

CREATE A CONTRACT BY COPYING FROM AN EXISTING CONTRACT

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Create a Contract by Copying from an Existing Contract

A commonly used feature of SWIFT is the ability to create a contract from an existing contract. The benefit is clearly the time saved from keying in the data fields (e.g., update annual plans). Also, there can be a quality control if you are copying many contracts (e.g., grants) from one contract.

Step 1: Navigate to the Contract Entry Page.

- **Navigation:** Main Menu, Supplier Contracts, Create Contracts and Documents, Contract Entry, Add a New Value
- On the **Add a New Value** page, follow these steps.
 - SWIFT automatically populates the *SetID* with "SHARE"
 - Leave the *Contract ID* with the default of "NEXT". SWIFT will assign the next available number. Do not change this field.
 - On the *Contract Process Options*, **ALWAYS select "Purchase Order"** from the drop down menu.

NOTE: The State of Minnesota does not use the other *Contract Process Options* because of State Statute 16.A.15. www.revisor.leg.state.mn.us/statutes/?id=16a.15

- Click the **Add** button.

The screenshot shows the 'Contract Entry' page. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red box. Below the buttons, there are three form fields: 'SetID:' with the value 'SHARE', 'Contract ID:' with the value 'NEXT', and 'Contract Process Options:' with a dropdown menu set to 'Purchase Order'. The 'SetID' field is also highlighted with a red box. At the bottom left, there is an 'Add' button, also highlighted with a red box.

Step 2: Copy the Contract.

- On the Contract header, click the **Copy from Contract** link.

The screenshot shows the 'Contract Entry' page with the 'Contract' header. Below the header, there are several fields: 'SetID:' with the value 'SHARE', 'Contract ID:' with the value 'NEXT', and '*Status:' with a dropdown menu set to 'Open'. A 'Copy From Contract' link is highlighted with a red box. To the right, there is a 'Contract Version' section with a 'Version:' field set to '1', a 'Status:' field set to 'Current', and an 'Approval Due Date:' field. A 'New Version' button is also visible.

- On the Copy Contract page, enter a field to find the contract you wish to copy from. You can search by Contract ID, Vendor or MMD Contract Release/T Number.

- Click **Search**.

Contract Entry

Copy Contract

SetID: SHARE
Contract ID: NEXT

Contract Search

Contract ID: 000000000000000000000000107833 MMD Contract Release Number/T-Number:

Vendor: Allow Open Item Reference
Vendor ID:

- The contract appears on the Select Contract section. Review the information to ensure it is the correct contract. Click the **Sel** (Select) button next the Contract ID. Click **OK**.

Select Contract

Contracts | More Details

Sel	Contract ID	Version	Description	Vendor ID	Short Vendor Name	Vendor Contract Ref
<input checked="" type="checkbox"/>	000000000000000000000000107833	1	Master Contract 1610A	0000833496	WORKING CO-001	

Step 3: Review and Complete the Copied Contract.

All details of the original contract are copied over. The header, PO Defaults and line fields are populated.

- Review these items. Update line or header information and complete the contract
- Save the Contract. You will receive a message about copying the contract documents from the original contract to the newly created one.

Message

Contract Document exists. (10400,563)

A contract document exists on your originating contract. Would you like to copy the contract document to the new contract? If you choose No, you can build your document from a configurator or through Contract Copy at a later time. If you choose Yes, you can always regenerate your contract from a configurator at a later time.

- If “Yes”, you can generate the contract documents from the configurator. SWIFT brings you to the Create Document page.
- If “No”, you will need to rebuild the contract documents from the configurator.

Step 4: Add the Contract Documents.

The **Create Document section** is required for all contracts. It specifies the contract type.

As a best practice, you can import a copy of the scanned contract documents. This allows contract administrators to keep the written contract with the SWIFT Contract ID. Typically, you will not have fully executed a contract when you are doing a contract shell in SWIFT. You can return to this field and import the scanned contract documents.

To access the **Create Document** page, click on the **Add a Document** button on the contract header.

Contract Entry

Contract

SetID: SHARE

Contract ID: 00000000000000000000107831

*Status: Open

*Administrator/Buyer:

Contract Version

Version: 1 Status: Current

New Version

Approval Due Date:

Add a Document

On the *Document Type*, select a *Document Type* from the drop down menu.

The fields opens up for that Document Type. Enter information in the following required fields. Your agency may require other fields to be entered.

- *Administrator*: Validate or update this field.
- *CPV Contract Indicator* (Cooperative Purchasing Venture): Select an option.
- *Contract Type*: Select an option.
- *Sourcing Method*: Select an option.
- *Contract Manager*: Enter the Employee ID.
- *Statement of Purpose*: This field is open to the public. Enter a *Statement of Purpose* that is concise and clear.

Create Document

Source: Purchasing Contracts [Return to Document Search](#) [Return to Contract Entry](#)

SetID: SHARE Contract ID: 0000000000000000000097593

Vendor: ST PAUL CITY OF

*Document Type: Grant Contracts

Configurator ID: Configurator Selector

Description: CCGP-15-0009-Z-FY16

Additional Description:

*Administrator:

Sponsor:

Financial Department ID:

*CPV Contract Indicator: AGY

*Contract Type: GRK [Statement of Purpose](#)

*Sourcing Method: RFP

Agency Reference Field 1:

Agency Reference Field 2:

*Contract Manager:

Additional Approver:

Renewals Authorized (Months):

Renewals Available (Months):

Last Signature Date:

Retention Not to Exceed Amount:

Use Wizard Responses from Document: (<Select Document>)

Create Document Import Document

Save

[Return to Contract Entry](#) [Internal Contacts/Signers](#) [External Contacts/Signers](#) [Document View Access](#)

- After you enter the required information, click **Save**.

Recommendation: As an option, you can import a scanned copy of the fully executed contract.

(1) If you do not wish to import a scanned copy of the contract at this time, click the **Return to Contract Entry** link. On the header, update the status from “Open” to “Approved”.

(2) If you do wish to import a scanned copy of the contract, click the **Import Document** button. On the **Import Document** page, enter information that describes the document you will be importing.

- Select an **Import Option**.

Import Option

- Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)
- Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)
- Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- Original and Amendment**
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

- In the **Current Version** field, enter basic information about the contract document such as *Version*, *Status* and *Status Date*. Then, click the **Upload** button.

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1	Executed	06/01/2016		Upload	Clear

- The **Upload Contract Document** message appears. Click **Choose File**. When you have entered a file, click **Upload**.

Upload Contract Document ? Help

Choose File Procure to Pay Model.pdf

Upload Cancel

The **Current Version** field is updated to reflect the document that you uploaded.

- You can click on the *File Name* to check the document.
- When you are done, click the **Done with Import** button.

Type	File Name	Version	Status	Status Date	Status Time	Upload
Contract Document	Procure to Pay Model.pdf	1.00	Execute ▼	04/11/2016		Upload

Prior Version is not applicable

SWIFT displays the **Document Management** page. You can click the **View Document** button to see the document.

- After you have entered the document, click the **Return to Contract Entry** link.
- On the header, update the status from “Open” to “Approved”.

You have successfully entered a supplier contract copying from an existing contract.