

How to Split Funding on a Requisition

There are two ways to split the funding on a requisition.

- **Accounting Tags Templates**
Use Accounting Tags templates to add distribution lines in creating a new requisition and updating an existing one. There are nine templates starting with “REQ” that are available for adding up to ten distributions.
- **Mass Change Process**
The Mass Change process allows you to make changes to multiple distribution lines using one process.

This guide provides an overview on how to split funding using Accounting Tag templates and the mass change process.

IMPORTANT! Carefully follow the steps from the [EProcurement/Requisitions](#) Quick Reference Guides to create and process requisitions with split funding.

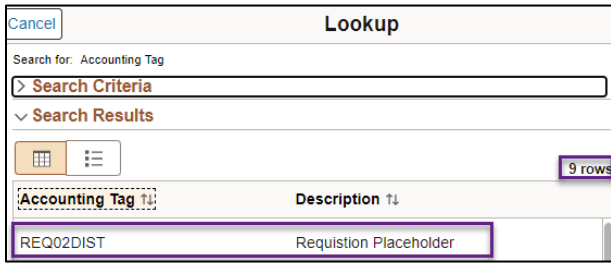
Accounting Tags Templates

Follow the steps for creating a requisition by **Document Type**. You can find the quick reference guides for them on the [EProcurement/Requisitions](#) Quick Reference Guides webpage.

1. Enter requisition information on the Requisition Defaults page.
2. Use the **Distribution Defaults** section to access the Accounting Tags templates.
 - a. In the **Accounting Tags** section, enter “REQ” and select the **Lookup** icon. It looks like a looking glass.

The screenshot shows the 'Requisition Defaults' page in a web application. At the top, there is a navigation bar with a refresh icon, a star icon, and a search box labeled 'Search in All Content'. Below the navigation bar, the page title 'Requisition Defaults' is displayed. A green banner contains the text 'Welcome to the Administrative Portal' and a 'Sign Out' link. A 'Cancel' button is visible. The main content area has a sidebar with expandable sections: 'Header Defaults', 'Line Defaults', 'Shipping Defaults', and 'Distribution Defaults'. The 'Distribution Defaults' section is expanded, showing an 'Accounting Tag' field with the value 'REQ' and a search icon.

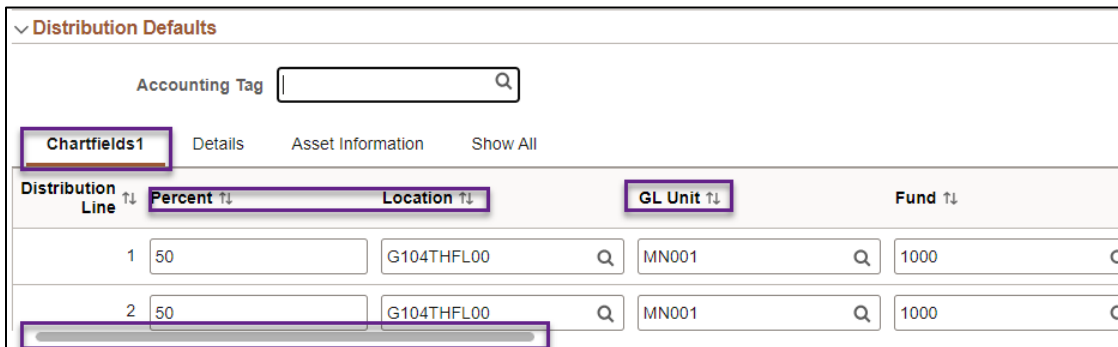
- b. SWIFT opens the existing Accounting Tag templates. Select the template that adds the number of lines you need. For example, "REQ02DIST" adds two lines.



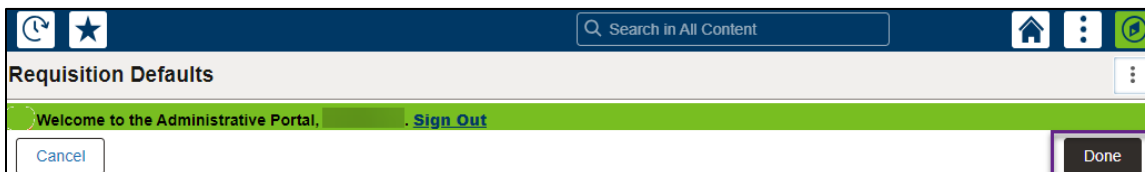
- 3. SWIFT returns to the Requisition Defaults page.
 - It created distribution lines in the Chartfields1 tab in Distribution Defaults section.
 - It populated Percent and distributed that by the number of lines.
 - It also populated the GL Unit and Fund.

 - a. Update fields as appropriate. Use the scroll bar at the bottom of the page to scroll to the right for all the chartfields.

NOTE: In the example, you can see that the distributions are split in the different lines.



- b. After you complete the defaults sections, go to the top of the page. Select **Done**.

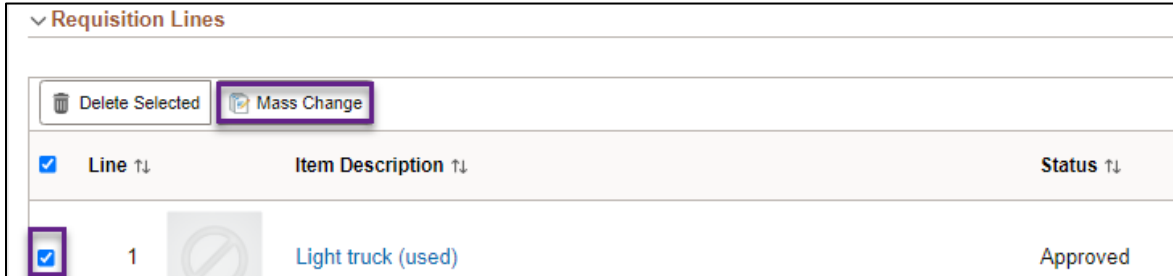


- 4. Continuing processing the requisition with the updated distribution lines.

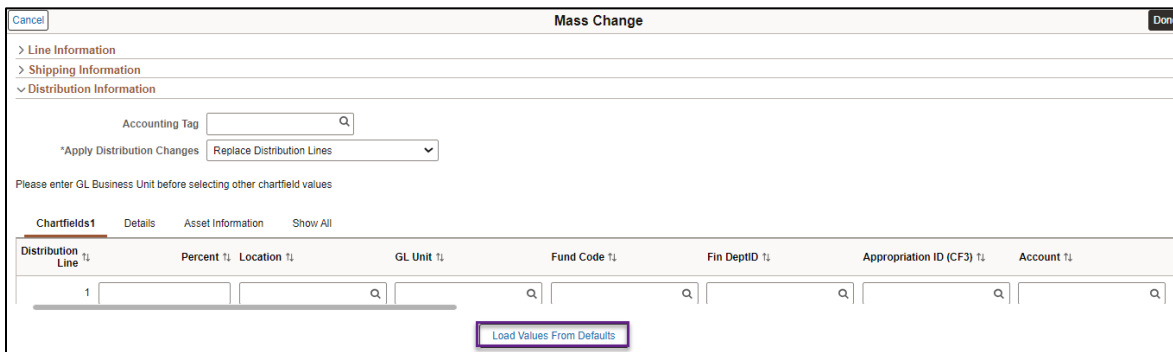
Mass Change Process

Make sure to use the quick reference guide for the full steps on using the Mass Change icon for creating or editing a requisition on the [EProcurement/Requisitions](#) Quick Reference Guides webpage.

1. In the Requisition Lines section, go to the **Distribution Lines** section. Check the box next to the lines you wish to edit. Then, select the **Mass Change** button.



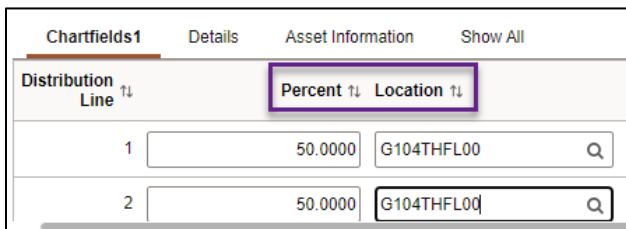
2. SWIFT opens the Mass Change window. At the bottom of the page, select the **Load Values from Defaults** button.



3. 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. **Chartfields:** For changes to chartfields, select the **Chartfields1** tab.
 - i. If you are updating chartfield lines, make sure to add the changes to the Percent field to allocate the amounts attached to the lines.
 - ii. Make sure the Location field is populated for all lines.

NOTE: In the example below, you can see that the distributions are split in the different lines.



- b. **Add a line:** 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.

Chartfields1 **Details** Asset Information Show All

IN Unit ↓ Budget Date ↓ Stat ↓

01/31/2024

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

Cancel Mass Change Done

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

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

Retrofit field changes to the selected existing requisition lines/schedules not already sourced to POs.

OK Cancel

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