

## QUICK REFERENCE GUIDE

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### Access the Item Balance By All Units Report

The Item Balance By All Units report allows state agencies who use the Item category in SWIFT’s Inventory module to see the item’s balances across all Business Units in SWIFT. Use this report to search for an Item ID from the Inventory module. You can access this report on the Cross Module Functionality tile from the Purchasing and the EProcurement tiles. Currently, few agencies use the Inventory module or an Item ID that carries to the catalog in EProcurement, such as Departments of Health, Employment and Economic Development, and Transportation.

This Quick Reference Guide provides the steps to access the View Item Balances by All Units Report.

#### Step 1: Access the View Item Balances By All Units report

1. Navigate to View Item Balances report either from the Purchasing or EProcurement tile.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchasing, Cross Module Activities. Left menu, Item Balance by All Units.
Navigation Collection	Procurement, EProcurement, Cross Module Activities. Left menu, Item Balance by All Units.

#### Step 2: Enter search criteria and review the results on the report

1. SWIFT displays the Item Balance By All Units page. Enter the Item ID to view its balance across all units in SWIFT. You can press the look up icon to see a list of all items currently in EProcurement. Press **Search**.

The screenshot shows the 'Cross Module Activities' page. At the top, it says 'Welcome to the Administrative Portal' and 'Sign Out'. The left navigation menu includes 'PO Inquiry', 'Contract Workbench', 'Event Workbench', and 'Item Balance by All Units' (which is highlighted with a purple box). The main content area is titled 'Item Balance By All Units' and contains an 'Item ID' search field with a magnifying glass icon, a 'Notify' button, and a 'Search' button (both highlighted with purple boxes).

2. SWIFT opens up the Item Information section. You can see the item by Unit or Business Unit.

**Item Balance By All Units**

Item ID: 1017

Description: Pad, Ruled, 5 x 8

Std UOM: DZ SetID: SHARE

**Business Unit Balances**

Unit	Qty Available	Qty Reserved	In-Transit Qty	Quantity On Hand
CO000	14.0000	0.0000	0.0000	14.0000
WE000	0.0000	0.0000	0.0000	0.0000
Total Qty Available		14.0000	Total Qty In-Transit	0.0000
Total Qty Reserved		0.0000	Total Qty OnHand	14.0000

Notify

### Fields on the Item Balance By All Units page

Field Name	Field Description
<b>Unit</b>	Displays the Business Unit that is using the inventory item.
<b>Qty Available</b>	Displays the quantity available in this business unit to fulfill demand. This is the total quantity on hand less the quantity reserved and allocated.
<b>Qty Reserved</b>	Displays the item quantity that is reserved and allocated for this business unit.
<b>In Transit Qty</b>	Displays the item quantity that is in process.
<b>Quantity on Hand</b>	Displays the entire item quantity for this business unit, including quantity that has been soft-reserved, hard-allocated, available stock, and staged for shipping.

3. If you press the **Notify** button, SWIFT displays the Send Notification page. After you complete it and press the **OK** button, SWIFT will send an email for you about the Inventory item to any desired contacts.

### Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.  
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

**Notification Details** Lookup Recipient

To:

CC:  Delivery Options  
 RichText

BCC:

Priority:

Subject:  ✎

Template:  ▲▼✎

Message:  ✎

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.  
Click Apply to send this notification and remain on this page.