SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

Create a Requisition by Copying an Existing Requisition

IMPORTANT! You cannot create a Catalog Punchout Requisition (CTR) by copying an existing Requisition.

Agencies can save time and copy 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.
- Chartfield values copy into the new requisition. Make sure to confirm or enter the correct chartfield values.
- You can add or delete lines as required for the new requisition.

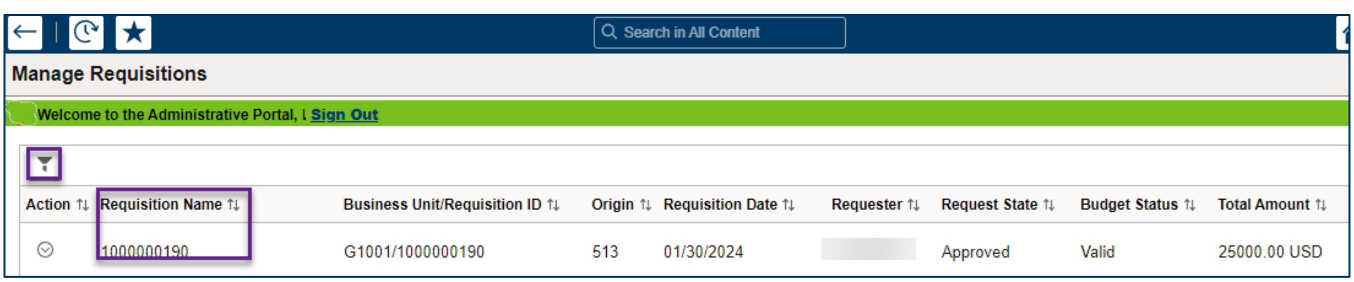
This guide lists the steps to create a new requisition by copying an existing one.

Step 1: Access the requisition to copy

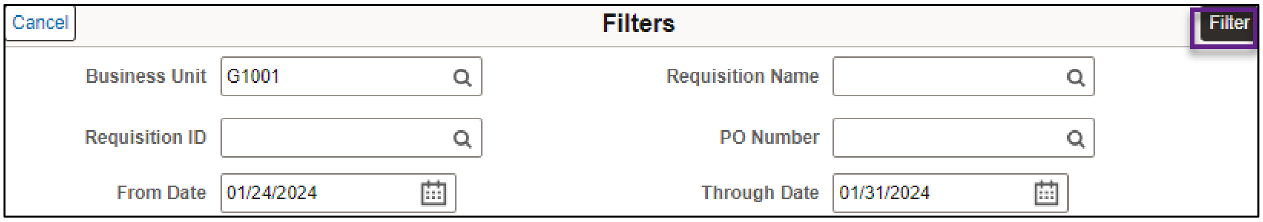
1. Navigate to the **Manage Requisitions** page in the EProcurement module.

Navigation Option	Navigation Path
Navigation Collection	Procurement, EProcurement, Manage Requisitions tile, Manage Requisitions page defaults.

2. SWIFT displays the Manage Requisitions page. It lists all your current requisitions.
    a. Look for the specific requisition to copy on the **Requisition Name** section.



    b. If you need to search for a specific requisition, select the Filter by icon at the top left of the page. It looks like a funnel.
        i. SWIFT displays the Filters page. Enter search criteria such as **From Date** or **Budget Status**. Select the **Filter** button at the top right of the page.

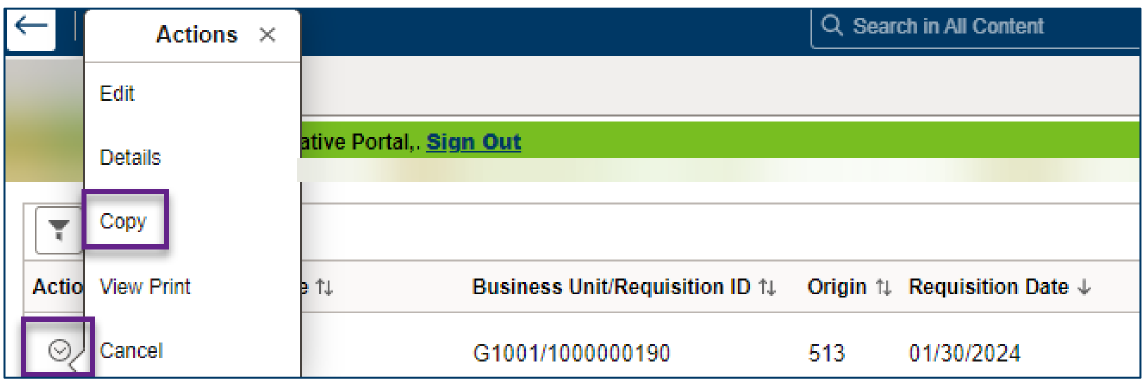


ii. Select the specific requisition from the search results.

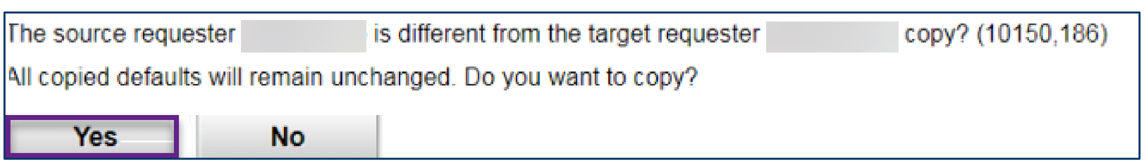
iii. SWIFT updates the table with the requisition you wish to copy.

Step 2: Copy from the existing requisition

1. Look at the left of the requisition for the **Actions** icon. It is a small green circle. Open it. SWIFT opens the Actions menu. Select **Copy**.

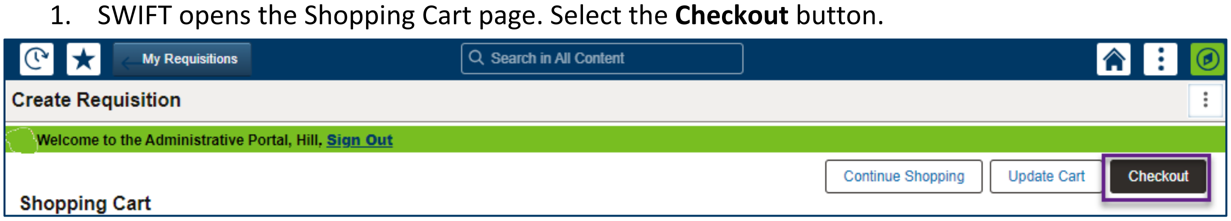


2. If you are copying from a requisition that you did not create, SWIFT sends a message. Select **Yes** if you want to copy it with the defaults unchanged.



Step 3: Update the newly created requisition

1. SWIFT opens the Shopping Cart page. Select the **Checkout** button.

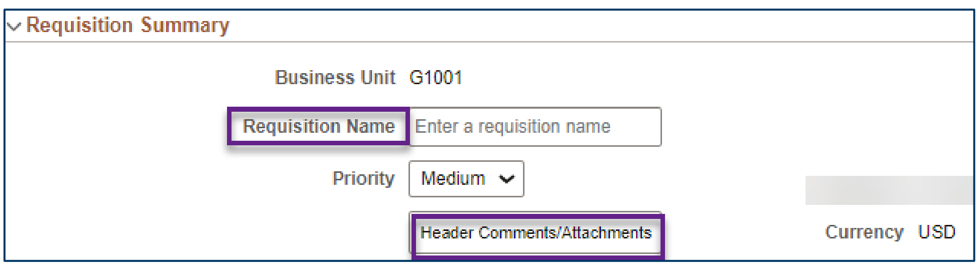


2. SWIFT displays the Checkout page. In the **header** of this page, confirm or update these areas to fit the new purchase request.
   a. Enter the **Origin**
   b. Select a **Document Type**. SWIFT does not copy the requisition Document Type into the new requisition values. Select the correct requisition Document Type of “OMR,” “CEO,” or “INV.”

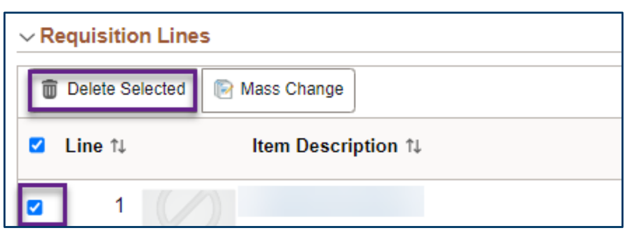
Reminder: You cannot copy a CTR requisition from an existing requisition.

   c. Update the **Agency Reference** field as needed.
   d. Enter the **Billing Location**.

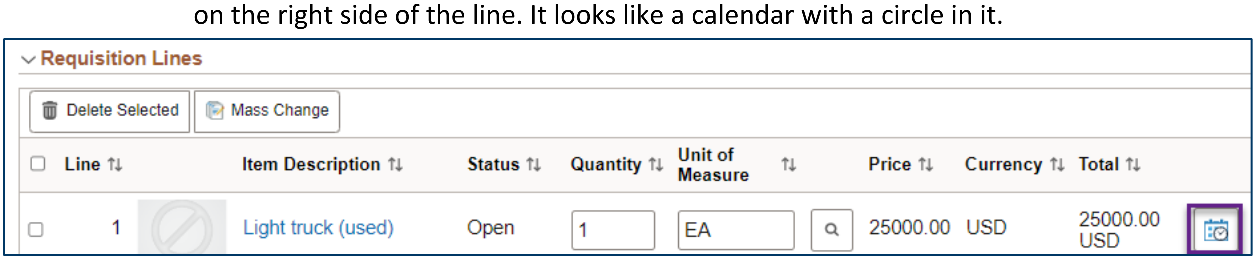
3. In the **Requisition Summary** section, add a **Requisition Name** if desired. You can also add header comments and attachments.



4. In the **Requisition Lines** section, update the lines.
   a. **Delete:** Delete any lines you don’t need. Check the box next to the line. Then select the **Delete Selected** button.

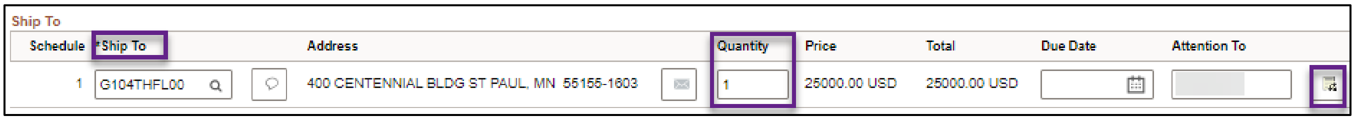


   b. **Quantity/View Schedule:** Update the Quantity as needed. Then, select the **View Schedule** icon on the right side of the line. It looks like a calendar with a circle in it.

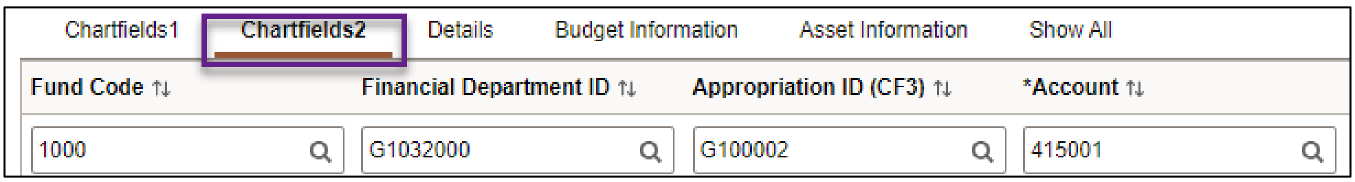


c. **Schedule Detail/Ship To/Distribution icon:** SWIFT opens the Schedule Detail page. Use it to access the Distribution page to add chartfield information.

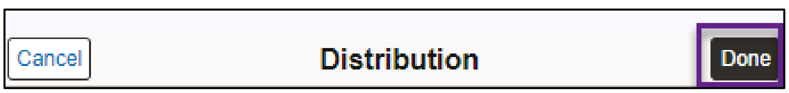
i. On the bottom left of the page, review the **Ship To** field and update it as needed.
ii. Update the **Quantity** field as needed. It needs to have at least “1.”
iii. Select the **Distribution** icon. It is on the far right of the line. It looks like a piece of paper with arrows inside.



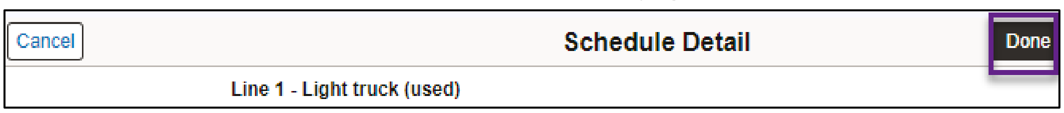
d. **Distribution page:** SWIFT opens the Distribution page. SWIFT populated the chartfield values from the copied requisition. Confirm or update chartfield values on the **Chartfields2** tab for the line.



e. At the top of the Distribution page, select the **Done** button.



f. SWIFT returns to the Schedule Detail page. Select the **Done** button.

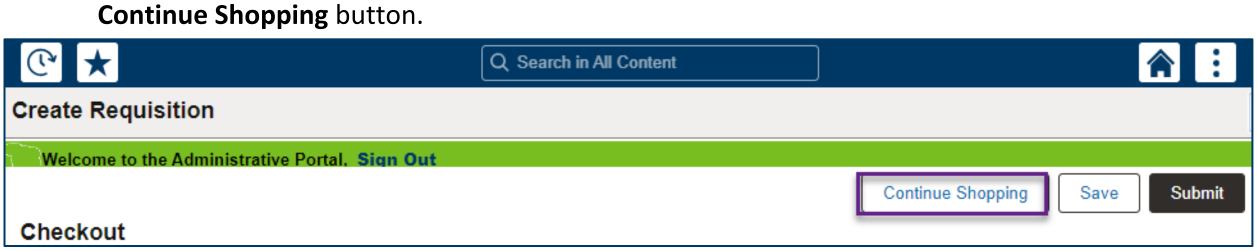


Step 4: Review the newly created requisition

SWIFT opens the Checkout page.

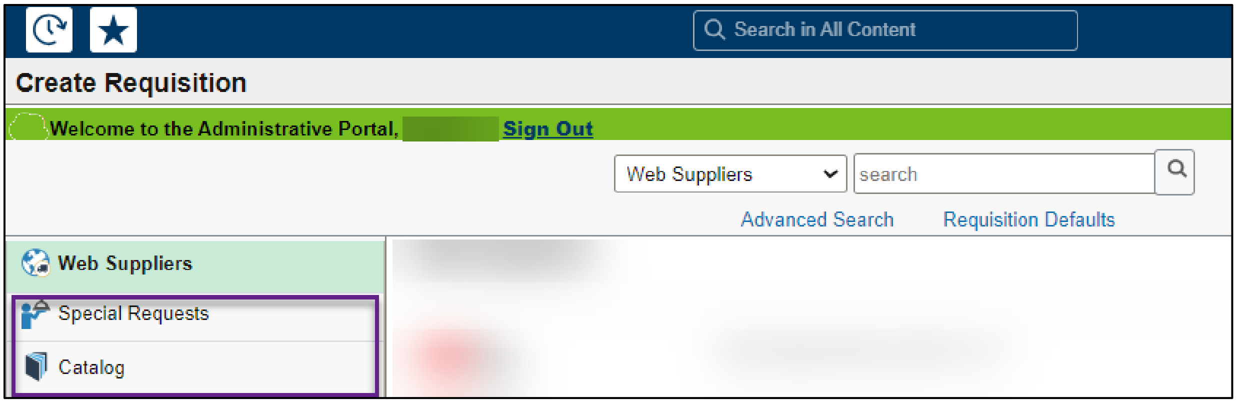
Continue Shopping Option

1. If you want to add a new line or update the price of the existing line on the new requisition, select the **Continue Shopping** button.



2. SWIFT opens the Create Requisition page.

- For CEO and OMR requisitions, select the Special Requestions option from the left menu.
- For INV requisitions, select Catalog.

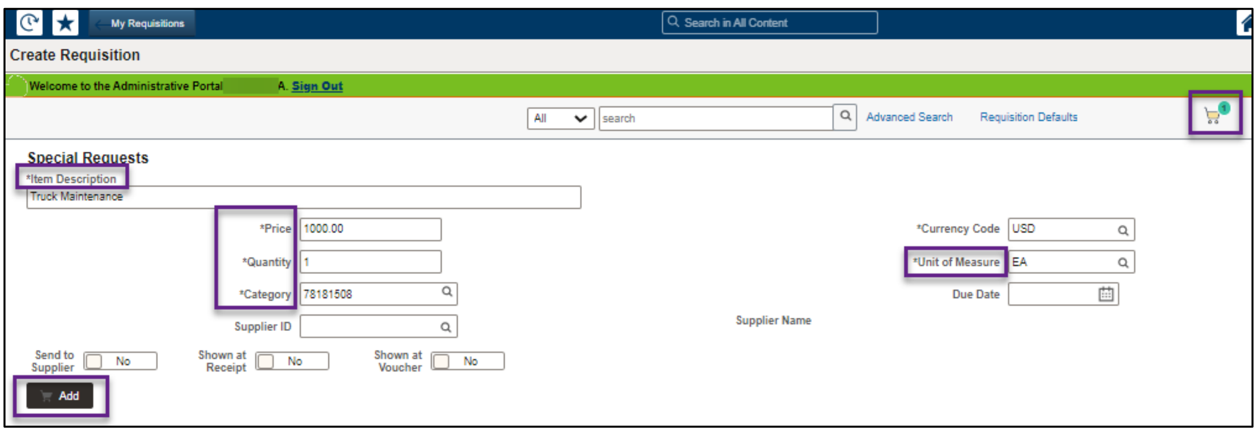


a. This example shows a CEO requisition. Select the **Special Requests** option.

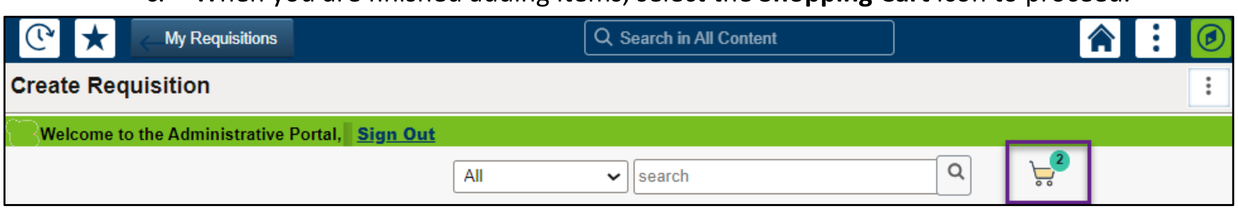
b. SWIFT opens the Special Requests page. At the top right, you can see the Shopping Cart shows items copied from the original requisition.

   i. To enter a new item, enter the **Item Description, Price, Quantity, Category**, and **Unit of Measure**. At the bottom of the page, select the **Add** button.

   ii. Repeat as needed to add more items.

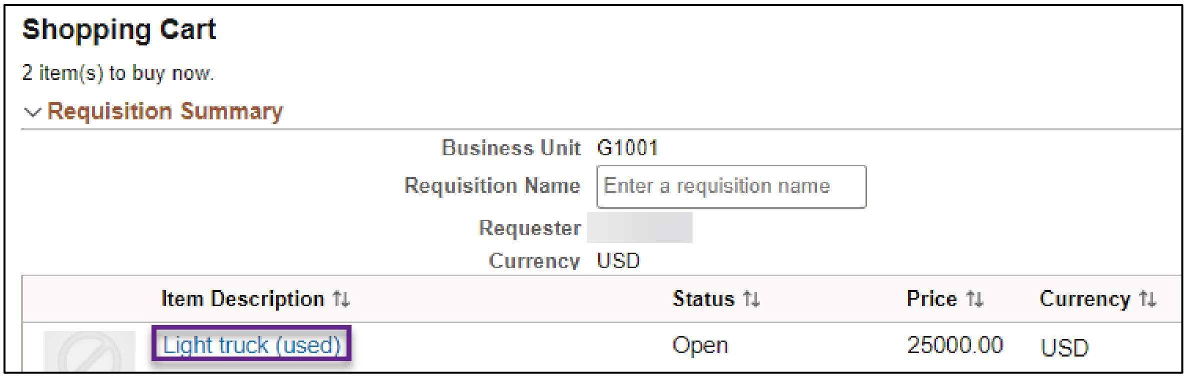


c. When you are finished adding items, select the **Shopping Cart** icon to proceed.



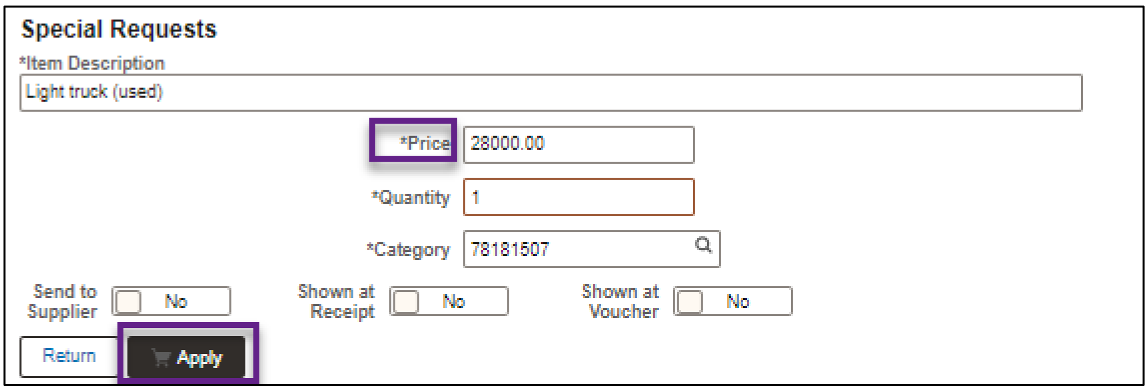
3. SWIFT opens the Shopping Cart page.

   a. If you need to change the price on an item, select the **Item Description** link on the left side of the line.

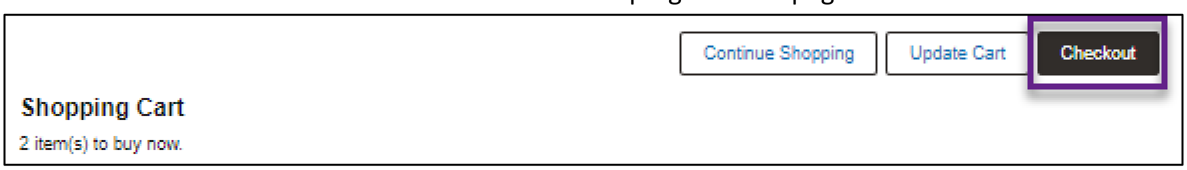


i. SWIFT opens the Special Requests page that is populated with your selected values. Change the price.

ii. At the bottom left of the page, select **Apply**.

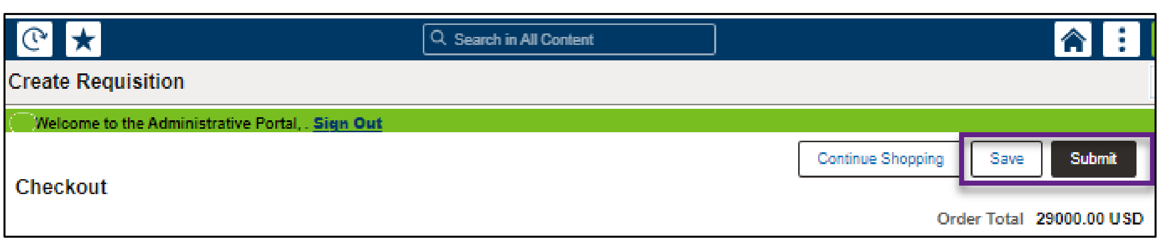


b. Select the **Checkout** button at the top right of the page.

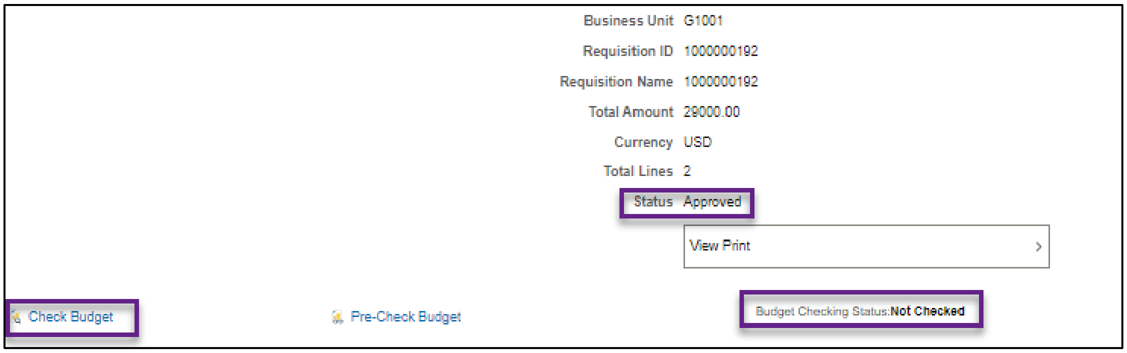


Step 5: Submit the Requisition

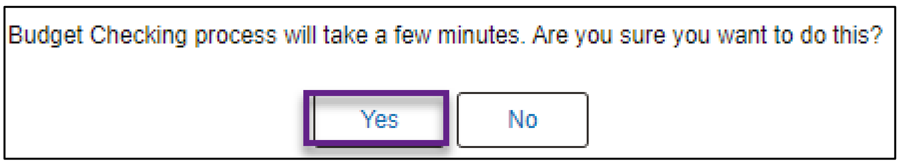
1. SWIFT brings you to the Checkout page. Select the **Save** button and then the **Submit** button.



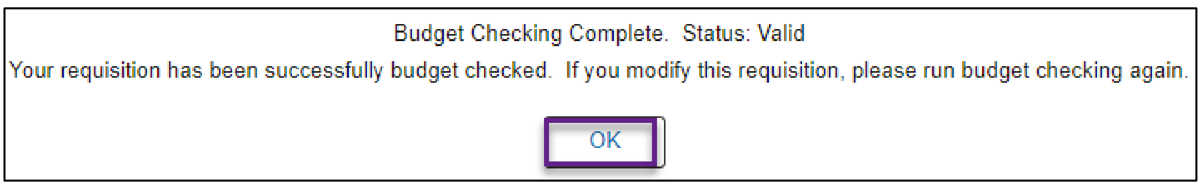
2. SWIFT displays a confirmation page with the new Requisition ID. Select the **Check Budget** link at the bottom left of the page.



3. SWIFT displays a message asking if you want to do budget checking now. Select **Yes**.



4. SWIFT displays another message stating that the Budget Checking Status is "Valid." Select **OK**.



   a. If the Budget Status is not valid, then select the **Edit this Requisition** link and to return to the requisition.
   b. Correct any errors and save it. Then, budget check it again.

5. The requisition is ready when it is an "Approved" Status and has a Budget Status of "Valid."