

## QUICK REFERENCE GUIDE

February 20, 2024

### Close an Event Line in a Pending Status

Buyers should review their events in SWIFT on a regular basis. Agencies may have events with lines they did not award and no longer need, or that they decided to only partially award. SWIFT leaves these events in a “Pending Award” status. This means that the event has not been completely awarded. Having events with lines that are not awarded can be a problem during audits.

If an event is tied to a requisition, the pre-encumbered funds remain tied to the event. Once you close these lines, SWIFT will free up any remaining unused requisition lines. You can re-source these lines to another event or you can cancel them. You can use the remaining pre-encumbrances elsewhere.

To complete events that agencies no longer need, agencies should close event lines. SWIFT will change the status of those lines not awarded from “Open” to “Closed.”

This Quick Reference Guide lists the steps to close an event line in a Pending Status

### Step 1: Find Awarded events with open lines in the Event Workbench













1. Navigate to the **Event Workbench** page

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left menu, Menu, Sourcing, Event Workbench page.

2. On the Event Workbench page, set the **Event Status** dropdown to “Pending Award” and select the **Search** button.

The screenshot shows the 'Event Workbench' search interface. Under the 'Search Criteria' section, the 'Event Status' dropdown menu is open, showing 'Pending Award' as the selected option. The 'Search' button is highlighted with a red rectangular box. Other visible fields include Business Unit, Event ID, Created By, Event Format, Event Type, From Start Date, To Start Date, From End Date, To End Date, Category, Item ID, Description, Plan, Sort With (End Date), Sort Order (Ascending), and checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults'.

3. In the Search Results, press the **Analyze Bids** icon for each event to review.

Search Results							1-4 of 4		View All
Event ID	Name	Format	Type	Unit	Origin	Status			
2000013956	Plan Administratio...	Buy	RFx	G1001	511	Pending Award			
2000014203	Dental Plan Admini...	Buy	RFx	G1001	511	Pending Award			
2000015240	Sit/Stand Workstat...	Buy	RFx	G1001	509	Pending Award			
2000015290	Sit/Stand Desks -t...	Buy	RFx	G1001	509	Pending Award			

4. SWIFT displays the Analyze Total page. Look at the event to see if you still need it.
  - a. If you do, follow up using agency guidelines.
  - b. If you do not need it, please follow the remaining steps.

## Step 2: Update the Status on the event on the Analyze Line page

1. On the top of the Analyze Total page, select the **Analyze Line** link.

### Analyze Total

Analyze Total **Analyze Line**

Business Unit:      Origin      Event ID:      Round:      Version:      Event Name:

2. On the Analyze Line page, go to the **Line Items** section.
  - a. Change the **Line Status** from “Open” to “Closed.”
  - b. Press the **Save** button at the bottom of the page.

### Line Items

Line    Item ID    Description    Category    UOM    Start Price    Requested Qty    Qty Awarded    Weighting    Line Status

1		Ergotron Workfit S-Dual Sit & Stand Workstation OR Approved Equal	56111500	EA	485.00000	10.0000	10.0000	100.00000	Closed
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Save    Return to Search

## Step 3: View the updated Status on the Analyze Total page

1. At the top of the Analyze Line page, press the **Analyze Total** link.

### Analyze Line

**Analyze Total**      Analyze Line

Business Unit:      Origin      Event ID:      Round:      Version:      Event Name:

2. SWIFT updates the Status of the award to either “Awarded” or “Not Awarded.”

- **Awarded Status:** All lines have a Status of “Closed” and at least a portion of the event has been awarded.
- **Not Awarded Status:** All lines have a Status of “Closed” and none of the lines have been awarded.

### Analyze Total

Analyze Total

Analyze Line

Business Unit:	Origin	Event ID:	Round:	Version:	Event Name:	
G1001	509	2000015290	1	1	Sit/Stand Desks -	<input checked="" type="checkbox"/> External Bid Tab
Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:	<input type="checkbox"/> Make Tabulation Public
Buy	RFX	USD	02/22/2024 2:46PM CST	Awarded	...	

[Bid Analysis and Display Options](#)

3. If you have lines with a remaining quantity that you closed, you can reopen those lines by changing the Status to “Open.” SWIFT will automatically change the Status to “Pending Award” when you save the event.