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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

Actions

- Planning
- Workflow
- Occupations_Rates
- Offers_Billing
- Manage
- CreateOrder

04 - Set project activity

The action sets ...

Set Activity

Current project state: Open

Change state to:

- BeingPlanned
- ResourceClearance
- Active
- Advance
- Closed cancel
- Closed hold
- Closed live
- Archived

Cancel

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

Project 3 Introduction Projectile

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

Project number: Number 3 Status: Active

Description: 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).

Project 3 Introduction Projectile

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

Project number: Number 3 Status: Active

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	Active	09.06.2009	30.11.2009
☐	2	2 Introduction Projectile 2.7	Open	14.09.2009	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.

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