INTRO

Introduction to SWIFT

User Guide

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Minnesota Management & Budget
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# Introduction to SWIFT

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Introduction to SWIFT

Course Overview

SWIFT stands for Statewide Integrated Financial Tools. SWIFT refers to the State of Minnesota’s online financial management system for business processes across State agencies. Agencies may use SWIFT for procurement, accounting, and reporting functionalities, such as the following processes:

- Making purchases
- Creating contracts
- Managing transactions
- Paying bills
- Receiving payments
- Working with suppliers
- Reporting

This user guide provides an overview of SWIFT in three lessons:

- **Lesson 1: The Financial Management System** – Background and navigation of SWIFT
- **Lesson 2: System Modules** – Modules for Procurement, Accounting and Reporting
- **Lesson 3: Resources** – Training, Help Desk Support, and Weekly Updates
Lesson 1: Financial Management System

Lesson Overview

SWIFT is the financial management system for Minnesota State agencies.

After completing this lesson, you should be able to:

- Log in to SWIFT.
- Navigate SWIFT.

Background Information

Topic Overview

This topic covers background information about SWIFT.

After completing this topic, you should be able to:

- Comprehend State budget basics.
- Know about the upgrade to SWIFT.
- Identify Security Roles assigned to SWIFT users.
- Know how to log in to SWIFT.

State Budget Basics

The State of Minnesota enacts state budgets according to a cycle of two fiscal years, known as a biennium.

A **fiscal year** is the 12-month budgeting period between one annual settlement of financial accounts and the next. The fiscal year for the State of Minnesota runs from July 1 to June 30.

- A fiscal year is abbreviated by “FY” plus the year in which it ends in June.
- For example, the fiscal year for July 1, 2017 through June 30, 2018 is FY 2018.

A **biennium** is a two-year budget cycle.

- A biennium is abbreviated by “FY” plus an even-numbered fiscal year followed by the next year.
- For example, the biennium for July 1, 2019 through June 30, 2021 is FY 2020-21 Biennium.
The **budget process** involves MMB, agencies, the governor, and the legislature.

This budget process consists of six steps.

1) MMB issues the budget process to agencies, and agencies create budget requests.
2) MMB compiles the budget requests from the agencies.
3) The governor reviews the budget requests and submits a budget proposal.
4) The legislature debates, modifies, and passes a budget bill.
5) The governor signs the budget bill into law.
6) Agencies receive their approved budgets and enter them in SWIFT.
SWIFT Upgrade

On July 1, 2011, SWIFT replaced the previous financial management system, known as the Minnesota Accounting and Procurement System (MAPS). State agencies use SWIFT to integrate business-process functionalities, including procurement, accounting, reporting, and supplier registration.

In December 2019, SWIFT underwent an upgrade, which included an updated fluid display as well as changes to navigation.

- Fluid display is an Oracle PeopleSoft functionality that recognizes the device used to access SWIFT. Fluid display adjusts the screen display to configure to desktop, tablet, or mobile device.
- Navigation changes in SWIFT replaced menus and submenus with tile-based navigation as well as a Navigation Bar (NavBar). (See Navigating SWIFT for more details.)

Security Roles

All State employees who are users of SWIFT have assigned security roles. These roles determine what business functions users have access to in SWIFT. Security roles are based on job duties (as determined by agencies).

For example, job duties for Accounts Receivable Specialists include processing accounts receivable credits and debits and initiating refunds; therefore, their business functions in SWIFT include access to creating statements, updating account items, and reviewing payments.

For questions or concerns about security roles, ask your manager to contact your Agency Security Administrator.

Log in to SWIFT

Users can log in to SWIFT using the Administrative Portal.

Note: After logging in to SWIFT, the SWIFT session will automatically time out if there has not been any activity for 20 minutes. All open browser windows running SWIFT will count toward this 20 minute timeout, so make sure to close any windows not needed. A warning message will display when you are about to be timed out.

Your session is about to expire.
As a security precaution, sessions end after 20 minutes of inactivity.
Click OK to continue your current session.

OK
Process Steps

- Step 1: Open the Administrative Portal.
- Step 2: Sign in to the Administrative Portal to access SWIFT.

**Step 1: Open the Administrative Portal.**

1. Open Internet Explorer.
   
   **Note:** Internet Explorer is the recommended browser to access SWIFT.

2. Open the Administrative Portal using the Administrative Portal URL: [mn.gov/adminportal](mn.gov/adminportal).

**Step 2: Sign in to the Administrative Portal to access SWIFT.**

1. The Administrative Portal login window will display. Input your Employee ID in the User ID field.
   
   **Note:** Employee ID is an eight-digit numeric identification number.

2. Input your password in the Password field.
   
   **Note:** Passwords must have at least eight characters, one number, and one special character. Strong passwords have at least three of the four types of characters:
   
   - At least one uppercase letter (A, B, C, etc.)
   - At least one lowercase letter (a, b, c, etc.)
   - At least one numbers (1, 2, 3, etc.)
   - At least one special character (=, -, $, %, etc.)

   For more details on passwords, see Statewide Systems Password Information.

3. Press the Sign In button.

   **Note:** To enable the screen reader, check mark the **Enable Screen Reader Mode** box prior to pressing the Sign In button.
Navigating SWIFT

Topic Overview

After logging in to SWIFT, My Homepage will display. However, if this page does not load correctly, you may need to clear the cache before you can continue using SWIFT.

After completing this topic, you should be able to:

- Clear the cache.
- View My Homepage.
- Understand the Home icon, Global/Elastic Search, Notifications, Actions List, and NavBar.
- Personalize SWIFT.
- Use tiles, navigation options, pages and left-menus, tabs, fields, drop-down lists and search options, wildcards, look up glasses, buttons, and links.
- Perform searches.
- Add and edit tiles to My Favorites.
- Understand how to read ChartFields.
- Update Effective Dates.

Clear the cache

If you experience difficulties trying to view data or access the login page in SWIFT, clearing your browsing history may help resolve these issues. This is commonly referred to as “clearing the cache.”

For process steps on how to clear the cache, see the Clear Browsing History and Cache Quick Reference Guide.
My Homepage

After logging in to SWIFT, My Homepage will display. This page includes the following top-bar icons.

**Home**: Select this icon to return to My Homepage anytime when navigating SWIFT.

---

**Global/Elastic Search**: Use this function to search for transactions across modules in SWIFT.

- Select the drop-down list to search in a specific module, or select “All” to search across all modules.
- Type your search criteria in the *Search* field, and press the *Search* (>>) button.
- *Example*: Look up a Supplier using Global/Elastic Search.
  - Select “All” from the drop-down list, type the Supplier ID in the *Search* field, and press *Search*.
  
  > On the *Search Results* page, select a *Category* (for example, *Suppliers*) to narrow the search results.

  > Press the *x* to remove or unselect the *Category*.
Notifications: Select the flag icon to review messages about Actions or Alerts in SWIFT.

- Actions are messages about approvals (if a voucher was denied for approval).
- Alerts list business transactions pending action in a user’s workflow (what work items to complete next).

Note: What Actions or Alerts appear in Notifications will depend on your security roles.

Actions List: Select this icon to access the following additional options:

- Personalize Homepage: Personalize My Homepage in SWIFT.
- My Preferences: Access options to change default settings in SWIFT.
- Sign Out: Sign out of SWIFT.

Add to My Favorites: When you open the Actions List on a page, you will also see Add to Favorites as an option. Select this option to add the page to My Favorites list—see Process Steps below.
Note: There are two ways to add a page to My Favorites. One way is from the Navigation Collection, which adds both the page and the left-menu to My Favorites. The other way is using the Navigator, which adds only the page to My Favorites (and not the left-menu). Both ways are explained below.

Process Steps to add a page to My Favorites (from the Navigation Collection)

1. After navigating to a page using the Navigation Collection, select the Actions List icon.
2. Select the Add to My Favorites option.
3. The Add to Favorites window will display. Press the Add button.
4. A confirmation message will display. Press OK.
5. Select the NavBar to access My Favorites—see below.
**NavBar**: Select the Navigation Bar to access *My Favorites, Recent Places,* and *Navigator.*

- **My Favorites**: Select to view and edit pages added to your favorites list.

- **Recent Places**: Select to view or backtrack to recently opened pages in SWIFT.
• **Navigator**: Select to navigate through all available menu options and pages in SWIFT.

![Navigator Diagram]

**Note**: The difference between the Navigator and tiles is that the Navigator lets you access all available menu options, including those not displayed as tiles on *My Homepage*.

**Example**: You can navigate to the *Regular Entry* page by scrolling through these NavBar menu options:

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>NavBar</td>
<td>Navigator, SWIFT, Accounts Payable, Vouchers, Add/Update, Regular Entry.</td>
</tr>
</tbody>
</table>

- Select the left-arrow **Back** button to navigate back to the previous menu option on the Navigator.
- Select the up-arrow **Back to Root** button to return to the original starting point on the Navigator.

![Navigation Option Diagram]

**Note**: You can also add a page to *My Favorites* from the **Navigator**, which adds pages to *My Favorites* without the left-menu showing—see **Process Steps** below.
Process Steps to add a page to My Favorites (using the Navigator)

1. After navigating to a page using the Navigator, select the Actions List icon.
2. Select the Add to My Favorites option.
3. The Add to Favorites window will display. Press the Add button.
4. A confirmation message will display. Press OK.
5. Select the NavBar to access My Favorites—see NavBar above.

Need Help?: If you need assistance while in a SWIFT module, press the Need Help? button, which you’ll find right below the NavBar.
The Quick Reference Guide (QRG) list will open by default, which provides links to QRGs for the module you’re working in currently. Select a guide to open it in another browser tab.

Scroll down and select the Common Utilities list to open links to reporting tools (Process Monitor, Query Viewer, Query Manager, and Report Manager). Select a reporting tool to open it in a new browser tab.
• Scroll down and select *SWIFT Help Desk* to open contact information for the SWIFT Help Desk. You may contact the SWIFT Help Desk, Monday through Friday, anytime between 7:30 a.m. and 4:00 p.m.

To close the QRG, Common Utilities, and SWIFT Help Desk lists, press the **Need Help?** button again.
Personalize SWIFT

To change how SWIFT displays navigation options on tiles, pages, and lines, you can personalize the default navigation settings by adding tiles to the NavBar, rearranging the tabbing order on pages, and adding or hiding fields on lines. In sum, you can personalize the three following features on SWIFT:

- Personalize NavBar.
- Personalize Pages.
- Personalize Lines.

Personalize NavBar.

1. Open the NavBar and select the Personalize NavBar icon.

2. The Personalize NavBar area will display. Press the Add Tile button.

3. The Add Tile area will display. Find a tile from the list below, or search for a tile using the Search field. Then select the tile to add it to the Personalize NavBar area.

4. To remove a tile from the NavBar, press the x icon next to the tile.

5. To save changes in the Personalize NavBar area, press the Done button.
Personalize Pages.

1. Before you can personalize pages, you will need to turn on the Customize Page Settings option within General Settings. To do so, open the Actions List, and select My Preferences.

2. The General Settings page will open. Select the Customize Page Settings option to activate it.

3. After activating the Customize Page Settings option, its setting will switch from No to Yes. To save this setting, select the Save button.
4. You will now be able to personalize pages on SWIFT. To personalize a page, navigate to the page and press the *Personalize Page* link toward the top-right.

5. The *Page Personalization* page will display, which lets you change the page’s tabbing order by pressing the radio buttons and numbered items. Check mark the *Save tabbing order personalized below* box.

6. For example, to rearrange the tabbing order on the *Regular Deposit* page, select one of the following radio buttons, and then select the numbered items below.

   - **Remove From Order**: Press this radio button, and then select the numbered items below to remove them from the tabbing order (removed items will be indicated by an X).

   - **Move Up In Order**: Press this radio button, and then select the numbered items below to move them up in the tabbing order (the number will change to an earlier sequence term).
• **Move Down In Order:** Press this radio button, and then select the numbered items below to move them down in the tabbing order (the number will change to a later sequence term).

7. To define a new order, press the **Clear Tabbing Order** button, and then select the numbered items below to create a new tabbing order (the item will change from an X to a sequence term).

   **Note:** Do not use the **Include in Tabbing Order** radio button. The **Include in Tabbing Order** radio button will be selected automatically after pressing the **Clear Tabbing Order** button.

8. Press the **Restore Default** button to restore the prior default settings for the tabbing order.

**Personalize Lines.**

1. To personalize lines on a page (for example, Distribution Lines on the **Regular Entry** page), navigate to the page, press the **Grid Action Menu** icon above the lines, and press the “Personalize” option.

2. Under the **Column Order** section, press the following buttons and boxes to personalize the Lines.
   - Select a tab or a column, and then press the up or down buttons to move that tab or column over in ascending or descending order on the line.
   - Check mark the “Hidden” box to ‘hide’ a tab or a column, which means it will not appear on the line.
   - Check mark the “Frozen” box to ‘freeze’ a tab or a column, which means it will appear on every one of the line’s tabs.
Hint: Tabs vs. Columns

- **Tabs**: Under the *Column Order* section, tabs are indicated by the word “Tab.”
  
  In this example, the tabs include Tab GL Chart, Tab Exchange Rate, Tab Statistics, and Tab Assets.

- **Columns**: All other options in the *Column Order* section without the word “Tab” are columns.

- **Note**: if you choose to move all columns from beneath one tab to another tab, that tab will disappear after pressing the **OK** button.

3. The *Sort Order* section is not used in Grid Customization. Only the *Column Order* section is used.
4. Press the **Preview** button to preview personalizations.

5. Press the **OK** button to save personalizations, or press the **Cancel** button to cancel them.

   **Note:** The *Copy Settings* link is not used.

6. After personalizing a line, it’s possible to view the line so that it displays all columns without tabs. To view all columns without tabs, select the **Show all columns** icon to the right of the tabs on a line.

7. To view the columns organized in tabs again, select the **Show tabs** icon.
Tiles

Tile icons are menu options to access applications in SWIFT.

- Starting on My Homepage, select a tile to open up menu options.
- For example, select the Accounting tile to open up menu options in the Accounting module.

Note: What tiles display will depend on what security roles you’ve been assigned.

Navigation Options

There are two tile-based navigation options that allow you to open pages in SWIFT.

- Navigation Collection: Drill down through tiles to open a page within a module.
- WorkCenter: Open a module’s WorkCenter, which is a one-stop shop with access to commonly used pages within a module.

Navigation Collection

To open a page within a module, drill down through the tiles until you arrive at the page. For example, open the Voucher Regular Entry page in the Accounts Payable module by selecting the following tiles.

1. From the Homepage, select the Accounting tile.
2. Select the Accounts Payable tile to open the Accounts Payable module.

3. Select the Vouchers tile.

The Voucher Regular Entry page displays on the right side, while folders to open other pages displays on the left-menu. (See Pages and left-menus for details about this layout.)

In the training guides, this type of navigation collection will be summarized as follows:

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Accounting, Accounts Payable, Vouchers.</td>
</tr>
<tr>
<td></td>
<td>The Voucher Regular Entry page will display by default.</td>
</tr>
</tbody>
</table>
WorkCenter

Most in a module can be done by navigating to its WorkCenter, which is a one-stop shop with access to several pages within a module, including frequently used pages, queries, and reports.

To open a WorkCenter and access several pages within a module, select the module’s WorkCenter tile.

For example, to open the AP WorkCenter, open the AP module and select the AP WorkCenter Tile.

1. From the Homepage, select the Accounting tile.

2. Select the Accounts Payable tile to open the Accounts Payable module.

3. Select the AP WorkCenter tile.
After opening the WorkCenter, the left-menu and the work area will display.

The left-menu allows you to select pages in folders, which are organized according to these categories:

- **My Work** (your work in progress)
- **Links** (commonly used AP pages)
- **Queries** (commonly used AP Queries)
- **Reports/Processes** (AP reporting)

You can open or close these categories and the folders below them by pressing the arrow icons.

4. Open a page by selecting it from the left-menu. After selecting a page, it will display in the work area to the right.

5. After opening a page, you can press the **Hide Menu** button to hide the left-menu.
Pages and left-menus

The left-menu displays on the left side of the screen, while pages display to the right.

- To hide or unhide the left-menu, select the double-bar icon.
- Press the down or up arrow icon to open or close a folder under the left-menu.
- Press the page name under a folder to open a SWIFT page in the work area to the right.

Tabs

Tabs appear on pages in SWIFT to display sets of information.

- Tabs are indicated by the tabular icon. When selected, the tab displays highlighted.
- For example, on the Voucher Regular Entry page, select the Find an Existing Value tab.
Fields

Fields appear on pages in SWIFT to enter information.

- Fields are indicated by rectangular boxes that let you type information inside.
- For example, on the Find Existing Value tab of the Voucher Regular Entry page is the Voucher ID field.

![Voucher Fields](image)

Drop-down lists and search options

Drop-down lists appear by fields in SWIFT to aid searches.

- Drop-down lists are indicated by the downward arrow icon.
- For example, by the Voucher ID field, select the drop-down list to display more options.

![Voucher ID Drop-down List](image)

From these drop-down lists, you can use the following search options:

- begins with type the beginning of what you are searching for
- contains type part of what you are searching for
- = type exactly what you are searching for

Wildcards

In search fields in SWIFT, you can also use wildcards to aid searches.

- A wildcard (%) is a symbol that acts as a placeholder for unknown information.
- For example, if you need to enter an eight-digit number but only know the first five digits, use a wildcard after the fifth digit.
Look up glass

The Look up glass appears by fields in SWIFT to let you search for information.

- The Look up glass is indicated by the magnifying glass icon.
- For example, select the Look up glass to open the Look Up Supplier ID search function.

Buttons

Buttons appears on pages in SWIFT to execute certain functions.

- Buttons are indicated by rectangular button icons.
- For example, in the Look Up Supplier ID search function, press the Search, Clear, or Cancel button.

Links

Select a link to view and toggle between additional options (for example, Basic and Advanced search options).

- Links are indicated by blue text (sometimes underlined).
- For example, in the Look Up Supplier ID search function, select the Basic Lookup link to display only Basic search options.
Perform Searches in SWIFT

Use the tiles, navigation options, pages and left-menus, tabs, fields, drop-down lists and search options, look up glass, buttons, and links to perform searches in SWIFT.

Process Steps

*Example: Search for a voucher.*

Search for a voucher in SWIFT that begins with the following digits: 0002.

- Step 1: Open to the *Voucher Regular Entry* page.
- Step 2: Search for vouchers that begin with 0002.
Step 1: Open to the Voucher Regular Entry page.

1. Navigate to the Voucher Regular Entry page.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Accounting, Accounts Payable, Vouchers. The Voucher Regular Entry page will display by default.</td>
</tr>
<tr>
<td>WorkCenter</td>
<td>Accounting, Accounts Payable, AP WorkCenter, left-menu, Links section, Regular Entry.</td>
</tr>
</tbody>
</table>

2. Select the Find an Existing Value tab.

Step 2: Search for vouchers that begin with 0002.

1. Select the drop-down arrow next to the Voucher ID field and select the “contains” search option.

2. Type “0002” into the Voucher ID field and then press the Search button.
3. Search Results will display with Voucher IDs that begin with 0002.
4. Select a voucher number under the Voucher ID column under Search Results to view voucher details.
5. You will be redirected the voucher information on the Voucher Regular Entry page of Accounts Payable.

   To return to the previous search results, press the Return to Search button toward the bottom left.

   To return to the My Homepage, select the Home icon toward the top right.
ChartFields

ChartFields are fields in SWIFT that provide the basic structure to segregate and categorize transactional and budget data, especially for processing and reporting purposes.

There are three classifications of ChartFields in SWIFT:

- **Statewide ChartFields** include Fund, Financial Department Identification (Fin DeptID), Appropriation ID and Account fields.
- **Agency Reporting ChartFields** include Statewide Cost, Agency Cost, SubAccount, Agency Cost 1 and Agency Cost 2 fields.
- **Project/Grant Reporting ChartFields** include PC Business Unit, Project, Activity, Source Type, Category and Sub-Category fields.
**Effective Date**

Effective Dates are dates when updates to information take effect in SWIFT.

- The purpose of an Effective Date is to track when updates to information must occur in SWIFT.
- Updates may include changes to Asset, Project, Grant, Customer, or Supplier information.

**Note**: Whenever you make updates to information in these modules, you must update the effective date using the *Effective Date* field—see Process Steps below for an example.

**Process Steps**

*Example: Update the Effective Date for an asset*

Update the Effective Date after making changes to the location of an asset.

- Step 1: Search for the asset.
- Step 2: Add a new row of information for the asset’s location.
- Step 3: Update the Effective Date.
- Step 4: Update the Location Code.

**Step 1: Search for the asset.**

1. Navigate to the *Asset Basic Information* page.
2. On the Asset Basic Information page, make sure the Find an Existing Value tab is selected.

3. Under the Search Criteria section, make sure “G1001” is in the Business Unit field.

4. Type the asset number in the Asset Identification field.

5. Press the Search button.

6. The asset information will display. Select the Location/Comments/Attributes tab.

    Notice that the number of rows will read “1 of 1.”
Step 2: Add a new row of information for the asset’s location.

1. Select the plus (+) button to add a new row to the Location section.

   ![Location section with new row added](image)

2. The Location section will now read “1 of 2” (indicating a new row has been added to the Location section), and a new date will show in the Effective Date field.

   ![Location section with effective date](image)

Step 3: Update the Effective Date.

1. To ensure the Effective Date field has the current date, select the calendar icon.

2. When the calendar displays, select the Current Date link.
Step 4: Update the Location Code.

1. Select the location code for the Department of Admin Human Resources by selecting the Look up glass for the Location field.

2. The Look Up Location window will display. Type “G02015%” in the Location Code field.

3. Press the Search button.

4. From the Search Results, select ADMIN/HUMAN RESOURCES.

5. Address information for ADMIN/HUMAN RESOURCES will now appear in the Address field.

    Press the Save button to save the updates to the location for the asset.
Lesson Summary

Having completed this lesson, you should now be able to:

- Understand background information about SWIFT, including:
  - State budget basics
  - The upgrade to SWIFT
  - Security roles for SWIFT
  - How to log in to SWIFT

- Navigate SWIFT and perform the following tasks:
  - Clear the cache.
  - View My Homepage.
  - Use the Home, Global/Elastic Search, Notifications, Actions List, and NavBar.
  - Personalize SWIFT.
  - Use tiles, navigation options, pages and left-menus, tabs, fields, drop-down lists and search options, wildcards, look up glasses, buttons and links.
  - Perform searches.
  - Add and edit tiles to My Favorites.
  - Read ChartFields.
  - Update Effective Dates.
Lesson 2: System Modules

Lesson Overview

SWIFT includes seventeen modules that organize procurement, accounting, and reporting functionalities.

After completing this lesson, you should be able to:

- Understand Procurement, Accounting, and Reporting functionalities.
- Recognize definitions and abbreviations of modules in SWIFT modules.
- Run inquiries, queries, and reports.

Procurement

Procurement includes six modules for purchasing goods/services.

- Procurement / EProcurement
- Purchasing / Purchase Orders
- Strategic Sourcing
- Supplier Contract
- Catalog Management
- Inventory

Procurement / EProcurement

Procurement: create and manage purchase orders for goods/services to establish an encumbrance.

- Purchase Order (PO): a document to authorize a purchase and establish an encumbrance.
- Encumbrance: an amount committed for spending on a purchase.

EProcurement (EPRO): create and manage requisitions.

- Requisition: a document to initiate purchase and establishes a pre-encumbrance.
- Pre-encumbrance: an amount expected to be spent on a purchase.

For more information on EPRO, see EPRO Training Guides.

Purchasing / Purchase Orders

Purchasing, or Purchase Orders (POs): issue documents to procure goods/services.

- Buyer (Administrator): an agency employee who creates the PO (for example, administers contracts, encumbers funds and enters POs in SWIFT).
- Receipt: a document that confirms the receipt of goods/services.
**Note:** POs refer to documentation for procuring goods/services; POs do not refer to the actual process of procuring goods/services (for example, soliciting bids, creating term contracts and acquisitions, etc.), which are carried out by the Office of State Procurement (OSP).

For more information on POs, see Purchase Orders Training Guides.

**Strategic Sourcing**

**Strategic Sourcing (SS):** solicit bids and award events, which result in contracts or purchase orders for goods/services provided by registered suppliers.

- **Supplier (Vendor):** the person/organization that supplies goods/services.
- **Event (Solicitation):** a document requesting a response from suppliers for goods/services.
- **Bid:** a response to an event submitted by suppliers.
- **Award:** choosing a supplier for goods/services.

For more information on SS, see Strategic Sourcing Training Guides.

**Supplier Contract**

**Supplier Contract (SC):** create and manage contracts for suppliers.

- **Contract:** an agreement between two or more parties to create an obligation, which is enforceable or otherwise recognizable by law.
- **Obligation:** when one party provides goods/services, and the other party pays for the obligation.

There are two types of contracts:

- **Commodity Contracts:** contracts for construction, goods, or non-technical/non-professional services.
- **Professional Contracts:** contracts for intellectual services, including consultation, analysis, evaluation, prediction, planning, programming or recommendation.

For more information on SCs, see Supplier Contract Training Guides.

**Catalog Management & Inventory**

**Catalog Management (CG):** manage data used to procure goods/services, including data to define items and manage codes for categories.

- **Item:** a product, material or service.
- **Category:** grouping similar goods/services for reporting and analysis, as represented by the UNSPSC.
- **United National Standard Products and Services Code (UNSPSC):** a universal coding system to classify products and services.
Inventory (IN): track and manage inventory requests.

For more information on CG and IN, see Supplier Contracts and Purchase Orders Training Guides.

Accounting

Accounting includes eleven modules in SWIFT for managing money, including General Ledgers (GLs) for agencies and Automated Clearing House (ACH) transactions and checks for suppliers.

- General Ledger
- Accounts Payable
- Billing
- Accounts Receivable
- Commitment Control
- Asset Management
- Grants Management
- Project Costing
- Cash Management
- Cost Allocation
- Supplier

General Ledger

General Ledger (GL): review an online repository for financial transactions in SWIFT, including data for business units and journal entries.

- Business Unit: an entity in SWIFT that typically corresponds to an agency (all agencies use MN001).

For more information on GL, see Accounts Payable and Accounts Receivable Training Guides.

Accounts Payable

Accounts Payable (AP): create and manage payments to suppliers using vouchers.

- Voucher: invoice data to request a payment.
- Invoice: a document received from the supplier requesting a payment.
- Matching: consistency between PO, receipt, and voucher.

For more information on AP, see Accounts Payable Training Guides.
Billing

Billing (Bi): create and manage bills to customers purchasing goods/services.

- **Billing invoice**: a bill that has been printed (equivalent to an Item in AR).
- **Pro Forma**: a copy of the invoice to proofread and correct for errors.

For more information on Bi, see [Billing Training Guides](#).

Accounts Receivable

Accounts Receivable (AR): manage payments to the State.

- **Item**: an invoice when it moves into Accounts Receivable status (equivalent to a Billing Invoice in Bi).
- **Payment Predictor**: the process that automatically applies payments and closes items.
- **Dunning Letter**: a notification to customer that an item is past due.

For more information on AR, see [Accounts Receivable Training Guides](#).

Commitment Control

Commitment Control (KK): manage transactions and run budget reports.

- **Budget Check**: verifying funds and their availability.
- **Budget Period**: the time segment to divide budgets (fiscal year for non-projects; original year for continuing appropriations).

For more information on KK, see [Budget Commitment Control Training Guides](#).

Asset Management

Asset Management (AM): track state-owned assets.

- **Assets**: tangible and intangible items owned or leased by the State, including capital, non-capital and sensitive assets.

For more information on AM and assets, see [Asset Management Training Guides](#).

Grants Management

Grants Management (GM): track grants to the State.

- **Sponsor**: an entity providing grant(s) or funding for project(s).
- **Proposal**: details about the sponsor and project funded by a grant.

For more information on GM, see [Grants (Incoming) Training Guides](#).
Project Costing

**Project Costing (PC):** track and report costs for projects.

- **Project ID:** the unique number assigned to identify a project.
- **Project Status:** the status that determines if a project is still active.
- **Control Dates:** the start date and the end date for a project.

For more information on PC, see [Project Costing Training Guides](#).

Cash Management and Cost Allocation

**Cash Management (CM):** review banking pages, reconcile financial transactions in bilateral netting, and run reports and queries.

**Cost Allocation (CA):** distribute amounts to business units, projects, etc.

Supplier

**Supplier (SUP):** manage supplier information required to purchase and pay for goods/services.

- **Supplier (Vendor):** the person or organization that supplies goods/services.
- **Supplier Portal:** the system suppliers use to manage their information and interactions with the State, including purchasing, bidding, and payments.

For more information on SUP, see [Supplier Training Guides](#).
Reporting

Reporting Overview

There are three methods to look up procurement and financial information in SWIFT.

- **Inquiries**: Search for data associated with fields on a page (for example, search for a particular voucher on the voucher page).
- **Queries**: Perform a customized search for data within a module (for example, search for DBA names in the Supplier module).
- **Reports**: Review processing details on individual transactions or batch processes (for example, review the budget checking status of vouchers).

Inquiries

Inquiries, which let you search for data associated with fields on a page, are located in modules.

- For example, use the Purchase Order Inquiry to search for data from the *Purchase Order* page (Add/Update POs)—see Process Steps below for an example.

Process Steps

**Example: Run an Inquiry for a Purchase Order**

- Step 1: Navigate to the Inquiry in the PO module and enter search criteria.
- Step 2: View a search result from the Inquiry, or run a new Inquiry.

Step 1: Navigate to the Inquiry in the PO module and enter search criteria.

1. Navigate to the *Purchase Order Inquiry* page.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Navigation Collection</strong></td>
<td>Procurement, Purchasing, Purchase Order, left-menu, PO Inquiry, Purchase Orders.</td>
</tr>
<tr>
<td><strong>WorkCenter</strong></td>
<td>Procurement, Purchasing, Buyer WorkCenter, left-menu, Main tab, Links section, Review Purchase Orders.</td>
</tr>
</tbody>
</table>

2. When the *Purchase Order Inquiry* page displays, make sure the *Find an Existing Value* tab is selected.

3. Enter the relevant data in fields under the *Search Criteria* section to search for a PO, such as PO ID, Origin, Contract ID, etc.

4. Press the *Search* button. A list of search results will display below the *Search Results* section.
Step 2: View a search result from the Inquiry, or run a new Inquiry.

1. From the list of **Search Results**, select the PO. The **Purchase Order Inquiry** page will display.
2. To run a new Inquiry, press the **Return to Search** button.
### Purchase Order Inquiry

**Purchase Order**

- **Business Unit**: G1001
- **PO ID**: [Redacted]
- **Change Order**: 2

**Header**
- **PO Date**: 03/13/2015
- **Supplier Name**: [Redacted]
- **Supplier ID**: [Redacted]
- **Bayer Reference**: [Redacted]
- **Billing Location**: [Redacted]

**Date of Purchase Order**: June 2015

**Type of Document**: Labo/MMB Negotiation

**Document Status**: Received

**Document Name**: Blanket Purchase Agreement

**Agency Name**: Ann Male

**Amount Summary**
- **Merchandise**: 10,961.31 USD
- **Freight/Fax/Misc.**: 0.00 USD
- **Total**: 10,961.31 USD
- **Encumbrance Balance**: 0.00 USD

**Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Item ID</th>
<th>Item Description</th>
<th>Category</th>
<th>PO Qty</th>
<th>UOM</th>
<th>Merchandise Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>90111500</td>
<td>Sleeping Rooms - G10390000-Labo</td>
<td></td>
<td>1.0000</td>
<td>LO</td>
<td>3,772.83 USD</td>
</tr>
<tr>
<td>2</td>
<td>90111500</td>
<td>Sleeping Rooms - G1036101-SEG</td>
<td></td>
<td>1.0000</td>
<td>LO</td>
<td>673.62 USD</td>
</tr>
<tr>
<td>3</td>
<td>90111500</td>
<td>Sleeping Rooms - G10370000-EHR</td>
<td></td>
<td>1.0000</td>
<td>LO</td>
<td>2,384.62 USD</td>
</tr>
<tr>
<td>4</td>
<td>90111600</td>
<td>Meeting Rooms - G10380000-Labor</td>
<td></td>
<td>1.0000</td>
<td>LO</td>
<td>2,893.92 USD</td>
</tr>
<tr>
<td>5</td>
<td>90111600</td>
<td>Meeting Rooms - G1036101-SEGI</td>
<td></td>
<td>1.0000</td>
<td>LO</td>
<td>565.16 USD</td>
</tr>
<tr>
<td>6</td>
<td>90111600</td>
<td>Meeting Rooms - G10370000-EHR</td>
<td></td>
<td>1.0000</td>
<td>LO</td>
<td>565.16 USD</td>
</tr>
</tbody>
</table>
Queries

Queries let you perform customized searches for information in a particular module. For example, you can run a query to look up supplier names and numbers in the Supplier module. Queries are located under the Reporting Tools Menu.

Note on Query Naming Conventions:

To run a query in SWIFT, you will need to know the naming convention for the query. Naming conventions for queries use the following abbreviations:

- **M** stands for Minnesota. All naming conventions begin with this letter.
- **XX** or **XXX** is the two- or three-letter abbreviation of a SWIFT module (for example, **AP** = Accounts Payable, **VND** = Vendor module)
- **GBL** stands for global.
- Use the underscore symbol (_) between these parts of the query.

Process Steps

To run a Query, complete the following steps:

- **Step 1:** Open a query using the Query Viewer.
- **Step 2:** Run a query and view the search results.

**Step 1: Use the Navigator (in NavBar) to open the Query Viewer.**

1. Navigate to the Query Viewer page.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>NavBar</td>
<td>Navigator, SWIFT, Reporting Tools, Query, Query Viewer.</td>
</tr>
</tbody>
</table>

2. The Query Viewer page will display. From the Search By field, select the “Query Name” option.

3. In the begins with field, enter the naming convention for the query you want to run.

   Naming conventions for queries begin with “**M_XX**” to abbreviate the following information:
   - **M** = Minnesota – always start with this letter
   - **XX** = abbreviation of SWIFT module (for example, **AP** = Accounts Payable, **VND** = Vendor module)

   **Note:** If you only type the “**M_XX**” abbreviation, SWIFT will open all the queries in that module.

4. Press the Search button. A list of Search Results for queries will display below the Query section.

   The Search Results show the queries available for a particular module.
5. To open a particular query, select either the *HTML* link (to display the search results in a browser tab or window) or the *Excel* link (to display the search results in an Excel spreadsheet).

![Query Viewer](image)

**Step 2: Run a query and view the search results.**

1. The query window will open. In the open field, type the search criteria.
   
   **Hint:** You may use the *wildcard* symbol (%) as a placeholder for unknown information.

2. Press the *View Results* button. A list of search results will display.

   **Note:** Query results will display in another window if you selected *HTML*, or they will open in an Excel spreadsheet if you selected *Excel*. Opening the query in Excel allows you to sort and filter the query results by column.
Reports

Reports compile data using the Reports submenu.

Reports are located within modules and include two options for viewing financial information:

- Process Monitor
- Report Manager

Process Steps

View Reports using the Process Monitor

Process Monitor lets you view processing and status details for individual transactions or batch processes (multiple transactions).

Note: Batch processes may run at various times during the day or overnight according to a predefined schedule (for example, budget check, matching a voucher, vendor approval, etc.)

To use the Process Monitor, complete the following steps:

- Step 1: Open the Process Monitor.
- Step 2: Enter search criteria in the Process Monitor.
- Step 3: View the search results to determine the status of submitted processes.

Step 1: Open the Process Monitor.

1. Navigate to the Process Monitor.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
</table>

2. The Process Monitor page will display. Make sure the Process List tab is selected.
Step 2: Enter search criteria in the Process Monitor.

1. In the User ID field, make sure your Employee ID number is entered.
2. Use the following optional fields to narrow your search for submitted work.
   - Leave the first Type field blank.
   - In the next field three fields, input the following information:
     - Select either “Last” or “Date Range.”
     - If “Last” was selected, type a number; if “Date Range” was selected, input a starting date.
     - If “Last” was selected, select a time period; if “Date Range” was selected, input an ending date.
   - Leave all other fields blank.
3. Press the Refresh button to perform your search.

Step 3: View the search results to determine the status of submitted processes.

1. Look for the search results under the Process List section. Submitted processes that completed successfully will say “Success” under the Run Status column.
2. Submitted processes not yet completed will have a message other than “Success” under Run Status (for example, “Queued”). To research why the process has not been completed, select the Details link.

3. The Process Details screen will display showing details about the processing. Select the Message Log link to view any messages that explain the processing details.

4. The Message Log screen will display showing any messages that explain the processing details. Press the Return button. To view further details, press the Explain button.

5. To return to the Process Details screen, press the Return button.
Run the Report Manager

Report Manager lets you run reports about work items in SWIFT.

- For example, view a Purchase Order.

To run a report, complete the following steps:

- Step 1: Use the Navigator (in the NavBar) to open the Report Manager.
- Step 2: Enter search criteria in the Report Manager.
- Step 3: View the search results to open a report.

Step 1: Use the Navigator (in NavBar) to open the Report Manager.

1. Navigate to the Report Manager.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>NavBar</td>
<td>Navigator, SWIFT, Reporting Tools, Report Manager.</td>
</tr>
</tbody>
</table>

2. The Report Manager page will display. Select the Administration tab.

Step 2: Enter search criteria in the Report Manager.

1. Type your Employee ID in the User ID field.
2. Use the following optional fields to narrow your search for reports.
   - Leave the first Type field blank.
   - In the next field three fields, input the following information:
     - Select the drop-down option to select either “Last” or “Date Range.”
     - If Last was selected, type a number; if “Date Range” was selected, input a starting date.
     - If “Last” was selected, select a time period (for example, hours); if “Date Range” was selected, select an ending date.
   - Leave all remaining fields blank.
3. Press the Refresh button.
Step 2: View the search results to open a report.

1. A report will appear listed under the Report List section of Administration tab.

2. Select the Description link to open the report.

   Example of “Purchase Order” report
Additional Reporting Options

Additional Reporting Options Overview

There are two additional reporting options used by the State of Minnesota:

- SWIFT Data Warehouse
- Information Access Warehouse

SWIFT Data Warehouse

Data from SWIFT are loaded into the SWIFT Data Warehouse.

You can search for data in the SWIFT Data Warehouse using the Oracle Business Intelligence Enterprise Edition (OBIEE) tool, which organizes data in SWIFT DATA Warehouse according to Subject Areas.

For more information on searching SWIFT data using OBIEE, visit SWIFT Data Warehouse webpage.

Information Access (IA) Warehouse

The Information Access (IA) Warehouse was the old reporting tool prior to SWIFT Data Warehouse.

IA Warehouse created Crystal Reports, which were interim reports of data prior to being available on OBIEE.

Crystal Reports have been used by Human Resources but are not available in SWIFT.

Lesson Summary

Having completed this lesson, you should now be able to:

- Have a basic understanding of Procurement, Accounting, and Reporting functionalities in SWIFT.
- Recall the definitions and abbreviations for modules in SWIFT.
- Run inquiries, queries, and reports, and know about the OBIEE tool and the IA Warehouse.
Lesson 3: SWIFT Training Resources

Lesson Overview

For further assistance with SWIFT, there are a variety of training resources available for State employees.

After completing this lesson, you should be able to:

- Access training resources.
- Contact the Help Desk.
- Receive Weekly Updates.

Training

Topic Overview

SWIFT training resources include both classes and user guides.

After completing this topic, you should be able to:

- Sign up for classes to learn SWIFT modules.

Classes

SWIFT classes are available to State of Minnesota employees. These classes include classrooms, web-based training and webinars. Employees can sign up for a class using Enterprise Learning Management (ELM), which is available on the State of Minnesota Self Service website.

Process Steps

Employees can sign up for a class in the ELM using the State of Minnesota Self Service website.

- Step 1: Sign into Employee Self Service and navigate to ELM.
- Step 2: Enroll in a class.
Step 1: Sign into Employee Self Service and navigate to ELM.

1. Sign in to Employee Self Service: enter your User ID (Employee ID) and Password, and press Sign In.

2. Select the ELM tile to open Enterprise Learning Management.
Step 2: Enroll in a class.

1. Select the *Find Learning* link.

![Find Learning](image)

2. The *Find Learning* page will display.

3. Search for classes to enroll in, such as classrooms, web-based training and/or webinars.

4. Press the *Enroll* button for a particular class to enroll in that class.

5. You will receive an email confirmation from ELM.Notification@state.mn.us stating that you have been enrolled in the class.
Training Guides

The MMB website provides two types of Training Guides for employees.

- **User Guides** are comprehensive procedures for entire modules in SWIFT.
- **Quick Reference Guides (QRGs)** are brief procedures for common tasks in a particular SWIFT module.

**Process Steps to access User Guides and Quick Reference Guides**

You can access all User Guides and/or Quick Reference Guides from the Training Guides page.

You can also navigate to these training guides from the MMB website by following these steps:

- Step 1: Navigate to the *Training Guides* page on the MMB website.
- Step 2: Find the User Guide or the Quick Reference Guide you want to review.

**Step 1: Navigate to the *Training Guides* page on the MMB website.**

1. Access the [MMB website](#).
2. From the MMB website, hover over the following menu options to navigate to the *Training Guides and Resources* page.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Accounting, SWIFT, Training and Support, Training Guides.</td>
</tr>
</tbody>
</table>
Step 2: Find the User Guide or Quick Reference Guide you want to review.

1. When the *Training Guides and Resources* page displays, select a module under SWIFT Basics, Accounting, or Procurement.

2. The module page will list all available User Guides and/or Quick Reference Guides. Select a training guide to open it in a new browser tab or window.
Training Videos

The MMB website also provides training videos for employees.

Process Steps to access Training Videos

You can access all Training Videos from the Training Videos page.

You can also navigate to these training videos from the MMB website by following these steps:

1. Access the MMB website.
2. From the MMB website, hover over the following menu options to navigate to the Training Videos page.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Accounting, SWIFT, Training and Support, Training Videos.</td>
</tr>
</tbody>
</table>

3. Select a module to open all training videos listed under that module (for example, SWIFT Basics).
Help Desk Support

Topic Overview

The SWIFT Help Desk is available if you need assistance with any SWIFT module.

After completing this topic, you should be able to:

- Contact the SWIFT Help Desk.
- Know about SWIFT Vendor Resources.

Help Desk Hours and Contact Information

The SWIFT Help Desk is available from 7:30 a.m. to 4:00 p.m., Monday through Friday.

You may contact the SWIFT Help Desk via phone or email.

- Phone: 651-201-8100 (Option 2)
- Email: swifthelpdesk.mmb@state.mn.us

Note: The Help Desk is closed on holidays.

Please see the SWIFT Help Desk webpage for more details.

Vendor Help

Vendors who have questions will need to contact a different help line, depending on the question.

- See the SWIFT Vendor Resources webpage for details.

Weekly Updates

Topic Overview

Users of SWIFT need to be aware of any past, current, or future updates to the Financial Management System. The SWIFT Newsletter is emailed out on a weekly basis to update users about SWIFT.

After completing this topic, you should be able to:

- Read about SWIFT updates online.
- Subscribe to the SWIFT Newsletter.
- Sign up for Weekly Updates about SWIFT.
Overview

You can read about weekly updates to SWIFT online by looking at the SWIFT Update webpage.

You can read about past updates to SWIFT by looking at the Previous Updates webpage.

You can receive email notifications about Weekly Updates to SWIFT by subscribing to the SWIFT Newsletter.

Process Steps

To sign up for Weekly Updates, subscribe to the SWIFT Newsletter.

- Step 1: Navigate to the Email Lists page on the MMB website.
- Step 2: Subscribe to the SWIFT Newsletter.

Step 1: Navigate to the Email Lists page on the MMB website.

1. Access the MMB website.
2. From the MMB website, hover over the following options to navigate to the Email Lists page.

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>Accounting, SWIFT, General Information, Email Lists.</td>
</tr>
</tbody>
</table>
Step 2: Subscribe to the SWIFT Newsletter.

1. When the *Email Lists* page displays, select the *SWIFT Newsletter* link.

   ![Email Lists (GovDelivery)](image)

   - Accounting Coordinators
   - Accounts Receivable (Workgroup Coordinators)
   - HR Business Continuity
   - HR Director Descriptions
   - HR – Directors (Cabinet-Level Agencies)
   - Human Resources Director Partnership
   - LR Alertcast Contacts [Statewide]
   - Recruiting Solutions/State job application system
   - SEMA4 HR users
   - SEMA4 Payroll
   - SEMA4 Systems Status Notifications
   - State HR (All)
   - State Legislators
   - Statewide Recruitment / Workforce Diversity
   - SWIFT Data Warehouse
   - SWIFT ERS Systems Status Notifications
   - **SWIFT Newsletter**
   - Workforce community

2. When the *Email Subscriptions* page displays, enter your email address, and press **Submit**.

   ![Email Subscriptions](image)
Lesson Summary

Having completed this lesson, you should now be able to:

• Access training, including classes and User Guides.
• Contact SWIFT Help Desk Support.
• Sign up for and receive Weekly Updates.

Course Summary

Having completed this user guide, you now understand the following lessons:

• The Financial Management System, including background information and how to navigate SWIFT.
• System Modules in SWIFT for Procurement, Accounting, and Reporting functionalities.
• SWIFT Resources, including Training, Help Desk Support, and Weekly Updates.