



## 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 \(spreadsheet\)](#)

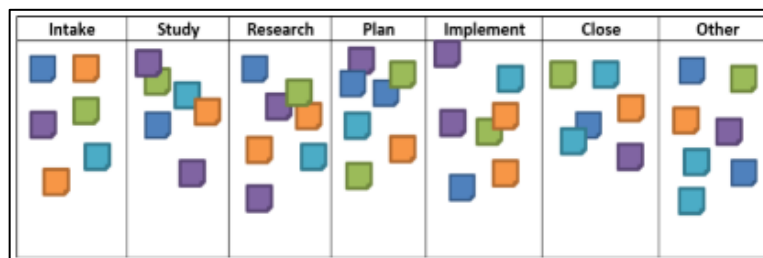
- 4) **Celebrate, provide Team Recognition**

**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

### Assignments

View  
Default Assignment View

Properties

OTD

Staff

Tasks

Assignments

Financial Plans

Project Transaction Entry

Risks

Issues

Changes

Key Decisions

Status Report

Select All

Deselect All

Group By

Resource \*

Task \*

Start \*

Finish \*

Actuals

Scott, Steve

\* Implement Time Entry \*

Jun 26, 2023

Jul 14, 2023

0

Apr 2023

May 2023

Jun 2023

Jul 2023

Aug 2023

ETC

ETC

ETC

ETC

ETC

0

0

0

0

0

- 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

### Risks

View  
Default Risk View

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

+

Select All

Deselect All

Group By

ID *	Name *	Description	ID *	Priority *	Probability	Impact	Category	Status *	Response Type
	Risk Example #1	An event that if it occurs...	R1193	Low	Medium	High	Quality (Performance)	Closed	Migrate

Risk Example #1 (R1193)

Details

To Do

Conversations

Configure

Conversation

Name \*

Risk Example #1

ID \*

R1193

Description

An event that if it occurs, causes either a positive or negative impact on the project. (Format: If this happens, then this is the impact)

Probability

Medium

Priority \*

Low

Category

Quality (Performance)

Impact

High

Response Type

Migrate

Status \*

Closed

Target Resolution Date

Apr 27, 2023

Assigned To \*

Scott, Steve

Impact Date

Apr 30, 2023

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

### Issues

View  
Default Issues View

## Close Activities

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- b) Update Status to Closed/Resolved

The screenshot shows the 'Issues' module in Clarity. The 'Status' dropdown is set to 'Resolved'. The 'Issue Example #1' details are visible on the right, including ID, Name, Priority, Category, Assigned To, Target Resolution Date, Impact Date, and Description.

- 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

**Changes** View  
DT Changes View

The screenshot shows the 'Changes' module in Clarity. The 'Status' dropdown is set to 'Closed'. The 'Changes Example #1' details are visible on the right, including ID, Name, Priority, Category, Assigned To, Created Date, Review Date, Expected Closure Date, and Description.

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

- a) Ensure all data is accurate and current

**Key Decisions** View  
DT KDs View

## 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)



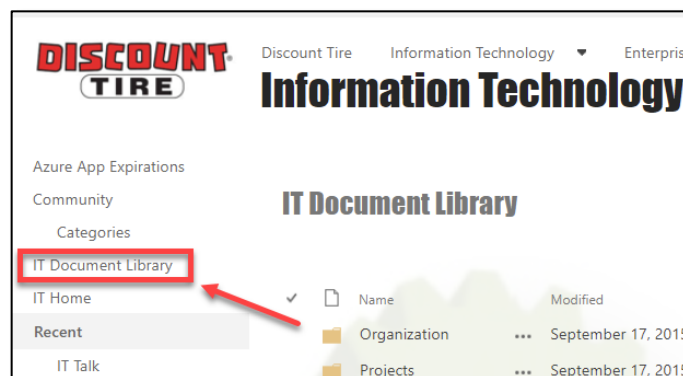
- a) Open the IT Document Library on the [Discount Tire Information Technology SharePoint Site](#)

- b) Select Information Technology

- c) Select [IT Document Library](#)

- d) Select Projects, then Projects folders

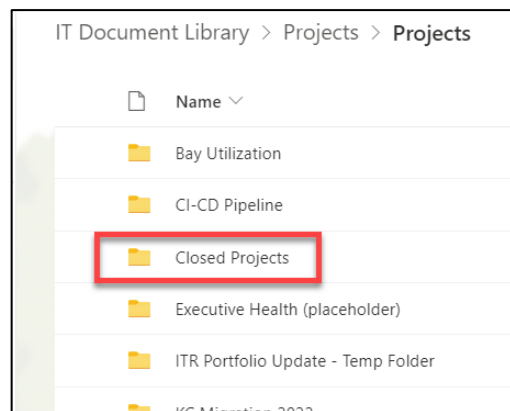
- e) Move project link to the Closed Projects folder



## 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

Properties OTD Staff <b>Tasks</b> 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	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)

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 checked="" type="checkbox"/>

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

Status Report

View  
Default Status Report View

Key Decisions **Status Report** Detailed Status Report 4 Block Status Report Links Values Capabilities Audit Scope Man

Select All Deselect All

Group By

ID \* Name \* Upd...

☒ SR003008 Methodology - yyyyymmdd - CLOSED

Methodology - yyyyymmdd - CLOSED (SR003008)

Details

☐ Update Properties

Overall Status

Needs Help 60

Report Date

Apr 3, 2023

Portfolio Update

> Project Closed

iv) **Properties**

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

(2) Set Stage to DT Standard/Completed

**Properties** OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues Changes Key Decisions Status Report Detailed Status Report

Collapse All

Project Summary

Project Name \*

Methodology Training Project Plan

Project ID \*

PR000689

Short Name

Work Status

Active

% Planned

30.00%

Rigor Score

3.1

% Complete

27.00%

Description

Methodology testing and training Project plan

Status \*

Approved

Progress \*

Started

Stage

DT Standard/Completed

DT Standard/Implement

DT Standard/Study

DT Standard/Research

DT Standard/Plan

DT Standard/Close

DT Standard/Initial

## 3) Complete Financial Closure



## 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
- 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*

Project Transaction Entry



Reports and Jobs

DT - Financial Forecast Review by Plan Grouping

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

- iv) Select the following Parameters

(1) Investment Type – All

INVESTMENT TYPE

All

(2) Investment – Search for the project

INVESTMENT

(3) Fiscal Year(s) for the project

Methodology Training Project Plan

(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

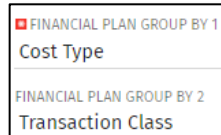
**Note:** *All other parameters, no selection is necessary*

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

## Close Activities

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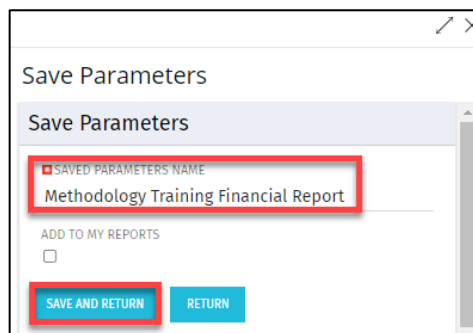
(2) Save and Return



(3) Select Submit to run the .pdf report



**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




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

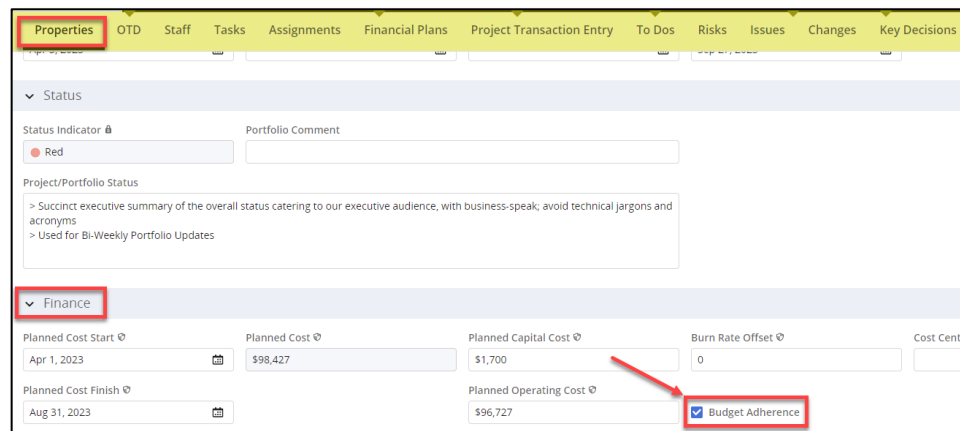
**Documentation Link:** [Project Cost Management](#)

## 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



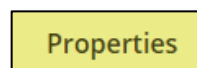
- 4) **Ensure Resource Managers initiate Workday termination of all contractors being rolled off (Staff Aug and Fixed bid);** This should trigger removal of system access and VPN Accounts

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



- 6) **Complete Clarity Close Tasks**

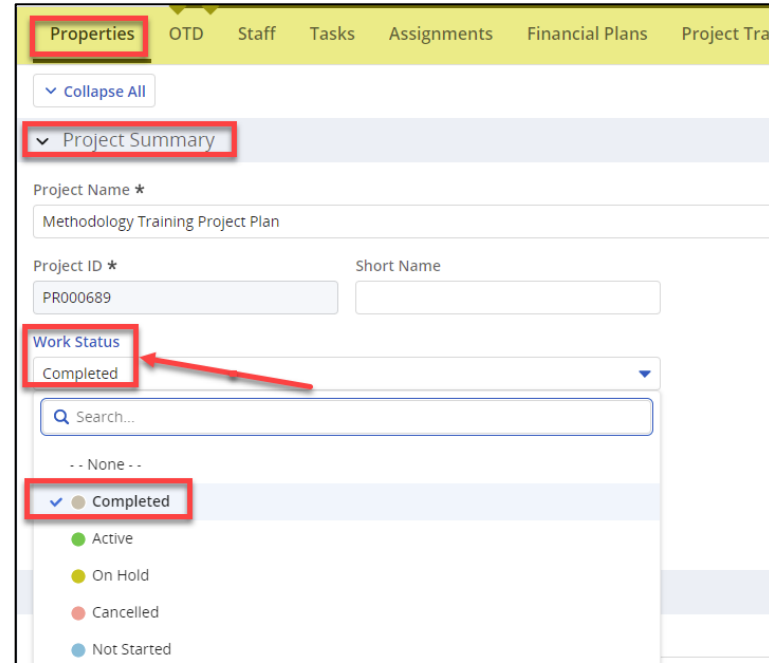
- a) **Properties;** Utilize the Properties module in Clarity



## Close Activities

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i) Set Work Status to Completed



The screenshot shows the 'Properties' tab of a project management system. The 'Project Summary' section is expanded, displaying the following fields:

- Project Name \***: Methodology Training Project Plan
- Project ID \***: PR000689
- Short Name**: (empty field)
- Work Status**: A dropdown menu is open, showing the following options:
  - Completed (selected, indicated by a checkmark and a red box)
  - Active
  - On Hold
  - Cancelled
  - Not Started

A red arrow points to the 'Completed' option in the dropdown menu.

## Close Activities

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

**Properties** OTD Staff Tasks Assignments Financial Plans Proj

▼ Collapse All

▼ Project Summary

Project Name \*  
Methodology Training Project Plan

Project ID \* Short Name  
PR000689

Work Status  
Active

% Planned  
100.00%

% Complete  
100.00%

Rigor Score  
3.1

- iv) Set Stage to DT Standard/Completed

**Properties** OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues Changes Key Decisions Status Report Detailed Status Re

▼ Collapse All

▼ Project Summary

Project Name \*  
Methodology Training Project Plan

Project ID \* Short Name  
PR000689

Work Status  
Active

% Planned  
30.00%

% Complete  
27.00%

Rigor Score  
3.1

Stage  
DT Standard/Completed

DT Standard/Implement  
DT Standard/Study  
DT Standard/Research  
DT Standard/Plan  
DT Standard/Close  
DT Standard/Write

- v) Update the Finish Date to Close date

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

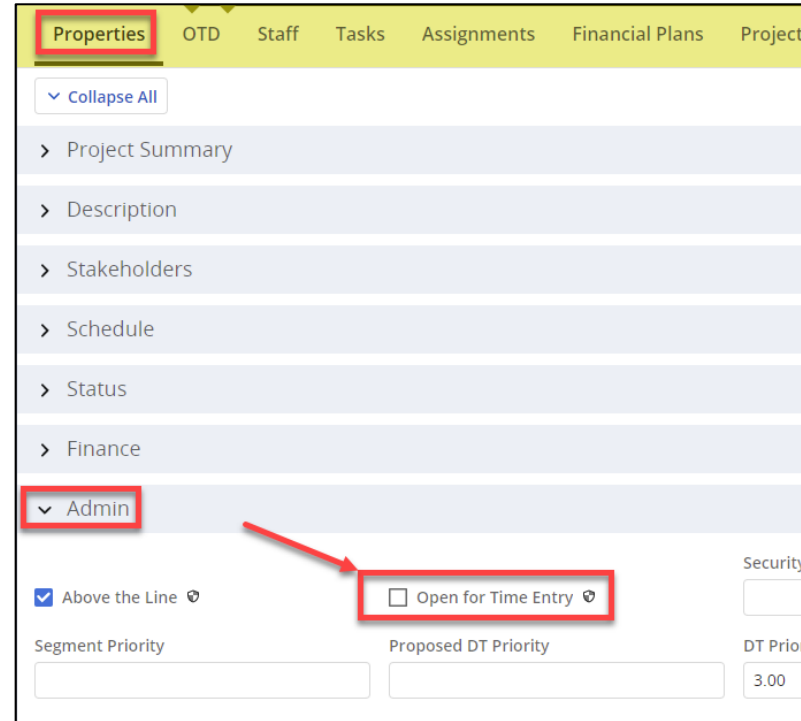
▼ Schedule

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 in the PMO software. The 'Admin' section is expanded, and the 'Open for Time Entry' checkbox is highlighted with a red box and an arrow pointing to it. The 'Above the Line' checkbox is checked. The 'Segment Priority' and 'Proposed DT Priority' fields are empty. The 'DT Priority' field shows a value of 3.00.

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

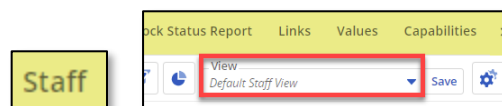
**Documentation Link:** [PMO - Control - QRG - Clarity \(CA PPM\) - On Time Delivery](#)

## Close Activities

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Name	Stage	Target Start	Target Finish	Committed Start	Committed Finish	Actual Start Date	Actual Finish Date	On Time Finish	Comm...
<input type="checkbox"/> Intake	Intake	May 1, 2023	May 15, 2023	May 1, 2023	May 15, 2023	May 1, 2023	May 19, 2023	(4)	
<input type="checkbox"/> Study	Study	May 16, 2023	May 31, 2023	May 16, 2023	May 31, 2023	May 20, 2023	Jun 2, 2023	(2)	
<input type="checkbox"/> Research	Research	Jun 1, 2023	Jun 15, 2023	Jun 1, 2023	Jun 15, 2023	Jun 3, 2023	Jun 10, 2023	(5)	
<input type="checkbox"/> Plan	Plan	Jun 16, 2023	Jun 30, 2023	Jun 16, 2023	Jul 15, 2023	Jun 11, 2023	Jul 22, 2023	(7)	
<input type="checkbox"/> Implement	Implement	Jul 1, 2023	Aug 31, 2023	Jul 16, 2023	Aug 15, 2023	Jul 23, 2023	Aug 14, 2023	(11)	
<input type="checkbox"/> Go Live	Go Live	Sep 1, 2023	May 31, 2023	Aug 16, 2023	Jun 1, 2023	Aug 15, 2023	May 31, 2023	(11)	
<input type="checkbox"/> Close	Close	Sep 2, 2023	Sep 16, 2023	Aug 17, 2023	Aug 31, 2023	Aug 16, 2023	Aug 31, 2023	(0)	

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)

Role	Resource	Resource Manager	Total Actuals	Allocation	Allocation
<b>Total</b>			0.00	0.00	0.00
<input type="checkbox"/> IT Planning	Gordon, Megan	Wiese, Debbie	0.00	0.00	0.00
<input type="checkbox"/> IT Planning	Host, Janet	Wiese, Debbie	0.00	0.00	0.00
<input type="checkbox"/> Network Engineering	Network Engineering	Rainey, Daniel	0.00	0.00	0.00
<input type="checkbox"/> Quality Management	Quality Management	Moore, Mike	0.00	0.00	0.00
<input type="checkbox"/> IT Planning	Scott, Steve	Wiese, Debbie	0.00	0.00	0.00
<input type="checkbox"/> IT Planning	Varadarajan, Ranganathan	Wiese, Debbie	0.00	0.00	0.00
<input type="checkbox"/> IT Leadership Team	Wiese, Debbie	McPherson, John	0.00	0.00	0.00

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

Resource	Role	Actuals	Open for Time ...	Start	Finish
<input type="checkbox"/> Wiese, Debbie	IT Leadership Team	0	✓		
<input type="checkbox"/> Scott, Steve	IT Planning	0	✓		
<input type="checkbox"/> Gordon, Megan	IT Planning	0	✓		
<input type="checkbox"/> Host, Janet	IT Planning	0		Apr 1, 2023	Aug 31, 2023
<input type="checkbox"/> Varadarajan, Ranganathan	IT Planning	0	✓	Apr 1, 2023	Aug 30, 2023
<input type="checkbox"/> Network Engineering	Network Engineering	0	✓		

## 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
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	Start
Wiese, Debbie	IT Leadership Team	0	<input 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)

Resource *	Role ↑	Actuals	Open for Time Entry	Start	Finish	Default A
<input type="checkbox"/> Wiese, Debbie	IT Leadership Team	0				
<input type="checkbox"/> Scott, Steve	IT Planning	0	✓			
<input type="checkbox"/> Gordon, Megan	IT Planning	0	✓			
<input type="checkbox"/> Host, Janet	IT Planning	0		Apr 1, 2023	Jul 5, 2023	
<input type="checkbox"/> 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

## Close Activities

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iv) Set Open for Time Entry to No

Properties OTD Staff <b>Tasks</b> 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	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

To
 ☒ PPMAdmin;



## 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

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

Assignments

View  
Default Assignment View

Properties

OTD

Staff

Tasks

Assignments

Financial Plans

Project Transaction Entry

Risks

Issues

Changes

Key Decisions

Status Rep

Download

Select All

Deselect All

Group By

Resource *	Task *	Start *	Finish *	Actuals	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023
<div><div><input type="checkbox"/></div><div>Scott, Steve</div></div>	* Implement Time Entry *	Jun 26, 2023	Jul 14, 2023	0	ETC	ETC	ETC	ETC	ETC
					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

Staff

Columns

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

Properties

OTD

**Staff**

Tasks

Assignments

Financial Plans

Project Transaction Entry

Risks

Issues

Changes

Key Decisions

Status Report

Detailed

Add Staff

Select All

Deselect All

1 Item Selected

Edit

**Delete**

Allocate From Estimates

Group By

Per-Period Metrics - 36 Periods

View

Default Staff View

Save

Resource *	Role	Start	Finish	Default Al...	Actuals	Totals	Allocation	Search...
<input checked="" type="checkbox"/> Wiess, Debbie	IT Leadership Team			0%	0	0		<input checked="" type="checkbox"/> Resource
<input type="checkbox"/> Varadarajan, Ranganathan	IT Planning	Apr 1, 2023	Aug 31, 2023	0%	0	0		<input type="checkbox"/> Role
<input type="checkbox"/> Scott, Steve	IT Planning			0%	0	0		<input type="checkbox"/> Open for Time Entry
<input type="checkbox"/> Quality Management	Quality Management			0%	0	0		<input checked="" type="checkbox"/> Start
<input type="checkbox"/> Prof Svcs - Fixed Bid				0%	1,000	1,000		<input type="checkbox"/> Finish
<input type="checkbox"/> Network Engineering	Network Engineering			0%	0	0		<input checked="" type="checkbox"/> Default Allocation
<input type="checkbox"/> Host, Janet	IT Planning	Apr 1, 2023	Jul 5, 2023	0%	0	0		<input checked="" type="checkbox"/> Actuals
<input type="checkbox"/> Hardware				0%	450	450		<input type="checkbox"/> Allocation
<input type="checkbox"/> Gordon, Megan	IT Planning			0%	0	0		<input type="checkbox"/> ETC

Totals

☒ Actuals

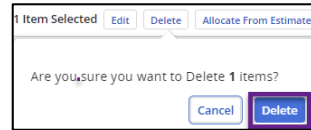
☐ Allocation

☐ ETC

## Cancel Activities

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



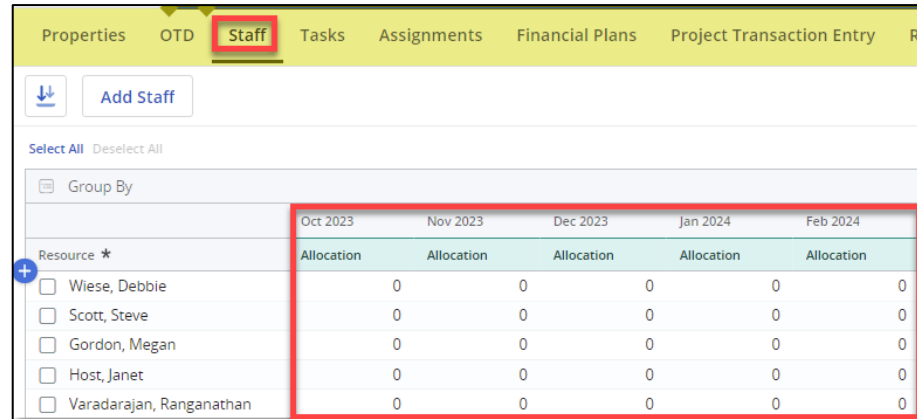
1 Item Selected | Edit | Delete | Allocate From Estimates

Are you sure you want to Delete 1 items?

Cancel Delete

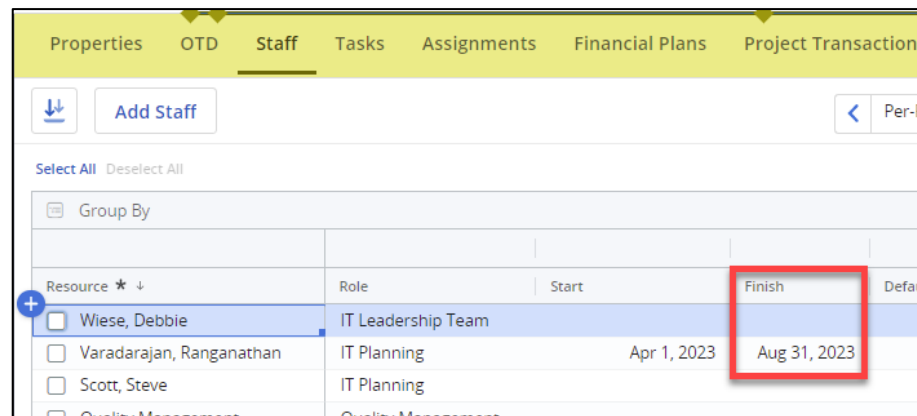
- b) For any Staff with Actuals > 0

- i) Clear all future allocations



Resource *	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
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
Wiese, Debbie	IT Leadership Team		Aug 31, 2023
Varadarajan, Ranganathan	IT Planning	Apr 1, 2023	
Scott, Steve	IT Planning		

## 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 checked="" type="checkbox"/>	
<input type="checkbox"/> Varadarajan, Ranganathan	IT Planning	<input type="checkbox"/>	
<input type="checkbox"/> Scott, Steve	IT Planning	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Quality Management	Quality Management	<input checked="" type="checkbox"/>	

## 4) Tasks

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

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

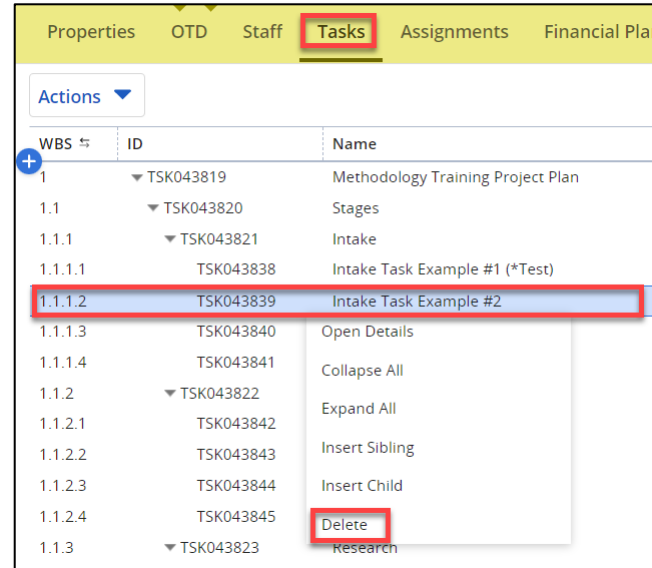
iv) Open for Time Entry = No

Properties OTD Staff <b>Tasks</b> 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	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%	

## Cancel Activities

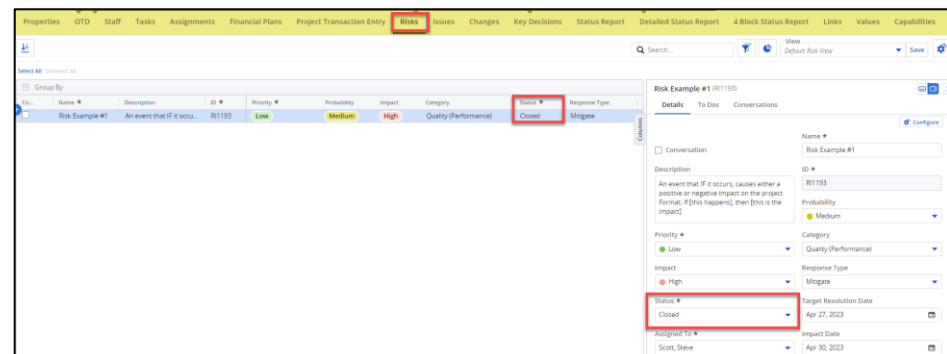
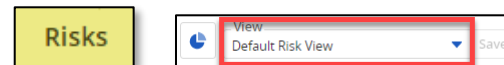
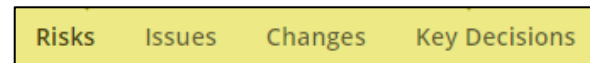
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- b) **Tasks not started** - unless there is a desire to keep the schedule for future reference, delete them. If want to keep, follow steps for in-flight tasks
  - i) Right click on task, select Delete

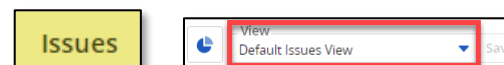


- 5) Close out any RAID items; Utilize the applicable module

- 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

The screenshot shows the 'Issues' module in Clarity. The top navigation bar includes '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', and 'Capabilities'. The 'Issues' tab is selected. Below the navigation bar, there is a table of issues. The first row is 'Issue Example #1' with ID 'IS000724', Priority 'Medium', Category 'Schedule', and Status 'Resolved'. The 'Status' column is highlighted with a red box. To the right of the table is a detailed view for 'Issue Example #1'. The 'Status' dropdown menu is open, showing 'Resolved' as the selected option, which is also highlighted with a red box.

- 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

The screenshot shows the 'Changes' module in Clarity. The top navigation bar is the same as the previous screenshot. The 'Changes' tab is selected. Below the navigation bar, there is a table of changes. The first row is 'Changes Example #1' with ID 'CR000233', Status 'Closed', Priority 'Medium', and Assigned To 'Scott, Steve'. The 'Status' column is highlighted with a red box. To the right of the table is a detailed view for 'Changes Example #1'. The 'Status' dropdown menu is open, showing 'Closed' as the selected option, which is also highlighted with a red box.

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

- i) Ensure all data is accurate and current

The screenshot shows the 'Key Decisions' module in Clarity. The top navigation bar is the same as the previous screenshots. The 'Key Decisions' tab is selected. Below the navigation bar, there is a table of key decisions. The first row is 'Key Decisions View' with ID 'KD000001', Status 'Open', Priority 'Medium', and Assigned To 'Scott, Steve'. The 'Status' column is highlighted with a red box. To the right of the table is a detailed view for 'Key Decisions View'. The 'Status' dropdown menu is open, showing 'Open' as the selected option, which is also highlighted with a red box.

## Cancel Activities

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- ii) Update Status to Closed/Resolved

The screenshot shows the 'Key Decisions' interface. A table lists key decisions with columns for ID, Name, Status, Priority, Due Date, Assigned to, Decision Maker(s), KDD Needed?, and Status Report Notes. The 'Status' column for the first entry (KD000619) is highlighted with a red box and set to 'Complete'.

### 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](#)

The screenshot shows the 'Status Report' interface. A table lists status reports with columns for ID, Name, and Portfolio Update. The 'Name' column for the first entry (SR003008) is highlighted with a red box and set to 'Methodology - yyyyymmdd - CANCELLED'. The 'Update Properties' checkbox is checked, and the 'Portfolio Update' dropdown is set to '> Cancelled'.



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

▼ Collapse All

▼ Project Summary

Project Name \* Methodology Training Project Plan

Project ID \* PR000689 Short Name

Work Status Cancelled

% Planned 30.00% Rigor Score 3.1

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.

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

▼ Collapse All

Project Summary

Description

Stakeholders

▼ Schedule

Start \* Apr 1, 2023 Target Go-Live Date Committed Go-Live Date Finish \* Jan 31, 2024

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

To PPMAdmin;

"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



## On-Hold Activities

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### 1) Project Executive send notice of project being put On-Hold

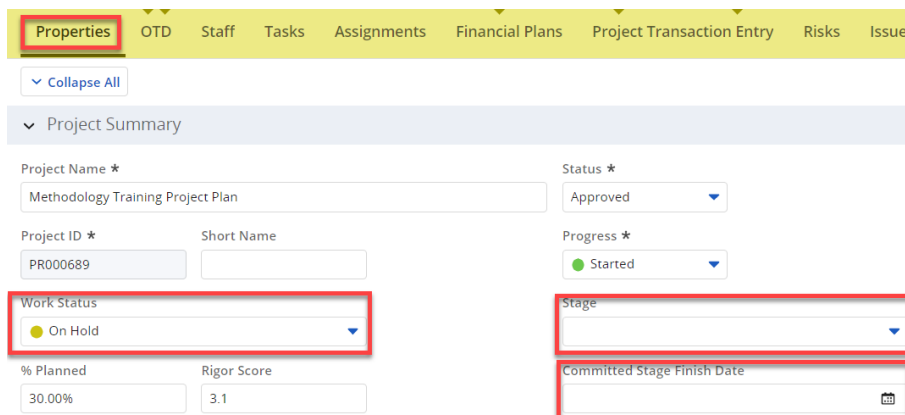
- To: CIO, CTO
- CC: Business Owner, Technology Owner, Delivery Manager, Project Manager (if assigned), DTC\_IT\_Planning, any other key interested players
- Subject: "[Project Name] On-Hold"
- Body: "[Project Name] is being placed On-Hold [for what reason]."

### The following Clarity activities will be done by:

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

### 2) Properties

- Set Status to On-Hold



The screenshot shows the 'Properties' tab selected in the Clarity interface. The 'Project Summary' section contains the following fields:

- Project Name \***: Methodology Training Project Plan
- Status \***: Approved
- Project ID \***: PR000689
- Short Name**: (empty)
- Progress \***: Started
- Work Status**: On Hold (highlighted with a red box)
- Stage**: (empty, highlighted with a red box)
- % Planned**: 30.00%
- Rigor Score**: 3.1
- Committed Stage Finish Date**: (empty, highlighted with a red box)

- Clear Committed Stage Finish Date

- 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

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry

▼ Collapse All

> Project Summary

> Description

> Stakeholders

▼ Schedule

Start \* Apr 1, 2023

Target Go-Live Date

Committed Go-Live Date

Finish \* Aug 31, 2023

- 3) OTD – Clear any future Committed Dates

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

Select All Deselect All

Group By

Name *	Stage *	Target Start Date *	Target Finish Date *	Committed Start Date *	Committed Finish Date *	Actual Start Date *
<input type="checkbox"/> Intake	Intake	May 1, 2023	May 15, 2023	May 1, 2023	May 15, 2023	
<input type="checkbox"/> Study	Study	May 16, 2023	May 31, 2023	May 16, 2023	May 31, 2023	
<input type="checkbox"/> Research	Research	Jun 1, 2023	Jun 15, 2023	Jun 1, 2023	Jun 15, 2023	
<input type="checkbox"/> Plan	Plan	Jun 16, 2023	Jun 30, 2023			
<input type="checkbox"/> Implement	Implement	Jul 1, 2023	Aug 31, 2023			
<input type="checkbox"/> Go Live	Go Live	Sep 1, 2023	May 31, 2023			
<input type="checkbox"/> Close	Close	Sep 2, 2023	Sep 16, 2023			

- 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

Assignments

View Default Assignment View Save

Properties OTD Staff Tasks Assignments Financial Plans Project Transaction Entry Risks Issues Changes Key Decisions Status Reports

Select All Deselect All

Group By

Resource *	Task *	Start *	Finish *	Actuals	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023
<input type="checkbox"/> Scott, Steve	* Implement Time Entry *	Jun 26, 2023	Jul 14, 2023	0	ETC	ETC	ETC	ETC	ETC

- 5) **Tasks not started**

- a) 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

WBS	ID	Name	Start	Finish	Status	Open for Time Entry
1.1.2	TSK043822	Study	Apr 24, 2023	May 12, 2023	Not Star...	No
1.1.2.1	TSK043842	Study Task Example #1	Apr 24, 2023	Apr 28, 2023	Not Star...	No
1.1.2.2	TSK043843	Study Task Example #2	May 1, 2023	May 5, 2023	Not Star...	No
1.1.2.3	TSK043844	Study Task Example #3	May 8, 2023	May 12, 2023	Not Star...	No

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

ID	Name	Status	Priority	Due Date	Assigned to	Decision Needed	Decision Maker(s)
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. "Pr...	Esbenshade, Mark

7) If Project activities have NOT started:

a) Properties

i) Shift Start date to projected new date

ii) Shift Finish date accordingly

Start *	Target Go-Live Date	Committed Go-Live Date	Finish *
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

Resource *	Role	Start	Finish	Totals	Nov 2023	Dec 2023	Jan 2024
Scott, Steve	IT Planning	Nov 1, 2023		30	10	10	10
Host, Janet	IT Planning	Nov 1, 2023		60	20	20	20
Varadarajan, Ranganathan	IT Planning	Nov 1, 2023		90	30	30	30

## 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

Resource *	Role	Start	Finish	Allocation	Nov 2023	Dec 2023	Jan 2024
Scott, Steve	IT Planning	Nov 1, 2023	Dec 29, 2023	20	10	10	0
Host, Janet	IT Planning	Nov 1, 2023	Nov 27, 2023	17	17	0	0
Varadarajan, Ranganathan	IT Planning	Nov 1, 2023	Jan 31, 2024	90	30	30	30

### 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

WBS	ID	Name	Start	Finish	Status	% Comple...	Open for Time Entry
1.1.2.1	TSK043842	Study Task Example #1	Apr 24, 2023	Apr 28, 2023	Started	10%	
1.1.2.2	TSK043843	Study Task Example #2	May 1, 2023	May 5, 2023	Started	20%	
1.1.2.3	TSK043844	Study Task Example #3	May 8, 2023	May 12, 2023	Started	30%	

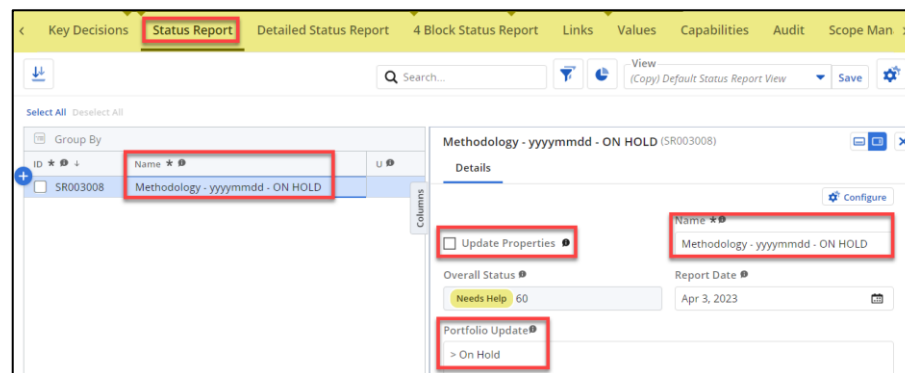
## On-Hold Activities

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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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**P<sup>3</sup>MO** Delivering Successful Portfolios, Program and Projects

