

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### 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.

It is important to 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.

Steps to complete:

- Step 1: Access the event in the Event Workbench
- Step 2: Create a new version of the event

### Steps to create a new version of an event

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

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

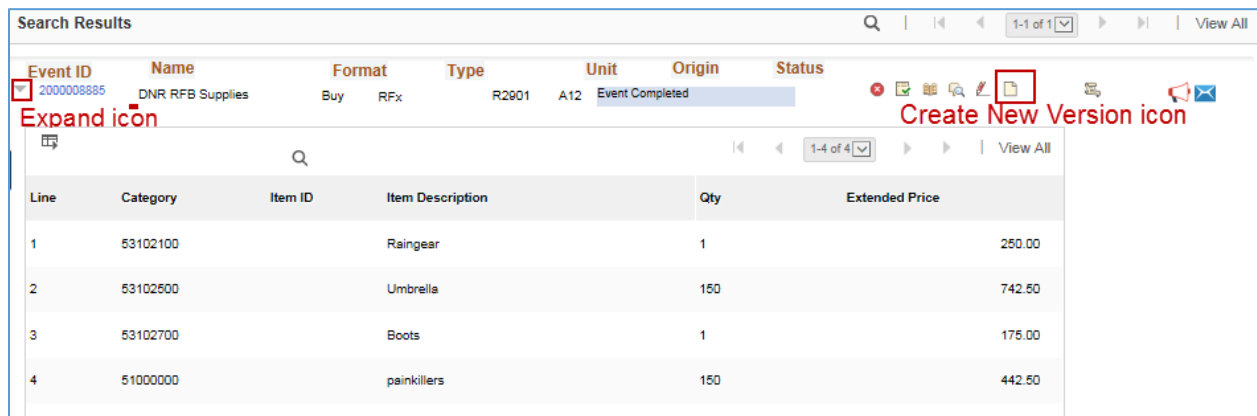
Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Event Workbench page.

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

The screenshot shows the 'Event Workbench' search interface. It includes a 'Search Criteria' section with the following fields and options:

- Business Unit (text input with search icon)
- Event ID (text input)
- Created By (text input with search icon)
- Event Format (dropdown menu)
- Event Type (dropdown menu)
- Event Status (dropdown menu)
- Associated With (text input with search icon)
- Origin (text input with search icon)
- Plan (text input)
- From Start Date (calendar icon)
- From End Date (calendar icon)
- Category (text input)
- Item ID (text input)
- Description (text input)
- Plan Name (text input with search icon)
- To Start Date (calendar icon)
- To End Date (calendar icon)
- Sort With (dropdown menu)
- Sort Order (dropdown menu)
- Only show Events I created
- Only show Active Events
- Use my search defaults
- Search** button (highlighted with a red box)
- Reset button
- Default Search Preferences link

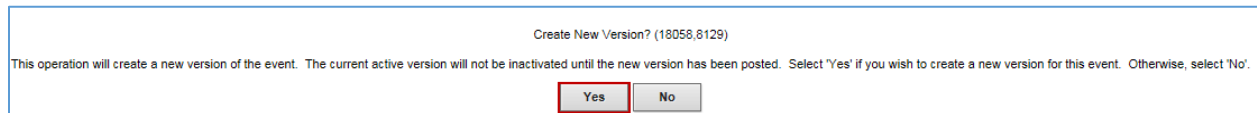
- SWIFT displays your search results. On the event you wish to create a new version, you can press the **Expand** icon to see all of the lines. Press the **Create New Version** icon.



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

1. Accept the message.

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**.



2. Modify the event.

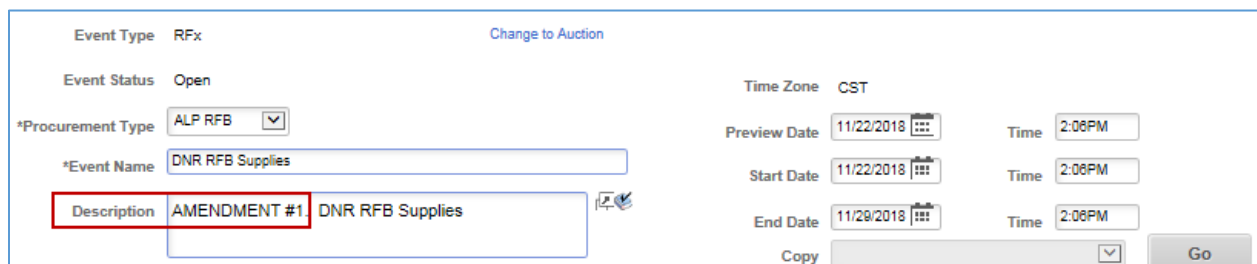
SWIFT displays the **Modify an Event** page. Update the event as needed.

**Here are some recommendations for creating a new version of an event.**

- a. Update the *Description* field.

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.

**NOTE:** If you change the event after it has been posted, update the *Description* field with the words: “*Amendment #*”. Show each amendment at the beginning of the description. This practice ensures that bidders see what you changed and where you made the change.



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.

**Event Summary**

Business Unit R2901      Event ID 200008885      Round 1      Version 2      Event Format Buy

Origin A12      Commissioners Office

c. Renotify previously invited bidders.

- 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

- 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 R2901      Event ID 200008885      Round 1      Version 2      Event Format Buy      Event Type RFx

Public Event

**Bidder Invitation List** ?

1-4 of 4 View All

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method	Renotify		
<input type="checkbox"/>	0000192548	Supplier	001	BITUMINOUS ROADWAYS INC	Email <input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0000389412	Supplier	001	TEST	Email <input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0001011424	Bidder	1	REDID COOK	Email <input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	PUBLIC_AUC	Public	1	This is a Public Event	Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Press the **Save Event Changes** button and then select the **Return to the Event Overview** link after you update each step on the event.
3. Post the new version of the event.
- Press the **Post** button.

SWIFT will route the new version through any required approvals

**You have successfully created a new version of an event.**