SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create a New Requisition by Copying an Existing Requisition

Agencies can save time and use an existing requisition to create a new one in SWIFT's eProcurement module. You will need to add the Doc Type and Billing Location as those fields do not copy over. Make sure that the details of the requisition fit the needs of the new requisition. You can add or delete lines as required for the new requisition.

IMPORTANT: Make sure you enter the correct ChartField information on the new requisition.

This guide lists the steps to create a new requisition by copying an existing one. It does not discuss the details about creating and processing the requisition based on its document type.

Steps to complete

- Step 1: Access the requisition to copy
- Step 2: Copy from the existing requisition
- Step 3: Update the newly created requisition
- Step 4: Review and submit the newly created requisition

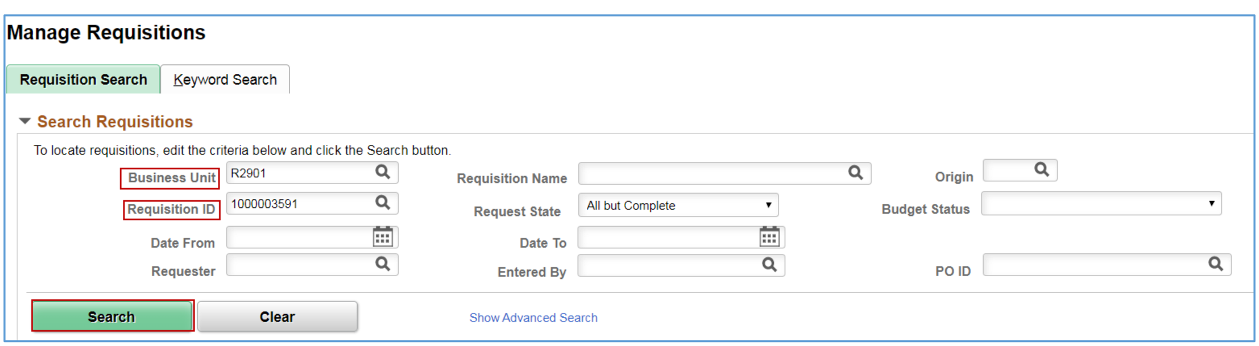
Steps to create a new requisition by copying an existing requisition

Step 1: Access the requisition to copy

1. Navigate to the **Manage Requisitions** page in the eProcurement module.

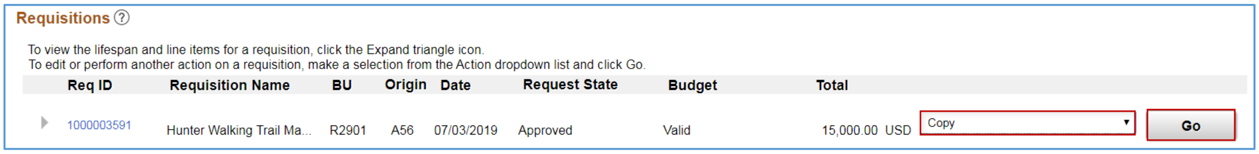
Navigation Options	Navigation Path
Navigation Collection	Procurement, eProcurement, Requisitions, Manage Requisitions page.

2. Enter the *Business Unit* and search information such *Requisition ID*. Press **Search**.

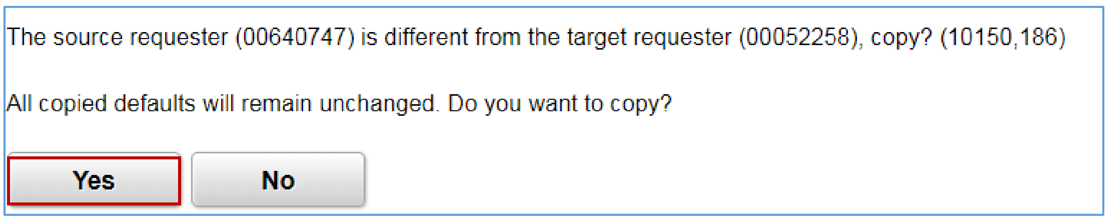


Step 2: Copy from the Existing Requisition

SWIFT opens the **Search Results** with the desired requisition. Don't select the Req ID. On the **Requisitions** results section, select "Copy". Then, select **Go**.



NOTE: If you are copying from a requisition that you did not create, SWIFT sends you a message. All copied defaults will remain unchanged. Click **Yes**, if you want to copy it.

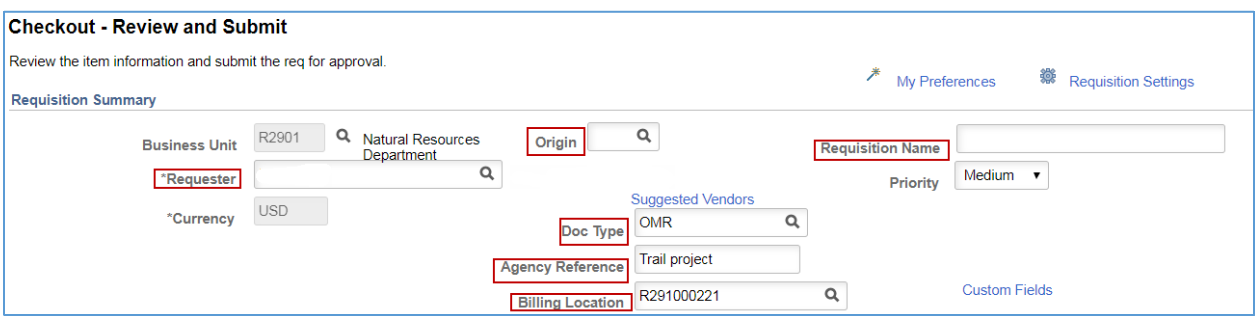


Step 3: Update the newly created requisition

SWIFT opens the **Checkout – Review and Submit** page with the new requisition.

1. Update the **Requisition Summary** section of the requisition. Confirm or update these areas to fit the new purchase request.

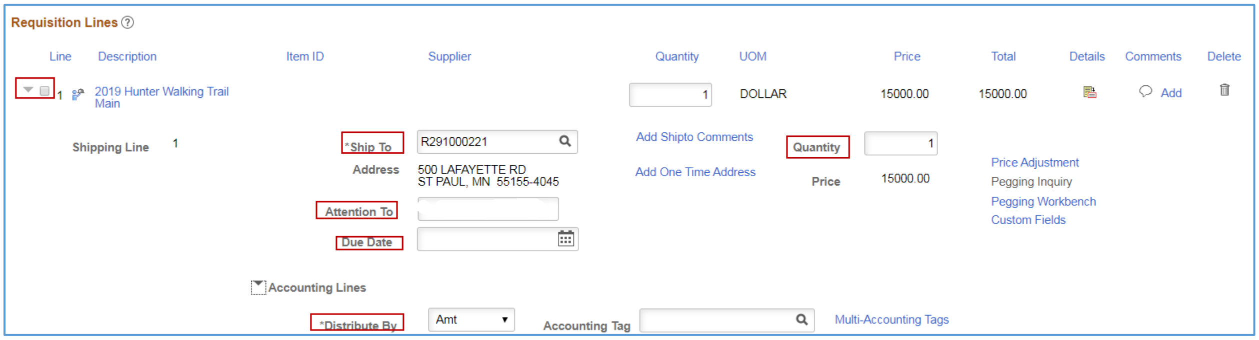
- *Origin*
- *Document Type*: SWIFT does not copy the requisition *Document Type* into the new requisition values. Select the correct requisition *Document Type* of "OMR", "CEO" or blank (for Inventory requisitions only).
- Update the *Requester, Requisition Name* and *Agency Reference* as needed.
- Update the *Billing Location*.



2. Review and update the **Requisition Lines** section.

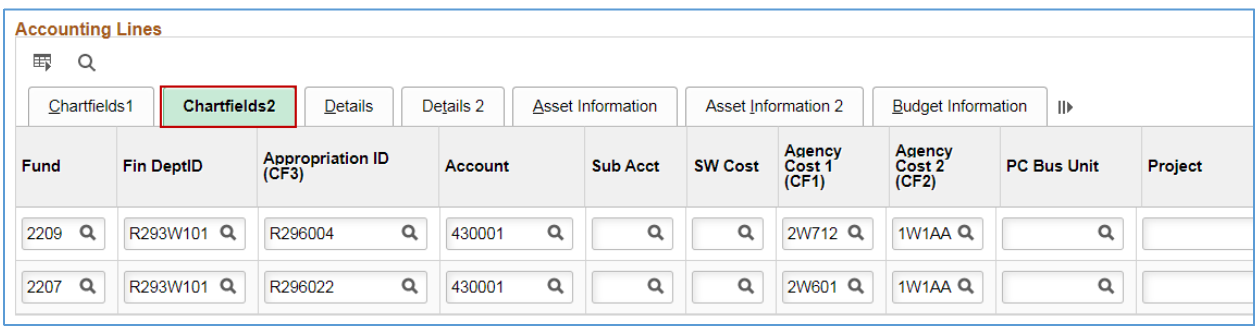
- Select the **Expand Section** icon for each line.

- SWIFT opens the line. Update these items as needed for each line.
    - Review or update the *Ship To* location for each line.
    - Review or update the *Due Date* for each line.
    - Check the *Attention To* field and add any comments.
    - Review or update the *Distribute by* field for each line.
    - Review or update the *Quantity* as needed.

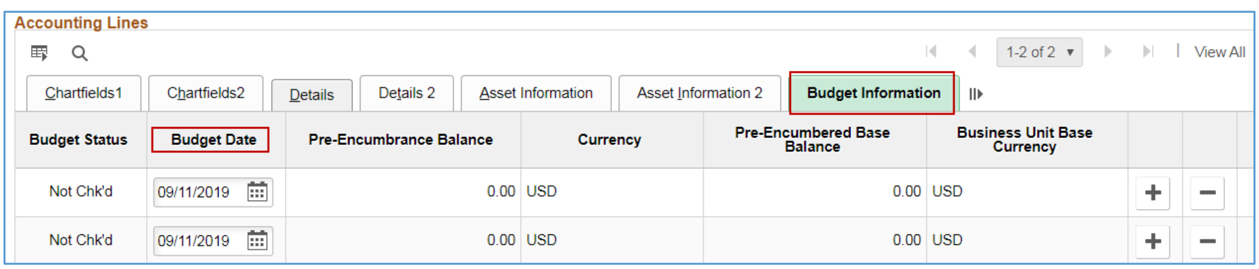


- Update the *Chartfield* information on the **Chartfields2** tab for each line.

IMPORTANT: Make sure you enter the correct Chartfield information on the requisition.

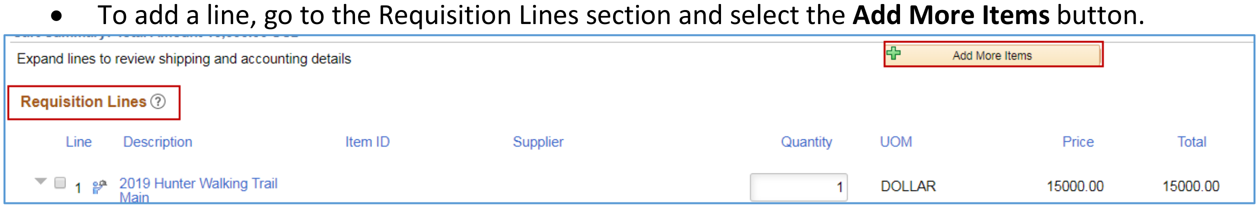


- Review the *Budget Date* on the **Budget Information** tab. Update if needed for each line.

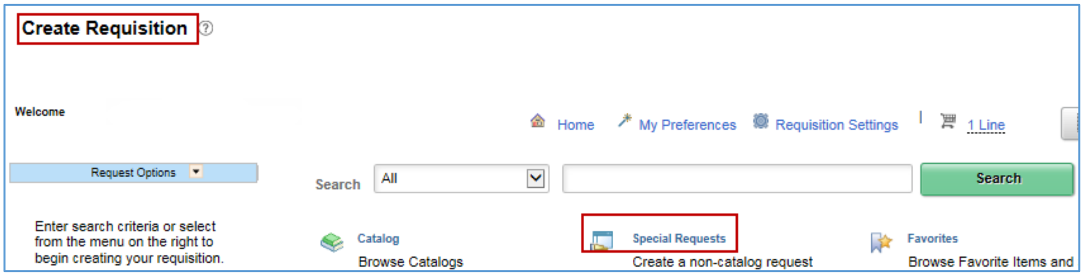


3. Add any requisition lines as needed.

- To add a line, go to the Requisition Lines section and select the **Add More Items** button.

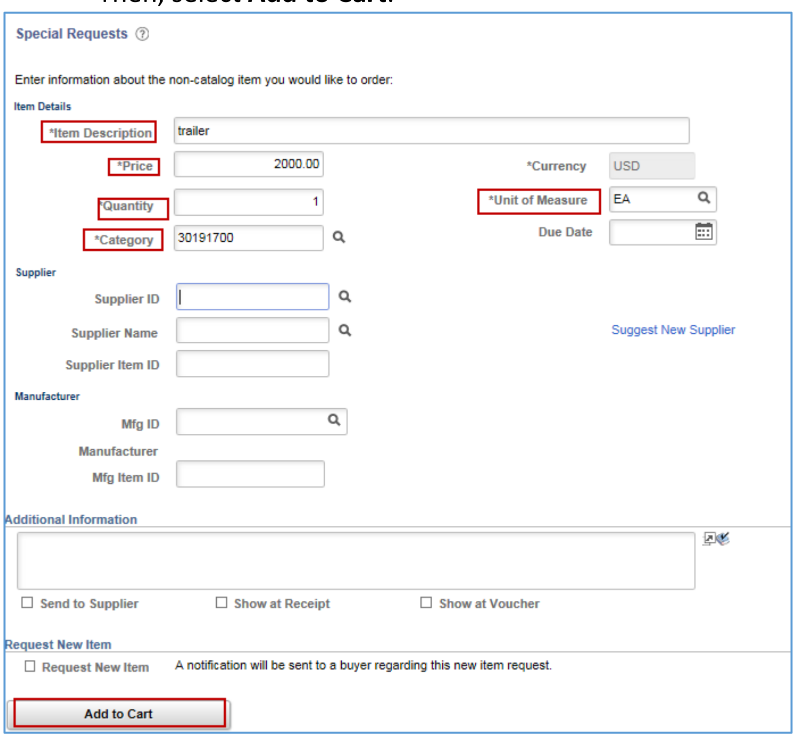


- If you add a new line, SWIFT displays the **Create Requisition** page. Select **Special Requests**.

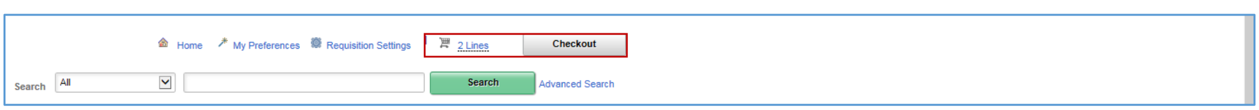


SWIFT opens the **Special Requests** page.

- On the **Item Details** section, enter the following values: *Item Description, Price, Quantity, Category* and *Unit of Measure.*
- Then, select **Add to Cart**.

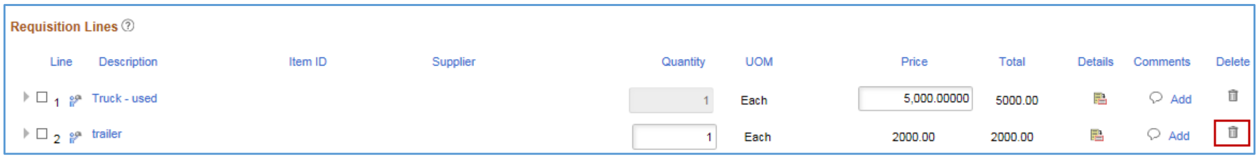


- SWIFT updates the page. You can see the lines at the top of the page. Select **Checkout**.

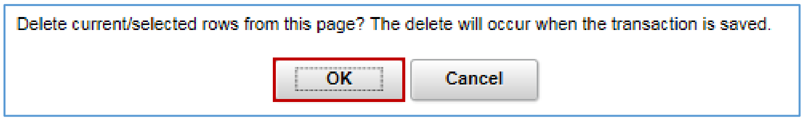


SWIFT returns you to the **Requisition - Review and Submit** page.

4. Delete any requisition lines as needed. To delete a line, select the **Delete** icon on the **Requisitions Lines** section.

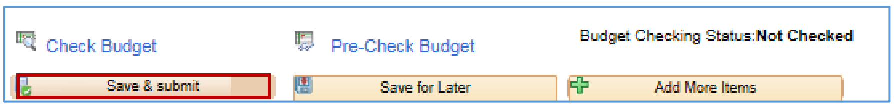


- SWIFT displays a message. Select **OK**.



Step 4: Review and submit the requisition

1. Once all changes are complete, go to the bottom of the page and select **Save and submit**.



2. SWIFT displays a **Confirmation** page with the new *Requisition ID*. Select **Check Budget**.

If the budget check is successful, the *Budget Status* is "Valid."

- If the *Budget Status* is not valid, then select the **Edit this Requisition** link and to return to the requisition. Correct any errors and save it. Then, budget check it again.
- When the requisition is in an "Approved" *Status* and has a *Budget Status* of "Valid", the requisition can be tied to other documents such as an event or Inventory Material Stock Request.

You have successfully created a new requisition by copying an existing requisition.