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.

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
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<tbody>
<tr>
<td>Navigation Collection</td>
<td>Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value tab.</td>
</tr>
<tr>
<td>WorkCenter</td>
<td>Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, Left Menu, Sourcing, Create Events page, Add a New Value tab.</td>
</tr>
</tbody>
</table>

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

1. 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**.

2. On the **Copy From** menu, select “Sourcing Event” from the dropdown list and press **Go**.

Step 3: Enter information on the Enter Copy Criteria page

1. 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.
• Select Copy Event Factors/Constraints checkbox if you want to copy in bid factors along with event lines.
• Press the Search button.

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.

2. SWIFT displays the Line Items page.
• Confirm the details on both the Basic Definition and Advanced Definition tabs.
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.

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