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 guide covers how to navigate to General Ledger 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 General Ledger Module
- Step 2: View GL/KK WorkCenter
- Step 3: View KK Process Navigation Collection

**Step 1: Navigate to the General Ledger Module**

1. From My Homepage, select the Accounting tile.
2. On the Accounting page, select the General Ledger tile.

Step 2: View the GL/KK WorkCenter

The GL/KK WorkCenter provides a centralized place where you can access frequently used pages, queries, processes, and reports.

Note: The General Ledger and Commitment Control modules share a WorkCenter.

1. Click on the GL/KK WorkCenter tile.
2. By default, the WorkCenter displays the Appropriation Overview inquiry in the Work Area on the right side of page.

- Expand the drop-downs in the Left Menu to select WorkCenter options.
- Click on the Hide Menu button to hide the Left Menu.
- Select the Need Help? button to access SWIFT QRG’s and Help Desk contact information (top right of page).

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

<table>
<thead>
<tr>
<th>Left Menu Section</th>
<th>Description of Folders and Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Work</td>
<td>View Journal posting information. Folders and pages include:</td>
</tr>
<tr>
<td></td>
<td>• Manage KK Journals: KK Journals Not Ready to Post and Ready to Post.</td>
</tr>
<tr>
<td></td>
<td>• Manage GL Journals: GL Journals Not Ready to Post and Ready to Post.</td>
</tr>
<tr>
<td>Links</td>
<td>Access commonly used pages. Folders and pages include:</td>
</tr>
<tr>
<td></td>
<td>• KK Links: Appropriation Overview, Budget Details, Budgets Overview, Enter Budget Journals, Enter Budget Transfers, and KK Exceptions pages.</td>
</tr>
<tr>
<td></td>
<td>• GL Links: Create/Update GL Journal Entries, Import GL Journals, ChartField Values, SpeedTypes, Accounting Tags, and Tree Viewer pages.</td>
</tr>
<tr>
<td>Queries</td>
<td>Run frequently used queries.</td>
</tr>
</tbody>
</table>
### Reports/Processes

Run frequently used reports and processes. Folders and pages include:

- **My Reports**: Allotment w/in Approp, Manager’s Financial, and Approp Transfer Detail, and Trial Balance Report pages.
- **Monitor**: Process Monitor, Report Manager, and Query Viewer.

4. To return to the *General Ledger* homepage, click on the `<General Ledger` back button on the top-left of page.

### Step 3: View the GL Process Navigation Collection

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

1. For example, select the *GL Process* 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. The *Create/Update Journal Entries* page displays by default.
The **GL Process** navigation collection includes the following folders and pages.

<table>
<thead>
<tr>
<th>Left Menu Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Budget Information</td>
<td>View commonly used inquiries and reports. &lt;br&gt;• Journals, Ledger, and Ledger Period Comparison inquiry.  &lt;br&gt;• Trial Balance and Summary Trial Balance by CFs Report pages.</td>
</tr>
<tr>
<td>Tree Viewer</td>
<td>View the Fin Dept ID hierarchy for expenditures and revenue.</td>
</tr>
</tbody>
</table>

You’ll select the back button on the upper-left to return to the **General Ledger** homepage.