

What's new in Planview Portfolios – Sept. 15, 2025, upgrade to August 2025 release



Change to the way Planview Portfolios handles "actuals" when **Work Status** is changed to **Completed** or **Cancelled**

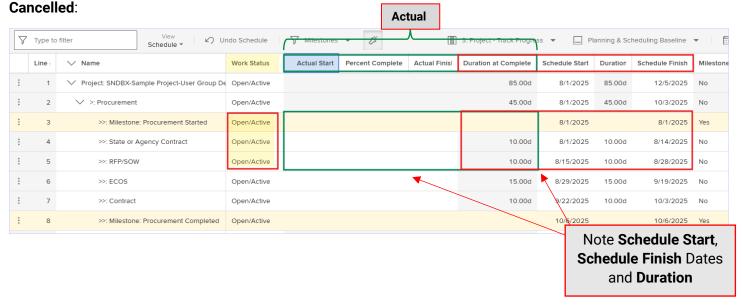
Planview Portfolios has made a change in how the status of its Project Plan is processed. The change will be noticed when the **Work Status** of a task/milestone is changed to **Complete** or **Cancelled** when the actuals are not first entered. This change will be effective beginning **Monday**, **September 15**, **2025**.

Before upgrade:

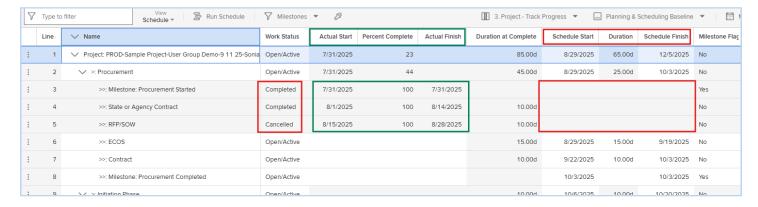
Prior to the upgrade, when **Work Status** was changed on a task or milestone (without first updating the **Actual Start**, **Actual Finish**, or **Percent Complete**) was changed to **Complete** or **Cancelled**, the **Actual Start** and **Actual Finish** were populated with the dates from the **Schedule Start** and **Schedule Finish** and the **Percent Complete** is set to 100%.

Example below:

Note the Schedule Start, Schedule Finish and Duration before changing the Work Status to Completed or



After changing the **Work Status** to **Completed** or **Cancelled**, Planview moved the information from the **Schedule Start**, **Schedule Finish** and **Duration** to the **Actual Start**, **Actual Finish** and **Duration at Complete**, and updated **Percent Complete** to 100%:

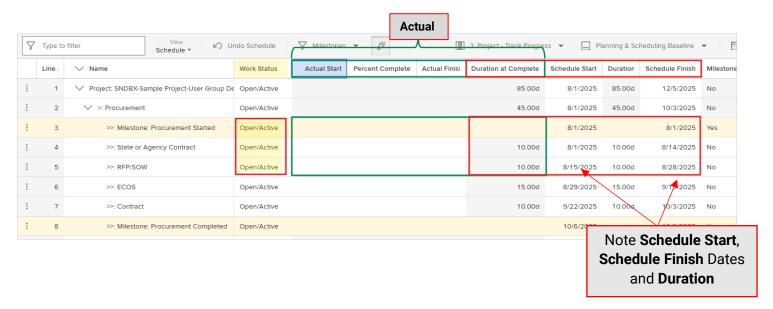


After upgrade:

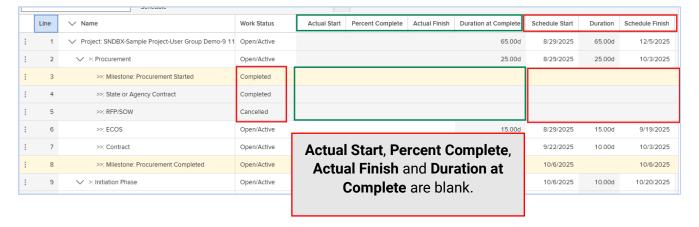
Beginning Monday, September 15, 2025, using the same schedule as above, Planview will no longer automatically populate the actuals.

Example below:

Note the **Schedule Start**, **Schedule Finish** and **Duration** before changing the **Work Status** to **Completed** or **Cancelled**:



Notice the difference in **Actual Start**, **Percent Complete**, **Actual Finish** and **Duration at Complete** when the **Work Status** is changed to **Completed** or **Cancelled**.



Recommended approach:

The **Actual Start, Percent Complete** and **Actual Finish** columns should be completed **before** changing the **Work Status** to **Completed**.

For **Cancelled** tasks/milestones, these fields can be left blank unless some work was completed before the task was cancelled.

- 1. View the 3. Project Track Progress column set.
- 2. Update the Actual Start, Percent Complete and Actual Finish
 - a. Actual Start and Percent Complete can be updated as the work is completed on the task.
 - b. Then, once the task is finished, update the **Actual Finish** date. **Percent Complete** will be set to **100%** and the **Work Status** will be changed to **Assumed Complete**.
- 3. To lock the task so that it cannot be edited, click in the **Work Status** field of the task/milestone and change the **Work Status** to **Completed**.

