



# 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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## Close Activities

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

Status Report

**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 \(spreadsheet\)](#)

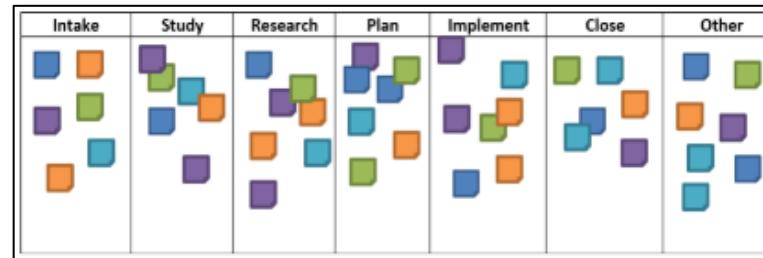
- 4) Celebrate, provide Team Recognition

**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

- 5) Archive and close project records

## 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



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.

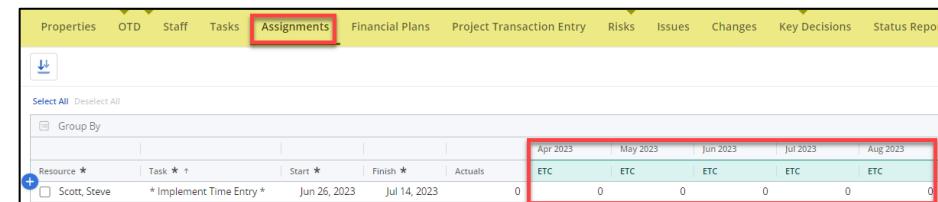
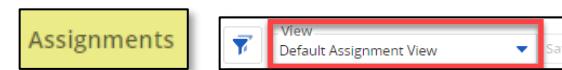
## Close Activities

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- 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

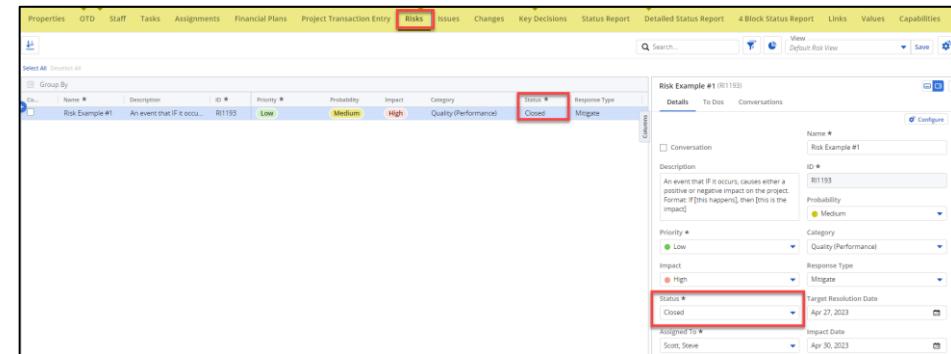
6) **Assignments;** Utilize the Assignments module in Clarity and the Default Assignment View

- a) **Note:** Resource must be assigned to a Task
- b) Update all Estimated Time to Complete (ETC's) to zero



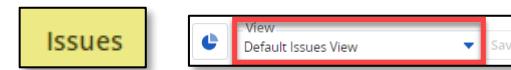
7) **Risks;** Utilize the Risks module in Clarity and the Default Risk View

- 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

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b) Update Status to Closed/Resolved

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues **Changes** Key Decisions Status Report Detailed Status Report 4 Block Status Report Links Values Capabilities

Search... View Default Issues View Save

Issue Example #1 (IS000724)

Issue Example #1 (IS000724)

Details To Dos Conversations

Name: Issue Example #1

Priority: Medium

Status: **Resolved**

Category: Schedule

Assigned To: Scott, Steve

Target Resolution Date: May 3, 2023

Impact Date: May 19, 2023

Last Updated Date: Jul 26, 2023

Description: An event that has occurred during a project that has an impact on at least one objective or measure of the project. (Check include in Status Reporting to display)

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

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues **Changes** Key Decisions Status Report Detailed Status Report 4 Block Status Report Links Values Capabilities

Search... View Default Changes View Save

Changes Example #1 (CR000233)

Changes Example #1 (CR000233)

Details To Dos Conversations

ID: CR000233

Created Date: Apr 3, 2023

Name: Changes Example #1

Status: **Closed**

Priority: Medium

Category: Cost

Assigned To: Scott, Steve

Last Update: Jul 26, 2023

Expected Closure Date: May 5, 2023

Description: Activity that alters the approved Cost Schedule Performance (CSP)

Review Date: Apr 5, 2023

Expected Closure Date: May 5, 2023

Include in Status Reporting:

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

a) Ensure all data is accurate and current

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues **Changes** Key Decisions Status Report Detailed Status Report 4 Block Status Report Links Values Capabilities

Search... View Default KDs View Save

Key Decisions Example #1 (KD0001)

Key Decisions Example #1 (KD0001)

Details To Dos Conversations

ID: KD0001

Created Date: Apr 3, 2023

Name: Key Decisions Example #1

Status: **Closed**

Priority: Medium

Category: Cost

Assigned To: Scott, Steve

Last Update: Jul 26, 2023

Expected Closure Date: May 5, 2023

Description: A decision that impacts the project's direction or outcome.

Review Date: Apr 5, 2023

Expected Closure Date: May 5, 2023

Include in Status Reporting:

## Close Activities

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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**

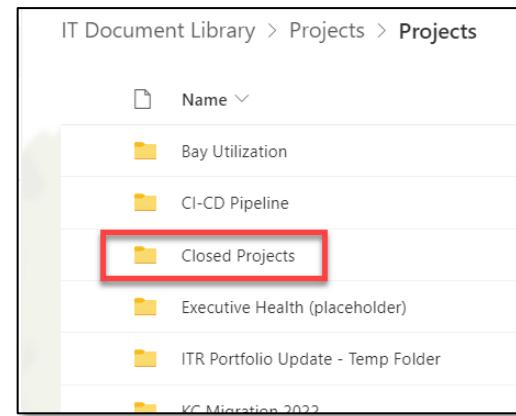
**Note:** Prerequisite is project links are created from the start of a project to the project repository (Teams/SharePoint)

- Open the IT Document Library on the [Discount Tire Information Technology SharePoint Site](#)
- Select Information Technology
- Select [IT Document Library](#)
- Select Projects, then Projects folders
- Move project link to the Closed Projects folder

## Close Activities

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**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

WBS	Name	Start	Finish	Status	% Complete	Open for Time Entry
1	Methodology Training Project Plan	Apr 1, 2023	Aug 31, 2023	Comple...	100%	
1.1	Stages	Apr 1, 2023	Aug 4, 2023	Comple...	100%	
1.1.1	Intake	Apr 3, 2023	Apr 21, 2023	Comple...	100%	
1.1.1.1	Intake Task Example #1 (*Test)	Apr 3, 2023	Apr 7, 2023	Comple...	100%	
1.1.1.2	Intake Task Example #2	Apr 10, 2023	Apr 14, 2023	Comple...	100%	
1.1.1.3	Intake Task Example #3	Apr 17, 2023	Apr 21, 2023	Comple...	100%	

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

## Close Activities

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- (1) Set Open for Time Entry to No (uncheck)
- ii) **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

Resource *	Role	Open for Time Entry
<input type="checkbox"/> Wiese, Debbie	IT Leadership Team	<input checked="" type="checkbox"/>
<input type="checkbox"/> Varadarajan, Ranganathan	IT Planning	<input type="checkbox"/>
<input type="checkbox"/> Scott, Steve	IT Planning	<input type="checkbox"/>

**Status Report**

View: Default Status Report View

**Status Report**

Methodology - yyyyymmdd - CLOSED (SR003008)

Update Properties

Overall Status: Needs Help 60

Report Date: Apr 3, 2023

Portfolio Update: > Project Closed

**Properties**

**Project Summary**

Project Name: Methodology Training Project Plan

Project ID: PRO00689

Work Status: Active

% Planned: 30.00%

% Complete: 27.00%

Status: Approved

Progress: Started

Stage: DT Standard/Completed

DT Standard/Completed is selected in the dropdown menu.

## Close Activities

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

Project Transaction Entry



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



Reports and Jobs

DT - Financial Forecast Review by Plan Grouping

INVESTMENT TYPE

All

INVESTMENT

Methodology Training Project Plan

FISCAL YEAR

FY2023

REPORT CURRENCY

USD

- iv) Select the following Parameters
  - (1) Investment Type – All
  - (2) Investment – Search for the project
  - (3) Fiscal Year(s) for the project
  - (4) Report Currency – USD
  - (5) Financial Plan Group By 1 – Cost Type
  - (6) Financial Plan Group by 2 – Transaction Class

**Note:** All other parameters, no selection is necessary

- v) Save Parameters
  - (1) Saved Parameters Name

## Close Activities

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(2) Save and Return

FINANCIAL PLAN GROUP BY 1  
Cost Type

FINANCIAL PLAN GROUP BY 2  
Transaction Class

**SAVE PARAMETERS**

Save Parameters

Save Parameters

SAVED PARAMETERS NAME  
Methodology Training Financial Report

ADD TO MY REPORTS

**SAVE AND RETURN** **RETURN**

**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

vi) Save the .pdf report in your project repository

**SUBMIT** **RETURN**

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

**Documentation Link:** [Project Cost Management](#)

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 Methodology

## Close Activities

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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

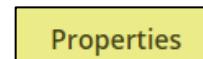
f) Email to [ACCTG@discounttire.com](mailto:ACCTG@discounttire.com) to request project Internal Order (IO) and Statistical Order (SO) to be closed in SAP

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

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- Set Work Status to Completed

Properties

OTD Staff Tasks Assignments Financial Plans Project Trans

▼ Collapse All

▼ Project Summary

Project Name \* Methodology Training Project Plan

Project ID \* PR000689 Short Name

Work Status

Completed

Search...  
-- None --

Completed

Active

On Hold

Cancelled

Not Started

## Close Activities

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- ii) Update % Planned to 100%
- iii) Update % Complete to 100%

Properties

Project Name \*

Methodology Training Project Plan

Project ID \*

PR000689

Short Name

Work Status

Active

% Planned

100.00%

Rigor Score

3.1

% Complete

100.00%

- iv) Set Stage to DT Standard/Completed

Properties

Project Name \*

Methodology Training Project Plan

Project ID \*

PR000689

Short Name

Work Status

Active

% Planned

30.00%

Rigor Score

3.1

% Complete

27.00%

Stage

DT Standard/Completed

DT Standard/Implement

DT Standard/Study

DT Standard/Research

DT Standard/Plan

DT Standard/Close

DT Standard/Intake

- v) Update the Finish Date to Close date

Properties

Schedule

Start *	Target Go-Live Date	Committed Go-Live Date	Finish *
Apr 1, 2023	May 31, 2023	Jun 1, 2023	Aug 31, 2023

## Close Activities

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- vi) Uncheck Open for Time Entry

The screenshot shows the 'Properties' tab selected in the top navigation bar. The left sidebar has a 'Collapsible All' button and sections for 'Project Summary', 'Description', 'Stakeholders', 'Schedule', 'Status', 'Finance', and 'Admin'. The 'Admin' section is expanded, showing checkboxes for 'Above the Line' (checked) and 'Open for Time Entry' (checked, indicated by a red border). A red arrow points to the 'Open for Time Entry' checkbox. The right side of the screen shows 'Segment Priority' and 'Proposed DT Priority' fields, and a 'Security' and 'DT Prior' section.

### 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](#)

## Close Activities

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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

## Close Activities

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- iii) Make sure resources have no current/future allocations

Resource *	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
	Allocation	Allocation	Allocation	Allocation	Allocation
Wiese, Debbie	0	0	0	0	0
Scott, Steve	0	0	0	0	0
Gordon, Megan	0	0	0	0	0
Host, Janet	0	0	0	0	0
Varadarajan, Ranganathan	0	0	0	0	0

- 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

Resource *	Role	Actuals	Open for Time Entry
Wiese, Debbie	IT Leadership Team	0	<input checked="" type="checkbox"/>
Scott, Steve	IT Planning	0	<input checked="" type="checkbox"/>
Gordon, Megan	IT Planning	0	<input checked="" type="checkbox"/>
Host, Janet	IT Planning	0	<input checked="" type="checkbox"/>
Varadarajan, Ranganathan	IT Planning	0	<input checked="" type="checkbox"/>
Network Engineering	Network Engineering	0	<input checked="" type="checkbox"/>
Quality Management	Quality Management	0	<input checked="" type="checkbox"/>

## Close Activities

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- 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)

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues

Project Summary

Project Name \* Methodology Training Project Plan Status \* Approved

Project ID \* PRO00689 Short Name Progress \*

Work Status Active Started

% Planned 30.00% Rigor Score 3.1

Stage DT Standard/Close

Committed Stage Finish Date Aug 31, 2023

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues Changes

Add Staff

Resource *	Role	Actuals	Open for Time Entry	Start	Finish	Default A
Wiese, Debbie	IT Leadership Team	0		Apr 1, 2023	Jul 5, 2023	
Scott, Steve	IT Planning	0	✓	Apr 1, 2023	Aug 31, 2023	
Gordon, Megan	IT Planning	0	✓			
Host, Janet	IT Planning	0	✓	Apr 1, 2023	Aug 31, 2023	
Varadarajan, Ranganathan	IT Planning	0	✓	Apr 1, 2023	Aug 31, 2023	

- 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

Tasks

View Default Task Grid View

## Close Activities

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iv) Set Open for Time Entry to No

WBS	Name	Start	Finish	Status	% Complete	Open for Time Entry
1	Methodology Training Project Plan	Apr 1, 2023	Aug 31, 2023	Comple...	100%	
1.1	Stages	Apr 1, 2023	Aug 4, 2023	Comple...	100%	
1.1.1	Intake	Apr 3, 2023	Apr 21, 2023	Comple...	100%	
1.1.1.1	Intake Task Example #1 (*Test)	Apr 3, 2023	Apr 7, 2023	Comple...	100%	
1.1.1.2	Intake Task Example #2	Apr 10, 2023	Apr 14, 2023	Comple...	100%	
1.1.1.3	Intake Task Example #3	Apr 17, 2023	Apr 21, 2023	Comple...	100%	

7) **Send email to PPMAdmin**

- Subject: [Project] Close Activities Complete
- Body: "All PM closure activities are complete for [project]. Please complete administrative closure steps."
- The admins will:
  - Change Work Status to Completed
  - Close for Time Entry
  - Close for Financials



## Cancel Activities

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1) **Project Executive sends notice of cancellation**

- To: CIO, CTO
- CC: Business Owner, Technology Owner, Delivery Manager, Project Manager (if assigned), DTC\_IT\_Planning, any other key interested players
- Subject: "[Project Name] Cancelled"
- Body: "[Project Name] is being cancelled [for what reason]."

**The following will be done by:**

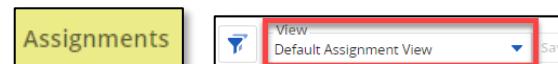
- PM or DM if it is already a "Project"
- IT Planning team if it is still an Idea

## Cancel Activities

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2) **Assignments;** Utilize the Assignments module in Clarity and the Default Assignment View

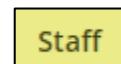
a) **Note:** Resource must be assigned to a Task  
 b) Update all Estimated Time to Complete (ETC's) to zero



Resource *	Task *	Start *	Finish *	Actuals	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023
					ETC	ETC	ETC	ETC	ETC
Scott, Steve	* Implement Time Entry *	Jun 26, 2023	Jul 14, 2023	0	0	0	0	0	0

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

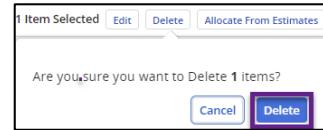
iii) If not shown already, Add Actuals to your view either by selecting Actuals or Totals > Actuals that will display in the Totals section of the view

Resource *	Role	Start	Finish	Default Al...	Actuals	Actuals	Allocation
Wiese, Debbie	IT Leadership Team			0%	0	0	
Varadarajan, Ranganathan	IT Planning	Apr 1, 2023	Aug 31, 2023	0%	0	0	
Scott, Steve	IT Planning			0%	0	0	
Quality Management	Quality Management			0%	0	0	
Prof Svc - Fixed Bid	Network Engineering			0%	1,000	1,000	
Network Engineering	IT Planning	Apr 1, 2023	Jul 5, 2023	0%	0	0	
Host, Janet				0%	450	450	
Hardware				0%	0	0	
Gordon, Megan	IT Planning			0%	0	0	

## Cancel Activities

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iv) Check the Resource with Zero (0) Actuals and select Delete



b) For any Staff with Actuals > 0

i) Clear all future allocations

Resource *	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
	Allocation	Allocation	Allocation	Allocation	Allocation
Wiese, Debbie	0	0	0	0	0
Scott, Steve	0	0	0	0	0
Gordon, Megan	0	0	0	0	0
Host, Janet	0	0	0	0	0
Varadarajan, Ranganathan	0	0	0	0	0

ii) Set Finish date to date of the email

Resource *	Role	Start	Finish	Default
			Finish	
Wiese, Debbie	IT Leadership Team	Apr 1, 2023	Aug 31, 2023	
Varadarajan, Ranganathan	IT Planning			
Scott, Steve	IT Planning			
Overdue Maintenance	Quality Management			

## Cancel Activities

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iii) Set Open for Time Entry = N

Group By			
Resource  	Role	Open for Time Entry	Start
<input type="checkbox"/> Wiese, Debbie	IT Leadership Team		
<input type="checkbox"/> Varadarajan, Ranganathan	IT Planning	<input type="checkbox"/>	
<input type="checkbox"/> Scott, Steve	IT Planning		
<input type="checkbox"/> Quality Management	Quality Management		

## 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

Properties	OTD	Staff	Tasks	Assignments	Financial Plans	Project Transaction Entry	Risks	Issues
Actions ▾								
WBS #	Name	Start	Finish	Status	% Complete	Open for Time Entry		
1	Methodology Training Project Plan	Apr 1, 2023	Aug 31, 2023	Complete...	100%			
1.1	Stages	Apr 1, 2023	Aug 4, 2023	Complete...	100%			
1.1.1	Intake	Apr 3, 2023	Apr 21, 2023	Complete...	100%			
1.1.1.1	Intake Task Example #1 (*Test)	Apr 3, 2023	Apr 7, 2023	Complete...	100%			
1.1.1.2	Intake Task Example #2	Apr 10, 2023	Apr 14, 2023	Complete...	100%			
1.1.1.3	Intake Task Example #3	Apr 17, 2023	Apr 21, 2023	Complete...	100%			

## 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

## Cancel Activities

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- ii) Update Status to Closed/Resolved

Issue Example #1 (IS000724)

Details To Dos Conversations

Name: Issue Example #1  
Priority: Medium  
Category: Schedule  
Status: Resolved  
Assigned To: Scott, Steve  
Target Res. Date: May 3, 2023  
Impact Date: May 19, 2023  
Description: An event that has occurred during a project that has a negative impact on at least one objective or resource of the project. (Check Include in Status Reporting to display)

- 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

Changes Example #1 (CR000233)

Details To Dos Conversations

ID: CR000233  
Created Date: Apr 3, 2023  
Name: Changes Example #1  
Priority: Medium  
Category: Cost  
Status: Closed  
Assigned To: Scott, Steve  
Last Updated: Jul 5, 2023  
Expected Closure Date: May 5, 2023  
Description: Activity that alters the approved Cost Schedule Performance (CSP)  
Review Date: Apr 5, 2023  
Expected Closure Date: May 5, 2023  
Category: Cost  
Include In Status Reporting:

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

- i) Ensure all data is accurate and current

Key Decisions

View DT KDs View Save

## Cancel Activities

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- ii) Update Status to Closed/Resolved

The screenshot shows the 'Key Decisions' screen with a single record selected. The record details are as follows:

- ID: KDD000619
- Name: Key Decision Exam
- Status: Complete (highlighted with a red box)
- Priority: 1-Critical
- Due Date: Jun 9, 2023
- Assigned To: Scott, Steve
- Decision Maker(s): McPherson, John
- KDD Needed: Required
- Decision Report Notes: Include Key Decision status...

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

The screenshot shows the 'Status Report' screen with a single record selected. The record details are as follows:

- ID: SR003008
- Name: Methodology - yyyyymmdd - CANCELLED (highlighted with a red box)
- Overall Status: Needs Help (60)
- Report Date: Apr 3, 2023
- Portfolio Update: > Cancelled (highlighted with a red box)

On the right side, the 'Details' panel shows the following settings:

- Update Properties checkbox (highlighted with a red box)
- Name: Methodology - yyyyymmdd - CANCELLED

**Documentation Link:** [Communication - INSTRUCTIONS - Project Status Report](#)

## Cancel Activities

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### 7) Properties:

- Confirm Project/Portfolio Status in the Project Summary section = Cancelled
- Set work Status = Cancelled
- Set Stage = Completed
- Set Committed Stage Finish Date to the Cancelled date

Properties

Project Name \*: Methodology Training Project Plan

Status \*: Cancelled

Project ID \*: PR000689

Short Name:

Work Status: Cancelled

Progress \*: Started

Stage: DT Standard/Completed

Committed Stage Finish Date: Jun 15, 2023

- 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.

- 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."

- The PPM Admins will:

- Change Work Status to Completed
- Changed [Investment] Status to Cancelled
- Close for Time Entry
- Close for Financials

Properties

Start \*: Apr 1, 2023

Target Go-Live Date:

Committed Go-Live Date:

Finish \*: Jan 31, 2024



## On-Hold Activities

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- 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

The screenshot shows the 'Properties' tab selected in the top navigation bar. The 'Project Summary' section is expanded. The 'Work Status' dropdown is set to 'On Hold' and is highlighted with a red box. The 'Stage' dropdown is also highlighted with a red box. The 'Committed Stage Finish Date' field is below these and is also highlighted with a red box.

- b) Clear Committed Stage Finish Date

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

## On-Hold Activities

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

The screenshot shows the 'Properties' tab selected in the top navigation bar. Under the 'Schedule' section, the 'Committed Go-Live Date' field is highlighted with a red box. The field contains the date 'May 1, 2023' and has a calendar icon to its right.

3) OTD – Clear any future Committed Dates

The screenshot shows the 'OTD' tab selected in the top navigation bar. A list of tasks is displayed with columns for Name, Stage, Target Start Date, Target Finish Date, Committed Start Date, Committed Finish Date, and Actual Start Date. The 'Committed Finish Date' column for the 'Close' task is highlighted with a red box. The 'Close' task has an empty 'Committed Finish Date' field.

4) **Assignments;** Utilize the Assignments module in Clarity and the Default Assignment View

- Note:** Resource must be assigned to a Task
- Update all Estimated Time to Complete (ETC's) to zero

The screenshot shows the 'Assignments' tab selected in the top navigation bar. A list of assignments is displayed with columns for Resource, Task, Start Date, Finish Date, and Actuals. The 'Default Assignment View' dropdown is highlighted with a red box. The dropdown menu shows 'Default Assignment View' selected.

5) **Tasks not started**

- Ensure any tasks have their Start and Finish dates shifted appropriately

## On-Hold Activities

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- 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

WBS	ID	Name	Start	Finish	Status	Open for Tim...
1.1.2	TSK043822	Study	Apr 24, 2023	May 12, 2023	Not Star...	
1.1.2.1	TSK043842	Study Task Example #1	Apr 24, 2023	Apr 28, 2023	Not Star...	
1.1.2.2	TSK043843	Study Task Example #2	May 1, 2023	May 5, 2023	Not Star...	
1.1.2.3	TSK043844	Study Task Example #3	May 8, 2023	May 12, 2023	Not Star...	

ID	Name	Status	Priority	Due Date	Assigned to	Decision Needed	Decision Makers
KD000679	Project has been put On Hold	In Progress	2 - High	Aug 2, 2023	Scott, Steve	Describe the reason why the project was put on hold and status: "P"	Esben shade, Mark

- 7) If Project activities have NOT started:

- a) Properties
  - i) Shift Start date to projected new date
  - ii) Shift Finish date accordingly

Properties			
<a href="#">Collapse All</a>			
> Project Summary			
> Description			
> Stakeholders			
> Schedule			
Start *		Target Go-Live Date	
Apr 1, 2023		Aug 31, 2023	

- 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

Properties							
OTD							
Staff							
Tasks							
<a href="#">Select All</a> <a href="#">Deselect All</a>		<a href="#">Group By</a>					
<input checked="" type="checkbox"/> Scott, Steve		Role		Start ↑		Finish	
<input type="checkbox"/> Host, Janet		IT Planning		Nov 1, 2023		Allocation	
<input type="checkbox"/> Varadarajan, Ranganathan		IT Planning		Nov 1, 2023		Allocation	

## On-Hold Activities

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### 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

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### 9) Status Report - create a “On-Hold” record

- Name: “[date of email] – On-Hold”
- Portfolio Update = “Project On-Hold”
- 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:

- Change Work Status to On-Hold
- Changed [Investment] Status to On-Hold
- Close for Time Entry
- Set Financial Status to Hold


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