

QUICK REFERENCE GUIDE

Updated August 17, 2020

Create an Electronic Amendment of a Contract Document Created Outside of SWIFT

Agencies use SWIFT's Supplier Contract module to create a contract shell for a contract. This shell has a SWIFT ID and details about the contract. The agency created and processed the official contract document outside of SWIFT using wet signatures.

There are times when you need create a system-generated electronic amendment to a contract document created outside of SWIFT.

- Create a system-generated electronic amendment when your agency is transitioning from paper to electronic contract management.
- Use SWIFT's document configurator to create an electronic contract amendment.
- You can also route this system-generated contract amendment through collaboration, approvals and signatures through SWIFT.
- Electronic routing through SWIFT allows agencies to reduce or eliminate the need for manual routing and storing of paper contract documents.

Currently, there are 14 electronic amendment templates that agencies can use.

- All agencies can use the P/T Contract Amendment, P/T Work Order Amendment and the Office of Grant Management Amendment templates
- The Minnesota Departments of Administration and Health have approved amendment templates within SWIFT.
- If an agency wishes to add a template, contact the Office of State Procurement.

The Office of State Procurement (OSP) and the Office of Grants Management (OGM) approved these amendment templates. They may update them in SWIFT. Contact these offices if you have questions about these amendment documents.

This guide provides the steps to create a system-generated, electronic amendment to a contract document created outside of SWIFT

Steps to complete

- Step 1: Access the Document Management page
- Step 2: Download a scanned version of the executed contract document
- Step 3: Create an electronic amendment

Steps to create an electronic amendment to a contract document created outside of SWIFT

Step 1: Access the Document Management page

Navigation Options	Navigation Path
Navigation Collection	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.

1. On the *Contract Entry* page, select the *Find an Existing Value* tab. Enter the *Contract ID*, then press the **Search** button.
2. In the *Search Results* section, press the link of the *Contract ID*.

Search Results						
View All						
SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID
SHARE	000000000000000000145361	1	Current	Purchase Order	Order	0000216180

3. SWIFT displays the *Contract Entry* page for that contract. In order to amend the contract document, the *Status* must be "Open." Select the **Maintain Document** button on the right side of the page.

Contract

SetID SHARE
Contract ID 000000000000000000000000145347

*Status Open

*Administrator/Buyer

Contract Version

Version 1

New Version

Status Current

Approved Date 09/21/2018

▼ Authored Document

Authored Status Executed

Document Version 0.01 Amendment 0

Maintain Document

SWIFT opens the *Document Management* page.

Step 2: Download a scanned version of the executed contract document

If you did not already upload a scanned copy of the executed copy, you will need to do this now. If you already uploaded a scanned copy of the executed contract document, skip Step 2.

SWIFT opens the *Create Document* page.

1. On the bottom of the page, select the **Import Document** button.

☐ Use Wizard Responses from Document: (Select Document)

Create Document

Import Document

Save

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

SWIFT opens the *Import Options* section on the bottom of the page.

2. On the *Import Option* field, select an option that describes the document that you are downloading (e.g., current contract, amended contract, amended contract and amendment or original and amendment).

Import Option



☒ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

☐ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)

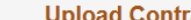
☐ **Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file. History is optional.)

☐ **Original and Amendment**
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

3. In the *Current Version* section, enter information about the contract document and press the **Upload** button.
 - Enter the *Version*.
 - Use a *Status* of “Executed” when the contract is completely executed outside of SWIFT.
 - Enter the *Status Date* of the contract document.

Type	File Name	Version	Status	Status Date	Status Time	Upload
Contract Document		1	Execute 	09/28/2018 		Upload

4. The *Upload Contract Document* message appears. Select **Browse**.



5. SWIFT displays your desktop. Enter the file and open it.

File name: SHARE_00000000000000000000145345_0.00.xml All Files (*.*)

Open Cancel

6. SWIFT displays the updated *Upload Contract Document* message. Select **Upload**.

[illegible]

7. SWIFT updates the *Current Version* section to reflect the document that you uploaded. When you are done, press the **Done with Import** button.

[illegible]

8. SWIFT displays a message. Select **Yes** if you do not want to make changes to the imported document.

Are you sure you are done with import? (10420,576)

If you choose Yes, system will save the imported files. You may no longer change them. If you choose No, you may go back to reload a previously imported file.

SWIFT returns to the *Document Management* page.

Step 3: Create a system-generated, electronic amendment of the imported document

1. On the *Document Management* page, go to the bottom of the page and press the **Create Amendment** button.

Version	1.00	Created On	09/28/18 12:00AM	Document Details
Status	Executed	Last Modified On	09/28/18 8:53AM	
Reset to Dispatch		Executed On	09/28/18 12:00:00AM	
Create Amendment				

2. SWIFT displays the *Create an Amended Version* page. Update it.
 - Enter the *Amended Option*. Always select “Amendment Files Only.”
 - Select the *Amendment Configurator ID*. As with the initial document, SWIFT provides different configurators to help create the document template for your amendment. Use the **Lookup** icon to see the valid options.

The Office of State Procurement (OSP) and the Office of Grants Management (OGM) approved these amendment templates. They may update them in SWIFT. Contact these offices if you have questions about these amendment documents.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Configurator ID	Configurator Type	Description
OGM_GRANT AMENDMENT	STD	OGM GRANT AMENDMENT
P/T CONTRACT AMEND	STD	MMD P/T Contract Amendment
P/T WORK ORDER AMEND	STD	MMD P/T Master Contract Work Order Amendment
RECS WO AMEND	STD	RECS WO AMEND END DT ONLY
RECS WO AMENDMENT	STD	RECS Consult Supp Agreement/Contract Amend for BSA
RECS_SA	STD	RECS SA
RECS_SA_END_DATEONLY	STD	RECS_SA_END_DATEON_Only

- Indicate whether the amendment represents minor or major version change to the original document.
 - SWIFT defaults to *Minor Version*. Follow your agency's guidance on tracking contract document versions.
- Enter a comment explaining why the amendment is necessary.
- Press **OK** to process the amendment.

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option

Amendment Files Only

Amendment Configurator ID

MMD_ACQ_AMND_WET

Version

☐ Minor Version (1.01)
 ☒ Major Version (2.00)

*Comments

Amendment Created: Amending the contract document to increase the amount, add to the deliverables and extend the date.

135 characters remaining

OK

Cancel

- SWIFT returns you to the *Document Management* page. Update the amendment template.
 - Note that the status is now "Draft." There is a statement that indicates an imported document.
 - SWIFT adds new buttons on the bottom of the page. You also now have a **View Original Document**, **View Amendment File**, and **Edit Amendment File** buttons.
 - Select the **Edit Amendment File** button to update the contract amendment template.

Amendment	1	Created On	09/28/18 12:00AM	Document Details
Version	2.00	Amended On	09/28/18 9:13AM	
Status	Draft	Last Modified On	09/28/18 9:13AM	
Includes Imported Document				

View and Edit Options:	Review and Approval:	Other Document Actions:
View Original Document	Route Internally	Send to Contacts
View Amendment File	Preview Approval	Refresh Document
Edit Amendment File	Submit for Approval	Recreate Document

4. SWIFT displays a message about the document. Open it.

[illegible]

5. Open the contract amendment Word document.

- Edit and save the checked out amendment document. Also, as a best practice, use track changes. If necessary, press **Save**. Save the file to a folder where it can easily be found.

IMPORTANT! DO NOT change the title of it or SWIFT will not be able to recognize it. Save it in Word.

SHARE_00000000000000000000145347_0.02.xml [Read-Only] [Compatibility Mode] - Word

REFERENCES MAILINGS REVIEW VIEW DEVELOPER ACROBAT

Delete Previous Next Show Comments Track Changes Simple Markup Show Markup Reviewing Pane Accept Reject Previous Next

Comments Tracking Changes

- Return to the *Document Management* page. Check in the document.

- You can see that the document has been checked out.
- SWIFT updates the *View and Edit Options* section. Press the **Check In** button.

Includes Imported Document

Checked Out By

View and Edit Options:

View Original Document

View Amendment File

Check In

Cancel Check Out

Review and Approval:

Approval Details

Internal Contacts/Signers

External Contacts/Signers

Document View Access

Other Document Actions:

Import Prior Document

Generation Log


- SWIFT displays the *Check In Document* page.
- Confirm or update the *Version* (e.g., “Minor” or “Major Version”). SWIFT defaults to “Minor.”
- Add comments and select **OK**.

Check In Document

Select the desired versioning option and enter a brief description describing the changes. Select the OK button to proceed and you will then be prompted to enter the filename.

SetID	SHARE	Contract ID	000000000000000000000000145347
Supplier	AMERICAN ENGINEERING TESTING INC		
Version	<input checked="" type="radio"/> Minor Version (0.03) <input type="radio"/> Major Version (1.00)		
*Comments	<div>Check In: created amendment to extend the expiration date and contract amount.</div> <div>176 characters remaining</div>		
<div>OK</div> <div>Cancel</div>			

- SWIFT displays the *Check In Amendment File* message. Select the **Browse** button.



- SWIFT displays your desktop. Select the correct file name and press **Open**.

File name: SHARE_000000000000000000145347_0.02.xml All Files (*.*)

Open Cancel

- SWIFT displays an updated *Check In Amendment File* message. Select **Upload**.

Check In Amendment File ✕

Help

C:\Users\jimcc04\Desktop\SHARE_0000000000000000 Browse...

Upload Cancel

- SWIFT opens your desktop. Press the file name of the contract amendment. Then, select **Open**.

File name:

7. SWIFT returns to the updated *Document Management* page.
 - There is now an Amendment 1.
 - The *Status* is “Draft.”
 - You can see that there is an imported document.
 - The *View and Edit Options* section allows you to view the original (imported) document and the amendment that you created using SWIFT’s document configurator.

SWIFT

STATEWIDE INTEGRATED FINANCIAL TOOLS

- The *Review and Approval* options allow you to route the contract document for electronic collaboration, approvals and electronic signatures. Approvers can choose to view the original contract document and the amended version. If authorized, they can edit the amended contract document.

Amendment 1	Created On 09/23/19 12:00AM	Document Details
Version 1.02	Amended On 09/23/19 1:32PM	
Status Draft	Last Modified On 09/23/19 1:38PM	
Includes Imported Document		

View and Edit Options:	Review and Approval:	Other Document Actions:
View Original Document	Route Internally	Send to Contacts
View Document	Route Externally	Refresh Document
View Amendment File	Preview Approval	Recreate Document
Edit Amendment File	Submit for Approval	Import Prior Document

You have successfully created a system-generated, electronic amendment of a contract document created outside of SWIFT.