

9.2 Closing or Reopening a Grant or Project

Purpose: Reference this QRG to learn how to close a Grant Award at the 'Project' or 'Activity' levels and reopen/reactivate them in the ctcLink Grants Module.

Audience: Finance/Grant Fiscal Staff.

! You must have at least one of these local college managed security roles:

- ZC Awards Processing
- ZZ Awards Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

When should you close a Project or Activity?

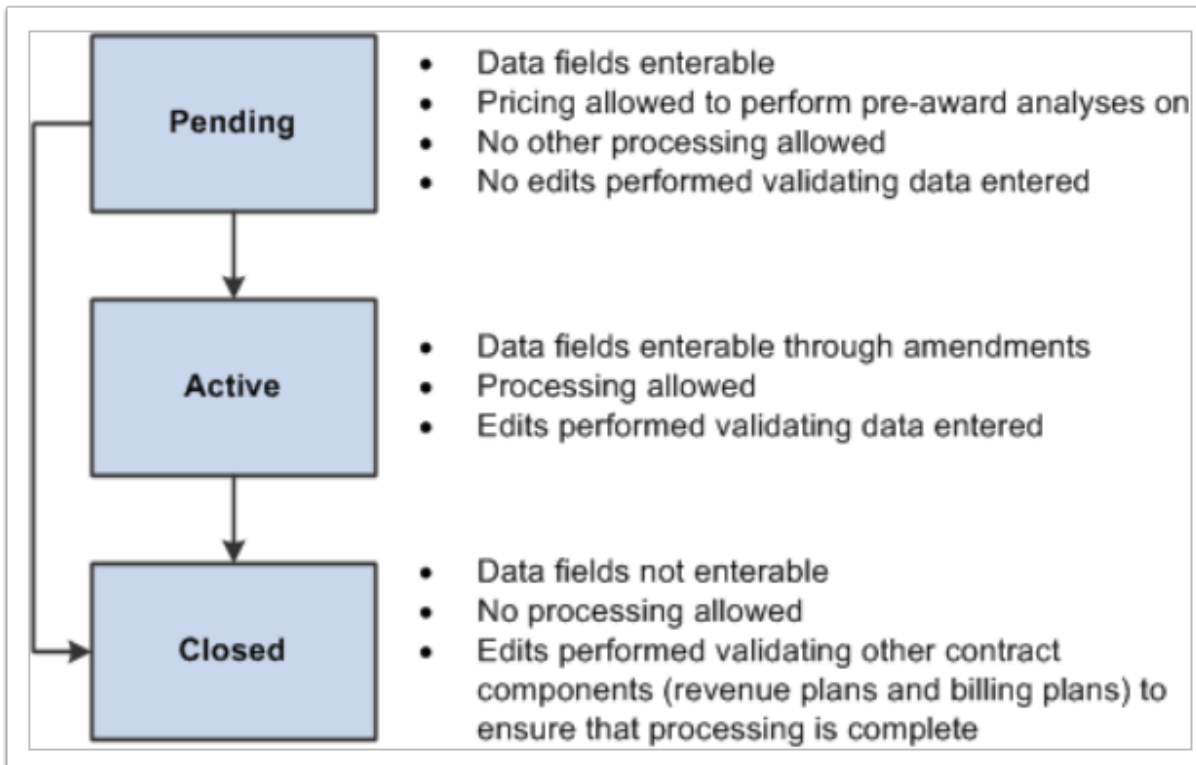
You can control incoming transactions at the project or activity level. Projects and activities that have an inactive processing status do not appear in the prompt lists of PeopleSoft cost feeder systems. Inactivating a project or activity effectively shuts off the flow of all transactions to Project Costing for that particular project or activity. Projects/Activities can be inactive and then made active again if necessary.

When should you close a Contract?

It is rarely recommended that you close a Contract. Closing Contracts is a one way flow; once a Contract is closed it cannot be re-opened, which will limit your ability to bill for any previously unknown expenses. There are no systems checks that prohibit you from changing the status of a contract from Pending to Closed. Closing at the Project or Activity level is recommended.

Closing a Grant or Project

- ❗ Suggested to never close a Contract. Once a Contract ID# is closed, it can never be opened again. Closing at the Project or Activity level is recommended.



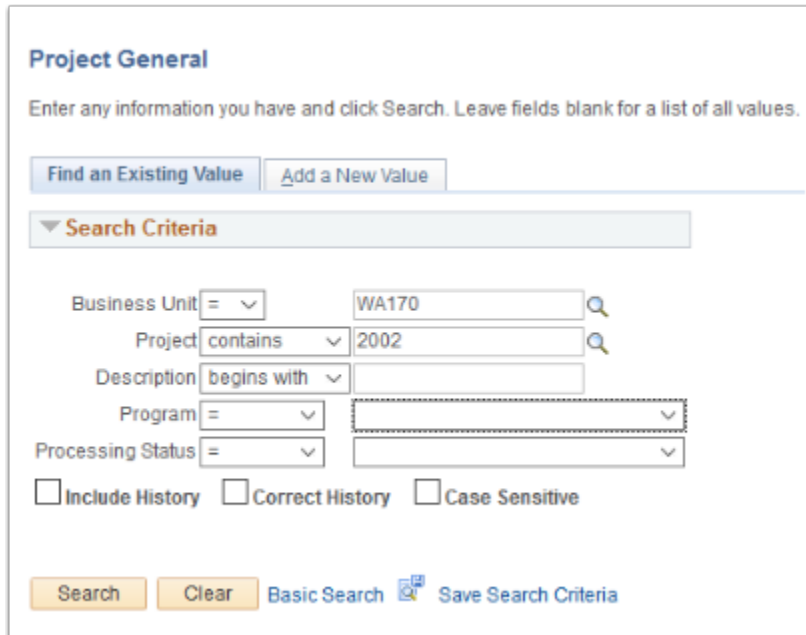
Closing Best Practices

- 💡 Closing a Project or Activity ensures that no additional expenses or other transactions can occur for that Project or Activity.
- Before closing a Project or Activity, reconcile your actual expenses to reimbursements/revenues received. Make any adjustments needed prior to closing of the fiscal year and also the closing of project and/or activity. When a project or an activity is closed, no further adjustments can be made unless it is re-opened.
- In the Contract you can reduce the Billing Limit to zero and keep the Contract open in case a transaction is inadvertently associated with a project. It is best to keep Contracts active and close them at the Project or Activity level.

Closing an Award at the Project Level

Navigation: NavBar > Navigator > Grants > Awards > Project

1. On the **Project General** search page, enter or look up the **Business Unit**.
2. Enter or look up the **Project**.
3. Select **Search**. The **Project General** page will display.



4. On the **General Information** tab, select the **Project Status** link "**Open**". The **Status** Page will display.

General Information | Project Department | Project Costing Definition | Primavera | Manager | Location | Phases | Approval | Justification | User Fields | Rates |

Project 0000002002 Add to My Projects Project Hierarchy

*Description ☐ Program Processing Status: Active
 *Integration WA170 Template **Project Status: Open**
 Project Type Intercollege Reimbursement
 Percent Complete 0.00 As Of
 Project Health As Of Contract Number: 0000000000000000347

Project Schedule

*Start Date *End Date Additional Dates

Description Find | View All | First | 1 of 1 | Last

Date/Time Stamp 09/05/18 11:58:12AM User ID CTC_KCLARK

Description:

 239 characters remaining
 Long Description:

Save as Template Copy Project

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

Save Return to Search Refresh Add Update/Display Include History Correct History

5. Select the **plus sign (+)** icon.

Status

Project 0000002002 Description Proposal Title

Project Status 1 of 1 | View All

Effective Date Sequence

*Status Open

Priority

Interest Calculation Factor

Comments

[Return to Project General](#)

Save Return to Search Notify Refresh Update/Display Include History

6. Enter an **Effective Date**, Change the **Status** (a comment can be added if needed).

7. Select **Save**.

8. Select the **Return to Project General** link.

Status

Project 0000002002 Description Proposal Title

Project Status Q | ◀ | ▶ | 1 of 2 | View All

Effective Date 09/10/2018 📅 Sequence 0 + -

*Status C Q Closed

Priority 0

Interest Calculation Factor 0.00

Comments

[Return to Project General](#)

Save Return to Search Notify Refresh Update/Display Include History

⚠ You may receive a warning message, this message is just informing you of the start and end date of the project as determined in the proposal.

Warning — Date: 2020-09-10 is not between Project Start date: 2018-09-01 and Project End date: 2020-08-31. (13100,495)

Please change date or modify Project Start or End dates.

OK Cancel

9. Note that the **Project Status link** is now "**Closed**"

General Information	Project Department	Project Costing Definition	Primavera	Manager	Location	Phases	Approval	Justification	User Fields	Bates	
Project 0000002002						Add to My Projects		Project Hierarchy			
*Description Proposal Title			<input type="checkbox"/> Program			Processing Status Inactive					
*Integration INTGRN_TM			WA170 Template			Project Status: Closed					
Project Type 66099			Intercollege Reimbursement								
Percent Complete 0.00			As Of								
Project Health			As Of			Contract Number: 0000000000000000347					
Project Schedule											
*Start Date 09/01/2018			*End Date 08/31/2020			Additional Dates					
Description											
Date/Time Stamp 09/05/18 11:58:12AM			User ID CTC_KCLARK			Find View All First 1 of 1 Last					
Description:											
Proposal Title											
239 characters remaining											
Long Description:											
Project Long Description											
Save as Template			Copy Project								
My Projects		Project Valuation		Project Team		Project Activities		Go To More			
Save		Return to Search		Refresh		Add		Update/Display		Include History	
										Correct History	

- 💡 If you need to reopen a project you can do the same steps as above, but select a status of **Open (O)**.
- It is suggested that the open date be the day after the close date.
- Projects can be closed and opened as many times as needed.

Closing an Award at the Activity Level

Navigation: NavBar > Navigator > Grants > Awards > Project Activity

1. On the **Project Activity** search page, enter or look up the **Business Unit**.
2. Enter or look up the **Project**.
3. Select **Search**. The **Project Activity** page will display

Project Activity

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 =

Project begins with

Activity begins with

WBS ID begins with

Project Description begins with

Activity Description begins with

Activity Type begins with

Processing Status =

Activity Owner begins with

New Milestone =

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

4. On the **General Information** tab, select the **Processing Status** to inactivate the activity.
5. Select **Save**.

General Information Definition EA Rates Location Attachments Quality User Fields Bates Budget Alerts >

Project 0000002002 Description Proposal Title

Activity ACT_1 *Description Proposal Title

Activity Type

System Source PPC

Activity Owner 101003109 Casey Wood

Percent Complete 0.00

Processing Status

Activity Schedule ⓘ

*Start Date 09/01/2018

*End Date 08/31/2020

Baseline Start Date

Baseline Finish Date

Early Start Date

Early Finish Date

Actual Start Date

Actual Finish Date

Late Start Date

Late Finish Date

Description ⓘ

Q | | | 1 of 1 | View All

Date/Time Stamp 09/10/18 11:58:57AM User ID CTC_KCLARK

Description

254 characters remaining

Long Description

Go To: [Activity Team](#) [Activity Status](#) [Project Transactions](#)

💡 You can then make an activity active or inactive as many times as needed.

6. Note that the **Processing Status** is now "Inactive".

Project Activity

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 = WA170

Project begins with 0000002002

Activity begins with ACT_1

WBS ID begins with

Project Description begins with

Activity Description begins with

Activity Type begins with

Processing Status =

Activity Owner begins with

New Milestone =

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All 1-1 of 1

Business Unit	Project	Row Number	WBS ID	Activity	Project Description	Activity Description	Activity Type	Processing Status	Activity Owner	New Milestone
WA170	0000002002	1	1	ACT_1	Proposal Title	Proposal Title	(blank)	Inactive	101003109	(blank)

7. Process complete.

- 💡 If you need to reopen an activity you can do the same steps as above, but select a status of Active.
- Activities can be inactivated and reactivated as many times as needed.