

Overview of Changes in Purchase Order

September 1, 2019

This overview contains information about changes to the Purchase Order module with the SWIFT Limited Upgrade, including:

- New left menu options
- Ease of Approvals
- PO Close Short
- Global Search

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

New Left Menu Options

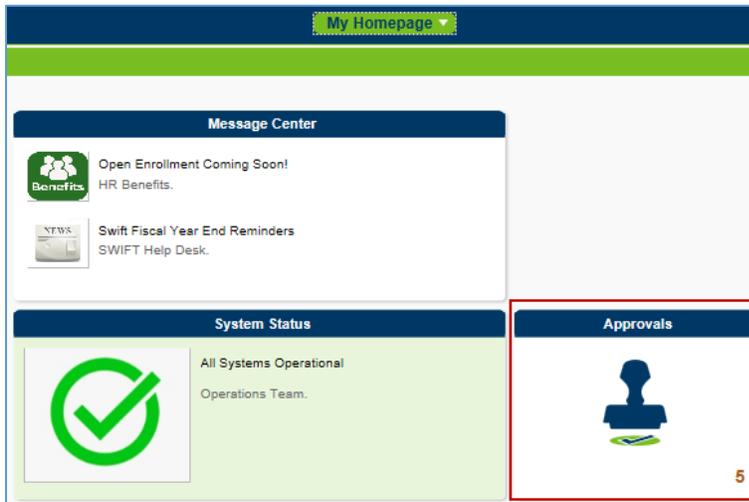
The Purchase Order module offers a new look and feel with the same functionality. It will feel familiar to you.

- The new left menu on the Purchase Order module allows agencies to easily access the Buyers Workbench and to print purchase orders.
- The new left menu also provides an easy way to find reports to better manage purchase orders such as the Activity Summary and Document Status reports.

The screenshot displays the SWIFT Purchase Order module interface. The left sidebar menu is highlighted with a red box, showing the following options: **Buyers Workbench**, **Print POs**, **PO Inquiry**, **Purchase Orders**, **Activity Summary**, **Document Status**, and **PO Accounting Entries**. The main content area shows the 'Maintain Purchase Order' page with various fields and buttons. The 'PO Date' is set to 05/31/2019, and the 'Supplier' is Xiong, Nalee. The 'PO Reference' field is empty. The 'PO Status' is 'Initial', and the 'Budget Status' is 'Not Chk'd'. The 'Receipt Status' is 'Not Recvd'. The 'Dispatch' button is visible. The 'Amount Summary' link is also present at the bottom right of the main content area.

Ease of Approvals

The Approval tile on the home page allows approvers of purchase orders to easily find and review purchase orders.



PO Close Short Workbench

Agencies can use the new PO Close Short Workbench to maintain purchase orders. It allows buyers to avoid needing to review each line of the multiple line purchase order that is not fully received and not fully vouchered. This process does not create a change order.

The screenshot displays the 'PO Close Short Workbench' interface. At the top, it shows 'Business Unit G1001' and 'WorkBench ID CLOSE'. Below this, there is a text field for '*Description' containing 'Close Short Process'. A 'Search Criteria' section is expanded, showing various search filters: 'Purchase Order' (3000004829), 'PO Line From', 'PO Date', 'Activity Date', 'Due Date', 'Supplier ID', 'Item ID', 'Contract SetID', 'Receiving' (dropdown), 'To' (3000004829), 'PO Line To', 'To', 'To', 'To', 'Buyer', 'GPO ID', 'Contract ID', 'Match Line Option', and 'Match Status'. A 'Search' button is located at the bottom of the search criteria section.

Global Search

The new Global Search may help you find purchase orders more quickly.

- Select the Global Search icon in the top bar and enter your search criteria. In the example below, the search is limited to looking for records with a specific PO ID.
- Launch the search. Records matching your search criteria display on the **Search Results** page.
- Select a record in the search results to view more information.

Search Results

[Sign Out](#) Purchasing/Procurement 3000156099

View Search Results

1 results for keyword: "3000156099"

Purchase Order - R2901 | 3000156099
Supplier: | Date: 2019-09-09 | Status: Dispatched | Amount: 10 USD | Buyer | PO Reference: | Hold From Processing: N | A12
Type: CRO | Agency Reference:

You can view information where you have roles and permissions.