SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create an Event

When creating a Strategic Sourcing event for either Acquisition or Professional/Technical (P/T) purchases, there are several steps you can take to successfully complete and post the event. Each step adds specific details to the event. The specific details will depend on the type of event and the level of detail needed for it.

This guide provides an overview of the steps to create an event in the Strategic Sourcing module for both Acquisition and P/T purchases.

There is an appendix at the end of this document describing the fields on some of the sections of an event.

Steps to complete:

- Step 1: Access and populate the header on the Event Summary page
    - *Procurement Type, Event Name, Description, Start Date/Time, End Date/Time*
- Step 2: Enter information in the Define Event Basics section
    - Event Settings and Options link: Review defaulted settings if needed.
    - Event Comments and Attachments link: Attach documents as needed for the event.
    - Event Bid Header Bid Factors link: Review this information after you enter the lines.
- Step 3: Configure Line Items
    - Basic Definition tab: *Description, Category, UOM, Qty, Start Price, Weighting*
    - Advanced Definition tab
        - *Details*
        - *Line Comments and Attachments*: Attach other documents as needed for the line.
        - *Line Bid Factors*: Add any line level bid factors.
    - Save: Get an Event ID.
- Step 4: Select Bidders to Invite
    - Check the **Public Event** Checkbox.
    - Invite Bidders
- Step 5: Invite Collaborators (Optional)
- Step 6: Post and Approve the Event
    - Preview PDF
    - Post the event to the Supplier Portal for bids

Steps to Create an Event

Step 1: Access and populate the header on the Event Summary page

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

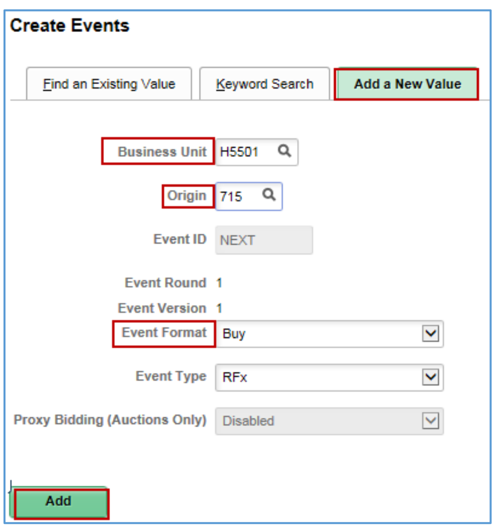
Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Events, Event Summary page, Add a New Value tab.
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value tab.

2. On the **Add a New Value** page, enter the following information.

Fields on the header of the Create Events page. Required fields are marked with an asterisk (*****).

Field Name	Field Description
*** Business Unit**	Agency responsible for the event.
*** Origin**	Area in the agency responsible for the event.
*** Event Format**	• Buy: Used for creating a RFB or RFP event • RFI: Used for creating a Request for Information (RFI)
*** Event Type**	• RFx: Default setting • Auction: Do not use

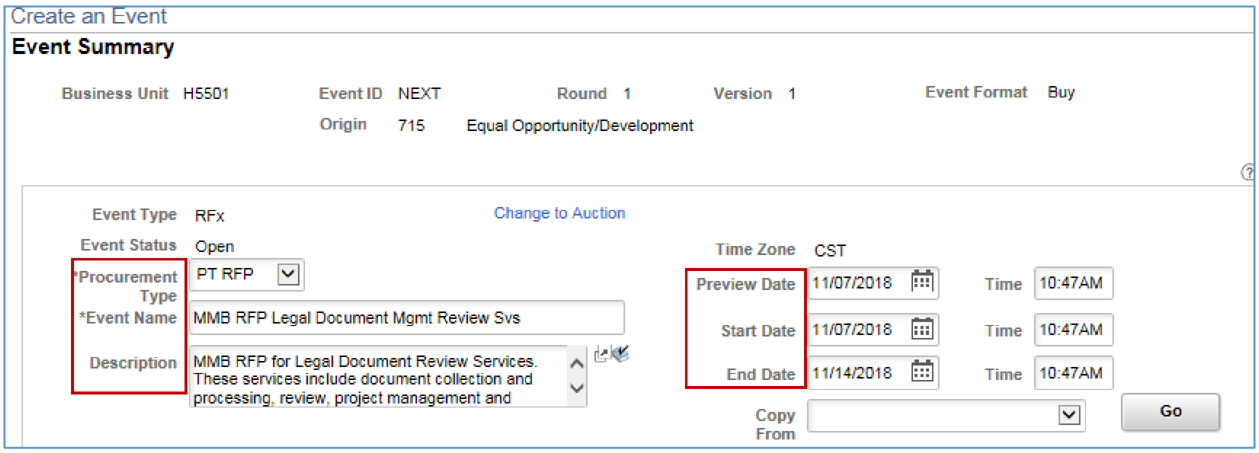
- Press **Add.**



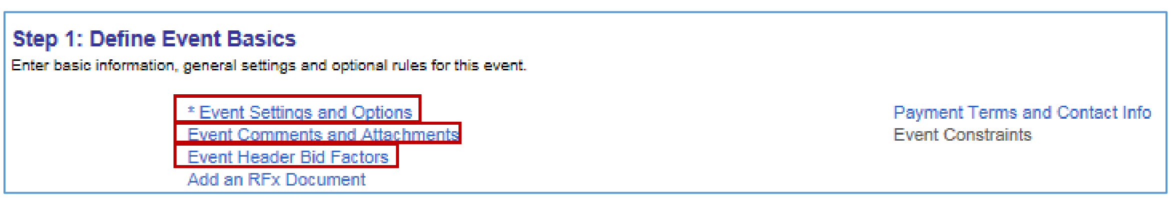
SWIFT displays the **Event Summary** page.

- Enter information on the header of the **Event Summary** page.
- The following fields are required on the header: *Procurement Type, Event Name, Description, Start Date/Time* and *End Date/Time*.
- The *Event End Date* defaults to one week after the *Preview* and *Start Dates*.

APPENDIX: Please see the Appendix at the end of this document for a description of the fields on the **Event Summary** header section.



Step 2: Enter information in the Define Event Basics section



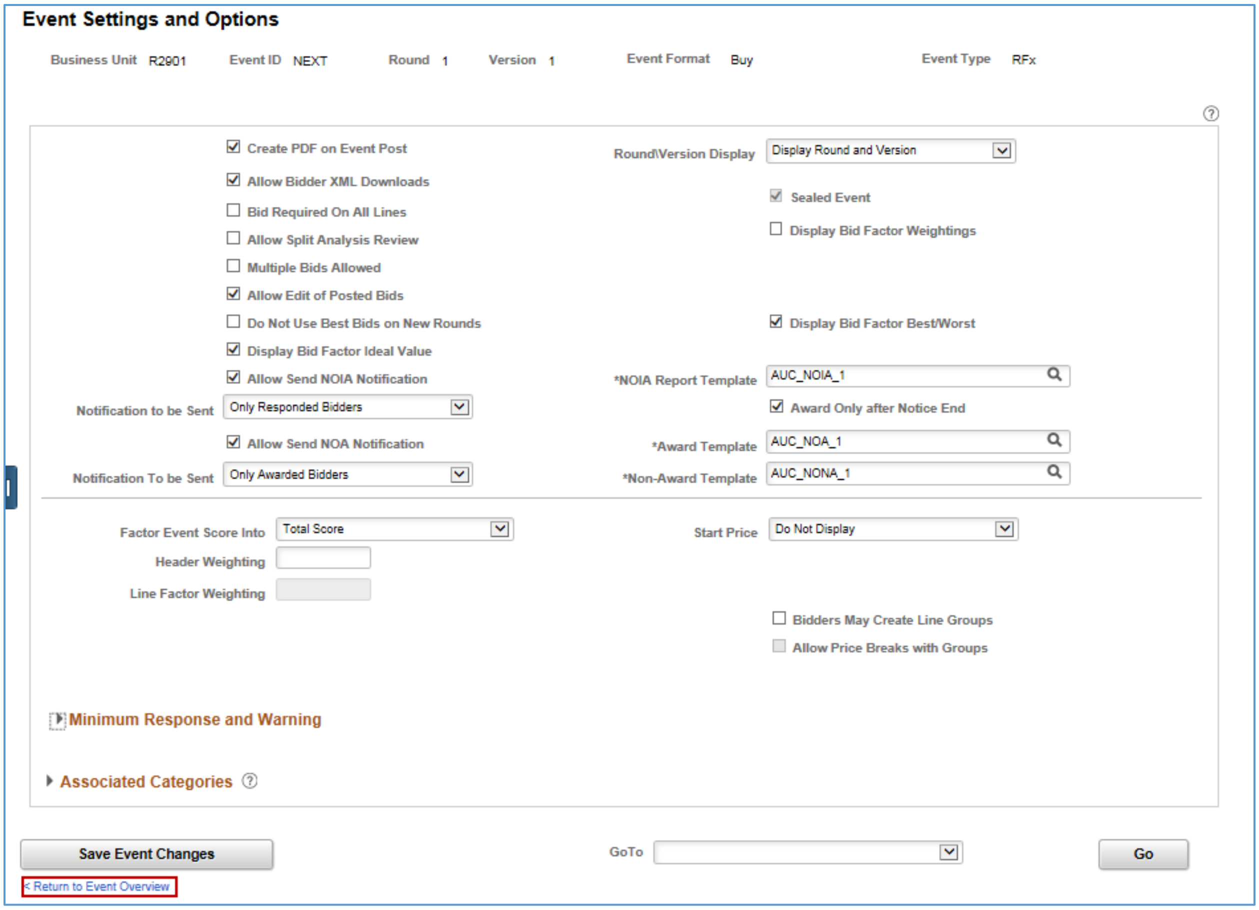
For a typical event, you may enter information on the **Event Settings and Options**, **Event Comments and Attachments** and the **Event Header Bid Factors** sections of the **Define Event Basics** section. Your agency may require you to add information in the other sections.

IMPORTANT: If you have entered Bid Factors, SWIFT requires that the **Event Header Bid Factors Weighting** adds up to 100 before it will allow you to save the event.

1. Select the **Event Settings and Options** link.

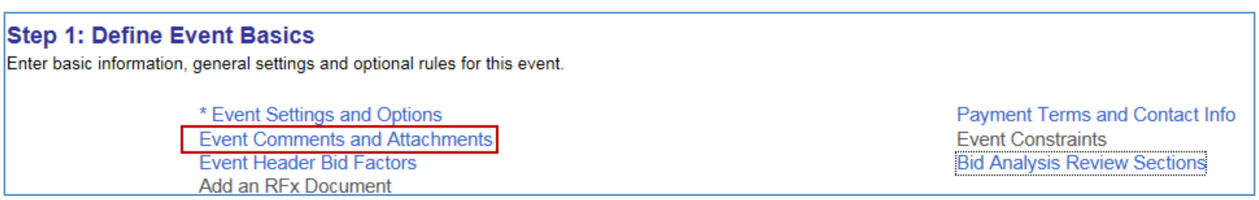
The **Event Settings and Options** page allows you to specify the rules related to an event, as well as what information can appear to bidders.

- Select the items in the checkbox that fit your event. Typically, you can use defaulted values unless your purchase requires other values.
- Press the **Return to Event Overview** link.



APPENDIX: Please see the Appendix at the end of this document for a description of the fields on the **Event Settings and Options** section.

2. On the **Define Event Basics** section, enter information on the **Event Comments and Attachments** page.

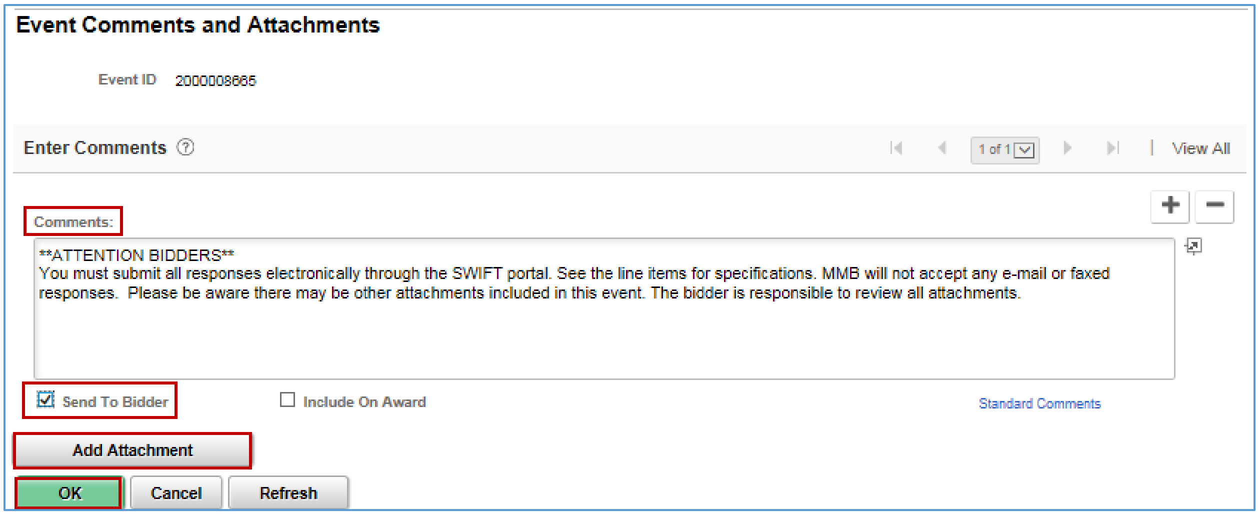


Use the **Event Comments and Attachments** page to attach documentation to the event. You can attach any documents, forms, applications or other materials needed for the event. You can attach documents for internal use or displayed to bidders by using the **Send to Bidder** checkbox.

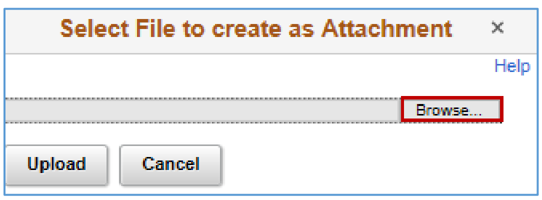
- Select the **Event Comments and Attachments** link.

SWIFT displays the **Event Comments and Attachments** page.

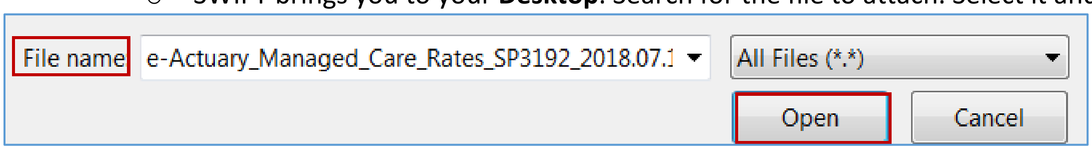
- In the **Comments** section, provide any comments needed for the event.
- Make sure to select the **Send to Bidder** box if you want SWIFT to display the comments to the bidder. For internal comments, do not select this box.



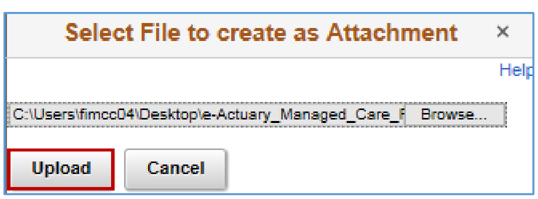
- Select the **Add Attachment** button.
  - SWIFT displays the **Select File to create as Attachment** box. Select **Browse**.



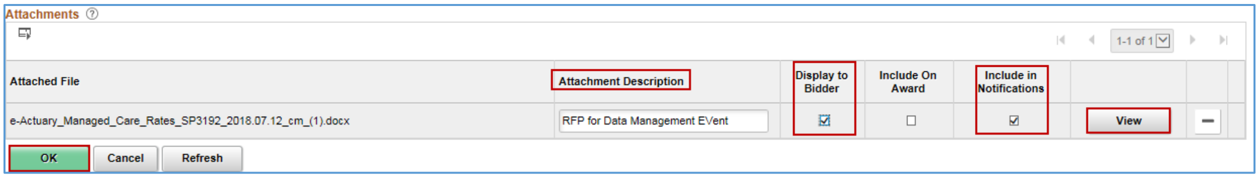
  - SWIFT brings you to your **Desktop**. Search for the file to attach. Select it and press **Open**.



  - SWIFT displays the updated **Select File to create as Attachment** box. Select **Upload**.

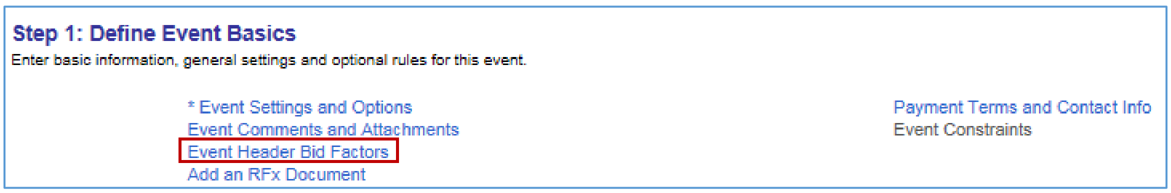


- SWIFT displays the **Attachments** box at the bottom of the **Event Comments and Attachments** page.
  - Add an *Attachment Description*.
  - Make sure to select the **Display to Bidder** and **Include in Notifications** boxes if the information is to be displayed to the bidders.
  - Press the **OK** button at the bottom of the page.



- SWIFT returns you to the **Event Summary** page.

3. On the **Define Event Basics** section, enter information on the **Event Header Bid Factors** link. Enter this information after you enter the event lines.



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.

REMINDER: If you enter bid factors, SWIFT requires that **Event Header Bid Factors Weighting** adds up to “100” before it will allow you to save the event.

- Select the **Return to Event Overview** link.

Step 3: Configure Line Items

NOTE: RFI events do not have any lines. This step will not appear on an RFI type event.

Event lines become the lines on the resulting contract or purchase order. They should accurately describe what needs to be purchased.

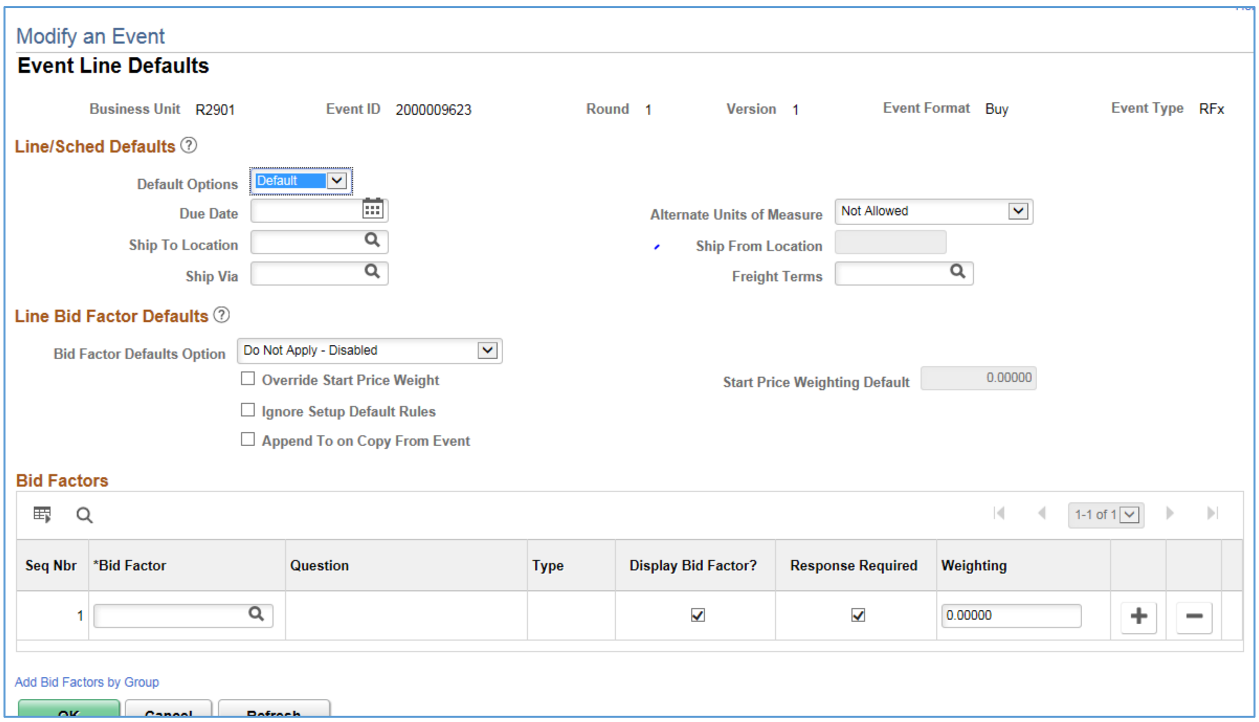
- Lines can be very specific to define the purpose of the bid.

- Line details may default based on previous documents (events, requisitions, templates) you used to create the event.
- The Category Code must be entered on each of the event lines.

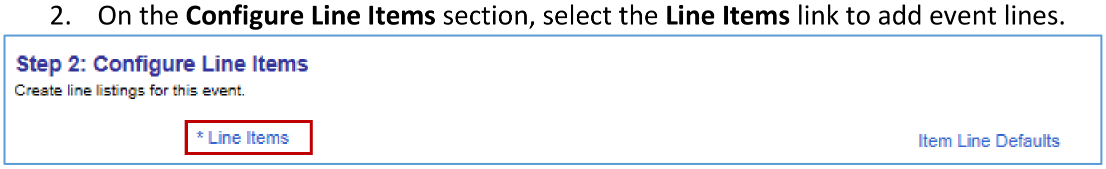
The **Configure Line Items** section provides links to create line listings for an event. There are two links to review for data entry.

1. **Item Line Defaults** can be used to assist in data entry.

Entering the *Due Date, Ship To Location, and Ship Via* details on the **Item Line Defaults** link will populate those fields on each line of the event with the values entered on the **Event Line Defaults** page.



2. On the **Configure Line Items** section, select the **Line Items** link to add event lines.



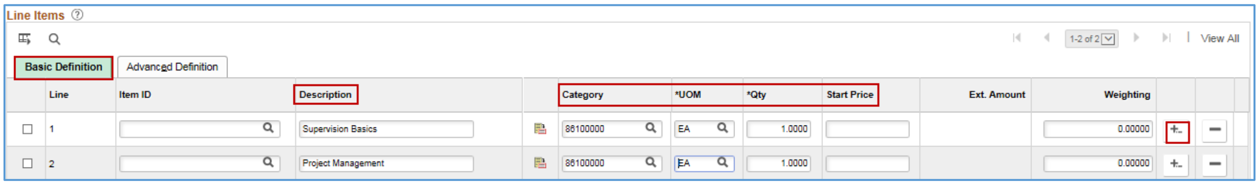
SWIFT displays the **Line Items** page.

- You can enter lines directly or by copying them from another document such as a requisition or an existing sourcing event.
- You can also upload a spreadsheet (e.g., delimited file) for events with many lines.
- If you copy the lines, you can remove lines you do not need or add additional lines using the “+” or “-“ icons.

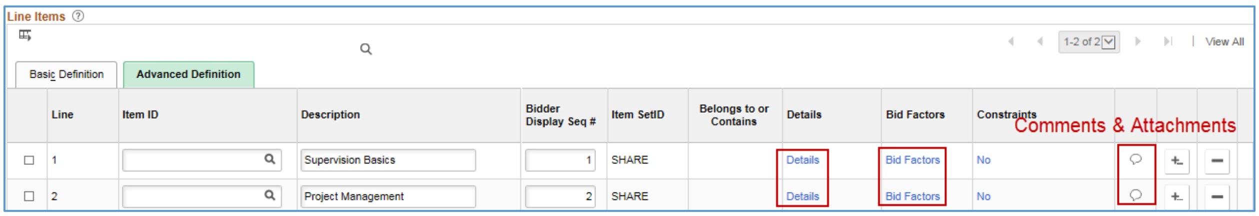
APPENDIX: Please see the Appendix at the end of this document for a description of the fields on the **Line Items** section.

3. On the **Basic Definition** tab, review or provide details of the event for each line on the event.

- *Description:* Describes the details of the purchase.
- *Category:* UNSPSC code used to represent the type of goods or services being purchased.
- *UOM:* Unit of Measure
- *Qty:* Quantity, how many of the items to purchase
- *Start Price:* This is an estimate for internal purposes only. Enter a number that is realistic for the purchase.

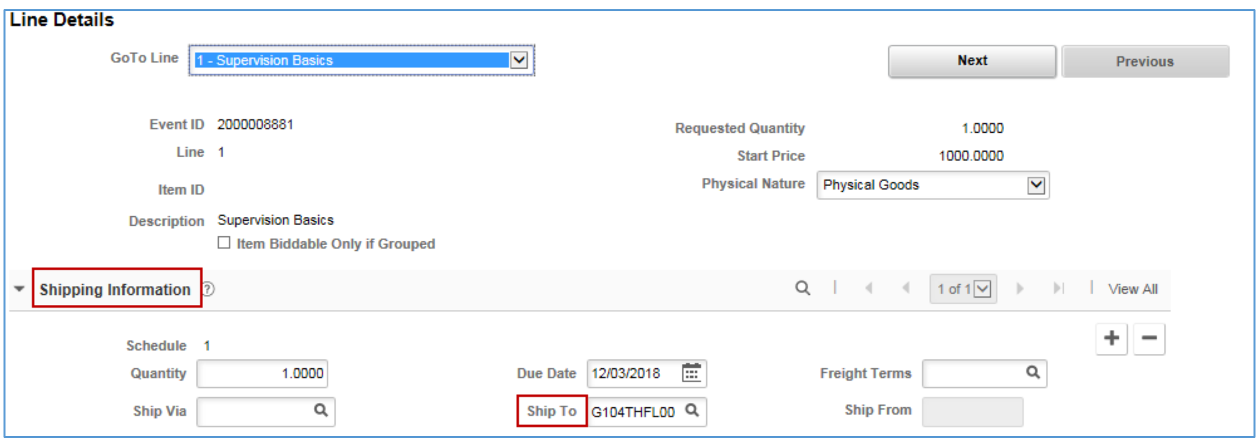


4. On the **Advanced Definition** tab, add *Shipping Information* on the **Details** link, line bid factors (as needed) and comments and attachments (as needed) for each line on the event.



a. Shipping Information: This information can be added to all lines by populating it on the Item Line Defaults, or added to individual lines.

- Add *Shipping Information* to individual lines by selecting the **Details** link for each line on the **Advanced Definition** tab. SWIFT displays the **Line Details** page.
- On the **Shipping Information** section, use the look up to select the correct *Ship To* Location. Then, select the **Return to Event Lines** Page link. Add *Shipping Information* on all lines.



b. Bid Factors:

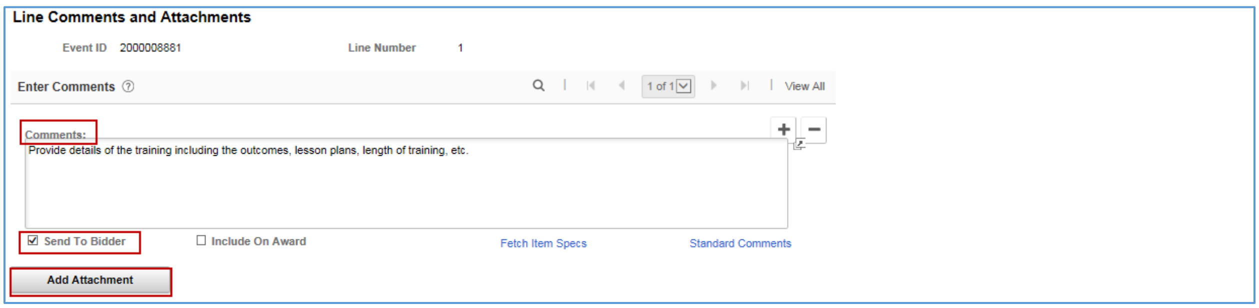
Review and add or update any bid factors for each line on the **Advanced Definition** tab. If you want to create bid factors at the line, select the **Bid Factor**s link. SWIFT opens up the Line Bid Factors page. Add, delete or update any bid factors as needed.

IMPORTANT: The *Bid Factor Weighting Total* must add to "100.00" for each line or you cannot save this event.

c. **Comments:**

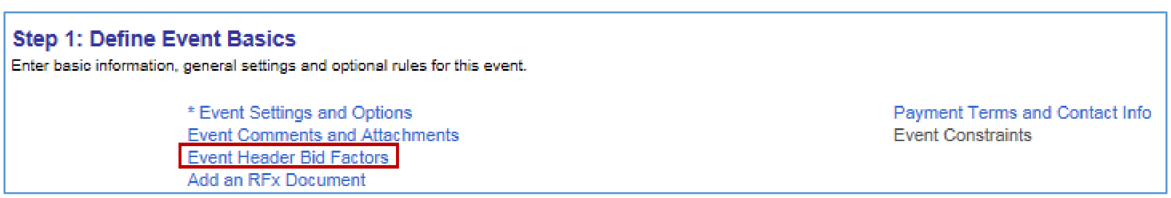
Add any line comments or attachments. Press the **Line Comments and Attachments** icon. SWIFT displays the **Line Comments and Attachments** page. This page works in the same way as the other comments and attachments pages in SWIFT.

- In the **Comments** section, add any needed comments related to the line.
- Select the **Send to Bidder** check box if the comments are to be displayed to the bidders.
- Select the **Add Attachment** button and add any attachments.
- Press OK.

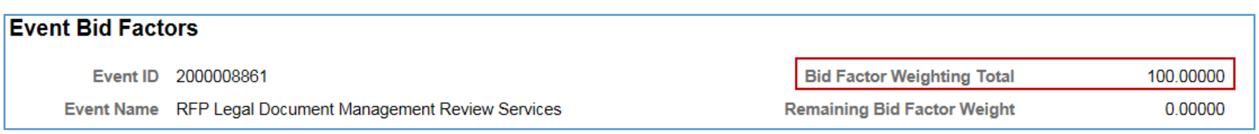


- SWIFT displays the **Line Items** page.

5. Press the **Save Event Changes** button. If there are no errors, SWIFT will display the *Event ID*.
    - Select the **Return to Event Overview** link.
6. Return to the **Define Event Basics** section and enter information on the **Event Header Bid Factors** link if needed.



- SWIFT opens up the **Event Bid Factors** page. Add or delete bid factors as needed and update the *Weighting* field on them. They must add up to "100".

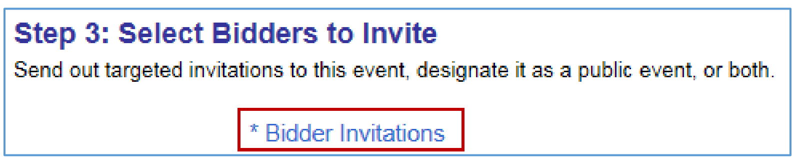


Step 4: Select Bidders to Invite

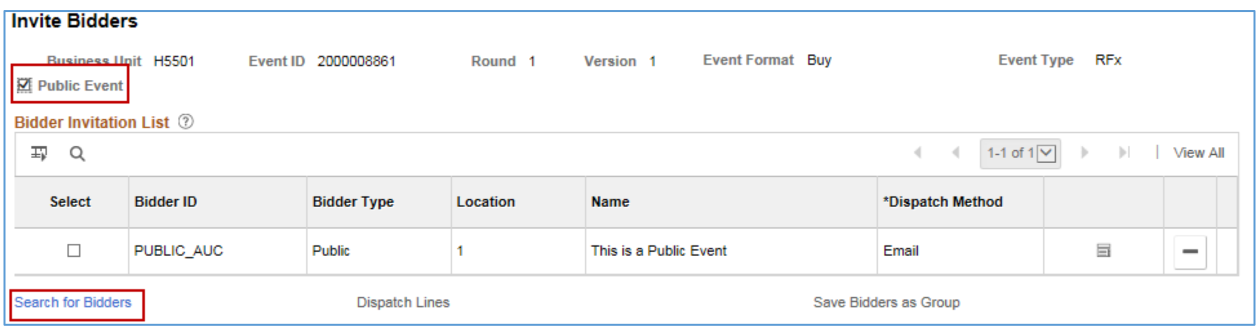
IMPORTANT: SWIFT requires that each event is either marked "Public" or has at least one invited bidder or it will not post the event.

- Once you enter the specific details of the event, make sure the event is a public event on the **Invite Bidders** page.
- You can also invite specific bidders or individuals to participate in the event. SWIFT sends email notifications to invited bidders about the event after you post it. Bidders you did not invite can participate in the event if it is a public event by logging into the supplier portal.
- Agencies must follow state policy and invite Targeted (TG), Economically Disadvantaged (ED), Veteran-Owned (VO) bidders. You can search for and invite TG, ED and VO bidders in this section.
- 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.
- You can also invite multiple contacts within a supplier record to ensure that the correct representative receives an invitation to bid on an event.

1. Select the **Bidder Invitations** link.



SWIFT displays the **Invite Bidders** page.



2. On the **Invite Bidders** page, make sure the event is public event.

The **Public Event** checkbox defaults in as checked. Uncheck it only for a private invitation event.

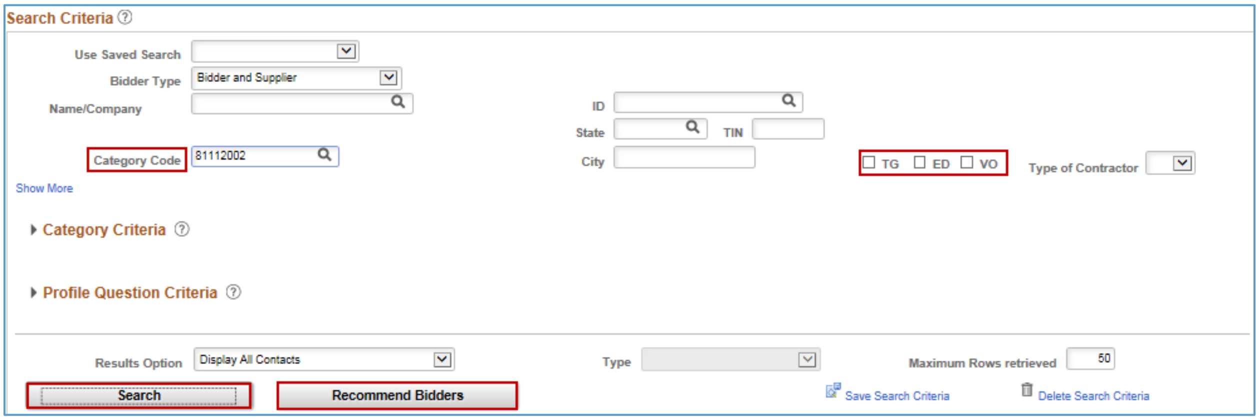
3. Search for bidders.

- To locate specific bidders to invite, select the **Search for Bidders** link.

SWIFT displays the **Bidder Search** page.

- Enter the desired search information. Typically, you can select the **Recommend Bidders** button and allow the system to recommend potential bidders. You can search by *Category Code* to find bidders who listed that expertise in their bidder profile. You can also search by *TG, ED or VO* bidders.

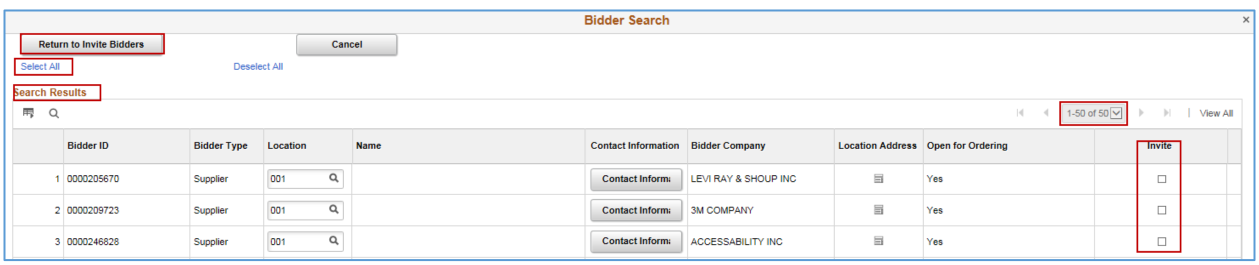
- Once you enter the search criteria, select the **Recommend Bidders** button or the **Search** button to display bidders matching your criteria.



4. Invite bidders.

SWIFT updates the **Bidder Search** page with the **Search Results** section, which is a list of bidders and bidder contacts that met your selected criteria. They appear in order of the *Bidder ID*. Locate the desired bidder(s) from the search results.

- You can see how many bidders met the search criteria at the top of the search results section.
- Select the **Invite** checkbox to invite those bidders you want to receive an invite notification for the event when you post it.
- You can also press the **Select All** link to invite all bidders on the list.



- Select the **Return to Invite Bidders** button located at the top or bottom of the page.

SWIFT returns you to the **Invite Bidders** page.

- You can see the list of bidders that you selected for invitations. SWIFT will send an email invitation to bid on the event to these bidders.
- Select the **Save Event Changes** to save any changes made to this page.
- Select the **Return to Event Overview** link to return to the **Create an Event** page.

Step 5: Invite Collaborators (optional)

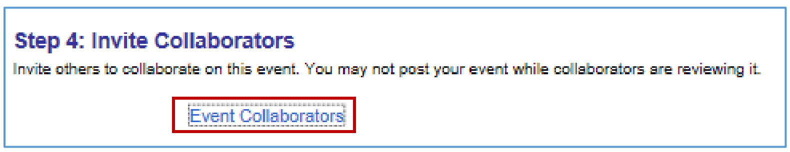
As an optional step, you can invite other internal SWIFT users to collaborate on an event. Collaboration is the process of inviting other internal users to review the event online and provide feedback on it. The event creator can cancel or reroute the collaboration process as needed.

- Once you add the collaborators to the event and post it, SWIFT will change the status from "Post" to "Route".
- SWIFT will send a collaboration email notification, a worklist task, or both to the collaborators depending on their user preferences.

IMPORTANT! Collaboration on the Strategic Sourcing module is date-driven.

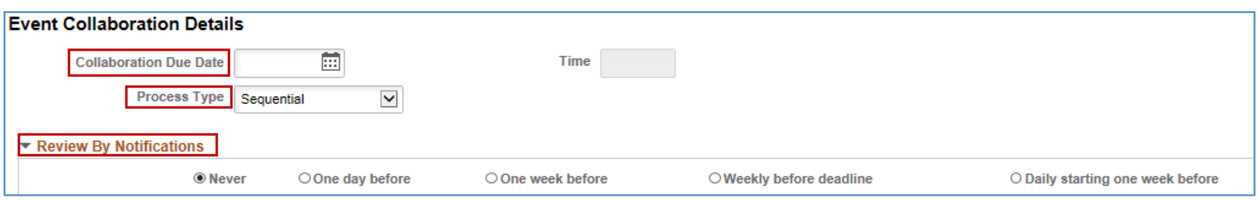
- All of the collaborators must complete these reviews before the *Preview Date* of the event. If they aren't completed, SWIFT will open up the event for posting even if the collaboration has not been performed. This differs from workflow, which will not allow the event to be posted until approvals are completed.
- Make sure you plan enough time for all collaborators to complete their reviews before the *Collaboration Due Date* on the **Event Collaboration Details** page and the *Preview Date* on the **Event Summary** page.

1. On the **Event Summary** page, select the **Event Collaborators** link.



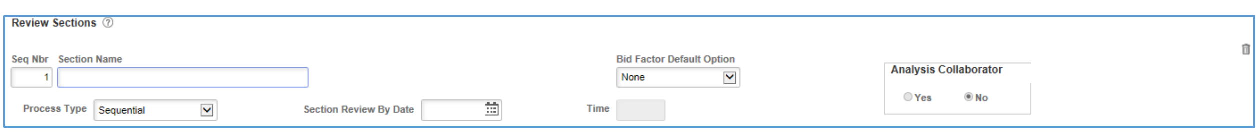
2. SWIFT displays the **Event Collaboration Details** page. Enter the following information.

- *Collaboration Due Date:* This is the date when all collaboration must be completed. It must be before the *Preview* and *Start Dates* of the header of the **Event Summary** page. Make sure your collaborators have enough time to complete their reviews.
- *Process Type:* Choose "Sequential". SWIFT will open up the collaboration in the order you determine by using the *Sequence Number* in the **Review** sections.
- *Review by Notifications:* SWIFT does not currently use this feature. Keep it to "Never".



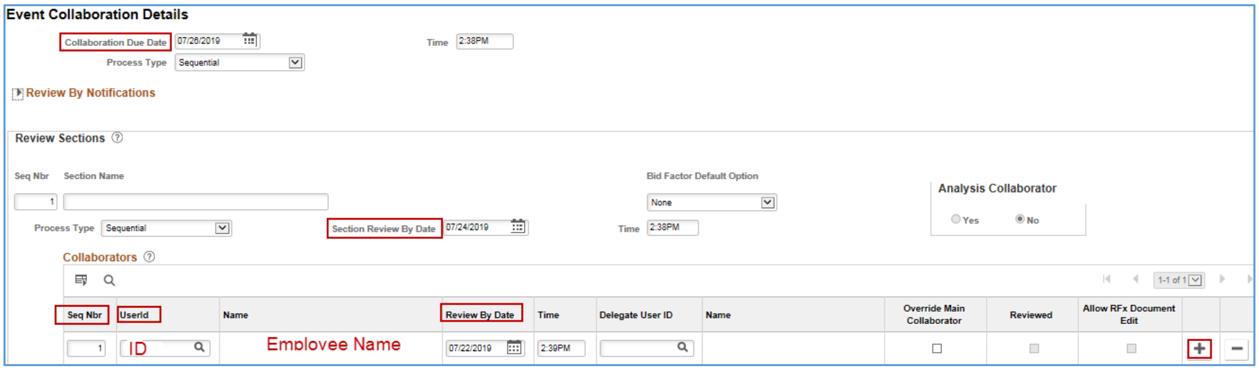
3. In the **Review Sections** area, you can create separate sections for collaboration or set up one section with multiple collaborators.

- Enter the *Sequence Number* and *Section Name*.
- Set the *Process Type* to "Sequential".
- Make sure that the *Section Review By Date* is completed and fits within all of the dates of the event listed on the **Collaboration Details** page and the *Preview Date* on the **Event Summary** page.



4. Enter the following information for each collaborator on the **Collaborators** section of the **Event Collaboration Details** page.

- Seq Nbr
- User ID
- Review by Date



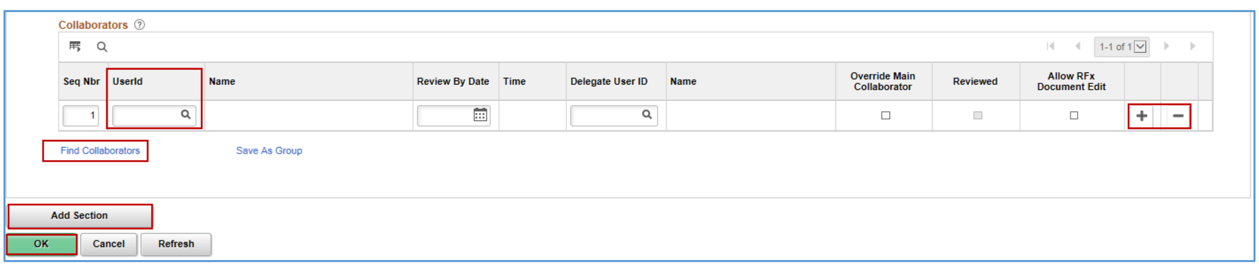
- As needed, you can use the **Add a New Row** icon ("plus" symbol) to add another line.

IMPORTANT! Notice the dates.

- The *Collaboration Due Date* is later than the **Section Review By Date** or the individual employee's *Review by Date(s)*.
- The individual employee's *Review by Date* is earlier than the *Section Review by Date*.
- All of these dates are earlier than the *Preview Date* on the **Event Summary** page.

If the dates are not aligned correctly, SWIFT will give you error messages and will not save the information on the **Event Collaboration Details** page.

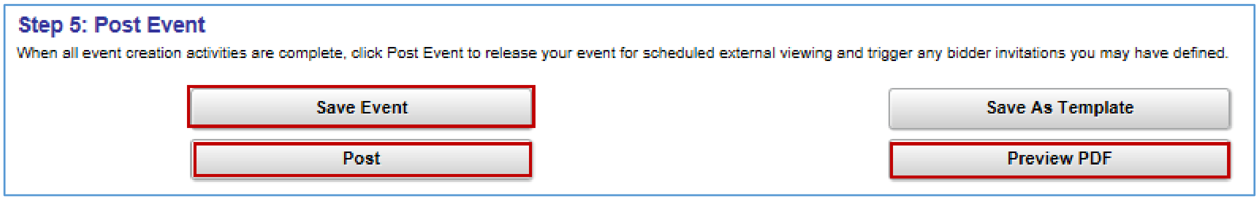
5. Press the **OK** button at the bottom of the page to complete setting up the collaboration.



APPENDIX: Please see the Appendix at the end of this document for a description of the fields on the **Event Collaboration Details** page.

Step 6: Post and approve the Event

On the **Event Summary** page, go to the bottom of the page.



1. Save the event:

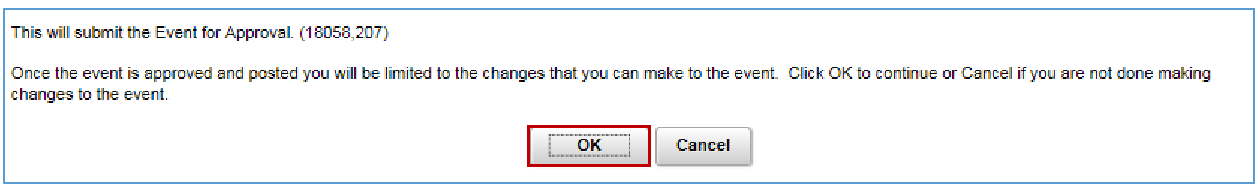
Press the **Save Event** button to save all of the changes prior to posting.

2. Preview the PDF.

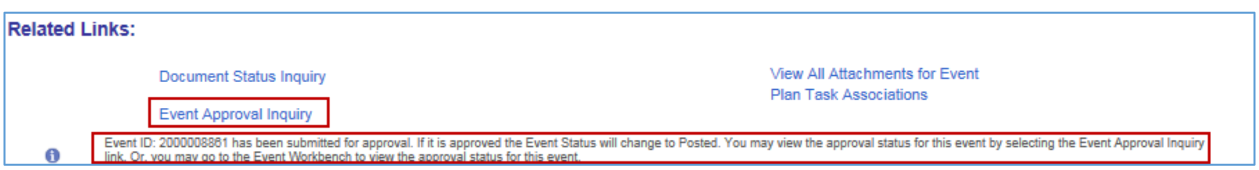
As a best practice, press the **Preview PDF** button. SWIFT displays a message if you wish to have a copy of the PDF emailed to you. Select “Yes”. View the copy of a PDF on your Desktop.

3. Post the event. Press the **Post** button at the bottom of the page.

If you didn’t add any collaborators, SWIFT displays a message about submitting the event for approval. Select **OK**.



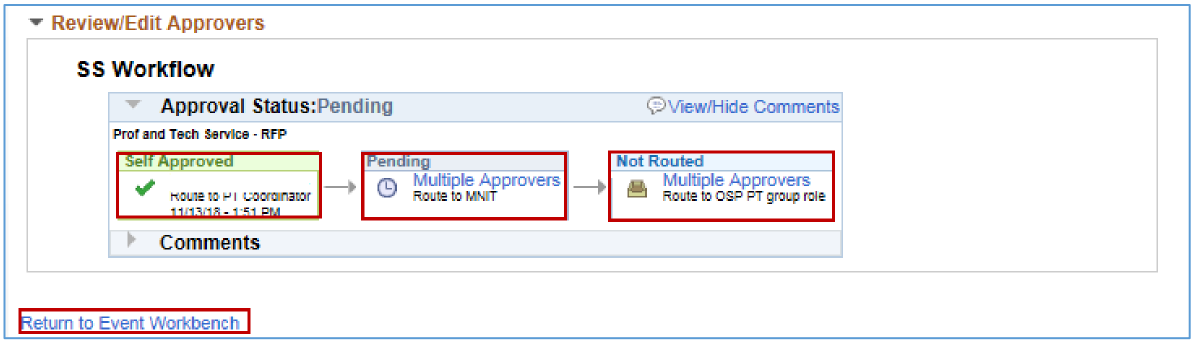
4. Follow approvals of the event. If you required approval, after you submit the event, SWIFT will provide a notification at the bottom of the page that the event was successfully submitted for approval.



- To view the approval list, select the **Event Approval Inquiry** link at the bottom of the page.

SWIFT displays the **Approval Status** page.

- View the **Review/Edit Approvers** section. You can see the status of approvers.



After all of the approvers review and approve the event, SWIFT will update the status to “Posted”.

- The event is ready for bidders to respond to it.
- SWIFT will send invitations are sent to invited bidders.
- If it is a public event, SWIFT posts the event on the supplier portal. Bidders who did not receive invitations can log in and bid on the event.

You have successfully created an event in Strategic Sourcing.

Appendix

1. Fields on the Event Summary Header section

Required fields are marked with an asterisk (*****).

Field Name	Field Description
*** Procurement Type**	The Procurement Type selected is used for reporting purposes. • **RFB**: A request for bid (RFB) is a solicitation in which the terms, conditions, and specifications are described and responses are not subject to negotiation. • **RFI:** A request for information (RFI) is a type of solicitation whose purpose is to collect written information about a potential project. It is not a formal solicitation and does not result in an award. • **RFP:** A request for proposal (RFP) is a solicitation which describes the needs of the project and asks for proposed solutions from vendors. The method by which the project is completed by the selected vendor, terms and conditions, and pricing may be subject to negotiation. • **ACQ One:** Used only by the Office of State Procurement (OSP) • **ACQ RFB:** Used only by the Office of State Procurement (OSP) • **ACQ RFI:** Used only by the Office of State Procurement (OSP) • **ACQ RFP:** Used only by the Office of State Procurement (OSP) • **ALP RFB:** Used by agency buyers for creating RFB requests for goods and services. • **Grant RFI:** Used for creating RFI requests for outgoing grants. • **Grant RFP:** Used for creating RFP requests for outgoing grants. • **PT RFI:** Used for creating RFI requests for professional and technical services. • **PT RFP:** Used for creating RFP requests for PT services.
*** Event Name**	Short description of the purpose for the solicitation and goods or services needed. It is displayed on the Event Workbench and is viewable to bidders on the Supplier Portal.
*** Start Date/Time**	Date and time after which bidders can submit event responses.
*** Description**	Description provides an overall description of the event and any other pertinent information potential bidders may need to know. The field length is unlimited. Use it to make it clear to bidders what they need to know and to provide to the agency on bids.
Preview Date/Time	This is the date and time that bidders can review the event before it is officially open for responses (bid).

Field Name	Field Description
*** End Date/Time**	This is the date and time the event will close and SWIFT will not accept any further electronic proposals. • If your agency accepts non-electronic bids, they cannot be accepted after this date and time. • Agencies who receive proposals non-electronically can enter the proposal into SWIFT after the End Date/Time as long as they were received prior to this End Date/Time.
Copy from	If needed, event or line details can be copied into the event using the *Copy From* field. • **Delimited File**: You can import event line information from a spreadsheet into an event. You can avoid manually entering line information. • **Item Master:** Not used in SWIFT. • **Request For Information**: Copy information from an existing RFI. • **Requisition:** Copy lines from an existing requisition. Copying the requisition lines will link the requisition to the event. • **Sourcing Event**: Copy details from an existing event. • **Sourcing Template:** Copy details from an existing event template.

2. Fields on the Event Settings and Options section

Required fields are marked with an asterisk (*). The Office of State Procurement has determined the defaulted values on this page but you can change them as needed.

Field Name	Field Description
Create PDF on Event Post Checkbox	Leave the box checked. This option creates a PDF version of the sourcing event and attaches it to event notifications.
Allow Bidder XML Downloads Checkbox	Allows bidders to bid on an event by downloading the event details into an XML document, populating the fields outside of SWIFT and uploading the information back into the event via the Supplier Portal.
Bid Required on All Lines Checkbox	Select this check box if you require bidders to bid on all lines on the event. If checked, the bidder will not be able to save their response without entering a bid or selecting the decline to bid checkbox on each line of the event.
Multiple Bids Allowed Checkbox	Defaults as unchecked. • If checked, bidders can submit multiple, simultaneous bids (also known as alternative bids). • If unchecked, bidders can only submit one bid on an event.
Allow Edit of Posted Bids Checkbox	Leave it checked. Allows bidders to change an existing bid after they submit it. SWIFT allows changes until the End Date and Time of the event.

Field Name	Field Description
Do Not Use Best Bids on New Rounds Checkbox	Leave as unchecked.
Display Bid Factor Ideal Value Checkbox	Select to display the ideal value for the bid factor on the bidder's Create Bid Response page.
Allow Send NOIA Notification (Notice of Intent to Award)	Optional feature. Refers to communication from SWIFT to bidders that an award is forthcoming.
Notification to be Sent	This field only appears if you check the Allow Send NOIA Notification box. Allows users to have the NOIA notification sent to: • All Bidders • Only Responded Bidders • Specific Bidders You can change this setting at the time that SWIFT sends the notification.
Allow Send NOA Notification (Notice of Award)	Optional feature. Refers to communication from SWIFT to bidders that an award has been made.
Notification to be Sent	This field only appears if you check the Allow Send NOA Notification box. Allows the agency to send NOA notifications to: • All Bidders • Only Awarded Bidders • Only Non-Awarded Bidders • Specific Bidders You can change this setting at the time that SWIFT sends the notification.
Round/Version Display Menu	• **Display Round:** Displays only the current round of an event to bidders. • **Display Round and Version**: Defaults to this option and this is the preferred setting. Displays both the current round and the current version of the event to bidders. • **Do not Display:** SWIFT will not display the current round or the current version to bidders.
Sealed Event Checkbox	Agency staff cannot view the bids from bidders until the End Date/End Time is reached.
Display Bid Factor Weightings Checkbox	Defaults as unchecked. State of Minnesota does not use this feature.

Field Name	Field Description
Display Bid Factor Best/Worst Checkbox	Defaults as checked. Select to show the best and worst values for the bid factor on the Create Bid Response page. • If checked, bid factors with a date, monetary, or numeric response will display the best and worst values as indicated in the bid factor set-up.
NOIA Report Template	There is currently one Notice of Intent to Award template.
Award Only after Notice End	Leave as checked.
Award Template	There is currently only one Award template.
Non-Award Template	There is currently only one Non-Award template.
Factor Event Score Into Menu	State of Minnesota does not use this feature.
Header Weighting Field	State of Minnesota does not use this feature.
Line Factor Weighting Field	State of Minnesota does not use this feature.
Start Price Menu	State of Minnesota does not use this feature.
Bidders May Create Line Groups Checkbox	State of Minnesota does not use this feature.
Allow Price Breaks with Groups	State of Minnesota does not use this feature.
Minimum Response and Warning	State of Minnesota does not use this feature.
Associated Categories	State of Minnesota does not use this feature.

3. **Fields on the Line Items page**

Field Name	Field Description
Filtered View	You can select a value to filter the lines displayed in the Line Items grid.
Group Selected Lines	Select a value to add lines to or remove lines from a group. Optional.

Field Name	Field Description
Copy From	You can create line items by copying them from the following existing documents: • **Delimited File:** You can import event line information from a spreadsheet. You can avoid manually entering line information. • **Item Master:** Used only by the agencies who use SWIFT's Inventory module. • **Request for Information:** You can copy lines from an RFI onto an event. • **Requisition:** You can copy lines from requisitions onto buy events. You can copy multiple lines from multiple requisitions into a single event. The system creates a separate line on the sourcing event for each line copied from the requisition. SWIFT will combine lines that have identical descriptions and combine the quantities. • **Sourcing Event:** You can copy from an existing event. • **Sourcing Template**: You can copy from an event template.

4. **Fields on the Event Collaboration Details page**

Field Name	Field Description
Seq Nbr (Sequence Number)	This field will determine the order that each collaborator receives access to the event.
UserID	Employee ID of each invited collaborator. You can use the Look Up icon to find the employee name and ID.
Review by Date	This is the date by which you want the individual collaborator to complete their review.
Delegate User ID	State of Minnesota does not use this feature.
Override Main Collaborator box	State of Minnesota does not use this feature.
Allow RFx Document Edit	State of Minnesota does not use this feature.
Add Section button	Allows the user to add different groups of collaborators as a separate section. This is optional.