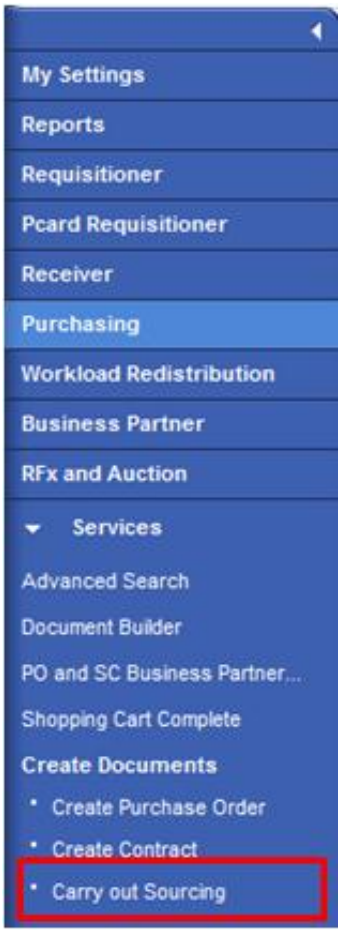
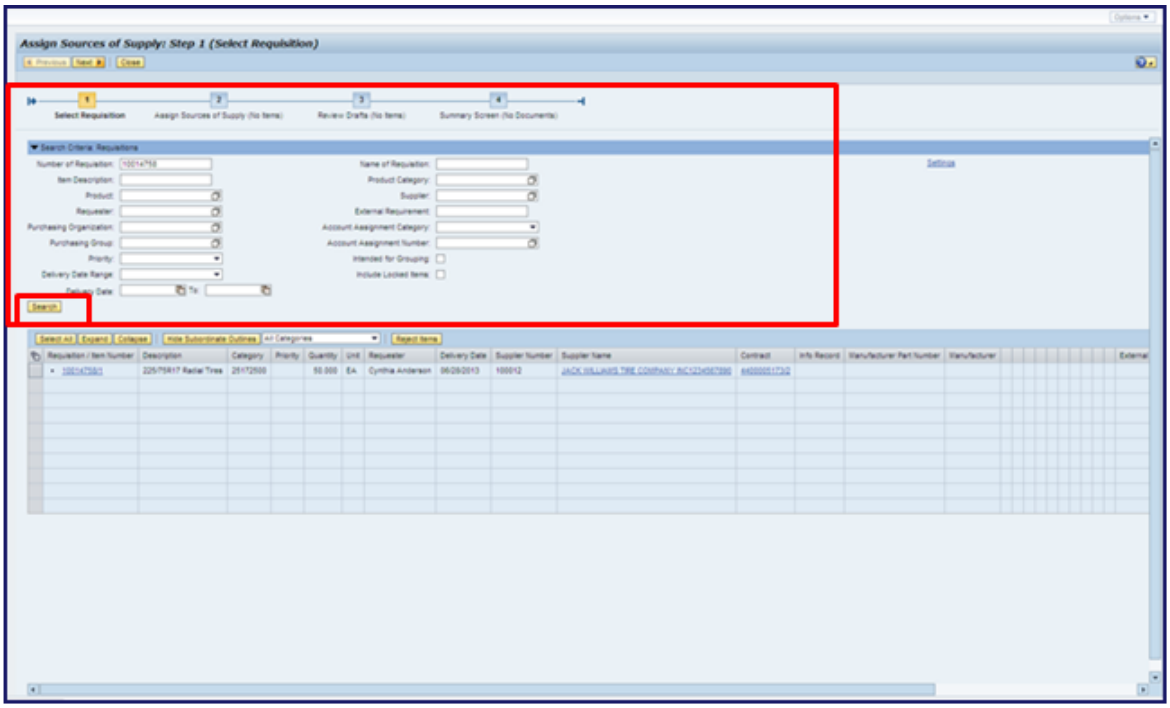
Sourcing a Requirement – Generate a Purchase Order

This procedure describes the Carry Out Sourcing process to generate a Purchase Order.

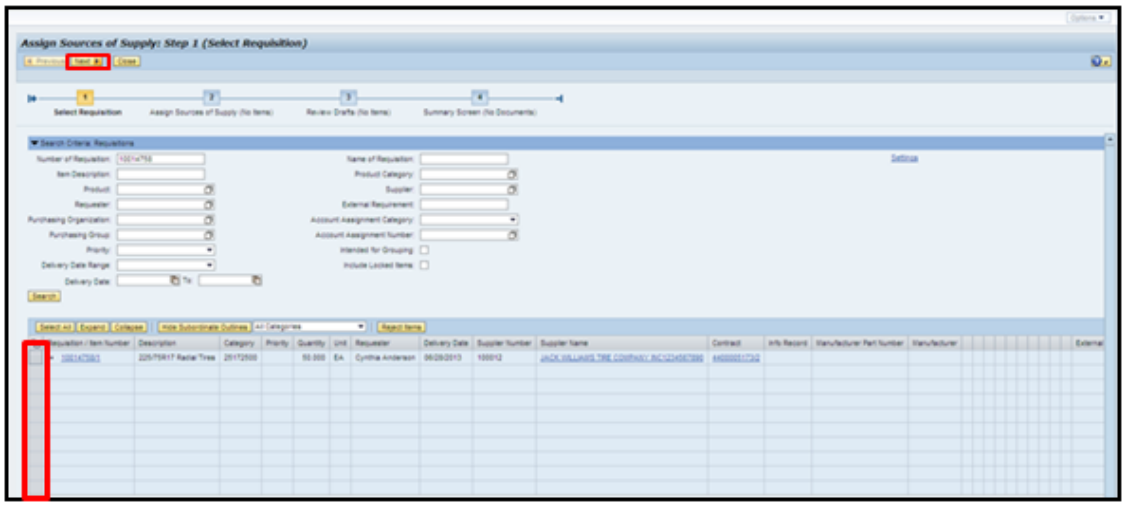
1. Select Purchasing from the left navigation page; under Create Documents, select Carry Out Sourcing



2. The Carry Out Sourcing screen displays all open assignments
   a. Search for requirements using various criteria
   b. Select the SEARCH button

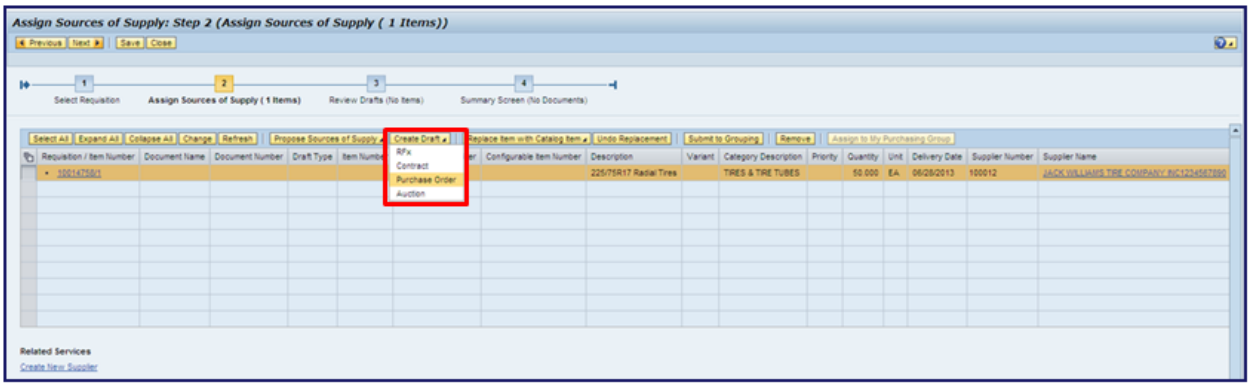


3. Select the items to be sourced. If selecting multiple items, use any of the following options:
   a. SELECT ALL button; or
   b. Hold down the Shift key, and choose the consecutive rows; or
   c. Hold down the Ctrl key, and choose various rows
4. Select the NEXT button



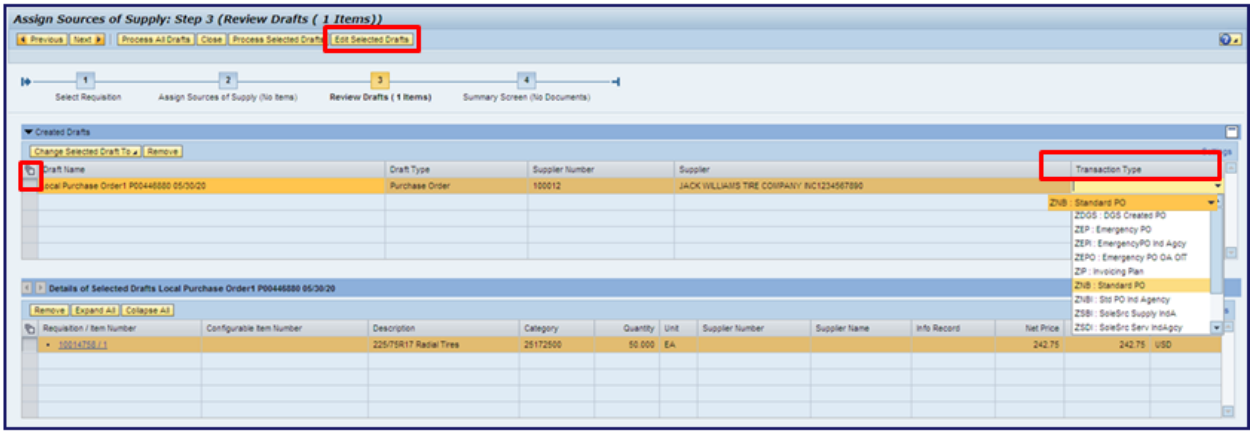
5. Make sure each line has a supplier
6. If multiple items, chose the SELECT ALL button

7. Select the CREATE DRAFT button to chose the type of procurement document you wish to create
8. Once you select the document type, you will automatically move to the next step in the wizard

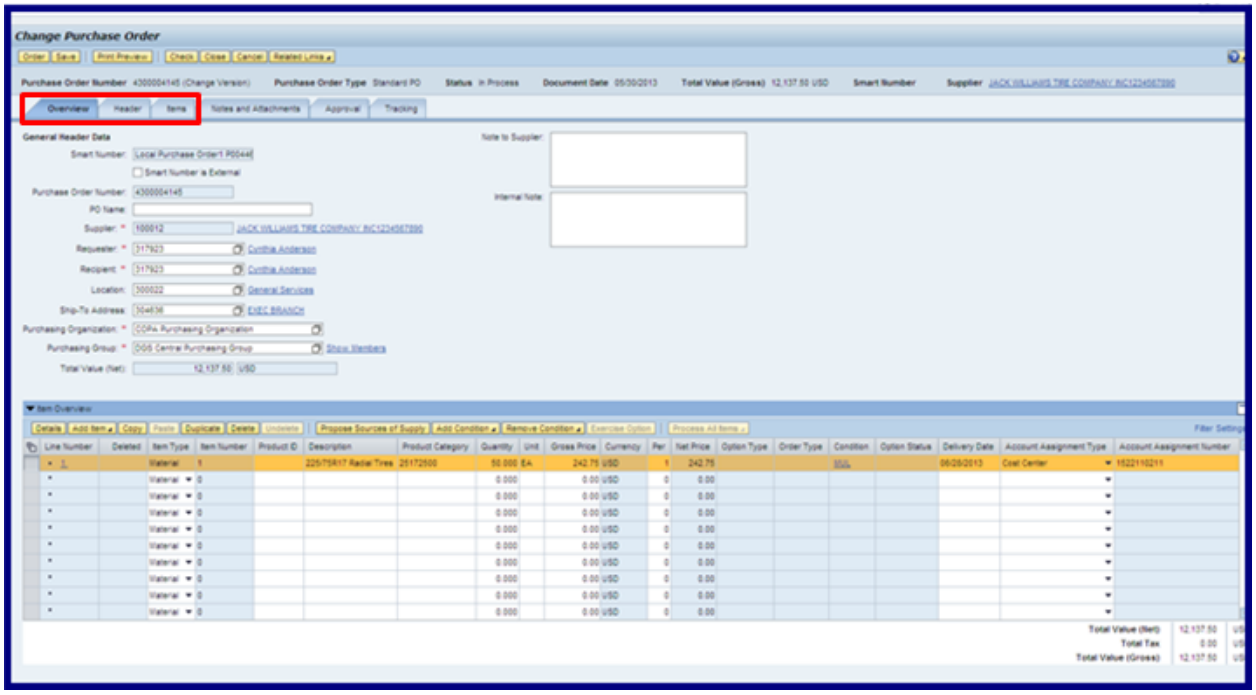
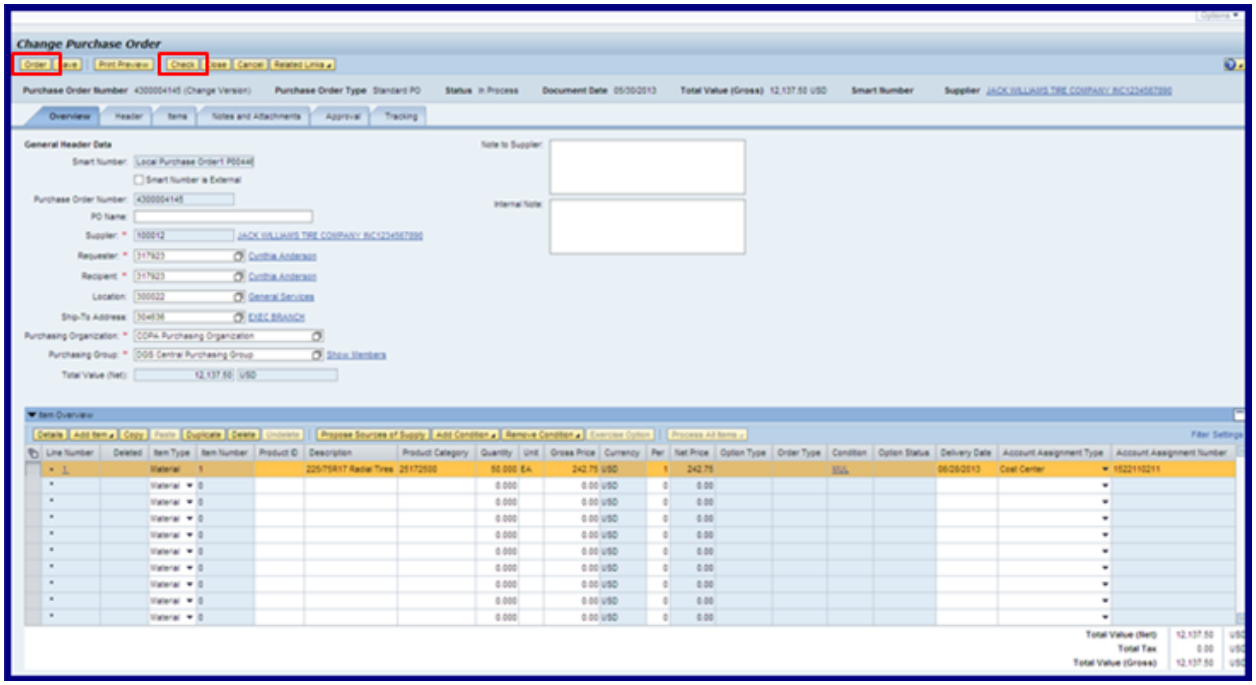


9. Highlight your Draft; in the Draft Name field, enter the name of your Draft
10. Select the Transaction Type and a dropdown menu will display, select your PO type
11. Select the EDIT SELECTED DRAFTS button

Note: Do not select the PROCESS ALL DRAFTS or PROCESS SELECTED DRAFTS buttons. *This will cause your PO to go directly into the awaiting approval status; or in the situation of an Auto-PO, it will go directly to the supplier.*



12. The Change Purchase Order screen displays. If necessary, enter any additional data into the applicable sub-tabs on the Overview, Header, and Items tabs.



13. When data entry is complete, select the CHECK button to view and resolve any errors. Then select the ORDER button to send the PO through approval workflow.