

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### Create a New Round of an Event

Multi-round events are useful when you make changes to the event requiring additional input from the bidders, or when you evaluate and narrow bids to a select group for further negotiation.

Here are some factors to consider in creating a new round of an event.

1. **Countered Bidders:** You can select to counter one or more bidders for the overall event or for individual lines. SWIFT invites countered bidders to respond to the new round. SWIFT only includes countered lines in the new round.
2. **Partially Awarded Lines:** If an agency partially awards a line and counters this line, SWIFT displays the remaining quantity (original line quantity minus the awarded quantity) on the new round. If a line originally had a quantity of “100” and you awarded a quantity of “40” in Round 1, then you can make Round 2 with “60” as the line quantity.
3. **Communication of the New Round:** SWIFT posts the new round to the invited bidders. SWIFT sends a new invitation that includes the new counter PDF version of the event. When a bidder bids on the new round, the bidder can view his or her initial bid and the countered offer.
4. **Bidders Responses:** Bidders can withdraw, accept, or counter the counter offer either at the event level or for each line. If a bidder withdraws, the bidder cannot bid on any portion of the event from that point forward.
5. **Agency Responses:** Once the bids are received on the counter, the analyzer can review the bids and choose to accept (award), reject, or counter. This process can continue indefinitely until the event is awarded or manually closed.

Steps to complete:

- Step 1: Access the event in the Event Workbench
- Step 2: Select bidders to invite
- Step 3: Initiate a new round

### Steps to create a new round of an event

#### Step 1: Locate an event using the Event Workbench

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

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

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

**Event Workbench**

**Search Criteria**

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With  Origin

Plan

From Start Date  To Start Date

From End Date  To End Date

Category

Item ID

Description

Plan  Name

Sort With

Sort Order

Only show Events I created

Only show Active Events

Use my search defaults

**Search** **Reset**

[Default Search Preferences](#)

- SWIFT displays your search results. On the event you wish to create a new round, press the **Analyze Bids** icon.

Search Results

2000008328 | DNR R4 RFB Sibley ... | Buy | RFx | R2901 | A82 | Pending Award

**Analyze Bids icon**

## Step 2: Select bidders to invite

SWIFT brings you to the **Analyze Total** page for that event.

- Go to the **Analysis** section of the page.
- Below the **Bidders Name**, select “Counter” in the *Bid Action* field for bidders to invite for the next round.

**Bid Action** Counter  Counter  Counter  Counter

Reject Reason

Award by Percent

Hide Bid

## Step 3: Initiate a new round

1. At the header of the **Analyze Total** page, find the **Go To** menu and select *Create New Round*.

**Analyze Total**

Analyze Total [Analyze Line](#)

Business Unit: R2901 | Origin: A54 | Event ID: 2000002078 | Round: 1 | Version: 1 | Event Name: Data Analytics

Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 11/26/2013 2:00PM CST | Status: Pending Award

External Bid Tab

Make Tabulation Public

**Go To:** **Create New Round**

2. SWIFT displays the **Event Summary** page for that event.

You can see that SWIFT created a new round. Add additional information and details to the event.

**IMPORTANT!** Always include information about the new round in the *Description* field.

**Event Summary**

Business Unit R2901    Event ID 2000002078    **Round 2**    Version 1    Event Format Buy

Origin A54    OMBS Central Office

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Event Type RFX    [Change to Auction](#)

Event Status Open    Time Zone CST

\*Procurement Type **PT RFP**    Preview Date 12/20/2018    Time 8:40AM

\*Event Name Data Analytics    Start Date 12/20/2018    Time 8:40AM

Description **NEW ROUND** NEW END DATE CHANGE. SEE QUESTIONS AND ANSWERS ATTACHED. Data Analytics for Recreational Customers to compile a    End Date 12/27/2018    Time 8:40AM

Copy     **Go**

3. After you have made all of your changes, go to the bottom of the page and press the **Save Event** button.
4. When you are ready, press the **Post** button.

SWIFT sends a message that says it will submit the event for approval. Select **OK**.

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

  

Once SWIFT posts the event, bidders may submit their bids just like the first round. After the new round has ended, analyze and award the event as appropriate.

5. SWIFT keeps a history of the initial round as well as any additional versions of the event.
  - You can view these changes on the **Event History** page. Access it from the **Event Workbench**. Press the **Event History** icon.

Search Results

Event ID	Name	Format	Type	Unit	Origin	Status	Event History icon
2000002078	Data Analytics	Buy	RFX	R2901	A54	Pending Post Approval	

- SWIFT opens up the **Event History** page. You can see the **Version History** showing the new round.

**Event History**

**Event Information**

Bus. Unit	Event ID	Event Name	Format	Type	Status
R2901	<a href="#">2000002078</a>	Data Analytics	Buy	RFX	Pending Post Approval

**Version History**

Round	Version	Event Status	Modified By
2	1	Pending Post Approval	
1	1	Inactive Version	

**You have successfully created a new round for an event.**