

## QUICK REFERENCE GUIDE

Updated January 15, 2021

### Create an Event from a Requisition

This Quick Reference Guide explains how to create an event from a requisition. When agencies plan to purchase goods that costs more than \$10,000, they may need create a requisition to pre-encumber the funds. After creating a requisition for this purpose, SWIFT will allow you to copy it into the Strategic Sourcing (SS) module while creating an event.

**Note:** Events created from requisitions can be awarded only via purchase orders.

- To create an event from a requisition, use the Open Market Requisition (OMR) document type.
- Once you create an event by copying a requisition, that requisition is no longer available for further processing in SWIFT.
- Requisitions or requisition lines copied into events can be amount-based or quantity-based.
- You can also copy lines from multiple requisitions into an event. For each requisition line copied, SWIFT will create a separate line on the event. However, if one requisition line description is identical to another, SWIFT will create a single line with the combined requested quantity.

#### Steps to complete

- Step 1: Create a requisition in the EProcurement module.
- Step 2: Create a new event in the Strategic Sourcing module.
- Step 3: Add the event to SWIFT.
- Step 4: Copy line item information from the requisition on to the event.
- Step 5: Save the line item information.

#### Step 1: Create a requisition in EProcurement.

1. Create an OMR requisition in the EProcurement (EPro) module.  
See [Create an Open Market Requisition Quick Reference Guide](#) for more details.
2. After creating an OMR requisition, make sure the *Confirmation* page shows the following statuses for the requisition:
  - The *Status* field must have an “Approved” status.
  - The *Budget Status* field must have a “Valid” status.

**Confirmation**

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Your requisition has been submitted.

Requested For		Number of Lines	1
Requisition Name	1000000004	Total Amount	100.00 USD
Requisition ID	1000000004	Pre-Encumbrance Balance	100.00 USD
Business Unit	G1001		
Status	Approved		
Priority	Medium		
Budget Status	Valid		

## Step 2: Create a new event in the Strategic Sourcing module.

1. Navigate to the *Create Events* page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event. The <i>Create Events</i> page will display by default.

2. On the *Add a New Value* tab, enter information in the following fields.

Header Field	Field Description
<b>Business Unit</b>	Your agency number <i>Example: G1001 for MMB</i>
<b>Origin</b>	Your division number <i>Example: 509 for Accounting Services</i>
<b>Event Format</b>	Buy (Used to create Request for Bid, or RFB, and Request for Purchase, or RFP) RFI (Used to create a Request for Information, or RFI)
<b>Event Type</b>	RFx (default setting to "Request For ..." – do not use Auction)

### Create Events

Find an Existing Value
Keyword Search
Add a New Value

Business Unit

Origin

Event ID

Event Round

Event Version

Event Format

Event Type

Proxy Bidding (Auctions Only)

Add

### Step 3: Add the event to SWIFT.

1. Press the **Add** button.
2. The *Event Summary* page will display. Enter information in the following header fields.

Header Field	Field Description
<b>Procurement Type</b>	The type of procurement <i>Example: ALP RFB (Authority for Local Purchase – Request for Bid)</i>
<b>Event Name</b>	The name of the event <i>Example: MMB RFB Conference Room Chair</i>
<b>Description</b>	Detailed description of the event.  <i>Example:</i> <i>MMB RFB MityLite Tables &amp; Chairs. This event is for MityLite Tables and Chairs. See the line items for specifications or any approved equal substitutes.</i>  <i>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.</i>

	<p><i>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.</i></p> <p><i>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.</i></p> <p><i>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.</i></p> <p><i>Thank you for your interest and participation.</i></p> <p><i>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.</i></p>
<p><b>Preview Date</b></p>	<p>Date when bidders will be able to preview the event on the Supplier Portal</p> <p><b>Note:</b> The Office of State Procurement recommends always keeping the Preview Date and the Start Date as the same date. <i>Example: Current Date</i></p>
<p><b>Start Date</b></p>	<p>Date when bidders will be able to submit bids for the event on the Supplier Portal</p> <p><b>Note:</b> The Office of State Procurement recommends always keeping the Preview Date and the Start Date as the same date. <i>Example: Current Date</i></p>
<p><b>End Date</b></p>	<p>Date when the event will close on SWIFT and no longer be open for bidding.</p> <p><b>Note:</b> The End Date defaults to seven calendar days after the Preview Date and Start Date; however, you may need to extend that date for a longer period, depending on ALP requirements</p>

3. In the *Copy From* field, select “Requisition” from the drop-down list.
4. Press the **Go** button.

Create an Event

**Event Summary**

Business Unit G1001    Event ID NEXT    Round 1    Version 1    Event Format Buy

Origin 509    Accounting Services

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Event Type RFX    [Change to Auction](#)

Event Status Open

Time Zone CDT

\*Procurement Type ALP RFB

\*Event Name MMB RFB Conference Room Chair

Description must register as suppliers before being awarded an event. Make sure that the registration occurs prior to the notice of intent to award.

Preview Date 10/31/2020    Time 12:41PM

Start Date 10/31/2020    Time 12:41PM

End Date 11/07/2020    Time 12:41PM

Copy Requisition

From

**Go**

## Step 4: Copy requisition lines on to the event.

1. The *Enter Copy Criteria* page will display. Enter the following information in the *Copy Template*, *Select Criteria*, and *Copy Criteria* sections:

Field	Field Information
<b>Copy From</b>	Make sure "Requisition" is selected.
<b>Business Unit</b>	Enter the agency number for the event. <i>Example: G1001 for MMB</i>
<b>Copy Method</b>	Select "Append" to add copied lines and bid factors to existing lines of the event. Select "Override" to replace any existing lines and bid factors with copied information.
<b>Select Lines</b>	Select the "Req Lines."
<b>Requisition ID</b>	Enter the identification number for the requisition. <b>Note:</b> If you use the Look Up Glass to search for requisitions, only requisitions with an available Source Status (those not yet sourced to an event) will appear in the returned results.

2. Press the **Search** button.

3. The *Requisition Lines to Copy* page will display. Check mark the **Sel** box to select a line to copy.

4. Press the **OK** button.

Sel	Item SetID	Item	Description	Quantity	UOM	Price	Currency	Due Date	Busin
<input checked="" type="checkbox"/>	SHARE		Requisition Test for SS Event	1.0000	EA	100.00000	USD	10/30/2020	G100

5. The *Line Items* page will display. Verify all the details on the *Basic Definition* tab and *Advanced Definition* tab are correct, and then select the *Return to Event Overview* link.

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Requisition Test for SS Event	21152000	EA	1.0000	100.0000	\$100.00	0.00000

## Step 5: Save line item information.

1. Scroll down, and press the **Save Event** button.
2. SWIFT will generate an identification number for the event, which will appear toward the top in the *Event ID* field. Make sure to identify this identification number.

### Create an Event

#### Event Summary

Business Unit G1001 **Event ID 2000011210** Round 1 Version 1 Event Format Buy

Origin 509 Accounting Services

Event Type RFX [Change to Auction](#)

Event Status Open Time Zone CDT

\*Procurement Type ALP RFB

\*Event Name MMB RFB Conference Room Chair

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.

Preview Date 10/31/2020 Time 12:41PM

Start Date 10/31/2020 Time 12:41PM

End Date 11/07/2020 Time 12:41PM

Copy Requisition From

Required fields reside on pages marked with an asterisk (\*) -- you may not save your event until all required fields are filled.

#### 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

#### Step 2: Configure Line Items

Create line listings for this event.

- \* Line Items
- Item Line Defaults

#### Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

- \* Bidder Invitations

#### Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

- Event Collaborators

#### 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.

Congrats, you created an event from a requisition. To complete the remaining processing steps for the event, you will need to define the event basics, invite bidders to the event, and post the event. See the [Create an Event Quick Reference Guide](#) for instructions on how to complete these steps.