

QUICK REFERENCE GUIDE

November 1, 2019

Use the Requisition Document Status Inquiry

Agencies can use this inquiry to see the status of any procurements documents associated with an individual requisition. Procurement documents include supplier contracts, purchase orders and vouchers.

Requisition Status Values

Status Values	Status Definition
Approved	The agency approved this requisition and it is ready for sourcing. For this status to display at the header level, make sure that all lines of this requisition are in an "Approved" status.
Canceled	The agency enter and saved the requisition but canceled the entire requisition or each requisition line of it.
Complete	SWIFT marks the requisition as complete after the agency dispatches the purchase order, the agency receives the goods and the agency paid the supplier.
Denied	The agency denied the entire requisition or each requisition line in the approval process. For this status to display at the header level, all lines of this requisition must be in the "Denied" status.
Initial	SWIFT does not currently use this feature.
Line Approved	The requisition contains some lines that have been sourced to an approved purchase order.
Open	The agency entered and saved the requisition, but has not submitted it yet. For this status to display at the header level, all lines of this requisition must be in the "Open" status. A requisition in this status may not be sourced to another document, such as an event or Inventory Material Stock Request.
Pending Approval	The agency submitted the requisition and has not completed the approval of it. This header status indicates that all lines of this requisition have the line status of "Pending."
Preview	SWIFT does not currently use this feature.

This guide lists the steps to use the Requisition Document Status Inquiry in the EProcurement module in SWIFT.

Steps to complete

- Step 1: Navigate to the Requisition Document Status Inquiry page
- Step 2: Review an individual requisition to see its associated documents

Steps to use the Requisition Document Status inquiry

Step 1: Navigate to the Document Status Inquiry page

1. Navigate to the **Requisition Document Status Inquiry** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions. Left menu, Document Status. Requisition Document Status Inquiry page appears.

- On the **Requisition Document Status Inquiry** page, enter information in the search criteria fields.
- Then, select **Search**.

Requisition Document Status

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit = [v] R2901 [x] [Q]

Requisition ID begins with [v] []

Requisition Status = [v] []

Requisition Date = [v] [] [!]

Origin begins with [v] [] [Q]

Requester begins with [v] [] [Q]

Description begins with [v] []

Case Sensitive

[Search] [Clear] Basic Search [Save Search Criteria]

2. If you select multiple options, SWIFT displays the **Search Results** section. It contains requisitions that match your search criteria. SWIFT will only show the first 300 results. Select the desired *Requisition ID*.

Search Results

Only the first 300 results can be displayed.

View All [1-100 of 300] [v]

Business Unit	Requisition ID	Requisition Status	Requisition Date	Origin	Requester	Description
R2901	1000003102	Open	02/15/2019	A1		Employed ID & Name
R2901	1000003101	Approved	02/11/2019	A12		
R2901	1000003100	Approved	02/11/2019	A12		
R2901	1000003099	Approved	02/08/2019	A12		

Step 2: Review an individual requisition to see its associated documents

SWIFT displays the **Document Status** page of your chosen *Requisition ID*.

1. Confirm that this is the correct requisition to review.
2. On the header, SWIFT shows you which documents are associated with the requisition.

Document Status

Business Unit R2901	Req ID 1000002711
Document Date 07/11/2017	Status Complete
Currency USD	Document Type Requisition
Requester	Merchandise Amt 12,000.00
	Budget Status Valid

3. The **Associated Document** section allows you to get information about each of the documents. Review the individual documents associated with the requisition.

Associated Document

1-4 of 14 View All

Documents Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Document Status Inquiry icon
<div style="border: 1px solid #ccc; padding: 2px;"> Actions Review Supplier Contacts Maintain Supplier </div>		R2901	Strategic Sourcing Event	2000007311	Awarded	07/19/2017			🔍
		R2901	Purchase Order	3000119120	Compl	07/19/2017	0000870815	001	🔍
		R2901	Receipt	0000435229	Moved	08/10/2017	0000870815	001	🔍
		R2901	Receipt	0000437313	Moved	08/24/2017	0000870815	001	🔍

Return to Search Previous in List Next in List

- a. If you select the **Actions** link for a line, SWIFT opens up a new window with links to the **Review Supplier Contacts** or the **Maintain Supplier** search pages. You can get information about the supplier listed on the line.
- b. If you select the *Doc ID* for a line, SWIFT opens up a separate window that brings you to an inquiry page for that document. You can get information about the associated document. Agencies commonly use this option.

Voucher Inquiry

Search Criteria

- Sort Criteria
- Display Currency Criteria
- Late Interest Analysis

Voucher Inquiry Results

1-1 of 1 | View All

Q

Voucher Details | Amounts | More Details | Supplier Details | |>

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	R2901	00452408	9851-16	09/14/2017	0000870815	Postable	<input type="checkbox"/>	Matched	BLOMKEST-002

- c. If you select the **Document Status Inquiry** icon for the line, SWIFT opens up another window to the Document Status Inquiry for that document.

Voucher Document Status

Business Unit: R2901 | Voucher ID: 00452408 | Document Tolerance Status: Valid

Invoice ID: 9851-21 | Invoice Date: 10/05/2017 | Budget Misc Status: Valid

Gross Amount: 2314.00 | USD | Approval Status: Approved | Budget Status: Valid

Supplier ID: 0000870815 | Location: 001 | Document Type: Voucher | Match Status: Matched

Status: Posted

Requisitions(1) | Sourcing Events(1) | Procurement Contracts | Purchase Orders(1) | Service Work Orders | Receipts(1) | Returns | Vouchers | Payments(1)

Show All

Associated Document

1-4 of 5 | View All

Q

Documents | Related Info | |>

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions		R2901	Requisition	1000002711	Complete	07/11/2017		

You have successfully used the Requisition Document Status inquiry.