Route a Contract Document for Review Using Collaboration

Getting feedback electronically greatly streamlines the approval and signature processes for managing contract documents. Agencies have the option to route a contract document to staff from their agency or from another agency for review using SWIFT’s collaboration feature. Collaboration means that SWIFT routes a Word version of the contract document created within SWIFT to the designated staff person with access.

- You can set up internal collaboration following your agency’s existing contract review process.
- Collaboration allows for version control. If you allow collaborators to edit the Word document, SWIFT tracks the changes for each collaborator. The contract manager can accept or deny these edits.
- You can only send a contract document for collaboration if the contract shell’s Status is “Open” and the Authored Status is “Draft”.
- Before routing a contract document for collaboration, make sure that agency staff receive the collaboration role within SWIFT.
- Vendors or suppliers do not have access for internal collaboration. There is a separate process for external collaboration.

You can modify the collaboration while it is in process.

- **Add Collaborator**: Use the modify option to add another collaborator to the collaboration while it is in process. You do not need to cancel collaboration and start over.
- **Delete Collaborator**: Once a collaboration has started, you cannot delete collaborators using the modify option. You can only cancel the collaboration and start over.

This guide provides the steps to route a contract document for internal collaboration. It also describes the steps to modify or cancel the collaboration.

Steps to route a contract document for internal collaboration

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Steps to route a contract document for internal collaboration

Step 1: Ensure the correct SWIFT security roles

Your agency leadership needs to contact your security coordinator to add these roles for both the contract coordinator and internal collaborators.

- Document Collaborator: M_FS_SC_DOC_COLLABORATOR

Users with this role are able to collaborate on both ad hoc and transactional contract documents. Users with this role may review, edit and comment on contract documents before they are fully executed.

Access the forms and processes for adding roles on SWIFT’s Security web page:

Step 2: Access the supplier contract document

<table>
<thead>
<tr>
<th>Navigation Options</th>
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<td>Navigation Collection</td>
<td>Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.</td>
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1. On the **Contract Entry** page, select the **Find an Existing Value tab**. Enter the **Contract ID**, then press the **Search** button.

2. On the **Search Results** section, press the link of the **Contract ID**.

3. SWIFT displays the **Contract Entry** page for that contract.

**IMPORTANT**: You can only send a contract document for collaboration if the contract shell’s **Status** is “Open” and the **Authored Status** is “Draft”. Select the **Maintain Document** button on the right side of the page.
SWIFT opens up the Document Management page.

**Step 3: Route the contract document for internal collaboration**

1. SWIFT opens up the Document Management page. Go to the bottom of the page. On the Review and Approval section, select the Route Internally button.

2. SWIFT displays the Internal Contacts/Collaborators page.

The Internal Contacts List page allows you to designate the individuals who you would like to work on the contract document.
Enter the following information.

- **User**: Press the **Look Up User** icon. Search for the **User ID** of the internal collaborator.
- **Collaborator**: Check the **Collaborator** box.
- **Edit/Check In**: Check this box only if you wish the collaborator to be able to edit the contract document.
- Use the **Add Row** icon to enter more collaborators as needed.
- Enter instructions for the collaborators in the **Collaboration Instructions** text box.
- When you enter all the collaboration details, select **Save**. This moves the instructions to the **Collaboration Comments** section.
- Then, select **Route Internally** to send the document.

SWIFT sends an email to the collaborators named on the list. It also adds this collaboration request to their worklist. Collaborators select the link to open the **Document Management** page.

If a collaborator does not receive a SWIFT notification or see this request in the Worklist, then make sure that they have collaborator security role.

SWIFT returns you to the **Document Management** page. It shows that the contract document **Status** is “Pending Collaboration”.

- Collaborators access the **Document Management** page to enter their comments. If you gave them editing permissions, they can check out the contract document. They make their edits and then check the document back in. Collaborators then press the **Mark as Reviewed** button.
- SWIFT completes the worklist entry and changes the status for the collaborator’s entry. If the collaborator is the final collaborator, SWIFT updates the contract **Status** to “Collaborated/Pending Review”. SWIFT sends the owner a notification to review and accept or reject the changes that collaborators made.
- If the collaborator does not take an action, the worklist entry remains the same with no approval action taken.

3. When you have received all of the feedback you need from collaborators, check the **Finalize Collaboration** button.

SWIFT updates the **Status** to “Collaborated”.

You have successfully routed a contract document to an internal collaborator.
Steps to Modify an Internal Collaboration.

Step 1: Access the supplier contract document

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1. On the **Contract Entry** page, select the **Find an Existing Value tab**. Enter the **Contract ID**, then press the **Search** button.

2. On the **Search Results** section, press the link of the **Contract ID**.

3. SWIFT displays the **Contract Entry** page for that contract.

**IMPORTANT:** You can only send a contract document for collaboration if the contract shell’s **Status** is “Open” and the **Authored Status** is “Draft”. Select the **Maintain Document** button on the right side of the page.

SWIFT opens up the **Document Management** page.

Step 2: Modify the collaboration

1. SWIFT displays the **Document Management** page. Scroll to the bottom of the **Review and Approval** section. Select the **Modify Collaboration** button.

2. SWIFT opens the **Internal Contacts/Collaborators** page. You can only add an additional collaborator.
Select the Add a New Row (plus) icon.

3. SWIFT creates a new line. Add the additional user.
   • Check the Collaborator box. Check the Can Edit During Collaboration check boxes if desired.
   • Update any collaboration instructions.
   • Press the Save button.
   • Then, press the Route Internally button.

4. SWIFT returns you to the updated Document Management page. The Status is “Pending Collaboration”. Continue to follow the collaboration process as needed.

You have successfully modified a collaboration.
Steps to Cancel an Internal Collaboration

You have the option to cancel the collaboration at any point. Provide a reason before completing the cancellation. For example, a collaborator points out that there is a serious concern on the contract document such as incorrect vendor or contract dates. You can cancel collaboration so that other collaborators do not need to review a document that is in revision. You can then edit the document, or refresh or recreate, make the changes, and then resend for collaboration.

- If a collaborator has not responded to the collaboration request, SWIFT displays a message indicating that the contract Status is now “Draft”.
- If the collaboration process has started, SWIFT displays a message indicating that the collaboration Status will be set to “Collaboration Pending Review.” This gives the document administrator an opportunity to review the updated contract document or other collaborator comments before stopping the collaboration.

After you submit the cancel collaboration, SWIFT notifies the collaborations about the cancellation. SWIFT includes the reason for the cancellation.

**Step 1: Access the supplier contract document**

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1. On the **Contract Entry** page, select the **Find an Existing Value tab**. Enter the **Contract ID**, then press the **Search** button.
2. On the **Search Results** section, press the link of the **Contract ID**.

**Step 2: Cancel the collaboration**

1. SWIFT displays the **Contract Entry** page. Go to the top, right of the page and select the **Maintain Document** button.
2. SWIFT opens up the **Document Management** page. Go to the bottom of the page to the **Review and Approval** section. Select the **Cancel Collaboration** button.
3. SWIFT opens up the **Cancel Collaboration** page. Add a reason for the cancellation in the **Comments** section. Select **OK**.

![Cancel Collaboration](image)

4. SWIFT displays a message. Press the **OK** button.

![Message](image)

SWIFT returns you to the **Document Management** page. The document **Status** is “Draft”.

![Document Management](image)

**You have successfully canceled an internal collaboration.**