

## Project Costing Quick Start Guide

September 1, 2019

Starting in December 2019, there will be changes to SWIFT. While the new version will have a new look and feel, this upgrade will not affect how most processes are completed in SWIFT.

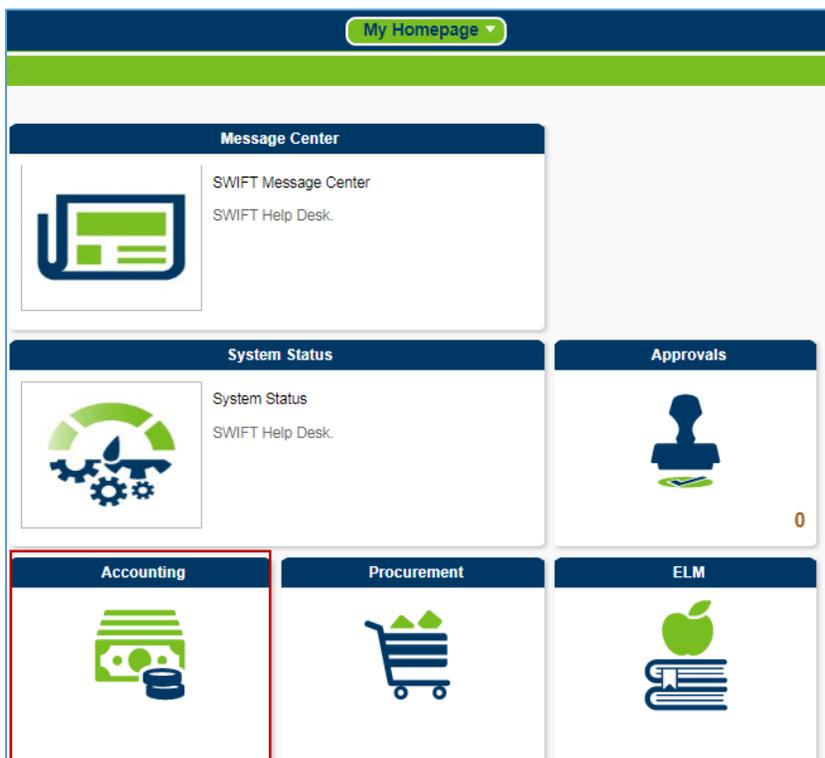
**Note:** There may be some changes to this information since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact us at: [SWIFT.project@state.mn.us](mailto:SWIFT.project@state.mn.us).

This guide covers how to navigate to Project Costing module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles. You may see more or fewer options than shown in this guide.

- Step 1: Navigate to the Project Costing Module
- Step 2: View Project Costing WorkCenter
- Step 3: View Project Costing Navigation Collections

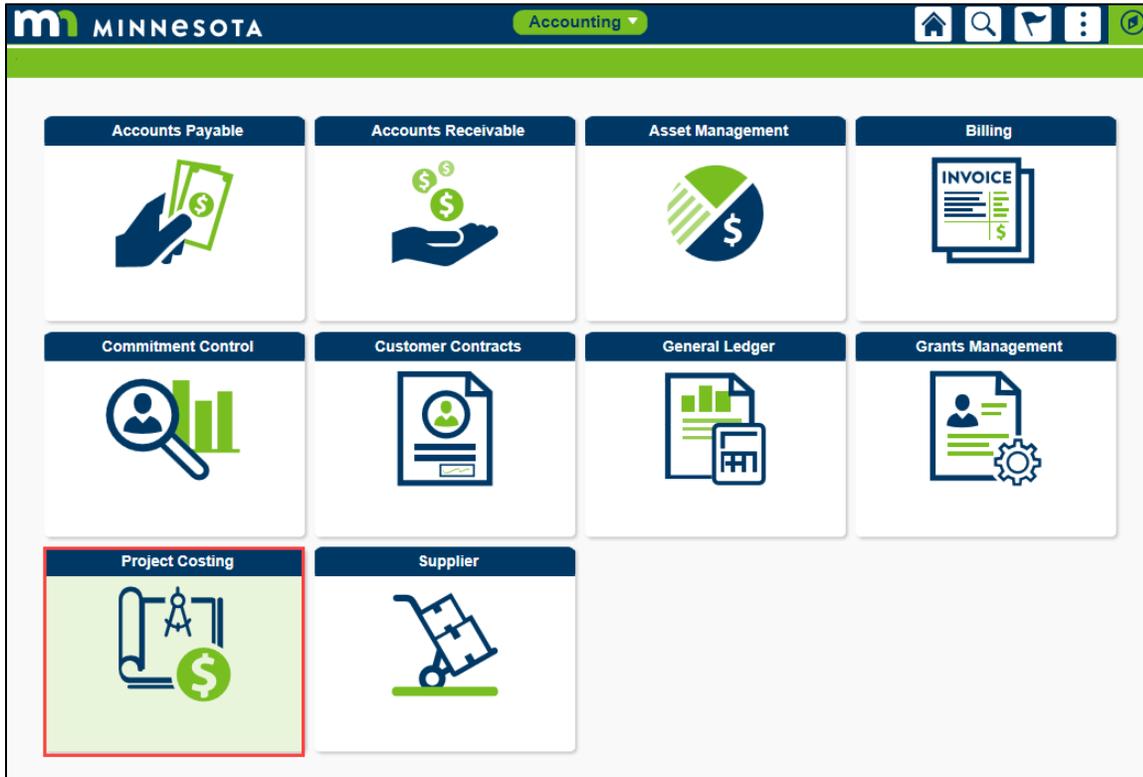
### Step 1: Navigate to the Project Costing Module

1. From **My Homepage**, select the **Accounting** tile.



# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

2. On the *Accounting* page, select the **Project Costing** tile.



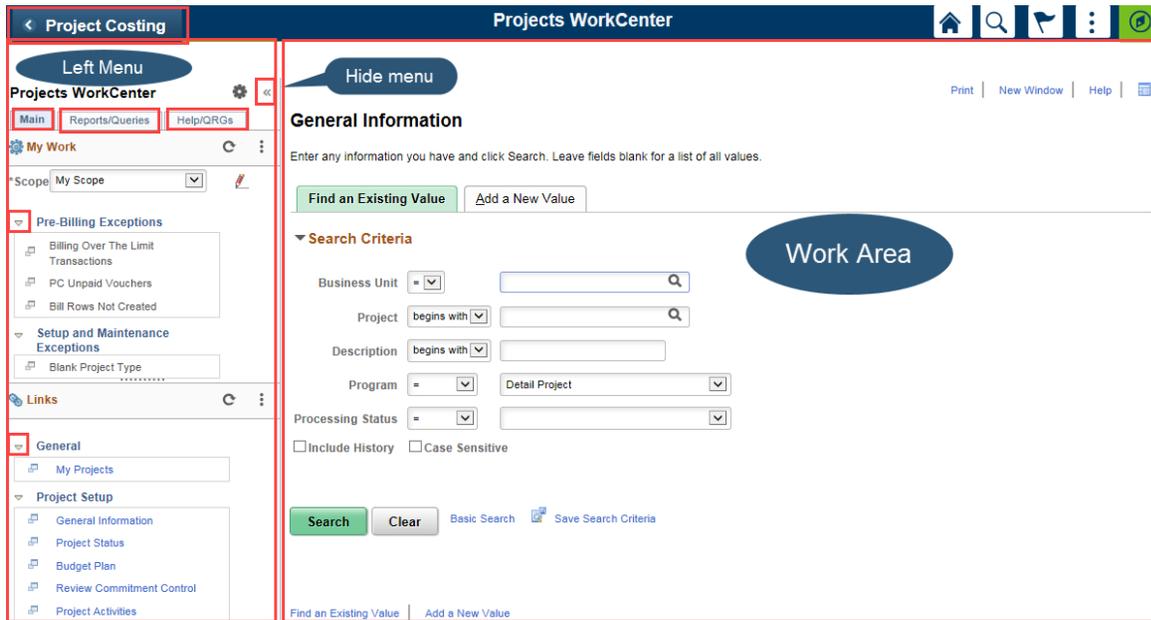
## Step 2: View the Project Costing WorkCenter

The Project Costing WorkCenter provides a centralized place where you can access frequently used pages, queries, processes, and reports.

1. Click on the **Project WorkCenter** tile.



- The Projects WorkCenter displays with the *Project General Information* page opened in the **Work Area** by default (right side page).



- The left menu includes the **Main, Reports/Queries, and Help/QRGs** tabs.
  - Click on the **Expand/Collapse** (⌵) drop-down arrow to hide or see options in the **Left Menu**.
  - Click on the **Hide Menu** (⌵) double-arrow in the header of the menu to hide the **Left Menu**.
- The **Left Menu** includes the **My Work, Links, Queries, Reports/Processes** and **Help/QRGs** sections with the folders and pages described below.

Left Menu Section	Description of Folders and Pages
<b>My Work</b>	The <b>My Work</b> section on the <b>Main</b> tab includes exception inquiries.
<b>Links</b>	The <b>Links</b> section on the <b>Main</b> tab includes links to frequently used pages, including: <ul style="list-style-type: none"> <li><b>General folder:</b> My Projects page.</li> <li><b>Project Setup folder:</b> Project -- General Information, Project Status, Budget Plan, Review Commitment Control, and Project Activities pages.</li> <li><b>Project Assets folder:</b> Pages used by agencies who send assets from Project Costing to the Asset Management module.</li> </ul>
<b>Queries</b>	The <b>Queries</b> section on the <b>Reports/Queries</b> tab includes links to queries related to project processing.
<b>Reports/Processes</b>	The <b>Reports/Processes</b> section on the <b>Reports/Queries</b> tab includes the Funds Distribution Report and access to the Process Monitor, Report Manager, and Query Viewer.

Left Menu Section	Description of Folders and Pages
Help/QRGs	The <b>Help/QRGs</b> tab provides access to Quick Reference Guides (QRGs) and SWIFT Help Desk contact information on the <b>Left Menu</b> . When you select a QRG, the pdf displays in a new window.

- To return to the **Project Costing** homepage, click on the **<Project Costing** back button on the top-left of page.

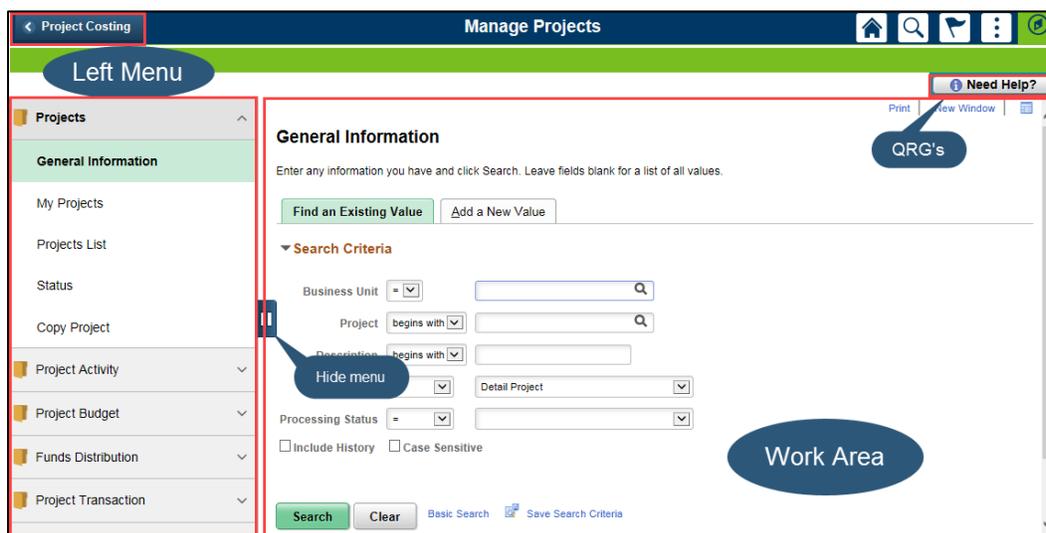
### Step 3: View the Project Costing Navigation Collections

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

- For example, select the **Manage Projects** navigation collection tile.



- Navigation collections also have a **Work Area** on the right and the **Left Menu**. You'll click on the drop-down arrows in the **Left Menu** to expand the menu of options.



# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- Here’s a listing of the navigation collections in the Project Costing module and a description of their use.

Navigation Collection	Description of Folders and Pages
<b>Projects</b>	<p>The <i>Project General Information</i> page opens by default. Folders and pages include:</p> <ul style="list-style-type: none"> <li>• <b>Projects:</b> Project General Information, My Projects, Projects List, Project Status, and Copy Project pages.</li> <li>• <b>Project Activity:</b> Activity Status, Activity General Information, and Project Activities pages.</li> <li>• <b>Project Budget:</b> Budget Detail and Budget Plan pages.</li> <li>• <b>Funds Distribution:</b> For MNDOT (T79) use only.</li> <li>• <b>Project Transaction:</b> Transaction List page.</li> </ul>
<b>Project Assets</b>	Only for use by agencies that send project transactions to Asset Management.
<b>Reports and Analysis</b>	Project-related reports.
<b>Project Processes</b>	Project-related processes.

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