SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Asset Management Quick Start Guide

September 1, 2019

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

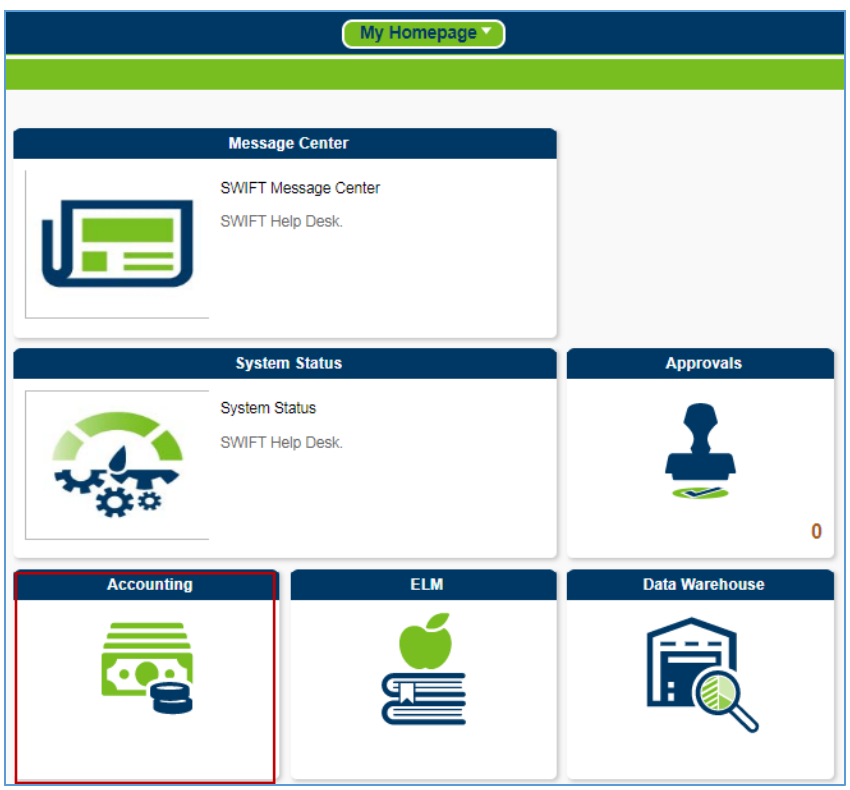
Note: There may be some changes to this information since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact us at: SWIFT.project@state.mn.us.

This guide covers how to navigate to Asset Management module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles. You may see more or fewer options than shown in this guide.

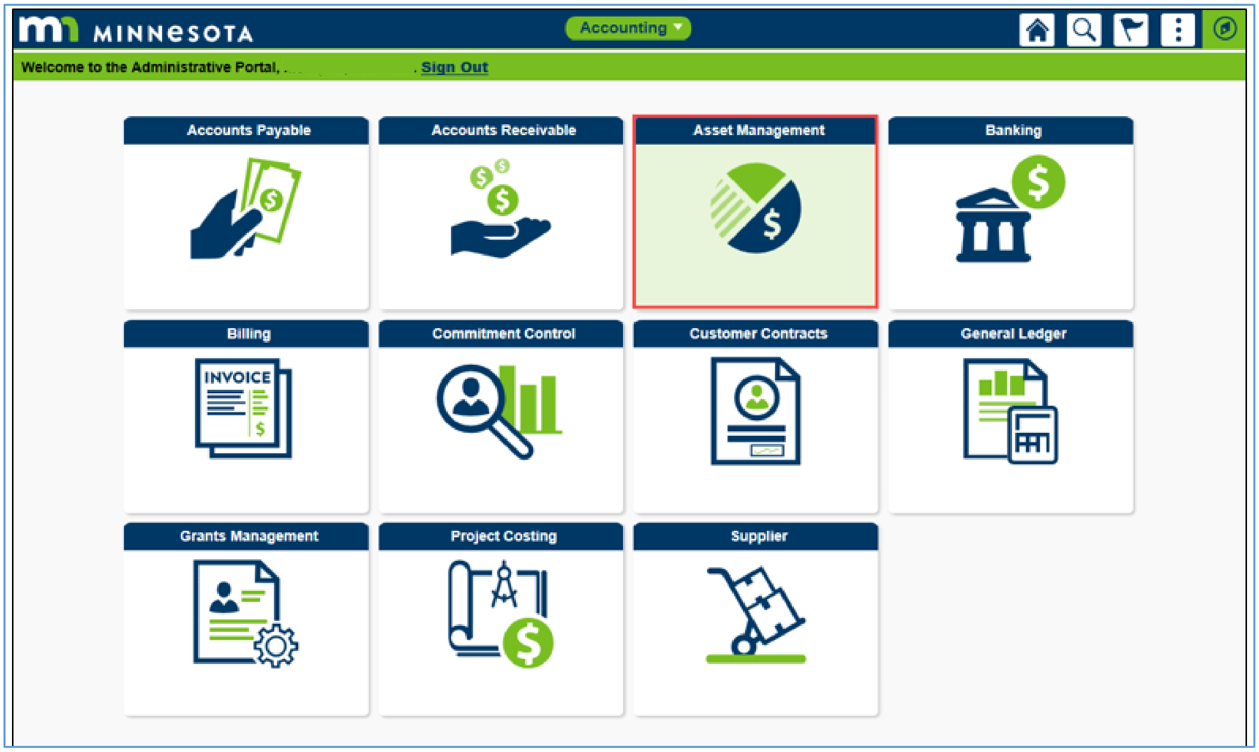
- Step 1: Navigate to the Asset Management Module
- Step 2: View Asset Management WorkCenter
- *Step 3: View Asset Management Navigation Collections*

Step 1: Navigate to the Asset Management Module

1. From **My Homepage**, select the **Accounting** tile.



2. On the *Accounting* page, select the **Asset Management** tile.

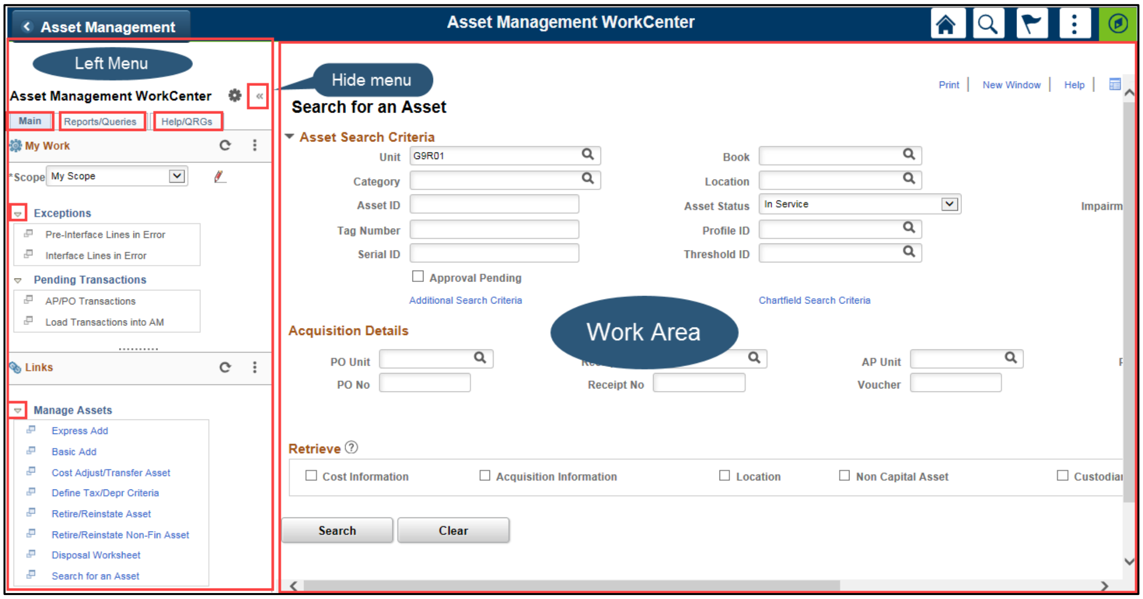


Step 2: View the Asset Management WorkCenter

The Asset Management WorkCenter provides a centralized place where you can access frequently used pages, queries, processes, and reports.

1. Click on the **Asset Management WorkCenter** tile.

2. By default, the WorkCenter displays the *Search for an Asset* inquiry in the **Work Area** on the right side of page.



- The left menu includes the **Main**, **Reports/Processes**, and **Help/QRGs** tabs.
- Click on the **Expand/Collapse** ( ) drop-down arrow to hide or see options in the **Left Menu**.
- Click on the **Hide Menu** ( ) double-arrow in the header of the menu to hide the **Left Menu**.

3. The **Left Menu** includes the **My Work**, **Links**, **Queries**, **Reports/Processes** and **Help/QRGs** sections with the folders and pages described below.

Left Menu Section	Description of Folders and Pages
My Work	The **My Work** section on the **Main** tab includes inquiries related to the Asset Integration process. **WARNING!** Only staff with a thorough knowledge of the integration process should perform the actions allowed on these inquiry pages. Contact Agency Assistance with your questions at AgencyAssistance.MMB@state.mn.us.
Links	The **Links** section on the **Main** tab includes links to commonly used pages. Folders and pages include: • **Manage Assets**: Express Add, Basic Add, Cost Adjust/Transfer Asset, Define Tax/Depr Criteria, Retire/Reinstate Asset, and Disposal Worksheet pages. • **Asset Review**: Review Cost, Review Book, Asset Depreciation, Cost and Depreciation Summary, Review Financial Entries, and Review Asset Journals pages.

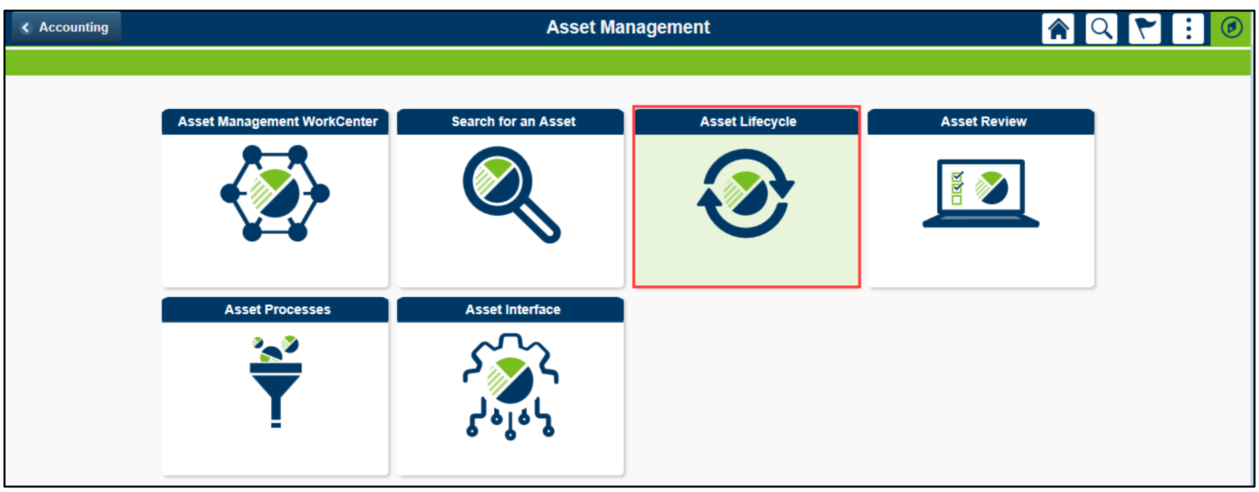
Left Menu Section	Description of Folders and Pages
Queries	The **Queries** section on the **Reports/Queries** tab includes links to frequently used queries: Asset Profile IDs, Agency Asset General Information, and PO Lines w/ Asset Information.
Reports/Processes	The **Reports/Processes** section on the **Reports/Queries** tab includes links to asset processes. Folders and pages include: • **Interface**: Process pages used in the Asset Integration process. **WARNING!** Only staff with a thorough knowledge of the integration process should run these processes manually. Contact Agency Assistance with your questions at AgencyAssistance.MMB@state.mn.us. • **Depreciation Calculation:** Depreciation Calculation, and Open Transactions pages. • **Monitor**: Process Monitor, Report Manager, and Query Viewer pages.

4. To return to the *Asset Management* homepage, click on the **<Asset Management** back button on the top-left of page.

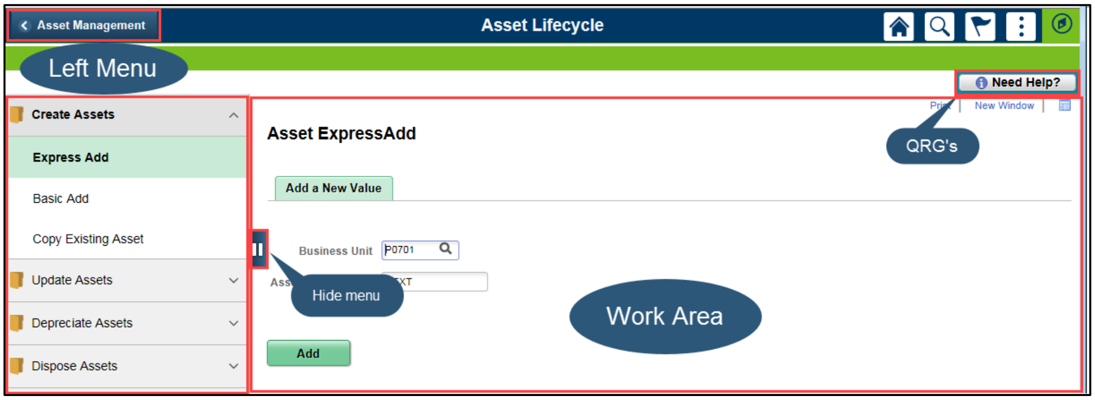
Step 3: View the Asset Management Navigation Collections

You can also work in navigation collections that bring together related tasks, activities, and processes.

1. For example, select the **Asset Lifecycle** navigation collection tile.



2. Navigation collections also have a **Work Area** on the right and the **Left Menu**. You'll click on the drop-down arrows in the **Left Menu** to expand the menu of options.



- Here's a listing of the navigation collections in the Asset Management module and a description of their use.

Navigation Collection	Description of Folders and Pages
Search for an Asset	The *Search for an Asset* page opens by default.
Asset Lifecycle	The *Asset Express Add* page opens by default. Folders and pages include: • **Create Assets**: Express Add, Basic Add, and Copy Existing Asset pages. • **Update Assets**: Cost Adjust/Transfer Asset, Define Criteria (Book) pages. • **Depreciate Assets**: Calculate Depreciation, Open Transactions, and Review Depreciation pages. • **Dispose Assets**: Disposal Worksheet and Retire/Reinstate Asset pages.
Asset Review	The *Asset Cost History* page opens by default. Folders and pages include: • **Asset History**: Review Cost, Review Depreciation, Review Financial Entries, and Print an Asset pages. • **Acquisition Information**: Review Purchase Orders, Review Receipts and Review Vouchers pages.
Asset Processes	The *Change/Delete Pending Transaction* page opens by default. Also includes the *Adjust Accumulated Depreciation* page.
Asset Interface	The *Process Receipts* page opens by default. This collection Includes process pages related to the Asset Integration process. **WARNING!** Only staff with a thorough knowledge of the integration process should perform the actions allowed on these pages. Contact Agency Assistance with your questions at AgencyAssistance.MMB@state.mn.us.

- You'll select the back button on the upper-left to return to the **Asset Management** homepage.