SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Use the Buyer WorkCenter

WorkCenters provide a centralized place where you can access frequently used pages, queries, processes, and reports. Options that you see in the Buyer WorkCenter depend on your security roles. You may see more or fewer options than shown in this guide.

The following Buyer WorkCenter sections are covered in this guide.

Access the Buyer WorkCenter

Customize the Buyer Work Center Dashboard

Main tab

- Scope: Pending Approvals, Pending Activities, Alerts
- Links: Access to frequently used pages in Procurement

Reports/Queries tab

- Procurement Queries: Access to frequently used queries by buyers
- Reports/Processes: Access to frequently used reports or processes by buyers

Help/QRGs tab

- Use the Buyer WorkCenter reference guide
- SWIFT Help Desk

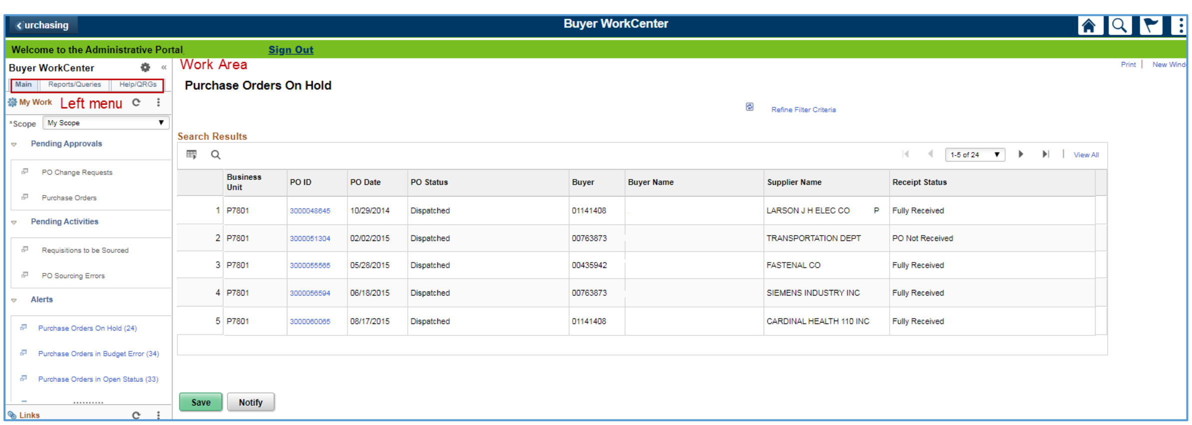
Access the Buyer WorkCenter

1. Navigate to the Buyer WorkCenter page.

Navigation Options	Navigation Path
Buyer WorkCenter	Procurement, Purchasing, Buyer WorkCenter, Buyer WorkCenter page.

2. The **Buyer WorkCenter** page displays with the left menu options and the work area on the right.

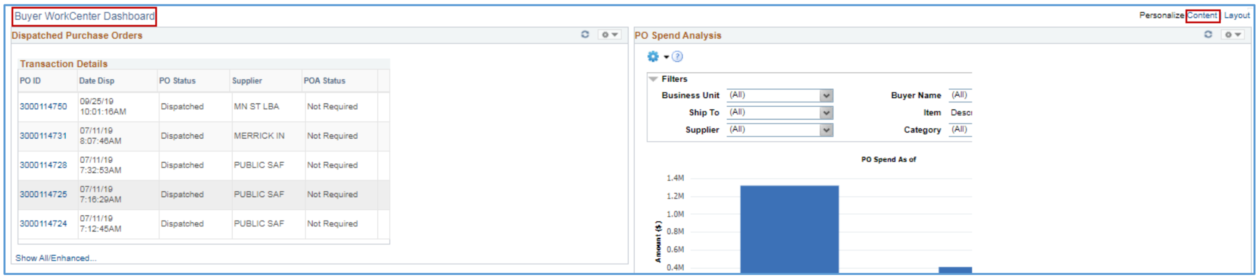
Select the **New Window** icon next to a link in the left menu to open information in the work area.



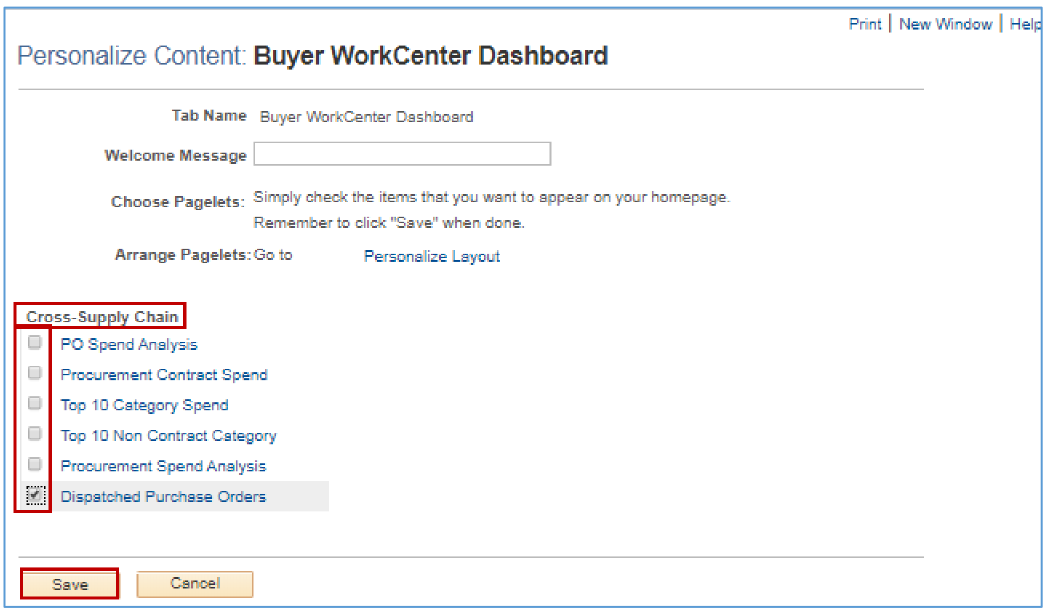
Customize the Buyer WorkCenter Dashboard

Several reports default into the **Buyer WorkCenter Dashboard**. You can customize what report you want to appear on the **Dashboard**. The more reports you have on your **Dashboard**, it is more likely that loading the Buyer WorkCenter can take more time.

1. To customize your **Dashboard**, select the **Content** link at the top right of the page.



SWIFT displays the **Personalize Content** page.



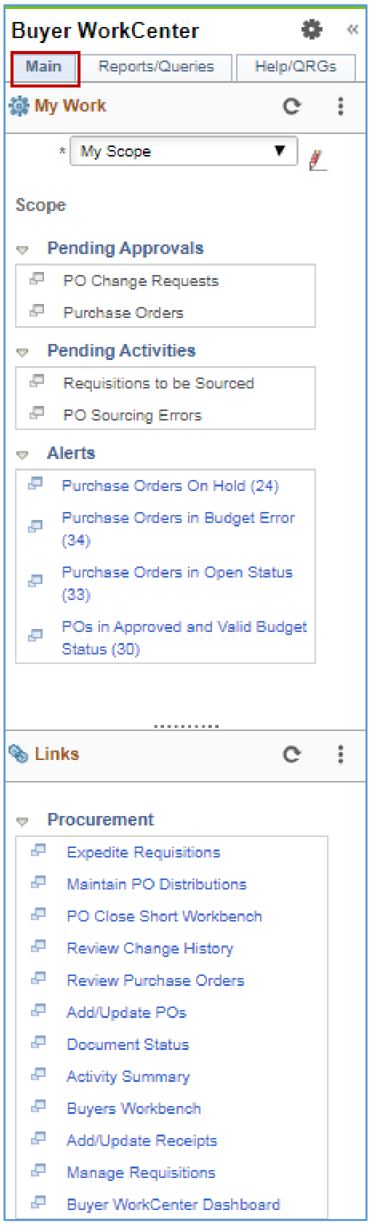
2. Update it as needed.

- On the **Cross-Supplier Chain** section, check the boxes that next to the reports that you wish to appear on your Dashboard.
- You can choose to add as many as you wish. You can also choose to select none.
- Select **Save**.

SWIFT will update your **Dashboard** with the reports you checked.

Main tab

The **Main** tab contains two sections: Scope and Links.



Items in the Scope section.

Name	Description
Pending Approvals	• **PO Change Requests**: Allows you to see change requests on purchase orders that need approval. • **Purchase Orders**: Allows you to see purchase orders that need approval.
Pending Activities	• **Requisitions to be Sourced**: Requisition lines that are in Approved status. • **PO Sourcing Errors**: Purchase order lines that are in Error status.
Alerts	Alerts list business transactions pending action in your workflow. • Purchase Orders on Hold • Purchase Orders in Budget Error • Purchase Orders in Open Status • POs in Approved and Valid Budget Status

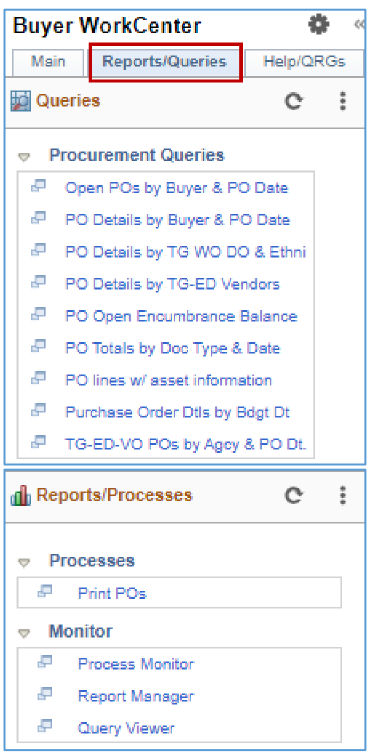
Items in the Links section.

Name	Description
Expedite Requisitions	Links to the Expedite Requisitions page. This page allows you to locate requisition lines that have been approved and are available for manual conversion into purchase orders.
Maintain PO Distributions	Links to the Maintain Distributions page, which allows you to search for purchase orders.
PO Close Short Workbench	Links to the PO Close Short Workbench, which allows you to find WorkBench IDs for the PO Close Short process.
Review Change History	Links to the Change History page, which allows you to find purchase orders with change histories. Once you select a PO Number, you can see any changes on its header, lines, and Ship to sections.
Review Purchase Orders	Links to the Purchase Order Inquiry page to search for existing purchase orders.
Add/Update POs	Links to the Purchase Order page to find an existing value or add a new value.
Document Status	Links to the Purchase Order Document Status page. You can find all documents associated with a purchase order. These transactions include receipts, requisitions, vouchers, contracts, payments and events attached to a purchase order. It also provides information about the accounting entries associated with it.
Activity Summary	Links to the Purchase Order (PO) Activity Summary page to view the receiving, invoicing, matching activities that were performed on the selected purchase orders to date. It also displays the total purchase order merchandise amount, and the merchandise received, vouchered, and matched.
Buyers Workbench	Links to the Buyer's Workbench to manage purchase orders. You can analyze, approve, dispatch, cancel, close, and print preview purchase orders.

Name	Description
Add/Update Receipts	Links to the Add/Update Receipt page in the Receipt module.
Manage Requisitions	Links to the Manage Requisitions page in the EProcurement module. You can view and manage requisitions. You can also use it to perform tasks, such as review requisition details, edit or cancel requisitions, copy a requisition, or view approvals. The available actions vary depending on the status of the requisition.
Buyer WorkCenter Dashboard	Links to the Dashboard. The items on the Dashboard are typically reports. These items may vary depending upon your roles. You can customize this section with desired reports.

Reports/Queries tab

The Reports/Queries tab contains two sections: Procurement Queries and Reports/Processes.



1. The **Procurement Queries** section brings you access to frequently used queries by buyers

Items in the Procurement Queries section.

Name
Open POs by Buyer and PO Date
PO Details by Buyer and PO Date
PO Details by TG, WO, DO & Ethnic

Name
PO Details by TG, ED Vendors
PO Open Encumbrance Balance
PO Totals by Doc Type and Date
PO Lines with Asset Information
Purchase Order Details by Budget Date
TG, ED, VO Pos by Agency and PO Date

2. **The Reports/Processes** section brings you access to frequently used reports or processes by buyers.

Items in the Reports/Processes section.

Name
Print POs
Report Manager
Process Monitor
Query Viewer

Help/QRGs tab

The Help/QRG tab contains two sections: Use the Buyer WorkCenter reference guide and the SWIFT Help Desk information.