

QUICK REFERENCE GUIDE

Updated January 15, 2021

Analyze Bid Responses for an Event

This Quick Reference Guide explains how to analyze bid responses for an event in the Strategic Sourcing (SS) module in SWIFT. When analyzing and awarding events to bidders, make sure to follow Authority for Local Purchase policies, State statutes, and agency guidelines.

Note: You cannot analyze bid responses in SWIFT until the *End Date/Time* for the event passes.

Steps to complete:

- Step 1: Verify if bidders are TG/ED/VO suppliers.
- Step 2: Open the event using the Event Workbench.
- Step 3: Analyze bid responses on the *Analyze Total* and *Analyze Line* pages.
- Step 4: Complete the Event Scoring Tabulation Sheet.

Step 1: Verify if bidders are TG/ED/VO suppliers.

The Office of State Procurement (OSP) operates a program for Targeted Group (TG), Economically Disadvantaged (ED), and Veteran-Owned (VO) small businesses. According to State statute, agencies allot certified TG/ED/VO bidders a preference when analyzing bids.

How to verify if bidders are TG/ED/VO suppliers

Use the OSP Directory online

To verify if bidders are TG/ED/VO suppliers, you can use the OSP TG/ED/VO directory:

<http://www.mmd.admin.state.mn.us/process/search/>

Use the *Review Suppliers* page in SWIFT

You can also verify if bidders are TG/ED/VO in SWIFT.

1. Navigate to the *Review Suppliers* page.

| Navigation Options | Navigation Path |
|-----------------------|--|
| Navigation Collection | Accounting, Supplier, Supplier Maintenance. The <i>Review Suppliers</i> page will display by default. |

2. On the *Review Suppliers* page, enter search criteria to find the supplier—for example, *Name*, *Supplier ID*, etc.

3. Press the **Search** button.

Review Suppliers

Search Criteria

*SetID: SHARE

Name: Contains Think Great

Supplier ID: [Search]

Short Name: Equal to [Search]

Classification: [Dropdown]

Type: [Dropdown]

Persistence: [Dropdown]

Address: Equal to [Search]

City: [Search]

Country: [Search]

State: [Search]

Postal: [Search]

Bank Account #: [Search]

Max Rows: 300

Search Clear Add Supplier

4. Find the supplier in the *Search Results* below, and select the *Actions* link to open a drop-down menu for that supplier. Then select the *Maintain Supplier* link.

Search Results

Main Information Additional Supplier Info Audit Information

| Actions | SetID | Supplier ID | Supplier Name | Short Name | Address | City | State | Country |
|---|-------|-------------|-----------------|--------------|-------------|------------|-------|---------|
| <ul style="list-style-type: none"> Maintain Supplier | SHARE | 0000937693 | THINK GREAT LLC | THINK GR-001 | PO BOX 1144 | PRIOR LAKE | MN | USA |

5. The supplier information will display in a new browser tab or window. Select the *Identifying Information* tab.

Supplier

Summary **Identifying Information** Address Contacts Location

SetID: SHARE Supplier Name: THINK GREAT LLC

6. Scroll down and open the *Government Classifications* section. Then select the *View All* link to see all certifications for the supplier.

7. In the *Certification Source* field, you can see if the supplier is a certified TG/ED/VO small business.

Government Classifications

EEO Certification Date HUB Zone

Government Sources View All

Certification Source: VO-VET OWN (Veteran-owned)

Government Classifications View All

Effective Date: 06/27/2017 Certification Number

Certificate Begin Date: 06/27/2017 Certificate Expiration

Government Classification: C (Certified)

8. If the supplier is a certified TG/ED/VO small business, make sure to follow OSP policies and procedures to apply appropriate preferences during the analysis of bid responses.

Step 2: Open the event using the Event Workbench.

1. Navigate to the *Event Workbench* page.

| Navigation Options | Navigation Path |
|------------------------------|---|
| Navigation Collection | Procurement, Strategic Sourcing, Maintain Events. The <i>Event Workbench</i> page will display by default. |
| WorkCenter | Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter, left-menu, Sourcing folder, Event Workbench. |

2. On the *Event Workbench* page, enter the event identification number in the *Event ID* field.
3. Press the **Search** button.
4. The event will display in the *Search Results* section. Select the **Analyze Bids** icon for the event.
(This icon becomes available after the event's *End Date* and *Time* have passed.)

Hint: To display the "Legend" that identifies the icons on this page, open the *Legend* section.

The screenshot displays the 'Event Workbench' interface. At the top, there is a 'Search Criteria' section with various input fields: Business Unit, Event ID (2000011209), Created By, From Start/End Dates, To Start/End Dates, Event Format, Event Type, Event Status, Associated With, Origin, Category, Item ID, Description, Plan, and Name. A 'Search' button is highlighted with a red box. Below the search criteria is a 'Legend' section, also highlighted with a red box, which contains icons for various actions like Pause, Resume, Cancel, Approval Status, Event History, Analyze Bids, Notice of Intent to Award, Notice of Award, Edit Event, New Version, View Collaboration, Collaboration Available, Collaboration Checked Out, Bid History, Notify Me On Check-In, and View Award Details. A red arrow points from the 'Legend' section to the 'Analyze Bids' icon in the search results. The 'Search Results' section shows a table with columns: Event ID, Name, Format, Type, Unit, Origin, and Status. The first row contains: 2000011209, MMB RFB Conference..., Buy, RFx, G1001, 509, Event Completed.

Step 3: Analyze bid responses on the *Analyze Total* and *Analyze Line* pages.

1. The *Analyze Total* page will display for the event. In the *Analysis* section, find the information for each bid response, including the *Bidder Name*, *Bid Number*, and *Total Bid Amount*.
2. Review bidder comments and attachments by selecting the *Resp Comments/Attachments* link.

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: G1001 Origin: 509 Event ID: 2000011209 Round: 1 Version: 1 Event Name: MMB RFB Conference Room Chair

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/16/2020 12:00PM CDT Status: Pending Award

External Bid Tab Make Tabulation Public

Go To:

[Bid Analysis and Display Options](#)

Analysis

Bidder Name

Event Version Responded To: 1

Bid Number: 1

Total Bid Amount: 100.00

[Resp Comments/Attachments](#)

Total Bid Cost: 100.00

Total Event Score: 100.00

Total Header Cost: 0.00

Total Header Score: 0.00

Note: If there are multiple bidders for the event, you will need to select the *Resp Comments/Attachments* link for each one.

Analysis

| Bidder Name | ELECTRONIC IDENTIFICATION DEVICES LTD | BOBCAT OF THE COULEE REGION INC | MCDANIEL FARMS INC |
|---|---|---|---|
| Event Version Responded To | 2 | 2 | 1 |
| Bid Number | 1 | 1 | 1 |
| Total Bid Amount | 7,800.00 | 7,700.00 | 7,750.00 |
| Resp Comments/Attachments | Resp Comments/Attachments | Resp Comments/Attachments | Resp Comments/Attachments |
| Total Bid Cost | 0.00 | 0.00 | 7,750.00 |
| Total Event Score | 100.00 | 98.70 | 98.06 |
| Total Header Cost | 0.00 | 0.00 | 0.00 |
| Total Header Score | 0.00 | 0.00 | 0.00 |

- The *Response Comments/Attachments* window will display. Review the *Comments*, and open the *Attachments* by selecting the **View Attached File** icon.

Response Comments/Attachments

Event ID: 2000011209 Responder Name: [REDACTED] 0000195167

Header Comments and Attachments

Comments

1-1 of 1

Attachment Description

Bid Details

Header Factors

Comments

| Seq Nbr | Comment | Description |
|---------|---|------------------------------|
| 2 | TRN19 uploaded Bid Details on Behalf of Supplier. | Responder Declaration & Form |

Attachments

1-3 of 3

| Attachment Description | |
|--|--|
| Responder Declarations document 1 response | |
| Responder Declarations document 2 response | |
| Responder Declarations document 3 response | |

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4. Scroll down and press the **Return** button when finished.

The screenshot shows the 'Line Factors' interface. It has two main sections: 'Comments' on the left and 'Attachments' on the right. The 'Comments' section includes a search bar, a table with columns 'Line' and 'Comments', and a 'Return' button at the bottom left, which is highlighted with a red box. The 'Attachments' section includes a search bar and a table with columns 'Bid Factor Number' and 'Attachment Description'.

5. You can also analyze bid responses at the line level. Select the *Analyze Line* link to display the *Analyze Line* page, which lists line information for bids.

The screenshot shows the 'Analyze Total' page. At the top left is the title 'Analyze Total'. Below it is the text 'Analyze Total' and a link 'Analyze Line' which is highlighted with a red box. The page displays several fields: 'Business Unit: G1001', 'Origin: 509', 'Event ID: 2000011209', 'Round: 1', and 'Version: 1'. Below these are 'Event Format: Buy', 'Event Type: RFX', 'Currency: USD', and 'End Date: 10/16/2020 12:00PM CDT'. At the bottom, there is a link 'Bid Analysis and Display Options' with a question mark icon.

6. Scroll to the right, and select the *Analyze* link below the *Line Items* section to analyze the line information for the bid.

The screenshot shows the bid details page. At the top, there are fields for 'Round: 1', 'Version: 1', 'Event Name: MMB RFB Conference Room Chair', 'Currency: USD', 'End Date: 10/16/2020 12:00PM CDT', 'Status: Pending Award', and 'Go To:'. Below this is a table with columns: 'Category', 'UOM', 'Start Price', 'Requested Qty', 'Qty Awarded', 'Weighting', 'Line Status', and 'Analyze'. The 'Analyze' column for the first row contains a link 'Analyze' which is highlighted with a red box. The table also includes a 'View All' link at the top right.

- The line information will display. To review the bidder comments and attachments related to the line, select the **Line Comments and Attachments** icon for each attachment.

Analyze Line

| | | | | | |
|----------------|---|--------------------|------------------------|---------------|-------------------------------|
| Business Unit: | Origin: | Event ID: | Round: | Version: | Event Name: |
| G1001 | 509 | 2000011209 | 1 | 1 | MMB RFB Conference Room Chair |
| Event Format: | Event Type: | Currency: | End Date: | Status: | |
| Buy | RFx | USD | 10/16/2020 12:00PM CDT | Pending Award | |
| Line | 1 | Requested Quantity | 1.0000 | UOM EA | Start Price 100.00000 |
| Item ID | Item Description: Conference Room Chair | | | Weighting | 100.00000 |

Bid Analysis and Display Options

- The *Line Comments and Attachments* window will display, where you can review comments and attachments from the bidder on the line level, if any. When finished, press **OK**.

Note: If the event includes more than one line, you can press the **Next Line** button to go to the next line before pressing **OK**. If there are no comments or attachments at the line level, this window will appear blank.

- When finished reviewing all lines, press the **OK** button toward the bottom on the page.

Line Comments and Attachments
x Help

Line Comments and Attachments

Event ID 2000011209 Line Number 1

Enter Comments ? Q | | | 1 of 1 | View All

Comments: + -

Send To Bidder
 Include On Award

[Fetch Item Specs](#)
 [Standard Comments](#)

Add Attachment

OK
 Cancel

Note: Instead of reviewing the bidder comments and attachments one by one, you can download all bidder attachments at once.

- In the *Go To* field, select “Download Bidder Attachments” from the drop-down list.

Analyze Total

Analyze Total Analyze Line

Business Unit: Origin: Event ID: Round: Version: Event Name:

G1001 509 2000011209 1 1 MMB RFB Conference Room Chair

Event Format: Event Type: Currency: End Date: Status: **Go To:**

Buy RFX USD 10/16/2020 12:00PM CDT Pending Award

► **Bid Analysis and Display Options** ?

Analysis

Bidder Name

Event Version Responded To 1

Bid Number 1

External Bid Tab Make Tabulation Public

Go To:

- ...Analyze Export
- Associate Planning Task
- Award Events
- Create New Round
- Discuss Event in Forum
- Document Status Inquiry
- Download Bidder Attachments**
- Event Comments and Attachments
- Invite Collaborators
- Notice of Award
- Notice of Intent to Award
- Review Optimization

11. The *Download Bidder Attachments* window will display. Make sure the **Download All Bidder Attachments** radio button is selected, and press the **Download** button.

12. Wait a moment. When the *Download Status* field says “Success,” select the *View Attachments* link.

Analyze Total

Analyze Total Analyze Line

Download Bidder Attachments Print | Help

View Latest Download

Download Status: Success

Download Date: 10/19/2020 09:19:34 AM

Go To: **View Attachments**

Download New Attachments

Download All Bidder Attachments

Download Attachments For Selected Bidders

Return **Download**

13. When the folder of downloaded attachments opens, you can open the attachments as files. When finished reviewing the bidder comments and attachments, close the folder.

14. Back on the *Download Bidder Attachments* window, press the **Return** button.

Note: In addition to the “Download Bidder Attachments” in the *Go To* field, there are other options from the drop-down list that execute the following functions:

| Name | Description |
|------------------------------------|--|
| Analyze Events | Return to the <i>Analyze Events</i> page for the event. |
| Analyze Export | Export a document that combines bidder answers. |
| Award Events | Open the <i>Award Details</i> page for the event. |
| Create New Round | Create a new round for the event. |
| Discuss Event in Forum | Review the State of Minnesota Event Discussions page to review messages about the event. |
| Document Status Inquiry | Open the <i>Sourcing Document Status Inquiry</i> page to review associated documents for this event. |
| Download Bidder Attachments | Download all bidder attachments. |
| Event Attachments/Comments | Open <i>Event Comments and Attachments</i> window to review header level attachments and comments for the event. |
| Notice of Award | Send a Notice of Award to the winning bidder(s). |
| Notice of Intent to Award | Send an Intent to Award the event to bidders. |

Step 4: Complete the Event Scoring Tabulation Sheet.

After completing the analysis of bid responses, you may need to fill out an Event Scoring Tabulation Sheet provided by the Office of State Procurement (OSP) or your agency.

- Check with your manager about whether or not you’ll need to fill out and attach an Event Scoring Tabulation Sheet and/or other offline scoring forms to compare or document bid responses.
- The Office of State Procurement recommends the use of their Tabulation Sheet for analyzing bids for acquisition purchases: www.mmd.admin.state.mn.us/mn01020.htm.
- When you award an event to a bidder, you may need to attach forms like the Event Scoring Tabulation Sheet.