



Clarity Scope Management

Objective

Scope Management – Documents the project (AQCRDE) Assumptions, Questions, Comments, Requirements, Deliverables, and Exclusions as determined throughout the project lifecycle

Contents

Clarity Access 2

Scope Management 2

AQCRDE Definitions 3

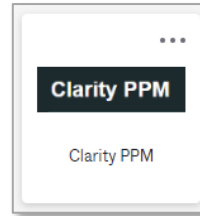
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Clarity Access

[Return to top of document](#)

1. Access Clarity through Okta
<https://discounttire.okta.com/app/UserHome?fromLogin=true>
 - a. Username: 6-digit Employee number
 - b. Password: Windows Active Directory Password
 - c. Select Clarity PPM



Note: If you don't have credentials, send an email to Support (support@discounttire.com) to create an Incident ticket for the password to be provided, or in Service Now enter in a General Request requesting access

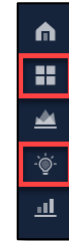
Scope Management

[Return to top of document](#)

The Scope Management module is available in Projects and Ideas

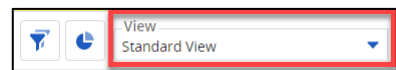
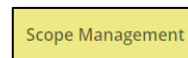
Its purpose is to assist with tracking Assumptions, Questions, Comments, Requirements, Deliverables, Exclusions (AQRDE) that come up during Intake and at any point during the Project

Scope Management It is for use throughout the project. For example, requirements and out of scope items are often identified during Study and early in the Research stages and should be captured in the module



Any AQRDE collected during Intake are imported into the Idea and will carry through when converted to a Project, so the Project Manager (PM) has everything that was raised during Intake. The PM is expected to review and, as appropriate, actively manage any items that would still be considered open, and anything identified after Intake.

- 1) Enter the Scope Management module
- 2) Utilize the Standard View
- 3) Select the Add Row blue + icon to create an entry
- 4) Document any identified Assumptions, Questions, Comments, Requirements, Deliverables, Exclusions (AQRDE)






Note: Refer to Definitions at the bottom of the document

- 5) Include all mandatory (*) and relevant data about the item

Field Name	Description	Valid Values
Category *	The type of information	Assumption, Comment, Deliverable, Exclusion, Question, Requirement
Topic	The management area to which it is related	Cost, Estimates, Other, Quality, Resources, Risks, Schedule, Scope
Name*	The actual piece of information	Free form

Date Submitted	The date the item was raised (Populated as part of the intake process for anything captured then. Manual after that)	Date
Submitted By	The person that raised the item. (Populated as part of the intake process for anything captured then. Manual after that)	Select submitter's name

Assignments Financial Plans Project Transaction Entry To Dos Risks Issues Changes Key Decisions Status Report Detailed Status Report 4 Block Status Report Links Values Capabilities Audit Scope Ma											
<div>  <div> <input type="text" value="Search..."/>   </div> <div> View Standard View </div> <div>Save</div> </div>											
Select All Deselect All											
Group By											
<input type="checkbox"/> Requirements	Quality	Requirements	9/1/23	Scott, Steve	9/20/23	On Hold	9/15/23	Scott, Steve	Enter pertinent notes here	11/6/23	SMK
<input type="checkbox"/> Question	Schedule	Question	9/1/23	Scott, Steve	9/20/23	New	9/14/23	Scott, Steve	Enter pertinent notes here	11/6/23	SMK
<input type="checkbox"/> Exclusion	Scope	NOT Expected (Out of Scope) Project Outcome	5/11/23	Wiese, Debbie	5/18/23	New	5/18/23	Scott, Steve	Cannot be measured	5/20/23	SMK
<input type="checkbox"/> Exclusion	Scope	Exclusion	9/1/23	Scott, Steve	9/20/23	In Progress	9/13/23	Scott, Steve	Enter pertinent notes here	11/6/23	SMK
<input type="checkbox"/> Deliverable	Scope	Deliverable	9/1/23	Scott, Steve	9/20/23	Done	9/12/23	Scott, Steve	Enter pertinent notes here	11/6/23	SMK
<input type="checkbox"/> Comment	Resources	Comment	9/1/23	Scott, Steve	9/20/23	Closed	9/5/23	Scott, Steve	Enter pertinent notes here	11/6/23	SMK
<input type="checkbox"/> Assumption	Cost	Assumption	9/1/23	Scott, Steve	9/20/23	Blocked	9/4/23	Scott, Steve	Enter pertinent notes here	11/6/23	SMK

6) Monitor and maintain all the other pertinent details and status of the items throughout the project

Field Name	Description	Valid Values
Resolution Due Date	The date by which the item is to be addressed. Completely manually maintained	Date
Status	The status of the item. Manually maintained	Blocked, Closed, Done, In Progress, New, On Hold
Next Check Date	The date on which the next follow-up is to occur. Manually maintained	Date
Assigned To	The person with current ownership of the time	Select assignee's name
Notes	For tracking pertinent update information	Free form Recommend putting the latest update at the top and prefacing each with the date and initials of the person that provided it.
Date Resolved	The date on which the item was fully addressed	Date

AQCRDE Definitions

[Return to top of document](#)

Assumptions	Any consideration that is taken to be true at any point during the project. These are typically things that impact required scope, skillsets, costs.
Question	A sentence or comment so as to elicit information about the project
Comment	Verbal or written remark expression an opinion or reaction on the topic
Requirements	Scope item that is needed or wanted for the project; functional or non-functional
Deliverable	Specific outputs / quantifiable goods or services that must be provided upon the completion of the project
Exclusion	Cannot do after the project