

Dispatch Purchase Orders by Batch

Quick Tip: Dispatch Purchase Order by Batch

Currently users dispatch Purchase Orders one at a time. This can take from 3-5 minutes per Purchase Order. If a User dispatches 50 in a given day they would spend between 2.5 – 4 hours a day on dispatching Purchase Orders alone.

PeopleSoft offers users the ability to dispatch Purchase Orders in Batches. In the time it takes a user to dispatch one Purchase Order they could dispatch 50, saving between 2-3.5 hours a day.

Navigation:

Purchasing>Purchase Orders>Reconcile Pos>Reconciliation Workbench

Reconciliation WorkBench
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

Business Unit:

=

58000

WorkBench ID:

begins with

Description:

begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Find an Existing Value

Add a New Value

Input the Workbench ID and click the

Search

 button.



Dispatch Purchase Orders by Batch



Filter Options



Business Unit: 58000 **WorkBench ID:** DISATCHPO
Description: DISPATCH PURCHASE ORDERS



Enter search criteria and click on Search. Leave blank for all values.



Search Criteria


Purchase Order:  **To:** 


PO Date:  **To:** 


Activity Date:  **To:** 


Due Date:  **To:** 


Request BU:  **Requisition ID:** 


Vendor ID: 


Item ID: 

Buyer: 

Contract SetID: 

Contract ID: 

Release Number: 

GPO ID: 

GPO Contract:

Status

☐ Open ☒ **Approved** ☐ Dispatched ☐ Cancelled

Receiving

☐ Required ☐ Not Required
☐ Not Received ☐ Partially Received ☐ Fully Received

Matching

☐ Required ☐ Not Required
☐ None ☐ Partial Match ☐ Fully Matched

Encumbrance

☐ Open Encumbrances

Input your Buyer ID and click the Approved Radio box located in the Status section.

Dispatch Purchase Orders by Batch

Status

☐ Open ☒ **Approved** ☐ Dispatched ☐ Cancelled

Receiving

☐ Required ☐ Not Required

☐ Not Received ☐ Partially Received ☐ Fully Received

Matching

☐ Required ☐ Not Required

☐ None ☐ Partial Match ☐ Fully Matched

Encumbrance

☐ Open Encumbrances

Chartfields

GL Unit	Account	Sub-Account	Fund Type	Class-Funding	Dept	Bud Ref	CFDA#	Program	Project
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Return to Reconciliation WorkBench](#)

Click the button.

Reconciliation WorkBench

Business Unit: 58000 WorkBench ID: DISATCHPO

Description:

Select POs for Further Processing

List of Purchase Orders [Customize](#) [Find](#) [View All](#) [Download](#) First 1-10 of 20 Last

Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Vendor ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 5809000532		Approved	N	02/26/2004	06/27/2005	0000069356	Nancy Boydston (580)	Standard			
<input checked="" type="checkbox"/> 5809000766		Approved	N	04/08/2004	08/04/2006	0000059443	Theresa Howell	Standard	1		
<input checked="" type="checkbox"/> 5809001270		Approved	N	06/26/2004	11/18/2005	0000069633	Keith Hicks	Standard	1		
<input checked="" type="checkbox"/> 5809001352		Approved	N	07/07/2004	11/19/2005	0000066849	Keith Hicks	Standard	4		
<input checked="" type="checkbox"/> 5809002020		Approved	N	11/18/2004	11/29/2005	0000056253	Gwen Martin	Standard	1		
<input checked="" type="checkbox"/> 5809002589		Approved	N	04/19/2005	12/27/2005	0000071553	Cathye Vester	Standard	1		
<input checked="" type="checkbox"/> 5809002747		Approved	N	05/18/2005	11/13/2005	0000068366	Marti Anderson	Standard	3		
<input checked="" type="checkbox"/> 5809002942		Approved	N	06/30/2005	07/31/2006	0000041355	Gary Rowland (580)	Standard	2		
<input checked="" type="checkbox"/> 5809003233		Approved	N	08/23/2005	07/05/2006	0000077976	Keith Hicks	Standard	1		
<input checked="" type="checkbox"/> 5809003321		Approved	N	09/02/2005	02/15/2006	0000068165	Marti Anderson	Standard	1		

☒ [Select All](#) ☐ [Clear All](#)

Action:

Go To: [Set filter options](#) [Process Request Options](#) [Process Monitor](#) [View Processing Results](#)

Click the [View All](#) link to review all eligible Purchase Orders.

Dispatch Purchase Orders by Batch

- You can deselect a Purchase Order from being dispatched by clicking the Radio Box ☒ located to the left of the Purchase Order number.

Click the **Other** tab.

Reconciliation WorkBench

Business Unit: 58000 WorkBench ID: DISATCHPO

Description: DISPATCH PURCHASE ORDERS

Select POs for Further Processing

List of Purchase Orders [Customize](#) | [Find](#) | [View 10](#) | [Download](#) First 1-20 of 20 Last

Purchase Order	Doc Status	PQ Status	Hold	Receipt Status	Backorder Status	Budget Status	NP Budget Status	Document Tolerance Status	Go To PO Activity Summary	Edit the PO?
<input checked="" type="checkbox"/> 5809000532		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809000766		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809001270		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809001352		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809002020		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809002589		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809002747		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809002942		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003233		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003321		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003398		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003473		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003510		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003517		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809003930		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809004208		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809004379		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809004580		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> 5809004689		Approved	N	Not Recvd	None	Valid	Valid	Valid		
<input checked="" type="checkbox"/> Y008715		Approved	N	Not Recvd	None	Valid	Valid	Valid		

☒ [Select All](#) ☐ [Clear All](#)

Action: [Approve](#) [Unapprove](#) [Cancel](#) [Close](#) [Dispatch](#) [Preview](#)

- The Budget Status must equal Valid or you need to deselect the Purchase Order.
- You can go to the Maintain Purchase Order by clicking the icon located to the far right of the Purchase Order number

When you are ready to dispatch the Purchase Order click the [Dispatch](#) button at the bottom of the page.

Dispatch Purchase Orders by Batch

Reconciliation WorkBench

Processing Results

Business Unit: 58000 **WorkBench ID:** DISATCHPO

Description:

Select POs for Further Processing

Not Qualified [View All](#)

PO ID	Log
<input type="checkbox"/>	

Qualified [Find](#) | [View All](#) | [Download](#) 1-9 of 20

PO ID	Line	Sched	Distrib	Line
5809000532				
5809000766				
5809001270				
5809001352				
5809002020				
5809002589				
5809002747				
5809002942				
5809003233				

☒ [Select All](#) ☐ [Clear All](#)

Proceed: [Return to Reconciliation WorkBench](#)

[Notify](#)

This will take you to the Processing Results page. There are two sections:

- **Not Qualified**
 - You can identify the reason the Purchase Order is not qualified to be dispatched by clicking the icon located to the right of the Purchase Order not qualified.
- **Qualified**
 - Identifies the Purchase Orders that are qualified to be dispatched.
 - Click the button to the right of the Purchase Order if you do not want to dispatch it.
 - Be sure to click the [View All](#) link to review all Purchase Orders Qualified to be dispatched.

When ready click the button to continue with dispatching the Purchase Order.

Dispatch Purchase Orders by Batch

Continue to Dispatch POs. (10224,41)

Yes

No

Click the **Yes** button to continue, click the **No** to return back to the previous page without dispatching the Purchase Orders.

Reconciliation WorkBench

Business Unit: 58000 WorkBench ID: DISATCHPO

Description: DISPATCH PURCHASE ORDERS

Select POs for Further Processing

List of Purchase Orders											
Customize Find View 10 Download First 1-20 of 20 Last											
Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Vendor ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 5809000532		Approved	N	02/26/2004	06/27/2005	0000069356	Nancy Boydston (580)	Standard			
<input checked="" type="checkbox"/> 5809000766		Approved	N	04/08/2004	08/04/2006	0000059443	Theresa Howell	Standard	1		
<input checked="" type="checkbox"/> 5809001270		Approved	N	06/26/2004	11/18/2005	0000069633	Keith Hicks	Standard	1		
<input checked="" type="checkbox"/> 5809001352		Approved	N	07/07/2004	11/19/2005	0000066849	Keith Hicks	Standard	4		
<input checked="" type="checkbox"/> 5809002020		Approved	N	11/18/2004	11/29/2005	0000056253	Gwen Martin	Standard	1		
<input checked="" type="checkbox"/> 5809002589		Approved	N	04/19/2005	12/27/2005	0000071553	Cathye Vester	Standard	1		
<input checked="" type="checkbox"/> 5809002747		Approved	N	05/18/2005	11/13/2005	0000068366	Marti Anderson	Standard	3		
<input checked="" type="checkbox"/> 5809002942		Approved	N	06/30/2005	07/31/2006	0000041355	Gary Rowland (580)	Standard	2		
<input checked="" type="checkbox"/> 5809003233		Approved	N	08/23/2005	07/05/2006	0000077976	Keith Hicks	Standard	1		
<input checked="" type="checkbox"/> 5809003321		Approved	N	09/02/2005	02/15/2006	0000068165	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> 5809003398		Approved	N	09/20/2005	06/23/2006	0000072246	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> 5809003473		Approved	N	10/03/2005	02/28/2006	0000076796	Carol Morris (580)	Standard	1		
<input checked="" type="checkbox"/> 5809003510		Approved	N	10/13/2005	05/25/2006	0000068366	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> 5809003517		Approved	N	10/14/2005	06/27/2006	0000068366	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> 5809003930		Approved	N	02/03/2006	02/15/2006	0000068165	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> 5809004208		Approved	N	04/11/2006	04/12/2006	0000016942	Gwen Martin	Standard	1		
<input checked="" type="checkbox"/> 5809004379		Approved	N	05/23/2006	05/24/2006	0000072648	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> 5809004580		Approved	N	06/29/2006	06/29/2006	0000073373	Keith Hicks	Standard	1		
<input checked="" type="checkbox"/> 5809004689		Approved	N	07/21/2006	07/25/2006	0000068165	Marti Anderson	Standard	1		
<input checked="" type="checkbox"/> Y008715		Approved	N	07/12/2001	12/27/2005	0000075261	Theresa Johnson (580)	Standard	8		

☒ Select All ☐ Clear All

Action: **Approve** **Unapprove** **Cancel** **Close** **Dispatch** **Preview**

Dispatch Purchase Orders by Batch

Print Purchase Orders Dispatched

Navigation:

People Tools>Process Schedule>Process Monitor

Process List [Server List](#)

View Process Request For

User ID: Type: Last: Days
Server: Name: Instance: to
Run Status: Distribution Status: ☒ Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | First 1-4 of 4 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3728821		PSJob	PODISP	RMAXWELL	12/04/2006 10:47:30AM CST	Success	Posted	Details
<input type="checkbox"/>	3728818		PSJob	PODISP	RMAXWELL	12/04/2006 10:16:17AM CST	Success	Posted	Details
<input type="checkbox"/>	3728815		PSJob	PODISP	RMAXWELL	12/04/2006 10:13:53AM CST	Success	Posted	Details
<input type="checkbox"/>	3728281		Crystal	OCPO0378	RMAXWELL	11/20/2006 2:17:15PM CST	Success	Posted	Details

[Process List](#) | [Server List](#)

Click on the [PODISP](#) link.


Dispatch Purchase Orders by Batch


Process Detail


Process Name: PODISP Refresh

Main Job Instance: 3728821

Left | Right

 [3728821 - PODISP Success](#)

 [3728822 - POPO005 Success](#)

 [3728823 - PO PO EMAIL Success](#)

Return

Click on the middle link.

Dispatch Purchase Orders by Batch

Process Detail

Process	
Instance: 3728822	Type: SQR Process
Name: POP0005	Description: Single PO Dispatch/Print
Run Status: Success	Distribution Status: Posted

Run	Update Process
Run Control ID: RMAXWELL	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server:	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 12/04/2006 10:47:33AM CST	Parameters Transfer
Run Anytime After: 12/04/2006 10:47:30AM CST	Message Log
Began Process At: 12/04/2006 10:47:51AM CST	Batch Timings
Ended Process At: 12/04/2006 10:48:28AM CST	View Log/Trace

OK

Cancel

Click on the [View Log/Trace](#) link.

Dispatch Purchase Orders by Batch

[View Log/Trace](#)
Report

Report ID: 1848868 **Process Instance:** 3728822 [Message Log](#)
Name: POPO005 **Process Type:** SQR Process
Run Status: Success

Single PO Dispatch/Print
Distribution Details

Distribution Node: FSSTGU **Expiration Date:** 12/18/2006

File List


Name	File Size (bytes)	Datetime Created
Message Log	1,633	12/04/2006 10:48:28.000000AM CST
popo005_3728822.PDF	75,707	12/04/2006 10:48:28.000000AM CST
Trace File	400,549	12/04/2006 10:48:28.000000AM CST

Distribute To

Distribution ID Type	Distribution ID
User	RMAXWELL

[Return](#)

Click on the PDF link. This link will show all the purchase orders that have been selected to dispatch.



Purchase Order

Department of Central Services
 DEPARTMENT OF CENTRAL SERVICES
 CENTRAL PURCHASING DIVISION
 2401 N LINCOLN, WILL ROGERS BLDG, STE 116
 OKLAHOMA CITY OK 73105

Vendor: 0000069356
 ACCREDITATION COUNCIL FOR GRADUATE MEDIC
 515 N STATE ST
 CHICAGO IL 60610

Ship To: 58020
 DEPARTMENT OF CENTRAL SERVICES
 CONSTRUCTION AND PROPERTIES DIVISION
 2401 N LINCOLN, WILL ROGERS BLDG, STE 106
 OKLAHOMA CITY OK 73105

Bill To: DEPARTMENT OF CENTRAL SERVICES
 ACCOUNTING DIVISION
 PO BOX 53488
 OKLAHOMA CITY OK 731123488

Dispatch via Print

Purchase Order	Date	Revision	Page
5809000532	02/26/2004		1

Payment Terms	Freight Terms	Ship Via
0 Days		COMMON

Buyer	Phone	Currency
Nancy Boydston (580)	405/522-0046	USD

Tax Exempt? Y **Tax Exempt ID:** 736017987

Line-Sch	Item Id	Description	Quantity	UOM	PO Price	Extended Amt	Due Date
Total PO Amount							0.00

COMMENTS: