Section 9: *Closing Projects*

Overview

Prior to closing any detailed project plan, the *Project Manager* must update the *ROI Analysis*, obtain *Project Sponsor* signoff on the *Scope & Approach*, file original documents in the *IT Administration Office*, verify *Issues* and *Change Requests* have been updated, update the project in *Open Workbench,* and notify *Project Management Office (PMO)* to close the project.

ROI Analysis

Update the *ROI Analysis* spreadsheet with final project cost information. The *ROI Cost* portlet located in Clarity under the Home menu, PM Portlets link can be used to obtain the final labor cost for the project. The *ROI Analysis* spreadsheet should also be updated with final costs on other technical items such as hardware, software, etc. Attach the updated *ROI Analysis* to the project in *Clarity*.

Scope & Approach Signoff

Obtain the *Project Sponsor's* signature on the *Scope & Approach Project Complete Authorization* section. File the original signed documents with the project documentation in the *IT Administration Office*. Be sure to forward copies of the signed documents to the *Project Sponsor*.

> S *All projects must have signoff from the Project Sponsor on original Scope & Approach document and the ROI Analysis. All original documents are located in the IT Administration Office.*

Closing a Project in Open Workbench

Closing a project in *Open Workbench* requires entering a zero for all task estimates, completing tasks and milestones, updating end dates, and providing an explanation for projects that show a variance of plus or minus 20%.

1. Launch *Open Workbench.*

2. From the **Closed Project Review** view in the **Closed Projects** folder, change all tasks estimates *(ETC)* to blank by entering a zero. If the estimate shows a zero, enter a zero again to force the estimate to display a blank. The task end date cannot be changed if the estimate is not blank.

3. From the **Add Tasks w/Baseline** view in the **Favorites** folder review task and milestone *Status* and *End Dates*; end dates should be less than or equal to today's date and status should be completed.

4. From the **Variance Explanation Detail Plan** view in the **Closed Projects** folder, enter an explanation for detail projects that show a variance of plus or minus 20%.
    a. Double click the gray box next to the project name.
    b. Click the **Notes** tab.
    c. Enter a variance explanation in the white box.
    d. Click the **Add** button.

5. Validate Task *Category Codes*.
   a. Click on the **PM Metrics Unbaselined Tasks w/ no Category Code** view in the **Closed Projects** folder. A blank view indicates that all tasks are coded correctly.
   b. Enter the appropriate *Category Code* for all unbaselined tasks in the field labeled *CTG*. Refer to *Appendix C: Task Category Field Standards* for valid *Category Codes*.
   c. Click on the *Refresh View* button and repeat the steps above until no tasks remain in the view.

   Contact a member of the PMO team for any questions relating to activity/task categories.

6. Validate *Task ID*s.
   a. Click on the **PM Metrics Task IDs** view in the **Closed Projects** folder.
   b. All tasks in the *Project Management* phase have *Task ID*s beginning with 0001*.
   c. Initial Planning *Task ID* is 000110.
   d. Vendor Management *Task ID* is 000125.
   e. Source System Consulting *Task ID* is 000310.
   f. All Contingency *Task ID*s are **997.

Close Issues and Complete Change Requests

The *Project Manager* is responsible for closing all project *Issues*, refer to *Section 3: Issue Management Process,* and completing all *Change Requests*, refer to *Section 4: Change Request Process*, in *Clarity* prior to *PMO* closing the project.

Issues must have a closed status, a resolution, and a resolved date. *Issues* that cannot be resolved at the *Project Manager*'s authority level need to be escalated to the appropriate authority for resolution. Escalated *Issues* typically involve resource contention, vendor relationships, inter-departmental relationships or project priority. The *Project Manager* is responsible for identifying *Issues* that require escalation; changing the *Issue* status to *"escalated"* and monitoring/tracking the status until it is resolved.

Change Requests must have appropriate signatures and the original documents filed in the *IT Administration Office*. The *Change Request* status should be approved or denied. If denied, enter an explanation for the reason the *Change Request* was denied.

Request PMO to Close the Project

Email *PMO* requesting that the project be closed in *Clarity*. *PMO* will ensure the *Close Project* process is complete and contact the *Project Manager* indicating the project has been officially closed in *Clarity*.