

## Propose Source of Supply – Carry Out Sourcing

This procedure is used to create a Purchase Order from a Shopping Cart referencing a Statewide Contract. Carry Out Sourcing is used to locate Shopping Carts through basic search functionality for further processing into a Purchaser Order.

1. Search for the Shopping Cart in Carry Out Sourcing using any of the applicable search criteria. It is recommended to utilize the Purchasing Organization and Purchasing Group to locate the Shopping Carts.
  - a. Select the Apply button.
2. When the results display, select the document number to open the Shopping Cart to review it for completeness and accuracy. Verify that the Unit of Measure and Product Category match the applicable Contract.
  - a. Select all line items in the Shopping Cart by choosing the Select all button.
  - b. Select the Next button to move to the next step in the process.

**Assign Sources of Supply: Step 1 (Select Requisition)**

◀ Previous **Next ▶** Close

1 Select Requisition    2 Assign Sources of Supply (No Items)    3 Review Drafts (No Items)    4 Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition: 11511737    Name of Requisition:

Item Description:     Product Category:

Product:

Requester:

Purchasing Organization:

Purchasing Group:

Priority:

Delivery Date Range:

Delivery Date:  To:

External Requirement:

Account Assignment Category:

Account Assignment Number:

Intended for Grouping:

Include Locked Items:

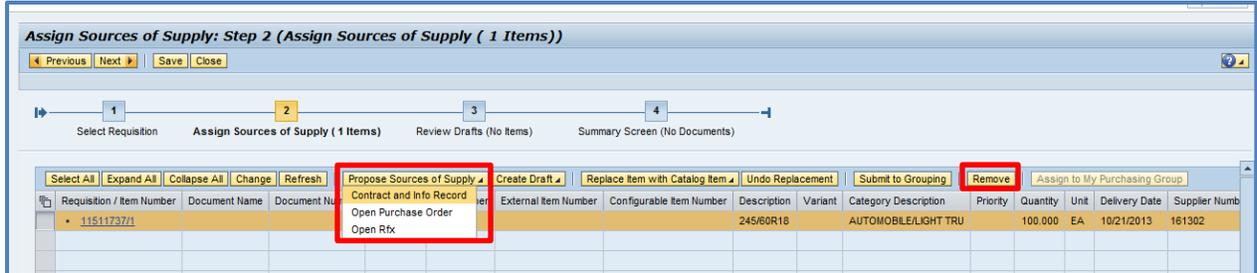
All Categories

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract
• 11511737/1	245/60R18	25172504		100.000	EA	Cynthia Anderson	10/21/2013	161302	GOODYEAR TIRE & RUBBER COMPANY INC	4400008515/1

**Note:** If there was an incorrect Shopping Cart selected, or if a line item was missed, select the Remove button to send the line items back to the previous screen; then select the Previous button to be taken back. Once all items are back in the search area, select the correct Shopping Cart or line item, or if adding additional line items, select those line items and select the Next button to take all items into Assign Source of Supply.

3. Select the Propose Source of Supply button
  - a. Select Contract and Info Record to see if a Contract exists.

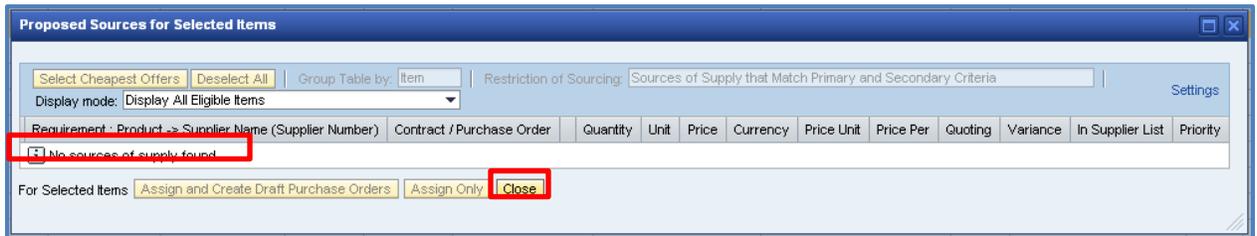
**Note:** If the Product Category is correct in the Shopping Cart, Contract information should display.



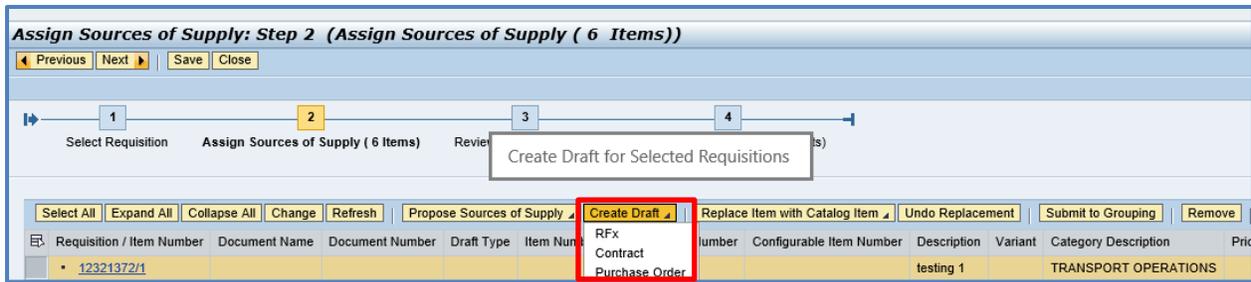
4. If a list of Contracts displays, select the applicable Contract and line item
  - a. Select the Assign and Create Draft Purchase Orders button to assign the Contract to a draft Purchase Order.



5. If the Assign and Create Draft Purchase Order button is selected, proceed to Step 7.
6. If "No sources of supply found" displays, select the Close button



- a. Select the Create Draft button
  - i. Select Purchase Order from the dropdown
- b. Select the Next button



7. This will create a draft Purchase Order and automatically move to step 3 of Carry Out Sourcing. In the Review Drafts, enter the Draft Name following the DGS Naming Convention
8. Select the Transaction Type
  - a. Select the type of Purchase Order
9. Select the Edit Selected Drafts button to move the draft into the Edit mode
  - a. **Do Not** select the Process All Drafts or Process Selected Drafts buttons as this will send the document into the approval process, or in the case of an Auto-PO, directly to the supplier.

**Note:** At any time, if it is determined that an incorrect draft type was selected, users can change the draft type by selecting the Change Selected Draft To button. A dropdown menu will display allowing users to change the type without leaving this step.

As in the previous step, users can move back a step by selecting the Remove button, then selecting the Previous button to go back a step in the process.



10. The Purchase Order will display in the Edit mode. Proceed by processing the Purchase Order in the manner it would typically be processed.