

## PO.020.200 – DISPATCHING A PURCHASE ORDER

<b>Purpose</b>	<ul style="list-style-type: none"> <li>To understand the PO Status and Budget Status required to dispatch a PO.</li> <li>To understand the three main ways a PO can be dispatched.</li> </ul>
<b>Description</b>	<p>There are three main places in PeopleSoft that purchase orders can be dispatched: from the Add/Update POs page, from the Dispatch POs page and from the Buyer's Workbench.</p> <p>Additionally, Purchase Orders dispatch methods include electronic transmission (EDX), email, phone or fax depending on the supplier preference.</p>
<b>Security Role</b>	<p>BOR_PO_MAINTAIN (Add/Update POs page)          BOR_PO_PROCESS (Dispatch POs page)</p>
<b>Dependencies/ Constraints</b>	<ul style="list-style-type: none"> <li>Purchase Order status must be either Approved or Pending Cancel status</li> <li>Budget status must be Valid</li> </ul>
<b>Additional Information</b>	<p>This process should not be used to print a copy of a purchase order. To print a purchase order, see PO.020.210 – Printing Purchase Orders.</p> <p>Purchase orders can also be dispatched from the Buyer's Workbench. For more information, see PO.020.280 – Using the Buyer's Workbench.</p>

## Procedure

Below are step by step instructions on how to dispatch an individual PO from the Add/Update PO page.

Step	Action
1.	Click the <b>NavBar</b> icon
2.	Click the <b>Menu</b> icon.
3.	Click the <b>Purchasing</b> link.
4.	Click the <b>Purchase Orders</b> link.
5.	Click the <b>Add/Update POs</b> link.
6.	Click the <b>Find an Existing Value</b> tab.
7.	Enter or search for an existing purchase order.
8.	Click an entry in the <b>PO ID</b> column.
9.	Verify the <b>PO Status</b> is either Approved or Pending Cancel.
10.	Verify the <b>Budget Status</b> is Valid.  <i>Note: if the budget status is set to Not Chk'd the PO will need to be budget checked successfully before it can be dispatched. To budget check from the Add/Update POs page, simply click the Budget Check icon.</i>
11.	Select one of the following from the <b>Dispatch Method</b> dropdown list: <ul style="list-style-type: none"> <li>• <b>EDX:</b> this option is used with the GeorgiaFIRST Marketplace and sends the selected purchase order(s) electronically to the supplier.</li> <li>• <b>Email:</b> if a supplier's email address is defined on their profile, this option will distribute to the email address listed.</li> <li>• <b>Fax:</b> if a supplier's fax number is defined on their profile, this option will be distributed to the fax number listed.</li> <li>• <b>Phone:</b> Not applicable</li> <li>• <b>Print:</b> will create an authorized version of the purchase order that will be available in the Report Manager for the user to access.</li> </ul>
12.	Click the <b>Dispatch</b> button.

Step	Action
13.	<p>The system generates the Dispatch Options popup window. Users can select any or all of the following options:</p> <ul style="list-style-type: none"> <li>• <b>Test Dispatch checkbox:</b> if selected, the process will perform a test run of the dispatch. With this option, the process runs, but the purchase orders processed do not appear in Dispatched status, and the purchase orders are printed with the word Unauthorized at the bottom of the page. This allows users to test the EDX, email, or fax setup without updating the system.</li> <li>• <b>Print BU Comments checkbox:</b> if selected, the process will print comments, such as Terms and Conditions, defined for the PeopleSoft Purchasing business unit on the purchase order upon dispatch.</li> <li>• <b>Print Duplicate checkbox:</b> if selected, the process will print the word “Duplicate” on each purchase order.</li> <li>• <b>Print Changes Only checkbox:</b> if selected, the process will dispatch only the changes to the purchase order, rather than the entire purchase order.</li> <li>• <b>Print PO Item Description checkbox:</b> Not applicable.</li> <li>• <b>Print Copy checkbox:</b> if selected, the process will produce a printed copy of each processed purchased order. If any of the processed purchase orders are done by phone, fax, email, or EDX, the system prints a hard copy for review.</li> <li>• <b>Print Closed Line Amount:</b> if this box is checked, the Extended Amount will print on the purchase order for any closed lines as well as open lines.</li> </ul>
14.	<p>Select the <b>OK</b> button. The system displays the following message:</p> <p>“Would you like to wait for confirmation that the PO Dispatch process has been completed?</p> <p>Your request is currently in progress. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.”</p>
15.	<p>Select Yes or No depending on your preference.</p>

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Step	Action
16.	If the PO Dispatch Method was printed, navigate to the Report Manager to retrieve the authorized version of the PO.  For more information, see PO.020.210 – Printing Purchase Orders.

Below are step by step instructions on how to dispatch multiple purchase orders in batch.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Navigator</b> icon.
3.	Click the <b>Purchasing</b> link.
4.	Click the <b>Purchase Orders</b> link.
5.	Click the <b>Dispatch POs</b> link.
6.	<p>Enter or search for a <b>Run Control ID</b>.</p> <p>A Run Control ID is an identifier that, when paired with a User ID, uniquely identifies the process running. The Run Control ID defines parameters the system uses each time the process runs. This ensures that when a process runs in the background, the system does not prompt users for additional values.</p>
7.	Enter or search for the institution's business unit number in the <b>Business Unit</b> field.
8.	Enter or search for the institution's business unit number in the <b>To</b> field.
9.	<p>Users can add additional criteria to narrow down the search results. The most used criteria include:</p> <ul style="list-style-type: none"> <li>• <b>PO ID</b></li> <li>• <b>From Date</b></li> <li>• <b>Through Date</b></li> </ul>
10.	<p>Alternatively, users can narrow search results based on the purchase order statuses in the <b>Statuses to Include</b> section. Statuses include:</p> <ul style="list-style-type: none"> <li>• <b>Approved</b></li> <li>• <b>Dispatched</b></li> <li>• <b>Pending Cancel</b></li> </ul> <p><b>Note:</b> When a specific purchase order ID is not entered, users must select at least one status option.</p>

Step	Action
11.	<p>Use the <b>Dispatch Methods to Include</b> section to select which dispatch methods to include in this run of the process.</p> <p>Select any or all the dispatch methods to include in this run of the process:</p> <ul style="list-style-type: none"> <li>• <b>EDX:</b> this option is used with the GeorgiaFIRST Marketplace and sends the selected purchase order(s) electronically to the supplier.</li> <li>• <b>Email:</b> GeorgiaFIRST Financials does not currently use this functionality.</li> <li>• <b>Fax:</b> GeorgiaFIRST Financials does not currently use this functionality.</li> <li>• <b>Phone:</b> Not applicable</li> <li>• <b>Print:</b> will create an authorized version of the purchase order that will be available in the Report Manager for the user to access.</li> </ul> <p><b>Note:</b> To change the dispatch method, modify it via the Add/Update POs page.</p> <p><b>Note:</b> Do not use the Dispatch Process to print an authorized version of the purchase order. To print an authorized version, see PO.020.210 – Printing Purchase Orders.</p>

12. Select any or all of the Miscellaneous Options to include in this run of the process:
- **Chartfields:** select Valid Chartfields.
  - **Change Orders:** Verify Changed and Unchanged Orders is selected to include all POs regardless of whether or not they have a change order.
  - **Print Changes Only checkbox:** if selected, the process will dispatch only the changes to the purchase order, rather than the entire purchase order.
  - **Test Dispatch checkbox:** if selected, the process will perform a test run of the dispatch. With this option, the process runs, but the purchase orders processed do not appear in Dispatched status, and the purchase orders are printed with the word Unauthorized at the bottom of the page. This allows users to test the EDX, email, or fax setup without updating the system.
  - **Print Copy checkbox:** if selected, the process will produce a printed copy of each processed purchased order. If any of the processed purchase orders are done by phone, fax, email, or EDX, the system prints a hard copy for review.
  - **Print BU Comments checkbox:** if selected, the process will print comments, such as Terms and Conditions, defined for the PeopleSoft Purchasing business unit on the purchase order upon dispatch.
  - **Print PO Item Description checkbox:** not applicable.
  - **Print Duplicate checkbox:** if selected, the process will print the word "Duplicate" on each purchase order.
  - **Print Closed Line Amount:** if this box is checked, the Extended Amount will print on the purchase order for any closed lines as well as open lines.
  - **Sort By:** select to sort by purchase order line number or ShipTo ID.

**Note:** For institutions using the GeorgiaFIRST Marketplace, Standard Comments will not appear on purchase orders dispatched via EDX as this information is not conveyed in the XML code used to electronically send the

Step	Action
	<p><i>Purchase Order to the GFM Supplier.</i></p> <p><i>However, all GeorgiaFIRST Marketplace Purchase Orders do contain a statement regarding State of Georgia Contract Terms and Conditions for every business unit.</i></p>
13.	Click the <b>Save</b> button.
14.	Click the <b>Run</b> button.
15.	On the <b>Process Scheduler Request</b> page, select the PO BI Publisher Dispatch option.
16.	Select the <b>Type</b> and <b>Format</b> from the dropdown menu.
17.	Click the <b>OK</b> button.
18.	Verify a <b>Process Instance</b> number appears. This number helps to identify the process when a user checks the status.
19.	Click the <b>Process Monitor</b> link.
20.	Use the <b>Process List</b> page to view the status of submitted process requests.
21.	The process is finished when the status runs to Success. Continue to click the <b>Refresh</b> button until the status runs to Success.
22.	Click the <b>Report Manager</b> link. The system defaults to the List tab.
23.	Click the <b>Administration</b> link.
24.	Click on the <b>PO_DISPATCH</b> hyperlink to access the file.