



PeopleSoft eProcurement Implementation Project



Sourcing Requisitions To Purchase Orders

PeopleSoft Version: 9.1 Financials/Supply Chain
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TABLE OF CONTENTS

Revision Control.....	3
Budget Check	4
Expedite Requisition.....	6
PO Updates	13
PO Email Dispatch.....	16
PO Email Dispatch with Attachments	19



Revision Control

VERSION	DATE	NAME	COMMENTS
1.0	6/22/2016	Aaron Dise	Initial Release
1.1	12/19/2016	Aaron Dise	UWSYS Updates
1.2	1/26/2017	Aaron Dise	Budget Check Updates
1.3	2/15/2017	Aaron Dise	PO Reference Field and Account Update
1.4	3/9/2017	Aaron Dise	Additional option for reqs stuck in processing
1.5	3/10/2017	Denise McDonald	Added comment on Matching Exceptions and PO Email dispatch options



Budget Check

The steps below describe the process of budget checking **Approved Requisitions** prior to Expediting/Sourcing to a Purchase Order.

If you need to approve the requisition, go to the eProcurement Approver Document on the SFS Documentation & Training Team Site.

Budget Checking Approved Requisitions

1. Follow the path below to the Manage Requisition page.

Main Menu > eProcurement > Manage Requisitions

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

Search Clear

The Requester specified has no Requisitions.

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

2. From the Manage Requisition Page select the Requisition Status of Approved and the appropriate Business Unit and Dates. Click Search.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000016	TESTCONFIG5	UWSYS	01/24/2017	Approved	Not Chk'd	600.00 USD	<Select Action> Go
0000000013	TESTCONFIG2	UWADM	01/23/2017	Approved	Not Chk'd	80.00 USD	<Select Action> Go
0000000012	TESTCONFIG1	UWADM	01/23/2017	Approved	Not Chk'd	300.00 USD	<Select Action> Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

3. Find the Requisition to Budget Check. Use the <Select Action> drop down menu to the right, and select "Check Budget."

Click Go.



4. The Approved Requisition is now Valid and available for Expedite/Sourcing. See the below.

Manage Requisitions

Search Requisitions
To locate requisitions, edit the criteria below and click the Search button.
Business Unit: Requisition Name:
Requisition ID: Request Status: Budget Status:
Date From: Date To:
Requester: Entered By: PO ID:

Requisitions
To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000016	TESTCONFIG5	UWSYS	01/24/2017	Approved	Valid	600.00 USD	<Select Action> <input type="button" value="Go"/>
0000000013	TESTCONFIG2	UWADM	01/23/2017	Approved	Not Chk'd	80.00 USD	<Select Action> <input type="button" value="Go"/>
0000000012	TESTCONFIG1	UWADM	01/23/2017	Approved	Not Chk'd	300.00 USD	<Select Action> <input type="button" value="Go"/>



Expedite Requisition

The steps below describe the business process of converting a Requisition to a Purchase Order.

1. Follow the path below to the Expedite Requisitions page.

Main Menu > eProcurement > Buyer Center > Expedite Requisitions

Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit: UWSYS

Requisition ID:

Requisition Name:

Requester:

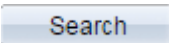
Buyer:

Category:

Vendor Name:

☒ Include Lines With No Vendor

Search Clear

2. Enter your Business Unit and click  to view all available requisitions for sourcing.

Expedite Requisitions

Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit: UWSYS

Requisition ID:

Requisition Name:

Requester:

Buyer:

Category:

Vendor Name:

☒ Include Lines With No Vendor

Search Clear

Requisition Schedule Lines

Include	Requisition ID	Line	Sched	Item Description	Select	Vendor Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
<input type="checkbox"/>	0000000014	1	1	Management fees	<input type="checkbox"/>	MANAGINGDI-001	000001	1.0000	EA	50000.00	USD	N

☐ Include All/Exclude All

☐ Select All/Deselect All

Apply Vendor to Selected Lines

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID: 00848539

☒ Build POs as Approved

Submit Preview

3. Verify the Vendor Name field is populated. The requisition cannot be sourced without a Vendor.
4. Verify the Default Buyer ID field is populated. If an update is needed, please make it at this time. This will be the Buyer ID you want on the Purchase Order.



5. Click ☒ on the include All/Exclude All the lines you wish to expedite to a PO.

Requisition Schedule Lines

Include	Requisition ID	Line	Sched	Item Description	Select
<input checked="" type="checkbox"/>	0000000013	1	1	PENCILS	<input type="checkbox"/>

☒ [Include All/Exclude All](#)

6. Click ☒ to build the PO as Approved.

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID: ☒ Build POs as Approved

7. Click Those lines are currently in process of becoming a purchase order.

8. Go to the bottom of the page, and Click [Go to Process Monitor](#)

Process List

View Process Request For

User ID Type Last Days

Server Name 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"/>	8833332		Application Engine	PV_PO_CREATE	adise	12/17/2016 7:12:03PM CST	Processing	N/A	Details

9. Click Refresh until the Run Status equals Success. Once the process has run to Success. Click [Go back to Expedite Requisitions](#) to Expedite other requisitions as needed. If no others to expedite, go to the next step.

Process List

View Process Request For

User ID Type Last Days

Server Name 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"/>	8833332		Application Engine	PV_PO_CREATE	adise	12/17/2016 7:12:03PM CST	Success	Posted	Details

[Go back to Expedite Requisitions](#)



10. Verify the requisition has become a Purchase Order.

Main Menu > eProcurement > Buyer Center > Procurement Processes > Sourcing Workbench

Sourcing Workbench

Sourcing

Search Criteria

Process Instance:	<input type="text"/>	System Source:	<input type="text"/>
Business Unit:	<input type="text"/>	PO Stage Type:	<input type="text"/>
Requisition ID:	<input type="text"/>	PO Stage ID:	<input type="text"/>
Requisition Name:	<input type="text"/>	Stage Status:	<input type="text"/>
Buyer:	<input type="text"/>	Item ID:	<input type="text"/>
Contract SetID:	<input type="text"/>	Line Number:	<input type="text"/>
Contract ID:	<input type="text"/>	Schedule Number:	<input type="text"/>

☒ Select All ☐ UnSelect All

11. Enter, at minimum, the below:

- Business Unit
- Buyer Empl ID
- Other search criteria can be entered to limit the number of results

12. Click . If the PO was created, the *Stg Status should say Completed.

Search Results											Personalize Find View All [Icons] First 1-4 of 4 Last			
Selected Items		Stage Info		Error Messages		[Icon]								
Sel	Instance		*Stg Status	Unit	Buyer	Vendor ID	Loc	Item ID	Description	Requisition ID	Purchase Order			
<input type="checkbox"/>	8850676		Completed	UWADM	JONES, JESSICA	0000000562	000001	Item	Consulting Services	0000000009	0000000004			
<input type="checkbox"/>	8849422		Completed	UWADM	Auditor, EXAUD60	0000000350	000001	Item	DRAWER DIVIDERS	0000000010	0000000002			
<input type="checkbox"/>	8849422		Completed	UWADM	Auditor, EXAUD60	0000002800	000001	Item	Computer Desk	0000000010	0000000003			
<input type="checkbox"/>	8847524		Completed	UWADM	JONES, JESSICA	0000002811	000001	Item	Consulting Service	0000000011	0000000001			

13. Completed POs are now available for dispatch. The new Purchase Order ID is listed to the right of the Requisition ID.

14. Click the blue hyperlink under Purchase Order, to view the PO details.



15. You will be taken directly to the created PO.


16. If no issues with the creation of the PO, go to the PO Updates section, listed further down.

17. If errors were encountered, proceed to the next steps, where you can try expediting again (step 18) or creating the PO by copying the requisition (step 22).

18. In most cases the Stage Status will be complete and you'll see the PO ID. However, in some cases if the process didn't complete or the line(s) were in error, you will need to follow the steps listed below.






19. Change the *Stg Status to 'Reset Req and Purge', Click 

Search Results										
Personalize Find View All First 1-5 of 5 Last										
Selected Items Stage Info Error Messages										
Sel	Instance	*Stg Status	Unit	Buyer	Vendor ID	Loc	Item ID	Description	Requisition ID	Purchase Order
<input type="checkbox"/>	8850677	 Reset Req and Purge	UWADM	JONES, JESSICA	0000002811	00001	Item	Computer Desk	0000000005	UNASSIGNED

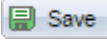
20. Follow the same Expedite Steps above to source this requisition to a Purchase Order.


Main Menu > eProcurement > Buyer Center > Expedite Requisitions

21. POs should have been created and are now available for dispatch. Click the blue hyperlink associated to the PO to view the PO details and proceed to the PO Updates section of this document, listed further down.

Search Results										
Personalize Find View All First 1-4 of 4 Last										
Selected Items Stage Info Error Messages										
Sel	Instance	*Stg Status	Unit	Buyer	Vendor ID	Loc	Item ID	Description	Requisition ID	Purchase Order
<input type="checkbox"/>	8850676	 Completed	UWADM	JONES, JESSICA	0000000562	000001	Item	Consulting Services	0000000009	0000000004
<input type="checkbox"/>	8849422	 Completed	UWADM	Auditor, EXAUD60	0000000350	000001	Item	DRAWER DIVIDERS	0000000010	0000000002
<input type="checkbox"/>	8849422	 Completed	UWADM	Auditor, EXAUD60	0000002800	000001	Item	Computer Desk	0000000010	0000000003
<input type="checkbox"/>	8847524	 Completed	UWADM	JONES, JESSICA	0000002811	000001	Item	Consulting Service	0000000011	0000000001

22. If there is still an issue with the requisition, follow the steps below to create the purchase order from the requisition using the copy function.

23. Change the Stage Status to 'Reset Req and Purge', Click . Proceed to the PO entry page.

Search Results										
Personalize Find View All First 1-5 of 5 Last										
Selected Items Stage Info Error Messages										
Sel	Instance	*Stg Status	Unit	Buyer	Vendor ID	Loc	Item ID	Description	Requisition ID	Purchase Order
<input type="checkbox"/>	8850677	 Reset Req and Purge	UWADM	JONES, JESSICA	0000002811	00001	Item	Computer Desk	0000000005	UNASSIGNED



24. Access the PO Entry page using the below path.

Main Menu > Purchasing > Purchase Orders > Add/Update POs

- Populate the Vendor and Vendor ID fields. This must be populated prior to the Requisition Copy.
- Select the Copy From drop down highlighted below and select Requisition.

Purchase Order

Business Unit: UWSYS Expiration Date: PO Status: Approved
PO ID: NEXT Budget Status: Not Chk'd

Copy From: ▼ Source Document: ☐ Hold From Further Processing

Header

*PO Date: 03/09/2017 Vendor Search
*Vendor: CDW-G-001 Vendor Details
*Vendor ID: 0000002811 CDW-G
*Buyer: 00848539 JONES, JESSICA

PO Reference: *PO Type: GEN **Amount Summary**
Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add Ship To Comments

Doc Tot Status: Valid

Receipt Status: Not Recvd
*Dispatch Method: Print Dispatch

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

Add Items From
Purchasing Kit Catalog Item Search

Lines

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

25. Enter the Requisition ID and click Search. Click [Select All](#) . Click

Copy To PO

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit: UWSYS Buyer:

Vendor ID: Origin:

Category: Max Rows: 20

Requisition ID: 0000000012 ☒ Include Reqs With No Vendor
Requisition Name: ☒ Include Inventory Items
Contract ID: ☐ Exclude Auto Source Item

Search

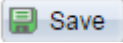
Select Requisition Lines





Select	*Vendor	PO Qty	PO UOM	Item	Description	Req ID	Line #	Procurement Card	Calc Price	Schedule Split
<input type="checkbox"/>	CDW-G-001	1.0000	EA		stuff	0000000012	1			N
<input type="checkbox"/>	CDW-G-001	1.0000	EA		good stuff	0000000012	2			N

☒ Select All ☐ Clear All

Copy To PO





26. Click  . The PO has been created. Proceed to the PO Updates section of this document.




Business Unit: UWSYS Expiration Date:  PO Status: Approved Budget Status: Not Chk'd   



Copy From: Source Document: ☐ Hold From Further Processing

Header

*PO Date: 03/09/2017  [Vendor Search](#) Doc Tot Status: Valid


*Vendor: CDW-G-001  [Vendor Details](#) Receipt Status: Not Recvd

*Vendor ID: 0000002811  CDW-G *Dispatch Method:  

*Buyer: 00848539  JONES, JESSICA *PO Type: GEN 

PO Reference: **Amount Summary**

[Header Details](#) [Activity Summary](#) Merchandise: 120.00



[PQ Defaults](#) [Add Comments](#) Freight/Tax/Misc.: 0.00 


[Requisitions](#) [Add Ship to Comments](#) Total Amount: 120.00 USD



















[PO Activities](#)

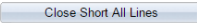

Add Items From






Purchasing Kit Catalog Item Search

Lines Personalize | Find | View All |   First 1-2 of 2 Last

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		<input type="text"/>  stuff 	1.0000	EA 	80000 	100.00000	100.00	Approved			 
2		<input type="text"/>  good stuff 	1.0000	EA 	16072 	20.00000	20.00	Approved			 

[View Printable Version](#)  *Go to: ... More ... 



PO Updates

The steps below describe the changes required from the Buyer once the Requisition is sourced to a Purchase Order.

1. Go to the Add/Update PO page.

Main Menu > Purchasing > Purchase Orders > Add/Update POs

When a PO is built from a requisition, the PO Reference gets populated with the Requisition ID. The UWSA Purchasing Group currently utilizes the PO Reference field for other purposes. You can remove the Requisition from the Reference field and populate with the desired information.

If required you can still view the Req ID via the Distribution for Schedule page, Req Detail tab shown below in the second screenshot.

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window ? Help Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit: UWSYS Expiration Date: PO Status: Approved
PO ID: 0000000001 Budget Status: Valid
Copy From: Source Document: ☐ Hold From Further Processing

Header

*PO Date: 02/06/2017 Vendor Search
*Vendor: MACWORLD-001 Vendor Details
*Vendor ID: 0000000004 MACWORLD
*Buyer: EXMRG74 Employee, EXMRG74
PO Reference: Online Src From Req 0000000016 *PO Type GEN
Header Details
PO Defaults
Requisitions
PO Activities

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

Amount Summary

Merchandise: 600.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 600.00 USD
Encumbrance Balance: 600.00 USD

Add Items From

Purchasing Kit Catalog Item Search

Select Lines To Display

Line: To: Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Computer Table	2.0000	EA	0000	300.00000	600.00	Approved

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window ? Help Personalize Page

Maintain Purchase Order

Distributions for Schedule 1

Unit: UWSYS Vendor: MACWORLD-001
PO ID: 0000000001 Item: Computer Table
Line: 1
Schedule: 1 Status: Active

*Distribute By: Quantity
SpeedChart: Multi-SpeedCharts

Schedule Qty: 2.0000
Merchandise Amount: 600.00 USD
Doc. Base Amount: 600.00 USD

Distribution

Chartfields	Details/Tax	Asset Information	Req Detail	Statuses	Budget Information									
Dist	Status	Percent	Req BU	Req ID	Req Line	Req Sched	Req Dist	Open Qty	Requester	Requester Name	Requisition Name	Attention To	Phone	Fax
1	Open	100.00	UWSYS	0000000016	1	1	1		00856855	MCDONALD, DENISE	TESTCONFIG5	MCDONALD, DENISE		



1. Update the **Category** once the Req has been sourced to a Purchase Order.

The Buyer will need to go the chartfield tab, to take note of the Account Code from the Requisition. Changing the Category from 0000 to a new category will wipe out the Account Code.

The page below shows the effect of changing the category and the account being wiped out on the Distribution Page. Once you change the category, go to the chartfields tab and re-enter the Account code. The PO will not save without a valid Account Code.

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window ? Help Personalize Page

Maintain Purchase Order

Distributions for Schedule 1

Unit: UWSYS Vendor: MACWORLD-001
PO ID: 0000000001 Item: [Computer Table](#)
Line: 1
Schedule: 1 Status: Active

*Distribute By: Quantity Schedule Qty: 2.0000
SpeedChart: Multi-SpeedCharts Merchandise Amount: 600.00 USD
Doc. Base Amount: 600.00 USD

Distribution Personalize | Find | View As | First 1 of 1 Last

Chartfields	Details/Tax	Asset Information	Req Detail	Statuses	Budget Information										
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity	Affiliate
1	Open	100.00	2.0000	600.00	USD	UWSYS		136	400960	6					

OK Cancel Refresh

If you did not note the account code before updating the category, go back to the Manage requisition page and view the requisition to get the account code.

Main Menu > eProcurement > Manage Requisitions



2. If Matching has been implemented at your site, flag the PO as “Amount Only.” This will prevent unnecessary Match exceptions based on quantity. See the below screen shots. Please note, flagging a PO as “Amount Only” will be change the PO quantity to 1, if it is not already at 1, and change the merchandise amount.
 - a. Click the Line Details button to view the Details for Line page.

Shared Financial System
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order
Purchase Order

Business Unit: UWSYS Expiration Date:
PO ID: 000000003
Copy From: Source Document:

PO Status: Dispatched Budget Status: Valid
☐ Hold From Further Processing

*Header
*PO Date: 03/09/2017 Vendor Search
*Vendor: GILLWAREIN-001 Vendor Details
*Vendor ID: 0000000020 GILLWARE, INC
*Buyer: 00616443 DUBOIS, MARCEL
PO Reference: Emergency Procurement PO, C-3 *PO Type: GEN
Activity Summary
PO Defaults
Requisitions
PO Activities
Edit Ship To Comments

*Amount Summary
Merchandise: 10,000.00
Freight/Tax/Misc.: 0.00
Total Amount: 10,000.00 USD
Encumbrance Balance: 10,000.00 USD
Calculate

Select Lines To Display
Line: To: Retrieve

Lines
Details | Ship To | Date | Status | Item Information | Attributes | BFO | Contract | Receiving | **Item**

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	Eng. Eval. Time for LTO 5 Tapes	Eng. Eval. Time for LTO 5 Tapes	50.0000	EA	92023	200.00000	10,000.00	Approved

View Printable Version
Close Short All Lines
*Go to: More ...
Save Return to Search Notify Refresh Add Update/Display

3. Expand Attributes and check off the box next to “Amount Only.” Click OK and save the PO. A message may appear confirming you are OK with a PO quantity of 1, select “OK.”

Shared Financial System
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order
Details for Line 1

PO ID: 000000003 Vendor: GILLWAREIN-001
Line: 1 Item ID: Eng. Eval. Time for LTO 5 Tapes

Line Details
Category: 92023 Line Status: Approved
Description: Data Recovery Services Backorder Status: Not Backordered
Category ID: 06410
Amount to Receive: 10,000.00 USD
Quantity to Receive: 50.0000
Transaction Item Description: Eng. Eval. Time for LTO 5 Tapes
Preferred Language Item Description:

Expand All Collapse All
Item Information
Attributes
Physical Nature: Goods
*Price Qty: Schedule Quantity
*Price Date: PO
RFQ
Contract
Receiving
OK Cancel Refresh

Expand Attributes Section and Check Off "Amount Only." Click OK and Save.

☒ Amount Only

4. Once all the PO updates are completed, the steps/process of managing a PO will be the same as before. You can Dispatch using the Print or Email Function. Instructions on PO Email Dispatch are listed below.



PO Email Dispatch

Dispatching the PO using Email allows you to electronically send the dispatched PO directly to the vendor. It is recommended that once a valid email address is obtained for a vendor, it should be added to the Vendor file on the Vendor Address tab for future use. This will allow the email address to be automatically populated in the PO Email Dispatch Options Page.

Please note, these types of updates should be forwarded and handled by your Accounts Payable group.

University of Wisconsin Shared Financial System

Vendor Information > Add/Update > Vendor

Summary | Identifying Information | **Address** | Contacts | Location | Custom

SetID: UWADM
Vendor ID: 0000000016
Short Vendor Name: CHEZVOUSCA-001
Name: CHEZ VOUS CATERERS & BAKERS

Vendor Address

Address ID: 1
Description:

Details

Effective Date: 01/01/1900 Effective Status: Active

Address 1: 831 WILLIAMSON ST
Address 2:
Address 3:
City: MADISON
County:
State: WI
Postal: 53706-3547
Email ID: **dmcDonald@uwsa.edu**

Payment/Withholding Alt Names

Phone Information

*Type Location Prefix Telephone Extension

Save Return to Search Notify Add Update/Display Include History Correct History

People Soft provides 3 ways to electronically dispatch a PO via Email.

- i. Buyer's Workbench
- ii. Overnight Batch Job
- iii. Select PO Email Dispatch from Maintain Purchase Order Page.



Below are the steps to electronically dispatch the PO from the Maintain Purchase Order Page.

Main Menu > Purchasing > Purchase Orders > Add/Update POs

1. Once the PO has been Approved, Budget Checked, and Saved, use the drop down menu next to Dispatch and Select Email. Once you select “Email” Click the Dispatch Button.

2. Update the email addresses, if required and click “OK.”



3. The Below Message will appear. Click “Yes” to electronically dispatch the PO to the Vendor.

4. You will be brought back to the Maintain Purchase Order Page. You are done.



PO Email Dispatch with Attachments

The below screen shots provide instructions on including attachments with email dispatched PO's.

favorites Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit: UWADM Expiration Date:

PO ID: X817183 PO Status: Dispatched

Change Order: 2 Budget Status: Valid

Copy From: Source Document: ☐ Hold From Further Processing

Header

*PO Date: 11/17/2016 Vendor Search

*Vendor: SITEIMPROV-001 [Vendor Details](#)

*Vendor ID: 0000007636 SITEIMPROVE, INC

*Buyer: 00848539 JONES, JESSICA

PO Reference: DSOS-UWSA *PO Type GEN

[Header Details](#) [Activity Summary](#) [Document Status](#) [Requisitions](#) [Add Comments](#) [Add ShipTo Comments](#)

Doc Tol Status: Valid

Backorder Status: Not [Create BackOrder](#)

Receipt Status: Not Recvd

*Dispatch Method: Email

Amount Summary

Merchandise: 23,325.00

Freight/Tax/Misc.: 0.00

Total Amount: 23,325.00 USD

Encumbrance: 23,325.00 USD

Balance:

Add Items From

Purchasing Kit Catalog Item Search

Select Lines To Display

Line: To:

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status		
1		Web Governance Suite Period: December 5, 2016 - December 4, 2017	3.0000	EA	20854	7,775.00000	23,325.00	Approved		

[View Printable Version](#) *Go to: ... More ...

Click to add comments
and attachments

1) Enter comments 2) click Attach to add attachment 3) Check Off Email, if you want attachment included in PO dispatch email 4) Hit OK to go back to main page and save PO

PO Line Comments

Business Unit: UWADM PO ID: X617183 Vendor: SITEIMPROV-001 Change Order: 2

Line: 1

☒ Retrieve Active Comments Only

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending

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

[Use Standard Comments](#) [Use Item Specifications](#)

Comment Status: Active

TESTING IF COMMENTS COME THROUGH

☒ Send to Vendor ☒ Show at Receipt

☒ Show at Voucher

Associated Document

Attachment:

From -> PO UWADM-X617183-1

to add multiple attachments, hit the plus sign.

Maintain Purchase Order

Purchase Order

Business Unit: UWADM Expiration Date: PO Status: Approved Budget Status: Valid

PO ID: X617183 Change Order: 3

Copy From: Source Document: ☐ Hold From Further Processing

Header

*PO Date: 11/17/2016 Vendor Search

*Vendor: SITEIMPROV-001 [Vendor Details](#)

*Vendor ID: 0000007636 SITEIMPROVE, INC.

*Buyer: 00848539 JONES, JESSICA

PO Reference: DSOS-UWSA *PO Type: GEN

[Header Details](#) [Activity Summary](#) [Document Status](#) [Requisitions](#) [Add Comments](#) [Add ShipTo Comments](#)

Doc Tot Status: Valid **Backorder Status:** Not **Receipt Status:** Backordered Not Recvd [Create BackOrder](#)

*Dispatch Method:

Amount Summary

Merchandise:	31,100.00
Freight/Tax/Misc.:	0.00
Total Amount:	31,100.00 USD
Encumbrance:	31,100.00 USD
Balance:	

Select Lines To Display

Line: To:

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Web Governance Suite Period: December 5, 2016 - December 4, 2017	4.0000	EA	20854	7,775.00000	31,100.00	Approved

[View PO's Version](#) *Go to: ... More ...

1) Click Save
2) Select Email and Click Dispatch

Dispatch Options

Dispatch Options

Fax Cover Page:

Server Name:

PSUNX x

*Output Destination Type:

WEB

*Output Destination Format:

PDF

☐ Test Dispatch

☒ Print BU Comments

☐ Print Duplicate on PO

☒ Print Changes Only

☒ Print PO Item Description

Process Control Option

Vendor/Contact Fax/Email

Email ID:

sfstesting@uwsa.edu

One Time Fax/Email

The following fax / e-mail will override the vendor/contact information above if specified.

Email ID:

dmcDonald@uwsa.edu

OK

Cancel

Refresh

1) enter email if Email
ID: email is not correct
2)Click OK