



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Creating Auto Source Requisitions by Origin

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Creating Auto Source Requisitions by Origin

Important: This is a one-time setup for this origin. After the initial setup, select the **Find an Existing Value** tab to run the **PO Auto Source** for this origin.

Navigation

Dashboard: Purchasing; **Tile:** Purchase Orders, Stage/Source Requests, PO Auto Sourcing

1. Select the **Add a New Value** tab.

2. Enter a new RUN CONTROL ID (without spaces).

3. Select **Add**.
The *Objectives* page (tab) displays.

4. Select the APPROVED REQUISITIONS checkbox.

5. Enter the BUYER ID.

6. Select the **Options** tab.

7. Uncheck ITEM ID REQUIRED in the *Requisition Selection Criteria* section.

8. Enter a BUSINESS UNIT in the *Requisition Selection Criteria* section.

9. Enter ORIGIN in the *Requisition Selection Criteria* section.

Note: This process selects only approved and budget-checked requisitions from this ORIGIN. Requisition lines must include a SUPPLIER to be sourced by **PO Auto Source**.

10. Complete the *Purchase Order Options* section, as needed.

Note: The values entered for the PURCHASE ORDER DATE and PURCHASE ORDER REFERENCE appear on every PO created when **Run** is selected.

11. Select the arrow to expand the *Additional Processing Options* section.

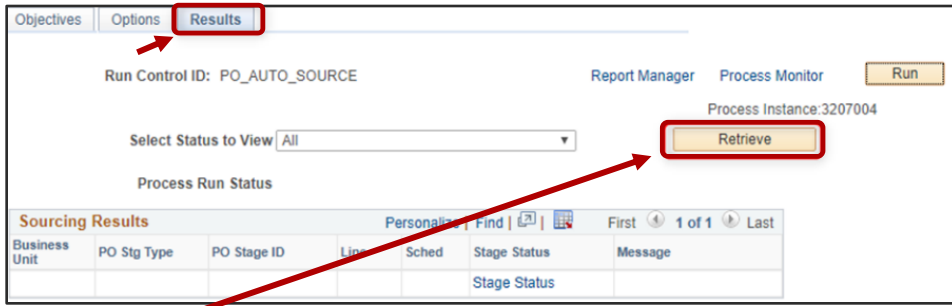
12. Check the boxes for the processes that should run automatically for the POs created by **PO Auto Source**.

13. Select **Run**.

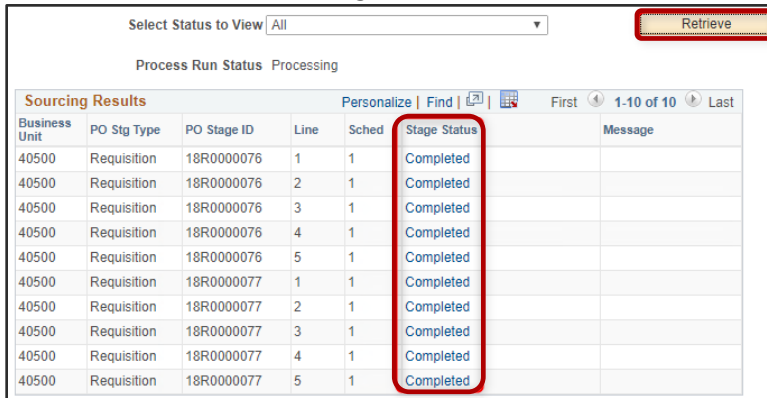
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Automatic Purchasing Sourcing	PO_AUTO_SRC	Application Engine	Web	TXT	Distribution

14. Select **OK**.

15. Select the **Results** tab.



16. Select **Retrieve** to see the *Stage Status*.



Note: Select **Retrieve** periodically (as frequent as every 15 seconds) to check if the process is finished, indicated by *Completed* as the stage status.

Searching for New PO Numbers

The new PO numbers do not automatically display. There are two ways to search for the new PO numbers:

Sourcing Workbench

Navigation

Dashboard: Purchasing; **Tile:** Purchase Order, Stage/Source Requests, Sourcing Workbench

1. Enter all *Search Criteria* fields with known values.
2. Select **Search**.

Instance	*Stg Status	Unit	Buyer	Supplier ID	Loc	Item ID	Description	Requisition ID	Purchase Order ID
3207026	Completed	00		1010515202	007	Item	Helium, Analytical Purity 99.9	18R0000076	18P0000084
3207026	Completed	00		1010515202	007	Item	Cylinder Rental	18R0000076	18P0000084
3207026	Completed	00		1010515202	007	Item	Cylinder Rental	18R0000076	18P0000084
3207026	Completed	00		1010515202	007	Item	Helium, Analytical Purity 99.9	18R0000076	18P0000084
3207026	Completed	00		1010515202	007	Item	Cylinder Rental	18R0000076	18P0000084

Purchase Order

Navigation

Dashboard: Purchasing; **Tile:** Purchase Order, Add/Update POs, Find Existing Value

1. Enter all *Search Criteria* fields with known values.
(Leave fields blank for a list of all values.)
2. Select **Search**.

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name
00	18P0000084	04/25/2018	Dispatched	CRESTLINE SPEC	15202	CRESTLIN

Revision History

Date	Description of Change	Changed By
Feb. 9, 2026	Initial release.	J. Goodman