

## QUICK REFERENCE GUIDE

November 1, 2019

### Use Award Notices on an Event

Buyers can inform bidders of the results of the event's event bid analysis and decision to award it. These optional notifications are informational and are not legally binding

SWIFT has two optional award templates that are available for agency use.

#### 1. Notice of Intent to Award:

A Notice of Intent to Award (NOIA) is an optional email notification from SWIFT to the bidders that the evaluation team selected a potential winning bidder for the event. It can be sent to all bidders or only one bidder.

- An NOIA can be processed only after a buyer has completed event bid analysis.
- The NOIA page is available only if you check the Allow Send NOIA Notification box in the Event Settings and Options page of the Define Event Basics section of an event.
- The NOIA icon is available in the Event Workbench or the Go To Menu after the event end date and time has passed.

#### 2. Notice of Award:

A Notice of Award (NOA) is an optional email notification from SWIFT to the winning bidder or bidders to be awarded a contract or purchase order.

- An NOA can be processed only after a buyer has awarded the event in SWIFT.
- The NOA page is available only if you check the Allow Send NOA Notification box in the Event Settings and Options page of the Define Event Basics section of an event.
- The NOA icon is available in the Event Workbench or the Go To Menu after the event has a Status of "Awarded".
- SWIFT will also send an associated Notice of Non Award (NONA) to bidders not selected for an award.

This guide describes the recommended steps to use the Notice of Intent to Award and the Notice of Award using SWIFT.

Steps to send a NOIA or NOA

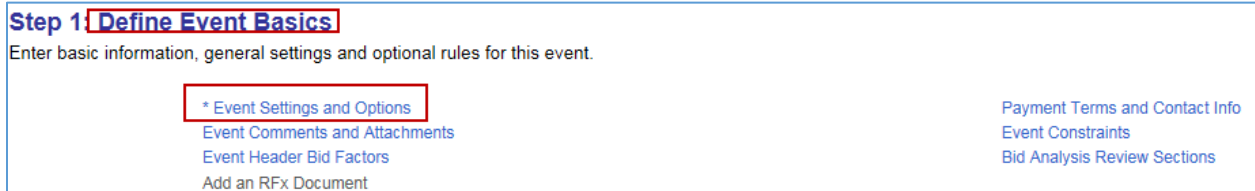
- Step 1: Create an event and ensure that award notices are set up
- Step 2: Access the event in the Event Workbench
- Step 3: Send the notice through the Process Monitor

## Steps to use the Notice of Intent to Award

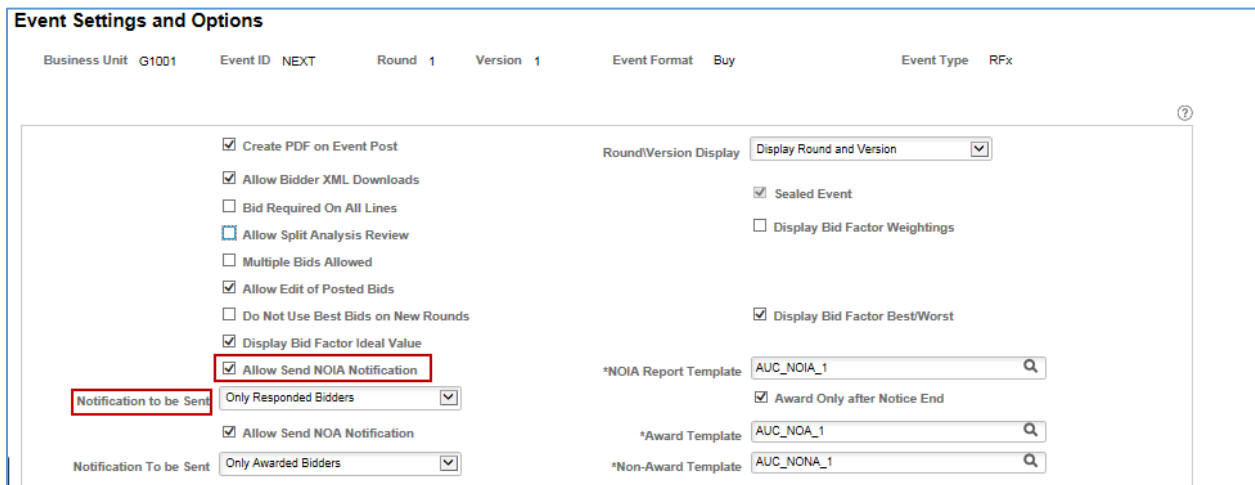
### Step 1: Create an event and ensure that award notices are set up

When you create an event, make sure that you can send notices. In most cases, you will keep the defaults set up on the **Event Settings and Options** page.

1. On the **Define Event Basics** of the Event Creation page, select the **Event Settings and Options** link.



2. On the **Event Settings and Options** page, check the **Allow Send NOIA Notification** box.



3. Confirm or update these fields to allow for the NOIA.

Field Name	Field Description
<b>Allow Send NOIA Notification (Notice of Intent to Award)</b>	Defaults as checked. Refers to communication from SWIFT to the bidders that an award is forthcoming.
<b>Notification to be Sent</b>	This field only appears if you check the Allow Send NOIA Notification box. The value can be changed when the buyer sends the NOIA. Options include: <ul style="list-style-type: none"> <li>• All Bidders</li> <li>• Only Responded Bidders</li> <li>• Specific Bidders</li> </ul>

4. Complete the event as required.

## Step 2: Access the event in the Event Workbench

1. Navigate to the **Event Workbench** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, Left Menu, Sourcing, Event Workbench page.

2. On the **Event Workbench** page, enter search criteria and then select the **Search** button.
3. SWIFT displays the event on the **Search Results** section. Select the **Notice of Intent to Award** icon for that event.

**Event Workbench**

Search Criteria

Business Unit [ ]

Event ID **8018** From Start Date [ ] To Start Date [ ] Sort With [ ]

Created By [ ] From End Date [ ] To End Date [ ] Sort Order [ ]

Event Format [ ] Category [ ]  Only show Events I created

Event Type [ ] Item ID [ ]  Only show Active Events

Event Status [ ] Description [ ]  Use my search defaults

Associated With [ ] Origin [ ] Plan [ ] Name [ ] **Search** **Reset**

Legend

Search Results 1-1 of 1 | View All

Event ID	Name	Format	Type	Unit	Origin	Status	
2000008018	Test	Buy	RFx	R2901	A12	Pending Award	<b>Notice of Intent to Award icon</b>

SWIFT brings you to the **Notice of Intent to Award** page for that event.

## Step 3: Send the notice

1. SWIFT brings you to the **Notice of Intent to Award** page for that event. Confirm or enter information on this page.
  - Enter an *End Date* (Required for this process).

**IMPORTANT!** You cannot award the event in SWIFT until after this *End Date*.

- Select an option on the **Notifications to be Sent** section.
- You can add additional emails (such as yourself) to receive a copy of the notice by selecting the Add Additional Emails button and entering them.
- You can add attachments or comments to the notice.
- You can also preview the NOIA.
- Save it.

**Notice of Intent to Award**

Business Unit: R2901      Event ID: 2000008884      Event Name: Leadership Training      NOIA Status: Not Sent  
 Event Type: RFx      Event Round: 1      Event Version: 1      Event Status: Pending Award  
 Event Format: Buy      Currency: USD      Event End Date: 12/28/2018 7:25AM CST      Notice End Date: [ ]

**Notification to be Sent**

All Bidders       Only Responded Bidders       Specific Bidders

**Bidder Details**

Select	Name	Bidder Setid	Bidder ID	Bidder Type	Bidder Location	Contact	Responded	Email ID
<input checked="" type="checkbox"/>	3M COMPANY	SHARE	0000209723	Supplier	001	1	Yes	Swift.Testing@state.mn.us
<input checked="" type="checkbox"/>	TEST	SHARE	0000389412	Supplier	001	1	Yes	Swift.Testing@state.mn.us
<input checked="" type="checkbox"/>	THINK GREAT LLC	SHARE	0000937693	Supplier	001	1	Yes	Swift.Testing@state.mn.us

[Add Additional Emails](#)

**Template Contents**

\*NOIA Report Template: AUC\_NOIA\_1      \*View Summary By: Header      Signatory Contact(s)

[Add Attachment](#)      [Notification Comments](#)

[Preview NOIA](#)      [Send NOIA](#)      [Process Monitor](#)

[Save](#)      [Return to Search](#)      [Notify](#)

- When you are ready, press the **Send NOIA** button.
- SWIFT displays a message. Press the **OK** button.

Process for sending out notification has been scheduled with Process instance 25850136 (18058,8625)

[OK](#)

2. Track the status of the notice. Press the **Process Monitor** link.

SWIFT opens up the **Process Monitor** page. The *Process Name* is "AUC\_NOIA". When the *Run Status* is "Success" and the *Distribution Status* is "Posted", SWIFT sent out the NOIA email to the selected bidders.

[Process List](#)      [Server List](#)

**View Process Request For**

User ID: [ ]      Type: [ ]      Last: [ ]      [ ]      Days: [ ]      [Refresh](#)

Server: [ ]      Name: [ ]      Instance From: [ ]      Instance To: [ ]

Run Status: [ ]      Distribution Status: [ ]       Save On Refresh

**Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	25850136		Application Engine	AUC_NOIA	00744476	01/04/2019 3:34:22PM CST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	25850135		Application Engine	AUC_NOIA	00744476	01/04/2019 3:34:12PM CST	Success	Posted	<a href="#">Details</a>

Here's a sample NOIA preview.

Bid Event: 2000008884-Leadership Training  
Leadership  
01/04/2019

Natural Resources Department announces its intent to Award to the following applicant(s).

**THINK GREAT LLC, PRIOR LAKE, MN**

The following applicant(s) have also submitted bid responses

Bidder	Rejection Reason
3 M CO ST PAUL	Not Awarded
TEST	Not Awarded

You have successfully sent a Notice of Intent to Award email from an event.

## Steps to use the Notice of Award

### Step 1: Create an event and ensure that award notices are set up

When you create an event, make sure that you can send notices. In most cases, you will keep the defaults set up on the **Event Settings and Options** page. This process is explained in detail in this guide in Step 1 of the Steps to use the Notice of Intent to Award.

- On the **Define Event Basics** of the Event Creation page, select **Event Settings and Options**.

**Step 1: Define Event Basics**

Enter basic information, general settings and optional rules for this event.

- [\\* Event Settings and Options](#)
- [Event Comments and Attachments](#)
- [Event Header Bid Factors](#)
- [Add an RFX Document](#)

- [Payment Terms and Contact Info](#)
- [Event Constraints](#)
- [Bid Analysis Review Sections](#)

- On the **Event Settings and Options** page, check the **Allow Send NOA Notification** box.

Notification to be Sent Only Responded Bidders

**Allow Send NOA Notification**

Notification To be Sent Only Awarded Bidders

Award Only after Notice End

\*Award Template

\*Non-Award Template

## Step 2: Access the event in the Event Workbench

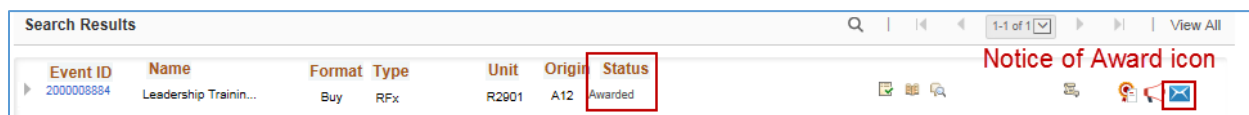
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2. On the **Event Workbench** page, enter search criteria and then select the **Search** button.

SWIFT displays the event on the **Search Results** section. Select the **Notice of Award** icon for that event.

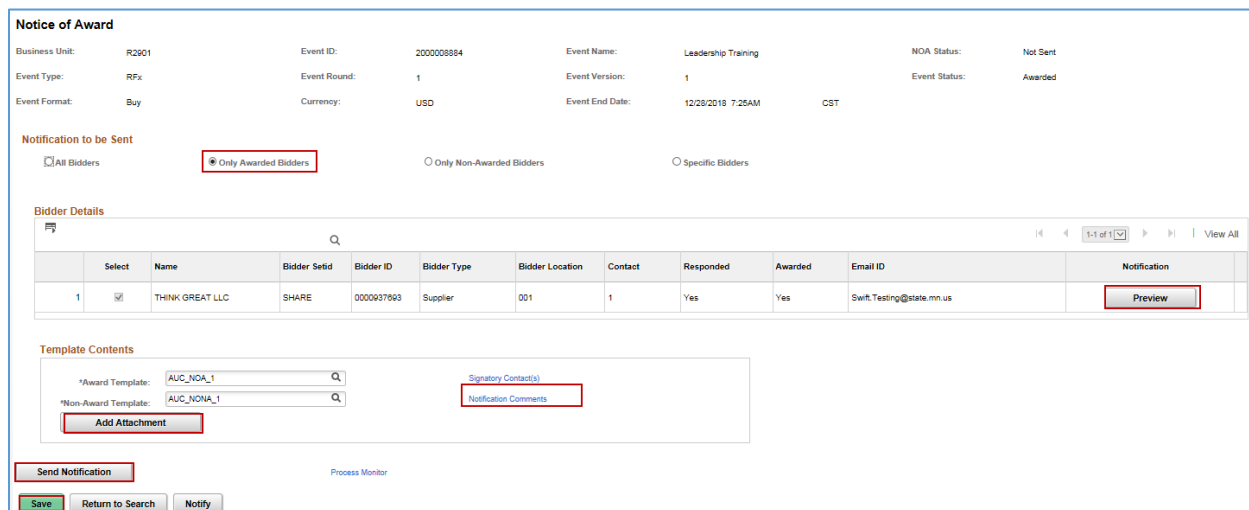
**NOTE:** the *Status* must be "Awarded".



SWIFT brings you to the **Notice of Award** page for that event.

## Step 3: Send the notice

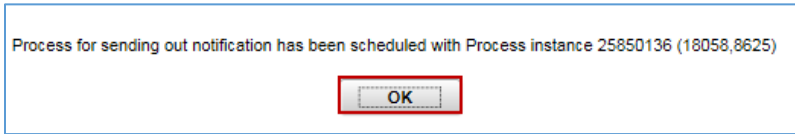
1. SWIFT brings you to the **Notice of Award** page for that event. Confirm or enter information on this page.
  - Update the **Notifications to be Sent** selection if needed.
  - You can add attachments or comments to the notice.
  - SWIFT also sends a Notice of Non Award (NONA) to bidders not selected for an award.
  - You can preview the NOA.
  - Save it.



- When you are ready, press the **Send Notification** button.

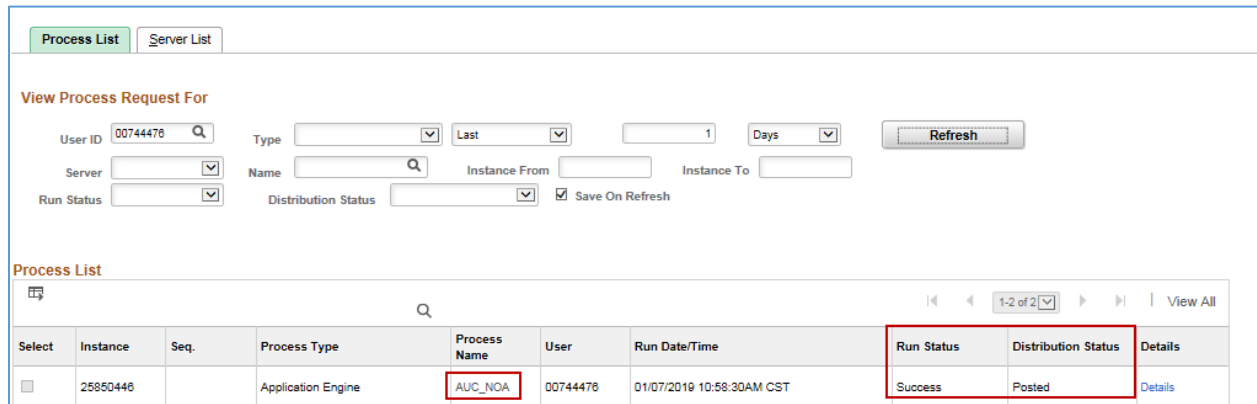
# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- SWIFT displays a message. Press the **OK** button.

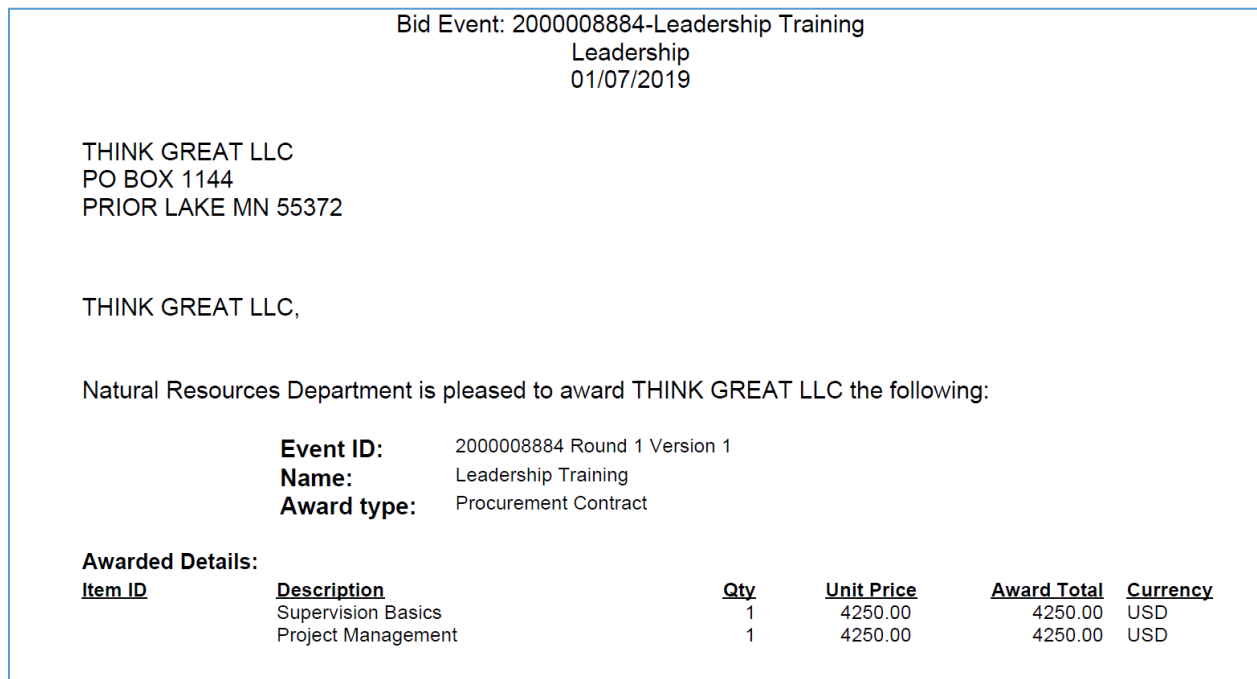


2. Track the status of the notice. Press the **Process Monitor** link.

SWIFT opens up the **Process Monitor** page. The *Process Name* is “AUC\_NOA”. When the *Run Status* is “Success” and the *Distribution Status* is “Posted”, SWIFT sent out the NOA email to the selected bidders.



If you selected the **Preview** button, SWIFT will show you an example of the Notice of Award email.



**You have successfully sent a Notice of Award email from an event.**