Version 25 | Trapeze Enterprise Asset Management

Enterprise Purchasing Migration

Tool Reference Guide

Trade Secret | February 2025

Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone:	1-877-411-8727
E-mail:	cc@trapezegroup.com
FTP Site:	https://ftps.trapezegroup.com/
Web Site:	https://collaborate.trapezegroup.com

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest Product Compatibility information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Enterprise Purchasing Migration Tool - User Guide

February 2025

Contents

1. Overview

The Enterprise Purchasing migration tool was designed to facilitate the Professional Services team when migrating customers from the legacy purchasing system to the Enterprise Purchasing environment.

Important: The Enterprise Purchasing migration tool only supports migrations for inventory managed by location. This tool is designed to stop processing if your inventory is managed centrally and you attempt to perform a migration.

Alert: Migration implemented with this tool is not easily reversed. This is intended to be used for one-way migration. Once the tool has run, you must proceed to Enterprise Purchasing.

Requirements

Alert: It is a requirement for your organization to fully analyze the impact of a conversion prior to using this tool. Allow sufficient time to review existing data to determine where problems may be encountered during data migration, and address those areas before beginning any data migration.

The following is a list of requirements for installing the tool:

- NET 4.5.1
- A running instance of the application that is connected to the database of the same version. For example, the application version 16.0 and a database version 16.0.

Note: The Enterprise Purchasing migration tool can be installed on a server or on a workstation. For most customers, installing and running on a workstation is the best option.

Oracle Specific

- Installed Oracle client including ODAC with connectivity to the database.

MSSQL Specific

- ODBC connection with the same bit (32-bit, 64-bit) as the tool is running.

2. Installation

To install the Enterprise Purchasing migration tool, open the file package you received, and extract the tool into its own directory.

Files and Directories Created by the Tool

The following items are files and directories that the tool creates:

- An archive directory that is maintained by the migration tool.

  Note: Do not alter this directory or its contents (which include several xml files). The only exception to this is restarting an entire migration, for example, on a new database. This is the only reason to delete this directory in its entirety.

- A log directory which contains application error logs. This is created as a sub-directory of the installation directory.
- A process errors log file in the tool run directory (not the log file directory) with errors that are encountered during purchase order processing and migration.

  Note: After the tool is run, you must review the log files to identify errors.

3. Pre-Migration

Analyzing data and mitigating data conditions is an important part of a data migration plan that should be developed prior to running the migration tool. It is strongly recommended to allow sufficient time to analyze existing data to determine where problems may be encountered during data migration and address those areas before starting data migration. This section outlines required pre-migration and data scrubbing steps.

Warning: Do not set up new vendor purchase limits until after migration is complete. New limits could trigger additional validations that prevent successful migration.

Important: Do not set up or change any other limits that might trigger validations until migration is complete.

Required Steps

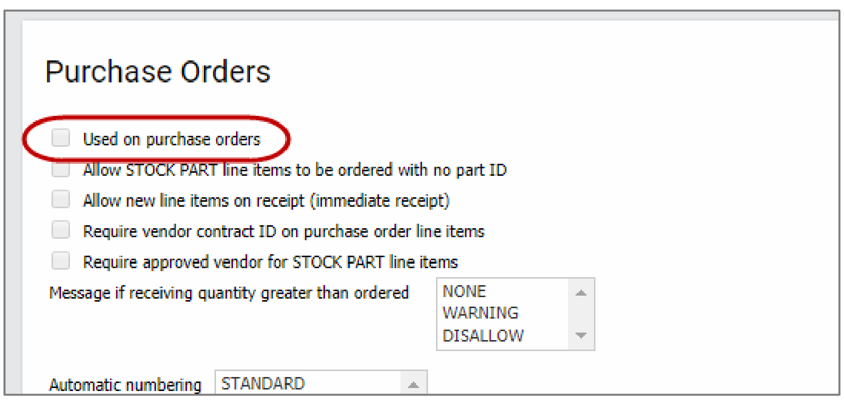
The following process guides you through the steps required to perform the migration.

To perform the migration:

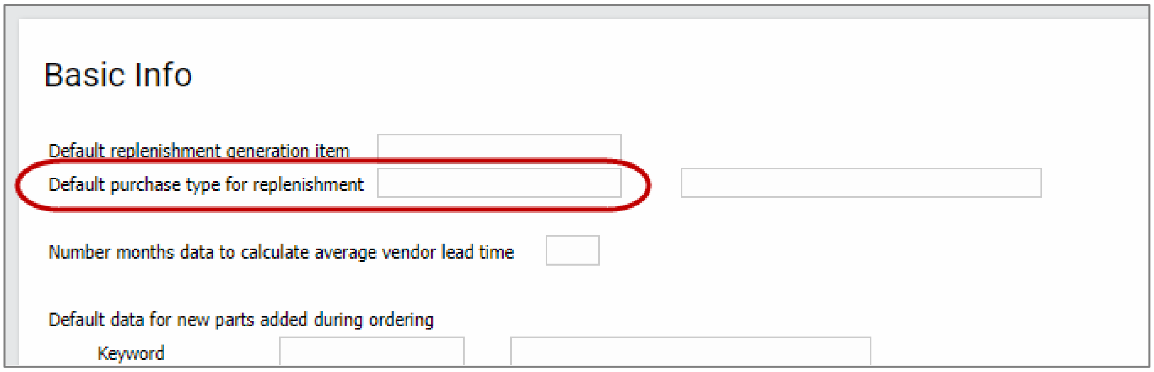
1. Ensure that you have an application user account with full screen rights for all Enterprise Purchasing screens.

2. On the Purchase Types screen, create a purchase type.

   - On the Purchase Orders tab, be sure to check the **Used on purchase orders** checkbox to enable the purchase type to be used on Purchase Orders.

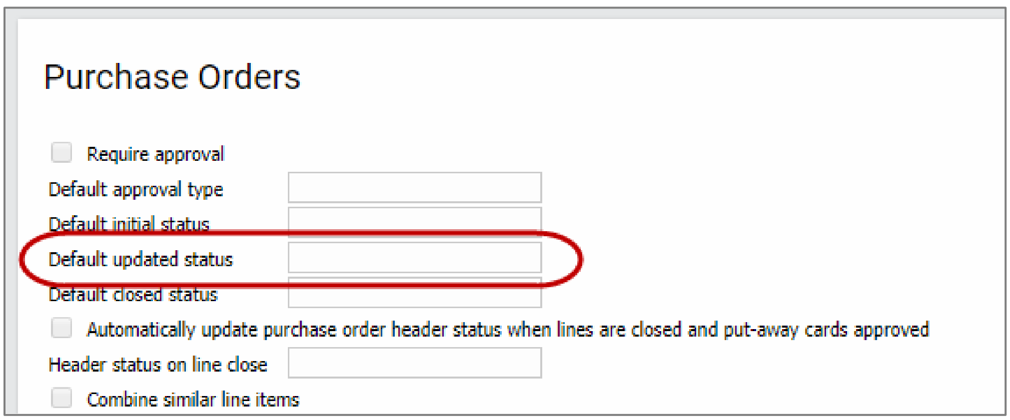


3. On the Enterprise Purchasing – Setup – Options screen, Basic Info tab, select a default purchase type from the **Default purchase type for replenishment** drop-down menu.



4. On the Purchase Orders tab, set the default status for updated purchase orders by selecting a **Default updated status** from the drop-down menu (OPEN or PENDING). This will be the status that the migration sets for updated purchase orders. In the example below, updated purchase orders will be set to a status of OPEN.

   Note: This is required by Enterprise Purchasing.

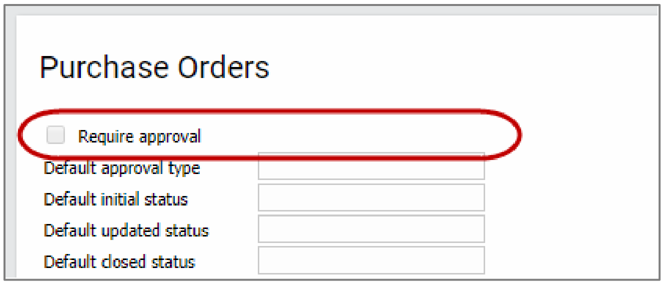


   Note: If the correct status is not available, create the needed status on the Enterprise Purchasing Statuses screen. The status needs to meet the following conditions:

   - Set the **Item state** field to the name of the status.
   - In the **Used on** list, check **Purchase orders**.

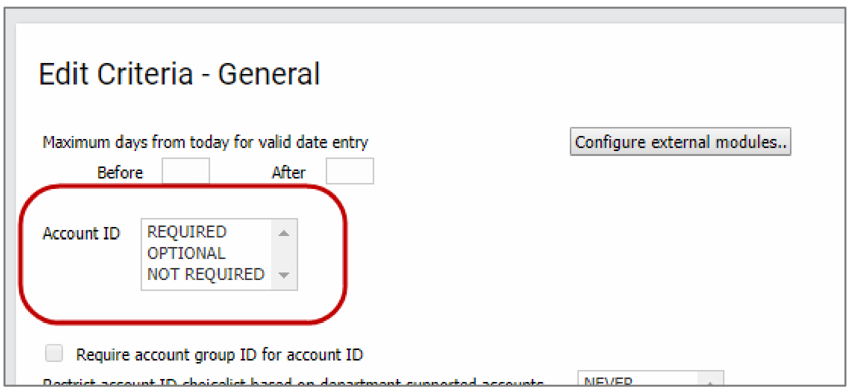
   Note: There should be at least three statuses created that convey a status of pending, open, and closed purchase orders. These can be named to follow any standard needed.

5. Also on the Purchase Orders tab, make sure the **Require approval** checkbox is unchecked.



Note: If approval is required for purchase orders, make a note re-enable after the migration is complete.

6. On the Setup – Options screen (Base Options in the menu), Edit Criteria – General tab, filter for your settings, and check the setting to see if the **Account ID** field is set to **REQUIRED**.



   i. If account ID is not required, continue to the next step.

   ii. If an account ID is required:

      a. Open the Locations Primary Information screen.

      b. On the Inventory – Enterprise tab, set the **Default account ID** field to the account to use on Enterprise Purchasing purchase orders. This account is auto-populated on purchase orders created for that location.

7. On the Locations Primary Information screen, Inventory – Enterprise tab, select a base location in the **Supplied by location ID** field.

   Important: The migration will stop and produce a validation error if you do not perform this step.

8. On the Units of Measure screen, set up Units of Measure (UOM) based on existing purchase data. Include any UOM conversions in the **Conversions between this unit of measure and others** table on this screen.

   Note: This is the new way to do purchase issue factors in Enterprise Purchasing.

9. On the Parts – Setup – Options screen, Messaging tab, uncheck the **Message when part order price out of range from previous order price** checkbox to turn off part price deviation messaging.

   Important: If deviation messaging is enabled, the migration tool will stop the migration if any part prices deviate too much.

   Note: If this selection was previously checked, make a note re-enable after the migration is complete.

Data Scrubbing

This section gives examples of data scrubbing that may be required to handle legacy data conditions, and mitigate problems that may be encountered during migration. This list is not intended to be all inclusive.

Close as Many Open Purchase Orders as Possible

Prior to running the Enterprise Purchasing migration tool for the first time, it is best to have as many purchase orders closed as possible. This means closing all line items on purchase orders received, and running the end of period (EOP) Purge Obsolete Database Entries.

To run the EOP purge:

1. Open the End of Period screen.
2. Click **Reload** or run the search of the end of period information.
3. Click **Edit**.
4. Check the **Purge obsolete database entries** checkbox.
5. Click **Save**.

   This purges all obsolete database entries.

Important: Please note that the EOP Purge Obsolete Database Entries does not close Enterprise purchase orders. Enterprise purchase orders must be manually changed to closed status.

To help close as many POs as possible, set the **Closing purchase orders** setting to **1** on the Table Management screen to retain purchase orders for only one day after closing.

To set the retention on purchase orders:

1. Open the Table Management screen.
2. Search for the table management information.

3. On the Options tab, set the **Closing purchase orders** option to 1.

4. Click **Save**.

⚠ Important: After the migration is complete, change this setting back to its original setting.

Check for NULL Price Types

Use this query to check for NULL price types used on open purchase order line items.

Oracle – SQL

```
SELECT
    PO_PO_NO,
    LINE_NO,
    NVL( PRT_PRICE_TYPE, 'NULL' ) "PRICE TYPE"
FROM
    PO_LINE
WHERE
    STATUS = 'OPEN'
AND PRT_PRICE_TYPE IS NULL;
```

SQL Server – SQL

```
SELECT
    PO_PO_NO,
    LINE_NO,
    ISNULL( PRT_PRICE_TYPE, 'NULL' ) "PRICE TYPE"
FROM
    PO_LINE
WHERE
    STATUS = 'OPEN'
AND PRT_PRICE_TYPE IS NULL;
```

To set a price type:

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Line Items tab, find the line item that needs the fixed price type.
5. Edit the **Price type** field.
6. Click **Save**.

7. If running this cleanup after migration has occurred, run the migration tool again.

Check for NULL or Mismatched Product Categories

Use this query to check for NULL or mismatched product categories on open purchase order line items.

Oracle – SQL

```
SELECT
    POL.PO_PO_NO,
    POL.LINE_NO,
    POL.PART_PART_NO,
    POL.PART_SUFFIX,
    NVL( POL.PRD_PRODUCT_CATEGORY, 'NULL' ) "INCORRECT PROD CAT",
    PTM.PRD_PRODUCT_CATEGORY "CORRECT PROD CAT"
FROM
    PO_LINE POL
JOIN PTS_MAIN PTM
ON
    POL.PART_PART_NO                          = PTM.PART_PART_NO
AND POL.PART_SUFFIX                           = PTM.PART_SUFFIX
AND NVL( POL.PRD_PRODUCT_CATEGORY, 'NULL' ) <> PTM.PRD_PRODUCT_CATEGORY
AND POL.STATUS                                = 'OPEN';
```

SQL Server – SQL

```
SELECT
    POL.PO_PO_NO,
    POL.LINE_NO,
    POL.PART_PART_NO,
    POL.PART_SUFFIX,
    ISNULL( POL.PRD_PRODUCT_CATEGORY, 'NULL' ) "INCORRECT PROD CAT",
    PTM.PRD_PRODUCT_CATEGORY "CORRECT PROD CAT"
FROM
    PO_LINE POL
JOIN PTS_MAIN PTM
ON
    POL.PART_PART_NO                          = PTM.PART_PART_NO
AND POL.PART_SUFFIX                           = PTM.PART_SUFFIX
AND ISNULL( POL.PRD_PRODUCT_CATEGORY, 'NULL' ) <> PTM.PRD_PRODUCT_CATEGORY
AND POL.STATUS                                = 'OPEN';
```

Cleanup for Bad Product Categories

Choose either Option A or Option B below for this section.

Option A: Database Cleanup

The following script has been verified to help clean up bad product categories. Note that if the Parts – Primary Information screen has a product category set to '--', regardless of what is in the line item on the Parts Order Management screen, it will be replaced with the new product category. Make sure this is an acceptable product category to set for the purchase orders you are working with.

To cleanup bad product categories:

Oracle – SQL

```
UPDATE
    PO_LINE
SET
    PO_LINE.PRD_PRODUCT_CATEGORY =
    (
        SELECT
            PTM.PRD_PRODUCT_CATEGORY
        FROM
            PTS_MAIN PTM
        WHERE
            PO_LINE.PART_PART_NO                        = PTM.PART_PART_NO
        AND PO_LINE.PART_SUFFIX                         = PTM.PART_SUFFIX
        AND NVL( PO_LINE.PRD_PRODUCT_CATEGORY, 'NULL' ) <>
PTM.PRD_PRODUCT_CATEGORY
        AND PO_LINE.STATUS                              = 'OPEN'
    )
WHERE
    EXISTS
    (
        SELECT
            PTM.PRD_PRODUCT_CATEGORY
        FROM
            PTS_MAIN PTM
        WHERE
            PO_LINE.PART_PART_NO                         = PTM.PART_PART_NO
        AND PO_LINE.PART_SUFFIX                          = PTM.PART_SUFFIX
        AND NVL( PO_LINE.PRD_PRODUCT_CATEGORY, 'NULL' ) <>
PTM.PRD_PRODUCT_CATEGORY
        AND PO_LINE.STATUS                               = 'OPEN'
```

```
    );

COMMIT;
```

SQL Server – SQL

```
UPDATE
    PO_LINE
SET
    PO_LINE.PRD_PRODUCT_CATEGORY =
    (
        SELECT
            PTM.PRD_PRODUCT_CATEGORY
        FROM
            PTS_MAIN PTM
        WHERE
            PO_LINE.PART_PART_NO                          = PTM.PART_PART_NO
        AND PO_LINE.PART_SUFFIX                           = PTM.PART_SUFFIX
        AND ISNULL( PO_LINE.PRD_PRODUCT_CATEGORY, 'NULL' ) <>
PTM.PRD_PRODUCT_CATEGORY
        AND PO_LINE.STATUS                                = 'OPEN'
    )
WHERE
    EXISTS
    (
        SELECT
            PTM.PRD_PRODUCT_CATEGORY
        FROM
            PTS_MAIN PTM
        WHERE
            PO_LINE.PART_PART_NO                          = PTM.PART_PART_NO
        AND PO_LINE.PART_SUFFIX                           = PTM.PART_SUFFIX
        AND ISNULL( PO_LINE.PRD_PRODUCT_CATEGORY, 'NULL' ) <>
PTM.PRD_PRODUCT_CATEGORY
        AND PO_LINE.STATUS                                = 'OPEN'
    );
```

Option B: Manual Cleanup

To set the product category for the affected lines:

1. Open the Parts Order Management screen.

1. Search for the correct purchase order.

2. Click **Edit**.

3. On the Line Items tab, find the correct line that needs the product category fixed.
4. Edit the **Product category ID** field.
5. Click **Save**.
6. If running this cleanup after migration has occurred, run the migration tool again.

Check for Inactive Vendor IDs

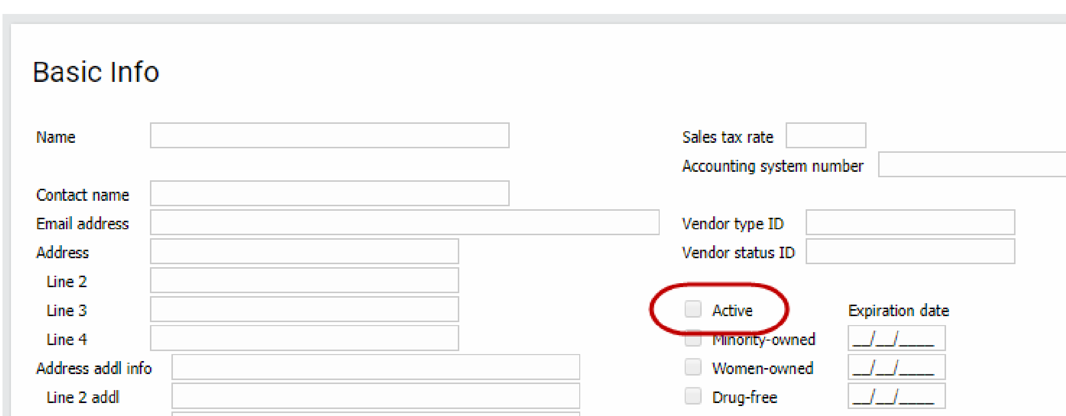
Use this query to check for inactive vendor IDs that are used on open purchase orders.

Oracle and SQL Server – SQL

```
SELECT DISTINCT
    POM.VEND_VENDOR_NO
FROM
    PO_MAIN POM
JOIN VEN_MAIN VM
ON
    POM.VEND_VENDOR_NO = VM.VEND_VENDOR_NO
WHERE
    VM.IS_ACTIVE        = 'N'
AND POM.ORDER_STATUS <> 'CLOSED'
ORDER BY
    POM.VEND_VENDOR_NO;
```

To update the vendor ID:

1. Open the Vendors – Primary Information Screen.
2. Search for the vendor ID.
3. Click **Edit**.
4. On the Basic Info tab, check the **Active** checkbox.



5. Click **Save**.
6. If running this cleanup after migration has occurred, run the migration tool again.

Find Mismatched Vendor ID and Vendor Contract ID

Use this query to find vendor IDs that are matched incorrectly to vendor contract IDs.

To use this query:

1. Run one of the below queries depending on the system:

   Oracle – SQL

```
SELECT DISTINCT
    POWO.PO_PO_NO,
    PM.VEND_VENDOR_NO,
    POL.BPO_BPO_NO
FROM
    PO_LINE POL,
    PO_WORK_ORDER POWO,
    PO_MAIN PM
WHERE
    POL.PO_PO_NO       = POWO.PO_PO_NO
AND POL.LINE_NO       = POWO.ORDER_LINE_NO
AND PM.PO_PO_NO       = POL.PO_PO_NO
AND POL.BPO_BPO_NO IS NOT NULL
AND PM.VEND_VENDOR_NO
    || POL.BPO_BPO_NO NOT IN
    (
        SELECT
            BPOM.VEND_VENDOR_NO
            || BPOM. BPO_BPO_NO
        FROM
            BPO_MAIN BPOM
    )
AND PM.ORDER_STATUS = 'OPEN'
ORDER BY
    POWO.PO_PO_NO,
    PM.VEND_VENDOR_NO DESC;
```

SQL Server – SQL

```
SELECT DISTINCT
    POWO.PO_PO_NO,
    PM.VEND_VENDOR_NO,
    POL.BPO_BPO_NO
FROM
    PO_LINE POL,
    PO_WORK_ORDER POWO,
    PO_MAIN PM
WHERE
    POL.PO_PO_NO       = POWO.PO_PO_NO
AND POL.LINE_NO      = POWO.ORDER_LINE_NO
AND PM.PO_PO_NO      = POL.PO_PO_NO
AND POL.BPO_BPO_NO IS NOT NULL
AND PM.VEND_VENDOR_NO + POL.BPO_BPO_NO NOT IN
    (
        SELECT
            BPOM.VEND_VENDOR_NO + BPOM. BPO_BPO_NO
        FROM
            BPO_MAIN BPOM
    )
AND PM.ORDER_STATUS = 'OPEN'
ORDER BY
    POWO.PO_PO_NO,
    PM.VEND_VENDOR_NO DESC;
```

2. Decide how you want to assign vendor IDs.

Database Cleanup

Oracle – SQL

```
UPDATE
    PO_MAIN
SET
    VEND_VENDOR_NO = 'AppropriateVendorIDHere'
WHERE
    PO_PO_NO = 'PONumberHereFromFirstQuery';
COMMIT;
```

For example:

```
UPDATE
    PO_MAIN
```

```
SET
    VEND_VENDOR_NO = 'VENDORNAME'
WHERE
    PO_PO_NO = '1234L-2016-0005678';
COMMIT;
```

SQL Server – SQL

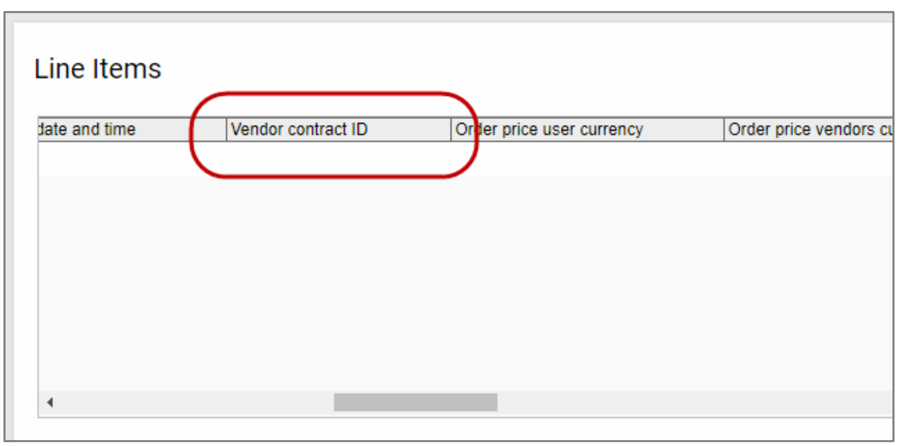
```
UPDATE
    PO_MAIN
SET
    VEND_VENDOR_NO = 'AppropriateVendorIDHere'
WHERE
    PO_PO_NO = 'PONumberHereFromFirstQuery';
```

For example:

```
UPDATE
    PO_MAIN
SET
    VEND_VENDOR_NO = 'VENDORNAME'
WHERE
    PO_PO_NO = '1234L-2016-0005678';
```

Manual Cleanup

1. Open the **Parts Order Management** screen
2. Find the purchase order with the mismatched data
3. Update the vendor contract ID on the line item.



Identify NULL Vendor Contract IDs

Identify any purchase orders with a NULL vendor contract ID and update to include a vendor contract ID.

Run the following query for identifying NULL vendor contract IDs:

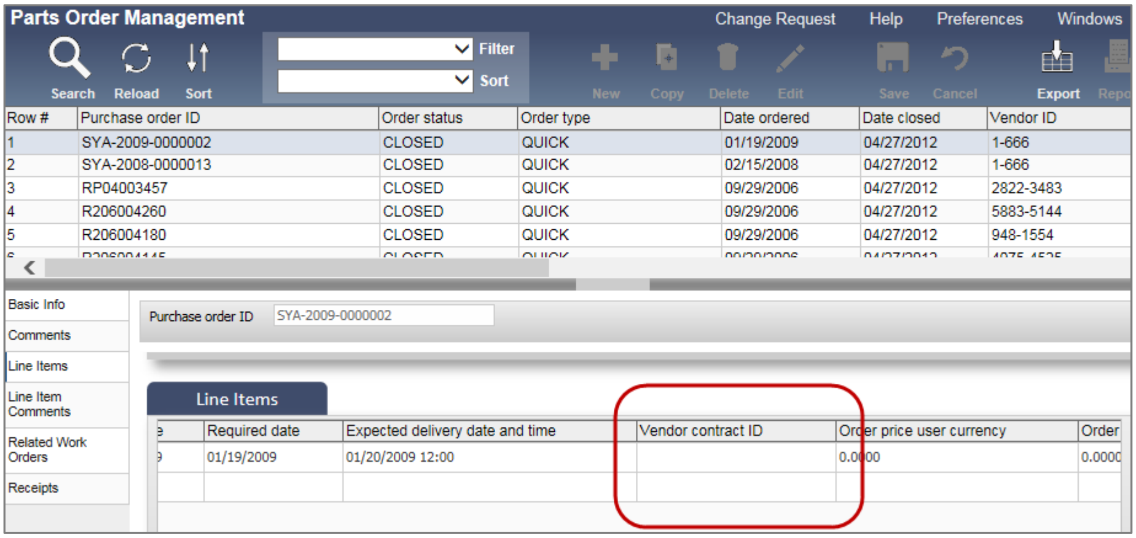
Database Cleanup

Oracle and SQL Server – SQL

```
SELECT DISTINCT
    POWO.PO_PO_NO,
    PM.VEND_VENDOR_NO,
    POL.BPO_BPO_NO,
    POL.LINE_NO
FROM
    PO_LINE POL,
    PO_WORK_ORDER POWO,
    PO_MAIN PM
WHERE
    POL.PO_PO_NO      = POWO.PO_PO_NO
AND POL.LINE_NO      = POWO.ORDER_LINE_NO
AND PM.PO_PO_NO      = POL.PO_PO_NO
AND POL.BPO_BPO_NO IS NULL
ORDER BY
    POWO.PO_PO_NO,
    PM.VEND_VENDOR_NO DESC;
```

Manual Cleanup

1. Navigate to the **Parts Order Management** screen
2. Find the purchase order with the mismatched data
3. Update the vendor contract ID on the line item.



Check for Zero Unit Price

Use this query to check for zero unit price on open purchase order line items. These could be items entered that were free of charge, but Enterprise Purchasing does not allow a zero unit price (however, line items can have a 100% discount).

Option A

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Line Items tab, find the line item that needs the fixed price type.
5. To update the **Order price user currency** field, edit the **Order price vendors currency** field to .01.
6. Click **Save**.
7. If this is being done after the migration tool had been run, re-run the migration tool again.

Option B

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Line Items tab, find the line item that needs the unit price fixed.
5. To enter the actual current unit price on the part, edit the **Order price vendors currency** field on the old purchase order.
6. Run the migration tool.
7. After the migration is complete, enter a 100% discount in the **Discount Percentage** field on the **Enterprise Purchasing – Purchase Order** screen.

Option C

1. Run one of the queries below:

   Oracle – SQL

   ```
   UPDATE
       PO_LINE
   SET
       ORDER_UNIT_PRICE = 0.01
   WHERE
       ORDER_UNIT_PRICE = 0;
   COMMIT;
   ```

   SQL Server – SQL

   ```
   UPDATE
       PO_LINE
   SET
       ORDER_UNIT_PRICE = 0.01
   WHERE
       ORDER_UNIT_PRICE = 0;
   ```

2. Run the **00parts.sql**. This file is located where the application is installed:
   - AppServer > dbobjects > conv
3. If this is being done after the migration tool had been run, re-run the migration tool again.

Check for NULL Related Work Order Task Codes

Note: If this is not performed, migration will stop when new purchase orders are created with a validation error. On related work orders, no task code was allowed before, however, in Enterprise Purchasing it is required for proper tracking.

Use this query to check for NULL related work order (WO) task codes used on open purchase order line items.

The following query locates legacy purchasing PO lines that have related work orders but have no task code on the related work orders tab. Run the query, then fix the PO or line items that result from this query.

Oracle and SQL Server – SQL

```
SELECT
    POL.PO_PO_NO,
    POL.LINE_NO,
    POL.STATUS,
    POWO.LOC_WORK_ORDER_LOC,
    POWO.WORK_ORDER_YR,
    POWO.WORK_ORDER_NO,
    POWO.TASK_TASK_CODE
FROM
    PO_LINE POL
JOIN PO_WORK_ORDER POWO
ON
    POL.PO_PO_NO   = POWO.PO_PO_NO
AND POL.LINE_NO = ORDER_LINE_NO
WHERE
    POL.STATUS             = 'OPEN'
AND POWO.TASK_TASK_CODE IS NULL
AND POWO.CURRENT_VERSION = 'Y';
```

After running the query, use the Parts Order Management screen to add a task code on the Related Work Orders tab to each line that was found in the query above.

To add a task code:

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Related Work Orders tab, find line items that found in the query.

5. Add the task code to the **Task ID** field.
6. Continue adding the task codes to the found purchase order lines above until complete.
7. Click **Save**.

Check for NULL Address IDs

Use this query to check for NULL address IDs used on open purchase order line items.

Oracle – SQL

```
SELECT
   PO_PO_NO,
   NVL( ADR_ADDRESS_CODE, 'NULL' ) "ADDRESS CODE"
FROM
   PO_MAIN
WHERE
   ADR_ADDRESS_CODE IS NULL;
```

SQL Server – SQL

```
SELECT
   PO_PO_NO,
   ISNULL( ADR_ADDRESS_CODE, 'NULL' ) "ADDRESS CODE"
FROM
   PO_MAIN
WHERE
   ADR_ADDRESS_CODE IS NULL;
```

To update the address ID:

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Basic Info tab, update the Address ID.
5. Edit the **Product category ID** field.
6. Click **Save**.
7. If running this cleanup after migration has occurred, run the migration tool again.

Identify the Items that can Cause a PR-ERR 327

Use this query to help identify the items that can cause this error. For more information on the error itself, refer to the Order line item causes negative quantity or value on order section.

1. Run **Find items that cause a PR-ERR 327.sql** to find items that cause a PR-ERR 327.

   This creates an information table for items that are causing a PE-ERR 327. For this process, this table will be referred to as the PR-ERR 327 table.

2. Use the query below to pull and review information from the table that was created by the script in the first step:

   Oracle and SQL Server – SQL

   ```
   SELECT
       ORDER_UNIT_PRICE,
       ORDER_PRICE_FOREIGN,
       NET_UNIT_PRICE,
       NET_PRICE_FOREIGN,
       PO_PO_NO,
       LINE_NO
   FROM
       PO_LINE_PLO_MAIN_WORKTABLE
   WHERE
       ACTION = 'Review';
   ```

3. Using the information from the query, populate the below script with the problematic line information for the lines that are causing the failure:

   Note: To ensure updating the values works, round the price to the nearest 100th (for example, 4.124 would be 4.12) and that the value for order_unit_price, order_price_foreign, net_unit_price, and net_price_foreign should all be of equal value.

   Oracle – SQL

   ```
   UPDATE
       PO_LINE
   SET
       ORDER_UNIT_PRICE    = < ORDER_UNIT_PRICE >,
       ORDER_PRICE_FOREIGN = < ORDER_PRICE_FOREIGN >,
       NET_UNIT_PRICE      = < NET_UNIT_PRICE >,
       NET_PRICE_FOREIGN   = < NET_PRICE_FOREIGN >
   WHERE
       PO_PO_NO  = '< PO_PO_NO >'
   ```

```
AND LINE_NO = < LINE_NO >
AND STATUS  = 'OPEN';

COMMIT;
```

For Example:

```
UPDATE
    PO_LINE
SET
    ORDER_UNIT_PRICE    = 4.12,
    ORDER_PRICE_FOREIGN = 4.12,
    NET_UNIT_PRICE      = 4.12,
    NET_PRICE_FOREIGN   = 4.12
WHERE
    PO_PO_NO  = '4B5-2015-0002115'
AND LINE_NO = 1
AND STATUS  = 'OPEN';

COMMIT;
```

SQL Server – SQL

```
UPDATE
  PO_LINE
SET
  ORDER_UNIT_PRICE    = < ORDER_UNIT_PRICE >,
  ORDER_PRICE_FOREIGN = < ORDER_PRICE_FOREIGN >,
  NET_UNIT_PRICE      = < NET_UNIT_PRICE >,
  NET_PRICE_FOREIGN   = < NET_PRICE_FOREIGN >
WHERE
  PO_PO_NO  = '< PO_PO_NO >'
AND LINE_NO = < LINE_NO >
AND STATUS  = 'OPEN';
```

For Example:

```
UPDATE
    PO_LINE
SET
    ORDER_UNIT_PRICE    = 4.12,
    ORDER_PRICE_FOREIGN = 4.12,
    NET_UNIT_PRICE      = 4.12,
    NET_PRICE_FOREIGN   = 4.12
```

```
WHERE
    PO_PO_NO  = '4B5-2015-0002115'
AND LINE_NO = 1
AND STATUS  = 'OPEN';
```

4. Run the **00parts.sql** once all the appropriate lines have been fixed. This file is located where the FA Suite is installed:
    - AppServer > dbobjects > conv

5. If this is pre-migration cleanup, skip this step, and move to the next step. When fixing the PR-ERR 327 error after migration, re-run the Enterprise Purchasing Migration Tool. Verify if any additional PO_PO_NO lines are throwing this error. If there are additional errors, run the below script for each individual PO_PO_NO, then go back and review the information, and run the script to fix those errors. If there are no additional errors, continue to the next step.

    Note: Information for the <PO_PO_NO> is provided from the error logs.

    Oracle and SQL Server – SQL

```
SELECT
    ORDER_UNIT_PRICE,
    ORDER_PRICE_FOREIGN,
    NET_UNIT_PRICE,
    NET_PRICE_FOREIGN,
    PO_PO_NO,
    LINE_NO
FROM
    PO_LINE_PLO_MAIN_WORKTABLE
WHERE
    PO_PO_NO = '<po_po_no>';
```

6. Clean up the tables created as part of this process by running the script below:

    Oracle – SQL

```
DROP
    TABLE PO_LINE_PLO_MAIN_WORKTABLE;
DROP
    SEQUENCE PO_LINE_PLO_MAIN_WORKTABLE_ID;
DROP
    PROCEDURE GET_TOTAL_PO_RECPT;
COMMIT;
SQL Server - SQL
DROP
```

```
    TABLE EMSDBA.PO_LINE_PLO_MAIN_WORKTABLE;
DROP
    PROCEDURE EMSDBA.GET_TOTAL_PO_RECPT;
```

Note: If the zero unit prices solution was applied in the section Check for Zero Unit Price, be sure to set all other prices for the purchase orders in the PR-ERR 327 table to the same price for this process.

Identify Open Purchase Orders that have Closed Related Work Orders

In Enterprise Purchasing, you cannot add a closed work order to an open purchase order. During the migration process, the tool will throw PR-ERR 64 if it finds an open PO that has a related work order that is closed. Closed work orders on open purchase orders will either need to be re-opened or unlinked from the purchase order.

Solution 1:

1. Run the following query to find all work orders that are closed on open purchase orders and export the information into a spreadsheet for reuse in a later step for this process.

   Oracle – SQL

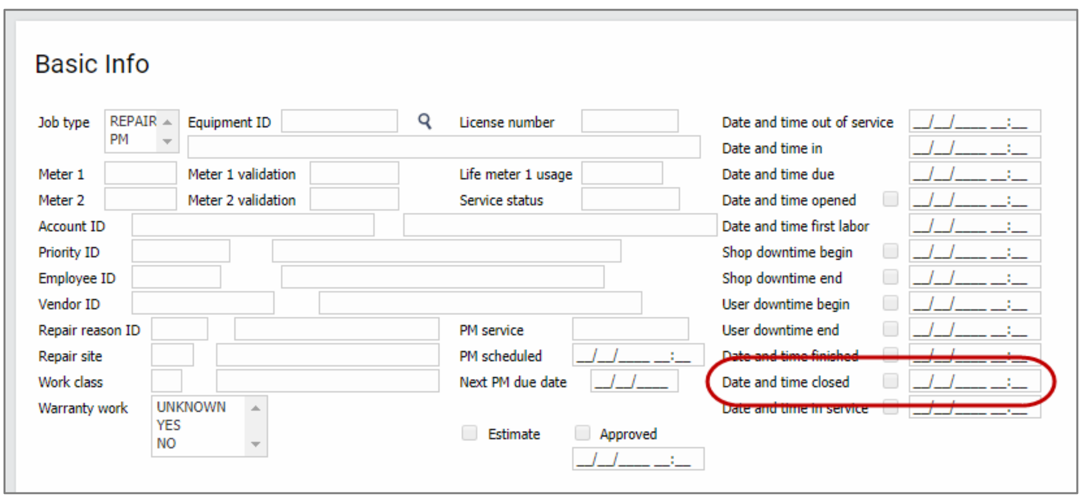
```
ALTER SESSION SET NLS_DATE_FORMAT = 'MM/DD/YYYY HH24:MI';

SELECT
    POW.PO_PO_NO,
    POW.LOC_WORK_ORDER_LOC,
    POW.WORK_ORDER_YR,
    POW.WORK_ORDER_NO,
    JB.DATETIME_CLOSED
FROM
    PO_WORK_ORDER POW,
    JOB_MAIN JB,
    PO_MAIN PM
WHERE
    PM.PO_PO_NO              = POW.PO_PO_NO
AND JB.LOC_WORK_ORDER_LOC = POW.LOC_WORK_ORDER_LOC
AND JB.WORK_ORDER_YR      = POW.WORK_ORDER_YR
AND JB.WORK_ORDER_NO      = POW.WORK_ORDER_NO
AND JB.WORK_ORDER_STATUS  = 'CLOSED'
AND PM.ORDER_STATUS       = 'OPEN';
```

SQL Server – SQL

```
SELECT
    POW.PO_PO_NO,
    POW.LOC_WORK_ORDER_LOC,
    POW.WORK_ORDER_YR,
    POW.WORK_ORDER_NO,
    JB.DATETIME_CLOSED
FROM
    PO_WORK_ORDER POW,
    JOB_MAIN JB,
    PO_MAIN PM
WHERE
    PM.PO_PO_NO              = POW.PO_PO_NO
AND JB.LOC_WORK_ORDER_LOC = POW.LOC_WORK_ORDER_LOC
AND JB.WORK_ORDER_YR      = POW.WORK_ORDER_YR
AND JB.WORK_ORDER_NO      = POW.WORK_ORDER_NO
AND JB.WORK_ORDER_STATUS  = 'CLOSED'
AND PM.ORDER_STATUS       = 'OPEN';
```

2. On the **Work Order Center** screen, uncheck the **Date and time closed** checkbox. This sets the work order to a work finished state.



3. Run the Enterprise Migration tool.

4. When the tool is finished running, recheck the **Date and time closed** checkbox to close the work order.

5. Enter the original date and time in the **Date and time closed** field to set this back to its original value from the exported sheet in step 1.

Solution 2:

1. Run one of the following queries to find open work orders that have related work orders that are closed.

Oracle – SQL

```
SELECT
   POW.PO_PO_NO,
   POW.LOC_WORK_ORDER_LOC,
   POW.WORK_ORDER_YR,
   POW.WORK_ORDER_NO,
   JB.DATETIME_CLOSED
FROM
   PO_WORK_ORDER POW,
   JOB_MAIN JB,
   PO_MAIN PM
WHERE
   PM.PO_PO_NO              = POW.PO_PO_NO
AND JB.LOC_WORK_ORDER_LOC = POW.LOC_WORK_ORDER_LOC
AND JB.WORK_ORDER_YR      = POW.WORK_ORDER_YR
AND JB.WORK_ORDER_NO      = POW.WORK_ORDER_NO
AND JB.WORK_ORDER_STATUS  = 'CLOSED'
AND PM.ORDER_STATUS       = 'OPEN';
```

SQL Server – SQL

```
SELECT
   POW.PO_PO_NO,
   POW.LOC_WORK_ORDER_LOC,
   POW.WORK_ORDER_YR,
   POW.WORK_ORDER_NO,
   JB.DATETIME_CLOSED
FROM
   PO_WORK_ORDER POW,
   JOB_MAIN JB,
   PO_MAIN PM
WHERE
   PM.PO_PO_NO              = POW.PO_PO_NO
AND JB.LOC_WORK_ORDER_LOC = POW.LOC_WORK_ORDER_LOC
AND JB.WORK_ORDER_YR      = POW.WORK_ORDER_YR
AND JB.WORK_ORDER_NO      = POW.WORK_ORDER_NO
AND JB.WORK_ORDER_STATUS  = 'CLOSED'
AND PM.ORDER_STATUS       = 'OPEN';
```

2. Delete or unlink them as long as the line item status is open.

   - Pros: When performing a batch or data load, this only requires one batch or data load instead of two.
   - Cons: History for tracking the relationship between the work order and the purchase order it was applied to is lost, so context is lost.

   Delete or unlink related work orders by opening the **Parts – Order Management** screen. To delete the work order, use a batch or data load, or the following database script to do the deletion work:

   Oracle – SQL

```
DELETE
FROM
    PO_WORK_ORDER POW
WHERE
    POW.LOC_WORK_ORDER_LOC = '<POW.LOC_WORK_ORDER_LOC>'
AND POW.WORK_ORDER_YR     = < POW.WORK_ORDER_YR >
AND POW.WORK_ORDER_NO     = < POW.WORK_ORDER_NO >
AND POW.PO_PO_NO          = '<POW.PO_PO_NO>';
COMMIT;
```

   SQL Server – SQL

```
DELETE
FROM
    PO_WORK_ORDER POW
WHERE
    POW.LOC_WORK_ORDER_LOC = '<POW.LOC_WORK_ORDER_LOC>'
AND POW.WORK_ORDER_YR     = < POW.WORK_ORDER_YR >
AND POW.WORK_ORDER_NO     = < POW.WORK_ORDER_NO >
AND POW.PO_PO_NO          = '<POW.PO_PO_NO>';
```

Find a Required Date that is prior to the Date Ordered for a line item

While uncommon, you may find a required date that is prior to the date ordered for a line item.

Query to identify required dates that are prior to the ordered date:

Oracle and SQL Server – SQL

```
SELECT DISTINCT
    POL.PO_PO_NO,
    POL.LINE_NO
```

```
FROM
   PO_LINE POL,
   PO_MAIN PM
WHERE
   POL.PO_PO_NO        = PM.PO_PO_NO
AND PM.PO_PO_NO       = POL.PO_PO_NO
AND PM.ORDER_STATUS != 'CLOSED'
AND POL.ORDER_DATE    > POL.REQUIRED_DATE;
```

To change the required date field:

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Line Items tab, update the **Required date** field so the date is equal to or greater than the **Date ordered** field on the Basic Info tab.
5. Click **Save**.
6. Run the migration tool again.

4. Additional Information

Unit of Purchase and Vendor Part Records

If a vendor part record does not exist for the item on the old purchase order, it will not have an order unit of measure value on the old purchase order. Enterprise Purchasing sets the default purchase unit of measure per the part location record.

Part Positional Information

Part positional information is not carried over to new purchase orders because this information is only stored on receipts in Enterprise Purchasing, and receipts are not being created during migration. Enter positional data on the line when a PO is received in Enterprise Purchasing.

Sales Tax

Legacy purchasing had options to add sales tax on both purchasing and receiving sides (a checkbox on the PO and Receipt screen line items).

Enterprise Purchasing looks-up the sales tax rate and applies it automatically (although this can be changed or set to 0). Therefore, by default, when POs are migrated, even if **Add sales tax** was not checked, the value on order automatically has sales tax added.

On Order Counts and Values in Legacy versus Enterprise Purchasing

In Enterprise Purchasing, the **Order quantity due out** and **Order value due out** fields (located on the Movement tab of the Parts – Location Information screen) are counted as part of the total **Qty on Order** and **Value on order** fields located on the Parts – Primary Information screen, Stock Status tab.

5. Configuring the Migration Tool

This section outlines the Oracle and MSSQL settings for the Enterprise Purchasing migration tool configuration file.

Oracle

Set the settings in the tool's configuration file as follows:

- Database Type (for example, ORACLE)
- Database Name (for example, Fa1)
- Application Connection String machine and port (for example, FASRV:2060)
- Purchase Type (for example, PTYPE1 – from EP setup above)
- POCloseOnly: Set to one of the following:
    - False: Close the open standard purchase orders and create Enterprise purchase orders
    - True: Only close the standard purchase orders and create the XML files with the data. Refer to the Understanding the Archive Folder section for more information.
- Below is an example of what these settings in the EnterprisePurchasingMigration.exe.config will look like for an Oracle setup:

EnterprisePurchasingMigration.exe.config

```
<?xml version="1.0"?>
<configuration>
    <configSections>
        <section name="FASuiteConfiguration" type="FACommon.Configuration, FACommon"/>
    </configSections>
    <FASuiteConfiguration>
        <add key="FASuite.DataAccess.DatabaseType" value="ORACLE"/>
        <add key="FASuite.DataAccess.DatabaseName" value="fa"/>
        <add key="FASuite.App.ConnectionString" value="localhost:1999"/>
    </FASuiteConfiguration>
    <appSettings>
        <add key="PurchaseType" value="TEST"/>
        <add key="POCloseOnly" value="false "/>
    </appSettings>
<startup><supportedRuntime  version="v4.0" sku=".NETFramework,Version=v4.5.1"/>
</startup>
</configuration>
```

MSSQL

Set the settings in the tool’s configuration file as follows:

- Database type (for example, MSSQL)
- Database server name (for example, MS101/InstanceName – the machine name and instance name if not default)
- Database name (actual name as shown in SQL server management studio), application connection string machine, and port (for example, FASRV:2060) purchase type (for example, PTYPE1 – from EP setup above)
- POCloseOnly: Set to one of the following:
    - False: Close the open standard purchase orders and create the enterprise purchase orders
    - True: Only close the standard purchase orders and create the XML files (refer to the Understanding the Archive Folder section for more information) with the data
- Below is an example of what these settings in the EnterprisePurchasingMigration.exe.config will look like for an MSSQL setup:

EnterprisePurchasingMigration.exe.config

```
<?xml version="1.0"?>
<configuration>
    <configSections>
        <section name="FASuiteConfiguration" type="FACommon.Configuration, FACommon"/>
    </configSections>
    <FASuiteConfiguration>
<add key="FASuite.DataAccess.DatabaseType" value="MSSQL"/>
<add key="FASuite.DataAccess.DatabaseServer" value="server_ip/name"/>
<add key="FASuite.DataAccess.DatabaseName" value="database name"/>
<add key="FASuite.App.ConnectionString" value="faqavm101:2060" />
</FASuiteConfiguration>
<appSettings>
<add key="PurchaseType" value="PTYPE1"/>
<add key="POCloseOnly" value="false"/>
    </appSettings>
<startup><supportedRuntime  version="v4.0" sku=".NETFramework,Version=v4.5.1"/>
</startup>
</configuration>
```

6. Running the Migration Tool

To run the Enterprise Purchasing migration tool:

1. Use a command prompt and navigate to the tool directory (where you unzipped and installed it).
2. Run one of the following depending on whether the user ID uses a password or not:

   Uses password

   `EnterprisePurchasingMigration.exe emsdba ADMIN password`

   Where:

   - Password for account with full direct access to database = emsdba
   - Name of FA application user account with full screen rights = ADMIN
   - Password for FA application user account = password

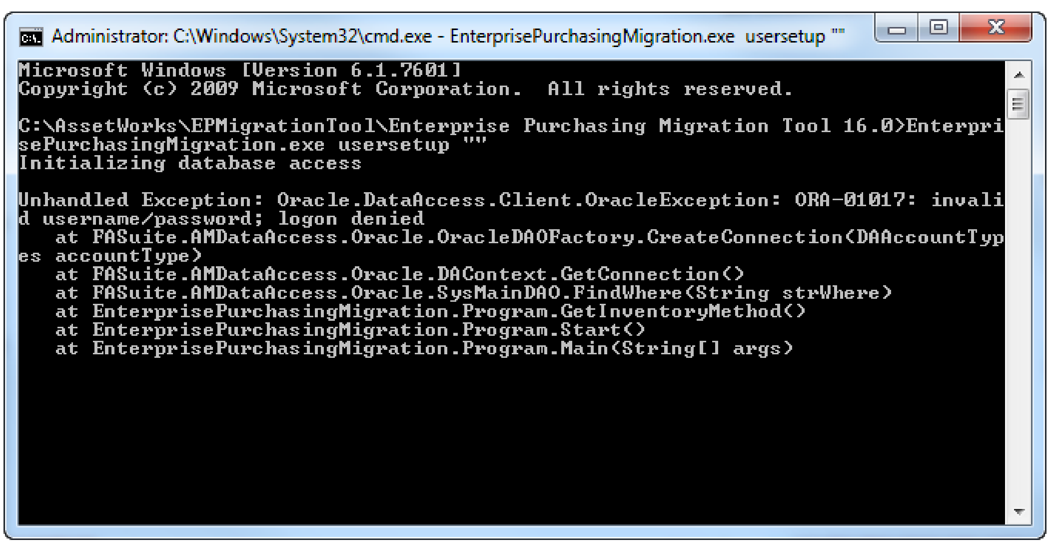
   Does not use password

   If your application user account (for example, the user ID: ADMIN) does not have a password, execute the tool as follows:

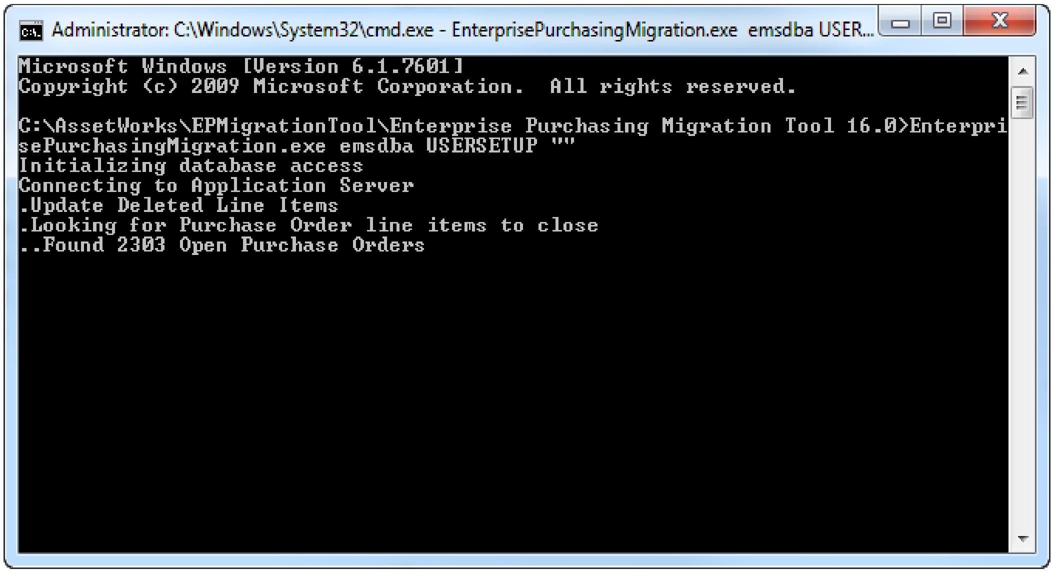
   `EnterprisePurchasingMigration.exe emsdba ADMIN “”`

   Note: The user ID must all be upper case. The password is case sensitive and must match the password entered in the FA application for the user. Refer to the example below if you fun the following script using the user ID murphyj:

   - This example did not work because the user ID usersetup was typed lower case



- This example worked because the user ID USERSETUP was typed Upper case:



Important: Do not manually close or open POs once you have started migrating with the tool. The tool keeps track of the state of POs it is processing, and manually changing the PO status will make them out of sync with the tool, causing processing errors during migration.

You may manually correct problems with older POs and then allow the tool to close or open them. When you correct problems, be sure to save the changes.

After running the tool, XML files are generated that contain the PO and Line Item data.

3. Optional: Open the Archive folder to see the XML files for all POs that are being migrated.

   Note: The Archive directory may be used to identify the migration status of POs. We recommend not modifying the XML files.

To perform a hard stop of the Enterprise Purchasing migration tool:

1. Press **Ctrl** + **C**.
2. When you re-run the tool after the hard stop, the process does not pick up from the last purchase order it process. The migration tool restarts from the beginning and attempts to re-process any purchase order that needs to be closed and migrated, or that needs to be migrated.

Understanding the Archive Folder

Purpose

The Archive folder, found in the Enterprise Purchasing Migration Tool, serves as a record for the state of the migration. The tool relies on the files in this folder to indicate what needs to happen next or if further action needs to be taken.

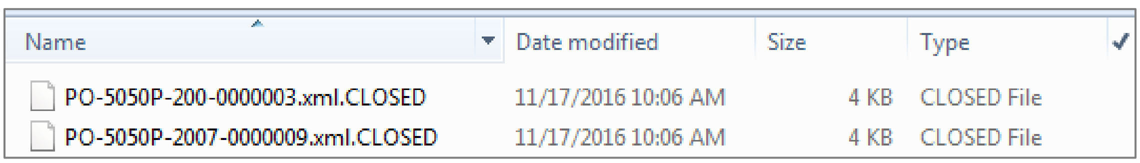
Workflow for the Archive Folder

1. The tool identifies old method purchase orders that are open and exports them to an XML dedicated to the purchase order.

   Console message: Looking for Purchase Order line items to close

2. The tool closes old method purchase orders that have been archived and then changes the XML file extensions to .CLOSED once processed.

   Console message: Closing archived Purchase Order line items

3. Once all the XML files have been set to .CLOSED, all old method purchase orders have been closed, and the purchasing method is switched to Enterprise Purchasing.

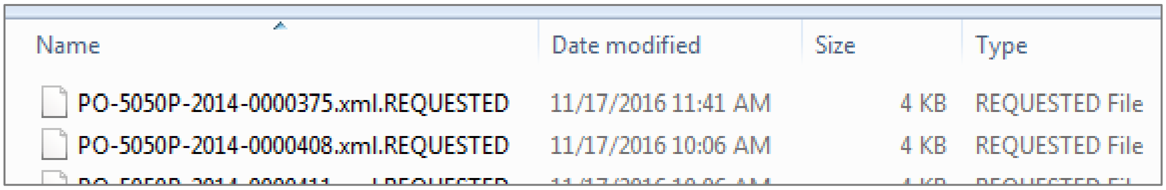
   Console message: Switching system to Enterprise Purchasing

4. Once the system is in Enterprise Purchasing mode, the console will create purchase orders in the new method for the .CLOSED purchase orders. The .CLOSED file extensions will be renamed to .CREATED.

   Console message: Creating new Purchase Orders

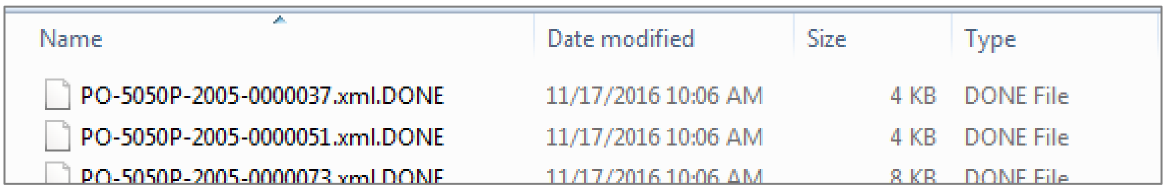
5. Once all .CLOSED purchased orders from the old method have been created in the new Enterprise Purchasing method and the file extensions renamed to .CREATED, if there is a part request attached to the open purchase order line, the part request is migrated and the file extension is renamed .REQUESTED.

   Console message: Getting Part Requests



6. If there is a purchase order note on the .REQUESTED purchase orders, the note is migrated and the .REQUESTED file extension is changed to .DONE.

   Console message: Getting Notes



Archive File Status Rules

- Valid ending status files include .CREATED, .REQUESTED, and .DONE. Not all purchase orders will have part requests or notes and therefore not all the XML files will be named .REQUESTED or .DONE at some point. If the process is done, there will not be any .XML or .CLOSED file extensions in the archive folder.
- The Enterprise Purchasing Migration tool relies on the Archive folders and its files to be able to properly process purchase orders. Once the purchasing method is switched to Enterprise, the tool relies on the files in the folder to be intact to know what needs to be done next.
- All .CLOSED files must become .CREATED files before they can be processed for .REQUESTED or .DONE.

Sample Errors and Recovery

This section provides a non-inclusive list of potential errors (and recovery) when the tool closes old POs and opens new POs in Enterprise Purchasing.

Error	Description and Fix
PR-ERR: 2	**Cannot reference Purchase type ID - not defined in database** • This error occurs when the Enterprise Purchasing purchase type was not created per the instructions in Pre-Migration section. • Create the purchase type as outlined in the Pre-Migration section and make sure the migration configuration file is updated to use this purchase type ID.
PR-ERR: 3	**Value required for product category** • This validation could be triggered if it is set to be required in the FA option sys_internal.req_orderer_prod_cat = "Y." This option field is not directly accessible via the screens. For more information, refer to the Cleanup for Bad Product Categories section. **Value required for address ID** • To fix this error, set a valid address ID and re-process the migration. For more information, refer to the Check for NULL Address IDs section. **Value is required for unit of measure** • Set the unit of measure on the Parts – Location Information screen. When the Unit of Measure (UOM) is set, it defaults properly on the new Enterprise Purchasing PO when the Enterprise Purchasing migration tool creates the new purchase orders. • Having a unit of measure was not required in legacy purchasing when the part location record was created automatically (for example, entering a part on a PO that did not have a part location record yet for that location). As a result, the Parts – Location Information record did not have a unit of measure. Purchasing was not stopped with validation and the old purchase order line was created without the UOM. To create the UOM, refer to the Required Steps section. **Value is required for price type** • This error is thrown when a line item on a purchase order does not have a price type set. For more information, refer to the Check for NULL Price Types section. **Value is required for vendor contract ID** Provide a Vendor Contract ID for the appropriate line item. For more information, refer to the Identify NULL Vendor Contract IDs section.
PR-ERR: 19	**Location XXXX is not a work order location** The location for the related work order on the purchase order needs to have the Work orders permitted setting checked. For more information, refer to the PR-ERR: 19 - Location XXXX is Not a Work Order Location section below.

Error	Description and Fix
PR-ERR: 64	**Work order status is closed** The tool is trying to recreate a purchase order that is open in the new purchasing method, but the open purchase order has a related work order on it that is closed. You cannot add a related work order to a purchase order if the work order is closed. For more information, refer to the Identify Open Purchase Orders that have Closed Related Work Orders section.
PR-ERR: 180	**Vendor ID not active** While not common, vendors may have been set to inactive while they still had open POs. Users may modify the vendor to de-activate them even though they had open POs. For more information, refer to the Check for Inactive Vendor IDs section.
PR-ERR: 320	**Price out of range from last order price** Turn off part price deviation messaging to get past this error. Refer to the Pre-Migration Required Steps section for more information.
PR-ERR: 248	Transaction date is not within range of start and end dates of vendor contract If a PO is out of the date range on the vendor contract, then there is a data discrepancy. Previously, users were allowed to change effective dates on the vendor contract regardless of open PO lines that it might affect (by order date). For more information refer to the PR-ERR: 248 - Transaction Date is Not Within Range of Start and End Dates of Vendor Contract section.
PR-ERR: 327	**Order line item causes negative quantity or value on order** This error is generated if the **On Order** for a line item is less than what is ordered. • The script, **00parts.sql**, is located in the installation directory in the AppServer\dbobjects\conv folder. Run this script to fix the bad data counts. Be sure you are logged in as EMSDBA when you run the script. Refer to the Identify the Items that can Cause a PR-ERR 327 section for more information.
PR-ERR: 513	**Order prohibited for part** This error can occur if parts are switched from STOCKED status since the order was created. For more information, refer to the PR-ERR: 513 - Order Prohibited for Part section.
PR-ERR: 804	**Required date cannot be prior to date ordered on basic info** While uncommon, this may occur. This is when the **Required date** field on a line item is set to a date after the **Ordered date** field. For more information, refer to the Find a Required Date that is prior to the Date Ordered for a line item section.
PR-ERR: 1082	**Unit price is required and must be greater than zero** This error is encountered after all POs are closed in the legacy purchasing tables, and the migration tool is attempting to generate POs in the Enterprise Purchasing tables, but is finding zero unit prices For more information, refer to the Check for Zero Unit Price section.

<table>
<tr><th>Error</th><th>Description and Fix</th></tr>
<tr><td>PR-ERR: 1325</td><td>

Part ID-suffix xx-xx-x product category is xx-xx

This PR-ERR occurs when the product category on the PO line does not match the product category for the part in the Parts – Primary Information screen.

If the part product category ID was changed after the PO line item was created, it will trigger validation when attempting to close the line on the purchase order (which was not updated when the product category was changed on the part). For more information, refer to the Check for NULL or Mismatched Product Categories section.

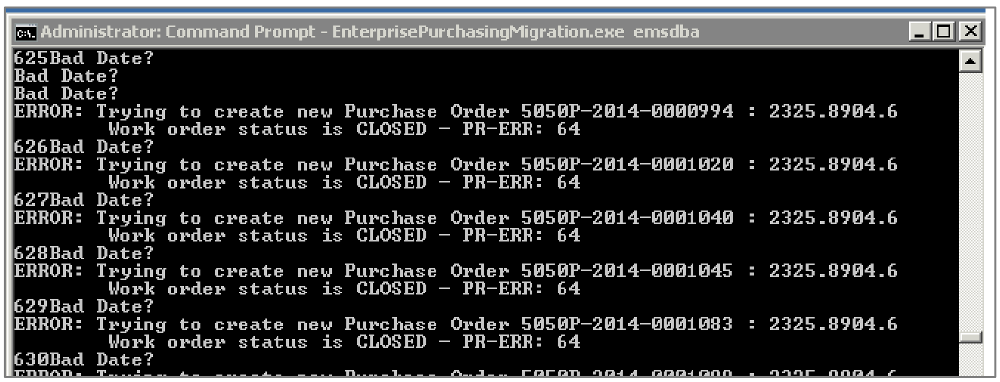
</td></tr>
<tr><td>PR-ERR: 1384</td><td>

Purchase type cannot be used on purchase orders

Enable the Enterprise Purchasing purchase type to be allowed on purchase orders. For more information, refer to the PR-ERR: 1384 - Purchase type cannot be used on purchase orders section.

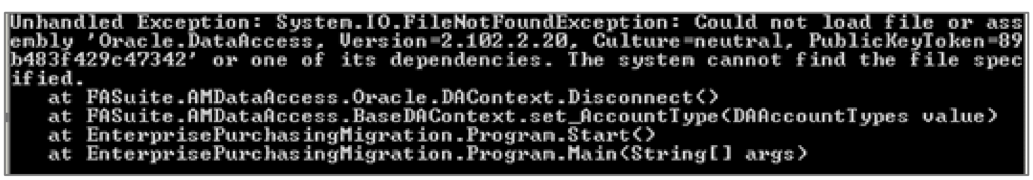
</td></tr>
<tr><td>Bad Date?</td><td>

This is a known normal processing error and there should be no concerns if it pops up. It is a result of the inability to parse the InDate (required date, order date, exp delivery date, order date, or external status date).



</td></tr>
<tr><td>Unhandled Exception</td><td>

System.IO.FileNotFoundException: Could not load file or assembly

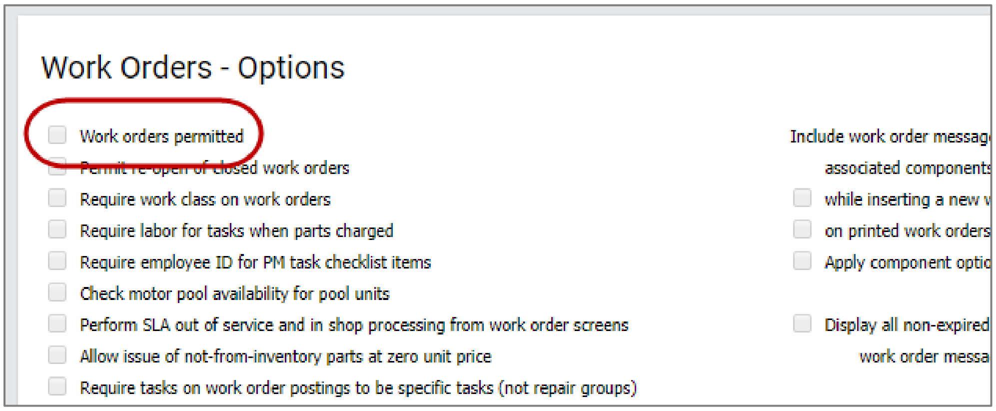


The error occurs because the application is running as 64-bit and cannot find a 64-bit Oracle client to connect to the database. Run the **Set32.bat** file in the CorFlaq directory of the tool to fix this.

</td></tr>
</table>

PR-ERR: 19 - Location XXXX is Not a Work Order Location

Solution: The location for the related work order on the purchase order needs to have the **Work orders permitted** setting checked.



To enable the Work orders permitted setting:

1. Open the Locations – Primary Information screen.
2. Search for the correct location.
3. Click **Edit**.
4. On the Work Orders – Options tab, check the **Work orders permitted** checkbox to enable this option.
5. Click **Save**.

PR-ERR: 248 - Transaction Date is Not Within Range of Start and End Dates of Vendor Contract

If a PO is out of the date range on the vendor contract, then there is a data discrepancy. Previously, users were allowed to change effective dates on the vendor contract regardless of open PO lines that it might affect (by order date).

To change the date on a PO:

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Line Items tab, find the line item that falls outside of the for the vendor contract. Apply one of the following options:
   - Update the **Begin date** or **End date** on the older vendor contract to allow the order date found on the purchase order line item.
   - Update the **Order date** on the purchase order line item to fall within the vendor contract date range (this may require updating the **Required date** too because of validations).
   - Remove the vendor contract ID from the purchase order line item if it does not really apply (but if it does, leave it so that it can be properly tracked), and replace with a different (valid) vendor contract ID.
   - Enter the appropriate vendor contract to use (on vendor contracts screen) with correct **Begin date** and **End date**. Then apply that vendor contract ID to the affected purchase order line item (if there really was a new vendor contract that applied for the date of the order).

PR-ERR: 513 - Order Prohibited for Part

This error can occur if parts are switched from STOCKED status since the order was created.

To enable the Work orders permitted setting:

1. Open the Parts - Location Information screen.
2. Search for the correct part ID.
3. Click **Edit**.
4. On the Stock Mgmt tab, change the **Stock Status** to **STOCKED**.
5. Click **Save**.

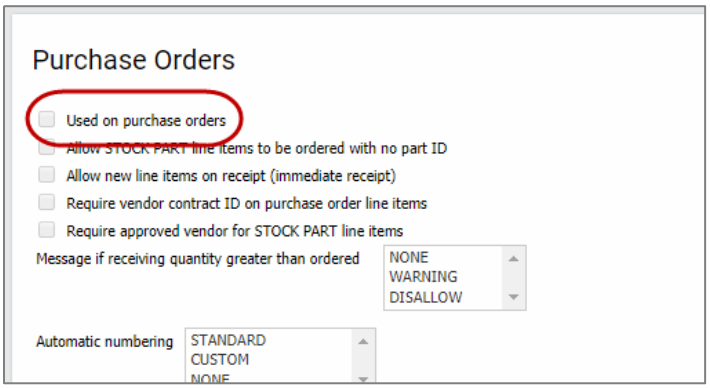
6. Run the migration tool again.

PR-ERR: 1384 - Purchase type cannot be used on purchase orders

Enable the Enterprise Purchasing purchase type to be allowed on purchase orders.

To enable a purchase type on purchase orders:

1. Open the Purchase Types screen.
2. Search for the correct purchase type.
3. Click **Edit**.
4. On the Purchase Orders tab, check the **Used on purchase orders** checkbox to enable this purchase type to be used on purchase orders.



5. Click **Save**.

PR-ERR: 1483 - Vendor contract ID XXXXXXX has only XXXX remaining unused

The remaining balance on the contract must be increased to an amount great enough to allow the purchase order to be created.

Option 1 – Change the purchasing limit:

1. Open the Vendor Contracts screen.
2. Search for the correct vendor contract ID.
3. Click **Edit**.
4. On the Basic Info tab, update the **Purchasing Limit** field.
5. Click **Save**.

Option 2 – Remove the line item:

1. Open the Parts Order Management screen.
2. Search for the correct purchase order.
3. Click **Edit**.
4. On the Line Items tab, find the line item that needs the product category fixed.
5. Check the **Delete** checkbox for the line item.
6. On the Comments tab, leave a comment as to why you are deleting the line item with the vendor contract ID for reconciliation.
7. Click **Save**.

Appendix A. Example Log File

The following is an example of a log file generated from running the Enterprise Purchasing migration tool.

```
C:\MigrationTool\EnterprisePurchasingMigrationTool>enterprisepurchasingmigration
.exe emsdba MURPHYJ freebird Initializing database access Connecting to
Application Server
.Update Deleted Line Items
.Looking for Purchase Order line items to close
..Found 320 Open Purchase Orders
...Archived 566 line items from 320 Purchase Orders
.Closing archived Purchase Order line items
..2ERROR: Trying to close line items on E6200-2009-0002781
Part ID-suffix 62052G-0 product category is NEWPART - PR-ERR: 1325 13ERROR:
Trying to close line items on P0111-2009-0005806
Part ID-suffix 003467002AB-0 product category is NEWPART - PR-ERR: 1325 43ERROR:
Trying to close line items on P0500-2009-0011216
Part ID-suffix 510506446-0 product category is NEWPART - PR-ERR: 1325 53ERROR:
Trying to close line items on P0500-2009-0011794
Part ID-suffix SHIELD-1 product category is NEWPART - PR-ERR: 1325 67ERROR:
Trying to close line items on P0500-2009-0012679
Part ID-suffix 86-2560-01-0 product category is NEWPART - PR-ERR: 1325 73ERROR:
Trying to close line items on P0500-2009-0012956
Part ID-suffix 3115-2 product category is NONE - PR-ERR: 1325 91ERROR: Trying to
close line items on P0500-2009-0013219
Part ID-suffix 71LB00290-0 product category is NEWPART - PR-ERR: 1325 94ERROR:
Trying to close line items on P0500-2009-0013233
Part ID-suffix 9026-2 product category is NEWPART - PR-ERR: 1325 111ERROR:
Trying to close line items on P0500-2009-0013331
Part ID-suffix 7271202-0 product category is NEWPART - PR-ERR: 1325 117ERROR:
Trying to close line items on P0500-2009-0013393
Part ID-suffix 90395S5A003-0 product category is NEWPART - PR-ERR: 1325
124ERROR: Trying to close line items on P0500-2009-0013432
Part ID-suffix 3007376.6-0 product category is NEWPART - PR-ERR: 1325 125ERROR:
Trying to close line items on P0500-2009-0013434
Order line item causes negative quantity or value on order\nLine item 1
-- part ID-suffix/location 3097105114-0/P0500\nQuantity on order -2.00 -- value
on order 0.000000\n
Order line item causes negative quantity or value on order - PR-ERR: 327 373
126ERROR: Trying to close line items on P0500-2009-0013436
Part ID-suffix 3506545C1-0 product category is NEWPART - PR-ERR: 1325 130ERROR:
Trying to close line items on P0500-2009-0013451
```

```
Part ID-suffix A2241330000-0 product category is NEWPART - PR-ERR: 1325
158ERROR: Trying to close line items on P0500-2009-0013493
Value is required for Price type - PR-ERR: 3
172ERROR: Trying to close line items on P900-2009-0014220
Part ID-suffix 1093-1 product category is NEWPART - PR-ERR: 1325 188ERROR:
Trying to close line items on P900-2009-0014296
Part ID-suffix 7101069-0 product category is NEWPART - PR-ERR: 1325 189ERROR:
Trying to close line items on P900-2009-0014299
Part ID-suffix 7703768-0 product category is NEWPART - PR-ERR: 1325 204ERROR:
Trying to close line items on S4000-2008-0004031
Part ID-suffix 0029727-0 product category is NEWPART - PR-ERR: 1325 206ERROR:
Trying to close line items on S4000-2008-0004308
Part ID-suffix 537199202-0 product category is NEWPART - PR-ERR: 1325 208ERROR:
Trying to close line items on S4000-2009-0004538
Part ID-suffix 1834491C1-0 product category is NEWPART - PR-ERR: 1325 216ERROR:
Trying to close line items on S4100-2008-0000604
Part ID-suffix 1503007-0 product category is NEWPART - PR-ERR: 1325 233ERROR:
Trying to close line items on S4200-2008-0001038
Part ID-suffix 12336026-0 product category is NONE - PR-ERR: 1325 240ERROR:
Trying to close line items on S4200-2009-0001174
Part ID-suffix 55180-0 product category is NEWPART - PR-ERR: 1325 242ERROR:
Trying to close line items on S4200-2009-0001176
Part ID-suffix 25-22508-0 product category is NEWPART - PR-ERR: 1325 255ERROR:
Trying to close line items on W3000-2009-0008198
Part ID-suffix 9208529-0 product category is NEWPART - PR-ERR: 1325 262ERROR:
Trying to close line items on W3300-2009-0002701
Part ID-suffix B1WE307-0 product category is NEWPART - PR-ERR: 1325 265ERROR:
Trying to close line items on W3300-2009-0002737
Transaction date is not within range of start and end dates of vendor co ntract
- PR-ERR: 248
272ERROR: Trying to close line items on W3300-2009-0002746
Part ID-suffix 33810043-0 product category is NEWPART - PR-ERR: 1325 285ERROR:
Trying to close line items on ZAUTO-2009-0001558
Part ID-suffix OTC 3862-0 product category is NEWPART - PR-ERR: 1325 292ERROR:
Trying to close line items on ZBODY-2009-0000359
Part ID-suffix 6652372-0 product category is NEWPART - PR-ERR: 1325 293ERROR:
Trying to close line items on ZCYCLE-2009-0000080
Part ID-suffix 9854-1 product category is NEWPART - PR-ERR: 1325 302ERROR:
Trying to close line items on ZSAFET-2009-0000014
Part ID-suffix LUX-SSFULLG-0 product category is NEWPART - PR-ERR: 1325
303ERROR: Trying to close line items on ZSAFET-2009-0000015
Part ID-suffix 40988-0 product category is NEWPART - PR-ERR: 1325
320
```

```
Purchase Orders still pending closure:
E6200-2009-0002781
P0111-2009-0005806
P0500-2009-0011216
P0500-2009-0011794
P0500-2009-0012679
P0500-2009-0012956
P0500-2009-0013219
P0500-2009-0013233
P0500-2009-0013331
P0500-2009-0013393
P0500-2009-0013432
P0500-2009-0013434
P0500-2009-0013436
P0500-2009-0013451
P0500-2009-0013493
P900-2009-0014220
P900-2009-0014296
P900-2009-0014299
S4000-2008-0004031
S4000-2008-0004308
S4000-2009-0004538
S4100-2008-0000604
S4200-2008-0001038
S4200-2009-0001174
S4200-2009-0001176
W3000-2009-0008198
W3300-2009-0002701
W3300-2009-0002737
W3300-2009-0002746
ZAUTO-2009-0001558
ZBODY-2009-0000359
ZCYCLE-2009-0000080
ZSAFET-2009-0000014
ZSAFET-2009-0000015

C:\MigrationTool\EnterprisePurchasingMigrationTool>enterprisepurchasingmigration
.exe emsdba MURPHYJ freebird Initializing database access Connecting to
Application Server
.Update Deleted Line Items
.Looking for Purchase Order line items to close
..Found 320 Open Purchase Orders
```

```
...Archived 98 line items from 34 Purchase Orders
.Closing archived Purchase Order line items
..111ERROR: Trying to close line items on P0500-2009-0013331
Part ID-suffix 7271203-0 product category is NEWPART - PR-ERR: 1325 125ERROR:
Trying to close line items on P0500-2009-0013434
Order line item causes negative quantity or value on order\nLine item 1
-- part ID-suffix/location 3097105114-0/P0500\nQuantity on order -2.00 -- value
on order 0.000000\n
Order line item causes negative quantity or value on order - PR-ERR: 327 373
302ERROR: Trying to close line items on ZSAFET-2009-0000014
Part ID-suffix 019705-00031-0 product category is NEWPART - PR-ERR: 1325

303ERROR: Trying to close line items on ZSAFET-2009-0000015
Part ID-suffix V15 WILSON HEADGEAR-0 product category is NEWPART - PR-
ER
R: 1325
320

Purchase Orders still pending closure:
P0500-2009-0013331
P0500-2009-0013434
ZSAFET-2009-0000014
ZSAFET-2009-0000015
C:\MigrationTool\EnterprisePurchasingMigrationTool>l>
```