

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create a Contract Document Electronically

The primary feature of SWIFT Supplier Contract Management is the ability to create, manage and track contract documents electronically. Because all documents are contained within SWIFT, there is no need to print, physically distribute or file contract documents. Agencies can execute a final contract document in SWIFT.

To create a contract document, SWIFT sets up contract document templates called “Configurators” in SWIFT. The Office of State Procurement (OSP) approves and uploads the templates of official contract documents.

This guide presents the steps to create a contract document electronically through SWIFT. It assumes that you have already created the contract shell.

Steps to complete

- Step 1: Access the contract shell in SWIFT
- Step 2: Add a document
- Step 3: Select the Document Type and Document Configurator for that type
- Step 4: Answer the questions on the Configurator Select Wizard page
- Step 5: Answer the questions on the Wizard Execute – Document Creation page
- Step 6: Process the contract document within SWIFT.
- Step 7: Complete the contract document

Steps to Create a Contract Document Electronically through SWIFT

Step 1: Access the contract shell in SWIFT

Navigation Options	Navigation Path
Navigation Collection	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.
WorkCenter	Procurement, Supplier Contract, Contract/Sourcing WorkCenter. Left menu Links, Add/Update Contracts, Contract Entry page.

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*.

Document Type	Description
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.

2. Press the **Configurator Selector** button.

Step 4: Answer the Questions on the Configurator Select Wizard page.

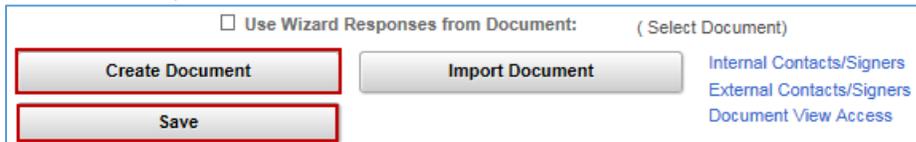
SWIFT opens up the **Configurator Select Wizard** page. This page provides questions to answer. SWIFT will build your document depending upon how you answer the questions.

- The document template includes the necessary clauses and legal language for your contract document.
- In the example below, on the first question, you need to select “Yes” to build your contract document electronically in SWIFT.
- The Office of State Procurement in the Minnesota Department of Administration can provide information about these contract documents. <http://www.mmd.admin.state.mn.us/>

1. Answer the questions. When you are done, select **Finish**.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

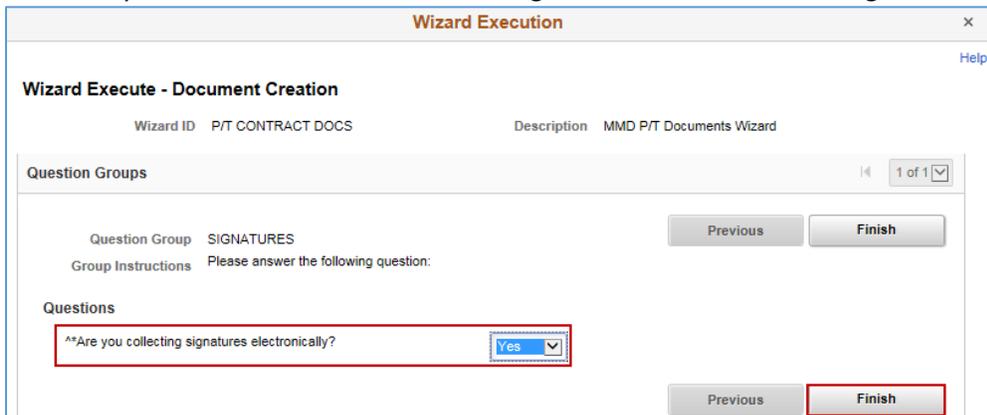
2. SWIFT returns you to the **Create Document** page.
 - View the *Configurator ID* to make sure you select the right Configurator and contract document.
 - Confirm or enter the *Contract Manager*. This person becomes part of the workflow for approvals.
 - If the contract shell is self-approved, enter the same Employee ID in the *Contract Manager* and *Administrator* fields.
 - When you have entered all the necessary information, you can create the document immediately.
3. Press the **Save** button at the bottom of the page.
4. Then, press the **Create Document** button.



SWIFT will open up the **Wizard Execute – Document Creation** page.

Step 5: Answer the Questions on the Wizard Execute – Document Creation page

1. On the **Wizard Execute – Document Creation** page, answer the question about electronic signatures.
 - If you answer “Yes,” SWIFT creates a grid for electronic signatures on the contract document.
 - If you answer “No,” SWIFT creates signature blocks for manual signatures.



- You have the opportunity to change your response later if the signature requirements change.
2. When you are done, click **Finish**.

Step 6: Process the Contract Document within SWIFT.

SWIFT displays the **Document Management** page.

1. As an option, you can view the contract document before you update it. Select **View Document**.

View and Edit Options: <input type="button" value="View Document"/> <input type="button" value="Edit Document"/> Add Attachments/Related Documents Document Modification Summary Document Version History	Review and Approval: <input type="button" value="Route Internally"/> <input type="button" value="Route Externally"/> <input type="button" value="Preview Approval"/> <input type="button" value="Submit for Approval"/>	Other Document Actions: <input type="button" value="Send to Contacts"/> <input type="button" value="Refresh Document"/> <input type="button" value="Recreate Document"/> <input type="button" value="Compare Documents"/>
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- SWIFT creates a Word document that includes a cover letter, the contract and any attachments you selected. SWIFT will not save or process any updates to the Word document.
2. Check out the contract document.
 - When you are ready to process the contract document within SWIFT, select the **Edit Document** button.
 - SWIFT opens up a Word document with the contract document. Essentially, you have checked out the document for you to edit.
 3. Edit the contract document with the contract requirements following your agency procedures.
 4. Save the contract document on your computer.
 - **WARNING! DO NOT** change the file name. SWIFT will only accept the same file to be checked in.
 - **As a best practice**, use the track changes in Word. It should default. Make sure to turn on this feature before editing the document. When editing is complete, go back, review and accept all changes before saving the file.
 - The **Document Management page** shows that the document is checked out, when, and by whom. As long as the document is checked-out, only that person can make or save changes.
 - Other users can view the document. While you check out the document, SWIFT disables other functions on the page (e.g., routing for approvals).

Version 0.00	Created On 09/25/18 10:23AM	Document Details
Status Draft	Last Modified On 09/25/18 10:28AM	
	Checked Out On 09/25/18 10:28AM	
	<input type="button" value="Checked Out By"/>	
View and Edit Options: <input type="button" value="View Document"/> <input type="button" value="Check In"/> <input type="button" value="Cancel Check Out"/>	Review and Approval: Internal Contacts/Signers External Contacts/Signers Document View Access	Other Document Actions: Generation Log

5. Check in the contract document.
 - When you are ready to upload the revised Word version into SWIFT, return to the **Document Management page** for the specific contract document.
 - Press the **Check In** button at the bottom of the page.
 - **NOTE:** If you need to back out of editing the document, press the **Cancel Check Out** button. This uploads the document back to SWIFT in its original format and discards any changes you might have made.

