

Overview

IQ

Job Aid |

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

Projects should be formally closed to ensure that organizational 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 Sensei IQ

- 1. Close out remaining work
- 2. Complete key dates and deliverables
- 3. Reconcile project financials
- 4. Finalize project artifacts
- 5. Advance the project to the next stage
- 6. Produce final 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 Project IQ – 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).





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Closing a project

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

Soft	ware Contents de	fined	
	Save 🛱 Save & C	ose 🗓 Delete 🖒 Refresh 🖻 Share 🛛	🖏 Email a Link
So Ke	oftware Conter	ts defined	
Ge	eneral Related		
	Name	* Software Contents defined	
	Date	21-Jun-20	
	Description		
[Status	High risk	
		Not set	
		On track	
		At risk	
		High risk	
		Done	

3. COMPLETE DELIVERABLES

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

Deliverables for Project			B 🖉 Edit 🗎	Delete Deliverable
\checkmark Name \vee	Category \smallsetminus	Assigned To \checkmark	Due Date \checkmark	Status Reason \checkmark
Multion Certifcate	Other	Doug Brown	🔶 24-Apr-20	Not Started

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

Pr Del Ge	oject Scope Report: ^{iverable} neral Related	S				1	AA Tenant Renewal R300 Project	~
	Name *	Project Scope Reports		Category	New Capability			
	Description	Activities to complete the project scope and produce team and management reports.		Assigned To	A Bret Prinz			-
			С	Due Date			60	-
	Progress Update		D	Status	Completed			-
				•				_

Reconcile project financials

Project Manager

Project IQ – Financials

4. FINALIZE PROJECT FINANCIALS

a. 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.



Project Active	ant Renewa	al R300 sowary Product	Development	Bret Prinz	\sim		
status	Portfolio Prog	ram		Project Manag	er		
active for 4	ect months	<	Planning	E	execution (47	D)	Closing
Details	Key Dates	Deliverables	Tasks Stat	tus Updates	Issues Fi	nancials	
	🛱 Timeline	Ŧ Kev dates	Zoom —	-O Month	() Refresh	+ New Budg	iet + New
	0			0	<u> </u>		
		Veare					
		Years					Today 16 Jun
		Years Months	Feb	Mar	Apr	Мау	16 Jun Jun
~	Bud \$1.3	Years Months get 2M	Feb	Mar	Арг \$83К	Мау \$167К	Today 16 Jun Jun \$282K
~	Bud \$1.; Fore \$1.'	Years Months get 2M cast 1M	Feb	Mar	Apr \$83K \$96K	Мау \$167К \$187.5К	Jun \$282K \$224.5K
~ ~ ~	Bud \$1.1 Fore \$1.1 Act \$32	Years Months get 2M cast 1M ual 3K	Feb	Mar	Apr \$83K \$96K \$102K	May \$167K \$187.5K	Jun \$282K \$224.5K \$31K

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

Sea	irch	,	Cost	t					
	Category/Name	Date		Forecast		Actual	Fransaction Note	Budget	Varianc
	Capex			\$62,500.00		\$26,000.00		\$175,000.00	\$112,500.0
1	Hardware	10 Jun 2020 🛗	s	50000	S	20000			
1	Software	20 Jun 2020 🛗	s	12500	s	6000			
	Opex			\$162,000		\$5,000.00		\$107,000.00	-\$55,000.0
0	Labor	29 Jun 2020 🛗	s	11000	s	5000			
1	Promotional Materials	6 Jun 2020 🛗	s	15000	s				
1	Software Maintenance - Quarterly	30 Jun 2020 🛗	s	25000	s				
1	Travel and Expenses	20 Jun 2020 🛗	s	12000	s				
	Totals:			\$224,500.00		\$31,000.00		\$282,000.00	\$57,500.0

Finalize project artifacts

Project Manager

Project IQ – Issues, Risks, and Change Requests 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).

AA Ten Project	ant Renev	wal R300							Active Status	Portfolio	Cassow Program	vary Product Dev	velopment	Bret P Project
Major Proj Active for 4	ject I months	<		Plan	ining			Exe	-O	47 D)			Closi	ing
Details	Key Dates	Deliverables	Tasks	Statu	is Updates	Issues	Risks	Decisions	Chang	je Request	s Less	ons Learned	Financia	ls ···
		2			Issues for I	Project					В	🖉 Edi	it 🗊 (Delete Iss
	c) Verdue			✓ Na	me 🗸				Assigned 1	io 🗸	Status Reason	∨ Priori	ity \checkmark
		issues		A	V De	ployment	Logistics	tasks underest	imated	Albert Co	onnell	Active		Mediu

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

	Deployment Logisti	cs tasks underestimated				Pogram	AA Tenant Renewal R300 V Project	~
	General Related							
	Name	* Deployment Logistics tasks underestimated		Description	New changes in deployment to logistics team that we originally	iols are impacting the time deploymen y contracted with will no longer be ava	t will take. In addition, the liable to meet our timeline.	
	Assigned To	R, Albert Connell						
C	Status	Closed	\sim	-				
	Category	Technology	D	Resolution	Project is closed.			
	Priority	High Medium Low						
	Due Date	11-May-20						



6. CLOSE ALL OPEN RISKS

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



g. Set the **Status** to **Closed**.

E R	Developer creati	ivity to perform une	cessary development activity
0	General Related		
	Name	* Developer creativity	to perform unecessary development activity
	Assigned To	A Bret Prinz	
C	Status	Closed	~

7. CLOSE ALL OPEN CHANGE REQUESTS

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

AA Tenant Renewal R300 Project	_		Active Cassowary Production Status Portfolio Program
Major Project Active for 4 months	Planning	Execution (48 D)	c
Details Key Dates Deliverables Tasks	s Status Updates Issues Risks Decisions	Change Requests Lessons Learned Financials Dor	uments
	Change Requests for Project		🕒 🖉 Edit 🖹 Delete Cr
	✓ Name ∨	Due D ↑ ∨ Category ∨ Assigned To ∨ Price	rity 🗸 🛛 Status Reason 🗸 🗌 Project 🗸
7	Evaluate need for additional Analys	is of 🕘 13-M Schedule Steve Router	Mediu Approved AA Tenant Renewal R300
Change Requests	Automatically change the user scre	en n 🔍 26-Ju Scope Eddie Mason 🕇	High New AA Tenant Renewal R30

c. Set the **Status** to **Rejected**.

Auto	e Request	e the user screen resolution based on the resoution of the display mo	nitor.	AA Tenant Renewal I Portiolo Program Project	¹³⁰⁰ ~
Gene	ral Related				
	Name *	Automatically change the user screen resolution based on the resoution of the display monitor.	Duration Estimate	15	
1	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.	Duration Estimate Details	Overall duration is based on 60% resource availability assignment.	
	Driven By	Business	Resource Impacts	Absorb within development team	
	mplementation Date	25-Jun-20			
	Category	Scope	Impact on Other Projects	None known Projects are impacted	
	Priority	High Medium Low	Assumptions		
	Assigned To	R Eddie Mason			
1	Work Effort Estimate	72	Approved / Rejected By		
1	Work Effort Details	Each screen will modification is estimated to take 12 hours. There are 6 screens which require this CR modification	Approved / Rejected Date		
			Due Date	26-Jun-20	
-	Cost Estimate	\$11,200,00	Status	Rejected	~
(Cost Estimate Details	Based upon an hourly rate of \$150.			

Advance the project to the next stage

Project Manager

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Project IQ

8. ADVANCE THE PROJECT

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



Produce final status update

2 **Project Manager**



Project IQ - Status Updates Project IQ – Status Report

9. SET PROJECT KPI AND STATUS NARRATIVE

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

Active		Cassowary Produ	ct Development B	ret Prinz	
Natus	Portiono	Program			
lajor Pro ctive for	oject 4 months	<	Planning	Execution (47 D)	Closing
			Tesla Castrol		

- b. 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.
- c. Define the overall project status. Set the Project KPI and provide a clear and concise narrative to describe the overall status of the project.

Status			
eneral			
Status Date *	12-Jun-20		
Created By			
I Created On			
roject			
Project KPI	On Track	On Watch	Troubled
Project Status			
	Status Date • I Created By I Created Dy I Created On Opject Project KPI Project Status	Status Date 12-Jun-20 1 Created By 1 Created Dn Oject Project KPI On Track Project Status	Status Date 12-Jun-20 Created By Created On Coject Project KPI On Track On Watch Project Status



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.

	New Status Update					AA Tonant Renewal R300 Program Project				
	KPI Status									
	General			Schedule		Issues				
	Status Date	12-Jun-20		Schedule KPI	On Track On Watch Tro	cubled	Issues KPI	On Track On Watch Troubled		
	🗄 Created By		2	Schedule Status			Issues Status			
	di Created On									
	Project			Financials			Risks			
	Project KPI	On Taak On Wech Troubled		Financials KPI	On Tack On Watch Tec	cubled	Ripks KPI	On Task On Watch Toubled		
	Project Status	The project is fully staffed and entering the next phase on schedule.	1	Financials Status	***		Risks Status			
		L								
	Deliverables	or test or must be started		Work KPI	On last On West Tax	rable1	Change Requests	Onlink Onlink Indiat		
D	Deliverables Status	On lock On Welch Insulined		Work Status			Change Requests Status	LUI DALA (LUI DALADA)		

10. REVIEW AND VERIFY THE PROJECT IQ STATUS REPORT

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

0		Save	Save 8	k Close 🕂	New Projec	t 🧧 Open in	Project	🕫 Open i	n Teams 🛛 🧃	Open in SharePoint	🖔 Refresh	B Proce	ss 🗸	🔄 Share	🖾 Email a Link	🗊 Run Report 🖂	
ł	AA Te Project	enant R	enewa	I R300								_			Activ	Run on Selected Records	
N A	Major Project Active for 4 months Planning						Execution (47 D)							Closing			
	Details	Key D	ates D	eliverables	Tasks	Status Updates	Issues	Risks	Decisions	Change Requests	Lessons Lea	rned Fi	inancials	Docum	ents		

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

<	>	d O	e	100%	•	8 ~	15-lun-2020							
ProjectIQ	PROJE	CT STAT	JS REI	PORT			15 741 2020							
AA Tenant Re	AA Tenant Renewal R300													
Project Manager Bret Prinz	Bo	Sponsor Ib Melvin	Current Sta Executio	ge n		% Complete 9%								
Project status														
Project KPI	3	Schedule		Risks			Issues							
A		•		٠			•							
Change Requests	D	eliverables		Financial	5		Work							
•		•		•										
Status Utere 07-Uni-2220 Our biggest challenge is the del Internal work as a result. We have	ayed sign-of ve verbal app	f on funding. Th provals, but now	is is delayin just need ti	g our vendors ie signed pap	on-boa erwork	rding and al:	so pushing the							
Project Dates & Wo	ork													
Start Date		1	arget Finish			Scheduled Finish								
06-Apr-2020		04-	Dec-20	20		27-Aug-2021								
Total Effort		Effc	rt Complete	d		Effort Remaining								
9,914			1,292			8,622								
Hours			Hours			Hours								



11. REVIEW AND VERIFY THE INSIGHTS STATUS REPORT

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a. Right mouse click on the current project and click Drill through and then select Project Status.



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

© Project	Status: Email campaign	to increase	e rider's aware	eness 🕒	OVERVIEW DETAILS TRACKING
Project KPI	Project Link Project Manager Start Finish	Changes Deliveral	oles Financials Issues	Risks Sch	edule Work
Iroubled	 P = conne campagin interez interez 	· <u> </u>		• • • •	
Scheduled Finish	Current Project Status 03-Ma		Previous Project Status	20-Dec-19	% Complete
19-Aug-20	This project is significantly behind. Our sponsor has requested a meeting next week to review and revise the timeline.				
Target Finish					23%
19-Aug-20				0%	100%
Late Tasks	Completed Milestones		Up	coming Milestones	
	KPI Milestone	Finish	KPI Milestone		Planned Finish
۷	Email campaign defined	09-Apr-20	O Campaign launched		19-Aug-20
Overdue Tasks					
7					
Effort Completed					
536					
Hours					
Effort Remaining					
1,512					
Hours					

Harvest Lessons Learned

👗 🛛 Project Manager



Project IQ – Lessons Learned Project IQ – Deliverables

12. HARVEST LESSONS LEARNED

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

	AA Tenant Rener	wal R300										Active Status	Portfolio	Cassowary P Program	roduct Develo	opment	Bret Prinz Project Manager
	Major Project Active for 4 months	<		Pla	nning				Executi	on (48 D)					Closing		
	Details Key Dates	Deliverables	Tasks	Status Updates	Issues	Risks	Decisions	Change Requests	Lessons Learned	Financials	Documents						
	Lessons Learned for	Project									l	Edit 🛞	Delete Les	son	년 Share	CE EI	mail a Link
	✓ Name ↑ ∨							Category \checkmark				Status Rea	ion \vee				
A	Brecutive star	ff often loses inter	est in proj	ects which are not r	outinely st	stused		Stakeholder	Engagement			New					

13. HARVEST REUSABLE OR SAMPLE DOCUMENTS

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