

QUICK REFERENCE GUIDE

Updated November 1, 2019

Run SWIFT Queries for Purchase Order Data

This guide provides a list of SWIFT queries agencies commonly use to look up information on purchase orders using SWIFT's Query Viewer. It also lists the steps to access the Query Viewer in the Purchase Order module.

NOTE: some queries allow you to use a wild card or percent sign (%). SWIFT will return all of the values in that field.

Steps to complete

- Step 1: Access the Query Viewer and search for the desired query
- Step 2: View the results of the search

Common queries in the Purchase Order module

This list of queries is the most commonly used in the Purchase Order module. It also includes recommended queries from agencies and the SWIFT Help Desk.

Query Name	Purpose
M_AP_GBL_1099_RPT_ACCTS	List of Account Codes in SWIFT that are 1099 reportable.
M_AP_GBL_1099_RPT_BY_ACCT	Look up an individual Account Code in SWIFT to see if it is 1099 reportable.
M_AP_GBL_PYMNTS_BY_PO	Lists vouchers against a purchase order.
M_CG_GBL_CAT_VNDR_TG_ED_VO	Vendors by UNSPSC and TG/ED/VO. You can use a Wild Card.
M_CG_GBL_CAT_VNDR1	Finds vendors by United Nations Standard Products and Services Code (UNSPSC).
M_CG_GBL_CATEGORY_LOOKUP	Look up Category Codes (e.g., UNSPSC).
M_CG_GBL_FIND_UNSPSC_BY_ACCT	Find the Category by Accounts.
M_PO_GBL_DBA_NAME	Find the correct vendor and location for businesses who may be conducting business under various names (e.g., Doing Business As).
M_PO_GBL_OPEN_ENCUM_BALANCE	Find open encumbrances based on a budget date range. You can search by Fund, Fin Dept ID and Approp ID.
M_PO_GBL_OPEN_ORDERS_BY_DATES	Find open purchase orders by dates, Business Unit, buyer and document type.
M_PO_GBL_PO_DETAILS_BY_VENDOR	List of purchase orders for a particular vendor.
M_PO_GBL_PO_DETAILS_BY_PO_DATE	Lists the details of a purchase order. Some agencies run this report every quarter per buyer for large purchases.
M_PO_GBL_PO_LINE_ASSET_RELATED	Find purchase order lines with asset information.

Query Name	Purpose
M_PO_GBL_POS_WITH_0_ENCUM_BAL	List of purchase orders with a zero balance. Helps with year-end planning.
M_PO_GBL_VNDR_LOOKUP_TG_ED	Vendor lookup for ED, TG or MDHR by Category Code.
M_SC_GBL_CNTRCT_RELEASES_BY_BU	List of contract releases by business unit. Includes the buyer.
M_SS_GBL_ACTIVE_REG_VNDR	The list of Vendor IDs that are active in SWIFT.
M_VENDOR_INQUIRY	Vendor Status, Location, DBA, Remit Address, etc.

Steps to run queries for purchase order data

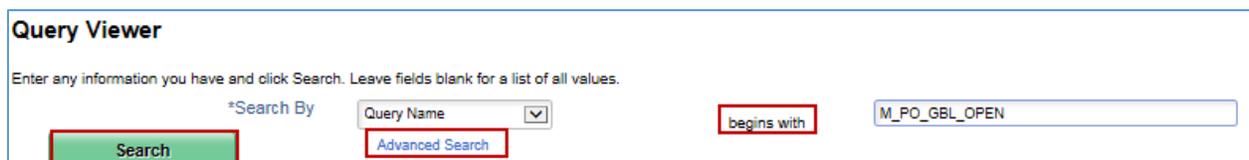
Step 1: Access the Query Viewer and search for the desired query

1. Navigate to the **Query Viewer** page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchase Order, Purchase Orders. Top right “Need Help?” button. Common Utilities, scroll down, Query Viewer.
Contract / Sourcing WorkCenter	Procurement, Purchase Order, Buyer WorkCenter. Left menu Reports/Queries tab. Left menu, Query Viewer.



2. Enter your search criteria, such as the name of the query you want to run. It must follow the naming conventions (e.g., M_PO_GBL_).
3. You can select the **Advanced Search** option if you are not sure of the name. It must follow the naming conventions.
4. Press the **Search** button.



Step 2: View the results of the search

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
M_PO_GBL_OPEN_BALANCE_BY_PO_DT	Open Encumbrance Bal By PO Dt	Public	PURCHASE ORDER	HTML	Excel	XML	Schedule	Lookup References	Favorite
M_PO_GBL_OPEN_ENCUM_BALANCE	PO Open Encumbrance Balance	Public	PURCHASE ORDER	HTML	Excel	XML	Schedule	Lookup References	Favorite

- SWIFT displays the **Search Results** of queries that fit your search criteria.

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Tip: You can select the **Add to Favorite** link to add the queries to your **My Favorites Queries**. You won't have to search for them again.

- Select the output of the results.
 - In the search results section, select the option you want for the output of the query results.
 - Select "HTML" to view the query results on the screen. If you select "HTML", you have the option to export the results to Excel or another format after viewing the data on the **Results** page.
 - Or, select "Excel" to download the results in a Microsoft Excel file. SWIFT opens a new tab to run the query.
- Enter the prompt information which will vary depending on which query you chose to run. Press the **View Results** button.

M_PO_GBL_OPEN_ENCUM_BALANCE - PO Open Encumbrance Balance

PO Business Unit:

PO ID:

Origin:

Fund:

Fin DeptID:

AppropriID:

Budget Dt From:

Budget Dt To:

View Results

- If you chose "HTML" for the output, the results will display on the page.

Row	Unit	PO No.	Supplier	Location	Supplier	Doc Type	PO Date	Buyer	Entered By	Date Entered	PO Status	Origin	Origin Descr	Line Number	Line Item Descr	Sched Num	Distribution LI	Budg Dt	PO Encum Bal	Original Balance	Fund	Fund Descr	Fin DeptID	DeptID Descr	AppropriID	AppropriID Descr	Account	Account Descr	SW Cost	Agcy Cost	PC Cost	Project ID	Activity	Invoice Type		
1	G1001	3000004676	B220000000	1	EMPLOYMENT & ECONOMIC DEVELOPMENT DEPT	KEO	07/02/2018			06/26/2018	Dispatched	509	Accounting Services	1	SWIFT Warrant Printing for FY19	1		1	07/02/2018	8233.280	8700.000	2001	Other Misc Special Revenue	G1031300	SWIFT System Support	G1000119	Statewide Systems Billing	411101	Printing - Non-State Shops							
2	G1001	3000004676	B220000000	1	EMPLOYMENT & ECONOMIC DEVELOPMENT DEPT	KEO	07/02/2018			1/06/2018	Dispatched	509	Accounting Services	1	SEMAA (Payroll) Warrant Printing for FY18	1		1	07/02/2018	1285.410	1402.380	2001	Other Misc Special Revenue	G1031300	SWIFT System Support	G1000119	Statewide Systems Billing	411101	Printing - Non-State Shops							

- If you chose "Excel", SWIFT displays a prompt asking what you want to do with the Excel file. Options include "Open", "Save", or "Cancel".

Do you want to open or save **M_PO_GBL_OPEN_ENCUM_BALANCE_1843404393.xlsx** (98.2 KB) from **fms.systems.state.mn.us**?

Open **Save** **Cancel**

- If you select "Open", SWIFT opens up the Excel file for you to view and save.

1	PO Open Encum	450					
2	Unit	PO No.	Supplier	Location	Supplier	Doc Type	PO Date
3	G1001	3000004676	B220000000	1	EMPLOYMENT & ECONOMIC DEVEL	KEO	7/2/2018
4	G1001	3000004676	B220000000	1	EMPLOYMENT & ECONOMIC DEVEL	KEO	7/2/2018
5	G1001	3000005004	0000222961	1	AMERICAN PAYROLL ASSOC	DPO	3/14/2019
6	G1001	3000005003	0000193413	1	HEINRICH ENVELOPE CO	CRO	3/13/2019

You have successfully run a SWIFT query for purchase order data.