SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Updated November 1, 2019

Use the Group Contract Tool

The group contract tool allows agencies to select and create reports of group contracts to check purchase orders against the selected contracts.

The new Style ID field on the Contract Entry page allows buyers to create a contract shell that tracks the amount of encumbrances (i.e., purchase orders) of all contracts for a single supplier or a group of suppliers. It uses these options within the *Style ID* field.

- **Group Multi Supplier contracts**: You can view spend information across linked contracts for different suppliers.
- **Group Single Supplier contracts**: You can view spend information across linked contracts for the same supplier.

Once you select one of these Style ID options, you can create a single contract that keeps a current record of the total amount released for that supplier or suppliers of the contracts that you selected.

SWIFT automatically updates the encumbrance amounts on the group contract record every time your agency updates a purchase order record associated with this contract.

NOTE: You cannot create a contract shell out from the group contract tool. You can add or remove contracts from it.

This guide provides the steps to create and use the group contract tool for a single supplier contracts. It also provides the steps to create and use the tool for a multi supplier contract. The steps to create and use both single and multi supplier contracts are the same.

Steps to create and use the group supplier contract

- Step 1: Add a new contract record
- Step 2: Enter the group contract information on the contract record
- Step 3: Use the group contract report

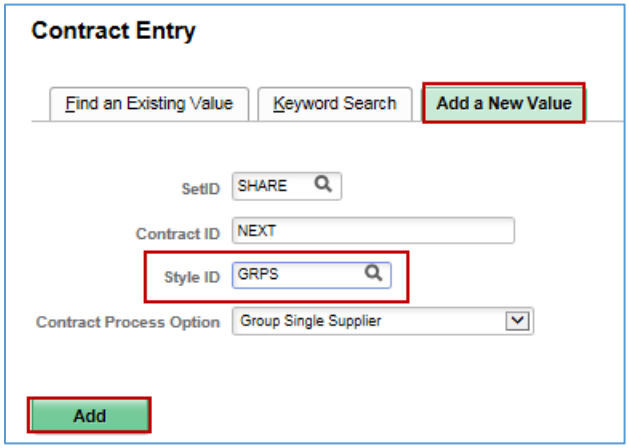
Steps to create and use the group single supplier

Step 1: Add a new contract record

1. Navigate to the **Add a New Value** tab on the **Contract Entry** page.

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

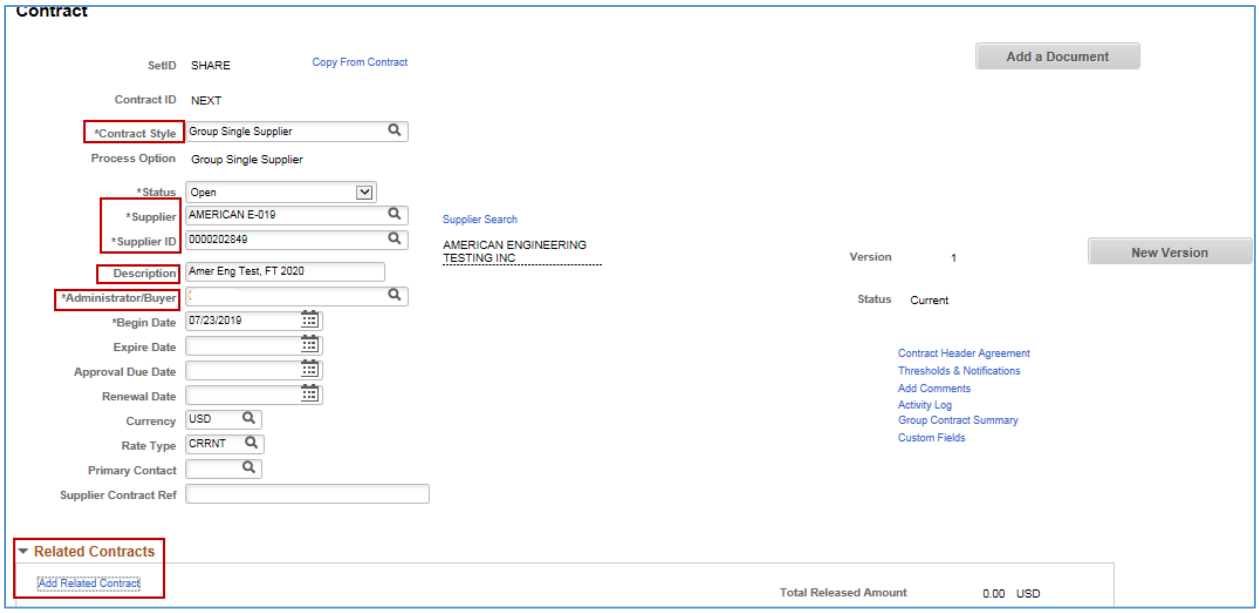
2. On the *Style ID* field, choose "GRPS". Then, select **Add**.



Step 2: Enter the group contract information on the contract record

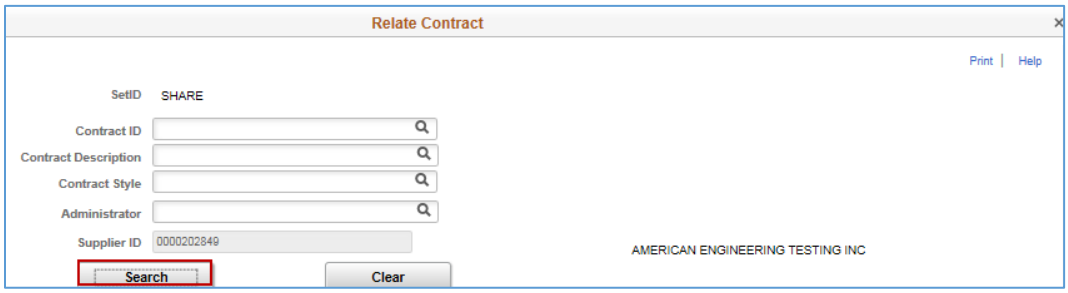
1. SWIFT opens up the **Contract** page. Enter the following information on the header.

- *Supplier:* Enter the name or *Supplier ID* for the individual supplier whose contracts you want to track.
- *Description:* Describe the group contract. You can search for it later.
- *Administrator/Buyer:* Enter your *Employee ID*.



2. Enter information on the **Related Contracts** section.
3. Press the **Add Related Contract** link.
4. SWIFT displays the **Related Contract** page.

Enter information about an individual contract you wish to track in this group contract such as *Contract ID* or *Administrator*. Or, press the **Search** button to get all contracts for that supplier.

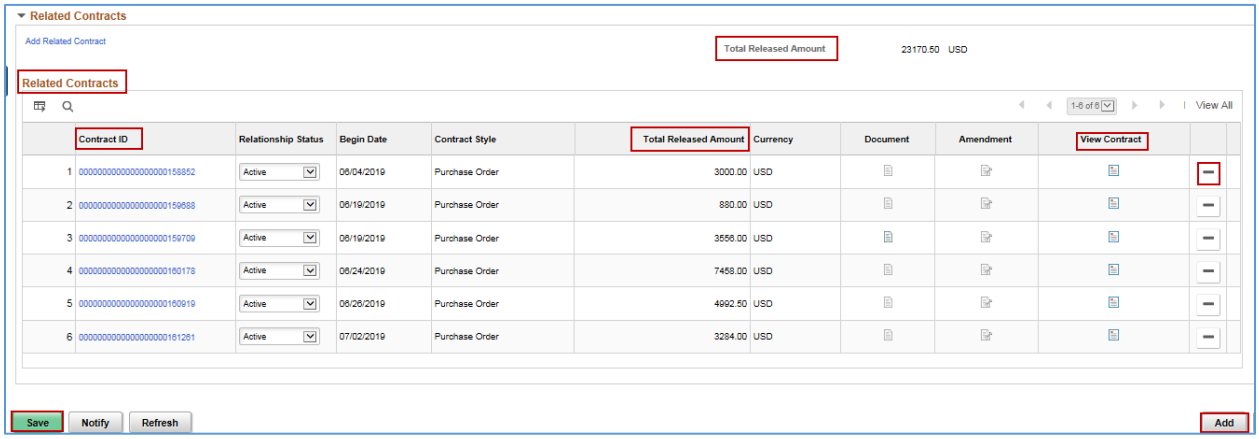


5. SWIFT displays the results.

- Check the box in the **Select** column of all of the contracts you wish to include on this group contract report.
- You can select the **View** icon to see information about an individual contract.
- At the bottom of the page, press the **OK** button.

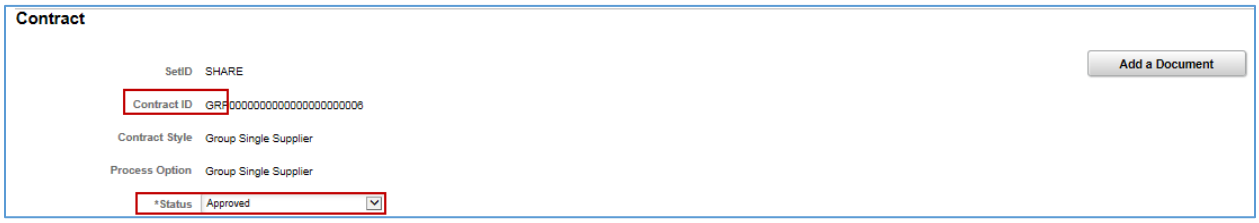
6. SWIFT returns you to the **Contract Entry** page.

- On the **Related Contracts** section, you can see the *Contract IDs* that you selected.
- At the top of this section, you can also see the *Total Released Amount*. This reflects all purchase orders for the individual contracts you selected.
- You can see the *Total Released Amount* for the individual contract. The **View Contract** icon shows you a summary of the individual contract.
- You can add or delete contracts from this report at the time you create it and after you save it.



- On the bottom of the page, press the **Save** button.

7. SWIFT updates the *Contract ID* field with an ID that begins with "GRP".

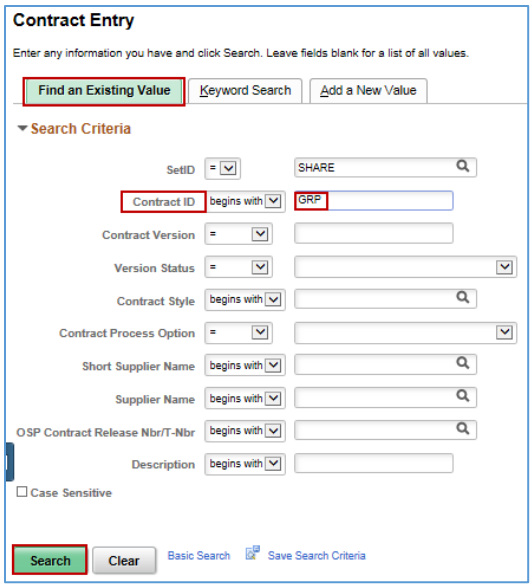


Step 3: Use the group contract record

1. Navigate to the **Find an Existing Value** tab on the **Contract Entry** page.

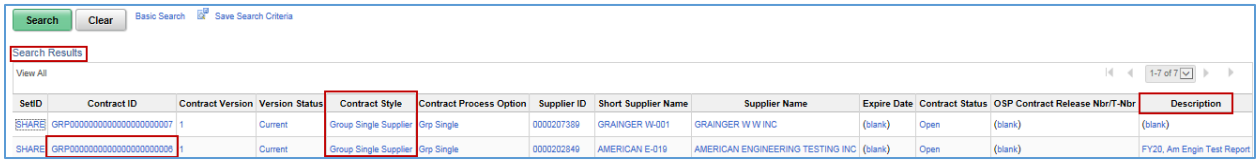
Navigation Options	Navigation Path
Navigation Collection	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page, Find an Existing Value tab.
WorkCenter	Procurement, Supplier Contract, Contract/Sourcing WorkCenter. Left menu, Contracts section, Add/Update Contracts, Contract Entry page, Find an Existing Value tab.

- Enter the *Contract ID* you wish to view and press **Search**. All group contracts have a *Contract ID* that begins with "GRP".



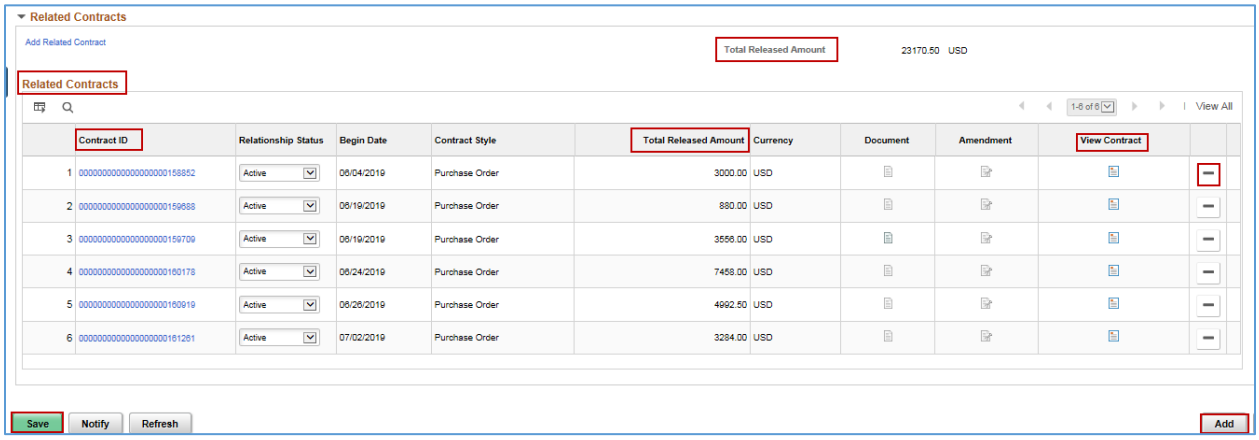
Depending upon the values you entered into the search, SWIFT brings you directly to the contract record or updates the page to add **Search Results**.

- If you are on the **Search Results** section, select the *Contract ID* link on the group contract you wish to review.



2. Review the record as needed.

SWIFT opens up the **Contract Entry** page. On the **Related Contracts** section, you can see the *Total Released Amount* for all for all of the contracts on the record. You can also look at the *Total Release Amount* for individual contracts on the record.



3. Edit the record as needed.

- You can add or delete contracts from this report at the time you create it and after you save it. You can update many of the fields on the header of this record.
- If you wish to edit the record, update the *Status* field to "Open". Make your edits.
- When you are done, return the *Status* back to "Approved" and save it.

You have successfully created and used the group single supplier contract.

Overview on how to create a multi supplier contract

Step 1: Add a new contract record

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Navigation Options	Navigation Path
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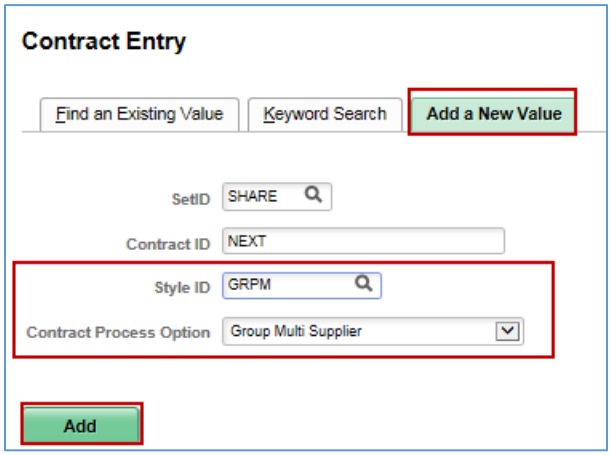
2. On the *Style ID* field, choose "GRPM". Then, select **Add**.

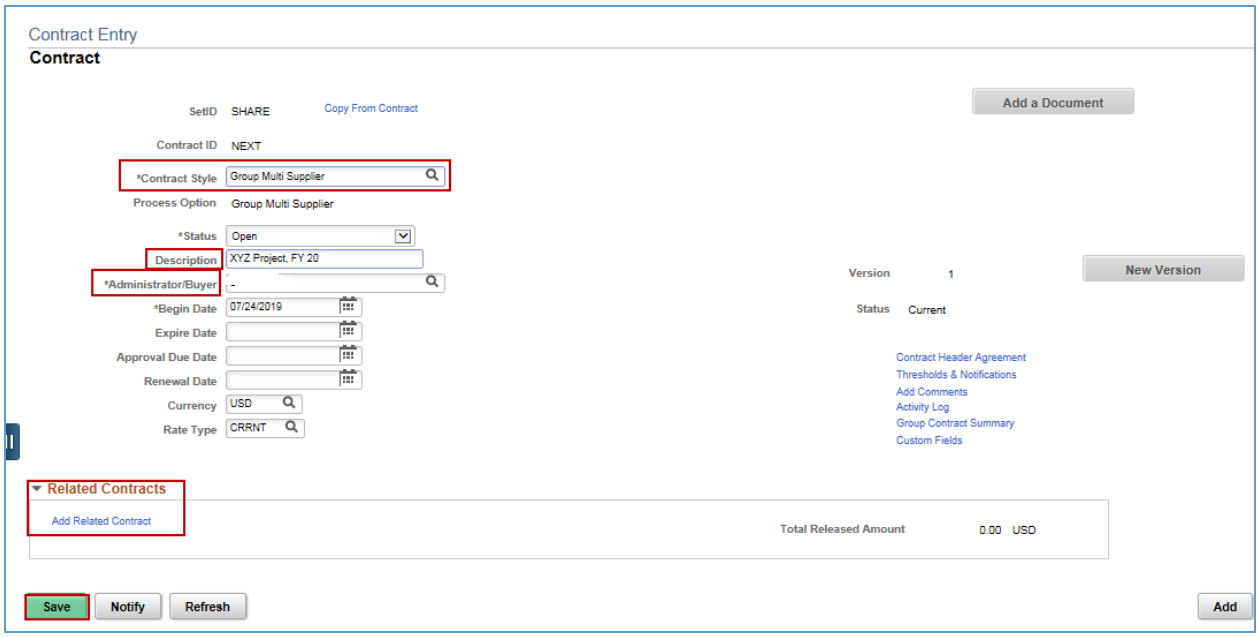


Step 2: Enter the group contract information on the contract record

1. SWIFT opens up the **Contract** page. Enter the following information on the header.

- *Description:* Describe the group contract. You can search for it later.
- *Administrator/Buyer:* Enter your *Employee ID*.

NOTE: There is no Supplier field on the header of a group contract record.



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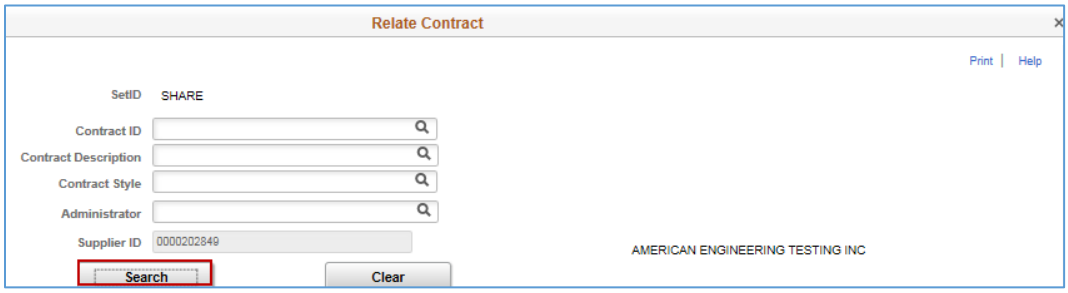

- SWIFT displays the results.

3. Check the box in the **Select** column of all of the contracts you wish to include on this group contract report.

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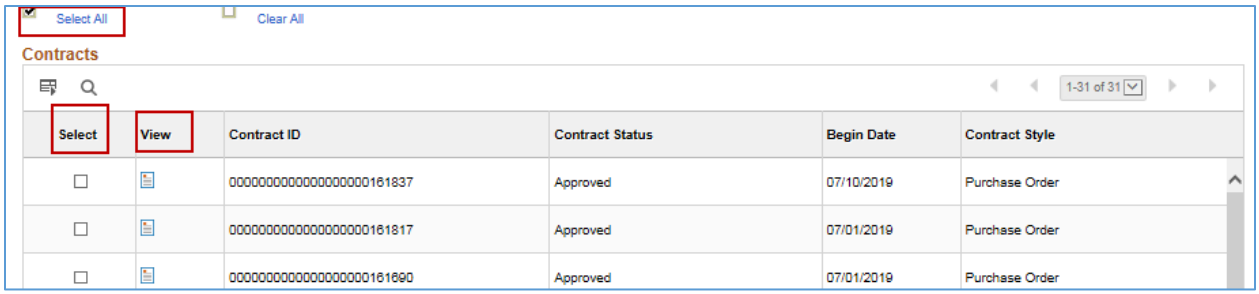

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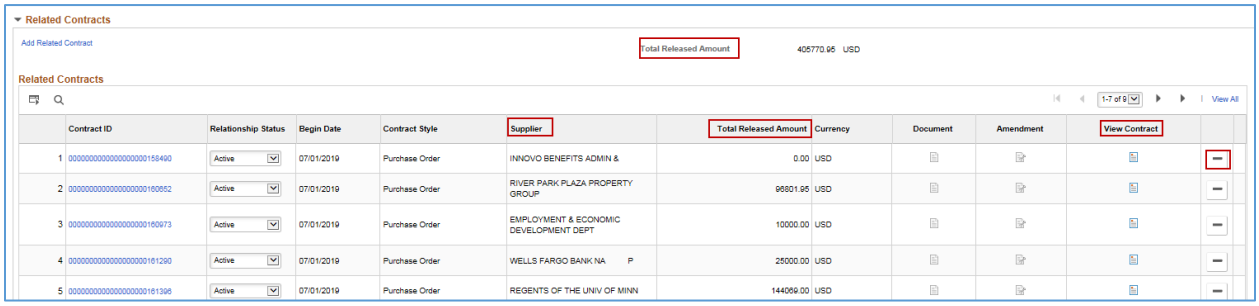

- On the bottom of the page, press the **Save** button.
- SWIFT updates the *Contract ID* field with an ID that begins with "GRP".

Step 3: Use the group contract record

The steps to use the group multi supplier contract are the same as the group single contract.

1. Navigate to the **Find an Existing Value** tab on the **Contract Entry** page.

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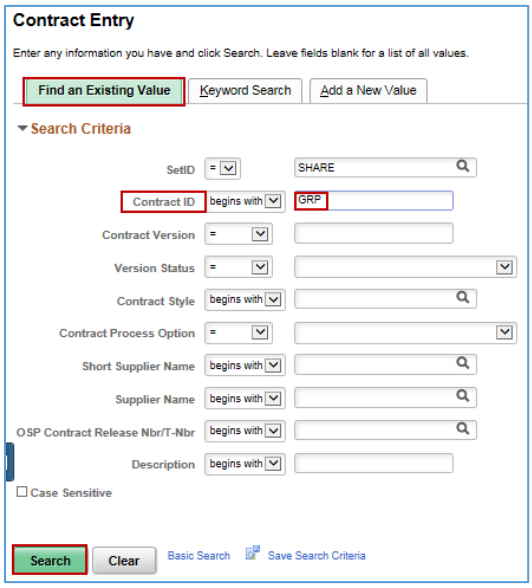

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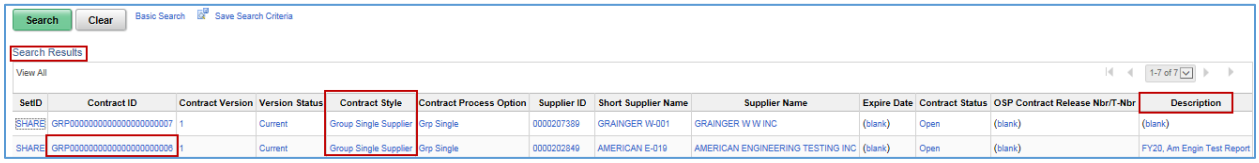

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