

QUICK REFERENCE GUIDE

November 1, 2019

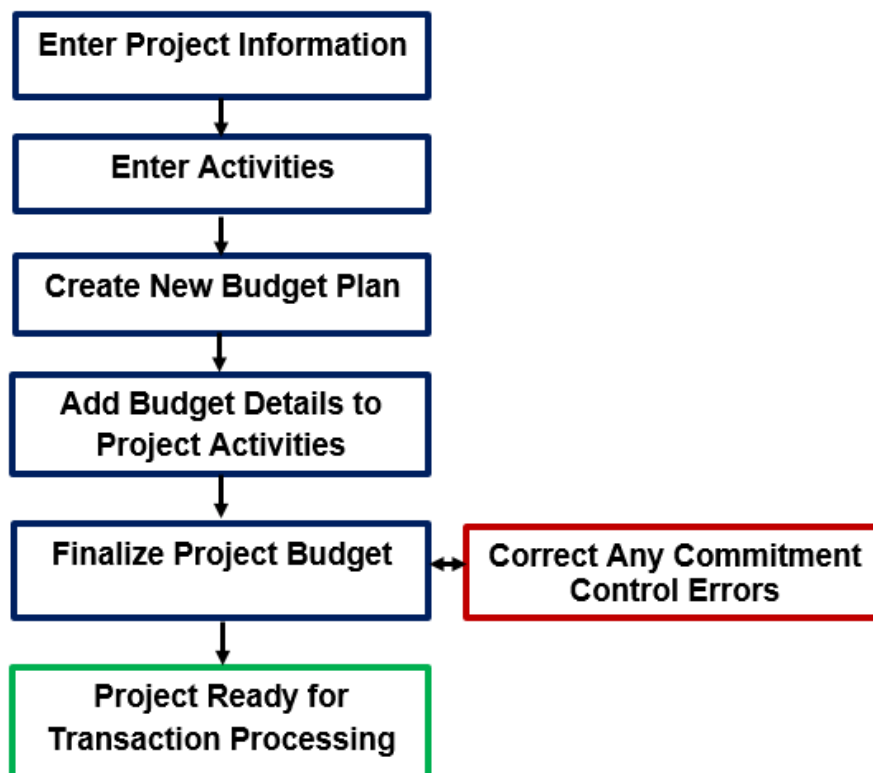
Enter Non-Grant Projects

This guide covers creating a new, non-grant project, such as a capital bonding project. Non-grant projects are created when the project and activities are funded by the agency rather than a sponsor and there is no need to bill. The project will be used to perform cost collection only. You first enter project header information, including the Project ID, Project Description, Type, and Project Start and End Dates. Next, you will add at least one activity to the project. Activity details include the Activity Name, Activity ID, and Activity Start and End Dates.

Note: Project IDs must begin with the first three digits of your Business Unit (your “Agency Mask”). For example, if your Business Unit is G1001, your agency mask is “G10”.

Most agencies require that a project budget be entered. Budgets are entered at the activity level and these entries roll up to the total project budget. The level of budget detail entered differs, depending on the agency. Check with your agency to find out your agency requirements. You can also refer to the [Project Budget Definitions](#) guide.

Entering Non-Grant Projects



Steps to complete:

- Step 1: Enter Project General Information (Project Header)
- Step 2: Add Project Activities
- Step 3: Create a New Budget Plan
- Step 4: Add Budget Details for each Activity
- Step 5: Finalize the New Budget

Step 1: Enter Project General Information (Project Header)

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 Project 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* page, click on the **Add a New Value** tab and complete as described below.

Field Name	Field Description
*Business Unit	Accept the default Business Unit or select a different Business Unit.
*Project ID	WARNING! You must overwrite the default system value "NEXT" with a valid <i>Project ID</i> . The <i>Project ID</i> must begin with the first three digits of your Business Unit (your Agency Mask). For example, if your Business Unit is "G1001", your agency mask is "G10". Check with your agency for additional format requirements for the <i>Project ID</i> . Project ID is a 15-character alphanumerical identifier.
*Create	Accept the default "Blank Project".

General Information

Find an Existing Value
Add a New Value

Business Unit

Project

Create

Add

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

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

Project G02RC25GV0031 Add to My Projects

*Description Program

*Integration

*Project Type

Percent Complete As Of

Project Health As of Date

Processing Status Active

Project Status Open

Project Schedule

*Start Date *End Date Additional Dates

Description Find | View All First 1 of 1 Last

Date/Time Stamp 11/09/18 10:32:04AM User ID 00272877

Description:

254 characters remaining

Long Description:

Save as Template
Copy Project

Save
Refresh

Add
Update/Display
Include History

4. Complete the Project Header as described below.

Field Name	Field Description
*Description	Enter a description for the project. This brief description field is used to identify your project in search results and reports. You can enter longer descriptions at the bottom of the page, if desired. The longer descriptions are not required. The field length is 30 characters.
*Integration	Click on the Lookup icon and select "STANDARD". This is the only valid value.

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Field Name	Field Description
*Project Type	Enter the <i>Project Type</i> . Many different project types may be used at your agency. Be sure to select the correct project type. This example uses a generic code (CAPPR – Capital Project) for agency-directed projects.
Project Status	The <i>Project Status</i> defaults to “Open.” As long as the project is open, the <i>Project ID</i> and <i>Activity IDs</i> can be used as valid ChartField values, even if the project has not yet started. If you want to prevent this, you can change the status now to “Hold,” and then change it back to “Open” when the project actually starts, or when you want to be able to use the <i>Project ID</i> and <i>Activity ID</i> . Note: If you attempt to enter 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.
Percent Complete	State of Minnesota does not use.
Project Health	State of Minnesota does not use.
Program Checkbox	State of Minnesota does not use.

Project G02RC25GV0031

Add to My Projects

*Description: Roof and Exterior Repair Program

Processing Status: Active

*Integration: STANDARD Standard Integration Template

Project Status: Open

*Project Type: CAPPR Capitol Projects

Percent Complete: 0.00 As Of

Project Health: As of Date

Project Schedule

*Start Date: 12/01/2018 *End Date: 11/30/2022 Additional Dates

Description Find | View All First 1 of 1 Last

Date/Time Stamp: 11/09/18 10:32:04AM User ID: 00272877

Description:

254 characters remaining

Long Description:

5. Complete the **Project Schedule** section as described below:

Field Name	Field Description
*Start Date	Enter the project <i>Start Date</i> . After saving the project, the earlier of today's date or the start date becomes the effective date. Payroll transactions cannot be processed prior to this date. If you use budgets, this will also become the <i>Control Start Date</i> . Note: If your project is funded by a continuing appropriation for capital projects (Appropriation Type 02), the <i>Start Date</i> must be within the budget fiscal year (budget period) of the capital appropriation.
*End Date	Enter the project <i>End Date</i> . If you use budgets, this will also become the <i>Control End Date</i> .
Additional Dates Link	State of Minnesota does not use.

The screenshot shows the 'Project Schedule' section of the SWIFT interface. The project ID is G02RC25GV0031. The description is 'Roof and Exterior Repair'. The start date is 12/01/2018 and the end date is 11/30/2022. The description field is highlighted with a red box. The interface also shows tabs for General Information, Project Costing Definition, Manager, Location, Phases, Approval, Justification, User Fields, Rates, and Attachments. The Project Status is 'Open' and the Processing Status is 'Active'.

6. Optionally, complete the **Description** section as described below.

Field Name	Field Description
Description	Optionally, enter a longer description to provide more details about your project than would fit in the short description above. Click on the Modal Window icon to view and enter the description in a larger window. The field length is 254 characters.
Long Description	Optionally, enter a longer description if you need more than 254 characters. Click on the Modal Window icon to view and enter the description in a larger window.

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7. Ensure that you have entered a valid *Project ID* that begins with your agency mask. If you have not entered a valid *Project ID*, leave the page without saving, and start over at step 1. If you have entered a valid *Project ID*, click on the **Save** button.
8. Optionally, click on the **User Fields** tab and enter information in the fields as required by your agency. These fields are available to use at your agency's discretion.

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

Project G02RC25GV0031 Description Roof and Exterior Repair

User Fields

Field 1 User Currency

Field 2 Amount 1

Field 3 Amount 2

Field 4 Amount 3

Field 5 Date 1

Date 2

Save as Template Copy Project

My Projects Project Valuation Project Team Project Activities Go To

Save Refresh Add Update/Display Include History

9. Optionally, click on the **Attachments** tab to add documents to your project. (If the tab is not visible click on the **Show Following tabs** arrow at the top right of the page to view additional tabs.)
 - a. Click on the **Paperclip** icon.
 - b. Browse to the location of the file and select it.
 - c. Click on the **Upload** button.

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

Project G02RC25GV0031 Description Roof and Exterior Repair

Document Attachments Personalize | Find | View All | First 1 of 1 Last

Requests	Attached File			
1	Project_Specs.pdf			

Save as Template Copy Project

My Projects Project Valuation Project Team Project Activities Go To

10. From the **General Information** tab, click on the **Save** button once again, if necessary. After you save a project, several project-related links (**Go To** links) automatically display at the bottom of the page. We will use the *Project Activities* link in the next step.

Note: Many of the tabs available in the *Project* pages are not used or are seldom used:

Tab Name	Field Description
Project Costing Definition	Entries on the <i>Project Costing Definition</i> page should not be changed.
Manager	State of Minnesota does not use this functionality.
Location	Non-grant projects do not require a location to be assigned. Most agencies do not use locations. Check with your agency to determine if you should use the <i>Location</i> page to assign the physical location of the project. If you choose to add location details, you have the option to include multiple locations with different Effective Dates. Note: The <i>Effective Date</i> of the location must be within the project <i>Start</i> and <i>End Dates</i> you entered on the <i>General Information</i> page.
Phases	State of Minnesota does not use.
Approval	State of Minnesota does not use.
Justification	State of Minnesota does not use.
Rates	State of Minnesota does not use.
Asset Integration Rules	If you are interested in integrating project information to the Asset Management Module, contact SWIFT Module Support at: AgencyAssistance.MMB@state.mn.us .
Budget Alerts	State of Minnesota does not use.
New Project Approval	State of Minnesota does not use.

Step 2: Add Project Activities

Every project requires at least one activity.

1. Click on the *Project Activities* link displayed at the bottom of the page.

The screenshot shows the 'Project Information' page for project G02RC25GV0031. The 'Project Activities' tab is highlighted with a red box at the bottom of the page. Other tabs include General Information, Project Costing Definition, Manager, Location, Phases, Approval, Justification, User Fields, Rates, and Attachments. The main form contains fields for Description (Roof and Exterior Repair), Integration (STANDARD), Project Type (CAPPR), Percent Complete (0.00), and Project Health. The Project Schedule section shows Start Date (12/01/2018) and End Date (11/30/2022). The Description section has a text area with 254 characters remaining. At the bottom, the 'Project Activities' link is highlighted in red.

- The **Project Activities** tab displays with one activity row by default. In this example, the project has two activities.

The screenshot shows the 'Project Activities' tab for project G02RC25GV0031. The table displays one activity row with the following data:

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete			
<input type="checkbox"/>	1		NEXT	12/01/2018	11/30/2022	0.00			

Additional details: Project Description: Roof and Exterior Repair, Processing Status: Active, Number Rows: 1, Expand: All Subtasks. The 'Project Activities' tab is selected, and the 'Schedule' sub-tab is active.

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2. If you need to add more than one Activity to the Project, follow the steps below to add additional activity rows. If not, proceed to the next step. In this example, we will have two project activities.

- a. 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.

- b. Click on the **Select** checkbox for the first row that was added by default. The new rows will be added after the selected row.

The screenshot shows the 'Project Activities' interface. At the top, the project is identified as 'G02RC25GV0031' with the description 'Roof and Exterior Repair'. The 'Number Rows' field is set to '1'. Below this, a table lists activities. The first row is selected, indicated by a checked checkbox in the 'Select' column. The table columns include 'WBS ID', '*Activity Name', '*Activity', '*Start Date', '*End Date', and 'Percent Complete'. The first row has a WBS ID of '1', an activity name of 'NEXT', a start date of '12/01/2018', an end date of '11/30/2022', and a completion percentage of '0.00'. A 'Save as Template' button is visible below the table.

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

This screenshot shows the same 'Project Activities' interface as the previous one, but now the 'Number Rows' field is set to '2'. The table now contains two rows. The first row remains selected. The second row has a WBS ID of '2', an activity name of 'NEXT1', a start date of '12/01/2018', an end date of '11/30/2022', and a completion percentage of '0.00'. The 'Add (+)' icon next to the 'Number Rows' field is highlighted, indicating it was just used to add the second row.

3. 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 <i>Activity ID</i> . Follow your agency's convention for completing this field. Some agencies use very specific <i>Activity IDs</i> 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 <i>Start Date</i> and <i>End Date</i> defaults to the <i>Start Date</i> and <i>End Date</i> of the Project. If there is only one activity, the activity <i>Start</i> and <i>End Date</i> must match the project <i>Start</i> and <i>End Date</i> . If your project has multiple activities, you must have at least one activity that starts on the project <i>Start Date</i> , and at least one that ends on the project <i>End Date</i> and there must be no gaps between activities.
Percent Complete	State of Minnesota does not use.
Activity Definition	If you click on the <i>Activity Definition</i> icon (📄) you are brought to the <i>Project Activities General Information</i> pages where you can add additional information about the <i>Activity</i> , if your agency requires. The options available are similar to the <i>Project General Information</i> pages. Click on the <i>Return to Project Activities</i> link to return to the <i>Project Activity</i> pages.
Transfer to Resource	State of Minnesota does not use the Transfer to Resource (👤) option.
Project Transaction List	State of Minnesota does not use.

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete
<input checked="" type="checkbox"/>	1	Construction	2	12/01/2018	11/30/2022	0.00
<input type="checkbox"/>	2	Study	6	12/01/2018	11/30/2022	0.00

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.

- 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.

The screenshot shows the 'Project Activities' interface. At the top, there are tabs for 'Project Activities' and 'Gantt Chart'. Below the tabs, the project details are displayed: Project G02RC25GV0031, Description Roof and Exterior Repair, and Processing Status Active. There are navigation icons and a 'Number Rows' dropdown set to 1. Below this is a search bar and a 'View All' link. The main section is a table with columns: Select, WBS ID, *Activity Name, *Activity, *Start Date, *End Date, and Percent Complete. The table has two rows: one for 'Construction' (WBS ID 1, Activity 2, Start Date 12/01/2018, End Date 11/30/2022, Percent Complete 0.00) and one for 'Study' (WBS ID 2, Activity 6, Start Date 12/01/2018, End Date 11/30/2022, Percent Complete 0.00). Below the table are buttons for 'Save as Template', 'Return to General Information', 'Save', 'Return to Search', 'Notify', and 'Refresh'.

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete
<input checked="" type="checkbox"/>	1	Construction	2	12/01/2018	11/30/2022	0.00
<input type="checkbox"/>	2	Study	6	12/01/2018	11/30/2022	0.00

- If your agency requires you to enter a project budget, proceed to the next step. Otherwise, expenses associated with the project can now be collected and tracked.

Step 3: Create a New Budget Plan

In most cases, you will need to add a project budget to the new project. This approach is recommended by Minnesota Management & Budget since it provides more control over your projects. Check with your agency to determine your agency's requirements. If you establish a project budget, transactions that exceed the budget will not pass budget check and transactions with budget dates outside the budget Control Start and End Dates will also fail. The project budget begins with a Budget Plan, which establishes the high-level settings for the budget. After creating the Budget Plan, you will enter the details of the budget by activity. Later, you will return to the *Budget Plan* page to finalize the project budget.

Begin by navigating to the *Budget Plan* page.

- If you are continuing from the last step, click on the *Return to General Information* link at the bottom left of the page and select the "Project Budgeting" option from the navigation drop-down menu at the bottom right of the *General Information* page. (**Navigation:** Project Costing, Projects WorkCenter, left-menu, Links section, Project Setup, Budget Plan.)
- At the *Budget Plan* search page, click the **Add a New Value** tab to create a new Budget Plan.
- If necessary, enter your *Project ID*.

Budget Plan

Find an Existing Value | Add a New Value

Business Unit

Project

Add

4. Click the **Add** button. The *Budget Plan* page displays.

Budget Plan

Project G02RC25GV0031 Description Roof and Exterior Repair

Processing Status Active

Process Monitor

Project Budget Plans Personalize | Find | View All | First 1 of 1 Last

General | Calendar | Commitment Control | Finalize

*Plan ID	Description	*Status	Total Distributed Budget	*Currency	*Budget Type	*Analysis Type	Max Budget Items to Retrieve
1	<input type="text"/>	Active	0.00	USD	Cost Budget	BUD	

Save as Template

Return to General Information

Save | Notify | Refresh | Add | Update/Display

5. Enter a *Description* for the Budget Plan and accept the default values for the remaining fields on the **General** and **Calendar** tabs as described below.

Field Name	Field Description
*Plan ID	Accept the default "1".
Description	Enter the <i>Description</i> . This can be the same as or different than the project description. The field length is 30 characters.
*Status	Accept the default "Active".
*Currency	Accept the default "USD".
*Budget Type	Accept the default "Cost Budget".
*Analysis Type	Accept the default "BUD".
*Calendar Type	Accept the default. This value will vary depending on your agency's Project Budget Definition. The correct value for your agency will default.
*Start Date	Accept the default.
*Number of Periods	Accept the default "1".

Budget Plan

Project G02RC25GV0031 Description Roof and Exterior Repair

Processing Status Active Process Monitor

Project Budget Plans Personalize | Find | View All | First 1 of 1 Last

General | Calendar | Commitment Control | Finalize

*Plan ID	Description	*Status	Total Distributed Budget	*Currency	*Budget Type	*Analysis Type	Max Budget Items to Retrieve
1	Roof and Exterior Repair	Active	0.00	USD	Cost Budget	BUD	

Save as Template

Return to General Information

Save | Notify | Refresh | Add | Update/Display

6. Click on the **Save** button.

Step 4: Add Budget Details for each Activity

Next, you will add Budget Items and Amounts for each activity. These entries will build the overall project budget.

- On the **General** tab of the *Budget Plan* page, click on the **Details** (📄) icon to display the *Budget Detail* page.
 - In this example, the project has two activities. If you have more than one activity, you will perform the upcoming steps for each Activity. After entering Budget Items and Amounts for each Activity, the Budget Detail page will show the overall budget for the project broken out by activity.

Budget Detail

Project G02RC25GV0031 Description Roof and Exterior Repair

Plan ID 1 Description Roof and Exterior Repair

Currency Code USD Charging Level Detail

Calendar ID AL Number of Periods 1

Analysis Type BUD

✓ Budget eligible for finalization

⚠ Budget not eligible for finalization

Distribute Budget Distributed Budget (Add To/Subtract From) Expand (All Subtasks) Filter Budget Item Search

Project Budget Details Personalize | Find | First 1-3 of 3 Last

Budget Periods | Project Detail | General Ledger Detail | Commitment Control Detail

Status	WBS ID	Activity Name/Budget Item	Budget Items	Spread Option	Percent	Budget Adjustment	Distributed Budget	Target Budget	Undistributed Adjustment	ALL
		Roof and Exterior Repair		Select Spread		0.00	0.00	0.00	0.00	
	1	Construction				0.00	0.00	0.00	0.00	
	2	Study				0.00	0.00	0.00	0.00	

Distribute Budget Copy From Another Plan

Go To: Budget Plan | Budget Items | Budget vs. Actual | Project Activities | Process Monitor

Return to Budget Plan

Save | Return to Search | Notify | Refresh | Update/Display | Include History

- On the *Budget Detail* page, click on the **Budget Items** (📄) icon for an Activity to enter the Budget Items and Amounts. The *Adjust Budget Items* page displays where you will select Project Budget Item(s) and enter Budget Adjustment amounts. The Budget Adjustment field is locked until you select a spread option.

3. Select a **Spread Option** in the Adjust Budget Items header. This example uses the “Adjust by Amount” option.

Field Name	Field Description
Spread Option	<p>The Budget Adjustment field is locked until you select a spread option. Select a <i>Spread Option</i> from the drop-down listing:</p> <ul style="list-style-type: none"> - Adjust by Amount: In most cases, you will select “Adjust by Amount”. This allows you to enter specific amounts for each Budget Item you select for this activity. <p>If you are interested in using any of the other spread options, contact the SWIFT Helpdesk for assistance.</p>

The screenshot shows the 'Project Budget Items' dialog box. At the top, it displays 'Activity 2' and 'Description Construction'. Below this, there are fields for 'Budget Adjustment', 'Distributed Budget', 'Target Budget', and 'Undistributed Adjustment', all showing 0.00. A 'Distribute Budget' button is visible. The 'Spread Option' dropdown menu is highlighted with a red box and set to 'Adjust by Amount'. Below the dialog, there is a 'Budget Item Distribution' section with tabs for 'Budget Items', 'Project Detail', 'General Ledger Detail', and 'Commitment Control Detail'. The 'Budget Items' tab is active, showing a table with columns: Project Budget Item, Seq #, Percentage, Budget Adjustment, Distributed Budget, Target Budget, and Undistributed Adjustment. The table contains one row with Seq # 1 and Budget Adjustment 0.00. There are also 'Distribute Budget', 'OK', and 'Cancel' buttons at the bottom.

4. Complete the **Budget Items** tab in the **Budget Item Distribution** section.

WARNING! Only use the **Tab** key to navigate between fields; do not use the Enter Key. If the Enter Key is used, you will be brought back to the *Budget Detail* page. It will look as though you have not entered any Budget Detail data. You will need to **Save**, click the *Return to Budget Plan* link, and then click on the **Budget Detail** icon. Your changes will now display on the *Budget Detail* page and you can continue processing the budget.

Field Name	Field Description
Project Budget Item	Select the <i>Project Budget Item</i> from the drop-down listing. Each agency will have a different set of options for this field. Some agencies enter the entire amount using the <i>Project Budget Item</i> “ALL,” as shown in this example. Other agencies may split the budgeted amounts between salary and non-salary activities. In other cases, agencies may budget to an even greater detail, using specific budget items within each activity.
Budget Adjustment	Enter the amount budgeted for the <i>Budget Item</i> in the Budget Adjustment field.

Project Budget Items [X] Help

Activity 2 Description Construction
 Budget Adjustment 0.00 Currency Code USD
 Distributed Budget 0.00
 Target Budget 0.00
 Undistributed Adjustment 0.00

Distribute Budget Spread Option Adjust by Amount Distributed Budget Add To/Subtract From

Budget Item Distribution Personalize | Find | [?] [] First 1 of 1 Last

Budget Items | Project Detail | General Ledger Detail | Commitment Control Detail

Project Budget Item	Seq #	Percentage	Budget Adjustment	Distributed Budget	Target Budget	Undistributed Adjustment
ALL	1		100000	0.00	0.00	[+] [-]

Distribute Budget

OK Cancel

5. If you need to add additional *Project Budget Items*, click on the **Add New Row (+)** icon and enter the fields as described above.
6. Next, you'll need to enter the ChartFields for the *Project Budget Item(s)* on the **Budget Item Distribution** section tabs. Check with your agency to make sure you are entering the required ChartFields. The "[Project Budget Definitions](#)" guide may also be of assistance. In some cases, your agency may not require ChartField values to be entered. The example used in this guide is representative and may not match the values used for your project.

Project Budget Items [X] Help

Activity 2 Description Construction
 Budget Adjustment 0.00 Currency Code USD
 Distributed Budget 0.00
 Target Budget 0.00
 Undistributed Adjustment 0.00

Distribute Budget Spread Option Adjust by Amount Distributed Budget Add To/Subtract From

Budget Item Distribution Personalize | Find | [?] [] First 1 of 1 Last

Budget Items | Project Detail | General Ledger Detail | Commitment Control Detail

Project Budget Item	Seq #	GL Business Unit	Account	Fund Code	Financial Department ID	Statewide Cost (Prog)	Sub Account (Class)	Agency Cost 1 (CF1)	Agency Cost 2 (CF2)	A (C)
ALL	1	MND01		3600						

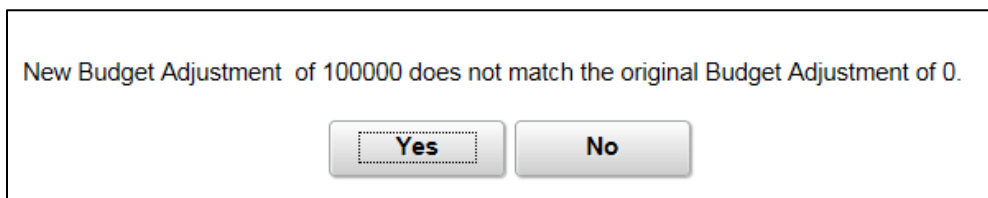
Distribute Budget

OK Cancel

Tab	Available ChartFields
General Ledger Detail tab	Account Fund Financial Department ID Appropriation ID Statewide Cost (Proj) Sub Account (Class) Agency Cost 1 Agency Cost 2
Project Detail tab	Source Type Category Subcategory
Commitment Control Detail tab	The entries on the Commitment Control Detail tab should not be changed.

- After entering all *Project Budget Items* and required ChartFields, click on the **OK** button.
- You will receive a message indicating that the “New Budget Adjustment of \$XXXXX does not match the original Budget Adjustment of 0”. You receive this message because you are technically adjusting a budget of \$0 by the amount you entered.

Click the **Yes** button. You will return to the *Budget Detail* page






- If you have more than one Activity, repeat the above steps to add *Project Budget Items* and *Adjustment Amounts* so that the total equals the project budget that must be established.
- When you are done, view the *Budget Detail* page to ensure that the amount listed on the first line for the project equals the total budget amount needed for the project. If not, make the necessary changes before proceeding to the next step.






Budget Detail

Project G02RC25GV0031 Description Roof and Exterior Repair
 Plan ID 1 Description Roof and Exterior Repair
 Currency Code USD Charging Level Detail
 Calendar ID AL Number of Periods 1
 Analysis Type BUD
 Budget eligible for finalization
 Budget not eligible for finalization

Distribute Budget Distributed Budget Add To/Subtract From Expand All Subtasks Filter Budget Item Search

Project Budget Details Personalize | Find |  

Budget Periods | Project Detail | General Ledger Detail | Commitment Control Detail 



Status	WBS ID	Activity Name/Budget Item	Budget Items	Spread Option	Percent	Budget Adjustment	Distributed Budget	Target Budget	Undistributed Adjustment	Even Spread	Other
		Roof and Exterior Repair		Select Spread		150,000.00	0.00	150,000.00	150,000.00		
	1	Construction		Select Spread		100,000.00	0.00	100,000.00	100,000.00		
		All Budget Items				100,000.00	0.00	100,000.00	100,000.00	Even Spread	Other
	2	Study		Select Spread		50,000.00	0.00	50,000.00	50,000.00		
		All Budget Items				50,000.00	0.00	50,000.00	50,000.00	Even Spread	Other


- The **Yellow Triangle** icons in the *Status Column* of the *Budget Detail* page indicate that the budget, as it is currently saved, is not eligible for finalization. If necessary, use the scroll bar at the bottom of the page to scroll to the right so the **Even Spread** button(s) display.
- Click on the **Even Spread** button for each activity to fully distribute the budget amount. The budget amount should move from the “Undistributed Adjustment” column to “Distributed Budget,” as shown in the next screenshot.
- Click on the **Save** button. The *Status* column now shows **Green Checkmark** icons indicating the budget is eligible for finalization.








Budget Detail

Project G02RC25GV0031 Description Roof and Exterior Repair
 Plan ID 1 Description Roof and Exterior Repair
 Currency Code USD Charging Level Detail
 Calendar ID AL Number of Periods 1
 Analysis Type BUD
 Budget eligible for finalization
 Budget not eligible for finalization

Distribute Budget Distributed Budget Add To/Subtract From Expand All Subtasks Filter Budget Item Search

Project Budget Details Personalize | Find |  

Budget Periods | Project Detail | General Ledger Detail | Commitment Control Detail 

Status	WBS ID	Activity Name/Budget Item	Budget Items	Spread Option	Percent	Budget Adjustment	Distributed Budget	Target Budget	Undistributed Adjustment	Even Spread	Other
		Roof and Exterior Repair		Select Spread		0.00	150,000.00	150,000.00	0.00		
	1	Construction		Select Spread		0.00	100,000.00	100,000.00	0.00		
		All Budget Items				0.00	100,000.00	100,000.00	0.00	Even Spread	Other
	2	Study		Select Spread		0.00	50,000.00	50,000.00	0.00		
		All Budget Items				0.00	50,000.00	50,000.00	0.00	Even Spread	Other

Distribute Budget Copy From Another Plan

Go To: Budget Plan Budget Items Budget vs. Actual Project Activities Process Monitor
 Return to Budget Plan

- Click on the *Return to Budget Plan* link or the **Go To: Budget Plan** link on the bottom of the page. (They both go to the same place.) The *Budget Plan* page displays.

Budget Plan

Project **G02RC25GV0031** Description **Roof and Exterior Repair**

Processing Status **Active** Process Monitor

Project Budget Plans Personalize | Find | View All | First 1 of 1 Last

General | Calendar | Commitment Control | **Finalize**

Plan ID	Description	*Status	Total Distributed Budget	Currency	Budget Type	Analysis Type	Max Budget Items to Retrieve
1	Roof and Exterior Repair	Active	150,000.00	JSD	Cost Budget	BUD	

Save as Template

Return to General Information

Save | Return to Search | Notify | Refresh Add | Update/Display

Step 5: Finalize the New Budget

The last step is to finalize the budget. After the budget has been finalized, you will not be able to change the existing budget lines. Instead, you'll need to enter Budget Adjustments as described in the "[Adjust a Project Budget](#)" guide.

1. Verify that the *Total Distributed Budget* amount equals the amount of the project. (All other fields default with the correct values.)

If you realize that you've made a mistake, you can re-enter the Budget Plan and Budget Detail by doing the following:

- a. Set the Budget Plan **Status** to "Inactive".
 - b. Click the **Delete Row (-)** icon.
 - c. Click on the **Save** button.
 - d. Go back to Step 3: Enter a new Budget Plan.
2. After verifying that the budget information is correct, click on the **Finalize** tab.
 3. Click on the **Finalize** button. This initiates the budget finalization process, which creates a Commitment Control budget based on the project budget details you entered.

Budget Plan

Project **G02RC25GV0031** Description **Roof and Exterior Repair**

Processing Status **Active** Process Monitor

Project Budget Plans Personalize | Find | View All | First 1 of 1 Last

General | Calendar | Commitment Control | **Finalize**

Plan ID	Description	*Status	Total Distributed Budget	Finalized Amount	Last Finalized
1	Roof and Exterior Repair	Active	150,000.00	0.00	

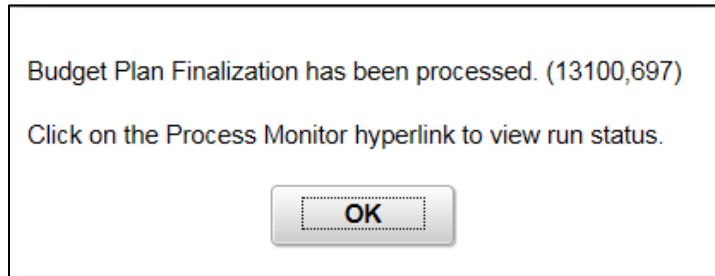
Save as Template

Return to General Information

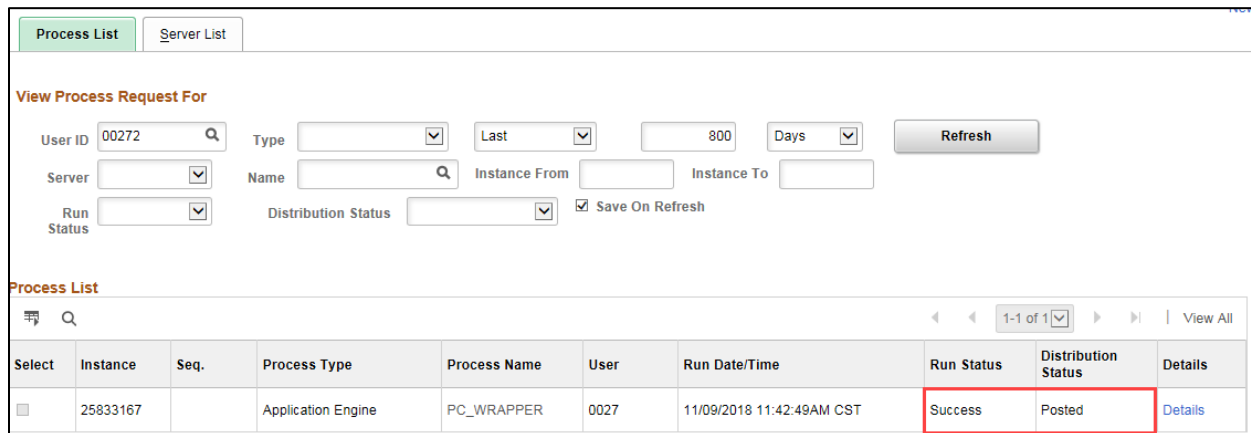
Save | Return to Search | Notify | Refresh Add | Update/Display

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- You will receive a message indicating that the Budget Plan Finalization has been processed and you can click on the *Process Monitor* link to view the status of the process. Click on the **OK** button.



- Click on the *Process Monitor* link.
- At the *Process List* page, click on the **Refresh** button until the Run Status = Success and the Distribution Status = Posted.



- You must view the Message Log to ensure that the process was successful. Click on the *Details* link. The *Process Detail* page displays.
- Click on the *Message Log* link.
- Review the information displayed on the *Message Log* page.
 - You should see messages indicating that rows have been successfully inserted into the “PC” Project Costing and Commitment Control modules. Make sure the number of rows listed equal the number of Budget Items you are processing.
 - You will most likely see a number of warning messages which you can ignore.
 - If errors exist, refer to the [“Correct Commitment Control \(Project Budget Check\) Errors”](#) guide for assistance.

Message Log x

[Help](#)

Process

Instance: 25833167 Type: Application Engine
Name: PC_WRAPPER Description: PC_INTFEDIT On-Line Wrapper

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1-50 of 96
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Severity	Log Time	Message Text	Explain
10	11:43:18AM	2 Row(s) Processed	Explain
10	11:43:26AM	2 rows started commitment control budget creation.	Explain
10	11:43:27AM	2 rows inserted into PC_KK_HDR.	Explain
10	11:43:27AM	2 rows inserted into PC_KK_LN.	Explain
	11:43:34AM	WARNING: UNABLE TO PERFORM COMMIT - FORCING USE OF BASE TABLE FOR M_GLBD_CK_TAO	Explain
10	11:43:42AM	Request Statistics. Documents Processed: 2, Errors: 0, Warnings: 0	Explain
10	11:43:42AM	Commitment Control Budget Processing Complete.	Explain
10	11:43:43AM	2 rows successfully completed commitment control budget creation.	Explain

10. Click on the **Return** button to go back to the *Process Detail* page.
11. Click on the **OK** button to return to the *Process List* page.
12. Click on the *Go back to Budget Plan* link to return to the *Budget Plan* search page.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

13. On the *Budget Plan* page, use the **Find An Existing Value** tab to search for and select the project.

Budget Plan

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

Processing Status =

Case Sensitive

14. On the *Budget Plan* page, click on the **Finalize** tab to confirm that the “Finalized Amount” now equals the “Budgeted Amount”. The “Last Finalized” field shows the date and time the process was run, and the **Finalize** button is disabled because there is no budget amount remaining to be finalized. Future budget updates will require you to run the budget finalization process again.

Budget Plan

Project G02RC25GV0031 Description Roof and Exterior Repair

Processing Status Active Process Monitor

Project Budget Plans Personalize | Find | View All | First 1 of 1 Last

Plan ID	Description	*Status	Total Distributed Budget	Finalized Amount	Last Finalized	
1	Roof and Exterior Repair	Active	150,000.00	150,000.00	11/09/18 11:42AM	<input type="button" value="Finalize"/> <input type="button" value="+"/>

[Return to General Information](#)

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- If you have the Budget Inquiry role, after the project budget has been finalized, you can navigate to the *Budget Overview* page and search for and view the project budget. (**Navigation:** Accounting, Commitment Control, GL/KK WorkCenter, left-menu, Links section, KK Links, Budgets Overview.). Refer to the "[View Budget Overview Inquiry](#)" guide for detailed instructions.

Inquiry Results

Business Unit: MN001
 Ledger Group: KK_PRJ_CHD
 Type of Calendar: Detail Budget Period
 Amounts in Base Currency: USD
 Revenue Associated:

[Return to Criteria](#) Max Rows: [Display Options](#)

Ledger Totals (2 Rows)

Budget	150,000.00	Net Transfers	0.00
Expense	0.00		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	150,000.00		
Associate Revenue	0.00		
Available Budget	150,000.00		

Budget Overview Results

1-2 of 2 | View All

	Project	Activity	Source Type	Resource Type	Appropriation ID (CF3)	Budget Period	Budget	Expense	Encumbrance	Pre-Enc
1	G02RC25GV0031	2				ALL	100,000.00	0.00	0.00	
2	G02RC25GV0031	6				ALL	50,000.00	0.00	0.00	