

QUICK REFERENCE GUIDE

November 1, 2019

Close or Reopen Projects

After all of the costs have been processed through, 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 will 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.

Steps to complete:

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, verify the *Business Unit* and enter the *Project ID* for the project you want to update.

General Information

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

▼ **Search Criteria**

Business Unit =

Project begins with

Description begins with

Program =

Processing Status =

Include History Case Sensitive

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3. Click on the **Search** button.
4. Select the project in the **Search Results** section, if necessary.
5. The *Project General Information* page displays showing the current *Project Status*. In this example, the *Project Status* is “Open”.

The screenshot shows the 'Project General Information' page for project G02RC25GV0031. The page includes tabs for various sections: General Information, Project Costing Definition, Manager, Location, Phases, Approval, Justification, User Fields, Rates, and Attachments. The main content area displays project details: Description (Roof and Exterior Repair), Processing Status (Active), Project Status (Open), Integration (STANDARD), Project Type (CAPPR), Percent Complete (0.00), and Project Health. Below this is the 'Project Schedule' section with fields for Start Date, Control Start Date, End Date, and Control End Date. The 'Description' section shows a date/time stamp and user ID, followed by a text area for the project description.

6. To change the *Project Status*, click the link that indicates the current *Status*. The *Status* page displays, showing the current *Status* and the *Effective Date* when that *Status* was activated. The *Status* changes are maintained in separate rows. This enables SWIFT to maintain a history of the project *Status*.
7. To change the *Status*, click on the **Add New Row (+)**. A new row is added.

The screenshot shows the 'Project Status' page for project G02RC25GV0031. The page displays the current status 'Open' and the effective date '11/09/2018'. Other fields include Sequence (0), Priority (0), and Interest Calculation Factor (0.00). A red box highlights the 'Add New Row (+)' button. The page also includes a 'Comments' text area and a 'Return to General Information' link. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

8. The fields for the new row are open to edit. By default, the *Effective Date* is the current date.

The screenshot shows a form titled "Status" for Project G02RC25GV0031 with Description "Roof and Exterior Repair". The "Project Status" section includes a search bar, pagination (1 of 2), and a "View All" link. The main form fields are: Effective Date (11/13/2018), *Status (C), Priority (0), Interest Calculation Factor (0.00), and a Comments text area. At the bottom, there are buttons for "Save", "Return to Search", "Notify", "Refresh", "Update/Display", and "Include History".

9. Click on the *Status Lookup* and select a new *Status*. Status Codes are described below. For this example, the status will be changed to "Closed".

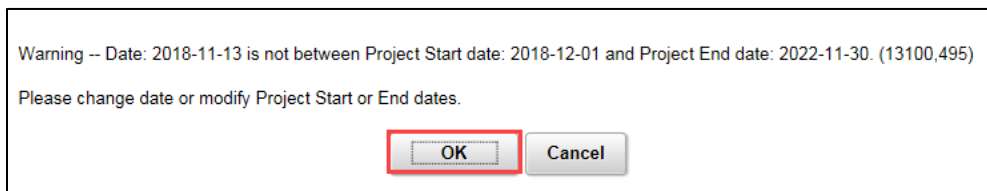
Status	Description
C - Closed	Process Status: C – Inactive When a project is closed, it is not available for selection or processing.
O - Open	Process Status: O – Active
P - Pending	WARNING! Don't Use.
H - Hold	Process Status: H – Inactive When a project is on hold, you cannot process transactions for this project.
X – Pending Close	Process Status: X – Active This status allows General Ledger and Accounts Payable transactions only to be applied to the project. Requisitions or Purchase Orders cannot be created for a project in Pending Close status. This does not prevent transactions from being processed in the Billing and Accounts Receivable modules.

Status	Description
Z – Pending Close – GL Only	<p>Process Status: Z – Active</p> <p>Project Status Z (Pending Close-GL Only) 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.</p> <p>This does not prevent transactions from being processed in the Billing and Accounts Receivable modules.</p>

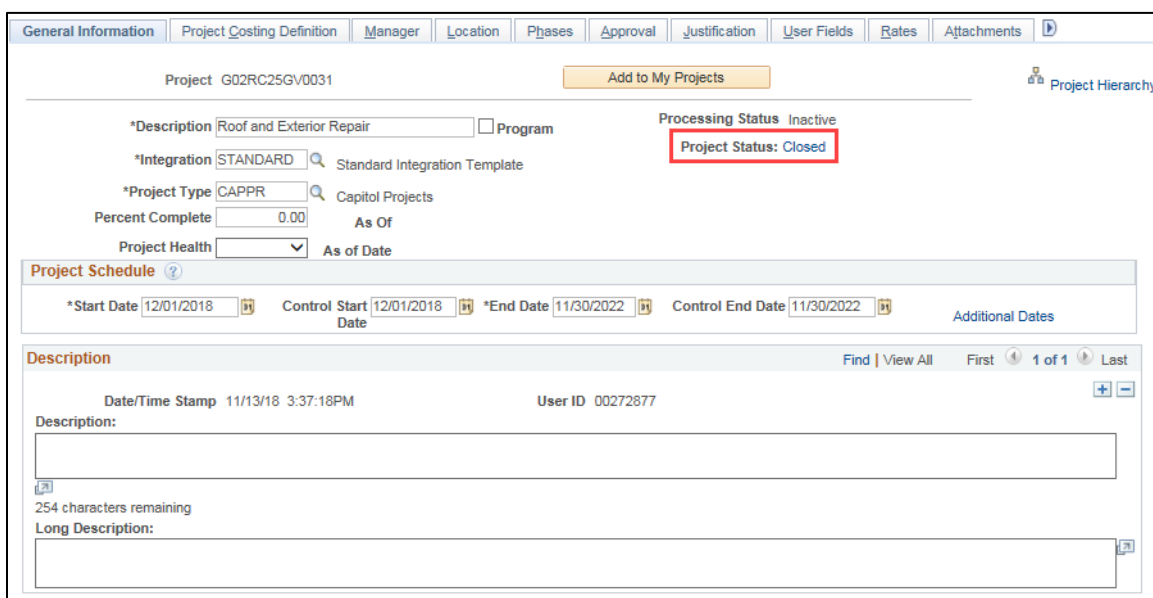
- The Sequence, Priority, and Interest Calculation Factor fields are not used in Minnesota.

10. Enter a *Comment* explaining the reason for the Status change.

11. Click on the **Save** button. 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.



12. Click on the *Return to Project General* link at the bottom-left of page to return to the **General Information** tab of the Project.



- The project **General Information** tab now reflects the new project *Status*.