Miami-Dade County

How to Review Common PO Workflow Errors Job Aid

Version 1.0

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PURPOSE:

This document provides instructions on how to review and resolve common Purchase Order (PO) Workflow errors that you may encounter when submitting a PO. This document is for INFORMS users with Buyer security roles.

Note: Effective **June 1, 2024** Purchase Orders (POs) with dollar amounts less than $10,000 will be subject to PO Approval Workflow 1, along with POs from $10,000 to $24,999. All other dollar thresholds will remain the same.

Note: Effective **June 1, 2024** Purchase Orders (POs) with dollar amounts less than $10,000 will be included in the INFORMS PO Approval Workflow (**PO Approver 1**).

Outlined below are dollar thresholds for the INFORMS PO Approval Workflow:

- **PO Approver 1: $0.01 – $24,999.99**
- **PO Approver 2: $25,000 – $99,999.99**
- **PO Approver 3: $100,000 – $249,999.99**
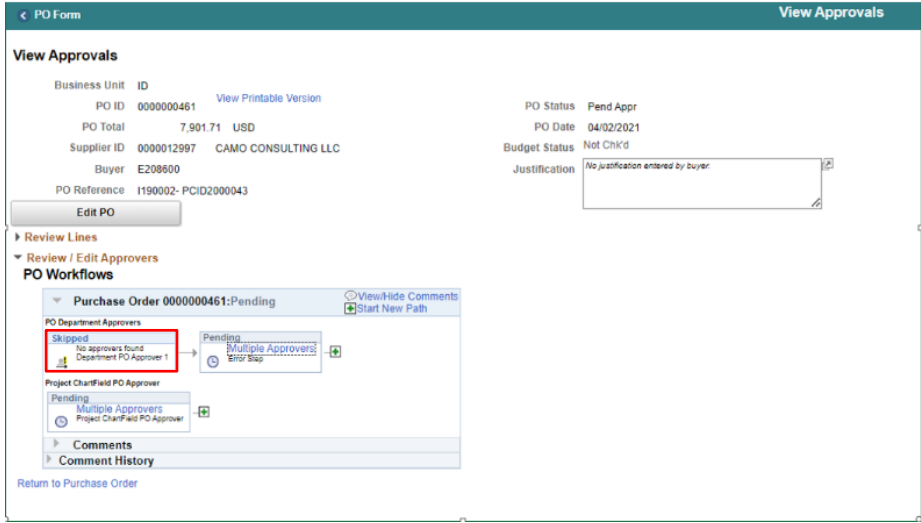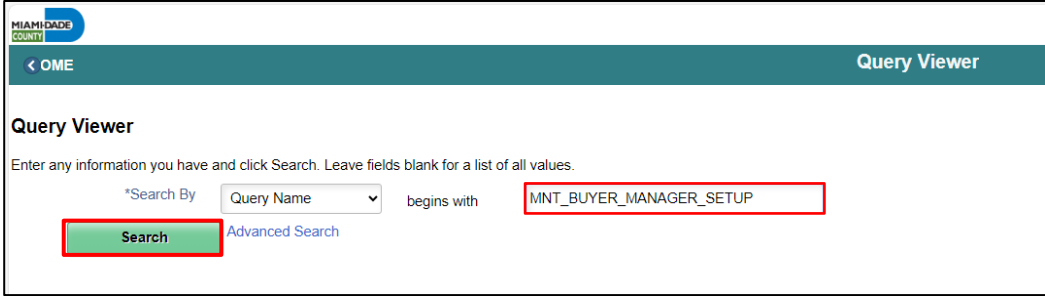- **PO Approver 4: $250,000 and above**

This adjustment will also impact PO lines containing specific Categories or Accounting Distributions (e.g. Fleet Category or Grant ChartField Approval Workflows). When applicable, these POs will be routed to the appropriate approvers regardless of the PO amount.
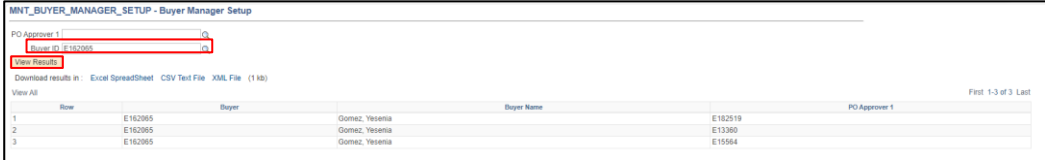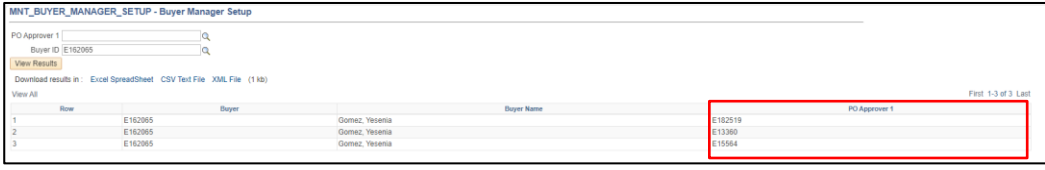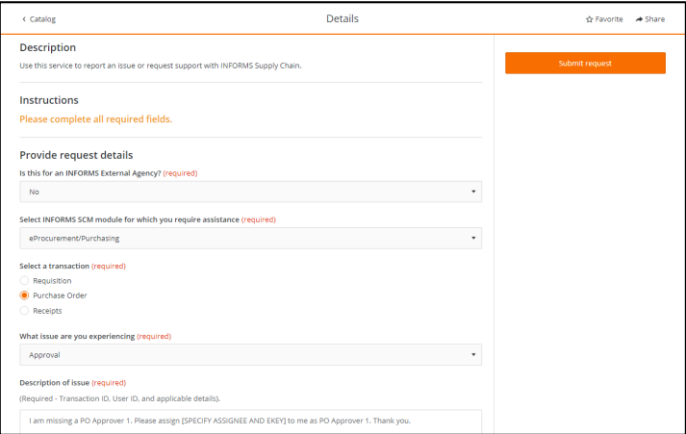
What this change means to all departments:

- **Buyers**: submitting POs less than $10,000 will now initiate the PO Approval Workflow.
- **PO Approver 1**: designated staff will need to approve POs less than $10,000.
- **Category and Accounting Approvers**: will now need to approve POs less than $10,000 where applicable.
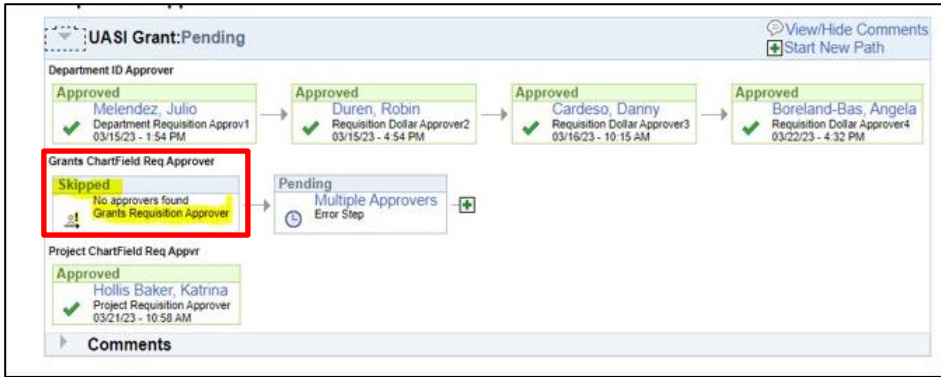
If you have any questions about this system update, please contact your Department Procurement Liaison. Support for any issues related to this process is available and ongoing. We encourage you to submit a MyIT service ticket to the Supply Chain Management (SCM) support team with details of the issue(s) requiring assistance

COMMON ERROR 1: PO MISSING PO APPROVER 1

Step	Action
1.	Buyers may receive an error during the submission of a Purchase Order (PO) if there is no manager assigned to them in the Buyer/Manager setup for the PO Approver 1 role. When this issue occurs, the following error message will be displayed in the Approval Workflow interface. This error signifies that the buyer does not have a designated manager in the necessary setup for PO Approver 1 under the Buyer/manager setup.
2.	Confirm that a manager has **not** been assigned to you by reviewing the following query in INFORMS: **MNT_BUYER_MANAGER_SETUP**. To view this query, complete the following steps: Login to INFORMS and navigate to: **NavBar > Navigator > Finance / Supply Chain (FSCM) > Reporting Tools > Query > Query Viewer**
3.	Insert **Query Name** and select **Search**.

Step	Action
4.	Select **Run to HTML.**
5.	Enter the **Buyer ID** and select **View Results**.
6.	If a PO Approver 1 has been assigned to you, then results will appear under the PO Approver 1 column. If results do not appear, then you do not have a PO Approver 1 assigned to you. This query is also beneficial for managers, as it enables them to verify the list of buyers they are assigned to oversee as PO Approver 1.
7.	If you have confirmed that you *do not* have a PO Approver 1 assigned to you, please submit a MyIT SCM Support / eProcurement / Purchasing ticket requesting that a PO Approver 1 be assigned to you. Please specify the person to be assigned and Ekey. **Note:** POs may need to be rerouted for approval once corrections are in place.

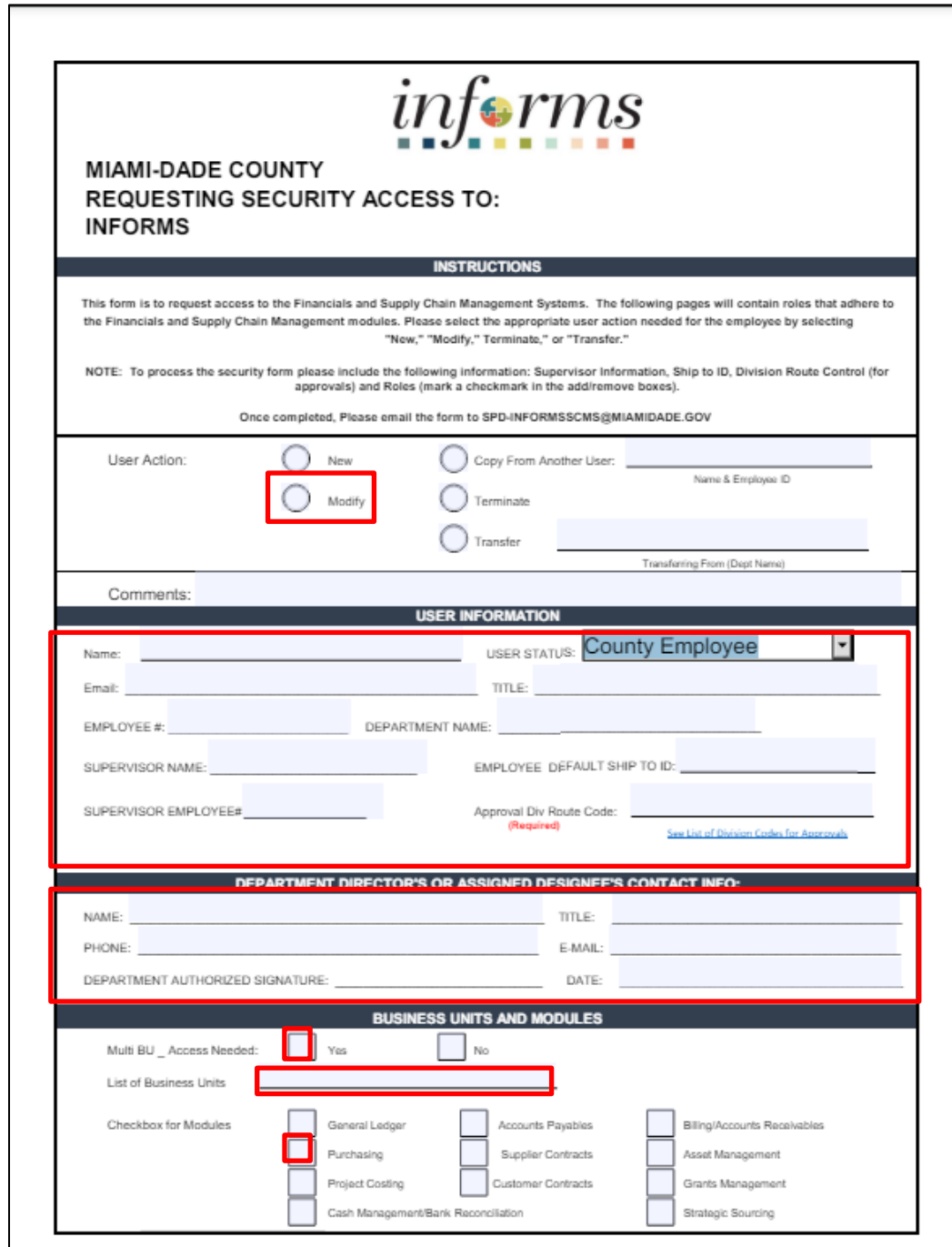# COMMON ERROR 2: PO MISSING GRANT / PROJECT MANAGER APPROVER

Step	Action
1.	Buyers will encounter an error when submitting a PO If the approval of a Grant or Project Manager is required *and* a manager has not been assigned to the Grant / Project. When this occurs, the error message highlighted below will appear on the Approval Workflow. This indicates that the Grant or Project doesn't have a manager assigned to it.
2.	When this occurs, please reach out to your Department Budget Office and request that a manager be assigned to the Grant or Project. **Note:** POs may need to be rerouted for approval once corrections are in place.

COMMON ERROR 3: PROJECT / GRANT MANAGER MISSING ACCESS TO BU

Step	Action
1.	Occasionally, a Project or Grant Manager will be listed on a PO Approval Workflow but unable to view or approve the PO. This can occur when a department (e.g. ITD) issues a PO on behalf of another department utilizing that other department's ChartField values. If the Project or Grant Manager from the other department doesn't have access to the BU that submitted the PO, they will not be able to approve.

2.	When this occurs, the manager should complete the first page of the Request Security Access – Rollout 1 FSCM Form.
	Under **User Action**: Select **Modify** Complete **User Information** and **Department Director Information** sections **Under Business Units and Modules**:

Step	Action
	Multi BU_Access Needed: Select **Yes** **List of Busines Units**: Enter the Business Unit **Checkbox for Modules**: Select **Purchasing**
3.	Once form is completed, email the form to: SPD-INFORMSSCMS@MIAMIDADE.GOV . **Note:** POs may need to be rerouted for approval once corrections are in place.