

Entering POCO for Services PO

What you need to know:

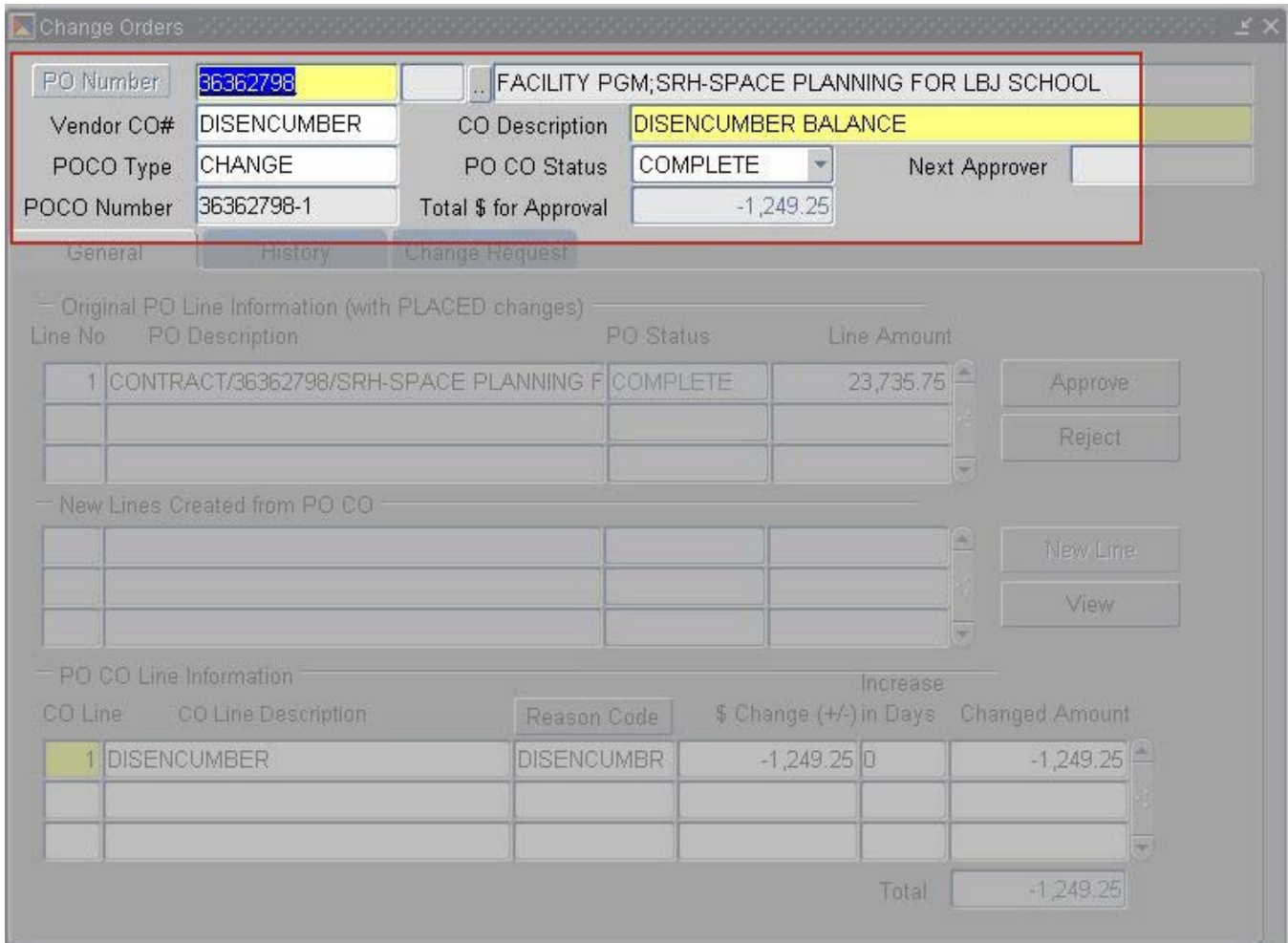
- a) PO should be in PLACED status. If PO is in COMPLETED status, please send an email to worqs@austin.utexas.edu to help with this process.
- b) This process is to either increase or decrease the PO amount.
- c) This process includes changing a current line and adding a new line. Not every PO will require a Change Order for both.
- d) This process is for SERVICE POs only. INVENTORY POs require a different process to change the amount.

PROCEDURE:

PO Change Order Form

1. Open the PO Change Order form.

Entering POCO for Services PO



The screenshot shows the 'Change Orders' window with the following details:

- PO Number:** 36362798
- Vendor CO#:** DISENCUMBER
- POCO Type:** CHANGE
- POCO Number:** 36362798-1
- CO Description:** DISENCUMBER BALANCE
- PO CO Status:** COMPLETE
- Total \$ for Approval:** -1,249.25

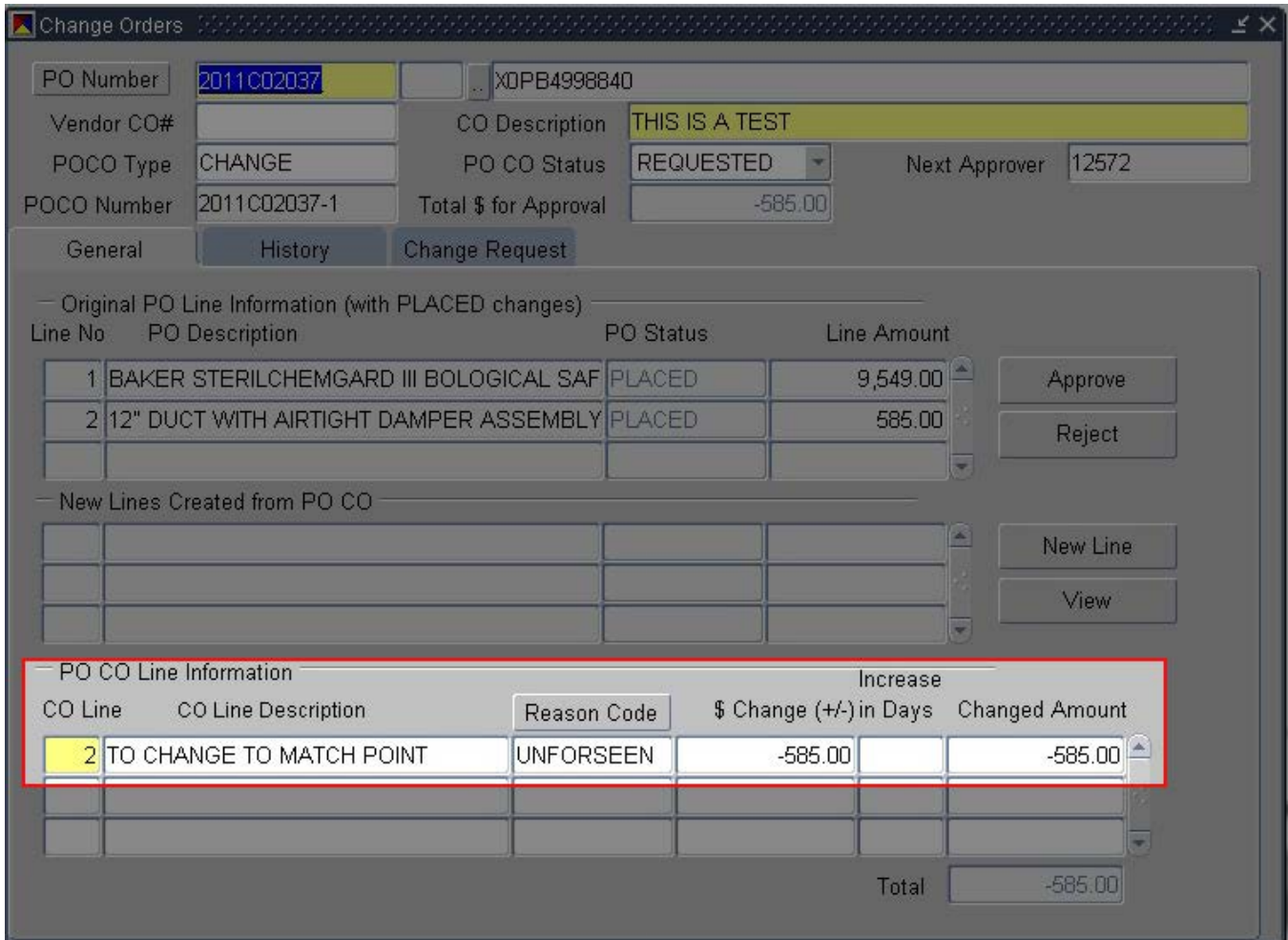
The interface also displays a table for 'Original PO Line Information (with PLACED changes)' and a table for 'PO CO Line Information'.

Line No	PO Description	PO Status	Line Amount
1	CONTRACT/36362798/SRH-SPACE PLANNING F	COMPLETE	23,735.75

CO Line	CO Line Description	Reason Code	\$ Change (+/-) in Days	Charged Amount
1	DISENCUMBER	DISENCUMBR	-1,249.25 0	-1,249.25
Total				-1,249.25

2. **PO Number** - Enter PO Number.
3. **Vendor CO#** - Use departmental business rules for entering the CO#.
4. **CO Description** – Use departmental business rules for CO Description.
5. **POCO Type** – Should be CHANGE.
6. **PO CO Status** – Should be in PLACED status.
7. **POCO Number** – The default is PO Number – number of POCOs.

Entering POCO for Services PO

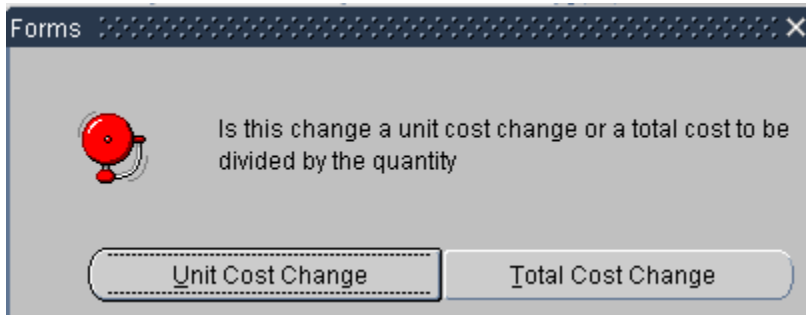


Change Orders window showing PO Number 2011CO2037, Vendor CO# XDPB4998840, CO Description THIS IS A TEST, PO CO Status REQUESTED, and Total \$ for Approval -585.00.

Line No	PO Description	PO Status	Line Amount
1	BAKER STERILCHEMGARD III BIOLOGICAL SAF	PLACED	9,549.00
2	12" DUCT WITH AIRTIGHT DAMPER ASSEMBLY	PLACED	585.00

CO Line	CO Line Description	Reason Code	\$ Change (+/-) in Days	Changed Amount
2	TO CHANGE TO MATCH POINT	UNFORSEEN	-585.00	-585.00
Total				-585.00

8. **CO Line** – Enter the line number that needs to be changed.
9. **CO Line Description** – Use the departmental business rules for entering the description.
10. **Reason Code** – Select the reason for the POCO.
11. **\$ Change** – Enter dollar amount that needs to be adjusted.



Forms dialog box with a red alarm icon and the question: "Is this change a unit cost change or a total cost to be divided by the quantity".

Two buttons are visible: "Unit Cost Change" and "Total Cost Change".

12. Select appropriate cost change. *Note: Usually service POs would be a 'Total Cost Change' and inventory POs would be a 'Unit Cost Change'.*

Entering POCO for Services PO

The screenshot shows the 'Change Orders' application window. At the top, the PO Number is 2011C02037 and the Vendor CO# is XDPB4998840. The CO Description is 'THIS IS A TEST'. The POCO Type is 'CHANGE' and the PO CO Status is 'REQUESTED'. The Next Approver is 12572. The POCO Number is 2011C02037-1 and the Total \$ for Approval is 715.00. Below this, there are tabs for 'General', 'History', and 'Change Request'. The 'Change Request' tab is active, showing a table of line items. The table has columns for Line No, PO Description, PO Status, and Line Amount. There are three lines: Line 1 (BAKER STERILCHEMGARD III BIOLOGICAL SAF, PLACED, 9,549.00), Line 2 (12" DUCT WITH AIRTIGHT DAMPER ASSEMBLY, PLACED, 585.00), and Line 3 (THIS IS WHERE YOU WOULD ADD NEW DESC, APPROVED, 1,300.00). To the right of the table, there are buttons for 'Approve', 'Reject', and 'New Line' (highlighted with a red box). Below the table, there is a section for 'New Lines Created from PO CO' and a section for 'PO CO Line Information' with columns for CO Line, CO Line Description, Reason Code, \$ Change (+/-) in Days, and Changed Amount. The total change is -585.00.

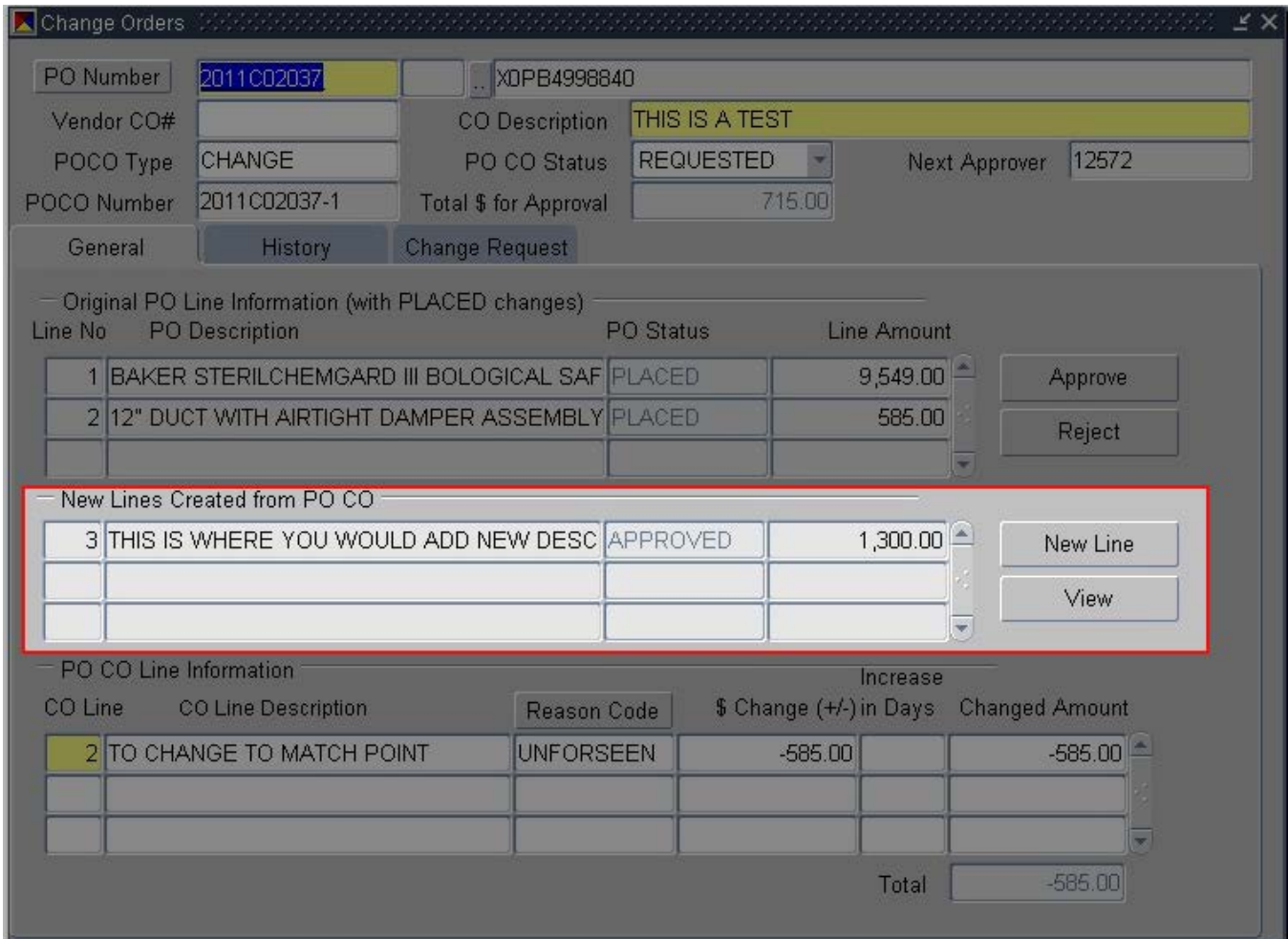
13. To add a new line, click on 'New Line' button.

The screenshot shows the 'Line Item' dialog box. It has three main sections: 'General Information', 'Status & Dates', and 'Cost Information'. In 'General Information', Line No is 4, Purchase Req is empty, Line is empty, and WO Number is 36822418. In 'Status & Dates', Required is MON MAR 14, 2011 and Promised is MON MAR 14, 2011. In 'Cost Information', Quantity is 1.00, Unit Price is 1,300.00, and Amount is 1,300.00. At the bottom, there are 'OK' and 'Cancel' buttons.

i) **WO Number** – Enter WO number.

Entering POCO for Services PO

- ii) **Description** – Enter description for adding new line.
- iii) **Required** – Add required date.
- iv) **Promised** – Add promised date.
- v) **Quantity** – Add quantity.
- vi) **Unit Price** – Add the Unit Price.
- vii) Click on OK.



The screenshot shows the 'Change Orders' application window. At the top, the PO Number is 2011C02037 and the Vendor CO# is XDPB4998840. The CO Description is 'THIS IS A TEST'. The PO CO Type is 'CHANGE' and the PO CO Status is 'REQUESTED'. The Next Approver is 12572. The POCO Number is 2011C02037-1 and the Total \$ for Approval is 715.00.

Below the header, there are tabs for 'General', 'History', and 'Change Request'. The 'Original PO Line Information (with PLACED changes)' table is as follows:

Line No	PO Description	PO Status	Line Amount
1	BAKER STERILCHEMGARD III BIOLOGICAL SAF	PLACED	9,549.00
2	12" DUCT WITH AIRTIGHT DAMPER ASSEMBLY	PLACED	585.00

The 'New Lines Created from PO CO' section is highlighted with a red box and contains the following table:

Line No	PO Description	PO Status	Line Amount
3	THIS IS WHERE YOU WOULD ADD NEW DESC	APPROVED	1,300.00

Buttons for 'Approve', 'Reject', 'New Line', and 'View' are visible next to the table rows.

At the bottom, the 'PO CO Line Information' table shows the change for line 2:

CO Line	CO Line Description	Reason Code	\$ Change (+/-) in Days	Increased	Changed Amount
2	TO CHANGE TO MATCH POINT	UNFORSEEN	-585.00		-585.00
Total					-585.00

14. New Lines Created from PO CO – You will see the new line that was added here. The PO Status will default to APPROVED.

Entering POCO for Services PO

The screenshot shows the 'Change Orders' window with the following details:

- PO Number: 2011C02037
- Vendor CO#: [Empty]
- POCO Type: CHANGE
- POCO Number: 2011C02037-1
- CO Description: THIS IS A TEST
- PO CO Status: REQUESTED
- Total \$ for Approval: 715.00

Buttons: General, History, Change Request

Original PO Line Information (with PLACED changes):

Line No	PO Description	PO Status	Line Amount
1	BAKER STERILCHEMGARD III BIOLOGICAL SAF	PLACED	9,549.00
2	12" DUCT WITH AIRTIGHT DAMPER ASSEMBLY	PLACED	585.00

New Lines Created from PO CO:

Line No	PO Description	PO Status	Line Amount
3	THIS IS WHERE YOU WOULD ADD NEW DESC	APPROVED	1,300.00

PO CO Line Information:

CO Line	CO Line Description	Reason Code	\$ Change (+/-) in Days	Changed Amount
2	TO CHANGE TO MATCH POINT	UNFORSEEN	-585.00	-585.00

Total: -585.00

15. Click on Approve button. PO CO Status will automatically change from REQUESTED to APPROVED.

The screenshot shows the 'Change Orders' window with the PO CO Status dropdown menu open. The menu options are:

- APPROVED
- CANCELED
- COMPLETE
- HOLD
- PLACED (highlighted)
- REJECTED
- REQUESTED

16. THEN, Change the PO CO Status to PLACED.

i) **The status of the PO CO MUST go from REQUESTED to APPROVED to PLACED to be seen on the PO.**

17. Done.