Subject: How 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 <u>Error in Process</u> or <u>Saved</u>. 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.

<u>**How to Display Purchase Orders with a Status of Error in Process and Saved**</u>
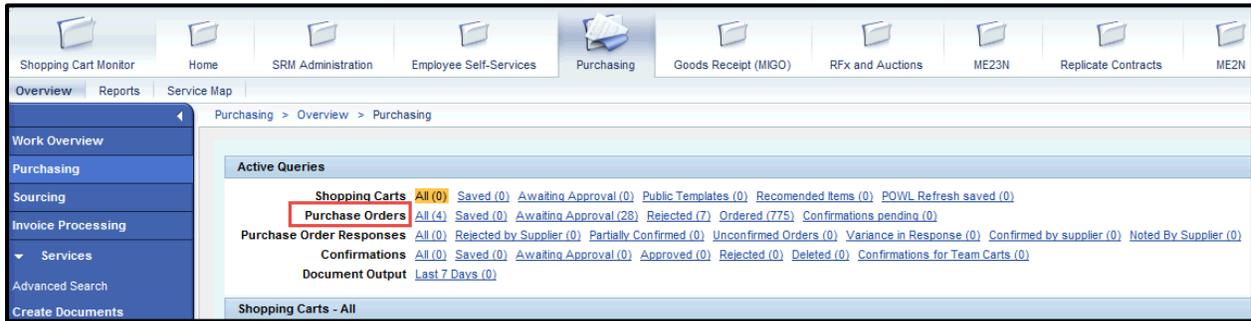
<u>**Example 1**</u>

Step 1
From the SRM Purchasing folder, then 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.
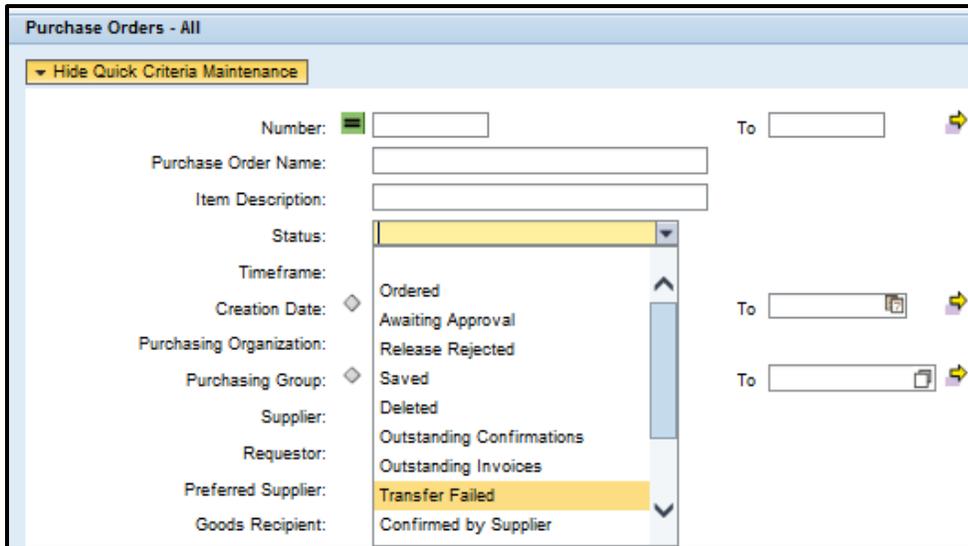
2. **Creation Date:** In this example, we will search for POs created from 07/01/2014 through 05/19/2015.

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:

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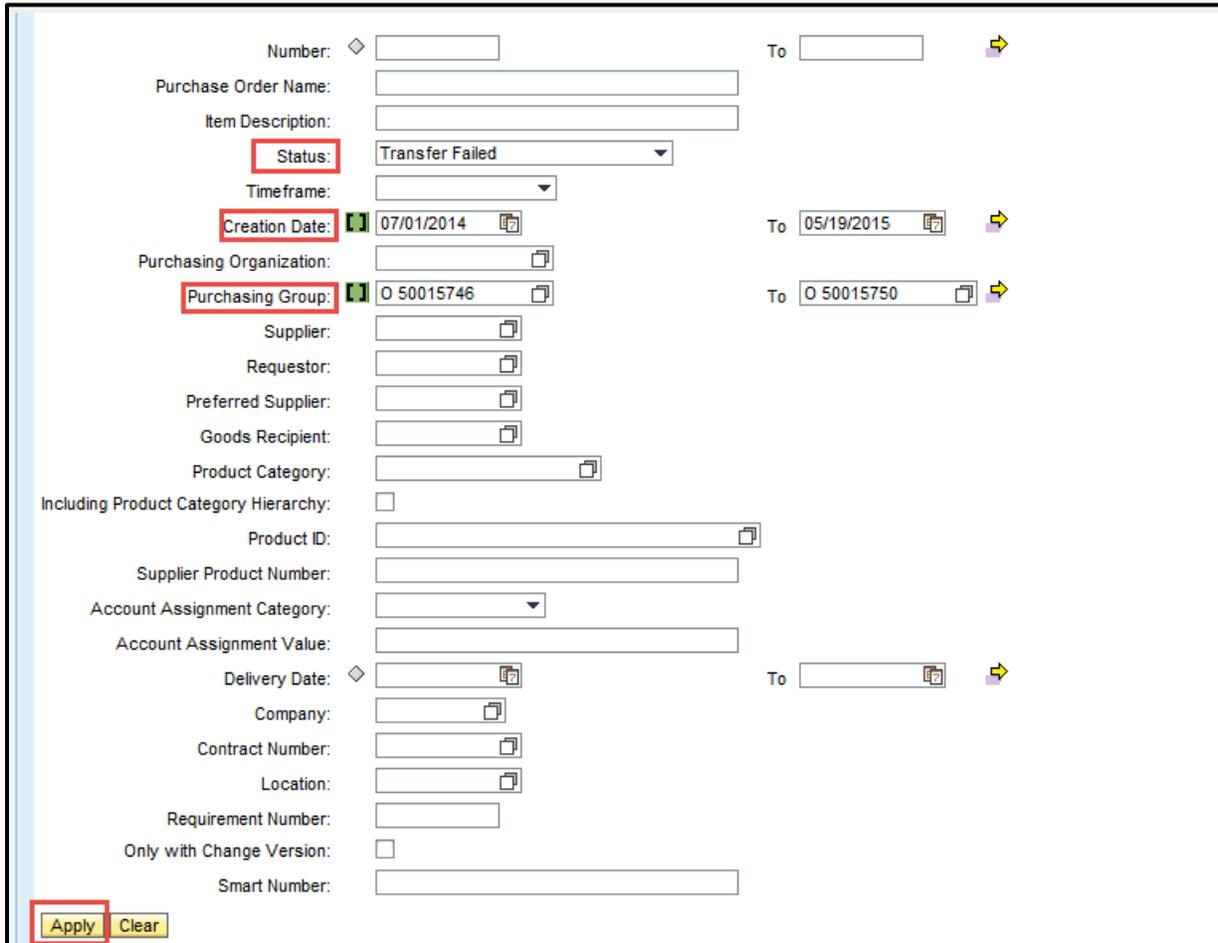
Note: The system may require a few minutes to retrieve the data, depending upon your search criteria.

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

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).

In this example, the annual budget is exceeded. Please work with your Finance team members and make the appropriate changes.
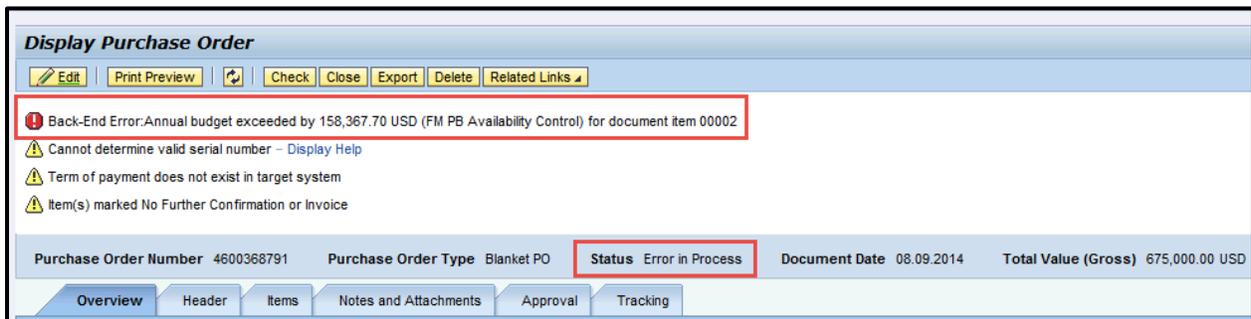
Example 2

Step 1
In this example, we will select 4600362297 to display the PO.

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).

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.)

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.

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

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