

## QUICK REFERENCE GUIDE

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### 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.

- 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"
- Press the **Add** button.

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

SWIFT displays 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 or modify a bid factor on the header of the Event Summary page (as needed)

- 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

Event Comments and Attachments

**Event Header Bid Factors**

Payment Terms and Contact Info

Event Constraints

- SWIFT displays the Event Bid Factors page.
  - 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.

This screenshot shows the 'Look up Bid Factor' dropdown menu. The menu options are:
 

- ☒ Display Bid Factor?
- ☒ Bid Factor Response Required
- ☐ Ideal Response Required
- ☐ Include on Contract

 The form fields include: Seq Nbr (2), \*Bid Factor (searched), Question (empty), Best (0.000000), Worst (0.000000), UOM (searched), and Weighting (0.00000). There is a '+ -' icon in the top right corner.

- 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.

This screenshot shows the 'Bid Factors' list. The first bid factor is:
 

- Seq Nbr: 1
- \*Bid Factor: AC\_EXT\_EQLPAYREP
- Question: STATE OF MINNESOTA EQUAL PAY FORM CERTIFICATION:
- Type: Text
- Weighting: 0.00000
- Options: ☒ Display Bid Factor?, ☒ Bid Factor Response Required

 A purple note at the top right states: 'All Bid Factors together must equal "100.00"'. There is a '+ -' icon in the top right corner.

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.”

This screenshot shows a new bid factor being added:
 

- Seq Nbr: 2
- \*Bid Factor: SECURITY\_CERT
- Question: Did you attach the compute computer security certifications for all staff who will work on this project?
- Type: Attachment
- Weighting: 0.00000
- Options: ☒ Display Bid Factor?, ☒ Bid Factor Response Required, ☐ Include on Contract

 There is a '+ -' icon in the top right corner.

**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 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	<p>This field determines what bid factor fields appear on the page. Values include:</p> <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>
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.

Seq Nbr 5

AC\_EXT\_FREIGHT

\*Bid Factor

Question FREIGHT TERMS:

All deliveries must be FOB Destination with freight charges included in the unit price and delivered ATTN to Mary Smith. Does your price include freight?

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.

Save Event Changes

< Return to Event Overview

## 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

**Step 2: Configure Line Items**

Create line listings for this event.

\* Line Items

Item Line Defaults

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

Line Items

Basic Definition Advanced Definition

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors
1		furniture	1	SHARE		Details	Bid Factors

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.

- 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 for each of the bid factors you wish to add in 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.
  - Create your own bid ad hoc factor
  - Add an existing bid factor
  - Edit an existing bid factor
- After you entered values in 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.

## 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

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

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event, Event Workbench page.
<b>WorkCenter</b>	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Event Workbench page.

- On the Event Workbench page, enter search criteria and then select the **Search** button.
- 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.

The screenshot shows the 'Event Bid Factors' page. A modal dialog box is open in the center with the text: 'Delete current/selected rows from this page? The delete will occur when the transaction is saved.' Below the text are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a purple box. In the background, the 'Add Clauses To Bid Factor' section is visible, showing a table with columns for 'Seq Nbr', 'AC\_EXT\_FREIGHT', and 'Bid Factor'. The 'Question' field contains 'FREIGHT TERMS:'. To the right of the dialog, there are two buttons: a '+' button and a '-' button. A purple arrow points to the '-' 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.

The screenshot shows the 'Event Bid Factors' page. At the top left, there is a checkbox labeled 'Select for deletion' which is checked. Below this, there is a table with columns for 'Add Bid Factors by Group', 'Select Bid Factors', and 'Delete Selected Records'. The 'Delete Selected Records' button is highlighted with a purple box. Below the table, there is a 'Select All' button, which is also highlighted with a purple box. To the right of the 'Select All' button, there is a table with columns for 'Bid Fad', 'Total', and 'Remaining Bid Factor Weight'. The 'Total' column shows '100.00000' and the 'Remaining Bid Factor Weight' column shows '0.00000'. At the bottom left, there is a 'Save Event Changes' button, which is highlighted with a purple box. At the bottom right, there is a 'GoTo' dropdown menu and a 'Go' 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 Lines** page link.

Seq Nbr 2

\*Bid Factor AC\_EXT\_CON ORD

Question PLACING ORDERS:  
Enter the name, phone number, fax number, and e-mail address of your contact person for placing orders.

Type Text

Weighting 0.00000

☒ Display Bid Factor

☒ Bid Factor Response Required

☐ Ideal Response Required

☐ Include on Contract

Ideal

Add Clauses To Bid Factor

☐ Select for deletion

Add Bid Factors by Group

Select Bid Factors

Select All icon

Delete Selected Rows

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.