SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Edit an Inventory Requisition Template

A requisition is an internal document that agencies use to request a purchase. Use the eProcurement module in SWIFT to create and process requisitions. Do not dispatch the requisition to suppliers. Agencies can use SWIFT's eProcurement module to withdraw the items they keep in stock in a warehouse. Currently only a few agencies create inventory requisitions to order their materials from their warehouses.

Agency staff can set up multiple personal templates for inventory requisitions. Templates are a list of items that can be pulled into a requisition as a group, rather than searching for each item and individually entering it. These templates make it easier to place repetitive orders for the same items. Once created, agency staff can edit their inventory requisition templates.

There are two ways to edit a template:

1. Delete a line or change the quantity on a template:

   - Use the My Profile page to delete a line or change the quantity on the line.

2. Add a line on a template:

   - Create a new requisition using the template that needs additional lines added. Add the additional items and update the template.

This guide describes the two ways to edit a template. It does not discuss the details about creating and processing inventory requisitions. For more information about requisitions, refer to the SWIFT Reference Guides

Steps to delete a line or change the quantity on a template:

- Step 1: Access your personal templates
- Step 2: Edit a personal template

Steps to add a line on a template:

- Step 1: Enter information into a new requisition
- Step 2: Update the template

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Steps to delete a line or change the quantity on a template

Step 1: Access your personal templates

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

| Navigation Options	Navigation Path
Navigation Collection	Procurement, eProcurement, Manage Templates, My Profile, Manage Templates page.

2. SWIFT opens up the **My Profile** page. Select the **Manage Personal Templates** link on the top of the page.
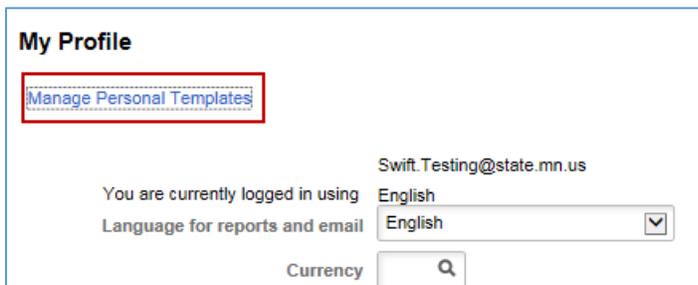
SWIFT displays the **Manage Templates** page where you can view and manage your personal templates.

Step 2: Edit a personal template

1. There are several actions you can take on the **Manage Templates** page.
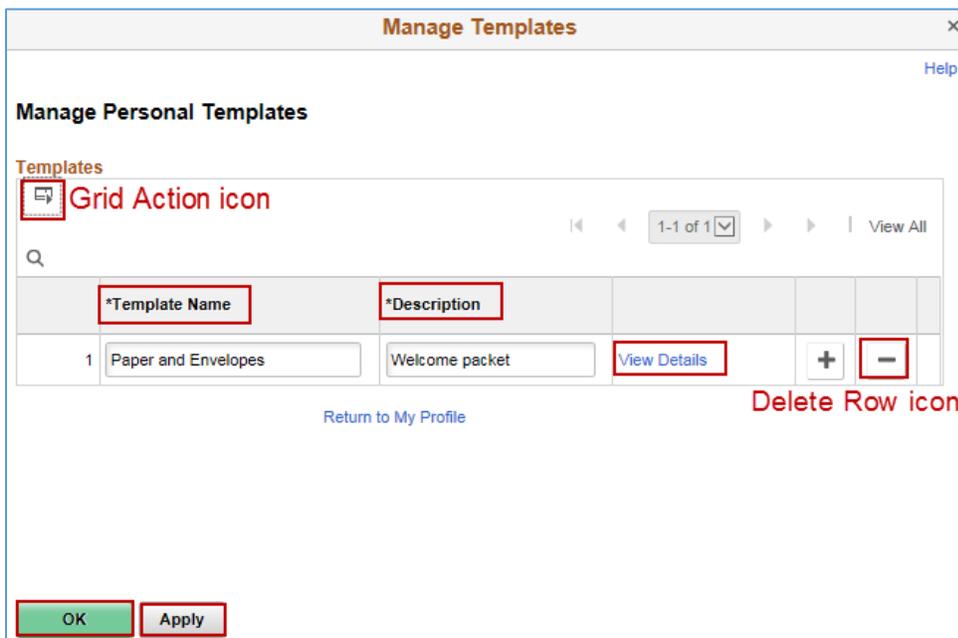
- You can zoom the template (e.g., make it bigger) or download it to Excel using the **Grid Action** icon.

- You can change the *Template Name* or *Description*.

2. If you select the **View Details** link in a template, SWIFT opens up the **View Details** page for that template. You can change some details within the template.

- You can change the quantity (e.g., *Qty*).
- You can delete an item in it using the **Delete** icon (e.g., "-").
- If you make changes, press the **OK** button to retain the changes on the template.

- SWIFT returns you to the **Manage Templates** page.

3. On the **Manage Templates** page, you can delete templates using the **Delete** "-" icon.

If you do delete a template, press the **Apply** button when you are done, then the OK button to exit the page.

4. SWIFT returns you to the **My Profile** page. When you are done making changes, press the **Save** button.

NOTE: You cannot add a new template using the **Add** "+" icon on the **Manage Personal Template** page. Instead, create a new inventory requisition and save it as a template.

You have successfully learned how to delete a template or change the quantity on a template.

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Steps to add a line on a template

To add a line on an existing template for an inventory requisition, you will need to create a new requisition to access the template update functionality. On the **Checkout - Review and Submit** page, enter the new item(s). Then, save the new lines on the existing template.

Step 1: Open the Requisition Settings page

1. Navigate to the **Requisition Settings** page in the eProcurement module.

Navigation Options	Navigation Path
Navigation Collection	Procurement, eProcurement, Requisitions, Create Requisitions, Requisition Settings page.

2. On the **Requisitions Settings** page, select the **OK** button at the bottom of the page to move to the **Create Requisition** page.

Step 2: Enter information on the Create Requisition page
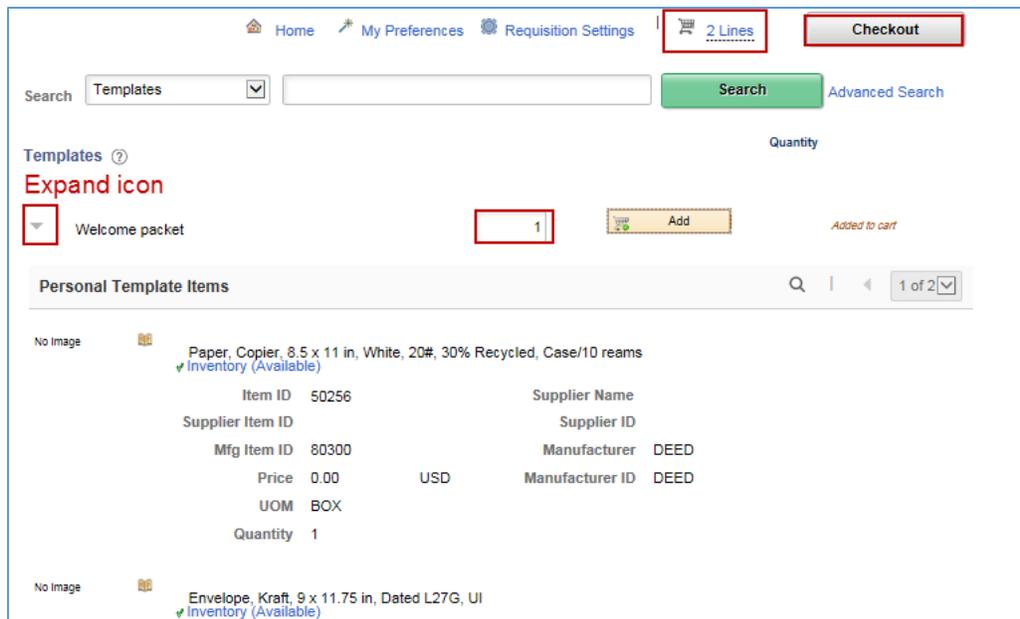
1. SWIFT displays the **Create Requisition** page. Look at the **Templates** section and press the link of the template you wish to update.
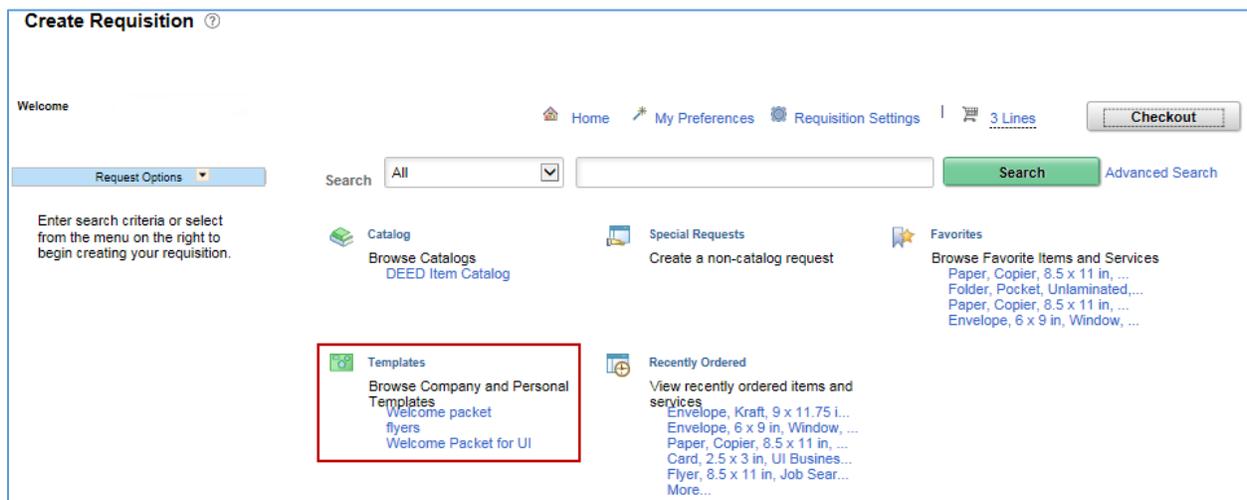
2. Use the template to add items.

- Press the **Expand** icon to see items in the template.
- Populate the quantity field and press **Add**.

NOTE: The **Shopping Cart** icon will show the number of items currently in the template that have been added to the requisition.
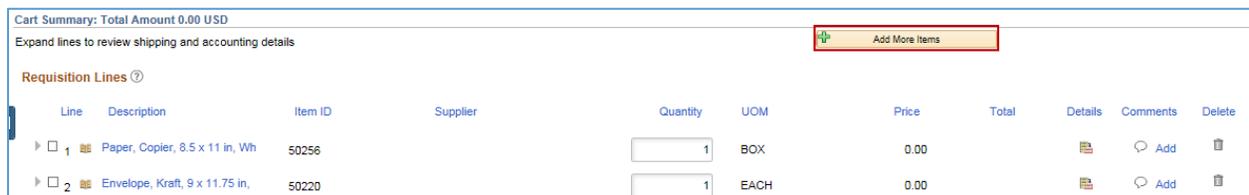
- Press the **Checkout** button at the top of the page.

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Step 3: Add the new item and save the requisition

SWIFT displays the **Checkout – Review and Submit** page.

1. On the **Cart Summary** section, press the **Add More Items** button.

IMPORTANT! If the item is out of stock or no longer in an "Active" status, you cannot add it to the template.

SWIFT brings you to the **Create Requisition** page.

2. Using the various search options, find the item to add.

- You can use the **Catalog, Recently Ordered**, or **Favorites** search options.
- If you know the *Item ID* you want to add, set the **Search** dropdown to "All". Enter the *Item ID* in the **Search** field. Press the **Search** button.

IMPORTANT: Make sure to choose a line that does not have a contract associated to it. SWIFT will not be able to use lines associated with a contract on the template.
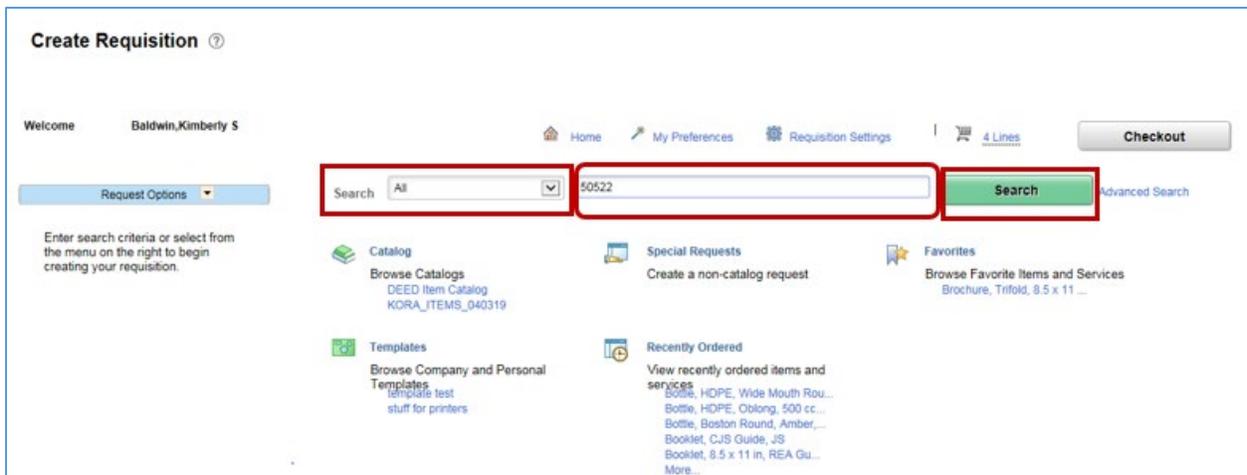
3. Make sure the item you wish to add to the template is available.

- Press the **Inventory** link. SWIFT will open a window that tells you how many items are available in inventory.
- Enter the *Quantity* to add to the template and press the **Add** button.
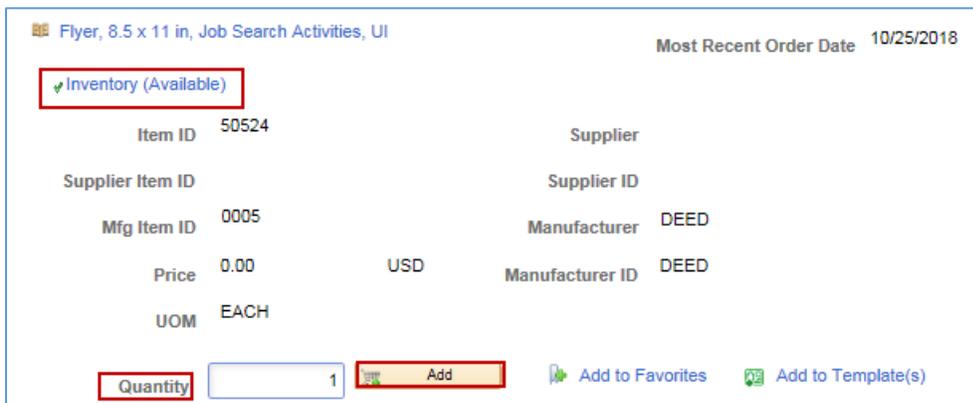
At the top of the page, view the **Shopping Cart** icon. SWIFT indicates that it added the lines.
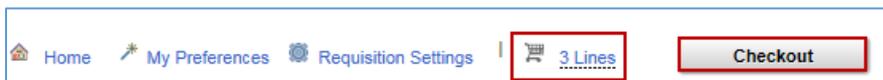
4. SWIFT brings you to the **Checkout- Review and Submit** page. Update it as needed.

- Check the boxes next to the new item(s) that SWIFT added. Select the **Add to Template(s)** link.

- SWIFT displays the **Add Items to Template** page. Check the box of the template you want to update with the new item(s). Then, press the **OK** button.

5. SWIFT updates the template with the additional items. SWIFT will pull those items into requisitions using the updated or new template. You do not need to save the requisition to successfully update the template.

- If you need to use the requisition, complete the **Requisition Settings** page and enter *Chartfield* values. Save and submit and budget check the requisition.

You have successfully added lines to an existing template.