



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 **Cancelled**:

Actual

Line	Name	Work Status	Actual Start	Percent Complete	Actual Finish	Duration at Complete	Schedule Start	Duration	Schedule Finish	Milestone
1	Project: SNDBX-Sample Project-User Group De	Open/Active				85.00d	8/1/2025	85.00d	12/5/2025	No
2	>: Procurement	Open/Active				45.00d	8/1/2025	45.00d	10/3/2025	No
3	>>: Milestone: Procurement Started	Open/Active					8/1/2025		8/1/2025	Yes
4	>>: State or Agency Contract	Open/Active				10.00d	8/1/2025	10.00d	8/14/2025	No
5	>>: RFP/SOW	Open/Active				10.00d	8/15/2025	10.00d	8/28/2025	No
6	>>: ECOS	Open/Active				15.00d	8/29/2025	15.00d	9/19/2025	No
7	>>: Contract	Open/Active				10.00d	9/22/2025	10.00d	10/3/2025	No
8	>>: Milestone: Procurement Completed	Open/Active					10/6/2025		10/6/2025	Yes

Note Schedule Start, Schedule Finish Dates and Duration

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%:

Line	Name	Work Status	Actual Start	Percent Complete	Actual Finish	Duration at Complete	Schedule Start	Duration	Schedule Finish	Milestone Flag
1	Project: PROD-Sample Project-User Group Demo-9 11 25-Sonia	Open/Active	7/31/2025	23		85.00d	8/29/2025	65.00d	12/5/2025	No
2	>> Procurement	Open/Active	7/31/2025	44		45.00d	8/29/2025	25.00d	10/3/2025	No
3	>>> Milestone: Procurement Started	Completed	7/31/2025	100	7/31/2025					Yes
4	>>> State or Agency Contract	Completed	8/1/2025	100	8/14/2025	10.00d				No
5	>>> RFP/SOW	Cancelled	8/15/2025	100	8/28/2025	10.00d				No
6	>>> ECOS	Open/Active				15.00d	8/29/2025	15.00d	9/19/2025	No
7	>>> Contract	Open/Active				10.00d	9/22/2025	10.00d	10/3/2025	No
8	>>> Milestone: Procurement Completed	Open/Active					10/3/2025		10/3/2025	Yes
9	>>> Initiation Phase	Open/Active				10.00d	10/6/2025	10.00d	10/20/2025	No

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**:

Line	Name	Work Status	Actual Start	Percent Complete	Actual Finish	Duration at Complete	Schedule Start	Duration	Schedule Finish	Milestone
1	Project: SNDBX-Sample Project-User Group De	Open/Active				85.00d	8/1/2025	85.00d	12/5/2025	No
2	>> Procurement	Open/Active				45.00d	8/1/2025	45.00d	10/3/2025	No
3	>>> Milestone: Procurement Started	Open/Active					8/1/2025		8/1/2025	Yes
4	>>> State or Agency Contract	Open/Active				10.00d	8/1/2025	10.00d	8/14/2025	No
5	>>> RFP/SOW	Open/Active				10.00d	8/15/2025	10.00d	8/28/2025	No
6	>>> ECOS	Open/Active				15.00d	8/29/2025	15.00d	9/19/2025	No
7	>>> Contract	Open/Active				10.00d	9/22/2025	10.00d	10/3/2025	No
8	>>> Milestone: Procurement Completed	Open/Active					10/6/2025		10/6/2025	Yes

Note **Schedule Start**,
Schedule Finish Dates
and **Duration**

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

Line	Name	Work Status	Actual Start	Percent Complete	Actual Finish	Duration at Complete	Schedule Start	Duration	Schedule Finish
1	Project: SNDBX-Sample Project-User Group Demo-9 11	Open/Active				65.00d	8/29/2025	65.00d	12/5/2025
2	>: Procurement	Open/Active				25.00d	8/29/2025	25.00d	10/3/2025
3	>>: Milestone: Procurement Started	Completed							
4	>>: State or Agency Contract	Completed							
5	>>: RFP/SOW	Cancelled							
6	>>: ECOS	Open/Active				15.00d	8/29/2025	15.00d	9/19/2025
7	>>: Contract	Open/Active					9/22/2025	10.00d	10/3/2025
8	>>: Milestone: Procurement Completed	Open/Active					10/6/2025		10/6/2025
9	>: Initiation Phase	Open/Active					10/6/2025	10.00d	10/20/2025

Actual Start, Percent Complete, Actual Finish and Duration at Complete are blank.

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**.

Line	Name	Work Status	Actual Start	Percent Complete	Actual Finish	Duration at Complete	Schedule Start	Duration	Schedule Finish	Milestone
1	Project: SNDBX-Sample Project-User Group Demo-9 11	Open/Active	8/1/2025	15		85.00d	8/15/2025	75.00d	12/5/2025	No
2	>: Procurement	Open/Active	8/1/2025	29		45.00d	8/15/2025	35.00d	10/3/2025	No
3	>>: Milestone: Procurement Started	Completed	8/1/2025	100	8/1/2025					Yes
4	>>: State or Agency Contract	Assumed Complete	8/1/2025	100	8/11/2025	7.00d				No
5	>>: RFP/SOW	Open/Active	8/12/2025	50		13.00d	8/15/2025	10.00d	8/28/2025	No
6	>>: ECOS	Open/Active	8/18/2025	10		24.00d	8/29/2025	15.00d	9/19/2025	No
7	>>: Contract	Open/Active				10.00d	9/22/2025	10.00d	10/3/2025	No
8	>>: Milestone: Procurement Completed	Open/Active					10/6/2025		10/6/2025	Yes
9	>: Initiation Phase	Open/Active					10/6/2025	10.00d	10/20/2025	No