



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

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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.

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

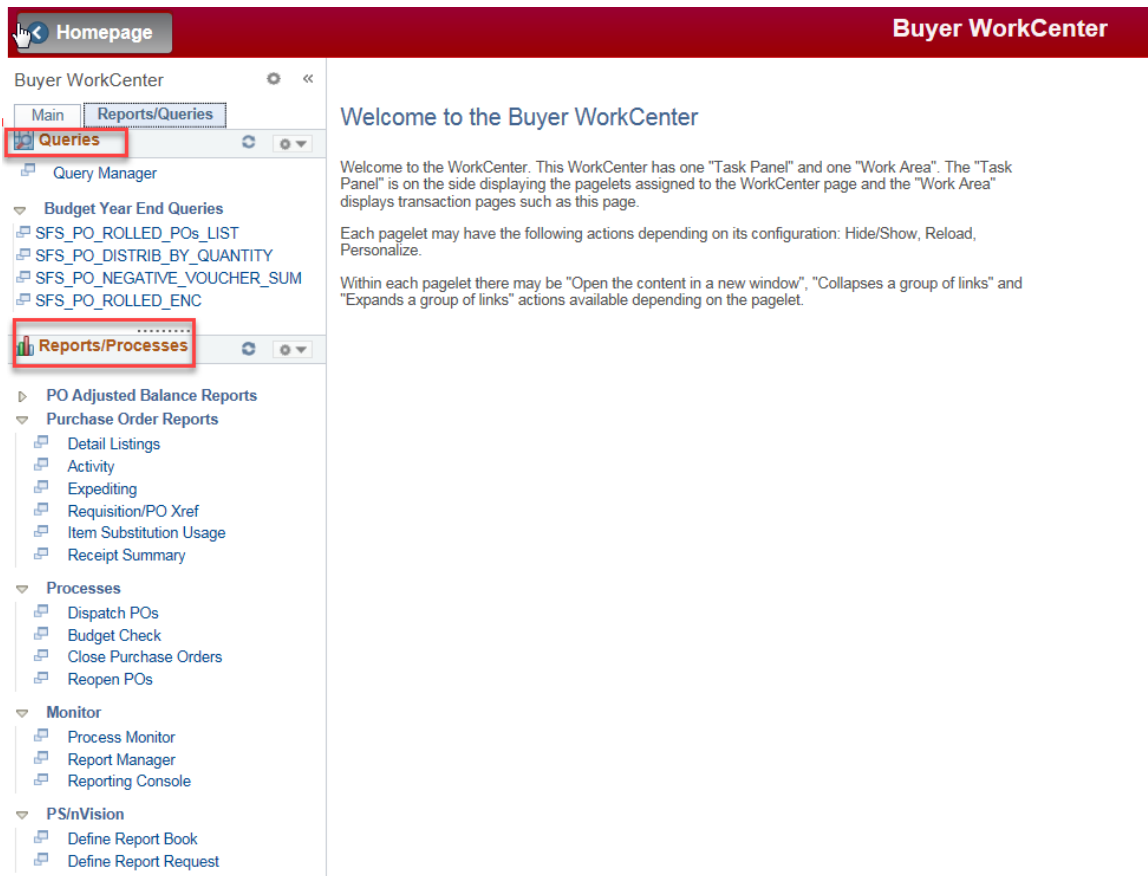
Welcome to the Buyer WorkCenter

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

Express Purchase Order

Express Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Keyword Search** | Add a New Value

▼ Search Criteria

Business Unit = [UWMIL] [x] [Q]

PO ID begins with []

Purchase Order Date = [] [B]

PO Status = [] [v]

Short Supplier Name begins with [] [Q]

Supplier ID begins with [] [Q]

Supplier Name begins with [] [Q]

Buyer begins with [] [Q]

Buyer Name begins with [] [Q]

PO Type = [] [v]

Purchase Order Reference begins with []

Hold From Further Processing

Case Sensitive

Search Clear Basic Search [Q] Save Search Criteria

Find an Existing Value | Keyword Search | Add a New Value

Use the magnifying glass to select a Business Unit.
Click the Keyword Search tab

The Keyword Search screen will appear.

Express Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

This search definition must be indexed in order to use Keyword Search [Search Tips](#)

▼ **Search Criteria**

Keywords

Business Unit =
 PO ID contains phrase ▼
 Purchase Order Date =
 PO Status =
 Short Supplier Name contains phrase ▼
 Supplier ID contains phrase ▼
 Supplier Name contains phrase ▼
 Buyer contains phrase ▼
 Buyer Name contains phrase ▼
 PO Type =
 Purchase Order Reference contains phrase ▼
Hold From Further Processing

You can enter any criteria to find a purchase order

Business Unit Description: contains phrase ▼
 Additional Name: contains phrase ▼
 Budget Status - NonProrated: contains phrase ▼
 Budget Checking Header Status: contains phrase ▼
 Origin: contains phrase ▼
 Item ID: contains phrase ▼
 Item Description: contains phrase ▼
 Category ID: contains phrase ▼
 Category Code: contains phrase ▼
 Category Description Short: contains phrase ▼
 Merchandise Amount: = ▼

Supplier Item ID:	contains phrase ▼	<input type="text"/>
Manufacturer ID:	contains phrase ▼	<input type="text"/>
Manufacturer's Item ID:	contains phrase ▼	<input type="text"/>
Manufacturer Name:	contains phrase ▼	<input type="text"/>
Manufacturer Short Name:	contains phrase ▼	<input type="text"/>
Line Status:	contains phrase ▼	<input type="text"/>
Ship To Location:	contains phrase ▼	<input type="text"/>
Ship To Location Description:	contains phrase ▼	<input type="text"/>
Ship To Description Short:	contains phrase ▼	<input type="text"/>
Due Date:	= ▼	<input type="text"/> ⓘ
RFQ ID:	contains phrase ▼	<input type="text"/>
Attention To:	contains phrase ▼	<input type="text"/>
Backorder Status:	contains phrase ▼	<input type="text"/>
Contract ID:	contains phrase ▼	<input type="text"/>
GPO Contract:	contains phrase ▼	<input type="text"/>
Requisition ID:	contains phrase ▼	<input type="text"/>
Return To Vendor (Supplier) ID:	contains phrase ▼	<input type="text"/>
Sales Order:	contains phrase ▼	<input type="text"/>
Work Order ID:	contains phrase ▼	<input type="text"/>
Event ID:	contains phrase ▼	<input type="text"/>
Entered By:	contains phrase ▼	<input type="text"/>
Procurement Comments:	contains phrase ▼	<input type="text"/>

[Keyword Only](#)
[Basic Search](#)

[Find an Existing Value](#) |
 [Keyword Search](#) |
 [Add a New Value](#)

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*

Employee Self Service Purchase Order

Purchase Order

Find an Existing Value | Keyword Search | Add a New Value

Business Unit

PO ID

Find an Existing Value | Keyword Search | Add a New Value

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

Employee Self Service Purchase Order

Maintain Purchase Order

Purchase Order

Business Unit UWPLT
 PO ID NEXT
 Copy From [dropdown]

PO Status Initial
 Budget Status Not Chk'd
 Hold From Further Processing

Header

*PO Date 11/17/2017 Supplier Search
 *Supplier [input] Supplier Details
 *Supplier ID [input]
 *Buyer 00856855 MCDONALD, DENISE
 PO Reference [input]

Doc Tol Status Valid
 Receipt Status Not Recvd
 *Dispatch Method [dropdown] Dispatch

Amount Summary

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Actions

Add Items From

Catalog Item Search
 Purchasing Kit

Lines

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	[input]	[input]	[input]	[input]	[input]	0	0.000	Approved

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

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.***

PO Header Details Help

PO Details

Supplier 3MSAFETY-001 PO Date 11/17/2017
 *PO Type GEN Budget Status Not Chk'd
 *Billing Location PLTBILLTC Billing Address Tax Exempt
 ID
 Origin Letter of Credit ID
 Use One Ship To Ship To


Currency

Currency Code USD Exchange Rate Detail Base Currency USD
 Rate Date 11/17/2017 Exchange Rate 1.00000000
 Rate Type CRRNT

Process Control Option

Dispatch Acknowledgements required for Not required
 *Method Print Accounting Date 11/17/2017
 Template ID Accounting Template STANDARD

OK Cancel Refresh


8. Make required updates.
9. Click 
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.

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		test item	2.0000	EA	05000	50,000.00000	100,000.00	Approved

View Printable Version
 View Approvals
 Save Return to Search Notify Refresh Add Update/Display


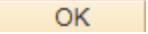
12. Click the *PO Defaults* hyperlink, if desired. You must enter an item description and quantity if using PO Defaults.

13. Select the *Default* or *Override* radio button.
- Default** – Select for single line distribution defaults
 - 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.
- 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  tab blank as assets will only be integrated to Asset Management through Accounts Payable Vouchers.
27. **Click**  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.

Standard Comments

Comments

*Action: Copy Comment

Comment Type:

Comment ID:

*Effective Date: 11/17/2017

*Status: Active

Description:

Short Desc:

Comments:

OK Cancel Refresh

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

Standard Comments

Comments

*Action: Copy Comment

Comment Type: PO

Comment ID: 008

*Effective Date: 11/17/2017

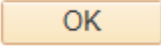
*Status: Active


Description: Blanket CONTRACT

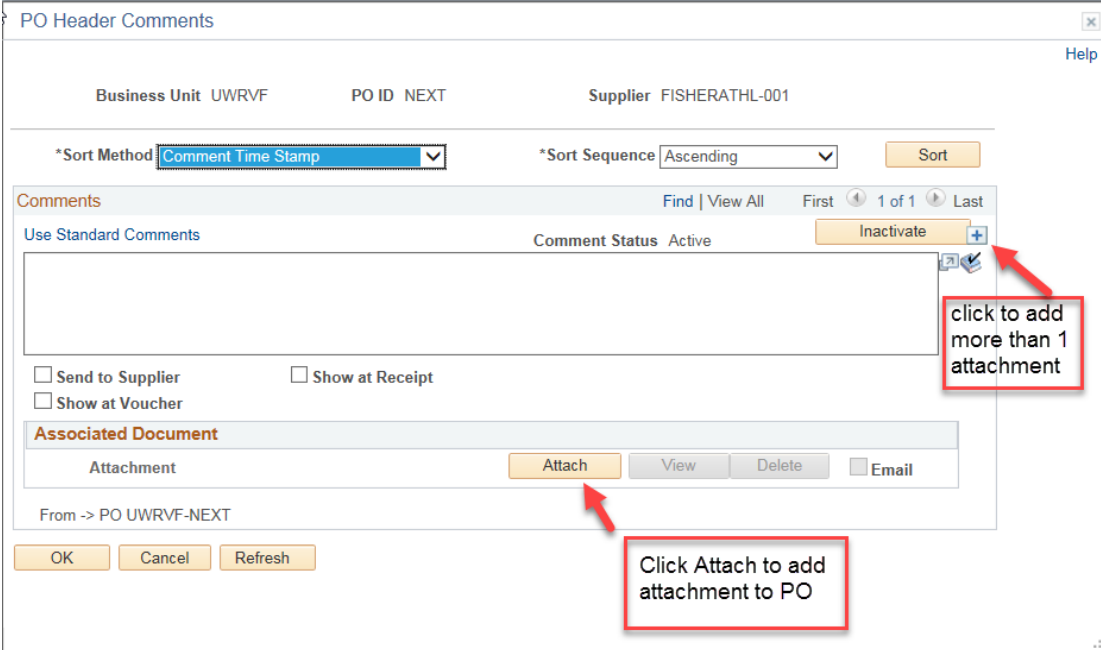
Short Desc: Blanket CO

Comments: Contract blanket order to cover purchases as needed for the period July 1, 2014 through June 30, 2015 for the following department:
 All purchases to be authorized by:
 Vendor to submit itemized monthly invoices (INCLUDING PO #) directly to billing address indicated above.

OK Cancel Refresh

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

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



The screenshot shows the 'PO Header Comments' window. At the top, it displays 'Business Unit UWRVF', 'PO ID NEXT', and 'Supplier FISHERATHL-001'. Below this, there are dropdown menus for '*Sort Method' (set to 'Comment Time Stamp') and '*Sort Sequence' (set to 'Ascending'), with a 'Sort' button. The 'Comments' section includes a search bar, 'Find | View All', 'First', '1 of 1', and 'Last'. There is a checkbox for 'Use Standard Comments' and a 'Comment Status' dropdown set to 'Active'. An 'Inactivate' button with a plus sign is highlighted with a red box and an arrow pointing to it, with a callout box that says 'click to add more than 1 attachment'. Below the comments section, there are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section has an 'Attachment' field, an 'Attach' button (highlighted with a red box and arrow), and 'View', 'Delete', and 'Email' buttons. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons. A callout box at the bottom right says 'Click Attach to add attachment to PO'.

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

PO Header Comments

Business Unit UWRVF PO ID NEXT Supplier FISHERATHL-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View 1 First 1-2 of 2 Last

Use Standard Comments Comment Status Active Inactivate +

Please see included terms and conditions.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment acct_3781_and_3780_activity_11-29-2017.xlsx Attach View Delete Email

From -> PO UWRVF-NEXT

Use Standard Comments Comment Status Active Inactivate +

testing adding comments

Send to Supplier Show at Receipt
 Show at Voucher


Checkoff Email to send attachment to both the Buyer and Supplier

Associated Document

Attachment test_dispatch.docx Attach View Delete Email

From -> PO UWRVF-NEXT

OK Cancel Refresh

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

Employee Self Service **Purchase Order**

Maintain Purchase Order
 Purchase Order

Business Unit UWPLT PO Status Approved
 PO ID NEXT Budget Status Not Chk'd
 Copy From Hold From Further Processing

Header Doc Tot Status Valid

*PO Date 11/17/2017 Supplier Search
 *Supplier 3MSAFETY-001 Supplier Details
 *Supplier ID 000000007 3M SAFETY & SECURITY SYSTEM
 *Buyer 00856855 MCDONALD, DENISE

PO Reference

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Edit ShipTo Comments
 Actions

Amount Summary Receipt Status Not Recvd

*Dispatch Method Print Dispatch

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Add Items From Item Search

Catalog Purchasing Kit


Lines Personalize Find View All First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1						0	0.000	Approved

View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

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.

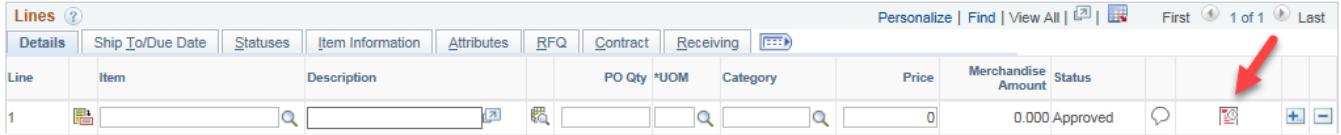
Message




The PO Qty will be 1 for an amount only line, the system will recalculate the merchandise amount (10200,273)


The PO Quantity will be 1 for an amount only line, the system will recalculate the merchandise amount, Continue?

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



Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1						0	0.000	Approved			

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.

Employee Self Service
Purchase Order

Maintain Purchase Order

Schedules


Unit UWPLT Supplier 3MSAFETY-001 PO Status Approved
 PO ID NEXT PO Date 11/17/2017

[Return to Main Page](#)

Line	Item	Description	PO Qty	Merchandise Amt
1			100.0000	1,000.00 USD

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	11/01/2018	AUDITOR	100.0000	10.00000	1,000.00	Active

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.

Distributions for Schedule 1

Unit UWPLT Supplier 3MSAFETY-001
 PO ID NEXT Item Consulting Services
 Line 1
 Schedule 1 Status Active

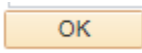
*Distribute By: Quantity

SpeedChart: Multi-SpeedCharts

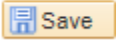
Schedule Qty: 100.0000
 Merchandise Amount: 1,000.00 USD
 Doc. Base Amount: 1,000.00 USD

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Fund	Dept	Program	Class	PC Bus Unit
1	Open	100.0000	100.0000	1,000.00	USD	UWPLT	2480	136	213630	F		

47. Click



48. Click



. 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. If adding negative amounts, make sure the total amount on the PO is greater than zero.

Purchase Order

Maintain Purchase Order

Purchase Order

Business Unit UWPLT PO ID NEXT PO Status Approved Budget Status Not Chk'd

Copy From [dropdown] Hold From Further Processing

Header

*PO Date 11/17/2017 Supplier Search Doc Tol Status Valid

*Supplier 3MSAFETY-001 Supplier Details

*Supplier ID 000000007 3M SAFETY & SECURITY SYSTEM Receipt Status Not Recvd

*Buyer 00856855 MCDONALD, DENISE *Dispatch Method Print Dispatch

PO Reference [input]

Amount Summary

Merchandise	1,000.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	1,000.00 USD	

Add Items From

Catalog Item Search Purchasing Kit

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	[input]	Consulting Services	100.0000	EA	01045	10.00000	1,000.00	Approved

View Printable Version Close Short All Lines *Go to [dropdown]

Save Notify Refresh Add Update/Display

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.

Purchase Order

Business Unit UWLAC PO ID 0000028890 PO Status Open Budget Status Not Chk'd

Copy From [dropdown] Hold From Further Processing

Click to Approve Purchase Order

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 cannot 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*

PO Form Express Purchase Order

Express Purchase Order

Find an Existing Value | Keyword Search | Add a New Value

Business Unit UWPLT

PO ID NEXT

Add

Find an Existing Value | Keyword Search | Add a New Value

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

Express Purchase Order

Business Unit UWPLT PO ID NEXT

PO Status Initial Budget Status Not Chk'd

Copy From [dropdown] Hold From Further Processing

Header

*PO Date 11/17/2017 Supplier Search Doc Tol Status Valid

*Supplier [input] Supplier Details

*Supplier ID [input]

*Buyer 00856855 MCDONALD, DENISE Receipt Status Not Recvd

PO Reference [input] *Dispatch Method [dropdown] Dispatch

Amount Summary

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Actions

Add Items From

Catalog Item Search
 Purchasing Kit

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	[input]	[input]	[input]	[input]	[input]	0.000	Approved

254 characters remaining

Expand All Collapse All View Printable Version Go to ... More ...

Save Notify Refresh Add Update/Display

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.***

PO Header Details

PO Details

Supplier: ABBINDUSTR PO Date: 11/17/2017
 *PO Type: GEN Budget Status: Not Chk'd
 *Billing Location: PLTBILLTC Billing Address Tax Exempt
 Origin: ID:
 Use One Ship To Letter of Credit ID: Ship To:

Currency

Currency Code: USD Exchange Rate Detail Base Currency: USD
 Rate Date: 11/17/2017 Exchange Rate: 1.00000000
 Rate Type: CRRNT

Process Control Option

Dispatch Acknowledgements required for: Not required
 *Method: Print Accounting Date: 11/17/2017
 Template ID: Accounting Template: STANDARD

OK Cancel Refresh

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.

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

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving



Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		test item	2.0000	EA	05000	50,000.00000	100,000.00	Approved

View Printable Version View Approvals Close Short All Lines *Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

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.
- Default** – Select for single line distribution defaults
 - 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.
- 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**  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.

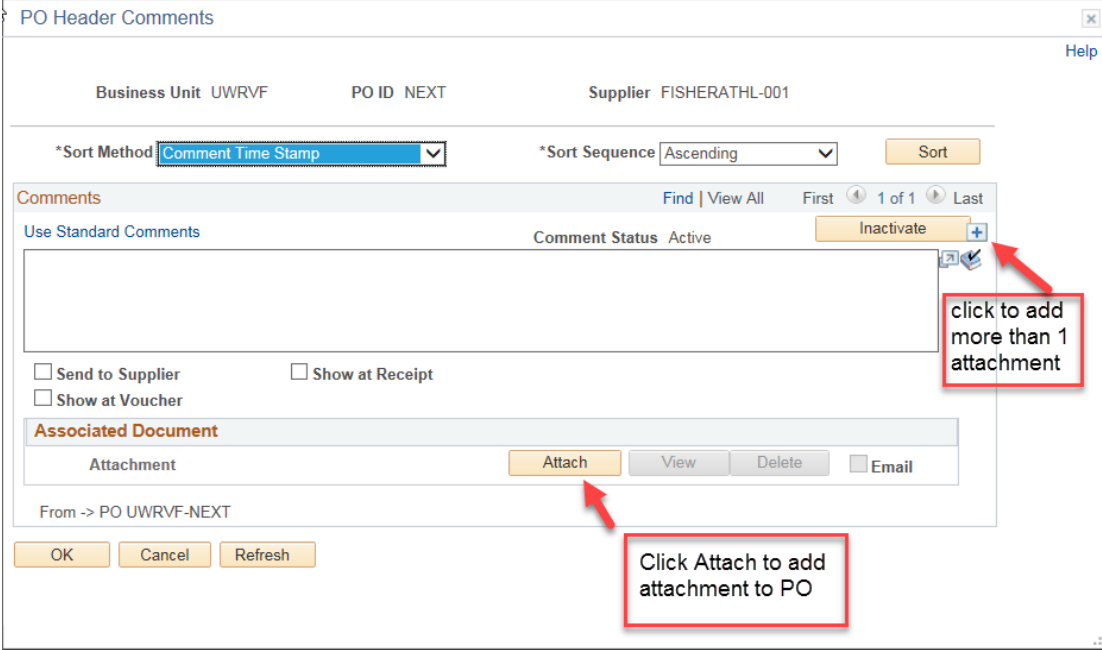
78. In the Comments section, **Select** *Ship To* from the drop down menu. **Note:** You cannot copy a comment without a *Ship To* location.

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

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



The screenshot shows the 'PO Header Comments' window. At the top, it displays 'Business Unit UWRVF', 'PO ID NEXT', and 'Supplier FISHERATHL-001'. Below this, there are dropdown menus for '*Sort Method' (set to 'Comment Time Stamp') and '*Sort Sequence' (set to 'Ascending'), with a 'Sort' button. The 'Comments' section includes a search bar, 'Find | View All', 'First 1 of 1 Last', and an 'Inactivate' button with a plus sign. A red box highlights the plus sign with the text 'click to add more than 1 attachment'. Below the comments section are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section contains an 'Attachment' field, an 'Attach' button (highlighted with a red box and the text 'Click Attach to add attachment to PO'), 'View', 'Delete', and 'Email' buttons. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons.

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

PO Header Comments

Business Unit UWRVF PO ID NEXT Supplier FISHERATHL-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View 1 First 1-2 of 2 Last

Use Standard Comments Comment Status Active Inactivate

Please see included terms and conditions.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment acct_3781_and_3780_activity_11-29-2017.xlsx Attach View Delete Email

From -> PO UWRVF-NEXT

Use Standard Comments Comment Status Active Inactivate

testing adding comments

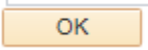
Send to Supplier Show at Receipt
 Show at Voucher

Associated Document


Attachment test_dispatch.docx Attach View Delete Email

From -> PO UWRVF-NEXT

OK Cancel Refresh


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

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

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. Make sure the net PO amount is a positive number.

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.

Express Purchase Order

Purchase Order

Business Unit UWLAC PO ID NEXT PO Status Open Budget Status Not Chk'd

Copy From [] Hold From Further Processing

▼ Header

*PO Date 04/10/2018 Supplier Search Doc Tol Status Valid
 *Supplier AMERICANFO-001 Supplier Details
 *Supplier ID 0001003173 AMERICAN FOODS GROUP LLC
 *Buyer 00798498 KING, AMANDA Receipt Status Not Recvd
 *Dispatch Method Print Dispatch

PO Reference []

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Actions

Amount Summary


Merchandise	40,000.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	40,000.00	USD

Add Items From

Catalog Purchasing Kit Item Search

Click icon to make PO Amount Only

Lines

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		FOOD AND BEVERAGES	8.0000	EA	00556	40,000.00	Approved

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by
1	04/10/2018	MURPHY	8.0000	5,000.00000	40,000.00	Active	Quantity

Distributions

Dist	Status	Percent	PO Qty	Merchandise Amt	Curr	*GL Unit	*Account	Fund	Dept	Program	Class
1	Open	100.0000	8.0000	40,000.00	USD	UWLAC	3100	128	025283	2	

Expand All Collapse All View Printable Version Go to ... More ...

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

Details for Line 1

236 characters remaining
 Preferred Language Item Description

Expand All Collapse All

Item Information

Supplier's Catalog
 Supplier Item ID
 Manufacturer ID
 Description
 Manufacturer's Item ID
 GTIN
 Replenish Code Standard

Device Tracking
 Withholding
 Withholding Code

Attributes

Physical Nature Goods
 *Price Qty Schedule Quantity
 *Price Date Due
 Amount Only

RFQ

RFQ ID

Contract

Contract SetID SHARE
 Contract ID
 Contract Version
 Contract Line
 Category Line Number
 Group ID
 Contract Details
 Milestone Line
 Release NEXT
 Rebate ID

GPO Contract
 GPO ID
 GPO Contract

Receiving

*Receiving Required Do Not
 Inspection Required
 Inspect ID
 Close Short

OK Cancel Refresh

Expand All
 Check Off Amount Only in the Attributes section
 Click OK


91. You will get the below message box.

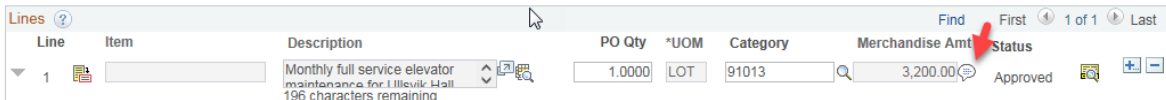
Message

The PO Qty will be 1 for an amount only line, the system will recalculate the merchandise amount (10200,273)

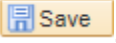
The PO Quantity will be 1 for an amount only line, the system will recalculate the merchandise amount, Continue?

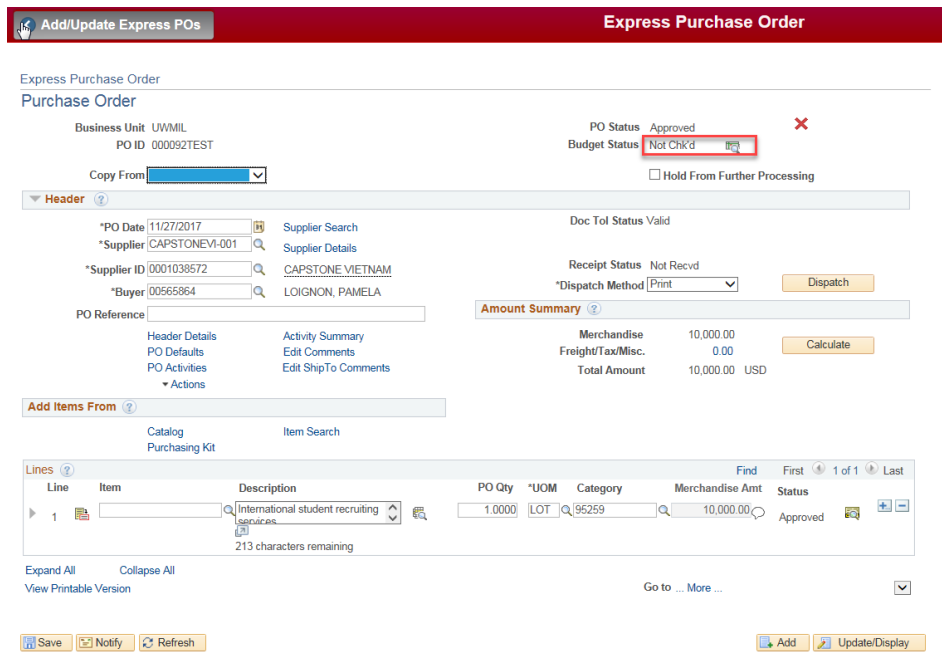
Yes No Cancel

- 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.



Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		Monthly full service elevator maintenance for Illievik Hall. 196 characters remaining	1.0000	LOT	91013	3,200.00	Approved

- 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** . 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.



Express Purchase Order

Express Purchase Order
Purchase Order

Business Unit UWML
PO ID 000092TEST

PO Status Approved
Budget Status Not Chk'd

Copy From [Dropdown]

Hold From Further Processing

Header

*PO Date 11/27/2017
*Supplier CAPSTONEVI-001
*Supplier ID 0001038572
*Buyer 00565864

Supplier Search
Supplier Details
CAPSTONE VIETNAM
LOIGNON, PAMELA

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Print

Amount Summary

Merchandise	10,000.00
Freight/Tax/Misc.	0.00
Total Amount	10,000.00 USD

Add Items From

Catalog
Purchasing Kit

Lines

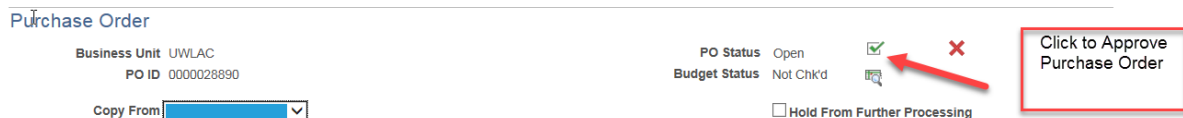
Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		International student recruiting services 213 characters remaining	1.0000	LOT	95259	10,000.00	Approved

Expand All Collapse All
View Printable Version

Go to ... More ...

Save Notify Refresh Add Update/Display

- 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.



Purchase Order

Business Unit UWLAC
PO ID 0000028890



Copy From [Dropdown]

PO Status Open
Budget Status Not Chk'd

Hold From Further Processing

Click to Approve Purchase Order

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

- 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.

< Add/Update Express POs
Express Purchase Order

Express Purchase Order

Purchase Order

Business Unit UWMIL
 PO ID 000092TEST
 Copy From

PO Status Approved ✗
Budget Status Valid
 Hold From Further Processing

Header

*PO Date 11/27/2017 [Supplier Search](#)
 *Supplier CAPSTONEVI-001 [Supplier Details](#)
 *Supplier ID 0001038572 CAPSTONE VIETNAM
 *Buyer 00565864 LOIGNON, PAMELA
 PO Reference

Doc Tot Status Valid

Receipt Status Not Recvd
 *Dispatch Method

Amount Summary

Merchandise	10,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	10,000.00	USD
Encumbrance Balance	10,000.00	USD

Add Items From

Catalog Item Search
 Purchasing Kit

Select Lines To Display

Search for Lines
 Line To

Lines

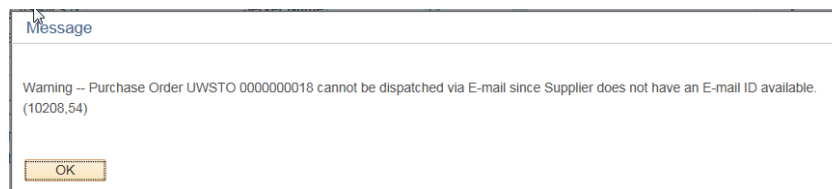
Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	<input type="text"/>	International student recruiting services	1.0000	LOT	95259	10,000.00	Approved

213 characters remaining

Expand All Collapse All
 View Printable Version Go to ... More ...

2. Select a Dispatch Method and Click **Dispatch**
 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:

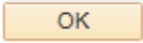
Test Dispatch - Selecting the *Test Dispatch* checkbox will make the PO Dispatch report show *Unauthorized* in the signature area, but still send the PO to the Supplier/Buyer if email dispatch is selected.

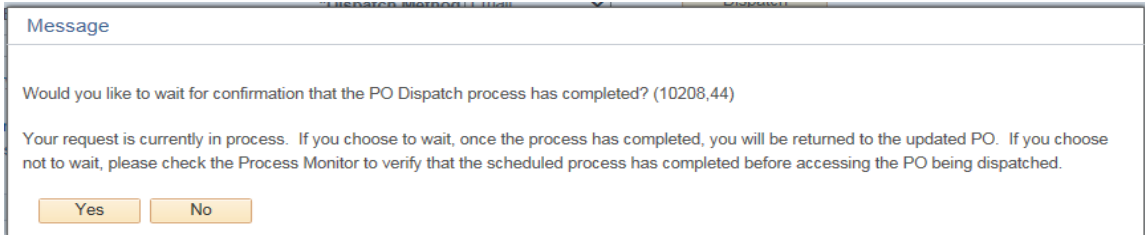
PO Status will stay *Approved*.

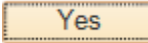

Print BU Comments - Does not impact the PO Dispatch report at UW.

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.

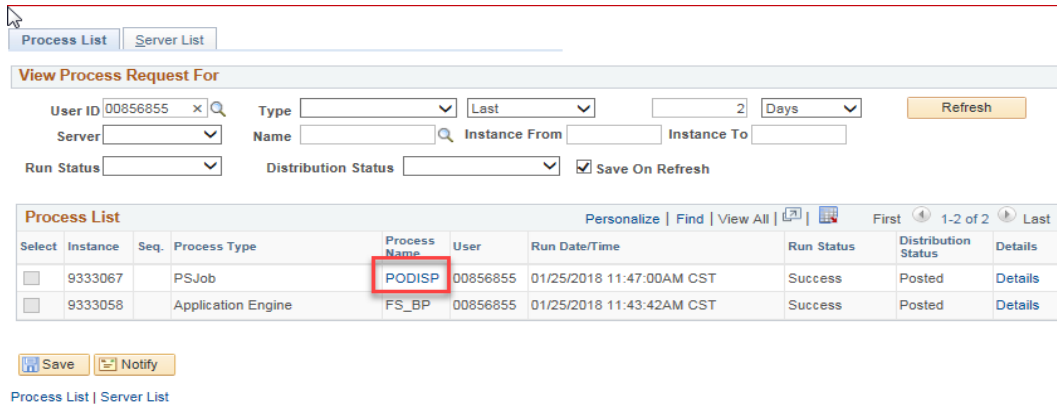
5. Click  to continue and you will receive the following message.



6. If you would like to wait while the PO Dispatches Click  or  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

Process Detail Help

Process Name PODISP Refresh

Main Job Instance 9333067

Left | Right

- 9333067 - PODISP Success
- 9333068 - POPO005 Success**
- 9333069 - PO_PO_EMAIL Success

Return

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

Process Detail Help

Process

Instance 9333068	Type SQR Process
Name POPO005	Description Single PO Dispatch/Print
Run Status Success	Distribution Status Posted

Run **Update Process**

Run Control ID PS_PO_UWPLTUPGRADE1_2867923	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSUNX	<input type="radio"/> Cancel Request
Recurrence	<input type="radio"/> Delete Request
	<input type="radio"/> Re-send Content
	<input type="radio"/> Restart Request

Date/Time **Actions**

Request Created On 01/25/2018 11:47:01AM CST	Parameters	Transfer
Run Anytime After 01/25/2018 11:47:00AM CST	Message Log	
Began Process At 01/25/2018 11:47:18AM CST	Batch Timings	
Ended Process At 01/25/2018 11:47:29AM CST	View Log/Trace	

OK Cancel

View Log/Trace x

Help

Report

Report ID 7139344 Process Instance 9333068 [Message Log](#)

Name POPO005 Process Type SQR Process

Run Status Success

Single PO Dispatch/Print

Distribution Details

Distribution Node SFPDEV_RPTNOD Expiration Date 04/25/2018

File List

Name	File Size (bytes)	Datetime Created
PO_UWPLT_UPGRADE1_Buyer.pdf	5,257	01/25/2018 11:47:29.289715AM CST
PO_UWPLT_UPGRADE1_Supplier.pdf	1,801,693	01/25/2018 11:47:29.289715AM CST
SQR_POPO005_9333068.log	1,692	01/25/2018 11:47:29.289715AM CST
popo005_9333068.out	1,976	01/25/2018 11:47:29.289715AM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00856855

[Return](#)

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

Buyer WorkCenter

Buyer WorkCenter Administration Archives

View Reports For
 User ID 00856855 Type Last 5 Days Refresh

Status Folder Instance to

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	7139345	9333069	Email	01/25/2018 11:47:01AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	7139344	9333068	Single PO Dispatch/Print	01/25/2018 11:47:01AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	7139336	9333058	Comm. Contrl. Budget Processor	01/25/2018 11:43:42AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	7138896	9332587	Email	01/23/2018 11:11:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	7138897	9332586	Single PO Dispatch/Print	01/23/2018 11:11:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	7138818	9332503	PO_DISPATCH - PO_DISPATCH.pdf	01/22/2018 4:13:50PM	Acrobat (*.pdf)	Posted	Details

Select All Deselect All

[Delete](#) Click the delete button to delete the selected report(s)

[Save](#)

List | Explorer | Administration | Archives

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

Report Detail x

[Help](#)

Report

Report ID 7139344 Process Instance 9333068 [Message Log](#)
 Name POPO005 Process Type SQR Process
 Run Status Success

Single PO Dispatch/Print

Distribution Details

Distribution Node SFSRDEV_RPTNOD Expiration Date 04/25/2018 B1

File List

Name	File Size (bytes)	Datetime Created
PO_UWPLT_UPGRADE1_Buyer.pdf	5,257	01/25/2018 11:47:29.289715AM CST
PO_UWPLT_UPGRADE1_Supplier.pdf	1,801,693	01/25/2018 11:47:29.289715AM CST
SQR_POPO005_9333068.log	1,692	01/25/2018 11:47:29.289715AM CST
popo005_9333068.out	1,976	01/25/2018 11:47:29.289715AM CST

Distribute To

Distribution ID Type *Distribution ID

User 0085685



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 Batch Process

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.

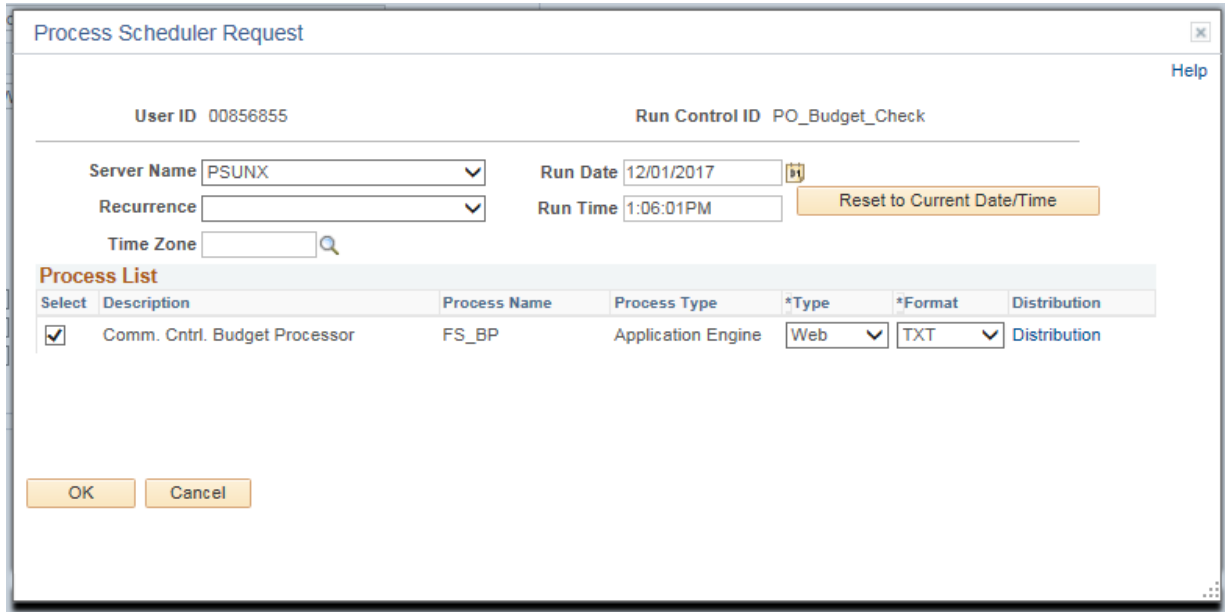
Navigation: *Purchasing > Purchase Orders > Budget Check*

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**



Process Scheduler Request

User ID 00856855 Run Control ID PO_Budget_Check

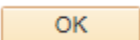
Server Name PSUNX Run Date 12/01/2017
 Recurrence Recurrence Run Time 1:06:01PM
 Time Zone Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Comm. Cntrl. Budget Processor	FS_BP	Application Engine	Web	TXT	Distribution

OK Cancel

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

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

Budget Check

Run Control ID PO_Budget_Check Report Manager Process Monitor **Run**

Process Instance:9324846

Budget Check Request Find | View All First 1 of 1 Last

Process Frequency
 Once Always Don't Run

Request Number 1 *Description Budget Check

Process Options

*Business Unit Value Business Unit UWPLT

PO ID All
 PO Date All
 Actg Date All
 PO Type All
 Buyer ID All
 Origin All
 PO Status Some

Approved Dispatched Open
 Complete Initial Denied
 Canceled Pending Approval Pending Cancel

Mid Roll Status All

11. Click Process Monitor.

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

< Budget Check Request **PO Budget Check Request**

Process List Server List

View Process Request For

User ID 00856855 x Type Last 2 Days **Refresh**

Server Name Instance From 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"/>	9324846		Application Engine	FS_BP	00856855	12/01/2017 1:06:01PM CST	Success	Posted	Details

Go back to PO Budget Check Request

Save Notify

Process List | Server List

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 [Find an Existing Value](#), select the Run Control ID, and skip to step 19. Otherwise go to the next step.

17. To add a New Run Control **Click** [Add a New Value](#)

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

Process List Dispatch Purchase Orders

Dispatch Purchase Orders

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

19. Click 

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 

Process Scheduler Request

User ID 00856855 Run Control ID PO_Dispatch

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

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

24. Select Server Name 'PSUNX'

25. Check the box for PO Dispatch & Email job

26. Click

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

Process List Dispatch Purchase Orders

Dispatch POs

Run Control ID PO_Dispatch Language English Specified Language Recipient's Language

Process Instance: 9324849

Process Request Parameters

Business Unit To

PO ID

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Fax Cover Page

Template ID

Statuses to Include

Approved Dispatched Pending Cancel

Dispatch Methods to Include

Print FAX EDX

E-Mail Phone

Miscellaneous Options

*Chartfields

Change Orders

Print Changes Only Print BU Comments

Test Dispatch Print PO Item Description

Print Copy Print Duplicate

Sort By

Administration

View Reports For
 User ID: 00856855 Type: Last 1 Days Refresh
 Status: Folder: Instance: to:

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	7122617	9324851	Email	12/01/2017 1:48:49PM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	7122616	9324850	Single PO Dispatch/Print	12/01/2017 1:48:49PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	7122613	9324846	Comm. Cntrl. Budget Processor	12/01/2017 1:08:20PM	Text Files (*.txt)	Posted	Details

Select All Deselect All
 Delete Click the delete button to delete the selected report(s)
 Go back to Dispatch Purchase Orders
 Save
 List | Explorer | Administration | Archives

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

Report Detail

Report

Report ID 7139344 Process Instance 9333068 Message Log
 Name POPO005 Process Type SQR Process
 Run Status Success

Single PO Dispatch/Print

Distribution Details

Distribution Node SFPRDEV_RPTNOD Expiration Date 04/25/2018

File List

Name	File Size (bytes)	Datetime Created
PO_UWPLT_UPGRADE1_Buyer.pdf	5,257	01/25/2018 11:47:29.289715AM CST
PO_UWPLT_UPGRADE1_Supplier.pdf	1,801,693	01/25/2018 11:47:29.289715AM CST
SQR_POPO005_9333068.log	1,692	01/25/2018 11:47:29.289715AM CST
popo005_9333068.out	1,976	01/25/2018 11:47:29.289715AM CST

Distribute To

Distribution ID Type *Distribution ID
 User 00856855
 OK Cancel


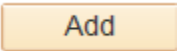
30. The Buyer and Supplier copies of the PO Dispatch report can be found in the *File List* section of the *Report Details* page.

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 does not have matching, it cannot be changed to a matching purchase order.

- From the Express or Regular Entry page, Click the  tab and Click 
- The Purchase Order Entry Page will be displayed.

Express Purchase Order
 Purchase Order

Business Unit UWLAC
 PO ID NEXT
 Copy From

PO Status Initial
 Budget Status Not Chk'd
 Hold From Further Processing

Header

*PO Date 04/10/2018 Supplier Search
 *Supplier Supplier Details
 *Supplier ID
 *Buyer 00856855 MCDONALD, DENISE
 PO Reference

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

Amount Summary

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Add Items From

Catalog Purchasing Kit
 Item Search

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1						0.000	Approved

Expand All Collapse All
 View Printable Version
 Go to ... More ...

Save Notify Refresh Add Update/Display

- Click the Copy From drop down. It will display the documents available for copy. See the below.
 - Contract – currently not being used by UW Institutions
 - Requisition – only available for UW Institutions using eProcurement
 - A Supplier Name must be selected first before using the Copy From Requisition Option
 - Purchase Order – available to all UW Institutions

- Assuming Purchase Order was selected, the most common “Copy From” option, the below screen will appear.

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID PO Date

Supplier Status

Supplier ID Origin

Buyer Item ID

PO Reference Category

Search

Select PO

Select	PO ID	PO Date	PO Status	Supplier ID	Supplier
<input type="checkbox"/>					

OK Cancel Refresh

After entering desired criteria, Click Search. If you Click Search without entering Criteria, you search may time out.
Try to enter in at least 1 criteria

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

6. Click Search.

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID PO Date

Supplier **WBARTIST-001** Status

Supplier ID **0001000004** Origin

Buyer Item ID

PO Reference Category

Search

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

Details | More Details

Select	PO ID	PO Date	PO Status	Supplier ID	Supplier
<input checked="" type="checkbox"/>	0000028884	04/09/2018	Dispatched	0001000004	WBARTIST-001

OK **Cancel** **Refresh**

Select the PO by checking off the box under Select.
 Click OK to pull the selected PO into the Purchase Order

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.

Express Purchase Order

Purchase Order

Business Unit UWLAC PO ID NEXT PO Status Open Budget Status Not Chkd

Copy From Hold From Further Processing

Header

*PO Date 04/10/2018 Supplier Search
 *Supplier WBARTIST-001 Supplier Details
 *Supplier ID 0001000004 WB ARTIST
 *Buyer 00856855 MCDONALD, DENISE

PO Reference Doc Tot Status Valid

Receipt Status Not Recvd
 *Dispatch Method Email Dispatch

Amount Summary

Merchandise 0.00
 Freight/Tax/Misc. 0.00 Calculate
 Total Amount 0.00 USD

Add Items From Catalog Item Search Purchasing Kit

Line	Item	Description	PO Qty	UOM	Category	Merchandise Amt	Status
1		ARTIST MATERIALS 238 characters remaining	2.0000	EA	00584	0.00	Approved

Expand All Collapse All View Printable Version Go to ... More ...

Save Notify Refresh Add Update/Display

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