SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2023

Introduction to the EProcurement Module

This introduction guide will help agency staff who use the EProcurement module to understand its unique features and to avoid issues.

IMPORTANT! Carefully follow the steps from the updated EProcurement/Requisitions quick reference guides to create and process requisitions.

General Overview

Tips

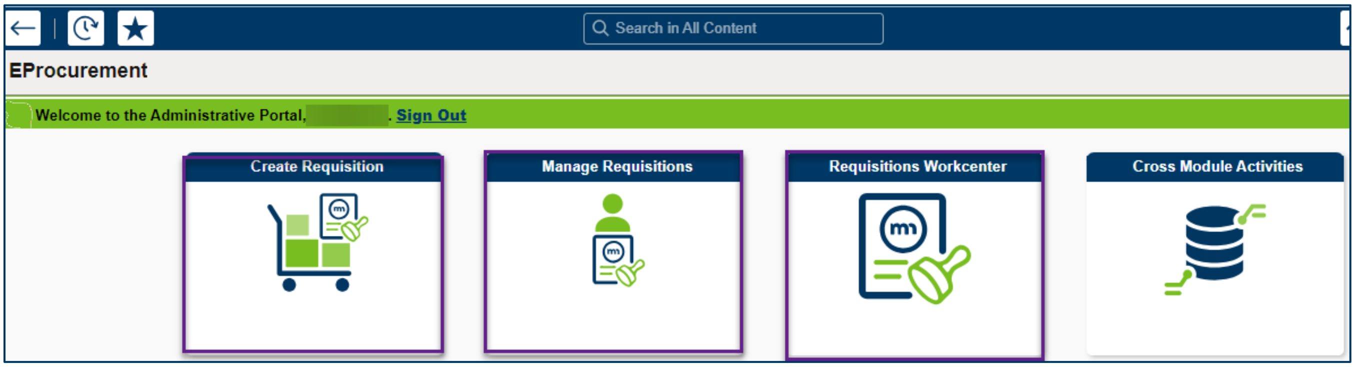
- When working on a requisition, do not work in any other SWIFT window until you complete the requisition.
- Be sure to read any messages that appear and respond appropriately.
- Wait until the processing banner closes before proceeding. If you don't, you may receive a message about a "Null Error." You will need to close the browser and start over.
- If you deviate from the steps in the EProcurement reference guides, you may get errors requiring you to start over.
- If you are getting errors, clear your cache and restart the process. Refer to the Clear Browsing Data and History quick reference guide.

Topics covered in this guide

1. Tile navigation and page functionality
2. The Actions menu on the global header
3. The Lookup menu including using operators
4. Use Accounting Tags templates to add new distributions
5. Use the Mass Change process to change distribution lines
6. The Document Type may be locked due to previous items in the Shopping Cart

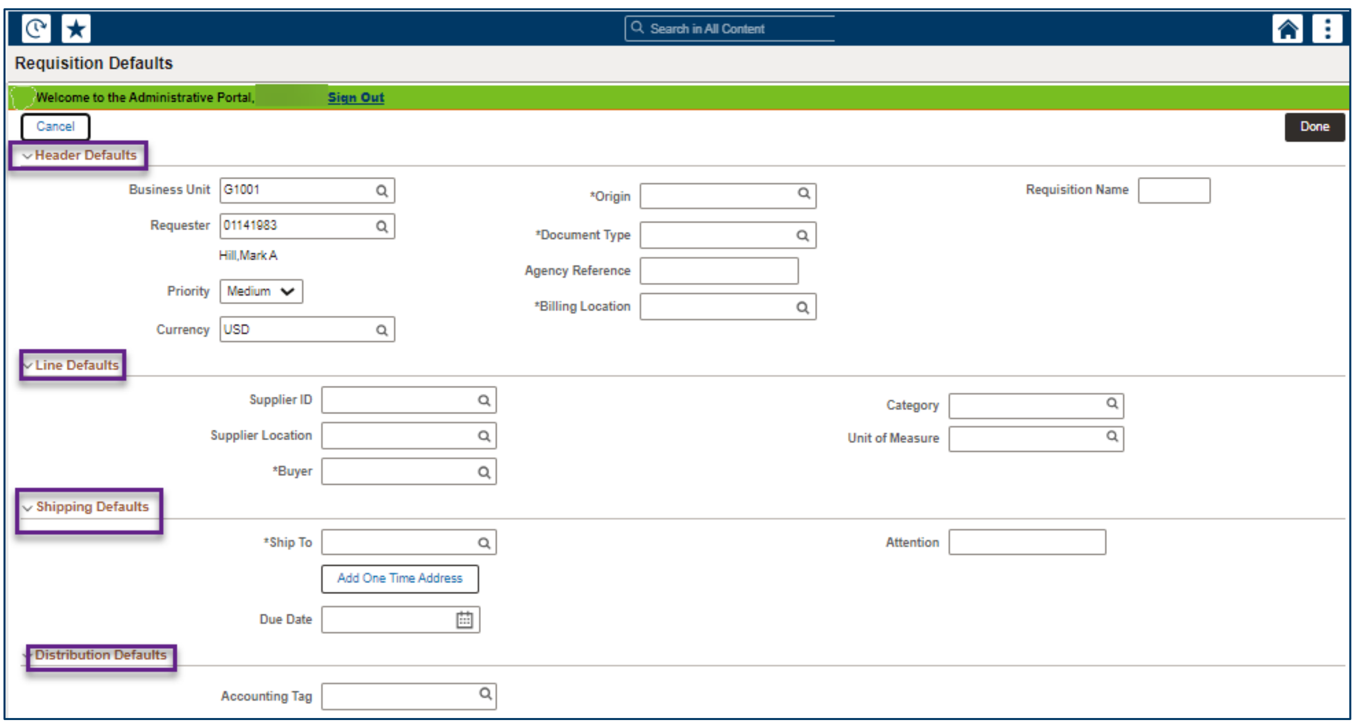
1. Tile navigation and page functionality

When you sign into the Administrative Portal, you will select the **Procurement** tile to access the EProcurement module. Then, select the **EProcurement** tile in the EProcurement page. The EProcurement page has separate tiles to create and manage requisitions.



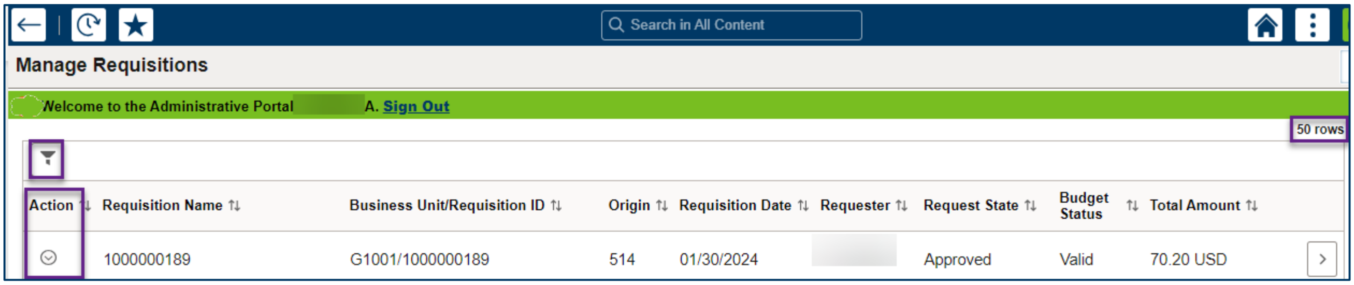
Create Requisition tile

Select the **Create Requisition** tile to access the Requisition Defaults page. Use this page to create and process new Contract Encumbering Order (CEO), Catalog Punchout Requisition (CTR), Inventory Requisition (INV), and Open Market Requisition (OMR) requisitions. Enter required information in the Header, Line, Shipping, and Distribution Default sections.

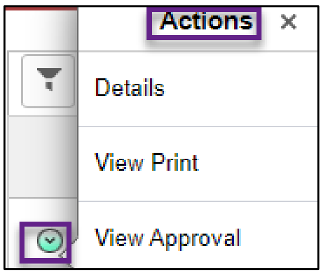


Manage Requisitions tile

Select the **Manage Requisitions** tile to access the Manage Requisitions page. You will see a list of requisitions. You will see a Filter icon at the top left of the table. It looks like a funnel. Use it to update the list of requisitions that appears on this page.



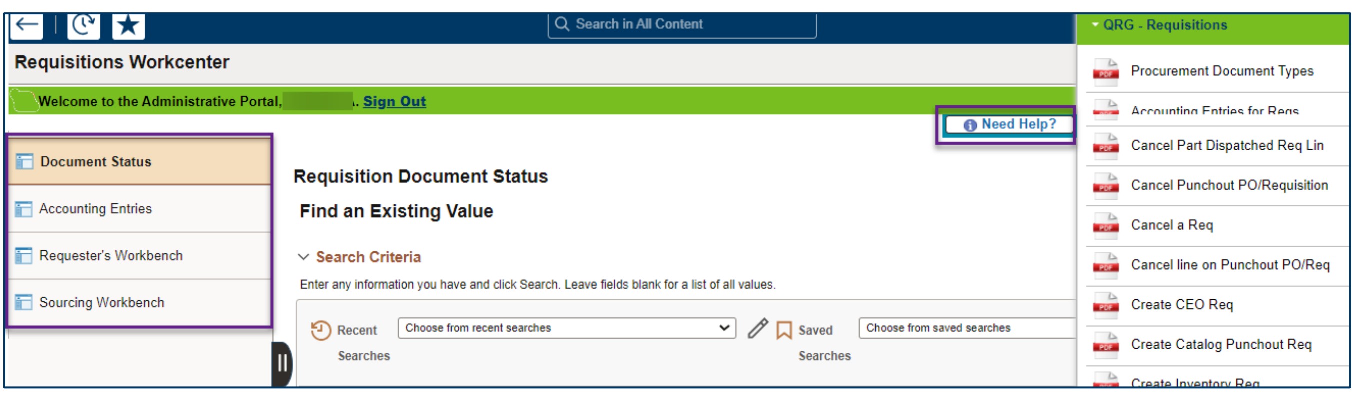
You will also see an **Action** icon to the left of an individual requisition line. It is a green circle to the left of a line. Select it to access the menu of actions you can take on an individual requisition.



Requisitions Workcenter tile

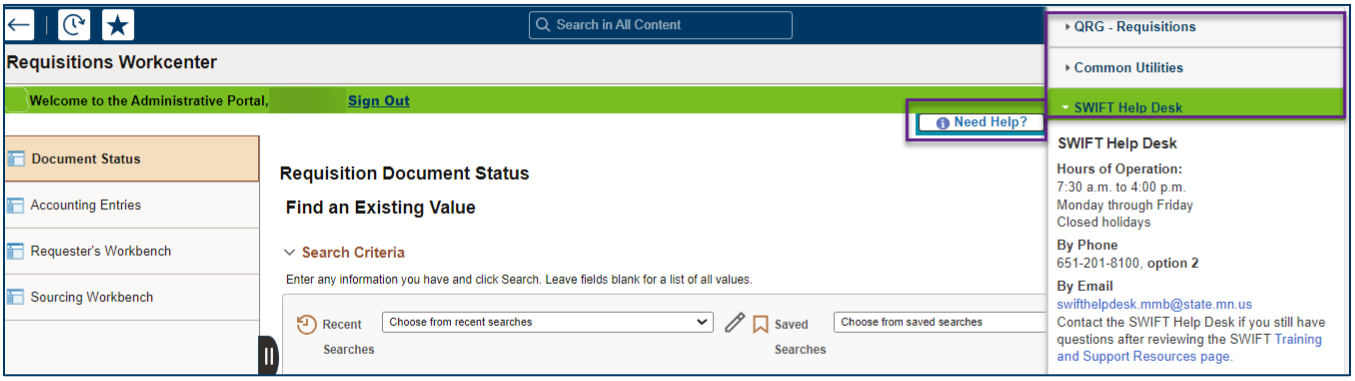
The Requisitions Workcenter tile is a one-stop shop with access to several pages within a module, including frequently used pages, queries, and reports. This Requisitions Workcenter has four main menu options that are listed on the left side of the page. When you select an option on the left, the selected page opens.

Once you are in any of these options in the Requisitions Workcenter, you can access the **Need Help?** button.



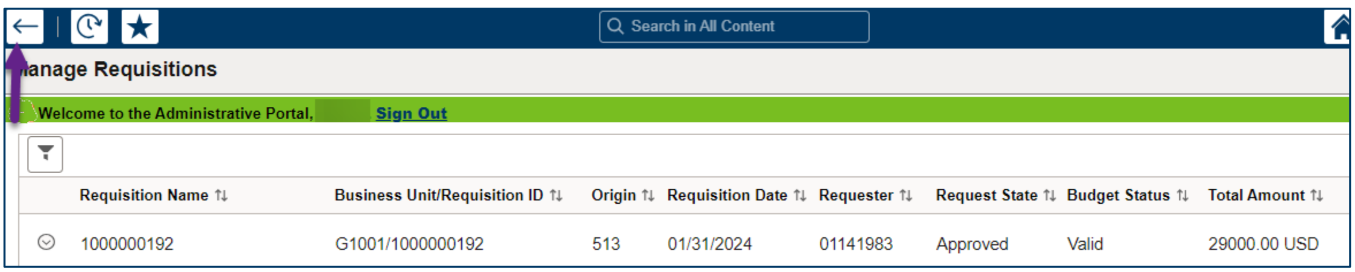
The Need Help? page brings you to the Quick Reference Guides for this module. It is called **QRG - Requisitions**.

- You can also open the **Common Utilities** section to access the Query Viewer for reports.
- And you can access the **SWIFT Help Desk** contact information.
- Make sure to select the **Need Help?** button to close this window.



Navigating to previous pages

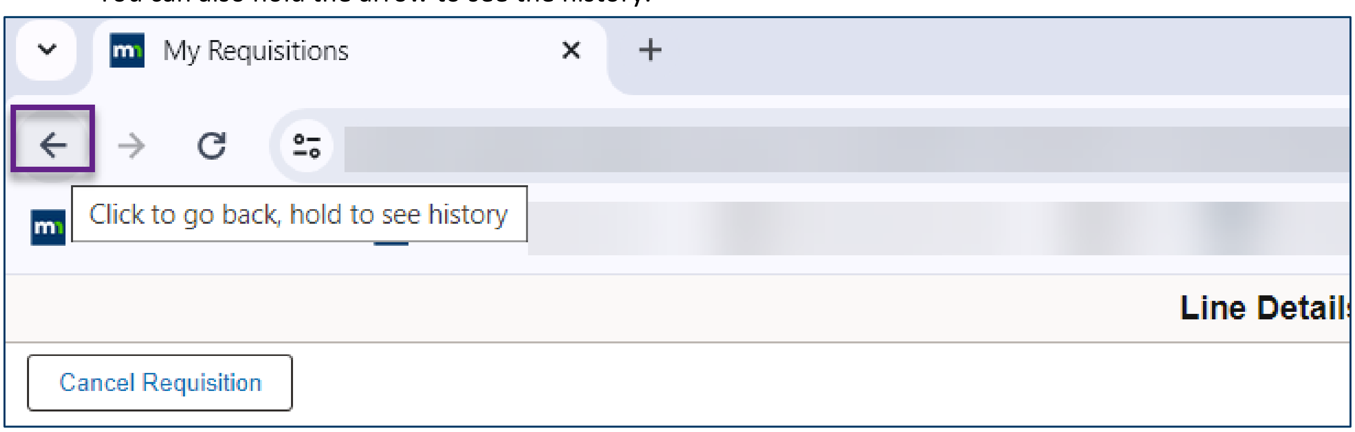
When you are in a page in the EProcurement module and select the **back arrow** on the global menu, SWIFT will bring you to the EProcurement main page. You will lose any unsaved data from the previous page.



SWIFT returns you to the EProcurement page.

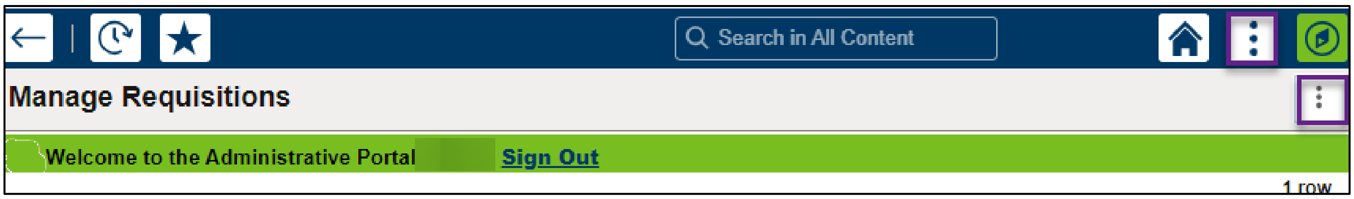
Also, if you select the **back arrow** from the browser, you have options.

- You can click the arrow to go back to the EProcurement page. You will lose any unsaved data from the previous page.
- You can also hold the arrow to see the history.

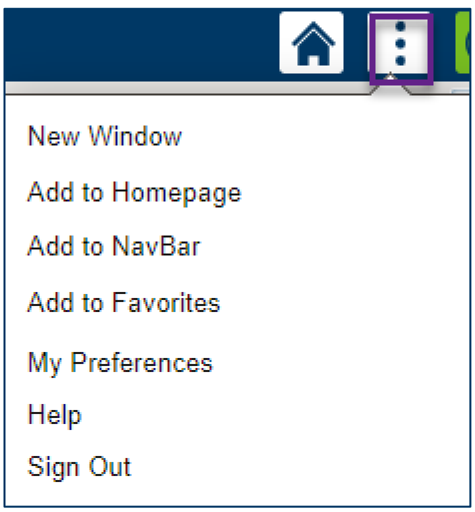


2. The Actions menu on the global header

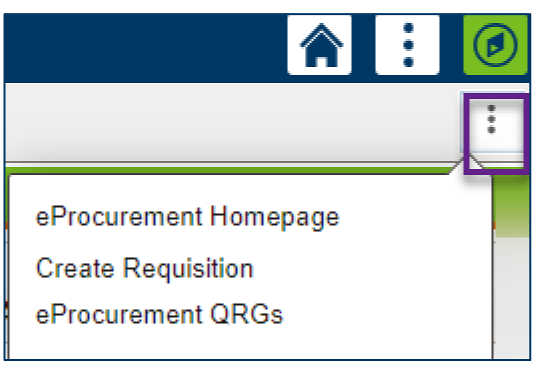
When you are in the Requisition Defaults or Manage Requisitions page, you'll notice two banners on the global header: the blue banner and the gray page title banner. Each one has an Actions icon, which has three dots



(1) In the blue banner of the global menu, the Actions menu allows you to add this page to your Homepage, NavBar, Favorites and take other actions.



(2) In the gray banner, the Actions menu allows you to navigate to other pages in the EProcurement module.



eProcurement Homepage

The eProcurement Homepage serves as navigation to the EProcurement page with the tiles.

Create Requisition/Manage Requisitions

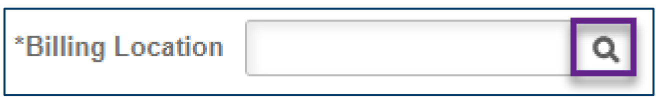
If you are in the Create Requisitions page, selecting this option brings you to the Manage Requisitions page. If you are in the Manage Requisitions page, selecting this option brings you to the Create Requisition page.

eProcurement QRGs

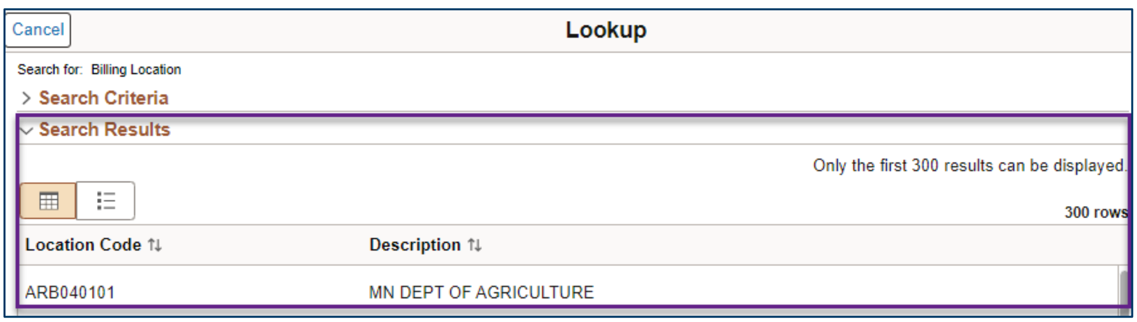
This option brings you to the Minnesota Management and Budget's EProcurement/Requisitions quick reference guides web page in a separate window.

3. Lookup menu in SWIFT fields

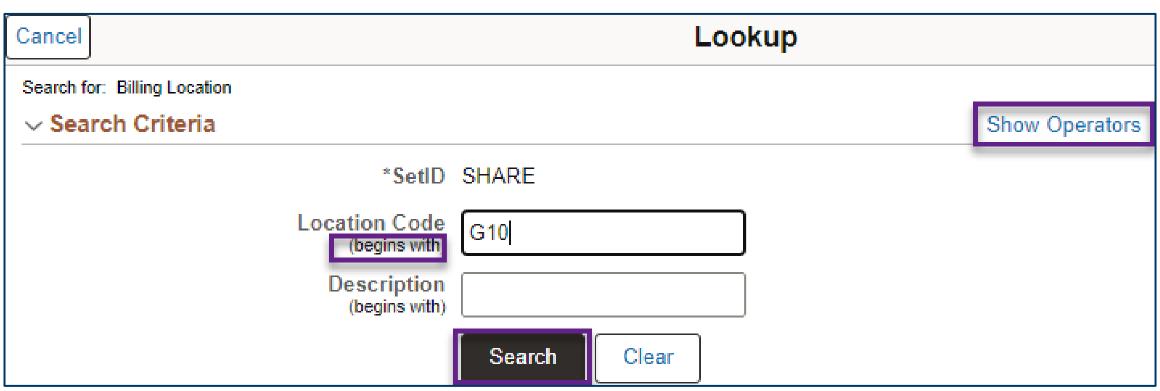
When you are in a requisition page and need to look up a field, select the **Lookup** icon.



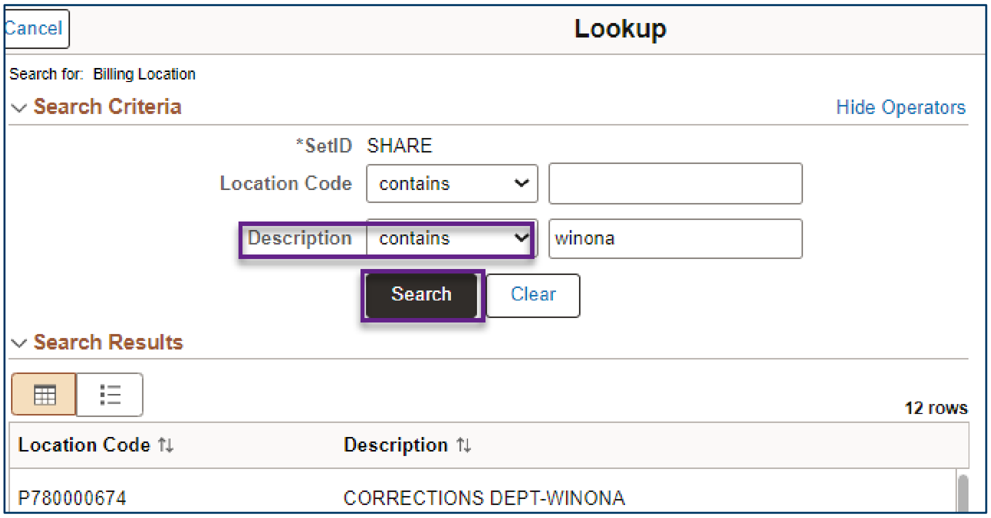
SWIFT displays the Lookup menu. In the Search Results section, you can see a table with the field name and a description. You can see how many rows are listed on the far right of the table.



If you don't see what you need, select **Search Criteria** section. SWIFT opens it up in a new window. If you know the exact term or description, enter it in the **Location Code** and/or the **Description** fields. Select **Search.** The "begins with" operator defaults.

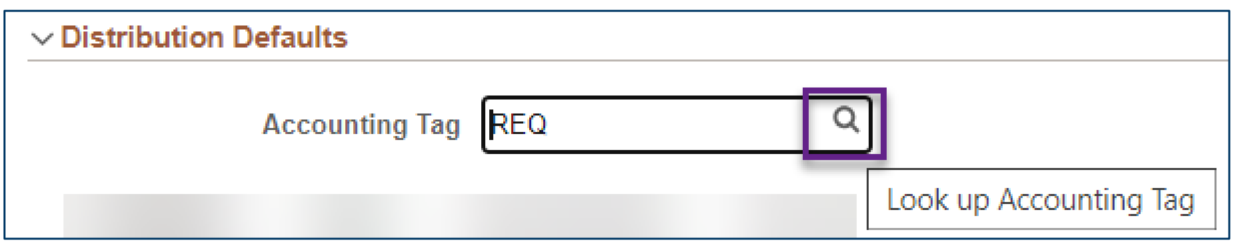


You can update the operators using the **Show Operators** link at the top right of the Lookup window. You can change the operators in the search boxes such as “contains.” Enter search criteria. Select **Search**. SWIFT updates the Search Results table with the new options.



4. Accounting Tags templates

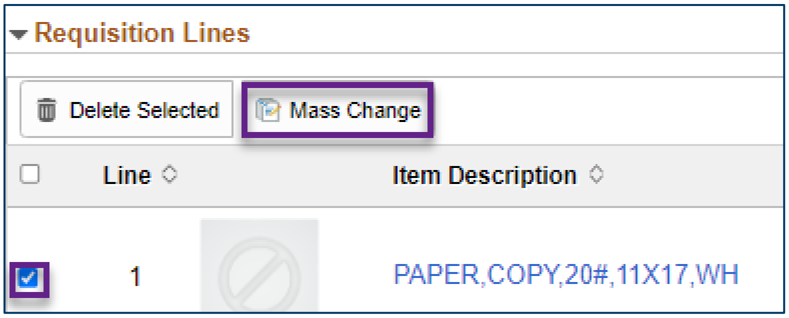
Use Accounting Tag templates to add distribution lines in creating a new requisition or updating an existing one. There are nine templates starting with “REQ” that are available for adding up to ten distributions.



Follow the steps for creating a requisition by Document Type. You can find the quick reference guides for them on the [EProcurement/Requisitions] webpage.

5. Use the Mass Change process to change distribution lines

The Mass Change process allows you to make changes to multiple distribution lines using one process on an existing requisition.



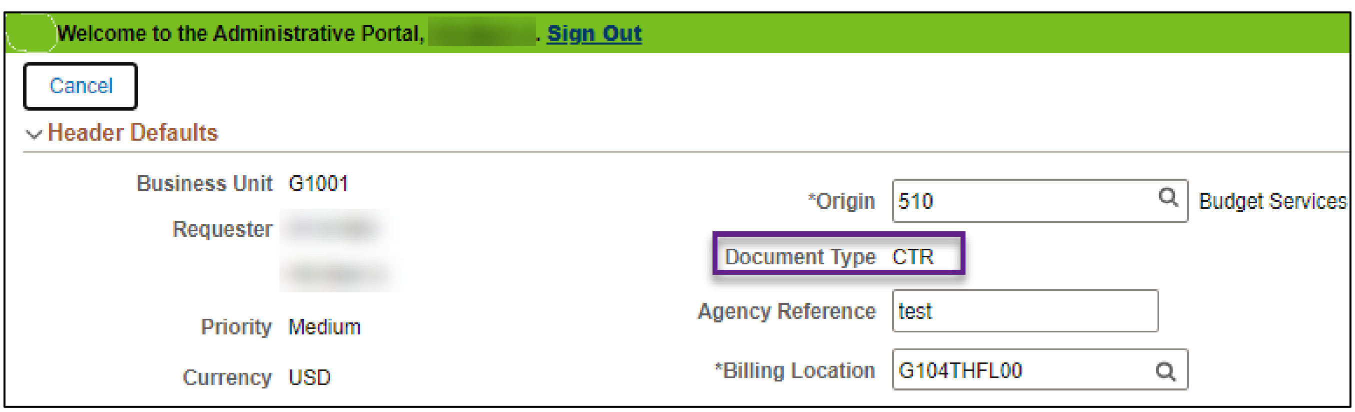
Use the Edit a Requisition quick reference guide for the full steps on using the Mass Change button for creating or editing a requisition.

6. The Document Type may be locked due to previous items in the Shopping Cart

Once you place items in the Shopping Cart, they remain in it until you submit the requisition or delete the items. You cannot change the Document Type the next time you want to create a new requisition if you have items in the cart.

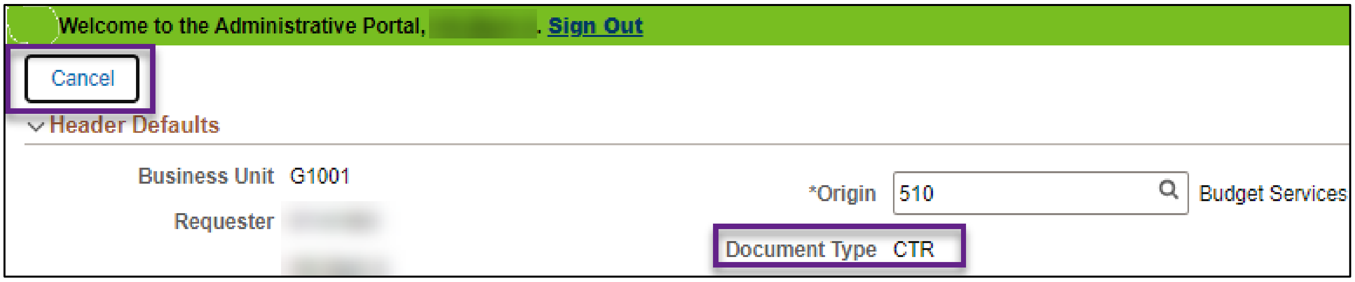
For example, you create a new requisition, add items to the Shopping Cart, and do not save the requisition before navigating to another page. When you start over on the Create Requisition page, SWIFT locks the Document Type on this new requisition. You cannot edit it because there are items in the Shopping Cart from the previous attempt to create a requisition.

You need to delete or process these items to completion.

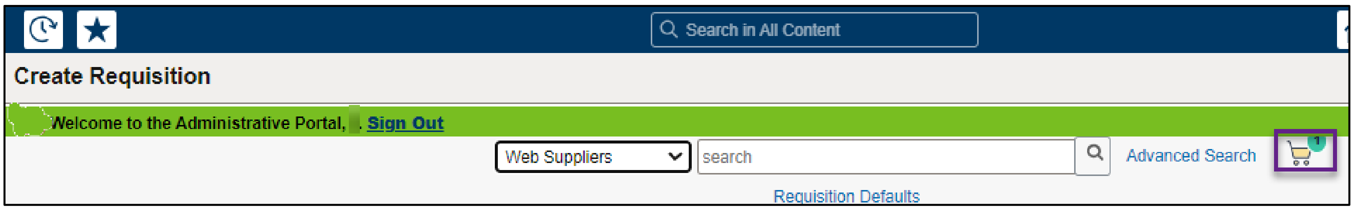


Steps to proceed with items in the Shopping Cart

- On the Requisitions Defaults page, select **Cancel** in the top, left corner.



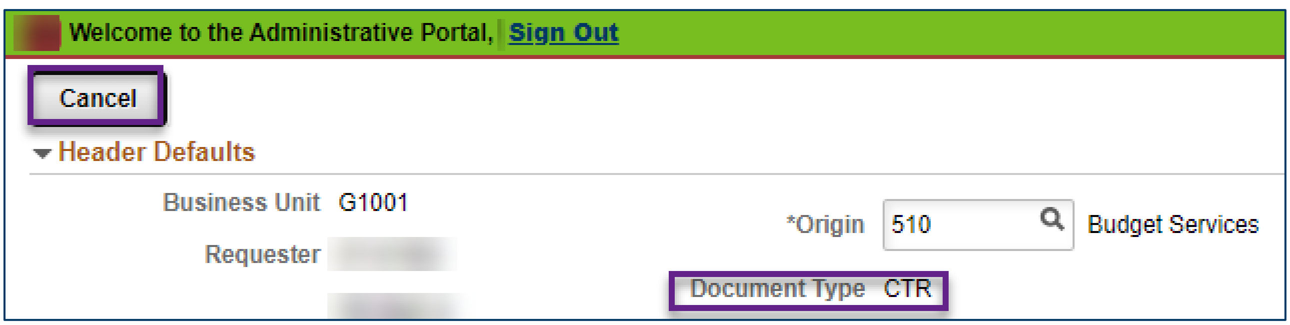
- SWIFT brings you to the next page, which allows you to select items for the requisition.



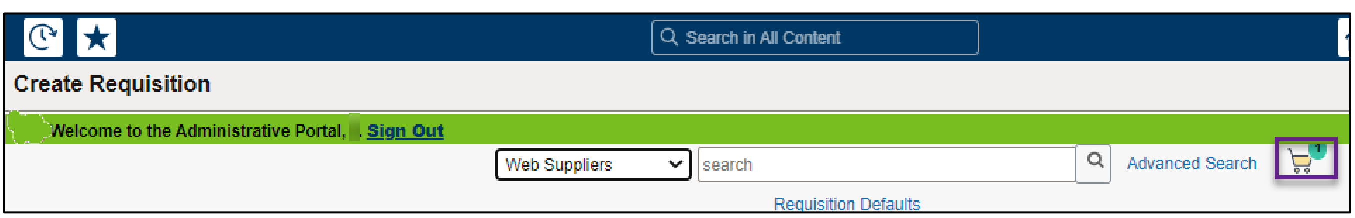
- Proceed with processing the items in the Shopping Cart.

Steps to delete items in the Shopping Cart

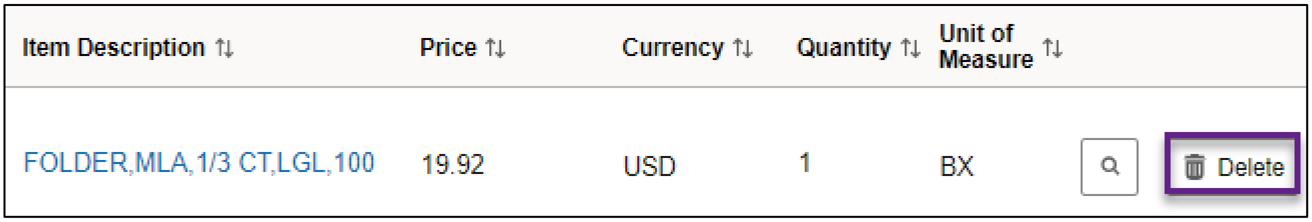
- On the Requisitions Defaults page, select **Cancel** in the top, left corner.



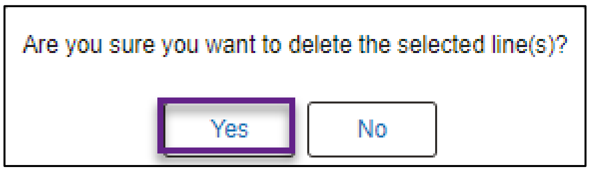
- SWIFT brings you to the next page, which allows you to select items for the requisition. Select the **Shopping Cart** icon.



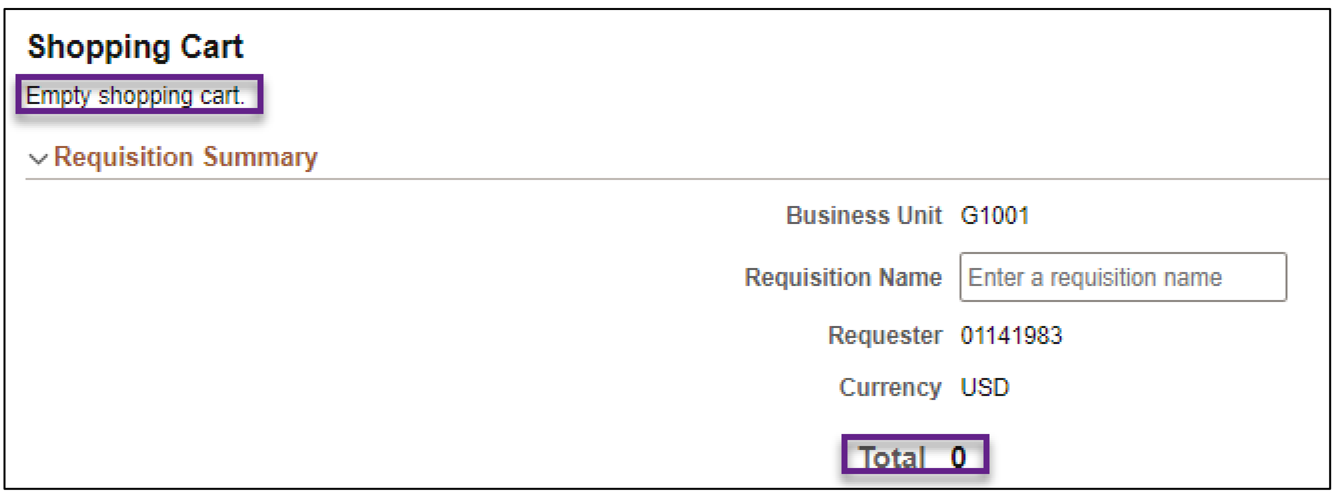
- SWIFT displays the Shopping Cart page. Select the **Delete** button at the end of each line.



- Select **Yes** in the message.



- SWIFT brings you to the updated Shopping Cart page. The Total field says "0." Do not update anything on this page.



- You have deleted the Shopping Cart. Return to the Create Requisition tile to create a new requisition.