

QUICK REFERENCE GUIDE

Updated November 1, 2019

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.
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 (those neither cancelled nor awarded) that you have security to view and manage.

1. 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.

Field Name	Field Description
Event Status	<p>The field describes how far an individual event has been processed in SWIFT.</p> <ul style="list-style-type: none"> Awarded: The event award has been approved; the event itself is complete. Cancelled: The event creator canceled the event. Collaborating Bid Analysis: The event has been routed for bid analysis collaboration. Collaborating Event: The event has been routed for internal collaboration. 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 Preferences** link: Select this link to set default preferences for searching.

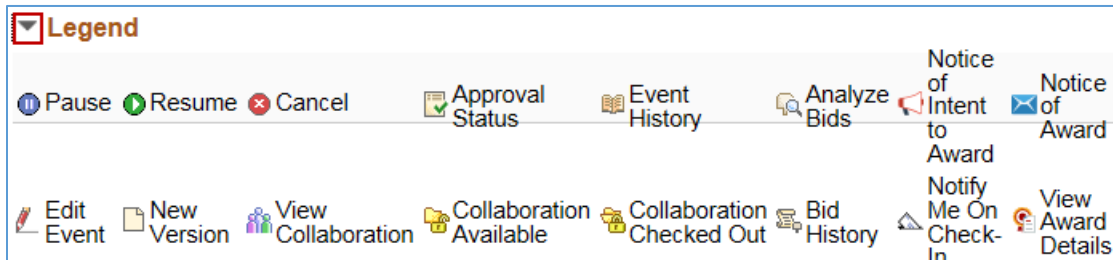
SWIFT displays the **Event Workbench Search Preferences** page. It allows you to identify the search parameters and have those parameters applied to the search results anytime you access the Event Workbench.

- Enter any preferences and select **Save** to use them in future searches.
- Then, select the **Return to Event Workbench** link.

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

2. 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. These actions are described below.



Icons and Actions on the Legend section.

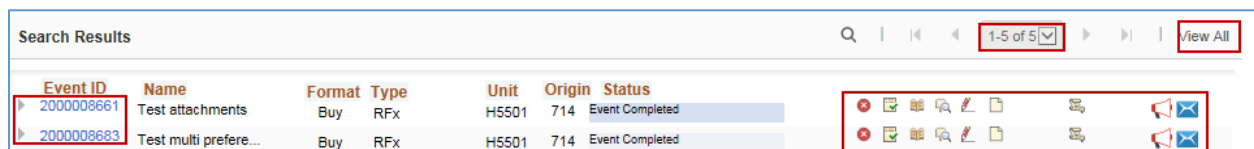
Icon Name	Icon/Action Description
Pause	Pauses the event so that the event creator can make changes while the event is happening. SWIFT displays this icon only for events with the Status of Posted.
Resume	Resumes a paused event so that bidders can continue bidding on the event. SWIFT displays this icon 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 vendor 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.

Icon Name	Icon/Action Description
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	Allows users to view collaboration input for the selected event.
Collaboration Available	Collaboration allows invited users, called collaborators, to review the event and suggest changes. Collaboration Available means that no other invited collaborators are currently accessing the event to suggest changes, and it is available for checkout.
Collaboration Checked Out	Indicates that a collaborator checked out an event to suggest changes. Until the event is checked back in, the event is not available for collaboration by anyone else. When you move your cursor over this button, SWIFT displays name of the person who checked out the event.
Bid History	Allows users to view the invitation and bid history for the selected event.
Notify Me on Check-In	Select this box to request notification when an event checked out for collaboration has been checked back in.
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.

3. 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*.



You have successfully reviewed the Event Workbench.