

How to Mark a Site as Closed

TI version 10.7

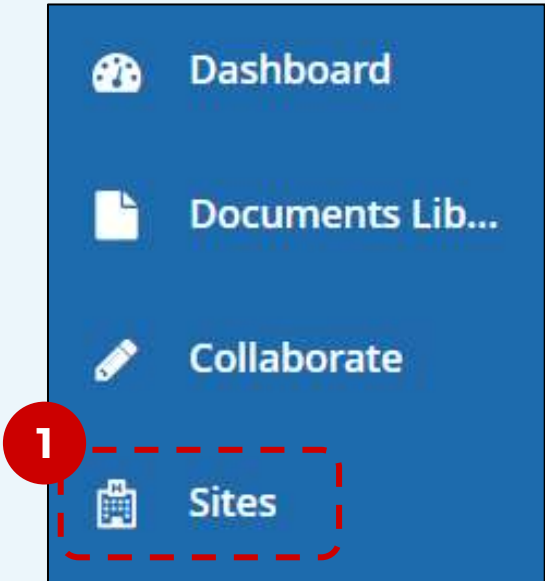
APPLICABLE TO:

- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ eTMF
- ☒ Collaborate
- ☒ eISF



This Job Aid covers a process that may look slightly difference from a room to another due to different product offering and customization properties.

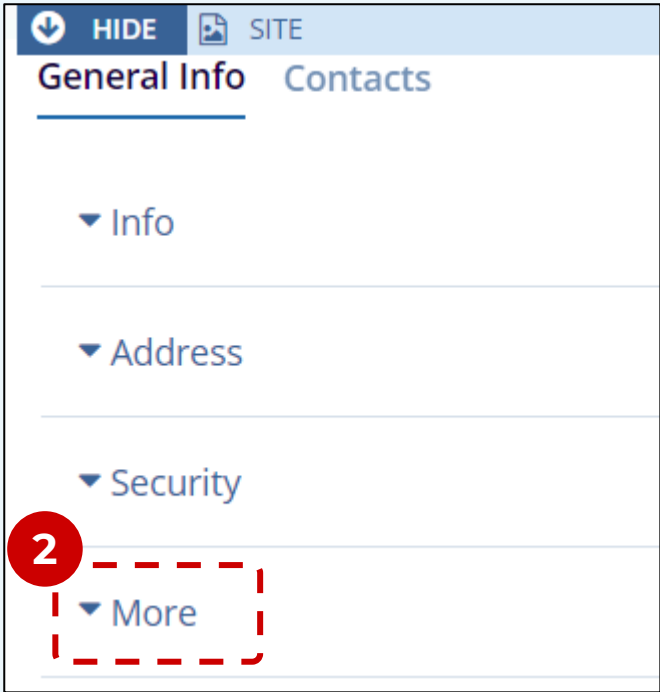
1 Using the navigation column, enter the **Sites** area.



2 Select **one** Site.

1 - 2 of 2 (1 selected)			
<input type="checkbox"/>		Institutio...	Site Status
<input type="checkbox"/>	...	Toronto H...	ACTIVE
<input checked="" type="checkbox"/>	...	Woodridg...	ACTIVE

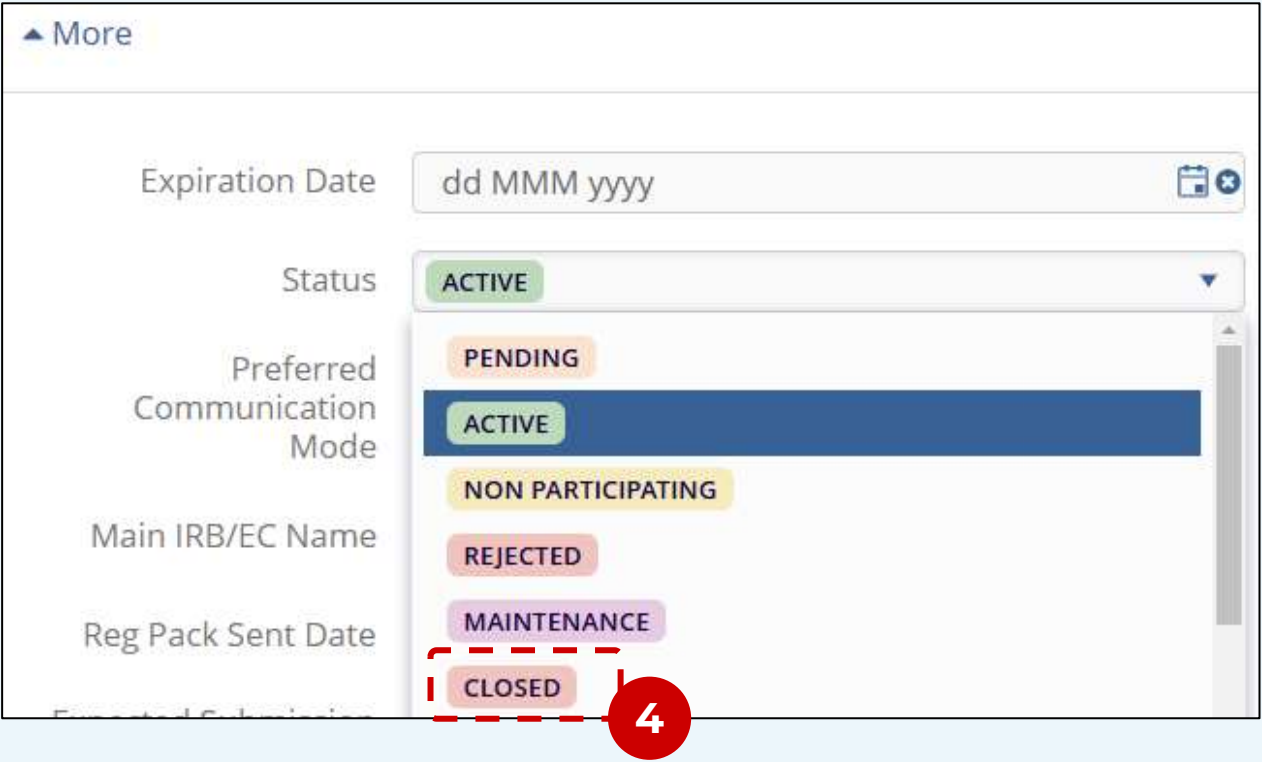
3 Expand the Site pane at the bottom of your screen.
Scroll to and click on the **More** section.



4 Extend the Status dropdown, and select **Closed**.



If this dropdown is not selectable, the room is likely integrated with offerings that auto-manage site statuses (like CTMS or SSU).



The screenshot shows the 'More' dropdown menu with the 'Status' dropdown extended. The 'Status' dropdown is currently set to 'ACTIVE'. The extended list shows the following options: 'PENDING', 'ACTIVE', 'NON PARTICIPATING', 'REJECTED', 'MAINTENANCE', and 'CLOSED'. The 'CLOSED' option is highlighted with a red dashed box and a red circle with the number 4.

5 Scroll to and enter the **Effective Closure Date**.



The screenshot shows the 'Effective Closure Date' field. The field is currently empty, and a red dashed box with a red circle containing the number 5 highlights the field.

6 Save your changes. Button is located at bottom of the Site pane.



The screenshot shows the 'Save' and 'Save & Next' buttons. The 'Save' button is highlighted with a red dashed box and a red circle containing the number 6.

7 The site is now listed in the **Closed** category.



The screenshot shows a list of site categories: 'All', 'Active 19', and 'Closed 1'. The 'Closed 1' category is highlighted with a red dashed box and a red circle containing the number 7.