



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**

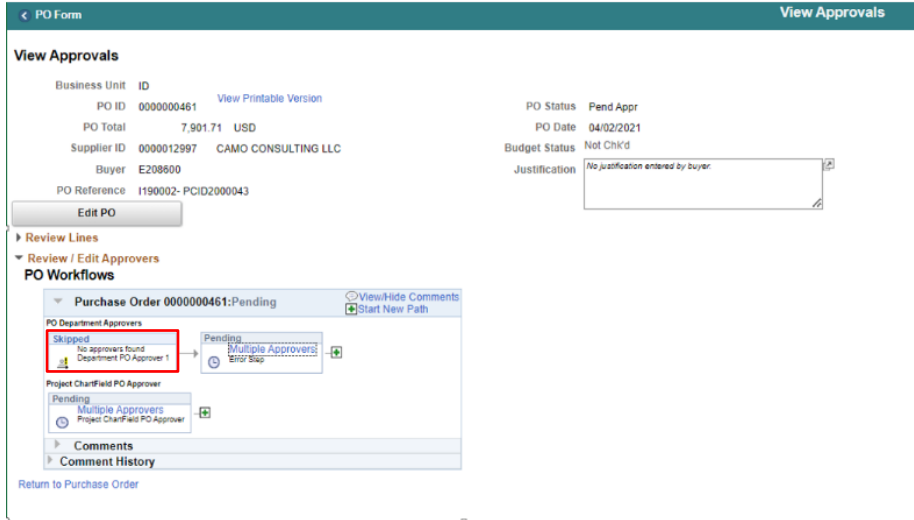
This adjustment will also impact PO lines containing specific Categories or Accounting Distributions (e.g. Fleet Category or Grant ChartField Approval Workflows). When applicable, these POs will be routed to the appropriate approvers regardless of the PO amount.

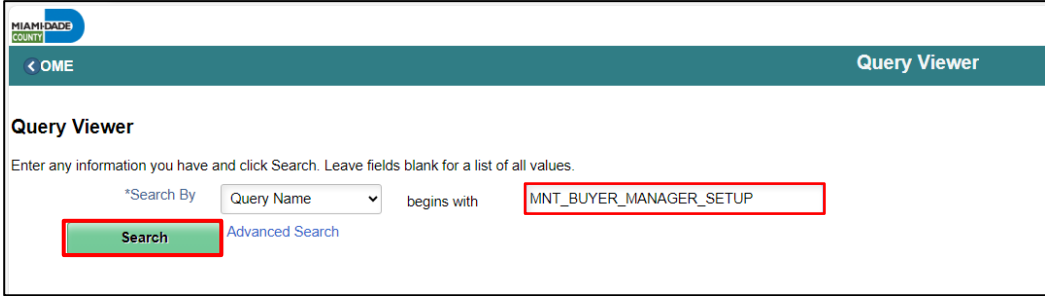
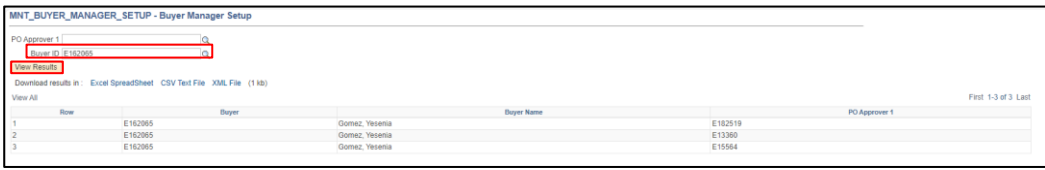
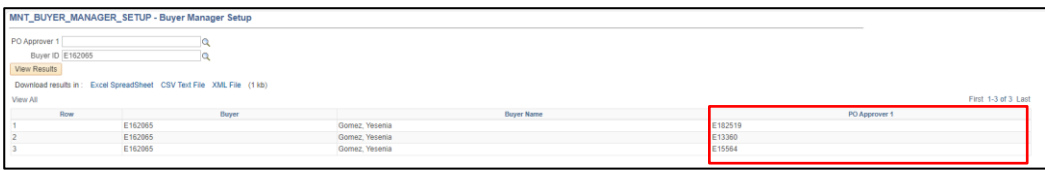
What this change means to all departments:

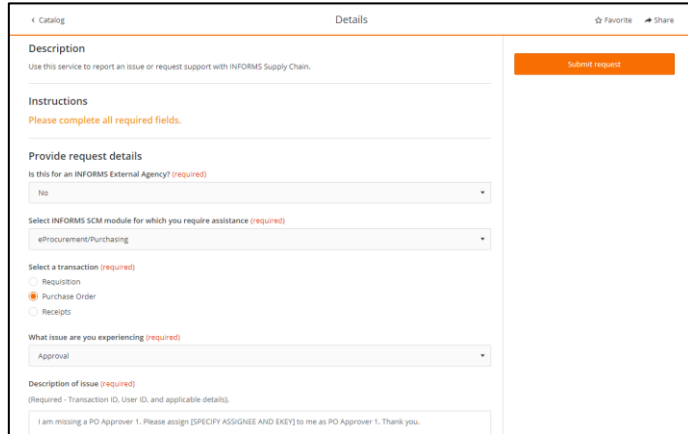
- **Buyers:** submitting POs less than \$10,000 will now initiate the PO Approval Workflow.
- **PO Approver 1:** designated staff will need to approve POs less than \$10,000.
- **Category and Accounting Approvers:** will now need to approve POs less than \$10,000 where applicable.

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

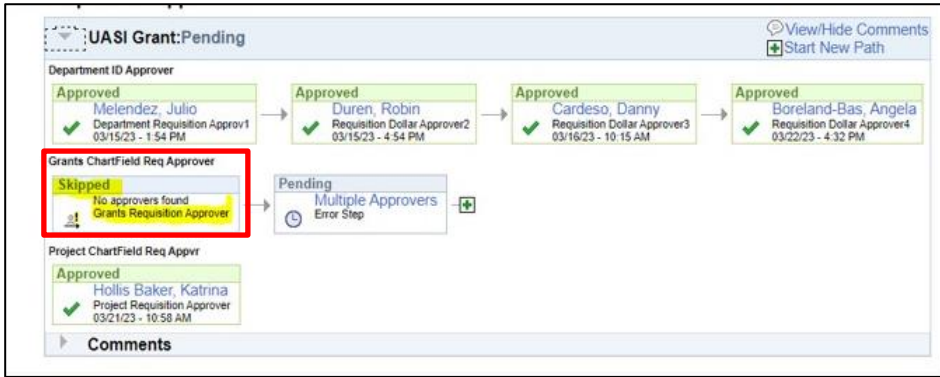
COMMON ERROR 1: PO MISSING PO APPROVER 1

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

Step	Action
3.	Insert Query Name and select Search. 
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. 

Step	Action
7.	If you have confirmed that you <i>do not</i> 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

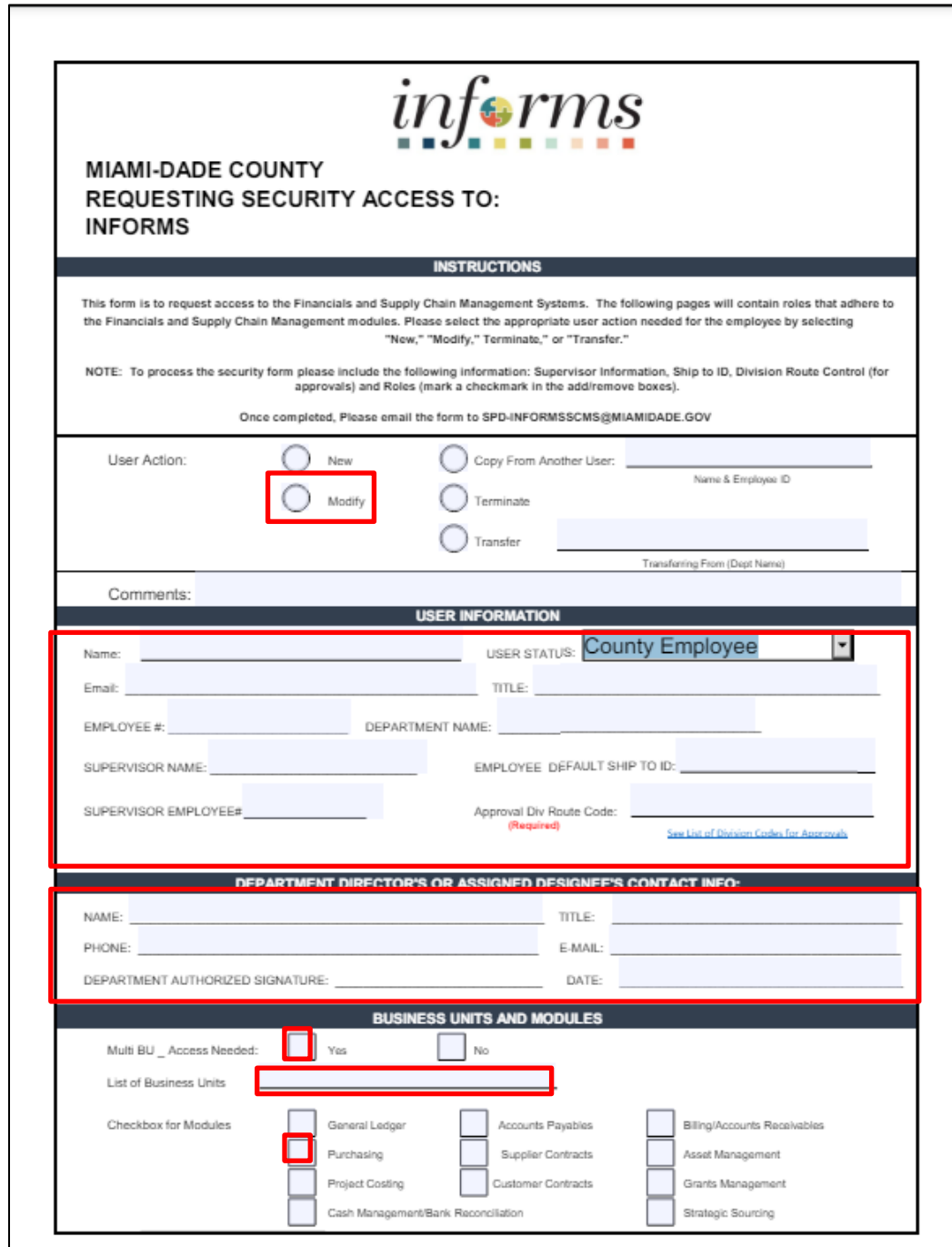
Step	Action
1.	Buyers will encounter an error when submitting a PO If the approval of a Grant or Project Manager is required <i>and</i> a manager has not been assigned to the Grant / Project. When this occurs, the error message highlighted below will appear on the Approval Workflow. This indicates that 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](#).



informatics

**MIAMI-DADE COUNTY
REQUESTING SECURITY ACCESS TO:
INFORMS**

INSTRUCTIONS

This form is to request access to the Financials and Supply Chain Management Systems. The following pages will contain roles that adhere to the Financials and Supply Chain Management modules. Please select the appropriate user action needed for the employee by selecting "New," "Modify," "Terminate," or "Transfer."

NOTE: To process the security form please include the following information: Supervisor Information, Ship to ID, Division Route Control (for approvals) and Roles (mark a checkmark in the add/remove boxes).

Once completed, Please email the form to SPD-INFORMSSCMS@MIAMIDADE.GOV

User Action: ☐ New ☒ **Modify** ☐ Copy From Another User: _____
Name & Employee ID _____
☐ Terminate _____
☐ Transfer _____
Transferring From (Dept Name) _____

Comments: _____

USER INFORMATION

Name: _____ USER STATUS: **County Employee**
Email: _____ TITLE: _____
EMPLOYEE #: _____ DEPARTMENT NAME: _____
SUPERVISOR NAME: _____ EMPLOYEE DEFAULT SHIP TO ID: _____
SUPERVISOR EMPLOYEE# _____ Approval Div Route Code: _____
(Required) [See List of Division Codes for Approvals](#)

DEPARTMENT DIRECTOR'S OR ASSIGNED DESIGNEE'S CONTACT INFO:

NAME: _____ TITLE: _____
PHONE: _____ E-MAIL: _____
DEPARTMENT AUTHORIZED SIGNATURE: _____ DATE: _____

BUSINESS UNITS AND MODULES

Multi BU - Access Needed: ☒ Yes ☐ No

List of Business Units: _____

Checkbox for Modules

☐ General Ledger	☐ Accounts Payables	☐ Billing/Accounts Receivables
☒ Purchasing	☐ Supplier Contracts	☐ Asset Management
☐ Project Costing	☐ Customer Contracts	☐ Grants Management
☐ Cash Management/Bank Reconciliation	☐ Strategic Sourcing	

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 Business 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.