

QUICK REFERENCE GUIDE

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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.

- 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.”

The screenshot shows the 'Process List' section of a software interface. At the top, there are tabs for 'Process List' and 'Server List'. Below the tabs is a 'View Process Request For' section with various search filters like 'User ID', 'Server', 'Type', 'Name', 'Instance From', 'Instance To', 'Run Status', and 'Distribution Status'. A 'Refresh' button is also present. Below this is the 'Process List' table:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status
<input type="checkbox"/>	32721161		PSJob	M_POCRE	00811900	11/09/2020 4:46:34PM CST	Success	Posting

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.

The screenshot shows the 'Manage Requisitions' page. On the left is a navigation menu with 'Manage Requisitions' highlighted. The main area has a 'Requisition Search' section with a 'Keyword Search' tab. Below it is a 'Search Requisitions' section with search criteria:

Business Unit: [] Requisition Name: []
 Requisition ID: 1000000770 Request State: All but Complete
 Date From: 11/03/2020 Date To: 11/10/2020
 Requester: [] Entered By: []

Buttons: Search, Clear, Show Advanced Search

Below the search section is a 'Requisitions' table:

Req ID	Requisition Name	BU	Origin	Date	Request State	Budget
1000000770	1000000770	P7801	968	11/09/2020	PO(s) Created	Valid

An 'Expand Section arrow icon' is highlighted with a red box and an arrow pointing to the right-pointing triangle icon in the first row of the table.

6. Select the *Purchase Orders* link.

Requisitions ?
 To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Origin	Date	Request State	Budget	Total	
1000000770	1000000770			11/09/2020	PO(s) Created	Valid	36.20 USD	[Select Action] [Go]

Requester: [Redacted] Entered By: [Redacted] Priority: Medium

Pre-Encumbrance Balance: 36.20 USD

Request Lifespan: Requisition → Approvals → Inventory → **Purchase Orders** → Change Request → Receiving → Returns → Invoice → Payment

Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	PAPER_XERO/92BR,WE,LTR20#	PO Created	36.20	USD		1 CT	INNOVATIVE OFFICE SOLUTIONS LLC

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.)

Business Unit: [Redacted]

Requisition information

Requisition ID: 1000000770 Line Number: 1

PO information

PO Number: **3000126149** Buyer: [Redacted] Change Order: [Redacted]

PO Date: 11/09/2020 Supplier ID: [Redacted] Terms: 30 PO Status: Approved

Lines

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		PAPER_XERO/92BR,WE,LTR20#	36.20 USD	CT	1.0000	Approved	

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 <i>Add/Update POs</i> 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.

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

Find an Existing Value | Keyword Search | Add a New Value

Search Criteria

Business Unit: [Dropdown] [Search]

PO ID: begins with [3000126149] [Search]

Origin: begins with [] [Search]

Purchase Order Date: [Dropdown] [Calendar]

PO Status: [Dropdown] [Dropdown]

Short Supplier Name: begins with [] [Search]

Supplier ID: begins with [] [Search]

Supplier Name: begins with [] [Search]

Buyer: begins with [] [Search]

Buyer Name: begins with [] [Search]

PO Type: [Dropdown] [Dropdown]

Purchase Order Reference: begins with [] [Search]

Hold From Further Processing

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

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.

Maintain Purchase Order
Purchase Order

Business Unit: [] Origin: [] [Search]

PO ID: 3000126149 Approval Exception

Copy From: [Dropdown]

Header

*PO Date: 11/09/2020 [Calendar] Response Documentation

Expiration Date: [Calendar] Supplier Search

*Supplier: INNOVATIVE-026 [Search] Supplier Details

*Supplier ID: [Search] INNOVATIVE OFFICE SOLUTIONS LLC

*Buyer: [Search]

PO Reference: Online Src From Req 1000000770

*Billing Location: [Search] Billing Address

PO Status: Approved

Budget Status: Not Chk'd **Budget Check** [Icon]

Hold From Further Processing

Doc Tol Status: Valid

Receipt Status: Not Recvd

Dispatch Method: EDX **Dispatch**

Document Type: CPT Catalog Punchout Purchase Order

Agency: []

Reference: Exempt From WFC

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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.

The screenshot shows the 'Maintain Purchase Order' interface. The 'Purchase Order' header includes fields for Business Unit, Origin (MCF-Faribault), PO ID (3000126149), and PO Status (Approved). The 'Budget Status' is highlighted in a red box and shows 'Valid'. Below the header, the 'Header' section contains fields for PO Date (11/09/2020), Expiration Date, Supplier (INNOVATIVE-026), Supplier ID, Buyer, and PO Reference. The 'Dispatch Method' is EDX, and the 'Document Type' is CTP (Catalog Punchout Purchase Order). The 'Dispatch' button is highlighted in a red box.

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

The screenshot shows the 'Dispatch Options' dialog box overlaid on the 'Maintain Purchase Order' form. The dialog box has a title bar 'Dispatch Options' and a 'Help' button. It contains several options: 'Use One Ship To' (unchecked), 'Ship To' (P780000128), 'Fax Cover Page' (input field), 'Server Name' (input field with search icon), 'Output Destination Type' (dropdown menu set to 'WEB'), 'Output Destination Format' (dropdown menu set to 'PDF'), 'Template ID' (input field with search icon), 'Test Dispatch' (unchecked), 'Print Terms and Conditions' (checked), 'Print Duplicate on PO' (unchecked), 'Print Changes Only' (unchecked), 'Print PO Item Description' (checked), 'Print Copy' (checked), and 'Number Of Copies' (input field set to '1'). The 'OK' button is highlighted in a red box.

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

The screenshot shows a confirmation message dialog box overlaid on the 'Maintain Purchase Order' form. The message reads: 'Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)'. Below the message, it states: 'Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.' The 'Yes' button is highlighted in a red box.

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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."

The screenshot displays the 'Maintain Purchase Order' interface. The 'Purchase Order' header section is visible, showing the following details:

- Business Unit:** [Redacted]
- Origin:** [Redacted]
- PO ID:** 3000126149
- Approval Exception:** [Link]
- PO Status:** Dispatched (highlighted with a red box)
- Budget Status:** Valid
- Doc Tol Status:** Valid
- Backorder Status:** Not Backordered
- Receipt Status:** Not Recvd
- Dispatch Method:** EDX
- Document Type:** CTP Catalog Punchout Purchase Order
- Agency Reference:** [Redacted]
- Exempt From WFC:**

The 'Header' section is expanded, showing the following details:

- *PO Date:** 11/09/2020
- Expiration Date:** [Redacted]
- *Supplier:** INNOVATIVE-026
- *Supplier ID:** [Redacted]
- *Buyer:** [Redacted]
- PO Reference:** Online Src From Req 1000000770
- *Billing Location:** [Redacted]

Buttons for 'Response Documentation', 'Supplier Search', 'Supplier Details', 'Billing Address', 'Create BackOrder', and 'Dispatch' are visible.