

Overview of Changes in Supplier Contract Module

August 17, 2020

The Office of State Procurement (OSP) greatly enhanced SWIFT's Supplier Contract module to help agencies process contract documents electronically.

There are important details related to the correct use of these enhancements. Please review the SWIFT reference guides in the Supplier Contract module for the details of these changes.

1. **Agencies can now import a contract document created outside of SWIFT and process it for electronic approvals and signatures.** These changes allow agencies to take advantage of the signing capabilities available in SWIFT's version of DocuSign.

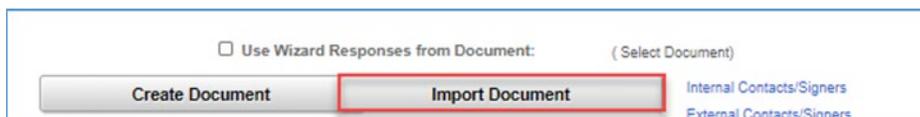
There are enhancements in SWIFT impacting both imported and system-generated contract documents.

2. There are two different signature processes for DocuSign signatures: PDF for imported contract documents and Word for system-generated contract documents.
3. Agencies can specify which signers can view which attachments being routed with the contract document.
4. Agencies can now use the Carbon Copy (cc) functionality when routing for eSignatures.
5. Group signing functionality has been added to allow sending the contract to multiple users where one member of the signing group signs for the group. Current group signing is for Professional/Technical contract document signatures. Agencies may request group signing setup to assist in the signing process.

1. Import and process a contract document for electronic signatures

Agencies can submit the imported contract document for approvals in SWIFT and then route it for signatures in DocuSign. SWIFT has two different processes for creating and processing a contract document in SWIFT. Both require that agencies submit the contract document for approvals within SWIFT. Agencies can set them up for self-approvals.

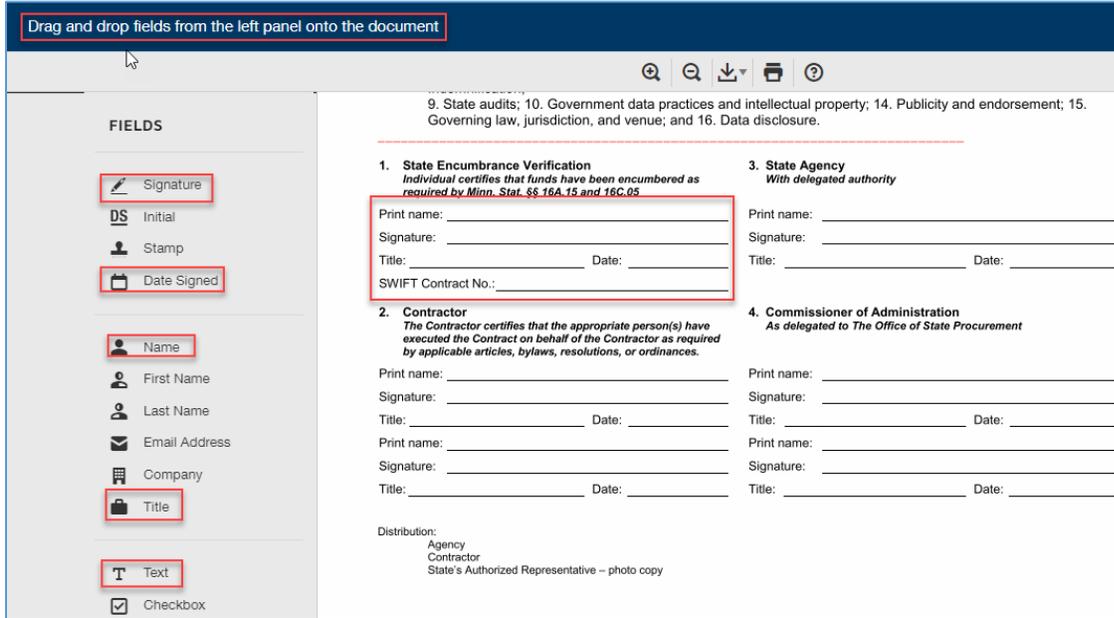
- Select **Import Document** and import a contract document created outside of SWIFT.
- Select **Create Document** and SWIFT will generate the contract document using the document configurator process with existing templates from OSP.



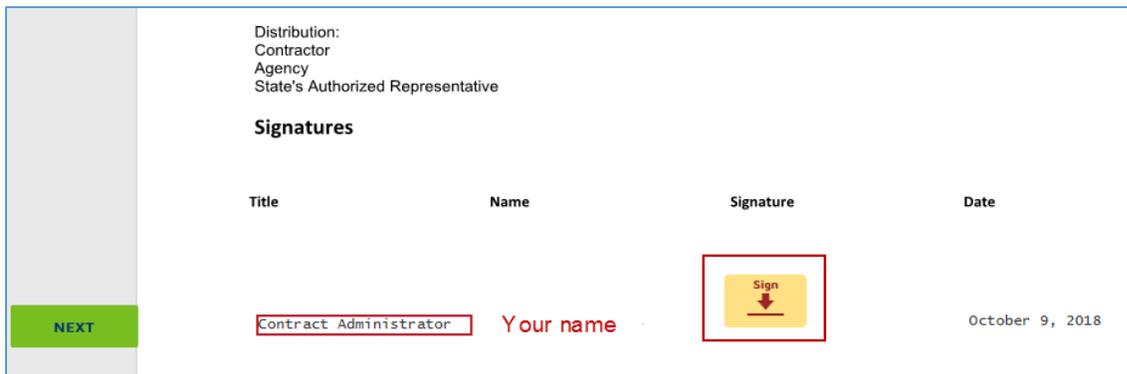
2. Two different signature processes for DocuSign signatures

DocuSign handles the signatures for imported and system-generated contract documents differently.

- **Imported documents** become PDF documents in DocuSign and then in SWIFT after signatures. Signers need to drag their signature data to the signature block in DocuSign.



- **SWIFT-generated contracts** are Word documents in DocuSign and SWIFT. The signature block is embedded into these documents. Signers need to approve their signatures in DocuSign.



In both cases, SWIFT completes the signature block after all required signatures are completed.

Signatures			
Title	Name	Signature	Date
State Encumbrance	Jeanette	DocuSigned by: Jeanette	February 7, 2020
Team Leader	JEFFREY	DocuSigned by: JEFFREY	February 7, 2020
Supervisor	Heidi	DocuSigned by: Heidi	February 7, 2020

3. Agencies can specify which signers can view which attachments in DocuSign

Agencies can specify which signers can view which attachments being routed with the contract documents using SWIFT's *Visibility* feature. Senders can set *Document Visibility* within SWIFT that allows the sender to unselect attachments and/or ad hoc documents from view of specific signers in DocuSign.

Visibility to Recipient								
Visible to Recipient	Email	User	Signing Group ID	Signing Group Name	Recipient Name	Carbon Copy	Sign Order	External Signer
<input type="checkbox"/>	SWIFTTRN02@yahoo.com				OSP Help Line	<input type="checkbox"/>	5	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SWIFTTRN02@yahoo.com				Encum Signer	<input type="checkbox"/>	1	<input type="checkbox"/>
<input type="checkbox"/>	SWIFTTRN02@yahoo.com				Supplier Signer	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	SWIFTTRN02@yahoo.com				State Agency Signer	<input type="checkbox"/>	3	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SWIFTTRN02@yahoo.com		517922	Admin OSP-PT	Admin OSP-PT	<input type="checkbox"/>	4	<input type="checkbox"/>

4. Carbon Copy (cc) functionality when routing for signatures

Agencies can check the **Carbon Copy** box to route the contract document to a staff person. They will be able to see the contract document from an email from DocuSign. They can only view the contract document. Leave the *Sign Order* field blank when using *Carbon Copy*.

Email Address	Identity Authentication									
Email	User	Signing Group ID	Signing Group Name	Recipient Name	Carbon Copy	Sign Order	External Signer	Admin Id Entry Only		
Supplier Email				Company Signer	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
State Staff Email				Agency Signer	<input type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>	+	-
ptcontracts.ADM@state.mn.us		517922	Admin OSP-PT	Admin OSP-PT	<input type="checkbox"/>	3	<input type="checkbox"/>	<input type="checkbox"/>	+	-
State Staff Email					<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	+	-

5. The group signing functionality allows for sending to a signing group for a signature step in DocuSign.

Currently, group signing is setup for Professional/Technical (P/T) contract documents. When routing to a signing group, each member of the signing group is notified when an envelope is received for signature. Only one member of the group can sign the contract. Or when a shared email address is used, only one member of the shared email box may sign the envelope.

- Use group signatures for *OSP P/T* contract signers.
- Use group signatures for routing to the *OSP Help Line* to assign the *Admin ID* to record and track the contract in *OSP's P/T Contract* database.

IMPORTANT: The *OSP Help Line* signing group defaults into the *Signers* page for system-generated and imported contract documents. Use the minus sign to remove this signature line for grant and acquisition contract documents not routed to the *OSP Help Line* for tracking.

Send Document for Signing

SetID: SHARE Contract ID: 000000000000000000000000179901

Supplier: ASFALIS GLOBAL

Signing Order: Sign based on Sign Order

Send To: Recipients

Email	User	Signing Group ID	Signing Group Name	Recipient Name	Carbon Copy	Sign Order	External Signer	Admin Id Entry Only		
Encumb.Signer@state.mn.us				Encumb Signer	<input type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>		+ -
Supplier.Signer@Supplier.com				Supplier Signer	<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		+ -
Agency.Signer@state.mn.us				Agency Signer	<input type="checkbox"/>	3	<input type="checkbox"/>	<input type="checkbox"/>		+ -
pcontracts.ADM@state.mn.us		517922	Admin OSP-PT	Admin OSP-PT	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>		+ -
OSPHelp.Line@state.mn.us		518135	OSP Help Line	OSP Help Line	<input type="checkbox"/>	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>		+ -