SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

Add, Edit or Delete a Bid Factor on an Event

In the Strategic Sourcing module, bid factors are questions bidders must answer about their products, services, or company. Bid factors may exist in the header and lines of an event. There are currently several factors that default into the event header.

- The Office of State Procurement (OSP) reviewed all header bid factors. They will likely be included in a "Responders Declaration Document." This document will likely include the General Terms and Conditions, a sample contract, and any other necessary legal language.
- Event buyers will need to attach this "Responders Declaration Document" to the event.
- It is up to the event buyer if they want to pull in header bid factors. The existing list of bid factors is still available and any can be added to an event.

If you need a bid factor on an event that is not in the "Responders Declaration Document," there are several ways that you can add it to an event.

1. You can add or modify an existing bid factor from the drop down list of existing bid factors.
2. You can create an ad hoc bid factor that exists only for that individual event. It is not available for future events.
3. You can also delete any bid factors after you create them.

IMPORTANT: You can create or edit factors only before you post the initial version of an event. You can update the bid factor language after you post an event. Be careful if there are existing bidders for this updated event.

This guide provides steps to add or edit a bid factor on a new event. It also describes the steps to delete a bid factor on an existing event.

Steps to add or modify a bid factor on a new event

Step 1: Access the Event Summary page

1. Navigate to the **Add a New Value** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value page.

Navigation Options	Navigation Path
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value page.

2. On the **Add a New Value** page, enter the following information.
- Business Unit
- Origin
- Event ID should remain as "NEXT"
- Event Format should be "Buy"
- Event Type should be "RFx"

3. Press the **Add** button.

Step 2: Populate the required sections on the Event Summary page

SWIFT displays the Event Summary page.

1. Enter the required information in the header on the **Event Summary** page.
2. Enter the required information on the **Define Event Basics** section.
3. Enter the required information on the **Configure Line Items** section.
4. **Save** the event.

Step 3: Add or modify a bid factor on the header of the Event Summary page (as needed)

1. In the Define Event Basics section, select the **Event Header Bid Factors** link.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info
Event Comments and Attachments   Event Constraints
Event Header Bid Factors

2. SWIFT displays the Event Bid Factors page.
   a. To add a bid factor from the existing list on the Event Bid Factors page, use the **Look up Bid Factor** icon to find the desired bid factor.

b. **IMPORTANT.** Update the Weighting field to 100. If you add more bid factors, the total must equal 100%. You can weigh individual bid factors at 0 if the total equals 100.

c. If you want to add additional bid factors from the existing list, select the **Add a New Row** icon for each new bid factor.

3. To add an ad hoc bid factor, select the **Add a New Row** icon. Add the following information to the blank bid factor.

- **Name** the bid factor in Bid Factor field. The name is used internally only. SWIFT will not display it to bidders. This new ad hoc bid factor will not be available for future event. Do not put any spaces in the name.
- In the **Type** field, select appropriate option for the bid factor. This example shows an "Attachment" type, which requires the bidder to attach a document on their bid.
- In the **Question** section, add a question that describes the bid question for the bidder to respond to.
- Review the text boxes. Check the boxes that fit the event. This example shows a "Bid Factor Response Required."

IMPORTANT: If you have a Text type, **do not** select the "Ideal Response Required" checkbox because SWIFT will not accept any responses that are not exactly as you type them in the box.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Fields in the Event Bid Factors page. Fields marked with an asterisk (*) are required.

Field Name	Field Description
* Bid Factor Code menu	Select an item from the predefined menu.
Weighting field	All the bid factors must total 100.
Add a New Row/ Delete a Row icon	Select the plus sign (+) to add a row. Select the minus sign (-) to delete a row.
Question text box	Unlimited length field in which you can ask the bidder a question.
Spell Check icon	Select this icon to spell check the text in the Question box.
Display Bid Factor checkbox	Select this box to display the bid factor to bidders
Bid Factor Response Required checkbox	Use to indicate that a response is required for this bid factor.
Ideal Response Required checkbox	Select this box to indicate that a bidder must respond with the best or ideal response to consider their bid. If the bidder does not provide the best or ideal response for one or more bid factors, SWIFT disqualifies their bid from further consideration.
* Type menu	This field determines what bid factor fields appear on the page. Values include: **Attachment:** A file attachment is required in the response. **Date: A list of calendar dates.** **List:** A list of attributes, such as color or size. **Monetary:** A range of costs that are related to the bid factor. **Numeric:** A range of figures, such as length of service contract. **Separator:** A header bid factor that is not weighted and does not require a response from bidders. **Text:** A question requiring a text answer. **Yes/No:** A text question requiring a yes or no answer.
Best	This field appears if selected in the Event Setting and Options section.
Worst	This field appears if selected in the Event Setting and Options section.
UOM (Unit of Measure) menu	Enter a UOM for each price component.
Select for Deletion checkbox	Select this checkbox to remove the bid factor.
Delete Selected Records button	Delete records selected for deletion.

4. Edit an existing bid factor, as needed. Depending upon the bid factor, you can edit many of the fields on an existing bid factor for the event. SWIFT will not keep those changes for future events.

5. Save the changes.
   a. After you have entered the required fields, go the bottom of the page and select the **Save Event Changes** button.
   b. Then, press the **Return to Event Overview** link.

Step 4: Create a new ad hoc bid factor on the lines (as needed)

1. In the Configure Line Items section, select the **Line Items** link

2. SWIFT displays the Line Items page. In the Line Items section of the Line Items page, open the **Advance Definition** tab.

1. In the line you wish to add an ad hoc bid factor, select the **Bid Factors** link. SWIFT displays the Line Bid Factors page.

a.   SWIFT defaults in the "What is the price per unit?" bid factor. Keep this default for each line.

b.   Select the **Add a New Row** icon for each of the bid factors you wish to add in the line.

2.   SWIFT displays an open bid factor. Just like the header, there are three ways to create an ad hoc bid factor on the line in an event. Follow the instruction listed in Step 5 of this guide.

- Create your own bid ad hoc factor
- Add an existing bid factor
- Edit an existing bid factor

3.   After you entered values in the required fields, go the bottom of the page and select the **Return to Event Lines Page** link.

4.   SWIFT returns you to the Line Items page.

a.   Add any new bid factors for additional lines as needed.

b.   Go the bottom of the page and select the **Save Event Changes** button.

c.   Then, press the **Return to Event Overview** link.

Steps to delete an existing bid factor on an existing event

IMPORTANT. You cannot delete a bid factor after you post the event

Step 1: Access the event in the Event Workbench

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

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event, 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 opens the Search Results section. On the right side, select **Edit** icon, which is a pencil, for the desired event.

Step 2: Delete a bid factor in the header (as needed)

1. SWIFT displays the Event Summary page for that event. In the Define Event Basics section of the Event Summary page, select the **Event Header Bid Factors** link.
2. SWIFT displays the Event Bid Factors page. Delete an individual bid factor on the Event Bid Factors page, as needed.
   a. Select the **Delete** (-) icon on the bid factor you want to delete.
   b. Select **OK** at the warning.
   c. Then, press the **Save Event Changes** button.

3. SWIFT displays the Event Bid Factors page. Delete all bid factors as needed.
   a. If you wish to delete all the bid factors, go to the bottom right of the page. Press the **Select All** icon (box with 3 lines).
   b. Then press the **Delete Selected Records** button.

4. Save the changes you made at the header.
   a. After you have entered the required fields, go the bottom of the page and select the **Save Event Changes** button.
   b. Then, press the **Return to Event Overview** link.

5. SWIFT displays the Event Summary page. Continue to process the event.

Step 3: Delete a bid factor on the line (as needed)

1. In the Configure Line Items section of the Event Summary page, select the **Line Items** link.
2. SWIFT displays the Line Items page. Open the **Advance Definition** tab.
3. On the event line you wish to edit, select the **Bid Factors** link.

    a. Select the **Delete (-)** icon on the bid factor you want to delete.

    b. Select **OK** at the warning.

    c. Then, press the **Return to Event Line**s page link.

4. Delete all bid factors as needed.

    a. If you wish to delete all the bid factors, go to the bottom right of the page. Press the **Select All** icon (box with 3 lines) and press the **Delete Selected Records** button.

    b. After you have made your changes to each line, go the bottom of the page and select the **Return to Event Lines Page** link.

5. SWIFT returns you to the Line Items page.

    a. Go the bottom of the page and select the **Save Event Changes** button.

    b. then, press the **Return to Event Overview** link.

6. SWIFT returns you to the Event Summary page. Continue to process the event.