

QUICK REFERENCE GUIDE

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Respond to a Collaboration Request to Review a Contract Document

Contract administrators use SWIFT to create a contract document within it. Contract coordinators can solicit feedback and document review from other SWIFT users. This process is called “Internal collaboration” in SWIFT. Contract administrators can share a contract document with multiple users and multiple times to ensure the document’s accuracy.

Contract administrators can track the feedback from collaborators and revise the contract document before the official approval process occurs electronically through SWIFT or outside of SWIFT. Using collaboration streamlines the review process and speeds up approvals.

Contract administrators can set up collaboration within SWIFT in two ways:

- **Comment Only:** The invited collaborator can only provide comments within SWIFT.
- **Edit Document:** The invited collaborator can check out the contract document from SWIFT, revise it as needed and upload it.

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. They may cancel collaboration if enough feedback has been received before all collaborators complete their review.

SWIFT Roles: Please work with your agency’s leadership to work with your Agency Security Administrator for the roles. In order to be a collaborator in SWIFT, the user must have this role:

- **Document Collaborator, M_FS_SC_DOC_COLLABORATOR**

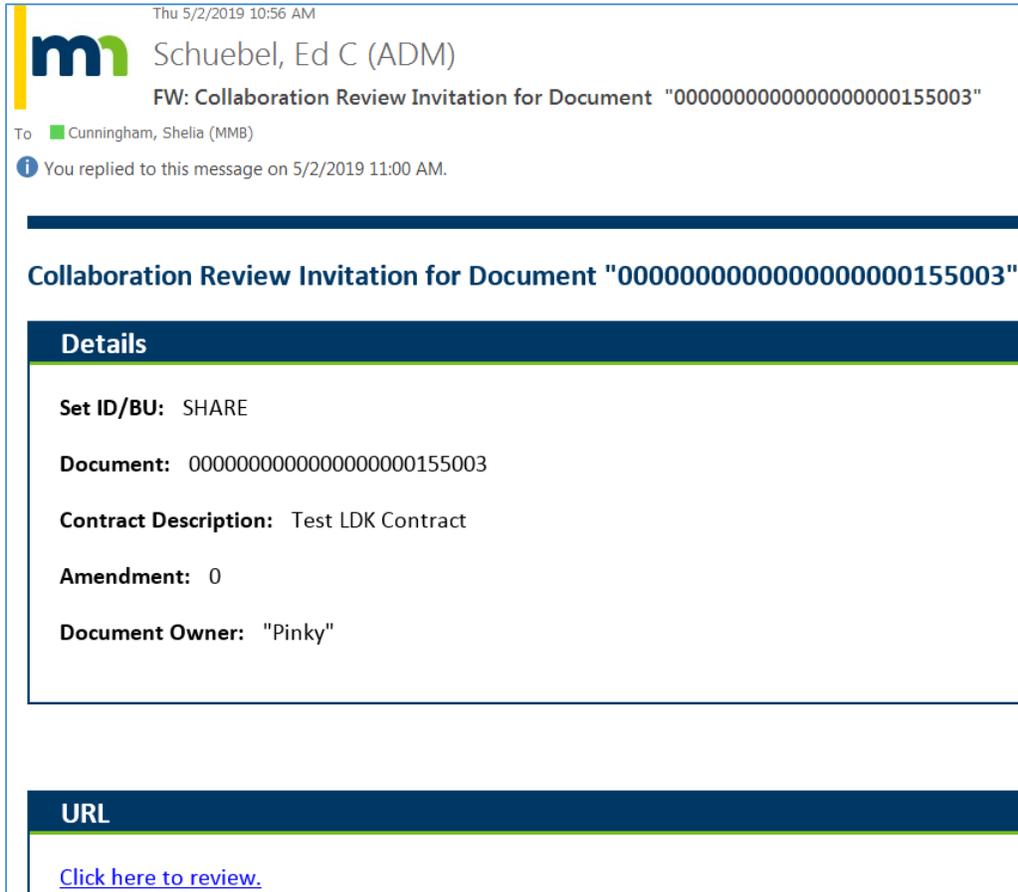
This guide provides the steps for invited collaborators to respond to an internal collaboration request.

Steps to complete

- Step 1: Internal collaborator receives an invitation to collaborate
- Step 2: 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
- Step 3: Internal collaborators mark the document as reviewed

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

2. **Email:** The notification email includes basic information about the contract document as well as a link to the SWIFT.
 - Press the link in the email to display the login page for SWIFT or log in to SWIFT via an internet browser.
 - 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.



Step 2: Review, edit (as needed) and mark the contract document as reviewed

SWIFT displays the **Document Management** page for the contract document to review.

1. Review the contract document.
 - Read the **Collaboration Comments** to make sure you are following the requirements.
 - Select **View Document** to open the document in Microsoft Word.
2. Or, edit the contract document (if you are authorized).
 - Select the **Edit Document** button to check out a copy of the document for editing.
 - SWIFT only displays the **Edit Document** button if the contract administrator authorized you to make changes to the document.
 - SWIFT updates the *Status* of the contract document to "Checked Out By".

