

Quick Reference Tip Sheet

LAST REVISED DATE: 03/21/2018

General Information

Task	Process Information
<p>Creating an Express PO (Purchase Order)</p> <p>Note: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>An Express PO is a purchase order created for items less than or equal to \$2,500 (or less than or equal to \$500 for District Court). This document also serves as a formal purchase order for Blanket Contract vendors requiring one.</p> <p>NOTE - for AOC, Circuit Courts, Appellate Courts, and Programs: Per the FY15 Procurement Policy Change, Express POs <u>will no longer be REQUIRED</u> for purchases under the State Contracts/BPOs for purchases less than or equal to \$2,500. These contracts include Rudolph’s Office Supply, Staples, MD Correctional, etc. A voucher (non-PO voucher) can be processed without adding an Express PO. Express POs are optional for these Contracts/BPOs. You may continue to create Express POs if they meet the business practices of your Court or Program, or if they are requested by the vendor.</p> <p>Express POs <u>will continue to be REQUIRED</u> for purchases under the Judiciary Blanket Contracts as a way for the DPCGA to track the contract values. They are also <u>REQUIRED</u> for any purchases under State Contracts/BPOs for purchases over \$2,500.</p> <p>Please always refer to the complete list of Contract/BPOs for the most current information on requirements for Express POs, which can be found on the GEARS Tip Sheet page. Please be sure to use the exact Vendor ID referenced on the Contract/BPO listing.</p> <p>NOTE – for District Court: District Court will continue to <u>REQUIRE</u> Express POs for purchases under the State Contracts/BPOs and the Judiciary Contracts/BPOs.</p>

Before you Begin

If you do NOT know the GEARS Vendor ID to be used on the voucher, you can look it up using the vendor’s Tax ID Number. If the Vendor ID is known and has been reviewed for accuracy, you can skip this step and enter the Vendor ID in step 3 below.

Note: Please verify the vendor address to be sure it is accurate. If not, please complete a Vendor Maintenance Form and send it to the Department of Budget and Finance (DBF). The form is available on the GEARS website:

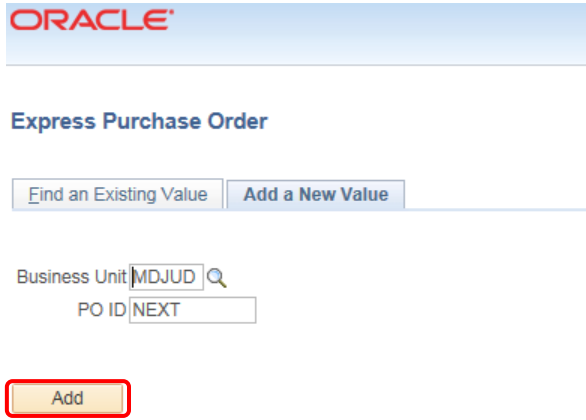
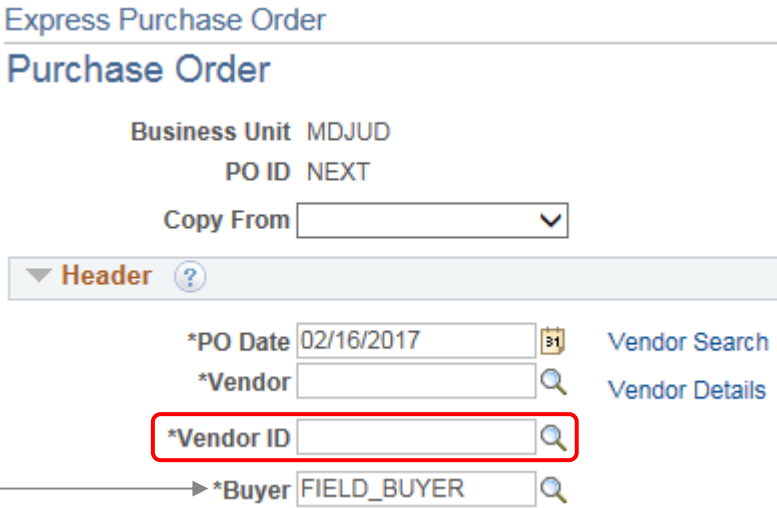
<http://mdcourts.gov/gears/forms.html>

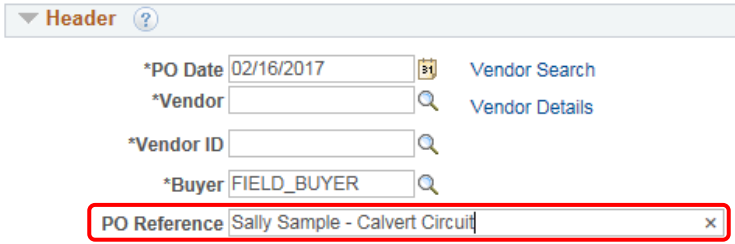
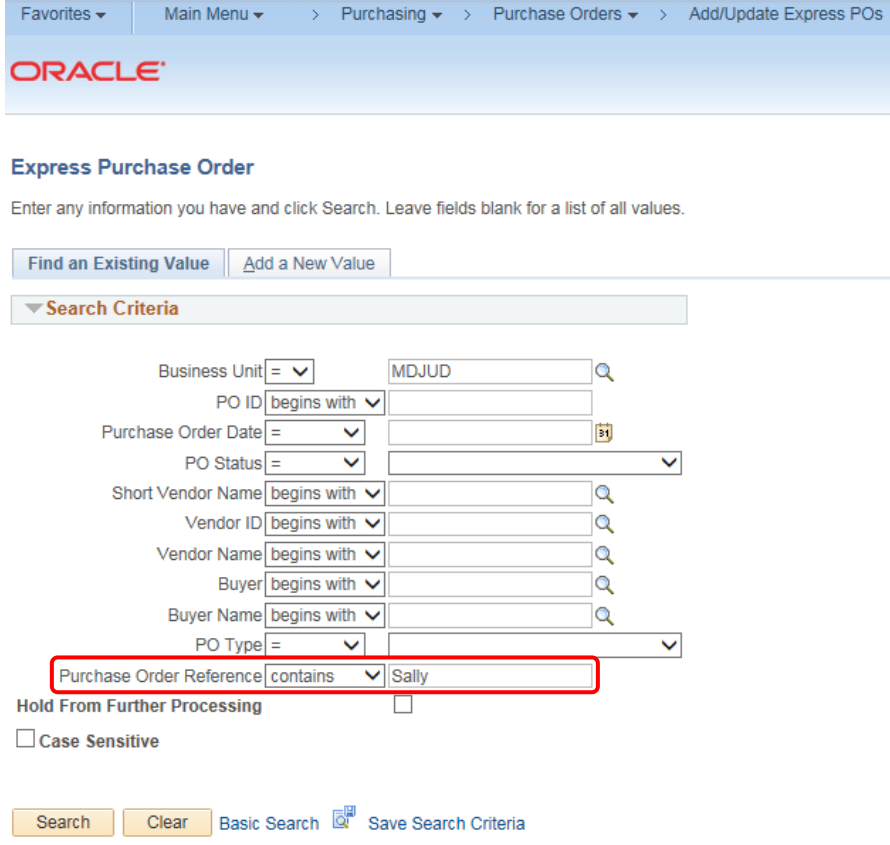
GEARS Navigation

Purchasing > Purchase Orders > Add/Update Express POs	Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update Express POs
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	Select the "Add a New Value" Tab and click on the Add button.	 <p>The screenshot shows the Oracle Express Purchase Order interface. At the top is the Oracle logo. Below it is the title 'Express Purchase Order'. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below the buttons are input fields for 'Business Unit' (containing 'MDJUD') and 'PO ID' (containing 'NEXT'). At the bottom, the 'Add' button is highlighted with a red border.</p>
2.	On the Express Purchase Order Purchase Order screen, select / enter Vendor ID (as found in "Before you Begin" at the top of this document). NOTE: The Buyer should read "FIELD_BUYER".	 <p>The screenshot shows the 'Express Purchase Order' screen. The title is 'Purchase Order'. It displays 'Business Unit MDJUD' and 'PO ID NEXT'. There is a 'Copy From' dropdown menu. Below this is a 'Header' section with a question mark icon. It contains several fields: '*PO Date' (02/16/2017), '*Vendor', and '*Vendor ID' (highlighted with a red border). To the right of these fields are links for 'Vendor Search' and 'Vendor Details'. At the bottom, there is a '*Buyer' field containing 'FIELD_BUYER'. A red arrow points from the 'NOTE' in the action column to the '*Buyer' field.</p>

<p>3.</p>	<p>NOTE: This step is optional.</p> <p>Enter PO Reference:</p>	<p>OPTIONAL: In the PO Reference field, enter descriptive information such as your name or court location to make it easier to search for your Express POs later.</p>  <p>The screenshot shows a 'Header' section with several input fields: *PO Date (02/16/2017), *Vendor, *Vendor ID, *Buyer (FIELD_BUYER), and PO Reference (Sally Sample - Calvert Circuit). The PO Reference field is highlighted with a red box.</p> <p>This will aid in searching for this PO at a later date:</p>  <p>The screenshot shows the Oracle Express Purchase Order search interface. It includes a breadcrumb trail: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update Express POs. Below the Oracle logo, there is a section for 'Express Purchase Order' with instructions to enter information and click Search. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Under 'Search Criteria', there are several dropdown menus and text boxes for Business Unit (MDJUD), PO ID, Purchase Order Date, PO Status, Short Vendor Name, Vendor ID, Vendor Name, Buyer, Buyer Name, and PO Type. The 'Purchase Order Reference' dropdown is set to 'contains' and the text box contains 'Sally', which is highlighted with a red box. At the bottom, there are 'Search' and 'Clear' buttons, and links for 'Basic Search' and 'Save Search Criteria'.</p>
<p>4.</p>	<p>NOTE: Steps 4 through 6 are optional. These steps allow you to change the Billing Location (where the Invoice should be sent).</p> <p>To update the Billing Location:</p> <p>Click the Header Details link.</p>	<p>OPTIONAL: If the invoice needs to be sent to a separate location, other than where the goods were shipped, enter the billing location.</p> <p>PO Reference <input type="text"/></p> <p>Header Details Activity Summary</p> <p>PO Defaults Add Comments</p> <p>PO Activities Add ShipTo Comments</p> <p>▼ Actions</p>

5. **NOTE: Steps 4 through 6 are optional. These steps allow you to change the Billing Location (where the Invoice should be sent).**

Enter the Billing Location or click the  magnifying glass to select the Billing Location.

PO Header Details

PO Details

Vendor MEDI-001 PO Date 02/17/2017
 *PO Type GEN Budget Status Not Chk'd
 *Billing Location AOC Billing Address Tax Exempt
 ID 30002563
 Origin ONL Online Letter of Credit ID
 Use One Ship To Ship To JIS - MAIN

Currency

Currency Code USD Exchange Rate Detail Base Currency USD
 Rate Date 02/17/2017 Exchange Rate 1.00000000
 Rate Type CRRNT

Process Control Option

Dispatch Acknowledgements required for Not required
 *Method Print Accounting Date 02/17/2017
 Template ID Accounting Template STANDARD

OK Cancel Refresh

Look Up Billing Location

SetID SHARE

Location Code begins with
 Description begins with

Look Up Clear Cancel Basic Lookup


Search Results

View 100 First 1-248 of 248 Last

Location Code	Description
19	CIRCUIT COURT/SOMERSET COUNTY
24	CIRCUIT COURT/BALTIMORE CITY
50	DISTRICT COURT HEADQUARTERS
56	DC/CARROLL ADM CLK-WESTMINSTER
62	DISTRICT COURT/HARFORD COUNTY
AOC	ADMIN OFFICE OF COURTS
AOC-ACC	ACCESS TO JUSTICE DEPARTMENT
AOC-ADMN	AOC / ADMINISTRATIVE SERVICES
AOC-CBO	AOC / COURT BUSINESS OFFICE
AOC-CONFL	MEDIATION & CONFLICT RESL
AOC-COPS	AOC /COURT OPERATIONS
AOC-DBF	AOC/ BUDGET & FINANCE
AOC-DPCA	AOC / PROCUREMENT & CONTRACT
AOC-EMER	AOC / EMERGENCY PREP

6. **NOTE: Steps 4 through 6 are optional. These steps allow you to change the Billing Location (where the Invoice should be sent).**

Click the [Billing Address](#) link to verify the Bill To Address.

Click the  button and continue creating the PO.

Vendor MEDI-001
 PO Type GEN
 Location AOC [Billing Address](#)
 Origin ONL Online
 Use One Ship To

Currency Code USD Exchange Rate Detail
 Rate Date 02/17/2017
 Rate Type CRRNT

Dispatch
 Method Print
 Template ID

PO Header Details - Bill To Address

Location AOC

Billing Address

Address 1 580 TAYLOR AVE
 Address 2
 Address 3
 Address 4
 City Annapolis
 State MD Postal 21401-2352
 Country USA

OK Cancel Refresh

7. **NOTE: Steps 7 through 10 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.**

Click on the PO Defaults Link.

Express Purchase Order
Purchase Order

Business Unit MDJUD PO ID NEXT Vendor MEDI-001

PO Status Open Budget Status Not Chk'd

Copy From [] [] Hold From Further Processing

Header

*PO Date 02/17/2017 Vendor Search

*Vendor MEDI-001 Vendor Details

*Vendor ID 0000005284 MEDI

*Buyer FIELD_BUYER

PO Reference []

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

Receipt Status Not Recvd
 *Dispatch Method Print Dispatch

Amount Summary

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

Add Items From Catalog Item Search Purchasing Kit

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1						0.0000	Open

254 characters remaining

8. **NOTE: Steps 7 through 10 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.**

Click the Override button, then enter your SpeedChart (PCA) and click

Refresh

Purchase Order Defaults

Business Unit MDJUD PO ID NEXT Vendor MEDI-001

Default Options

Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are used.

Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category [] Unit of Measure []

Schedule

Ship To JIS - MAIN JUDICIAL INFORMATION SYSTEMS Ultimate Use Code []

Due Date [] Original Promise Date []

Ship Via COMMON Freight Terms Code DES

Arbitration [] Freight Charge Method []

*Distribute By Quantity One Time Address

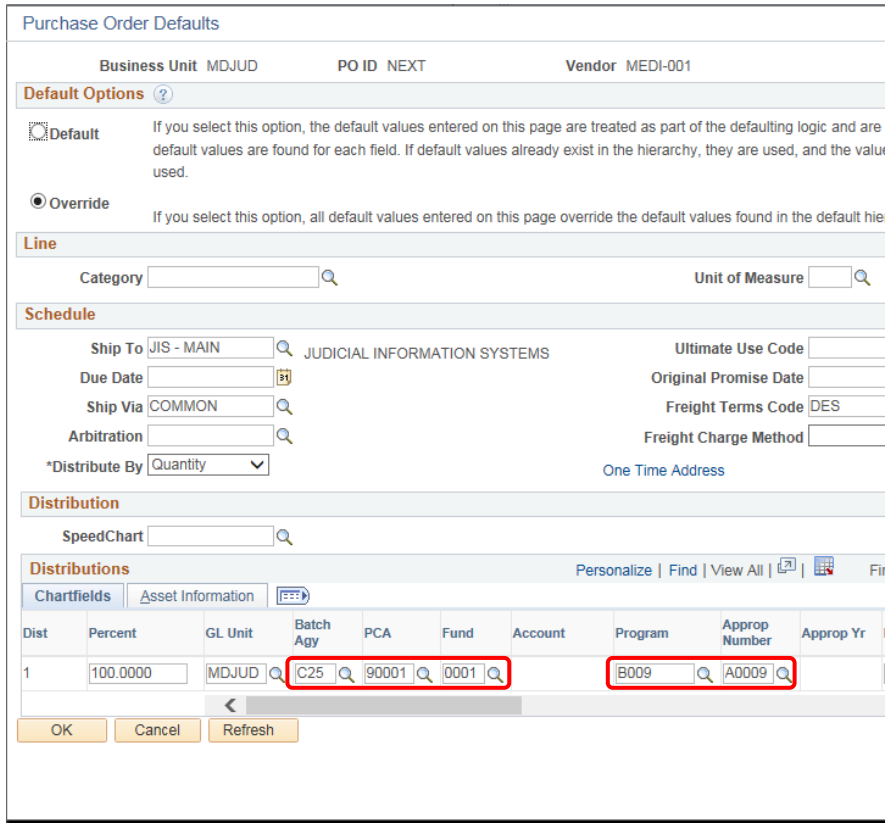
Distribution

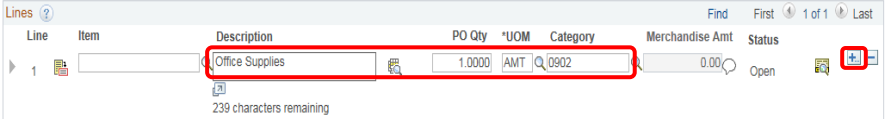
SpeedChart 90001 x


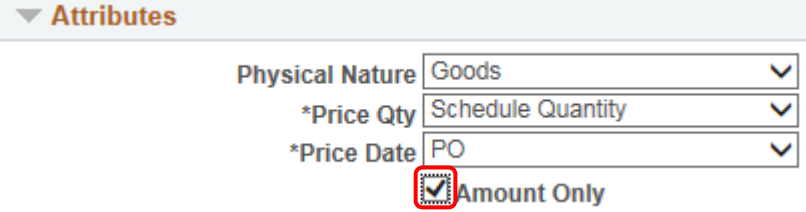

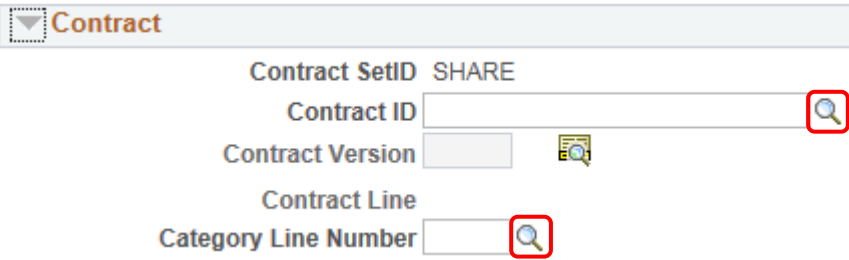
Distributions Personalize Find View All






Dist	Percent	GL Unit	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	Dept
1		MDJUD								







OK Cancel **Refresh**




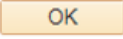
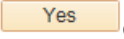



<p>9.</p> <p>NOTE: Steps 7 through 10 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.</p> <p>Entering a SpeedChart will fill in your Chartfield values (i.e., accounting codes), with the exception of the "Account" and "Approp Yr".</p> <p>NOTES:</p> <p>A. For FY16 transactions and forward, Account and Approp Yr are no longer allowed defaults. These two fields will be populated in later steps.</p> <p>B. Other defaults may be entered, such as Ship To.</p> <p>C. The defaults entered here will populate on <u>ALL</u> distribution lines.</p>	 <p>Purchase Order Defaults</p> <p>Business Unit MDJUD PO ID NEXT Vendor MEDI-001</p> <p>Default Options ?</p> <p><input type="checkbox"/> Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are default values are found for each field. If default values already exist in the hierarchy, they are used, and the value used.</p> <p><input checked="" type="radio"/> Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.</p> <p>Line</p> <p>Category <input type="text"/> Unit of Measure <input type="text"/></p> <p>Schedule</p> <p>Ship To JIS - MAIN JUDICIAL INFORMATION SYSTEMS Ultimate Use Code <input type="text"/></p> <p>Due Date <input type="text"/> Original Promise Date <input type="text"/></p> <p>Ship Via COMMON Freight Terms Code DES</p> <p>Arbitration <input type="text"/> Freight Charge Method <input type="text"/></p> <p>*Distribute By Quantity One Time Address <input type="checkbox"/></p> <p>Distribution</p> <p>SpeedChart <input type="text"/></p> <p>Distributions Personalize Find View All <input type="button"/> <input type="button"/> Fir</p> <table border="1"> <thead> <tr> <th>Dist</th> <th>Percent</th> <th>GL Unit</th> <th>Batch Agy</th> <th>PCA</th> <th>Fund</th> <th>Account</th> <th>Program</th> <th>Approp Number</th> <th>Approp Yr</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>100.0000</td> <td>MDJUD</td> <td>C25</td> <td>90001</td> <td>0001</td> <td></td> <td>B009</td> <td>A0009</td> <td></td> </tr> </tbody> </table> <p><input type="button"/> OK <input type="button"/> Cancel <input type="button"/> Refresh</p>	Dist	Percent	GL Unit	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr	1	100.0000	MDJUD	C25	90001	0001		B009	A0009	
Dist	Percent	GL Unit	Batch Agy	PCA	Fund	Account	Program	Approp Number	Approp Yr												
1	100.0000	MDJUD	C25	90001	0001		B009	A0009													
<p>10.</p>	<p>NOTE: Steps 7 through 10 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.</p> <p>Click on <input type="button"/> OK</p>																				

<p>11.</p>	<p>NOTE: Repeat steps 11 through 15 for each line on your Express PO.</p> <p>Enter Line information:</p>	<p>Fill in the following fields: Description, PO Qty, UOM and Category.</p> <p>NOTES:</p> <ul style="list-style-type: none"> You must enter a Description and other line information. <u>Failure to do so may cause unexpected results.</u> You must set-up your Express PO in the manner in which you wish to Receive (i.e. Quantity or Amount). To add or delete a line, click on the “+” or “-” to the right of the line. If you are creating an amount only PO, your UOM should be AMT. If you are purchasing against a Blanket Contract, please enter a category code applicable to the contract. If you do NOT know the category code(s) applicable to the contract, you can leave the category <u>blank</u>. When step 13 has been completed, the category will default onto your PO line. NOTE: If the wrong category is entered on the PO line, the Category Line Number(s) from the blanket contract may not be retrieved correctly in step 13. If you are NOT purchasing against a Blanket Contract, please enter the appropriate category for the applicable purchase on the line. For FY16 transactions and forward: The MDJUD Item Catalog and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog MDJUD Item Catalog NEW. The category codes contained in this new catalog are the same as our existing account codes. This enhancement is intended to eliminate some of the guesswork in choosing a category. <u>If you know the appropriate account code for your purchase, the category code will be the same.</u> <p>For example, if the account code to be used on your distribution line is 0902 (Office Supplies), you would choose 0902 as the category.</p> 
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<p>12.</p>	<p>For “Amount Only” Express POs –</p> <p>NOTE: Repeat steps 11 through 15 for each line on your Express PO. However, if your Express PO is <u>not</u> distributed by Amount Only but by Quantity, omit this step.</p> <p>On the <u>Details for Line 1</u> screen:</p>	<p>If you are creating an “Amount Only” Express PO, click on the Line Details icon .</p> <p>Under the Attributes section:</p> <ul style="list-style-type: none"> Check the Amount Only checkbox.  <ul style="list-style-type: none"> If you are done with all line details, click “OK” to return to the Express PO line. NOTE: When exiting the Line Details screen, “Amount Only” Express POs will display a Message indicating that the PO Qty will be set to “1”. Click “Yes” to acknowledge.
<p>13.</p>	<p>To reference Blanket Contracts –</p> <p>NOTE: Repeat steps 11 through 15 for each line on your Express PO. However, if your Express PO is <u>not</u> against a Blanket Contract, omit this step.</p> <p>On the <u>Details for Line 1</u> screen:</p>	<p>If you are creating an Express PO against a Blanket Contract, you must reference the contract by clicking the Line Details icon .</p> <p>Under the Contract section:</p> <ul style="list-style-type: none"> Search for the <u>Contract ID</u> – the contract(s) established against the vendor you have specified will display. Choose the applicable contract. Search for the <u>Category Line Number</u> – Choose the appropriate category line. The category associated with this category line will default onto your PO line.  <ul style="list-style-type: none"> If you are done with all line details, click “OK” to return to the Express PO line. NOTE: When exiting the Line Details screen, “Amount Only” Express POs will display a Message indicating that the PO Qty will be set to “1”. Click “Yes” to acknowledge.

<p>14.</p>	<p>For DISTRICT COURT Express POs –</p> <p>NOTE: Repeat steps 11 through 15 for each line on your Express PO. However, if your Express PO is <u>not</u> for District Court, omit this step.</p> <p>On the Details for Line 1 screen:</p>	<p>NOTE: This step is for DISTRICT COURT only. Receiving is required for DC Express POs.</p> <p>If you are creating an Express PO for District Court, click on the Line Details icon .</p> <p>Under the Receiving Section:</p> <ul style="list-style-type: none"> Select “Required” in the drop-down for Receiving Required. <div data-bbox="662 520 1539 703" style="border: 1px solid #ccc; padding: 5px;"> <p>Receiving</p> <p>*Receiving Required Required</p> <p><input type="checkbox"/> Inspection Required</p> <p>Inspect ID <input style="width: 100%;" type="text"/></p> </div> <ul style="list-style-type: none"> If you are done with all line details, click “OK” to return to the Express PO line. NOTE: When exiting the Line Details screen, “Amount Only” Express POs will display a Message indicating that the PO Qty will be set to “1”. Click “Yes” to acknowledge. 																																																																	
<p>15.</p>	<p>NOTE: Repeat steps 11 through 15 for each line on your Express PO.</p> <p>On the Details for Line 1 screen:</p> <p>The following are required fields:</p> <ul style="list-style-type: none"> Lines: Description, PO Qty, UOM, Category. Schedules: Due Date, Ship To, Price/Merchandise Amt. NOTE: If UOM on the line is anything other than “AMT”, enter the unit price in the “Price” field, else enter the amount in the “Merchandise Amt” field. Distributions: Account, Batch Agy, Fund, Program, Approp #, Approp Yr & PCA. NOTE: For FY16 transactions and forward: The “Account” defaults from the Category (should be the same value as the category). You cannot change the account. If a change is needed, go back and change the category. The account will be defaulted automatically, to match the category. NOTE: For FY16 transactions and forward Approp Yr will be defaulted to “AY2016”, or current Approp Year. 	<p>Once you are back on the Express PO line, expand the Express PO sections using the  icons to the left of the Line and Schedule or use the Expand All link.</p> <div data-bbox="662 1003 1550 1438" style="border: 1px solid #ccc; padding: 5px;"> <p>Lines Find First 1 of 1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>PO Qty</th> <th>*UOM</th> <th>Category</th> <th>Merchandise Amt</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td></td> <td>Office Supplies</td> <td style="text-align: center;">1.0000</td> <td style="text-align: center;">AMT</td> <td style="text-align: center;">0902</td> <td style="text-align: right;">123.45</td> <td style="text-align: center;">Open</td> </tr> </tbody> </table> <p style="font-size: small;">239 characters remaining</p> <p>Schedules Find First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Sched</th> <th>*Due Date</th> <th>*Ship To</th> <th>*PO Qty</th> <th>Price</th> <th>Merchandise Amt</th> <th>Status</th> <th>*Distribute by</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">02/17/2017</td> <td style="text-align: center;">JIS - MAIN</td> <td style="text-align: center;">1.0000</td> <td style="text-align: right;">123.45000</td> <td style="text-align: right;">123.45</td> <td style="text-align: center;">Active</td> <td style="text-align: center;">Amount</td> </tr> </tbody> </table> <p>Distributions Personalize Find View All First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th>Chartfields</th> <th>Details/Tax</th> <th>Asset Information</th> <th>Req Detail</th> <th>Statuses</th> <th>Budget Information</th> <th>Approp Yr</th> </tr> <tr> <th>Dist</th> <th>Status</th> <th>Percent</th> <th>Merchandise Amt</th> <th>Curr</th> <th>*GL Unit</th> <th>Batch Agy</th> <th>PCA</th> <th>Fund</th> <th>*Account</th> <th>Program</th> <th>Approp Number</th> <th>Approp Yr</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">Open</td> <td style="text-align: center;">100.0000</td> <td style="text-align: right;">123.45</td> <td style="text-align: center;">USD</td> <td style="text-align: center;">MDJUD</td> <td style="text-align: center;">C25</td> <td style="text-align: center;">90001</td> <td style="text-align: center;">0001</td> <td style="text-align: center;">0902</td> <td style="text-align: center;">B009</td> <td style="text-align: center;">A0009</td> <td style="text-align: center;">AY2017</td> </tr> </tbody> </table> <p>Expand All Collapse All</p> </div> <div data-bbox="1096 1438 1485 1564" style="border: 2px solid #ccc; border-radius: 50%; padding: 10px; display: inline-block; text-align: center;"> <p>Defaulted Approp Year</p> </div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Office Supplies	1.0000	AMT	0902	123.45	Open	Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by	1	02/17/2017	JIS - MAIN	1.0000	123.45000	123.45	Active	Amount	Chartfields	Details/Tax	Asset Information	Req Detail	Statuses	Budget Information	Approp Yr	Dist	Status	Percent	Merchandise Amt	Curr	*GL Unit	Batch Agy	PCA	Fund	*Account	Program	Approp Number	Approp Yr	1	Open	100.0000	123.45	USD	MDJUD	C25	90001	0001	0902	B009	A0009	AY2017
Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status																																																												
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Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by																																																												
1	02/17/2017	JIS - MAIN	1.0000	123.45000	123.45	Active	Amount																																																												
Chartfields	Details/Tax	Asset Information	Req Detail	Statuses	Budget Information	Approp Yr																																																													
Dist	Status	Percent	Merchandise Amt	Curr	*GL Unit	Batch Agy	PCA	Fund	*Account	Program	Approp Number	Approp Yr																																																							
1	Open	100.0000	123.45	USD	MDJUD	C25	90001	0001	0902	B009	A0009	AY2017																																																							

16.	Click the  button.									
17.	Confirm your Express PO is saved.	<p>If the Express PO has been saved, you will have a (10) digit Purchase Order ID.</p> <p style="text-align: center;">Express Purchase Order Purchase Order</p> <p style="text-align: center;">Business Unit MDJUD PO ID 0000061149</p>								
18.	To add Comments and Attachments:	<p>General Express PO comments/attachments:</p> <ul style="list-style-type: none"> click the Add Comments Header link select a group to display your comments to: <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Send to Vendor</td> <td><input type="checkbox"/> Show at Receipt</td> </tr> <tr> <td><input type="checkbox"/> Show at Voucher</td> <td><input type="checkbox"/> Approval Justification</td> </tr> </table> <p>Line specific comments/attachments:</p> <ul style="list-style-type: none"> click the  icon to the right of the Express PO Line select a group to display your comments to <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Send to Vendor</td> <td><input type="checkbox"/> Show at Receipt</td> </tr> <tr> <td><input type="checkbox"/> Show at Voucher</td> <td></td> </tr> </table> 	<input type="checkbox"/> Send to Vendor	<input type="checkbox"/> Show at Receipt	<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification	<input type="checkbox"/> Send to Vendor	<input type="checkbox"/> Show at Receipt	<input type="checkbox"/> Show at Voucher	
<input type="checkbox"/> Send to Vendor	<input type="checkbox"/> Show at Receipt									
<input type="checkbox"/> Show at Voucher	<input type="checkbox"/> Approval Justification									
<input type="checkbox"/> Send to Vendor	<input type="checkbox"/> Show at Receipt									
<input type="checkbox"/> Show at Voucher										
19.	Submit Express PO for approval.	<p>Select the <input checked="" type="checkbox"/> to submit your Express PO for approval.</p> <p>NOTE: Please refer to the Approval Levels and Dollar Thresholds document for more information about the Judiciary’s approval levels for each type of workflow transaction.</p> <p>NOTE: You cannot move forward with the remaining steps until the Express PO has been approved. You will receive an email notification as well as a Worklist; item when it has been approved.</p>								
20.	Budget Check your Express PO.	<p>Only upon an “Approved” PO Status will you be able to run the Budget Check process by clicking the Budget Check icon .</p> <p style="text-align: center;"> PO Status Approved   Budget Status Not Chk'd  </p>								

<p>21.</p>	<p>Dispatch your Express PO.</p>	<p>Only upon an “Approved” PO Status and a “Valid” Budget Status will you be able to run the Dispatch process by clicking the  button.</p> <p>NOTE: Dispatching your Express PO is <u>required</u> in order to Receive and Voucher against the Express PO.</p> <p style="text-align: center;">*Dispatch Method <input type="text" value="Print"/> </p> <p>NOTE: The Dispatch Method defaults to “Print” but can be changed to “Email” for those vendors who have an email address associated with their vendor information on the Vendor Master File maintained by DBF.</p> <p style="text-align: center;">*Dispatch Method <input type="text" value="Email"/> </p>										
<p>22.</p>	<p>Confirm the Dispatch Options & complete your Express PO.</p>	<p>Dispatching via the “Print” method will display the following Dispatch Options.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p style="text-align: right; margin: 0;">x</p> <p style="margin: 0;">Dispatch Options Help</p> <p><input type="checkbox"/> Use One Ship To Ship To JIS - MAIN</p> <hr/> <p>Dispatch Options</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Fax Cover Page <input type="text"/></td> <td style="width: 50%;"><input type="checkbox"/> Test Dispatch</td> </tr> <tr> <td>Server Name <input type="text"/> <input type="button" value="Q"/></td> <td><input type="checkbox"/> Print BU Comments</td> </tr> <tr> <td>*Output Destination Type <input type="text" value="WEB"/></td> <td><input type="checkbox"/> Print Duplicate on PO</td> </tr> <tr> <td>Output Destination Format <input type="text" value="PDF"/></td> <td><input checked="" type="checkbox"/> Print PO Item Description</td> </tr> <tr> <td>Template ID <input type="text"/> <input type="button" value="Q"/></td> <td><input type="checkbox"/> Print Copy</td> </tr> </table> <p style="text-align: center; margin-top: 5px;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/> </p> </div> <p>There is no need to alter these options, just click the  button, then select  on the pop-up message to wait for the Dispatch process to complete. Waiting for this process to complete will allow you to view the Express PO status as Dispatched.</p> <p>NOTE: You can click “No” rather than waiting for the Dispatch process to complete, however you will have to look up your Express PO to view the Dispatched status.</p>	Fax Cover Page <input type="text"/>	<input type="checkbox"/> Test Dispatch	Server Name <input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Print BU Comments	*Output Destination Type <input type="text" value="WEB"/>	<input type="checkbox"/> Print Duplicate on PO	Output Destination Format <input type="text" value="PDF"/>	<input checked="" type="checkbox"/> Print PO Item Description	Template ID <input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Print Copy
Fax Cover Page <input type="text"/>	<input type="checkbox"/> Test Dispatch											
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Template ID <input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Print Copy											
<p>23.</p>	<p>Your Express PO is complete.</p>	<p>You will see the PO Status as “Dispatched” when the Dispatch process completes.</p> <p style="text-align: center;"> PO Status Dispatched    </p> <p style="text-align: center;"> Budget Status Valid </p> <p>NOTE: The Express Purchase Order must have these statuses to be received and vouchered against.</p>										

24. Once Dispatched, you can review the PDF version of the Express Purchase Order in your Report Manager under the Administration Tab.

Reporting Tools > Reporting Manager

The screenshot shows the Reporting Manager interface. The breadcrumb navigation is Main Menu > Purchasing > Purchase. The left sidebar contains a tree view with 'Reporting Tools' selected. The right pane shows the 'Administration' tab. Below the navigation, there are filters for 'View Reports For' (User ID: LYNN.WOYTKO, Type: Last, Instance: 1) and a 'Report List' table. The table has columns for Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. One report is listed with the description 'PO_DISPATCH - PO_DISPATCH.pdf' highlighted in red.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1143687	1192776	PO_DISPATCH - PO_DISPATCH.pdf	02/17/2017 5:35:07PM	Acrobat (*.pdf)	Posted	Details



End of Document