SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Purchase Order Quick Start Guide

September 1, 2019

Starting in December 2019, there will be changes to SWIFT. While the new version will have a new look and feel, this upgrade will not affect how most processes are completed in SWIFT.

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.

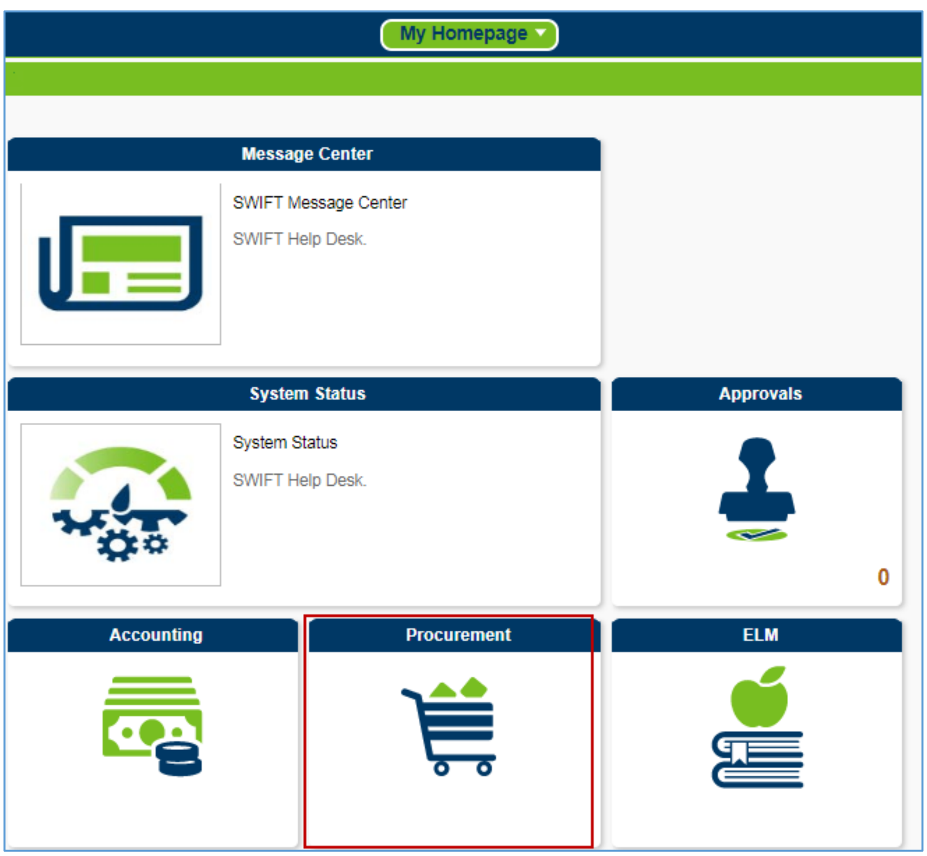
This guide introduces you to the Purchase Order module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles. This guide shows the typical Purchase Orders page for most buyers.

The upgraded version of SWIFT organizes the options based on the navigation collection, which is the links to commonly used features for the module. You'll find them on the left menu.

- Step 1: Navigate to the Purchase Order module
- Step 2: View the Purchase Orders page to see how it is organized

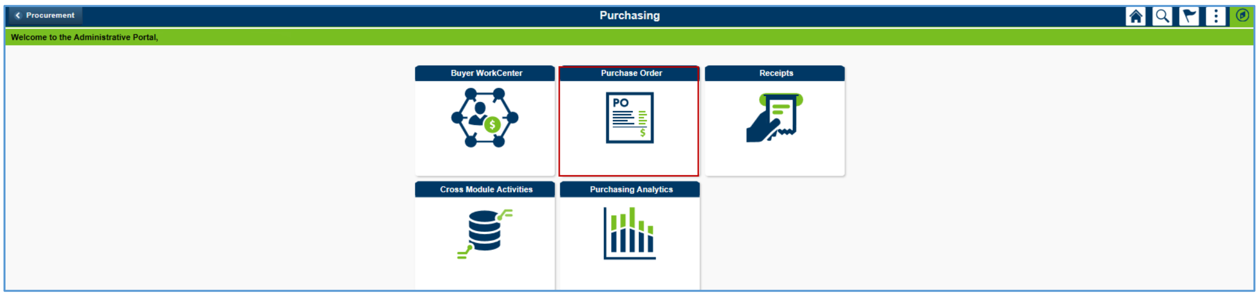
Step 1: Navigate to the Purchase Order module

1. From **My Homepage**, select the **Procurement** tile.



2. On the **Procurement** page, select the **Purchasing** tile

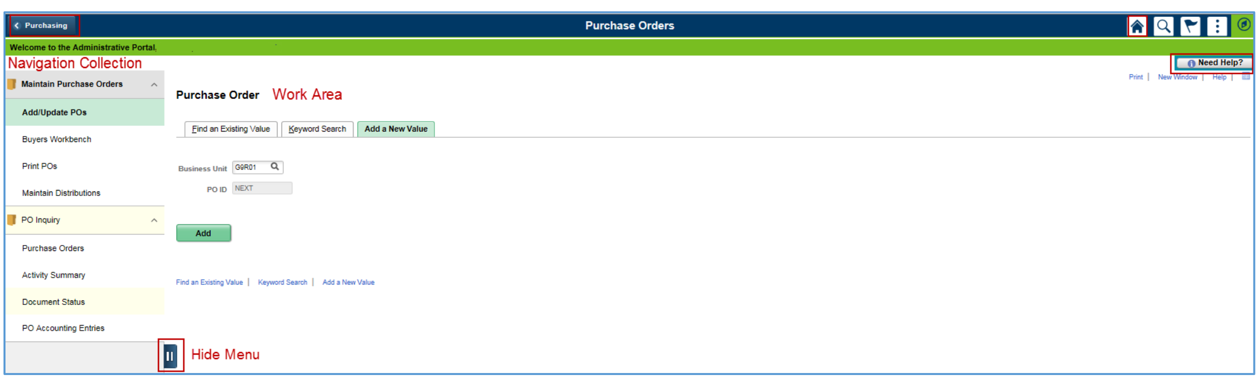
3. On the **Purchasing** page, select the **Purchase Order** tile.



Step 2: View the Purchase Orders page to see how it is organized

1. Review the **Purchase Orders** page.

- **Navigation collections** are on the left menu of the page. You can hide this menu as needed.
- The center of the page is the **work area**. This is where you will create and manage purchase orders.
- The **Need Help** button allows you to find Quick References guides for this module. It also brings you to the Query Viewer for running reports.
- Use the back button on the left of the top menu to return to previous pages.
- Use the **Home** button on the top menu to return to your **My Homepage**.



2. Review a description of the Navigation Collection.

Navigation Collection	Description of Folders and Pages
Add/Update POs	Use this page to create and process new purchase orders (Add a New Value tab) and to update and process existing purchase orders (Find an Existing Value tab).

Navigation Collection	Description of Folders and Pages
Buyers Workbench	Use the Buyers Workbench to manage purchase orders such as closing, canceling and budgeting checking individual or groups of purchase orders. You will need the role to use this feature.
Print POs	Brings you to the Report Manager to print an authorized version of the purchase order. You will need the role to use this feature.
Maintain Distributions	Use the Maintain Distributions search page to find the distribution information on an individual purchase order in your Business Unit. You can update the ChartField information if you have permissions.
PO Inquiry	• **Purchase Orders:** Agency staff with the Purchase Order Inquiry role in SWIFT can look up an individual purchase order using the Purchase Order Inquiry. • **Activity Summary Errors**: Use the Purchase Order (PO) Activity Summary page to view the receiving, invoicing, matching activities that were performed on the selected purchase orders to date. • **Document Status**: 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. • **PO Accounting Entries:** Use the PO Accounting Entries inquiry to find accounting information for an individual purchase order or for a group of purchase orders using the search criteria. This inquiry allows agencies to gather a large amount of data in one place.