SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Respond to a Collaboration Request to Review an Event during Event Creation

As an optional step, event creators can invite other internal SWIFT users to collaborate on an event while they are creating it. An event creator can ask for input on the entire event or on a section in which the collaborator may have expertise or responsibility.

- Collaboration is inviting other internal users to review the event online and provide feedback on it before the agency opens it up for bidders.
- Event creators can accept or reject the feedback. SWIFT will track the feedback from each of the collaborators and keep it all in one place for future reference.
- The event creator and collaborators can see the event as changed by the previous collaborator.
- The collaboration will be routed to the individual collaborators via Worklist entry or email.

Collaboration is a date driven process. Users must complete the collaboration before the end date and time for their input ends, or SWIFT will close the collaboration step without their input.

This guide provides the steps for invited collaborators to respond to an internal collaboration request during event creation.

Steps to complete:

- Step 1: Check out the event
- Step 2: Provide input on the event
- Step 3: Check the event back in

## Overview of the steps to respond to a collaboration request

Step 1: Check out the event

When you receive notice that it is your turn for collaboration, check out the event.

1. Navigate to the **Event Workbench** page. Enter the *Event ID* and select the **Search** button.

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

2. SWIFT opens up the **Event Workbench** highlighting the event for the review. On the **Search Results** section, select the **Available for Checkout** icon next to the event.
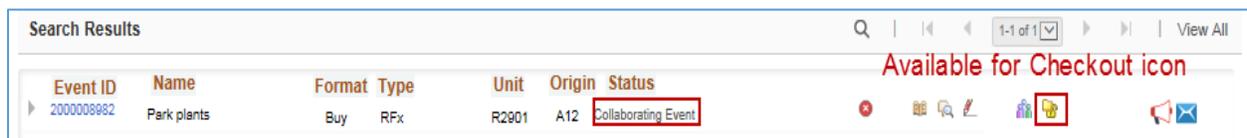
3.   SWIFT brings you to the **Modify an Event** page for that event.

You have checked out the event. No one else can make any updates until you are done. However, the event creator can cancel or update the collaboration process or remove collaborators at any time.

Step 2: Provide input on the event

SWIFT brings you to the **Event Summary** page for the selected event. Make all of your changes directly on the event. Select the **Save Event** button at the bottom of the page when you make suggestions to a section. You can leave and come back to the event later to review your edits.

1.   **Event Header:**

   a.   On the header of the **Event Summary** page, you can review and update the *Event Name, Description, Preview Date, Start* and *End Dates*.

2.   **Define Event Basics section:**

You can select **any of the** links to review and update.

- On the **Event Settings and Options** page, you can review and update the settings if needed.
- Add any desired comments or attachments in the **Comments and Attachments** section. Make sure the comments and attachments are internal only. Do not select the **Send to Bidder** checkbox.
- Make any updates to **Event Header Bid Factors** that may be needed.
- After you are done with each section, select the **Save Event Changes** button.
- Select the **Return to Event Overview** link.

3. **Event Lines:**

On the **Configure Line Items** section, select the **Line Items** link to review and update line information.

- SWIFT opens up the **Line Items** page. You can review, add a new line, delete an existing line, and update the items on the **Basic Definition** tab.

You can also update items on the **Advance Definition** tab.

- On the **Details** link, you can confirm or update the *Ship To* address.
- Using the **Line Comments and Attachments** icon, you can add comments and attachments on the line.
- **IMPORTANT:** Do not check the **Send to Bidder** box for internal comments.

- After you are done, select the **Save Event Changes** button to save any changes.
- Then, select the **Return to Event Overview** link.

4. **Invited Bidders:**

On the **Select Bidders to Invite** section, press the **Bidder Invitations** link to review and update this section.

- On the **Invite Bidders** page, review the **Public Event** box for accuracy. Use the **Search for Bidders** link to invite additional bidders.

- Use the delete icon at the end of the bidder row to delete a bidder from the event.
- After you are done, select the **Save Event Changes** button to save any changes.
- Then, select the **Return to Event Overview** link.

Step 3: Check the event back in

After you complete your review, save the event. Then, press the **Route** button on the bottom of the page.

- SWIFT will route the event to the next collaborator.
- The event creator and collaborators can see the event as changed by the previous collaborator.
- Once all collaborators complete their reviews, SWIFT notifies the event creator by email and worklist entry.

You have successfully responded to internal collaboration request on an event during event creation.