

## 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:
  - o ORG OGM Billing Specialist
  - o ORG Account Establishment Specialist
  - ORG Account Establishment Specialist with Budget Approvals
  - o 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.

| Find Projects    |                     |   |              | -    |
|------------------|---------------------|---|--------------|------|
| Project          |                     |   | Key Member   |      |
| Search For       | Projects, Templates | - | Name         |      |
| Number           | 1148520             |   | Number       |      |
| Name             |                     |   | Role         |      |
| Long Name        |                     |   |              |      |
| Туре             |                     |   |              |      |
| Organization     |                     |   |              |      |
| Status           |                     | - | Customer     |      |
| Product Source   |                     |   | Name         |      |
| Source Reference |                     |   | Number       |      |
|                  |                     |   | Relationship |      |
| Classification   |                     |   |              |      |
| Category         |                     |   |              |      |
| Class Code       |                     |   |              |      |
|                  |                     |   |              |      |
|                  |                     |   | Clear        | Find |

- 4. Click **Open** to open the Project Templates form.
- 2 Operating Unit Number Name Project Type Description Status The Research Foundation fc 1148520 15093700C Standard Collegiate Scier Approved 4 Copy To. Open Operating Unit The Research Foundation for SU Number 1148520 Name 15093700C Type Standard Organization 030 Center for Academic Developr Long Name 15093700C \_ 30-JUN-2019 Trans Duration 01-JUL-2018 Status Approved Project Status Description Collegiate Science and Technology Entry I Workflow in Process Public Sector Template [.] Change Status Pending Close Options Option Name Tasks Classifications Key Members Transaction Controls + Billing Information + Bill Rates and Discount Overrides OK Cancel (Eind)
- 5. Click the Change Status button.
- 6. Chose **Closed** from the list of values.

Find %

Approved

Closed <

Rejected

Submitted Unapproved

- 7. Click OK.
- 8. Click File > Save to save your changes.
- 9. Click File > Close Form.

Detail