Statewide Integrated Financial Tools

QUICK REFERENCE GUIDE

Internal Collaboration on Contracts – Responding to Collaboration Requests

February 22, 2013

Introduction

Internal collaboration enables the Contract Administrator to solicit feedback and review from other state users. Contract Administrators can share the Contract Document with multiple users and can use collaboration multiple times to ensure the document's accuracy.

Collaboration can be done in two ways:

- Comment Only: This form of collaboration provides the state user the ability to view the Contract Document, and provide comments to the Contract Administrator via SWIFT.
- Edit Document: This form of collaboration allows the state user to check out the Contract Document to revise it as needed, and then upload it back into SWIFT.

As each collaborator completes their review of the Contract document, SWIFT notifies the contract Administrator via email. The Contract Administrator can wait until all collaborators have completed their review and then finalize the collaboration loop, or can choose to cancel collaboration if enough feedback has been received even though all collaborators have not responded.

This Quick Reference Guide presents the information necessary for those asked to collaborate to be able to complete this task.

Steps to Collaborate

- Contract Administrator routes the Contract Document for internal collaboration
- Internal collaborators receive notification via email and worklist
- Internal collaborators access the Document Management page in SWIFT
  - Internal collaborators view the document and provide feedback comments
  - If authorized by the Contract Administrator, internal collaborators edit the document
- Internal collaborators mark the document as reviewed
- Contract Administrator finalizes collaboration

SWIFT
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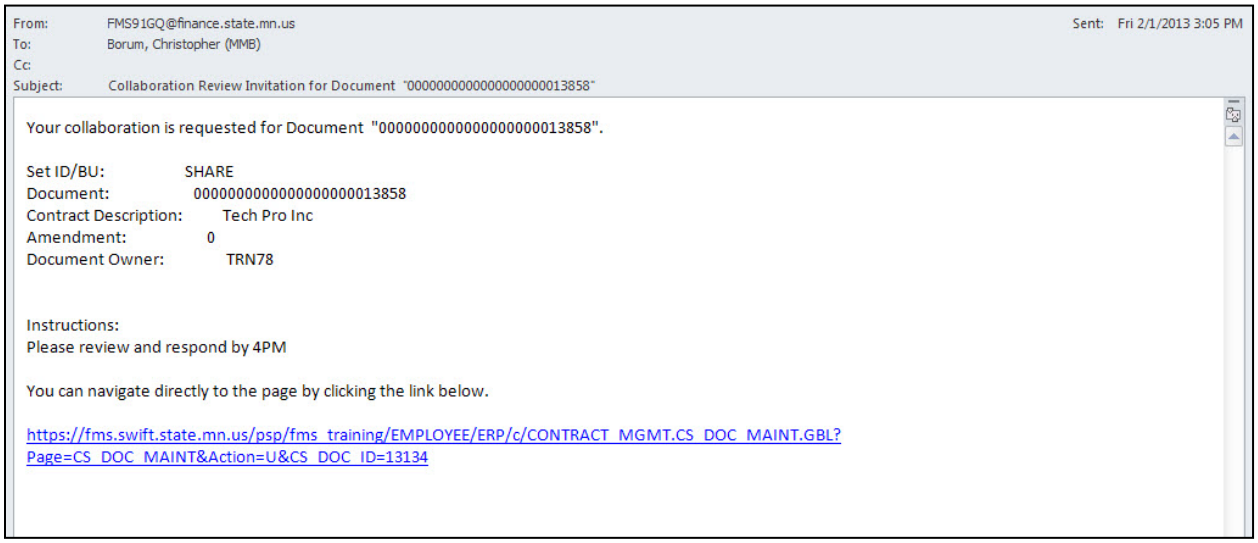
Internal Collaborators Receive Notification via Email or Worklist

Internal collaborators selected to participate in contract document collaboration receive an email notification. The notification email includes basic information about the contract document as well as a link to the SWIFT Portal.

Click the link in the email to display the login page for SWIFT or log in to SWIFT via a browser. Note that if you use the link in the email notification, you do not have to search for the document; the collaboration page displays automatically after you log in.


From: FMS91GQ@finance.state.mn.us
Sent: Fri 2/1/2013 3:05 PM
To: Borum, Christopher (MMB)
Cc:
Subject: Collaboration Review Invitation for Document "0000000000000000000013858"

Your collaboration is requested for Document "0000000000000000000013858".

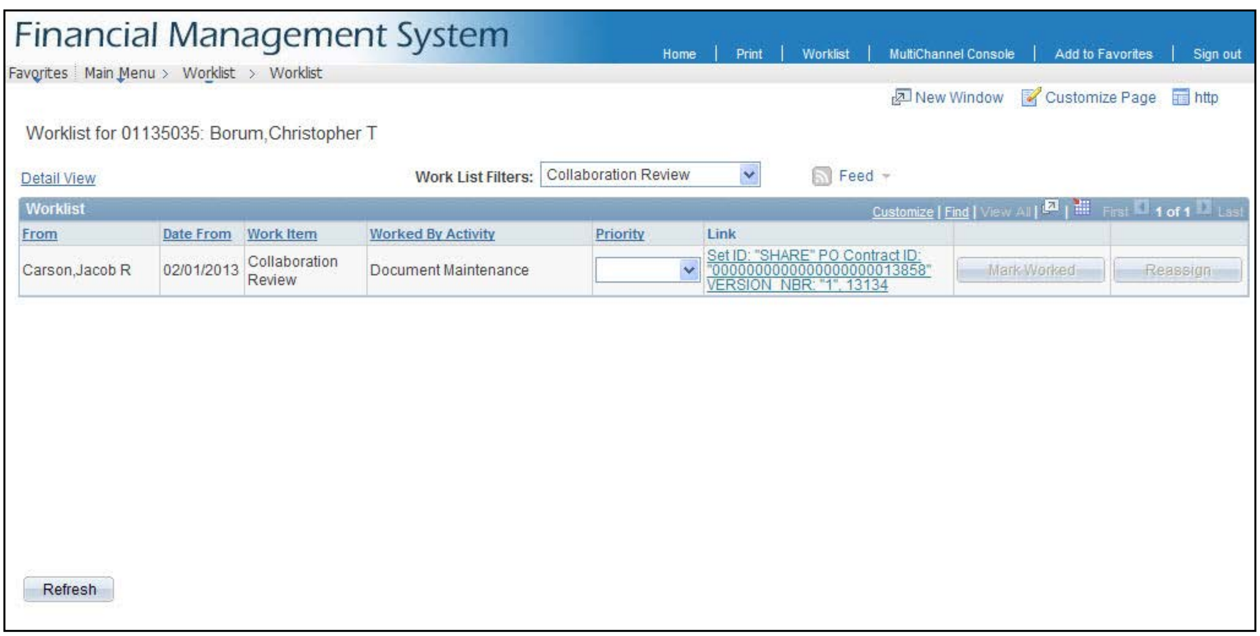
Set ID/BU: SHARE
Document: 0000000000000000000013858
Contract Description: Tech Pro Inc
Amendment: 0
Document Owner: TRN78

Instructions:
Please review and respond by 4PM

You can navigate directly to the page by clicking the link below.

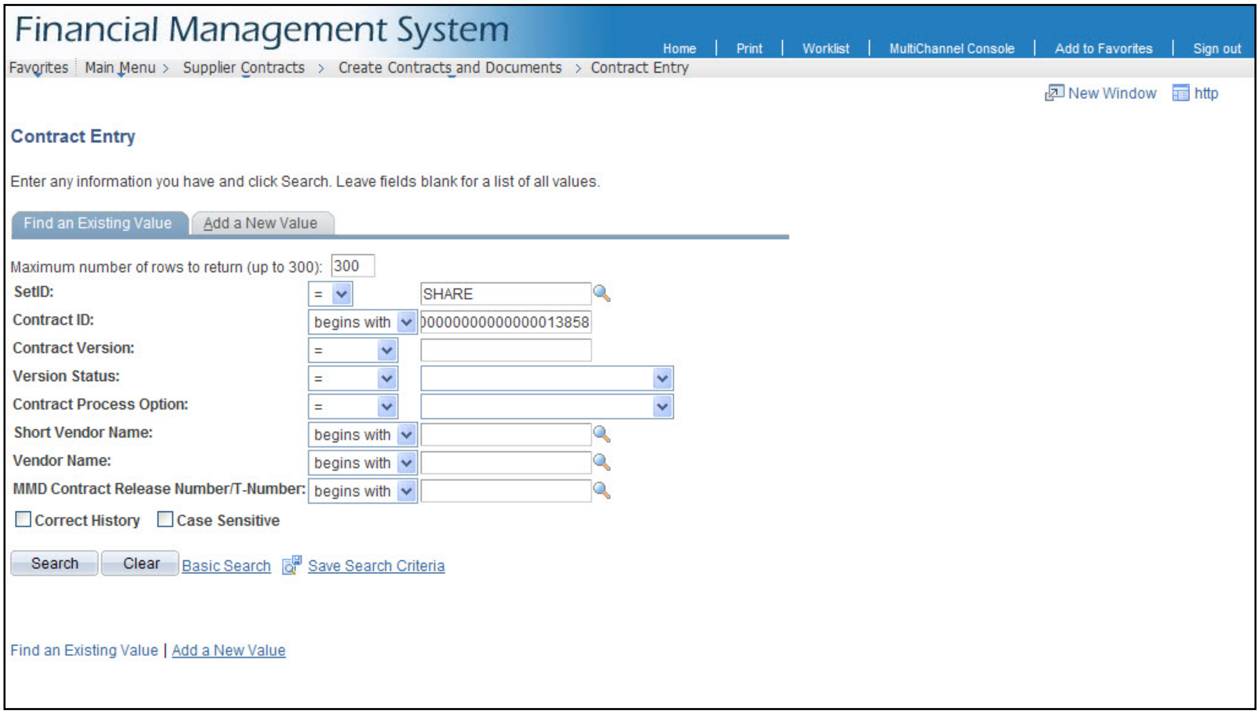
https://fms.swift.state.mn.us/psp/fms_training/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Page=CS_DOC_MAINT&Action=U&CS_DOC_ID=13134

Internal collaborators can also access the collaboration page using the link in their worklist.



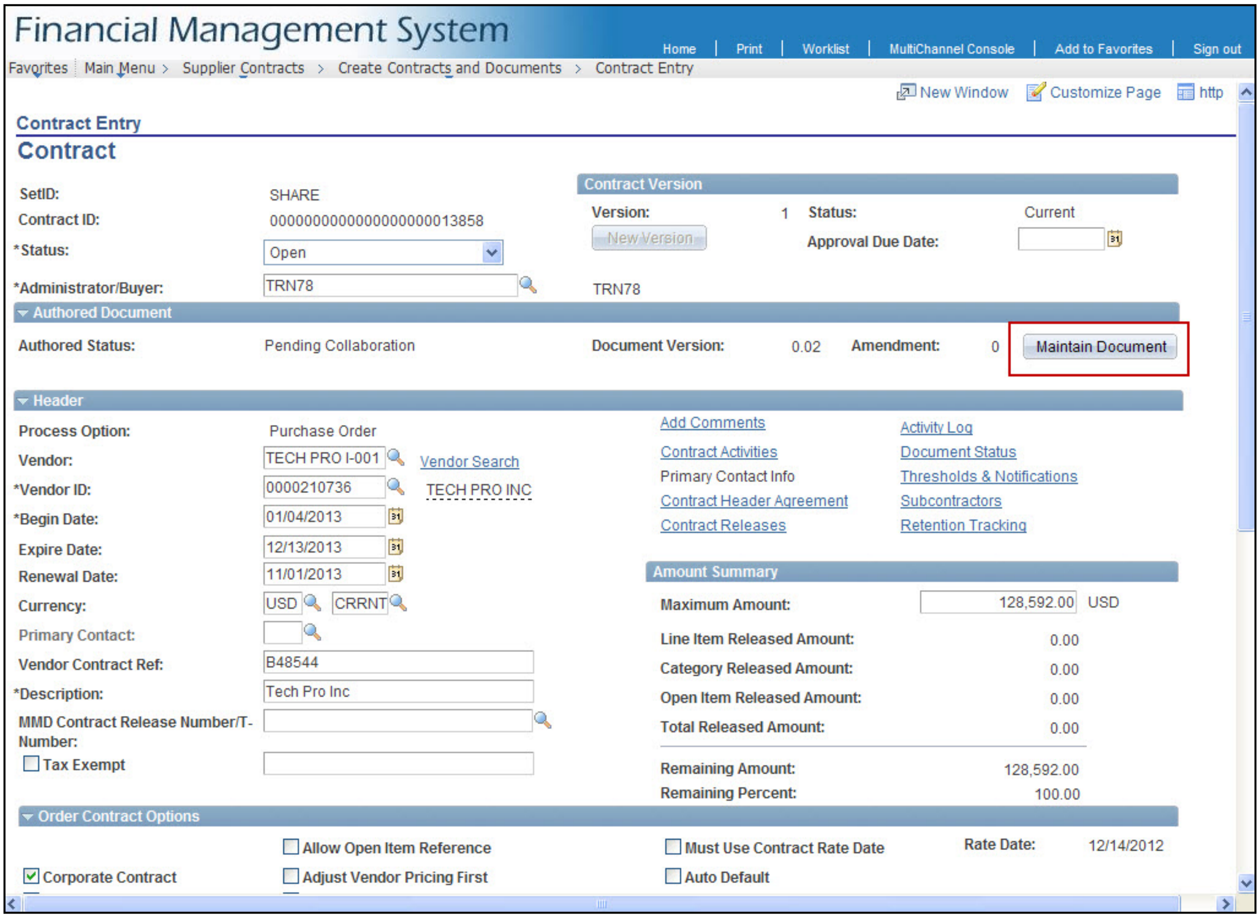
Search for Document

1. If you do not log in via the email notification link or the worklist, navigate to the *Document Management* page using this navigation:
   Main Menu, Supplier Contracts, Create Contracts and Documents, Contract Entry
2. Enter the Contract ID to search for.
3. Click **Search**.



4. SWIFT opens directly to the *Contract Entry* page if you enter the entire Contract ID. Otherwise, select the correct Contract ID from the list of search results.

5. On the Contract Entry page, click **Maintain Document**.



Collaborate

Complete your collaboration review on the *Document Management* page:

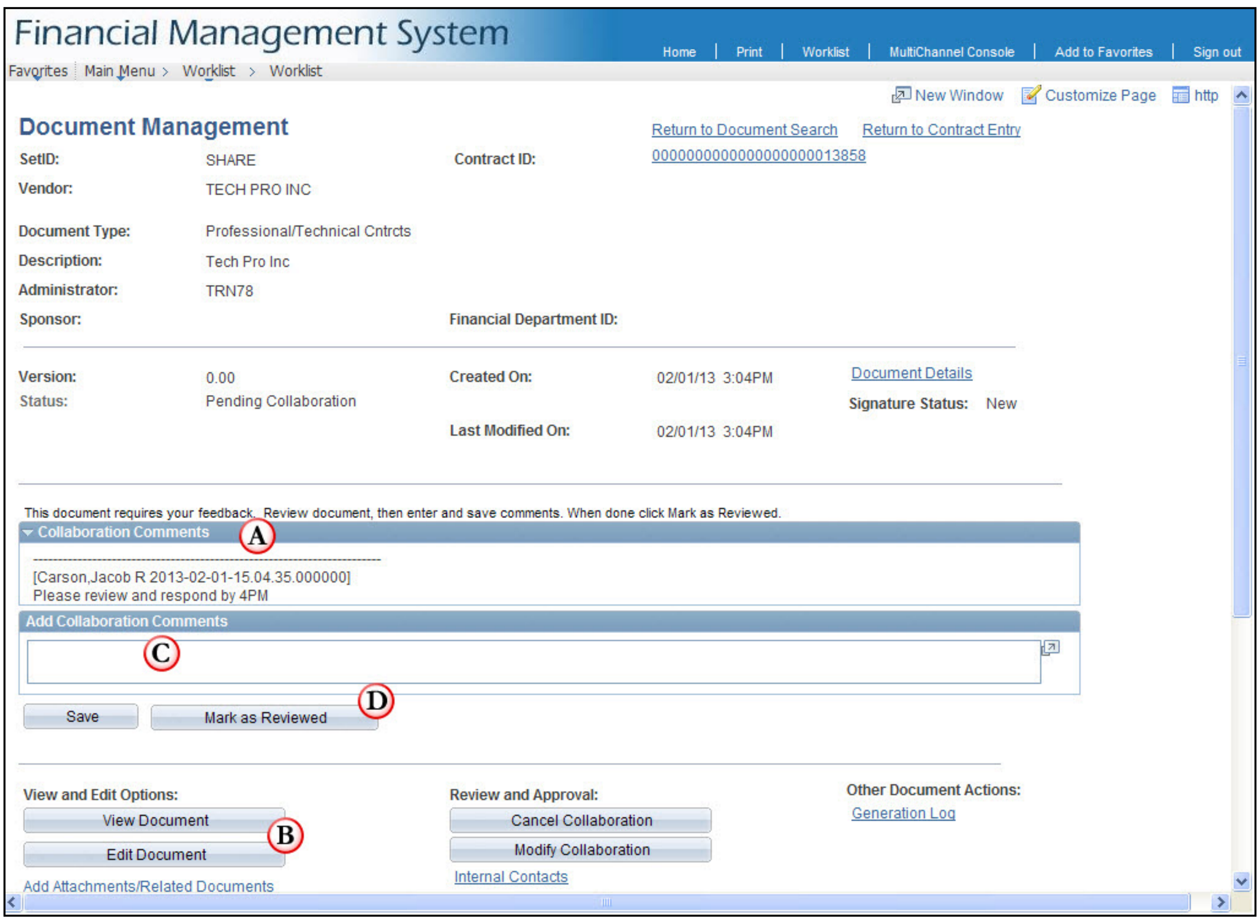
A) First, review the Contract Administrator’s instructions regarding the collaboration. You may be asked to review only a portion of the document.

B) Click **View Document** to open the document in Microsoft Word. Click **Edit Document** to check out a copy of the document for editing.

Note: SWIFT only displays the **Edit Document** button if you are authorized by the Contract Administrator to make changes to the document.

C) Enter any comments related to your review of the document. If you edited the document, be sure to comment on the changes made.

D) Click **Mark as Reviewed** to complete your collaboration review.



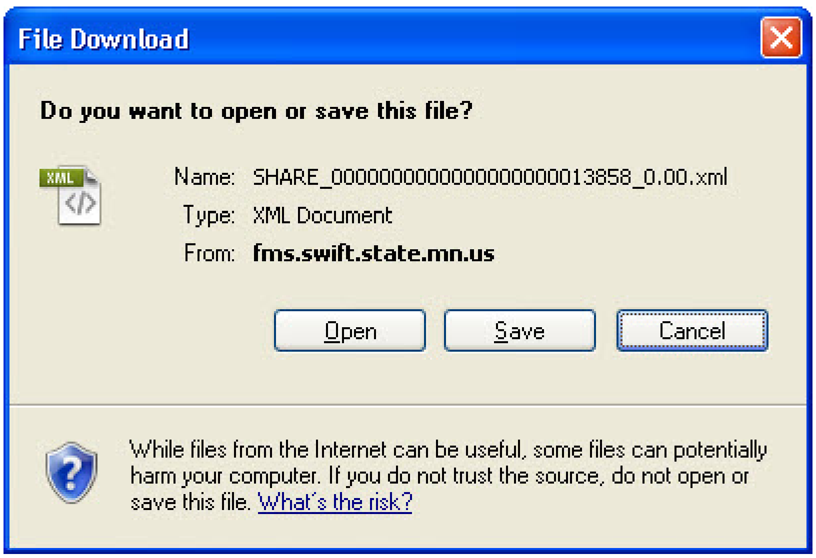
Editing Contract Documents

If you are authorized to edit the contract document, SWIFT includes the **Edit Document** button on the *Document Management* page. Click this button to open or save the document.

When you click Edit Document, SWIFT opens a dialog box asking if you want to open or save the document. You can usually click Open. SWIFT opens the document in Microsoft Word. If necessary, you can click Save and save the file to a folder where it can easily be found. Do NOT change the file name.

Note: The document is in XML format. Microsoft Word is usually the default editor for XML files. If you need to change the settings on your computer to edit XML files in Word automatically, refer to the Quick Reference Guide Setting Default to Word on XML Files, dated January 17, 2013.

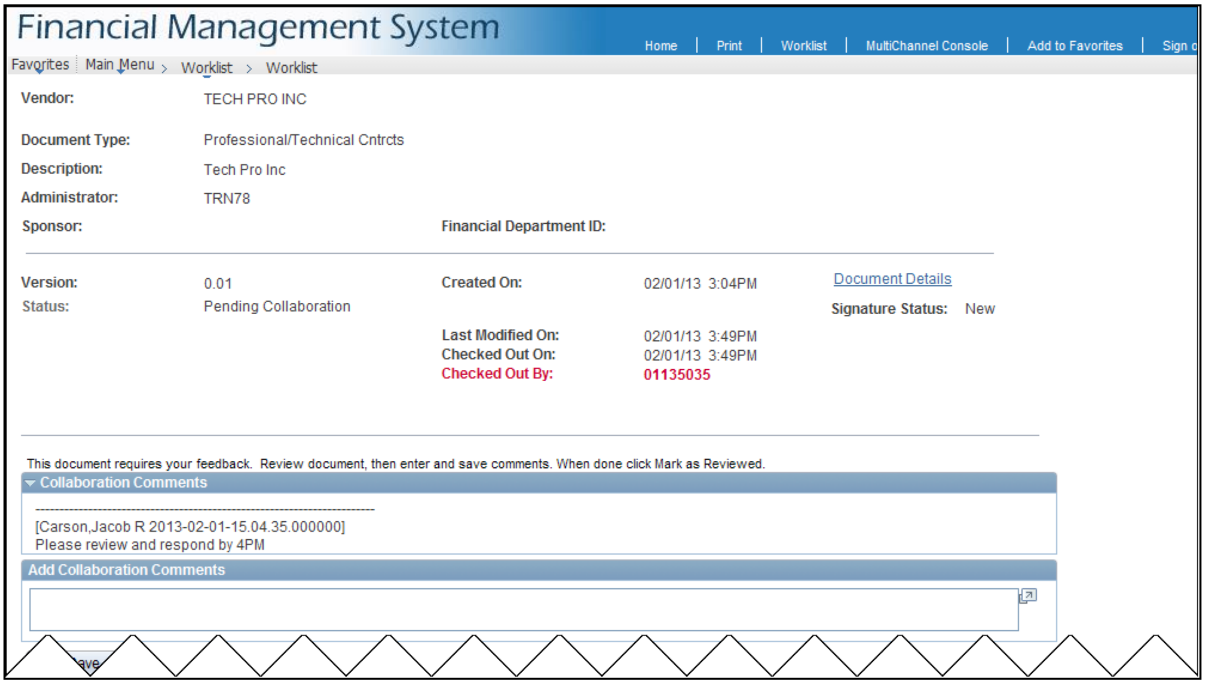
You should also create a folder to save these files in that is easy to locate. You should purge old documents periodically, as they will not be deleted otherwise. Remember that the document is retained electronically in SWIFT and you can always download it again. Alternatively, you could move older documents to an archive folder for easy recall.



<u>Open or Save a document for editing?</u>

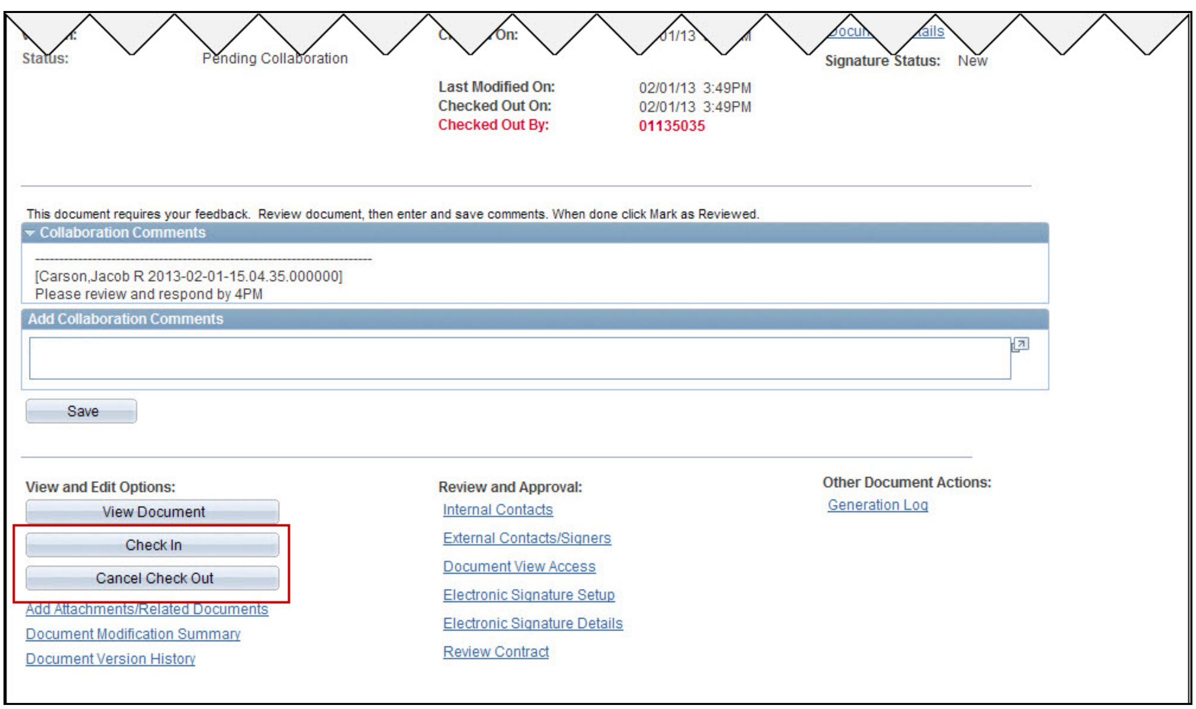
- Open the document if your system defaults to Word as the application for XML files. If you click Open and the document automatically opens in Word, this is the easiest option. When you are finished editing the document, save it, with the same filename, to your desktop or an easily accessible folder.
- Save the document if your system uses another application to open XML files. One example is Adobe Dreamweaver. Your system might also open the XML file directly in your browser. In this case, it's easier to save the file first, to your desktop or easily accessible folder, and then open Word and open the XML file out of that folder. When you are finished editing, save the file again with the same filename.

SWIFT records that you have the document checked out for editing.



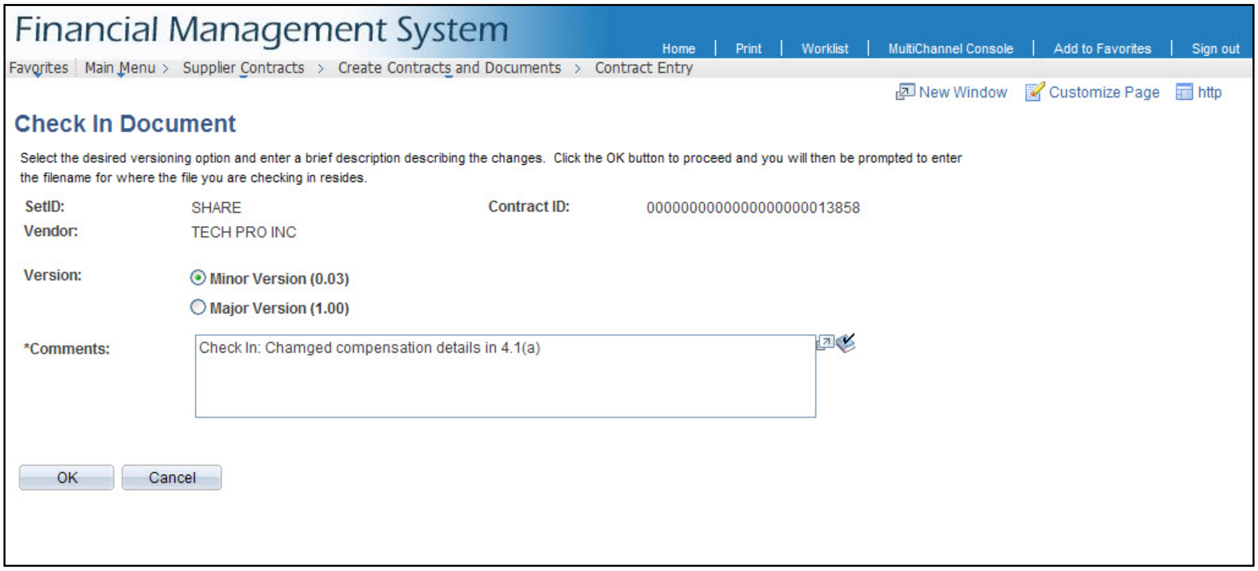
With the document open in Word, complete any necessary changes. Change tracking is turned on automatically. You should leave this on so that the Contract Administrator can see and review your changes.

When you are finished making changes, click the Check In button. If you checked the document out by mistake and need to reset it, click Cancel Check Out to restore the contract document and discard any changes.



SWIFT opens the *Check In Document* page. You must indicate the changes made and whether they constitute a minor or major change to the existing version of the document. A minor change might be something cosmetic; a major change is a content change, such as a change in vendors. The distinction is at your (or the agency's) discretion. You must also provide a comment documenting the changes made.

Complete the page with this information and click **OK**.



You must then locate and upload the file to check it back in to SWIFT.

SWIFT updates the *Document Management* page to indicate that the document has been checked back in. Note that the comments you entered on the *Check In Document* page are transferred to the *Collaboration Comments* field on this page. You can add more detail here if necessary.

Click **Mark as Reviewed** to complete the collaboration review.