SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated August 13, 2020

Add Attachments and Other Related Documents to a Contract Shell

You can add other files, either as document attachments or as related documents to a contract shell or contract document. Add attachments and other related documents on the *Document Management* page of an existing contract shell.

Attachments: An attachment is any document that you want to associate with the contract document. SWIFT does not generate these attachments. SWIFT stores them with the contract document. SWIFT also stores a history of the attachments along with each version. Sample contract document attachments include:

- Contract exhibits
- Scope of work
- Detailed pricing proposals supplied by the supplier
- Map or plan image

Related documents: These are documents that you created in a SWIFT procurement module including ad hoc documents. There are three types of related documents that you can link to a contract document. Most agencies only attach ad hoc documents.

- *Ad Hoc Documents*:
  Documents you already added on a contract such as a Non-Disclosure Agreements or Insurance Certifications.
- *Contract Documents*:
  Rarely used. SWIFT ties a contract to this contract document.
- *Purchase Order Documents*:
  Rarely used. SWIFT ties a purchase order to this contract document.

CAUTION: After you execute the contract documents, you can no longer add attachments or related documents to the SWIFT record.

Actions you can use for attachments and related documents:

- You can designate an attachment as external. You can email it to external contacts.
- You can also link to other documents that you defined in the document management system. These can be system-defined or imported documents that you manage using Supplier Contract Management.
- You can view attachments that exist on the Contract ID on its attachments page.

This guide provides the steps to add attachments and other related documents in SWIFT.

Steps to complete

- Step 1: Access the Document Management page for the contract document
- Step 2: Add an Attachment and/or Related Document

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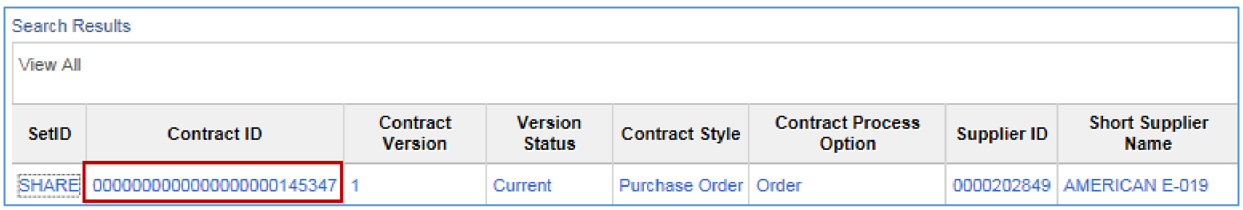
Steps to Add Attachments and Other Related Documents

These steps assume that the agency already created the contract shell for an attachment and/or used SWIFT to create a system-generated ad hoc contract document.

Step 1: Access the Document Management page for the contract document

Navigation Options	Navigation Path
Navigation Collection	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.

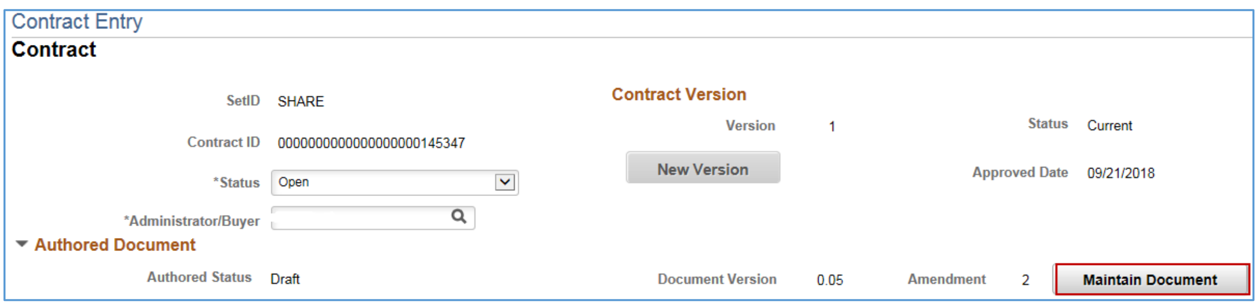
1. On the *Contract Entry* page, select the *Find an Existing Value* tab. Enter the *Contract ID*, then press the **Search** button.
2. On the *Search Results* section, press the link of the *Contract ID*.


Search Results

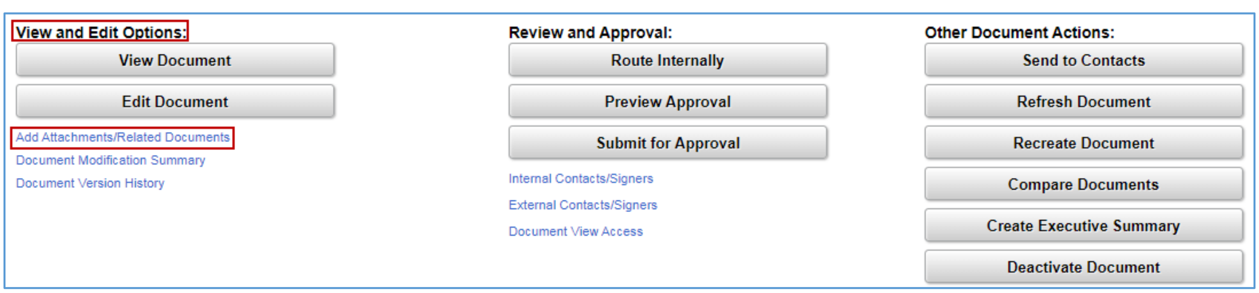
View All

SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name
SHARE	000000000000000000145347	1	Current	Purchase Order	Order	0000202849	AMERICAN E-019

3. SWIFT displays the *Contract Entry* page for that contract. Look to the top, right of that page and press the **Maintain Document** button.



4. SWIFT displays the *Document Management* page. Go to the bottom it the page and select the *Add Attachments/Related Documents* link.



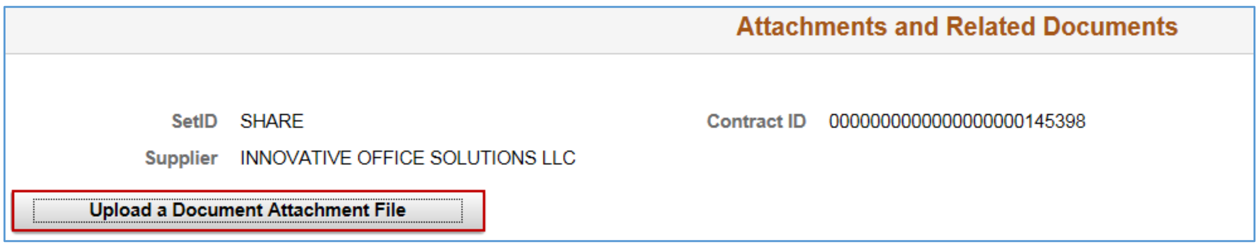
Step 2: Add an Attachment and/or Related Document

The *Attachments and Related Documents* page enables you to add either an attachment or related document to an existing contract document.

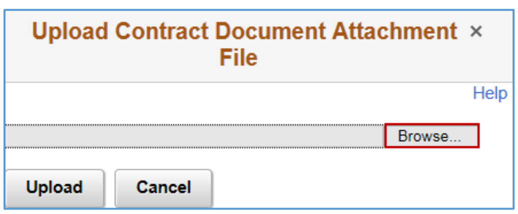
- **Attachment:** An attachment is any document that you want to associate with the contract document. Unlike contract documents, SWIFT does not generate these attachments. SWIFT stores them with the contract document. SWIFT also stores a history of the attachments along with each version.
- **Related documents:** These are existing documents that you created in a SWIFT procurement module. They include ad hoc, contract, or purchase order documents. You can only add a document once.

1. Add an attachment.

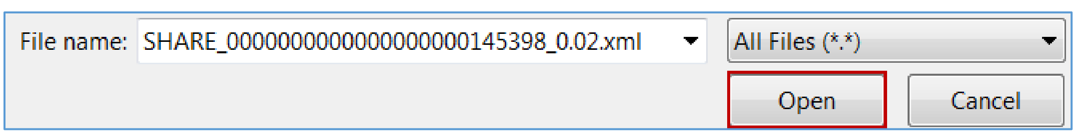
- Click the **Upload a Document Attachment File** button.



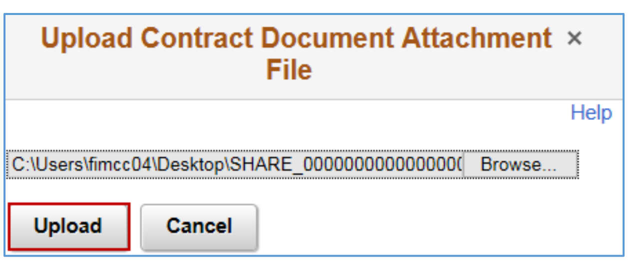
- SWIFT opens a dialog box to browse and select the attachment file to upload. Select **Browse**.



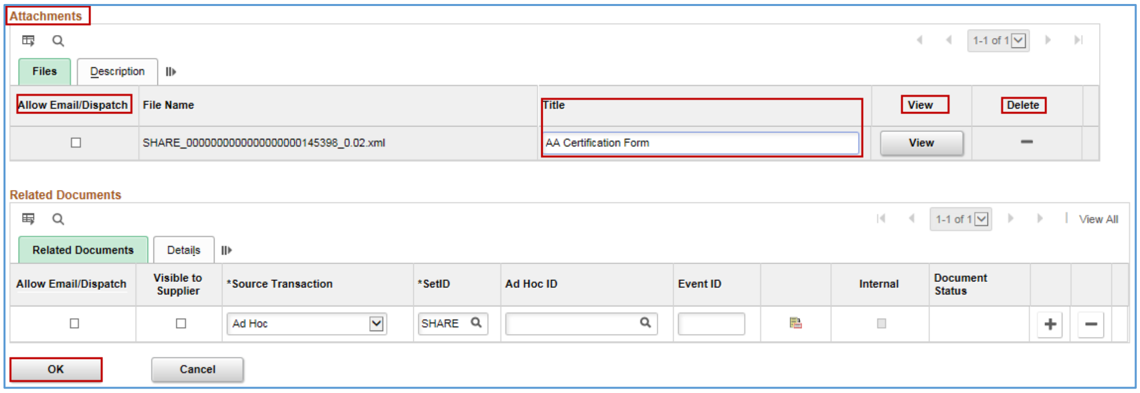
- SWIFT brings you to your desktop. Select the correct file and press **Open**.



- SWIFT returns you to the dialog box with the updated file. Select **Upload**.



SWIFT updates the *Attachments* section of the *Attachments and Related Documents* page. Review or complete these fields.



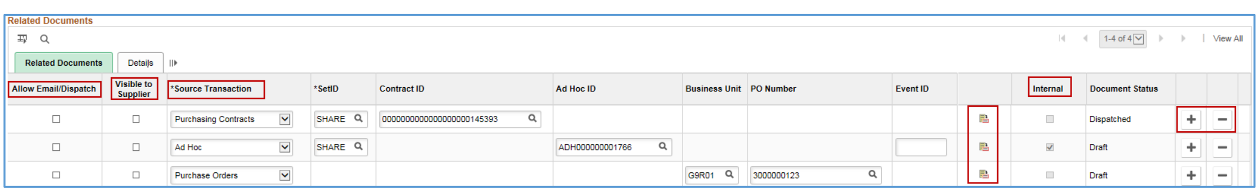
Fields on the Attachments tab.

Field Name	Field Description
Allow Email/ Dispatch check box	Decide if the attachment should be available to others when you send or dispatch the main contract document. To make the file available for SWIFT to emailed or dispatch, click the **Allow Email/Dispatch** box. SWIFT will send this file to anyone you approve to send the contract document. You can override this checkbox before sending out the contact document and its attachments.
Title	Enter a description of the attachment. SWIFT includes this description in history records. You can enter up to 254 characters in the field.
View button	Press to open a read-only copy of the selected attachment.
Delete button	Press to remove an attachment from the document. SWIFT removes the attachment immediately. You must select **OK** to save the page and the deletions.

- To add more attachments, press **Upload another Document Attachment File** and follow the same steps.
- If you are done and do not wish to add another attachment or a related document, select **OK**.

2. Add a related document.

Related documents are system-generated documents within SWIFT. SWIFT will allow you to access these documents with their SWIFT ID.



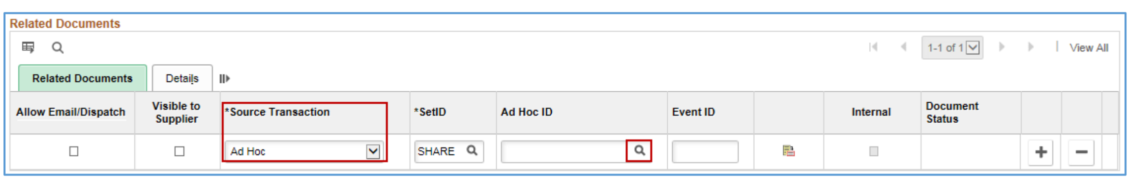
Fields on the Related Documents tab.

Field Name	Field Description
Allow Email/ Dispatch check box	Decide if the attachment should be available to others when you send or dispatch the main contract document. • To make the file available for SWIFT email or dispatch, click the **Allow Email/Dispatch** box. SWIFT will send this file to anyone you approve to send the contract document. • You can override this checkbox before sending out the contact document and its attachments. • The related document must be in "Complete" Status in order to be sent. Documents in "Draft" Status cannot be sent.
Visible to Supplier check box	Select this checkbox to indicate whether SWIFT should make the document available to the supplier. Suppliers who log in to the Supplier Portal for collaboration or signatures would be able to view this related document. **CAUTION:** Some internal documents should not be publicly available.
Source Transaction	Displays whether the document is an ad hoc, purchase order, or purchasing contract document. Typically, agencies use the ad hoc option. Based on the values that you select in this field, the system opens up fields.
Set ID	Defaults in as "SHARE."
Add Row or Delete Row icons	You can add another related document or delete one using the "+" or "-" icons at the end of the row.

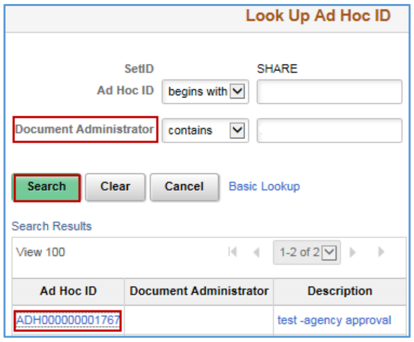
Source Transaction Options:

(A) Ad Hoc:

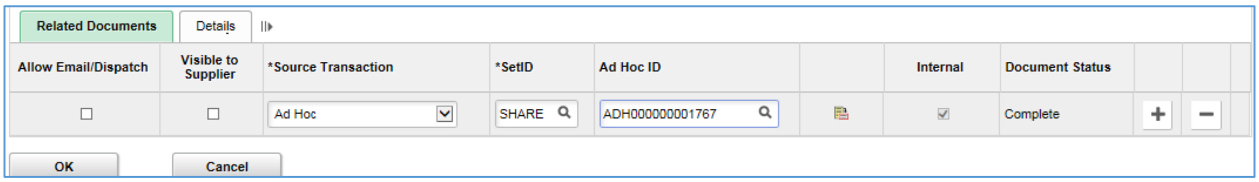
Select "Ad Hoc" in the *Source Transaction* field. SWIFT opens up the *SetID* and the *Ad Hoc ID*. Select the **Looking Glass** icon.



SWIFT opens the *Look Up Ad Hoc ID* page. Enter the *Ad Hoc ID* if you know it. Or, you can search by *Employee ID* to find all ad hoc contract documents you created. Select desired *Ad Hoc ID*.

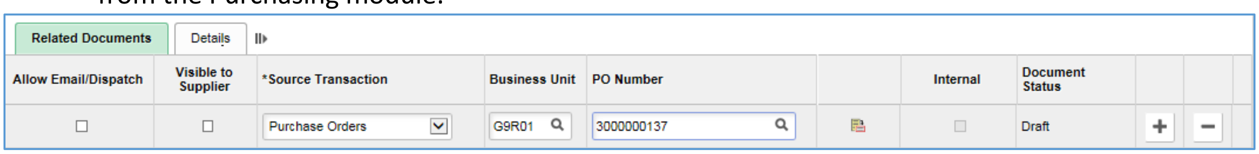


SWIFT updates the *Related Documents* tab.



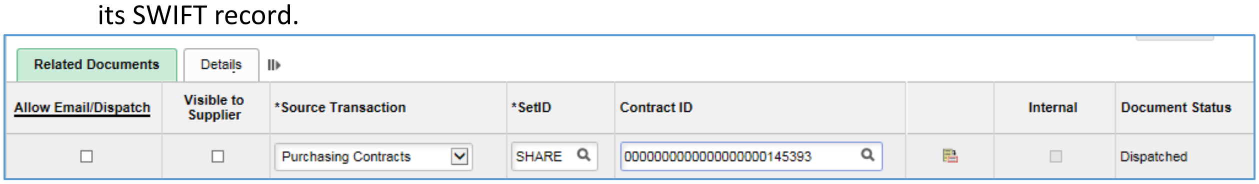
(B) Purchase Orders: Rarely used.

- Select “Purchase Order” in the *Source Transaction* field. SWIFT opens up the *Business Unit* and *PO Number*.
- Enter the *PO Number* or use **Looking Glass** icon to find it.
- You cannot use the *Allow Email/Dispatch* option because SWIFT dispatches purchase orders from the Purchasing module.



(C) Purchasing Contracts: Rarely used. You cannot attach the current contract.

- Select “Purchasing Contracts” in the *Source Transaction* field. SWIFT opens the *Contract ID* field.
- Enter the *Contract ID* or click on the **Looking Glass** icon to find it.
- You cannot use the *Allow Email/Dispatch* option because SWIFT dispatches contracts within its SWIFT record.



When you have completed adding related documents, go to the bottom of the page and select **OK**. SWIFT returns you to the *Document Management* page.

If you are using SWIFT to route the contract document for electronic signatures, you can specify which signers can view which attachments in DocuSign

You have successfully added attachments and other related documents.