



Introduction to SWIFT Navigation

User Guide

Updated February 20, 2024

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Overview of SWIFT

SWIFT (StateWide Integrated Financial Tools) is the PeopleSoft based online financial, procurement, and reporting system used by the State of Minnesota.

It is used by over 45 State agencies, boards, and other partners who manage, report, and use State financial and procurement data.

State agencies that support SWIFT

- Minnesota Management and Budget (MMB)
- Minnesota Department of Administration, Office of State Procurement (OSP)
- Minnesota IT Services (MN.IT)

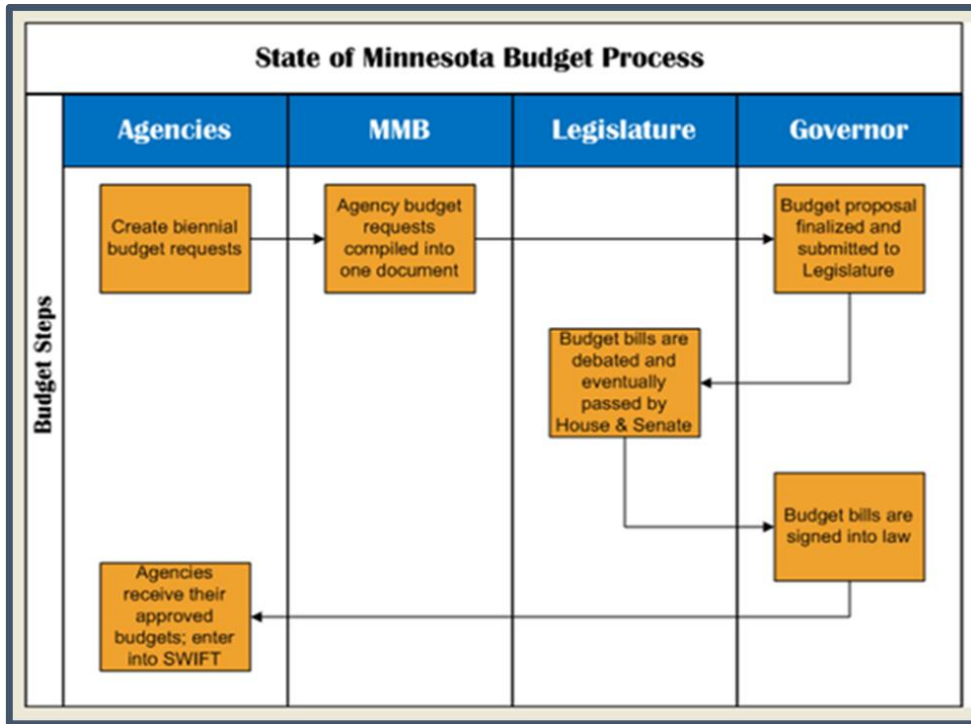
State Budget Basics

The State of Minnesota enacts budgets for a two-year cycle (a biennium), beginning on July 1 of each odd-numbered year. By law, the Governor must propose a biennial budget in January of odd numbered years. For example, the Fiscal Year 2024-25 Biennium is July 1, 2023, through June 30, 2025.

The Biennial Budget Cycle

Once enacted by the legislature, the budget can be modified in the "off-year" legislative session. As a result of State forecasts and other changes, it is common for the Legislature to enact annual revisions to the State's biennial budget. These revisions are referred to as supplemental budgets. The State's constitution requires Minnesota to maintain a balanced budget by the end of the budget cycle. The budget process involves MMB, State agencies, the governor, and the Minnesota legislature. Here are the phases.

1. MMB issues the budget process to agencies. Agencies create their budget requests.
2. MMB compiles the budget requests from the agencies and delivers to the Governor's Office.
3. The governor reviews the budget requests and submits a budget proposal to the Legislature.
4. The Legislature debates, modifies, and passes budget bills (appropriations).
5. The governor signs the budget bills into law.
6. Agencies receive their approved budgets. MMB loads Appropriations into SWIFT.
7. Agencies enter expense, revenue, and transfer budget journals before they can spend or receive money.



Fiscal Year

A fiscal year is the 12-month accounting 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.
- The Accounting Date determines the fiscal year transactions are reported.
- Once MMB completes financial year-end close which is the hard close in August, it locks down the transactions for the previous accounting fiscal year.

For example, the Fiscal Year for July 1, 2023, through June 30, 2024, is FY 2024.

Budget Period

Budget Period represents the period that money is legally authorized for spending by the legislature. Budget periods start on July 1st and end on June 30th of each year. For continuing appropriations, it represents the original year of funding. Agencies track transactions tied to budgets.

This field is only used in the Commitment Control module. In other modules this field is referred to as “Budget Year.” Agencies manage budgets according to budget period.

For example, the Budget Period of 2024 is 7/1/2023 to 6/30/2024.

Budget Period versus Accounting Fiscal Year

SWIFT uses the Budget Period or Budget Date fields to distinguish between the Budget Period and the accounting Fiscal Year. This allows accounting transactions to be posted to a different accounting Fiscal Year and Budget Period.

Important Dates

It is critical to understand how date fields impact SWIFT transactions.

Effective Date

The Effective Date is a method of dating information in SWIFT. Users can predate information to add historical data or postdate information in order to enter it before it goes into effect. An *Effective Date* always must be greater than the previous Effective Date.

Accounting Date

The Accounting Date determines the accounting Fiscal Year the transaction will post to the General Ledger.

- The Accounting Date defaults to the current date. In some instances, it may be necessary to change the accounting date to facilitate accurate fiscal year end reporting.
- A user can only select an Accounting Date that falls within an open period in the ledger to which they are posting.

Defining Dates in SWIFT Quick Reference Guide

For more information about the SWIFT modules that have important and/or required dates, view the [Defining Dates in SWIFT](#) quick reference guide.

Hard and Soft Close

The Soft Close Period is July 1 through August, the Hard Close Date.

This timeframe is used to prepare for the hard close of accounting activity as it relates to the prior fiscal year since there are two fiscal years open. Agencies need to be aware of dates to make sure transactions are recorded in the correct accounting fiscal year and budget fiscal year, which may not necessarily be the same.

Hard close occurs in August of every year for the previous fiscal year.

All the transactions for the previous fiscal year have been processed and there is no more financial activity allowed for it. Agencies can no longer enter an Accounting Date prior to July 1 of the current fiscal year for the previous fiscal year.

SWIFT Requirements and Processes

Security

Security Roles

All State employees who are users of SWIFT have assigned SWIFT security roles. Your agency determines your roles.

- **Roles based on functions**
Some security roles determine what business functions a user can access on SWIFT. For example, some roles allow you to create and manage transactions in a module. Inquiry roles allows you to see the transaction but not update it.
- **Roles based on job duties**
Some security roles are based on common job duties. For example, an Accounts Payable Agency Clerk enters and maintains vouchers in the Accounts Payable module.
- **SWIFT queries and reports**
Some roles allow a user to get the data to run a query or report in SWIFT.

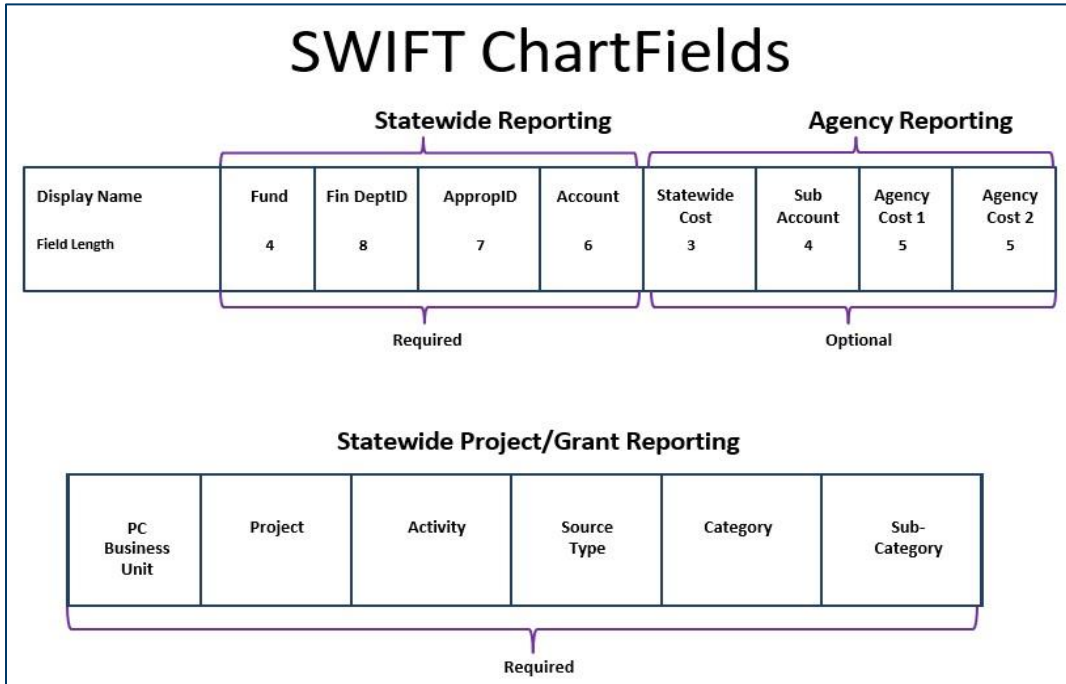
Information about Security roles

- MMB's SWIFT [Security](#) page has more information. You can find the role descriptions and the forms to request these roles with approval from your agency.
- For questions or concerns about security roles, ask your manager to contact your Agency Security Administrator.

ChartFields

ChartFields provide the basic structure to segregate and categorize transactional and budget data. Typically, you enter ChartField information in SWIFT transactions that impact budget.

- **Statewide Reporting**
SWIFT requires these ChartFields for all transactions.
- **Agency Reporting**
Your agency or MMB may require additional ChartFields in certain circumstances.
- **Project/Grant Reporting**
Some transactions such as State or Federal grants require other ChartFields.



SWIFT Required ChartFields.

ChartField Name	Description
*Account	The Account ChartField classifies the nature of a transaction such as "cash" and "supplies." The values in this field determine whether it is an asset, liability, equity, revenue or expenditure.
*AppropID	An Appropriation is an amount of money made available by the legislature for use by an agency to perform a particular purpose. An Appropriation legally authorizes spending or the collection of receipts as specified in session laws or state statutes. The Appropriation ID is a 7-character alphanumeric identifier. It indicates a single appropriation account that controls the total amount of an agency's expenditures.
*Fin DeptID	Financial Department Identifier Fin DeptID represents the organizational function to which expenditures and other activities must be applied. The department structure should represent the organizational structure of an agency or department. Combined with other ChartField values, Fin DeptIDs form the basis for department budgets that track revenues and expenditures.
*Fund	Funds are self-balancing sets of accounting records that are segregated for the purpose of carrying on specific activities or attaining certain objectives in accordance with specific regulations, restrictions, or limitations. The Fund ChartField will be required for all transactions. All Funds will be required to establish budgetary levels for commitment control purposes.

IMPORTANT: Contact your supervisor or agency budget officer to make sure to enter the correct ChartFields on a SWIFT transaction.

- For more information about ChartFields, review the SWIFT [Financials Support](#) page.
- For more information about Category Codes, review the [Category Codes Overview](#) quick reference guide.

Budget Checking

Budget checking is the process of validating the transaction against the budget. It can be reached with various requests from various modules. Any transactions that do not match a predefined budget will fail budget checking and will require the user to either fix the transaction or request a budget change.

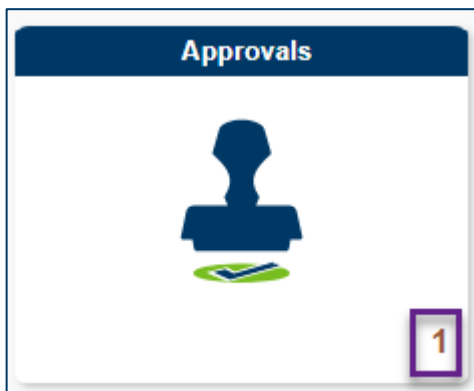
Approvals

Many transactions in SWIFT require approval before they can process to the next step of the workflow.

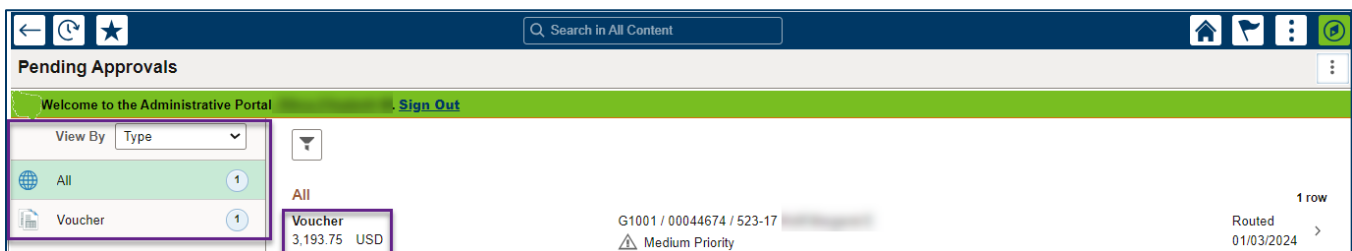
Steps for approvers to review and approve transactions

1. Approvers review the Approval tile.

Approvers can see that they have transactions to review and approve on the **Approvals** tile on the Administrative Portal.

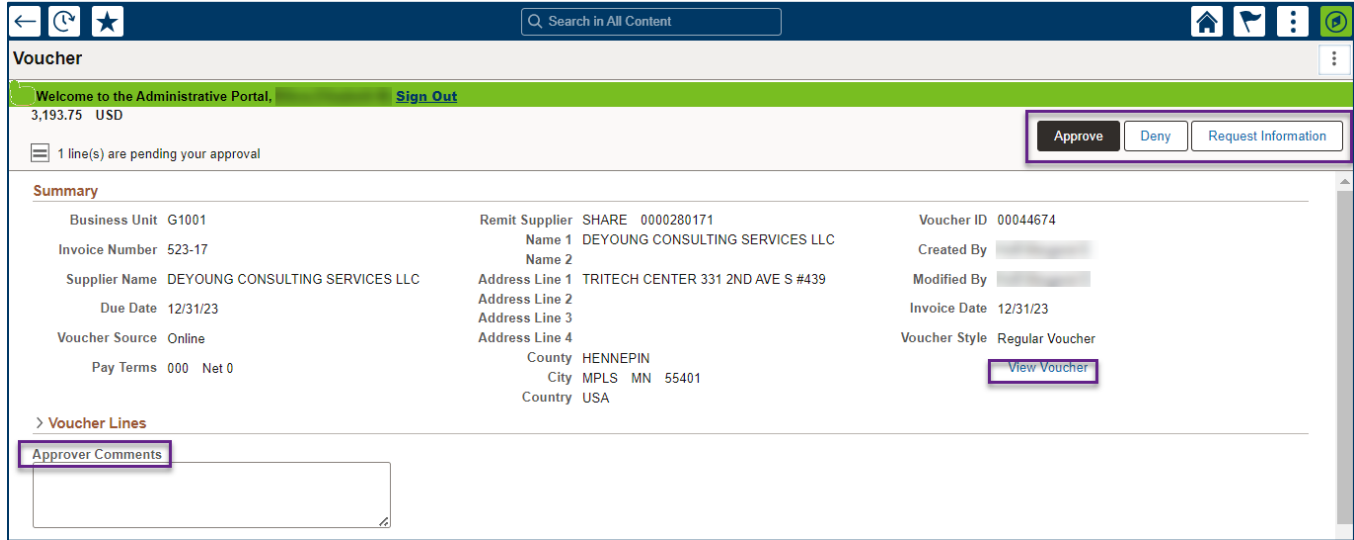


2. When they select their Approval tile, SWIFT brings them to the Pending Approvals page.



- The left menu summarizes the pending approvals by module.
 - The main section shows individual transactions that require review and approval. Approvers select a transaction to approve in either section.
3. SWIFT opens the Approval page. Approvers review the transaction.
- There is a link to the transaction or document.

- Approvers can see who else is in the Approval Chain.
- Depending on the transaction, they can select the **Approve** or **Deny** buttons. Some modules also offer a **Pushback** or **Request Information** button.



4. The transaction progresses in the workflow.

Once an individual approver reviews and approves the transaction, SWIFT routes it to the next approver as needed until the transaction is approved.

Batch Processing

SWIFT automatically processes many transactions. Batch processing is the processing of transactions in a group or batch. No user interaction is required once batch processing is underway.

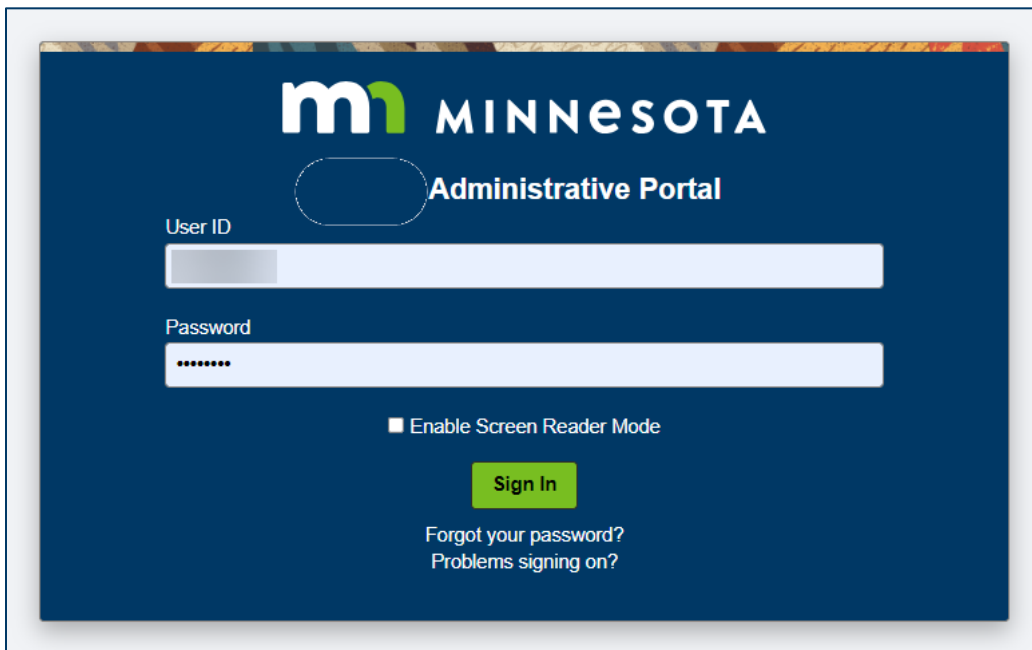
- Batch processes run in the background of SWIFT either on a predefined schedule or overnight.
- Depending on the module and process, you can still run on-demand processing, such as a budget check on an individual purchase order.
- Some common batch jobs include budget checking and matching on vouchers, budget checking on purchase orders, Accounts Receivable updates, supplier registration and change requests, and General Ledger postings.

Navigating SWIFT

Sign In to SWIFT

Access SWIFT through the Administrative Portal

- You can use Microsoft Edge, Google Chrome, or Mozilla Firefox browser to access the Administrative Portal.
- Sign in the Administrative Portal. (mn.gov/adminportal)
- Enter your User ID, which is your employee identification. It is your eight-digit numeric identification number.
- Enter your password and select the Sign In button.



Enable Screen Reader Mode

If you check this box and then select the **Sign In** button, SWIFT displays a message inquiring if you wish to save this setting. If you select “Yes,” it will add screen reader functionality to use navigate through SWIFT.

Forgot your password?

This link brings you to a password retrieval page. It asks you to enter your User ID to authenticate who you are.

Problems signing on?

If you select this link, you will see the SWIFT Help Desk page with the phone number and email contact.

Passwords

Password requirements and attributes

- Must be at least eight characters in length
- Must include at least one number
- Must include at least one special character
- Are case sensitive, cannot be reused, expires after 60 days

Strong passwords have at least three of the following four types of characters

- At least one uppercase letter, A - Z
- At least one lowercase letter, a - z
- At least one numbers, 0-9
- At least one special character, !@#\$%^&*()_+={[}]|\:;'"<,>.?/

Password examples

- Strong Password: MyC@tIs#1
- Weak Password: Abc123456

IMPORTANT. If your browser asks you if you'd like to save your password, always select "No."

NOTE: You can also change your password in the Actions menu using My Preferences.

For more details on passwords, see the [Statewide Systems Password Information](#) page.

Trouble Shooting Errors

Clear Cache or Deleting Browsing History

If you experience difficulties trying to view data or access the **Sign In** page for SWIFT, clearing your browsing history may help resolve these issues. This is commonly referred to as "clearing cache," which means deleting browsing history.

Clear the cache on your Internet browser when:

- SWIFT pages fail to load, do not load correctly, or display the "404 Error" message.
- There are financial management system upgrades or issues.
- MN.IT or the SWIFT Help Desk recommends refreshing your Internet browser.

See the [Clear Browsing History and Cache](#) quick reference guide for more information.

IMPORTANT! Make sure to follow all the steps listed to clear the cache depending on which Internet browser you use.

Common SWIFT System Messages

- **Recycled Status**
This error message occurs on the distribution line when the budget check did not process. This happens when the funding string isn't complete or hasn't been entered.

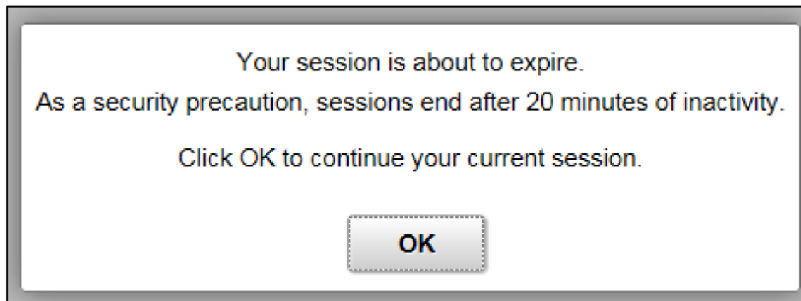
- **Page Inconsistent with Data**
This error message occurs when SWIFT sees two different versions. You may need to clear cache, sign out of SWIFT, and sign back in.
- **Blocked Status**

Occasionally, when running a manual process, users may see that a process they have submitted to run is in *Blocked* status. Blocked status means that SWIFT is temporarily preventing the job from running, holding it until another job instance finishes. Blocked process instances are rare. They only affect a small handful of jobs that are limited to a specific number of concurrent instances.

Select	Instance	Seq.	Process Type	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	38131483		Application Engine	02/16/2022 6:30:00AM CST	Blocked	N/A	Details

- **Session About To Expire**

SWIFT may send a warning message that it will automatically time out if there has not been activity for 20 minutes. It may happen if you open more than one page in SWIFT. To keep the session open, select **OK** to and close additional SWIFT pages as needed.

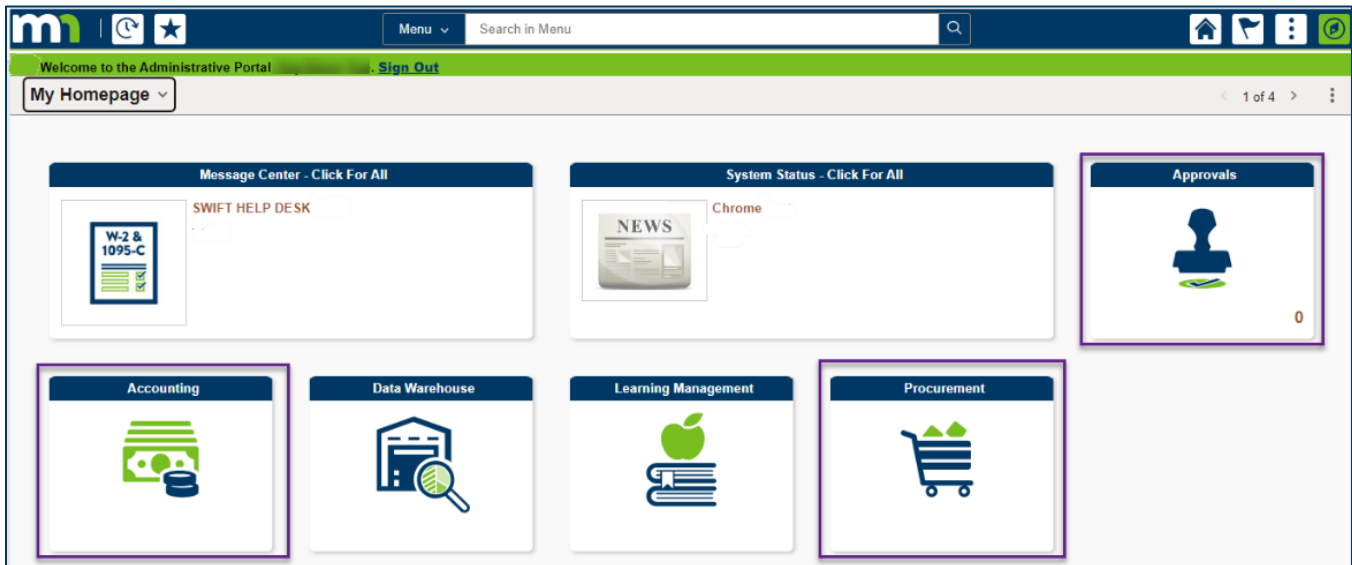


Still Having Problems?

If you continue to have trouble accessing SWIFT or a SWIFT page and you correctly cleared your browser's cache, **contact** the SWIFT Help Desk.

- Email: SWIFTHelpDesk.MMB@state.mn.us
- Phone: 651-201-8100, option 2

My Homepage

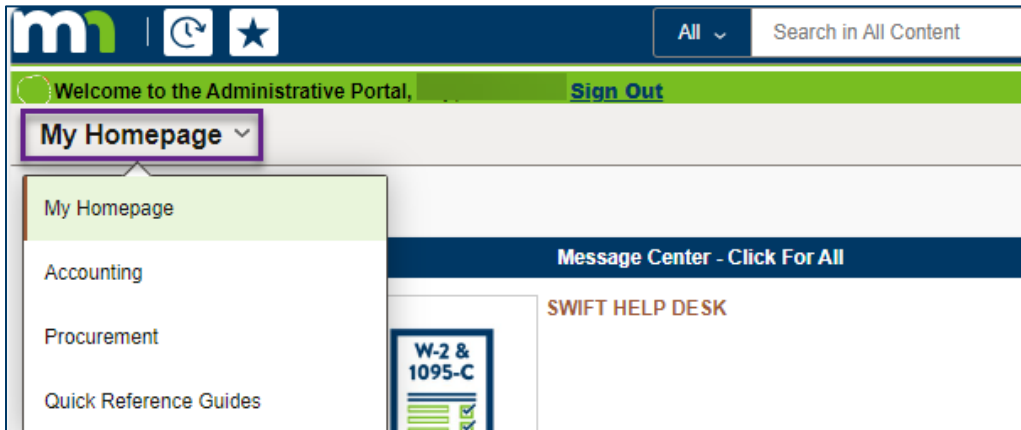


After signing in to the Administrative Portal, you land on My Homepage. On My Homepage, you see tiles that let you navigate to different menu options.

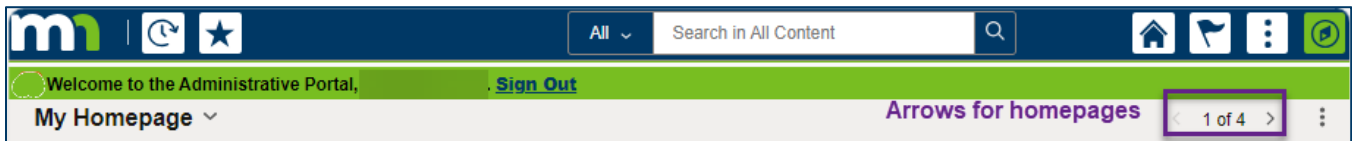
- All employees see the Message Center, System Status, Careers, Learning Management, and Self Service tiles. Other tiles may or may not display, depending on what security roles you've been assigned.
- SWIFT users with security roles see the Data Warehouse tile, which brings them to the EPM Data Warehouse with reporting capabilities for SWIFT data.
- If you have access to SWIFT, you access the modules through the Accounting and Procurement tiles.
- Agency staff who approve SWIFT transactions see the Approvers tile.

There are several ways to access My Homepage from the global menu.

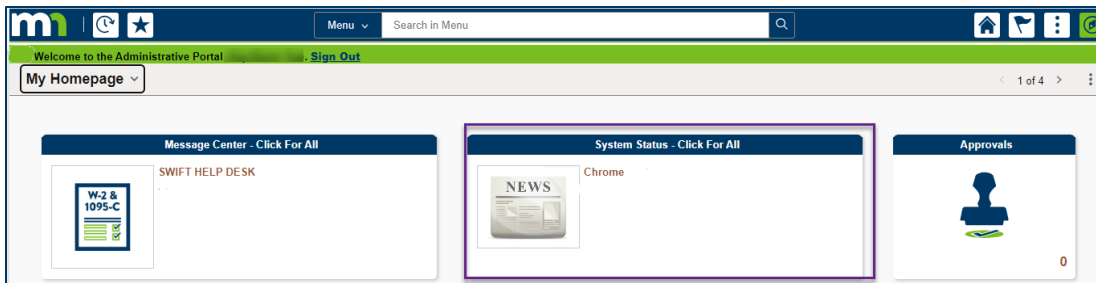
1. **Left Side Menu:** When you first sign into the Administrative Portal, My Homepage appears. The left My Homepage menu allow you to access other homepages, such as Accounting, Procurement and Quick Reference Guides.



2. **Right Side Arrow icons:** In the Administrative Portal, you can also toggle through the homepage options using the arrow icons.



System Status



The System Status page shows the current status of all statewide systems accessed through the Administrative Portal. Look here for information regarding system maintenance or downtime.

It includes the following statewide systems.

- Budget Applications - including Capital Budget System (CBS), Fiscal Note Tracking System (FNTS), and Budget Planning and Analysis System (BPAS)
- Data Warehouse
- Learning Management
- Self Service
- SEMA4
- SWIFT

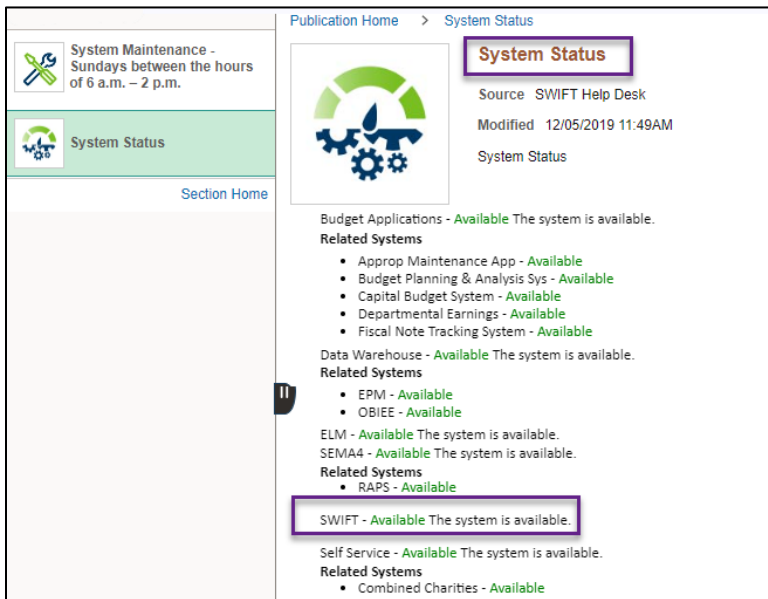
If the Administrative Portal is down, you cannot see the System Status tile. Consider signing up for the SWIFT FMS Systems Status Notifications on MMB's [Email Subscriptions](#).

Steps to use the System Status tile

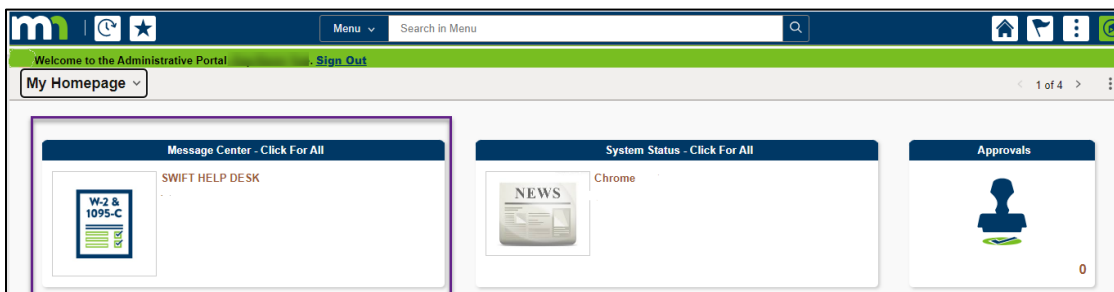
1. On the Administrative Portal, select the **System Status** tile.
2. On the System Status page, select the **System Status** section.



3. In the list of enterprise-wide systems, you can see if the system is available.

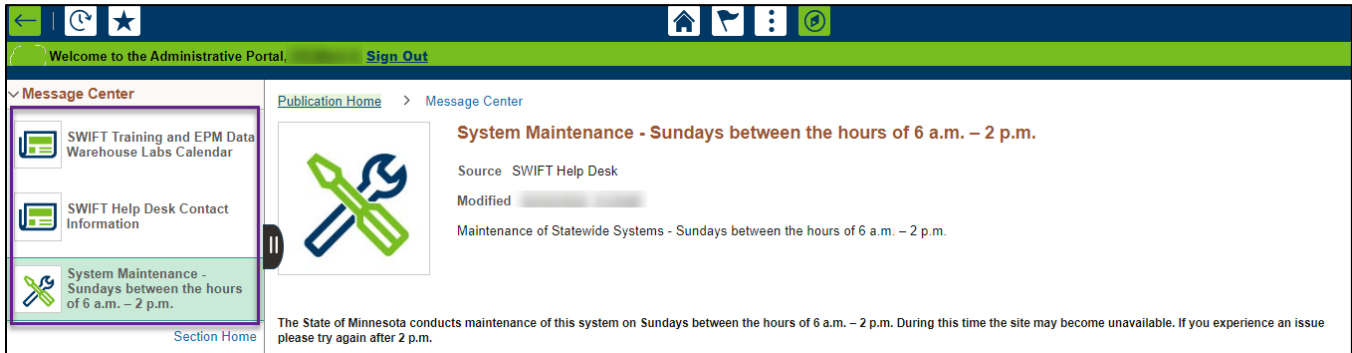


Message Center



The Message Center displays messages regarding any statewide system accessed through the Administrative Portal.

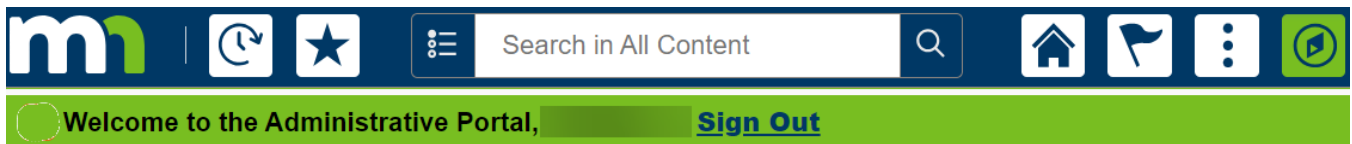
- Statewide systems messages could include general maintenance, SWIFT, EPM Data Warehouse, Learning Management (ELM), Capital Budget System (CBS), Fiscal Note Tracking System (FNTS), Budget Planning and Analysis System (BPAS), Self Service, and SEMA4.
- You will see only one news article listed at a time. Select the tile to see all messages.
- When you select the Message Center tile, the Message Center page lists SWIFT Help Desk Contact Information, the most recent SWIFT Newsletter, SWIFT and EPM Data Warehouse training, and recent messages.



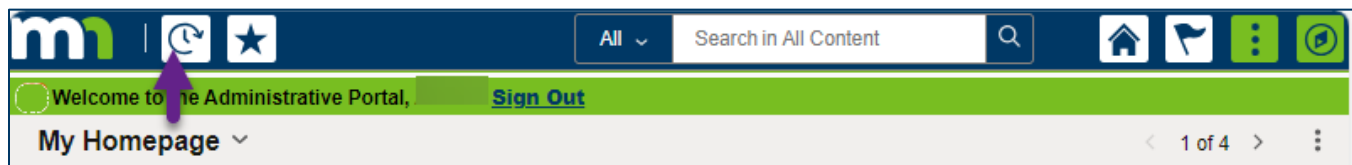
NOTE: Messages about benefits such as W2s and open enrollment are only available in the Message Center in the Self Service Portal.

Global Menu

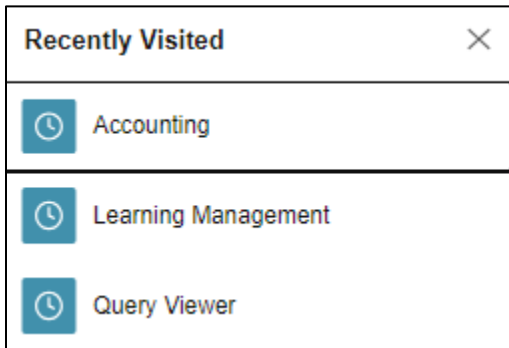
Every page in the SWIFT has the global menu at the top of the page with the icons described here.



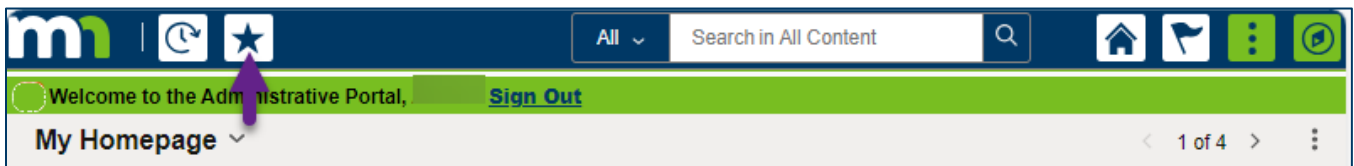
Recently Visited



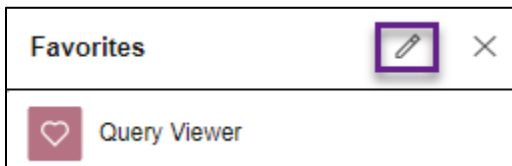
This icon looks like a clock hand with a circular arrow around it. If you select it, SWIFT will open a menu of options of the pages your recently visited.



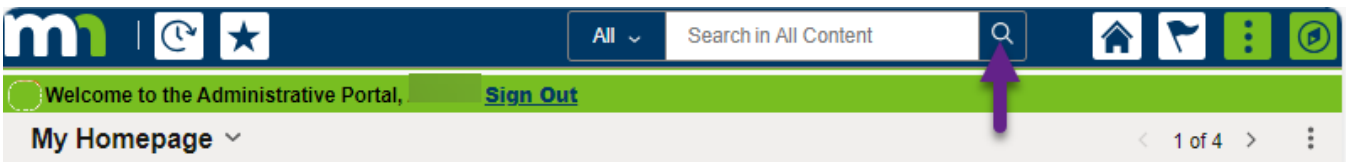
Favorites



This icon looks like a star. If you select it, SWIFT will open a menu of options of the pages you recently visited. You will be able to access your saved Favorites from the NavBar. You can edit your Favorites by selecting the Edit Favorites icon, which looks like a pencil.



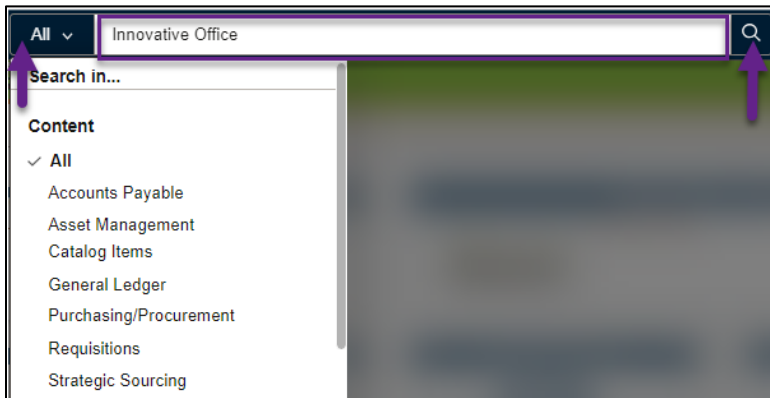
Global Search



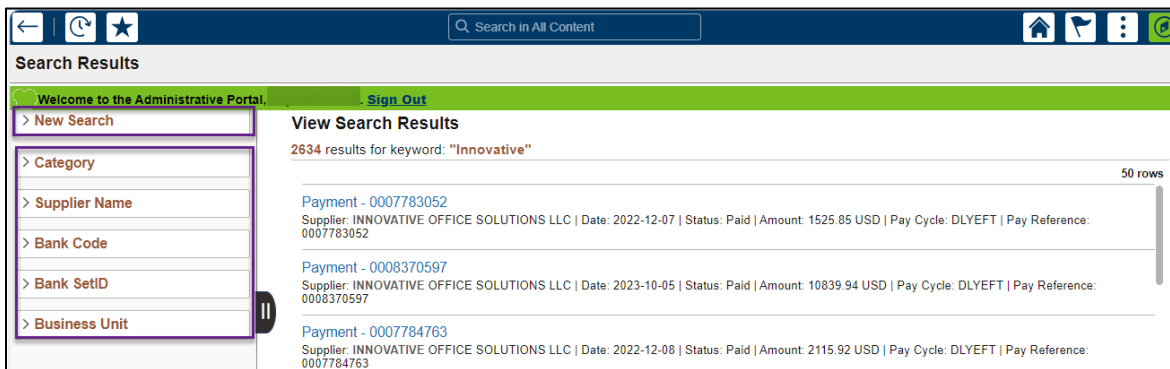
The **Global Search** allows you to search transactions across modules in SWIFT. Accounting and Procurement modules have additional search capabilities within them. It searches all content that you have security permissions.

Steps to use Global Search

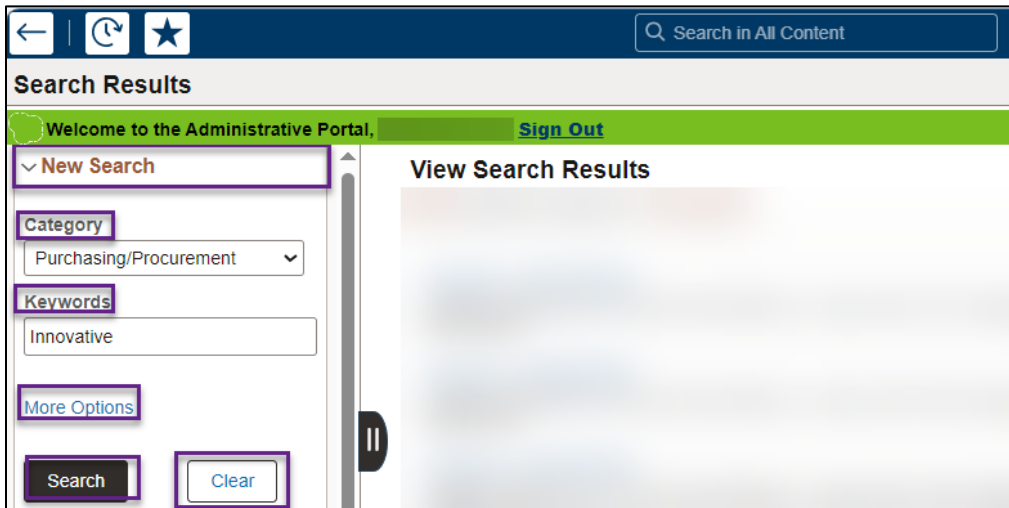
1. Start by entering search terms in the search field. The left drop-down list allows you to search in a SWIFT module or you can search by "All." Select the **Search** icon.



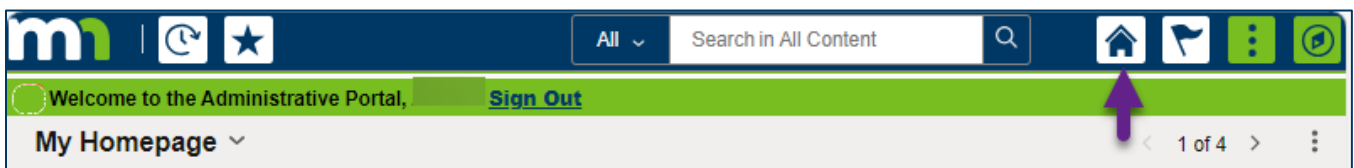
2. SWIFT opens the Search Results page.
 - The left menu allows you to see all of the results by areas such as Category, Supplier Name, and Business Unit.
 - The work area of the page shows a list of SWIFT individual transactions or documents with your search term.



3. As an option, you can update your search.
 - Select **New Search** button in the left menu. Update the Category and Keywords fields. Then, select **Search**.
 - To start over, select the **Clear** button.
 - To expand search options, select the **More Options** link. SWIFT opens a menu with the additional search options.

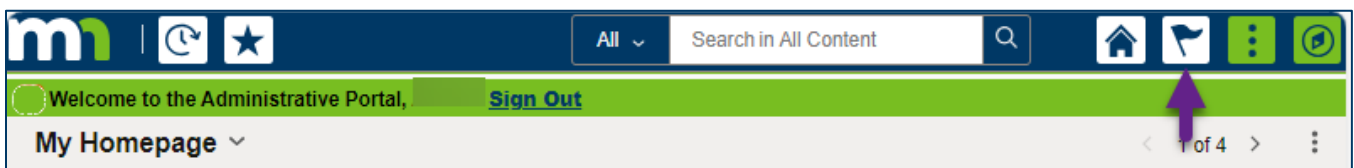


Home

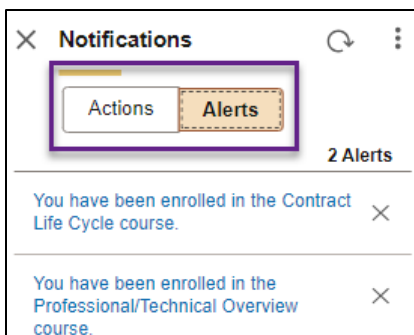


The Home icon is a house. Select it to return to My Homepage.

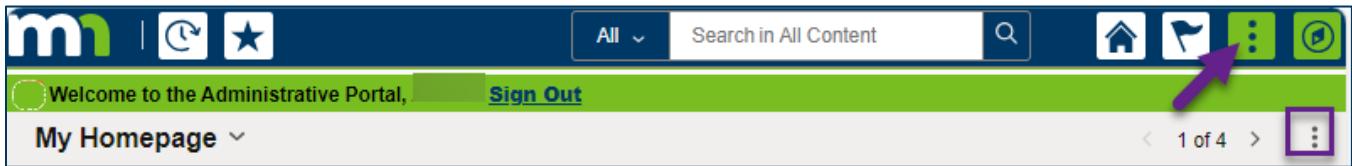
Notifications



The **Notifications** icon is a flag. Selecting it opens the Actions and Alerts tabs. What you see in these tabs depends on your security roles. Notifications work differently in every module. Typically, Actions and Alerts can cover any message from the Administrative Portal such as approvals or enrollments in Learning Management.

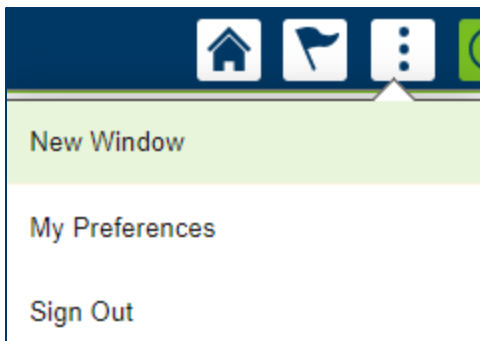


Actions



The Actions icon is three dots. Depending on the page you are on, it brings you to menu options.

Actions icon in the global menu: New Window, My Preferences, and Sign Out



New Window

SWIFT opens a separate SWIFT browser window. Caution: SWIFT will timeout after 20 minutes of any window.

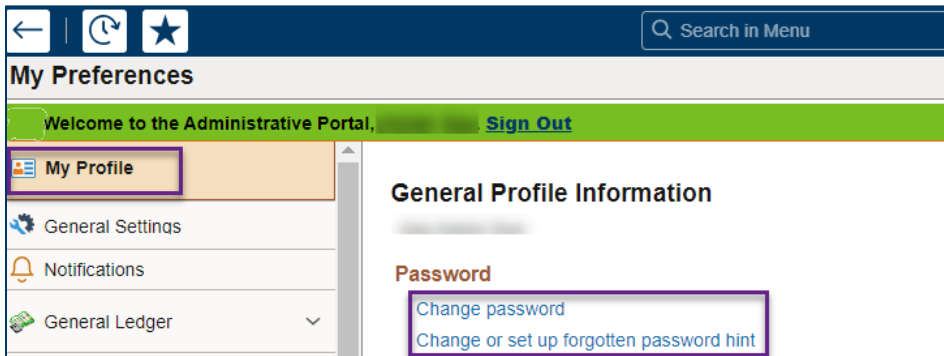
My Preferences

My Profile page

In the My Profile section, you can change password, change your password hint, set up screen reader functionality, set up an alternative user, and turn on workflow attributes.

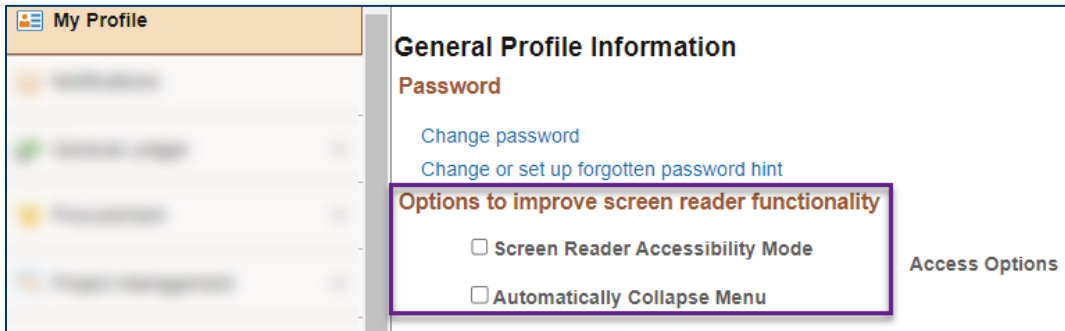
IMPORTANT! Activate changes to this page by pressing **Save** at the bottom of the page.

- **Password section**
 - **Change password.** Select the **Change password** link. SWIFT opens the Change password page. Enter your current password and your new password. Confirm your new password, then select **OK**.
 - **Change or set up forgotten password hint.** Select the **Change or set up forgotten password** hint link. SWIFT opens a page that allows you to have a new password generated for you. Enter a question and your response for SWIFT to authenticate you. Select **OK**.



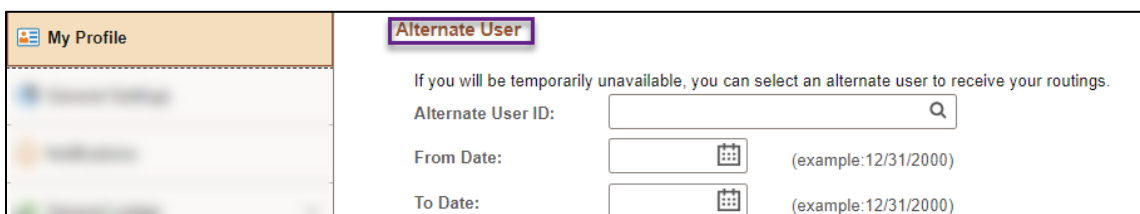
- **Options to improve screen reader functionality section**

If you check the **Screen Reader Accessibility** box, SWIFT will add screen reader functionality to use navigate through SWIFT.



- **Alternate User section**

If you will be temporarily unavailable, you can set up alternative user to receive your routings such as approvals and processing transactions. Your alternative user must have the same permissions you have. Enter the Employee ID and select the From and To Dates.



- **Workflow Attributes section**

Use this section to turn on Workflow attributes. Check the Email User to receive approval email notifications.

Workflow Attributes

Email User Worklist User

Email

Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	[REDACTED]

Activate changes to this page by pressing Save.

Save

General Settings page

Use the General Setting page to change the accessibility layout, customize page settings for all pages, add an enhanced cursor, and display keyword search help.

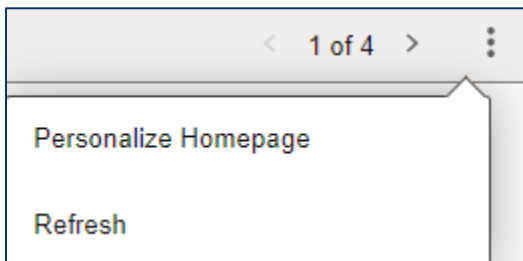
My Profile	General Settings	Save
General Settings	<p>General Options</p> <p>Accessibility Layout: Screen reader mode off ▾</p> <p>Customize Page Settings: <input type="checkbox"/> No</p> <p>Enhanced Cursor: <input type="checkbox"/> No</p> <p>Display Keyword Search Help: <input checked="" type="checkbox"/> Yes</p> <p>> System & Application Messages</p> <p>> Navigation Personalizations</p>	
Notifications		
Procurement		
Sourcing		

For more information about this option, view the [Personalize Default Navigation Settings](#) quick reference guide under SWIFT Basics in the Training Guides and Resources page.

Sign Out

ALWAYS use select the Sign Out when you are ready to sign out of SWIFT.

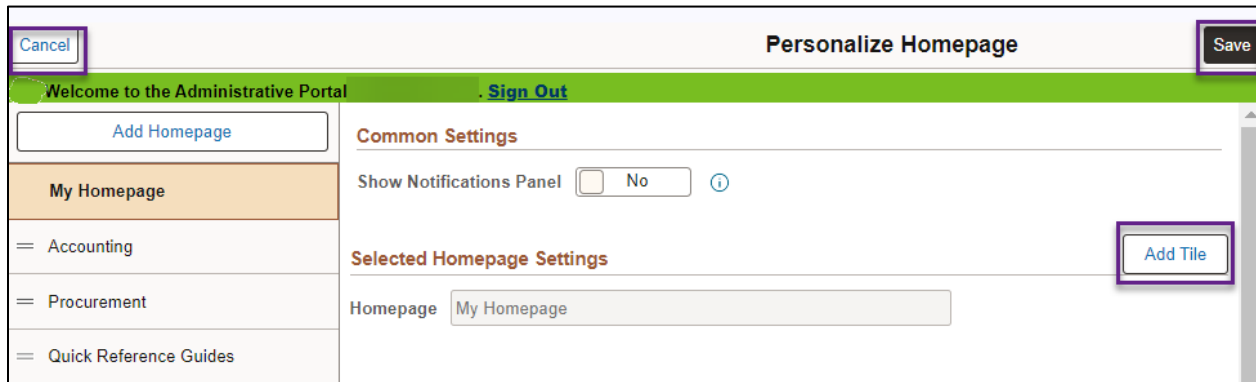
Homepage Actions icon below the global banner: Personalize Homepage and Refresh



Personalize Homepage

Selecting this option brings you to the Personalize Homepage page. Use this page to add or remove tiles on your homepage. Some tiles are fixed and can't be removed.

- Use the **Add Tile** button to find and add tiles.
- Use the **Save** button to save the desired changes to your tiles.
- Select **Cancel** to get tiles back.

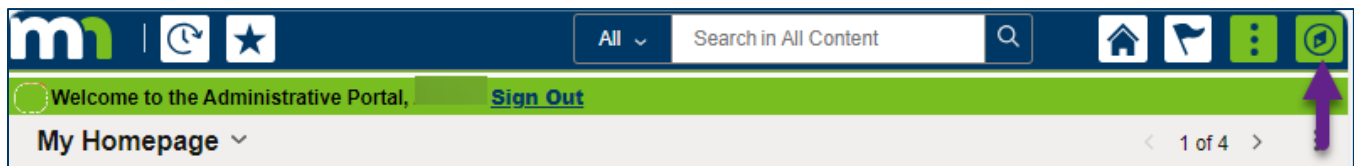


For more information about this option, view the [Personalize Default Navigation Settings](#) quick reference guide under SWIFT Basics in the Training Guides and Resources page.

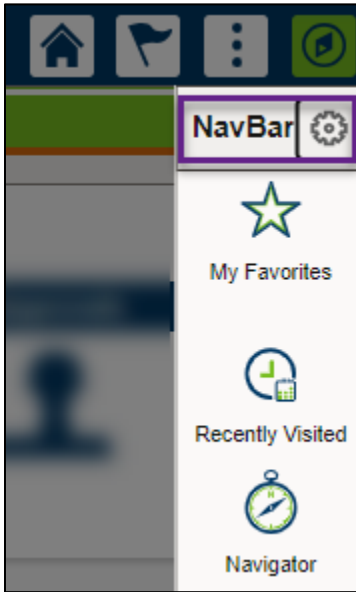
Refresh

If you select this option, SWIFT updates the page with the latest version of that page's information.

NavBar

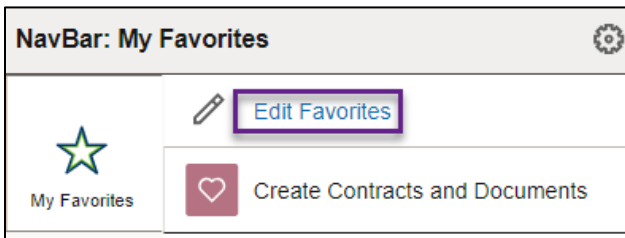


The NavBar icon looks like a compass pointing to the right. Selecting this icon allows you to access My Favorites, Recent Places, and Navigator. It also includes the Personalize NavBar icon, which is a gear. Selecting this icon brings to a page to modify the NavBar menu.



My Favorites

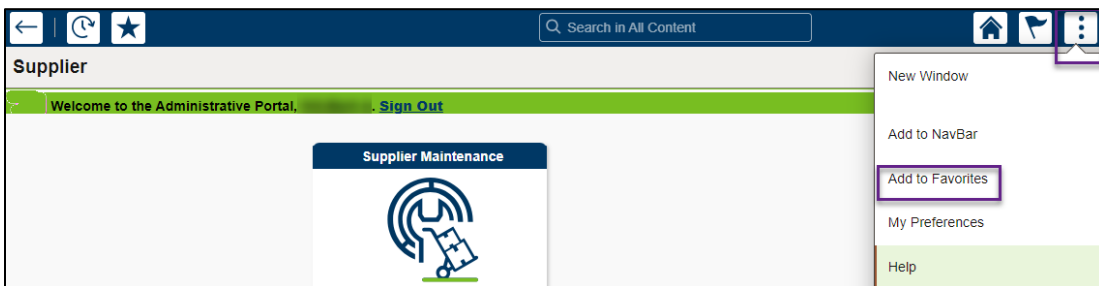
Selecting this item brings you to the My Favorites page. It allows you to easily find your favorite pages from SWIFT.



Steps to add a page to My Favorites.

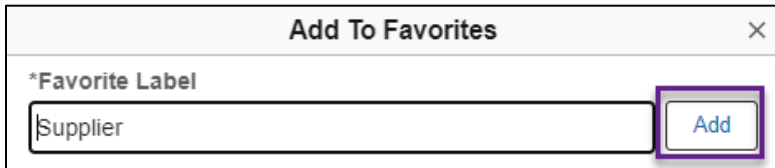
1. Select a SWIFT page and open the **Actions** icon, which is three dots.

The Actions menu opens and you can add that page to My Homepage, the NavBar, Favorites, and My Preferences.

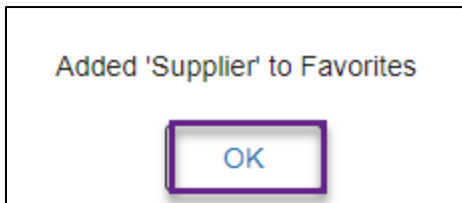


2. Select the **Add to Favorites** option.

3. SWIFT displays the Add to Favorites window. In the Favorite Label field, you can name the page so that it makes sense to you. Select **Add**.



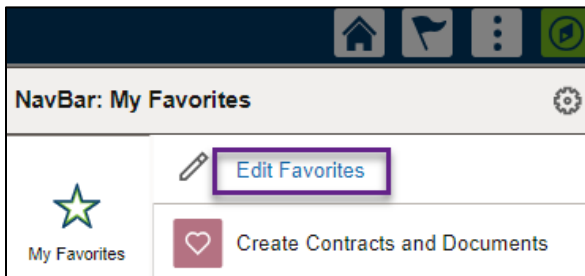
4. SWIFT a confirmation message. Select **OK**.



5. The SWIFT page appears in the NavBar in My Favorites.

Steps to edit the list or delete a page from My Favorites.

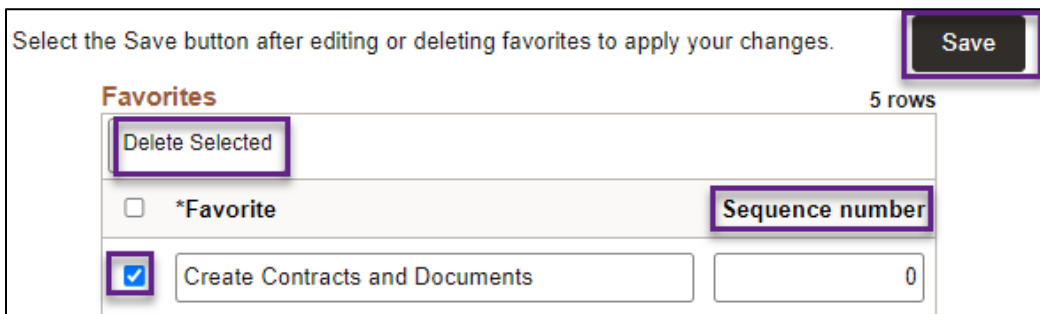
1. **Open** My Favorites from the NavBar and select **Edit Favorites**.



SWIFT displays the Edit Favorites page. You have options on this page.

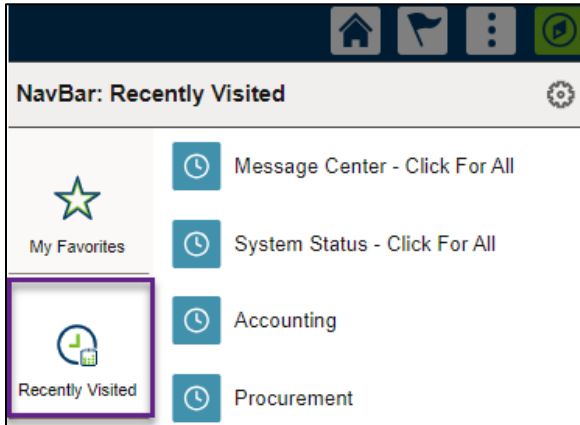
- You can renumber the list using the Sequence number fields.
- You can delete an item by checking the box next to a favorite and select the **Delete Selected** button.

When you are done, select **Save**. Then, select another menu option to leave this window.



Recently Visited

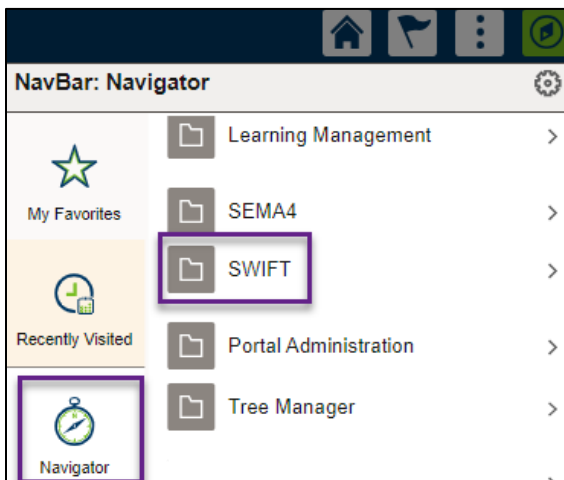
Select this option to view a page or backtrack to recently opened pages in SWIFT.



Navigator

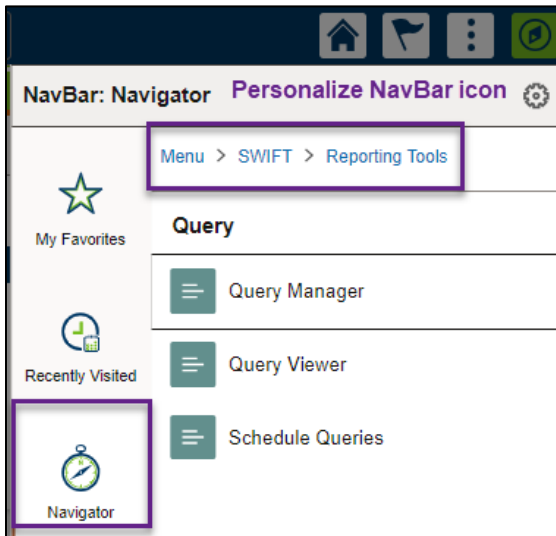
The Navigator lets you access all available menu options, including those not displayed as tiles on My Homepage. What you can access in the Navigator depends on your security roles.

- The Navigator serves as a breadcrumb trail in the navigation.
- This navigation allows to retrace your steps to find your way backward and forward.



SWIFT displays the NavBar main menu. Select "SWIFT." The menu shows the modules and functions. You can access pages that you have permissions for. Select the menu options until you get to the desired page.

- The **Menu** link brings you to the NavBar main menu.
- Next to the Menu link are links that represent breadcrumbs so that you can see the navigation inside the NavBar.

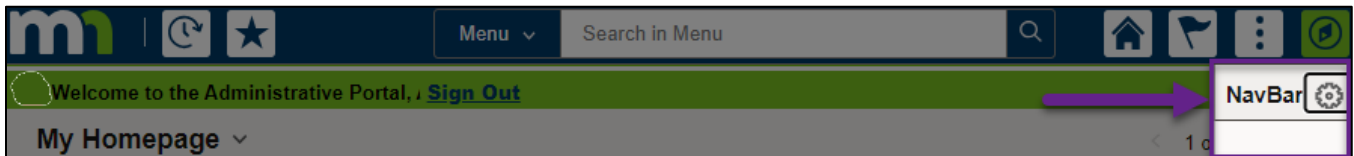


Personalize NavBar icon

The Personalize NavBar icon is a gear at the top left of the Navigator page. It allows you to add the tile in the NavBar menu.

Steps to add a tile to the NavBar menu

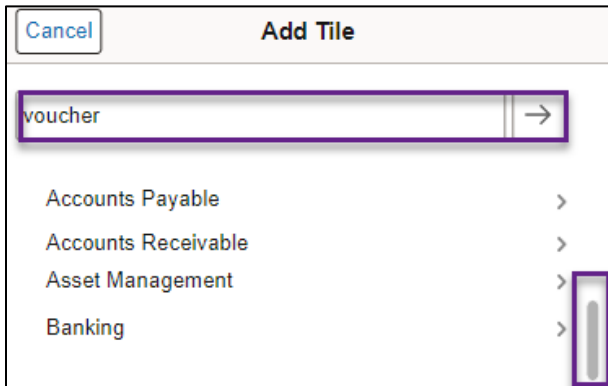
1. Open the **NavBar** menu and select the **Personalize NavBar** icon.



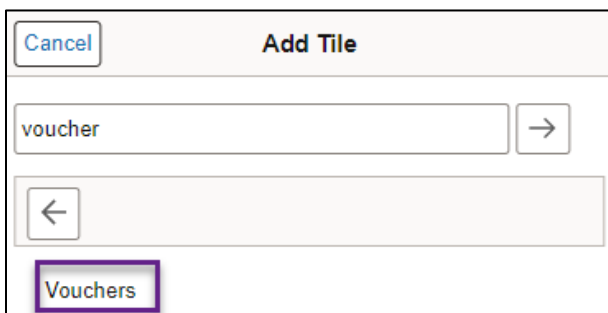
2. SWIFT opens the Personalize NavBar window. Select the **Add Tile** icon.



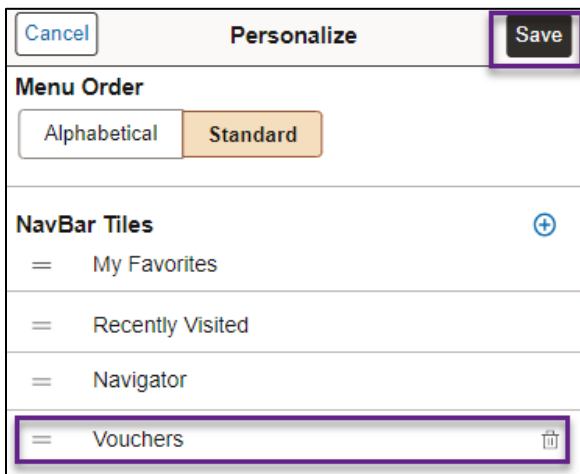
3. SWIFT opens the Add Tile menu. You can search for it in the search field. You can also scroll through the list to find our desired option.



4. SWIFT displays options that fit your search criteria. Select the desired one.

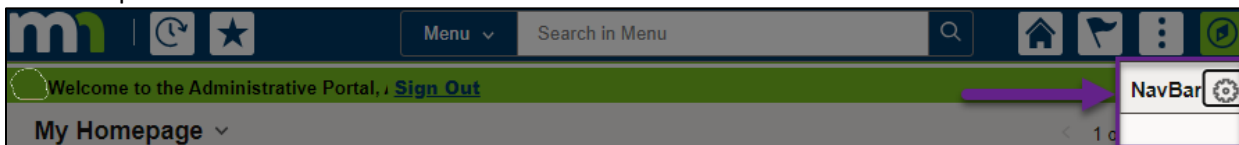


5. SWIFT adds the tile to the Personalize NavBar page. Select **Save**.

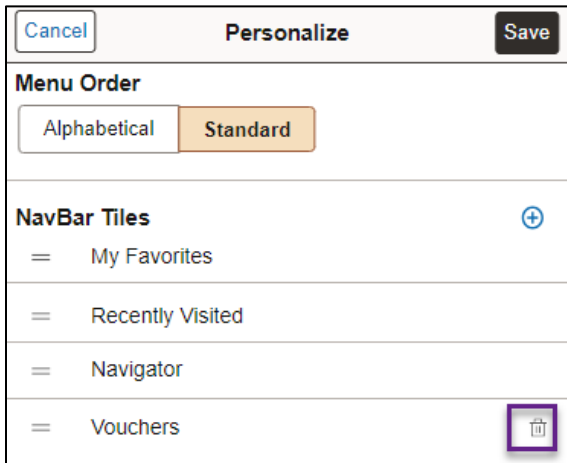


Steps to delete an added tile from the NavBar menu

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



2. SWIFT open the Personalize NavBar page. Select the **Delete** icon next to the item you wish to delete.



Sign Out

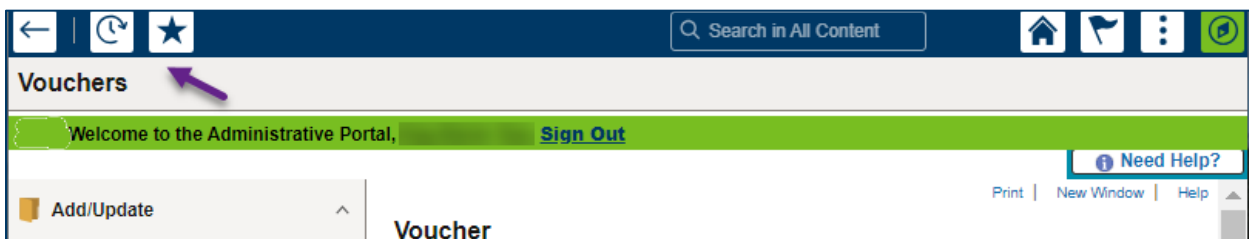
ALWAYS use select the **Sign Out** link at the top of the page when you are ready to sign out of SWIFT.



Global Menu on Application pages

When you go into an application page, such as a SWIFT module, the global menu will be slightly different.

Icons on the left side of the page.



1. **Return Arrow.** This icon is an arrow pointing to the left. If you select it, SWIFT will return to the previous page.
2. **Recently Visited.** If you select it, SWIFT will open a menu of options of the pages you recently visited.
3. **Favorites.** If you select it, SWIFT will open your Favorite menu.

Other Navigation

SWIFT WorkCenters

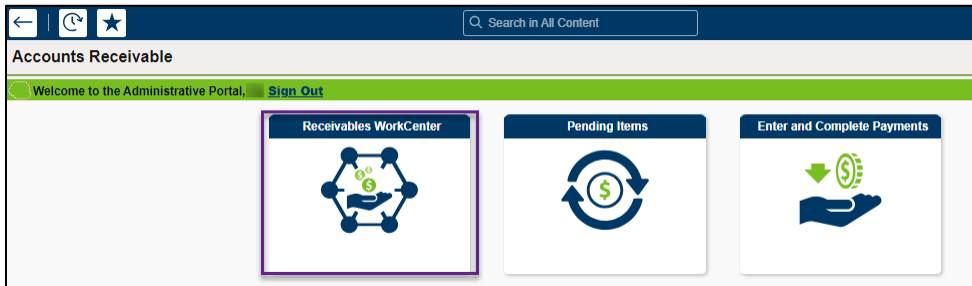
WorkCenters provide a centralized place where you can access frequently used pages, links, queries, reports, and processes in a SWIFT module. Options that you see in a WorkCenter depend on your security roles and the functionality of the individual WorkCenter.

List of the SWIFT WorkCenters

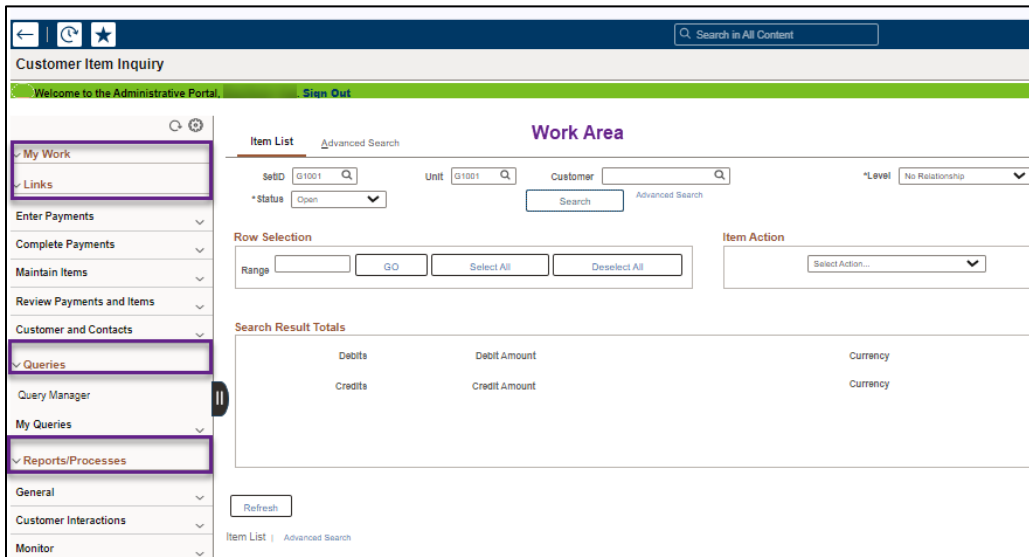
- Accounts Payable WorkCenter, Accounts Payable module
- Asset Management WorkCenter, Asset Management module
- Billing WorkCenter, Billing module
- Buyer WorkCenter, Purchasing modules
- Contract/Sourcing WorkCenter, Supplier Contract and Strategic Sourcing modules
- GL/KK WorkCenter, General Ledger/Commitment Control modules
- Grants WorkCenter, Grant Management module
- Project WorkCenter, Project Costing module
- Receivables WorkCenter, Accounts Receivable module

WorkCenter Components

Access a WorkCenter from the module page.



When you open a WorkCenter, the left-menu and the work area display.



The left-menu allows you to select commonly used features, which are organized according to these sections:

- My Work (your work in progress)
- Links (pages)
- Queries (associated with module)
- Reports and Processes

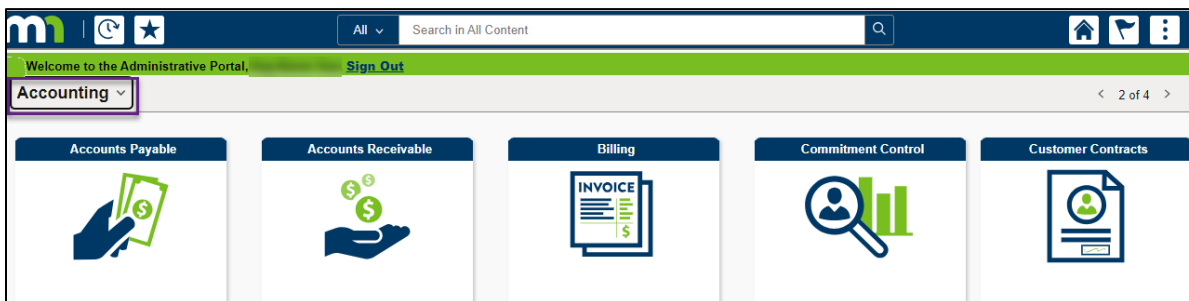
The work area allows you to complete transactions in that module.

Tile-Based Navigation

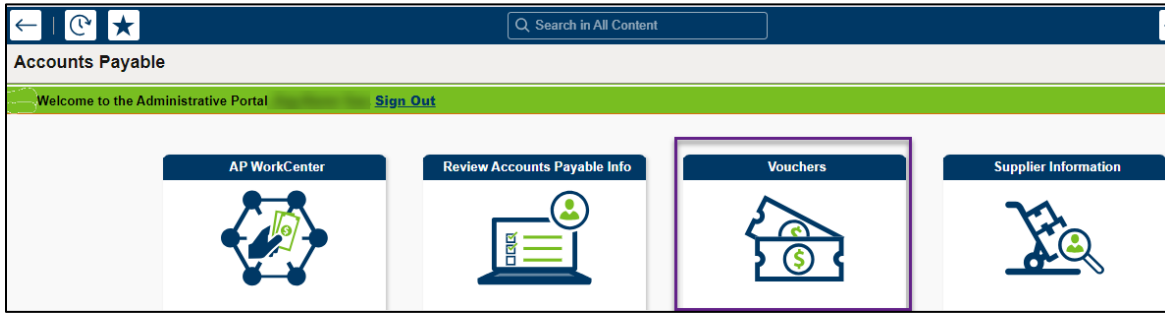
The Administrative Portal and SWIFT’s navigation are tile-based. Tiles allow you to drill down through the tiles until you arrive at the desired page.

For example, navigate to the Voucher Regular Entry page in the Accounts Payable module.

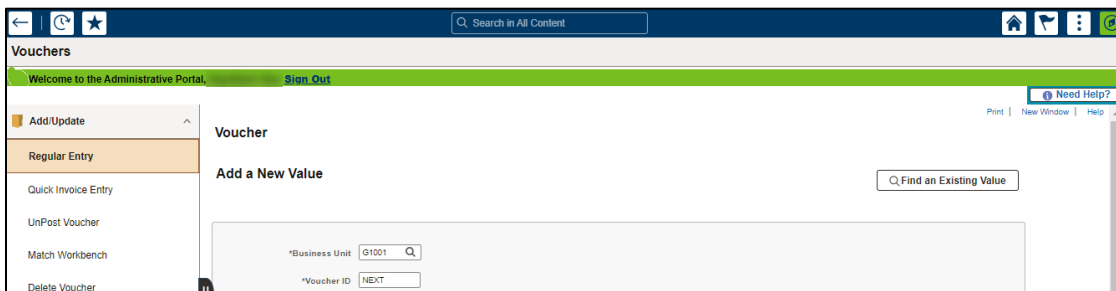
1. When you select a SWIFT tile in the Administrative Portal, such as Accounting, SWIFT brings you to the page with tiles for that page, such as the Accounts Payable module.



2. When you select a tile, SWIFT brings you to that next page. Depending on the module, SWIFT brings you to the new page with tiles with navigation options.



3. SWIFT drills down through the tiles until it lands on the desired page for that module, such as the Voucher Regular Entry page.



Navigation Collection

SWIFT’s navigation collection is a grouping of links. These links represent a navigation path through the tiles to the desired page. SWIFT quick reference guides use tables that describe the navigation options such as the navigation collection. This table might include more than one navigation option to access a SWIFT page.

This table example describes the tile-based navigation from the Administrative Portal to a transactional page, such as the Voucher Regular Entry page.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Payable, Vouchers. The Voucher Regular Entry defaults.
WorkCenter	Accounting, Accounts Payable, AP WorkCenter, Links section, Vouchers, Regular Entry.

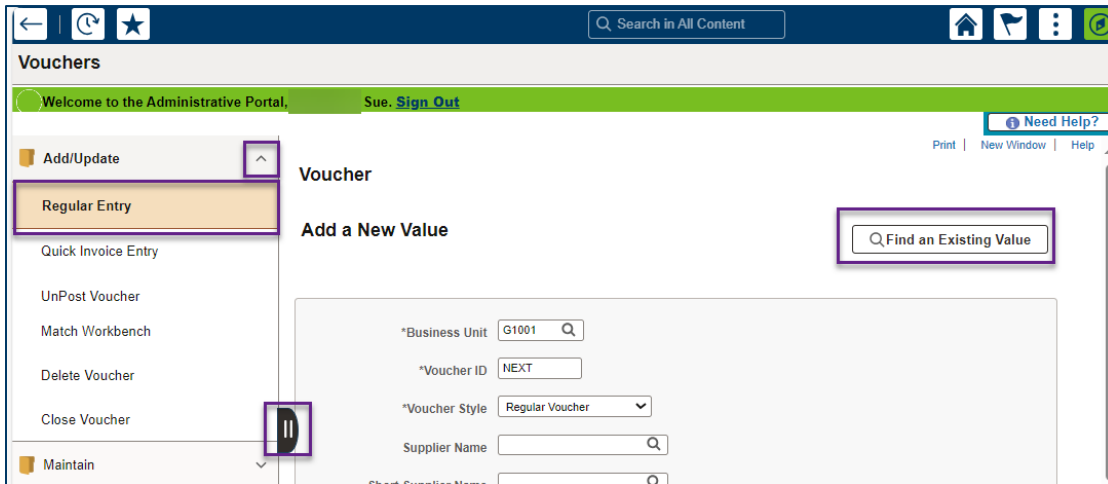
Navigational Objects

When you navigate to an application page such as Voucher Regular Entry page, you see common objects in it that help you find and enter requirements for that page.

Left Menu and Work Area in an Application page

The left-menu displays on the left side of the page, while the work area displays on the right.

- To hide or unhide the left-menu, select the double-bar icon. It is a blue box with two lines inside.
- Select the down or up arrow icon to open or close a folder under the left-menu.
- Select the page name under a folder to open a SWIFT page. SWIFT opens it in the work area.
- Select the Find an Existing Value button to inquire about transactions in this module.



Tabs

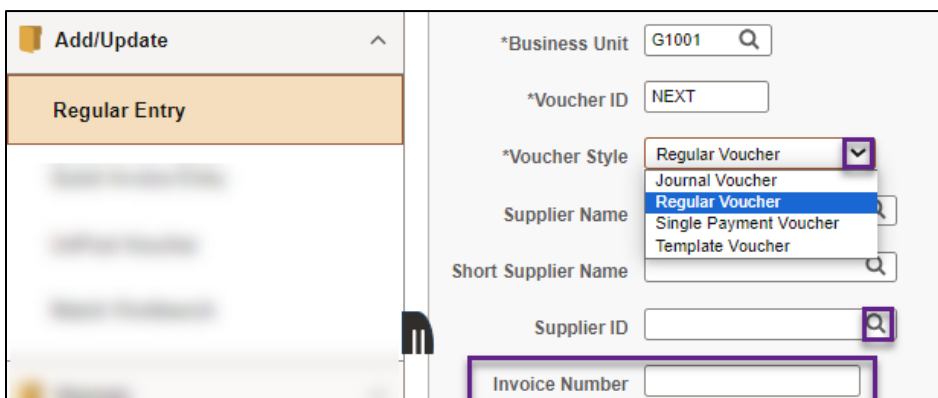
A tab is a navigational object that allows you to access a page in SWIFT. Tabs look like a file folder. When selected, the tab displays the highlighted page.

In many SWIFT modules, you see the Find an Existing Value, Keyword Search, or Add a New Value tabs to find or enter a new transaction.

Open Fields

Open fields appear on pages in SWIFT to enter information.

- Fields are indicated by rectangular boxes that let you type information inside.
- In the following image, Invoice Number is an open field.



Drop-Down Lists

Drop-down lists appear by fields to aid searches by selecting an option from the list.

- Drop-down lists are indicated by the downward arrow icon.
- In the above image, Voucher Style is a drop-down list.

Fields with a Lookup Icon using Operators

Some fields require that you select a predetermined value. They have a Lookup icon. When you select the Lookup icon, SWIFT opens a Look Up window to help you find the correct value. This window uses comparison operators.

- In the previous image, the Supplier ID is a field with a Lookup icon.
- When you select the Lookup icon, SWIFT opens the Look Up Supplier ID window. Select an operator as needed. The operator defaults to “begins with.”

Operators used in SWIFT Look Up windows

Operator	Description
Begins with	It starts with the value entered. You can enter a partial value. For example, a supplier name might begin with “Duluth.” The search results show suppliers such as “Duluth Art Institute.”
Contains	It contains the value. You can enter part of the value and the results look for that value anywhere in the predetermined data set. For example, a supplier name may contain “Duluth.” The search results show all values such as “A Shade of Duluth” as well as “Duluth Art Institute.”
=	It is equal to a specific value. If you enter “Duluth” in the supplier name, you get no results. You must enter the exact name such as “A Shade of Duluth.”
Not =	It is not equal to a specific value. The search results show all values that are not equal to the value. For example, if you enter a calendar date of “10/10/2022,” you get all the other dates in that field.

Operator	Description
<	It is less than a specific value. For example, if you enter an amount of “100,” the search results look for all values less than “100” such as “99” and “05.”
<=	It is less than and equal to a specific value. For example, if you enter an amount of “100,” the search results look for all values that are “100” and lower.
>	It is greater than a specific value. For example, if you enter an amount of “100,” the search results show all values larger than “100” such as “101” and “102.”
>=	It is greater or equal to a specific value. For example, if you are looking for Voucher IDs with numeric values greater than or equal to “00040162,” the results show that Voucher ID and all of them with numbers greater such as “00040163” and “00040164.”
Between	It looks for values in between a range. For example, search for the dates of Voucher IDs between “10/03/2022” and “10/10/2022.”
In	It looks for values that are in a specific field. For example, all vouchers in the date of “10/03/2022.”

Wildcards in Search Fields

Some search fields allow for a wildcard. A wildcard is a symbol that acts as a placeholder for unknown information. In SWIFT the wildcard is “%.” It is the percentage sign.

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.

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches

Saved Searches

Business Unit: = G1001

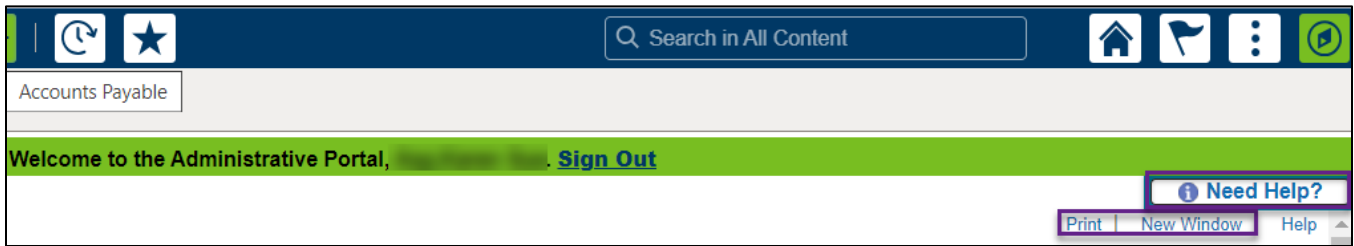
Voucher ID: begins with 00040%

SWIFT displays all values beginning with “00040.”

Links

A link brings you to other options. It is a word or phrase in a blue font.

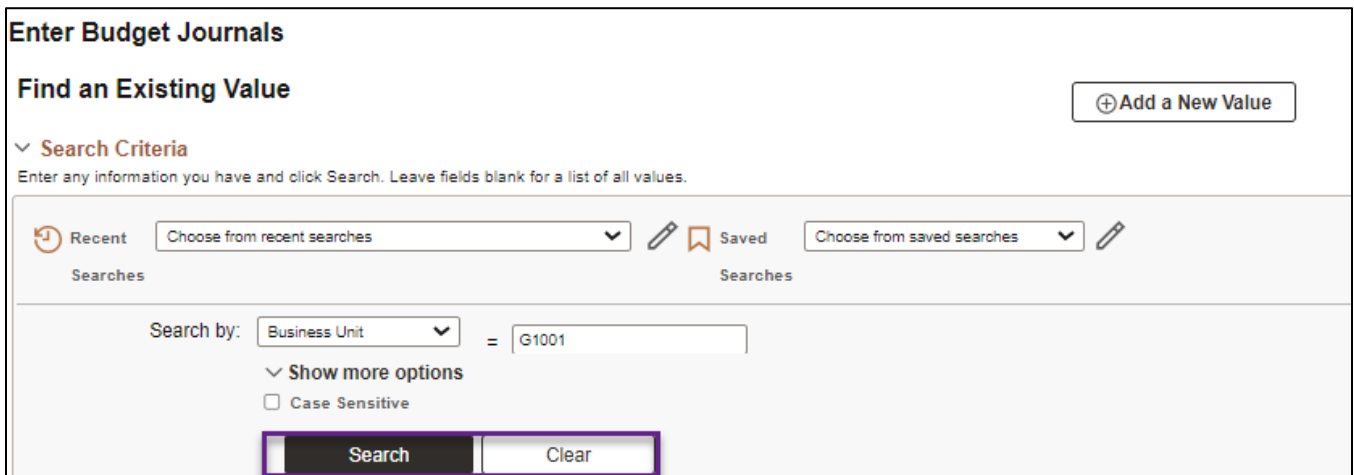
- At the top of module pages, SWIFT lists links at the top right of page. Select one of these links to print the page, go to a new SWIFT window in your browser, and get help.



CAUTION! If you select the New Window link, SWIFT may time you out of one of your windows. You may lose information or a process.

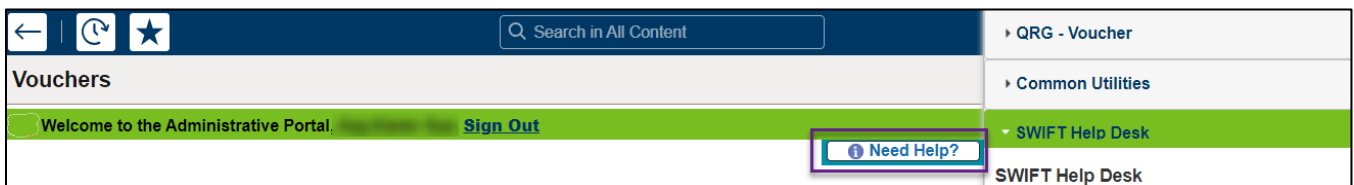
Buttons

Buttons appear on pages to execute specific functions. Buttons are text boxes in SWIFT. For example, Search and Clear are buttons on module search pages.



Need Help? Button

The Need Help? button is available in all SWIFT modules when you are in a page inside of a module. These help pages open in a separate window so you can review the resource while you are working on a transaction.

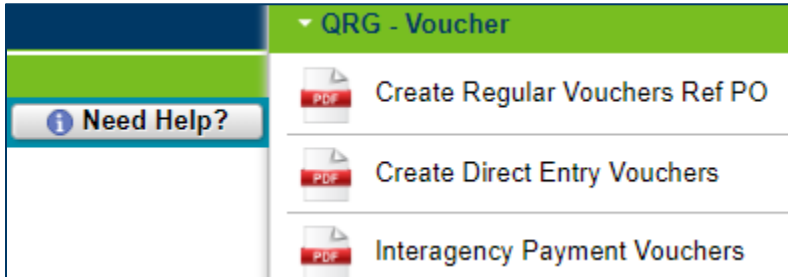


IMPORTANT. When you are done using these options, select the Need Help? button again to close it.

The Need Help? button displays three menu options.

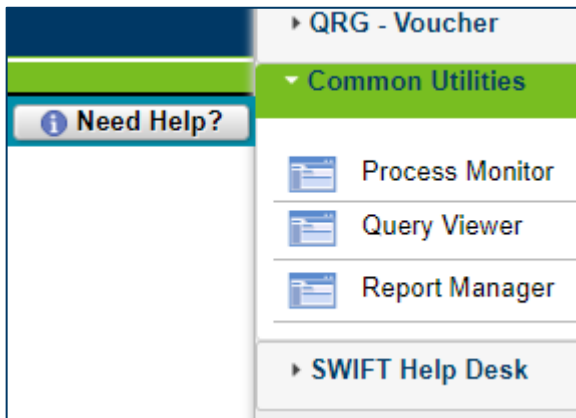
QRG - Quick Reference Guides

This option opens as the default. It lists all the quick reference guides for that module.



Common Utilities

Go below the QRG list to open Common Utilities.

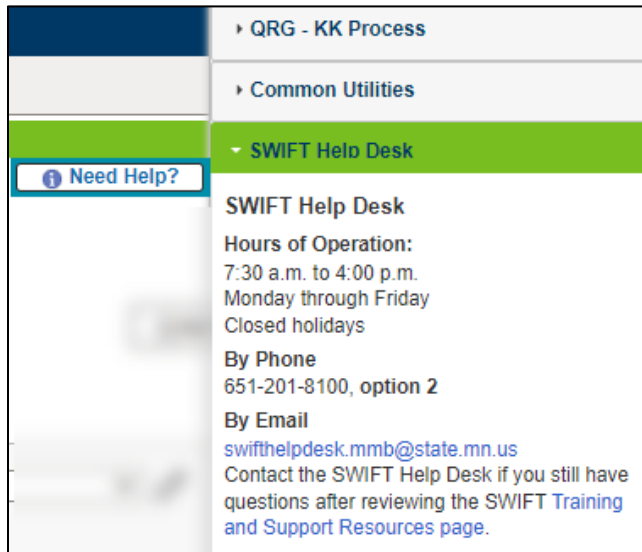


The Common Utilities menu lists these options. These options are covered in more detail in the [SWIFT Basics](#) quick reference guides page.

- Process Monitor: Use to track the progress of requests.
- Query Viewer: Use to run queries that allow you to look up and extract SWIFT data.
- Report Manager: Use to see the inbox of your processes and reports.

SWIFT Help Desk

Go below the Common Utilities to open SWIFT Help Desk information. The SWIFT Help Desk supports questions related the SWIFT financial and procurement processes. You can see the hours of operation, phone number, and email address.



SWIFT MODULES

There are two tiles in the Administrative Portal that allow you access to SWIFT modules: Accounting and Procurement.



- **Accounting tile.** The content and functionality in the accounting modules are managed primarily by Minnesota Management and Budget.
- **Procurement tile.** The content and functionality in the procurement modules are managed primarily by the Office of State Procurement division in the Minnesota Department of Administration.

Accounts Payable (AP)

The Accounts Payable (AP) module allows accounts payable staff to enter vouchers, which records payments to suppliers for goods or services received. Staff can enter information directly into a voucher or by copying information from other sources, such a dispatched purchase order or a receipt.

Agency staff responsible for entering and managing vouchers use this module. The AP module also lets agency staff with permissions to perform voucher maintenance and voucher approvals.

Key Term	Description
Budget checking	Budget checking is the process of validating the voucher against the available budget as determined by ChartField information on the voucher.
Matching	Matching is the process of applying system match control rules against vouchers, purchase orders, and receipts in SWIFT. It ensures that the voucher being entered reflects the amounts ordered and received before it is approved for payment.
Supplier ID	Suppliers are registered entities that provide goods and services to the State of Minnesota. Make sure to select the correct Supplier ID for vouchers.
Voucher	In SWIFT, a voucher is the mechanism by which the State of Minnesota electronically pays for goods and services. A voucher is usually prepared after a supplier's invoice has been matched with the receipt or purchase order if the voucher was created referencing a receipt or purchase order.

View the [Accounts Payable](#) quick reference guide page for more information.

Accounts Receivable (AR)

The Accounts Receivable module allows agency staff to create deposits, apply payments, and manage customer accounts. There are two types of deposits. One is a Direct Journal deposit and is used for miscellaneous cash receipts. The other type of deposit is a Regular Item deposit. AR items are SWIFT invoices attached to customer accounts. The invoice is entered as a bill in the Billing module and then moves over to the Accounts Receivable module so that when a customer makes a payment, the payment is applied to the item.

Agency staff responsible for entering deposits and receiving customer payments use this module. They may also be responsible for managing billing transactions.

Key Term	Description
AR Update	This is a process in SWIFT that takes a pending AR transaction and posts it to the General Ledger and customer accounts as appropriate.
Bill	A bill in SWIFT is also called an invoice. Outgoing bills are created in the billing module and provide information about the goods and/or services the State of Minnesota provided to a customer and the dollar amount owed for those goods and/or services.

Key Term	Description
Customer	Customers are entities that purchase goods and services from State agencies. They are setup and maintained separately by each agency. Interagency customers are set up centrally by SWIFT Module Support. SWIFT stores customer information in both the Accounts Receivable and Billing modules.
Invoice	An invoice is a list of goods and/or services provided by the State of Minnesota to a customer. The invoice includes a description of any goods and service and a full accounting of the money owed.

View the [Accounts Receivable](#) quick reference guide page for more information.

Asset Management (AM)

Agency staff use the Asset Management module (AM) to maintain assets throughout their life cycles. Staff can create assets manually in the AM module. Assets can also be generated from information entered during the purchasing, receiving, and vouchering processes. Each agency determines if an item is an asset that needs to be tracked in this module.

Agency staff responsible for managing assets in the receipts and purchase order modules use this module.

Key Term	Description
Asset	An asset is any item that is owned by the State of Minnesota. Assets can be tangible such as computers, vehicles, or office equipment. They can also be intangible such as internally developed software, intellectual property and water or timber rights. Asset transactions are important to record at the matching process for entering vouchers referencing a purchase order.
Profile ID	In the PO and AM modules, each asset has a unique Profile ID. The Profile ID tells SWIFT that this purchase is an asset that should be processed into the AM module.

View the [Asset Management](#) quick reference guide page for more information. This page includes a separate quick reference guide that describes processes for purchasing assets in the PO and Receipts modules.

Billing (BI)

Agency staff use the Billing module to enter and process bills for State of Minnesota customers.

Agency staff responsible for managing billing transactions uses this module. They may also be responsible for tracking receivables in the Accounts Receivable module.

Key Term	Description
Bill	A bill in SWIFT is also called an invoice. Outgoing bills are created in the billing module and provide information about the goods and/or services the State of Minnesota provided to a customer and the dollar amount owed for those goods and/or services.
Customer	Customers are external entities that purchase goods and services from State agencies. They are setup and maintained separately by each agency. Interagency customers are set up centrally by SWIFT Module Support. SWIFT stores customer information in both the Accounts Receivable and Billing modules.
Single Action Invoice Process	The Single Action Invoice Process (SAIP) combines several processes in a single job. SAIP generates finalized and printed invoices, create general ledger entries, and creates pending AR items.

View the [Billing](#) quick reference guide page for more information.

Commitment Control (KK)

The Commitment Control (KK) module is the Budget portion of SWIFT. It uses pre-encumbered, encumbered, expense, revenue, and budget ledgers to provide the budgetary controls the State of Minnesota requires. In the KK module, agency staff enter budget journals to establish expense and revenue budgets. Agency managers use KK to monitor and review Agency appropriation budgets.

Key Term	Description
Account	The Account ChartField classifies the nature of a transaction such as "cash" and "supplies." The values in this field determine whether it is an asset, liability, equity, revenue or expenditure.
Allotments	Allotments roll up from expense budgets to the Account Group Level (Payroll or Non Payroll).
Appropriations	Appropriations are the dollar amounts allocated by law or statute for a specific purpose.

Key Term	Description
Budget Journal	Agencies use budget journals to create expense budgets and revenue budgets and are needed before your agency can spend or receive money. Budget journals may also be used to enter dollar amount changes for an appropriation.
Budget Transfer	Agencies use budget transfers to transfer funds among appropriations. Budget transfers are also used to manually roll forward or back money between budget years within the same appropriation.

View the [Budget \(Commitment Control\)](#) quick reference guide page for more information.

EProcurement (EPro)

The EProcurement module helps agencies manage pre-encumbrances using requisitions. A requisition is an online form for requesting items or services. The EPro module allows for browsing and ordering directly from the catalogs in some supplier websites.

Agency staff responsible for ordering supplies from specific suppliers use this module. Also, staff who pre-encumber funds use it.

Key Term	Description
Budget Checking	Budget checking is the process of validating the requisition against the available budget as determined by ChartField information on the requisition.
Catalog Punchout	A Catalog Punchout Requisition allows requesters to create a requisition by browsing and ordering catalog items from some supplier websites.
Document Type	Document Type is a required field within the Procurement modules in SWIFT. This field differentiates among the functions for a requisition.
Pre-encumbrance	This is the amount that you expect to spend, but which you have no legal obligation to spend. A requisition is a typical pre-encumbrance transaction.

General Ledger (GL)

The SWIFT General Ledger (GL) module is the central repository for the State of Minnesota’s financial transactions. This module allows agency staff to create and manage journal entries in the General Ledger.

Agency staff responsible for creating and managing journal entries use this module. Agency staff who use inquires and reports on financial transactions may also use it.

Key Term	Description
Journal	A journal is a detailed account that records all financial transactions for the State. Staff use journal entries for reconciling of accounts and transferring transactions to other official accounting records, such as the General Ledger.
Ledger	A ledger is a set of posted balances that represent a set of books for a business unit. SWIFT's General Ledger supports detail, multiple and summary ledgers.
Ledger Group	This is a group of ledgers consisting of one primary ledger and any number of secondary ledgers.

View the [General Ledger](#) quick reference guide page for more information.

Grants Management (GM)

SWIFT offers two different processes to help agencies manage grants depending on who is the grantee. The Grants Management module is used only for incoming grants.

Incoming Grants: The State of Minnesota is the grantee.

Agency staff use the Grants Management (GM) module to document incoming awards that have already been granted by an outside organization, including federal government agencies, other state agencies, and non-profit groups. In the State of Minnesota, agencies that receive federal financial assistance must track all financial activity in SWIFT. Agencies use the Grants Management module to document awards and create at least one project and budget activity to track all costs associated to the grant. The Grants Management module works with Customer Contracts, Billing, Commitment Control, and Accounts Receivable modules.

Agency staff responsible for managing incoming grants use this module.

Key Term	Description
Activity ID	Activity IDs may represent specific tasks, items, or programs within a Project ID.
Customer Contract	This module uses customer contracts to assign billing schedules and rules to contract lines by creating billing plans. Billing plans are contract-specific.
Project ID	Project is the primary Project Costing ChartField used to capture additional information useful for grant and project accounting. The Project ID is the unique identification code for a particular initiative in an agency.
Proposal	Agencies use the Proposal to document awards that have already been granted to the State. The Proposal tracks information about the grant including the title, award sponsor, timeline, CFDA number, budget, any cost share, and other information to use for transactions.

View the [Grants \(Incoming\)](#) quick reference guide page for more information.

Outgoing Grants: The State of Minnesota is the sponsor and grant maker.

An outgoing grant is a class of contract which provides the transfer of cash or something of value to a recipient to support a public purpose authorized by law.

Agencies manage outgoing grants using separate procurement modules.

- Use the SWIFT Supplier Contracts module to enter the grant as a contract.
- Agencies must encumber grant funds in SWIFT prior to the execution of the grant agreement. Use the SWIFT Purchase Order module to encumber the funds for the contract.
- Use the SWIFT Accounts Payable module to pay the grantee from the purchase order.
- As an option, agencies can use the Strategic Sourcing module to solicit, review, and award proposals for the outgoing grant. The module creates a supplier contract record for the award.

One of the benefits of using SWIFT to enter grants is that transaction information for an outgoing grant can be viewed in any of these SWIFT modules.

Agency staff responsible for tracking encumbrances, purchases, and payments use the various modules to track outgoing grants.

View the [Grant Making](#) quick reference guides in the *General Procurement* webpage.

Procurement Card (Pcard)

A Procurement Card or Pcard allows agency staff to purchase items directly from suppliers using a credit card. The Pcard module enables agency staff to review, modify, and approve PCard transactions as well as to maintain cardholders profiles.

Agency staff responsible for administering, approving, reconciling, or reviewing PCard transactions use this module.

Key Term	Description
PCard Agency Administrator	The PCard Agency Administrator reviews, modifies, and approves transactions for cardholders and maintains cardholders profiles. This is a required role for all agencies. Each agency may have more than one PCard Agency Administrator. This role has agency-wide access to the various processes in this module.
PCard Approver	The PCard Approver approves PCard transactions for cardholders. This role is required for all cardholders who are responsible for viewing and approving PCard transactions and Chart of Account data.

Key Term	Description
PCard Reconciler	The PCard Reconciler reconciles PCard transactions for cardholders. This role is required for all cardholders who are responsible for reviewing PCard transactions and applying Chart of Account data to transaction lines.
PCard Reviewer	The PCard Reviewer reviews but does not update transactions for cardholders. Reviewers have the ability to add comments and attachments to transaction lines. They do not have the ability to apply Chart of Account data to transaction lines. This role is optional for agencies and is not required for cardholders.

Project Costing (PC)

Agencies use the Project Costing module to create, maintain, and close non-grant projects funded by the agency rather than a sponsor. Projects in the Project Costing module are used to perform cost collection only, and there is no need to bill. Most agencies require a project budget in this module.

Agency staff responsible for entering non-grant projects and activities, maintaining them, and closing them use this module.

Key Term	Description
Activity ID	Activity IDs represent specific tasks, items or programs within a Project ID.
Budget Check	This is the processing of source transactions against control budget ledgers. Transactions can pass, fail or pass with a warning. This process creates and relieves encumbrances and pre-encumbrances.
Project ID	Project is the primary Project Costing ChartField used to capture additional information useful for grant and project accounting. The Project ID is the unique identification code for a particular initiative in an agency.

Projects associated to an incoming grant should be created and maintained in the Grants Management module.

View the [Project Costing](#) quick reference guide page for more information.

Purchase Order (PO)

A purchase order is a SWIFT document that lists the goods and/or services to be purchased. The Purchase Order (PO) module provides the mechanism for the State to acquire and track goods or services. Agencies make purchases mainly through purchase orders and PCards.

Agency staff, such as buyers, responsible for entering and managing purchase orders use this module. Agency staff who document assets in SWIFT also use this module to add asset information to a purchase order.

Key Term	Description
Asset	An asset is any item that is owned by the State of Minnesota. Assets can be tangible such as computers, vehicles, or office equipment. They can also be intangible such as internally developed software, intellectual property and water or timber rights.
Budget Checking	Budget checking is the process of validating the purchase order against the available budget as determined by ChartField information on it.
Document Type	Document Type is a required field within the Procurement modules in SWIFT. This field differentiates among the functions for a purchase order.
Encumbrance	An encumbrance is a special type of accounting transaction that anticipates a future expenditure. Funds are encumbered, or set aside, in a particular appropriation budgetary account for a specific future purchase. The document used to record an encumbrance is a purchase order.

View the [Purchase Orders/Purchasing Assets](#) quick reference guide page for more information.

Receipts

Agencies use this module to track receipts of goods and or services. A purchase order receipt is SWIFT's documentation that the goods or services were received, either partially or fully. A receipt tracks the quantity or amount received against a purchase order. Once a receipt has been confirmed, agency staff can pay the supplier. Receiving includes determining if the purchase is an asset.

Agency staff responsible for receipts use this module. Typically, they can be in accounts payable or in an agency warehouse that receive and track goods. Agency staff who document the receipt of assets in SWIFT use this module to document the receipt of that asset.

Key Term	Description
Asset	An asset is any item that is owned by the State of Minnesota. Assets can be tangible such as computers, vehicles, or office equipment. They can also be intangible such as internally developed software, intellectual property and water or timber rights.

Key Term	Description
Purchase Order	A purchase order is a SWIFT document that includes a list of goods and/or services that are to be purchased.

View the [Receipts](#) quick reference guide page for more information.

Strategic Sourcing (SS)

The Strategic Sourcing module provides the mechanism to solicit bids for the purchase of goods or services following State statute and policy. The solicitation is called an event in SWIFT. It requests that bidders or suppliers accurately respond to the proposal requirements. It usually results in a supplier or suppliers receiving an award to a SWIFT contract or purchase order for goods or services.

Agency staff responsible for entering and managing events use this module.

Key Term	Description
Bid Factor	Bid factors are questions that bidders must answer about their products, services, or legal entity. They allow agencies to evaluate bids based on factors such as price, warranties offered, lead time, and product quality.
Bidder	A bidder is the legal entity that makes a formal offer on the event. In order to be awarded an event, all bidders must apply for and be a registered supplier.
Document Type	Document Type is a required field within the Procurement modules in SWIFT. This field differentiates among the functions for an event.
Ship To	Ship To represents where the service takes place. This a required field in this module.

View the [Strategic Sourcing](#) quick reference guide page for more information.

Supplier Contracts (SC)

The Supplier Contract module in SWIFT provides the mechanism for the state to create and manage supplier contracts. Agencies use this module to create and manage the contract record in SWIFT, which is the contract shell. Agencies also use this module to create and manage contract documents electronically through SWIFT. It uses a SWIFT-specific version of DocuSign.

Agency staff responsible for entering and managing contract shells use this module. Agency staff who process or manage contract documents through SWIFT also uses this module.

View the [Supplier Contracts](#) quick reference guide page for more information.

Suppliers

Suppliers are legal entities that provide goods and services to the State of Minnesota. They also include anyone who receives payments from the State. In some SWIFT modules, suppliers are known as “vendors.” Suppliers IDs are shared across all State agencies. All agency staff who enter supplier information in their modules must ensure they select the correct Supplier ID.

Supplier Administration

The Supplier Administration module allows State agency staff to perform searches, entry, and maintenance for suppliers on SWIFT.

- Agency staff can search for supplier information on the Review Suppliers page.
- Agencies can register suppliers, request address changes, edit some fields in the supplier record, and notify bidders to convert to registered suppliers for receiving awards in the Strategic Sourcing module.
- View the [Review Supplier Inquiry](#) quick reference guide page for more information.

Supplier Portal

- Suppliers can view their contracts, purchase orders, and payments through the Supplier Portal.
- The Supplier Support team approves registration and change requests for suppliers.
- Direct any questions from suppliers to the [SWIFT Vendor Resources](#) on Minnesota Management and Budget’s website.

SWIFT Help Resources

For further assistance with SWIFT, there are a variety of training and support resources available for State employees on MMB's webpages and inside the Administrative Portal.

SWIFT Help Desk

Contact the SWIFT Help Desk for any SWIFT-related questions or issues.

- Email: SWIFTHelpDesk.MMB@state.mn.us
- Phone: 651-201-8100, option 2
- Hours: 7:30 a.m. to 4:00 p.m., Monday through Friday (closed holidays)

When contacting the SWIFT Help Desk, make sure to include details about your question or issue including:

- Your Business Unit
- Description of the issue/question
- SWIFT Module (Accounts Payable, Purchase Orders, etc.)
- Transaction ID (Voucher ID, PO ID, etc.)
- Error message print screen

SWIFT Training and Support Resources

Quick reference guides provide brief procedures for a specific task in a SWIFT module or SWIFT basics. Find quick reference guides by module on the [Training Guides and Resources](#) page.

SWIFT training videos show you how to use SWIFT by SWIFT basics or module. You can find video tutorials on the [Training Videos](#) page.

REMINDER. You can find module-specific quick reference guides inside the SWIFT module using the Need Help? button. This button includes Help Desk contact information and common utilities.

SWIFT and EPM Data Warehouse Training

Enroll in online training for SWIFT and the EPM Data Warehouse for SWIFT in Learning Management. Webinars and labs run for 60 to 120 minutes. They include live demos of SWIFT and EPM Data Warehouse processes.

SWIFT training options are webinars. Some of the EPM Data Warehouse training are labs so that you can follow along.

SWIFT Updates and EPM Data Warehouse System Status Update

The SWIFT Updates newsletter provides news and updates about SWIFT from Minnesota Management and Budget, Administrative Department's Office of State Procurement, and MNIT.

The *EPM Data Warehouse System Status Update* communicates about scheduled data loads and subject areas that may be impacted.

You can sign up for these updates on MMB's [Email Lists](#) page. Select "Accounting – SWIFT Newsletter" and/or "Systems – EPM Data Warehouse."

EPM Data Warehouse Quick Reference Guides

The [EPM Warehouse Training](#) page provides quick reference guides for the Enterprise Performance Management (EPM) Data Warehouse financial, procurement, and Human Capital Management (HCM) reports. These guides are for agency staff who are either new to the EPM Data Warehouse or are experienced users who need to confirm or add to their knowledge.

Supplier Support for SWIFT

You can help suppliers with their questions related to their SWIFT Supplier Portal on the [SWIFT Vendor Resources](#) page. This page lists contact information based on the topic.