

QUICK REFERENCE GUIDE

January 15, 2021

Approve an Event

This Quick Reference Guide explains how to review and approve or deny an event in the Strategic Sourcing (SS) module 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. After each approver reviews and approves the event, SWIFT will route it back to the buyer or event creator for final approval.

During this review and approval process, each approver can either approve or deny the event from the **Approval** tile:

- **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 was denied. SWIFT will then send notification to the buyer or event creator, including the comments explaining why the event was denied. 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, several fields on that event will be locked (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.

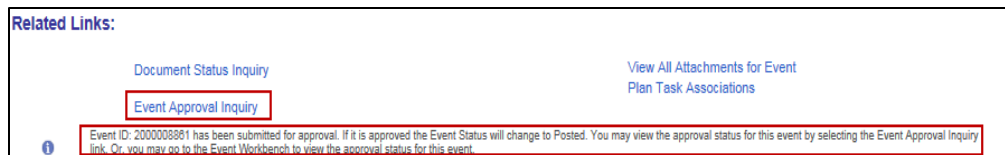
Steps to complete:

- Step 1: Make sure the event is submitted for review and approval.
- Step 2: Review the event for accuracy.
- Step 3: Approve the event on SWIFT.

Step 1: Make sure the event is submitted for review and approval.

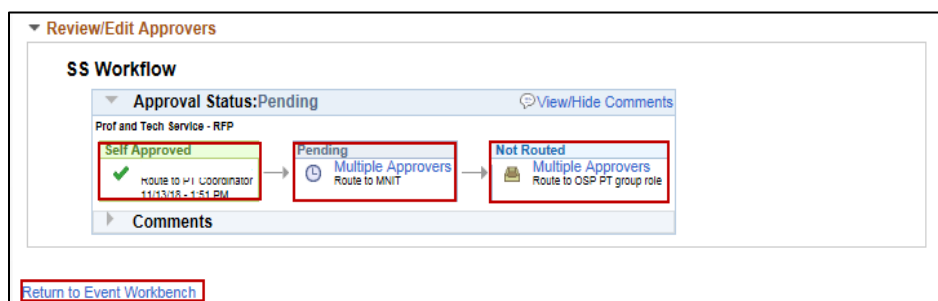
1. After posting an event on SWIFT, you can approve the event by navigating to the **Approvals** tile. However, if multiple levels of approval are required, you can see the workflow and status of the event in the review and approval process by selecting the *Event Approval Inquiry* link.

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Note: Below the *Event Approval Inquiry* link, SWIFT will also include a message indicating whether or not multiple levels of approval are required.

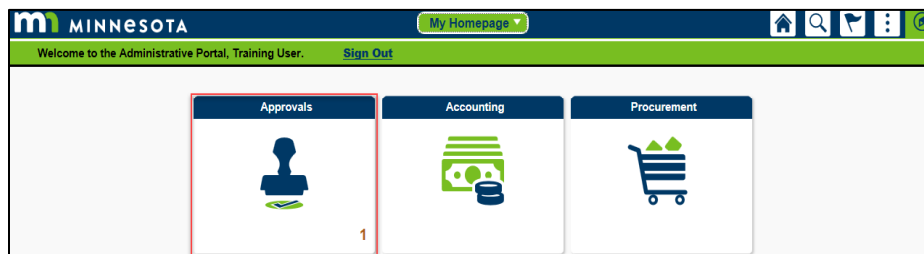
2. After selecting the *Event Approval Inquiry* link, the *Approval Status* page will display in a new browser tab or window, which lists the approvers who need to review and approve the event.
3. After reviewing the workflow and status of the event in the approval process, select the *Return to Event Workbench* link to exit the *Approval Status* page.



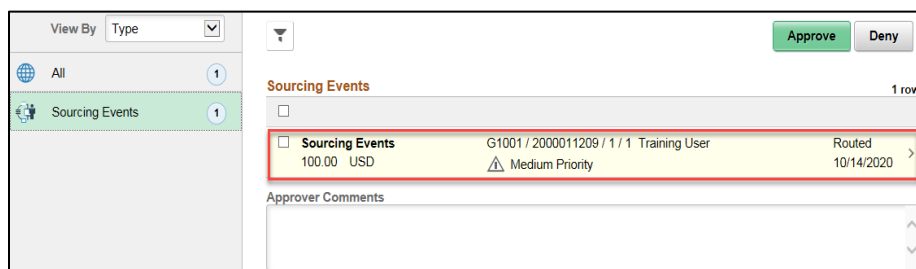
After each approver reviews and approves the event, SWIFT will route it back to the buyer or event creator for review and final approval—see next steps.

Step 2: Review the event for accuracy.

1. From the *Homepage*, select the **Approvals** tile.



2. The *Pending Approval* page will display. From the left-menu, select *Sourcing Events* category.
3. In the Work Area to the right, select the event to approve.



4. 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, as per the agency’s ALP requirements.

5. Select the *Event Details* link.

2000011209 / MMB RFB Conference Room Chair
100.0000 USD

[Approve](#) [Deny](#)

Event Header Details

Business Unit: Minnesota Management & Budget
Buyer ID: TRN19 Training User TRN19
Event Name: MMB RFB MityLite Tables & Chairs. This event is for MityLite Tables and Chairs. See the line items for specifications or any approved equal substitutes. THIS IS A FORMAL EVENT/SOLICITATION. Responders must submit their bids on the Supplier Portal. No Non-electronic or e-mail responses will be accepted. The response must be submitted no later than the date and time called for in the Finish Time in the Event Details. Your bid is not submitted until you select the 'Submit Bid' button. You will receive a confirmation message when your bid has been submitted. Print and save your confirmation. SWIFT CONTRACTOR ASSISTANCE HELPDESK. Contractors needing help with registration and/or completing their response to this Event in the Supplier Portal may contact the Contractor Assistance Helpdesk: 651.201.8100, Option 1. If your response does not comply with the solicitation requirements, it will be rejected. MMB will award the event to the lowest responsible bidder that meets the specifications and all terms and conditions. The State of Minnesota reserves the right to award items separately, by grouping items, or by total, whichever is deemed most advantageous to the State. Thank you for your interest and participation. Note: Suppliers who are registered only as bidders must register as suppliers before being awarded an event. Make sure that the registration occurs prior to the notice of intent to award.

Contact Name: Training User TRN19
Contact Phone:
Contact Email Address: Swift.Testing@state.mn.us

Format: Buy
Type: RFX
Payment Terms:

Additional Header Information

Round: 0
Version: 0
Sealed: Yes

Start Date: 12/31/23 - 12:00 AM
End Date: 12/31/23 - 12:00 AM
Event Status:

[Event Details](#)

Line Details

Line	Group ID	Item ID	Description	Qty	UOM	Price	Ext.Amount
1			Conference Room Chair	1	EA	100.00 USD	100.00 USD

6. The *Event Summary* page will display in a new browser tab or window. Review the event steps for accuracy, and ensure all fields for the event comply with agency and ALP requirements.

As a general guide for approving events, see the checklist below.

Checklist for Approving Events in SWIFT

A. *Event Summary* page

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

B. *Step 1: Define Event Basics*

- *Event Settings and Options:*
 - Defaults
 - Award Template
 - Notifications
- *Event Comments and Attachments:*
 - *Comments*

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- **Send to Bidder box**
 - *Attachments* (including 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)
- C. *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)
- D. *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
- E. *Step 4: Invite Collaborators* (if applicable)
- Due date
 - Collaborators
 - Permissions

Step 3: Approve the event on SWIFT.

1. If all information is accurate on the *Event Summary* page, close the browser tab or window to return to the *Pending Approvals* page.
2. Back on the *Pending Approvals* page, press the **Approve** button to approve the event.

2000011209 / MMB RFB Conference Room Chair
100.0000 USD

Approve Deny

Event Header Details

Business Unit: Minnesota Management & Budget
Buyer ID: TRN19 Training User TRN19

Event Name:
Contact Name: Training User TRN19

Event Description: MMB RFB MityLite Tables & Chairs. This event is for MityLite Tables and Chairs. See the line items for specifications or any approved equal substitutes. THIS IS A FORMAL EVENT/SOLICITATION. Responders must submit their bids on the Supplier Portal. No Non-electronic or e-mail responses will be accepted. The response must be submitted no later than the date and time called for in the Finish Time in the Event Details. Your bid is not submitted until you select the 'Submit Bid' button. You will receive a confirmation message when your bid has been submitted. Print and save your confirmation. SWIFT CONTRACTOR ASSISTANCE HELPDESK. Contractors needing help with registration and/or completing their response to this Event in the Supplier Portal may contact the Contractor Assistance Helpdesk: 651.201.9100. Option 1. If your response does not comply with the solicitation requirements, it will be rejected. MMB will award the event to the lowest responsible bidder that meets the specifications and all terms and conditions. The State of Minnesota reserves the right to award items separately, by grouping items, or by total, whichever is deemed most advantageous to the State. Thank you for your interest and participation. Note: Suppliers who are registered only as bidders must register as suppliers before being awarded an event. Make sure that the registration occurs prior to the notice of intent to award.

Contact Email Address: Swift.Testing@state.mn.us
Contact Phone:
Event Status: [Event Details](#)

Format: Buy
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Additional Header Information

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Start Date: 12/31/23 - 12:00 AM
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Line Details

Line	Group ID	Item ID	Description	Qty	UOM	Price	Ext.Amount
1			Conference Room Chair	1	EA	100.00 USD	100.00 USD

3. After pressing the **Approve** button, the *Approve* window will display. Enter any comments, if needed, and press the **Submit** button.

Approve

Cancel **Submit**

You are about to approve this request.

Approver Comments

- After pressing **Approve** and **Submit**, SWIFT will route the event to the next approver in the review and approval process, if applicable.
- When all the approvers review and approve the event, SWIFT will update the event status from “Pending Post Approval” to “Posted.”

Denying an event on SWIFT

Note: If any information for the event is inaccurate or incorrect, press the **Deny** button instead of the **Approve** button. If you select the **Deny** button, the *Deny* window will display. Make sure to enter comments explaining why the event is denied approval, and press the **Submit** button.

Deny

Cancel **Submit**

You are about to deny this request.

Approver Comments

Extend the bidder invitations to include TG,ED, VO bidders, per ε

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- After pressing **Deny** and **Submit**, the event will route back to the buyer or event creator, who is then responsible for correcting the event information.
- 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.
- Note that resaving and reposting the event will restart the review and approval process, so each approver will need to review and approve the event again.
- When all approvers have finished reviewing and approving the event, SWIFT will update the event status from “Pending Post Approval” to “Posted.”