

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.



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





- 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.



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



4. Continue processing the event through approvals and posting.

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



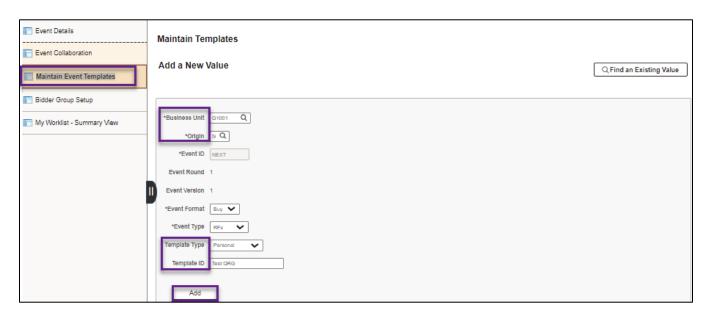
Steps to create an event template using the Maintain Event Templates page

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.



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.



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



Steps to review an existing template

Step 1: Access the Maintain Event Templates page

1. Navigate to the Maintain Event Templates page.

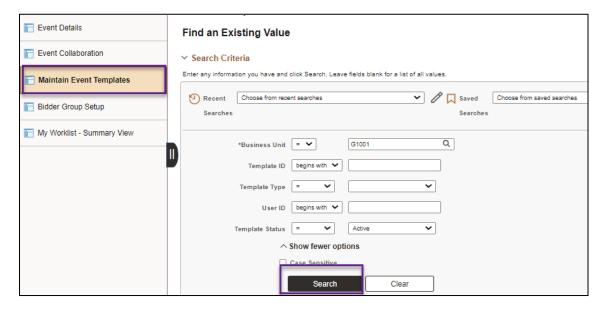
Navigation Option	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event. Left menu, Maintain Event Templates page.

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



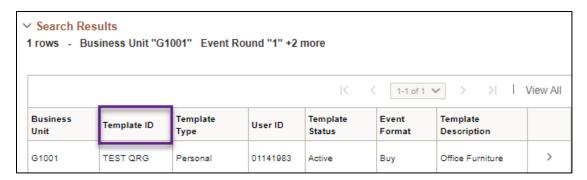


3. On the Find an Existing Value page, enter information on the **Search Criteria** section to locate existing templates. Select **Search**.



Step 2: Review the template

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



2. 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

1. 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.

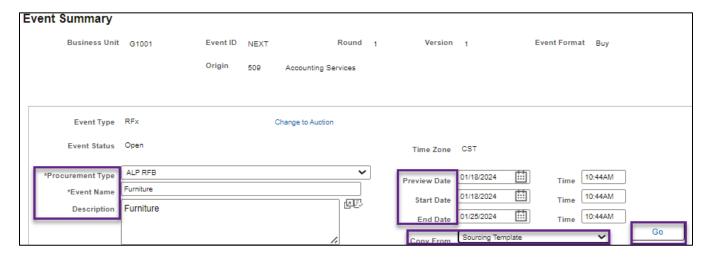


Navigation Options	Navigation Path
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value page defaults.

- 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.**

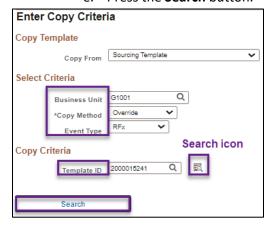


Step 3: Enter information on the Enter Copy Criteria page

- 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.



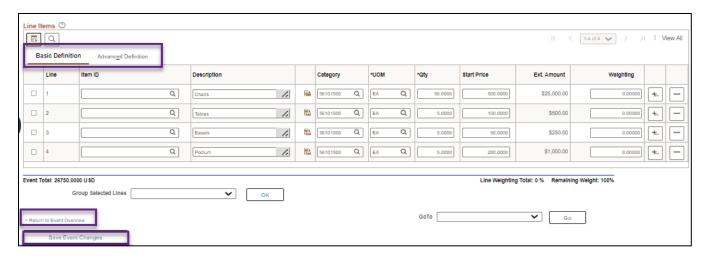
Step 4: Enter lines on the new event

- 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.



- 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.





- 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.