SWIFT
Statewide Integrated Financial Tools

QUICK REFERENCE GUIDE

Amending an Event via an Edit or a New Version

January 22, 2013; Revised July 15, 2013

After an event is approved and posted, it may need to be amended or changed for a variety of reasons. This can be done either by editing the event, or by creating a new version. Any changes made must follow state and agency guidelines and regulations.

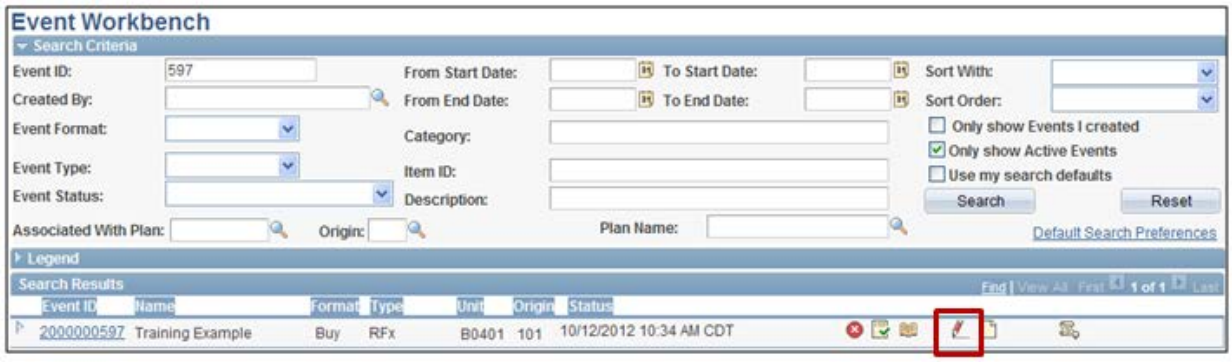
Amending an Event via an Edit

Amending an event using the edit functionality should only be used if you are not going to require the responders to submit a new response due to a change. This method is the best option if the change is minor such as an updated description, additional attachments that do not impact a previous response, date extensions, or adding additional vendors to participate.

An amendment can be done via an edit by following the below steps:

Note: Editing an event currently pending approval will force the event to restart the approval process, regardless of how far the approval has progressed.

1. **Navigation:** Sourcing, Maintain Events, Event Workbench
2. Search for the event you wish to edit
3. Click the **Edit icon**



4. The Event Details page will open and event can be updated as necessary

The following fields can be changed when editing an event:

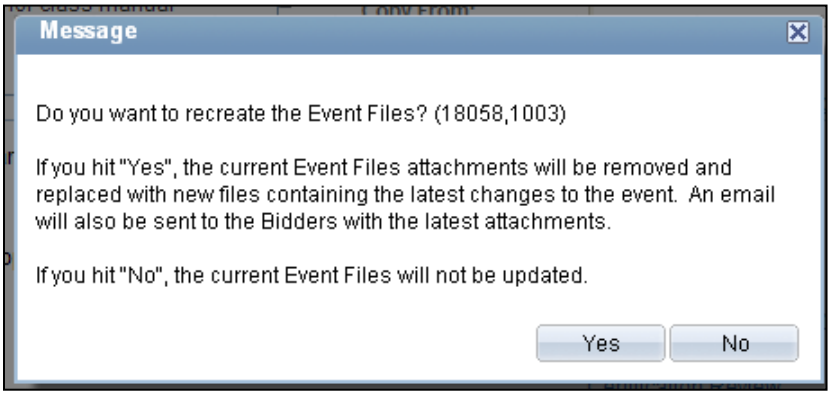
- **Event Summary** Section
  - Estimated Price
  - Description
  - Preview Date
  - Start Date
  - End Date
- Event Settings *and* Options Page
  - All details can be updated
- Payment Terms *and* Contact Info page

  - Origin
  - Event Contact Details (Does not include the buyer)
- *Event Comments and Attachments* page
  - All Comments
  - All attachments except those generated by SWIFT
- *Event Header Bid Factors* page
  - No changes allowed
- *Line Items* Page
  - Line bid factors can be updated or deleted
  - Additional line bid factors can be added
- *Bidder Invitations* Page
  - Additional bidders can be added
  - Existing bidders can be removed

5. Update the Description field identifying any pertinent changes to the event

   Note: It is important to inform the responders and potential responders of any changes. The individual situation for each event as well as agency guidelines may determine what needs to be done to the event when changes are made. If you are required to identify what was changed in the event then you will want to update the description field so those viewing the event will be able to easily tell what was changed. The more detailed the description, the easier it is for the responders or potential responders to locate the changes.
6. Click the **Bidder Invitations** link
7. Verify whether previously invited vendors should be notified and check or uncheck Renotify box as appropriate
8. Click **Return to the Event Overview** link
9. After all changes have been made, click **Save Event**

   A confirmation message will appear asking to recreate the event files. This refers to the PDF version automatically created and attached to the event when it was first created.
10. Click **Yes**



11. A message will appear asking if you would like to notify bidders of changes, click **Yes** to notify
    a. Only those vendors that have the *Renotify* checkbox selected will receive a notification

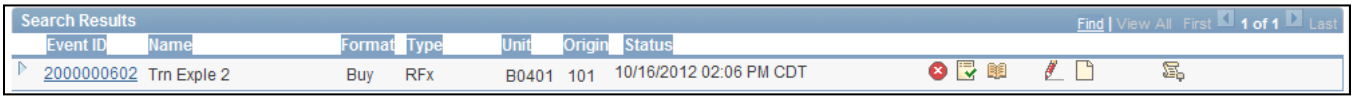
Amendment via a New Version

Amending an event using a new version should be used whenever there has been a change that would require responders to submit a new response.

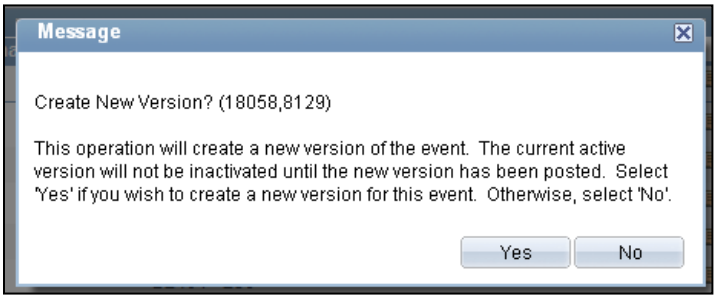
An amendment can be done via a new version by following the below steps:

Note: Creating a new version on an event currently pending approval will force the event to restart the approval process, regardless of how far the approval has progressed. If the event has been fully approved, the new version will require full approval.

1. **Navigation:** Sourcing, Maintain Events, Event Workbench
2. Locate the event for which you wish to create a new version



3. Click the **New Version** icon
4. A confirmation message will appear asking if you want to create a new version, click **Yes** to continue



5. The *Event Details* page will open and event can be updated as necessary

The following fields can be changed when creating a new version of an event:

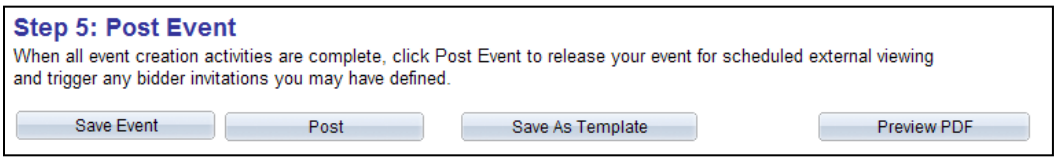
- *Event Summary* Section
  - Procurement Type
  - Estimated Price
  - Description
  - Preview Date
  - Start Date
  - End Date
- *Event Settings and Options* Page
  - All details can be updated
- *Payment Terms and Contact Info* page
  - Origin
  - Event Contact Details (Does not include the buyer)
- *Event Comments and Attachments* page
  - All Comments
  - All attachments except those generated by SWIFT
- *Event Header Bid Factors* page
  - No Changes Allowed

- *Line Items* Page
    - Description
    - Category
    - Unit of Measure (if price schedule is not used)
    - Quantity (if price schedule is not used)
- *Bidder Invitations* Page
    - Additional bidders can be added
    - Existing bidders can be removed
- *Event Collaborators* Page
    - New version can be routed for collaboration as needed

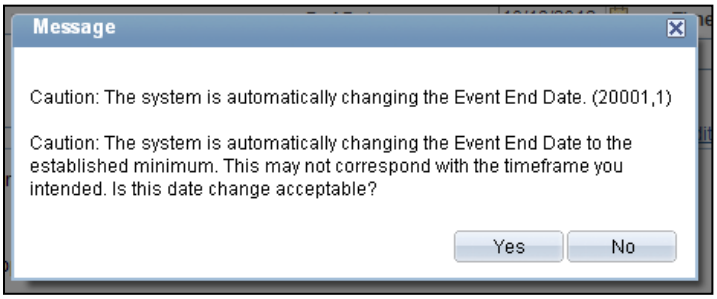
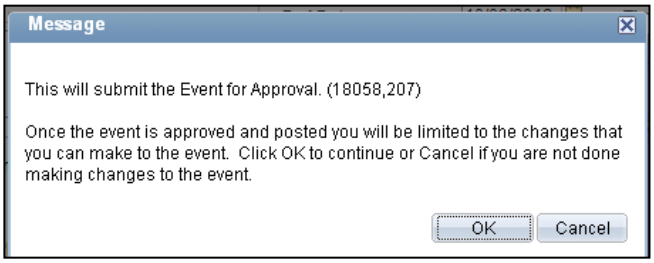
6. Update the Description field identifying any pertinent changes to the event

   Note: It is important to inform the responders and potential responders of any changes. The individual situation for each event as well as agency guidelines may determine what needs to be done to the event when changes are made. If you are required to identify what was changed in the event then you will want to update the description field so those viewing the event will be able to easily tell what was changed. The more detailed the description, the easier it is for the responders or potential responders to locate the changes.

7. Click the **Bidder Invitations** link
8. Verify that previously invited vendors will be notified by checking the *Renotify* box
9. Click **Return to the Event Overview** link
10. After the changes have been made, click **Save**
11. Click **Post**



A system generated message will appear asking to automatically change the end date. If it should remain as is, select **No**. If the end date should be changed based on the procurement type and estimated price settings, select **Yes.**



Once the event is posted, it will need to be routed through approvals. All individuals who participated in the initial approval process for the previous version will also need to approve the new version; this includes system assigned as well as ad-hoc approvers.