

## QUICK REFERENCE GUIDE

### *Viewing Invitations and Accepting/Declining an Event*

*January 30, 2014*

The State of Minnesota government is a very complex system with many different agencies conducting business each day. When required by laws, guidelines or regulations, purchases on behalf of the state must be done through a competitive process known as **bidding**. This is done in order to ensure purchasing is done in the best interest of the state, state taxpayers, and equitably for vendors.

In the state's financial and procurement system, **SWIFT**, this process is initiated through a document known as an **event**. This is more commonly known as a solicitation, but that terminology is not used in SWIFT.

Individuals and businesses interested in participating in these events are able to do so by using the **Supplier Portal** to review existing events and submit their responses. A response in SWIFT is referred as a **bid** even if the event is requesting a proposal or information only.

Events are also used for state agencies who are offering outgoing grants to businesses or individuals. Even though you are submitting a proposal to receive money from the state, SWIFT still refers to your response as a bid. SWIFT will also refer to you as a **vendor** even though you are receiving funds and not providing goods or services.

There are three different basic types of events:

- RFB-Request for Bid
  - RFBs are generally used to procure goods or standard services.
- RFP-Request for Proposal
  - RFPs are generally used for professional or technical services or with outgoing grants.
- RFI-Request for Information
  - RFIs are much less formal and generally used with professional/technical services or outgoing grants in the beginning stages of a project to solicit general information.

## **Viewing Invitations and Accepting/Declining an Event**

When a managing agency creates an event, they have the option to invite specific vendors they think may be interested in submitting a response or hearing about the event. When this happens, you the vendor will receive an email notification (sent to the contact on record) and can also view any invitations through the SWIFT Supplier Portal.

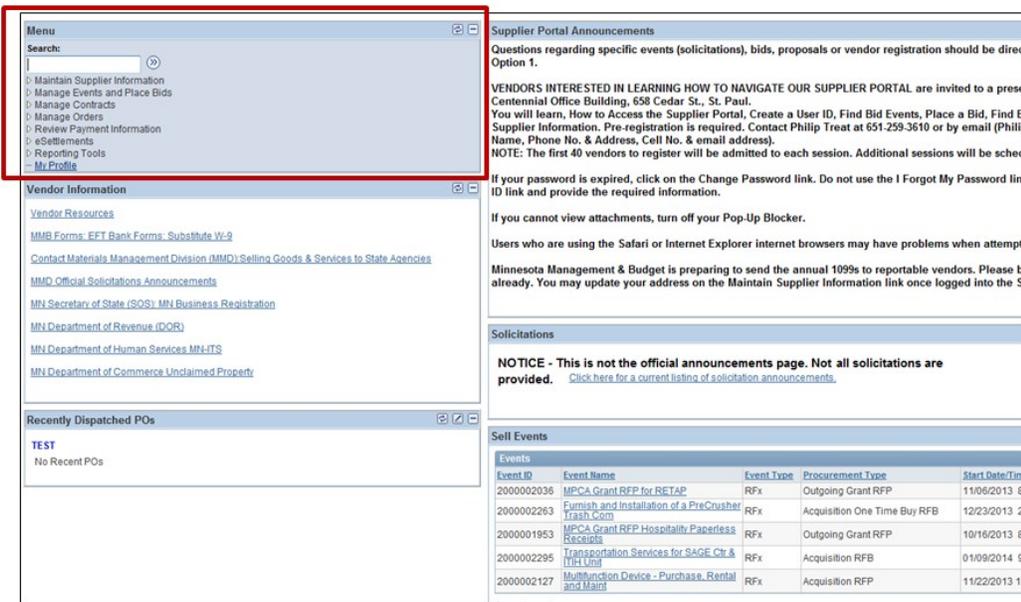
When you are invited to an event, you can indicate your interest in it by accepting the invitation, or declining it. This will inform the managing agency of your intentions with the event. You can also accept or decline an event to which you have not been invited using the same process. You must be registered as a vendor with the state in order to be invited to participate in an event.

## **Viewing Events to which you have been Invited**

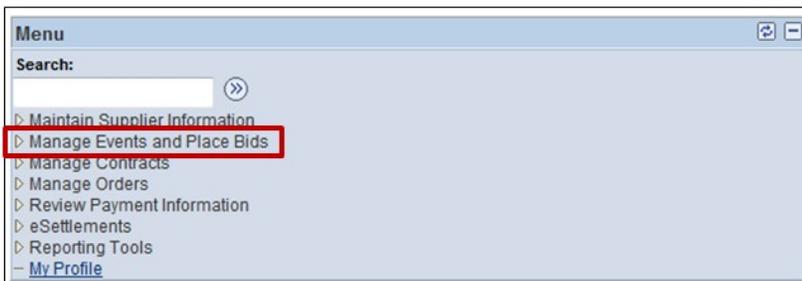
1. Begin by navigating to the SWIFT Supplier Portal: <http://supplier.swift.state.mn.us>
2. Login using your User ID and Password received when you registered as a vendor with the state



1. Locate the main navigation menu on the home page.



2. Click *Manage Events and Place Bids*



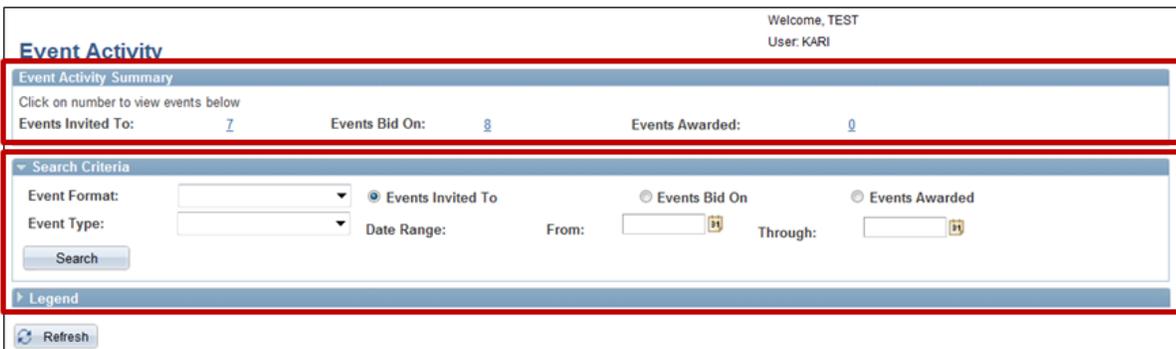
1. Click My Event Activity



This brings you to the *Event Activity* search page. Across the top in the *Event Activity Summary*, there is a count of how many total events you have been invited to, how many total events you have bid on, and how many total events you have been awarded. You can click on the number for any of these to see a full list of the applicable events.

Below that in the *Search Criteria* section, you can narrow the range of events you are looking at.

2. Enter your search criteria
  - a. Event Format
    - i. Select "RFI" to view any RFI events you have been invited to or participated in
    - ii. Select "Sell" to view any RFB or RFP events you have been invited to or participated in
  - b. Event Activity
    - i. Select one of the three radio buttons to view a group of events
      1. *Events Invited To*: View events to which you have been invited
      2. *Events Bid On*: View events for which you have submitted a response
      3. *Events Awarded*: View events you have been awarded
  - c. Event type
    - i. Select "RFx" for all state events
  - d. Date Range
    - i. *From*: Search for events with a start date after this date
    - ii. *Through*: Search for events with a start date before this date
3. Click **Search**



3. Review your search results
4. Click the link in the *Event ID* column for additional details about the event

**Search Criteria**

Event Format:   Events Invited To  Events Bid On  Events Awarded

Event Type:  Date Range: From: 01/01/2014  Through:

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**Legend**

Events Find First 1-3 of 3 Last

Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
<a href="#">G0211-2000002283</a>	Sell	RECS RFP Study Facility Expansion-MCF, Shakopee	Posted	01/29/2014 4:00PM CST	02/05/2014 12:00PM CST	
<a href="#">G0211-2000002323</a>	Sell	RFP RECS Design MDH Lab Heat Wheel Replacement	Posted	01/27/2014 3:00PM CST	01/31/2014 12:00PM CST	
<a href="#">R2901-2000002316</a>	Sell	DNR RFP PT VET FOR MOOSE STUDY	Pending Award	01/15/2014 8:00AM CST	01/23/2014 1:10PM CST	

[Return to Event Search](#)

After clicking the *Event ID* link, you are brought to the *Event Details* overview page. Here you can see limited details about the event. You are not able to view any attachments from here, and in order to continue and see more details about the event you must be registered as a vendor with the state and logged in.

## Accepting an Event

Accepting an event indicates to the managing agency your intention to participate in an event. If you have been invited to an event, it is not necessary to accept before you submit your response as you will automatically receive updates and notifications about the event, but you can do so if you wish.

If the event is public and you were not invited, you may want to accept in order to receive any notifications or changes about the event.

1. Locate the event from the *My Event Activity* page or *View Events and Place Bids* search page
2. Review Details of the event
  - a. *Event Name*: Identifies the name of the event as assigned by the managing agency
  - b. *Event ID*: Identifies the specific SWIFT agency ID and ID number of the Event
  - c. *Event Format/Type*: Identifies the event as an RFB/RFP (Sell) or RFI
  - d. *Procurement Type*: Identifies the type of item being solicited with this event
  - e. *Event Round and Version*: Displays the current round and version of the event you are viewing
  - f. *Event Start Date*: Date and time the event was made available to be bid upon
  - g. *Event End Date*: The date and time the event closed to receiving bids
  - h. *Click here to view the General Terms and Conditions*: Review the general conditions for the event
  - i. *Event Description*
    - i. This field is populated with information entered by the managing agency regarding specifications and details about the event.  
**Note:** It is very important to review the details in this field as they may contain directions and information about how to respond as well as key details about the event.
  - j. *Contact, Phone, Fax, Email, View Address*: Contact information for the event manager
    - i. If you have specific questions about the details of the event, contact this individual
    - ii. General questions regarding the event process or technical issues should be directed to the vendor help line.
  - k. *Live Chat Help*: Not used by the state
  - l. *Payment Terms*: Specified by the managing agency and may or may not be included
  - m. *My Bids*: If you have previously submitted or started and saved a response to this event, a link will be given to view that response

n. *Edits to Submitted Bids*: Indicates if you are allowed to change your bid after it has been submitted

**Note:** If edits are allowed, you can only do so until the event end date is reached. See the **Responding to an Event/Solicitation** QRG for more information

o. *Multiple Bids*: Indicates if you are allowed to submit multiple bids; also called alternative bids

p. *Lines*

- i. *Description*: Overview of item being solicited as provided by the managing agency
- ii. *Requested Quantity*: Quantity being requested
- iii. *Line Comments/Attachments*: Additional details about the line

**Event Details**
Welcome, KARI  
User: KARI

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Information On Inquiry Options

Accept Invitation

Click the Accept invitation button to designate your desire to participate in the event.

Decline Invitation

Click the Decline invitation button if you do not wish to participate in or receive notifications regarding this event.

View Event

Click the "View Event" button to view event details or to begin the bidding process.  
NOTE: Your bid will not be submitted for consideration until clicking the "Submit Bid" button located on the bottom of the Event Details page accessed when clicking the "View Event" button.

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Event Name: RECS RFP Study Facility Expansion-MCF, Shakopee

Event ID: G0211-2000002283

Event Format/Type: Sell Event

Procurement Type: Professional Tech/Services RFP

Event Round: 1      Event Version: 1

Event Start Date: 01/29/2014 4:00PM CST

Event End Date: 02/05/2014 12:00 PM CST      [Click here to view the General Terms and Conditions](#)

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Event Description:

Please see Addendum #1

RECS Project #78SH0022 - RFP for Study of 30-year Master Plan for Facility Expansion, Minnesota Correctional Facility, Shakopee, MN. See attached RFP for additional details.

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Contact: Grochowski, Kathleen A      [View Address](#)      Payment Terms:

Phone: 651/201-2389      My Bids: 0

Fax:      Edits to Submitted Bids: Allowed

Email: [kathy.grochowski@state.mn.us](mailto:kathy.grochowski@state.mn.us)      Multiple Bids: Not Allowed

[Discuss Event in Forum](#)

Live Chat Help:

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Legend: ★ Denotes a question where a response is required. Your bid cannot be submitted if a response is not provided.      [Line Comments/Files](#)

Line	Description	Requested Quantity	Status	
1	★ 78SH0022 Study Facility Expansion	See Price Schedule		<a href="#">Line Comments/Files</a>

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[Search Events](#)

Expert Entry

At the top of this page are three buttons which are an opportunity to indicate your intentions for this event. This is an optional step. If you wish to neither accept nor decline, you can continue to view the full details of the event by clicking **View Event**. If you choose this option and continue to submit a response, the event will automatically be considered accepted once a response is saved.

1. Click **Accept Invitation**

**Information On Inquiry Options**

**Accept Invitation** Click the Accept Invitation button to designate your desire to participate in the event.

**Decline Invitation** Click the Decline Invitation button if you do not wish to participate in or receive notifications regarding this event.

**View Event** Click the "View Event" button to view event details or to begin the bidding process. NOTE: Your bid will not be submitted for consideration until clicking the "Submit Bid" button located on the bottom of the Event Details page accessed when clicking the "View Event" button.

You are returned to the *View Events and Place Bids* search page and can continue with additional activities in the supplier portal as necessary.

**View Events and Place Bids** Welcome, TEST  
User: KARD

Enter search criteria to locate an event for viewing or placing bids.

**Search Criteria**

Use Saved Search:

Business Unit:

Event ID:

Event Name:

Event Type:

Event Status:

Buyer:

Procurement Type:

Include Declined Invitations?

**Results Should Include:**

- Sell Event
- Purchase Event
- Request For Information

[Manage Saved Searches](#) [Save Search Criteria](#) [Advanced Search Criteria](#)

[Search Results](#)

If you return to the same event, notice the option to accept the event is no longer available since that action has already been done, but you can choose to decline at any point until the event end date and time if you wish.

**Event Details** Welcome, KARI  
User: KARI

**Information On Inquiry Options**

**Decline Invitation** Click the Decline Invitation button if you do not wish to participate in or receive notifications regarding this event.

**View Event** Click the "View Event" button to view event details or to begin the bidding process. NOTE: Your bid will not be submitted for consideration until clicking the "Submit Bid" button located on the bottom of the Event Details page accessed when clicking the "View Event" button.

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**Event Name:** RECS RFP Study Facility Expansion-MCF, Shakopee

**Event ID:** G0211-200002283

**Event Format/Type:** Sell Event

**Procurement Type:** Professional Tech/Services RFP

**Event Round:** 1 **Event Version:** 1

**Event Start Date:** 01/29/2014 4:00PM CST

**Event End Date:** 02/05/2014 12:00 PM CST [Click here to view the General Terms and Conditions](#)

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**Event Description:**

Please see Addendum #1

RECS Project #T8SH0022 - RFP for Study of 30-year Master Plan for Facility Expansion, Minnesota Correctional Facility, Shakopee, MN. See attached RFP for additional details.

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**Contact:** Grochowski, Kathleen A [View Address](#)

**Phone:** 651/291-2389

**Fax:**

**Email:** [kathy.grochowski@state.mn.us](mailto:kathy.grochowski@state.mn.us) [Discuss Event in Forum](#)

**Live Chat Help:**

**Payment Terms:**

**My Bids:** 0

**Edits to Submitted Bids:** Allowed

**Multiple Bids:** Not Allowed

You are not under any obligation to submit a response after you have accepted an invitation or a public event; it is just a method to ensure you will receive updates and notifications pertaining to the event.

## Declining an Event

Declining an event indicates to the managing agency you do not wish to participate in an event. If you have been invited to an event, you may wish to decline so you can stop receiving notifications and updates about the event, or you may wish to decline so you can record the reason why you are choosing not to submit a response in order to maintain a state or federal preference or certification. Public events you have not been invited to can also be declined if you wish.

1. Locate the event from the *My Event Activity* page or *View Events and Place Bids* search page
2. Review Details of the event

The screenshot shows the 'Event Details' page for a user named KARI. At the top right, it says 'Welcome, KARI' and 'User: KARI'. Below this is a section titled 'Information On Inquiry Options' with three buttons: 'Accept Invitation', 'Decline Invitation', and 'View Event'. Each button has a corresponding instruction. The 'Decline Invitation' button is highlighted with a red box. Below this is a table of event details:

Event Name:	RFP RECS Design MDH Lab Heat Wheel Replacement		
Event ID:	G0211-2000002323		
Event Format/Type:	Sell Event		
Procurement Type:	Professional Tech/Services RFP		
Event Round:	1	Event Version:	1
Event Start Date:	01/27/2014 3:00PM CST		
Event End Date:	01/31/2014 12:00 PM CST <a href="#">Click here to view the General Terms and Conditions</a>		

Below the table is an 'Event Description' section with the text: 'RECS Project #02LB0010- RFP for Mechanical and Electrical Engineering Services for the design and installation of new Heat Recovery Wheel Medias for Fans S-1 and S-3 at MN Dept. of Health/Ag Lab Building, St. Paul, MN. See attached RFP for additional details.'

At the bottom, there is a 'Contact' section with the name 'Landucci Owen, Talia A', a 'View Address' link, and an email address 'Talia.Landucci-Owen@state.mn.us'. There is also a 'Payment Terms' section with 'My Bids: 0', 'Edits to Submitted Bids: Allowed', and 'Multiple Bids: Not Allowed'. A 'Live Chat Help' link is at the bottom left.

3. Click **Decline Invitation**

This is a close-up of the 'Information On Inquiry Options' section from the previous screenshot. The 'Decline Invitation' button is highlighted with a red rectangular box. The text next to it reads: 'Click the Decline Invitation button if you do not wish to participate in or receive notifications regarding this event.'

4. Select a reason for the decline as applicable
5. Enter any additional comments as desired

6. Choose whether or not you wish to continue to receive updates regarding the event
7. Click **Continue**

### Decline Event Invitation

Event ID: 2000002323    Name: RFP RECS Design MDH Lab Heat Wheel Replacement

**Please select a reason for declining this event invitation:**

- Cannot meet required due date
- Insufficient time to respond to event
- Unable to obtain the required insurance
- Cannot meet the licensing and/or cert. requirement
- Other
- Responder cannot meet specifications as outlined.

**Please enter any additional comments:**

**Do you wish to continue to receive updates on this event?**

Yes

No

[Return to Event Search](#)

You are returned to the *View Events and Place Bids* search page and can continue with additional activities in the supplier portal as necessary.

### View Events and Place Bids

Enter search criteria to locate an event for viewing or placing bids.

Welcome, TEST  
User: KARI

**Search Criteria**

Use Saved Search:

Business Unit:

Event ID:

Event Name:

Event Type:

Event Status:

Buyer:

Procurement Type:

Include Declined Invitations?

[Manage Saved Searches](#)    [Save Search Criteria](#)    [Advanced Search Criteria](#)

**Search Results**

Bus Unit-Event ID	Event Name	Format	Type	End Datetime	Status	Agency Description
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If you return to the same event, notice the option to decline the event is no longer available since that action has already been done, but you can choose to accept at any point until the event end date and time if you wish.

## Event Details

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[Information On Inquiry Options](#)

Accept Invitation

Click the Accept Invitation button to designate your desire to participate in the event.

View Event

Click the "View Event" button to view event details or to begin the bidding process. NOTE: Your bid will not submitted for consideration until clicking the "Submit Bid" button located on the bottom of the Event Details page accessed when clicking the "View Event" button.

Welcome, KARI

User: KARI

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<b>Event Name:</b>	RFP RECS Design MDH Lab Heat Wheel Replacement		
<b>Event ID:</b>	G0211-2000002323		
<b>Event Format/Type:</b>	Sell Event		
<b>Procurement Type:</b>	Professional Tech/Services RFP		
<b>Event Round:</b>	1	<b>Event Version:</b>	1
<b>Event Start Date:</b>	01/27/2014 3:00PM CST		
<b>Event End Date:</b>	01/31/2014 12:00 PM CST		<a href="#">Click here to view the General Terms and Conditions</a>

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**Event Description:**

RECS Project #02LB0010- RFP for Mechanical and Electrical Engineering Services for the design and installation of new Heat Recovery Wheel Medias for Fans S-1 and S-3 at MN Dept. of Health/Ag Lab Building, St. Paul, MN. See attached RFP for additional details.

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<b>Contact:</b>	Landucci Owen, Talia A	<a href="#">View Address</a>	<b>Payment Terms:</b>
<b>Phone:</b>	651/201-2372		<b>My Bids:</b> 0
<b>Fax:</b>			<b>Edits to Submitted Bids:</b> Allowed
<b>Email:</b>	<a href="mailto:Talia.Landucci-Owen@state.mn.us">Talia.Landucci-Owen@state.mn.us</a>		<b>Multiple Bids:</b> Not Allowed
	<a href="#">Discuss Event in Forum</a>		

**Live Chat Help:**

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