

## **QUICK REFERENCE GUIDE**

June 24, 2024

### **Grants Management WorkCenter**

WorkCenters provide a centralized place where you can access frequently used pages, queries, processes, and reports. Options that you see in the WorkCenter depend on your security roles. You may see more or fewer options than shown in this guide.

The following Grants WorkCenter sections are covered in this Quick Reference Guide:

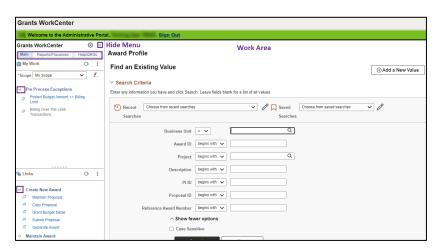
- **My Work**: Resolve Exceptions
- Links: Access Frequently Used pages
- Reports/Processes: Run Reports, Processes or Queries
- Help/QRGs: View Quick Reference Guides and SWIFT Help Desk Contact Information

#### Access the Grants WorkCenter

1. Navigate to the Grants WorkCenter.

Navigation Option	Navigation Path
Navigation Collection	Accounting, Grants Management, Grants WorkCenter.

2. The Grants WorkCenter displays with the Award Profile page opened in the Work Area by default, on the right side page.



- The left menu includes the Main, Reports/Processes, and Help/QRGs tabs
- Select the **Expand/Collapse** drop-down arrow to hide or see options in the left menu.
- Select the **Hide Menu** button to hide the left menu.

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### **My Work: View Exceptions**

1. The My Work section on the **Main** tab includes the Pre Process Exceptions inquiries described below. If the inquiry name is greyed out, no exceptions were found.

My Works Inquiry	Description
Posted Budget Amount <> Billing Limit	Provides a listing of active grants and shows exceptions where the "Posted Budget Amount" of an award does not equal the billing limit for the post award contract.
Billing Over The Limit Transactions	Lists grant transactions that are over the contract limit (Analysis Type: "OLT").

- When you select an inquiry, information is displayed on the General and Detail tabs.
- Select the Show All Columns icon to see all of the fields.
- Use the Arrows or **View** link on the right side to scroll through the rows of data.

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Main         Reports/Processes         Help/QRGs           My Work         O         :	Posted Bud	Posted Budget Amount <> Billing Limit			Concerning Refine Filter Criteria			
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	E, Q						< 1-10 of 300	✓ > >   View 100
₽ Posted Budget Amount ⇔ Billing Limit	General	Details II⊳						
Billing Over The Limit Transactions	Business Unit	Contract	Description	Awarding Sponsor	Entered Sponsor Budget Amount	Posted Budget Amount	Limit Amount	Currency
	E6001	000000001	John R Justice Program FY2012	US Department of Justice	140804.71	140722.00	140722.35	USD
	R2901	000000004	Monitoring for MN SWAP	US Fish and Wildlife Service	208000.00	238000.00	208000.00	USD

#### Links: Access Frequently Used pages

The Links section includes links to frequently used pages. Expand the folders listed below to access the pages:

- **Create New Award:** Maintain Proposal, Copy Proposal, Grant Budget Detail, Submit Proposal, and Generate Award pages.
- **Maintain Award:** Award Profile, Project General Information, Project Budgets, Customer Contract— General Information, and Commitment Control Errors.

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		٦	Business Unit	Contract	Description	Awarding Sponsor	Entered Sponsor Budget Amount	Posted Budget Amount	Limit Amount
Copy Proposal     Grant Budget Detail     Submit Proposal			E6001	000000001	John R Justice Program FY2012	US Department of Justice	140804.71	140722.00	140722.35
<ul> <li> <i>□</i> Generate Award <i>▽</i> Maintain Award         </li> </ul>			R2901	000000004	Monitoring for MN SWAP	US Fish and Wildlife Service	208000.00	238000.00	208000.00
Award Profile     Project General Information     Project Budgets	on		R2901	000000005	Statewide Technical Guidance f	US Fish and Wildlife Service	438750.00	520000.00	438750.00
Customer Contract - Gen Information			H1201	000000007	Lab Reimbursement - Environmen	POLLUTION CONTROL AGENCY	2886526.00		2886526.00

### **Reports/Processes: Run Reports, Processes or Queries**

The Reports/Processes tab includes reports, processes, or queries for grants. The **Reports/Processes** section includes the following options:

Reports/Processes Section	Description
Reports	Run the "Schedule of Expenditures of Federal Awards (SEFA) report. Refer to the <u>Run SWIFT SEFA Report</u> Quick Reference Guide for instructions.
Process Grant Billing	For use by agencies that process grant bills for reimbursement only. Refer to the Process Grant Bills for Reimbursement Quick Reference Guide for instructions
Monitor	Access the Process Monitor, Report Manager, and Query Viewer.

Grants WorkCenter O « Main Reports/Processes Help/QRGs	SEFA Report - Summary Detail
Reports/Processes O :	Find an Existing Value
	<ul> <li>✓ Search Criteria</li> <li>Enter any information you have and click Search. Leave fields blank for a list of all values.</li> <li>✓ Recent Choose from recent searches</li> <li>✓ ✓ ✓ Saved Searches</li> <li>✓ Searches</li> </ul>
Generate Conjuger Factor InfoCo     Reprint Invices     Monitor     P Process Monitor     Report Manager     Query Viewer	Search by: Run Control ID begins with Show more options Case Sensitive

The Queries section includes links to queries related to grant processing.

- When you select a query, the parameter page displays on the right where you can enter parameters and run the query.
- You can also access the Query Viewer page to run your favorite queries or search for any available query. The page is available in the Monitor folder under the Reports/Processes section.

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# Help/QRGs: View Quick Reference Guides and Help Desk Contact Information

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

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Main Reports/Processes Help/QRGs	SEFA Report - Summary Detail			
QRG - Grants WorkCenter 🕞 🗄	Find an Existing Value			
Grants Workcenter	✓ Search Criteria			
<b>b</b>	Enter any information you have and click Search. Leave fields blank for a list of all values.			
Grants Overview	🔁 Recent Choose from recent searches 🗸 🌶 💭 Saved Choose from saved searches 🗸 🌶			
Run SWIFT SEFA Rpt	Searches Searches			
SWIFT Help Desk O	Search by: Run Control ID begins with			
SWIFT Help Desk	$\checkmark$ Show more options			
Hours of Operation:	Case Sensitive			
7:30 a.m. to 4:00 p.m. Monday through Friday Closed holidays	Search Clear			
By Phone				
651-201-8100, option 2				
By Email				
swifthelpdesk.mmb@state.mn.us Contact the SWIFT Help Desk if you still have questions after reviewing the SWIFT <u>Training and</u> Support Resources page.				