

## Overview of Changes in Strategic Sourcing

September 1, 2019

The 9.2 version of SWIFT's Strategic Sourcing module is greatly improved. You will see technical enhancements to sections of the event record that make it easier for creating, managing, and reporting on events. Changes include:

- Header
- Event Settings and Options
- Header Bid Factors
- Configure Line Items
- Invite Bidders
- Collaboration
- Approve an Event
- Award an Event
- Global Search

**Note:** There may be some changes to this information since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact us at: [SWIFT.project@state.mn.us](mailto:SWIFT.project@state.mn.us).

### Header

- Creating events is the same process for acquisitions and professional/technical events.
- The Proprietary/Trade Secret Data link is no longer used in 9.2.
- There are fewer options for the Procurement Type (e.g., "Construction" or "Conferences" are gone).
- The Estimated Price field is not used in 9.2.
- The Event End Date defaults to one week after the Preview and Start Dates. Event coordinators will need to follow the Authority for Local Purchase guidelines about the appropriate length of time these events need to be posted.

**Event Summary**

Business Unit R2901    Event ID NEXT    Round 1    Version 1    Event Format Buy

Origin A12    Commissioners Office

Event Type RFX    [Change to Auction](#)

Event Status Open    Time Zone CDT

\*Procurement Type Professional Tech/Services RFP

\*Event Name RFP for Legal Document Mgmt Review Services

Description Legal Document Mgmt Review Services include document collection and processing, review, project management, and

Preview Date 08/27/2019    Time 9:08AM

Start Date 08/27/2019    Time 9:08AM

End Date 09/03/2019    Time 9:08AM

Copy    Go

## Event Settings and Options

- The Category Code is not required on header.
- The Allow Bidder XML Downloads defaults and is operational.
- Notice of Intent to Award and Notice of Award default in.

**Event Settings and Options**

Business Unit R2001    Event ID NEXT    Round 1    Version 1    Event Format Buy    Event Type RFx

Create PDF on Event Post    Round/Version Display

Allow Bidder XML Downloads     Sealed Event

Bid Required On All Lines     Display Bid Factor Weightings

Multiple Bids Allowed

Allow Edit of Posted Bids     Display Bid Factor Best/Worst

Do Not Use Best Bids on New Rounds

Display Bid Factor Ideal Value

Allow Send NOIA Notification    \*NOIA Report Template

Notification to be Sent      Award Only after Notice End

Allow Send NOA Notification    \*Award Template

Notification To be Sent     \*Non-Award Template

## Header Bid Factors

- Bid factors no longer default in for 9.2 at the header.
- The Office of State Procurement (OSP) reviewed all header bid factors. They will be included in a document for bidders to review and download. This document also will include general terms and conditions.
- It is up to the event coordinator if they want to pull in header bid factors. You can still review or add existing bid factors or add ad hoc bid factors to an event.

**Event Bid Factors**

Event ID NEXT    Bid Factor Weighting Total 0.00000

Event Name RFP for Legal Document Mgmt Review Services    Remaining Bid Factor Weight 100.00000

**Bid Factors** ?

Seq Nbr 1    + -

\*Bid Factor     \*Type     Weighting

Question

Display Bid Factor?

Bid Factor Response Required

Ideal Response Required

Include on Contract

Best     Worst     UOM

- If you enter bid factors at the header, SWIFT requires that the event header bid factors Weighting field adds up to “100” before it will allow you to save the event.

Event Bid Factors			
Event ID	2000008861	<b>Bid Factor Weighting Total</b>	100.00000
Event Name	RFP Legal Document Management Review Services	Remaining Bid Factor Weight	0.00000

## Configure Line Items

- 9.2 does not use the price schedule option on the lines. In 9.1, there was no ability to report or query event line information using a price schedule. Agencies will need to enter lines separately on the event lines.
- Enter Category Code at the line level, not at the header.

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Supervision Basics	86100000	EA	1.0000			0.00000
2		Project Management	86100000	EA	1.0000			0.00000

- Agencies can upload a spreadsheet (e.g., delimited file) for events with many lines.

INV_ITEM_ID	DESCR254_MIXED	CATEGORY_CD	UNIT_OF_MEASURE	QTY_AUC	AUC_PRICE	WEIGHTING	COMMENTS_2000	DUE_DATE	SHIPTO_ID	FREIGHT_TERMS	SHIP_TYPE_ID	SHIP_FROM_LOC
Used only for inventory items	Description of Item (up to 254 characters)	Category Code (8 characters such as "10151700")	Unit of Measure (up to 3 characters)	Quantity (number such as "1.598" or "4")	Price (dollar amount such as "2.49")	Not used at this time. Keep blank.	Comments (up to 2000 characters). Optional.	Due Date (such as "12/1/2019")	Ship To Code (such as "R291000221")	Not used at this time. Keep blank.	Not used at this time. Keep blank.	Not used at this time. Keep blank.

## Invite Bidders

- Suppliers do not need to fully register in SWIFT to bid on events. They can register as a bidder, which does not require review and approval from the Vendor Support team.
- Agencies can now invite multiple contacts within a supplier record to ensure that the correct representative receives an invitation to bid on an event.

**NOTE:** Vendors are referred to as Suppliers in 9.2.

Bidder ID	Bidder Type	Status	Location	Contact Name	Contact Info	Bidder Company	Location Address	Open for Ordering	Invite
0000209182	Supplier	Approved	001	STEPHANIE PRATER	Contact Info	XEROX CORP	M	Yes	<input checked="" type="checkbox"/>
0000209182	Supplier	Approved	001	A J MOORE	Contact Info	XEROX CORP	M	Yes	<input checked="" type="checkbox"/>

## Collaboration

- As an option, you can invite other SWIFT users to collaborate on an event while you are creating the event. Collaboration is inviting other internal users to review the event online and provide feedback on it.
- Collaboration is date-driven. All of the reviews must be completed before the Preview Date of the event. SWIFT will open the event for posting even if all collaborators do not complete their reviews.

**Event Collaboration Details**

Collaboration Due Date: 08/16/2019 8:23AM  
 Process Type: Sequential

Review By Notifications:  Never  One day before  One week before  Weekly before deadline  Daily starting one week before

Review Sections

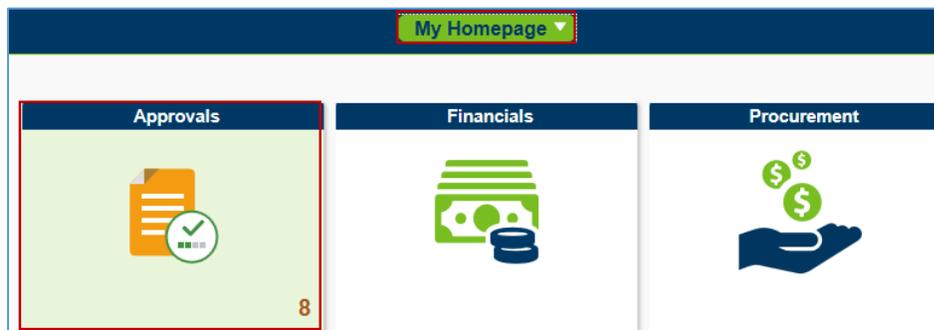
Seq Nbr: 1 Section Name: Bid Factor Default Option: None  
 Process Type: Sequential Section Review By Date: 08/16/2019 8:24AM  
 Analysis Collaborator:  Yes  No

Collaborators

Seq Nbr	Userid	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed	Allow RFX Document Edit
1		Employee Name	08/14/2019	8:24AM			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		Employee Name	08/13/2019	8:24AM			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

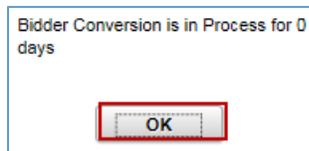
## Approve an Event

- Once you post an event, SWIFT submits it for approvals. Approvers can access the event on the Approver's tile from their My Homepage.
- Approvers can see an Alert that there are items for their review.



## Award an Event

- The Hold from Further Processing box has been removed in 9.2. Event coordinators need to make sure to post the award.
- If you award an event to a bidder who is not a registered supplier, SWIFT will not allow you to create a purchase order or contract with that bidder until they register and receive approval as a supplier in SWIFT.



- As an option, agencies can inform bidders of the results of analyzing bids and deciding upon an award. These notices are informational only.
  - A **Notice of Intent to Award (NOIA)** is an optional email notification from SWIFT to the bidders that the evaluation team selected a potential winning bidder for the event. It can be sent to all bidders or selected bidders. A Notice of Award (NOA) is an optional

email notification from SWIFT to bidders that the evaluation team has awarded a contract or purchase order.

Bid Event: 2000008884-Leadership Training  
Leadership  
01/04/2019

Natural Resources Department announces its intent to Award to the following applicant(s).

**THINK GREAT LLC, PRIOR LAKE, MN**

The following applicant(s) have also submitted bid responses

Bidder	Rejection Reason
3 M CO ST PAUL	Not Awarded
TEST	Not Awarded

- A **Notice of Award (NOA)** is an optional email notification from SWIFT to bidders that the evaluation team has awarded a contract or purchase order.

Bid Event: 2000008884-Leadership Training  
Leadership  
01/07/2019

THINK GREAT LLC  
PO BOX 1144  
PRIOR LAKE MN 55372

THINK GREAT LLC,

Natural Resources Department is pleased to award THINK GREAT LLC the following:

**Event ID:** 2000008884 Round 1 Version 1  
**Name:** Leadership Training  
**Award type:** Procurement Contract

**Awarded Details:**

Item ID	Description	Qty	Unit Price	Award Total	Currency
	Supervision Basics	1	4250.00	4250.00	USD
	Project Management	1	4250.00	4250.00	USD

## Global Search

The new Global Search may help you find event records more quickly.

- Select the Global Search icon in the top bar and enter your search criteria. In the example below, the search is limited to looking for records with a specific Event ID.
- Launch the search. Records matching your search criteria display on the **Search Results** page.
- Select a record in the search results to view more information.

**Search Results** Home Search

Sign Out Strategic Sourcing 2000010014 >>

**View Search Results**  
1 results for keyword: "2000010014"

Sourcing Document - H1201 | **2000010014** | test RFx  
2019-08-23-00.00.00.000000 | DC | MN\_DT\_EVENT\_SOLICIT | 153036

You can view information that where you have roles and permissions.