

## PO.030.010 – Dispatching Purchase Orders (Batch Process)

<p><b>Purpose</b></p>	<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 main pages in PeopleSoft where users can dispatch POs.</li> <li>• To generate an authorized version of the purchase order.</li> </ul>
<p><b>Description</b></p>	<p>Dispatching a purchase order transmits the order request from PeopleSoft to the supplier. The same rules apply to dispatching Purchase Orders regardless of the page or dispatch method used. That is, a Purchase Order must have a status of Approved or Pending Cancel with a Valid Budget Status to be eligible for dispatch.</p> <p>For convenience, users can dispatch purchase orders from any of the following pages:</p> <ul style="list-style-type: none"> <li>• Add/Update POs</li> <li>• Add/Update Express POs</li> <li>• Buyer’s Workbench</li> <li>• Dispatch Purchase Orders</li> </ul> <p>Purchase Orders can be dispatched either individually or in volume by the batch process. Dispatching purchase orders from the Add/Update POs page and the Add/Update Express POs page allows users to dispatch purchase orders individually. The Buyer’s Workbench page and the Dispatch Purchase Orders page allows users to dispatch a single or multiple purchase orders at one time.</p> <p>The Dispatch Purchase orders page allows users to schedule a background batch job to dispatch a single purchase order or multiple purchase orders that meet the selection criteria set by the user.</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>	<b>BOR_PO_PROCESS</b>
<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> <p>An authorized version of the purchase order is the legally binding document between the organization and the supplier. The system will generate an authorized version if the PO is in an Approved status or a user creates a Change Order and the changes need to be communicated to the supplier. All other PO versions will say Unauthorized to differentiate them from the actual dispatched PO.</p>

### Procedure

Below are step-by-step instructions on how to dispatch purchase orders via batch processing.

<b>Step</b>	<b>Action</b>
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>Dispatch POs</b> link.

Step	Action
6.	<p>Enter or search for a <b>Run Control ID</b>. The system navigates to the Dispatch POs page.</p> <p>A Run Control ID is an identifier that when paired with a User ID, uniquely identifies the process being run. The Run Control ID defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt a user for additional values.</p>
7.	<p>Enter criteria in the <b>Process Request Parameters</b> section to narrow the scope to specific purchase orders. Users can enter any of the following criteria to narrow down scope:</p> <ul style="list-style-type: none"> <li>• <b>Business Unit and To:</b> enter or select the business unit</li> <li>• <b>PO ID:</b> If needed, enter or select a single purchase order to dispatch</li> <li>• <b>PO Status:</b> Displays the current status of the PO. This field appears when you select a single PO.</li> <li>• <b>From Date and To Date:</b> Enter or select dates to dispatch POs based on PO dates</li> <li>• <b>Contract ID:</b> enter or select a contract number if the PO that you are to dispatch is associated with a contract</li> <li>• <b>Supplier ID:</b> Displays the PO supplier</li> </ul> <p><b>Buyer:</b> displays the PO buyer</p>
8.	<p>In the <b>Statuses to Include</b> section, select whether to include POs with Approved, Dispatched or Pending Cancel statuses in this run of the dispatch process.</p> <p><i><b>Note:</b> When a specific PO ID is not entered users must select at least one Status option.</i></p>

Step	Action
9.	<p>In the <b>Dispatch Methods to Include</b>, select which dispatch methods to include in this run of the process. Selected values are only used as a part of the data selection criteria.</p> <p><b>Note:</b> To change the method by which the PO is to be dispatched, modify the dispatch method on the Add/Update POs page:</p> <ul style="list-style-type: none"> <li>• <b>Print:</b> prints the PO and sets the PO status to Dispatched. You can select to format the printed PO using the SQR report (default) or BI Publisher</li> <li>• <b>Email:</b> Uses the dispatch process to set the purchase order status to Dispatched and to create a purchase order file in the location that you specify on the File Locations page. The Email process (PO_PO_EMAIL) picks up the output file from the specified location and sends an email message with the purchase order as an attachment.</li> <li>• <b>Fax:</b> The default output format from the PeopleSoft Process Scheduler Request page is PDF. If the fax software does not support the PDF file format, then select an output format that the fax software can handle. If the fax software does not support PDF files, we recommend that you process all of the purchase orders that are to be dispatched through fax together and that you do not print a hard copy at the same time. In the Dispatch Methods to Include group box, select the FAX method only and do not select the Print Copy check box. Then, on the Process Scheduler Request page, select the appropriate output format supported by your fax software</li> <li>• <b>Phone:</b> functionality not used by GeorgiaFIRST Financials.</li> <li>• <b>EDX:</b> Uses the dispatch process to update a series of EC outbound staging tables, including; PS_PO_HDR_OUT_EC, PS_PO_LINE_OUT_EC, and PS_PO_SHIP_OUT_EC. A service operation within the PeopleSoft Integration Broker is required to deliver purchase orders to the recipients through designated channels. The publishing of the outbound data (using a service operation) is sometimes a separate process and sometimes combined with the initial process</li> <li>• <b>Print Only</b></li> </ul>

10.

In the **Miscellaneous Options** section, select any or all of the following options to narrow the scope of POs to be dispatched:

- **Chartfields:** This dropdown menu allows users to select POs to be dispatched either by Recycled AND Valid ChartFields, Recycled Chartfields, or Valid Chartfields. Select Recycled AND Valid ChartFields to process purchase orders regardless of whether the ChartFields are valid or recycled. Select Recycled Chartfields to process only purchase orders with distribution lines whose ChartFields are identified as Recycled. Or select Valid Chartfields to process only purchase orders with distribution lines whose ChartFields are identified as Valid.
- **Change Orders:** This dropdown menu allows users to select POs based on whether or not a change order has been created for the PO. Select Changed Orders to process only purchase orders that have been changed. Select Changed and Unchanged Orders to process purchase orders regardless of whether or not a Change Order has been created. Select Unchanged Orders to process only purchase orders that have never been changed.
- **Print Changes Only:** Select to dispatch only the changes to the purchase order, rather than the entire purchase order.
- **Test Dispatch:** this option performs a test run of the dispatch. When you select this check box, the process runs, but the purchase orders processed do not change to a Dispatched status, and the purchase orders are printed with the word Unauthorized at the bottom of the page. This enables users to test the EDX, email, or fax setup without updating the PO status in the system.
- **Print Copy:** produces 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:** Select this check box to print Standard Comments defined for the PeopleSoft Purchasing business unit on the purchase order upon dispatch. For more information on Standard Comments, see PO.020.810 – Adding/Maintaining Standard Comments.
- **Print PO Item Description:** use this checkbox to print the item description from the Add/Update POs page.

Step	Action
	<ul style="list-style-type: none"> <li>• <b>Print Duplicate:</b> the system will include the word DUPLICATE in the purchase order header.</li> <li>• <b>Print Closed Line Amount:</b> use this checkbox to show closed PO line information on the purchase order. Also, closed line amounts will be included in the PO total amount</li> <li>• <b>Sort By:</b> this dropdown allows users to select whether to sort the lines on the dispatched PO by line number or by Ship To ID.</li> </ul>
11.	Click the <b>Run</b> button. Use the Process Scheduler Request page to enter or update parameters, such as server name and process output format.
12.	Verify the <b>Select</b> checkbox is checked next to the PO BI Publisher Dispatch option.
13.	<p>An important factor to consider when selecting an appropriate output format is the recipient.</p> <p>For example, when users dispatch by email, they may want to select a dispatch output format of PDF or HTML, because these formats are commonly found on user systems. When users dispatch by fax, they may want to consider that most fax software applications are compatible with Postscript - (PS) or PCL - (HP) encoded files.</p> <p>Select the <b>Type</b> and <b>Format</b> for the files to generate:</p> <p>Type refers to where you want the system to send the information. The Types are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Email:</b> PO will transmit to the email address on the user's profile.</li> <li>• <b>File:</b> system will generate a file to the Report.</li> <li>• <b>Printer:</b> System will send to specified printer.</li> <li>• <b>Web:</b> system will generate purchase order file to the Report Manager.</li> </ul> <p>Format refers to how you want the information to generate.</p> <p><b>Note:</b> <i>The most common Format option for POs is PDF.</i></p>
14.	Click the <b>OK</b> button.
15.	Verify a <b>Process Instance</b> number appears. This number helps to identify the process you have run when you check the status.

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Step	Action
16.	Click the <b>Process Monitor</b> link. Use the Process List page to view the status of submitted process requests.
17.	The current status of the process is Initiated. The process is finished when the status is Success. Continue to click the <b>Refresh</b> button until the status is Success.
18.	Verify the <b>Run Status</b> is now <b>Success</b> and the <b>Distribution</b> is <b>Posted</b> .