

Oracle / PeopleSoft Decommitment for the Requester

CREATED ON 08/26/14

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Decommitment Process

Background:

As of July 15, 2014, the decommitment process will be initiated by the requester making a change to the original Purchase Requisition (PR) price that is associated to the Purchase Order Line. The requester will also attach to the revised PR the required support documentation described herein under the headings “Professional Service Agreements” and “Construction”. After the revised PR is submitted for approval the requester will insert the Contract Administrator into the approval workflow as the final approver. All approvers will take the approval action except for the Contract Administrator who will use the Approval page to review the attached support documentation. The Contract Administrator will then leave the approval page and manually update the associated Purchase Order Line and run the close process when applicable. After all changes are completed by the Contract Administrator, the Contract Administrator will return to the Requisition Approval page and approve the revised PR.

Professional Service Agreements

Three scenarios have been identified for Decommitment for all Professional Services

1. **Completed Work - Decommitment with a final invoice** -The work associated with this work plan / work scope is completed and BART has paid the final invoice. The line(s) on the Purchase Order (PO) will be adjusted in accordance with the instructions on the Decommitment Form and the PO will be closed by the Contract Administrator. The remaining amount from the PO would be decommitted by the Agreement Financial Analyst.

Back up documentation – 1) Cover page of the Final Invoice certified and signed by the Consultant, and 2) evidence of payment by the District.

2. **Completed Work - Decommitment without a final invoice** - The work associated with this work plan is completed. BART does not have a final invoice. The line(s) on the PO for this item of work will be adjusted in accordance with the instructions on the Decommitment Form and closed by the Contract Administrator. It is the responsibility of the Agreement Financial Analyst to coordinate with the vendor to request verification that all invoices have been paid and no further invoices/billings will be submitted. After the verification is received, any remaining amount from the work plan’s PO would be decommitted.

Back up documentation – 1) Decommitment Form, 2) Signed Certification by the Consultant/Vendor that all costs have been paid and no further invoices/billings will be submitted.

3. **Change of Scope - Partial Decommitment** - The work associated with this work plan has not been completed. The project would like to decommit a portion of the PO value due to scope change. The line(s) on the PO will be adjusted in accordance with the instructions on the Decommitment Form. It is the responsibility of the Project Manager to negotiate with the Consultant/Vendor any reduction in the scope and associated costs. At the completion of the Project Managers negotiation, the Project Manager provides the Agreement Financial Analyst with the documentation of the negotiations. This documentation would include an agreement between the Project Manager, Vendor and Agreement Manager regarding the change in scope and cost that should be de-committed

and the amount remaining in the work plan. The Agreement Financial Analyst will then process the decommitment.

Back up documentation – 1) Decommitment Form, 2) Agreement signed by the Consultant, Project Manager, and the Agreement Manager stating the change in scope, the associated amount to be de-committed and the amount remaining in the work plan .

Public Works Construction:

The decommitment process will be used in situations when the value of the close out change order for public works is negative, i.e. credit to the District. In order to be consistent with the provisions of public works Contract Documents and the RE Manual, the close out change order is to be issued shortly after the Final Inspection and quantity verification reconciliation but before Acceptance of the Work by the District and the recordation of such Acceptance with the County. Then after the Approved Final Invoice has been paid, and in the case of negative close out change order only, the Resident Engineer will follow the instructions in this manual.

Back up documentation: 1)Decommitment form, 2)the conformed negative change order and 3) a copy of the paid Final Invoice.

Complete the Decommitment Form

The decommitment form can be found on WebBart > Training and Development > I.T. Materials > Procurement > Decommitment Form.

Change Order to the Purchase Requisition

The original Requester will need to edit the original purchase requisition.

Note: Contact IT (Sarah Castro x4940) if the Requester is no longer at BART, cannot be reached, or has different access due to changing positions.

Change Price

Navigation: Main Menu > eProcurement > Manage Requisitions

Manage Requisitions

Search Requisitions
To locate requisitions, edit the criteria below and click the Search button.

Business Unit:	<input type="text" value="BARTD"/>	Requisition Name:	<input type="text"/>
Requisition ID:	<input type="text" value="0000002310"/>	Request Status:	<input type="text" value="All but Complete"/>
Date From:	<input type="text"/>	Date To:	<input type="text" value="08/26/2014"/>
Requester:	<input type="text" value="060873"/>	Entered By:	<input type="text"/>

PO ID:

Requisitions
To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000002310	6M8046 KKCS B.03-01	BARTD	10/27/2011	PO(s) Dispatched	Valid	102,880.00 USD	<Select Action> <input type="button" value="Go"/>

Select Action

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Manage Requisitions

Search Requisitions
To locate requisitions, edit the criteria below and click the Search button.

Business Unit:	<input type="text" value="BARTD"/>	Requisition Name:	<input type="text"/>
Requisition ID:	<input type="text" value="0000002310"/>	Request Status:	<input type="text" value="All but Complete"/>
Date From:	<input type="text"/>	Date To:	<input type="text" value="08/26/2014"/>
Requester:	<input type="text" value="060873"/>	Entered By:	<input type="text"/>

PO ID:

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To view the lifespan and line items for a requisition, click the Expand triangle icon:
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Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000002310	6M8046 KKCS B.03-01	BARTD	10/27/2011	PO(s) Dispatched	Valid	102,880.00 USD	Edit Requisition <input type="button" value="Go"/>

Click Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: BARTD Requisition Name: Request Status: All but Complete Budget Status:

Requisition ID: 0000002310 Date From: Date To: 08/26/2014 Requester: 060873 Entered By: PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000002310	6M8046 KKCS B.03-01	BARTD	10/27/2011	PO(s) Dispatched	Valid	102,880.00 USD	Edit Requisition Go

Create New Requisition Review Change Request Review Change Tracking

Message

This requisition is approved. Editing this requisition may restart the approval process. (18036,6249)

Click OK to continue, or click Cancel to go back.

OK Cancel

Click OK

Manage Requisitions

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: BARTD SF BART District Requester: 060873 Tan, Vicki *Currency: USD Requisition Name: 6M8046 KKCS B.03-01 Track Batch: 8 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	6M8046 KKCS B.03-01: ISRC Cont	KAL KRISHNAN CONSULTING SERVICES, INC	1.0000	Each	102,880.00000	102,880.00

Amount: 102,880.00 USD Balance: 0.000

Add to Template(s) Modify Line / Shipping / Accounting Delete

Save & submit Save & preview approvals Cancel Changes Find more items Add Request Document Current Change Reason

Note: Another way to change the price is to click on the description link, edit the price field, and click ok to return.

Change Price

Edit Requisition

[1. Define Requisition](#) [2. Add Items and Services](#) [3. Review and Submit](#)

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SF BART District
Requester: Tan,Vicki ***Currency:**
Requisition Name: **Track Batch:** 8 **Priority:**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	6M8046 KKCS B.03-01: ISRC Cont	KAL KRISHNAN CONSULTING SERVICES, INC	1.0000	Each	102483.65	102,880.00
Total Amount:						102,880.00 USD
Pre-Encumbrance Balance:						0.000

[Select All / Deselect All](#) [Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)



Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification [More Comments](#)

[Check Budget](#) [Save & submit](#) [Save & preview approvals](#) [Cancel Changes](#) [Find more items](#) [Add Request Document](#)
[Current Change Reason](#)

Favorites | Main Menu > eProcurement > Manage Requisitions

Line Comments

Business Unit: BARTD Requisition Date: 10/27/2011
Requisition ID: 000002310 Status: Approved Line: 1

Comments Find First 1 of 1 Last

[Use Standard Comments](#) Entered On: 08/06/2014 10:08:49AM

1 << **User Comments: DECOMMITMENT
This trend is for William Romesburg of CIT COM to provide contract development for project 79HP.
Service Period: September - December 2011.

Send to Vendor Show at Receipt Show at Voucher

Click Add Attachments

Favorites | Main Menu > eProcurement > Manage Requisitions

Line Comments

Business Unit: BARTD Requisition Date: 10/27/2011
Requisition ID: 000002310 Status: Approved Line: 1

Comments Find First 1 of 1 Last

[Use Standard Comments](#) Entered On: 08/06/2014 10:08:49AM

1 << **User Comments: DECOMMITMENT
This trend is for William Romesburg of CIT COM to provide contract development for project 79HP.
Service Period: September - December 2011.

Send to Vendor Show at Receipt Show at Voucher

File Attachment ? Help

No file selected.

Browse to Attach File

Change Reason

Enter a reason code and comment for making changes that are being tracked.

Reason Code: 

Comment:  



Add Support Documentation

Confirmation

Requested For:	Romero,Grace	Number of Lines:	1
Requisition Name:	PGHW 6M8036 B.04-055 15EJ100	Total Amount:	28,432.71 USD
Requisition ID:	0000003265	Pre-Encumbrance Balance:	0.000
Business Unit:	BARTD	Justification:	PGH Wong 6M8036 B.04-055 Traction Power Scheduling Analysis 15EJ100 for 3 months
Status:	Pending		
Priority:	Medium		
Budget Status:	Not Checked		

Capital

Line 1: Pending View/Hide Comments Start New Path

PGH Wong 6M8036 B.04-055 Traction Power Scheduling Analysis 15EJ100 for 3 months

Capital

Pending Seng Saelee
BART Project Financial Analyst

Not Routed Lori Lovett
Project Managers

Not Routed Lee Janice Y
Grants Compliance Analysts

Comment History

Change Request/Line Approval Summary Personalize View All 1 of 1

Line	Item Description	Change Request	Line Re-Approval
1	PGH Wong 6M8036 B.04-055 Trac		Routed for Approval

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#)

[View printable version](#)

[Manage Requisitions](#)

[Create New Requisition](#)

[Approval History](#)

Click Edit Requisition to Attach Support Documentation

Edit Requisition

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SF BART District
Requester: Romero, Grace *Currency:
Requisition Name: Track Batch: 1 Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	PGH Wong 6M8036 B.04-055 Trac	PGH WONG ENGINEERING INC	1.0000	Each	28,432.71000	28,432.71
Total Amount:						28,432.71 USD
Pre-Encumbrance Balance:						0.000

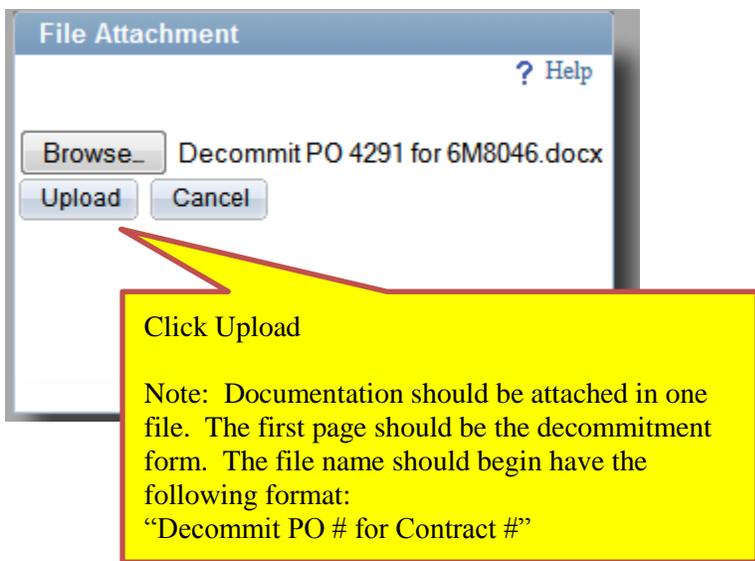
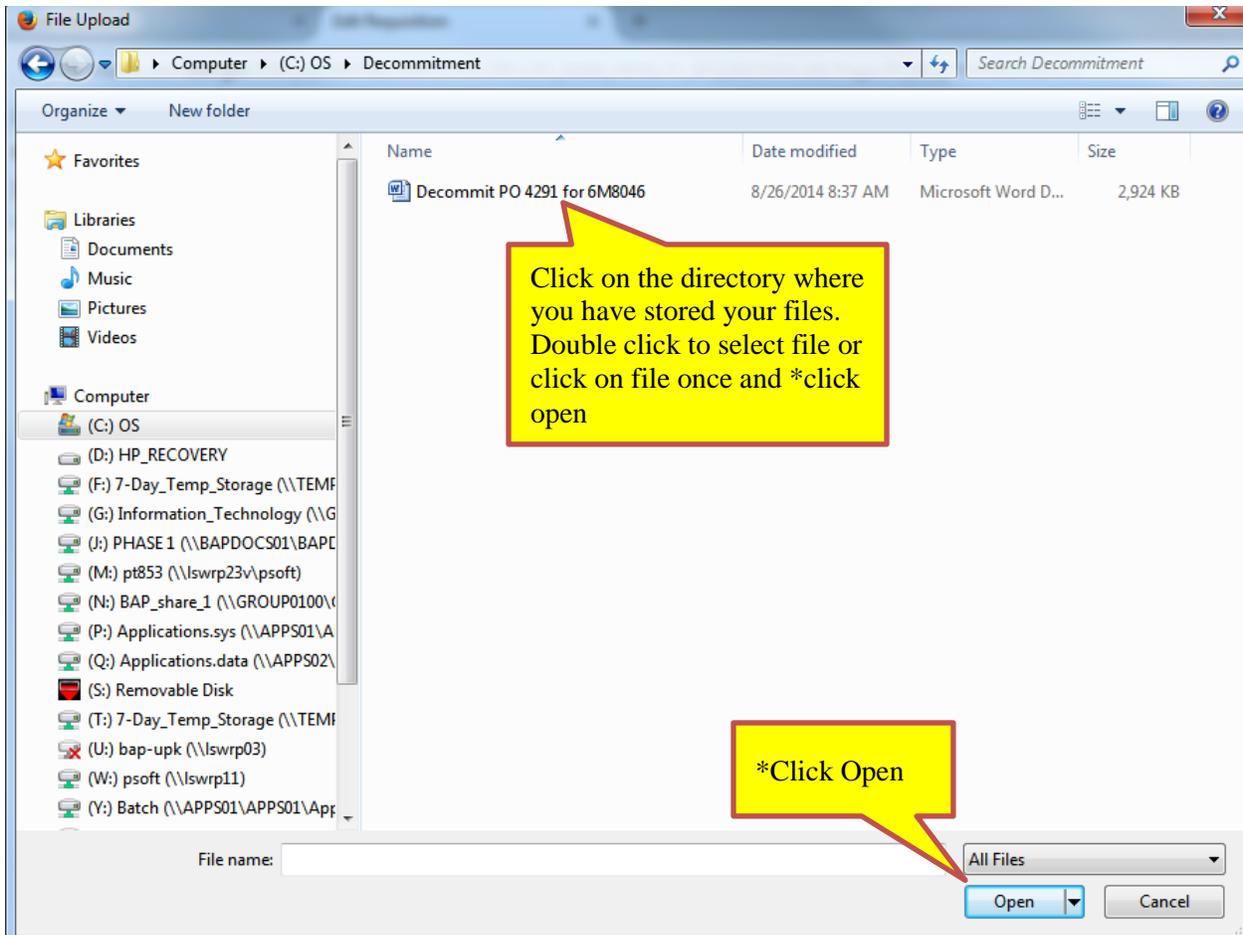
Comments

PGH Wong 6M8036 B.04-055 Traction Power Scheduling Analysis 15EJ100 for 3 months

Send to Vendor
 Show at Receipt
 Shown at Voucher
 Approval Justification
 [More Comments](#)

[Find more items](#)

[Current Change Reason](#)



Line Comments

Business Unit: BARTD Requisition Date: 10/27/2011
 Requisition ID: 000002310 Status: Approved Line: 1

Comments Find First 1 of 1 Last

[Use Standard Comments](#) Entered On: 08/06/2014 10:08:49AM

1 << **User Comments: DECOMMITMENT
 This trend is for William Romesburg of CIT COM to provide contract development for project 79HP.
 Service Period: September to December 2011.

Send to Vendor Show at Receipt Show at Voucher

[Add Attachments](#)

Attachments

Attached File	View	Send to Vendor
1 Decommit_PO_4291_for_6M8046.docx	View	<input type="checkbox"/>

Note: Comments must be entered in order to attach documents.

[OK](#) [Cancel](#)

Click OK.

Note: File names can only be 60 characters

Edit Requisition

- [1. Define Requisition](#)
- [2. Add Items and Services](#)
- [3. Review and Submit](#)

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SF BART District
 Requester: Tan, Vicki *Currency:
 Requisition Name: Track Batch: Priority:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	6M8046 KKCS B.03-01: ISRC Cont	KAL KRISHNAN CONSULTING SERVICES, INC	1.0000	Each	102,483.65000	102,483.65
Total Amount:						102,483.65 USD
Pre-Encumbrance Balance:						0.000

[Select All / Deselect All](#)

[Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification [More Comments](#)

[Check Budget](#)

[Save & submit](#) [Save & preview approvals](#) [Cancel Changes](#) [Find more items](#) [Add Request Document](#)

[Current Change Reason](#)

Click Save and Preview

Change Reason

Enter a reason code and comment for making changes that are being tracked.

Reason Code:

Comment:

Change comment to Decommitment or other applicable comments

OK

Click OK

Insert Approver

Confirmation

Requested For:	Tan, Vicki	Number of Lines:	1
Requisition Name:	6M8046 KKCS B.03-01	Total Amount:	102,483.65 USD
Requisition ID:	0000002310	Pre-Encumbrance Balance:	0.000
Business Unit:	BARTD		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		

Capital

Line 1: Initiated + Start New Path
6M8046 KKCS B.03-01: ISRC Contract Development (79HP)

Capital

Not Routed +
Velasquez, Maria
BART Project Financial Analyst

Not Routed +
Drew Linde
Project Managers

Not Routed +
Christopher Igo
Grants Compliance Analysts

Change Request/Line Approval Summary Personalize | View All

Line	Item Description	Change Request	Line Re-Approval
1	6M8046 KKCS B.03-01: ISRC Cont	Created	

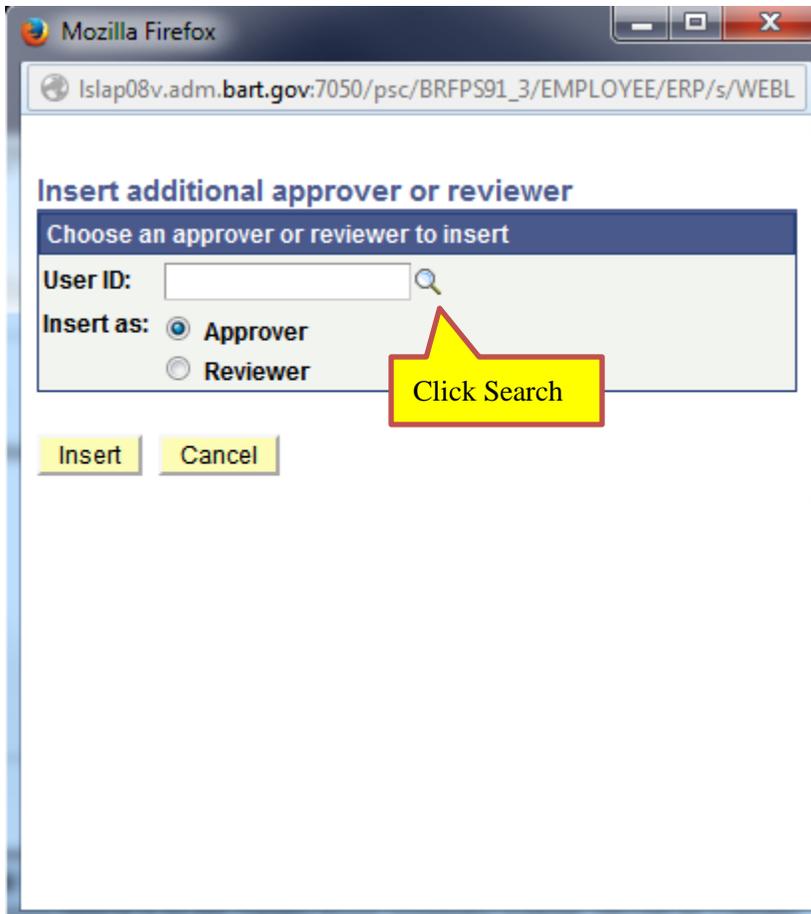
[View printable version](#)

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[Approval History](#)

Click on the plus icon to insert the Contract Administrator



Mozilla Firefox

Islap08v.adm.bart.gov:7050/psc/BRFPS91_1/EMPLOYEE/ERP/s/WEBL

Approver/Reviewer Search

Name: begins with

User ID: begins with

Click Search

Enter the Last Name of the Contract Administrator that is associated with the PO related to the Requisition

User ID	Name
000005	Steph
000500	TCD
000501	M&E TESTCARD1
000502	M&E TESTCARD2
000503	M&E TESTCARD3
000504	M&E TESTCARD4
000505	TCD TESTCARD2
000506	M&E TESTCARD5
000507	M&E TESTCARD6
000508	M&E TESTCARD7
000509	M&E TESTCARD8
000510	TCD TESTCARD3
000511	M&E TESTCARD9

Mozilla Firefox

Islap08v.adm.bart.gov:7050/psc/BRFPS91_1/EMPLOYEE/ERP/s/WEBL

Approver/Reviewer Search

Name: begins with

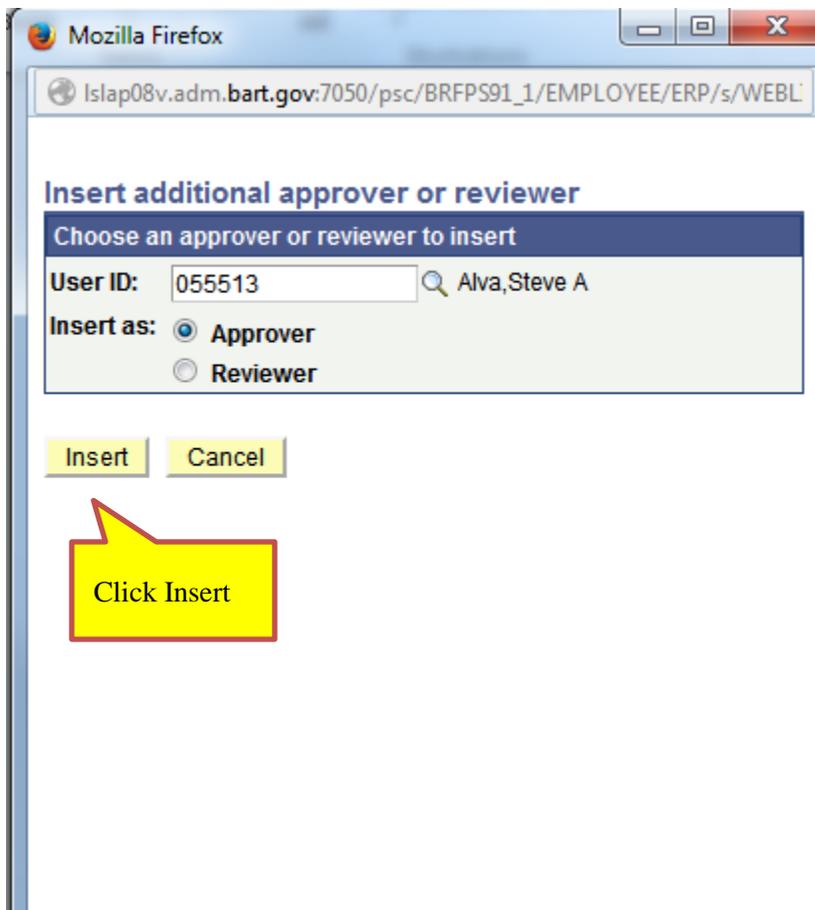
User ID: begins with

Search Results

1 - 1 of 1

User ID	Name
055513	Alva, Steve A

Select the Approver



Confirmation

Requested For:	Tan,Vicki	Number of Lines:	1
Requisition Name:	6M8046 KKCS B.03-01	Total Amount:	102,483.65 USD
Requisition ID:	0000002310	Pre-Encumbrance Balance:	0.000
Business Unit:	BARTD		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		

Capital

Line 1: Initiated + Start New Path

6M8046 KKCS B.03-01: ISRC Contract Development (79HP)

Capital

```

    graph LR
      A[Not Routed  
Velasquez, Maria  
BART Project Financial Analyst] --> B[Not Routed  
Drew Linde  
Project Managers]
      B --> C[Not Routed  
Christopher Igo  
Grants Compliance Analysts]
      C --> D[Not Routed  
Alva, Steve A  
Inserted Approver]
  
```

Change Request/Line Approval Summary Personalize | View All | 1 of 1

Line	Item Description	Change Request	Line Re-Approval
1	6M8046 KKCS B.03-01: ISRC Cont	Created	

-

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[Manage Requisitions](#)
[Create New Requisition](#)
[Approval History](#)



Change Reason

Enter a reason code and comment for making changes that are being tracked.

Reason Code: 

Comment:  

Click OK

Confirmation

Requested For:	Tan,Vicki	Number of Lines:	1
Requisition Name:	6M8046 KKCS B.03-01	Total Amount:	102,483.65 USD
Requisition ID:	0000002310	Pre-Encumbrance Balance:	0.000
Business Unit:	BARTD		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		

Capital

Line 1: Initiated [Start New Path](#)

6M8046 KKCS B.03-01: ISRC Contract Development (79HP)

Capital

```

    graph LR
      A[Velasquez Maria  
BART Project Financial Analyst] --> B[Drew Linde  
Project Managers]
      B --> C[Christopher Igo  
Grants Compliance Analysts]
      C --> D[Alva Steve A  
Inserted Approver]
  
```

Line	Item Description	Change Request	Line Re-Approval
1	6M8046 KKCS B.03-01: ISRC Cont	Created	

[View Requisition](#)
[Manage Requisitions](#)
[Create New Requisition](#)

Click
Submit

Change Reason

Enter a reason code and comment for making changes that are being tracked.

Reason Code: 

Comment:  

Click OK

Confirmation

Requested For:	Tan, Vicki	Number of Lines:	1
Requisition Name:	6M8046 KKCS B.03-01	Total Amount:	102,483.65 USD
Requisition ID:	0000002310	Pre-Encumbrance Balance:	0.000
Business Unit:	BARTD		
Status:	Pending		
Priority:	Medium		
Budget Status:	Not Checked		

The changed Requisition is now pending Approval

Capital

Line 1: Pending [View/Hide Comments](#)
[Start New Path](#)

6M8046 KKCS B.03-01: ISRC Contract Development (79HP)

Capital

Comment History

Change Request/Line Approval Summary [Personalize](#) | [View All](#) | 1 of 1

Line	Item Description	Change Request	Line Re-Approval
1	6M8046 KKCS B.03-01: ISRC Cont	Created	Routed for Approval

-

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[Create New Requisition](#)
[Approval History](#)