

**Subject:** Instructions to Display Purchase Orders with a Status of Error in Process and Saved

**Audience:** Supplier Relationship Management (SRM) Users

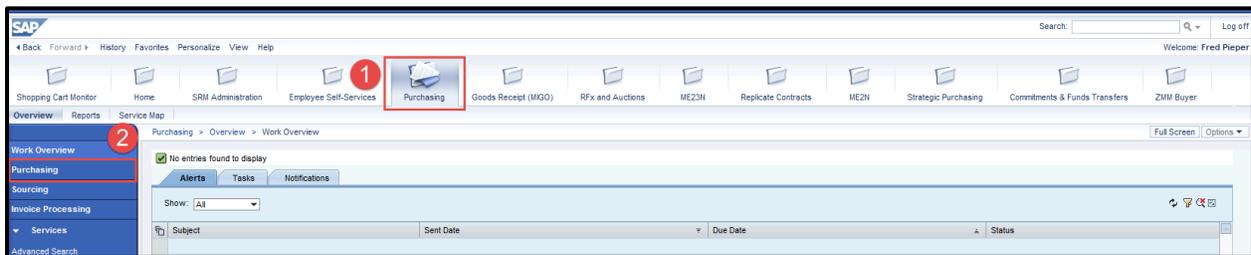
The SCEIS Materials Management Team has created the following Help Document to assist users with displaying Purchase Orders (POs) that have a status of Error in Process or Saved. This document should be used year-round to assist Procurement Directors and buyers with managing POs in these statuses. This document becomes extremely useful during the year-end process to identify POs with these two statuses. All POs must be in an ordered status for SRM to replicate the PO to ECC (Enterprise Central Component). Once the PO is in an ordered status, the agency can then make the determination to leave the PO in the current year and take the necessary steps to properly prepare the PO to remain in the current year or to carry forward the PO.

**Instructions to Display Purchase Orders with a Status of Error in Process and Saved**

**Example 1**

**Step 1**

From the SRM Purchasing folder, select **Purchasing** in the “Detailed Navigation Pane.”



**Step 2**

After you select Purchasing from the “Detailed Navigation Pane,” the screen will display the Personal Object Worklist, (POWL). From the POWL’s Active Queries, select **Purchase Orders, All**.



**Step 3**

From the POWL, Active Queries' Purchase Order - All, we will search for the following data:

1. **Status:** In this example, first we will search for "Transfer Failed." This is also the drop-down you would use to search for POs in the "Saved" status.

**Purchase Orders - All**

▼ Hide Quick Criteria Maintenance

Number:  To

Purchase Order Name:

Item Description:

Status:

Timeframe:

Creation Date:  To

Purchasing Organization:

Purchasing Group:  To

Supplier:

Requestor:

Preferred Supplier:

Goods Recipient:

2. **Creation Date:** In this example, we will search for POs created from 07/01/2014 through 05/19/2015.
3. **Purchasing Group:** In this example, we will search for the SRM Purchasing Groups that represent Health and Human Services.

With the above data elements in the search criteria the POWL's search criteria appears as:

**Active Queries**

Shopping Carts [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Public Templates \(0\)](#) [Recommended Items \(0\)](#) [POWL Refresh saved \(0\)](#)

Purchase Orders [All \(4\)](#) [Saved \(0\)](#) [Awaiting Approval \(28\)](#) [Rejected \(7\)](#) [Ordered \(775\)](#) [Confirmations pending \(0\)](#)

Purchase Order Responses [All \(0\)](#) [Rejected by Supplier \(0\)](#) [Partially Confirmed \(0\)](#) [Unconfirmed Orders \(0\)](#) [Variance in Response \(0\)](#) [Confirmed by supplier \(0\)](#) [Noted By Supplier \(0\)](#)

Confirmations [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Approved \(0\)](#) [Rejected \(0\)](#) [Deleted \(0\)](#) [Confirmations for Team Carts \(0\)](#)

Document Output [Last 7 Days \(0\)](#)

---

**Purchase Orders - All**

▼ Hide Quick Criteria Maintenance

Number:  To

Purchase Order Name:

Item Description:

Status:

Timeframe:

Creation Date:  To

Purchasing Organization:

Purchasing Group:  To

Supplier:

### Step 4

After you have the data you need for your agency and situation, and then select the “Apply” button at the lower left corner of the screen.

The screenshot shows a web-based form for creating or editing a purchase order. The form contains the following fields and controls:

- Number: [text input] To [text input]
- Purchase Order Name: [text input]
- Item Description: [text input]
- Status: [dropdown menu, value: Transfer Failed]
- Timeframe: [dropdown menu]
- Creation Date: [calendar icon] 07/01/2014 To [calendar icon] 05/19/2015
- Purchasing Organization: [text input]
- Purchasing Group: [calendar icon] O 50015746 To [calendar icon] O 50015750
- Supplier: [text input]
- Requestor: [text input]
- Preferred Supplier: [text input]
- Goods Recipient: [text input]
- Product Category: [text input]
- Including Product Category Hierarchy:
- Product ID: [text input]
- Supplier Product Number: [text input]
- Account Assignment Category: [dropdown menu]
- Account Assignment Value: [text input]
- Delivery Date: [calendar icon] To [calendar icon]
- Company: [text input]
- Contract Number: [text input]
- Location: [text input]
- Requirement Number: [text input]
- Only with Change Version:
- Smart Number: [text input]

At the bottom left of the form, there are two buttons: "Apply" and "Clear". The "Apply" button is highlighted with a red box.

Note: The system may require a few minutes to retrieve the data, depending upon your search criteria.

In this example, the results retrieved 2 POs with Error in Process, 4600368791 and 4600362297.

Purchase Orders - All

Hide Quick Criteria Maintenance Change Query Define New Query Personalize

Number:  To

Purchase Order Name:

Item Description:

Status: **Transfer Failed**

Timeframe:

Creation Date:  07/01/2014 To  05/19/2015

Purchasing Organization:

Purchasing Group:  O 50015746 To  O 50015750

Supplier:

Requestor:

Preferred Supplier:

Goods Recipient:

Product Category:

Including Product Category Hierarchy:

Product ID:

Supplier Product Number:

Account Assignment Category:

Account Assignment Value:

Delivery Date:  To

Company:

Contract Number:

Location:

Requirement Number:

Only with Change Version:

Smart Number:

Apply Clear

View: [Standard View] Create Purchase Order Create with Reference Copy Display Edit Delete Purchase Order Response Notify Recipient Print Preview Refresh Export

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4600368791	Tapfn ICD-10 9/8/14	1	ICD-10	Error in Process	TAPFIN	675,000.00	USD
4600368791	Tapfn ICD-10 9/8/14	2	ICD-10	Error in Process	TAPFIN	675,000.00	USD
4600362297	Toner for Renee Gray 08132014	1	HP Cartridge CB436A	Error in Process	MANAGEDPRINT INC	400.00	USD
4600362297	Toner for Renee Gray 08132014	2	HP Cartridge MP5949A	Error in Process	MANAGEDPRINT INC	400.00	USD

**Step 5**

Now, in this example, we will select 4600368791 to display the PO. The system will indicate the PO in Display mode. From Display Purchase Order, select the “**Check**” button to see the red hard-stop message(s).

**Display Purchase Order**

Purchase Order Number: 4600368791   
 Purchase Order Type: Blanket PO   
 Status: Error in Process   
 Document Date: 09/08/2014   
 Total Value (Gross): 675,000.00 USD

Overview | Header | Items | Notes and Attachments | Approval | Tracking

**General Header Data**

Smart Number: Tapfin ICD-10 9/8/14  
 Smart Number is External  
 Purchase Order Number: 4600368791  
 Supplier: \* 7000083532 TAPFIN  
 Requester: \* 16272 Mr. EDMOND BROWN III  
 Recipient: 16272 Mr. EDMOND BROWN III  
 Location: 10032 Department of Health & Human Services  
 Ship-To Address: 94 SCDHHS  
 Purchasing Organization: \* SCEIS Purchasing Organization  
 Purchasing Group: \* HHS - Procurement Director Show Members  
 Total Value (Net): 675,000.00 USD  
 Default Settings: Set Values

Note to Supplier:

Internal Note: SCEIS Ticket 826434 for non-valuated GR Fred Pieper

▼ Item Overview

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Or
1		Material	1		ICD-10	95800	146,945.50	EA	USD	1	1.00		
2		Material	2		ICD-10	95800	528,054.50	EA	USD	1	1.00		

In this example, the annual budget is exceeded. Please work with your Finance team members and make the appropriate changes.

**Display Purchase Order**

Purchase Order Number: 4600368791   
 Purchase Order Type: Blanket PO   
 Status: Error in Process   
 Document Date: 08.09.2014   
 Total Value (Gross): 675,000.00 USD

Overview | Header | Items | Notes and Attachments | Approval | Tracking

**Example 2**

**Step 1**

In this example, we will select 4600362297 to display the PO.

The screenshot shows a web-based purchasing application. At the top, there is a breadcrumb trail: **Purchasing > Overview > Purchasing**. Below this is a search and filter section with various fields:

- Status: Transfer Failed
- Timeframe: [Dropdown]
- Creation Date: 01.07.2014 To 14.05.2015
- Purchasing Organization: [Dropdown]
- Purchasing Group: 0 50015746 To 0 50015750
- Supplier: [Dropdown]
- Requestor: [Dropdown]
- Preferred Supplier: [Dropdown]
- Goods Recipient: [Dropdown]
- Product Category: [Dropdown]
- Including Product Category Hierarchy: [Checkbox]
- Product ID: [Text]
- Supplier Product Number: [Text]
- Account Assignment Category: [Dropdown]
- Account Assignment Value: [Text]
- Delivery Date: [Text] To [Text]
- Company: [Dropdown]
- Contract Number: [Text]
- Location: [Dropdown]
- Requirement Number: [Text]
- Only with Change Version: [Checkbox]
- Smart Number: [Text]

Below the filters are buttons for **Apply** and **Clear**. Underneath is a toolbar with options: **View: [Standard View]**, **Create Purchase Order**, **Create with Reference**, **Copy**, **Display**, **Edit**, **Delete**, **Purchase Order Response**, **Notify Recipient**, **Print Preview**, **Refresh**, and **Export**.

The main area contains a table with the following data:

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4600368791	Tapfin ICD-10 9/B/14	1	ICD-10	Error in Process	TAPFIN	675,000.00	USD
4600368791	Tapfin ICD-10 9/B/14	2	ICD-10	Error in Process	TAPFIN	675,000.00	USD
4600362297	Toner for Renee Gray 08132014	1	HP Cartridge CB436A	Error in Process	MANAGEDPRINT INC	480.00	USD
4600362297	Toner for Renee Gray 08132014	2	HP Cartridge MPS949A	Error in Process	MANAGEDPRINT INC	480.00	USD

**Step 2**

The system will indicate the PO in Display mode. From Display Purchase Order, select the “Check” button to see the red hard-stop message(s).

**Display Purchase Order**

[Edit](#) | [Print Preview](#) | [Check](#) | [Close](#) | [Export](#) | [Delete](#) | [Related Links](#)

⚠ Address data has changed - [Display Help](#)

**Purchase Order Number:** 4600362297   
**Purchase Order Type:** SCEIS Standard PO   
**Status:** Error in Process   
**Document Date:** 08/13/2014   
**Total Value (Gross):** 518.40 USD

[Overview](#) | [Header](#) | [Items](#) | [Notes and Attachments](#) | [Approval](#) | [Tracking](#)

**General Header Data**

Smart Number: Toner for Renee Gray 0813201  
 Smart Number is External

Purchase Order Number: 4600362297

Supplier: \* 7000064751 [MANAGEDPRINT INC](#)

Requester: \* 21834 [YOLANDA RICHARDSON](#)

Recipient: 21834 [YOLANDA RICHARDSON](#)

Location: 10032 [Department of Health & Human Services](#)

Ship-To Address: 94 [Dept Health & Human Services](#)

Purchasing Organization: \* [SCEIS Purchasing Organization](#)

Purchasing Group: \* [HHS - Leon Hines](#) [Show Members](#)

Total Value (Net): 480.00 USD

Default Settings: [Set Values](#)

Note to Supplier: Please deliver to the attention of Renee Gray. The telephone number is (843) 381-8260, ext. 164.

Internal Note: For questions regarding this PO, please contact Veronica Richardson at (843) 381-8260.

▼ **Item Overview**

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Or
1		Material	1		HP Cartridge CB436A	20772	6.00	EA	USD	1	50.00		
2		Material	2		HP Cartridge MP5949A	20772	6.00	EA	USD	1	30.00		

In this example, the error is generated with how the system calculates the sum of the amounts in Account Assignment Details' values. (See the screen shot below.)

**Display Purchase Order**

[Edit](#) | [Print Preview](#) | [Check](#) | [Close](#) | [Export](#) | [Delete](#) | [Related Links](#)

Back-End Error:Purchase order still contains faulty items  
 Back-End Error:Sum of amounts 84.78 less than total amount 180.00
 
  
 Cannot determine valid serial number - [Display Help](#)  
 Line 1: Delivery date not possible; check your entry  
 Line 2: Delivery date not possible; check your entry

**Purchase Order Number** 4600362297    **Purchase Order Type** SCEIS Standard PO    **Status** Error in Process    **Document Date** 08/13/2014    **Total Value (Gross)** 518.40 USD

[Overview](#) | [Header](#) | [Items](#) | [Notes and Attachments](#) | [Approval](#) | [Tracking](#)

**General Header Data**

Smart Number:     Note to Supplier: Please deliver to the attention of Renee Gray. The telephone number is (843) 381-8260, ext. 164.  
 Smart Number is External

Purchase Order Number:     Internal Note: For questions regarding this PO, please contact Veronica Richardson at (843) 381-8260.

Supplier: \*  [MANAGEDPRINT INC](#)

Requester: \*  [YOLANDA RICHARDSON](#)

Recipient:  [YOLANDA RICHARDSON](#)

Location:  [Department of Health & Human Services](#)

Ship-To Address:  [Dept Health & Human Services](#)

Purchasing Organization: \*

Purchasing Group: \*  [Show Members](#)

Total Value (Net):  USD

Default Settings: Set Values

**Item Overview**

[Details](#) | [Add Item](#) | [Copy](#) | [Paste](#) | [Duplicate](#) | [Delete](#) | [Undelete](#) | [Propose Sources of Supply](#) | [Add Condition](#) | [Remove Condition](#) | [Exercise Option](#) | [Order as Direct Material](#) | [Pro](#)

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Order
1		Material	1		HP Cartridge CB436A	20772	6.00	EA	USD	1	50.00		
2		Material	2		HP Cartridge MP5949A	20772	6.00	EA	USD	1	30.00		

In this example, the Account Assignment Details' values do not represent line numbers 1 through 4. (See the screen shot below.) The Account Assignment Details' values line numbers are 0001 and 0004. The numerical amount of 0001 plus 0004 is \$84.78.

**Step 3**

The Account Assignment Details' values line numbers need to be re-keyed as 0001, 0002, 0003 and then 0004 for the amounts that equal \$180.00.

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type
1		Material	1		HP Cartridge CB436A	20772	6.00	EA	USD	1	50.00					09/19/2014	Multiple
2		Material	2		HP Cartridge MP5949A	20772	6.00	EA	USD	1	30.00					09/19/2014	Multiple

Number	Accounting Line Number	Value	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description	Business Area
0001		3.78	Cost Center	J020E0004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020
0004		81.00	Cost Center	J020E0004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020
0004		14.22	Cost Center	J020E0004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020
0004		61.00	Cost Center	J020E0004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020

In summary, after the PO is in Display mode, select the “Check” button to see the error message(s).

**Display Purchase Order**

⚠ Address data has changed - Display Help

Purchase Order Number 4600362297    Purchase Order Type SCEIS Standard PO    **Status Error in Process**    Document Date 08/13/2014

Each error message will need to be resolved until the PO is in an ordered status. Once the PO is in an ordered status, the agency can then make the determination to leave the PO in the current year. The agency will then need to take the necessary steps to properly prepare the PO to remain in the current year or to carry forward the PO.

If you have questions about using this functionality, please contact the SCEIS Help Desk at (803) 896-0001 (select option 1 for SCEIS help) or use the email form available at <http://www.sceis.sc.gov/requests/>.

Thank you,  
The SCEIS Team