SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

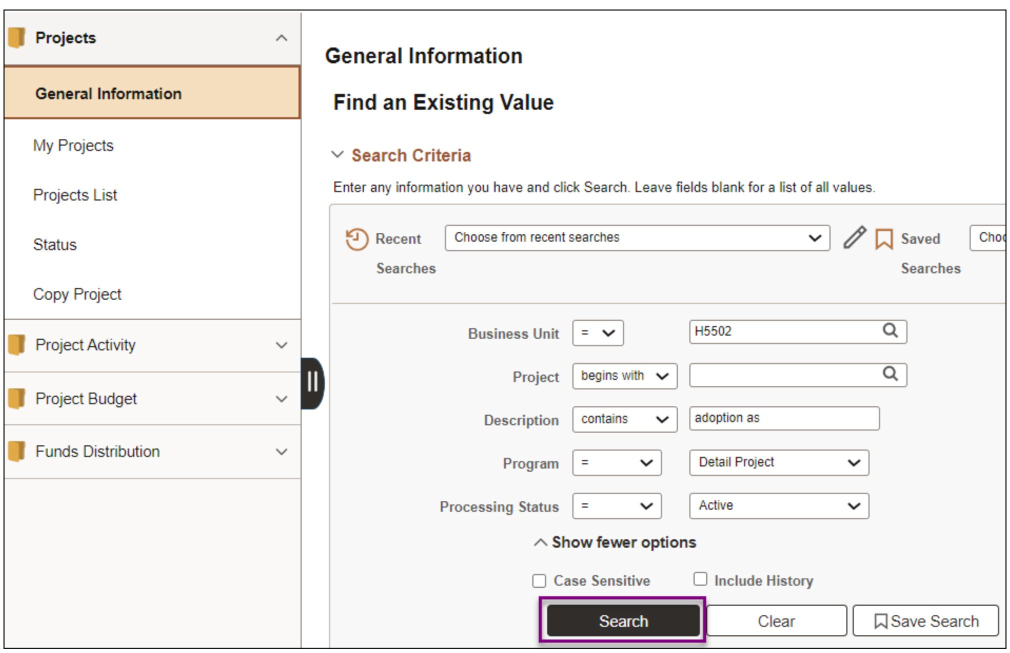
Add Activities to a Project

This guide covers how to add additional activities to an existing non-grant project. After adding activities, refer to the "Adjust a Project Budget" guide to make changes to the project budget.

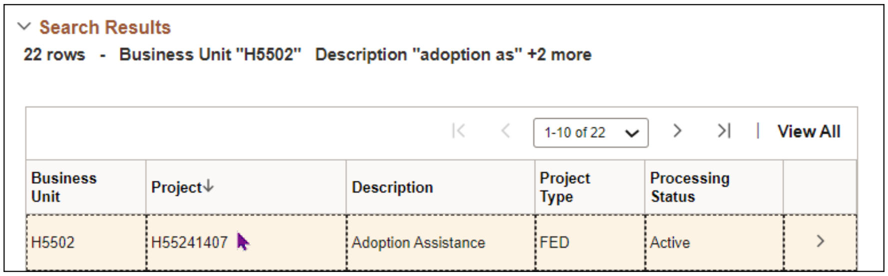
1. Navigate to the Project General Information page by using one of the options below.

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.

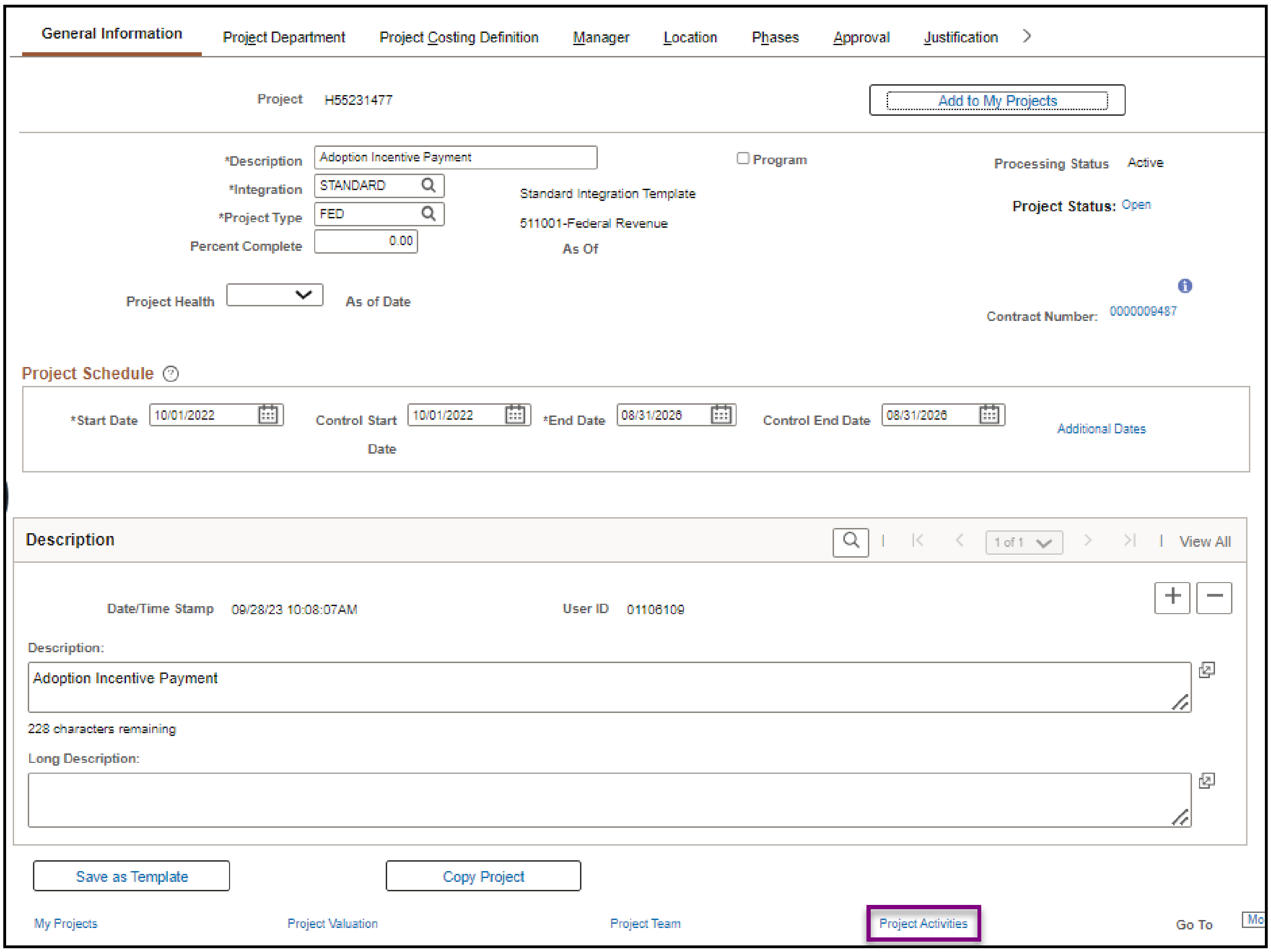
2. At the General Information page, enter your Business Unit and additional search criteria to locate the project you want to update.
3. Select the **Search** button.



4. Select the project in the **Search Results** section.

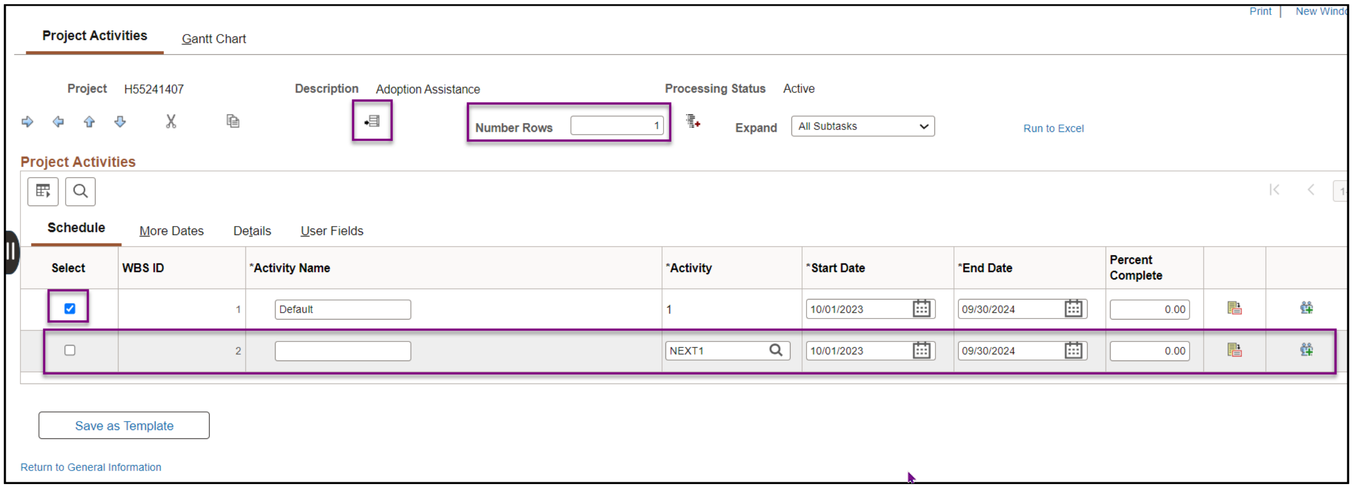


5. The General Information page displays. Select the **Project Activities** link displayed at the bottom of the page in the **Go To** section.



6. The Project Activities tab displays with the activities currently attached to the project. Enter the number of **additional** activity rows you need to add in the **Number Rows** field. **Warning!** You cannot delete activity rows once you add them. If you add activity rows in error, exit the Project Activities page without saving (select the Return to General Information link and select “No**”** to discard the changes).
7. Next, you’ll need to tell SWIFT where to add the new rows by selecting on the **Select** checkbox next to an existing activity. The new row(s) will be added after the activity you selected.

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

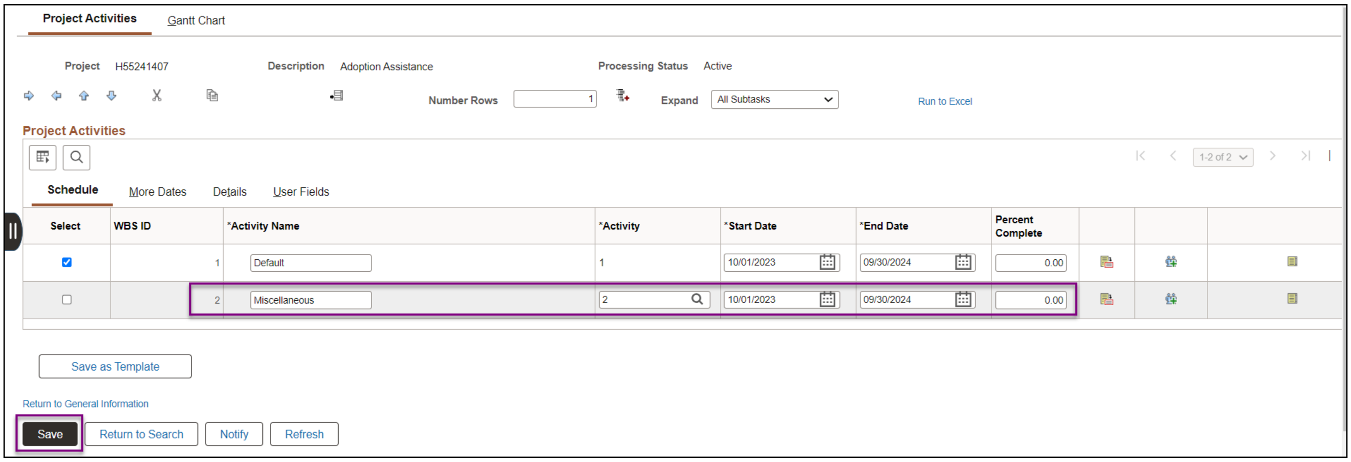


9. Complete the **Project Activities** section detail as described below.

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 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.
Activity Definition	If you select 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 like the Project General Information pages. Select the Return to Project Activities link to return to the Project Activity pages.

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.

10. **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). Select the **Save** button.



11. 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.