

QUICK REFERENCE GUIDE

Updated November 1, 2019

Export Bids for Analysis on an Event

Agencies can analyze bid responses outside of SWIFT by exporting the bidder responses and bid details for offline analysis. This export does not include comments and attachments that bidders added during the bidding process.

Steps to complete

- Step 1: Access the event in the Event Workbench
- Step 2: Access the Bid Analyze Export page and set up the export
- Step 3: Save the document on your desktop
- Step 4: Open the document from your desktop

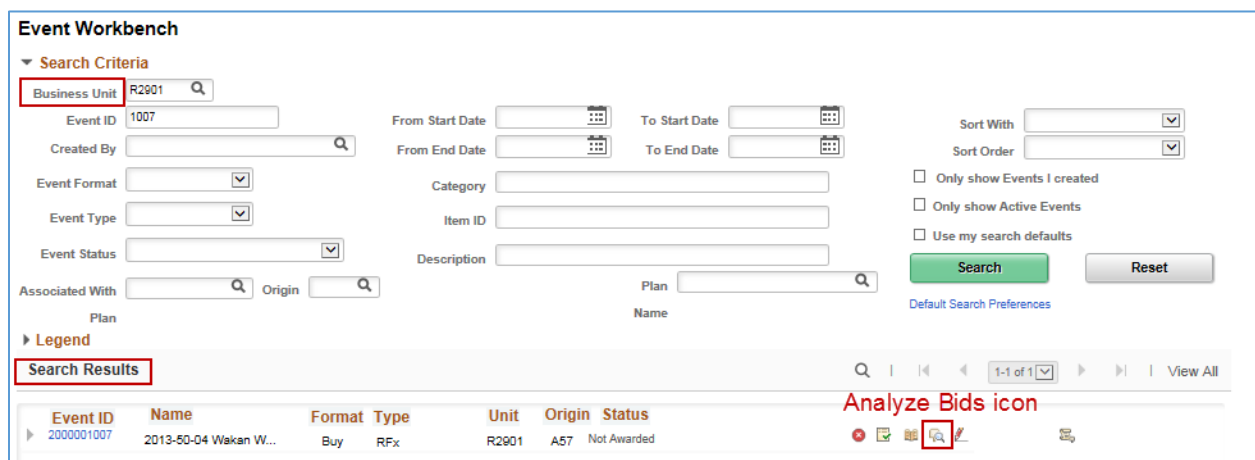
Steps to export bids for analysis on an event

Step 1: Access the event in the Event Workbench

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

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Maintain Events, Event Workbench page.

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



3. SWIFT displays the event on the **Search Results** section. Select the **Analyze Bids** icon for that event.
4. SWIFT brings you to the **Analyze Total** page for that event.

Step 2: Access the Bid Analyze Export page and set up the export

1. On the header of the **Analyze Total** page, use the **Go To** menu and select “Analyze Export”.

SWIFT displays the **Bid Analysis Export** page for that event. The export file contains all data from the header and lines of an event.

2. Select recipients for the export.
 - In the **Analysis Export File Recipients** section, SWIFT lists the event buyer as the recipient of the file.
 - To add additional recipients, select the **Add a Row** icon. Enter the user name. SWIFT will populate their email address if they are a SWIFT user. Enter the name and email address if you are sending to a non-SWIFT user.

3. As an option, you can filter the bids. For example, you can filter out bidders who you already rejected because of an incomplete response.

Use the **Filter Bids** section to customize the display of the exported bids. SWIFT defaults with all filters turned on, which will show the bid information for all bidders, regardless of their bid status. Update your selections as needed.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Filter Bids

Select the bids you want to include in your Analysis Export file.

Award Counter Disallow Reject <No Action>

Display Disqualified Bids Display Withdrawn Bids

Filter Bid Responses

Display Delta Responses

[Return to Analyze Event](#)

If you check the **Display Delta Responses**, SWIFT will show answers to general questions that are different. SWIFT will exclude answers that are the same for each bidder. If unchecked, all answers to the general questions will be displayed for each bidder.

4. Create the event analysis export document.
 - Press the **Create Analysis Export** button.

SWIFT creates the **Bid Analysis Export** file.

- SWIFT displays a message that says the export has been submitted.

[Return to Analyze Event](#)

i The process to create the bid analysis export has been submitted and will complete in a few minutes. Once complete an email containing the export file will be sent to the email addresses that have the notify flag checked. If the email is not received in a few minutes, please contact your system administrator.

Step 3: Save the document on your desktop

SWIFT sends an email to all listed recipients. It includes a file attachment with the export document.

Event Analysis Export Notification

To .

i If there are problems with how this message is displayed, click here to view it in a web browser.

Message

m MINNESOTA

Event Analysis Export Notification

Event Details

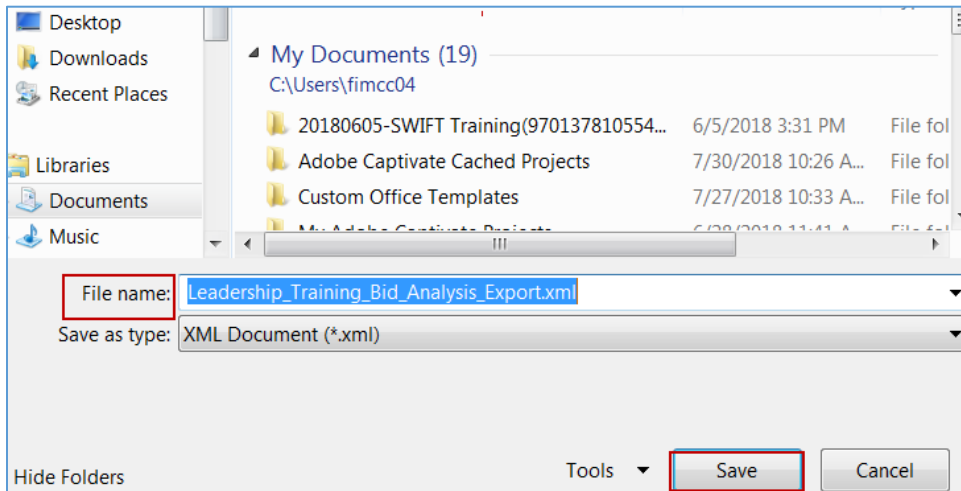
The event analysis for the following event has been exported into XML format and is attached below.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

1. Open up and then save the document.

Right click the file from the email and choose the **Save As** option.

2. SWIFT opens up your desktop.
 - In the *File Name* field, create a name that describes the event.
 - Save it on your computer.
 - Press the **Save** button.

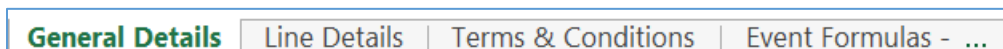


Step 4: Open the document from your desktop

1. Go to your desktop. To open the file, closely follow these instructions to make sure you can open it up in Excel.
 - Open Microsoft Excel. At the top, select **File->Open**. Navigate to this file, press it and select "Open".
 - Right click on this file and select "Open With".
 - Then, select Microsoft Excel as the application to open it with.
 - **NOTE:** When right clicking on the file if there is no "Open With" option, then try holding the shift button while right clicking on the file.

Excel displays the **Event Analysis** report in Excel. The four different tabs display the following information

- **General Details:** Header level bid information.
- **Line Details:** Line level bid information.
- **Terms & Conditions:** General terms and conditions for the event.
- **Event Formulas:** Do Not Change these formulas.



- a. On the **General Details** tab, review header level bid responses. Depending upon how many header bid factors your agency selected for this event, this document can be several pages long.

Event Analysis

State of Minnesota Report Date: 12/31/2018 09:44 AM CST

Event ID	Format	Type	Round	Version
R2301-2000008884	Buy	RFx	1	1
Event Name Leadership Training				
Start Time		Finish Time		
12/27/2018 02:47 PM CST		12/28/2018 07:25 AM CST		

Event Currency: US Dollar
Bids Allowed in Other Currency: No
Factor General Score into Line Score: No
Included Bids: All
Highlight Delta Response: Yes

Event Description
Leadership

Bidder Name	TEST	THINK GREAT LLC	3M CO ST PAUL
Event Version:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	8500	8500	10000
Total Event Score:	99.42	99.41	84.5
Total Header Score:	0	0	0
Award By Percent			

General Questions General Weighting: **0.00%**

Question UDM Best Worst Weighting

Comments/Attachments related to these responses can be found by clicking the Resp Comments/Attachments link

b. Select **Line Details** tab to review the line bid details. Depending upon how many line bid factors your agency selected for this event, this document can be several pages long.

Event Analysis

State of Minnesota Report Date: 12/31/2018 09:44 AM CST

Event ID	Format	Type	Round	Version
R2301-2000008884	Buy	RFx	1	1
Event Name Leadership Training				
Start Time		Finish Time		
12/27/2018 02:47 PM CST		12/28/2018 07:25 AM CST		

Event Currency: US Dollar
Bids Allowed in Other Currency: No
Factor General Score into Line Score: No
Included Bids: All
Highlight Delta Response: Yes

Bidder Name	TEST	THINK GREAT LLC	3M CO ST PAUL
Event Version:	1	1	1
Bid Number:	1	1	1

Line Details

Line: 1 **Item ID:** Line Quantity: 1 **Weighting:** **50.00%** Line Bid Quantity: 1 1 1

Bid Required: No **Reserve Price:** No **Total Line Bid Amount:**

Description: Supervision Basics **Total Line Score:**

	4300	4250	5000
	98.84	100	85

Comments
- Provide details of the training including the outcomes, lesson plans, length of training, etc.

Price Details	Worst	Weighting
What is the price per unit?	1000	100.00%

Quantity Details	Requested
Minimum Quantity:	0
Unit of Measure:	EA

Unit Bid Price:	4300	4250	5000
Score:	98.84	100	85
Minimum Quantity:	0	0	0
Bid Unit of Measure:	EA	EA	EA
Conversion Rate:	N/A	N/A	N/A
Award By Percent			
Award Quantity			

c. Press the **Terms & Conditions** tab. This page shows the summary of the Terms & Conditions page.

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Event Currency: US Dollar
Bids Allowed in Other Currency: No
Factor General Score into Line Score: No
Included Bids: All
Highlight Delta Response: Yes

Terms & Conditions

1. Please review the attached Terms and Conditions attached to the event.

You have successfully exported bids for analysis on an event.