SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

Edit a Requisition

You can only edit an active requisition that has not been sourced to a purchase order, event, or Inventory Material Stock Request and does not have a Status of "Complete" or "Canceled." Typically, this means a Contract Encumbering Order (CEO) or Open Market Requisition (OMR) requisition.

Once you source a requisition, SWIFT changes the Source Status on each requisition line from "Available" to "In Process." Once the lines of any requisition document type are no longer in a Status of "Available," SWIFT locks down the requisition and doesn't allow edits.

IMPORTANT! You can edit any area not marked in gray.

Typical edits include the following:
- Update the ChartFields information
- Update the Budget Date
- Delete any lines
- Add additional lines

This guide lists the steps to edit a requisition with one line. It also includes information on how to edit a requisition with multiple lines using the Mass Change process.

Steps to edit a requisition with one line

## Step 1: Access the requisition on the Manage Requisitions page

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

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

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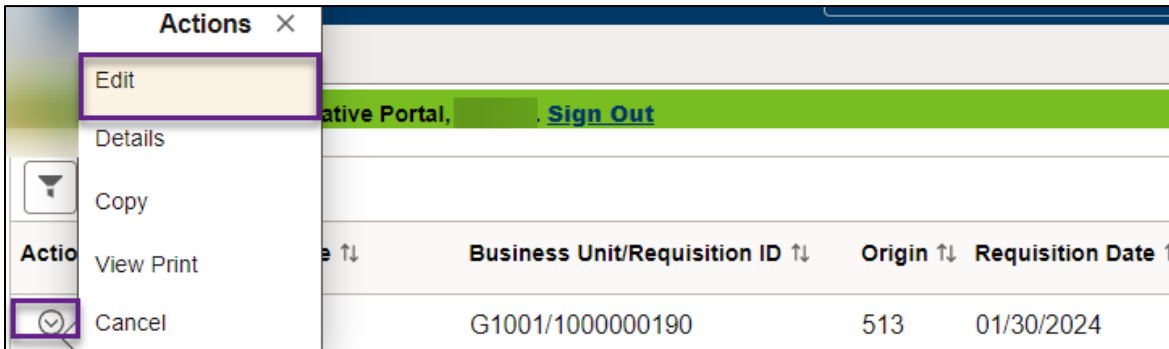   a. Look for the specific requisition to edit on the Requisition Name section.

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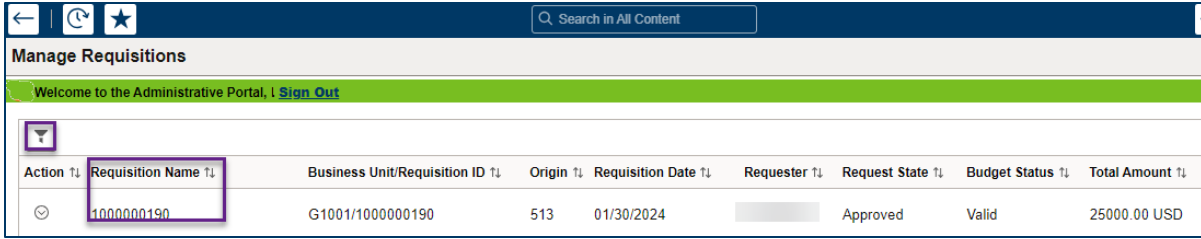
b. If you need to search for a specific requisition, select the Filter by icon at the top left of the page. It looks like a funnel.

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.
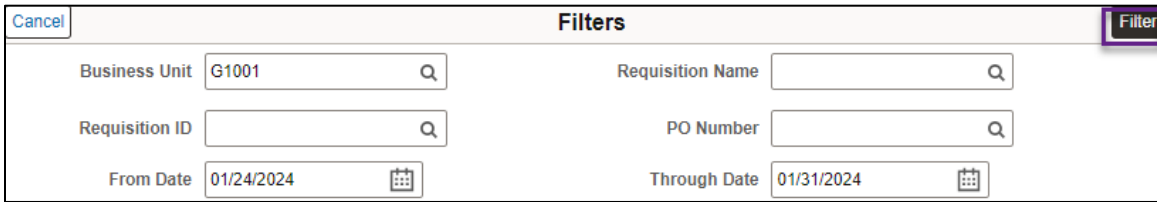
ii. Select the specific requisition from the search results.

Step 2: Edit the requisition using the Action icon on the left side of the requisition

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

Menu items in the Action menu

Field Name	Field Description
Edit	Opens the Checkout page to edit the requisition.
Details	Opens the Line Details page for that requisition. You can see fields such as Requisition Name, Date, ID, Request State, Requester, Budget Check Status, and Pre-Encumbrance Balance. It also shows you other documents attached to this requisition such as purchase order. And you can see the lines.

Field Name	Field Description
View Print	You will get a new window with all of the completed fields on one page.
Cancel	Allows you to cancel the requisition.

2. SWIFT opens the Checkout page. Update it as needed. For this example, we'll update Chartfields and the Budget Date.

    a. To update chartfields, go to the **Requisition Lines** section. Select the **View Schedule** icon. It looks like a calendar with a circle in it.

    b. SWIFT opens the Schedule Detail page. Go to the right side of the line and open the **Distribution** icon. It looks like a piece of paper with arrows.

    c. SWIFT opens the Distribution page. Select the **Chartfields2** tab to update Chartfields.

3. To update the Budget Date, select the **Budget Information** tab. Update it as needed.

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

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

Schedule Detail

Cancel | Done

Line 1 - Light truck (used)

Step 3: Process the requisition on the Checkout page

1. SWIFT returns to the updated Checkout page.
   a. Select the **Save** at the top right of the page.
   b. Then select the **Submit** button. This saves and submits the updated page.

Continue Shopping | Save | Submit

Checkout for Requisition ID 1000000190

2. At the bottom of the page, select the **Check Budget** link.

Business Unit G1001
Requisition ID 1000000190
Requisition Name 1000000190
Total Amount 25000.00
Currency USD
Total Lines 1
Status Approved

View Print >

Check Budget   Pre-Check Budget   Budget Checking Status: Not Checked

3. SWIFT displays a message about the Budget Checking process. Select **Yes.**

Budget Checking process will take a few minutes. Are you sure you want to do this?

Yes | No

4. Ensure the Budget Checking Status is "Valid." If not, resolve the budget error and rerun the budget check.


Status Approved

View Print >

Check Budget   Pre-Check Budget   Budget Checking Status: Valid

You have successfully edited a requisition with one line.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

How to edit a requisition with multiple lines using Mass Change

The Mass Change process allows you to make changes to multiple lines using one process.

1. Access the requisition on the **Manage Requisitions** page.
2. Edit the requisition using the **Action** icon on the left side of the requisition.
3. Go to the **Requisition** Lines.
   a. Check the box next to the lines you wish to edit.
   b. Then, select the **Mass Change** button.
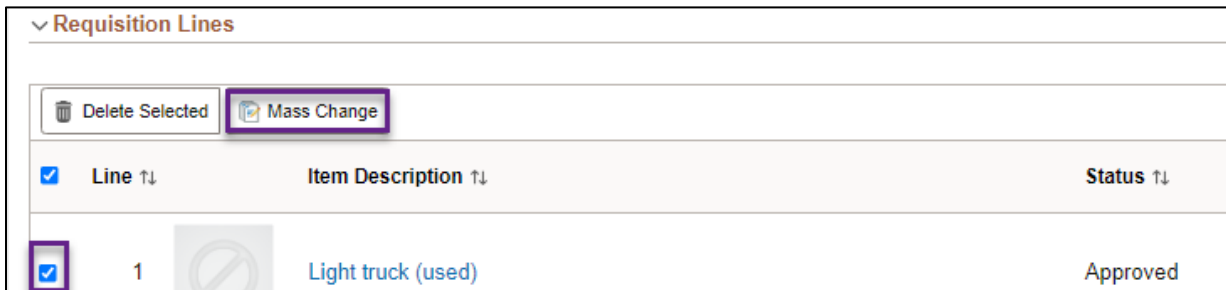
4. SWIFT opens the Mass Change window. At the bottom of the page, select the **Load Values from Defaults** button.
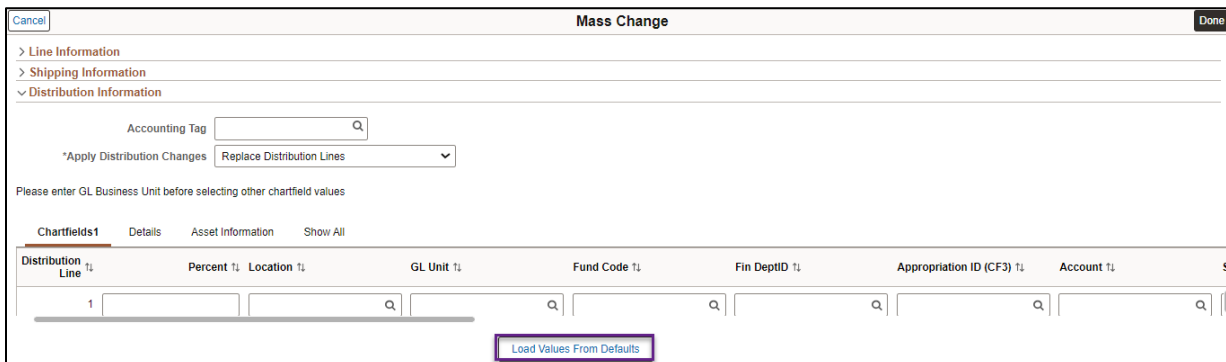
5. SWIFT uploads the values from the Defaults page such as from the Line Information, Shipping Information, and Distributions section from the requisition. Make changes to the requisition on the Mass Change page.

   a. For changes to chartfields, select the Chartfields1 tab.
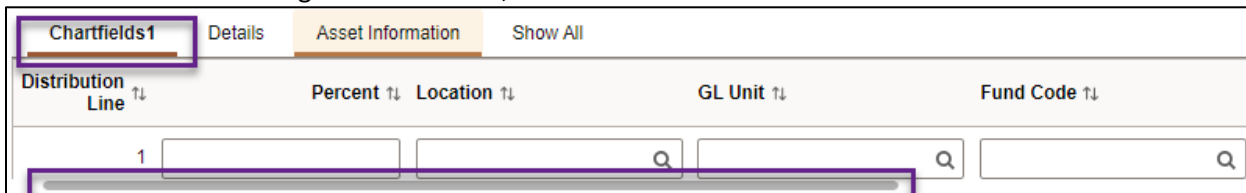
   i. If you wish to add a line, open the **Details** tab. Scroll to the far right of the line and select the **Add a New Row** icon. It is a plus sign.

ii. If you are updating chartfield lines, make sure to add the changes to the Percent field to allocate the amounts attached to the lines.

iii. Make sure the Location field is populated for all lines.

b. When you are done with the changes, select the **Done** button on the top right of the page.

c. SWIFT displays a message about retrofit field changes. Select **OK**.

6. Continuing processing the requisition with the updated distribution lines.

You have successfully edited a requisition with multiple lines using Mass Change.