

Project Status Overview

A project has two statuses: **Project Status** and **Processing Status**. The **Project Status** is updated by the user over the life of the project. The **Processing Status** automatically changes as the **Project Status** is updated. There are three values for the **Processing Status**: **Pending**, **Active**, and **Inactive**. The combination of the **Project Status** and the **Processing Status** determines whether a project value is available to be used on budget and expenditure transactions. The table below details the correlation between the **Project Status**, **Processing Status**, and **Transaction Entry**.

Scenario	Project Status	Processing Status	Transaction Entry
Upon creation of a project, the Project Status defaults to Pending .	Pending	Pending	The project value is not available for selection when entering budget or expenditure transactions (i.e., transactions cannot be entered when the Project Status is Pending).
The Project Status is updated to Budget .	Budget	Active	The project value is available to use on transactions. However, the system will only allow budget transactions to be recorded to the project when the Project Status is Budget .
In order to record actual transactions, the status of a project must be Open .	Open	Active	The project value is available for selection when entering budget and expenditure transactions. Any transaction can be recorded when the Project Status is Open .
To prevent charges to a project without closing the project, place it in a Hold status.	Hold	Active	The project value appears to be available for use on transactions. However, the system will not allow budget or expenditure transactions to be entered when the Project Status is Hold .
When a project is complete, the status of the project should be updated to Closed .	Closed	Inactive	The project value is not available to use on transactions. Transactions cannot be entered when the Project Status is Closed .