

Approval Process 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 the SWIFT Help Desk: SWIFT.project@state.mn.us.

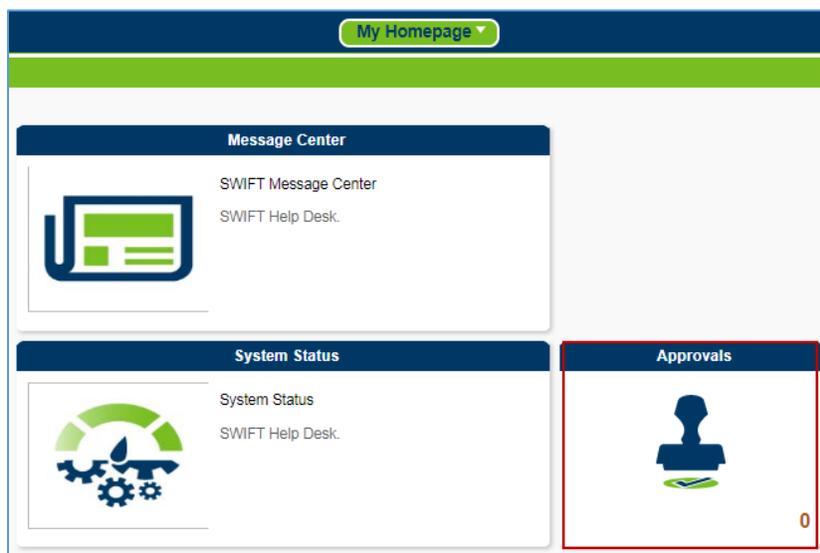
This overview contains information about changes to the Approval Process from the SWIFT Limited Upgrade, including an updated voucher approval as well as notifications.

Approval Process

In the SWIFT Limited Upgrade, the **Approvals** tile will replace the Worklist used in the prior version of SWIFT. The Approver can approve vouchers by navigating to this tile.

This example shows a voucher approval.

1. On *My Homepage*, select the **Approvals** tile to open the *Approvals* page.



2. The *Pending Approvals* page will display. From the left-menu, select the *Voucher* category, and then select a voucher from the *Voucher* list.
3. Voucher information will display under the *Summary* and *Voucher Lines* sections. To approve the voucher, check mark the line(s) in the *Voucher Lines* section, and press the **Approve** button.

100.00 USD

1 line(s) are pending your approval

[Approve](#) [Deny](#) [Request Information](#)

Summary

| | | |
|---|--------------------------------------|--------------------------------------|
| Business Unit: G1001 | Remit Supplier: SHARE 0000192571 | Voucher ID: 00021902 |
| Invoice Number: 98765 | Name 1: MINNEAPOLIS BUSINESS COLLEGE | Created By: [Redacted] |
| Supplier Name: MINNEAPOLIS BUSINESS COLLEGE | Name 2: [Redacted] | Modified By: Run Control Operator ID |
| Due Date: 01/12/18 | Address Line 1: 1711 W COUNTY RD B | Invoice Date: 12/13/17 |
| Voucher Source: Online | Address Line 2: [Redacted] | Voucher Style: Regular Voucher |
| | Address Line 3: [Redacted] | View Voucher |
| | Address Line 4: [Redacted] | |
| | County: RAMSEY | |
| | City: ROSEVILLE MN 55113 | |
| | Country: USA | |

Voucher Lines

[Pending](#) [All](#)

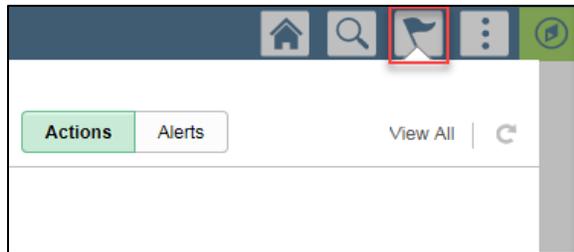
Select

| | | | | |
|-------------------------------------|-----------------------|----------------|-----------------------------|-----------------|
| <input type="checkbox"/> | Line : 1 | Non-PO Voucher | Budget Date : 12/13/2017 | Agency Cost 1 : |
| <input checked="" type="checkbox"/> | Distrib Line : 1 | | Fund : 1000 | Agency Cost 2 : |
| | Merch Amount : 100.00 | | Dept ID : G1031300 | PC BU : |
| | Quantity : 0 | | Appropriation ID : G1000001 | Project : |
| | Price : 00 | | Account : 430021 | Activity : |
| | Descr : | | Statewide Cost : | Source Type : |

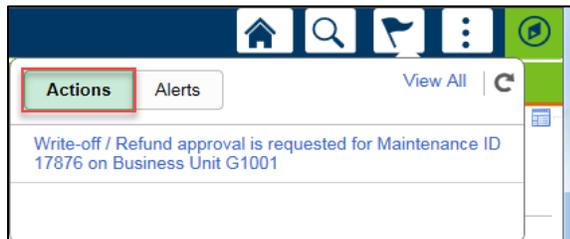
Notifications

To see if you have any notifications about approvals, select the *Notifications* top-bar flag icon, which lets you 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 before it can be approved, if any).

