

Exercise 1

Create a Standard Purchase Order

Exercise 1: Create a Standard PO

1. Log into SRM.
2. Click **Purchasing** folder across the top of the screen.
3. Click **Purchasing** in the blue menu bar on the left-hand side.
4. Scroll to the bottom of the blue menu bar, click **Perform Sourcing**.
5. Use drop-down menu of the Delivery Date Range field to select **In 90 days** (Using the Delivery Date Range is the suggested method to locate a broader range of Shopping Carts/Requisitions).
6. Click yellow **Search** button to display approved Shopping Carts/Requisitions/Item Numbers.
7. Highlight the line of the Requisition you want to source by clicking the grey box parallel to the Requisition/Item Number.
8. Click **Next**.

Assign Sources of Supply: Step 1 (Select Requisition)

Navigation: Previous | Next | Close

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

Requester: [Field] External Requirement: [Field]

Purchasing Organization: [Field] Account Assignment Category: [Dropdown]

Purchasing Group: [Field] Account Assignment Number: [Field]

Priority: [Dropdown] Intended for Grouping:

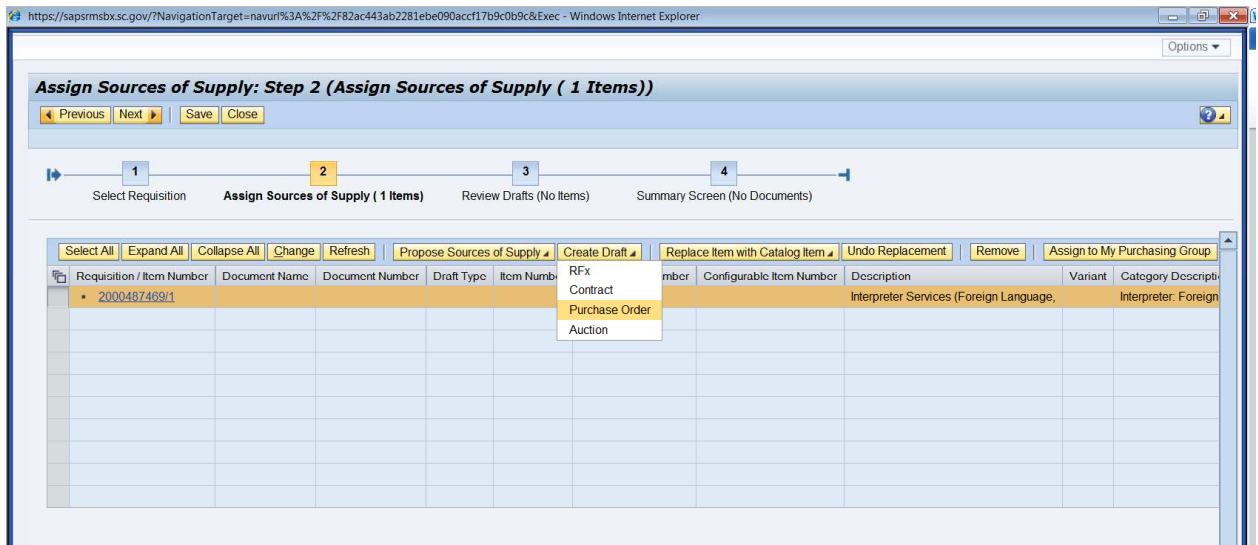
Delivery Date Range: In 90 Days Include Locked Items:

Delivery Date: 08/27/2013 Search for Requisitions [Field]

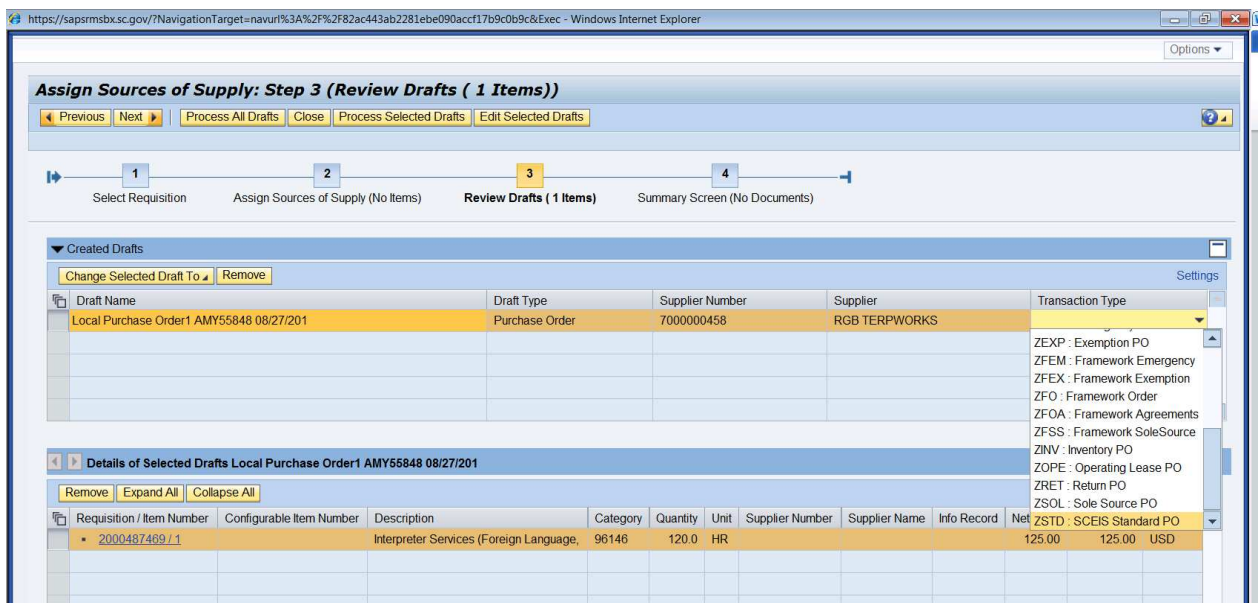
[Search]

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Ma
2000487461/2	CONTROLLER,TRAFFIC,2070L_MASTER	55088		10	EA	RFC USER	08/30/2013	7000026819	WALKER BROTHERS INC			
2000487466/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487467/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487468/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487469/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487470/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487471/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487472/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487473/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487474/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			

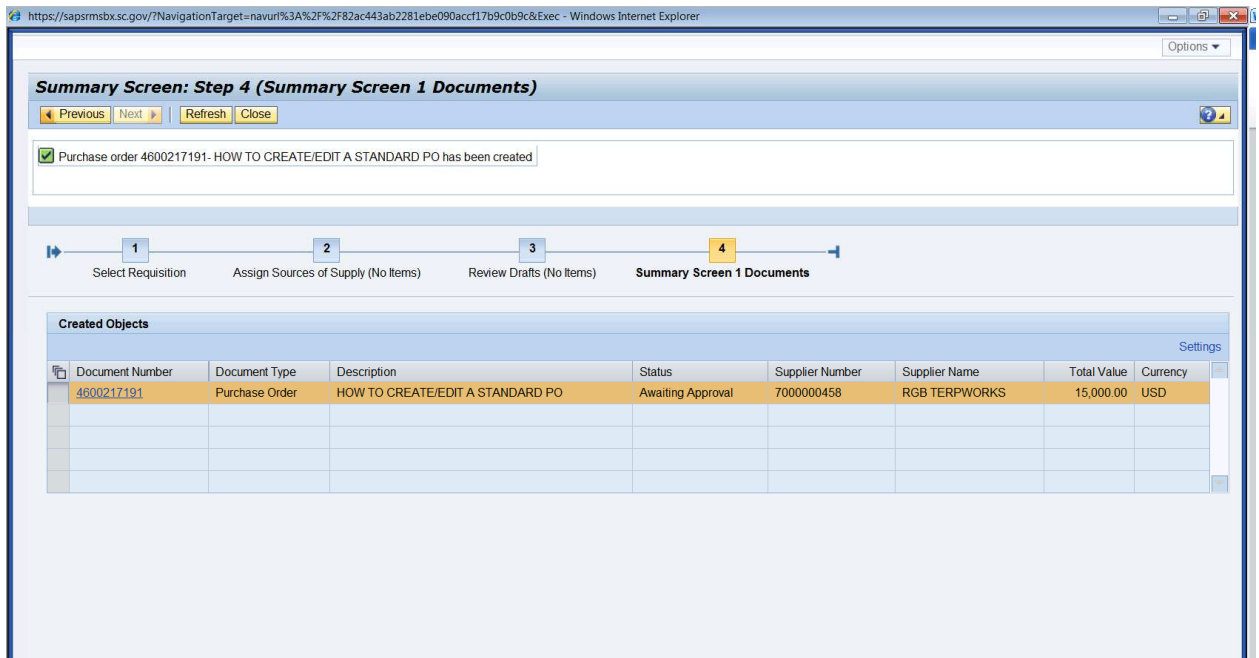
9. Click **Create Draft**. Using the drop-down, select **Purchase Order** (this automatically takes you to step 3).



10. In **Draft Name** field, change the name to PO Exercise 1. In the **Transaction Type** field, use the drop down menu to select **ZSTD SCEIS Standard PO**. Click **Process Selected Drafts**. NOTE: Once the Transaction Type has been selected it cannot be changed. If the PO type needs to be changed after creation, the PO must be deleted and a new PO issued.



11. You have just created a Standard PO. The PO number will appear at the top of the screen. Click **Refresh** to update your Status to **Ordered**.



State Standard PO Created: _____

12. Click **Close**.

