Overview of Changes in Asset Management

This overview contains information about changes to the Asset Management module with the SWIFT Limited Upgrade, including:

- Asset Management WorkCenter and Navigation Collections
- Global Search
- Related Content
- Disposal Worksheet
- Asset Integration Enhancements

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

**Asset Management WorkCenter and Navigation Collections**

You will have the option of working in the Asset Management WorkCenter or one of several navigation collections.

- The Asset Management WorkCenter provides a centralized place where you can access frequently used pages, queries, processes, and reports.
- The Navigation Collections bring together related tasks, activities, and processes.

View the Asset Management Quick Start Guide to learn more about how the WorkCenter and Navigation Collections are organized.
Global Search

The new Global Search may help you find assets more quickly.

- Select the Global Search icon in the top bar and enter your search criteria. In the example below, the search is limited to looking for Asset Management records with a specific Asset ID.

- Launch the search. Records matching your search criteria display on the Search Results page.

- Select a record in the search results to view more information. In this example, selecting the asset brought up the Basic Add pages for the asset.
Related Content

When you see a red triangle in the top right of an entry field, you can right-click the triangle and select an option in the drop-down listing to go to a related page.

- For example, when you right-click the Amount field on the Acquisition Details tab of the Basic Add pages, the Action drop-down displays.

- Selecting the Review Cost option, brings you to the Review Cost page to see current cost information.
Disposal Worksheet

The *Disposal Worksheet* page has been improved. You can use the filters to display multiple assets, select specific assets to retire from the list, and set the disposition code, accounting date, and retirement date to apply to the assets. The worksheet can now be used to dispose of Non-Financial assets.

### Asset Integration Enhancements

The integration of assets from the Purchasing, Accounts Payable, and Project Costing modules has been streamlined.

- The Interface processes and review pages are now all available in the **Asset Interface** navigation collection.
The financial and physical interface review and approve pages have been consolidated into a single page.

The Consolidation and Unitization components have been enhanced. The Consolidation now allows the consolidation of assets with multiple ChartField strings. In SWIFT 9.1, only the first ChartField distribution would be applied to the consolidated asset. The Unitization function now has an “EZ Unitize” button to streamline the process. These components are used to fix asset records before they are loaded into Asset Management.

- The Consolidate component is used to combine asset records that have partial (fractional) quantities into a single asset.
- The Unitize component is used to change an asset record that has multiple quantities to multiple, individual assets with single quantity.

**Note:** It is recommended that the correct receipting process is used in the Purchasing module, rather than relying on these processes.