Overview of Changes in EProcurement

September 1, 2019

This overview contains information about changes to the EProcurement (EPro) module with the SWIFT Limited Upgrade, including:

- Updated page layout
- Create and manage templates
- New inventory Document Type of “INV”
- Global Search

Note: There may be some changes to this information since SWIFT Limited Upgrade testing is still in progress. Questions? Contact us at: SWIFT.project@state.mn.us.

Updated Page Layout

The functionality remains the same on the EProcurement module. The interface makes it easier to create new requisitions, manage them using the left menu options, and create and use templates.

- When you create a new requisition, you will enter all your data on the Create Requisitions/Requisition Settings main page.
• Agencies that used the Speedchart functionality will now use Accounting Tags to enter requisitions.
• The new left menu provides an easier way to manage your existing requisitions.

You can use the Manage Requisitions page to find, review and update existing requisitions. And you can access reports such as the Document Status report.

Create and Manage Templates

It is simple to create and manage your templates. When you are creating a new requisition and checking out, you can save it as a template.

After you create a template, you can readily find and reuse it using the EProcurement tile.
New Inventory Document Type

A Document Type of “INV” has been added for Inventory transactions. The “INV” Doc Type is only for those agencies using SWIFT’s Inventory module.

Global Search

The new Global Search may help you find requisitions more quickly.

- Select the Global Search icon in the top bar and enter your search criteria. In the example below, the search is limited to looking for records with a specific Requisition ID.

- Launch the search. Records matching your search criteria display on the Search Results page.

- Select a record in the search results to view more information.

You can view information where you have roles and permissions.