

QUICK REFERENCE GUIDE

February 20, 2024

Create and Use an Event Template

Event creators can set up an event template for a standard event in SWIFT's Strategic Sourcing module. You can use an event template to start a new event. SWIFT will copy over the event settings, comments and attachments, line items, bid factors, invited bidders, event name and event description. The ability to create event templates is based on an individual's security profile.

This guide lists the steps to create an event template as well as how to locate and use saved templates.

1. Update an existing event and save it as a template.
2. Create an event template using the Maintain Event Templates page.
3. Review an existing template.
4. Use an existing template to create an event.

For details on creating events, review the [Create an Event](#) quick reference guide.

Steps to update an existing event and save it as a template

Step 1: Create an event

1. Follow the necessary steps to create an event in SWIFT.
2. On the bottom of the Event Summary page, select the **Save Event** button.

IMPORTANT: Do not post the event prior to saving it as a template.

Step 2: Create the Event Template for an event

1. At the bottom of the page, select the **Save as Template** button.

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF

2. SWIFT displays the Sourcing Template Details window.
 - a. Check the **Save as Template** checkbox. Select **OK**.

Event Template Info

Business Unit G1001
Event ID 2000015242
Round 1
Version 1
Event Format Buy
Event Type RFx

Template Info

Save as Template?: ☐

OK

Cancel

Refresh

- b. SWIFT opens up the section to describe the template.
- c. Enter the **Template Type**.
 - i. **Business Unit:** These templates are available to all users who have access to create events in that business unit.
 - ii. **Personal:** These templates are available only to the user who created the template.
- d. Give it a **Template ID**
- e. Add a **Description**.
- f. Select the **OK** button.

Event Template Info

Business Unit G1001
Event ID 2000015242
Round 1
Version 1
Event Format Buy
Event Type RFx

Template Info

Save as Template?: ☒

Template Type

Personal

Template ID

Test2

Description

test2

OK

Cancel

Refresh

3. SWIFT displays a message that the template will not be available for use until the event is posted. Select the **OK** button.

Template will not be available for use until the event is posted. (18058,8338)

Please post the event in order to use the new Template.

OK

4. Continue processing the event through approvals and posting.

REMINDER: this process creates the event in addition to the new template.

Steps to create an event template using the Maintain Event Templates page

Step 1: Access the Maintain Event Templates page

1. Navigate to the **Maintain Event Templates** page.

| Navigation Option | Navigation Path |
|------------------------------|------------------------------------------------------------------------------------------|
| Navigation Collection | Procurement, Strategic Sourcing, Create Event. Left menu, Maintain Event Templates page. |

2. SWIFT displays the Maintain Templates page. It defaults to the **Add a New Value** page.
 - a. Enter your **Business Unit** and **Origin**.
 - b. Choose an **Event Format**.
 - i. Use “Buy” for RFP or RFB events.
 - ii. Use “RFI” for Request for Information.
 - c. Select a **Template Type** from the drop-down menu.
 - i. Use “Business Unit” or “Personal.”
 - ii. Do not use “Department.”
 - d. Create and enter a **Template ID**. Create an ID that best describes the event template.
 - e. Press the **Add** button.

The screenshot shows the 'Maintain Templates' page in the SWIFT system. The left-hand navigation pane has 'Maintain Event Templates' selected. The main area is titled 'Add a New Value' and includes a search bar 'Find an Existing Value'. Below this, there are several form fields for creating a new template:

- *Business Unit: G1001
- *Origin: G
- *Event ID: NEXT
- Event Round: 1
- Event Version: 1
- *Event Format: Buy
- *Event Type: RFI
- Template Type: Personal
- Template ID: Test QRG

 An 'Add' button is located at the bottom of the form.

Step 2: Enter the required information to create an event

1. SWIFT displays the Event Summary page. Enter information in the appropriate section that you wish to default on any event copied from the template.

2. Press the **Save Event** button at the bottom of the page.

Step 3: Update the Template Info page

1. At the bottom of the Event Summary page, press the **Template Info** button.

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

2. On the Event Template Info page, add a brief **description**, confirm the Status is set to “Active” and then select **OK**.

Event Template Info

Business Unit G1001 Template Type Personal Template ID TEST QRG

Description

Template Info

Status

Steps to review an existing template

Step 1: Access the Maintain Event Templates page

1. Navigate to the **Maintain Event Templates** page.

| Navigation Option | Navigation Path |
|------------------------------|------------------------------------------------------------------------------------------|
| Navigation Collection | Procurement, Strategic Sourcing, Create Event. Left menu, Maintain Event Templates page. |

2. SWIFT displays the Maintain Templates page. Select the **Find an Existing Value** button.

Maintain Templates

Add a New Value

- On the Find an Existing Value page, enter information on the **Search Criteria** section to locate existing templates. Select **Search**.

Step 2: Review the template

- SWIFT displays search results. Press the **Template ID** link to view the template.

| Search Results | | | | | | | |
|--------------------------------------------------------|-------------|---------------|----------|-----------------|--------------|----------------------|---|
| 1 rows - Business Unit "G1001" Event Round "1" +2 more | | | | | | | |
| <div> <div>1-1 of 1</div> <div>View All</div> </div> | | | | | | | |
| Business Unit | Template ID | Template Type | User ID | Template Status | Event Format | Template Description | |
| G1001 | TEST QRG | Personal | 01141983 | Active | Buy | Office Furniture | > |

- SWIFT displays the template for you to view.

Steps to use an Event Template to create a new event

Step 1: Access and populate the header on the Event Summary page

- Navigate to the Add a New Value page.

| Navigation Options | Navigation Path |
|-----------------------|---------------------------------------------------------------------------------------------------|
| Navigation Collection | Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value page defaults. |

| Navigation Options | Navigation Path |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| WorkCenter | Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value page defaults. |

2. On the **Add a New Value** page, enter the following information.
 - a. Business Unit
 - b. Origin
 - c. Format:
 - i. Use “Buy” for Request for Bid (RFB) or Request for Proposal (RFP).
 - ii. Use “RFI” if Request for Information
 - d. Event Type: Use “RFx”
3. Press the **Add** button.

Step 2: Enter information on the Create an Event page

1. On the Create an Event page, enter the following information on the header of the Event Summary page.
 - a. You can enter **Event Name, Description, Preview Date, Start Date** and **End Date** or allow these to default in.
 - b. You will need to select the **Procurement Type** if it did not copy from the template.
 - c. You can update these fields after you create the new event from the template.
2. In the **Copy From** menu, select “Sourcing Template” from the dropdown list and press **Go**.

Event Summary

Business Unit G1001
 Event ID NEXT
 Round 1
 Version 1
 Event Format Buy
 Origin 509 Accounting Services

Event Type RFx [Change to Auction](#)

Event Status Open
 Time Zone CST

*Procurement Type ALP RFB

*Event Name Furniture

Description Furniture

Preview Date 01/18/2024

Start Date 01/18/2024

End Date 01/25/2024

Time 10:44AM

Time 10:44AM

Time 10:44AM

Copy From Sourcing Template
 [Go](#)

Step 3: Enter information on the Enter Copy Criteria page

1. SWIFT displays the Enter Copy Criteria page. Enter the following information in the **Select Criteria** section.
 - a. **Business Unit:** Enter or confirm the business unit of the event from which the lines will be copied.

- b. **Copy Method:** Choose one of the following options.
 - i. "Append": Add copied data to existing lines of the event.
 - ii. Override": Replace any existing data with copied information.
- c. **Event Type:** Leave as "RFx."
- d. **Template ID:** Enter the Template ID or select the **Search** icon on the Template ID field and locate the template you wish to use.
- e. Press the **Search** button.

Enter Copy Criteria

Copy Template

Copy From:

Select Criteria

Business Unit:

*Copy Method:

Event Type:

Copy Criteria

Template ID:

Search icon

Step 4: Enter lines on the new event

1. SWIFT opens up the Event Lines to Copy page. Check the **Sel** box to select the lines to copy. You can also press the **Select All** link to select all lines. You can press the **Deselect All** link to unselect all lines.
2. Press the **OK** button.

Event Lines to Copy

☒ **Select All** ☐ **Deselect All**

Select Lines

| Sel | Item | Group ID | Description | Quantity | UOM | Price | Currency | Business Unit | Event ID | Due Date | Ship To |
|-------------------------------------|------|----------|-------------|----------|-----|-----------|----------|---------------|------------|------------|------------|
| <input checked="" type="checkbox"/> | | | Chairs | 50.0000 | EA | 500.00000 | USD | G1001 | 2000015241 | 03/31/2024 | G104THFL00 |
| <input checked="" type="checkbox"/> | | | Tables | 5.0000 | EA | 100.00000 | USD | G1001 | 2000015241 | 03/31/2024 | G104THFL00 |
| <input checked="" type="checkbox"/> | | | Easels | 5.0000 | EA | 50.00000 | USD | G1001 | 2000015241 | 03/31/2024 | G104THFL00 |
| <input checked="" type="checkbox"/> | | | Podium | 5.0000 | EA | 200.00000 | USD | G1001 | 2000015241 | 03/31/2024 | G104THFL00 |

☐ **Create Line Group**

3. SWIFT displays the Line Items page.
 - a. Confirm the details on both the **Basic Definition** and **Advanced Definition** tabs.
 - b. Select **Save Event Changes**.
 - c. Press the **Return to Event Overview** link.

Line Items

Basic Definition

Advanced Definition

| | Line | Item ID | Description | | Category | *UOM | *Qty | Start Price | Ext. Amount | Weighting | | |
|--------------------------|------|----------------------|-----------------------------|--|-------------------------------|-------------------------|------------------------------|-------------------------------|-------------|------------------------------|------------------------|------------------------|
| <input type="checkbox"/> | 1 | <input type="text"/> | <input type="text"/> Chairs | | <input type="text"/> 56101500 | <input type="text"/> EA | <input type="text"/> 50.0000 | <input type="text"/> 500.0000 | \$25,000.00 | <input type="text"/> 0.00000 | <input type="text"/> + | <input type="text"/> - |
| <input type="checkbox"/> | 2 | <input type="text"/> | <input type="text"/> Tables | | <input type="text"/> 56101500 | <input type="text"/> EA | <input type="text"/> 5.0000 | <input type="text"/> 100.0000 | \$500.00 | <input type="text"/> 0.00000 | <input type="text"/> + | <input type="text"/> - |
| <input type="checkbox"/> | 3 | <input type="text"/> | <input type="text"/> Easels | | <input type="text"/> 56101500 | <input type="text"/> EA | <input type="text"/> 5.0000 | <input type="text"/> 50.0000 | \$250.00 | <input type="text"/> 0.00000 | <input type="text"/> + | <input type="text"/> - |
| <input type="checkbox"/> | 4 | <input type="text"/> | <input type="text"/> Podium | | <input type="text"/> 56101500 | <input type="text"/> EA | <input type="text"/> 5.0000 | <input type="text"/> 200.0000 | \$1,000.00 | <input type="text"/> 0.00000 | <input type="text"/> + | <input type="text"/> - |

Event Total: 26750.0000 USD

Line Weighting Total: 0 % Remaining Weight: 100%

Group Selected Lines

OK

< Return to Event Overview

GoTo

Go

Save Event Changes

4. SWIFT returns you to the Event Summary page.
 - a. Complete the remaining sections on the event. Data that existed on the template, such as event settings, bid factors, comments and attachments, and invited bidders, will copy from the template.
 - b. Confirm that the values entered are appropriate for the new event.
 - c. Press the **Save Event Changes** button after updating each section.
 - d. **Post** the completed event.