

QUICK GUIDE CLOSEOUT



ALLOCATING CLOSE OUT QUESTIONS

1. Select the Close Out tab on the Contract and displayed will be any predefined closeout question groups

The screenshot shows the 'CONTRACT CLOSEOUT' tab selected in a navigation bar. Below, a section titled 'Contract closeout checklists (3)' displays three categories: Environmental, Finance, and Site Review. Each category shows 'NOT APPLICABLE' with details on the number of questions, completion date, and completion by.

2. Select the close out group and allocate a responsible person for completing this step and a scheduled date for this to be completed by.

The screenshot shows a form with two sections: 'Scheduled closeout date:' and 'Forecasted closeout date:'. Each section has a date field set to '30.07.2021' and a pencil icon for editing.

3. Press **Save**

STARTING CLOSE OUT WORKFLOW

1. When the Contract is ready to start the closeout press the play icon for the relevant sections. As they have users allocated, they should state **Not Started**.

The screenshot shows the 'Environmental' section with a 'NOT STARTED' status. It displays statistics: 'Number of questions: 3', 'Number of questions answered: 0', 'Completion date: N/A', and 'Completed by: N/A'. It also shows 'Scheduled closeout date: 30.07.2021' and 'Forecasted closeout date: 30.07.2021'.

2. The user will receive notification that there is a task for them to complete

The screenshot shows an email notification from InEight. It requests a review and completion of the Environmental checklist for project 100014 - Electrical Fitout. It provides the project details, scheduled closeout date (7/30/2021), and forecasted closeout date (7/30/2021). It includes a link to view the checklist and a note that it is a system-generated email.

COMPLETING CLOSE OUT QUESTIONS

1. On Receiving notification there is a Close Out section to complete follow the supplied link which will take you directly to the questions. Complete the answers as appropriate.

The screenshot shows a form for 'Details of Environmental Plan Breach'. It includes fields for 'Name', 'Any Breaches of Environmental Plan' (with a dropdown set to 'No'), and 'Site Left Clean' (with a dropdown set to 'Yes'). There is also a 'Notes' field with the text 'Good Contractor, great job!'.

2. On completion of answering the questions if no additional follow up is required to complete the action select **Save and mark as complete**

Save and mark as complete

CONTRACT CLOSE

1. Verify that all Close out questions are complete, all invoices paid, Vendor Change Orders completed or closed.
2. On to the Header tab for the contract and change the status to **Closed**. This is only available if fully completed.

The screenshot shows the 'Contract status' dropdown menu. The status is currently 'Draft'. The menu lists various statuses: Draft, In review, Out for vendor signature, Out for internal signature, Executed, Terminated, Cancelled, and Closed. The 'Closed' status is highlighted at the bottom.