

QUICK REFERENCE GUIDE

Updated November 1, 2019

Edit an Inventory Requisition

CAUTION! If you need to edit an inventory requisition, the best practice is to update it before you save and submit it. Follow the *Create an Inventory Requisition* reference guide.

A requestor creates the inventory requisition in EProcurement. SWIFT creates a material stock request to order inventory from the warehouse through SWIFT.

You can edit any area on an existing inventory requisitions that is not marked in gray. Typical edits include the following.

- Update the ChartFields information as needed.
- Update the Budget Date as needed.
- Delete any lines as needed.
- Add additional lines as needed.
- Update the quantity.

There are limits to editing an existing inventory requisition.

- You can only edit an inventory requisition with a *Request State* of “Open” or a *Budget Status* of “Not Checked” or “Prov Valid”.
- If the requisition line *Status* on an inventory requisition is “Available”, you can edit it using the same basic steps as an Open Market Requisition (OMR) or Contract Encumbering Order Requisition (CEO) requisition.

SWIFT automatically updates inventory requisitions as part of its batch process. Once SWIFT runs the batch process and sources a requisition to an Inventory Material Stock Request, you can no longer edit the inventory requisition.

If you try to edit an inventory requisition that does not have one of these statuses or after the batch process has run, SWIFT will display an error message. You cannot edit it.

This requisition cannot be edited. One or more lines have been sourced. (18036,6091)

This guide lists the steps to edit an existing inventory requisition.

Steps to complete

- Step 1: Access the inventory requisition
- Step 2: Edit the inventory requisition
- Step 3: Process the inventory requisition

Steps to edit an Inventory Requisition

Step 1: Access the inventory requisition

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

Navigation Options	Navigation Path
Navigation Collection	Procurement, EProcurement, Requisitions. Left menu, Manage Requisitions, Manage Requisitions page.

2. On the **Manage Requisitions** page, enter search criteria to locate the requisition. Select **Search**.

SWIFT opens up the search results on the **Requisitions** section below the **Manage Requisitions** search page.

3. Locate the correct inventory requisition. Go to the right side of the row and select the “Edit” option. Select the **Go** button.

Step 2: Edit the inventory requisition

SWIFT displays the **Edit Requisition – Review and Submit** page for the desired requisition.

1. Edit the header of the inventory requisition as needed.

2. Edit the **Requisition Lines** section as needed.

As a reminder, SWIFT allows you to edit items that are not grayed out. Update it needed.

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Booklet, CJS Guide, JS	50241		5.00	EACH	0.00			Add	Delete

3. Update the ChartFields information as needed.

- Select the **Expand Section** icon on left side of the line. Go to the bottom of the page to the **Accounting Lines** section.
- If you want to update Chartfield information, select the **Chartfields2** tab.

IMPORTANT: Make sure you enter the correct Chartfield information on the requisition. If you enter invalid values, SWIFT will not create the material stock request.

Accounting Lines

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

Fund	Fin DeptID	Appropriation ID (CF3)	Account	Sub Acct	SW Cost	Agency Cost 1 (CF1)	Agency Cost 2 (CF2)
1000	G1031100	G100001	470602				

4. Update the *Budget Date* as needed. If you want to update the *Budget Date*, select the **Budget Information** tab.

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

Budget Status	Budget Date	Pre-Encumbrance Balance	Currency	Pre-Encumbered Base Balance
Valid	10/03/2018	5000.00	USD	5,000.00 USD

5. Update the *Ship To* field as needed. *Ship To* is the location where the goods are delivered.

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price
1	Booklet, CJS Guide, JS	50241		5.00	EACH	0.00

Shipping Line 1 *Ship To B22STPLFNB Add Shipto Comments Quantity 5

6. Delete any lines as needed. Select the **Delete** icon for the line you wish to delete.

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Non Inv Line			10	EACH	15.00	15.00		Add	Delete

- SWIFT displays a message confirming that you want to delete the line. Select the **OK** button.

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

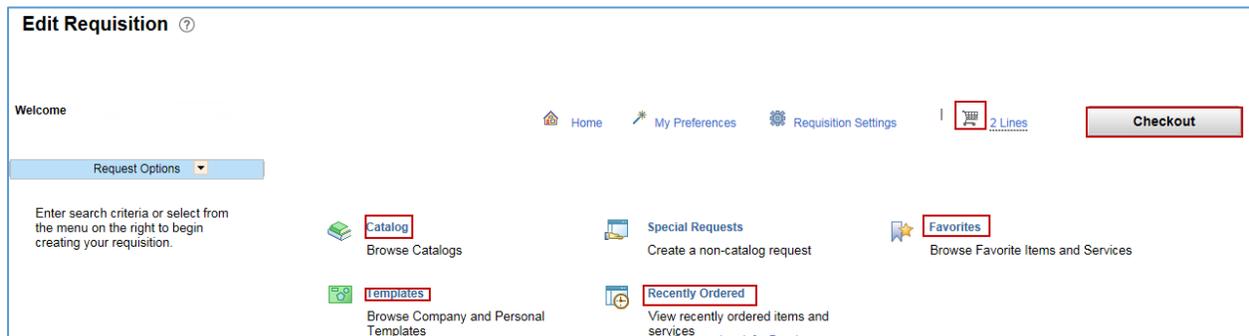
OK Cancel

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- SWIFT returns you to the **Edit Requisition – Review and Submit** page.
7. Add additional lines as needed. Select the **Add More Items** button.



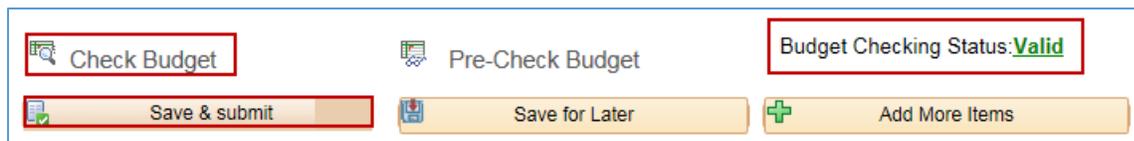
- SWIFT displays the **Edit Requisition** page. You can enter items into this section from the **Catalog, Templates, Recently Ordered** or **Favorites** if you have items in these sections.



- After you enter these items, SWIFT updates the **Shopping Cart** to show the additional line. Select the **Checkout** button.
- SWIFT returns you to the **Edit Requisition – Review and Submit** page.

Step 3: Process the requisition

1. When you complete the edits on the requisition, go the bottom of the **Edit Requisition – Review and Submit** page. Select the **Save & submit** button.



2. SWIFT display the **Confirmation** page.
- Depending upon the change, you may need to run the budget check. Select the **Check Budget** button.
 - Ensure the *Budget Checking Status* is "Valid". If not, resolve the budget error and run the budget check process.

You have successfully edited an inventory requisition.