SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated March 1, 2023

Collaborate on Contracts with the State

Collaboration refers to how a supplier reviews contract documents from the State. After receiving email notification to collaborate with the State, the supplier may log in to the Supplier Portal and collaborate in one of two ways:

1. **Comment Only:** The supplier may add comments to the contract document.
2. **Edit:** The supplier may make edits to the contract document.

After adding comments or making edits to the contract document, the supplier uploads the reviewed contract document to the Supplier Portal, and a State agency administrator will review it for approval.

Steps to complete

- Step 1: Find the contract document number and log in to the Supplier Portal.
- Step 2: Download the contract document and review it by adding comments or making edits.
- Step 3: Upload the reviewed contract document to the Supplier Portal.
- Step 4: Mark the contract document as reviewed.

Note: Before suppliers collaborate with the State on contract documents, they must set up Microsoft Word as the default program to view and edit XML files—see Set up Microsoft Word for XML files below.

Collaboration on Contract Documents

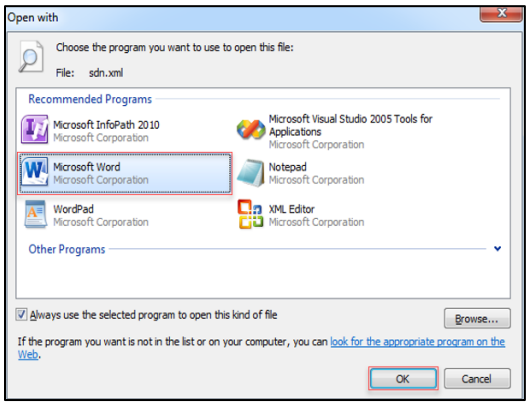
Set up Microsoft Word for XML files

Contract documents open as XML files. To review the contract document, make sure Microsoft Word has been set up as the default program to view and edit XML files. You can do set up this default program on Windows 7 operating system.

For Windows 7 operating system

1. Right-click the XML document.
2. Select the "Open With" option.
3. Select the *Choose Default program* option.
4. Select *Microsoft Word*.
5. Check mark the **Always use the selected program to open this kind of file** box.

6. Click the **OK** button.

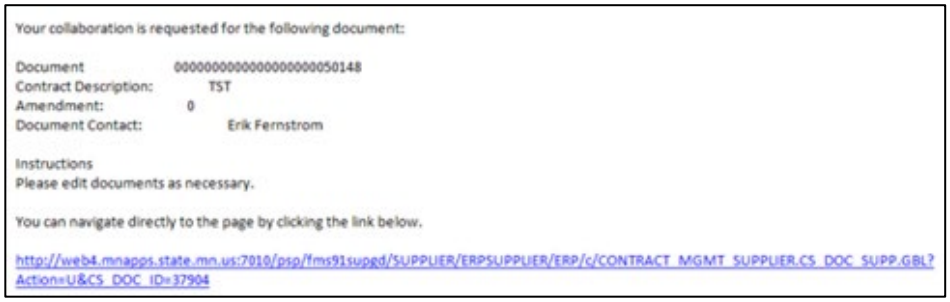


Collaborate on Contract

Suppliers selected to collaborate with the State will receive email notification with instructions to either comment on or edit the contract document. The email will include the contract document identification number and a link to the Supplier Portal.

Step 1: Find the contract document number and log in to the Supplier Portal.

1. Find the contract document identification number provided in the email. (You will use this number in **Step 2**.)
2. Select the link in the email to open the *Supplier Portal* login page.



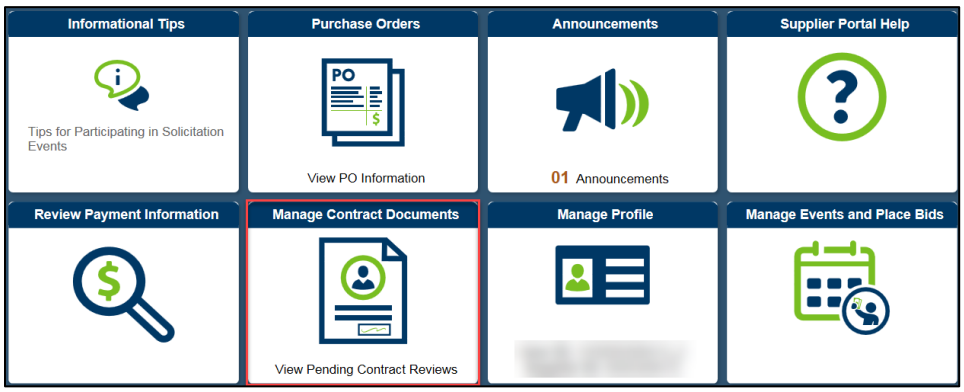
3. To log in to the Supplier Portal, select the **Sign In** tile.

4. Enter the registered supplier information in the *User ID* and *Password* fields.

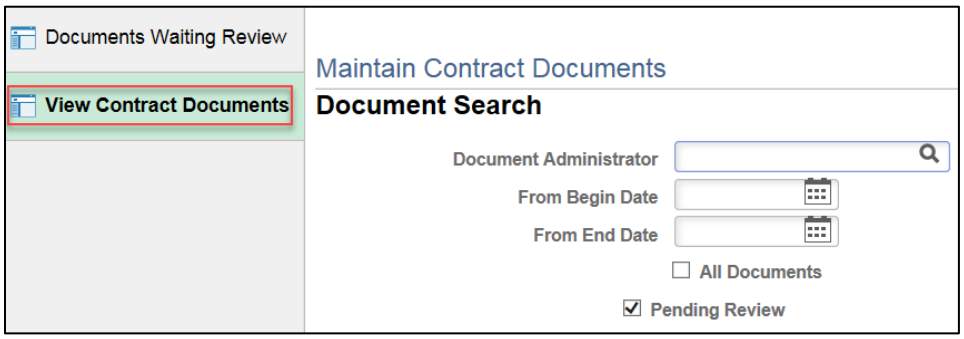
5. Press the **Sign In** button.

Step 2: Download the contract document and review it by adding comments or making edits.

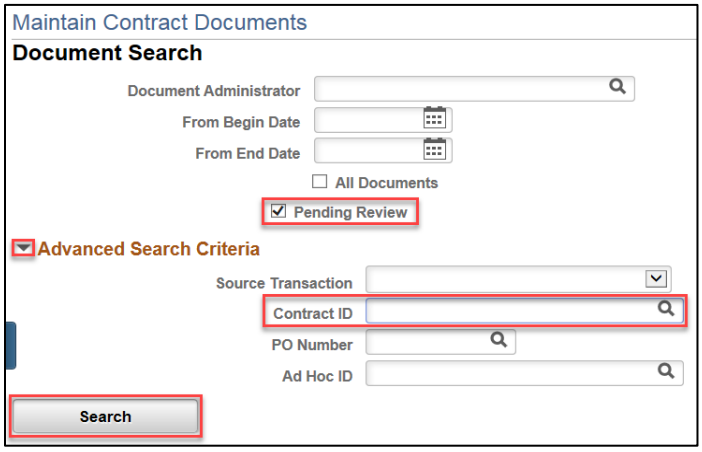
1. Select the **Manage Contract Documents** tile.



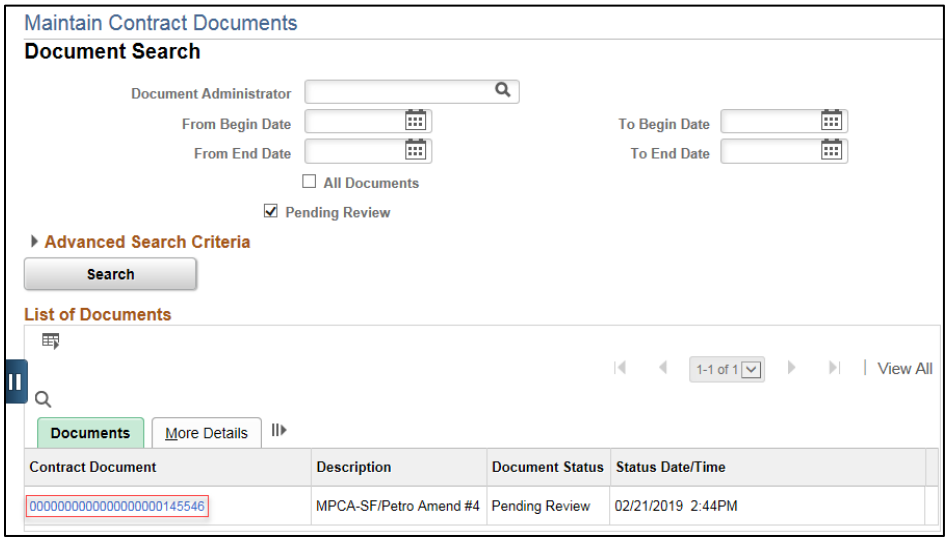
2. On the left-menu, select *View Contract Documents*.



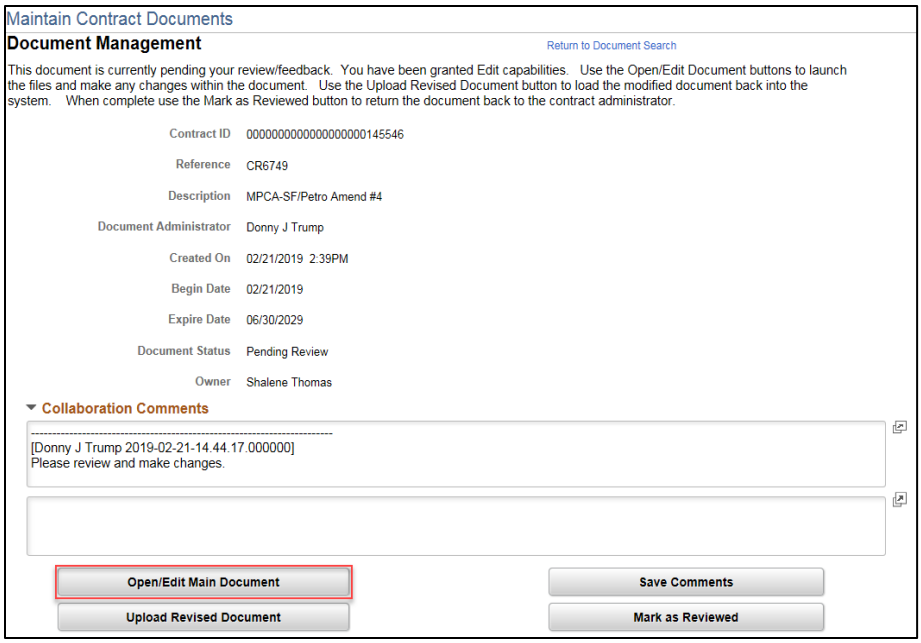
3. On the *Maintain Contract Documents* page, check mark the *Pending Review* box, which will restrict the Document Search to contract documents routed for collaboration.
4. Press the arrow icon to expand the *Advanced Search Criteria* section.
5. Enter the contract document identification number in the Contract ID field.
6. Press the **Search** button.



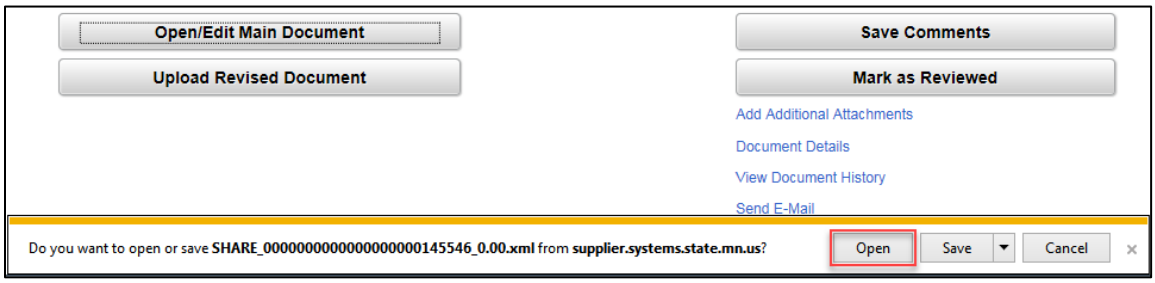
7. Search results will display below the *List of Documents* section. Select the contract document identification number in the *Contract Document* field.



8. The *Document Management* page will display. Press the **Open/Edit Main Document** button to open the contract document.



9. Press **Open** to open the contract document from the Supplier Portal.



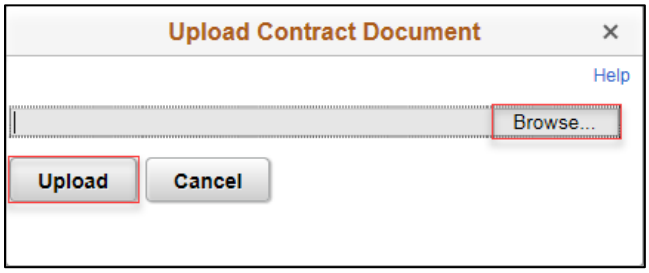
10. The contract document will open in Microsoft Word. Review the contract document by adding comments or making edits via Track Changes, as needed.
11. Save the reviewed contract document (e.g., to desktop or shared drive). Do not change the file name.

Step 3: Upload the reviewed contract document to the Supplier Portal.

1. Back on the *Document Management* page, press the **Upload Revised Document** button to upload the reviewed contract document to the Supplier Portal.

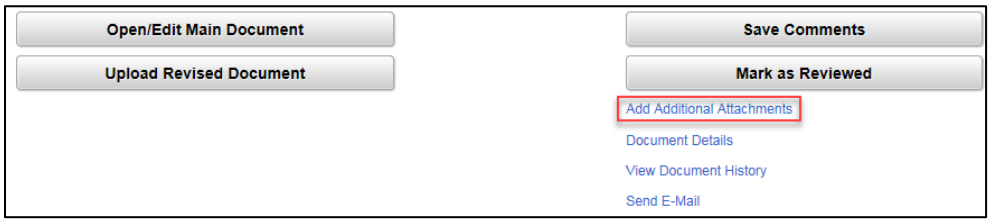
   Note: The **Upload Revised Document** button displays only if the Contract Administrator authorized the supplier to collaborate with the State.

2. The *Upload Contract Document* window will display. Press the **Browse** button to search for and attach the saved reviewed contract document, and then press the **Upload** button.

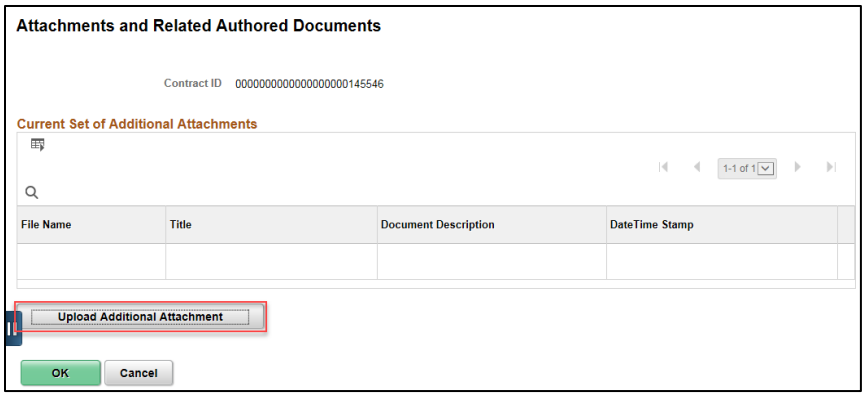


3. Select the *Add Additional Attachments* link to upload any additional attachments, if applicable.

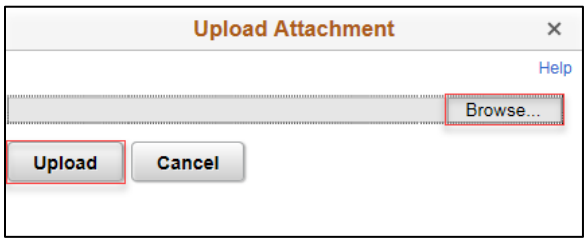
   Note: If the contract document already included additional attachments, the link will say *View Attachments*.



4. The *Attachments and Related Authored Documents* page will display. Press the **Upload Additional Attachment** button.

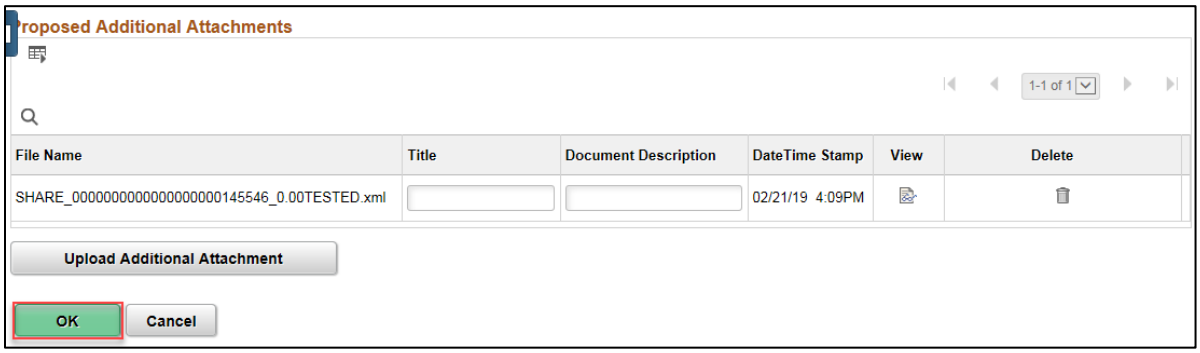


5. The *Upload Attachment* window will display. Press the **Browse** button to search for and attach the additional attachment(s), and then press the **Upload** button.



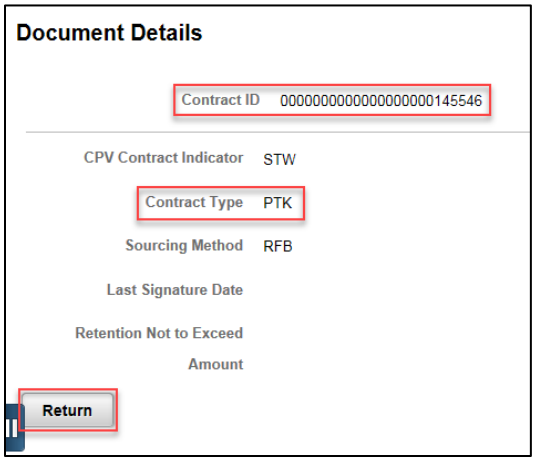
6. The *Proposed Additional Attachments* section will now display showing the *File Name* and

Date/Time Stamp. Press **OK** to return to the *Document Management* page.

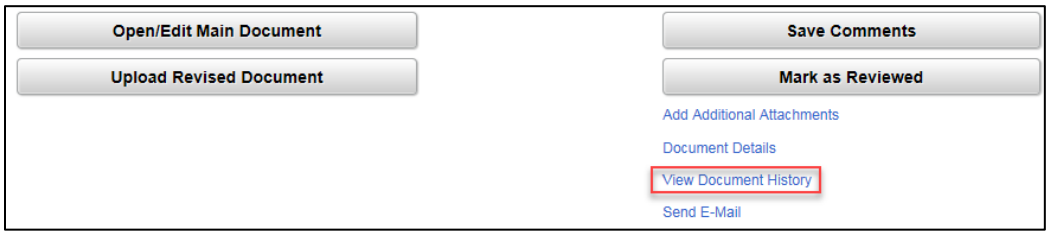


7. If applicable, select the *Document Details* link to view the *Contract Type*.

8. The *Document Details* page will display showing the *Contact ID* and the *Contract Type*. Press the **Return** button to return to the *Document Management* page.

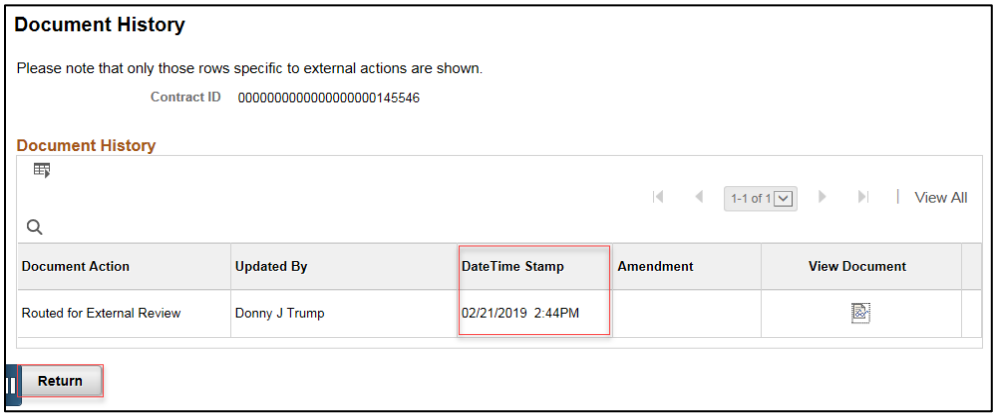


9. If applicable, select the *View Document History* link to view when the contract document was uploaded and/or updated.



10. The *Document History* page will display. Review the *Date/Time Stamp* fields to see when the

contract document was uploaded/updated. Press **Return** to go back to the *Document Management* page.

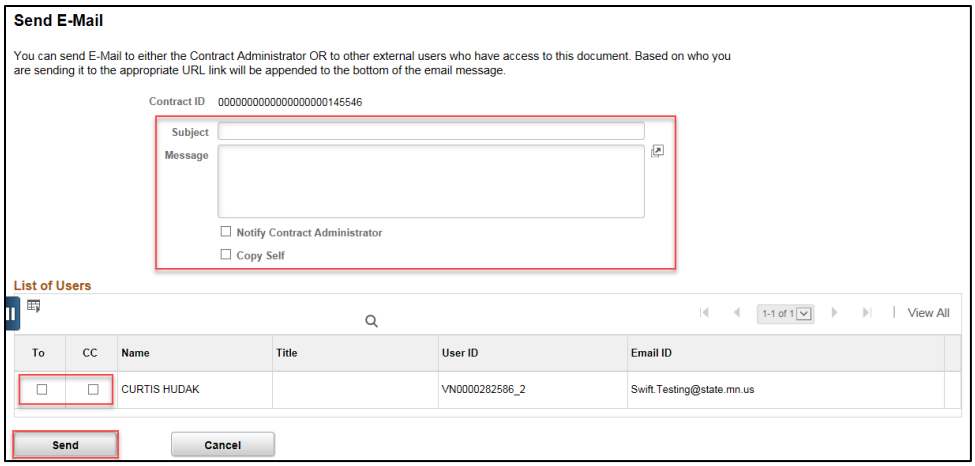


11. Select the *Send E-Mail* link to email the Document Administrator and communicate that the contract document has been reviewed.

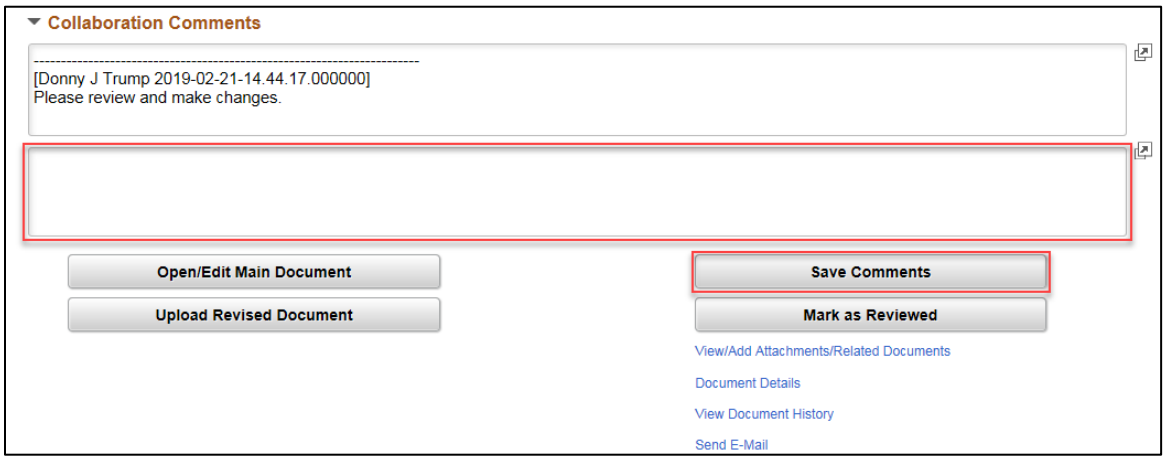
12. The *Send E-Mail* page will display. Enter information in the following fields to send an email to the Document Administrator.

Field	Field Description
Subject	Enter a subject line title for the email.
Message	Enter a message to communicate that the contract document has been reviewed.
Notify Contract Administrator	Check mark this box to notify the Contract Administrator that you sent an email.
Copy Self	Check mark this box to send a copy of this message to the supplier's email.
To	Check mark this box to send the email to the *Name* listed under *the List of Users*.
CC	Check mark this box to send a copy of the email to the *Name* listed under the *List of Users*.

13. Press the **Send** button. After pressing **Send**, you will return to the *Document Management* page.



14. Enter any additional comments about the reviewed contract document in the *Collaboration Comments* box, if needed, and press the **Save Comments** button.



Step 4: Mark the contract document as reviewed.

1. After reviewing the contract document and uploading it to the Supplier Portal, press the **Mark as Reviewed** button.

2. SWIFT will notify a State agency contract document administrator that the supplier has completed collaboration on the contract document. The Administrator will reviews the supplier's comments or edits, contact the supplier for clarification, and/or initiate further collaboration, if needed.