SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create and Use an Inventory Requisition Template

A requisition is an internal document that agencies use to request a purchase. Use the eProcurement module in SWIFT to create and process requisitions. Do not dispatch the requisition to suppliers. Agencies can use SWIFT's eProcurement module to withdraw the items they keep in stock in a warehouse. Currently only a few agencies create inventory requisitions to order their materials from their warehouses.

Agency staff can set up multiple personal templates for inventory requisitions. Templates are a list of items that can be pulled into a requisition as a group, rather than searching for each item and individually entering it. These templates make it easier to place repetitive orders for the same items.

This guide explains these processes:

1. Create a template for an Inventory requisition
2. Use a template for an Inventory requisition

This guide does not discuss the details about creating and processing inventory requisitions.

Steps to create an Inventory requisition

- Step 1: Enter information on the Requisition Settings page
- Step 2: Enter information on the Create Requisition page
- Step 3: Review and submit the requisition

Steps to use a template to create an Inventory requisition

- Step 1: Enter information on the Requisition Settings page
- Step 2: Add inventory items on the Create Requisition page
- Step 3: Save, submit and budget check the requisition

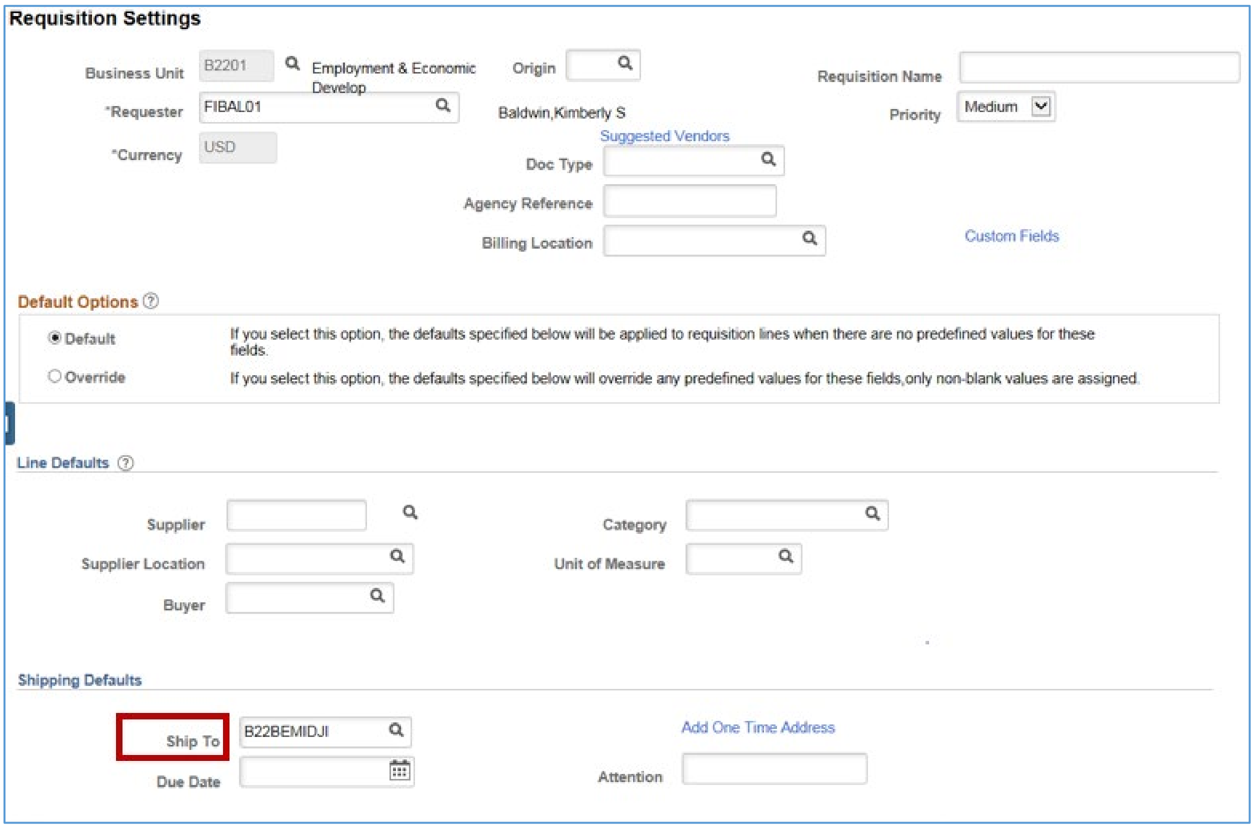
Steps to create an Inventory requisition template

Step 1: Enter information on the Requisition Settings page

1. Navigate to the **Requisition Settings** page in the eProcurement module.

Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions, Create Requisitions, Requisition Settings page.

2. Enter the *Ship To* location on the **Shipping Defaults** information in the **Line Defaults** section.

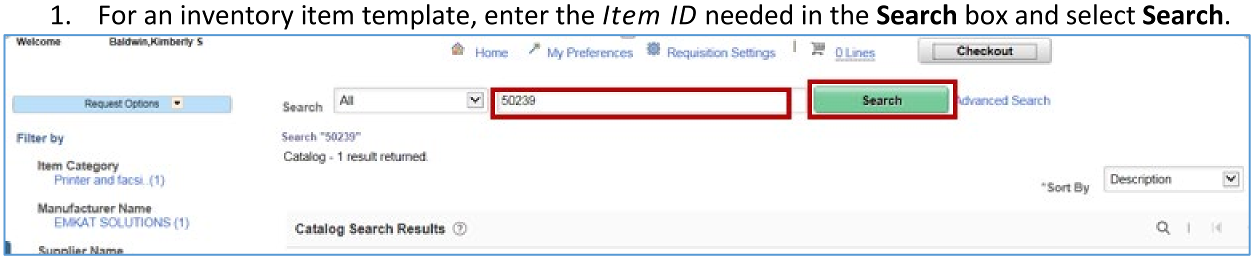


Go to the bottom of the page and press **OK**.

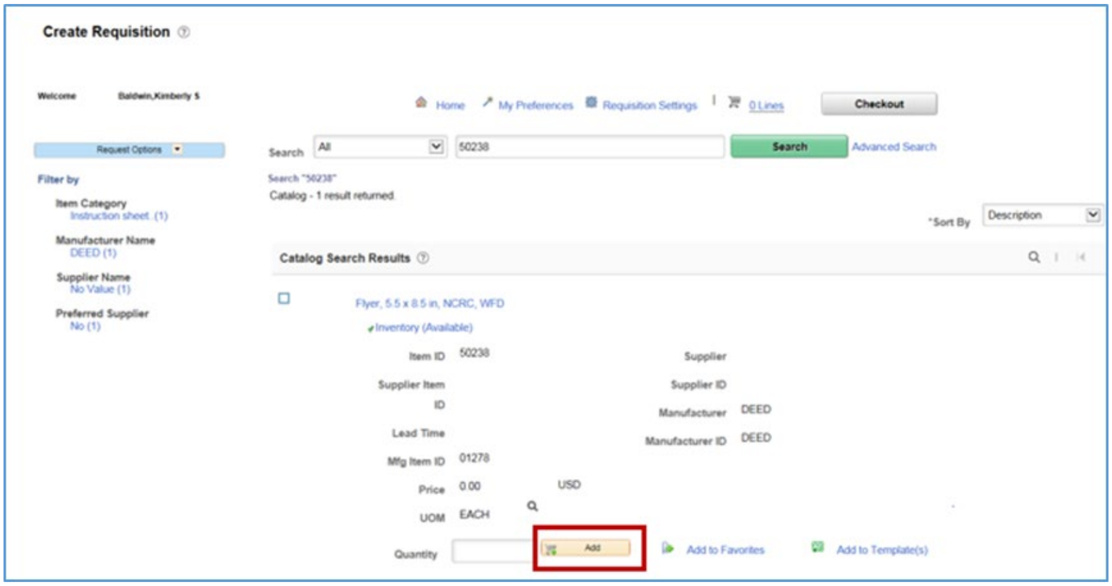
Step 2: Add inventory items on the Create Requisition page

SWIFT displays the **Create Requisition** page.

1. For an inventory item template, enter the *Item ID* needed in the **Search** box and select **Search**.

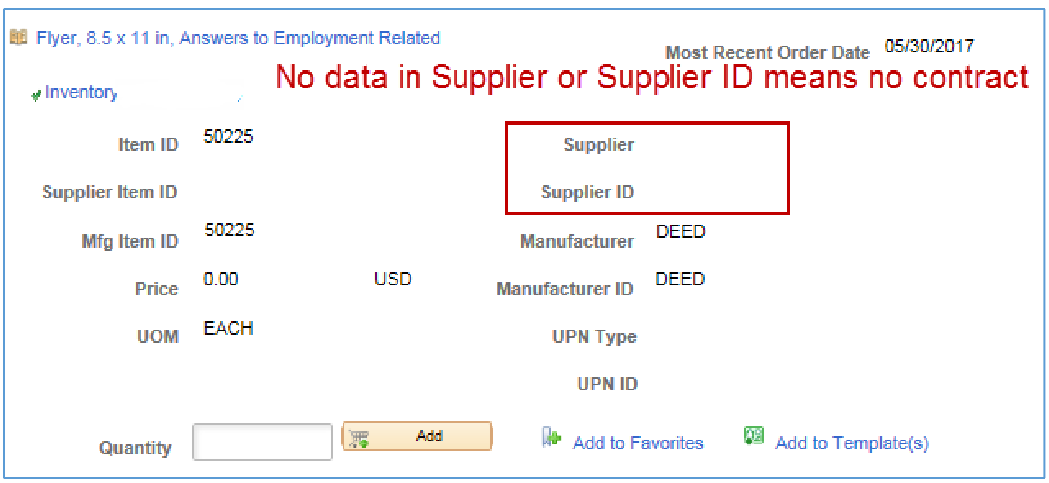


SWIFT returns catalog lines with that *Item ID*.



As a best practice when creating a template, enter “1” in the *Quantity* field.

- **IMPORTANT:** Make sure to choose a line that does not have a contract associated to it.
  - There should be no data on the *Supplier* or *Supplier ID* fields.
  - Otherwise, SWIFT will not allow you to use the template on a new requisition.
- Then, select the **Add** button.



- Repeat the search to add as many items as required. SWIFT updates the **Shopping Cart** at the top of the page with your inventory items.

2. When you are ready to complete the template, press the **Checkout** button at the top of the page.

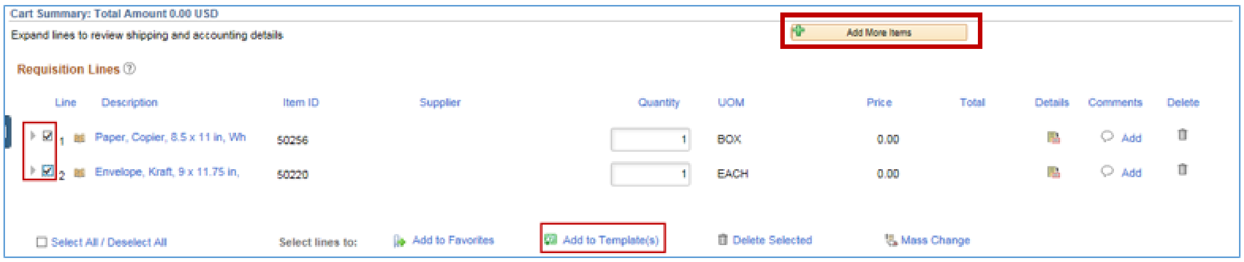
Step 3: Review and create the template

1. SWIFT opens up the **Checkout – Review and Submit** page.

- Review the **Cart Summary** section. You can add more inventory items if needed by using the **Add More Items** button.

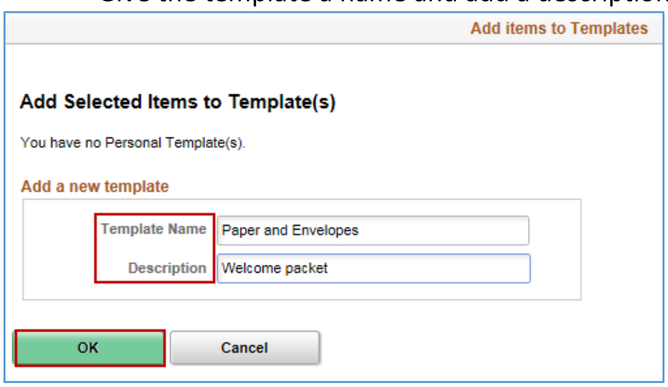
2. On the **Cart Summary** section, add items to a template.

- Check the box next to the items to add to a template. Then, press the **Add to Template** link.



3. SWIFT displays the **Add items to Templates** page.

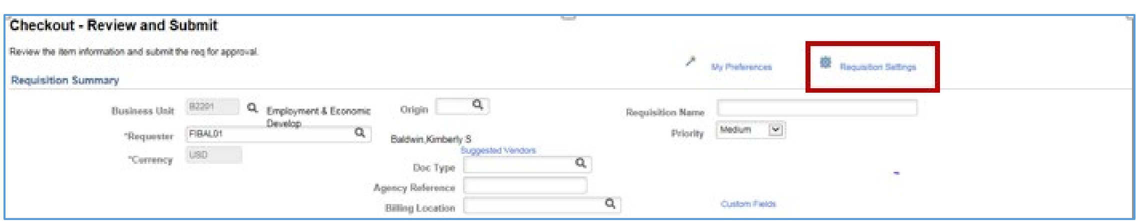
- Give the template a name and add a description. Press **OK**.



4. SWIFT returns you to the **Checkout – Review and Submit** page.

- Save the requisition or exit the page to save the template.
- If you want to use this requisition, add requisition header information and ChartField information by selecting the **Requisition Settings** link and populating the required fields. Select the **Save & submit** button and budget check the requisition.

SWIFT will save the new template whether or not the inventory requisition is saved.



You have successfully created an Inventory Requisition template for inventory items.

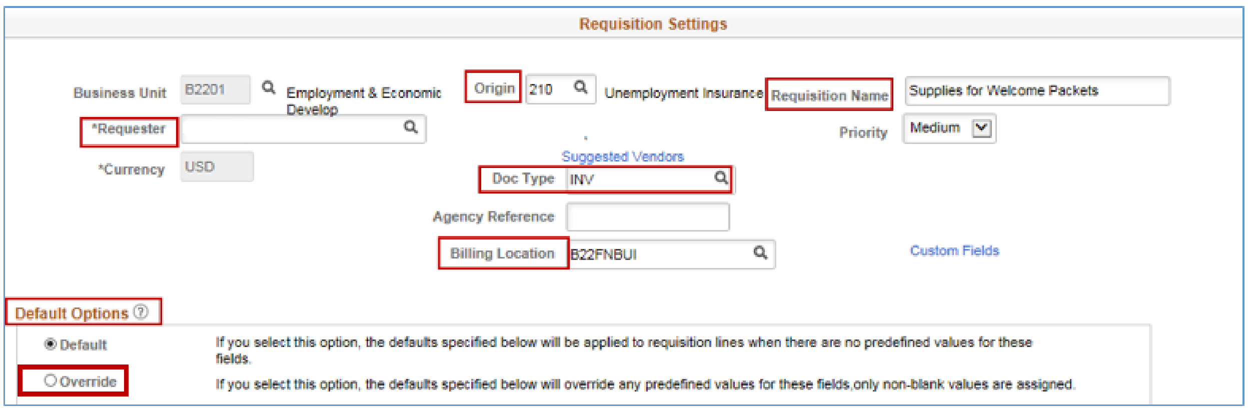
Use a template to create an Inventory Requisition

Step 1: Enter information on the Requisition Settings page

1. Navigate to the **Requisition Settings** page in the EProcurement module.

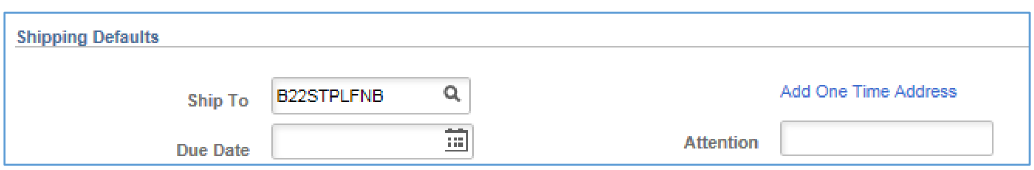
Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions, Create Requisition, Requisition Settings page.

2. On the **Requisitions Settings** page, specify the *Requisition Name, Requester, Origin, Billing Location* and other information that applies to the entire requisition. The *Doc Type* must be "INV".

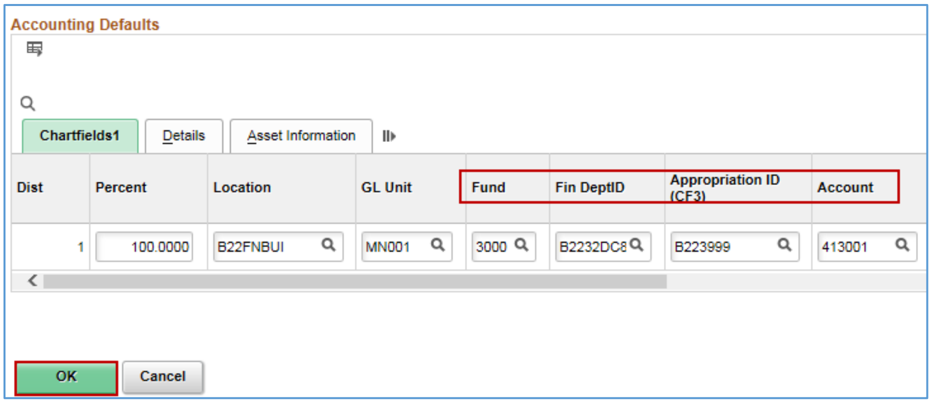


3. Confirm or enter information as needed.

- Select the **Override** button on the **Default Options** section to default information entered in the **Requisition Settings** onto the requisition fields.
- Confirm or enter the *Ship To* location on the **Shipping Defaults** information of the **Line Defaults** section.



- Make sure to add Chartfield information in the **Accounting Defaults** section. Adding it here will default the Chartfields onto every requisition line.

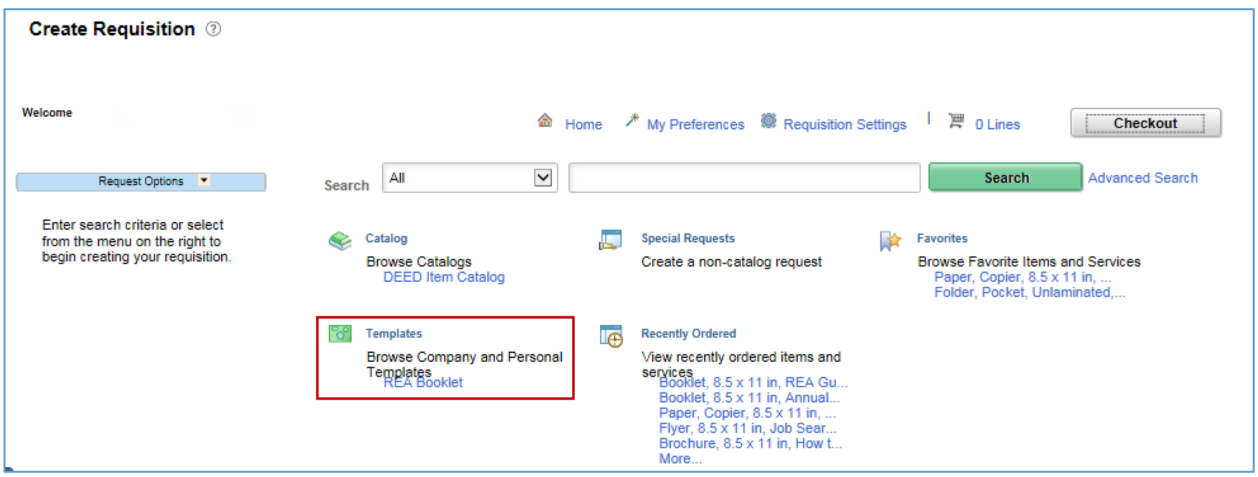


4. When you have entered the required information, go to the bottom of the page and press **OK**.

Step 2: Add inventory items from a template on the Create Requisition page

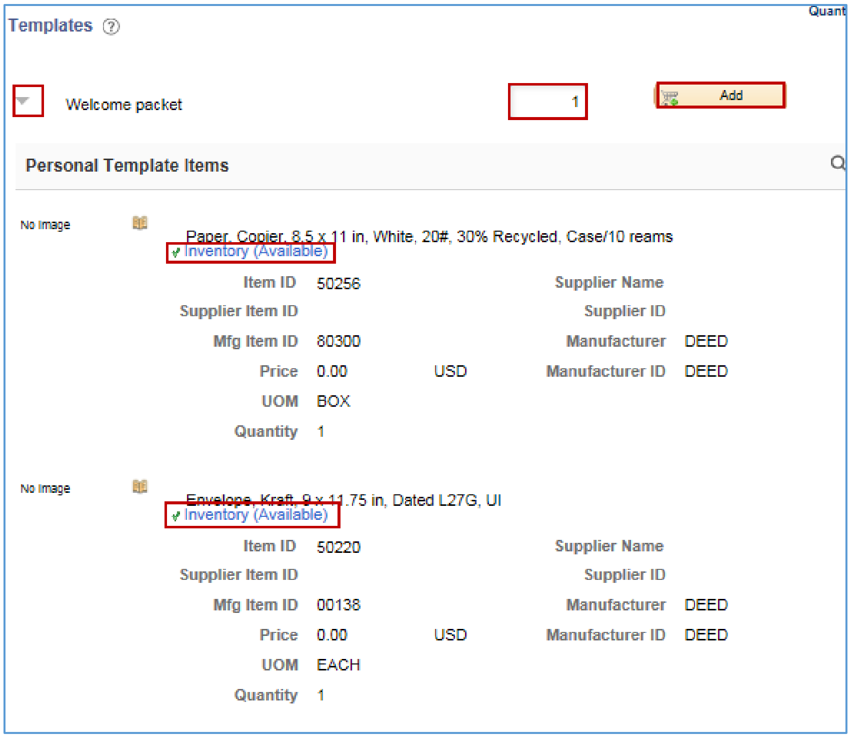
On the **Create Requisitions** page, go to the **Templates** area. You can see all of the templates you created.

1. Select the template link you wish to use.



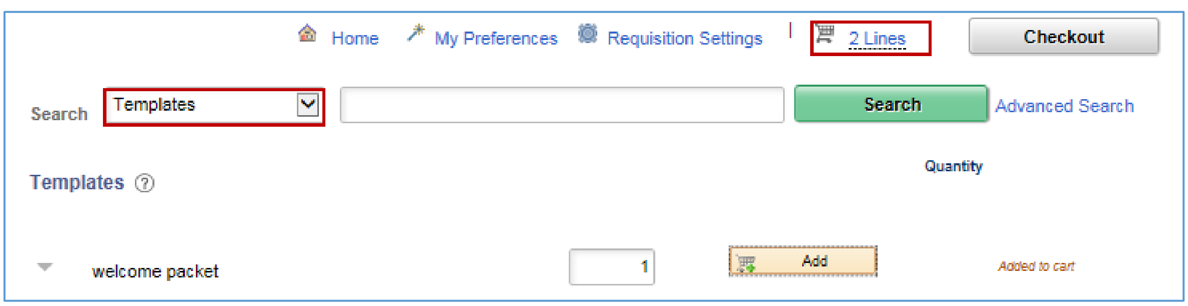
2. Press the **Expand Section** icon next to the template you wish to use. SWIFT opens up the template and displays the items in the template.

NOTE: If you hover over the **Inventory (Available)** link, you can see how many items there are in the warehouse.



3. Enter the number of items desired and select the **Add** button. If you enter “5”, you will receive five of each item on the template.

SWIFT updates the top of the **Create Requisition** page to show the number of lines (e.g., items) in your shopping cart.



4. If you need to order additional inventory items that are not in the template, search for the *Item ID* using the **Search** drop down menu.

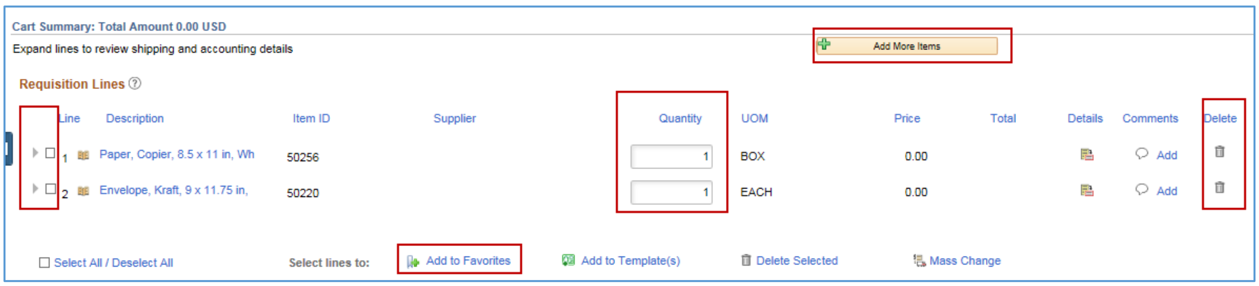
- Change the value in the dropdown menu to “All”, enter the *Item ID* and press the **Search** button.
- Add the additional item(s) to the requisition. SWIFT will not update the template, but it will add the additional items to this requisition.

Step 3: Save, submit and budget check the requisition

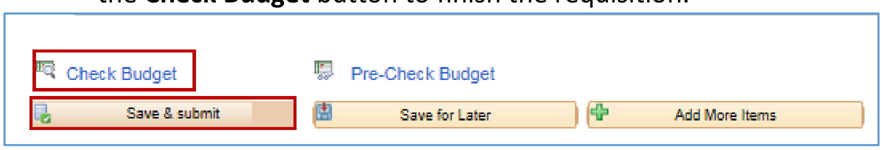
1. When you are ready to complete this requisition, press the **Checkout** button at the top of the page.

SWIFT displays the **Checkout – Review and Submit** page for your review.

- In **Cart Summary** section, you can see that the items you selected on the template appear as the individual lines on the inventory requisition.
- You can delete an individual line by selecting the check box on the line and pressing the **Delete** icon. This will not change the template but will change this individual requisition.
- You can add additional items to this requisition by pressing the **Add More Items** button. There you can search for and add additional items.
- You can also add these items to your favorites.



2. When you are ready, press the **Save & submit** button at the bottom of the page. Then, select the **Check Budget** button to finish the requisition.



You have successfully created and used a template for an inventory requisition.