
End-User Training Guide

Course Code: SCM 202

Course Title: Manage and Record Purchase Orders

Course Overview

Course Description

This course provides a comprehensive review of the Purchase Order processes. This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Manage and Record Purchase Orders
- Module 3: Course Summary

Training Audiences

The following audience(s), by INFORMS Security role(s), are required to complete this course before being granted related system access

- Department Buyer
- Department PO Processor

Prerequisites

Participants are required to complete the following End-User Training courses before starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- SCM 101 – Supply Chain Management Fundamentals
- SCM 201 – Manage and Record Requisitions

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 3 hours.

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Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations, Activities and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To get the most benefit from this course, participants should:

- Actively participate in class, and ask questions as needed
- Turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

Learning Objectives

At the conclusion of this course, participants will be able to:

- Understand the End-to-End Process for Managing and Recording Purchase Orders
- Enter and Maintain Purchase Orders
- Approve Purchase Orders
- Process Purchase Orders
- Change Purchase Orders

Module 1: Course Introduction

Training Audience: Roles and Responsibilities

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

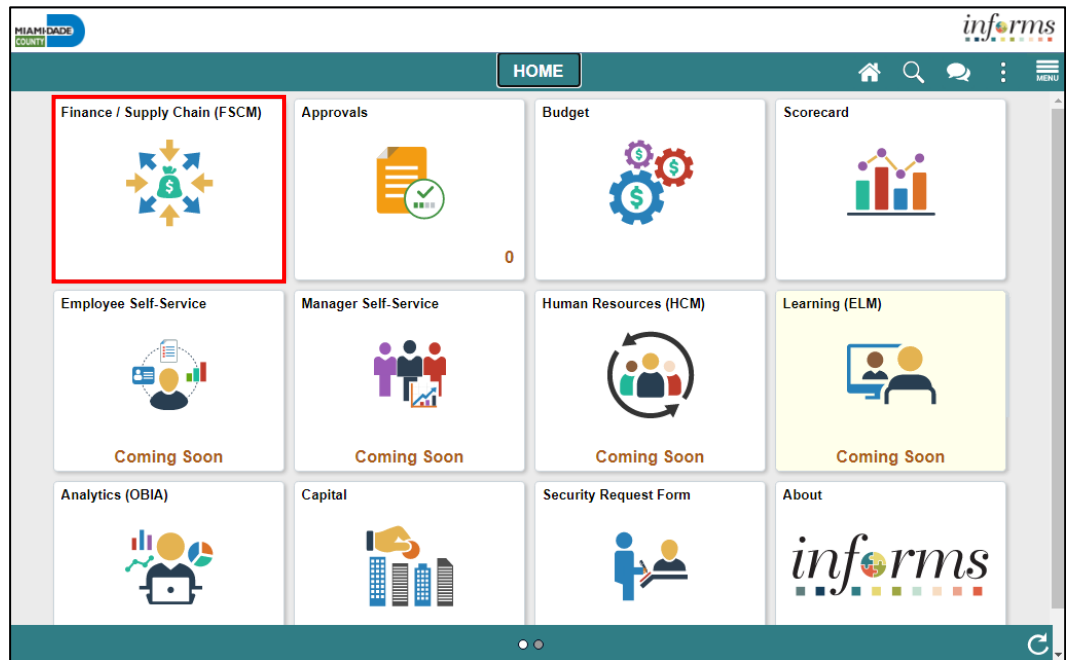
- **Department Buyer:** The Department Buyer can create and update Purchase Orders (POs), create PO Change Orders, Budget Check POs, and Dispatch POs.
- **Department PO Processor:** The Department Requisition Processor has the ability to enter and update request including close, cancel, and amend actions.

Module 1: Course Introduction

Navigation

Below are the steps to navigate to the Buyer page, which will be used for navigation in the rest of this course:

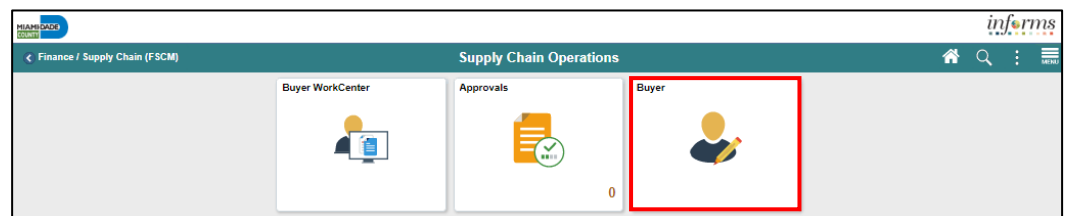
1. Login to INFORMS and select **Finance/ Supply Chain (FSCM)** from the home landing page below:



2. Select **Supply Chain Operations**.



3. Select **Buyer**.



Module 1: Course Introduction

Key Changes to the Business Process

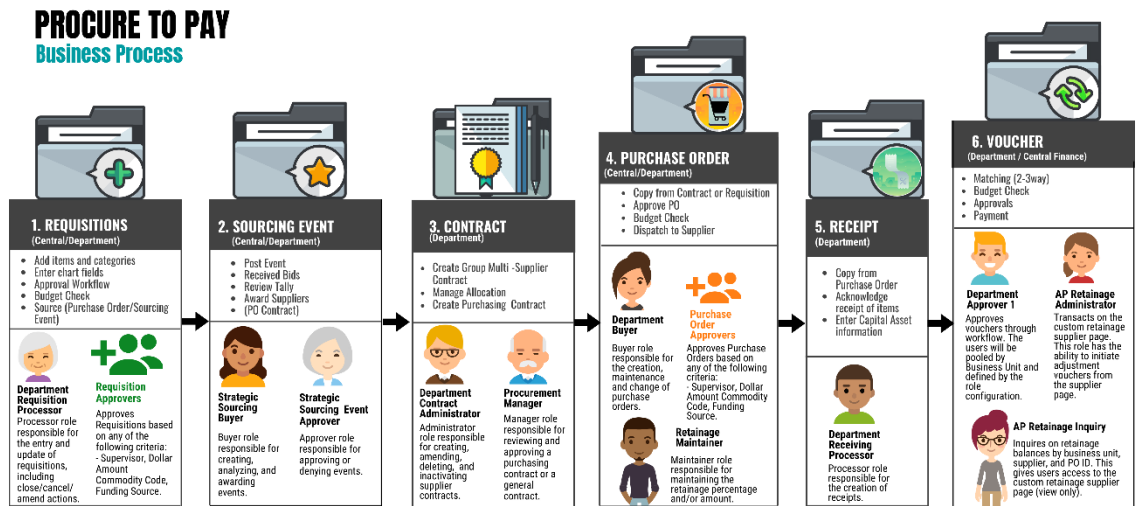
The INFORMS Supply Chain Management (SCM) provides the ability to manage the lifecycle of capital projects and the procurement of goods and services. The modules provide the functionality to request, solicit, contract, procure, receive, and pay for goods, services.

The Key Changes to the Manage and Record Purchase Orders business process include:

- Copying from functionality (i.e. requisition, contract, Purchase Order)
- Online dispatching to supplier

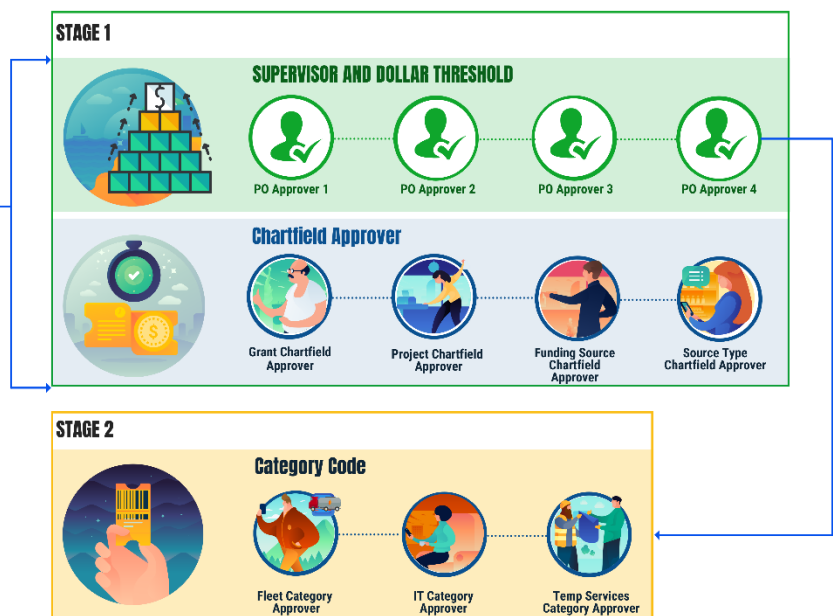
Module 1: Course Introduction

The End-to-End Business Process



PO WORKFLOW

User Submit Purchase Order for Approval



Module 1: Course Introduction

Introduction to Demonstrations Activities, and Exercises

User will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises- The definitions and descriptions of each are below.

Instructor Demonstrations



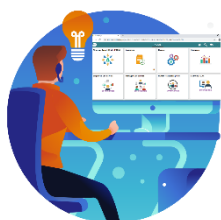
Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. The instructor will show how to perform these activities while users follow along.

Training Activities



User will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The Instructor will ask questions related to the lecture content and training activities, which are used to check user's knowledge and understanding of course content.

Module 1: Course Introduction

- Module 1:** The following key concepts were covered in this module:
Course
Introduction
Summary
- Course Administration and Logistics
 - Learning Objectives
 - Roles and Responsibilities
 - Navigation
 - Key Changes to the Business Process
 - The End-to-End Business Process
 - Introduction to Demonstrations, Activities and Exercises

Module 2: Manage and Record Purchase Orders

Lessons

This module includes the following lesson:

- Manage and Record Purchase Orders

Lesson 1: Manage and Record Purchase Orders

Lesson 1: Overview

At the conclusion of this lesson, user will be able to:

- Enter and Maintain Purchase Orders
- Approve Purchase Orders
- Process Change Orders

Lesson 1: Manage and Record Purchase Orders

Key Terms

The following key terms are used in this Lesson:



Term	Definition
Budget Checking	The process used to ensure that the expense transactions meet the requirements of the Appropriation Ledger based on Fund, Department and Account roll up as well as does not exceed the available budget amount.
Buyer	A user that manages purchase orders and relationships with suppliers. All users with the Department Buyer role will have defaults established to streamline PO data entry as it defines the default information that appears on a PO for a Buyer.
Buyer's WorkCenter	Use the Buyer's WorkCenter to manage Purchase Orders. Through the Buyer's WorkCenter page, the user can analyze, dispatch, cancel, close, and print preview Purchase Orders.
Dispatch	The process that sends the purchase order to the supplier. The two most common dispatch options are: <ul style="list-style-type: none"> • Email • Print
Matching	An automated process of comparing values found in different business documents: Voucher, Purchase Order, Receiver, if applicable, and inspection (if applicable) prior to approving a Voucher for payment. This process provides assurance that the products listed on a supplier invoice were requested and received at the appropriate price and in the appropriate quantity.
PO Change Order	A change to a quantity or price to an already dispatched Purchase Order or in other words, changes to a Purchase Order that was already dispatched to a Supplier.
Supplier	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.

Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

Within INFORMS Purchasing, users can create a Purchase Order. As Purchase Orders proceed from entry to dispatch, the system tracks details and collects analysis information to facilitate future purchases. In an integrated system, INFORMS Purchasing provides Purchase Order line information to INFORMS Payables for invoice payment. A Purchase Order in INFORMS Purchasing has a tree structure whose key components are a header, lines, schedules, and distributions. A Purchase Order is identified by an ID that is unique within an INFORMS Purchasing business unit and the system generates a default Purchase Order ID number.

Certain users will have the ability to create Purchase Orders directly online in INFORMS without requiring a requisition to be created before the Purchase Order. Purchase Orders consist of four key sections which include:

1. **PO Header:** Contains information such as the Purchase Order type, receiving status, Supplier and Buyer details. Header information pertains to the entire Purchase Order.
2. **PO Line:** Contains information such as the item ID, item description, category, and quantity. PO Line Schedules and PO Line distributions are accessed through the Purchase Order line
3. **PO Line Schedule:** Every Purchase Order line has one or more due dates and external delivery locations carried on a schedule. Create a schedule for each unique delivery address and due date.
4. **PO Line Distribution:** Contains information about how the item quantity is to be charged to the organization. Distributions also contain interface information for INFORMS Accounts Payables, Project Costing, and Asset Management. A user can have more than one distribution for each schedule.

Users can create multiple Purchase Order lines, and shipping schedules to identify suppliers when and where to ship goods. Users will also have the ability to create multiple distribution lines as necessary, for example, if one has to share the cost of the purchase between departments or divisions. In addition, users can add comments and attachments as needed to a purchase order. Users can then submit the Purchase Order for approval or place it on hold. Placing a Purchase Order on hold prevents any further processing until the hold is removed.

Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

Here is the basic flow of Purchase Orders in INFORMS Purchasing:

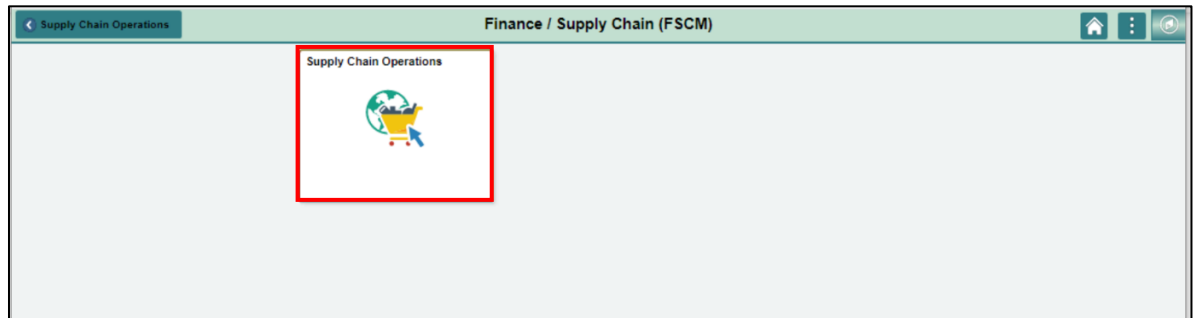
1. Create the Purchase Order either Directly Online or by using the “Copy Purchase Order from” functionality
2. Approve Purchase Order amounts, categories, and accounting information on the Purchase Order approval pages
3. Process Purchase Order through Budget Check and Dispatch to Vendors or Cancel the Purchase Order
4. (Optional) Create a Change Order against a Purchase Order
5. Receive Shipments (Discussed in the SCM 203 – Record Receipt of Goods and Services Training Course)
6. Create PO Vouchers and run the Matching process (Discussed in the FIN 212 Accounts Payable Department Approvals Training Course)

Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

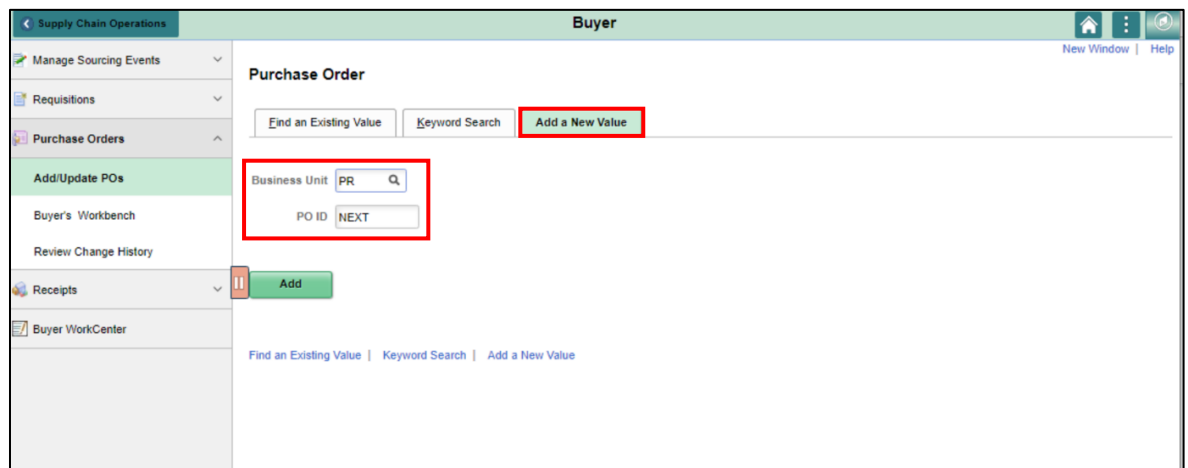
To create a new Purchase Order, user will navigate to:

1. **Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer**



2. Select **Add/Update POs** from the purchasing menu.

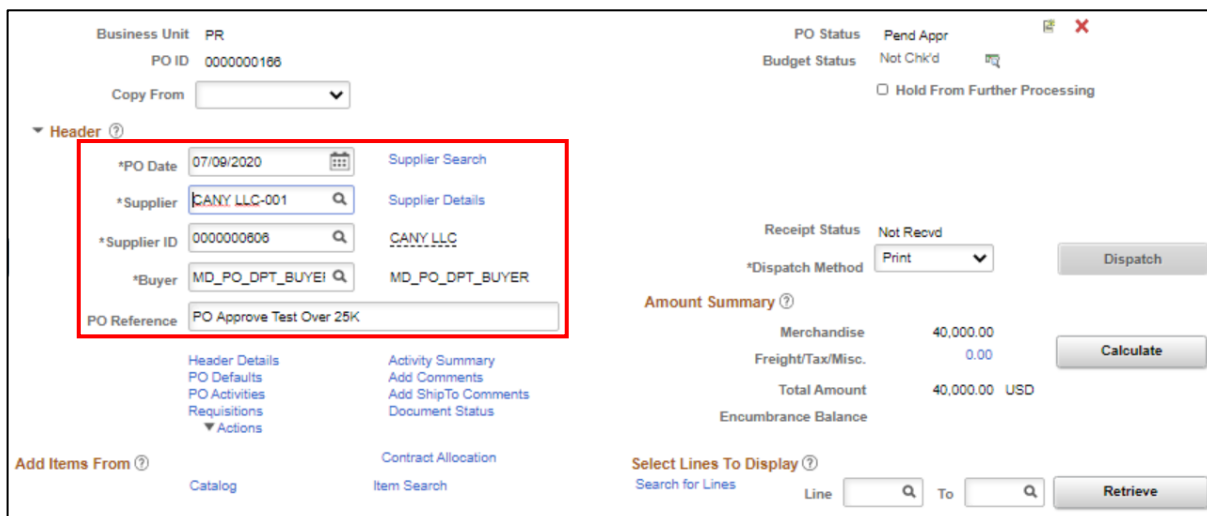
From that page, user will select the **Add a New Value** tab. The **Business Unit** field will be populated with the default Department Business Unit. The **PO ID** will default to **NEXT** which will be auto-populated to the next sequential number upon saving the Purchase Order.



Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

Upon selecting the **Add** button, the Maintain Purchase Order page will display, and user will be able to enter the **PO Header**, **PO Line**, **PO Line Schedule** and **PO Line Distribution** information.



Business Unit PR
PO ID 0000000166
Copy From

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

Header

*PO Date 07/09/2020
*Supplier CANY LLC-001
*Supplier ID 0000000806
*Buyer MD_PO_DPT_BUYER
PO Reference PO Approve Test Over 25K

Supplier Search
Supplier Details
CANY LLC

Receipt Status Not Recvd
*Dispatch Method Print
Dispatch

Amount Summary

Merchandise 40,000.00
Freight/Tax/Misc. 0.00
Total Amount 40,000.00 USD
Encumbrance Balance

Calculate

Add Items From
Catalog
Contract Allocation
Item Search
Select Lines To Display
Search for Lines
Line To Retrieve

Lines

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Stat
1		BUILDING BETTER	30.0000	EA	90923	1,000.00000	30,000.00	Pen
2		SALE OF BUILDERS	10.0000	EA	99819	1,000.00000	10,000.00	Pen

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

Save Return to Search Previous in List Next in List Notify Refresh Add

Distributions for Schedule 1

Unit PR
PO ID 0000000166
Line 1
Schedule 1
Supplier CANY LLC-001
Item BUILDING BETTER COMMUNITIES CO
Status Active

*Distribute By Quantity
SpeedChart

Schedule Qty 30.0000
Merchandise Amount 30,000.00 USD
Doc. Base Amount 30,000.00 USD

Distribution

Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Fund	Dept	*Account	Grant	PC Bus Unit	Project
1	Open	100.0000	30.0000	30,000.00	USD	MDADE	G4001	PR07030300	5470120000	NO-GRAN		

OK Cancel Refresh

Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

Another method for creating a Purchase Order is to utilize the **Copy From** functionality by selecting either Requisition, Purchase Order, or Contract from the Copy From dropdown menu at the top of the Maintain Purchase Order page. By selecting one of these items, a user can quickly create a new Purchase Order by using the data from previously entered transactions or existing INFORMS Supplier Contract details.

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID: 0000000167

Supplier:

Supplier ID:

Buyer:

PO Reference:

PO Date:

Status:

Origin:


Item ID:

Category:

Search

Select PO

Details | More Details

Select	PO ID	PO Date	PO Status	Supplier ID	Supplier
	0000000167	07/09/2020	Pending Approval/Approved	0000000606	CANY LLC-001

OK Cancel Refresh

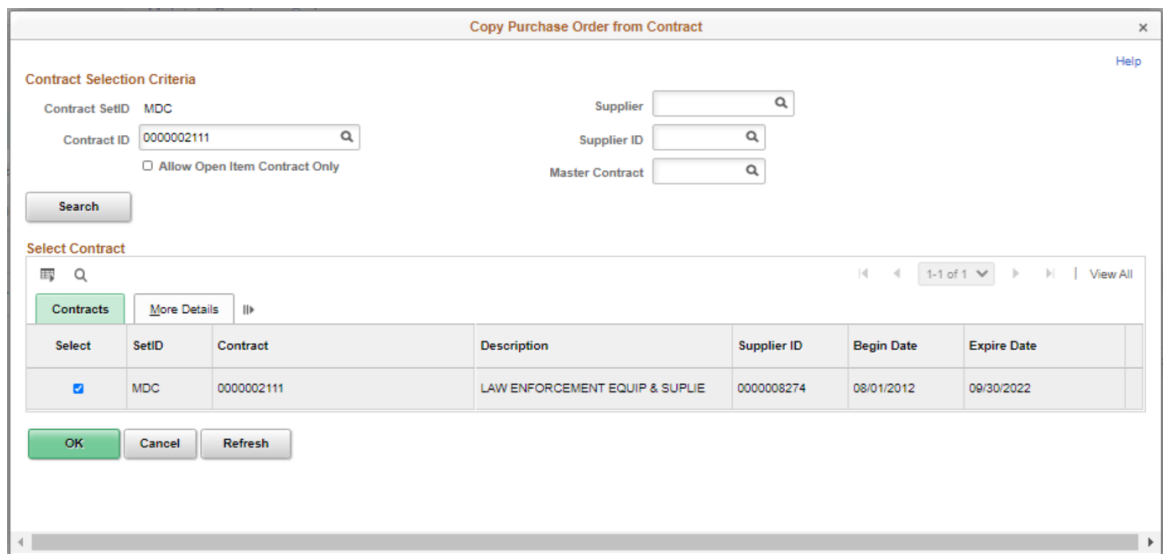
Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

The Copy From functionality allows a user to search for existing transactions through several criteria including **PO ID**, **Supplier ID**, and **Buyer ID**. User would enter any of the known data points from the transaction user wish to copy and select **Search**. The system will then return the transaction(s) that matches the search criteria in a results grid and user can select the specific transaction to copy from.

Note: It is possible to have no transactions that match the search criteria. If this is the case, you will need to update the search criteria.

Additionally, the Copy From functionality allows a user to search for existing Supplier Contracts by **Contract ID** or **Supplier ID**. User would enter any of the known data points from the transaction to copy and select search. The system will then return the transaction(s) that matches the search criteria in a results grid and user can select the specific Contract details to create a Purchase Order from.




Two key features when entering a Purchase Order in the INFORMS Purchasing module are the **Allocation** and **Retainage**. Allocation is the total spending amount for each County Department on a given Supplier Contract that cannot be exceeded. As part of the integration with the INFORMS Supplier Contracts module, a Purchase Order that is copied from a Contract will have a hyperlink that displays the current Contract Allocation amounts.

The Purchase Order page also includes the County's requirement for tracking Retainage data. As part of the integration with the INFORMS Supplier Contracts module, a Purchase Order that is copied from a Contract with existing Retainage will have the Contract Retainage copied to the Purchase Order Line Details.

Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders



Expand All Collapse All

- Item Information
- Attributes
- RFQ
- Contract
- Receiving
- Custom Fields

Custom Character 1 ☐

Custom Character 2 ☐

Custom Date

Retainage % 9

Retainage Amount 90.00

Custom Field 3

Custom Field 4

On the page, user will see the **PO ID** updated from **NEXT** to the appropriate numerical value in the sequence. From there, before submitting the PO for approval and the security permissions granted, user will have the ability to review the PO details either directly on the **Add/Update POs** page through the **Find an Existing Value** tab or the **Review PO Information** and **Buyer WorkCenter** navigations.

To access the Review PO Information page, user will utilize the navigator function via the following menu path:

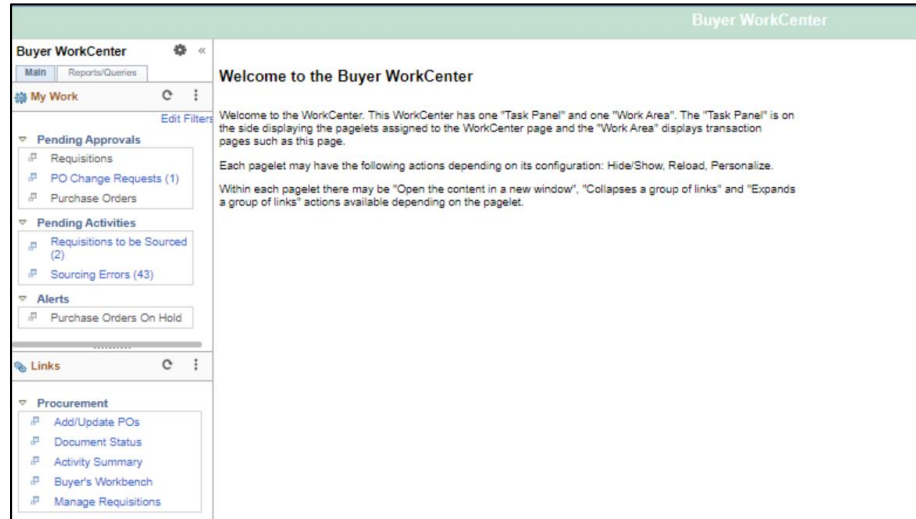
Finance / Supplier Chain (FSCM) > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

By searching for an existing PO ID for a given department business unit, user will be able to view the current Purchasing, Budgeting, Receiving and Matching statuses of the Purchase Order.

Lesson 1: Manage and Record Purchase Orders

Lecture 1: How to Enter and Maintain Purchase Orders

To access the Buyer WorkCenter page, user will navigate through the **Finance / Supply Chain (FSCM) > Supply Chain Operations > Buyer > Buyer WorkCenter**. The Buyer WorkCenter will display a Dashboard of a user's specific Purchasing related activities, including inquiry links to the created Purchase Orders.



The final step in entering and maintaining a Purchase Order is to submit for approval. This will route an approval request to a user's Approvers queue for their approval or denial. This is completed on the PO Header section of a Purchase Order.

Lesson 1: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Instructions Please refer to Activity 1 on the SCM 202 Training Activity and Data Sheet.

This activity will be performed individually; the user must complete it on a classroom workstation using the INFORMS training environment. The Instructor will tell how to log into INFORMS.

The user will perform the activity by following the SCM 202 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) will be available for questions.

Lesson 1: Training Activity 2

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Instructions Please refer to Activity 2 on the SCM 202 Training Activity and Data Sheet.

This activity will be performed individually; the user must complete it on a classroom workstation using the INFORMS training environment. The Instructor will tell how to log into INFORMS.

The user will perform the activity by following the SCM 202 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) will be available for questions.

Lesson 1: Training Activity 3

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Instructions Please refer to Activity 3 on the SCM 202 Training Activity and Data Sheet.

This activity will be performed individually; the user must complete it on a classroom workstation using the INFORMS training environment. The Instructor will tell how to log into INFORMS.

The user will perform the activity by following the SCM 202 Training Activity and Data Sheet and by using the training materials as reference tools.

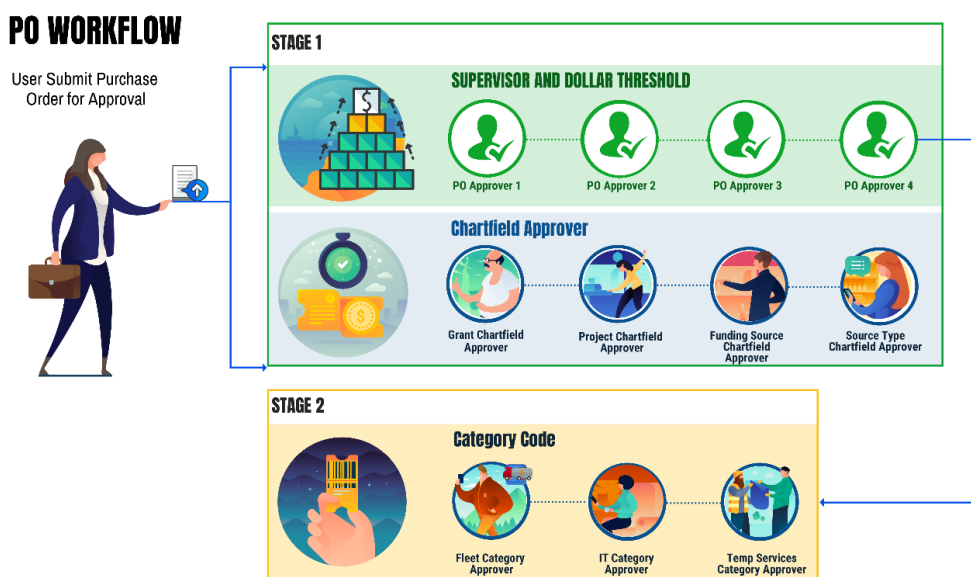
Instructor(s) are available for questions.

Lesson 1: Training Activity 3

Lecture 2: How to Approve Purchase Orders

To approve a purchase order, users will be granted security permissions based on Miami-Dade County's reporting hierarchy and defined dollar thresholds. The higher the dollar amount on the purchase, the more levels of approval it will require.

Additionally, purchase orders can be routed to **Commodity Code Approvers** and **ChartField Approvers** when the purchase order lines contain specific Categories or Accounting Distributions (i.e. Funding Source, Project, Grant, etc.).



To approve Purchase Orders, users can either access their specific **Approvals** tile from the INFORMS homepage or navigate to the Approve Purchase Orders page using the Navigator.

The Approvals tile on the INFORMS homepage will display all pending approvals currently assigned to the approver's queue. Users have the ability to filter the pending approval requests by Requester, Date Range, or by Priority.

Having identified the Purchase Order to approve, users will either approve or deny the Purchase Order and provide any necessary comments before the PO is either routed to the next approver or back to the buyer in case of denial.



Lesson 1: Manage and Record Purchase Orders

Lecture 2: How to Approve Purchase Orders

Pending Approvals			
View By	Type		
All	2		
Purchase Order	2		
All			
Purchase Order	10.00 USD	IT / 0000000081 / Cromartie, Mario ⚠ Medium Priority	Routed 03/25/2020 >
Purchase Order	3,000,000.00 USD	ID / 0000000031 / Lincheta, Ulises ⚠ Medium Priority	Routed 04/03/2020 >

The **Approve Purchase Orders** page enables a user to view and take action on Purchase Orders that require user's approval or view Purchase Orders that do not require user's approval.

Supply Chain Operations

Buyer

Approve Purchase Orders

Search

Enter search criteria and hit the Search button.

*Business Unit

From PO ID

PO Date From

Supplier ID

Buyer

*Approval Status

To PO ID

PO Date To

Supplier Name

PO Reference

Search Clear

Purchase Orders

To approve or deny one or more POs, select the appropriate action from the dropdown and choose Submit.
To view the PO details, click the PO ID link.

Expand All Collapse All

Action/Status	PO ID	PO Date	Buyer	PO Reference	PO Total	Supp ID	Supplier Name
Pending	0000000081	03/25/2020	T0140290		10.00 USD	0000000010	BANK OF AM-001

Mark All:

Use this page to search for and view Purchase Orders needing user's approval. Purchase Orders displayed are based on the user ID of the person entering this page. The scope and number of Purchase Orders that appear on the page can be limited. For example, search results can be filtered to a **specific buyer, date range, or approval status**.

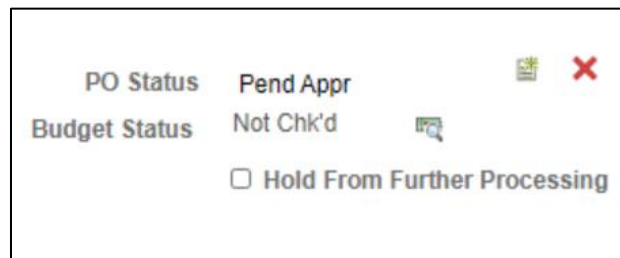
After displaying the Purchase Orders, approval tasks can be performed on a group of Purchase Orders or an individual Purchase Order. For more details on a particular Purchase Order, search the **PO ID** link to access the **Purchase Order Approval** page to view the details of one individual Purchase Order and perform approval tasks.

Once the Purchase Order has been routed through all approval levels it can then be processed through budget checking and dispatched to the vendor.

Lesson 1: Manage and Record Purchase Orders

Lecture 3: How to Process Purchase Orders

Budget checking is the process of determining how many dollars the user has committed in pre-encumbrances, encumbrances, and expenditures throughout the procurement lifecycle. Budget checking can be run in a scheduled batch processor or may be run manually to confirm that a valid budget and funds, if applicable, are available per the ChartFields defined on the Purchase Order distribution line(s). Budget check exceptions can also be resolved by correcting the ChartField distribution line(s) in error or contacting Finance to research and resolve budget issues. When creating online Purchase Orders, budget checks can be performed real-time by selecting the **Budget Check** button on the Maintain Purchase Order - Purchase Order page.

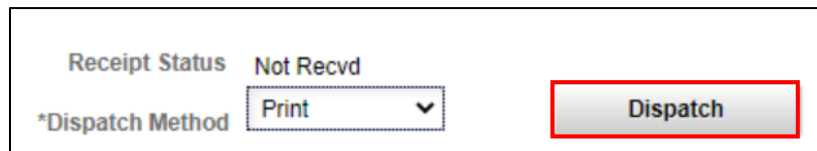


PO Status Pend Appr
Budget Status Not Chk'd

☐ Hold From Further Processing

Icons: A small green icon and a red 'X' icon are visible in the top right corner of the form area.

Additionally, the Purchase Order dispatch/process job will be able to be run in batch or online processes. The dispatch method will be defined as noted on the supplier's profile but may be changed as appropriate when running the process. To manually dispatch a Purchase Order online it first must be approved and have a budget status of **Valid**. Users will then select the PO to be dispatched via email or print by selecting the **Dispatch Method** and user will receive several messages confirming the Dispatch process. After this step, the Purchase Order will be dispatched to the supplier.

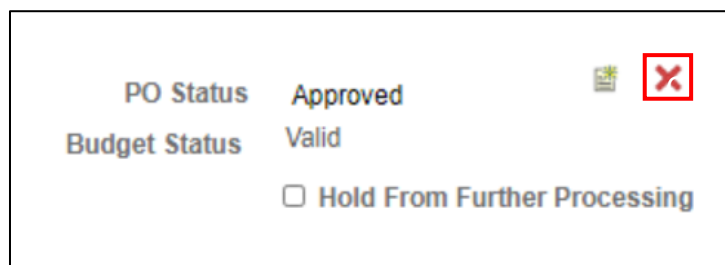


Receipt Status Not Recvd

*Dispatch Method Print ▼

Dispatch

Users can also choose to cancel a Purchase Order by selecting the red 'X' icon in the PO Header, stopping the PO from processing any further.



PO Status Approved

Budget Status Valid

☐ Hold From Further Processing

Icons: A small green icon and a red 'X' icon (highlighted with a red box) are visible in the top right corner of the form area.

Lesson 1: Training Activity 4

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Instructions Please refer to Activity 4 on the SCM 202 Training Activity and Data Sheet.

This activity will be performed individually; the user must complete it on a classroom workstation using the INFORMS training environment. The Instructor will tell how to log into INFORMS.

The user will perform the activity by following the SCM 202 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) will be available for questions.

Lesson 1: Manage and Record Purchase Orders

Lecture 4: How to Change Purchase Orders

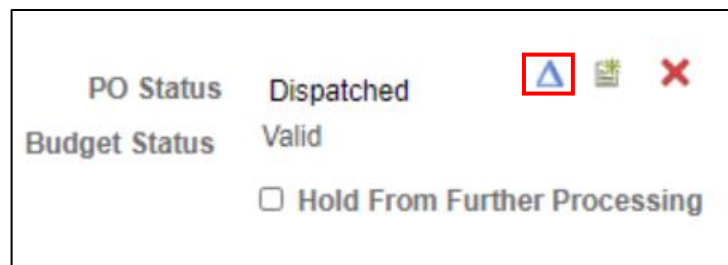
Users also have the ability to create an online **Change Order** against previously dispatched Purchase Orders. The system revises the Change Order tracking tables and a change sequence number is assigned. An example would be to update suppliers of changes to the initial order. User can then continue the process by running a budget check and re-dispatching the Purchase Order to the supplier.




To create a Change Order online, navigate to the Create/Update POs page and search for an existing PO that is currently in Dispatched status. Fields that are eligible for Change Order tracking according to the Purchase Order change template are not available for entry on a dispatched Purchase Order.

To make a header-level change, access the **Maintain Purchase Order - Purchase Order** page and select the **Change Order** button next to the **PO Status** field.

To make a line-level change, select the **Statuses** tab on the **Lines** grid of the **Maintain Purchase Order** page and select **Create Line Change** (the blue triangle).











To make a schedule-level change, select **Create Schedule Change** on the **Statuses** tab from the **Maintain Purchase Order - Schedules** page (the blue triangle).



PO Status Dispatched   

Budget Status Valid

☐ Hold From Further Processing

Lines ?									
<div> <div>Details</div> <div>Ship To/Due Date</div> <div>Statuses</div> <div>Item Information</div> <div>Attributes</div> <div>RFO</div> <div>Contract</div> <div>Receiving</div> <div> ></div> </div>									
Line	Item	Description	Status	Backorder Status					
1		Compressor: High Pressure, All Sizes and Models	Approved	Not Backordered					
2		Trailers, With Enclosed Refrigeration Unit	Approved	Not Backordered					

Lesson 1: Manage and Record Purchase Orders

Lecture 4: How to Change Purchase Orders

Maintain Purchase Order

Schedules

Unit PR Supplier AIR COMPRE-001 PO Status Dispatched
PO ID 0000000151 PO Date 07/01/2020







[Return to Main Page](#)

Lines

Line 1 Item Compressor: High Pressure, All PO Qty 1.0000 EA Merchandise Amt 500.00 USD

Schedules













Details Statuses Shipment Matching Receiving Freight RTV Maintenance W/O

Sched	Schedule Details	*Due Date	*Ship To	Status	Create Schedule Change	Cancel Schedule			
1		07/01/2020	PR00000001	Active					

Adding a line automatically creates a Change Order for the line and new schedules are added.

Schedules









Details Statuses Shipment Matching Receiving Freight RTV Maintenance W/O

Sched	Schedule Details	*Due Date	*Ship To	Status	Create Schedule Change	Cancel Schedule			
1		07/01/2020	PR00000001	Active					
2		07/13/2020	PR00000001	Active					

If quantity is changed on a Purchase Order line and only one schedule exists, the system automatically creates a Change Order for the schedule.

Schedules

Details Statuses Shipment Matching Receiving Freight RTV Maintenance W/O

Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges
1		07/01/2020	PR00000001		1.0000	500.00000	500.00	Active		
2		07/13/2020	PR00000001		2	500.00000	0.00	Active		

Users do not have to select **Create Line Change** to make changes to the Purchase Order line quantity. The line quantity serves as a work field on the Purchase Order, so changes to its value are not tracked as changes. However, the system creates a schedule-level Change Order.

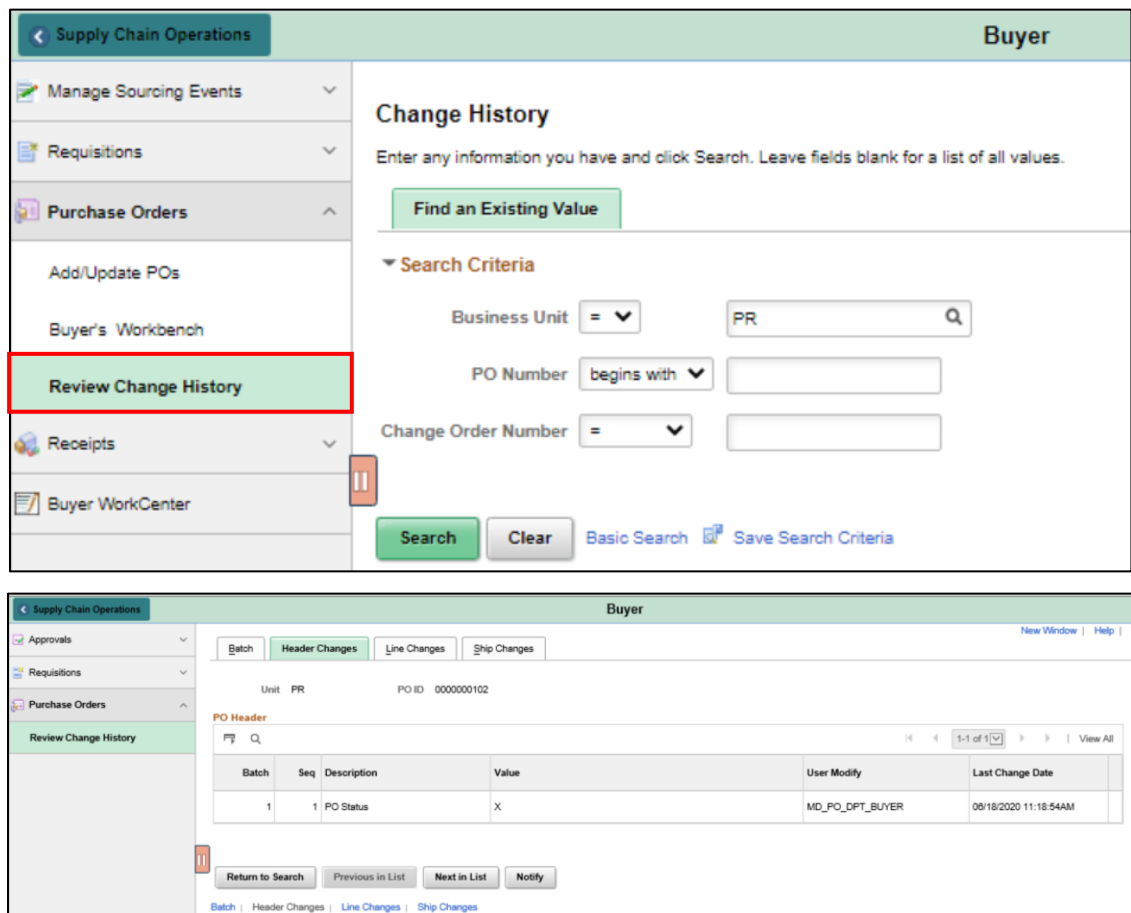
Lesson 1: Manage and Record Purchase Orders

Lecture 4: How to Change Purchase Orders

When creating Change Orders using the online Purchase Order pages, if user attempt to cancel a line or a schedule that has been received (even partially), the system adjusts the quantity of the line or schedule and creates a Change Order.

For example, if the line quantity is 5, and two lines or schedules have been received, the line quantity becomes the received quantity or 2 in this example. When the system transmits the Change Order to the vendor, the vendor sees that the quantity on the cancellation equals the quantity that he has already shipped, and he can cancel the remainder.

All Change Order information can be reviewed on the **Change History** page.



Change History

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

Find an Existing Value

Search Criteria

Business Unit =

PO Number begins with

Change Order Number =

[Basic Search](#)

Batch	Seq	Description	Value	User Modify	Last Change Date
1	1	PO Status	X	MD_PO_DPT_BUYER	09/18/2020 11:18:54AM

[Batch](#) | [Header Changes](#) | [Line Changes](#) | [Ship Changes](#)

After creating a Change Order online, dispatch it as a user would a regular Purchase Order.

Lesson 1: Training Activity 5

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Instructions Please refer to Activity 5 on the SCM 202 Training Activity and Data Sheet.

This activity will be performed individually; the user must complete it on a classroom workstation using the INFORMS training environment. The Instructor will advise how to log into INFORMS.

The user will perform the activity by following the SCM 202 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available for questions.

Lesson 1: Training Exercise

Debrief



1. Which of the following is the correct order of processing steps for a Purchase Order?
 - a. PO Data Entry > PO Approval > PO Budget Check > PO Dispatch > PO Change Order
 - b. PO Data Entry > PO Budget Check > PO Approval > PO Dispatch > PO Change Order
 - c. PO Data Entry > PO Budget Check > PO Dispatch > PO Change Order
 - d. PO Data Entry > PO Budget Check > PO Approval > PO Dispatch

2. Which of the following is not a component required to create a Purchase Order?
 - a. PO Distribution
 - b. PO Line
 - c. PO Header
 - d. PO Schedule
 - e. PO Punchout

Lesson 1: Lesson Summary

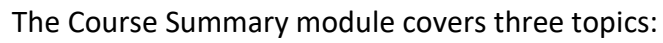
Lesson Summary



Now that you have completed the Execute Supplier Contract Document lesson, you should be able to:

- Enter and Maintain Purchase Orders
- Approve Purchase Orders
- Process Change Orders

Course Summary



- Course Content Summary
- Additional Training and Job Aids
- Course Evaluation

Module 3: Course Summary

Objectives Achieved



Congratulations! You have completed the Manage and Record Purchase Orders course. You now should be able to:

- Understand the End-to-End Process for Managing and Recording Purchase Orders
- Enter and Maintain Purchase Orders
- Approve Purchase Orders
- Process Purchase Orders
- Change Purchase Orders

Module 3: Course Summary

Additional Training and Job Aids

Users may be eligible to take the following training courses based on their INFORMS roles:

- SCM 203 – Record Receipt of Goods and Services

Users also have the following resources available:

User Productivity Kits

- Create PO from Req
- Create PO through PO auto-sourcing
- Create PO from Contract
- Create a PO Online with Item ID
- Approve a Purchase Order
- Budget Check and Dispatch a Purchase Order
- Create a Change Order

Job Aids

- N/A

For additional information, be sure to visit:

- Miamiidade.gov/informs

Module 3: Course Summary

Key Terms The following key terms are used in this course:



Term	Definition
Budget Checking	The process used to ensure that the expense transactions meet the requirements of the Appropriation Ledger based on Fund, Department and Account roll up as well as does not exceed the available budget amount.
Buyer	A user that manages purchase orders and relationships with suppliers. All users with the Department Buyer role will have defaults established to streamline PO data entry as it defines the default information that appears on a PO for a Buyer.
Buyer's WorkCenter	Use the Buyer's WorkCenter to manage Purchase Orders. Through the Buyer's WorkCenter page, the user can analyze, dispatch, cancel, close, and print preview Purchase Orders.
Dispatch	The process that sends the purchase order to the supplier. The two most common dispatch options are: Email Print
Matching	An automated process of comparing values found in different business documents: Voucher, Purchase Order, Receiver, if applicable, and inspection (if applicable) prior to approving a Voucher for payment. This process provides assurance that the products listed on a supplier invoice were requested and received at the appropriate price and in the appropriate quantity.
PO Change Order	A change to a quantity or price to an already dispatched Purchase Order or in other words, changes to a Purchase Order that was already dispatched to a Supplier.
Supplier	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.