

QUICK REFERENCE GUIDE

Updated November 1, 2019

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.

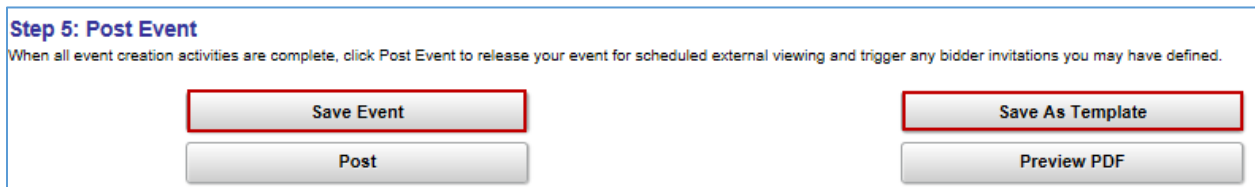
This guide lists the steps to create an event template as well as how to locate and use saved templates.

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.

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



Step 2: Create the Event Template for an event

1. Select the **Save as Template** button.

SWIFT displays the **Sourcing Template Details** window.

2. Check the **Save as Template** checkbox. SWIFT opens up the section to describe the template.
3. Enter the *Template Type*. Use "Business Unit" or "Personal". Give it a *Template ID* and a *Description*.
4. Select the **OK** button.

Sourcing Template Details

Modify an Event

Event Template Info

Business Unit R2901 Event ID 2000008848 Round 1 Version 1 Event Format Buy Event Type RFX

Template Info

Save as Template?:

Template Type Business Un Template ID TRAIN1 Description Leadership Devt Training x

OK Cancel Refresh

Description of Template Type

- **Business Unit:** These templates are available to all users who have access to create events in that business unit.
 - **Department:** SWIFT does not use this feature.
 - **Personal:** These templates are available only to the user who created the template.
5. 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

6. Continue processing the event through approvals and posting.

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

You have successfully updated an existing event and saved it as a 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 Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event. Left menu, Maintain Event Templates page.

2. On the **Maintain Event Templates** page, select the **Add a New Value** tab.
 - Enter your *Business Unit* and *Origin*.
 - Choose an *Event Format*: “Buy” for RFP or RFB events. “RFI” for Request for Information”.

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- Select a *Template Type* from the drop-down menu. Use “Business Unit” or “Personal”. Do not use “Department”.
- Create and enter a *Template ID*. Create an ID that best describes the event template.
- Press the **Add** button.

The screenshot shows the 'Maintain Templates' interface. On the left is a sidebar with navigation options: Event Details, Event Collaboration, Maintain Event Templates (highlighted), Bidder Group Setup, and Worklist. The main area is titled 'Maintain Templates' and contains the following fields and buttons:

- Buttons: Find an Existing Value, Keyword Search, Add a New Value
- Business Unit: R2901
- Origin: A44
- Event ID: NEXT
- Event Round: 1
- Event Version: 1
- Event Format: Buy
- Event Type: RFx
- Template Type: Personal (dropdown menu)
- Template ID: A44TRAIN
- Buttons: Add

Step 2: Enter the required information to create an event.

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

Buttons: Save Event, Template Info, Preview PDF

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 R2901 Template Type Personal Template ID A44TRAIN

Description Training for Leadership

Template Info

Status Active

OK Cancel Refresh

SWIFT displays the **Event Summary** page. Save the event.

You have successfully created an event template using the **Maintain Event Templates** page.

Steps to review an existing template

Step 1: Access the Maintain Event Templates page

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

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

2. On the **Find an Existing Value** tab, enter information on the **Search Criteria** section to locate existing templates.

- Select **Search**.

Maintain Templates

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Keyword Search Add a New Value

Search Criteria

Business Unit = R2901

Template ID begins with A44TRAIN

Template Type =

User ID begins with

Template Status =

Case Sensitive

Search Clear Basic Search Save Search Criteria

Step 2: Review the template

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

Search Results						
View All		1-3 of 3				
Business Unit	Template ID	Template Type	User ID	Template Status	Event Format	Template Description
R2901	A44TRAIN	Personal	00744476	Active	Buy	Training for Leadership
R2901	ARGO	Bus Unit	01000086	Active	Buy	Argo
R2901	TEMPLATE	Personal	00744476	Active	Buy	Multi line template

- SWIFT displays the template for you to view.

You have successfully located an event template for review.

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 tab.
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value tab.

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

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.
 - You can enter *Event Name*, *Description*, *Preview Date*, *Start Date* and *End Date* or allow these to default in.
 - You will need to select the *Procurement Type* if it did not copy from the template.
 - You can update these fields after you create the new event from the template.

- On the **Copy From** menu, select “Sourcing Template” from the dropdown list and press **Go**.

SWIFT displays the **Enter Copy Criteria** page.

Step 3: Enter information on the Enter Copy Criteria page

- On the **Enter Copy Criteria** page, enter the following information in the **Select Criteria** section.
 - Business Unit:** Enter or confirm the business unit of the event from which the lines will be copied.
 - Copy Method:** Choose one of the following options.
 - “Append”: Add copied data to existing lines of the event
 - “Override”: Replace any existing data with copied information
 - Event Type:** Leave as “RFX”.
 - Template ID:** Enter the *Template ID* or select the **Search** icon on the *Template ID* field and locate the template you wish to use.
 - Press the **Search** button.

Step 4: Enter lines on the new event

SWIFT opens up the **Event Lines to Copy** page.

1. 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.
 - Press the **OK** button.

2. SWIFT displays the **Line Items** page.

- Confirm the details on both the **Basic Definition** and **Advanced Definition** tabs.

- Press the **Return to Event Overview** link. SWIFT returns you to the **Event Summary** page.
3. 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. Confirm that the values entered are appropriate for the new event.
 - Press the **Save Event Changes** button after updating each section.
 - Post the completed event.

You have now successfully completed an event by copying it from an event template.