informs

Miami-Dade County

Create a PO with an Asset Job Aid

Version 1.0

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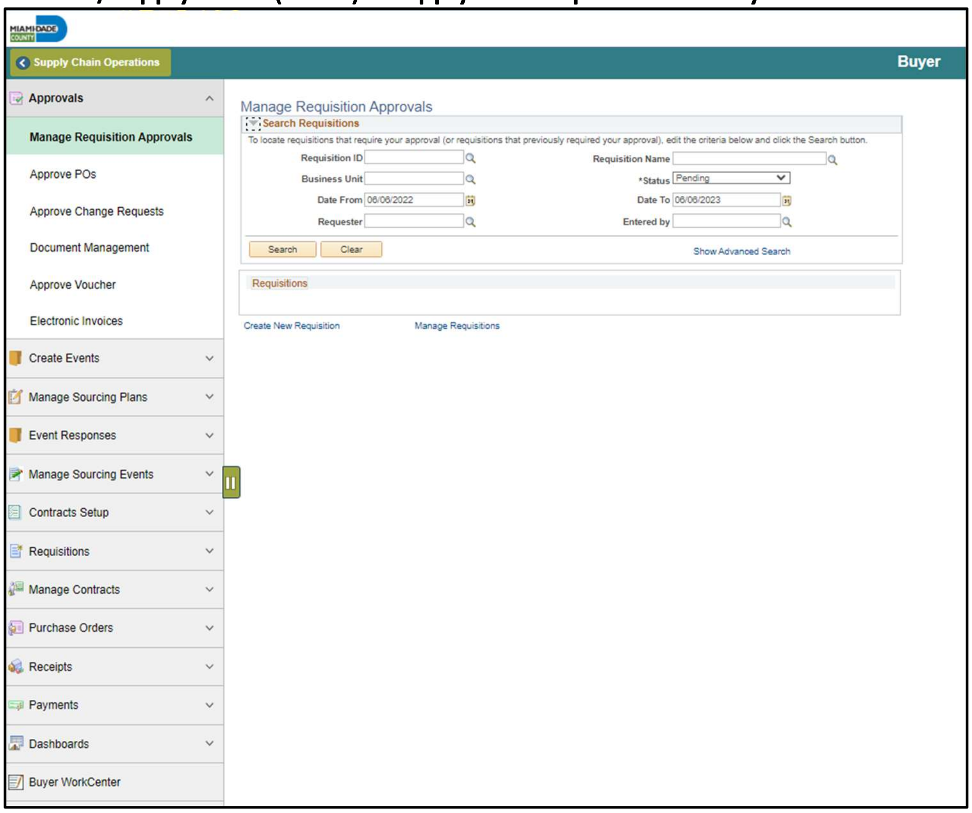
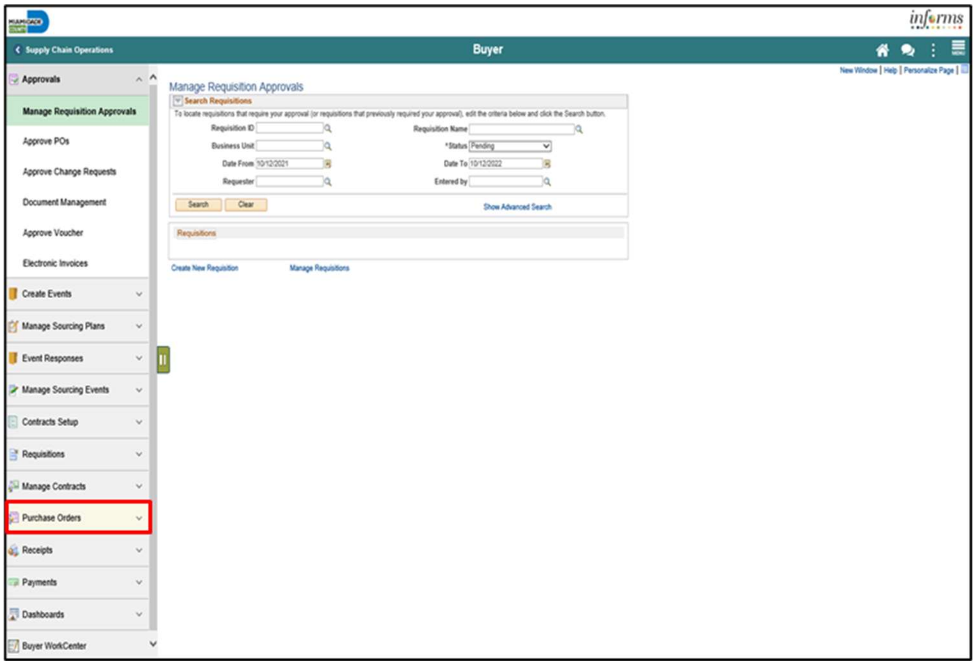
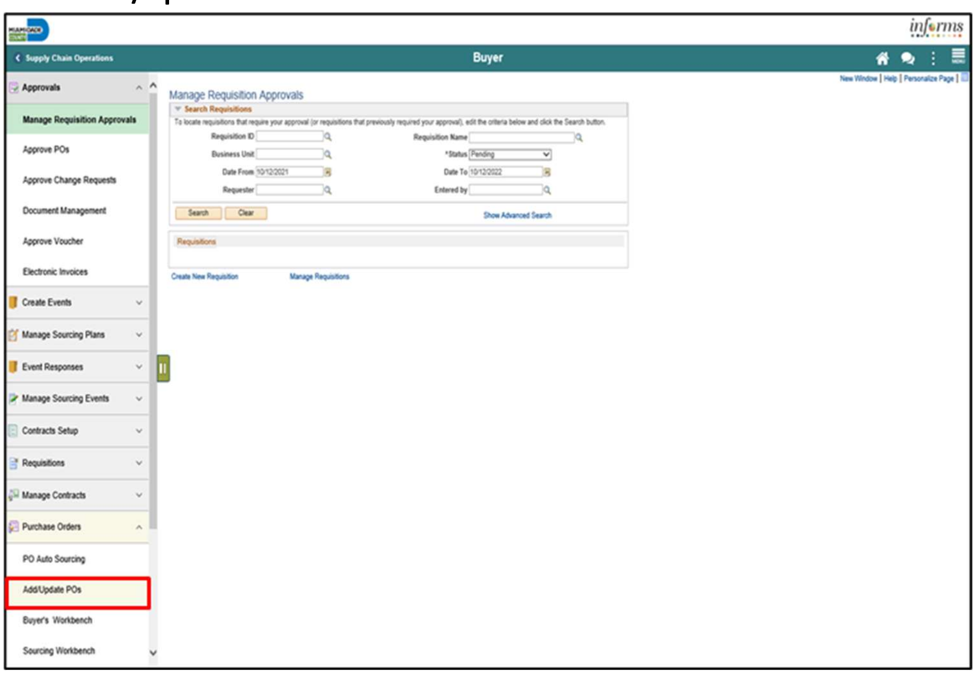
PURPOSE

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3.</td><td>Select Purchase Orders.


</td></tr>
<tr><td>4.</td><td>Select Add/Update POs.


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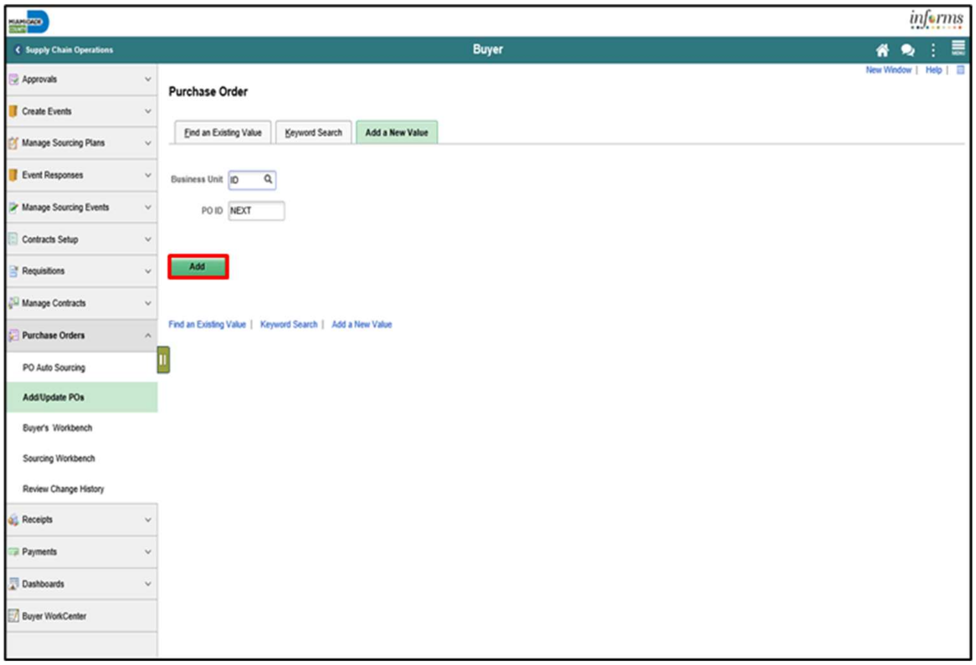
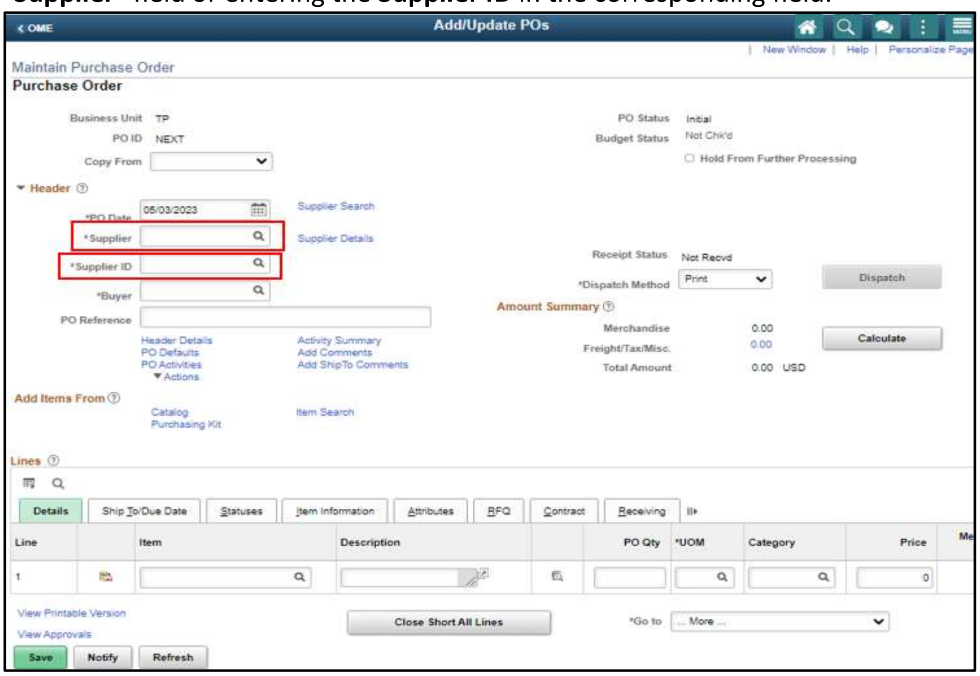
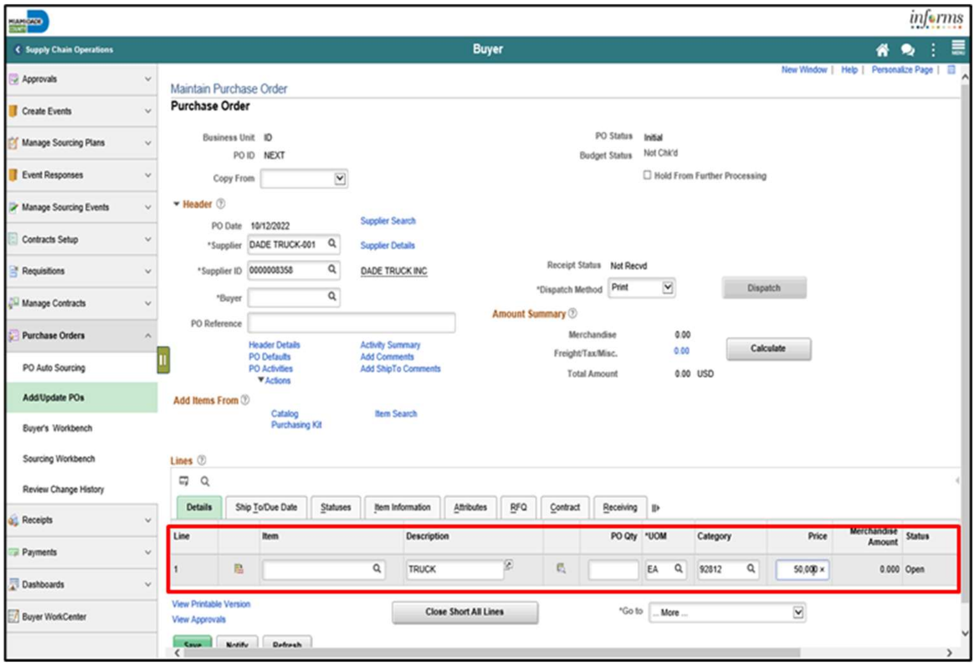
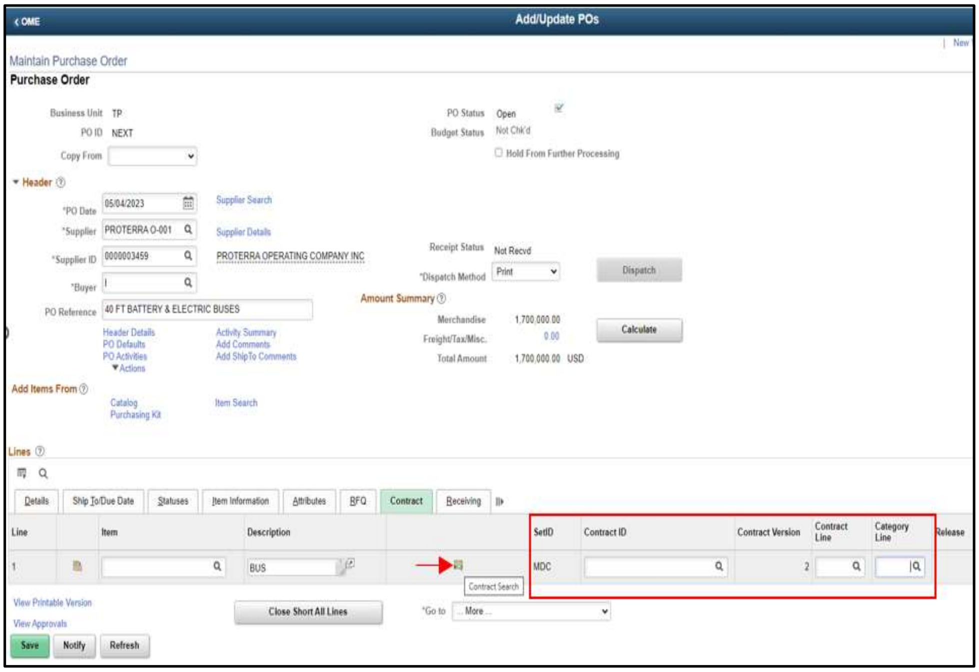
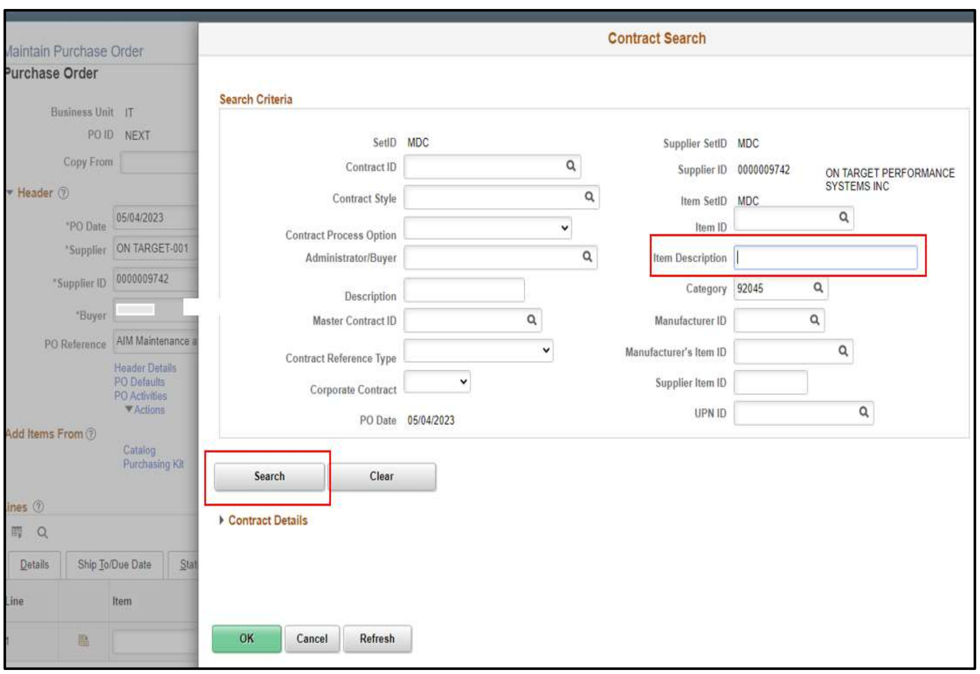
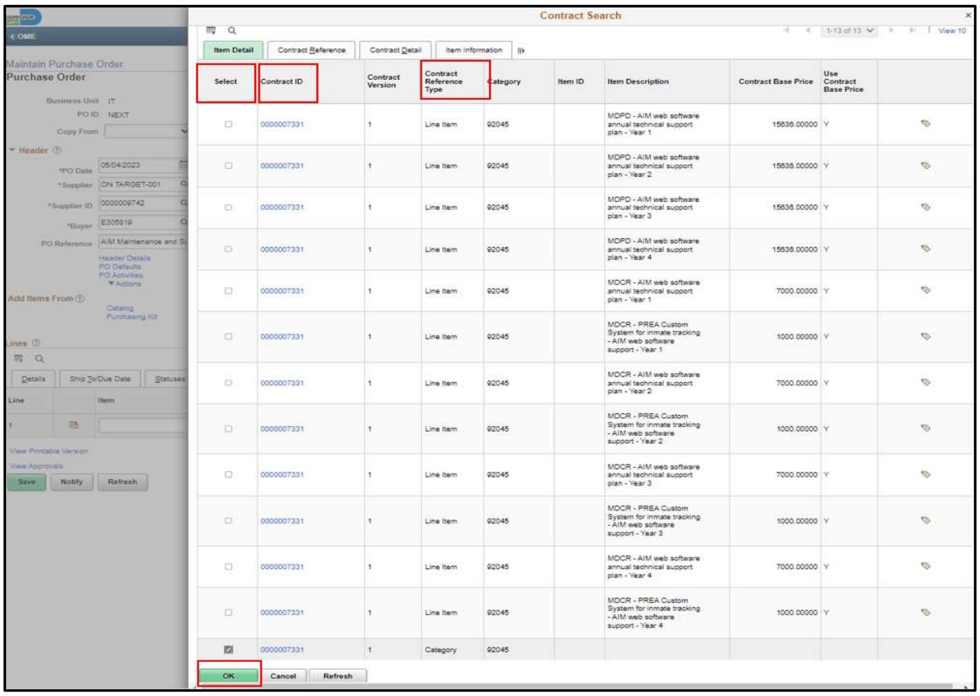
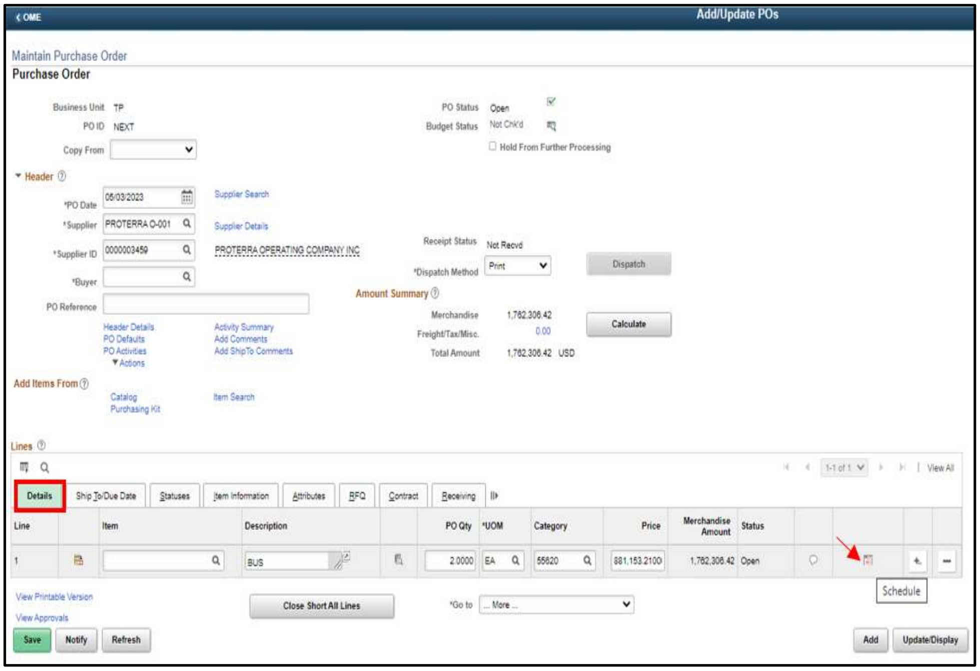
Step	Action
5.	Select the **Add** button. 
6.	Input or search for the supplier in the system by entering the supplier's name in the "**Supplier**" field or entering the **Supplier ID** in the corresponding field. 

Step	Action
7.	Input the applicable line information in the details tab. • **Description** • **PO Qty** • **UOM** • **Category*** • **Price** * When creating a General Purchase Order (PO), it is important to input the category that corresponds to the contract. **Note:** Do not input any information in the Item Field 

Step	Action
8.	If a *General Purchase Order (PO)*, 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. 
9.	Clear all the information from the Item Description field and select the **Search** button. 

Step	Action
10.	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. **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. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>Select the Details tab and select on the Schedule Icon.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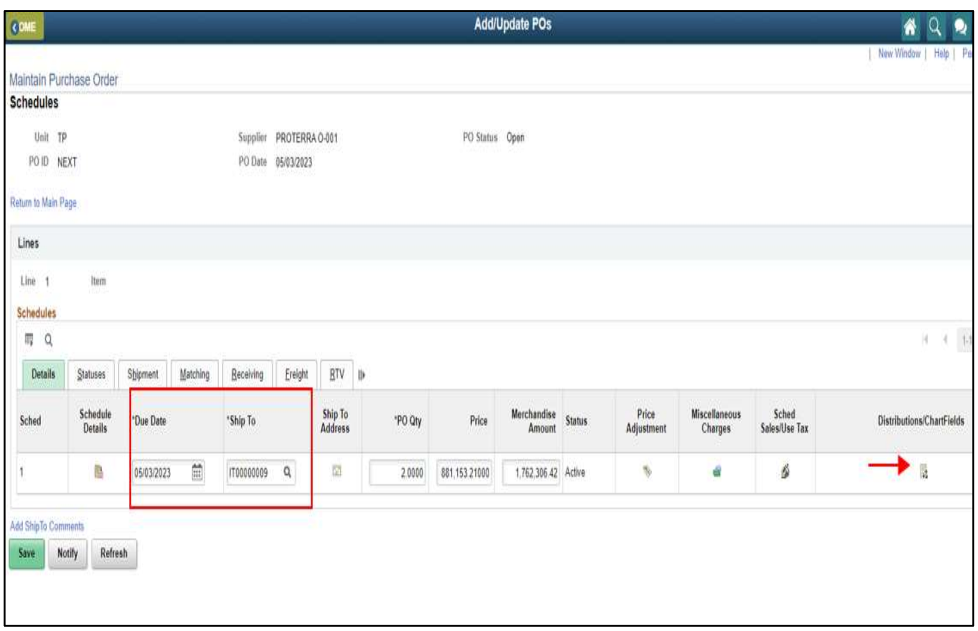
<tr><td>12.</td><td>Select the Due Date, Ship To location, and select on the Distribution/ChartFields Icon.


</td></tr>
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13.

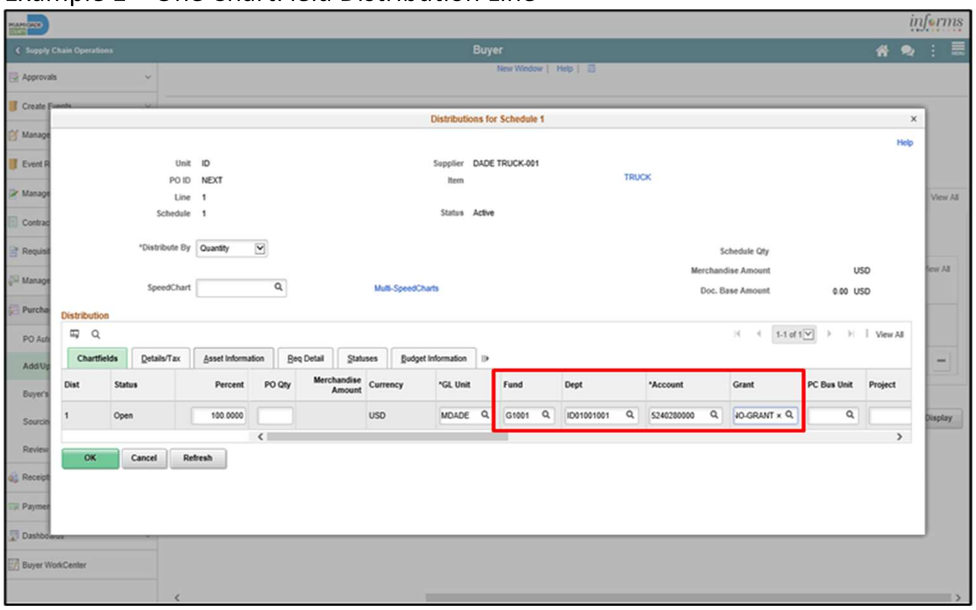
Input the ChartField details.

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

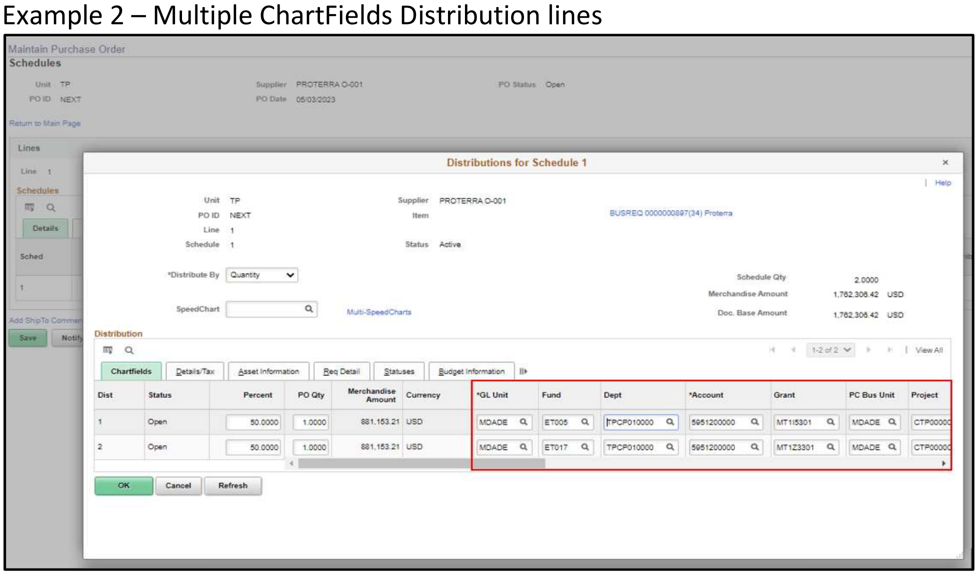
*****Grant is a required field. Buyer needs to input 'NO-GRANT' or input the correct Grant number**.**

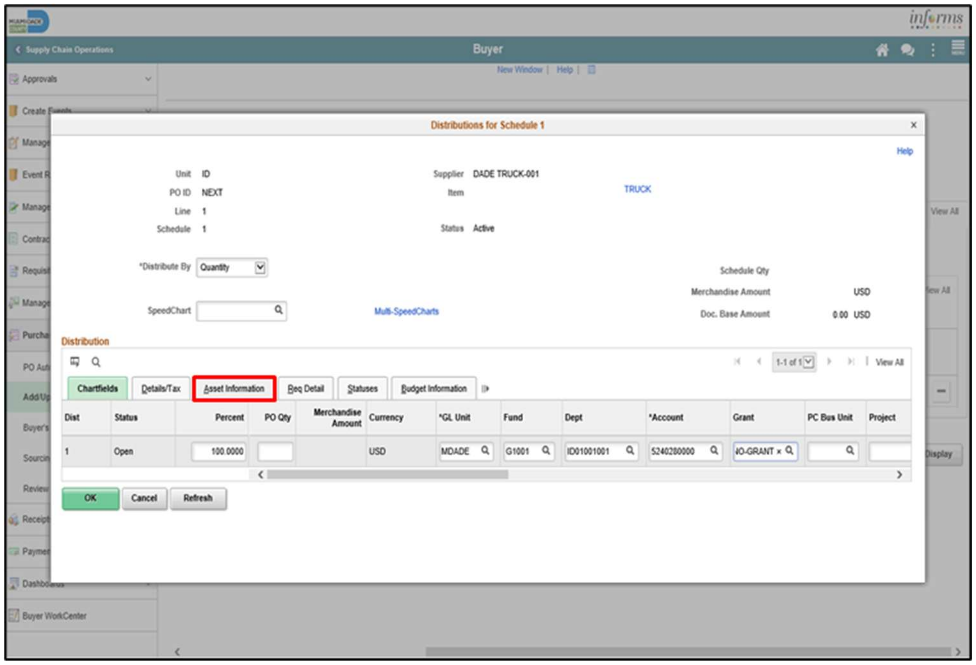
Note: In case you require more than one funding source, you can add additional ChartFields Distribution Lines.

Example 1 – One ChartField Distribution Line



Example 2 – Multiple ChartFields Distribution lines



Step	Action
14.	Select the **Asset Information** tab. 

<table>
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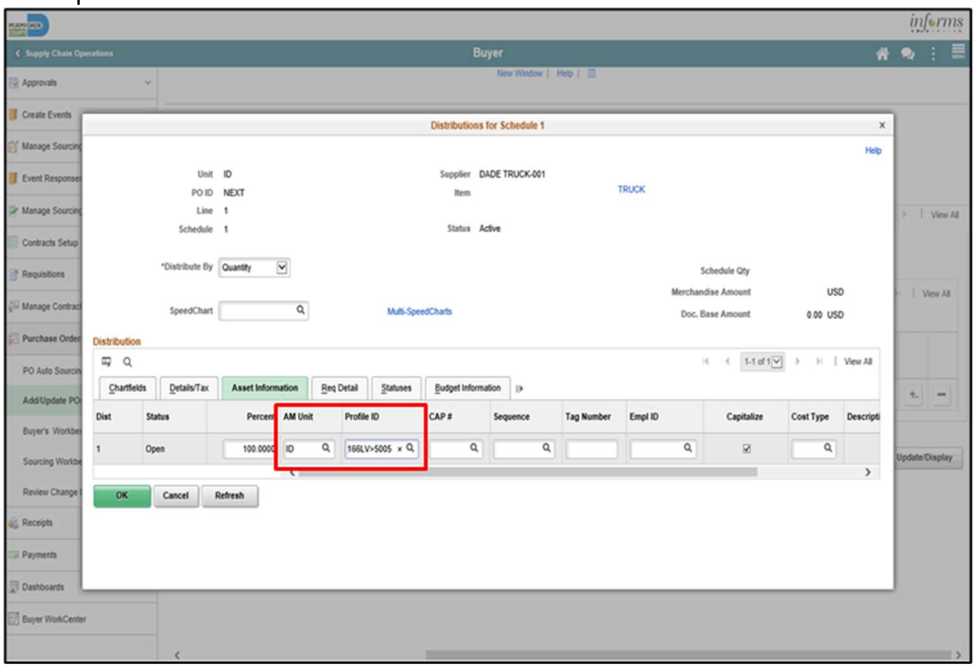
<tr><td>15.</td><td>

Input the Asset details.

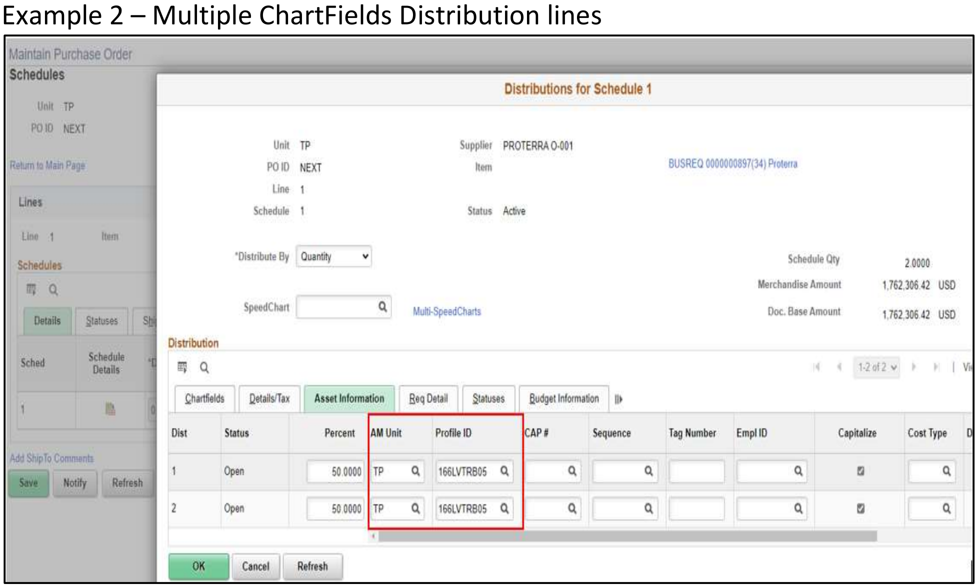
- **AM Unit**
- **Profile ID**

Note: The above information should be obtained from the Capital Inventory Officer or the Departmental Accounting Staff before submitting the PO for approval.
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.

Example 1 – One ChartField Distribution Line



Example 2 – Multiple ChartFields Distribution lines



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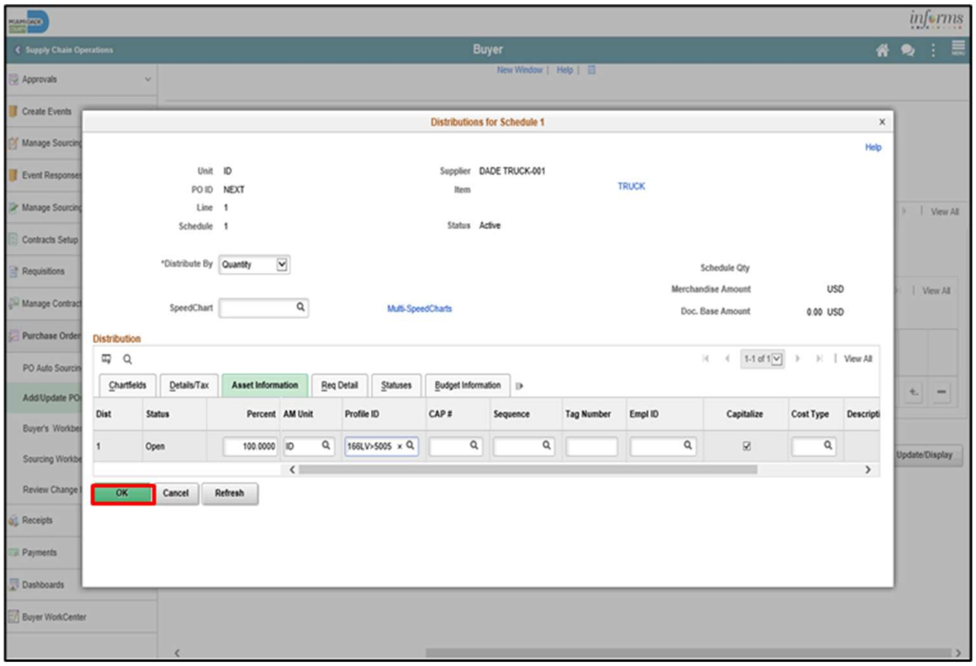
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16.</td><td>Select the OK button.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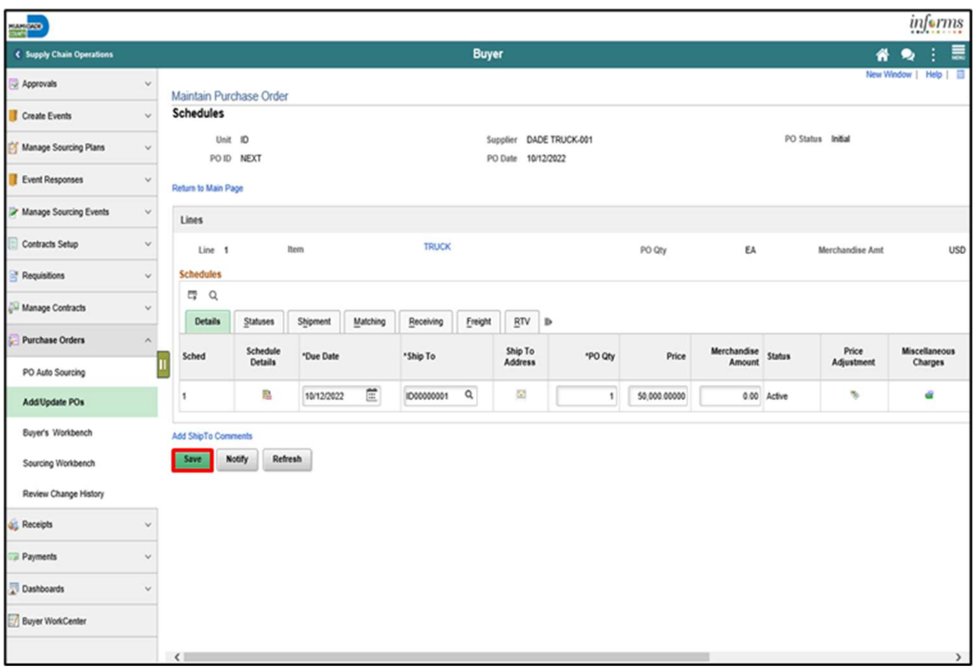
<tr><td>17.</td><td>Select the Save button.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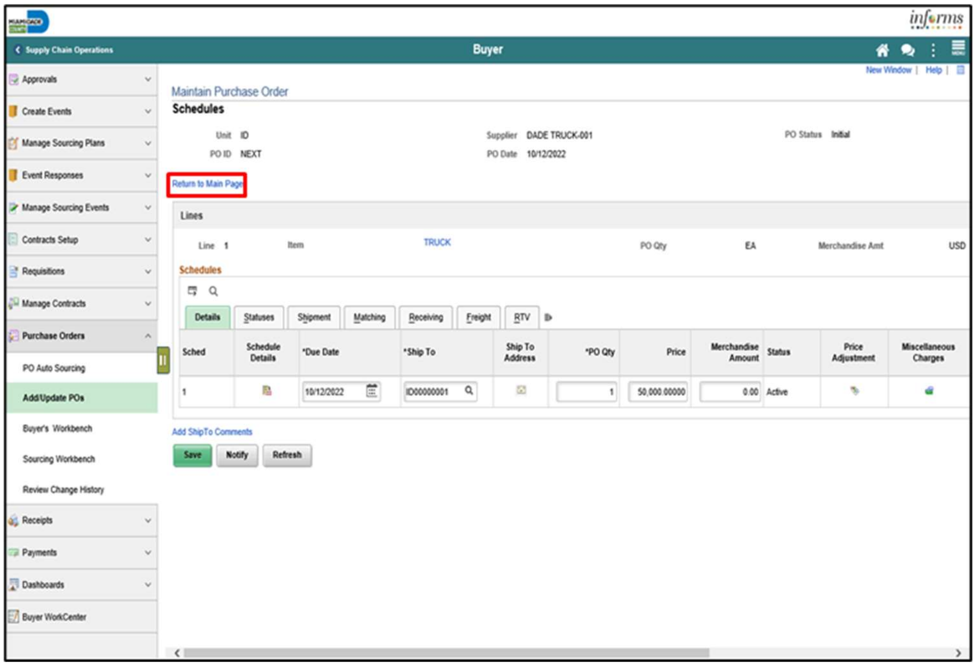
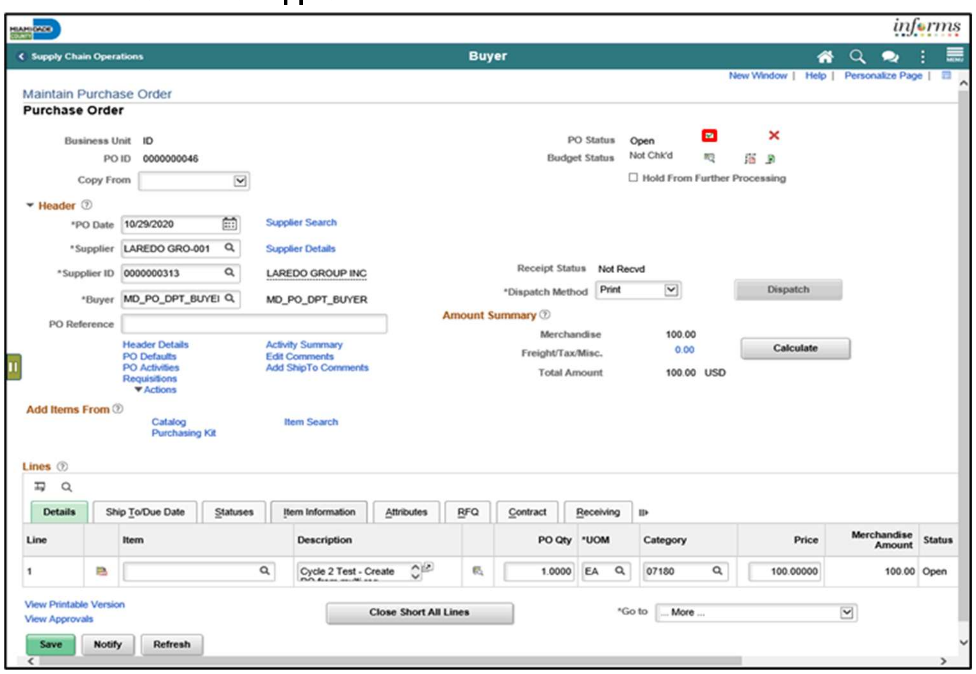
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18.</td><td>Select the Return to Main Page hyperlink.



</td></tr>
<tr><td>19.</td><td>Select the Submit for Approval button.



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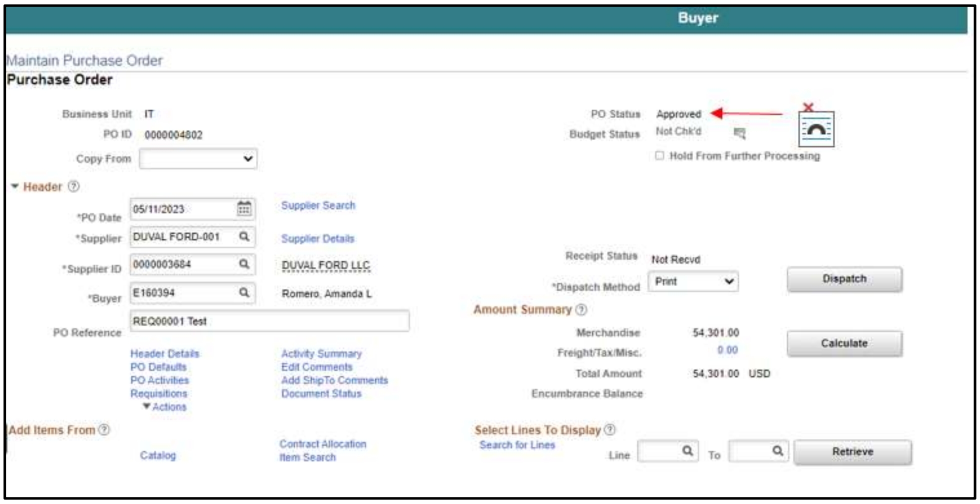
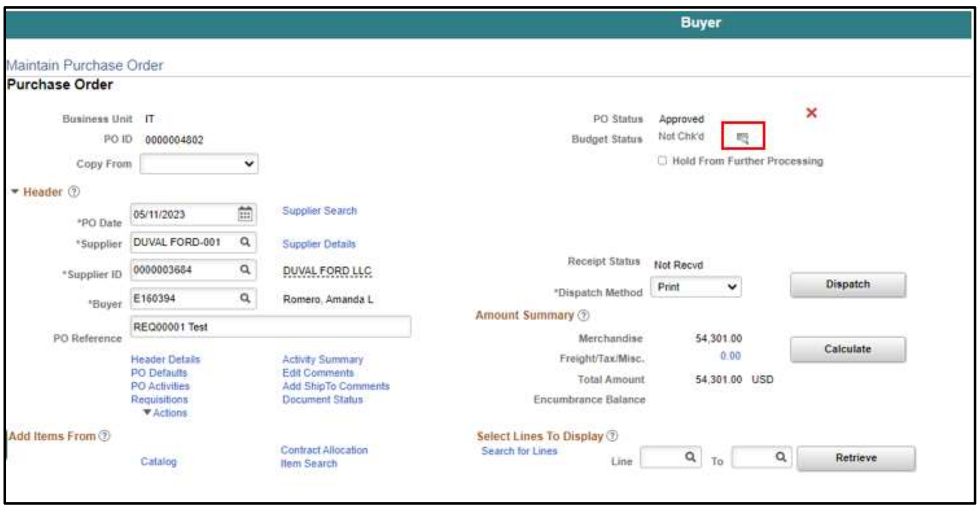
<tr><th>Step</th><th>Action</th></tr>
<tr><td>20.</td><td>
After the PO has been approved. The PO status changes to “Approved”.
Click the magnifying glass icon next to Budget Status to submit the PO for budget checking process.





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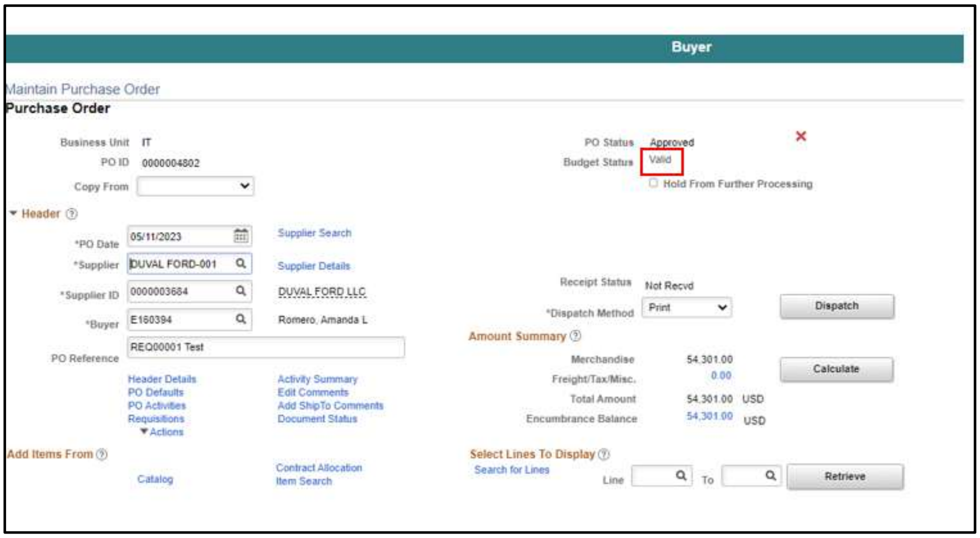
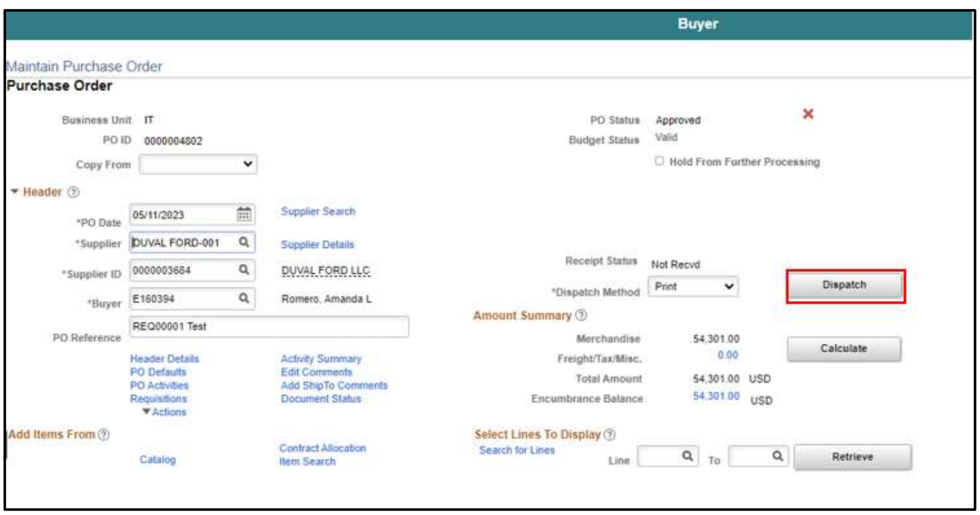
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>21.</td><td>After the PO has been submitted for Budget Checking the PO budget status should change to “Valid”
Note: If there are any issues in the Budget Checking process the system will display either an error message or will place the PO in Budget status of Error. A new window will display with the budget error.
Contact your BU (Business Unit) budget analyst and provide a screen shot of the budget error window displaying the budget error message.

</td></tr>
<tr><td>22.</td><td>Click the “Dispatch” button.

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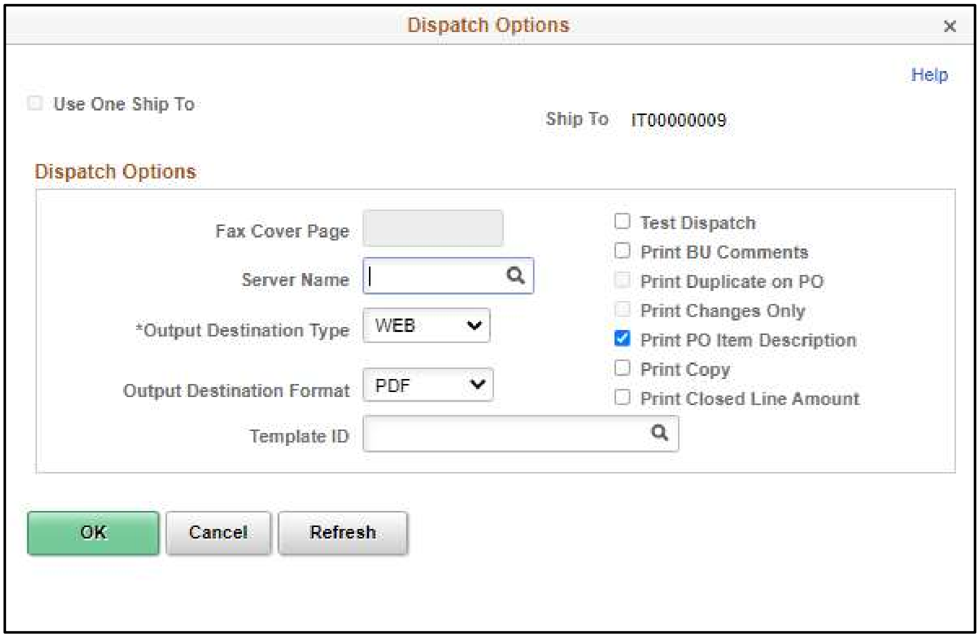
<tr><th>Step</th><th>Action</th></tr>
<tr><td>23.</td><td>Click “OK”



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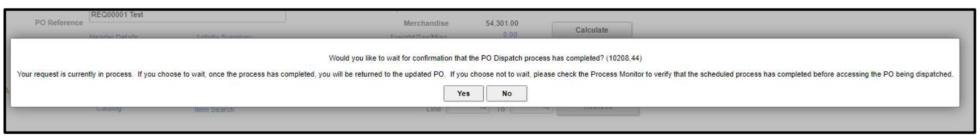
<tr><td>24.</td><td>Click “Yes”



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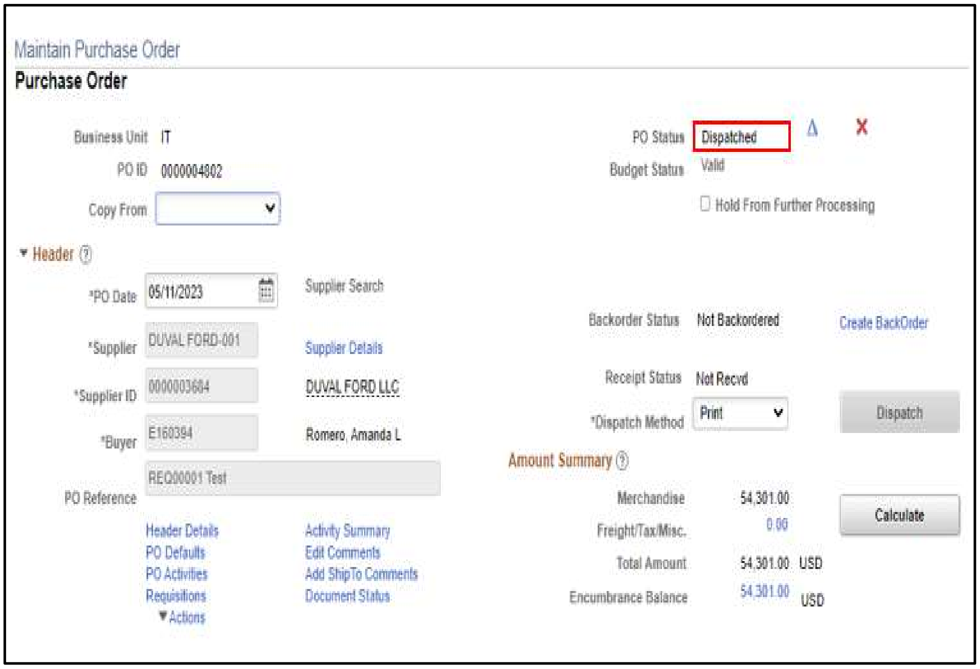
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>25.</td><td>Notice “PO Status” changed to “Dispatched”.

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