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”.

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.

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.

SWIFT will update the PO Status to “Dispatched”.

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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.

Issuer certifies that funds have been encumbered and appropriate approvals have been obtained.  

Issued By:  
Sheila M Cunningham

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.

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Procurement, Purchasing, Purchase Order, Purchase Order page defaults.</td>
</tr>
<tr>
<td>WorkCenter</td>
<td>Procurement, Purchasing, Buyer WorkCenter. Left menu Links, Add/Update POs, Purchase Order page.</td>
</tr>
</tbody>
</table>

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 the PO ID. Press the Search button.
3. On the Search Results section, select the PO ID of the purchase order you wish to print.

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

Step 2: Print the purchase order

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

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

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.

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.

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Procurement, Purchasing, Purchase Order. Left menu Links, Print POs</td>
</tr>
</tbody>
</table>

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.
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.

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

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

Step 4: View the report

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

2. On the new page, select the Administration tab. Press the link under Description “POXMLP_PRINT-POXMLP_PRINT.pdf”.

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

Issuer certifies that funds have been encumbered and appropriate approvals have been obtained.  
Issued By:  
Sheila M Cunningham

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