SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

September 15, 2025

Edit a Requisition

You can only edit an active requisition that has not been sourced to a purchase order or event. It must be in an "Open" or "Approved" Status. Typically, this means a Contract Encumbering Order (CEO) or Open Market Requisition (OMR) requisition. There are limitations on what fields you can edit on Catalog Punchout Requisitions (CTR).

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.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Manage Requisitions

Welcome to the Administrative Portal, Karpenko,Sheri A. Sign Out

Requisition Search

Action ↑↓	Requisition Name ↑↓	Business Unit/Requisition ID ↑↓	Origin ↑↓	Requisition Date ↑↓	Requester ↑↓	Request State ↑↓	Budget Status ↑↓	Total Amount ↑↓
⊙	Fishing	R2901/1000016173	A24	08/07/2025		PO(s) Created	Valid	3,700.00 USD
⊙	1000016172	R2901/1000016172	A12	08/07/2025		Approved	Valid	25,000.00 USD

b. If you need to search for a specific requisition, select the **Filter By** icon at the top left of the page.

c. SWIFT displays the Filters page. Enter search criteria such as From Date or Budget Status. Select the **Done** button at the top right of the page.

Cancel | **Filters** | Done

Business Unit	R2901	Requisition Name	
Requisition ID		PO Number	
From Date	08/01/2025	To Date	
Requester		Entered by	
Request State	All but Complete	Budget Status	

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

Field Name	Field Description
Inquiry	Brings you to the Requisition Summary information with links to the Pre-Encumbrance Balance and Item Description.
Check Budget	Allows you to validate the budget.

2. SWIFT opens the **Checkout** page. Update it as needed.

    a. In the **Requisition Summary** section, you can edit the values in these fields: Requisition Name, Origin, Agency Reference, and Billing Location.

    b. If you select the **Header Comments** button, you can add or update comments.

    c. You can add **Justification Comments**.

    d. In the **Requisition Lines Overview**, you can edit the following: Quantity and Unit of Measure Fields on CEO or OMR requisitions.

    i. If hover over the description, you can see the **More Information** link below the Special Requests section. If you select the link, you will go to a separate page to edit additional items.
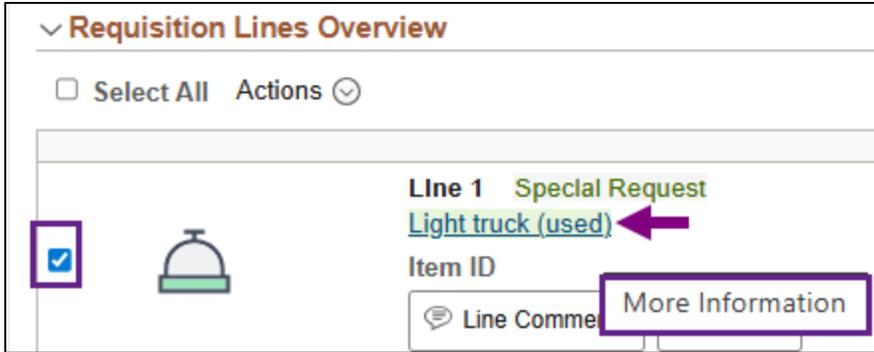
ii. it brings you to the Special Requests page to edit additional values such as the Category field, Request New Item box, and add any comments.

iii. Select the **Apply** box at the bottom of the page to return to the Checkout page.
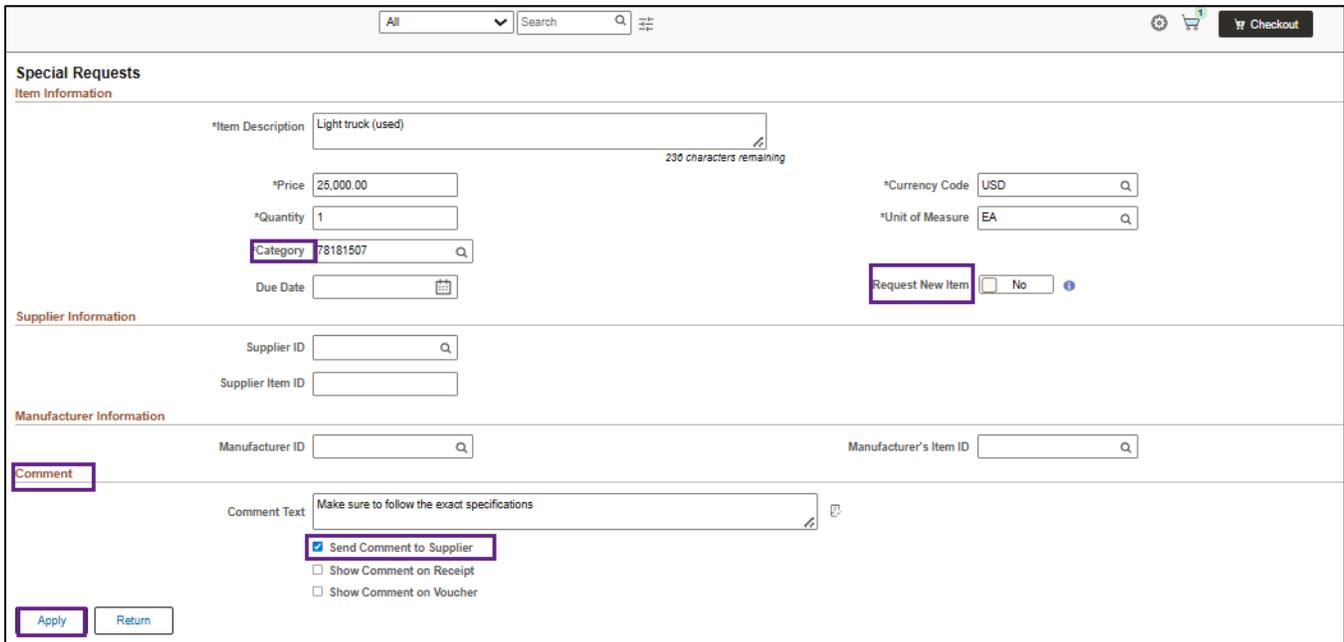
e. The **Schedule/Details** button in the Requisition Lines Overview, allows you to update schedule information and Distributions.

   i. If you select this button, SWIFT displays the **Schedule Details and Line Details** tabs.

   ii. You can update distribution information in the **Scheduled Details** tab.

   iii. Select **Show All** to see all of the available fields to edit.

   iv. At the top of the page, select **Done**.

f. Select the **View Details** arrow (next to the Schedule Details button) to see details from the **Requisition Line Details** page.

g. On the **Requisition Line Details** page, you can edit the Buyer and view other information such as Contract and Supplier Information. This information should never be changed, deleted or added on CTRs.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

| Cancel | **Requisition Line Details** | Done |

Order Total 25,000.00 USD   < 1/1

Line 1

Schedule Details   **Line Details**

⌄ Item Summary

Light truck (used)

Item ID   Physical Nature Physical Goods ⌄
Category 78181507 Automotive and light truck mai   Buyer [____] 🔍
Original Substituted Item
Long Description Light truck (used)   [Buyer Information]

Price 25,000.00 USD
Quantity 1 EACH   [Show Configurator]
Total Amount 25,000.00 USD

Attributes
⌂ Special Request

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h. You can delete the line by selecting the **Delete** button in the Requisition Lines Overview section.

Step 3: Process the requisition on the Checkout page
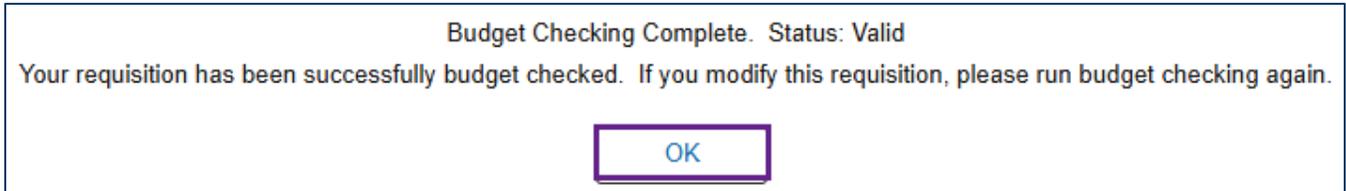
1. SWIFT returns to the updated **Checkout** page.
    a. Review the information on the page.
    b. Then select the **Submit** button. This saves and submits the updated page.

| | Continue Shopping | Save | **Submit** |

Checkout for Requisition ID 1000016172

Order Total **25,000.00 USD**
Pre-Encumbrance Balance **25000.00 USD**
Pre Encumbrance Details

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2. If the Budget Checked Status is "Not Checked," select the **Check Budget** button.

🖶 Print Preview

Requisition Details

Business Unit R2901   Total Lines **1**
Requisition ID 1000016172   Total Amount **50,000.00 USD**
Requisition Name 1000016172   Budget Checked Status ⚠ Not Checked
Last Modified Date 08/19/2025 6:56:00AM   [🧹 Check Budget] [🧹 Pre-Check Budget]
Status ✅ Approved

Next Steps

📝 Edit this Requisition
   Modify this requisition

👥 Manage Requisitions
   Go to existing requisitions

🛒 Create Requisition
   Create another requisition

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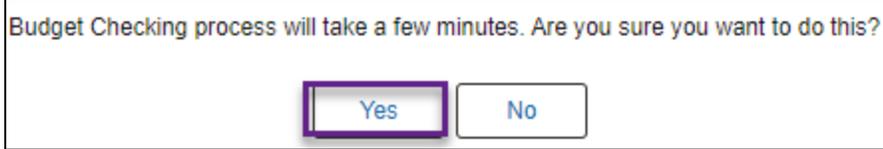
4. Ensure the Budget Checking Status is "Valid." If not, resolve the budget error and rerun the budget check. Select **OK**.

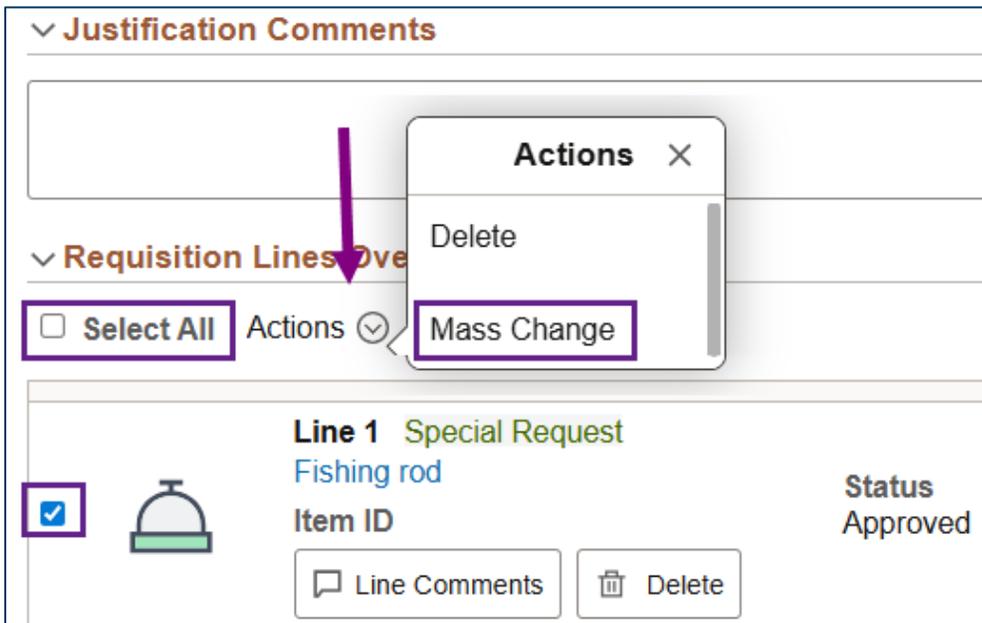Budget Checking Complete. Status: Valid

Your requisition has been successfully budget checked. If you modify this requisition, please run budget checking again.

OK

You have successfully edited a requisition with one line.

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 **Actions** icon on the left side of the requisition.
3. Go to the **Requisition** Lines.
    a. Choose **Select All** or the specific line.
    b. Then, select the **Mass Change** button.

> Justification Comments

> Requisition Lines Ove

Select All   Actions ⊘

Actions ✕

Delete

Mass Change

Line 1 Special Request
Fishing rod
Item ID

Status
Approved

☐ Line Comments   🗑 Delete

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 **Show All** tab in the Distribution Information section.

        i. Update the distributions as needed.

        ii. Make sure the **Percent field** is correct such as 100% for one distribution. For multiple distributions, split to make sure they add up to 100%.

        iii. To split the distribution, you can 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.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

    iv.   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.