

LAST REVISED DATE: 09/13/2019

General Information

Task	Process Information
<p>Creating a Change Order for an Express Purchase Order</p> <p>Note: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>When you update an Express PO that has been dispatched, you create or append a change order in GEARS. Additions, deletions, and/or changes to an Express PO line or schedule will create a change order. Updates to an Express PO may include things such as:</p> <ul style="list-style-type: none"> • Increase price/amount or quantity • Add a line to a PO, <u>OR</u> • Change distribution or shipping information <p>NOTE: Changes to Express POs may require that the Express PO be (1) resubmitted for approval; (2) budget checked; and (3) dispatched.</p>

GEARS Navigation

<p>Purchasing > Purchase Orders > Add/Update Express POs</p>	
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	<p>Locate the existing Express PO that you want to update by selecting the "Find an Existing Value" Tab.</p>	<p>Express Purchase Order</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p>

2. Enter the PO number or enter fields in the Search Criteria.

In this example, PO ID 0000061153 is entered.

3. Click the  button.

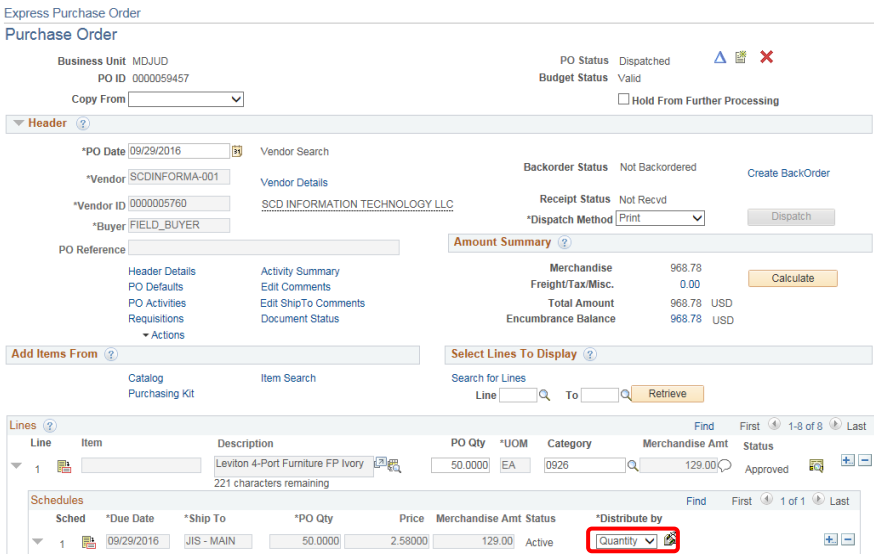
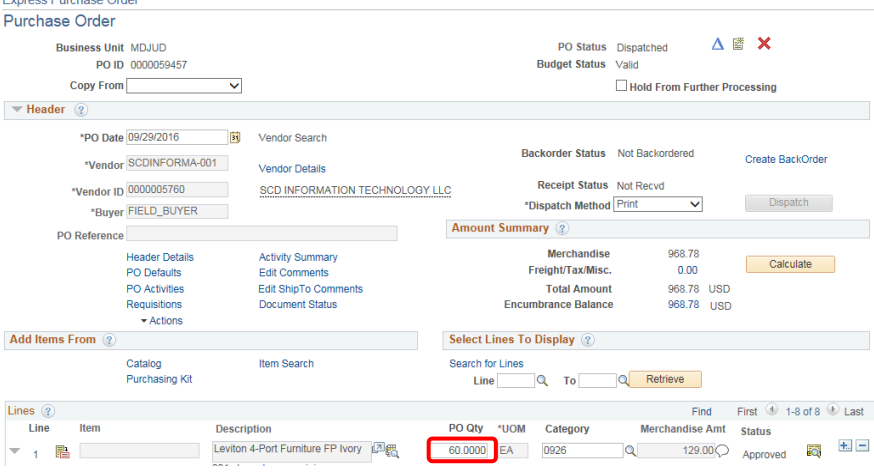
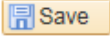
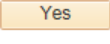
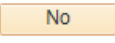
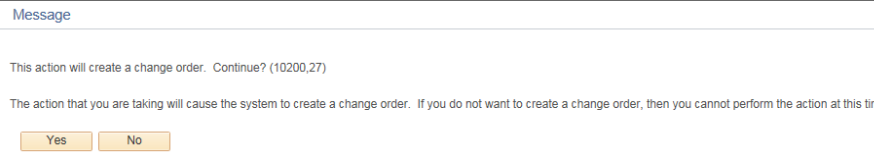
4a. For "Amount Only" Express POs –

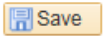
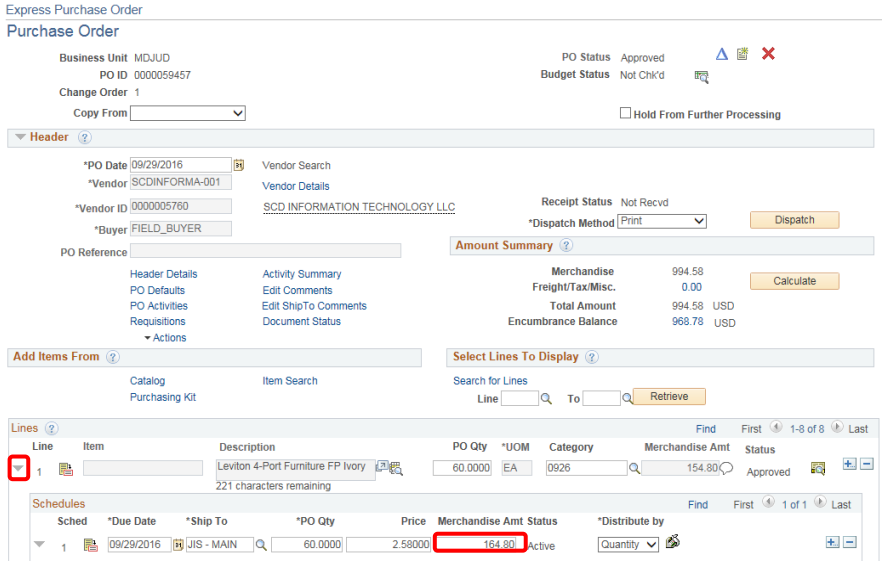
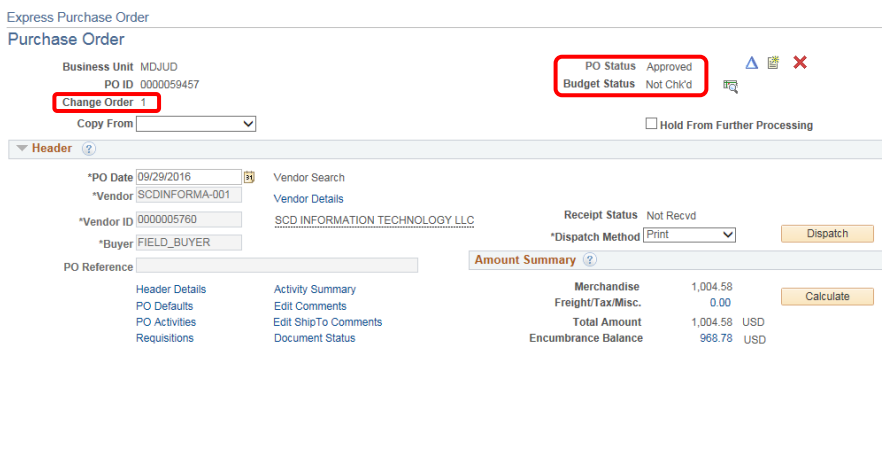

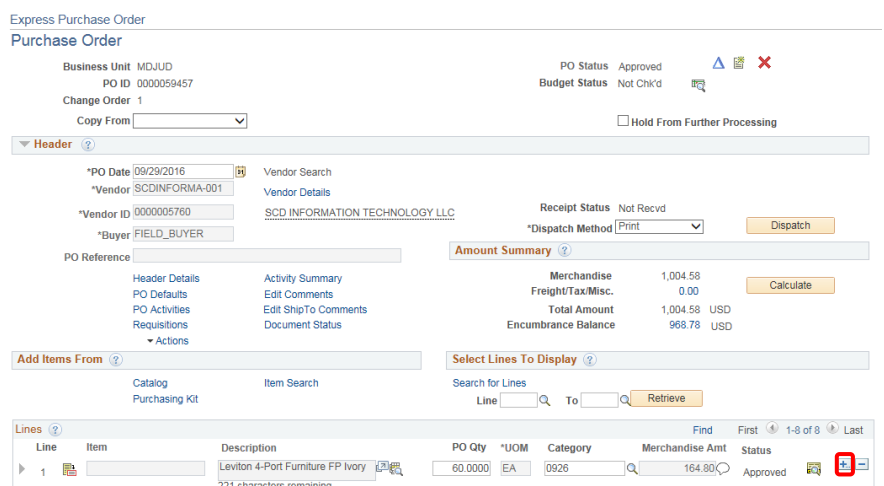
NOTE: Steps 4a through 4e allow you to change the amount of the Express PO.

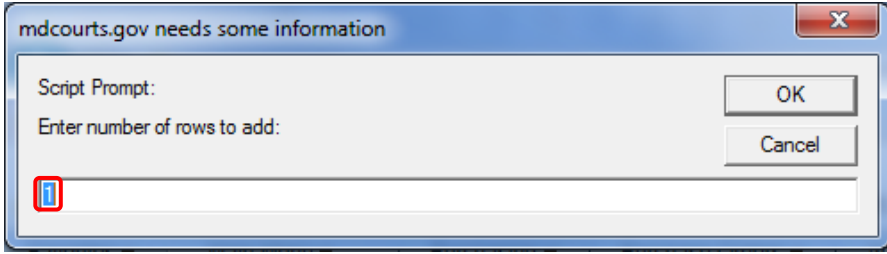
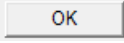
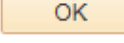
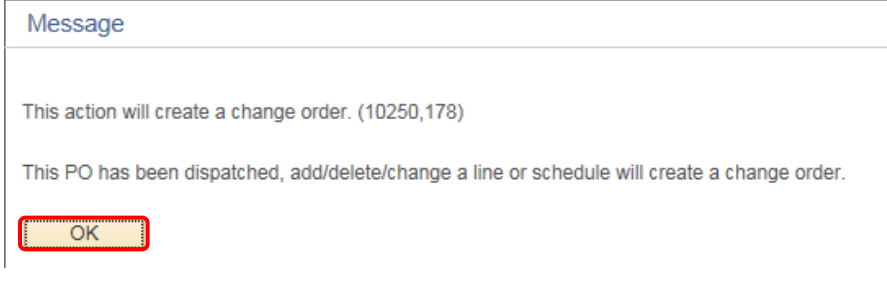
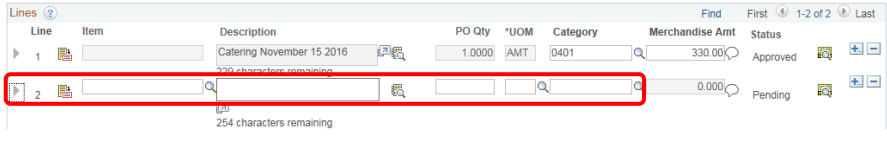
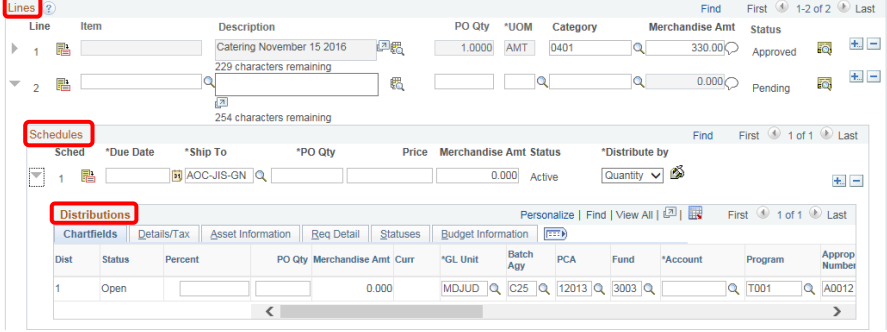
The Express PO MUST be "Amount Only" to change the amount. Click on the Line Details icon to confirm.





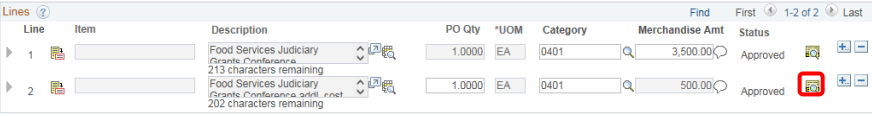
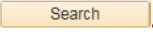
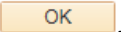
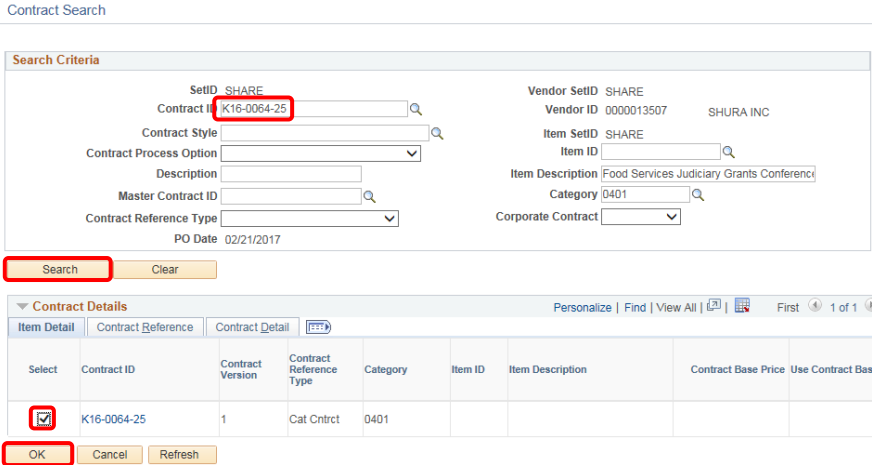
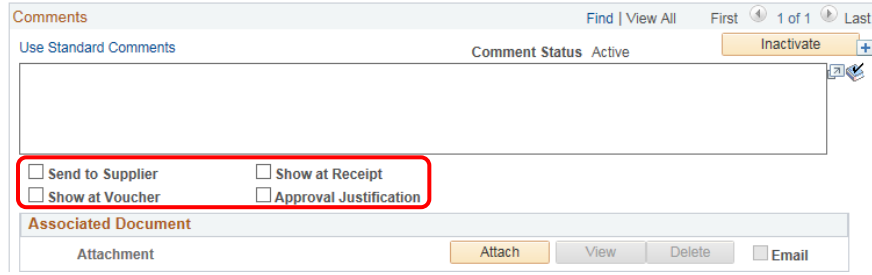
Under the Attributes section:
 Confirm that the Amount Only checkbox is turned on.


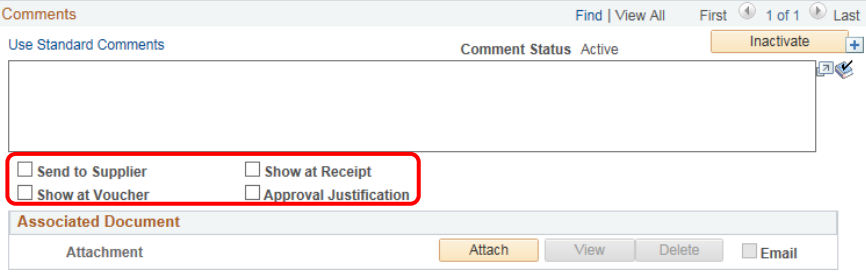







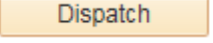
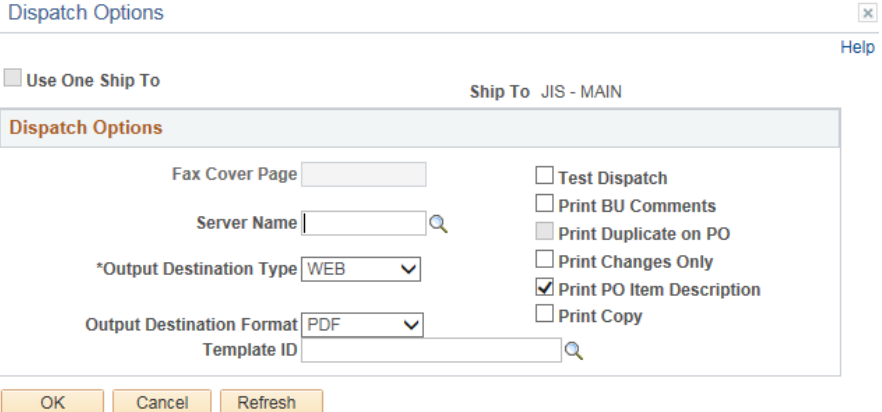

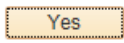
<p>4b. For “Amount Only” Express POs –</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, enter the amount change on the PO line.</p> <p>In this example, the PO Line 1 was increased from \$3,000.00 to \$3,500.00.</p>	
<p>4c. For “Amount Only” Express POs –</p> <p>Click the Save button.</p>	
<p>4d. For “Amount Only” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the Yes button.</p> <p>NOTE: If you select the No button, the system will not accept your changes and the field will remain unchanged.</p>	
<p>4e. For “Amount Only” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p> <p>**Skip to Step 8 to continue processing the Change Order for the Express PO amount change.</p>	

<p>5a. For “Quantity-Based” Express POs –</p> <p>NOTE: Steps 5a through 5f allow you to <u>change the quantity or price of the Express PO.</u></p> <p>The Express PO <u>MUST</u> be distributed by <u>Quantity</u> to change the quantity or price.</p> <p>In this example, PO ID 0000059457 is selected and the PO Quantity will be increased.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Copy From [dropdown]</p> <p>PO Status Dispatched Budget Status Valid</p> <p>Header</p> <p>*PO Date 09/29/2016 Vendor Search *Vendor SCDINFORMA-001 Vendor Details *Vendor ID 0000005760 SCD INFORMATION TECHNOLOGY LLC *Buyer FIELD_BUYER</p> <p>Backorder Status Not Backordered Create BackOrder Receipt Status Not Recvd *Dispatch Method Print Dispatch</p> <p>Amount Summary</p> <table border="1"> <tr><td>Merchandise</td><td>968.78</td></tr> <tr><td>Freight/Tax/Misc.</td><td>0.00</td></tr> <tr><td>Total Amount</td><td>968.78 USD</td></tr> <tr><td>Encumbrance Balance</td><td>968.78 USD</td></tr> </table> <p>Add Items From [dropdown] Select Lines To Display [dropdown]</p> <p>Search for Lines Line [input] To [input] Retrieve</p> <table border="1"> <thead> <tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr> </thead> <tbody> <tr><td>1</td><td></td><td>Leviton 4-Port Furniture FP Ivory</td><td>50.0000</td><td>EA</td><td>0926</td><td>129.00</td><td>Approved</td></tr> </tbody> </table> <p>Schedules</p> <table border="1"> <thead> <tr><th>Sched</th><th>*Due Date</th><th>*Ship To</th><th>*PO Qty</th><th>Price</th><th>Merchandise Amt</th><th>Status</th><th>*Distribute by</th></tr> </thead> <tbody> <tr><td>1</td><td>09/29/2016</td><td>JIS - MAIN</td><td>50.0000</td><td>2.58000</td><td>129.00</td><td>Active</td><td>Quantity</td></tr> </tbody> </table>	Merchandise	968.78	Freight/Tax/Misc.	0.00	Total Amount	968.78 USD	Encumbrance Balance	968.78 USD	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Leviton 4-Port Furniture FP Ivory	50.0000	EA	0926	129.00	Approved	Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by	1	09/29/2016	JIS - MAIN	50.0000	2.58000	129.00	Active	Quantity
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<p>5b. For “Quantity-Based” Express POs –</p> <p>Express Purchase Order Purchase Order</p> <p>On the Express Purchase Order screen, enter the quantity change on the PO line.</p> <p>In this example, the PO Qty was increased from 50 to 60.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Copy From [dropdown]</p> <p>PO Status Dispatched Budget Status Valid</p> <p>Header</p> <p>*PO Date 09/29/2016 Vendor Search *Vendor SCDINFORMA-001 Vendor Details *Vendor ID 0000005760 SCD INFORMATION TECHNOLOGY LLC *Buyer FIELD_BUYER</p> <p>Backorder Status Not Backordered Create BackOrder Receipt Status Not Recvd *Dispatch Method Print Dispatch</p> <p>Amount Summary</p> <table border="1"> <tr><td>Merchandise</td><td>968.78</td></tr> <tr><td>Freight/Tax/Misc.</td><td>0.00</td></tr> <tr><td>Total Amount</td><td>968.78 USD</td></tr> <tr><td>Encumbrance Balance</td><td>968.78 USD</td></tr> </table> <p>Add Items From [dropdown] Select Lines To Display [dropdown]</p> <p>Search for Lines Line [input] To [input] Retrieve</p> <table border="1"> <thead> <tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr> </thead> <tbody> <tr><td>1</td><td></td><td>Leviton 4-Port Furniture FP Ivory</td><td>60.0000</td><td>EA</td><td>0926</td><td>129.00</td><td>Approved</td></tr> </tbody> </table>	Merchandise	968.78	Freight/Tax/Misc.	0.00	Total Amount	968.78 USD	Encumbrance Balance	968.78 USD	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Leviton 4-Port Furniture FP Ivory	60.0000	EA	0926	129.00	Approved																
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<p>5d. For “Quantity-Based” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  Yes button.</p> <p>NOTE: If you select the  No button, the system will not accept your changes and the field will remain unchanged.</p>		 <p>Message</p> <p>This action will create a change order. Continue? (10200,27)</p> <p>The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.</p> <p>Yes No</p>																																								

<p>5e. For “Quantity-Based” Express POs –</p> <p>Once the quantity has been changed, it is now possible to change the price (if needed). If a price change is not needed, skip this step.</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, expand the Schedule Section, and enter the price change on the PO line.</p> <p>In this example, the Price was increased from 154.80 to 164.80.</p> <p>Click the  button.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Change Order 1</p> <p>PO Status Approved Budget Status Not Chkd</p> <p>PO Date 09/29/2016 Vendor SCDINFORMA-001 Vendor SCD INFORMATION TECHNOLOGY LLC Buyer FIELD_BUYER</p> <p>Amount Summary Merchandise 994.58 Freight/Tax/Misc. 0.00 Total Amount 994.58 USD Encumbrance Balance 968.78 USD</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>PO Qty</th> <th>UOM</th> <th>Category</th> <th>Merchandise Amt</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Leviton 4-Port Furniture FP Ivory</td> <td>60.0000</td> <td>EA</td> <td>0926</td> <td>154.80</td> <td>Approved</td> </tr> </tbody> </table> <p>Schedules</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Due Date</th> <th>*Ship To</th> <th>*PO Qty</th> <th>Price</th> <th>Merchandise Amt</th> <th>Status</th> <th>*Distribute by</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>09/29/2016</td> <td>JIS - MAIN</td> <td>60.0000</td> <td>2.58000</td> <td>164.80</td> <td>Active</td> <td>Quantity</td> </tr> </tbody> </table>	Line	Item	Description	PO Qty	UOM	Category	Merchandise Amt	Status	1		Leviton 4-Port Furniture FP Ivory	60.0000	EA	0926	154.80	Approved	Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by	1	09/29/2016	JIS - MAIN	60.0000	2.58000	164.80	Active	Quantity
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<p>5f. For “Quantity-Based” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p> <p>**Skip to Step 8 to continue processing the Change Order for the Express PO quantity/price change.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Change Order 1</p> <p>PO Status Approved Budget Status Not Chkd</p> <p>PO Date 09/29/2016 Vendor SCDINFORMA-001 Vendor SCD INFORMATION TECHNOLOGY LLC Buyer FIELD_BUYER</p> <p>Amount Summary Merchandise 1,004.58 Freight/Tax/Misc. 0.00 Total Amount 1,004.58 USD Encumbrance Balance 968.78 USD</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>PO Qty</th> <th>UOM</th> <th>Category</th> <th>Merchandise Amt</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Leviton 4-Port Furniture FP Ivory</td> <td>60.0000</td> <td>EA</td> <td>0926</td> <td>164.80</td> <td>Approved</td> </tr> </tbody> </table>	Line	Item	Description	PO Qty	UOM	Category	Merchandise Amt	Status	1		Leviton 4-Port Furniture FP Ivory	60.0000	EA	0926	164.80	Approved																
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<p>6a. For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>NOTE: Steps 6a through 6h allow you to add a line to the Express PO.</p> <p>In this example, PO ID 0000055489 is selected.</p> <p>On the Purchase Order screen, click the  plus sign button in the Lines section.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Change Order 1</p> <p>PO Status Approved Budget Status Not Chkd</p> <p>PO Date 09/29/2016 Vendor SCDINFORMA-001 Vendor SCD INFORMATION TECHNOLOGY LLC Buyer FIELD_BUYER</p> <p>Amount Summary Merchandise 1,004.58 Freight/Tax/Misc. 0.00 Total Amount 1,004.58 USD Encumbrance Balance 968.78 USD</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>PO Qty</th> <th>UOM</th> <th>Category</th> <th>Merchandise Amt</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Leviton 4-Port Furniture FP Ivory</td> <td>60.0000</td> <td>EA</td> <td>0926</td> <td>164.80</td> <td>Approved</td> </tr> </tbody> </table>	Line	Item	Description	PO Qty	UOM	Category	Merchandise Amt	Status	1		Leviton 4-Port Furniture FP Ivory	60.0000	EA	0926	164.80	Approved																
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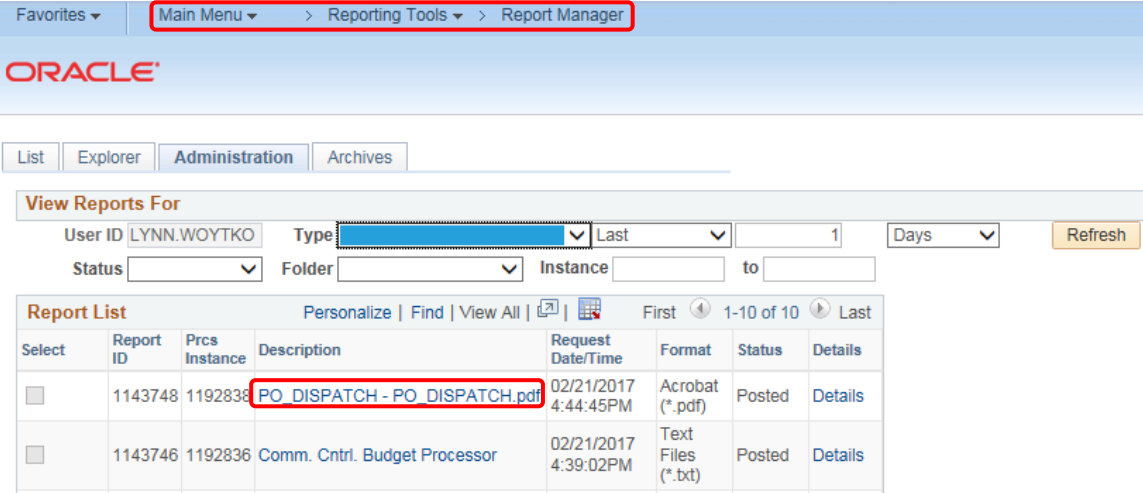
<p>6b.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Confirm the number of rows to be added. If one row is to be added, leave the default, ‘1’ in the field.</p> <p>In this example, only one row will be added to the Express PO.</p>	
<p>6c.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Click the  button.</p>	
<p>6d.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p>	
<p>6e.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>On the Express Purchase Order Purchase Order screen, the new PO line is added.</p>	 <p>In this example, this PO had 1 PO line and a 2nd line was added.</p>
<p>6f.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>On the Express Purchase Order Purchase Order screen:</p> <p>The following are required fields:</p> <ul style="list-style-type: none"> • Lines: Description, PO Qty, UOM, Category. • Schedules: Due Date, Ship To, Price/Merchandise Amt. <p>NOTE: If UOM on the line is anything other than “AMT”, enter the unit price in the “Price” field, else enter the amount in the “Merchandise Amt” field.</p> <ul style="list-style-type: none"> • Distributions: Account, Batch Agy, Fund, Program, Approp #, Approp Yr & PCA. 	 <p>For additional information of how to complete a PO Line, refer to the Tip Sheet, Creating an Express Purchase Order on the GEARS website (http://mdcourts.gov/gears/pdfs/tipsheetcreatingexpresspo.pdf)</p>

<p>6g.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Click the  button.</p>	
<p>6h.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p>	<div style="text-align: center;">   </div> <p>**Proceed to Step 7 to continue processing the Change Order for adding a line to the Express PO.</p>
<p>7a.</p>	<p>To associate your new PO lines with a Contract (if necessary) -</p> <p>Associate your new PO lines with a Contract (if necessary) by clicking on the .</p>	
<p>7b.</p>	<p>To associate your new PO lines with a Contract (if necessary) -</p> <p>Enter the Contract ID and then click .</p> <p>Select the contract by clicking on the <input checked="" type="checkbox"/> and then click .</p> <p>Now the PO line is associated with the Contract.</p>	
<p>8.</p>	<p>To add additional comments or supporting attachments:</p>	<p>General Express PO comments/attachments:</p> <ul style="list-style-type: none"> click the Add Comments Header link. select a group to display your comments to.  <p>Line specific comments/attachments:</p>

		<ul style="list-style-type: none"> click the  icon to the right of the Express PO Line. select a group to display your comments to.  <p>Click the  button.</p>
<p>9.</p>	<p>NOTE: You cannot move forward with the remaining steps unless the Express PO is in “Approved” status.</p> <p>Budget Check your Express PO.</p>	<p>NOTE: Only upon an “Approved” PO Status will you be able to run the Budget Check process by clicking the Budget Check icon .</p> 
<p>10.</p>	<p>Dispatch your Express PO.</p>	<p>NOTE: Only upon an “Approved” PO Status and a “Valid” Budget Status will you be able to run the Dispatch process by clicking the  button.</p> <p>Dispatching your Express PO is <u>required</u> in order to Receive and Voucher against the Express PO.</p> <p>*Dispatch Method  </p> <p>NOTE: The Dispatch Method defaults to “Print” but can be changed to “Email” for those vendors who have an email address associated with their vendor information on the Vendor Master File maintained by DBF.</p> <p>*Dispatch Method  </p>
<p>11.</p>	<p>Confirm the Dispatch Options & complete your Express PO.</p> <p>NOTE: You can click “No” rather than waiting for the Dispatch process to complete, however you will have to look up your Express PO to view the Dispatched status.</p>	<p>Dispatching via the “Print” method will display the following Dispatch Options.</p>  <p>There is no need to alter these options, just click the  button, then select  on the pop-up message to wait for the Dispatch process to</p>

		complete. Waiting for this process to complete will allow you to view the Express PO status as Dispatched.
12.	Your Express PO is complete.	<p>You will see the PO Status as “Dispatched” when the Dispatch process completes.</p> <p style="text-align: center;"> PO Status Dispatched Budget Status Valid </p> <p>NOTE: The Express Purchase Order must have these statuses to be received and vouchered against.</p>

13. **Once Dispatched, you can review the PDF version of the Express Purchase Order in your Report Manager under the Administration Tab. Navigation:** Reporting Tools > Report Manager



The screenshot shows the Oracle Report Manager interface. The navigation path is: Main Menu > Reporting Tools > Report Manager. The 'Administration' tab is selected. The 'View Reports For' section shows filters for User ID (LYNN.WOYTKO), Type (Last), and Instance (1). The 'Report List' table contains the following data:

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1143748	1192838	PO_DISPATCH - PO_DISPATCH.pdf	02/21/2017 4:44:45PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1143746	1192836	Comm. Cntrl. Budget Processor	02/21/2017 4:39:02PM	Text Files (*.txt)	Posted	Details