Project
Close / Cancel / On-Hold
Process

Objective

This instructional document describes the processes and tasks to Close, Cancel or place a project On-Hold

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Provided by: PMO
Designed by: PMO – smscott

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Close Activities

1) **Continue to provide Status Reports (Bi-Weekly Project Status; Weekly Portfolio Update);** Utilize the Status Report module in Clarity

   Documentation Link: Communication - INSTRUCTIONS - Project Status Report

2) **Complete Operations handover/transition** (typically this is executed during previous stages, although a reminder to transition to operations prior to closing the project)

   Documentation Link: Operational Readiness - Service & Ops Support Teams

3) **Facilitate a Lessons Learned session, document and distribute results, complete any follow-up as necessary**

   Documentation Link: Lessons Learned (presentation)Lessons Learned (spreadsheet)

Status Report

Transition Activities

♦ **Support resources in place**

♦ **Training executed and follow up ad-hoc sessions on calendars**

♦ **New headcount request in process with leadership**

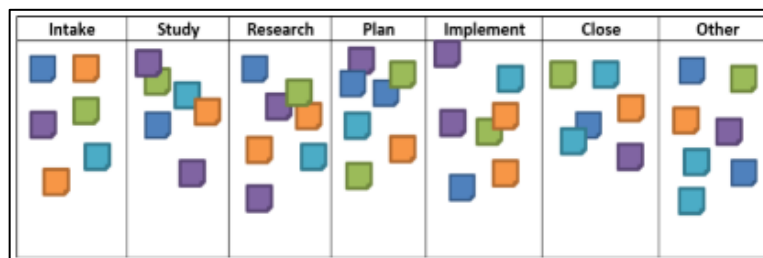♦ **Benefit Review meetings scheduled**

♦ **New Metrics tracking in progress**

4) **Celebrate, provide Team Recognition**

Note - Amidst the excitement and sense of accomplishment, it is important of maintaining financial responsibility during our project completion celebrations. It is crucial that we keep our spending in check and adhere to our budgets. By doing so, we ensure the long term sustainability of our organization and demonstrate our commitment to responsible financial management

1. Set a Realistic Budget; Let us establish a reasonable budget for the celebration events. Consider the scale of our achievements.
2. Prioritize Value: Focus on creating meaningful experiences rather than excessive spending. Look for cost-effective alternatives that still allow us to commemorate our achievements and foster team camaraderie.
3. Avoid Unnecessary Expenditures: Keep a close eye on non-essential expenses. Evaluate the necessity of every purchase and seek cost-effective solutions whenever possible
4. Engage in Discussions: Encourage open conversations about budgetary concerns within the team. Share ideas and suggestions for cost-effective celebration options.

5) **Archive and close project records**

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Close Activities

a) All project deliverables are in the document repository
b) Final versions of deliverables are readily identifiable
c) Operational materials copied to their proper repository home

6) **Assignments;** Utilize the Assignments module in Clarity and the Default Assignment View
   a) *Note: Resource must be assigned to a Task*
   b) Update all Estimated Time to Complete (ETC's) to zero

7) **Risks;** Utilize the Risks module in Clarity and the Default Risk View
   a) Ensure all data is accurate and current
   b) Update Status to Closed/Resolved

8) **Issues;** Utilize the Risks module in Clarity and the Default Risk View
   a) Ensure all data is accurate and current

Close Activities

b) Update Status to Closed/Resolved

9) **Changes;** Utilize the Changes module in Clarity and the DT Changes View

   a) Ensure all data is accurate and current
   b) Update Status to Closed/Resolved

10) **Key Decisions;** Utilize the Key Decisions module in Clarity and the DT KDs View

    a) Ensure all data is accurate and current

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b) Update Status to Closed/Resolved

11) **Status Report (Detailed Status Report);** Utilize the Detailed Status Report module in Clarity

Detailed Status Report

a) Create, distribute Final Reporting: Status Report (Explicitly report 'Final' Report in distributing email)

Documentation Link: Communication - INSTRUCTIONS - Project Status Report

12) **Move all project documentation in SharePoint to completed projects**
Note: Prerequisite is project links are created from the start of a project to the project repository (Teams/SharePoint)

a) Open the IT Document Library on the Discount Tire Information Technology SharePoint Site

b) Select Information Technology

c) Select IT Document Library

d) Select Projects, then Projects folders

e) Move project link to the Closed Projects folder

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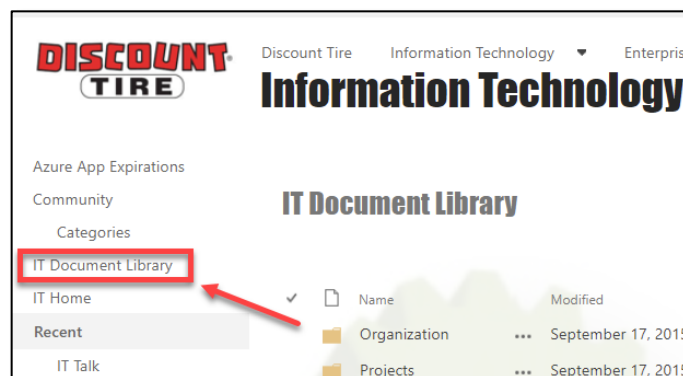
Close Activities

Note: If using Teams/SharePoint repository, ensure all documentation is up to date and finalized. Create a Closed folder to store documents.
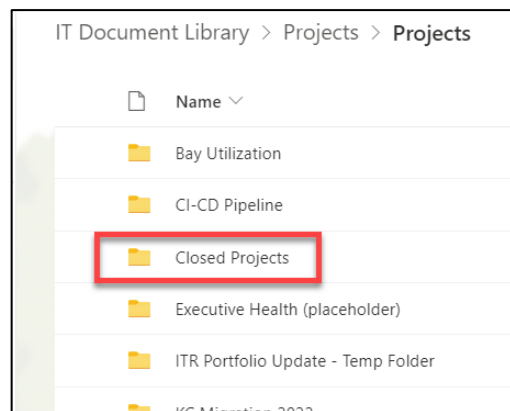
1) **Update the Stage Gate Deliverables – Scaling** checklist sheet and all the documents needed depending on your rigor score with links/attachments

Documentation Link: Control – Stage Gate Deliverables – Rigor and Scaling

2) **Follow-up once final timesheets to posted**
   a) Put a reminder in your calendar for about 10 days after the Close Stage Finish Date to complete the following steps:
      i) **Tasks – on the remaining that needed to stay open**
         (1) Set Status to Completed

         (2) Set % Complete to 100%

         (3) Update Finish Date as appropriate

         (4) Select Open for Time Entry to No

      ii) **Staff – for those that were still reporting time**

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  (1) Set Open for Time Entry to No (uncheck)

 iii) **Status Report - create a "closed" record;** Utilize the Status Report module and the Default Status Report View

  (1) Set Name [actual Close Stage Finish Date] to Closed

  (2) Enter 'Project Closed' on the Portfolio

  (3) Click the Update Properties checkbox

 iv) **Properties**

  (1) Confirm Project/Portfolio Status in Status section set to Project Closed

  (2) Set Stage to DT Standard/Completed

3) **Complete Financial Closure**

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Close Activities

a) Utilize the Project Transaction Entry module to enter in the project expenses

Project Transaction Entry

   i) Ensure expenses for celebration are posted to the project
   ii) All expected invoices received and entered into Clarity and financial validation of legitimate project costs

b) All time tracking team members have submitted all past time sheets

c) Run a final Financial Report in Clarity following these steps. *Note: This Project Financials report is also represented on the fourth page of the Detailed Status Report*

   i) Select the Menu Links module

   Reports and Jobs

   ii) Select Reports and Jobs
   iii) Choose the DT- Financial Forecast Review by Plan Grouping report

   DT - Financial Forecast Review by Plan Grouping

   iv) Select the following Parameters
   (1) Investment Type – All

   INVESTMENT TYPE
   All

   (2) Investment – Search for the project

   INVESTMENT
   Methodology Training Project Plan

   (3) Fiscal Year(s) for the project

   (4) Report Currency – USD

   FISCAL YEAR
   FY2023

   (5) Financial Plan Group By 1 – Cost Type

   (6) Financial Plan Group by 2 – Transaction Class

   REPORT CURRENCY
   USD
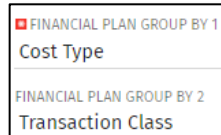
   Note: All other parameters, no selection is necessary

   v) Save Parameters
   (1) Saved Parameters Name

Close Activities

(2) Save and Return

> ☐ FINANCIAL PLAN GROUP BY 1
> Cost Type
>
> FINANCIAL PLAN GROUP BY 2
> Transaction Class
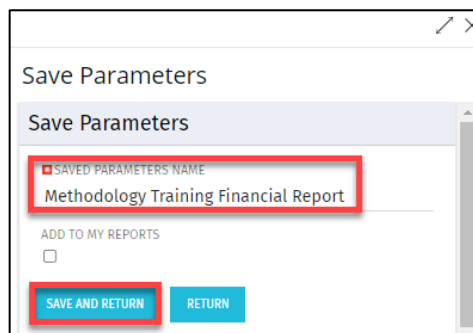
(3) Select Submit to run the .pdf report

> SAVE PARAMETERS

Note: The Saved report will be in the list of reports to select from, so the user does not need to re-enter all the parameters for future running of the report

> Save Parameters
>
> Save Parameters
>
> ☐ SAVED PARAMETERS NAME
> Methodology Training Financial Report
>
> ADD TO MY REPORTS
> ☐
>
> SAVE AND RETURN   RETURN

vi) Save the .pdf report in your project repository

> SUBMIT   RETURN

> ☐ DT - Financial Forecast Review by Plan Grouping
> ☐ ↳ 2012 Operating System Uplift – Financial Forecast v2
> ☐ ↳ IT: IT Readiness: Win2008/SQL2008 Migration & Uplift (v2)
> ☐ ↳ Methodology Training Financial Report
> ☐ ↳ O365/WIN10 Corp/Regional Deploy
> ☐ ↳ Treadwell Modernization – DT Financial Forecast – v6.21.21
> ☐ ↳ Zero Touch Patching Financial Forecast
> ☐ DT Actuals by Work Type

d) SAP Final IO/SO validation; Confirm all invoices posted to Clarity following the instructions documented in the Project Cost Management folder for the PM Methdology
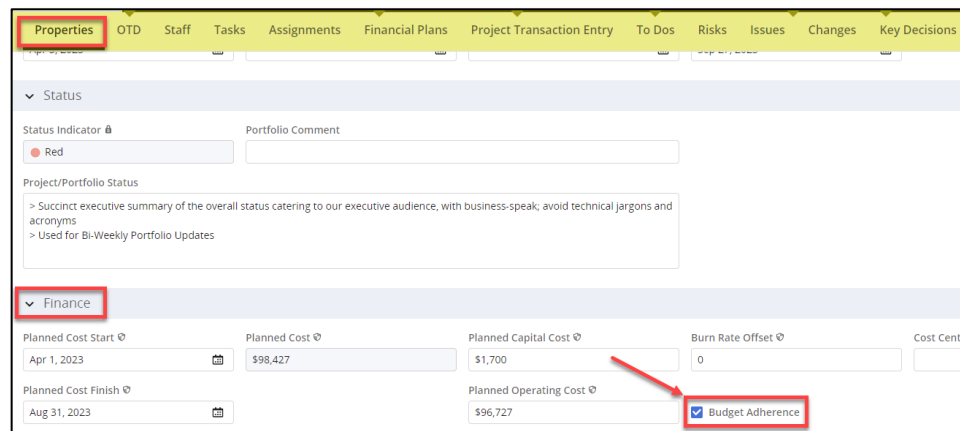
Documentation Link: Project Cost Management

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Close Activities

e) Conduct a final review with IT Finance for sign-off; upon approval, select the Budget Adherence checkbox, in the Financial Section on the Properties module

   Note: Checked if +/- 10%, uncheck if not

f) Email to ACCTG@discounttire.com to request project Internal Order (IO) and Statistical Order (SO) to be closed in SAP
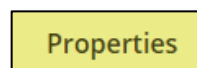
4) **Ensure Resource Managers initiate Workday termination of all contractors being rolled off (Staff Aug and Fixed bid)**; This should trigger removal of system access and VPN Accounts

5) **Final quality check from your Delivery Manager**

6) **Complete Clarity Close Tasks**
   a) **Properties;** Utilize the Properties module in Clarity
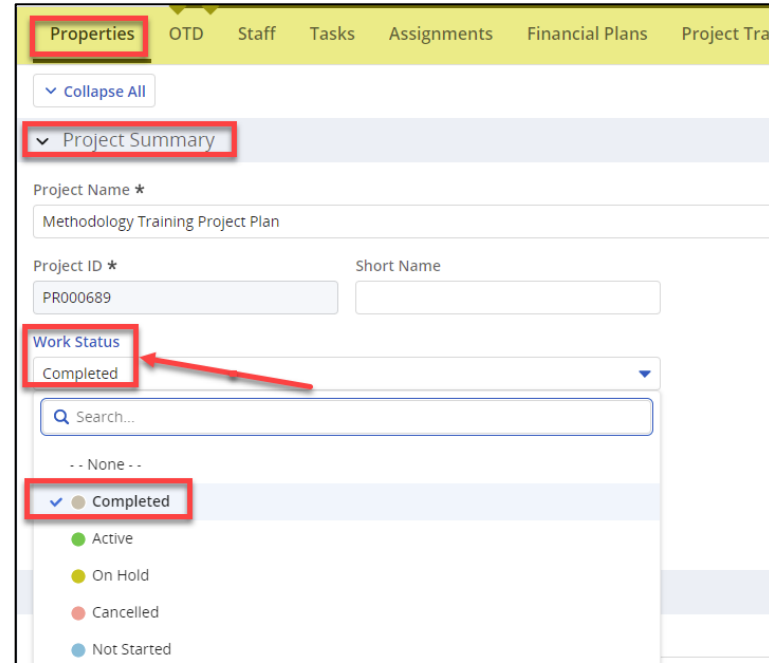
Close Activities

    i)   Set Work Status to Completed

Close Activities

ii) Update % Planned to 100%

iii) Update % Complete to 100%

iv) Set Stage to DT Standard/Completed

v) Update the Finish Date to Close date

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Close Activities

    vi) Uncheck Open for Time Entry

b) **On Time Delivery (OTD)**

    i) Update and ensure On Time Delivery (OTD) in Clarity (CA PPM) is correct; Utilize the OTD module in Clarity

    Documentation Link: PMO - Control - QRG - Clarity (CA PPM) - On Time Delivery

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Close Activities

c) **Staff - Close out the Staff (Resource) information;** Utilize the Staff module in Clarity and the Default Staff View
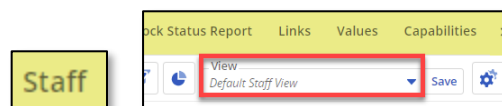
i) Ensure there are no unstaffed demand entries; Examples of unstaffed demand roles (Network Engineer, Quality Management)

ii) If already rolled off: Confirm all resources no longer reporting time have an appropriate Finish Date (no longer than project end date)
   (1) Enter the appropriate Finish Date
   (2) Ensure Open for Time Entry is No

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Close Activities

iii) Make sure resources have no current/future allocations

iv) Set Open for Time Entry to 'No'
v) Uncheck Open for Time Entry on either on the View or on the Details panel on the right of the screen

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Close Activities

vi) If resources to report/post additional time to the project and still doing project activities
   (1) Ensure Finish Date = Project Close Date
   (2) Confirm allocations
   (3) Open for Time Entry = Yes (so they can still report time)

d) **Tasks - Close out the Tasks details;** For all tasks except those needed to capture Close activity time. Utilize the Tasks module in Clarity and the Default Task Grid View Timeline

   i) Set all task's status to Completed

   ii) Confirm Start/Finish Date set appropriately

   iii) Set % Complete = 100% for all tasks

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Close Activities

    iv)   Set Open for Time Entry to No

7) **Send email to PPMAdmin**
   a) Subject: [Project] Close Activities Complete
   b) Body: "All PM closure activities are complete for [project]. Please complete administrative closure steps."
   c) The admins will:
      i) Change Work Status to Completed
      ii) Close for Time Entry
      iii) Close for Financials

Cancel Activities

1) **Project Executive sends notice of cancellation**
   a) To: CIO, CTO
   b) CC: Business Owner, Technology Owner, Delivery Manager, Project Manager (if assigned), DTC_IT_Planning, any other key interested players
   c) Subject: "[Project Name] Cancelled"
   d) Body: "[Project Name] is being cancelled [for what reason]."

The following will be done by:
   d) PM or DM if it is already a "Project"
   e) IT Planning team if it is still an Idea

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Cancel Activities

2) **Assignments;** Utilize the Assignments module in Clarity and the Default Assignment View
   a) *Note: Resource must be assigned to a Task*
   b) Update all Estimated Time to Complete (ETC's) to zero

3) **Staff**

   a) For any Staff records with Zero (0) Actuals, delete the entire record
      i) Utilize the Staff module in Clarity

      ii) Select Columns tab on the far right section of the view

      iii) If not shown already, Add Actuals to your view either by selecting Actuals or Totals > Actuals that willl display in the Totals section of the view

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Cancel Activities

iv) Check the Resource with Zero (0) Actuals and select Delete
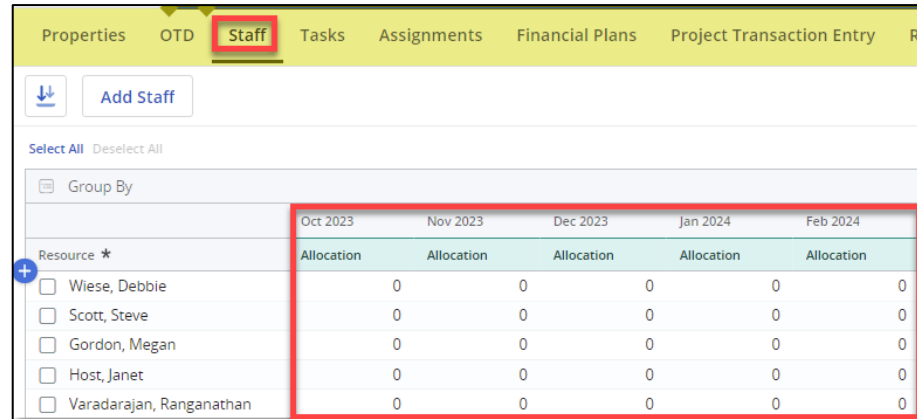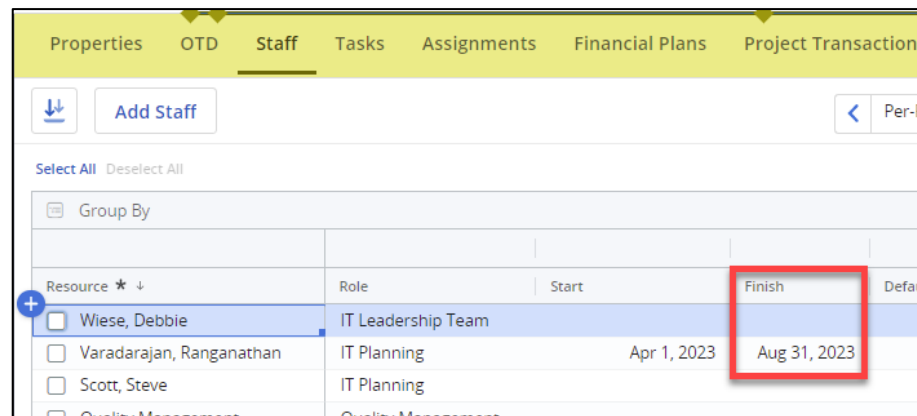
b) For any Staff with Actuals > 0

i) Clear all future allocations

ii) Set Finish date to date of the email

Cancel Activities

iii) Set Open for Time Entry = N

4) **Tasks**

a) For in-flight Tasks, Utilize the Tasks module

i) Status = Completed
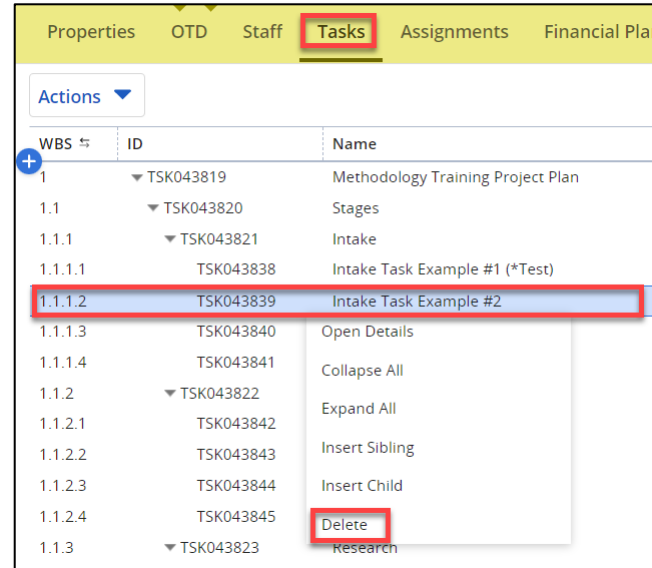ii) % Complete = 100%
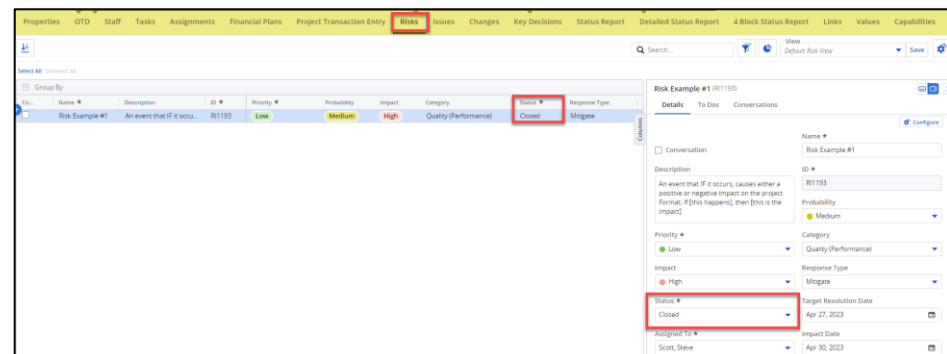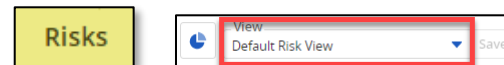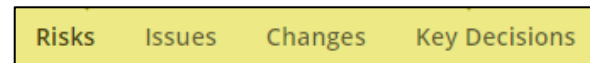iii) Start & Finish Date set appropriately

iv) Open for Time Entry = No

Cancel Activities

b) **Tasks not started -** unless there is a desire to keep the schedule for future reference, delete them. If want to keep, follow steps for in-flight tasks
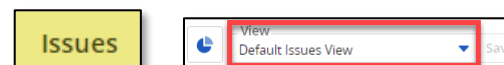   i) Right click on task, select Delete

5) Close out any RAID items; Utilize the applicable module

a) **Risks;** Utilize the Risks module in Clarity and the Default Risk View

   i) Ensure all data is accurate and current
   ii) Update Status to Closed/Resolved

b) **Issues;** Utilize the Risks module in Clarity and the Default Risk View

   i) Ensure all data is accurate and current

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Cancel Activities

    ii) Update Status to Closed/Resolved

  c) **Changes;** Utilize the Changes module in Clarity and the DT Changes View

    i) Ensure all data is accurate and current
    ii) Update Status to Closed/Resolved

  d) **Key Decisions;** Utilize the Key Decisions module in Clarity and the DT KDs View

    i) Ensure all data is accurate and current

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Cancel Activities

    ii)   Update Status to Closed/Resolved

6) **Status Report - create a "cancelled" record.**
      i)   Name: "[date of email] – Cancelled"
      ii)   Portfolio Update = "Cancelled"
      iii)   Click the Update Properties checkbox

Documentation Link: Communication - INSTRUCTIONS - Project Status Report

Cancel Activities

7) **Properties:**
   a) Confirm Project/Portfolio Status in the Project Summary section = Cancelled
   b) Set work Status = Cancelled
   c) Set Stage = Completed
   d) Set Committed Stage Finish Date to the Cancelled date

   e) Update the Finish date, on the Schedule section to the date that the project was confirmed cancelled.

   Note: Tasks dates must be updated prior to changing the Finish date, as the date will default to the last date on the Tasks schedule.

8) **If 2-7 completed by the DM or PM, forward the Project Executive's cancellation notice to PPMAdmin with the following in the body:**

"All PM activities are complete for the cancellation of [project]. Please complete administrative cancellation steps."
   a) **The PPM Admins will:**
      i) Change Work Status to Completed
      ii) Changed [Investment] Status to Cancelled
      iii) Close for Time Entry
      iv) Close for Financials

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On-Hold Activities

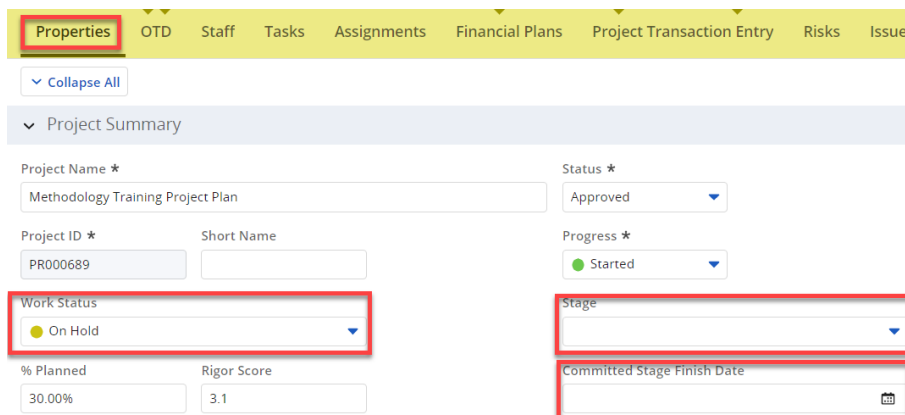1) **Project Executive send notice of project being put On-Hold**
   a) To: CIO, CTO
   b) CC: Business Owner, Technology Owner, Delivery Manager, Project Manager (if assigned), DTC_IT_Planning, any other key interested players
   c) Subject: "[Project Name] On-Hold"
   d) Body: "[Project Name] is being placed On-Hold [for what reason]."

The following Clarity activities will be done by:
   a) PM or DM if it is already a "Project"
   b) IT Planning team if it is still an "Idea"

2) **Properties**

   a) Set Status to On-Hold

   b) Clear Committed Stage Finish Date

   c) Clear Target Go-Live Date in the Schedule section of Properties

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On-Hold Activities

    d) Clear Committed Go-Live Date in the Schedule section of Properties

3) **OTD** – Clear any future Committed Dates

4) **Assignments;** Utilize the Assignments module in Clarity and the Default Assignment View
    a) ***Note:** Resource must be assigned to a Task*
    b) Update all Estimated Time to Complete (ETC's) to zero

5) **Tasks not started**
    a) Ensure any tasks have their Start and Finish dates shifted appropriately

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On-Hold Activities

b) Ensure all tasks have Open for Time Entry = No

6) **Create a Key Decision** record documenting why it was put On-Hold and explaining the reason for the selected target start date

7) **If Project activities have NOT started:**

a) **Properties**
   i) Shift Start date to projected new date

   ii) Shift Finish date accordingly

b) **Staff**

   i) Select all Staff for mass edit and Set Start Date to the project's projected Start date

   ii) Validate all allocations have shifted accordingly

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On-Hold Activities

8) **If Project activities HAD started**

a) **Properties** – Shift Finish date to new projected date based upon the project resumption date in the Schedule section

   NOTE: *Once time has been reported to a Project its Start date cannot be changed*

b) **Staff**

   i) For those with 0 actuals, use mass edit to set their Start and Finish dates to the new projected dates

   ii) For anyone with actuals > 0, manually move their monthly allocations out so they are 0 during the On-Hold months

c) **In flight Tasks**

   i) % Complete = Keep current percentage
   ii) Finish Date set appropriately to new estimated completion date

   iii) Open for Time Entry = No

On-Hold Activities

9) **Status Report - create a "On-Hold" record**
   a) Name: "[date of email] – On-Hold"
   b) Portfolio Update = "Project On-Hold"
   c) Click the Update Properties option

   Documentation Link: Communication - INSTRUCTIONS - Project Status Report
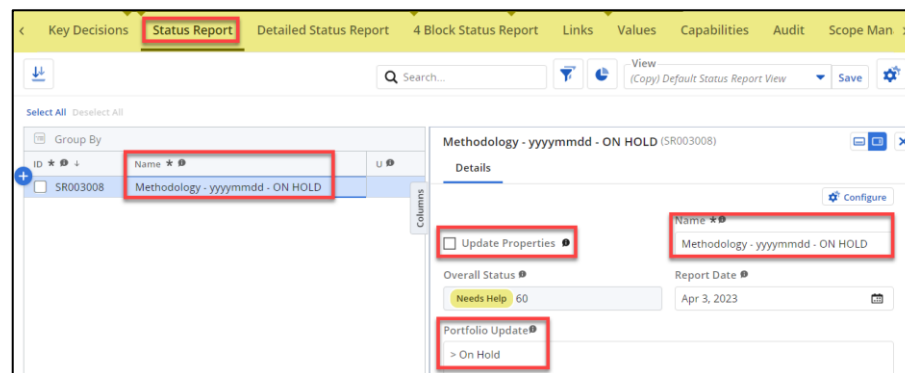
10) **If 2-9 completed by the DM or PM, Forward the Project Executive's cancellation notice to PPMAdmin with the following in the body:**

    "All PM activities are complete for the On-Hold of [project]. Please complete administrative On-Hold steps."
    a) **The PPM Admins will:**
       i) Change Work Status to On-Hold
       ii) Changed [Investment] Status to On-Hold
       iii) Close for Time Entry
       iv) Set Financial Status to Hold

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