

QUICK REFERENCE GUIDE

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Create a Supplier Contract by Copying from an Existing Contract

A commonly used feature of SWIFT is the ability to create a contract shell from an existing contract shell. The benefit is clearly the time saved from keying in the data fields (e.g., update annual plans). Also, there can be a quality control if you are copying many contracts (e.g., grants) from one contract.

Use SWIFT’s Supplier Contracts module to record specific contractual relationships. The contract contains purchase information such as item, quantity, freight terms, shipping terms, payment terms, shipping instructions, etc. Agencies can create purchase orders from the contracts when there is a need for goods or services from a supplier.

This guide reviews the basic steps to create a supplier contract shell by copying from an existing contract in SWIFT. Creating a contract document from that contract shell is a separate process.

For more information about creating and managing supplier contracts, refer to the SWIFT reference guides.

Steps to complete

- Step 1: Navigate to the Contract Entry page
- Step 2: Copy a contract
- Step 3: Review and complete the record
- Step 4: Enter information on the Create Document section
- Step 5: Update the Status

Step 1: Navigate to the Contract Entry page

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.

On the **Contract Entry** page, select the **Add a New Value** tab and press the **Add** button.

- SWIFT automatically populates the *SetID* with “SHARE”
- Leave the *Contract ID* with the default of “NEXT”. Do not change this field. SWIFT will assign the next available number.
- On the *Contract Process Options*, ALWAYS select “Purchase Order” from the drop down menu.

NOTE: The State of Minnesota does not use the other *Contract Process Options* because of State Statute 16.A.15. www.revisor.leg.state.mn.us/statutes/?id=16a.15

Contract Entry

Find an Existing Value Keyword Search **Add a New Value**

SetID

Contract ID

Style ID

Contract Process Option

Add

Step 2: Copy the contract

1. On the header, press the **Copy from Contract** link.

Contract Entry

Contract

SetID SHARE **Copy From Contract** **Contract Version**

Contract ID NEXT Version 1 Status Current

*Status Approval Due Date

2. SWIFT opens up the **Copy Contract** page. Enter search criteria such as the Contract ID. Press the **Search** button.

Copy Contract

SetID SHARE

Contract ID NEXT

Contract Search

Contract ID

Supplier

Supplier ID

OSP Contract Release Nbr/T-Nbr

Allow Open Item Reference

Search

SWIFT displays the search results at the bottom of the **Copy Contract** page.

3. Check the **SEL** box next to the *Contract ID* that fits your search results. Press the **OK** button.

Contracts	More Details					
Sel	Contract ID	Version	Description	Supplier ID	Short Supplier Name	Supplier Contract Ref
<input checked="" type="checkbox"/>	000000000000000000000000145343	1	Hazardout Hygiene Services	0000202849	AMERICAN E-019	

OK Cancel Refresh

Step 3: Review and complete the contract shell

SWIFT copies over all of the details of the original contract. SWIFT populates the header, PO Defaults and line fields.

1. Review and update the header information.

As needed, enter information in the following fields. Also, enter other fields that are needed for your specific contract or agency requirements.

Fields on the header of the Contract Entry page. Required fields are marked with an “*”.

Field Name	Field Description
Status	This field defaults to “Open” when you first enter a new contract. See the table below with a full description of the contract Statuses.
* Administrator/ Buyer	Add the Administrator/Buyer using the drop down menu. You can search by Buyer ID or by Name. Typically, the person entering the contract shell is the Administrator/Buyer.
* Supplier ID	A ten-digit identification number assigned to a supplier.
* Begin Date	Defaults to the current date. Depending upon the type of contract, you can update this field.
Expire Date	The date when the contract will expire. This field is not required for some document types. It is beneficial to enter the Expire Date to trace expiring contracts.
Supplier Contract Ref	Reference to identify a supplier contract number or some other identifier by which the supplier identifies this contract. The value can be used in searching for contracts.
* Description	Description of the contract. This field is available on reports. Most agencies create a standard use of these fields (e.g., Fiscal Year, Project/Grant and Purpose of Contract).
OSP Contract Release Nbr/T-Nbr	The Contract Release/T-Number represents one or more contracts in related groups. It is required for contracts created from master contracts.
Exempt From WFC	Buyers can check this box if they have received a signed copy from the supplier stating that they are exempt from the Minnesota Department of Human Rights (MDHR) WorkForce Certification (WFC).
* Maximum Amount	Total amount that this contract should not exceed. The total released amount of all lines and the total amount for all category lines plus the amount released for open items must not exceed this amount and must be equal to this amount.
* Purchase Order BU Defaults	Required field. SWIFT opens up the PO Defaults page. Confirm the Business Unit and enter the Origin.

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Field Name	Field Description
Corporate Contract	Check this box if you want to open up the contract to other agencies.

Contract Entry

Contract

SetID: SHARE Copy From Contract Contract Version

Contract ID: NEXT Version: 1 Status: Current

*Status: Open Approval Due Date: [Calendar Icon] [New Version]

*Administrator/Buyer: [Search Icon] [Add a Document]

Header

*Contract Style: Purchase Order

Process Option: Purchase Order

*Supplier: AMERICAN E-019 Supplier Search

*Supplier ID: 0000202849 AMERICAN ENGINEERING TESTING INC

Primary Contact: [Search Icon]

Supplier Contract Ref: [Search Icon]

Description: Hazardous Hygiene Services

OSP Contract Release Nbr/T-Nbr: 1702C

*Begin Date: 03/07/2019

Expire Date: 03/08/2020

Renewal Date: [Calendar Icon]

Control Type: [Dropdown]

Tax Exempt Tax Exempt ID: [Text]

Exempt From WFC

Auto Default

Lock Chartfields

Currency: USD Rate Date: 03/07/2019 CRRNT

Must Use Contract Rate Date

Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Retention Tracking
Purchase Order BU Defaults
 Corporate Contract

Amount Summary

Maximum Amount: 23000 USD

NOTE: If you are changing the *Maximum Amount* on the header, you may get an error message. Update the *Maximum Amount* on the header to 0.00. Then, change the *Maximum Amount* on the **Release Amounts** tab on the line. Then, return to the header and update the *Maximum Amount*.

2. Review and update the line information.
 - a. On the **Details** tab, you may wish to update the *Description*.

Lines

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold

Line	Item	Description	UOM	Category	Include for Release
1	[Search Icon]	Hazardout Hygiene	EA	81141802	<input checked="" type="checkbox"/>

b. Select the **Details for Line** icon to review the *Pricing Information*.

- SWIFT displays the **Details for Line** page. Open up the **Pricing Information** section.
- Check the **Price Can be Changed on Order** box if you wish to allow buyers who create purchase orders from this contract to be able to change the price on the purchase order. It only works at the line level.

- Check the *Merchandise Amount* and *Base Price*. Change them as needed to match the *Maximum Amount* on each line.

IMPORTANT! If you don't update the *Base Price* and *Merchandise Amount* on the line, you will get the wrong amounts on any purchase orders you create against this contract.

Price Date	Due Date	Price Qty	Line Quantity	Qty Type	Current Order Quantity

Order By Amount
 Amount Only
 Merchandise Amount 2400000.00

Schedule Defaults
 Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing

	Price Loc	UOM	Base Price	Curr
<input checked="" type="checkbox"/>	001	EA	2400000.00000	USD

- Select the **OK** button at the bottom of the page to return to the **Contract Entry** page.

c. On the **Release Amounts** or **Release Quantities** tabs, you may need to update the *Fiscal Year* and the *Maximum Line Amounts*.

Line	Item	Description	Fiscal Year	Minimum Line Amount	Maximum Line Amount	Total Line Released Amount	Remaining Amount	Curr
1		Hazardout Hygiene	2019		19,000.00		\$19,000.00	USD

- When you are done reviewing and updating the record, scroll to the bottom of the page. Press the **Save** button.

Step 4: Enter information on the Create Document section

The **Create Document** section is required for all contracts. It specifies the contract type.

Office of State Procurement highly recommends electronic processing of contract documents and their signatures. You can create separate contract documents electronically through SWIFT that are part of the contract shell. These contract documents may be agency-specific, contract boilerplates, state requirements for contracts, or other documents. Depending upon the type of document you choose, the SWIFT contract configurator will walk you through the process steps to create an electronic contract that fits the transaction. You can process the entire contract document through SWIFT, including electronic signatures.

1. To access the **Create Document** page, select the **Add a Document** button on the contract header.

The screenshot shows the 'Contract Entry' page. At the top, it says 'Contract Entry' and 'Contract'. Below this, there are several fields: 'SetID' is 'SHARE', 'Contract ID' is '000000000000000000000000134228', and 'Status' is 'Open'. There is a 'Contract Version' section with 'Version' set to '1' and a 'New Version' button. The 'Status' is 'Current' and there is an 'Approval Due Date' field. At the bottom, the '*Administrator/Buyer' is 'Cunningham McComb, Shelia M' and there is a red-bordered 'Add a Document' button.

2. On the **Create Document** page, select a *Document Type*.

The screenshot shows the 'Create Document' page. It has a 'Source' of 'Purchasing Contracts'. There are links for 'Return to Document Search' and 'Return to Contract Entry'. The 'SetID' is 'SHARE' and the 'Contract ID' is '000000000000000000000000145347'. The 'Supplier' is 'AMERICAN ENGINEERING TESTING INC'. The 'Contract Style' is 'Purchase Order'. The '*Document Type' field is highlighted with a red border and has a dropdown arrow.

Document Types and Descriptions

Document Type	Description
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.
Construction Contracts	A group of different contracts for construction, remodeling and maintenance projects and services.
Grant Contracts	Contracts that are financial assistance or services furnished by the agency via a third party to an eligible recipient.
Inbound Interfaced Contracts	SWIFT does not currently use this contract document type.
Income Contracts	Contracts that bring funds into a state agency.

Document Type	Description
Professional/ Technical Contracts (P/T)	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.

- SWIFT opens up fields for the *Document Type* you selected. Enter information in the following required fields. Your agency may require other fields to be entered.

Fields on Create Document. Required fields are marked with an asterisk (*).

Field Name	Field Description
Additional Approver	Allows you to add an additional approver using the drop-down menu that lists other contract administrators.
Additional Description	Allows you to add an additional description. This field allows you to add descriptions that were not part of the header description since that field is limited. Check with your agency about its use.
* Administrator	Defaults to the Employee ID/name of the employee entering the contract. It can be updated using the drop-down menu that lists other contract administrators.
Agency Reference Field 1, 2	Optional fields for each agency to determine how to use.
Configure ID	Provides a unique identifier for the contract documents that were created using the Configure Selector (Wizard). This option is not available for Construction Contracts, Income Contracts or Real Estate Lease Contracts.
* Contract Type	The Document Type selected determines the Contract Type. P/T Contracts end in "K". Commodity Contracts end in "C".
* CPV Contract Indicator	Cooperative Purchasing Venture (CPV) allows eligible government entities (members) to use State of Minnesota contracts. There are three CPV Contract Indicators. <ul style="list-style-type: none"> • AGY: Opens up this contract to others in your agency. • CPV: Opens up this contract to all CPV members. • STW: Opens up this contract for all State agencies.
Financial Department ID	The Fin Dept ID represents an organizational function to which expenditures and other activities are identified. The Department ChartField classifies transactions according to a defined organizational structure. Combined with other ChartField values, Department IDs form the basis for department budgets that track revenues and expenditures.

Field Name	Field Description
Last Signature Date	Used for agencies that do not use SWIFT's electronic signatures. It allows you to set the last date for signatures. This is important because suppliers are not allowed to start work until the date the last signature is obtained.
References MPK Contract	Only on the Professional/Technical Contracts and Master Work Order Document Type.
Renewals Authorized	Allows you to list the number of months that renewals can be authorized.
Renewals Available	Allows you to list the number of months that renewals are available.
Retention Not to Exceed Amount	Retention is holding back full payment until the contract deliverables are completely fulfilled. Retention is required for some P/T contracts.
* Sourcing Method	<p>The method used to request or seek a bid in order to award the contract. The Office of State Procurement uses this field. The options are governed by State statute or State policy. Contact them if you have questions about which method to choose.</p> <ul style="list-style-type: none"> • Emergency: Contact OSP for the policies to use this field. • Other: None of the other options fit this contract. • RFB (Request for Bid): Typically for purchasing commodities. • RFP (Request for Proposal): Typically, for purchasing P/T services. • Single Source: There is only 1 provider of the good or service. Documentation is required.
Contract Manager	Agency person responsible for signing the contract. Important for e-Signatures.
Sponsor	Project or contract sponsor. Can be a name, position, division, agency or other sponsor.
* Statement of Purpose	The purpose or scope of the contract. This field is open to the public on the Transparency Minnesota website.

