SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

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.

Steps to complete:

- Step 1: Adjust the Activity Budget if Necessary

- Step 2: Update the Activity Processing Status Field to Inactive

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 "Adjust a Project Budget" 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.

1. Navigate to the *Budget Plan* page using one of the options described below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Project Costing, Manage Projects, left-menu, Project Budget, Budget Plan.
WorkCenter	Accounting, Project Costing, Projects WorkCenter, left-menu, Links section, Project Setup, Budget Plan.

2. On the **Find an Existing Value** tab of the *Budget Plan* search page, search for and select the Project that you want to update.

3. At the *Budget Plan* page, click on the **Budget Detail** icon to display the *Budget Detail* page.

Step 2: Update the Activity Processing Status Field to Inactive

1. Navigate to the *Project Activities* page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Project Costing, Manage Projects, left-menu, Project Activity, Project Activities.
WorkCenter	Accounting, Project Costing, Project WorkCenter, left-menu, Links section, Project Setup, Project Activities.

2. On the **Find an Existing Value** tab of the *Project Activities* page, search for and select the Project that you want to update.

Project Activities

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

| Find an Existing Value |

▼ Search Criteria

Business Unit = ▼ G0201 🔍

Project begins with ▼ G02RC25GV0031 🔍

Description begins with ▼ [   ]

Processing Status = ▼ [   ] ▼

☐ Case Sensitive

[**Search**] [Clear]   Basic Search 🔲 Save Search Criteria

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

4. At the *Project Activities* page, click on the Activity Definition (🔲) icon for the Activity that you want to inactivate.

| Project Activities | Gantt Chart |

Project G02RC25GV0031   Description Roof and Exterior Repair   Processing Status Active

➡ ⬆ ⬆ ⬇   ✖   📋   🔳   Number Rows [1]   🔳+   Expand All Subtasks ▼

Project Activities

🔳 🔍   ◄ ◄ 1-3 of 3 ▼ ► ►| | View All

| Schedule | More Dates | Details | User Fields |

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete			
☐	1	Construction	2	12/01/2018	11/30/2022	0.00	📄	🏛	📊
☐	2	Study	6	12/01/2018	11/30/2022	0.00	📄	🏛	📊
☐	3	Emergency	5	12/01/2018	11/30/2022	0.00	📄	🏛	📊

5. On the *General Information* page for the Activity, click on the the *Processing Status* drop-down and select "Inactive".

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