University of Wisconsin System
SFS Business Process
PO.1.01 – Purchase Order Creation

Contents

Purchase Order Creation Process Overview

Purchase Orders (PO) in SFS represent orders for goods or services to vendors and carry an associated encumbrance value that represents the remaining purchase order value. Typically, a request is made to a vendor for a good or service and the buyer reviews the request. Once the Buyer verifies compliance to policies, they are responsible for creating the PO in SFS, budget checking it, and dispatching it to the vendor for fulfillment.

PLEASE NOTE – With the 9.2 upgrade Vendors are now called Suppliers. This documentation will use the new naming convention going forward.

Some institutions migrated to the online requisitioning tool eProcurement with the SFS 9.2 upgrade. EProcurement allows the requester to create a requisition online and route it electronically for approval. Once the requisition is created and approved, it is sourced manually or automatically to a Purchase Order, per the institution's requirements. Instructions on Creating, Approving, and Sourcing an eProcurement requisition to a Purchase Order are located in the eProcurement section of the Documentation and Training website. https://www.wisconsin.edu/sfs/documentation-training/

With the last upgrade, some institutions requested PO workflow functionality. This decentralized the PO entry process to the requester and included an ad hoc electronic workflow approval to the Buyer. With the availability of eProcurement in 9.2, some institutions will no longer need this functionality, because the approval workflow will be on the requisition side. For those PO workflow institutions that did not migrate to eProcurement or are still choosing to use workflow functionality, information regarding PO workflow processing can be obtained, by referencing the PO Approval Workflow Processing document in the Purchasing section of the SFS Documentation and Training website.

Still Available in 9.2

1) Email Dispatch of Purchase Orders using electronic signatures. Institutions interested in using electronic signatures should contact UWSA Problem Solvers uwsaproblemsolvers@uwsa.edu

2) Supplier and Buyer copies of dispatched purchase orders
    a. Regardless of the type of dispatch, both the Buyer and Supplier copy of the dispatched PO will be available in the Process Monitor or Report Manager.

This document covers Regular and Express PO entry and the subsequent steps to PO Dispatch. The Appendix includes instructions on creating POs using the "Copy From" option. The "Copy From" instructions are the same for Regular and Express PO entry.

9.2 New Functionality

I. Fluid

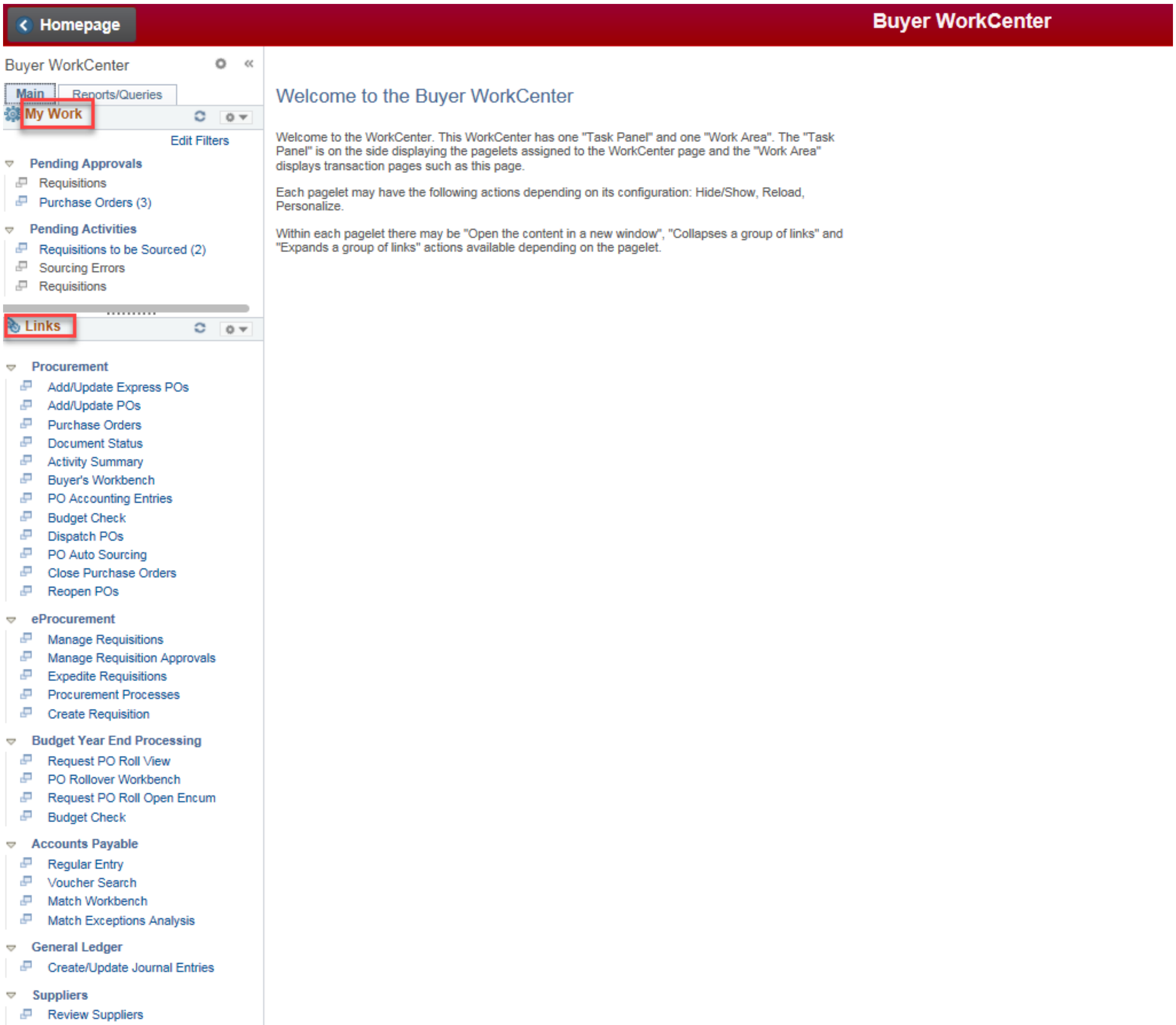
9.2 introduces new terminology called Fluid. Fluid involves the use of Tiles, which represent events you can complete in SFS, per your security and authorization level. The Tiles will be displayed on your Homepage when you log into SFS. Most of the tiles are module specific. The Work Center for Purchasing is called the Buyer WorkCenter. It will be displayed on your homepage, but can also be accessed through the below navigation.

***Navigator**: Purchasing > Buyer WorkCenter*

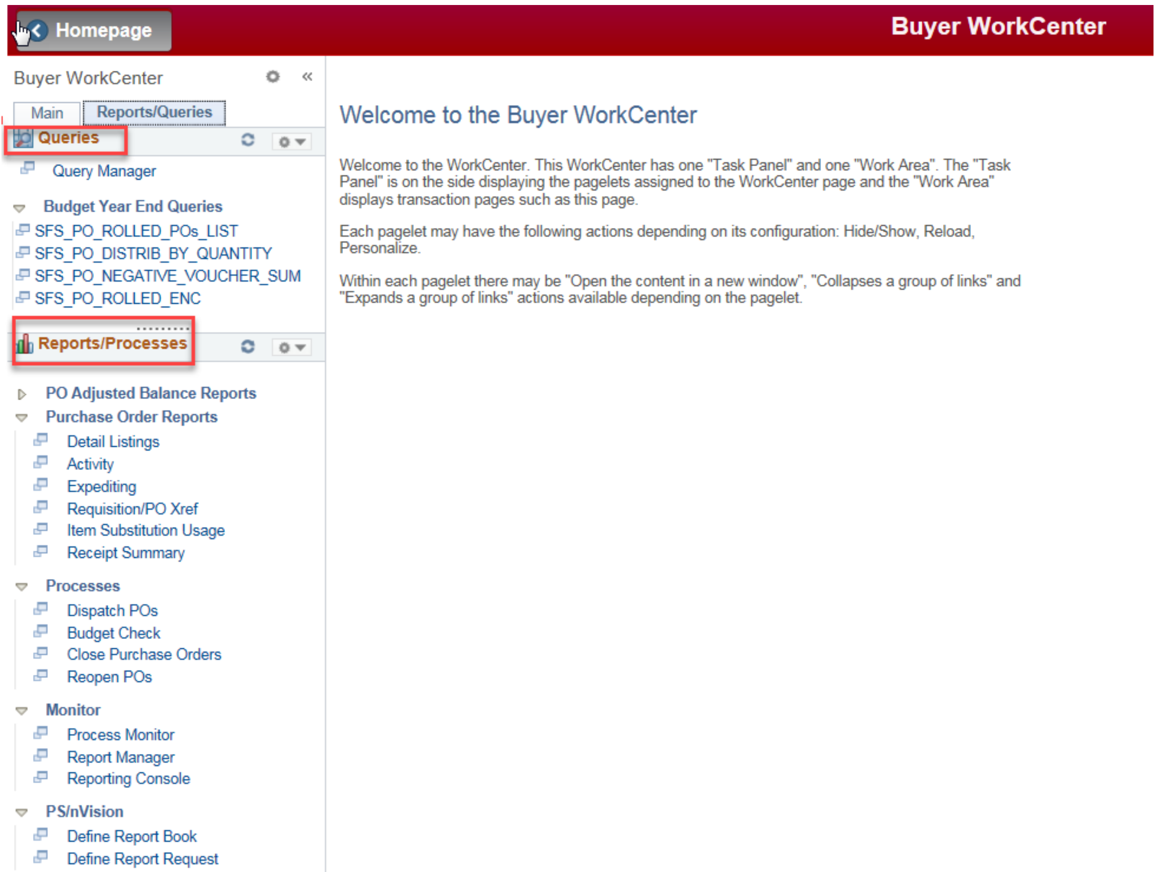
II. Buyer WorkCenter

The Buyer Work Center is a “one stop shop” for all Purchasing related transactions. It provides a centralized component which allow users to access a variety of alerts, pages, processes, queries and reports without using navigation.

The Main tab contains a “My Work” section. It lists all the items requiring your attention, i.e. Pending Approvals, Pending Activities, and Alerts. It also contains a Links section, which provides direct access/short cuts to all the pages you will need or use to handle purchase order activities. No need to navigate to pages like Add/Update POs, Add/Update Express POs, Buyer’s Workbench, etc. A link to these pages will be on the Buyer WorkCenter page.


Homepage
Buyer WorkCenter
Buyer WorkCenter
Main
Reports/Queries
My Work
Edit Filters
Pending Approvals
Requisitions
Purchase Orders (3)
Pending Activities
Requisitions to be Sourced (2)
Sourcing Errors
Requisitions
Links
Procurement
Add/Update Express POs
Add/Update POs
Purchase Orders
Document Status
Activity Summary
Buyer's Workbench
PO Accounting Entries
Budget Check
Dispatch POs
PO Auto Sourcing
Close Purchase Orders
Reopen POs
eProcurement
Manage Requisitions
Manage Requisition Approvals
Expedite Requisitions
Procurement Processes
Create Requisition
Budget Year End Processing
Request PO Roll View
PO Rollover Workbench
Request PO Roll Open Encum
Budget Check
Accounts Payable
Regular Entry
Voucher Search
Match Workbench
Match Exceptions Analysis
General Ledger
Create/Update Journal Entries
Suppliers
Review Suppliers
Welcome to the Buyer WorkCenter
Welcome to the WorkCenter. This WorkCenter has one "Task Panel" and one "Work Area". The "Task Panel" is on the side displaying the pagelets assigned to the WorkCenter page and the "Work Area" displays transaction pages such as this page.
Each pagelet may have the following actions depending on its configuration: Hide/Show, Reload, Personalize.
Within each pagelet there may be "Open the content in a new window", "Collapses a group of links" and "Expands a group of links" actions available depending on the pagelet.

The Reports/Queries tab on the Buyer WorkCenter contains a Queries and Reports/Processes section.



The Queries section provides links to Query Manager and Budget Year End Queries. The Query Manager link will take you to the page where you create queries and access public & private queries. The Budget Year End Queries section provides direct access to the queries accessed during the PO Fiscal Year End Rollover process.

The Reports/Processes Section provides links to various processes and reports, like the POADJBAL reports, Purchase Order Delivered Reports, Various Processes and Monitor Pages, and the Report Manager.

Although you will have access to all these pages/processes through the Buyer Work Center, you can still manually navigate to them using the Navigator. You can also establish Favorites.

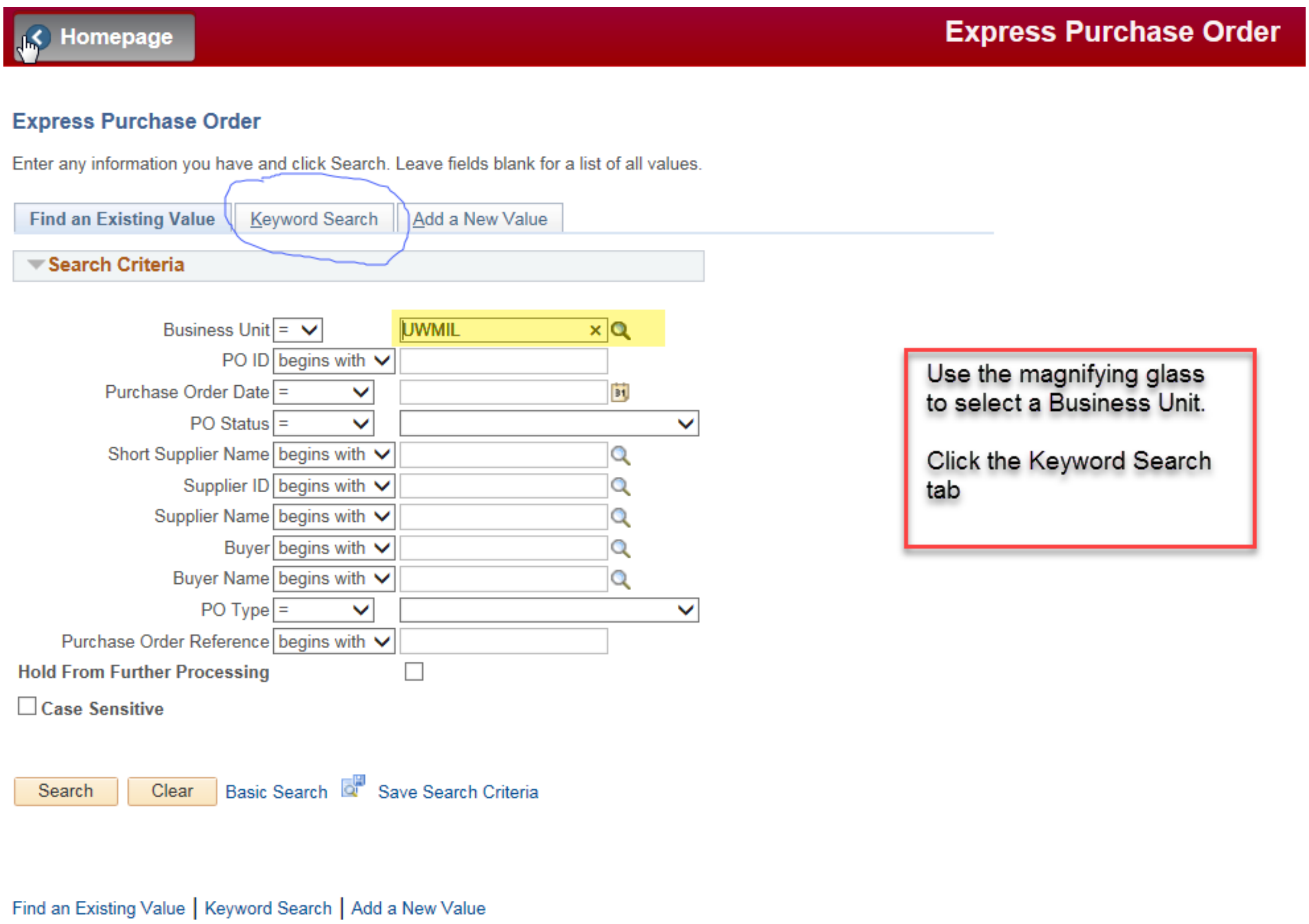
This documentation will include the navigation to all pages and processes.

III. Keyword Search (New Feature in 9.2)

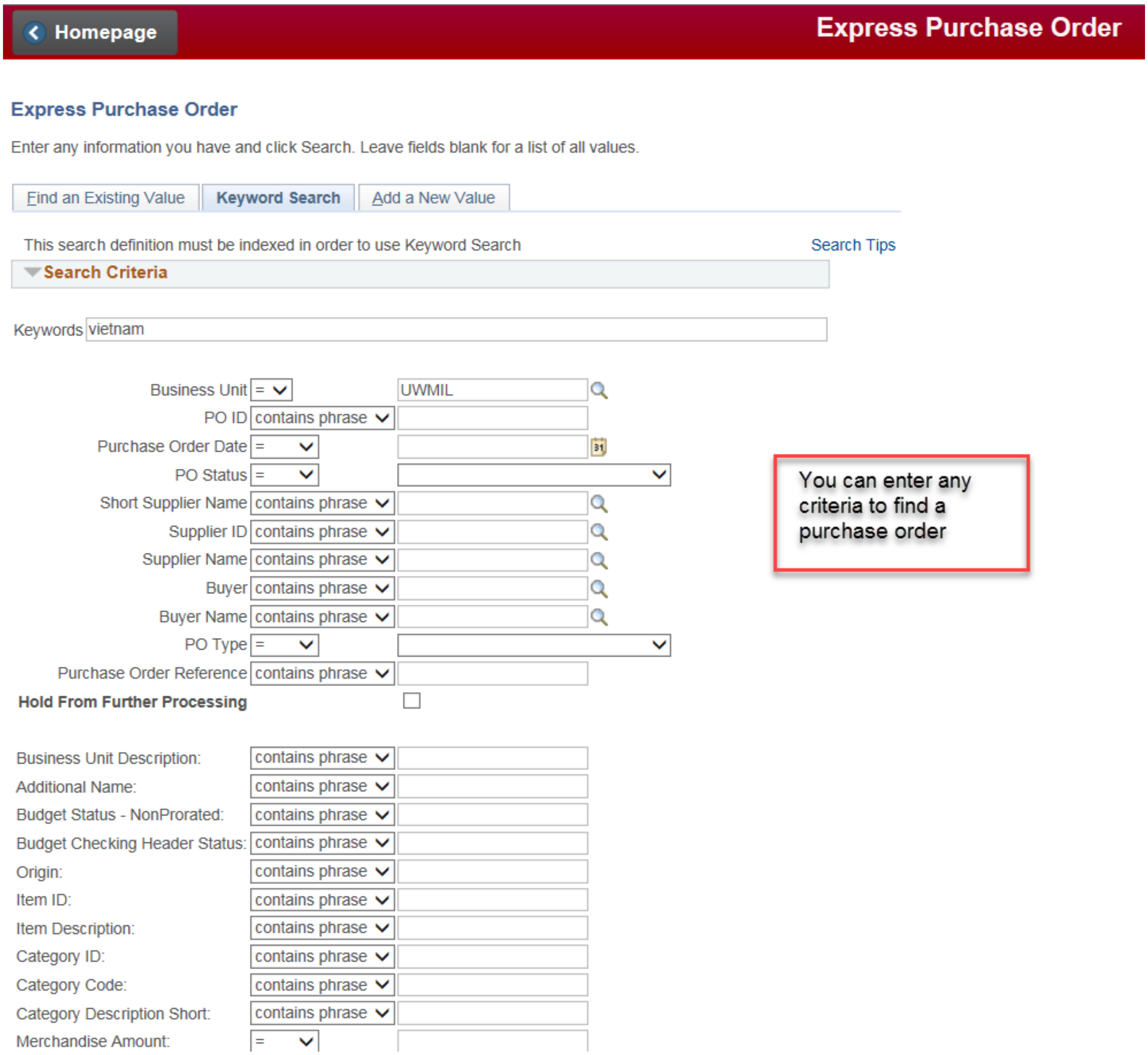
Keyword Search is a new feature in 9.2 on the Add/Update Express and Add/Update pages. It is a new tab, which allows you to search for a PO using more detailed criteria.

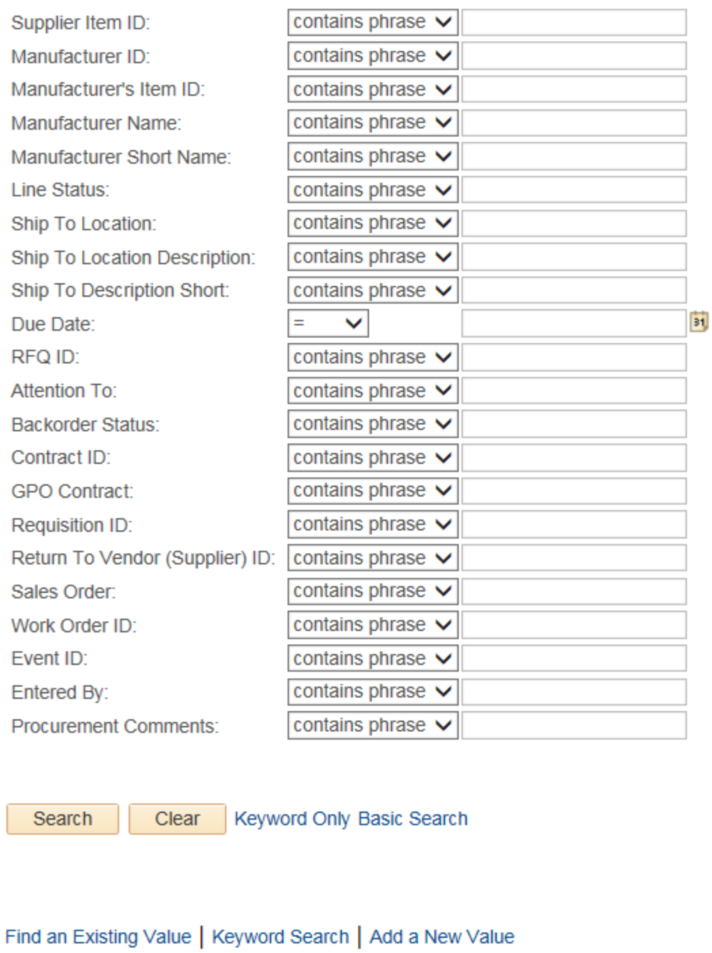
Although this documentation includes the Keyword Search tab, it is not available at this time. This functionality has been road mapped and will be available at a later date.

Navigation
Navigator: *Purchasing > Purchase Orders > Add/Update POs or Add/Update Express POs*



The Keyword Search screen will appear.





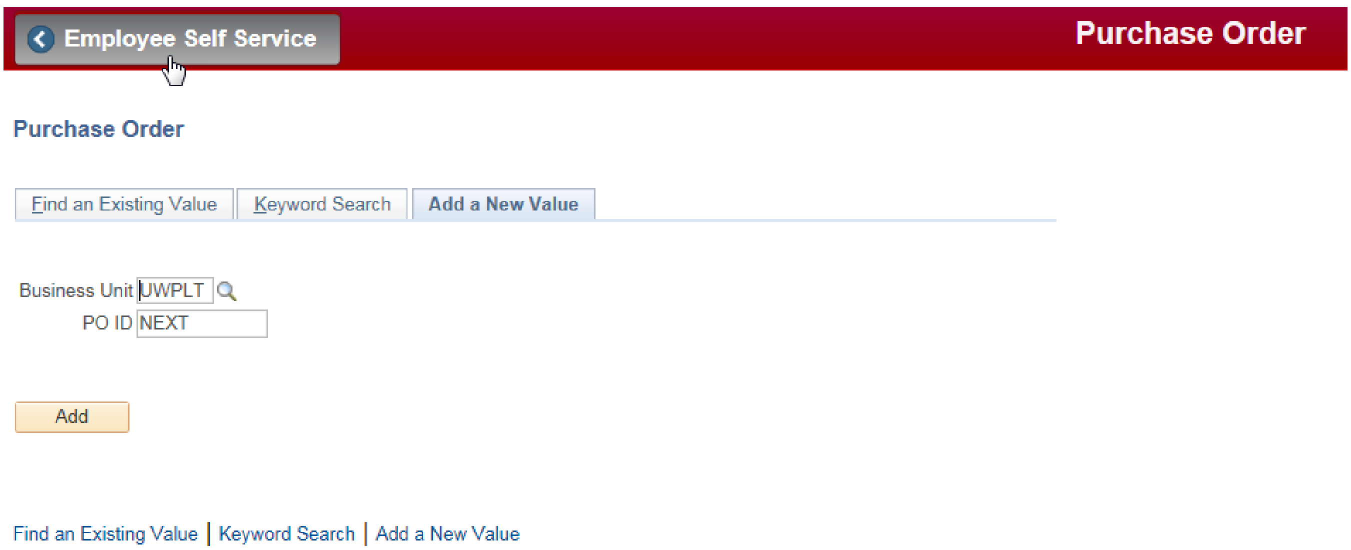
Enter criteria and click Search. POs with that criteria will appear for selection and review.

Process Detail

IV. Purchase Order Entry via the Regular PO Add/Update Page

The Add/Update Regular page can be accessed from the Buyer WorkCenter or through navigation.

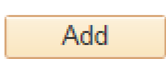
***Navigator**: Purchasing > Purchase Orders > Add/Update PO's*

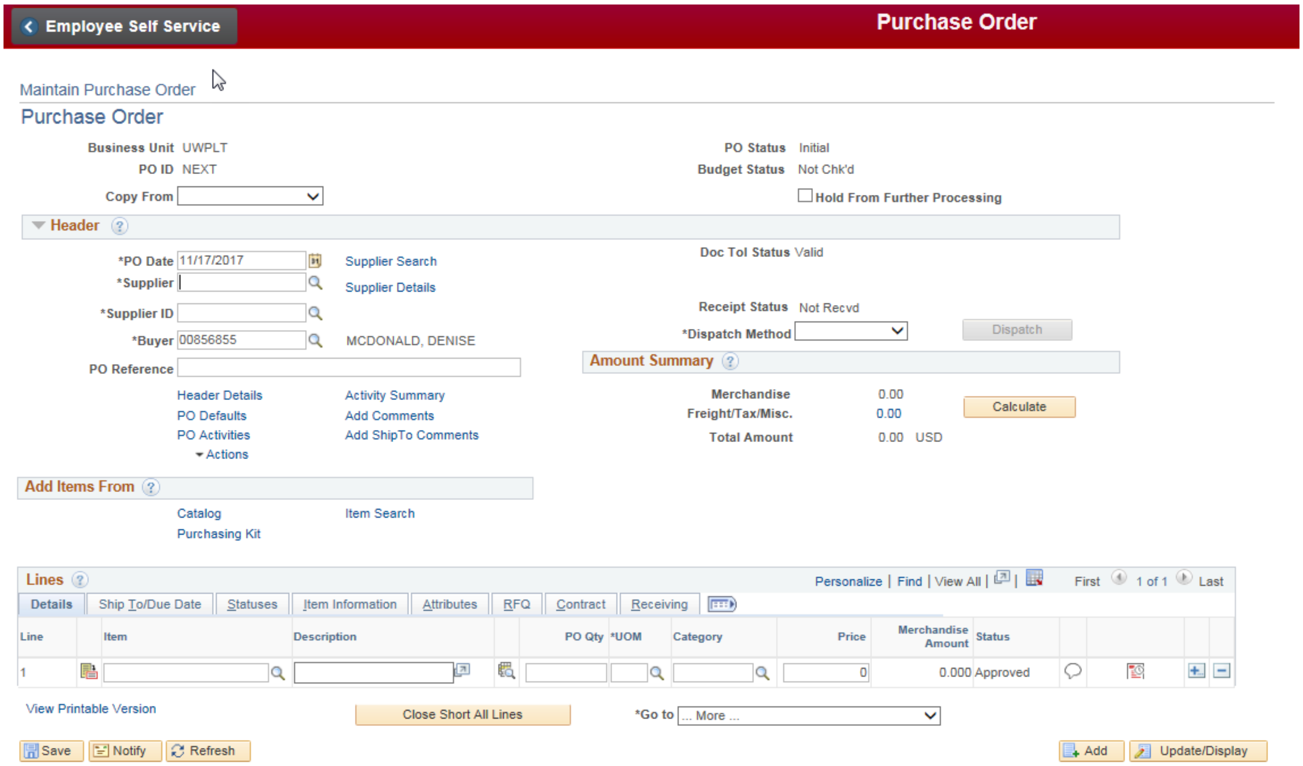


1. **Select**  tab.

2. **Enter** *Business Unit*: 'UW***'

3. The *PO ID* will **default** to 'NEXT'. If your Campus has chosen to utilize the PO auto-numbering function, leave this value. Otherwise manually **enter** a *PO ID*.

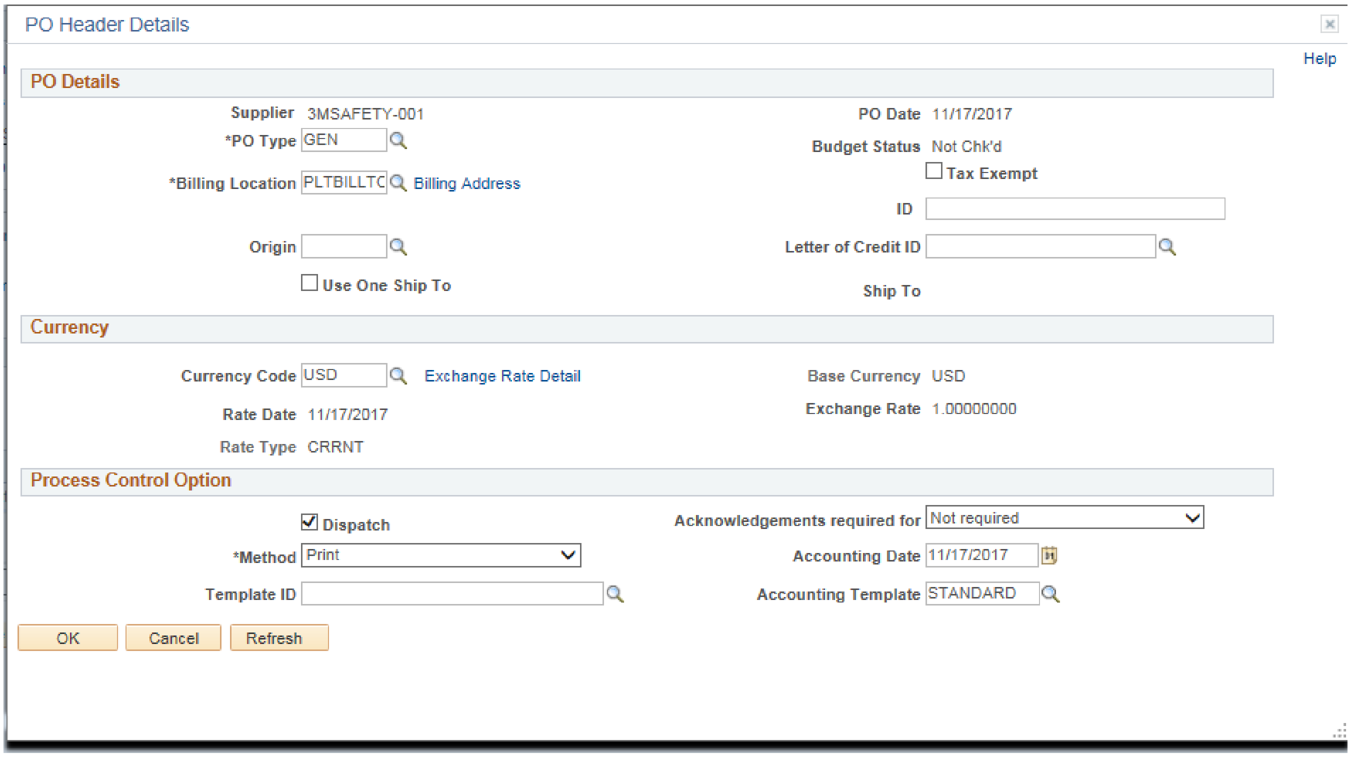
4. **Click**  , which will launch the PO Entry page



5. In the Header section, **enter** or **search** for *Supplier ID*.

6. **Enter** or **search** for *Buyer*. **Note:** The list of buyers a user can see is limited by their User Preferences

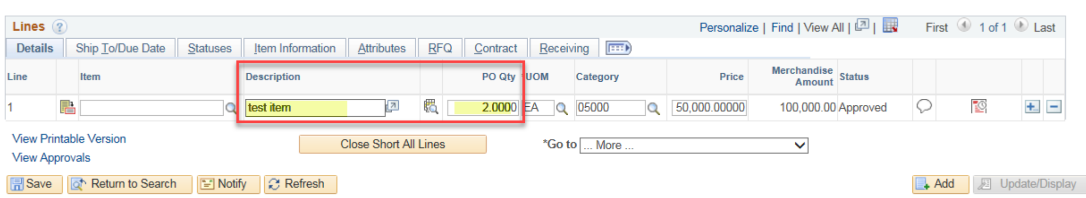
7. **Click** the *Header Details* hyperlink. The below are example header details that can be updated.
   a. *Accounting Date (very critical when creating POs for a new fiscal year)*
   b. *Dispatch Method*
   c. Override the supplier *Email Address* used for PO Dispatch
   d. PO Type - ***PO Type is no longer displayed on the main Purchase Order page. It can only be viewed and updated via the Header Details link.***



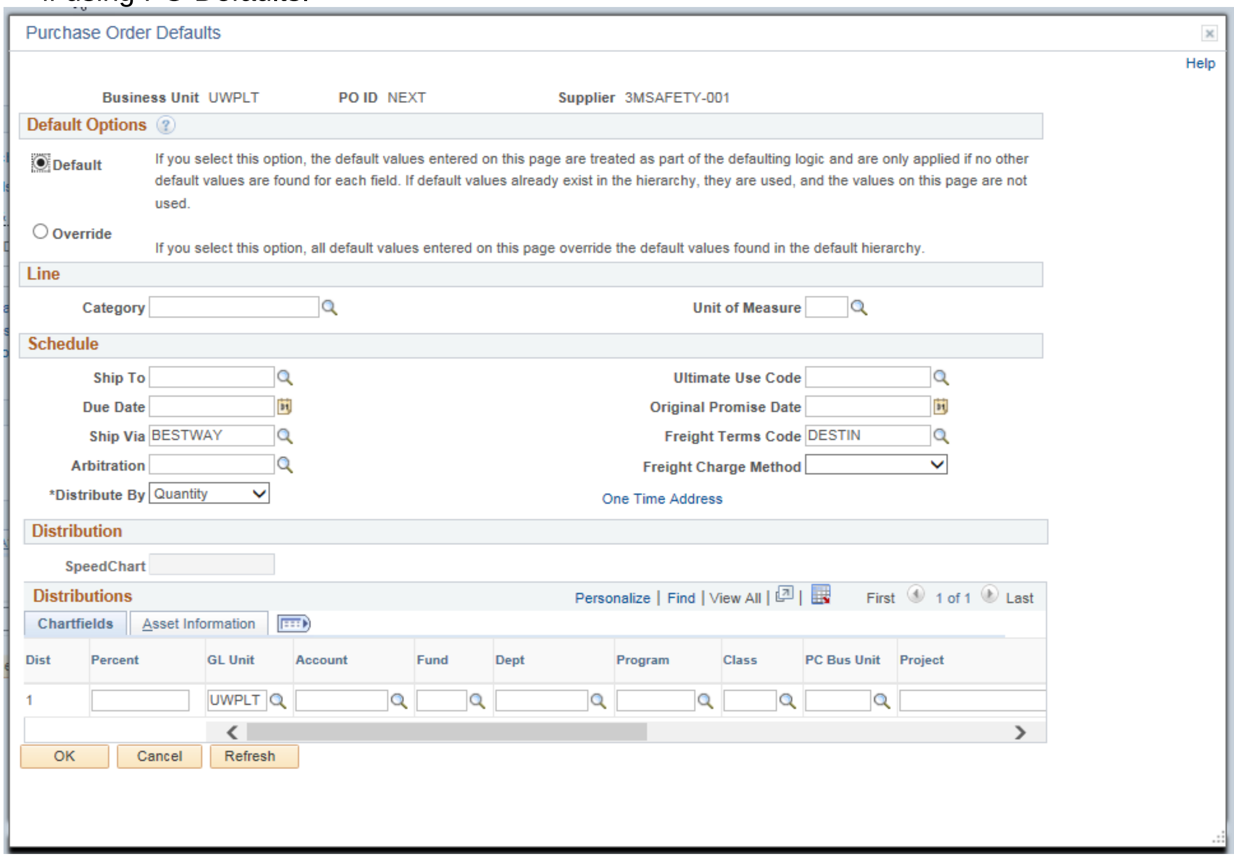
8. Make required updates.
9. **Click** OK

10. The main Purchase Order Page will be displayed.

11. If creating PO Defaults, enter an item description and quantity. This step must be done first, if using PO Defaults. Failure to update these fields, may prevent some of the defaults from coming into the purchase order.



12. **Click** the *PO Defaults* hyperlink, if desired. You must enter an item description and quantity if using PO Defaults.



13. **Select** the *Default* or *Override* radio button.
    a. **Default –** Select for single line distribution defaults
    b. **Override** – Select for split level distributions. The "+" to add multiple distribution lines will not be displayed under Distributions, if the Override radio button is not selected.

14. In the Line section, **Enter** or **Search** *Category*. This is the NIPG code. It can be changed on the line if the category per lines are different.
    a. Accounts are included in the category profile. These account codes will automatically default into the purchase order, but can be changed if necessary. *Please note, account assignment was based on overall UW institution usage.*
15. **Enter** or **Search** *Unit of Measure*. The unit of measure will default to each line of the order but can be changed on the line if a different unit of measure is required.
16. In the Schedule section **Enter** or **Search** *Ship To* location. Select the location that identifies where the items will be shipped to internally.

17. **Select** *Due Date*. If a due date is not entered, the due date for each schedule defaults to the purchase order date plus the number of lead time days defined for the item on the Purchase Order line.

18. **Leave** default ‘BESTWAY in *Ship Via* field.

19. **Leave** *Arbitration* blank.

20. **Select** *Distribute By*: ‘Amount’

21. **Leave** *Ultimate Use Code* blank.

22. The *Original Promise Date* **defaults** to the value entered in the Due Date field. This date is on the schedule as the date the supplier originally promises delivery.

23. **Enter** or **search** *Freight Terms Code*. Select the freight terms that apply to this order and supplier.

24. **Leave** *Freight Charge Method* blank.

25. In the *Distributions* section, **populate** a SpeedChart or **complete** as many ChartFields as possible. The completed fields will default to each distribution line. **All defaulted information can be changed on the Distribution Lines.**

    Note: If the ChartFields are left blank, manual updates will be required on each Distribution line. If the ChartFields are the same for each line, it is recommended to have the information default into the order, to reduce the amount of manual intervention.

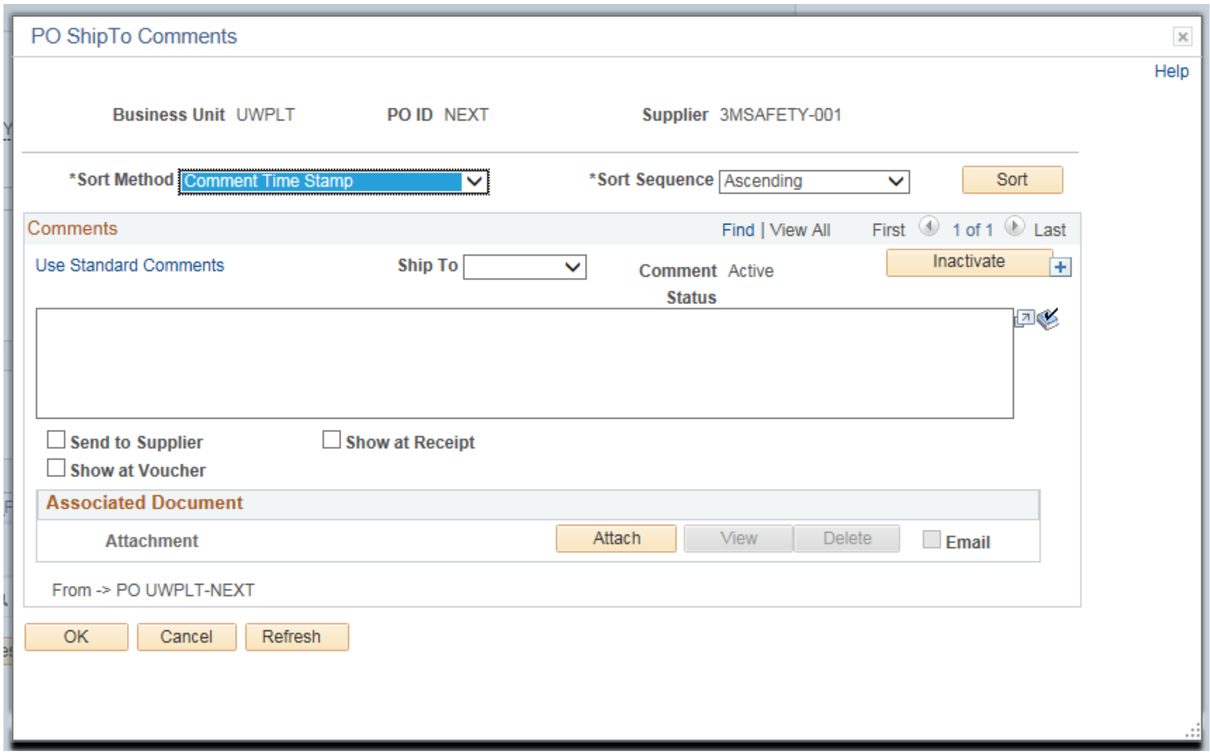
    Multiple distribution splits can be easily accomplished by using percent splits with the total of all distributions equaling 100%. The primary fields that will normally be used are: Account, Fund, Department, Program and Project (for campuses using Project Lite or Grants).

26. **Leave** the fields on the Asset Information tab blank as assets will only be integrated to Asset Management through Accounts Payable Vouchers.

27. **Click** OK to save changes and return to the Purchase Order main page.

Please note, all defaults carried forward on the purchase order can be changed on the purchase order if necessary.

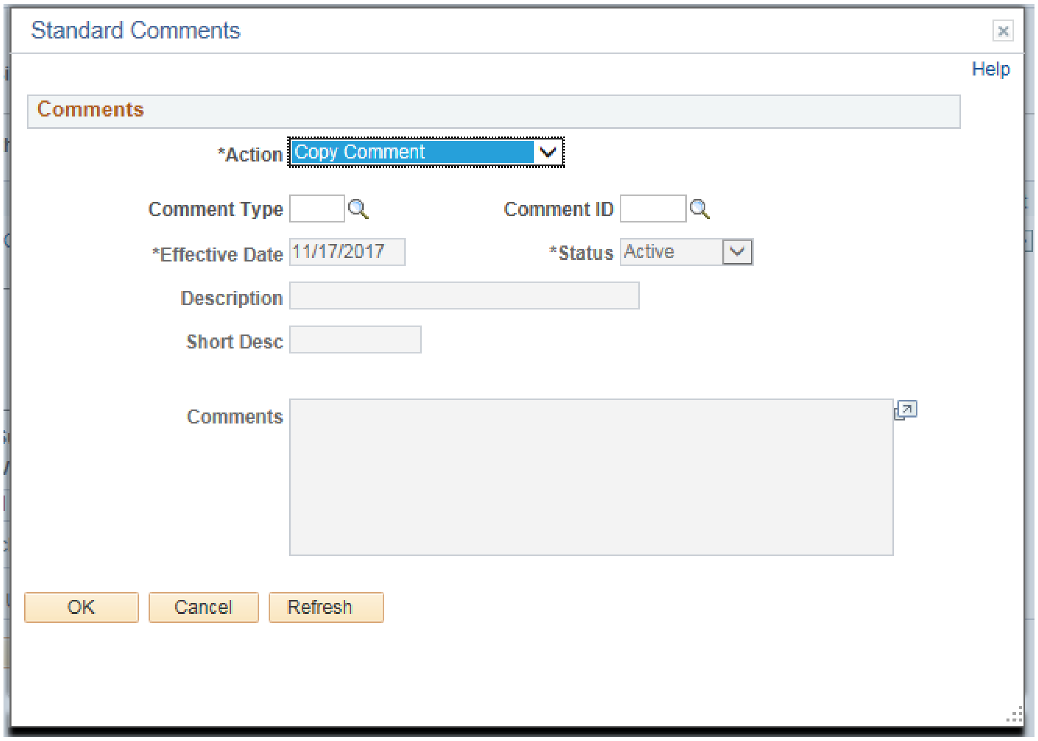
28. **Click** the *Add Ship to Comments* hyperlink.



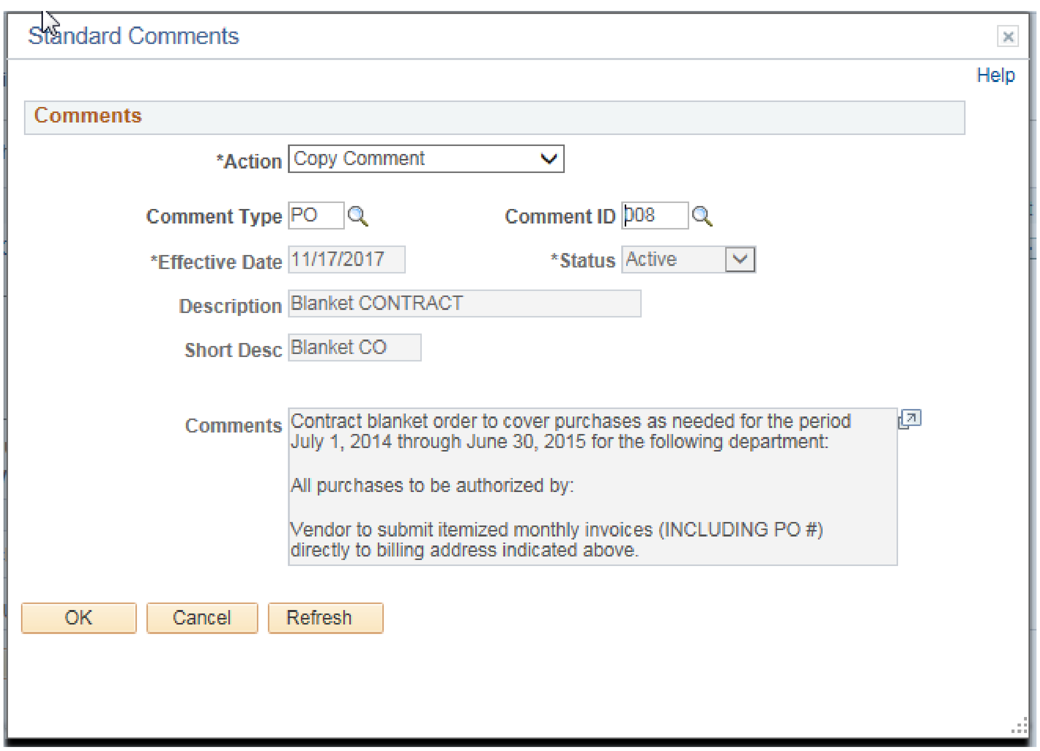
29. Complete the PO Ship To Comments page per the requirements for the given PO.

30. In the Comments section, **Select** *Ship To* from pull down menu. **Note**: You cannot copy a comment without a *Ship To* location.

31. **Click** the *Use Standard Comments* hyperlink, which will provide comments available for selection, or manually enter in a comment.

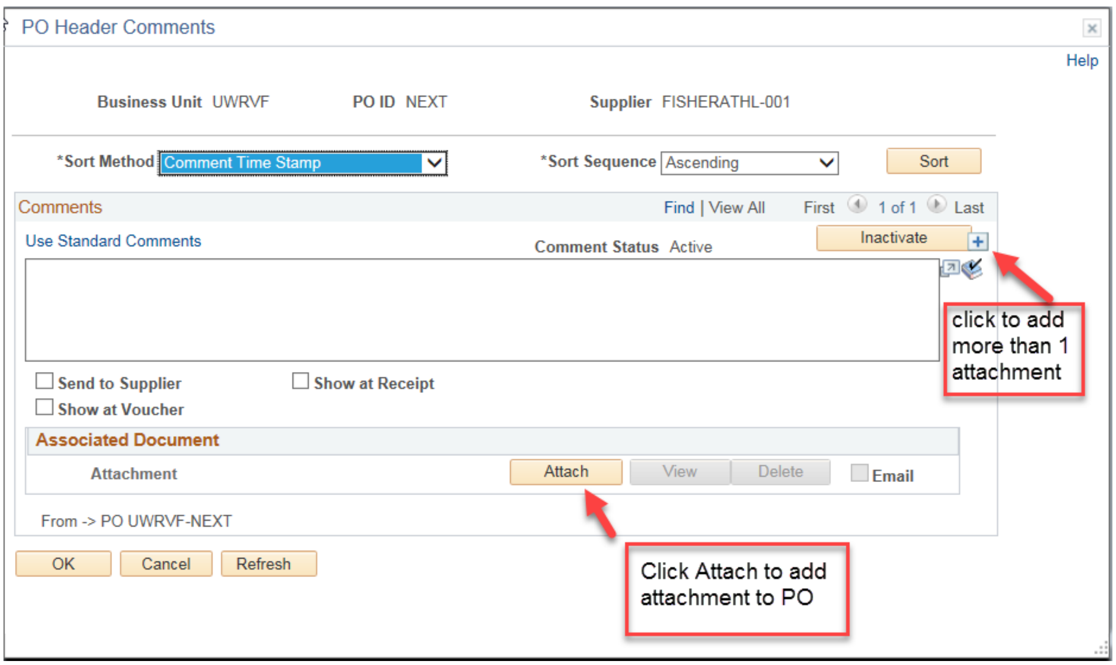


32. **Select** *Action*: 'Copy Comment'.

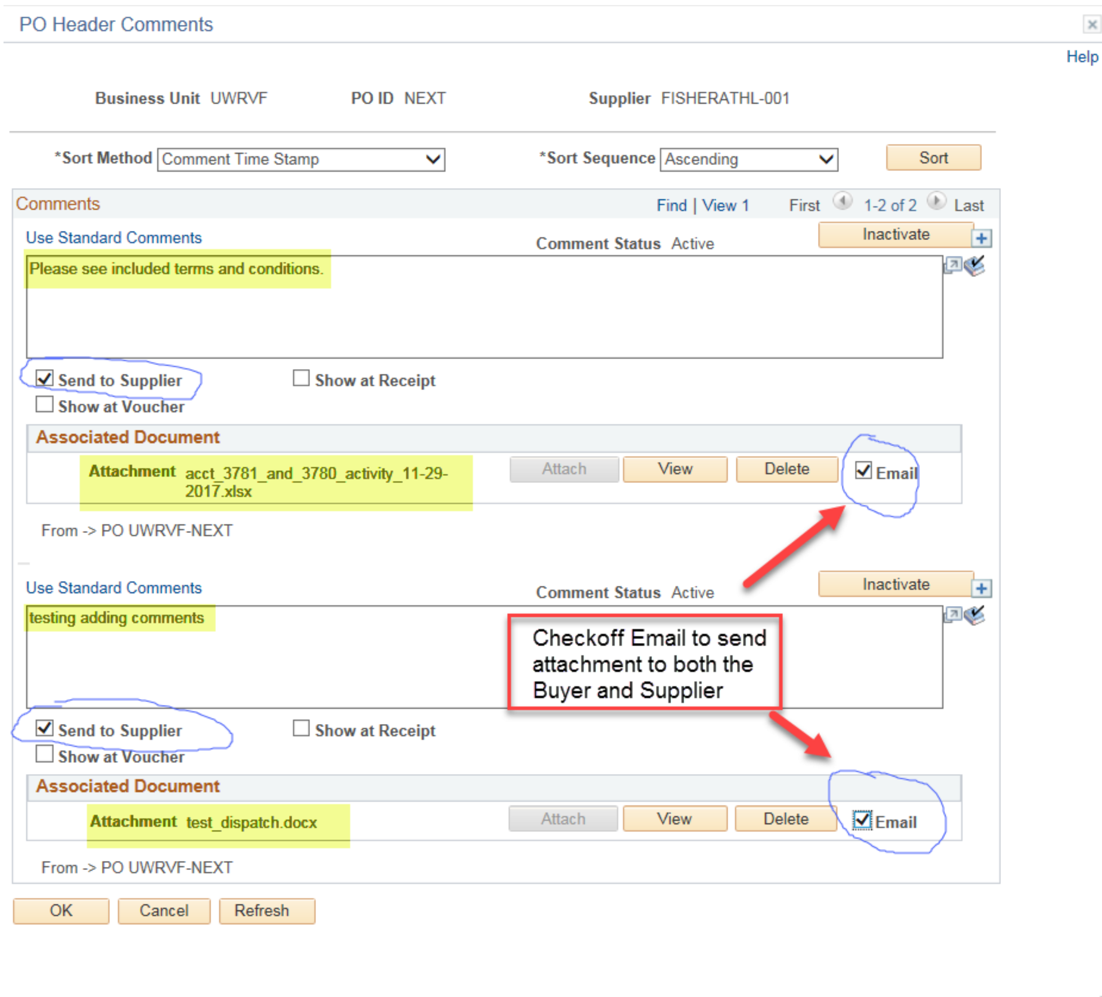


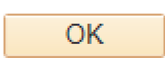
33. **Click** OK to retain your changes and return to the PO Ship To Comments page.

Note: Attachment(s) can be added to the PO by clicking Attach. To add additional documents, click "+" next to the Inactivate button.

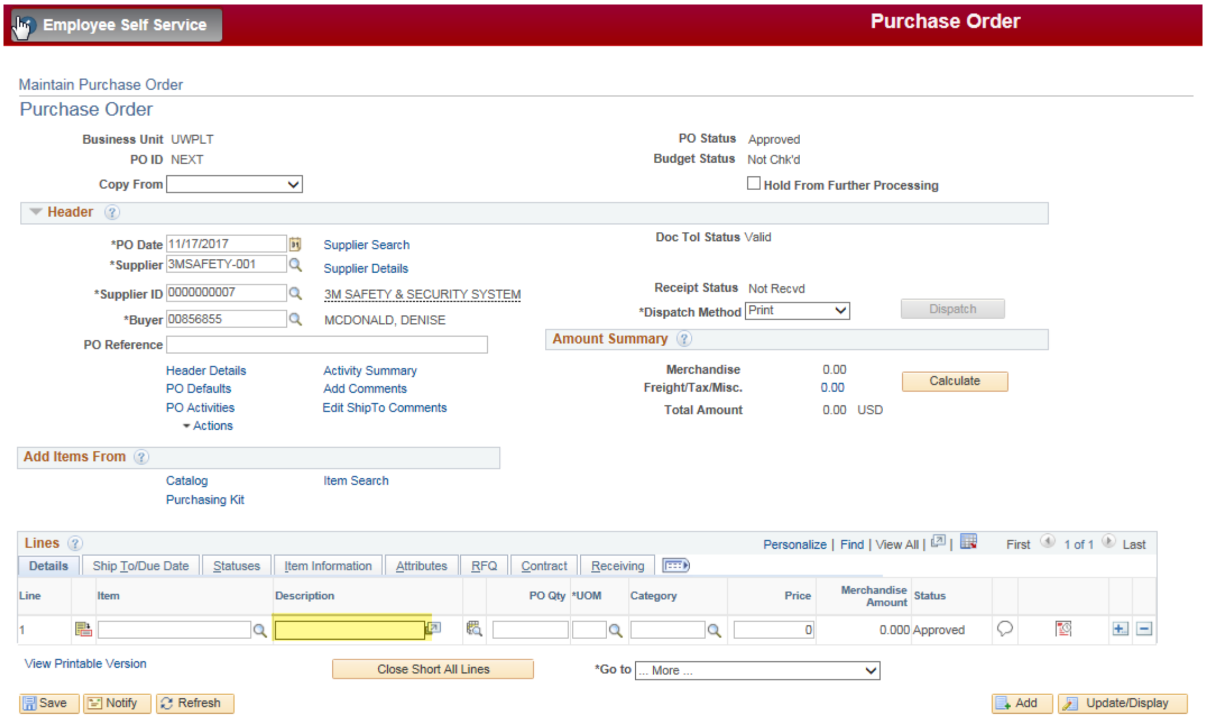


For Emailed Dispatched POs, **check** the Email box to send the attachment to the Buyer. To send the Attachment to the Buyer <u>and</u> Supplier, **check** the *Send to Supplier* box. Please note, checking the *Send to Supplier* box will also send Comment(s) to the Supplier.



34. **Click** 

again to retain your changes. The main Purchase Order page will be displayed.



35. In the Line section, **Enter** *Description*.

    Note: By clicking the  in the upper right corner of the *Description* field an editable modal window will open, which makes it easier to enter a lengthy description.

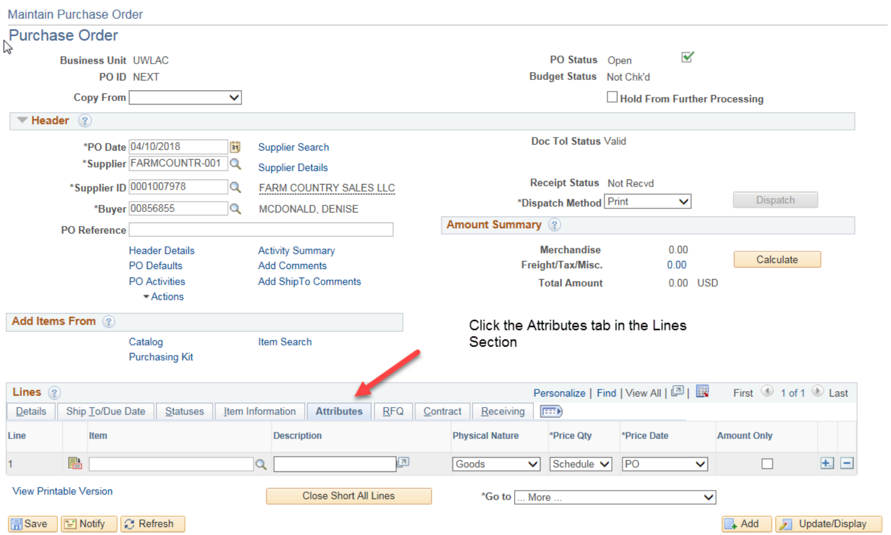
36. **Enter** *PO Qty* (PO Quantity).

37. **Enter** *UOM* (Unit of Measure).

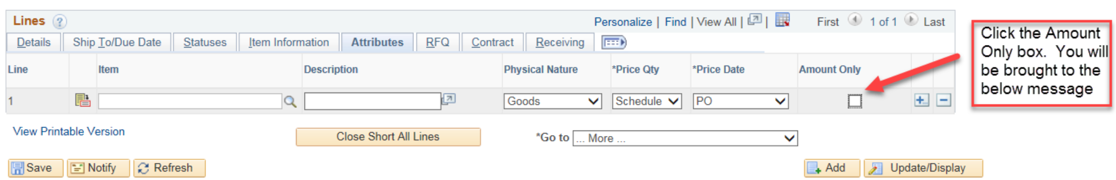
38. **Enter** *Category*, if required.

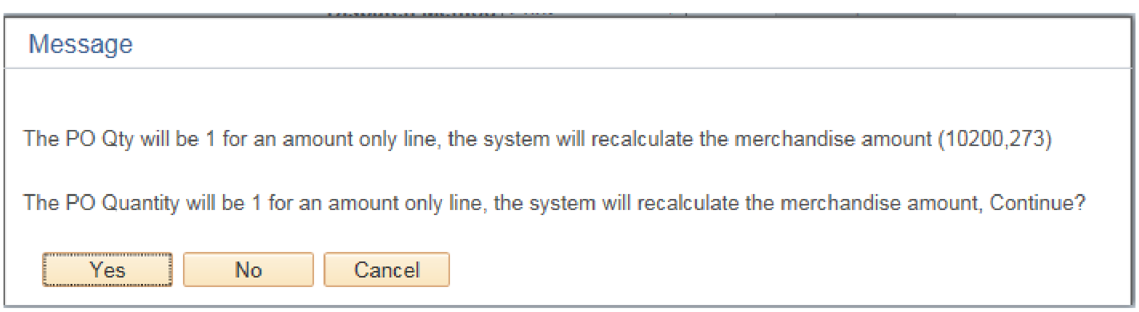
39. **Enter** *Price*

40. If you are creating an **Amount Only** Purchase Order, **Click** the Attributes tab. **An Amount Only PO is required if your institution uses Matching**. If you are not creating an Amount Only Purchase Order, skip to step 43.



41. Once you click the Attributes tab, the below screen will appear. **Check** the Amount Only box.

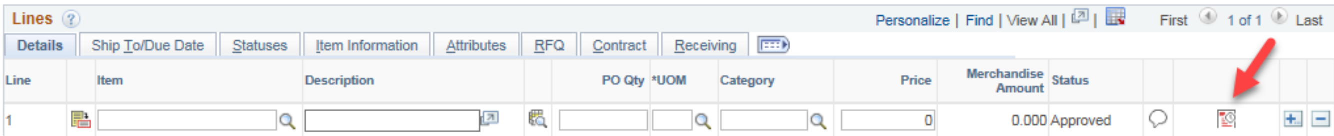




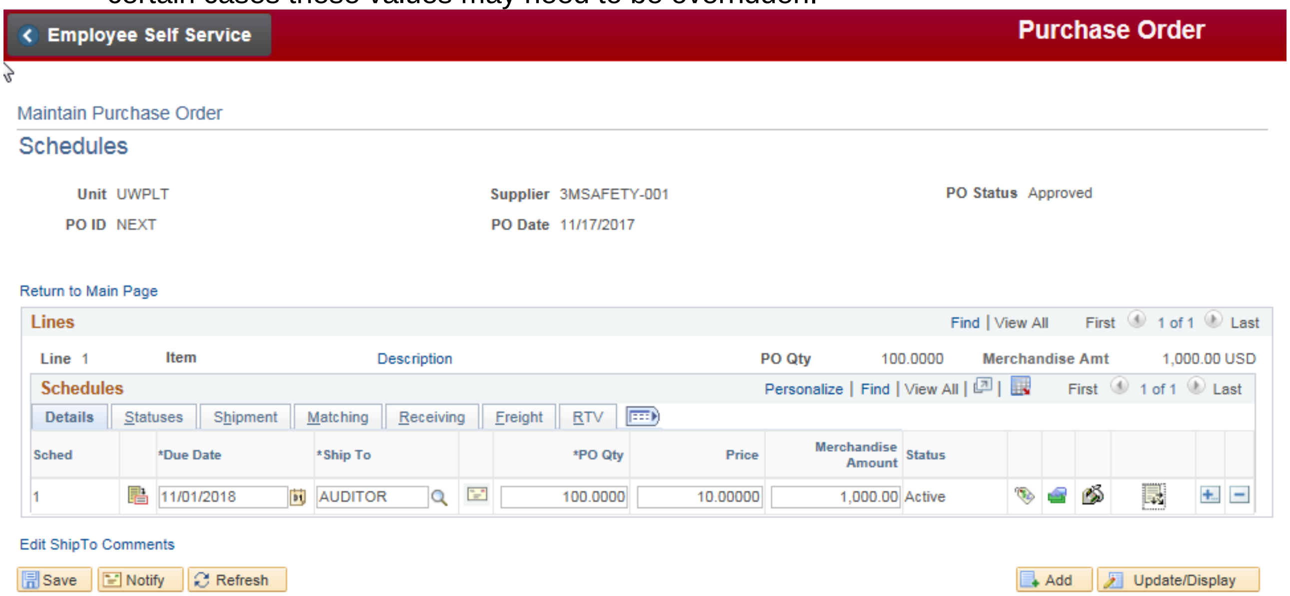
42. An Amount Only PO can only have a quantity of 1. The message box is confirming you want the PO to be Amount Only.

43. **Click** Yes. The PO will recalculate using a quantity of 1. If the quantity is already 1, the Merchandise Amount will not change.

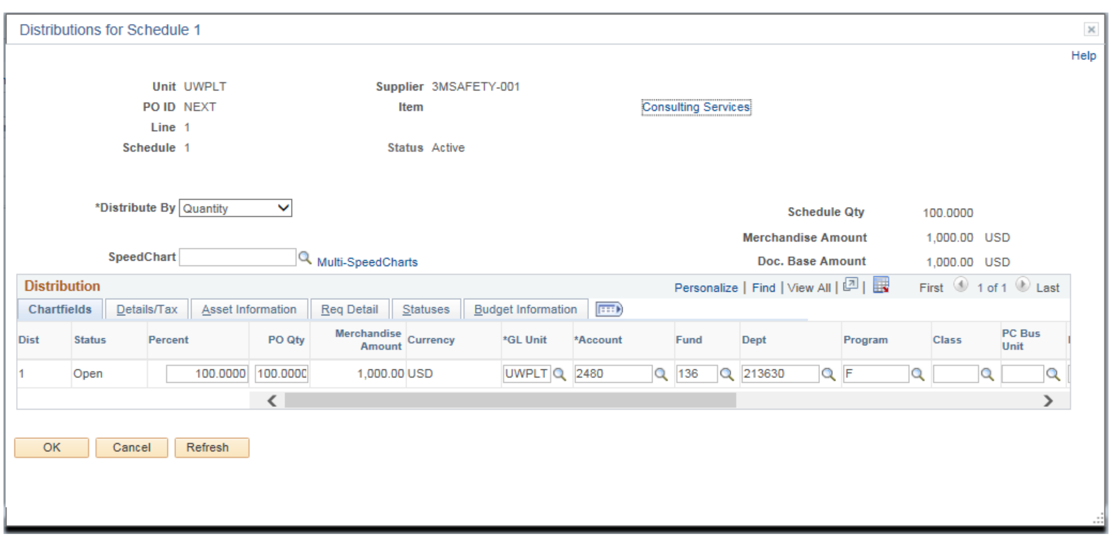
44. To enter Line comments, **Click** the icon



45. **Click** the icon to access the *Schedule* section, all fields should have defaulted in. In certain cases these values may need to be overridden.



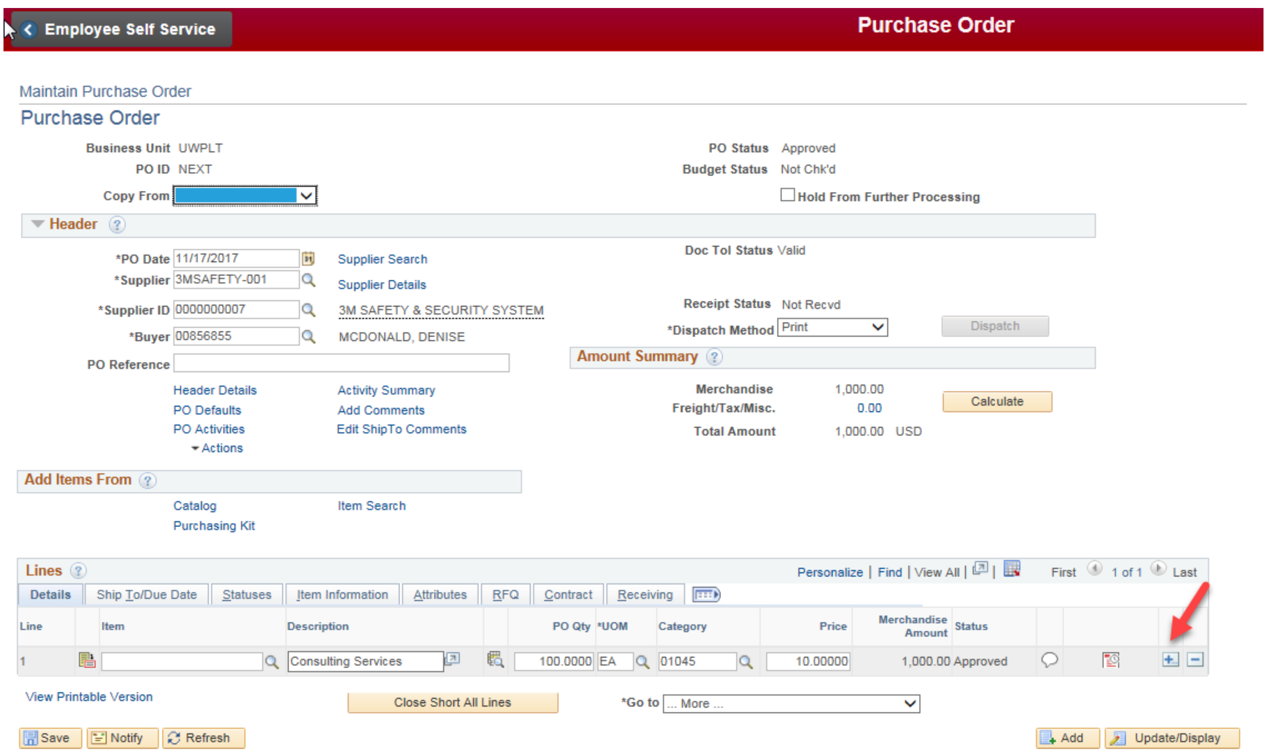
46. **Click** the icon to access the *Distribution* section. **Review** and **Update** the distribution line where the defaults may need to be changed. **Note:** Speed Chart can be used to populate the chart field distributions.



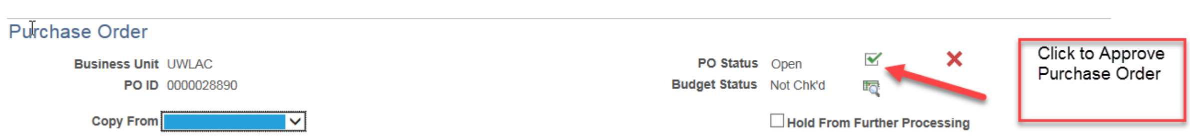
47. **Click** OK

48. **Click** Save. If any errors display, they must be corrected before the document can be saved. **Note:** If you have not saved the document and are timed out, you must start the process over.

49. Repeat this process for each additional Line of the PO. Click the icon to add lines to the PO. You can also add lines that are No Charge or Zero dollars and lines that are Negative for discounts. <u>If adding negative amounts, make sure the total amount on the PO is greater than zero</u>.



50. Some UW Institutions have Auto Approve. If this feature is not configured at your institution, approve the Purchase Order by clicking the green check box. You are now ready to Budget Check and Dispatch the PO.

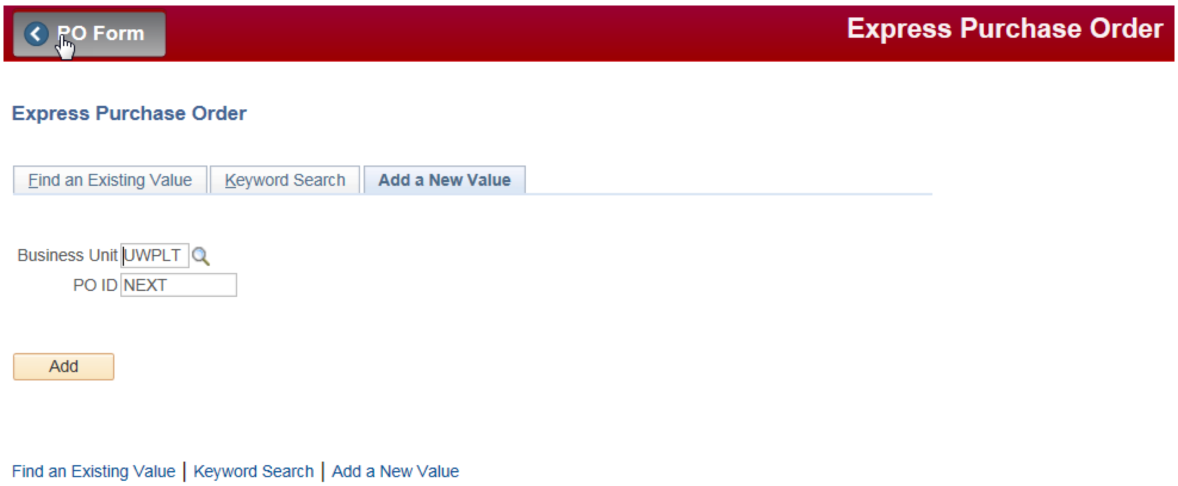


V. Purchase Order Entry via the Express PO Entry Page

The Express Purchase Order entry page allows you to view line, schedule, and distribution information all on one page. However, when using the Express PO page you <u>cannot</u> allocate header miscellaneous charges.

The Express PO page can be accessed from the Buyer WorkCenter or through navigation.

Navigator: *Purchasing > Purchase Orders > Add/Update Express POs*

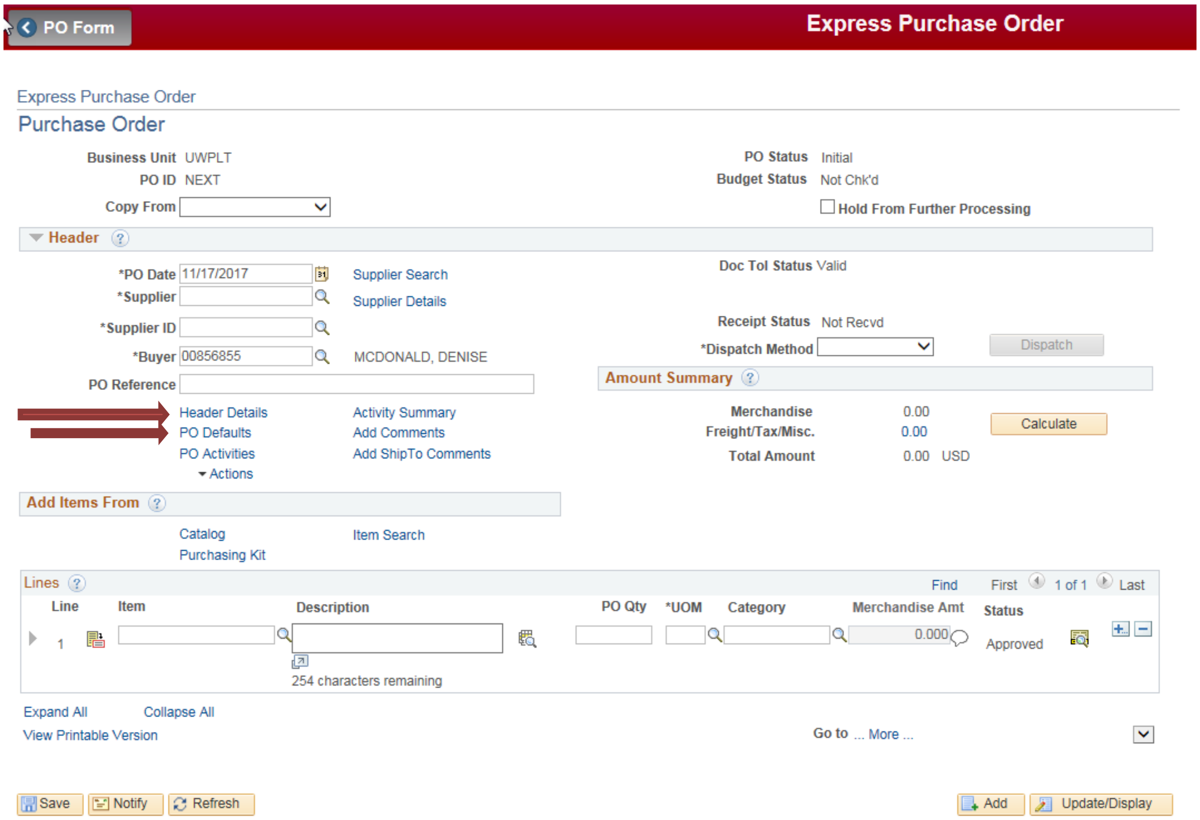


51. **Select** Add a New Value tab.

52. **Enter** *Business Unit*: 'UW***'

53. *PO ID* will **default** to 'NEXT', leave as is or **enter** *PO ID* if your business unit does not use auto-numbering.

54. **Click** Add

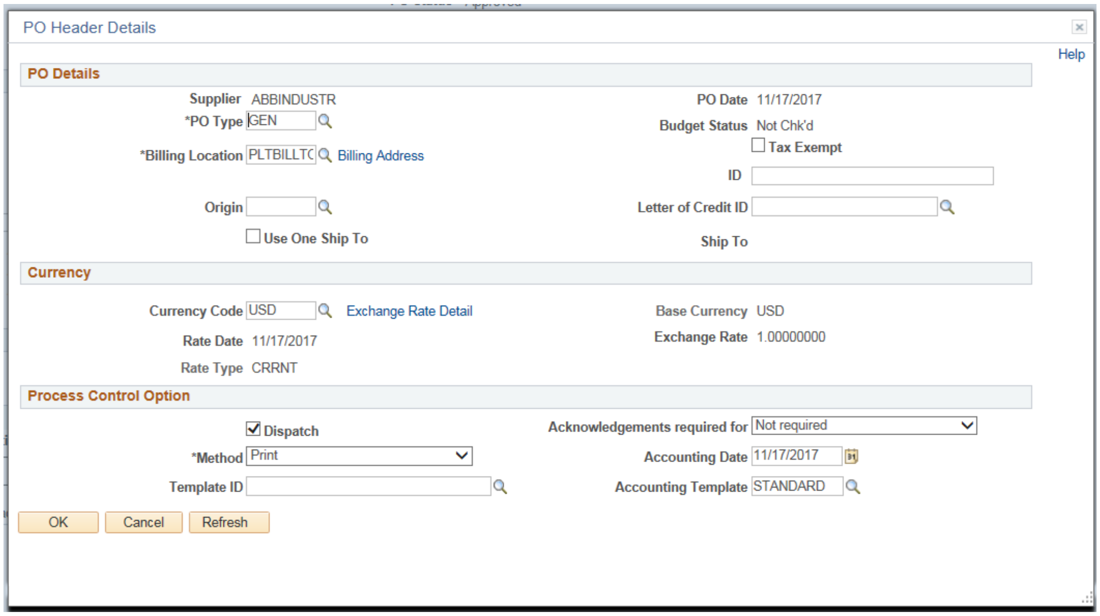


55. The Express Purchase Order screen will appear. In the Header section, **Enter** or **Search** *Supplier ID*.

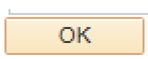
56. **Enter** or **Search** *Buyer*.

57. **Click** the *Header Details* hyperlink. The below are example fields that can be updated.

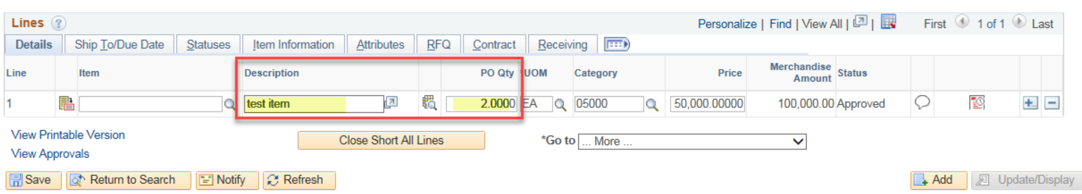
   a. *Accounting Date (very critical when creating POs for a new fiscal year)*
   b. *Dispatch Method*
   c. Override the supplier *Email Address* used for PO Dispatch
   d. PO Type - ***PO Type is no longer displayed on the main Purchase Order page. It can only be viewed and updated via the Header Details link.***



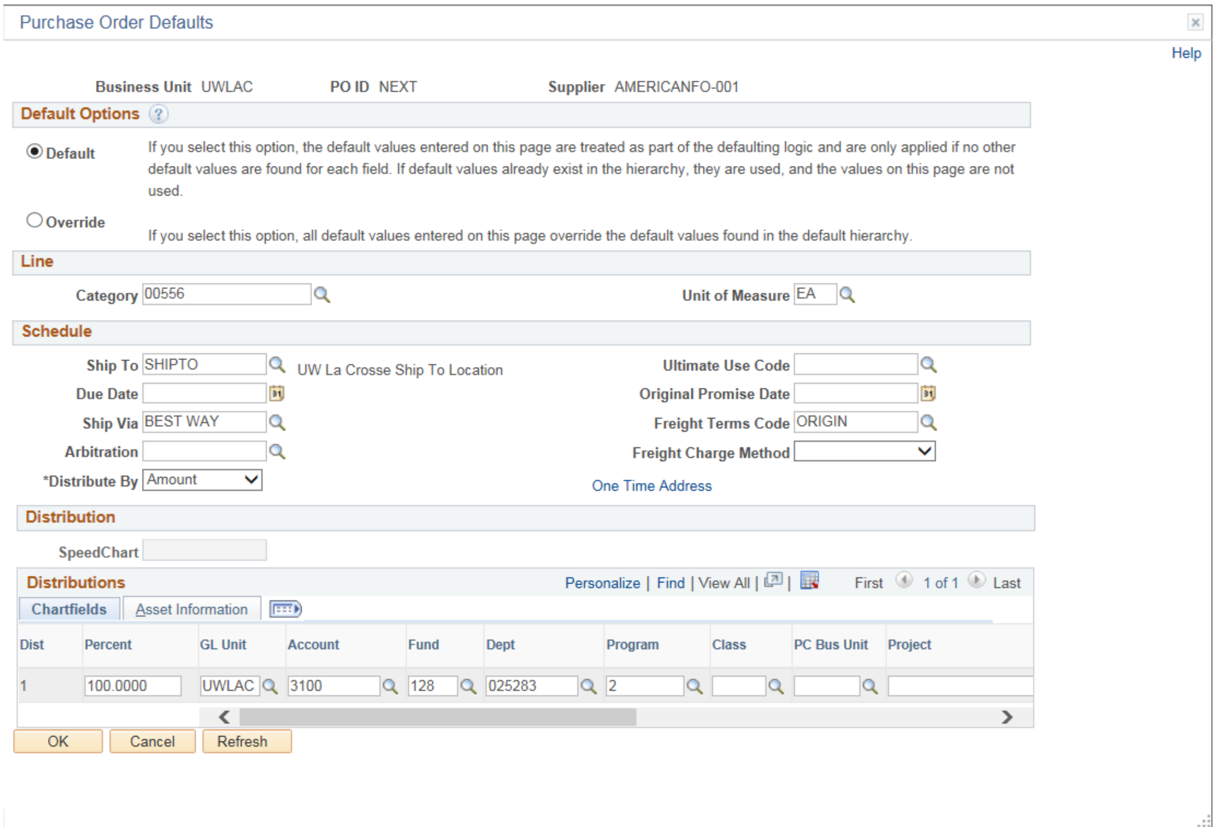
58. Make **changes** as needed.

59. **Click** 

60. If creating PO Defaults, enter an item description and quantity. This step must be done first, if using PO Defaults. Failure to update these fields, may prevent some of the defaults from coming into the purchase order.



61. **Click** the *PO Defaults* hyperlink, if desired. You must enter an item description and quantity if using PO Defaults.



62. **Select** the *Default* or *Override* radio button.
   a. **Default –** Select for single line distribution defaults
   b. **Override** – Select for split level distributions. The "+" to add multiple distribution lines will not be displayed under Distributions, if the Override radio button is not selected.

63. In the Line section, **Enter** or **Search** *Category*. This is the NIPG code. It can be changed on the line if the category is different for a given line.
   a. Each category profile now includes an Account Code. These account codes will automatically default on your purchase order, but can be changed if necessary. Please note, account assignment was based on overall UW Institution usage.

64. **Enter** or **Search** *Unit of Measure*. The unit of measure will default to each line of the order but can be changed on the line if a different unit of measure is required.

65. In the Schedule section **Enter** or **Search** *Ship To* location. **Select** the location that identifies where the items will be shipped to internally.

66. **Select** *Due Date*. If a due date is not entered, the due date for each schedule will be the Purchase Order Date plus the number of lead time days defined for the item on the Purchase Order line.

67. **Leave** default 'BESTWAY' in *Ship Via* field.

68. Leave Arbitration blank.

69. **Select** *Distribute By*: 'Amount '

70. **Leave** *Ultimate Use Code* blank.

71. The *Original Promise* date **Defaults** to the Due Date. This date is on the schedule as the date on which the supplier originally promises delivery.

72. **Enter** or **Search** *Freight Terms Code*. Select the freight terms that apply to this order and supplier. **Leave** *Freight Charge Method* blank.

73. In the Distribution section, **populate** a SpeedChart or **complete** as many Chartfields as possible. The completed fields will default to each Distribution Line. All defaulted information can be changed on the Distribution line of the order if the defaulted data is not correct for the line.

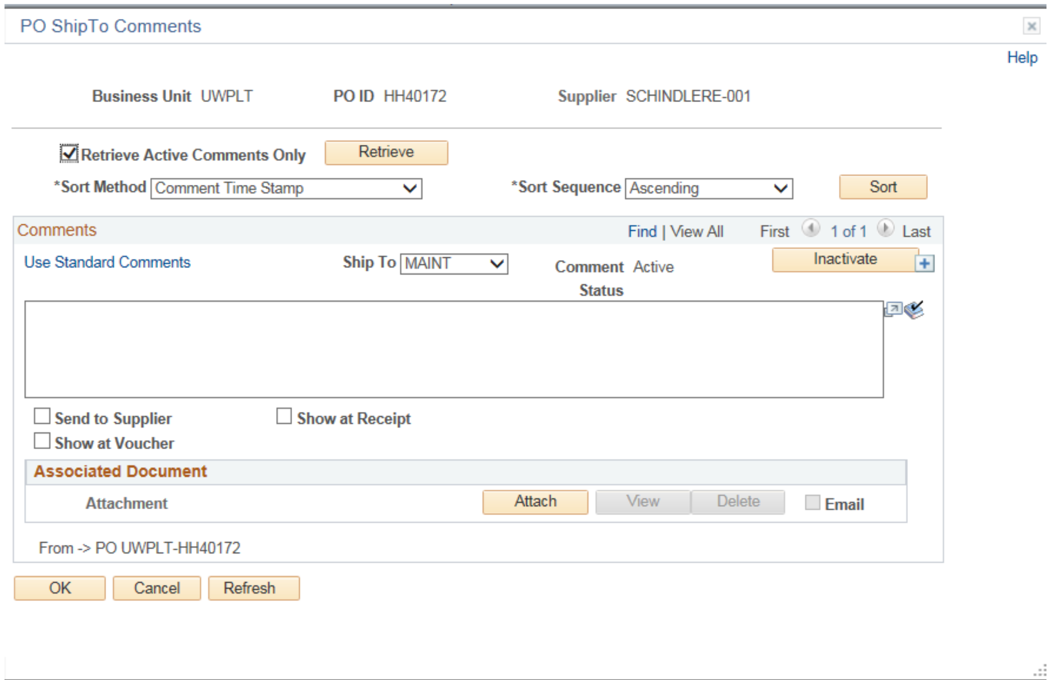
    Note If ChartFields are left blank, manual updates will be required for each distribution line. If the chartfields are the same for each line, it is recommended defaults are entered, to reduce the amount of manual intervention. Multiple distribution splits can be easily accomplished by using percent splits with the total of all distributions equaling 100%. The primary fields that will normally be used are: Account, Fund, Department, Program and Project (for campuses using Project Lite or Grants).

74. **Leave** the fields on the *Asset Information* tab blank. Assets will only be integrated to Asset Management through Accounts Payable Vouchers.

75. **Click** OK to preserve your changes and to return to the Express Purchase Order main page.

Please note, all defaults carried forward on the purchase order can be changed on the purchase order if necessary.

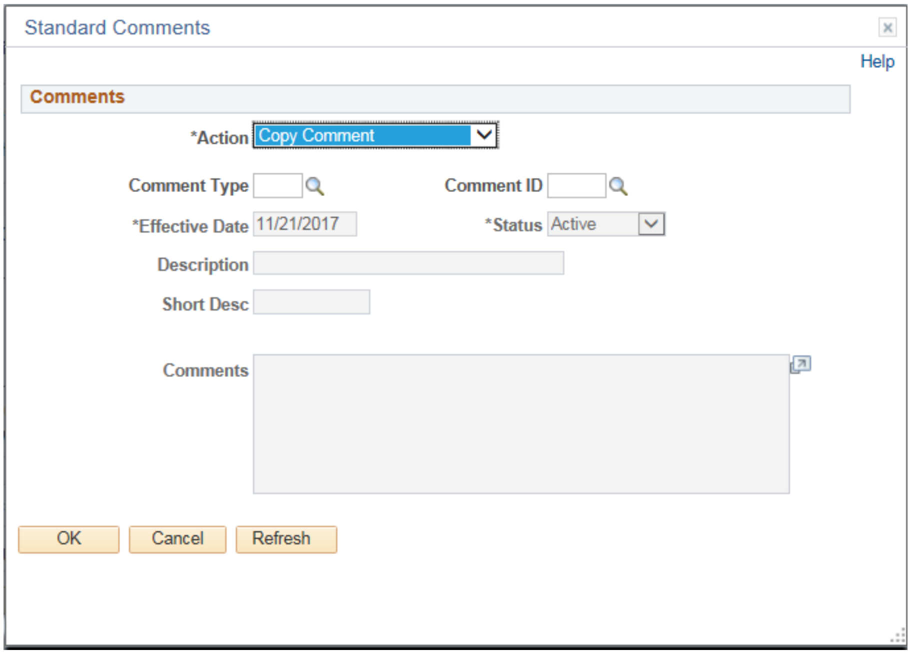
76. **Click** the *Add Ship To Comments* hyperlink.



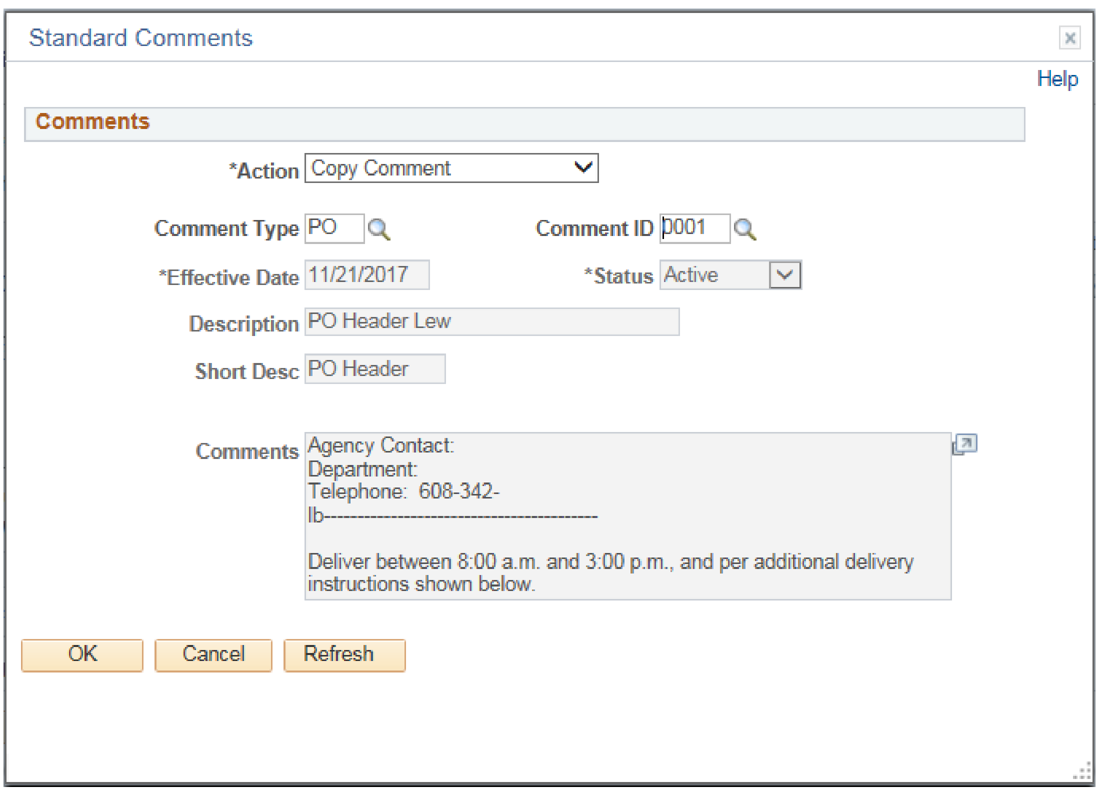
77. **Complete** the *PO Ship To Comments* page per the requirements for the given PO.

78. In the Comments section, **Select** *Ship To* from the drop down menu. **Note:** You cannot copy a comment without a *Ship To* location.

79. To add predefined comments, **Click** the *Use Standard Comments* hyperlink which will provide comments available for selection.

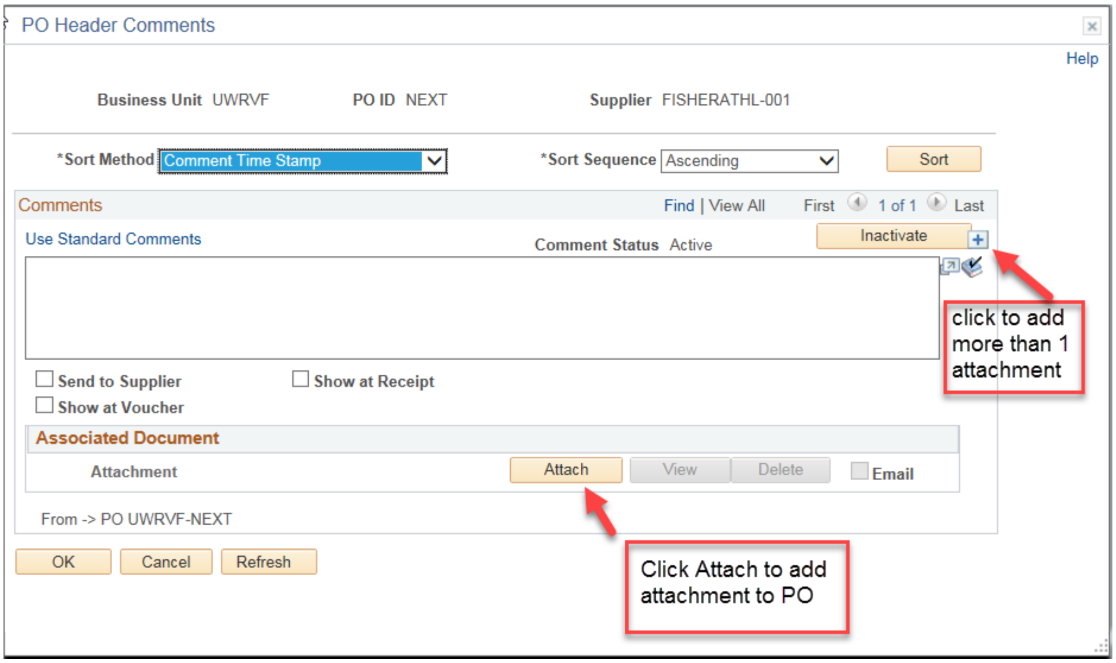


80. **Select** *Action*: ‘Copy Comment’.

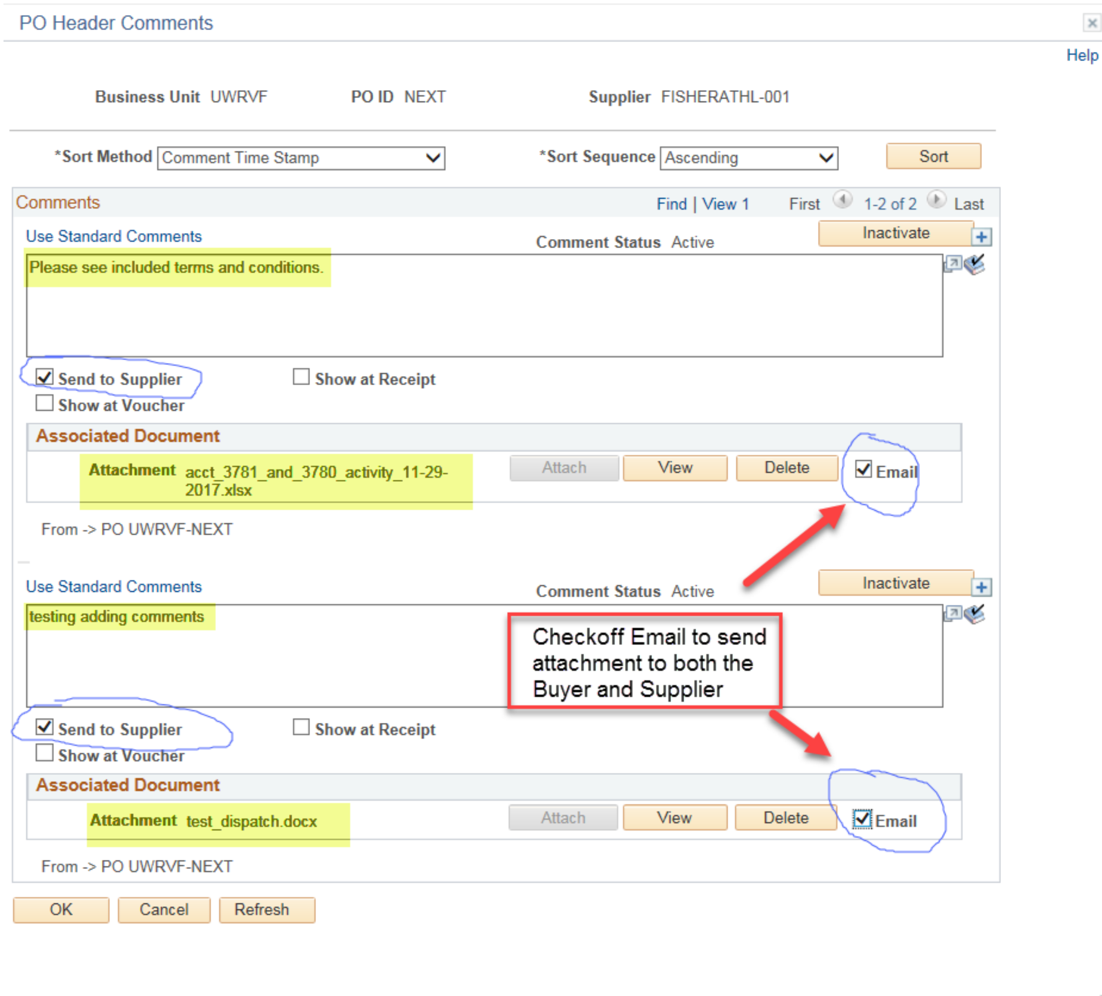


81. **Click** OK to preserve work and return to the PO Ship To Comments page.

Note: Attachment(s) can be added to the PO by clicking Attach . To add additional documents, click “+” next to the Inactivate button.

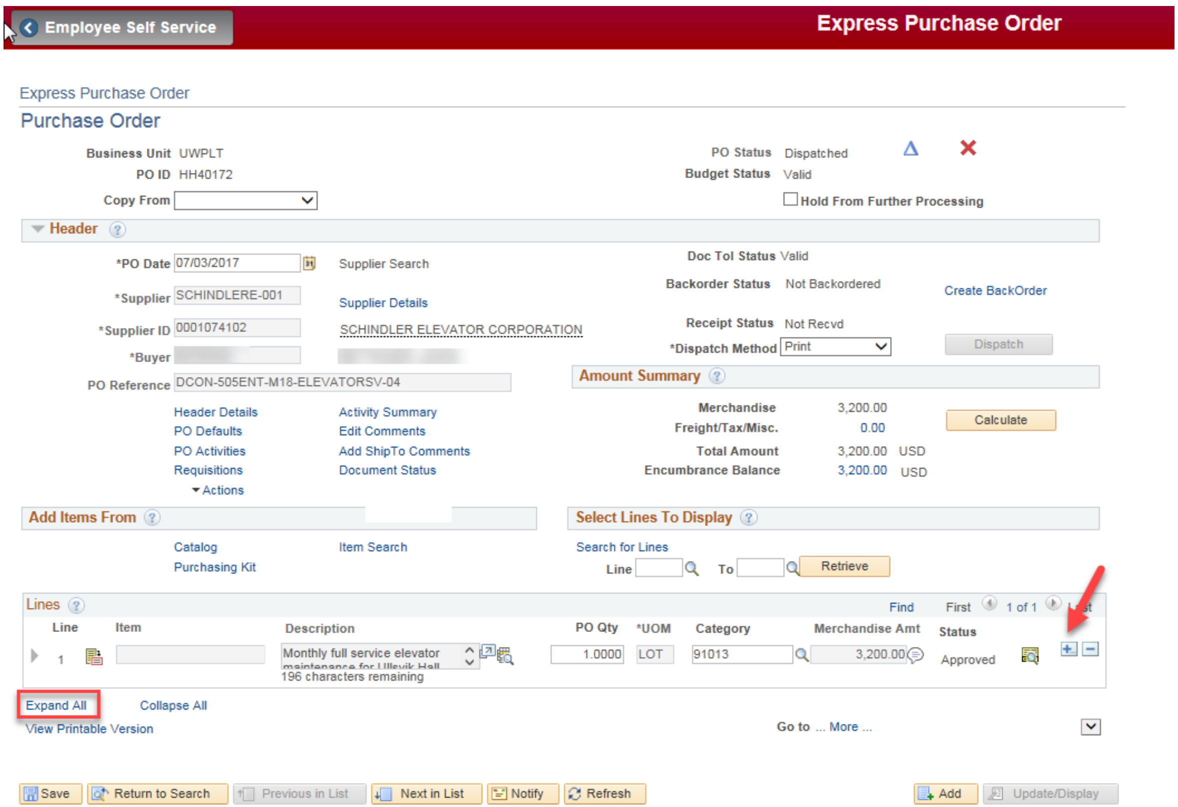


For Emailed Dispatched POs, **check** the Email box to send the attachment to the Buyer. To send the Attachment to the Buyer <u>and</u> Supplier, **check** the *Send to Supplier* box. Please note, checking the *Send to Supplier* checkbox will also send Comment(s) to the Supplier.

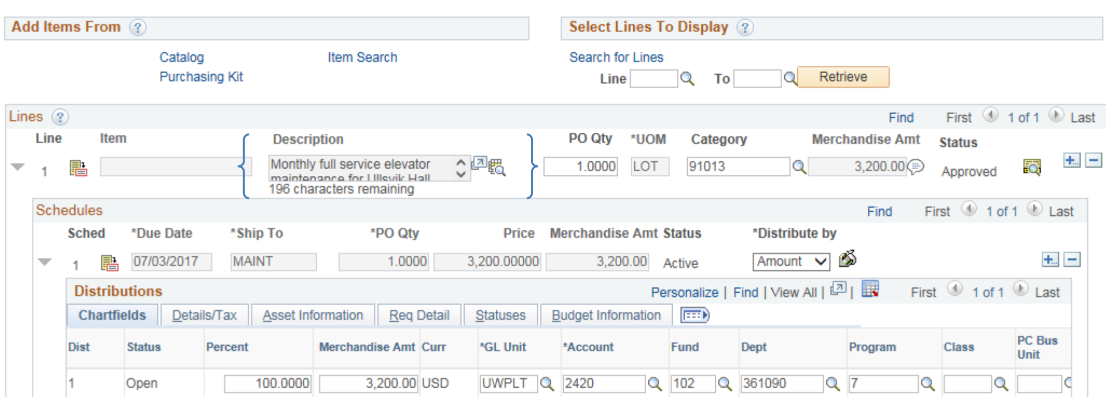


82. **Click** OK again to return to the Express Purchase Order page.

83. In the Lines section at the bottom of the page, **click** to add lines to the PO. You can also add lines that are No Charge or Zero dollars and lines that are Negative for discounts. <u>Make sure the net PO amount is a positive number</u>.



84. After all the lines are added, **click** *Expand All* hyperlink.



85. In the Lines section, **Enter** the line *Description*.

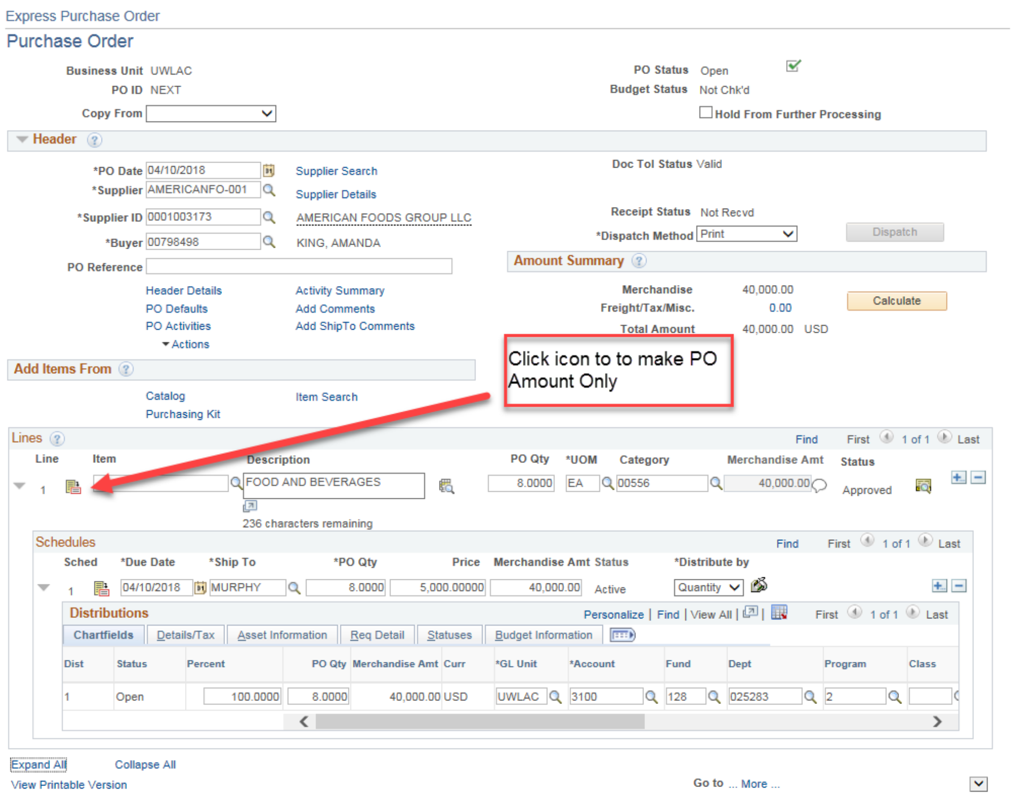
Note: By clicking the in the upper right corner of the *Description* field an editable modal window will open, which makes it easier to enter a lengthy description.

86. **Enter** *PO Qty* (PO Quantity).

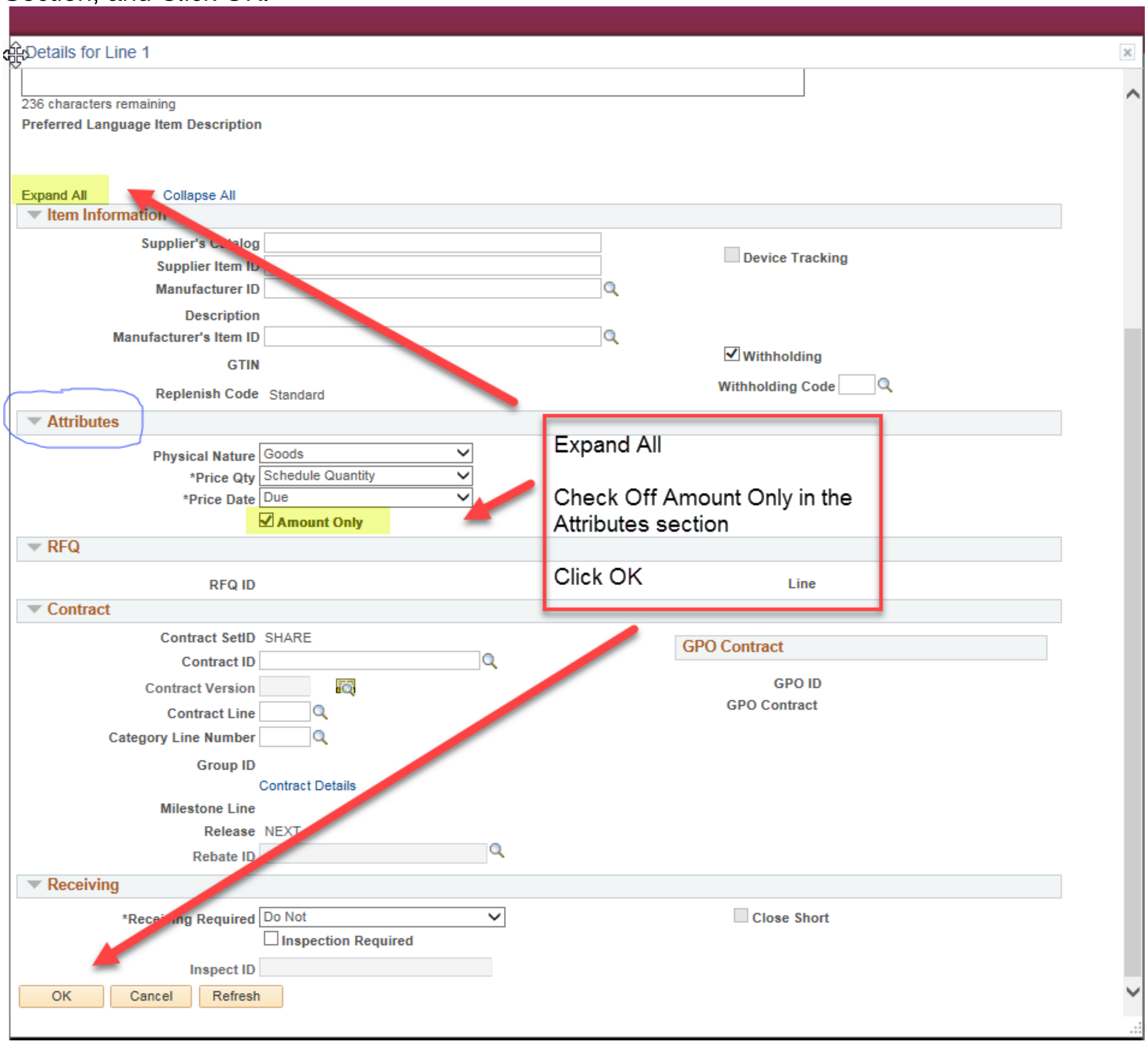
87. **Enter** *UOM* (Unit of Measure).

88. **Enter** *Category*, if required.

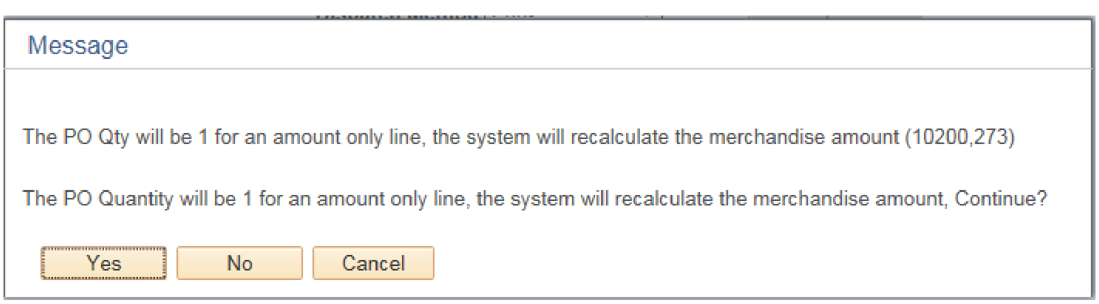
89. To make the PO Amount Only, click the link to the Details for Line page. **This step is necessary for Institutions using Matching**. If the PO you are creating is not Amount Only, skip to step 92.



90. You will get the below screen. Expand All and Check the Amount Only box in the Attributes Section, and Click OK.



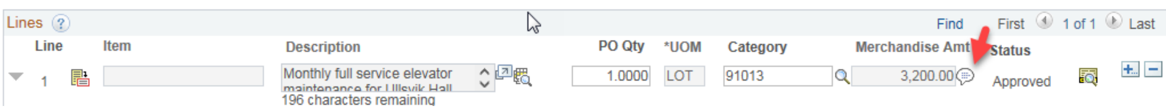
91. You will get the below message box.



92. An Amount Only PO can only have a quantity of 1. The message box is confirming you want the PO to be Amount Only.

93. **Click** Yes. The PO will recalculate using a quantity of 1. If the quantity is already 1, the Merchandise Amount will not change.

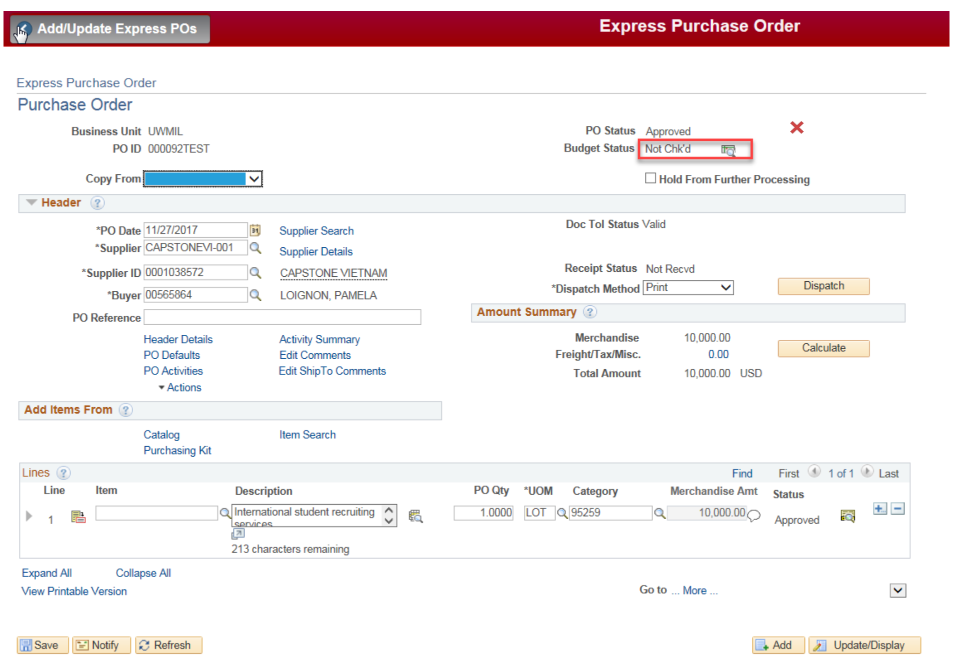
94. To enter a Line comment **Click** the ' icon.



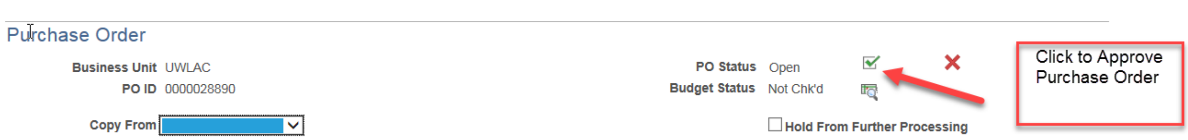
95. In the *Schedules* section **Review** the default values and **Update** where needed.

96. In the *Distributions* section, **Review** and **Update** the distribution of each line where the defaults are need to be changed.

97. **Click** Save. If any errors display, they must be corrected before the document can be saved. **Note:** If you have not saved the document and are timed out, you must start the process over.

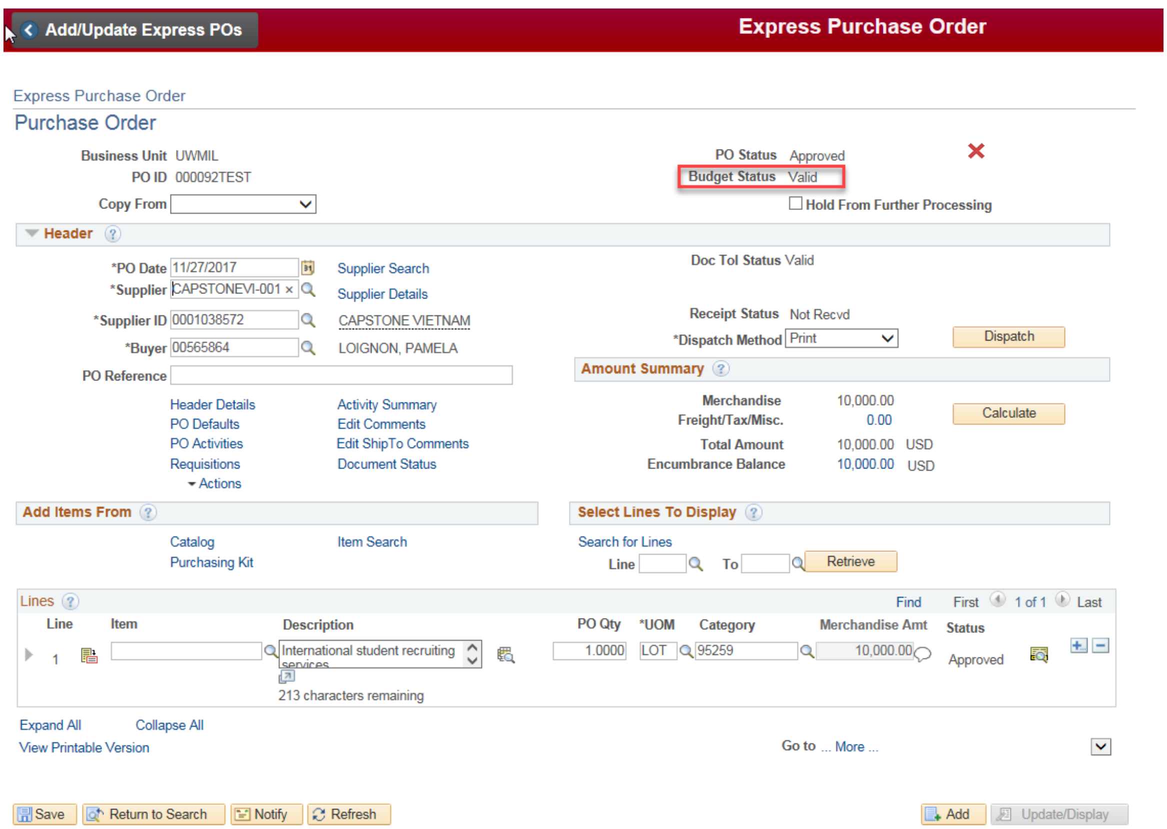


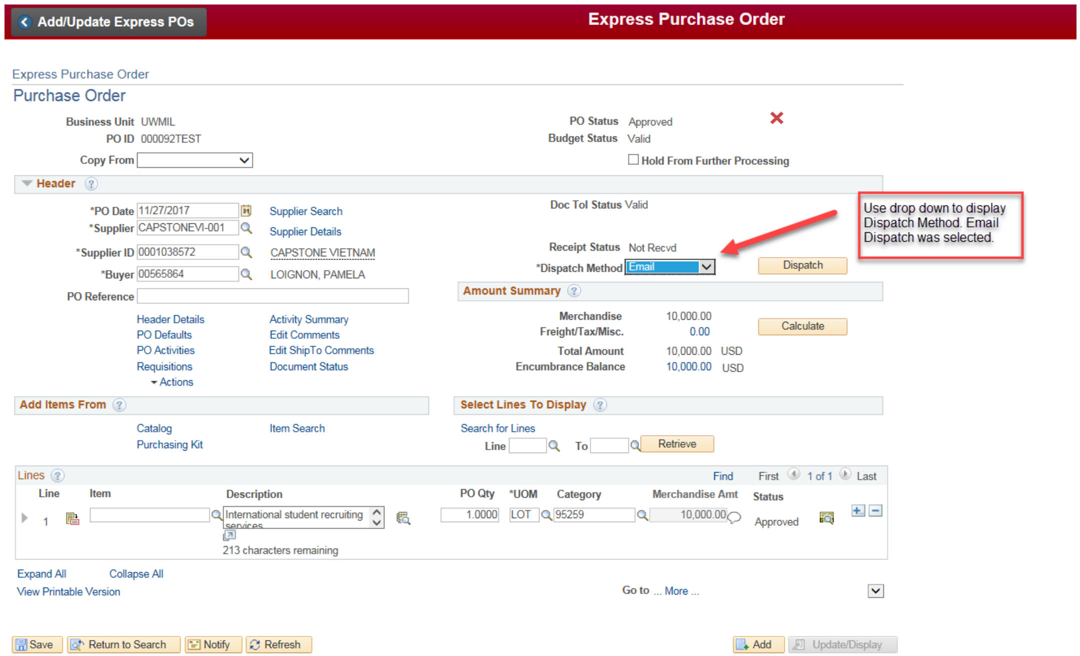
98. Some UW Institutions have Auto Approve. If this feature is not configured at your institution, approve the Purchase Order by clicking the green check box. You are now ready to Budget Check and Dispatch the PO.



VI. Budget Checking and Dispatching POs Online (Applies to Regular and Express Pages)

1. The PO must be at an Approved Status before it can be Budget Checked. Click the icon to initiate the online budget check process. You will see the processing icon spin while the Budget Check process is running via the Ren server. Once it is complete, the page will refresh and display the updated Budget Check status. If the resulting status is Valid, continue to the Dispatch process steps, otherwise refer to the Budget Check Exceptions chapter in the **GL.2.01 – Edit, Budget Check**, and Post Journals business process document.



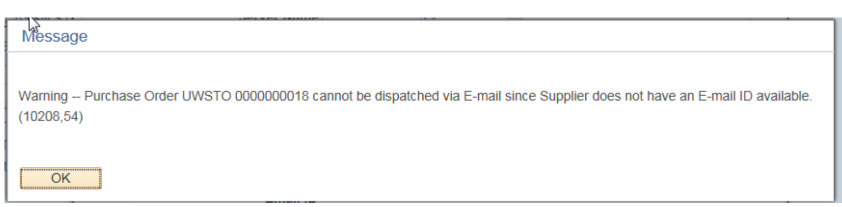


2. Select a Dispatch Method and Click 

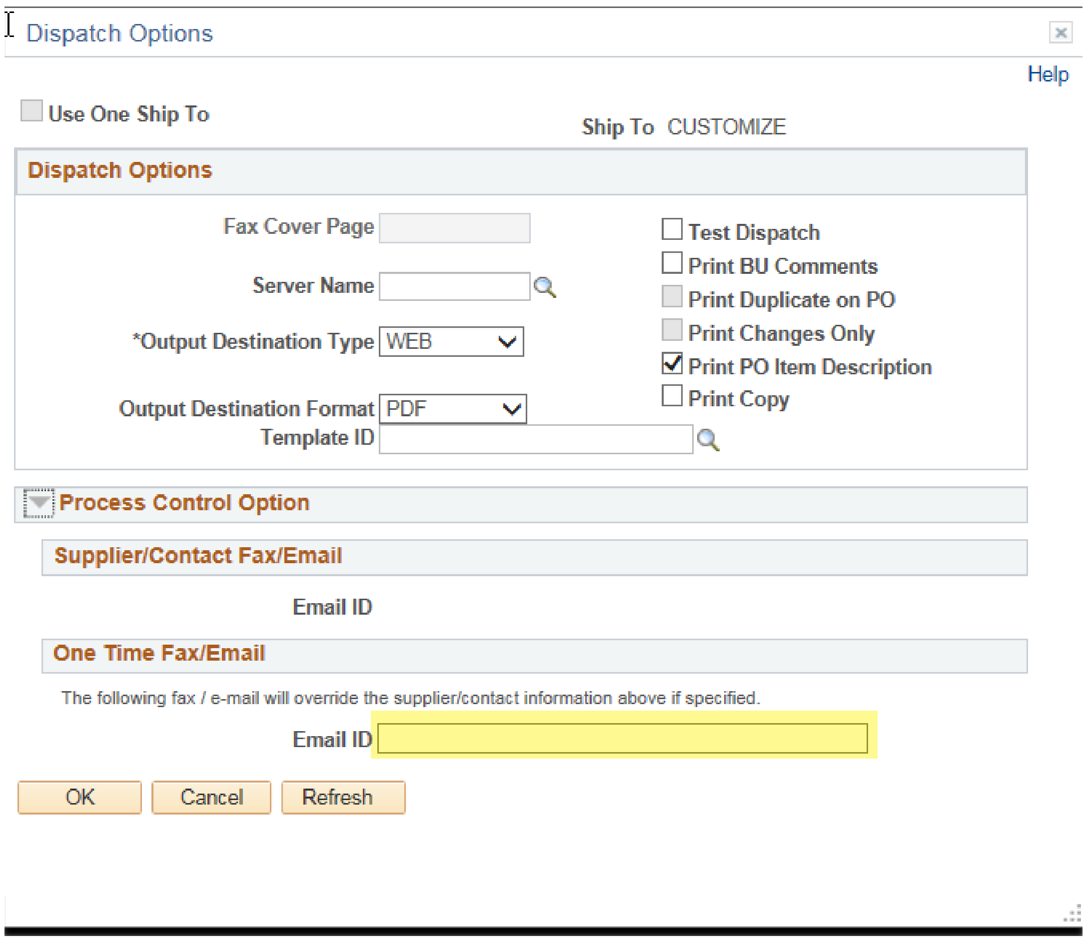
Dispatch Methods (All methods will send a Supplier and Buyer Copy to the Process Monitor and the Report Manager:
   - 'EDX' - Not used at UW.
   - 'Fax' - Not used at UW.
   - 'Phone' – The PO Dispatch report is not created
   - 'Print' – The PO Dispatch report is sent to the Process Monitor and Report Manager
   - 'Email' – Paperless/Electronic Dispatch Method
      i. Requires electronic signature. If interested in this feature, contact UWProblems Solvers.

      ii. Requires the Supplier to have an email address prepopulated. If not prepopulated, enter a onetime override email address upon initiating PO Dispatch. The Supplier copy will go to this address and the Buyer copy will be sent to the Buyers's email address, per the Buyer's operator definition.

      iii. You will get the below message if an email address is not set up.



3. Enter a Supplier email address. The address will be applied only to the PO that is currently in the Dispatch Process.



4. **Select** the *Server Name* ‘PSUNX’, *Output Destination Type* ‘WEB’, and *Output Destination Format* ‘PDF’.

   Option Notes:
   Test Dispatch - Selecting the *Test Dispatch* checkbox will make the PO Dispatch report show *Unauthorized* in the signature area, but still send the PO to the Supplier/Buyer if email dispatch is selected.

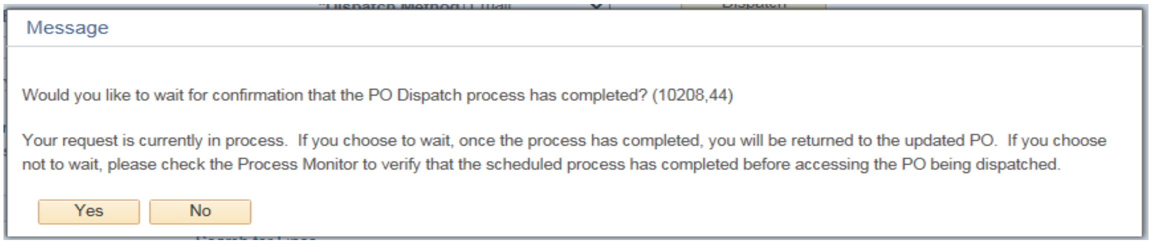
   PO Status will stay Approved.

   Print BU Comments - Does not impact the PO Dispatch report at UW.

   Print PO Item Description -Does not impact the PO Dispatch report at UW.

   One Time Fax/Email section–If using the email Dispatch option, you are able to enter/override the Supplier email address in the editable *Email ID* field.

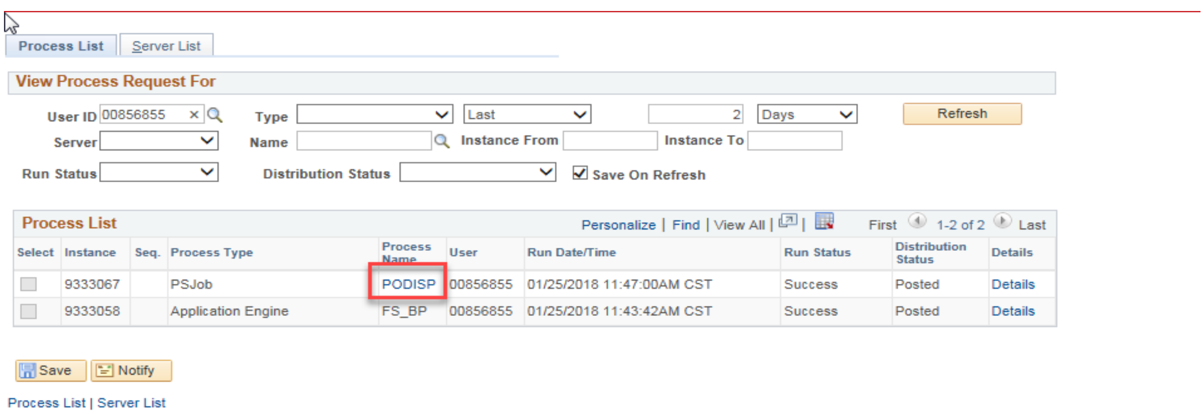
5. **Click** OK to continue and you will receive the following message.



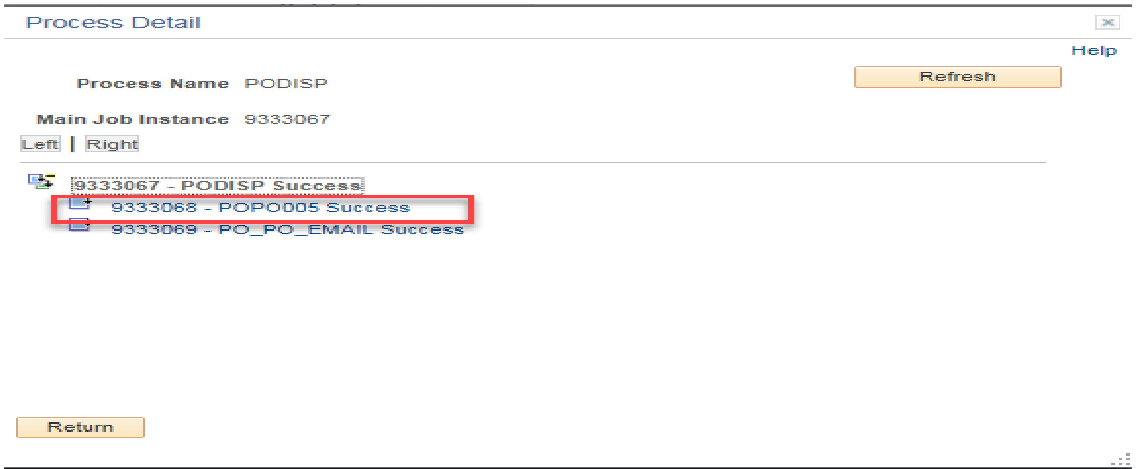
6. If you would like to wait while the PO Dispatches Click Yes or No if you would like to move on and review the process status later on the Process Monitor.

7. You can view the dispatch POs from the Buyers WorkCenter by going to the Reports/Queries section and selecting the Process Monitor link or the Report Manager link. You can also use the Navigator to go to the Process Monitor or Report Manager.

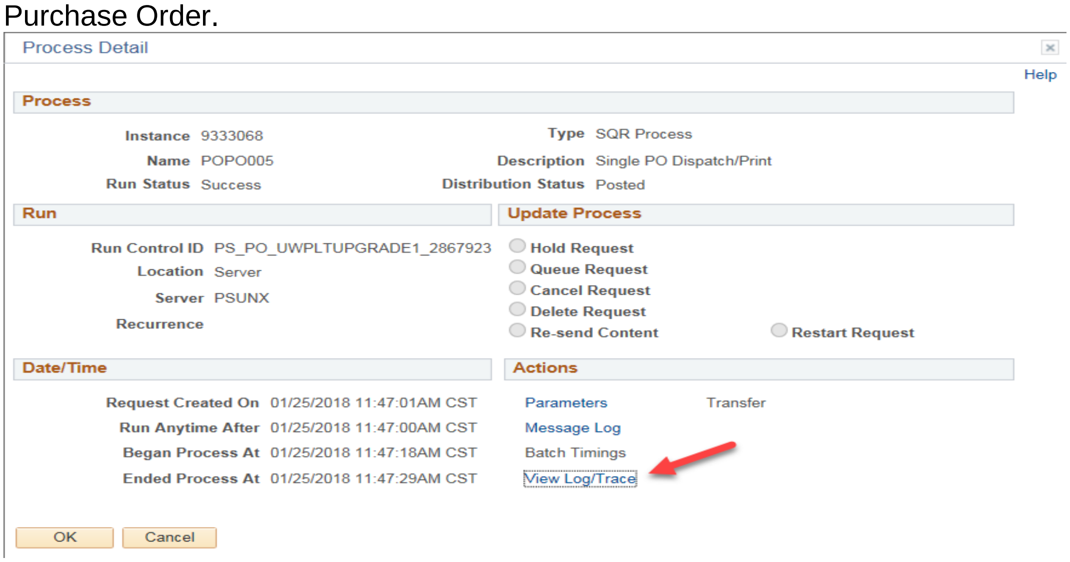
8. Process Monitor navigation
   Navigator: People Tools > Process Scheduler > Process Monitor

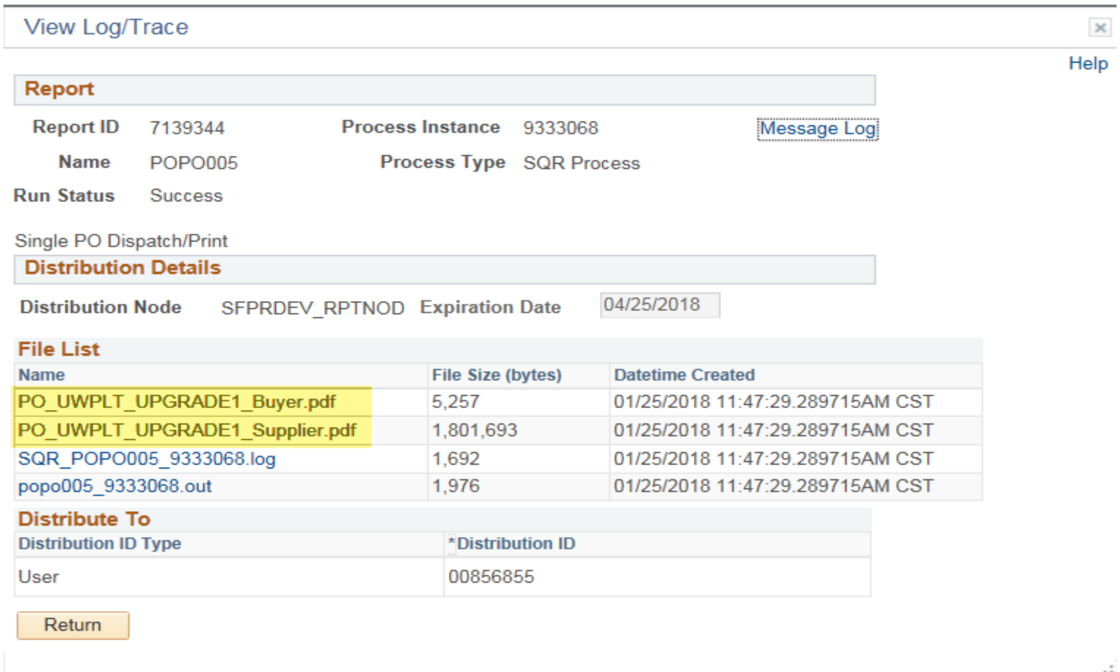


9. Click PODISP and then Click POPO005

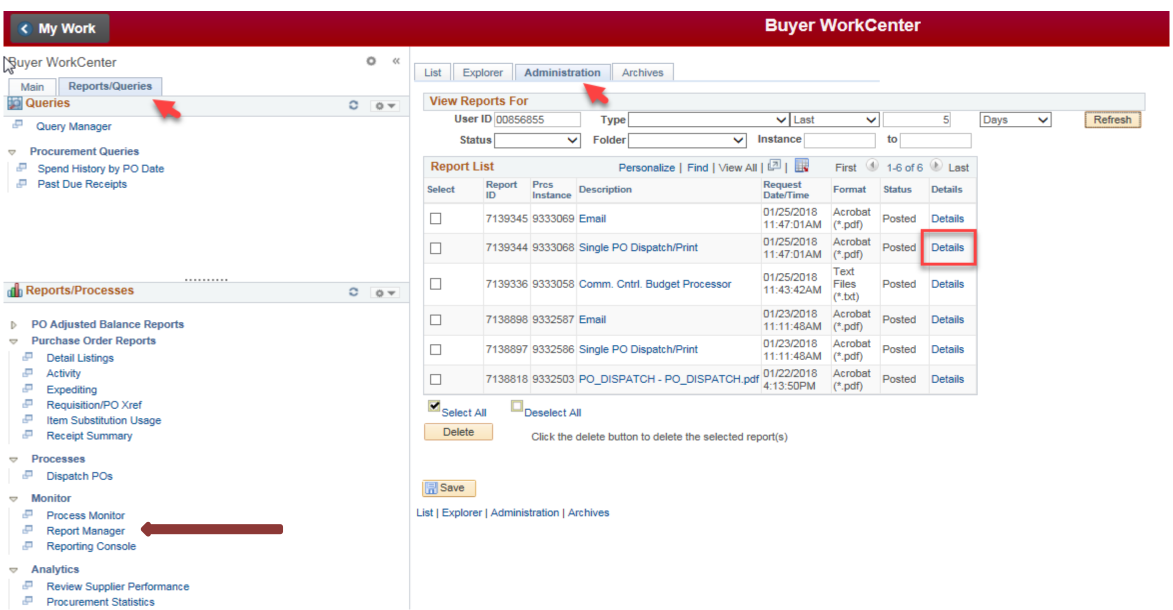


10. After Clicking POPO005, click View Log/Trace to view the Buyer and/or Supplier Copy of the Purchase Order.

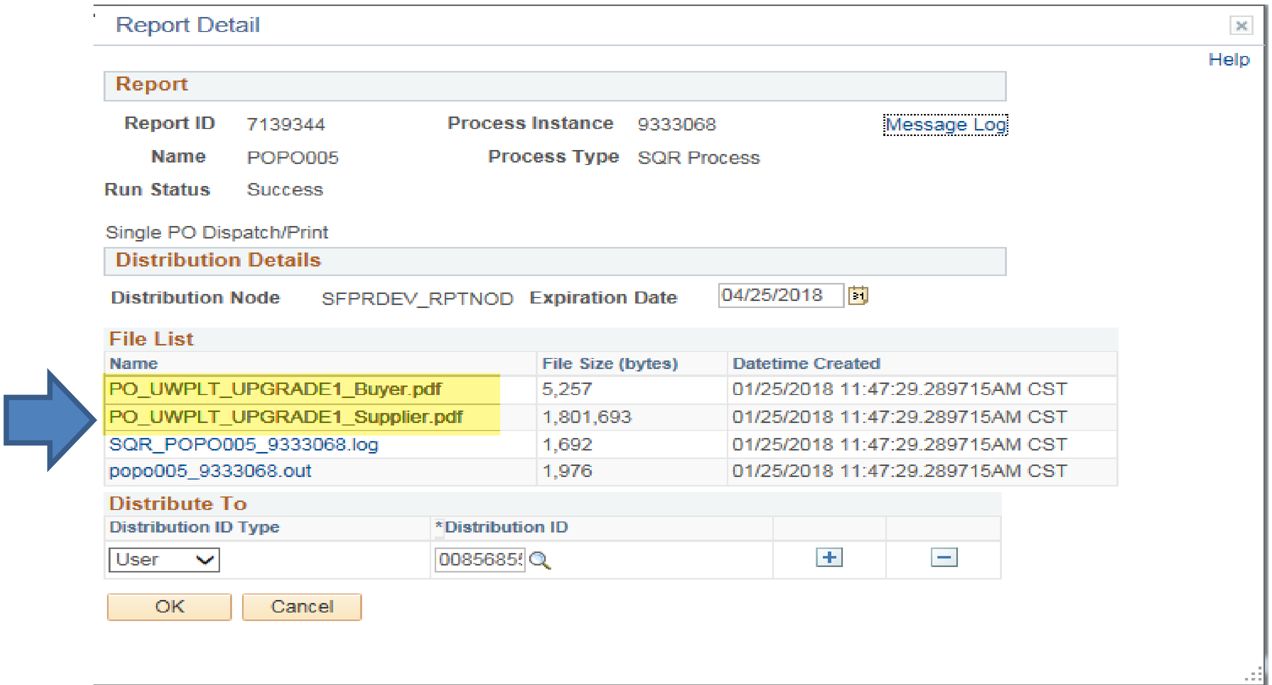




11. Report Manager Navigation Method to view dispatched Purchase Order
Navigator: *Reporting Tools > Reporting Manager*



12. Go to the Administration tab. Click the *Details* link associated with the PO Dispatch Process Instance.

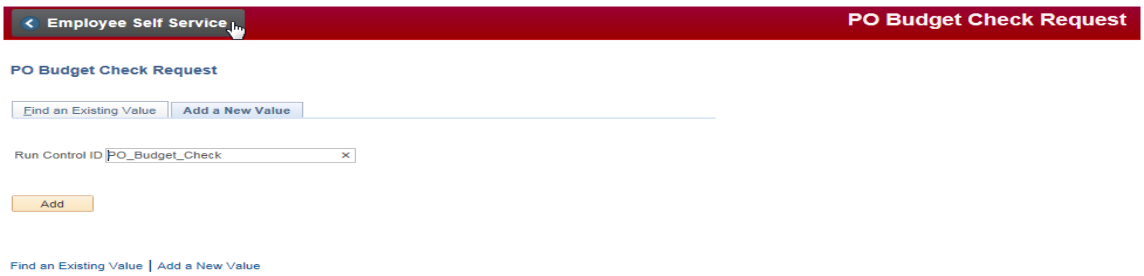


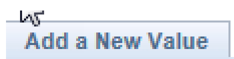
13. The Buyer and Supplier copies of the PO Dispatch report can be found in the *File List* section of the *Report Details* page. Click the one you would like to review.

VII. Budget Checking and Dispatching POs via <u>Batch Process</u>

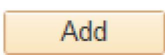
Note: Time can be saved by entering and approving POs online, then running the PO Budget Check process in batch followed by the batch PO Dispatch process. This is especially true for those campuses using PO Dispatch via email. With this process, the user does not have to initiate the budget check and dispatch process for every transaction and wait for the process to run.

Navigation: *Purchasing > Purchase Orders > Budget Check*



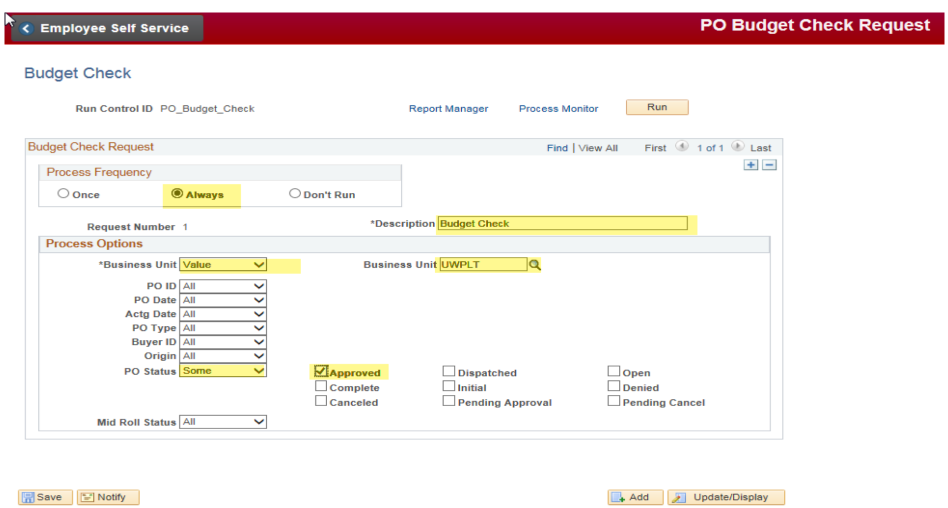
1. **Add** a new run control, **click** 

2. **Enter** a *Run Control ID*.

3. **Click** 

or **use** 

to **search** for an existing run control.



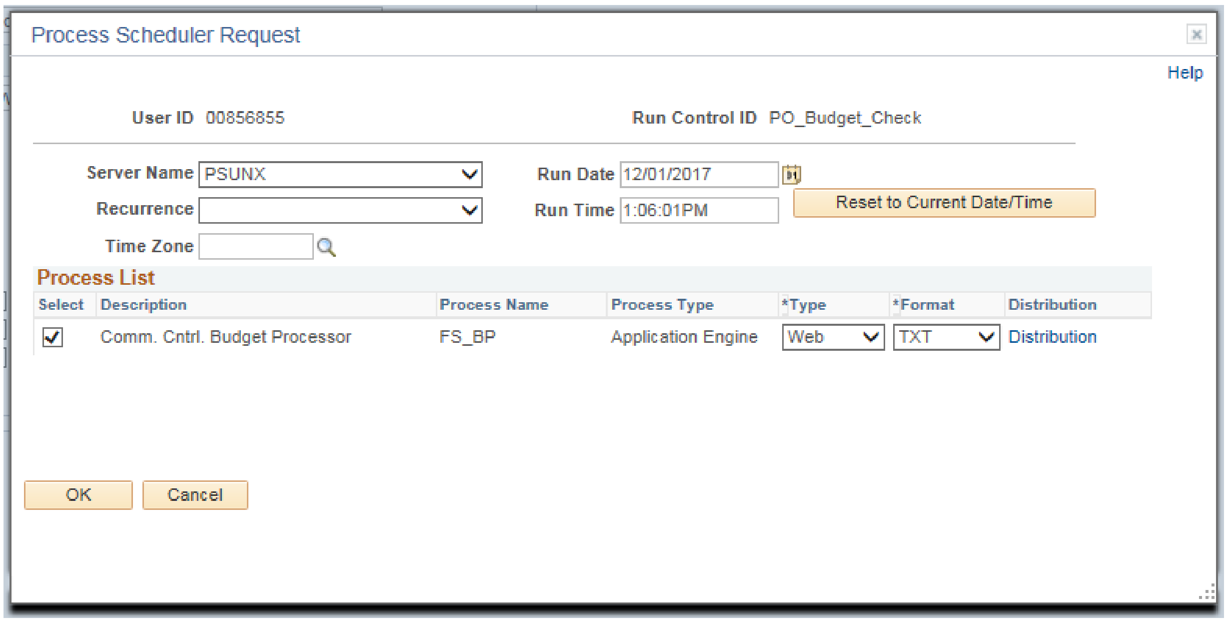
4. **Select** the *Process Frequency* of 'Always'

5. **Enter** a *Description* (example: 'Budget Check')

6. **Select** the *Business Unit* 'Value' dropdown and the *Business Unit* value of your Business Unit (example: 'UWMIL')
Note: Business Unit must be populated as a parameter on this Run Control process. Failure to insert a Business Unit could accidentally process transactions for other Business Units.

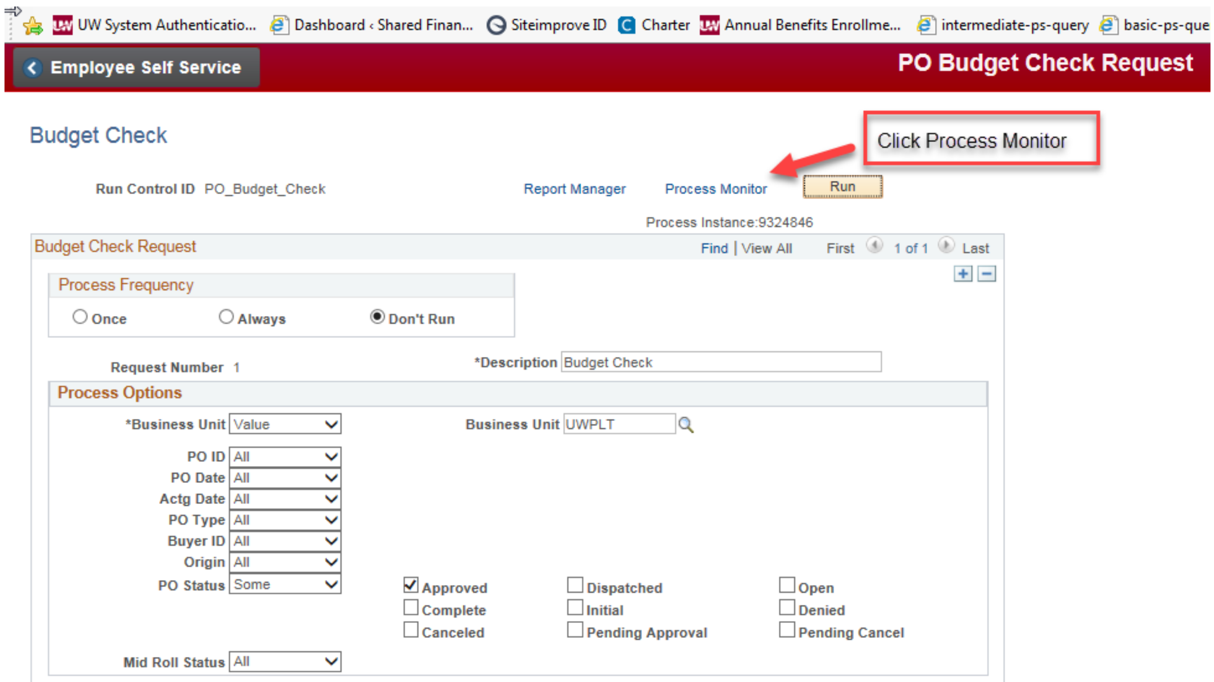
7. **Select** *PO Status* of 'Some' and **check** the options of your choice. With a new PO, **check** the box next to 'Approved'.

8. **Click** Run



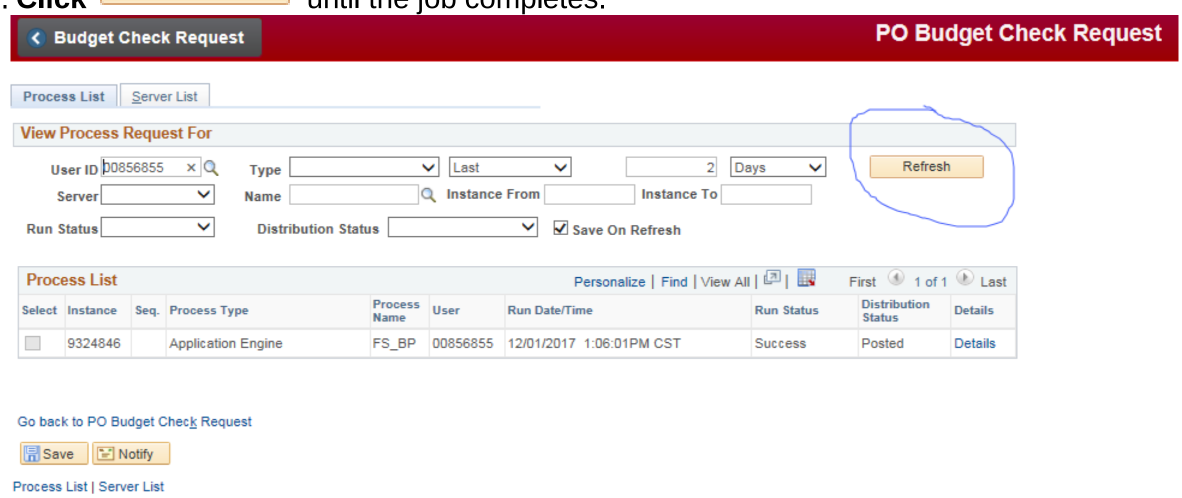
9. **Select** *Server Name* 'PSUNX'

10. **Click** OK . The Process Monitor page will be displayed.



11. **Click** Process Monitor.

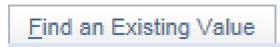
12. **Click** Refresh until the job completes.



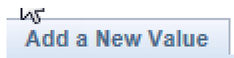
13. After the POs are successfully Budget Checked, **run** the batch PO Dispatch process

14. Access the Dispatch PO page from the Buyer WorkCenter or through navigation.
    Navigation: *Purchasing > Purchase Orders > Dispatch POs*

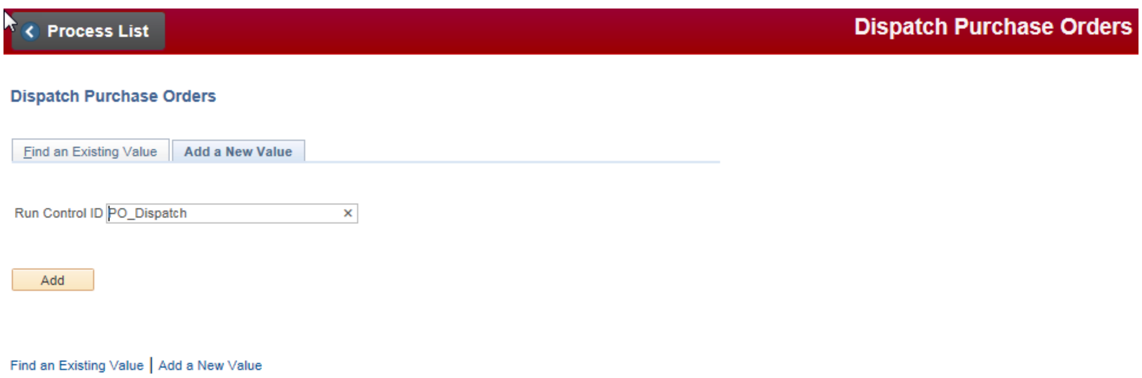
15. Select or create a Run Control ID.

16. If a Run Control already exists, click 

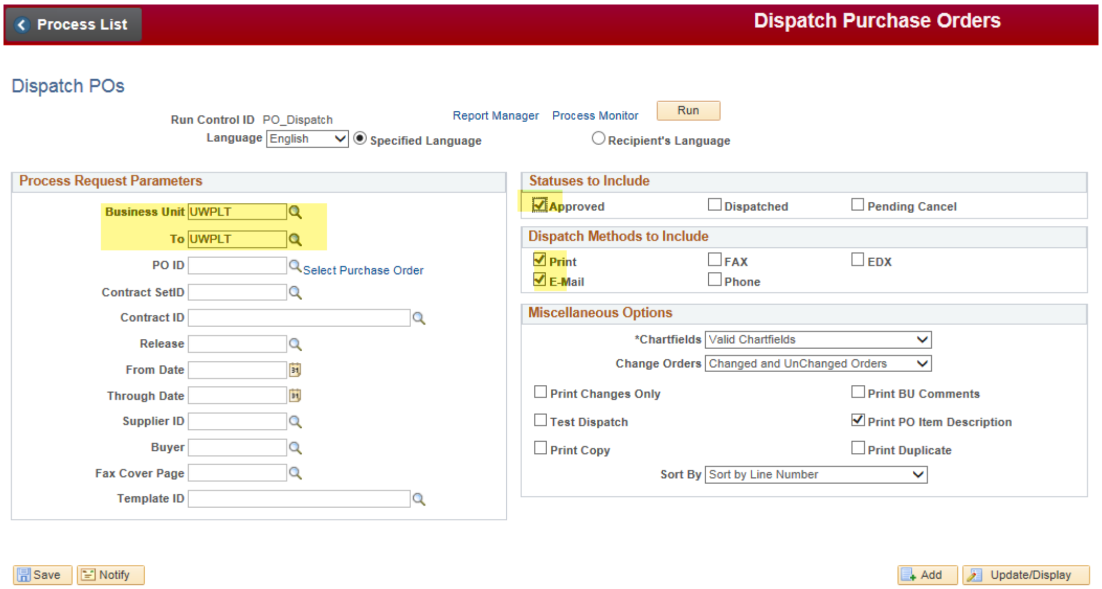
, select the Run Control ID, and skip to step 19. Otherwise go to the next step.

17. To add a New Run Control **Click** 

18. **Enter** *Run Control ID*



19. **Click** Add

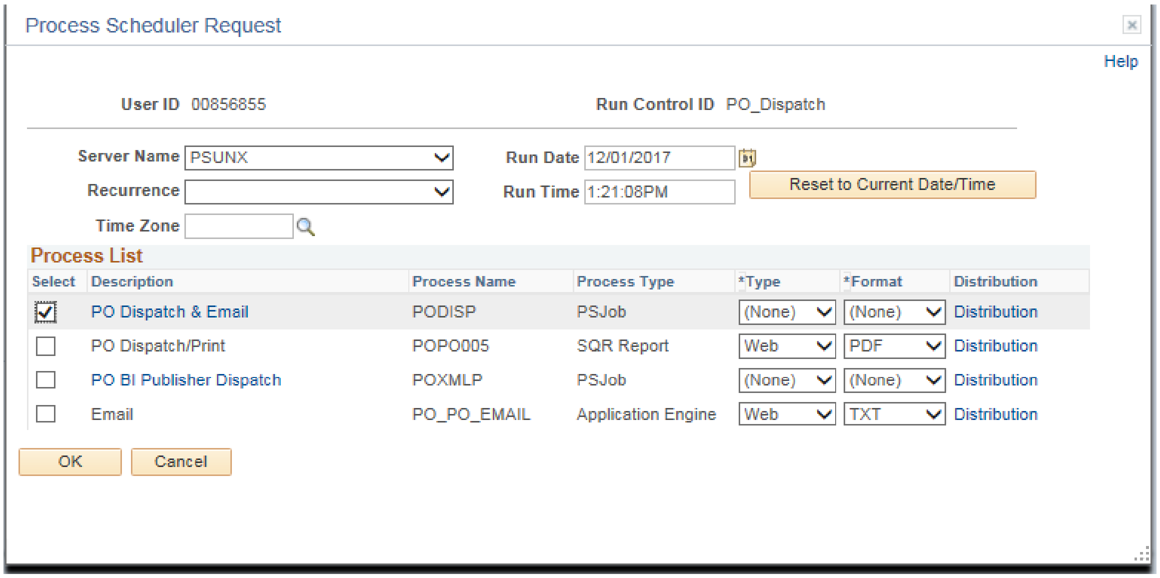


20. **Enter** your *Business Unit* as the from and to value (example: 'UWPLT' To' UWPLT')
Note: It is imperative you populate from and to *Business Unit,* otherwise you may Dispatch all other BU's Purchase Orders.

21. **Select** the *Statuses to Include*. To dispatch newly created POs, check to box next to 'Approved'.

22. **Check** the *Dispatch Methods to Include*. In this case 'Print' and 'E-Mail' were selected.

23. **Click** Run



24. **Select** *Server Name* 'PSUNX'

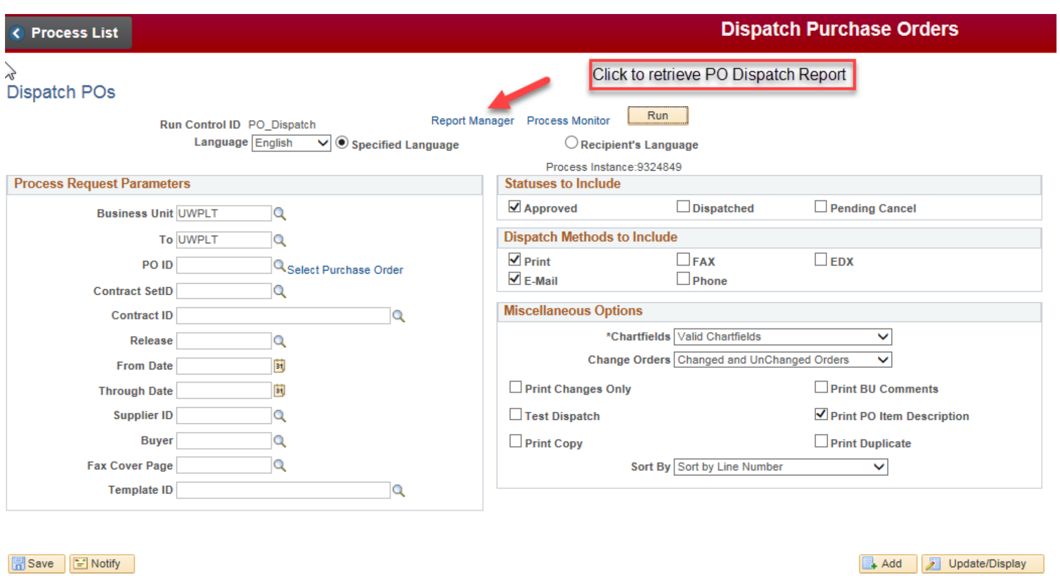
25. Check the box for *PO Dispatch & Email* job

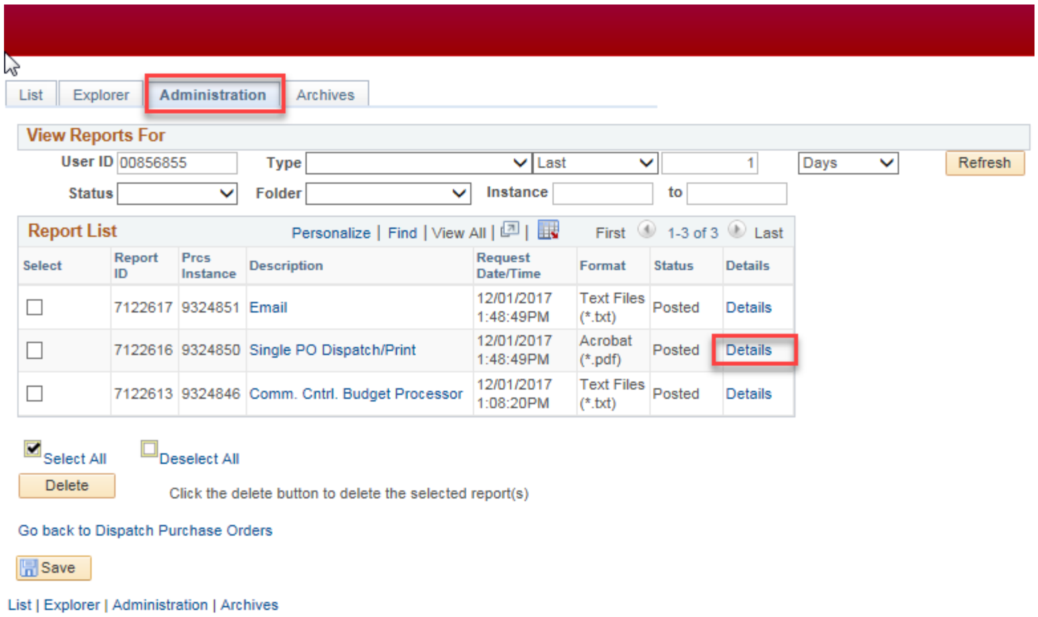
26. **Click** OK

27. The Dispatch Purchase Orders Page will be displayed.

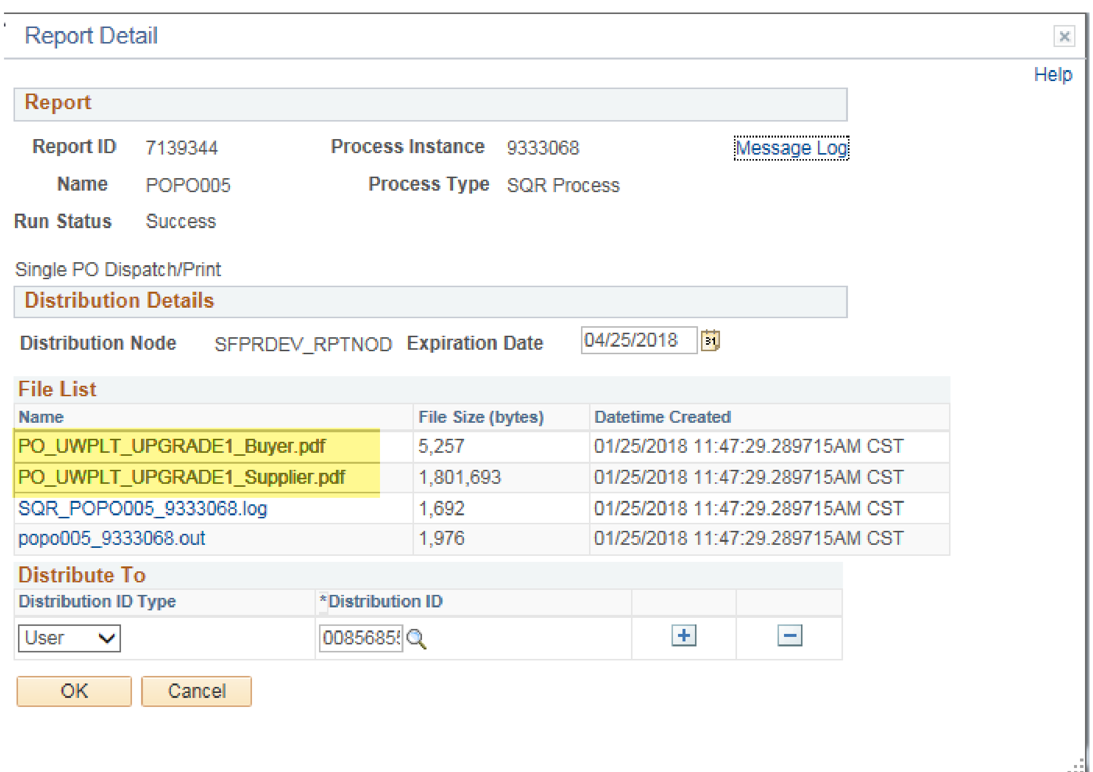
28. Click on Reporting Manager to retrieve the PO Dispatch reports. Navigation can also be used to retrieve the reports.

    Navigator: *Reporting Tools > Reporting Manager*





29. **Click** the Administration tab and **Click** the *Detail*s link associated with the PO Dispatch Process Instance.



30. The Buyer and Supplier copies of the PO Dispatch report can be found in the *File List* section of the *Report Details* page.

Appendix

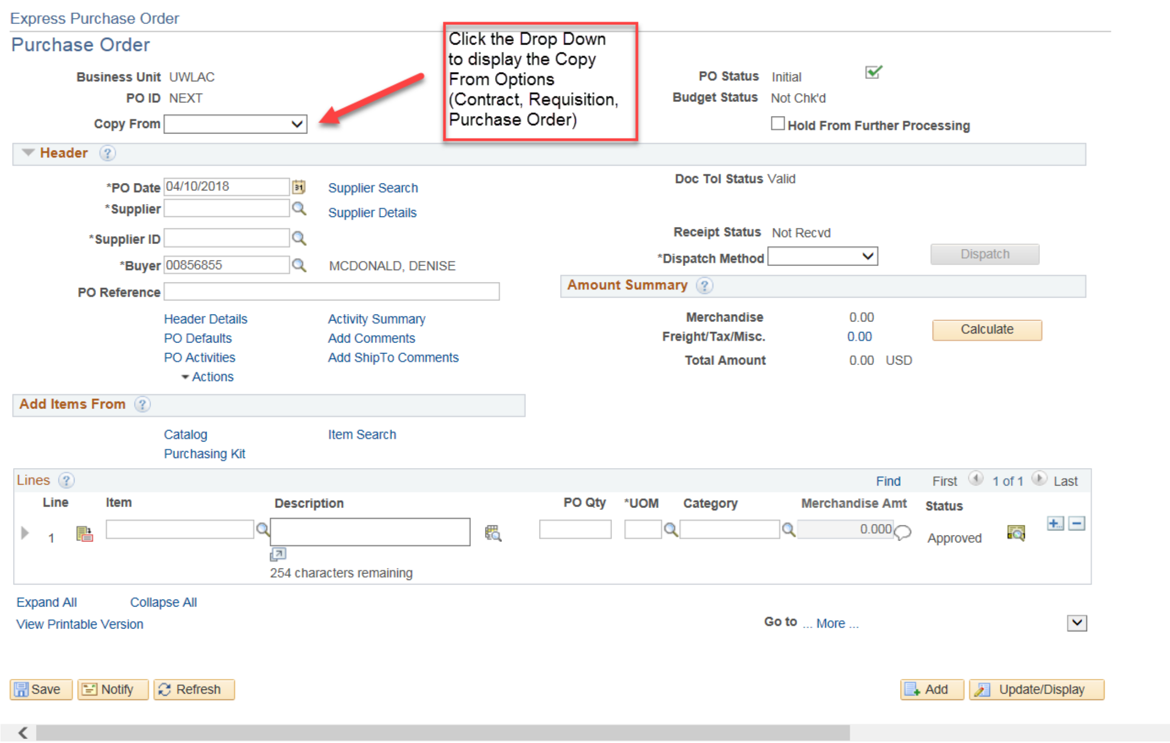
VIII. Using the "Copy From" option to create Purchase Orders

The "Copy From" option is an efficient way to create Purchase orders. It allows you to take an existing Contract, Requisition, or Purchase Order, and use it to create a new purchase order. You can keep the copied in components of the document or make updates as needed.

To Matching Institutions - If you copy in a PO that <u>does not</u> have matching, it <u>cannot</u> be changed to a matching purchase order.

1. From the Express or Regular Entry page, Click the Add a New Value tab and Click Add

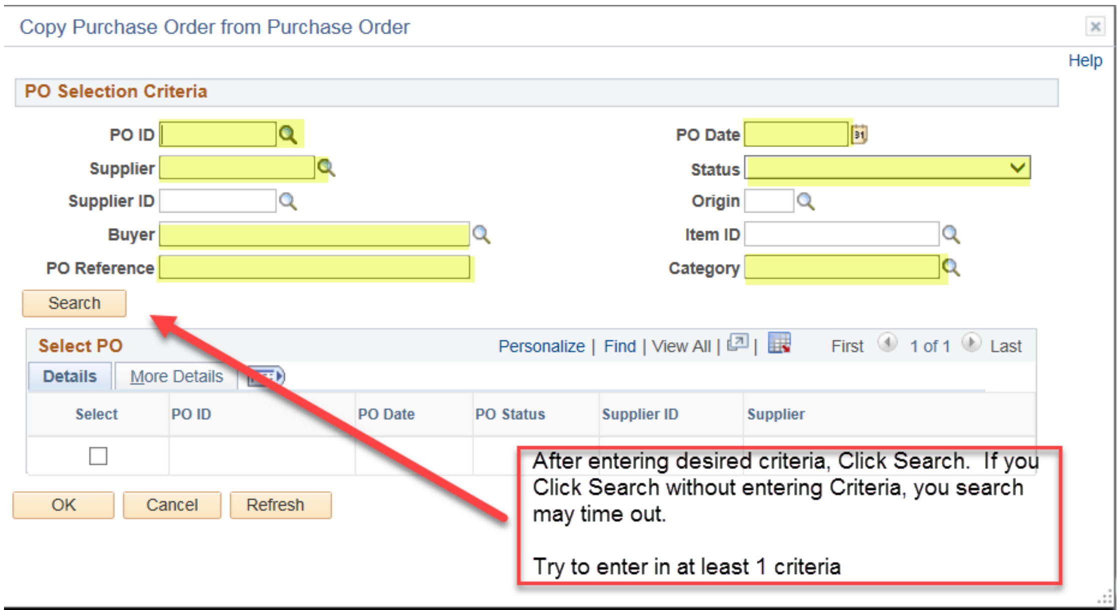
2. The Purchase Order Entry Page will be displayed.



3. Click the Copy From drop down. It will display the documents available for copy. See the below.
   a. Contract – currently not being used by UW Institutions

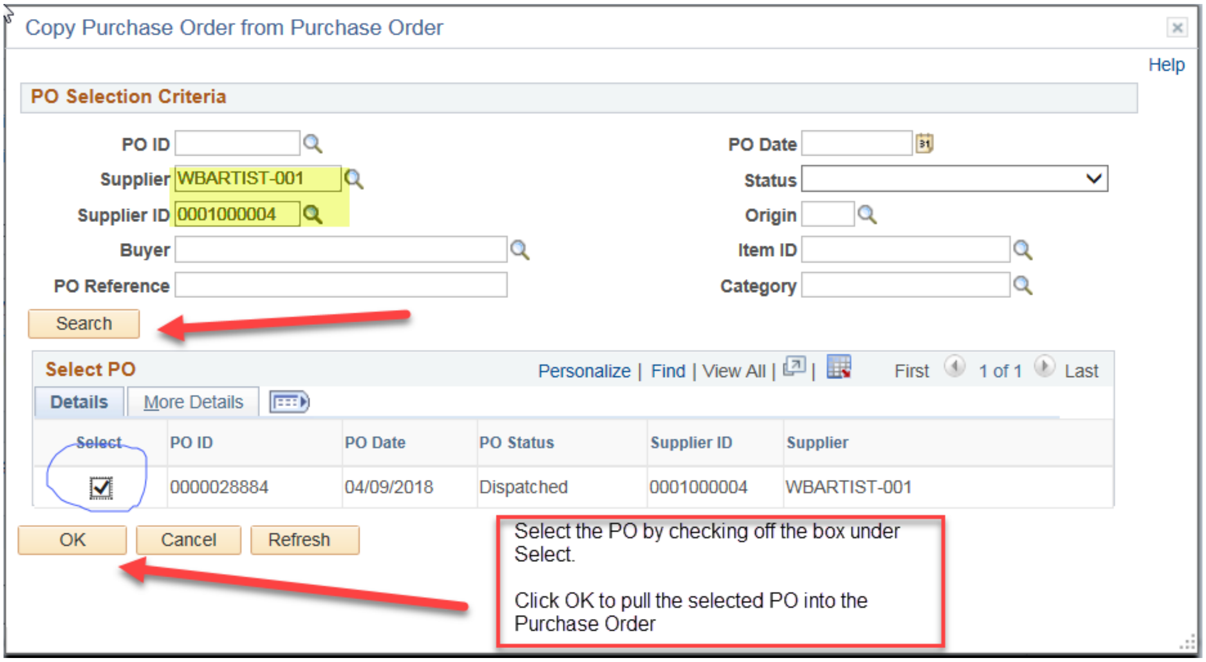
   b. Requisition – only available for UW Institutions using eProcurement
      i. *A Supplier Name must be selected first before using the Copy From Requisition Option*
   c. Purchase Order – available to all UW Institutions

4. Assuming Purchase Order was selected, the most common "Copy From" option, the below screen will appear.



5. Enter in criteria. Try to enter in at least 1 criteria, to prevent your search from timing out.

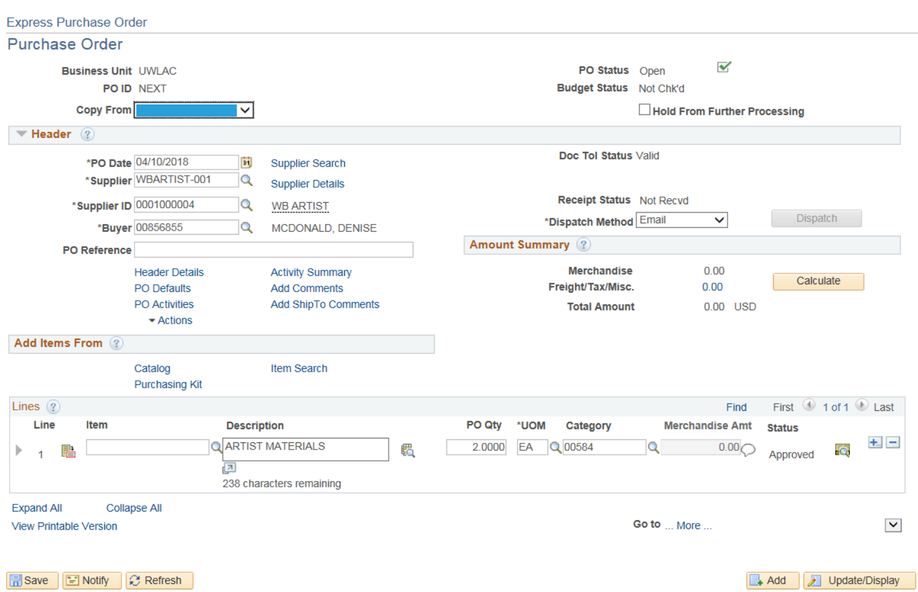
6. **Click** Search.



7. Depending on your search criteria, PO(s) should appear in the Select PO section. Check off the PO you want to pull into the Purchase Order

8. **Click** OK.

9. The Main Purchase Order Page will be displayed.



10. You will notice the Purchase Order has been populated. Make changes/updates if necessary and continue with the normal PO creation process (Express or Regular Entry).

Revision History

Author	Version	Date	Description of Change
Martha Mendoza	1.0	12/06/2012	Initial Draft
Spencer Kelsay	1.1	03/19/2013	Mostly updated screenshots
Mark Flemington	2.0	06/04/2013	9.1 Related Content Updates
Susan Kincanon	2.1	06/05/2013	Review, and format
Susan Kincanon	2.2	06/12/2013	Finalize and publish to website
Mark Flemington	2.3	09/04/2013	Updates and clarifications
Susan Kincanon	2.4	09/04/2013	Format, finalize, and republish
Mark Flemington	2.5	10/10/2013	Additional supplemental detail
Susan Kincanon	2.6	10/11/2013	Finalize and republish to website
Mark Flemington	2.7	10/17/2013	Additional detail
Susan Kincanon	2.8	10/17/2013	Finalize and republish to website
Denise McDonald	2.9	4/10/2018	9.2 Upgrade
Denise Mcdonald	3.0	07/19/2018	UAT updates
Denise Mcdonald	3.1	08/17/2018	UAT updates