

Projects Management — Learning Path

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This learning path is for project coordinators and order-processing users who manage project orders through planning, ordering, review, and delivery. After completing it, learners will be able to investigate project orders, update their lifecycle status, review order information in Projects Management, and confirm that confirmed orders have progressed to Delivered.

Learning objectives

- By the end of this path you can investigate a project order from the Projects Management Orders list.
- By the end of this path you can use the available status updates to move a project order from Planned (BOM) to To Order (MRQ).
- By the end of this path you can review a project order in Projects Management using PM and Delivered.
- By the end of this path you can save or save and close your review work appropriately.
- By the end of this path you can progress a confirmed order to Delivered and verify it in the delivered-orders view.

Prerequisites

- Access to the [projects management](#) and [orders](#) screens.
- Access to project-order records, including [List](#).
- Permission to use **Status update**, **Save**, and **Save and Close**.
- Familiarity with your organization's project-order process and the meaning of a confirmed order.

Module 1: Find and understand project orders

Goal: Start with the correct project order and establish its current lifecycle position before making changes.

Lesson 1.1: Locate a project order that needs attention

When a project order needs investigation, begin from the central order list rather than working from an assumed status. Open [orders](#), use **All** to view the available orders, and open the relevant [List](#). Review the record before deciding whether the order should remain in planning or advance to ordering.

Practice: In [orders](#), use **All** and open one [List](#) for investigation.

Lesson 1.2: Review a project order in Projects Management

When you need to check a project order from the project-management workspace, open [projects management](#) and access the relevant [Projects Management](#). Use **PM** and **Delivered** as part of your review, then choose **Save** if you will continue working or **Save and Close** when the review is complete.

Practice: Open a project order from [projects management](#), perform a review using **PM** and **Delivered**, then select **Save and Close**.

Module 2: Move an order from planning to ordering

Goal: Progress an investigated project order through the planning and order-request stages.

Lesson 2.1: Confirm that an order is planned for BOM work

When an order is being prepared for bill-of-materials planning, open it from [orders](#) and enter the associated [Buyout to Po](#). Use **Status update** and select **Planned (BOM)** to reflect that the order is in the planning stage.

Practice: Open a project-order record and use **Status update** to set it to **Planned (BOM)**.

Lesson 2.2: Send a planned project order to the order-request stage

After planning is complete, progress the same project order so it can move into the ordering process. From the [Buyout to Po](#), select **Status update** and choose **To Order (MRQ)**. This creates a clear lifecycle transition from planned work to an order request.

Practice: For a record in **Planned (BOM)**, use **Status update** to move it to **To Order (MRQ)**.

Module 3: Complete and verify delivery progress

Goal: Mark confirmed work as delivered and verify the result in the delivered-order workspace.

Lesson 3.1: Progress a confirmed order to Delivered

When a confirmed order has reached delivery completion, open the order in [orders](#) and access its [Project Orders List](#). Use **Status update** and select **delivered** to record the completed delivery state.

Practice: On a confirmed order, use **Status update** to select **delivered**.

Lesson 3.2: Verify delivered orders

After updating an order, verify that delivery work is represented in the dedicated delivered-order view. Open [delivered orders](#) and review the delivered order alongside its [Project Orders List](#). Use this verification step to ensure that an order progressed from active processing into delivery completion.

Practice: Open [delivered orders](#) and verify one delivered project order against its record.

Final assessment

1. A project order requires investigation before anyone changes its lifecycle status. Where do you start, and what control helps you view the available order set?
2. An order has completed bill-of-materials planning and must now enter the order-request stage. Which status transition should you perform?
3. You are reviewing a project order in Projects Management and have finished all work on the record. Which action should you use to preserve the review and leave the record?
4. A confirmed order has completed delivery. Which control and status value should you use to record this outcome?
5. After setting an order to delivered, which screen should you use to verify that the delivered order is represented in the delivery-focused workspace?

Answers

1. Start in [orders](#), use **All**, and open the relevant project record. This lets you investigate the order before changing it.
2. Use **Status update** to move the order from **Planned (BOM)** to **To Order (MRQ)**. This progresses it from planning to the order-request stage.
3. Use **Save and Close**. It preserves the completed review and exits the record.
4. Use **Status update** and select **delivered**. This is the documented action for progressing a confirmed order to Delivered.
5. Use [delivered orders](#). This is the dedicated workspace for reviewing delivered orders.