SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated December 01, 2020

Expedite Catalog Punchout Requisition

After using the EProcurement (EPro) module to create a Catalog Punchout Requisition (CTR) and pre-encumber funds for a purchase order, you can wait for the PO auto-source process to run, which SWIFT automatically runs every two hours. However, if you need to speed up this process, you can expedite the requisition.

This Quick Reference Guide shows how to expedite a CTR, as well as how to run the budget checking process and dispatch the purchase order.

Steps to complete

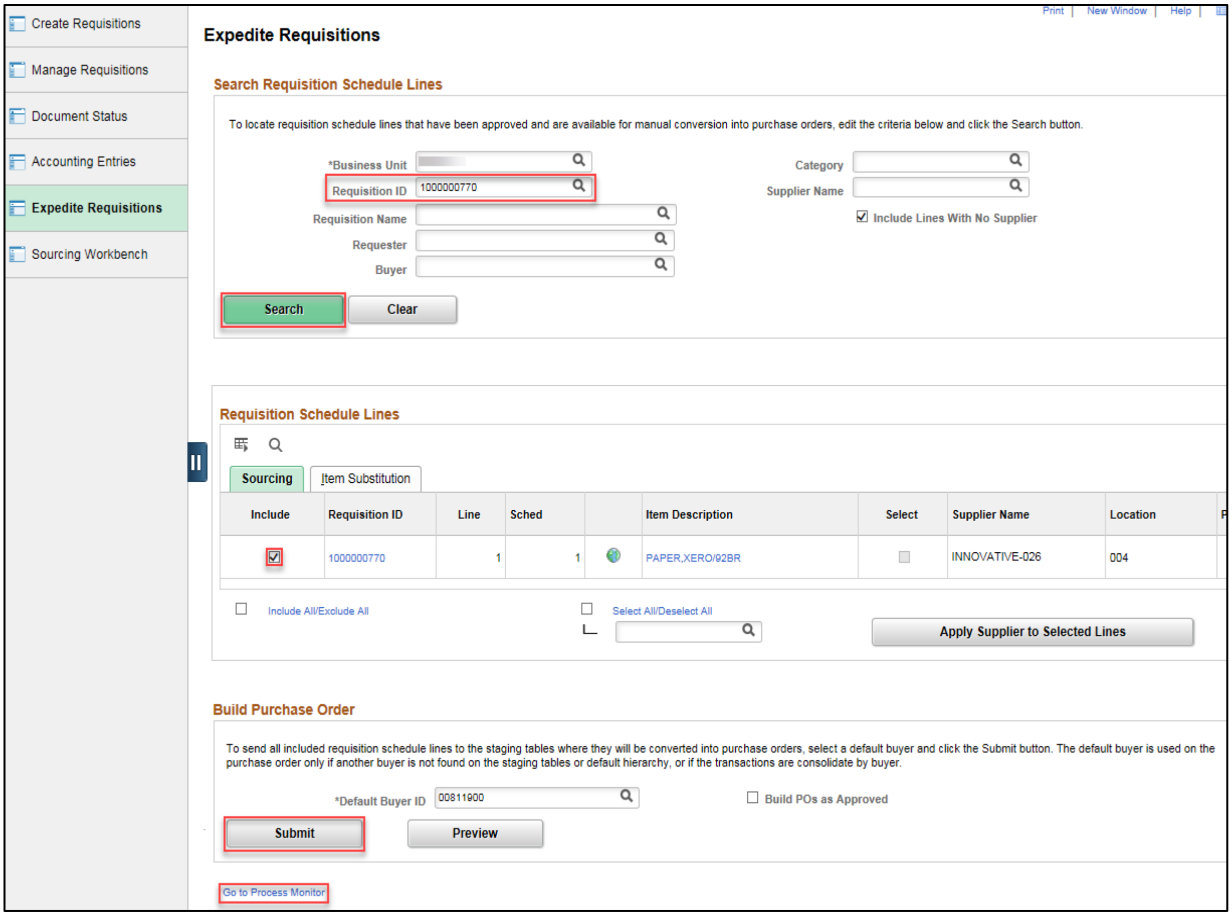
- Step 1: Expedite the requisition.
- Step 2: Look up the purchase order number for the requisition.
- Step 3: Open the purchase order.
- Step 4: Run the budget checking process.
- Step 5: Dispatch the purchase order.

Step 1: Expedite the requisition.

1. Navigate to the *Expedite Requisitions* page.

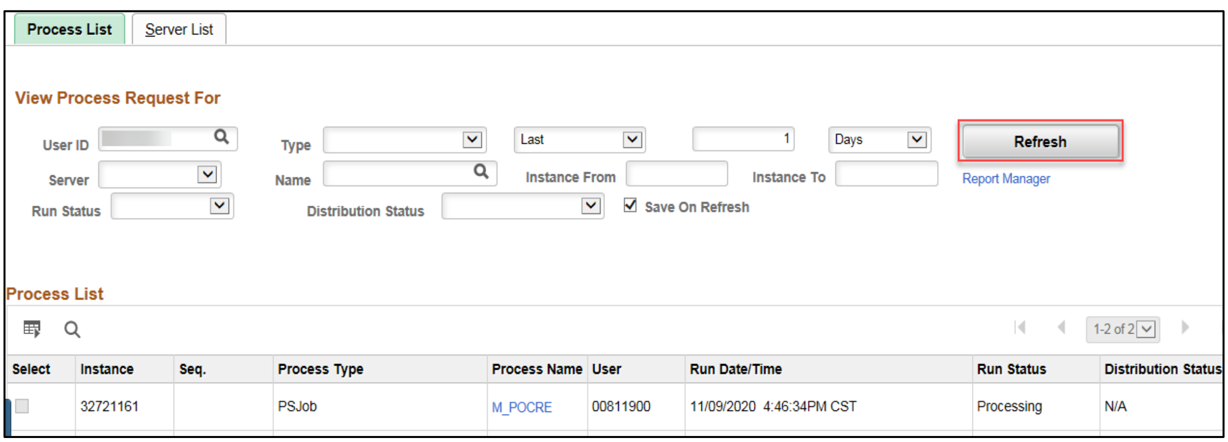
Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions, left-menu, Expedite Requisitions.

2. In the *Business Unit* field, make sure the correct agency number is entered. (To change this field, select the **Look Up Glass** icon to search for and enter the correct value.)
3. In the *Requisition ID* field, enter the requisition number for the CTR.
4. Press the **Search** button.
5. The CTR will appear in the *Requisition Schedule Lines* section below. Make sure the *Sourcing* tab is selected.
6. Check mark the **Include** box for the requisition.
7. Press the **Submit** button.
8. Toward the bottom of the page, select the *Go to Process Monitor* link.

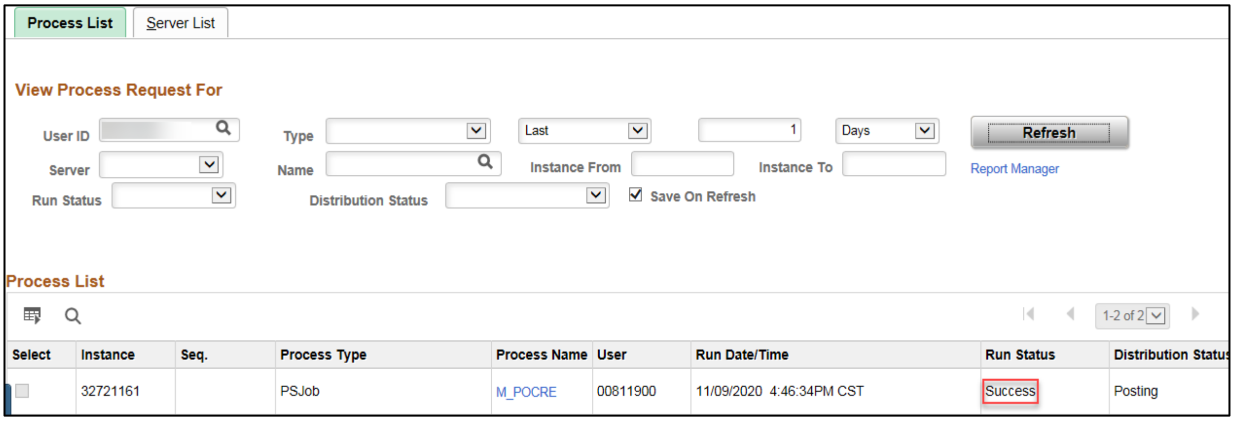


9. The *Process List* will display. Make sure your Employee ID appears in the *User ID* field.

   Then, press the **Refresh** button.



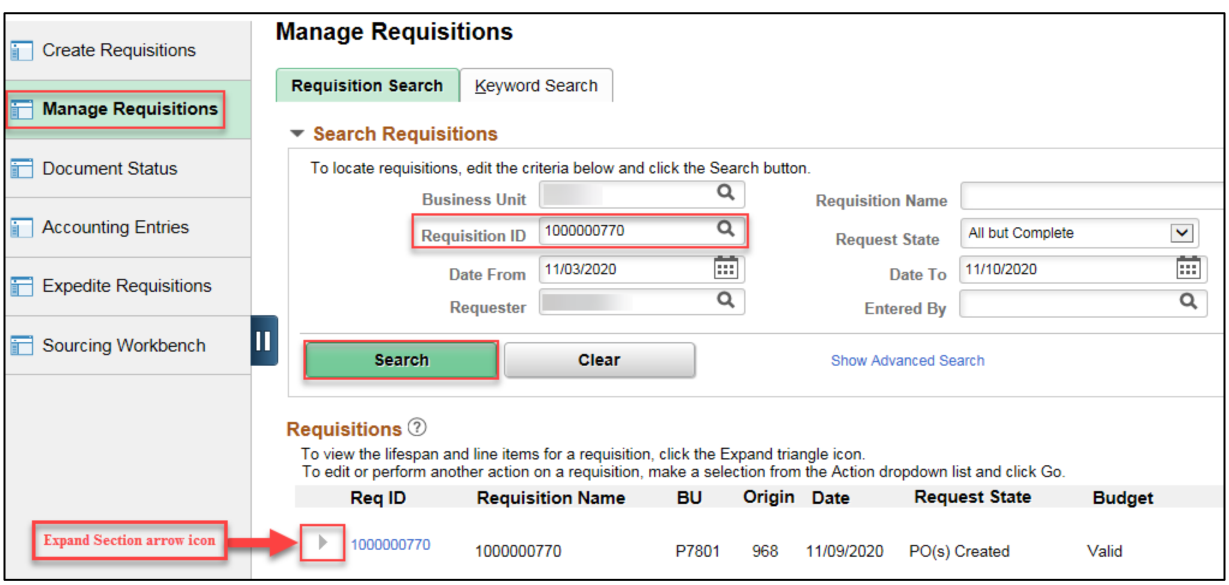
10. Below the *Process List* section, find the *Run Status* of the CTR submitted, and wait for it to say "Success."



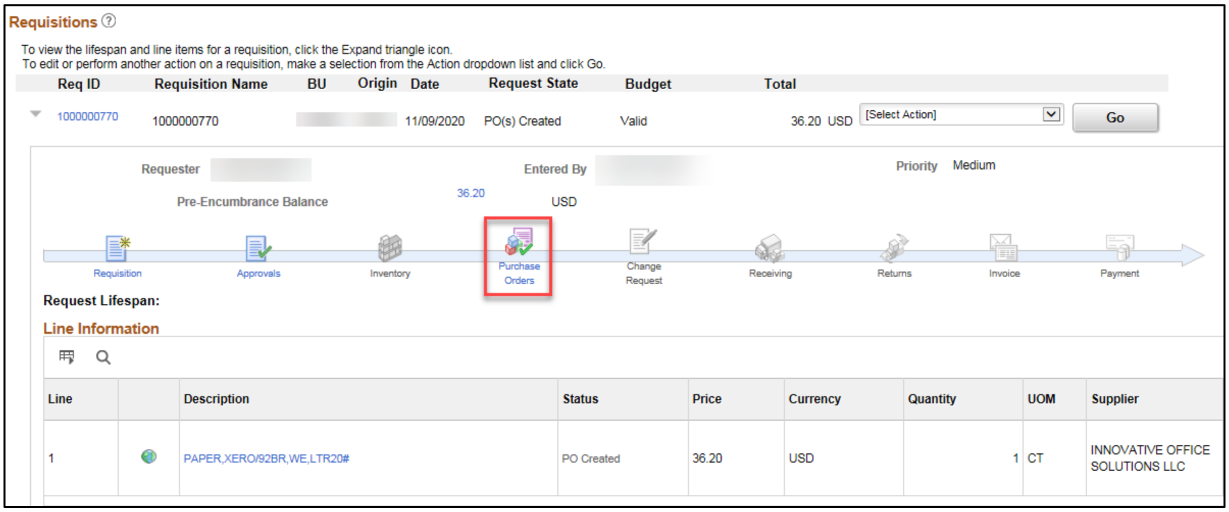
Note: If the *Run Status* still says "Processing," wait a few moments, and then press the **Refresh** button again until the *Run Status* says "Success." Once there is a "Success" Run Status, you can proceed to dispatch the purchase order.

Step 2: Look up the purchase order number for the requisition.

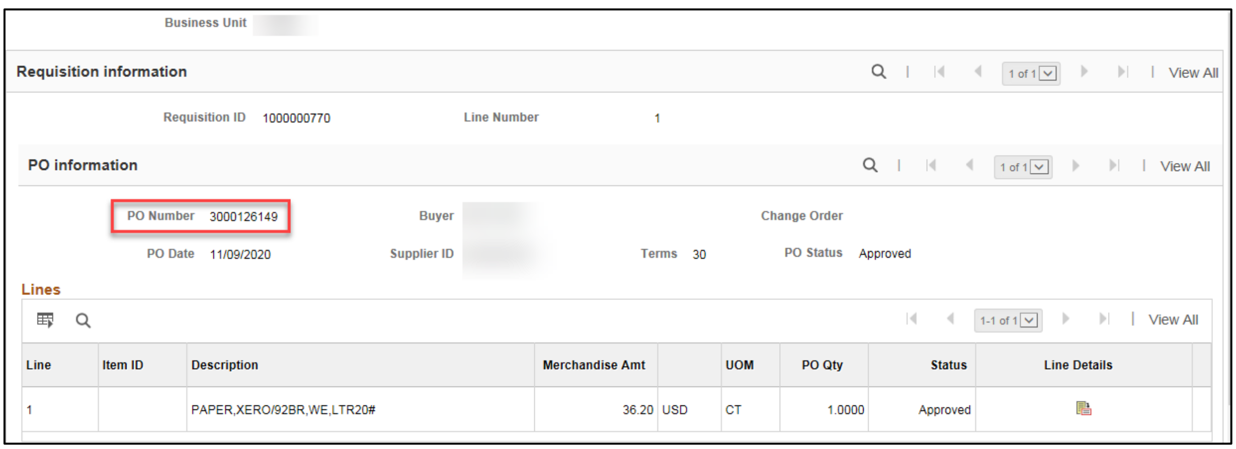
1. From the left-menu, select *Manage Requisitions*.
2. The *Manage Requisitions* page will display. Make sure the *Requisition Search* tab is selected.
3. Enter the identification number for the CTR in the *Requisition ID* field.
4. Press the **Search** button. The requisition will appear in the *Requisitions* section below.
5. Select the **Expand Section** arrow icon for the requisition to see purchase order (PO) information.



6. Select the *Purchase Orders* link.



7. Details for the *Requisition information* and *PO information* will display. In the *PO Number* field, find the identification number for the purchase order. (**Note**: Make sure to remember this number, because you will need the PO number in the next step.)



8. After finding the PO number for the requisition, select the **Home** icon from the top-bar menu to return to *My Homepage* in SWIFT.

Step 3: Open the purchase order.

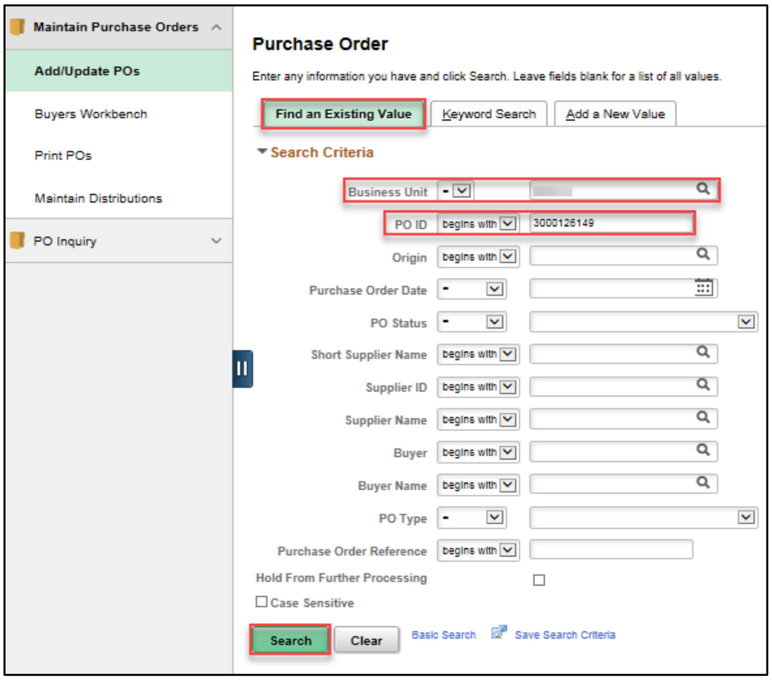
1. Navigate to the *Add/Update POs* page in the Purchase Order module.

Navigation Option	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchase Order. The *Add/Update POs* page will display by default.

2. Select the *Find an Existing Value* tab. Make sure the agency number is in the *Business Unit* field.

3. In the *PO ID* field, enter the identification number for the purchase order.

4. Press the **Search** button.

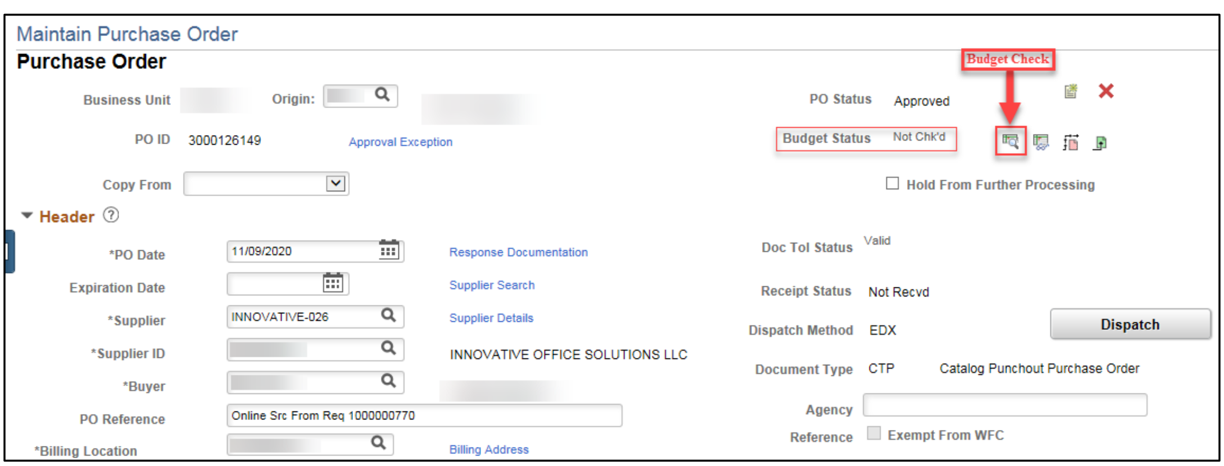


Step 4: Run the budget checking process.

Note: Not all purchase orders will build as approved in SWIFT. Before you can run the budget checking process, the Purchase Order must be in an approved status. For details on how to review and approve purchase orders, as needed, see the [Approve Purchase Orders in SWIFT Quick Reference Guide]().

1. The *Maintain Purchase Order* page will display. Note that *Document Type* field will say CPT, and the *Budget Status* field will say "Not Chk'd" because the budget checking process has not run.

   To run the budget checking process, select the **Budget Check** icon.

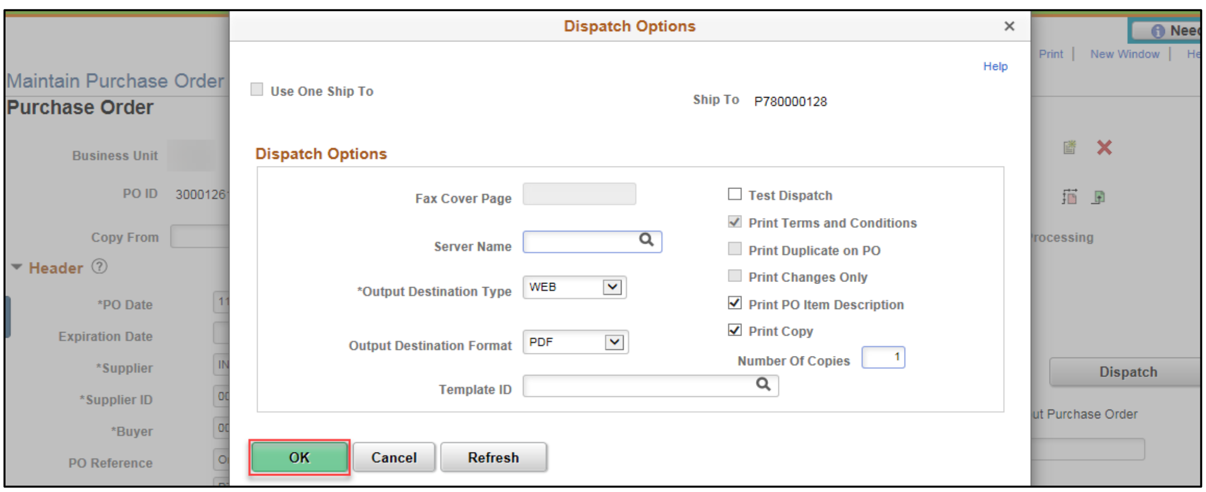


2. Wait a moment for the budget checking process to run. Once the budget checking process has finished running, the *Budget Status* field will say "Valid."

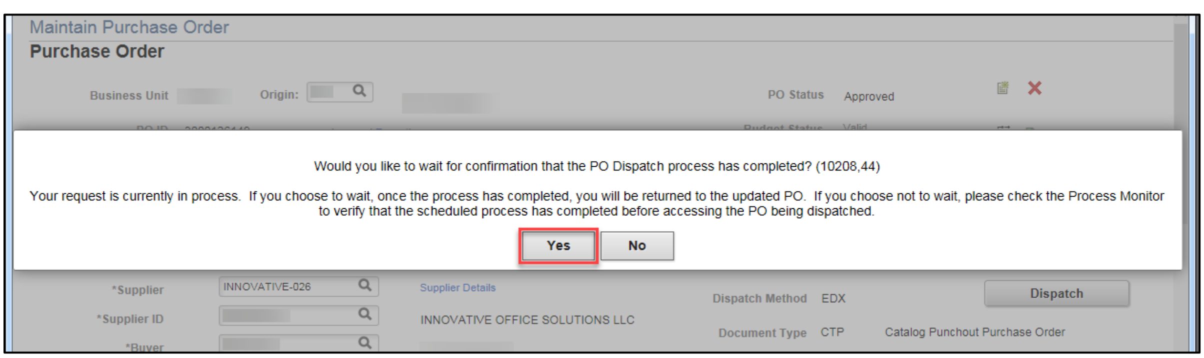
Step 5: Dispatch the purchase order.

1. Once the PO has a "Valid" Budget Status, press the **Dispatch** button.

2. The *Dispatch Options* window will display. Press the **OK** button.



3. A confirmation message for the PO Dispatch will display. Press the **Yes** button to continue.



4. Wait a moment for the PO Dispatch process to complete. Once the PO Dispatch process is completed, the *PO Status* field will say "Dispatched."