



POCOs Training Document

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Overview

The Expense Purchase Order Change Orders (POCOs) application allows you to create and manage a Purchase Order Change Order off the original Purchase Order from your downstream Vendors and Contractors.

Cost amounts are tracked in Work Breakdown according to status.


To access the Expense Purchase Order Change Orders application, please open the Apps repository. Under the Cost Management suite of applications click on Expenses.

This will launch the Expenses Applications which will include:

- Contracts
- Change Requests
- Change Orders
- Pay Requests
- Purchase Orders
- **Purchase Order Change Orders**
- Invoices



Create a Purchase Order Change Order (POCO)

1. To create a new Purchase, select the **Purchase Orders Change Orders** tab, then click the **New** button to open a new Purchase Order Change Order
2. Notice a new form on the right side of the screen
3. Populate the Purchase Order Change Order Details such as Purchase Order, Date, Description, Requisitioned By, Charge Code, Vendor Name and Banner ID
4. The Vendor section will populate with the Vendor information based on the selected Purchase Order in the Details Section
 - a. Note: This information is read-only
5. To add Purchase Order Change Order line items, navigate to the Items grid
 - a. To add multiple line items, determine how many lines you will need and click Insert
 - b. Select the applicable cost codes and fill out the remaining details regarding this record.
6. To view the Purchase Order Change Order Items in further detail, click the more details  icon next to the POCO Item number
 - a. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments
 - b. Use the Previous and Next action buttons to sort through the Items if needed.
7. Click Done once details have been added.



0001

Items (by Cost Type) Save To Calculate...
Tax Save To Calculate...
Total Save To Calculate...

DETAILS

Purchase Order

Field is required.
Number
0001

Date

Description

Category

Requisitioned By

Date Requisitioned

Authorized By

Save / Close

SECTIONS

- DETAILS
- VENDOR
- SHIPPING
- INVOICING
- DATES & WORKFLOW
- ITEMS
- SIGNATURES
- COMMENTS
- REFERENCES

ITEMS

Status: Projected

Entry Type: Line Price

Tax Type: Separate Line Item

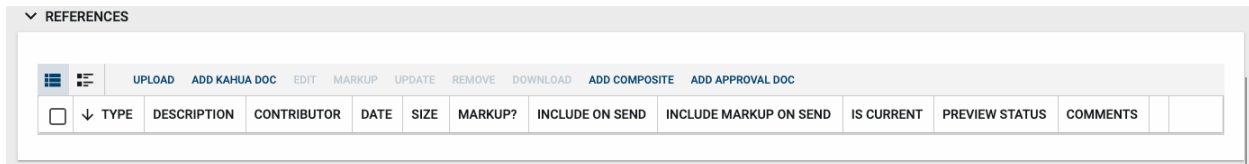
Activity Code

Insert 1 Item(s)

No.	Activity Code	Cost Item Type	Descr.	Qty	UOM	Unit Price	Tax Rate	Is Manual	Taxable	Status	Total
01				1		\$ 0.00		<input type="checkbox"/> Manual	<input checked="" type="checkbox"/> Taxable	Projected	\$0.00



8. Documents can be attached to the record under the References section. The user can either:

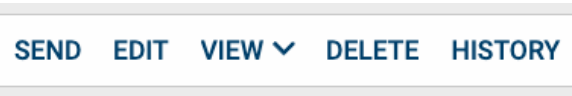


- a. Upload a document saved on their computer
 - b. Add Kahua Doc to reference a document that is stored within Kahua’s File Manager application
 - c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
9. Once all details have been filled out, click Save/Close

Purchase Order Change Order Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **View** – This action button displays the Portable View (document view)
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked



Send


- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box



Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon**  to generate a printable PDF version of the document

History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button



Approve a Purchase Order Change Order (POCO)

1. As Purchase Orders Change Orders will be used as a form of Data Entry there are no Workflows Configured for the application
2. All POCOs will have to be Set to Approved Manually
 - a. Please set the status manually by using the 'Set To' button at the bottom of the record
 - b. The option to manually Set To Projected, Pending, Approved, or Approved & Lock
3. The selection will determine where the values are on the Work Breakdown

