

QUICK REFERENCE GUIDE

February 20, 2024

Approve an Event

This Quick Reference Guide explains the steps to review and approve or deny an event in the Strategic Sourcing (SS) module in SWIFT. It provides an overview of approvals for events that require multiple levels of review and approval. At the end of this Quick Reference Guide, you can find an Appendix that is a checklist for reviewing the sections of events in SWIFT.

Approving events requires the Approver security role in SWIFT.

Events Requiring Multiple Levels of Review and Approval

Some events may require multiple levels of review and approval, prior to final review and approval by the buyer or event creator. In this case, SWIFT routes the event to approvers based on Business Unit, Origin, and Category.

During this review and approval process, each approver can either approve or deny the event from the Approval tile on the Administrative Portal.

- **Approve:** After an approver reviews and approve an event, SWIFT routes it to the next approver in the workflow.
- **Deny:** If any approvers deny the event, they must include comments about why the event they denied the event. SWIFT sends a notification to the buyer or event creator. After making any needed changes to the event, the buyer or event creator can save and repost the event, which restarts the review and approval process.

NOTE: While events are being reviewed for approval, SWIFT locks down several fields on that event, such as Description and Line Items.

- The only way to change those fields is to deny the event for approval and send it back to the buyer or event creator for edits.
- After the buyer or event creator makes changes to the event and resaves it in SWIFT, the event reroutes back to the beginning of the review and approval process.

IMPORTANT: After each approver reviews and approves the event, SWIFT routes it back to the buyer or event creator for final approval.

Steps to review and approve or deny an event

Step 1: The event creator or buy needs to ensure the event is submitted for review and approval

After posting an event on SWIFT, the event creator or buyer can approve the event by navigating to the **Approvals** tile on the Administrative Portal.

However, If multiple levels of approval are required, you can see the workflow and status of review and approval process in the event.

1. Select the **Event Approval Inquiry** link. Below the Event Approval Inquiry link, SWIFT includes a message indicating whether or not multiple levels of approval are required.

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.

Save Event

Post

Save As Template

Preview PDF

Related Links:

[Document Status Inquiry](#)
[View All Attachments for Event Plan Task Associations](#)

[Event Approval Inquiry](#)

Event ID: 2000014654 has been submitted for approval. If it is approved the Event Status will change to Posted. You may view the approval status for this event by selecting the Event Approval Inquiry link. Or, you may go to the Event Workbench to view the approval status for this event.

2. After selecting the Event Approval Inquiry link, SWIFT opens the Approval Status page in a separate page. It lists the approvers who need to review and approve the event.
3. After reviewing the workflow and status of the event in the approval process, select the **Return to Event Workbench** link to exit the Approval Status page.

Review/Edit Approvers

SS Workflow

Approval Status: Pending

ALP Events - RFB

Self Approved

✓

AUC Roleuser by Buyer ID

01/18/24 - 9:20 AM

→

Pending

AUC Role User by Requester

+

Comments

View/Hide Comments
Request Information
Start New Path

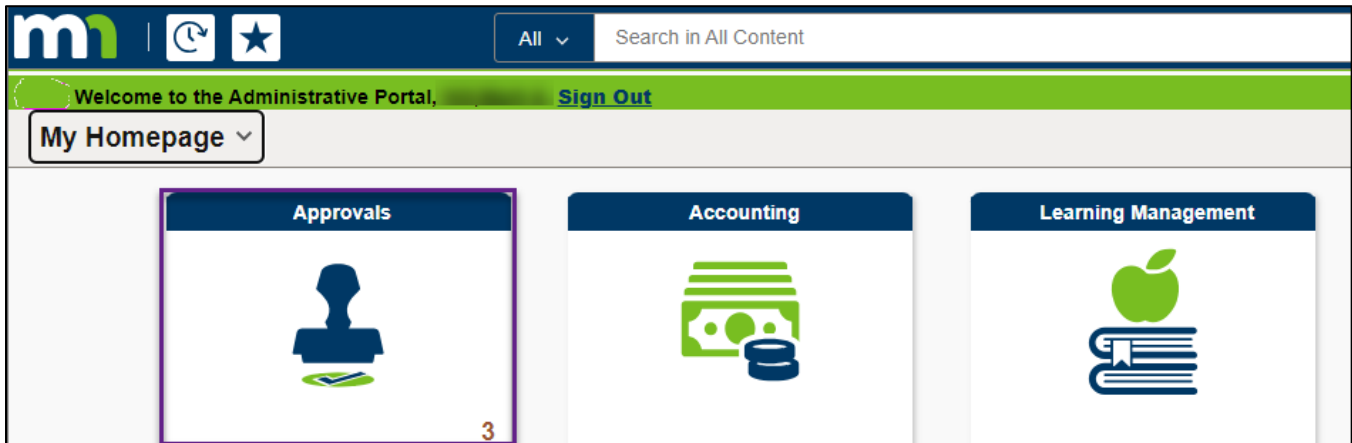
Return to Event Workbench

4. After each approver reviews and approves the event, SWIFT routes it back to the buyer or event creator for review and final approval. Review the next steps in this guide.

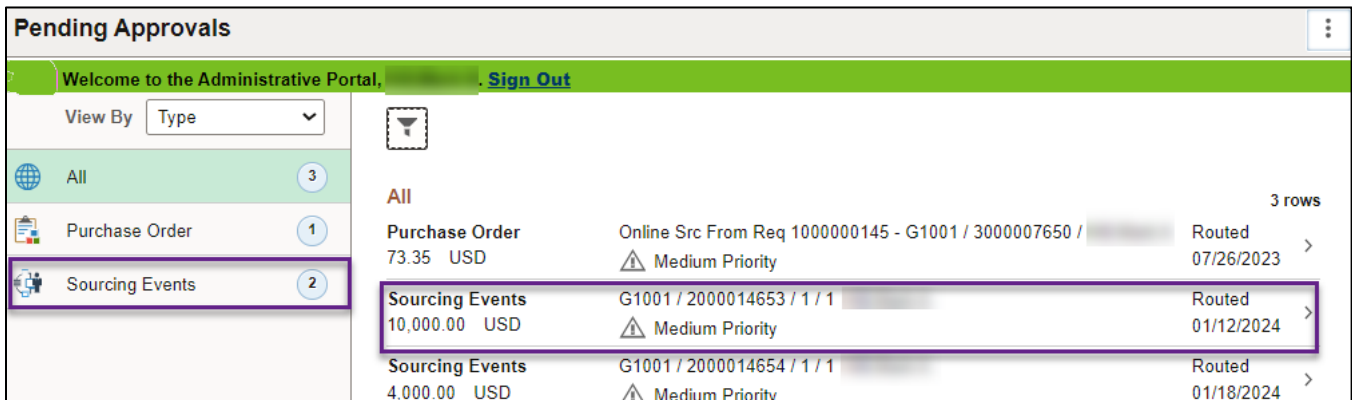
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Step 2: Review the event for accuracy

1. From the Administrative Portal, select the **Approvals** tile.



2. SWIFT displays Pending Approval page.
 - a. From the left-menu, select **Sourcing Events** category.
 - b. In the work area to the right, select the event to approve.



3. Review the **Event Header Details**, **Additional Header Information**, and **Line Details** for accuracy.

NOTE: Before you approve the event, you may need to update the **End Date** to make sure that the event remains open for the required amount of time, according to the agency's Authority for Local Purchase (ALP) requirements.

4. Select the **Event Details** link.

2000014654 / Office Furniture
4000.0000 USD

Approve

Deny

Event Header Details

Business Unit Minnesota Management & Budget

Event Name Office Furniture

Event Description Office Furniture

Format Buy

Type RFX

Payment Terms

Buyer ID 01141983 Hill,Mark A

Contact Name Hill,Mark A

Contact Phone 507/286-7571

Contact Email Address Swift.Testing@state.mn.us

Additional Header Information

Round 1

Version 1

Sealed Yes

Start Date 01/19/24 - 6:49 AM

End Date 01/26/24 - 6:49 AM

Event Status Pending Post Approval

Event Details

Line Details

Line	Group ID	Item ID	Description	Qty	UOM	Price	Ext.Amount
1			Furniture	10	EA	400.00 USD	4,000.00 USD

- SWIFT displays the Event Summary in a new window. Review the event steps for accuracy. Ensure all fields for the event comply with agency and ALP requirements.
- After reviewing the event, close the window to return to the Pending Approvals page.

Step 3: Approve or deny the event on SWIFT

As a general guide for reviewing events, view the **Checklist for Reviewing Events in SWIFT** at the end of this guide.

Approve the event

- On the Pending Approvals page, press the **Approval** button.

2000014654 / Office Furniture
4000.0000 USD

Approve

Deny

Event Header Details

Business Unit Minnesota Management & Budget

Buyer ID

- SWIFT displays the Approve window.
 - Enter any **comments**, if needed.
 - Press the **Submit** button.

Cancel Approve Submit

You are about to approve this request.

Approver Comments

3. SWIFT routes the event to the next approver in the review and approval process, if applicable.
4. When all the approvers review and approve the event, SWIFT updates the event status from “Pending Post Approval” to “Posted.”

Deny the event

1. If any information for the event is inaccurate or incorrect, press the **Deny** button.

2000014654 / Office Furniture

4000.0000 USD

Approve Deny

Event Header Details

Business Unit Minnesota Management & Budget Buyer ID

2. SWIFT opens the Deny window.
 - a. Make sure to enter **comments** explaining why you are denying the event.
 - b. Press the **Submit** button.

Cancel Deny Submit

You are about to deny this request.

Approver Comments

ADD COMMENTS WHY YOU ARE DENYING THE EVENT

3. SWIFT routes the event back to the buyer or event creator, who is responsible for correcting the event information.
4. After making any needed changes to the event information, the buyer or event creator can resave and repost the event for review and approval again.
5. After resaving and reposting the event, SWIFT restarts the review and approval process. Each approver needs to review and approve the event again.
6. When all approvers have finished reviewing and approving the event, SWIFT updates the event status from “Pending Post Approval” to “Posted.”

Appendix - Checklist for Reviewing the Sections of an Event

Event Summary page

- Origin
- Event Name
- Description
- Start Date/End Date

Step 1: Define Event Basics

- **Event Settings and Options**
 - Defaults
 - Award Template
 - Notifications
- **Event Comments and Attachments**
 - Comments
 - Send to Bidder box
 - Attachments, including the required Responder Declaration Documents
 - Display to Bidder box
- **Event Header Bid Factors**
 - Default bid factors, with one having a weighting of 100
 - Any new bid factors, if applicable

Step 2: Configure Line Items – Line Items

- **Basic Definition tab:** Category, UOM, Qty, and Start Price
- **Advanced Definition tab:** Details, including Due Date, Ship To, as well as Bid Factors, and Line Comments and Attachments, if applicable

Step 3: Select Bidders to Invite - Bidder Invitations

- **Public Event box:** Make sure this box is check marked for public events
- **Bidder Invitation List:** Make sure no bidders are missing