

PRINTING DISPATCHED PURCHASE ORDERS (For Fax and E-mail orders only)

This is an **optional** process for in-house file copies of Fax or E-Mail Purchase Orders and Change Orders. The steps are similar to the Dispatching Approved Purchase Orders via Print process, but the criteria are different. The following is a process that should be set up for this purpose. Once the process criteria are defined and saved, the run control created will be available for reuse thereafter.

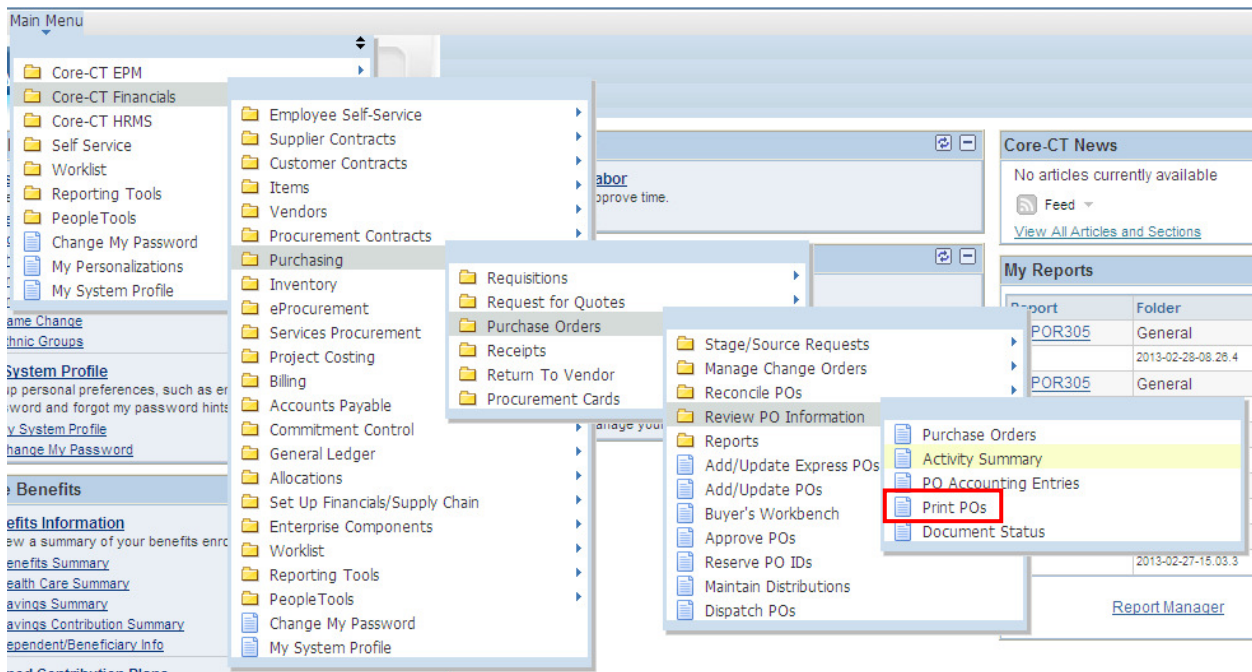
There are 3 pages used to complete this process:

- Dispatch Purchase Orders page (setup)
- Process Scheduler Request page (run)
- 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 > Review PO information > Print POs



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

The suggested Run Control ID name is: PO_DISPATCH_OTHER

Purchase Orders Print

[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.

Purchase Orders Print

Enter any information you have and click Search. Leave fields blank

[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 1-3 of 3 Last

Run Control ID
PO_DISPATCH_OTHER
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 Dispatched Status should be checked (no entry required if a specific PO is entered)

MISCELLANEOUS OPTIONS

- **Hold Status:** Suggested value to select is NOT on Hold (default value)
- **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 Dispatched Status during the From and Thru dates selected.
- **Print PO Item Description** should be selected if not defaulted.

Print POs

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

Language: Specified Recipient's

Report 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"/> Open	<input type="checkbox"/> Pending
Contract SetID:	<input type="text"/>	<input type="checkbox"/> Canceled	<input type="checkbox"/> Completed
Contract ID:	<input type="text"/>	Miscellaneous Options	
Release:	<input type="text"/>	*Hold Status:	<input type="text" value="NOT On Hold"/>
From Date:	<input type="text"/>	*Chartfields:	<input type="text" value="Valid Chartfields"/>
Through Date:	<input type="text"/>	Change Orders:	<input type="text" value="Changed and UnChanged Orders"/>
Vendor ID:	<input type="text"/>	<input type="checkbox"/> Print Changes Only	
Buyer:	<input type="text"/>	<input checked="" type="checkbox"/> Print PO Item Description	
		<input type="checkbox"/> Print Duplicate	
		Number Of Copies:	<input type="text" value="1"/>
		Sort By:	<input type="text" value="Sort by Line Number"/>

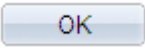
[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

If this is the first time you are creating the control, click [Save](#) to save all of the details of this process for reuse.

Click [Run](#).


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_OTHER

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









Note the Process Instance Number

To view/verify the latest results, click Process Monitor

Dispatch POs

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

Language: Specified Recipient's Process Instance: 7030791

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:	Dispatched	Dispatch Methods to Include	
Contract SetID:	<input type="text"/>	<input checked="" type="checkbox"/> Print	<input checked="" type="checkbox"/> FAX
Contract ID:	<input type="text"/>	<input type="checkbox"/> EDX	<input checked="" 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 checked="" 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

Type

1

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"/>	7030794		SQR Report	CTPOR305	TurbertJ	02/28/2013 8:07:49AM EST	Success	Posted	Details
<input type="checkbox"/>	7030791		PSJob	PODISP	TurbertJ	02/28/2013 8:01:01AM EST	Success	Posted	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

[Go back to Dispatch Purchase Orders](#)

Process List | [Server List](#)

Updated 01/03/13

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The Process Details page will display.

Click [View Log/Trace](#).

Process Detail

Process

Instance	7030794	Type	SQR Report
Name	CTPOR305	Description	PO Dispatch/Print
Run Status	Success	Distribution Status	Posted

Run

Run Control ID PO_DISPATCH_OTHER
 Location Server
 Server PSNT
 Recurrence

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

Date/Time

Request Created On 02/28/2013 8:08:31AM EST
 Run Anytime After 02/28/2013 8:07:49AM EST
 Began Process At 02/28/2013 8:08:55AM EST
 Ended Process At 02/28/2013 8:09:09AM EST

Actions

- [Parameters](#) Transfer
- [Message Log](#)
- Batch Timings
- [View Log/Trace](#)

OK 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: 5690259 Process Instance: 7030794 [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_7030794.PDF	3,706	02/28/2013 8:09:09.021520AM EST
CTPOR305_7030794.out	16,115	02/28/2013 8:09:09.021520AM EST
SQR_CTPOR305_7030794.log	1,948	02/28/2013 8:09:09.021520AM EST

Distribute To

Distribution ID Type	*Distribution ID
User	TurbertJ

[Return](#)

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

The process is complete. Sign out, choose a new page from the left hand navigation menu or select return to go back to Dispatch Purchase Orders if other PO(s) are to be printed.

Optional Method: In Peoplesoft, a PO can be printed directly from the header page of the purchase order using the View Printable Version button located above the Save button.

This method should be used secondary to printing POs from Purchasing as each instance creates a new run control.

Purchase Order

Business Unit: DOTM1
 PO ID: 0000115538
 Copy From:

PO Status: Dispatched ▲ ✖
 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: TurbertJ DOT-TURBERT Julie
 PO Reference:

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

Backorder Status: Not Backordered [Create BackOrder](#)
 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 PO Obligation: 30000.000 USD

Add Items From

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Select Lines To Display

Line: To:

Lines

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

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

View Printable Version

*Go to:

NOTE: Do not use this procedure at this time

As of this printing – this option will cause the purchase order to change status from Dispatched to Approved.

Once the issue has been resolved, this job aide will be updated.

If you need assistance, please call technical support.