

QUICK REFERENCE GUIDE

February 20, 2024

Inactivate a Project Activity

This guide covers how to inactivate a project activity by updating the Processing Status field to “Inactive”. You can inactivate an activity if it was created in error or you no longer want transactions to be charged to it. If you are closing the Project, refer to the [“Close and Reopen Projects”](#) guide for instructions.

Step 1: Adjust the Activity Budget if Necessary

You should view the Project Budget and verify if it needs to be adjusted. For example, you may need to move budget from the Activity that you are inactivating to another Activity. Refer to the [“Redistribute Project Budgets”](#) guide for instructions. If you need to adjust the activity budget amount, you must do this before inactivating the activity. If you inactivate the activity first, you will encounter an error when finalizing the budget, and it will not complete the finalization process correctly.

Note: SWIFT will not warn you that the Activity has a budget.

Step 2: Update the Activity Processing Status Field to Inactive

You will drill down to the General Information page for the activity from the project.

1. Navigate to the Project Information page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards, left menu, Project.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Maintain Award, Project General Information.

2. On the **Find an Existing Value** tab of the Project General page, verify the Business Unit and enter the Project ID in the Project field.
3. Select the **Search** button.

Project General

Find an Existing Value

▼ **Search Criteria**

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

Recent Searches Saved Searches

Business Unit =

Project begins with

Description begins with

Program =

Processing Status =

^ Show fewer options

Case Sensitive Include History

Search Clear

4. On the project General Information page, select the Project Activities link at the bottom of the page.

General Information Project Department Project Costing Definition Manager Location Phases Approval Justification >

Project H55231477 [Add to My Projects](#)

*Description Program Processing Status Active

*Integration Standard Integration Template

*Project Type 511001-Federal Revenue

Percent Complete As Of

Project Health As of Date Contract Number: 0000009487

Project Schedule

*Start Date Control Start *End Date Control End Date Additional Dates

Description | < > 1 of 1 | View All

Date/Time Stamp: 09/28/23 10:08:07AM User ID: 01108109

Description:

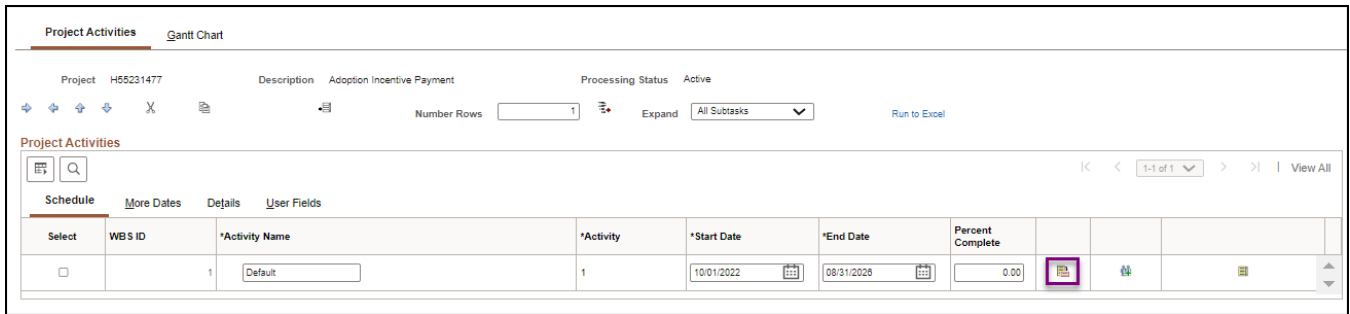
228 characters remaining

Long Description:

[Save as Template](#) [Copy Project](#)

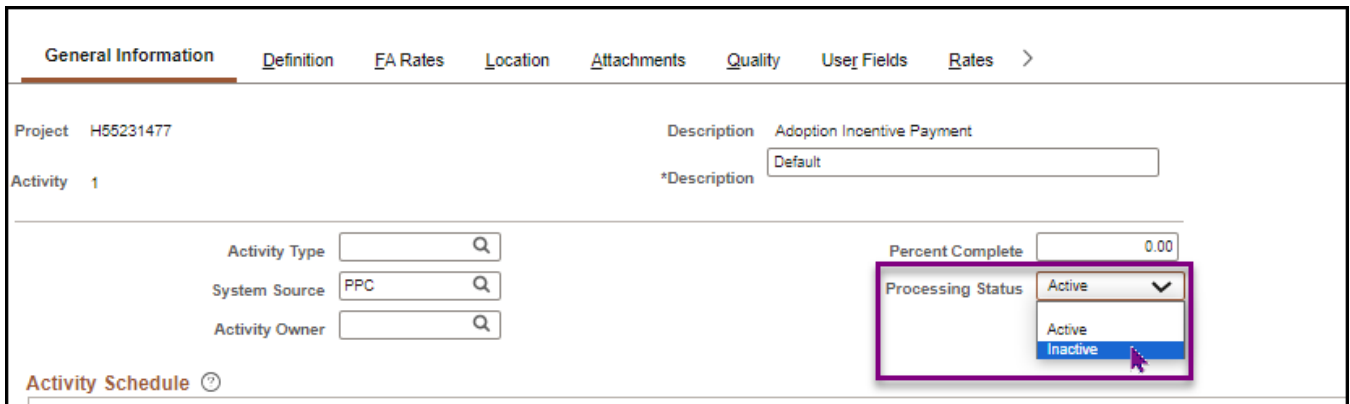
My Projects Project Valuation Project Team **Project Activities** Go To

5. On the Project Activities page, select the **Activity Definition** () icon for the activity you want to inactivate.



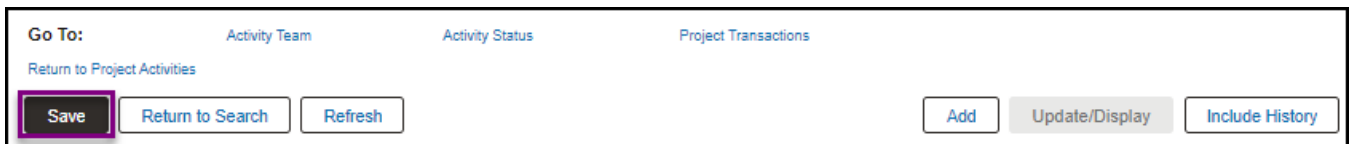
The screenshot shows the 'Project Activities' page. At the top, there are tabs for 'Project Activities' and 'Gantt Chart'. Below the tabs, there is a header section with 'Project H55231477', 'Description Adoption Incentive Payment', and 'Processing Status Active'. A table below shows a single activity with columns for 'Select', 'WBS ID', '*Activity Name', '*Activity', '*Start Date', '*End Date', and 'Percent Complete'. The 'Percent Complete' column has a value of 0.00. A red box highlights the 'Activity Definition' icon (a document with a red 'X') in the table row.

6. At the Activity General Information page, select the the Processing Status drop-down and select "Inactive".



The screenshot shows the 'General Information' page for an activity. The page has tabs for 'General Information', 'Definition', 'FA Rates', 'Location', 'Attachments', 'Quality', 'User Fields', and 'Rates'. The 'General Information' tab is selected. Below the tabs, there is a header section with 'Project H55231477', 'Description Adoption Incentive Payment', and 'Activity 1'. Below the header, there are several input fields: 'Activity Type', 'System Source' (with value 'PPC'), 'Activity Owner', and 'Percent Complete' (with value '0.00'). A red box highlights the 'Processing Status' dropdown menu, which is currently set to 'Active'. The dropdown menu is open, showing 'Active' and 'Inactive' options. A mouse cursor is pointing at the 'Inactive' option.

7. Scroll to the bottom of the page and select the **Save** button.



The screenshot shows the bottom of the page. There is a 'Go To:' section with links for 'Activity Team', 'Activity Status', and 'Project Transactions'. Below this, there is a 'Return to Project Activities' link. At the bottom, there are several buttons: 'Save', 'Return to Search', 'Refresh', 'Add', 'Update/Display', and 'Include History'. A red box highlights the 'Save' button.