SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

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Roles for Electronic Processing of Contract Documents

This guide provides the list of required roles and a description of those roles for electronic processing of contract documents through SWIFT.

A major enhancement in SWIFT Supplier Contract module is electronic contract document processing. Agencies can process the entire contract document process electronically. This feature allows agencies to reduce or eliminate the need for manual routing and storing of paper contract documents.

- SWIFT serves as a repository of the contract documents. It also allows agencies to electronically collaborate, approve and get signatures. You can amend a contract document and reroute it through electronic processing.
- To use the advanced features in the Supplier Contracts module, your agency will need to coordinate access to the roles depending upon the need for each SWIFT user. Check with your agency security administrator.

Request and set up a DocuSign account.
In order to send contract documents electronically through SWIFT, you will first need to request and activate a DocuSign account.

1. Your agency leadership needs to complete and sign the *Request for Access to SWIFT Statewide Systems* security form. On the *Supplier Contracts* section of that form, check the **YES – SWIFT DocuSign Account Needed** box.
2. MN.IT's security will review this request. Once approved, the SWIFT Procurement team will send you an email notification to activate your account.
3. You will also receive an additional email from DocuSign with your Access Code.

For more information about SWIFT security, please visit the SWIFT Security web page.
https://mn.gov/mmb/accounting/swift/security/

Roles include approving contract documents, sending contract documents for collaboration (peer review), responding to collaboration invitations, creating electronic contract documents, verifying encumbrances, and sending contract documents for signatures via DocSign.

Supplier Contract Role Name	Role Description
Approver: **Document Approver** **M_FS_SC_CONTRACTUAL_APPRVER**	Users with this role are responsible for reviewing and providing feedback on documents that are going through the SWIFT approval process for professional/technical contracts. This would include anyone who could potentially be selected as a "Contract Manager" or "Additional Approver" for the P/T Workflow.
Collaborator: **Document Collaborator** **M_FS_SC_DOC_COLLABORATOR**	Users with this role are able to collaborate on both ad hoc (i.e., RFPs and forms) and transactional contract documents. Users with this role may review, edit and comment on documents before they have been executed.
Document Creator: **SC Administrator** **M_FS_SC_DOC_ADMIN**	This role should be given to users responsible for creating, amending, and managing ad hoc documents. Users with this role have access to: • create and maintain contract documents • define contract components (clauses, sections) • maintain document configurator • execute the document wizard • search for contracts and documents using full text and attributes • maintain MMD contract release number prompt table Users with this role can run queries using Supplier Contract data.
Document Creator: **SC Compliance Manager** **M_FS_SC_AGREEMENT_MGR**	This role should be given to users responsible for creating, monitoring, and updating compliance with agreements. Users with this role have access to: • create contract agreements and process batch workflow notifications • monitor and update agreement details • monitor and update agreement compliance • review agreement status • update contract agreement activities and statuses Users with this role can run queries using Supplier Contract data.

Supplier Contract Role Name	Role Description
Document Creator: **Contract Administrator** **M_FS_SC_CONTRACT_ADMIN SC**	This role should be given to users responsible for the day-to-day management of contracts and documents. Users can create and amend contracts, documents, and agreements. Users with this role have access to: • create contracts • amend existing contracts- header, line, release info • view contract document status • view contract change history • search for contracts by full text and attributes • create and maintain contract documents • amend existing contract documents • execute the document wizard • define contract document components (clauses, sections) • use the document configurator • create contract agreements and process batch workflow notifications • search for contracts and documents using full text and attributes • maintain MMD contract release number prompt table Users with this role have Inquiry/Display only access to: • AP/Voucher information • PO information • receipt information • EPro information • preview Asset Management AP/PO send information • Purchasing information • review sourcing event details and history • additional supplier contract pages Users with this role can run reports: • purchasing reports • receiving reports • requisition reports • EPro reports • sourcing reports Users with this role can run queries using Supplier Contract data.

Supplier Contract Role Name	Role Description
Document Creator: **PO-Order Contract Encumbrance** **M_FS_PO_CONTRACT_ENCUMB**	Users assigned this role are responsible for creating encumbering documents from an approved contract. Users can create purchase orders for other buyers, but cannot be listed as the buyer on the PO. Users can update purchase orders. Users with this role cannot enter receipts against purchase orders. Users with this role have access to: Procurement • create, analyze, dispatch internally, unapprove, cancel, close, preview POs Note: cannot create a PO and be listed as the buyer • process change orders • review POs and determine if outstanding PO lines should be set to close short • reopen POs • print POs via the PO Dispatch/Print report • view and modify PO data in staging tables, and update sourcing selections Requisitions • analyze, approve, unapprove, cancel, close, preview, Budget Check and print requisitions • assign vendors to requisitions • source requisitions from inventory • create purchase orders from requisitions • load approved requisitions to staging tables • review requisitions, edit or view status, and cancel Users with this role have Inquiry/Display only access to: • EProcurement pages • Purchasing pages • review match status and match exceptions Users with this role can run EPro and purchasing reports, and can run queries using purchasing data