

## QUICK REFERENCE GUIDE

February 20, 2024

### Create a New Version of an Event

Sometimes you may need to change an event after you posted it in SWIFT. How you update it depends upon how far SWIFT processed it. Follow your agency's guidelines to determine whether to update the event by editing the current version or if a new version is needed.

**IMPORTANT.** Inform the responders and potential responders of the new version of an event. Follow your agency guidelines on how to handle a new version and the communication of it.

This Quick Reference Guide provides the steps to create a new version of an event. For more details, you can review the [Create an Event](#) Quick Reference Guide.

### Step 1: Locate an event using the Event Workbench

1. Navigate to the **Event Workbench** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left menu, Sourcing, Event Workbench page.

2. On the Event Workbench page, enter search criteria and then select the **Search** button.

**Event Workbench**

Search Criteria

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With  Origin

From Start Date  To Start Date

From End Date  To End Date

Category

Item ID

Description

Plan

Sort With

Sort Order

☒ Only show Events I created

☒ Only show Active Events

☐ Use my search defaults

[Default Search Preferences](#)

3. SWIFT displays your search results.
  - a. On the event you wish to create a new version, you can press the **View Line Details** icon to see all of the lines.
  - b. Press the **Create New Version** icon.

2000015240

Sit/Stand Workstat...

Buy RFx

G1001

509

Event Completed

Create New Version icon

View Line Details icon

1-2 of 2

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View All

Line	Category	Item ID	Item Description	Qty	Extended Price
1	56111500		Ergotron Workfit S-Dual Sit & Stand Workstation OR Approved Equal	10	4850.00
2	72101501		Workstation Installation	10	600.00

## Step 2: Create a new version of an event

1. When you select the Create New Version icon, SWIFT displays a message that says this operation will create a new version of the event. Press **Yes**.

Create New Version? (18058,8129)

This operation will create a new version of the event. The current active version will not be inactivated until the new version has been posted. Select 'Yes' if you wish to create a new version for this event. Otherwise, select 'No'.

Yes

No

2. SWIFT displays the Modify an Event page. Update the event as needed.
  - a. Update the **Description** field to include information about what was changed. The more detailed the description, the easier it is for bidders to locate the changes and be responsive.

**As a best practice**, update the Description field with the words: “Amendment #” at the beginning of the description. This ensures that bidders see what you changed and where you made the change.

\*Procurement Type ALP RFB

\*Event Name Sit/Stand Workstations

Description AMENDMENT #1 Ergotron Worklist S- Dual Sit/Stand Workstations or approved equal

- b. Save your changes. Anytime you make a change, press the **Save Event** button at the bottom of the page. SWIFT will create and update the new version.

Modify an Event

**Event Summary**

Business Unit G1001 Event ID 2000015240 Round 1 **Version 2** Event Format Buy

- c. Renotify previously invited bidders.
  - i. On the Select Bidders to Invite section, press the **Bidder Invitations** link.

## Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

- ii. SWIFT displays the Invite Bidders page. Verify if you want SWIFT to notify previously invited bidders by checking the **Renotify** box for each bidder.

Invite Bidders

Business Unit

G1001

Event ID

2000015240

Round

1

Version

2

Event Format

Buy

Event Type

RFX

☒ Public Event

Bidder Invitation List

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	*Dispatch Method	Renotify
<input type="checkbox"/>	0000195747	Supplier		001	ACRE	Email	<input checked="" type="checkbox"/>

3. Press the **Save Event Changes** button and then select the **Return to the Event Overview** link after you update each step on the event.
4. Post the new version of the event. At the bottom of the page, press the **Post** button. SWIFT will route the new version through any required approvals