

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.

Budget Plan

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

Find an Existing Value Add a New 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. At the *Budget Plan* page, click on the **Budget Detail** icon to display the *Budget Detail* page.

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 1-7 of 7 Last

Status	WBS ID	Activity Name/Budget Item	Budget Items	Spread Option	Percent	Budget Adjustment	Distributed Budget	Target Budget	Undistributed Adjustment	Even Spread	Other	ALL
✓		Roof and Exterior Repair		Select Spread		0.00	140,000.00	140,000.00	0.00			
	1	Construction		Select Spread		0.00	90,000.00	90,000.00	0.00			
✓		All Budget Items				0.00	100,000.00	100,000.00	0.00	Even Spread	Other	100,000.00
✓		All Budget Items				0.00	-10,000.00	-10,000.00	0.00	Even Spread	Other	-10,000.00
	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	50,000.00
	3	Emergency				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

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.

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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 =

Project begins with


Description begins with

Processing Status =

Case Sensitive

[Basic Search](#)

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 deactivate.










Project Activities | Gantt Chart

Project: G02RC25GV0031 | Description: Roof and Exterior Repair | Processing Status: Active

Number Rows: 1 | Expand: All Subtasks

Project Activities

Schedule | More Dates | Details | User Fields

Select	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete			
<input type="checkbox"/>	1	<input type="text" value="Construction"/>	2	<input type="text" value="12/01/2018"/>	<input type="text" value="11/30/2022"/>	0.00			
<input type="checkbox"/>	2	<input type="text" value="Study"/>	6	<input type="text" value="12/01/2018"/>	<input type="text" value="11/30/2022"/>	0.00			
<input type="checkbox"/>	3	<input type="text" value="Emergency"/>	5	<input type="text" value="12/01/2018"/>	<input type="text" value="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".

The screenshot displays the 'General Information' tab for an activity. The project is G02RC25GV0031 and the activity is 5. The description is 'Roof and Exterior Repair' with a sub-description of 'Emergency'. The 'Processing Status' is set to 'Inactive', which is highlighted with a red box. Other fields include 'Activity Type', 'System Source' (PPC), 'Activity Owner', 'Percent Complete' (0.00), and 'Activity Schedule' with start and end dates. The 'Description' section shows a date/time stamp of 11/13/18 3:19:30PM and a user ID of 00272877. At the bottom, the 'Save' button is highlighted with a red box, along with other buttons like 'Return to Search', 'Refresh', 'Add', 'Update/Display', and 'Include History'.

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