

## QUICK REFERENCE GUIDE

Updated June 18, 2020

# Route an Ad Hoc Contract Document for Electronic Signatures

SWIFT's Supplier Contracts module allows agencies to create and electronically sign ad hoc contract documents. After you create an ad hoc contract document electronically using SWIFT, you can route it electronically for signatures.

SWIFT uses a limited version of DocuSign for contract document signatures.

This guide provides an overview of using SWIFT for electronic signatures with DocuSign. It lists the steps on how to route an ad hoc contract document for electronic signatures using DocuSign. There is a separate guide for creating and processing ad hoc contract documents through SWIFT.

Steps to complete

- Step 1: Access the ad hoc contract document
- Step 2: Prepare and route the ad hoc contract document for electronic signatures
- Step 3: Complete the document

## Overview of Using SWIFT for Electronic Signatures with DocuSign

**SWIFT uses DocuSign for contract document signatures.**

- Requests for reviewing and signing contract documents go from SWIFT to DocuSign to the signer's email address.
- Contract signers do not need to log into SWIFT. They can easily review and sign ad hoc contract documents through their email and DocuSign.
- The contract coordinator needs to activate a DocuSign account before routing any contract documents for electronic signatures.
- **IMPORTANT!** Make sure that your agency knows the correct email addresses for all the signers before routing this document through DocuSign.

**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.

## Ensure correct SWIFT Security Role.

Since SWIFT uses DocuSign, contract signers do not need SWIFT security roles for electronic signatures.

However, as the contract coordinator routing a contract document for electronic signatures, make sure that you have the correct role for routing contract document electronically. Typically, you will need one of these roles.

<b>SC Administrator</b> <b>M_FS_SC_DOC_ADMIN</b>	This role should be given to users responsible for creating, amending, and managing ad hoc documents.
<b>Contract Administrator</b> <b>M_FS_SC_CONTRACT_ADMIN SC</b>	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.

## Set up electronic signatures when creating the ad hoc document in SWIFT.

During the Configurator Selector part of creating an ad hoc contract document through SWIFT, the buyer must select the electronic signature process before saving and processing the contract document. Otherwise, SWIFT will not be able to route it for electronic signatures. If you forget this step, you will need to create a new ad hoc contract document.

## Routing the ad hoc document to the Office of State Procurement.

When adding the Office of State Procurement for signatures, use this email: [OSPHelp.Line@state.mn.us](mailto:OSPHelp.Line@state.mn.us).

## Check the Status of the ad hoc contract document.

The ad hoc contract document must be in a "Draft" Status. If you completed the document in SWIFT before routing it for electronic signatures, you will have to press the Edit Document button and restart the workflow process again.

## Steps to route an ad hoc contract document for electronic signatures using DocuSign

### 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 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)

At the bottom of the form, there are four buttons: 'Add a Document', 'Copy Document', 'Import Document', and 'Find an Existing Document'. The 'Find an Existing Document' button is highlighted with a red box.

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2. SWIFT opens 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, press the **Search** button.

SWIFT opens the *Search Results* section.

- Make sure that its *Status* is “Draft.”
- 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: [Input]  
Description: [Input]  
Administrator Hussein, Hussein M  
Sponsor: [Input]  
Financial Department ID: [Input]

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

► 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
<input type="checkbox"/>	SHARE / ADH000000001766	Agency Violation Memo		0.03	0	Draft

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

## Step 2: Prepare and route the ad hoc contract document for electronic signatures

1. On the bottom of the *Document Management* page, go to the *Other Document Actions* section. Press the **Prepare and Route for e-Signature** button. The appearance of this button depends upon the *Status*. It must be “Draft.”

**View and Edit Options:**  
View Document  
Edit Document  
Add Attachments/Related Documents  
Document Modification Summary  
Document Version History

**Review and Approval:**  
Route Internally  
Internal Contacts/Signers  
Document View Access

**Other Document Actions:**  
Send to Contacts  
Refresh Document  
Recreate Document  
Compare Documents  
**Prepare and Route for e-Signature**  
Deactivate Document

2. SWIFT opens the *Send Document for Signing* page. Complete it as follows.

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- “Sign Based on Sign Order”: keep the “Sign Based on Sign Order” default. Otherwise, all your signers will get the email at the same time.
- Use the defaulted *Email Address* tab to enter the following information for each signer.
  - Email – You will enter these manually.
  - User – Enter the Employee ID of the signer. You can look it up on the search icon.
  - Recipient Name – SWIFT populates this field after entering Employee ID.
  - Sign Order – Enter the number of the order in which each signer receives the email invitation.
- On the *Subject* area, update it as needed. It will appear in the email’s Subject Line.
- On the *Message* area, enter a message that will appear in their email.

Send Document for Signing

SetID SHARE Ad Hoc ID ADH000000001767

Signing Order Sign based on Sign Order

Send To Recipients

*Email	User	Recipient Name	Carbon Copy	Sign Order	External Signer
:@state.mn.us	?		<input type="checkbox"/>	1	<input type="checkbox"/>

Subject AGENCY VIOLATION MEMO

Message This is the default email message - Update/Edit as needed.

Send Cancel

- Select the **Add a New Row** icon (plus sign) to add a row for each signer. Complete the information for each signer.
- Select the **Send** button when you are completely done adding each signer.

SWIFT returns you to that ad hoc document’s *Document Management* page.

3. Monitor the status of the signatures on the *Signing Details* section. Select the **Expand Section** icon to open this area.

Signing Details

Signature Status Pending Signatures Get e-Signature Status

10/09/2018 03:07 PM Created - The envelope was created by Contract Coordinator Name  
 10/09/2018 03:07 PM Sent - sent an invitation to Contract Coordinator Name Contract Signer 1

Signers

	Email	User Name	Sign Status	Signed DTTM
1	Contract Signer Email	Contract Signer Name	Pending Signature	

When each signer completes their signature, this *Sign Status* will be “Signed” for that line.

Signers				
	Email	User Name	Sign Status	Signed DTTM
1			Signed	10/09/2018 3:25PM

When all signers complete their signatures, the *Signature Status* will update from “Pending Signatures” to “Signed.”

▼ **Signing Details**

Signature Status Signed

### Step 3: Complete the document

When all signers have completed their reviews and the *Signature Sign Status* is “Signed,” you are ready to complete the document. Press the **Complete Document** button.

Version 0.00      Created On 10/11/18 10:55AM      [Document Details](#)  
 Status Draft      Last Modified On 10/11/18 12:09PM

**Complete Document**

▼ **Signing Details**

Signature Status Signed      **Get e-Signature Status**

SWIFT updates the *Status* to “Complete.” This ad hoc contract document is ready for use.

Version 0.01      Created On 09/23/19 1:49PM      [Document Details](#)  
 Status Complete      Last Modified On 09/23/19 1:50PM  
 Completed On 09/23/19 1:50:08PM

**View and Edit Options:**      **Review and Approval:**      **Other Document Actions:**

**View Document**      [Internal Contacts/Signers](#)      **Send to Contacts**  
 Edit Document      [Document View Access](#)      Refresh Document

- You can select the **Send to Contacts** button to show the signers that the signatures are complete.
- You can select the **View Document** button to see the document at any time.
- You can also now electronically attach it to contract documents created and processed electronically through SWIFT.

**You have successfully routed an ad hoc contract document for electronic signatures using DocuSign.**