PO Change Orders

Core Support Training

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

Modify Price/Dollar Amount or Quantity

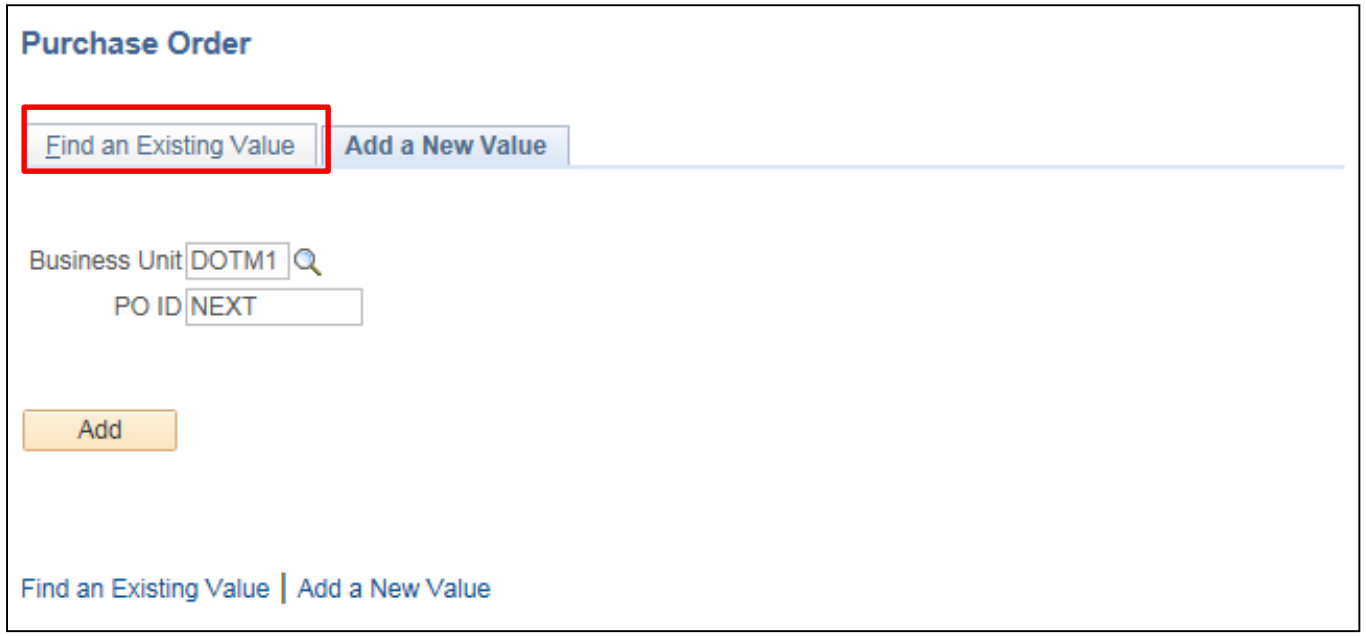
(This action WILL initiate a change order)

PO Change Orders: Modify Price or Quantity

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

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

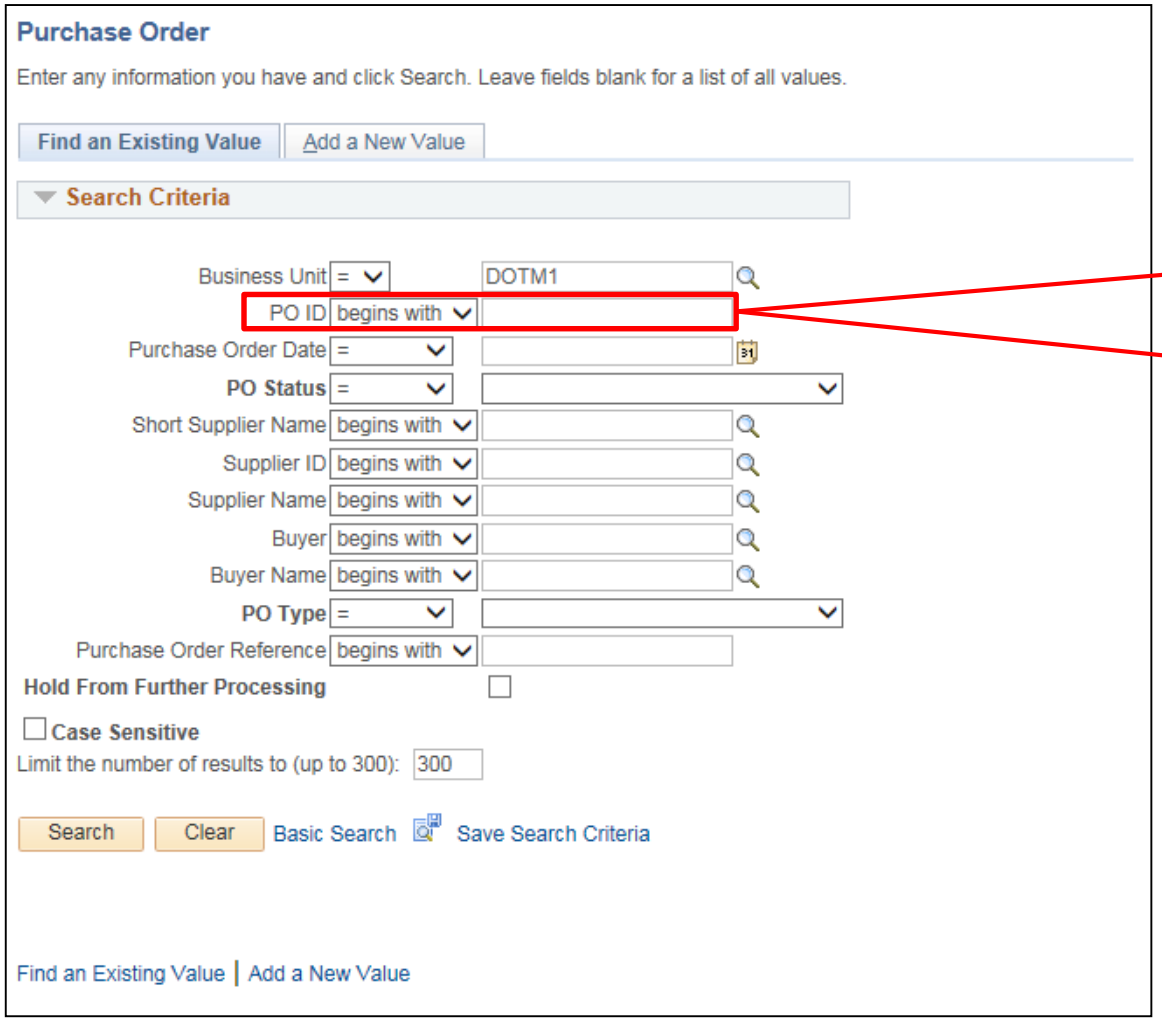
2. Select the **'Find an Existing Value'** tab.

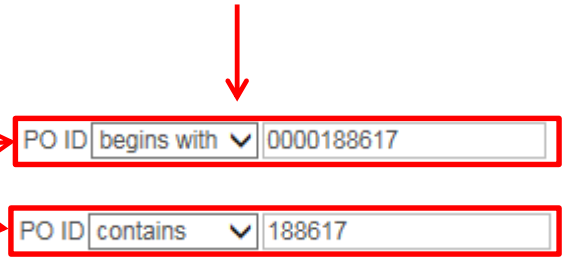


PO Change Orders: Modify Price or Quantity

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

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

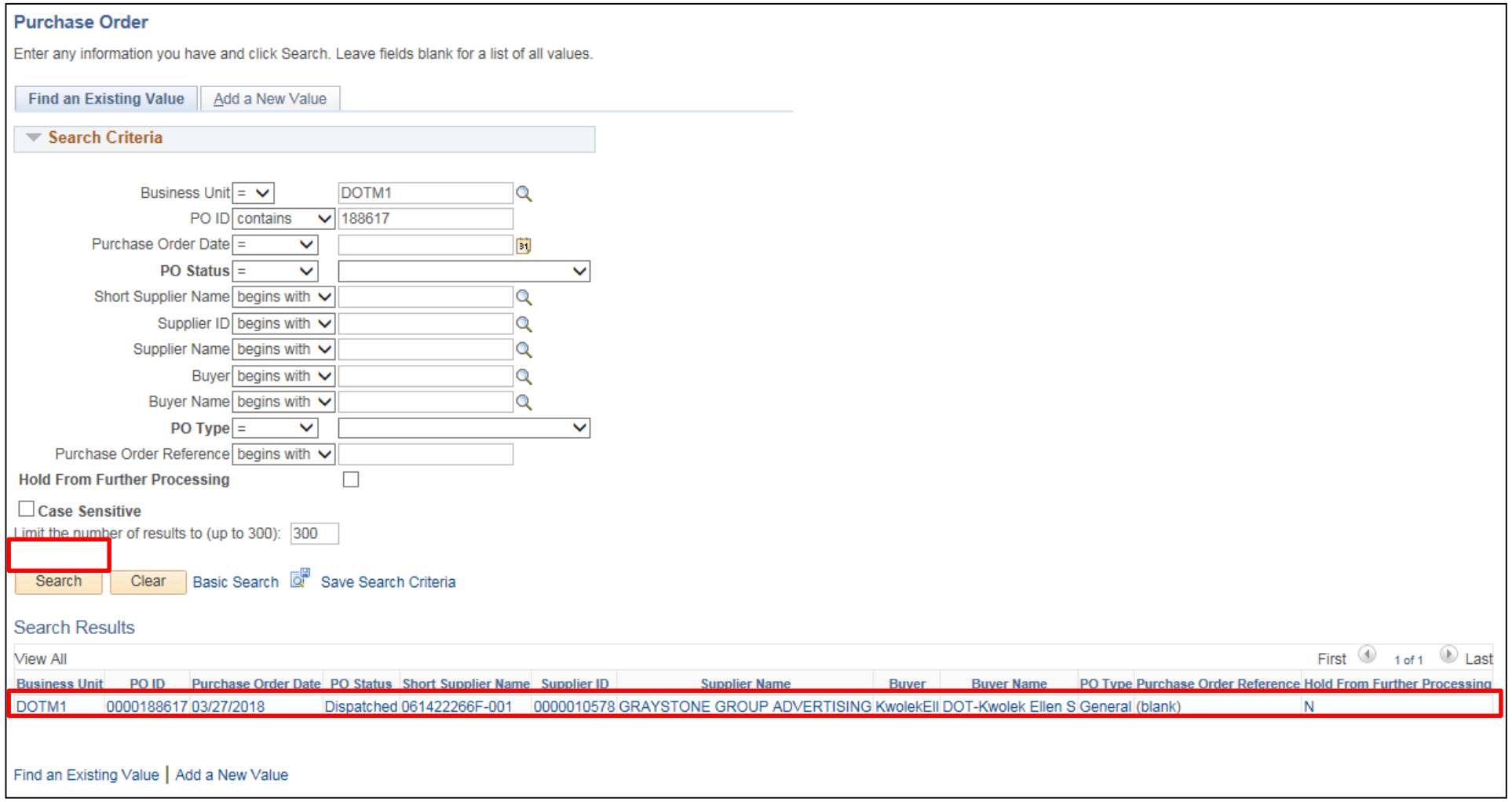




PO Change Orders: Modify Price or Quantity

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



PO Change Orders: Modify Price or Quantity

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

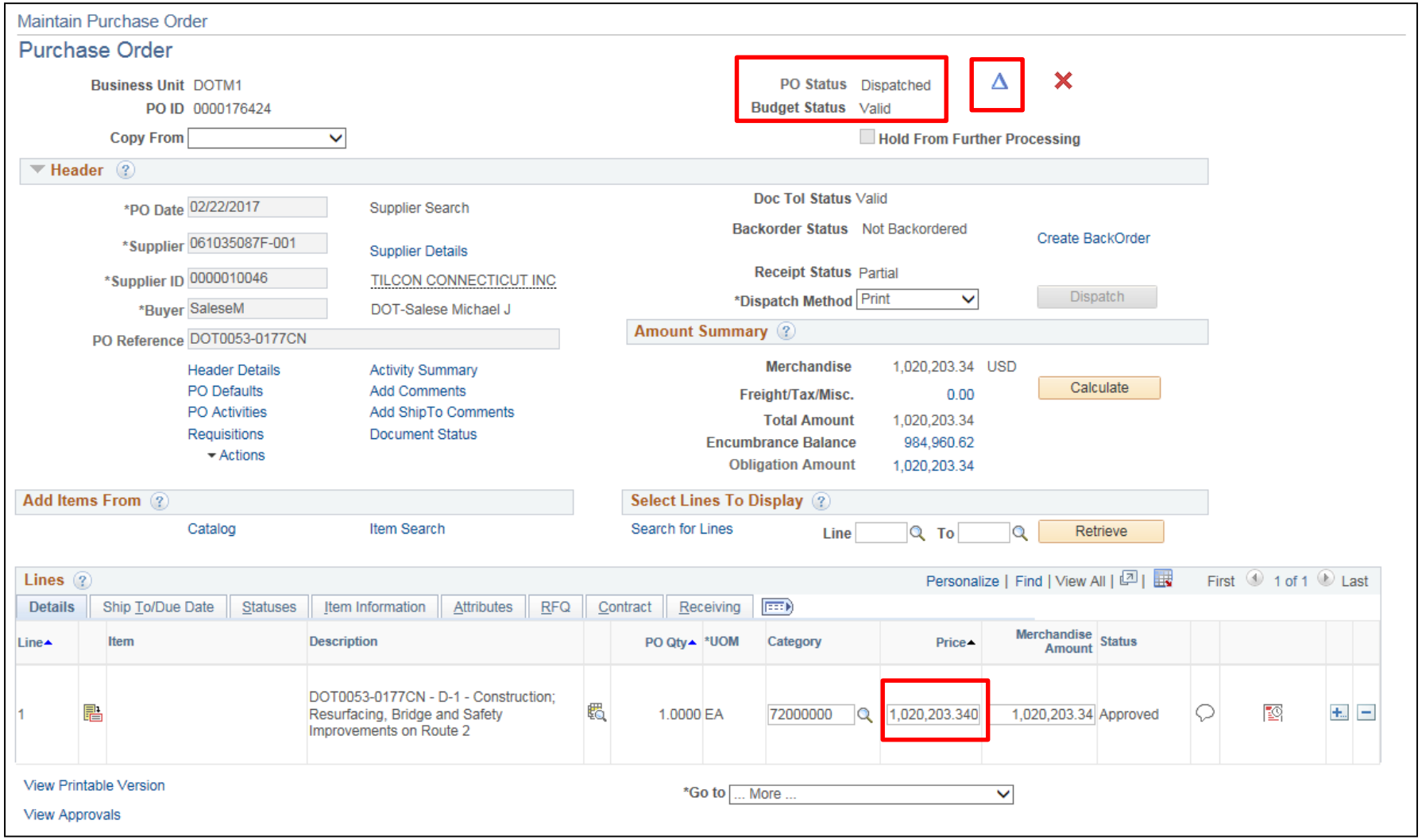
Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

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

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

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

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



PO Change Orders: Modify Price or Quantity

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

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

Maintain Purchase Order

Purchase Order

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

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

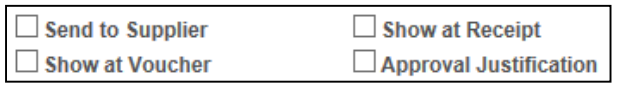
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the	1.0000	EA	55000000	525.00	531.00	Approved
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

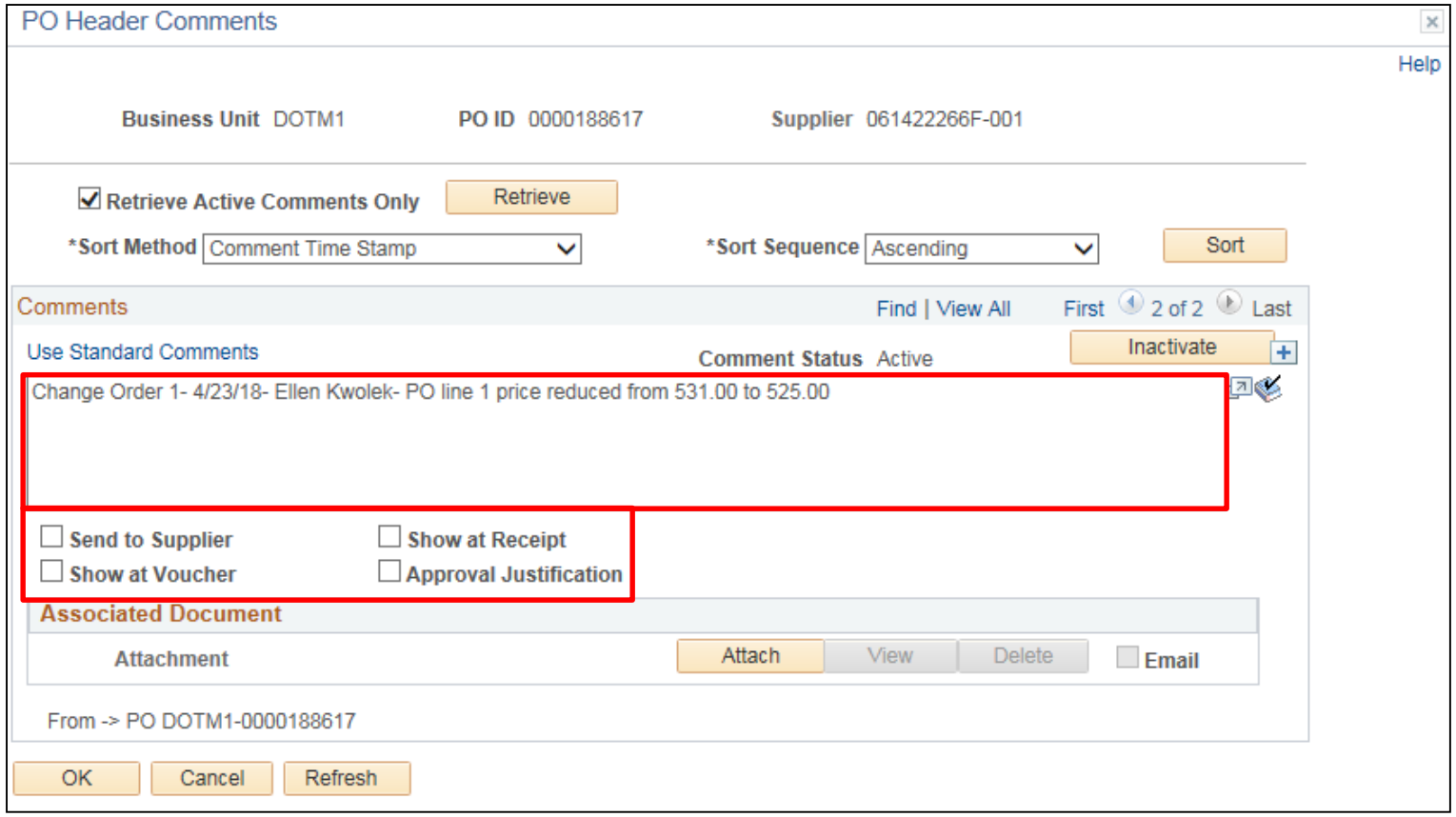
View Printable Version
View Approvals
*Go to ... More ...

PO Change Orders: Modify Price or Quantity

11. Enter the change order comment in the **'Comments'** box shown below– Include further details, if necessary.
    Note: In addition to the header comment, you can also leave an individual line comment on a line by clicking the quote bubble located next to the **'Status'** field.

12. The checkboxes (below the comment box) allow buyers to share comments with the supplier, display on receipts, or display on a voucher. Check off any necessary boxes.





PO Change Order Form

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

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

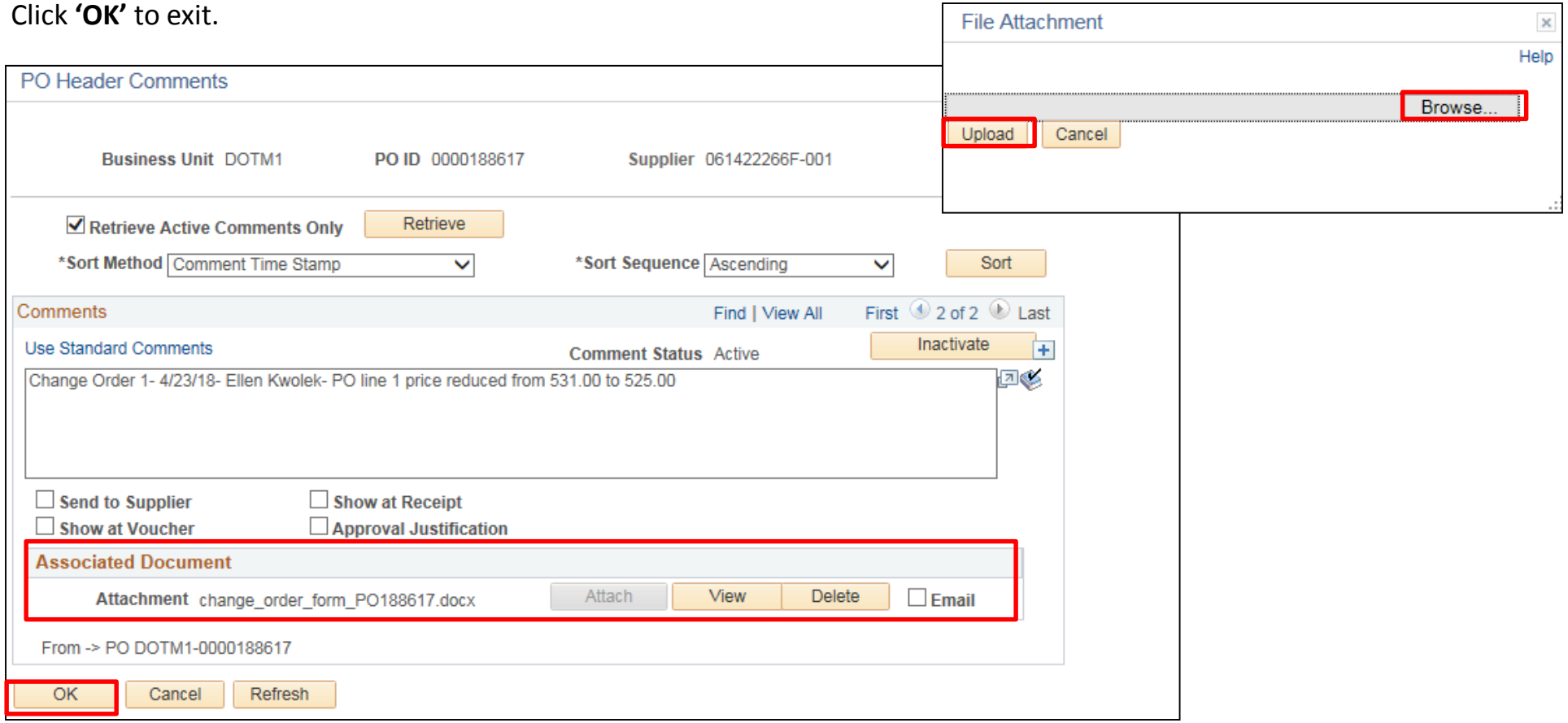
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

Change Order Request Form Revised 04/12/13

Change Order Request Form (SAMPLE)

PO Change Orders: Modify Price or Quantity

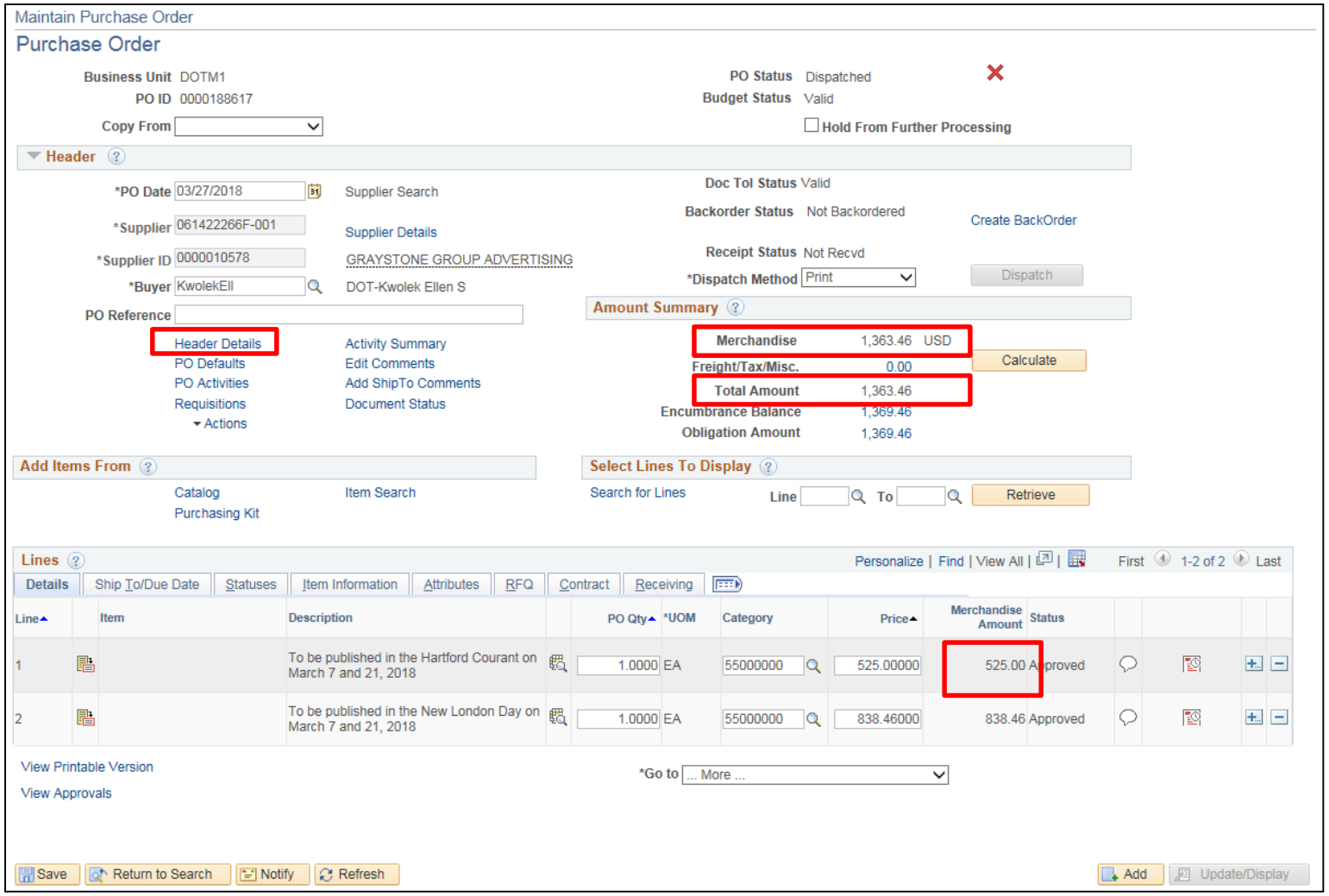
14. Complete the **Change Order Form** with the appropriate information.
15. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
16. Click the **'Attach'** button to attach the completed form to the change order comment. Attach
17. Click **'Browse'**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



PO Change Orders: Modify Price or Quantity

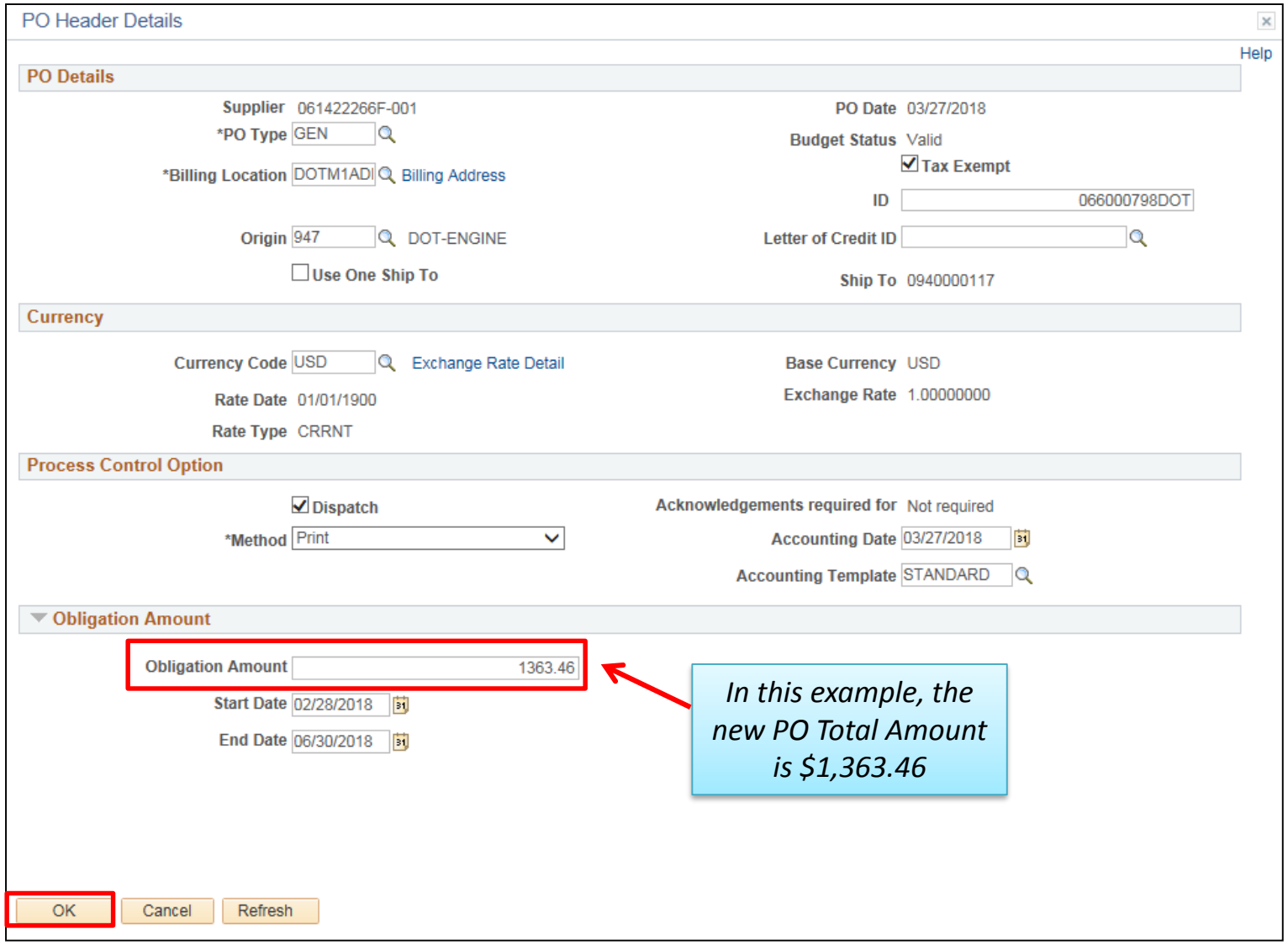
Below illustrates the PO after adjusting the price to $525.00. Notice the line 1 **'Merchandise Amount'** now reflects the change in Price, along with the PO **'Merchandise'** and **'Total Amount'** in **Amount Summary**.
The **'Encumbrance Balance'** will reflect the new amount once the PO has been re-approved.

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



PO Change Orders: Modify Price or Quantity

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



PO Change Orders: Modify Price or Quantity

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

PO Obligation is now updated.

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

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

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*Go to ... More ...

Save | Return to Search | Notify | Refresh | Add | Update/Display

PO Change Orders: Modify Price or Quantity

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From

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

Hold From Further Processing

Header

*PO Date 03/27/2018 Supplier Search
*Supplier 061422266F-001 Supplier Details
*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING
*Buyer KwolekEll DOT-Kwolek Ellen S
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Header Details | Activity Summary
PO Defaults | Edit Comments
PO Activities | Add ShipTo Comments
Requisitions | Document Status
Actions

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

Amount Summary

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

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

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

Modify Chartfield Coding

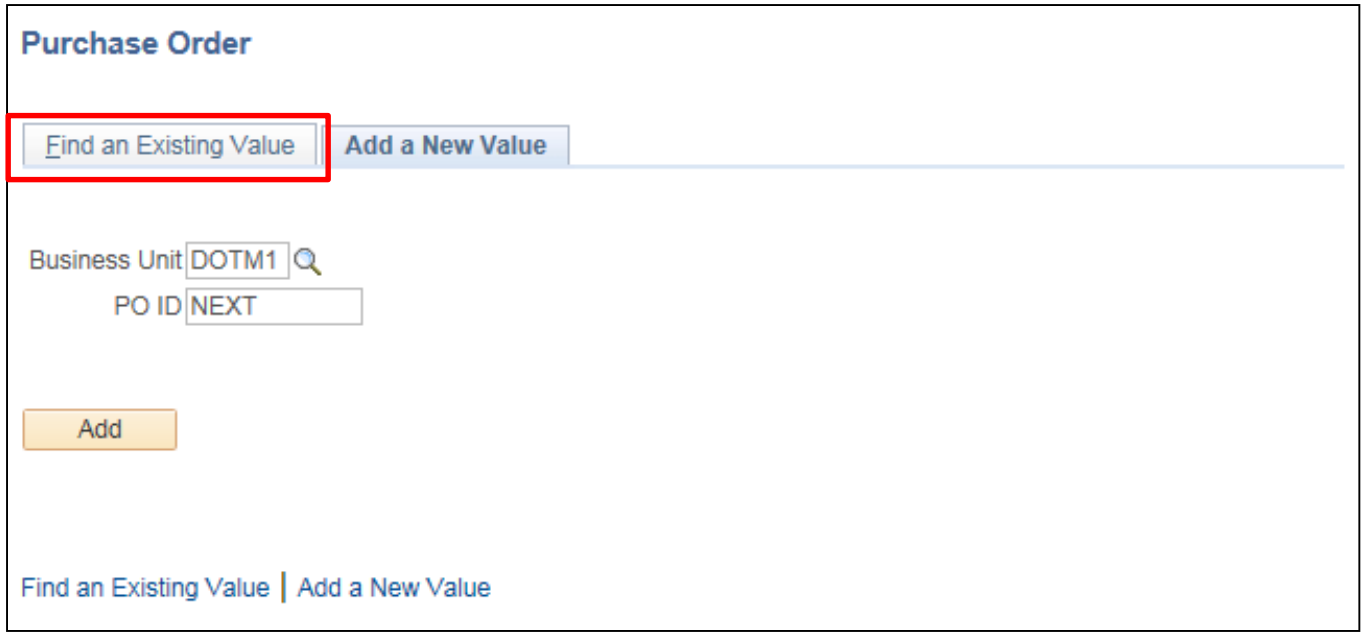
(This action does NOT initiate a change order)

PO Change Orders: Modify Chartfield Coding

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

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

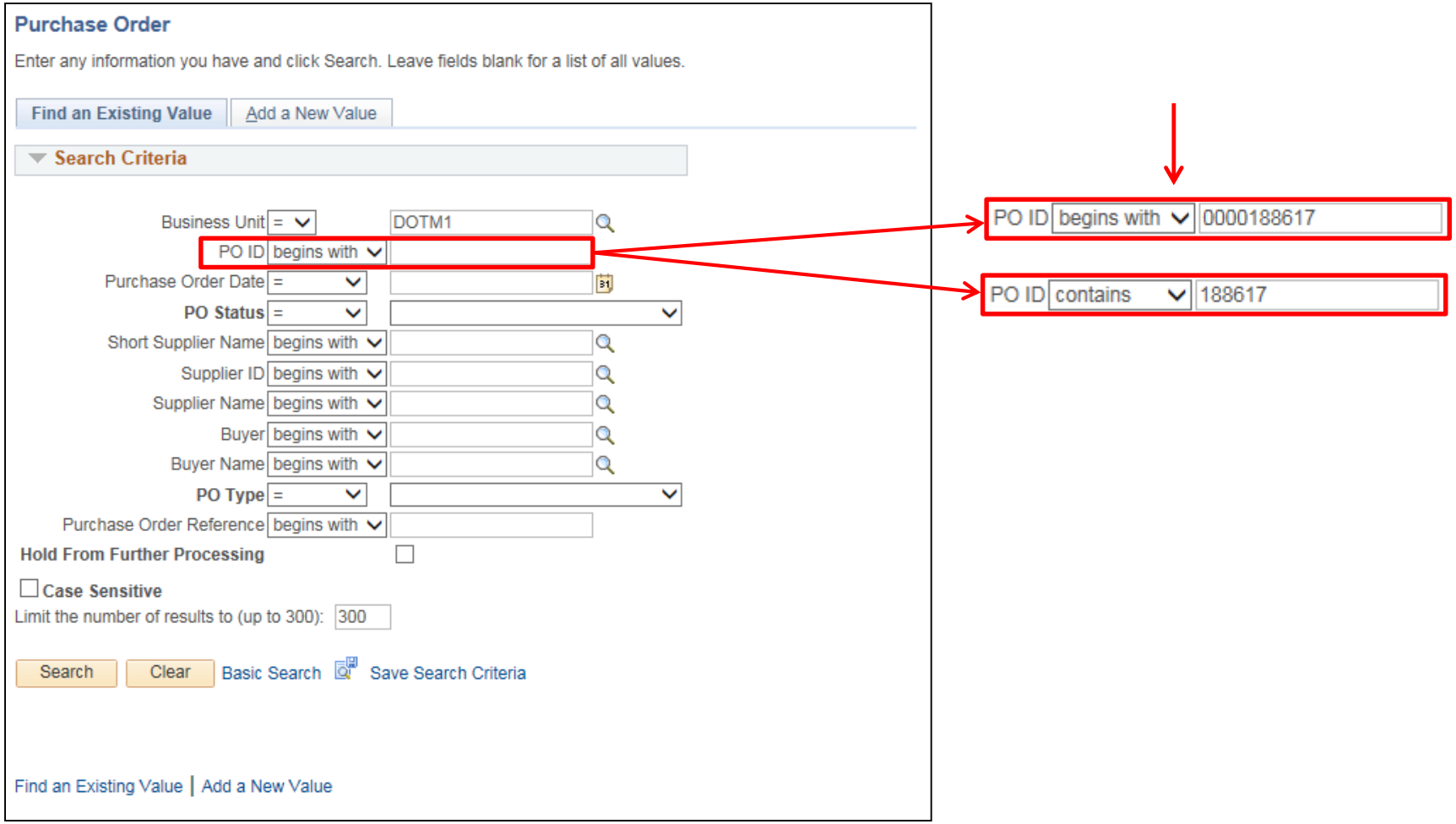
2. Select the **'Find an Existing Value'** tab.



PO Change Orders: Modify Chartfield Coding

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

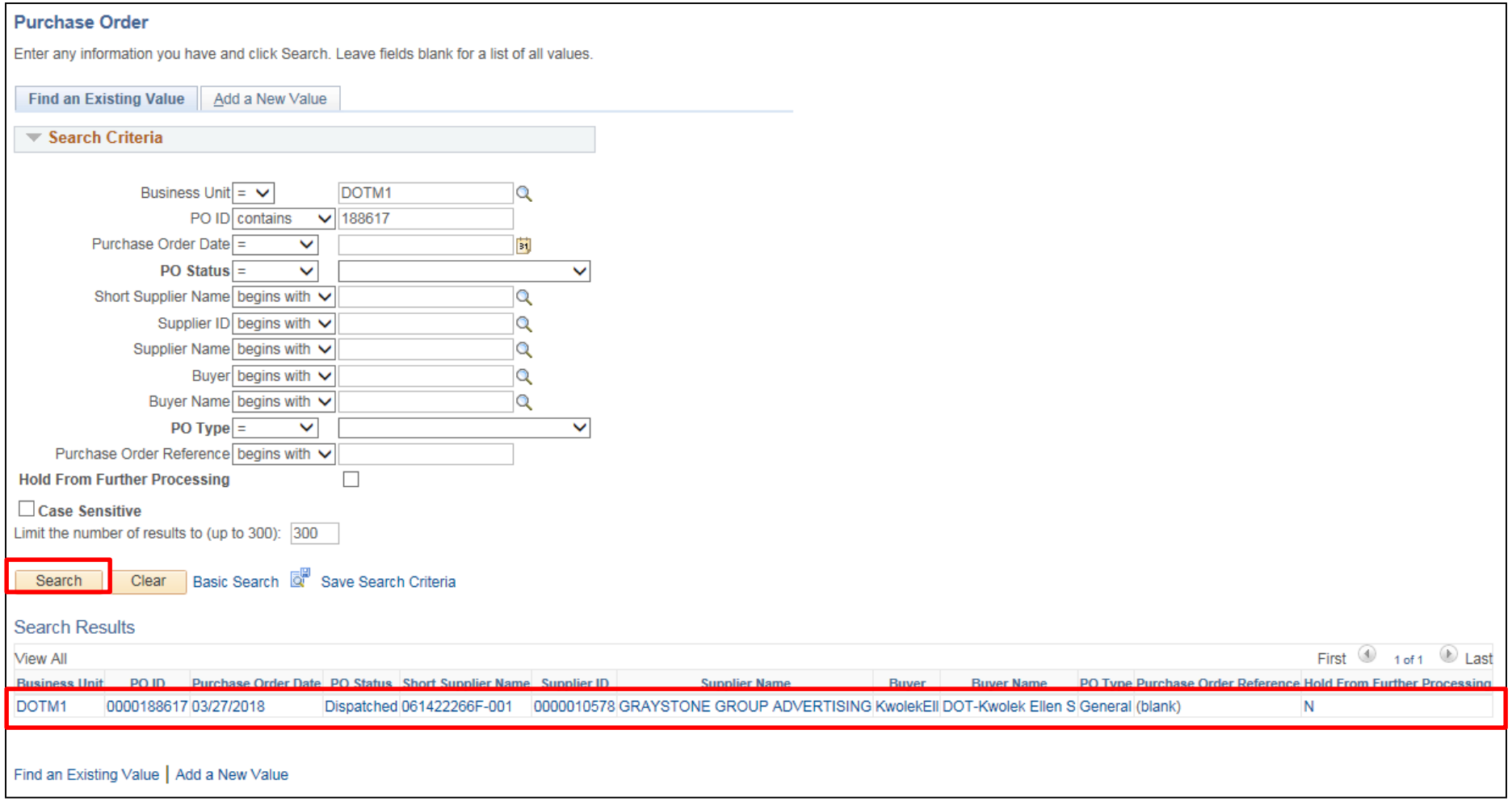
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000188617 or 188617)* *(Illustrated below)*



PO Change Orders: Modify Chartfield Coding

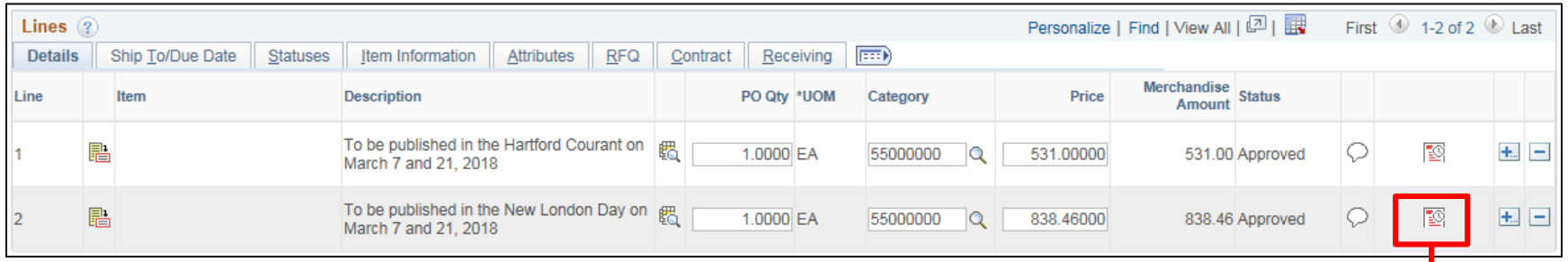
5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

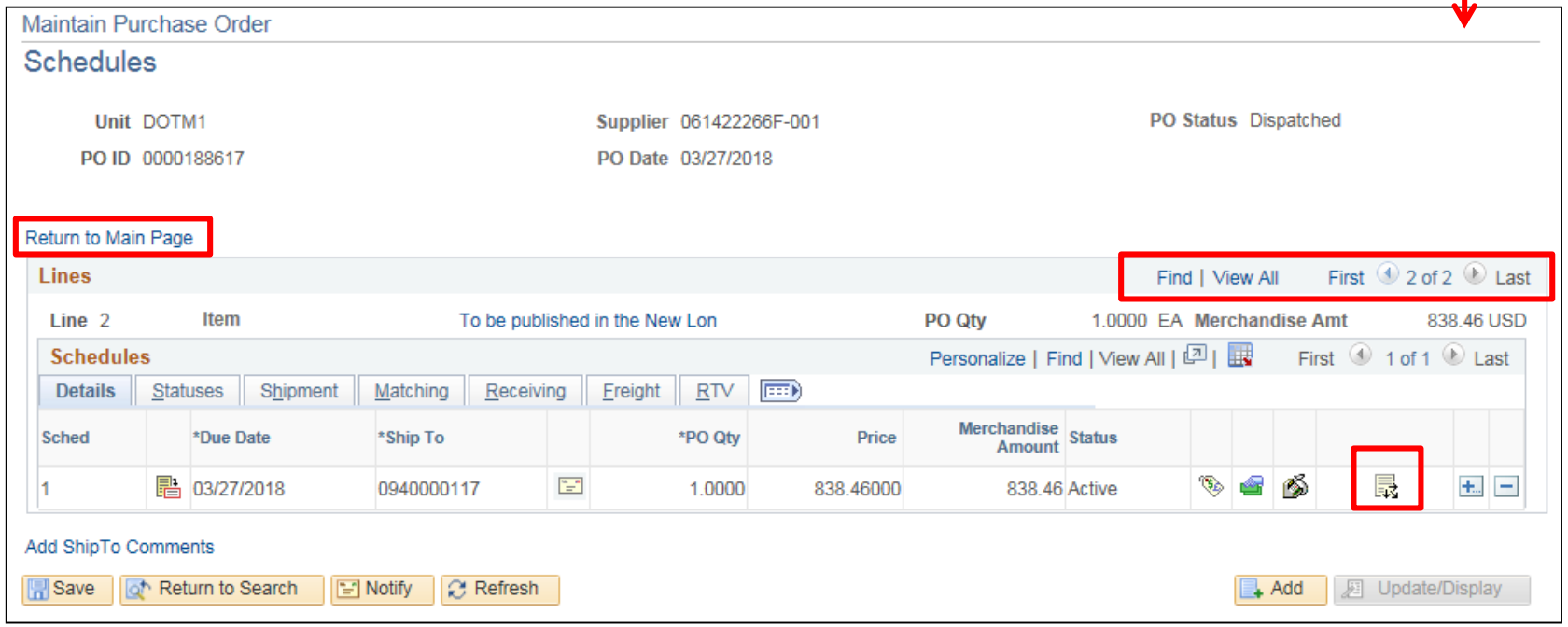
   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



PO Change Orders: Modify Chartfield Coding

7. Click the **'Schedule'** icon 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.

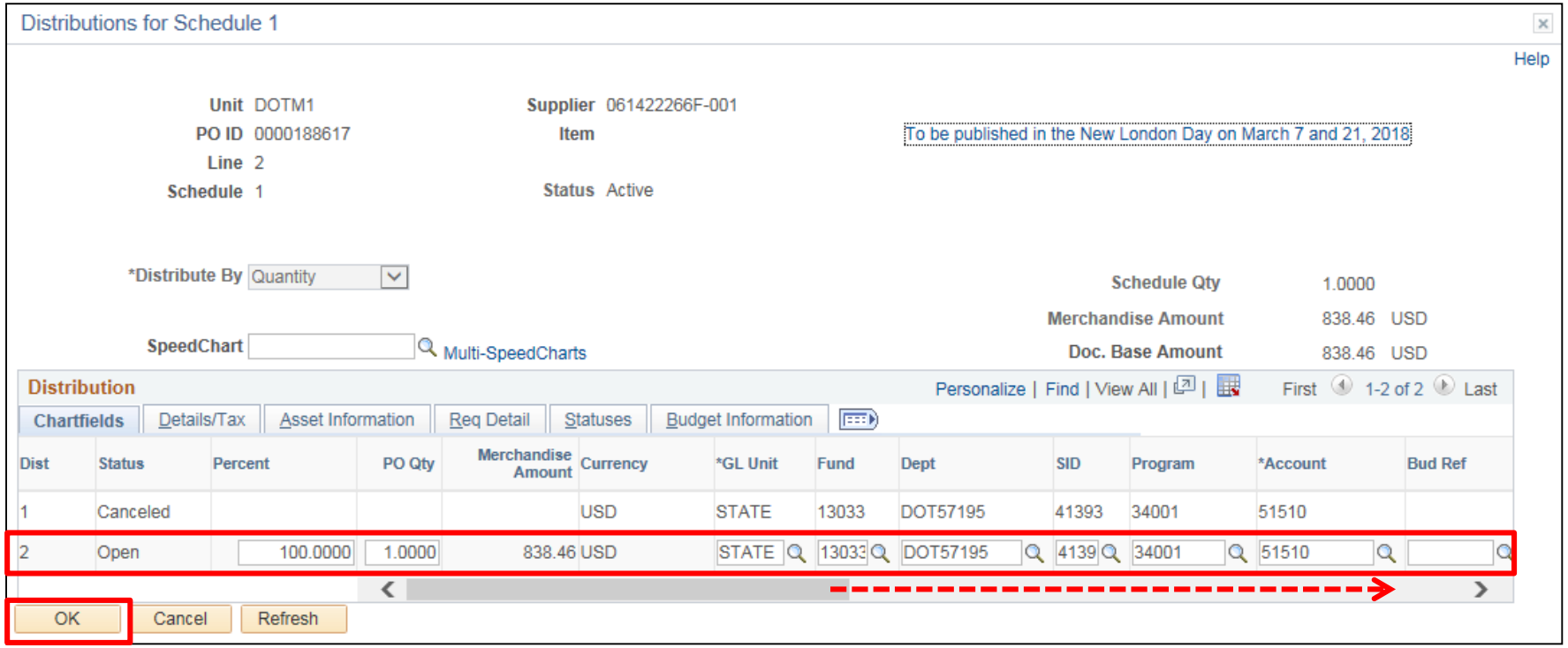




PO Change Orders: Modify Chartfield Coding

The **Schedule Distribution** will display.

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



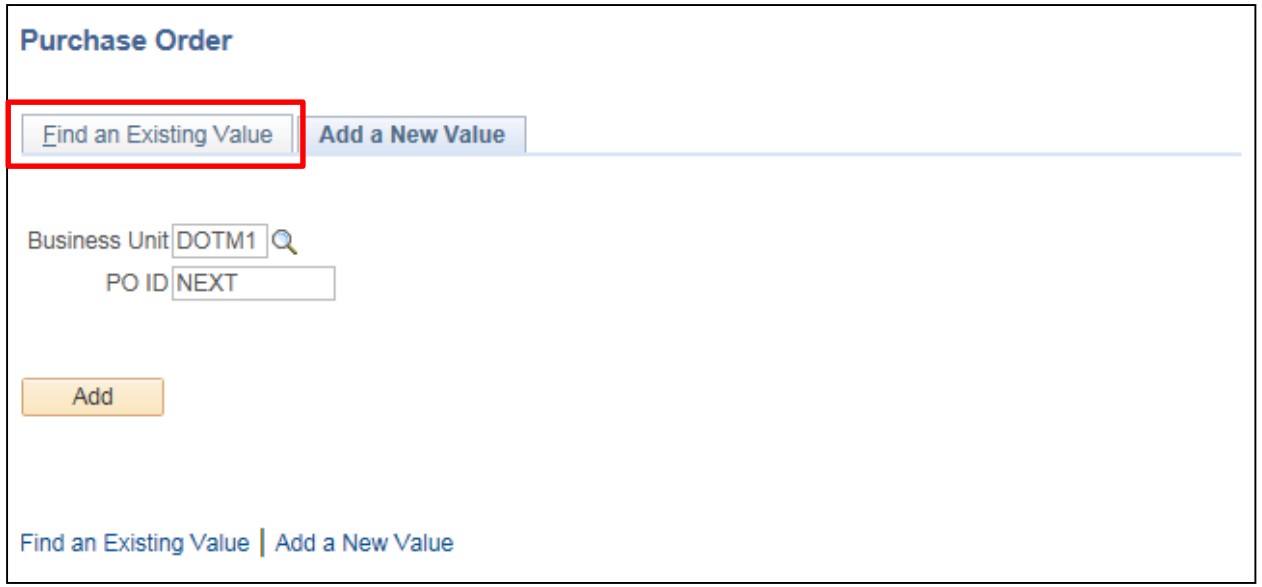
Modify a Contract

This action WILL initiate a change order

PO Change Orders: Modify a Contract

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

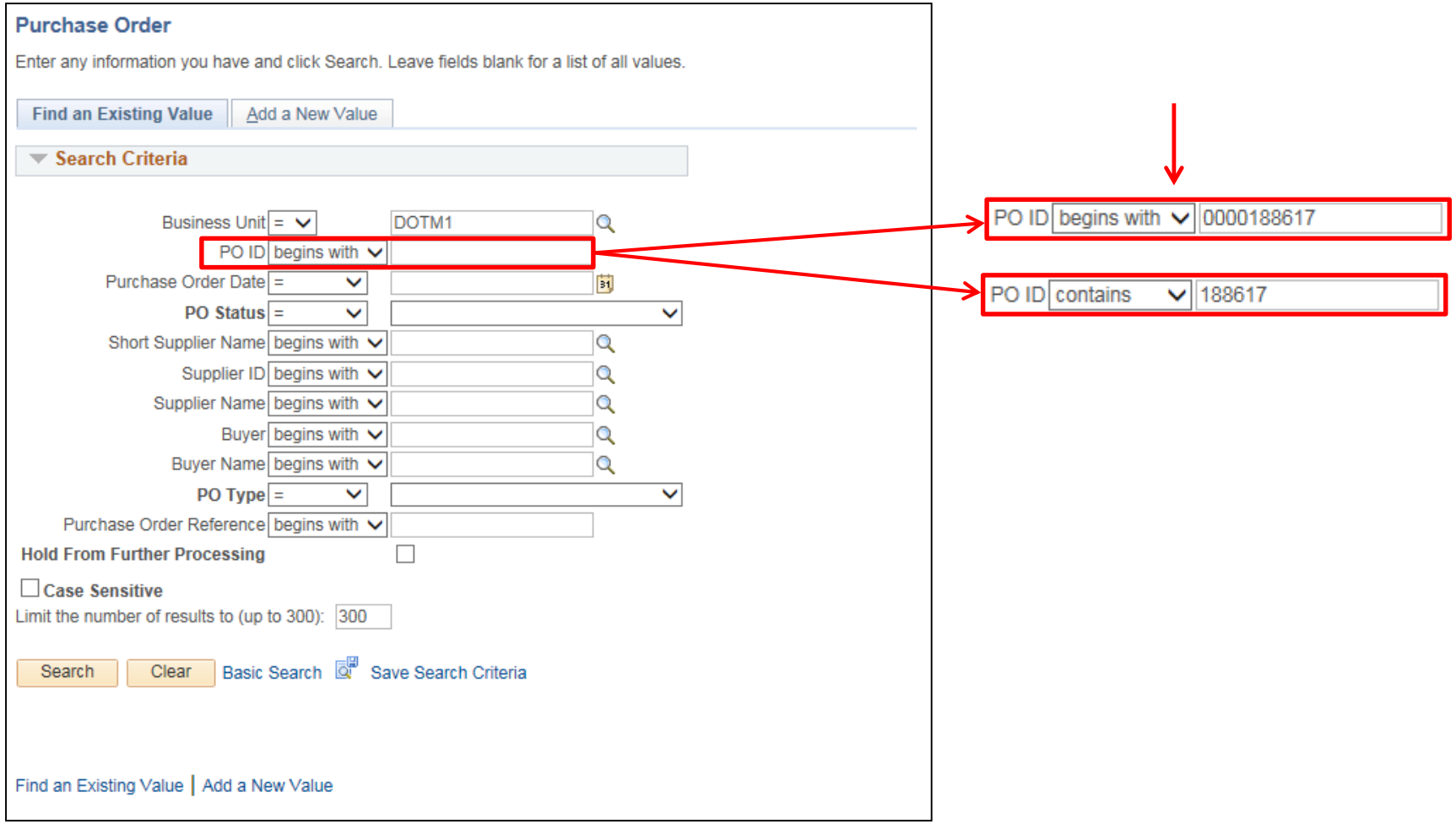
2. Select the **'Find an Existing Value'** tab.



PO Change Orders: Modify Contract

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

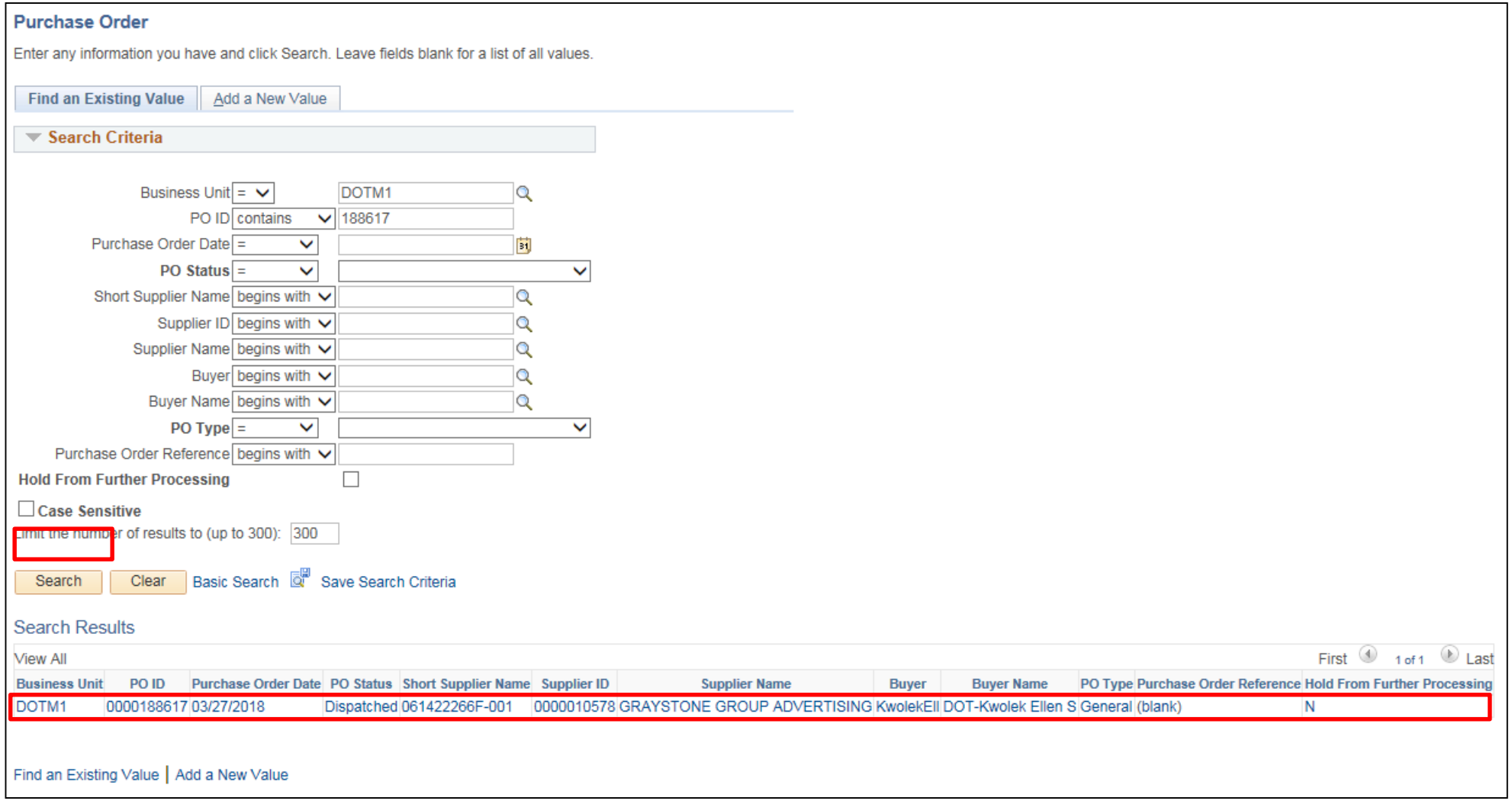
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000188617 or 188617)* *(Illustrated below)*



PO Change Orders: Modify Contract

5. Click **'Search'**
6. Click on the **'PO ID'** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



PO Change Orders: Modify Contract

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

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

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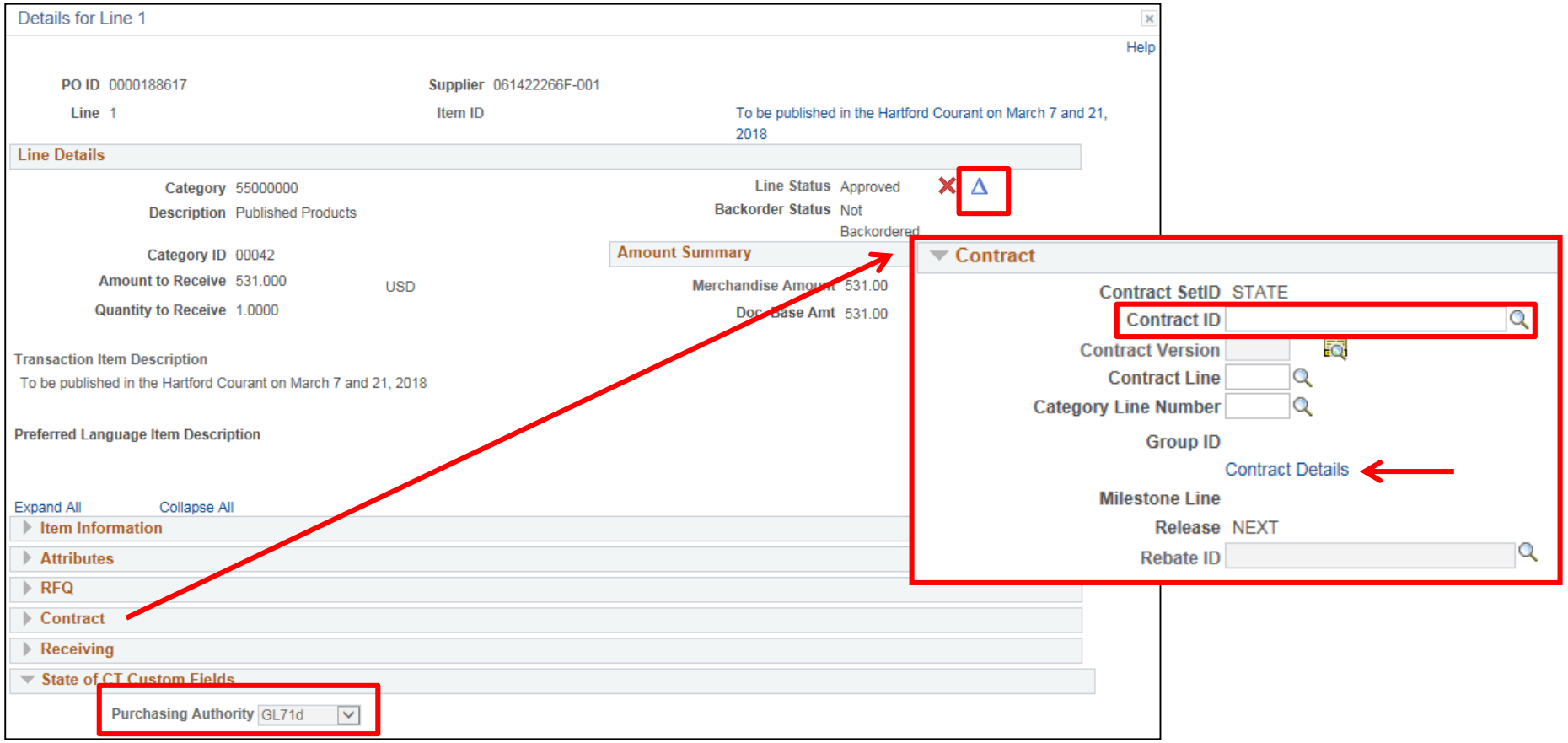
PO Change Orders: Modify Contract

8. Click on the change order icon **(blue triangle)** 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 to expand the **Contract** section, as shown below.
11. Enter the **'Contract ID'**. Or use the magnifying glass to search available contracts for your supplier. You can click the **'Contract Details'** link to view the contract information, if necessary.
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**.



PO Change Orders: Modify Contract

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From
PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

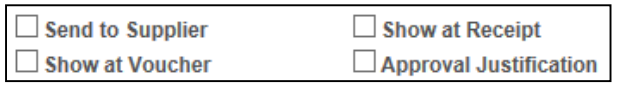
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the	1.0000	EA	55000000	531.00000	531.00	Approved
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

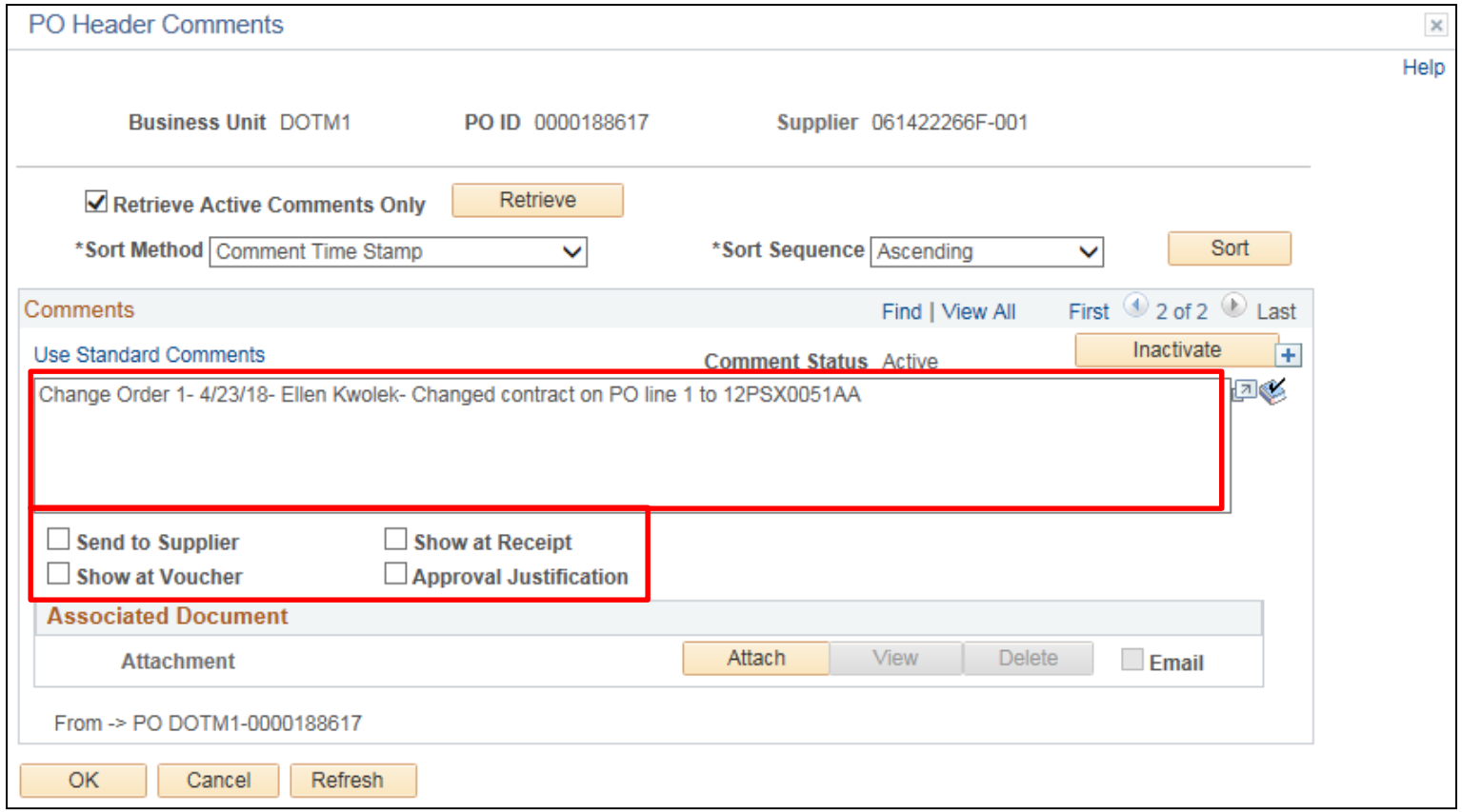
View Printable Version
View Approvals
*Go to ... More ...

PO Change Orders: Modify Contract

15. Enter the change order comment in the **'Comments'** box shown below– Include further details, if necessary.
    Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble located on each PO line next to the **'Status'** field.

16. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.





PO Change Order Form

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

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

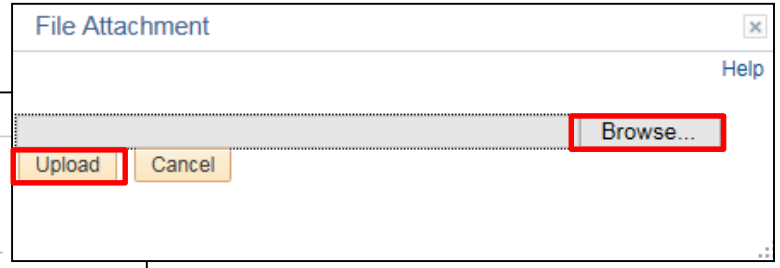
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

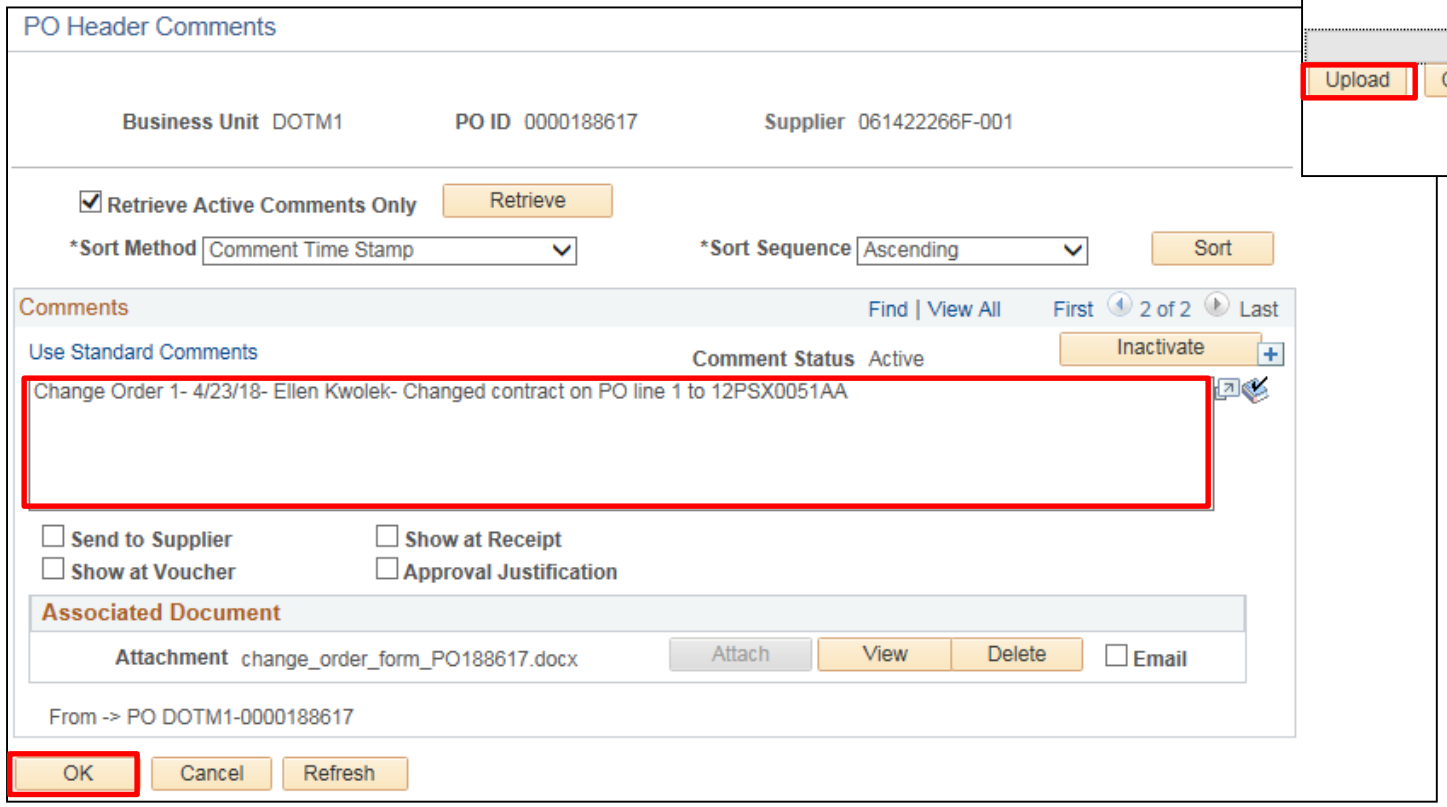
Change Order Request Form Revised 04/12/13

Change Order Request Form (SAMPLE)

PO Change Orders: Modify Contract

18. Complete the **Change Order Form** with the appropriate information.
19. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
20. Click the **'Attach'** button to attach the completed form to the change order comment. Attach
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. Save





PO Change Orders: Modify Contract

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From

PO Status: Pend Appr
Budget Status: Not Chk'd
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

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

Modify Unit of Measure

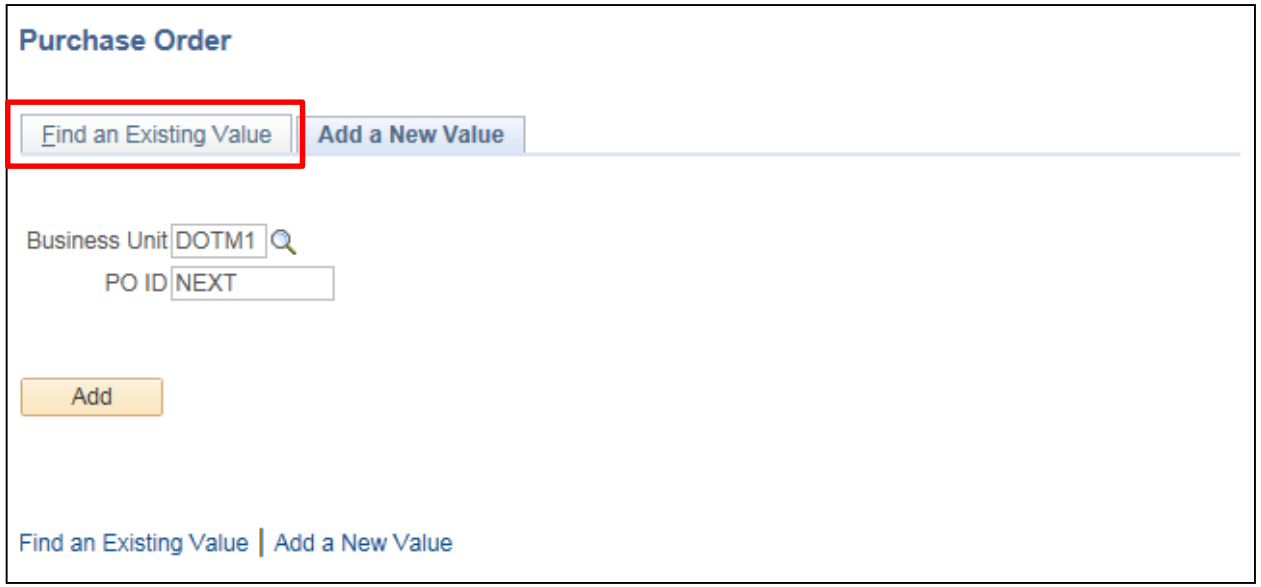
This action WILL initiate a change order

PO Change Orders: Modify Unit of Measure

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

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

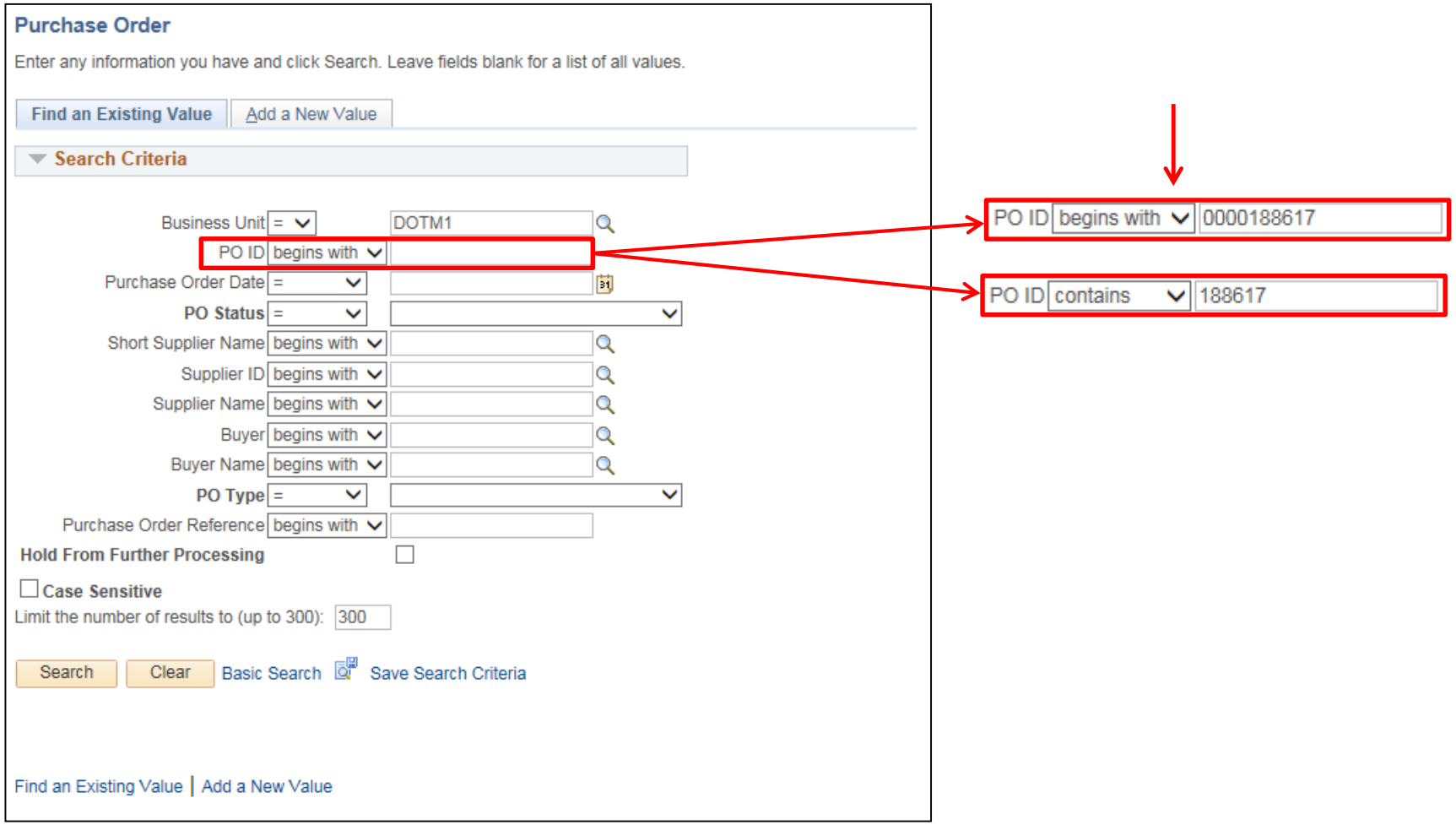
2. Select the **'Find an Existing Value'** tab.



PO Change Orders: Modify Unit of Measure

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

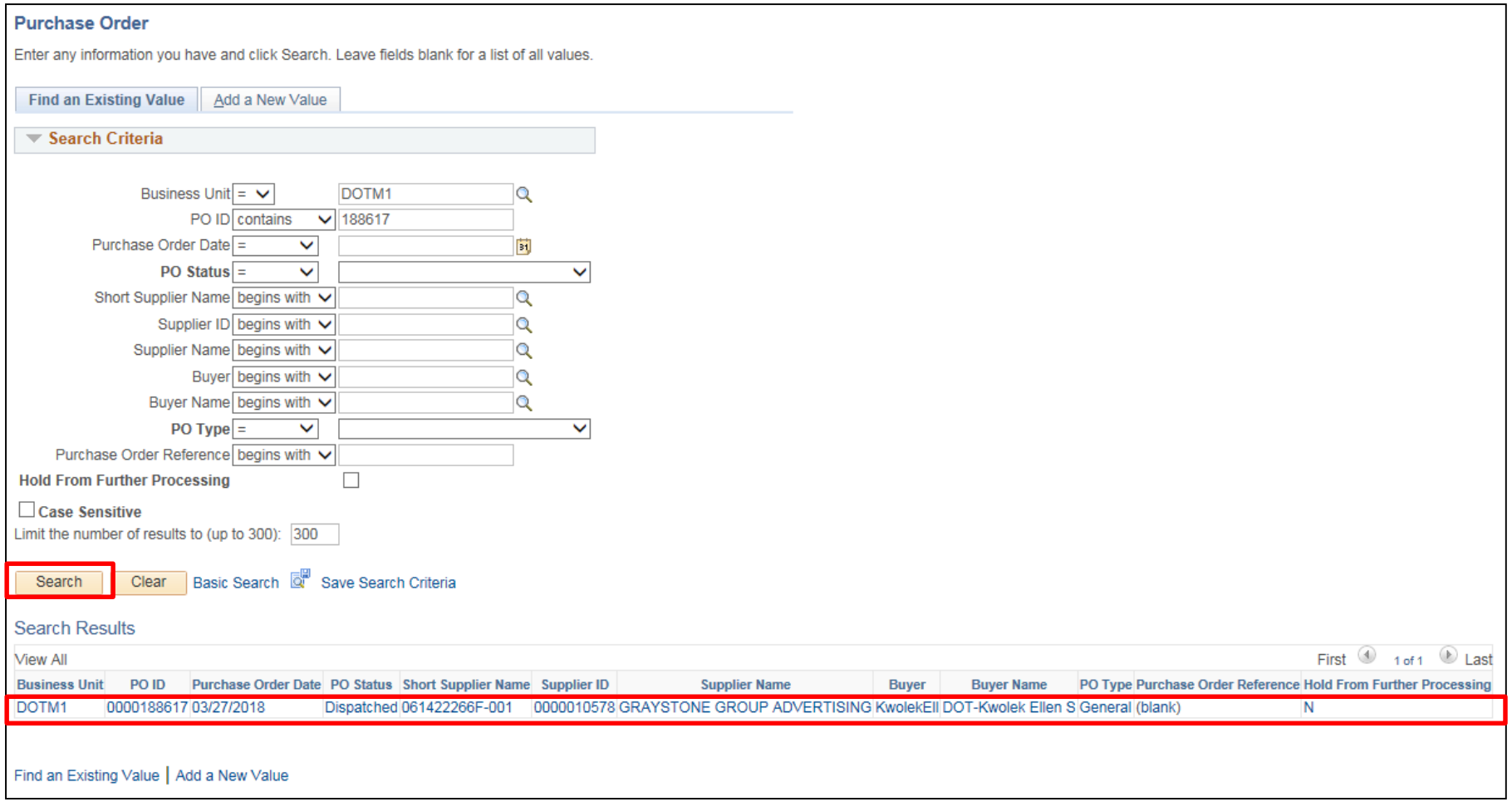
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000188617 or 188617)* *(Illustrated below)*



PO Change Orders: Modify Unit of Measure

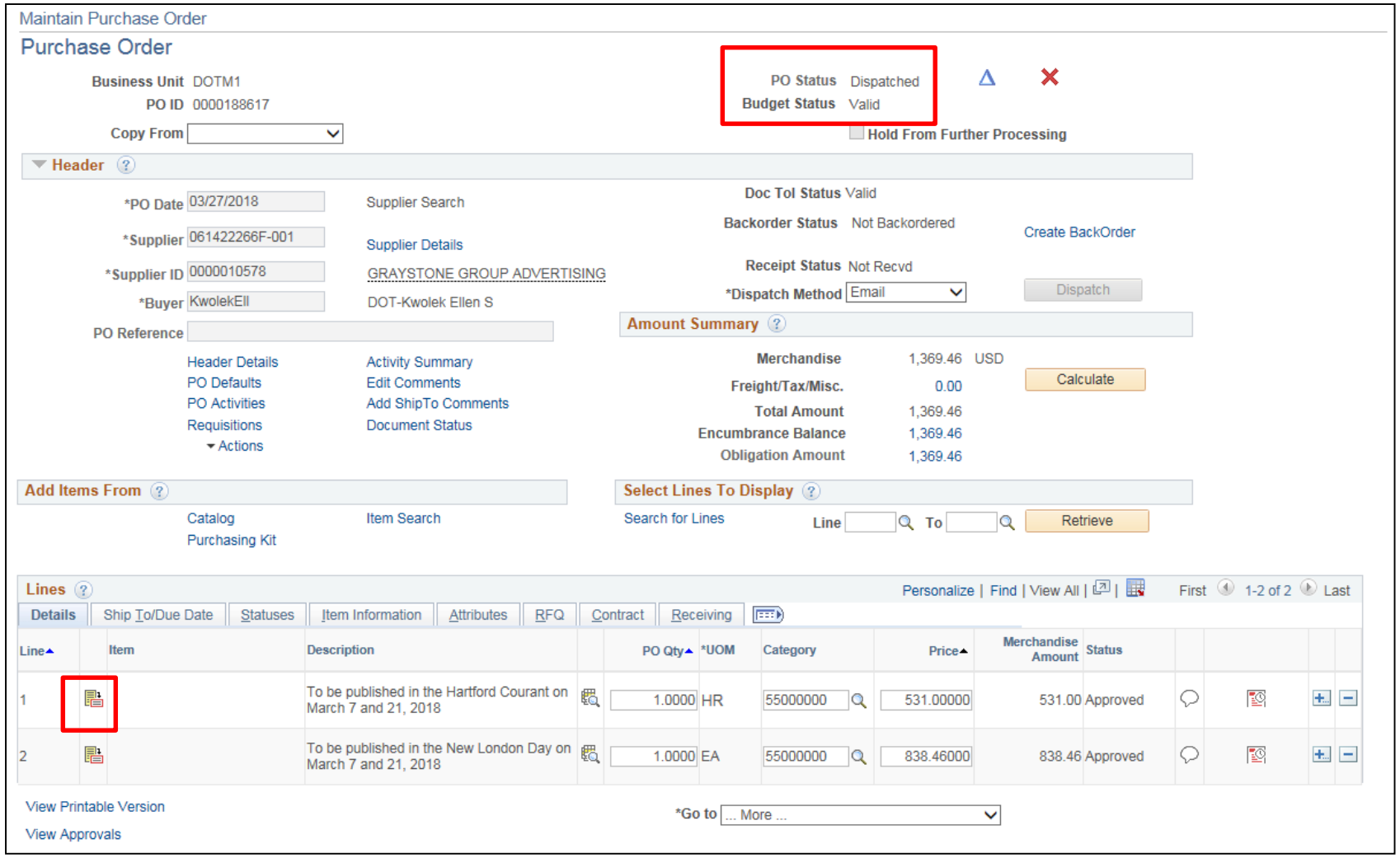
5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



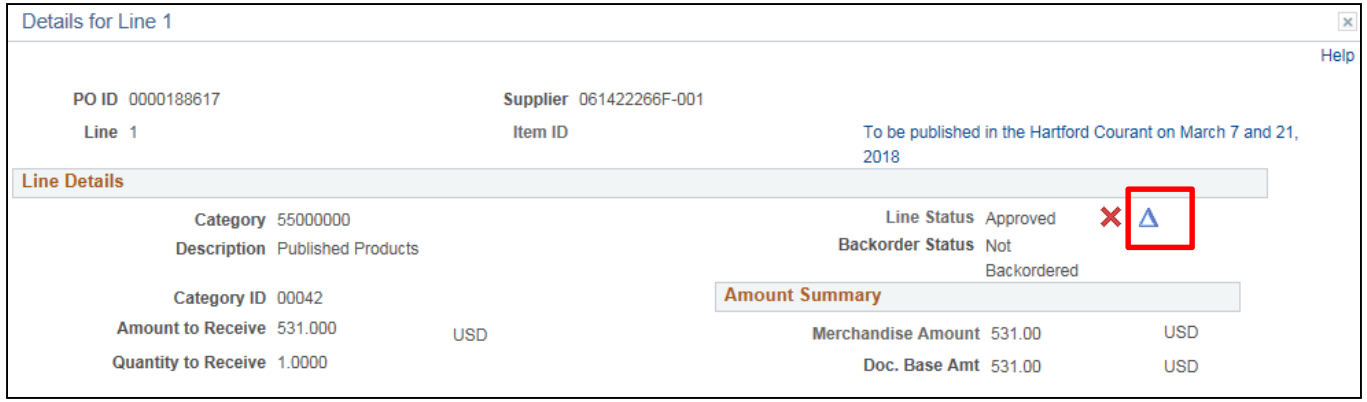
PO Change Orders: Modify Unit of Measure

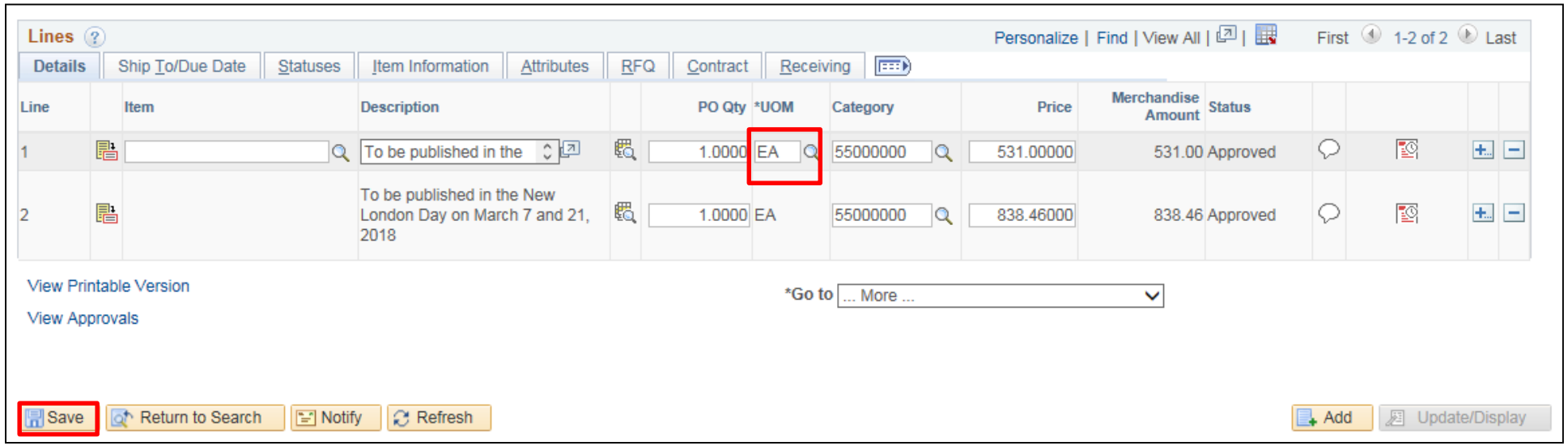
7. Click the **'Line Details'** icon on the PO line you would like to adjust.



PO Change Orders: Modify Unit of Measure

8. Click on the change order icon (**blue triangle**) at in top right corner of the **Line Details** page.
   The screen will exit back to the main page of the PO.
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)





PO Change Orders: Modify Unit of Measure

IMPORTANT NOTE

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

Message

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

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

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

OK

PO Change Orders: Modify Unit of Measure

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From
PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog
Purchasing Kit
Item Search

Select Lines To Display
Search for Lines Line To Retrieve

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

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

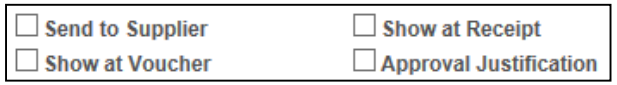
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the	1.0000	EA	55000000	531.00000	531.00	Approved
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

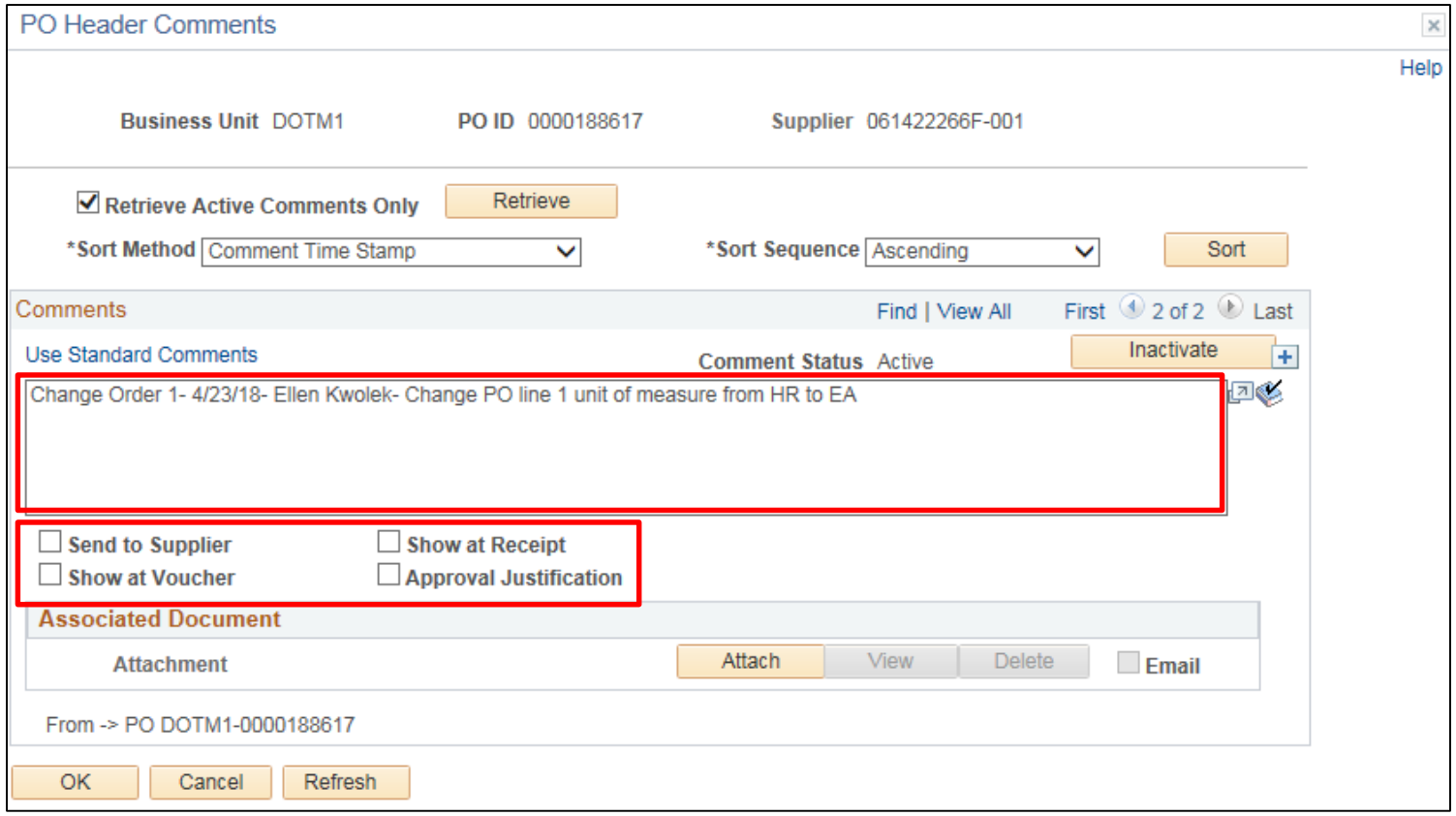
View Printable Version
View Approvals
*Go to ... More ...

PO Change Orders: Modify Unit of Measure

13. Enter the change order comment in the **'Comments'** box shown below– Include further details, if necessary.
    Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble located on each PO line next to the **'Status'** field.

14. The checkboxes (below the comment box) allow buyers to share comments with the supplier, display on receipts, or display on a voucher. Check off any necessary boxes.





PO Change Order Form

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

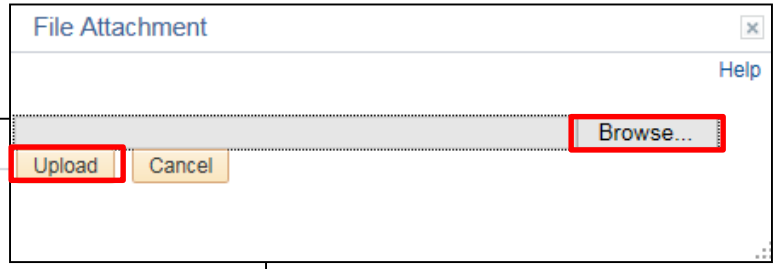
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

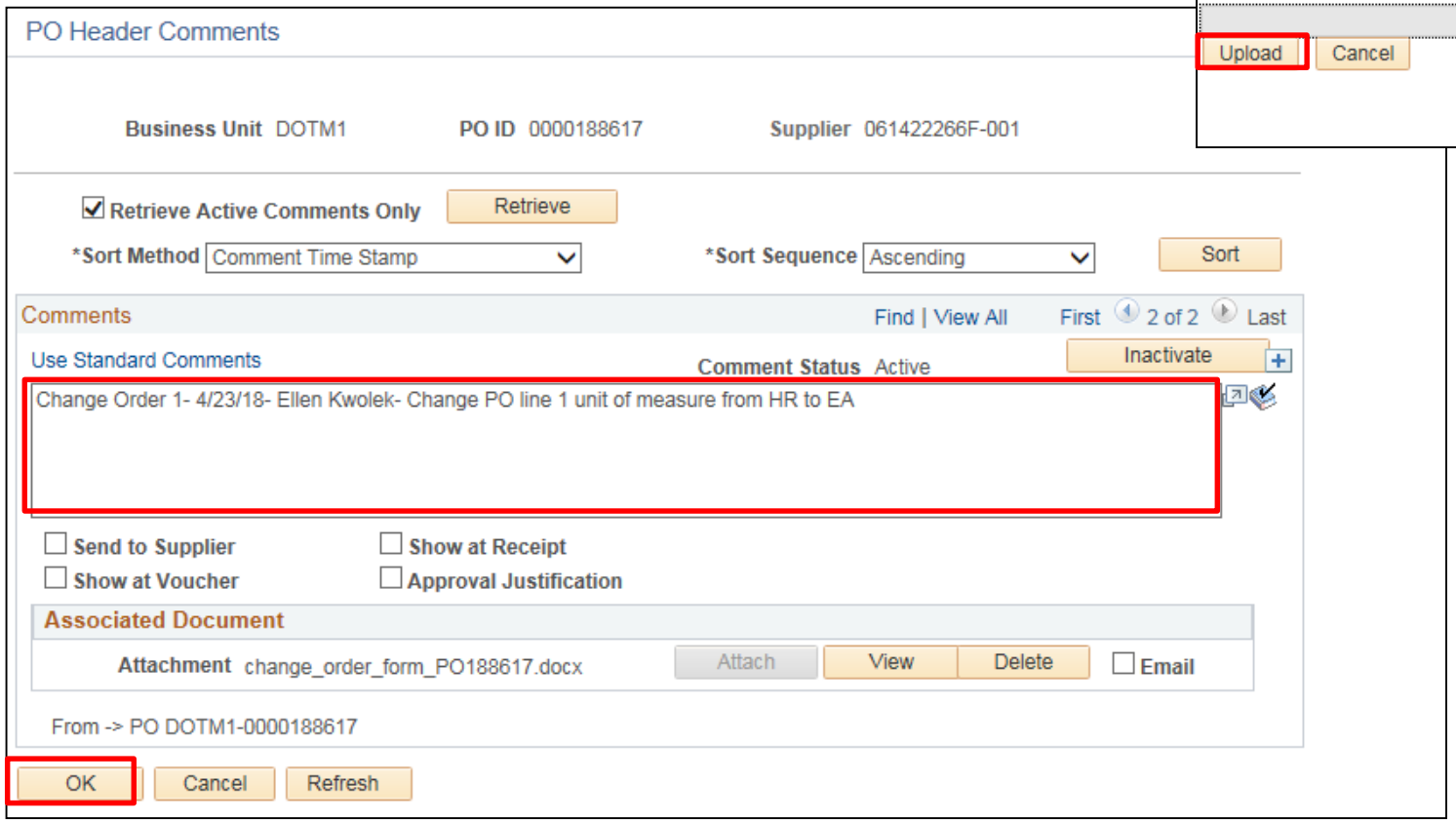
Change Order Request Form Revised 04/12/13

Change Order Request Form (SAMPLE)

PO Change Orders: Modify Unit of Measure

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





PO Change Orders: Modify Unit of Measure

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From

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

Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

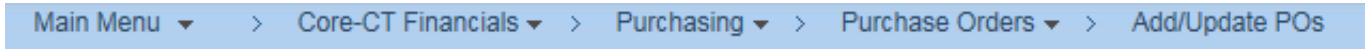
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Pending
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Pending

Change Line to ‘Amount Only’

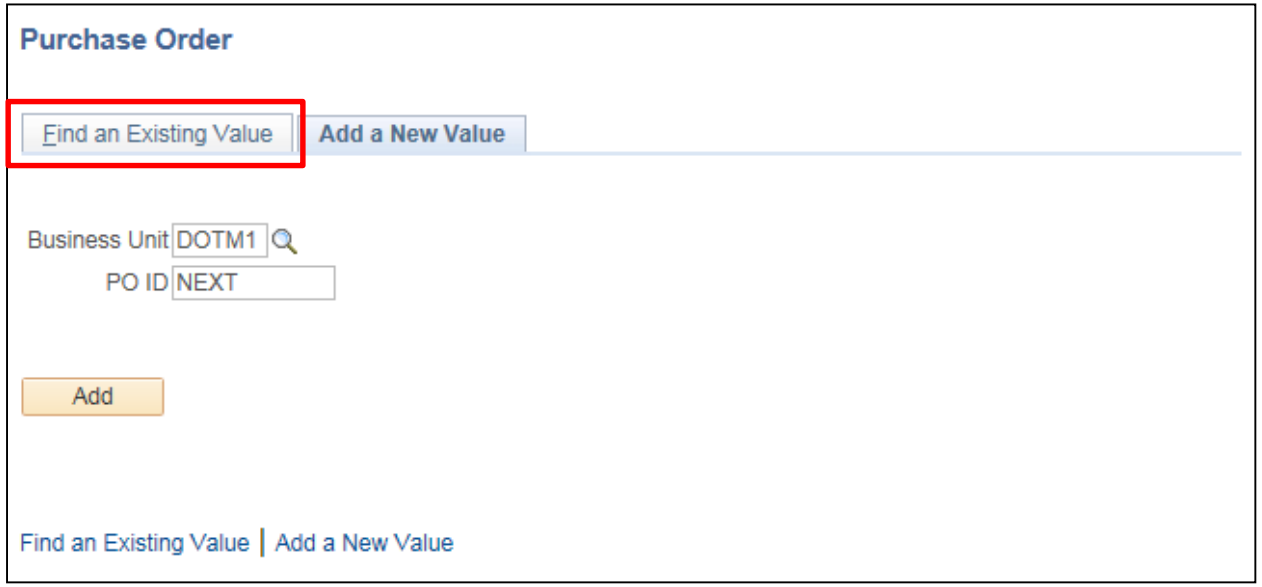
This action WILL initiate a change order

PO Change Orders: Change Line to ‘Amount ONLY’

1. Navigate to **‘Add/Update POs’**.



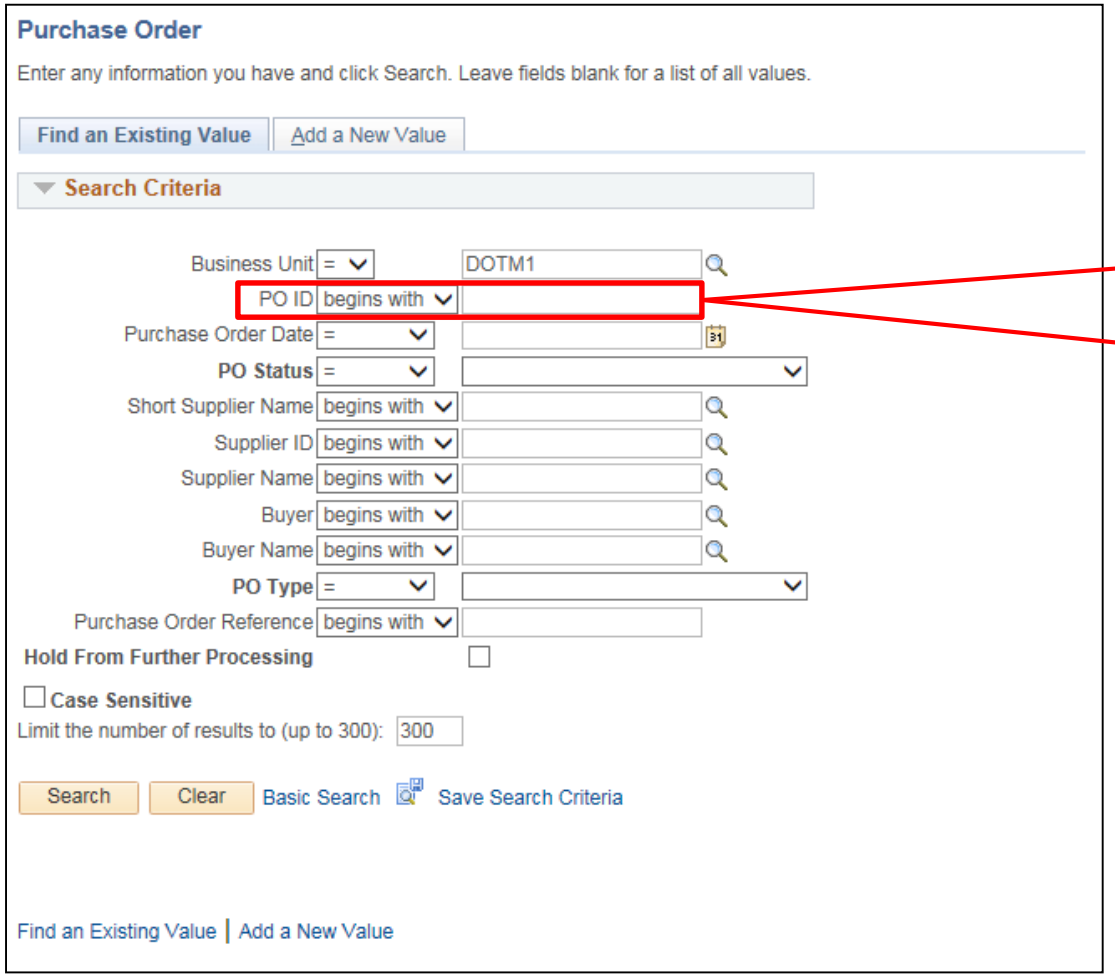
2. Select the **‘Find an Existing Value’** tab.

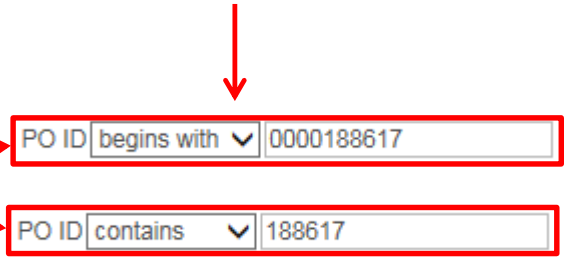


PO Change Orders: Change Line to ‘Amount ONLY’

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

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





PO Change Orders: Change Line to ‘Amount ONLY’

5. Click **‘Search’**.
6. Click on the **‘PO ID’** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

Purchase Order

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

Find an Existing Value | Add a New Value

Search Criteria

Business Unit	=	DOTM1
PO ID	contains	188617
Purchase Order Date	=	
PO Status	=	
Short Supplier Name	begins with	
Supplier ID	begins with	
Supplier Name	begins with	
Buyer	begins with	
Buyer Name	begins with	
PO Type	=	
Purchase Order Reference	begins with	
Hold From Further Processing		☐

☐ **Case Sensitive**

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

Search | Clear | Basic Search | Save Search Criteria

Search Results

View All — First 1 of 1 Last

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

Find an Existing Value | Add a New Value

PO Change Orders: Change Line to ‘Amount ONLY’

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched
Budget Status Valid

Hold From Further Processing

Header

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

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

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PO Defaults | Edit Comments
PO Activities | Add ShipTo Comments
Requisitions | Document Status
Actions

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Merchandise	1,369.46	USD
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Total Amount	1,369.46	
Encumbrance Balance	1,369.46	
Obligation Amount	1,369.46	

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

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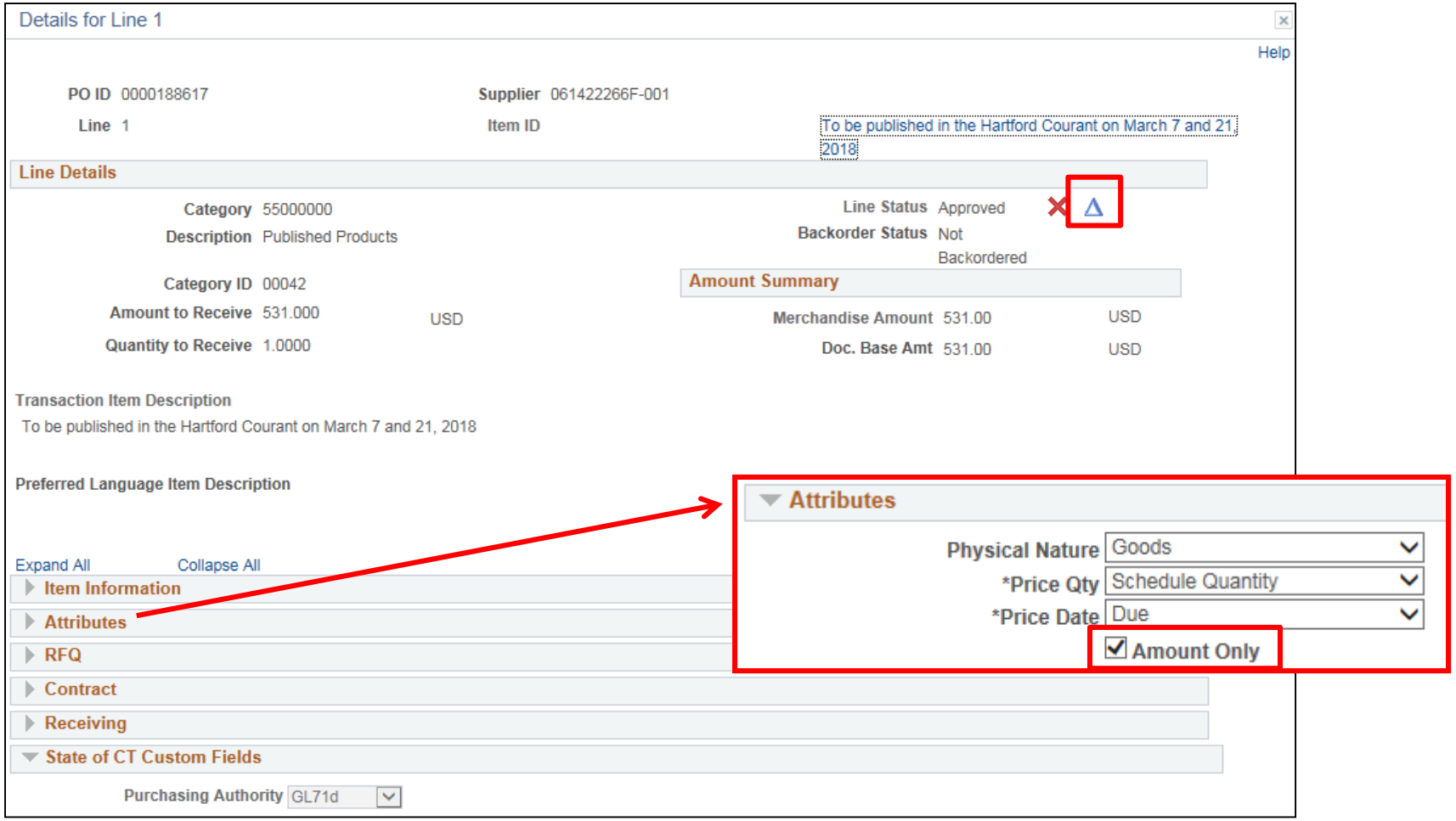
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

View Printable Version
View Approvals

*Go to ... More ...

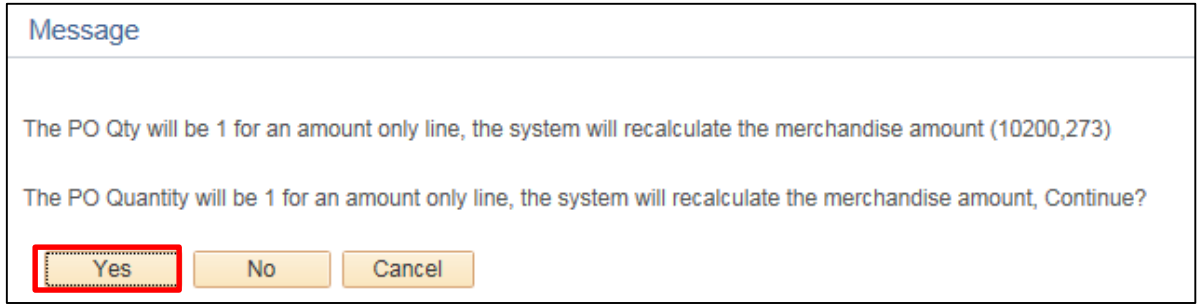
PO Change Orders: Change Line to ‘Amount ONLY’

8. Click on the **Line Details** icon on the line you would like adjust.
9. Click the blue triangle change icon in the top right corner.
10. Click the gray arrow 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.

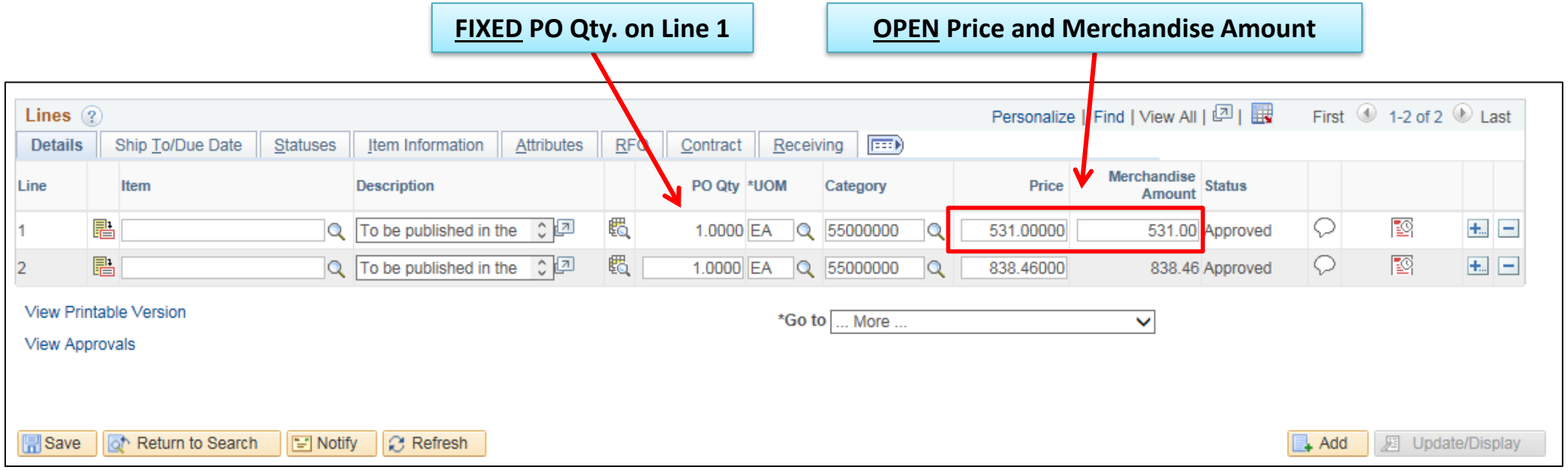


PO Change Orders: Change Line to ‘Amount ONLY’

13. Click **‘OK’** to the Message.



<u>The PO line will display a fixed ‘Qty’ of 1 and open ‘Price’ and ‘Merchandise Amount’ fields, as shown below on line 1.</u>



PO Change Orders: Change Line to ‘Amount ONLY’

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

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

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

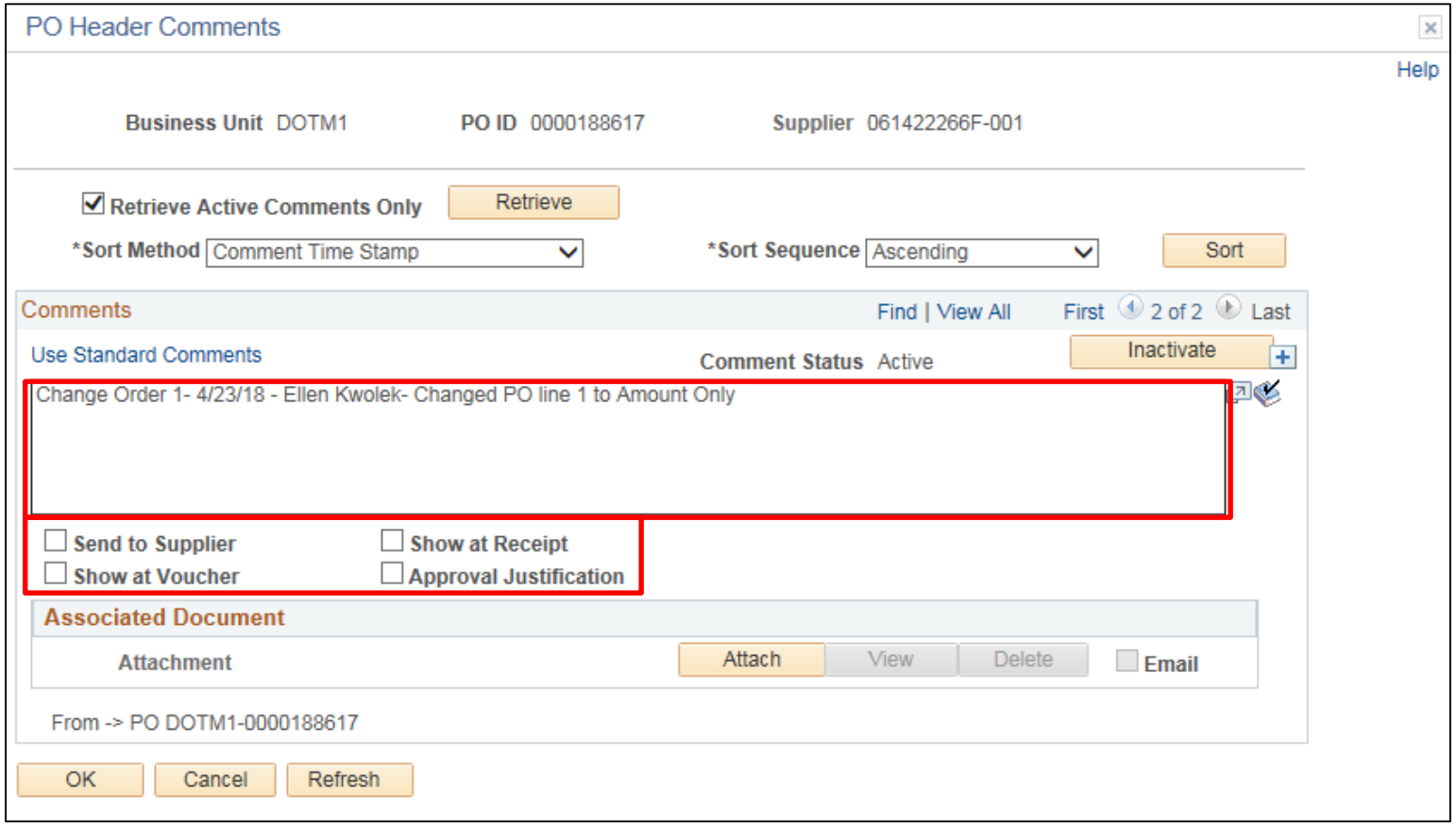
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the	1.0000	EA	55000000	531.00000	531.00	Approved
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

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

PO Change Orders: Change Line to 'Amount ONLY'

15. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
    Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble located on each PO line next to the **'Status'** field.

16. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.



PO Change Order Form

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

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

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

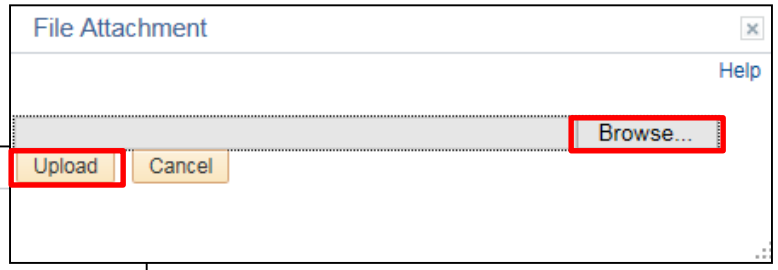
Change Order Request Form Revised 04/12/13

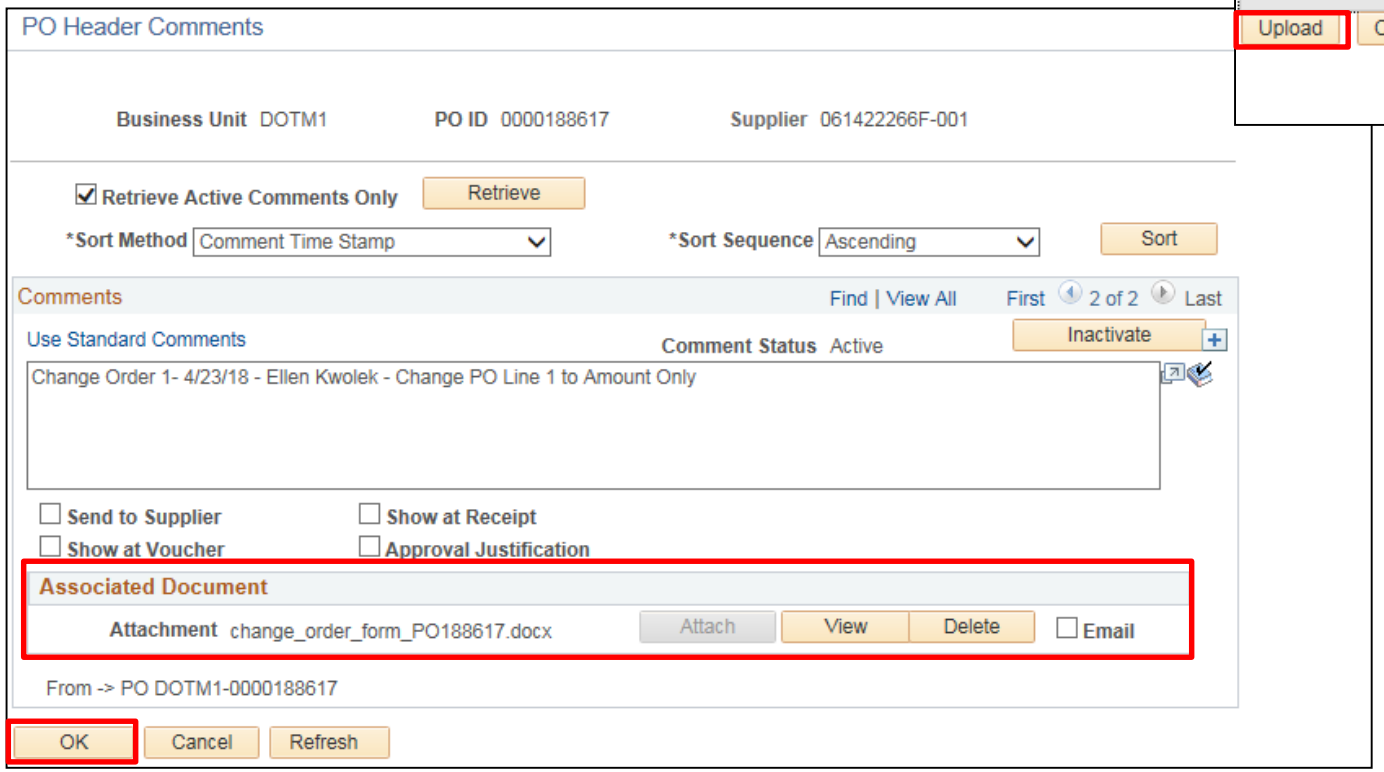
Change Order Request Form (SAMPLE)

PO Change Orders: Change Line to ‘Amount ONLY’

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

    If you changed the dollar amount(s) be sure to also adjust the **PO Obligation**, accordingly. (See Slides 12-14)





PO Change Orders: Change Line to 'Amount ONLY'

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Change Order 1
Copy From

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

Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

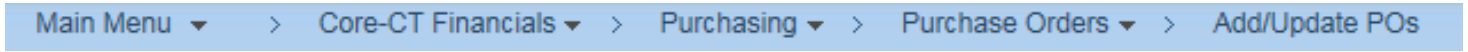
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the Hartford Courant on March 7 and 21, 2018	1.0000	EA	55000000	531.00000	531.00	Pending
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Pending

Add a New PO Line

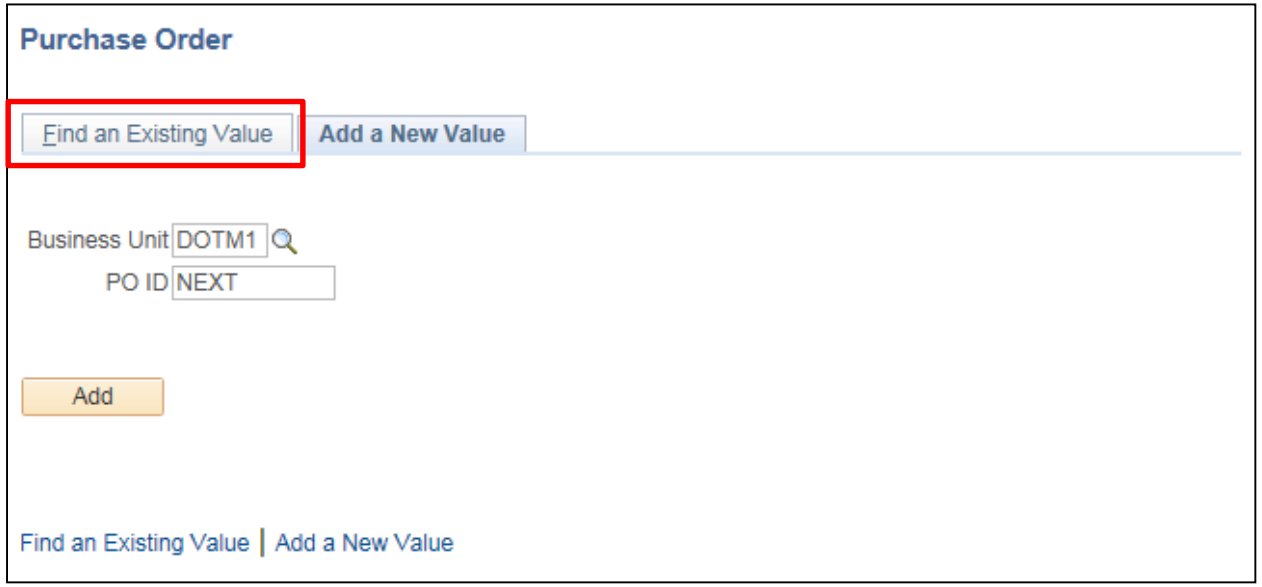
This action WILL initiate a change order

PO Change Orders: Add a PO Line

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



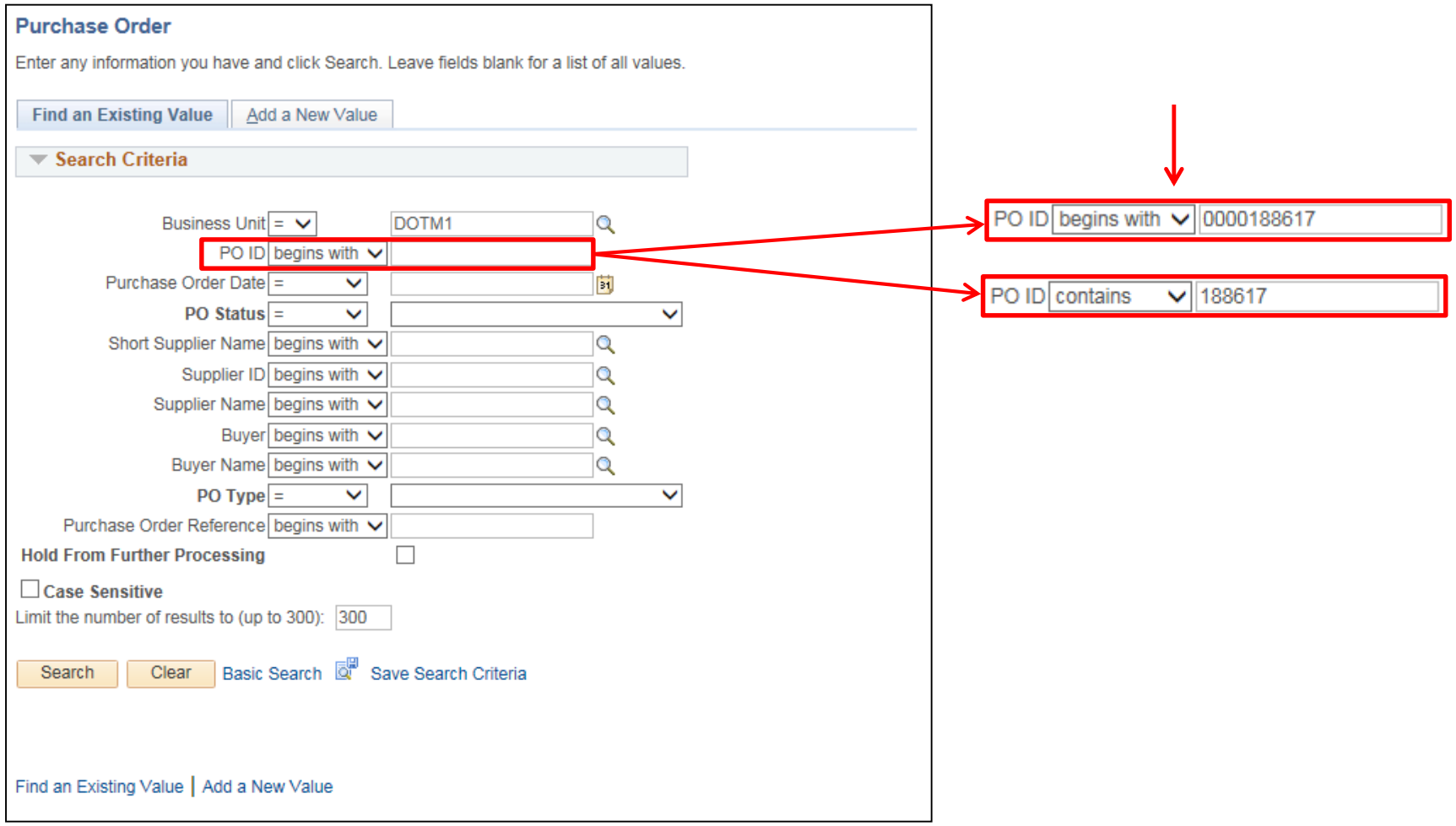
2. Select the **'Find an Existing Value'** tab.



PO Change Orders: Add a PO Line

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

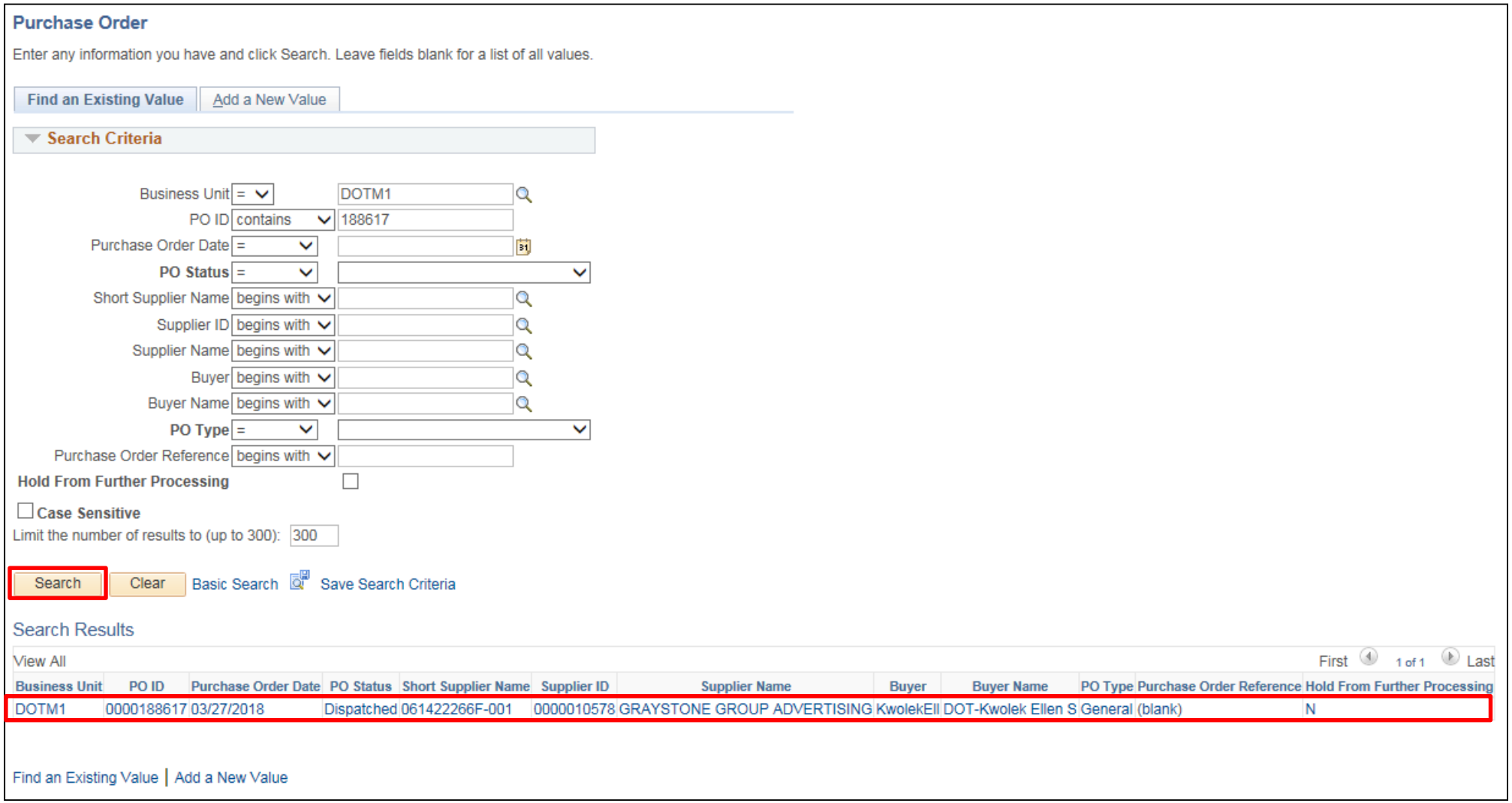
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000188617 or 188617)* *(Illustrated below)*



PO Change Orders: Add a PO Line

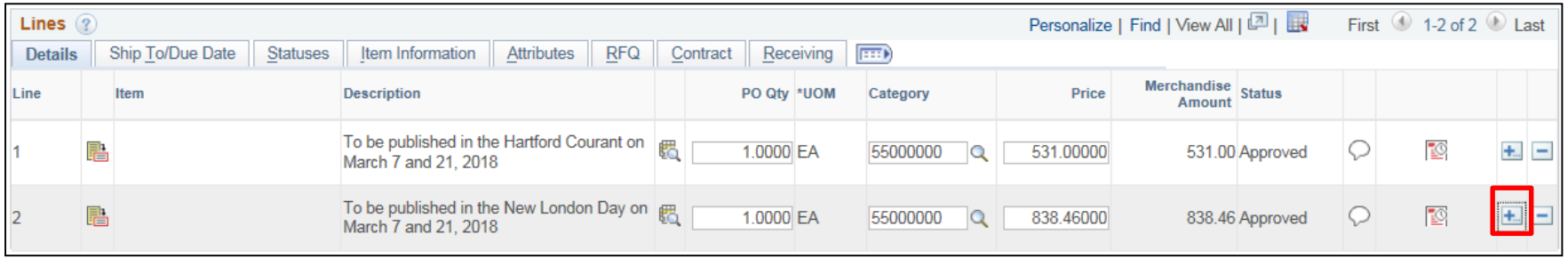
5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.

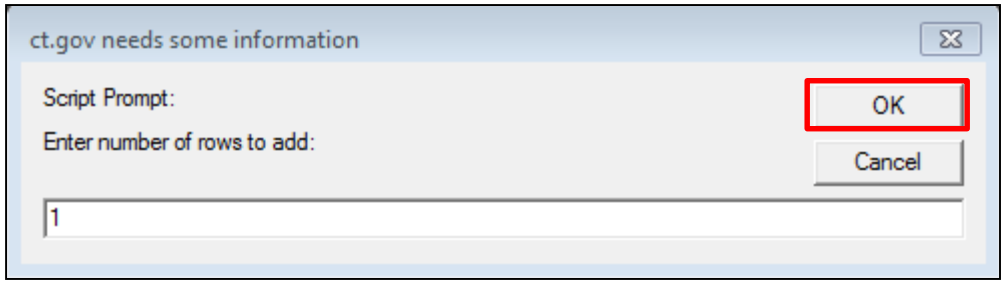


PO Change Orders: Add a PO Line

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

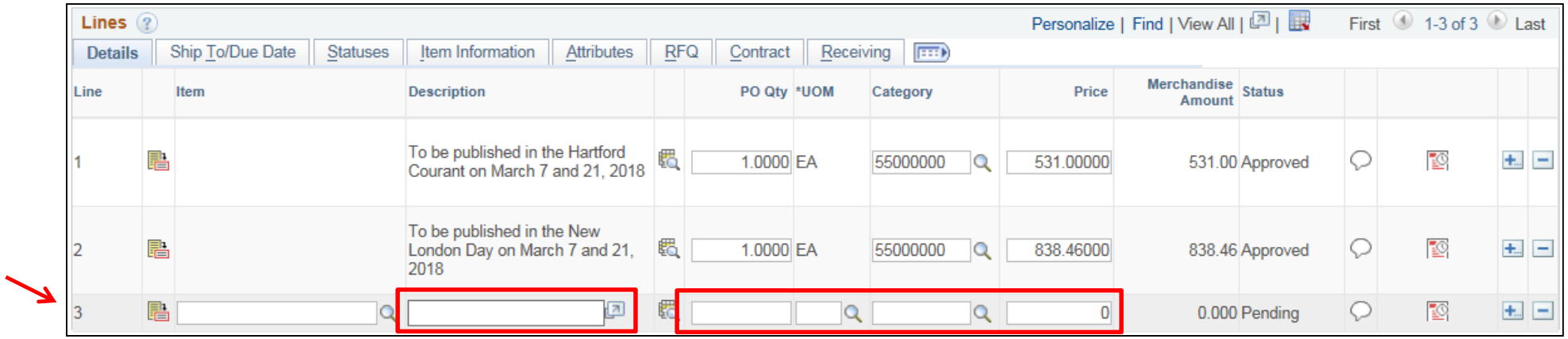


9. Enter the amount of lines you would like to enter. You could enter one line a time or add multiple lines at once.



PO Change Orders: Add a PO Line

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

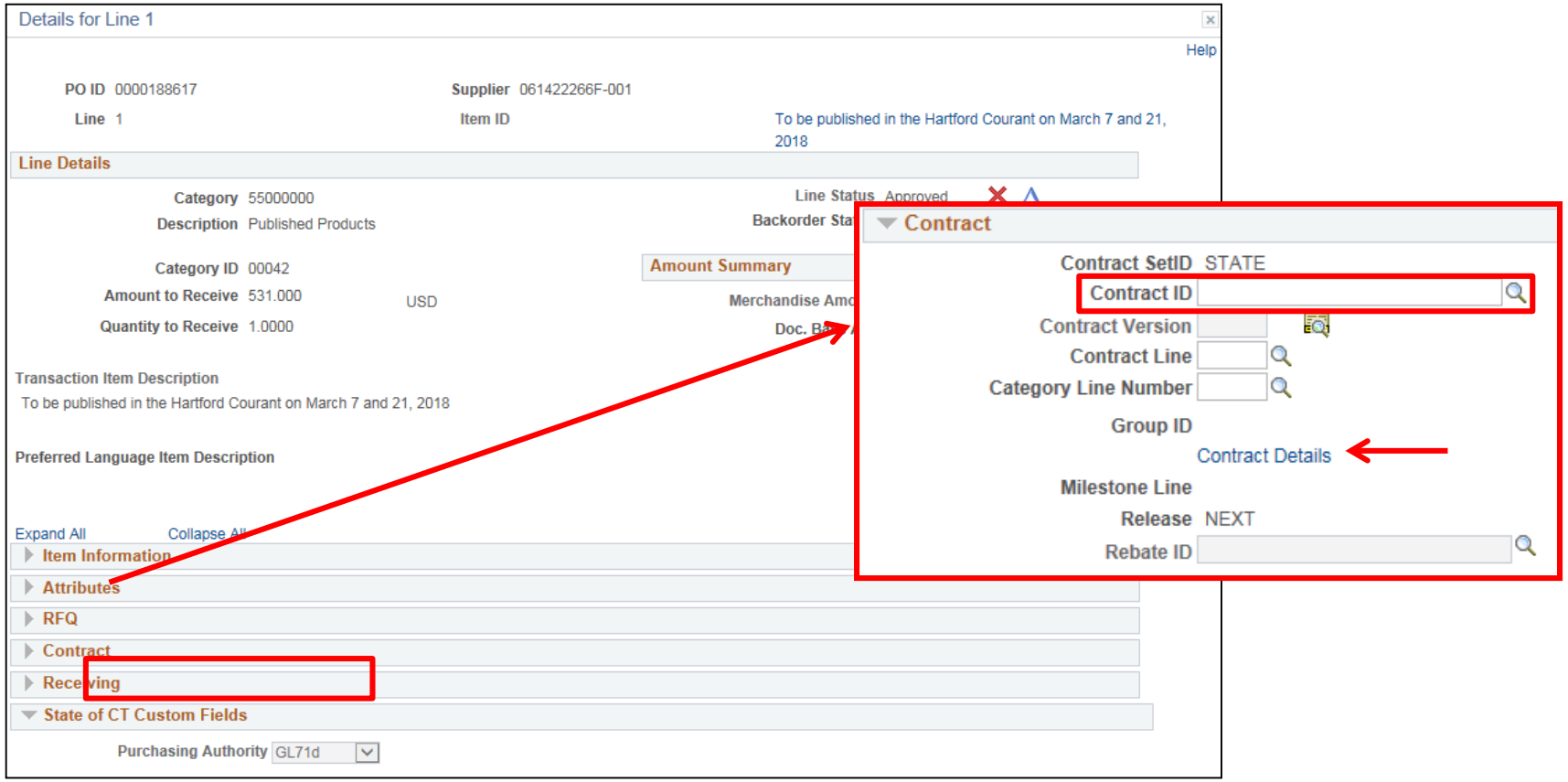


15. Click the **'Line Details'** icon to add the PO Contract.

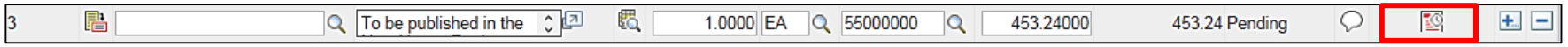
(SEE NEXT SLIDE)

PO Change Orders: Add a PO Line

16. Click on the gray arrow 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 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**.

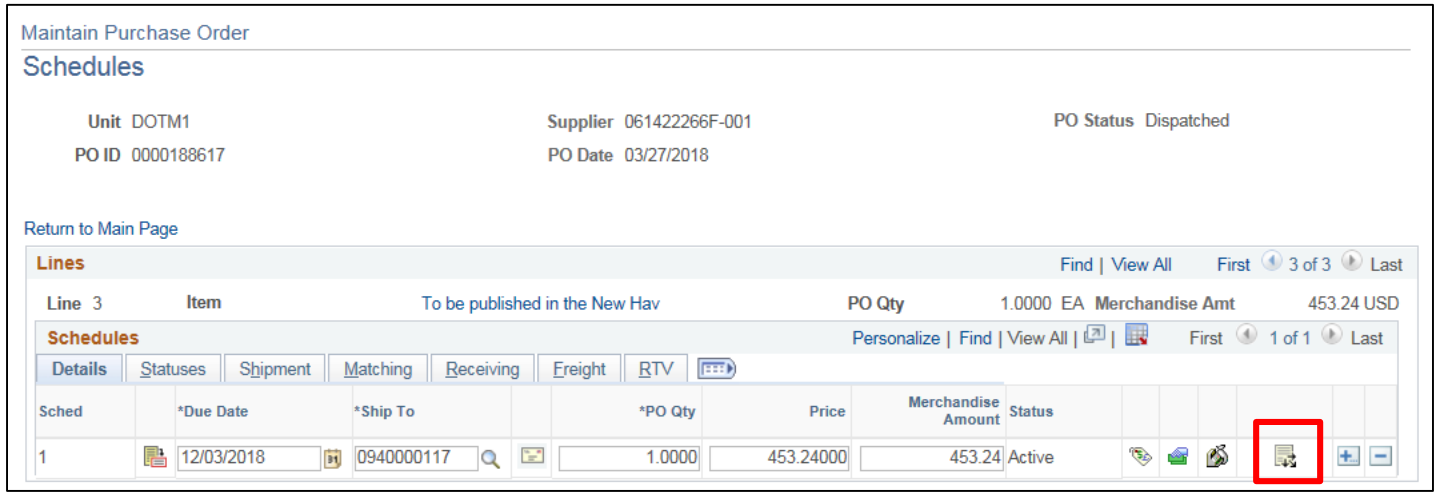


22. Next you will need to enter your chartfield coding. Click the **'Schedule'** icon on the PO line.



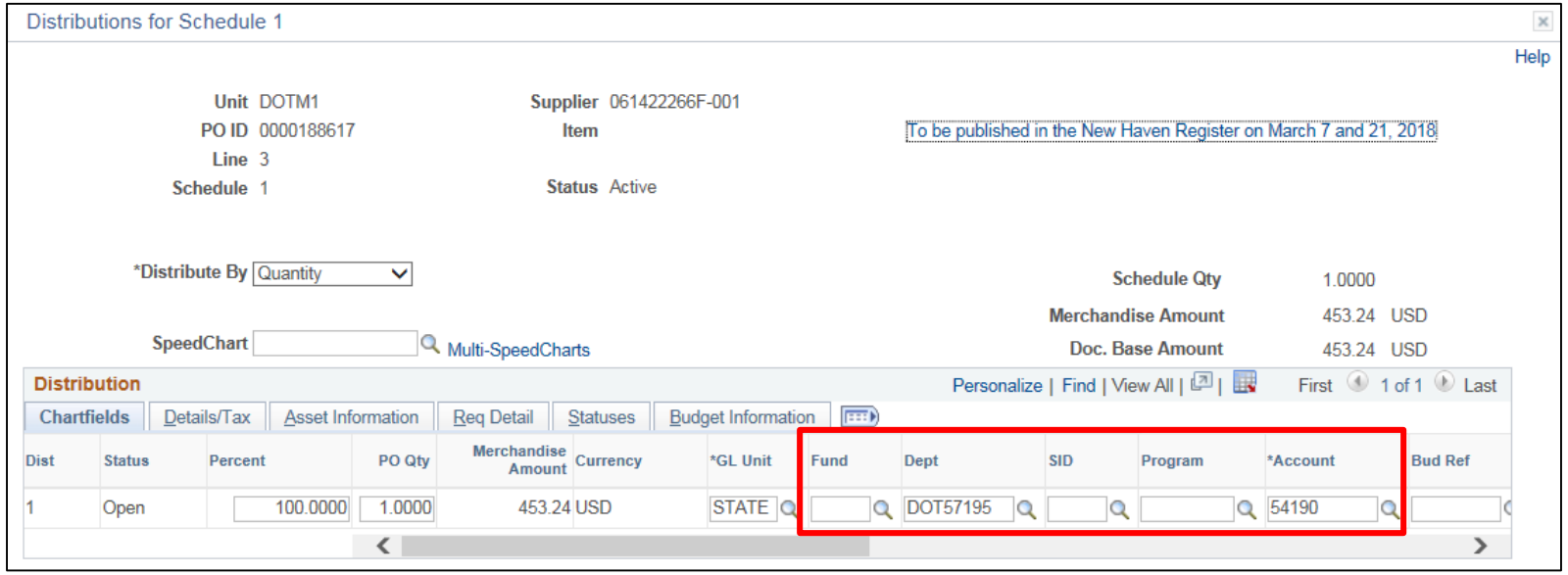
PO Change Orders: Add a PO Line

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



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.)



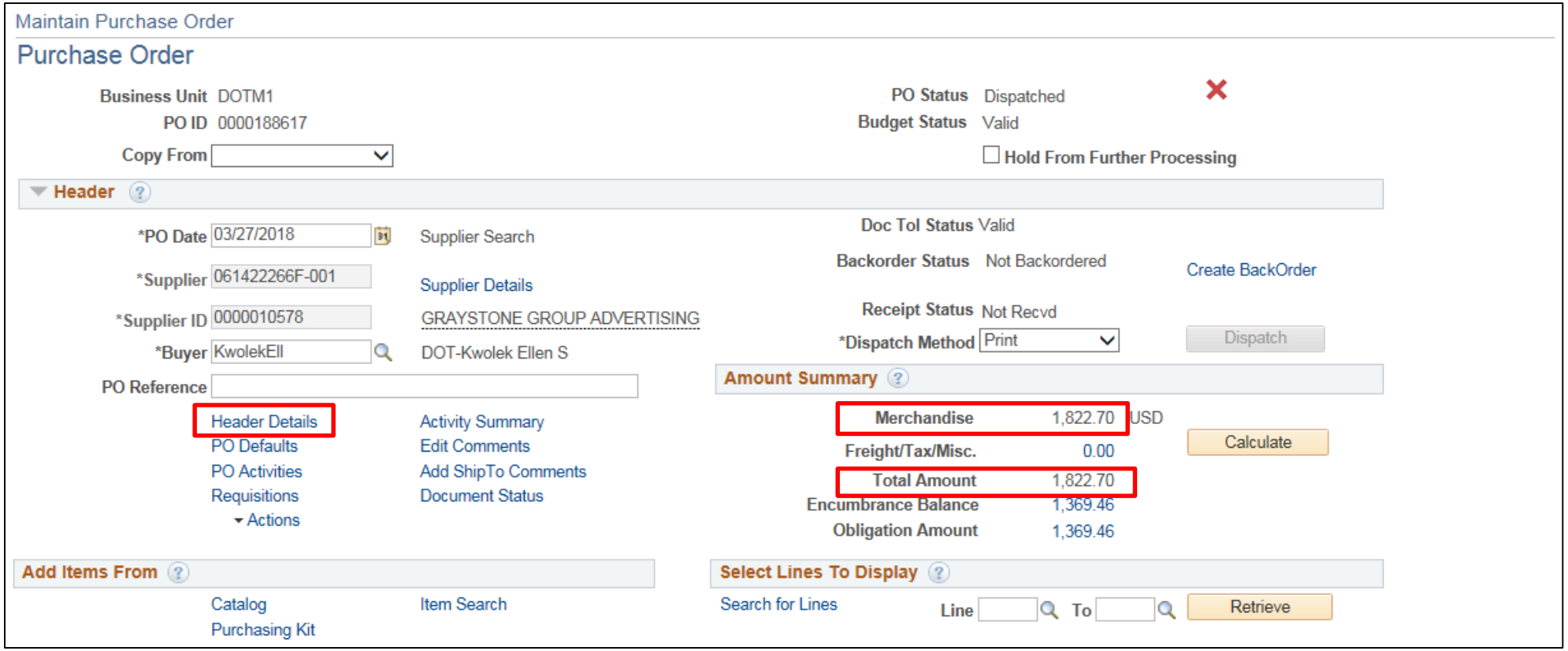
PO Change Orders: Add a PO Line

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

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

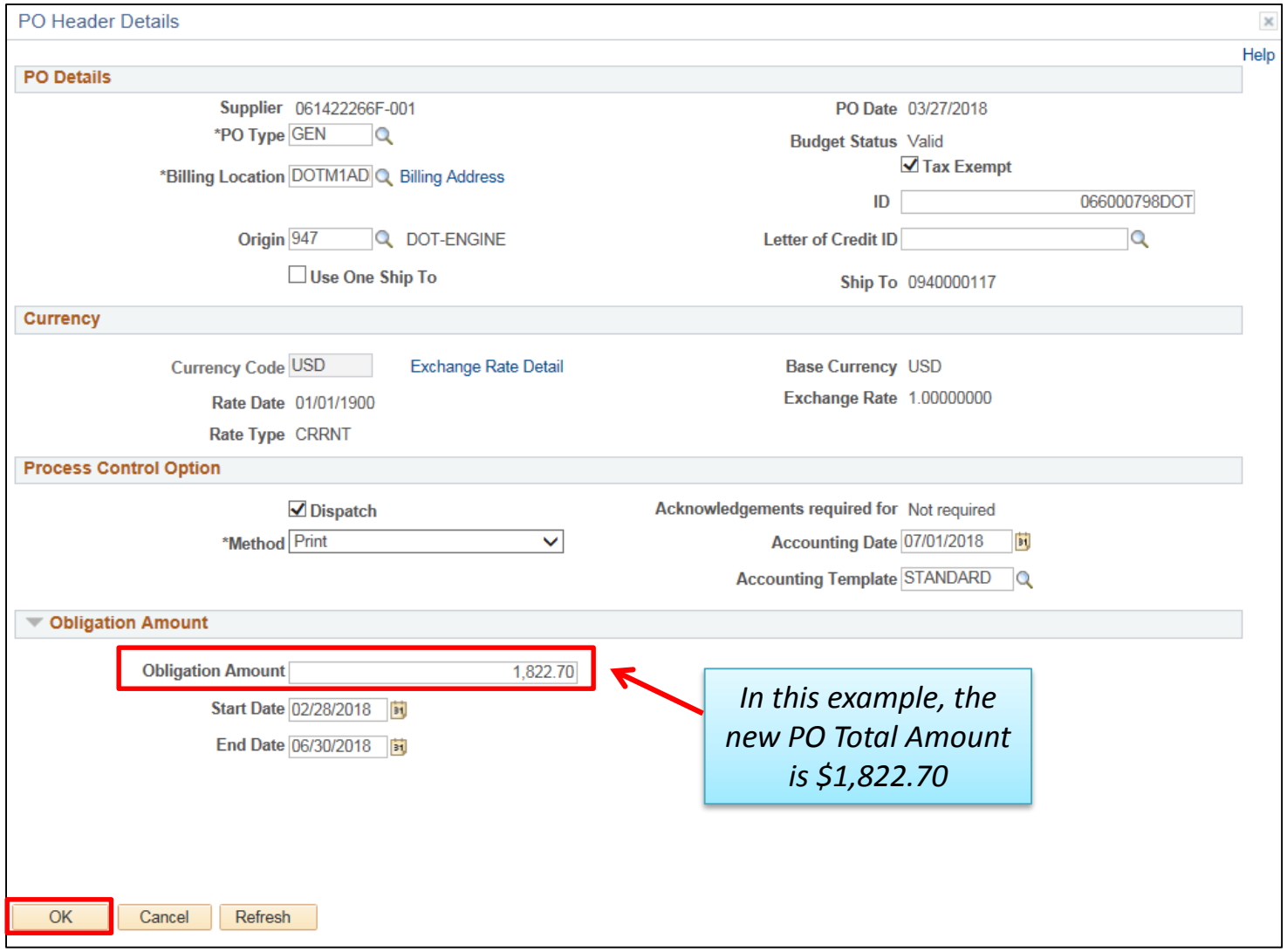
    Notice the PO **'Merchandise'** and **'Total Amount'** reflects the new PO Total Amount.
    (The **'Encumbrance Balance'** will reflect the new amount once the PO has been re-approved.)

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



PO Change Orders: Add a PO Line

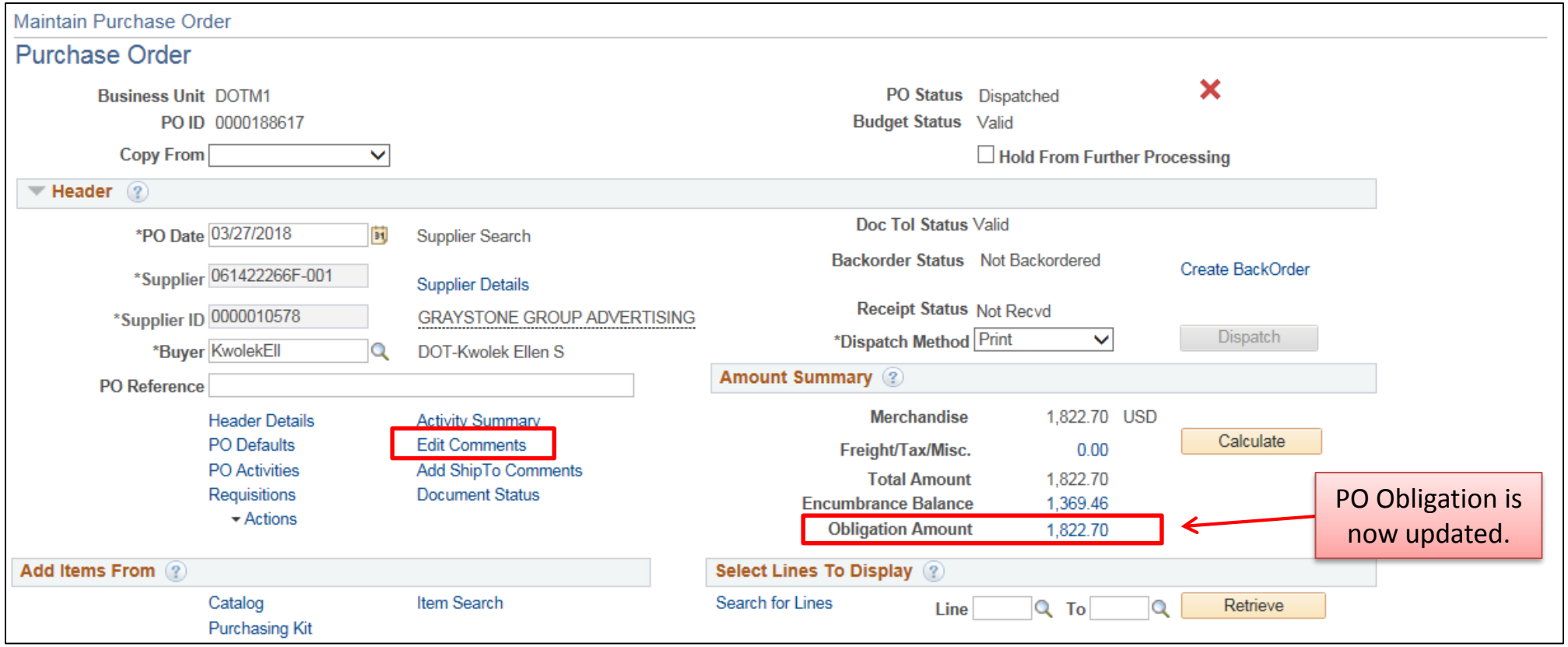
25. Enter the new **PO Obligation** in the **'Obligation Amount'** field. This typically matches the PO **'Total Amount'**. Your Total PO Amount should never exceed your Obligation Amount.
26. Click **'OK'**.



PO Change Orders: Add a PO Line

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

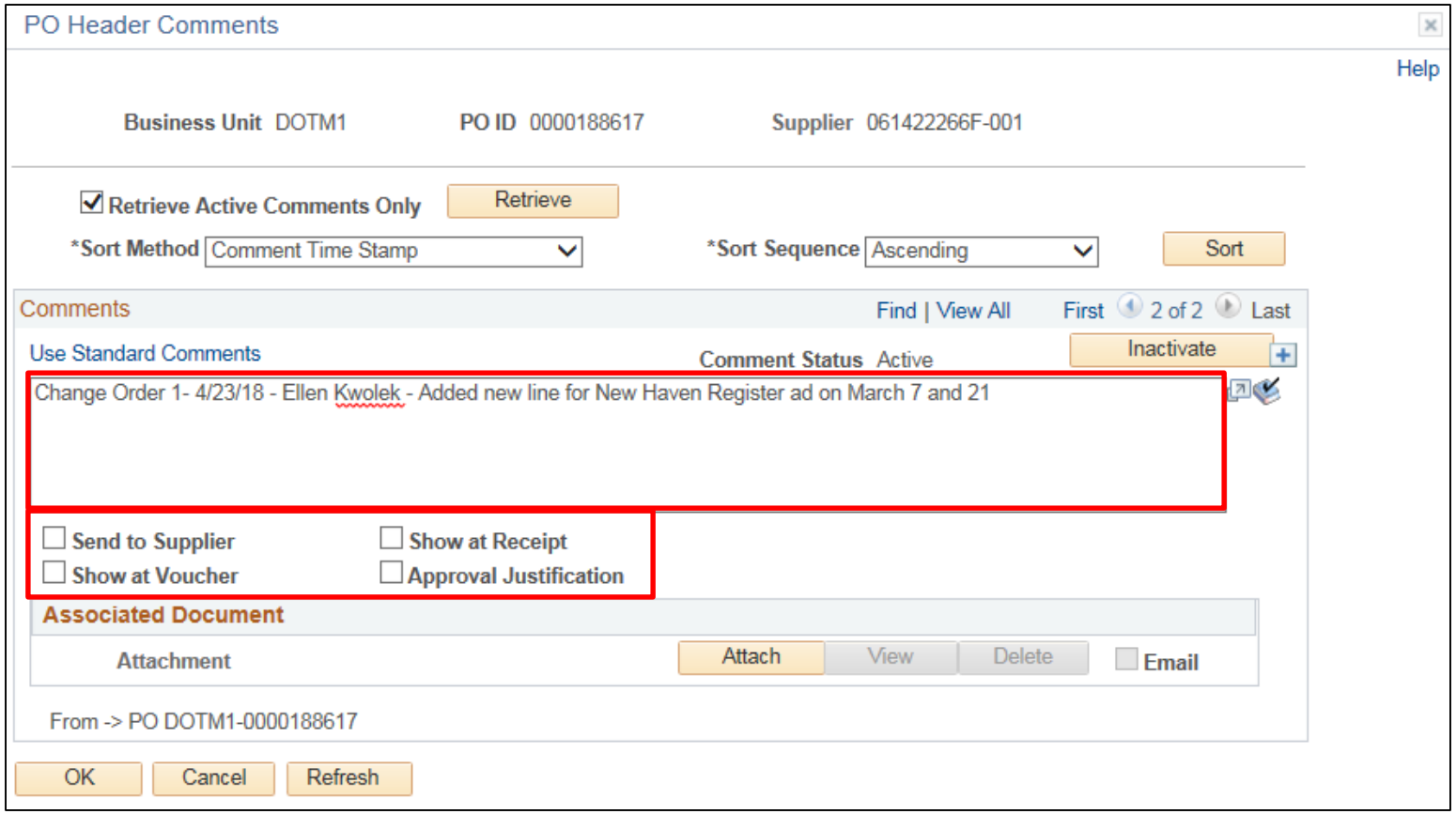
Click the **'Add Comments'** link.
If comments already exist in the PO Header the link will display as **'Edit Comments'**.)



PO Change Orders: Add a PO Line

28. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
    Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble located on each PO line next to the **'Status'** field.

29. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.



PO Change Order Form

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

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

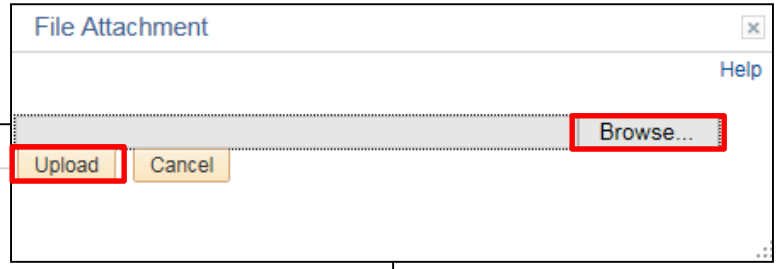
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

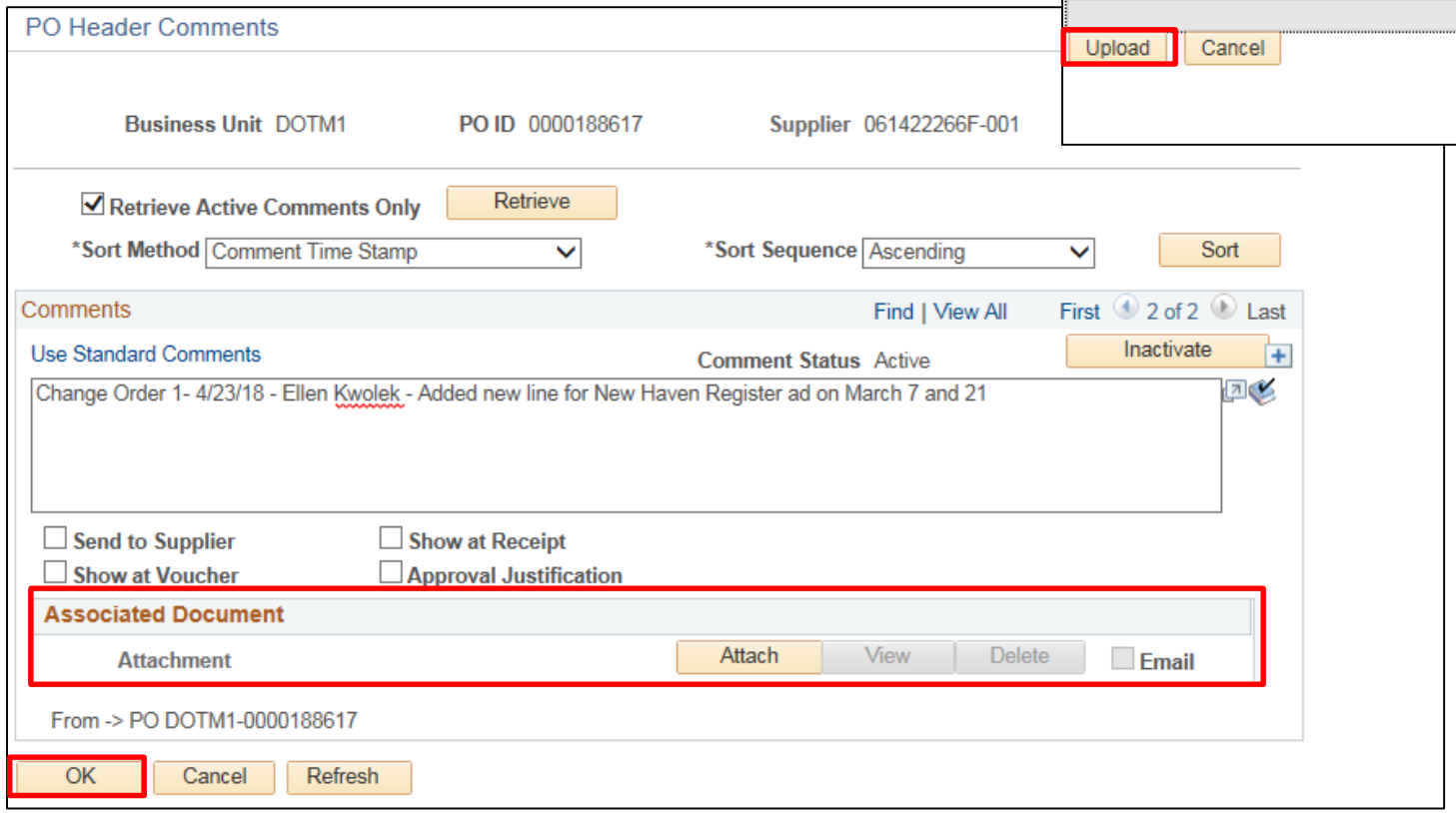
Change Order Request Form Revised 04/12/13

Change Order Request Form (SAMPLE)

PO Change Orders: Add a PO Line

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



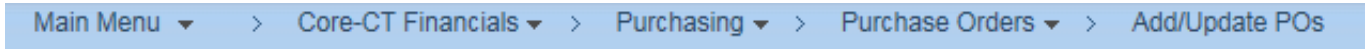


Close a PO Line
(Reduce to Expenditures)

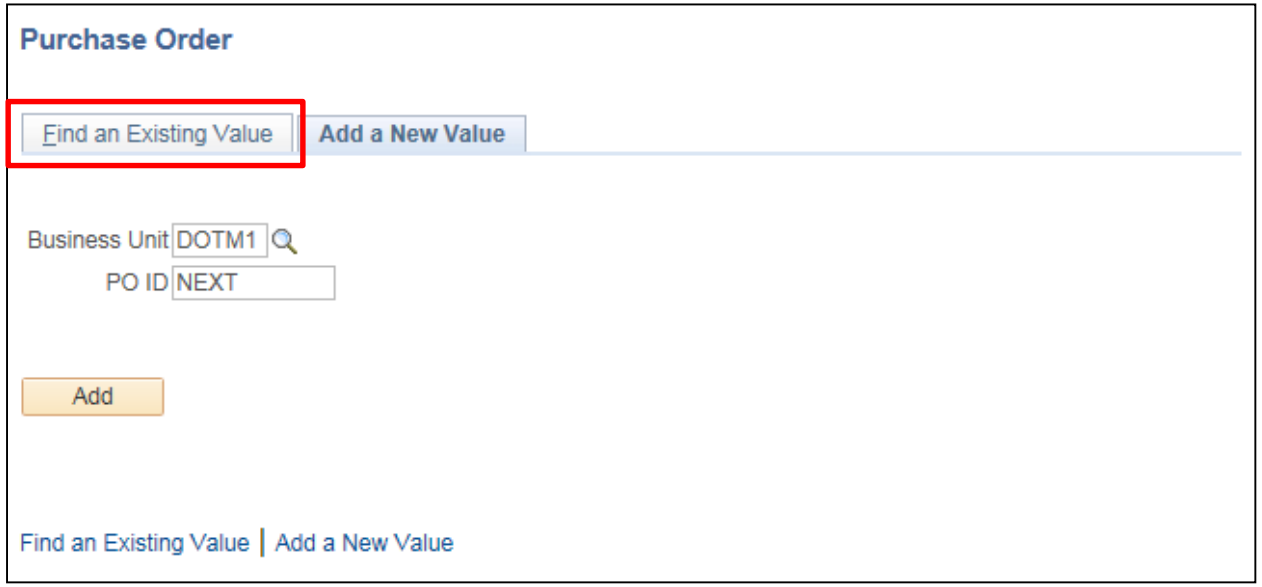
This action WILL initiate a change order

PO Change Orders: Close a PO Line

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



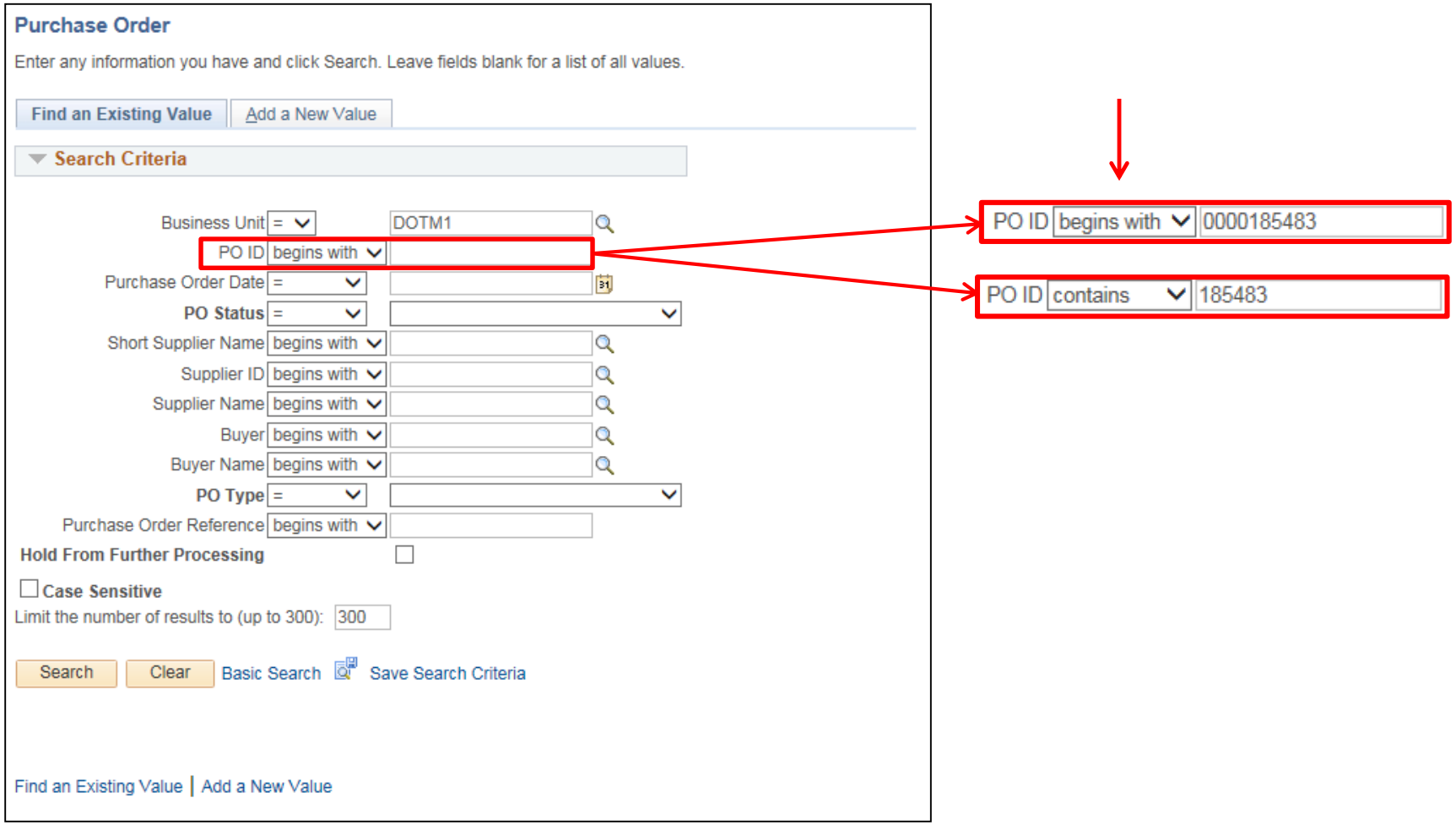
2. Select the **'Find an Existing Value'** tab.



PO Change Orders: Close a PO Line

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

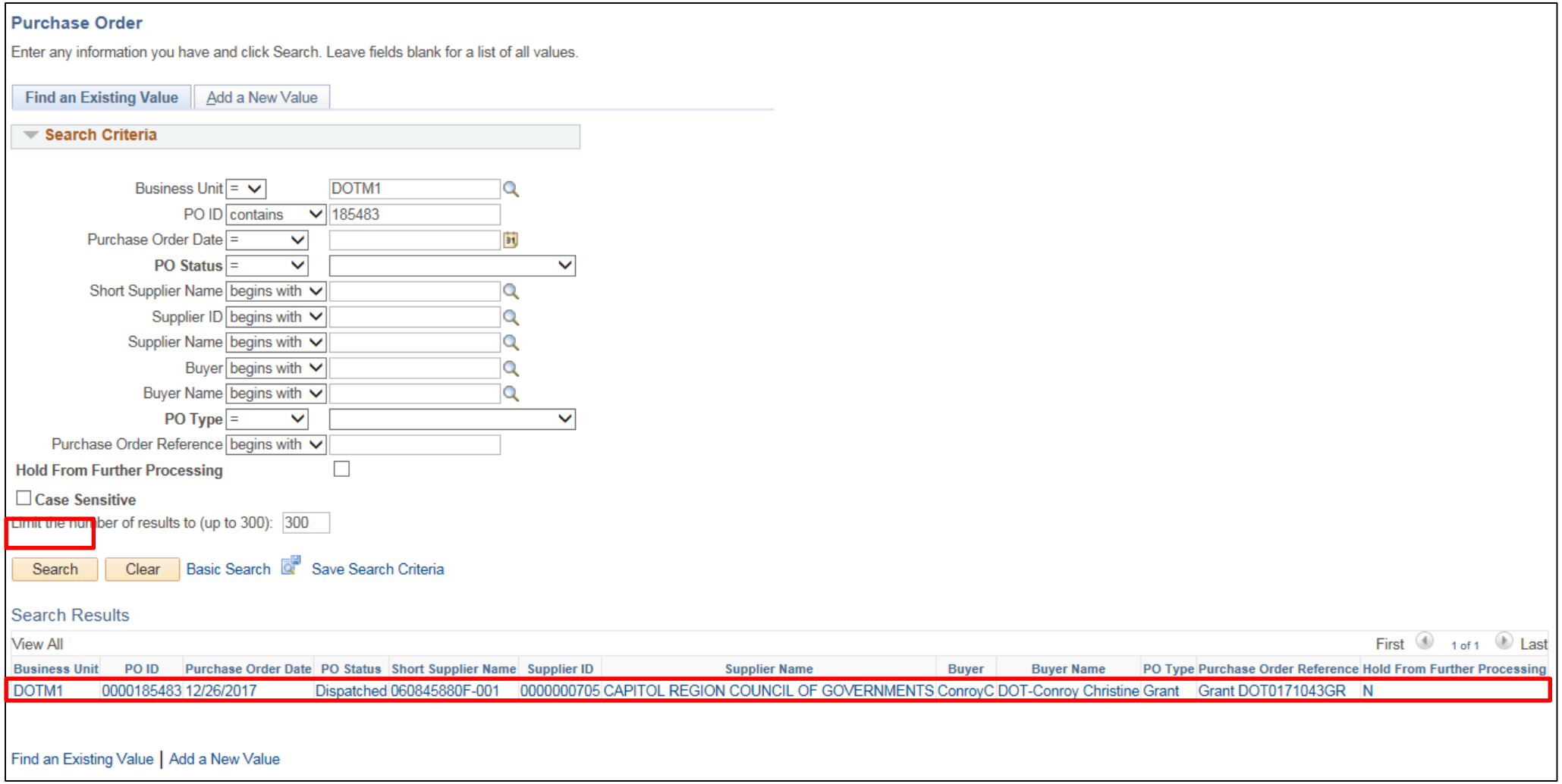
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000185483 or 185483)* *(Illustrated below)*



PO Change Orders: Close a PO Line

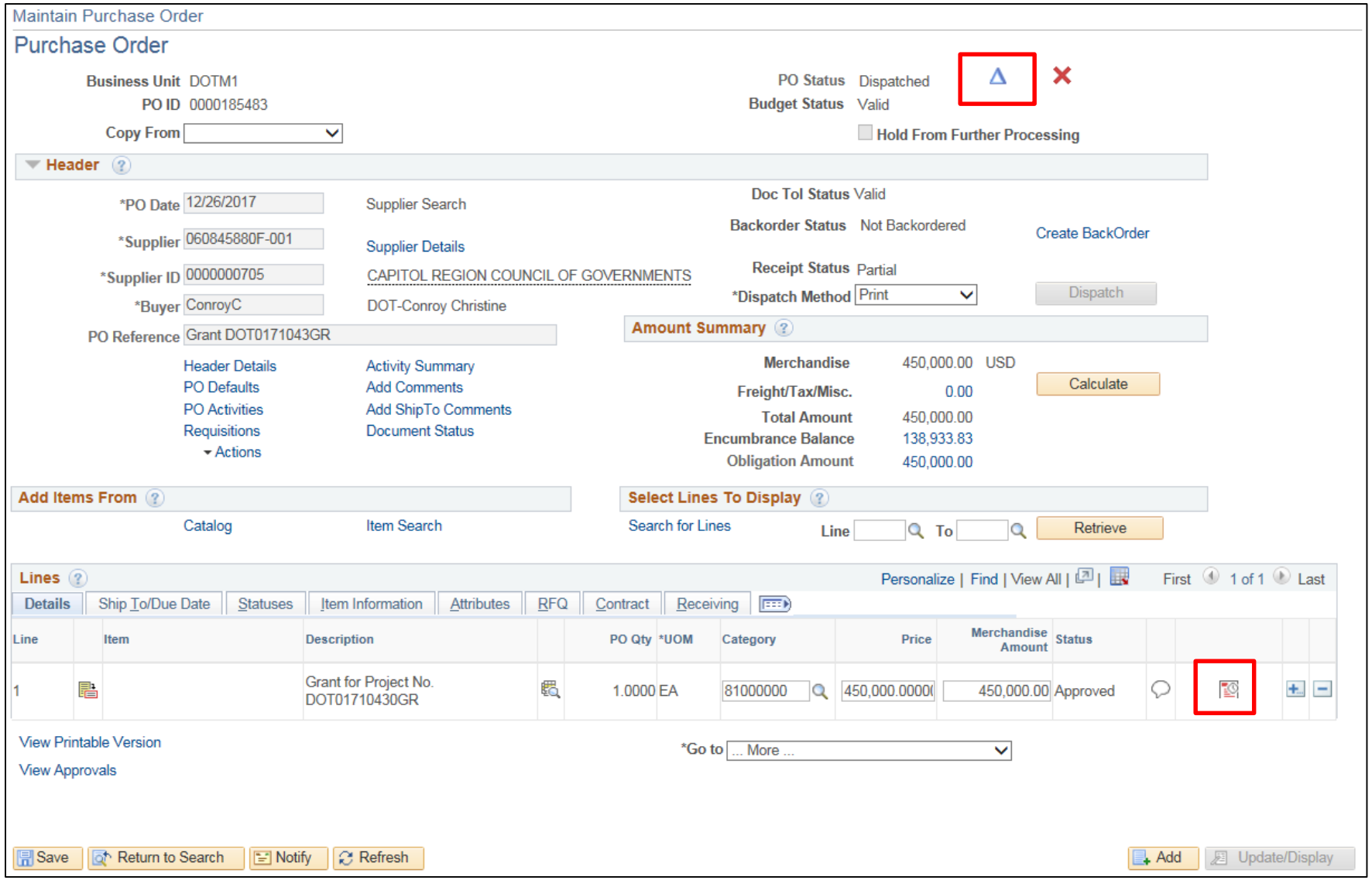
5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



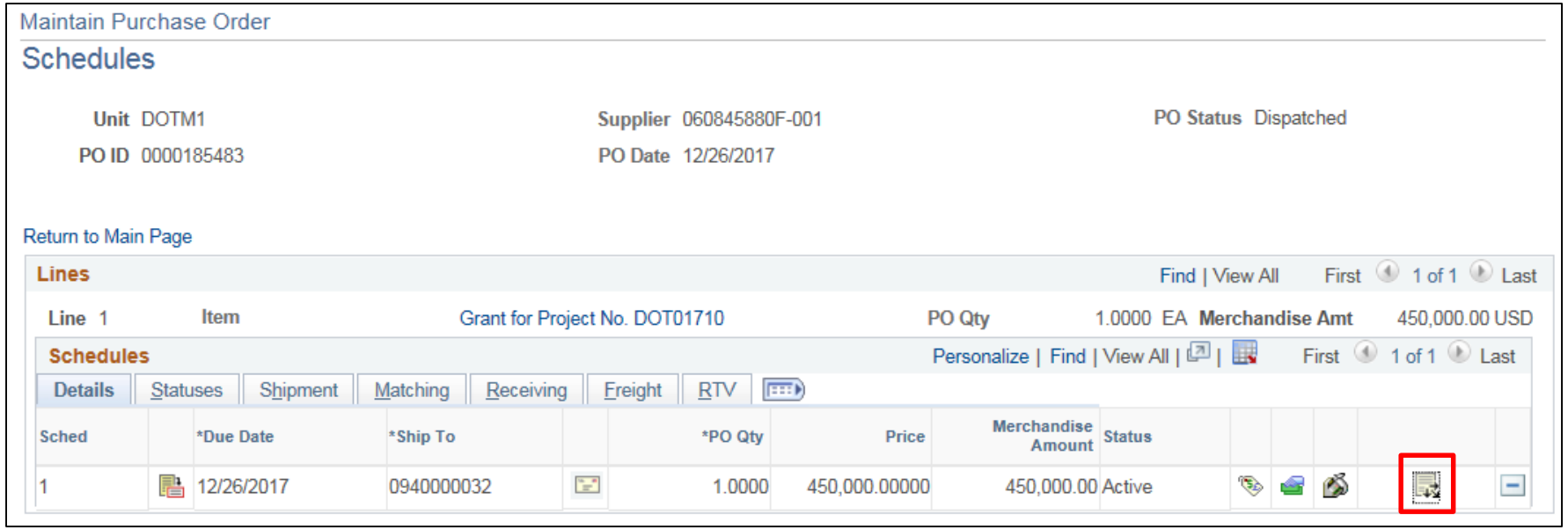
PO Change Orders: Close a PO Line

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



PO Change Orders: Close a PO Line

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

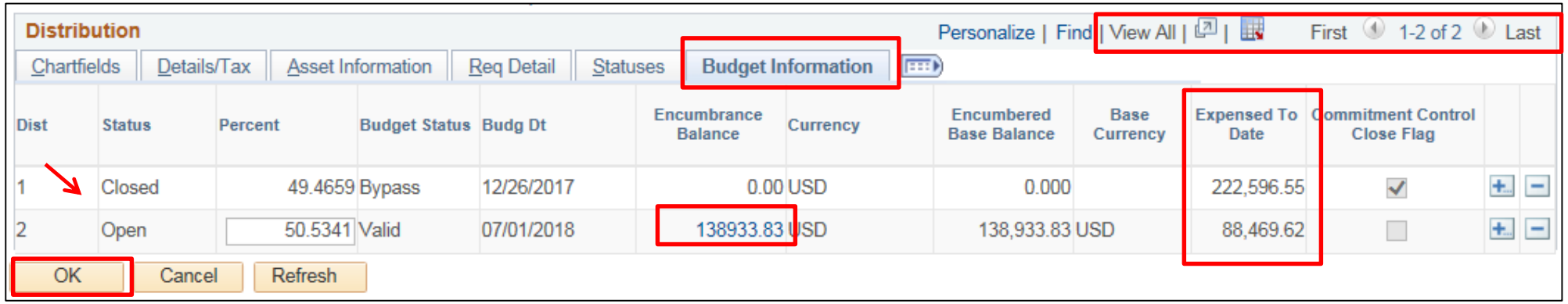


PO Change Orders: Close a PO Line

10. <u>**To verify the total expenditures to date**</u>:
- 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**, divide the total expended amount by the unit **'Price'** to determine the total quantity received.</u>

222,596.55
+
88,469.62

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



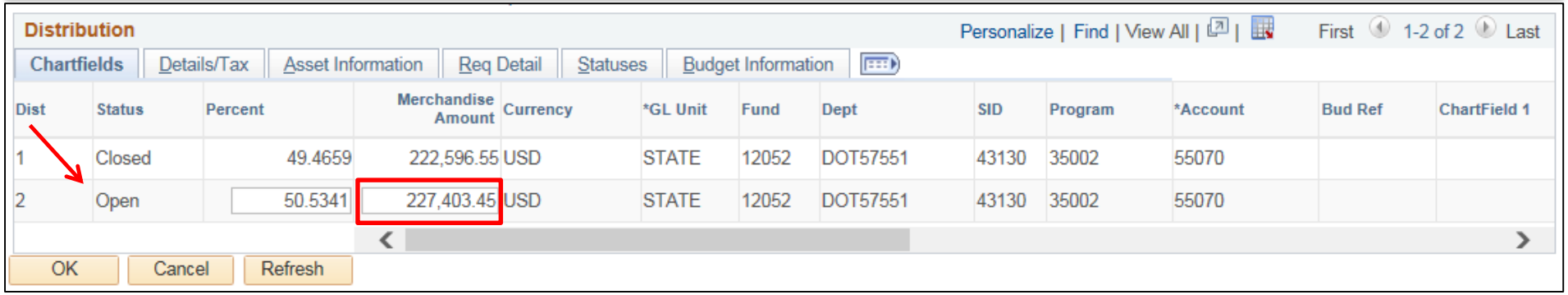
Dist	Status	Percent	Budget Status	Budg Dt	Encumbrance Balance	Currency	Encumbered Base Balance	Base Currency	Expensed To Date	Commitment Control Close Flag
1	Closed	49.4659	Bypass	12/26/2017	0.00	USD	0.000		222,596.55	☑
2	Open	50.5341	Valid	07/01/2018	138933.83	USD	138,933.83	USD	88,469.62	☐

PO Change Orders: Close a PO Line

11. **Return to the 'Chartfields' tab.**
    Below illustrates the **Distributions** window(s) – Quantity based and Amount based
12. Adjust the *Open* distribution line to the total amount expended. *(SEE BELOW)*
    - **Amount Based**: Enter the total amount expended under **'Merchandise Amount'**
    - **Quantity Based**: Enter the total quantity received under **'PO Qty'**

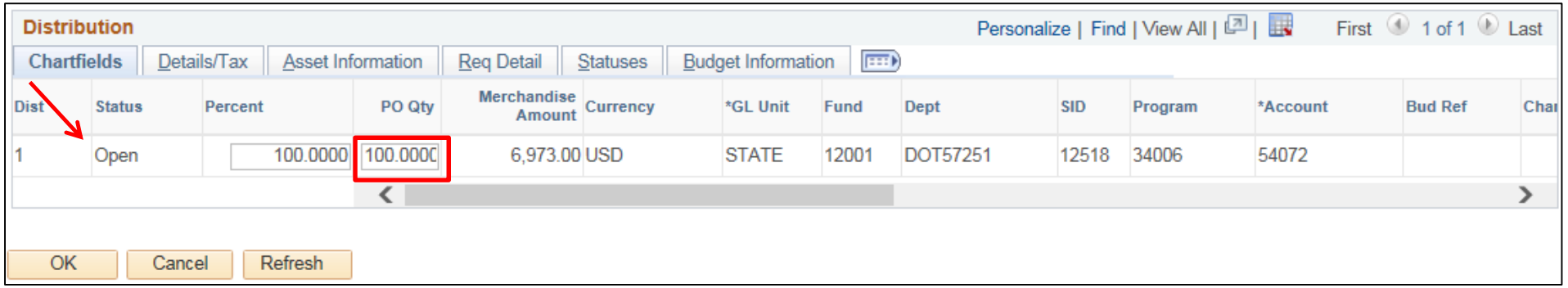
13. Click **'OK'** to return to the **Schedules** page.
14. Click the **'Return to Main Page'** link.

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



Dist	Status	Percent	Merchandise Amount	Currency	*GL Unit	Fund	Dept	SID	Program	*Account	Bud Ref	ChartField 1
1	Closed	49.4659	222,596.55	USD	STATE	12052	DOT57551	43130	35002	55070		
2	Open	50.5341	227,403.45	USD	STATE	12052	DOT57551	43130	35002	55070		

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



Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Fund	Dept	SID	Program	*Account	Bud Ref	Char
1	Open	100.0000	100.0000	6,973.00	USD	STATE	12001	DOT57251	12518	34006	54072		

PO Change Orders: Close a PO Line

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

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

Header

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

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

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

Amount Summary

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

Calculate

Add Items From
Catalog | Item Search
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

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

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

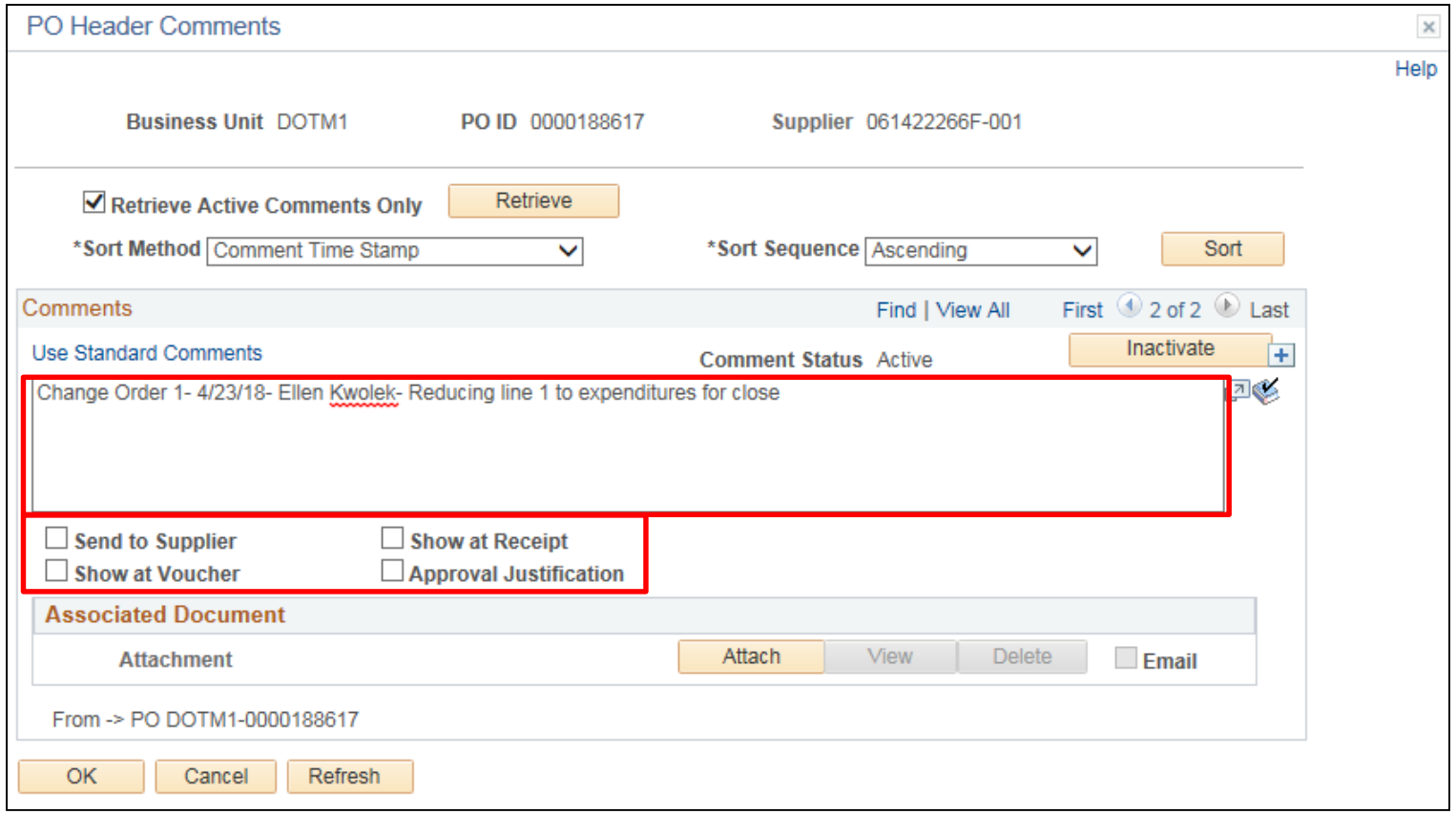
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		To be published in the	1.0000	EA	55000000	531.00000	531.00	Approved
2		To be published in the New London Day on March 7 and 21, 2018	1.0000	EA	55000000	838.46000	838.46	Approved

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

PO Change Orders: Close a PO Line

16. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
    Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble located on each PO line next to the **'Status'** field.

17. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.



PO Change Order Form

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

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

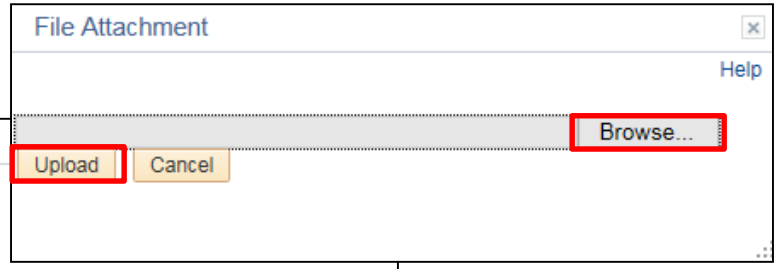
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

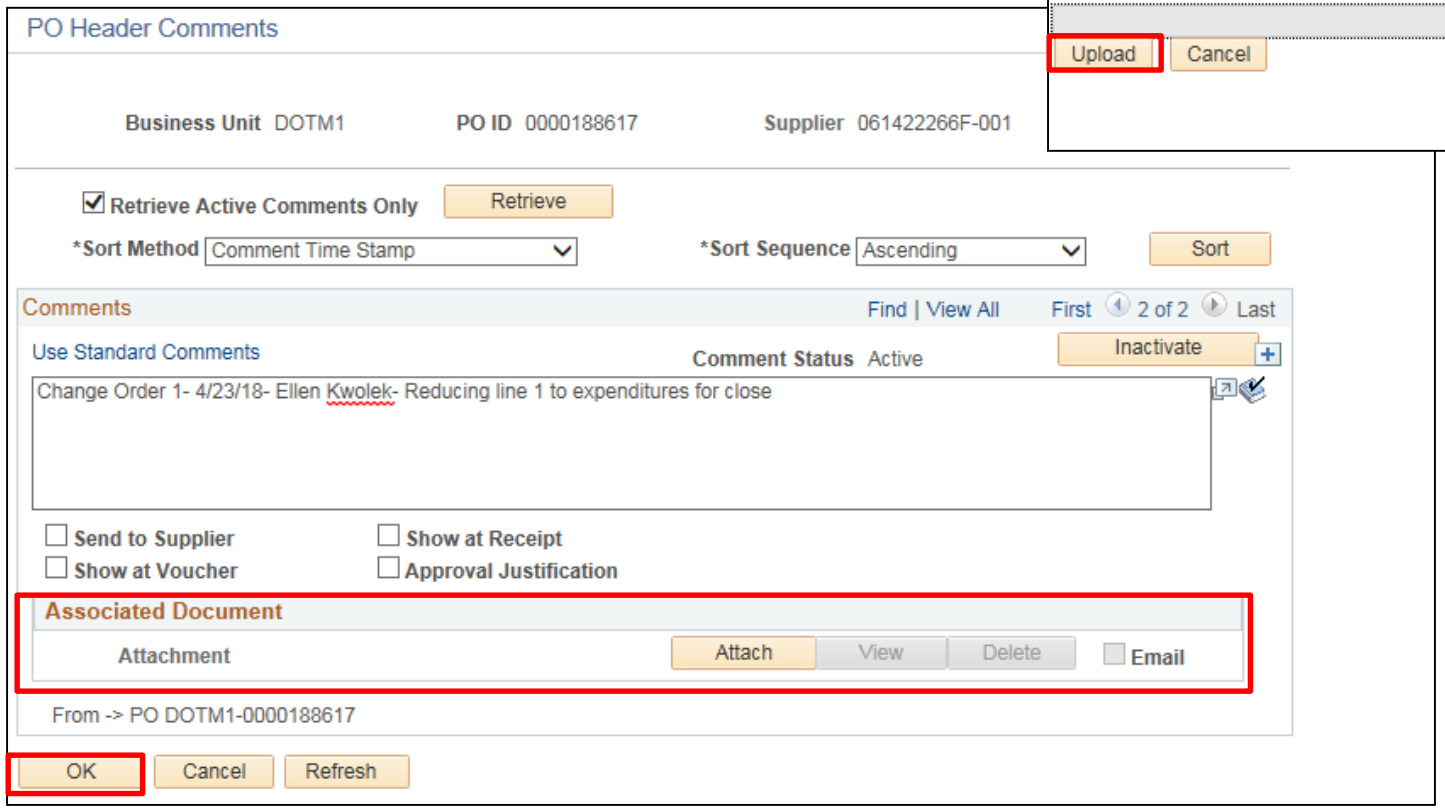
Change Order Request Form Revised 04/12/13

Change Order Request Form (SAMPLE)

PO Change Orders: Add a PO Line

19. Complete the **Change Order Form** with the appropriate information.
20. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
21. Click the **'Attach'** button to attach the completed form to the change order comment. 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.
25. Click **'Save'** the PO at the bottom of the main page. Save



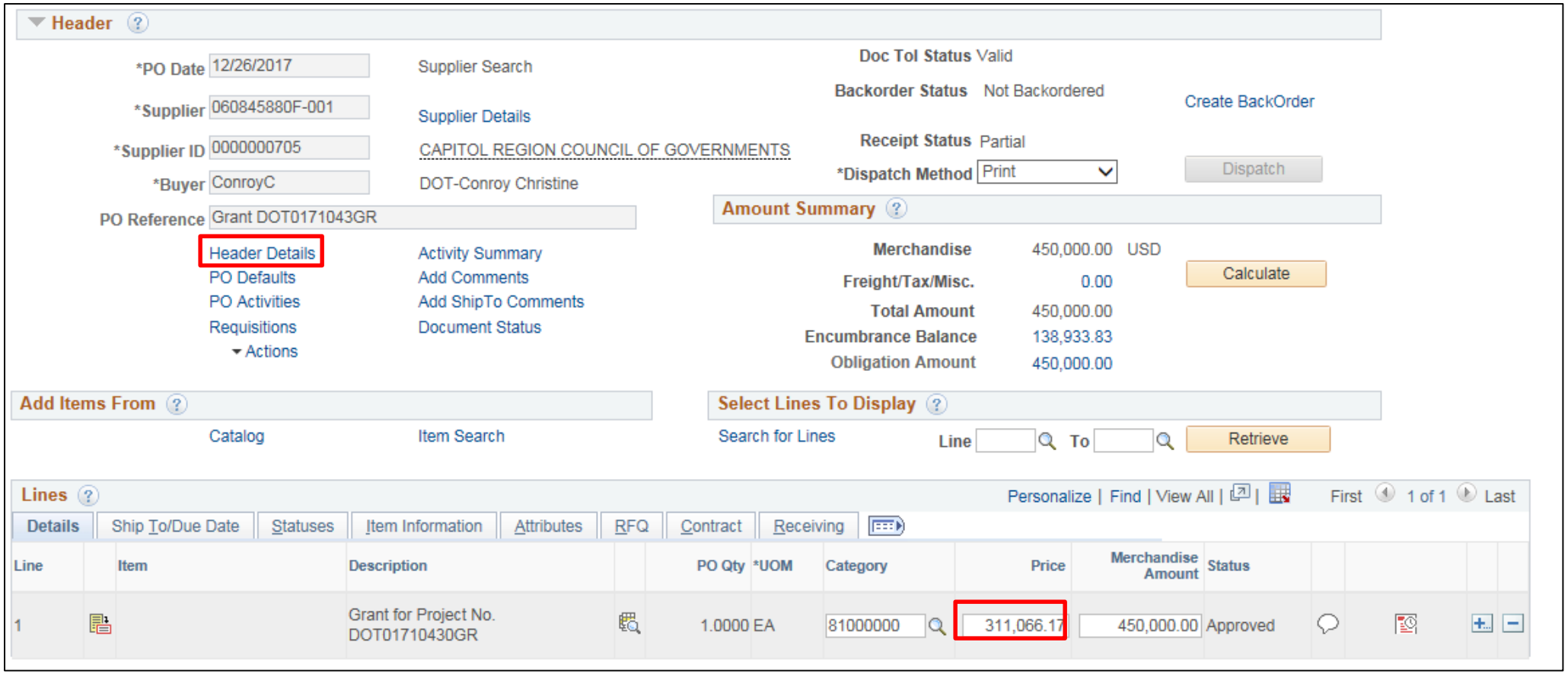


PO Change Orders: Close a PO Line

26. **Adjust the line amount to reflect the total expended amount.**
    - **<u>Amount Based:</u>** Enter the total line expended amount in the **'Price'** field.
    - **<u>Quantity Based:</u>** Enter the total quantity received in the **'Qty'** field.

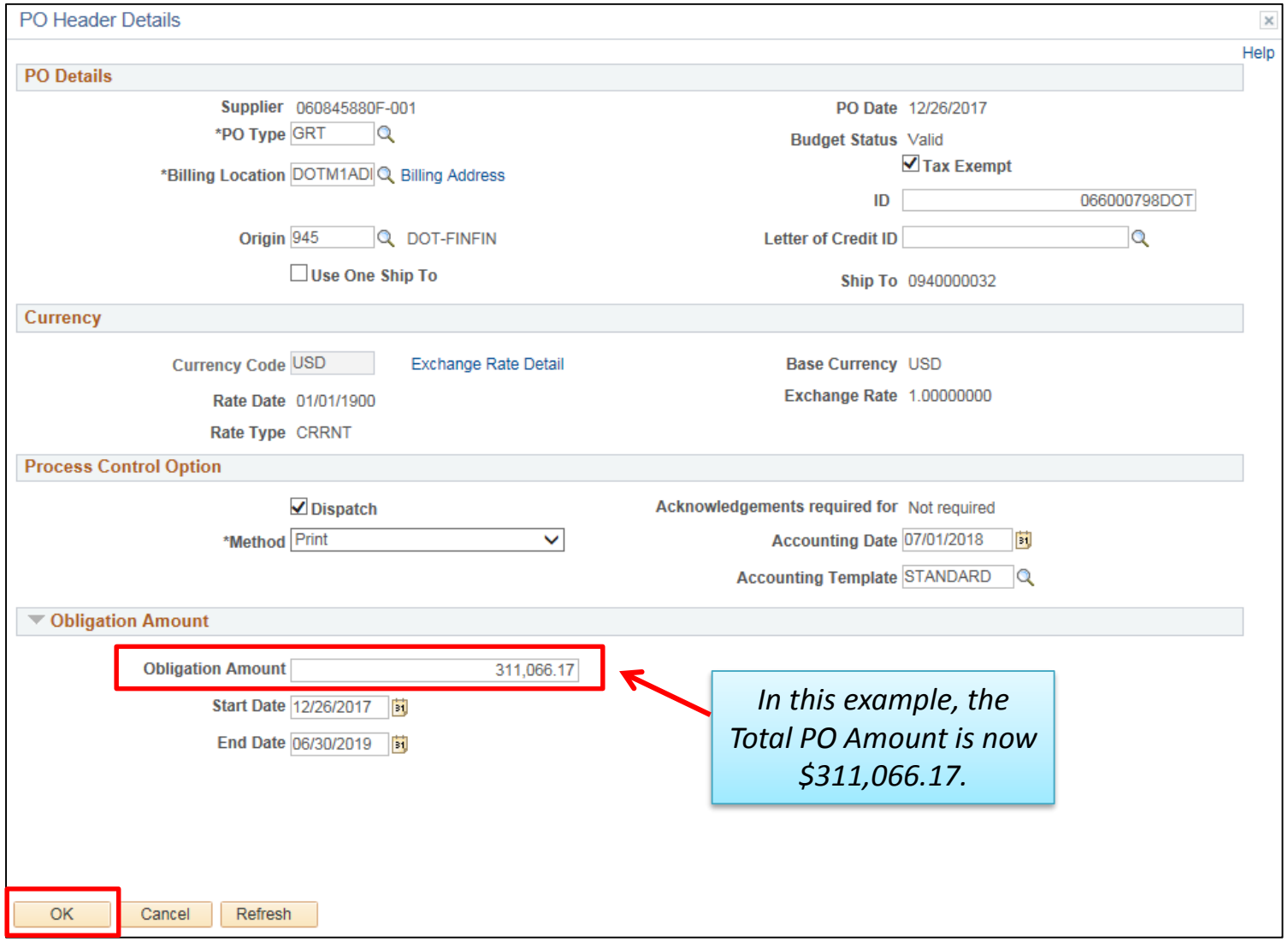
    (In this example the line is Amount based and has been adjusted to $311,066.17)

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)



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 Change Orders: Add a PO Line

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000185483
Copy From

PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

PO Obligation is now updated.

Add Items From
Catalog Item Search

Select Lines To Display
Search for Lines Line To Retrieve

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

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Grant for Project No. DOT01710430GR	1.0000	EA	81000000	311,066.1700(	311,066.17	Approved

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*Go to ... More ...

Save | Return to Search | Notify | Refresh | Add | Update/Display

Cancel a PO Line
(No Activity ONLY)

This action WILL initiate a change order

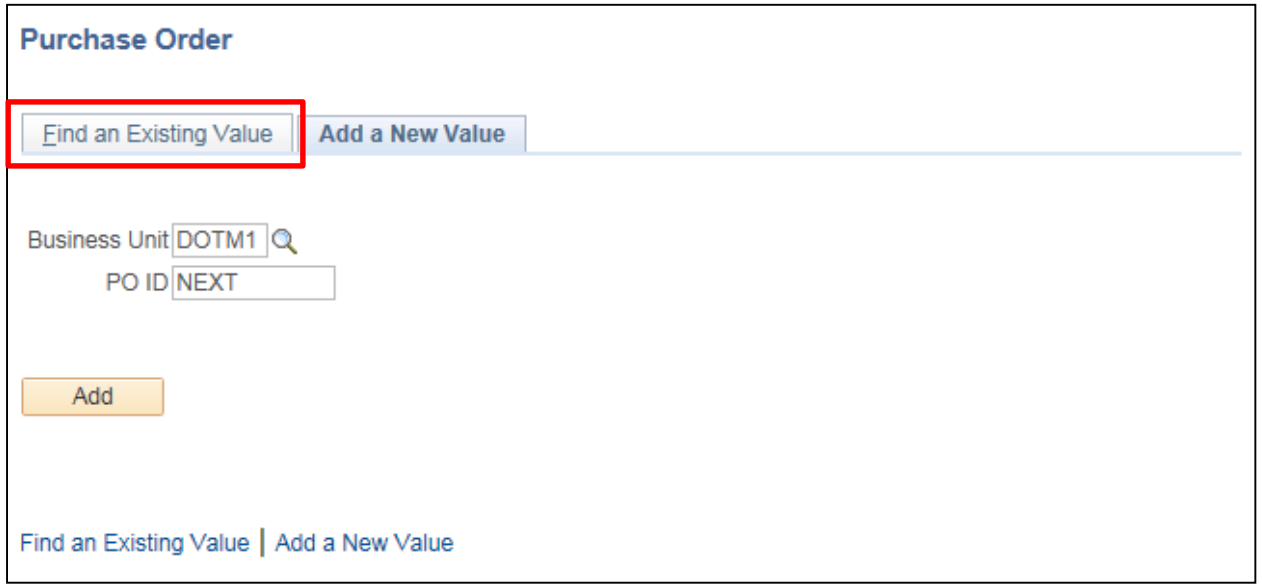
PO Change Orders: Cancel a PO Line (No Activity ONLY)

IMPORTANT: <u>A PO LINE CAN ONLY BE CANCELED IF THERE HAS BEEN NO ACTIVITY (ZERO EXPENDITURES).</u>
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'**.

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

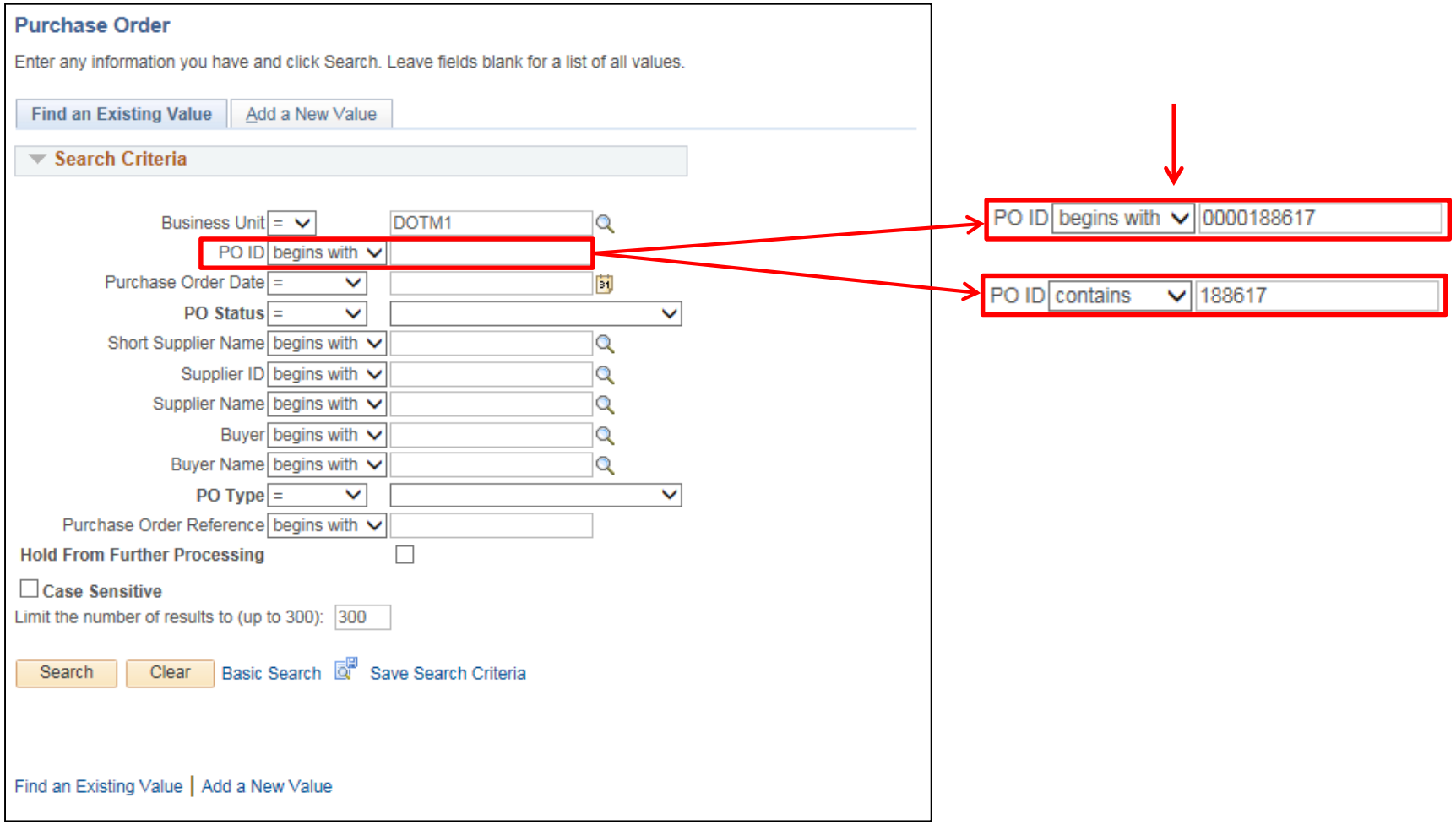
2. Select the **'Find an Existing Value'** tab.



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

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

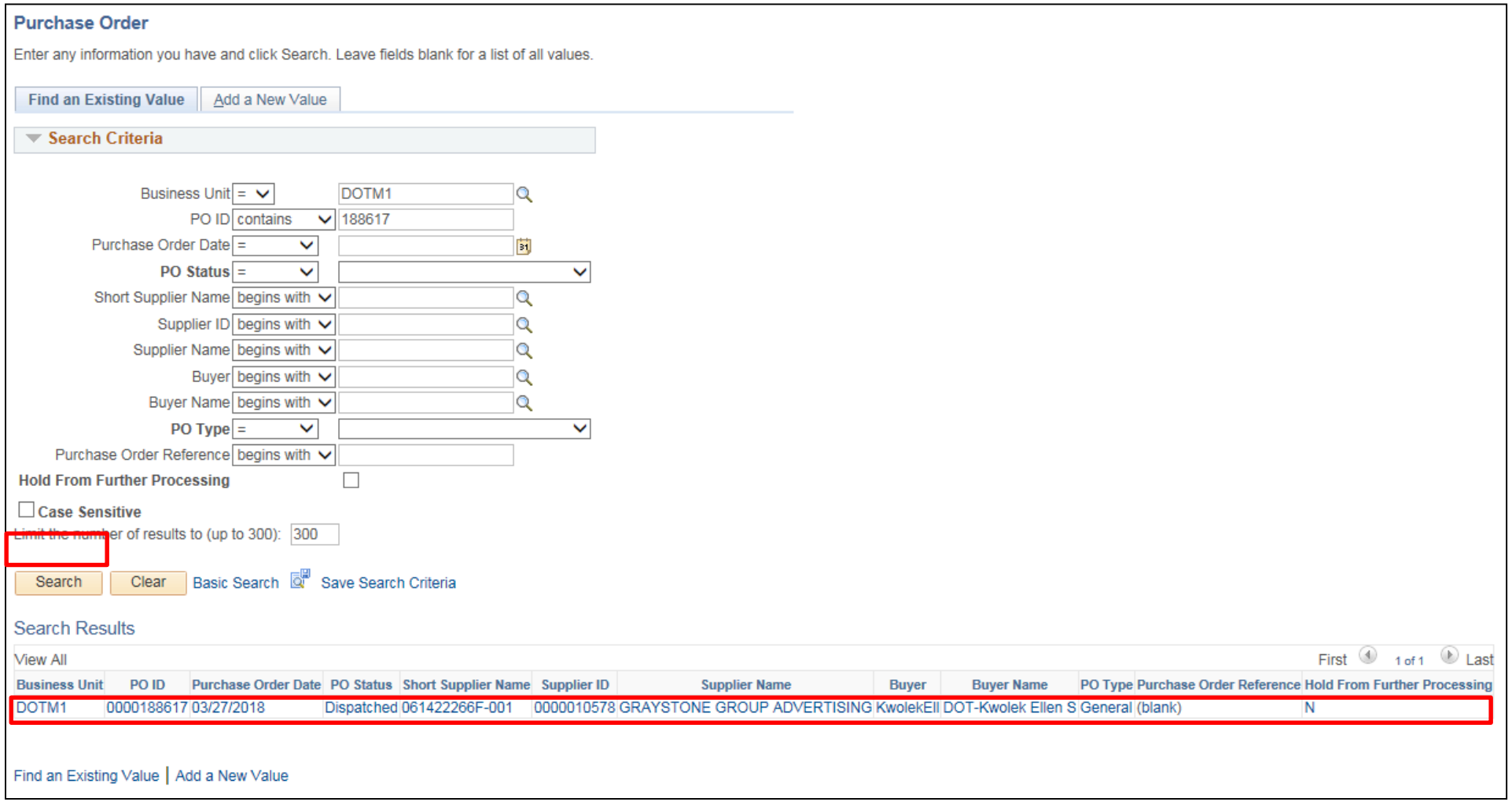
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000188617 or 188617)* *(Illustrated below)*



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

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

PO Status Dispatched
Budget Status Valid
Hold From Further Processing

Header

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

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

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

Amount Summary

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

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

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

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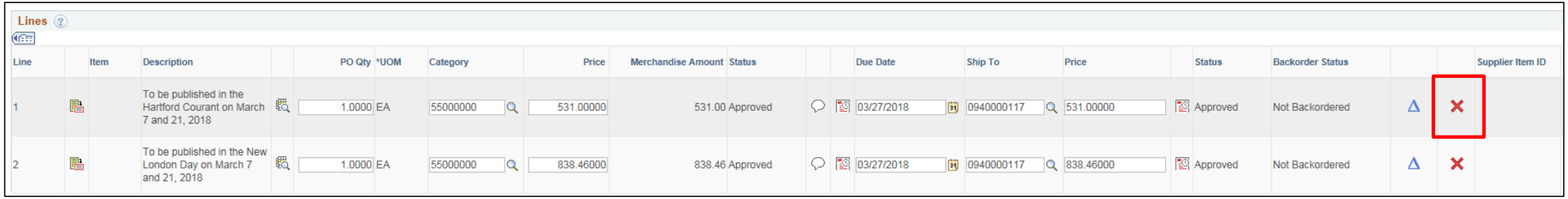
View Approvals

*Go to ... More ...

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

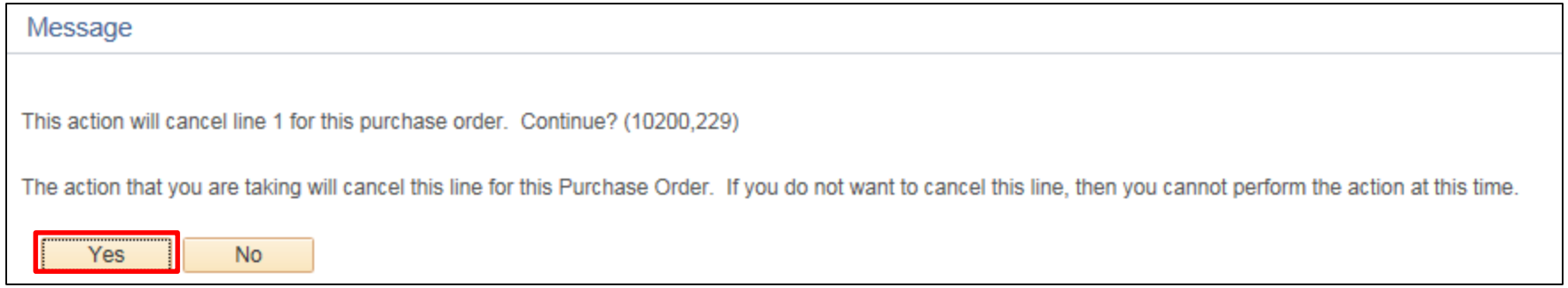
9. Click the red **X** icon on the line you would like to cancel.



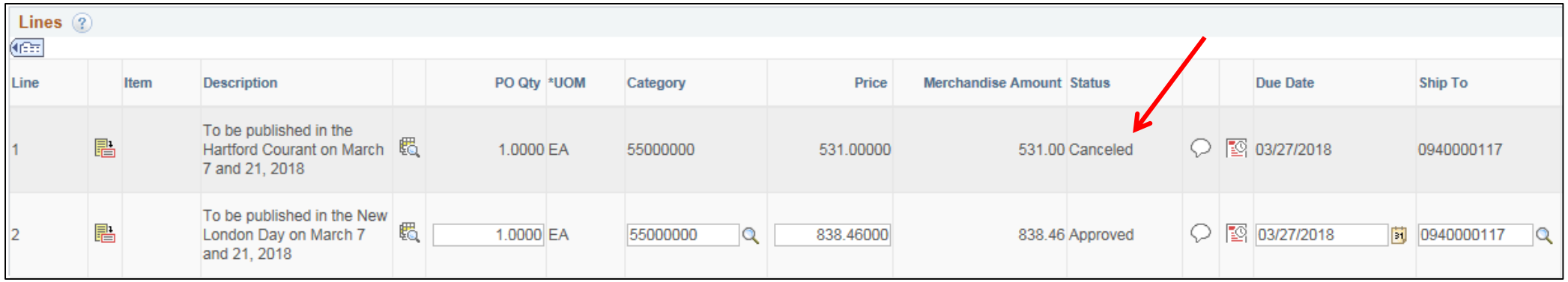
Lines

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

10. Click **'Yes'** to confirm the cancelation.



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



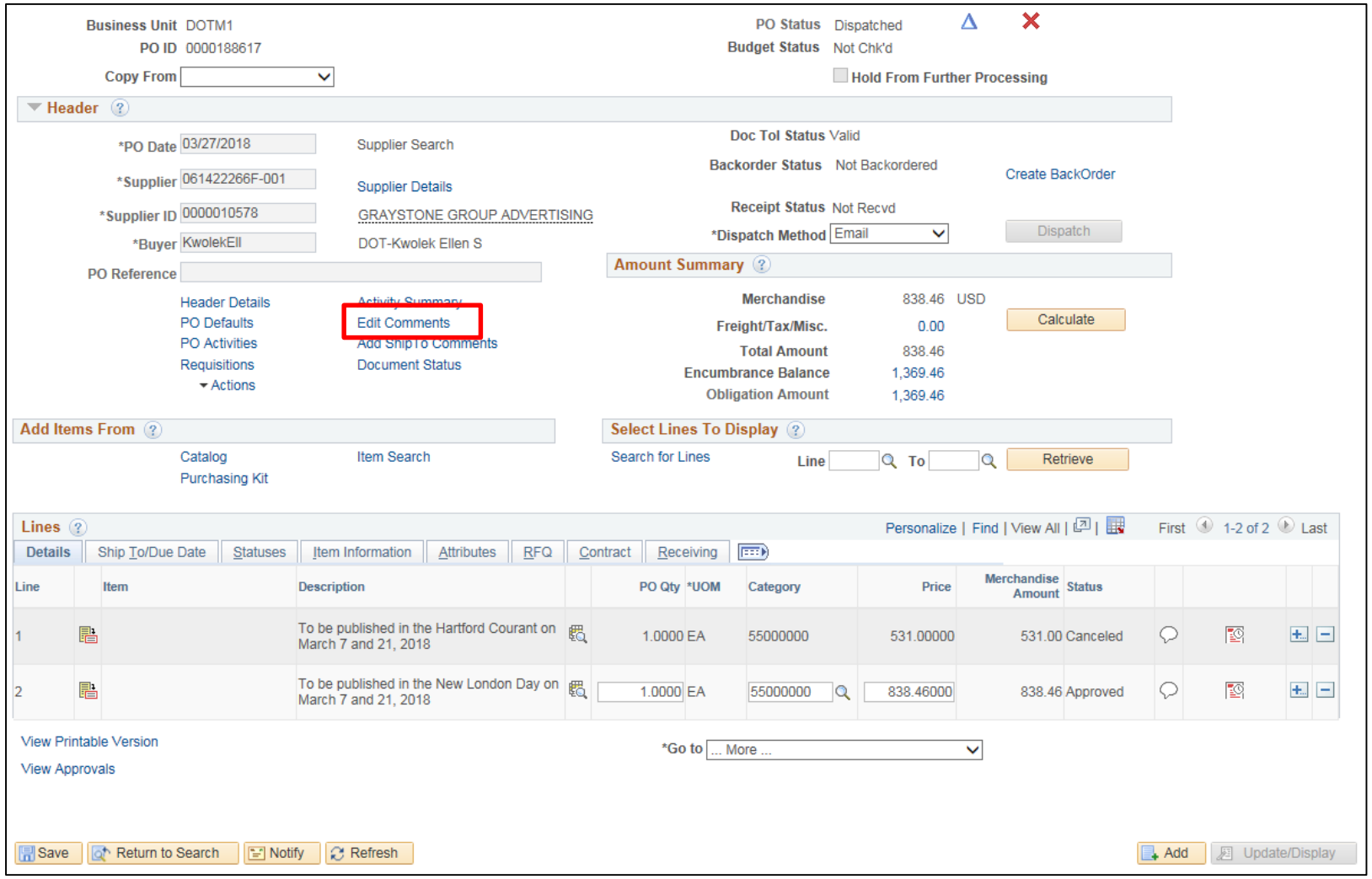
Lines

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

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

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

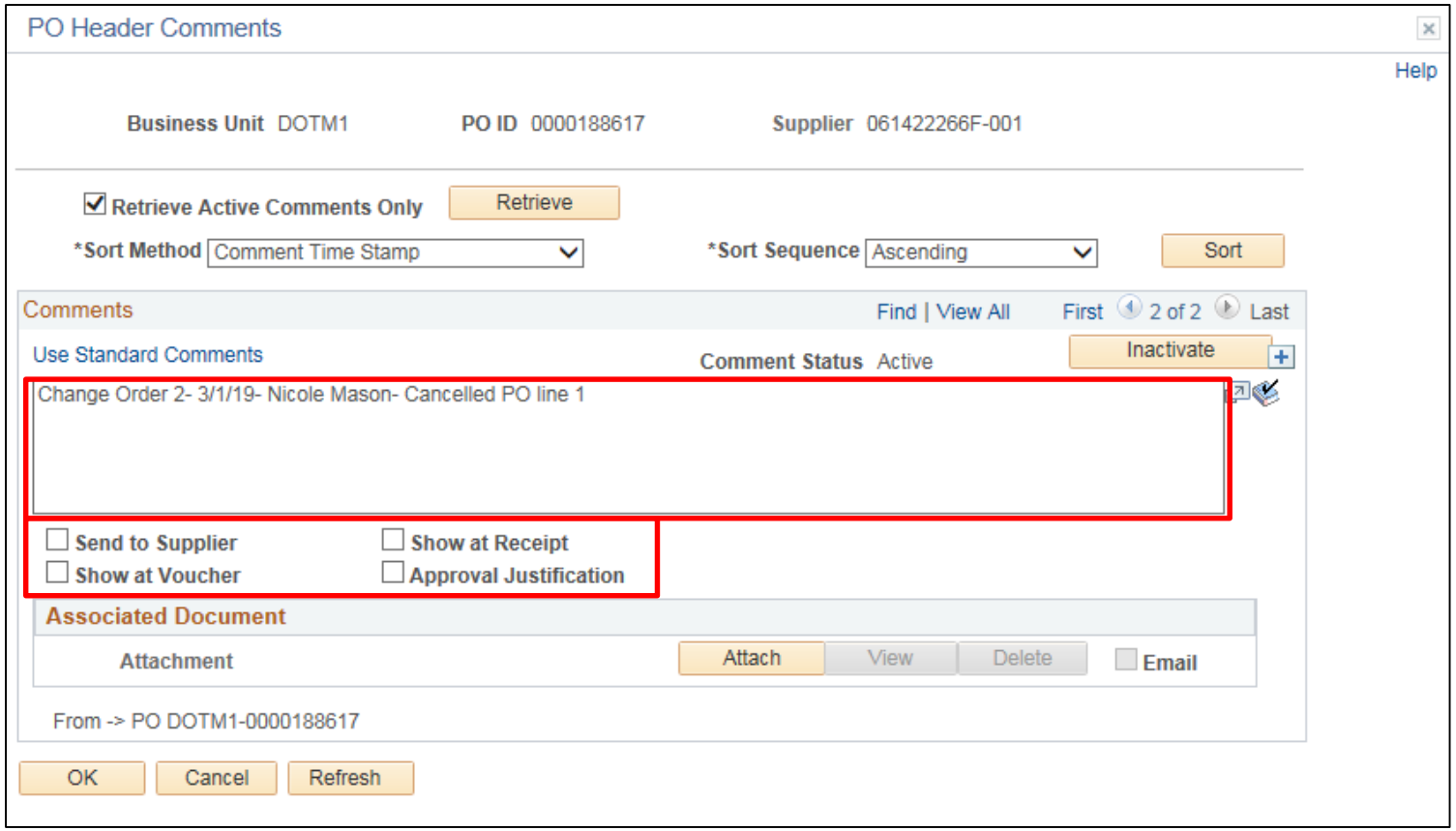
Click the **'Add Comments'** link.
(**NOTE:** If comments already exist in the PO Header the link will display as **'Edit Comments'**.)



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

12. Enter the change order comment in the **'Comments'** box indicated below– Include further details, if necessary.
    Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble located on each PO line next to the **'Status'** field.

13. The checkboxes (below the comment box) allow buyers to share comments with the Supplier, display on receipts, or display on a voucher. Check off any necessary boxes.



PO Change Order Form

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

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

Contract # or GL Authorization: 12PSX0051AA

Vendor Name: Graystone Group Advertising

PO #: 0000188617

Change Order #: 1

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

Old Committed Dollar Amount: 1,369.46

New Committed Dollar Amount: 1,363.46

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

Date Submitted: 4/23/2018

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

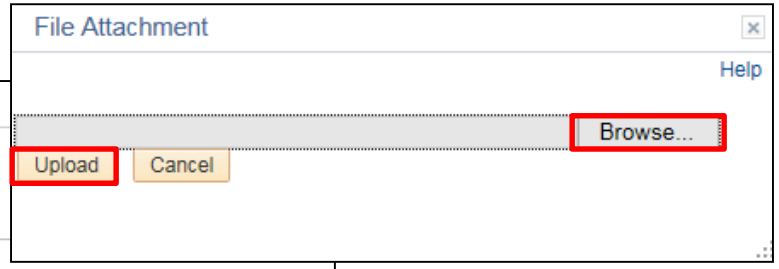
Please note that the change order itself must note the change order number and description of the change in the header comments section of the change order.

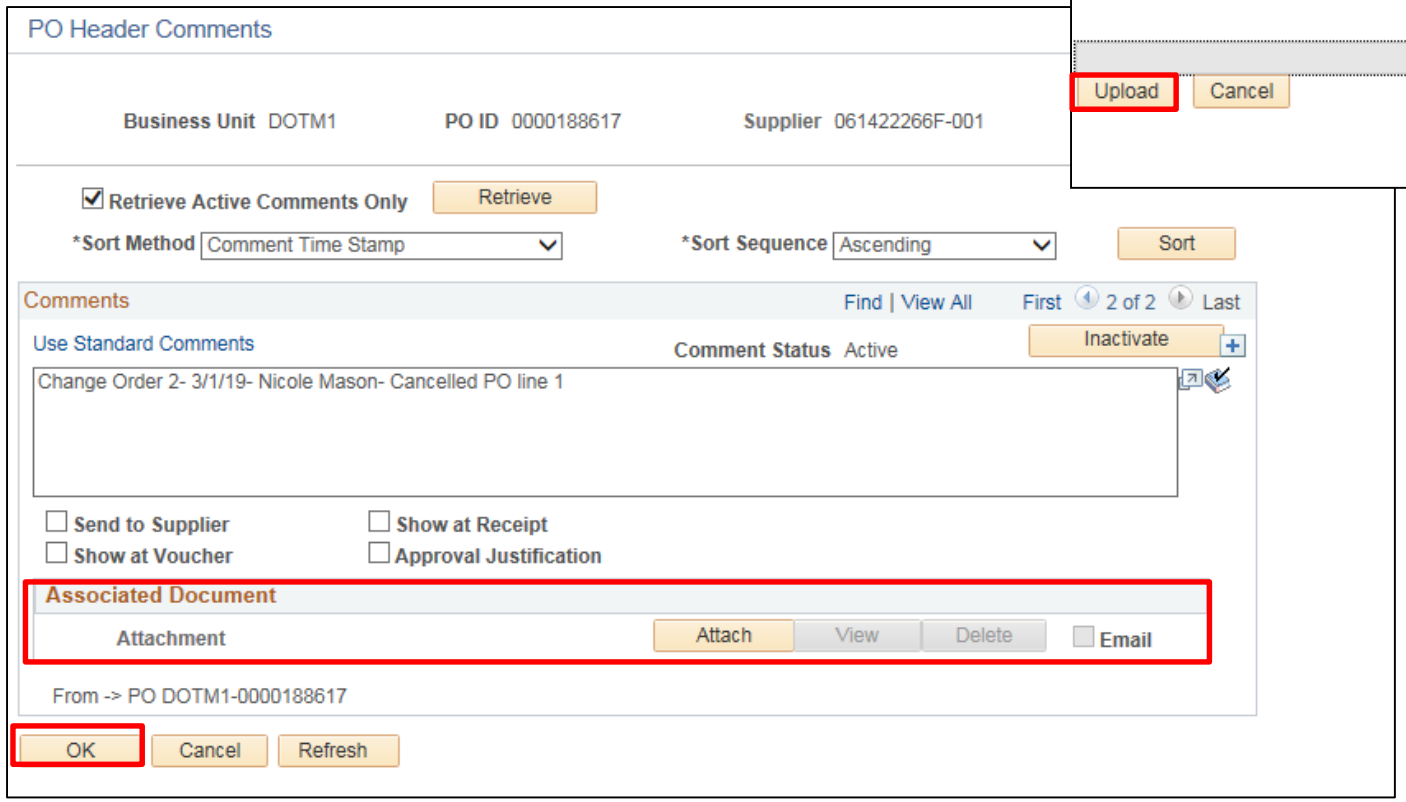
Change Order Request Form Revised 04/12/13

Change Order Request Form (SAMPLE)

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

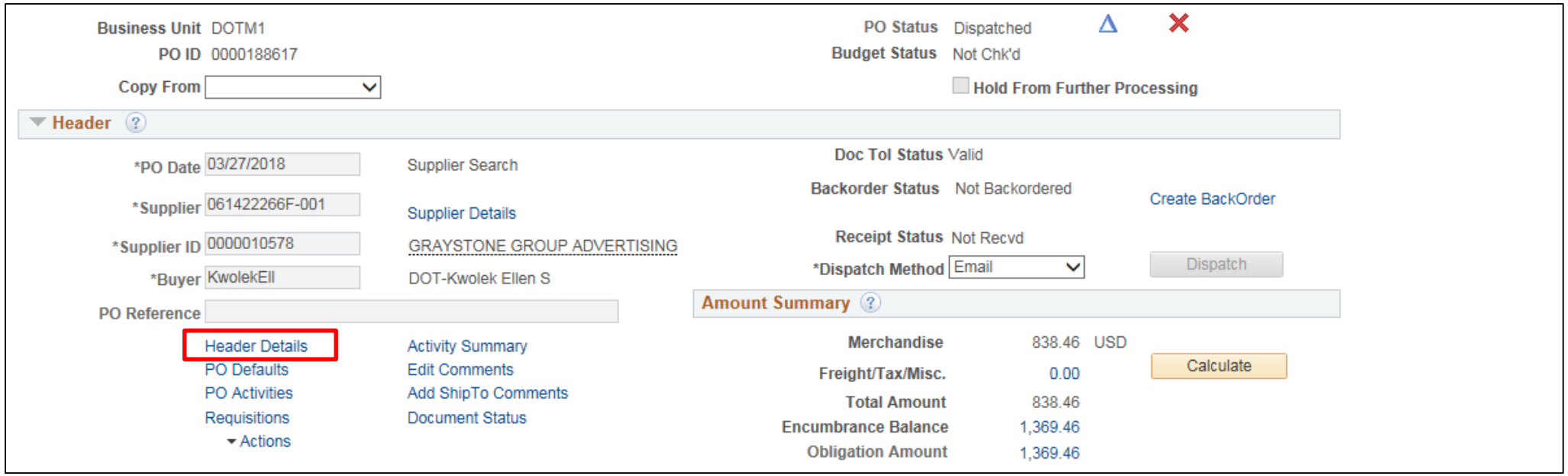
15. Complete the **Change Order Form** with the appropriate information.
16. Save a copy of the form to your computer. It is helpful to include the PO ID in the filename, as shown below.
17. Click the **'Attach'** button to attach the completed form to the change order comment. Attach
18. Click **'Browse'** 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.
20. Click **'OK'** to exit.





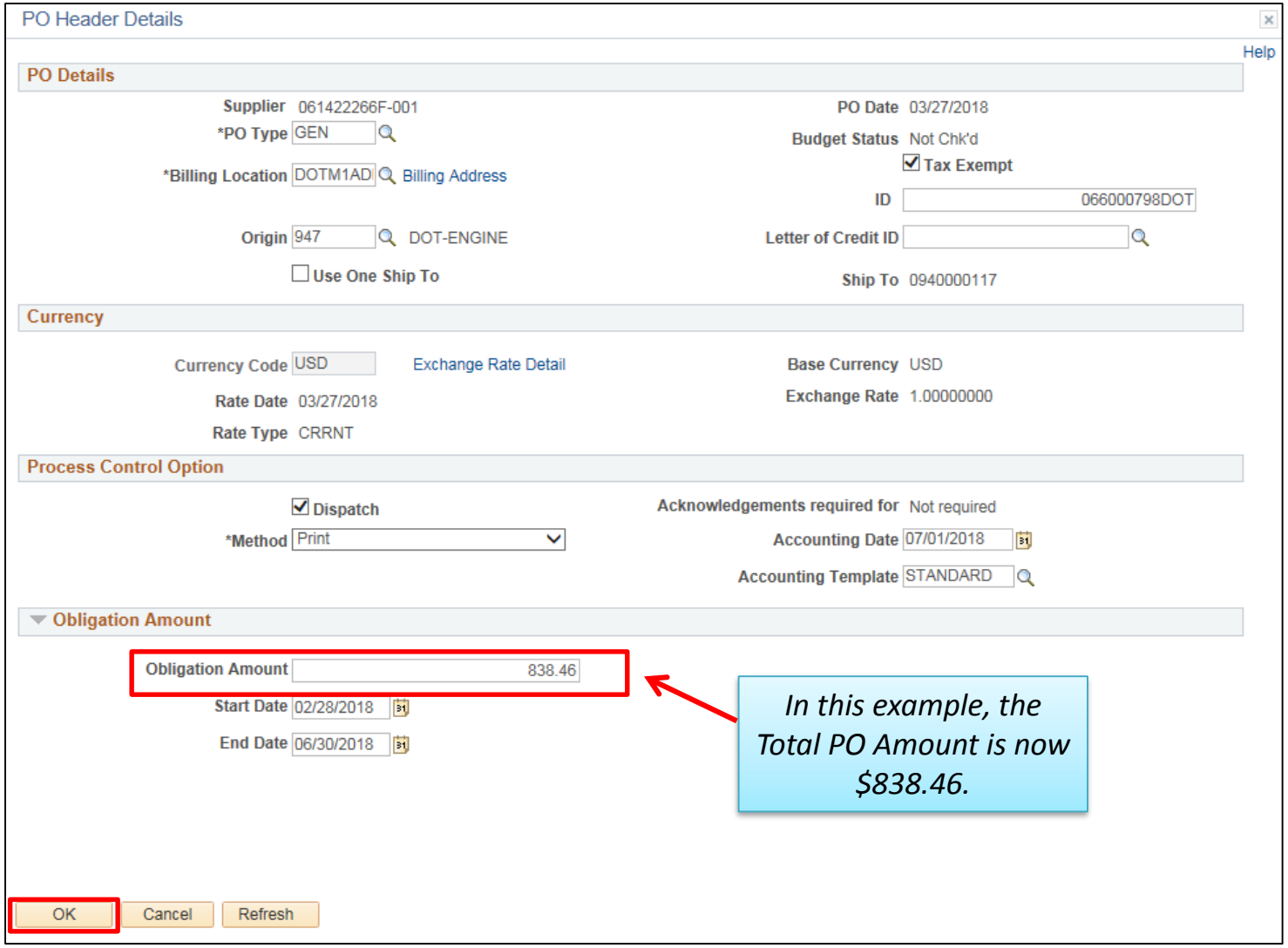
PO Change Orders: Cancel a PO Line (No Activity ONLY)

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



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

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'**.



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

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

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

Maintain Purchase Order

Purchase Order

Business Unit DOTM1
PO ID 0000188617
Copy From

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

Header

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

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

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

Amount Summary

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

Calculate

PO Obligation is now updated.

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

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

View Printable Version
View Approvals

*Go to ... More ...

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

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

Header

*PO Date 03/27/2018 Supplier Search

*Supplier 061422266F-001 Supplier Details

*Supplier ID 0000010578 GRAYSTONE GROUP ADVERTISING

*Buyer KwolekEll DOT-Kwolek Ellen S

PO Reference

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

Doc Tol Status Valid

Backorder Status Not Backordered Create BackOrder

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

Amount Summary

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

Calculate

Add Items From

Catalog | Item Search
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

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

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

View Printable Version
View Approvals

*Go to ... More ...

Save | Return to Search | Notify | Refresh | Add | Update/Display

Cancel a PO
(No Activity ONLY)

This action WILL initiate a change order

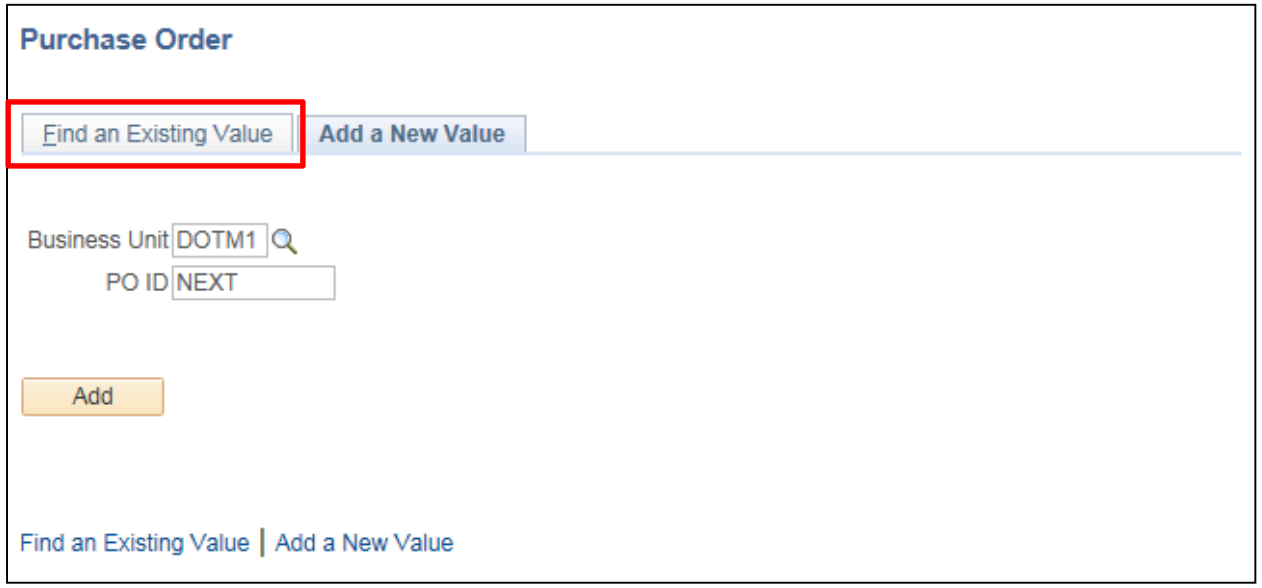
PO Change Orders: Cancel a PO (No Activity ONLY)

IMPORTANT: <u>A PO LINE CAN ONLY BE CANCELED IF THERE HAS BEEN NO ACTIVITY (ZERO EXPENDITURES).</u>
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'**.

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

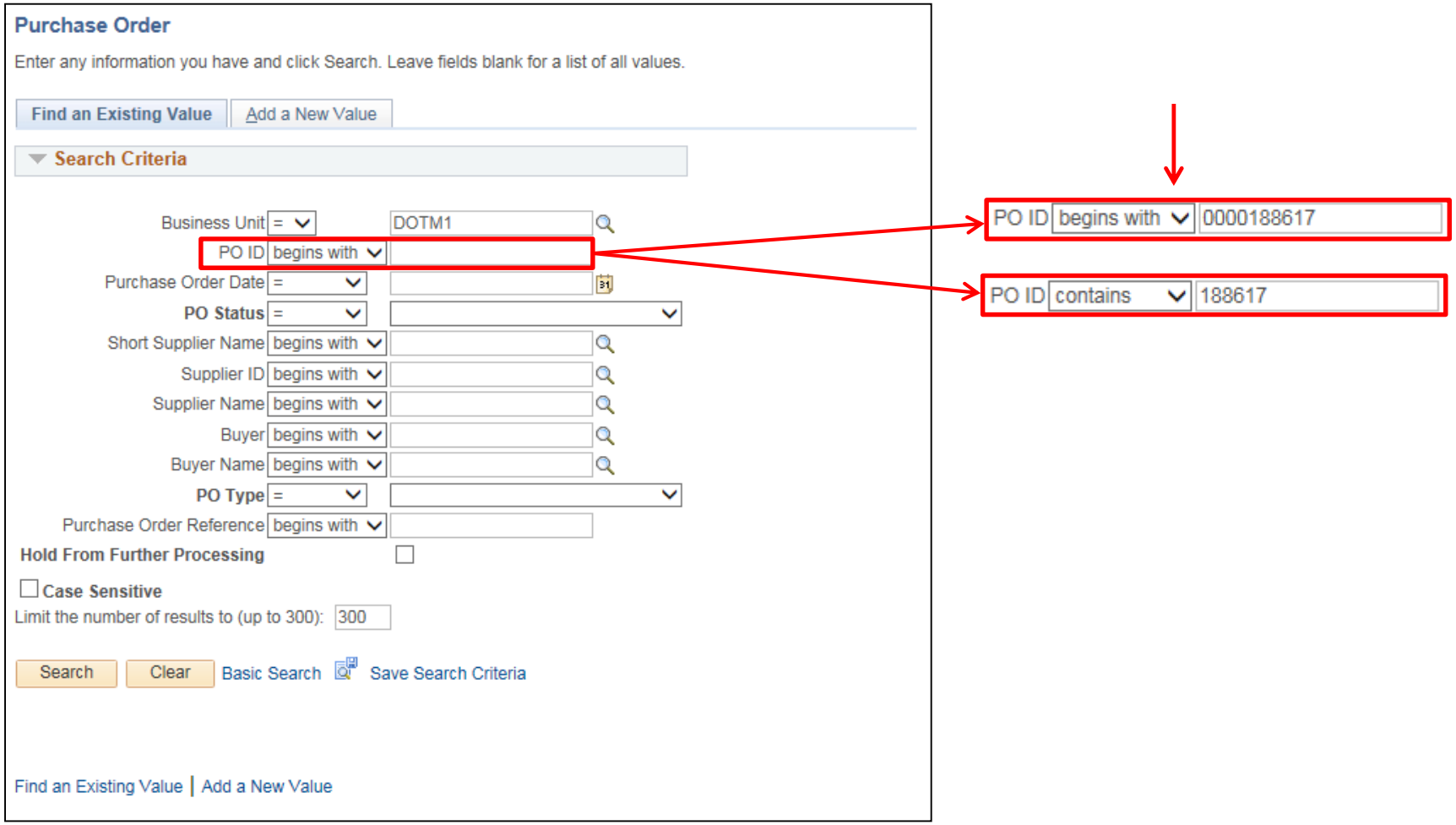
2. Select the **'Find an Existing Value'** tab.



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

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

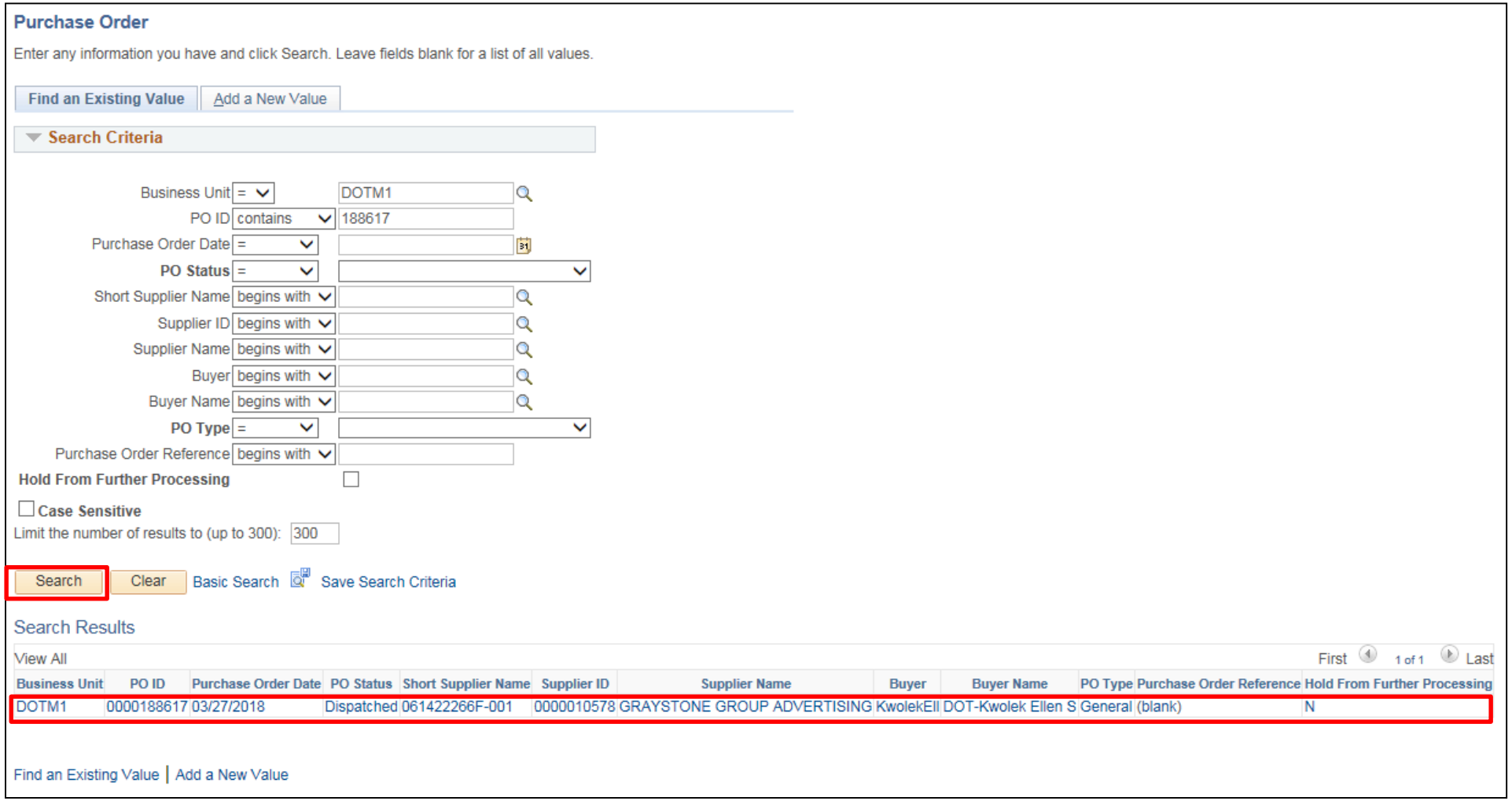
   You also have the option to change the drop-down column [begins with] next to **'PO ID'** to *contains*, and search by a section of the PO ID or exclude the leading zeros. *(Example: 0000188617 or 188617)* *(Illustrated below)*



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

5. Click **'Search'**.
6. Click on the **'PO ID'** hyperlink in your Search Results.

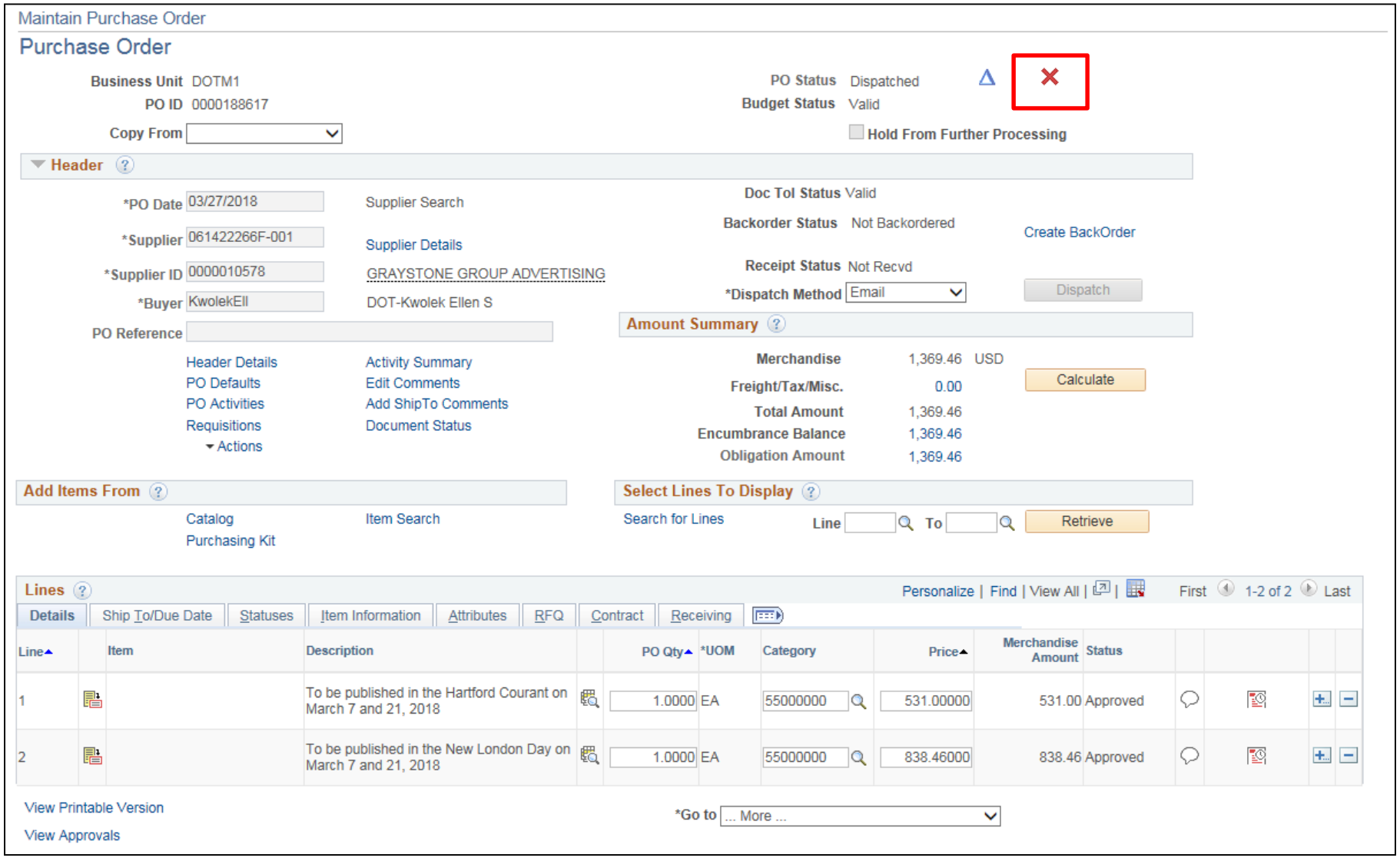
   If the PO ID is complete with leading zeros, Core will not display search results but will instead take you directly to the PO.



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

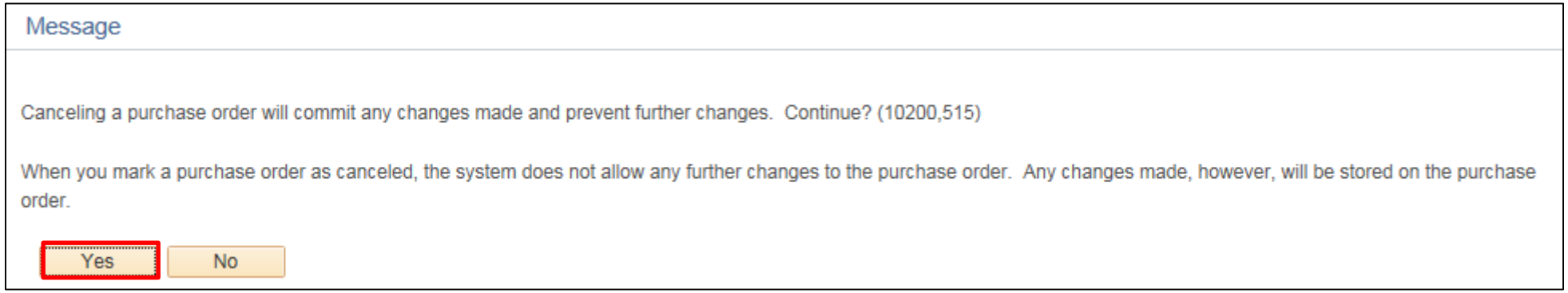
IMPORTANT: <u>A PO CAN ONLY BE CANCELED IF THERE HAS BEEN NO PO ACTIVITY (ZERO EXPENDITURES).</u>

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



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

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



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

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