

QUICK REFERENCE GUIDE

November 1, 2019

Invite Collaborators during Event Creation

As an optional step, you can invite other SWIFT users to collaborate on an event while you are creating the event. Collaboration is inviting other internal users to review the event online and provide feedback on it. It is more flexible than workflow but still allows other users to review and suggest changes to the event before it is posted for bidding.

Roles:

- **Event Creator:** The event creator monitors the status of collaboration to ensure it is on track and deadlines are met while needed information is gathered. The event creator can cancel or reroute the collaboration process as needed.
- **Event Collaborator:** In order to participate in the online collaboration process, your agency must assign internal staff with the “Event Collaborator” role in SWIFT. Confirm the user has the security to update events.

IMPORTANT! Collaboration on the Strategic Sourcing module is date-driven

- All of the collaboration reviews must be completed before the *Preview Date* of the event. If the collaborators don’t complete them, SWIFT will open up the event for posting. This differs from Workflow approvals, in which SWIFT will not open the event until all approvers complete their review.
- Make sure you plan enough time for all collaborators to complete their reviews before the *Collaboration Due Date* on the **Event Collaboration Details** page and the *Preview Date* on the **Event Summary** page.

This guide describes the steps to invite collaborators, review their input and end a collaboration. It assumes that you are creating a new event and inviting collaborators as an optional step. Use other reference guides for the details of the steps not part of collaboration.

Steps to process

- Step 1: Create the event in the Event Summary page
- Step 2: Set up the collaboration in the Event Collaboration Details page
- Step 3: Manage the collaboration.
- Step 4: Take action on the collaboration

Steps to use collaboration on an event during event creation

Step 1: Create the event in the Event Summary page

This guide describes the collaboration process for creating a new event. You can also edit an existing event in an “Open” *Status* and invite collaborators as an optional step.

- Navigate to the **Add a New Value** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value tab.
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value tab.

- On the **Create Events** page, enter required information on the **Add a New Value** tab. Select the **Add** button.
- SWIFT displays the **Event Summary** page. Populate the required fields on the header, **Define Event Basics**, **Configure Line Items**, and **Select Bidders to Invite** sections. Save the event after entering information in the sections.

Step 2: Set up the collaboration in the Event Collaboration Details page

1. On the **Event Summary** page, select the **Event Collaborators** link.

SWIFT displays the **Event Collaboration Details** page.

2. Enter the following information on the header of the **Event Collaboration Details** page.
 - *Collaboration Due Date*: This is the date when all collaborators and sections must be completed. It must be before the *Preview* and *Start Dates* of the header of the **Event Summary** page. Make sure your collaborators have enough time to complete their reviews.
 - *Process Type*: Select “Sequential”. SWIFT will route the collaboration in the order of the *Sequence Number* in the **Review** sections.
 - *Review by Notifications*: SWIFT does not currently use this feature. Leave it set to “Never”.

The screenshot shows the 'Event Collaboration Details' form. It includes a 'Collaboration Due Date' field with a calendar icon, a 'Time' field, a 'Process Type' dropdown menu set to 'Sequential', and a 'Review By Notifications' section with radio button options: 'Never' (selected), 'One day before', 'One week before', 'Weekly before deadline', and 'Daily starting one week before'.

3. In the **Review Sections** area, you can create multiple sections for collaboration. Each section can have multiple collaborators.
 - Enter the *Sequence Number* and *Section Name* for each section.
 - Make sure that the *Section Review By Date* is completed and fits within all of the dates of the event listed on the **Collaboration Details** page and the *Preview Date*.

4. Enter the following information for each collaborator on the **Collaborators** section of the **Event Collaboration Details** page.

- *Seq Nbr*: The order in which collaborators will be notified to access and update the event.
- *UserID*: Employee ID of the invited collaborator.
- *Review by Date*: The date and time by which the user must have completed their review and update of the event.
- *Delegate User ID*: SWIFT does not currently use this feature.
- *Override Main Collaborator box*: SWIFT does not currently use this feature.
- Use the **Add a New Row** icon (red “plus” symbol) to add another line.

IMPORTANT! Notice the dates. If you do not get them sequenced correctly, SWIFT will not save the information on the **Event Collaboration Details** page.

- The *Collaboration Due Date* must be after the **Section Review By Date**.
- The individual collaborator’s *Review by Date and Time* must be before the *Section Review by Date*.
- All of these dates must be earlier than the *Preview Date* on the **Event Summary** page.

Seq Nbr	UserID	Name	Review By Date	Time	Delegate User ID	Name	Override Main Collaborator	Reviewed	Allow RFx Document Edit
1		Employee Name	08/14/2019	8:24AM			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		Employee Name	08/13/2019	8:24AM			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- When you are done, select the **OK** button at the bottom of the page.

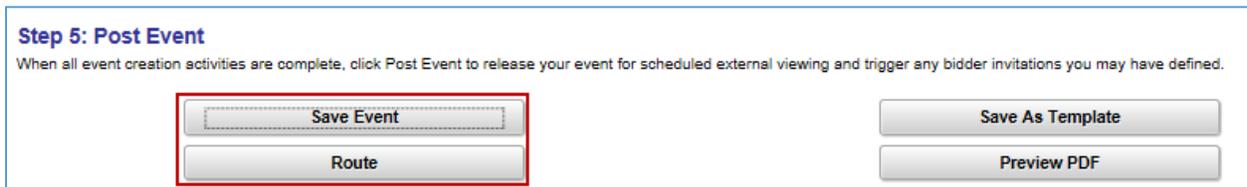
Fields on the Collaborators section of the Event Collaboration Details page

Field Name	Field Description
Seq Nbr (Sequence Number)	This field will determine the order that each collaborator receives access to the event.
UserID	Enter the Employee ID of each invited collaborator. You can use the Look Up icon to find the employee name and ID.
Review by Date	This is the date by which you want the individual collaborator to complete their review.
Delegate User ID	SWIFT does not currently use this feature.

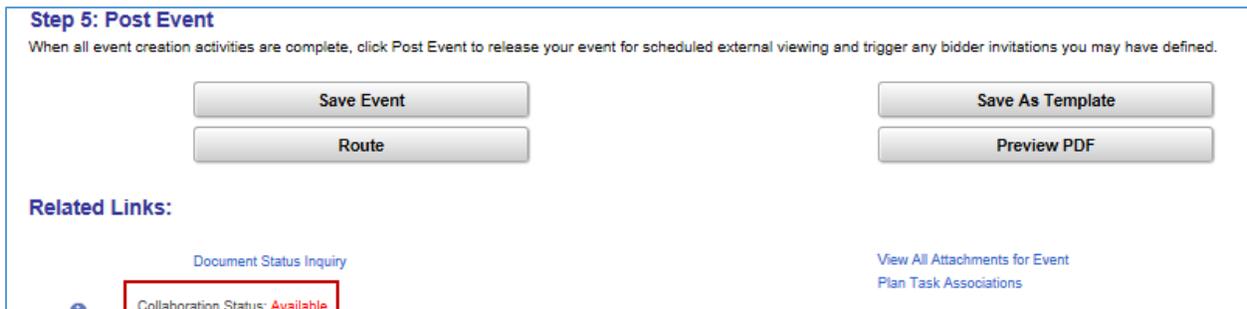
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Field Name	Field Description
Override Main Collaborator box	SWIFT does not currently use this feature.
Allow RFX Document Edit	SWIFT does not currently use this feature.
Add Section button	Allows the user to add different groups of collaborators as a separate section. This is optional.

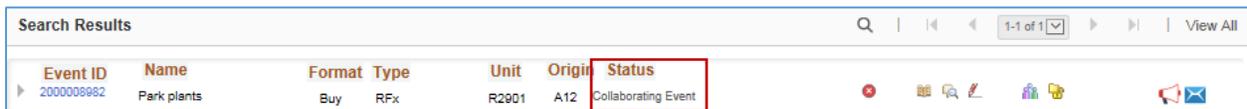
- When you are ready to complete the event, save your changes and return to the **Event Summary** page. Save the event. Select the **Route** button. The **Route** button appears only if you set up a collaboration.



- SWIFT updates the event for the collaboration.
 - SWIFT sets the *Collaboration Status* to "Available".



- On the **Event Workbench**, SWIFT shows the event *Status* as "Collaborating Event".



- SWIFT routes the event to the first collaborator.
- As a best practice, you may wish to email the collaborators to let them know they have an event requiring their collaboration.

Step 3: Manage the collaboration

- Navigate to the **Event Workbench** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Maintain Events, Event Workbench.

- On the **Event Workbench**, enter search criteria such as the *Event ID*. Select the **Search** button.

Event Workbench

▼ **Search Criteria**

Business Unit

Event ID

Created By

Event Format

Event Type

Event Status

Associated With

Origin

Plan

From Start Date

To Start Date

From End Date

To End Date

Category

Item ID

Description

Sort With

Sort Order

Only show Events I created

Only show Active Events

Use my search defaults

Search **Reset**

- SWIFT displays the **Search Results** section. Select the **View Collaboration** icon for the event.

Search Results

Event ID: 2000008987 | Name: Plants for Fort S... | Format: Buy | Type: RFx | Unit: R2901 | Origin: A12 | Status: Collaborating Event

View Collaboration icon

- Review the collaboration.

SWIFT displays the **Review Event Collaboration** page.

- On the header, select each link to see if there are any recommended changes to that section.

Review Event Collaboration

Business Unit: R2901 | Event ID: 2000008987 | Round: 1 | Version: 1

Event Name: Plants for Fort Snelling State Park | Format: Buy | Type: RFx

[Event Header](#) | [Event Lines](#) | [Bid Factors](#)

[Invited Bidders](#) | [Constraints](#) | [Comments and Attachments](#)

Filter By:

- On each of the section pages, you can see who provided the feedback and accept or reject it. If you select the **Update Event** button, SWIFT will change the original event with the changes you accepted.

Field	Name	Date/Time	Action	Value	Update	*Update Action
AUC_BIDDER_FLG	Original	01/23/2019 2:55:23PM	Update	Only Responded Bidders	<input type="checkbox"/>	Accept
AUC_BIDDER_FLG	Collaborator	01/23/2019 2:55:23PM	Update	All Bidders	<input type="checkbox"/>	Reject

Update Event

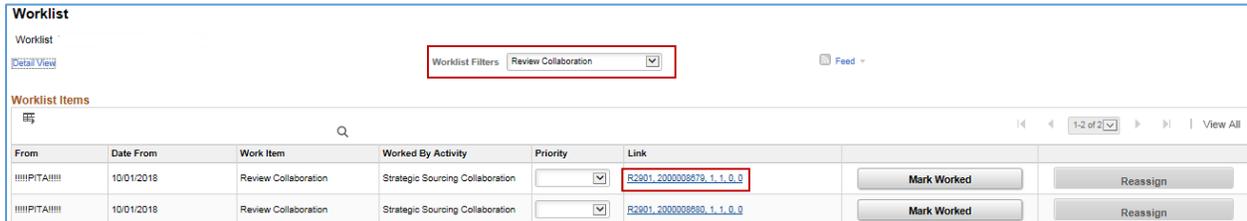
- Access your completed collaborations.

Once the *Preview Date* is reached or all collaborators have completed the collaboration process, SWIFT considers the collaboration to be complete. SWIFT notifies the event creator by email and worklist entry.

- Navigate to the **Worklist** page in the Strategic Sourcing module.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event, Left Menu, Worklist.

- On your **Worklist** page, you can use the *Worklist Filters* “Review Collaboration” selection to see any collaboration results that are ready for your review.
- Select the **Link** of the collaboration you wish to view.



- Follow the same actions outlined above.

Step 4: Take action on the collaboration

There are several actions you can take after you review the collaboration input.

1. Edit the event.

You can accept any changes recommended by the collaborators and post the event.

2. Create a new version of the event.

You can create a new version of the event and invite collaborators to have a snapshot of the event before and after collaboration. Your team can compare the previous version to the current collaborated version.

3. Cancel the collaboration.

If you cancel the collaboration, you can post the event without making any recommended changes.

4. Remove any collaborators.

If you remove a collaborator from the event, SWIFT sends an email notification indicating that he or she has been removed.

5. Post the event.

When you are ready, post the event and open it up for bidders.

You have successfully reviewed how to use collaboration during event creation.