TSR USER GUIDE
Direct Purchase Orders
And Purchase Order Change Orders

JULY 2010

DoIT Training Department

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Telephone Service Request (TSR) Process

Effective July 1, 2010, a new Telephone Service Request, (TSR) process will be in effect. There are two manuals to assist you in this new process. Direct Purchase Order Processing and Requisition / Purchase Order Processing. Both of these manuals also include Change Orders.

The following pages will reflect the new procedures needed to accomplish this process.

In the past, DoIT created Purchase Order for agencies upon submission of a requisition to the 060T1 ADPICS mailbox. DoIT was responsible for printing and sending the Purchase Order to the appropriate vendor.

The new process will give agencies the ability to create their own purchase orders. The suggested and preferred method is using the Direct Purchase Order instead of the use of Requisitions to Purchase Orders. A Direct Purchase Order completely bypasses the requisition process. Agencies can, however, can continue to create Requisitions and Purchase Orders. **It should be noted that changes to these documents are timely and cumbersome. For this reason, we suggest the Direct Purchase order method.**

Once the agency creates the TSR Purchase Order or Purchase Order Change Order, the documents should go through an Agency internal approval path. After the Agency approval path is complete, the TSR Purchase Order or Purchase Order Change Order will be directed to DoIT for final approval. DoIT will be the final poster.

If there is an issue with your request, the TSR Purchase Order or Purchase Order Change Order will always be rejected back to the Initiator. DoIT Telecommunications Department will enter information in the note pad of the Purchase Order or Change Order to ensure that the initiator will be able to make the necessary corrections. After corrections are made, the initiator will submit the document back into the approval process.

It is the Agency's responsibility to monitor their Purchase Order or Change Orders to determine if the document has been posted. You can monitor on the ADPICS 2340, 2360, 9230 or 2410 screens.

Things you need to know before creating a TSR after July 1, 2010

Decide within your agency if the Agency Telecommunication Coordinators or your procurement department will be creating the Purchase Orders.

If the Telecommunication Coordinators will be creating the purchase orders, security must be obtained. Currently, some Telecommunication Coordinators (TCs) have only the capability to create requisitions. You must see your FMIS Security Officer to have your security modified. If you do not know who that is, contact the DoIT Service Desk for assistance or go to http://doit.maryland.gov/support/Pages/ASMSecurityForms.aspx for a complete listing of Agency Security Officers and Coordinators.

Agencies are responsible for maintaining their own internal approval paths for TSR's. Previous TSR approval paths will not necessarily be valid.

No specific Doc Type is necessary for TSR processing.

Agencies are responsible for printing out the purchase order and submitting to correct vendor. Vendor contact and faxing information will be available on each of the DoIT Telecommunications BPO's websites.

Existing Blanket Purchase Orders have all been expired and new Blanket Purchase Orders have been created. Refer to the crosswalk at the end of this manual and also on our website (link below). http://doit.maryland.gov/contracts/Pages/TelecommContracts.aspx

There are several way of processing a TSR. Location and Agency drives which process you will use. Some agencies may utilize all of the processes. Refer to our e Learning module on the DoIT website for further clarification. The link to the training website is http://asm.dbm.state.md.us/training/. Call the Service Desk for a logon ID and password.

Direct Purchase Orders

After logging into FMIS from the ADPICS Main Menu either link to the 2360 screen or press F2 to advance you to the Procurement Transaction menu.

```
PCHL0000 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/06/2010   3:25 PM
LINK TO:                              MAIN MENU

                       COPYRIGHT 1994 KPMG PEAT MARWICK LLP

              USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                    (1)  - ACCOUNTS PAYABLE MENU
                    (2)  - PROCUREMENT TRANSACTIONS MENU
                    (3)  - RECEIVING MENU
                    (4)  - INVENTORY TRANSACTIONS MENU
                    (5)  - TABLE MAINTENANCE MENU
                    (6)  - REPORT PROCESSING MENU
                    (7)  - SYSTEMS MANAGEMENT MENU
                    (8)  - CHANGE ORDER PROCESSING MENU

                    (10) - DOCUMENT AUTHORIZATION MENU
                    (11) - COMMODITY TABLE INQUIRY
                    (12) - VENDOR TABLE INQUIRY
                    (CL) - EXIT
```

Press F4 to advance to the 2360 Direct Purchase Order Writing screen.

```
PCHL2000 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/06/2010   3:26 PM
LINK TO:                      PROCUREMENT TRANSACTIONS MENU

                       COPYRIGHT 1994 KPMG PEAT MARWICK LLP

              USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                    (1)  - REQUISITION PROCESSING
                    (2)  - ITB AND BID PROCESSING
                    (3)  - PURCHASE ORDER WRITING
                    (4)  - DIRECT PURCHASE ORDER WRITING
                    (5)  - BLANKET PURCHASE ORDER WRITING
                    (6)  - PURCHASE ORDER INQUIRY MENU
                    (7)  - REQUISITION INQUIRY MENU
                    (8)  - CONTRACT ADDITIONAL ELEMENTS




                    (CL) - EXIT
```

Direct Purchase Order - BPO ID

```
PCHL2360 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/12/2010   6:24 PM
LINK TO:                     DIRECT PURCHASE ORDER     GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                      VENDOR CHG: Y  NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00      INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/12/10
ACTION IND     : N   WAREHOUSE:     BUYER:     FILTER IND:    POST:
CONTRACT AMOUNT:                REMAINING BAL:               STATUS: NOPT
VENDOR         : 1161337624 VERIZON                          EXPEDITOR  :
ADDRESS        : PO BOX 101956                               TRACK CODE :
               :                                             DATE :
          CITY: ATLANTA                   ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK                BPO ID : 060B0400001
ADDRESS        : 45 CALVERT ST                           EXPR DATE:
                 SECOND FLOOR                            FOB POINT: DEST
          CITY: ANNAPOLIS                ST: MD ZIP: 21401
BILL TO NAME   :                          BILL TO ADDRESS CODE:     QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET       SUBCONTR: N
SF AGY YR INDEX  PCA    OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT
01 R00 10      10015        0808


F1-HELP  F2-COPY     F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT   ENTER-INQ CL-EXIT
```

When you create your Direct Purchase Order, you will need to choose the correct BPO for the good or services you are requesting.

NOTE: A listing of current BPO's are at the end of this manual and also on the DoIT website. Visit our website at - doit.maryland.gov for additional information. Website information is most current.

Enter your BPO and press F10 SAVE to pull your information forward.

Direct Purchase Order Interface Types

```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   05/12/2010   6:24 PM
LINK TO:                   DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                   VENDOR CHG: Y  NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00     INTF TYPE : DP      CATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/12/10
ACTION IND    : N   WAREHOUSE:    BUYER:      FILTER IND:     POST:
CONTRACT AMOUNT:              REMAINING BAL:              STATUS: NOPT
VENDOR        : 1161337624 VERIZON                 EXPEDITOR  :
ADDRESS       : PO BOX 101956                      TRACK CODE :
              :                                    DATE :
         CITY: ATLANTA              ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK              BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                     EXPR DATE:
                SECOND FLOOR                       FOB POINT: DEST
         CITY: ANNAPOLIS            ST: MD ZIP: 21401
BILL TO NAME  :                    BILL TO ADDRESS CODE:     QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET       SUBCONTR: N
SF AGY YR INDEX  PCA    OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3    PERCENT
01 R00 10      10015       0808



F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT   ENTER-INQ CL-EXIT
```

The previously established document types for TSR processing that were used with the requisition documents are not valid with Direct Purchase (DP) Orders. Your agency will possibly need to establish new approval paths for your TSR DP's to follow.   They may, however, already have a DP order approval paths established.

This information MUST be discussed with someone in your agency that creates approval paths.

You do not have to worry about including DoIT within your agency approval paths. A commodity approval path has been established for all purchase orders and direct purchase orders.

NOTE: It is important to note there may be TSR approval paths that are internal to your agency currently established. These were for requisitions only and will not work with the Direct Purchase Order processing.

DoIT Training Department

Direct Purchase Order Processing


```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   6:39 PM
LINK TO:                       DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NEOP                      VENDOR CHG: Y  NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022 DEPT: R00    INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB  EFF DATE: 05/07/2010 UPDATE: 05/12/10
ACTION IND    : N   WAREHOUSE:        BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:              REMAINING BAL:              STATUS: NOPT
VENDOR        : 1161337624 VERIZON                        EXPEDITOR :
ADDRESS       : PO BOX 101956                             TRACK CODE :
              :                                           DATE :
          CITY: ATLANTA                   ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK              BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                             EXPR DATE:
                SECOND FLOOR                               FOB POINT: DEST
          CITY: ANNAPOLIS                  ST: MD ZIP: 21401
BILL TO NAME  :                   BILL TO ADDRESS CODE:        QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010    TERMS: NET        SUBCONTR: N
SF AGY YR INDEX  PCA    OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3    PERCENT
01 R00 10      10015      0808



F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
```

The following information will need to be entered on your Direct Purchase Order header 2360 screen:

Enter the appropriate Buyer Code if necessary.

Enter the appropriate Delivery Date.

Enter the appropriate accounting information.

Press F10 to Save.

Direct Purchase Order Processing Match Type

```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/13/2010   5:37 PM
LINK TO:                     DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NEOP                    VENDOR CHG: Y  NOTE: Y PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022 DEPT: R00    INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/13/10
ACTION IND    : N   WAREHOUSE:    BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:        50.00 REMAINING BAL:        50.00 STATUS: NOPT
VENDOR        : 1161337624 VERIZON                    EXPEDITOR  :
ADDRESS       : PO BOX 101956                         TRACK CODE :
              :                                       DATE :
         CITY: ATLANTA               ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK             BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                       EXPR DATE:
                SECOND FLOOR                         FOB POINT: DEST
         CITY: ANNAPOLIS              ST: MD ZIP: 21401
BILL TO NAME  :                    BILL TO ADDRESS CODE:      QUOTE: N
DIST METHOD: S  DELIVERY DATE: 12/25/2010 DISC TERMS: NET     SUBCONTR: N
SF AGY YR INDEX  PCA    OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3    PERCENT
01 R00 10      10015      0808



F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
```

For both Purchase Orders and Direct Purchase Order documents, a valid Match Type must be entered. Check with your procurement and accounting departments to determine which match type you should use. *For this example we are using AB, which is a progressive payment match type.* NOTE: This is for our example only – please realize this will most likely change at your agency.

The match type is important because it determines how payments can be made and also determines when a voucher will be created so the bill can be paid. Some match types require receiving reports and some do not. If your agency does not use receiving reports, then you want to make sure you do not choose a match type that requires one.

Additional Match Type information can be obtained on the 1310 screen in ADPICS

After entering your Match Type press F10-SAVE to save this information to your document.

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Selecting the Commodity

```
PCHL2365 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/12/2010   6:41 PM
LINK TO:              DIRECT PURCHASE ORDER DETAIL ENTRY
PURCHASE ORDER: R00P0400022     LINE NO.: 001   BUYER: RB13       WHSE :
COMMODITY    :                                            BPO LINE NO:
PART NO      :
QUANTITY     :                  STATE TAX :      LOCAL TAX :
PURCHASE U/M  :        UNIT COST:          0.0000  TOTAL COST:          0.00
BLOCK FUNCTION:        (SPEC ID TO COPY, ISRT, DLET, DUP)
SPECIFICATION INFO                                 BLOCK 001 OF 001
                                                                    <
                                                                    <
                                                                    <
                                                                    <
                                                                    <
                                                                    <
                                                                    <
                                                                    <
                                                                    <
                                                                    <
SPEC IDS:
F1-        F2-SEL COMM  F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-PRIOR BLK
F8-NEXT BLK        F9-LINK   F10-SAVE      F11-BLOCK FUNC     F12-LINE ACNTG
ENTER-INQUIRE         CL-EXIT
PLEASE ENTER DETAILS FOR DIRECT PO LINE
```

The system advances you to the 2365 Direct Purchase Order Detail Entry screen once a Purchase Order ID
has been established.   The cursor should be blinking on the commodity field. Press F2 – SEL COMM to
select the appropriate commodity from the BPO you choose.

DoIT Training Department

Selecting the Commodity - continued

```
PCHL2348 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/12/2010   6:44 PM
LINK TO:                 BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : 060B0400001     REMAINING VALUE:        50.00 ALL:   I/D:
VENDOR ID   : 1161337624  VERIZON
MULT VENDORS: N (Y/N)          F/P:    AMOUNT:              PCT:
S COMMODITY ID     LINE ORIG-LINE QTY AVLBL         UNIT COST   TOTAL AVAIL
   COMMODITY DESCRIPTION
   99789-PBX101     0001
   TSR PBX 1 VERIZON TELEPHONE SWITCH
s  99789-PBX102     0002
   TSR PBX 1 VERIZON TELEPHONE MOVES ADDS CHANGES
   99789-PBX103     0003
   TSR PBX 1 VERIZON VOICEMAIL
   99789-PBX104     0004
   TSR PBX 1 VERIZON CABLING INSIDE
   99789-PBX105     0005
   TSR PBX 1 VERIZON PERIPHERALS-ACD, IVR, ETC.
   99789-PBX106     0006
   TSR PBX 1 VERIZON OTHER MISC SERVICES RELATED TO PBX1 STATEWIDE CONTRAC


F1-HELP  F2-SELECT   F3-DELETE  F4-TEXT  F5-NEXT      F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK F10-SAVE  F11-TOGGLE  F12-VIEW VEN  ENTER-INQUIRE  CL-EXIT
INQUIRY SUCCESSFUL
```

The system advances you to the **2348 Blanket Purchase Order Detail screen**. Tab to the commodity line item you which to choose and tag the line item with the letter **S**.

Press F6-RETURN to return this line item back to your direct purchase order.

NOTE:

   Be sure that the screen shows 2348 Blanket Purchase Order Details screen. If it does not, chances are the BPO was not entered on the header screen for the Direct Purchase Order. Your commodities MUST be selected from the 2348 screen. If you have questions, contact the Service Desk.

DoIT Training Department

Selecting the Commodity - continued

```
PCHL2365 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   6:49 PM
LINK TO:              DIRECT PURCHASE ORDER DETAIL ENTRY
PURCHASE ORDER: R00P0400022    LINE NO.: 001   BUYER: RB13         WHSE :
COMMODITY    : 99789-PBX102       TELE MAC-MOVE ADD CHANGE  BPO LINE NO: 0002
PART NO      :
QUANTITY     :         1.00    STATE TAX :      LOCAL TAX :
PURCHASE U/M  : EA    UNIT COST:        50.0000  TOTAL COST:        50.00
BLOCK FUNCTION:      (SPEC ID TO COPY, ISRT, DLET, DUP)
SPECIFICATION INFO                          BLOCK 001 OF 001
REQUESTING THE FOLLOWING TELEPHONE CHANGES:                    <
MOVE DONALD DUCK'S LINE 410 836-4701 TO JACK V6 (X4972) AND    <
MOVE 410 836-4972 TO WHERE 410 836-4701 IS AND ADD MINNIE MOUSE <
TO THIS EXT. 4701.                                            <
                                                             <
                                                             <
                                                             <
                                                             <
                                                             <
                                                             <

SPEC IDS:
F1-HELP F2-SEL PART  F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-PRIOR BLK
F8-NEXT BLK          F9-LINK   F10-SAVE      F11-VIEW ACNTG      F12-LINE ACNTG
ENTER-INQUIRE        CL-EXIT
```

Enter the appropriate Quantity, U/M and Unit Cost for the item. Specific instructions should be noted in the Specifications Info section. Press F10 to SAVE your entry.

```
PCHL2365 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   6:50 PM
LINK TO:              DIRECT PURCHASE ORDER DETAIL ENTRY
PURCHASE ORDER: R00P0400022    LINE NO.: 002   BUYER: RB13         WHSE :
COMMODITY    : ■                                        BPO LINE NO:
PART NO      :
QUANTITY     :              STATE TAX :      LOCAL TAX :
PURCHASE U/M  :     UNIT COST:         0.0000  TOTAL COST:         0.00
BLOCK FUNCTION:      (SPEC ID TO COPY, ISRT, DLET, DUP)
SPECIFICATION INFO                          BLOCK 001 OF 001
```

Once F10 SAVE is pressed, the system advances you to line number 002. Enter additional requests, if necessary and press F10 to SAVE your entry. If there are no additional requests, then press Esc to return to the 2360 Direct Purchase Order header screen.

DoIT Training Department

Direct Purchase Order Specification/Terms

```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010  6:53 PM
LINK TO:                    DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                    VENDOR CHG: Y  NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00    INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/12/10
ACTION IND    : N   WAREHOUSE:    BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:        50.00 REMAINING BAL:        50.00 STATUS: NOPT
VENDOR        : 1161337624 VERIZON                        EXPEDITOR  :
ADDRESS       : PO BOX 101956                             TRACK CODE :
              :                                           DATE :
        CITY: ATLANTA                    ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK                BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                  EXPR DATE:
                SECOND FLOOR                    FOB POINT: DEST
        CITY: ANNAPOLIS                  ST: MD ZIP: 21401
BILL TO NAME   :                        BILL TO ADDRESS CODE:      QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET        SUBCONTR: N
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT
01 R00 10      10015        0808



F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS    F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
```

Specific Terms must be added to your document before Posting or placing into an approval path. From the Header page, press F8-SEL TERMS.

DoIT Training Department

Direct Purchase Order Specification/Terms - continued

```
PCHL2126 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   05/12/2010   6:56 PM
LINK TO:                SPECIFICATIONS/TERMS SELECTION

DOCUMENT ID : R00P0400022    LINE NO:     000
S    ID              SHORT TITLE       S    ID          SHORT TITLE




BLOCK FUNCTION:       (TERM ID TO COPY, ISRT, DLET, DUP)    BLOCK 001 OF 001






F1-HELP     F2-SELECT  F3-DELETE   F4-BLOCK FUNC      F7-PRIOR BLK
F8-NEXT BLK F9-LINK    F10-SAVE                       ENTER-INQUIRE   CL-EXIT
```

The system takes you to the 2126 Specifications/Terms Selection screen. You will need to insert a predefined set of terms into your document.

```
PCHL2126 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   05/12/2010   6:57 PM
LINK TO:                SPECIFICATIONS/TERMS SELECTION

DOCUMENT ID : R00P0400022    LINE NO:     000
S    ID              SHORT TITLE       S    ID          SHORT TITLE




BLOCK FUNCTION: ■    (TERM ID TO COPY, ISRT, DLET, DUP)    BLOCK 001 OF 001






F1-HELP     F2-SELECT  F3-DELETE   F4-BLOCK FUNC     F7-PRIOR BLK
F8-NEXT BLK F9-LINK    F10-SAVE                       ENTER-INQUIRE   CL-EXIT
ENTER SPEC/TERM ID TO BE COPIED, OR BLOCK FUNCTION
```

Press F4-BLOCK FUNC to move your cursor to the Block Function field.

DoIT Training Department

Direct Purchase Order Specification/Terms - continued

```
PCHL2126 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   6:57 PM
LINK TO:                SPECIFICATIONS/TERMS SELECTION

DOCUMENT ID : R00P0400022    LINE NO:      000
S    ID              SHORT TITLE        S    ID              SHORT TITLE




BLOCK FUNCTION: ftsr1 (TERM ID TO COPY, ISRT, DLET, DUP)    BLOCK 001 OF 001






F1-HELP      F2-SELECT  F3-DELETE   F4-BLOCK FUNC        7-PRIOR BLK
F8-NEXT BLK  F9-LINK    F10-SAVE                         ENTER-INQUIRE   CL-EXIT
ENTER SPEC/TERM ID TO BE COPIED, OR BLOCK FUNCTION
```

Enter the name of the predefined (or saved) set of terms in the Block Function field. The name of this term is **ftsr1**. Press F4-BLOCK FUNC again to bring the file forward.

```
PCHL2126 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   7:01 PM
LINK TO:                SPECIFICATIONS/TERMS SELECTION

DOCUMENT ID : R00P0400022    LINE NO:      000
S    ID              SHORT TITLE        S    ID              SHORT TITLE




BLOCK FUNCTION:      (TERM ID TO COPY, ISRT, DLET, DUP)    BLOCK 001 OF 001
     BILLING TELEPHONE NUMBER:
     LOCATION:
     .
     LOCATION CONTACT PERSON (ON-SITE):
     LOCATION TELEPHONE NUMBER:
     VENDOR'S B/U ACCT. NUMBER:
     LOCATION NUMBER:
     CENTREX'S BAC:                   LOCATION GROUP:


F1-HELP      F2-SELECT  F3-DELETE   F4-BLOCK FUNC      F7-PRIOR BLK
F8-NEXT BLK  F9-LINK    F10-SAVE                       ENTER-INQUIRE   CL-EXIT
SPEC/TERM TEXT COPIED
```

Direct Purchase Order Specification/Terms - continued

```
PCHL2126 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/12/2010   7:03 PM
LINK TO:                 SPECIFICATIONS/TERMS SELECTION

DOCUMENT ID : R00P0400022    LINE NO:     000
S    ID             SHORT TITLE        S    ID            SHORT TITLE




BLOCK FUNCTION:      (TERM ID TO COPY, ISRT, DLET, DUP)    BLOCK 001 OF 001
       BILLING TELEPHONE NUMBER:    410-XXX-XXXX
       LOCATION:     NORTH POLE
       .
       LOCATION CONTACT PERSON (ON-SITE):  TC COORDINATOR
       LOCATION TELEPHONE NUMBER:    410-XXX-XXXX
       VENDOR'S B/U ACCT. NUMBER:
       LOCATION NUMBER:
       CENTREX'S BAC:                       LOCATION GROUP:


F1-HELP     F2-SELECT  F3-DELETE   F4-BLOCK FUNC      F7-PRIOR BLK
F8-NEXT BLK  F9-LINK    F10-SAVE                      ENTER-INQUIRE   CL-EXIT
RECORD REPLACED
```

Enter the appropriate information and press F10-SAVE when complete. Press Escape to return to the Direct Purchase Order header screen.

Adding a Note to Your Direct Purchase Order

```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/13/2010    4:03 PM
LINK TO: note                    DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                      VENDOR CHG    NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00    INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/13/10
ACTION IND    : N   WAREHOUSE:    BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:        50.00 REMAINING BAL:        50.00 STATUS: NOPT
VENDOR        : 1161337624 VERIZON                        EXPEDITOR  :
ADDRESS       : PO BOX 101956                             TRACK CODE :
              :                                           DATE :
        CITY: ATLANTA                    ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK                  BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                       EXPR DATE:
                SECOND FLOOR                        FOB POINT: DEST
        CITY: ANNAPOLIS                 ST: MD ZIP: 21401
BILL TO NAME  :                        BILL TO ADDRESS CODE:      QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET        SUBCONTR: N
SF AGY YR INDEX  PCA    OBJ    AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3     PERCENT
01 R00 10      10015       0808


F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
```

You have the ability to attach a note to your document. It can assist you in keeping track of specific items related to the TSR document. If a document has a note attached to it, it will display the letter Y in the NOTE PAD field.

From the header page, press your Home key to move your cursor to the LINK TO field. Enter the word note and press F9-LINK to advance to the Electronic NOTE PAD 9100 screen.

DoIT Training Department

Adding a Note to Your Direct Purchase Order - continued

```
PCHL9100 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/07/2010  11:46 AM
LINK TO:                     ELECTRONIC NOTE PAD                PAGE  01 OF 01

   DPO HEADER    2360

   Enter in any information you feel is pertinent for this doucment and
   press F10 to Save




     F1-HELP    F4-AUDIT   F5-TOP         F6-COPY       F7-PR PAGE   F8-NX PAGE
     F9-LINK    F10-SAVE   F11-INS PAGE   F12-DEL PAGE  ENTER-INQUIRE   CL-EXIT
PAGE DOES NOT EXIST
```

From the 9100 screen enter in any information you feel in pertinent for this document and press F10-SAVE when complete.

```
PCHL9100 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/13/2010   4:15 PM
LINK TO:                     ELECTRONIC NOTE PAD                PAGE  01 OF 01

   DPO HEADER    2360

   ENTER IN ANY INFORMATION YOU FELL IS PERTINENT FOR THIS DOCUMENT AND
   PRESS F10 TO SAVE




     F1-HELP    F4-AUDIT   F5-TOP         F6-COPY       F7-PR PAGE   F8-NX PAGE
     F9-LINK    F10-SAVE   F11-INS PAGE   F12-DEL PAGE  ENTER-INQUIRE   CL-EXIT
NOTEPAD ENTRY SAVED
```

Once F10-SAVE is pressed, your note pad entry changes to all upper case letters and the message NOTEPAD ENTRY SAVED appears at the bottom of your screen. Press Escape to return to the Direct Purchase order header screen.

Adding a Note to Your Direct Purchase Order - continued

```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   05/13/2010   4:30 PM
LINK TO:                    DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                 VENDOR CHG      NOTE: Y PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00     INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/13/10
ACTION IND    : N   WAREHOUSE:    BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:          50.00 REMAINING BAL:          50.00 STATUS: NOPT
VENDOR        : 1161337624 VERIZON                       EXPEDITOR  :
ADDRESS       : PO BOX 101956                            TRACK CODE :
              :                                          DATE :
          CITY: ATLANTA                 ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK                BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                      EXPR DATE:
                SECOND FLOOR                       FOB POINT: DEST
          CITY: ANNAPOLIS               ST: MD ZIP: 21401
BILL TO NAME   :                        BILL TO ADDRESS CODE:     QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET       SUBCONTR: N
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT
01 R00 10      10015        0808


F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
```

Once the note pad has been saved, the NOTE PAD field will display the letter Y for 'Yes, there is a note attached to this document.' You can read the note pad at anytime, just by linking to the 9100 screen or by placing the word NOTE in the LINK TO field and pressing F9-LINK.

DoIT Training Department

Direct Purchase Order Additional Elements

```
PCHL2360 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY     05/13/2010   5:00 PM
LINK TO:                        DIRECT PURCHASE ORDER     GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                          VENDOR CHG: Y  NOTE: Y PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00      INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP     MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/13/10
ACTION IND     : N   WAREHOUSE:    BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:          50.00 REMAINING BAL:          50.00 STATUS: NOPT
VENDOR         : 1161337624 VERIZON                         EXPEDITOR  :
ADDRESS        : PO BOX 101956                              TRACK CODE :
               :                                            DATE :
         CITY: ATLANTA                    ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK                    BPO ID : 060B0400001
ADDRESS        : 45 CALVERT ST                           EXPR DATE:
                 SECOND FLOOR                             FOB POINT: DEST
         CITY: ANNAPOLIS                  ST: MD ZIP: 21401
BILL TO NAME   :                          BILL TO ADDRESS CODE:     QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET         SUBCONTR: N
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3     PERCENT
01 R00 10      10015        0808


F1-►═══► F2-ADD ELE  F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN LST
F8-QUOTE      F9-LINK  F10-SAVE   F11-SEL ACCT  F12-SEL SUB  ENTER-INQ CL-EXIT
```

Before the purchase order can be posted, the additional elements screen must be populated. This is procurement information pertaining to the way in which the contract was actually procured.

From the Purchase Order Header 2360 screen, press F2-ADD ELE to advance to the 2356 screen.

If you do not have F2-ADD ELE appearing on your header screen, press F4-OTHER to change the functionality of your function keys.

DoIT Training Department

Direct Purchase Order Additional Elements - continued


```
PCHL2356 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/13/2010  5:06 PM
LINK TO:               PURCHASE ORDER ADDITIONAL ELEMENTS


PURCHASE ORDER ID :  R00P0400022          AMOUNT :        50.00
VENDOR NO        :  1161337624     VERIZON

LOCATION         :                          SBR :
PROCUREMENT METHODS :  R
CATEGORY OF WORK   :  ITS      NON VISUAL ACCESS  : N
AWARD AUTHORITY    :  DIT      HIRING SERVICES    : N
MBE WAIVER: N   MBE WAIVER %:   0.00   MBE GOAL %:   0.00
RECYCLED CONTENT-PRE:    POST:      COMMITMENT $:       0.00
DESC: MAC


NUMBER OF SOLICITATIONS        NUMBER OF BIDS
TOT:    SB:    MBE:         TOT: 000 SB: 000 MBE: 000
PREFERENCES
RECYCLED:   SB:  REV PROD:  ENERGY SAV:   SUI:   CSW:   BUI:


F1-HELP    F5-NEXT      F9-LINK     F10-SAVE      ENTER-INQ   CL-EXIT
RECORD SAVED
```

NOTE: The above Additional Elements 2356 Screen is an example of the correct information that needs to be filled out when you create either a PO or a DPO.

1. Procurement Method = R (Release)

2. Category of Work = ITS (Information Technology Services)

3. Non Visual Access = N (No)

4. Award Authority = DIT (Department of Information Technology)

5. Hiring Services = N (No)

6. Description

Press F10-SAVE when the ADDITIONAL ELEMENTS SCREEN has been completed.

Press Escape to return back to the Purchase Order/Contract Header screen.

Purchase Order Posting

```
PCHL2360 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    06/15/2010   7:43 PM
LINK TO:                       DIRECT PURCHASE ORDER    GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NEOP                       VENDOR CHG: Y  NOTE: Y PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00     INTF TYPE : DP   CREATE: 06/15/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 06/15/10
ACTION IND     : P    WAREHOUSE:     BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:         120.00 REMAINING BAL:       120.00 STATUS: NOPT
VENDOR         : 1161337624 VERIZON                         EXPEDITOR  :
ADDRESS        : PO BOX 101956                              TRACK CODE :
               :                                            DATE :
         CITY: ATLANTA                   ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK               BPO ID : 060B0400001
ADDRESS        : 45 CALVERT ST                      EXPR DATE:
                 SECOND FLOOR                       FOB POINT: DEST
         CITY: ANNAPOLIS                   ST: MD ZIP: 21401
BILL TO NAME   :                          BILL TO ADDRESS CODE:     QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET         SUBCONTR: N
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT
01 R00 10      10015       0808


F1-HELP  F2-COPY    F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE  11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
```

Your document is now ready to Post, or place into the Approval path depending on your Agency. A good habit to get into before posting is to check the F6-VW DOC, F8-SEL TERMS and F11-VW ACCT. This is a way of verifying the information you are requesting to order is accurate and the accounting information you are using is correct.

After you have double checked these areas, tab to the ACTION IND and type over the N with the letter P for Post and press F10-SAVE.

DoIT Training Department

Purchase Order Tracking

```
PCHL2340 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010    9:40 AM
LINK TO:                      PURCHASE ORDER/CONTRACT
PRINTER ID: NE0P           PRINT SWITCH: R (R/C)   GRAPHICAL PRINT: Y (Y/N)
PO/CONTRACT ID  : R00P0400017   BLANKET PO ID : 060B0400001    CALL NO:
PURCHASING TYPE : PO   REQUISITION ID: R00R0400005   LINE : 000  BUYER: RB13
ACTION INDICATOR: A      D ID   :            AWARD:      VEND CHG: Y
CONTRACT AMOUNT :        50.00 INTERFACE TYPE: PO      EFF DATE : 05/06/2010
REMAINING VALUE :        50.00 MATCH TYPE   : AB    WAREHOUSE :
VENDOR ID       : 1161337624   DEPARTMENT   : R00      STATUS : APPR
VENDOR NAME     : VERIZON                             CREATE : 05/07/10
ADDRESS         : PO BOX 101956                       UPDATE : 05/12/10
                                                      POST   :
            CITY: ATLANTA              ST: GA ZIP: 30392
DELIVER TO NAME : TRAINING DEPARTMENT
ADDRESS         : 45 CALVERT ST
                  SECOND FLOOR
            CITY: ANNAPOLIS            ST: MD ZIP: 21401
BILL TO NAME    :                BILL TO ADDRESS CODE:
DELIVERY DATE   : 05/20/2010 F.O.B. POINT  : DEST       SUBCONTRACTOR: N
EXPIRATION DATE : 05/05/2020 DISCOUNT TERMS: NET        NOTE PAD   : Y
TRACK DATE:           FILTER IND:   EXPEDITOR:          TRACK CODE :
F1-HELP  F2-ADD ELE  F3-DELETE F4-OTHER KEYS F5-NEXT    F6-VIEW DOC F7-SEL VEN
F8-SEL TERMS F9-LINK F10-SAVE  F11-VIEW ACCT F12-PRINT    ENTER-INQUIRE CL-EXIT
PURCHASE ORDER IS SUBMITTED FOR APPROVAL PROCESSING
```

Regardless if you choose to create a Direct Purchase Order or a Purchase Order, the tracking of your PO is the same.

Your TSR document will be going through your Agency's approval path and then moving to the DoIT commodity approval path. You will need to monitor your document so you know when it has been final approved (posted). Once final approved, your Agency can print the purchase order and send to the specified vendor. Refer to the DoIT website for specific contact information for the TSR vendors.

DoIT Training Department

Direct Purchase Order Tracking - continued

```
PCHL9220 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   05/12/2010  10:20 AM
LINK TO:              DOCUMENT AUTHORIZATION TRACKING - ACTIVE    PAGE  01 OF 01

DOCUMENT ID :  R00P0400017                    NOTEPAD :  Y

                                                 APRV   ACTIVITY    DAYS
        DEPT            USER             LEVEL CHNG STAT   DATE      OUT
    1  R00    SUSAN RUTHERFORD            999   N  INIT   05/12/10

    2           LEV- 050                        N                      6
    3  R00L000  LEV- 100                        N
    4  R00LXXX  LEV- 100                        N
    5  R00AXXX  LEV- 125                        N
    6  060T1    LEV- 100                        N




    F1-HELP           F5-NEXT         F7-PRIOR PAGE          F8-NEXT PAGE
    F9-LINK           F11-NOTE PAD    ENTER-INQUIRE          CL-EXIT
    INQUIRY SUCCESSFUL
```

The ADPICS 9220 Document Authorization Tracking – Active screen will display the exact location your document is residing. This screen displays how many days the document has been in each mailbox.

DoIT will be the last stop, or final approval for the document.

```
PCHL2455 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   05/12/2010   3:03 PM
LINK TO:              PURCHASE ORDERS BY DEPARTMENT

DEPARTMENT : R00        TRAINING DEPARTMENT
FROM DATE  : 04/12/2010   TO DATE   : 05/12/2010   CREATE/DELIVERY IND: C


    S      PO ID      TYPE   CREATE DATE   STATUS   CONTRACT AMOUNT
        R00P0400017   PO     05/07/10      POST              50.00
```

You can also monitor your purchase order to see when it has posed by using the 2455 Purchase Orders By Department screen.

Enter the department that was used to create your Purchase Order in the Department Field.

The date range defaults to the past 30 days. You can change this if you choose.

Press Enter to inquire on all the purchase orders in the specified department created within the designated date range.

If the Purchase Order has been posted, it will be displayed as POST under the STATUS column.

DoIT Training Department

Direct Purchase Order Rejected Back to Agency

```
PCHL0000 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    05/12/2010   3:47 PM
LINK TO:                          MAIN MENU


                         COPYRIGHT 1994 KPMG PEAT MARWICK LLP

                   USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                      (1)  - ACCOUNTS PAYABLE MENU
                      (2)  - PROCUREMENT TRANSACTIONS MENU
                      (3)  - RECEIVING MENU
                      (4)  - INVENTORY TRANSACTIONS MENU
                      (5)  - TABLE MAINTENANCE MENU
                      (6)  - REPORT PROCESSING MENU
                      (7)  - SYSTEMS MANAGEMENT MENU
                      (8)  - CHANGE ORDER PROCESSING MENU

                      (10) - DOCUMENT AUTHORIZATION MENU
                      (11) - COMMODITY TABLE INQUIRY
                      (12) - VENDOR TABLE INQUIRY
                      (CL) - EXIT


 DOCUMENTS HAVE BEEN RETURNED TO YOUR MAILBOX : PLEASE VIEW PCHL9212
```

Occasionally a document will be rejected back to the agency. If a document has been rejected, it will appear on your ADPICS Main Menu page at the bottom of the screen. The message also notifies you of the page to link to.

NOTE:

All documents rejected by DoIT will be rejected to the initiator of the document.

DoIT Training Department

Return Notification Mailbox

```
PCHL9212 V4.1 MD UAT      ADVANCED PURCHASING/INVENTORY    05/13/2010   3:09 PM
LINK TO:                     RETURN NOTIFICATION MAILBOX           PAGE  01 OF 01


       USER ID : A60M17    SUSAN RUTHERFORD


                     DOC  DOC   CREATE  CHG  DAYS                         REJECT
    S  NTP   DOC ID   IND TYPE   DATE   IND  OUT      REASON CODE           BY
    s   Y N00P0200422  PO  DP   02/13/06       550 REJECTED TO INITIATOR  A60100










    F1-HELP            F2-SELECT          F7-PRIOR PAGE         F8-NEXT PAGE
    F9-LINK           F11-NOTE PAD        ENTER-INQUIRE         CL-EXIT
    INQUIRY SUCCESSFUL
```

From the 9212 Return Notification Mailbox screen you can select a document to view by tabbing to the document and tagging it with the letter S in the select column and pressing F2-SELECT.

DoIT Training Department

Direct Purchase Order Rejected Back to Agency Note Pad Info

```
PCHL2360 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/14/2010  10:30 AM
LINK TO: note                  DIRECT PURCHASE ORDER     GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NE0P                        VENDOR CHG: Y  NOTE: Y        SWITCH: R (R/C)
PURCHASE ORDER : R00P0400022  DEPT: R00     INTF TYPE : DP   CREATE: 05/12/10
PURCHASING TYPE: DP    MATCH TYPE: AB   EFF DATE: 05/07/2010 UPDATE: 05/13/10
ACTION IND    : N   WAREHOUSE:    BUYER: RB13 FILTER IND:    POST:
CONTRACT AMOUNT:        50.00 REMAINING BAL:        50.00 STATUS: NOPT
VENDOR        : 1161337624 VERIZON                       EXPEDITOR  :
ADDRESS       : PO BOX 101956                            TRACK CODE :
              :                                          DATE :
         CITY: ATLANTA                  ST: GA ZIP: 30392
DELIVER TO NAME: SERVICE DESK                  BPO ID : 060B0400001
ADDRESS       : 45 CALVERT ST                          EXPR DATE:
                SECOND FLOOR                           FOB POINT: DEST
          CITY: ANNAPOLIS                ST: MD ZIP: 21401
BILL TO NAME   :                         BILL TO ADDRESS CODE:     QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2010 DISC TERMS: NET         SUBCONTR: N
SF AGY YR INDEX  PCA    OBJ   AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT
01 R00 10      10015         0808



F1-HELP  F2-COPY     F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS   F9-LINK  F10-SAVE   F11-VIEW ACCT F12-PRINT    ENTER-INQ CL-EXIT
```

When documents are rejected back to the Agency, link to the NOTE PAD to find out the reason why. At the LINK TO field type in the word NOTE and press F9-LINK.

DoIT Training Department

Purchase Order Rejected – Note Pad

```
PCHL9100 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY      05/14/2010  12:01 PM
LINK TO:                     ELECTRONIC NOTE PAD               PAGE  02 OF 02

PURCHASE ORDER  2340

THIS DOCUMENT IS BEING REJECTED FOR POSSIBLY USING THE WRONG BPO,
USING THE WRONG COMMODITY INFORMATON, ETC.

IF AT ALL POSSIBLE, THE REASON FOR REJECTING A DOCUMENT SHOULD BE
ACCOMPANIED WITH ENOUGH INFORMATION FOR YOU TO FIX  YOUR DOCUMENT
AND RESUBMIT BACK INTO THE APPROVAL PROCESS.




F1-HELP     F4-AUDIT     F5-TOP        F6-COPY        F7-PR PAGE    F8-NX PAGE
F9-LINK     F10-SAVE     F11-INS PAGE  F12-DEL PAGE   ENTER-INQUIRE   CL-EXIT
```

The reason a document has been rejected should be in the Note Pad of your document.

DoIT Training Department

Resubmit Direct Purchase Order Back Into Approval Process

```
PCHL2340 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   9:40 AM
LINK TO:                    PURCHASE ORDER/CONTRACT
PRINTER ID: NE0P           PRINT SWITCH: R (R/C)   GRAPHICAL PRINT: Y (Y/N)
PO/CONTRACT ID : R00P0400017   BLANKET PO ID : 060B0400001    CALL NO:
PURCHASING TYPE : PO   REQUISITION ID: R00R0400005    LINE : 000  BUYER: RB13
ACTION INDICATOR: A    BID ID    :              AWARD:       VEND CHG: Y
CONTRACT AMOUNT :          50.00 INTERFACE TYPE: PO    EFF DATE : 05/06/2010
REMAINING VALUE :          50.00 MATCH TYPE   : AB    WAREHOUSE :
VENDOR ID      : 1161337624    DEPARTMENT   : R00       STATUS : APPR
VENDOR NAME    : VERIZON                               CREATE : 05/07/10
ADDRESS        : PO BOX 101956                         UPDATE : 05/12/10
                                                       POST   :
             CITY: ATLANTA                 ST: GA ZIP: 30392
DELIVER TO NAME : TRAINING DEPARTMENT
ADDRESS         : 45 CALVERT ST
                  SECOND FLOOR
             CITY: ANNAPOLIS               ST: MD ZIP: 21401
BILL TO NAME    :                 BILL TO ADDRESS CODE:
DELIVERY DATE   : 05/20/2010 F.O.B. POINT  : DEST      SUBCONTRACTOR: N
EXPIRATION DATE : 05/05/2020 DISCOUNT TERMS: NET       NOTE PAD   : Y
TRACK DATE:          FILTER IND:   EXPEDITOR:          TRACK CODE  :
F1-HELP  F2-ADD ELE  F3-DELETE F4-OTHER KEYS F5-NEXT    F6-VIEW DOC F7-SEL VEN
F8-SEL TERMS F9-LINK F10-SAVE  F11-VIEW ACCT F12-PRINT    ENTER-INQUIRE CL-EXIT
PURCHASE ORDER IS SUBMITTED FOR APPROVAL PROCESSING
```

After the requested changes have been made, repost your document placing it back in the approval process.

```
PCHL2455 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   5:43 PM
LINK TO:                    PURCHASE ORDERS BY DEPARTMENT

DEPARTMENT : R00          TRAINING DEPARTMENT
FROM DATE  : 04/12/2010   TO DATE   : 05/12/2010   CREATE/DELIVERY IND: C


    S      PO ID      TYPE    CREATE DATE    STATUS    CONTRACT AMOUNT
          R00P0400017  PO      05/07/10      POST              50.00
```

Track your document either on the 2455 screen or the 9230 screens.

```
PCHL9230 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/12/2010   5:45 PM
LINK TO:            DOCUMENT AUTHORIZATION TRACKING - ARCHIVE   PAGE  01 OF 01

DOCUMENT ID :  R00P0400017      NOTEPAD :  Y        CUMULATIVE DAYS :    0

                                                             APRV   DAYS
      DATE      TIME    DEPT           USER            LEVEL STAT OUT
    05/12/10   9:40AM  R00    SUSAN RUTHERFORD          999 INIT
    05/12/10  11:46AM  060T1  TRAINING ID               100 RJCT
    05/12/10  11:56AM  R00    SUSAN RUTHERFORD          999 INIT
    05/12/10  11:58AM  060T1  TRAINING ID               100 AUTH
```

Once final approved, your Agency can print the purchase order and send to the specified vendor. Refer to the DoIT website for specific contact information for the TSR vendors.

BPO CROSS-OVER FOR TSR's

Old BPO Number:	New BPO Number:	Type of BPO
060B0400001	060B1400047	PBX I
060B9800006	060B1400006	Long Distance
060B9800008	060B1400008	PBX II
060B9800034	060B1400047	PBX I
060B9800040	060B1400040	Call Center
060B9800041	no change	Local Access
060B9800046	060B1400046	Toll Free

Table of Contents –

DoIT Training Department

Purchase & Direct Purchase Order Change Orders

This User Guide will address both Purchase Orders and Direct Purchase Orders.   Going forward in this User Guide, both types of Purchase Orders will be referred to as just 'Purchase Orders' and where there are differences in processing, it will be noted.

After logging into FMIS from the ADPICS Main Menu either link to the particular Change Order Screen you want to create or press F8 – Change Order Processing Menu to advance to the 8000 Change Order Menu screen.

```
PCHL0000 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/06/2010   3:25 PM
LINK TO:                          MAIN MENU

                       COPYRIGHT 1994 KPMG PEAT MARWICK LLP

             USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                  (1)  - ACCOUNTS PAYABLE MENU
                  (2)  - PROCUREMENT TRANSACTIONS MENU
                  (3)  - RECEIVING MENU
                  (4)  - INVENTORY TRANSACTIONS MENU
                  (5)  - TABLE MAINTENANCE MENU
                  (6)  - REPORT PROCESSING MENU
                  (7)  - SYSTEMS MANAGEMENT MENU
                  (8)  - CHANGE ORDER PROCESSING MENU

                  (10) - DOCUMENT AUTHORIZATION MENU
                  (11) - COMMODITY TABLE INQUIRY
                  (12) - VENDOR TABLE INQUIRY
                  (CL) - EXIT
```

Press F2 to advance to Purchase Order – ITB Change Menu.

```
PCHL8000 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    06/19/2010   4:04 PM
LINK TO: ▪                        CHANGE ORDER MENU

                       COPYRIGHT 1994 KPMG PEAT MARWICK LLP

             USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                  (1)  - REQUISITION CHANGE MENU
                  (2)  - PURCHASE ORDER - ITB  CHANGE MENU
                  (3)  - DOCUMENT CANCELLATION
                  (4)  - SPECIFICATION/TERMS CHANGE
                  (5)  - CHANGE ORDER PRINT

                  (7)  - PURCHASE ORDER CHANGE ORDER INQUIRY




                  (CL) - EXIT
```

DoIT Training Department

Purchase Order Change Orders – Accounting Change

```
PCHL8002 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    06/19/2010   4:06 PM
LINK TO:                  PURCHASE ORDER - ITB  CHANGE MENU

                     COPYRIGHT 1994 KPMG PEAT MARWICK LLP

            USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

            (1)  - PURCHASE ORDER - ACCOUNTING CHANGE
            (2)  - PURCHASE ORDER - COMMODITY  CHANGE
            (3)  - DOCUMENT - COMMODITY ADD
            (4)  - BPO/PO AMOUNT AND DATE CHANGE
            (5)  - SUBCONTRACTOR PARTICIPATION AMOUNT CHANGE
            (6)  - INVITATION TO BID - DUE DATE CHANGE
            (7)  - PURCHASE ORDER CHANGE ORDER INQUIRY
            (8)  - BLANKET PURCHASE ORDER CHANGE ORDER

            (10) - PURCHASE ORDER VENDOR CHANGE ORDER


            (CL) - EXIT
```

From the 8002 Purchase Order – ITB Change Menu, press F1 to advance to the Purchase Order – Accounting Change 8300 screen.

Purchase Order Change Orders – Accounting Change - continued

```
HL8300 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/15/2010   2:07 PM
LINK TO:               PURCHASE ORDER ACCOUNTING CHANGE
                                                             MORE ACCTG : N
CHANGE ORDER ID  :            DOC REF : 000 DOC TYPE: 03 YEAR-END CO (Y/N): N
PURCHASE ORDER ID: r00p0400022  ACTION IND: N INTF TYP: C3 EFF DATE:
REQUISITION ID   : r00p0400022  LINE NO : 000 YEAR-END LIQ EFF DATE:
COMMODITY/PART NO:
FILTER IND:     ACCTG TOTAL:
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH PROJ/PH  AG1 AG2 AG3      AMOUNT




F1-HELP    F3-DELETE   F4-ACCTG              F5-NEXT          F8-SEL TERMS
F9-LINK    F10-SAVE    F11-CHANGE APPR YEAR  ENTER-INQUIRE    CL-EXIT
```

The Purchase Order Accounting Change screen (8300) allows the user to create a Change Order that modifies the accounting distribution of a posted Purchase Order.

DOC REF: You will always enter "000" in this field.

PURCHASE ORDER ID: Enter the purchase order ID number of the purchase order you want to change.

REQUISITION ID: Enter the ID of the requisition associated with the purchase order. **If the purchase order is a direct purchase order, enter the purchase order ID in this field.**

LINE NO: Enter the line number of the purchase order or requisition detail line associated with the purchase order you want to change.

If the accounting distribution method is "S" (single) or "P" (percentage), you will always enter "000". Three zeros "000" indicate that the accounting changes apply to the entire document.

 If the accounting distribution method is "M" (multiple), you will enter the line number assigned to the detail entry record that you want to change.

Press **F10-SAVE** to bring forward the purchase order information.

Purchase Order Change Orders – Accounting Change - continued

```
PCHL8300 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY     05/15/2010    2:21 PM
LINK TO:                  PURCHASE ORDER ACCOUNTING CHANGE
                                                                    MORE ACCTG : N
CHANGE ORDER ID  : C0000836    DOC REF : 000 DOC TYPE: 03 YEAR-END CO (Y/N): N
PURCHASE ORDER ID: R00P0400022  ACTION IND: N INTF TYP: C3 EFF DATE: 05/07/2010
REQUISITION ID   :              LINE NO : 000 YEAR-END LIQ EFF DATE:
COMMODITY/PART NO:
FILTER IND:      ACCTG TOTAL:       100.00
SF AGY YR INDEX   PCA      OBJ   AOBJ GRANT/PH PROJ/PH  AG1 AG2 AG3      AMOUNT
02 R00 10      11015      0808                                          100.00
02 R00 10      10015      0808                                          100.00




F1-HELP    F3-DELETE    F4-ACCTG               F5-NEXT           F8-SEL TERMS
F9-LINK    F10-SAVE     F11-CHANGE APPR YEAR   ENTER-INQUIRE     CL-EXIT
ACCTG RETRIEVED FOR PO REQUISITION LINE, READY FOR UPDATE                  ■
```

Once your doucment is saved, a Change Order ID is assigned to your document. The system brings forward all the accounting information from the original Purchase Order.

Make your appropriate accounting change and press **F10-SAVE** to save your changes

NOTE:

The screen displays the purchase order accounting lines that were entered for the requisition or direct purchase order. Notice that each accounting line is repeated. If you press **Tab** to move through the screen, you will notice that the first time the accounting line is displayed the information is protected. Changes are made on the second line displayed. This enables you to easily see what changes were made.

Notice the **MORE ACCTG** field in the upper right corner of the screen. If this field displays "Y" (yes), the accounting distribution method is "M" (multiple) and more than six accounting lines have been entered for this requisition detail entry.

If the **MORE ACCTG** field displays "Y", press **F4-ACCTG** to view the additional accounting information. When F4-ACCTG is pressed, the system transfers to the Accounting Change Order Accounting Detail (8301) screen.

Notice that the suffix of the changed accounting line changed to "**02**" when the change request was saved. Whenever you change the accounting distribution, the system assigns the next sequential suffix. This enables the system to liquidate the encumbrance established by suffix "01", and create a new encumbrance for suffix "02".

Purchase Order Change Orders – Accounting Change - continued

```
PCHL8300 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      05/15/2010    2:24 PM
LINK TO:                  PURCHASE ORDER ACCOUNTING CHANGE
                                                              MORE ACCTG : N
CHANGE ORDER ID   : C0000836     DOC REF : 000 DOC TYPE: 03 YEAR-END CO (Y/N): N
PURCHASE ORDER ID: R00P0400022   ACTION IND: P        TYP: C3 EFF DATE: 05/07/2010
REQUISITION ID    :              LINE NO : 000 YEAR-END LIQ EFF DATE:
COMMODITY/PART NO:
FILTER IND:       ACCTG TOTAL:        100.00
SF AGY YR INDEX   PCA    OBJ    AOBJ GRANT/PH PROJ/PH  AGI AG2 AG3     AMOUNT
02 R00 10         11015         0808                                   100.00
01 R00 10         10015         0808                                   100.00




F1-HELP      F3-DELETE    F4-ACCTG              F5-NEXT           F8-SEL TERMS
F9-LINK      F10-SAVE     F11-CHANGE APPR YEAR  ENTER-INQUIRE     CL-EXIT
CHANGE ORDER POSTED
```

Once your changes have been made, change the Action IND to P for Post and press F10-SAVE.

NOTE:
        Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path. DoIT will not have to approve accounting change orders.

Purchase Order Change Orders – Commodity Change

```
PCHL8002 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    06/19/2010   4:06 PM
LINK TO:                PURCHASE ORDER - ITB  CHANGE MENU


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             USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:


              (1)  - PURCHASE ORDER - ACCOUNTING CHANGE
              (2)  - PURCHASE ORDER - COMMODITY  CHANGE
              (3)  - DOCUMENT - COMMODITY ADD
              (4)  - BPO/PO AMOUNT AND DATE CHANGE
              (5)  - SUBCONTRACTOR PARTICIPATION AMOUNT CHANGE
              (6)  - INVITATION TO BID - DUE DATE CHANGE
              (7)  - PURCHASE ORDER CHANGE ORDER INQUIRY
              (8)  - BLANKET PURCHASE ORDER CHANGE ORDER

              (10) - PURCHASE ORDER VENDOR CHANGE ORDER



              (CL) - EXIT
```

From the 8002 Purchase Order – ITB Change Menu, press F2 to advance to the Purchase Order – Commodity Change 8400 screen.

Purchase Order Change Orders – Commodity Change - continued

```
PCHL8400 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/15/2010    1:16 PM
LINK TO:              PURCHASE ORDER COMMODITY CHANGE

CHANGE ORDER ID  :              DOC REF: 000 DOC TYPE  : 04 ACTION IND: N
PURCHASE ORDER ID: r00p0400022    FILTER IND:    EFF DATE:
REQUISITION ID   : r00p0400022   LINE NO: 001      TYPE : C4
                    OLD                     NEW
COMMODITY ID:
PART NO    :
QUANTITY   :             0.00                    0.00
UNIT COST  :
STATE TAX  :        LOCAL TAX :
DISCOUNT   :            SIZE:                   MORE ACCOUNTING:  N
EST. TOTAL :
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH PROJ/PH   OLD AMOUNT    NEW AMOUNT




F1-HELP        F2-SEL COM     F3-DELETE    F4-ACCTG    F5-NEXT      F7-SEL PART
F8-SEL TERMS   F9-LINK        F10-SAVE     ENTER-INQUIRE           CL-EXIT
```

The Purchase Order Commodity Change screen is used to change the commodity information originally entered on the Purchase Order Detail Entry screens.

DOC REF: You will always enter "000" in this field.

PURCHASE ORDER ID: Enter the ID number of the purchase order you want to change.

REQUISITION ID: Enter the ID of the requisition associated with the purchase order. **If the purchase order is a direct purchase order, enter the purchase order ID in this field.**

LINE NO: Enter the line number of the purchase order or requisition detail line associated with the purchase order you want to change.

Press **F10-SAVE** to bring forward the purchase order information.

Purchase Order Change Orders – Commodity Change - continued

```
PCHL8400 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/15/2010   1:23 PM
LINK TO:               PURCHASE ORDER COMMODITY CHANGE

CHANGE ORDER ID  : C0000835      DOC REF: 000 DOC TYPE  : 04 ACTION IND: N
PURCHASE ORDER ID: R00P0400022    FILTER IND:     EFF DATE: 05/07/2010
REQUISITION ID   : R00P0400022  LINE NO: 001 INTF TYPE : C4
                       OLD                      NEW
COMMODITY ID:   99789-PBX102     0002  99789-PBX102     0002
PART NO   :
QUANTITY  :              1.00                    1.00
UNIT COST :           50.0000              100.00
STATE TAX :       LOCAL TAX :
DISCOUNT  :             SIZE: EA              EA    MORE ACCOUNTING:  N
EST. TOTAL :           50.00               50.00
SF AGY YR INDEX  PCA    OBJ   AOBJ GRANT/PH PROJ/PH   OLD AMOUNT    NEW AMOUNT
02 R00 10       11015        0808                        50.00

F1-HELP        F2-SEL COM     F3-DELETE     F4-ACCTG   F5-NEXT      F7-SEL PART
F8-SEL TERMS   F9-LINK        F10-SAVE      ENTER-INQUIRE           CL-EXIT
CHANGE ORDER RECORD DISPLAYED, READY FOR UPDATE.
```

Once your doucment is saved, a Change Order ID is assigned to your document. The system brings forward all the commodity information from the original Purchase Order.

NOTE: Commodity ID, Quantity, Order Size and Unit Cost can be changed for any line on the purchase order. **For AB match type – Progressive Payment – the quantity must remain as 1.**

You can cancel an existing purchase order detail entry using this screen. However, if you want to add a line to a posted purchase order, access the Document Change Order Commodity Add (8450) screen.

If the accounting distribution method associated with the purchase order is "M" (multiple), the amount allocated to each existing accounting distribution line can also be changed using this screen.

To change the commodity information on this screen, type over any displayed information that is not protected. This information is located under the **NEW** or right side of the screen. If necessary, a new amount should be entered to reflect the change. Press **F10** to Save.

Purchase Order Change Orders – Commodity Change - continued

```
PCHL8400 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY      05/15/2010    1:25 PM
LINK TO:                 PURCHASE ORDER COMMODITY CHANGE

CHANGE ORDER ID  : CO000835      DOC REF: 000 DOC TYPE  : 04 ACTION IND: N
PURCHASE ORDER ID: R00P0400022     FILTER IND:     EFF DATE: 05/07/2010
REQUISITION ID   : R00P0400022  LINE NO: 001 INTF TYPE : C4
                         OLD                       NEW
COMMODITY ID:    99789-PBX102     0002  99789-PBX102      0002
PART NO     :
QUANTITY    :                 1.00                    1.00
UNIT COST   :            50.0000                  100.00
STATE TAX   :       LOCAL TAX :
DISCOUNT    :               SIZE: EA              EA     MORE ACCOUNTING:  N
EST. TOTAL  :            50.00                  100.00
SF AGY YR INDEX   PCA    OBJ   AOBJ GRANT/PH PROJ/PH   OLD AMOUNT    NEW AMOUNT
02 R00 10        11015       0808                        50.00    100.00■

F1-HELP        F2-SEL COM     F3-DELETE      F4-ACCTG    F5-NEXT      F7-SEL PART
F8-SEL TERMS   F9-LINK        F10-SAVE       ENTER-INQUIRE            CL-EXIT
NEW AMOUNT NOT NUMERIC
```

If you forget to enter in the new amount, the system will prompt you. Once amount is entered, press **F10-SAVE** to save your change order.

```
PCHL8400 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY      05/15/2010    1:28 PM
LINK TO:                 PURCHASE ORDER COMMODITY CHANGE

CHANGE ORDER ID  : CO000835      DOC REF: 000 DOC TYPE  : 04 ACTION IND: N
PURCHASE ORDER ID: R00P0400022     FILTER IND:     EFF DATE: 05/07/2010
REQUISITION ID   : R00P0400022  LINE NO: 001 INTF TYPE : C4
                         OLD                       NEW
COMMODITY ID:    99789-PBX102     0002  99789-PBX102      0002
PART NO     :
QUANTITY    :                 1.00                    1.00
UNIT COST   :            50.0000                  100.0000
STATE TAX   :       LOCAL TAX :
DISCOUNT    :               SIZE: EA              EA     MORE ACCOUNTING:  N
EST. TOTAL  :            50.00                  100.00
SF AGY YR INDEX   PCA    OBJ   AOBJ GRANT/PH PROJ/PH   OLD AMOUNT    NEW AMOUNT
02 R00 10        11015       0808                        50.00        100.00

F1-HELP        F2-SEL COM     F3-DELETE      F4-ACCTG    F5-NEXT      F7-SEL PART
F8-SEL TERMS   F9-LINK        F10-SAVE       ENTER-INQUIRE            CL-EXIT
RECORD ALREADY EXISTS ON FILE, PRESS <PF10> TO REPLACE
```

Note the message at the bottom of the screen. Press **F10-SAVE** again to replace and save your change order.

DoIT Training Department

Purchase Order Change Orders – Commodity Change - continued

```
PCHL8400 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY     05/15/2010     1:54 PM
LINK TO:                 PURCHASE ORDER COMMODITY CHANGE

CHANGE ORDER ID  : C0000835     DOC REF: 000 DOC TYPE  : 04 ACTION IND: A
PURCHASE ORDER ID: R00P0400022     FILTER IND:     EFF DATE: 05/07/2010
REQUISITION ID   : R00P0400022 LINE NO: 001 INTF TYPE : C4
                     OLD                       NEW
COMMODITY ID:   99789-PBX102     0002  99789-PBX102       0002
PART NO    :
QUANTITY   :              1.00                    1.00
UNIT COST  :           50.0000               100.0000
STATE TAX  :       LOCAL TAX :
DISCOUNT   :             SIZE: EA              EA     MORE ACCOUNTING:   N
EST. TOTAL :           50.00                 100.00
SF AGY YR INDEX   PCA    OBJ   AOBJ GRANT/PH PROJ/PH   OLD AMOUNT    NEW AMOUNT
02 R00 10       11015        0808                         50.00        100.00




F1-HELP        F2-SEL COM     F3-DELETE     F4-ACCTG    F5-NEXT      F7-SEL PART
F8-SEL TERMS   F9-LINK        F10-SAVE      ENTER-INQUIRE            CL-EXIT
CHANGE ORDER SUBMITTED FOR APPROVAL PROCESSING
```

Once your changes have been made, change the Action IND to P for Post and press F10-SAVE.

Your change order will be going through your Agency's approval path and then moving to the DoIT commodity approval path.

NOTE:

Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path and the DoIT commodity approval path. DoIT will be the final poster of your document.

Purchase Order Change Orders – Commodity Add

```
PCHL8002 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    06/19/2010   4:06 PM
LINK TO:                 PURCHASE ORDER - ITB  CHANGE MENU

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              USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                  (1)  - PURCHASE ORDER - ACCOUNTING CHANGE
                  (2)  - PURCHASE ORDER - COMMODITY  CHANGE
                  (3)  - DOCUMENT - COMMODITY ADD
                  (4)  - BPO/PO AMOUNT AND DATE CHANGE
                  (5)  - SUBCONTRACTOR PARTICIPATION AMOUNT CHANGE
                  (6)  - INVITATION TO BID - DUE DATE CHANGE
                  (7)  - PURCHASE ORDER CHANGE ORDER INQUIRY
                  (8)  - BLANKET PURCHASE ORDER CHANGE ORDER

                  (10) - PURCHASE ORDER VENDOR CHANGE ORDER


                  (CL) - EXIT
```

From the 8002 Purchase Order – ITB Change Menu, press F1 to advance to the Document – Commodity Add 8450 screen.

Purchase Order Change Orders – Commodity Add

```
PCHL8450 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY     05/15/2010    2:31 PM
LINK TO:            DOCUMENT CHANGE ORDER COMMODITY ADD HEADER


        CHANGE ORDER ID       :                DOC TYPE:

        DOCUMENT ID           : r00p0400022    NOTE PAD: N

        DOCUMENT INDICATOR    : poc            EFF DATE:
        (REQ/POC)

        DOCUMENT REFERENCE NO :                FILTER IND:

        DOC REF               : 000            STATUS  :
                                               CREATE  :
        ACTION IND            : N              UPDATE  :
                                               POST    :
        INTERFACE TYPE        :


F1-HELP            F3-DELETE              F5-NEXT            F6-VIEW DOC
F9-LINK    F10-SAVE   F11-VIEW ACCTNG      ENTER-INQUIRE      CL-EXIT
```

The Document Change Order Commodity Add Header (8450) screen is used to add another detail line to posted Requisitions or posted Purchase Orders.

DOCUMENT ID: Enter the document id that corresponds with the Purchase Order you want to add a line to.

DOCUMENT INDICATOR: Enter the document type you want to add a line to: REQ (Requisition) or POC (Purchase Order).

DOC REF: You will always enter "000" in this field.

Press **F10-SAVE** to save the information and transfer to the Document Change Order Commodity Add Detail (8455) **accounting** screen.

Purchase Order Change Orders – Commodity Add - continued

```
PCHL8455 V4.1              ADVANCED PURCHASING/INVENTORY    05/15/2010   2:44 PM
LINK TO:          DOCUMENT CHANGE ORDER COMMODITY ADD DETAIL

CHANGE ORDER ID  : C0000838    LINE NO      : 001       BUYER: RB13
PURCHASE ORDER ID: R00P0400022  REQUISITION ID:
COMMODITY   :                                           BPO LINE NO:
PART NO     :
QUANTITY    :                  STATE TAX :       LOCAL TAX :
PURCHASE U/M:    UNIT COST:              EST. TOTAL COST:        0.00
ACCOUNTING INFORMATION-
SF AGY YR INDEX  PCA   OBJ   AOBJ GRANT/PH PROJ/PH  AG1 AG2 AG3     AMOUNT
01 R00 10        10015       0808




   MORE ACCOUNTING: N    CURRENT DETAIL ACCOUNTING AMOUNT:



F1-H    F2-SEL COMM  F3-DELETE  F4-ACCTG  F5-NEXT  F6-VIEW DOC  F7-SEL PART
F9-LINK  F10-SAVE  F11-VIEW ACCTING    F12-VIEW SPECS    TER-INQUIRE   CL-EXIT
PLEASE ENTER DETAILS FOR CHANGE ORDER LINE
```

To add a commodity to this change order press F2-SEL COMM.

NOTE: Entering data on this screen is very similar to entering data onto a requisition or direct purchase order when the multiple distribution method is used. Screen 8455 has two screen formats that you will use. Initially, you are transferred to the accounting format where the accounting information is entered. Once you enter the required information, you are transferred to the specification format where you can enter specification data. The **F12** key allows you to toggle between the two formats.

.

Purchase Order Change Orders – Commodity Add - continued


```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    05/15/2010   2:59 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : 060B0400001     REMAINING VALUE:       200.00 ALL:   I/D:
VENDOR ID   : 1161337624  VERIZON
MULT VENDORS: N (Y/N)          F/P:     AMOUNT:                 PCT:
S COMMODITY ID      LINE ORIG-LINE QTY AVLBL        UNIT COST    TOTAL AVAIL
  COMMODITY DESCRIPTION
  99789-PBX101      0001
  TSR PBX I VERIZON TELEPHONE SWITCH
  99789-PBX102      0002
  TSR PBX I VERIZON TELEPHONE MOVES ADDS CHANGES
s 99789-PBX103      0003
  TSR PBX I VERIZON VOICEMAIL
  99789-PBX104      0004
  TSR PBX I VERIZON CABLING INSIDE
  99789-PBX105      0005
  TSR PBX I VERIZON PERIPHERALS-ACD, IVR, ETC.
  99789-PBX106      0006
  TSR PBX I VERIZON OTHER MISC SERVICES RELATED TO PBXI STATEWIDE CONTRAC

F1-HELP  F2-SELECT   F3-DELETE  F4-TEXT  F5-NEXT      F6-RETURN       RIOR PAGE
F8-NEXT PAGE  F9-LINK F10-SAVE F11-TOGGLE  F12-VIEW VEN  ENTER-INQUIRE  CL-EXIT
INQUIRY SUCCESSFUL
```

The system takes you to the Blanket Purchase Order Detail screen of the BPO you are ordering from. Locate a commodity that you want to add to your purchase order. If the commodity you are looking for is not displayed on the screen, use the **F8-NEXT** and **F7-PRIOR** function keys to scroll through the pages.

NOTE:

Be sure that the screen shows 2348 Blanket Purchase Order Details screen. If it does not, chances are you have entered the wrong Purchase Order number. If you have questions, contact the Service Desk.

When you locate the commodity you want to request, press **Tab** until the cursor is positioned to the left of the commodity name.

Type an **"S"** next to the commodity name to select it.

Press **F6-RETURN** to transfer the selected commodity to the Commodity Add Detail (8455) accounting screen.

Purchase Order Change Orders – Commodity Add - continued

```
PCHL8455 V4.1              ADVANCED PURCHASING/INVENTORY      05/15/2010    3:18 PM
LINK TO:           DOCUMENT CHANGE ORDER COMMODITY ADD DETAIL

CHANGE ORDER ID  : C0000838      LINE NO      : 001      BUYER: RB13
PURCHASE ORDER ID: R00P0400022   REQUISITION ID:
COMMODITY   : 99789-PBX103          VOICE MAIL PBX1              BPO LINE NO: 0003
PART NO     :
QUANTITY    : 1               STATE TAX :         LOCAL TAX :
PURCHASE U/M: EA   UNIT COST: 20.00              EST. TOTAL COST:        20.00
ACCOUNTING INFORMATION-
SF AGY YR INDEX  PCA   OBJ    AOBJ GRANT/PH PROJ/PH  AG1 AG2 AG3       AMOUNT
01 R00 10      10015        0808



    MORE ACCOUNTING: N    CURRENT DETAIL ACCOUNTING AMOUNT:



   F1-HELP  F2-SEL COMM  F3-DELETE  F4-ACCTG  F5-NEXT  F6-VIEW DOC  F7-SEL PART
   F9-LINK  F10-SAVE      11-VIEW ACCTING    F12-VIEW SPECS   ENTER-INQUIRE   CL-EXIT
NO AMOUNT CORRESPONDING TO ACCTG INFO, RECORD NOT UPDATED
```

The commodity you choose is returned back to your change order document. You will need to enter the quantity, purchase U/M and unit cost.

NOTE:

AMOUNT: Enter the amount for each line of accounting. The total for all lines must equal the EST. TOTAL COST or the Change Order will not post. You will receive the above error message if you do not have the amount filled in on the accounting line.

Press **F10-SAVE** to save the commodity information to your change order.

Purchase Order Change Orders – Commodity Add - continued

```
PCHL8455 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/15/2010   3:24 PM
LINK TO:          DOCUMENT CHANGE ORDER COMMODITY ADD DETAIL
CHANGE ORDER ID  : C0000838      LINE NO        : 001        BUYER: RB13
PURCHASE ORDER ID: R00P0400022   REQUISITION ID:
COMMODITY     : 99789-PBX103          VOICE MAIL PBX1          BPO LINE NO: 0003
PART NO       :
QUANTITY      :          1.00    STATE TAX :        LOCAL TAX :
PURCHASE U/M  : EA   UNIT COST:       20.0000 EST. TOTAL COST:        20.00
SPEC ID       :
BLOCK FUNCTION:      (SPEC ID TO COPY, ISRT, DLET, DUP)
         SPECIFICATION INFO                         BLOCK 001 OF 001
    Need voice mail set up for extension 2233.  Employee's name is
    Donald Duck




F1-HELP F2-SEL COMM  F3-DELETE  F4-OTHER  F5-NEXT  F6-VIEW DOC  F7-PRIOR BLK
F8-NEXT BLK  F9-LINK  F10-SAVE  F11-VW ACCT  F12-LN ACCT  ENTER-INQ  CL-EXIT
```

Once **F10-SAVE** is pressed, the system transfers you to the specification side of the screen. Enter the specification information for this commodity and press **F10-SAVE** to save the information to your change order.

NOTE:
Entering data on this screen is very similar to entering data onto a requisition or direct purchase order when the multiple distribution method is used. Screen 8455 has two screen formats that you will use. Initially, you are transferred to the accounting format where the accounting information is entered. Once you enter the required information, you are transferred to the specification format where you can enter specification data. The F12 key allows you to toggle between the two formats.

Purchase Order Change Orders – Commodity Add - continued

```
PCHL8455 V4.1              ADVANCED PURCHASING/INVENTORY    05/15/2010   3:27 PM
LINK TO:          DOCUMENT CHANGE ORDER COMMODITY ADD DETAIL

CHANGE ORDER ID  : CO000838      LINE NO      : 002         BUYER: RB13
PURCHASE ORDER ID: R00P0400022   REQUISITION ID:
COMMODITY    :                                          BPO LINE NO:
PART NO      :
QUANTITY     :                   STATE TAX :        LOCAL TAX :
PURCHASE U/M:      UNIT COST:                  EST. TOTAL COST:         0.00
ACCOUNTING INFORMATION-
SF AGY YR INDEX   PCA    OBJ    AOBJ GRANT/PH PROJ/PH   AG1 AG2 AG3      AMOUNT




   MORE ACCOUNTING: N    CURRENT DETAIL ACCOUNTING AMOUNT:



F1-HELP   F2-SEL COMM  F3-DELETE  F4-ACCTG  F5-NEXT  F6-VIEW DOC  F7-SEL PART
F9-LINK   F10-SAVE  F11-VIEW ACCTING    F12-VIEW SPECS    ENTER-INQUIRE    CL-EXIT
RECORD SAVED
```

When **F10-SAVE** is pressed the system automatically transfers you to a new screen allow for additional commodities to be added. Press the ESCAPE or CL-EXIT key if there are no additional commodities to add.

Purchase Order Change Orders – Commodity Add – continued

```
PCHL8450 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/15/2010    3:40 PM
LINK TO:          DOCUMENT CHANGE ORDER COMMODITY ADD HEADER


         CHANGE ORDER ID          : CO000838        DOC TYPE: PO

         DOCUMENT ID              : R00P0400022     NOTE PAD: N

         DOCUMENT INDICATOR       : POC             EFF DATE: 05/07/2010
         (REQ/POC)

         DOCUMENT REFERENCE NO    :                 FILTER IND:

         DOC REF                  : 000             STATUS  : NOPT
                                                    CREATE  : 05/15/10
         ACTION IND               : P               UPDATE  : 05/15/10
                                                    POST    :
         INTERFACE TYPE           : C3



F1-HELP            F3-DELETE                F5-NEXT              F6-VIEW DOC
F9-LINK    F10-SAVE      11-VIEW ACCTNG     ENTER-INQUIRE          CL-EXIT
INQUIRY SUCCESSFUL
```

The system returns you to the 8450 screen. Tab to the ACTION IND and type over the N with the letter P for Post and press **F10-SAVE**.

Purchase Order Change Orders – Commodity Add – continued

```
PCHL8450 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY     05/15/2010     3:42 PM
LINK TO:          DOCUMENT CHANGE ORDER COMMODITY ADD HEADER


          CHANGE ORDER ID         : C0000838          DOC TYPE: PO

          DOCUMENT ID             : R00P0400022       NOTE PAD: N

          DOCUMENT INDICATOR      : POC               EFF DATE: 05/07/2010
          (REQ/POC)

          DOCUMENT REFERENCE NO   :                   FILTER IND:

          DOC REF                 : 000               STATUS  : POST
                                                      CREATE  : 05/15/10
          ACTION IND              :   A               UPDATE  : 05/15/10
                                                      POST    : 05/15/10
          INTERFACE TYPE          : C3



F1-HELP              F3-DELETE                 F5-NEXT                F6-VIEW DOC
F9-LINK     F10-SAVE    F11-VIEW ACCTNG        ENTER-INQUIRE          CL-EXIT
CHANGE ORDER POSTED
```

NOTE: Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path and the DoIT commodity approval path. DoIT will be the final poster of your document.

Purchase Order Change Orders – Document Cancellation

```
PCHL8000 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    06/19/2010   4:04 PM
LINK TO: ▪                      CHANGE ORDER MENU

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            USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

                (1)  - REQUISITION CHANGE MENU
                (2)  - PURCHASE ORDER - ITB  CHANGE MENU
                (3)  - DOCUMENT CANCELLATION
                (4)  - SPECIFICATION/TERMS CHANGE
                (5)  - CHANGE ORDER PRINT

                (7)  - PURCHASE ORDER CHANGE ORDER INQUIRY




                (CL) - EXIT
```

From the 8000 Change Order Menu, press F3 to advance to the Document Cancellation 8500 screen.

Purchase Order Change Orders – Document Cancellation – continued

```
PCHL8500 V4.1 MD TRN     ADVANCED PURCHASING/INVENTORY    05/19/2010   1:32 PM
LINK TO:                        DOCUMENT CANCELLATION



        CHANGE ORDER ID        : CO000841      DOCUMENT TYPE: 05

        DOCUMENT ID            : R00P0400034    EFF DATE: 05/18/2010

        DOCUMENT INDICATOR     : POC            FILTER IND:
        (REQ/POC/CPO/BPO/VCH/REC/ITB/BID/BD1/IVC/DVC)

        DOC REF                : 000

        ACTION IND             : N

        INTERFACE TYPE         : C5

        CANCEL ASSOCIATED REQ  : N (Y OR N, BLANK DEFAULTS TO N)
        (USED FOR POC FROM BID ONLY)


F1-HELP        F3-DELETE       F5-NEXT          F8-SEL TERMS
F9-LINK        F10-SAVE        ENTER-INQUIRE    CL-EXIT
CANCELLATION REQUEST SAVED
```

The Document Cancellation (8500) screen is used to cancel posted documents. This screen cancels a posted requisitions, solicitations, bids, purchase orders, invoices, receiving reports or vouchers.

When a document is canceled, all accounting related to the document is liquidated. For example, if you cancel a posted purchase order, the system will liquidate the encumbrance created by that purchase order.

DOCUMENT ID: Enter the ID of the document you want to cancel

DOCUMENT INDICATOR: Enter the indicator that defines the type of document you are canceling.

DOC REF: Enter "000" in this field.

Press **F10-SAVE** to save the information.

Purchase Order Change Orders – Document Cancellation - continued

```
PCHL8500 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    05/19/2010   1:36 PM
LINK TO:                      DOCUMENT CANCELLATION



        CHANGE ORDER ID        : CO000841       DOCUMENT TYPE: 05

        DOCUMENT ID            : R00P0400034    EFF DATE: 05/18/2010

        DOCUMENT INDICATOR     : POC            FILTER IND:
        (REQ/POC/CPO/BPO/VCH/REC/ITB/BID/BD1/IVC/DVC)

        DOC REF                : 000

        ACTION IND             : P

        INTERFACE TYPE         : C5

        CANCEL ASSOCIATED REQ  : N (Y OR N, BLANK DEFAULTS TO N)
        (USED FOR POC FROM BID ONLY)

F1-HELP      F3-DELETE      F5-NEXT          F8-SEL TERMS
F9-LINK      F10-SAVE       ENTER-INQUIRE    CL-EXIT
CHANGE ORDER POSTED
```

NOTE: Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path and the DoIT commodity approval path. DoIT will be the final poster of your document.