

White paper

Project status, task status, and project stages

How to handle project managers' workflows in TimeLog
Project for order processing, indicating status and stages.

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Introduction

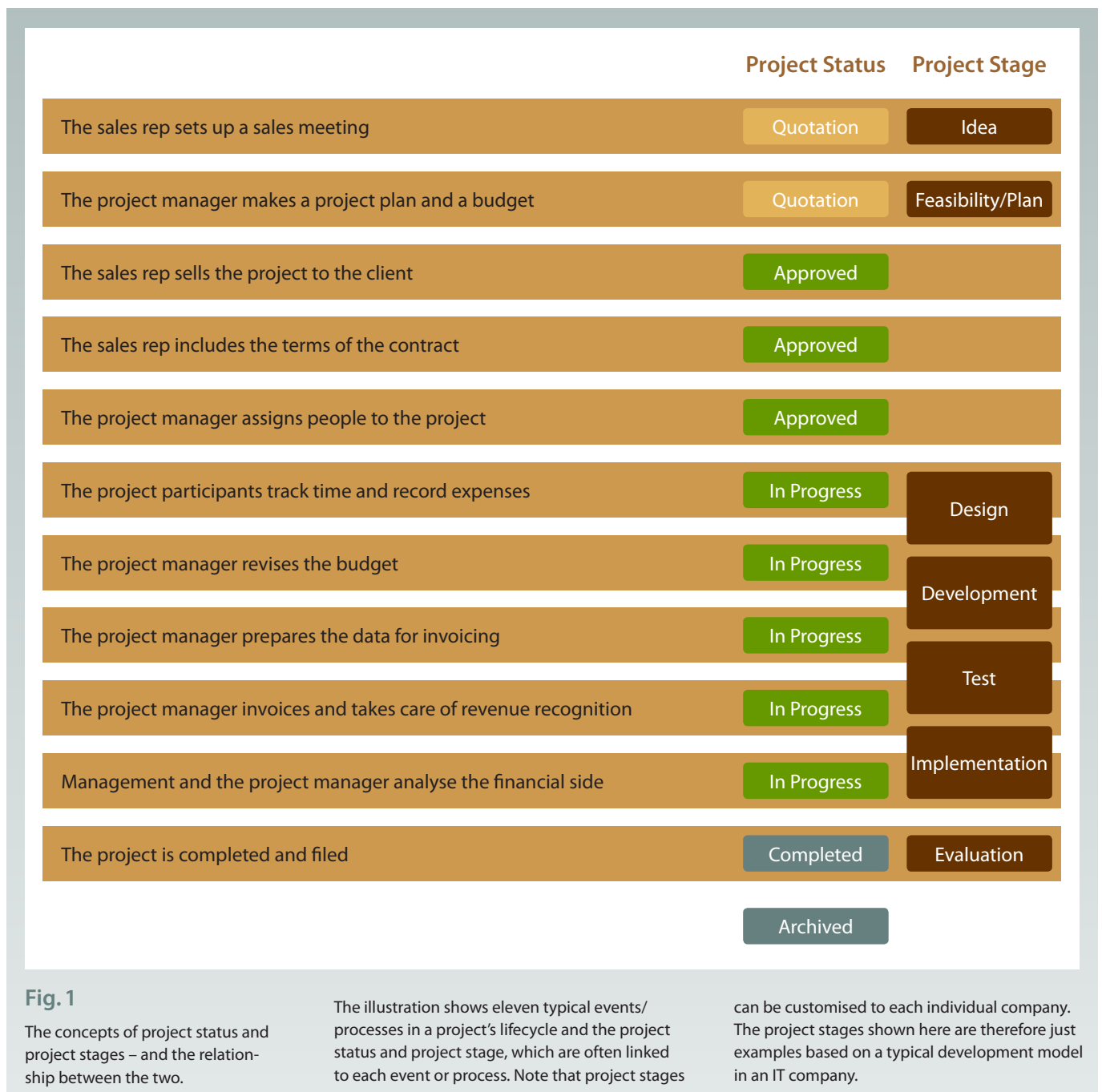
This document describes TimeLog Project's functionality concerning status and stages, as indicated on projects and tasks. The document is intended for project managers who wish to manage workflows around the settlement of orders in TimeLog Project.

Note

Field and function names and screen shots are based on TimeLog Project 5.4, as it appeared when this document was written, and can therefore deviate in name and appearance from the current version of TimeLog Project.

Project status and project stages

Project status and project stages are used concurrently to keep track of project progress and status, in relation to order processing for the client, and the processes or gates that the projects go through internally, within the company. Project status and project stage are indicated independently of each other on each project, but there will often be a connection between the project's current project status and project stage. For example, a project will typically have the project status *In progress* before the project enters a stage such as *Design*.



Project Status

What is the project status?

Using the project status, it is possible to specify the project's order and delivery-related progress in relation to the customer. This means that you can indicate whether the project is in the quotation stage, if the offer is approved, the work commenced, completed, etc.

The primary purpose of indicating project status is

1. to clarify where the project is in the delivery process.
2. to make it possible to search for (or filter) projects based on their location in the delivery process.
3. to provide an easy management of access to time registration in relation to the project's location in the delivery process.

In TimeLog Project's reports, the project status is used as a filter, so that you can focus on projects with a specific status.

Each status also affects whether time and expenses can be registered to the project. This makes it easy to remove the project from the employees' weekly timesheets if the project is either paused or completed.

The individual tasks in a project have an additional status that, in some cases, is affected by the status change. For example, if all tasks' status are changed to *Completed* when the project is about to be completed, the termination process becomes quick and easy.

Status Change

Change the status of a project by selecting the appropriate status and clicking *Save*.

Each time the project status is updated, the time of change is logged, as well as the name of the person that changed the status. This makes it possible to see when a project is, as an example, approved, or set in progress.

If you update the status to a status that "leapfrogs" over another status, such as changing the status from *Quotation* to *Completed*, the date is also entered for the stages in between. This means that if a project goes from *Approved* to *Completed*, the date is filled in automatically for the status *In progress*. The project instantly goes through all statuses in between.

Fig. 2

The current status is displayed and can be altered in the *Project Status* field.

Clicking on the button next to the field displays a window where you can edit the dates of each change of status.

The screenshot shows the TimeLog Project Status interface. The main window displays the 'Project Status' field set to 'IN PROGRESS'. Below this, there are fields for 'Time Tracking' (ON) and 'Project Factor' (0,0). The 'Handled by' section shows the Department as 'Professional Services', Project Manager as 'RKD (Reginald K. Dwight)', and Account Manager as 'RKD (Reginald K. Dwight)'. The 'Progress' section shows the Project Status as 'In progress (13-07-2012)' and Project Stage as 'Execution'. The 'Log' section shows a list of status changes with dates and icons for editing. An 'Edit project status' dialog box is open, showing a list of status changes with dates and icons for editing. The dialog box has a 'Show log' button and 'Save' and 'Cancel' buttons at the bottom.

If you set the project's status back to an earlier status, the date stamp is removed for all the statuses that take place after the new, current status. If the project goes, for example, from *In progress* to *Quotation*, the date stamp is wiped out from the *In progress*, and *Approved* status. When you click the button next to the project status box, the dates displayed indicate when the project was switched to a specific status. The dates can be edited, so that even if the project status was changed at a later time, you can change the date to the time when the status was actually changed.

Options in Project Status

A project order-/delivery process may consist of the following steps, all of which are reflected in a status in TimeLog Project. It is not necessarily all steps, however, that are included in each project's progress.

Quotation

If the project is set to the *Quotation* status, it means that the project has not begun, but that an offer is being prepared, or has been sent to the customer and has not yet been accepted. When the project has this status, the *Enable time tracking* field can be used to indicate whether time can be registered to the project. By allowing the project to have a quotation status with time recording deactivated, a complete project can be set up with a payment plan and tasks, and even allocate employees without the project's stages appearing in the employees' time tracking interfaces. If you want to allow time registration during the quotation because, for example, the time during the quotation phase is billable, you can apply the quotation status with time registration activated.

In TimeLog Project's resource planner, you can choose whether quotation projects should be shown so that you can forecast workload with or without projects that are in the quotation phase. If, under System Administration, you've activated the ability to enter a forecast, you can also indicate a likelihood ratio of the project so that the work load is adjusted according to the likelihood that the project becomes real.

Approved

This status has the same function as the *Quotation* status, but is used when the offer is accepted by the customer and the work has not yet started.

In progress

If the project set to project status *In progress*, this means that the project is being executed, and therefore, time and expenses can be registered on it.

On hold

If the project's status is set to *On hold*, it means that the project has begun and is not completed, but that there is currently no active effort on it.

When the project has this status, time and expenses can be registered on it, and the project and its tasks are hidden from all the places that time registration occurs.

When a project changes its status to *On hold*, the individual tasks retain their current status. It is also only necessary to change the project status back to *In progress* again to allow for time registration for the tasks where time could be recorded before the project was paused.

Completed

Completed means that work on the project is finished, and that time and expenses can no longer be registered on it.

When the project's status is changed to *Completed*, the status of individual tasks are automatically changed to *Completed* as well.

Archive

If the project status is set to *Archive*, it means that the project is complete, and fully processed.

Important

Without the extension TimeLog EVM, an automatic revenue recognition occurs at the completion of tasks that are settled by a fixed price.

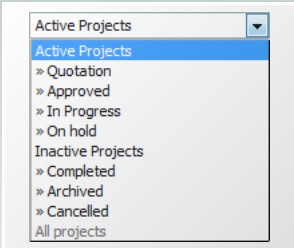
This automatic revenue recognition process and the situations that cause automatic revenue recognition are further detailed in the document [Automatic income recognition in TimeLog Project](#).

Important

An archived project is also considered to be completed. If the project goes from an active status to being archived, an automatic revenue recognition can also occur in the same way as when a project is set to a *Completed* status.

Fig. 3

In TimeLog Project's reports, you can filter by the individual project status or by an overall status such as *Active projects*.



In this way, you can distinguish between projects where project work is completed, but yet to be finalized, and projects that are completely finished.

Archived projects will not be included in reports without project status filter.

Cancelled

This status is used when the project is stopped before completion. For example, the project may be stopped before completion, because proceeding with it is not considered viable.

Cancellation of a project does not give rise to automatic revenue recognition.

Billable time records on tasks settled on a Time & Material basis remain billable and can thus be finalised or rendered non-chargeable in the invoice module. Instalments at a fixed price are hidden from the invoice module.

Filters

In a series of TimeLog Project's reports, it is possible to limit the report's contents according to project status. The reports allow you to choose a specific status such as *In progress* or *On hold*, thereby only showing projects that have the selected status.

It is also possible to choose a general status, such as *Active projects* and *Inactive projects*. Each of these options covers one or more project statuses, and if you choose, for example, *Inactive projects*, the report will include projects with statuses that are covered by this option.

The following table lists the statuses that are covered respectively by active and inactive projects when filtering by an overall project status.

Filter option	Includes project status types
Active projects	Quotation Approved In progress On hold
Inactive projects	Completed Archived Cancelled
All projects	All types of project status

Task status

What is task status

Using task status, it is possible to indicate a task's progress. This means that you can indicate whether a task has not yet started, if it is actively being worked on, whether it is temporarily set on hold, or if it is completed.

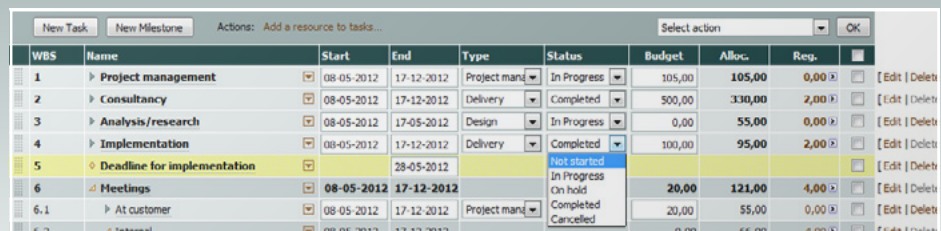
Task status is primarily designed to permit the supervisor to easily allow or block time registration on the project, and also from a project-related perspective, to keep track of which activities are started, which are completed, etc. In some reports the task status is used as a filter, so you can focus on tasks with a specific status.

Each status indication has an impact on whether time can be recorded on the task. Additionally, a status indication has an influence on the revenue recognition of the work on fixed price tasks, if you do not use the extension TimeLog EVM. Read more about this in the section about the *Completed* status.

The project's status, in some cases, affects the status of all tasks. When the project status changes to *Completed* or *Archived*, the status of all project tasks is set to *Completed*, except for the tasks that have been canceled.

Fig. 4

The *Status* field indicates the status of each task.



WBS	Name	Start	End	Type	Status	Budget	Alloc.	Reg.	
1	Project management	08-05-2012	17-12-2012	Project man	In Progress	105,00	105,00	0,00	[Edit] [Delete]
2	Consultancy	08-05-2012	17-12-2012	Delivery	Completed	500,00	330,00	2,00	[Edit] [Delete]
3	Analysis/research	08-05-2012	17-05-2012	Design	In Progress	0,00	55,00	0,00	[Edit] [Delete]
4	Implementation	08-05-2012	17-12-2012	Delivery	Completed	100,00	95,00	2,00	[Edit] [Delete]
5	Deadline for implementation		28-05-2012		Not started				[Edit] [Delete]
6	Meetings	08-05-2012	17-12-2012		In Progress	20,00	121,00	4,00	[Edit] [Delete]
6.1	At customer	08-05-2012	17-12-2012	Project man	On hold	20,00	55,00	0,00	[Edit] [Delete]
6.2	Technical	08-05-2012	17-12-2012		Completed	0,00	66,00	0,00	[Edit] [Delete]
					Cancelled				

Options in Task status

Not started

If a task has the status of *Not Started*, it means that work on the task is not underway. When the task has this status, it is not possible to record time on the task, and the task is hidden in the places where you can register time. By letting the task have this status, it is possible to create the complete project with all the tasks to be used, and allocate staff, without the task appearing in the employees' hourly and weekly timesheets before it becomes relevant.

In progress

If the task has the status *In progress*, it means that the task is actively being worked on, and therefore can have time recorded on it.

On hold

If a task has the status *On hold*, this means that task has begun and is not finished, but that it is currently not being actively worked on.

When a task has this status, time cannot be registered to it, and the task is hidden at all the locations where time registration occurs.

In the *Project Status* field of the project's main information, it is also possible to put the whole project on hold. If the project gets a hold status, the current status of each task is retained. This means that although the project is paused, the individual tasks are not paused. In this way, the project can be quickly restarted, without the individual tasks' status returning to their former status.

Completed

If a task's status is set to *Completed*, it means that work on the task has been completed, and that time can no longer be registered to the task.

If you are not using the extension TimeLog EVM, it can cause automatic revenue recognition when a task that is settled by fixed price has its status changed to *Completed*. For a more detailed description of what is booked as revenue and the conditions for revenue recognition, see white paper document [Automatic revenue recognition in TimeLog Project](#). Changing the status of a subsequent task in which there was an automatic revenue recognition site at the task's completion will cancel this revenue recognition.

Cancelled

This status is used when the task is stopped without being completed. This could be because the task is stopped before completion because it is not deemed profitable to proceed with. Cancellation of a task does not cause any automatic revenue recognition. Billable time registrations on canceled tasks that are calculated by time spent, remain billable and can thus be finalized in the invoice module. Rates on fixed-price are hidden, however, from the invoice module.

Project Stages

What are project stages

Project stages are used to manage a project's internal lifecycle. If the company's projects each go through the established process or administrative processes, the project stages can be used to indicate where the project is in the process.

Fig. 5

The project stage is chosen under the project's main information in the *Progress* field.

STEELHENG (P12.05.0017)

ses [Search (F2) | Personal Profile | Product News | Help (F1) | Log Out]

Main Menu → Project Administration → Search Project(s) → Steelhenge (P12.05.0017)

SETTINGS PROJECT PLAN RESOURCE GROUP FINANCES DOCUMENTS STATUS

Edit Project

Name: Steelhenge
No.: P12.05.0017

Project Status IN PROGRESS
Time Tracking ON
Project Factor 0,0

Actions
New project
Save as project template...

Ordered by
Customer: SpeedUp Consultants
Department: Select department
Contact: Select contact
P.O. No.:

Handled by
Department: Professional Services
Project Manager: RND (Reginald K. Dvnight)
Account Manager: RND (Reginald K. Dvnight)

Actions
New Customer
Extranet Administration

Schedule
Start date: 08-05-2012
End date: 16-12-2012

Progress
Project Status: In progress (13-07-2012)
Project Stage: Select project stage
Select project stage
Idea
Execution
Delivery
Completed
Time tracking: ☒ Enable time tracking

Log
Created: 08-05-2012 by ses
Updated: 13-07-2012 by ses

Shortcuts
Edit project types
Edit project categories
Edit Hourly Rates

Properties
Project Type: Development tasks
Project Category: EU project
Description: [Edit]

Project stages differ from project status by where the project status reflects progress in relation to the customer's order, and is used to easily manage when time can be registered, the project stages represent the internal treatment of the project. A project, can, for example, have the project status of *Completed*, thus indicating that the delivery has occurred, while several project stages can still be missing (such as invoicing and final evaluation) before the administrative work is completed.

Project stages can also be used to get an overview of the resources allocated and the resource needs for projects that are in consideration to be started.

Example

A company uses the following stages: *Idea*, *Planning*, *Ready for execution*, *Execution*, *Delivered*, and *Completed*. Projects that have not yet started, but which you are considering starting, are added to the *Idea* stage. Projects where work has started but is not yet finished are placed in the *Execution* stage. When they are finished, they change to *Delivered*, and when the invoicing and final evaluation has occurred, the stage is changed to *Completed*.

Once the company has available resources, the *Project portfolio* report is used to create a list of projects in the idea stage. This gives you an overview of the budgets of the projects that can be started, and can assess which projects are consistent with the available resources.

Similarly, one can easily create a list of projects that have been marked as delivered, and therefore should be invoiced and have a final evaluation.

Setup

In the *System Administration* > *Project Settings* window, choose if the project stages are to be implemented.

Fig. 6

Project stages are activated by ticking the box in the *Project stages* field.

The screenshot shows the 'PROJECT CONFIGURATION' window with the following sections:

- Process support:** Scheduling, Budgeting, Invoicing (all with 'ON' buttons).
- Project features:** Baseline, Milestones, Project stages (checked), Project factor, Project forecast, Documents, Status reports.
- Task features:** WBS number (checked).
- Scheduling:** Description of the feature group.
- Budgeting:** Description of the feature group.
- Invoicing:** Description of the feature group.
- Project dimensions:** Project types, Make it required (checked), Project categories, Make it required (unchecked).
- Task dimensions:** Task types (checked).
- Project fields:** Contact, P.O. No., Account manager, Partner, Description, Link (all checked).
- Task fields:** Description (checked).
- Shortcuts:** Search Project(s), New Project, New Project Type, New Task Type, Project Factor - Settings.

The individual project stages are then set up in *System administration* > *Project stages*. Here, indicate a name and a sorting for each project stage that determines the stage's placement in a series of stages.

Fig. 7

Setting up project stages.

The screenshot shows the 'PROJECT STAGES' window with a table of project stages:

Name	Sorting	Active
Idea	10	X [Edit] [Delete]
Planning	20	X [Edit] [Delete]
Execution	30	X [Edit] [Delete]
Delivery	40	X [Edit] [Delete]
Evaluation	50	X [Edit] [Delete]
Completed	60	X [Edit] [Delete]

Buttons: New Project Stage, Reset project model.

Function

If you are using project stages, at the start of a project, a project stage should be indicated in the *Project Stage* field.

The stage can be continuously changed by selecting the appropriate state and clicking *Update*. Each time the project changes stages, TimeLog Project logs the time of the change, as well as who made the change.

If you update the status to a status that "leapfrogs" over another status, such as changing the status from *Idea* to *Completed*, the date is also entered for the stages in between.

If you set the project's status back to an earlier status, the date stamp is removed for all the statuses that take place after the new, current status. If the project goes, for example, from *Execution* to *Idea*, the date stamp is wiped out from the *Execution*, and *Planning* status.

When you click the button next to the project status box, the dates displayed indicate when the project was switched to a specific status. The dates can be edited, so that even if the project status was changed at a later time, you can change the date to the time when the status was actually changed.

Filters

In a series of TimeLog Project's reports, it is possible to limit the report's contents so that only projects with a specific project status are included. This is especially important in reports that display project lists – such as *Search for projects* and *Project Portfolio*.