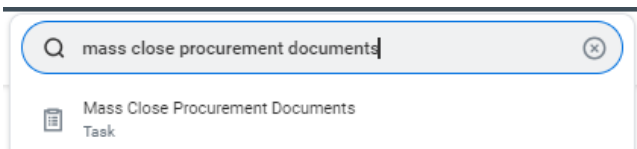


# Procurement: Mass Close Procurement Documents

|                         |                                                                                                          |
|-------------------------|----------------------------------------------------------------------------------------------------------|
| <b>Audience / Role</b>  | Buyer                                                                                                    |
| <b>Description</b>      | This job aid provides instructions to mass close procurement documents from further action.              |
| <b>Before You Start</b> | Have Requisitions, Purchase Orders, Supplier Contracts, and/or Receipts which require to be mass closed. |

## Mass Close Procurement Documents

|          |                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b> | <p>In the Search bar, enter <b>Mass Close Procurement Documents</b>. In the search results, select the <b>Mass Close Procurement Documents</b> task.</p>                                                                                                                                                                                                     |
| <b>2</b> | <p>Under <b>Mass Close Procurement Documents</b>, enter the following into the fields:</p> <ul style="list-style-type: none"> <li>• <b>Request Name</b> – enter name for mass close request.</li> <li>• <b>Company or Company Hierarchy</b> – select Kern County.</li> <li>• <b>Procurement Document Type</b> – select Purchase Order, Requisition, or Supplier Contract. Based on this selection the remaining sections populate.</li> </ul> |
| <b>3</b> | <p>Under the <b>Selection Criteria</b>, update the corresponding fields based on the <b>Procurement Document Type</b>.</p> <p>Select <b>OK</b>.</p>                                                                                                                                                                                                                                                                                           |
| <b>4</b> | <p>Under <b>Select Documents for Mass Close</b>, in the Procurement Documents list, select the checkbox for the documents to mass close. To select all documents in the list, select the checkbox in the header of the table.</p>                                                                                                                                                                                                             |
| <b>5</b> | <p>Select <b>Submit</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                  |

## What Happens Next?

- This mass close procurement documents request routes for review and approval as listed below:
  - Review by Buyer for Requisitions and POs
  - Review by Supplier Contract Specialist for Supplier Contracts
- The process is confirmed, and the documents are closed.



# Procurement: Mass Close Procurement Documents



## Related Reports

- Find Procurement Mass Close Requests

## Related Job Aids

- Create Requisition
- Create Purchase Order
- Create Supplier Contract