

QUICK REFERENCE GUIDE

February 20, 2024

Close and Reopen Grant Projects

This guide covers how to change a grant Project Status. The Project Status is used to close or reopen the project.

After all costs have been processed through, including the General Ledger journals for those items, the grant project should be closed (inactivated).

Closing or reopening a grant involves changing the grant Project Status. When you change the project status to "Close", the project is inactivated, and no transactions can be processed for the grant. In order to process additional transactions for the grant, you would need to change the project status back to "Open."

Note: If you attempt to enter a status with a date outside of the Project Start and End Date, you will receive a warning; however, you will be able to save the status.

Before changing the Project Status to "Closed", you may want to use the "Pending Close" status to limit the transactions that can be processed for the grant project. A complete Status listing is provided in this guide.

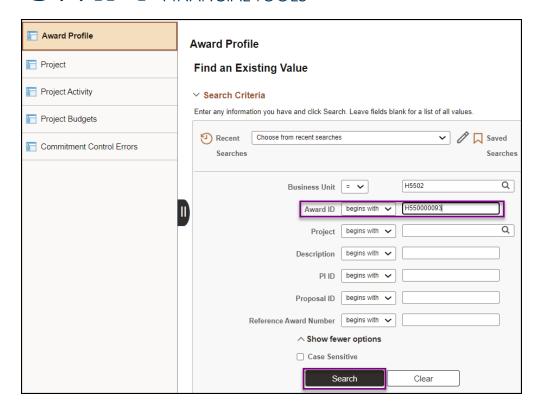
Step 1: Update the Project Status

1. Navigate to the Award Profile page using one of the options below:

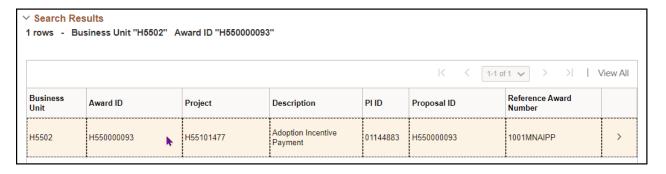
Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Maintain Award, Award Profile.

- 2. At the Award Profile page, verify the Business Unit and enter the Award ID for the award you want to update. You can also search by Project ID, Description, and Proposal ID.
- 3. Select the Search button.

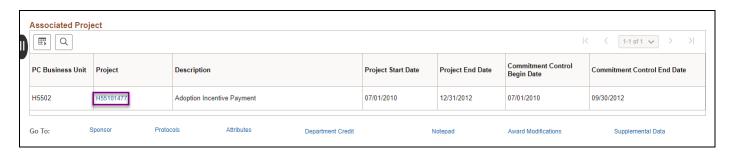
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4. Select the Award ID in the **Search Results** section.



 The Award Profile page displays. Scroll down the page and select the Project link in the Associated Project section.

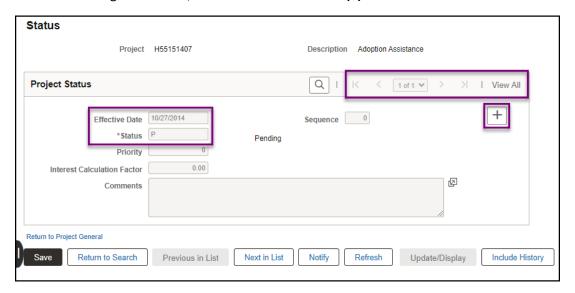


6. The Project General Information page displays showing the current Project Status. In this example, notice "Pending" in the Project Status field. To change the Status, select the hyperlink of the current Project Status.





- 7. The Status page displays, showing the current Status and the Effective Date when that Status was activated. Status changes are maintained in separate rows. This enables SWIFT to maintain a history of the Project Status.
- 8. To change the Status, select the Add New Row (+) icon.



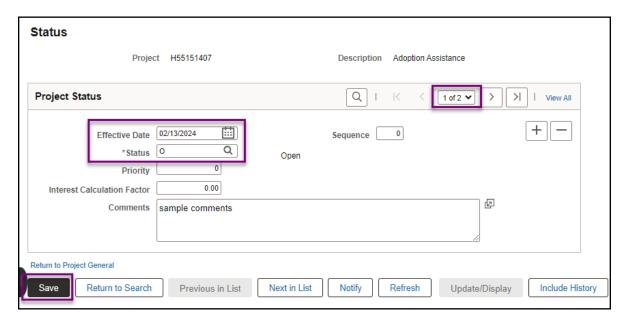
- 9. A new row is added. Notice that the new row is row 1 of 2 and the fields are now open to edit.
- 10. By default, the Effective Date is the current date. You can change the Effective Date to a future date for the status change.
- 11. Select the **Status Lookup** icon to select a new status. Status Codes are described below. In this example, we select "O Open" for the new status.

Status	Description
C - Closed	Process Status: Closed/Inactive. When a project is closed, it is not available for selection or processing.
O - Open	Process Status: Open/Active
P - Pending	WARNING! Don't Use. Projects start with a pending status but cannot be changed to this status.

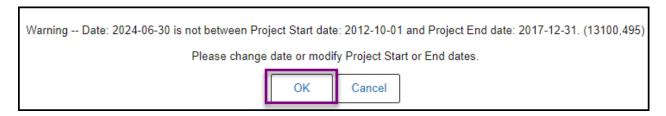


Status	Description
H - Hold	Process Status: Inactive. When a project is on hold, you cannot process transactions for the project.
X – Pending Close	Process Status: Active. This status allows General Ledger and Accounts Payable transactions only to be applied to the contract. Requisitions or Purchase Orders cannot be created for a project in Pending Close status. This does not prevent transactions from being processed in Billing and Accounts Receivable modules.
Z – Pending Close – GL Only	Process Status: Active. This status allows only General Ledger transactions to be applied to the project; this does not include payroll journals from SEMA4. Vouchers, purchase orders, and requisitions are also not allowed to be entered. This may be used for end-of-year adjustments to be made in the General Ledger or for the creation of GL journals from module transactions on the last day of the projects. This does not prevent transactions from being processed in the Billing and Accounts Receivable modules.

- 12. Optionally, enter a Comment.
- 13. Select the Save button.



14. If you entered a status with a date outside of the Project Start and End Date, you will receive a warning; however, you will be able to save the status.





15. Select the Return to Project General link to return to the **General Information** page of the Project. The project **General Information** page now reflects the new Project Status.

