FACILITIES MANAGEMENT
230 Approvals

U233: Requisition Approval
EXAMPLES NEEDED FOR TRAINING

1. Each student should have completed (4) PREQs in the previous training session that will roll up to their supervisor.

2. Student Approval Limits should be $500. A student’s Supervisor is their Student ID plus one; Student04 is supervised by Student05 and so on – DO NOT USE STUDENT01 FOR THIS TRAINING.

3. Make sure ALL purchase requisitions that were pending approval for all the Student IDs have been approved.

Slide 6: Review the Purchase Requisition Approval form.

Slide 12: Review how to audit rejection comments from the Purchase Requisition form, using PRQ144229 as an example.

Slide 14: Allow the students approve all their pending Purchase Requisition approvals.
U233 REQUISITION APPROVAL

SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

When does a purchase requisition need to be approved?

• Before a purchase requisition can be converted to a purchase order by the Purchasing Department, it must first be approved.

• Purchase requisitions for services and direct, non-COMPASS parts will always go through the approval process.

• COMPASS part purchase requisitions are automatically approved no matter what the dollar limit.
The purchase requisition approval process entails:

- The system checking to see if the purchase exceeds the requestor’s purchasing limit for each requisition line (approvals are at the line level)
  - If within the limit, each line status as well as the requisition header status are set to APPROVED
  - If exceeding the limit, the line status and header status remain REQUESTED, and they roll up to the requestor’s supervisor for approval

- The line is approved by the supervisor, but if the amount exceeds the supervisor’s limit, the process continues up the chain until someone with a sufficient dollar limit approves the requisition line
PURCHASE REQUISITION APPROVAL FORM

1. Navigate to the supervisors section.
2. Select the Purchase Requisition Approval.

PREQ Information
- PREQ Number
- Next Approver
- Status

Line Items
- Approve
- Reject
- Line
- Description
- Status
- Line Amount

Comments:

Total:
1. Access the *Purchase Requisition Approval* form from the Navigator screen. The data displayed on this form will be based on the person that has signed on to the system. Any FM supervisor/manager who has people reporting to them will have access to the *Purchase Requisition Approval* form.

2. To display all purchase requisitions awaiting your approval, execute an “unqualified query” by clicking the *Enter Query* icon and then the *Execute Query* icon or press the F7 and then the F8 key. Use the pg dn and pg up keys to scroll through the requisitions needing approval. Also query on the *Next Approver* field or the *PREQ Number* field if desired. When a purchase requisition is displayed there will be one or more lines from that requisition that require approval or rejection.

Reference Fields:

- **PREQ Number**: PREQ number to be approved.
- **Unlabeled field**: Short description of the PREQ.
- **Next Approver**: The next person needed to approve the purchase requisition. This field is filled in automatically based on the supervisor hierarchy. The field will be cleared once the purchase requisition is approved.
3. To view the entire description of each line on the purchase requisition, put your cursor on the description and press the Ctrl key and the E key. Clicking the View Line button will bring up the purchase requisition Line Item form to view the work order number, vendor, and the detailed description, quantity, etc.

4. When the approve checkbox is checked and the Approve/Reject button is pressed, a pop-up message confirming the approval appears; click OK. The requisition's status will change to APPROVED and the Next Approver field will be blank. When the approver next accesses the Purchase Requisition Approval form, this record will not be displayed. When the approver tries to approve a requisition line that exceeds their purchasing limit, the status of the line will remain REQUESTED and the Next Approver field will be updated to the approver's supervisor/manager. This requisition will continue to appear in the Purchase Requisition Approval form until it has finally been approved.

Reference Fields:

- Status: Changes automatically when the system compares the requisition line amount with the individual's approval limit.
PURCHASE REQUISITION APPROVAL FORM

PREQ Information
- PREQ Number: PRQ136172
- Next Approver: STUDENT02
- Status: REQUESTED

Line Items
1. Approve: Yes
   - Description: REPLACE UPS FOR AUTOMATION SYSTEM IN...
   - Status: REJECTED
   - Line Amount: 3,500.00

Comments: GET A QUOTE FROM ONE MORE VENDOR

Buttons:
- Approve/Reject
- View Line
5. To reject a requisition line, click the **Reject** checkbox next to the line and click the **Approve/Reject** button.

6. If a line is rejected, comments should also be entered in the **Comment** field. Note: These comments can be viewed on the **Purchase Requisition** form by the requestor so that they can take further action. A rejected line is still considered an active purchase requisition line. A Requestor whose purchase requisition line is rejected should either change it and re-submit it for approval, or cancel it. **NOTE:** Recommendation is to NOT reject the PREQ, but instead, contact the requestor, discuss your concerns and have requestor modify the PREQ.

Reference Fields:

- **Previously Approved Amt.**: Not currently being used.
- **Line**: The line number of the PREQ.
- **Description**: The line description of the PREQ. To view the entire description press the **ctrl** button and **E** key to open an Editor window or click the **View Line** button to bring up the purchase requisition **Line Item** form.
- **Status**: Auto-filled status of each line on the PREQ.
- **Line Amount**: The amount listed on each line of the PREQ.
- **Total**: PREQ total of all the lines amounts.
Access the *Purchase Requisition* form and review the **Status** field for each line.

Clicking the **Approval Routing** button displays all approvals and rejections as well as any comments written by the approver. Press the **Ctrl** and **E** key to view the comments in an Editor box.
Requisition lines may have multiple approvals if they had to be approved by more than one individual.

If a line was rejected, the original requestor becomes the Next Approver. The requestor can make changes to the requisition detail and approve it again, which will update the status to REQUESTED, or the line can be canceled if needed.
EXERCISE 1
1. Access the Purchase Requisition Approval form from the Navigator screen
2. Press the F7 then the F8 key
3. Check the Approve checkbox next to the line number
4. Click the Approve/Reject button
5. Click OK to confirm
7. Copy the PREQ number and minimize the *Purchase Requisition Approval* form
8. Access the *Purchase Requisition* form from the Navigator screen
9. Enter a query and paste the PREQ number in the PREQ Number field then execute the query
10. Click the **Approval Routing** button to view the approval data
11. Return to the *Purchase Requisition Approval* form
12. Press the **pg dn** key on the keyboard to scroll to the next PREQ needing approval
13. Click the **Approve** checkbox and then click the **Approve/Reject** button
14. Repeat #7 and #8 until all PREQs requiring approval have been processed
The End!!!

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