QUICK REFERENCE GUIDE

May 29, 2024

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 contact document for approvals and electronic signatures, review these steps in the <u>Import a Contract</u> <u>Document Created outside of SWIFT and Route for Electronic Signatures</u> 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.

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Question Groups			<
Question Group	PROFESSIONAL/TECHNICAL CNTRCTS	Agency Specific Document	Finish
Group Instructions	Please answer the following questions to select the P/	Enterprise Opportunities Income Agreement Interagency Agreement	
Questions		Joint Powers Agreement P/T Contract P/T Master Contract P/T Work Order Contract	
^*Do you know what P/T [Document template you need?	PT Contract & Exhibit University of MN Agreement	

Grant Configurators

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

Question Group GRANT DOCUMENT SELECTION	Previous	Finish
Questions		
^*Which document do you need?	Office of Grants Management templates	~
^*Please select your template from this list.		~
"Sourcing Method Other Q Statement of Purpose	Competitive Grant Contract Agreement for Nongovernmental Org Grant Contract Agreement for Individuals Grant Contract Agreement for Nongovernmental Organization SS Legislatively-named Grant Contract Agreement for Municipalit Legislatively-named Grant Contract Agreement for Nongov Orga Municipal Grant Contract Agreement University of MN Grant Contract Agreement	Finish

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 <u>Create a Supplier Contract Shell</u> Quick Reference Guide.

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

Navigation Option Navigation Path	
Navigation Collection	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.

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Contract					
SetID	SHARE	Contract Version			
Contract ID	00000000000000000245384	Version	1	Status	Current New Version
*Status	Open 🗸	Approval Due Date	<u>=</u>		
*Administrator/Buyer	TRN01 Q	User TRN01			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		Previous	Finish
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 I	ist:	P/T Contract		~

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



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



Step 3: Complete the contract document

1. SWIFT displays the Document Management page. Press the Edit Document button.

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Route Internally	Send to Contacts
Edit Document	Route Externally	Refresh Document
Add Attachments/Related Documents Document Modification Summary	Preview Approval	Recreate Document
Document Version History	Submit for Approval	Compare Documents

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



- 3. Update the Word document and process it as needed.
 - a. When you are done, save it to your desktop. IMPORTANT. Do not change the name of it.
 - b. 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 Status Draft	Created On 05/20/24 9:47AM 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	Review and Approval: Internal Contacts/Signers	Other Document Actions: Generation Log
Check In	External Contacts/Signers Document View Access	
Cancel Check Out		



- 4. SWIFT displays the Check In Document page.
 - a. Select a Version, depending on your agency's policies.
 - b. Add **comments** as needed.
 - c. Select OK.

Check In Documer	nt		
Select the desired versi be prompted to enter the	ioning option and enter a brief description describing the ie filename.	e changes. Seleo	ct the OK button to proceed and you will then
SetID	SHARE	Contract ID	0000000000000000245384
Supplier	OLEB MEDIA LLC		
Versi	on ● Minor Version (0.01) ○ Major Version (1.00)		
*Commen	Check In:		de.
	245 characters remaining		
ОК	Cancel		

5. SWIFT opens the Check In Document window. Select the **Choose a File** button.

Check In Document	\times
Choose File No file chosen	
Upload Cancel	

6. SWIFT opens your desktop. Select the contract document and press **Open**.

File name: SHARE_000000000000000000000000000000000000	~	All Files	~
		Open	Cancel

7. SWIFT updates the Check In Document window with the contract document. Select Upload.

Check In Document $\qquad imes$		
Choose File]SHARE_00000045384_0.00.xml	
Upload	Cancel	

- 8. SWIFT displays the updated Document Management page. Continue to process this contract document according to the SWIFT reference guides and your agency's policies.
 - a. For example, you will likely need to submit it for Approvals.

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Version 0.01	Created On 05/20/24 9:47A	M Document Details
Status Draft	Last Modified On 05/20/24 10:28A	λM
View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Route Internally	Send to Contacts
Edit Document	Route Externally	Refresh Document
Add Attachments/Related Documents Document Modification Summary	Preview Approval	Recreate Document
Document Version History	Submit for Approval	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**.

Contract		
SetID	SHARE	Contract Version Version 1
Contract ID	00000000000000000245384	
*Status	Approved	Approval Due Date
Administrator/Buyer	TRN01	Training User TRN01
✓ Authored Document Authored Status	Executed	