

[previous](#) [Home](#) [next](#)

4.07 Modify Project State

When the project is completely planned and ordered, it must be activated. This can be done by using the action “set project status”. This action changes the status of the complete project structure (including all the sub-projects).

Project 3 Introduction Projectile

Document Edit View Back references Actions

Master data Involved persons Portfolio Status Budget Financial data Order data Documentation Misc

Project number Number 3 Status Open

Description Introduction Projectile

Project start/end date From 16.10.2009 To 30.10.2009

Parent project

Subprojects

Number	Description	Status	Begin planning	End planning
1 3.1	Introduction Accounting	Open	09.06.2009	30.11.2009

Processes

Process number	Description	Begin date planning	End date planning
1 3-1	Conception for combining Projectile and SAP CO/FI	09.06.2009	30.10.2009
2 3-2	Installation Projectile	09.06.2009	30.10.2009
3 3-3	Programming 4-3	09.06.2009	30.10.2009

This action can also be used for individual sub-projects, for example if only one particular project is assigned.

Project 3 Introduction Projectile

Document Edit View Back references Actions

Master data Involved persons Portfolio Status Budget Financial data Order data Documentation Misc

Project number Number 3 Status Open

Description Introduction Projectile

Project start/end date From 16.10.2009 To 30.10.2009

Subprojects

Number	Description	Status	Begin planning	End planning
1 3.1	Introduction Accounting	Open	09.06.2009	30.11.2009

Processes

Process number	Description	Begin date planning	End date planning
1 3-1	Conception for combining Projectile and SAP CO/FI	09.06.2009	30.10.2009
2 3-2	Installation Projectile	09.06.2009	30.10.2009
3 3-3	Programming 4-3	09.06.2009	30.10.2009

Actions

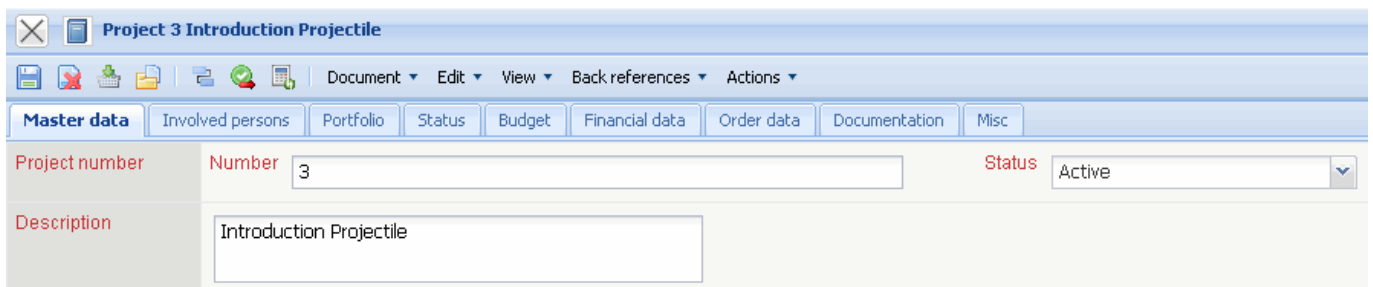
- Planning
- Workflow
- Occupations_Rates
- Offers_Billing
- Manage
- CreateOrder
- 04 - Set project activity

The action sets ...



The 'Set Activity' dialog box is shown. It has a title bar with a close button and a green checkmark icon. The main area is divided into two sections. The first section, 'Current project state', has a text label and a button labeled 'Open'. The second section, 'Change state to', has a list of status options with arrows pointing to them: 'BeingPlanned', 'ResourceClearance', 'Active' (highlighted with a yellow background and a mouse cursor), 'Advance', 'Closed cancel', 'Closed hold', 'Closed live', and 'Archived'. At the bottom right of the dialog is a 'Cancel' button.

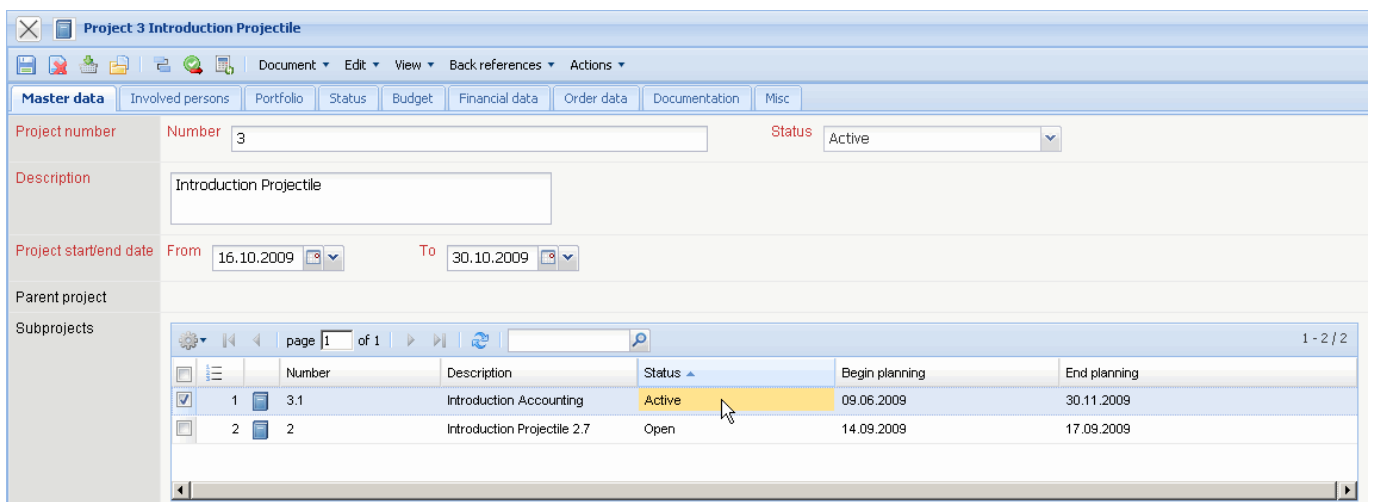
...the project status to “active” and...



The 'Project 3 Introduction Projectile' form is shown. It has a title bar with a close button and a document icon. Below the title bar is a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu bar is a tab bar with 'Master data', 'Involved persons', 'Portfolio', 'Status', 'Budget', 'Financial data', 'Order data', 'Documentation', and 'Misc'. The 'Master data' tab is selected. The form has two main sections. The first section, 'Project number', has a text label, a text input field containing '3', and a 'Status' dropdown menu set to 'Active'. The second section, 'Description', has a text label and a text input field containing 'Introduction Projectile'.

...from now time and costs on the project can be entered and recorded.

The complete project is now active, but the second sub-project's realisation is still in the status “open offer” (that means it is not released for recording).



The 'Project 3 Introduction Projectile' form is shown, displaying the 'Subprojects' table. The form has a title bar with a close button and a document icon. Below the title bar is a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu bar is a tab bar with 'Master data', 'Involved persons', 'Portfolio', 'Status', 'Budget', 'Financial data', 'Order data', 'Documentation', and 'Misc'. The 'Master data' tab is selected. The form has two main sections. The first section, 'Project number', has a text label, a text input field containing '3', and a 'Status' dropdown menu set to 'Active'. The second section, 'Description', has a text label and a text input field containing 'Introduction Projectile'. The third section, 'Project start/end date', has a text label, a 'From' date input field containing '16.10.2009', and a 'To' date input field containing '30.10.2009'. The fourth section, 'Parent project', has a text label and a text input field. The fifth section, 'Subprojects', has a text label and a table. The table has columns: 'Number', 'Description', 'Status', 'Begin planning', and 'End planning'. The table contains two rows. The first row has a checked checkbox, the number '1', the description '3.1 Introduction Accounting', the status 'Active', the date '09.06.2009', and the date '30.11.2009'. The second row has an unchecked checkbox, the number '2', the description 'Introduction Projectile 2.7', the status 'Open', the date '14.09.2009', and the date '17.09.2009'.

By using the action “set project status” further status changes can be applied for the project.

After a project or a sub-project is completely finalized (for example by response of all the tasks/jobs for the project and for the achievement of the milestone goals) the status closed should be used.

Note: By setting “status completed” all the running tasks/jobs are closed!

Note: Every completed project shall be marked on time with the appropriate status, otherwise the status information in the status information in the chart system will not be up to date.

From:
<https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_4:4.07_projektstatus_aendern&rev=1256721547

Last update: **2019/10/25 14:09**

