

DISPATCHING APPROVED PURCHASE ORDERS (For Print and Phone orders only)

A manual process must be initiated in Core on a regular basis to dispatch POs that must be in printed format (ex. must be mailed). Many agencies assign an individual to print the POs on a daily basis for the previous day's work. In some agencies the buyer may be responsible for printing his or her own. The following is a process that should be set up for this purpose. Once the process criteria is defined and saved, it will be available for reuse thereafter.

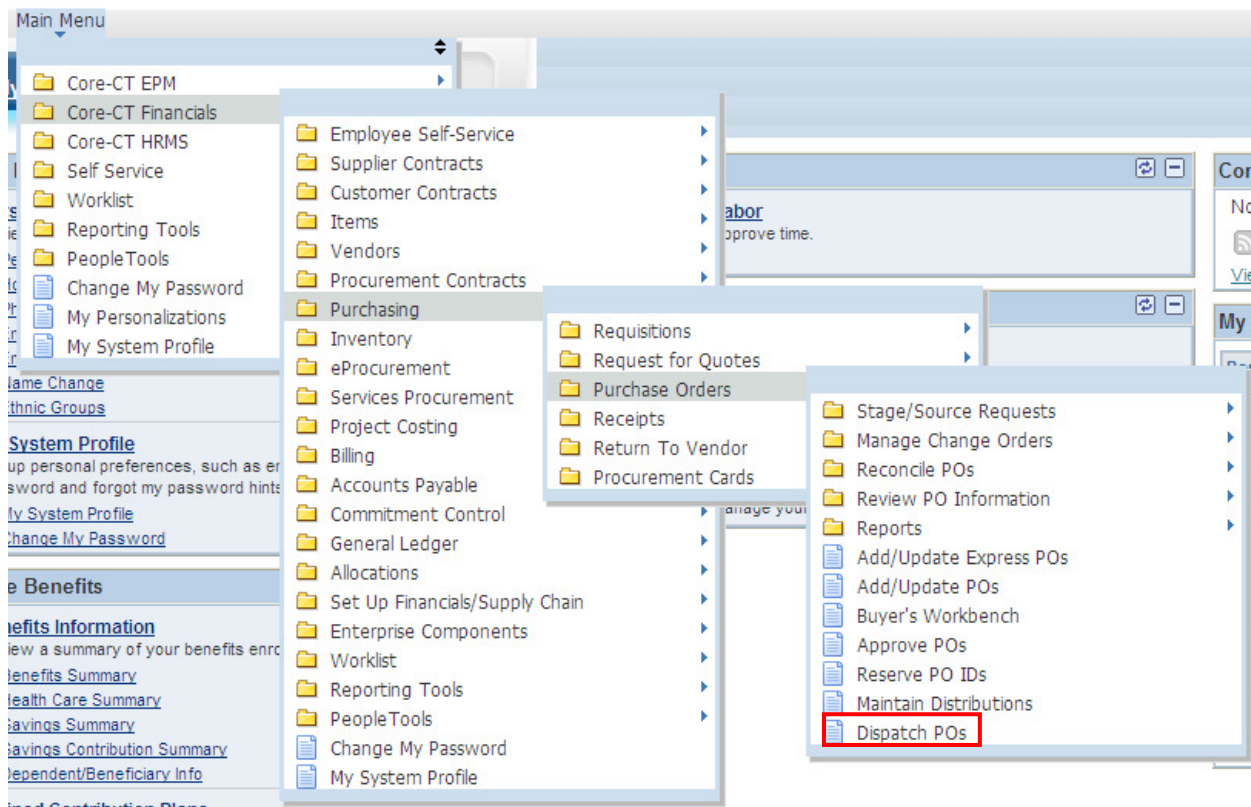
There are 3 pages used to complete this process:

- a. Dispatch Purchase Orders page (setup)
- b. Process Scheduler Request page (run)
- c. Process List page (view/verify results)

Once the process has run successfully, a ".PDF" file will appear in your File List, which you will open in Adobe Acrobat. This is where your PO will appear. You will print them from this file.

****Helpful Hint:** You can run a process successfully, but may not have any PDF files to print. If this happens, review your setup page to be sure the criteria are appropriate.

Navigation: Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Dispatch POs



The first time you dispatch Purchase Orders, you will need to create a new Run Control Id.

The suggested Run Control ID name is: PO_DISPATCH_PRINT

Dispatch Purchase Orders

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Anytime you run it afterwards, you can search for and existing value.

Dispatch Purchase Orders

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Run Control ID:

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-2 of 2 Last

Run Control ID
PO_DISPATCH_PRINT
PS_PO_DISPATCH_DEFAULT

[Find an Existing Value](#) | [Add a New Value](#)

PROCESS REQUEST PARAMETERS

- **Business Unit:** Agency Business Unit
- **PO ID:** (optional if it is only one PO that needs to be dispatched)
- **From Date:** choose date
- **Thru Date:** choose date
- **Buyer:** (optional if you want each buyer to print their own POs, each user needs to set this up)

STATUSES TO INCLUDE

- Only Approved Status should be checked (no entry required if a specific PO is entered)

DISPATCH METHODS TO INCLUDE

- Only Print and Phone should be checked, e-mail and fax are dispatched via batch by CORE (no entry required if a specific PO is entered)

MISCELLANEOUS OPTIONS

- **Chartfields:** Suggested value to select is the Valid Chartfields (default value)
- **Change Orders:** Suggested value to select is Changed and Unchanged Orders (default value)
This will print both POs and Change Orders created and are in Approved Status with a Budget Status of Valid during the From and Thru dates selected.
- **Only Print PO Item Description and Print BU Comments should be selected** (Print BU Comments will default in as selected and will not be available for change).
- **Test Dispatch must NOT be checked.**

Dispatch POs

Run Control ID: PO_DISPATCH_PRINT [Report Manager](#) [Process Monitor](#) Run

Language: English Specified Recipient's

Process Request Parameters		Statuses to Include	
Business Unit:	DOTM1 To: DOTM1	<input type="checkbox"/> Approved	<input type="checkbox"/> Dispatched
PO ID:	0000115542 Select Purchase Order	<input type="checkbox"/> Pending Cancel	
PO Status:	Approved	Dispatch Methods to Include	
Contract SetID:		<input checked="" type="checkbox"/> Print	<input type="checkbox"/> FAX
Contract ID:		<input type="checkbox"/> EDX	<input type="checkbox"/> E-Mail
Release:		<input checked="" type="checkbox"/> Phone	
From Date:		Miscellaneous Options	
Through Date:		*Chartfields:	Valid Chartfields
Vendor ID:		Change Orders:	Changed and UnChanged Orders
Buyer:		<input type="checkbox"/> Print Changes Only	<input checked="" type="checkbox"/> Print BU Comments
Fax Cover Page:		<input type="checkbox"/> Test Dispatch	<input checked="" type="checkbox"/> Print PO Item Description
Template ID:		<input type="checkbox"/> Print Copy	<input type="checkbox"/> Print Duplicate
		Sort By:	Sort by Line Number

Save Notify [Add](#) [Update/Display](#)

If this is the first time you are creating the control, click to save all of the details of this process for reuse.

Click . The Process Scheduler Request page displays.

Process List: Only PO Dispatch/Print should be selected

Click .

Process Scheduler Request

User ID: TurbertJ Run Control ID: PO_DISPATCH_PRINT

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Dispatch/Print	CTPOR305	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	PO Dispatch & Email	PODISP	PSJob	(None)	(None)	Distribution

Note the Process Instance Number.

To view/verify the latest results, click Process Monitor link.

Dispatch POs

Run Control ID: PO_DISPATCH_PRINT [Report Manager](#)

Language: Specified Recipient's **Process Instance: 7030717**

Process Request Parameters		Statuses to Include	
Business Unit:	<input type="text" value="DOTM1"/> To: <input type="text" value="DOTM1"/>	<input type="checkbox"/> Approved	<input type="checkbox"/> Dispatched
PO ID:	<input type="text" value="0000115542"/> Select Purchase Order	<input type="checkbox"/> Pending Cancel	
PO Status:	Approved	Dispatch Methods to Include	
Contract SetID:	<input type="text"/>	<input checked="" type="checkbox"/> Print	<input type="checkbox"/> FAX
Contract ID:	<input type="text"/>	<input type="checkbox"/> EDX	<input type="checkbox"/> E-Mail
Release:	<input type="text"/>	<input checked="" type="checkbox"/> Phone	
From Date:	<input type="text"/>	Miscellaneous Options	
Through Date:	<input type="text"/>	*Chartfields:	<input type="text" value="Valid Chartfields"/>
Vendor ID:	<input type="text"/>	Change Orders:	<input type="text" value="Changed and UnChanged Orders"/>
Buyer:	<input type="text"/>	<input type="checkbox"/> Print Changes Only	<input checked="" type="checkbox"/> Print BU Comments
Fax Cover Page:	<input type="text"/>	<input type="checkbox"/> Test Dispatch	<input checked="" type="checkbox"/> Print PO Item Description
Template ID:	<input type="text"/>	<input type="checkbox"/> Print Copy	<input type="checkbox"/> Print Duplicate
		Sort By:	<input type="text" value="Sort by Line Number"/>

You are viewing a page that shows details of your process.

Click [Refresh](#) periodically to view the latest Run Status results.
Once the **Runs Status** shows **Success**, click [Details](#)

Run status steps are **Queued**, **Initial**, **Processing**, and then **Success** or **No Success**.

If you receive a No Success status, verify your criteria, and rerun the process. If it shows No Success again, call technical support.

Process List | [Server List](#)

Actions

User ID Type Last 1 Days [Refresh](#)

Server Name Instance to

Run Status Distribution Status Save On Refresh

Process List Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	7030717		SQR Report	CTPOR305	TurbertJ	02/27/2013 12:37:09PM EST	Success	Posted	Details

[Go back to Dispatch Purchase Orders](#)

Process List | [Server List](#)

The Process Details page will display.

Click [View Log/Trace](#).

Process Detail

Process	
Instance	7030717
Type	SQR Report
Name	CTPOR305
Description	PO Dispatch/Print
Run Status	Success
Distribution Status	Posted
Run	Update Process
Run Control ID	PO_DISPATCH_PRINT
Location	Server
Server	PSNT
Recurrence	
	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input checked="" type="radio"/> Delete Request <input type="radio"/> Restart Request
Date/Time	Actions
Request Created On	02/27/2013 12:42:54PM EST
Run Anytime After	02/27/2013 12:37:09PM EST
Began Process At	02/27/2013 12:43:07PM EST
Ended Process At	02/27/2013 12:43:19PM EST
	Parameters Transfer Message Log Batch Timings View Log/Trace
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

You should receive three files, including a PDF file containing the PO(s).

Click on the CTPOR305 process instance number.PDF file link. This will open the file in Adobe Acrobat.

Once opened, choose File and then print from the toolbar.

View Log/Trace

Report

Report ID: 5690195 Process Instance: 7030726 [Message Log](#)
 Name: CTPOR305 Process Type: SQR Report
 Run Status: Success

PO Dispatch/Print

Distribution Details

Distribution Node: PRODRPTFTP Expiration Date:

File List

Name	File Size (bytes)	Datetime Created
CTPOR305_7030726.PDF	3,786	02/27/2013 1:35:43.385537PM EST
CTPOR305_7030726.out	18,019	02/27/2013 1:35:43.385537PM EST
SQR_CTPOR305_7030726.log	1,972	02/27/2013 1:35:43.385537PM EST

Distribute To

Distribution ID Type	*Distribution ID
User	TurbertJ

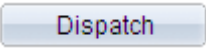
Note: If your File List does not contain a PDF file, there were no POs included in your process.

The process is complete. You can sign out, choose a new page from your navigation menu or select return to go back to Dispatch Purchase Orders.

Should your agency desire an in-house file copy of these PO's, please make the copy utilizing an agency copier.

Optional Method: In Peoplesoft, a PO can be dispatched directly from the header page of the purchase order using the Dispatch button located next to the Dispatch Method field (Method will be set to Print).

This method should only be used if it is critical that the PO be dispatched immediately as each instance creates a new run control.

Click 

Maintain Purchase Order

Purchase Order


Business Unit: DOTM1
 PO ID: 0000115538
 Copy From:

PO Status: Approved ✗
 Budget Status: Valid
 Hold From Further Processing

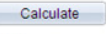
Header

*PO Date: 02/25/2013 [Vendor Search](#)
 *Vendor: [Vendor Details](#)
 *Vendor ID: 0000010009 [SUBURBAN STATIONERS INC](#)
 *Buyer: TurberJ [DOT-TURBERT Julie](#)
 PO Reference:


[Header Details](#) [Activity Summary](#)
[PO Defaults](#) [Document Status](#)
[Requisitions](#) [Add Comments](#)
[PO Activities](#) [Add ShipTo Comments](#)

Receipt Status: Not Recvd
 *Dispatch Method: **Print** 

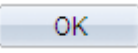
Amount Summary

Merchandise: 2,000.00
 Freight/Tax/Misc.: 0.00 
 Total Amount: 2,000.00 USD
 Encumbrance 2,000.00 USD
 Balance:
 Total P.O. Obligation: 30000.0000 USD

Add Items From
[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Select Lines To Display
 Line: To: 


Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		test 2	20.0000	EA	440000	100.00000	2,000.00	Approved

Uncheck the Test Dispatch Box and click 

Dispatch Options

Dispatch Options

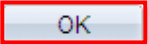
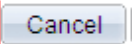
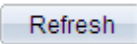
Fax Cover Page:

Server Name: 

*Output Destination Type: WEB

*Output Destination Format: PDF

Test Dispatch
 Print BU Comments
 Print Duplicate on PO
 Print Changes Only
 Print PO Item Description
 Print Copy

The following message will display:

Message

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)

Your request is currently in process. 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.

Selecting Yes will process the dispatch within the PO page. Upon completion, the PO status will change from approved to dispatched. The user must then go to the process monitor and locate the PDF file if a copy needs to be printed (see page 7 for further details).

Selecting No will display the following:

Message

Purchase Order, 0000115538, has been scheduled for dispatch. The process instance number is 7030745. (10208,47)

Please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.

Note the process instance number and click .

Access the process monitor to check the status of the PO:

When the Run Status indicates Success, the PDF file for the PO can be viewed by clicking the Details link and then the View/Trace Log (see page 4-5 above for viewing details).

Process List

Actions

User ID Type Last Days

Server Name Instance to

Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	7030745		SQR Report	CTPOR305	TurbertJ	02/27/2013 3:02:40PM EST	Success	Posted	Details
<input type="checkbox"/>	7030726		SQR Report	CTPOR305	TurbertJ	02/27/2013 1:35:21PM EST	Success	Posted	Details
<input type="checkbox"/>	7030717		SQR Report	CTPOR305	TurbertJ	02/27/2013 12:37:09PM EST	Success	Posted	Details