SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Eprocurement Quick Start Guide

September 1, 2019

This guide introduces you to the EProcurement module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles.

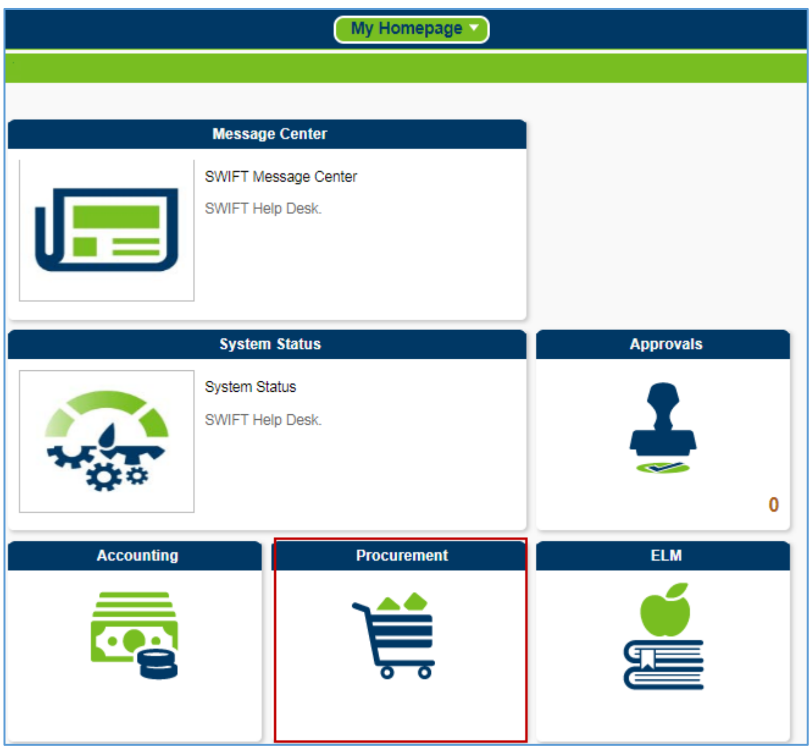
Note: There may be some changes to this information, since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact the SWIFT Help Desk: SWIFT.project@state.mn.us.

The upgraded version of SWIFT organizes the options based on the navigation collection, which is the links to commonly used features for the module. You'll find them on the left menu.

- Step 1: Navigate to the Eprocurement module
- Step 2: View the Requisitions page to see how it is organized

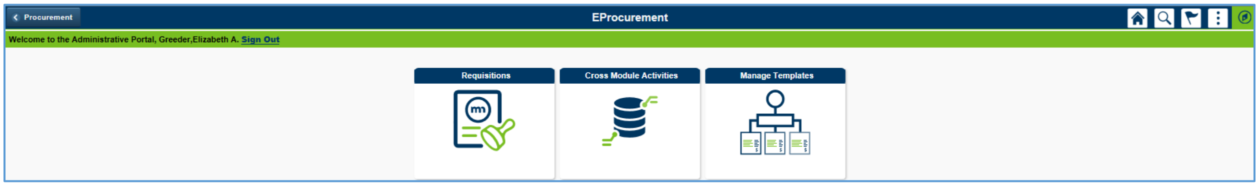
Step 1: Navigate to the Eprocurement module

1. From **My Homepage**, select the **Procurement** tile.



2. On the **Procurement** page, select the **EProcurement** tile.

3. On the **EProcurement** page, review the tiles.



- Review a description of the tiles on the **EProcurement** page.

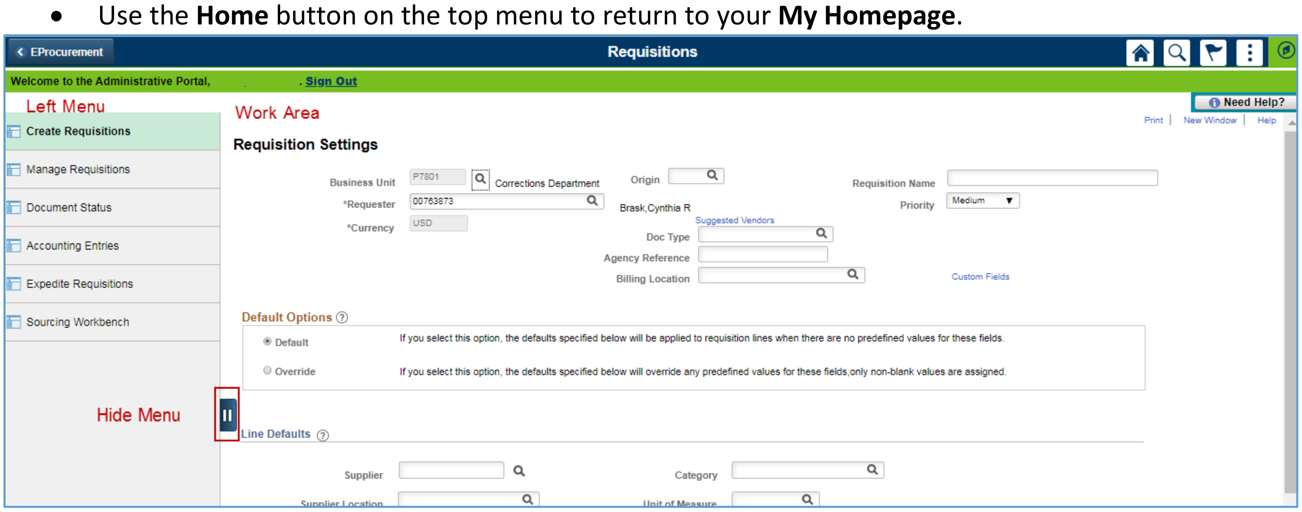
Tiles	Description of Tiles
Requisitions	Use this page to create and manage requisitions.
Cross Module Functionality	Brings you to the PO Inquiry page, which includes links to the Contract Workbench, Process Monitor, Report Manager and Query Viewer pages.
Manage Templates	Agency staff who use the inventory requisitions can use this page to find and manage their inventory templates

- Select the **Requisitions** tile.

Step 2: View the Requisitions page to see how it is organized

1. Review the **Requisitions** page.

- The **left menu** of the page highlights commonly used folders and pages in this module. You can hide this menu as needed.
- The center of the page is the **work area**. This is where you will create and manage purchase orders.
- The **Need Help** button allows you to find Quick References guides for this module. It also brings you to the Query Viewer for running reports.
- Use the back button on the left of the top menu to return to previous pages.
- Use the **Home** button on the top menu to return to your **My Homepage**.



2. Review a description of the left menu options.

Left Menu	Description of Folders and Pages
Requisitions (Requisition Settings)	Use this page to create and process new receipts (Add a New Value tab) and to update and process existing receipts (Find an Existing Value tab).
Manage Requisitions	Use this page to find and edit existing requisitions.
Document Status	Use the Document Status inquiry to find out the status of requisitions.
Accounting Entries	Use the Accounting Entries inquiry to find accounting information for an individual requisition or a group of requisitions using the search criteria. This inquiry allows agencies to gather a large amount of data in one place.