

QUICK REFERENCE GUIDE

Updated November 1, 2019

Close an Event Line in 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 sourcing 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”.

Steps to complete:

- Step 1: Find Awarded events with open lines in the Event Workbench
- Step 2: Access an individual event
- Step 3: Update the Status on the Analyze Line page
- Step 4: View the updated Status on the Analyze Total page

Steps to close an event line in 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
Navigation Collection	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, Left 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 selected and set to 'Pending Award'. The 'Search' button is highlighted with a red box. Other search criteria 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, Associated With, Origin, and Plan. There are also checkboxes for 'Only show Events I created', 'Only show Active Events', and 'Use my search defaults', and a 'Reset' button.

Step 2: Access an individual event

- On the **Search Results**, press the **Analyze Bids** icon for each event to review.

Event ID	Name	Format	Type	Unit	Origin	Status	Analyze Bid icon
2000004375	Enterprise Learnin...	Buy	RFx	G1001	511	Pending Award	

- Look at the event to see if you still need it. If you do, follow up using agency guidelines.
- If you do not need it, please follow the remaining steps.

Step 3: Update the Status on the event on the Analyze Line page

SWIFT displays the **Analyze Total** page. Select the **Analyze Line** link on the top of the page.

Business Unit:	Origin:	Event ID:	Round:	Version:	Event Name:
R2901	A29	2000001742	1	1	DNR JOINT POWERS- Jack Pine Sealings

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

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1		Electronic Licensing System	81111810	EA	0.01000	1.0000	0.0000	100.00000	Closed	Analyze

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

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

Business Unit:	Origin:	Event ID:	Round:	Version:	Event Name:
R2901	A24	2000007077	1	1	DNR RFP Electronic Licensing System (ELS)

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

Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Buy	RFx	USD	07/20/2017 2:00PM CDT	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.

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.

You have successfully closed an event line in a “Pending” Status and changed its status.