myfin
my work.
my financials.

Purchasing/eProcurement

Troubleshooting Guide

Presented By:

SALT LAKE COUNTY
CONTRACTS AND PROCUREMENT

CAPITAL ASSETS

- There are ranges of account numbers, 673005-683020, that the Asset group reviews that are not capital assets, such as maintenance and non-capital items over $5,000.

- All payments from capital accounts 673005-683020, must be made from a Purchase Order. If a Purchase Order is not used, the PeopleSoft Asset Management system will not have a record of the payment.

CATEGORY CODES

- The GENERIC Category Code pre-populates on your requisition so that you do not need to select a category code; be sure to use the correct account in the Account field.

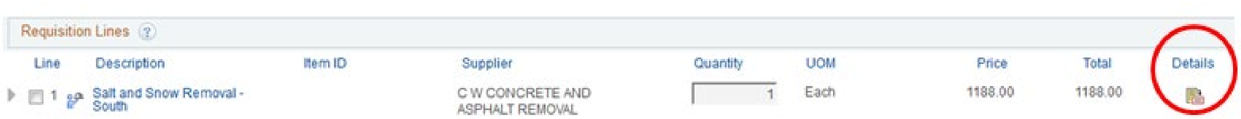
CONTRACTS

- Justin Kelley, in Mayor's Finance, is the SME (subject matter expert) for the Customer Contracts module.

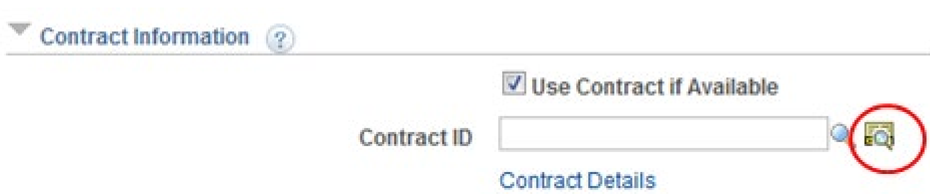
- There is a glitch in the system that doesn't allow attachments in the Customer Contracts module; hopefully we'll have a fix in one of the patches that Oracle sends out.

- If you are looking up a revenue contract in MyFin and cannot find it, contact Contracts & Procurement, extension 80300; not all revenue contracts were converted over to MyFin.

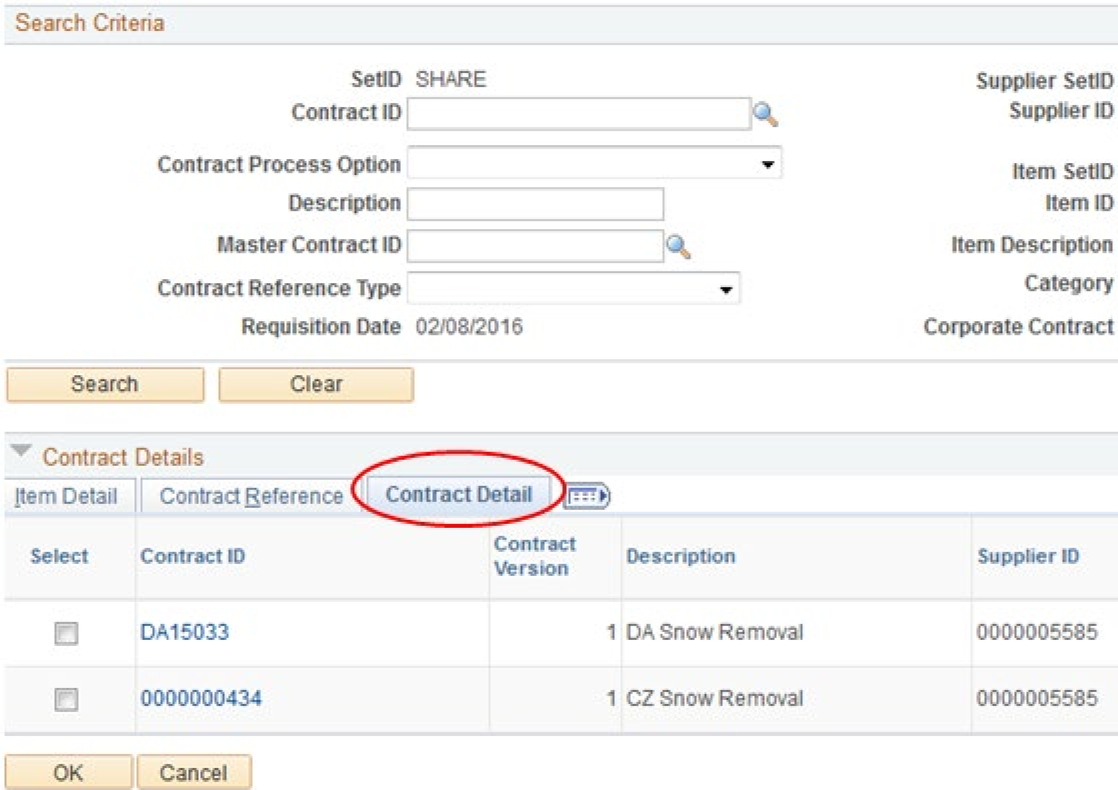
- Looking for specific supplier contracts? There are several ways to find supplier contracts:
  1. As you enter your requisition on the "Edit Requisition – Review and Submit" screen click on the "Details" icon:



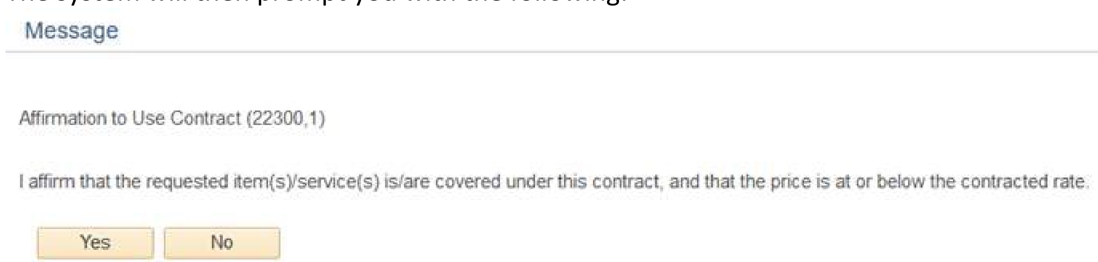
  - Then, in the "Contract Information" section, click on the contract search icon (second magnifying glass):



- Next click “Search”, you don’t need to enter any information, it will bring up all contracts with your selected Supplier. If you click on the “Contract Detail” tab you’ll be able to see which agency “owns” the contract or if it is countywide (designated by either CW or CZ) and you can select either your own agency’s contract, or a countywide contract:

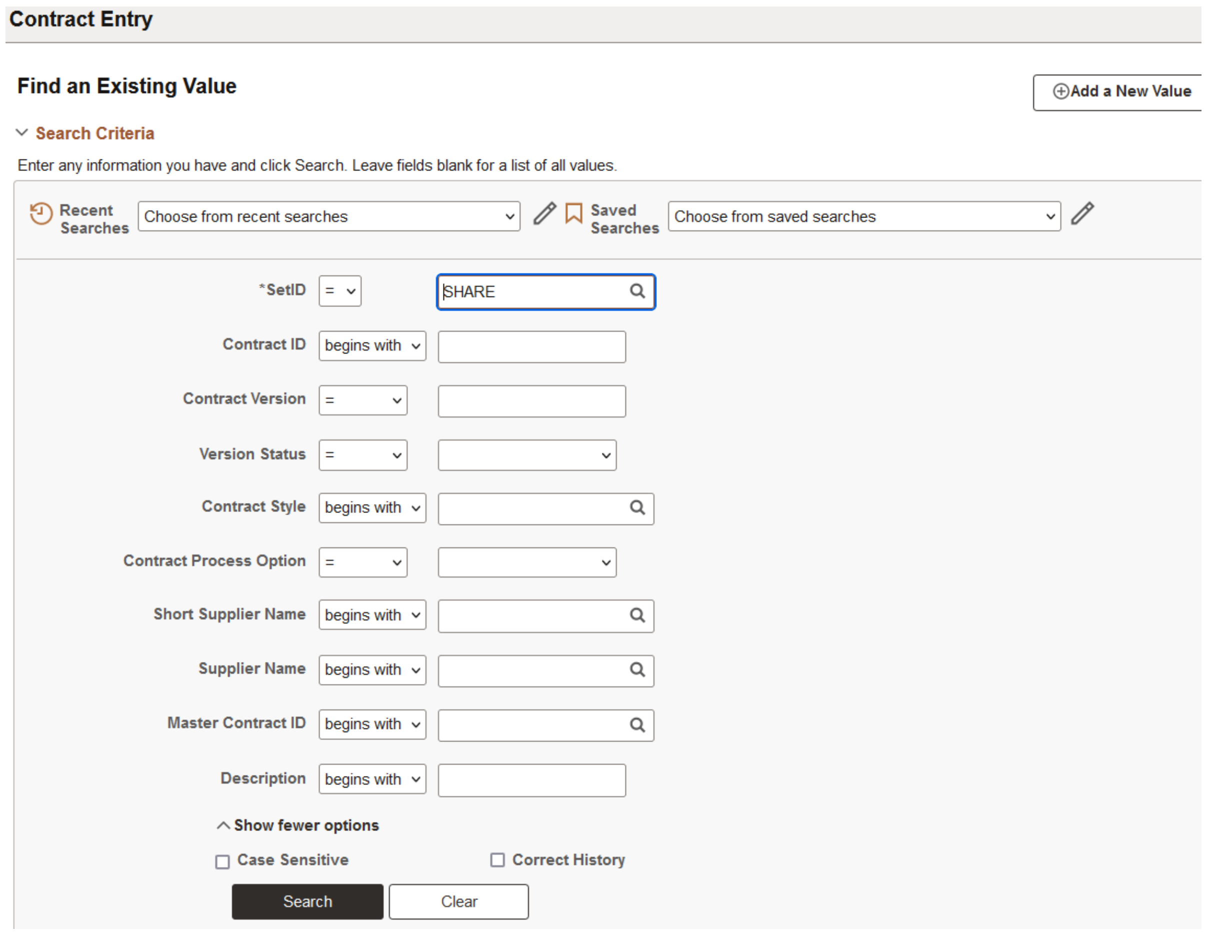


- The system will then prompt you with the following:



This is an opportunity and a reminder to verify that the contract you want to use covers the items or services you’re requesting, and to double check the pricing to make sure it is at or below the contracted rate.

2. **OR** Search supplier contracts by clicking on the “Supplier Contract Inquiry” tile from the Purchasing & Accts Payable homepage, then search for your contract in the “Find an Existing Value” page:



3. **OR** You can also run the query “SLC_ALL_CURRENT_SUP_CNTRCT” for a list of only those current supplier contracts, or query “SLC_SUPPLIER_CONTRACTS_T” for a list of all supplier contracts, even expired.

- Encumbering contracts: In MyFin, a contract does <u>not</u> encumber, a PO does. Once a contract is entered and you receive notification that it is complete, enter in a requisition and PO for the amount you would like encumbered for that contract. Then use that PO number on any invoices that come in for that contract work. NOTE: Your PO must be “Amount Only” to be able to make multiple payments if your PO is set up with a quantity of 1.

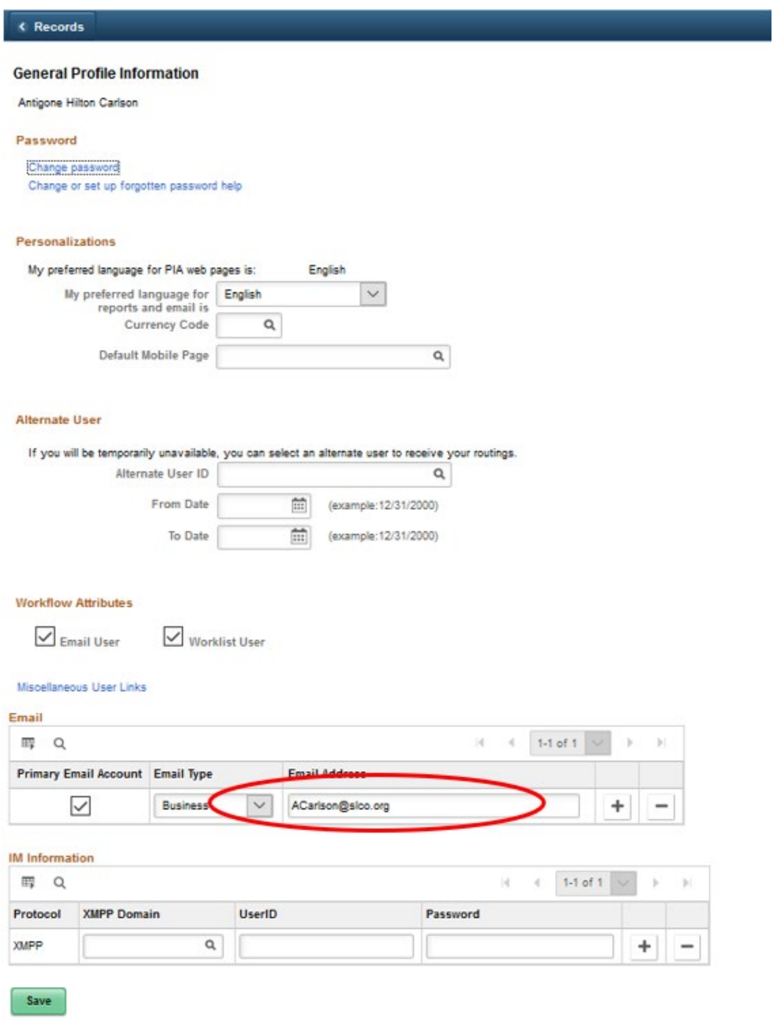
DEFAULTS

- If you need your default accounting information, “ship to”, “account”, “dept” etc. changed contact Rachael in Contracts & Procurement, extension 80310, and she can update your defaults.

EMAIL NOTIFICATIONS

- If you do not want to receive email notifications from MyFin you will need to set up an Outlook rule to have them routed to your junk mail folder. There is not a way to turn it off for one user in the system, which would mean those that want to receive them couldn’t.

- If emails are going to the wrong person, your email address needs to be updated. Go to the Compass Icon>Navigator>My System Profile and edit your email address and click “Save”:

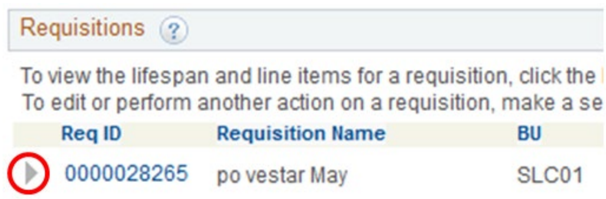


LOCATION IDs

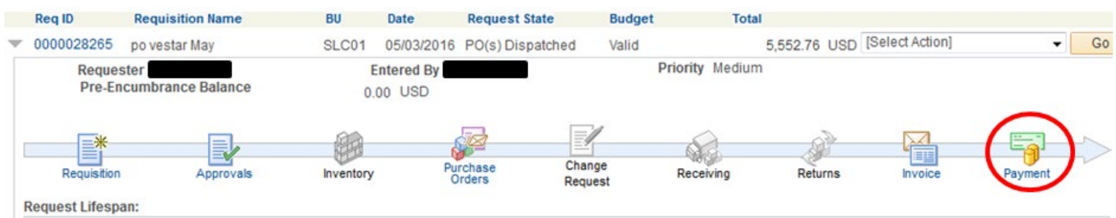
- Facilities is over the locations and their addresses in PeopleSoft – new buildings/locations are coordinated between both Facilities and Contracts & Procurement.

PAYMENTS

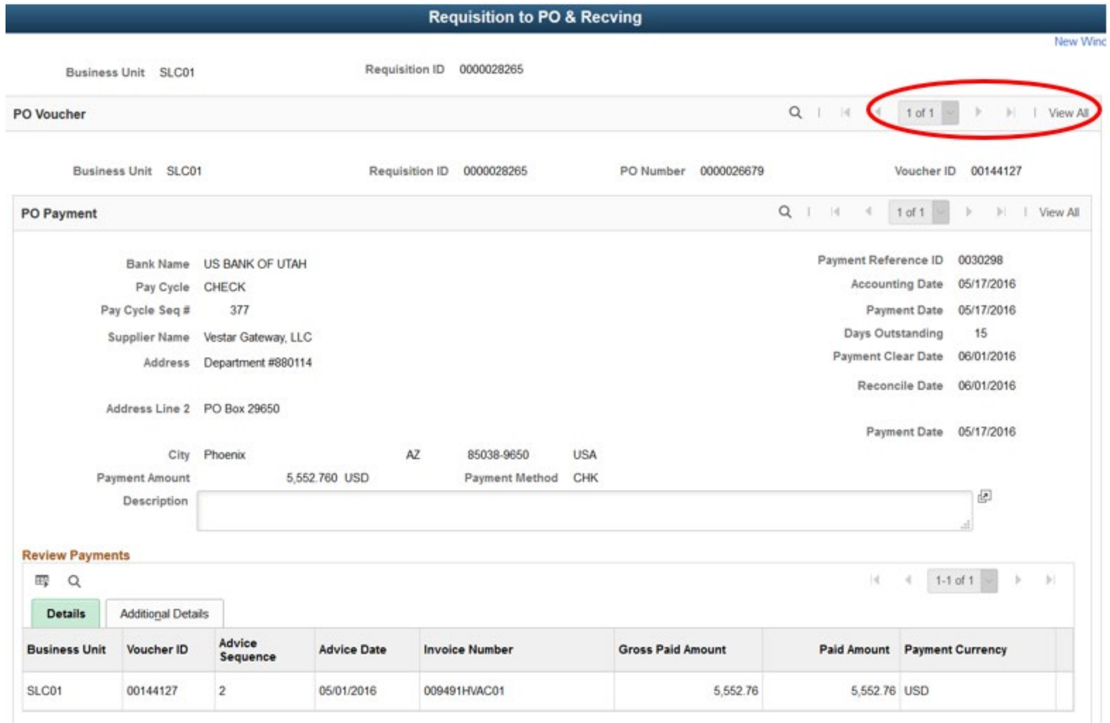
- If you need to check to see if payment has been made you can:
    - Check the lifeline on your "Manage Requisitions" screen by clicking the gray triangle to the left of your req. number:



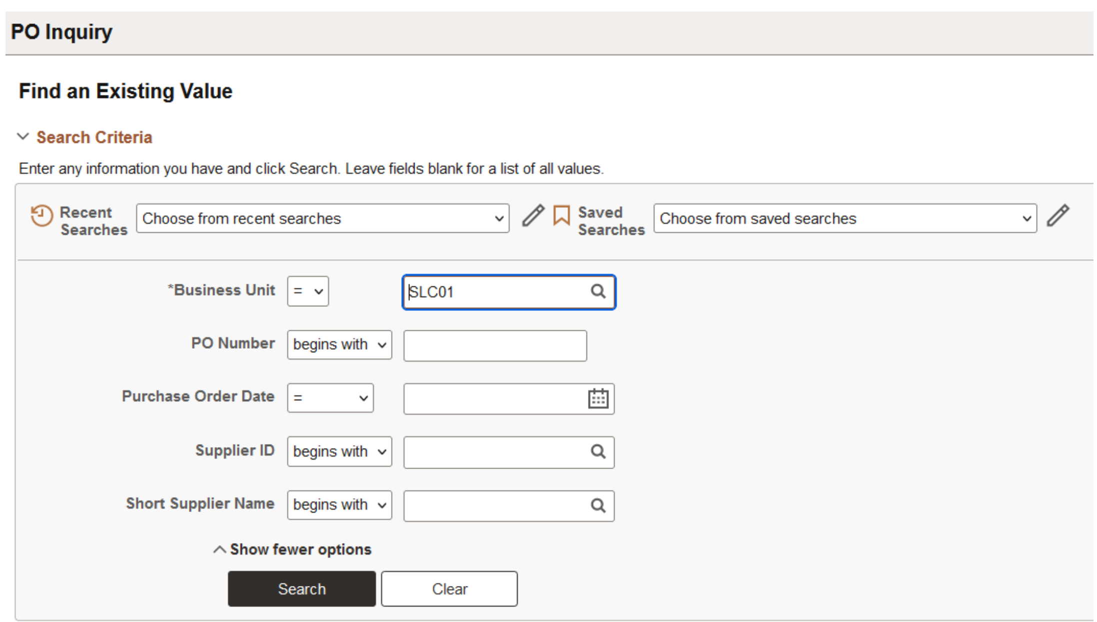
  - If the "Payment" icon on the lifeline is in color, you can click on it to see what payments have been made (if it is grayed out, no there haven't been any payments made yet):



  - It will then display your payment info. (be sure to note that there may be multiple vouchers listed, check to see if there are multiple pages to view, if there are, you can click "View All" to see them all on one page, although the page will give a summary):



- **OR** You can click the "AP/PO Inquiry" tile from the Purchasing & Accts Payable homepage, then enter your PO number in the PO Number field:



- If you submit an invoice to AP for payment, but they say they cannot find your PO you should go back to your "Manage Purchase Orders" page and make sure that your PO is dispatched; if it isn't dispatched AP cannot access it.
- Multiple invoices: According to Accounts Payable, only one invoice can be on a voucher, but multiple vouchers can be on a single payment.

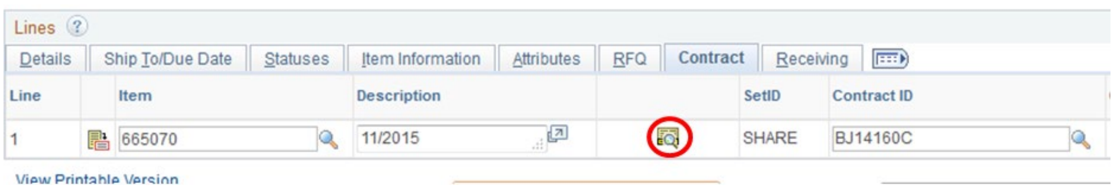
PEOPLESOFT TIMEKEEPING VS FINANCIALS

- Keep in mind that the timekeeping and financial systems are two different sites. Access MyFin (PeopleSoft Financials) at https://psfin.slcounty.org/.

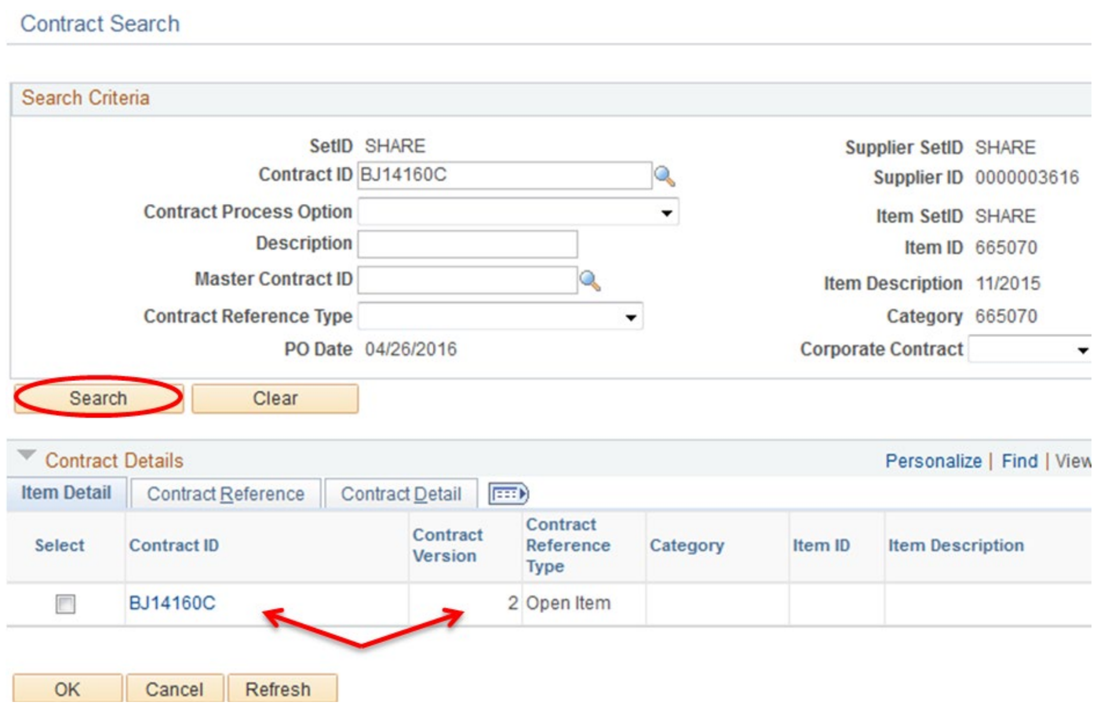
PURCHASE ORDER – BUDGET ERROR

- If you get a budget error on your PO, you should verify that the PO is linked to the correct *version* of the contract. Getting the correct contract version will clear up this budget issue. From the "Maintain Purchase Order" screen, click on the "Contract" tab:

  - Then click on the "Contract Search" icon:



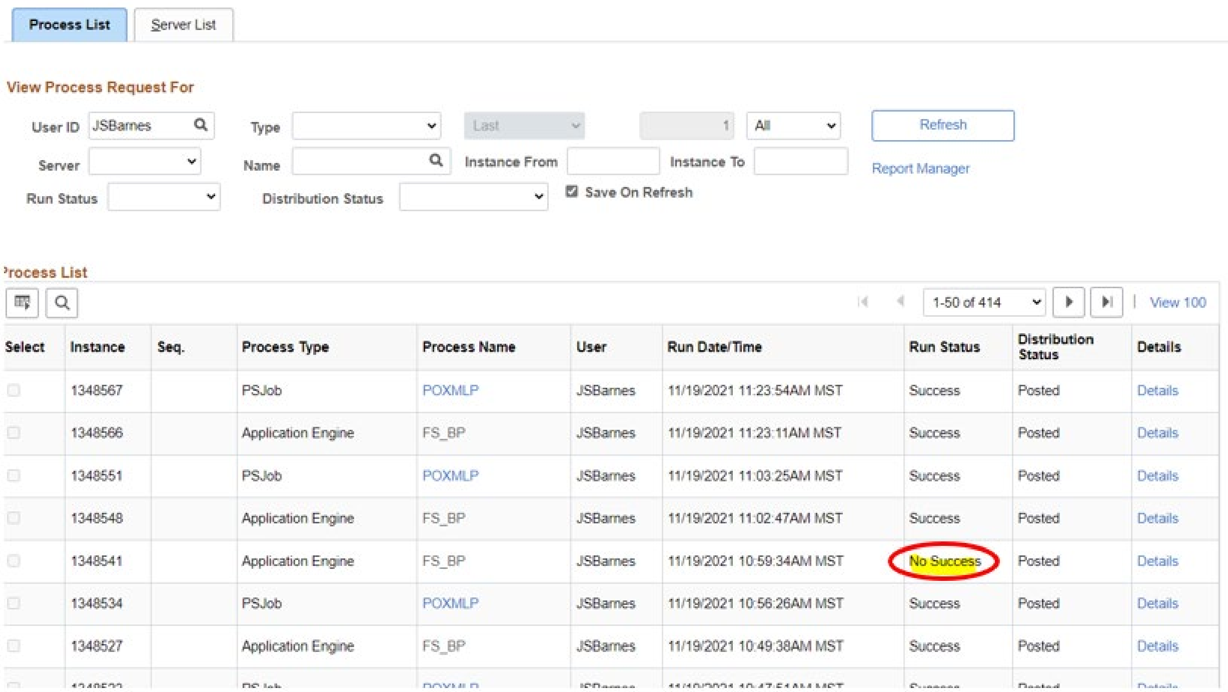
  - On the next screen, simply click "Search", and it will automatically bring up the current version of the contract:



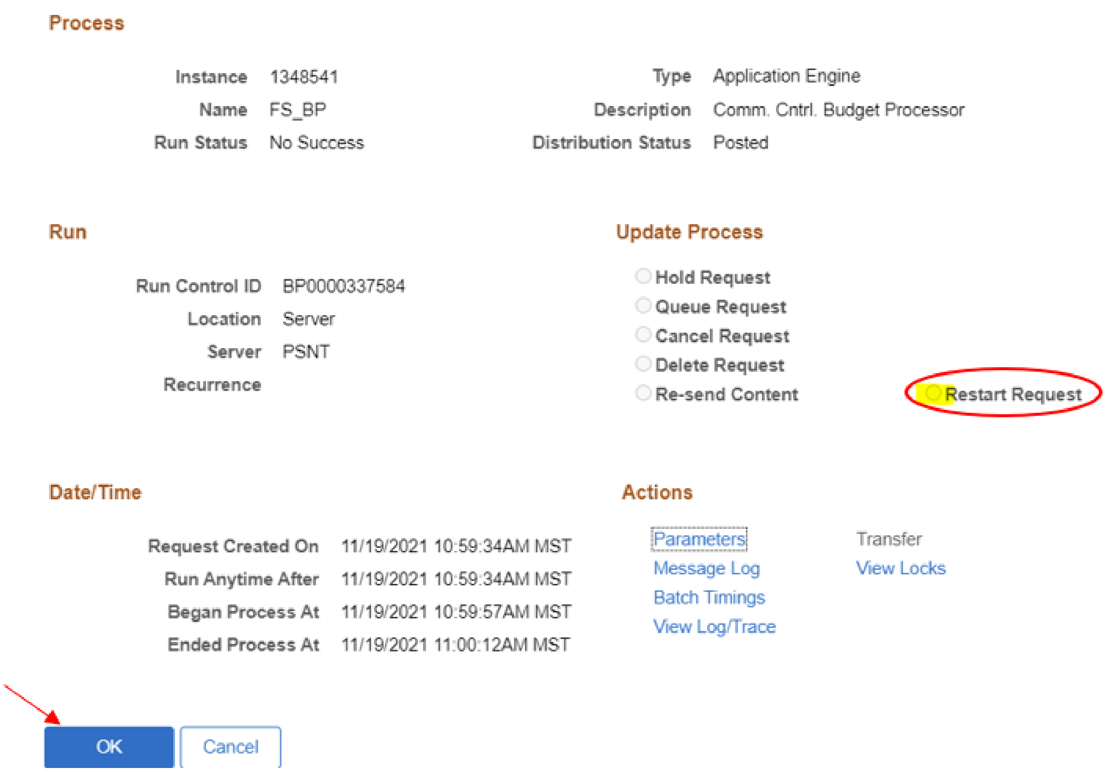
- Then check the box of the contract, click "OK" and do the budget check again; the PO should pass.

- If you get the Budget Processor error, "The purchase order cannot be saved. Because Budget Processor is running against this document in the background", when trying to budget check your PO:

  - From the homepage go to the process monitor (it's one of the tiles on the Purchasing & Accounts Payables homepage), and then look for any items that have no success in the run status:



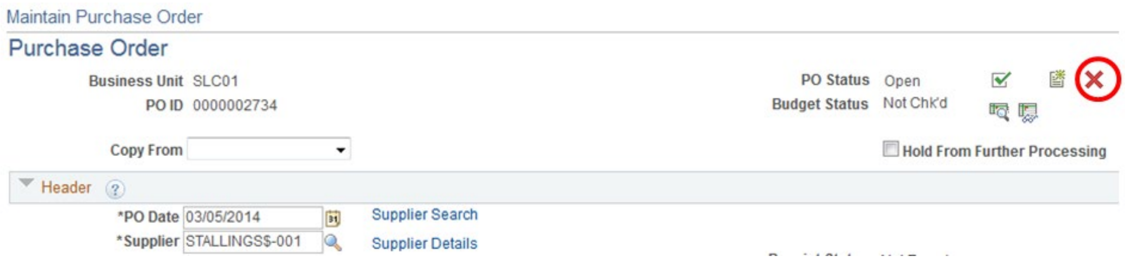
- Then click on that Details hyperlink and click "Restart Request":



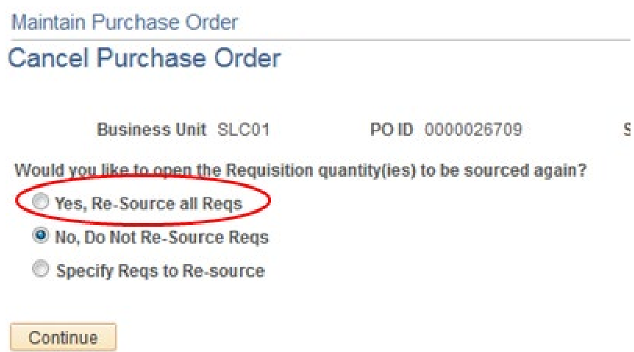
- And then OK. See if it goes to complete. If it doesn't, go back in and delete the request and then when you click the budget check it will start a new process for it.

PURCHASE ORDER - CANCEL

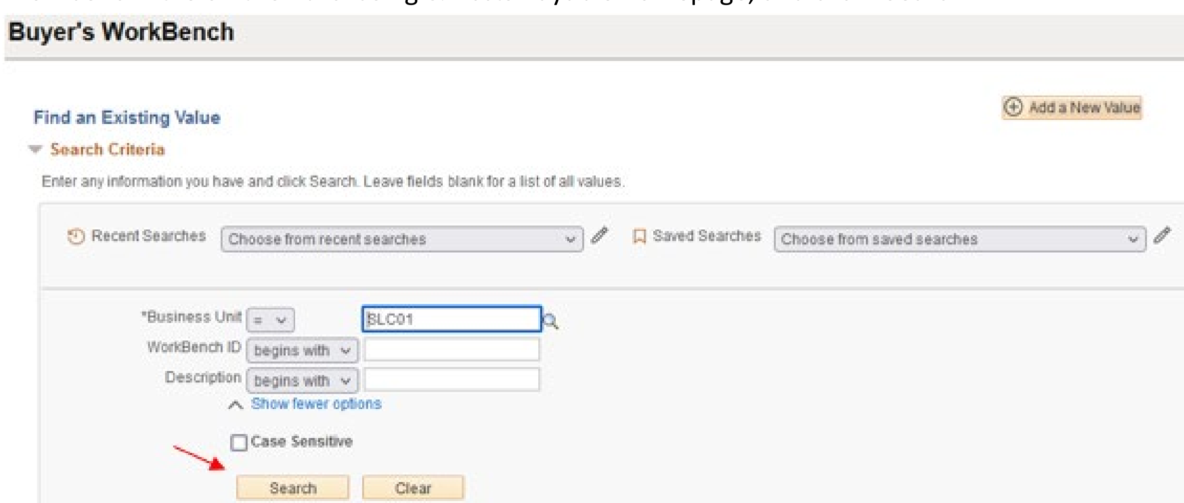
- To cancel your PO: From the “Maintain Purchase Order” screen, click the red ‘X’ in the upper right-hand corner:



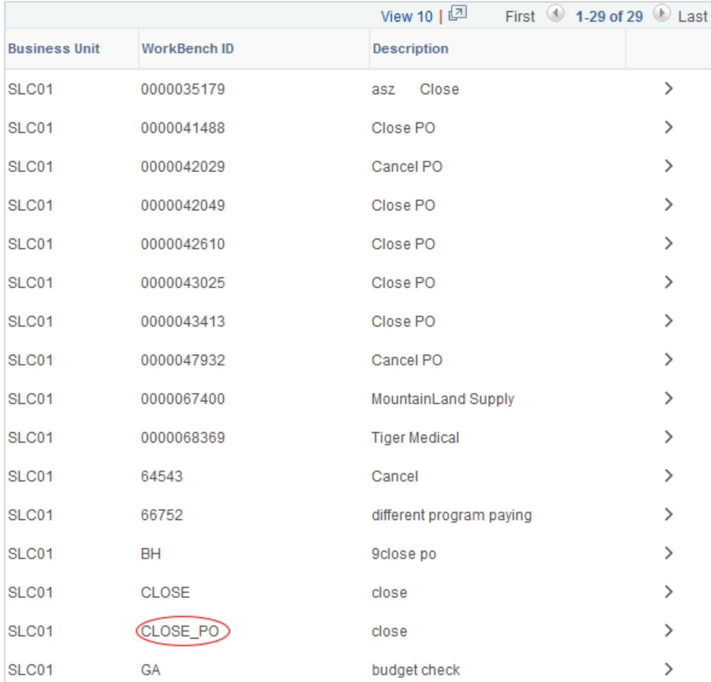
  - A warning will come up letting you know that you can’t make any changes after canceling and asking if you want to continue. Select “Yes”. On the next screen, be sure to select “Yes, Re-Source all Reqs” (it defaults to “No”) then click “Continue”:



- To cancel a PO that has already been dispatched: Use the Buyer’s Workbench by clicking the “Buyer’s Workbench” tile on the Purchasing & Accts Payable homepage, and click “Search”:



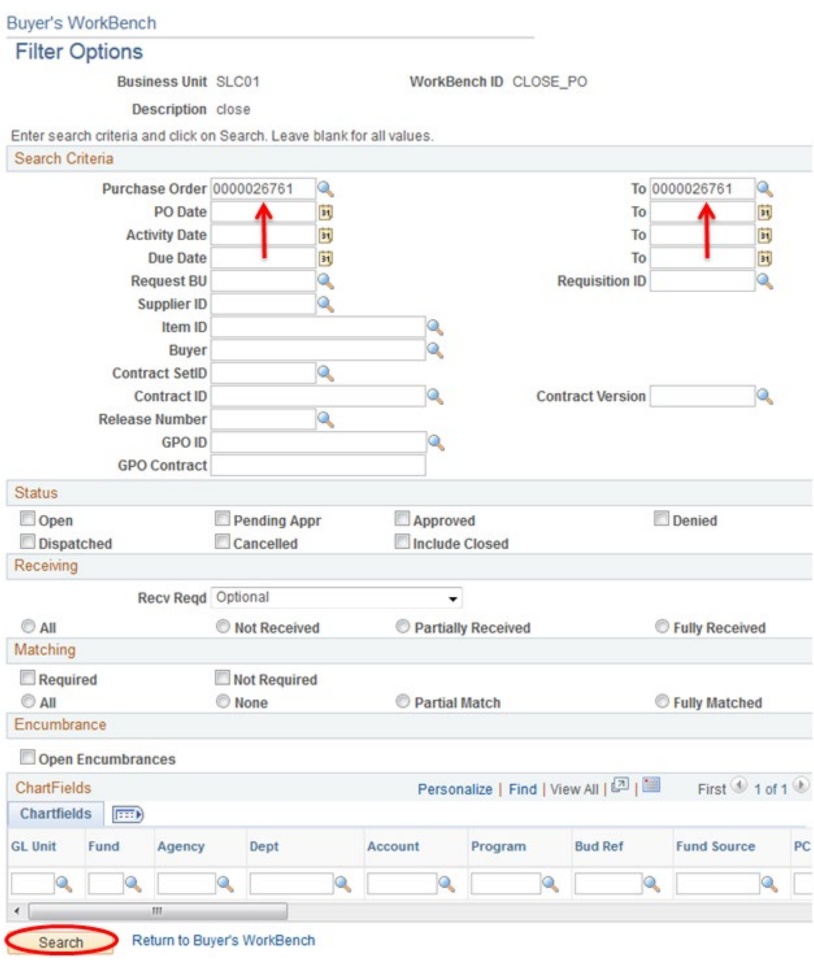
  - Then click “Close_PO” (all of the options do the same thing, so you can select any of them):



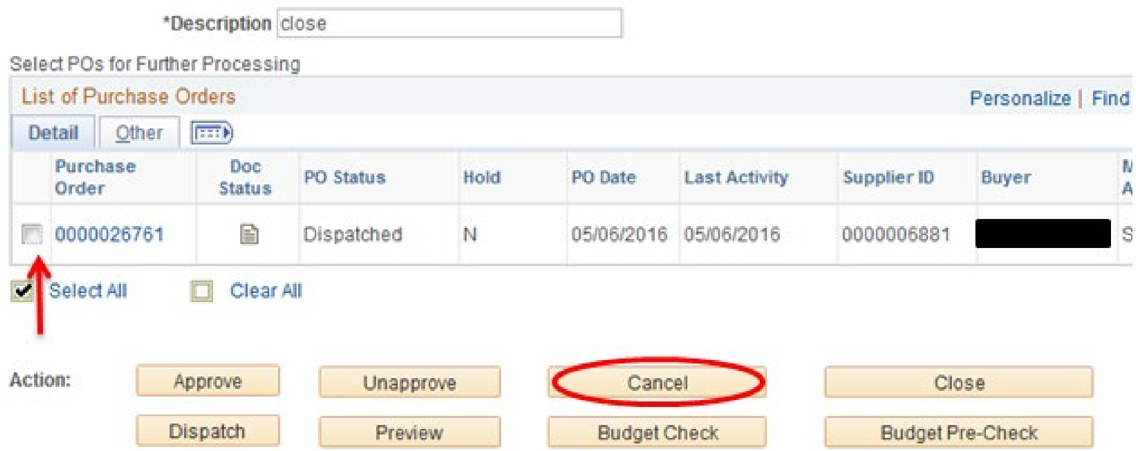
View 10 | First 1-29 of 29 Last

Business Unit	WorkBench ID	Description
SLC01	0000035179	asz Close
SLC01	0000041488	Close PO
SLC01	0000042029	Cancel PO
SLC01	0000042049	Close PO
SLC01	0000042610	Close PO
SLC01	0000043025	Close PO
SLC01	0000043413	Close PO
SLC01	0000047932	Cancel PO
SLC01	0000067400	MountainLand Supply
SLC01	0000068369	Tiger Medical
SLC01	64543	Cancel
SLC01	66752	different program paying
SLC01	BH	9close po
SLC01	CLOSE	close
SLC01	CLOSE_PO	close
SLC01	GA	budget check

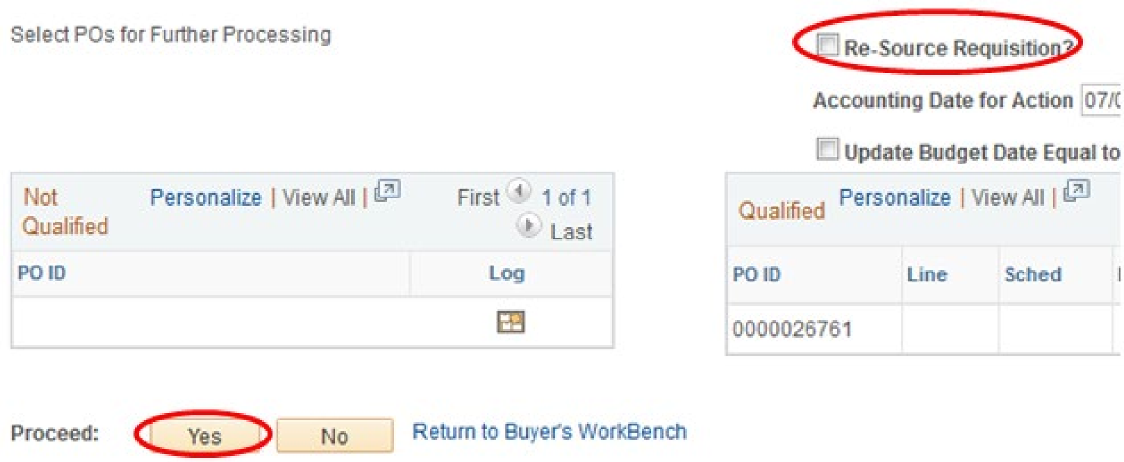
- Enter your PO number in the "Purchase Order" and "To" fields then click "Search":



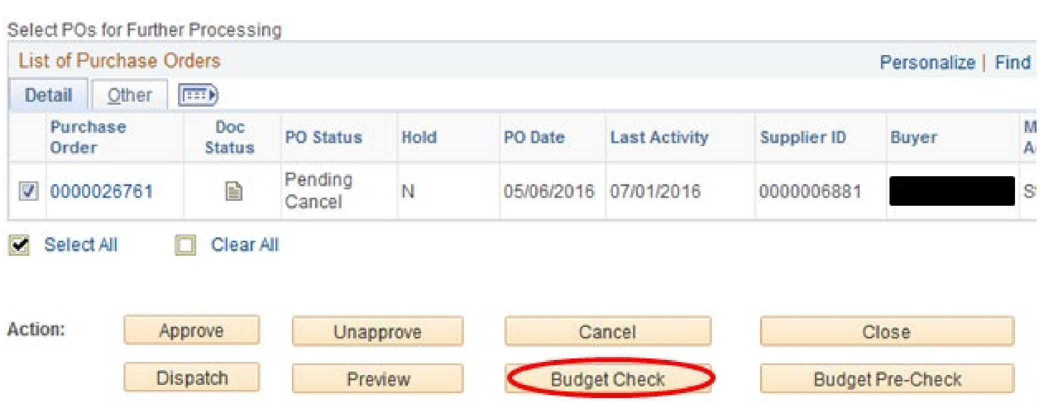
- Next, click the box to select the PO and then click "Cancel":



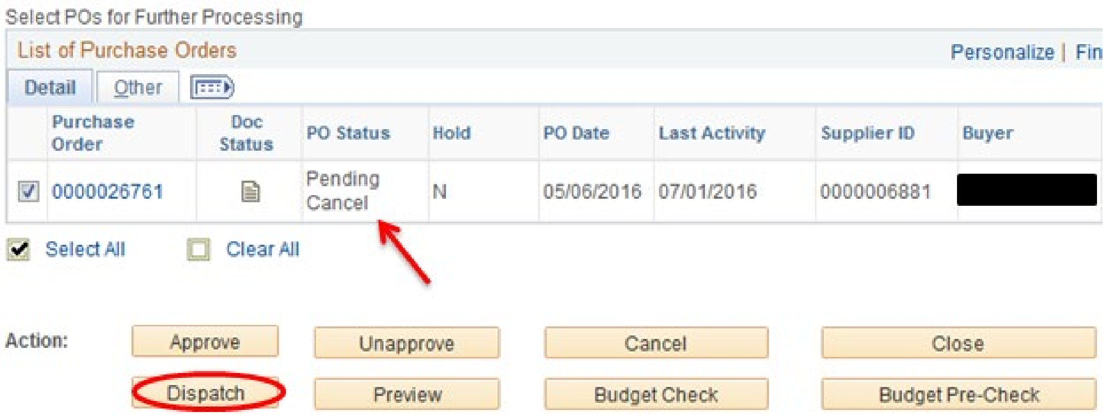
- On the next screen, mark the box to re-source the requisition and then click "Yes" to proceed:



- It will bring you back to the Buyer's Workbench and you need to click on "Budget Check" to free up the funds:



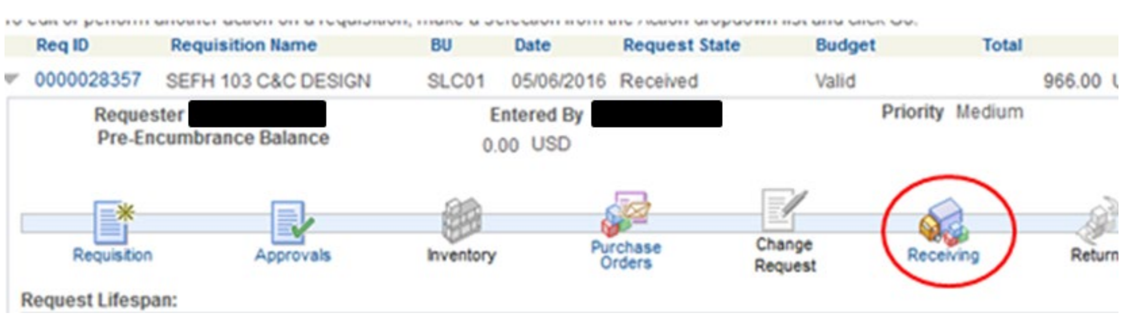
- Then click on "Yes" to proceed again. You will notice that when you come back to the Buyer's Workbench, the PO Status shows "Pending Cancel" the reason is that since the PO was previously dispatched the system requires the PO to be dispatched again to fully cancel. So you'll need to then select "Dispatch":



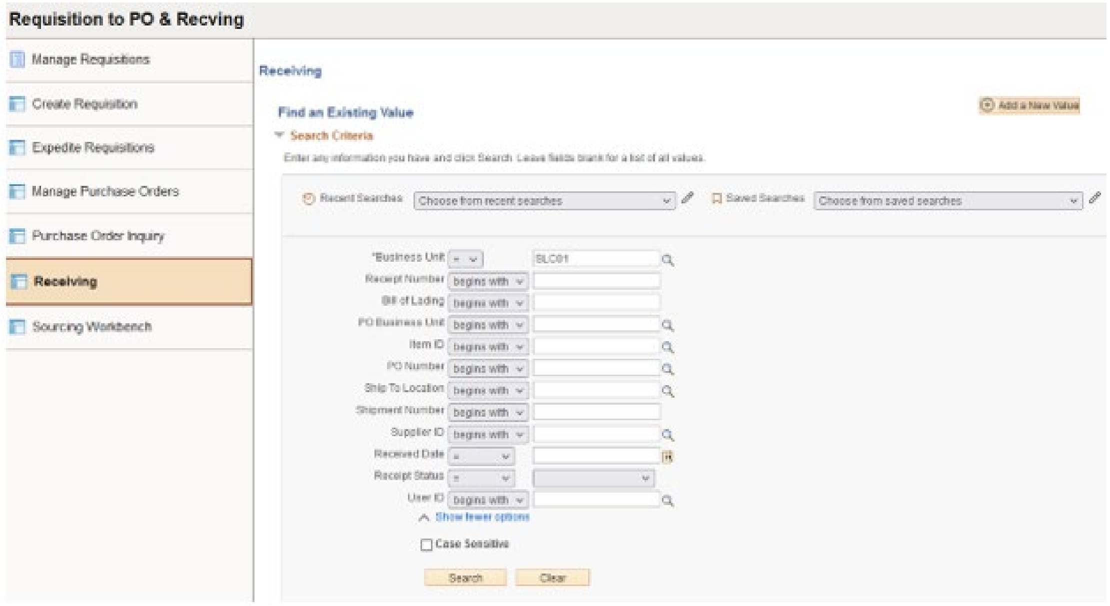
- Next you'll click on "Yes" to proceed, one last time.

PURCHASE ORDER – CANNOT CANCEL

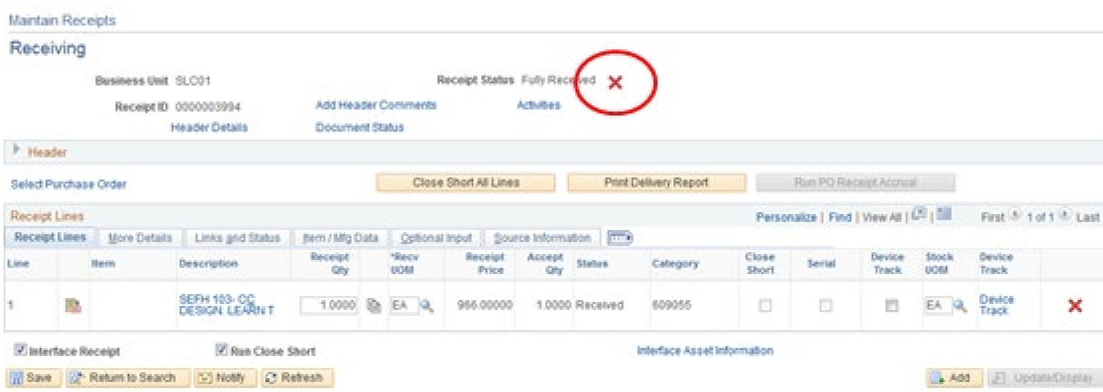
- If you need to cancel your PO, but you have already received the item(s), you will need to go and cancel the receipt before you can cancel the PO. To find out what your receipt number is, go to your "Manage Requisitions" screen, on the "lifeline" click on the "Receiving" icon and it will give you the Receipt ID:



  - Once you know your receipt number click on the "Receiving" option on the left nav./menu, click "Find an Existing Value", and search for your receipt (you can also search by PO number):



- Then you'll click the red "X" in the upper right-hand corner of the receipt:



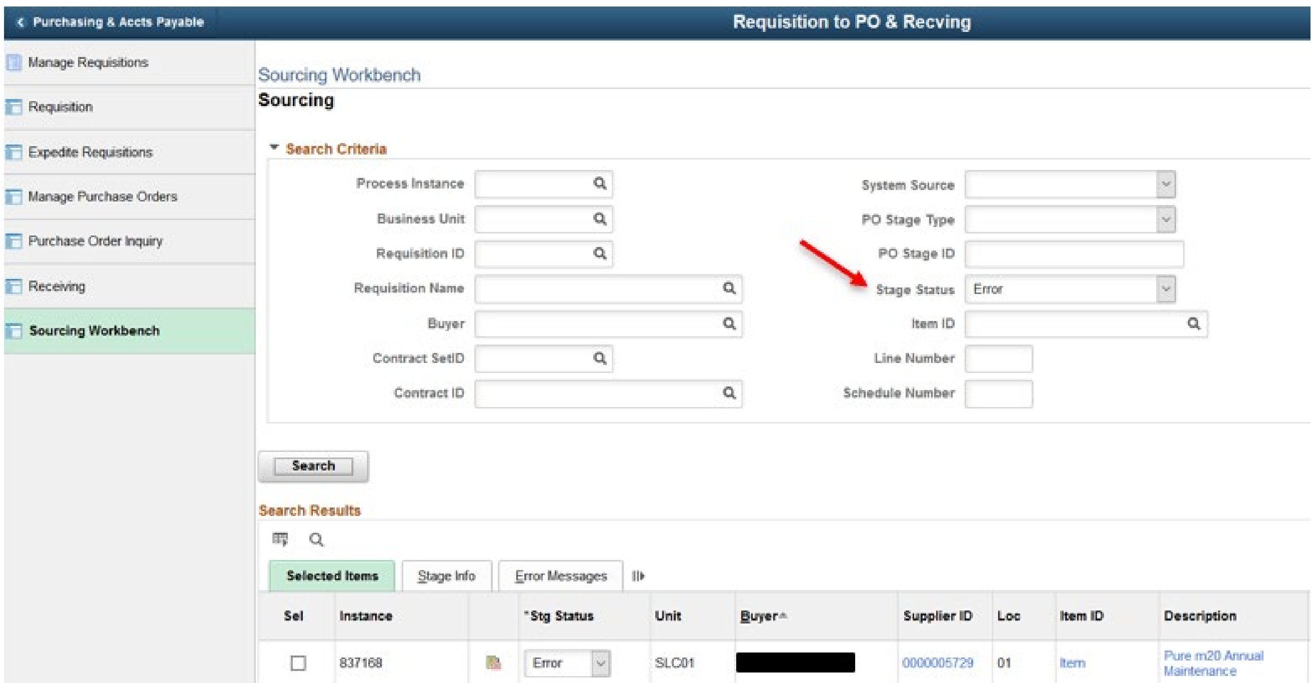
- Now you will be able to cancel your PO.

- If you need to cancel a PO that hasn't been received yet but says it is tied to an active voucher, you will need to contact Accounts Payable and ask them to cancel the voucher against your PO so that you can move forward with canceling your PO.

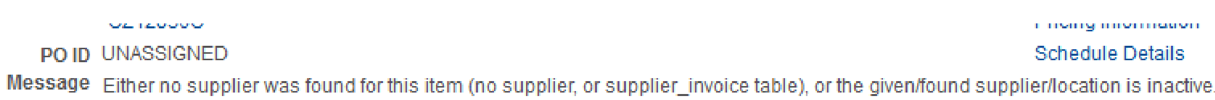
PURCHASE ORDER – CANNOT CREATE

- If you have a requisition that says that it is sourced to a PO, but there isn't a PO associated with it and you are unable to edit the requisition because it says it has been sourced, you should contact the IS Service Desk and ask them to restart the process in the Process Monitor.

- When you have expedited a requisition and then it seems to go nowhere (a PO hasn't been created), you can use the "Sourcing Workbench" to diagnose the problem and move the requisition out of the sourcing tables. Click on the "Sourcing Workbench" option on the left nav./menu when you are in the "Requisition to PO & Receiving" tile from the Purchasing & Accts Payable homepage:
    - Once there, you can select various "State Status" options (most of the time they are under "Error", so that is a good place to start, if you leave this field blank it will take forever to load because all the successes will show up as well):

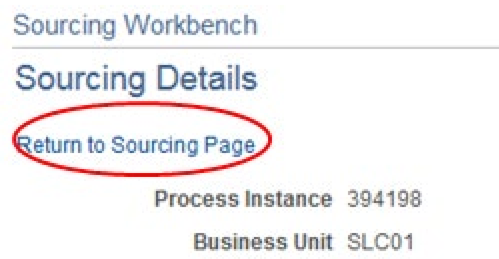


    - Next, find your name in the "Buyer" column, or req number in the "Requisition ID" column and then click on the  icon to get the details of the error, for example:

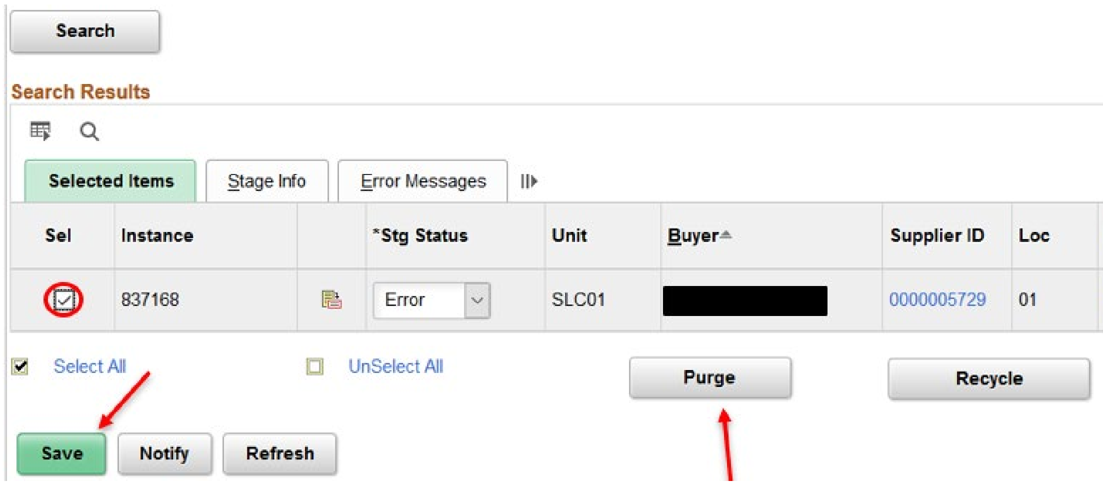


        - This particular error message tells you that the supplier is inactive, get in touch with the Supplier Team, suppliers@saltlakecounty.gov, and see when they are going to activate the supplier (any time a change is made to the supplier, it is flipped to unapproved, and must be approved by another set of eyes. The process usually doesn't take very long.)

    - Once you know what the error detail is, click "Return to Sourcing Page" toward the top of the screen:



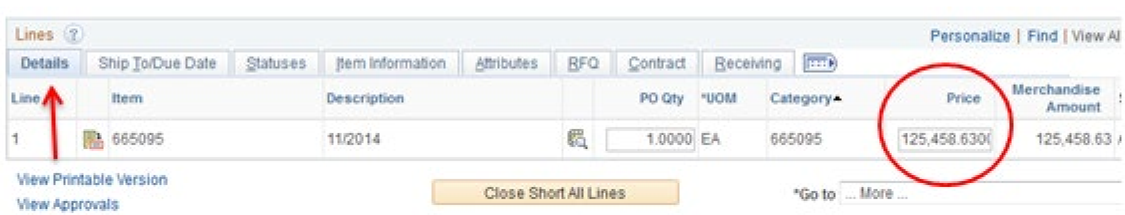
- Then click on the box to the left of the "Instance" number, followed by "Purge", and finally "Save":



- This will kick it back to your "Expedite Requisitions" screen and allow you to re-source to a PO once the error is resolved. (Note: If the error is that the contract maximums would be exceeded, please get in touch with Rachael, [Contracts Administrator](), to verify the amounts on the contract and the best way to proceed).

PURCHASE ORDER – CLEAR OUT/CANCEL ENCUMBRANCE

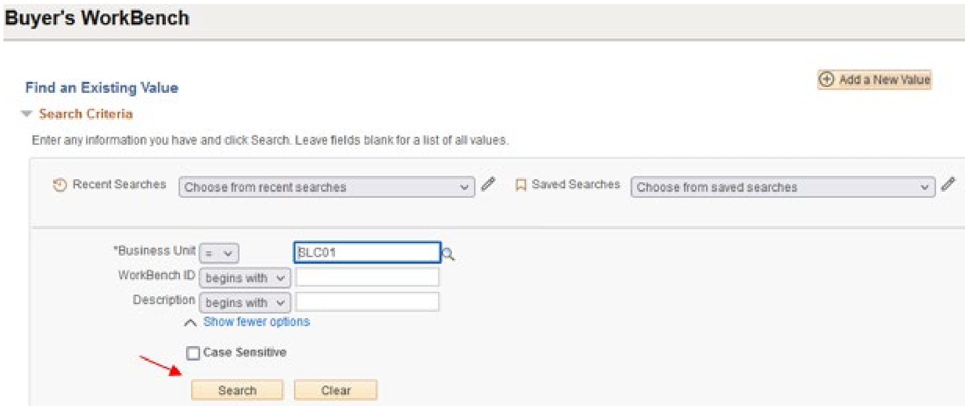
- If you have a *current year* PO that is linked to a contract and you need to clear out the encumbrance, simply change the price on your PO: From the "Manage Purchase Order" screen you can adjust the amount in the "Price" field (on the "Details" tab):



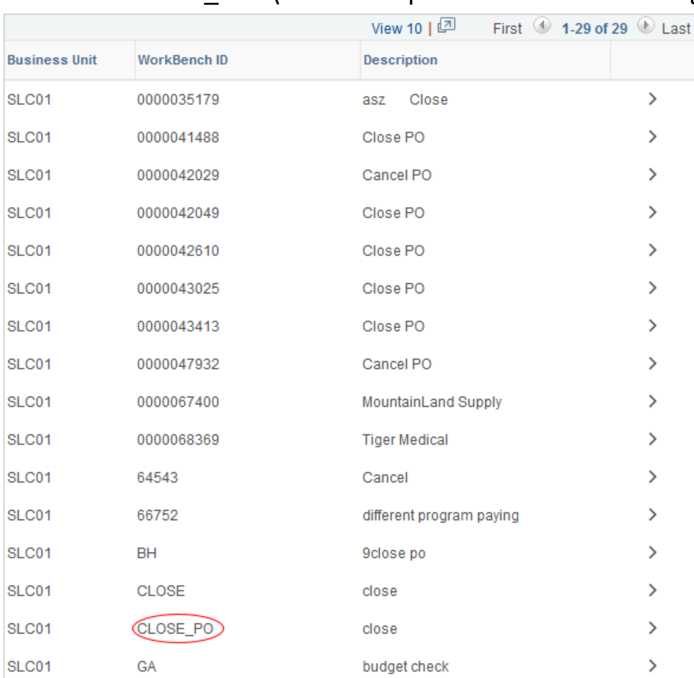
  - Then you will want to "Finalize" the document (so that no pre-encumbrance lingers on the requisition) by clicking on the "Finalize Document" icon, up by the "Budget Status":

- After finalizing, you will need to do another budget check, it will kick back to “Not Chk’d”, and if the PO was previously dispatched, you’ll need to re-dispatch it.

- To close a PO that still has encumbered funds to free up the encumbrance use the “Buyer’s Workbench” by clicking the “Buyer’s Workbench” tile on the Purchasing & Accts Payable homepage, and click “Search”:



  - Then click “Close_PO” (all of the options do the same thing, so you can select any of them):



View 10 | First 1-29 of 29 Last

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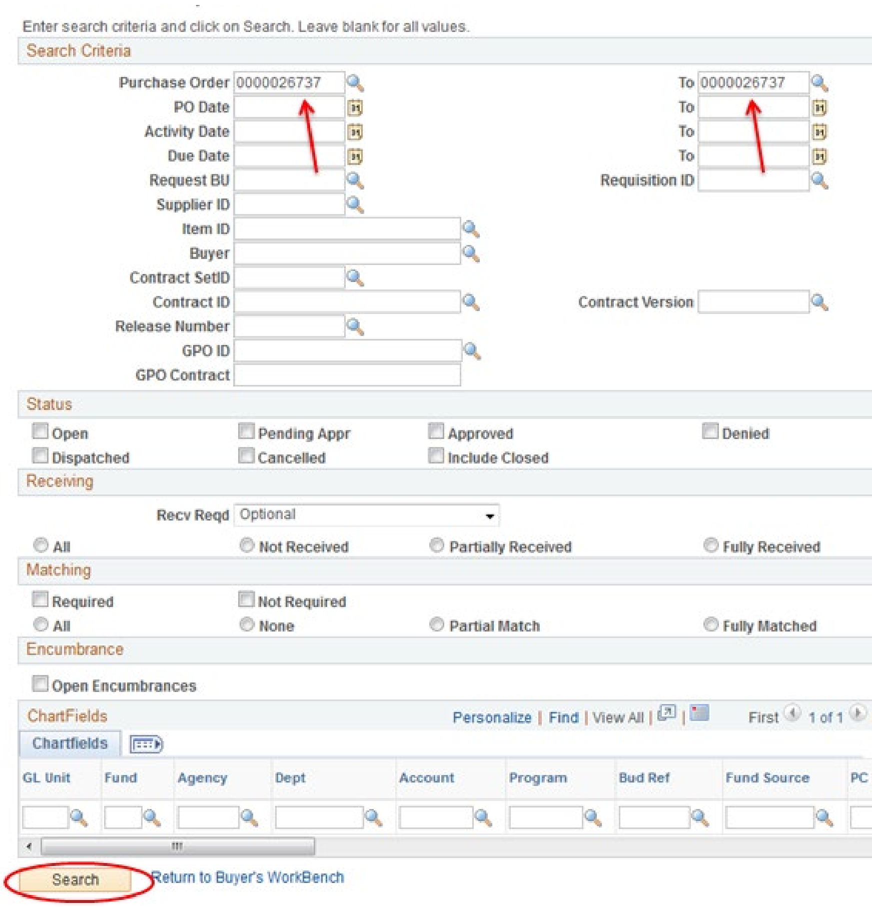
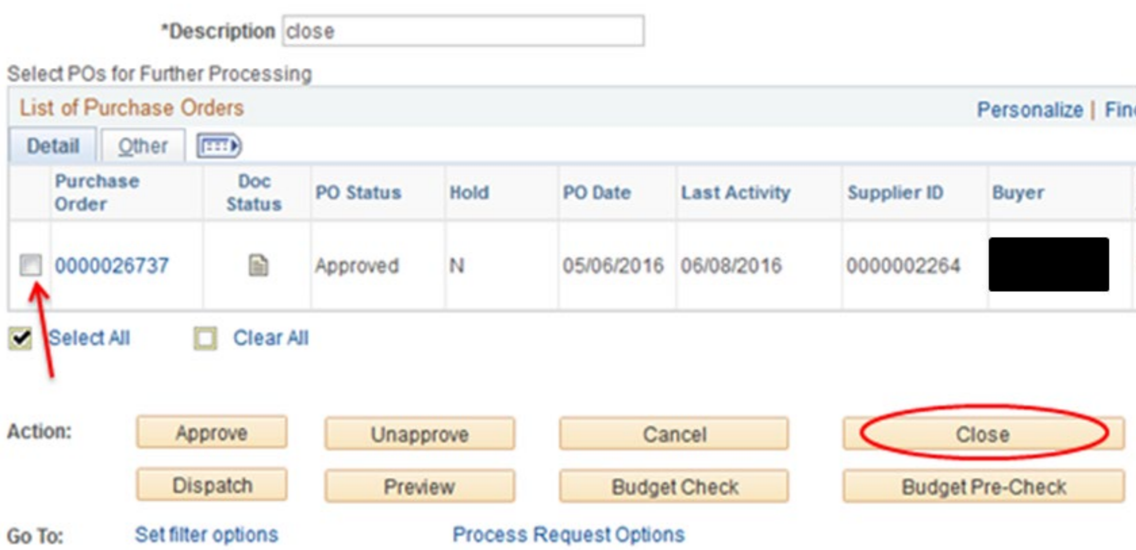
SLC01	BH	9close po
SLC01	CLOSE	close
SLC01	CLOSE_PO	close
SLC01	GA	budget check

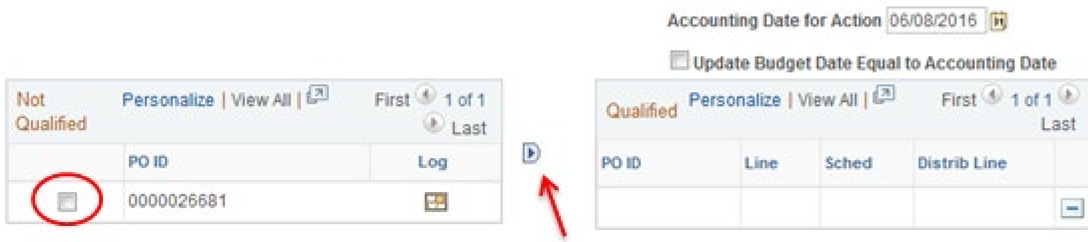
  - Enter your PO number in the “Purchase Order” and “To” fields then click “Search”:



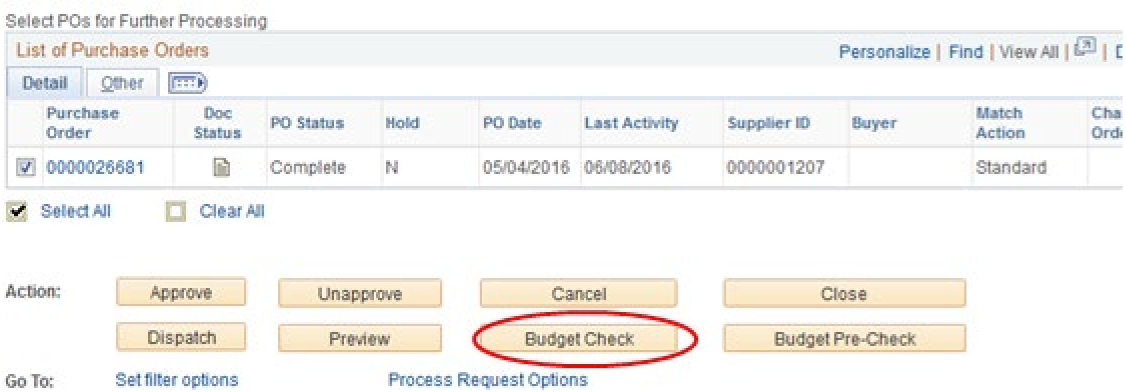
- Next, click the box to select the PO and then click “Close”:



- The PO is currently “Not Qualified”; you can click on the “Log” to find out why. If there is an arrow in the middle, as shown below, you can check the box and click to arrow to force the qualification:

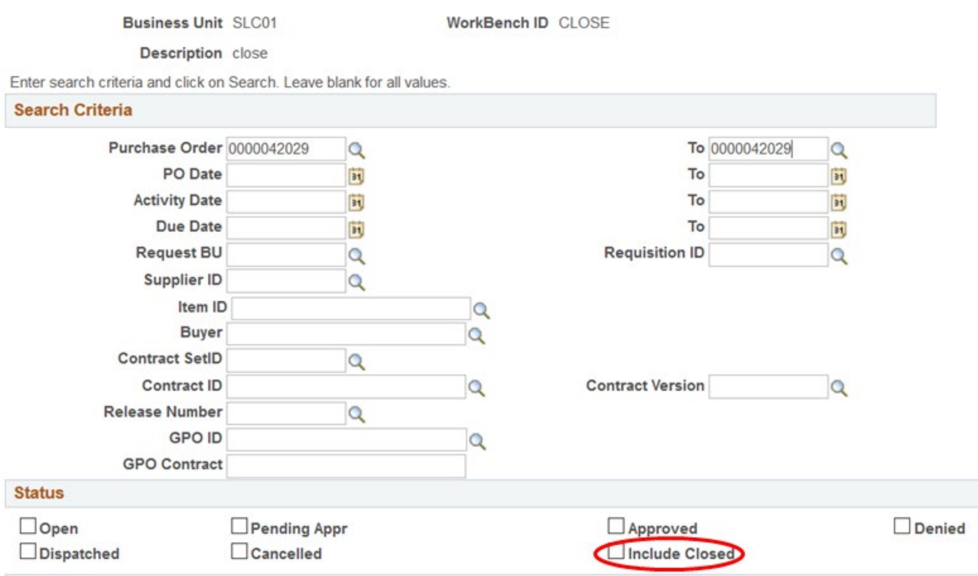


- Then click "Yes" to proceed. It will bring you back to the Buyer's Workbench and you need to click on "Budget Check" to free up the funds:



- Finally, click on "Yes" to proceed again.

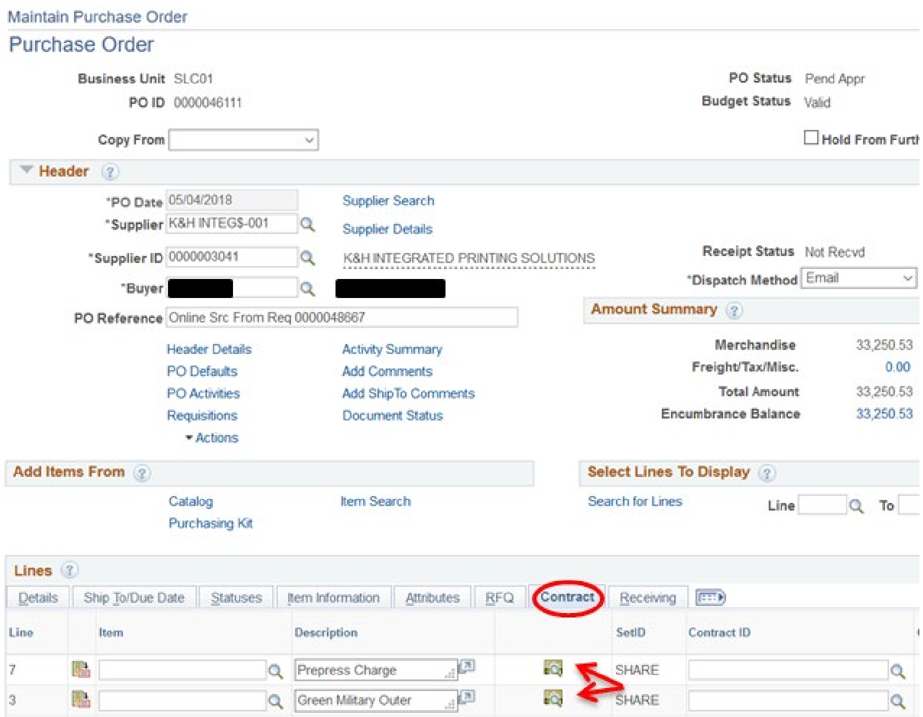
- If you have closed a PO via the Buyer's Workbench, but forgot to Budget Check, the encumbrance still exists. You will need to go back to the Buyer's Workbench, put in the PO number, as you normally would, in both the "Purchase Order" and "To" fields, but then below that check the box that says "Include Closed":



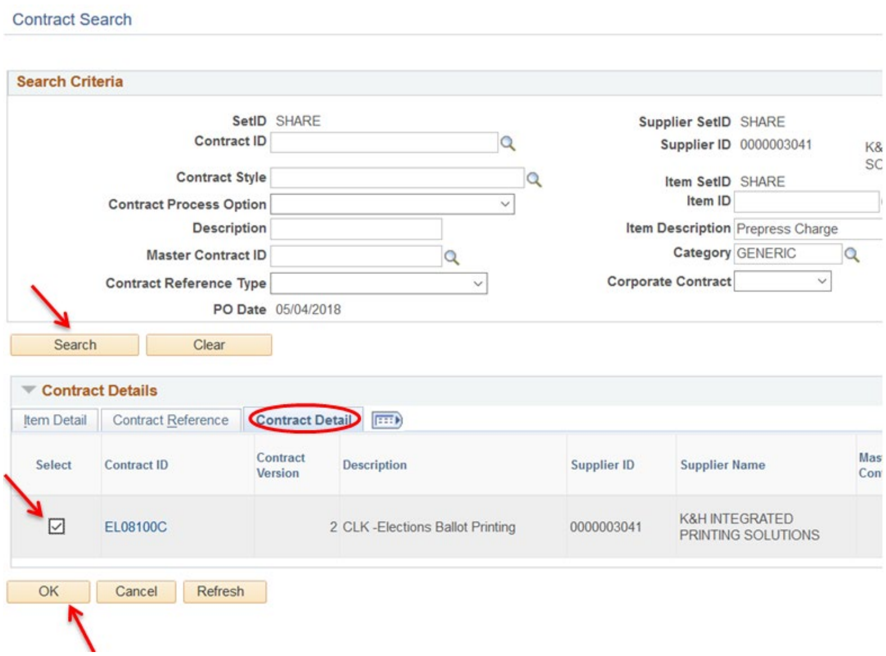
- Then when you search the PO will come up and you will be able to perform the Budget Check to release the encumbered funds.

PURCHASE ORDER - CONTRACT

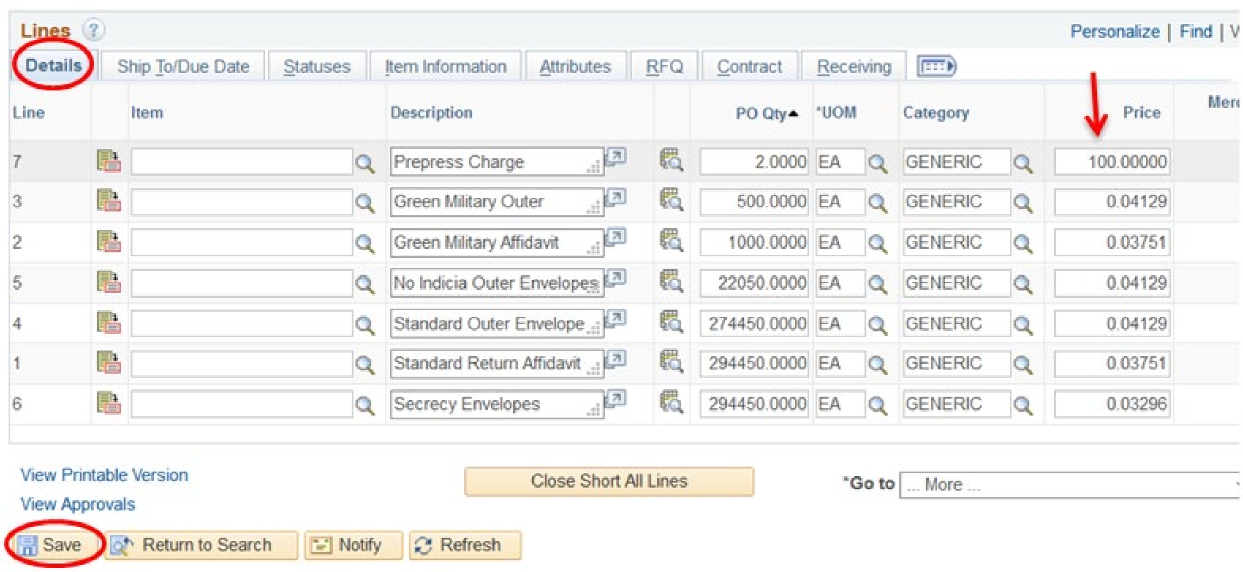
- Contracts should be linked to purchases at the requisition level, however, if you have forgotten, here are the steps to adding the contract to the PO:
  - Open your PO for editing, toward the bottom of the "Maintain Purchase Order" screen click on the "Contract" tab, then click on the "Contract Search" icon to search for the contract ID (if you have more than one line, be sure to add the contract to each line):



  - On the "Contract Search" screen, when you click "Search" it will automatically bring up any contract with your Supplier (if multiple contracts come up check the "Contract Detail" tab to make sure you select the correct contract), just click on the contract you need and click "OK":



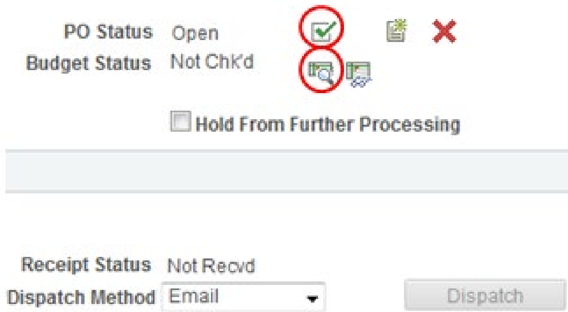
- Once you have selected your contract click "Save". You may have to exit that screen and then go back in to move forward.
- If your PO was in a "Pend Appr" state, the system will not recognize the contract has been added if you did not use the Contract Search icon to the *left* of the Contract ID field (as outlined above) and simply saving the contract does not cause the PO Status to be "Approved"; in this case, either go back to the contract tab and use the Contract Search icon, **or** change the "Price" of your PO, on the "Details" tab, down by $1 (or whatever amount), click "Save", then put the "Price" back up to the original amount and click "Save" again:



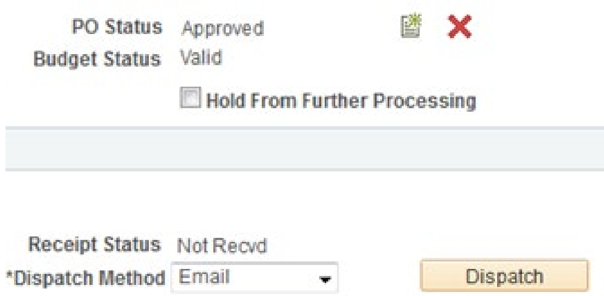
- Your PO Status will now be "Approved" and you can move forward.

PURCHASE ORDER - DISPATCHING

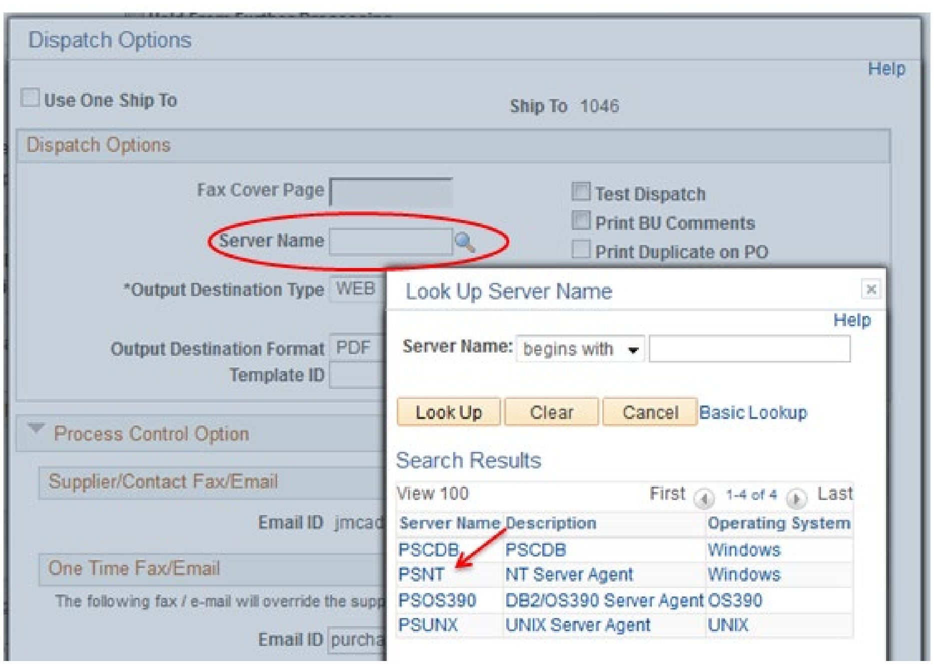
- If the “Dispatch” button on your PO is grayed out, click the “Submit for Approval” icon (green checkmark), then the “Budget Check” icon (magnifying glass) in the upper right-hand corner:



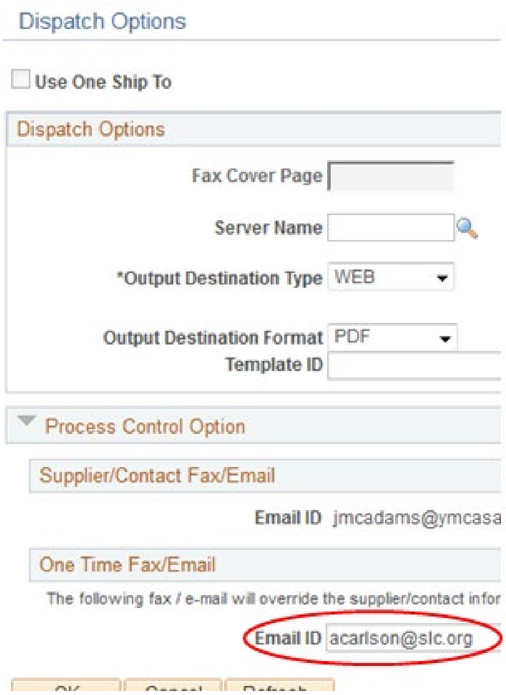
  - Once the “PO Status” is “Approved” and the “Budget Status” is “Valid”, the “Dispatch” button is available:



- If you get a “Server not Found” message when trying to dispatch, on the “Dispatch Options” screen that comes up when you click “Dispatch”, select “PSNT” in the “Server Name” options:



- If your PO just will not dispatch, nothing happens: check the email address you entered on the "Dispatch Options" screen, if the email address is invalid the PO will not dispatch:



- When dispatching your PO if you get an error message that says the PO is "being processed by batch programs" there is a bug in the system with the auto-numbering that will cause this. The batch process to dispatch needs to be restarted in the "Process Monitor", that tile can be found on the Purchasing & Accts Payble homepage. If you are unable to restart the process, open a ticket with IS and let them know which instance is hung up.

- Not all POs need to be signed: If your PO needs to be sent to the Supplier, then the Mayor/Designee will need to sign it to make it a fully executed, valid document. You can email it to slco-purchasing@saltlakecounty.gov, and Contracts & Procurement will take care of getting the appropriate signature(s). If your PO is *not* being sent to the Supplier, then you can keep it for your records without sending it through for signatures.

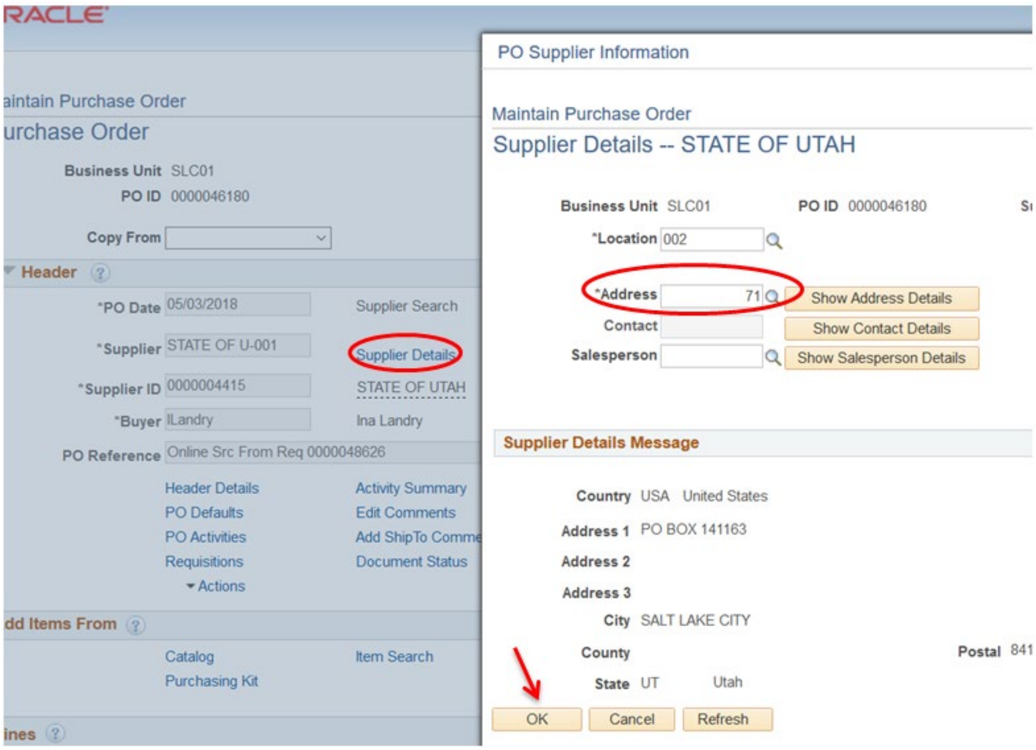
- When dispatching your POs, you should dispatch to yourself (or your Agency's generic email for POs, if you have one). Then if your PO needs to be executed send it on to slco-purchasing@saltlakecounty.gov.

- If you do not need a copy of your PO, feel free to change the "Dispatch Method" to "Phone" and then the PO will dispatch without sending an email:

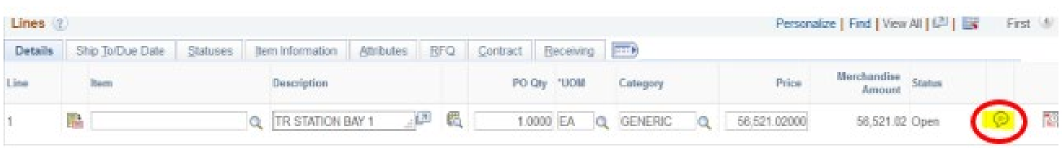
PURCHASE ORDER - EDITING

- There is not a way to "un-dispatch" a PO and recall the PO that was dispatched; however, you can make edits to a dispatched PO. It will kick the "PO Status" back to "Approved" and you will need to re-dispatch the PO.

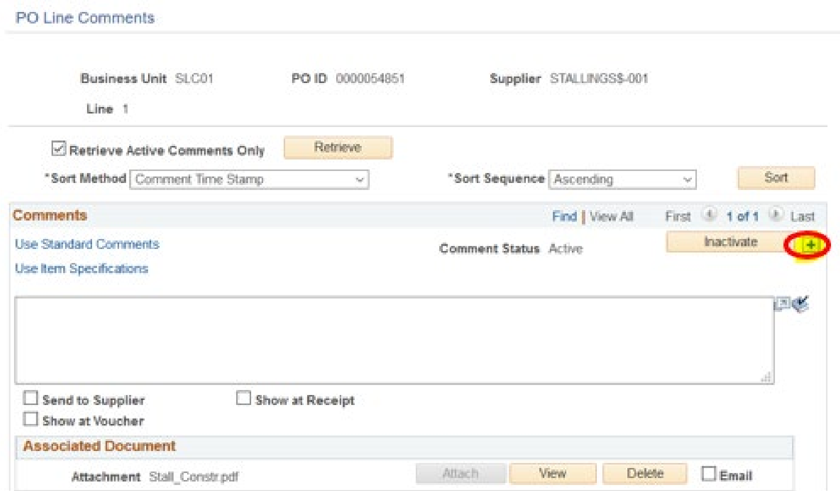
- If your Supplier has multiple addresses, in order to get the payment to the correct location, you will need to select the appropriate address on the PO. On the Maintain Purchase Orders screen, click on "Supplier Details", then select the correct address and click "OK":



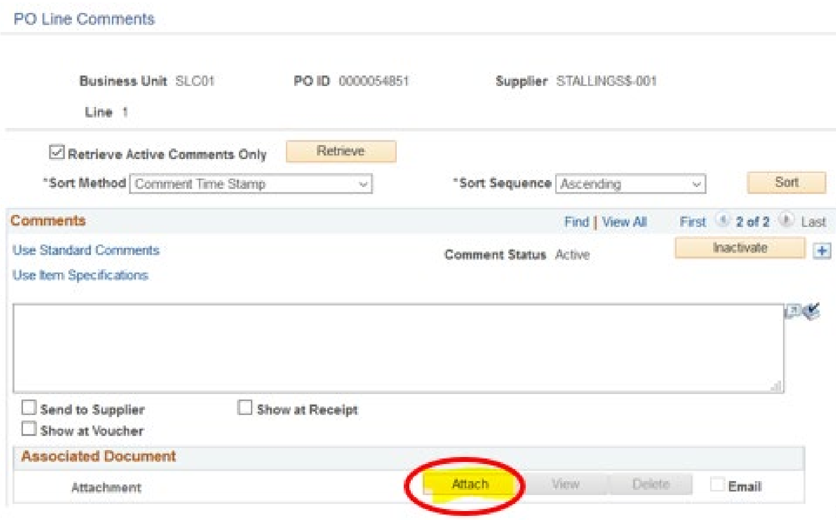
- Increasing PO Amounts (current year POs **only**): Sometimes quotes are received that don't include shipping, so when the invoice is received the PO is short the amount of shipping. You can simply make the change to the PO price, on the "Maintain Purchase Orders" screen. You should also attach your new back-up to the PO line by simply clicking on the "Comments" icon on the bottom of your PO:



Click the + icon to be able to add additional documentation:

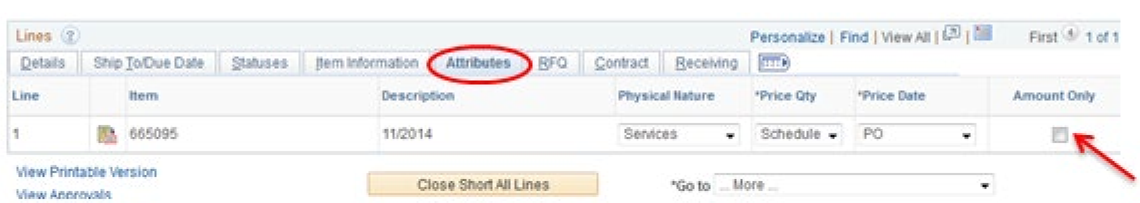


Then click "Attach" and find your attachment and attach like you do on requisitions:



The change will require new approvals from your fiscal approver(s), and once approved you can do a new budget check and re-dispatch the Purchase Order. Please note: Any change to a PO amount **must be done in the same budget year.** If you try to change a PO amount from a different year you will likely lose your encumbrance because you won't be able to re-budget check the PO and AP will no longer be able to pay from it.

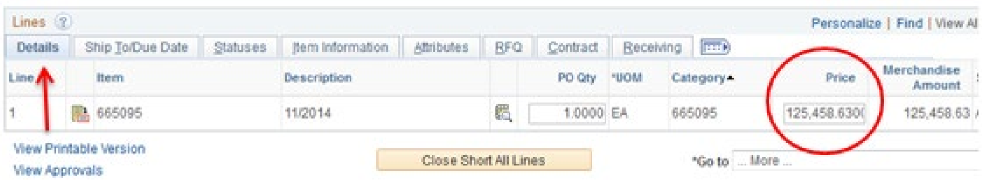
- If you forgot to check the "Amount Only" box on your requisition, you don't have to cancel your PO; you can still make that designation on the "Maintain Purchase Order" screen, click on the "Attributes" tab toward the bottom of the screen and check the "Amount Only" box (for current year POs):



  - Note: the quantity on your PO must be 1 when designating amount only, as it should be used for services only.

- If your PO was already dispatched, making this change will require you to re-budget check your PO (it will remain dispatched though).

- If your PO needs to be for *less* than the approved amount from your requisition: From the “Manage Purchase Order” screen you can adjust the amount in the “Price” field (on the “Details” tab):

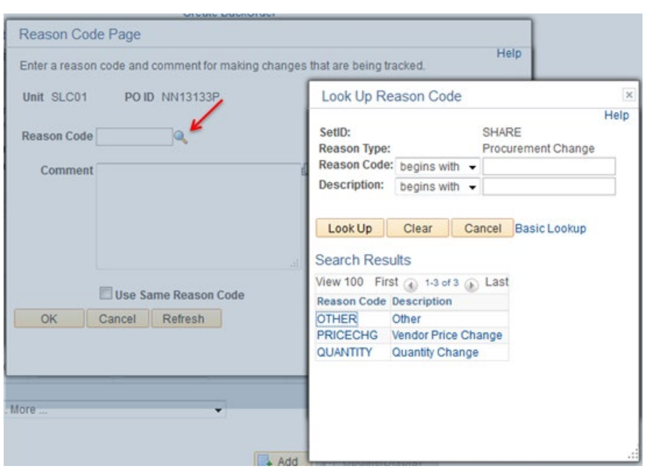


  - Then you will want to “Finalize” the document (so that no pre-encumbrance lingers on the requisition) by clicking on the “Finalize Document” icon, up by the “Budget Status”:

  - After finalizing, you will need to do another budget check, it will kick back to “Not Chk’d”, and if the PO was previously dispatched, you’ll need to re-dispatch it.

- If your invoice comes in for *less* than your PO amount and your PO is designated “Amount Only” you can send your invoice to Accounts Payable and let them know to Finalize, and they will liquidate the remaining balance of the PO once the voucher is created for payment.

- When making price changes to the PO after it has been dispatched, it will create a Change Order to the PO and ask you for a “Reason Code”. This is just for tracking, when the screen comes up, click on the magnifying glass and simply select the appropriate reason. You can also add additional comments in the comments section if need be:

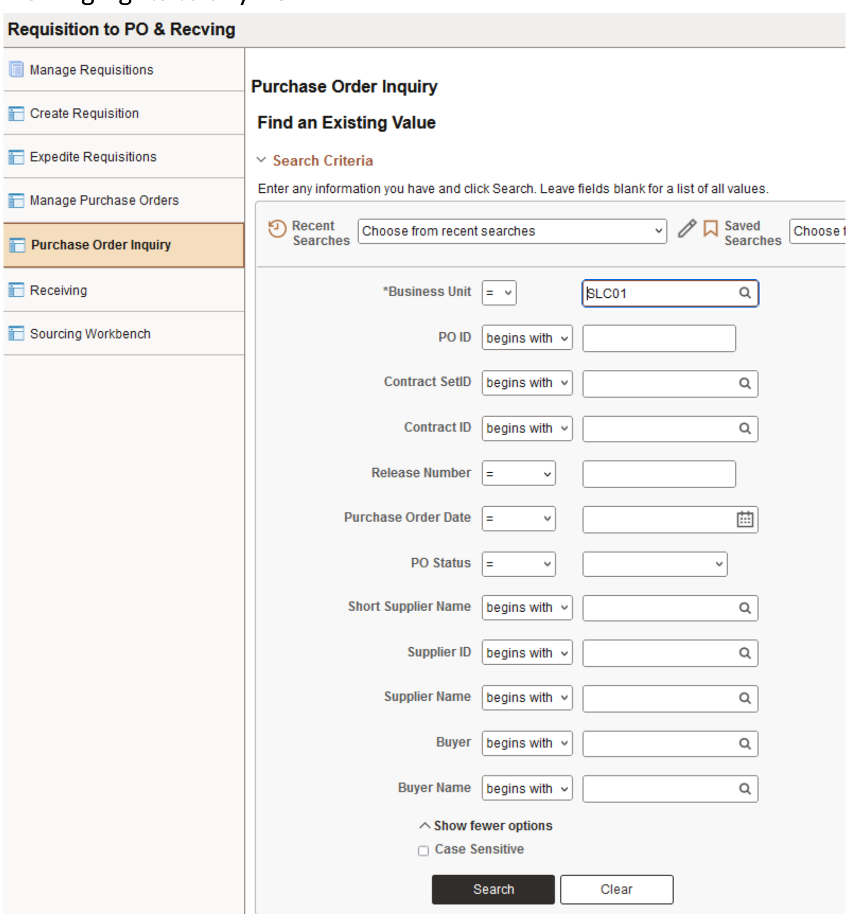


PURCHASE ORDER - ERROR

- If you receive an error when attempting to save your PO that says “Error on line 1. Amount on schedule 1, not equal to the sum of distributions. When distributing by amount the distributions must sum the amount of their schedule”, unfortunately, you will need to cancel your PO. There is a bug that causes this from time to time.
    - After you cancel your PO, you will need to go to the “Requester’s Workbench” and cancel/close the lines on the requisition that it will allow.
    - Then go back to your “Manage Requisitions” screen and budget check the req. to get a valid budget status.
    - Once there is a valid budget status, go back to the “Requester’s Workbench” and cancel/close the requisition.
    - You will then need to create a new requisition.

PURCHASE ORDER – LOOK-UP

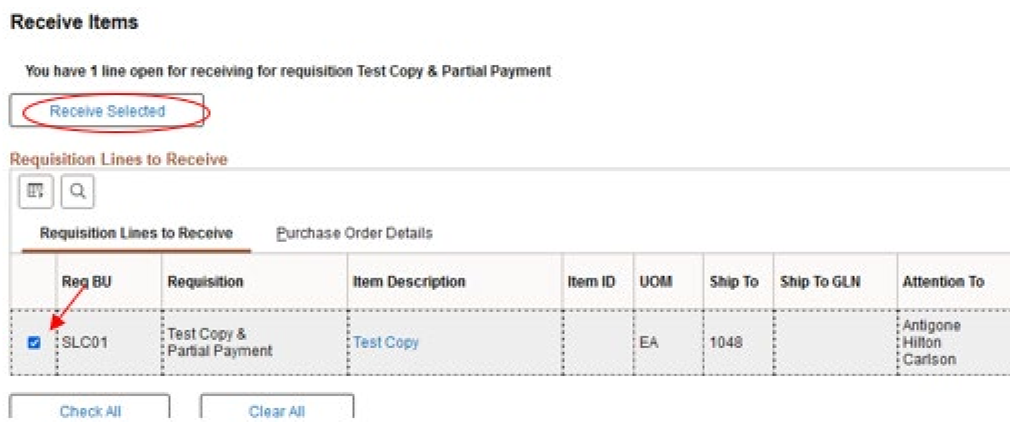
- When you need to look up a PO that you did not create (either one that Contracts & Procurement or someone else that you don’t have access to created it), instead of looking at “Manage Purchase Orders” where you would search for your own, click on the “Purchase Order Inquiry” option in the left nav./menu, located within the “Requisition to PO & Receiving” tile on the Purchasing & Accts Payable homepage, and you can access the viewing rights to any PO:



PURCHASE ORDER – MATCHING ERROR

- After sending an invoice to Accounts Payable, if you receive an email stating there is an error in the matching process the system is doing a 3-way match and is looking for a receipt. If you have purchased a service, you can go in and designate your PO “Amount Only”. If you have purchased goods, you will need to receive the items (see pg. 35 for instruction on how to receive when you didn’t create the req/PO). Go to “Manage Requisitions” and select “Receive” from the drop-down menu on the right-hand side of the requisition, then “Go”:

  - Check the box and click “Receive Selected”:



  - Enter the quantity you received and then click “Save Receipt”:

  - Let Accounts Payable know the item(s) has been receipted and they will now be able to make payment.

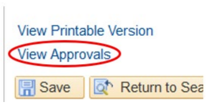
- If you receive a “Matching Error – S-210 Status Changes from Dispatched to Approved” error, the PO simply needs to be re-dispatched.

PURCHASE ORDER – PARTIALLY SOURCED

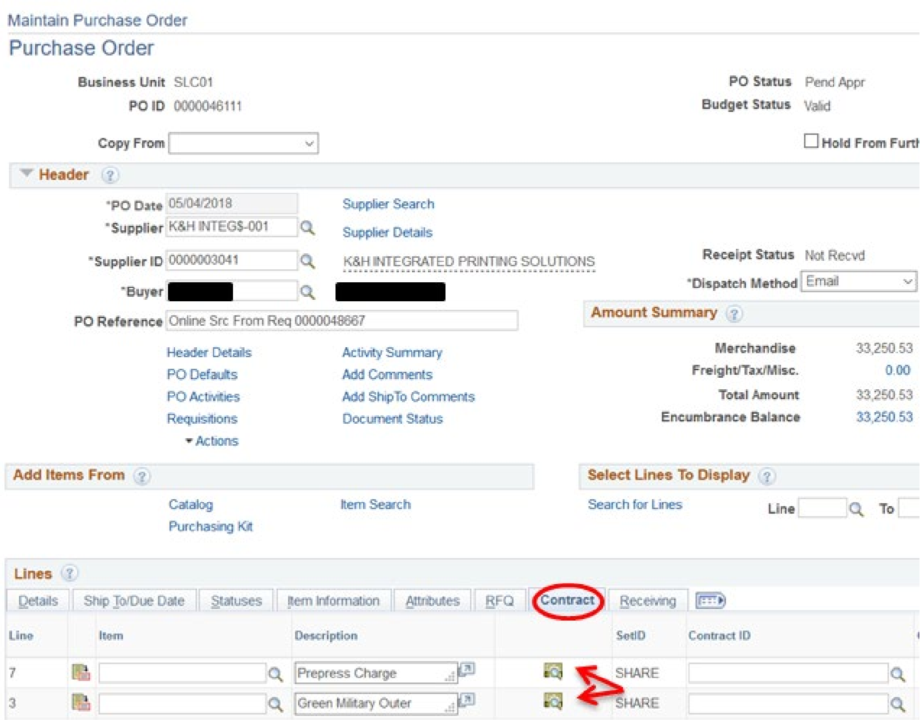
- If you have multiple lines on a requisition but only one or some will source onto a PO the reason is, likely, that the additional line(s) will put the contract over the maximum amount. You’ll want to check the Sourcing Workbench and verify the amount remaining on the contract before proceeding.

PURCHASE ORDER – PENDING APPROVAL

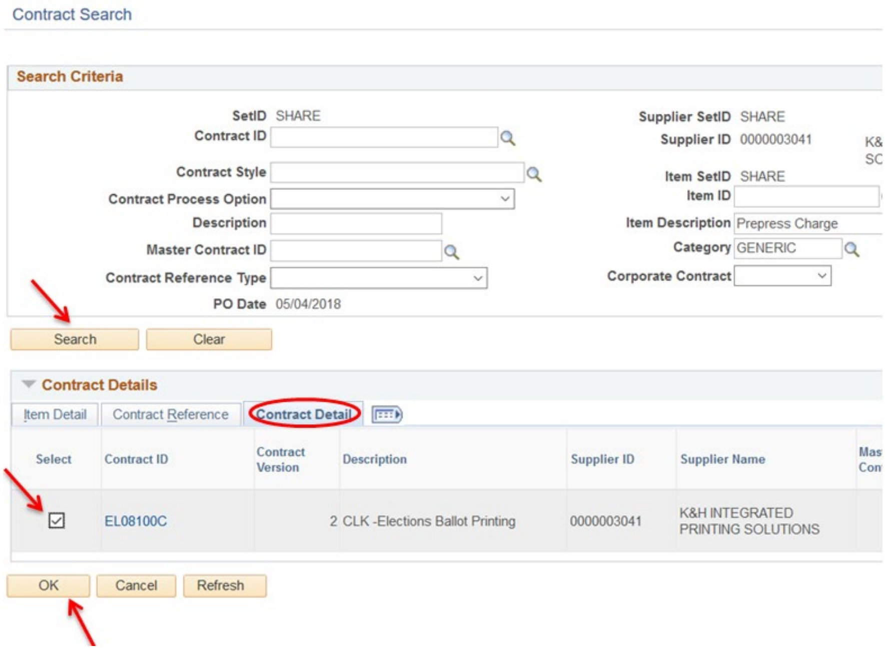
- If you increase the amount of your PO from the amount that was on the requisition, that change will require an approval from your department level approvers (those who approve your reqs). You can click the “View Approvals” hyperlink on the bottom of the PO to see whose approval you’re waiting on:



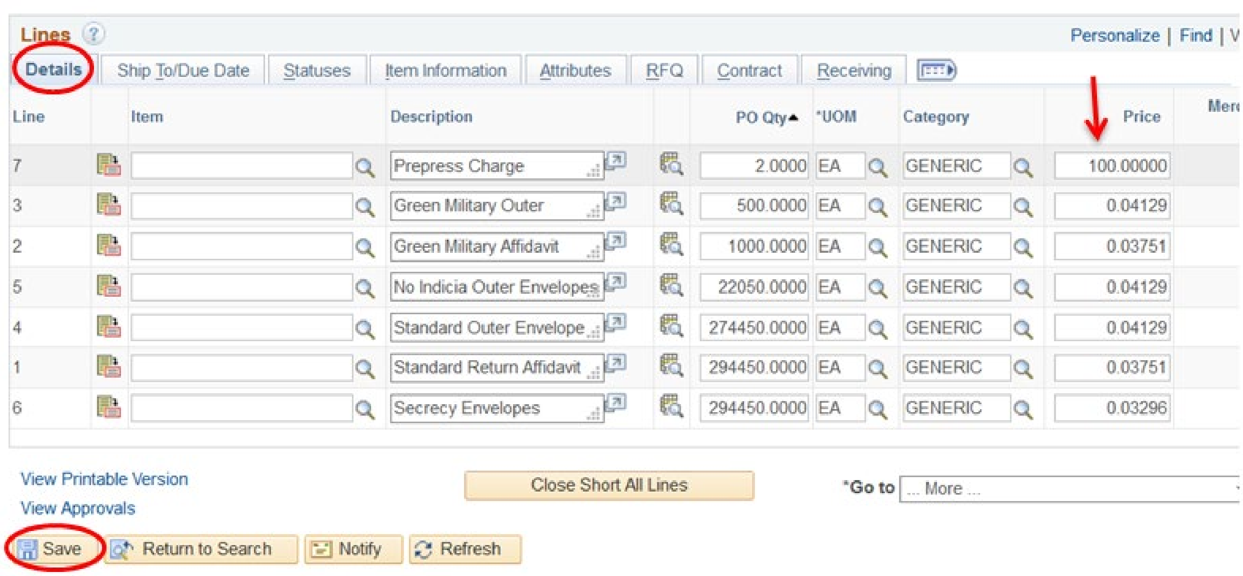
- If your PO has a status of “Pending Approval” and you haven’t increased your PO amount, likely, it is over small cost, $10,000, and a contract wasn’t linked:
    - Open your PO for editing, toward the bottom of the “Maintain Purchase Order” screen click on the “Contract” tab, then click on the “Contract Search” icon to the *left* of the Contract ID field to search for the contract ID (if you have more than one line, be sure to add the contract to each line):



- On the “Contract Search” screen, when you click “Search” it will automatically bring up any contract with your Supplier (if multiple contracts come up check the “Contract Detail” tab to make sure you select the correct contract), just click on the contract you need and click “OK”:



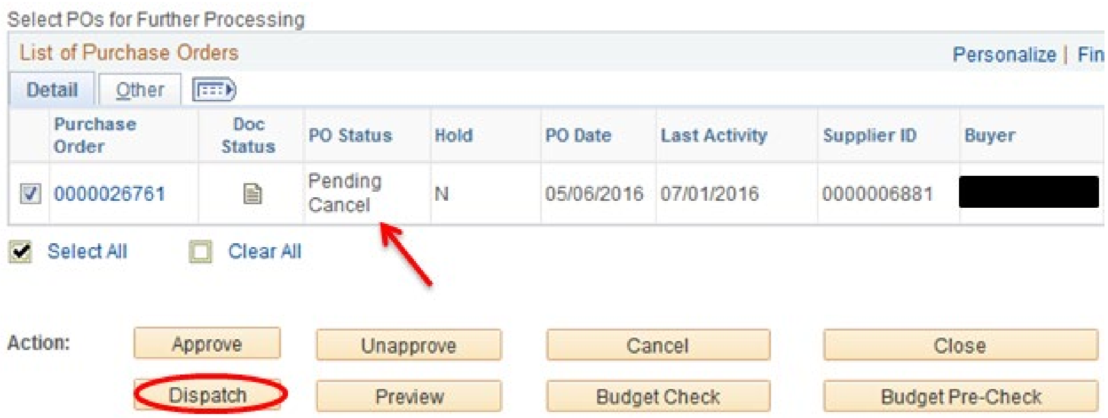
- Once you have selected your contract click “Save”. You may have to exit that screen and then go back in to move forward
- The system will not recognize the contract has been added if you did not use the Contract Search icon to the *left* of the Contract ID field (as outlined above) and simply saving the contract does not cause the PO Status to be “Approved”; in this case, either go back to the contract tab and use the Contract Search icon to attach your contract, **or** change the “Price” of your PO, on the “Details” tab, down by $1 (or whatever amount), click “Save”, then put the “Price” back up to the original amount and click “Save” again:



- Your PO Status will now be “Approved” and you can move forward.

PURCHASE ORDER – PENDING CANCEL

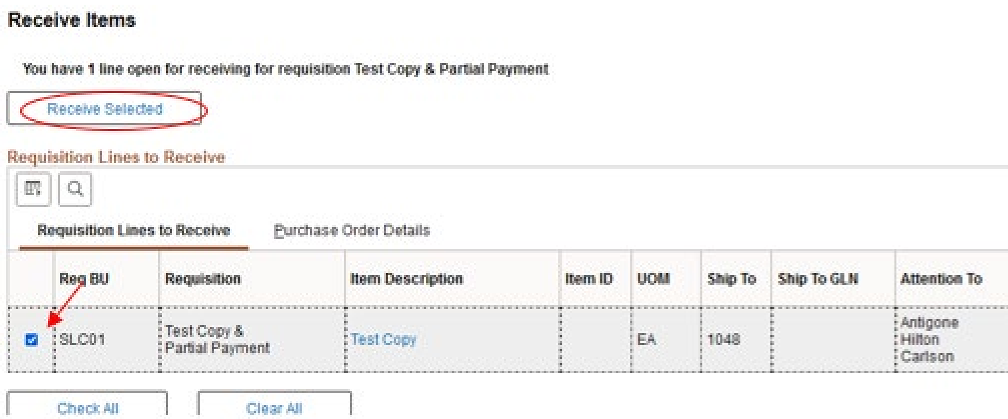
- If your PO has a status of “Pending Cancel” it is because you cancelled a PO that was previously dispatched; the system requires the PO to be dispatched again to fully cancel. You’ll use the Buyer’s Workbench tile located on the Purchasing & Accts Payable homepage to re-dispatch the PO (see pg. 12 above for using the Workbench):



PURCHASE ORDER - RECEIVING

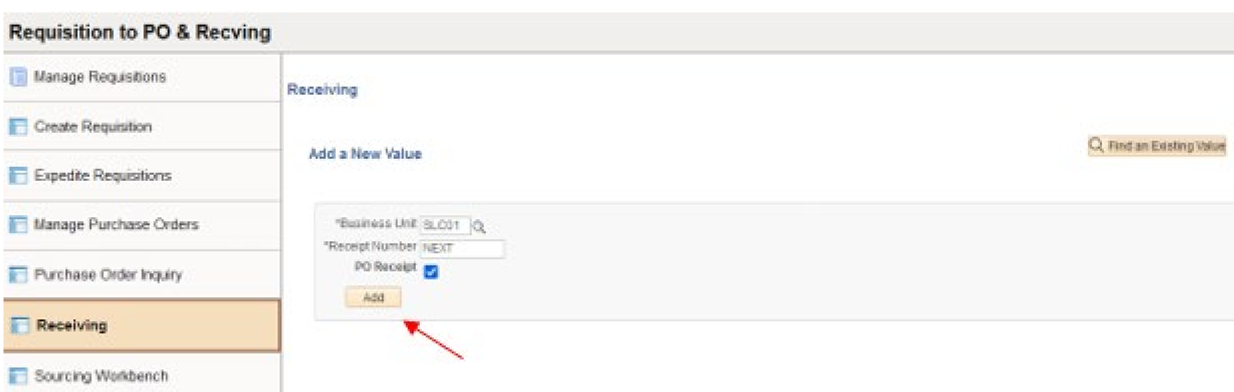
- The term “Receiving a Purchase Order” is a little misleading because you can actually receive from the “Manage Requisitions” screen, if it is a requisition that you entered. From the “Manage Requisitions” screen select “Receive” from the drop-down menu on the right-hand side of the requisition, then click “Go”:

- Check the box and click “Receive Selected”:

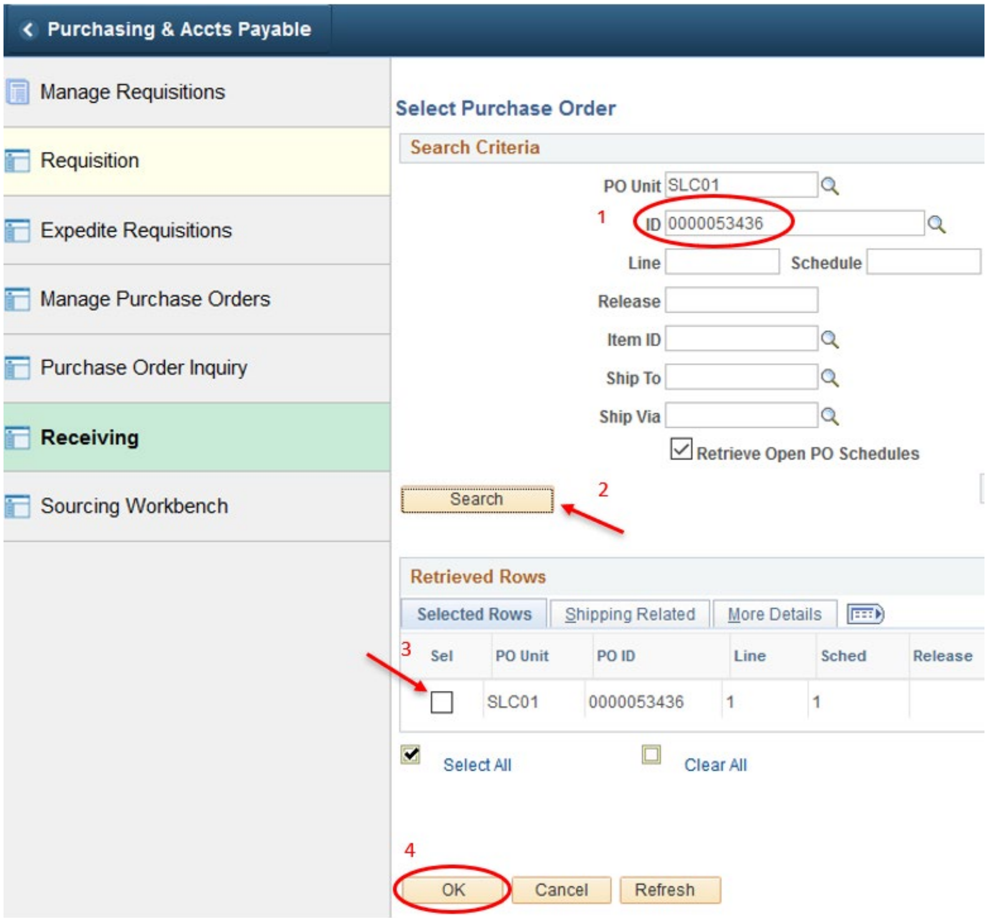


- Enter the quantity you received and then click “Save Receipt”:

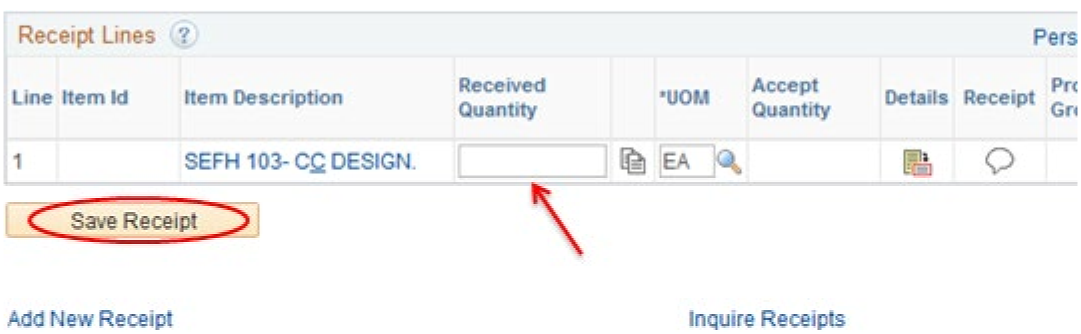
- If you need to receive items on a req/PO that you **did not** create, but that you have authority for, you will not be able to receive using the drop-down menu on the “Manage Requisitions” screen (you can only use that option if you entered the requisition). Instead, you will need to add a new receipt by going to “Receiving” on the left nav./menu in the “Requisition to PO & Receiving” tile from the Purchasing & Accts Payable homepage. Click “Add”:



- From there, type in the PO ID (you must enter the leading 0s) and then click “Search”; any available lines for receiving will come up. Simply select the lines you wish to receive and click “OK”:

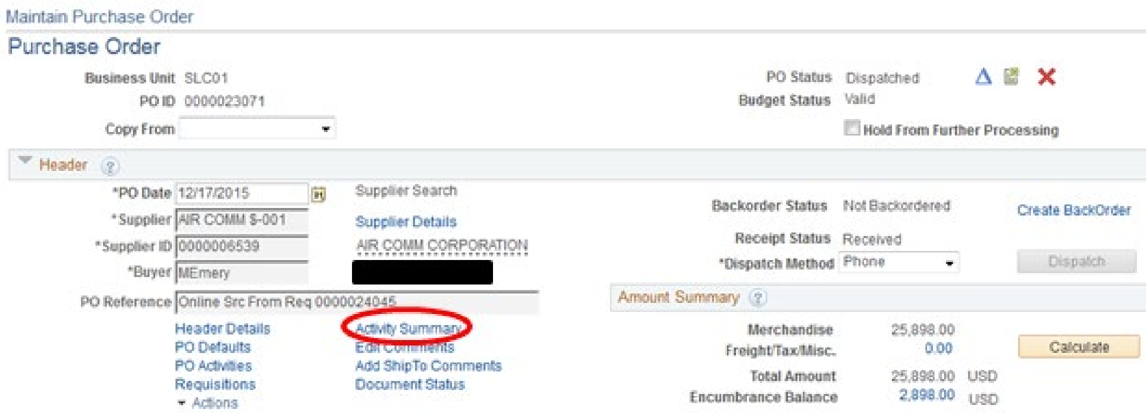


- Then you will enter the quantity received and click "Save":

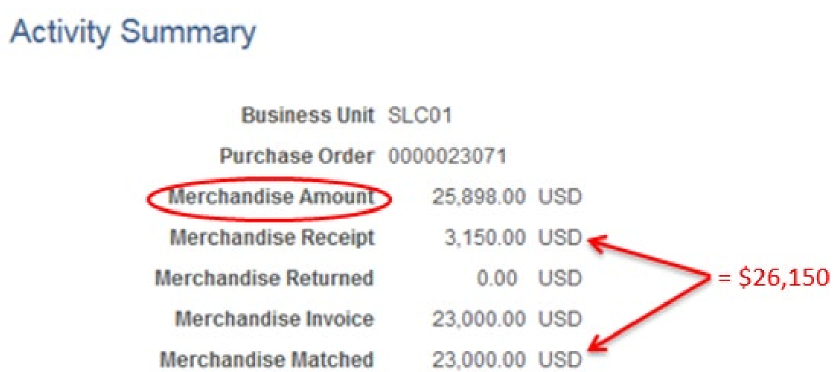


NOTE: This process can be used for your own purchases as well

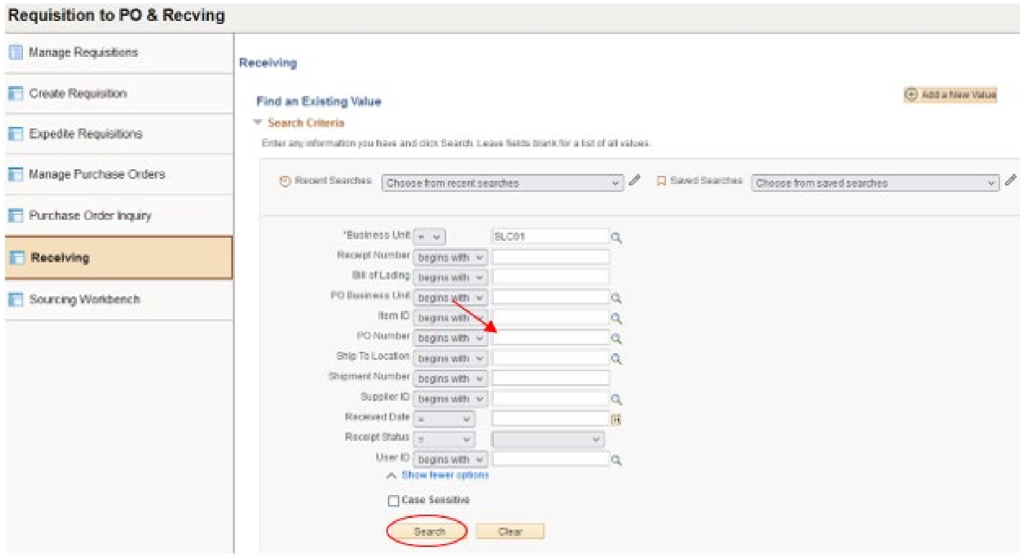
- If you have an encumbrance from a PO that is still showing up even though the PO is completely paid out, the issue is, likely, that when the item(s) was received, the quantity received was more than what was purchased. From the "Manage Purchase Orders" screen click on the "Activity Summary":



- You can check the “Merchandise Receipt” amount (in this case you can see that the “Merchandise Receipt” amount added to the “Merchandise Matched” amount puts the total $252 *over* the “Merchandise Amount”):



- To remedy, you will need to edit your receipt and fix the amount received. Go to “Receiving” on the left nav./menu in the “Requisition to PO & Receiving” tile from the Purchasing & Accts Payable homepage, select the “Find an Existing Value” tab, enter your PO number, and click “Search”:



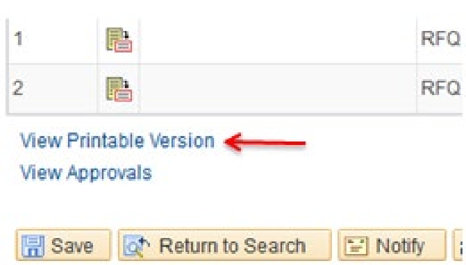
- Edit the “Receipt Qty”, and click “Save”:

PURCHASE ORDER – STATUS DEFINITIONS

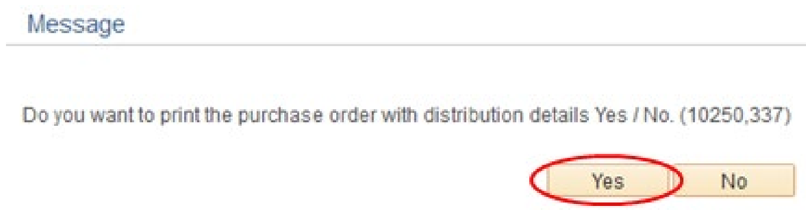
PO Status	Means	Next Step
"Approved"	PO has been approved	Do a "Budget Check" and then "Dispatch"
"Complete"	Closed/Valid	No other work to be done
"Dispatched"	The PO has been dispatched.	Wait for the invoice or the goods to be received
"Open"	PO needs to be worked	Go to "Header Details" and update the correct PO Type, Billing Address, and email If multiple addresses, go to "Supplier Address" and update address If you have something to attach, go to "Comments" to attach
"Pend Appr"	The PO is over small cost and not linked to a contract	Need to link to a contract
"Pend Cncl"	Need to dispatch the PO to change this from "Pending Cancel" to "Cancelled"	Need to dispatch the PO to change this from "Pending Cancel" to "Cancelled" Use the "Buyer's Workbench" to dispatch the PO: Main Menu>Purchasing>Purchase Orders>Buyer's Workbench (PO will need to be budget checked first)

PURCHASE ORDER – VIEW PRINTABLE

- To view your PO with the accounting lines showing; from the "Maintain Purchase Order" screen click "View Printable Version" (just above the "Save button):



- A screen will pop up asking if you want to print the distribution details, click "Yes":



- If you get an SQL error, check your pop-up blocker.

POP-UP BLOCKER

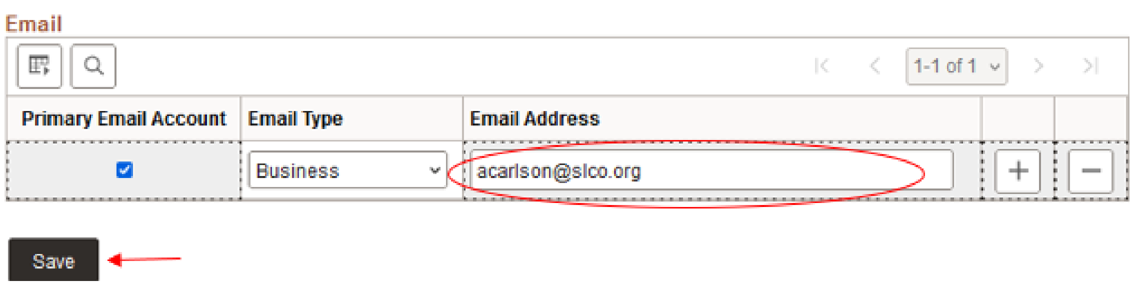
- If you are trying to view a document and nothing comes up or if you get an SQL error when attempting to view a line, check to make sure your pop-up blocker is off; that should resolve the issue.

PRIOR YEAR FUNDS

- Goods ordered and services received in the previous year can be entered as requisitions and POs in January using the prior year funds. Instructions for this process will be sent out yearly, just remember you'll need to change the "Requisition Date" to the prior year.

PROFILE

- If your email address is wrong in PeopleSoft. Go to the Compass Icon>Navigator>My System Profile and edit your email address and click "Save":

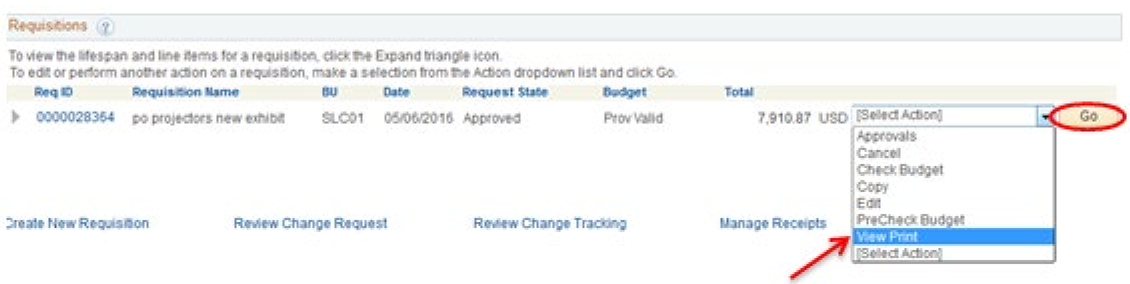


QUERIES

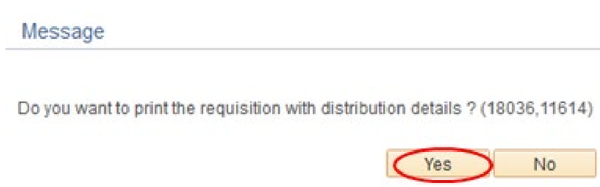
- If you need to query payments made on any given contract use: “SLC_CONTRACTS_VOUCHERS”.
- If you need to query encumbrances use: “MFA_OPEN_ENCUMBRANCES” (all open encumbrances) **OR “**MFA_OPEN_ENCUMBRANCES_BY” (all current year open encumbrances)
- If you need to query pre-encumbrances, use: “MFA_OPEN_PRE_ENCUMBRANCE” (all open pre-encumbrances) **OR “**MFA_OPEN_PRE_ENCUMBRANCE_BY” (all current year open pre-encumbrances)
- Visit Contracts & Procurement’s internal website for a broad list of queries that will be helpful called “Queries for Requesters”

REQUISITION – ACCOUNTING LINES

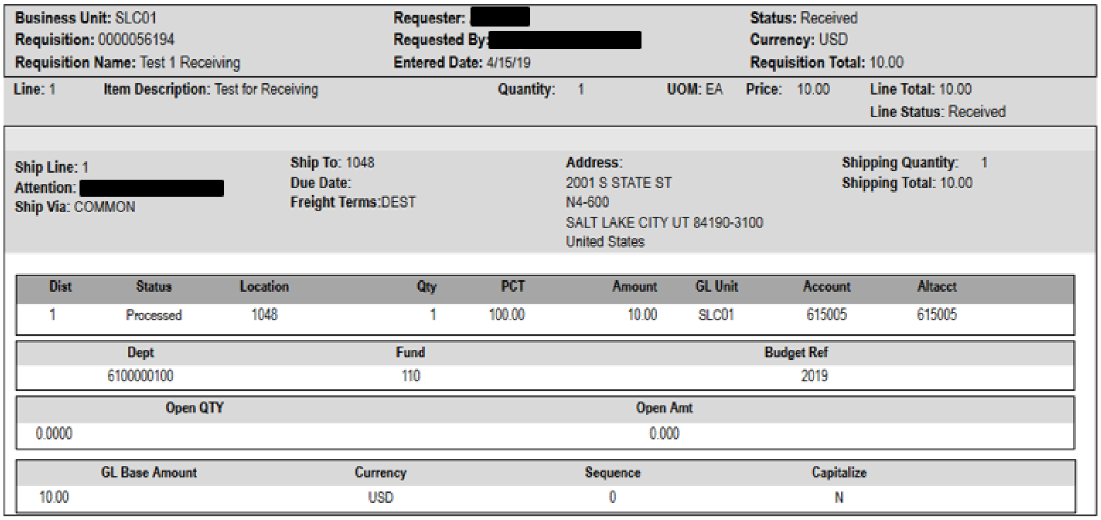
- You can have one line on your requisition designated as a service, and “amount only”, and have another that is a good on the same requisition.
- If you want to look at the chartfields that you assigned to your requisition after it has been approved (and you don’t want to edit the requisition), from the “Manage Requisitions” screen select “View Print” from the drop-down menu, then click “Go”:



  - Then click “Yes” to printing with distribution details:



  - Your chartfields will then pop-up in a new screen:



Business Unit: SLC01 **Requester:** [redacted] **Status:** Received
Requisition: 0000056194 **Requested By:** [redacted] **Currency:** USD
Requisition Name: Test 1 Receiving **Entered Date:** 4/15/19 **Requisition Total:** 10.00

Line: 1 **Item Description:** Test for Receiving **Quantity:** 1 **UOM:** EA **Price:** 10.00 **Line Total:** 10.00
Line Status: Received

Ship Line: 1 **Ship To:** 1048 **Address:** 2001 S STATE ST N4-600 SALT LAKE CITY UT 84190-3100 United States **Shipping Quantity:** 1
Attention: [redacted] **Due Date:** **Shipping Total:** 10.00
Ship Via: COMMON **Freight Terms:** DEST

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account	Altacct
1	Processed	1048	1	100.00	10.00	SLC01	615005	615005

Dept	Fund	Budget Ref
6100000100	110	2019

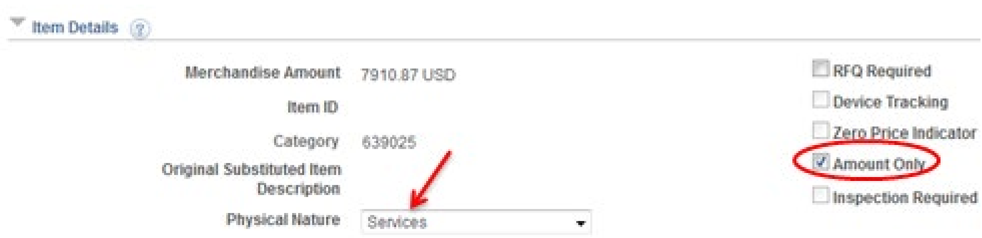
Open QTY	Open Amt
0.0000	0.000

GL Base Amount	Currency	Sequence	Capitalize
10.00	USD	0	N

REQUISITION – AMOUNT ONLY

- If you need to designate your requisition as "Amount Only" for services (goods should not be "amount only" and should be receipted), from the "Edit Requisition – Review and Submit" screen click on the "Details" icon:

- Next, change the "Physical Nature" to "Services" and click on the "Amount Only" box:



REQUISITION - APPROVALS

- When a requisition that you are approving needs to be revised before you will approve, you will want to put the requisition on “Hold”. When you “Deny” a requisition, the Requester will need to create a new requisition and cancel the denied requisition.

- If the Agency Line Level approval says “Skipped” and it gets routed to another group (that group has system administrators in it), the specific Department ID that was used on the requisition doesn’t have an approver associated with it in the Route Controls. Have the Division Director or Fiscal Manager email [Rachael] and let her know who the two approvers should be, and she’ll work with IS to get them set up.

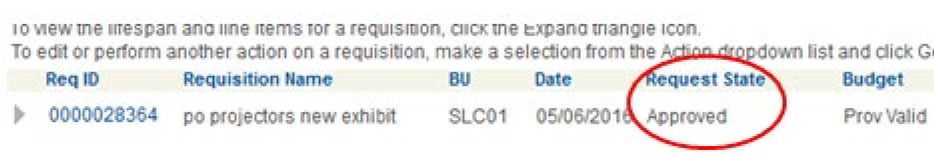
- Changing Approvers – to add or remove an Approver have the Division Director or Fiscal Manager email [Rachael] and request the change; she’ll work with IS to make the needed changes.

- If you have a requisition that cannot be accessed for approvals, it could be that your requisition has been cancelled. You have two options if this is the case:
  1) Start over, enter a new requisition
  2) On the “Manage Requisitions” screen select “Undo-Cancel” from the drop-down menu and then click Go:

  You will then be able to edit the requisition and submit it for approvals again.

- When your approver has approved a requisition, but the requisition is still showing “Pending” instead of “Approved”, it is because the Cap. Asset Team still needs to approve the requisition.

- If your approver gets an error when trying to approve your requisition, likely it is because one of the other approvers has already approved the requisition. You can double check that the req. has been approved by looking it up on the “Manage Requisitions” screen:

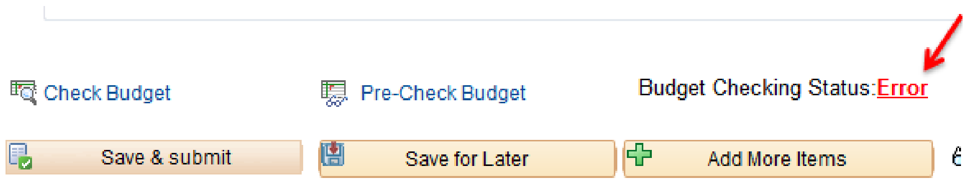


REQUISITION - ATTACHMENTS

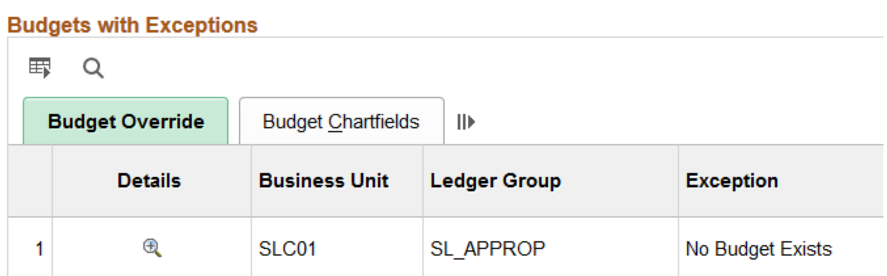
- If you are having trouble adding attachments to your requisition, try using Chrome or Firefox instead of Internet Explorer; this may be a browser issue.

REQUISITION – BUDGET ERROR

- When your requisition says, “Current Document has failed budget check” you can click on the red “Error” and it will give you the reason:



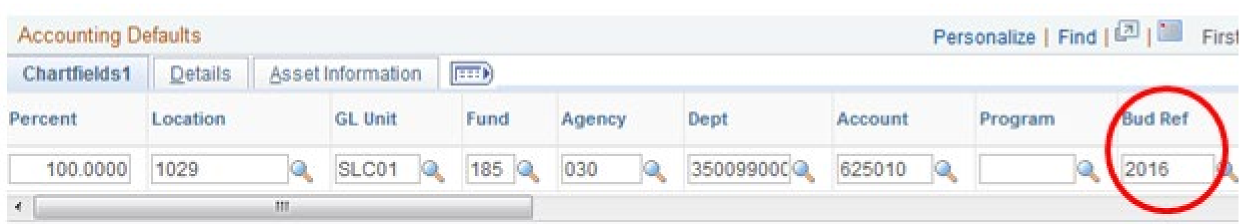
  - If the error is that “No Budget Exists”:


Budgets with Exceptions

Budget Override | Budget Chartfields

	Details	Business Unit	Ledger Group	Exception
1		SLC01	SL_APPROP	No Budget Exists

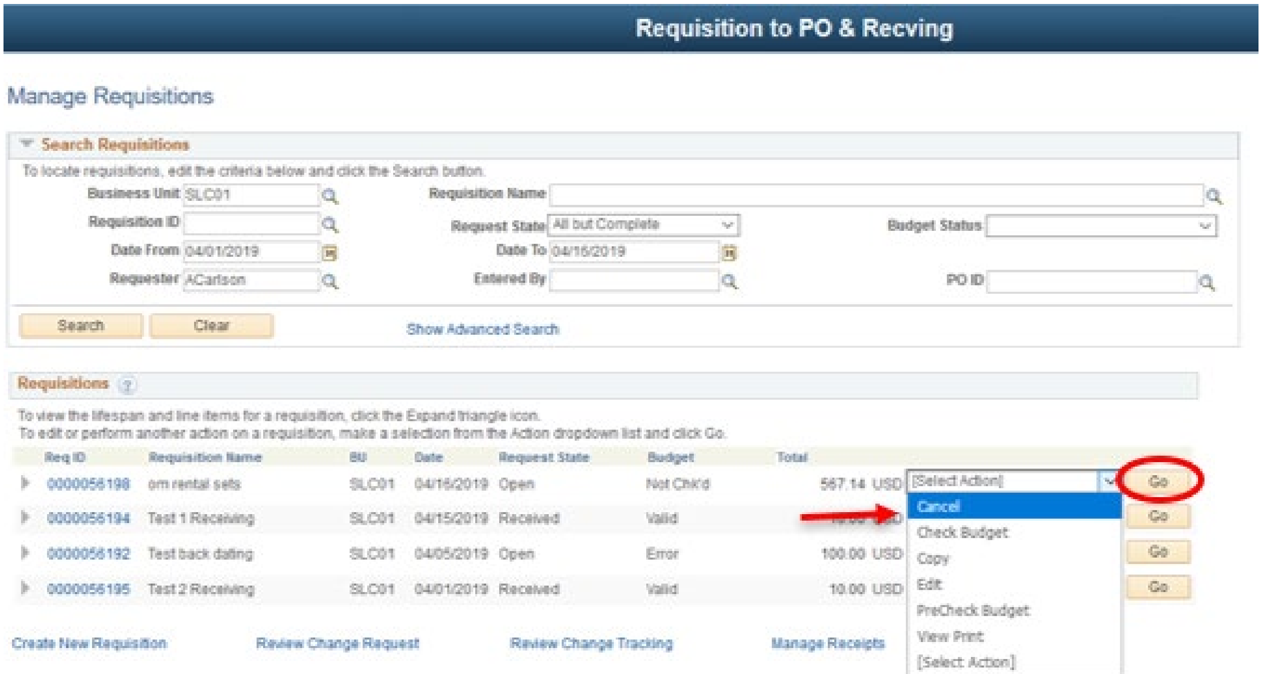
Check to make sure that you have entered a year in the “Bud Ref” field:



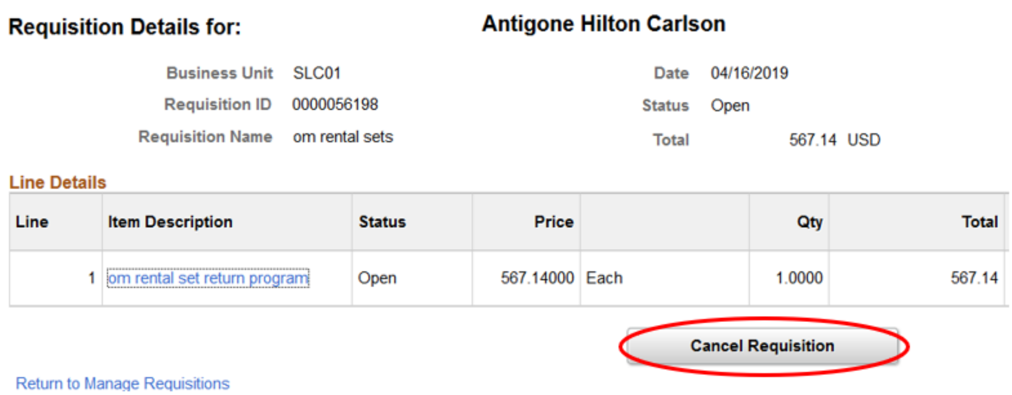
  - If the error is anything else, or you have entered the “Bud Ref” field, you’ll want to:
    1. Double-check your accounting string.
    2. Verify with your Fiscal Manager that there are funds in the accounting string being used.
    3. Contact, [Gabe Anguiano](), in Mayor’s Finance.

REQUISITION - CANCEL

- To cancel your requisition, navigate to the “Manage Requisitions” screen, find your req., and select “Cancel” from the drop-down menu, then click “Go”:

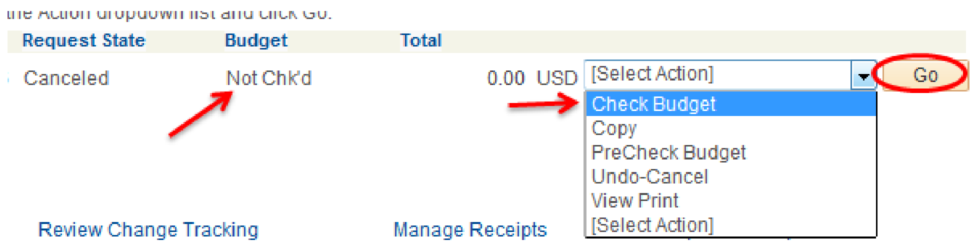


- Then click “Cancel Requisition”:

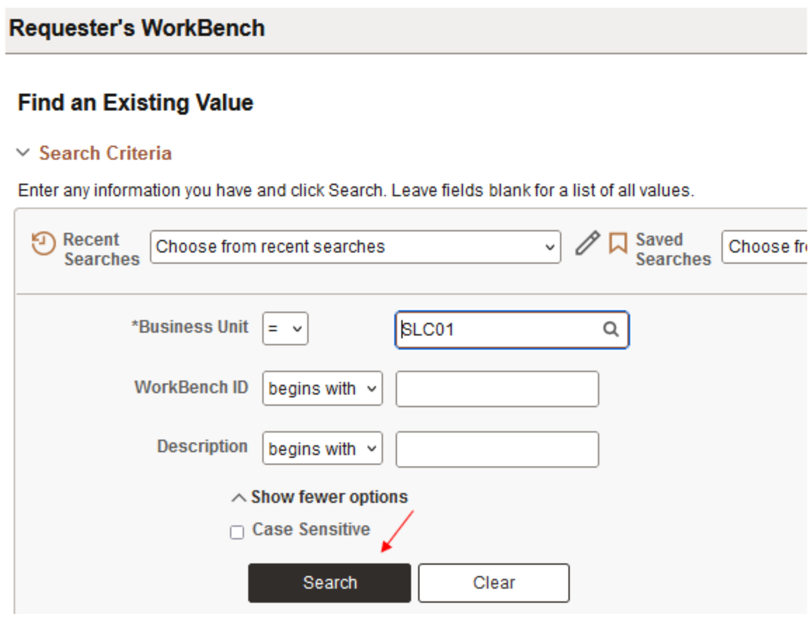


- If the “Budget Status” shows “Valid”, you are done:

- If the “Budget Status” shows “Not Chk’d”, select “Check Budget” from the drop-down menu, then click “Go”:



- If you cannot cancel your requisition because one or more lines have been sourced, you will first need to cancel the PO. Be sure to say "yes" to re-sourcing all reqs. Then you will be able to cancel the requisition using the "Requester's Workbench":
  - Click the "Requester's Workbench" tile on the Purchasing & Accts Payable homepage, and click "Search":



  - Then click "CLOSE" (note: all of the options do the same thing, so you can select any of them):

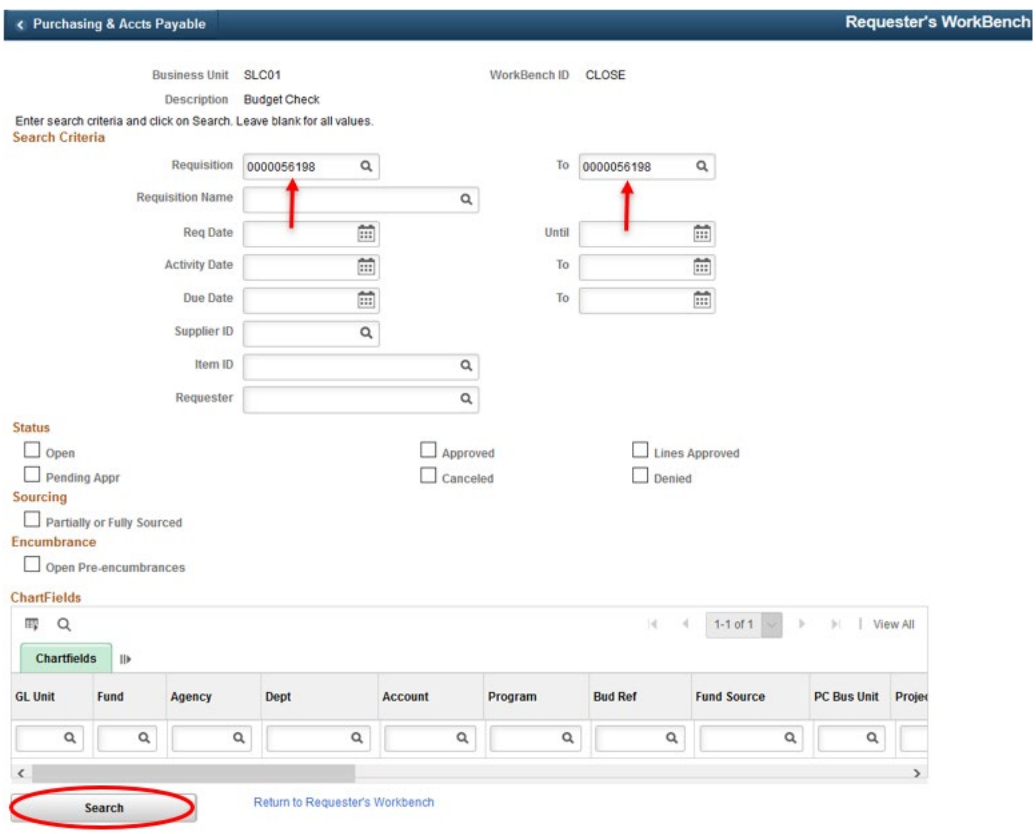
Search Results

20 rows - Business Unit "SLC01"

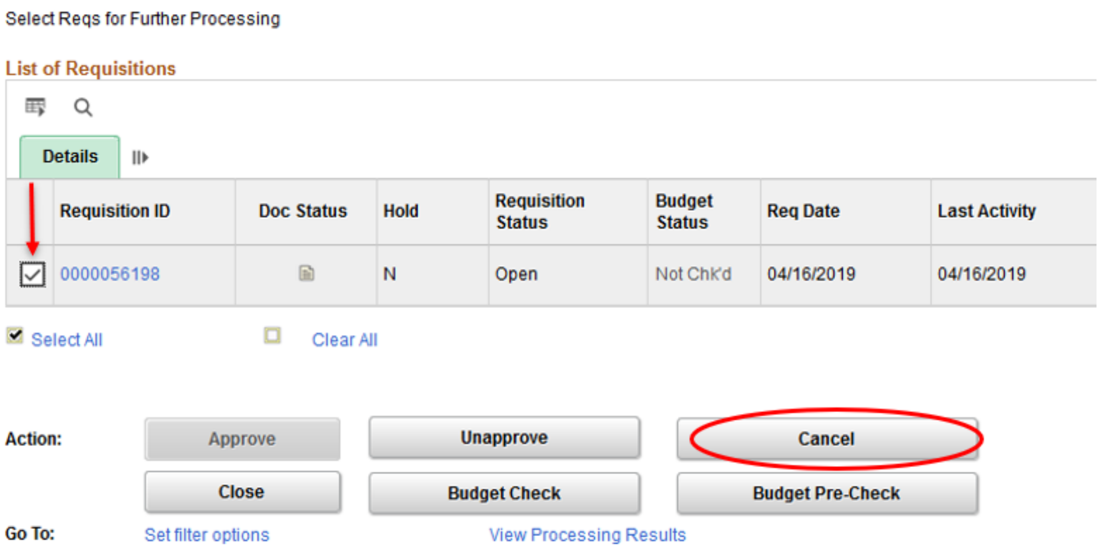
1-10 of 20

Business Unit	WorkBench ID	Description
SLC01	0000040539	Close Req
SLC01	0000043025	Cance; Requisition
SLC01	0000043413	Cancel Requisition
SLC01	AP	Close
SLC01	AV	Close
SLC01	BH	close
SLC01	BUDGET	budget check
SLC01	CLOSE	ist Budget Check

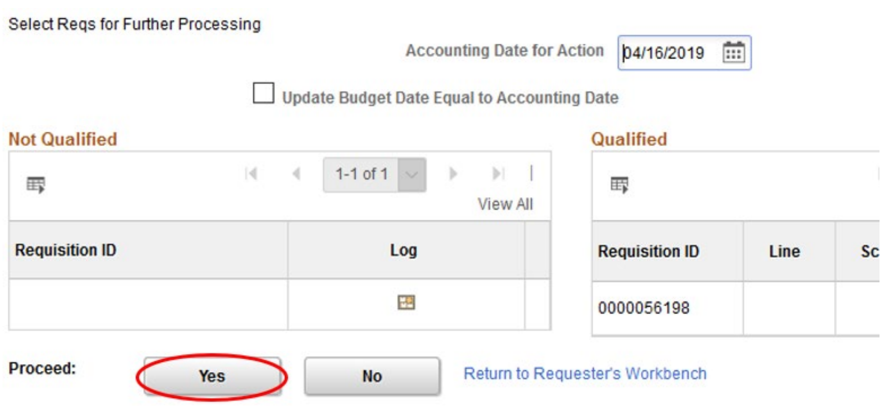
- Enter your requisition number in the “Requisition” and “To” fields, then click “Search”:



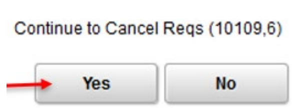
- Next, click the box to select the requisition, then click “Cancel”:



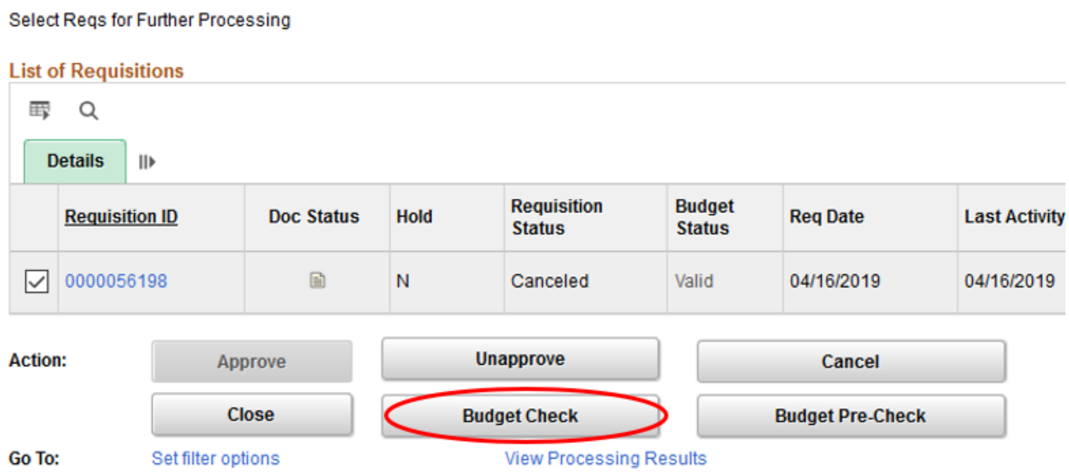
- On the next screen, say "Yes" to proceed:



- Then click "Yes" to continue cancelling the req.:



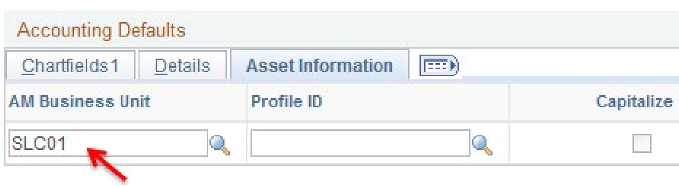
- It will bring you back to the Requester's Workbench and you'll need to click on the "Budget Check" option to free up the funds:



- Then click "Yes" to proceed again, and the req. is cancelled.

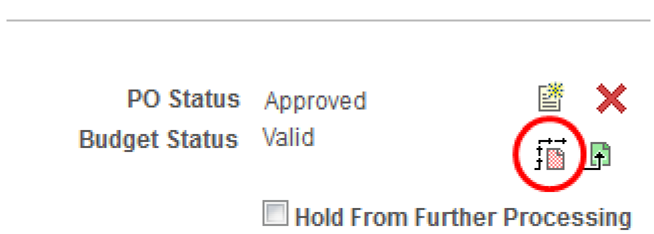
REQUISITION – CAPITAL ASSET

- If you can't seem to get the Capital Asset information working on your requisition, be sure to put "SLC01" in the "AM Business Unit" so that you can see all the possible Capital Asset choices:



REQUISITION – CLEAR OUT/CANCEL PRE-ENCUMBRANCE

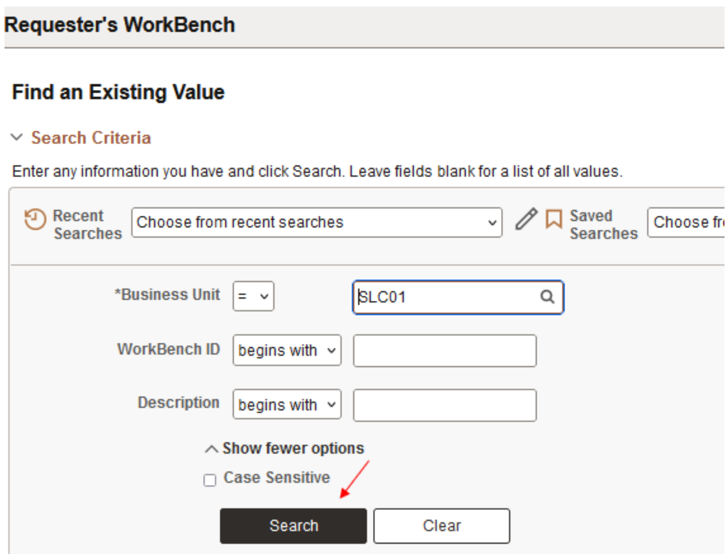
- To clear out lingering pre-encumbrances when you have an active current year PO, you can simply "Finalize" your PO:
  - Go to "Manage Purchase Orders" and open the PO that was sourced from your requisition. In the upper right-hand corner click the "Finalize Document" icon:



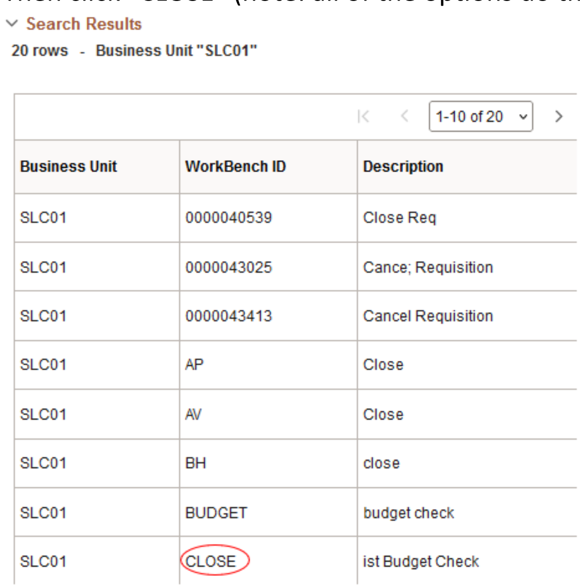
- This action will cause the budget status to revert to “Not Chk’d”; you’ll need to re-check the budget:

- Then you can (re)dispatch the PO and the pre-encumbrance from the requisition will be liquidated.

- To clear out lingering pre-encumbrances when you have a complete PO, you will:
    - Use the Buyer’s Workbench to close the completed PO.
    - Then go to “Requester’s Workbench” tile on the Purchasing & Accts Payable homepage, and click “Search”:



    - Then click “CLOSE” (note: all of the options do the same thing, so you can select any of them):

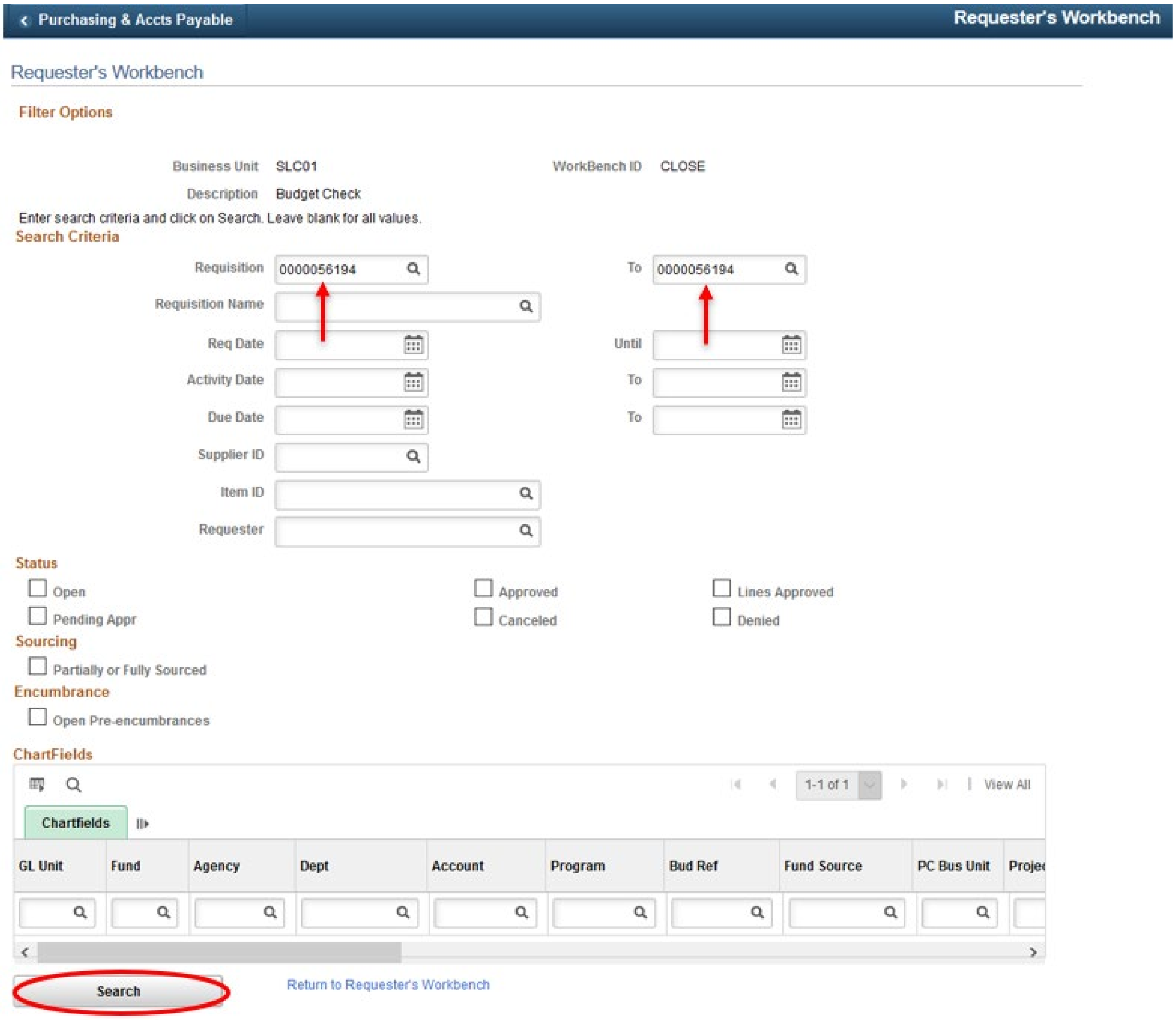

Search Results

20 rows - Business Unit "SLC01"

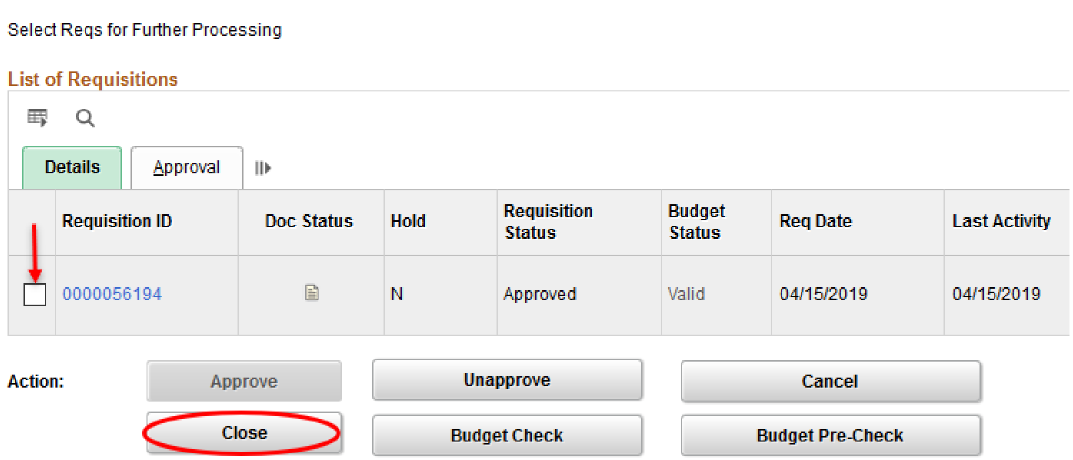
1-10 of 20

Business Unit	WorkBench ID	Description
SLC01	0000040539	Close Req
SLC01	0000043025	Cance; Requisition
SLC01	0000043413	Cancel Requisition
SLC01	AP	Close
SLC01	AV	Close
SLC01	BH	close
SLC01	BUDGET	budget check
SLC01	CLOSE	ist Budget Check

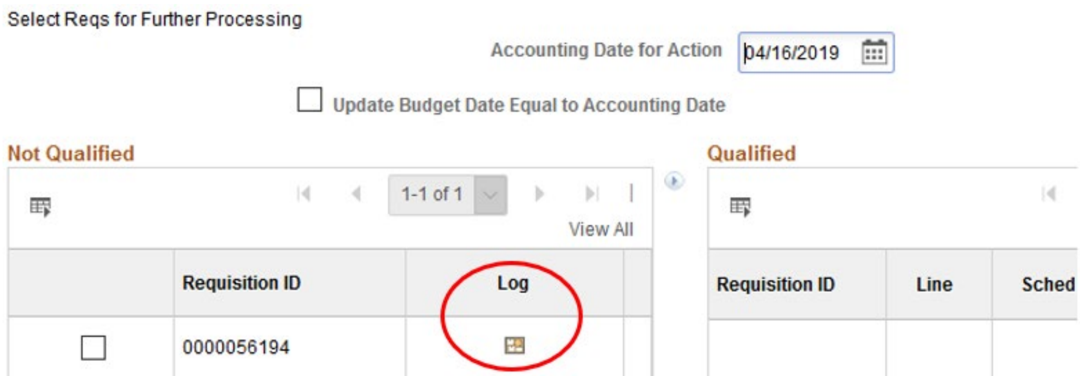
- Enter your requisition number in the “Requisition” and “To” fields, then click “Search”:



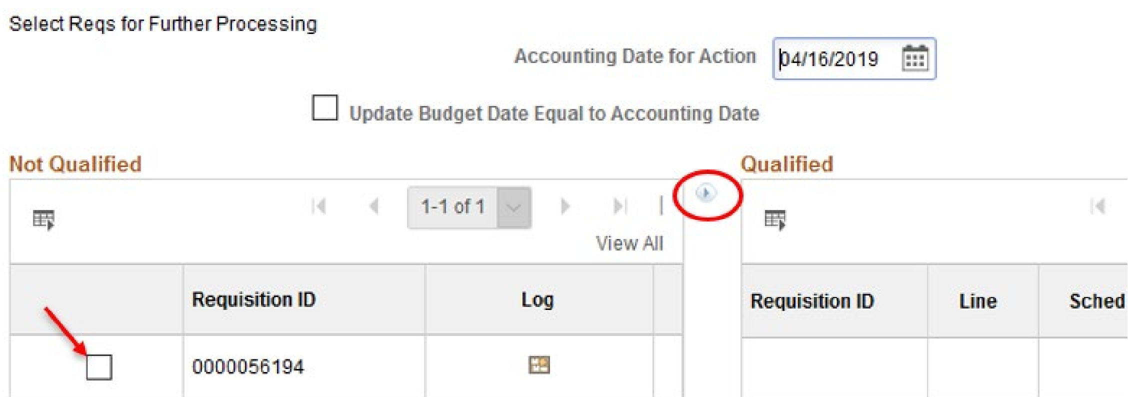
- Next, click the box to select the requisition, then click “Close”:



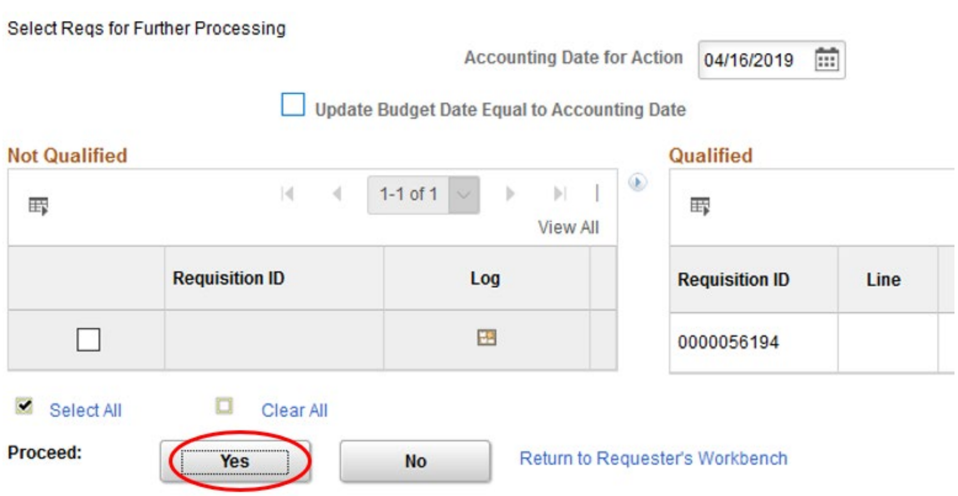
- On the next screen, say “Yes” to proceed if the Req. ID is in the “Qualified” section; if it is “Not Qualified”, as seen below, you can check the “Log” to see why it isn’t qualified:



- If there is a little triangle in between the boxes, you can force the qualification by clicking on the box to the left of the requisition and then clicking on the triangle:

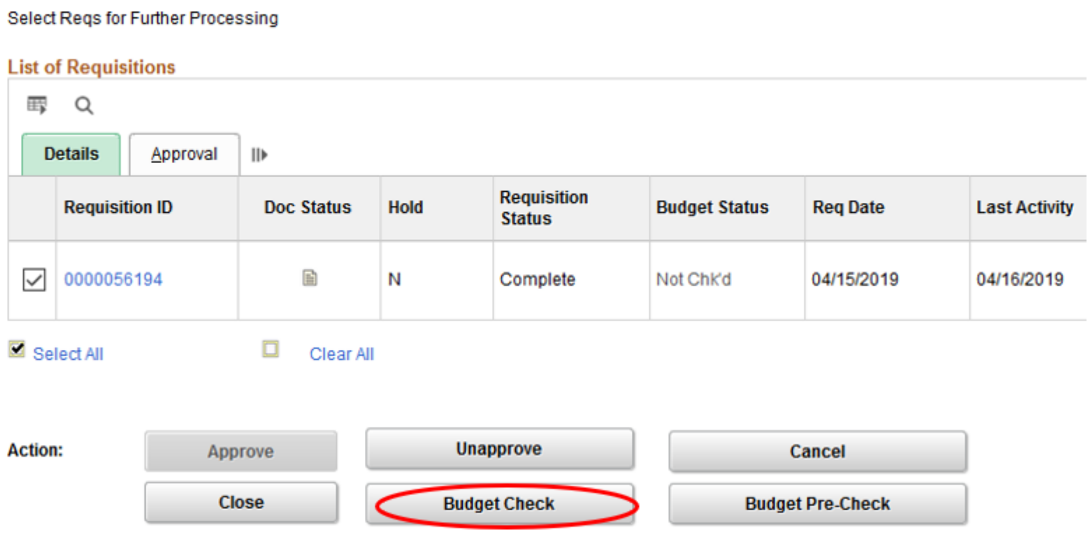


- Once “Qualified” click “Yes” to proceed:



- Then click “Yes” to continue to close the req.:

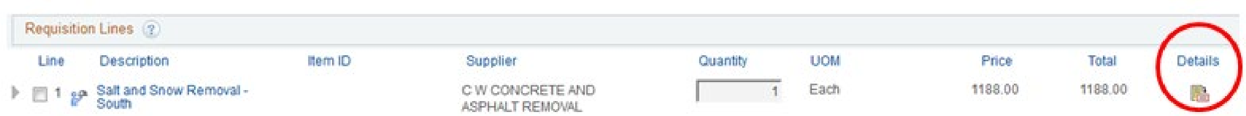
- It will bring you back to the Requester’s Workbench and you’ll need to click on the “Budget Check” option to free up the funds:



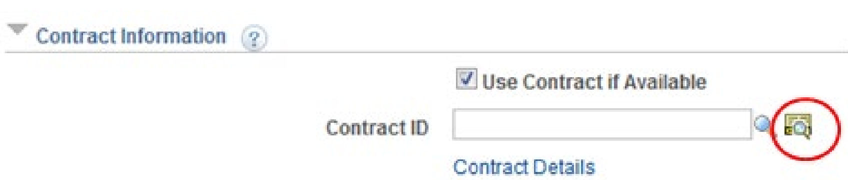
- Then click “Yes” to proceed again, and the req. /pre-encumbrance is closed.

REQUISITION - CONTRACT

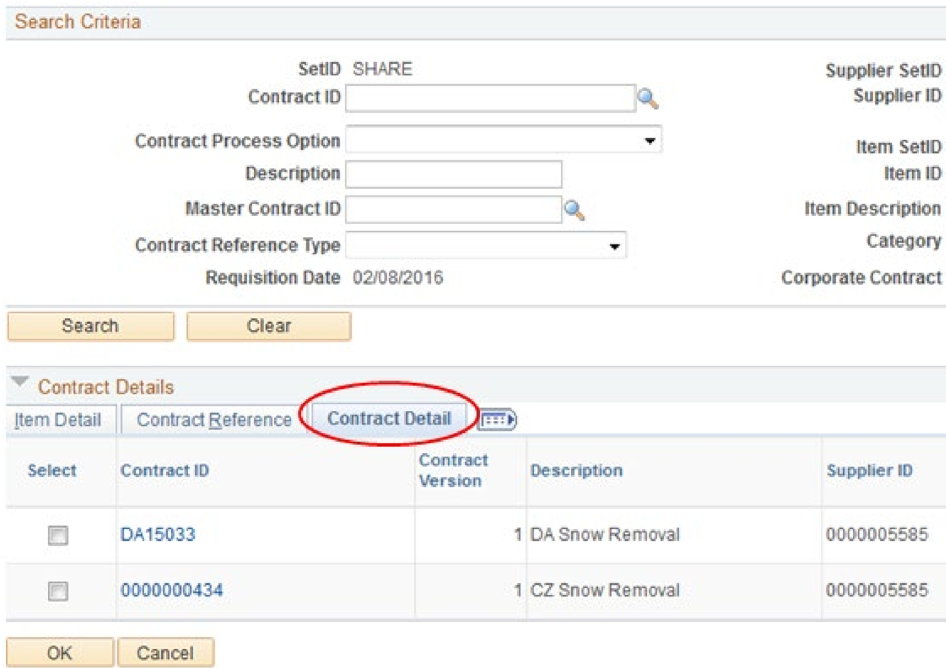
- To make a purchase off of a contract, as you enter your requisition on the “Edit Requisition – Review and Submit” screen click on the “Details” icon:



  - Then, in the “Contract Information” section, click on the contract search icon (second magnifying glass):



- Next click "Search", you don't need to enter any information, it will bring up all contracts with your selected Supplier, if you click on the "Contract Detail" tab you'll be able which agency "owns" the contract or if it is countywide (designated by either CW or CZ) and you can select either your own agency's contract, or a countywide contract:



- The system will then prompt you with the following:

This is an opportunity and a reminder to verify that the contract you want to use covers the items or services you're requesting, and to double check the pricing to make sure it is at or below the contracted rate.

- Then continue with your requisition, the contract will carry forward to the PO.

- If, when attempting to link to a contract, your contract is not coming up as available. There could be one of the following issues:
  - If you are using a different Supplier ID than what is used on the contract (e.g. Dell #0000000065 vs. Dell Marketing LP # 0000002747) it will not be available. Go to the "Supplier Contract Inquiry" tile from the Purchasing & Accts Payable homepage and look up the contract to see which Supplier ID is associated

with the contract you need to use. If it is different than what you have on your requisition, you'll want to correct it on the req.

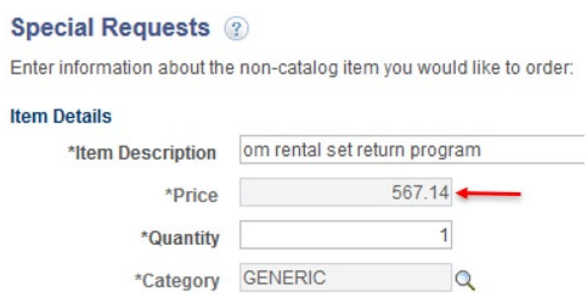
- If the contract has expired it will not be available – you can go to the "Supplier Contract Inquiry" tile from the Purchasing & Accts Payable homepage and look up the contract to verify the expiration date.

- If the contract is not in an approved status (usually we're waiting on the Supplier to sign the contract so we have a fully executed contract) it will not be available; feel free to check with Contracts & Procurement on the status.

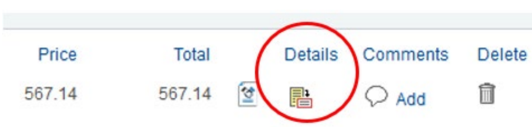
REQUISITION - EDITING

- If you need to edit your requisition but are getting a message that "one or more lines have been sourced", you will first need to cancel the PO associated with your requisition, make sure to say "Yes" to re-source all lines, then you will be able to edit the req. and re-source to a new PO.

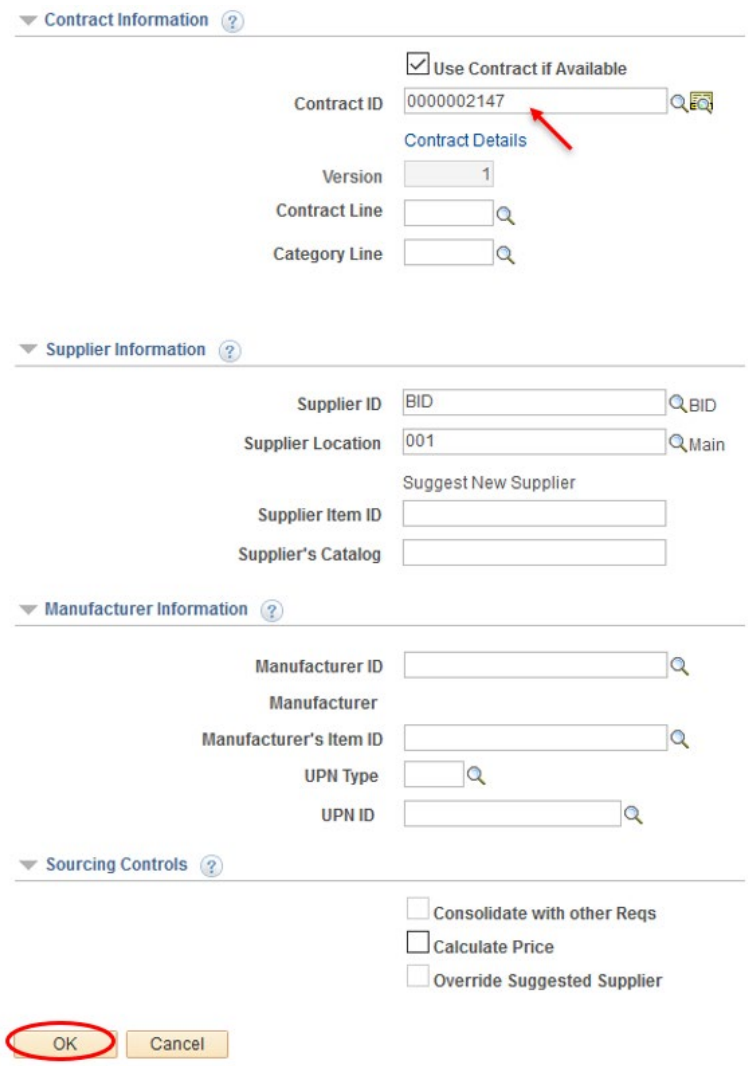
- To change the dollar amount on your requisition when that field is grayed out:



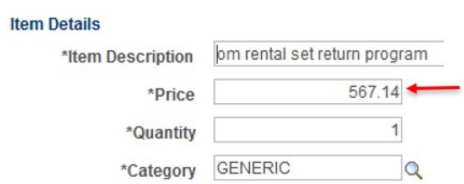
  - You will first need to take out the contract that is linked to the requisition by going to the "Edit Requisition – Review and Submit" or Checkout screen, click on the "Details" icon:



  - Delete out the Contract ID, then click "OK":



- Once the contract is removed, the "Price" field will be available:

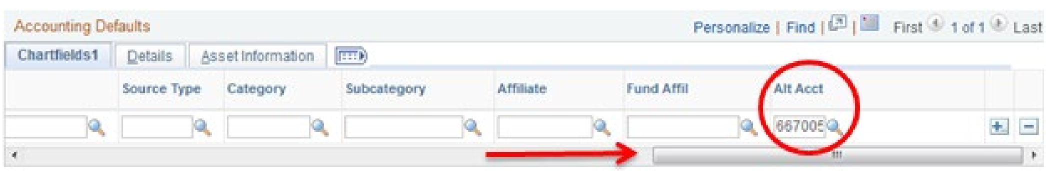


- After making your edits, be sure to add your contract back.

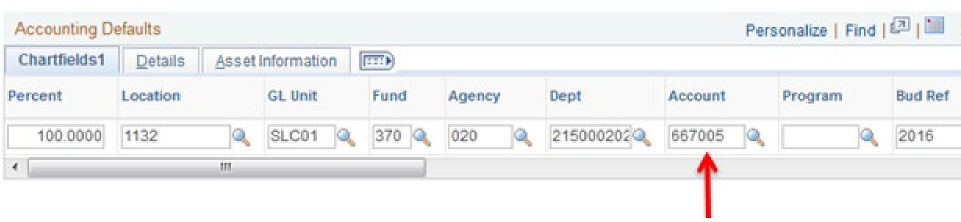
- To change the account on your requisition after it has been saved, from the "Manage Requisitions" screen select "Edit" from the drop-down menu, then click "Go":

- It will bring you to the “Edit Requisition – Review and Submit” screen click on “Requisition Settings”:

- First delete out the “Alt Account” on the very far right of the screen – you must scroll over to see it. Delete out the “Alt Account”, then click “Save for Later”:



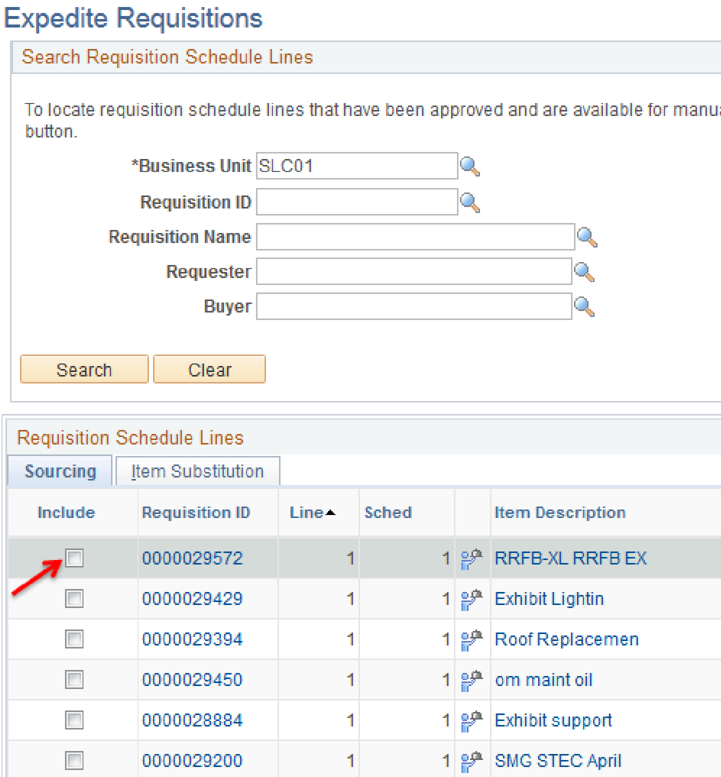
- It will clear out the “Account” field and then you can make your correction:



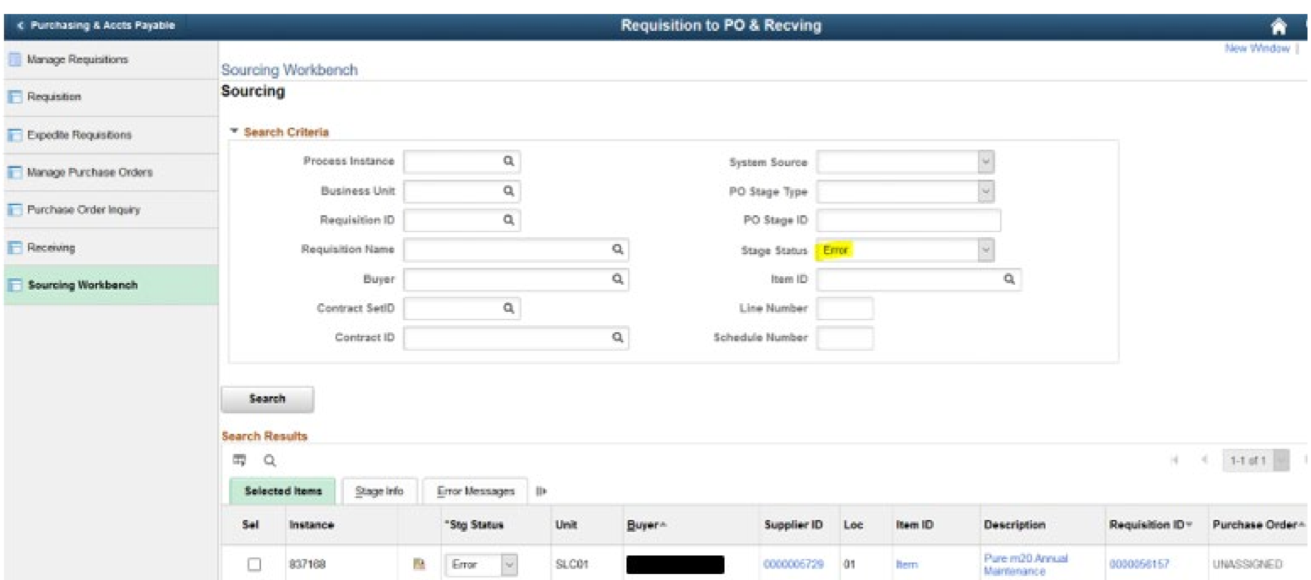
- After making the change, if your requisition was already approved you will need to “Pre-Check Budget” and “Save & Submit” again.

REQUISITION - EXPEDITE

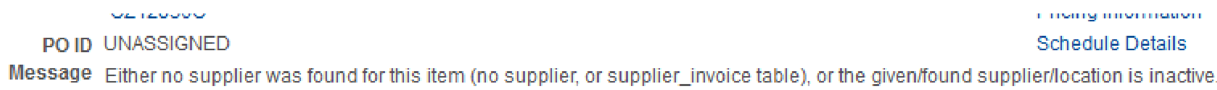
- When expediting requisitions to POs if all the requisitions are checked when you “Submit”, it will lump all of the reqs. from the same Supplier onto one PO. To correct, you will need to cancel the PO, be sure to mark “Yes” to re-sourcing all reqs., and then source each requisition separately by checking one requisition box at a time:



- If you expedite a requisition, but it never shows up in your "Manage Purchase Orders" screen there was an error sourcing the req. You can use the "Sourcing Workbench" to diagnose the problem and move the requisition out of the sourcing tables. Click on the "Sourcing Workbench" option on the left nav./menu when you are in the "Requisition to PO & Receiving" tile from the Purchasing & Accts Payable homepage:
    - Once there, you can select various "State Status" options (most of the time they are under "Error", so that is a good place to start, if you leave this field blank it will take forever to load because all the successes will show up as well):

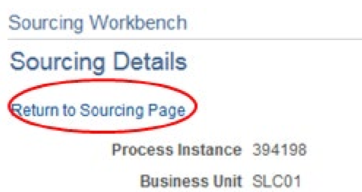


- Next, find your name in the “Buyer” column or requisition and then click on the icon to get the details of the error, for example:

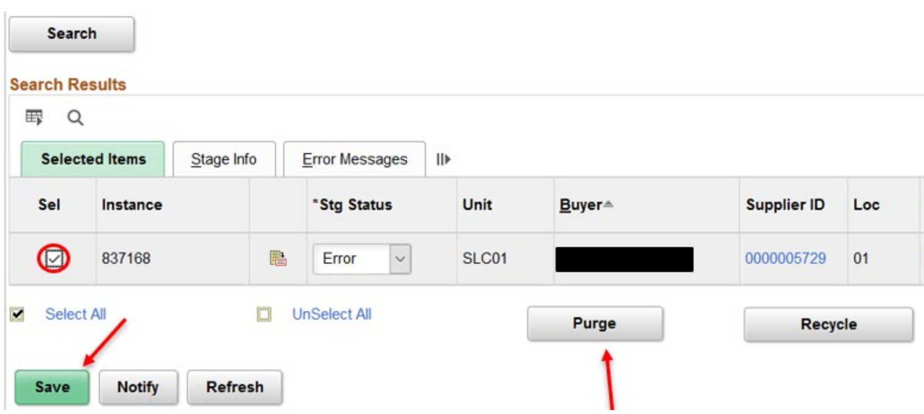


  - This particular error message tells you that the supplier is inactive, get in touch with the [Supplier Team]() in Mayor’s Finance and see when they are going to activate the supplier (any time a change is made to the supplier, it is flipped to unapproved, and must be approved by another set of eyes. The process usually doesn’t take very long)

- Once you know what the error detail is, click “Return to Sourcing Page” toward the top of the screen:



- Then click on the box to the left of the “Instance” number, followed by “Purge”, and finally “Save”:



- This will kick it back to your “Expedite Requisitions” screen and allow you to re-source to a PO once the error is resolved. (Note: If the error is that the contract maximums would be exceeded, please get in touch with [Rachael](), Contracts Administrator, to verify the amounts on the contract and the best way to proceed)

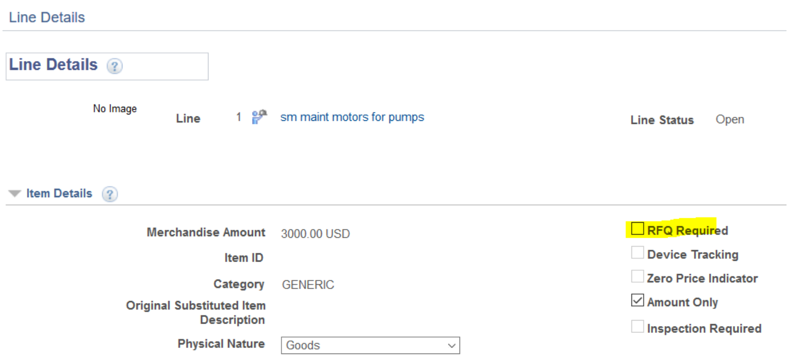
REQUISITION – GOING TO BID or SOLE SOURCE

- When entering a requisition for an RFP solicitation, use "BID" as the supplier and attach your RFP Development Worksheet to the requisition.

- When entering a requisition for and RFB or RFC solicitation, use "BID" as the supplier and attach your RFB/RFC Development Worksheet to the requisition.

- When entering a requisition for a Sole Source purchase, use "CP" (or "BID") as the supplier and attach your Sole Source Request Form to the requisition.

- When entering a requisition for an RFQ (Quote Process), use "BID" as the supplier and attach your quotes to the requisition. NOTE: Do **not** select "RFQ Required" within the Line Details (this will prevent the req. from being sourced to a PO):



REQUISITION - INVOICE

- You will notice that there is not a field to put an invoice number on requisitions; requisitions and POs, are for ordering, not payment of goods. Generally, you will receive the invoice when the goods are received.

- As Accounts Payable is entering in invoice information, the system checks and will not allow duplicate invoice numbers.

REQUISITION – MULTIPLE DISTRIBUTION LINES

- Remember, do NOT use multiple distribution lines to distinguish different invoices; it causes errors in the General Ledger. Keep in mind that you should be using multiple PO *lines* not distribution lines if you are purchasing different items. For example, if you are purchasing computer monitors, keyboards, CPUs, and mice, you should have 4 different lines on the PO for each item, not 1 PO line with 4 distribution lines.
  - Distribution lines can be used when splitting the purchase between multiple budgets for the overall purchase: For example, 60% of the purchase being allocated to you Operations Budget and the other 40% to Equipment/Supplies. Multiple distribution lines should **only be used when only 1 invoice will be**

submitted for payment. If multiple invoices will be submitted use multiple PO lines not distribution lines.

REQUISITION – STATUS DEFINITIONS

Requisition State	Budget State	Means	Next Step
Approved	Prov Valid	It has been approved, needs to be budget checked	Do a budget check then go eProcurement>Buyer Center>Expedite Requisition
Approved	Valid	Ready to expedite into a Purchase Order	Go to eProcurement>Buyer Center>Expedite Requisition
Approved	Not Chk'd	Try to budget check. If you are unable to budget check succesfully and you do not get an error message or successful budget check, the requistion is locked	To unlock, tell Nathan Gubler or Tiggy Carlson the req number and user name, and they can unlock the Source Header
Canceled	Error	Example - Exceeds Budget Tolerance	Contact Gabe Anguiano in Mayor's Finance
Canceled	Not Chk'd	The req has been cancelled, but not budget checked	Do a budget check
Canceled	Valid	The req has been cancelled and budget checked	No action required
Complete	Valid	The requisition is complete: Either the PO is paid out and the PO and req closed, or the req has been cancelled/closed	No action required
Denied	Prov Valid	The req has been denied. You should cancel it to get off of the list	Cancel the req
Open	Prov Valid	The Req has not been submitted for approval	Need to edit the req and then "Submit for Approval"
Open	Error	There is a budget exception with the req	Check to see what the error is by clicking on the link "Error". You then need to act on the error, which could mean talking with the Fiscal Manager to get the right chartfields or ensure that the budget is correct. Once the error is resolved, click "Pre-Check Budget" and then "Save & Submit"
Open	Not Chk'd	You have not done a "Pre-Check" of the budget or submitted for approval	Edit the Req and click "Pre-Check Budget" and then "Save & Submit"
Partially Dispatched	Valid	1. You have cancelled/closed a PO and another PO was created or 2. Multiple line req and only partially expedited to a PO	1. No action required until receiving, if applicable or 2. Cancel the PO and resource or create another PO for the lines that were not sourced
Partially Received	Valid	The PO has not been completely received. You did not the receive the complete order.	When the goods come in, receive the remaining quantity. If the goods do not come in, close the PO (this will relieve the encumbrance)
Pending	Prov Valid	Needs to be approved	Wait for the approval
Pending	Error	The requisition was submitted when a budget was not available, make sure the budget is "Provisionally Valid" before you submit for approval	Check with your Fiscal Manager to get a valid chartfield string to ensure that it has the correct fields. Once you have the budget added or the chartfields is correct, you can click the "Pre-Check Budget" and then hit "Save & Submit", if it is valid
Pending	Not Chk'd	You need to do the "Pre-Check Budget" action	Need to select "Pre-Check Budget" from the drop-down menu

Requisition State	Budget State	Means	Next Step
PO Partially Cancelled	Valid	One of the lines was cancelled on a PO.	If the line was cancelled legitimately, then no action is needed. If the line was cancelled in error, you need to create a new Req for the cancelled line
PO Partially Completed	Valid	1. You have cancelled a PO and another PO was created or 2. Multiple line req and only partially expedited to a PO	1. No action required or 2. Create another PO for the lines that were not sourced
PO Partially Created	Valid	1. You have cancelled a PO and another PO was created or 2. One of the lines was expedited to a PO, the other line(s) was not	1. Work the PO to get it dispatched or 2. If the unsourced line is valid, it needs to be expedited to a PO, otherwise cancel the unsourced line(s)
PO(s) Canceled	Valid	The PO was cancelled	No action required
PO(s) Completed	Valid	The PO has been closed	No action required
PO(s) Completed	Prov Valid	The PO was closed. The req closed , a pre-budget check was done instead of a budget check. The req is looking an approval. We should not pre-budget check a closed requistion. Only budget check	Close the requisition, then budget check using the "Requester's Workbench", Purchasing>Requisitions>Requester's Workbench
PO(s) Created	Valid	The PO was expedited	Work the PO and dispatch it
PO(s) Dispatched	Valid	The PO has been dispatched	No action required until receiving, if applicable
Received	Valid	Items have been fully received	No action required
See Lines	Not Chk'd	There is a negative amount on a line. Make sure that all lines are approved, otherwise the credit will not go through	Edit the req and click "Pre-Check Budget" and then "Save & Submit"
See Lines	Valid	There is a negative amount on a line. Make sure that all lines are approved, otherwise the credit will not go through	Make sure that you expedite all lines
See Lines	Error	You have a budget error with a line that has a credit	Fix the error. "Pre-Check Budget" then "Save & Submit"

REQUISITION – STUCK APPROVAL

- If your requisition seems stuck after it has been approved – the system is acting like the requisition hasn't been approved. The system got hung up in the process of the approvals. You should edit the requisition and make a change to either the price or quantity, click "Save for Later". Then change the price or quantity back to what it was and click "Save & Submit". This will re-initiate the approval process and allow you to move forward.

- If you have multiple lines on your requisition, but only one line is approved the system got hung up in the process of the approvals. You should edit the requisition and make a change to either the price or quantity on each of the stuck lines and click "Save for Later". Then change the price or quantity back to what it was on each line and click "Save & Submit". This will re-initiate the approval process and allow you to move forward with all lines.

REQUISITION – STUCK; CANNOT BUDGET CHECK

- If you cannot budget check your requisition, the system acts like it is performing the action but doesn't, contact Rachael Rigdon, in Contracts & Procurement, to unlock the Source Header; then you should be able to move forward.

SECURITY

- To get a new Requester or Approver set up fill out a "Request for Access to MyFin Purchasing System" form; this is found on Contracts & Procurement's website under "MyFin Forms". Fill it out and have your Division Director sign, then send the form to slco-purchasing@saltlakecounty.gov. Note: Mayor's Finance also has a request form on their site that will need to be filled out and approved by them for access to the General Ledger System (vouchers, customer/supplier info., journals, project costing, etc.).

- If you have already been added as a Requester or Approver, but do not have access to the pages you need or are getting messages that you do not have authorization, contact Contracts & Procurement and they will work with IS to get your access sorted out.

SUPPLIER

- To get access to view Suppliers in MyFin, request the role "SLC_AP_Vendor_Inquiry" from Mayor's Finance.

- To look up a Supplier click on the "Supplier/Customer Inquiry" tile from the Purchasing & Accts Payable homepage.

- If you look up a Supplier and they have two Supplier IDs contact Mayor's Finance, suppliers@saltlakecounty.gov, and they will work with Contracts & Procurement to determine which Supplier ID should be inactivated (if both IDs have active transactions, we will have to wait to inactivate one of them).

- Some Supplier IDs have multiple addresses associated with the one ID, like the University of Utah or State of Utah. Instead of viewing all the addresses on the "Supplier" screen in PeopleSoft, look up all of the addresses for any Supplier ID use the query "SLC_SUPPLIER_ADDRESSES", be sure to use the magnifying glass so the name is exact.

- To get a Supplier added: Send the vendor an invitation in PaymentWorks and once the process is complete their information will be brought into MyFin (this includes no-cost vendors – vendors do not have to enter banking information if they will not be paid by the County).

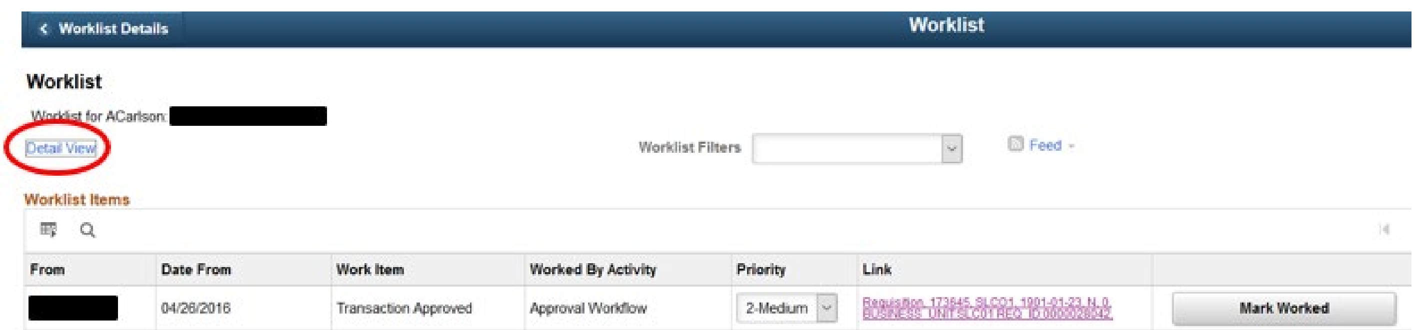
- If you are using a Supplier ID and the system says that it is invalid, the Supplier Team in Mayor's Finance is making or has made a change to the Supplier and it has flipped the supplier from "Approved" to "Unapproved", making it temporarily unavailable to use on requisitions and POs. Tiggy Carlson will look at the change that was made and then approve the change which will activate the Supplier ID. This process usually doesn't take very long, but if you have questions, feel free to contact [Tiggy](#).

TRAINING

- There is a lot of information on the Contracts & Procurement website as far as training materials. The best place to start is the "Quick Reference Guides", which covers all the basic information for various types of requisitions as well as this Troubleshooting Guide.

WORKLIST ISSUE - APPROVALS

- If you find that transactions are not clearing out of your approval worklist, this is caused by a bug in the system, Rachael Rigdon, rrigdon@saltlakecounty.gov, can manually clear these out for you. Send her the Instance ID, and she will mark the transaction "Worked" so that it will not appear on your worklist. To find the Instance ID, navigate to your worklist and click on the "Detail View" hyperlink:



  - Scroll to the far right to find the Instance ID, in this case, it is 121915:

Selected Dttm	Activity Name	Comment	Timed Out	Instance	Transaction
12/03/2018 12:54:36PM	EOAW_ROUTE			121915	121915