



Miami-Dade County

Create a PO with an Asset Job Aid

Version 1.0

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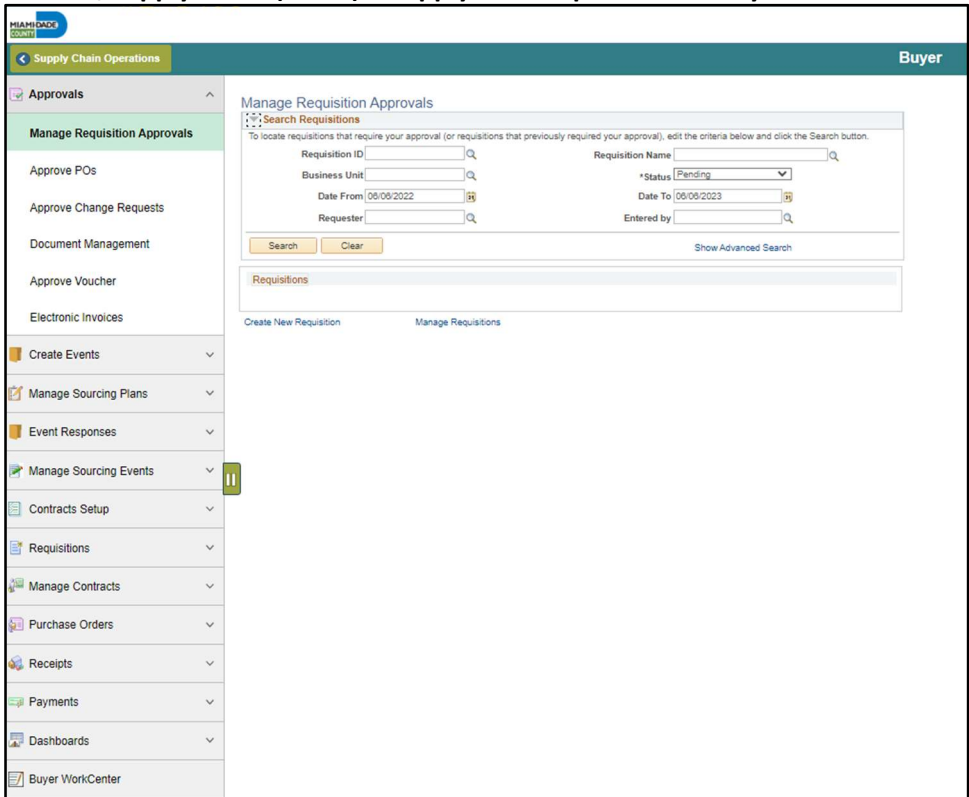
PURPOSE..... 2

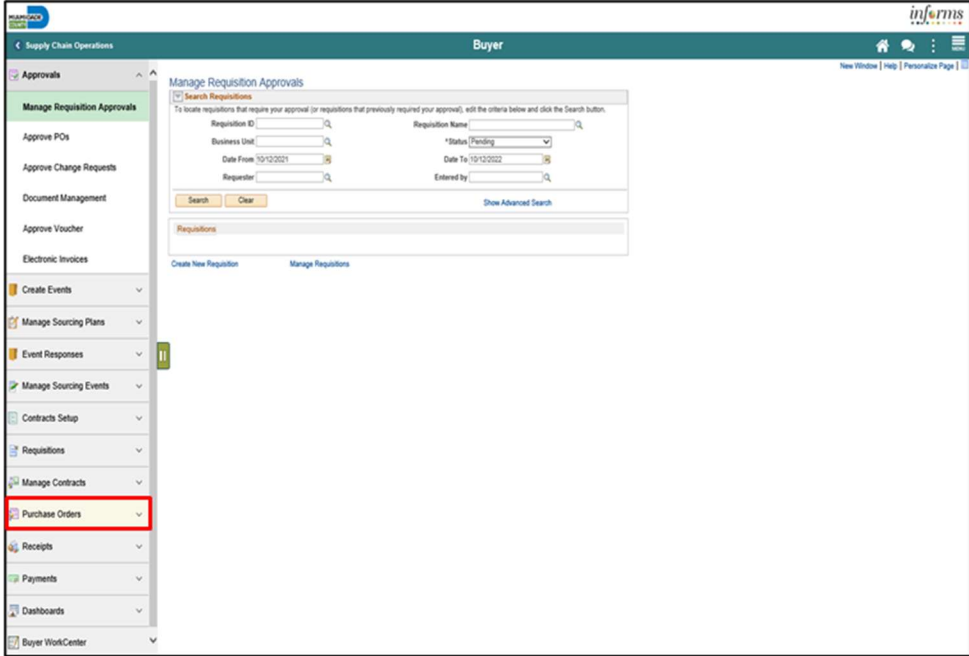
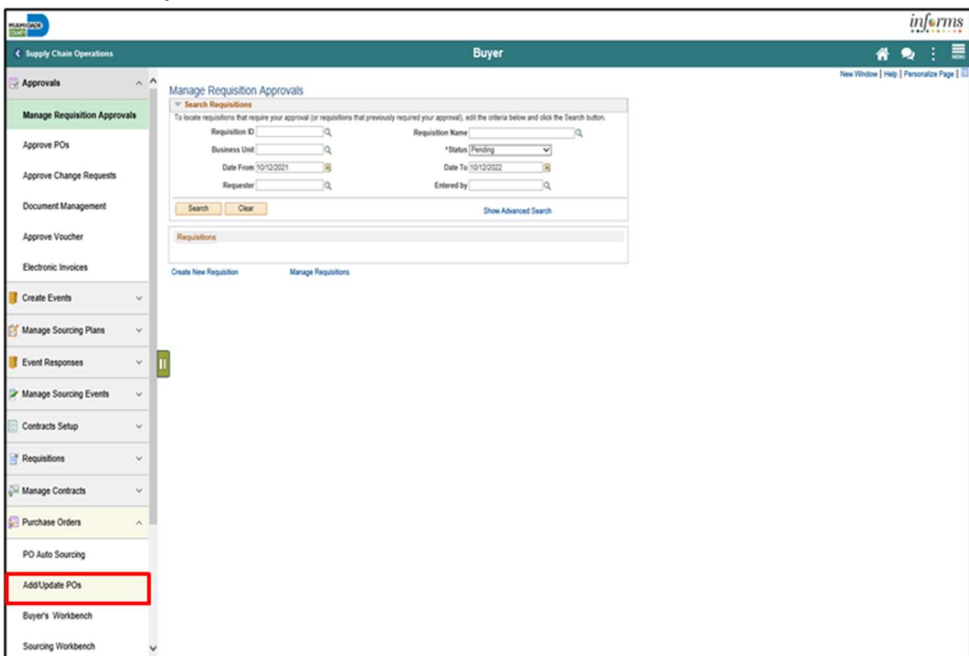
CREATE A PO WITH AN ASSET 3

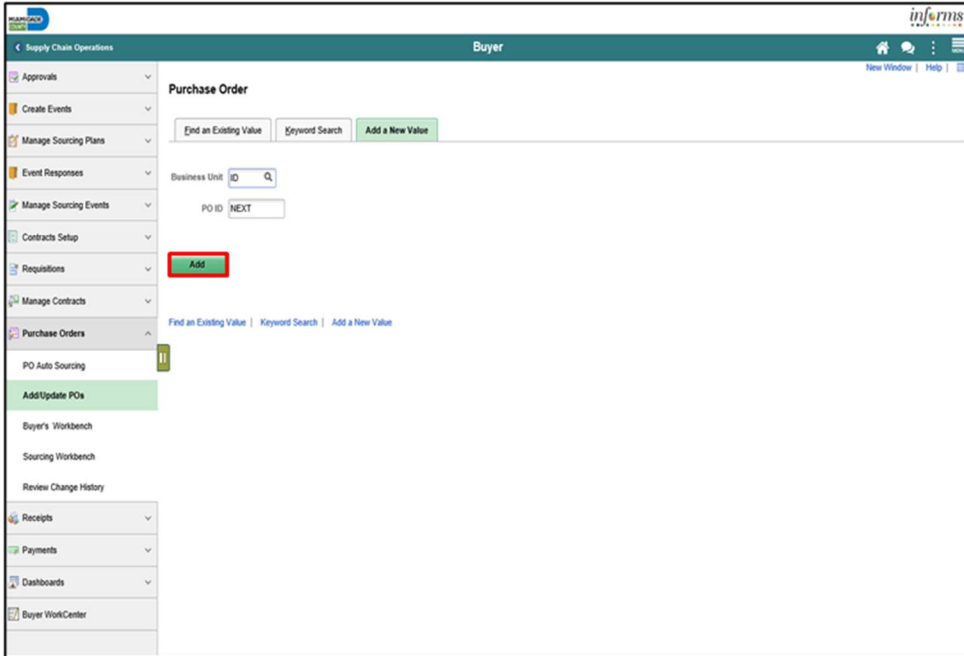
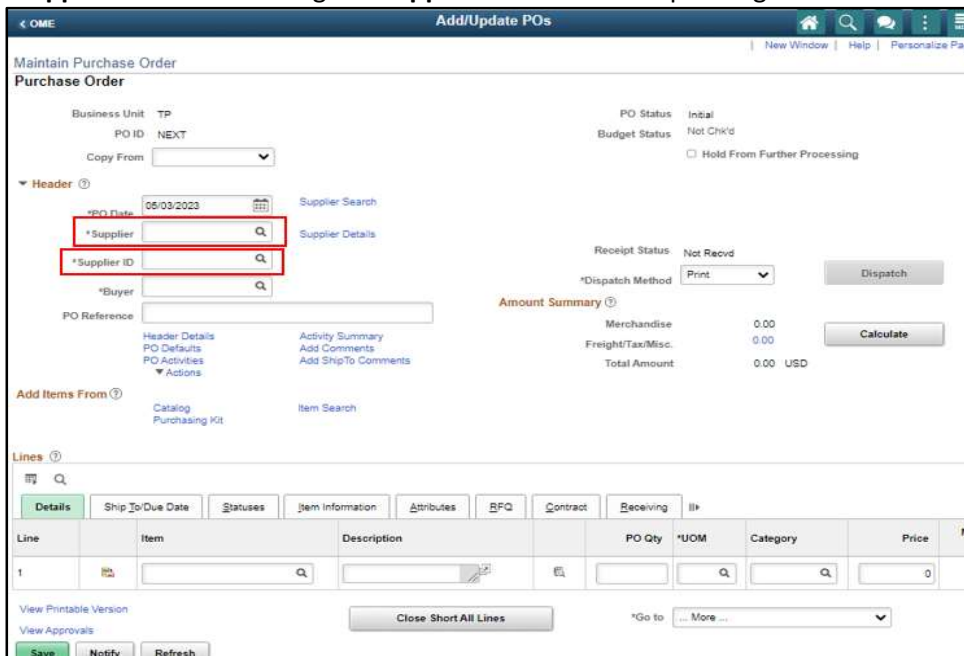
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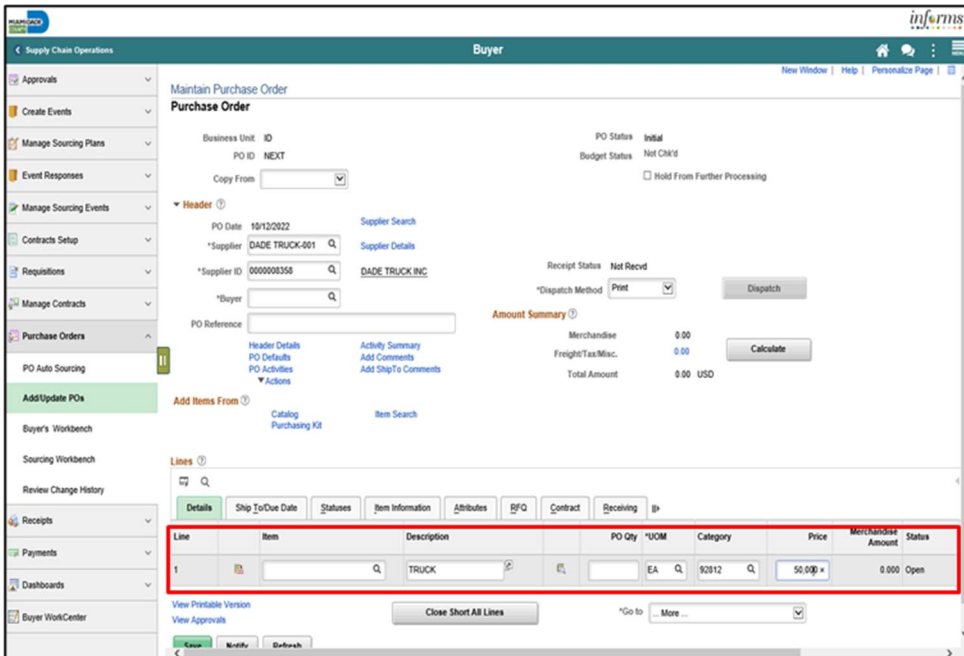
This document explains the key activities involved in creating a PO with an asset. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

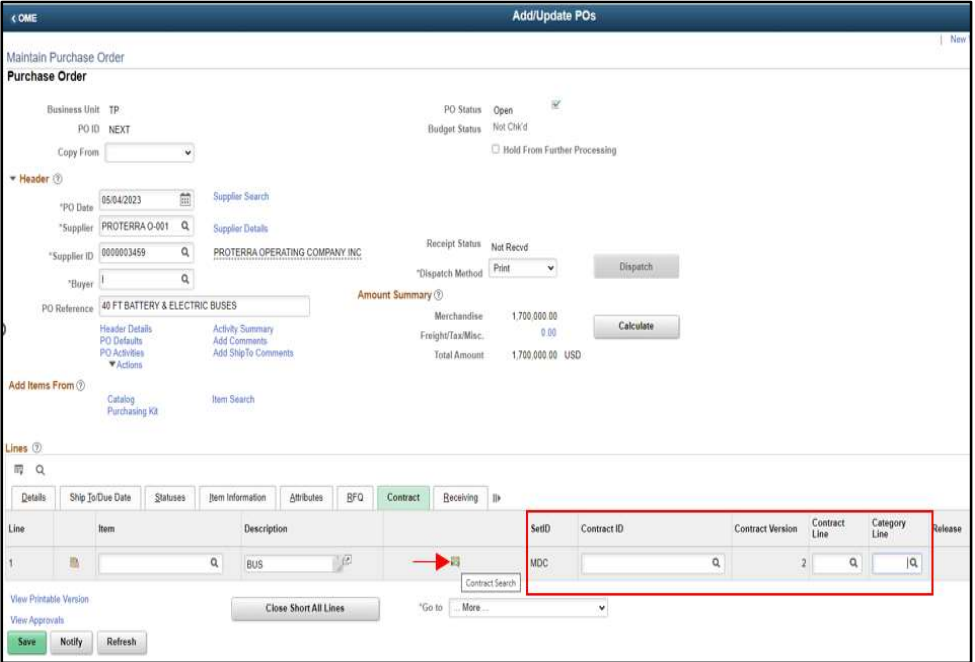
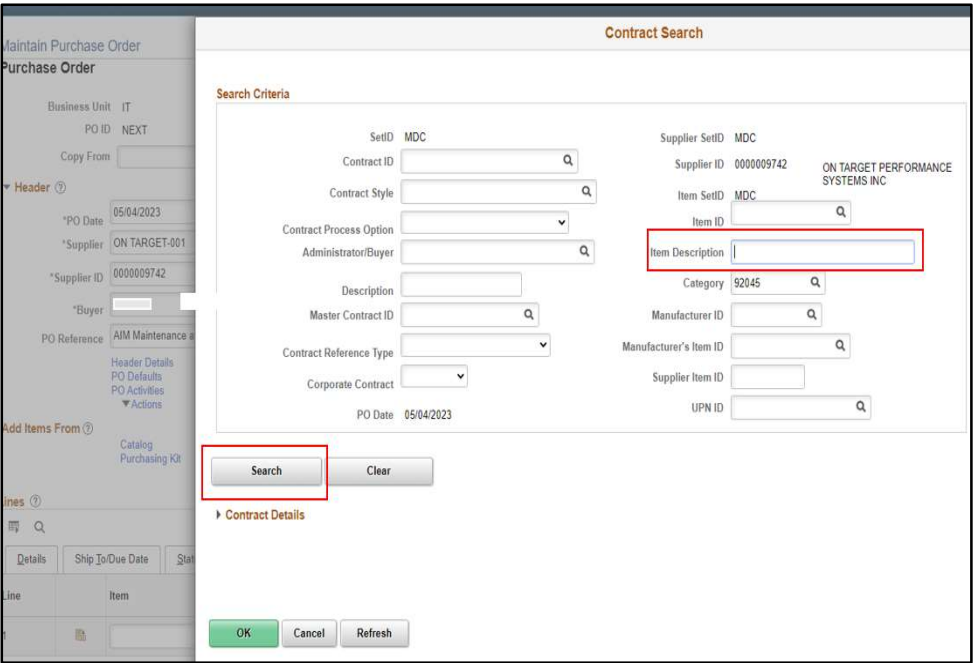
CREATE A PO WITH AN ASSET

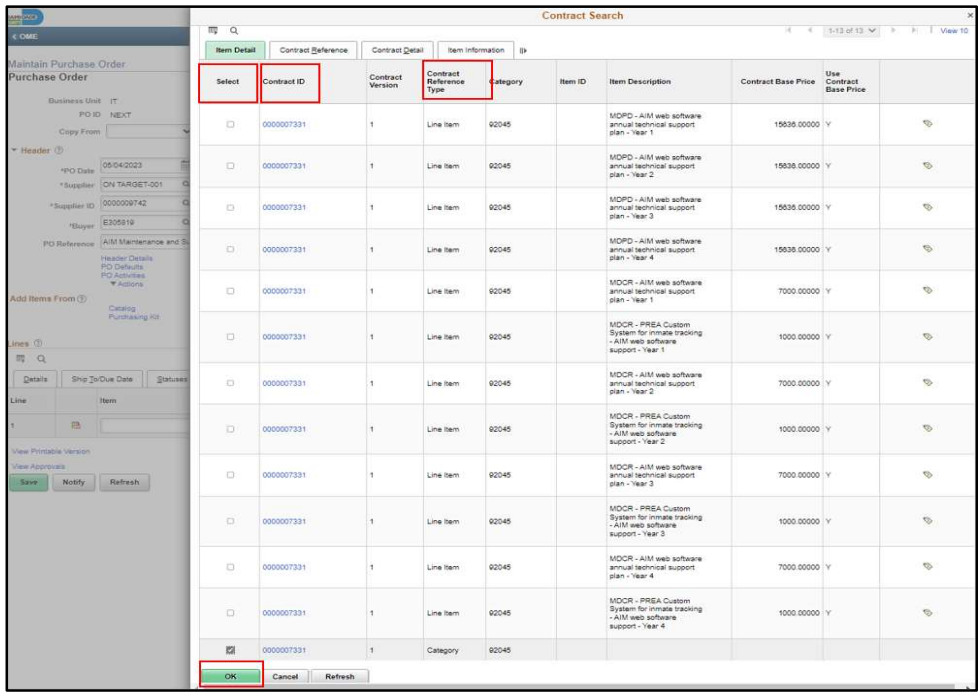
Step	Action
1.	Login to INFORMS .
2.	<p>Navigate to Buyer Finance/Supply Chain (FSCM) > Supply Chain Operations > Buyer</p>  <p>The screenshot shows the INFORMS Buyer interface. On the left is a navigation menu with the following items: Approvals, Manage Requisition Approvals, Approve POs, Approve Change Requests, Document Management, Approve Voucher, Electronic Invoices, Create Events, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, Receipts, Payments, Dashboards, and Buyer WorkCenter. The main content area is titled 'Manage Requisition Approvals' and includes a search bar, filters for Requisition ID, Business Unit, Date From, Date To, Requisition Name, Status, and Entered by, and buttons for Search, Clear, and Show Advanced Search. Below the search area is a table for Requisitions and links for Create New Requisition and Manage Requisitions.</p>

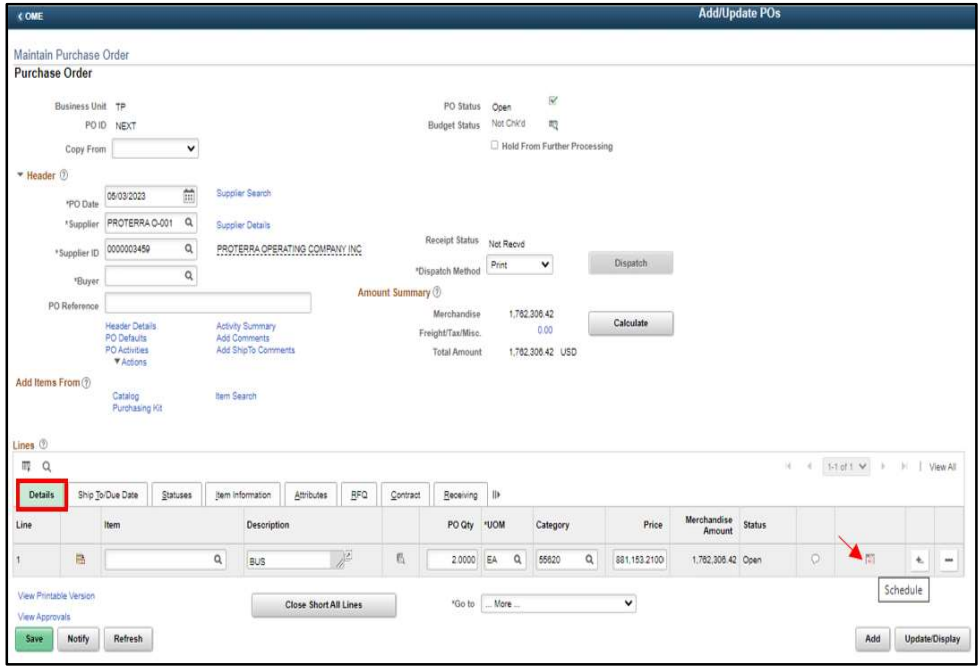
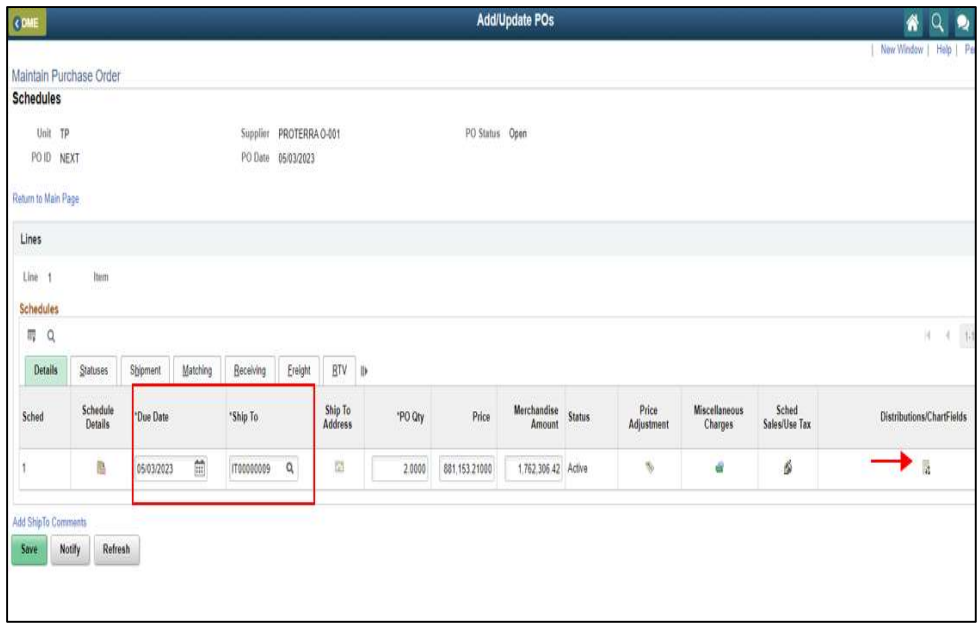
Step	Action
3.	<p>Select Purchase Orders.</p>  <p>The screenshot shows the InformaPO Buyer interface. On the left sidebar, under the 'Approvals' section, the 'Purchase Orders' menu item is highlighted with a red box. The main content area displays the 'Manage Requestion Approvals' page with search filters and a list of requestions.</p>
4.	<p>Select Add/Update POs.</p>  <p>The screenshot shows the InformaPO Buyer interface. On the left sidebar, under the 'Approvals' section, the 'Add/Update POs' menu item is highlighted with a red box. The main content area displays the 'Manage Requestion Approvals' page with search filters and a list of requestions.</p>

Step	Action
5.	<p>Select the Add button.</p> 
6.	<p>Input or search for the supplier in the system by entering the supplier's name in the "Supplier" field or entering the Supplier ID in the corresponding field.</p> 

Step	Action
7.	<p>Input the applicable line information in the details tab.</p> <ul style="list-style-type: none"> • Description • PO Qty • UOM • Category* • Price <p>* When creating a General Purchase Order (PO), it is important to input the category that corresponds to the contract.</p> <p>Note: Do not input any information in the Item Field</p> 

Step	Action
8.	<p>If a <i>General Purchase Order (PO)</i>, select the Contract Tab. Clear all the information from the Contract ID, Contract and Category Lines that may have been defaulted by the system, and select the Contract ID Icon.</p> 
9.	<p>Clear all the information from the Item Description field and select the Search button.</p> 

Step	Action
10.	<p>The system will list all the possible contract matches based on BU, supplier and category. Make sure the correct Child Contract (Contract ID), and Contract Reference Type (Line or Category) are selected. Once selected, Select the OK button.</p> <p>Note: In the "Contract ID" column, you will find a hyperlink for each contract. Selecting on it will open the contract page, where you can review and confirm other contract information such as GRI.</p> 

Step	Action
11.	<p>Select the Details tab and select on the Schedule Icon.</p> 
12.	<p>Select the Due Date, Ship To location, and select on the Distributions/ChartFields Icon.</p> 

13.

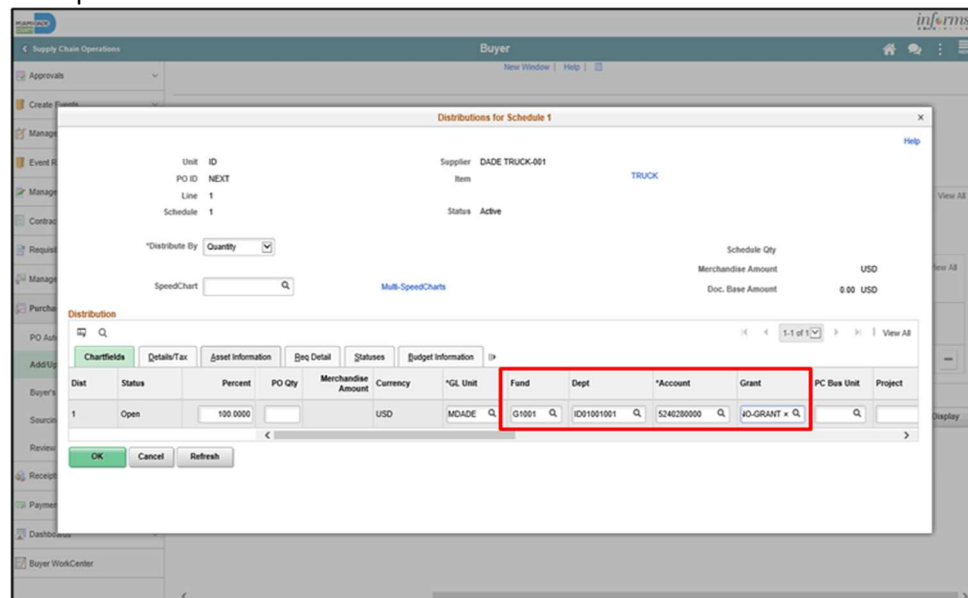
Input the ChartField details.

- **Fund**
- **Dept**
- **Account**
- **Grant***
- **PC Bus Unit, Project, and Activity, if applicable.**

*Grant is a required field. Buyer needs to input 'NO-GRANT' or input the correct Grant number.

Note: In case you require more than one funding source, you can add additional ChartFields Distribution Lines.

Example 1 – One ChartField Distribution Line



Distributions for Schedule 1

Unit ID: NEXT
PO ID: NEXT
Line: 1
Schedule: 1

Supplier: DADE TRUCK-001
Item: TRUCK
Status: Active

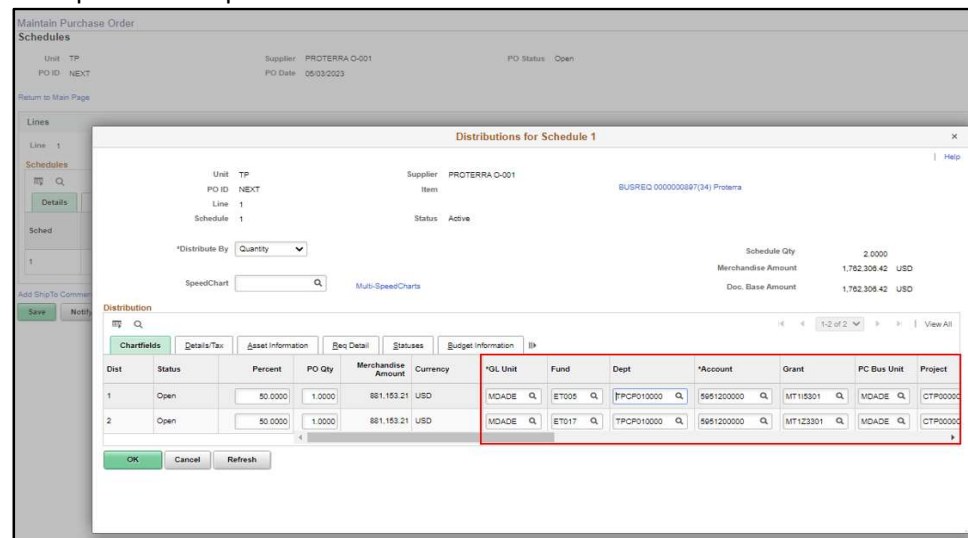
*Distribute By: Quantity
SpeedChart:

Merchandise Amount: 100.0000 USD
Doc. Base Amount: 0.00 USD

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Fund	Dept	*Account	Grant	PC Bus Unit	Project
1	Open	100.0000	1	100.0000	USD	MOADE	G1001	ID01001001	5240200000	NO-GRANT		

OK Cancel Refresh

Example 2 – Multiple ChartFields Distribution lines



Distributions for Schedule 1

Unit: TP
PO ID: NEXT
Line: 1
Schedule: 1

Supplier: PROTERRA O-001
Item: BUSREQ 0000000897(34) Proteins
Status: Open

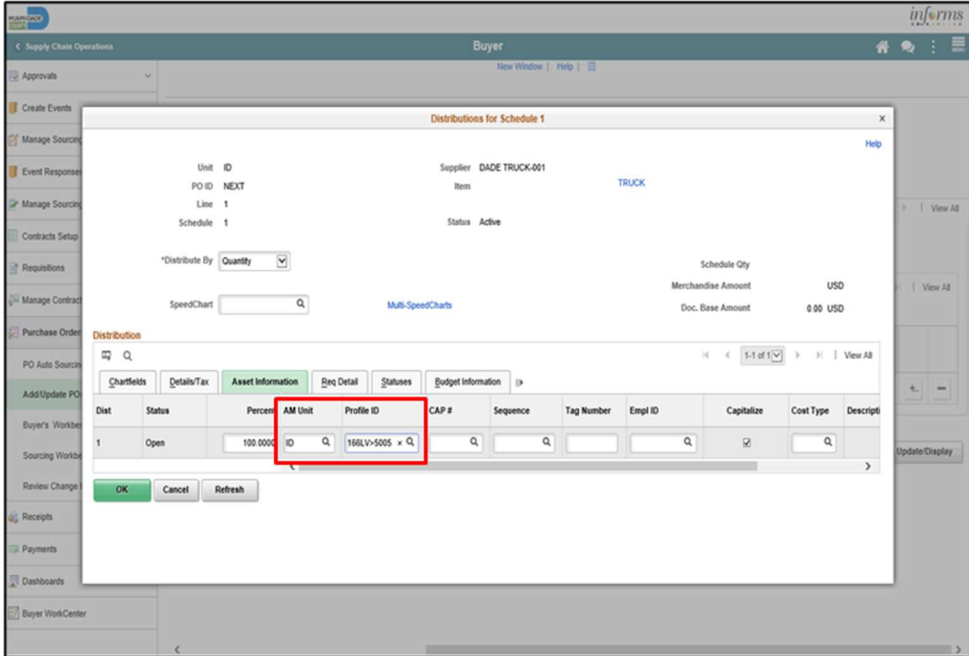
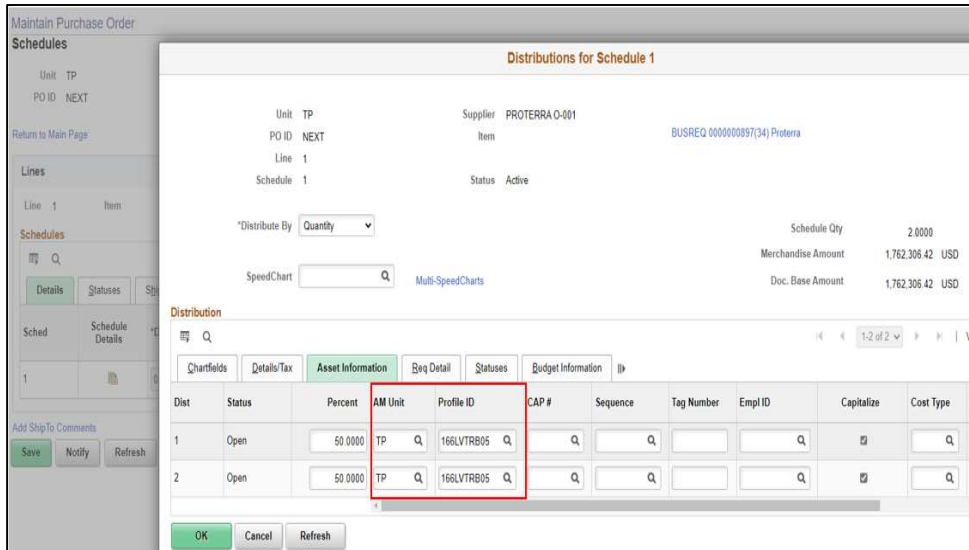
*Distribute By: Quantity
SpeedChart:

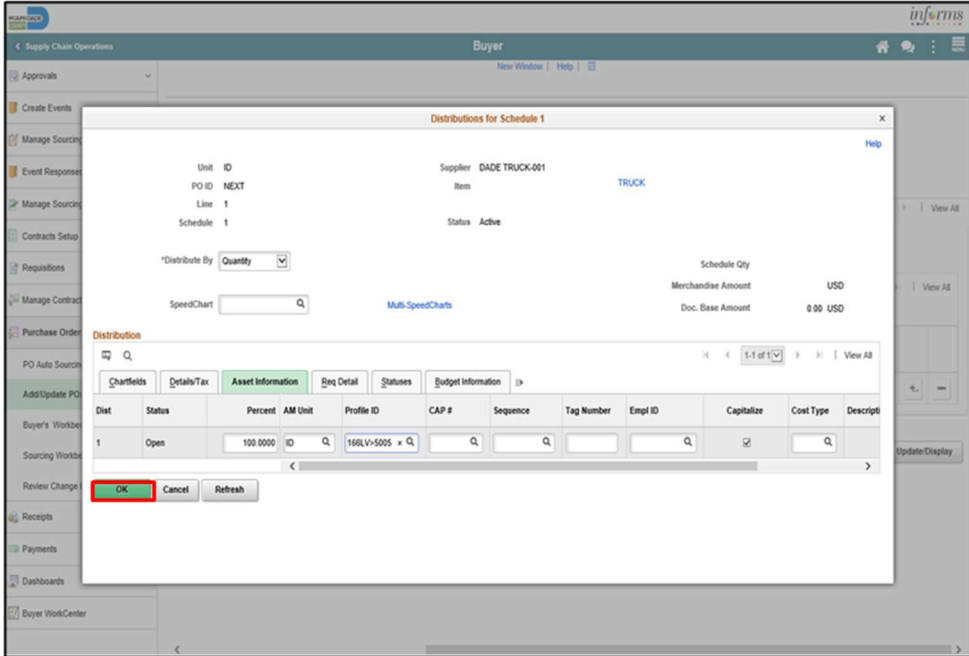
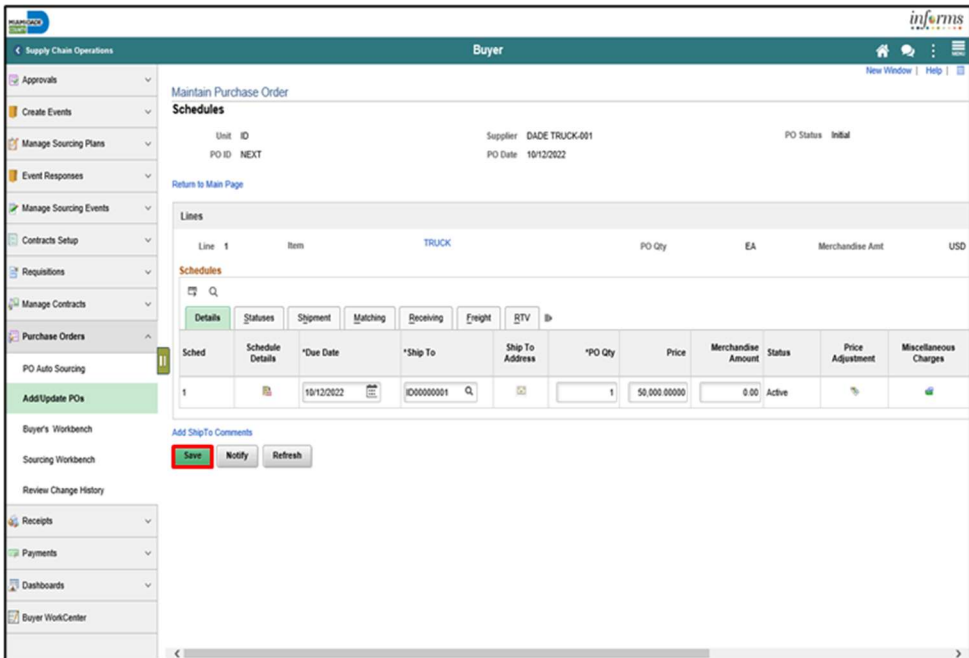
Merchandise Amount: 1,762,306.42 USD
Doc. Base Amount: 1,762,306.42 USD

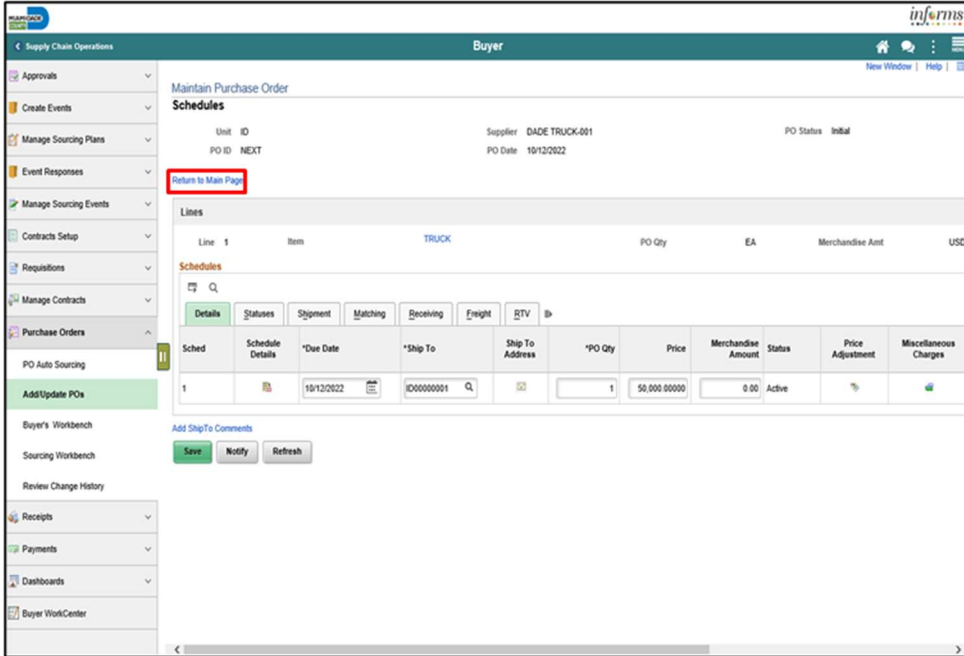
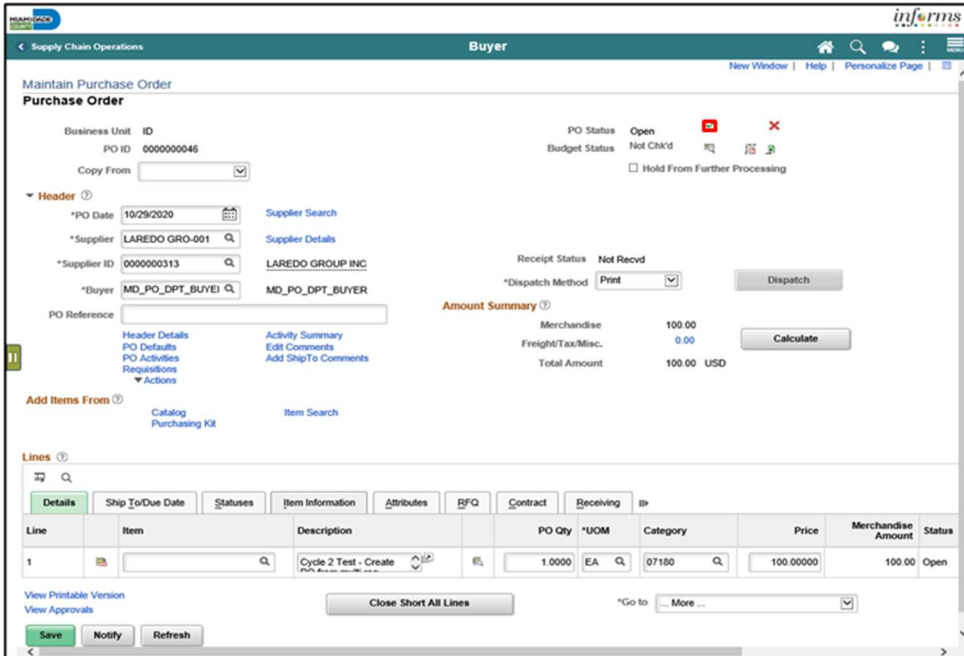
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	Fund	Dept	*Account	Grant	PC Bus Unit	Project
1	Open	50.0000	1.0000	881.153.21	USD	MOADE	ET005	PPOCP010000	5951200000	MT115301	MOADE	CTP00000
2	Open	50.0000	1.0000	881.153.21	USD	MOADE	ET017	TPCOP010000	5951200000	MT123301	MOADE	CTP00000

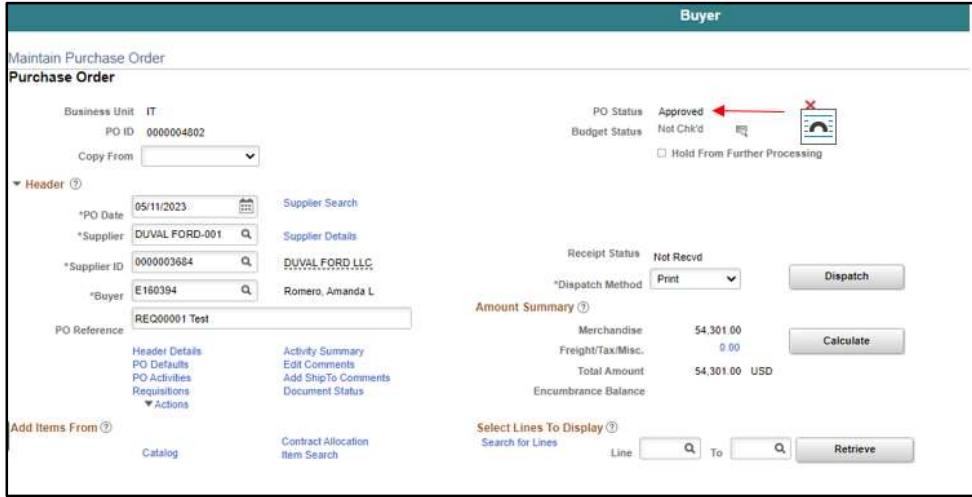
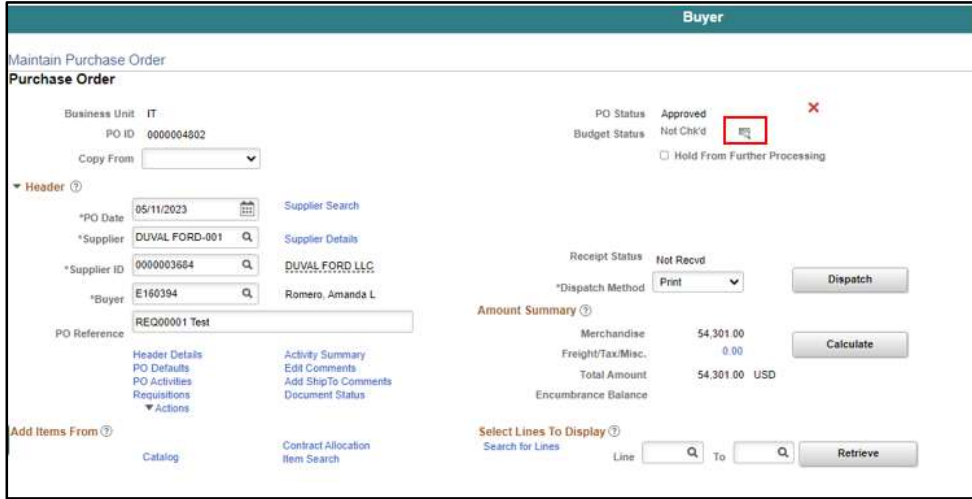
OK Cancel Refresh

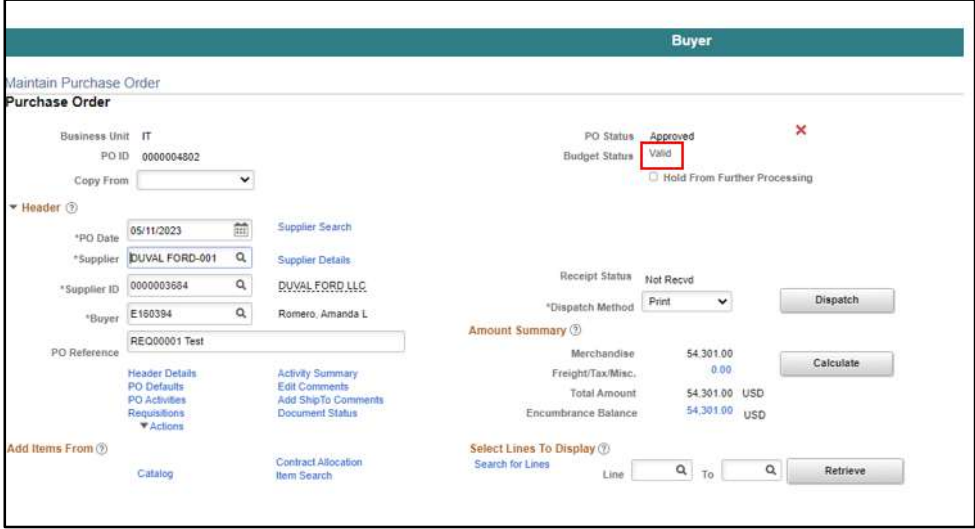
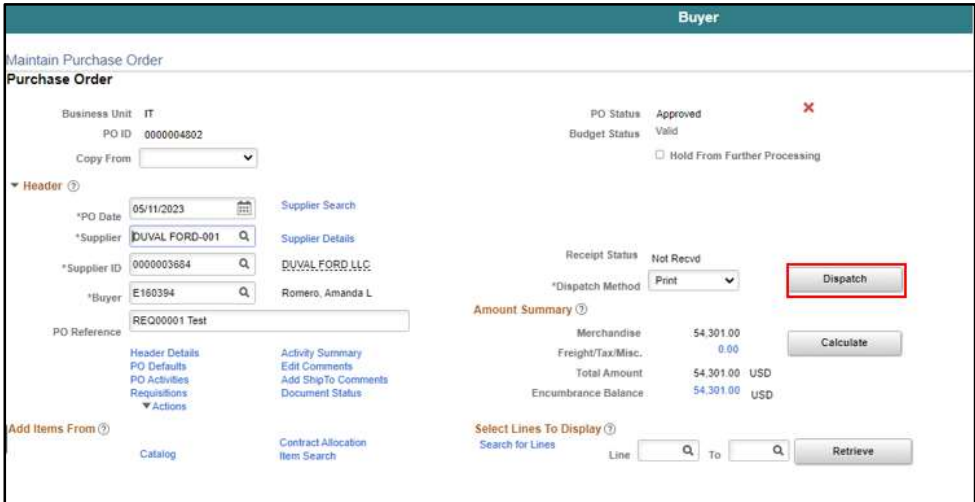
Step	Action
14.	Select the Asset Information tab.

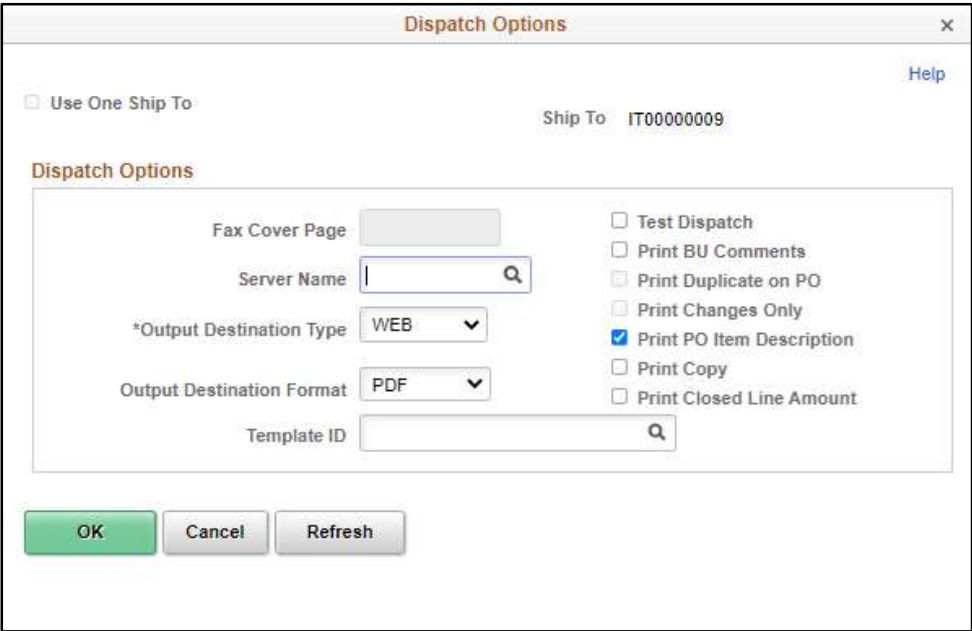
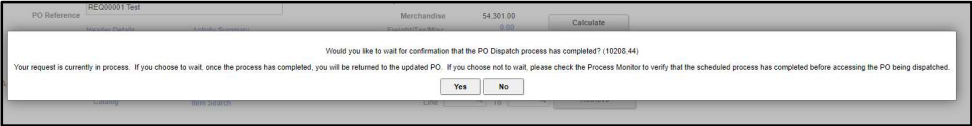
Step	Action
15.	<p>Input the Asset details.</p> <ul style="list-style-type: none"> • AM Unit • Profile ID <p>Note: The above information should be obtained from the Capital Inventory Officer or the Departmental Accounting Staff before submitting the PO for approval.</p> <p>When a PO line has multiple ChartFields Distribution lines, ensure that the Asset Details are entered in all the ChartFields Distribution Lines for that PO line.</p> <p>Example 1 – One ChartField Distribution Line</p>  <p>Example 2 – Multiple ChartFields Distribution lines</p> 






Step	Action
16.	<p>Select the OK button.</p> 
17.	<p>Select the Save button.</p> 

Step	Action
18.	<p>Select the Return to Main Page hyperlink.</p> 
19.	<p>Select the Submit for Approval button.</p> 

Step	Action																
20.	<p>After the PO has been approved. The PO status changes to “Approved”. Click the magnifying glass icon next to Budget Status to submit the PO for budget checking process.</p> <div data-bbox="365 424 1331 917">  <p>Buyer</p> <p>Maintain Purchase Order</p> <p>Purchase Order</p> <p>Business Unit IT PO ID 0000004002 Copy From <input type="text"/></p> <p>PO Status Approved Budget Status Not Chk'd <input type="checkbox"/> Hold From Further Processing</p> <p>▼ Header ⓘ</p> <p>*PO Date 05/11/2023 *Supplier DUVAL FORD-001 *Supplier ID 0000003684 *Buyer E160394 PO Reference REQ00001 Test</p> <p>Supplier Search Supplier Details DUVAL FORD LLC Romero, Amanda L</p> <p>Receipt Status Not Recvd *Dispatch Method Print Dispatch</p> <p>Amount Summary ⓘ</p> <table> <tr> <td>Merchandise</td> <td>54,301.00</td> </tr> <tr> <td>Freight/Tax/Misc.</td> <td>0.00</td> </tr> <tr> <td>Total Amount</td> <td>54,301.00 USD</td> </tr> <tr> <td>Encumbrance Balance</td> <td></td> </tr> </table> <p>Calculate</p> <p>Select Lines To Display ⓘ</p> <p>Search for Lines Line <input type="text"/> To <input type="text"/> Retrieve</p> <p>Header Details PO Defaults PO Activities Requisitions ▼ Actions</p> <p>Activity Summary Edit Comments Add ShipTo Comments Document Status</p> <p>Add Items From ⓘ</p> <p>Catalog Contract Allocation Item Search</p> </div> <div data-bbox="365 926 1331 1421">  <p>Buyer</p> <p>Maintain Purchase Order</p> <p>Purchase Order</p> <p>Business Unit IT PO ID 0000004002 Copy From <input type="text"/></p> <p>PO Status Approved Budget Status Not Chk'd <input type="checkbox"/> Hold From Further Processing</p> <p>▼ Header ⓘ</p> <p>*PO Date 05/11/2023 *Supplier DUVAL FORD-001 *Supplier ID 0000003684 *Buyer E160394 PO Reference REQ00001 Test</p> <p>Supplier Search Supplier Details DUVAL FORD LLC Romero, Amanda L</p> <p>Receipt Status Not Recvd *Dispatch Method Print Dispatch</p> <p>Amount Summary ⓘ</p> <table> <tr> <td>Merchandise</td> <td>54,301.00</td> </tr> <tr> <td>Freight/Tax/Misc.</td> <td>0.00</td> </tr> <tr> <td>Total Amount</td> <td>54,301.00 USD</td> </tr> <tr> <td>Encumbrance Balance</td> <td></td> </tr> </table> <p>Calculate</p> <p>Select Lines To Display ⓘ</p> <p>Search for Lines Line <input type="text"/> To <input type="text"/> Retrieve</p> <p>Header Details PO Defaults PO Activities Requisitions ▼ Actions</p> <p>Activity Summary Edit Comments Add ShipTo Comments Document Status</p> <p>Add Items From ⓘ</p> <p>Catalog Contract Allocation Item Search</p> </div>	Merchandise	54,301.00	Freight/Tax/Misc.	0.00	Total Amount	54,301.00 USD	Encumbrance Balance		Merchandise	54,301.00	Freight/Tax/Misc.	0.00	Total Amount	54,301.00 USD	Encumbrance Balance	
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Encumbrance Balance																	

Step	Action
21.	<p>After the PO has been submitted for Budget Checking the PO budget status should change to “Valid”</p> <p>Note: If there are any issues in the Budget Checking process the system will display either an error message or will place the PO in Budget status of Error. A new window will display with the budget error.</p> <p>Contact your BU (Business Unit) budget analyst and provide a screen shot of the budget error window displaying the budget error message.</p>  <p>The screenshot shows the 'Buyer' interface for 'Maintain Purchase Order'. The 'Purchase Order' header is visible with fields for Business Unit (IT), PO ID (000004802), and PO Status (Approved). The 'Budget Status' is highlighted as 'Valid'. The 'Amount Summary' section shows a Total Amount of \$4,301.00 USD. The 'Dispatch' button is visible in the bottom right corner.</p>
22.	<p>Click the “Dispatch” button.</p>  <p>The screenshot shows the 'Buyer' interface for 'Maintain Purchase Order'. The 'Purchase Order' header is visible with fields for Business Unit (IT), PO ID (000004802), and PO Status (Approved). The 'Budget Status' is highlighted as 'Valid'. The 'Amount Summary' section shows a Total Amount of \$4,301.00 USD. The 'Dispatch' button is highlighted in the bottom right corner.</p>

Step	Action
23.	<p>Click “OK”</p> 
24.	<p>Click “Yes”</p> 

Step	Action
25.	<p>Notice “PO Status” changed to “Dispatched”.</p> <div data-bbox="365 340 1323 995"> <p>Maintain Purchase Order</p> <p>Purchase Order</p> <p>Business Unit IT PO ID 0000004802</p> <p>Copy From <input type="text"/></p> <p>PO Status Dispatched  </p> <p>Budget Status Valid <input type="checkbox"/> Hold From Further Processing</p> <p>▼ Header </p> <p>*PO Date 05/11/2023  Supplier Search</p> <p>*Supplier DUVAL FORD-001 Supplier Details</p> <p>*Supplier ID 0000003604 DUVAL FORD LLC</p> <p>*Buyer E160394 Romero, Amanda L</p> <p>PO Reference REQ00001 Test</p> <p>Header Details Activity Summary</p> <p>PO Defaults Edit Comments</p> <p>PO Activities Add ShipTo Comments</p> <p>Requisitions Document Status</p> <p>▼ Actions</p> <p>Backorder Status Not Backordered Create BackOrder</p> <p>Receipt Status Not Recvd</p> <p>*Dispatch Method Print <input type="button" value="Dispatch"/></p> <p>Amount Summary </p> <p>Merchandise 54,301.00</p> <p>Freight/Tax/Misc. 0.00</p> <p>Total Amount 54,301.00 USD</p> <p>Encumbrance Balance 54,301.00 USD</p> <p><input type="button" value="Calculate"/></p> </div>