

Overview

This Job Aid defines the steps to follow for closing a project in the platform.

Projects should be formally closed to ensure that organisational reports properly reflect active and closed projects.

There are seven (7) actions associated with closing a project, you should apply the appropriate ones based on how your project was managed in the platform.

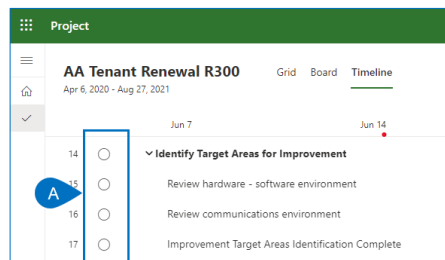
1. Close out remaining work.
2. Complete key dates and deliverables.
3. Reconcile project financials.
4. Finalise project artifacts.
5. Advance the project to the next stage.
6. Produce the final project status update.
7. Harvest lessons learned.

Close out remaining work

 Project Manager  Project for the web – Project to be closed is open

1. REVIEW OPEN TASKS AND MARK THEM AS COMPLETE

- a. Review all tasks and milestones in the project schedule that have remaining work (% complete not 100%) to validate that the work is complete, and the project can be closed.
- b. Mark tasks and milestones as complete by clicking in the **circle**, in any view: Grid, Board, or Timeline.



Complete key dates and deliverables

 Project Manager  Project for the web – Project to be closed is open
Projects – Key Dates and Deliverables

2. COMPLETE KEY DATES

- a. Open the **Key Dates** tab for the project. For all Key Dates that are not **Done** if the dates match, drag and drop the **Key Date card** to the **Done** column. If the dates do not match, select the **pencil** icon (or double click the Key Date card).

New course outline

Course outline modified to be all inclusive

May 4, 2020

A (points to the text area)

B (points to the 'Edit' button)

- Update the **Date** to reflect the current schedule.
- Set the **Status** to **Done**.

Software Contents defined

Key Date

General Related

Name * Software Contents defined

Date 21-Jun-20

Description ---

Status **High risk**

Not set

On track

At risk

High risk

Done

B (points to the Date field)

C (points to the Status dropdown menu)

3. COMPLETE DELIVERABLES

- Open the **Deliverables** tab for the project. For all Deliverables that are not **Completed** select the **Deliverable** row.
- Click **Edit** (or double click the Deliverable name).

Deliverables for Project

B (points to the 'Edit' button)

✓	Name	Category	Assigned To	Due Date	Status Reason
A	Completion Certificate	Other	Doug Brown	24-Apr-20	Not Started

- Update the **Due Date** to reflect the current schedule.
- Set the **Status** to **Completed**.

Project Scope Reports

Deliverable

AA Tenant Renewal R300 Project

General Related

Name * Project Scope Reports

Description Activities to complete the project scope and produce team and management reports.

Progress Update ---

Category New Capability

Assigned To Bret Prinz

C (points to the Due Date field)

D (points to the Status dropdown menu)

Due Date ---

Status Completed

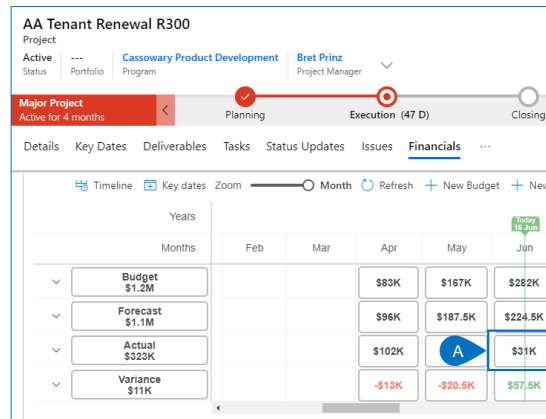
Reconcile project financials

Project Manager

Projects – Financials

4. FINALISE PROJECT FINANCIALS

- Open the **Financials** tab for the project. Review the Financial page to validate that all actual costs have been recorded. Click on the Actual card to adjust the actual costs as needed.



- b. Adjust the actual costs (or click **+ New Cost**) as appropriate to reflect the final costs for the project.

Cost for Period: June 2020

Search + New Cost

Category/Name	Date	Forecast	Actual	Transaction Note	Budget	Variance
Capex		\$62,500.00	\$26,000.00		\$175,000.00	\$112,500.00
Hardware	10 Jun 2020	\$ 50000	\$ 20000			
Software	20 Jun 2020	\$ 12500	\$ 6000			
Opex		\$162,000.00	\$5,000.00		\$107,000.00	-\$55,000.00
Labor	29 Jun 2020	\$ 11000	\$ 5000			
Promotional Materials	6 Jun 2020	\$ 15000				
Software Maintenance - Quarterly	30 Jun 2020	\$ 25000				
Travel and Expenses	20 Jun 2020	\$ 12000				
Totals:		\$224,500.00	\$31,000.00		\$282,000.00	\$57,500.00

Finalise project artifacts



Project Manager



Projects – Issues, Risks, and Changes tabs

5. CLOSE ALL OPEN ISSUES

- a. Open the **Issues** tab for the project. For all the issues that are active, select the appropriate **Issue row**.
- b. Click **Edit** (or double click the Issue name).

Issues for Project

Name	Assigned To	Status Reason	Priority
Deployment Logistics tasks underestimated	Albert Connell	Active	Medium

- c. Set the **Status** to **Closed**.
- d. Update the **Resolution** to reflect the reason for closing the Issue.

Deployment Logistics tasks underestimated

Status: **Closed**

Resolution: Project is closed

6. CLOSE ALL OPEN RISKS

- Open the **Risks** tab for the project. For all the risks that are active, select the appropriate **Risk row**.
- Click **Edit** (or double click the Risk name).

AA Tenant Renewal R300 Project

Major Project Active for 4 months

Planning Execution (48 D) Closing

Risk Matrix

Risks

Developer creativity to perform unnecessary development activity

Technology Bret Prinz Active AA Tenant Renewal R300

Edit

- Set the **Status** to **Closed**.

Developer creativity to perform unnecessary development activity

Risk

General Related

Name * Developer creativity to perform unnecessary development activity

Assigned To Bret Prinz

Status Closed

7. CLOSE ALL OPEN CHANGE REQUESTS

- Open the **Changes** tab for the project. For all the change requests that are New, On hold or Submitted, select the appropriate **Change Request row**.
- Click **Edit** (or double click the Change Request name).

AA Tenant Renewal R300 Project

Major Project Active for 4 months

Planning Execution (48 D) Closing

Change Requests

Change Requests for Project

Evaluate need for additional Analysis 13-M... Schedule Steve Router Medium Approved AA Tenant Renewal R300

Automatically change the user screen resolution based on the resolution of the display monitor. 26-Jun-20 Scope Eddie Mason High New AA Tenant Renewal R300

Edit

- Set the **Status** to **Rejected**.

Automatically change the user screen resolution based on the resolution of the display monitor.

Change Request

General Related

Name * Automatically change the user screen resolution based on the resolution of the display monitor.

Description Screens need to display both 1600x1200 and 800x600 depending upon the display monitor. The new code must automatically adjust the resolution during the screen initialization.

Driven By Business

Implementation Date 25-Jun-20

Category Scope

Priority High Medium Low

Assigned To Eddie Mason

Work Effort Estimate 72

Work Effort Details Each screen will modification is estimated to take 12 hours. There are 6 screens which require this CR modification

Cost Estimate \$11,200.00

Cost Estimate Details Based upon an hourly rate of \$150.

Duration Estimate 15

Duration Estimate Details Overall duration is based on 60% resource availability assignment.

Resource Impacts Absorb within development team

Impact on Other Projects None known Projects are impacted

Assumptions

Approved / Rejected By

Approved / Rejected Date

Due Date 26-Jun-20

Status Rejected

Advance the project to the next stage



Project Manager



Projects

8. ADVANCE THE PROJECT

- Click on the current stage which is identifiable by the **red dot/red circle** icon.
- Validate that you have completed all the **checklist items**.
- Click **Next Stage** to advance the project.

Produce the final project status update



Project Manager



Projects – Status Updates

Projects – Status Report

9. SET PROJECT KPI AND STATUS NARRATIVE

- Open the **Status Updates** tab for the project and click **+ New Status Update**.

- Create a new project status update to reflect the overall project status on closing. Ensure the Status Date is set to reflect the project close date.
- Define the overall project status. Set the Project KPI and provide a clear and concise narrative to describe the overall status of the project.

- d. Set the KPI and provide a status narrative for the other relevant status areas for the overall project based on your project stakeholder's information requirements.

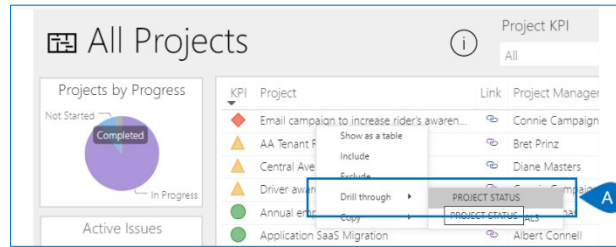
10. REVIEW AND VERIFY THE PROJECT STATUS REPORT

- a. Select **Run Report** from the command bar. Select the appropriate style of status report from the list.

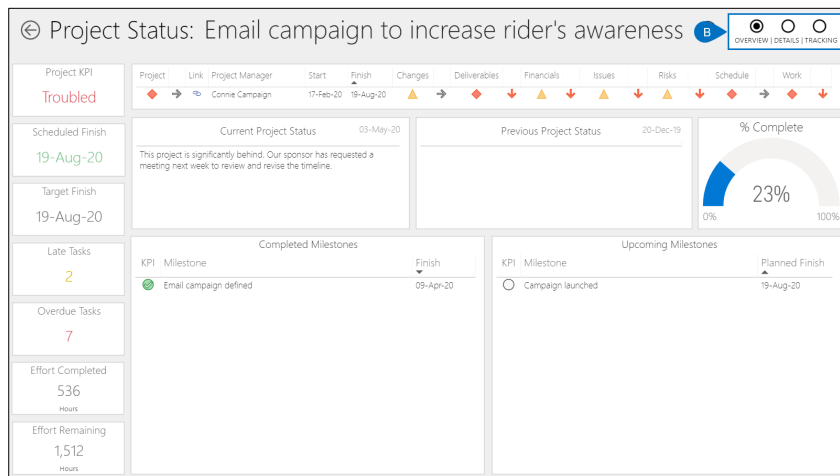
- b. Review the project status report and validate that the status report reflects the overall project status at the time of closing. Return to the Project to ensure that the status report is accurate and consistent with the overall project's status.

11. REVIEW AND VERIFY THE INSIGHTS STATUS REPORT

- Right-mouse click** the current project and click **Drill through** and then select **Project Status**.



- Review the three pages (Overview, Details and Tracking) and validate that the status report delivers the appropriate message to the project stakeholders. Return to the Project and/or Project for the web to ensure that the status report is accurate and consistent with the project's status.



Harvest Lessons Learned



Project Manager

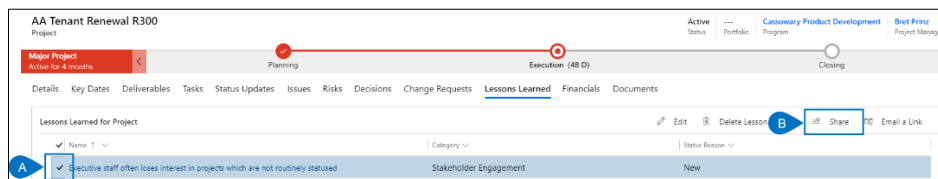


Projects – Lessons Learned

Projects – Deliverables

12. HARVEST LESSONS LEARNED

- Open the **Lessons Learned** tab for the project and review the list for any lessons learned that have an organisational focus. Select the appropriate **Lessons Learned** row.
- Click **Share** and notify the PMO/Best Practices organisation.



13. HARVEST REUSABLE OR SAMPLE DOCUMENTS

- Open the **Documents** tab for the project and review the list for any lessons learned that have an organisational focus. Identify any documents that have reusable or sample value to the organisation and notify the PMO/Best Practices organisation.