Creating Purchase Orders Overview

A Purchase Order (PO) is a document an agency uses to execute a purchase transaction with a Supplier. Cardinal tracks VDOT Supplier payments for goods and services against a PO. Purchase Orders can be created ad hoc, by copying from a Contract, Requisition, or another Purchase Order, or from a Strategic Sourcing Event. For instructions on creating a Purchase Order from a Strategic Sourcing Event, see the Job Aid titled **PR345 Setting up, Analyzing, and Awarding Strategic Sourcing Events (VDOT Only)** on the Cardinal website. Cardinal sends POs electronically to Virginia's online electronic procurement system (eVA). eVA sends a confirming order to the Supplier. eVA Direct Orders generate approved Cardinal Purchase Orders for receiving and vouchering.

Only ad hoc Purchase Orders created directly in Cardinal or from Contracts require approval. Purchase Orders created from a Requisition, Strategic Sourcing Event, or eVA do not require approval.

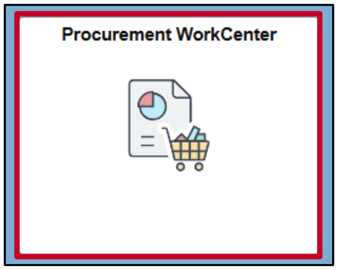
Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

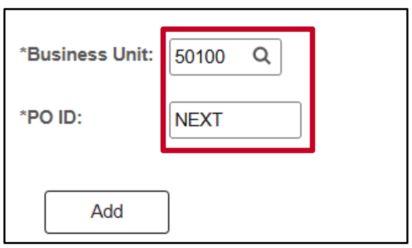
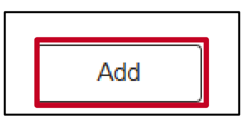
Table of Contents

Revision History

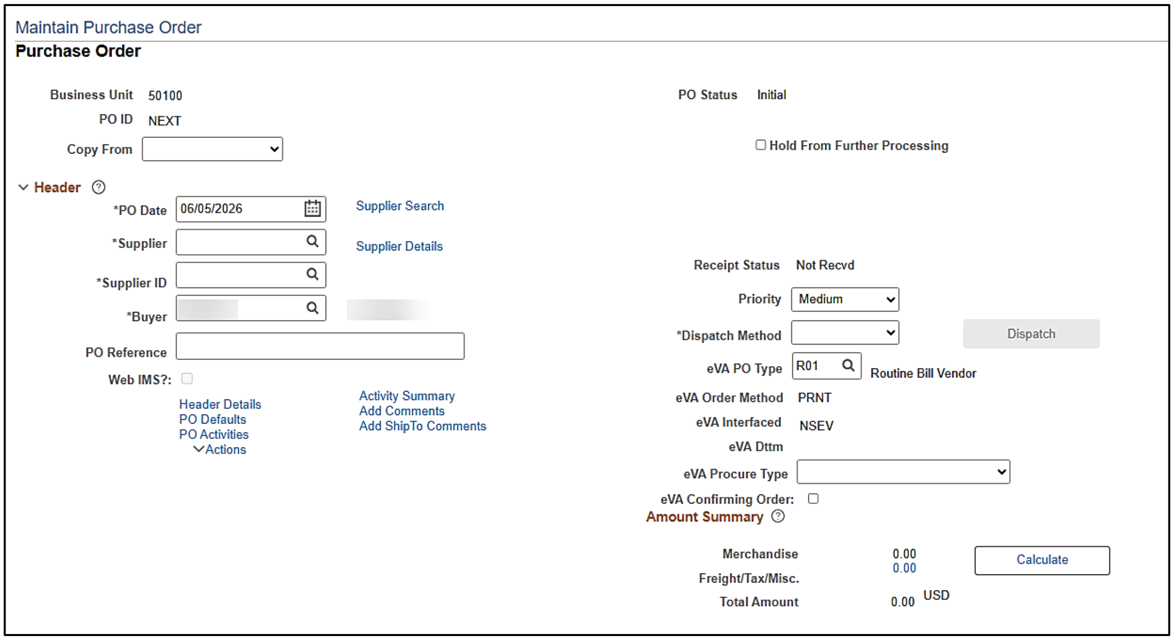
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades. Changed title from “Purchase Orders” to “Creating Purchase Orders”.
9/20/2023	Baseline.

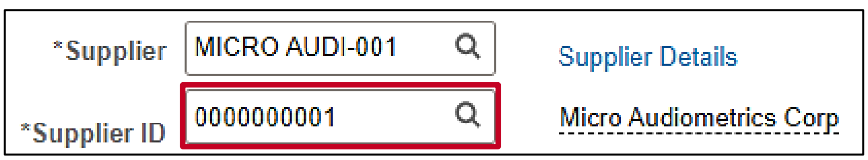
Creating an Ad hoc Purchase Order

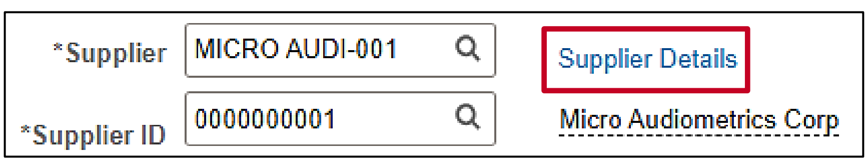
Step	Action
1.	Navigate to the **Purchase Order** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Purchase Order > Add/Update POs** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Purchase Order** page using the following navigation path: **NavBar** > **Menu** > **Purchasing** > **Purchase Orders** > **Add/Update POs**

Step	Action
The **Purchase Order Add a New Value** page displays. 	
	The **Business Unit** field should default based on the user's Agency. The **PO ID** field is automatically set to "NEXT" and should not be changed. Cardinal assigns a PO ID Number when the user saves the Purchase Order. 
3.	Click the **Add** button. 

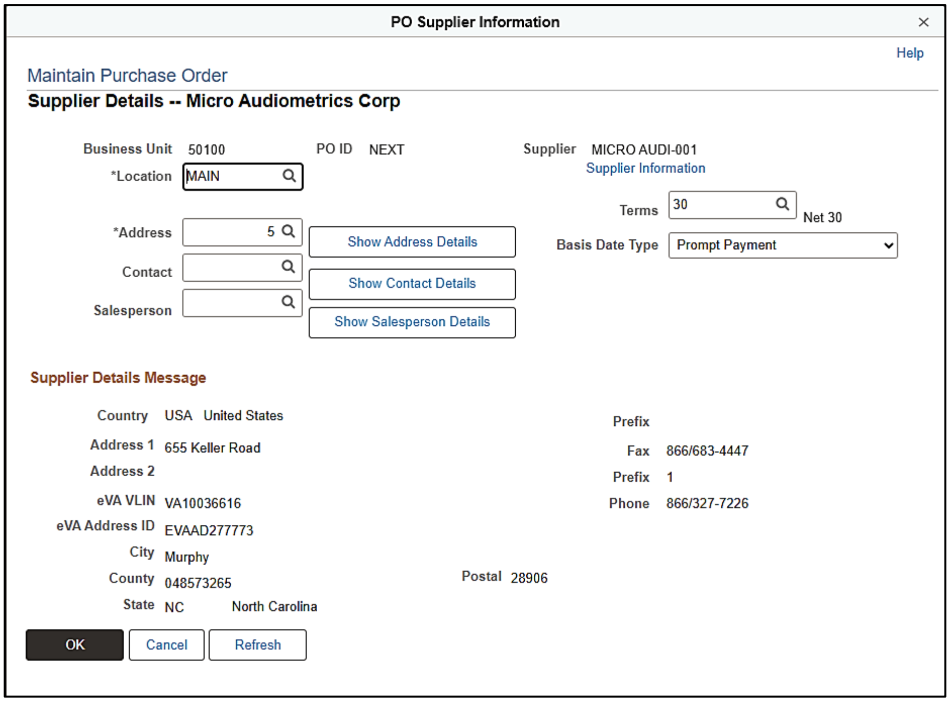
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The **Purchase Order** page displays.

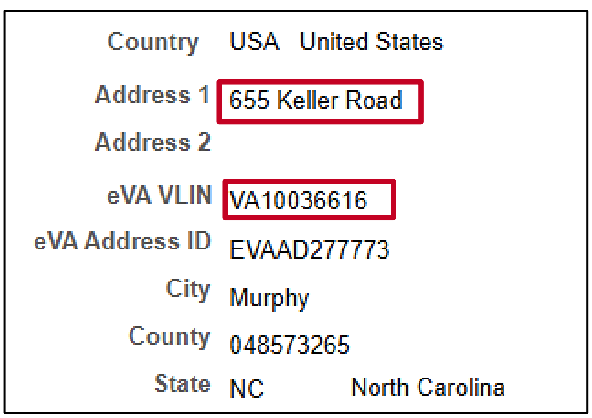

</td></tr>
<tr><td>4.</td><td>Enter the Supplier ID Number in the **Supplier ID** field

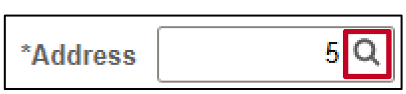

</td></tr>
<tr><td>5.</td><td>Click the **Supplier Details** link to verify the Supplier address.


</td></tr>
</table>

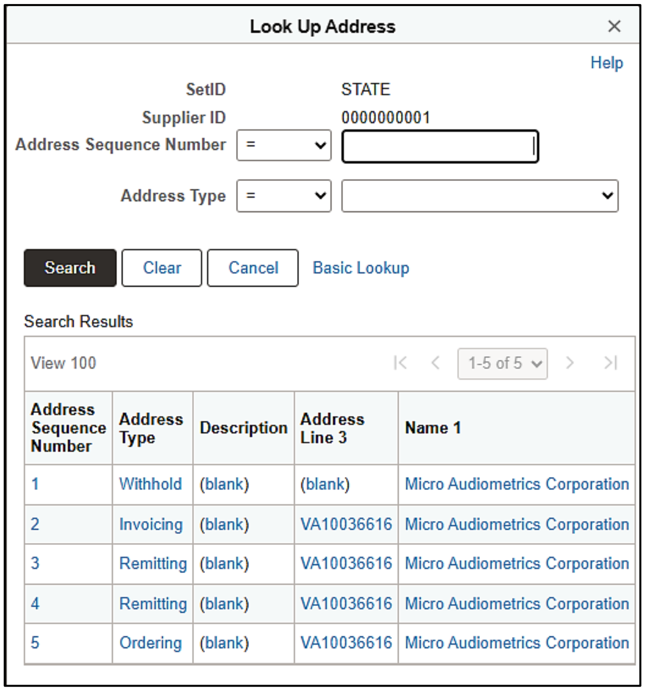
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Supplier Details page displays in a pop-up window.


</td></tr>
<tr><td>6.</td><td>Review the Supplier’s default order address and its eVA VLIN (Vendor Location ID Number).


</td></tr>
<tr><td>7.</td><td>Click the Address Look up icon to select a different address, if needed.

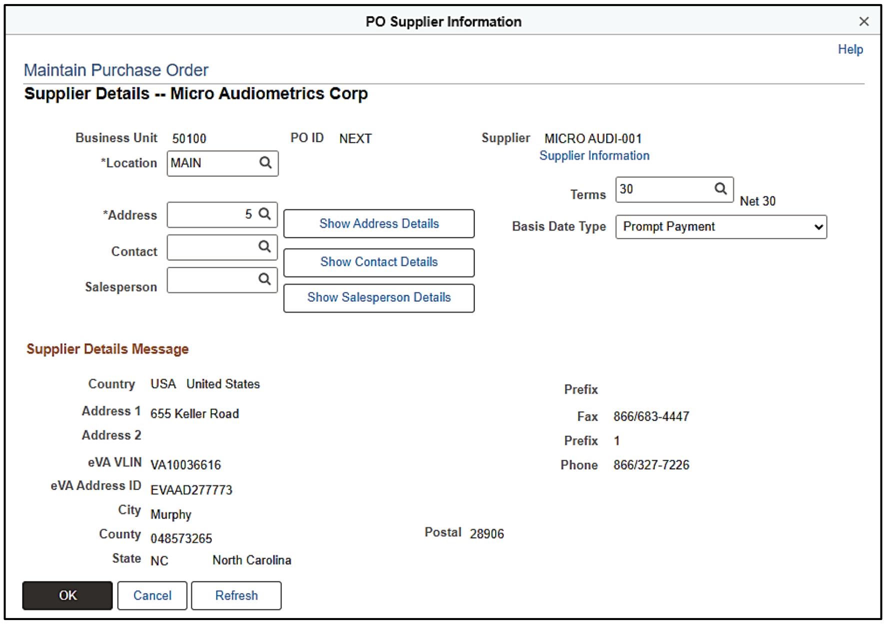
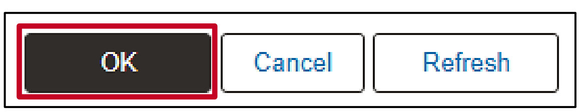

</td></tr>
</table>

Step	Action
	The **Look up Address** page opens in a pop-up window.



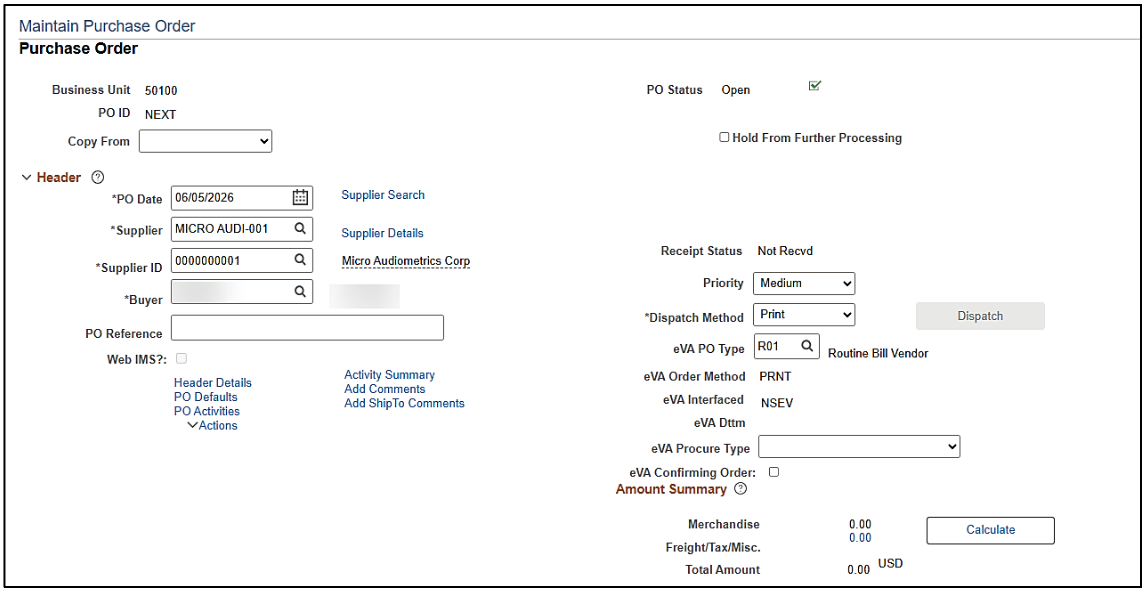
Step	Action
8.	Click the **Address Sequence Number** for the applicable address.

Address Sequence Number	Address Type	Description	Address Line 3	Name 1
1	Withhold	(blank)	(blank)	Micro Audiometrics Corporation
2	Invoicing	(blank)	VA10036616	Micro Audiometrics Corporation
3	Remitting	(blank)	VA10036616	Micro Audiometrics Corporation
4	Remitting	(blank)	VA10036616	Micro Audiometrics Corporation
5	Ordering	(blank)	VA10036616	Micro Audiometrics Corporation

Step	Action
	The **Supplier Details** page redisplays. 
	To verify additional supplier details, click the **Supplier Information** link. For instructions, see the Verifying Supplier Information section in this Job Aid. 
9.	Once any changes are made, click the **OK** button. 

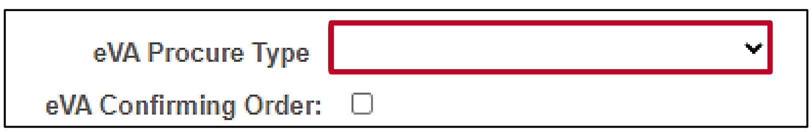
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Purchase Order** page redisplays.



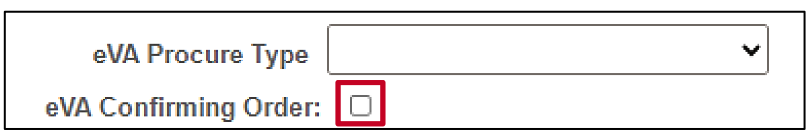
</td></tr>
<tr><td>10.</td><td>

Click the **eVA Procure Type** dropdown button and select the applicable value.



</td></tr>
<tr><td>11.</td><td>

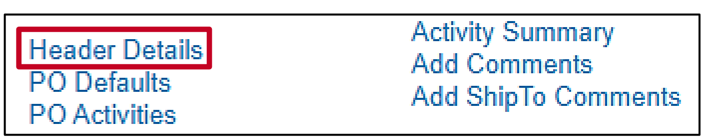
Select the **eVA Confirming Order** checkbox option as applicable.



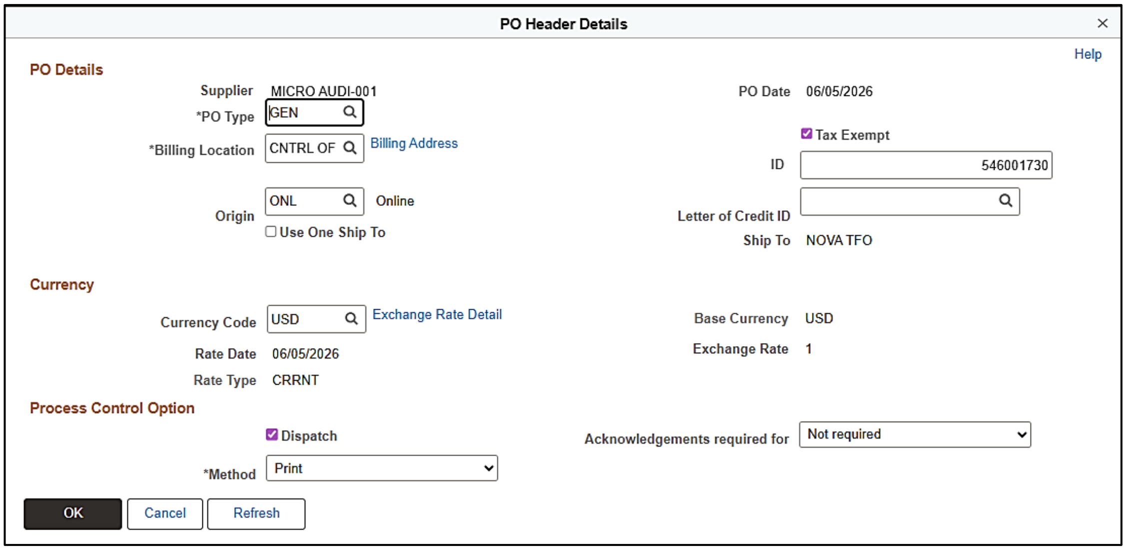
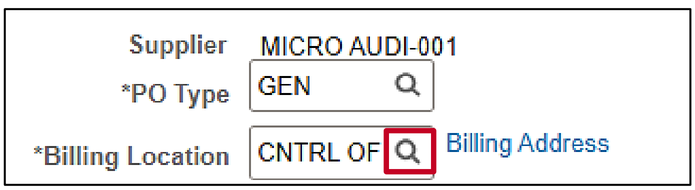
</td></tr>
<tr><td>12.</td><td>

To change the Billing Location, if needed, complete the following steps.

Click the **Header Details** link.

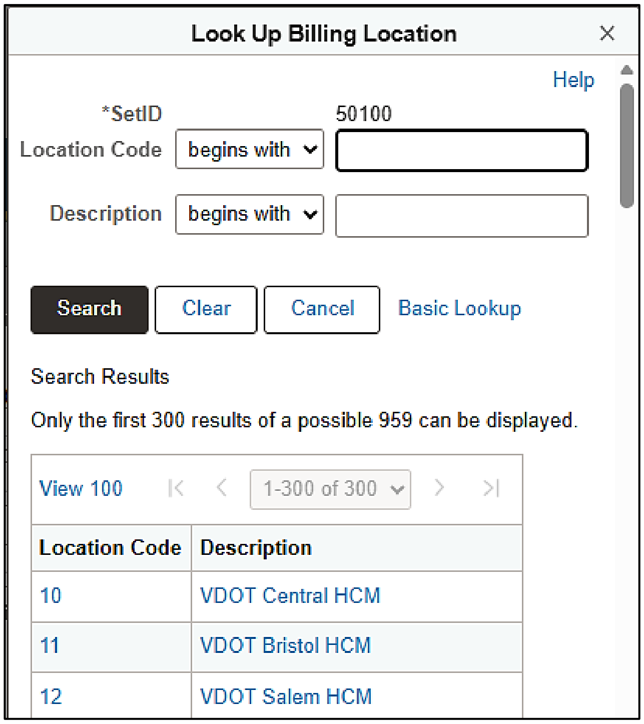


</td></tr>
</table>

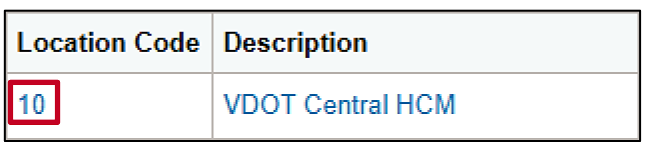
Step	Action
The **PO Header Details** page displays in a pop-up window. 	
13.	Click the **Billing Location Look up** icon. 

Step	Action

The **Look Up Billing Location** page displays in a pop-up window.



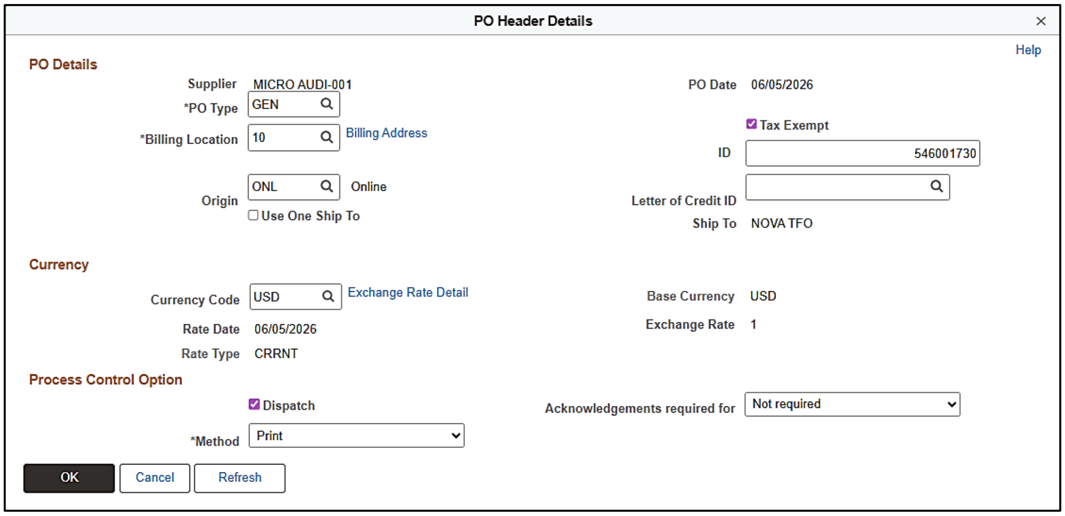
14. Click the **Location Code** for the applicable Billing Location.



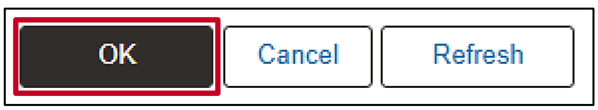
Location Code	Description
10	VDOT Central HCM

Step	Action

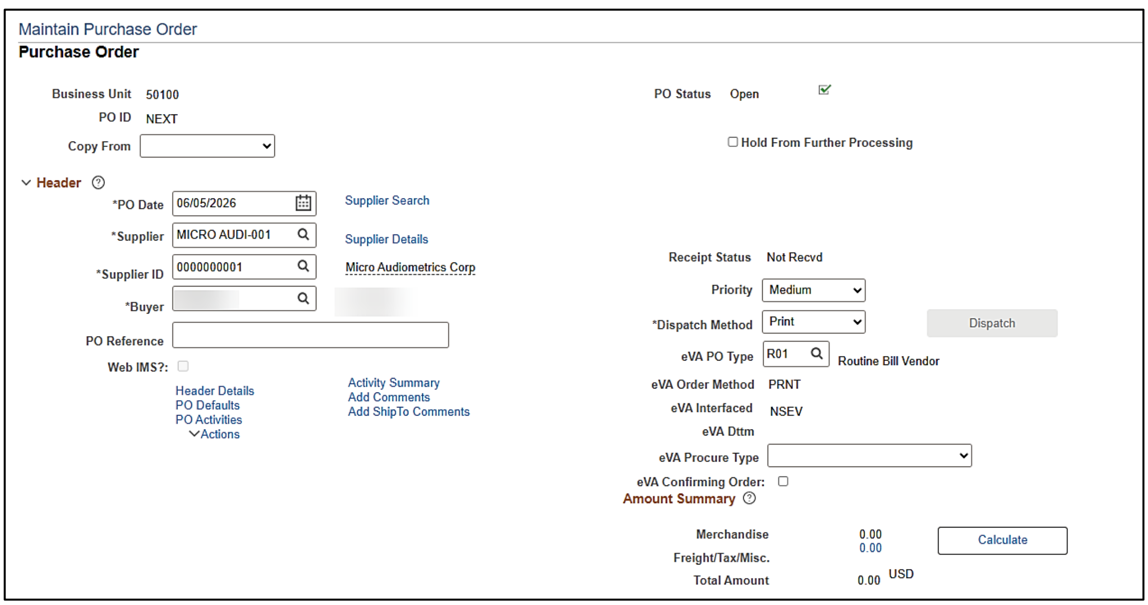
The **PO Header Details** page redisplays with the updated **Billing Location** displayed.

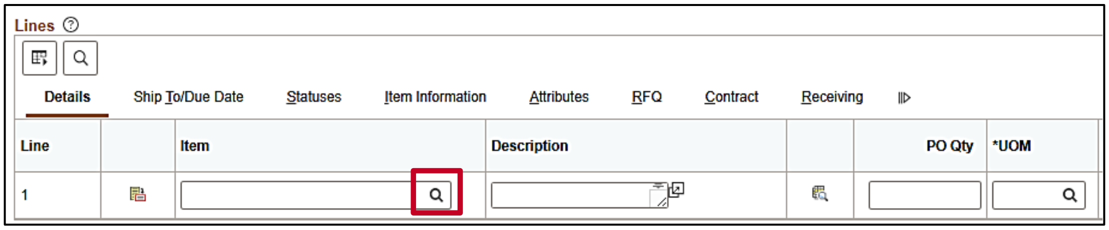
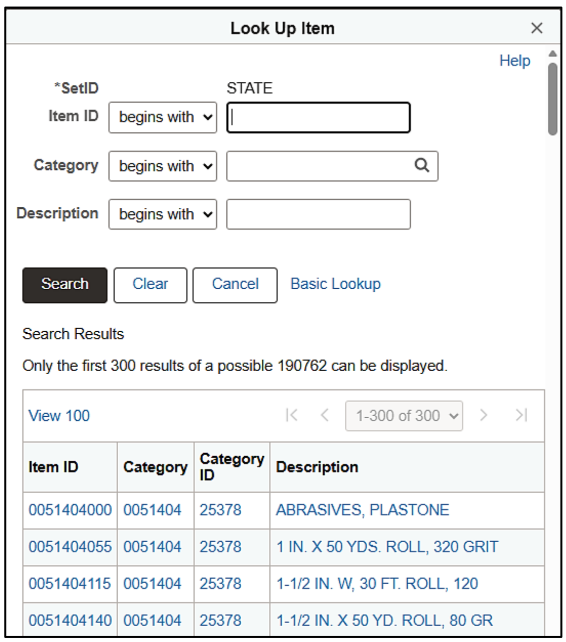
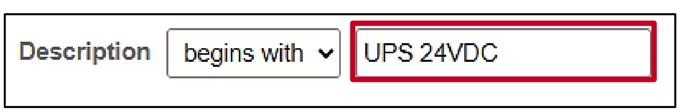
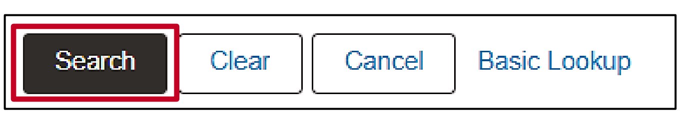


Step	Action
15.	Click the **OK** button.



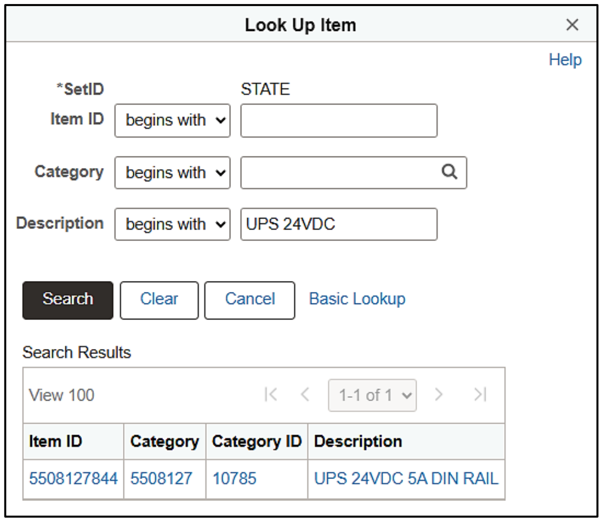
The **Purchase Order** page redisplays.



Step	Action
16.	Next, complete the Purchase Order Line(s). Click the **Item Look up** icon and select the applicable National Institute of Governmental Purchasing (NIGP) Item Number. 
The **Look Up Item** page displays in a pop-up window. 	
17.	Enter key search information in the **Description** field. 
18.	Click the **Search** button. 

Step	Action

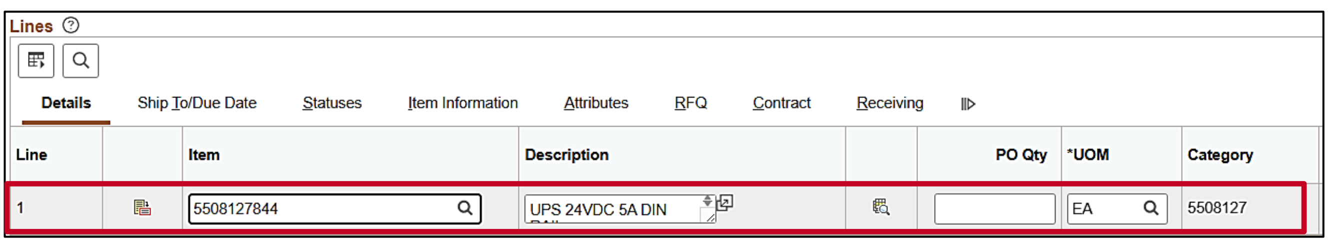
The **Search Results** display.



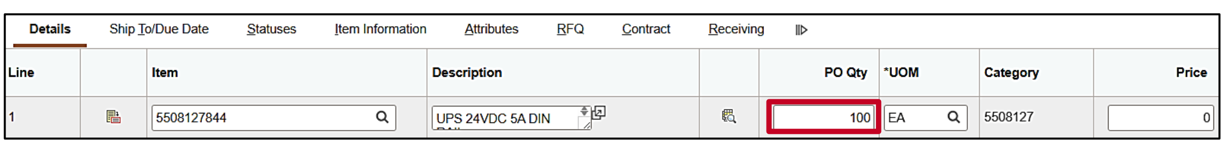
19. Click the link within the **Item ID** column to select the applicable Item.

Item ID	Category	Category ID	Description
5508127844	5508127	10785	UPS 24VDC 5A DIN RAIL

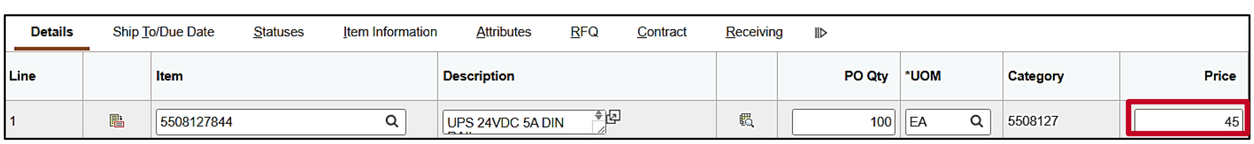
The **Purchase Order** page redisplays with the **Item** field populated for Line 1 in the **Lines** section.

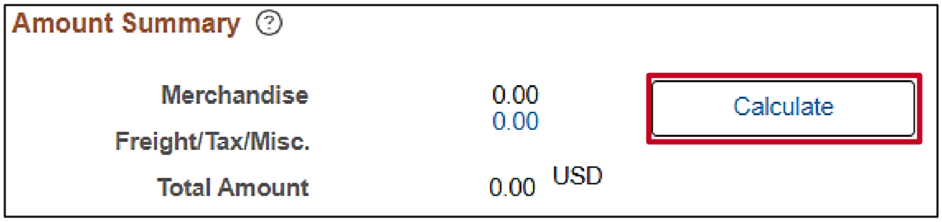
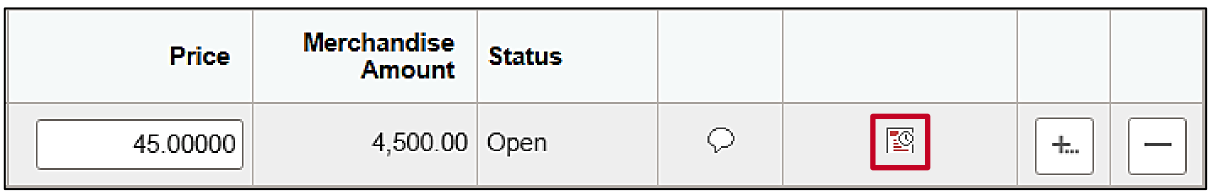
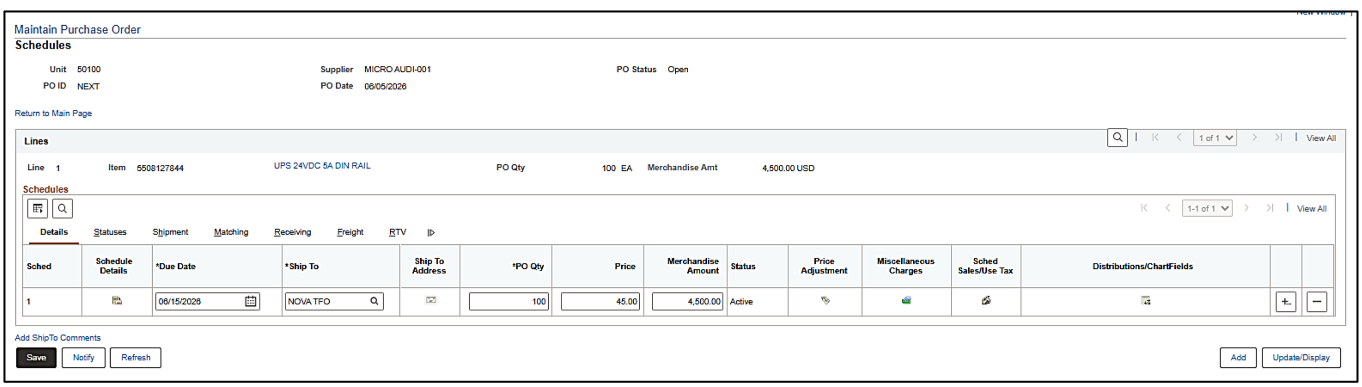


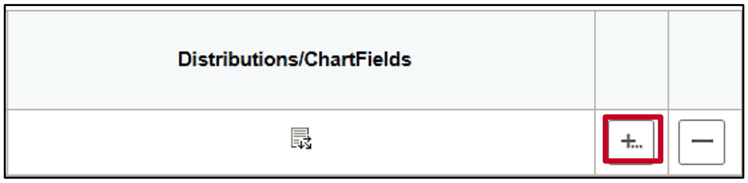
20. Enter the quantity ordered in the **PO Qty** field.

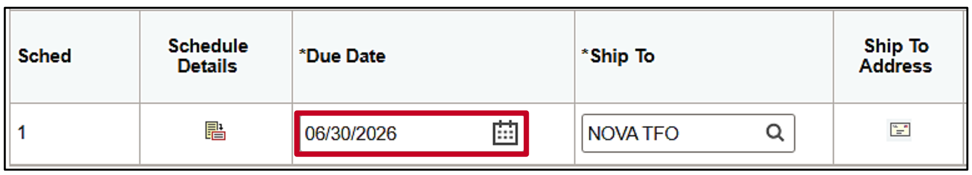


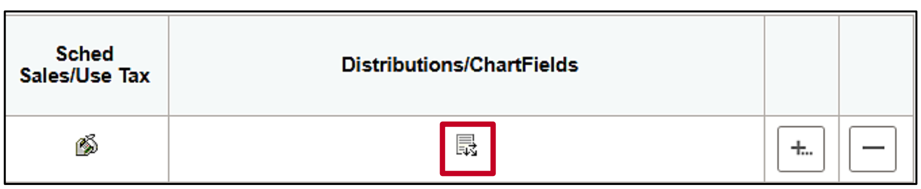
21. Enter the Item's price in the **Price** field.

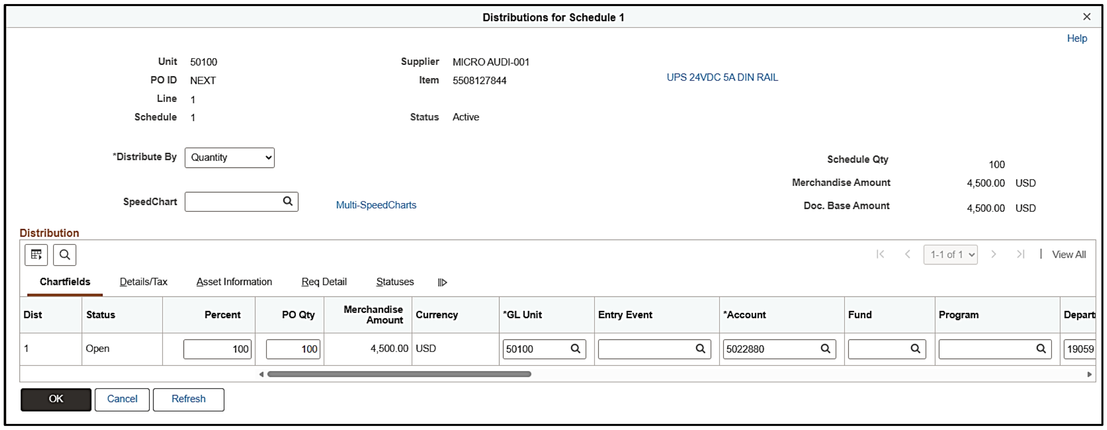
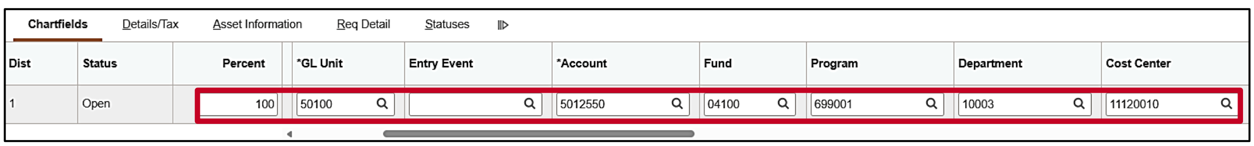
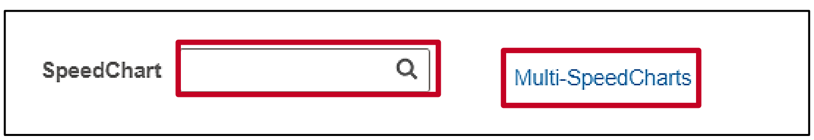
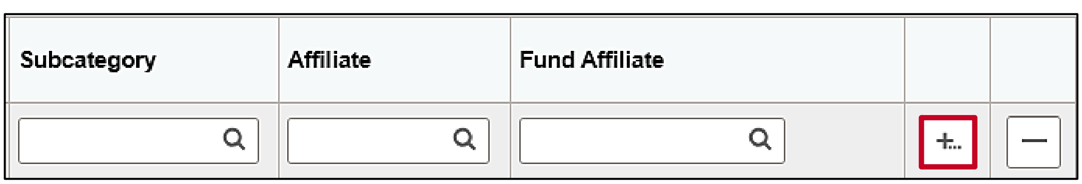
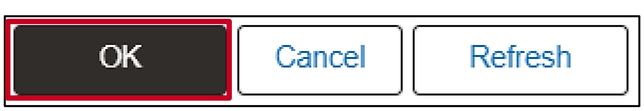


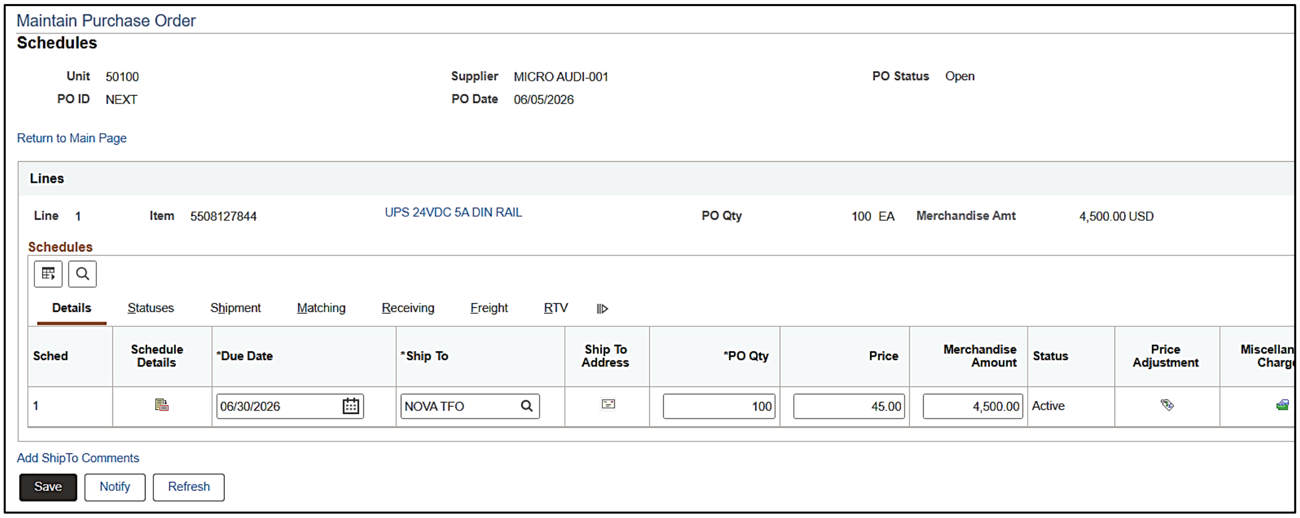
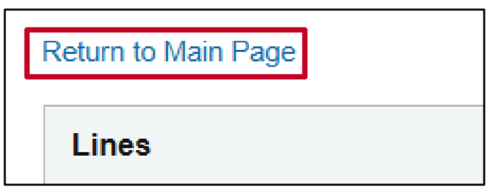
Step	Action
22.	Click the **Calculate** button in the **Account Summary** section. 
The total Merchandise Amount displays in the **Merchandise Amount** field. 	
23.	Click the **Schedule** icon on each Line to enter the due date and verify where and to whom the Items should be delivered. 
The **Maintain Purchase Order – Schedules** page displays. 	

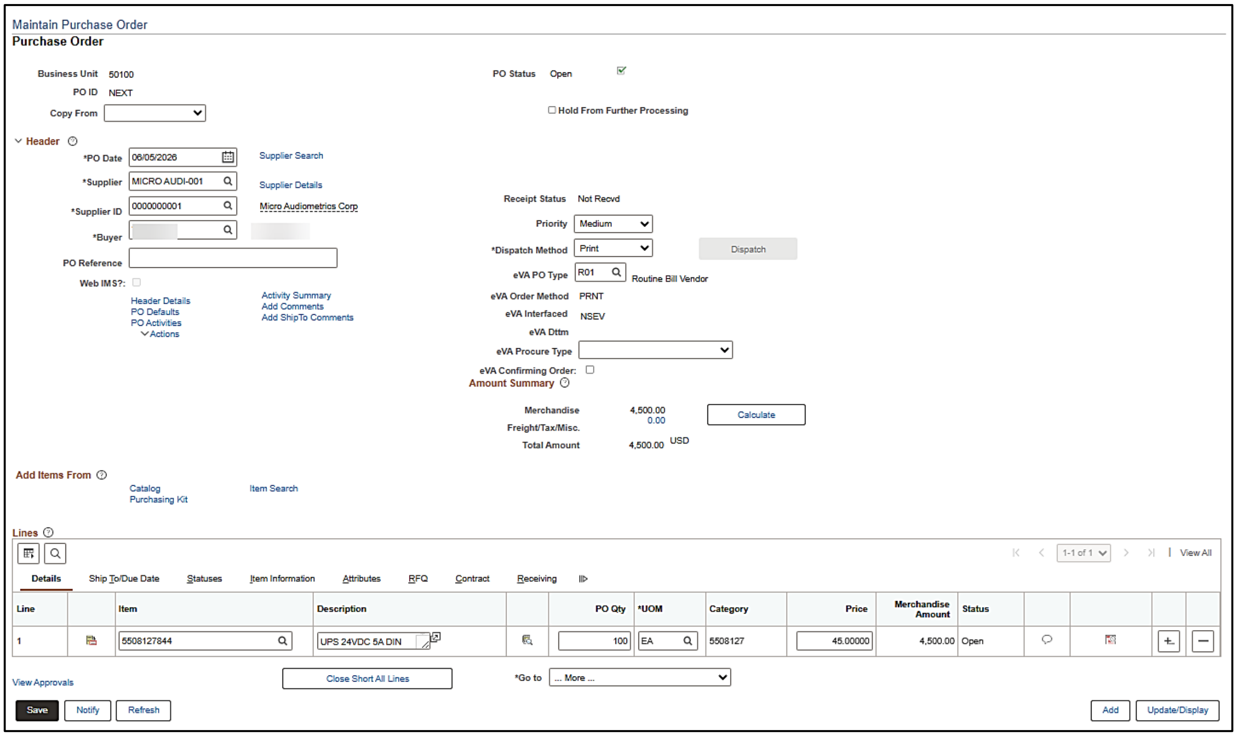
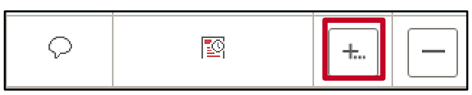
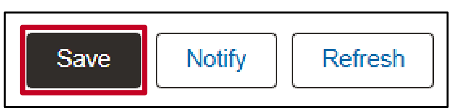
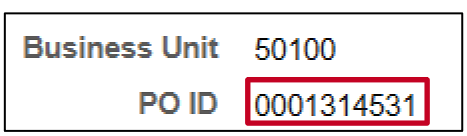
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Never click the Add a New Row (+) icon to add a Schedule.


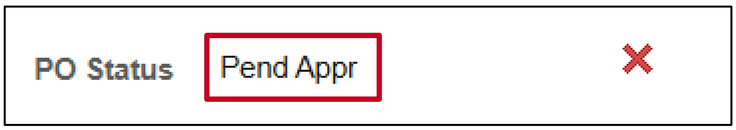
There should only be one Schedule per Purchase Order Line because the interface with eVA does not permit such an action and will cause the Purchase Order to error out. Create another Purchase Order Line for each separate Schedule required.</td></tr>
<tr><td>24.</td><td>Click the Due Date Calendar icon and select the desired delivery date.

</td></tr>
<tr><td>25.</td><td>Verify the defaulted delivery location in the Ship To field. Update as needed.

</td></tr>
<tr><td>26.</td><td>Click the Distribution icon to enter the accounting distribution for the Line.

</td></tr>
</table>

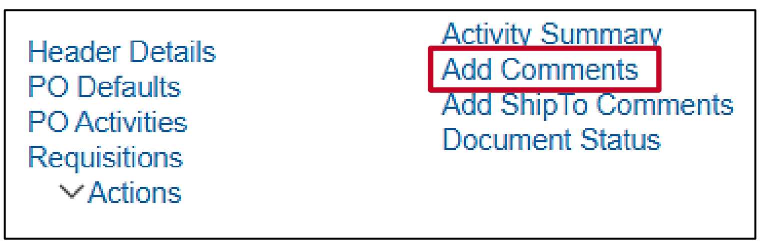
Step	Action
	The **Distributions for Schedule [X]** page displays in a pop-up window. 
27.	Enter the applicable ChartField values in the corresponding fields. 
	A Schedule may have one or more ChartField distributions. The ChartField values identify the accounting distribution. Valid Account, Department, Cost Center, and Project values are required. A ChartField value can be manually entered, or the **Multi-SpeedCharts** link can be used to select a SpeedChart value to automatically populate some of the ChartField values. 
28.	Scroll right and click the **Add a New Row** (**+**) icon at the end of the accounting Distribution Line to insert additional accounting distributions as needed. 
29.	Click the **OK** button. 

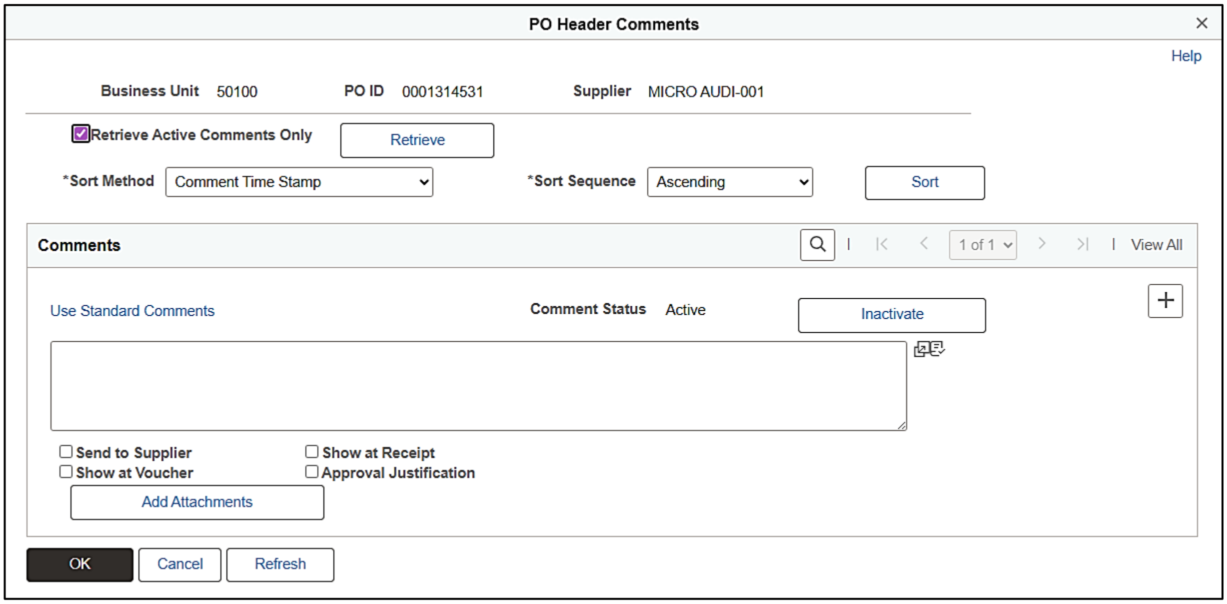
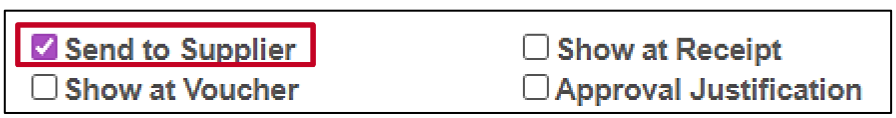
Step	Action
	The **Maintain Purchase Order Schedules** page redisplays. 
30.	Click the **Return to Main Page** link. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Purchase Order page redisplays.

</td></tr>
<tr><td></td><td>Click the Add a New Row (+) icon to the right of an existing Line to add a new Line and then repeat Steps 16 - 30.
</td></tr>
<tr><td>31.</td><td>Click the Save button.

</td></tr>
<tr><td>32.</td><td>The page refreshes and the PO ID Number is systematically assigned.

</td></tr>
</table>

Step	Action
33.	Once all of the Lines have been entered, click the **Submit for Approval** icon to send the Purchase Order to the supervisor for approval. 
The **PO Status** field is updated to "Pend Appr" (i.e., "Pending Approval") and the **Submit for Approval** icon disappears. 	
	A Purchase Order must be approved and dispatched in order to be received or vouchered against. For instructions on manually dispatching a Purchase Order see the Dispatching a Purchase Order section in this Job Aid.

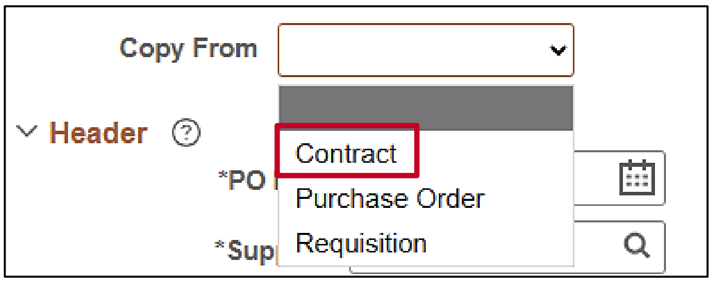
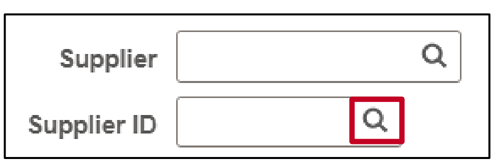
Purchase Order Comments

Step	Action
1.	From the **Maintain Purchase Order** page, click the **Add Comments** link. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The PO Header Comments page displays in a pop-up window.

</td></tr>
<tr><td>2.</td><td>Click the Send to Supplier checkbox for comments to print on the PO.

</td></tr>
<tr><td></td><td>Uncheck the Send to Supplier checkbox for any inactive comments or other comments that do <u>not</u> need to print on the PO.</td></tr>
</table>

Copying From a Contract (All Lines)

A Purchase Order can be created by copying from an existing Procurement Contract. When this is done, all Contract Lines are copied to the Purchase Order at once.

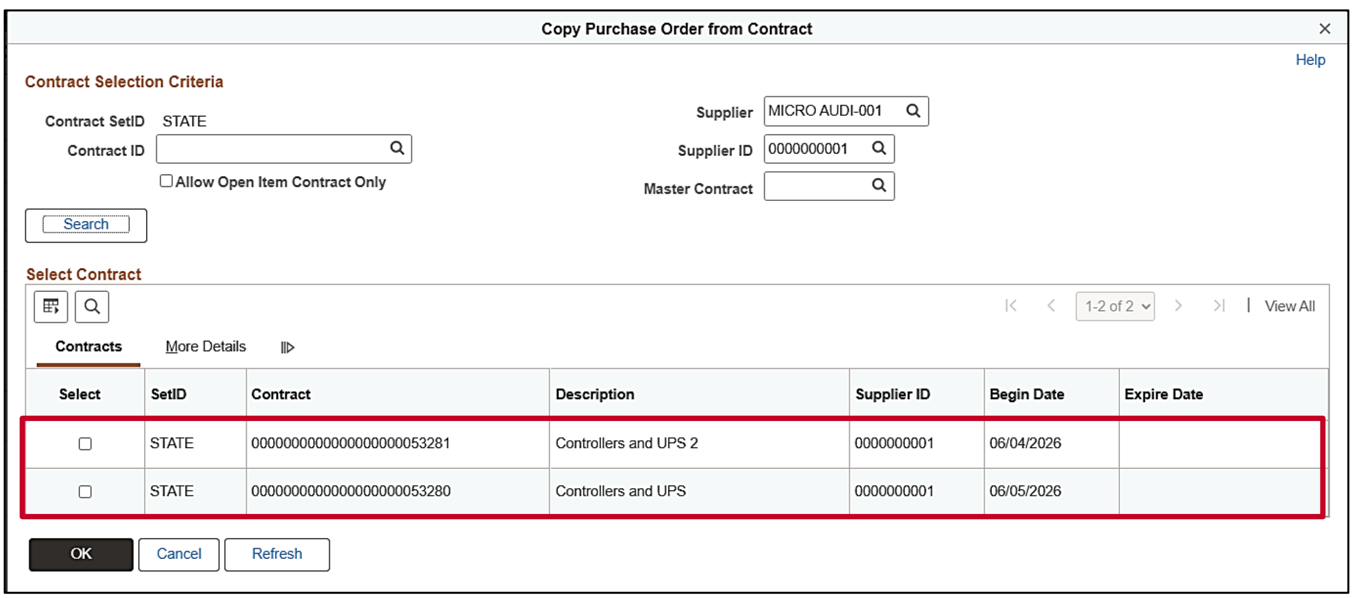
Step	Action
1.	Create a new Purchase Order by following Steps 1 - 3 of the Creating an Ad hoc Purchase Order section in this Job Aid.
2.	Click the **Copy From** dropdown button and select "Contract". 
The **Copy Purchase Order from Contract** page displays in a pop-up window.  	
3.	Click the **Supplier ID Look up** icon and select the applicable Supplier ID Number. 

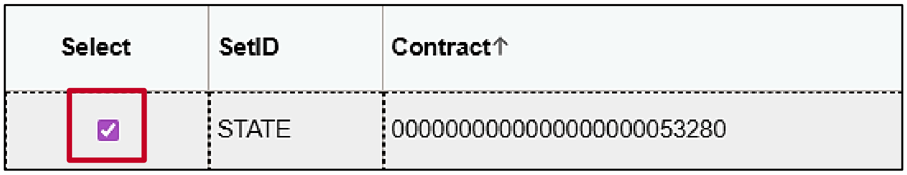
Step	Action

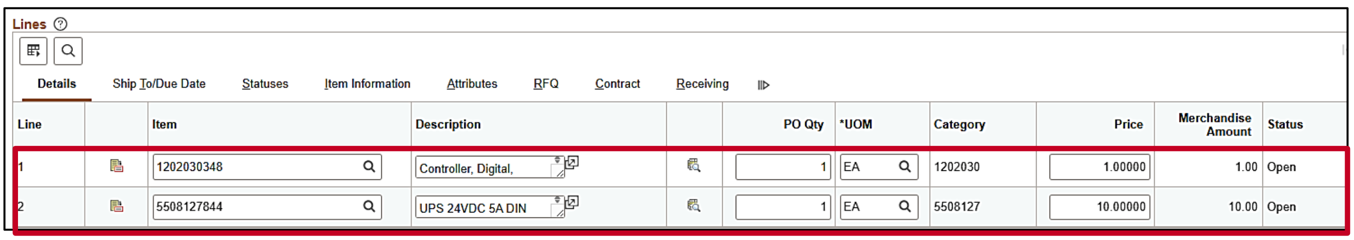
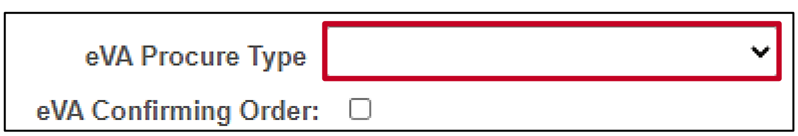
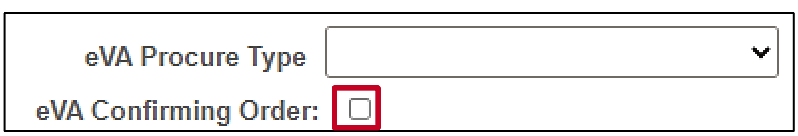
The **Copy Purchase Order from Contract** page redisplays with the Supplier and Supplier ID populated.

Step	Action
4.	Click the **Search** button.

All Contracts for the selected Supplier display in the **Select Contract** section.



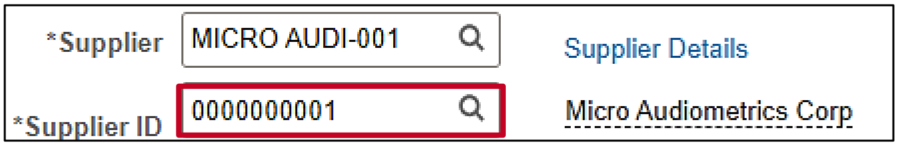
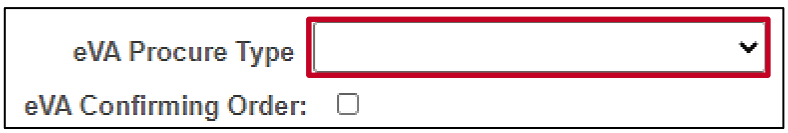
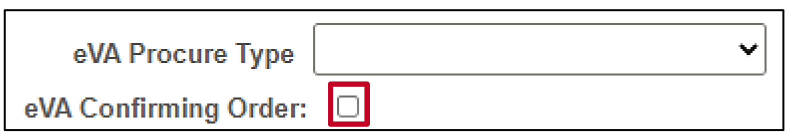
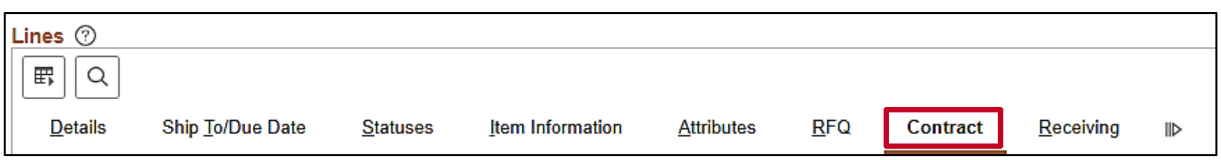
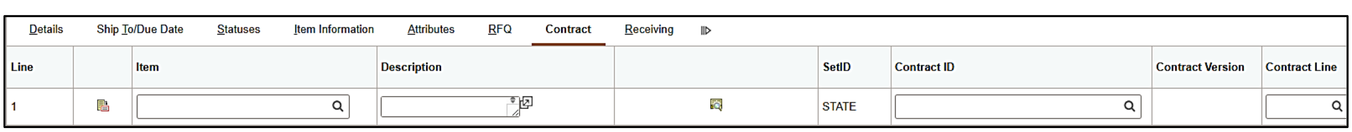
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Select checkbox to the left of the desired Contract.

</td></tr>
<tr><td>6.</td><td>Click the OK button.

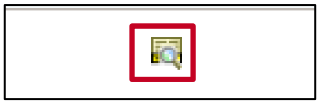
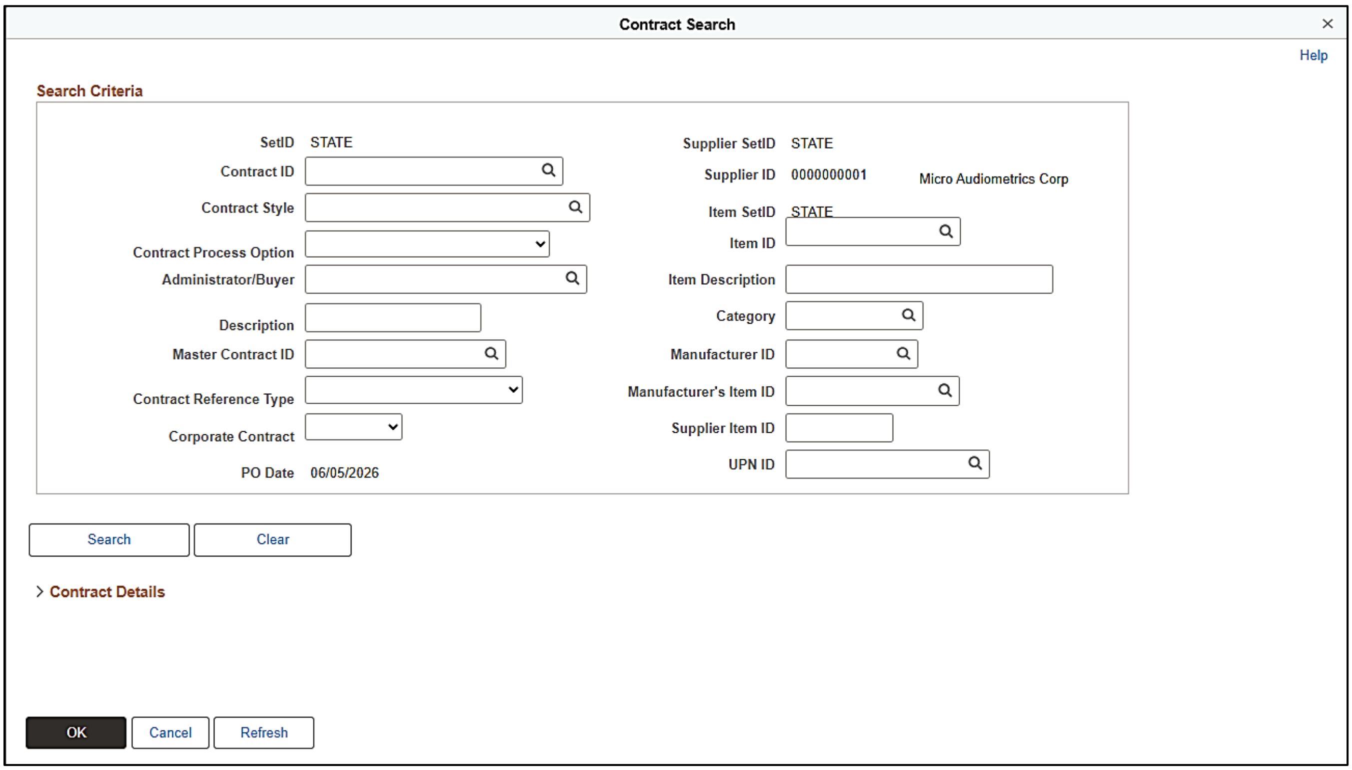
</td></tr>
<tr><td colspan="2">The Purchase Order page redisplays with all Contract Lines copied into the Lines section.

</td></tr>
<tr><td></td><td>For instructions on setting accounting distribution field values for all lines, see the Setting Purchase Order Defaults section in this Job Aid.</td></tr>
<tr><td>7.</td><td>Verify the Supplier address by following Steps 5 - 9 of the Creating an Ad hoc Purchase Order section in this Job Aid.</td></tr>
<tr><td>8.</td><td>Click the eVA Procure Type dropdown button and select the applicable value.

</td></tr>
<tr><td>9.</td><td>Select the eVA Confirming Order checkbox option as applicable.

</td></tr>
<tr><td>10.</td><td>Verify the billing address by following Steps 12 - 15 of the Creating an Ad hoc Purchase Order section in this Job Aid.</td></tr>
<tr><td>11.</td><td>Complete the Quantity, Price, Schedule, and Distribution for each Line by following Steps 20 - 30 of the Creating an Ad hoc Purchase Order section in this Job Aid.</td></tr>
</table>

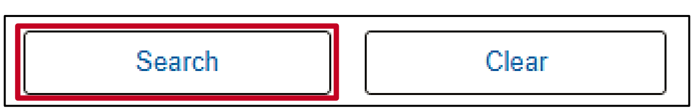
Step	Action
12.	Save and submit the Purchase Order for approval by following Steps 31 - 33 of the Creating an Ad hoc Purchase Order section in this Job Aid.
	A Purchase Order must be dispatched in order to be received or vouchered against. For instructions on manually dispatching a Purchase Order see the Dispatching a Purchase Order section in this Job Aid.

Copying From a Contract (One Line)

A Purchase Order can be created by copying one or more individual lines from an existing Procurement Contract.

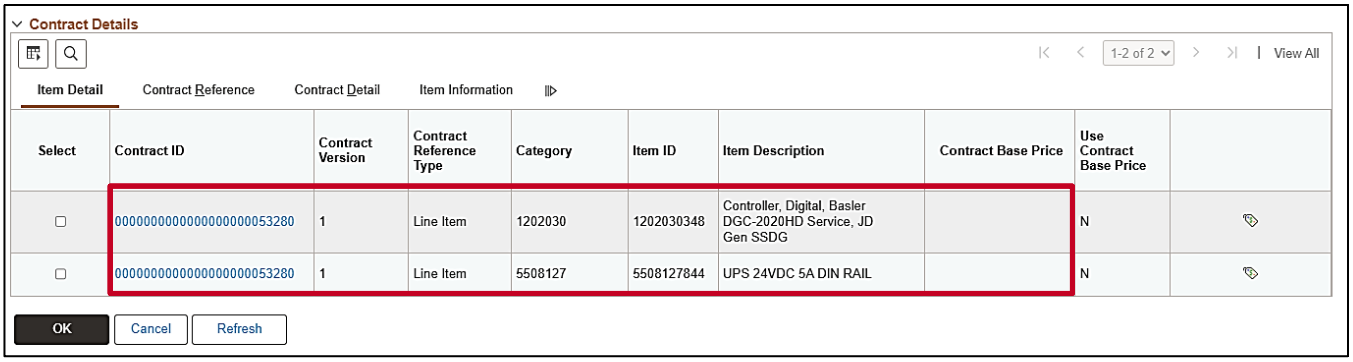
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Create a new Purchase Order by following Steps 1 - 3 of the Creating an Ad hoc Purchase Order section in this Job Aid.</td></tr>
<tr><td>2.</td><td>Enter the Supplier ID Number in the Supplier ID field.
</td></tr>
<tr><td>3.</td><td>Verify the Supplier address by following Steps 5 - 9 of the Creating an Ad hoc Purchase Order section in this Job Aid.</td></tr>
<tr><td>4.</td><td>Click the eVA Procure Type dropdown button and select the applicable value.
</td></tr>
<tr><td>5.</td><td>Select the eVA Confirming Order checkbox option as applicable.
</td></tr>
<tr><td>6.</td><td>Verify the billing address by following Steps 12 - 15 of the Creating an Ad hoc Purchase Order section in this Job Aid.</td></tr>
<tr><td>7.</td><td>Click the Contract tab in the Lines section.
</td></tr>
<tr><td colspan="2">The Contract tab displays.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Click the Contract Search icon.
</td></tr>
<tr><td colspan="2">The Contract Search page displays in a pop-up window.

</td></tr>
<tr><td></td><td>Enter a Contract ID Number in the Contract ID field to narrow the search results to a single contract.

</td></tr>
<tr><td>9.</td><td>Click the Search button.

</td></tr>
</table>

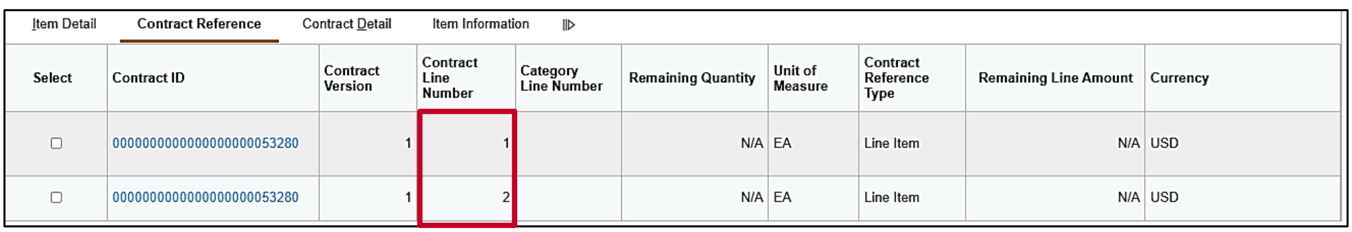
Step	Action

The **Item Detail** tab displays the **Contract ID**, **Item Description**, and **Contract Base Price** for each Contract Line within the search results.



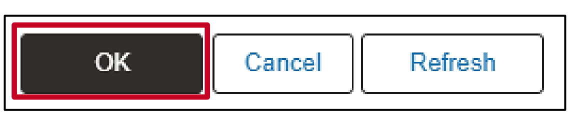
10. Click the **Contract Reference** tab.

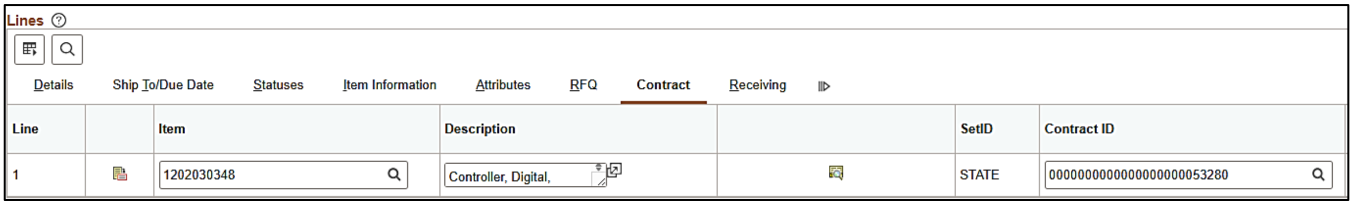
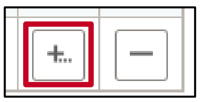
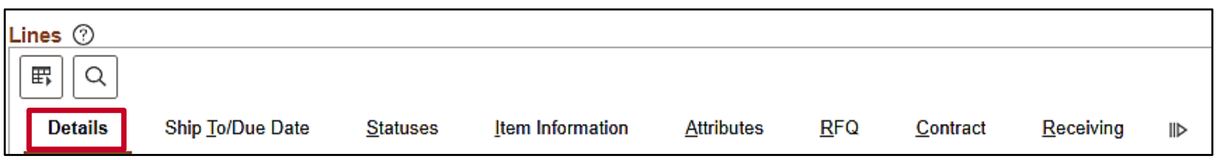
The **Contract Reference** tab displays. Each unique **Contract Line Number** displays for all search results.



11. Click the **Select** checkbox to the left of the Contract Line to copy.

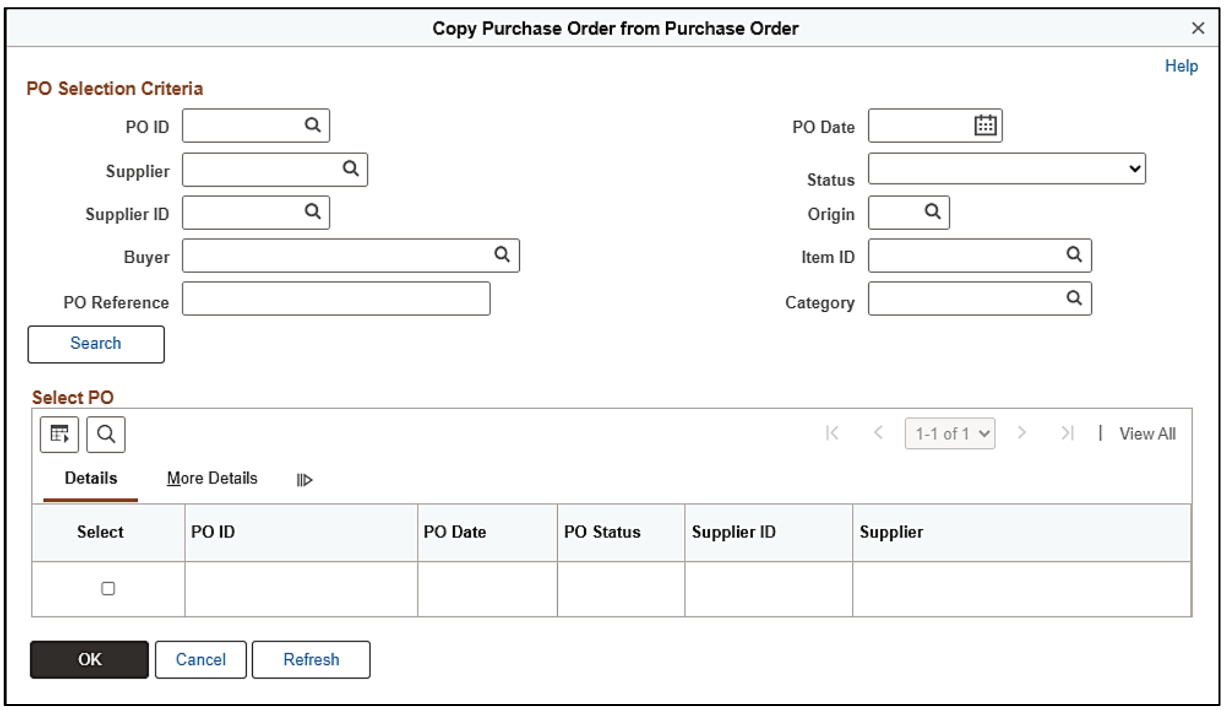
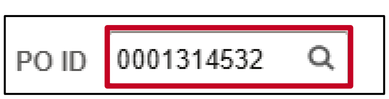
12. Click the **OK** button.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Purchase Order page redisplays, with the selected Contract Line copied to the Line.

</td></tr>
<tr><td>13.</td><td>Click the Add Multiple New Rows at Row 1 button to add new rows, and repeat Steps 8 - 12 to copy additional Contract Lines.
</td></tr>
<tr><td>14.</td><td>Click the Details tab.

</td></tr>
<tr><td>15.</td><td>Complete the Quantity, Price, Schedule, and Distribution for each Line by following Steps 20 - 30 of the <u>Creating an Ad hoc Purchase Order</u> section in this Job Aid.</td></tr>
<tr><td>16.</td><td>Save and submit the Purchase Order for approval by following Steps 31 - 33 of the <u>Creating an Ad hoc Purchase Order</u> section in this Job Aid.</td></tr>
<tr><td></td><td>A Purchase Order must be dispatched in order to be received or vouchered against. For instructions on manually dispatching a Purchase Order see the <u>Dispatching a Purchase Order</u> section in this Job Aid.</td></tr>
</table>

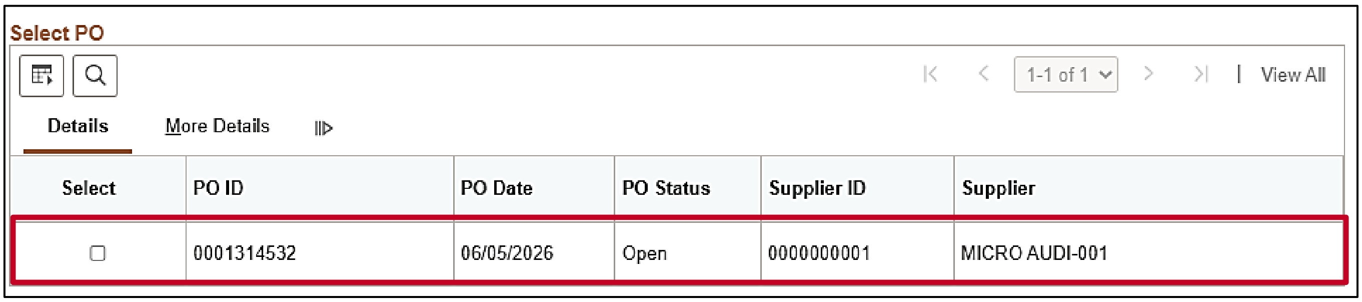
Copying From a Purchase Order

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Create a new Purchase Order by following Steps 1 - 3 of the <u>Creating an Ad hoc Purchase Order</u> section in this Job Aid.</td></tr>
<tr><td>2.</td><td>Click the Copy From dropdown button and select "Purchase Order".

</td></tr>
<tr><td colspan="2">The Copy Purchase Order from Purchase Order page displays.

</td></tr>
<tr><td>3.</td><td>Enter the Purchase Order ID Number for the Purchase Order to be copied from in the PO ID field.

</td></tr>
</table>

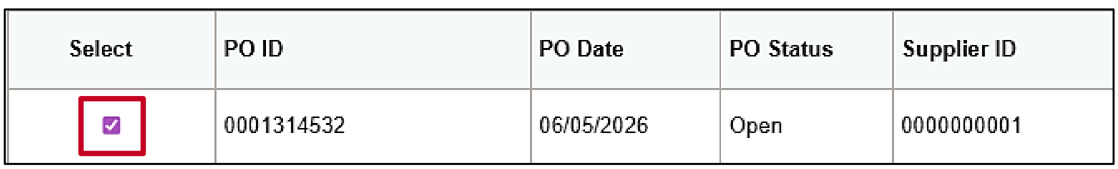
Step	Action
4.	Click the **Search** button.

The **Copy Purchase Order from Purchase Order** page redisplays, with the Purchase Order displayed in the **Select PO** section.



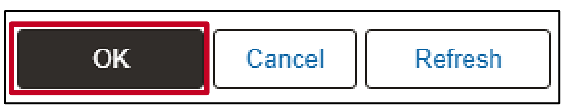
Select	PO ID	PO Date	PO Status	Supplier ID	Supplier
☐	0001314532	06/05/2026	Open	0000000001	MICRO AUDI-001

Step	Action
5.	Click the **Select** checkbox to the left of the Purchase Order to copy.

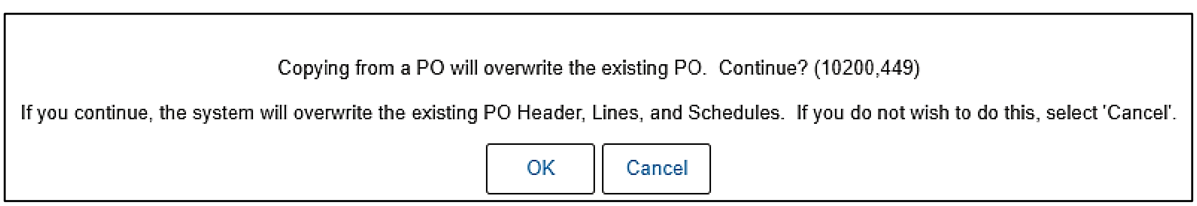


Select	PO ID	PO Date	PO Status	Supplier ID
☑	0001314532	06/05/2026	Open	0000000001

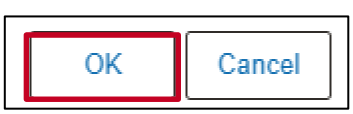
Step	Action
6.	Click the **OK** button.

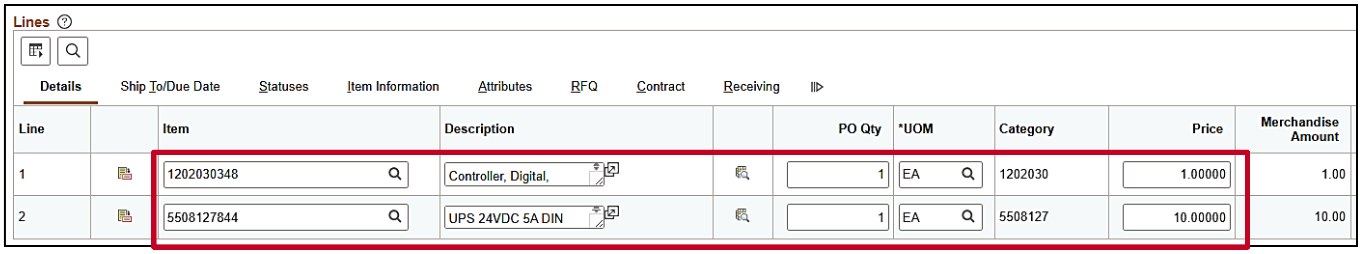


A **Message** may display in a pop-up window, warning that copying from another Purchase Order will overwrite any existing Header data, Lines, and Schedules.

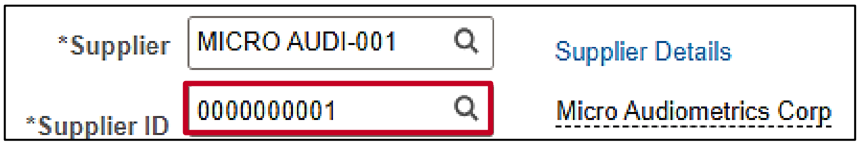


Step	Action
7.	Click the **OK** button.

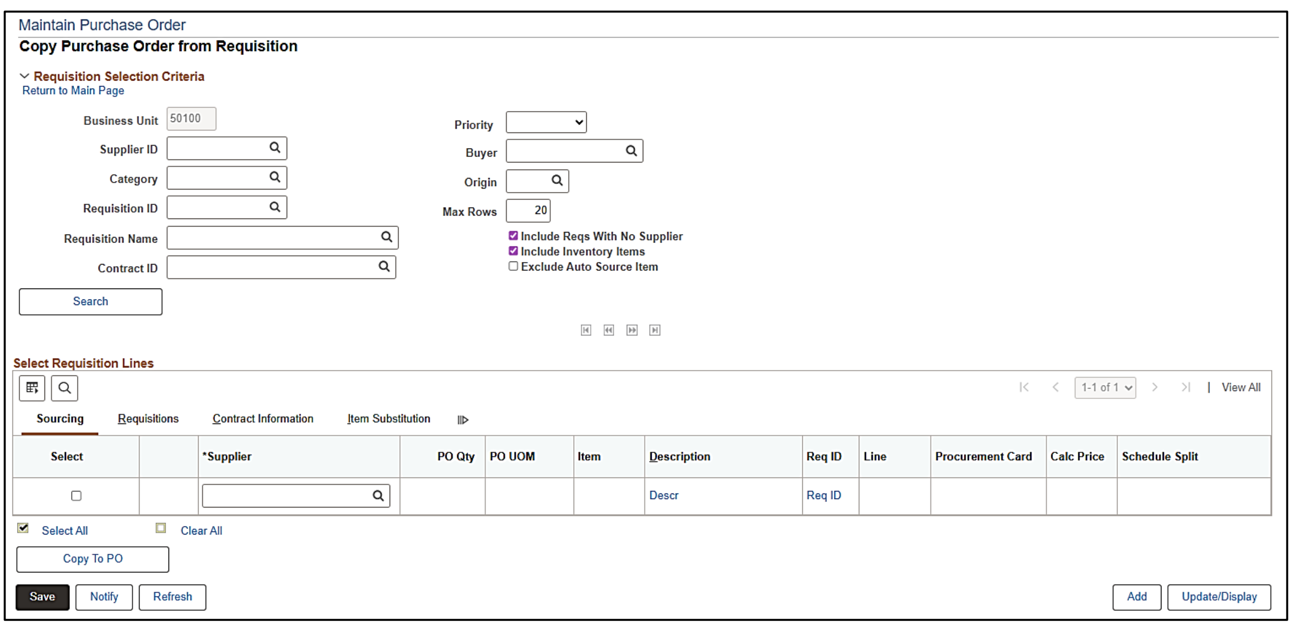


Step	Action
	The **Purchase Order** page redisplays with all lines from the selected Purchase Order copied to the **Lines** section. 
8.	Verify the billing address by following Steps 12 - 15 of the Creating an Ad hoc Purchase Order section in this Job Aid.
9.	Verify and update the Quantity, Price, Schedule, and Distribution for each Line by following Steps 20 - 30 of the Creating an Ad hoc Purchase Order section in this Job Aid.
	For instructions on setting accounting distribution field values for all lines, see the Setting Purchase Order Defaults section in this Job Aid.
10.	Save and submit the Purchase Order for approval by following Steps 31 - 33 of the Creating an Ad hoc Purchase Order section in this Job Aid.
	A Purchase Order must be approved and dispatched in order to be received or vouchered against. For instructions on manually dispatching a Purchase Order see the Dispatching a Purchase Order section in this Job Aid.

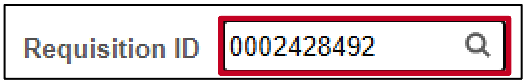
Copying From a Requisition

Step	Action
1.	Create a new Purchase Order by following Steps 1 - 3 of the Creating an Ad hoc Purchase Order section in this Job Aid.
2.	Enter the Supplier ID Number in the **Supplier ID** field. 
3.	Verify the Supplier address by following Steps 4 - 8 of the Creating an Ad hoc Purchase Order section in this Job Aid.
4.	Click the **Copy From** dropdown button and select "Requisition". 

The **Copy Purchase Order from Requisition** page displays.

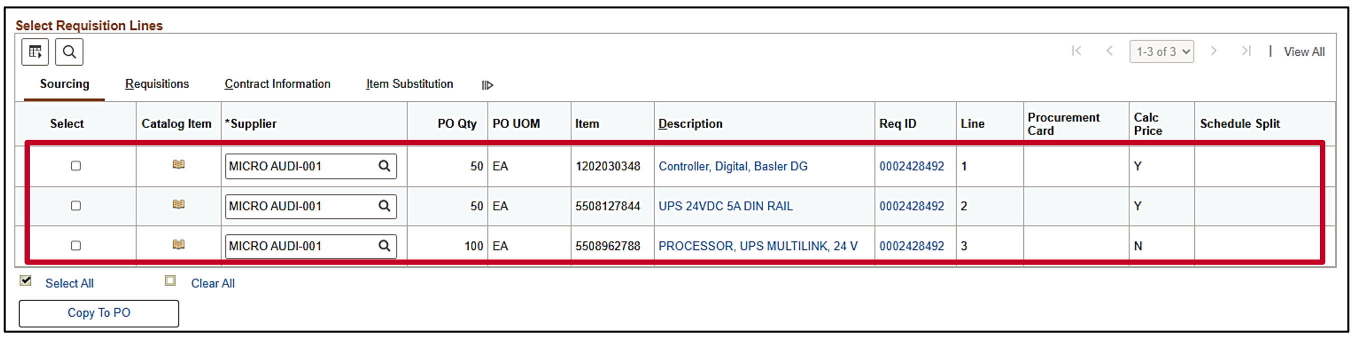


Step	Action
5.	Enter the Requisition ID Number in the **Requisition ID** field.



Step	Action
6.	Click the **Search** button.

The **Copy Purchase Order from Requisition** page refreshes with Requisition Line(s) populating the **Select Requisition Lines** section.



Select Requisition Lines

1-3 of 3 | View All

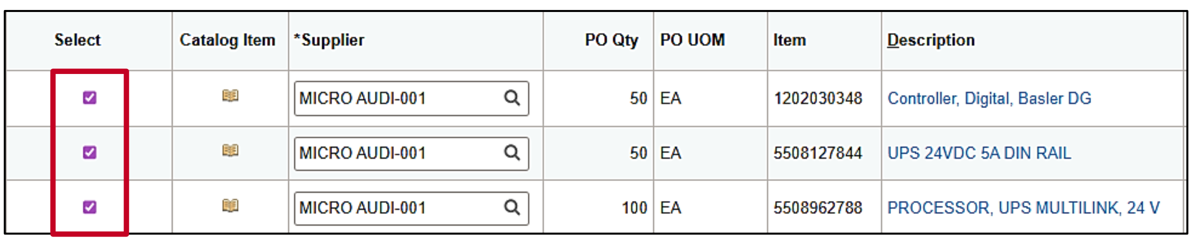
Sourcing | Requisitions | Contract Information | Item Substitution

Select	Catalog Item	*Supplier	PO Qty	PO UOM	Item	Description	Req ID	Line	Procurement Card	Calc Price	Schedule Split
☐		MICRO AUDI-001	50	EA	1202030348	Controller, Digital, Basler DG	0002428492	1		Y	
☐		MICRO AUDI-001	50	EA	5508127844	UPS 24VDC 5A DIN RAIL	0002428492	2		Y	
☐		MICRO AUDI-001	100	EA	5508962788	PROCESSOR, UPS MULTILINK, 24 V	0002428492	3		N	

Select All Clear All

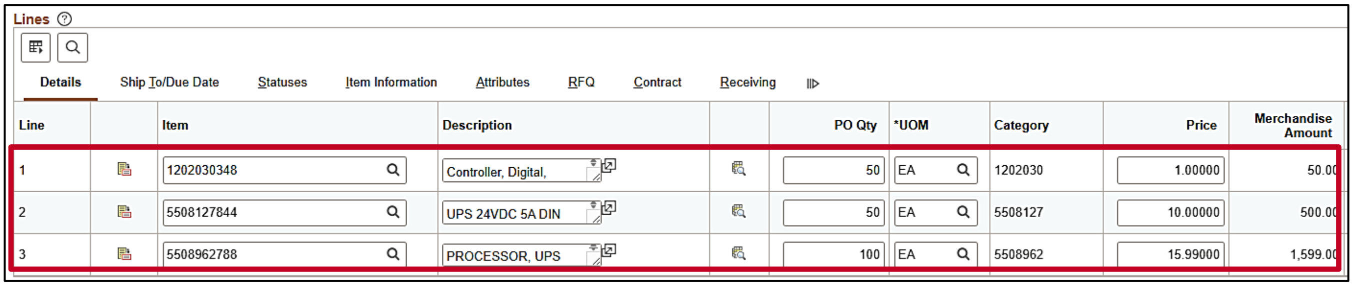
Copy To PO

Step	Action
7.	Click the **Select** checkbox next to the Requisition Line(s) to copy.



Select	Catalog Item	*Supplier	PO Qty	PO UOM	Item	Description
☑		MICRO AUDI-001	50	EA	1202030348	Controller, Digital, Basler DG
☑		MICRO AUDI-001	50	EA	5508127844	UPS 24VDC 5A DIN RAIL
☑		MICRO AUDI-001	100	EA	5508962788	PROCESSOR, UPS MULTILINK, 24 V

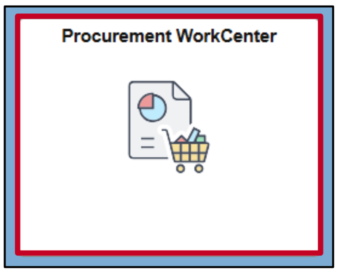
Step	Action
8.	Click the **Copy to PO** button.

Step	Action
	The **Purchase Order** page redisplays with the selected Requisition Line(s) copied to the Lines section. 
ℹ	For instructions on setting accounting distribution field values for all lines, see the Setting Purchase Order Defaults section in this Job Aid.
9.	Verify the billing address by following Steps 12 - 15 of the Creating an Ad hoc Purchase Order section in this Job Aid.
10.	Complete the Quantity, Price, Schedule, and Distribution for each Line by following Steps 20 - 30 of the Creating an Ad hoc Purchase Order section in this Job Aid.
11.	Save and submit the Purchase Order for approval by following Steps 31 - 33 of the Creating an Ad hoc Purchase Order section in this Job Aid.
ℹ	A Purchase Order must be dispatched in order to be received or vouchered against. For instructions on manually dispatching a Purchase Order see the Dispatching a Purchase Order section in this Job Aid.

Managing eVA Purchase Orders

An eVA Direct Order (DO) is a Purchase Order created in eVA. It is loaded directly into Cardinal, where a corresponding Cardinal Purchase Order is created and assigned a PO ID Number. This Purchase Order must then be updated with a Buyer name and a valid accounting distribution, which allows for receiving and vouchering to take place.

eVA Direct Orders (DOs) come into Cardinal with an Approved status. Material modifications (e.g., adding a line, changing quantities, changing prices) made to an eVA PO are done in eVA, not in Cardinal.

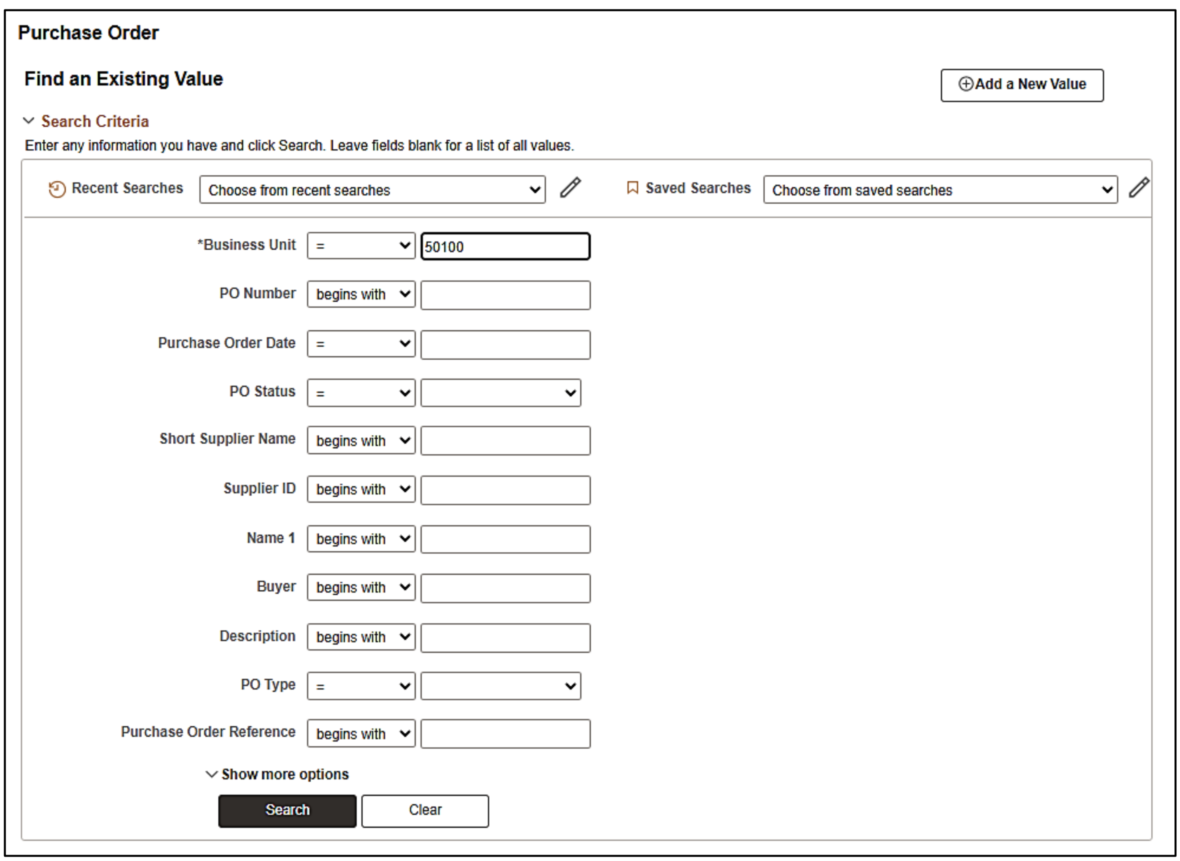
Step	Action
1.	Navigate to the **Purchase Order** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
	Use the following navigation in the WorkCenter: **Links > Purchase Order > Add/Update POs** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Purchase Order** page using the following navigation path: **NavBar** > **Menu** > **Purchasing** > **Purchase Orders** > **Add/Update POs**

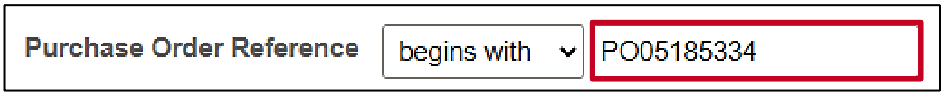
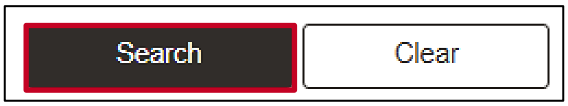
Step	Action

The **Purchase Order Add a New Value** page displays.

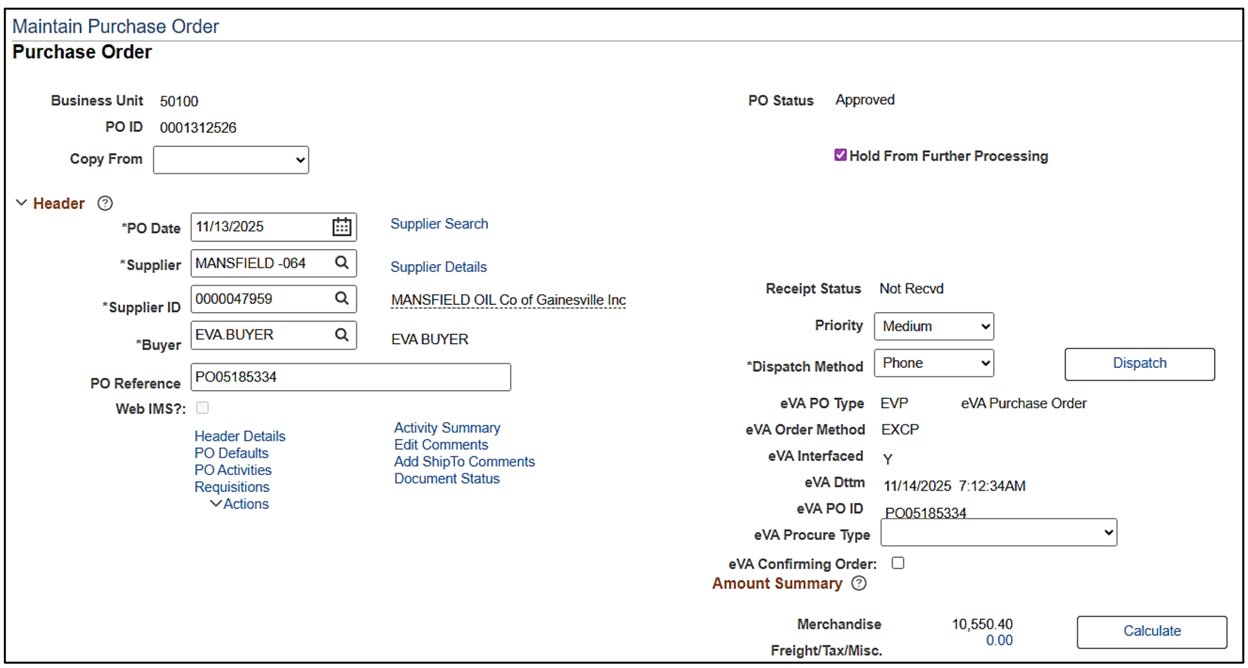
2. Click the **Find an Existing Value** button.

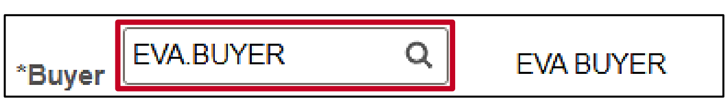
The **Purchase Order Find an Existing Value Search** page displays.

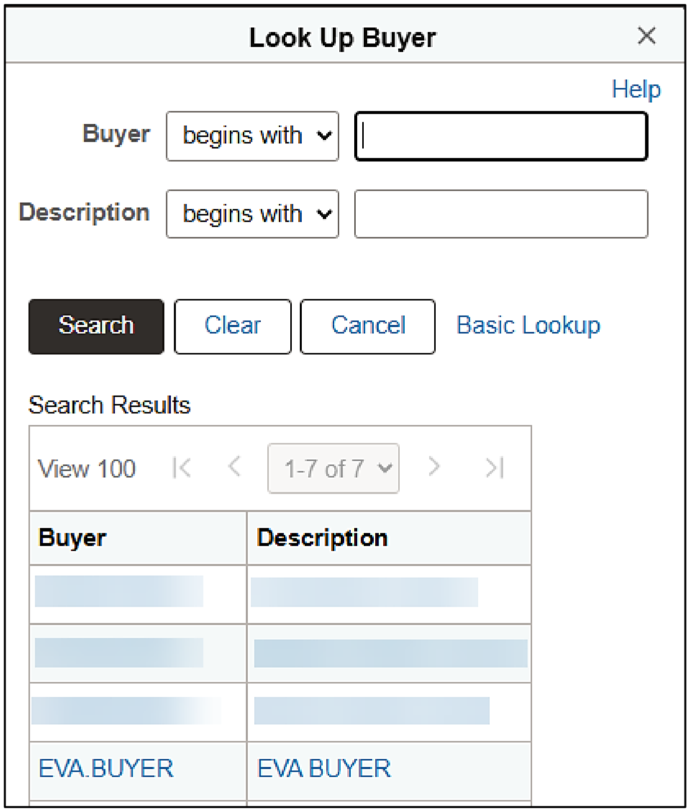
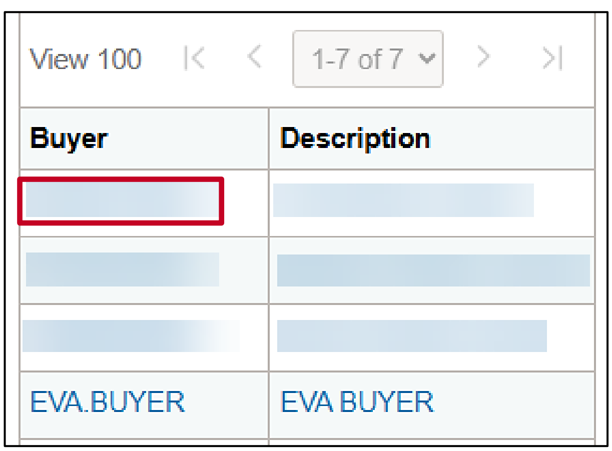


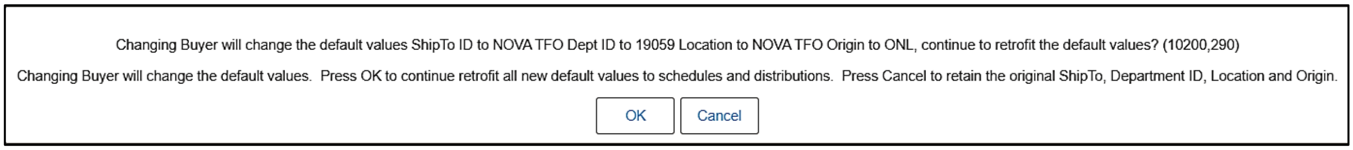
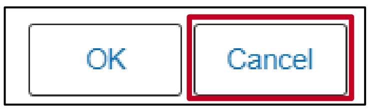
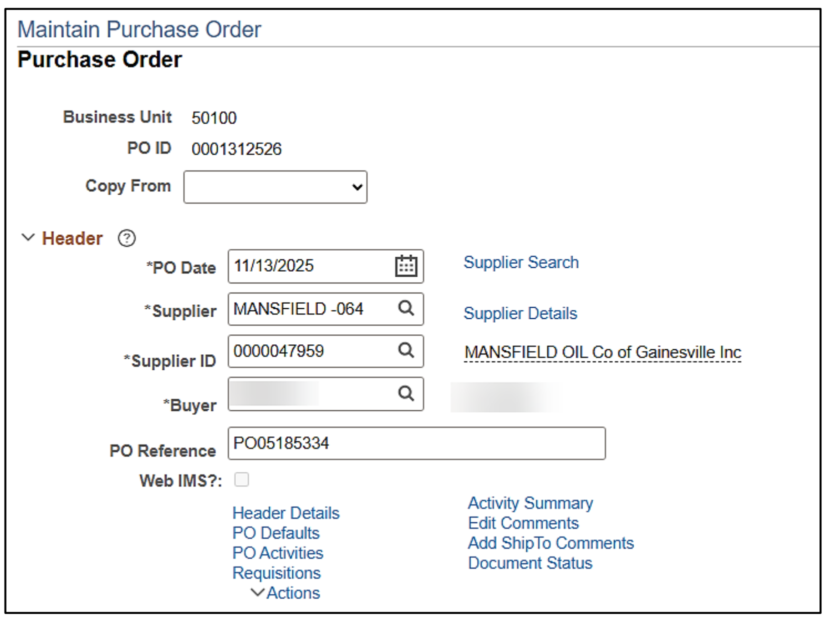
Step	Action
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
3.	Enter the eVA Purchase Order Number in the **Purchase Order Reference** field. 
4.	Click the **Search** button. 

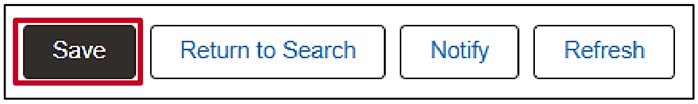
The **Purchase Order** page displays the eVA Purchase Order.



Step	Action
i	The Purchase Order is assigned the Buyer Name "EVA BUYER" when it is first loaded. The Buyer should update this name to their own name.
5.	Click the **Buyer Look up** icon. 

Step	Action
The **Look Up Buyer** page displays in a pop-up window. 	
6.	Click the **Buyer** link for the applicable Buyer. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">A Message displays, asking if the default Ship To, Department ID, Location, and Origin values should be changed.
</td></tr>
<tr><td>7.</td><td>Click the Cancel button to keep the values from the eVA Direct Order.
</td></tr>
<tr><td colspan="2">The Purchase Order page redisplays with the Buyer field updated.
</td></tr>
<tr><td>8.</td><td>Enter accounting distribution values in one of the following two ways:
Enter Purchase Order distribution defaults. For instructions, see the Setting Purchase Order Defaults section in this Job Aid
Enter accounting distribution values to individual lines. For instructions, see Steps 20 - 30 in the Creating an Ad hoc Purchase Order section in this Job Aid</td></tr>
<tr><td>9.</td><td>Deselect the Hold from Further Processing checkbox option.
</td></tr>
</table>

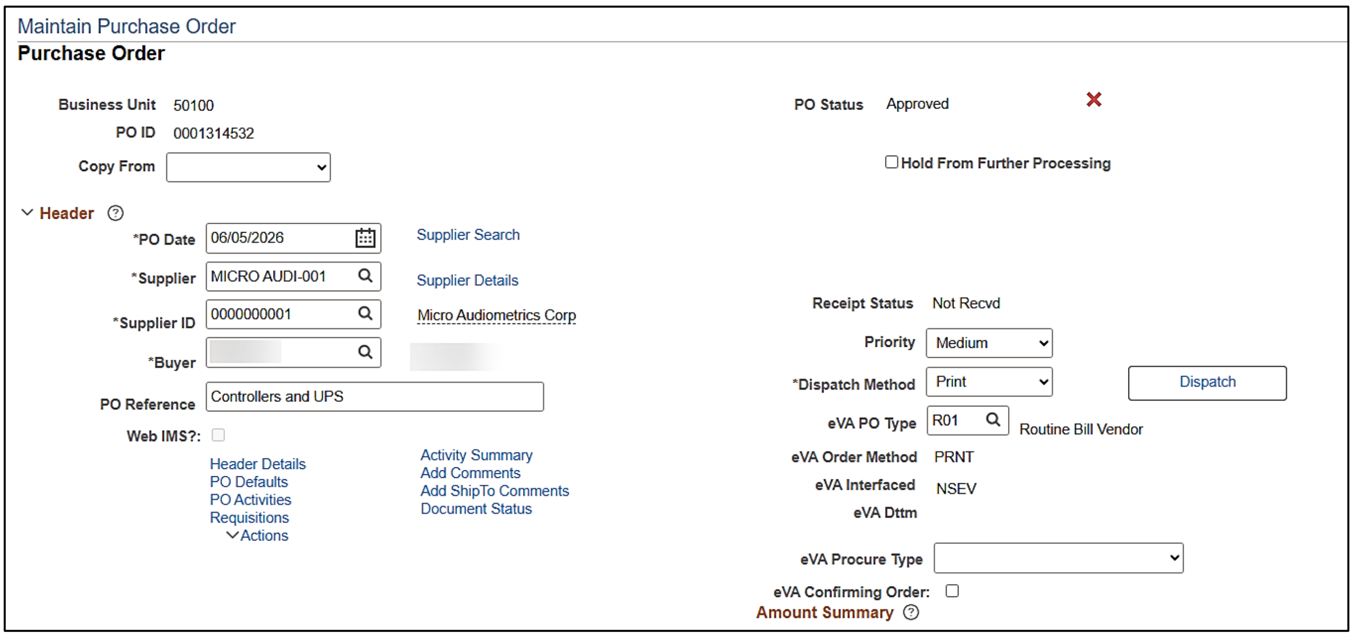
Step	Action
10.	Click the **Save** button. 
	An eVA Purchase Order must be dispatched in order to be received or vouchered against. For instructions on manually dispatching a Purchase Order see the Dispatching a Purchase Order section in this Job Aid.
	A dispatched PO flows to eVA for reporting purposes. If the Supplier is set up in eVA as URL dispatch, the PO is sent electronically to the Supplier. If not, the Buyer should print the PO and send it to the Supplier.

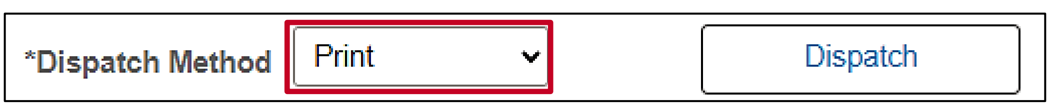
Dispatching a Purchase Order

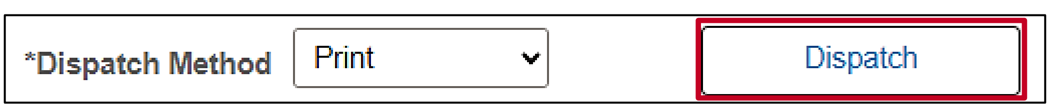
A Purchase Order must be dispatched in order to be received or vouchered against. A Purchase Order must be approved before it can be dispatched.

Upon approval, the Buyer receives an email and can navigate to the Purchase Order from a hyperlink. POs are dispatched automatically in batch periodically throughout the day, or a Buyer may choose to dispatch it manually.

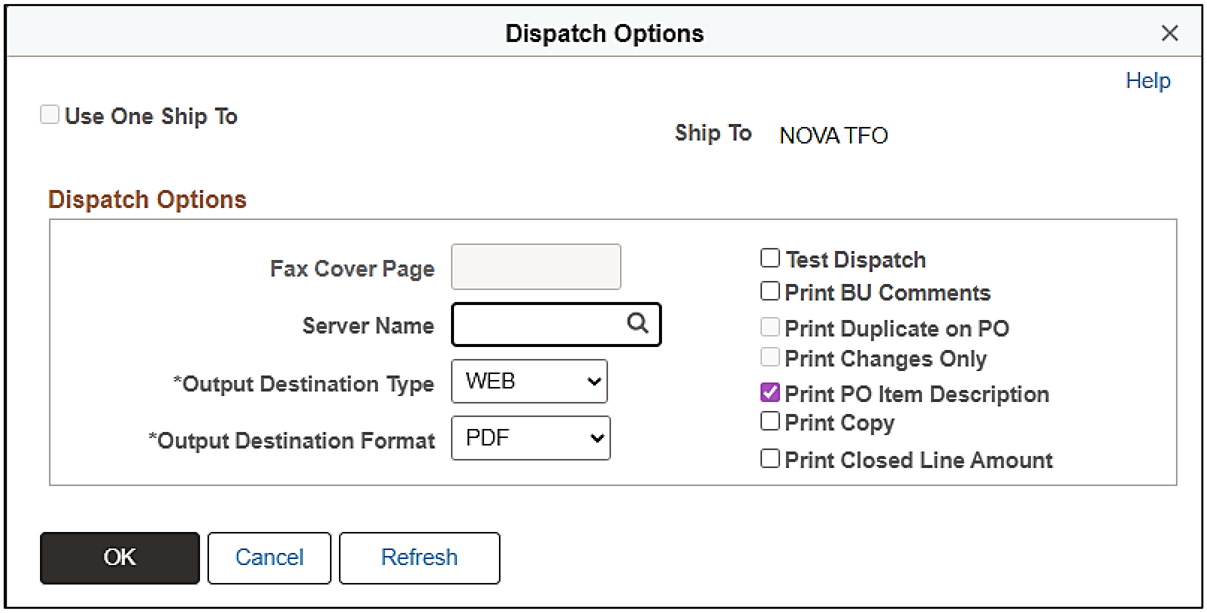
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Upon approval, the Buyer receives an email and can navigate to the Purchase Order from the hyperlink provided.</td></tr>
<tr><td colspan="2">The Purchase Order page displays, with the PO Status field updated to "Approved".


</td></tr>
<tr><td>2.</td><td>The Dispatch Method field defaults to "Print". Adjust if needed.

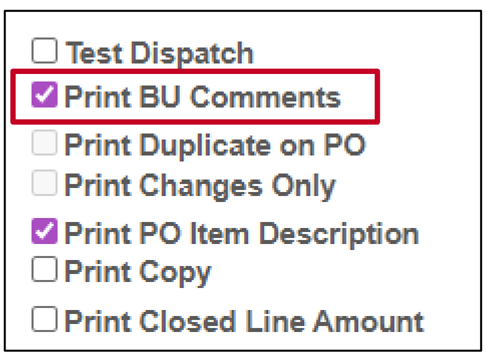

</td></tr>
<tr><td>3.</td><td>Click the Dispatch button.


</td></tr>
</table>

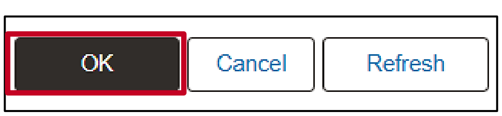
Step	Action
	The **Dispatch Options** page displays in a pop-up window.



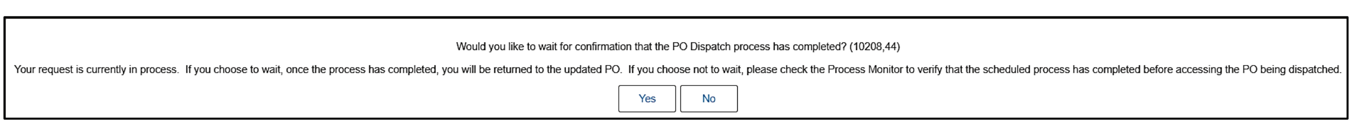
Step	Action
4.	Click the **Print BU Comments** checkbox option to include Line and Header comments, including eVA terms and conditions, on the Purchase Order to be sent to the Supplier.

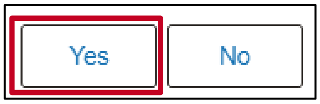
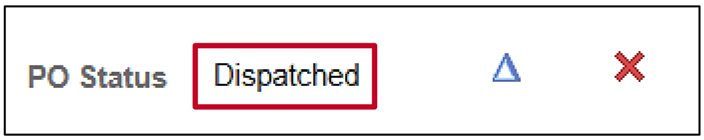


Step	Action
5.	Click the **OK** button.



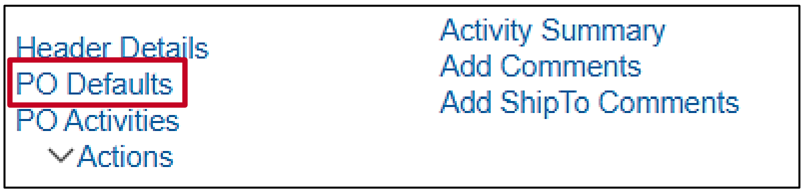
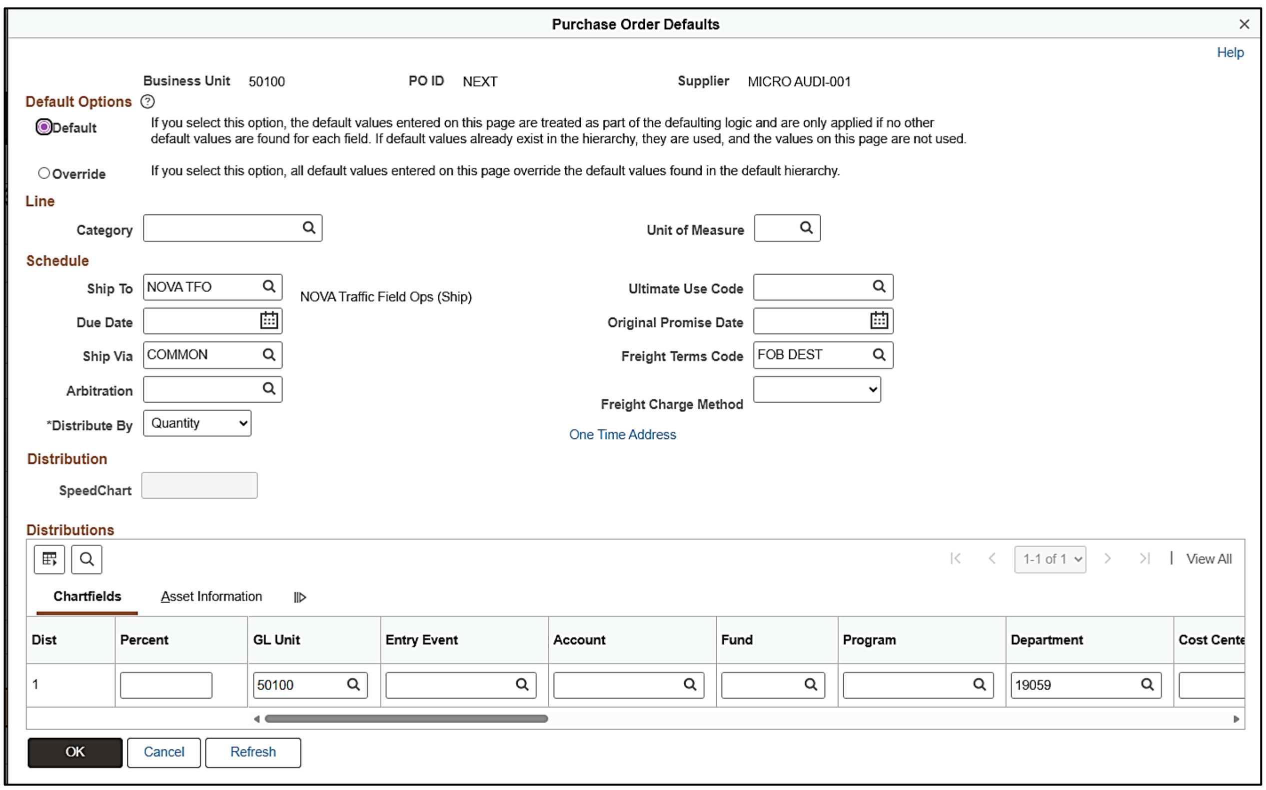
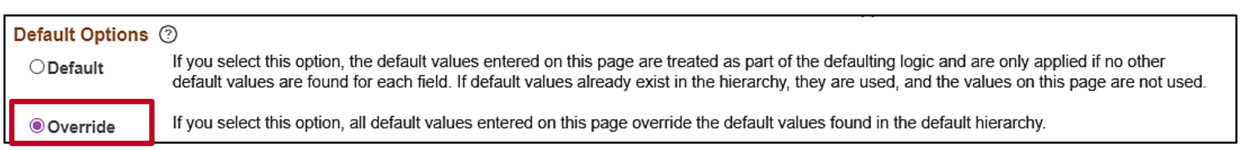
A **Message** displays in a pop-up window asking whether to wait for the PO Dispatch process to complete.

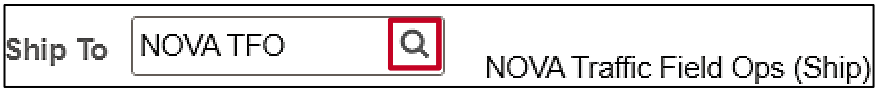
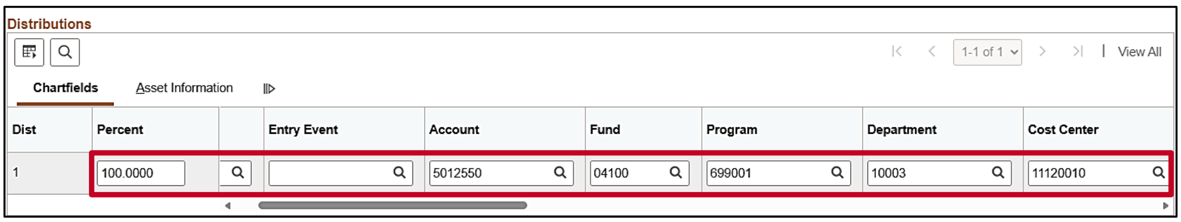


Step	Action
6.	Click the **Yes** button. 
7.	Once the PO Dispatch process has completed, the **Purchase Order** page redisplays with the **PO Status** field updated to "Dispatched". 

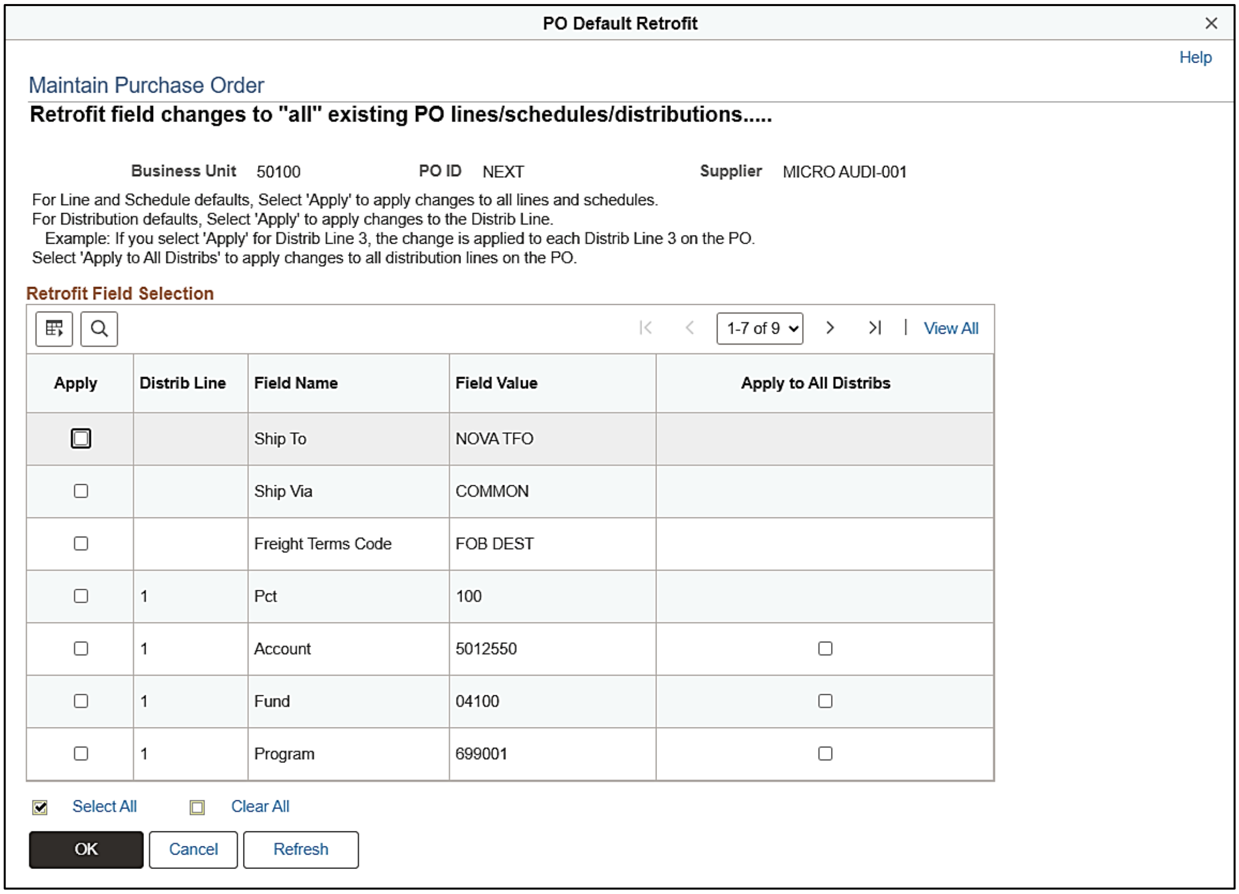
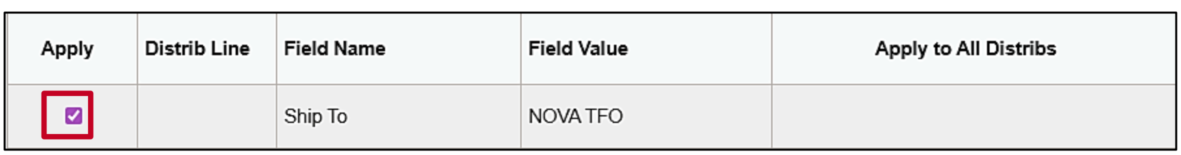
Setting Purchase Order Defaults

Use the **Purchase Order Defaults** page while creating a Purchase Order to make changes to the schedule and accounting distribution field values for all lines at the same time. This is especially useful when creating Purchase Orders with many Lines and the same accounting distributions.

Step	Action
1.	Click the **PO Defaults** link. 
The **Purchase Order Defaults** page displays in a pop-up window.  	
2.	Click the **Override** option to ensure that all distribution lines will be updated. 

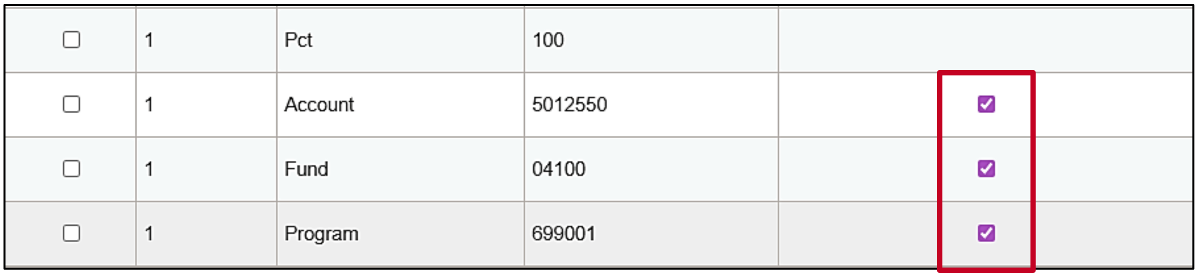
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3.</td><td>Click the Ship To Look up icon and select the applicable Ship To location.

</td></tr>
<tr><td>4.</td><td>Enter the accounting distribution to be applied to all Lines, in the Distributions section, on the Chartfields tab.

</td></tr>
<tr><td></td><td>If each distribution line will be different, enter them individually using Steps 26 - 30 in the <u>Creating an Ad hoc Purchase Order</u> section in this Job Aid.</td></tr>
<tr><td>5.</td><td>Click the OK button.

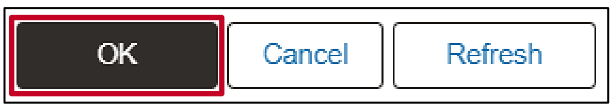
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">If Lines have already been entered on the Purchase Order, the PO Default Retrofit page displays.
</td></tr>
<tr><td>6.</td><td>Click the Apply checkbox option to the left of the Schedule field values being updated.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the Apply to All Distributions checkbox options to the right of the ChartField values, to ensure all the accounting distribution lines are updated with the new values.

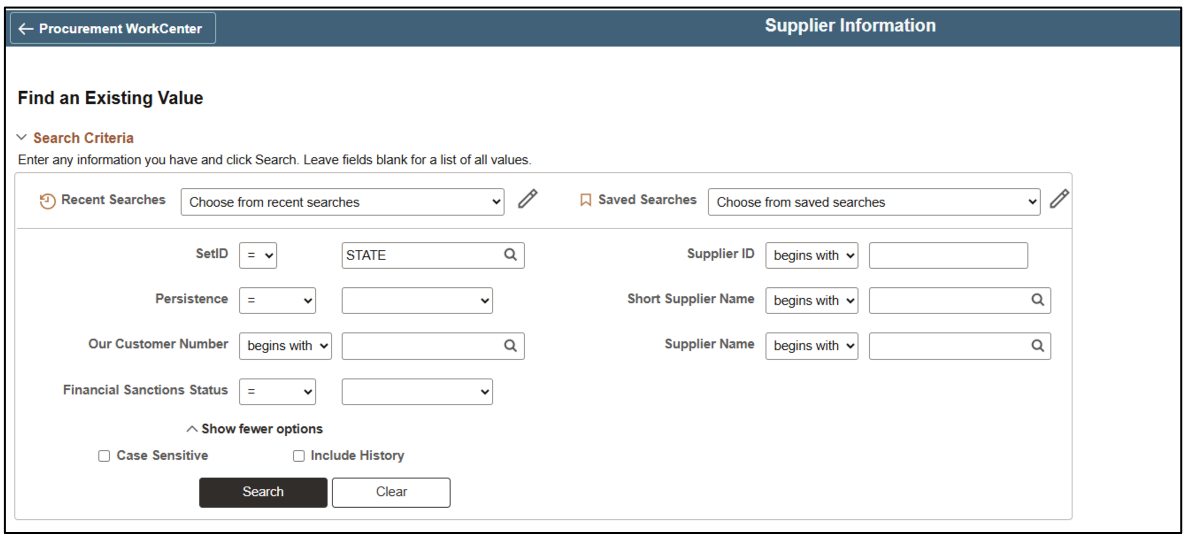
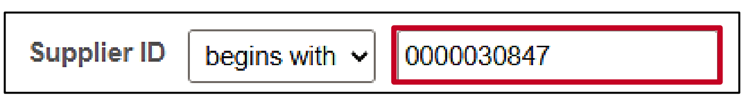
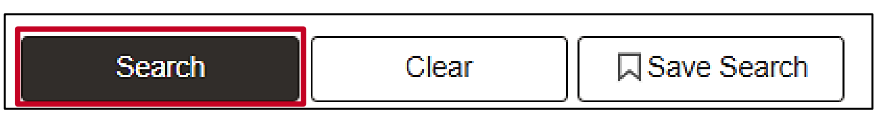
Do not click the checkbox option to the left of the Pct field name.


</td></tr>
<tr><td>8.</td><td>Click the OK button.

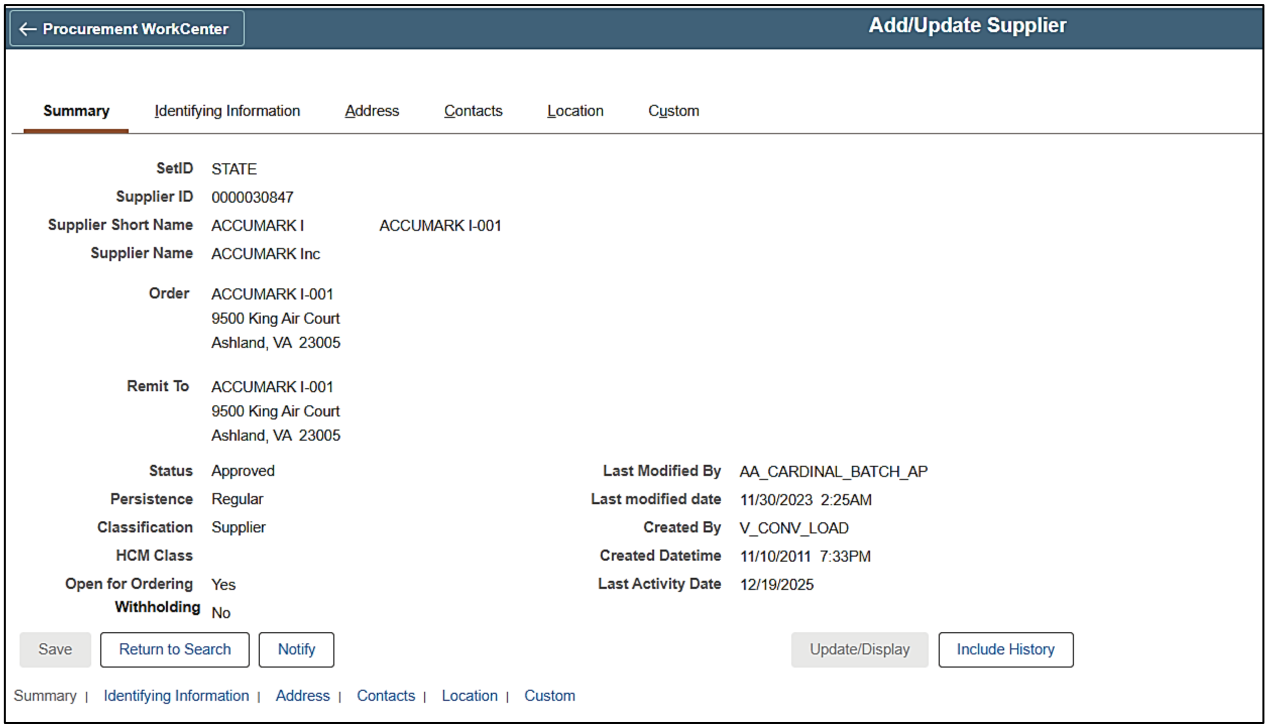

</td></tr>
</table>

Verifying Supplier Information

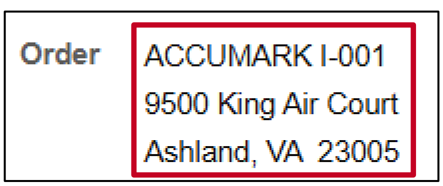
Supplier information is electronically transmitted from eVA into Cardinal. It is important to ensure that the eVA supplier and ordering address are correct on the PO. Before creating a PO, the user may wish to verify a supplier, address or other information for the new PO.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Supplier Information page using this path:
NavBar > Menu > Suppliers > Supplier Information > Add/Update > Add/Update Supplier</td></tr>
<tr><td colspan="2">The Supplier Information Find an Existing Value Search page displays.

</td></tr>
<tr><td>2.</td><td>Enter the applicable Supplier ID number in the Supplier ID field.

</td></tr>
<tr><td>3.</td><td>Click the Search button.

</td></tr>
</table>

Step	Action
	The **Add/Update Supplier** page displays.



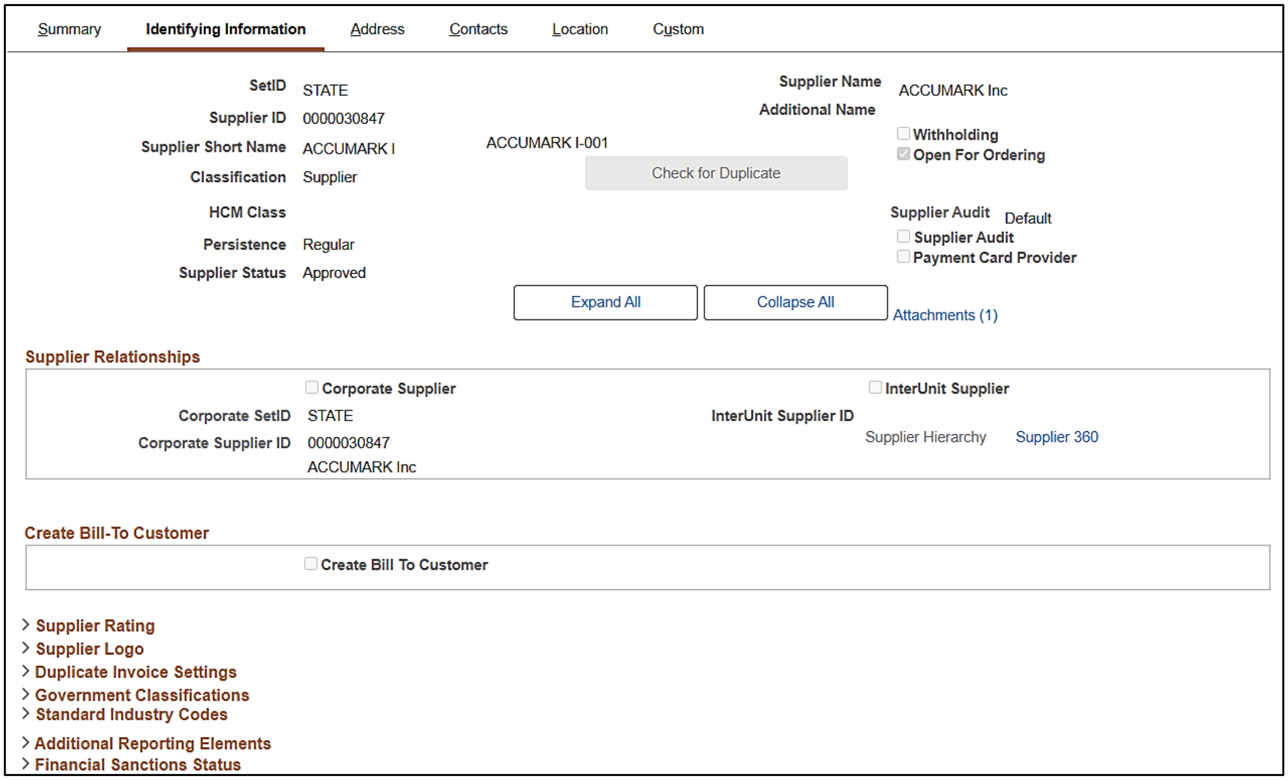
Step	Action
4.	Review the Supplier's default ordering address in the **Order** field.



Step	Action
5.	Click the **Identifying Information** tab.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Identifying Information** tab displays.

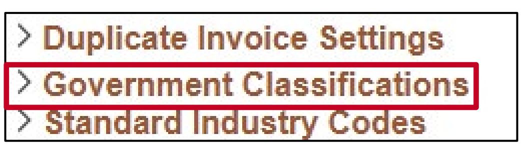


</td></tr>
<tr><td></td><td>

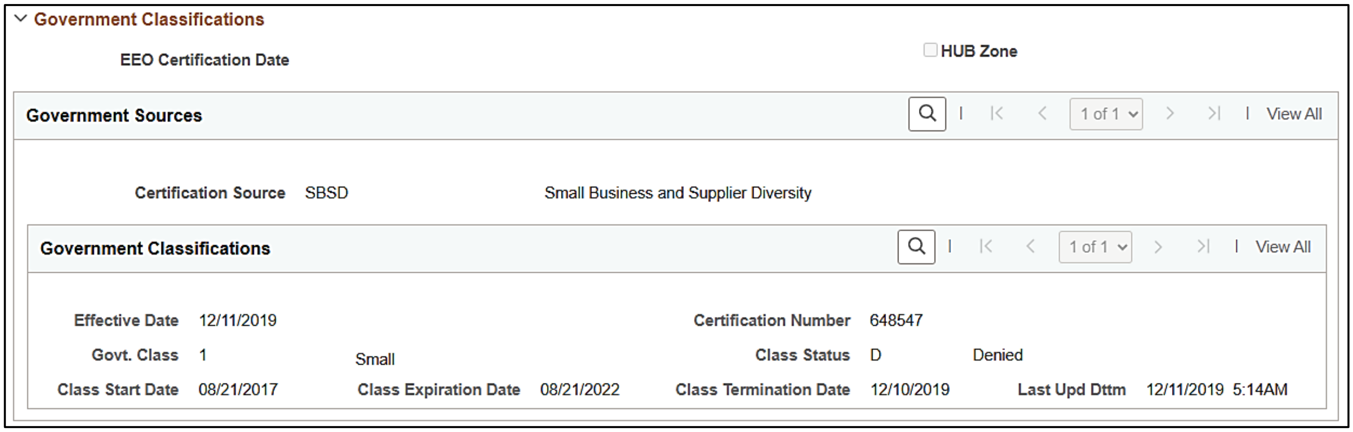
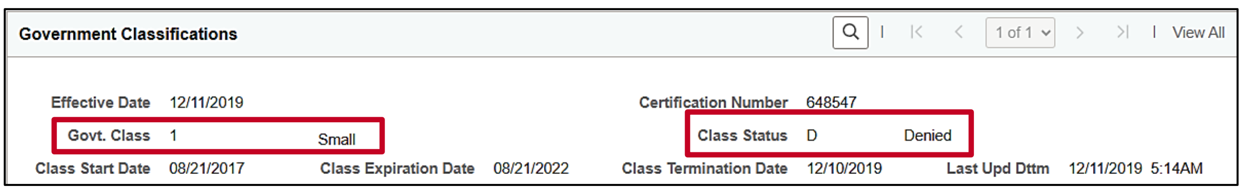
To view the supplier’s Virginia Department of Small Business and Supplier Diversity (SBSD) classification, expand the **Government Classifications** section.

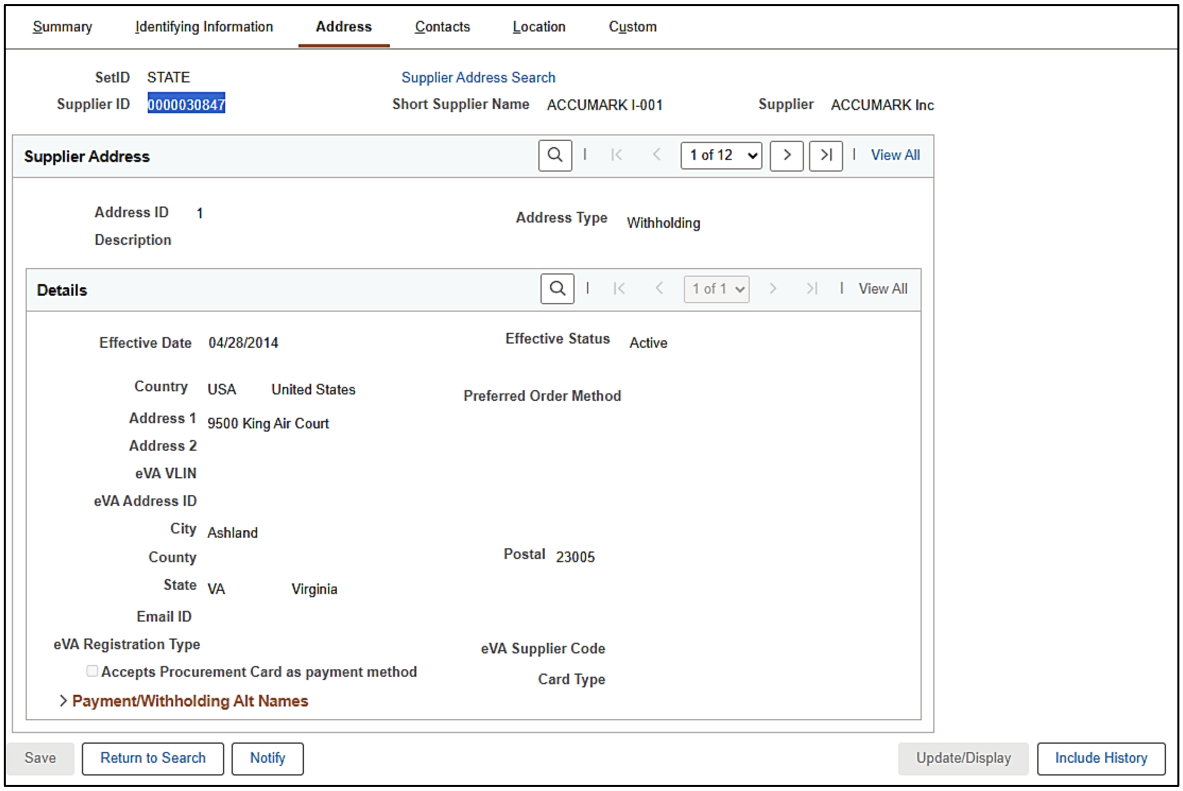
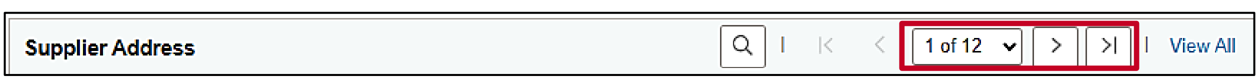
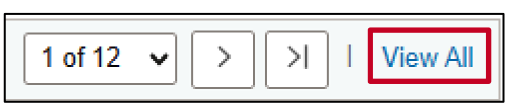
</td></tr>
<tr><td>6.</td><td>

Click the **Government Classifications Expand** icon (**>**).



</td></tr>
</table>

Step	Action
	The **Government Classifications** section displays. 
7.	Review the **Govt. Class** field and the **Class Status** field. 
8.	Click the **Address** tab. 

Step	Action
	The **Address** tab displays. 
9.	Find the applicable ordering address for the Purchase Order by using the left and right arrow buttons to scroll through the addresses. 
	Another option is to click the **View All** link to show all addresses on the page at once. 
10.	Take note of the **Address ID** number for the address to use on the Purchase Order.