

QUICK REFERENCE GUIDE

February 20, 2024

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). Required field	CATEGORY_CD Category Code (8 characters such as "10151700") Required field	UNIT_OF_MEASURE Unit of Measure (up to 2 characters such as "EA") Required field	QTY_AUC Quantity (number such as "1.598" or "4") Required field	AUC_PRICE Price (dollar amount such as "2.49") Required field	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") Required field	SHIPTO_ID Ship To Code (such as "R291000221") Required field	FREIGHT_T ERMS 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 quick reference guide provides the basic 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
Navigation Collection	Procurement, Strategic Sourcing, Create Event. The Add a New Value page defaults.

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

Create Events
Add a New Value

*Business Unit

*Origin

*Event ID

Event Round

Event Version

*Event Format

*Event Type

Proxy Bidding (Auctions Only)

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 information in the Event Name, Description, Preview Date, Start Date and End Date.

[Create an Event](#)

Event Summary

Business Unit Event ID Round Version Event Format

Origin Accounting Services

Event Type [Change to Auction](#)

Event Status Time Zone

*Procurement Type

*Event Name

Description

Preview Date Time

Start Date Time

End Date Time

Copy From

Step 3: Upload the delimited file to add the lines

1. 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 the Sample Delimited File for Copying Lines in the [Strategic Sourcing](#) Quick Reference Guides webpage.

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). Required field	CATEGORY_CD Category Code (8 characters such as "10151700") Required field	UNIT_OF_MEASURE Unit of Measure (up to 2 characters such as "EA") Required field	QTY_AUC Quantity (number such as "1.598" or "4") Required field	AUC_PRICE Price (dollar amount such as "2.49") Required field	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") Required field	SHIPTO_ID Ship To Code (such as "R291000221") Required field	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.	

2. **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.
3. In the header, open the Copy dropdown menu and select "Delimited File." Then, press the **Go** button.
4. SWIFT displays the Enter Copy Criteria page in a separate window.
 - a. 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.
 - b. Press the **Select File** button.

Create an Event

Enter Copy Criteria

Copy Template

Copy From: Delimited File

Select Criteria

*Copy Method: Append

Copy Criteria

Select File

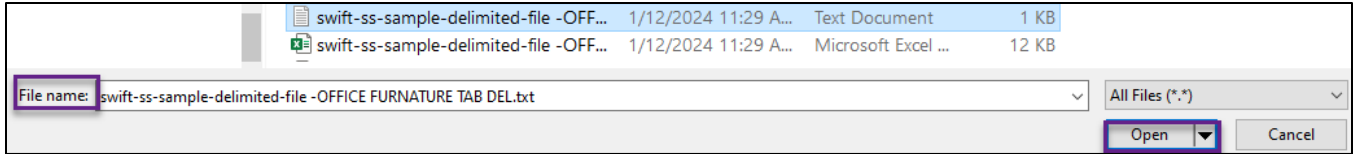
5. SWIFT opens up the Select File for Import window. Press the **Choose File** button.

Select File for Import

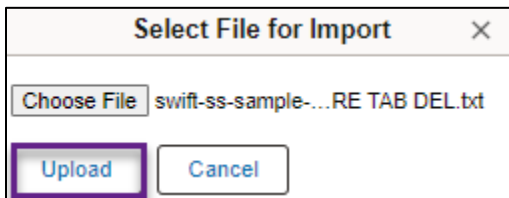
Choose File No file chosen

Upload Cancel

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



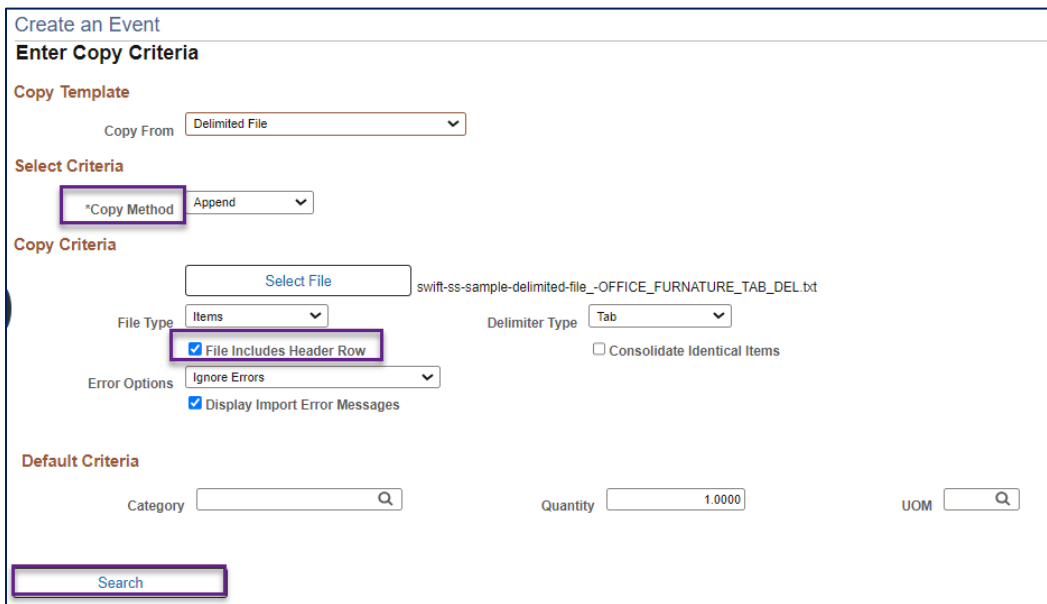
7. SWIFT returns you to the Select File for Import window. You can see your delimited file on it. Press the **Upload** button.



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.

Press the **Search** button.



9. SWIFT displays the Event Lines to Copy page.
 a. Select the lines you wish to copy into the new event.

- b. You can check the **Select All** box and SWIFT will copy all of the lines. Note how many lines that SWIFT will copy in.
- c. You can also check the **Sel** box next to the lines you wish to copy into the event.
- d. Press the **OK** button at the bottom of the page.

Event Lines to Copy

Select All **Deselect All**

Select Lines

 < > 1-4 of 4 >

Item Details Shipping Details Specifications Comments

Sel	Item	Description	Category	Quantity	UOM	Price	Weighting
<input checked="" type="checkbox"/>		Chairs	56101500	50.0000	EA	500.00000	
<input checked="" type="checkbox"/>		Tables	56101500	5.0000	EA	100.00000	
<input checked="" type="checkbox"/>		Easels	56101500	5.0000	EA	50.00000	
<input checked="" type="checkbox"/>		Podium	56101500	5.0000	EA	200.00000	

Create Line Group

10. SWIFT displays the Line Items page of the new event. It includes the line information that was in the upload file.

- a. 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.
- b. On the **Advanced Definition** tab, update any bid factors or add any comments needed for each line.
- c. At the bottom of the page, press the **Save Event Changes** button. SWIFT will provide an Event ID for the event and save the information entered.
- d. Select the **Return to Event Overview** link. SWIFT returns you to the Event Summary page.

Line Items

Business Unit: G1001 Event ID: 2000015236 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View:

Line Items < > 1-4 of 4 > View All

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting		
<input type="checkbox"/>	<input type="text"/>	Chairs	56101500	EA	50.0000	500.00000	\$25,000.00	0.00000	+	-
<input type="checkbox"/>	<input type="text"/>	Tables	56101500	EA	5.0000	100.00000	\$500.00	0.00000	+	-
<input type="checkbox"/>	<input type="text"/>	Easels	56101500	EA	5.0000	50.00000	\$250.00	0.00000	+	-
<input type="checkbox"/>	<input type="text"/>	Podium	56101500	EA	5.0000	200.00000	\$1,000.00	0.00000	+	-

Event Total: 26750.0000 USD Line Weighting Total: 0% Remaining Weight: 100%

Group Selected Lines:

 GoTo:

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.
 - a. Make sure that the Public Event box is checked if you want this event to appear on the Supplier Portal for public bids.
 - b. You can invite multiple contacts within a supplier record to ensure that the correct representative receives an invitation to bid on an event.
3. **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.

Search Results							1-1 of 1			
Event ID	Name	Format	Type	Unit	Origin	Status				
2000015236	test	Buy	RFx	G1001	509	Pending Post Approval				

4. 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.