SWIFT
Statewide Integrated Financial Tools

QUICK REFERENCE GUIDE

Use Dashboards to Manage Purchases

October 31, 2015

Use Dashboards to Manage Purchases

Dashboards are an easy, convenient way to see a variety of purchasing data on your SWIFT home page. This reference guide provides an overview of dashboard options that are typically available for purchasing staff. It also illustrates ways to customize the content and layout of your personal dashboard.

Overview of Purchasing Dashboard Options

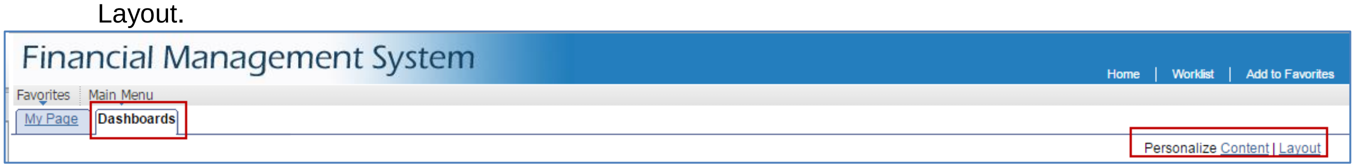
Security Access
The dashboards you are able to access depend on your security access. Currently, only users with buyer authority are able to access the purchasing dashboards. These roles are:

- M_FS_EPRO_BUYER
- M_FS_PO_BUYER
- M_FS_PO_CONTRACT_ENCUMB
- M_FS_PO_AMS_CENTRAL

To request security access, submit a completed Request for Access to SWIFT Statewide Systems form to your agency security administrator: http://www.mn.gov/mmb/accounting/swift/security/security-forms.jsp

Dashboards are available on SWIFT's Home Page.

- Click on the **Dashboards** tab.
- Scroll to the right and click on **Personalize** link. There are two options to customize: Content and Layout.



Customize the Content on your Personal Dashboard

On the **Personalize Content: Dashboards** page, view the reporting options available to you. These reports are called pagelets. Typically the **Supply Chain** pagelets are displayed for staff with purchasing roles.

- Click the checkbox next to the pagelet(s) you would like displayed on your dashboard.
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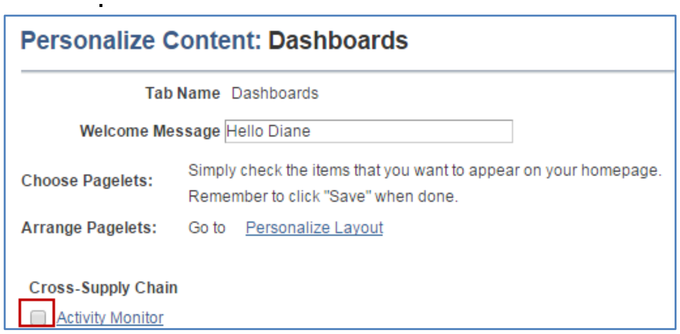
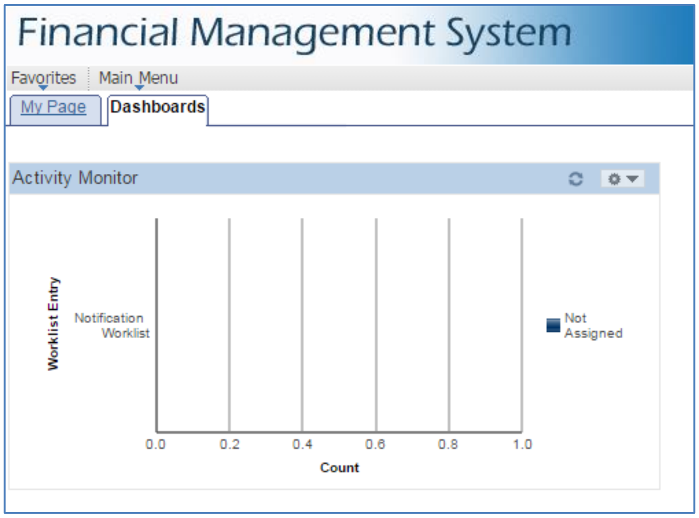


Cross-Supply Chain Pagelets

Cross-Supply Chain Pagelet Name	Usage	View By
Activity Monitor	Displays worklist entries assigned to the buyer or manager.	Buyer or Manager
Dispatched Purchase Orders	Displays a list of recently dispatched purchase orders.	Buyer
Live Sourcing Events	Displays a list of recent sourcing event activity.	Buyer
Manager PO Contract Spend	Displays purchase order contract spend for all buyers that report to a manager.	Manager
Manager PO Spend by PO Date	Displays total purchase order spend by purchase order date for all buyers that report to a manager.	Manager
Manager Spend by Category	Displays all historical spend and future purchases for all buyers that report to a manager by item category. Summarizes and displays spend for all buyers that report to a manager by item category.	Manager
Manager Spend by Vendor	Displays historical spend and future purchases by vendor. Summarizes and displays spend for all buyers that report to a manager for all vendors.	Manager
Manager Total Schedule Spend	Displays total schedule spend for all buyers that report to a manager.	Manager
Overdue Purchase Orders	Summarizes purchase order schedule amounts where the due date is prior to today's date and the schedule has remaining quantity to be received. You can view and analyze data by Business Unit, Vendor, Category, Buyer, Ship To and Item. It retrieves data via query against real-time transactions.	Buyer
PO Acknowledgement Status	Displays purchase orders that do not yet have a corresponding acknowledgement from the vendor, or those purchase orders that have acknowledgements and are awaiting review.	Buyer
PO Contract Spend by Period	Displays the percentage of purchase order amounts that originated from a contract by period.	Buyer
Requisitions to be Sourced	Displays approved requisitions that have not yet been sourced to a purchase order.	Buyer
Spend by Category	Displays historical spend and future purchases for the buyer by item category. Summarizes and displays spend for the buyer for all categories.	Buyer
Spend by Vendor	Displays historical spend and future purchases by vendor. Summarizes and displays spend for the buyer for all vendors.	Buyer
Total PO Spend by PO Date	Displays the total purchase order monetary amount (spend) by purchase order date assigned to the specific buyer. Amounts are bucketed by purchase order date and total purchase order amount.	Buyer
Total Schedule Spend by Period	Displays the total schedule monetary amount (spend) for purchase orders assigned to the specific buyer. Amounts are bucketed by period, using the scheduled due date on the purchase order.	Buyer

- When you are done selecting pagelets, scroll to the bottom of the page. Click the **Save** button.

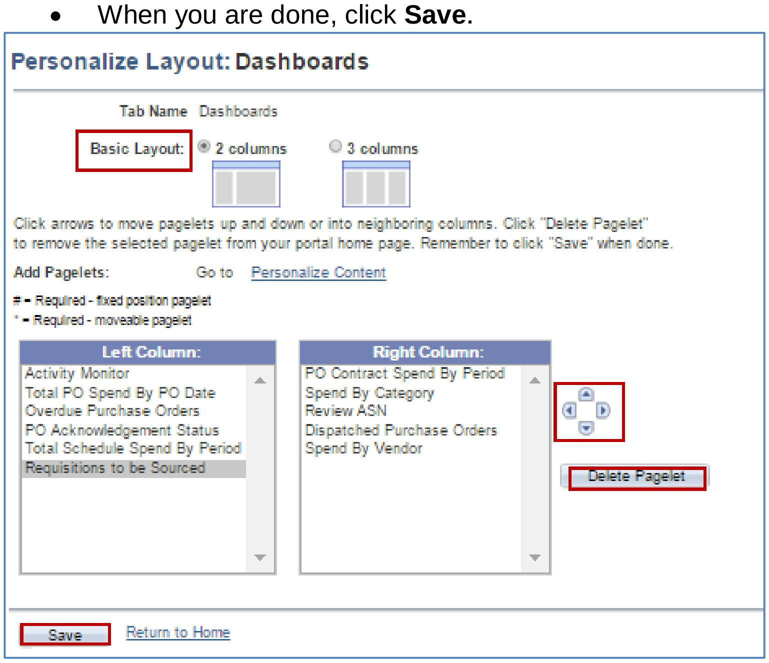
SWIFT returns to your **Dashboard** tab. It now displays any pagelets you selected.



Customize the Layout on your Personal Dashboard

On the **Personalize Layout: Dashboards** page, view the layout options. Layout options include: viewing in two or three columns and selecting the order in which the pagelets appear.

- Step 1: Select the **Basic Layout** of 2 or 3 columns.
- Step 2: **Add Pagelets**.
- To change the order of pagelets, click on a pagelet. Once highlighted, use the arrows to right of the column list to move it on the list. You can move it up or down. You can move it from one column to another.
- You can also click the **Delete Pagelet** button to remove it from your list.
- When you are done, click **Save**.



Your homepage will now display the new customized layout.