

QUICK REFERENCE GUIDE

Updated August 18, 2020

Understand Document Configurators in SWIFT's Supplier Contract Module

In order to create and process a contract document electronically through SWIFT, you will need to choose the correct "document configurator."

Based on the document type you select, SWIFT uses document configurators or wizards to set up the correct contract document template. In some cases, you will need to respond to a series of questions to guide SWIFT in selecting the appropriate configurator.

Currently, there are Document Configurators for only these contract documents.

ALP and Acquisitions	A group of different contracts for purchases and acquisitions within the Authority for Local Purchase (ALP) for a buyer or contract coordinator.
Grant Contracts	Contracts that are financial assistance or services furnished by the agency via a third party to an eligible recipient.
Professional/ Technical Contracts	A group of different contracts for professional or technical services (P/T). P/T services are intellectual in character, including consultation, analysis, evaluation, predication, planning, or programming, or recommendation, and result in the production of a report or the completion of a task. P/T contracts do not include the provision of supplies or materials except by the approval of the commissioner (of Administration) or except as incidental to the provision of professional or technical services.

Each of these document configurators contain the contract document templates that are currently available for that document type. The Office of State Procurement or the Office of Grants Management may update these templates.

All the examples in this guide assume that an agency buyer has already created the contract shell. The buyer now wants to create and process a contract document electronically through SWIFT. The buyer also has accessed the contract shell and the *Document Management* page for that contract shell.

This guide provides an overview each of the document configurators.

- Document Configurator for ALP and Acquisitions Contracts
- Document Configurator for Grant Contracts
- Document Configurator for Professional/Technical Contracts

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- Signature Process: “Electronically” or “On Paper”
- Select **Finish**.

Wizard Execution

Help

Configurator Selection Wizard

SetID: SHARE
Wizard ID: MMD_ACQ FORMS Description: Acquisition Forms

Question Groups 1 of 1

Question Group: MMD_ACQ_FORMS Previous Finish

Questions

^*Select your contract from the list: Contract Award

^*What signature process do you want to use? Electronically

3. SWIFT returns you to the *Create Document* page. After completing the Create Document form, go to the bottom of the page and select **Save** and then **Create Document**.

Create Document Import Document

Save

4. SWIFT opens up the *Wizard Execute – Document Creation* page for Acquisitions. Respond to the questions. Then, select **Finish**.

NOTE: It doesn’t matter if you answer “Yes” or “No” to any of the questions. SWIFT will not add new questions or bring up additional windows to respond to.

Wizard Execution

Help

Wizard Execute - Document Creation

Wizard ID: MMD_ACQ_CNTR AWARD 9 Description: Acquisitions Contract Award 9

Question Groups 2 of 2

Question Group: MMD_ACQ_CNTR AWARD 9 Previous Finish

Questions

What is the date of this document? 11/01/2018

Will insurance be required? Yes

Does the Contract Vendor need to complete the EFT Form? No

Does the Contract Vendor need to complete the New Hire Form? No

5. SWIFT displays the *Document Management* page. Press the **Edit Document** button.

Fields on the Configurator Selection Wizard for Grant Contract document type.

Field Name	Field Description
Office of Grants Management Documents	<ul style="list-style-type: none"> Competitive Grant Contract Agreement for Nongovernmental Organizations Grant Agreement for Nongovernmental Organization Single Source or Formula Grant Contract Agreement for Individuals Legislatively-named Grant Contract Agreement for Nongovernmental Agencies Legislatively-named Grant Contract Agreement for Municipalities Municipal Grant Contract Agreement U of MN Grant Agreement
Agency-Specific Documents	<ul style="list-style-type: none"> Health: <ul style="list-style-type: none"> MDH Grant for the University of Minnesota MDH WIC Grant Agreement MDH WIC Project Agreement Standard MDH Grant Agreement

- SWIFT returns you to the *Create Document* page. After completing the Create Document form, go to the bottom of the page and select **Save** and then **Create Document**.



- SWIFT opens up the *Wizard Execute – Document Creation* page for grant contract documents. Answer the question and press **Finish**.

Wizard Execute - Document Creation

Wizard ID: OGM GRANT CONTRACTS Description: OGM Grant Contracts Wizard

Wizard Instructions: Please answer the following questions.

Question Groups 1 of 1

Question Group: SIGNATURES Previous **Finish**

Group Instructions: Please answer the following question:

Questions

****Are you collecting signatures electronically?** Yes

- SWIFT displays the *Document Management* page. Press the **Edit Document** button.

Question Groups 1 of 1

Question Group: PROFESSIONAL/TECHNICAL CNTRCTS

Group Instructions: Please answer the following questions to select the P/T document you need.

Previous Finish

Questions

**Do you know what P/T Document template you need?

**Is your agency paying money or receiving money?

**Is this an enterprise activity?

**Is your contract with another governmental unit?

**Does your project involve Information Technology P/T services?

**Does your agency already have a Master Contract in place with vendors to provide these services?

No

Paying

No

No

No

No

No

If you select “Paying” and “No” for the questions, SWIFT will eventually create a P/T Services contract template for your use.

- b. Here are the options if you select “Yes” to *Do you know what P/T Document template you need?*

Fields on the Document Configurator for Professional/Technical Contract document type.

Field Name	Field Description
Agency Specific Document	Several state agencies worked with the Office of State Procurement to add their specific contracts: <ul style="list-style-type: none"> • Employment and Economic Development • Pollution Control
Enterprise Opportunities	Agency contracts between two enterprise-wide entities: <ul style="list-style-type: none"> • Enterprise LEAN (Continuous Improvement) • MN.IT
Income Agreement	Brings money into state agency accounts rather than expend money from those accounts. However, they are processed as contracts to protect the agency and the state from liability and to clearly define who is responsible for what. <ul style="list-style-type: none"> • These contracts have all kinds of names: use permits, leases, rental agreements, etc.; however, they are really contracts. • Check with your assistant attorney general to determine if the "form" you are using provides you with the protection from liability and risk that you need. • Ensure that your agency has the authority to accept payment for services it provides and that your accounting office has provided you the instructions necessary to get the funds into the proper account.

Field Name	Field Description
Interagency Agreement	A contract between two or more state agencies.
Joint Powers Agreement	A joint powers agreement is an arrangement between a state agency and another governmental unit to share resources, do work for each other, share work, etc. Although these arrangements can take many forms, they are considered agreements.
P/T Contract	Generally, professional/technical services contract may be used when: <ul style="list-style-type: none"> • An agency requires highly specialized work, for which no qualified state employee is capable or available; • OR state employees do not have the time to perform the work required; • OR a contract is determined to be the most efficient and least costly method of accomplishing the work.
P/T Contract & Exhibit	P/T Contract document that includes a list of exhibits.
P/T Master Contract	A Master Professional/Technical Services Contract is an umbrella document that provides the general frame work for using services of multiple contractors. A master contract program is not set up with just one vendor. The contract document identifies, in detail, rates, conditions and products for each kind of service defined for multiple contractors. It also very specifically identifies how to use the service, the specific document that is to be used and how it is to be filled out.
P/T Work Order Contract	A work order contract: <ul style="list-style-type: none"> • Is issued from a master contract; • Is THE legally binding document (when it incorporates the Master Contract in to it); • Has funds encumbered against it; • Gives the specific tasks to be completed; and • Gives the specific information about compensation to the contractor.
University of Minnesota Agreement	Contract between a state agency and the University of Minnesota for P/T services.

3. After you select **Finish**, SWIFT returns you to the *Create Document* page. Go to the bottom of the page and select **Save** and then **Create Document**.



SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- SWIFT opens up the *Wizard Execute – Document Creation* page for P/T contract documents. Answer the question and press **Finish**.

Question Group SIGNATURES

Group Instructions Please answer the following question:

Questions

^*Are you collecting signatures electronically? Yes

Previous Finish

- SWIFT displays the *Document Management* page. Press the **Edit Document** button.

View and Edit Options: View Document Edit Document

Review and Approval: Route Internally Preview Approval

Other Document Actions: Send to Contacts Refresh Document

- SWIFT creates a Word contract template for this *Contract ID*. Open it up.

Do you want to open or save SHARE_000000000000000000000000145372_0.00.xml from fms.systems.state.mn.us? Open Save Cancel x

7. SWIFT creates a Word contract template for this *Contract ID*. Update the Word document and process it as needed.

<p style="text-align: right;">Professional and Technical Services Contract</p> <p style="text-align: right;">State of Minnesota</p> <p style="text-align: right;">SWIFT Contract No.: 000000000000000000124423</p> <p><i>Instructions:</i> <i>Instructions for completing this form are in red italics. Fill in every blank and delete all instructions before sending this to the Contractor. Include an encumbrance worksheet in order to assist with encumbering the money for this Contract.</i></p> <p>This Contract is between the State of Minnesota, acting through its Example: "Commissioner of [insert name of agency or board]" or "Director of [insert name]" ("State") and [Give the full name of the Contractor] whose designated business address is [insert business address.] ("Contractor").</p> <p>Recitals</p> <ol style="list-style-type: none">1. Under Minn. Stat. § 15.061 <i>[Insert additional statutory authorization if necessary.]</i> the State is empowered to engage such assistance as deemed necessary.2. The State is in need of <i>[Add brief narrative of the purpose of the Contract.]</i>3. The Contractor represents that it is duly qualified and agrees to perform all services described in this Contract to the satisfaction of the State.
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8. Continue to process this P/T contract document according to the SWIFT reference guides and your agency's policies.

You have successfully reviewed document configurators in SWIFT's Supplier Contract module.