

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### Print a Purchase Order

Buyers must have the approved SWIFT roles to use the Report Manager to print authorized versions of purchase orders. An authorized version of a purchase order is viewed as an official financial document. It can be used as a legal document. An unauthorized version is for internal use only. It is not meant to be sent to a supplier.

**IMPORTANT:** Some purchase order document types are set up to not print authorized versions. They include blanket purchase orders and encumbering orders.

You can print an authorized version of purchase order using the Report Manager. You can access the Report Manager in the Navigation Collection or on the Need Help button at the top of most pages.

#### Options to print a purchase order:

1. Email it to yourself when you dispatch it to get an authorized version.
2. Print an unauthorized version of the purchase order using the View Printable Version link.
3. Use the Report Manager to get an authorized version after you dispatched it.

This guide covers these three options to print a purchase order.

Steps to print an authorized version of the purchase order when you dispatch it

- Step 1: Create and process the purchase order up to dispatch
- Step 2: Dispatch the purchase order to your email address

Steps to print an unauthorized version of the purchase order directly from it

- Step 1: Access the purchase order
- Step 2: Print the purchase order

Steps to use the Report Manager to get an authorized version after you dispatched it

- Step 1: Access the Print POs page/Report Manager
- Step 2: Set up the Purchase Orders Print page
- Step 3: Run the report
- Step 4: View the report

## Steps to email the purchase order to yourself when you dispatch it to get an authorized version.

### Step 1: Create and process the purchase order up to dispatch

After the purchase order has a *PO Status* of “Approved” and a *Budget Status* of “Valid”, you can direct SWIFT to dispatch the purchase order to you.

1. Update the *Dispatch Method* to “Email”.

Business Unit G1001 Origin: 514 Management Services PO Status Approved  
PO ID 3000004701 Approval Exception Budget Status Valid  
Copy From [dropdown] Hold From Further Processing [checkbox]  
▼ Header ⓘ  
\*PO Date 07/23/2018 Response Documentation Doc Tol Status Valid  
Expiration Date [calendar] Supplier Search Receipt Status Not Recvd  
\*Supplier PLACEHOLDER-001 Supplier Details \*Dispatch Method Email [dropdown] Dispatch

2. Press the **Dispatch** button.

### Step 2: Dispatch the purchase order to your email address

1. SWIFT opens up the **Dispatch Option** page. On the **One Time Fax/Email** section, enter your email address. Select **OK**.

▼ Process Control Option  
Supplier/Contact Fax/Email  
Email ID Swift.Testing@state.mn.us  
One Time Fax/Email  
The following fax / e-mail will override the supplier/contact information above if specified.  
Email ID shelia.cunningham@state.mn.us  
OK Cancel Refresh

2. SWIFT displays the **PO Dispatch** confirmation message. Select **Yes** for SWIFT to email you a copy of the purchase order when it is dispatched.

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)  
Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.  
Yes No

SWIFT will update the *PO Status* to “Dispatched”.

Purchase Order  
Business Unit G1001 Origin: 514 Management Services PO Status Dispatched  
PO ID 3000004701 Approval Exception Budget Status Valid

3. Check your email. SWIFT will attach a copy of the purchase order. Check the signature area, where it shows an authorized version of the purchase order.

<b>Issuer certifies that funds have been encumbered and appropriate approvals have been obtained.</b>	<b>Issued By:</b> <i>Shelia M Cunningham</i>
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You have successfully emailed the purchase order to yourself when you dispatched it to get an authorized version.

## Steps to print an unauthorized version of the purchase order directly from it

### Step 1: Access the purchase order

1. Navigate to the **Purchase Order** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Purchasing, Purchase Order, Purchase Order page defaults.
<b>WorkCenter</b>	Procurement, Purchasing, Buyer WorkCenter. Left menu Links, Add/Update POs, Purchase Order page.

2. On the **Purchase Order** page, select the **Find an Existing Value** tab.

SWIFT opens up the **Search Criteria** section of the **Find an Existing Value** page. Enter search items such as the *PO ID*. Press the **Search** button.

**Purchase Order**

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

Find an Existing Value
Keyword Search
Add a New Value

**Search Criteria**

Business Unit =

PO ID contains

Origin begins with

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

- On the **Search Results** section, select the *PO ID* of the purchase order you wish to print.

Search Results							
View All							
Business Unit	PO ID	Origin	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name
R2901	3000137888	A12	03/28/2019	Dispatched	MORELLIS-001	0000842214	MORELLIS DISCOUNT LIQUOR MEATS & ITALIAN

SWIFT displays the **Maintain Purchase Order** page for the selected purchase order.

## Step 2: Print the purchase order

- On the bottom of the **Maintain Purchase Order** page, select the **View Printable Version** link.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		SPOKEN INTERPRETATION SERVICES (NOT PT)	1.0000	EA	82112000	1,000.00000	1,000.00	Approved

View Printable Version  
View Approvals

Close Short All Lines

\*Go to ... More ...

- Respond to the SWIFT message if you wish to print the purchase order with distribution details.

Do you want to print the purchase order with distribution details Yes / No. (10250,337)

SWIFT displays a copy of the purchase order. You can print it now or save it and print it later. The bottom line shows that it is an unauthorized version.

Issuer certifies that funds have been encumbered and appropriate approvals have been obtained.	Unauthorized
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You have successfully printed an unauthorized version of a purchase order directly from it.

## Print a purchase order using the Report Manager

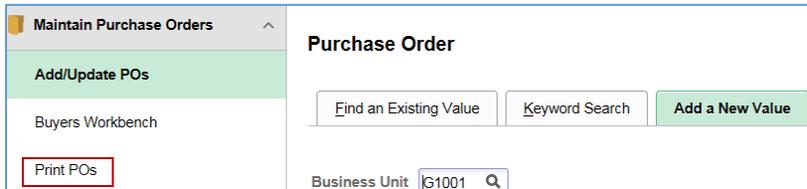
Buyers must have the approved SWIFT roles to use the **Report Manager** to print purchase orders. Certain purchase orders are set up to not print authorized versions. They include blanket purchase orders and encumbering orders. Any time after you dispatch a purchase order, you can go to the **Report Manager** to print an authorized version of it.

## Step 1: Access the Print POs page/Report Manager

1. Navigate to the **Purchase Order** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchase Order. Left menu Links, Print POs

2. On the left menu, press the **Print POs** link.



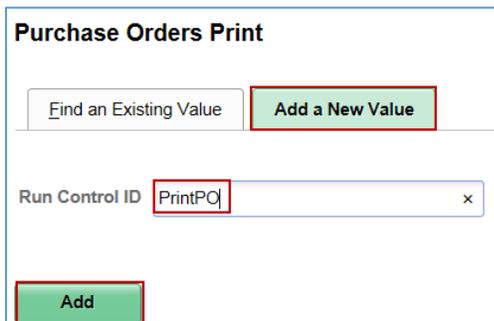
SWIFT opens up the **Purchase Orders Print** page, which is also the **Report Manager**.

## Step 2: Set up the Purchase Orders Print page

1. Enter a *Run Control ID*. They are reusable. Do not keep adding new ones.

**NOTE:** A process run control enables users to predefine parameters that are later used to a given process request. Using the same *Run Control ID* allows a user to pull in the values used to run the last instance and apply them to a new instance.

- If you are not sure if you have a *Run Control ID*, press the **Search** button. SWIFT displays all of your **Run Control IDs**. Select the one that best fits this process request.
- If this is your first time in the **Purchase Orders Print** page, create a *Run Control ID*.
- Select the **Add a New Value** tab. Enter a *Run Control ID* that you can remember. Press the **Add** button.



2. SWIFT opens up the **Print POs** page. You will set up this instance with data for the report to run. You can update this data the next time you run this report.
  - Enter **Report Request Parameters** such as the *Business Unit* and *PO ID*.
  - Enter the *Business Unit* in both the *To* and *From* fields.
  - If you are looking for more than one purchase order, enter *Statuses* to include them. Check the boxes of the statuses you wish to include.

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- Press the **Save** button when you are done entering data on this page. If you are using an existing *Run Control ID*, you do not need to save it.

**Print POs**

Run Control ID PS\_PO\_R29013000072297\_2649950 Report Manager Process Monitor **Run**

Language English  Specified Language  Recipient's Language

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**Report Request Parameters**

Business Unit R2901 To R2901

PO ID 3000072297 [Select Purchase Order](#)

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Template ID PO\_XMLP\_PRINT\_1

**Statuses to Include**

Approved  Dispatched  Canceled

Open  Pending  Completed

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**Miscellaneous Options**

\*Hold Status On Hold AND Not On Hold

\*Chartfields Recycled AND Valid Chartfields

Change Orders UnChanged Orders

Print Changes Only

Print PO Item Description

Print Duplicate

Number Of Copies 1

Sort By Sort by Line Number

**Save** Return to Search Previous in List Next in List Notify
Add Update/Display

### Step 3: Run the Report

1. On the top of the page, press the **Run** button.
2. SWIFT opens up the **Process Scheduler Request** page. Press **OK**.

**Process Scheduler Request**

User ID 01087463 Run Control ID PrintPO

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Server Name  Run Date 09/10/2018

Recurrence  Run Time 3:09:39PM **Reset to Current Date/Time**

Time Zone

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**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO BI Publisher Print	M_POXMLP	PSJob	(None)	(None)	Distribution

**OK** Cancel

3. As an option, you can select the **Process Monitor** link at the top of the page to see if the report is ready to be viewed.

**Print POs**

Run Control ID PrintPO Report Manager **Process Monitor** Run

Language English  Specified Language  Recipient's Language

SWIFT opens up the **Process List** page. Your report is ready when the *Run Status* is “Success” and the *Distribution Status* is “Posted”.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	25799042		PSJob	M_POXMLP	01087463	09/10/2018 3:09:39PM CDT	Success	Posted	Details

- At the bottom of the **Process List** page, select the **Go back to Purchase Orders Print** link.

## Step 4: View the report

- On the **Print POs** page, select the **Report Manager** link at the top of the page.

**Print POs**

Run Control ID PrintPO [Report Manager](#) Process Monitor

Language English   Recipient's Language

- On the new page, select the **Administration** tab. Press the link under *Description* “POXMLP\_PRINT-POXMLP\_PRINT.pdf”.

List Explorer **Administration** Archives

**View Reports For**

User ID 01087463 Type  1 Days

Status  Instance to

**Report List**

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	23510754	25799043	POXMLP_PRINT - POXMLP_PRINT.pdf	09/10/2018 3:11:16PM	Acrobat (*.pdf)	Posted	Details

SWIFT displays a PDF of the purchase order. It is an authorized version.

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**You have successfully printed an authorized version of a purchase order using the Report Manager.**