

Project management statuses

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Project management statuses are the named values used to identify the current position of project-management work. Maintain them from the **PM statuses** list in the Project management configuration area.

The **PM statuses** page contains nine rows. Use the status list when you need to review the available names or maintain a status value.

If you need to...	Go to
Reach the list	Find the status list
Understand the visible field and form	Understand the status screen
Add, edit, or remove a status	Maintain statuses
Handle access or sibling-list choices	Handle access and navigation branches
Correct a blocked operation	When maintenance goes wrong
Continue with related configuration	Confirm the result and continue

When you know which status-list task you need, check the access conditions before opening the list.

Before you start

The **PM statuses** page is available through a shared configuration surface. The list and its actions depend on the configuration feature and the access available to your account.

Prerequisites

Check	What to have ready
Page	Access to the PM statuses page
Feature	The project-management configuration feature included in your subscription
Create access	Permission to create a status before using New
Edit access	Permission to edit a status before using the row edit action
Delete access	Permission to delete a status before using the row delete action

When the configuration feature is included, the list and configuration controls are available. When it is not included, the subscription-upgrade surface replaces the list. Subscription access and permissions depend on the current account configuration.

With the feature and access conditions checked, find the **PM statuses** list.

Find the status list

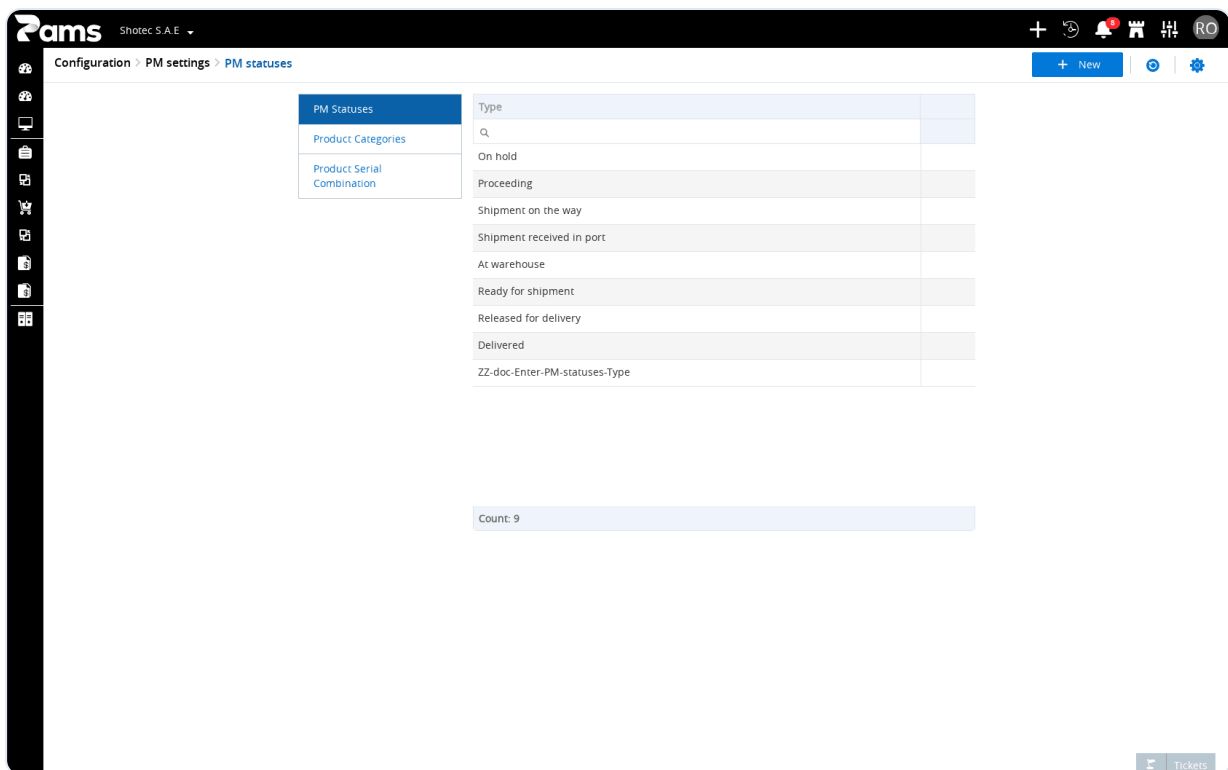
Use this procedure to reach the status list and identify the row or field you need.

Prerequisites

You have access to the configuration area and know whether you are reviewing an existing status or adding a new one.

Steps

1. Open the **PM statuses** page.
2. Confirm that the page heading reads **PM statuses**.
3. Identify the visible **Type** column in the list.
4. Select the row whose status you need to review, or continue with **New** to add a status.



The list also exposes **Refresh** and **Settings**. Paging and header filtering are disabled for this list, so work from the rows and the visible **Type** header.

Result: The **PM statuses** list is open, with nine rows and the **Type** column visible.

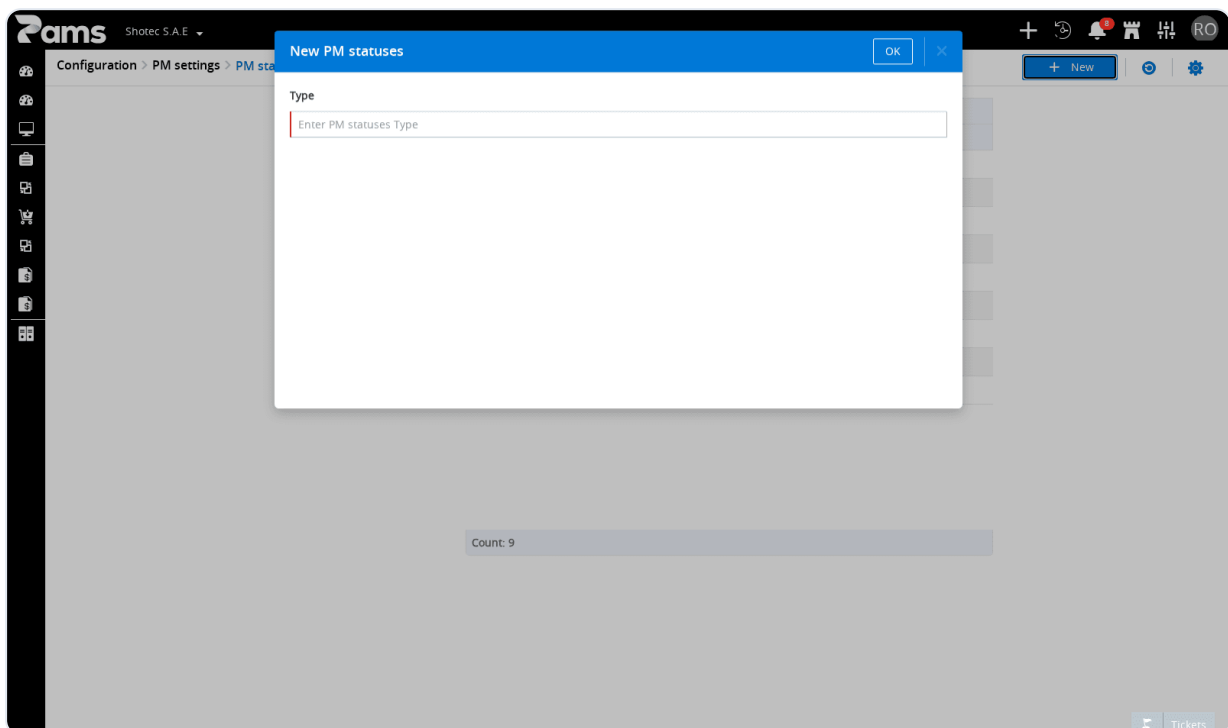
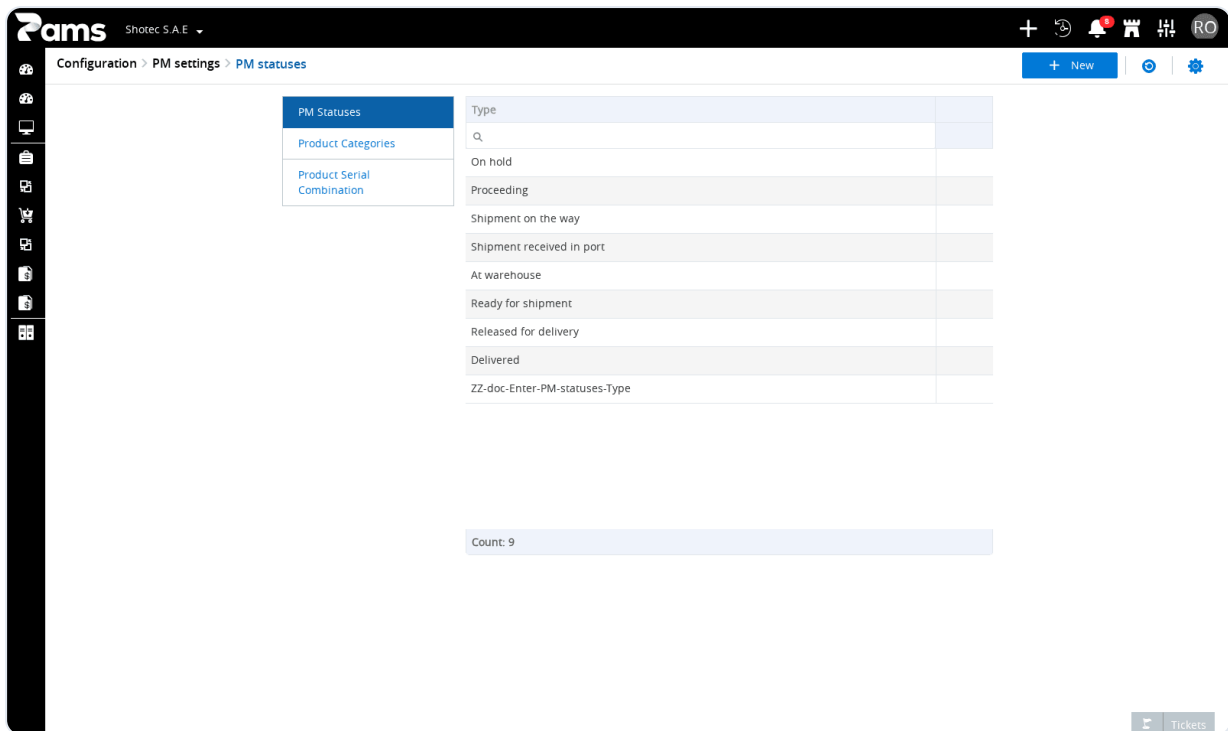
Use the field and form reference next, before choosing a maintenance action.

Understand the status screen

Each status row is identified by its **Type** value. The same value is the editable field in the new and edit form.

Area	What you see	Rule
List	Type	The list shows one visible status column.
New or edit form	Type	The field is required.
List shape	Visible headers	The columns shown depend on the configured column set; use the headers displayed on your screen.
List controls	Paging and header filtering	These list options are disabled.

The shared form opens as New PM statuses when you start a new entry. It shows the required **Type** field and an **OK** button. The dialog does not show **Save** or **Cancel**; use **OK** to submit the dialog's form action.



Choose a maintenance route after identifying the visible field and dialog control.

Maintain statuses

Use the list to add a status, open an existing status for editing, or remove a status when the applicable action is available.

Prerequisites

The list is open. For a new or edited value, you have the status name ready and can identify the **Type** field.

Steps

1. Choose the applicable maintenance route:

If you need to...	Use
Add a status	Select New .
Edit a status	Select the row edit action for the status.
Remove a status	Open the row delete action for the status.

2. Enter or change the value in **Type**.

3. Complete the applicable action:

If you are...	Complete the action
Adding a status	Select OK in the New PM statuses dialog.
Editing a status	Follow the dialog control shown for the edit action.
Removing a status	Open the row delete action for the status.
Leaving without saving	Select Don't Save in the exit confirmation.

Select **Cancel** to close the delete menu without deleting the row.

The dialog opens with the required **Type** field and **OK**.

Result: The selected maintenance route is open, or the status list is visible again after the operation.

Use the access and navigation branch that matches the controls on screen.

Handle access and navigation branches

The shared configuration surface changes what you can do according to feature and permission settings. Use the branch that matches what is on your screen.

What you see	What it means	Next action
The status list and New	The feature and create action are available.	Use Maintain statuses .
The list without the edit action	Editing is not available from the current access settings.	Review the list or ask an administrator about edit access.
The list without the delete action	Deletion is not available from the current access settings.	Review the list or ask an administrator about delete access.
The subscription-upgrade surface	The configuration feature is not included.	Use the subscription route shown on screen.
Product Categories	A sibling reference list is available.	Open Product categories .
Product Serial Combination	A sibling reference list is available.	Open Serial combinations .

After choosing a branch, use the message guidance if the operation stops; the shared list controls may also expose **Export**.

When maintenance goes wrong

Use the message text to identify which part of the status operation needs attention.

Message	When it applies	What to do
Type is required	Type is empty when the form validates.	Enter a value in Type .
Just '_' '-' And '.' Characters Accepted	The value does not meet the field's character rule.	Correct the value in Type .
This Field Is Required	A required field is empty.	Complete the required field and retry the form action.
Forbidden characters detected. Please remove them and try again.	A list filter contains forbidden characters.	Remove the forbidden characters and apply the filter again.
"Are you sure you want to delete this item?"	Removal-request message.	—
Related to Saved data, Can't be deleted	The item is related to saved data.	Keep the item and review the related saved data.
Failed to Delete	The delete request fails for another reason.	Keep the item and retry after checking access.

Message	When it applies	What to do
Must have at least one item	The list contains one item and deletion is attempted.	Keep the remaining item.
Data saved Successfully	A new status is saved.	Return to the list and review the new row.
Data updated Successfully	An existing status is updated.	Return to the list and review the changed row.
Data Deleted Successfully	A status is deleted.	Review the remaining rows.

After correcting the issue, confirm the list result and choose the next configuration task.

Confirm the result and continue

After reviewing or attempting a status operation, confirm the list that remains on screen before moving to related configuration.

Prerequisites

The **PM statuses** list or one of its sibling reference lists is open.

Steps

1. Confirm that the current page is **PM statuses** when you are reviewing project-management statuses.
2. Confirm that the **Type** column identifies the status rows.
3. Select **Product Categories** to continue with product-category configuration.
4. Select **Product Serial Combination** to continue with serial-combination configuration.

Result: You have either returned to the **PM statuses** list or selected a sibling reference list for the next configuration task.