EXAMPLES NEEDED FOR TRAINING

1. Assign the Student IDs starting with STUDENT02. Each student will be approving a POCO that were created in U224 PO Change Order training.

Slide 6: Review the POCO Approval form.

Slide 12: Allow the students to complete the exercise and view the approval routing.
U234 PO CHANGE ORDER APPROVAL

SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

Why must a PO change order be approved or rejected?

- Purchasing cannot place the PO change order until it has been approved. Once the POCO has been approved, Purchasing will change the amount on the Purchase Order and invoices against it can be approved and the Purchase Order can be closed if needed.
- A PO change order will roll up to the Next Approver if the PO change order amount exceeds the requestor’s purchasing limit.

When should a PO change order be approved or rejected?

- As soon as possible; not doing so can delay the payment of invoices.
- Supervisors should check frequently for PO change orders requiring their approval.
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PO CHANGE ORDER APPROVAL FORM
1. Access the *PO Change Order Approval* form from the Navigator screen. Note that the *Next Approver* field is automatically set to your username.

2. To view PO change orders awaiting your approval, make sure the **My approvals only** radio-button is checked. If you wish to view PO change orders awaiting your and your subordinates’ approval, check the **Mine and subordinates’ approvals** radio-button. You can approve or reject PO change orders for your subordinates. If the PO Number or CO Number are known, you can enter these as well; entering these fields is not required. A LOV is available (press the F9 key to view) for each field; note that the LOV only list those POs/POCOs that are rolling up to you or your subordinates. Without entering the query-mode, press the **Find** button. At this point COMPASS will perform a query for the desired POCOs awaiting your and/or your subordinates’ approval.

Reference Fields:

- **Line**: The POCO line number
- **Description**: The POCO line description.
- **Change Amount**: The dollar amount, per unit.
- **Unit Price**: If this is a “New Line” PO change order, the dollar amount, per unit is displayed here.
PO CHANGE ORDER APPROVAL FORM
3. If there is more than one POCO awaiting approval, navigate through the records using the Next CO and Previous CO buttons.

4. Enter comments in the Comments field if desired. This may be useful to communicate information about the PO change order to a supervisor, your subordinate, or FM Purchasing. Comments are visible on the POCO routing history. This can be accessed via PO Change Order Approval form>History tab or Purchase Order form>Change Orders button>View Approvals button.

Reference Fields:

- **Quantity**: The quantity for this line.
- **Changed**: The calculation of (Quantity * Change Amount).
- **Unit Price check-box**: This box is checked if this is a “Unit Price” change order line.
- **Approval Limit**: Your approval limit. If this PO change order has rolled to you, but is greater than your approval limit, the PO change order will roll to your supervisor for approval.
- **Total PO Change Amount**: The summation of the Changed field.
PO CHANGE ORDER APPROVAL FORM
5. Click the **Routing** button to view the PO change order’s routing history. Click the **OK** button to return to the *PO Change Order Approval* form. Fields visible on the *Routing History* form include:

- **Date**: Date of the action.
- **User**: Username of the individual processing the action.
- **Status**: The PO change order routing status.
- **Comments**: The comments, if entered, for this routing transaction.

6. Click the **Approve** button to approve the PO change order, or click the **Reject** button to reject the PO change order. If you do not have sufficient approval authority to be the final approver for the POCO, clicking the **Approve** button will cause the POCO to roll to your supervisor. If you reject the POCO, it is still considered an OPEN POCO, which the requester must update and resubmit, or must cancel.

If a POCO rolls up more than two levels, it cannot be automatically seen by the third approver without a direct query; it’s best to always advise your supervisor of the POCO awaiting their review and approval.
EXERCISE 1

1. Access the *PO Change Order Approval* form from the Navigator screen
2. Click the **My approvals only** radio button
3. Click the **Find** button
4. Enter a comment in the **Comments** field
5. Click the **Approve** button
7. Highlight and copy the PO Number
8. Open the **Purchase Order** form from the Navigator screen
9. Initiate a query, paste in the PO Number, then execute the query
10. Click the **Chg Order** button
11. Click the **View Approvals** button to view status of approvals
The End!!

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