



Project States

Quick Reference Guide

Project States

Once a **Project** is created, State defaults to Pending. As you execute the project, the State will update with the following values listed below:



Pending is used to identify a project that has been created, but no prep work has yet started.

Active indicates work on the project has started. Once a task has a % Complete value, Time is logged for a task, or the task State is changed to Work in Progress, this State is automatically set.

On Hold indicates Project has been put on hold and no work is progressing.

Closed Complete indicates that the project was completed and is now closed. No additional work is being done, and no time will be booked against the project.

Closed Cancel indicates that the project was not completed. Could indicate the project was no longer a viable candidate or no longer needed.

Project Task State Roll Up & Roll Down

Some project task states roll up when you have parent and child task relationships:

- When the state of the child task is manually changed to **Work in Progress** or **Closed** the parent state is updated.
- **Pending** and **Open** do not roll up to the parent task.

Project tasks can also roll down:

- If you change the state of a Project to **Closed**, all tasks under it change to the default closed value (Closed Complete).

Note:

- Closed Projects can no longer be re-opened at the project level. You must open a project task or create a new task with an Open, Pending or Work in Progress state.
- Parent tasks (tasks with child tasks under it) are read-only and the state can not be modified directly. You must change the states of the child tasks.