

# **QUICK REFERENCE GUIDE**

February 20, 2024

# **Use Award Notices on an Event**

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

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.

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## 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.

Event Settings and Options				
Business Unit G1001	Event ID NEXT Round 1	Version 1 Event I	Format Buy Event Type	RFx
	Create PDF on Event Post Allow Bidder XML Downloads Bid Required On All Lines Multiple Bids Allowed	Round\Version Display	Display Round and Version  Sealed Event Display Bid Factor Weightings	
	Allow Edit of Posted Bids		🗹 Display Bid Factor Best/Worst	
Notification to be Sent	Display Bid Factor Ideal Value     Allow Send NOIA Notification     Only Responded Bidders	*NOIA Report Template	AUC_NOIA_1  Award Only after Notice End	Q
	Allow Send NOA Notification	*Award Template	AUC_NOA_1	Q
Notification To be Sent	Only Awarded Bidders 🗸	*Non-Award Template	AUC_NONA_1	Q

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

Field Name	Field Description
Allow Send NOIA Notification (Notice of Intent to Award)	Defaults as checked. Refers to communication from SWIFT to the bidders that an award is forthcoming.
Notification to be Sent	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:
	All Bidders
	Only Responded Bidders
	Specific Bidders

4. Complete the event as required.

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

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

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Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
WorkCenter	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.

> [	Legend															
S	earch Results	\$						Q	I	K	<	1-1 of 1 💙	>		I	View All
+	Event ID 2000015240	Name Sit/Stand Workstat	Format Buy	<b>Type</b> RFx	Unit G1001	Origin <sup>509</sup> Pe	Status ending Award	8		ß ᠺ	Į_	Ľ	E.	ç	្ព	×
															No	tice of Intent to Awa

#### 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.

Notio	ce of I	Intent to Awa	ard							
Buelne	es Unit:	G1001	Event ID:	2000015240		Event Name:	Sit/Stand Workstation	s	NOIA Status:	Not Sent
vent 1	Туре:	RFx	Event Roun	d: 1		Event Version:	2		Event Status:	Pending Award
vent F	Format:	Buv	Currency:	USD		Event End Date:	01/26/2024 9:51AM	CST	Notice End Date:	02/22/2024
	Oall	n to be Sent Bidders	Only Re	sponded Bidders		⊖ spi	cific Bidders			
B	idder D	Q								K < 1-1 of 1 🗸
		Select	Name	Bidder Setid	Bidder ID	Bidder Type	Bidder Location	Contact	Responded	Email ID
		1 🖾	RHEMA SYSTEMS INC	SHARE	0001035000	Supplier	001	1	Yes	Swift.Testing@state.mn.us
		te Contents		c		nmary Ry: Header	~	Signatory Contact(s)		Add Additional Emails
		DIA Report Templat Add Attachr						Notification Commer		
Sav		Return to Search	Send NOIA		Proc	ess Monitor				
-		readen to ocuren								

a. Enter an End Date (Required for this process).

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

b. Select an option on the **Notifications to be Sent** section.

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- c. 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.
- d. You can add attachments or comments to the notice.
- e. You can also preview the NOIA.
- f. Save it.
- 2. When you are ready, press the Send NOIA button.
- 3. SWIFT displays a message. Press the **OK** button.

Process for sending out notification has been	n scheduled with Process instance 44856805 (18058,8625)
	ОК

4. Track the status of the notice. Press the **Process Monitor** link near the bottom of the page.

Template Contents					
*NOIA Report Template:	AUC_NOIA_1		Q *View Summary By:	Header V	Signatory Contact(s)
Add Attachment					Notification Comments
Preview NOIA	Sen	d NOIA	Process Monitor	1	

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

~ Proce	ess List										
	Q							K	< 1-1 of 1	$\checkmark$ > >	View All
Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
	44856805		2024-02-22- 08.43.23.000000	Application Engine	AUC_NOIA		02/22/2024 8:43:23AM CST	Success	Posted	Details	∼Actions

5. Here's a sample NOIA preview.

	otice of Intent to Award	
AMENDMENT #1. Ergotron	t: 2000015240-Sit/Stand Workstations Norklist S- Dual Sit/Stand Workstations or approved 0 02/22/2024 nounces its intent to Award to the following applicant	
RHEMA SYSTEMS INC UNIQUE SOFTWARE CORP	7275.00 USD 1625.00 USD	87.50% 12.50%

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

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## 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**.

- 1. On the Define Event Basics of the Event Creation page, select Event Settings and Options.
- 2. On the Event Settings and Options page, check the Allow Send NOA Notification box.

ſ	Notification to be Sent	Only Responded Bidders	~		Award Only after Notice End	
		Allow Send NOA Notification		*Award Template	AUC_NOA_1	Q
	Notification To be Sent	Only Awarded Bidders	~	*Non-Award Template	AUC_NONA_1	Q

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

NOTE: the Status of the event must be "Awarded."

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

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.
WorkCenter	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 Award** icon for that event.

Sea	rch Results	3					Q	<	< 1-25 of	529 🗸 >	>    View 100
	Event ID 000015286	Name 10 line upload tes	Format Buy	<b>Type</b> RFx	Unit	Origin Status		<b>·</b>	1 🙀	G,	e dix
▶ 2	000015284	More notifications	Buy	RFx		A17 Awarded		<b>y</b>	1 🔍	S.	Rotice of Awar

#### 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.
  - a. Update the Notifications to be Sent selection if needed.
  - b. You can add attachments or comments to the notice.
  - c. SWIFT also sends a Notice of Non Award (NONA) to bidders not selected for an award.
  - d. You can preview the NOA.
  - e. Save it.

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

Business Event Typ Event For	99:	G1001 RFx Buy	Event ID: Event Roun Currency:	2000015240 d: 1 USD		Event Version:	Sit/Stand Workstations 2 01/26/2024 9:51AM	CST	NOA Status: Event Status:	Not Sent Awarded		
Notification to be Sent O All Bidders			Only Awarded Bidders			Only Non-Awarded Bidders Osp		Specific Biddera				
	Bidder Details											1-1 of 1 ♥ > >    Viet
		Select	Name	Bidder Setid	Bidder ID	Bidder Type	Bidder Location	Contact	Responded	Awarded	Email ID	Notification
	1	8	RHEMA SYSTEMS INC	SHARE	0001035000	Supplier	001	1	No	Yes	Swift.Testing@state.mn.us	Preview
Ter	Template Contents           *Award Template:         AUC_NOA_1         Q         Signatory Contact(s)           *Non-Award Template:         AUC_NONA_1         Q         Notification Comments											
Add Attachment Send Notification Process Monitor Save Return to Search Notify												

- 3. SWIFT displays a message. Press the **OK** button.
- 4. Track the status of the notice.
  - a. Press the **Process Monitor** link. SWIFT opens up the Process Monitor page. The Process Name is "AUC\_NOA."
  - b. When the Run Status is "Success" and the Distribution Status is "Posted," SWIFT sent out the NOA email to the selected bidders.
- 5. If you selected the Preview button, SWIFT will show you an example of the Notice of Award email.

	ΝΕΣΟΤΑ	Notic	Notice of Award								
Bid Event: 2000015240-Sit/Stand Workstations AMENDMENT #1. Ergotron Worklist S- Dual Sit/Stand Workstations or approved equal 02/22/2024											
RHEMA SYSTEMS INC 2395 FAIRVIEW AVE N ROSEVILLE MN 55113											
RHEMA SYSTEMS INC,											
Minnesota Management & Budget is pleased to award RHEMA SYSTEMS INC the following:											
	Event ID:       2000015240 Round 1 Version 2         Name:       Sit/Stand Workstations         Award type:       Purchase Order										
	Description Ergotron Workfit S- Workstation OR Ap Workstation Install	proved Equal	<u>Qty</u> 7.5	Unit Price 570.00	Award Total 4275.00 3000.00	Currency USD					

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