

QUICK REFERENCE GUIDE

February 20, 2024

Close or Reopen Projects

After all costs have been processed, including the General Ledger journals for those items, the project should be closed (inactivated).

Closing or reopening a project involves changing the Project Status. When you change the Project Status to “Closed”, the project is inactivated, and no transactions can be processed for the project. In order to process additional transactions for the project, you would need to change the Project Status back to “Open.”

Before changing the Project Status to “Closed”, you may want to use the “Pending Close” status to limit the transactions that can be processed for the project. A complete Status listing is provided in this guide.

Step 1: Update the Project Status

1. Navigate to the Project General Information page 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, Project 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 sidebar with a 'Projects' menu and sub-items like 'General Information', 'My Projects', 'Projects List', 'Status', and 'Copy Project'. The main area is titled 'General Information' and 'Find an Existing Value'. It features a 'Search Criteria' section with a prompt to 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are several search filters: 'Business Unit' (set to H5502), 'Project' (begins with), 'Description' (contains), 'Program' (Detail Project), and 'Processing Status' (Active). There are also checkboxes for 'Case Sensitive' and 'Include History'. At the bottom, there are buttons for 'Search' (highlighted with a red box), 'Clear', and 'Save Search'.

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	>

5. The Project General Information page displays showing the current Project Status. To change the Project Status, select the hyperlink of the current Project Status.

General Information | Project Costing Definition | Manager | Location | Phases | Approval | Justification | User Fields | Rates >

Project H55241407 [Add to My Projects](#)

*Description Adoption Assistance ☐ Program Processing Status Active

*Integration STANDARD Standard Integration Template

*Project Type FED 511001-Federal Revenue

Percent Complete 0.00 As Of

Project Health As of Date

Project Status: Open

Contract Number: 0000009590

6. The Status page displays, showing the current Status and the Effective Date when that Status was activated. Status changes are maintained in separate rows. This enables SWIFT to maintain a history of the Project Status.
7. To change the Status, select the **Add New Row (+)** icon.

Status

Project H55241407 Description Adoption Assistance

Project Status | | | 1 of 1 | View All

Effective Date 10/01/2023 Sequence 0 **+**

*Status Open

Priority 0

Interest Calculation Factor 0.00

Comments

[Return to General Information](#)

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

8. A new row is added. Notice that the new row is row 1 of 2 and the fields are now open to edit.
9. By default, the Effective Date is the current date. You can change the Effective Date to a future date for the status change.
10. Select the **Status Lookup** icon to select a new status. Status. Status Codes are described below. In this example, we select “X – Pending Close” for the new status.

Status	Description
C - Closed	Process Status: Closed/Inactive. When a project is closed, it is not available for selection or processing.
O - Open	Process Status: Open/Active
P - Pending	WARNING! Don't Use. Projects start with a pending status but cannot be changed to this status.
H - Hold	Process Status: Inactive. When a project is on hold, you cannot process transactions for the project.
X – Pending Close	Process Status: Active. This status allows General Ledger and Accounts Payable transactions only to be applied to the contract. Requisitions or Purchase Orders cannot be created for a project in Pending Close status. This does not prevent transactions from being processed in Billing and Accounts Receivable modules.
Z – Pending Close – GL Only	Process Status: Active. This status allows only General Ledger transactions to be applied to the project; this does not include payroll journals from SEMA4. Vouchers, purchase orders, and requisitions are also not allowed to be entered. This may be used for end-of-year adjustments to be made in the General Ledger or for the creation of GL journals from module transactions on the last day of the projects. This does not prevent transactions from being processed in the Billing and Accounts Receivable modules.

11. Optionally, enter a Comment.
12. Select the **Save** button.

Status

Project H55241407

Description Adoption Assistance

Project Status

1 of 2

View All

Effective Date 02/13/2024

*Status X

Priority 0

Interest Calculation Factor 0.00

Comments Sample Comments

Sequence 0

Pending Close

Return to General Information

Save

Return to Search

Previous in List

Next in List

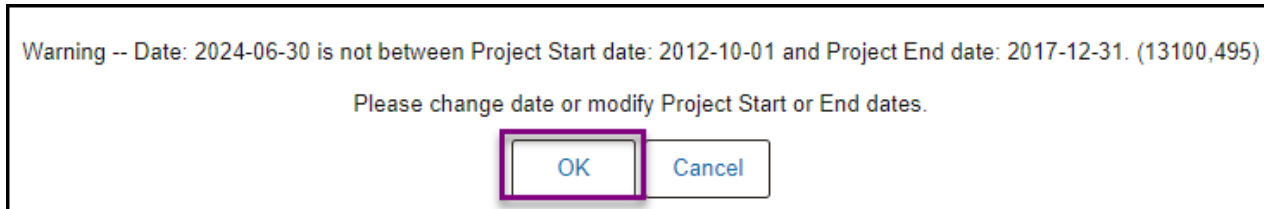
Notify

Refresh

Update/Display

Include History

13. If you entered a status with a date outside of the Project Start and End Date, you will receive a warning; however, you will be able to save the status.



14. Select the Return to General Information link to return to the **General Information** page of the Project. The project General Information page now reflects the new Project Status.

General Information		Project Costing Definition	Manager	Location	Phases	Approval	Justification	User Fields	Rates	>
Project		H55241407								
		Add to My Projects								
*Description	Adoption Assistance				<input type="checkbox"/> Program		Processing Status		Active	
*Integration	STANDARD		Q		Standard Integration Template					
*Project Type	FED		Q		511001-Federal Revenue					
Percent Complete	0.00									
								Project Status:		Pending Close