

## Appendix J: Project Closing Checklist

The following checklist is to be used by *Project Managers* when closing a project in *Clarity*. Refer to the appropriate section of the *Project Management (PM) Handbook* for *Project Closing* details. The checklist can be created from the *Project Closing Checklist* template and saving it as a separate document.

Done (✓)	Step	Project Planning Task	Refer to:
	1	Review <i>PM</i> handbook, <i>Section 9: Closing Projects</i> .	<i>Section 9: Closing Projects</i>
	2	Update the project <i>Return on Investment (ROI) Analysis</i> (if applicable).	<i>Section 9: Closing Projects, ROI Analysis</i>
	3	Obtain <i>Project Sponsor</i> signoff on the <i>Scope &amp; Approach</i> and return to the <i>IT Administration Office</i> .	<i>Section 9: Closing Projects, Scope &amp; Approach Signoff</i>
	4	Verify all <i>Issues</i> have been closed and <i>Change Requests</i> completed in <i>Clarity</i> .	<i>Section 9: Closing Projects, Close Issues and Complete Change Requests</i>
	5	From <i>Open Workbench, Closed Projects</i> folder, <i>Closed Project Review</i> view, change all task estimates (ETC) to blank by entering a zero.  Complete all tasks and milestones and ensure task <i>End Date</i> is prior or equal to today's date.  Note: Enter a zero where a zero is present to create a blank in the estimate (ETC).	<i>Section 9: Closing Projects, Closing a Project in Open Workbench</i>
	6	From <i>Open Workbench, Closed Projects</i> folder, <i>Variance Explanation Detail Plan</i> view, enter a <i>Variance Explanation</i> for projects that show a variance of +/- 20%.	<i>Section 9: Closing Projects, Closing a Project in Open Workbench</i>
	7	From <i>Open Workbench, Closed Projects</i> folder, <i>PM Metrics Unbaselined Tasks w/ no Category</i> view, verify that all unbaselined tasks have a <i>Category</i> code (see Appendix C: Task Category Field Standards). Contact a member of the PMO team for any questions relating to activity/task categories.	<i>Section 9: Closing Projects, Closing a Project in Clarity Open Workbench</i>  <i>Appendix C: Task Category Field Standards</i>
	8	From <i>Open Workbench, Closed Projects</i> folder, <i>PM Metrics Task IDs</i> view, verify the following: Project Management tasks have IDs beginning with 0001* <i>Initial Planning</i> task ID is 000110 <i>Vendor Management</i> ID is 000125 <i>Source System Consulting</i> task ID is 000310 <i>Contingency</i> tasks IDs are **997	<i>Section 9: Closing Projects, Closing a Project in Open Workbench</i>
	9	Submit an email to the <i>Project Management Office (PMO)</i> to close the project in <i>Clarity</i> .	<i>Section 9: Closing Projects, Request PMO to Close the Project</i>