

QUICK REFERENCE GUIDE

Category Codes Overview

October 31, 2015

Category Codes Overview

Category codes group similar purchases together for analysis. The Category Code field in SWIFT is required on all purchasing documents. It must accurately represent the type of purchase. SWIFT has an easy-to-use search tool to help locate the correct Category Code for a purchase. This tool is located in the Minnesota Data Center (MDC) area of SWIFT. This reference guide describes how to access and use the Category Code search tool. It also provides a breakdown of how the Category Codes are organized. This organization helps you to find the correct code to describe a purchase.

Access and Use the Category Code Search

1. Access the Category Code Search

- **Navigation:** Items, MDC Item Maintenance, MDC Searches, MDC Search Item Categories

2. Enter a Search Value in one or more of the Flex Fields.

- Each of the three *Flex Fields* can be populated with a value to search by. Common search values are *Keyword* and/or *Long Description*. *Keywords* were added to SWIFT's Category Codes to make it easier to locate the correct code. Results are more accurate using the *Long Description* field.
- Users can search by just one criteria or up to three. Use a "contains" search when prompted for best results.
- Use the **Clear Field** icon to change your search values.
- Click the **Search** button.

The screenshot shows the 'Item Category Search' interface. At the top, there is a 'Filter' section with three dropdown menus for 'SetID', 'Long Description', and 'FLEX FIELD'. The 'Long Description' dropdown is selected, and the search criteria is set to 'Contains' with the value 'FISH'. A 'Search' button is located below the filter section. Below the search bar, there is a 'Search Results' table with columns for SetID, Market Code, Category Cd, Category ID, Eff Date, Long Description, and Keyword. Two results are displayed:

SetID	Market Code	Category Cd	Category ID	Eff Date	Long Description	Keyword
SHARE	UN/SPSC	70131706	00967	07/12/2011	Watershed management > Land and soil management > Land and soil preparation and management and protection > Farming and Fishing and Forestry and Wildlife Contracting Services	PT/P/T SERVICES WATERSHED MANAGEMENT PREPARATION PLANNING CONSTRUCTION SOIL RUNOFF
SHARE	UN/SPSC	70171707	00031	07/12/2011	Water well maintenance or management services > Irrigation > Water resources development and oversight > Farming and Fishing and Forestry and Wildlife Contracting Services	SERVICES WATER WELLS MANAGEMENT MAINTENANCE CONSTRUCTION DEVELOPMENT

NOTE: The search displays 100 rows at a time. Look at the top menu bar to see if there are more rows to view.

SetID	Market Code	Category Cd	Category ID	Eff Date	Long Description	Keyword
SHARE	UN/SPSC	70100000	00759	02/16/2015	Fisheries and aquaculture > Farming and Fishing and Forestry and Wildlife Contracting Services	SERVICES FISHING FISHERY FISHERIES HATCHERIES HATCHERY NETTING TRAWLING RESEARCH RESOURCES STORAGE SONAR POND FARMING STOCKING WALLEYE MUSKELLUNGE

3. Use the Results of the Search.

- Click on an individual record to see if it describes the purchase. You can view the Account, tolerances and receiving controls.

Category Definition | Category Definition 2 | Account Restrictions

SetID: SHARE Category ID: 00176 Code: 20110000

Header Find | View All First 1 of 5 Last

*Market Code: UN/SPSC Effective Date: 07/17/2011 Status: Active

*Long Description: Well drilling and operation equipment > Mining and Well Drilling Machinery and Accessories *Short Desc: Well drill

- On the **Search Results** page, you can click on the **Download** icon to download the results in an Excel spreadsheet.

Find | View 100 | [Download Icon] First 1-6 of 6 Last

SetID	Market Code	Category Cd	Category ID	Eff Date
SHARE	UN/SPSC	10101700	00769	02/16/2015

Category Codes in SWIFT

Users can run query **M_CG_GBL_UNSPSC_TAX_STATUS** to see the complete list of active Category Codes.

In general, Category Codes that begin with 1-6 represent a physical good, something you can touch. Codes beginning with 7, 8 and 9 generally represent a service type of procurement.

In a few cases, a Category Code to describe a particular kind of purchase does not exist. For those purchases, there are specific Category Code to use.

- Administrative hearings or judges, use 92101800
- All Grants, regardless of purpose, use 84101501
- Data sharing agreements, use 93151500
- Direct or Indirect costs, use 93151600
- PCard and Fleet Cards, use 84141700