



Close a Project - Process Help

Use these instructions to close a project. Refer to the procedure and guidance documents for criteria to close a project.

Prerequisites

- You must have one of the following responsibilities to close a project:
 - ORG OGM Billing Specialist
 - ORG Account Establishment Specialist
 - ORG Account Establishment Specialist with Budget Approvals
 - ORG Account Establishment Administrator
- The corresponding award is being closed and the project is not continuing.
- The project has termed.

To close a project:

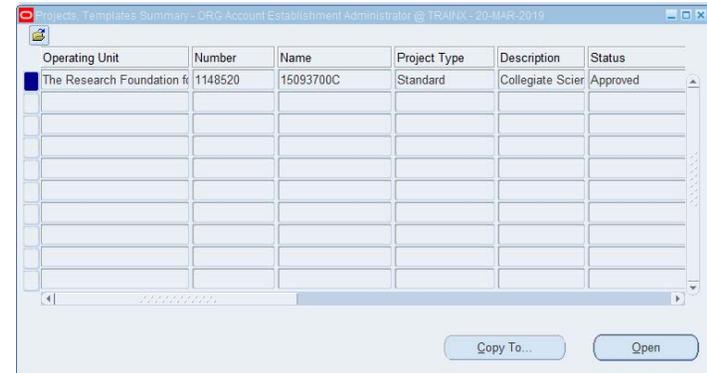
1. Navigate to **Projects** to open the **Find Projects** form.
2. Enter the **Project** number.
3. Click **Find** to open the Project, Templates Summary form.

The screenshot shows a web-based form titled "Find Projects". The form is organized into several sections:

- Project:** Contains a "Search For" dropdown menu (set to "Projects, Templates"), a "Number" field (containing "1148520"), and several empty text input fields for "Name", "Long Name", "Type", "Organization", "Status", "Product Source", and "Source Reference".
- Key Member:** Contains three empty text input fields for "Name", "Number", and "Role".
- Customer:** Contains three empty text input fields for "Name", "Number", and "Relationship".
- Classification:** Contains two empty text input fields for "Category" and "Class Code".

At the bottom right of the form, there are two buttons: "Clear" and "Find".

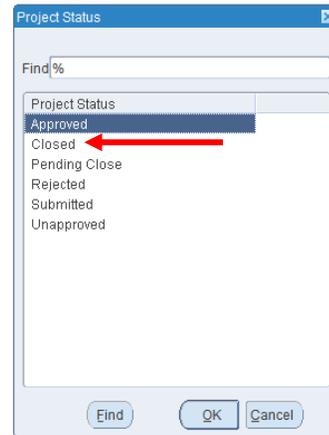
4. Click **Open** to open the Project Templates form.



5. Click the **Change Status** button.

6. Chose **Closed** from the list of values.

7. Click **OK**.



8. Click **File > Save** to save your changes.

9. Click **File > Close Form**.

