

QUICK REFERENCE GUIDE

November 1, 2019

Use the Search for an Asset Page

The *Search for an Asset* page is the starting point for many SWIFT Asset Management transactions. You can search for assets using a variety of search criteria in many different combinations, such as Asset ID, Asset Type, Location, Asset Status, Profile ID, PO Number or Approp ID.

Once the asset(s) meeting your search criteria have been located, they appear on a search results list. This list provides many views of asset information.

You can select an asset in the search results list and quickly navigate to another Asset Management page to work on the asset. Commonly used pages you can navigate to include: Basic Add, Cost Adjust/Transfer Asset, Cost History, Asset Depreciation, Retirement, Copy Asset, Define Tax/Depr Criteria (Book Info for the Asset).

Steps to complete:

- Step 1: Enter Search Criteria on the Search for an Asset page
- Step 2: Optionally, Enter Additional Search Criteria
- Step 3: Optionally, Enter ChartField Search Criteria
- Step 4: Enter Search Results Selections in the Retrieve Section
- Step 5: View Search Results
- Step 6: Select an Asset and Component to Work With

Step 1: Enter Search Criteria on the Search for an Asset page

You can search for an asset based on the specified criteria on the *Search for an Asset* page. After you have performed the search, you can also use links to quickly access other Asset Management pages to review or enter asset information for the selected asset, such as review asset depreciation or change the funding string for an asset.

1. Navigate to the *Search for an Asset* page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Asset Management, Search for an Asset tile.
WorkCenter	Accounting, Asset Management, Asset Management WorkCenter. The Search for an Asset page displays by default.

2. Enter information in the **Asset Search Criteria** section as described below.

- The Asset Status criteria field is initially set to “In Service”. If you are searching for assets with other statuses, such as “Received (Not in Service)”, you’ll need to change this search field.
- The percent sign (%) can be used as a wild card to replace one or more characters of a field.

Search for an Asset

▼ **Asset Search Criteria**

Unit <input type="text" value="G0201"/>	Book <input type="text"/>	Parent ID <input type="text"/>
Category <input type="text"/>	Location <input type="text"/>	Area ID <input type="text"/>
Asset ID <input style="border: 2px solid red;" type="text" value="%4496%"/>	Asset Status <input style="border: 2px solid red;" type="text" value="In Service"/>	Impairment Processing <input type="text"/>
Tag Number <input type="text"/>	Profile ID <input type="text"/>	Group ID <input type="text"/>
Serial ID <input type="text"/>	Threshold ID <input type="text"/>	

Approval Pending [Chartfield Search Criteria](#)

[Additional Search Criteria](#)

Acquisition Details

PO Unit <input type="text"/>	Receipt Unit <input type="text"/>	AP Unit <input type="text"/>	PC Bus Unit <input type="text"/>
PO No <input type="text"/>	Receipt No <input type="text"/>	Voucher <input type="text"/>	Project ID <input type="text"/>

Retrieve ?

Cost Information Acquisition Information Location Non Capital Asset Custodian Lease

 Drill-Down To:

Field	Field Description
Unit	Accept the default <i>Business Unit</i> or click on the Lookup icon and select a different <i>Business Unit</i> .
Category	Click on the Lookup icon and select an asset <i>Category</i> to limit your search (such as Equipment, Furniture and Fixtures).
Asset ID	Enter an <i>Asset ID</i> to limit your search. The percent sign % can be used to replace one or more characters.
Tag Number	Enter a <i>Tag Number</i> if your agency uses asset tags.
Serial ID	Enter a <i>Serial ID</i> to limit your search.
Book	Minnesota only uses one book “MINN”.
Location	Click on the Lookup icon and select the <i>Location</i> .

Field	Field Description
Asset Status	Accept the default "In Service" or select a different <i>Asset Status</i> from the drop-down list. Commonly used options include: <ul style="list-style-type: none"> • Disposed: Asset has been disposed of. • In Service: Asset is in service and depreciating (when applicable) • Received (Not in Service): Asset has been received but not yet placed in service. • Transferred: The asset has been transferred to a different business unit.
Profile ID	Click on the Lookup icon and select a <i>Profile ID</i> to limit your search.
Threshold ID	State of Minnesota does not use.
Parent ID	If you select a value in the <i>Parent ID</i> field, SWIFT will retrieve the parent asset and any child assets associated with it.
Area ID	State of Minnesota does not use.
Impairment Processing	State of Minnesota does not use.
Group ID	State of Minnesota does not use.
Approval Pending	State of Minnesota does not use.

3. Optionally, search for purchased assets by entering search criteria in the **Acquisition Details** section as described below.

Acquisition Details

PO Unit <input style="width: 80%;" type="text"/>	Receipt Unit <input style="width: 80%;" type="text"/>	AP Unit <input style="width: 80%;" type="text"/>	PC Bus Unit <input style="width: 80%;" type="text"/>
PO No <input style="width: 80%;" type="text"/>	Receipt No <input style="width: 80%;" type="text"/>	Voucher <input style="width: 80%;" type="text"/>	Project ID <input style="width: 80%;" type="text"/>

Field	Field Description
PO Unit	Enter the <i>Purchase Order Unit</i> (same as your <i>Business Unit</i> .) Note: if you do not enter additional criteria, all purchased assets for the Purchase Order Unit will be returned in the search results.
PO No.	Enter a PO Number ("3000000107"). The percent sign % wild card can be used.
Receipt Unit	Enter the <i>Receipt Unit</i> (same as <i>Business Unit</i> .) Note: if you do not enter additional criteria, all receipted assets for the <i>Receipt Unit</i> will be returned in the search results.
Receipt No	Enter a <i>Receipt Number</i> ("0000000031"). The percent sign % wild card can be used.
AP Unit	Enter the <i>Accounts Payable Unit</i> (same as <i>Business Unit</i> .)

Field	Field Description
Voucher	Enter a <i>Voucher ID</i> . The percent sign % wild card can be used.
PC Bus Unit	Enter a <i>PC Bus Unit</i> (part of project coding).
Project ID	Click on the Lookup icon and select a <i>Project ID</i> .

Note: Multiple rows often display for purchased assets. You may see a row for the receipt and voucher transactions, and you may see additional rows if multiple funding sources were used. You only need to select one of the rows before selecting a component in Step 6.

Search for an Asset

Asset Search Criteria

Unit <input type="text" value="G0201"/>	Book <input type="text"/>	Parent ID <input type="text"/>
Category <input type="text"/>	Location <input type="text"/>	Area ID <input type="text"/>
Asset ID <input type="text"/>	Asset Status <input type="text" value="In Service"/>	Impairment Processing <input type="text"/>
Tag Number <input type="text"/>	Profile ID <input type="text"/>	Group ID <input type="text"/>
Serial ID <input type="text"/>	Threshold ID <input type="text"/>	

Approval Pending

Additional Search Criteria Chartfield Search Criteria

Acquisition Details

PO Unit <input type="text" value="G0201"/>	Receipt Unit <input type="text" value="G0201"/>	AP Unit <input type="text" value="G0201"/>	PC Bus Unit <input type="text"/>
PO No <input type="text" value="3%6771"/>	Receipt No <input type="text" value="0000011181"/>	Voucher <input type="text" value="00203335"/>	Project ID <input type="text"/>

Retrieve ⓘ

Cost Information Acquisition Information Location Non Capital Asset Custodian Lease

 Drill-Down To:

Search Results - Select One Asset to Continue

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Asset Information	Asset Cost Information	Acquisition Details	Owner/Custodian	Work Maintenance	Work Maintenance 2	More...					
Unit	Asset ID	Description	PO Unit	PO No.	BU Recv	Receipt No	AP Unit	Voucher ID	PC Bus Unit	Project ID	Activity
<input type="radio"/>	G0201	000001414813	2018 Ford Fusion Hybrid P0L 4d	G0201	3000006771	G0201	0000011181	G0201	00203335		
<input type="radio"/>	G0201	000001414813	2018 Ford Fusion Hybrid P0L 4d	G0201	3000006771	G0201	0000011181	G0201	00203335		
<input type="radio"/>	G0201	000001414813	2018 Ford Fusion Hybrid P0L 4d	G0201	3000006771	G0201	0000011181	G0201	00203335		

Step 2: Optionally, Enter Additional Search Criteria

Optionally, click on the *Additional Search* link to search by additional asset fields, such as Asset Type, Custodian, or Manufacturer.

1. Click on the **Additional Search Criteria** link to further limit your search.

Search for an Asset

▼ **Asset Search Criteria**

Unit <input type="text" value="G0201"/>	Book <input type="text"/>	Parent ID <input type="text"/>
Category <input type="text"/>	Location <input type="text"/>	Area ID <input type="text"/>
Asset ID <input type="text"/>	Asset Status <input type="text" value="In Service"/>	Impairment Processing <input type="text"/>
Tag Number <input type="text"/>	Profile ID <input type="text"/>	Group ID <input type="text"/>
Serial ID <input type="text"/>	Threshold ID <input type="text"/>	

Approval Pending

Additional Search Criteria
Chartfield Search Criteria

2. The *More Filter Options* page displays. Enter search criteria as described below.

Field	Field Description
Asset Type	Select an Asset Type from the drop-down listing (such as “Equipment”, “Facility”, “Fleet”, “Furniture”).
Asset Subtype	If your agency uses <i>Asset Subtypes</i> , you can click on the Lookup and select an <i>Asset Subtype</i> to limit your search. An <i>Asset Type</i> must be selected first.
Component of	State of Minnesota does not use.
Clustered Asset	State of Minnesota does not use.
Employee ID	Click on the Lookup icon and select an <i>Employee ID</i> for a custodian to limit your search.
Custodian	Enter a <i>Custodian</i> to limit your search. The format is “Last Name, First Name”. The comma is required.
Manufacturer ID	Click on the Lookup icon and select a <i>Manufacturer ID</i> to limit your search.
Manufacturer Name	Click on the Lookup icon and select a <i>Manufacturer Name</i> to limit your search.
Model	Click on the Lookup icon and select a <i>Model</i> to limit your search.
VIN	Enter a VIN to limit your search.

- Options in the **Asset Resource Information** and **Other Information** sections are not used or are not recommended for use.

3. Click on the **OK** button to return to the *Search for Asset* page and your criteria will be used to limit your search results.
 - If you no longer want to use the optional filters, click on the **Clear** button.

Step 3: Optionally, Enter ChartField Search Criteria

Use the *ChartField Search Criteria* link to search for assets related to a specific funding.

1. Click on the **ChartField Search Criteria** link in the **Asset Search Criteria** section.

2. The *More Filter Options* page displays. Enter search criteria as described below.

Field	Field Description
Fund Code	Click on the Lookup icon to select a valid <i>Fund</i> . Fund is the building block of Government Accounting. All transactions in the system must have a valid Fund.
Financial Department ID	Click on the Lookup icon to select a valid <i>Financial Department ID</i> . The <i>Fin Dept ID</i> (Financial Department Identifier) represents the organizational function to which revenues and other activities must be applied. Combined with other ChartField values, Fin Dept ID's form the basis of department budgets that track revenues and expenditures.
Appropriation ID (CF3)	Click on the Lookup icon to select an <i>Appropriation ID</i> .
Sub Account (Class)	Optionally, click on the Lookup icon to select a Sub Account.
Statewide Cost (Prog)	Optionally, click on the Lookup icon to select a <i>Statewide Cost</i> code.
Project	Optionally, click on the Lookup icon and select a <i>Project ID</i> .
Agency Cost 1 (CF1) Agency Cost 2 (CF2)	Optionally, click on the Lookup icon and select an <i>Agency Cost 1</i> or <i>Agency Cost 2</i> code. <i>Agency Cost 2</i> code. <i>Agency Cost 1</i> and <i>Agency Cost 2</i> are agency specific fields that are used at the agency's discretion.

- From the *More Filter Options* page, click on the **OK** button to return to the *Search for Asset* page and your criteria will be used to limit your search results.
 - If you no longer want to use the optional filters, click on the **Clear** button.

Step 4: Enter Search Results Selections in the Retrieve Section

You can use the **Retrieve** section to indicate what type of information will be retrieved about assets that meet your search criteria.

- Complete the **Retrieve** section as described below. Click on the **Help** (?) icon to learn more about the Retrieve options.
 - If you entered search criteria that relate to cost information, acquisition details, location, or custodian, it is not necessary to check the option; the information will be retrieved automatically.
 - The **Asset Information** tab information is always retrieved (Asset ID, Description, Asset Type, Tag Number, etc.)

Retrieve ?

Cost Information
 Acquisition Information
 Location
 Non Capital Asset
 Custodian
 Lease

Checkbox	Description
Cost Information	Click on the <i>Cost Information</i> checkbox to view Asset Cost Information tab information in the search results such as <i>Fund, Fin DeptID, and Approp ID</i> .
Acquisition Information	Click on the <i>Acquisition Information</i> checkbox to view Acquisition Details tab information in the search results, such as <i>PO Number and Voucher ID</i> .
Location	Click on the <i>Location</i> checkbox to view asset Location Codes in the search results on the More tab.
Non Capital Asset	The <i>Non Capital Asset</i> check box is used only when <i>Acquisition</i> and <i>Cost</i> check boxes are active or a search field having value for both Acquisition and Cost is used.
Custodian	Click on the <i>Custodian</i> checkbox to view Owner/Custodian tab information in the search results.
Lease	State of Minnesota does not use.

Step 5: View Search Results

After selecting your search criteria, you are ready to launch your search and view the results.

1. Click on the **Search** button. The assets meeting your criteria display in the **Search Results** listing.

Search for an Asset

Asset Search Criteria

Unit: G0201 | Book: | Parent ID: | Category: | Location: | Area ID: | Asset ID: %1414813 | Asset Status: In Service | Impairment Processing: | Tag Number: | Profile ID: | Group ID: | Serial ID: | Threshold ID: | Approval Pending

Acquisition Details

PO Unit: | Receipt Unit: | AP Unit: | PC Bus Unit: | PO No: | Receipt No: | Voucher: | Project ID: |

Retrieve

Cost Information | Acquisition Information | Location | Non Capital Asset | Custodian | Lease

Search | Clear | Drill-Down To: --- Select Component --- | GO!

Search Results - Select One Asset to Continue

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Asset Information | Asset Cost Information | Acquisition Details | Owner/Custodian | Work Maintenance | Work Maintenance 2 | More...

Unit	Asset ID	Description	Asset Type	Asset Subtype	Tag Number	Serial ID	Status
<input type="radio"/>	G0201	000001414813	2018 Ford Fusion Hybrid P0L 4d	Fleet	1828843	10329	In Service
<input type="radio"/>	G0201	000001414813	2018 Ford Fusion Hybrid P0L 4d	Fleet	1828843	10329	In Service
<input type="radio"/>	G0201	000001414813	2018 Ford Fusion Hybrid P0L 4d	Fleet	1828843	10329	In Service

Note: Multiple rows often display for purchased assets. You may see a row for the receipt and voucher transactions, and you may see additional rows if multiple funding sources were used. You only need to select one of the rows before selecting a component in Step 6.

- View the Search Results. Information on the tabs include:

Tab	Description
Asset Information	Displays <i>Unit, Asset ID, Description, Asset Type, Asset Subtype, Tag Number, Serial ID</i> and <i>Status</i> .
Asset Cost Information	Displays <i>Fund, Fin DeptID, SW Cost, Sub Acct, Project, Agcy Cost 1 and 2, Approp Id, Category, Cost Type, Quantity, Cost, and Currency</i> .
Acquisition Details	Displays <i>PO Unit, PO No., BU Recv, Receipt No., AP Unit, Voucher ID, PC Bus Unit, Project ID, and Activity</i> .
Owner/Custodian	Displays <i>Employee ID, Custodian, Asset Custodian DeptID, and Offsite flag</i> .
Work Maintenance	Displays <i>Capitalized Asset</i> flag.
Work Maintenance 2	Displays <i>VIN number, Linear flag, and Non-owned Asset</i> flag.
More	Displays <i>Profile ID, Parent ID, Location, Manufacturer ID, and Model number</i> .

Step 6: Select an Asset and Component to Work With

Now you can select an asset listed in the search results and select a component from the **Drill-Down To** listing to work with the asset.

- Select an asset in the search results by clicking on the corresponding button.

The screenshot shows the 'Search for an Asset' interface. It includes search criteria fields for Unit, Book, Parent ID, Category, Location, Area ID, Asset ID, Asset Status, Impairment Processing, Tag Number, Profile ID, Group ID, and Serial ID. There are also checkboxes for 'Approval Pending' and 'Additional Search Criteria'. Below this is the 'Acquisition Details' section with fields for PO Unit, Receipt Unit, AP Unit, PC Bus Unit, PO No, Receipt No, Voucher, and Project ID. A 'Retrieve' section has checkboxes for Cost Information, Acquisition Information, Location, Non Capital Asset, Custodian, and Lease. At the bottom, there is a 'Search' button, a 'Clear' button, a 'Drill-Down To:' dropdown menu (with 'Select Component' selected), and a 'GO!' button. Below the search bar is a 'Search Results - Select One Asset to Continue' section with a table of results. The first result is highlighted with a red box.

Unit	Asset ID	Description	Asset Type	As	ID	Status
G0201	000001414813	2018 Ford Fusion Hybrid PDL 4d	Fleet		1828843 10329	In Service

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Note: Multiple rows often display for purchased assets. You may see a row for the receipt and voucher transactions, and you may see additional rows if multiple funding sources were used. You only need to select one of the rows before selecting a component.

- After selecting an asset in the search results, select a component from the **Drill-Down To** listing and click on the **GO!** button. Options include.

Component	Description
Asset Accounting Entries	Opens the <i>Review Financial Entries</i> page in a new window. Refer to the " View Financial (Accounting) Entries " guide.
Asset Basic Information	Opens the <i>Basic Add</i> pages in a new window where you can view and update the asset record. Refer to the " Create (or Update) Assets with Basic Add " guide.
Asset Cost Adjust/Transfer	Opens the <i>Cost Adjust/Transfer Asset</i> page in a new window. This page is used to maintain financial information.
Asset Cost History	Opens the <i>Review Cost</i> pages in a new window. Refer to the " View Cost History " guide.
Asset Depreciation	Opens the <i>Asset Depreciation</i> pages in a new window. Refer to the " View Depreciation Information " and " Run Depreciation Calculation Between Transactions " guides.
Asset Retirements	Opens the <i>Retire/Reinstate Asset</i> page for a Financial Asset. Refer to the Retire and Asset (Disposal) or Reinstate a Retire Asset guides. If you need to retire or reinstate a non-financial asset or use the Disposal worksheet, you will need to access the pages in the Asset Management WorkCenter or the Asset Lifecycle navigation collection.
Audit Logs	This option is not used.
Copy Asset	Opens the <i>Create Asset Copies</i> pages in a new window. Refer to " Create Assets with Copy Asset " guide.
Define Tax/Depr Criteria	Opens the <i>Define Tax/Depr Criteria</i> pages which display the Book Depreciation settings for the asset.
Print an Asset	Opens the <i>Printable View of Asset</i> page. Refer to the " Print an Asset " guide.
View Component Hierarchy	This option is not used.