

## **QUICK REFERENCE GUIDE**

### *External Collaboration on Contracts*

*Revised April 26, 2013; January 10, 2013*

#### **Introduction**

Collaboration is a means by which the state solicits feedback from Vendor Contacts. The collaboration functionality in SWIFT is used to send Contract Documents to Vendor Contacts for review and input regarding specific Contract Documents. At the initiation of this effort, you receive an email informing you that you have been selected to participate. You then log in to the Supplier Portal (**using your unique Vendor User ID**) in order to do so.

Collaboration is accomplished in one of two ways:

- **Comment Only:** This form of collaboration provides the Vendor Contact the ability to view the Contract Document, and provide comments.
- **Edit Document:** This form of collaboration allows the Vendor Contact to download a copy of the Contract Document, revise it and upload it back into the system.

At the completion of this process, your feedback is sent to the Document Administrator for review, follow-up, and to apply as necessary.

**View and Update Contract Documents:** All contract documents are XML files. In order to view and update contract documents, you **MUST** ensure that your computer is set with Microsoft Word as the default program for viewing and editing XML files.

*Please refer to [page 7](#) in this Guide to see how to set the default program for XML documents*

#### **Steps to Collaborate**

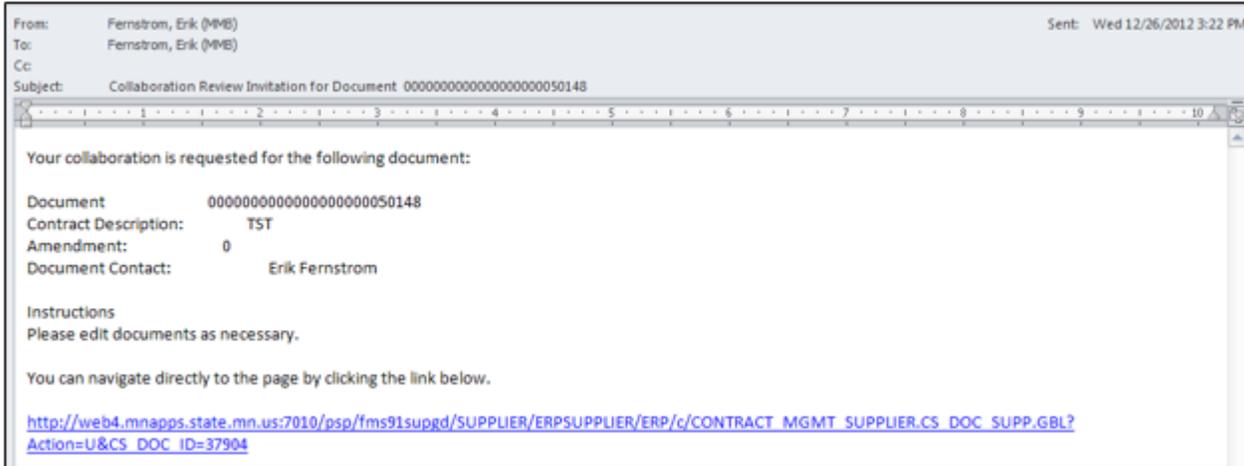
- Receive Notification to Participate
- Log in to Supplier Portal
- Search for Document
- Collaborate
- Mark Document as Reviewed

#### **Step 1: Receive Notification to Participate and log into Supplier Portal**

Vendor Contacts selected to participate receive an email notification. The notification includes basic information about the Contract Document as well as a link to the Supplier Portal.

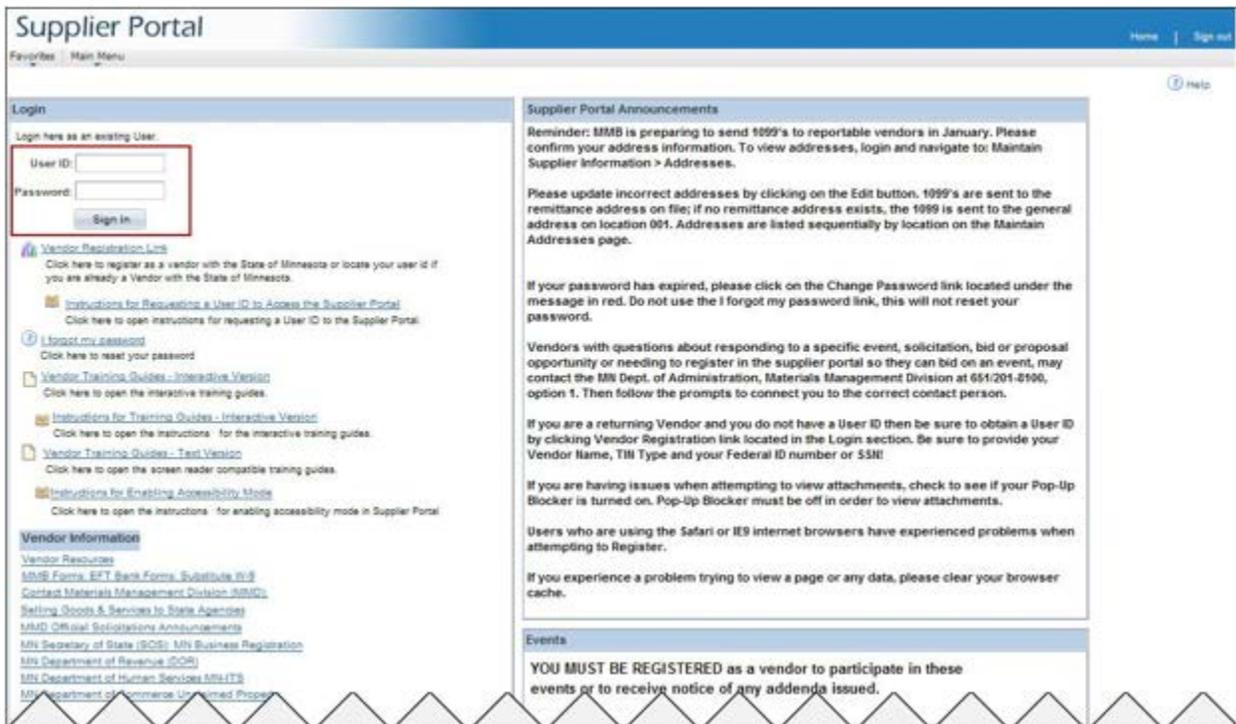
Click the link in the email to display the login page for the Supplier Portal or log in to the Supplier Portal via a browser.

**Note:** If you are **already logged in to the Supplier Portal** and use the link in the notification, you do not have to search for the document; the collaboration page displays automatically after you log in to the Supplier Portal.



You also have the option to log in to the Supplier Portal directly from a browser window. Navigate to <http://supplier.swift.state.mn.us>.

Enter your Vendor User ID and Password and then click **Sign In**.

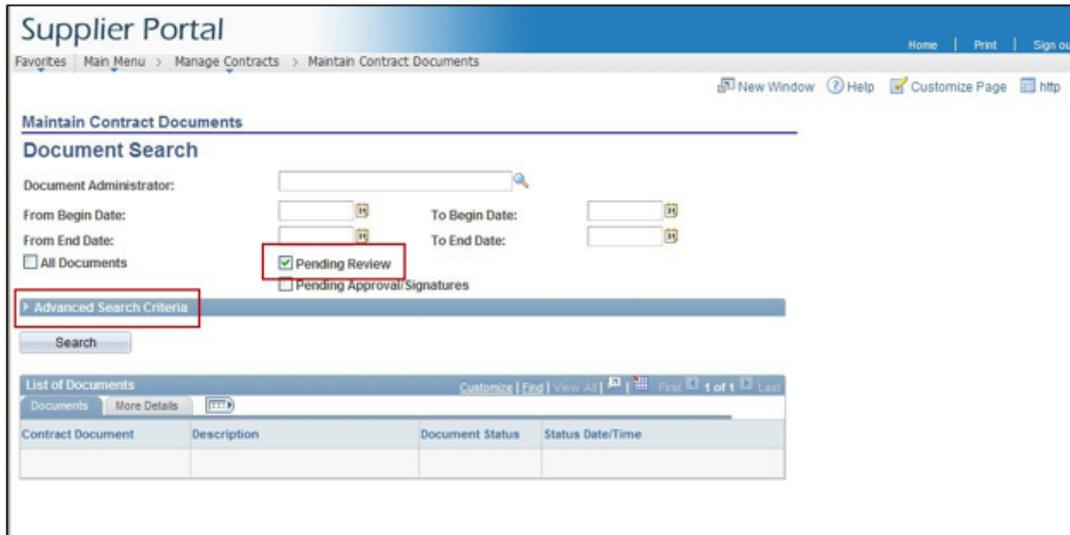


## Step 2: Search for the Contract Document

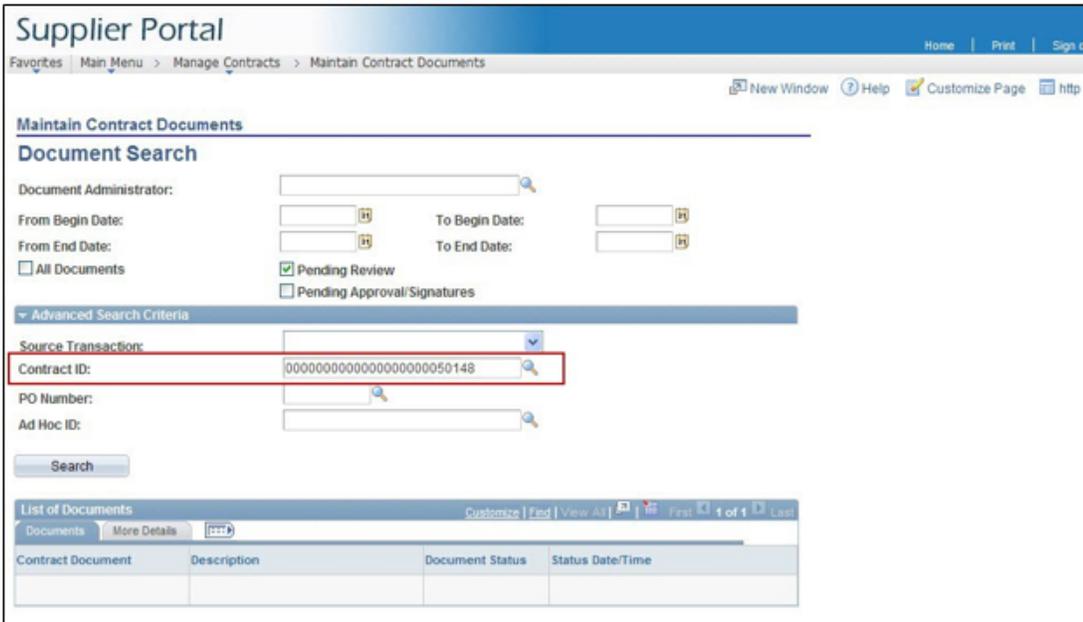
1. After accessing the Supplier Portal, you must search for the document requiring collaboration by navigating to the *Maintain Contract Documents* page:

**Navigation:** *Main Menu, Manage Contracts, Maintain Contract Documents*

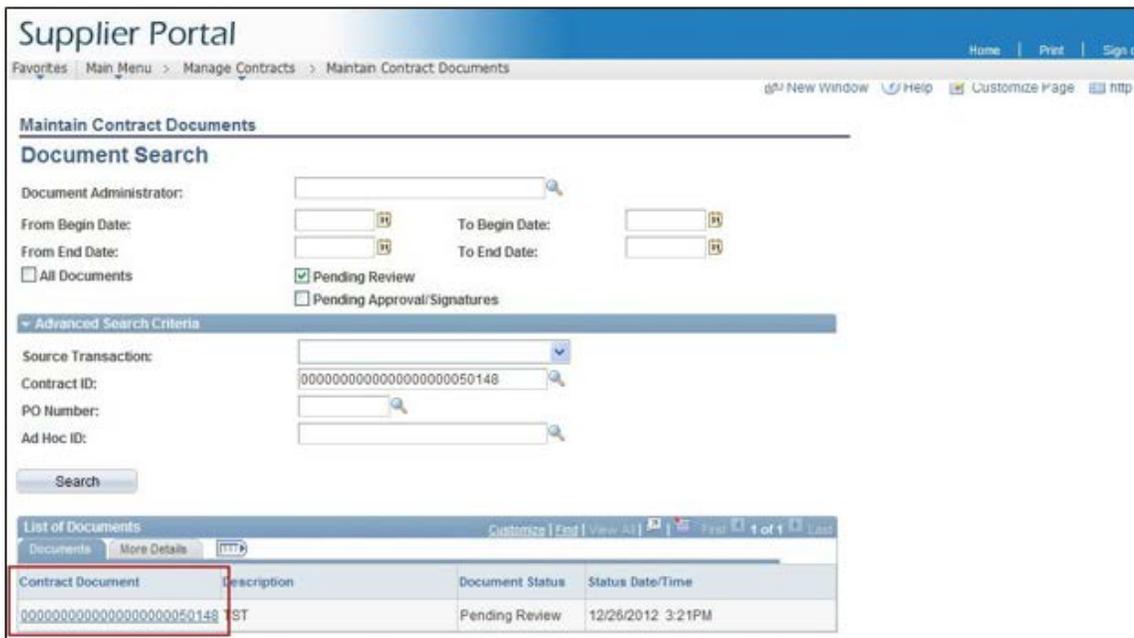
2. Select the *Pending Review* checkbox to restrict your search to only documents that have been routed for collaboration.
3. To use additional search fields, expand the *Advanced Search Criteria* section by clicking the arrow.



4. The email notification contains the Contract ID. You can enter the Contract ID in the search criteria or select it in the search results. If you do not know the Contract ID, you can leave this field blank and enter other search criteria, such as the Purchase Order number, **OR** you can leave all criteria fields blank and just display all documents awaiting review.
5. When all search criteria are entered, click the **Search** button.



6. In the search results, click the *Contract Document* link.



### Step 3: Collaborate

When you click the *Contract Document* link in the search results, SWIFT opens the *Document Management* page:

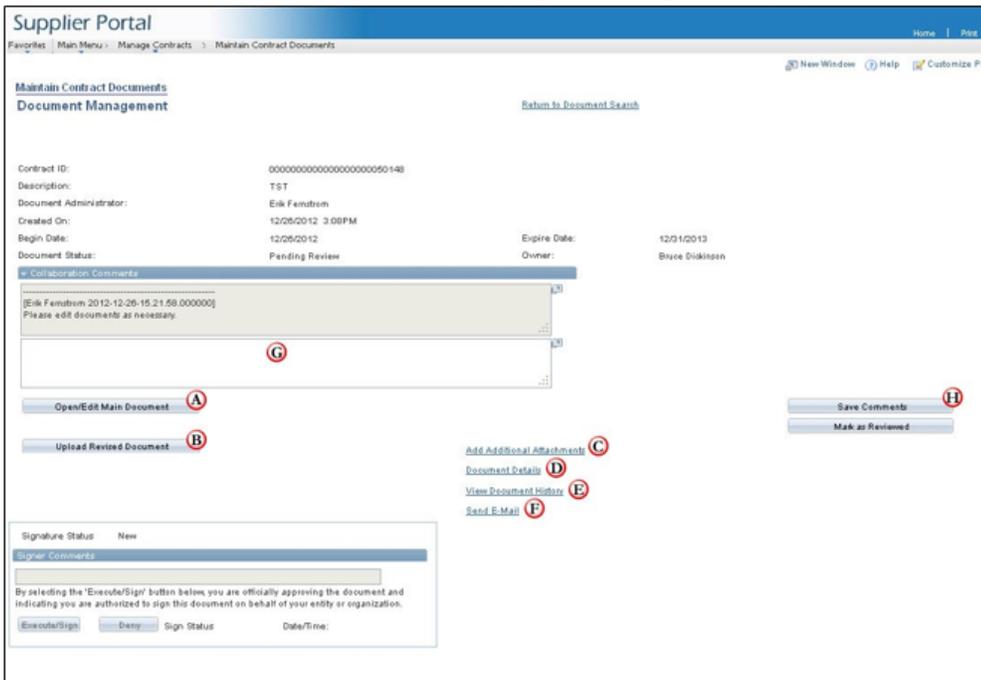
- A) Click the **Open/Edit Main Document** button to open the document for review and to make applicable changes. The document opens in Microsoft Word. Save the document to your desktop

when you are finished making changes. **DO NOT CHANGE THE FILE NAME.**

- B) Click the **Upload Revised Document** button to upload the revised document into the Supplier Portal. **NOTE:** This button is only visible if the Contract Administrator has authorized you to make changes to the contract document during vendor collaboration.
- C) Click the *Add Additional Attachments* link to upload additional attachments related to the document. **NOTE:** This link reads “View/Add Attachments/Related Documents” if the contract document already includes attachments. You can click the link to view the existing attachments as well as to upload additional attachments of your own.
- D) Click the *Document Details* link to view the Contract Type and Statement of Purpose.
- E) Click the *View Document History* link to view past status and actions relating to the document.

**This is especially important when reviewing amended documents.**

- F) Click the *Send E-Mail* link to send an email to the Document Administrator or other users having access to the document.
- G) Enter any comments about the document in the *Collaboration Comments* text box .
- H) If you add comments in the *Collaboration Comments* box, you have the option to save the comments and return later to continue the collaboration review by clicking the **Save Comments** button. It’s also a good idea to save your comments before marking the document as reviewed. **Note:** You may need to scroll the page to the right to display this button.



## Step 4: Mark Document as Reviewed

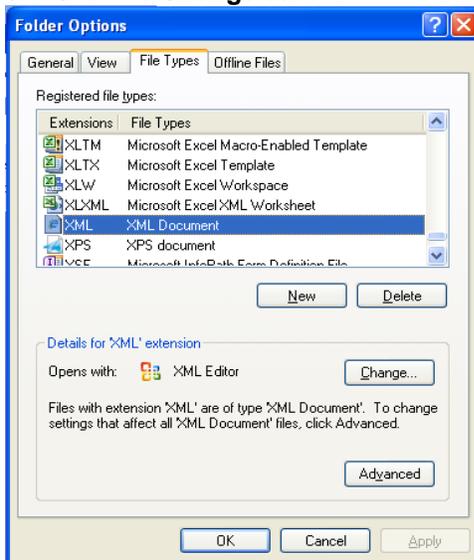
When you are finished with collaboration, click the **Mark as Reviewed** button to notify the Document



## Setting Microsoft Word as the default program for XML files

### For Windows XP operating system:

1. Open the Control Panel.
2. Select Folder Options.
3. Click the File Types tab.
4. Select XML Document.
5. Click the **Change** button.



6. Select Microsoft Word. Make sure the *Always use the selected program to open this kind of file* check box is selected.
7. Click the **OK** button.
8. Click the Close button to close the Folder Options window. The setting is saved and Microsoft Word will be used as the default program when opening XML documents.



## For Windows 7 operating system:

1. Right click on an XML document.
2. Select the Open With option.
3. Select the Choose Default program option.
4. Select Microsoft Word.
5. Make sure the *Always use the selected program to open this kind of file* checkbox is selected.
6. Click the **OK** button. The setting is saved and Microsoft Word will be used as the default program when opening XML documents.

