

## QUICK REFERENCE GUIDE

June 5, 2026

### Create an Event from a Requisition

This Quick Reference Guide explains how to create an event from a requisition.

When agencies plan to purchase goods that costs more than \$10,000, they may need create a requisition to pre-encumber the funds. After creating a requisition for this purpose, SWIFT will allow you to copy it into the Strategic Sourcing (SS) module while creating an event.

- To create an event from a requisition, use the Open Market Requisition (OMR) document type.
- Once you create an event by copying a requisition, that requisition is no longer available for further processing in SWIFT.
- Requisitions or requisition lines copied into events can be amount-based or quantity-based.
- You can also copy lines from multiple requisitions into an event. For each requisition line copied, SWIFT will create a separate line on the event. However, if one requisition line description is identical to another, SWIFT will create a single line with the combined requested quantity.

**IMPORTANT.** Events created from requisitions can be awarded only via purchase orders.

### Step 1: Create a requisition in the EProcurement module

1. Create an OMR requisition in the EProcurement (EPro) module. See [Create an Open Market Requisition](#) Quick Reference Guide for more details.
2. After creating an OMR requisition, make sure the Confirmation page shows the following Statuses for the requisition:
  - a. The Status field must have an “Approved” status.
  - b. The Budget Status field must have a “Valid” status.

▼ Requisition Summary	
Requisition Name	Kawasaki Mules
Business Unit	R2901
Requisition ID	1000013126
Requisition Date	04/11/2024
Request State	Approved
Requester	
Entered By	
Budget Check Status	Valid
Total Amount	120000.00 USD
Pre-Encumbrance Balance	120000.00 USD

## Step 2: Create a new event in the Strategic Sourcing module

1. Navigate to the **Create Events** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event. The Create Events page defaults.

2. On the **Add a New Value** tab, enter information in the following fields.

**Fields in the header.** Required fields are marked with an asterisk (\*).

Field Name	Field Description
* <b>Business Unit</b>	The agency responsible for the event.
* <b>Origin</b>	The area in the agency responsible for the event.
* <b>Event Format</b>	Buy. Used to create Request for Bid (RFB) and Request for Proposal (RFP)
<b>Event Type</b>	RFx (Default setting to "Request For ..."). Do not use Auction.

3. Press the **Add** button.

**Create Events**  
**Add a New Value**

\*Business Unit R2901

\*Origin

\*Event ID NEXT

Event Round 1

Event Version 1

\*Event Format Buy

\*Event Type RFx

Proxy Bidding (Auctions Only) Disabled

Add

## Step 3: Add the event to SWIFT

1. The Event Summary page displays. Enter information in the following header fields.

**Fields in the header of the Event Summary page.** Required fields are marked with an asterisk (\*).

Field Name	Field Description
* <b>Procurement Type</b>	The type of procurement, such as ALP RFB (Authority for Local Purchase Request for Bid).
* <b>Event Name</b>	The name of the event, such as MMB RFB Conference Room Chair.
* <b>Description</b>	<p>Detailed description of the event. For example:</p> <p>This event is for MityLite Tables and Chairs. See the line items for specifications or any approved equal substitutes.</p> <p>THIS IS A FORMAL EVENT/SOLICITATION. Responders must submit their bids on the Supplier Portal. No non-electronic or e-mail responses will be accepted. The response must be submitted no later than the date and time called for in the Finish Time in the Event Details.</p> <p>Your bid is not submitted until you select the 'Submit Bid' button. You will receive a confirmation message when your bid has been submitted. Print and save your confirmation.</p> <p>SWIFT CONTRACTOR ASSISTANCE HELPDESK. Contractors needing help with registration and/or completing their response to this Event in the Supplier Portal may contact the Contractor Assistance Helpdesk: 651.201.8100, Option 1.</p> <p>If your response does not comply with the solicitation requirements, it will be rejected. MMB will award the event to the lowest responsible bidder that meets the specifications and all terms and conditions. The State of Minnesota reserves the right to award items separately, by grouping items, or by total, whichever is deemed most advantageous to the State.</p> <p>Thank you for your interest and participation.</p> <p><b>Note:</b> Suppliers who are registered only as bidders must register as suppliers before being awarded an event.</p>
* <b>Preview Date</b>	<p>Date when bidders will be able to preview the event on the Supplier Portal.</p> <p><b>Note:</b> The Office of State Procurement recommends always keeping the Preview Date and the Start Date as the same date.</p>
* <b>Start Date</b>	Date when bidders will be able to submit bids for the event on the Supplier Portal.

Field Name	Field Description
* End Date	Date when the event will close on SWIFT and no longer be open for bidding.  <b>Note:</b> The End Date defaults to seven calendar days after the Preview Date and Start Date. You may need to extend that date for a longer period, depending on ALP requirements.

- In the **Copy From** field, select “Requisition” from the drop-down list and press the **Go** button.

The screenshot shows the SWIFT event creation interface. The following fields are highlighted with purple boxes:

- \*Procurement Type:** ALP RFB
- \*Event Name:** Kawasaki Mules
- Description:** THIS IS A FORMAL SOLICITATION.
- Preview Date:** 06/06/2024
- Start Date:** 06/06/2024
- End Date:** 06/13/2024
- Copy From:** Requisition
- Go button:** A blue button labeled "Go".

## Step 4: Copy requisition lines on to the event

- The Enter Copy Criteria page displays. Enter the following information in the Copy Template, Select Criteria , and Copy Criteria sections.

### Fields in the Enter Copy Criteria page

Field Name	Field Description
Copy From	Select “Requisition.”
Business Unit	Enter the agency number for the event
Copy Method	<ul style="list-style-type: none"> <li>Select “Append” to add copied lines and bid factors to existing lines of the event.</li> <li>Select “Override” to replace any existing lines and bid factors with copied information.</li> </ul>
Select Lines	Select “Req Lines.”
Requisition ID	Enter the identification number for the requisition. <b>Note:</b> If you use the Look Up Glass to search for requisitions, only requisitions with an available Source Status (those not yet sourced to an event) will appear in the returned results

- Press the **Search** button.

Create an Event

## Enter Copy Criteria

Copy Template

Copy From Requisition

Select Criteria

Business Unit R2901

\*Copy Method Override

Select Lines Req Lines

Copy Criteria

Requisition ID 1000013126

Buyer

SetID

Category

☐ Exclude Auto Source Item

☐ Include Inventory Items

Search

3. SWIFT displays the Requisition Lines to Copy page.
  - a. Check mark the **Sel** box to select a line to copy.
  - b. Press the **OK** button.

Requisition Lines to Copy

☒ Select All ☐ Deselect All

Select Lines

☐ ☐

Sel	Item SetID	Item	Description	Quantity	UOM	Price	Currency	Due Date
<input checked="" type="checkbox"/>	SHARE		NEW KAWASAKI MULE PRO-DXT FE DIESEL EPS	4.0000	EA	30000.00000	USD	10/31/2024

☐ Create Line Group

OK Cancel Refresh

4. The Line Items page displays.
5. Verify all the details on the Basic Definition tab and Advanced Definition tab are correct.
6. Then select the **Return to Event Overview** link.

Line Items

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount
1		NEW KAWASAKI MULE PRO-DXT	25101905	EA	4.0000	30000.0000	\$120,000.00

Event Total: 120000.0000 USD Line Weighting Total: 0 % Remain

Group Selected Lines OK

< Return to Event Overview GoTo

Save Event Changes

## Step 5: Save line item information and complete the event

- At the bottom of the page, press the **Save Event** button.
- SWIFT will generate an Event ID, which is on the top of the page.

Create an Event

Event Summary

Business Unit R2901 Event ID 2000015901 Round 1 Version 1 Event Format Buy

Origin A73 MR Fleet CO

- Complete the remaining steps for the event.
  - Define the event basics.
  - Invite bidders to the event.
  - Post the event.

For more information, view the [Create an Event](#) Quick Reference Guide for instructions on how to complete these steps.