

## QUICK REFERENCE GUIDE

Updated January 15, 2021

### Award an Event

After analyzing an event, you can award the event. This Quick Reference Guides explains how to award the event to a supplier, post the award, and create a new purchase order or procurement contract for the awarded event.

#### Steps to complete

- Step 1: Open the event using the Event Workbench.
- Step 2: Attach documentation for the Event Scoring Tabulation Sheet to the event.
- Step 3: Award the event and complete the award details.
- Step 4: Post the award.
- Step 5: Make the event documentation public.

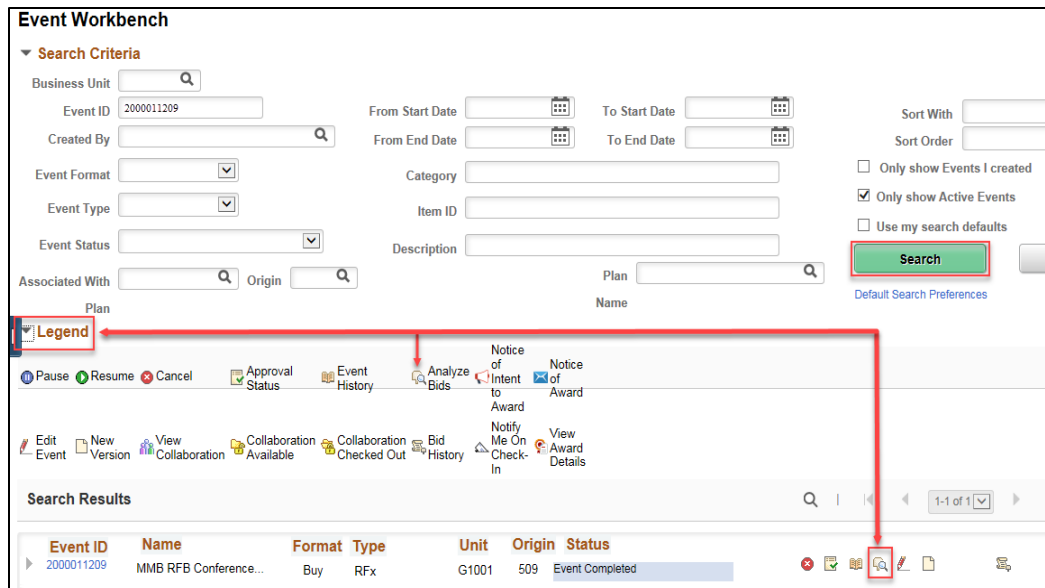
#### Step 1: Open the event using the Event Workbench.

1. Navigate to the *Event Workbench* page.

| Navigation Options    | Navigation Path   |
|-----------------------|---|
| Navigation Collection | Procurement, Strategic Sourcing, Maintain Events.<br>The <i>Event Workbench</i> page will display by default. |
| WorkCenter            | Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, left-menu, Sourcing folder, Event Workbench.   |

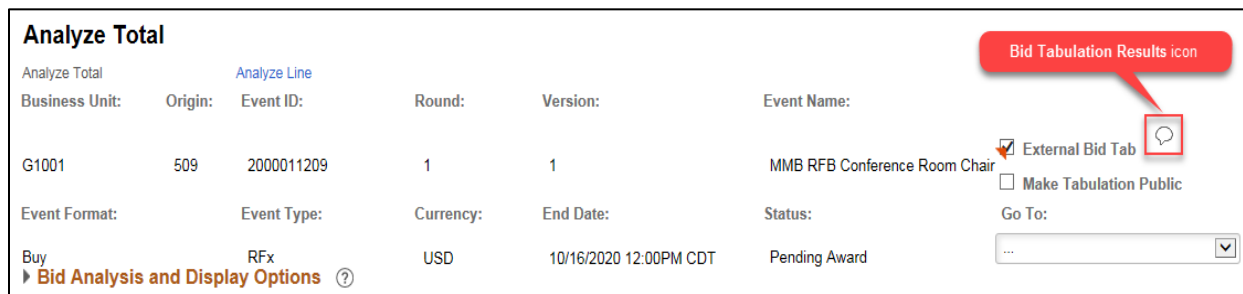
2. On the *Event Workbench* page, enter the event identification number in the *Event ID* field.
3. Press the **Search** button.
4. The event will display in the *Search Results* section. Select the **Analyze Bids** icon for the event. (This icon becomes available after the event's *End Date* and *Time* have passed.)

*Hint:* To display the "Legend" that identifies the icons on this page, open the *Legend* section.

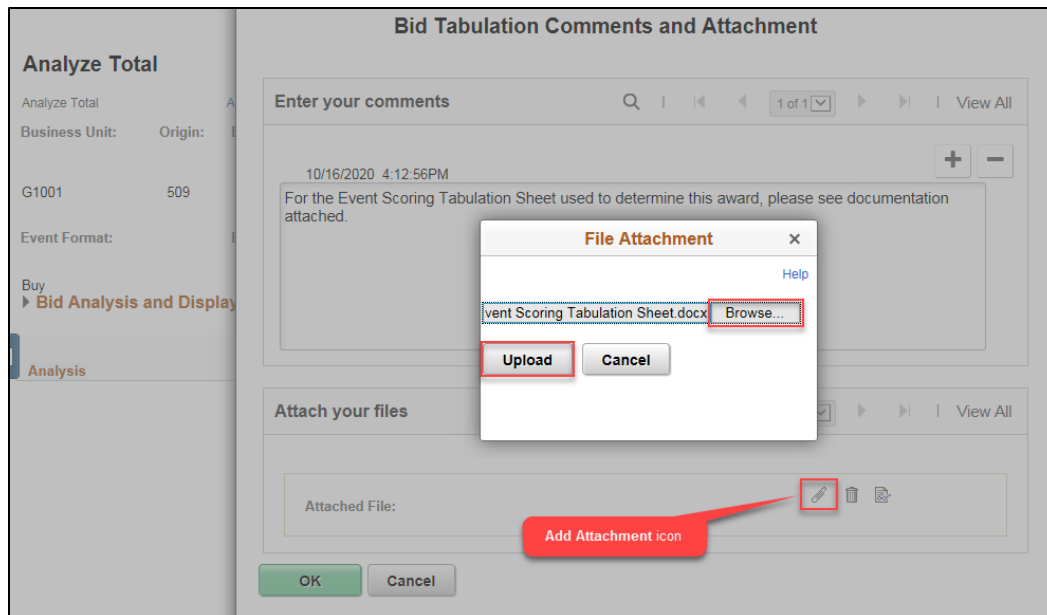


## Step 2: Attach documentation for the Event Scoring Tabulation Sheet to the event.

1. The *Analyze Total* page will display for the event. Select the **Bid Tabulation Results** icon.



2. The *Bid Tabulation Comments and Attachment* window will display. Enter comments to describe the attachment. (Example: “For the Event Scoring Tabulation Sheet used to determine this award, please see documentation attached.”)
3. Select the **Add Attachment** (paperclip) icon, attach the “Event Scoring Tabulation Sheet” or other offline scoring form comparing document bid responses, and press the **Upload Button**.
4. Press **OK**.



### Step 3: Award the event and complete the award details.

**Note:** There are different ways to award an event. For instance, you can award the event to one bidder or to more than one bidder, and you can award an event at the line level.

1. On the *Analyze Total* page, and scroll down to the *Analysis* section.
2. From the *Bid Action* drop-down list, select “Award” for the bidder to be awarded the event.
3. In the *Award by Percent* field, enter “100” percent for the bidder being awarded the event.
4. Press the **Save** button.



**Note:** If the event has multiple lines, you can also award the event at the line level:

- Select the *Analyze Line* link to open the *Analyze Line* page.
- Select the *Analyze* link for an event line to open *Bid Analysis and Display Options*.
- In the *Bid Action* field, select “Award” under the column for the supplier you’re awarding the event to.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- In the *Award Quantity* field, enter the number of items you’re awarding to that supplier.
- Then use the **Previous Line** and **Next Line** buttons to move between event lines.
- Press **OK** when finished.

5. Scroll up to the top of the page, and from the *Go To* field, select “Award Events” from the drop-down list.

The screenshot shows a table with the following data:

| Business Unit: | Origin:     | Event ID:  | Round:                 | Version:      | Event Name:                   |
|----------------|-------------|------------|------------------------|---------------|-------------------------------|
| G1001          | 509         | 2000011209 | 1                      | 1             | MMB RFB Conference Room Chair |
| Event Format:  | Event Type: | Currency:  | End Date:              | Status:       |                               |
| Buy            | RFx         | USD        | 10/16/2020 12:00PM CDT | Pending Award |                               |

Additional fields and options shown include: *Analyze Total*, *Analyze Line*,  External Bid Tab,  Make Tabulation Public, and a *Go To:* dropdown menu with options: ...Analyze Export, Associate Planning Task, and Award Events.

6. The *Award Details* page will open in a new window or tab. Scroll down to the *Award Details* section, and from the *Award Type* field, select either “Purchase Order” or “Procurement Contract” from the drop-down list, depending on the acquisition type.

The screenshot shows the **Award Details** page with a **Bidder Name** field and an **Award Type** dropdown menu. The dropdown menu is open, showing the following options: Procurement Contract and Purchase Order.

**Note:** If you select “Procurement Contract,” SWIFT will display a *Contract Style* field, where you will need to select “PO Contract” from the drop-down list. The example below will demonstrate the “Purchase Order” option.

7. Enter the *Award Details* in the following fields.

| Field                   | Field Information   |
|-------------------------|---|
| <b>Award Currency</b>   | Make sure “Event” is selected                               |
| <b>PO Business Unit</b> | The Business Unit (Example: “G1001” for MMB)                |
| <b>Origin</b>           | The division (Example: “509” for Accounting Services)       |
| <b>Buyer</b>            | Your buyer ID (if it doesn’t already default in this field) |
| <b>Terms</b>            | The Payment Terms (Example: “030” for Net 30)               |
| <b>Billing Location</b> | The Billing Location (Example: “G104THFL00” for MMB)        |

8. Press the **Save** button.

**Note on Bidder Conversion:** If you awarded an event to a bidder who is not yet a fully registered supplier, SWIFT will display a *Bidder Conversion* message. Press **OK**.

- SWIFT does not allow you to create purchase orders or procurement contracts with bidders who are not registered as suppliers on SWIFT.
- If any bidders are not registered as suppliers, you may need to contact them and remind them to register as a supplier if they want to receive an award for the event.
- If you award the event to multiple bidders, SWIFT allows you to award it only to fully registered suppliers but not to bidders who are not yet registered as suppliers.

**Note on Ship To Information:** If you need to add *Ship To* information to the lines of an event, you receive a Ship To error message. Press **OK**.

- Make sure to update the event if you receive a Ship To error message.
- See the Create an Event Quick Reference Guide.

## Step 4: Post the award.

1. Press the **Post Award** button.

**Award Details**

Award Details    Award Summary    Review Constraints

Business Unit: G1001    Origin: 509    Event ID: 2000011209    Round: 1    Version: 1    Event Name: MMB RFB Conference Room Chair

Event Format:    Event Type:    Currency:    End Date:    Status:    Go To: [...]

Buy    RFX    USD    10/16/2020 12:00PM CDT    Pending Award

▼ Show Award Details to Bidders

Display bids     Display all bids     Display bid scores     Display bid's total bid price     Display factors

**Award Details** (?)

Bidder Name [ ]    Bidder Type [ ]    Supplier [ ]    Buyer: TRN19 [Q]

Award Type: Purchase Order [v]    Award Currency: Event [v]    USD    Terms: 030 [Q]

PO Business Unit: G1001 [Q]    Origin: 5 [Q]    Billing Location: G104THFL00 [Q]

Award Number: 1    Total Award: 100.0000

**Award Lines**

| Line | Item ID | Supp/Item Rel            | Item Description      | Group ID | UOM | Award Quantity | Awarded Price | Extended Price |     |
|------|---------|--------------------------|-----------------------|----------|-----|----------------|---------------|----------------|-----|
| 1    |         | <input type="checkbox"/> | Conference Room Chair |          | EA  | 1.0000         | 100.0000      | 100.0000       | [ ] |

**Post Award**

2. A confirmation message will appear asking if you wish to send a Notice of Intent to Award. Press **Yes** to continue.

Notice of Intent to Award is not sent for this event. (18058,8692)

Do you wish to continue?

**Note:** Posting the award automatically creates a new purchase order (or procurement contract, depending on what you selected in the *Award Type* field on the *Award Details* page).

Also, SWIFT does not send out the Notice of Intent to Award and Notice of Award automatically, so you will need to determine whether or not to send these documents.

3. *Optional:* You can send the Notice of Intent to Award (NOIA) or a Notice of Award (NOA) to the bidders on the event. To send out either of these notices, select them from the *Go To* field on the *Award Details* page.
4. The *Purchase Order* page will open in a new browser tab or window. Press the **Save** button to save the new purchase order. **Note:** If you award to a contract rather than a PO, you'll open a contract shell instead of a purchase order.

Maintain Purchase Order

### Purchase Order

Business Unit: G1001    Origin: 509    Accounting Services    PO Status: Open    Budget Status: Not Chk'd

PO ID: 3000005651    Copy From: [Dropdown]

**Header**

\*PO Date: 10/19/2020    Expiration Date: [Dropdown]    \*Supplier: [Search]    \*Supplier ID: [Search]    \*Buyer: TRN19    PO Reference: [Search]    \*Billing Location: G104THFL00

Response Documentation    Supplier Search    Supplier Details    Training User TRN19    Billing Address    Activity Summary    Add Comments    Add ShipTo Comments    Document Status

Doc Tol Status: Valid    Receipt Status: Not Recvd    \*Dispatch Method: Email    Document Type: POR    Agency Reference: [Search]    Exempt From WFC:

**Amount Summary**

|                     |               |            |
|---------------------|---------------|------------|
| Merchandise         | 100.00        |            |
| Freight/Tax/Misc.   | 7.88          |            |
| <b>Total Amount</b> | <b>107.88</b> | <b>USD</b> |

Encumbrance Balance

**Add Items From**    Catalog    Purchasing Kit    Item Search

**Select Lines To Display**    Search for Lines    Line: [Search]    To: [Search]    Retrieve

**Lines**

Details    Ship To/Due Date    Statuses    Item Information    Attributes    RFQ    Contract    Receiving

| Line | Item     | Description           | PO Qty | *UOM | Category | Price     |
|------|----------|-----------------------|--------|------|----------|-----------|
| 1    | [Search] | Conference Room Chair | 1.0000 | EA   | 56101500 | 100.00000 |

View Printable Version    \*Go to: [Dropdown]

View Approvals

**Save**    Return to Search    Notify    Refresh

- After saving the new purchase order or procurement contract, you can close that page and return to the *Award Details* page. After awarding the event to the supplier(s), the Status field will read "Awarded." **Note:** If you have only partially awarded the event, the Status field will read "Pending Award."

## Step 5: Make the event documentation public.

According to [the Department of Administration’s Authority for Local Purchase Purchasing Policy 10](#), the names of responders to solicitations for Request for Proposals (RFPs) become public at the bid opening; and the names of responders as well as the dollar amounts in the bids become public for Request for Bids (RFBs) at the bid opening. SWIFT displays these results on the Supplier Portal.

- Navigate to the *Event Workbench* page.

| Navigation Options           | Navigation Path   |
|------------------------------|---|
| <b>Navigation Collection</b> | Procurement, Strategic Sourcing, Maintain Events.<br>The <i>Event Workbench</i> page will display by default. |

| Navigation Options | Navigation Path   |
|--------------------|---|
| WorkCenter         | Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, left-menu, Sourcing folder, Event Workbench. |

2. Enter search criteria for the event (example: *Business Unit, Event ID*, etc.), and make sure the **Only Show Active Events** box is not check marked.
3. Press the **Search** button.
4. The event will display in the Search Results below. Select the **Analyze Bids** icon for the event.

5. The *Analyze Total* page will display. Check mark the **Make Tabulation Public** box.
6. Press the **Save** button.

**You have successfully awarded an event in SWIFT!**