## **PO Change Orders**

### **Core Support Training**

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For all other change order inquiries please contact <a href="mailto:DOTCore.Support@ct.gov">DOTCore.Support@ct.gov</a>



# Modify Price/Dollar Amount or Quantity

(This action WILL initiate a change order)



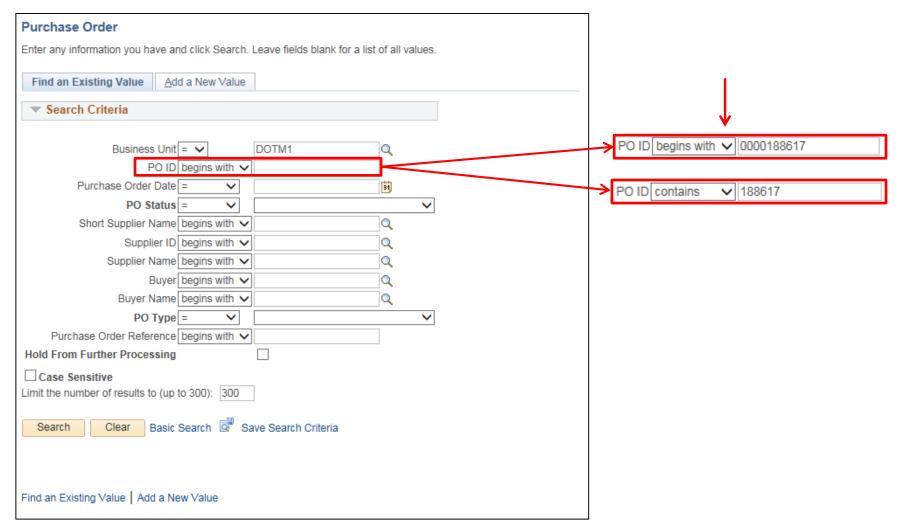
1. Navigate to 'Add/Update POs'.

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)  $\Delta$  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	<del>.</del> –
	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 \		<b>Δ</b>					
	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			<b>F</b> a aum	Total Amount brance Balance	1,020,203.34						
		<ul> <li>Actions</li> </ul>						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		<b>.</b>
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	<b>F</b>	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	<del>.</del> –
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	<b>'Chang</b> 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)



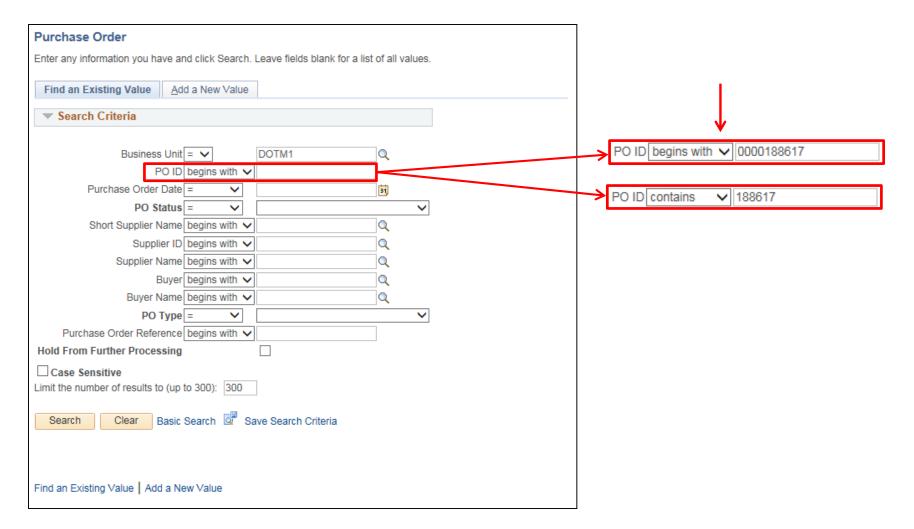
1. Navigate to 'Add/Update POs'.

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	<b>E</b>	1.0	0000 EA	550000	000 Q	53	1.00000		531.00	Appro	ved	0	2	Β	<del>.</del> . –
2	1				To be published March 7 and 21,		Londo	n Day on	<b>R</b>	1.0	0000 EA	550000	000 Q	83	3.46000		838.46	Appro	ved	Q	12		<b>H</b>
		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'.

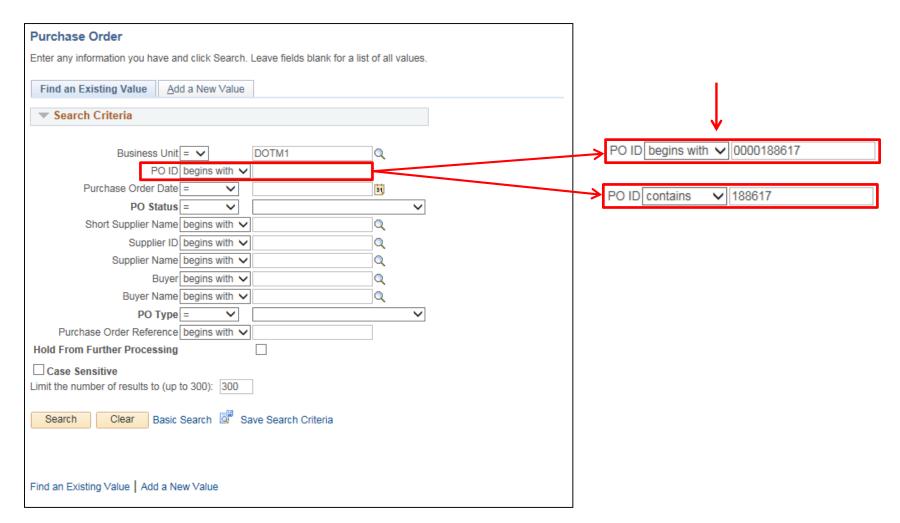
Main Menu 👻 > Core-CT Financials 🕶 > Purchasing 👻 > Purchase Orders 💌 > Add/Update POs

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			<b>i</b>				
- 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	<b>E</b>	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)  $\Delta$  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				
		<ul> <li>Actions</li> </ul>								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		<b>5</b>		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	<b>Request Form</b>		
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

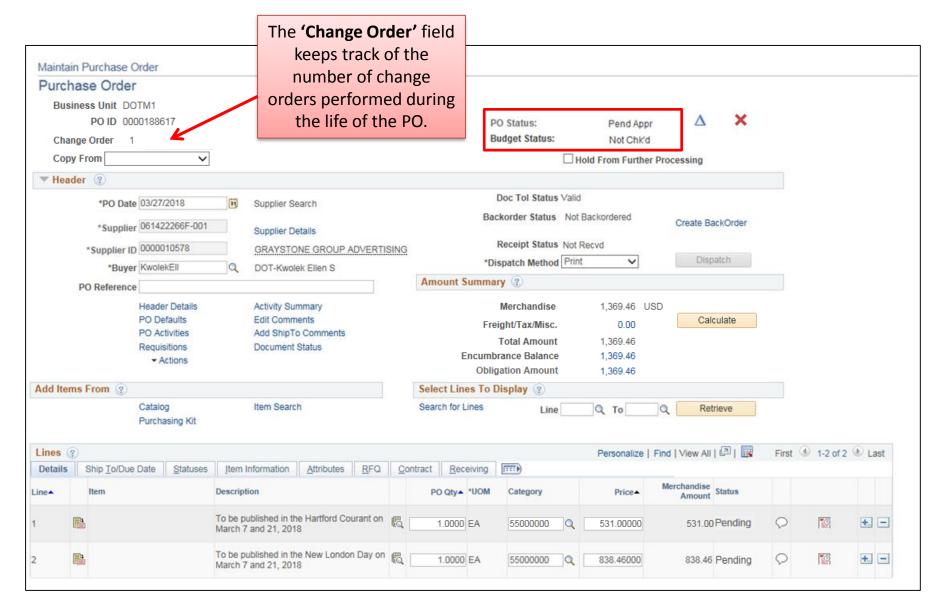
File Attachment

- 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'.

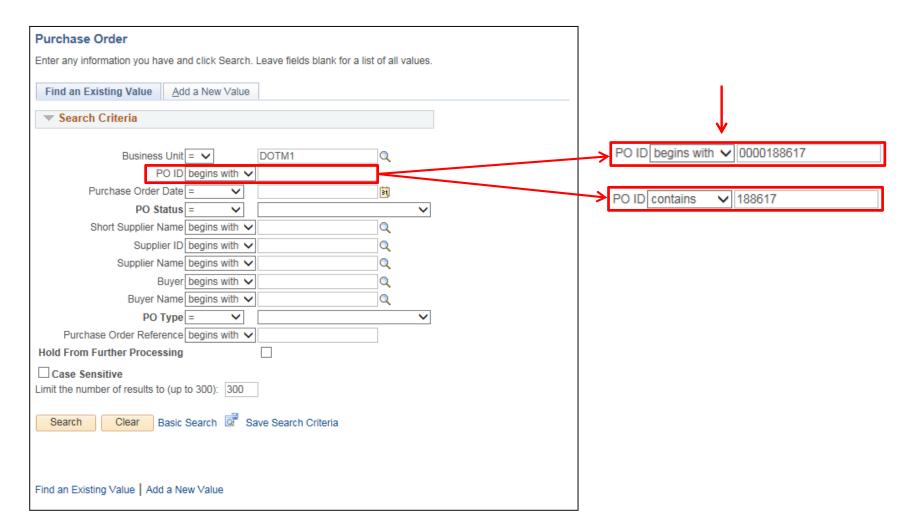
2. Select the **'Find an Existing Value'** tab.

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 <b>-</b> 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	<b>+</b>
	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**)  $\Delta$  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		<b>E</b>	1.0000	EA	55000000	Q [	838.46000	838.46	Approved	0	1	<b>+</b> . –
	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	<b>.</b> –
View Prir	ntable Version							*Go t	o More			~				
View App	provals															

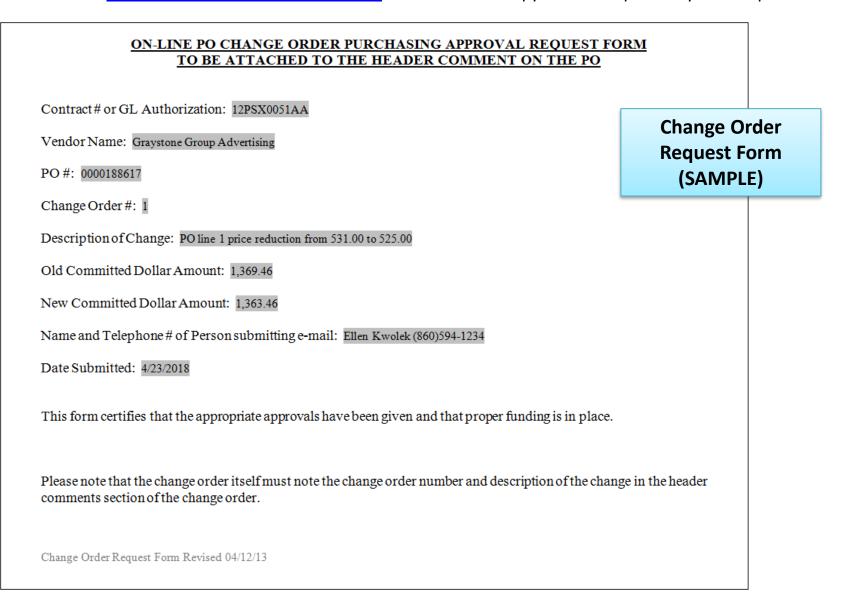
- 13. Enter the change order comment in the 'Comments' box shown below– Include further details, if necessary.
   Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble O located on each PO line next to the 'Status' field.
- 14. The 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 <b>'Save'</b> 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 <b>'Change Ord</b> 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	<b>.</b> -
	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'.

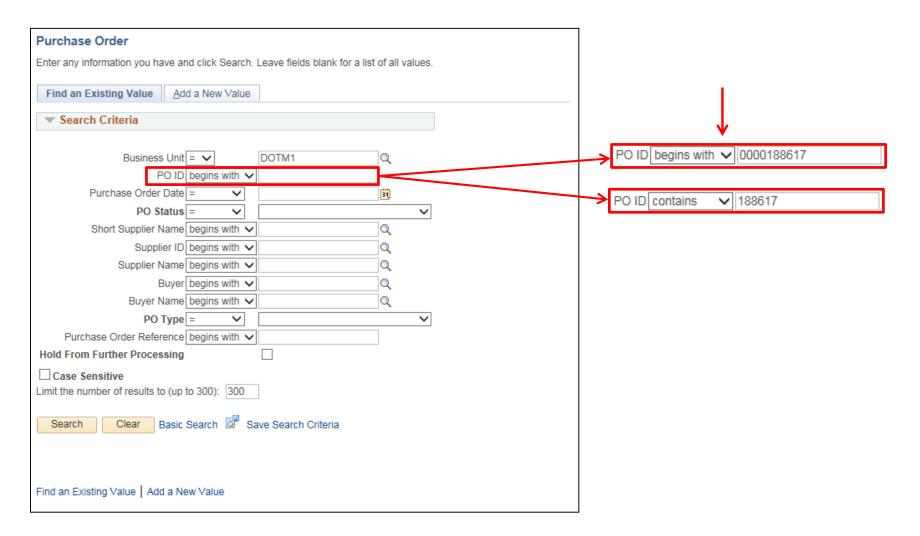
Main Menu 👻 > Core-CT Financials 👻 > Purchasing 👻 > Purchase Orders 👻 > Add/Update POs

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

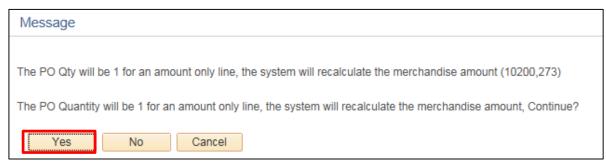
7. Click the **'Line Details'** icon on the PO line you would like to adjust. 📑

/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  $\Delta$  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	<ol> <li>1-2 of 2</li> </ol>	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>

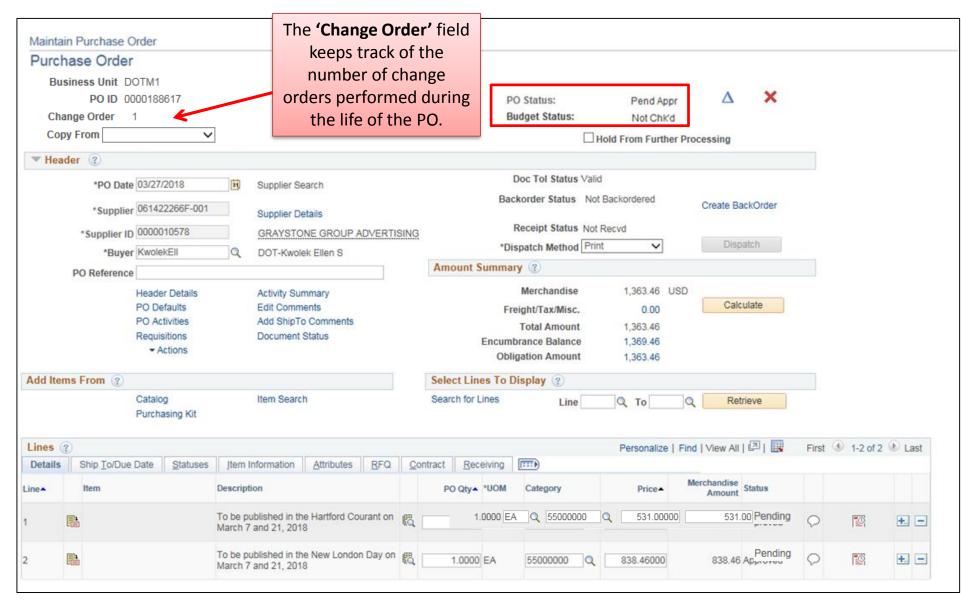
ON-LINE PO CHANGE ORDER PURCHASING APPROVAL REQUEST F TO BE ATTACHED TO THE HEADER COMMENT ON THE PO	ORM	
Contract # or GL Authorization: 12PSX0051AA Vendor Name: Graystone Group Advertising PO #: 0000188617	Change Oro Request Fo (SAMPLE	rm
Change Order #: 1 Description of Change: PO line 1 price reduction 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 <b>'Save'</b> 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'.

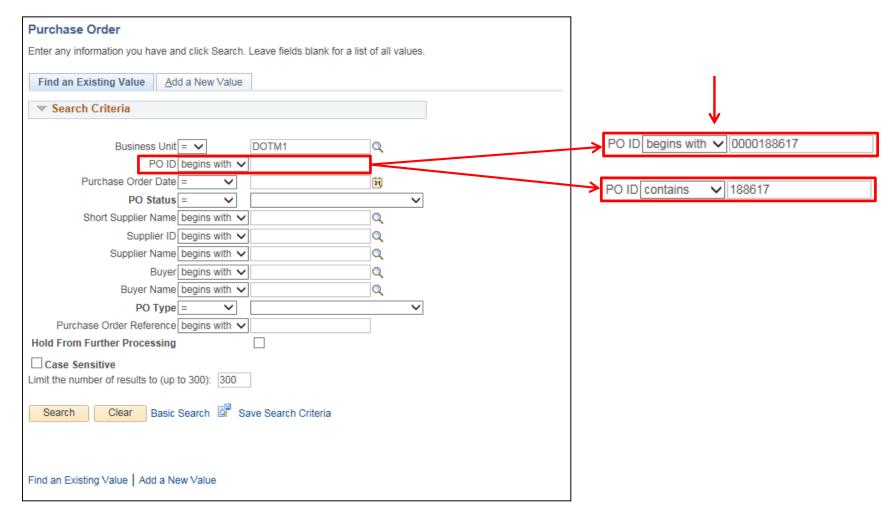
Main Menu 👻 > Core-CT Financials 🔹 > Purchasing 😴 > Purchase Orders 😴 > Add/Update POs

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)  $\Delta$  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	<del>+.</del> -
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	<b>+</b>

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	

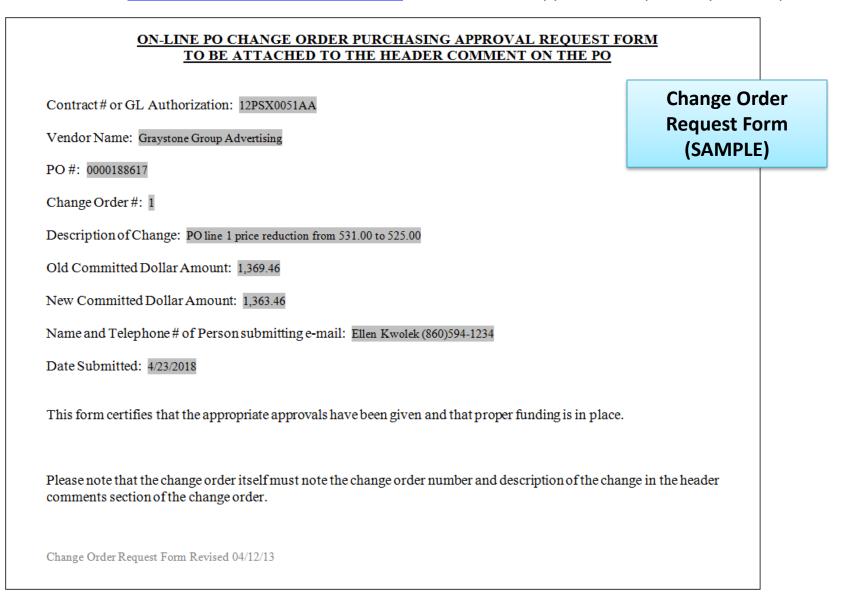
- 28. Enter the change order comment in the 'Comments' box indicated below– Include further details, if necessary.
   Note: In addition to the header comment, you may also leave an individual comment on each line by clicking the quote bubble O located on each PO line next to the 'Status' field.
- 29.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

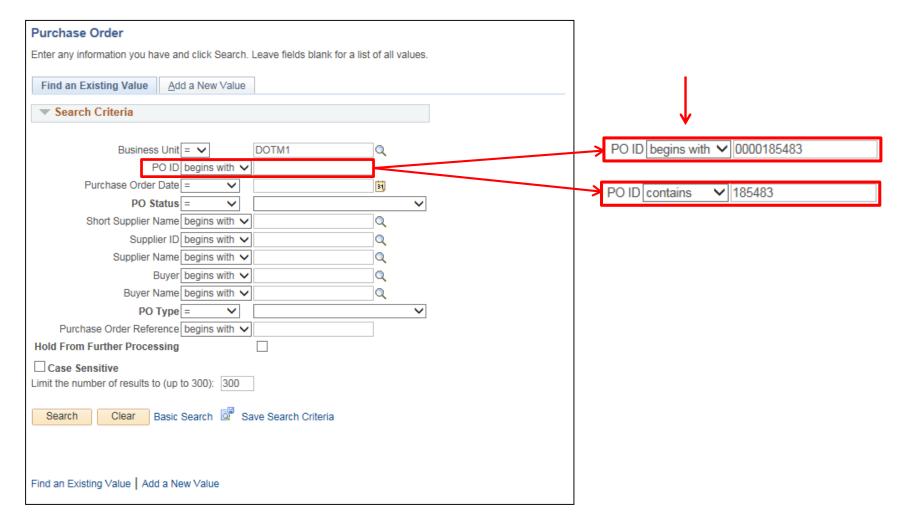
Main Menu 👻 > Core-CT Financials 👻 > Purchasing 👻 > Purchase Orders 👻 > Add/Update POs

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)  $\Delta$  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 <b>M</b> e	rchan	dise Am	t 4	450,000.0	00 USD
Schedule	es							Personalize   Find	View All   💷		First	<b>1</b>	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	<b>ions</b> (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 <b>'Qty'</b>			
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	<b>+</b> . [	-
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.)

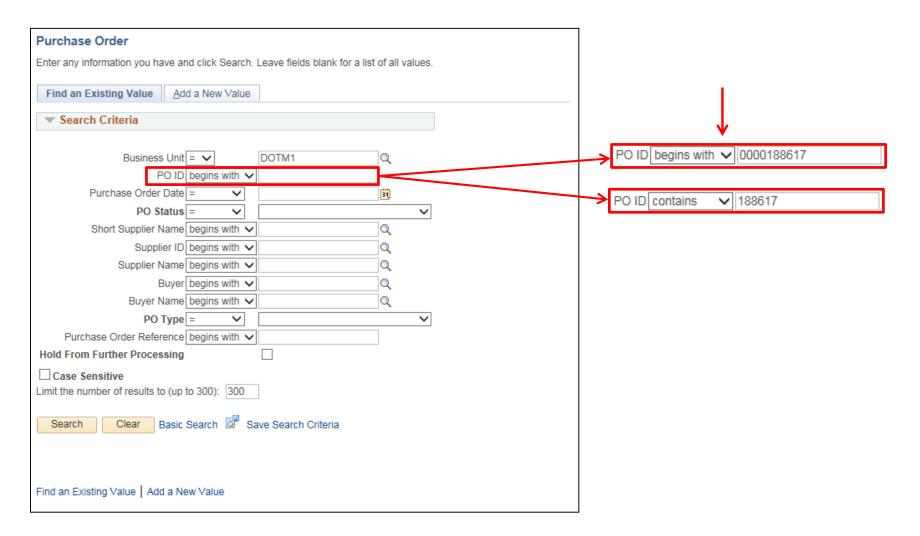
1. Navigate to 'Add/Update POs'.

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)  $\Delta$  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					
``````````````````````````````````````	<ul> <li>Image: A start of the start of</li></ul>				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		.,					
<ul> <li>Actions</li> </ul>										
		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					
		<sup>1</sup> 🕰	1.0000 EA	55000000	Q 531.0000	531.	00 Approved	Q	1	<b>+</b> .
	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	$\bigcirc$		<b>.</b>
	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	<b>1</b>		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	<b>1</b>		To be published in the New London Day on March 7 and 21, 2018	1.0000 EA	5500000 <b>Q</b>	838.46000	838.46 Appro	roved 🖓	1	03/27/2018	0940000117	838.46000	<b>1</b>	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	<b>1</b>		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	₽ <b>₽</b>		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	<del>.</del> –
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		<b>+</b> . –	
	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											
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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	<b>.</b>
			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	<b>H</b> .
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.)

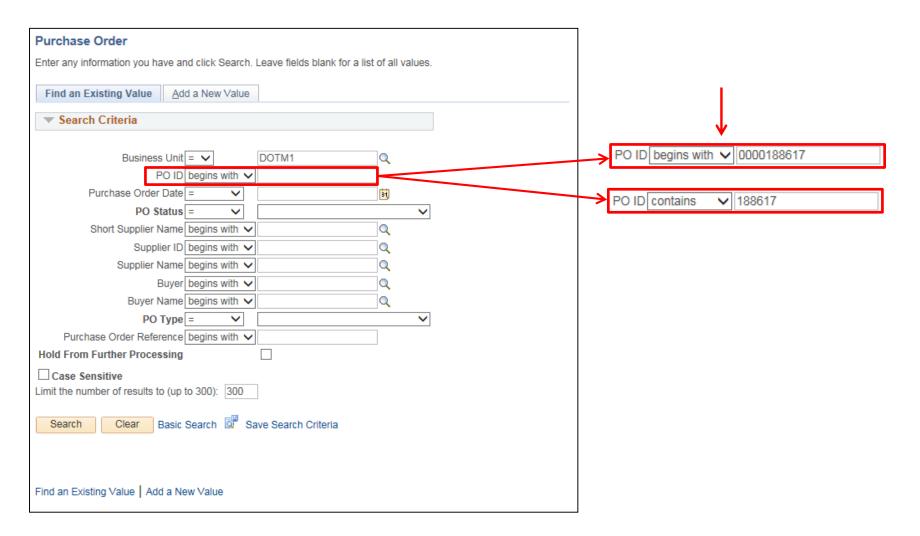
1. Navigate to 'Add/Update POs'.

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	<b>E</b>	1.0000 EA	55000000	٩	531.00000		531.00	Approved	Q	2	<b>+</b>	-
2	To be published in the New London Day on March 7 and 21, 2018	<b>E</b>	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.