



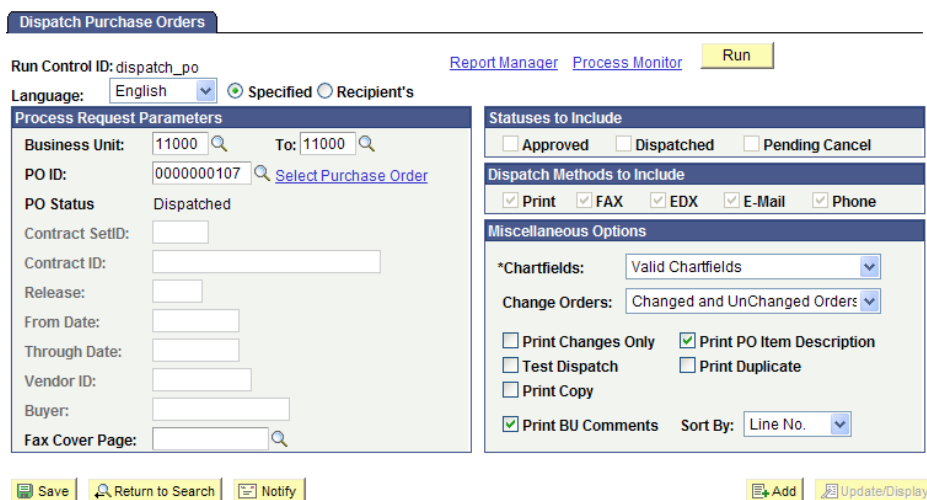


Buyers Checklist Dispatch (Print) a Purchase Order

The following steps will need to be completed the first time you print a purchase order.

Navigation: *Purchasing* → *Purchase Orders* → *Dispatch POs*

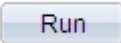
1. Click the **Add a New Value** Tab.
2. Type "DISPATCH_PO". Click .
3. **Business Unit:** Type or Click  to enter your Business Unit.
4. **PO ID:** - Click  to find your Purchase Order.
5. In the **Miscellaneous Options group box**, select the following:
 - **Statuses to Include** = don't check any boxes
 - **Dispatch Methods to Include** = make sure "Print" is checked
 - **Chartfields** = Valid Chartfields
 - **Change Orders** = Changed and Unchanged Orders
 - **Test Dispatch** should **NOT** be checked
 - **Print Copy** = check this box only if you need more than one copy of the PO. If 'Number of Copies' states "1", two copies will print.
 - **Print BU Comments** should be checked
 - **Print PO Item Description** should be checked
6. Select the Save icon . The page should look like this:



7. **Batch Dispatching:** You may want to set up an additional run control ID for dispatching purchase orders in batches. We suggest that buyers set up a run control using their name because the buyer field must be filled in for the batch process to run. There are two different ways to run batch dispatching – use the method that works best for your agency:
 - a. Enter a date range and leave the PO ID blank. The dates will have to be changed each time the process is run. If you check all status boxes or at least include ‘Approved’ and ‘Dispatched,’ you can print all POs within a time frame. See the following example:

- b. Leave the PO ID blank, but you do not have to enter a date range if you just want to pick up only the “Approved” purchase orders. For the example above, you would wipe out the date fields and remove the checkmark by “Dispatched.”

Printing the PO

No matter which Run Control ID you use, click the  icon. On the Process Scheduler Request page, you have two different ways to dispatch the PO.

1. The traditional **PO Dispatch/Print** method. This procedure produces a pdf in your Process Monitor that you can then print or save to your computer for emailing.
 - a. Server Name: Leave blank
 - b. Select PO Dispatch/Print
 - i. Type = Web
 - ii. Format = PDF
 - c. Click OK. See the screen on the next page.

Process Scheduler Request

User ID: BHAMAN@ND.GOV Run Control ID: BATCH

Server Name: Run Date: 05/29/2012

Recurrence: Run Time: 1:32:36PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	PO Dispatch & Email	PODISP	PSJob	(None)	(None)	Distribution
<input checked="" type="checkbox"/>	PO Dispatch/Print	POPO005	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Email	PDF	Distribution

- c. Back on the 'Dispatch Purchase Orders' page, click the [Process Monitor](#) link.
- d. Verify that your user ID appears, and look for the Process Name [POPO005](#).
- e. Click the 'Refresh' button until the run status changes to Success and the distribution status is Posted. Wait 30 seconds in between clicks of the refresh button!
- f. Click the [Details](#) hyperlink, then the [View Log/Trace](#) link.
- g. Click the [POPO005_407xxxx.PDF](#) hyperlink. Print out copies of the PO to send to the vendor.

2. The **PO Dispatch & Email** method. This procedure sends a pdf copy of the PO by email to anyone you select in the Distribution list.

- a. On the Process Scheduler Request page, select PO Dispatch & Email
 - i. Type = Email
 - ii. Format = PDF
 - iii. Next click the Distribution link to the right:

Process Scheduler Request

User ID: BHAMAN@ND.GOV Run Control ID: BATCH

Server Name: Run Date: 05/29/2012

Recurrence: Run Time: 1:45:13PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Dispatch & Email	PODISP	PSJob	Email	PDF	Distribution
<input type="checkbox"/>	PO Dispatch/Print	POPO005	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Email	PDF	Distribution

- b. The only thing you have to worry about on the Distribution Detail page is at the bottom. Your email address will default in, but you can change it to someone else in your agency. You must remember to change these email addresses for subsequent purchase orders, however. See example on next page.

Distribution Detail

Process Name: PODISP
 Process Type: PSJob
 Folder Name:
 Retention Days:

Email Only

Email Subject:
 Email With Log: Email Web Report:

Message Text:

Email Address List:

Distribute To

#ID Type	*Distribution ID		
User	BHAMAN@ND.GOV	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
User	SNEAS@ND.GOV	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

OK Cancel

- c. Click OK to get back to the Process Scheduler Request page, then click OK again to get back to the 'Dispatch Purchase Orders' page.
- d. Click the [Process Monitor](#) link. Verify that your user ID appears, and look for the Process Name [POPO005](#).
- c. Using this option, you do not have to refresh the Process Monitor and wait for your PO to dispatch. You will receive two emails instead: One to say that your process is done and the next one will contain the pdf of your dispatched PO. If you sent the PO only to someone else, then you might want to check your Process Monitor anyway to make sure it looks correct for the other person.
- d. This email procedure will work with batch dispatching too, but remember that ALL the POs will be emailed to the same person(s).

NOTE: If any of the Dispatch processes do not work or the PO prints with an unauthorized signature, go back and check that:

- The PO is budget checked correctly. Review the distribution lines if necessary.
- "Test Dispatch" is not checked on the dispatch run control ID set up.
- If using batch dispatching, were the dates changed?
- Did the PO receive final approval?