

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### View an Ad Hoc Contract Document Created in SWIFT

An ad hoc contract document is specific to a particular need. They do not go through a formal approval process in SWIFT.

Examples of Ad Hoc documents include:

- 16A/16C Violation Memo
- A document that is specific to one contract but is not the contract itself such as special terms from the sourcing event.
- A human rights certification
- A non-disclosure agreement
- Affirmative Action Certification Form
- Single Source Request Form

This guide provides the steps on how to view an ad hoc document previously created or imported in SWIFT's Supplier Contract module.

Steps to complete

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

### Steps to view an ad hoc contract document electronically in SWIFT

#### Step 1: Access the Document Management page

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Supplier Contract, Create Contracts and Documents. Left menu links, Document Management, Add a Document page.
<b>WorkCenter</b>	Procurement, Supplier Contract, Contract/Sourcing WorkCenter. Left menu Links, Contracts section, Document Management link, Add a Document page.

1. SWIFT opens up the **Add a Document** page. Press the **Find an Existing Document** link.

The screenshot shows the 'Add a Document' form with the following fields and values:

- \*Source Transaction: Ad Hoc
- \*SetID: SHARE
- \*Ad Hoc ID: NEXT
- \*Description: (empty)
- \*Contract Style: (dropdown menu)
- \*Document Type: (dropdown menu)

Buttons at the bottom: Add a Document, Copy Document, Import Document, Find an Existing Document.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

2. SWIFT opens up the **Find an Existing Document** page. Search for the ad hoc document you wish to edit. For example, search by *Administrator* to find all ad hoc documents you created. Then select the **Search** button. Press the *Document Keys* link of the correct ad hoc document.

**Find an Existing Document**

\*Source Transaction: Ad Hoc  
Contract Style: [Dropdown]  
Document Type: [Dropdown]  
\*SetID: SHARE Ad Hoc ID: [Text Box]  
Description: Administrator Xiong,Nalee  
Sponsor: [Text Box]  
Financial Department ID: [Text Box]

All Statuses  
 Draft/Collaborated  
 Pending Approval  
 Pending Internal Collaboration/Review  
 Pending External Collaboration/Review  
 Approved  
 Dispatched  
 Pending Signatures  
 Executed/Complete

Additional Search Criteria  
**Search** Clear Save Search Criteria Keyword Search Add a Document

**Search Results**

Delete	Document Keys	Description	Origin	Document Version	Amendment	Document Status	Days In Status	Awaiting User
<input type="checkbox"/>	SHARE / ADH000000001764	Agency Violation form		0.01	0	Complete	0	

SWIFT opens up the **Document Management** page for that ad hoc contract document.

## Step 2: View the ad hoc document

1. SWIFT displays the **Document Management** page. Access the ad hoc document.
  - Scroll to the bottom of the page and select the **View Document** link.

**View and Edit Options:**

**View Document**

Edit Document

- SWIFT opens up the ad hoc document on your desktop. Select the **Open** or **Save** button.

Do you want to open or save **SHARE\_ADH000000001764\_0.00.xml** from **fms.systems.state.mn.us?** **Open** Save Cancel

SWIFT displays the ad hoc contract document for your view in either Word or PDF format depending on how you created or imported the ad hoc document in SWIFT.

**You have successfully viewed an ad hoc contract document.**