

Add Projects and Activities

This guide covers adding projects and activities after the award has been generated. You start by adding a contract amendment in the Customer Contracts module. While it is possible to add the project and activities in the Grants Management Module and then associate them with an existing contract, it is much easier to create a contract amendment and begin the process in the Customer Contracts module. You can then add projects and activities from the contract pages. These link back to the Grants Management module. You also need to update the Budget Period date for the project and create the project budget.

WARNING! All components of the grant (the award, contract, and project) should be kept in sync. Updating one component and not updating another can lead to confusion and processing errors.

Step 1: Add a Contract Amendment

When you generate an award, SWIFT also creates a Customer Contract. This contract represents the relationship between the agency receiving the grant funds and the grant sponsor. The customer contract must be correct to bill the sponsor. Once the customer contract is in “Active” status, any change to the contract must be accompanied by a contract amendment.

1. Navigate to the **Award Profile** page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Maintain Award, Award Profile.

2. On the **Award Profile** search page, verify or enter the Business Unit.
3. Enter additional search criteria as needed to narrow your results.
4. Select the **Search** button.
5. Select the **Award ID** in the **Search Results** section.

Award Profile

Project

Project Activity

Project Budgets

Commitment Control Errors

Award Profile

Find an Existing Value

Search Criteria

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

Recent Saved

Searches Searches

Business Unit =

Award ID contains

Project begins with

Description begins with

PI ID begins with

Proposal ID begins with

Reference Award Number begins with

Search

Search Results

1 rows - Business Unit "G1001" Award ID "9950"

Business Unit	Award ID	Project	Description	PI ID	Proposal ID	Reference Award Number
G1001	0000009950	000000000001050	FEMA Training	00340679	0000009950	0000009188

6. The Award profile page displays. Select the **View Contract** link.

Award

[Funding](#) [Resources](#) [Certifications](#) [Terms](#) [Milestones](#) [Key Words](#) [Funding Inquiry](#)

Award ID

Reference Award Number Federal Award Identification Number

Title

Long Description

254 characters remaining

Award PI [Reporting Role](#)

Sponsor

Post Award Administrator

Purpose

Status

Award Type

CFDA

Proposal ID [View Proposal](#)

Version ID

Start Date

End Date

Hold Billing on Unpaid Cost

Hold Revenue on Unpaid Cost

[View Contract](#) [Contract Rates](#) [Additional Information](#) [Grant Administrator](#) [Sponsor Website](#)

Associated Project

Primary Project PI

PC Business Unit	Project	Description	Project Start Date	Project End Date	Commitment Control Begin Date	Commitment Control End Date
G1001	000000000001050	FEMA Training	07/01/2024	07/31/2026	07/01/2024	07/31/2026

- The contract General page displays. Note the current Contract Status and Amendment Number. Select the **Amend Contract** button.

General | Lines | Amendments

Contract Number 0000009950 Sold To Customer PUBLIC SAFETY DEPT

Amendment Number 0000000000 *Contract Status ACTIVE

Amend Contract Add to My Contracts

Description FEMA Training Processing Status Active

Contract Admin [Search] Amendment Status Complete

Region Code Business Unit Minnesota Management & Budget

Contract Type GRANTS Contract Classification Standard

Currency Code USD Start Date 07/01/2024

Exchange Rate Type CRRNT End Date 07/31/2026

Contract Signed 07/01/2024 Last Update Date/Time 08/08/2024 4:51:14PM

Contract Role Last Update User ID 00340679

Revenue Profile Separate Fixed Billing and Revenue:

Use Project ChartFields: Separate As Incurred Billing and Revenue:

- The contract's **Amendments** page displays. SWIFT automatically adds a new amendment row. Enter the amendment information as described below:

Field Name	Field Description
*Amendment Type	Select the "Change in Activities" Amendment Type from the drop-down menu.
*Reason	Select the Reason - Add Grant Activities. While available, the State of Minnesota does not use the "Reduce GR Activities" option. If you are no longer using a project or activity under a contract, the individual project or activity budgets should be reduced or redistributed, and the project/activity made inactive (closed). Likewise, any change in funding or time that results from this should have a corresponding contract amendment to adjust the contract accordingly.

- Select the **Save** button.
- A new amendment has been created in the "Pending" status. First make the project and activity changes in Steps 2 and 3 and then come back to this page to process the amendment in Step 4.

General | Lines | Amendments

Contract Number 0000009949 Sold To Customer PUBLIC SAFETY DEPT

Pending Amendment 0000000001 Contract Status ACTIVE

View Current

Amendments

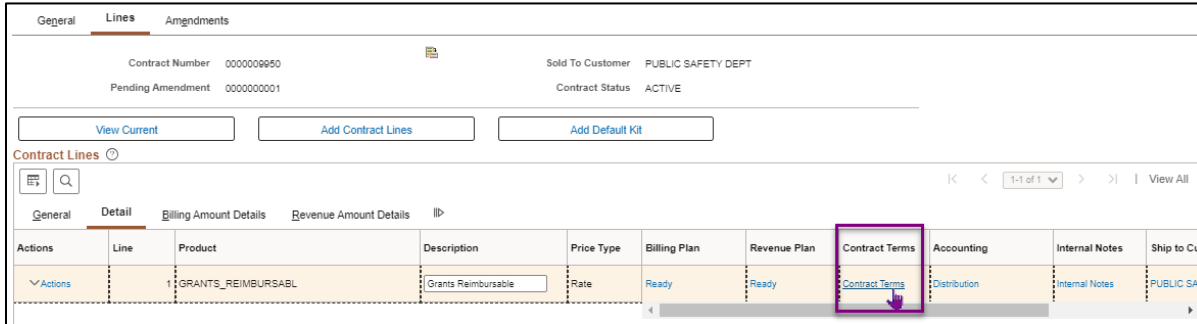
Amendment Type Reason Process Date Amendment Status Detail Notes

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000	Contract Activation		08/05/2024	Complete	Detail	Notes
0000000001	Change in Activities	Add Grant Activities	08/08/2024	Pending	Detail	Notes

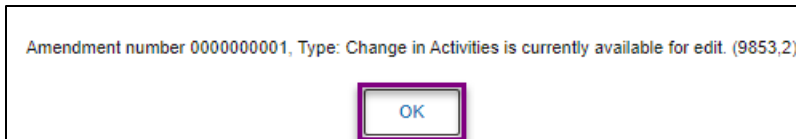
Save Return to Search Notify

Step 2: Add Projects

1. Select the **Lines** tab.
2. Select the **Detail** tab in the Contract Lines section.
3. Select the **Contract Terms** link.



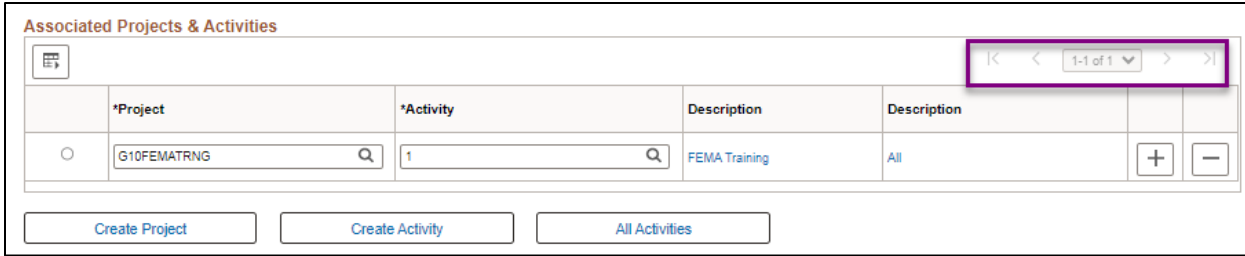
4. The Related Projects page displays. Verify that you are working on the pending amendment and not the current "Complete" version of the contract. If you are not on the amendment, select the **Amend Contract** button again.
5. A message displays indicating, "Amendment number 0000#####. Type: Change in Activities is currently available for edit." The amendment number should be the pending amendment number. Select the **OK** button.



6. You should now be working on the pending amendment as indicated by the term **Pending Amendment** with the amendment number in the header of the Related Projects page.



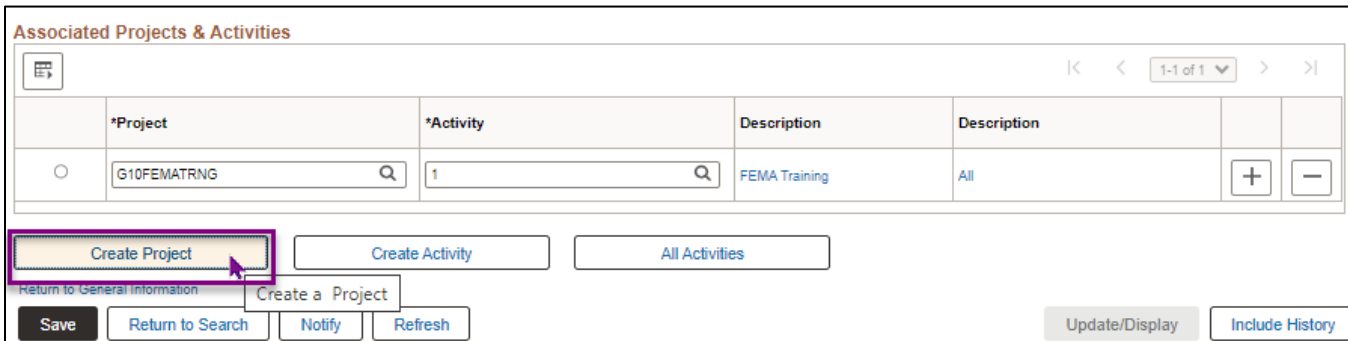
7. The Associated Projects and Activities section lists all projects that are currently associated with this contract. In this example, only one project is currently associated with the contract. If there are more, you can select the Arrow icons to navigate through the list or select "View All" to see all projects at once.



8. There are several actions you can take from this page:

Button	Action
Add (+)	You can select the Add (+) button in the Associated Projects & Activities section to add a new row and associate existing Projects and Activities to the Contract. It is possible to create Project and Activities in the Grant Module and then come to this page and associate them to the contract. However, MMB recommends adding new projects and activities from the contract using the process that follows. This ensures that the new projects/activities are associated with the contract and avoids SEFA reporting issues.
Create Project	Select this button to create a Project that is associated to the Contract. You are directed to the Project pages of the Grants Management module to make your entries.
Create Activity	Select the Project that you wish to add the Activity to and select this button to create the Activity that is associated to the Project and the Contract. You are directed to the Project Activity pages of the Grant Management module to make your entries.
All Activities	Select this button to add Activities that were created and added to the Project in the Grants Management module but have not yet been associated to the contract.

9. In this example, we demonstrate adding a new project and activity to the contract. Select the **Create Project** button.



10. The Add a New Value page for General Information displays. Accept the Business Unit.

11. Enter a valid ***Project ID**. Do NOT accept the default value "Next." Project IDs must begin with the first three digits of your Business Unit (your Agency Mask). For example, if your Business Unit is "G1001," the agency mask is "G10." Check with your agency for additional format requirements for the Project ID. Project IDs are an alphanumeric identifier with a 15-character limit.

Field Name	Field Description
Business Unit	Accept the Business Unit.
*Project ID	WARNING! You must overwrite the default system value (NEXT) with a valid Project ID. The Project ID must begin with the first three digits of your Business Unit (your Agency Mask). For example, if your Business Unit is “G1001.” your agency mask is “ G10. ” Check with your agency for additional format requirements for the Project ID. Project ID is a 15-character alphanumeric identifier.
*Create	Accept the default “Blank Project.”

12. Select the **Add** button.

The screenshot shows a web form titled "General Information" with a sub-header "Add a New Value". There is a search button "Find an Existing Value". Below are three input fields: "*Business Unit" with the value "G1001", "*Project" with the value "G10FEMATRNGT2T", and "*Create" with a dropdown menu showing "Blank Project". At the bottom left, there is an "Add" button highlighted with a red box.

13. The projects General Information page displays in a pop-up window. Complete the project **General Information** page as described below:

Field Name	Field Description
*Description	Enter the project description. SWIFT places a default in this field of “Grants Reimbursable.” If you forget to change it, you can later navigate to Project General Information page and edit the field there.
*Integration	Accept the default or use Lookup icon and select “STANDARD.”
*Project Type	Enter the Project Type. Select the option that describes the source of funding and how the revenue is classified. Available options vary by agency. Common options include: FED – 511001 Federal Revenue FEDSG– 511002 Federal Sub-Grants INTR1– 511101 Intergovtl Grants -- State INTR2– 511202 Intergovtl Grants – Other INTR3– 512605 Interagency Agreements OTHER– 511302 Other Revenue PRIVT– 511301 Private Grants Note: If you need a new project type setup, please contact the SWIFT Helpdesk.
Start Date and End Date	Enter the project Start and End Dates. These do not necessarily have to match the start and end dates of the current project(s) on the award/contract. However, if the start or end date for this new project is outside the date range of the award and contract, you first

	<p>must change the dates of the award and contract to match the dates for this project. SWIFT does not automatically do this for you. For example, if the award and contract end on June 30, and the new project ends on July 31, change the award and contract end dates to July 31 prior to adding the project.</p> <p>WARNING! The Start Date impacts the initial Project Status Effective Date which affects payroll processing and cannot be changed.</p> <p>Refer to the Add or Reduce Time to a Grant guide for instructions. In this example, the new project dates are within the current contract dates, so no additional changes are required.</p>
<p>Long Description</p>	<p>Optionally, enter a Long Description. This may be the same or different than the Long Description for the Proposal.</p>

14. Select the **OK** button.

The screenshot shows the 'General Information' form for project G10FEMATRNGT2T. The form is divided into several sections:

- General Information:** Includes fields for *Description (Reimbursable T2T training), *Integration (STANDARD), *Project Type (FED), Processing Status (Active), and Project Status (Open).
- Project Schedule:** Shows *Start Date (08/01/2024) and *End Date (10/01/2024).
- Description:** Contains a text area with 'Train the Trainer expenses' and a 'Long Description' field.
- Buttons:** At the bottom, there are buttons for 'Save as Template', 'Copy Project', and 'OK' (highlighted with a purple box), along with 'Cancel' and 'Apply'.

15. You are returned to the Contract Terms Related Projects page. The new project is listed in the **Associated Project & Activities** section.

The screenshot shows the 'Associated Projects & Activities' table. The table has the following structure:

	*Project	*Activity	Description	Description		
<input type="radio"/>	G10FEMATRNG	1	FEMA Training	All	+	-
<input checked="" type="radio"/>	G10FEMATRNGT21		Grants Reimbursable		+	-

Step 3: Add Project Activities

1. To add a new activity to the project, select the radio button next to the new project. If you want to add an existing Activity to the Project, select the Activity **Lookup** icon and select the Activity. Then proceed to Step 4 and process the amendment.
2. Select the **Create Activity** button.

3. The Activities/Resource pop-up window displays. Enter Activity information as described below.

Field Name	Field Description
*Description	Enter the activity Description. Check with your agency for requirements.
*Activity	Enter the Activity ID. Check with your agency for requirements.
Start Date and End Date	If your project has only one activity, as in this example, the activity dates must match the project dates. If you are adding multiple activities, you must have at least one activity that starts on the project start date, and at least one that ends on the project end date and there must be no gaps between activities.

4. Select the **OK** button.

5. You are returned to the Contract Terms Related Projects page. Select the **Save** button.

Related Projects Contract Amendments

Contract Number 0000009949 Sold To Customer PUBLIC SAFETY DEPT
 Pending Amendment 0000000001 Contract Status ACTIVE

Contract Line 1 Price Type Rate
 Product GRANTS_REIMBURSABL
 Description Grants Reimbursable

[View Current](#)

PC Business Unit G1001 Transaction Limits Review Limits
 Billing Limit 105,600.00 Perform Limit Checking
 Revenue Limit 105,600.00 Retainage ID
 Discount ID Tiered Pricing

Associated Rates

	Effective Date	Status	Rate Selection	*Rate Set		
1	01/01/1900	Active	Rate Set	REIMBURSE	Rate Set	+ -

Associated Projects & Activities

	*Project	*Activity	Description	Description		
	G10FEMATRNG	1	FEMA Training	All	+ -	
	G10FEMATRNGT21	2	Grants Reimbursable	All	+ -	

[Create Project](#) [Create Activity](#) [All Activities](#)

[Return to General Information](#) [Amount Allocation](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#)

Step 4: Complete Processing of the Amendment

1. Select the **Contract Amendments** tab to finish processing the amendment.
2. Select the **Detail** link for the Pending Amendment.

Amendments

General Statistics Billing Amended Amounts Revenue Amended Amounts Misc. | View All

Amendment	Amendment Type	Reason	*Process Date	Amendment Status	Detail	Notes
0000000001	Change in Activities	Add Grant Activities	08/08/2024	Pending	Detail	Notes
0000000000	Contract Activation		08/05/2024	Complete	Detail	Amendment Detail

3. On the Amendment Details page, verify that the **Amendment Type** and **Amendment Reason** are correct. You can change them on this page, if necessary.
4. Select "Ready" in the drop-down list for ***Amendment Status**.

Amendment Details

Contract 0000009949 Amendment Number 000000001
 Sold To Customer P070100001

Amendment Type Change in Activities
 Amendment Reason Add Grant Activities

*Process Date 08/08/2024
 *Amendment Status Pending
 Canceled
 Pending
 Ready

Total Billing Adjustment 0.00
 Fixed Billing Adjustment 0.00
 Fixed Billing Allocation Incomplete

Total Revenue Adjustment
 Fixed Revenue Adjustment 0.00
 Fixed Revenue Allocation Incomplete

> [Additional Amendment Details](#)

Note: When you change the Amendment status to “Ready” SWIFT locks the editable fields on the page, including the Type and Reason, and the **Process Amendment** button displays. If you realize there is an error, you can fix it by changing the Amendment status back to “Pending.” After you select the **Process Amendment** button in the next step, you cannot to make changes to this amendment. You must create a new amendment to make further changes or undo what you have done.

5. Select the **Process Amendment** button.

Amendment Details

Contract 0000009949 Amendment Number 000000001
 Sold To Customer P070100001

Amendment Type Change in Activities
 Amendment Reason Add Grant Activities

Process Date 08/08/2024
 *Amendment Status Ready

Process Amendment

Total Billing Adjustment 0.00
 Fixed Billing Adjustment 0.00
 Fixed Billing Allocation Incomplete

Total Revenue Adjustment 0.00
 Fixed Revenue Adjustment 0.00
 Fixed Revenue Allocation Incomplete

3. Notice “Complete” for the **Amendment Status**.
4. Select the **Return to Contract Terms** link at the bottom of the page to return to Contract Terms Related Projects page.

Amendment Details

Contract	0000009949	Amendment Number	000000001
Sold To Customer	P070100001	Amendment Completed On	08/08/2024 5:00PM
Amendment Type	Change in Activities	Process Date	08/08/2024
Amendment Reason	Add Grant Activities	Amendment Status	Complete
Total Billing Adjustment	0.00	Total Revenue Adjustment	0.00
Fixed Billing Adjustment	0.00	Fixed Revenue Adjustment	0.00
Fixed Billing Allocation	Incomplete	Fixed Revenue Allocation	Incomplete

> **Additional Amendment Details**

Reference ID	User Ref #1
	User Ref #2

Amendment Components

General Statistics

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value
1				

Return to Contract Terms [Internal Notes](#)

Save Return to Search Notify

Step 5: Add a Contract Note

1. To add contract note to describe the changes you made, return to the General Information page.
2. Select the **Amendments** tab.
3. Select the **Notes** link for the amendment.

<ul style="list-style-type: none"> Award Profile Project Project Activity Project Budgets Commitment Control Errors 	<p>General Lines Amendments</p> <p>Contract Number 0000009949 Sold To Customer PUBLIC SAFETY DEPT</p> <p>Amendment Number 000000001 Contract Status ACTIVE</p> <p>Amend Contract</p>																					
	<p>Amendments</p> <p>General Statistics Billing Amended Amounts Revenue Amended Amounts Misc.</p>																					
	<table border="1"> <thead> <tr> <th>Amendment</th> <th>Amendment Type</th> <th>Reason</th> <th>Process Date</th> <th>Amendment Status</th> <th>Detail</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>0000000001</td> <td>Change in Activities</td> <td>Add Grant Activities</td> <td>08/08/2024</td> <td>Complete</td> <td>Detail</td> <td>Notes</td> </tr> <tr> <td>0000000000</td> <td>Contract Activation</td> <td></td> <td>08/05/2024</td> <td>Complete</td> <td>Detail</td> <td>Notes</td> </tr> </tbody> </table>	Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes	0000000001	Change in Activities	Add Grant Activities	08/08/2024	Complete	Detail	Notes	0000000000	Contract Activation		08/05/2024	Complete	Detail	Notes
	Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes															
	0000000001	Change in Activities	Add Grant Activities	08/08/2024	Complete	Detail	Notes															
0000000000	Contract Activation		08/05/2024	Complete	Detail	Notes																

4. Complete the Notes page as described below:

Field Name	Field Description
*Component	Select "Amendments."
*Amendment Number	Select the Lookup and select the Amendment Number you created.
*Classification	Select "Custom."
*Text	Enter a note describing the change you made.

5. Select the **Save** button.

6. Select the **Return to General Information** link at the bottom of the page.

The screenshot shows the 'Notes' page for Contract 0000009949. Contract details include Sold To Customer P070100001, Business Unit G1001, Contract Status ACTIVE, and Currency Code USD. The contract is administered by PUBLIC SAFETY DEPT. The 'Notes Contents' section shows a form with the following fields: Component (Amendments), Amendment Number (0000000001), Classification (Custom), and Note Type. The text field contains 'Added a project and an activity to track Train the trainer expenses.' The page also shows '188 characters remaining', 'Last Update 08/08/24 5:24PM', and 'Last Changed By 00340679'. At the bottom, there are 'Return to General Information', 'Save', and 'Notify' buttons.

Step 6: Update the Budget Period Dates

Note: This step does not apply if you are only adding activities to an existing project.

1. Navigate to the Award Profile page using one of the options below:

Navigation Options	Navigation Path
--------------------	-----------------

Navigation Collection	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Maintain Award, Award Profile.

2. On the Find an Existing Value page for Award Profile, verify or enter your Business Unit.
3. Enter additional search criteria as needed to narrow your results.
4. Select the **Search** button.
5. Select the **Award ID** in the **Search Results** section.

Award Profile

Find an Existing Value

Search Criteria

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

Recent: Choose from recent searches | Saved: Choose from saved searches

Searches

Business Unit: [G1001] [Search]

Award ID: [contains] [9949]

Project: [begins with] [Search]

Description: [begins with] [Search]

PI ID: [begins with] [Search]

Proposal ID: [begins with] [Search]

Reference Award Number: [begins with] [Search]

Show fewer options

Case Sensitive

Search Clear Save Search

Search Results

2 rows - Business Unit "G1001" Award ID "9949"

Business Unit	Award ID	Project	Description	PI ID	Proposal ID	Reference Award Number
G1001	0000009949	G10FEMATRNG	FEMA Training	00340679	0000009949	0000009186

6. The Award Profile page displays. Select the **Funding** tab.
7. Navigate to the new project record by selecting on the **Arrow** or by selecting on the **View All** in the **Finding Info** section.

Funding Info

Project: G10FEMATRNG | Description: FEMA Training | Project PI

Detail

Period	*Start Date	*End Date	Funded Amount	To Project ID	Budget Posting Status	PC Distribution Status	Attachments
1	07/01/2024	07/31/2028	105,000.00	G10FEMATRNG	Posted	Distributed	Attachments

8. The ***Start Date** and ***End Date** fields are blank for the new project. Enter the same dates you used when setting up the new project and activity when completing the contract amendment.
9. Select the **Save** button.

The screenshot shows the 'Funding Info' interface. At the top, there are navigation controls including a search icon, a list icon, a dropdown menu showing '2 of 2', and a 'View All' link. Below this is a 'Detail' section with a search bar and a table. The table has the following columns: Period, *Start Date, *End Date, Funded Amount, To Project ID, Budget Posting Status, PC Distribution Status, and Attachments. The first row of the table has the following values: Period: 1, *Start Date: 08/01/2024, *End Date: 10/01/2024, Funded Amount: (blank), To Project ID: G10FEMATRNGT2T1, Budget Posting Status: None, PC Distribution Status: (blank), and Attachments: Attachments. Below the table, there are several tabs: 'Go To: Sponsor', 'Protocols', 'Attributes', 'Department Credit', 'Notepad', 'Award Modifications', and 'Supplemental Data'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Add', and 'Update/D'.

Step 7: Create Project Budget

1. Notice that the **Funded Amount** is blank.

This screenshot is identical to the previous one, but the 'Funded Amount' cell in the table is highlighted with a purple border to emphasize that it is currently blank.

2. You need to create a Project Budget for the new project. Generally, funding changes come from the Grantor, and what the Grantor dictates determine how a new project is funded.
 - a. If there are no additional funds to cover the cost of the new project, you can redistribute funds from the original project to the new project. Refer to the [Redistribute Project Budgets](#) guide for assistance.
 - b. If there are additional funds to cover the costs of the new project, add the new Project Budget, enter a Contract Amendment, and Update the Billing Limit. Refer to the [Add or Reduce Grant Funding](#) guide for detailed instructions.