Overview

A new enhancement has been made and released to the UConn KFS environment that will give the Fiscal Officers the opportunity to Approve/Disapprove amendments to Purchase Orders which affect their accounts.

This enhancement will send the amendment to the Fiscal Officers action list, which you may already have seen. Fiscal Officers will be able to review notes, changes and associated support documentation that the Procurement Services team member has initiated. The only changes that the Fiscal Officer will be allowed to make is to the accounting information within the submitted document. The existing rules governing the original PO edoc will remain in place, just as with any other KFS document, where an FO can only change the account to one that they own. If other changes are needed, the FO will need to disapprove the document with a note back to the Purchasing Department as to why it is being disapproved.

Since the Purchase Order Amendment is a new document to the Fiscal Officer, this communication will show what the document looks like and the actions that can be taken by the FO.
Purchase Order Amendment

The Fiscal Officer will now see the Purchase Order Amendments in their Action List in KFS.

The top of the POA will look similar to a Requisition

This information holds the requester information and delivery address.
This next group of tabs contains the information pertinent to the Item(s) ordered along with the Accounting information. Please note, the accounting information is the only data that the Fiscal Officer can change.

The next sections contain information specifically for the Purchase Order. If there is information that the Procurement Services team member has added to the tabs, they will be open for your review.

Please note the NOTES section. This is where you will find out why the amendment was processed.
At the bottom of the document are the buttons that can be selected to Approve or Disapprove. If any accounting changes are made to the document, you must select CALCULATE prior to Approving. In line with the other KFS documents, if the document is disapproved, the Procurement Services Department will get a notification and they would have to create a new document. Please note that if there are other accounts on the amendment, all Fiscal Officers must Approve before it becomes Final.

Please contact the HuskyBuy Help Desk at 486-2BUY (6-2289) or Nancy Patrylak at 6-2622 for further information or assistance regarding this enhanced functionality.

Matt Larson, Director of Procurement Services