

Purchase Order Document Status Inquiry

Use the **Document Status** inquiry to find out all of the 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. You can also access the **Document Status** inquiry from within each individual transaction.

This guide describes the steps to use the **Document Status** page. It also lists the actions or items you can view when you select a document associated with an individual purchase order.

Steps to complete

- Step 1: Navigate to the Document Status page for the selected purchase order
- Step 2: Review the Document Status page for the selected purchase order

Steps to use the Document Status page

Step 1: Navigate to the Document Status page for the selected purchase order

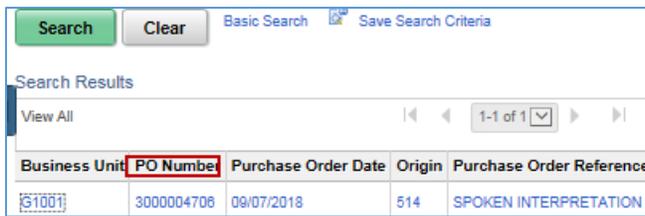
1. Navigate to the **Document Status** page.

Navigation Option	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchase Order. Left menu, PO Inquiry section, Document Status, Purchase Order Document Status page

2. On the **Purchase Order Document Status** search page, use the **Find an Existing Value** tab to enter or confirm your *Business Unit* and enter other search criteria (e.g., *PO Number*). When ready, press the **Search** button.

The screenshot shows the 'Purchase Order Document Status' search page. On the left, a navigation menu is visible with 'Document Status' selected. The main area has a search form with the following fields: Business Unit (G1001), PO Number (4708), Purchase Order Date, Origin (begins with), and Purchase Order Reference (begins with). There is a 'Search' button at the bottom left of the form area.

3. SWIFT displays the **Search Results** section. Select the *PO Number* of the purchase order you wish to view.

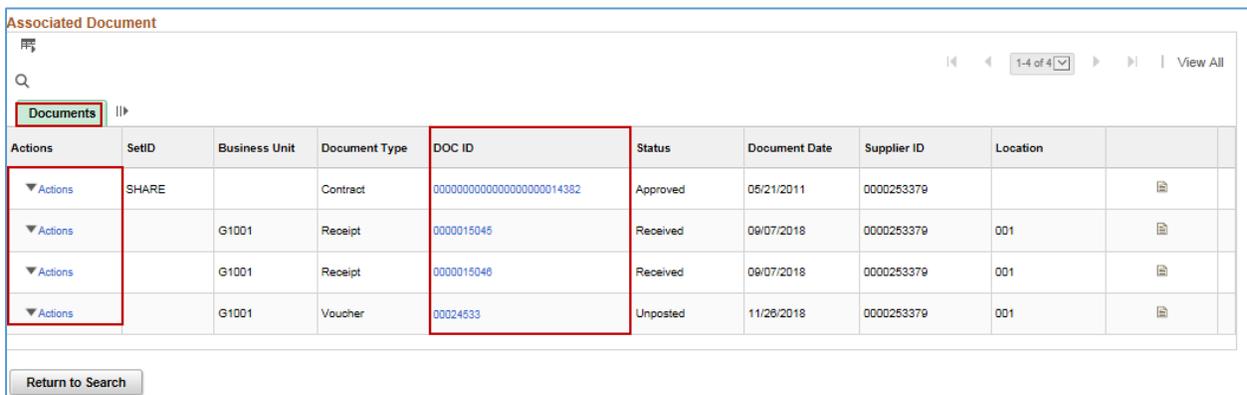


SWIFT displays the **Document Status** page for that purchase order.

Step 2: Review the Document Status page for the selected purchase order

The **Document Status** page shows you associated documents such as a purchase order, voucher or payment. On **Document Status** page, you have several actions you can take. They are described below.

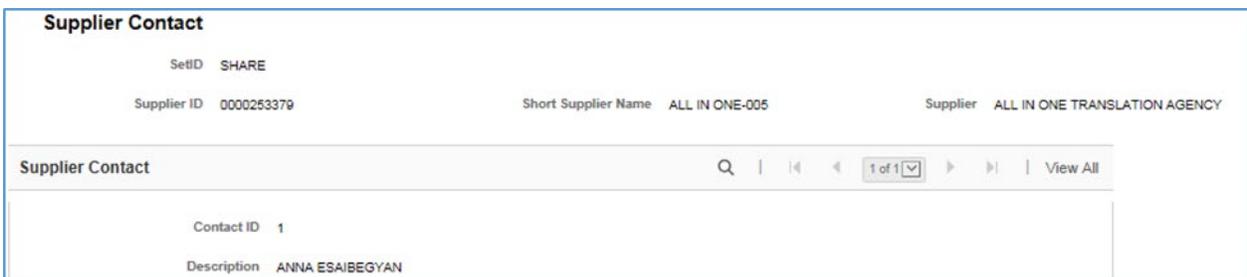
- Supplier Contacts
- Purchase Order Inquiry
- Contract
- Receipt
- Voucher



When you select a *Document ID*, SWIFT opens up a new window. Close that window when you are done with it.

1. Supplier Contacts

Each line on the **Document Status** page has an **Actions** tab. If you select the **Action** for the document, SWIFT opens up a new window that brings you to **Supplier Contact** page, which lists the supplier contact(s) with the document.



2. Purchase Order Inquiry

- If you select the *PO ID*, SWIFT opens up a new window that brings you to the **Purchase Order Inquiry** page for that purchase order. You can navigate sections as needed.
- An inquiry page means you can view it but cannot edit it.

Purchase Order Inquiry

Purchase Order

Business Unit: G1001	Origin: 514 Management Services
PO ID: 3000004706	PO Status: Dispatched
	Budget Status: Valid

Header

PO Date: 09/07/2018	Doc Tol Status: Valid
Supplier Name: ALL IN ONE-005 Supplier Details	Backorder Status: Not Backordered
Supplier ID: 0000253379 Response Documentation	Receipt Status: Received
Buyer	<input type="checkbox"/> Hold From Further Processing
PO Reference: SPOKEN INTERPRETATION	Document Type: BPC Blanket Purchs Agnst A Contract
Billing Location: G104THFL00 Billing Address	Agency Reference
Header Details	Amount Summary
All RTV	Merchandise: 1,000.00
Matching	Freight/Tax/Misc.: 0.00
View Printable Version	Total: 1,000.00 USD
Actions	Encumbrance Balance: 1,000.00 USD

Lines

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		SPOKEN INTERPRETATION SERVICES	82112000	1.0000	EA	1,000.00 USD	Approved

3. Contract

- If the purchase order was created by referencing a contract, there will be a contract document. On the **Documents** tab, select the *Contract ID*.

Documents

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	SHARE		Contract	0000000000000000000014382	Approved	05/21/2011	0000253379	
▼ Actions		G1001	Receipt	0000015045	Received	09/07/2018	0000253379	001
▼ Actions		G1001	Receipt	0000015046	Received	09/07/2018	0000253379	001
▼ Actions		G1001	Voucher	00024533	Unposted	11/26/2018	0000253379	001

Return to Search

- SWIFT opens up a new window that displays the **Contract Events** page. It shows all of the contracts that agencies created from the original contract.

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- Check the **Sel** (Select) box and scroll to the bottom of the page and press either the **View Contract ID Line** or the **View Contract ID Category** links at the bottom of the page.

Contract Events

Sel	Version	Type	BU	ID	Status	Reference	Release	Amount	Currency
<input checked="" type="checkbox"/>	1	PO Release	B2201	3000014407	Complete	5311307487	7	20.00	USD

[View Contract ID Line](#)
[View Contract ID Category](#)

- SWIFT opens up a new window to information about the contract line or category.

4. Receipt

- To view receipt information, select the *Doc ID* for a receipt.

Documents

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	SHARE		Contract	00000000000000000000000014382	Approved	05/21/2011	0000253379	
▼ Actions		G1001	Receipt	0000015045	Received	09/07/2018	0000253379	001

- SWIFT opens up a new window that displays any receipt lines associated with the purchase order. You can view information about the receipts.

Receipts

Unit: G1001 Receipt No: 0000015045 Source: On-line Receipt Status: Received

Receipt Lines

Set	Item	Description	Price	Amt Only	Recv Qty	Recv UOM	Reject Qty	Device Track
<input checked="" type="checkbox"/>	1	SPOKEN INTERPRETATION SERVICES	600.00000	<input checked="" type="checkbox"/>	1.0000	EA		<input type="checkbox"/>

[Return to Search](#) [Notify](#)

For example, if you press the **Distribution** link, SWIFT displays the ChartField information for that receipt.

5. Voucher

- To view voucher information, select the *Doc ID* for a voucher.

Documents

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	SHARE		Contract	00000000000000000000000014382	Approved	05/21/2011	0000253379	
▼ Actions		G1001	Receipt	0000015045	Received	09/07/2018	0000253379	001
▼ Actions		G1001	Receipt	0000015046	Received	09/07/2018	0000253379	001
▼ Actions		G1001	Voucher	00024533	Unposted	11/28/2018	0000253379	001

[Return to Search](#)

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- SWIFT opens up a new window to the **Voucher Inquiry Results** page. Scroll to the bottom of the page. You can get more information about the voucher attached to the purchase order.

- If you select the **Actions** link on any of the tabs on the **Voucher Inquiry** page, SWIFT provides additional information about the voucher such as **Scheduled Payment, Voucher Details** and **Review Document Status**. For example, if you press the **Voucher Details** link, you can see distributions information for that voucher.

- The **Voucher Details** tab on the **Voucher Inquiry** page shows voucher information associated with the purchase order such as the *Invoice Number, Invoice Date, Entry Status* and *Match Status*.

- The **Amounts Status** tab shows you the amount that is unpaid and paid.

- The **More Details** tab shows you information about the posting, approval, budget date and budget status.

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Voucher Details	Amounts	More Details	Supplier Details	>											
Actions	Business Unit	Voucher ID	Voucher Style	Supplier Loc	Post Status	Approval Status	Approval History	Close Status	Origin	Due Date	Basis Date	Acctg Date	Entered on	Budget Header Status	Budget Misc Status
▼ Actions	G1001	00024533	Regular Voucher	001	Unposted	Pending	Approval History	Open	ONL	12/11/2018	11/26/2018	11/26/2018	11/26/2018	Not Budget Checked	Valid Budget Check

- The **Supplier Details** tab shows you information about the supplier.

Voucher Details	Amounts	More Details	Supplier Details	>				
Actions	Business Unit	Voucher ID	Supplier ID	Short Supplier Name	Supplier Name	Additional Name	History Status	
▼ Actions	G1001	00024533	0000253379	ALL IN ONE-005	ALL IN ONE TRANSLATION AGENCY		<input type="checkbox"/>	

You have now completed the Purchase Order Document Status Inquiry.