



Strategic Sourcing Copy From Delimited (Excel) file Quick Reference Guide

Use this check list to copy an excel spreadsheet into a sourcing event. **For more in depth detail refer to your training documentation.**

Step	Description	Comments
1.	Create an excel file for your sourcing line items.	You must use the format defined in your training guide.
2.	Save the file as a tab delimited file	From the file Save As Type, select the .txt that is tab delimited.
3.	In your sourcing event, use the Copy From box	Select Delimited File
4.	Click on Go	
5.	Select Criteria	Defaults to Append, you can change to override. Use Override when you have line items already entered that you want to replace
6.	Click Select File	
7.	Click Browse	Select the .txt file that you created
8.	Click Open	
9.	Click Upload	
10.	Under Copy Criteria check the appropriate boxes	
11.	File Includes Header Row	Check if your excel spreadsheet has a header row
12.	Delimiter Type	Select Tab
13.	Consolidate Identical Items	Select if you want eliminate duplicate rows, the quantities will be combined
14.	Error Handling Options	Defaults to Ignore Errors – you can select Cancel Import or Exclude Errors
15.	Display Import Error Message	Check this box, When errors are encountered, they will be displayed. You can then research and correct the errors.
16.	Default Criteria	
17.	UOM	Use if your spreadsheet does not have the UOM indicated
18.	Category	Use if your spreadsheet does not have the Category
19.	Quantity	Use if your spreadsheet does not have the Quantity
20.	Click Ok	Validate that your lines are now populated on the Event.
21.	Complete the Event	Use the Quick Reference Guide for Entering an event
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