

## 9.2 Batch Dispatch Purchase Orders

**Purpose:** Batch dispatch purchase orders in ctcLink.

**Audience:** Finance staff.

❗ You must have at least one of these local college managed security roles:

- ZZ Purchase Order Processing

You must also set these User Preference Definitions:

- [User Preferences: Purchase Order Entry](#)
- [Buyer Setup](#)

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

Use the Dispatch POs page to run the PO Dispatch/Print process and dispatch purchase orders, run the Email process, or run the PO Dispatch & Email multi-process job.

### Batch Dispatch Purchase Orders

**Navigation:** NavBar > Navigator > Purchasing > Purchase Orders > Dispatch POs

1. The Dispatch POs search page will display. On the search page, enter a new or existing **Run Control ID**.
2. Select the **ADD** or **Search** button. The Dispatch POs page will display.

**Dispatch Purchase Orders**

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

Find an Existing Value | Add a New Value

▼ Search Criteria

Run Control ID begins with

☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

3. From the Dispatch POs page, enter the **Business Unit**.
4. Enter the **PO ID**.
5. Use the **Dispatch Methods to Include** group box to select which dispatch methods to include in this run of the process. Selected values are only used as a part of the data selection criteria. To change the method by which the purchase order is to be dispatched, you must modify the dispatch method on the **Maintain Purchase Order - Purchase Order** page.
6. From the Miscellaneous Options group box, select the applicable **Chartfields** value from the drop-down menu:
  - Select **Recycled and Valid Chartfields** to process purchase orders regardless of whether the Chartfields are valid or recycled.
  - Select **Recycled Chartfields** to process only purchase orders with distribution lines whose Chartfields are identified as Recycled. (PO\_LINE\_DISTRIB.CHARTFIELD\_STATUS = 'R').
  - Select **Valid Chartfields** to process only purchase orders with distribution lines whose Chartfields are identified as Valid. (PO\_LINE\_DISTRIB.CHARTFIELD\_STATUS = 'V').

Dispatch POs

Run Control ID: DISPO  
Language: English

Report Manager Process Monitor Run

Specified Language Recipient's Language

**Process Request Parameters**

Business Unit

To

PO ID  [Select Purchase Order](#)

Contract SetID

Contract ID

Release

From Date  31

Through Date  31

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  
Recycled AND Valid Chartfields  
Recycled Chartfields  
Valid Chartfields

Change Orders Changed and UnChanged Orders

☐ Print Changes Only ☐ Print BU Comments  
☐ Test Dispatch ☒ Print PO Item Description  
☐ Print Copy ☐ Print Duplicate  
☐ Exclude POs tied to Authored Contract Documents

Sort By Sort by Line Number

Save Notify Add Update/Display

7. From the Miscellaneous Options group box, select the **Change Orders** value from the drop-down menu:
  - Select **Changed Orders** to process only purchase orders that have been changed.
  - Select **Changed and UnChanged Orders** to process changed and unchanged purchase orders.
  - Select **UnChanged Orders** to process only purchase orders that have never been changed.
8. If you select to dispatch changed orders in the **Change Orders** field, the **Print Changes Only** option becomes available. Select to dispatch only the changes to the purchase order, rather than the entire purchase order.
9. If you create the purchase order from a contract with the **Release To Single PO Only** option selected, select this option to have the system send only the latest changes to the supplier.

Dispatch POs

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

**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 Valid Chartfields Change Orders Changed and UnChanged Orders Changed Orders UnChanged Orders

Print Changes Only Test Dispatch Print PO Item Description Print Copy Print Duplicate Exclude POs tied to Authored Contract Documents Sort By Sort by Line Number

Save Notify Add Update/Display

10. Select the **Print PO Item Description** option to print the item description from the **Maintain Purchase Order - Purchase Order** page, instead of from the **Purchasing Attributes** page. The item description stored on the purchase order is in the base language and may have been modified on the purchase order.
11. Keep all other fields as defaulted.
12. Select the **Run** button. The Process Scheduler Request page will display.

Dispatch POs

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

**Process Request Parameters**

Business Unit WA170 To PO ID PO Status Complete 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 Valid Chartfields Change Orders Changed Orders

Print Changes Only Print BU Comments Test Dispatch Print PO Item Description Print Copy Print Duplicate Exclude POs tied to Authored Contract Documents Sort By Sort by Line Number

Save Notify Add Update/Display

13. On the Process Scheduler Request page, select the check box next to the **PO BI Publisher Dispatch** description.

14. Select the **OK** button. The Dispatch POs page will display.

**Process Scheduler Request**

User ID: CTC\_JMERRILL Run Control ID: DISPO

Server Name: [dropdown] Run Date: 02/13/2019 [calendar icon]  
Recurrence: [dropdown] Run Time: 6:35:47AM [button: Reset to Current Date/Time]  
Time Zone: [dropdown]

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO BI Publisher Dispatch	POXMLP	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Web	TEXT	Distribution

[button: OK] [button: Cancel]

15. From the Dispatch POs page, make note of the **Process Instance** number.

16. Select the **Process Monitor** link. The Process List page will display.

**Dispatch POs**

Run Control ID: DISPO Language: English [dropdown] [radio: Specified Language] [radio: Recipient's Language] [button: Run]  
[button: Report Manager] [button: Process Monitor] [text: Process Instance: 464700]

**Process Request Parameters**

Business Unit: WA170 [search icon]  
To: [search icon]  
PO ID: [search icon] [button: Select Purchase Order]  
Contract SetID: [search icon]  
Contract ID: [search icon]  
Release: [search icon]  
From Date: [calendar icon]  
Through Date: [calendar icon]  
Supplier ID: [search icon]  
Buyer: [search icon]  
Fax Cover Page: [search icon]  
Template ID: [search icon]

**Statuses to Include**

☒ Approved ☒ Dispatched ☒ Pending Cancel

**Dispatch Methods to Include**

☒ Print ☒ FAX ☒ EDX  
☒ E-Mail ☒ Phone

**Miscellaneous Options**

\*Chartfields: Valid Chartfields [dropdown]  
Change Orders: Changed Orders [dropdown]  
☒ Print Changes Only ☐ Print BU Comments  
☐ Test Dispatch ☒ Print PO Item Description  
☐ Print Copy ☐ Print Duplicate  
☐ Exclude POs tied to Authored Contract Documents  
Sort By: Sort by Line Number [dropdown]

[button: Save] [button: Notify] [button: Add] [button: Update/Display]

17. On the Process List tab, select the **Refresh** button until the **Run Status** = Success and the **Distribution Status** = Posted.

Process List

Server List

View Process Request For

User ID

CTC\_JMERRILL

Type

Last

1

Days

Refresh

Server

Name

Instance From

Instance To

Run Status

Distribution Status

☒ Save On Refresh

Process List

Personalize

Find

View All

First

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Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	464700		PSJob	POXMLP	CTC_JMERRILL	02/13/2019 6:35:47AM PST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	464694		Application Engine	PV_FS_BP	CTC_JMERRILL	02/12/2019 12:38:58PM PST	No Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	464693		Application Engine	PV_FS_BP	CTC_JMERRILL	02/12/2019 12:35:58PM PST	No Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	464692		Application Engine	PV_FS_BP	CTC_JMERRILL	02/12/2019 12:24:20PM PST	Success	Posted	<a href="#">Details</a>

Go back to Dispatch Purchase Orders

Save

Notify

Process List

Server List

18. The process to select the parameters to determine which purchase orders are included in the batch is now complete.
19. End of procedure.

9.2 Batch Dispatch Purchase Orders

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