

QUICK REFERENCE GUIDE

Collaborating on Events within SWIFT

January 2, 2013

Basics

Collaboration is a method for the event creator to solicit feedback within SWIFT on an event from one or more individuals. Collaborators must first be given the Event Collaboration security role within SWIFT. When an event is created, the event creator selects one or more collaborators and specifies a collaboration time period.

Collaborators receive a notification that they have been requested to participate in event collaboration; then they access SWIFT, check out the event, review and update the event as appropriate and then check it in to send the event back to the event creator or on to the next collaborator.

Once the collaboration is done, SWIFT will notify the event creator by email and worklist entry. All of the feedback provided by the collaborators is recorded and SWIFT will present the collaboration feedback in a forum for the event creator to review and apply as necessary.

Requirements

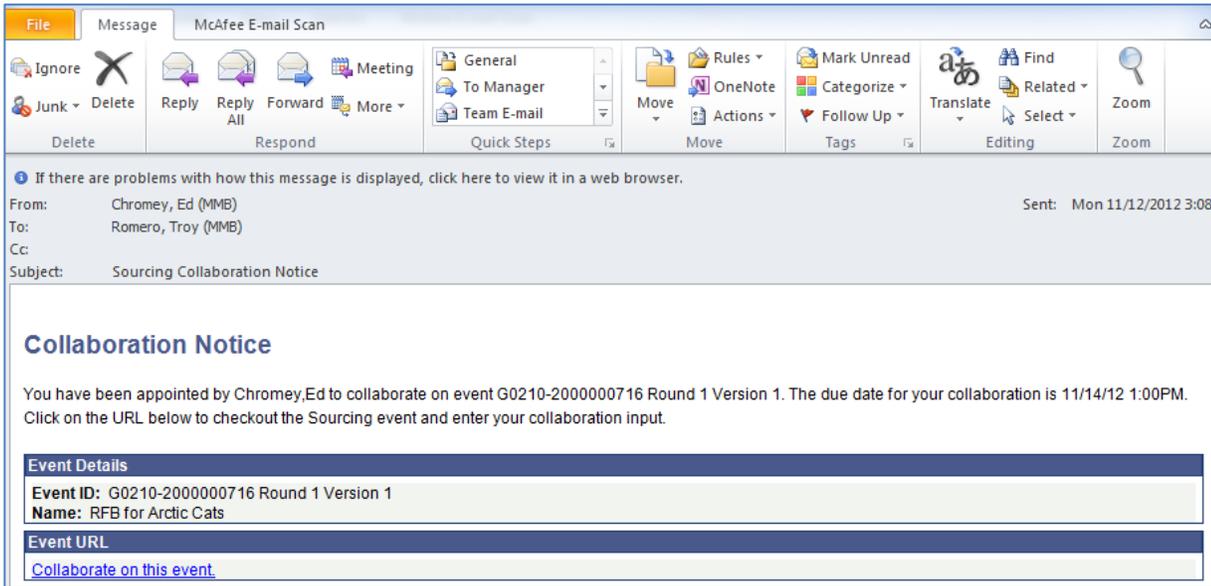
1. Potential collaborators must have the Event Collaborator role
2. Individual must be invited to collaborate on a specific event
3. Collaboration must be completed before the time period has expired

Steps to Collaborate

- Receive Notification to participate
- Check Out Event
- Collaborate on Event
- Check in Event

Step 1: Receive Notification to participate

Collaborators will be notified of an invitation to collaborate via an email notification. The notification email will include basic information about the event as well as a link to access it located at the bottom.



Step 2: Check Out Event

There are two methods for accessing the event after receiving a collaboration notification. Either method is acceptable.

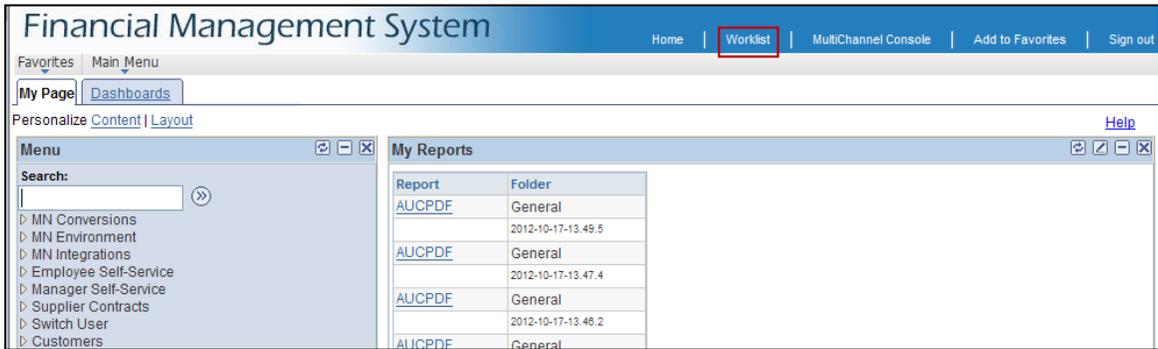
- Method 1: Use the link located at the bottom of the Collaboration Notice email
- Method 2: Access the Event via your worklist

Method 1: Accessing the Event via Email

1. Log into SWIFT
2. Click the link labeled **Collaborate on this event** via the email received
3. Proceed to step 5

Method 2: Accessing the Event via Worklist

1. Log into SWIFT
2. Click the link labeled **Worklist** located in the upper portion of the SWIFT home page

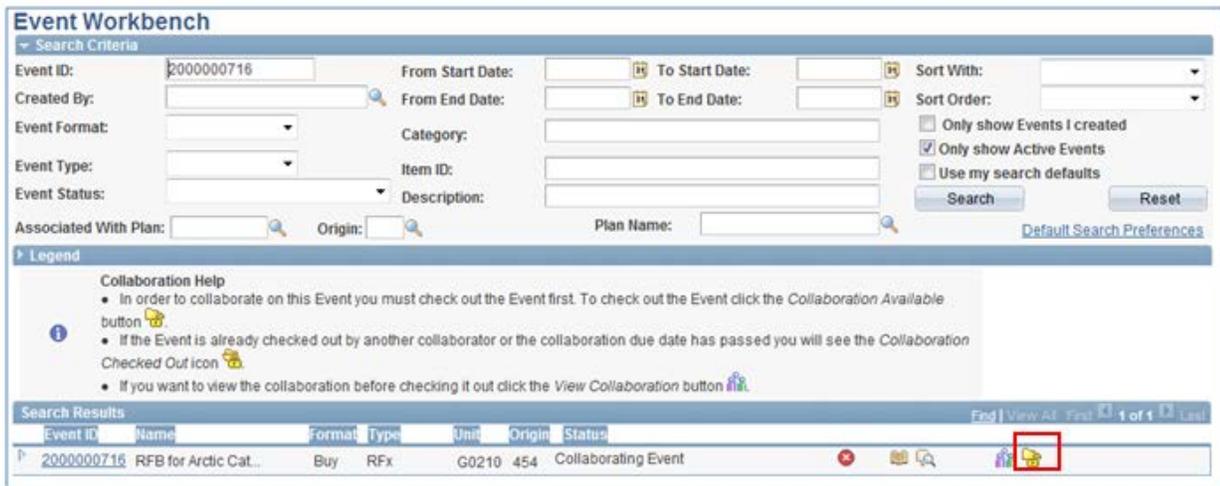


3. Locate the specific document on which you are collaborating
 - a. *From*: Individual that invited you to collaborate
 - b. *Date From*: Date that the invite was sent
 - c. *Work Item*: Checkout Event Collaboration
 - d. *Worked by Activity*: Strategic Sourcing Collaboration
 - e. *Priority*: Importance assigned by you in order to prioritize your list
 - f. *Link*: Click to access the Collaboration page for the document
4. Click the *hyperlink* located in the link column for the event you wish to collaborate on



The **Event Workbench** page will appear.

5. Click the **Available for Checkout** icon 



- ii. If unchecked, responders may submit a response without providing a price and/or quantity for one or more lines
- iii. This option can also be selected by individual lines
- c. Multiple Bids Allowed**
 - i. If checked, bidders can submit multiple, simultaneous bids (also known as alternative bids)
 - ii. If unchecked, bidders can only submit one bid on an event
 - Note:** Vendors can cancel and reenter their bid as long as the event end date has not been reached even if multiple bids are not allowed.
- d. Allow Edit of Posted Bids**
 - i. If checked, vendors can change an existing bid after it has been submitted
 - ii. Changes are only allowed before the end date and time of the event
- e. Do Not Use Best Bids on New Rounds**
 - i. Defaults as unchecked
 - ii. If checked, the best bids will be shown in negotiation rounds
 - 1. Responders will see the best bid dollar amount in new round
 - iii. Rounds are only used on RFP events
- f. Display Bid Factor Ideal Value**
 - i. If checked, the ideal response indicated for a particular bid factor will display to the vendor
 - ii. If unchecked, the ideal response will not be viewable to the vendor, even if the ideal response is required
- g. Display Bid Factor Best/Worst**
 - i. If checked, bid factors with a date, monetary, or numeric response will display the best and worst values as indicated in the bid factor set-up
 - ii. State guidelines generally prefer this to not be displayed, however, individual agencies can choose to display if necessary
- h. Round\Version Display**
 - i. Display Round
 - 1. Display only the current round of an event to vendors
 - ii. Display Round and Version
 - 1. Defaults to this option and this is the preferred setting
 - 2. Displays both the current round and the current version of the event to vendors
 - iii. Do Not Display
 - 1. Neither the current round, nor the current version displays to vendors
- i. Sealed Event**
 - i. If checked, state employees cannot view responder's response until the end date and time is reached
- j. Category**
 - i. UNSPSC codes that this event pertains to
 - ii. Used to determine workflow (approval) routing and vendor event notification

- iii. If an IT category is used, it must be listed here to ensure correct workflow routing
 - iv. Used to send interest notification email if the event is public
4. Click the **Return to Event Overview** link located at the bottom of the page

Modify an Event

Event Settings and Options

Business Unit: G0210 Event ID: 2000000716 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Create PDF on Event Post

Allow Bidder XML Downloads

Bid Required On All Lines

Multiple Bids Allowed

Allow Edit of Posted Bids

Do Not Use Best Bids on New Rounds

Display Bid Factor Ideal Value

Display Bid Factor Best/Worst

Round/Version Display: Display Round and Version

Sealed Event

Display Bid Factor Weightings

Factor Event Score Into: Total Score

Header Weighting:

Line Factor Weighting:

Start Price: Do Not Display

Bidders May Create Line Groups

Allow Price Breaks with Groups

Associated Categories			Customize Find
Category ID	Category	Description	
00854	25101903	Snowmobiles or snow scooter >	+ -

GoTo:

[< Return to Event Overview](#)

5. Click the **Payment Terms and Contact Info** link

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](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

The **Event Contact Details** page appears. This page is used to identify the currency and contact information for the event. Only a few of the fields on this page are used.

6. Review the event contact details and update as necessary
- Note:** Only the fields that should be reviewed are listed. Ignore all others not mentioned.
- a. Bill Addr
 - i. SWIFT code for address invoice should be sent to
 - ii. This will not be visible by the vendor/responder but carries forward to the contract and PO (where it can be changed if necessary)
 - b. Buyer

- i. Individual responsible for the event within SWIFT
 - ii. Not visible by the vendor/responder
- c. Contact Name
 - i. Visible to vendor/responder
 - ii. Individual responsible for assisting vendors with any issues or problems
- d. Email ID
 - i. Visible to vendors/responders
 - ii. Contact email for vendors to utilize
- e. Phone
 - i. Visible to vendors/responders
 - ii. Contact phone for vendors to utilize
- f. Fax Number
 - i. Visible to vendors/responders
 - ii. Contact fax for vendors to utilize
- g. View Address
 - i. Visible to vendors/responders
 - ii. Contact address for vendors to utilize

7. Click the *Return to Event Overview* link

Event Contact Details

Payment & Currency Information

Currency:	USD	Exchange Rate	Rate Type:	CRRNT	Origin:	102
Pay Method:			Rate Date:	11/07/2012		
Payment Terms:			<input type="checkbox"/>	Allow bids in other currencies		
Bill Addr:	B040001		<input type="checkbox"/>	Tax Exempt		
Buyer:	FICHR02		Exempt ID:			

Event Contact

Contact Name:	Chromey,Ed	View Address
Email ID:	ed.chromey@state.mn.us	
Phone:	651/259-3689	
Fax Number:		

[< Return to Event Overview](#)

8. Click the *Event Comments and Attachments* Link

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	Payment Terms and Contact Info Event Constraints
--	---

The **Event Comments and Attachments** page appears. This page is used to add any needed documents to the event, or to communicate any needed information to the vendors or to store as part of the event record.

- 9. Review the header comments and update as necessary
 - Note:** Only the fields that should be reviewed are listed. Ignore all others not mentioned.
 - a. Comments

- i. Used to communicate information to the vendor (external comments)
 - ii. Used to record information about the event (internal comments)
 - iii. Use the Scroll arrows First 1 of 2 Last to navigate to see additional comments
 - iv. It is recommended to include a comment if there is an attachment for vendors/responders to communicate what should be done with the attachment
 - b. Send to Bidder
 - i. Determines if the comment is viewable to vendors\responders.
 - ii. If checked, comment is external
 - iii. If unchecked, comment is internal
- 10. Review the header attachments and update as necessary
 - a. Attachment Description
 - v. Description of attachment
 - b. Display to Bidder
 - i. If checked, Vendors\Responders will be able to see and download the attachment
 - ii. If unchecked, attachment is internal only
 - c. Include in Notifications
 - i. If checked, all email notifications and invites to potential vendors and responders will contain the attachment
 - ii. If not checked, vendors/responders must view the attachment through the eSupplier Portal
- 11. Click the **OK** button to save your changes and return.

Financial Management System Home | Print | Worklist

Favorites | Main Menu > Worklist > Worklist

Modify an Event

Event Header Comments and Attachments

Event ID: 2000000716

Enter Comments View All First 1 of 1 Last

Comments: + -

The attached RFB document provides all of the details related to this RFB.

Send To Bidder Include On Award [Standard Comments](#)

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
RFB_Details.docx	RFB Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="View"/> -

- 12. Click the *Event Header Bid Factors* link to view questions that will be asked of the vendors\responders or state employees during the evaluation phase (if applicable).

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](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

The **Event Header Bid Factors** page appears. This page is used to view questions that will be asked of the vendors\responders or state employees during the evaluation phase (if applicable).

13. Review the event bid factors and update as necessary

Note: Only the fields that should be reviewed are listed. Ignore all others not mentioned.

- a. Seq Nbr
 - i. Order number of the question
- b. Bid Factor
 - i. Internal title of the question
- c. Type
 - i. The type of response requested
 1. Attachment: Responder must attach a document
 2. Date: Responder must provide a date
 3. List: Responder must select one or more options from a provided list
 4. Monetary: Responder must provide a monetary value
 5. Numeric: Responder must provide a number
 6. Separator: No response is required for this; it acts as a divider between other bid factors
 7. Text: Responder must input text in a free text field
 8. Yes/No: Responder must respond by selecting "Yes" or "No"
- d. Question
 - i. The question being asked
- e. Yes/No
 - i. Represents the Ideal response for the question
 - ii. Ideal response should only be provided for date, monetary, numeric, and yes/no bid factor types
- f. Display Bid Factor?
 - i. If checked, the questions will be asked of the vendors\responders
 - ii. If unchecked, the question will be an internal question used during the evaluation phase
- g. Bid Factor Response Required
 - i. If checked the vendor\responder must provide a response to this question before the bid can be submitted
- h. Ideal Response Required
 - i. If checked, vendor\responder response must match the Ideal response otherwise their response will be disqualified

14. Click the **Save Event Changes** button to save your work

15. Click the *Return to Event Overview* link.

Modify an Event

Event Bid Factors

Event ID: 2000000716 Bid Factor Weighting Total: 0.00000
 Event Name: RFB for Arctic Cats Remaining Bid Factor Weight: 100.00000

Bid Factors

Seq Nbr: 1 *Bid Factor: AMPABQ Type: Yes/No Weighting: 0.00000

Question: Do you accept all the General Terms and Conditions stated in the event details? If no, detail all exceptions.

Yes/No: Yes No

Display Bid Factor?
 Bid Factor Response Required
 Ideal Response Required
 Include on Contract

[Add Clauses To Bid Factor](#)

Select for deletion

Seq Nbr: 2 *Bid Factor: AMPABS Type: Yes/No Weighting: 0.00000

Question: Do you accept all the Special Terms and Conditions stated in the Event Details? If no, detail all exceptions.

Yes/No: Yes No

Display Bid Factor?
 Bid Factor Response Required
 Ideal Response Required
 Include on Contract

[Add Clauses To Bid Factor](#)

Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#) [Delete Selected Records](#)

Bid Factor Weighting Total: 0.00000 Remaining Bid Factor Weight: 100.00000

[Save Event Changes](#) GoTo: [Go](#)

[Return to Event Overview](#) [Return to Search](#) [Add](#) [Update/Display](#)

16. Click the *Line Items* link to review the line items.

Step 2: Configure Line Items
 Create line listings for this event.

[* Line Items](#) Item Line Defaults

The **Line Items** page appears. The line items are what will be awarded and will become either the Purchase Order or the Contract. An RFI does not contain lines.

17. Review the line details and update as necessary

Note: Only the fields that should be reviewed are listed. Ignore all others not mentioned.

- a. Description
 - i. Viewable to vendors\responders
 - ii. Specifications of goods/services for which the event is being created
- b. Category
 - i. UNSPSC Code for the specific line.

- c. UOM
 - i. Unit of Measure appropriate for the line
 - ii. Viewable to vendors\responders
 - iii. Will be “EA” and disabled if a price schedule was indicated by event creator.
- d. Qty
 - i. Quantity being requested
 - ii. Viewable to vendors\responders
 - iii. Will be “1” and disabled if a price schedule was indicated by event creator
- e. Start Price
 - i. Estimated price of the line
 - ii. Pre encumbered amount if from a requisition
 - iii. Will be .01 and disabled if a price schedule was indicated by event creator

Note: This price is NOT viewable to vendors\responders.

Modify an Event

Line Items

Business Unit: G0210 Event ID: 2000000716 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View: All Lines and Groups

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Arctic Cats Snow Mobile	25101903	EA	10.0000	1250.0000	\$12,500.00	0.00000
2		Arctic Cat Parts	25101903	EA	1.0000	0.0100	\$0.01	0.00000

Event Total: 12500.0100 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group:

[< Return to Event Overview](#) GoTo:

18. Click the *Advanced Definition* tab.

The *Advanced Definition* tab is displayed. This tab is used to indicate additional information about the line.

19. Review and/or update fields as necessary

- a. Price Schedule
 - i. If checked, a price schedule was uploaded by the Event Creator
 - Note:** This option cannot be changed. If the price schedule option should not be used, the line must be deleted and a new one added to replace it, the checkbox cannot be unchecked
- b. Comments
 - i. Click the comments icon  to view comments or attachments about the line
 - 1. The comments page functions the same way as the header level comments page, see step 15 for additional details
 - 2. If the *Price Schedule* box was checked, an attachment is required for the line
 - ii. If no comments or attachments are included on the line, the icon will be empty 

20. Click the *Details* link

Modify an Event

Line Items

Business Unit: G0210 Event ID: 200000716 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View: All Lines and Groups

Line Items Customize | Find | View All | First | 1-2 of 2 | Last

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints	Price Schedule		
<input type="checkbox"/> 1	<input type="text"/>	Arctic Cats Snow Mobile	SHARE	.	Details	Bid Factors	No	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/> 2	<input type="text"/>	Arctic Cat Parts	SHARE	.	Details	Bid Factors	No	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Event Total: 12500.0100 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group:

[Return to Event Overview](#) GoTo:

The **Line Details** page for the selected line is displayed. This page is used to set additional details for the line.

21. Review the event line details and update as necessary

Note: Only the fields that should be reviewed are listed. Ignore all others not mentioned.

- a. Item Biddable Only if Grouped
 - i. Item can only be bid on as part of a group, not individually
 - ii. Groups are indicated on previous page
- b. Physical Nature
 - i. "Physical Goods" for goods
 - ii. "Intangible/Services" for services
- c. Shipping Information

Note: Information in this section is viewable to bidders and will transfer to the contract and PO as schedules. If necessary, values can be changed on the contract or PO

 - i. *Quantity*: Quantity of line being shipped to specified location
 - ii. *Due Date*: Desired due date
 - iii. *Freight Terms*: Desired freight terms
 - iv. *Ship Via*: Desired shipment method
 - v. *Ship To*: Enter selected Ship To location
- d. Bid Parameters
 - i. *Bid Required*: If checked, vendors must respond to this line
 - ii. *Bid Quantity Rule*: Used to control quantity response of bids
 1. "Requested Quantity Required": Bidders must submit bid for the quantity specified only
 2. "Allow Extra Quantity to be Bid": Bidders can submit bids above the quantity specified up to the maximum bid quantity
 3. "Bid up to Maximum Quantity": Bidders can submit bids up to the maximum quantity for the line
 4. "Quantity Not applicable": Use for non-item lines when a dollar amount, but no quantity is required
 - a. The quantity of the line is one
 - b. If the line was copied from an amount only requisition line, this will be the default value and cannot be changed
 - iii. Minimum Quantity
 1. Used with bid quantity rule

2. The minimum quantity on which the bidder can bid
 - iv. Maximum Quantity
 1. Used with bid quantity rule
 2. The maximum quantity on which the bidder can bid
 3. This quantity can be larger than the line quantity if “Allow Extra Quantity to be Bid” is selected in the Bid Quantity Rule
 - v. Alternate UOM
 1. Used only with RFPs
 2. Select one these values to indicate if bidders may bid on line items using alternate units of measure
 - a. “Any UOM” (any unit of measure): Bidders can select any existing unit of measure
 - b. “Not Allowed”: Bidders must bid using the specified line unit of measure; this is the default value
 - c. “Only existing item/uom’s”: Bidders can select from a list of existing item and unit of measure relationships defined in the system.
 - e. Click **Next** or **Previous** buttons to move to additional lines
22. Click *Return to Event Overview* to return to line Basic Definition tab

Create an Event

Line Details

GoTo Line: Next Previous

Event ID: NEXT Requested Quantity: 10.0000
 Line: 1 Start Price: 2000.0000
 Item ID: Physical Nature:

Description: test
 Item Biddable Only if Grouped

Shipping Information Find View All First 1 of 1 Last

Schedule: 1 + -
 Quantity: Due Date: Freight Terms:
 Ship Via: Ship To: Ship From:

Bid Parameters

Bid Required
 Reserve Price: Min Quantity: Max Quantity:
 Bid Quantity Rule:
 Alternate UOM:
 User Defined Price Breaks Bidder Defined Price Breaks

Item Specification
Line Image

[< Return to Event Overview](#)

Add Update/Display

23. Click the *Bid Factors* link

Modify an Event

Line Items

Business Unit: G0210 Event ID: 2000000716 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View: All Lines and Groups

Line Items Customize | Find | View All | First 1-2 of 2 Last

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints	Price Schedule		
1		Arctic Cats Snow Mobile	SHARE	.	Details	Bid Factors	No	<input type="checkbox"/>		<input type="button" value="+"/> <input type="button" value="-"/>
2		Arctic Cat Parts	SHARE	.	Details	Bid Factors	No	<input checked="" type="checkbox"/>		<input type="button" value="+"/> <input type="button" value="-"/>

Event Total: 12500.0100 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group:

[Return to Event Overview](#) GoTo:

The *Line Bid Factors* page appears for the selected line. The line bid factors ask specific questions about the line, and are set up the same as the header level bid factors.

24. Review the bid factors and update as necessary

Note: Only the fields that should be reviewed are listed. Ignore all others not mentioned.

- a. Seq Nbr
 - i. Order number of the question
- b. Bid Factor
 - i. Internal title of the question
- c. Type
 - i. The type of response requested
 1. Attachment: Responder must attach a document
 2. Date: Responder must provide a date
 3. List: Responder must select one or more options from a provided list
 4. Monetary: Responder must provide a monetary value
 5. Numeric: Responder must provide a number
 6. Separator: No response is required for this; it acts as a divider between other bid factors
 7. Text: Responder must input text in a free text field
 8. Yes/No: Responder must respond by selecting "Yes" or "No"
- d. Question
 - i. The question being asked
- e. Yes/No
 - i. Represents the Ideal response for the question
 - ii. Ideal response should only be provided for date, monetary, numeric, and yes/no bid factor types
- f. Display Bid Factor?
 - i. If checked, the questions will be asked of the vendors\responders
 - ii. If unchecked, the question will be an internal question used during the evaluation phase
- g. Bid Factor Response Required
 - i. If checked the vendor\responder must provide a response to this question before the bid can be submitted
- h. Ideal Response Required

- i. If checked, vendor\responder response must match the Ideal response otherwise their response will be disqualified
- 25. Click the **Save Event Changes** button to save your work.
- 26. Click the *Return to Event Overview* link

Modify an Event

Line Bid Factors

GoTo Line: 01 - Arctic Cats Snow Mobile Next Previous

Line: 1 Bid Factor Weighting Total: 100.00000

Item ID: Remaining Bid Factor Weight: 0.00000

Description: Arctic Cats Snow Mobile

Bid Factors

Seq Nbr:	1	Bid Factor:	PRICE	Type:	Monetary	Weighting:	<input type="text" value="100.00000"/>	+ -	
Question:	<input style="width: 100%;" type="text" value="What is the price per unit?"/>			<input checked="" type="checkbox"/> Display Bid Factor <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required <input type="checkbox"/> Include on Contract					
Best:	0.000000	Worst:	1250.000000						

[Price Components](#)

Select for deletion [Add Clauses To Bid Factor](#)

[Add Bid Factors by Group](#) [Select Bid Factors](#) Delete Selected Rows

Bid Factor Weighting Total: 100.00000 Remaining Bid Factor Weight: 0.00000

[< Return to Event Overview](#)

- 27. Click the *Bidder Invitations* link

Step 3: Select Bidders to Invite

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

[* Bidder Invitations](#)

The **Invite Bidders** page appears. This page is used to view the list of vendors\responders invited and to determine if the event is to be viewable by the public.

- 28. Review invited vendors and update as appropriate
 - Note:** Only the fields that should be reviewed are listed. Ignore all others not mentioned.
 - a. Public Event
 - i. If checked, the event will appear on the eSupplier Portal and accessible to the public
 - b. Bidder ID
 - ii. Lists all vendors invited
 - Note:** The PUBLIC_AUC Bidder ID will appear if the event is a public event.
- 29. To locate specific vendors to invite, click Search for Bidders

Create an Event

Invite Bidders

Business Unit: G0210 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Bidder Invitation List [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1 of 1](#) | [Last](#)

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method
1					Email

[Search for Bidders](#) [Dispatch Lines](#) [Save Vendors as Group](#)

 GoTo:

[< Return to Event Overview](#)

The **Bidder Search** page opens and specific vendors can be located using specific search criteria. The search page will utilize “AND” criteria when searching for existing vendors. To narrow your search, provide additional search criteria. Likewise, to expand your search, provide fewer criterions.

30. Enter the desired search information

Note: To narrow your search, provide additional search criteria. To expand your search, provide fewer criterions.

- a. *Bidder Type:* Always use “Vendor”
- b. *Name:* Vendor’s name; use the search icon if only part of the name is known
- c. *ID:* Vendor’s SWIFT ID number; use the search icon if only part of the vendor ID is known
- d. *Contact:* Vendor’s contact name
- e. *Group ID* and *Group Name:* Search based on vendors previously saved as a group
- f. *Category:* Locate vendors self selected for specific category codes
- g. *State, City, County, and Postal:* Vendor’s address information
- h. *Type, SIC Type, SIC Code, and Type of Contractor:* Not used by the State
- i. *Item ID:* Search for vendors associated with a specific Item ID
- j. *TG:* Targeted Group vendors
- k. *ED:* Economically Disadvantaged vendors
- l. *Registered:* Search for registered vendors only
 - i. Vendors who have designated they want to be considered for bids (RFBs), Proposals (RFPs), or requests for information (RFIs)
 - ii. Vendors must be registered before they are able to bid on an event
- m. *Generic Group Box*
 - i. This section allows vendors to be located based on various preference programs and federal classifications

31. Once search options are entered, click **Search** to locate vendors matching the specified criteria

Bidder Search

Search Criteria

Bidder Type: Vendor

Name:

ID:

Contact:

Group ID:

Group Name:

Category:

State:

City:

Country:

Postal:

Type:

SIC Type:

SIC Code:

Item ID:

TG ED Registered Type of Contractor

Generic Group Box

Results Option: Display Bidder/Company Id Only

Type:

Search Recommend Bidders

Maximum Rows retrieved: 50

Enter search criteria and press search to retrieve bidders.

OK Cancel

32. Locate the desired vendor(s) from the search results and click the Invite checkbox

33. Click **OK** to add the selected vendor(s)

Bidder Search

Search Criteria

Bidder Type: Vendor

Name: BLUE EARTH CITY OF

ID:

Contact:

Group ID:

Group Name:

Category:

State:

City:

Country:

Postal:

Type:

SIC Type:

SIC Code:

Item ID:

TG ED Registered Type of Contractor

Generic Group Box

Results Option: Display Bidder/Company Id Only

Type:

Search Recommend Bidders

Maximum Rows retrieved: 50

Select All Deselect All

Search Results

Bidder ID	Location	Contact Information	Bidder Company	Invite
1 0000205146	001		BLUE EARTH CITY OF D	<input type="checkbox"/>

OK Cancel

You are returned to the *Invite Bidders* page, repeat steps 30-33 to add additional vendors as needed

34. To send invitations to individuals that may or may not be a vendor with the State of Minnesota click the

Details button located to the far right of the Public line

- a. Enter Contact Name
- b. Enter Email ID
- c. Click OK

35. Click the **Save Event Changes** button to save your work

36. Click the *Return to Event Overview* link

Modify an Event

Invite Bidders

Business Unit: G0210 Event ID: 2000000716 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Select	Bidder ID	Bidder Type	Location	Name	*Dispatch Method	Invite Status
1	PUBLIC_AUC	Public	1	This is a Public Event	Email	
2	0000192550	Vendor	001	ASSOC FOR CAREER & TECH EDUC	Email	
3	0000192552	Vendor	001	FELTON TELEPHONE CO INC	Email	
4	0000192622	Vendor	001	MANKATO ELEC INC	Email	

Search for Bidders Dispatch Lines Save Vendors as Group

Save Event Changes GoTo: Go

[Return to Event Overview](#)

Step 4: Check in Event

Once you have completed your review of the event and provided any updates it is time to check in the event.

1. Click the **Route** button located at the bottom of the **Event Summary** page

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.

Save Event **Route** Save As Template Preview PDF

2. A message will appear asking if you would like to check-in the event
 - a. Click **Yes** to check in the event
 - b. Click **No** to continue with the collaboration process

Message

Routing Collaboration Event to next Collaborator will check-in the event. Do you wish to proceed? (18058,199)

If you have not finished reviewing the event, select "No", otherwise select "Yes".

Yes No

After clicking the **Yes**, the event will become read-only and is either routed to the next collaborator (if additional individuals were asked to participate by the Event Creator) or back to the event creator notifying them collaboration is complete. In either case, an email notification is sent and the event will appear in the user's Worklist.