SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Add Projects and Activities

This guide covers adding projects and activities after the award has been generated. You will start by adding a contract amendment in the Customer Contracts module. While it is possible to add the project and activities in the Grants Management Module and then associate them with an existing contract, it is much easier to create a contract amendment and begin the process in the Customer Contracts module. You will add the projects and activities from the contract pages, but these will link back to the Grants Management module. You'll also need to update the Budget Period date for the project and create the project budget.

> **WARNING!** All components of the grant (the award, contract, and project) should be kept in sync. Updating one component and not updating another can lead to confusion and processing errors.

Steps to complete:

- Step 1: Add a Contract Amendment
- Step 2: Add Projects
- Step 3: Add Project Activities
- Step 4: Process the Amendment
- Step 5: Add a Contract Note
- Step 6: Update the Budget Period Dates
- Step 7: Create a Project Budget

Step 1: Add a Contract Amendment

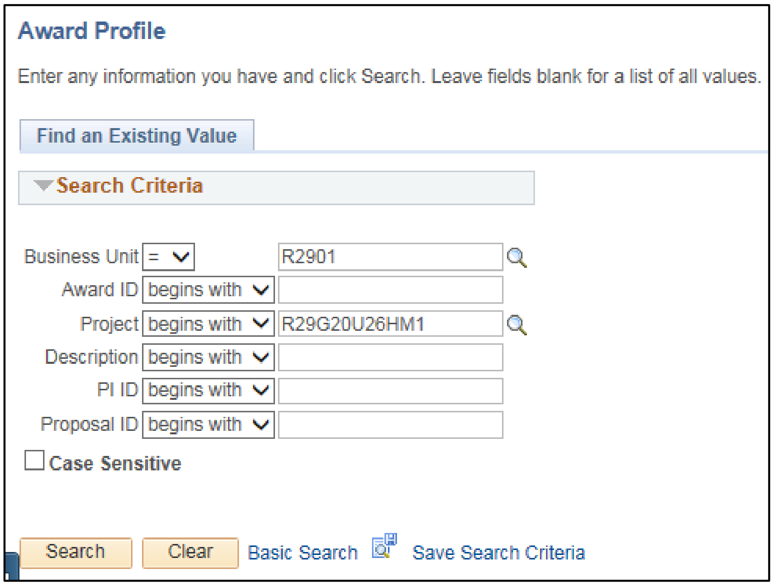
When you generate an award, SWIFT also creates a Customer Contract. This contract represents the relationship between the agency receiving the grant funds and the grant sponsor. The customer contract must be correct to be able to bill the sponsor. Once the customer contract is in "Active" status, any change to the contract must be accompanied by a contract amendment.

Begin by accessing the *Award Profile* page for the grant you want to work with.

1. Navigate to the *Award Profile* page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left-menu, Links section, Maintain Award, Award Profile.

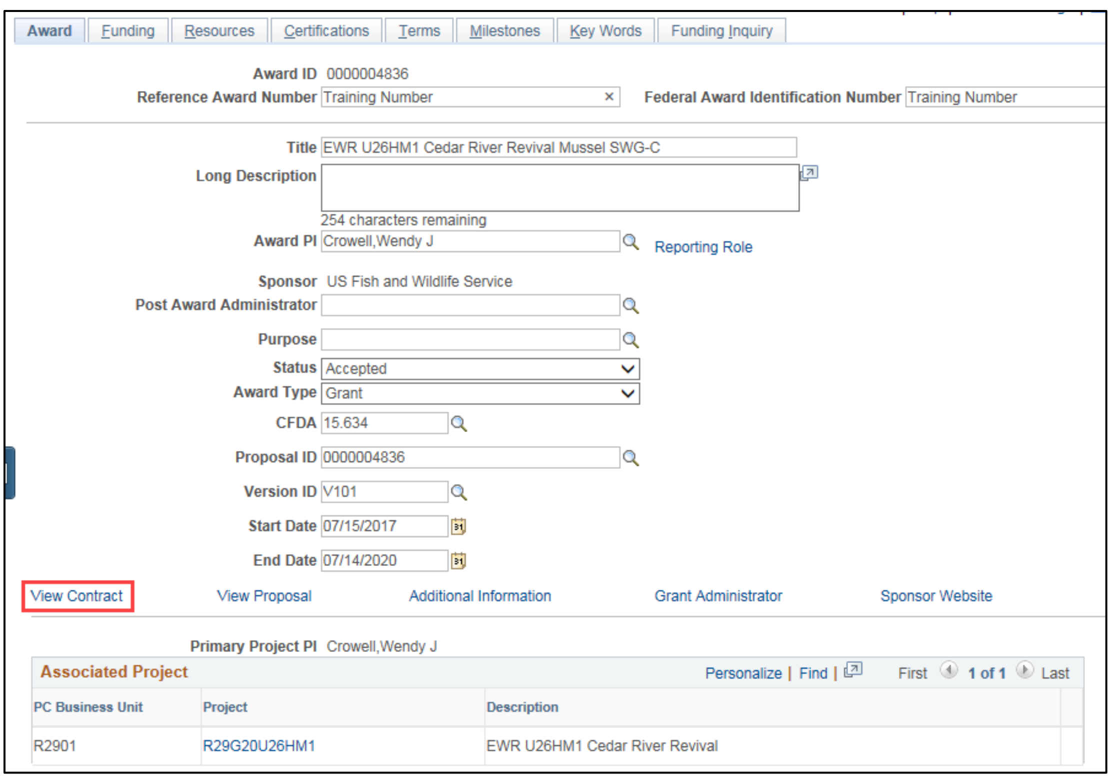
2. At the *Award Profile* page, verify the *Business Unit* and enter the *Award ID* for the award you want to update. (You can also search by Project ID, Description, and Proposal ID.)



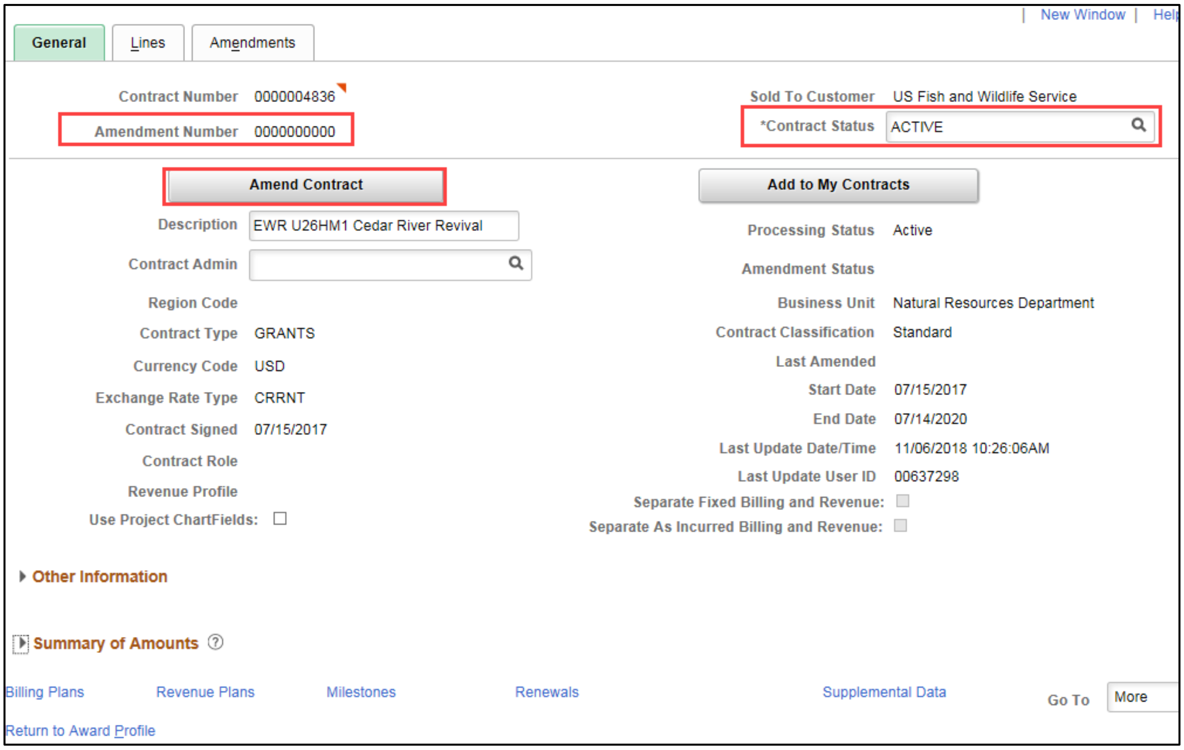
3. Click on the **Search** button.

4. If necessary, click on the *Award* ID in the **Search Results** section. The *Award Profile* page displays.

5. From the *Award Profile* page, click on the *View Contract* link located just above the **Associated Project** section on the left side of the page.

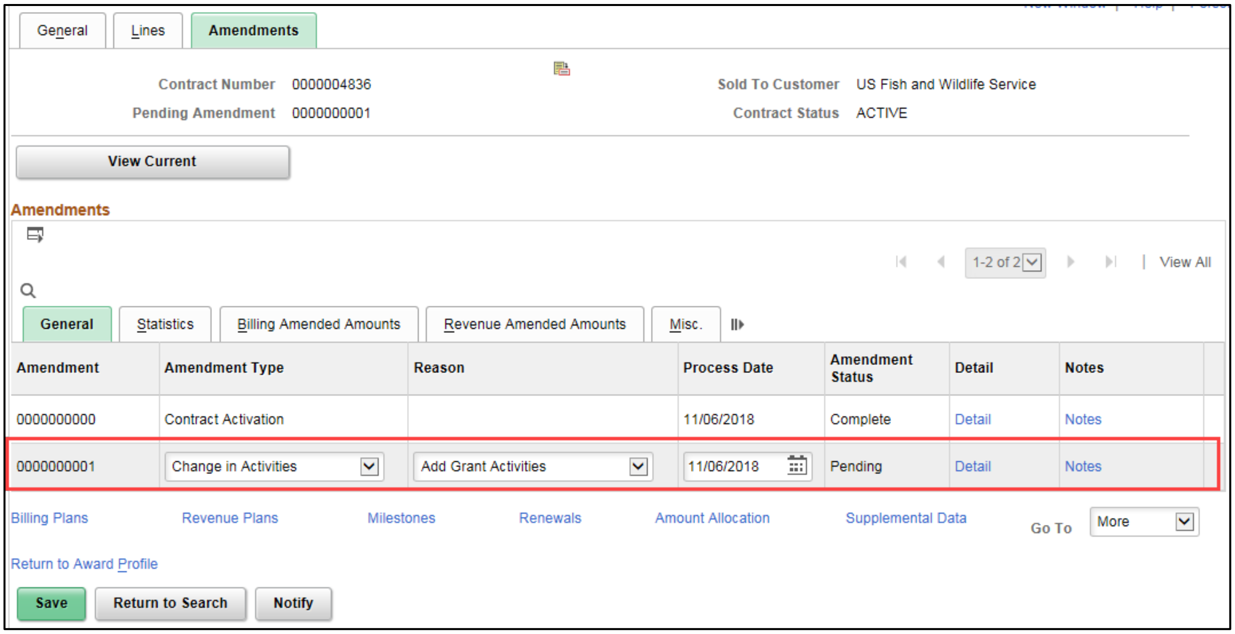


The contract *General* page displays. Note the current *Contract Status* and *Amendment Number*.



6. Click on the **Amend Contract** button to access the contracts **Amendments** tab.
7. A new amendment row has opened. Enter the amendment as described below:

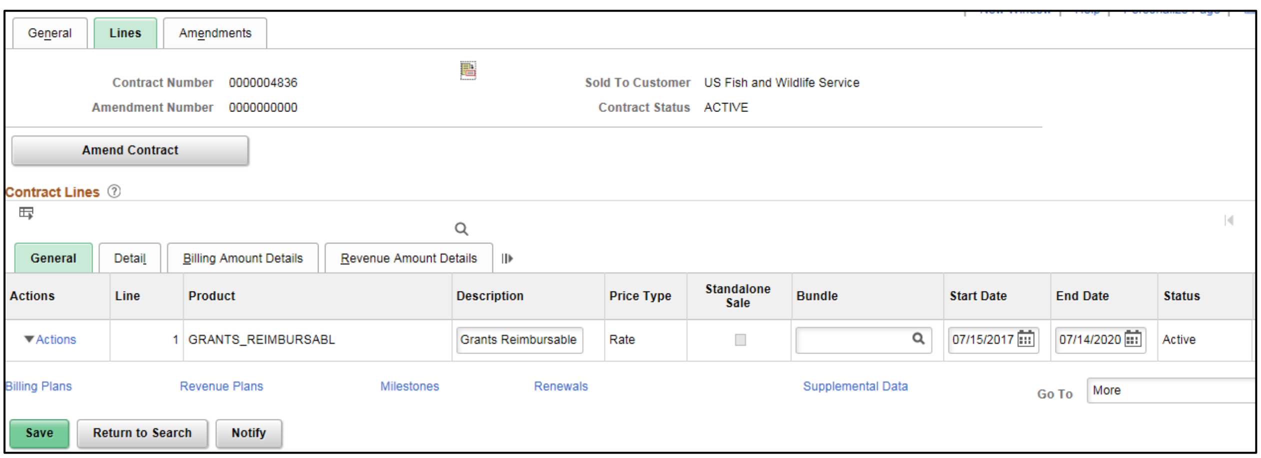
Field Name	Field Description
***Amendment Type**	Select the "Change in Activities" *Amendment Type* from the drop-down menu.
***Reason**	Select the Reason - Add Grant Activities While available, the State of Minnesota does not use the "Reduce GR Activities" option. If you are no longer using a project or activity under a contract, the individual project or activity budgets should be reduced or redistributed, and the project/activity made inactive (closed). Likewise, any change in funding or time that results from this should have a corresponding contract amendment to adjust the contract accordingly.



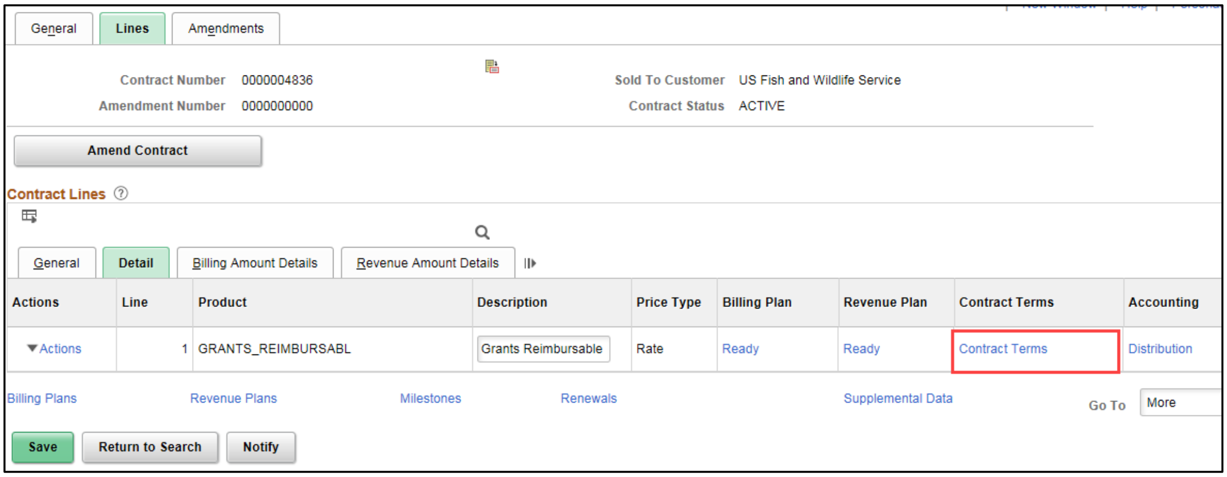
8. Click on the **Save** button. A new amendment has been created in the “Pending” status. You will need to make the project and activity changes and then come back to this page to process the amendment.

Step 2: Add Projects

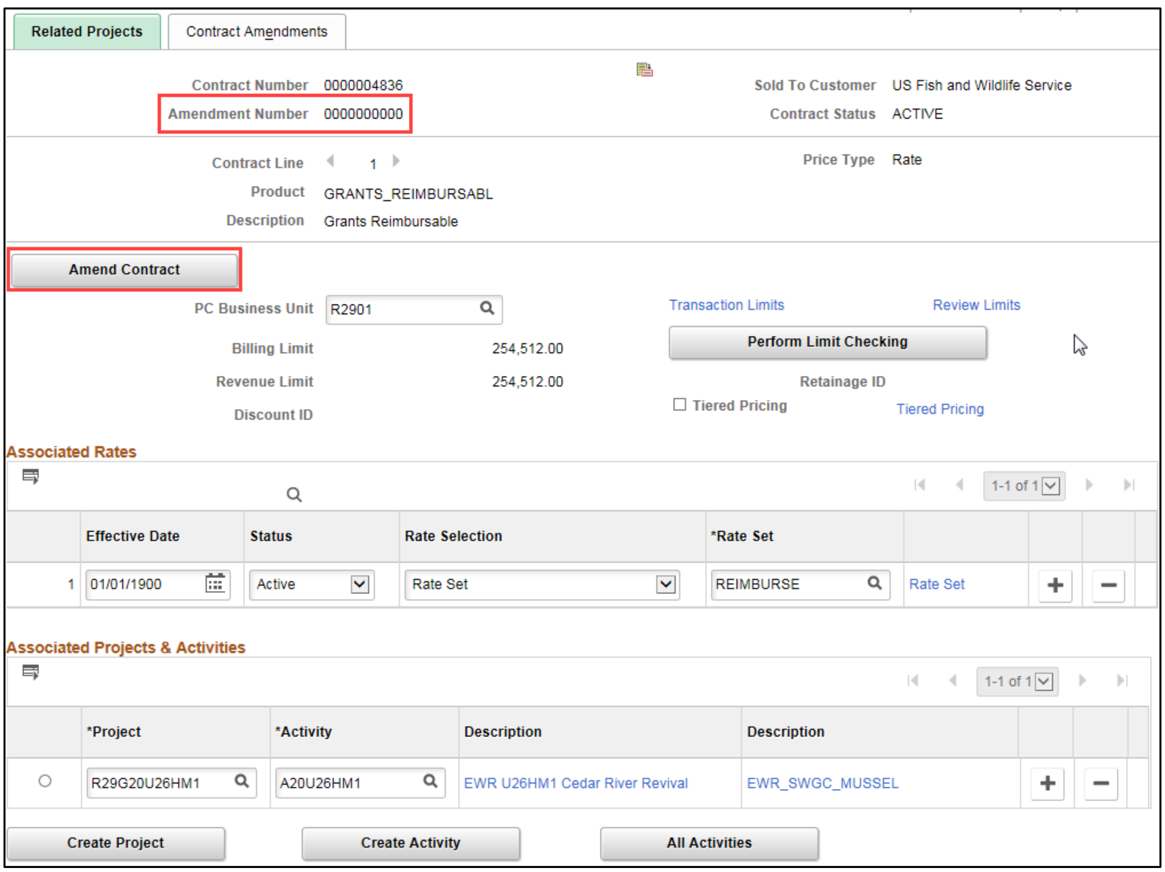
1. Click on the **Lines** tab.



2. Click on the **Detail** tab in the **Contract Lines** section.

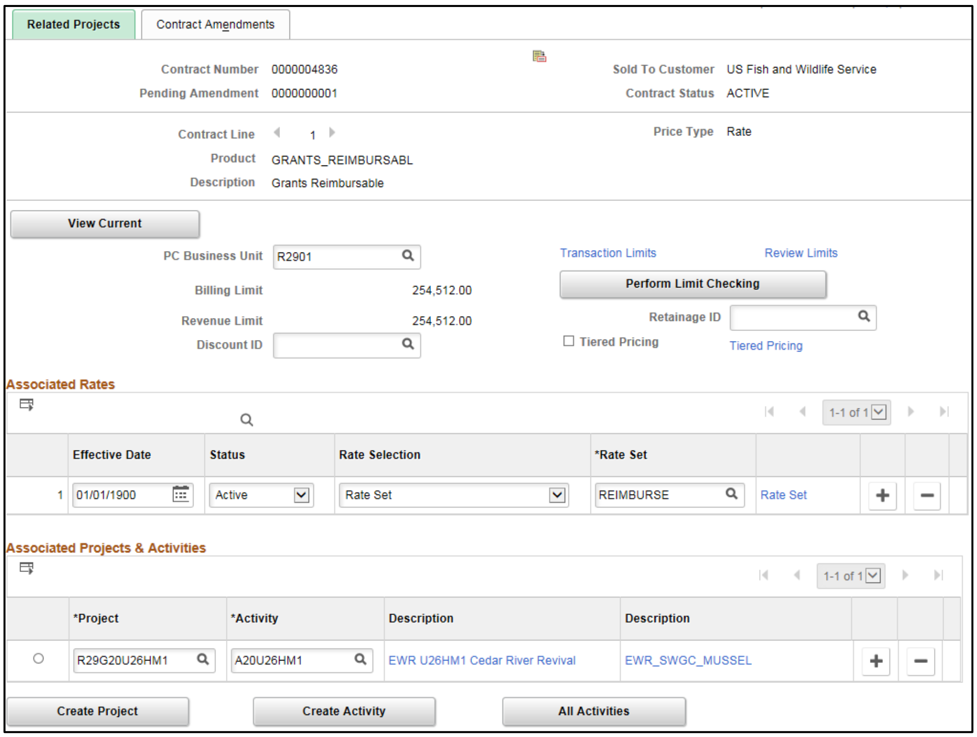


3. Click on the *Contract Terms* link. The *Related Projects* page displays.



4. **WARNING**! Make sure you are working in the pending amendment and not the current version of the contract. If you are not on the amendment, click on the **Amend Contract** button again to switch to the amendment and click **OK** at the message indicating that "Amendment number #, Type: Change in Activities is currently available for edit."

You should now be working on the amendment.



The **Associated Projects and Activities** section lists all projects that are currently associated with this contract. In this example, only one project is currently associated with the contract. If there are more, you can click the **Arrow** icons to navigate through the list, or click “View All” to see all projects at once.

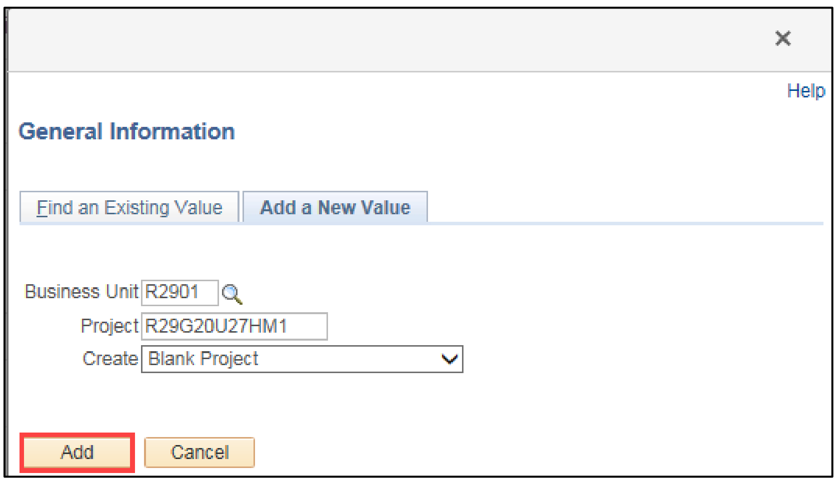
There are several actions you can take from this page:

Button	Action
Add (+)	You can click on the **Add** (+) button in the **Associated Projects & Activities** section to add a new row and associate existing Projects and Activities to the Contract. For example, you could create Project and Activities in the Grant Module and then come to this page and associate them to the contract. **Note**: MMB recommends adding new projects and activities from the contract using the process that follows. This ensures that the new projects/activities are associated with the contract and avoids SEFA reporting issues.

Button	Action
Create Project	Click this button to create a Project that will be associated to the Contract. You will be brought to the Project pages of the Grants Management module to make your entries.
Create Activity	Select the Project that you wish to add the Activity to and click this button to create the Activity that will be associated to the Project and the Contract. You will be brought to the Project Activity pages of the Grant Management module to make your entries.
All Activities	Click this button to add Activities that were created and added to the Project in the Grants Management module but have not yet been associated to the contract.

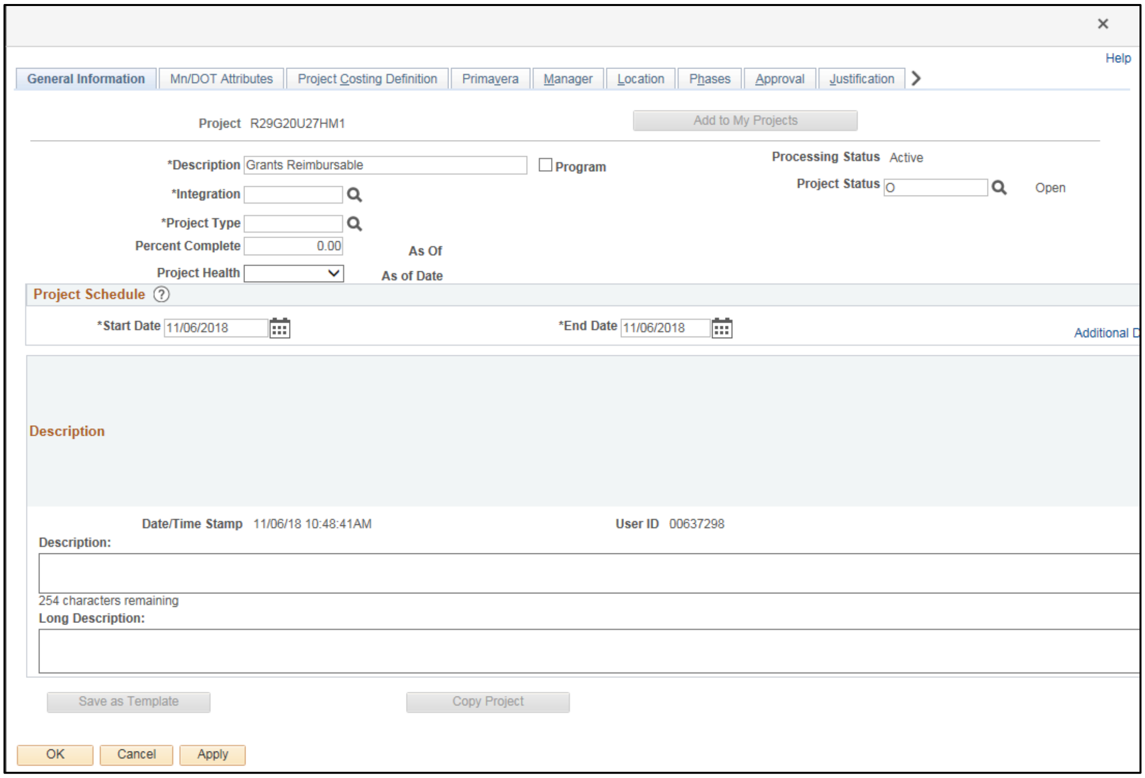
In this example, we will add a new project and activity to the contract.

5. On the **Related Projects** tab, click on the **Create Project** button.
6. Complete the *General Information* page as described below.



Field Name	Field Description
Business Unit	Accept the Business Unit.
***Project ID**	**WARNING**! You must overwrite the default system value (NEXT_1) with a valid *Project ID*. The *Project ID* 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 *Project ID*. Project ID is a 15-character alphanumerical identifier.
***Create**	Accept the default "Blank Project".

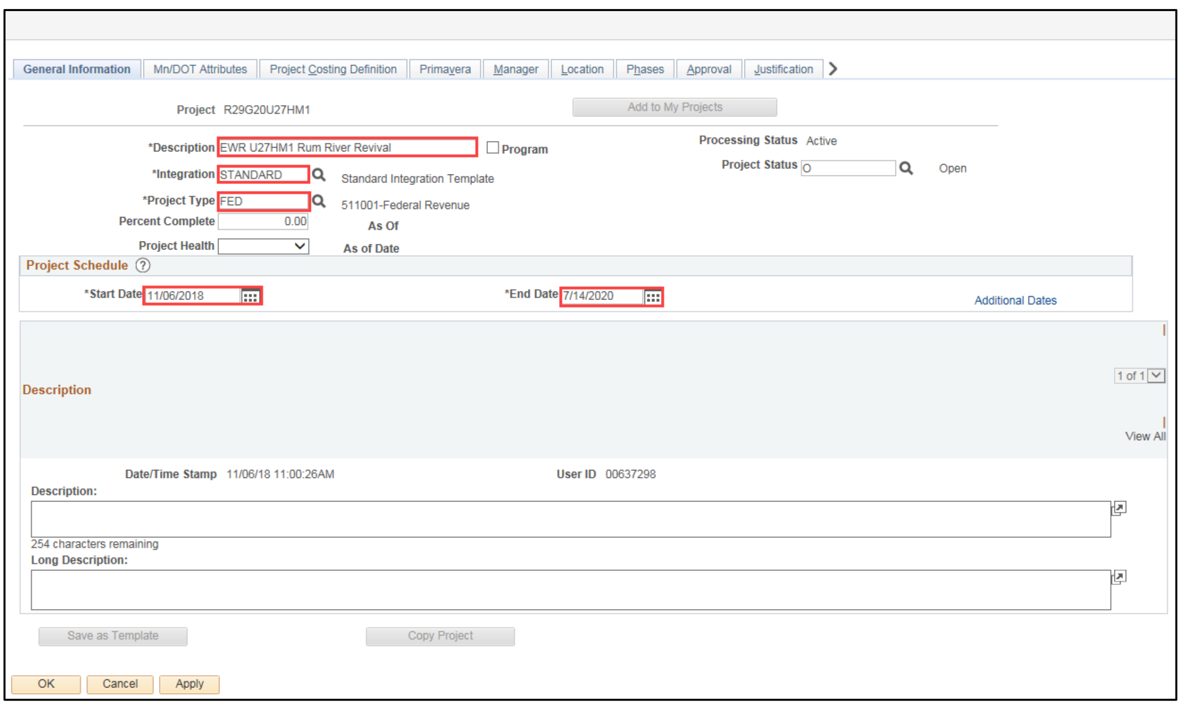
7. Click on the **Add** button. The projects *General Information* page displays in a pop-up window.



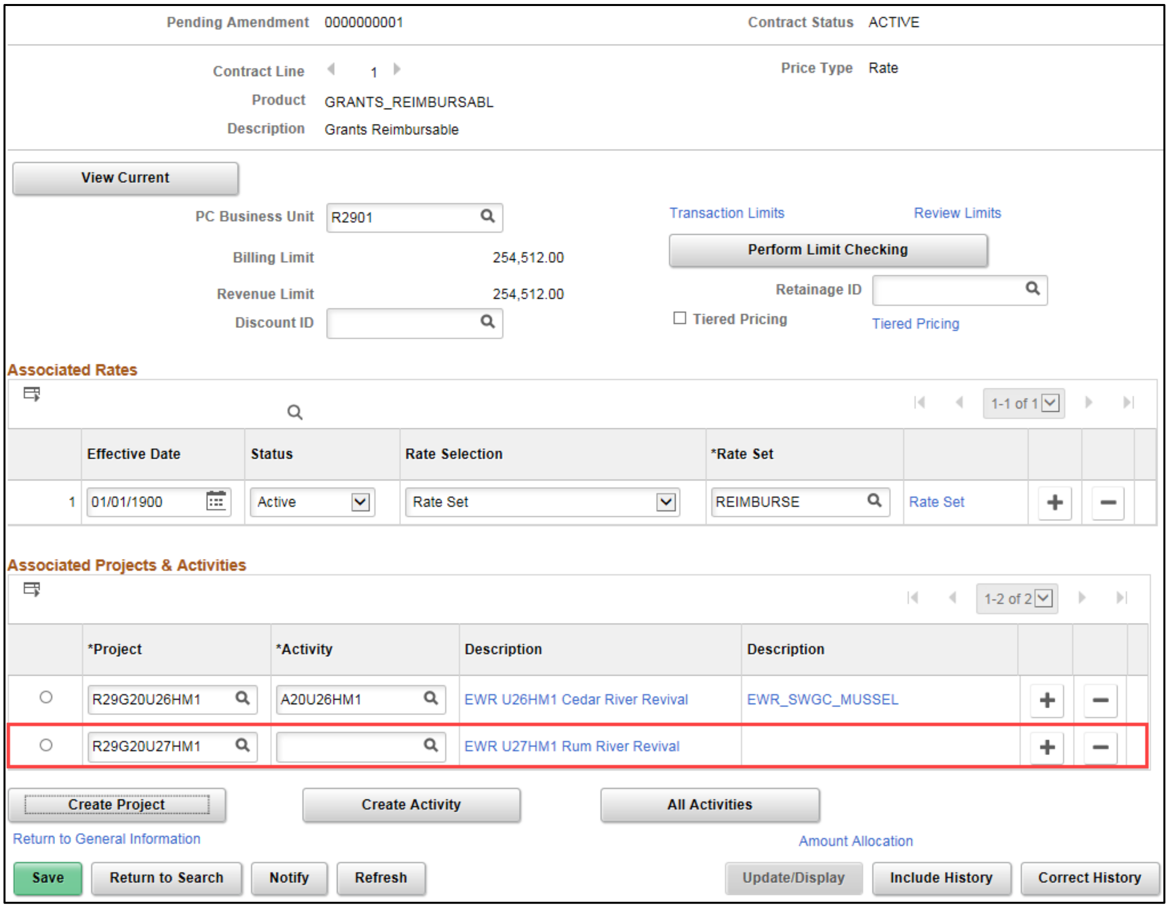
8. Complete the *Project General Information* page as described below:

Field Name	Field Description
***Description**	Enter the project Description. SWIFT places a default in this field of “Grants Reimbursable.” If you forget to change it, you can later navigate to Project General Information page and edit the field there.
***Integration**	Click on the **Lookup** icon and select “STANDARD”.
***Project Type**	Enter the *Project Type*. Select the option that describes the source of funding and how the revenue is recognized. Options that display will vary by agency. Common options include: FED – 511001 Federal Revenue FEDSG– 511002 Federal Sub-Grants INTR1– 511101 Intergovtl Grants-State INTR2– 511202 Intergovtl Grants – Other INTR3– 512605 Interagency Agreements OTHER– 511302 Other Revenue PRIVT– 511301 Private Grants

Field Name	Field Description
Start Date and End Date	Enter the project *Start* and *End Dates*. These do not necessarily have to match the start and end dates of the current project(s) on the award/contract. However, if the start or end date for this new project is outside the date range of the award and contract, you will need to change the dates of the award and contract to match. SWIFT will not do this for you automatically. For example, if the award and contract end on June 30, and the new project ends on July 31, you will need to change the award and contract end dates to July 31. **WARNING**! The *Start Date* impacts the initial Project Status Effective Date which affects payroll processing and cannot be changed. Refer to the "Add or Reduce Time to a Grant" guide for instructions. In this example, the new project dates are within the current contract dates, so no additional changes are required.
Long Description	Optionally, enter a *Long Description*. This may be the same or different than the Long Description for the Proposal.



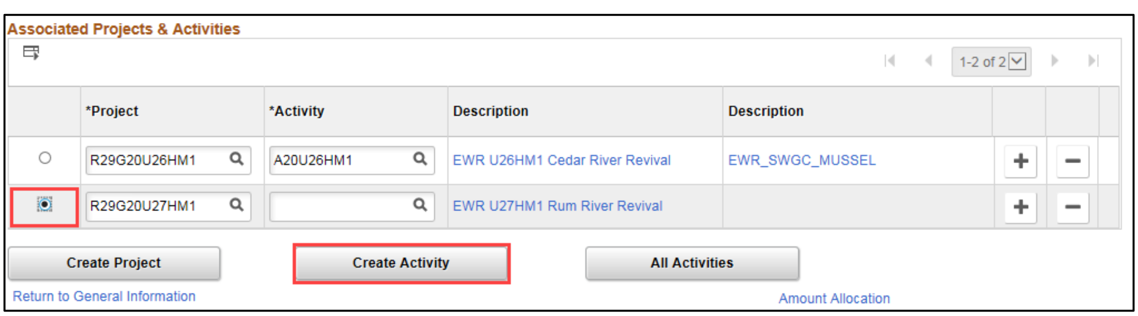
9. Click on the **OK** button.



- The project is added on the *Contract Terms* page. We will add a related activity in the next step.

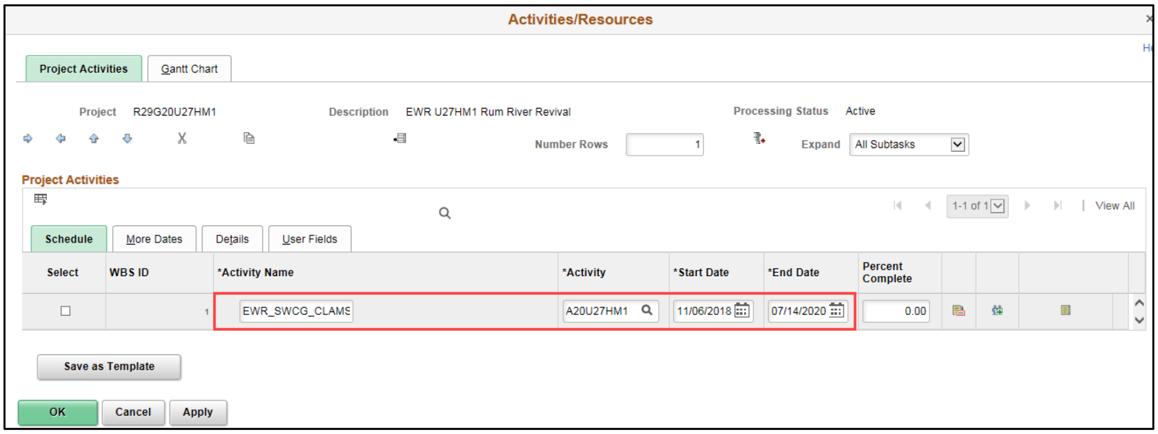
Step 3: Add Project Activities

1. Select the new project that you need to add an activity to by clicking on the **Select this Row** button.
   - If you want to add an existing Activity to the Project, click on the Activity **Lookup** icon and select the Activity. Then proceed to Step 4 and process the amendment.



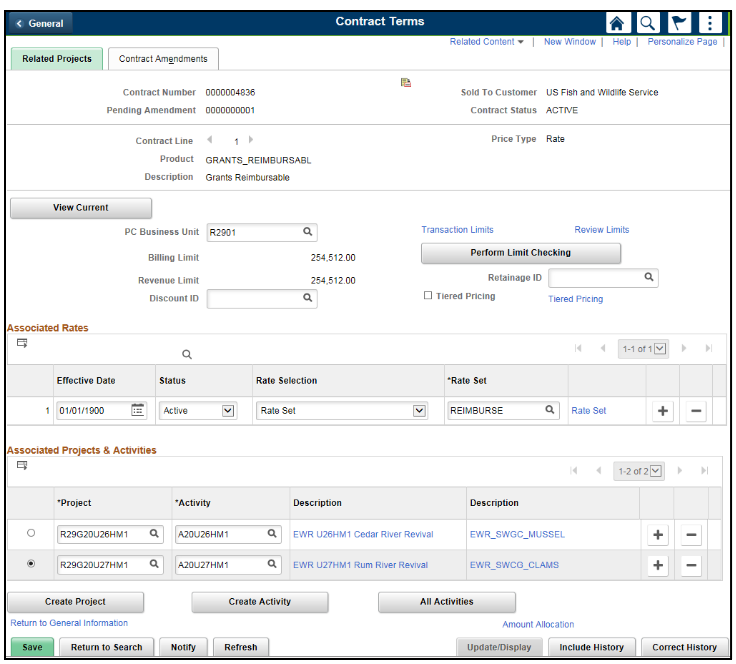
2. Click on the **Create Activity** button. The *Project Activities* page displays in a pop-up window.

3. Enter the new Activity information as described below.



Field Name	Field Description
***Description**	Enter the activity Description. Check with your agency for requirements.
***Activity**	Enter the Activity ID. Check with your agency for requirements.
Start Date and End Date	If your project has only one activity, as in this example, the activity dates must match the project dates. If you are adding 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.

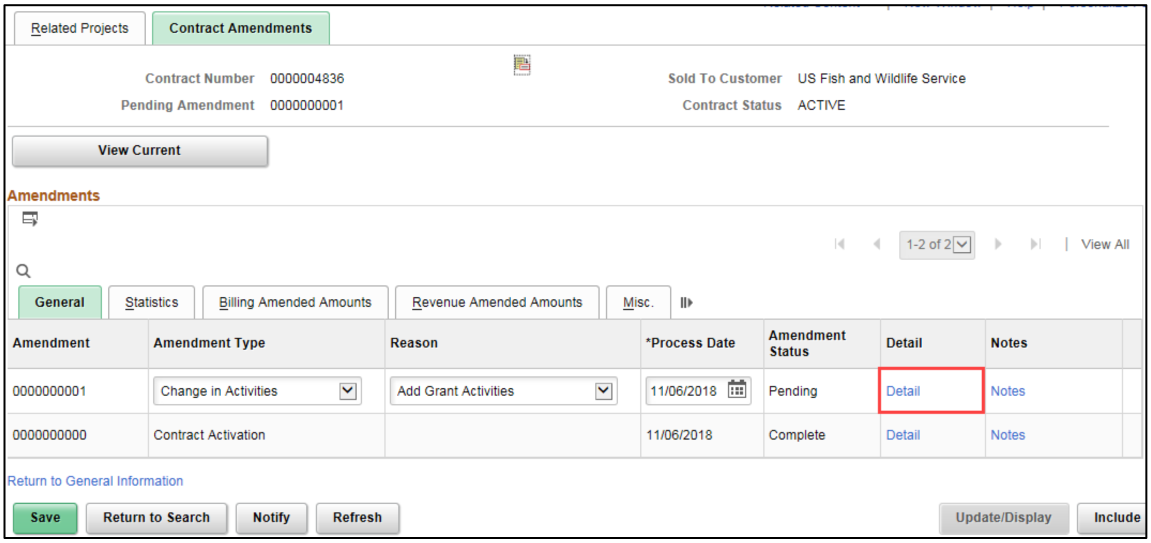
4. Click on the **OK** button to return to the *Contract Terms* - **Related Projects** tab.



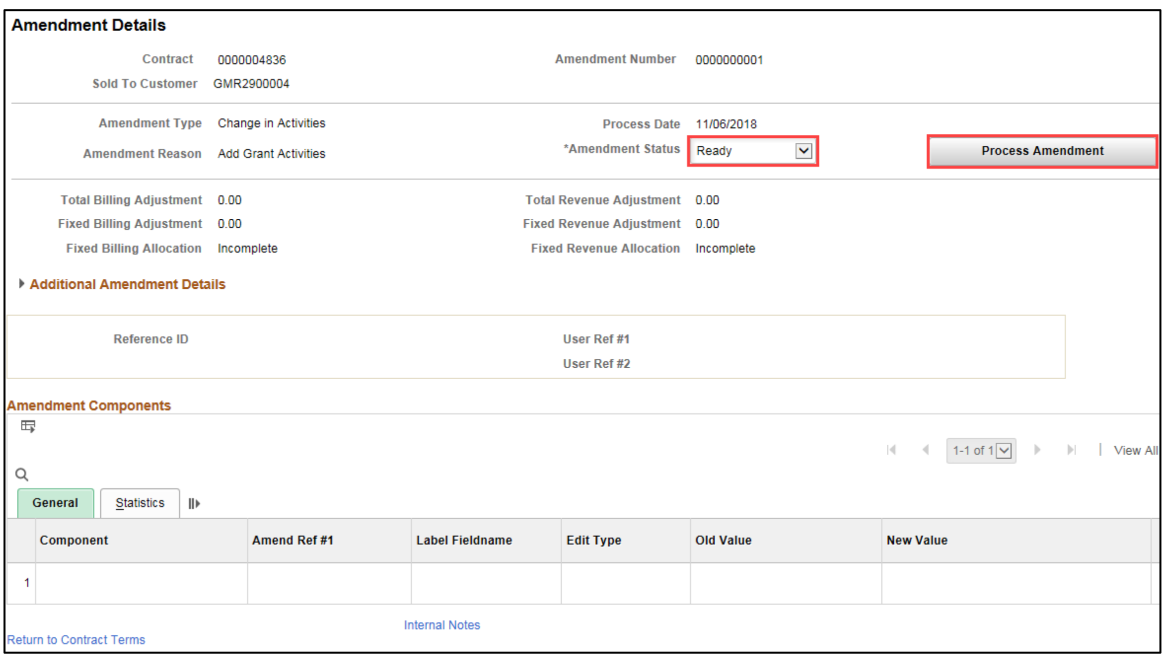
5. Click on the **Save** button.

Step 4: Complete Processing of the Amendment

1. Click on the **Contract Amendments** tab to finish processing the amendment.
2. Click on the *Detail* link for the Pending Amendment you created.



3. On the *Amendment Details* page, verify that the *Amendment Type* and *Reason* are correct. You can change them on this page, if necessary.



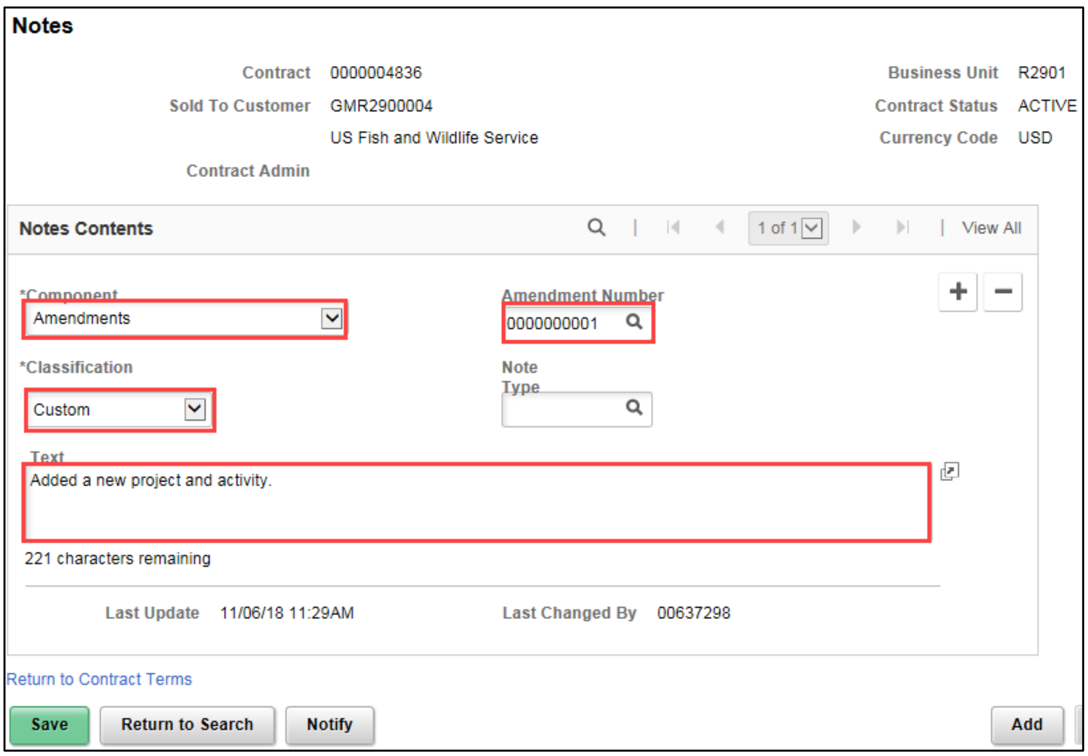
4. Change the *Amend Status* to "Ready".

   Note: When you change the *Amend Status* to "Ready" SWIFT locks the editable fields on the page, including the *Type* and *Reason*, and the **Process Amendment** button displays. If you realize there is an error, you can fix it by changing the *Amend Status* back to "Pending". After you click on the **Process Amendment** button in the next step, you won't be able to make changes to this amendment. You would need to create a new amendment to make further changes or undo what you have done.

5. When you are ready, click on the **Process Amendment** button. The *Amend Status* is updated to "Complete".
6. Click on the *Return to Contract Terms* link at the bottom of the page. You are returned to the **Related Projects** tab.
7. Click on the **Contracts Amendments** tab.

Step 5: Add a Contract Note

1. Add a contract note to describe the change you made. Click on the *Notes* link for the amendment. The *Notes* page displays.



2. Complete the *Notes* page as follows:

Field Name	Field Description
***Component**	Select "Amendments".
***Amendment Number**	Click on the Lookup and select the Amendment Number you created.
***Classification**	Select "Custom".
Note Type	Minnesota does not use.

Field Name	Field Description
***Text**	Enter a note describing the change you made.

3. Click on the **Save** button.

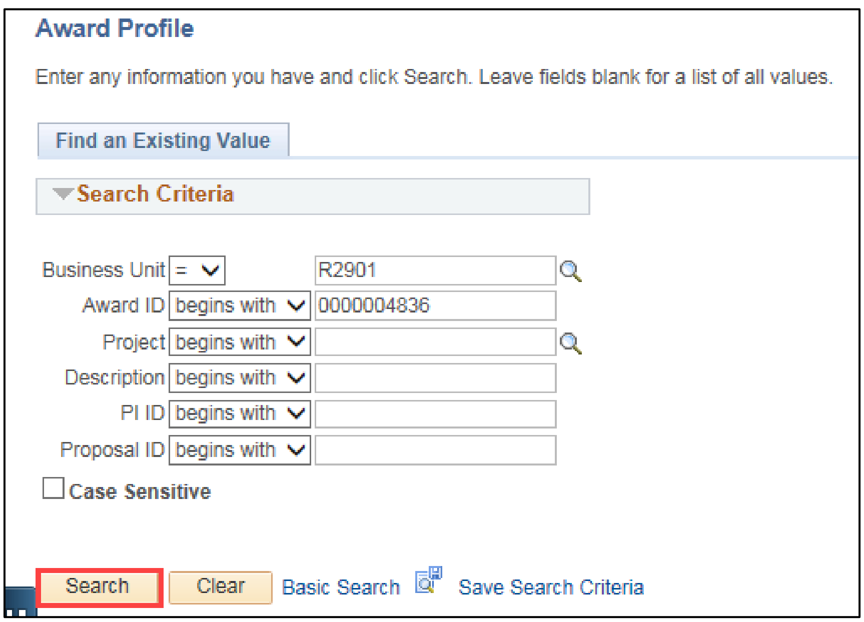
Step 6: Update the Budget Period Dates

Note: This step does not apply if you are only adding activities to an existing project.

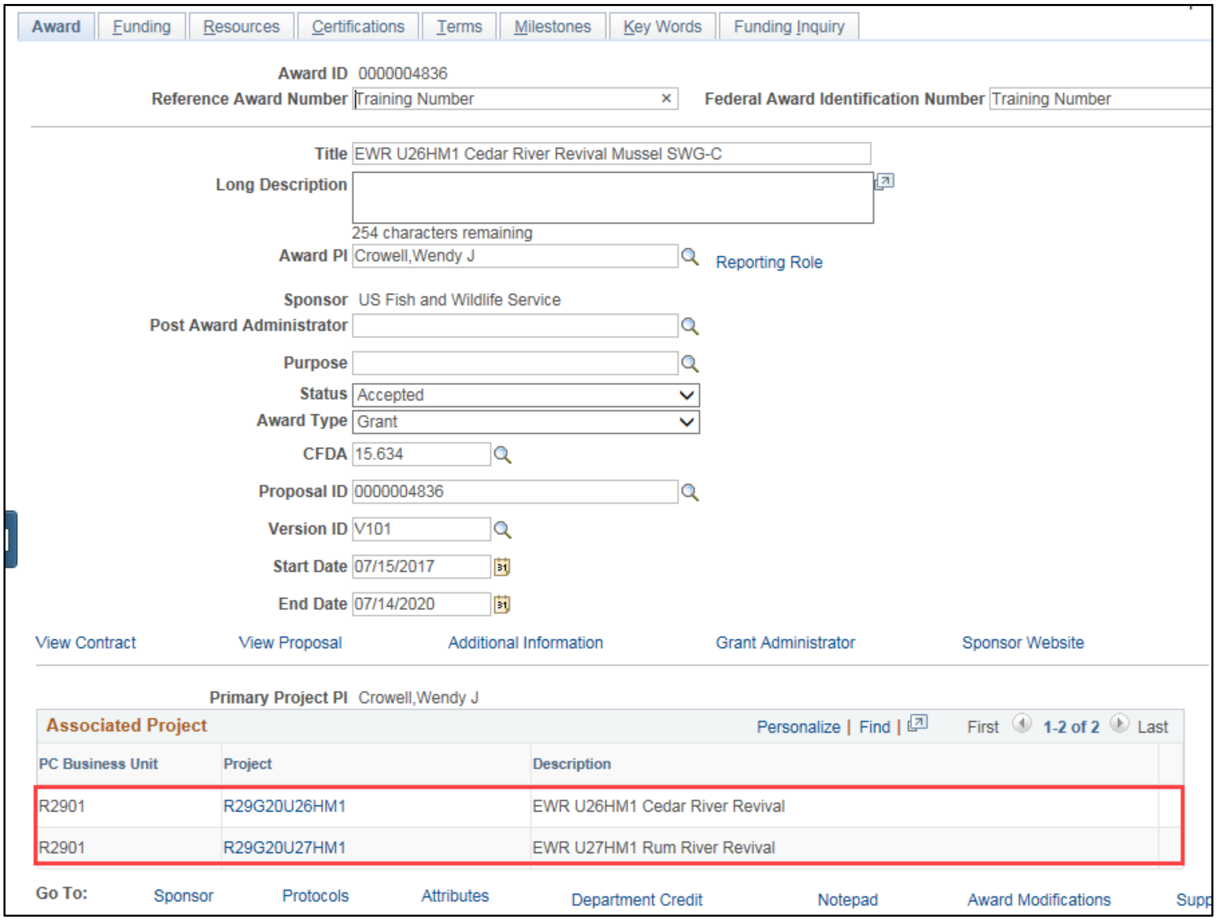
1. Navigate to the *Award Profile* page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left-menu, Links section, Maintain Award, Award Profile.

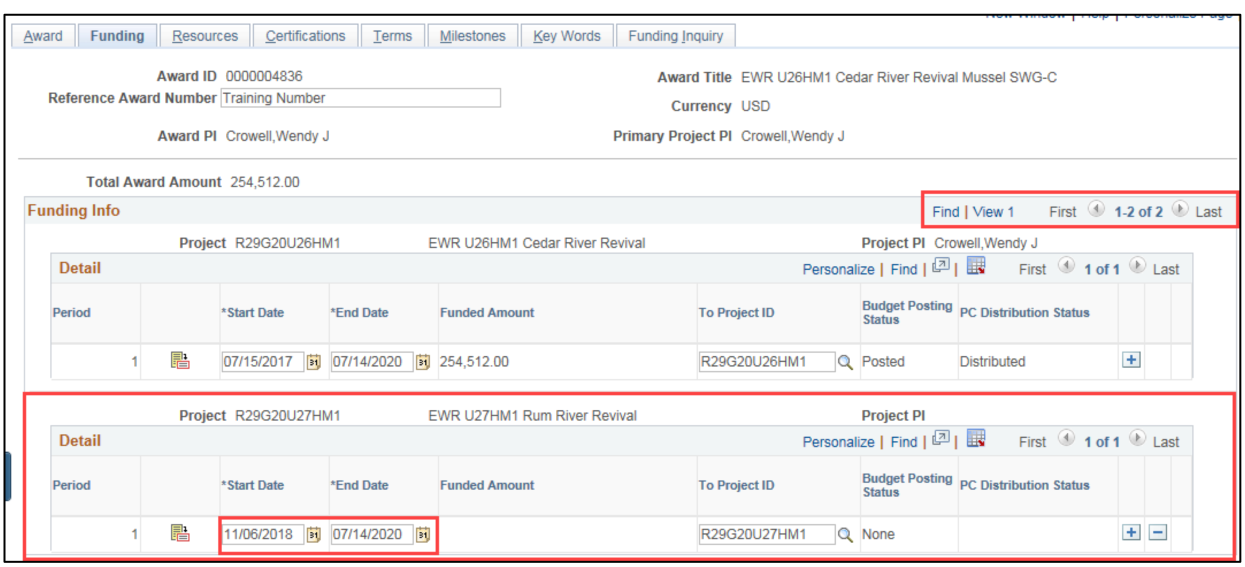
2. At the *Award Profile* page, verify the *Business Unit* and enter the *Award ID* for the award you want to update. (You can also search by Project ID, Description, and Proposal ID.)



3. Click on the **Search** button. The *Award Profile* page displays.



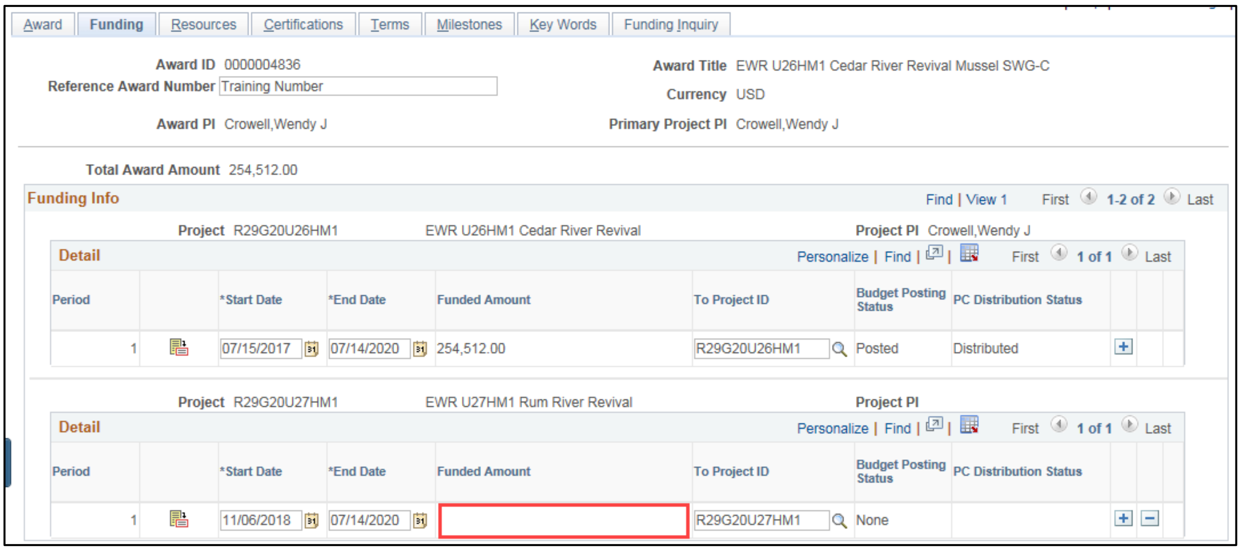
4. Click on the **Funding** tab.
5. Navigate to the new project record by clicking on the **Arrow** or by clicking on the **View All** in the **Finding Info** section.



6. Enter the Project *Start Date* and *End Dates* to create the associated Budget Period Start and End dates. These dates for a new project will be blank. You should enter the same dates you used when setting up the new project and activity when completing the contract amendment.
7. Click on the **Save** button.

Step 7: Create Project Budget

The funded amount for the new Project is blank. You will need to create a Project Budget in order to populate this field.



Generally, funding changes will come from the Grantor, and what the Grantor dictates will determine how a new project will be funded.

- If there are no additional funds to cover the cost of the new project, this will involve reallocating funds from the original project to the new project. Refer to the "Redistribute Project Budgets" guide for assistance.
- If there are additional funds to cover the costs of the new project, you will need to add a Project Budget, enter a Contract Amendment, and Update the Billing Limit. Refer to the "Add or Reduce Grant Funding" guide for detailed instructions.