QUICK REFERENCE GUIDE

Creating a Non-grant Project

June 14, 2012

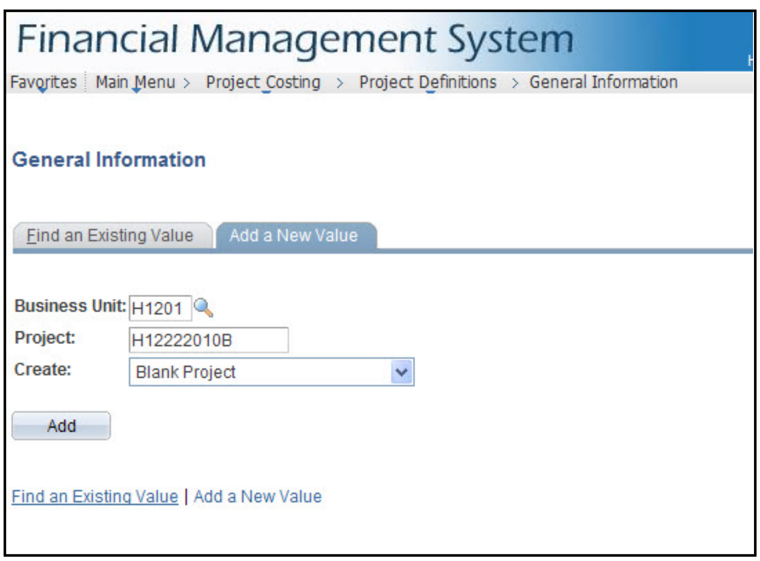
This Guide covers the steps to create a non-grant project in SWIFT. You would create a non-grant project when the project and activities are funded by the agency and not by a sponsor. All you need to do with the project is perform cost collection. There is no billing mechanism for reimbursement because there is no sponsor.

Steps to Create a Non-grant Project

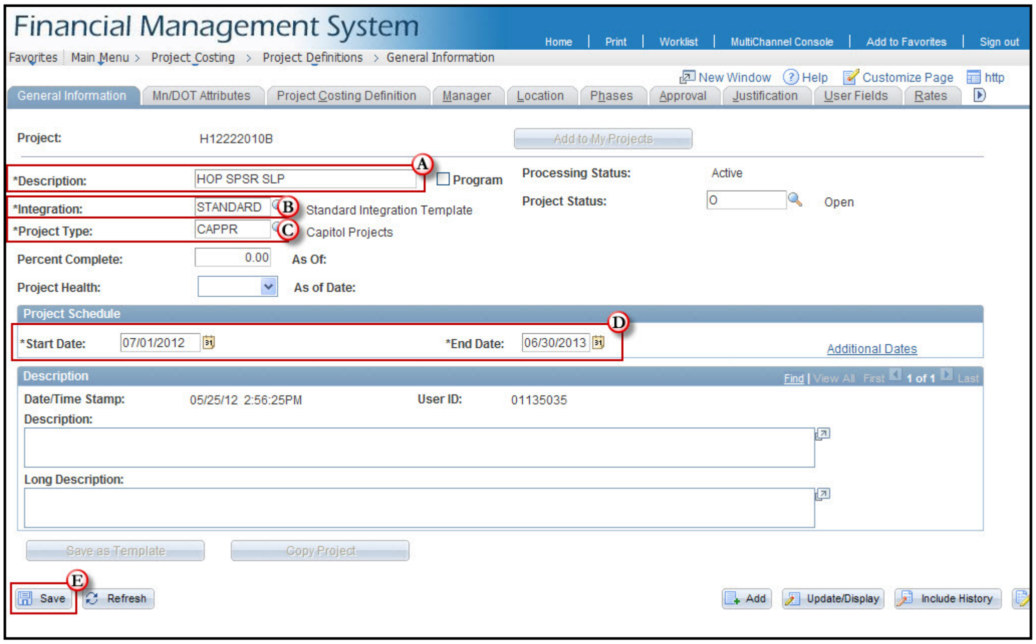
1. Enter project header (project general information page)
2. Add activities

Enter Project Header

Navigation: Project Costing, Project Definitions, General Information

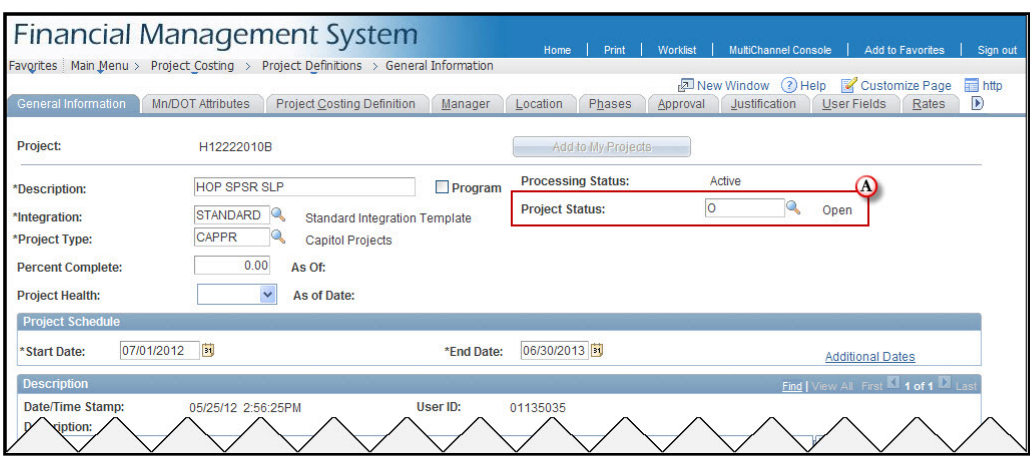


Enter your Project ID. All Project IDs should start with the agency mask. The agency mask is a three-character code that identifies the agency responsible for the project. It is usually the first three characters of the agency's Business Unit. The example used in this Guide starts with the agency mask H12.



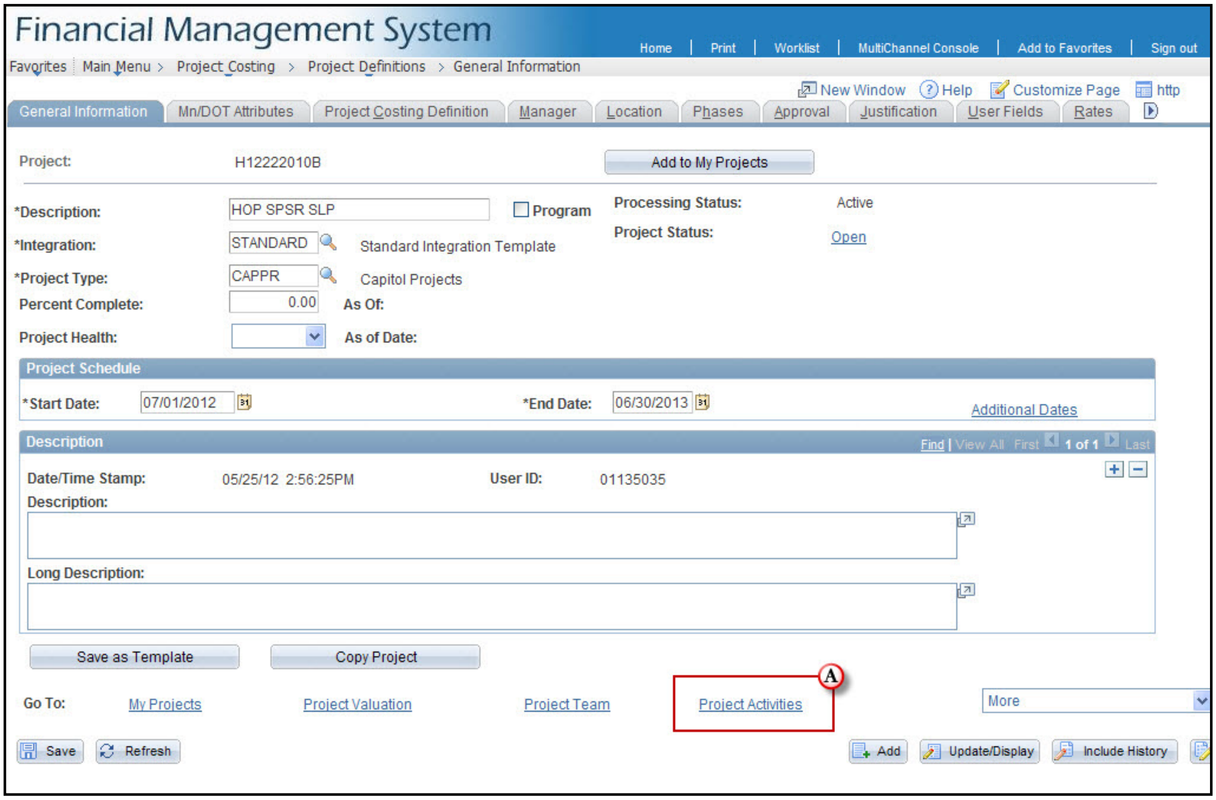
Complete the Project Header:

- Enter a description of the project **(A)**. This brief (20 characters) field is used to identify your project in search results and reports. You can enter a full description at the bottom of this page if you need to. A full description is not required.
- The Integration field **(B)** has only one valid value, "STANDARD."
- Enter the Project Type **(C)**. Many different project types may be used at your agency. Be sure to select the correct project type. This example uses a generic code (CAPPR) for agency-directed projects.
- Enter the project start and end dates **(D)**.
- Click the **Save** button **(E)**.

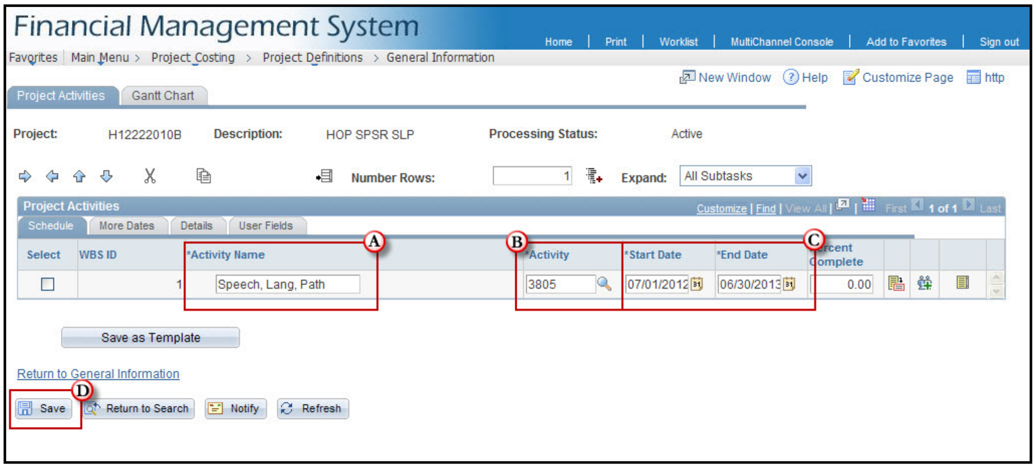


Note: The Project Status **(A)** defaults to “Open.” As long as the project is open, the Project ID and Activity IDs can be used as valid ChartField values, even if the project has not yet started. If you want to prevent this, you can change the status now to “Hold,” and then change it back to “Open” when the project actually starts, or when you want to be able to use the Project ID and Activity ID.

Enter Project Activities



After you click the **Save** button, SWIFT adds several project-related links at the bottom of the page. The next step to complete the new project is to add activities. Click the Project Activities link **(A)** to access the Project Activities page and add activities to the project.



Every project requires at least one activity. In this example, there is only one activity. For more information about adding multiple activities, see the Quick Reference Guide “Adding Multiple Activities to a Project.”

Complete the details for the activity:

- Enter the Activity Name **(A)**. The activity name should describe the activity clearly.
- Enter the Activity ID **(B)**. The Activity ID may vary depending on the agency. Some agencies use very specific activity IDs in order to track expenses at that level. Others just use activity 1, 2, etc.
- The Activity Dates **(C)** default to the project dates. When there is only one activity, the activity dates and the project dates must match. If your project has multiple activities, you may change the dates for activities as appropriate.
- Click the **Save** button **(D)**.

You now have a completed non-grant project. As long as the project status is “Open,” the Project ID and Activity ID can be used as valid ChartField values and the expenses associated with this project can be collected and tracked.

Some agencies require a project budget. Refer to the Quick Reference Guide **“Adding a Project Budget (Non-grant Projects)”** for details on this step.