SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Add Activities to a Project

This guide covers how to add additional activities to an existing non-grant project. You'll need to follow the instructions in this guide to add the activities and then refer to the "Adjust a Project Budget" guide to make changes to the project budget.

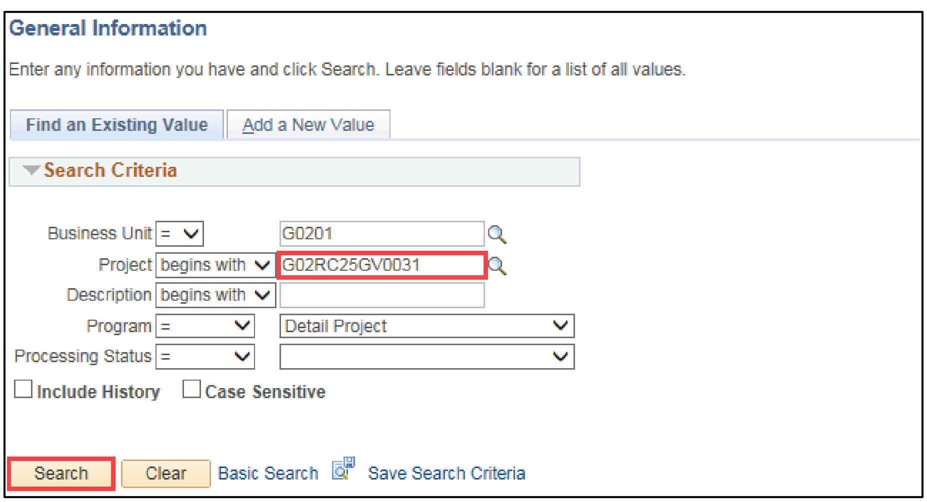
Steps to complete:

Step 1: Add Project Activities

1. Navigate to the Project *General Information* page by using one of the options below.

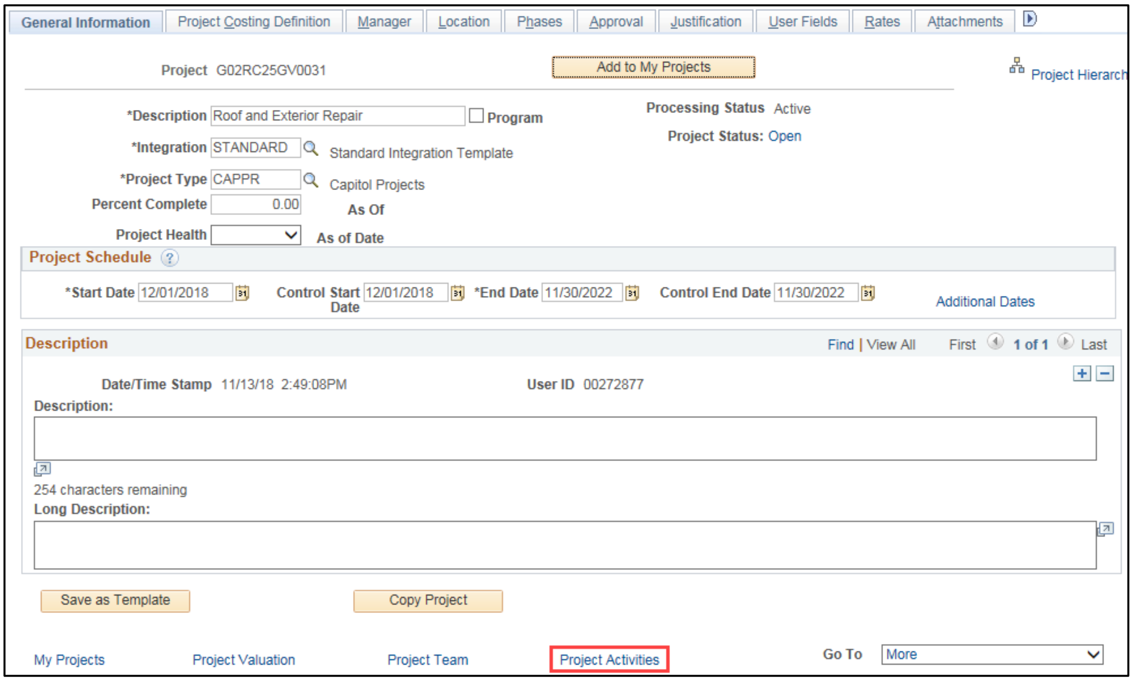
Navigation Options	Navigation Path
Navigation Collection	Accounting, Project Costing, Manage Projects. The General Information page displays by default.
WorkCenter	Accounting, Project Costing, Projects WorkCenter, left-menu, Links section, Project Setup, General Information.

2. On the *General Information* search page, verify the *Business Unit* and enter the *Project ID* for the project that needs the additional activity.

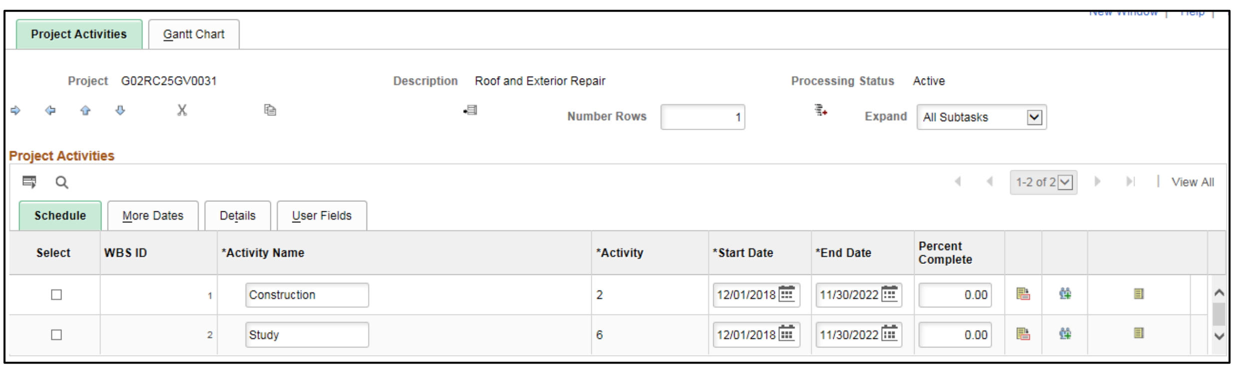


3. Click on the **Search** button and the *Project General Information* page displays.

4. Click on the *Project Activities* link displayed at the bottom of the page in the **Go To** section.



- The **Project Activities** tab displays with the activities currently attached to the project. In this example, the project has two activities.

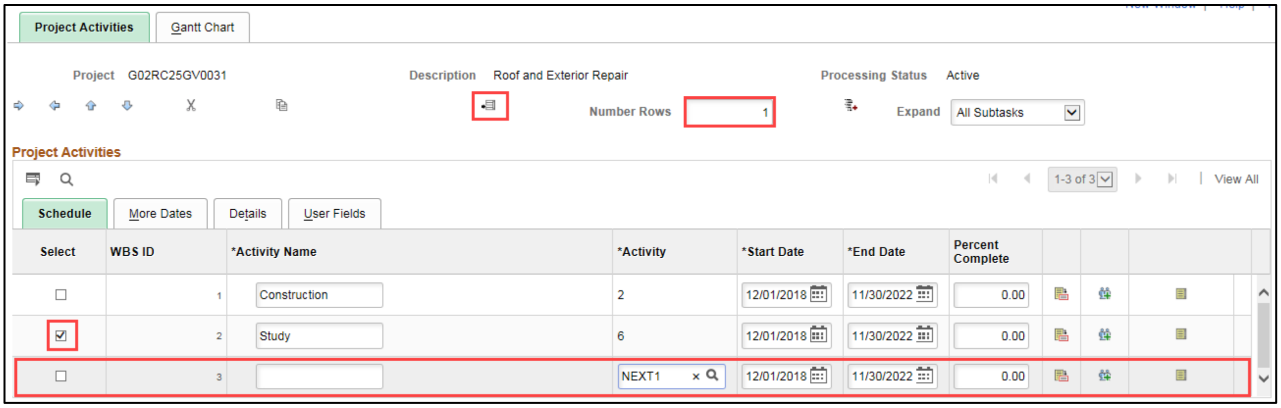


5. Enter the number of additional activity rows you need to add in the **Number Rows** field located in the header of the page.

   WARNING! This is the number of new rows that you need to add, not the total number of rows you need. If you add rows you don't need, you cannot delete them. If you add activity rows in error, you should exit the *Project Activities* page without saving (click on the *Return to General Information* link and click "**Cancel"** to exit without saving). From the *Project General Information* page, click on the *Project Activities* link and start over.

6. Next, you'll need to tell SWIFT where to add the new rows by clicking on the **Select** checkbox next to an existing activity. The new row(s) will be added after the activity you selected.

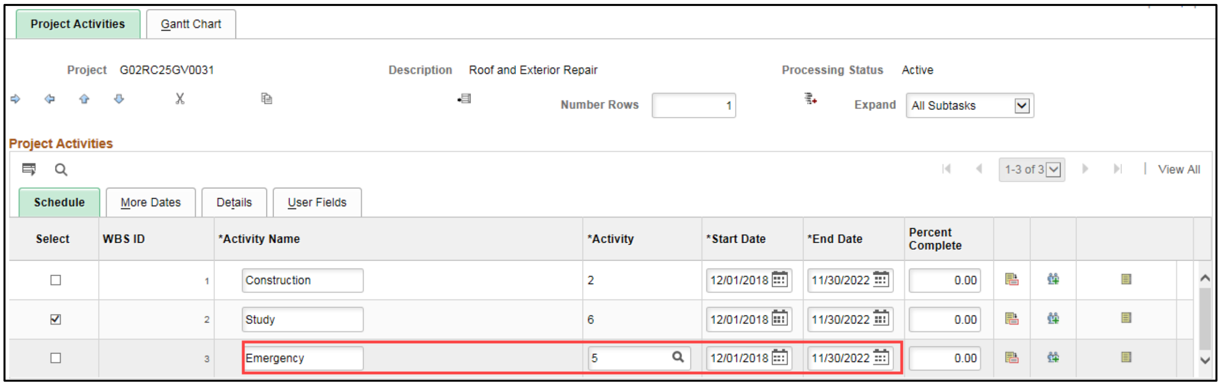
7. Click on the **Add** ( ) icon to the left of the **Number Rows** field. The new rows are inserted after the selected row.



8. Complete the **Project Activities** section detail as described below.

Field Name	Field Description
***Activity Name**	Enter the Activity Name. The field length is 30 characters.
***Activity**	Overwrite the default system value “NEXT” with the *Activity ID*. Follow your agency’s convention for completing this field. Some agencies use very specific *Activity IDs* in order to track expenses at that level. Others just use activity 1, 2, etc. This becomes the Activity ChartField value. The field length is 15 characters.
Start Date and End Date	The Activity *Start Date* and *End Date* defaults to the *Start Date* and *End Date* of the Project. If there is only one activity, the activity *Start* and *End Date* must match the project *Start* and *End Date*. If your project has 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.
Percent Complete	State of Minnesota does not use.
Activity Definition	If you click on the *Activity Definition* icon ( ) you are brought to the *Project Activities General Information* pages where you can add additional information about the *Activity*, if your agency requires. The options available are similar to the *Project General Information* pages. Click on the *Return to Project Activities* link to return to the *Project Activity* pages.
Transfer to Resource	State of Minnesota does not use the Transfer to Resource ( ) option.
Project Transaction List	State of Minnesota does not use.

Note: The **User Fields** tab provides fields that can be used at your agency’s discretion. Check with your agency to determine if these fields are used. Minnesota does not use the detailed activity tracking that can be accommodated by the **More Dates** and **Details** tabs in the **Project Activities** section or the **Gantt Chart** tab at the top of the page.



9. **WARNING**! Double-check your entries before saving, especially the *Activity ID*(*s*). After you save, you will not be able to change the *Activity ID* field(s). Click on the **Save** button.
10. If your agency requires you to enter a project budget, refer to the "Adjust a Project Budget" guide for instructions. You may need to have additional project budget to enter for the new activity or you may need to reduce an existing budget and add it to the new activity.