

QUICK REFERENCE GUIDE

May 3, 2024

Use the Event Workbench

The Event Workbench in SWIFT’s Strategic Sourcing module functions as a “one-stop shop” and allows agencies to easily monitor and manage events. If you are managing multiple events at the same time, track them from the Event Workbench. You can only view and manage events by Business Unit and Origin that you are authorized to view and manage.

The Department of Administration’s Office of State Procurement recommends that agencies review all of their event activity from the Event Workbench. Because of the complex nature of the SS event process, there are many details related to each event.

There are three components on the Event Workbench.

1. Search Criteria
2. Legend
3. Search Results

This guide provides shows you how to access the Event Workbench. It also provides an overview of the three components in the Event Workbench.

Access the Event Workbench in the Strategic Sourcing module

Navigate to the **Event Workbench** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page defaults.
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left menu, Links, Sourcing, Event Workbench link, Event Workbench page.

Sections on the Event Workbench

1. Search Criteria section

The purpose of the Search Criteria section is to locate a specific event or group of events. When SWIFT displays the Event Workbench, the bottom of the page lists all “Active” events that you have security to view and manage. Active events are not cancelled or awarded.

Search for events

To find an individual event or group of events, enter information in the appropriate search field, then press the **Search** button.

- Commonly used search criteria include Business Unit, Event ID, and Event Status.
- Use the **Sort With** and **Sort Order** to change the order of the returned results.
- To see events that are not “Active,” uncheck the **Only Show Active Events** checkbox.
- You can also select the **Default Search Preferences** link.

The screenshot shows the 'Event Workbench' interface with a 'Search Criteria' section. The search criteria are organized into several columns. The first column contains text input fields with search icons for Business Unit, Event ID, Created By, Associated With, and Origin. The second column contains date pickers for From Start Date, To Start Date, From End Date, and To End Date. The third column contains text input fields for Category, Item ID, and Description. The fourth column contains a text input field for Plan Name. To the right of these fields are sorting options: 'Sort With' (set to End Date) and 'Sort Order' (set to Ascending). Below these are two checked checkboxes: 'Only show Events I created' and 'Only show Active Events'. There is also an unchecked checkbox for 'Use my search defaults'. At the bottom right of the search criteria section are a 'Search' button and a 'Reset' button. A link labeled 'Default Search Preferences' is located below the Search button and is highlighted with a purple box.

Event Status

The Event Status field describes how far an individual event has been processed in SWIFT.

- **Awarded:** The event award has been approved; the event itself is complete.
- **Cancelled:** The event creator canceled the event.
- **Collaborating Bid Analysis:** The State of Minnesota does not use this functionality.
- **Collaborating Event:** The State of Minnesota does not use this functionality.
- **Not Awarded:** The event ended without the event being awarded.
- **Open:** The event is newly created and not yet approved and posted for review by potential responders.
- **Pending Award:** The event has been completed but not yet awarded.
- **Pending Post Approval:** The event is posted for internal approval
- **Pending RFI Review:** The event has ended and is awaiting review
- **Posted:** The event is approved. The Date and Time are viewable. Bidding is ongoing.

Default Search Preference link

1. As an option, you can select the **Default Search Preference** link in the Search Criteria section.

It allows you to set default preferences for searching. When you save the search parameters, SWIFT will apply them to the search results anytime you access the Event Workbench.

2. After you select the link, SWIFT displays the Event Workbench Search Preferences page.
 - a. Enter any preferences.
 - b. Select **Save** to use them in future searches.
 - c. Then, select the **Return to Event Workbench** link.

3. SWIFT returns you to the Event Workbench page.
 - a. After you enter the search criteria, select **Search** to locate events matching search criteria entered.
 - b. Select the **Reset** button to clear search fields.

4. Legend section

If you select the **Expand/Collapse** icon on the Legend section, SWIFT opens it up. The Legend section shows the actions that are available for events. It lists each icon and a description for the icons used in the Search Results section. If available, the buttons appear to the right of each event. Availability depends on the event's status.

Icons and Actions in the Legend section

Icon Name	Icon/Action Description
Pause	Pauses the event so that the event creator can make changes while the event is happening. SWIFT displays this icon only for events with the Status of Posted
Resume	Resumes a paused event so that bidders can continue bidding on the event. SWIFT displays this icon only when an event is paused.
Cancel	Enables users to cancel an event. This option is not available if the event Status is Awarded, Not Awarded or Cancelled
Approval Status	Allows users to view the approval status and history for event. You can also view comments left by approvers. It is available for events once SWIFT routes the event for workflow approval.
Event History	Enables the user to view the event stages, version and round history. This icon is available for all events, regardless of status.
Analyze Bids	Indicates that the Analyze Events page is available for all events with the following Statuses: Event Completed, Pending Award, Pending RFI Review, Awarded, RFI Reviewed, and Not Awarded.
Notice of Intent to Award	Enables the user to send a Notice of Intent to Award notification to bidders that submitted a bid to an event. This optional functionality is intended to inform bidders that the event has ended and a supplier has been selected.
Notice of Award	Allows the user to send a Notice of Award notification for an event.
Edit Event	Allows users to edit the current version of the selected event on the Event Details page.
New Version	Allows users to create a new version of the selected event on the Event Details page. This icon is not available for awarded events or events that a collaborator has checked out.
View Collaboration	The State of Minnesota does not use this function.
Collaboration Available	The State of Minnesota does not use this function.
Collaboration Checked Out	The State of Minnesota does not use this function.
Bid History	Allows users to view the invitation and bid history for the selected event.
Notify Me on Check-In	The State of Minnesota does not use this function.
View Award Details	Takes users to the Award Details page of an event. Only available when the event is in a status of Pending Award or Awarded.

5. Search Results section

After searching for an event, view the **Search Results** section to see the specific event. You can also see the status of the event and the available options for it.

- The far-right area of the Search Results line displays the actions currently available for the event. In most cases, you will use the actions on the right side of the line to edit it or process it.
- If you select the **Event ID** link, SWIFT displays the Event Summary page for that event. It allows you to see the details of the event.
- For posted events that have not yet reached the End Date, SWIFT displays the End Date and End Time in the Status column. When only 24 hours remain before the End Date, the Status will show a countdown to the End Date and End Time.

Search Results							1-7 of 7	View A
Event ID	Name	Format	Type	Unit	Origin	Status		
2000013913	Diversity, Equity ...	Buy	RFx	G1001	511	Pending Award		
2000013956	Plan Administratio...	Buy	RFx	G1001	511	Pending Award		
2000014203	Dental Plan Admini...	Buy	RFx	G1001	511	Pending Award		
2000015238	test bid factors	Buy	RFx	G1001	511	Pending Post Approval		