

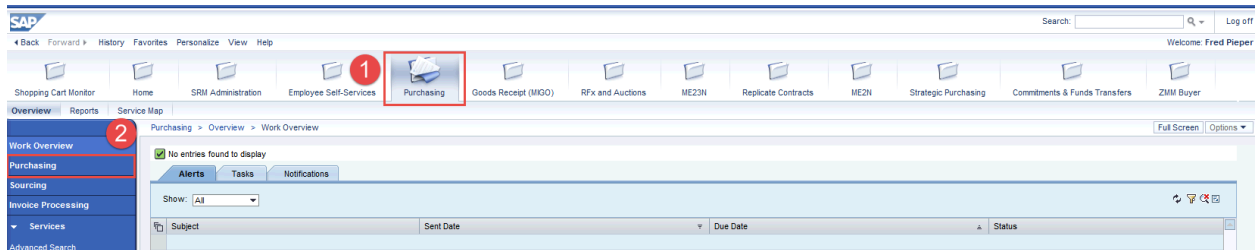
## How to Display Purchase Orders with a Status of Error in Process and Saved

**Purpose:** The following SCEIS Help Document is designed to assist the 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. Once the PO is in an ordered status then the agency can 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.

### Example 1

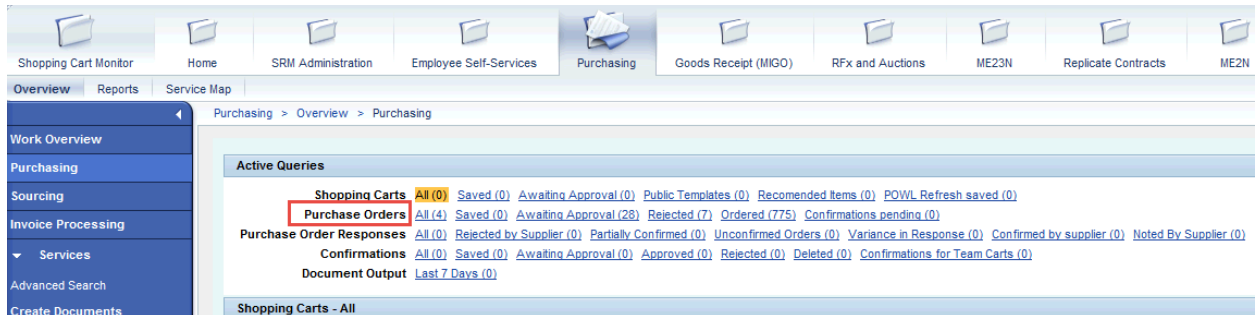
#### Step 1

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



#### Step 2

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



#### 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 dropdown you would use to search for POs in the “Saved” status.

1.

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 today's date, 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 \(0\)](#) [Recomended 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.



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.

In this example, the results retrieved two (2) POs with Error in Process, 4600368791 and 4600362297. The SRM screen is larger than one screen shot could contain, so we had to use two screen shots to display the data.

Purchase Orders - All [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:

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	TAPFN	675,000.00	USD
4600368791	Tapfn ICD-10 9/8/14	2	ICD-10	Error in Process	TAPFN	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](#) [Refresh](#) [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 FI/M team members and make the appropriate changes.

**Display Purchase Order**

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

**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**

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

Now, in this example, we will select 4600362297 to display the PO. Select 4600362297.

Purchasing > Overview > Purchasing Full Screen

Status: **Transfer Failed**

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:

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
<a href="#">4600368791</a>	Tapfn ICD-10 9/8/14	1	ICD-10	Error in Process	TAPFN	675,000.00	USD
<a href="#">4600368791</a>	Tapfn ICD-10 9/8/14	2	ICD-10	Error in Process	TAPFN	675,000.00	USD
<a href="#">4600362297</a>	Toner for Renee Gray 08132014	1	HP Cartridge CB436A	Error in Process	MANAGEDPRINT INC	480.00	USD
<a href="#">4600362297</a>	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:  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):

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 | Pr

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 system calculates the sum of the amounts in Account Assignment Details' values. Please see the screen shot below.

**Display Purchase Order**

**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

**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**

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 one (1) through four (4). Please 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	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

The bottom line is: 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](#)

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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 then the agency can 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.

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

