

LAST REVISED DATE: 03/21/2018

General Information

Task	Process Information
<p>Associating a Contract to a Dispatched PO</p> <p>Note: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>The association of Contracts to PO line(s) gives the Judiciary the ability to accurately track expenses against contracts.</p>

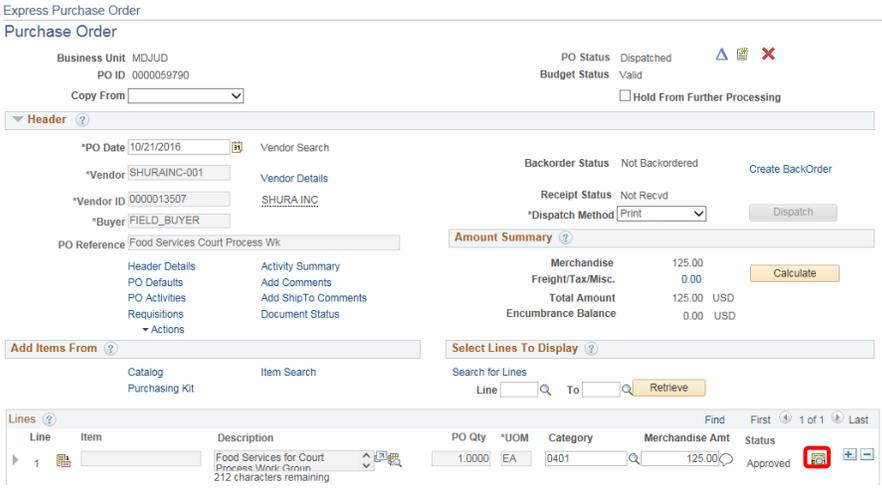
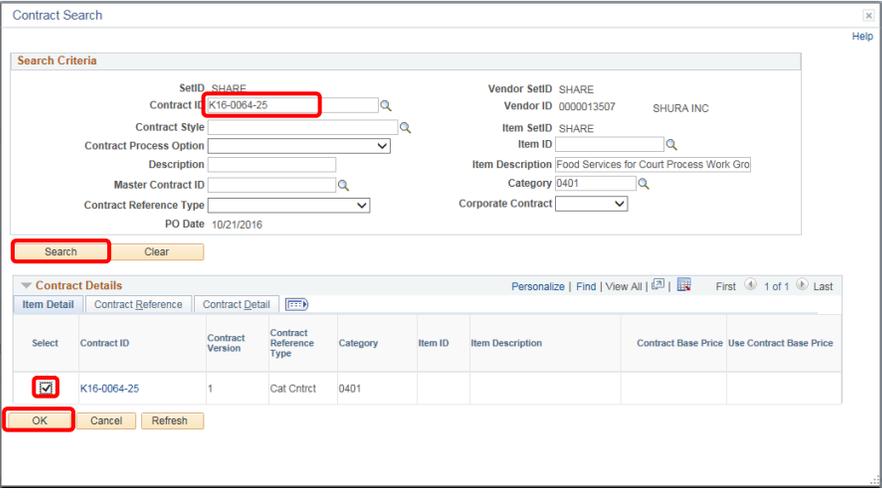
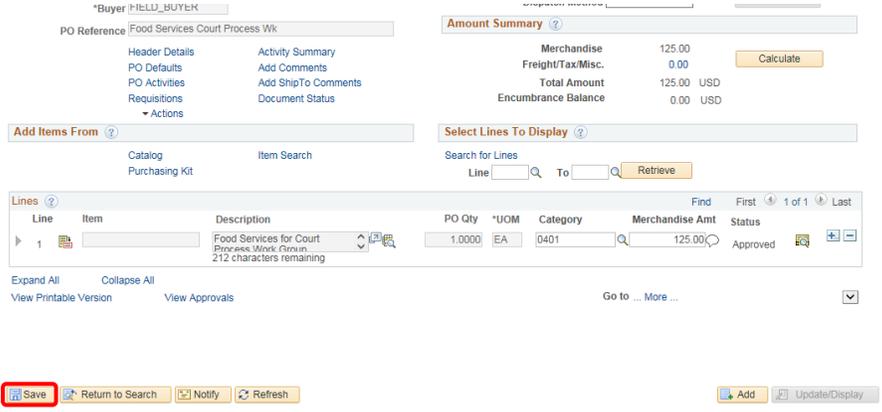
GEARS Navigation

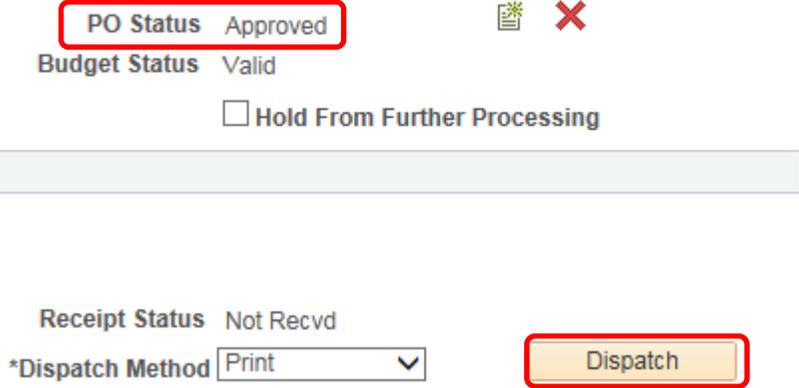
Purchasing > Purchase Orders > Add/Update Express POs	
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Process

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

STEP	ACTION	DETAILS
1.	<p>Select the Find an Existing Value tab. Enter the PO number and click </p>	

<p>2.</p> <p>Click on the Contract Search icon , on the PO line(s) that you want to associate with a contract.</p>	 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 000059790</p> <p>PO Status Dispatched Budget Status Valid</p> <p>Copy From <input type="text"/></p> <p>Header</p> <p>*PO Date 10/21/2016 Vendor Search</p> <p>*Vendor SHURAINC-001 Vendor Details</p> <p>*Vendor ID 000013507 SHURA INC</p> <p>*Buyer FIELD_BUYER</p> <p>PO Reference Food Services Court Process Wk</p> <p>Header Details Activity Summary PO Defaults Add Comments PO Activities Add ShipTo Comments Requisitions Document Status Actions</p> <p>Amount Summary</p> <table border="1"> <tr><td>Merchandise</td><td>125.00</td></tr> <tr><td>Freight/Tax/Misc.</td><td>0.00</td></tr> <tr><td>Total Amount</td><td>125.00 USD</td></tr> <tr><td>Encumbrance Balance</td><td>0.00 USD</td></tr> </table> <p>Add Items From <input type="text"/></p> <p>Select Lines To Display <input type="text"/></p> <p>Search for Lines Line <input type="text"/> To <input type="text"/> 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>Food Services for Court Process Work Process Work Item 212 characters remaining</td> <td>1.0000</td> <td>EA</td> <td>0401</td> <td>125.00</td> <td>Approved</td> </tr> </tbody> </table>	Merchandise	125.00	Freight/Tax/Misc.	0.00	Total Amount	125.00 USD	Encumbrance Balance	0.00 USD	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Food Services for Court Process Work Process Work Item 212 characters remaining	1.0000	EA	0401	125.00	Approved
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<p>3.</p> <p>Enter the Contract number and click Search.</p> <p>Note: You can also search for the contract by clicking on the search icon .</p> <p>Select the contract line by checking the box <input checked="" type="checkbox"/> and then click OK.</p>	 <p>Contract Search</p> <p>Search Criteria</p> <p>SetID SHARE</p> <p>Contract ID K16-0064-25</p> <p>Contract Style <input type="text"/></p> <p>Contract Process Option <input type="text"/></p> <p>Description <input type="text"/></p> <p>Master Contract ID <input type="text"/></p> <p>Contract Reference Type <input type="text"/></p> <p>PO Date 10/21/2016</p> <p>Vendor SetID SHARE</p> <p>Vendor ID 000013507 SHURA INC</p> <p>Item SetID SHARE</p> <p>Item ID <input type="text"/></p> <p>Item Description Food Services for Court Process Work Gro</p> <p>Category 0401</p> <p>Corporate Contract <input type="text"/></p> <p>Search Clear</p> <p>Contract Details</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Contract ID</th> <th>Contract Version</th> <th>Contract Reference Type</th> <th>Category</th> <th>Item ID</th> <th>Item Description</th> <th>Contract Base Price</th> <th>Use Contract Base Price</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>K16-0064-25</td> <td>1</td> <td>Cat Cntrct</td> <td>0401</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>OK Cancel Refresh</p>	Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price	<input checked="" type="checkbox"/>	K16-0064-25	1	Cat Cntrct	0401										
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<p>4.</p> <p>Click Save.</p> <p>Note: Please repeat the above steps for all lines on a multi-line PO.</p>	 <p>*Buyer FIELD_BUYER</p> <p>PO Reference Food Services Court Process Wk</p> <p>Amount Summary</p> <table border="1"> <tr><td>Merchandise</td><td>125.00</td></tr> <tr><td>Freight/Tax/Misc.</td><td>0.00</td></tr> <tr><td>Total Amount</td><td>125.00 USD</td></tr> <tr><td>Encumbrance Balance</td><td>0.00 USD</td></tr> </table> <p>Add Items From <input type="text"/></p> <p>Select Lines To Display <input type="text"/></p> <p>Search for Lines Line <input type="text"/> To <input type="text"/> 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>Food Services for Court Process Work Process Work Item 212 characters remaining</td> <td>1.0000</td> <td>EA</td> <td>0401</td> <td>125.00</td> <td>Approved</td> </tr> </tbody> </table> <p>Expand All Collapse All View Printable Version View Approvals</p> <p>Go to ... More ...</p> <p>Save Return to Search Notify Refresh</p> <p>Add Update/Display</p>	Merchandise	125.00	Freight/Tax/Misc.	0.00	Total Amount	125.00 USD	Encumbrance Balance	0.00 USD	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Food Services for Court Process Work Process Work Item 212 characters remaining	1.0000	EA	0401	125.00	Approved
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5.	If the PO Status reverted back to "Approved", you will need to  the PO again.	 <p>The screenshot shows a web interface for PO management. At the top, 'PO Status' is set to 'Approved' and is highlighted with a red box. To its right are a document icon and a red 'X' icon. Below this, 'Budget Status' is 'Valid'. A checkbox for 'Hold From Further Processing' is present and unchecked. A horizontal grey bar separates this section from the next. At the bottom, 'Receipt Status' is 'Not Recvd'. '*Dispatch Method' is set to 'Print' in a dropdown menu. A 'Dispatch' button is highlighted with a red box.</p>
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You've completed the steps necessary to associate a Contract to a PO line.



End of Document
