

# Understand Document Configurators in SWIFT's Supplier Contract Module

You can create and process a contract document electronically in SWIFT's Supplier Contracts module using document configurators. Based on the document type you select, SWIFT uses document configurators or wizards to set up the correct contract document template. In some cases, you will need to respond to a series of questions to guide SWIFT in selecting the appropriate configurator.

This quick reference guide provides the steps to create a contract document in SWIFT using document configurators. It demonstrates the creation of a Professional/Technical contract document. To submit the contract document for approvals and electronic signatures, review these steps in the [Import a Contract Document Created outside of SWIFT and Route for Electronic Signatures](#) Quick Reference Guide.

**VERY IMPORTANT! You are responsible to make sure you use the most current version of a contract document form. Follow your agency's forms and policies.** The most recent version may not be in SWIFT contract document configurators. Consider importing a contract document created outside of SWIFT.

If you are using contract templates from the Office of State Procurement (OSP) or the Office of Grants Management (OGM), make sure you are using the most recent version.

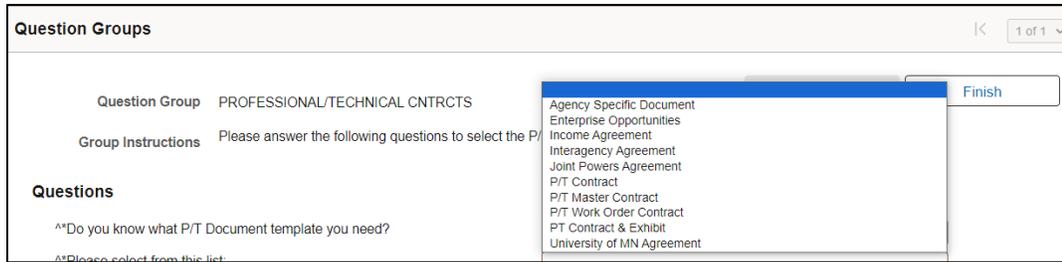
- [Office of Grants Management: Forms and FAQs](#)
- [Office of State Procurement: Professional and Technical Services Forms](#)

## Document Configurators in SWIFT

**NOTE:** There are no document configurators for Acquisitions contract documents in SWIFT.

### Professional/ Technical Contracts (P/T) Configurators

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.



## Grant Configurators

Grant contracts that are financial assistance or services furnished by the agency via a third party to an eligible recipient.



## Steps to Create a Contract Document using Configurators

### Step 1: Create a new contract shell

If you have questions about creating a contract shell, review the [Create a Supplier Contract Shell](#) Quick Reference Guide.

1. Navigate to the **Create Document** page on a new contract shell.

Navigation Option	Navigation Path
<b>Navigation Collection</b>	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry, the Add a New Value tab defaults.

2. On the Add a New Value tab, select the **Add** button.
3. SWIFT displays the Contract Entry page.
  - a. Enter the required information to create the contract shell.
  - b. At the bottom of the page, select the **Save** button. SWIFT will create a Contract ID for the contract shell.
  - c. Keep the **Status** to “Open.”
  - d. On the right side of the header of the Contract Entry page, select the **Add a Document** button.

**Contract**

SetID SHARE

**Contract Version**

Version 1 Status Current

Contract ID 0000000000000000000245384

\*Status Open

Approval Due Date

\*Administrator/Buyer TRN01 Training User TRN01

New Version

Add a Document

## Step 2: Use the Configurator Selector to create a contract document

1. SWIFT displays the Create Document page.
  - a. Select the correct **Document Type**. In this example, we'll select "Professional/Technical Contracts."
  - b. Enter the required information in the Create Document page.
  - c. When you have populated this page, **save** it again.
2. At the top of the page, select the **Configurator Selector** button.

**Create Document**

Source Purchasing Contracts

SetID SHARE

Supplier OLEB MEDIA LLC

Contract Style Purchase Order

\*Document Type Professional/Technical Cntrcts

Configurator ID

Configurator Selector

3. SWIFT opens up the Configurator Selection Wizard. Answer the questions. Then, press **Finish**.

Question Group PROFESSIONAL/TECHNICAL CNTRCTS

Group Instructions Please answer the following questions to select the P/T document you need.

**Questions**

\*\*Do you know what P/T Document template you need? Yes

\*\*Please select from this list: P/T Contract

Previous Finish

4. SWIFT returns to the Create Document page.
  - a. At the bottom of the page, select **Save**.
  - b. Then select the **Create Document** button.

Use Wizard Responses from Document: ( Select Document)

Create Document

Save

Import Document

Internal Contacts/Signers

External Contacts/Signers

Document View Access

- SWIFT opens up the Wizard Execute – Document Creation page about collecting signatures electronically. Answer the question and press **Finish**.

Question Group SIGNATURES

Group Instructions Please answer the following question:

Questions

Are you collecting signatures electronically? Yes

Previous Finish

## Step 3: Complete the contract document

- SWIFT displays the Document Management page. Press the **Edit Document** button.

View and Edit Options:

View Document

Edit Document

Add Attachments/Related Documents

Document Modification Summary

Document Version History

Review and Approval:

Route Internally

Route Externally

Preview Approval

Submit for Approval

Other Document Actions:

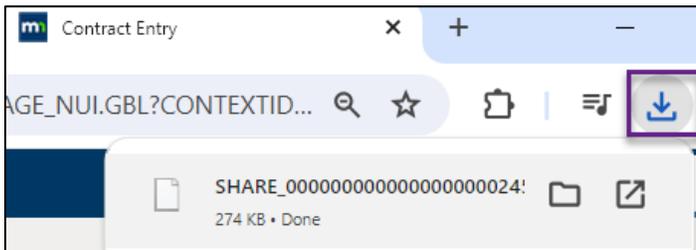
Send to Contacts

Refresh Document

Recreate Document

Compare Documents

- SWIFT creates a Word contract template for this Contract ID on the desktop. Download it. SWIFT considers this as checking out the contract document.



- Update the Word document and process it as needed.
  - When you are done, save it to your desktop. **IMPORTANT.** Do not change the name of it.
  - In the Document Management page for the contract shell, you can see the Status of the contract document is “Draft.” You can also see who checked it out. Select the **Check In** button.

Version 0.00

Created On 05/20/24 9:47AM

Status Draft

Last Modified On 05/20/24 9:59AM

Checked Out On 05/20/24 9:59AM

Checked Out By TRN01

Document Details

View and Edit Options:

View Document

Check In

Cancel Check Out

Review and Approval:

Internal Contacts/Signers

External Contacts/Signers

Document View Access

Other Document Actions:

Generation Log



Version 0.01	Created On 05/20/24 9:47AM	Document Details
Status <b>Draft</b>	Last Modified On 05/20/24 10:28AM	
<b>View and Edit Options:</b> <input type="button" value="View Document"/> <input type="button" value="Edit Document"/> <a href="#">Add Attachments/Related Documents</a> <a href="#">Document Modification Summary</a> <a href="#">Document Version History</a>	<b>Review and Approval:</b> <input type="button" value="Route Internally"/> <input type="button" value="Route Externally"/> <input type="button" value="Preview Approval"/> <input type="button" value="Submit for Approval"/>	<b>Other Document Actions:</b> <input type="button" value="Send to Contacts"/> <input type="button" value="Refresh Document"/> <input type="button" value="Recreate Document"/> <input type="button" value="Compare Documents"/>

- b. After approvals, you'll need to dispatch and then execute the contract document.
- c. On the Contract Entry, you can see the **Authored Document** as "Executed." When you're ready, change the Status to **Approved**.

<b>Contract</b>		<b>Contract Version</b>	
SetID	SHARE	Version	1
Contract ID	0000000000000000000000000245384	Approval Due Date	
*Status	Approved		
Administrator/Buyer	TRN01	Training User TRN01	
<input checked="" type="checkbox"/> <b>Authored Document</b> Authored Status Executed			