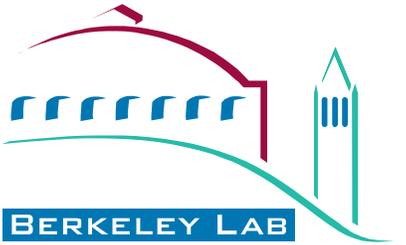
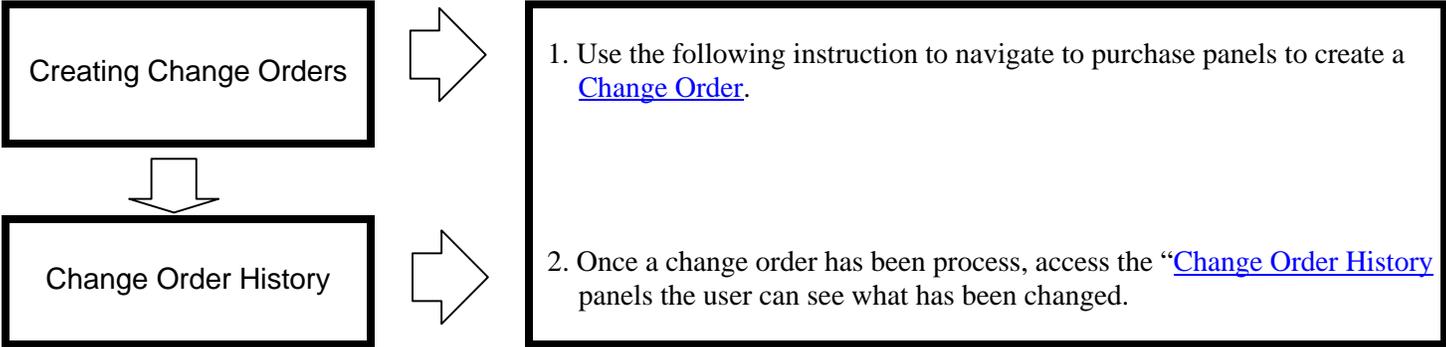


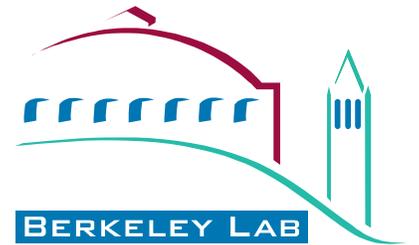
How do I Create a Change Order from a Converted Purchase Order?



When a it becomes necessary to create a Change Order to a Purchase Order converted from Oracle.



How do I Create a Change Order from a Converted Purchase Order?



Step 1: Converted PO Change Orders Quantity Changes

Within our database we will have 2 different types of purchase orders.

- Converted Purchase Orders from Oracle
- New Purchase Orders created from Online Requisitions.

This document will cover Change Orders to Converted Purchase Orders. You will have to follow the steps exactly to create the Change Order.

1

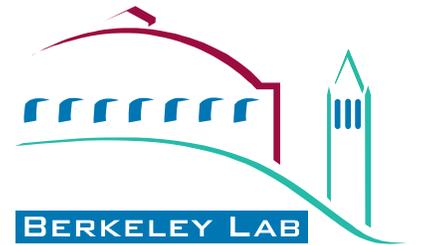
To change a Converted Purchase Order online, you'll use the same panels you use when you update a Purchase Order, except that you will be creating a Change Order, and for this reason, you will be clicking a few different buttons to tell the system to create a change order as well as some unique keystrokes to enable the system to recognize the changes.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Purchase Orders
- ⇒ Use
- ⇒ Purchase Order
- ⇒ Lines

The Update/Display Purchase Order dialog box displays.

Unit	PO	PO Date	Status	ShortName	Vendor	Name
------	----	---------	--------	-----------	--------	------

How do I Create a Change Order from a Converted Purchase Order?



The business unit of LBNL will default.

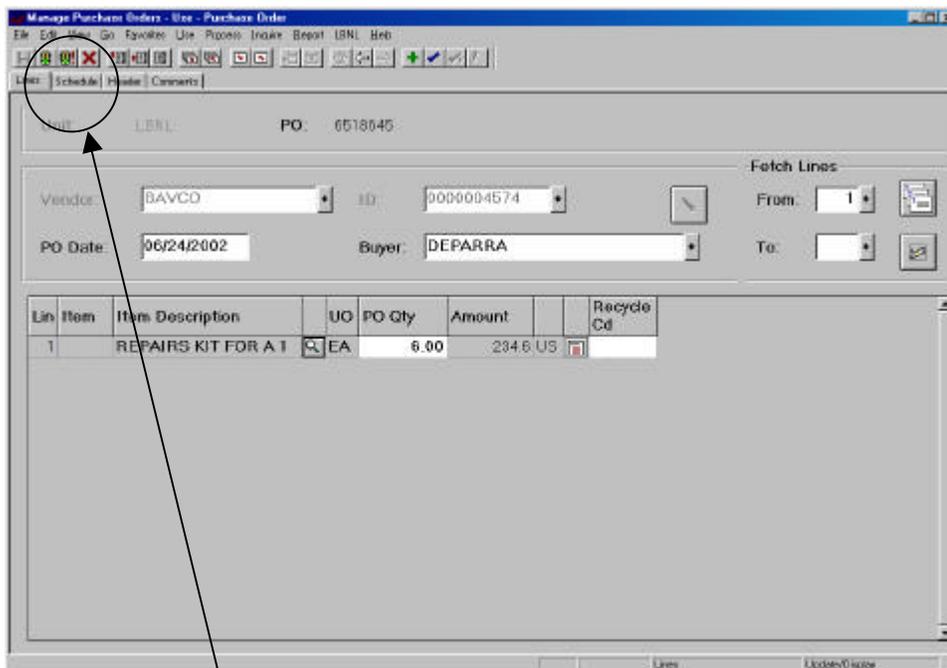
Enter the Purchase Order number of the dispatched Converted Purchase that requires the change.

Click **OK**.

2

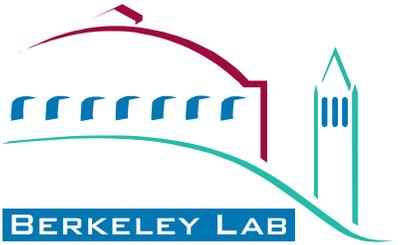
The *Update/Display Purchase Order Lines* panel will display.

When the panel opens, click the Fetch  button. The Line Details will populate the panel.

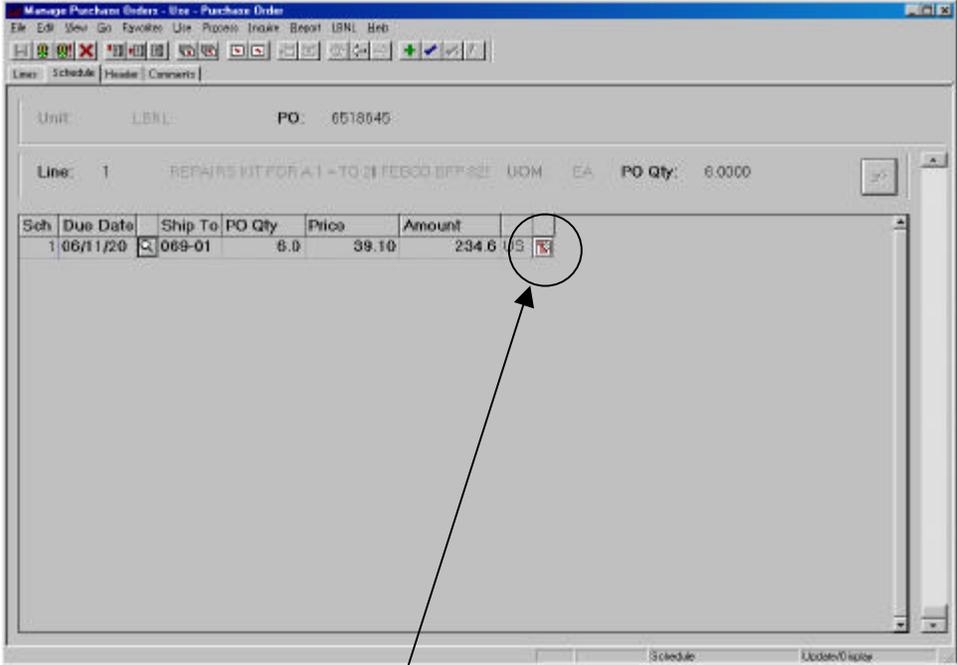


Select the "Schedule Tab", and click on the "Fetch  Button"

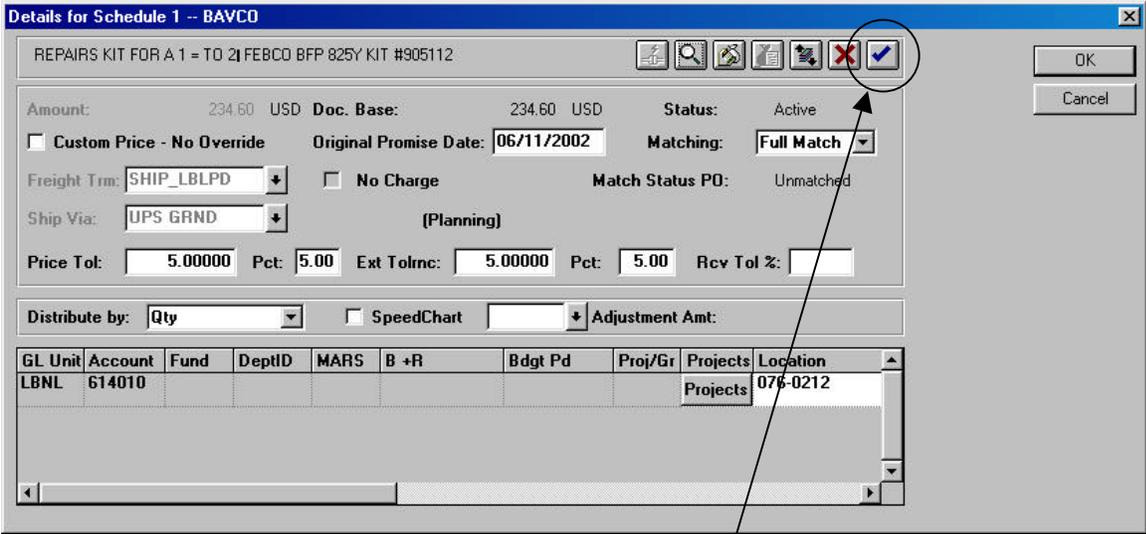
How do I Create a Change Order from a Converted Purchase Order?



3

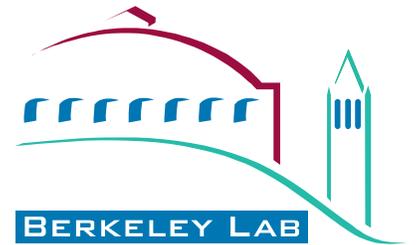


Click on the "Schedule Details" button.

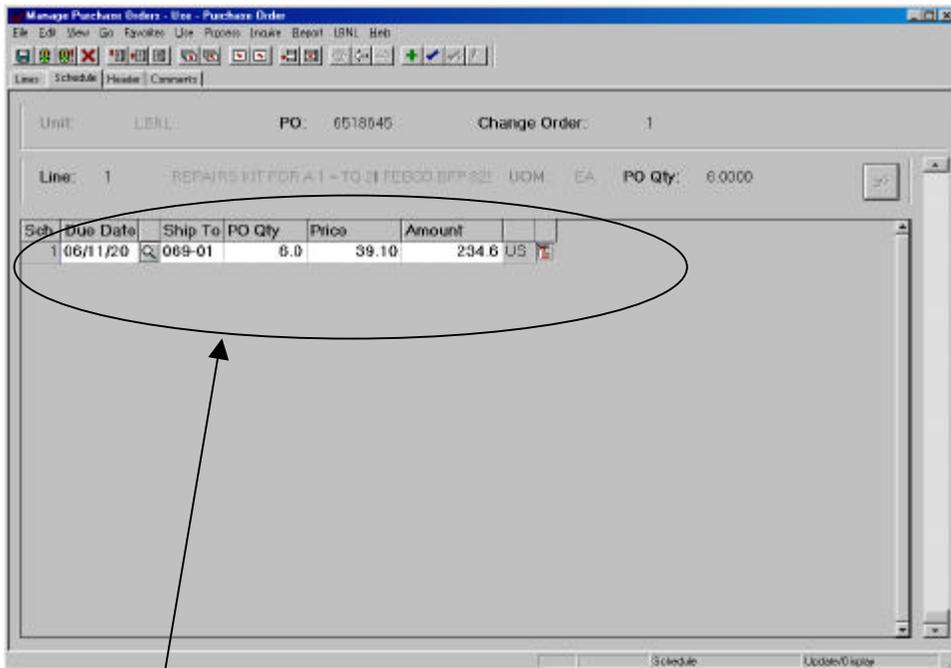


Click on the "Blue Check" change order button.

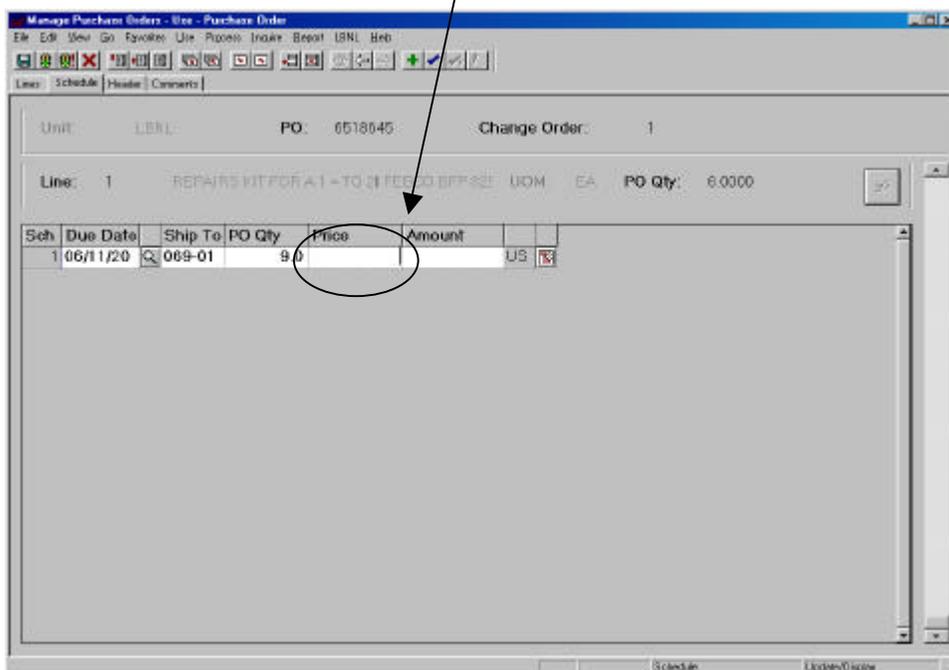
How do I Create a Change Order from a Converted Purchase Order?



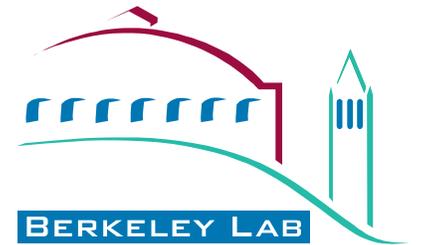
4



As you can see, the line has been un-grayed and will be open for editing. When creating a change to the quantity, **COPY** the current unit price. When changing the quantity the unit price will disappear from the panel. Update the quantity, the system will not recognize the first attempt and will require a second. Once the second change is accepted by the system the price will be gone.

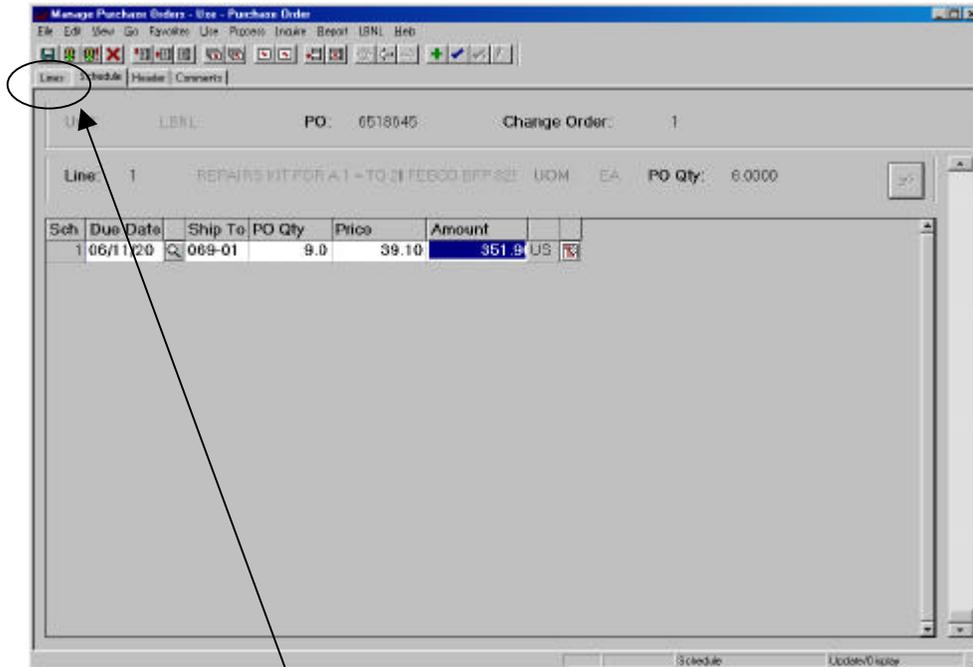


How do I Create a Change Order from a Converted Purchase Order?



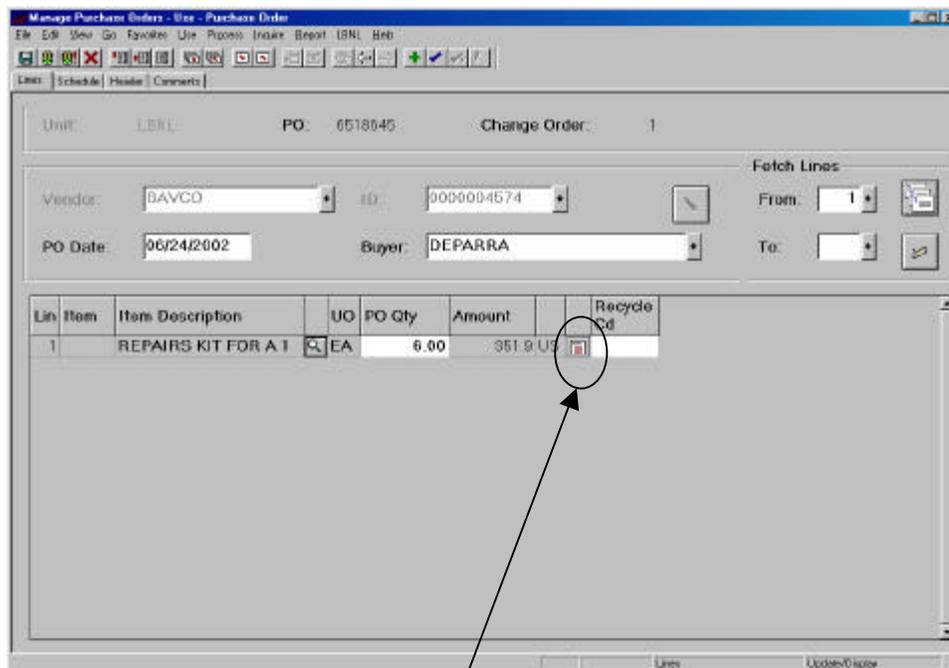
Enter in the price field the current price you copied.

5



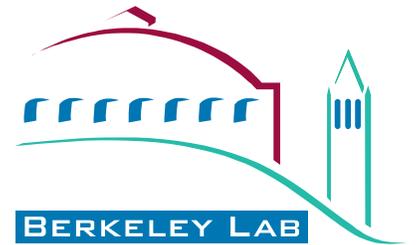
Click on the Lines tab.

6



Click on the "Line Details" button.

How do I Create a Change Order from a Converted Purchase Order?



The Line Details panel will open up and you can click on the “Create Line Change” button.

7

The "Line Details -- BAVCO" dialog box is shown. It contains the following fields and controls:

- Title: REPAIRS KIT FOR A 1 = TO 21 FEBCO BFP 825Y KIT #905112
- Amount: 351.90 USD Document Base: 351.90 USD
- Category: STORE (dropdown) Stores Status: Active
- Contract: LBNL (dropdown)
- RFQ ID: (empty field)
- Vendor Item ID: (empty field)
- Vndr Catlg: (empty field)
- Mfg ID: (empty field)
- Price Qty: Schedule (dropdown) Price Date: PO (dropdown)
- Withholding (dropdown)
- Receiving Required
- Inspect (dropdown)
- Buttons: OK, Cancel
- Toolbar: Search, Print, Checkmark, X

You will open the Purchase Order Line for editing.

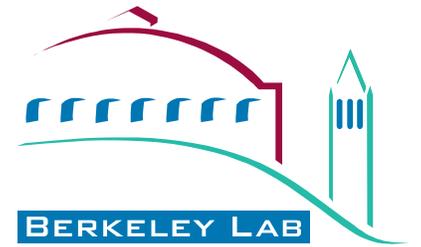
8

The "Manage Purchase Orders - Use - Purchase Order" window is shown. It contains the following fields and controls:

- Unit: LBNL PO: 0518045 Change Order: 1
- Vendor: BAVCO ID: 0000004574
- PO Date: 06/24/2002 Buyer: DEPARRA
- Fetch Lines: From: 1 To: (empty)
- Table:

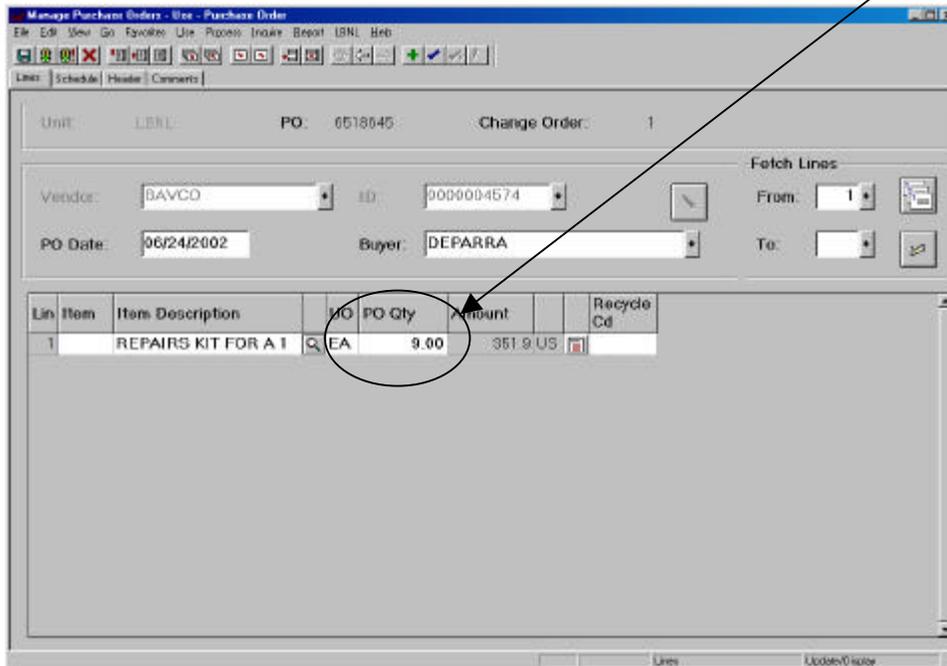
Lin Item	Items Description	UO	PO Qty	Amount	Recycle Cd
1	REPAIRS KIT FOR A 1	EA	6.00	351.9 US	

How do I Create a Change Order from a Converted Purchase Order?



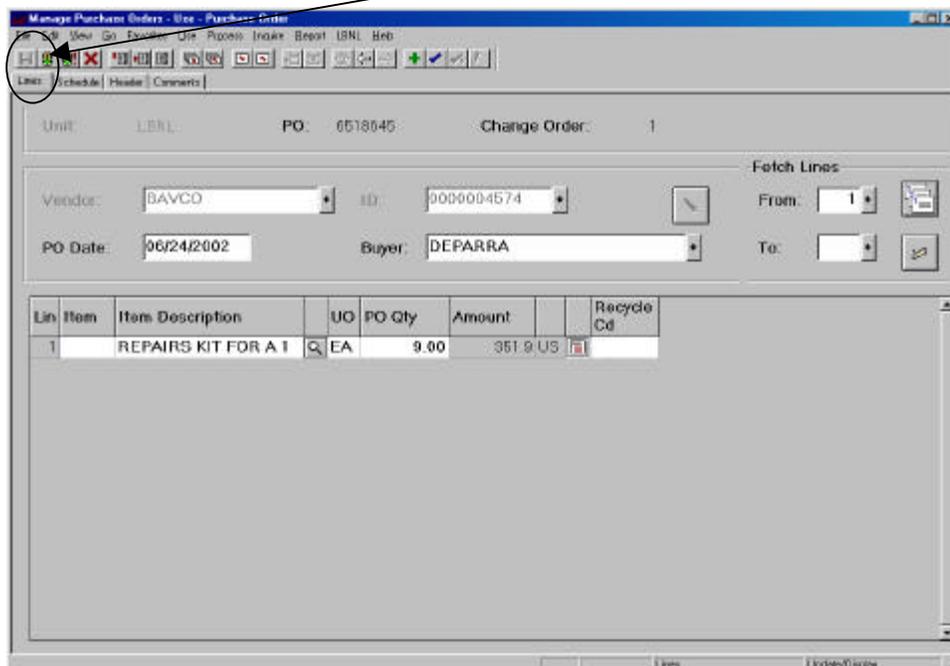
Change the quantity on the line to the quantity from the “Schedule Details” panel.

9

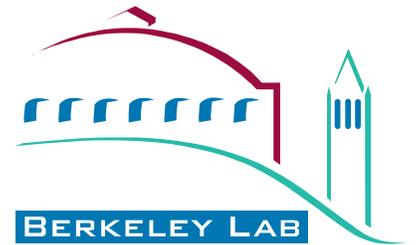


After you've changed the quantity, Click the Save  button.

10



How do I Create a Change Order from a Converted Purchase Order?



Step 2: Change Order History

You can access and review a history of the change orders for specific Purchase Orders. For each change order, you can review individual header, line, and schedule changes made to a purchase order since its initial dispatch. On each of these panels, you can scroll backwards from the most current version of the header, line, or schedule to the information originally dispatched.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Purchase Orders
- ⇒ Inquire
- ⇒ Change History

The Update/Display Change Order History dialog box displays.

The screenshot shows a software dialog box titled "Update/Display -- Change History". It contains several input fields: "Business Unit" (set to "LBNL"), "Purchase Order" (empty), "Purchase Order Date" (dropdown), "Purchase Order Reference" (text), "Short Vendor Name" (dropdown), "Vendor ID" (dropdown), "Name 1" (text), and "Buyer Name" (dropdown). On the right side, there are buttons for "OK", "Cancel", "Search", "Detail", "Use Query", and "New Query". Below the input fields is a table with columns: "Unit", "PO", "PO Date", "PO Ref", "ShortName", "Vendor", and "Name". The table is currently empty.

The business unit of LBNL will default, click on the Search button and select the specific purchase order you want to view the change order history.

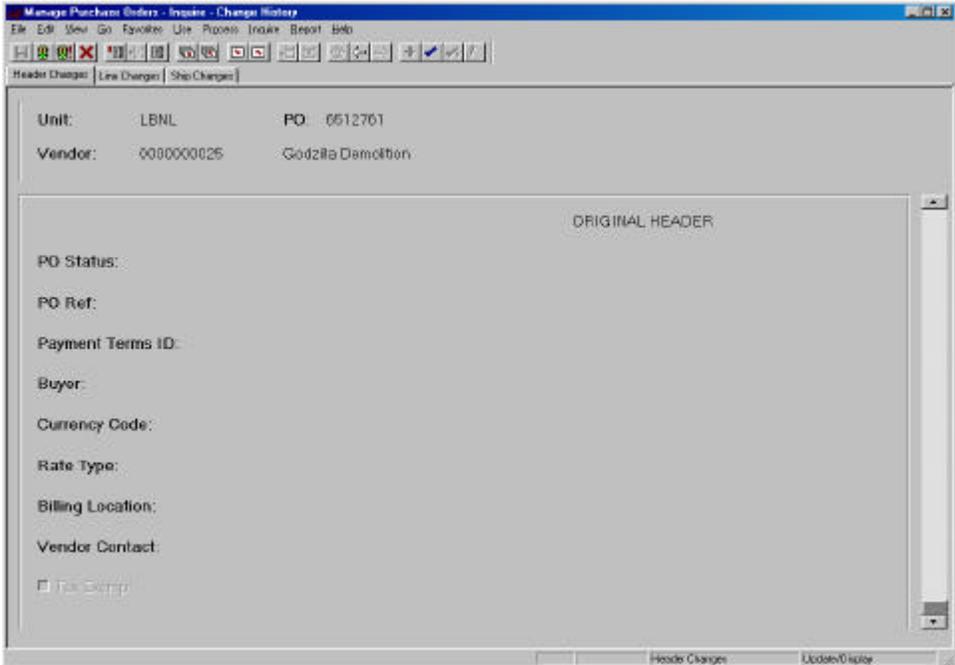
Click **OK**.



How do I Create a Change Order from a Converted Purchase Order?

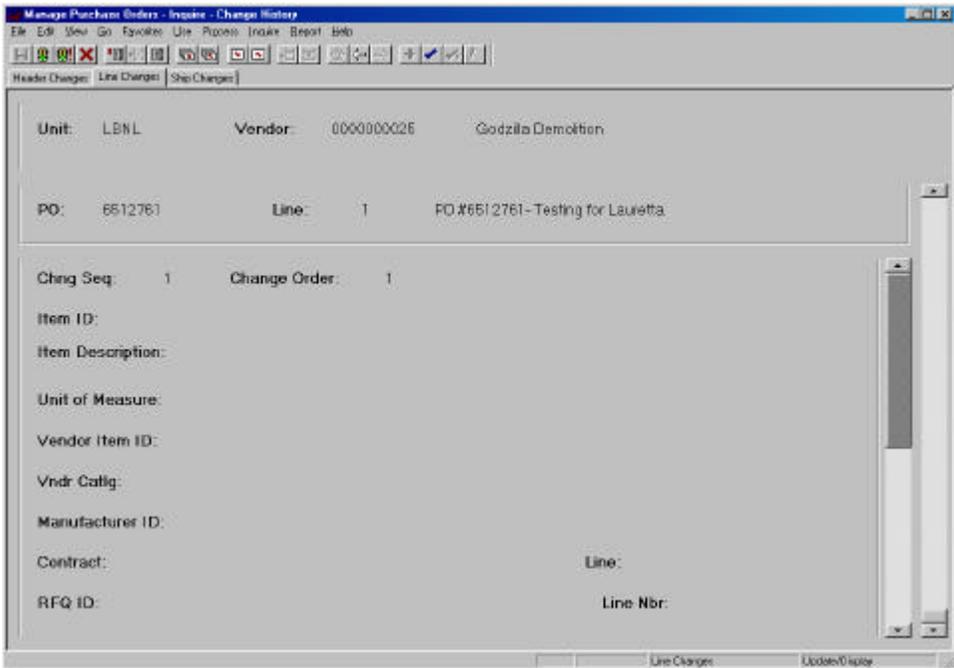
Header Changes

From this panel you will be able to view the various changes within the header panel.

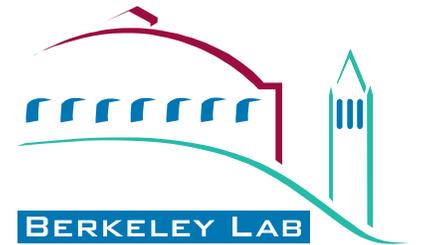


Line Changes

On this panel you will begin to see changes that were made to the purchase order. Using the scroll bar you can access what changes were made.



How do I Create a Change Order from a Converted Purchase Order?



Ship Changes

On this panel you will see from the example that the Unit Price was changed creating the Change Order.

Unit: LBNL Vendor: 0000000025 Godzilla Demolition

Current Item Details

PO: 6512761 Line: 1 Sched Num: 1

Item ID: Item: PO #6512761-Testing for Lauretta

Due Date: 05/18/2002 Original Schedule

PO Qty: 1.0000

Price: 2,611.56200 Amount: 2,611.55

Ship To: 069-0150 RECEIVING/SHIPPING

Freight Trm: DEST_VENFD DESTINATION VENDOR PAYS FRT

Ship Via: FEDEX FEDEX

Original Unit Price

Unit: LBNL Vendor: 0000000025 Godzilla Demolition

Current Item Details

PO: 6512761 Line: 1 Sched Num: 1

Item ID: Item: PO #6512761-Testing for Lauretta

Chng Seq: 1 Change Order: 1

Due Date:

PO Qty:

Price: 2,620.00000 Amount: 2,620.00

Ship To:

Freight Trm:

Ship Via:

The new Unit Price. This change created the "Change Order".