

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.

The screenshot shows the 'General Information' page for a project. On the left is a navigation menu with options: Projects, General Information (selected), My Projects, Projects List, Status, Copy Project, Project Activity, Project Budget, and Funds Distribution. The main content area is titled 'General Information' and 'Find an Existing Value'. It features a 'Search Criteria' section with a prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are several search filters: 'Recent' (with a dropdown 'Choose from recent searches'), 'Saved' (with a dropdown 'Choose from saved searches'), 'Business Unit' (set to '= H5502'), 'Project' (set to 'begins with'), 'Description' (set to 'contains adoption as'), 'Program' (set to '= Detail Project'), and 'Processing Status' (set to '= Active'). There are also checkboxes for 'Case Sensitive' and 'Include History'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and a 'Save Search' button.

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

▼ Search Results
22 rows - Business Unit "H5502" Description "adoption as" +2 more

<div> <div><</div> <div><</div> <div>1-10 of 22</div> <div>></div> <div>></div> <div>View All</div> </div>					
Business Unit	Project	Description	Project Type	Processing Status	
H5502	H55241407	Adoption Assistance	FED	Active	>

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

General Information

Project Department

Project Costing Definition

Manager

Location

Phases

Approval

Justification

Project H55231477

Add to My Projects

*Description

Adoption Incentive Payment

*Integration

STANDARD

*Project Type

FED

Percent Complete

0.00

Project Health

As of Date

Standard Integration Template

511001-Federal Revenue

As Of

Processing Status

Active

Project Status:

Open

Contract Number:

0000009487

Project Schedule

*Start Date

10/01/2022

Control Start

10/01/2022

*End Date

08/31/2026

Control End Date

08/31/2026

Additional Dates

Description

Date/Time Stamp

09/28/23 10:08:07AM

User ID

01108109

Description:

Adoption Incentive Payment

228 characters remaining

Long Description:

Save as Template

Copy Project

My Projects


Project Valuation

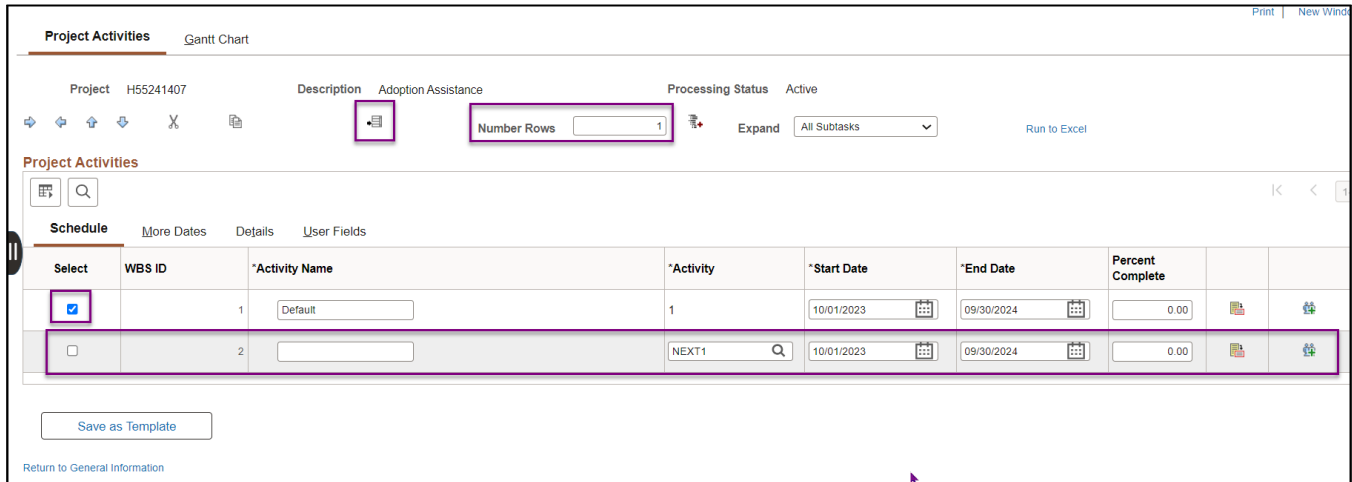
Project Team

Project Activities

Go To


- 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).
- 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.

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



The screenshot shows the 'Project Activities' section. At the top, there are tabs for 'Project Activities' and 'Gantt Chart'. Below the tabs, there's a header area with 'Project H55241407', 'Description Adoption Assistance', and 'Processing Status Active'. There are several icons and a 'Number Rows' field set to 1. The 'Add' icon is highlighted. Below this is a table with columns: 'Select', 'WBS ID', '*Activity Name', '*Activity', '*Start Date', '*End Date', 'Percent Complete', and icons. The first row is selected. The 'Add' icon is highlighted. Below the table is a 'Save as Template' button and a 'Return to General Information' link.

- 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.

The screenshot shows the 'Project Activities' interface. At the top, there are tabs for 'Project Activities' and 'Gantt Chart'. Below the tabs, there are fields for 'Project' (H55241407), 'Description' (Adoption Assistance), and 'Processing Status' (Active). There are also icons for adding, deleting, and refreshing, a 'Number Rows' field set to 1, an 'Expand' button, and a dropdown for 'All Subtasks'. A 'Run to Excel' link is also present.

Below this, there is a 'Project Activities' section with a search bar and a table. The table has columns: 'Select', 'WBS ID', 'Activity Name', 'Activity', 'Start Date', 'End Date', 'Percent Complete', and three empty columns. The first row has '1' in the 'WBS ID' column, 'Default' in the 'Activity Name' column, '1' in the 'Activity' column, '10/01/2023' in the 'Start Date' column, '09/30/2024' in the 'End Date' column, and '0.00' in the 'Percent Complete' column. The second row has '2' in the 'WBS ID' column, 'Miscellaneous' in the 'Activity Name' column, '2' in the 'Activity' column, '10/01/2023' in the 'Start Date' column, '09/30/2024' in the 'End Date' column, and '0.00' in the 'Percent Complete' column. The second row is highlighted with a purple border.

Below the table, there is a 'Save as Template' button. At the bottom left, there is a 'Return to General Information' link and a 'Save' button highlighted with a red border. Other buttons at the bottom are 'Return to Search', 'Notify', and 'Refresh'.

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.