

Introduction to SWIFT – Basic Navigation Quick Start Guide

September 1, 2019

Starting in December 2019, there will be changes to SWIFT. While the updated version will have a new look and feel, this upgrade will not affect how most processes are completed.

Note: There may be some changes to this information, since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact the SWIFT Help Desk: SWIFT.project@state.mn.us.

This guide will show the basic navigation changes in SWIFT, including tile-based navigation and the NavBar, the Elastic or Global Search, Notifications, and the Actions List.

- Step 1: Navigate to pages by selecting tiles.
- Step 2: Navigate to pages using the NavBar.
- Step 3: Select the look up glass icon to use Global or Elastic Search.
- Step 4: Select Notifications to view messages about Actions or Alerts.
- Step 5: Use the Actions List to personalize *My Homepage*, change preferences, or sign out.

Step 1: Navigate to pages by selecting tiles.

On *My Homepage*, users will see tiles that let you navigate to menus and pages.

1. Select a tile to open menu options that lead to pages.

For example, select the **Accounting** tile to open the *Accounting* menu.

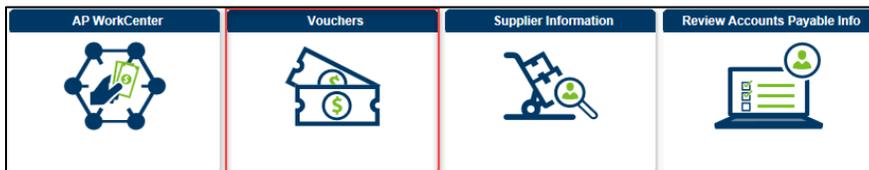


SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

2. Select more tiles to open submenu options. For example, select **Accounts Payable** tile to open *AP* submenus.



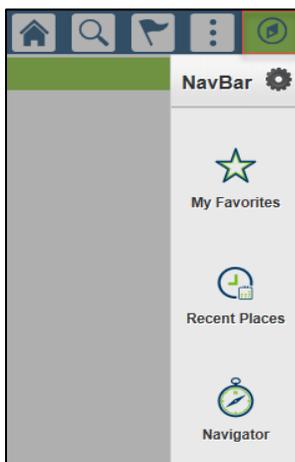
3. Select further tiles to open the page you're looking for. For example, select the **Vouchers** tile to open the *Regular Entry (Voucher)* page.



Step 2: Navigate to pages using the NavBar.

Use the Navigation Bar, or **NavBar**, to scroll to menu options not displaying as Tiles on *My Homepage*. **NavBar** has three features: *Recent Places*, *My Favorites*, and *Navigator*.

1. Select the **NavBar** to access *Recent Places*, *My Favorites*, and *Navigator*.



2. Select *My Favorites* to add or edit tiles to your favorites list and navigate to them quickly.
3. Select *Recent Places* to view or backtrack to recently opened Tiles or Pages in SWIFT.
4. Select *Navigator* to navigate through all available menu options and pages in SWIFT

Note: The difference between *Navigator* and tiles is that *Navigator* lets you access all available menu options, including those not displaying as tiles on *My Homepage*.

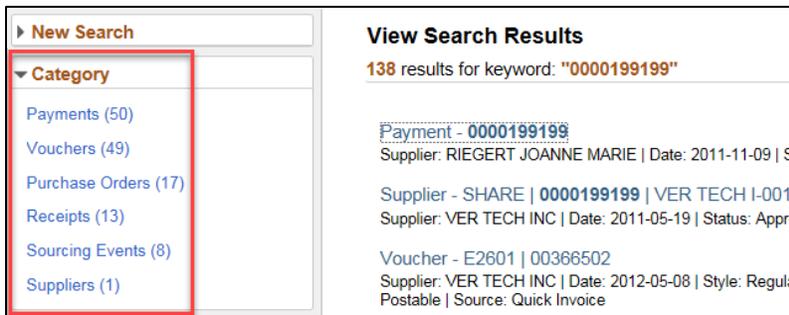
Step 3: Select the look up glass icon to use Global or Elastic Search.

To search for transactions across all modules in SWIFT, use the Global or Elastic Search option.

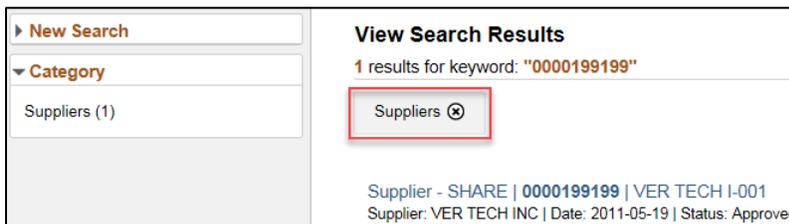
1. Select the look up glass icon to open Global or Elastic Search.
2. Select the drop-down list to search in a specific module, or select "All" to search across all modules.
3. Type your search criteria in the *Search* field, and press the **Search (>>)** button.



4. On the *Search Results* page, select a *Category* facet to narrow the search results.



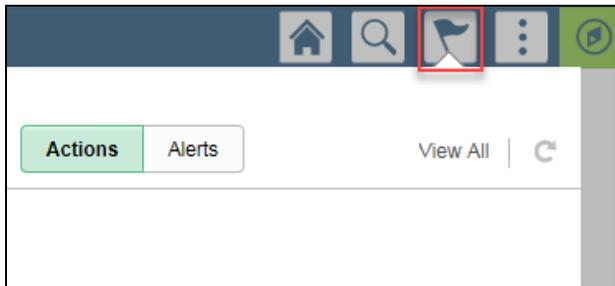
5. Press the **x** to remove or unselect the *Category* facet.



Step 4: Select Notifications to view messages about Actions or Alerts.

Select *Notifications* to review messages about *Actions* or *Alerts* on SWIFT.

1. Select the flag icon to open *Notifications*.
2. Select *Actions* to view messages about approvals (e.g., if a voucher was denied for approval).
3. Select *Alerts* to view business transactions pending action in a user's workflow (what work items to complete next).



Step 5: Use the Actions List to personalize *My Homepage*, change preferences, or sign out.

If you wish to personalize your Homepage, change your preferences, or sign out, select the **Actions List**.

1. Select the triple-dot icon to open the *Actions List*.
2. Personalize *My Homepage* by selecting *Personalize Homepage*.
3. Update information on your profile or change general settings by selecting *My Preferences*.
4. Log out of the Administrative Portal by selecting *Sign Out*.

