

## Strategic Sourcing Quick Start Guide

September 1, 2019

Starting in December 2019, there will be changes to SWIFT. While the new version will have a new look and feel, this upgrade will not affect how most processes are completed in SWIFT.

**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).

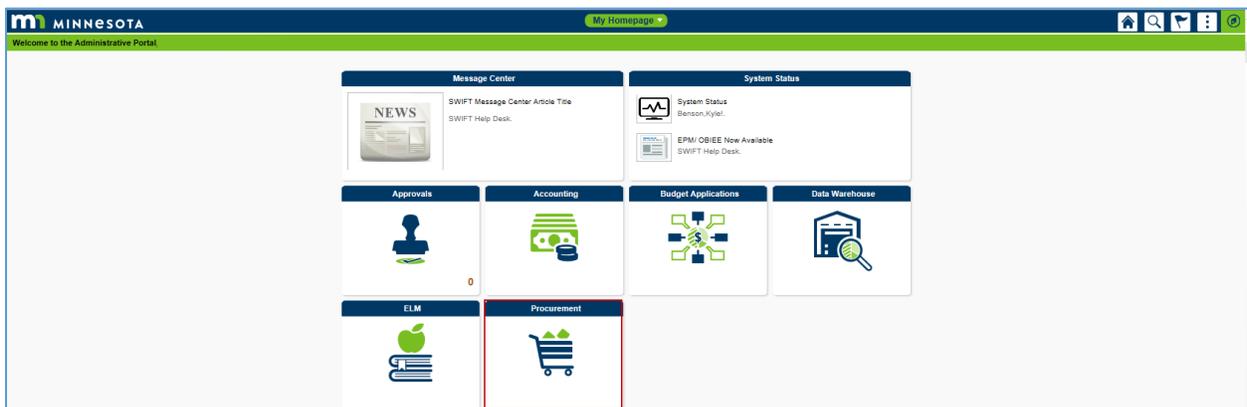
This guide introduces you to the Strategic Sourcing module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles. This guide shows the navigation path to the Create Event and Maintain Event pages.

The upgraded version of SWIFT organizes the options based on the navigation collection, which is the links to commonly used features for the module. You'll find them on the left menu.

- Step 1: Navigate to the Strategic Sourcing module
- Step 2: View the Create Events page to see how it is organized
- Step 3: View the Maintain Events (i.e., Event Workbench) page to see how it is organized

### Step 1: Navigate to the Strategic Sourcing module

1. From **My Homepage**, select the **Procurement** tile.



2. On the **Procurement** tile, select the **Strategic Sourcing** tile.



3. On the **Strategic Sourcing** page, you can see options.



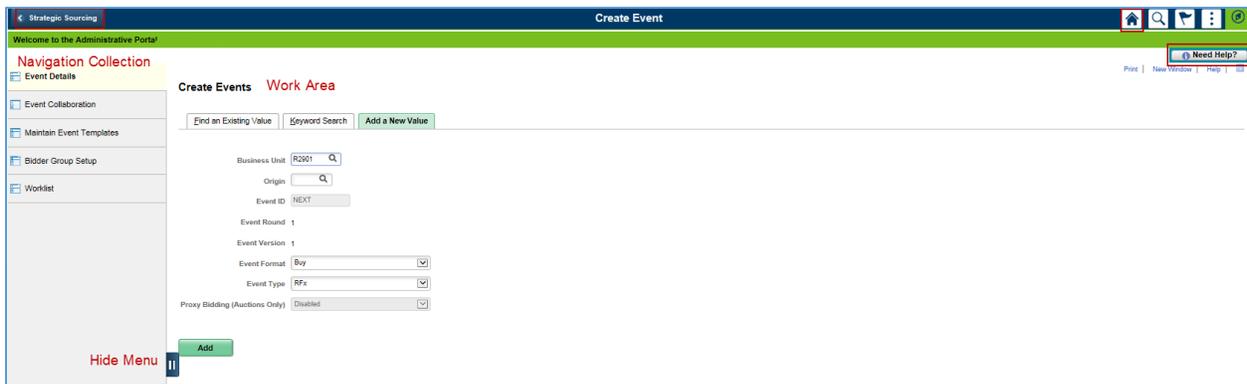
- Review a description of the tiles on the **Strategic Sourcing** page.

Tiles	Description of Tiles
<b>Contract / Sourcing WorkCenter</b>	This page provides a centralized place to access frequently used pages, queries, processes, and reports related to both contracts and events.
<b>Create Event</b>	Event administrators use this page to create and process events into collaboration and approval.
<b>Event Responses</b>	Use this page to enter a bidder response (e.g., bid on behalf of a bidder) and to search bidder activity.
<b>Maintain Events</b>	This page brings you to the Event Workbench.
<b>Reports</b>	<ul style="list-style-type: none"> <li>• <b>Awarded Events:</b> Allows you to set up and use a Run Control ID to set up report parameters based on Business Unit (range), Event ID (range), Event Procurement Type and Date (range).</li> <li>• <b>Workflow Approval Time Report:</b> Allows you to set up and use a Run Control ID to set up report parameters on Workflow Approval time. You can see who approved an individual event or group of events. Uses the Process Monitor and Report Manager.</li> </ul>

- Select the **Create Event** tile to view the **Create Events** page.
- Or, select the **Maintain Event** tile to view the **Event Workbench** page.

## Step 2: View the Create Events page to see how it is organized

1. Review the **Create Events** page.
  - **Navigation collections** are on the left menu of the page. You can hide this menu as needed.
  - The center of the page is the **work area**. This is where you will create and process events.
  - The **Need Help** button allows you to find Quick References guides for this module. It also brings you to the Query Viewer for running reports.
  - Use the back button on the left of the top menu to return to previous pages.
  - Use the **Home** button on the top menu to return to your **My Homepage**.



2. Review a description of the Navigation Collection.

Navigation Collection	Description of Folders and Pages
<b>Event Details</b>	Use this page to create and process new events (Add a New Value tab) and to update and process existing events (Find an Existing Value tab).
<b>Event Collaboration</b>	Use this search tool to find events where your agency set up collaborations.
<b>Maintain Event Templates</b>	Event creators can set up an event template for a standard event in SWIFT’s Strategic Sourcing module. SWIFT will copy over the event settings, comments and attachments, line items, bid factors, invited bidders, event name and event description. The ability to create event templates is based on an individual’s security profile.
<b>Bidder Group Setup</b>	When you create any type of strategic sourcing event, you can invite bidders to view and participate in it. You can save these bidders into a bidder group for use on future events. Find bidder groups on this page.
<b>Worklist</b>	A worklist is an organized list of the work items that need to be addressed.

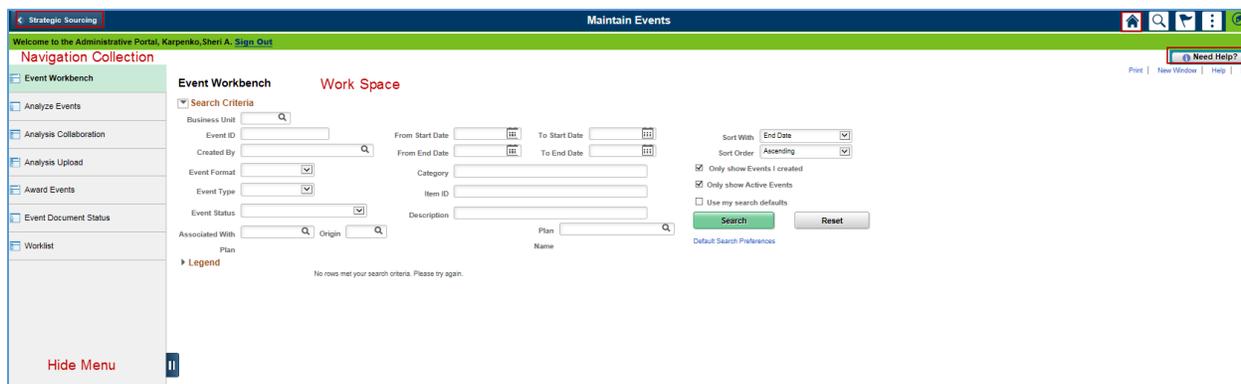
## Step 3: View the Maintain Events page to see how it is organized

1. Review the **Maintain Events** page.

This is also the Event Workbench.

- **Navigation collections** are on the left menu of the page. You can hide this menu as needed.
- The center of the page is the **work area**. This is where you will create and process events.
- The **Need Help** button allows you to find Quick References guides for this module. It also brings you to the Query Viewer for running reports.
- Use the back button on the left of the top menu to return to previous pages.
- Use the **Home** button on the top menu to return to your **My Homepage**.

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Navigation Collection	Description of Folders and Pages
<b>Event Workbench</b>	The Event Workbench in SWIFT’s Strategic Sourcing module functions as a “one-stop shop” and allows agencies to easily monitor and manage events. If you are managing multiple events at the same time, track them from the Event Workbench. You can only view and manage events by Business Unit and Origin that you are authorized to view and manage.
<b>Analyze Events</b>	Search tool that brings you to a list of events that were analyzed in SWIFT.
<b>Analysis Collaboration</b>	SWIFT is not currently using this feature.
<b>Analysis Upload</b>	SWIFT is not currently using this feature.
<b>Award Events</b>	Search tool that brings you to a list of events that were posted, awarded, pending award or canceled in SWIFT.
<b>Event Document Status</b>	Search tool that shows you individual documents associated with that event such as a purchase order, requisition or contract.
<b>Worklist</b>	A worklist is an organized list of the work items that need to be addressed.