



## Dispatching and Printing POs

### Important Notes:

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

## Dispatch and Print POs:

The first time you dispatch Purchase Orders, you will need to create a new run control. The suggested Run Control ID is **PO\_DISPATCH\_PRINT**.

1. Enter **PO\_DISPATCH\_PRINT** in the Run Control ID field (if this is the first dispatch of POs)



The screenshot shows the 'Dispatch Purchase Orders' interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a text input field for 'Run Control ID' containing the value 'PO\_DISPATCH\_PRINT'. A red box highlights this field. Below the input field is an 'Add' button. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

2. Anytime thereafter, utilize the **Find an Existing Value** page to search for the Run Control ID



The screenshot shows the 'Find an Existing Value' search page. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a 'Search Criteria' section with a dropdown menu for 'Run Control ID' set to 'begins with' and a text input field containing 'po'. A red box highlights the dropdown and the input field. Below the search criteria is a 'Search' button and a 'Clear' button. There are also links for 'Basic Search' and 'Save Search Criteria'. Below the search buttons is a 'Search Results' section with a table containing one row with the value 'PO\_DISPATCH\_PRINT'. A red box highlights this row. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

The following information is required for the Run Control:

#### 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 (**PO Date**-remember PO's roll so the first date is 03/01/2013)
- Thru Date: choose date (use today's 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 Through 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.

If this is the first time creating the run control, click **Save** to save all of the details of this process for reuse

3. Click **Run** to display the **Process Scheduler Request** page

4. Under **Process List** select **only PO Dispatch / Print**

5. Click **OK**

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 BI Publisher Dispatch	PO_DISPATCH	BI Publisher	Web	PDF	Distribution

Note: *The process instance number*

6. The view / verify the latest results, click **Process Monitor**

This page shows details of your process.

7. Click **Refresh** periodically to view the latest Run Status results

8. Once Run Status shows Success and the Distribution Status is Posted, click **Details**

Note: *The run status steps are Queued, Initial, Processing, Success, or No Success*

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4215		SQR Report	CTPOR305	HoldenMar	10/11/2016 11:31:24AM EDT	Success	Posted	Details

9. The **Process Details** page displays

10. Click **View Log / Trace**

There should be three files, including a PDF file that contains the PO(s).

11. Click on the **CTPOR305\_(Process Instance Number).PDF** file link. This will open the file in Adobe Acrobat
12. Once opened, choose **File** and then **Print** from the toolbar.

The screenshot shows a web application window titled "View Log/Trace". It contains several sections: "Report" with fields for Report ID (3947), Process Instance (4215), Name (CTPOR305), and Process Type (SQR Report); "Run Status" (Success); "PO Dispatch/Print" section with "Distribution Details" (Distribution Node: PRODRPTFTP, Expiration Date: 11/10/2016); and a "File List" table. The "File List" table has three columns: Name, File Size (bytes), and Datetime Created. The first row, "CTPOR305\_4215.PDF", is highlighted with a red box. Below the table is a "Distribute To" section with fields for Distribution ID Type and User (HoldenMar), and a "Return" button.

Name	File Size (bytes)	Datetime Created
CTPOR305_4215.PDF	8,686	10/11/2016 11:32:41.020293AM EDT
CTPOR305_4215.out	890	10/11/2016 11:32:41.020293AM EDT
SQR_CTPOR305_4215.log	1,799	10/11/2016 11:32:41.020293AM EDT

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

The process is complete. Sign out, choose a new page from the navigation menu, or select return to go back to Dispatch Purchase Orders.

## Optional Method

In PeopleSoft, a PO can be dispatched directly from the header page of the PO using the **Dispatch** button located next to the **Dispatch Method** field. The **Dispatch Method** will be set to print.

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

### 1. Click **Dispatch**

Maintain Purchase Order  
Purchase Order

Business Unit DOTM1  
PO ID 0000168309  
Copy From [ ]

PO Status Approved  
Budget Status Valid  
Hold From Further Processing [ ]

Header

\*PO Date 07/15/2016  
\*Supplier 060887536F.001  
\*Supplier ID 0000012055  
\*Buyer PackardM  
PO Reference 4.19-15(11)

Supplier Search  
Supplier Details  
VALLEY TRANSIT DISTRICT  
DOT-Packard, Mark A

Doc Tol Status Valid  
Receipt Status Not Recvd  
\*Dispatch Method Print  
Dispatch

Amount Summary

Merchandise	24,828.95	USD
Freight/Tax/Misc.	0.00	
Total Amount	24,828.95	
Encumbrance Balance	24,828.95	
Obligation Amount	24,828.95	

Calculate

Add Items From [ ]  
Catalog Item Search

Select Lines To Display [ ]  
Search for Lines Line [ ] To [ ] Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		16-04200041OP ADA	1.0000	EA	78000000	24,828.95000	24,828.95	Approved

View Printable Version  
View Approvals  
\*Go to [ ] More ...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

### 2. Uncheck the **Test Dispatch** box

### 3. Click **OK**

Dispatch Options

Use One Ship To [ ] Ship To 0940000109

Dispatch Options

Fax Cover Page [ ]

Server Name [ ]

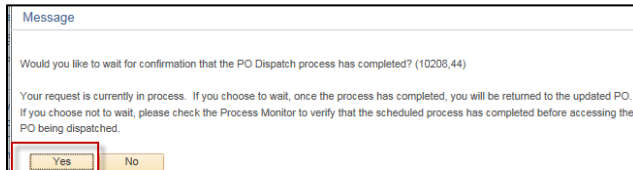
\*Output Destination Type WEB

\*Output Destination Format PDF

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

OK Cancel Refresh

The following message will display:

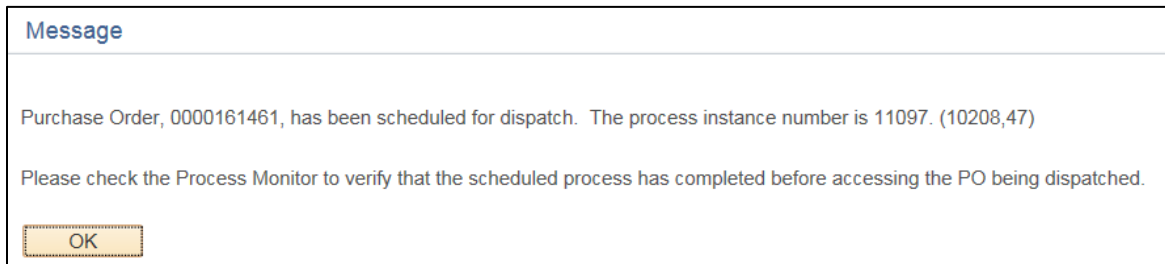


Selecting **Yes** will process the dispatch within the PO page. Upon completion, the PO status will change from **Approved** to **Dispatched**. The user must then go to the **Process Monitor** and locate the **PDF** file if a copy needs to be printed.

Printing directions:

- 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.

Selecting **No** will display the following message



Note the process instance number

4. Click **OK**



5. Access the **Process Monitor** page to check the status of the PO
6. When the run statistic indicates success and Posted, the PDF file for the PO can be viewed by clicking **Details** and then **View / Trace Log**  
See the “Dispatch and Print POs” section for detailed instructions

The screenshot displays the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below the tabs is a search and filter section titled 'View Process Request For'. This section includes fields for 'User ID' (set to 'HoldenMar'), 'Type' (set to 'Last'), 'Days' (set to '1'), and a 'Refresh' button. There are also fields for 'Server', 'Name', 'Instance', and 'to', along with 'Run Status' and 'Distribution Status' dropdown menus, and a checked 'Save On Refresh' option.

Below the search section is a table titled 'Process List'. The table has columns for 'Select', 'Instance', 'Seq.', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. Two rows are visible in the table:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4217		SQR Report	CTPOR305	HoldenMar	10/11/2016 11:53:19AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	4215		SQR Report	CTPOR305	HoldenMar	10/11/2016 11:31:24AM EDT	Success	Posted	<a href="#">Details</a>

Below the table, there is a link 'Go back to Dispatch Purchase Orders' and two buttons: 'Save' and 'Notify'. At the bottom left, there are links for 'Process List' and 'Server List'.

## Print Dispatched POs

In PeopleSoft, a PO can be printed directly from the header page of the purchase order using **View Printable Version** located above **Save**.

Note: You can also **Print** a Dispatched PO by utilizing the **Optional Method** listed above.

Maintain Purchase Order  
Purchase Order

Business Unit DOTM1  
PO ID 0000168309  
Copy From [ ]

PO Status Dispatched  
Budget Status Valid  
 Hold From Further Processing

**Header**

\*PO Date 07/15/2016 Supplier Search  
\*Supplier 060887536F-001 Supplier Details  
\*Supplier ID 0000012055 VALLEY TRANSIT DISTRICT  
\*Buyer PackardM DOT-Packard, Mark A  
PO Reference 4.19-15(11)

Doc Tot Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd  
\*Dispatch Method Print Dispatch

**Amount Summary**

Merchandise	24,828.95	USD
Freight/Tax/Misc.	0.00	
<b>Total Amount</b>	<b>24,828.95</b>	
Encumbrance Balance	24,828.95	
Obligation Amount	24,828.95	

**Add Items From** Catalog Item Search

**Select Lines To Display** Search for Lines Line [ ] To [ ] Retrieve

**Lines**

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

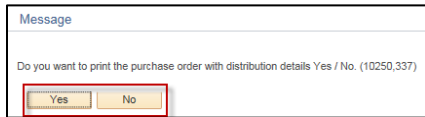
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		16-04200041OP ADA Replaces PO 156046 which was accidentally closed by CORE.	1.0000	EA	78000000	24,828.95000	24,828.95	Approved

**View Printable Version**

\*Go to [ ] More ...

Save Return to Search Notify Refresh Add Update/Display

You will receive the following message:



The image shows a screenshot of a message dialog box. The title bar reads "Message". The main text asks, "Do you want to print the purchase order with distribution details Yes / No. (10250,337)". At the bottom, there are two buttons: "Yes" and "No". The "Yes" button is highlighted with a red border.

1. Click **Yes** to view a PO with the distribution, accounting entries, for the item  
OR

Click **No** to view a PO without the distribution, accounting entries, for the item

2. A new window will open with a PDF copy of the PO

Sample PO with distribution details:

### Purchase Order

Page: 1 of 1

**Dept. of Transportation**  
Accounts Payable  
PO Box 317546  
Newington CT 06131-7546  
United States

Dispatched		Dispatch Via Print	
Purchase Order	Date	Revision	
DOTM1-0000168309	07-15-2016		
Payment Terms	Freight Terms	Ship Via	
Due Now	FOB Destination, Frt Prepaid	Common	
Buyer	Phone	Currency	
DOT-Packard, Mark A	860/594-2809		

Supplier: 0000012055  
VALLEY TRANSIT  
DISTRICT  
41 MAIN ST  
DERBY CT 06418  
United States

Ship To: 2800 Berlin Turnpike  
Pub Trans/Prop Fac  
Svcs/ROW Financial  
Support  
Newington CT 06111  
United States

Attention: Not Specified

Bill To: Accounts Payable  
PO Box 317546  
Newington CT 06131-7546  
United States

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1 - 1	16-042000410P ADA Replaces PO 156046 which was accidentally closed by CORE.		1.00	EA	24828.95	24828.95	07/15/2016

DIST: 1

Status	Percentage	PO Qty	Amount
Open	100.0000	1.0000	24828.950

GL/Unit	Account	Fund	Dept	Program	Class
STATE	52033	1200	DOT5793	32003	12378
		1	1		

PCBusUnit	Project	Activity	SourceTy
DOTM	DOT0420004	TT0000	TT426
	10P		

BaseAmt	BaseCurrency	Currency	Location	Comsigned
24828.950	USD	USD	ACORE	N

<b>Schedule Total</b>	24828.95
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Contract ID: 12DOT0007AA	Contract Line: 21	Release: 27	Category Line: 0
Total Amount: 0.000	Amount Open: 0.000	Quantity Open: 0.0000	
Total Quantity: 0.00			

<b>Item Total</b>	24828.95
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<b>Total PO Amount</b>	24828.95
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Unauthorized

Sample PO without distribution details:

Purchase Order		Page: 1 of 1													
<b>Dept. of Transportation</b> Accounts Payable PO Box 317546 Newington CT 06131-7546 United States		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Dispatched</th> <th colspan="2" style="text-align: left;">Dispatch Via Print</th> </tr> </thead> <tbody> <tr> <td>Purchase Order DOTM1-0000168309</td> <td>Date 07-15-2016</td> <td>Revision</td> </tr> <tr> <td>Payment Terms Due Now</td> <td>Freight Terms FOB Destination, Frt Prepaid</td> <td>Ship Via Common</td> </tr> <tr> <td>Buyer DOT-Packard, Mark A</td> <td>Phone 860/594-2809</td> <td>Currency</td> </tr> </tbody> </table>		Dispatched	Dispatch Via Print		Purchase Order DOTM1-0000168309	Date 07-15-2016	Revision	Payment Terms Due Now	Freight Terms FOB Destination, Frt Prepaid	Ship Via Common	Buyer DOT-Packard, Mark A	Phone 860/594-2809	Currency
Dispatched	Dispatch Via Print														
Purchase Order DOTM1-0000168309	Date 07-15-2016	Revision													
Payment Terms Due Now	Freight Terms FOB Destination, Frt Prepaid	Ship Via Common													
Buyer DOT-Packard, Mark A	Phone 860/594-2809	Currency													
<b>Supplier:</b> 0000012055 VALLEY TRANSIT DISTRICT 41 MAIN ST DERBY CT 06418 United States	<b>Ship To:</b> 2800 Berlin Turnpike Pub Trans/Prop Fac Svcs/ROW Financial Support Newington CT 06111 United States	<b>Attention:</b> Not Specified	<b>Bill To:</b> Accounts Payable PO Box 317546 Newington CT 06131-7546 United States												
<b>Tax Exempt?</b> Y <b>Tax Exempt ID:</b> 066000798DOT <b>Replenishment Option:</b> Standard															
Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date								
1 - 1	16-042000410P ADA Replaces PO 156046 which was accidentally closed by CORE.		1.00	EA	24828.95	24828.95	07/15/2016								
<b>Schedule Total</b>						24828.95									
Contract ID: 12DOT0007AA Total Amount: 0.000 Total Quantity: 0.00				Contract Line: 21	Release: 27	Category Line: 0									
		Amount Open: 0.000		Quantity Open: 0.0000											
<b>Item Total</b>						24828.95									
<b>Total PO Amount</b>						24828.95									
<div style="border: 1px solid red; display: inline-block; padding: 2px 10px;">Unauthorized</div>															

Note for **View Printable Versions:**

1. *This process will not work with closed POs*
2. *The PDF will be an unauthorized copy of the PO*
3. *Both versions will show the Contract ID and the Purchasing Authority – if applicable*