

## QUICK REFERENCE GUIDE

November 1, 2019

### Create an Event by Uploading a Delimited File

When you set up an event in SWIFT Strategic Sourcing module, make sure that each event line calls out the specific good or service that you need. Also, include the desired quantity and the approximate price the buyer believes the line should cost. This allows buyers and suppliers to accurately depict what the quantity and pricing is for each desired good or service.

When agencies need to create an event with a large number of lines, SWIFT has a process that allows buyers to use a spreadsheet to load those lines into a new SWIFT event. Suppliers can use this same process to bid on each event line.

This process requires uploading a standard delimited file, which is similar to a spreadsheet.

- Each column title must remain “as is”.
- You cannot change the column titles, field sizes or data types, or rearrange the column order on the template used to upload the data into the event lines.
- **IMPORTANT!** The key to this upload is to do a “Save as” on the sheet as a tab delimited file.txt.

Below is an example of the delimited file for uploading lines to an event. The required fields are marked with Required Field and marked in yellow.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
INV_ITEM_ID Used only for inventory items.	DESCR254_MIXED Description of Item (up to 254 characters). <b>Required field</b>	CATEGORY_CD D Category Code (8 characters such as "10151700") <b>Required field</b>	UNIT_OF_MEASURE Unit of Measure (up to 2 characters such as "EA") <b>Required field</b>	QTY_AUC Quantity (number such as "1.598" or "4") <b>Required field</b>	AUC_PRICE Price (dollar amount such as "2.49") <b>Required field</b>	WEIGHTING Not used at this time. Keep blank.	COMMENTS_2000 Comments (up to 2000 characters). Optional.	DUE_DATE Due Date (such as "12/1/2019") <b>Required field</b>	SHIPTO_ID Ship To Code (such as "R291000221") <b>Required field</b>	FREIGHT_TERMS Not used at this time. Keep blank.	SHIP_TYPE_ID Not used at this time. Keep blank.	SHIP_FROM_LOC Not used at this time. Keep blank.	

This guide discusses how to create and upload the delimited file in detail and provides high-level information related to creating an event. If you have questions about the other sections of creating an event, review SWIFT Reference Guides.

#### Steps to complete

- Step 1: Access the Event Summary page
- Step 2: Enter information on the header of the Event Summary page
- Step 3: Upload the delimited file to add the lines
- Step 4: Complete the remaining sections on the event

## Steps to create an event by uploading a delimited file

### 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 Format:* Buy
  - *Event Type:* RFX

The screenshot shows the 'Create Events' interface. At the top, there are three buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below these are input fields for 'Business Unit' (containing 'R2901') and 'Origin' (containing 'A12'). There is also an 'Event ID' field with 'NEXT' and a search icon. Further down, there are dropdown menus for 'Event Round' (1), 'Event Version' (1), 'Event Format' (Buy), 'Event Type' (RFX), and 'Proxy Bidding (Auctions Only)' (Disabled). At the bottom left, there is a green 'Add' button.

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

SWIFT displays the **Event Summary** page. Enter the following information on the header.

- *Procurement Type* is a required field.
- Enter or allow the default for the *Event Name*, *Description*, *Preview Date*, *Start Date* and *End Date*.

**Event Summary**

Business Unit R2901      Event ID 2000009456      Round 1      Version 1      Event Format Buy

Origin A12      Commissioners Office

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Event Type RFX      [Change to Auction](#)

Event Status Open

\*Procurement Type ALP RFB

\*Event Name DNR RFB Supplies

Description Plants for state parks

Time Zone CDT

Preview Date 04/06/2019      Time 10:17AM

Start Date 04/08/2019      Time 10:17AM

End Date 04/13/2019      Time 10:17AM

Copy Delimited File      **Go**

From

### Step 3: Upload the delimited file to add the lines

- Fill in the fields on the delimited file template with the line information you wish to copy into the new event. Required fields in the template are highlighted in yellow below. The other fields are optional. You can find this template with SWIFT Reference Guides.

INV_ITEM_ID	DESCR254_MIXED	CATEGORY_CD	UNIT_OF_MEASURE	QTY_AUC	AUC_PRICE	WEIGHTING	COMMENTS_2000	DUE_DATE	SHIPTO_ID	FREIGHT_TERMS	SHIP_TYPE_ID	SHIP_FROM_LOC
Used only for inventory items	Description of Item (up to 254 characters)	Category Code (8 characters such as "10151700")	Unit of Measure (up to 3 characters)	Quantity (number such as "1.598" or "4")	Price (dollar amount such as "2.49")	Not used at this time. Keep blank.	Comments (up to 2000 characters). Optional.	Due Date (such as "12/1/2019")	Ship To Code (such as "R291000221")	Not used at this time. Keep blank.	Not used at this time. Keep blank.	Not used at this time. Keep blank.

- IMPORTANT!** Save the file as a file type of .txt (Tab delimited) and make it available on your desktop. The file type must be .txt in order to load into the event.
- On the *Copy* dropdown menu on the **Event Summary** page, select "Delimited File." Then, press the **Go** button.
- SWIFT displays the **Enter Copy Criteria** page.
  - On the **Select Criteria** section, choose a *Copy Method*.
    - "Append": Add the line information from the template to existing lines of the event.
    - "Override": Replace any existing lines with information from the template.
  - Press the **Select File** button.

**Enter Copy Criteria**

**Copy Template**

Copy From Delimited File

**Select Criteria**

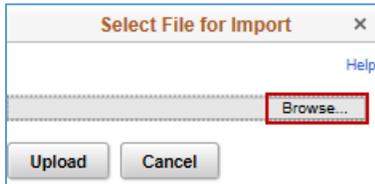
\*Copy Method Append

**Copy Criteria**

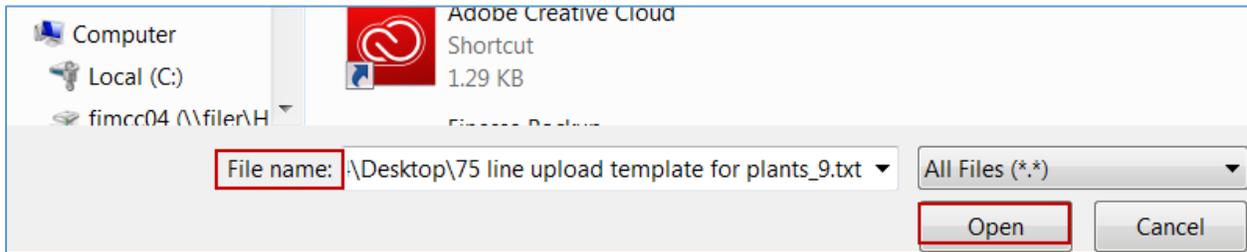
**Select File**

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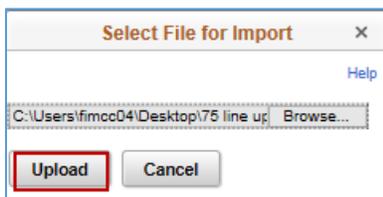
5. SWIFT opens up the **Select File for Import** window. Press the **Browse** button.



6. SWIFT opens up your desktop. Choose the completed, delimited file to upload on the *File Name* section. Press **Open**.



7. SWIFT returns you to the **Select File for Import** window. You can see your delimited file on it. Press the **Upload** button.



8. SWIFT returns you to the **Enter Copy Criteria** page. Review these fields.

- *File Type*: "Items."
- *File Includes Header Row*: Check the box if your file has a header row.
- *Error Options*: "Ignore Errors."
- *Display Import Error Messages*: Check the box.
- *Delimiter Type*: "Tab."
- *Consolidate Identical Items*: Leave the box unchecked.
- *Category Code*: Leave it blank unless you want to change what is in the delimited file.
- *Quantity*: Leave it blank unless you want to change what is in the delimited file.
- *UOM*: Leave it blank unless you want to change what is in the delimited file.

**Enter Copy Criteria**

**Copy Template**  
Copy From: Delimited File

**Select Criteria**  
Copy Method: Append

**Copy Criteria**  
Select File: 75\_line\_upload\_template\_for\_plants\_9.txt  
File Type: Items  
Delimitter Type: Tab  
 File Includes Header Row  
 Consolidate Identical Items  
Error Options: Ignore Errors  
 Display Import Error Messages

**Default Criteria**  
Category: 10161800  
Quantity: 1.0000  
UOM: EA

Search

- Press the **Search** button.
- 9. SWIFT displays the **Event Lines to Copy** page. Select the lines you wish to copy into the new event.
- You can check the **Select All** box and SWIFT will copy all of the lines. Note how many lines that SWIFT will copy in.
- You can also check the **Sel** box next to the lines you wish to copy into the event.
- Press the **OK** button at the bottom of the page.

**Event Lines to Copy**

Select All  Deselect All

Select Lines 1-75 of 75

Sel	Item	Description	Category	Quantity	UOM	Price	Weighting
<input type="checkbox"/>		Schizachyrium scoparium	10151700	64.0000	LB	0.75000	
<input type="checkbox"/>		Bouteloua gracilis	10151700	4.0000	LB	0.75000	

10. SWIFT displays the **Line Items** page of the new event. It includes the line information that was in the upload file.
  - On the **Basic Definition** tab, update the *Description*, *Category*, *UOM*, *Qty* and *Start Price* for each line if needed. You can add or delete lines.
  - On the **Advanced Definition** tab, update any bid factors or add any comments needed for each line.
  - Press the **Save Event Changes** button. SWIFT will provide an *Event ID* for the event and save the information entered.
  - Select the **Return to Event Overview** link. SWIFT returns you to the **Event Summary** page.

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Schizachyrium scoparium	10151700	LB	94.00000	0.75000	\$70.50	0.00000
2		Bouteloua gracilis	10151700	LB	4.00000	0.75000	\$3.00	0.00000
3		Bouteloua curtipendula	10151700	LB	9.00000	0.75000	\$6.75	0.00000

Event Total: 80.2500 USD  
Line Weighting Total: 0 % Remaining Weight: 100%

Group Selected Lines: [Dropdown] [OK]

[Return to Event Overview] [Go To: [Dropdown]] [Go]

[Save Event Changes]

## Step 4: Complete the remaining sections on the event

Press the **Save Event Changes** button after updating each section.

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 updated this page. Add any comments or attachments as needed.
2. Complete 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.
  - You can invite multiple contacts within a supplier record to ensure that the correct representative receives an invitation to bid on an event.
3. As an option, you can invite other SWIFT users to **collaborate** on an event while you are creating the event.
4. Post the completed event.

SWIFT posts the event on the Supplier Portal for bidders to review. You can find it on the **Event Workbench** to process.

Event ID	Name	Format	Type	Unit	Origin	Status					
2000008885	DNR RFB Supplies	Buy	RFX	R2901	A12	11/29/2018 02:08 PM					

5. Analyze and award the event.

If you are awarding an event to a purchase order, keep the purchase order lines as a maximum of 30 lines for a single supplier. You may need to create multiple purchase orders for the supplier.

**You have now successfully created an event by uploading a delimited file.**