Dispatch Purchase Orders by Batch

Quick Tip: Dispatch Purchase Order by Batch

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

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

Navigation:

Purchasing>Purchase Orders>Reconcile Pos>Reconciliation Workbench

<table>
<thead>
<tr>
<th>Reconciliation WorkBench</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter any information you have and click Search. Leave fields blank for a list of all values.</td>
</tr>
</tbody>
</table>

Find an Existing Value  Add a New Value

- **Business Unit:**
  - [Select]
  - 58000

- **WorkBench ID:**
  - Begins with

- **Description:**
  - Begins with

- Case Sensitive

**Search**  **Clear**  **Basic Search**  **Save Search Criteria**

Find an Existing Value  Add a New Value

Input the Workbench ID and click the **Search** button.
Input your Buyer ID and click the Approved Radio box located in the Status section.
Dispatch Purchase Orders by Batch

Click the button.

Click the link to review all eligible Purchase Orders.

Click the link to review all eligible Purchase Orders.
Dispatch Purchase Orders by Batch

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

Click the tab.

The Budget Status must equal Valid or you need to deselect the Purchase Order.

- You can go to the Maintain Purchase Order by clicking the icon located to the far right of the Purchase Order number.

When you are ready to dispatch the Purchase Order click the button at the bottom of the page.
Dispatch Purchase Orders by Batch

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

- **Not Qualified**
  - You can identify the reason the Purchase Order is not qualified to be dispatched by clicking the icon located to the right of the Purchase Order not qualified.

- **Qualified**
  - Identifies the Purchase Orders that are qualified to be dispatched.
  - Click the button to the right of the Purchase Order if you do not want to dispatch it.
  - Be sure to click the link to review all Purchase Orders Qualified to be dispatched.

When ready click the button to continue with dispatching the Purchase Order.
Dispatch Purchase Orders by Batch

Continue to Dispatch POs. (10224,41)

[Yes] [No]

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

Reconciliation WorkBench
Business Unit: S8888   WorkBench ID: DISPATCHPO
Description: DISPATCH PURCHASE ORDERS

Selected POs for Further Processing

<table>
<thead>
<tr>
<th>Purchase Order</th>
<th>Doc Status</th>
<th>PO Status</th>
<th>Hold</th>
<th>PO Date</th>
<th>Last Activity</th>
<th>Vendor ID</th>
<th>Buyer</th>
<th>Match Action</th>
<th>Change Order</th>
<th>Blanket PO</th>
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</table>

Select All  [Clear All]
Action: Approve Unapprove Cancel Close Dispatch Previous
Dispatch Purchase Orders by Batch

Print Purchase Orders Dispatched

Navigation:

People Tools>Process Schedule>Process Monitor

Click on the PODISP link.
Dispatch Purchase Orders by Batch

<table>
<thead>
<tr>
<th>Process Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Name:</td>
</tr>
<tr>
<td>Main Job Instance:</td>
</tr>
<tr>
<td>Left</td>
</tr>
</tbody>
</table>

- 3728821 - PODISP Success
- 3728822 - POPO0005 Success
- 3728823 - PO PO EMAIL Success

Click on the middle link.
## Dispatch Purchase Orders by Batch

### Process Detail

<table>
<thead>
<tr>
<th>Process</th>
<th>Type: SQR Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance: 3728622</td>
<td>Name: POPC005</td>
</tr>
<tr>
<td>Run Status: Success</td>
<td>Distribution Status: Posted</td>
</tr>
</tbody>
</table>

### Run

- **Run Control ID**: RMAXWELL
- **Location**: Server
- **Server**: 
- **Recurrence**: 

### Date/Time

- **Request Created On**: 12/04/2006 10:47:33AM CST
- **Run Anytime After**: 12/04/2006 10:47:30AM CST
- **Began Process At**: 12/04/2006 10:47:51AM CST
- **Ended Process At**: 12/04/2006 10:48:28AM CST

### Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

### Actions

- Parameters
- Transfer
- Message Log
- Batch Timings
- View Log/Trace

### Click on the View Log/Trace link.
Click on the PDF link. This link will show all the purchase orders that have been selected to dispatch.