

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 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.

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

Example 1

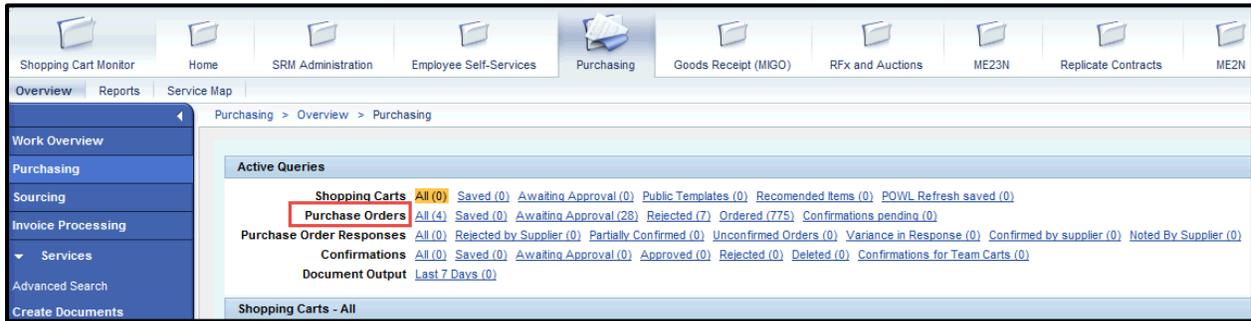
Step 1

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



Step 2

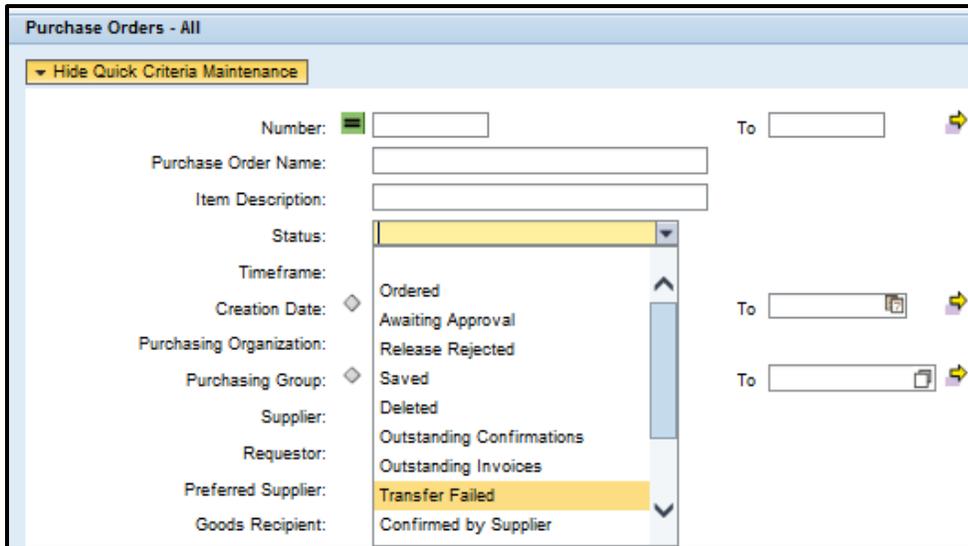
After you select Purchasing from the “Detailed Navigation Pane,” the screen will display the Personal Object Worklist, (POWL). From the POWL’s Active Queries, select **Purchase Orders, All**.



Step 3

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

- 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.



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

Weekly Update

May 27, 2015

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 \(0\)](#)

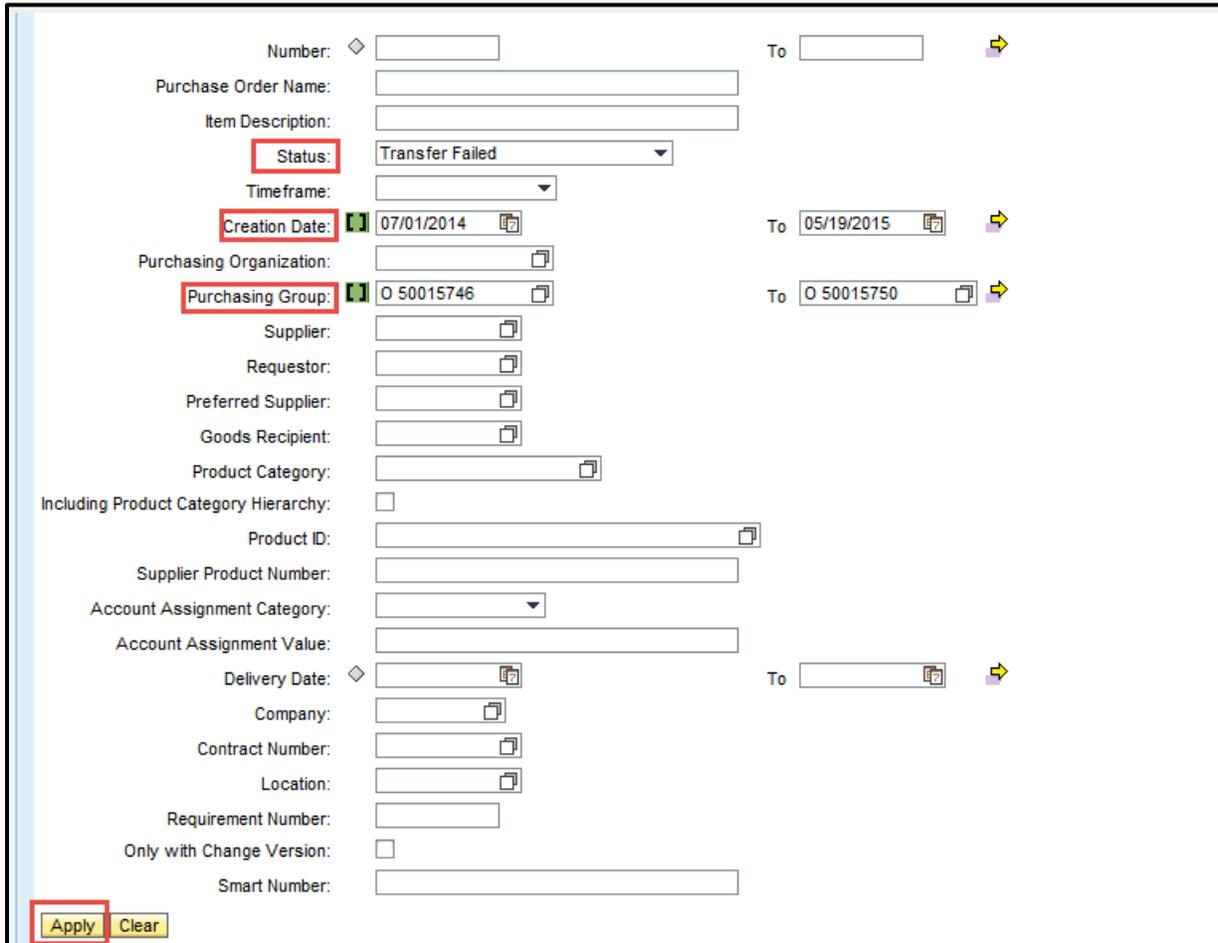
Purchase Orders - All

▼ Hide Quick Criteria Maintenance

Number: <input type="text"/>	To: <input type="text"/>
Purchase Order Name: <input type="text"/>	
Item Description: <input type="text"/>	
Status: Transfer Failed ▼	
Timeframe: <input type="text"/>	
Creation Date: 07/01/2014 <input type="text"/>	To: 05/19/2015 <input type="text"/>
Purchasing Organization: <input type="text"/>	To: <input type="text"/>
Purchasing Group: O 50015746 <input type="text"/>	To: O 50015750 <input type="text"/>
Supplier: <input type="text"/>	

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.



Number: To

Purchase Order Name:

Item Description:

Status:

Timeframe:

Creation Date: To

Purchasing Organization:

Purchasing Group: To

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:

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

Weekly Update

May 27, 2015

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:

Timeframe:

Creation Date: To

Purchasing Organization:

Purchasing Group: To

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:

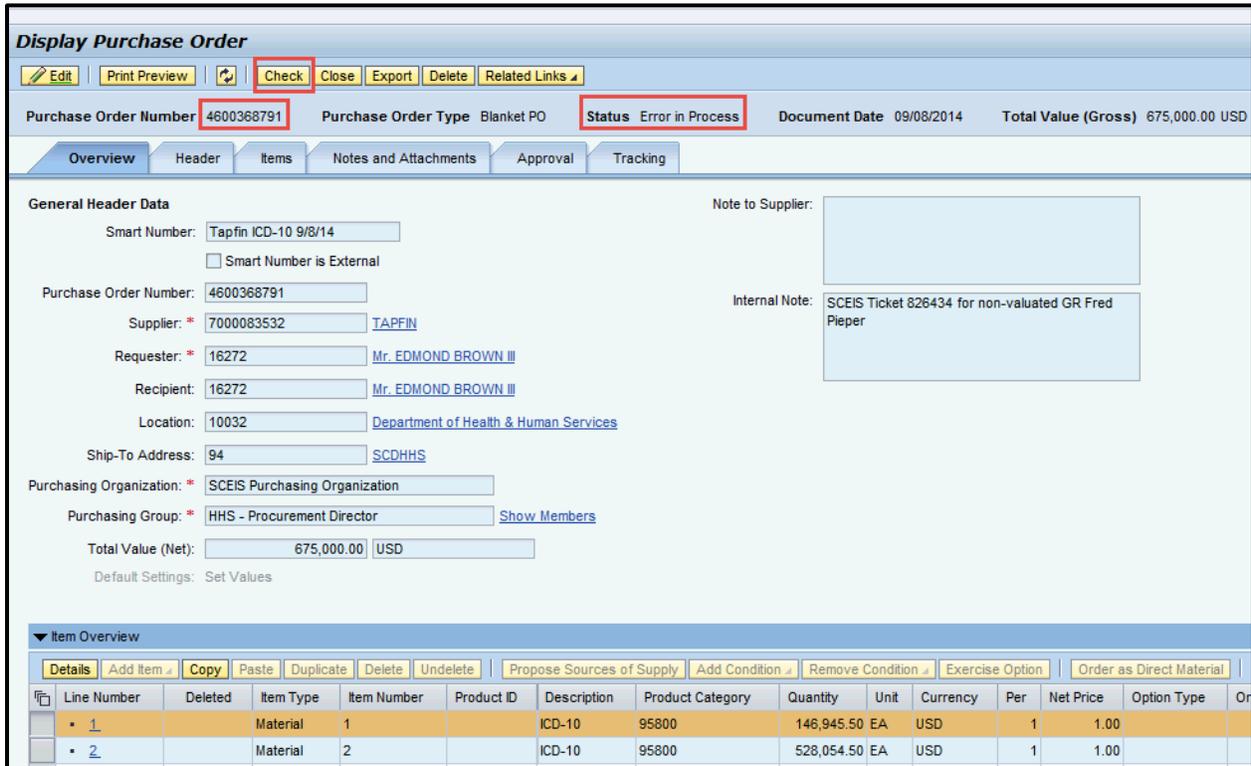
Apply Clear

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	TapIn ICD-10 9/5/14	1	ICD-10	Error in Process	TAPFIN	675,000.00	USD
4600368791	TapIn ICD-10 9/5/14	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 MP5949A	Error in Process	MANAGEDPRINT INC	480.00	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

Edit | Print Preview | Check | Close | Export | Delete | Related Links

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:

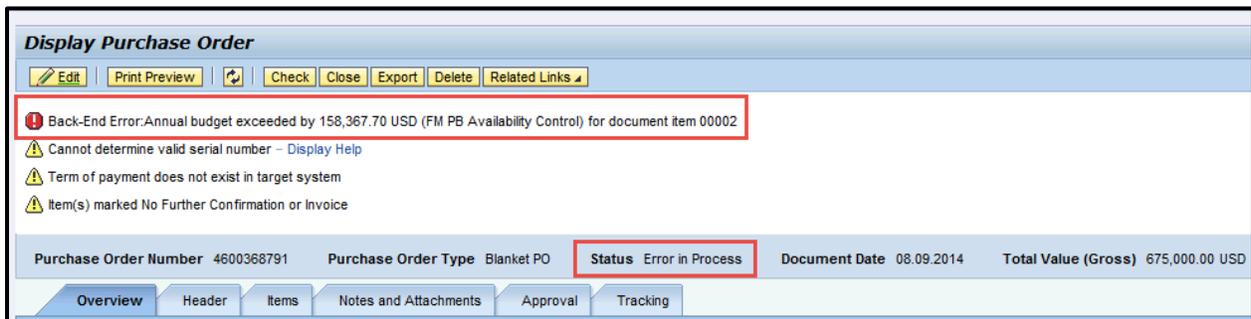
Internal Note: SCEIS Ticket 826434 for non-valuated GR Fred Pieper

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Delete | Undelete | Propose Sources of Supply | Add Condition | Remove Condition | Exercise Option | Order as Direct Material

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

Edit | Print Preview | Check | Close | Export | Delete | Related Links

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

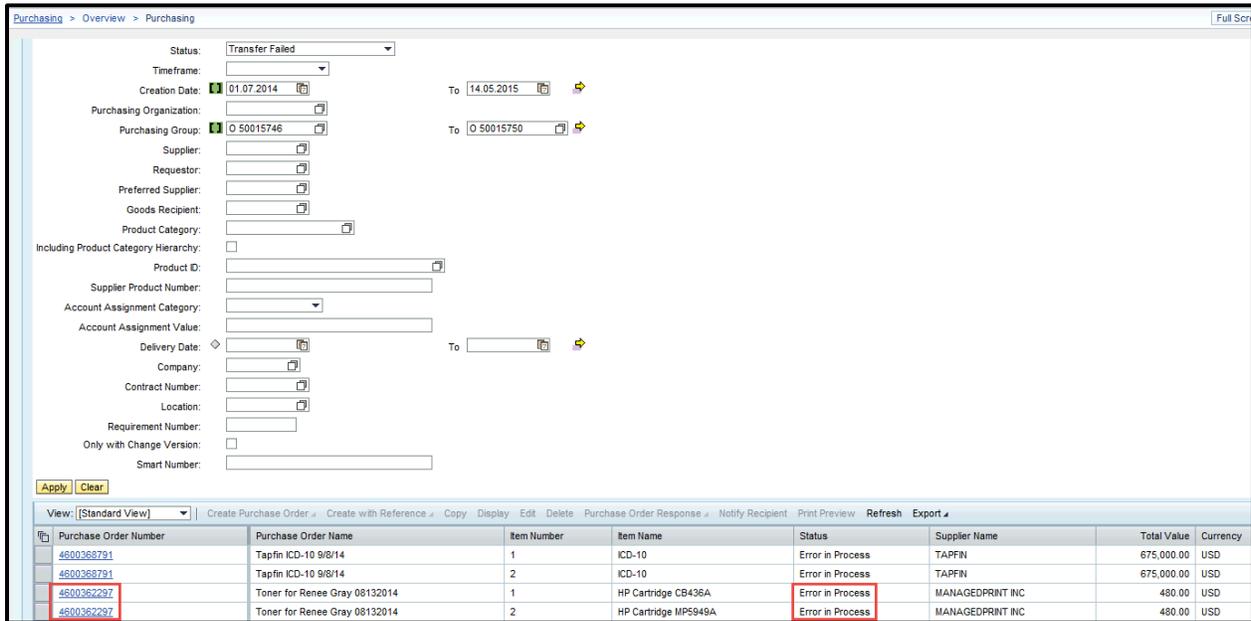
Overview | Header | Items | Notes and Attachments | Approval | Tracking

! Back-End Error: Annual budget exceeded by 158,367.70 USD (FM PB Availability Control) for document item 00002
! Cannot determine valid serial number - Display Help
! Term of payment does not exist in target system
! Item(s) marked No Further Confirmation or Invoice

Example 2

Step 1

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



The screenshot shows the SOEIS Purchasing interface. 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, Creation Date (01.07.2014 to 14.05.2015), Purchasing Organization, Purchasing Group (0 50015746 to 0 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, Company, Contract Number, Location, Requirement Number, Only with Change Version, and Smart Number. There are 'Apply' and 'Clear' buttons below these fields.

Below the search section is a menu bar 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 part of the screenshot is a table of purchase orders. The table has columns for Purchase Order Number, Purchase Order Name, Item Number, Item Name, Status, Supplier Name, Total Value, and Currency. The PO number 4600362297 is highlighted in red in the first column. The status 'Error in Process' is also highlighted in red for the items associated with this PO.

Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4600368791	Tapfin ICD-10 9/8/14	1	ICD-10	Error in Process	TAPFIN	675,000.00	USD
4600368791	Tapfin 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	480.00	USD
4600362297	Toner for Renee Gray 08132014	2	HP Cartridge MP5949A	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:
 Smart Number is External

Purchase Order Number:

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):

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**

Details | Add Item | Copy | Paste | Duplicate | Delete | Undelete | Propose Sources of Supply | Add Condition | Remove Condition | Exercise Option | Order as Direct Material | Print

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.

The screenshot displays a Purchase Order for 4600362297, Status: Error in Process. It shows two line items for HP Cartridges. Below, the 'Account Assignment' section shows a table with the following data:

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	J020E00004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020
0004		81.00	Cost Center	J020E00004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020
0004		14.22	Cost Center	J020E00004	Elig & Enroll 4	5030060000	DATA PROCESS SUPP	J020
0004		81.00	Cost Center	J020E00004	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).

The screenshot shows the 'Display Purchase Order' interface. At the top, there are buttons for Edit, Print Preview, Check (highlighted with a red box), Close, Export, Delete, and Related Links. Below the buttons, a warning message states: 'Address data has changed - Display Help'. At the bottom, the PO details are shown: Purchase Order Number 4600362297, Status Error in Process (highlighted with a red box), and 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.

Weekly Update

May 27, 2015

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