SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

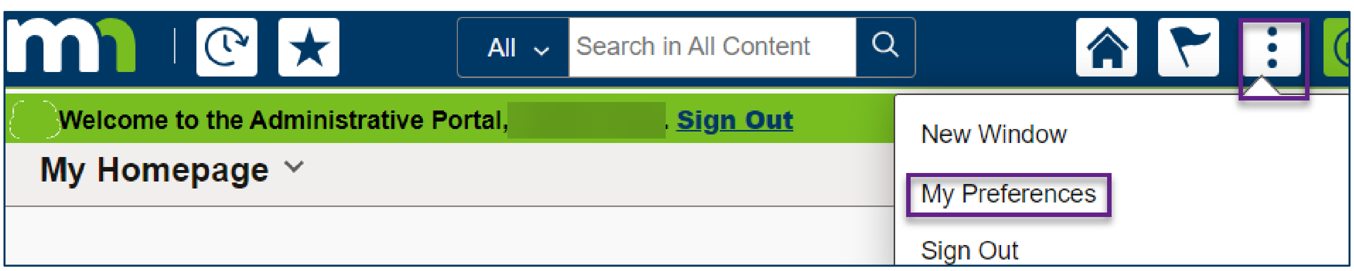
Use the Purchasing Analytics Reports

Depending upon your permissions, you may be able to access the Purchasing Analytics page. This page is available only to staff with a Buyer role in SWIFT. The Purchasing Analytics page in the Purchasing section lists these reports for agency staff to view and manage procurement transactions.

- Expiring Contracts
- Purchase Order Approval Cycle Time
- Requisition to Purchase Order Cycle Time
- Supplier Watch List
- Procurement Spend Analysis
- Payment Spend Analysis

IMPORTANT: The data within these reports goes back only **12** months.

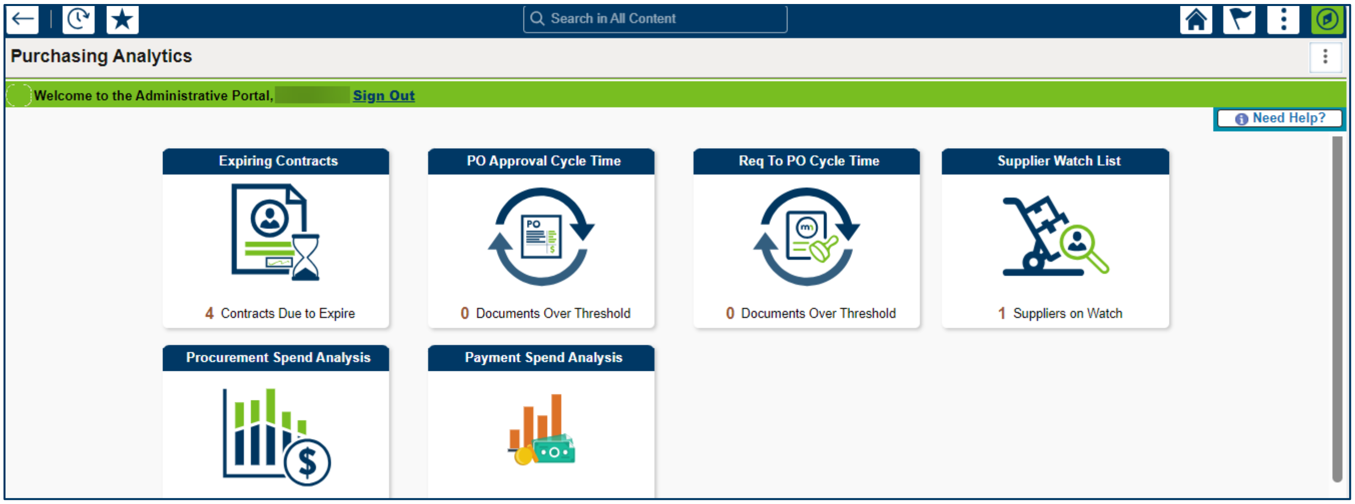
Within several of these reports, you can designate thresholds used in them using **My Preferences**. Access My Preferences from the **Actions** icon in the global menu bar on the top of every page. View the Personalize Default Navigation Settings Quick Reference Guide for more information.



This Quick Reference Guide provides a high level overview of the purchasing analytics reports.

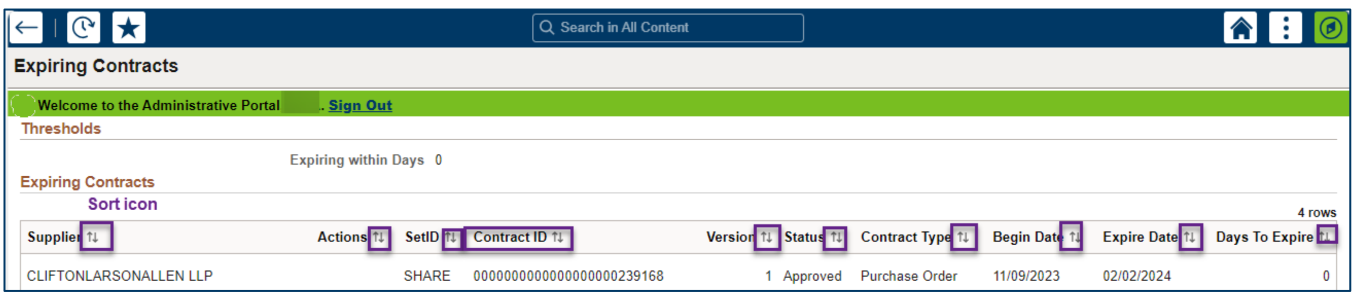
Access the Purchasing Analytics page to use the reports

Navigation Option	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchasing Analytics, Purchasing Analytics page defaults.



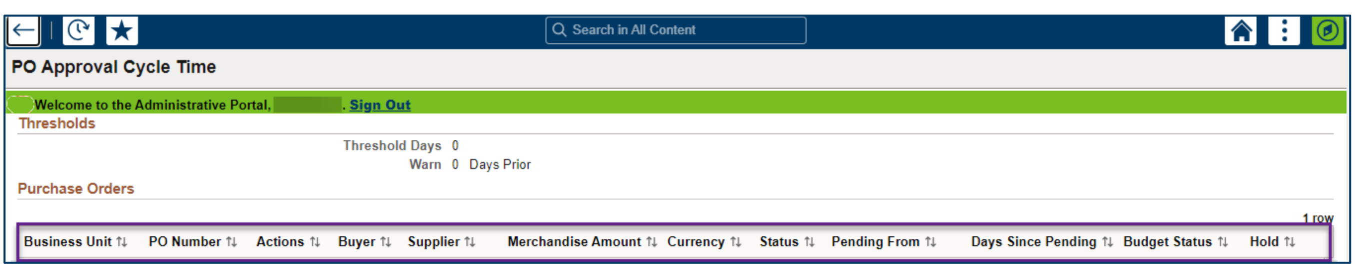
1. Expiring Contracts

The Expiring Contracts report provides a list of contracts that expire based on the thresholds you establish. You can see the Contract ID. You can sort them by selecting the Sort icon next to the title.
NOTE: You can designate these thresholds using My Preferences from the Action icon in global header.



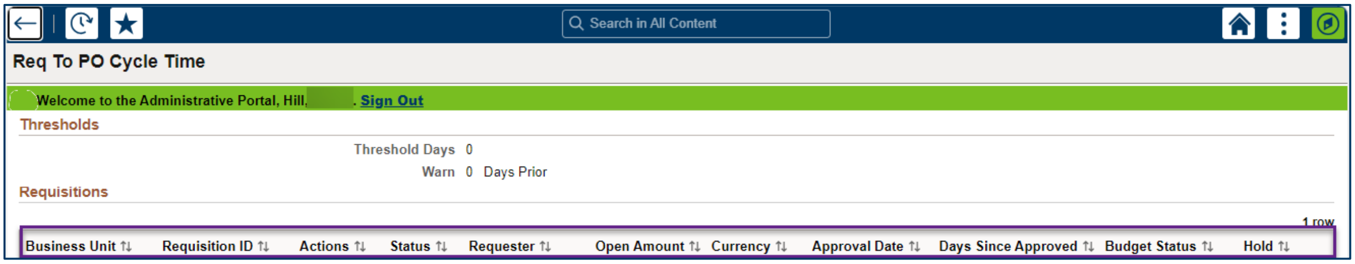
2. Purchase Order Approval Cycle Time

Use the PO Approval Cycle Time report to monitor purchase orders pending approvals equal to or exceeding the specified thresholds. You can sort them by selecting the Sort icon next to the title.
NOTE: Use My Preferences from the Action icon in global header to select and customize your view of the data.



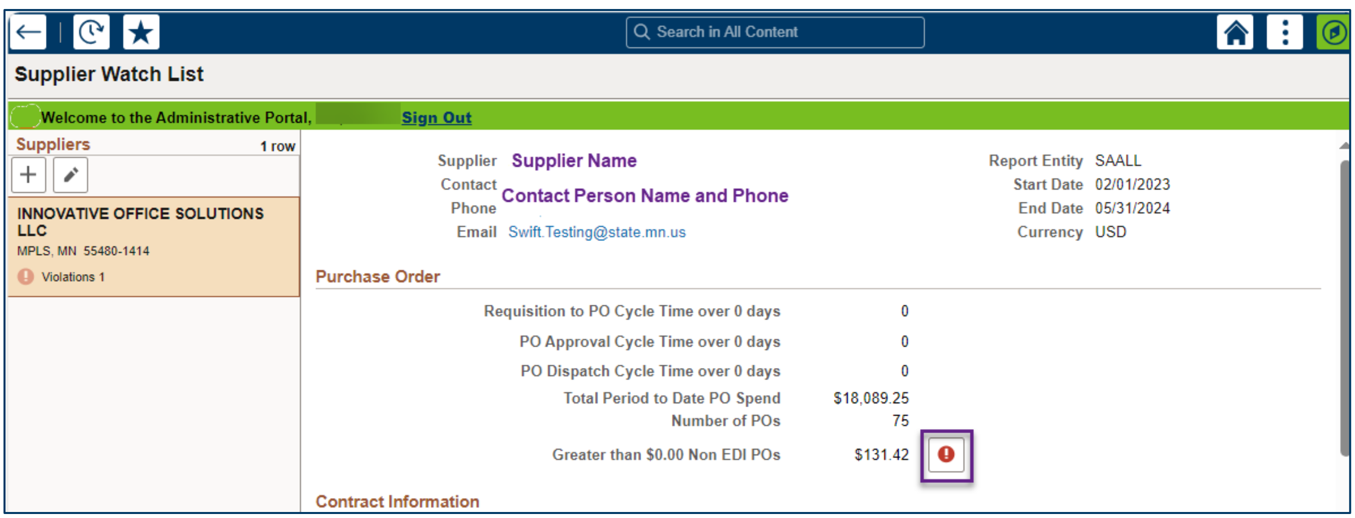
3. Requisition to Purchase Order Cycle Time

Use the Req to PO Cycle Time report to monitor approved requisitions with remaining items to be sourced to a purchase order exceeding the specified thresholds. You can sort them by selecting the Sort icon next to the title. **NOTE:** Use My Preferences from the Action icon in global header to select and customize your view of the data.



4. Supplier Watch List

Use the Supplier Watch List report to compare metrics among suppliers on your watch list such as all suppliers or just one supplier. You can create, customize and save analytic reports. If you press the **Information** icon, SWIFT will open an additional window with the details. It is a red circle with an "!" in it.



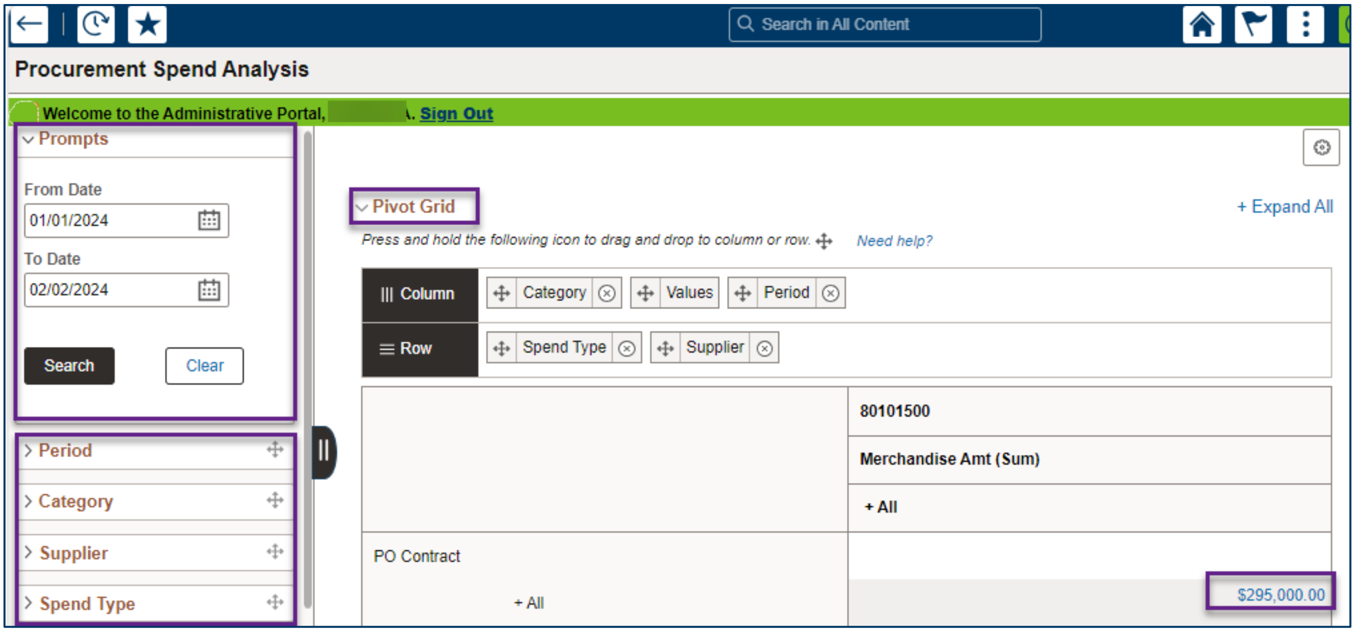
5. Procurement Spend Analysis

Use the Procurement Spend Analysis report to analyze purchase order spend detail summarized in a pivot view. You can reorganize the data based on what you need.

- On the Prompt section, select range of data by selecting specific values such as Period, Buyer or Ship To. Press the Search button.
- You can analyze pivot data by dragging and dropping prompt titles into the columns and rows at the top of the page.

- Select the link of the dollar amount to see transaction details, as needed.

SWIFT displays the details of the transaction such as the Supplier ID, Purchase Order ID, Buyer Name, Date and Merchandise Amount.



6. Payment Spend Analysis

Use the Payment Spend Analysis to compare the total amount paid based on search terms such as date prompts, Supplier ID, Payment Month, Category, and Buyer.