

## 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**.

**Manage Requisitions**

Requisition Search    Keyword Search

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: R2901    Requisition Name:    Origin:    Request State: All but Complete    Budget Status:    Date From:    Date To:    Requester:    Entered By:    PO ID:

Search    Clear    Show Advanced 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**.

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Origin	Date	Request State	Budget	Total	
▶ 1000003591	Hunter Walking Trail Ma...	R2901	A56	07/03/2019	Approved	Valid	15,000.00 USD	Copy <input type="button" value="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.

The source requester (00640747) is different from the target requester (00052258), copy? (10150,186)

All copied defaults will remain unchanged. Do you want to copy?

## Step 3: Update the newly created requisition

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

- 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*.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit R2901 Natural Resources Department

\*Currency USD Priority Medium

Suggested Vendors

OMR  Trail project

R291000221

- Review and update the **Requisition Lines** section.
  - Select the **Expand Section** icon for each line.

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	Truck - used			1	Each	5,000.00000	5000.00	

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- 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.

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	2019 Hunter Walking Trail Main			1	DOLLAR	15000.00	15000.00		Add	

Shipping Line 1

\*Ship To: R291000221  
 Address: 500 LAFAYETTE RD, ST PAUL, MN 55155-4045  
 Attention To:   
 Due Date:   
 Quantity: 1  
 Price: 15000.00

Accounting Lines  
 Distribute By: Amt Accounting Tag Multi-Accounting Tags

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

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

**Accounting Lines**

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Fund	Fin DeptID	Appropriation ID (CF3)	Account	Sub Acct	SW Cost	Agency Cost 1 (CF1)	Agency Cost 2 (CF2)	PC Bus Unit	Project
2209	R293W101	R296004	430001			2W712	1W1AA		
2207	R293W101	R296022	430001			2W601	1W1AA		

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

**Accounting Lines**

Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 **Budget Information**

Budget Status	Budget Date	Pre-Encumbrance Balance	Currency	Pre-Encumbered Base Balance	Business Unit Base Currency		
Not Chk'd	09/11/2019	0.00	USD	0.00	USD	+	-
Not Chk'd	09/11/2019	0.00	USD	0.00	USD	+	-

3. Add any requisition lines as needed.

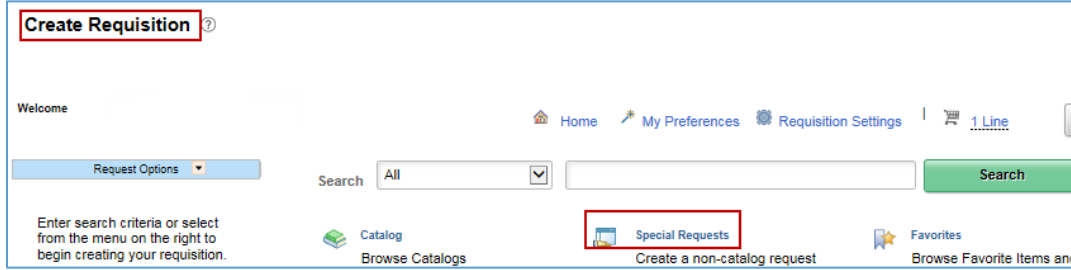
- To add a line, go to the Requisition Lines section and select the **Add More Items** button.

Expand lines to review shipping and accounting details **Add More Items**

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
1	2019 Hunter Walking Trail Main			1	DOLLAR	15000.00	15000.00

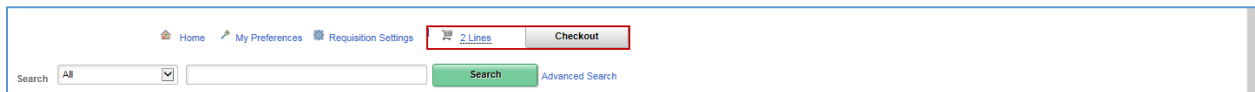
- If you add a new line, SWIFT displays the **Create Requisition** page. Select **Special Requests**.



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.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Truck - used			1	Each	5,000.00000	5000.00		Add	
2	trailer			1	Each	2000.00	2000.00		Add	Delete

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

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

## 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**.

Budget Checking Status: Not Checked

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.**