SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

PCard Quick Start Guide

September 1, 2019

PCard Module

Starting in December 2019, there will be changes to SWIFT. While the new version will have a new look and feel, this upgrade will not affect how most processes are completed in SWIFT.

> **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.

This guide will explain the Procurement Card (PCard) module, where you can review, modify, and approve transactions for PCard holders.

- Step 1: Navigate to the PCard module.
- Step 2: Select a folder and page to begin PCard work.
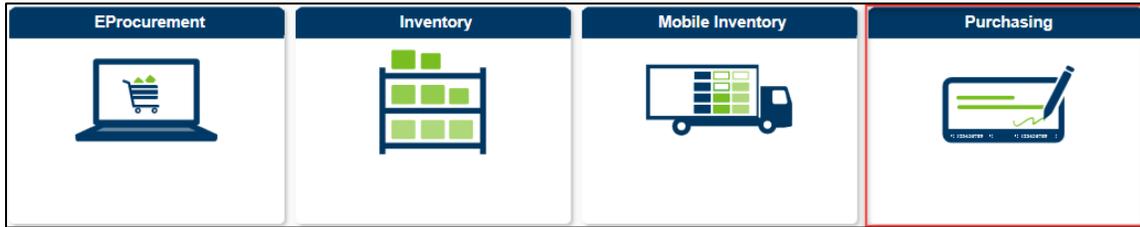
Step 1: Navigate to the PCard module.

To perform any work on PCards, you will need to access the Procurement Card tile in SWIFT.

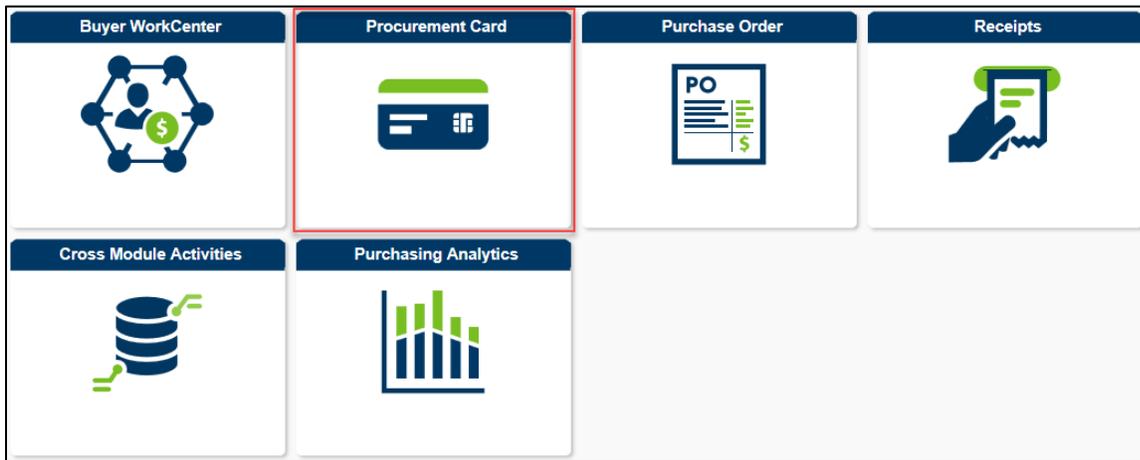1. From the *Homepage*, select the **Procurement** tile.
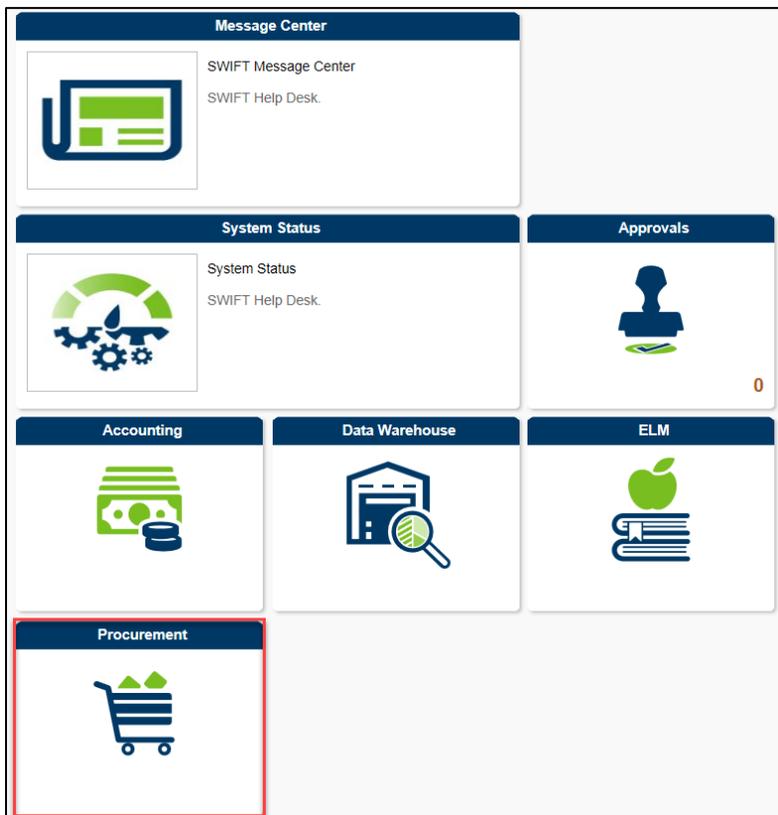
2. Select the **Purchasing** tile to find the PCard module.

3. Select the **Procurement Card** tile to open the PCard module.

Step 2: Select a folder and page to begin PCard work.

Options to access PCard pages display in the left-menu, which contains folders that categorize PCard pages, including *Reconcile* (pages to reconcile transactions), *PCard Set Up* (pages to set up cardholder profiles and proxies), *Reports* (pages to run reports on cardholder information), and *Process Statements* (pages to correct errors).

1. Select one of the folders to open a page, which will open in the work area to the right. For example, to begin searching for PCard transactions, select *Reconcile Statement*.
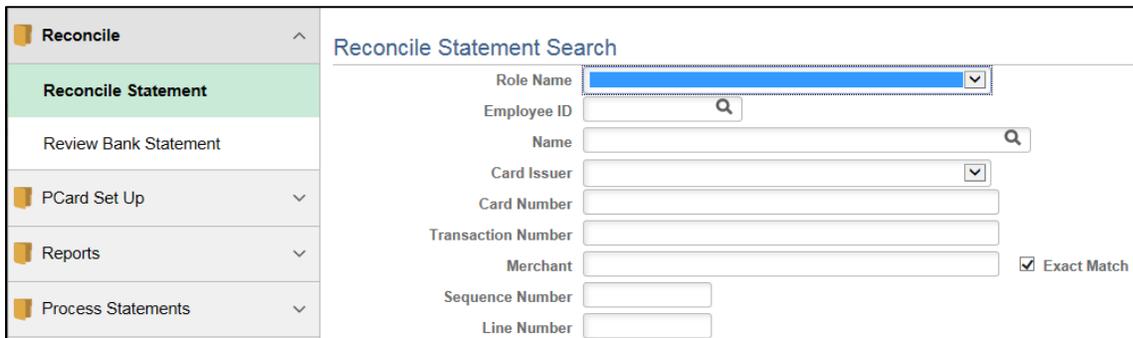
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2. Begin working on the PCard page. Otherwise, to open a different page, select another option from the left-menu. For example, to update a cardholder profile, select PCard Set Up, and then select *Cardholder Profile*.

Reconcile	⌄
PCard Set Up	⌃
Cardholder Profile	
Assign Proxies	
Assign Accounting Tags	
Register Roles	
Assign Access Rights	
Reports	⌄
Process Statements	⌄

Cardholder Profile

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

Find an Existing Value

▼ Search Criteria

Employee ID [begins with ⌄] [|]

Name [begins with ⌄] [ ]

Last Name [begins with ⌄] [ ]

☐ Case Sensitive

[Search] [Clear]   Basic Search   Save Search Criteria