

QUICK REFERENCE GUIDE

Print a Purchase Order

October 31, 2015

Print a Purchase Order

This guide covers how buyers can print a purchase order using these methods.

- Dispatch a Purchase Order and Use the Report Manager (authorized version)
- Enter a Purchase Order and Print It (unauthorized version)
- Use the Purchase Order Inquiry to Print the Purchase Order (unauthorized version)
- Use the Print POs Page to Print a Purchase Order after it was Dispatched (authorized version).

NOTE: Buyers can enter their email during the dispatch process. SWIFT will email the authorized version to them. An authorized version of a purchase order is viewed as an official document. An unauthorized version is for internal use only. It is not meant to be sent to a vendor.

Dispatch a Purchase Order and Use the Report Manager to Print Purchase Orders

Buyers must have the approved SWIFT roles to use the **Report Manager** to print purchase orders. Certain purchase orders are set up to not print authorized versions. They include blanket purchase orders and encumbering orders. As soon as you dispatch a purchase order, go to the **Report Manager** to print an authorized version of it.

1. **Navigation Links:** Reporting Tools, Report Manager.
2. Select the **Administration** tab.
 - In the *Type* field, select "BI Publisher".
 - In the *Last* field, enter "30" or another number that best fits your needs. The *Last Number of Days* field allows you to search for recent purchase orders.
 - Click the **Refresh** button to display the results.
 - On the *Report List* section, recent purchase orders are displayed. Select the correct purchase order to print (e.g., "PO_DISPATCH - PO_DISPATCH.pdf").

The screenshot shows the SWIFT Report Manager interface. At the top, there are tabs for 'List', 'Explorer', 'Administration' (which is selected and highlighted with a red box), and 'Archives'. Below the tabs is a 'View Reports For' section with the following fields: 'User ID: FISKA01', 'Type: BI Publisher' (highlighted with a red box), 'Last: 30' (highlighted with a red box), 'Days' (dropdown), and a 'Refresh' button (highlighted with a red box). Below this is a 'Report List' section with a table of reports. The table has columns for 'Select', 'Report ID', 'Prce Instance', 'Description', 'Request Date/Time', 'Format', 'Status', and 'Details'. Two reports are listed, with the first one highlighted by a red box:

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1712503	1907601	PO_DISPATCH - PO_DISPATCH.pdf	10/14/2015 10:13:40AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1712362	1907423	PO_DISPATCH - PO_DISPATCH.pdf	10/01/2015 3:32:43PM	Acrobat (*.pdf)	Posted	Details

- A PDF version of the purchase order will be displayed. This authorized-version contains the name of the person who dispatched the purchase order. .

Issuer certifies that funds have been encumbered and appropriate approvals have been obtained.	Issued By: <i>Tina Skala</i>
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- Select **File - Print** from the menu to print the purchase order using your local printer.
- The purchase order can also be used using the **File – Save As** functionality.

Enter a Purchase Order and Print It

After you enter, save, budget-check and dispatch a purchase order, you print an unauthorized version of it.

1. **Navigation:** Purchasing, Purchase Orders, Add/Update POs
 - Enter the *Business Unit*. Click **Add**.
2. On the **Maintain Purchase Order** page, enter all of the required items to set up a purchase order.

There are two ways to be able to print an unauthorized purchase order on this page.

- Option 1: On the *Dispatch Methods* field of the Header, change the *Dispatch Method* to “Print”. Click **Save**. The buyer must be connected to a printer for this option to work.

Header information including PO Date (08/18/2015), Vendor (SAND CREEK GROUP LTD THE), and Dispatch Method (Print).

- Option 2: Below the Lines, click on **View Printable Version**.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		EAP Seminar	1.0000	EA	8610000	900.00000	900.00	Approved

[View Printable Version](#)

- A PDF version of the purchase order will be displayed. It will be an unauthorized version.

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Use the Purchase Order Inquiry to Print a Purchase Order

Any user with purchase order inquiry roles can print an unauthorized version of the purchase order. You can print it directly from the purchase order page.

1. **Navigation:** Purchasing, Purchase Orders, Add/Update POs,
 - On the **Find an Existing Value** tab, enter the *Business Unit* and the *PO ID*. Click **Search**.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: = G1001

PO ID: begins with

Origin: begins with

Purchase Order Date: =

PO Status: =

Short Vendor Name: begins with

Vendor ID: begins with

Vendor Name: begins with

Buyer: begins with

Buyer Name: begins with

PO Type: =

Purchase Order Reference: begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

2. On the **Purchase Order**, click on the **View Printable Version**. It is on the lower left corner below the Lines section.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merc
1		FY 2016 Community Bank - Depository Services	1.0000	LO	84111700	44,798.55000	4
2		FY 2016 - Amount refunded by W.F. per inv# 15070056765	1.0000	LO	84111700	5,150.30000	

[View Printable Version](#)

3. You will receive a message that says “Do you want to print the purchase order with distribution details?”.
 - If you select **Yes**, it will print the funding information on the purchase order.
 - If you select **No**, it will print the purchase order without the funding information.
4. A new window displays the unauthorized PDF version of the purchase order.

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Unauthorized

Use the Print POs Page to Print a Purchase Order after it was Dispatched

If you did not print the purchase order after it was dispatched, use **Print POs** from the **Review PO Information** page to access it and print it.

1. **Enter the Run Control ID to access the Print POs page.**

- **Navigation Links:** Purchasing, Purchase Order, Review PO Information, Print PO.
- On the **Purchase Order Print** page, create or enter an existing *Run Control ID*.
 - To create a *Run Control ID*, click on the **Add a New Value** tab. Enter a name that will help you remember it (e.g., Report, Print PO, Your Initials). Click **Add**.

- OR, enter an existing *Run Control ID* on the **Find an Existing Value** tab. Click **Search**.

2. On the **Print POs** page,

- Enter the *Business Unit* in both fields. Enter the *PO ID*.
- Check the *Print PO Item Description* box on the Miscellaneous Options section.
- Click **Save**. Click **Run**.

3. On the **Process Scheduler Request** page, click **OK**.

Process Scheduler Request

User ID: 01087463 Run Control ID: Report

Server Name: Run Date: 10/15/2015

Recurrence: Run Time: 1:05:51PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Print Purchase Orders	M_POXMLP	PSJob	(None) ▼	(None) ▼	Distribution

4. The **Print POs** page is displayed. Click on the **Report Manager** link.

Print POs

Run Control ID: Report

Language: English ▼ Specified Language Recipient's Language Process Instance: 15772996

Report Request Parameters

Business Unit: G1001 To: G1001

PO ID: 3000003215 [Select Purchase Order](#)

Statuses to Include

Approved Dispatched Canceled

Open Pending Completed

Miscellaneous Options

5. On the **Report Manager**, select the **Administration** tab.

- Find the most recent purchase order. You can see it on the *Request Date/Time* field. The *Status* field should be "Posted".
- In the *Description* field, click the hyperlink of the purchase order. It will be "POXMLP PRINT-BOXMLP PRINT.pdf".

List Explorer **Administration** Archives

View Reports For

User ID: 01087463 Type: ▼ Last 1 Days

Status: ▼ Folder: ▼ Instance: to:

Report List Personalize | Find | View All | First 1 of 1 Last

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	14348080	15772997	POXMLP_PRINT-POXMLP_PRINT.pdf	10/15/2015 1:07:41PM	Acrobat (*.pdf)	Posted	Details

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