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.

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
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</table>

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

![Process List screenshot]

**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.

![Image of Purchase Orders section]

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.)

![Image of Purchase Order details]

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.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
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<tbody>
<tr>
<td><strong>Navigation Collection</strong></td>
<td>Procurement, Purchasing, Purchase Order. The <strong>Add/Update POs</strong> page will display by default.</td>
</tr>
</tbody>
</table>

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.”