

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### 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.

**The way bid factors default on an event has been changed. There are currently only 2 bid factors that will 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.

- You can add or modify an existing bid factor from the drop down list of existing bid factors.
- You can create an ad hoc bid factor that exists only for that individual event. It is not available for future events.
- 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 edit a bid factor on a new event

- Step 1: Access the Event Summary page
- Step 2: Populate the required sections on the Event Summary page
- Step 3: Add a bid factor on the header of the Event Summary page (as needed)
- Step 4: Create a new ad hoc bid factor on the lines (as needed)

Steps to delete an existing bid factor on an existing event

- Step 1: Access the event in the Event Workbench
- Step 2: Delete a bid factor on the header (as needed)
- Step 3: Delete a bid factor on the line (as needed)

## Steps to add or edit a bid factor on a new event

### Step 1: Access the Event Summary page

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

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value tab.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value tab.

- 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", and *Event Type* should be "RFx".
- Press the **Add** button.

SWIFT displays the **Event Summary** page.

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

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

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

1. On 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](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Add an RFx Document](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

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

Seq Nbr 3

\*Bid Factor  Q \*Type   Weighting

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

**Event Bid Factors**

Event ID: 2000003883      Bid Factor Weighting Total: 0.00000

Event Name: FURNISH AND DELIVER 1/2 TON PICKUP TRUCKS      Remaining Bid Factor Weight: 100.00000

**Bid Factors** ?

Seq Nbr: 1

\*Bid Factor: AC\_EXT\_ACCESSI

Question: ACCESSIBILITY: Are your products/services offered in response to this solicitation in compliance with the IT Accessibility

Type: Yes/No

Weighting: 100.00

Display Bid Factor?

Bid Factor Response Required

Ideal Response Required

Include on Contract

Yes/No:  Yes  No

- To add an ad hoc bid factor, select the **Add a New Row** icon (i.e., plus sign). 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.
  - On 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.
  - On 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”.

Seq Nbr: 2

\*Bid Factor: SECURITY\_CERT

Question: Did you attach the computer security certifications for all staff who will work on this project?

Type: Attachment

Weighting: 0.00000

Display Bid Factor?

Bid Factor Response Required

Include on Contract

**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.

**Fields on the Event Bid Factors page.** Required fields are marked with an asterisk (\*).

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.

Field Name	Field Description
<b>Display Bid Factor checkbox</b>	Select this box to display the bid factor to bidders
<b>Bid Factor Response Required checkbox</b>	Use to indicate that a response is required for this bid factor.
<b>Ideal Response Required checkbox</b>	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.
<b>* Type menu</b>	This field determines what bid factor fields appear on the page. Values include: <ul style="list-style-type: none"> <li>• <b>Attachment:</b> A file attachment is required in the response.</li> <li>• <b>Date:</b> A list of calendar dates.</li> <li>• <b>List:</b> A list of attributes, such as color or size.</li> <li>• <b>Monetary:</b> A range of costs that are related to the bid factor.</li> <li>• <b>Numeric:</b> A range of figures, such as length of service contract.</li> <li>• <b>Separator:</b> A header bid factor that is not weighted and does not require a response from bidders.</li> <li>• <b>Text:</b> A question requiring a text answer.</li> <li>• <b>Yes/No:</b> A text question requiring a yes or no answer.</li> </ul>
<b>Best</b>	This field appears if selected in the Event Setting and Options section.
<b>Worst</b>	This field appears if selected in the Event Setting and Options section.
<b>UOM (Unit of Measure) menu</b>	Enter a UOM for each price component.
<b>Select for Deletion checkbox</b>	Select this checkbox to remove the bid factor.
<b>Delete Selected Records button</b>	Delete records selected for deletion.

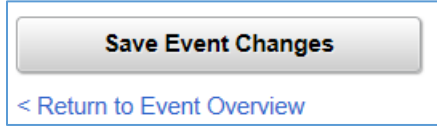
4. Edit an existing bid factor.

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.

- After you have entered the required fields, go the bottom of the page and select the **Save Event Changes** button.

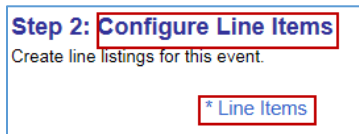
- Then, press the **Return to Event Overview** link.



SWIFT displays the **Event Summary** page.

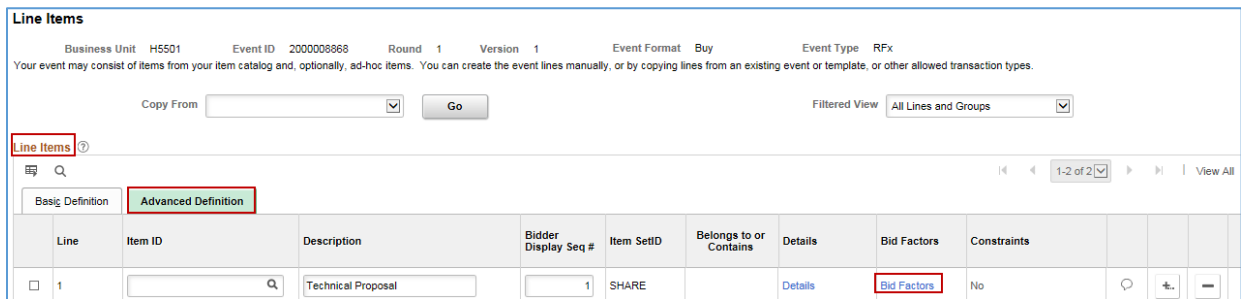
## Step 4: Create a new ad hoc bid factor on the lines (as needed)

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

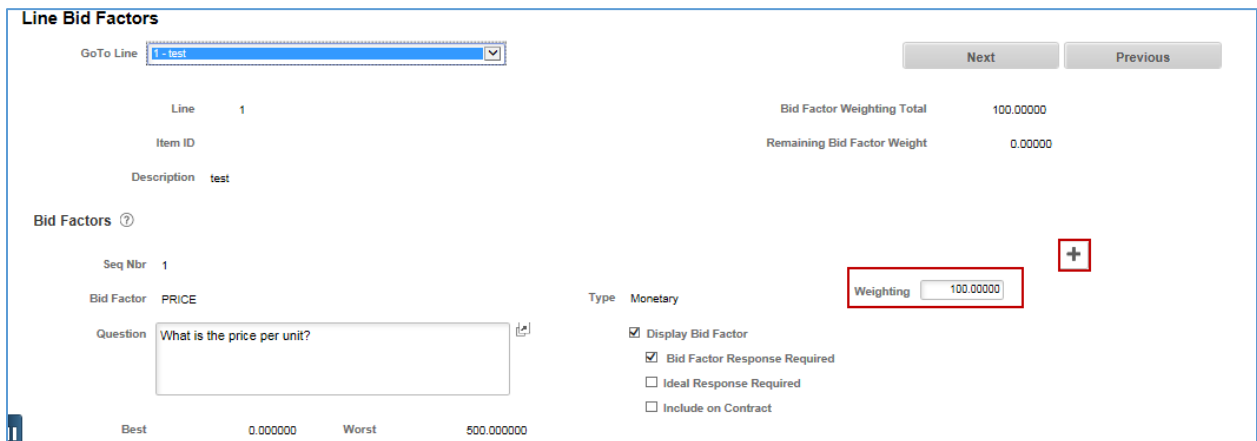


SWIFT displays the **Line Items** page.

2. On the **Line Items** section of the **Line Items** page, open the **Advance Definition** tab.



- On the line you wish to add an ad hoc bid factor, select the **Bid Factors** link. SWIFT displays the **Line Bid Factors** page.
- SWIFT defaults in the *What is the price per unit?* bid factor. Keep this default for each line.
- Select the **Add a New Row** icon (i.e., plus sign) for each of the bid factors you wish to add on the line.



- 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.

- (a) Create your own bid ad hoc factor
- (b) Add an existing bid factor
- (c) Edit an existing bid factor
- After you have entered the required fields, go the bottom of the page and select the **Return to Event Lines Page** link.

SWIFT returns you to the **Line Items** page.

- Add any new bid factors for additional lines as needed.
- Go the bottom of the page and select the **Save Event Changes** button.
- Then, press the **Return to Event Overview** link.

**You have successfully added a bid factor to a new event.**

## Steps to delete an existing bid factor on an existing event.

**NOTE:** 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
<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 opens the **Search Results** section. On the right side, select **Edit** icon (e.g., pencil) for the desired event.

SWIFT displays the **Event Summary** page for that event.

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

1. On the **Define Event Basics** section of the **Event Summary** page, select the **Event Header Bid Factors** link.

SWIFT displays the **Event Bid Factors** page.

2. Delete an individual bid factor on the **Event Bid Factors** page, as needed.

Select the (-) icon on the bid factor you want to delete. Select **OK** at the warning. Then, press the **Save Event Changes** button.

3. Delete all bid factors as needed on the **Event Bid Factors** page.

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.

4. Save the changes you made at the header.

- After you have entered the required fields, go the bottom of the page and select the **Save Event Changes** button.
- Then, press the **Return to Event Overview** link.
- SWIFT displays the **Event Summary** page. Continue to process the event.

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

1. On the **Configure Line Items** section of the **Event Summary** page, select the **Line Items** link. SWIFT displays the **Line Items** page.

2. On the **Line Items** section of the **Line Items** page, open the **Advance Definition** tab.

- On the event line you wish to edit, select the **Bid Factors** link.
- Select the (-) icon on the bid factor you want to delete. Select **OK** at the warning. Then, press the **Return to Event Lines page** link.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Seq Nbr 3

\*Bid Factor TEST\_KSB

Question Test bid factor

Type Yes/No

Weighting 0.00000

Display Bid Factor

Bid Factor Response Required

Ideal Response Required

Include on Contract

Ideal

Yes  No

Add Clauses To Bid Factor

Select for deletion

Add Bid Factors by Group Select Bid Factors Select All icon Delete Selected Rows

5. Delete all bid factors as needed.

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

SWIFT returns you to the **Line Items** page.

- Go the bottom of the page and select the **Save Event Changes** button.
- Then, press the **Return to Event Overview** link.

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

**You have successfully deleted a bid factor.**