

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### Create an Event from a Previous Event

As a time saver, you can create a new event from a previous event. If the lines of an event are similar to one previously created, you can copy the lines from a previous event into a new one. SWIFT will copy in the lines. SWIFT will also copy in bid factors if you desire. This process is very similar to creating a basic event.

This guide lists the basic steps to create an event from a previous event. Please review the Create an Event reference guide for further assistance.

Steps to complete

- Step 1: Access the Event Summary page
- Step 2: Enter information on the header of the Event Summary page
- Step 3: Enter information on the Enter Copy Criteria page
- Step 4: Enter lines on the new event
- Step 5: Complete the remaining sections on the event

### Steps to create an event from a previous event

#### Step 1: Access the Event Summary page

1. Navigate to the **Add a New Value** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value tab.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, Left Menu, Sourcing, Create Events page, Add a New Value tab.

2. On the **Add a New Value** page, enter the following information and press the **Add** button.
  - *Business Unit*
  - *Origin*
  - *Event ID* should remain as "NEXT"
  - *Event Format*: "Buy"
  - *Event Type*: RFX

SWIFT displays the **Event Summary** page.

## Step 2: Enter information on the header of the Event Summary page

- On the **Event Summary** page, enter the following information on the header.
  - Procurement Type* is a required field. Select the appropriate value from the list.
  - Populate the *Event Name* and *Description*. You can enter the *Preview Date*, *Start Date* and *End Date* or allow them to default.
  - The *Event End Date* defaults to one week after the *Preview* and *Start Dates*.
- On the **Copy From** menu, select “Sourcing Event” from the dropdown list and press **Go**.

SWIFT displays the **Enter Copy Criteria** page.

## Step 3: Enter information on the Enter Copy Criteria page

- On the **Enter Copy Criteria** page, enter the following information in the **Select Criteria** section:
  - Business Unit*: Enter or confirm the business unit of the event from which the lines will be copied.
  - Copy Method*: Choose one of the following options.
    - “Append”: Add copied lines and bid factors to existing lines of the event
    - “Override”: Replace any existing lines and bid factors with copied information
  - Event ID*: Enter the *Event ID* or select the **Looking Glass** icon to search for the event.

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- Select **Copy Event Factors\Constraints** checkbox if you want to copy in bid factors along with event lines.
- Press the **Search** button.

**Create an Event**  
**Enter Copy Criteria**

**Copy Template**  
Copy From: Sourcing Event

**Select Criteria**  
Business Unit: R2901  
\*Copy Method: Append  
Event Type: RFx

**Copy Criteria**  
Event ID: 2000008943  
Round: 1  
Version: 1  
SetID:  
Category:

Event Name:  
Bidder Type:  
Bidder ID:  
Item ID:  
 Copy Event Factors\Constraints

**Search**

## Step 4: Enter lines on the new event

SWIFT opens up the **Event Lines to Copy** page.

1. Check the **Sel** box to select the lines to copy. You can also press the **Select All** link to select all lines. You can press the **Deselect All** link to unselect all lines.
- At the bottom of the page, press the **OK** button.

**Event Lines to Copy**

Select All  Deselect All

Select Lines

Sel	Item	Group ID	Description	Quantity	UOM	Price	Currency	Business Unit	Event ID	Due Date	Ship To
<input checked="" type="checkbox"/>			Schizachyrium scoparium	150.0000	LB	0.75000	USD	R2901	2000008943	01/13/2019	R291000221
<input checked="" type="checkbox"/>			Bouteloua gracilis	4.0000	LB	0.75000	USD	R2901	2000008943	01/13/2019	R291000221
<input checked="" type="checkbox"/>			Bouteloua curtipendula	9.0000	LB	0.75000	USD	R2901	2000008943	01/13/2019	R291000221

2. SWIFT displays the **Line Items** page.

- Confirm the details on both the **Basic Definition** and **Advanced Definition** tabs.

Line	Item ID	Description	Category	UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Bouteloua gracilis	10121800	LB	4.0000	0.7500	\$3.00	0.00000
2		Bouteloua curtipendula	10151700	LB	9.0000	0.7500	\$6.75	0.00000
3		Elymus canadensis	10151700	LB	22.0000	0.7500	\$16.50	0.00000
4		Elymus trachycalyx	10151700	LB	20.0000	0.7500	\$15.00	0.00000
5		Koeleria macrantha	10151700	LB	5.0000	0.7500	\$3.75	0.00000

Event Total: 45.0000 USD  
 Group Selected Lines: [Dropdown] [OK]  
 Line Weighting Total: 0% Remaining Weight: 100%  
 < Return to Event Overview [Go To] [Go]  
 Save Event Changes

Press the **Save Event Changes** button. SWIFT will display the *Event ID*.

- Press the **Return to Event Overview** link.

## Step 5: Complete the remaining sections on the event

SWIFT returns you to the **Event Summary** page.

1. Review and update the **Define Event Basics** section. On the **Event Header Bid Factors** page, make sure that the *Weighting* totals "100" if you copied or entered any bid factors.
2. Review and update the **Select Bidders to Invite** section. Make sure that the **Public Event** box is checked if you want this event to appear on the Supplier Portal for public bids.
3. Review and update the **Invite Collaborators** section if you are going to use pre-post Collaboration.
4. Post the completed event.

SWIFT posts the event on the Supplier Portal for bidders to review.

Event ID	Name	Format	Type	Unit	Origin	Status
2000008885	DNR RFB Supplies	Buy	RFX	R2901	A12	11/29/2018 02:06 PM

**You have now successfully completed an event by copying it from a previous event.**