

QUICK REFERENCE GUIDE

Updated August 19, 2020

Amend a Contract Document Created Electronically

There are two ways to make changes to a contract document in SWIFT after you create it.

- (1) **Recreate the contract document.** Use this method before you fully execute the contract document.
- (2) **Amend the contract document.** Use this method after you fully execute the contract document. This topic covers only the amendment process.

A contract document amendment is an update to an existing executed contract document. An amendment update can result from changes in source transactions or changes in contract terms in the document.

Processing amendment documents is like processing a system-generated contract document. It uses document configurators for amendment contract documents. SWIFT processes functions such as viewing and editing documents, collaboration, approval, and electronic signatures the same as for the original document.

If you executed the original contract document by importing it, you must use this system-generated process for an amendment.

This guide provides the steps to amend a contract document in SWIFT.

Steps to complete

- Step 1: Access the Document Management page
- Step 2: Amend the contract document

Steps to Amend a Contract Document

Step 1: Access the Document Management page

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*.
3. SWIFT displays the *Contract Entry* page for that contract shell. In order to amend a contract document, the *Status* must be "Open." Select the **Maintain Document** button on the right side of the page.

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option: Amendment Files Only

Amendment Configurator ID: P/T CONTRACT AMEND

Version: Minor Version (0.02) Major Version (1.00)

*Comments: Amendment Created: Amending the contract to increase the amount and to extend the date

167 characters remaining

OK Cancel

SWIFT returns you to the *Document Management* page.

- Note that the status is now “Draft.” The buttons are back at the bottom of the page.
- You also now have **View Original Document** or **View Amendment File** buttons.
- When you route the amended contract document to collaborators, they can choose to view the original contract document and the amended version. If authorized, they can edit the amended contract document.

3. Select the **Edit Amendment File** button.

Amendment 1	Created On 03/14/18 12:00AM	Document Details
Version 1.01	Amended On 09/23/19 10:06AM	
Status Draft	Last Modified On 09/23/19 10:06AM	

Includes Imported Document

<p>View and Edit Options:</p> <p>View Original Document</p> <p>View Amendment File</p> <p style="border: 1px solid red;">Edit Amendment File</p> <p>Add Attachments/Related Documents Document Modification Summary Document Version History</p>	<p>Review and Approval:</p> <p>Route Internally</p> <p>Route Externally</p> <p>Preview Approval</p> <p>Submit for Approval</p> <p>Internal Contacts/Signers External Contacts/Signers Document View Access</p>	<p>Other Document Actions:</p> <p>Send to Contacts</p> <p>Refresh Document</p> <p>Recreate Document</p> <p>Import Prior Document</p> <p>Deactivate Document</p> <p>Generation Log</p>
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- SWIFT updates the *Document Management* page to reflect that you checked out the contract document.

Amendment 1	Created On 09/25/18 10:23AM	Document Details
Version 0.02	Amended On 09/25/18 3:10PM	
Status Draft	Last Modified On 09/25/18 3:19PM	
	Checked Out On 09/25/18 3:19PM	
	Checked Out By	

- SWIFT creates and downloads a Word version of the system-generated contract amendment document based on the official State of Minnesota amendment template. It creates a message on your desktop.

4. Select **Open**.



5. SWIFT opens the contract amendment document. Edit and save the checked-out amendment document.

IMPORTANT! DO NOT change the title of it or SWIFT will not be able to recognize it.

Professional/Technical Contract Amendment

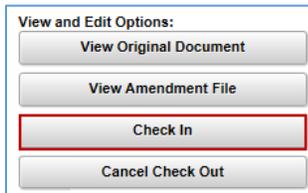
State of Minnesota

SWIFT Contract No.: 000000000000000000000000145347

Contract Start Date:		Total Contract Amount:	\$
Original Contract Expiration Date:		Original Contract:	\$
Current Contract Expiration Date:	[IF APPLICABLE]	Previous Amendment(s) Total:	\$
Requested Contract Expiration Date:	[IF APPLICABLE]	This Amendment:	\$

This amendment is by and between the State of Minnesota, through its Commissioner of [INSERT AGENCY NAME] ("State") and [CONTRACTOR'S FULL LEGAL NAME AND ADDRESS] ("Contractor").

6. When you are ready, check in the Word document. On the *Document Management* page, press the **Check In** button.



- SWIFT opens the *Check In Document* page. Add comments and select **OK**.

Check In Document

Select the desired versioning option and enter a brief description describing the changes. Select the OK button to proceed and you will then be prompted to enter the filename.

SetID: SHARE Contract ID: 000000000000000000000000145347

Supplier: AMERICAN ENGINEERING TESTING INC

Version: Minor Version (0.03) Major Version (1.00)

*Comments: 176 characters remaining

- SWIFT displays the *Check In Amendment File* message. Select the **Browse** button.

