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.

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 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.

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.

- 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.
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.

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

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.

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.
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.

- 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.

**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.

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