

Eliminate confusion between **COMPLETED** and **CLOSED** in ProDOC Packages!

The screenshot shows the 'Package Manager' window with a table of packages. The table has columns: STATUS, NAME, TYPE, PRODUCT, CREATED ON, and CREATED BY. The following table represents the data shown in the screenshot:

STATUS	NAME	TYPE	PRODUCT	CREATED ON	CREATED BY
Open	NEW PACKAGE 2018...	Visa App pa...		2018-06-15	ELAMBERTY
Completed	NEW PACKAGE 2018...	Mikes OC Ti...		2018-06-13	MHANSEN
Cnx eSign	NEW PACKAGE 2018...	E Pack		2018-06-13	JSNOW
Created	NEW PACKAGE 2018...	KarlJody		2018-06-12	KJOHNSON
Out For eSign	Old Ocean EDS Training	Expense Re...		2018-06-11	TWRIGHT
Open	NEW PACKAGE 2018...	E Pack		2018-06-11	ELAMBERTY
Closed	Karlagain3 Johnsonaga...	Training_Pa...	Johnsonagain3 987654...	2018-05-25	KJOHNSON
Declined	Firstagain LastAgain 65...	Training_Pa...	LastAgain 654321 Trai...	2018-05-25	KJOHNSON
Canceled	Karl Test Johnson Test...	Training_Pa...	Johnson Test 1234567...	2018-05-25	KJOHNSON
Ready To Sign	Tim IPAD Test	Training_Pa...		2018-05-25	RDISUPPORT
Completed	Karl Test Johnson Test...	Training_Pa...	Johnson Test 1234567...	2018-05-25	KJOHNSON
Data Changed	Johnson Test Test	Expense Re...	Test	2018-05-18	KJOHNSON
Document Added	NEW PACKAGE 2018...	Training_Pa...		2018-05-18	ELAMBERTY

These two words can be confused as similar in meaning. A dictionary check defines:

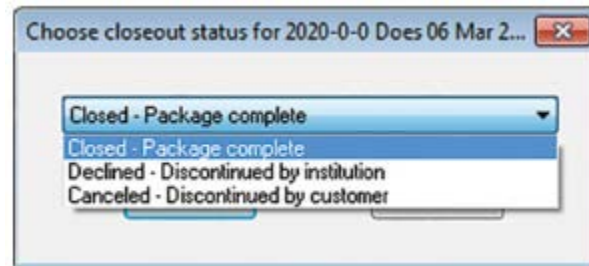
- **Completed** - having all the necessary parts or elements to finish
- **Closed** - not open

To understand these statuses in ProDOC's Package Manager, the dictionary definitions are important to know as well as these more technical ones below:

- **Completed: Required (automatic)**
- **Closed: Done (human interaction)**

Summing up these two meanings and applying them to Package Manager statuses, we get:

- **Completed:** Once all **REQUIRED** documents have been gathered, signed and **returned** (although optional documents may not be), **the system automatically** changes the status to **Completed**.
- **Closed:** Once a Package has a Completed status, **a user from your organization**, by permission only, now must go into the Completed Package to determine **if this package is done and ready to be closed**. They then specify a reason at **Close out**.



Did you find this tip helpful?

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