

QUICK REFERENCE GUIDE

November 1, 2019

Use the Manage Requisitions Page

The **Manage Requisitions** page in the EProcurement module allows you to view and manage requisitions. You can also use it to perform tasks, such as review requisition details, edit or cancel requisitions, copy a requisition, or view approvals. The available actions vary depending on the status of the requisition.

This reference guide describes the features on the **Manage Requisitions** page. It shows the page from the actions but does not describe the details of these actions. It also lists the Request State (i.e., status) fields on a requisition.

Steps to complete

- Step 1: Access the Manage Requisitions page
- Step 2: Search for the individual or group of requisitions
- Step 3: Perform tasks on the Manage Requisitions page

Steps to use the Manage Requisitions page

Step 1: Access the Manage Requisitions page

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

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

- SWIFT displays the **Manage Requisitions** page.

Step 2: Search for the individual or group of requisitions

- Search for individual or groups of requisitions.
- Enter search criteria on this page and press the **Search** button.

Fields on the Search Requisitions area on the Manage Requisitions page

Field	Field Description
* Business Unit	Validate the default or enter a business unit. This is a required field. A Business Unit generally represents a legal entity, such as the State agency responsible for the requisition.
Requisition ID	A unique ID SWIFT gives to a requisitions within a business unit.
Date From/Date To	Enter the creation date or range of dates for the requisitions
Requester	Defaults to the person entering the requisition, but it can be changed.

Field	Field Description
Requisition Name	Create a name that helps you organize it. It does not appear on the purchase order.
Requisition State	Refers to the request state (i.e., status) of the requisition across the entire procurement cycle. See the descriptions at the end of this guide.
Entered By	Employee ID who entered the individual or group of requisitions.
Origin	This code represents a division, region or district within an agency that originated a purchase order.
Budget Status	<p>A blank field defaults. SWIFT will bring all requisitions in all statuses.</p> <ul style="list-style-type: none"> • Document in Processing: SWIFT does not currently use this feature. • Error in Budget Check: Requisitions that did not pass the budget check • Not Budget Checked: Requisitions that the agency did not budget check yet. • Provisionally Valid: Requisitions that passed by budget check when an agency used the Pre-Check Budget button. • Valid: Requisitions that passed the budget check
PO ID	A unique ID SWIFT gives to a purchase order within a business unit.
Show Advanced Search link	If press this link, SWIFT displays search fields that are used only by a few state agencies who use the EProcurement module for inventory. These fields include Item ID, Item Description, Ship To and Supplier Item ID

Manage Requisitions

Requisition Search Keyword Search

▼ Search Requisitions

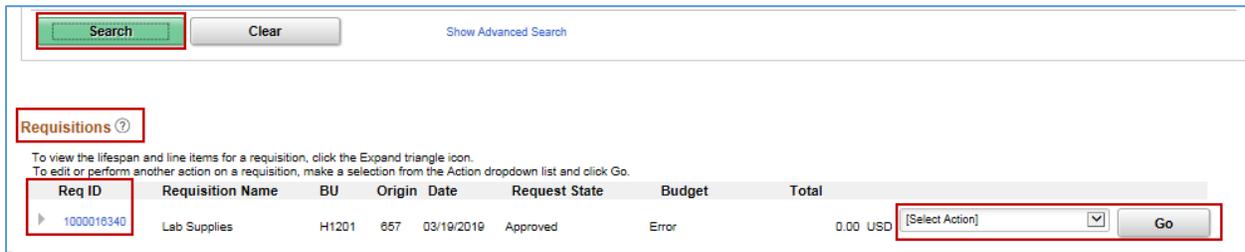
To locate requisitions, edit the criteria below and click the Search button.

Business Unit <input type="text" value="H1201"/>	Requisition Name <input type="text"/>	Origin <input type="text" value="657"/> Facilities Management	
Requisition ID <input type="text"/>	Request State <input type="text"/>	Budget Status <input type="text"/>	
Date From <input type="text" value="07/01/2018"/>	Date To <input type="text" value="03/19/2019"/>		
Requester <input type="text"/>	Entered By <input type="text"/>	PO ID <input type="text"/>	

Search
Clear
Show Advanced Search

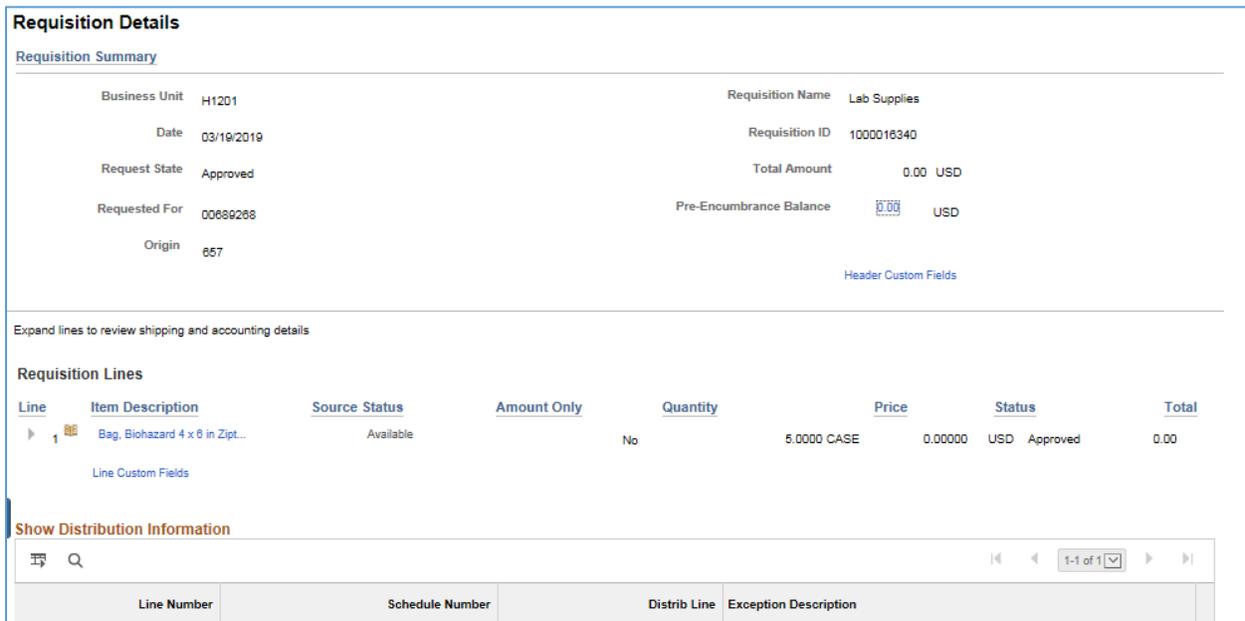
Step 3: Perform tasks on the Manage Requisitions page

SWIFT opens up a **Requisitions** list with the requisitions that matched your search criteria.



1. If you press the *Req ID* link, SWIFT brings you to the **Requisition Details** page.

You can get summary information but cannot make any changes to the requisition. At the bottom of the page, select the **Edit Requisition** button to get to the **Edit Requisition - Review and Submit** page to edit the requisition.



2. If you choose an option on the **Section Action** menu and press **Go**, SWIFT allows you to perform tasks on the requisition.

The available actions vary depending on the status of the requisition. They include the following: Approvals, Cancel, Check Budget, Copy, Edit, PreCheck Budget, View Cycle and View Print.

- a. **Approvals:** Displays the **Approval Status** page. You can get a summary of the requisition and its line details.

Approval Status

Business Unit H1201
 Requisition ID 1000016340
 Requisition Name Lab Supplies
 Requester
 Entered on 03/19/2019
 Status **Approved**
 Priority Medium
 Budget Status Error

Total Amount 0.00 USD

Requester's Justification
 No justification entered by requester.

[View printable version](#)

▼ **Line Information** ⓘ

- b. **Cancel:** Displays the **Requisition Details** page, which has a **Cancel Requisition** button. If you press the **Cancel Requisition** button, SWIFT displays a confirmation page. Enter a reason code and a comment for the cancellation.

Requisition Details for:

Business Unit H1201 Date 03/19/2019
 Requisition ID 1000016340 Status Approved
 Requisition Name Lab Supplies Total 0.00 USD

Line Details

Line	Item Description	Status	Price	Qty	Total
1	Bag, Biohazard 4 x 6 in, Ziptop with 2 x 3 l...	Approved	CASE	5.0000	

Cancel Requisition

- c. **Check Budget:** Initiates the budget processor and commit funds to pre-encumbrance amount for this requisition if the requisition passes the check.
- d. **Copy:** Displays the **Checkout - Review and Submit** page for a new requisition. SWIFT copies all line items to a new requisition. However, if one item was created from a special request, SWIFT displays another message.

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit H1201 Health Department Origin 657 Facilities Management Requisition Name
 *Requester *Currency USD Suggested Vendors Priority Medium
 Doc Type Agency Reference Billing Location Custom Fields

- e. **Edit:** Displays a warning message indicating that editing the requisition will restart the approval process. SWIFT displays the **Edit Requisition - Review and Submit** page for the requisition. SWIFT may create a change request for the requisition.

Edit Requisition - Review and Submit

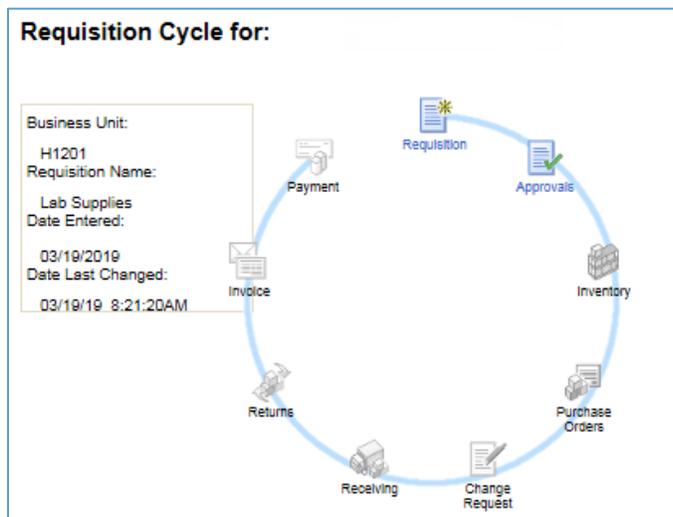
Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit: H1201	Health Department	Origin: 857	Facilities Management	Requisition Name: Lab Supplies
Requester: [Redacted]		Suggested Vendors: [Redacted]		Requisition ID: 1000016340
Currency: USD		Doc Type: OMR		Priority: Medium
		Agency Reference: Lab Supplies		Custom Fields
		Billing Location: H12LAB0000		

- f. **PreCheck Budget:** Initiates the budget processor and checks the budget without reserving funds for this requisition. This option enables you to check whether a budget exists for this requisition before committing amounts to a pre-encumbrance.
- g. **View Cycle:** Displays an image showing where the requisition is in its cycle. You can see the dates when the requisition was created and updated.



- h. **View Print:** Displays the print version of the requisition. SWIFT displays a message asking if you want the print version with distribution details. Press **Yes** or **No**. SWIFT displays a print copy of the requisition.

Business Unit: H1201		Requester: 00689268		Status: Approved			
Requisition: 1000016340		Requested By:		Currency: USD			
Requisition Name: Lab Supplies		Entered Date: 3/19/19		Requisition Total: 0.00			
Line: 1	Item Description: Bag, Biohazard 4 x 6 in Ziptop with 2 x 3 IN Absorbent Pad inserted	Quantity: 5	UOM: CA	Price: 0.00	Line Total: 0.00		
Line Status: Approved							
Ship Line: 1		Ship To: H12LABWHSE		Shipping Quantity: 5			
Attention: Udean,Dawn R		Due Date:		Shipping Total: 0.00			
Ship Via: GROUND		Freight Terms: FOB_PADD		Address:			
				MDH /MDA LAB BLDG 601 N ROBERT ST ST PAUL MN 55155-2538 United States			
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	H12FREEMAN	5	100.00	0.00	MN001	413005
		Dept	Fund				
		H1231499	2001				
		Open QTY	Open Amt				
		5.0000	0.000				
GL Base Amount		Currency	Sequence		Capitalize		
0.00		USD	0		N		
Chartfield 3							
H12203Y							

List of the Request State (i.e., status) fields on a requisition

- **Approved:** The requisition has been approved and is ready for sourcing. For this status to display at the header level, all lines of this requisition must be in an “Approved” status.
- **Canceled:** The requisition was entered and saved but then the entire requisition or each requisition line was canceled. For this status to display at the header level, all lines of this requisition must be in the “Canceled” status. A canceled requisition can be reopened within a certain number of days as specified for the purchasing Business Unit; otherwise, it is closed permanently.
- **Complete:** The requisition is marked complete after the requisition is dispatched on a purchase order. The goods are received and the supplier is paid. A background process identifies the requisitions and moves them to the “Complete” status. Canceled requisitions and those that are completely fulfilled by inventory stock are also identified as “Complete”.
- **Denied:** The entire requisition or each requisition line has been denied in the approval process. For this status to display at the header level, all lines of this requisition must be in the “Denied” status.
- **Open:** The requisition has been entered and saved but not yet submitted. For this status to display at the header level, all lines of this requisition must be in the “Open” status. A requisition in this status may not be sourced to another document, such as an event or Inventory Material Stock Request.
- **PO Partially Canceled:** The requisition contains some lines that have been placed on purchase orders and these purchase orders have subsequently been canceled. For this status to display, the purchase orders must all have the same status, “Canceled.” This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier.
- **PO Partially Completed:** The purchase order has been closed for some of the requisition lines, however the requisitions attached to it are not yet closed.
- **PO Partially Created:** The requisition contains some lines that have been sourced to an approved purchase order. For this status to display, the purchase orders must all have the same status of “Approved.” This status indicates that some of the requisition lines have not been

sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier.

- **PO(s) Created:** The requisition has been placed on a purchase order that has been approved. This header status indicates that all lines of this requisition have been sourced to approved purchase orders and the requisition line status is “PO(s) Created.” For this status to display, the purchase orders must all have the same status of “Approved.”
- **PO(s) Cancelled:** The requisition has been placed on a purchase order that has subsequently been canceled. This header status indicates that all lines of this requisition have been sourced to canceled purchase orders and the requisition line status is “PO(s) Canceled.” For this status to display, the purchase orders must all have the same status of “Canceled.”
- **PO(s) Completed:** The purchase order has been closed for all of the requisition lines, however the requisitions are not yet closed.
- **PO(s) Dispatched:** The requisition has been placed on a purchase order and the purchase order has been dispatched to the supplier. This header status indicates that all lines of this requisition have been sourced to dispatched purchase orders and the requisition line status is “PO(s) Dispatched.” For this status to display, the purchase orders must all have the same status of “Dispatched.”
- **Partially Dispatched:** The requisition contains some lines that have been placed on purchase orders and these purchase orders have been dispatched to the supplier. For this status to display, the purchase orders must all have the same status of “Dispatched.” This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier.
- **Partially Received:** The requisition contains some lines that have been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully or partially received. This status indicates that some of the requisition lines have not been received.
- **Pending:** The requisition has been submitted and is awaiting approval. This header status indicates that all lines of this requisition have the line status of “Pending.”
- **Received:** The requisition has been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully received. For this status to display at the header level, all lines of this requisition must be in the “Received” status.
- **See Lines:** The lines of this requisition are in various stages of the approval process and the lines have different statuses (i.e. pending, approved, denied, and so on); however, none of the lines have been sourced to a purchase order.

You have successfully viewed the Manage Requisition page in the EProcurement module.