

## QUICK REFERENCE GUIDE

November 1, 2019

### 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 (e.g., Departments of Health, Employment and Economic Development, and Transportation).

Steps to complete

- Step 1: Access the Item Balances By All Units report
- Step 2: Enter search criteria and review the results on the report

### Steps to Access the View Item Balances By All Units report

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

There are two options to access the View Item Balances report: Purchasing tile and EProcurement tile.

1. Navigate to the **View Item Balances** report from the Purchasing tile.

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

2. Navigate to the **View Item Balances** report from the EProcurement tile.

Navigation Options	Navigation Path
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**.

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

Unit	Qty Available	Qty Reserved	In-Transit Qty	Quantity On Hand
ES000	200.0000	0.0000	0.0000	200.0000
Total Qty Available		200.0000	Total Qty In-Transit 0.0000	
Total Qty Reserved		0.0000	Total Qty OnHand 200.0000	

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

Field	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.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

3. If you press the **Notify** button, SWIFT displays the **Send Notification** page. 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](#)  
[Delivery Options](#)

To:

CC:

BCC:

Priority:

Subject:  

Template:   
Priority: %NotificationPriority  
Date Sent: 2016-03-22 

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.

You have successfully accessed the View Item Balances By All Units report.