

## 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.

### 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 page.
<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

The screenshot shows the 'Add a New Value' form with the following fields and values:

- \*Business Unit: G1001
- \*Origin: [Search Icon]
- \*Event ID: NEXT
- Event Round: 1
- Event Version: 1
- \*Event Format: Buy
- \*Event Type: RFx
- Proxy Bidding (Auctions Only): Disabled

Buttons: Find an Existing Value (top right), Add (bottom left).

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

1. SWIFT displays the Event Summary page. Enter the following information on the header.
  - a. **Procurement Type** is a required field. Select the appropriate value from the list.
  - b. Populate the **Event Name** and **Description**.
  - c. You can enter the **Preview Date**, **Start Date** and **End Date** or allow them to default.
  - d. The Event End Date defaults to one week after the Preview and Start Dates.

Event Type RFx [Change to Auction](#)

Event Status Open

Time Zone CST

\*Procurement Type ALP RFB

\*Event Name Sit/Stand Workstations

Description Ergotron Worklist S- Dual Sit/Stand Workstations or approved equal

Preview Date 01/18/2024 Time 8:46AM

Start Date 01/18/2024 Time 8:46AM

End Date 01/25/2024 Time 8:46AM

Copy From

- Delimited File
- Item Master
- Request For Information
- Requisition
- Sourcing Event
- Sourcing Template

Go

Required fields reside on pages marked with an asterisk (\*) -- you may not save your event until all required fields are filled.

[Step 1: Define Event Basics](#)

[Enter basic information, general settings and optional rules for this event.](#)

2. In 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. SWIFT displays the Enter Copy Criteria page. Enter the following information in the **Select Criteria** section.
  - a. **Business Unit**: Enter or confirm the business unit of the event from which the lines will be copied.
  - b. **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
  - c. **Event ID**: Enter the Event ID or select the Looking Glass icon to search for the event.
  - d. Select **Copy Event Factors\Constraints** checkbox if you want to copy in bid factors along with event lines.
2. Press the **Search** button.

### Enter Copy Criteria

**Copy Template**  
Copy From: Sourcing Event

**Select Criteria**  
 Business Unit: G1001  
 \*Copy Method: Override  
 Event Type: RFX

**Copy Criteria**

Event ID: 2000001066  
 Round: 1  
 Version: 1  
 SetID:  
 Category:

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

## Step 4: Enter lines on the new event

1. SWIFT opens up the Event Lines to Copy page.
  - a. Check the **Sel** box to select the lines to copy.
  - b. You can also press the **Select All** link to select all lines.
  - c. You can press the **Deselect All** link to unselect all lines.
  - d. 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"/>			Ergotron Workfit S-Dual Sit & Stand Workstation OR Approved Equal	22.0000	EA	485.00000	USD	G1001	2000001066	03/31/2013	G104THFL00
<input checked="" type="checkbox"/>			Workstation Installation	30.0000	EA	60.00000	USD	G1001	2000001066	03/31/2013	G104THFL00

Create Line Group

2. SWIFT displays the Line Items page.
  - a. Confirm the details on both the **Basic Definition** and **Advanced Definition** tabs.
  - b. Press the **Save Event Changes** button. SWIFT will display the Event ID.
  - c. Press the **Return to Event Overview** link.

Line Items ⓘ

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	We
<input type="checkbox"/> 1	<input type="text"/>	Engotron Workfit S-Dual Sit & Stand	58111500	EA	10.0000	485.0000	\$4,850.00	
<input type="checkbox"/> 2	<input type="text"/>	Workstation Installation	72101501	EA	10.0000	80.0000	\$800.00	

Event Total: 5450.0000 USD Line Weighting Total: 0 % Remaining Weight: 100%

Group Selected Lines

GoTo

## 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. **Post** the completed event.

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