Open | 50.5341 | Valid | 07/01/2018 | 138933.83 | USD | 138,933.83 | USD | 88,469.62 | | + |
| OK | Cance | Refresh | | • | | • | | | | | |

11. Return to the 'Chartfields' tab.

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

- 12. Adjust the <u>Open</u> 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.

| | | | | <u>A</u> | mount | <u>based</u> dis | ribut | ions (sh | iown b | elow) v | will have | an open ' | Merchai | ndise Amoun | ť | |
|------|--|--------|---------------|----------|------------|---------------------|---------------|-----------------|----------|------------|-----------|-----------|---------|-------------|---------|--------------|
| Dis | Distribution Personalize Find View All 💷 🔢 First 🕚 1-2 of 2 🕑 Last | | | | | | | | | | | | | | | |
| Ch | artfie | elds | <u>D</u> etai | s/Tax | Asset Info | ormation <u>R</u> e | Detail | Statuses | Budg | et Informa | tion 💷 | | | | | |
| Dist | | Status | | Percent | | Merchandis Amour | e t Currer | псу | *GL Unit | Fund | Dept | SID | Program | *Account | Bud Ref | ChartField 1 |
| 1 | 7 | Closed | | | 49.4659 | 222,596. | 5 USD | | STATE | 12052 | DOT57551 | 43130 | 35002 | 55070 | | |
| 2 | | Open | | | 50.5341 | 227,403.4 | 5 USD | | STATE | 12052 | DOT57551 | 43130 | 35002 | 55070 | | |
| | | | | | | < | | | | | | | | | | > |
| | OK | | Cance | el R | Refresh | | | | | | | | | | | |

| | | | | <u>Quanti</u> | <u>ty based</u> di | stributions | s (shown | below | /) will have a | n ope | n 'Qty' | | | |
|---------|--------|---------------------|-----------|---------------|-----------------------|--------------|----------------|-------|----------------|-----------|----------------|-------------|------------|------|
| Distrib | ution | | | | | | | | Personali | ze Find | View All 🗖 | 🔜 🛛 First 🤇 | 🖲 1 of 1 🕑 | Last |
| Chartfi | ields | <u>D</u> etails/Tax | Asset Inf | ormation | Req Detail | Statuses Bud | get Informatio | on |) | | | | | |
| Dist | Status | Percent | | PO Qty | Merchandise Amount | Currency | *GL Unit | Fund | Dept | SID | Program | *Account | Bud Ref | Chai |
| 1 | Open | | 100.0000 | 100.0000 | 6,973.00 | USD | STATE | 12001 | DOT57251 | 12518 | 34006 | 54072 | | |
| | | | | < | • | | | | | | | | | > |
| | | | | | | | | | | | | | | |
| OK | | Cancel | Refresh | | | | | | | | | | | |

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 Status | Dispatched | Δ | × | | | | |
| PO ID 0000188617 | | Budget Status | Not Chk'd | | | | | | |
| Copy From | ~ | | Hold From Furth | ner Proces | sing | | | | |
| ▼ Header ② | | | | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | Doc Tol Status | Valid | | | | | | |
| *Supplier 061422266F-001 | Supplier Details | Backorder Status | Not Backordered | Cr | eate BackOrder | | | | |
| *Supplier ID 0000010578 | GRAYSTONE GROUP ADVERTISIN | IG Receipt Status | Not Recvd | | | | | | |
| *Buyer KwolekEll | DOT-Kwolek Ellen S | *Dispatch Method | Email 🗸 | | Dispatch | | | | |
| PO Reference | | Amount Summary 🕐 | | | | | | | |
| Header Details | Activity Summary | Merchandise | 1,369.46 | USD | | _ | | | |
| PO Defaults | Edit Comments | Freight/Tax/Misc | . 0.00 | | Calculate | J | | | |
| PO Activities Reguisitions | Add ShipTo Comments Document Status | Total Amount | | | | | | | |
| ≺ Actions | Document Status | Encumbrance Balance | | | | | | | |
| | | Obligation Amoun | t 1,369.46 | | | | | | |
| Add Items From (?) | | Select Lines To Display 🕐 | | | | | | | |
| Catalog Purchasing Kit | Item Search | Search for Lines Line | 🔍 То | Q | Retrieve | | | | |
| | | | | | | | | | |
| Lines (?) Details Ship To/Due Date Statuses | Item Information Attributes RFQ | Contract Receiving | Personalize Find | I View All | @ <mark> </mark> F | First 🕙 1- | 2 of 2 🌘 | Las | st |
| | | | M | erchandise | | | | | |
| Line Item | Description | PO Qty *UOM Category | Price | erchandise Amount | Status | | | | |
| 1 📑 🔤 🔍 | To be published in the 🗘 🖾 🖏 | 1.0000 EA Q 55000000 Q | 531.00000 | 531.00 | Approved | | <u>0</u> | + | - |
| 2 | To be published in the New London Day on March 7 and 21, | 1.0000 EA 55000000 Q | 838.46000 | 838.46 | Approved | 2 1 | 3 | + . [| - |
| View Printable Version | | *Go to More | | ~ | | | | | |
| View Approvals | | | | | | | | | |

- 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 O 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. | Send to Supplier | Show at Receipt Approval Justification | | | |
|-------------------------|--------------------------------------|--|-----------------|-----------------------|----|
| PO Header Comment | S | | | | |
| Business Unit | DOTM1 PO ID 0000 | 188617 Supplier | 061422266F-001 | | He |
| Retrieve Active | | *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 | | <u></u> । অ | |
| Send to Supplier | Show at Receipt Approval Justifica | ition | | | |
| Associated Docume | nt | | | | |
| Attachment | | Attach | View Delet | te Email | |
| From -> PO DOTM1-00 | 00188617 | | | | |
| OK Cancel | Refresh | | | | |

PO Change Order Form

18. IMPORTANT: <u>DOT</u> 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: <u>Documents and Forms → Purchasing</u>. You can save a copy of the template to your computer for easy access.

| ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST F TO BE ATTACHED TO THE HEADER COMMENT ON THE PO | ORM | |
|--|-------------------------------------|----|
| Contract # or GL Authorization: 12PSX0051AA Vendor Name: Graystone Group Advertising PO #: 0000188617 | Change Oro Request Fo (SAMPLE | rm |
| 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 cha comments section of the change order. | nge in the header | |
| Change Order Request Form Revised 04/12/13 | | |

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. Attach
- 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. File Attachment Click **'Save'** the PO at the bottom of the main page. 25. Browse. PO Header Comments Upload Cancel Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001 ✓ Retrieve Active Comments Only Retrieve *Sort Method Comment Time Stamp \sim *Sort Sequence Ascending Sort \sim Comments Find | View All First 🕙 2 of 2 🕑 Last Inactivate Use Standard Comments +Comment Status Active 20 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 Attach View Delete Attachment Email From -> PO DOTM1-0000188617 Cancel Refresh OK.

×

Help

- 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)

| ▼ Header ③ | | | |
|--|--|---|-----------------------------------|
| *PO Date 12/26/2017 | Supplier Search | Doc Tol Status Valid | |
| *Supplier 060845880F-001 | Supplier Details | Backorder Status Not Backordered Crea | ate BackOrder |
| *Supplier ID 000000705 | CAPITOL REGION COUNCIL OF GOVE | | |
| *Buyer ConroyC | DOT-Conroy Christine | *Dispatch Method Print V | Dispatch |
| PO Reference Grant DOT0171043GR | | Amount Summary (?) | |
| Header Details PO Defaults PO Activities Requisitions | Activity Summary Add Comments Add ShipTo Comments Document Status | Merchandise450,000.00USDFreight/Tax/Misc.0.00Total Amount450,000.00Encumbrance Balance138,933.83Obligation Amount450,000.00 | Calculate |
| Add Items From ② | | Select Lines To Display 👔 | |
| Catalog | Item Search | Search for Lines | Retrieve |
| Lines 👔 | | Personalize Find View All | I 💷 🔜 🛛 First 🕚 1 of 1 🕑 Last |
| Details Ship To/Due Date Statuses Item | Information <u>Attributes</u> <u>R</u> FQ <u>Cor</u> | ntract Receiving | |
| Line Item Descrip | ption P | O Qty *UOM Category Price Merchandise Amount | Status |
| | or Project No. 🕰 1 710430GR 1 | .0000 EA 81000000 Q 311,066.17 450,000.00 A | Approved 🖓 💽 🖃 |

PO Change Orders: Add a PO Line

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

| PO Header Details | | | | |
|------------------------|--------------------------|-------------------------------|--------------|--------------|
| PO Details | | | | |
| Supplier | 060845880F-001 | PO Date | 12/26/2017 | |
| *PO Type | GRT Q | Budget Status | Valid | |
| *Billing Location | DOTM1ADI | | Tax Exempt | |
| Dining Evention | Borning Address | ID | | 066000798DOT |
| Origin | 945 Q DOT-FINFIN | Letter of Credit ID | | Q |
| | Use One Ship To | Ship To | 0940000032 | |
| Currency | | | | |
| Currency Code | USD Exchange Rate Detail | Base Currency | USD | |
| Rate Date | 01/01/1900 | Exchange Rate | 1.00000000 | |
| Rate Type | CRRNT | | | |
| Process Control Option | | | | |
| | ✓ Dispatch | Acknowledgements required for | Not required | |
| *Method | Print 🗸 | Accounting Date | 07/01/2018 | |
| | | Accounting Template | STANDARD | |
| Obligation Amount | | | | |
| Obligation Amount | 311,066.17 | - | | |
| Start Date | 12/26/2017 | In this exan | nple, the | |
| | 06/30/2019 | Total PO Amo | - | |
| End bato | 00/30/2013 | \$311,06 | | |
| | | <i>Ş</i> 511,00 | 0.17. | |

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.

| Maintain Purchase Order | | |
|--|--|---|
| Purchase Order | | |
| Business Unit DOTM1 | | PO Status Dispatched |
| PO ID 0000185483 | | Budget Status Valid |
| Copy From | \checkmark | Hold From Further Processing |
| ▼ Header ③ | | |
| *PO Date 12/26/2017 | 3 Supplier Search | Doc Tol Status Valid |
| *Supplier 060845880F-001 | Supplier Details | Backorder Status Not Backordered Create BackOrder |
| *Supplier ID 000000705 | CAPITOL REGION COUNC | CIL OF GOVERNMENTS Receipt Status Partial |
| *Buyer ConroyC | Q DOT-Conroy Christine | *Dispatch Method Print V Dispatch |
| PO Reference Grant DOT01710 | | Amount Summary ② |
| Header Details PO Defaults PO Activities Requisitions | Activity Summary Add Comments Add ShipTo Comments Document Status | Merchandise311,066.17USDFreight/Tax/Misc.0.00CalculatePO Obligation isTotal Amount311,066.17now updated.Encumbrance Balance138,933.83138,933.83 |
| ✓ Actions | | Obligation Amount 311,066.17 |
| Add Items From ② | | Select Lines To Display 👔 |
| Catalog | Item Search | Search for LineQ ToQ Retrieve |
| Lines ② Details Ship To/Due Date Statuses | Item Information | Personalize Find View All [2]] First ④ 1 of 1 ④ Last RFQ Contract Receiving |
| Line Item | Description | PO Qty *UOM Category Price Merchandise Amount Status |
| 1 | Grant for Project No. DOT01710430GR | [5] I.0000 EA 81000000 Q 311,066.1700(310,066.17 Approved ○ 10 11,066.17 Approved ○ 10 11,06 |
| View Printable Version View Approvals | | *Go to More V |
| Return to Search | tify 2 Refresh | 📑 Add 🛛 🖉 Update/Display |

Cancel a PO Line (No Activity ONLY)

This action WILL initiate a change order



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 <u>close</u> the line by reducing it to expenditures. (See Close a PO Line instructions, if so.)

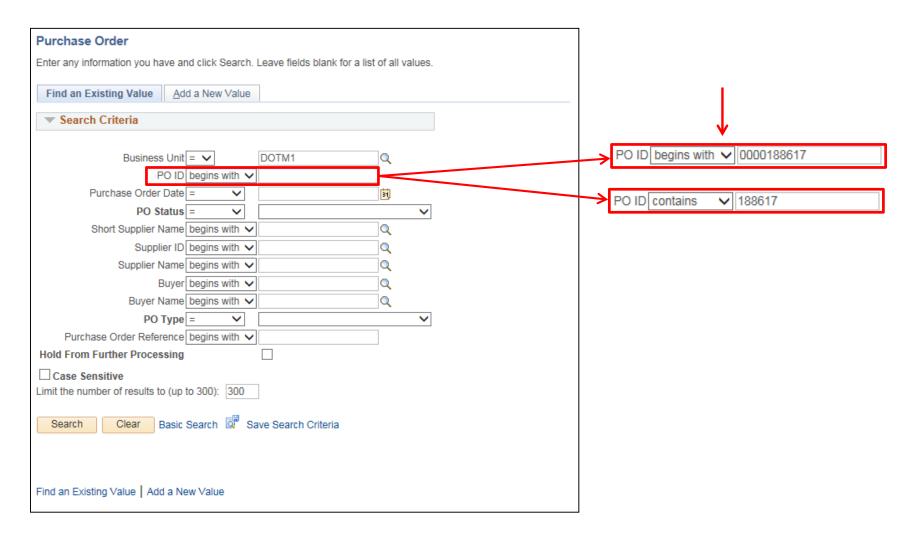
1. Navigate to 'Add/Update POs'.

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

| Purchase Order | |
|--|--|
| Find an Existing Value Add a New Value | |
| Business Unit DOTM1 | |
| Add | |
| Find an Existing Value Add a New Value | |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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.

| urchase Order |
|---|
| ter 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 = V DOTM1 |
| PO ID contains V 188617 |
| Purchase Order Date = V |
| PO Status = V |
| Short Supplier Name begins with 🗸 |
| Supplier ID begins with 🗸 |
| Supplier Name begins with V |
| Buyer begins with 🗸 |
| Buyer Name begins with 🗸 |
| PO Type = V |
| Purchase Order Reference begins with V |
| old From Further Processing |
| Case Sensitive |
| nit the number of results to (up to 300): 300 |
| |
| Search Clear Basic Search Criteria |
| earch Results |
| ew All First 🕚 1 of 1 🕑 Las |
| usiness 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 |
| OTM1 0000188617 03/27/2018 Dispatched 061422266F-001 0000010578 GRAYSTONE GROUP ADVERTISING KwolekEll DOT-Kwolek Ellen S General (blank) N |
| |
| nd an Existing Value Add a New Value |
| |

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

| | | | | | r | | | | | |
|--|---|---|--|---|---|---|--|---|---|---|
| DOTM1 | | | | PO Status | Dispatched | ΔΧ | | | | |
| 000188617 | | | В | udget Status | Valid | | | | | |
| `````````````````````````````````````` | Image: A start of the start of | | | | Hold From Fur | ther Processing | | | | |
| | | | | | | | | | | |
| 3/27/2018 | Supplier Search | blier Search | | | Valid | | | | | |
| 61422266E-001 | | | Bac | korder Status | Not Backordered | Create | BackOrder | | | |
| | | | | Pacaint Status | Not Pocyd | | | | | |
| | | ISING | | - | | D | spatch | | | |
| wolekEll | DOT-Kwolek Ellen S | | | - | | | | | | |
| | | | Amount Summar | | | | | | | |
| | Activity Summary | | | | ., | | alculato | | | |
| | | | Fre | | | | alculate | | | |
| equisitions | Document Status | | Encumb | | ., | | | | | |
| Actions | | | | | | | | | | |
| | | 1 | Select Lines To D | isplay 🕐 | | | | | | |
| atalog | Item Search | | Search for Lines | | | | etrieve | | | |
| urchasing Kit | | | | Line | | | | | | |
| | | | | | Personaliz | e Find View / | AII 💷 🔣 | First | 1-2 of 2 | ● Last |
| ate <u>S</u> tatuses <u>I</u> te | em Information <u>Attributes</u> <u>R</u> FQ | <u>C</u> o | ntract <u>R</u> eceiving |) | | | | | | |
| Desc | ription | | PO Qty▲ *UOM | Category | Price | | | | | |
| | | ¹ 🕰 | 1.0000 EA | 55000000 | Q 531.0000 | 531. | 00 Approved | Q | 1 | + . |
| | pe published in the New London Day or ch 7 and 21, 2018 | n 🕰 | 1.0000 EA | 55000000 | Q 838.4600 | 0 838. | 46 Approved | \bigcirc | | . |
| | 0000188617 | 0000188617 03/27/2018 Supplier Search 061422266F-001 Supplier Details 0000010578 GRAYSTONE GROUP ADVERT 0000010578 GRAYSTONE GROUP ADVERT 000010578 GRAYSTONE GROUP ADVERT 000010578 Contents 000010578 Activity Summary VO Defaults Edit Comments VO Activities Add ShipTo Comments Document Status Document Status * Actions Item Search Catalog Item Search Purchasing Kit Description To be published in the Hartford Courant or March 7 and 21, 2018 To be published in the New London Day of the Search | 0000188617 03/27/2018 Supplier Search 061422266F-001 Supplier Details 0000010578 GRAYSTONE GROUP ADVERTISING 0000010578 GRAYSTONE GROUP ADVERTISING 000010578 GRAYSTONE GROUP ADVERTISING SwolekEll DOT-Kwolek Ellen S Vo Activities Add ShipTo Comments 000001057 Document Status * Actions Document Status * Actions Item Search * Actions Item Search | D0000188617 E D0000188617 V D0000188617 V D000188617 V D000188617 V D00010578 Supplier Details D000010578 GRAYSTONE GROUP ADVERTISING SwolekEll DOT-Kwolek Ellen S Amount Summary VO OO Defaults Edit Comments VO Defaults Edit Comments O Activities Add ShipTo Comments Document Status Encumbre * Actions Document Status * Actions Select Lines To D Statalog Item Search Search for Lines * ate Statuses Item Information Attributes RFQ Contract Receiving Description Po Qty * 100M March 7 and 21, 2018 1.0000 EA To be published in the New London Day on En 1.0000 EA | D000189817 Budget Status 03/27/2018 Supplier Search Doc Tol Status 061422266F-001 Supplier Details Backorder Status 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status 000010578 GRAYSTONE GROUP ADVERTISING Receipt Status 000010578 GRAYSTONE GROUP ADVERTISING Receipt Status 000010578 GRAYSTONE GROUP ADVERTISING Poispatch Method Add ShipTo Comments Comments Freight/Tax/Misc: 00 Activities Add ShipTo Comments Total Amount 000 Activities Add ShipTo Comments Colligation Amount Contract Select Lines To Display (2) Select Lines To Display (2) Statuses Item Search Search for Lines Line turchasing Kit Item Search Secontract Receiving To be published in the Hartford Courant on March 7 and 21, 2018 1.0000 EA 55000000 To be published in the New London Day on (2) To be published in the New London Day on (2) 1.0000 EA | D000188617 Budget Status Vaid Image: Constraint of the status value Hold From Fur D327/2018 Supplier Search Doc Tol Status Valid Backorder Status Not Backordered Supplier Details 0000010578 GRAYSTONE GROUP ADVERTISING Receipt Status Not Recvd 0000010578 OPT-Kwolek Ellen S Merchandise 1,369.46 Image: Constraint of the status Statu | D000183817 Budget Status Valid Image: status Image: status | D000188617 Budget Status Valid Image: Status Hold From Further Processing Image: Status Supplier Search Doc Tol Status Valid Is2272018 Supplier Details Receipt Status Not Backordered Create BackOrder Is22266F-001 Supplier Details Receipt Status Not Recvd Dispatch VolockEil DOT-Kwolek Ellen S Activity Summary Image: Comments Image: Comments | Budget Status Valid Budget Status Valid Bit/22266F-001 Supplier Details GRAYSTONE GROUP ADVERTISING ODOT-Kwolek Ellen S Bit/22266F-001 Supplier Details GRAYSTONE GROUP ADVERTISING ODOT-Kwolek Ellen S Activity Summary CodekEll Dot-Kwolek Ellen S Activity Summary CodekEll Dot-Kwolek Ellen S Activity Summary CodekEll Dot-Kwolek Ellen S Activity Summary CodekEll Doc-Tot Status Note CodekEll Doc-Tot Status Note CodekEll Doc-Tot Status Note CodekEllen S Activity Summary Merchandise 1,369,46 USD Calculate Odefaults Edit Comments Add ShipTo-Comments Codeautistus Colligition Amount 1,369,46 Urchasing Kit Item Search Statuse Item Information Attributes Receivition Po dty Urchasing Kit Po dty Undek Item Search Receiving Code | D000188617 Budget Status Vaid Image: Status Supplier Search Doc Tol Status Valid Backorder Status Not Backordered Create BackOrder Supplier Details GRAYSTONE GROUP ADVERTISING Doc Tol Status Valid Backorder Status Not Backordered Create BackOrder Mount Summary OD Doc Tol Status Valid Bedget Details Activity Summary Doc Tol Status Not Recvd ODD-r-Kwolek Ellen S DOT-Kwolek Ellen S Amount Summary ? Header Details Activity Summary Merchandise 1,369.46 USD O Activities Add ShipTo Comments Total Amount 1,369.46 USD Vactions Doc ument Status Select Lines To Display ? Eatlog Total Amount 1,369.46 Vactors Select Lines To Display ? Total Amount 1,369.46 Encumbrance Balance 1,369.46 Contract Search for Lines Line Total Amount 1,369.46 Contract Search for Lines Line Total Amount 1,369.46 Contract Search for Lines Line Total Amount 1,369.46 |

9. Click the red **X** icon on the line you would like to cancel. \times

| Lines (| | | | | | | | | | | | | | | | | | |
|---------|----------|------|---|-------------|------------------|-----------|---------------------------|---------|---|------------|--------------|-----------|----------|----------|------------------|---|---|------------------|
| Line | | Item | Description | PO Qty *UOM | Category | Price | Merchandise Amount Status | 18 | | Due Date | Ship To | Price | s | Status | Backorder Status | | | Supplier Item ID |
| 1 | 1 | | To be published in the Hartford Courant on March 7 and 21, 2018 | 1.0000 EA | 55000000 Q | 531.00000 | 531.00 Appro | roved 🖓 | 1 | 03/27/2018 | 0940000117 C | 531.00000 | 10 A | Approved | Not Backordered | Δ | × | |
| 2 | 1 | | To be published in the New London Day on March 7 and 21, 2018 | 1.0000 EA | 5500000 Q | 838.46000 | 838.46 Appro | roved 🖓 | 1 | 03/27/2018 | 0940000117 | 838.46000 | 1 | Approved | Not Backordered | Δ | × | |

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. |
| Yes No |

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

| Lines ? | Lines 🛞 | | | | | | | | | | | | | |
|---------|------------|------|---|-----|--------|------|----------|-----------|--------------------|----------|---|---|------------|--------------|
| Line | | Item | Description | | PO Qty | *UOM | Category | Price | Merchandise Amount | Status | | | Due Date | Ship To |
| 1 | 1 | | To be published in the Hartford Courant on March 7 and 21, 2018 | E, | 1.0000 | EA | 55000000 | 531.00000 | 531.00 | Canceled | Q | 1 | 03/27/2018 | 0940000117 |
| 2 | ₽ ₽ | | To be published in the New London Day on March 7 and 21, 2018 | FC, | 1.0000 | EA | 5500000 | 838.46000 | 838.46 | Approved | Ø | 1 | 03/27/2018 | 0940000117 Q |

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'.)

| Business Un PO I | it DOTM1 D 0000188617 | | | | | Bu | PO Status dget Status | Dispatched Not Chk'd | | Δ Χ | | | | |
|--|--|--|-------------------------------|------------|---------------------|----------|--|-------------------------|--------------------------------|-----------------------|------------|-------|------------|----------------|
| Copy From | n | \checkmark | | | | | | Hold From | n Furthe | er Processing | | | | |
| ▼ Header (?) | | | | | | | | | | | | | | |
| *PO Dat | e 03/27/2018 | Supplier S | Search | | | Do | oc Tol Status | Valid | | | | | | |
| *Supplie | 061422266F-001 | Supplier [| Details | | | Back | order Status | Not Backorde | ered | Create B | ackOrder | | | |
| *Supplier I | D 0000010578 | GRAYST | ONE GROUP ADVERTI | SING | | | eceipt Status | | | | | | | |
| *Buye | er KwolekEll | DOT-Kwo | lek Ellen S | | | | atch Method | Email | ~ | Dis | patch | | | |
| PO Reference | e | | | | Amount Su | ummary | ? | | | | | | | |
| | Header Details PO Defaults PO Activities Requisitions | Activity St Edit Com Add Ship Documen | nents o Comments | | E | Freig | Merchandise ght/Tax/Misc. fotal Amount ance Balance | t 83 | 8.46 U 0.00 8.46 9.46 | | culate | | | |
| | | | | | | Obliga | ation Amount | t 1,36 | 9.46 | | | | | |
| Add Items From ② | | | | | Select Line | s To Dis | splay 🕐 | | | | | | | |
| | Catalog Purchasing Kit | Item Sear | ch | | Search for Li | nes | Line | ۱ ۵ | o | Q Re | trieve | | | |
| Lines 🕐 | | | | | | | | Pers | onalize | Find View All | 🛛 🔣 | First | ④ 1-2 of 2 | 🕑 Last |
| Details Ship To/Due | e Date <u>S</u> tatuses | Item Information | <u>Attributes</u> <u>R</u> FQ | <u>C</u> 0 | ntract <u>R</u> ece | iving | | | | | | | | |
| Line Item | | Description | | | PO Qty | *UOM | Category | | Price | Merchandise Amount | | | | |
| 1 | | To be published in t March 7 and 21, 20 | he Hartford Courant on 18 | E, | 1.0000 E | EA | 55000000 | 531 | 00000 | 531.00 |) Canceled | Q | 1 | + |
| 2 | | To be published in t March 7 and 21, 20 | he New London Day on 18 | E, | 1.0000 | EA | 55000000 | Q 838. | 46000 | 838.46 | Approved | Q | 1 | . – |
| View Printable Version View Approvals | | | | | *G0 | to Mo | re | | | ~ | | | | |
| Return to | Search | fy 🕃 Refresh | | | | | | | | | | 📑 Add | J | ate/Display |

- 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 O 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

| O Header Comments | | | | |
|---|----------------|-----------------|---------|---------------|
| Business Unit DOTM1 PO ID 0000188 | 3617 Supplier | 061422266F-001 | | |
| Retrieve Active Comments Only Retrieve *Sort Method Comment Time Stamp | *Sort Sequence | Ascending | ~ | Sort |
| omments | | Find View All | First 🕚 | 2 of 2 🕑 Last |
| Jse Standard Comments | Comment Status | e Activo | In | nactivate + |
| | Comment status | S Active | | |
| Change Order 2- 3/1/19- Nicole Mason- Cancelled PO line 1 Send to Supplier Show at Receipt Show at Voucher Approval Justification | | S ALUVE | | <u>م</u> |
| Change Order 2- 3/1/19- Nicole Mason- Cancelled PO line 1 Send to Supplier Show at Receipt | | S ALUVE | | |
| Change Order 2- 3/1/19- Nicole Mason- Cancelled PO line 1 Send to Supplier Show at Receipt Show at Voucher Approval Justification | | View Delet | ie 🗌 | |

Show at Receipt

necessary boxes.

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 F TO BE ATTACHED TO THE HEADER COMMENT ON THE PO | ORM | | | | | | |
|---|-------------------|--|--|--|--|--|--|
| Contract # or GL Authorization: 12PSX0051AA Change Ord Vendor Name: Graystone Group Advertising Request For PO #: 0000188617 (SAMPLE) | | | | | | | |
| 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 cha comments section of the change order. | nge in the header | | | | | | |
| Change Order Request Form Revised 04/12/13 | | | | | | | |

- 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. Attach
- 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.
- Click **'OK'** to exit. 20. File Attachment PO Header Comments Browse. Upload Cancel Business Unit DOTM1 PO ID 0000188617 Supplier 061422266F-001 ✓ Retrieve Active Comments Only Retrieve *Sort Method Comment Time Stamp $\mathbf{\vee}$ *Sort Sequence Ascending Sort \mathbf{v} Comments Find | View All First 🕙 2 of 2 🕑 Last Inactivate Use Standard Comments + Comment Status Active 20 Change Order 2- 3/1/19- Nicole Mason- Cancelled PO line 1 Send to Supplier Show at Receipt Show at Voucher Approval Justification Associated Document Attach View Delete Attachment Email From -> PO DOTM1-0000188617 OK Cancel Refresh

×

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 Budget Status | Dispatched Not Chk'd | Δ | × | |
|---|-----------------------------|----------------------------|-------------------------|---------|------------------|--|
| Copy From 🗸 | | | Hold From Furt | her Pro | ocessing | |
| ▼ 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 | | Amount Summary 🕜 | | | | |
| Header Details | Activity Summary | Merchandise | 838.46 | USD | | |
| PO Defaults | Edit Comments | Freight/Tax/Misc | . 0.00 | | Calculate | |
| PO Activities | Add ShipTo Comments | Total Amoun | t 838.46 | | | |
| Requisitions - Actions | Document Status | Encumbrance Balance | e 1,369.46 | | | |
| • Actions | | Obligation Amoun | t 1,369.46 | | | |

- 22. Enter the new **PO Obligation** in the **'Obligation Amount'** field. <u>This typically matches the PO **'Total Amount'**</u>. 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 | | |
| *Billing Location DOTM1AD Q Billing Address | E | ✓ Tax Exempt | |
| | ID [| (| 066000798DOT |
| Origin 947 Q DOT-ENGINE | Letter of Credit ID | | Q |
| 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 V | Accounting Date | 07/01/2018 | |
| | Accounting Template | STANDARD | |
| Obligation Amount | | | |
| Obligation Amount 838.46 |] | | |
| Start Date 02/28/2018 | In this exc | ample, the | |
| End Date 06/30/2018 | | nount is now | |
| | | <i>8.46</i> . | |
| | | 0.40. | |
| | | | |
| | | | |
| OK Cancel Refresh | | | |

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 Status | Dispatched | × | | | |
| PO ID 0000188617 | | Budget Status | Not Chk'd | | | | |
| Copy From | ~ | | Hold From Further | Processing | | | |
| ▼ Header ③ | | | | | | | |
| *PO Date 03/27/2018 | B Supplier Search | Doc Tol Status | Valid | | | | |
| *Supplier 061422266F-001 | Supplier Details | Backorder Status | Not Backordered | Create BackOrder | | | |
| *Supplier ID 0000010578 | GRAYSTONE GROUP ADVERTISING | | | | | | |
| *Buyer KwolekEll | Q DOT-Kwolek Ellen S | *Dispatch Method | Print V | Dispatch | | | |
| PO Reference | | Amount Summary (?) | | | | | |
| Header Details | Activity Summary | Merchandise | 838.46 US | | | | |
| PO Defaults | Edit Comments | Freight/Tax/Misc | 0.00 | Calculate | | PO Ob | ligation is |
| PO Activities Requisitions | Add ShipTo Comments Document Status | Total Amount | | | | now u | updated. |
| ✓ Actions | Document Status | Encumbrance Balance Obligation Amount | | - | | | |
| | | | 638.40 | | | | |
| Add Items From ② | | Select Lines To Display 🕐 | | | | | |
| Catalog Purchasing Kit | Item Search | Search for Lines Line | Q To | Retrieve | | | |
| Furthability Rit | | | | | | | |
| Lines 👔 | | | Personalize I | Find View All 💷 🔣 | First 🕚 1-2 of | 2 🕑 Last | |
| Details Ship To/Due Date Statuses | Item Information Attributes RFQ C | ontract <u>R</u> eceiving | | | | | |
| Line Item D | Description | PO Qty *UOM Category | Price | Merchandise Amount Status | | | |
| | o be published in the Hartford Courant on Aarch 7 and 21, 2018 | 1.0000 EA 55000000 | 531.00000 | 531.00 Canceled | | + . – | |
| | o be published in the New London Day on Road Alarch 7 and 21, 2018 | 1.0000 EA 55000000 | Q 838.46000 | 838.46 Approved | | + | |
| View Printable Version View Approvals | | *Go to More | ~ | • | | | |

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

🔚 Save

| | *PO Date | 9 03/27/2018 | Supplier Se | earch | | | Doc Tol Status Val | | | | | | |
|-----------|---|---------------------------|--|----------------------------|------------------|--------------------------|--------------------|------------|-------------------|------------------|------------|----------|------------|
| | *Supplier 061422266F-001 Supplier Details | | | Bac | korder Status No | ot Backordered | Create | BackOrder | | | | | |
| | *Supplier IE | 0000010578 | GRAYSTO | NE GROUP ADVERTI | SING | | Receipt Status No | t Recvd | | | | | |
| | | KwolekEll | Q DOT-Kwol | | | *Di | spatch Method Pri | int 🗸 | E | ispatch | | | |
| | PO Reference | | | | | Amount Summa | гу 🕐 | | | | | | |
| | | Header Details | Activity Su | mmarv | | | Merchandise | 838.46 | USD | | | | |
| | | PO Defaults | Edit Comm | | | Fr | eight/Tax/Misc. | 0.00 | C | alculate | | | |
| | | PO Activities | | o Comments | | | Total Amount | 838.46 | | | | | |
| | | Requisitions • Actions | Document | Status | | | prance Balance | 1,369.46 | | | | | |
| | | 101010 | | | | Obli | gation Amount | 838.46 | | | | | |
| ld Item | s From 👔 | | | | | Select Lines To D |)isplay 🕜 | | | | | | |
| | | Catalog | Item Searc | h | | Search for Lines | Line | Q To | Q | Retrieve | | | |
| | | Purchasing Kit | | | | | | | | | | | |
| nes 👔 | | | | | | | | Personaliz | e Find View | All 🖾 🔜 | First | 1-2 of 2 | 🕑 Las |
| etails | Ship To/Due | Date <u>S</u> tatuses | Item Information | Attributes RFQ | <u>C</u> 0 | ntract <u>R</u> eceiving | | | | | | | |
| • | Item | | Description | | | PO Qty *UOM | Category | Price | Merchandi Amou | se int Status | | | |
| | | | To be published in th March 7 and 21, 201 | e Hartford Courant on 8 | E, | 1.0000 EA | 55000000 | 531.0000 | 531 | .00 Canceled | \bigcirc | 2 | . |
| | | | To be published in th March 7 and 21, 201 | ne New London Day on 8 | Æ, | 1.0000 EA | 5500000 | 838.46000 | 838 | .46 Approved | Q | 2 | H . |
| ew Printa | able Version | | | | | *Go to N | fore | | ~ | | | | |
| | ovals | | | | | | | | | | | | |

Cancel a PO (No Activity ONLY)

This action WILL initiate a change order



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 <u>close</u> the line by reducing it to expenditures. (See Close a PO Line instructions, if so.)

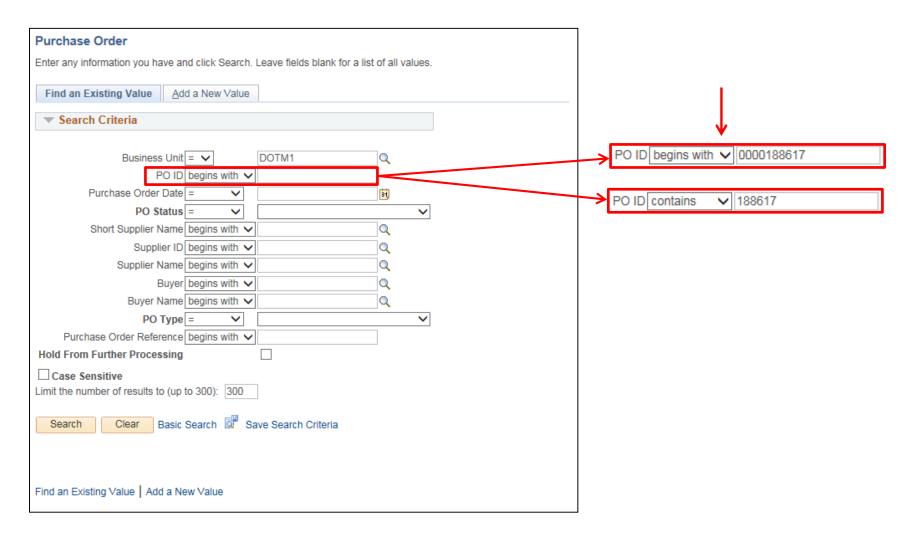
1. Navigate to 'Add/Update POs'.

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

| Purchase Order | |
|--|--|
| Eind an Existing Value Add a New Value | |
| Business Unit DOTM1 | |
| Add | |
| Find an Existing Value Add a New Value | |

- 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 v next to 'PO ID' to <u>contains</u>, and search by a section of the PO ID or exclude the leading zeros. (Example: 0000188617 or 188617) (Illustrated below)



- 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 = V DOTM1 |
| PO ID contains V 188617 |
| Purchase Order Date = V |
| PO Status = V |
| Short Supplier Name begins with V |
| Supplier ID begins with 🗸 |
| Supplier Name begins with 🗸 |
| Buyer begins with 🗸 |
| Buyer Name begins with 🗸 |
| PO Type = V |
| Purchase Order Reference begins with V |
| Hold From Further Processing |
| |
| Limit the number of results to (up to 300): 300 |
| Search Clear Basic 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 Kwolek Ell DOT-Kwolek Ellen S General (blank) N |
| |
| Find an Existing Value Add a New Value |

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

7. Click the red X in the top right corner of the PO main page. \times

| Maintain Purchase Order | | | | | | | | | | | | | |
|---|--|----------|----------------------------------|--|------------------------------|----------------------------------|----------|-------------------|----------|-------|------------|----------|---|
| Purchase Order | | | | | | | - | | 1 | | | | |
| Business Unit DOTM1 PO ID 0000188617 | | | E | PO Status Sudget Status | | hed | Δ | × | J | | | | |
| Copy From | Copy From 🗸 | | | | Hold From Further Processing | | | | | | | | |
| ▼ Header ② | | | | | | | | | | | | | |
| *PO Date 03/27/2018 | Supplier Search | | | Ooc Tol Status | | - I | | | | | | | |
| *Supplier 061422266F-001 | *Supplier 061422266F-001 Supplier Details | | | | Not Backordered | | Create B | | ackOrder | | | | |
| *Supplier ID 0000010578 | GRAYSTONE GROUP ADVERTIS | BING | | Receipt Status | | :vd | | Disp | atch | | | | |
| *Buyer KwolekEll | DOT-Kwolek Ellen S | Am | | patch Method | Email | ~ | | Diop | dtorr | | | | |
| PO Reference | | Am | ount Summar | | | | | | | | | | |
| Header Details PO Defaults | PO Defaults Edit Comments | | Merchandise Freight/Tax/Misc. | | | 1,369.46 0.00 | | Calculate | | | | | |
| PO Activities Requisitions Actions | Add ShipTo Comments Document Status | | | Total Amount rance Balance gation Amount | e | 1,369.46 1,369.46 1,369.46 | | | | | | | |
| Add Items From (?) | | Sele | ect Lines To D | isplay 👔 | | | | | | | | | |
| Catalog Purchasing Kit | Item Search | Sear | rch for Lines | Line | | 🔍 То | Q (| Ret | rieve | | | | |
| Lines ② Details Ship To/Due Date Statuses | Item Information Attributes RFQ | Contract | Receiving | | | Personalize | e Find | View All | 🛛 🔜 | First | ④ 1-2 of 2 | Last | t |
| | Description | | O Qty▲ *UOM | Category | | Price | Merc | handise Amount | Status | | | | |
| | To be published in the Hartford Courant on March 7 and 21, 2018 | E | 1.0000 EA | 55000000 | ٩ | 531.00000 | | 531.00 | Approved | Q | 2 | + | - |
| 2 | To be published in the New London Day on March 7 and 21, 2018 | E | 1.0000 EA | 55000000 | ٩ | 838.46000 | | 838.46 | Approved | Q | 2 | + | - |
| View Printable Version View Approvals | | | *Go to M | ore | | | ~ | | | | | | |

8. 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. |
| Yes No |

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

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