

TPG PPP - Scheduler User Guide 2.12 EN

Version: 2.12.0
Status: 8/20/2025

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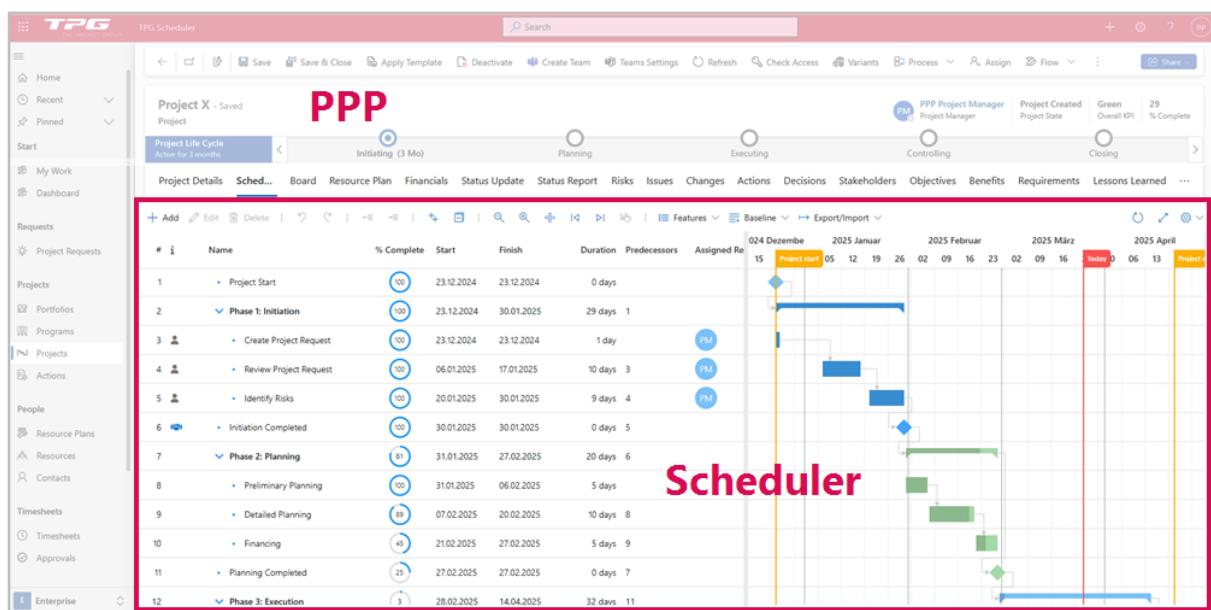
1 General Features

TPG ProjectPowerPack (PPP) is a cloud-based app for project and portfolio management.

Additional apps are integrated into PPP that fulfill various tasks.

The TPG Scheduler is integrated for project planning. The TPG Scheduler provides all the essential functions for project scheduling.

The **TPG Scheduler** can be found in the *Schedule* tab.



1.1 Views and Functions PPP

TPG PPP offers numerous views and functions:

- Programs and portfolios
- **Project lists** with traffic light indicators and project attributes (progress, KPI, start and finish date, etc.)
- **Kanban view of actions**
- **Resource management** with resource attributes (department, cost rate, availability)
- Project requests with drivers and approval process

- Assignment of project types and templates
- **Task planning**^[32] and **resource allocation**^[77] with TPG Scheduler
- Recording of budget, forecasts and actual values in time periods
- Risks, problems, changes, **actions**^[150] and decisions at project level
- Project assignment: drivers, goals, benefits, requirements
- Stakeholder analysis and lessons learned
- **Inter-project Links**^[69]
- **Status Update**^[92] and Status Report
- Comprehensive reporting package
- Drivers and priorities of project proposals and projects
- Functions for list entries
 - Grouping
 - Hiding and showing columns
 - Sorting in ascending / descending order
 - Filter
 - Export to Excel
 - Import from Excel
- Available languages: German, English, French, Arabic, Portuguese, Italian

▶ Access rights are assigned via groups and roles.

1.2 Configuration Options PPP




Company-specific configurations are possible in TPG PPP. The configurations are carried out by The Project Group or by administrators.

Possible configurations:

- Layout adaptation to CI
- Languages for the user interface
- Currency
- Users
- Resources and contacts
- Availability (calendar)
- Departments
- Project types
- Preset views (fields, dashboard)
- Options in some drop-down menus
- Color settings for heatmaps
- Time units for resource and cost planning (by default: months)
- Workflows
- Notifications

2 User Interface

The PPP user interface is explained below:

- [Overview](#)  9
- [Workspace](#)  10
- [Language settings](#)  10
- [Navigation bar](#)  17

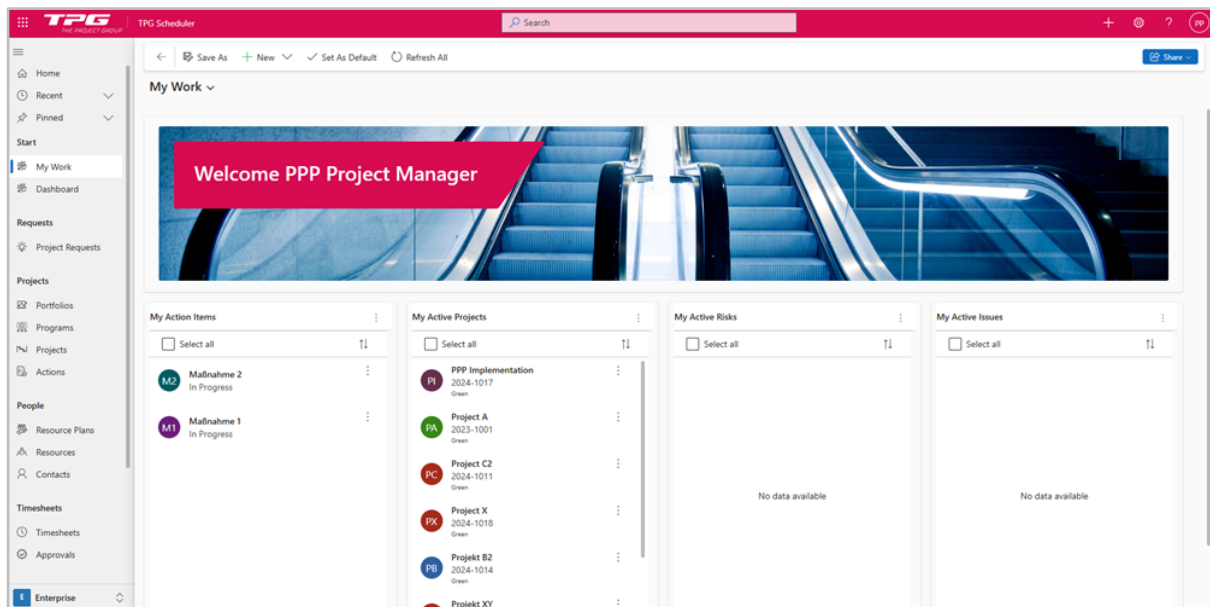
2.1 Overview

When TPG PPP is opened, the “My work” page opens as the start page by default.

This page provides an overview of the user's current work with project names, status information and links to the data records.

Linked data records:

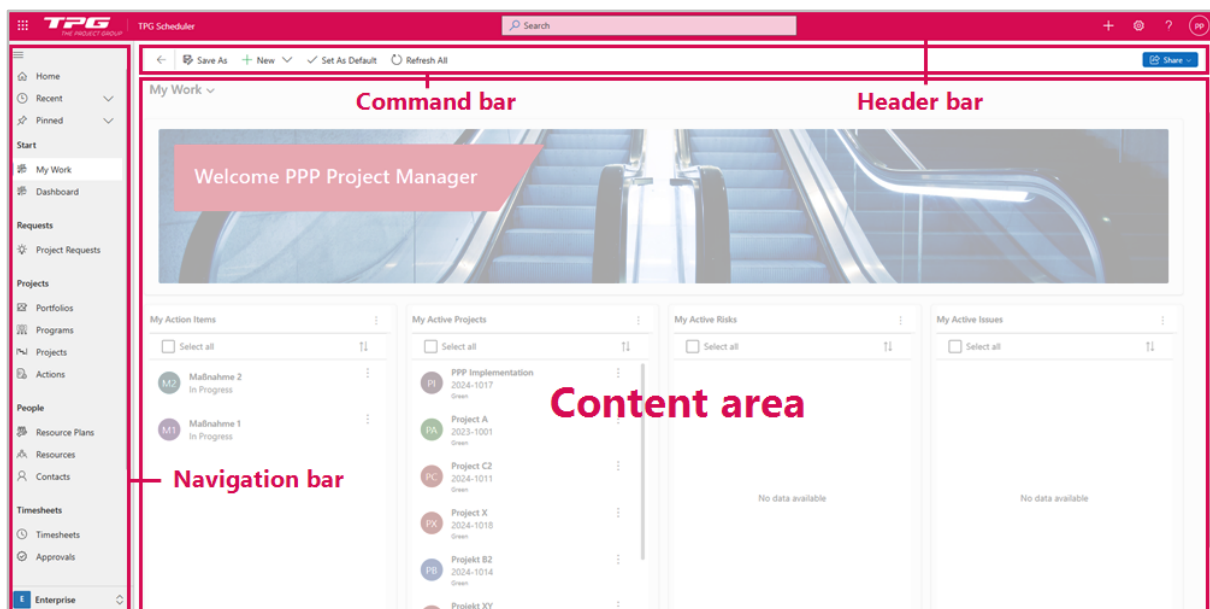
- My Action Items
- My Active Projects
- My Active Risks
- My Active Issues



2.2 Workspace

The workspace in the TPG PPP is divided into 4 areas:

- **Header bar:** Search function, buttons for quick data entry, notifications, personalization settings, etc.
- **Command bar:** Buttons depending on the content area
- **Navigation bar:** Access to pinned and recently viewed pages. Access to home pages, applications, projects, reports, etc.
- **Content area:** “My work”, dashboard, workspace for reading and editing data records



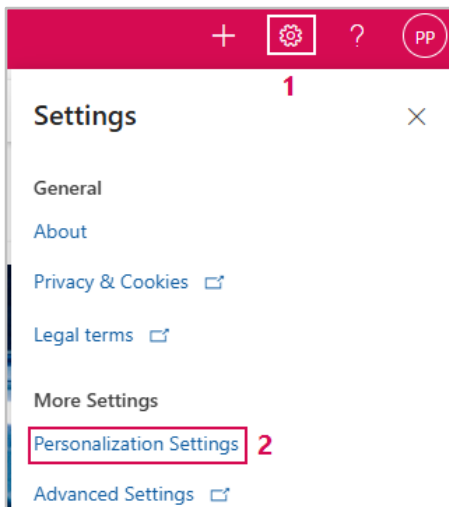
2.3 Language Settings

The TPG PPP is available in the following languages: German, English, French, Arabic, Portuguese, Italian.

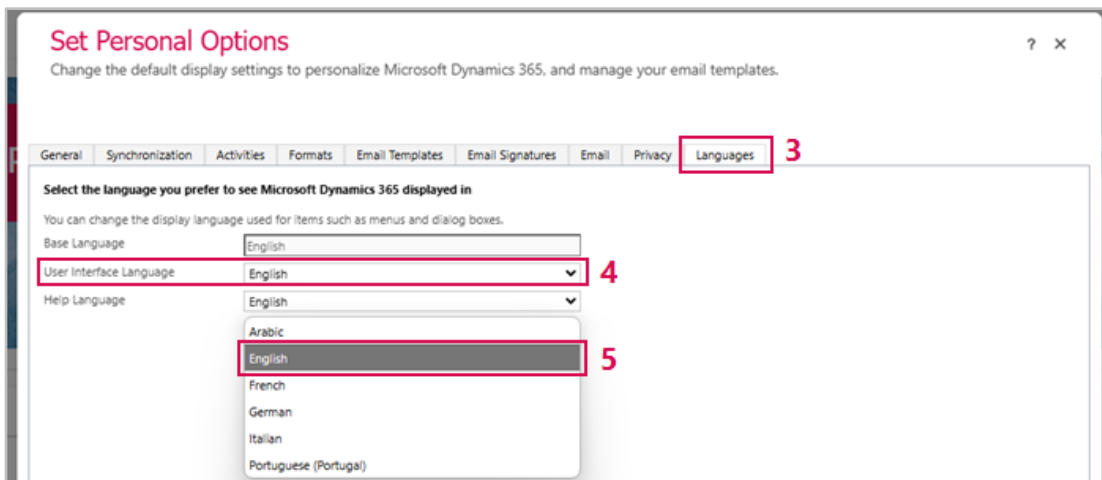
You can specify the language under *Personalization Settings*:

- Click on the settings icon in the header bar (1)

- Click on *Personalization Settings* (2)



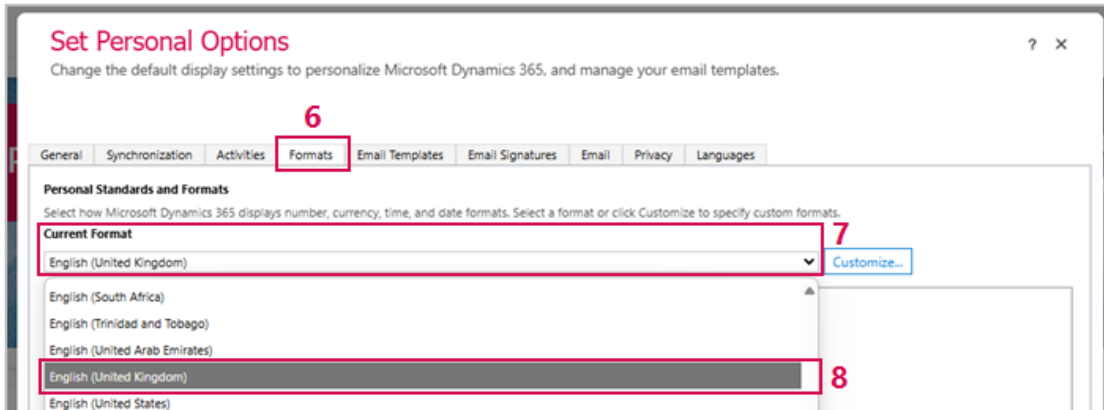
- Click on the *Languages* tab (3)
- Click on the *User Interface Language* field (4). ▶ A drop-down menu opens.
- Select the desired language (e.g. *English*) (5).



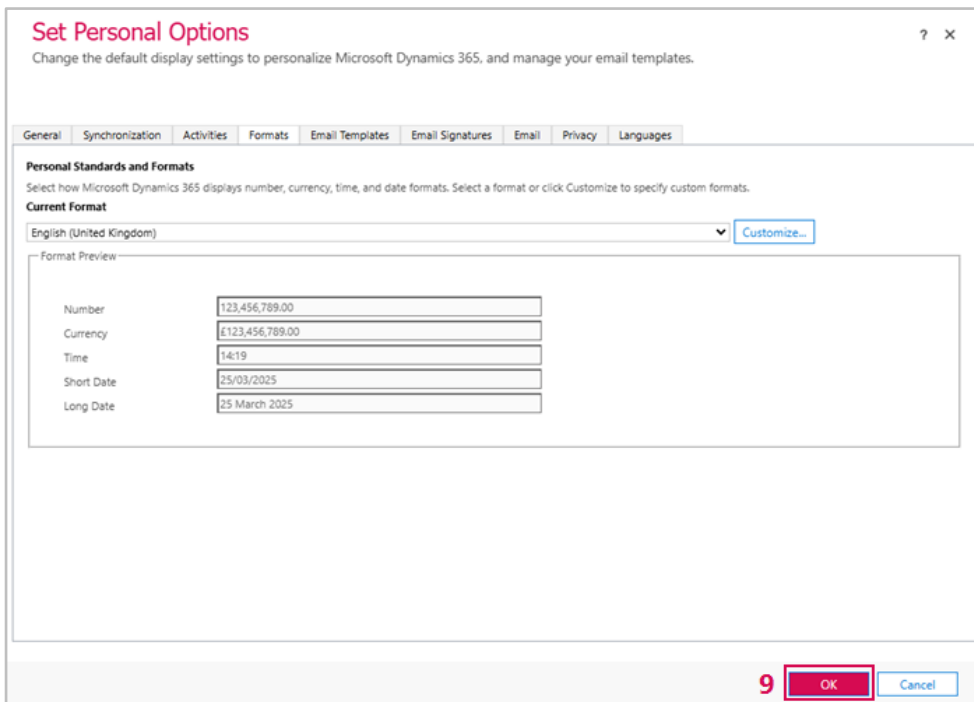
Customize formats of number, currency, time and date information:

- Click on the *Formats* tab (6).
- Click on the *Current Format* field (7). ▶ A drop-down menu opens.

- Select the desired language (e.g. *English (United Kingdom)*) (8).



- Click on *OK* (9)



- ▶ The language, with the character formats, is set.

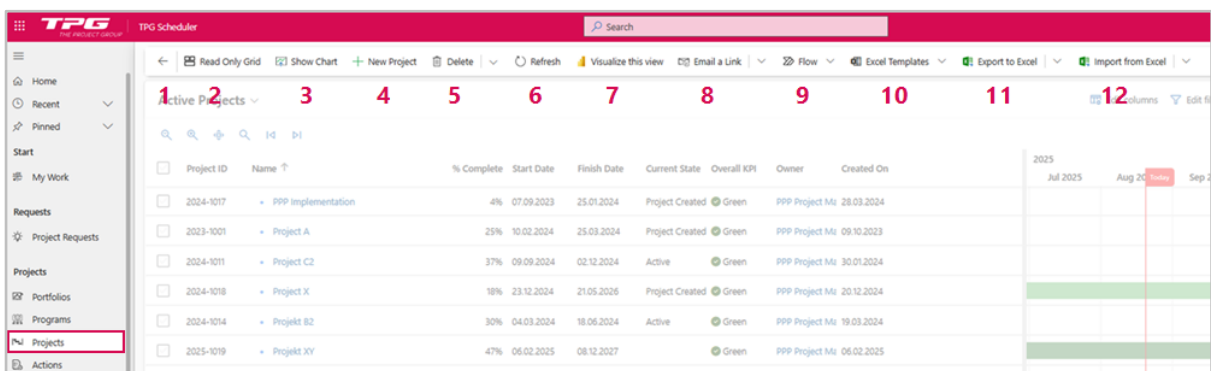
2.4 Command Bar

The Command Bar is located above the **Content Area** ¹⁰.

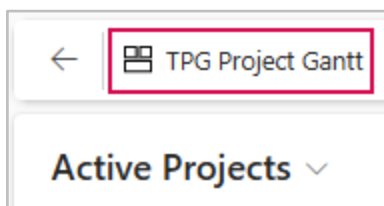
The Command Bar contains buttons that provide you with various functions depending on the Content Area (e.g., *Home, Portfolios, Programs, Projects, Actions*). Some of these buttons are standardized and the same in every view, while others are displayed additionally depending on the Content Area.

Projects Content Area view

The following section explains the buttons using the *Projects* Content Area as an example:

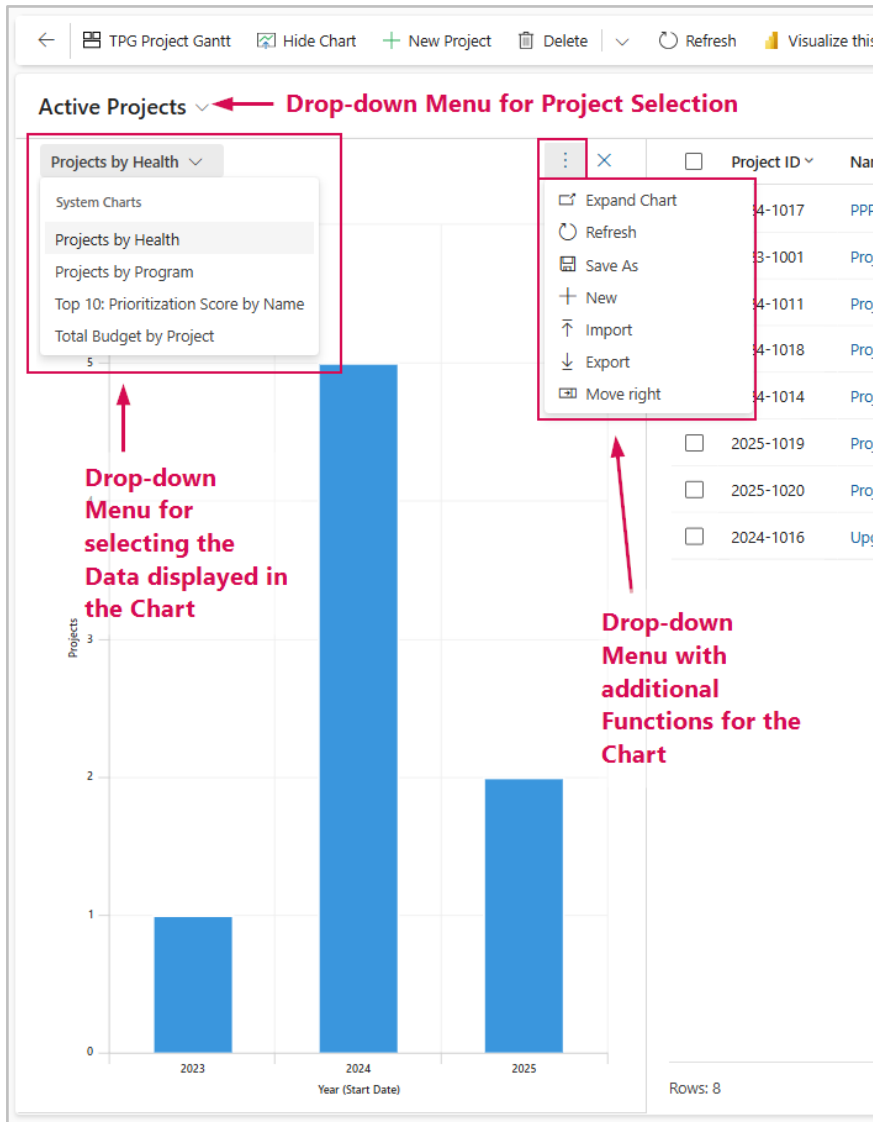


- **Go Back:** Navigates to the previously opened page. (1)
- **Read Only Grid:** Gantt Chart is hidden. (2)
 - Click on **Read Only Grid** ▶ The Gantt Chart is hidden and only the table with the active projects is displayed.
 - Click on **TPG Project Gantt** to display the Gantt Chart again.

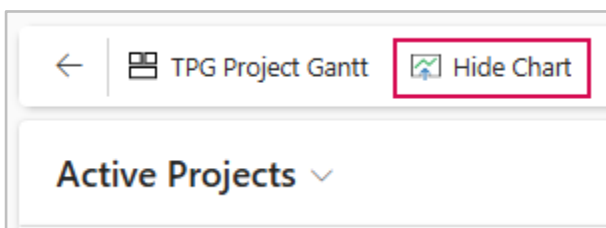


- **Show Chart:** Displays charts for the data records in the table in the Content Area (e.g., *Projects*). (3)

➤ Click on *Show Chart*. ➤ A diagram will be displayed. Various options are available:



➤ Click on *Hide Chart*, to hide the chart.

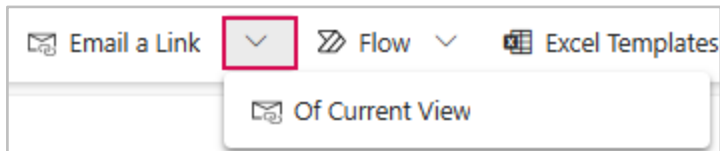


- *New Project*: Create a new Project. (4)
- *Delete*: Deletes the Projects. (5)

⚠ This action cannot be undone.

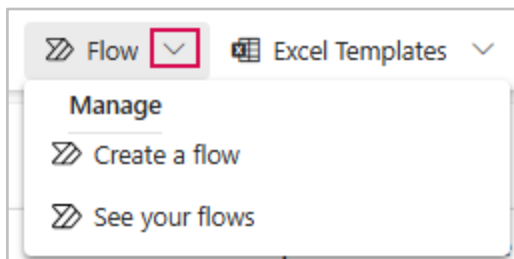
- *Refresh*: Page is being updated. (6)
- *Visualize this view*: Creation of a visual report in Power BI about the current view. (7)
- *Email a Link*: Sends a link to selected data records by email. (8)

➤ Click the down arrow to send a link to the current view.



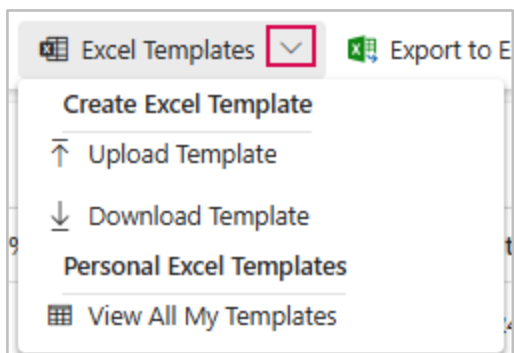
- *Flow*: Runs a Flow for the selected project. (9)

➤ Click the down arrow to manage Flows.



- *Excel Templates*: Creation of Excel documents or templates. (10)

➤ Click the down arrow to create Excel templates.



- *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table. (11)
- *Import from Excel*: Import data from Excel spreadsheet. (12)

▶ Standard chart views are displayed automatically when enabled. Most tables already contain basic charts, and additional charts can be added individually. Please contact your administrator or TPG Support for assistance with this.

View with selected project

Once one or more projects have been selected or marked, additional commands appear in the Command Bar:


- *Edit*: Edit Project.
- *Activate*: Activate Project.
- *Deactivate*: Deactivate Project.
- *Assign*: Changes the owner of the selected Project.
- *Share*: Shares the Project with selected individuals or teams without changing ownership.
- *Word Templates*: Creates Word documents and templates.

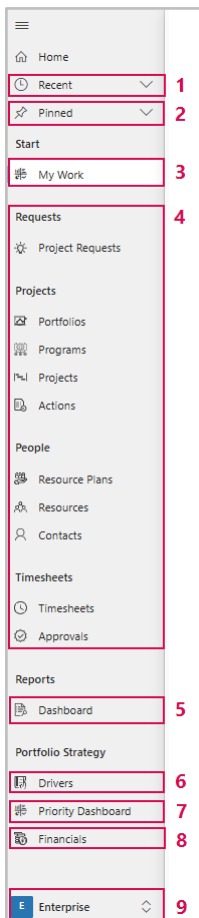
The screenshot shows the 'Active Projects' table in the TPG Project Scheduler. The table has columns for Project ID, Name, % Complete, Start Date, Finish Date, Current State, and Overall KPI. The project 'Project X' (ID: 2024-1018) is selected. The Command Bar above the table includes buttons for Edit, Activate, Deactivate, Delete, Assign, Share, Email a Link, Word Templates, and Export to Excel.

Project ID	Name	% Complete	Start Date	Finish Date	Current State	Overall KPI
<input type="checkbox"/> 2024-1017	PPP Implementation	4	07.09.2023	25.01.2024	Project Created	Green
<input type="checkbox"/> 2023-1001	Project A	25	10.02.2024	25.03.2024	Project Created	Green
<input type="checkbox"/> 2024-1011	Project C2	37	09.09.2024	02.12.2024	Active	Green
<input checked="" type="checkbox"/> 2024-1018	Project X	18	23.12.2024	21.05.2026	Project Created	Green

2.5 Navigation Bar

The navigation bar is on the left-hand side of the user interface. The navigation bar offers the following navigation options:

- Drop-down menu with the most recently viewed pages (1)
- Drop-down menu with the bookmarked pages (2)
- *Start:*
 - *My work:* direct access to your current actions, projects, etc. (3)
- Links to the lists with existing data records (4)
- *Reports:*
 - *Dashboard:* graphical overview of all projects, portfolios and programs (5)
- Link to drivers for project applications and projects (6)
- Project priorities: Graphical overview of drivers and project priorities (7)
- Listing of financial data (8)
- Switch to *Settings* and *About*  (9)



2.6 Product Information

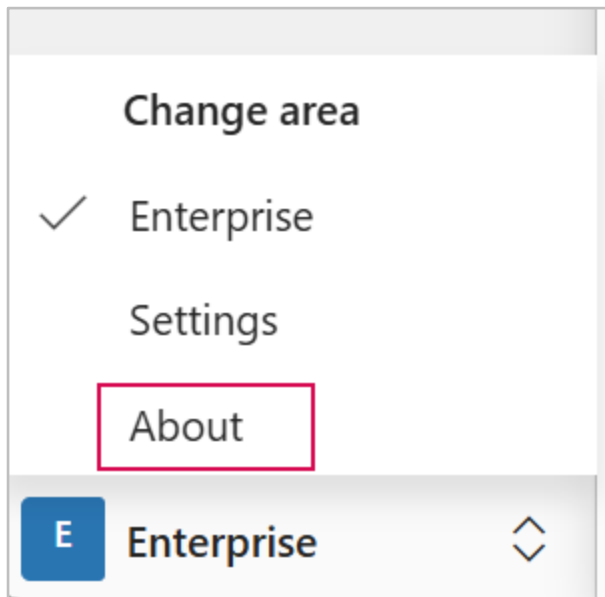
In the *About* section, you will find important information about PPP:

- Version number (1)
- Links to user manuals, release notes, and licenses (admin only) (2)
- Integrated components (admin only) (3)

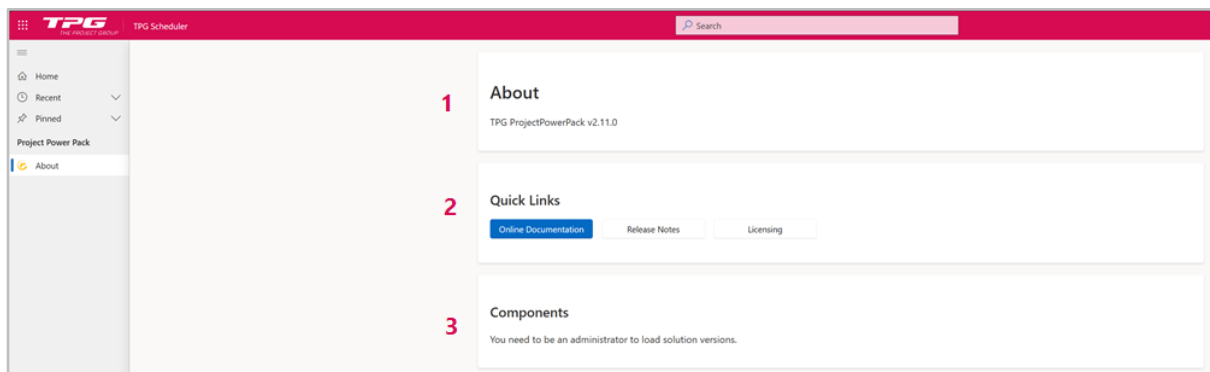
To access the product information, follow these steps:

- Click on *Enterprise* in the bottom navigation bar. ► A dropdown menu will appear.

➤ Click on *About*.



▶ The *About* section with the product information will open.



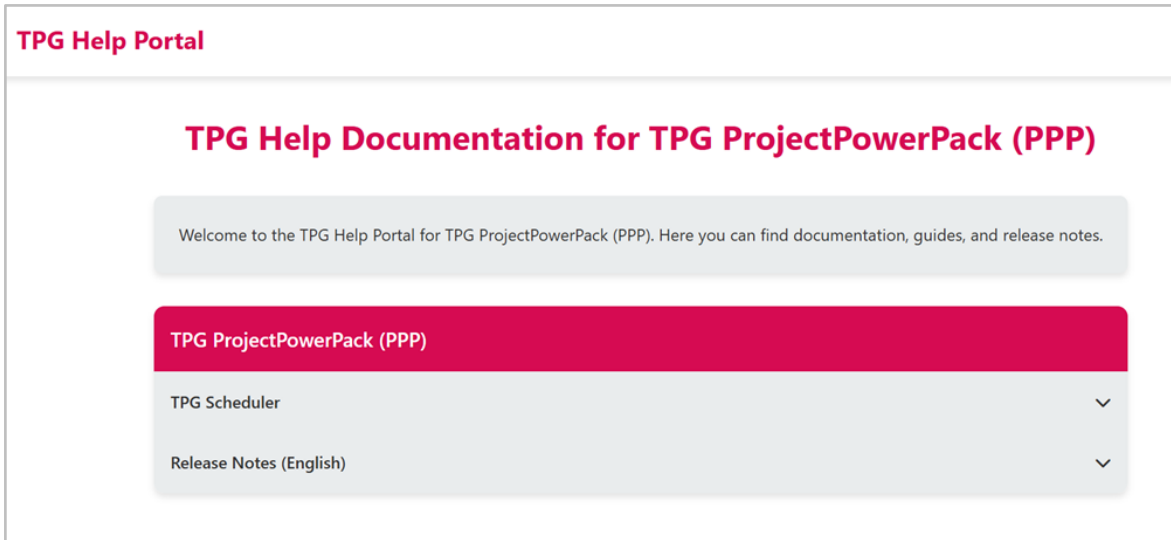
Opening User Guides and Release Notes:

➤ Click on *Online Documentation* to access the User Guides.

Or

➤ Click on *Release Notes* to access the Release Notes.

▶ The *TPG Help Portal* will open.



➤ Click on *TPG Scheduler*. ► A dropdown menu will appear.



➤ Click on the User Guide that corresponds to the version number of your installed product. ► The User Guide will open.

► To open the Release Notes, follow the steps described above.

3 Project

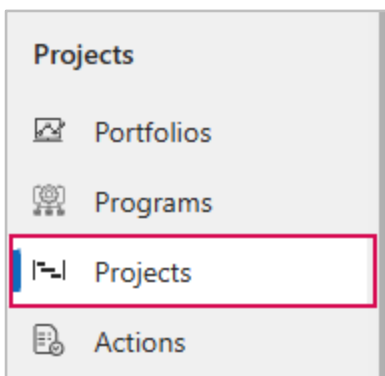
This section describes how to create a new project with TPG PPP.

- [Create new Project](#)²¹
- [Project Overview](#)²²

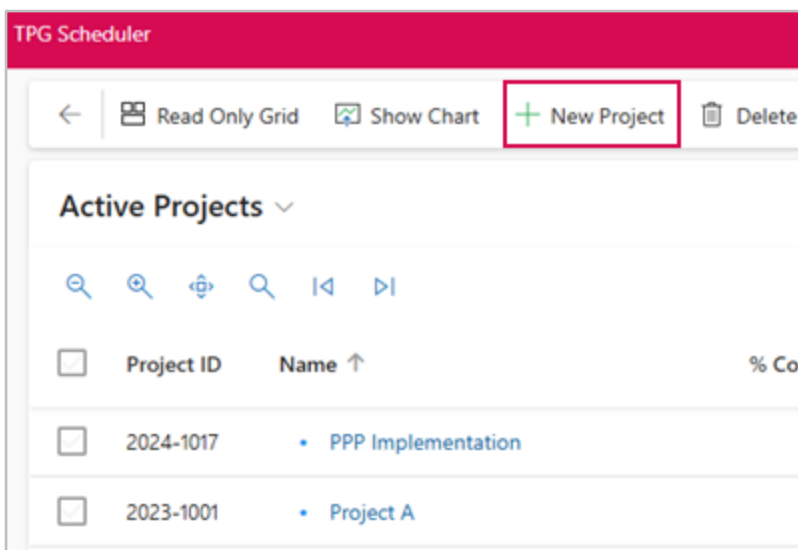
3.1 Create new Project

To create a new project in TPG PPP, follow these steps:

- Click on *Projects* in the navigation bar. ➤ A list with all **active projects**²² opens.

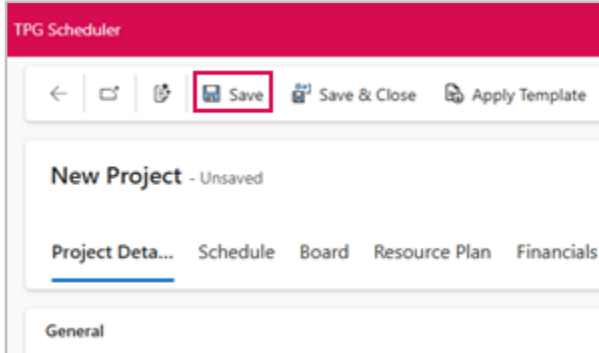


- Click *New Project* in the command bar. ➤ The *Project Details* tab opens.



➤ Fill in the project master data. (see [Project Details](#) ²⁶)

➤ Click *Save* in the command bar.



▶ A new project is created.

3.2 Project Overview

In TPG PPP you will find a list of projects under *Projects*. All active projects are listed by default.

The views are divided into two areas:

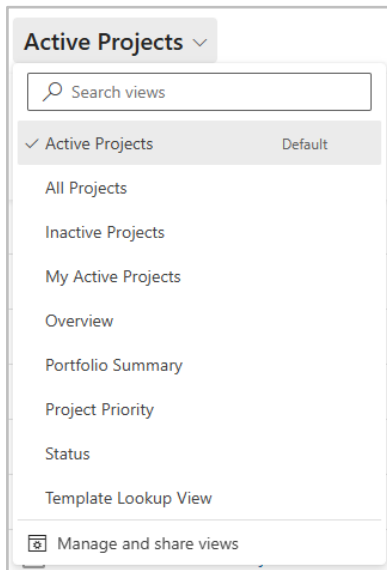
- Table: Columns for selecting individual data records, links for opening the data records and other columns that you can select via *Edit columns* (2).
- Graphical: Graphical project overview with various *Features* (5).

Project ID	Name	% Complete	Start Date	Finish Date	Current State	Overall KPI	Owner	Created On
<input type="checkbox"/>	2024-1017 • PPP Implementation	4%	07.09.2023	25.01.2024	Project Created	Green	PPP Project Ma	28.03.2024
<input type="checkbox"/>	2023-1001 • Project A	25%	10.02.2024	25.03.2024	Project Created	Green	PPP Project Ma	09.10.2023
<input type="checkbox"/>	2024-1011 • Project C2	37%	09.09.2024	02.12.2024	Active	Green	PPP Project Ma	30.01.2024
<input type="checkbox"/>	2024-1018 • Project X	29%	23.12.2024	21.04.2025	Project Created	Green	PPP Project Ma	20.12.2024
<input type="checkbox"/>	2024-1014 • Projekt B2	30%	04.03.2024	18.06.2024	Active	Green	PPP Project Ma	19.03.2024
<input type="checkbox"/>	2025-1019 • Projekt XY	31%	06.02.2025	08.12.2027		Green	PPP Project Ma	06.02.2025
<input type="checkbox"/>	2025-1020 • Projekt XY2	0%	20.02.2025		Project Created	Green	PPP Project Ma	20.02.2025
<input type="checkbox"/>	2024-1016 • Upgrade DO 3000 to 3500	0%	06.05.2024	31.07.2024	Project Created	Green	PPP Project Ma	25.03.2024

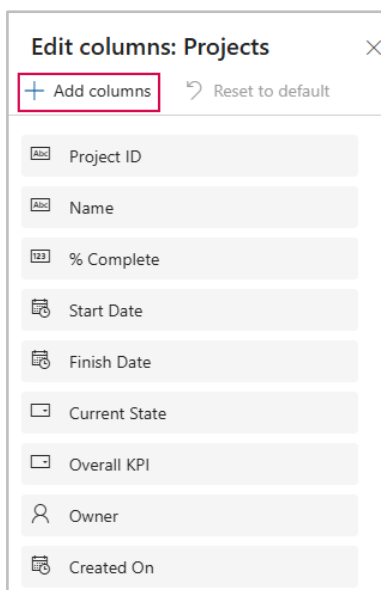
Link to open the data records
Column for marking individual data records
Graphical project overview

There are options to customize the view:

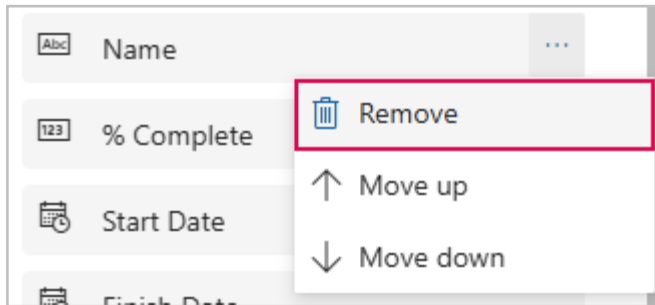
- Selection menu of displayed projects (1): *Active projects* are displayed by default. Further display options are available for selection:
 - Click on the arrow. ► A drop-down menu opens.
 - Click on the desired display option.



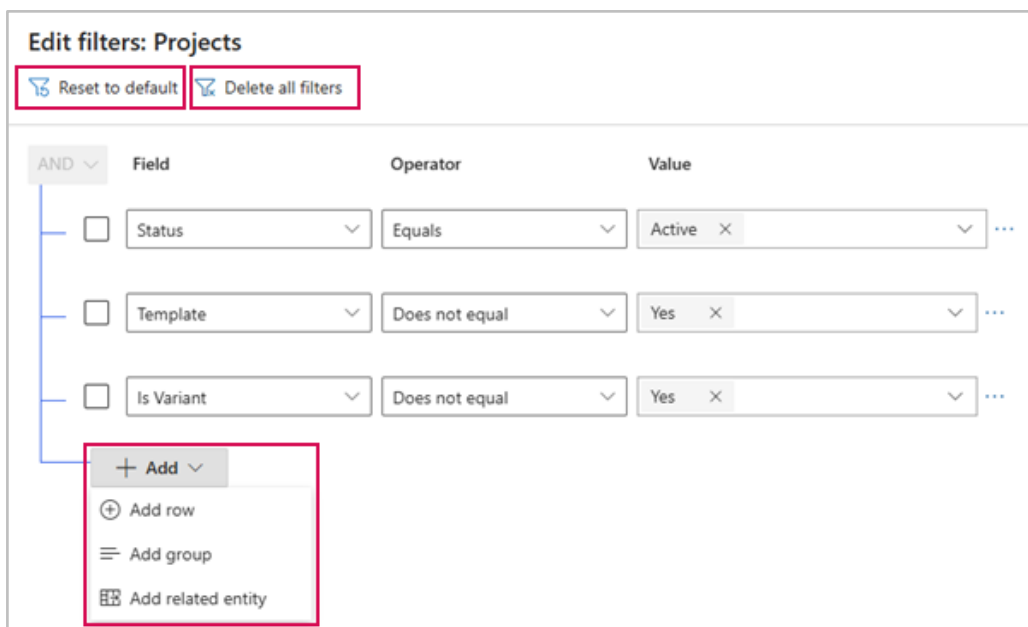
- *Edit columns* (2): Add columns and change the order of the columns using drag & drop.
 - Click on *Edit columns*. (2) ► A form opens.
 - Click on *Add columns* and select the columns you want to add.



- Click on the column you want to move and drag the column to the desired position while holding down the mouse button.
- Click on the 3 dots in the column and select *Remove* from the drop-down menu to delete a column.

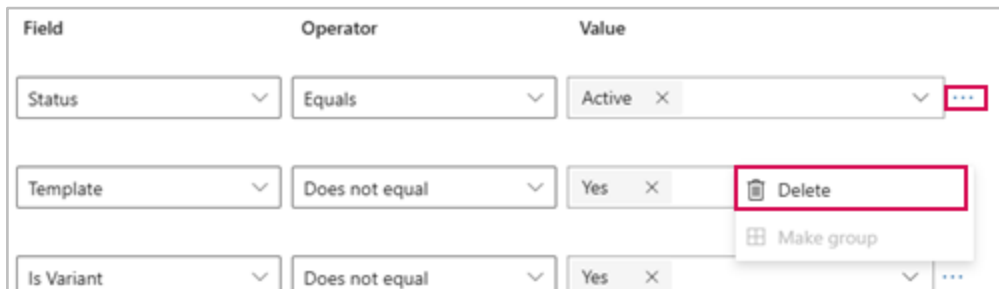


- Click *Reset to default* to restore the default settings.
- Click on *Apply* to apply the changes to the view.
- *Edit filters (3)*: Filter options for displayed projects.
 - Click on *Add*. ► A drop-down menu opens.
 - In the drop-down menu, select whether you want to add a row, a group or an associated entity.

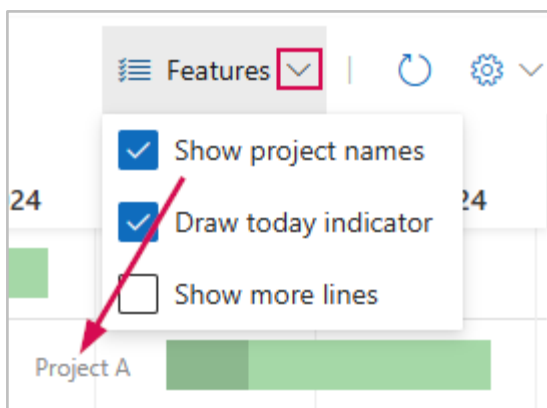


- Set the attributes according to which the projects are to be filtered.

- Click on the three dots next to the filter and click on *Delete* to delete a filter.

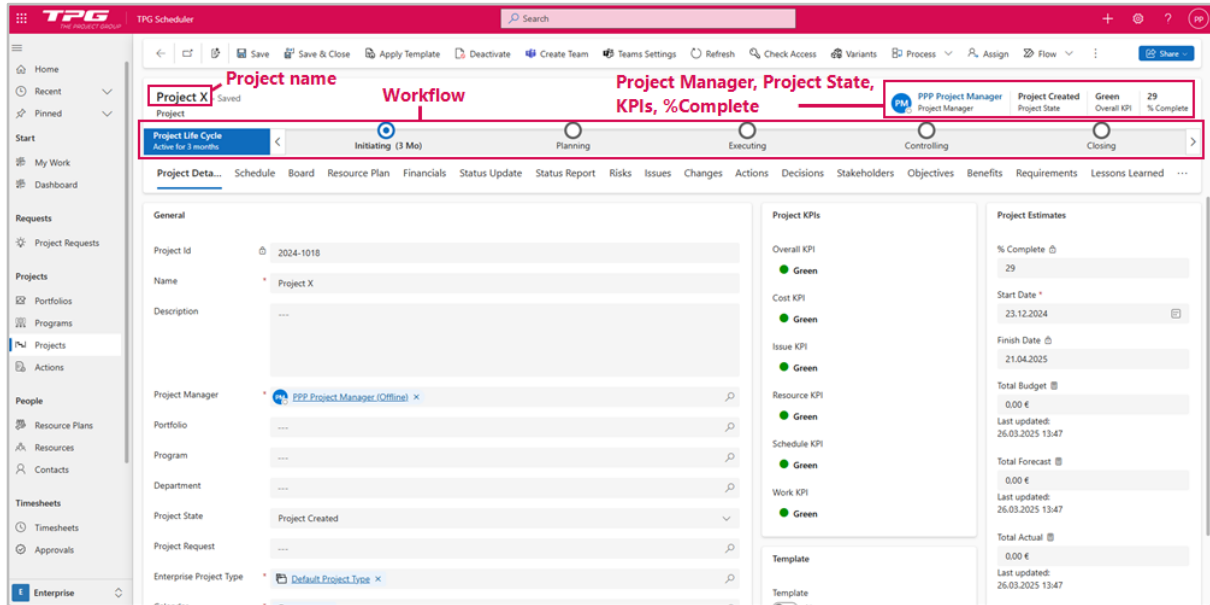


- Click on *Delete all filters* to delete all filters.
- Click *Reset to default* to restore the default settings.
- Click on *Apply*. ▶ Only the projects to which the desired filters apply are displayed in the table.
- *Filter by keyword (4)*:
 - Click on the *Filter by keyword* field.
 - Enter the keyword you want to filter by.
 - Click on the cross in the *Filter by keyword* field to delete the filter.
 - ▶ The projects whose names contain the keyword are displayed.
- *Features (5): Elements in graphical overview*.
 - Click on the arrow. ▶ A drop-down menu opens.
 - Click on the elements to be displayed in the graphical overview.



4 Project Details

The *Project Details* tab provides you with the most important information about a project.



The information is grouped into 4 areas:

- **General** ²⁶
- **Project KPIs** ²⁸
- **Project Estimates** ³⁰
- **Template** ³¹

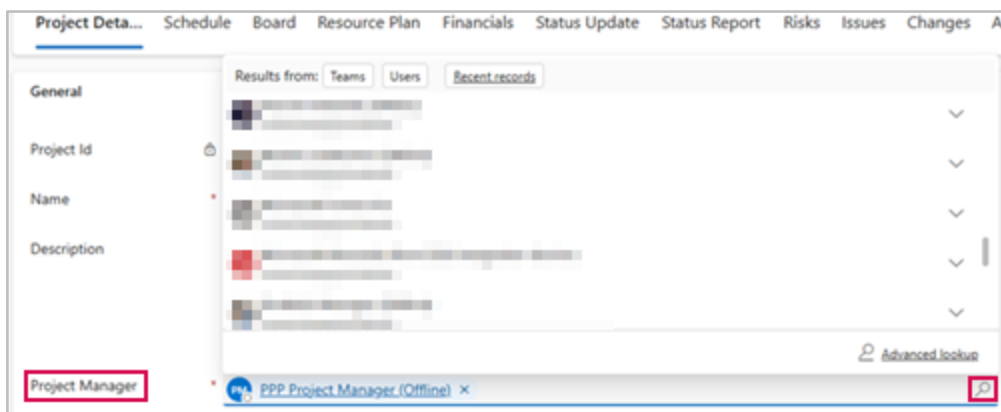
4.1 General

This section displays general information about the project:

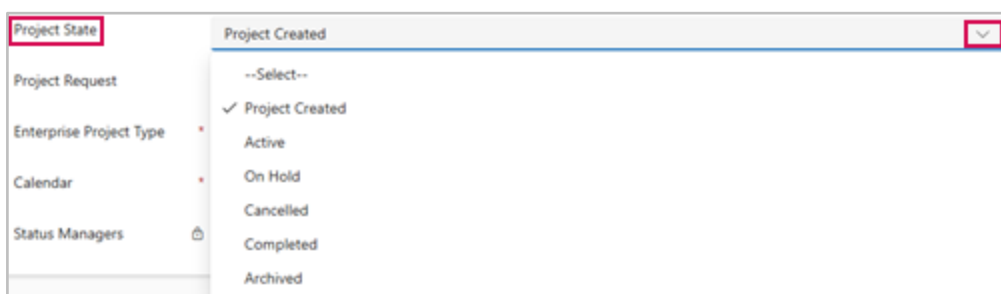
► To make edits on the other tabs, the mandatory fields must be completed. All mandatory fields are marked with a red star.

- *Project Id*: Is assigned automatically.
- *Name*: Name of the project.

- Click in the field and enter the name of the project.
- **Description:** Short description of the project.
- **Project Manager:** By default, the person who created the project is entered as the project manager. You can change the project manager:
 - Click on the search icon (magnifying glass) in the *Project Manager* input field. ▶ A drop-down menu opens.
 - Select the project manager from the drop-down menu.



- **Portfolio:** Assign project to a portfolio.
 - ▶ Follow the steps described above for the *Project Manager*.
- **Program:** Assign project to a program.
 - ▶ Follow the steps described above for the *Project Manager*.
- **Department:** Assign project to a department.
 - ▶ Follow the steps described above for the *Project Manager*.
- **Project State:** Set project state.
 - Click on the arrow in the *Project State* input field. ▶ A drop-down menu opens.
 - Select the project state from the drop-down menu.



- *Project Request*: Assign project to a project request.
 - ▶ Follow the steps described above for the *Project Manager*.
- *Enterprise Project Type*: “Default Project Type” is selected by default. You can change the Enterprise Project Type.
 - ▶ Follow the steps described above for the *Project Manager*.
- *Calendar*: The “Default” calendar is selected by default. You can change the calendar.
 - ▶ Follow the steps described above for the *Project Manager*.
- *Status Managers*: Team that can approve and reject time recording requests for the project. This field is automatically filled in by PPP as soon as a time confirmation is made in the project for the first time.

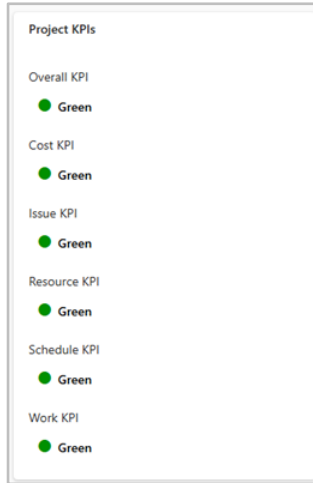
4.2 Project KPIs

This section groups the key performance indicators (KPIs) of your project into various categories. These categories help you to quickly understand the progress and performance of your project at a glance.:

The KPIs are divided into the following main categories:

- *Overall KPI*: This KPI provides an overview of the overall progress and status of the project.
- *Cost KPI*: This KPI monitors the actual costs compared to the planned budget.
- *Issue KPI*: This KPI shows problems and risks in the project.
- *Resource KPI*: This KPI shows the utilization and availability of project resources, such as personnel, materials and equipment.
- *Schedule KPI*: This KPI monitors progress against the schedule.

- **Work KPI:** This KPI shows the productivity and efficiency of the project work (does work performance meet expectations).



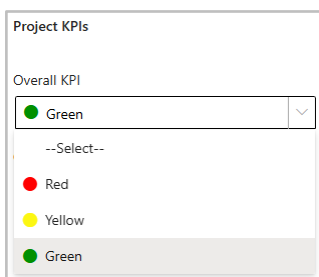
The status of each KPI is visualized by a traffic light indicator:

- **Green:** There are no problems.
- **Yellow:** There are minor deviations or risks that should be monitored.
- **Red:** There are significant problems or delays that require immediate attention.

▶ This traffic light indicator enables you to quickly recognize the current status of the project and take action if necessary.

You can change the status of the KPIs in this area:

- Select the KPI whose status you want to change.
- Click on the KPI. ▶ A drop-down menu opens.
- Click on the color that visualizes the desired status.
- ▶ The status of the KPI is changed.



4.3 Project Estimates

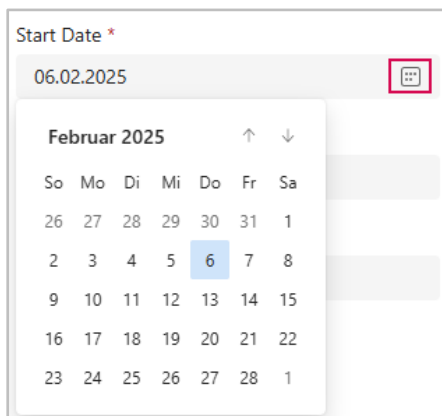
In this section you will find an overview of the project budget and schedule:

➤ **%Completed:** Progress of the entire project in percent.

▶ This field is updated automatically. The progress is calculated on the *Schedule* tab. (see [Progress Indicator](#) ⁽⁶⁷⁾)

➤ **Start Date:** Start date of a project

➤ Click on the calendar icon and select the start date in the calendar.



▪ **Finish Date:** Estimated end date of the entire project. End of the last task in the project plan.

▶ This field is updated automatically. The end date is calculated on the *Schedule* tab. (see [Define Duration of Task](#) ⁽⁴⁶⁾)

▪ **Total Budget:** Total financial framework available for the project.

▪ **Total Forecast:** Current estimate of the total cost of the project.

▪ **Total Actual:** Actual costs incurred up to a certain point in time.

▶ Budgets are entered on the *Finances* tab.

Recalculate *Total Budget*, *Total Forecast* and *Total Actual*:

➤ Click on the calculator icon (1). The *Recalculate* button appears.

➤ Click on *Recalculate*. (2)

▶ The value is recalculated.

The screenshot shows a 'Project Estimates' form with the following fields and values:

Field	Value
% Complete	31
Start Date	* 06.02.2025
Finish Date	08.12.2027
Total Budget	15.000,00 €
Last updated:	27.03.2025 06:47
Total Forecast	15.500,00 €
Last updated:	27.03.2025 06:47
Total Actual	10.500,00 €
Last updated:	27.03.2025 06:47
Last Timesheet Rollup	

A red box highlights the 'Recalculate' button, which is labeled with a red '2'. A red '1' is also present next to the 'Total Budget' field.


- *Last Timesheet Rollup*: Last summary of the time confirmations of all project members. This field is updated automatically.

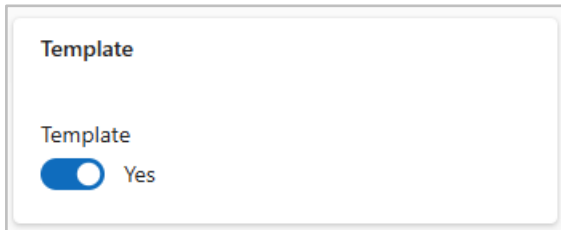
▶ Data records can be found under *Timesheets*. (see [Navigation Bar](#) ¹⁷)

4.4 Template

In the *Template* area, you can save the current project as a template to use it as a template for other projects.











▶ The slider is set to *No* by default.

- Click on the *Template* slider. ▶ The slider jumps to *Yes*.
- Click on *Save* in the **command bar** .
- ▶ The project is saved as a template.



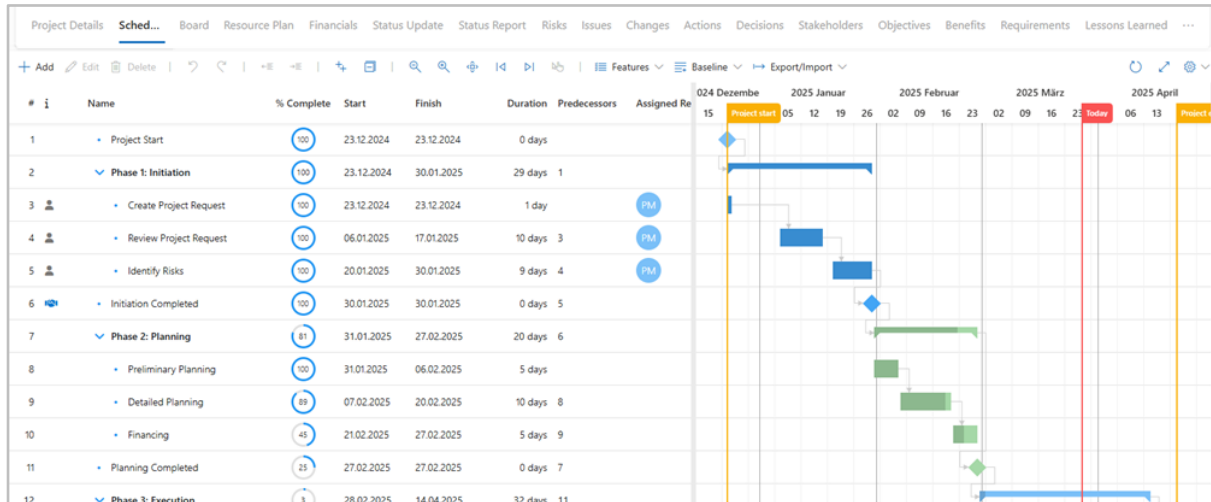
5 Task planning in the Schedule

In this chapter, you will learn how to plan and manage processes in the TPG Scheduler. We will guide you through the process step by step:

- **Scheduler**  33
- **Create Task**  43
- **Move Task**  45
- **Undo and Redo Actions**  45
- **Define Duration of Task**  46
- **Convert Task to Milestone**  47
- **Define dependencies between Tasks**  48
- **Assign Task Attributes**  55
- **Create and edit Inter-Project Links**  69
- **Ressource Planning**  77

5.1 Schedule - Views

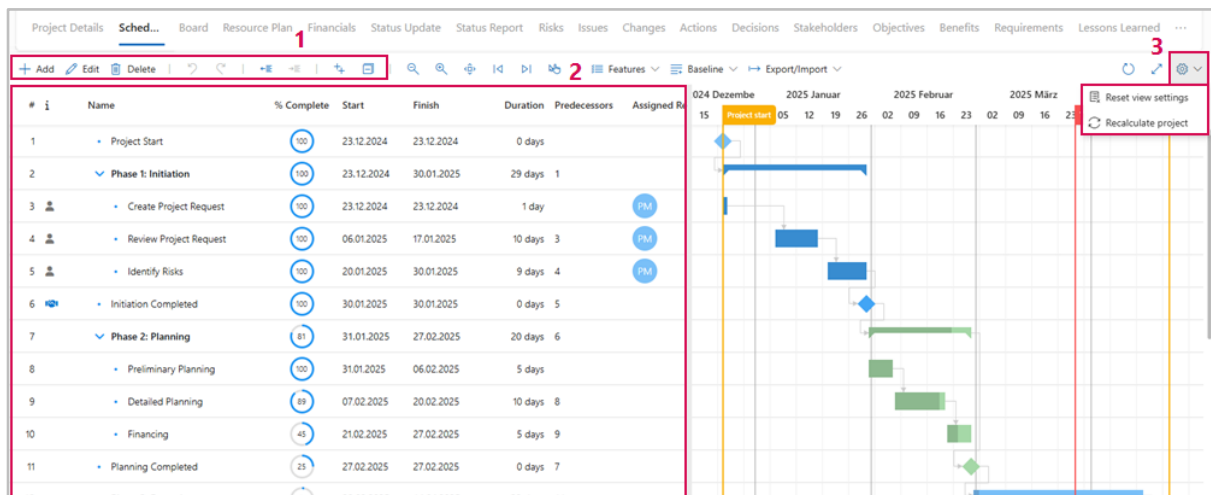
Task planning and resource allocation take place on the *Schedule* tab. TPG Scheduler provides a tabular (left) and graphical (right) overview of the project:



► You can customize your display settings. These settings will be saved.

Tabular view and functions:

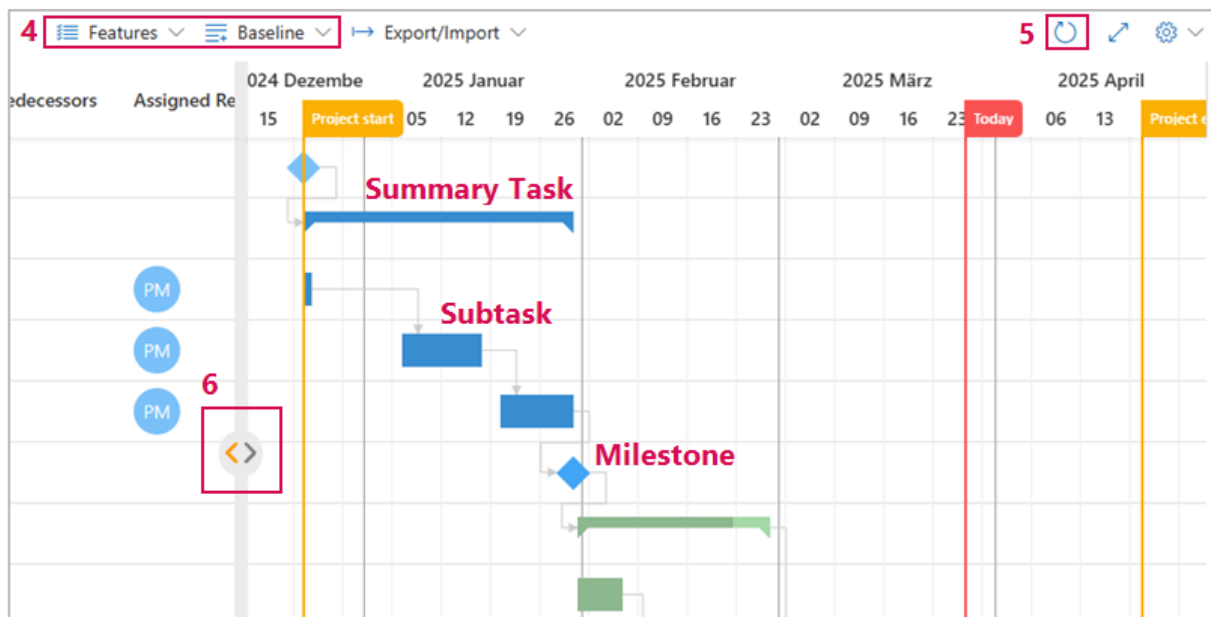
- Buttons for adding, editing, hiding and displaying tasks (1)
- Listing, properties and editing of tasks (2)
- Restoration of the standard display and immediate recalculation of the project (3)



Graphical View as Gantt Chart and Functions:

- Gantt Chart with summary tasks, subtasks, milestones, etc.
- Display options for Gantt Chart (4)
- Reload the schedule (5)
- Switch views (6)
 - Click on the right arrow ► table view only
 - Click on the left arrow ► chart view only

► The divider can be moved left or right by holding down the left mouse button.



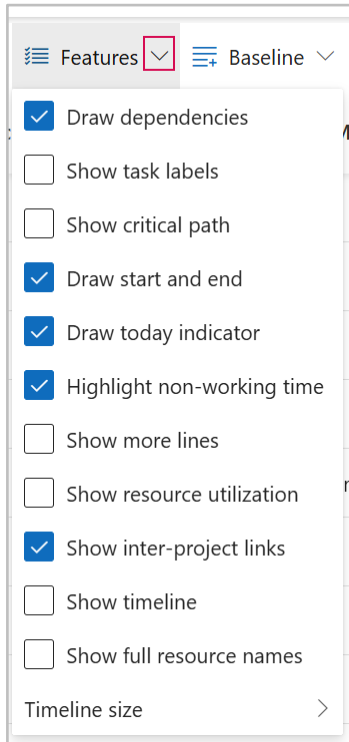
5.1.1 Schedule - Buttons

Above the tabular and graphical view of the tasks is a command line with buttons that you can use to customize the view.

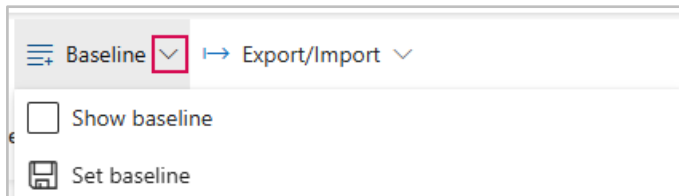


- **Add (1):** Add a new task.
- **Edit (2):** Edit task.
- **Delete (3):** Delete task.
- **Undo last action and Redo last undone action. (4)** (see [Undo and Redo Actions](#) ⁴⁵)
- **Outdent task or Indent task (5):** Move task to another level.
- **Show all subtasks (6):** All subtasks are displayed in the tabular and graphical view.
- **Hide all subtasks (7):** All subtasks are hidden. Only the summary tasks and milestones are displayed in the tabular and graphical view.
- **Zoom out and Zoom in (8):** Zoom in or zoom out view in Gantt Chart
- **Zoom to fit full Gantt (9):** The entire project is displayed in the Gantt chart.
- **Scroll left and Scroll right (10):** Jump in the Gantt chart to the start or end of the project.
- **Scroll to selected task (11):** Selected task line is displayed.
- **Features (12):** Drop-down menu with features.
 - Click on the arrow. ► A drop-down menu opens.

- Click on the elements to be displayed in the *Schedule* tab.

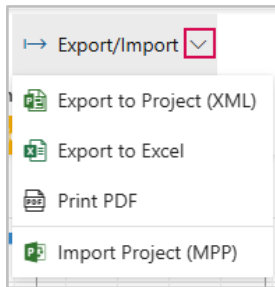


- **Baseline (13):** Display baseline or save the current status as a baseline.
- Click on the arrow. ► A drop-down menu opens.



- Click on *Show baseline*. ► The baseline is displayed in the Gantt chart.
- Or
- Click on *Baseline*. ► The current status is saved as a baseline.
 - **Export/Import (14):** Export project, print as PDF or import from another project.

- Click on the arrow. ► A drop-down menu opens.




- Select the desired action.
- Refresh, full screen mode or reset view settings and immediate recalculation of the project. (15)

5.1.2 Scheduler - Table

The tasks are listed in tabular form in the view on the left-hand side. The following applies:

- Row = a task
- Column = attributes of the task (e.g. *Name, Start, Finish, Duration, %Complete, etc.*)

The columns can be moved using drag & drop.

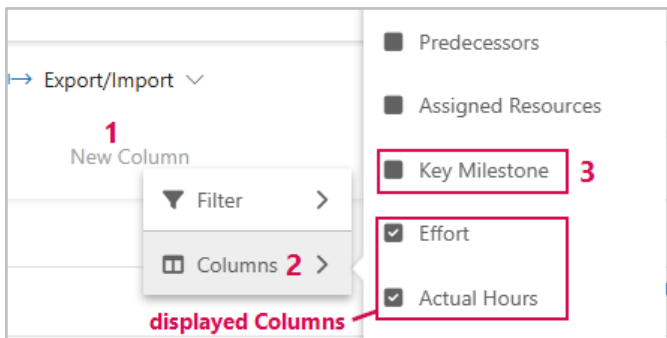
-
- A list of available columns can be found under **Task Attributes** 
-

Columns can be shown and hidden. There are 3 methods for showing columns:

Display multiple columns:

- Right-click on *New Column*. (1) ► The drop-down menu with *Filters* and *Columns* opens.
- Click on *Columns*. (2) ► A list of all columns opens. All displayed columns are marked with a check.
- Click on the columns to be displayed. (3)

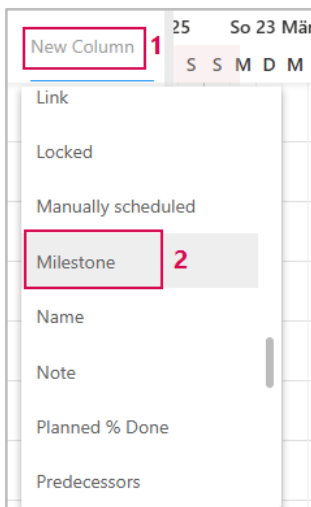
- ▶ Columns are displayed in the table.



Or

Selection via drop-down menu:

- Click on *New Column*. (1) ▶ The drop-down menu with attributes opens.
- Click on the desired column (e.g. Milestone). (2)
- ▶ Milestone column appears in the table.

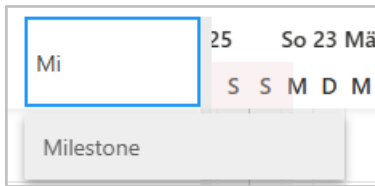


Or

Enter in text field:

- Click on *New Column*. ▶ The drop-down menu with attributes opens.
- Enter "Milestone" in the *New Column* field.

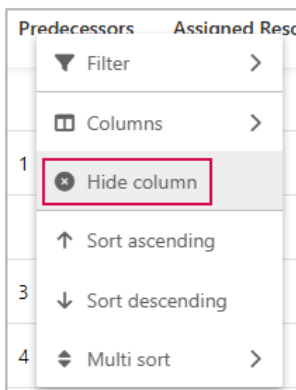
- ▶ Milestone column appears in the table.



-
- ▶ It may happen that not all columns are available for selection when you try to show columns. This depends on the configuration of the TPG Scheduler. If you cannot find the desired column, try another method to show columns.
-

Hide columns:

- Right-click on the column to be hidden. ▶ The drop-down menu opens.
- Click on *Hide column*.
- ▶ The column is hidden.



-
- ▶ Columns that you hide may no longer be displayed in the drop-down menu if you want to show them again. Reload the project. The column will then be displayed in the drop-down menu again.
-

5.1.3 Schedule - Gantt Chart

In the view on the right-hand side, the processes are displayed graphically in the form of a Gantt chart. By default, the *Project start* date, *Today's* date and the *Project end* date are marked on the timeline in the Gantt chart.



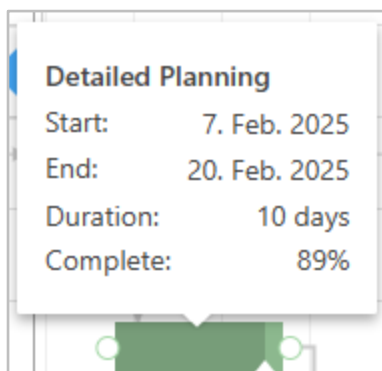
► The project tasks are placed one below the other on the timeline. (see [Scheduler - Views](#) ³³)

The tasks are visualized with various symbols:

Task	Symbol
Summary Task	
Subtask	
Milestone	

The dependencies between the tasks are visualized with arrows in the Gantt chart. (see [Define dependencies between Tasks](#)) ⁴⁸

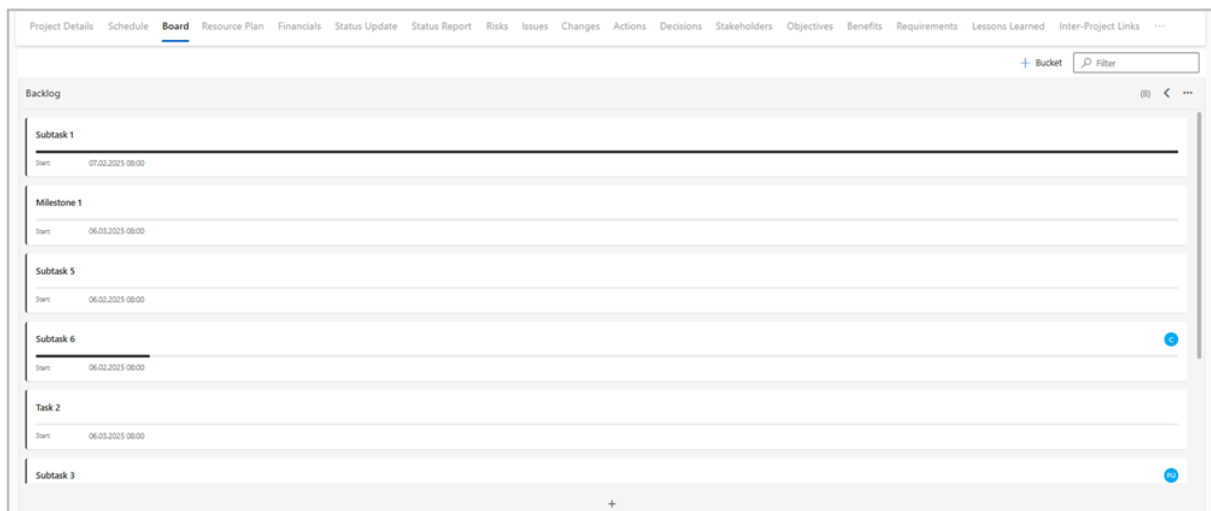
Move the mouse pointer over an operation to obtain information about it:



5.1.4 Board Tab

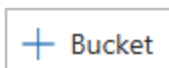
A Kanban board is integrated on the *Board* tab to display the tasks of a project. This Kanban board offers the option of dividing tasks into groups - the buckets - and organizing them.

By default, all tasks are in the bucket *Backlog*. You can add further buckets and move tasks into buckets.



Create Bucket:

- Go to the *Board* tab.
- Click on *Bucket*.



- Enter the name of the bucket. (e.g. *in Progress*)
- Click on *Add*.

Add bucket

Name

- ▶ A new bucket is created.

Move task to another bucket:

- Select the task you want to move to another bucket.
- Move the task using drag & drop.

Or

- Right-click on the task. ▶ A drop-down menu opens.
- Click *Change column*.
- Click on the desired bucket (e.g. *in Progress*).
- ▶ The task is moved to the desired bucket.



Further functions and editing options:

You will find further functions in the drop-down menu.

⚠ Warning: All functions affect the schedule. Deleting a task not only removes it from the bucket, but also from the schedule.

- *Edit item:* Edit task.
- *Resources:* Assign a resource to the task.
- *Remove item:* Delete task.

You can customize the view in the Kanban board for greater clarity. You can find a detailed explanation in the section [Actions - current Project](#)¹⁵⁰.

Show bucket in the schedule:

You can show the *Bucket* column in the *Schedule* (see [Task Attributes](#)^[55]). The bucket to which the task is assigned is displayed there. You can select a different bucket and assign the task to a different bucket.

Name	% Complete	Start	Finish	Duration	Predecessors	Assigned Reso...	Key Milestone	Effort	Actual Hours	Bucket
Task 1	51	06.02.2025	19.02.2025	10 days				236 hours		
• Subtask 1	100	07.02.2025	10.02.2025	2 days				16 hours		In Pro
• Subtask 2	100	11.02.2025	17.02.2025	5 days	2	D		20 hours		Done
• Subtask 3	70	11.02.2025	19.02.2025	7 days	355	PU		56 hours		In Progress

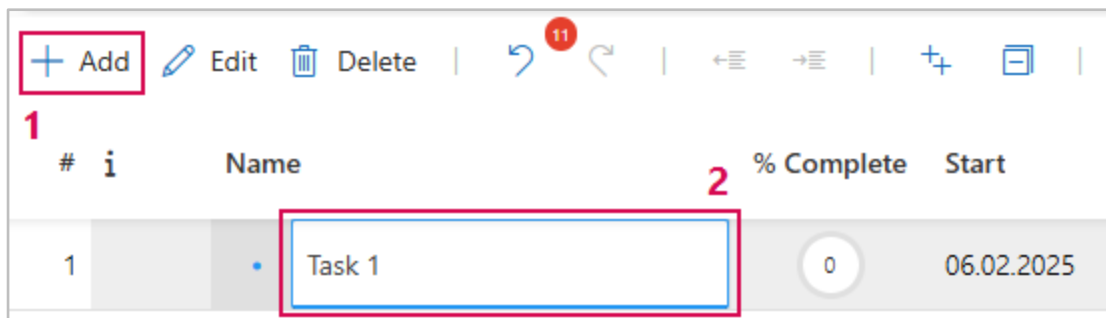
5.2 Create Task

The tasks for the project are created in the *Schedule*.

The following describes how to create new tasks, tasks on the same level, tasks above and below, subtasks and milestones.

Create new task:

- Click on the *Add* button. (1) ► A new task is created.
- Enter the task name (2) and confirm with the Enter button.



Insert task on the same level:

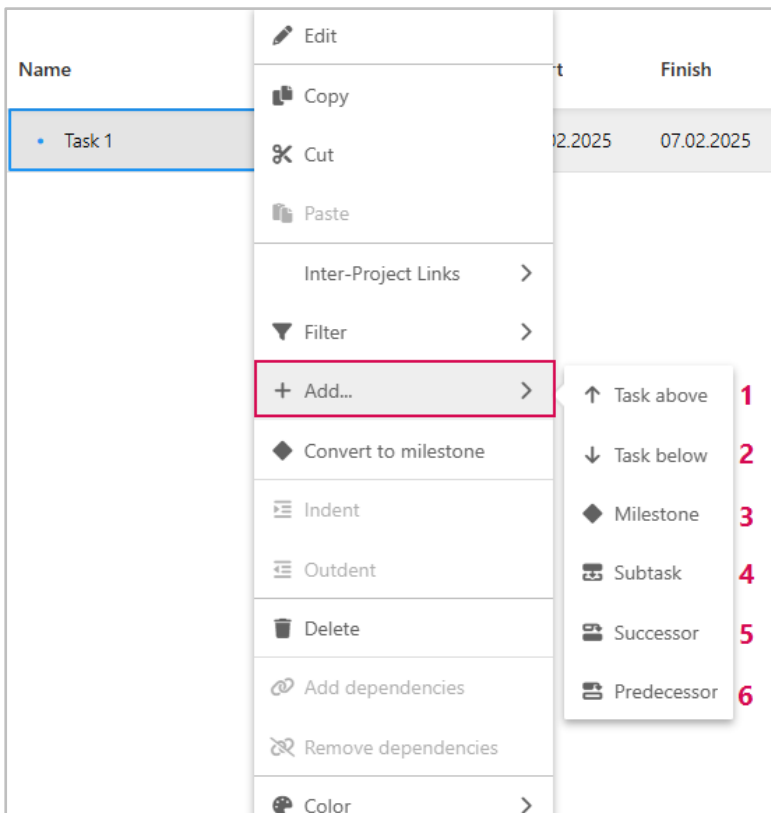
Repeat the process described above to create a task on the same level.

- Click on the *Add* button. ► A new task is created.
- Enter the task name and confirm with the Enter key.

Add further tasks and milestones:

Further tasks and milestones are added via the drop-down menu:

- Right-click on a task. ▶ The drop-down menu opens.
- Click on *Add*. You can create further tasks and milestones:
 - Click on *Task above*. (1) ▶ Task on the same level is inserted.
 - Click on *Task below*. (2) ▶ Task on the same level is inserted.
 - Click on *Milestone*. (3) ▶ Milestone is inserted at the same level.
 - Click on *Subtask*. (4) ▶ Task at next lower level is inserted.
 - Click on *Successor*. (5) ▶ Task that follows the current task is inserted.
 - Click on *Predecessor*. (6) ▶ Task that precedes the current task is inserted.



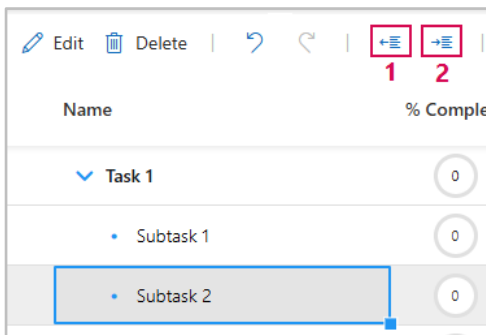
5.3 Move Task

- ▶ The order of the tasks can be changed using drag & drop.

Move task to another level:

You can use the *Outdent task* up and *Indent task* down buttons to move tasks to other levels.

- Click on the task that you want to move to another level.
- Click on *Outdent task*. (1) ▶ Task is moved to a higher level.
- Click on *Indent task*. (2) ▶ Task is moved down one level.



5.4 Undo and Redo Actions

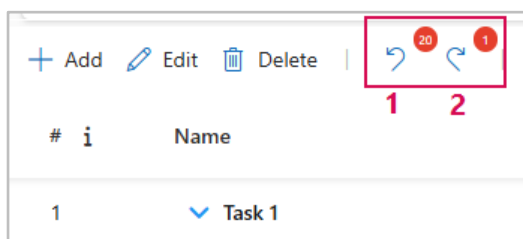
Last actions can be undone and redone using the buttons with the curved arrows.

Undo action:

- Click on the left-curved arrow. (1) ▶ The last action is undone.

Redo action:

- Click on the right-curved arrow. (2) ▶ The last undone action is redone.



5.5 Define Duration of Task

You can define the duration of a process in the *Duration* column. The duration is specified in days. By default, the duration of a newly created task is 1 day.

#	i	Name	Duration	% C
1		Task 1	15 days	
2		• Subtask 1	2 days	
3		• Subtask 2	2 days	
4		• Subtask 3	2 days	
5		• Subtask 4	2 days	
6		• Subtask 5	2 days	
7		• Subtask 6	15 days	
8		• Milestone 1	0 days	

- Select the task for which you want to set the duration.
- Double-click the cell in the *Duration* column. ▶ You can now enter text in the cell.
- Enter the estimated duration in days.

▶ The duration of a summary task is calculated automatically as soon as the dependency is defined (see [Define dependencies between Tasks](#) ⁴⁸).

▶ The end date of the task in the *Finish* column is calculated automatically.

By default, the duration is specified in the unit “days”. You can specify the duration of a task in a different unit. The following units are supported:

Unit	Abbreviation
day	d
week	w
year	y

Change unit for duration:

- Select the task for which you want to change the unit of duration.
- Double-click on the cell in the *Duration* column. ▶ Text can now be entered in the cell.
- Enter the expected duration in weeks (w) or years (y).

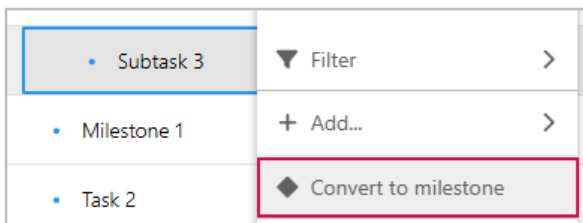
▶ You can enter the unit or the abbreviation.

5.6 Convert Task to Milestone

You can convert an task into a milestone.

There are 3 options for converting a task into a milestone.

1. In the *Duration* column, set the duration to 0.
2. Select *Convert to milestone* from the drop-down menu.
 - Right-click on the task that you want to convert into a milestone. ▶ The drop-down menu opens.
 - Click on *Convert to milestone*. ▶ The task is converted into a milestone.

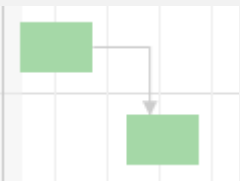
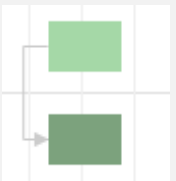
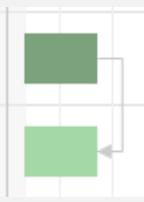
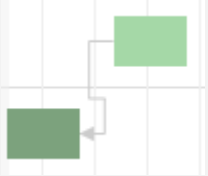


3. Show the *Milestone* column (see [Schedule - Table](#)³⁷⁾) and activate the checkbox.

#	i	Name	Duration	Milestone
1		Task 1	4 days	<input type="checkbox"/>
2		Subtask 1	2 days	<input type="checkbox"/>
3		Subtask 2	2 days	<input type="checkbox"/>
4		Subtask 3	2 days	<input type="checkbox"/>
5		Milestone 1	0 days	<input checked="" type="checkbox"/>

5.7 Define dependencies between Tasks

You can create dependencies between tasks. The dependencies can be created either in the table or in the Gantt chart. There are 4 different dependency relationships:

Dependency	Explanation	Graphic
FS (Finish-to-Start)	The task starts when the predecessor is finished (normal sequence).	
SS (Start-to-Start)	The task starts only when the predecessor also starts (start sequence).	
FF (Finish-to-Finish)	The task ends when the predecessor is finished (end sequence).	
SF (Start-to-Finish)	The task ends only when the predecessor starts (jump sequence).	

5.7.1 Define dependencies between Tasks - Table

In the table view, there are various options for defining dependencies between tasks.

FS relationship:

- Select the task to which you want to assign a predecessor (e.g. Subtask 2).
- Double-click in the cell in the *Predecessor* column. (1)
- Click on the down arrow. ▶ The drop-down menu opens.
- In the drop-down menu, click on the task that you want to define as the predecessor (e.g. Subtask 1). (2)
- Click outside the menu to exit.
- The two tasks are linked with a finish-to-start relationship.
- ▶ Subtask 2 only starts when subtask 1 has been completed.

#	i	Name	% Complete	Start	Finish	Predecessors	Duration	Ass
1		Task 1	35	06.02.2025	26.02.2025		15 days	
2		Subtask 1	100	07.02.2025	10.02.2025		2 days	
3		Subtask 2	100	11.02.2025	12.02.2025	2	2 days	
4		Subtask 3	70	11.02.2025	12.02.2025			
5		Subtask 4	50	11.02.2025	12.02.2025			
6		Subtask 5	40	07.02.2025	11.02.2025			
7		Subtask 6	10	06.02.2025	26.02.2025			

		Filter
		Subtask 5 (6) <input type="checkbox"/>
		Subtask 6 (7) <input type="checkbox"/>
		Subtask 1 (2) <input checked="" type="checkbox"/>
		Subtask 4 (5) <input type="checkbox"/>

Or

- Enter the number of the task to be assigned as the predecessor in the *Predecessor* column.

#	i	Name	% Complete	Start	Finish	Predecessors
1		Task 1	35	06.02.2025	26.02.2025	
2		Subtask 1	100	07.02.2025	10.02.2025	
3		Subtask 2	100	11.02.2025	12.02.2025	2

Define SS, FF and SF relationship:

To define the other dependencies, proceed as follows:

- Select the task to which you want to assign a dependency to another task.
- Double-click in the *Predecessor* column.
- Enter the number of the operation that you want to relate to the current task and enter the dependency SS, FF or SF.
- ▶ The two tasks are linked to the desired dependency.

#	i	Name	Start	Finish	Predecessors
1		Task 1	06.02.2025	26.02.2025	
2		Subtask 1	07.02.2025	10.02.2025	
3		Subtask 2	11.02.2025	12.02.2025	2
4		Subtask 3	11.02.2025	12.02.2025	3SS
5		Subtask 4	11.02.2025	12.02.2025	4FF
6		Subtask 5	07.02.2025	11.02.2025	5SF

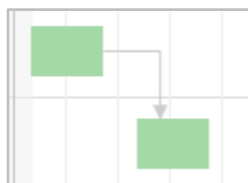
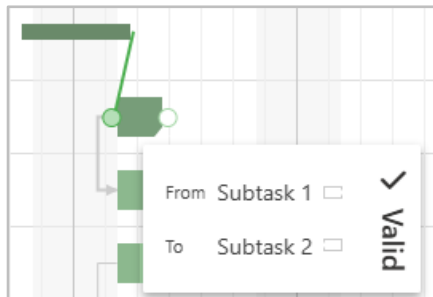
- ▶ Alternatively, you can show the *Successor* column and define the subsequent task as described above.

5.7.2 Define dependencies between Tasks - Gantt Chart

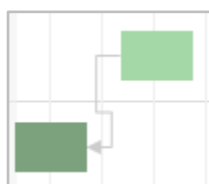
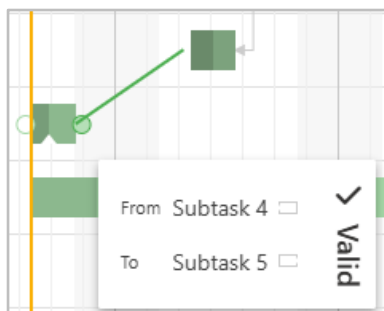
You can define dependencies between tasks in the Gantt chart view.

- Hold down the mouse button and connect the ends of the task bars.
- ▶ The two tasks are linked with the desired dependency.

Example 1: FS relationship



Example 2: SF relationship



5.7.3 Define dependencies between Tasks - Information Window

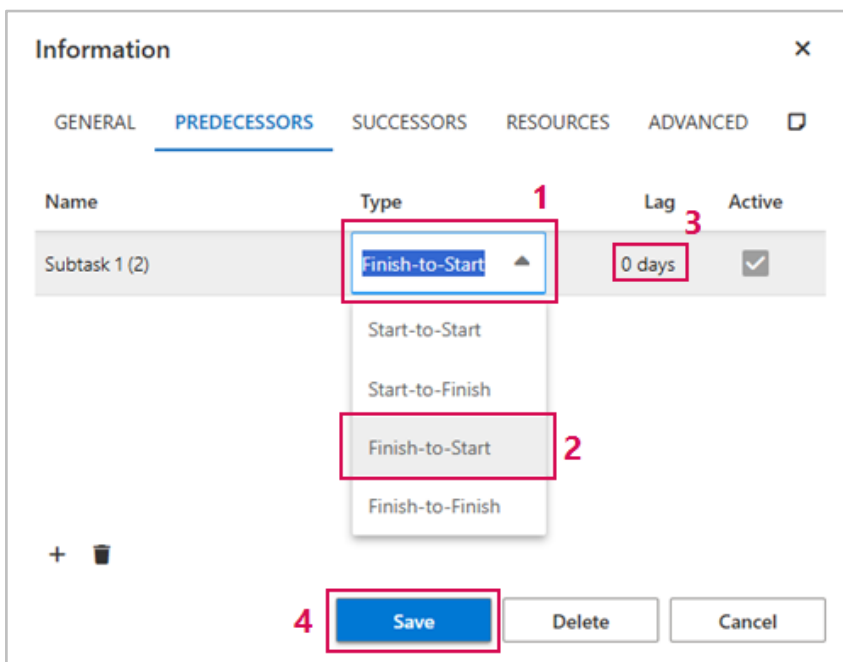
In the information window of a task, you can change the dependency types and insert a lag between two tasks.

There are 2 ways to open the *information window*.

- In the table, click on the task you want to edit.
- Click on *Edit*. ► The *information window* opens.

Or:

- Double-click on the task bar in the Gantt chart. ► The *information window* opens.
- Click on the *Predecessor* or *Successor* tab - depending on the relationship you want to edit.
- Click on the *Type* field. (1) ► The drop-down menu opens.
- Click on the desired dependency. (2)
- Click on the *Lag* field. (3)
- Enter the number of days.
- Click on *Save*. (4)
- The dependency between two tasks is changed and a lag is inserted.



Dependencies between tasks can also be changed via the *Edit dependency* window.

- Double-click on the dependency arrow in the Gantt chart. ▶ The *Edit dependency* window opens.
 - Click on the *Type* field. (1) ▶ The drop-down menu opens.
 - Click on the desired dependency.
 - Click on the *Lag* field. (2)
 - Enter the number of days.
 - Click on *Save*. (3)
- ▶ The dependency between two tasks is changed and a lag is inserted.

Edit dependency X

From
Subtask 1

To
Subtask 2

Type
End to Start 1

Lag
0 days 2

Active 3

Save Delete Cancel

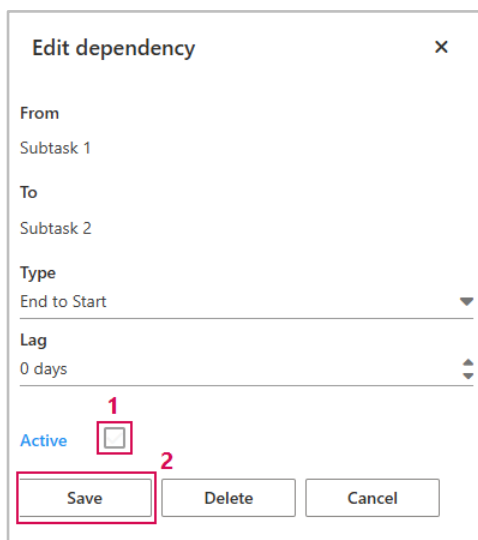
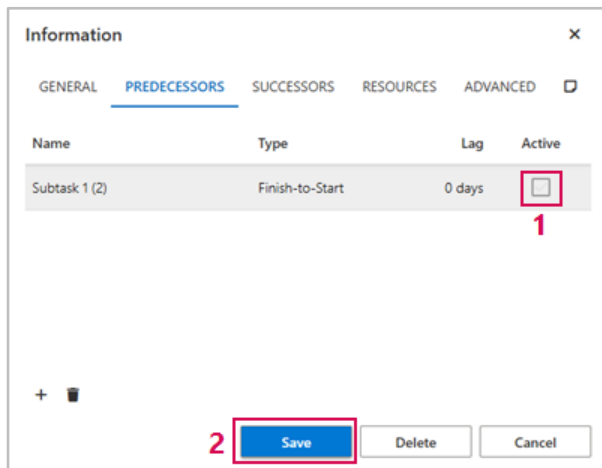
5.7.4 Deactivate dependencies between Tasks

To deactivate a dependency between two tasks without deleting the dependency, proceed as follows:

- Open the information window of one of the two tasks. (see [Define dependencies between operations - Information Window](#) ⁵²)
- Click on the *Predecessor* or *Successor* tab - depending on the relationship you want to edit.

Or

- Double-click on the dependency arrow in the Gantt chart. ► The *Edit dependency* field opens.
- Click on the *Active* checkbox. (1) ► The checkbox is deactivated.
- Click on *Save*. (2)






5.8 Task Attributes

You can use the column options to assign attributes to each task. Various options are available.

The following columns are displayed by default after project creation:

#	i	Name	% Complete	Start	Finish	Duration	Predecessors	Assigned Resources	Key Milestone	Effort	Actual Hours	Actions	New Column
---	---	------	------------	-------	--------	----------	--------------	--------------------	---------------	--------	--------------	---------	------------

- **#** (number of the task line): Unique number assigned to each task in the project plan.
- **i**: Information on the task in the form of symbols, e.g. Assigned Resources  or Key Milestone Customer 
- **Name**: Name of the task.
- **%Complete**: Progress of the task. Percentage of how much of the task has already been completed . (see [Progress Indicator](#) ⁶⁷)
- **Start**: Start date of the task.
- **Finish**: End date of the task.
- **Duration**: Total time required to complete the process. Specified in days. (see [Define Duration of Task](#) ⁴⁶)
- **Predecessor**: Task that must precede the current task. The cell contains the number of the predecessor task line.
- **Assigned Resources**: Resources that are assigned to the task, e.g. people or departments. (see [Assign Resources in the Schedule](#) ⁷⁷)
- **Key Milestone**: Important event or goal in the project.
- **Effort**: Estimated amount of work required for the task. Specified in hours.
- **Actual Hours**: Actual hours worked to complete the task.
- **Actions**: Actions that must be completed during the execution of the task. (see [Actions](#))

#	i	Name	% Complete	Start	Finish	Duration	Predecessors	Assigned Resources	Key Milestone	Effort	Actual Hours	Actions	New Column
1		Project Start	100	23.12.2024	23.12.2024	0 days				0 hours			
2		Phase 1: Initiation	100	23.12.2024	30.01.2025	29 days	1			160 hours			
3		Create Project Request	100	23.12.2024	23.12.2024	1 day		PM		8 hours			
4		Review Project Request	100	06.01.2025	17.01.2025	10 days	3	PM		80 hours			
5		Identify Risks	100	20.01.2025	30.01.2025	9 days	4	PM		72 hours			
6		Initiation Completed	100	30.01.2025	30.01.2025	0 days	5		Customer	0 hours			
7		Phase 2: Planning	81	31.01.2025	27.02.2025	20 days	6			24.5 hours	15		
8		Preliminary Planning	100	31.01.2025	06.02.2025	5 days				8 hours		0.71	
9		Detailed Planning	89	07.02.2025	20.02.2025	10 days	8			8.5 hours			
10		Financing	45	21.02.2025	27.02.2025	5 days	9			8 hours			
11		Planning Completed	25	27.02.2025	27.02.2025	0 days	7			0 hours			

Further columns or task attributes:

Columns	Description
<i>Start Variance</i>	<p>Difference between the planned and the actual start date of the task.</p> <p>Positive variance = task starts later than planned</p> <p>Negative variance = task starts earlier than planned</p>
<i>Finish Variance</i>	<p>Difference between the planned and the actual end date of the task.</p> <p>Positive variance = task ends later than planned</p> <p>Negative variance = task ends earlier than planned</p>
<i>Bucket</i>	<p>Group in which tasks can be collected and organized on the <i>Board</i> Tab. (see Board Tab ⁴¹)</p>
<i>Duration Variance</i>	<p>Difference between the planned and actual duration of a task.</p> <p>Positive variance = actual duration is longer than planned duration</p>

Columns	Description
	Negative variance = actual duration is shorter than planned duration
<i>Effort Unit</i>	Unit in which the effort for the task is specified e.g. hour.
<i>Constraint Type</i>	Assign a constraint to the task: <i>As soon as possible, As late as possible, Must start on, Must finish on, Start no earlier than, Start no later than, End no earlier than, End no later than</i>
<i>Constraint Date</i>	Assign the date (day) for the constraint type to the task.
<i>Color</i>	Color of the task bar
<i>Early Start</i>	The earliest date on which a task is allowed to start.
<i>Early End</i>	The earliest date on which a task is allowed to finish.
<i>Baseline Duration</i>	Planned total time required to complete the task, specified in days.
<i>Baseline Start</i>	Scheduled time at which the task starts.
<i>Baseline Finish</i>	Scheduled time at which the task ends.
<i>Total Slack</i>	Total period provided as a buffer.
<i>Locked</i>	Task cannot be edited or moved.
<i>Inactive</i>	Task is deactivated (see Deactivate Task ⁶⁶)
<i>Calender</i>	Assign task to a calendar. (see Set Calender for a Task ⁶³)
<i>Link</i>	Link between tasks or projects. Hardlink = A hardlink is a fixed and direct connection between two tasks or projects.

Columns	Description
	Changes to a task or project are immediately transferred to the linked tasks or projects. Softlink = A soft link is a flexible connection that refers to the path or position of another task or project. If the original task or project is changed or deleted, the soft link can become a broken link.
<i>Manually scheduled</i>	Plan the task manually. The start date, finish date and duration are set by the project manager.
<i>Milestone</i>	Event in the project e.g. completion of a project phase.
<i>Successor</i>	Task that follows the current task. The cell contains the number of the operation line of the successor.
<i>Note</i>	Comments on the task (see Add Note ⁶⁸)
<i>WBS</i>	Work Breakdown Structure, hierarchical representation of all content levels of a project.
<i>Scheduling Mode</i>	Mode for scheduling tasks within a project. There are three scheduling modes: <i>Fixed Duration</i> , <i>Fixed Effort</i> , <i>Fixed Units</i> . (see Define Scheduling Mode ⁶²)
<i>Scheduling Direction</i>	Method used to structure the scheduling of a project: <i>Forward</i> or <i>Backward</i>
<i>Priority</i>	Importance and urgency of a task: <i>Urgent</i> , <i>High</i> , <i>Medium</i> , <i>Low</i>
<i>Ignore Resource Calendar</i>	The calendar of the assigned resource is not considered when scheduling a task.
<i>Rollup</i>	Display subtasks and milestones in the Gantt chart directly under the bar of the higher-level summary task. (see Create Rollup ⁶⁴)
<i>Sequence</i>	The order in which tasks are performed.
<i>Deadline</i>	Time (date) by which the task/milestone must be completed.
<i>Late Start</i>	Latest time (date) at which a task may start.

Columns	Description
<i>Late End</i>	Latest time (date) at which a task may end.
<i>Todos</i>	Jobs that need to be completed within the task.
<i>Show in timeline</i>	The task is displayed in the timeline above the table and the Gantt chart. Timeline must be shown. (see Schedule - Buttons ³⁵)

► The columns and task attributes listed are available to you in the TPG Scheduler. It is possible to add further columns and modify the TPG Scheduler to meet your specific requirements. Please contact your administrator or TPG Support for more information.

Assign task attributes:

- Show the desired column (see [Schedule - Table](#) ³⁷)
- Fill in the cells as described in the following chapters.

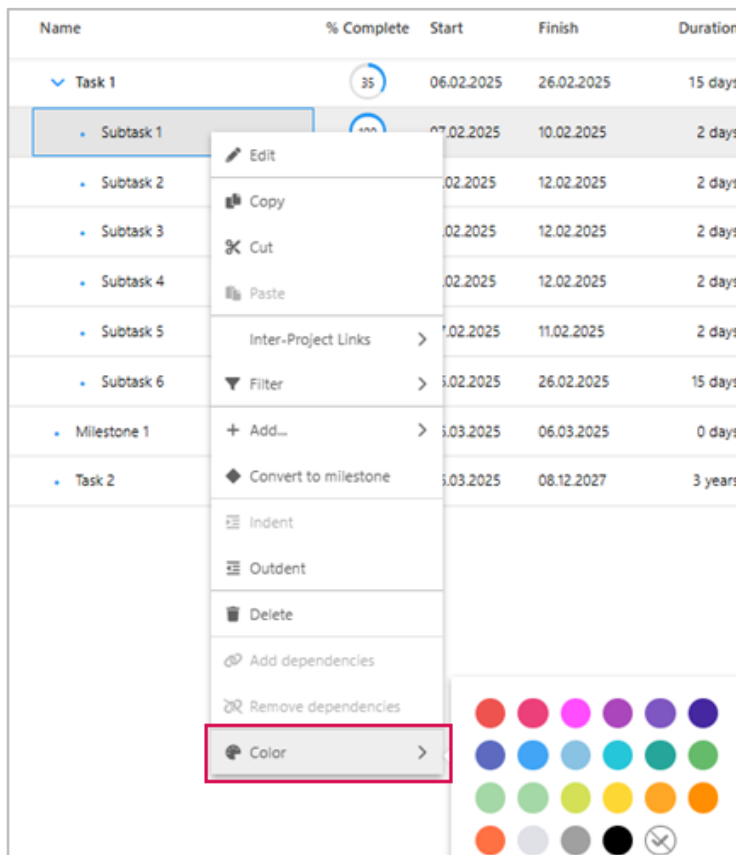
5.8.1 Change color of Task bar

To highlight tasks in the TPG Scheduler, you can select colors for the task bars.

Change the color of task bars:

➤ Right-click on the task in the table or the task bar in the Gantt chart. ► The drop-down menu opens.

➤ Click on *Color*. ► The color palette opens.



➤ Click on the desired color in the color palette.

► The color of the task is changed.

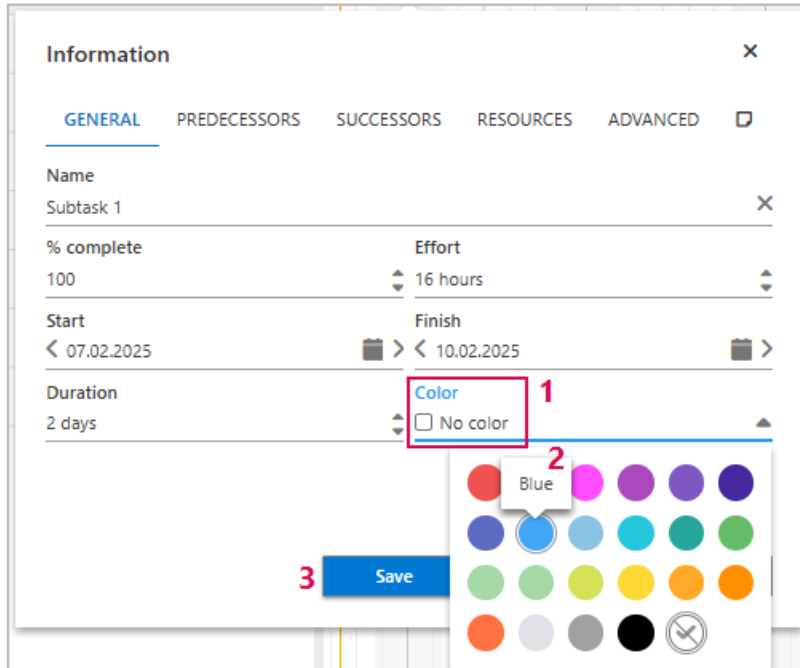
Or

➤ Open the information window of the task. (see [Define dependencies between tasks - Information Window](#) ⁵²)

➤ Click on the *Color* field. (1) ► The color palette opens.

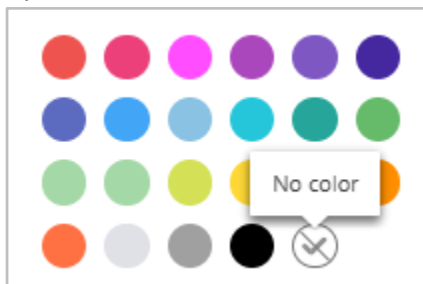
➤ Click on the desired color in the color palette. (2)

➤ Click on *Save*. (3)



▶ The color of the task is changed.

▶ If you want to reset the color to the default setting, select *No color* in the color palette.



▶ The color selected for a summary task is also applied to the subtasks.

▶ You can assign a different color to subtasks by defining a different color for individual tasks. To do this, proceed as described above.

5.8.2 Define Scheduling Mode

When scheduling a task in the TPG Scheduler, the work is calculated from 3 variables: *Duration*, *Units* and *Effort*. This means:

Work = Duration * Units * Effort

In order to plan a task realistically, there are 3 planning modes that can be defined for a task in the TPG Scheduler. One variable is defined for each planning mode:

- Fixed Duration = duration of the task remains constant.
- Fixed Units = number of assigned resources remains constant.
- Fixed Effort = number of working hours/days remains constant.

Define scheduling mode:

- Show the *Scheduling Mode* column. (see [Schedule - Table](#) ³⁷)
- Click in the *Scheduling Mode* cell during the task. ▶ The drop-down menu opens.
- Click on the desired scheduling mode *Fixed Duration*, *Fixed Units* or *Fixed Effort*.
- ▶ The desired scheduling mode is defined for the task.

- ▶ The default setting for the scheduling mode is *Fixed Duration*.
- ▶ As soon as a resource is assigned to a task, the TPG Scheduler calculates an effort of 8 hours per day and resource.

If a scheduling mode (e.g. Fixed Duration) is selected, the other variable (e.g. Units) is recalculated when one variable (e.g. Effort) is changed. The variables are related as follows:

Change of ...	Number of Assigned Resources	Duration	Effort
Scheduling Mode	leads to the recalculation of		
Fixed Duration	Effort	Effort	Units 1
Fixed Units	Effort 2	Effort	Duration
Fixed Effort	Duration	Units 3	Duration

Example 1: Fixed Duration (5 days): Change of Effort (20 hours) leads to recalculation of Units (Assigned Resource: Developer 50%).

Example 2: Fixed Units (number of Assigned Resource): Change of Units (1 → 2) leads to recalculation of Effort (80 hours)

Example 3: Fixed Effort (56 hours): Change of Duration (10 days) leads to recalculation of Units (Assigned resource: Consultant 70%).

Duration	Assigned Resources	Scheduling...	Effort
10 days		Fixed Duration	236 hours
2	Developer 50%	Fixed Duration	16 hours
1 5 days	D	Fixed Duration	20 hours
7 days	C	Fixed Effort	56 hours
2 5 days	C D	Fixed Units	80 hours
2	Consultant 70%	Fixed Duration	8 hours
3 10 days	C	Fixed Effort	56 hours

5.8.3 Set Calendar for a Task

To calculate the task data, TPG Scheduler uses the calendar that is set on the *Project Details* tab in the project master data. The “Default” calendar is set by default. (see [Project Details General](#) ²⁶)

Enterprise Project Type * Default Project Type ×

Calendar * Default ×

It is possible to use a different calendar for individual tasks.

- ▶ Calendars can be configured by an administrator in the *Settings* area.

Set task calendar for individual tasks:

- Show the *Calendar* column. (see [Schedule - Table](#)³⁷)
- In the task row, click on the cell in the *Calendar* column.
- Click on the arrow on the right in the cell. ▶ The drop-down menu opens.
- Click on the desired calendar.
- ▶ A task calendar for a single task is set.

Name	% Complete	Start	Finish	Duration	Calendar ↓	Predeces
Task 1	53	06.02.2025	19.02.2025	10 days		
• Subtask 1	100	07.02.2025	10.02.2025	2 days	▲	
• Subtask 2	100	11.02.2025	17.02.2025	5 days	Default	
• Subtask 3	70	11.02.2025	19.02.2025	7 days	Monday to Thursday	
• Subtask 4	50	13.02.2025	19.02.2025	5 days	Half Day Workweek	

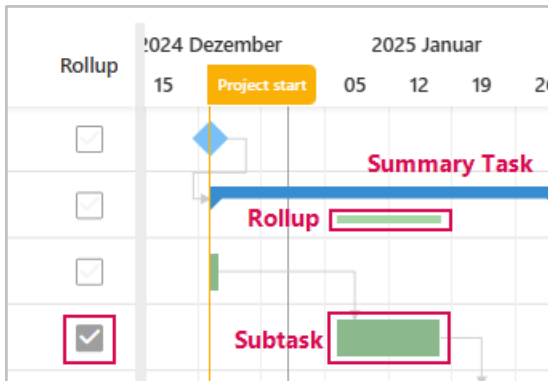
- ▶ If a calendar is changed, the finish date of the task is adjusted. The nominal duration remains unchanged. The effort is calculated at 8 hours per day, regardless of the daily working hours defined in the calendar.

5.8.4 Create Rollup

In the TPG Scheduler, you can display subtasks in the Gantt chart directly below the bar of the higher-level summary task:

- Show the Rollup column. (see [Schedule - Table](#)³⁷) ▶ Checkboxes appear in the task rows.
- Click on the checkbox of the subtask in the *Rollup* column.

- ▶ The subtask appears directly below the parent task in the Gantt chart.



Or


- Open the information Window of the task. (see [Define dependencies between Tasks - Information Window](#))
- Click on the *Advanced* tab. (1)
- Click on the *Rollup* checkbox. (2)
- Click on *Save*. (3)

- ▶ The subtask appears directly below the higher-level Summary Task in the Gantt chart.

The 'Information' window is open, showing the 'ADVANCED' tab. The 'Rollup' checkbox is checked. The 'Save' button is highlighted. Red numbers 1, 2, and 3 indicate the steps: 1 points to the 'ADVANCED' tab, 2 points to the 'Rollup' checkbox, and 3 points to the 'Save' button.

5.8.5 Deactivate Task

You can deactivate tasks in the TPG Scheduler. Proceed as follows:

- Show the *Inactive* column. (see [Schedule - Table](#) ³⁷)  Checkboxes appear in the task rows.
- Click on the checkbox of the task in the *Inactive* column.
- ▶ The task is crossed out in the table view and the task bar is colored gray in the Gantt chart.

Name	Inactive
▼ Task 1	<input type="checkbox"/>
• Subtask 1	<input type="checkbox"/>
• Subtask 2	<input checked="" type="checkbox"/>
• Subtask 3	<input type="checkbox"/>



Or

- Open the information window of the task. (see [Define dependencies between Tasks - Information Window](#) ⁵²)
- Click on the *Advanced* tab. (1)
- Click on the *Inactive* checkbox. (2)
- Click on *Save*. (3)
- ▶ The task is crossed out in the table view and the task bar is colored gray in the Gantt chart.

Information ✕

GENERAL PREDECESSORS SUCCESSORS RESOURCES **ADVANCED** ☐

Calendar

Default calendar ▼ Ignore resource calendar ☐

Scheduling mode ▼ Effort driven ☐

Fixed Duration

Constraint type ▼ Rollup ☐

Start no earlier than ✕

Constraint date 📅 Inactive 2

08.02.2025

Manually scheduled ☐

3 Save Delete Cancel

5.8.6 Progress Indicator

You can specify the percentage of completion for each task using the progress indicator. The progress indicator is found in the *%Complete* column. This column is displayed by default.

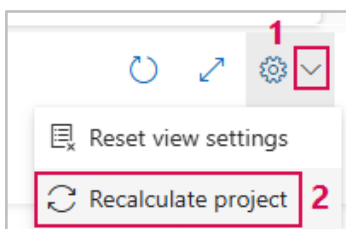
- Select the task to which you want to assign a progress.
- Double-click the *%Complete* cell.
- Enter the progress percentage in the field.
- ▶ The percentage of progress will be displayed.

-
- ▶ The percentage is calculated automatically for summary tasks.
-

Name	% Complete
▼ Task 1	53
• Subtask 1	100
• Subtask 2	100
• Subtask 3	70
• Subtask 4	50
• Subtask 5	45
• Subtask 6	10

Recalculate total project progress:

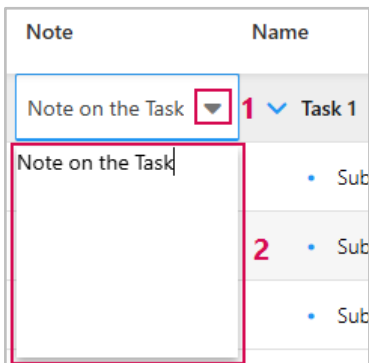
- Click on the down arrow on the right-hand side of the screen. (1) ▶ The drop-down menu opens.
- Click on *Recalculate project*. (2)
- ▶ The total project progress is recalculated.



5.8.7 Add Note

You can add notes to a task in the TPG Scheduler.

- Show the *Note* column. (see [Schedule - Table](#) ³⁷)
- Select the task to which you want to assign a note.
- Double-click on the cell in the *Note* column.
- Click on the arrow in the cell. (1) ▶ The note field opens.
- Enter the note for the task. (2)
- Click outside the note field to end the note.
- ▶ The note is added.



Or

- Open the information window of the task. (see [Define dependencies between Tasks - Information Window](#) ⁵²)
- Click on the pictogram on the right. (1)
- Enter the note in the text field. (2)
- Click on *Save*. (3)

▶ The note is added.

The screenshot shows a dialog box titled "Information" with a close button (X) in the top right corner. Below the title bar are five tabs: "GENERAL", "PREDECESSORS", "SUCCESSORS", "RESOURCES", and "ADVANCED". A red box labeled "1" highlights a blue square icon with a white "D" inside, located to the right of the "ADVANCED" tab. Below the tabs is a text area labeled "Note on the Task" with a red box labeled "2" around the text. At the bottom of the dialog, there are three buttons: "Save" (highlighted with a red box labeled "3"), "Delete", and "Cancel".

5.9 Inter-Project Links

For better coordination between projects, you can create soft links in TPG PPP between tasks of the current project and tasks of other projects.

This is possible on the *Schedule* and *Inter-Project Links* tabs.

The following section explains how to create inter-project links in the *Schedule*.

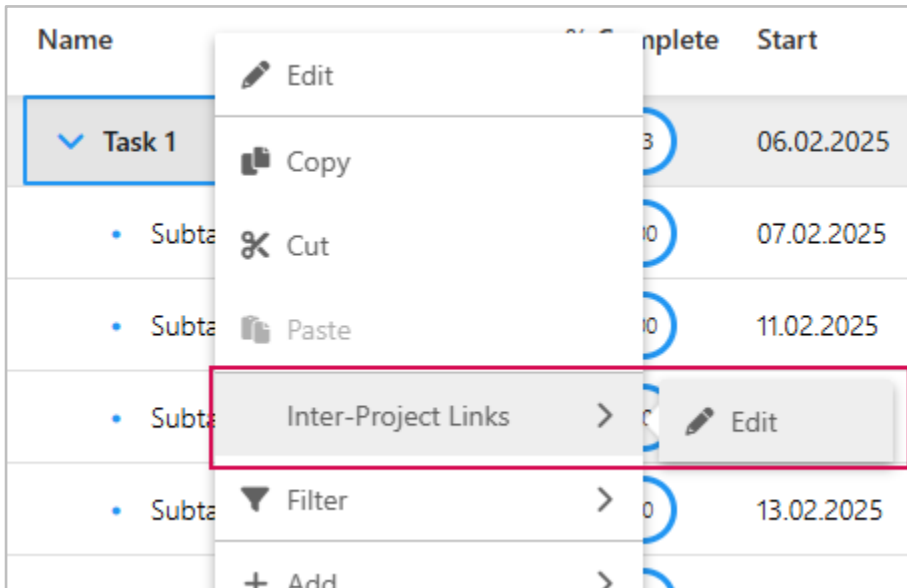
-
- ▶ Inter-project links created in the *Schedule* are also displayed on the *Inter-Project Links* tab and vice versa.
-

5.9.1 Create Inter-Project Links

You can create inter-project links on the *Schedule* tab as follows:

- On the *Schedule* tab, select the task you want to link.
- Right-click on the task. ▶ The drop-down menu opens.

➤ Select *Inter-Project Links* and click on *Edit*. ▶ The *Inter-Project Links* overview opens.



➤ Click on *Add*.

▶ The *Quick Create: Inter-Project Link* form appears.

The form is titled 'Quick Create: Inter-Project Link' and has a close button (X) in the top right. It is divided into several sections:

- Provider:** Project, Task, Relevant Date (all dropdown menus).
- Consumer (This Project):** Project (selected: 'Projekt XY'), Task (selected: 'Task 1'), Relevant Date (dropdown menu).
- General:** Buffer Indicator (selected: 'Green when provider is the earlier date'), Note (text input), Owner (selected: 'PPP Project Manager (Offline)').

At the bottom, there are two buttons: 'Save and Close' and 'Cancel'.

- Complete the *Quick Create: Inter-Project Link* form.

Provider = Project that provides information to the current project.

- Click in the *Project* field and select the provider project from the drop-down menu.
- Click in the *Task* field and select the task from the provider project from the drop-down menu.
- Click in the *Relevant Date* field and select *Start* or *Finish* from the drop-down menu.

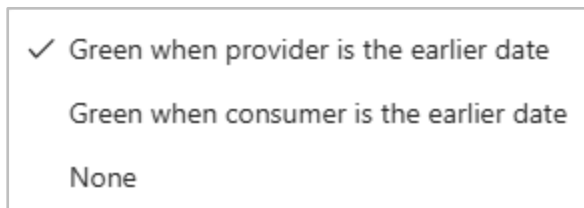
Consumer = Current project. Project that receives information from the provider project.

-
- ▶ The *Project* and *Task* fields are filled in automatically.

-
- Click in the *Relevant Date* field and select *Start* or *Finish* from the drop-down menu.

General

- Click in the *Buffer Indicator* field and select from the drop-down menu how the buffer should be displayed in the *Inter-Project Links* overview.



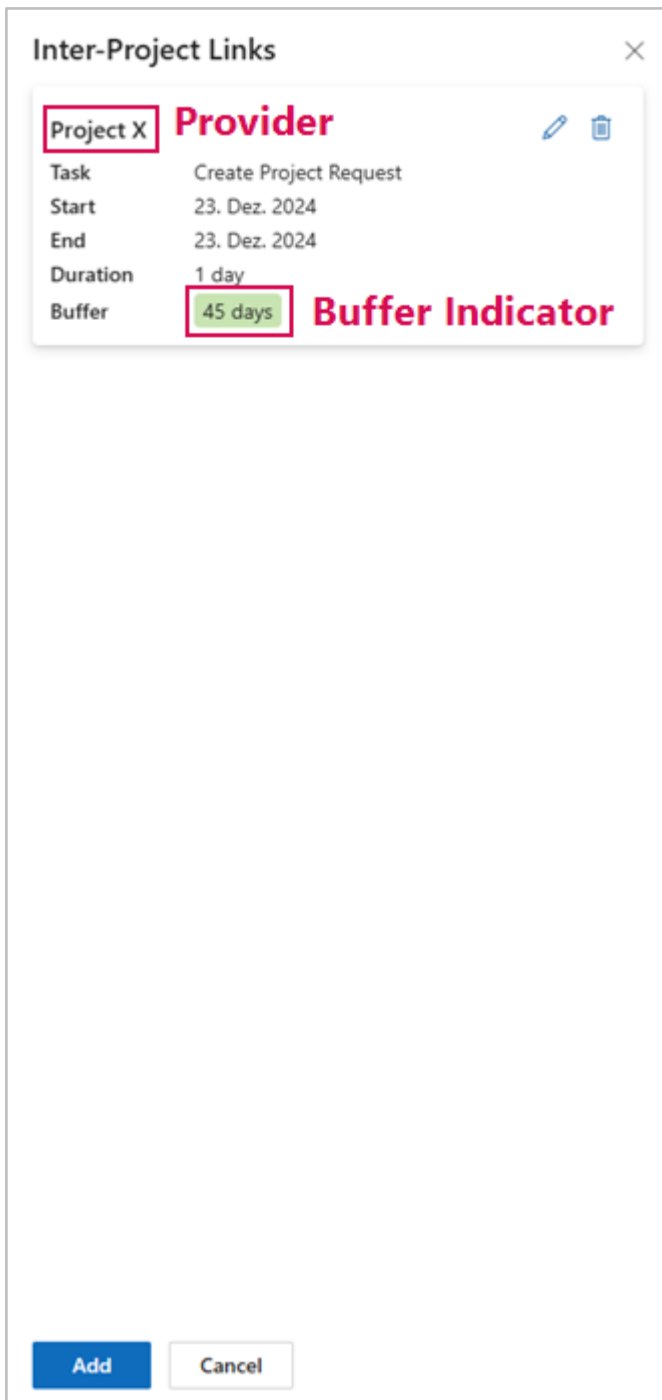
- Click in the *Note* field to enter a note for linking the tasks.

-
- ▶ The project manager of the consumer (current project) is automatically entered in the *Owner* field.

-
- Click on *Save and Close*.

- ▶ The Inter-Project Link has been created.

- ▶ The Inter-Project Links are displayed in the *Inter-Project Links* overview.




-
- ▶ The buffer is green if a buffer is available.
 - ▶ The buffer is red if the buffer has been exceeded.
-

5.9.2 Edit Inter-Project Links

In TPG Scheduler, you can edit inter-project links on the *Schedule* tab as follows:

On the *Schedule* tab, a link icon in the indicator column shows when a task is linked to tasks in other projects.

#	i	Name
1		Task 1
2		Subtask 1

➤ Right-click on the task. ➤ The drop-down menu opens.

➤ Go to *Inter-Project Links* and click on *Edit*.

Name	Complete	Start
Task 1	3	06.02.2025
Subtask 1	0	07.02.2025
Subtask 2	0	11.02.2025
Subtask 3	0	13.02.2025

Edit	
Copy	
Cut	
Paste	
Inter-Project Links	➤
Filter	➤
Add	➤

➤ Click on the edit icon. (3) ➤ A form opens.

➤ Click in the field you want to edit to edit the form. (1)

New Inter-Project Link

Save Save & Close + New Deactivate Delete Refresh Share

New Inter-Project Link - Saved
Inter-Project Link

General

Provider

Project * [Project X](#)

Task * [Create Project Request](#)

Relevant Date * Start

Dates

Start	23.12.2024	08:00
Finish	23.12.2024	17:00

Consumer (This Project)

Project * [Projekt XY](#)

Task * [Task 1](#)

Relevant Date * Start

Dates

Start	06.02.2025	08:00
Finish	19.02.2025	17:00

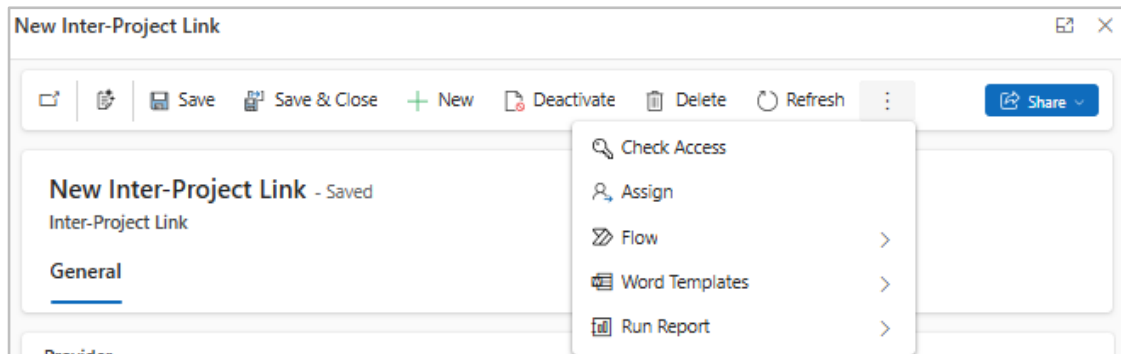
General

Buffer Indicator * Green when provider is the earlier date

Note ---

Owner * [PPP Project Manager \(Offline\)](#)

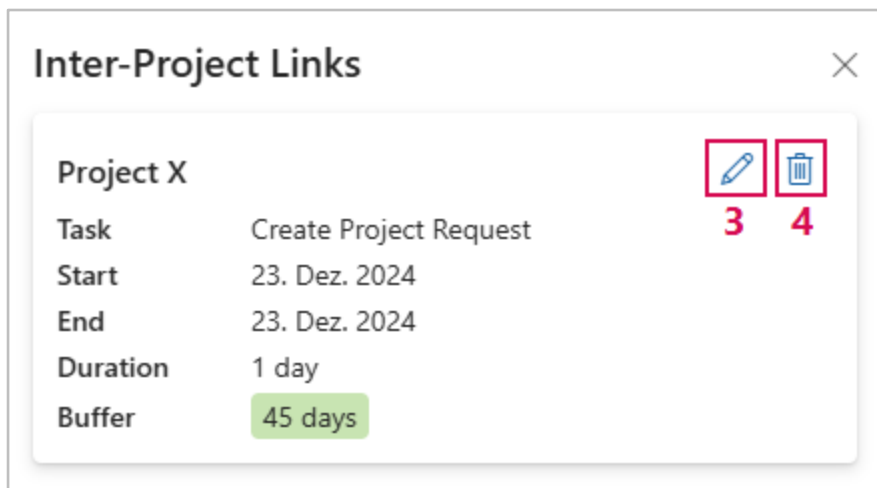
- ▶ The command bar of the form contains buttons to deactivate the links or share them with others.



- Click on *Save* or *Save & Close*. (2)
- Close the *Inter-Project Links* window.

Delete links:

- Click on the delete icon. (4) ▶ A confirmation prompt appears.
- Click on *Delete*.



Jump to the linked task of the other project in the Gantt chart:

- Activate *Show Inter-Project Links* in the Gantt chart. (see [Schedule - Buttons](#) (35))
- Right-click on the task.

➤ Go to *Inter-Project Links*, Scroll to and click on the task (e.g. *Create Project Request*).

#	i		% Complete	Start	Finish
1		<ul style="list-style-type: none"> Edit Copy Cut Paste 	53	06.02.2025	19.02.2025
2			100	07.02.2025	10.02.2025
3			100	11.02.2025	17.02.2025
4		Inter-Project Links >		11.02.2025	19.02.2025
5		Filter >		Scroll to >	Create Project Request
		+ Add... >			




▶ The linked task is highlighted in the Gantt chart.

▶ Inter-Project Links can only be edited or deleted in the project in which they were created.

6 Resource Planning

You can plan resources in the TPG Scheduler.

There are three options with different procedures for resource planning and allocation:

- **Assign resources to tasks directly in the schedule.**  [77](#)
You can then transfer the data to the resource plan to check resource availability.
- **Assemble the project team manually on the “Project Team” tab.**  [81](#)
If your project contains the Project team tab, you can assemble the project team manually and then assign the tasks in the schedule.
- **Create resource plan manually on the “Resource plan” tab.**  [83](#)
This allows you to see the availability of the resources before you assign tasks to them.

▶ Assigned resources and their tasks can be synchronized in the resource plan. The availability of the resources is displayed there. If a resource is assigned to a task in the *Schedule*, the resource is automatically added to the team on the *Project team* tab.

6.1 Assign Resources in the Schedule

On the *Schedule* tab, you assign the resources to the tasks.

- Go to the *Assigned Resources* column.
- Double-click in the cell of a task.
- Click on the arrow. (1) ▶ A drop-down menu opens in which you can search for the resources.

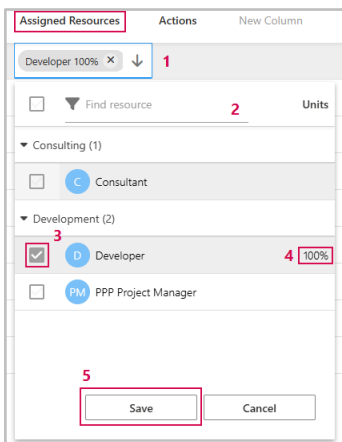
▶ If you have already put together a project team, the drop-down menu shows the members of the project team. You can also search for other resources. Assigned resources are automatically added to the project team.

- Enter the name of the resource or the name of the department in the filter field. (2)
 - Enter an asterisk (*) as a placeholder for parts of the name.
 - Enter two asterisks (**) to display a list of all resources in the resource pool.







- Select a resource from the search results.
- Click on the checkbox of the resource you want to assign to the task. (3)

Change percentage of working time:

- Double-click on the *Units* column.
 - Enter the desired value. (4)
 - Click on *Save*. (5)
- ▶ The resource is assigned to the task and appears in the schedule.



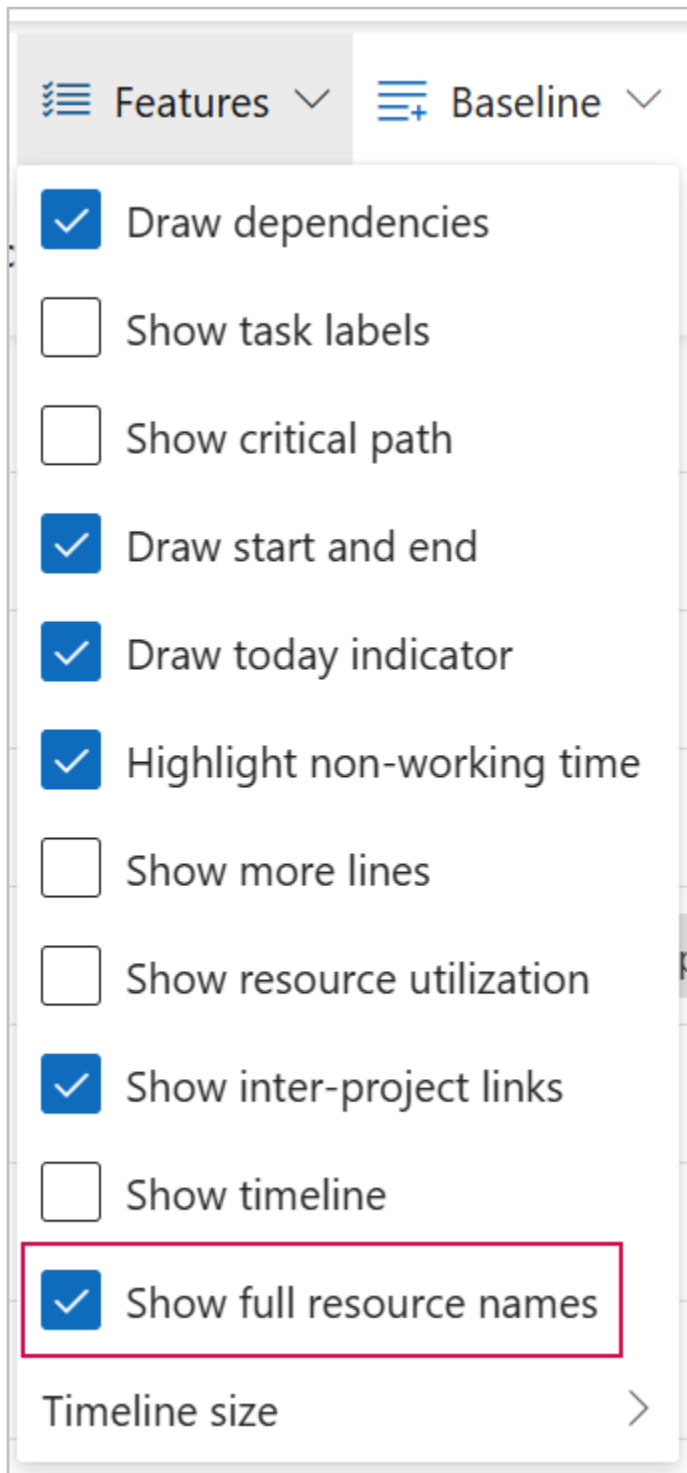
By default, the name of the resource is displayed as an abbreviation in the schedule:

Duration	Predecessors	Assigned Resources
10 days		
2 days		
5 days	2	
7 days	3SS	
5 days	4FF	 
1 day		
10 days		

You have the option of displaying the full name of the resource in the schedule:

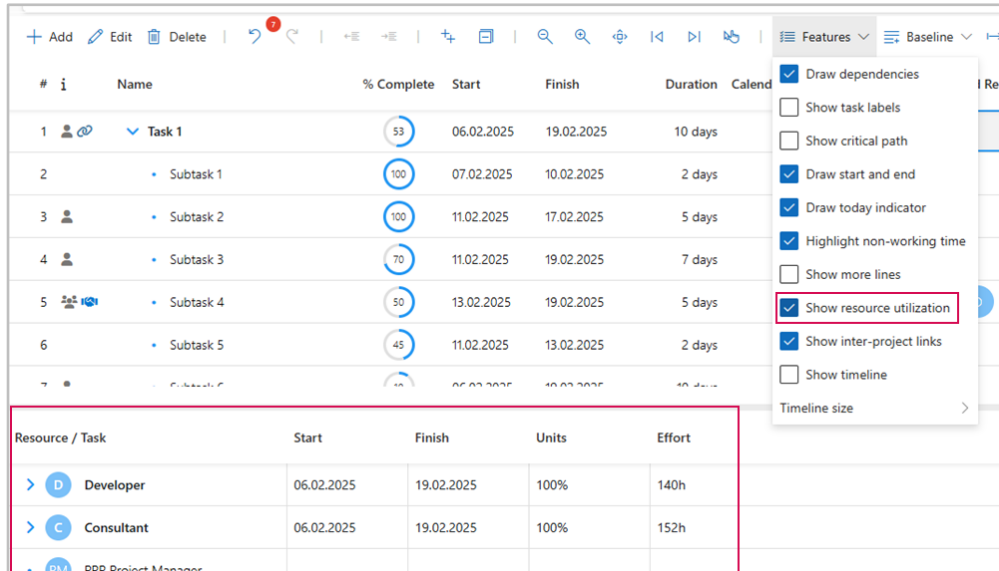
- Click on *Features*. ▶ A drop-down menu opens.

➤ Click on *Show full resource names*.



▶ The full resource name is displayed in the schedule.

If *Show resource utilization* is activated in the *Features* menu, the resources and the allocated working hours are displayed in a table below the schedule.

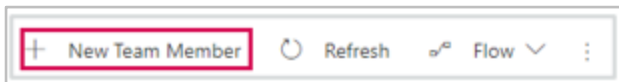


6.2 Project Team Tab - Assemble project team manually

► Only for project types with the *Project Team* tab.

➤ Go to the *Project Team* tab.

➤ Click on *New Team Member*.



► Resource type *Company* is preset. I.e. a member of your organization that is listed under *Resources*.

- Click in the *Resource* field.

Quick Create: Team Member

Resource Type * Enterprise

Resource Look for Resource

Project * Project B

- Search for the desired person.
- Add further team members: Click on the arrow next to the Save button and select *Save & Create New*.

Save & Create New

Save and Close

Cancel

- Click *Save and Close* to complete the task.

Add people to the project team who are not listed as a resource:

- Select the *Local* resource type in the *Quick Create* form.

Quick Create: Team Member


Resource Type * Enterprise

Resource Enterprise

Local

Project * Project B

- Enter the name of the person you want to add to the project team.



- Click on *Save and Close*.

▶ Local resources cannot be entered in the resource plan. Local resources can be assigned in the schedule.

6.3 Resource Plan Tab - Create resource plan manually

You create the resource plan on the *Resource Plan* tab. You can plan the operating times of the individual resources.

▶ By default, planning is at monthly level. Other time units can be configured.

- Click *Sync (1)* to transfer already assigned resources to the resource plan. ▶ The *Synchronize rows* dialog box opens.
- Click on the *Overwrite existing* checkbox.
- Click on the *Include work values* checkbox if you also want to apply the work values of the resource.

- Click on *Update*. ► The resources and their tasks are transferred to the resource plan.

Synchronise rows

Synchronise tasks and team members with this resource plan

Overwrite existing

Include work values

- Click on *New (2)* to add resources manually. ► A new row appears in the table.

Resource Department	Resource Name	Assignment	Comments	Year	Total	Jan	Feb	Mar
Development (5)					8,50		8,50	
Development	Developer	Subtask 4		2025	5,00		5,00	

- Click in the cell in the *Resource Name* column. ► A drop-down menu opens.

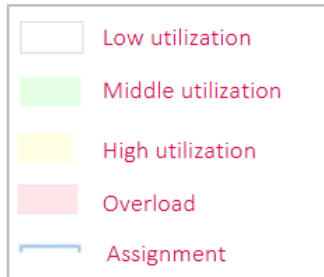
- Select the name of the desired resource in the drop-down menu.

Resource Department	Resource Name	Assignment
Development (5)		
Development	Developer	
Development	<input type="text"/>	
Development	<ul style="list-style-type: none"> ▼ Consulting Consultant PPP Project User ▼ Development 	

-
- The *Resource Department* column is filled in automatically if data is available.
-

- The resource is added.

Colors show the utilization of the individual resources. The following color scheme applies:



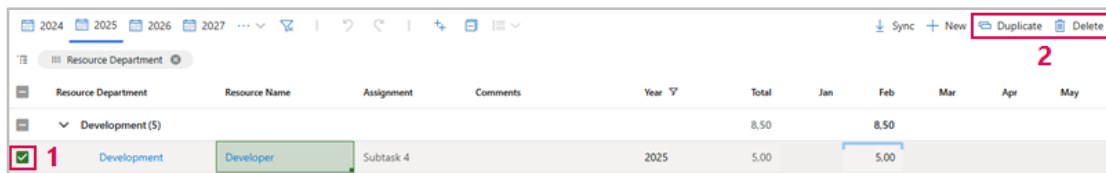
The mouseover shows the number of days on which the resource is available or otherwise scheduled.



► In the monthly field, you can enter the number of days for which you are scheduling the resource.

Duplicate or delete entries:

- Select the task you wish to duplicate or delete.
- Click on the checkbox at the beginning of the line of the task. (1)
- Click on *Duplicate* or *Delete*. (2)



► The task is duplicated or deleted.

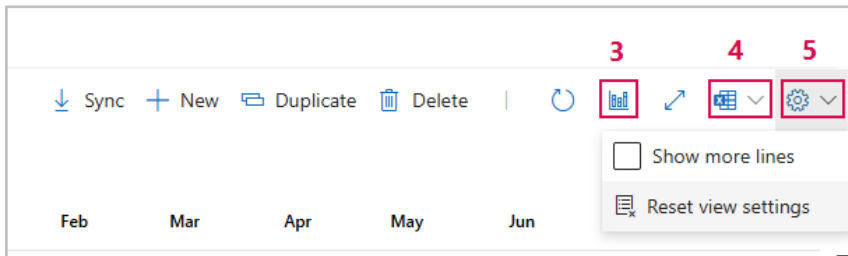
Further functions:

The buttons in the *Resource Plan* tab offer you even more functions:

- Graphical representation of the data:
 - Click on the graphic pictogram. (3) ► A diagram is shown or hidden below the table.
- Export all selected rows to Excel:
 - Click on the Excel pictogram. (4)

- Show more rows or reset display settings:

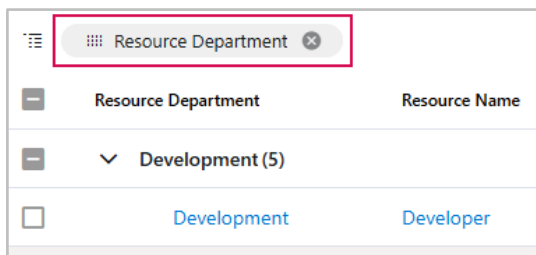
➤ Click on *Settings* (gear wheel). (5)



- Change standard groupings:

➤ Drag column header over table.

➤ Remove column headings: Click on the cross.



➤ Show and hide columns:

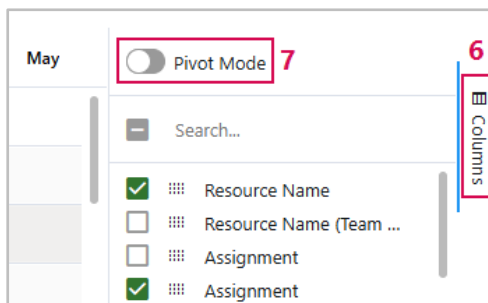
➤ Click on *Columns*. (6)

➤ Activate or deactivate the checkboxes.

➤ Create pivot table:

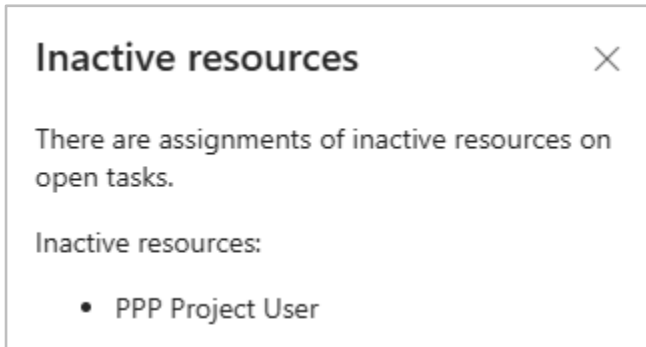
➤ Click on the *Pivot Mode* button to activate the pivot mode. (7)

You can determine the order of the column titles using drag & drop.



6.4 Inactive Resource

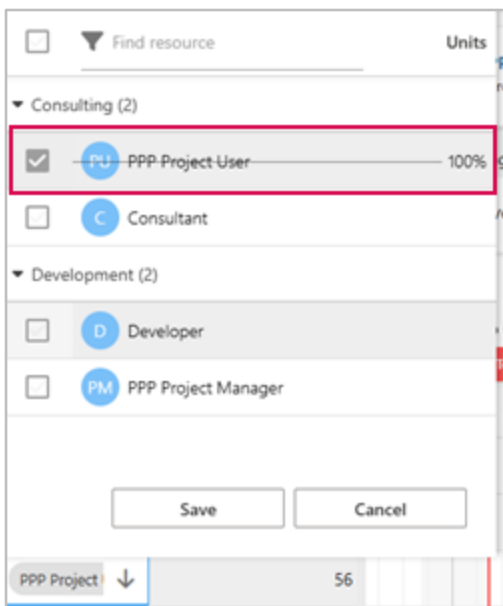
A warning appears if you open a schedule in which open tasks are assigned to a deactivated resource.



The indicator column of the task shows a warning symbol next to the resource symbol.



The name of the inactive resources is crossed out in the resource plan of the schedule and in the resource plan.



Resource Department	Resource Name
▼ Consulting (2)	
Consulting	PPP Project User
Consulting	Consultant

6.5 Resource Plans Overview

The Resource Plans overview provides a comprehensive view of all available resources in a tabular format.

To access the Resource Plans overview, follow these steps:

➤ Click on *Resource Plans* in the navigation bar.

▶ The Resource Plans overview opens.

The screenshot displays the 'Resource Plans' overview in a web application. The interface includes a left-hand navigation menu with categories like Home, Recent, Pinned, Start, My Work, Requests, Projects, Portfolios, Programs, Actions, People, Resources, Contacts, Timesheets, Approvals, and Reports. The 'Resource Plans' option is highlighted. The main content area shows a table with columns for Resource Department, Project, Resource Name, Comments, Y. Y, Total, and monthly working time (Jan to Aug). The table is organized into two main sections: 'Consulting (8)' and 'Development (6)'. The 'Consulting' section lists resources like 'Consultant' and 'PPP Project User' with their respective monthly allocations. The 'Development' section lists resources like 'Developer' and 'PPP Project Manager' with their monthly allocations. The table uses color coding: green for positive values, red for negative values, and yellow for zero values.

Resource Department	Project	Resource Name	Comments	Y. Y	Total	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Consulting (8)					25.00	5.00	20.00						
Consulting	Project XY	Consultant		2025	7.00		7.00						
Consulting	Project XY	Consultant		2025	5.00		5.00						
Consulting	Project XY	PPP Project User		2025	7.00		7.00						
Consulting	Project XY	Consultant		2025	1.00		1.00						
Consulting	Project XY	PPP Project User		2025	0.00								
Consulting	Project A	Consultant		2025	2.50	2.50							
Consulting	Project X	Consultant		2025	2.50	2.50							
Consulting	Project XY	Consultant		2025	0.00								
Development (6)					123.00	2.50	88.50	12.00	20.00				
Development	Project XY	Developer		2025	5.00		5.00						
Development	Project XY	Developer		2025	1.00		1.00						
Development	Project XY	Developer		2025	2.50		2.50						
Development	Project X	Developer		2025	114.50	2.50	80.00	12.00	20.00				
Development	Project XY	PPP Project Manager		2025	0.00								

This view allows you to capture important information at a glance:

- **Resource Overview:** All resources are listed in a table.
- **Department Assignment:** Each resource is assigned to the corresponding department.
- **Project Assignment:** The table shows the projects on which the resources are currently working.
- **Resource Name:** The name of each resource is displayed.
- **Planned Working Time:** The planned working time of each resource is broken down by month.

Color Scheme of Resource Availability:

The Resource Plans overview displays a heatmap that shows the availability of resources in percentage terms. This display is based on the totality of all resources in a department.

The following color scheme applies:

- **White:** Indicates that the resources are 100% available.
- **Green:** Indicates that more than 10% of the resources are available.
- **Yellow:** Indicates that the availability of resources is between -10% and +10%.
- **Red:** Indicates that less than -10% of the resources are available.

The Mouseover shows the availability as a percentage:



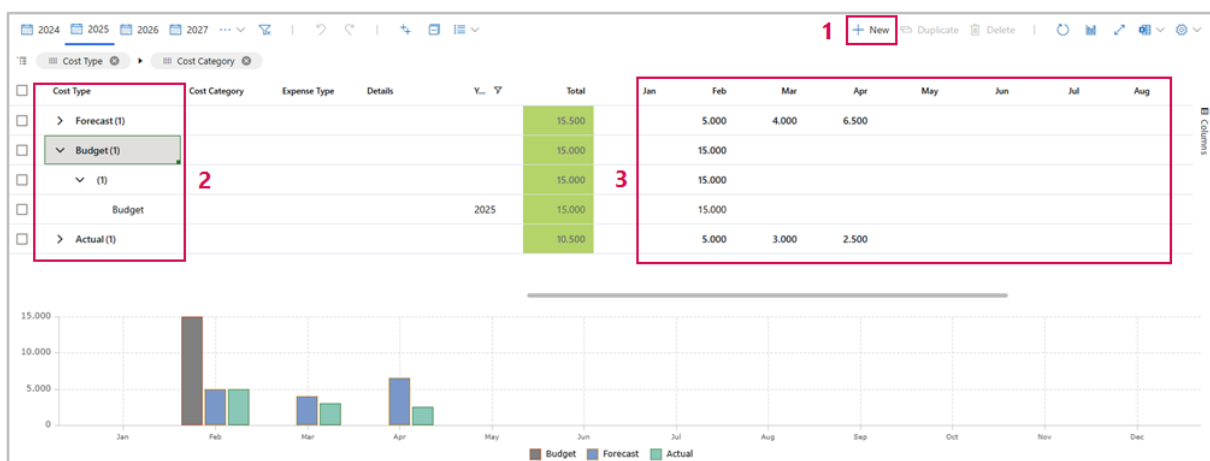
7 Budget Planning

Labor costs are not calculated automatically in TPG PPP. You can enter financial data on the *Financials* tab for a cost overview:

▶ The functions of the buttons are the same as in the *Resource Plan* tab. (see [Resource Plan tab - create resource plan manually](#) ⁸³)

- Go to the *Financials* tab.
- For each cost item, create rows for the *Budget*, *Forecast* and *Actual* cost types:
 - Click on *New*. (1)
 - Click in the *Cost Type* cell. ▶ A drop-down menu opens.
 - Click on *Budget*, *Forecast* or *Actual*. (2)
- Enter the available budget and the expected costs for each time period of the project.
 - Click in the cell of the desired time period. (3)
 - Enter the amount.

▶ *Total* updates automatically.



Add to or update the actual data and forecasts as the project progresses.






► Totals are also displayed on the *Project Details* tab under *Project Estimates*. (see [Project Details](#) (26))

8 Status Update

On the *Status Update* Tab, you can create status updates in the form of status reports on the current project schedule and share them with stakeholders.

Status reports are an essential tool for monitoring the progress of a project, ensuring transparency and making informed decisions. Status reports help to keep everyone involved up to date and identify potential problems at an early stage.

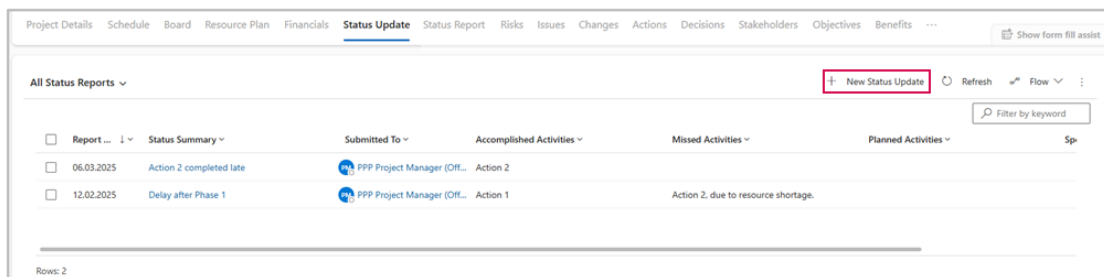
We will guide you through the process step by step and show you how to work with status updates:

- [Add Status Update](#)  92
- [Edit Status Update](#)  95
- [Deactivate and Activate Status Update](#)  96
- [Adjust Table](#)  98
- [Further Commands for Status Updates](#)  100

8.1 Add Status Update

To add a *Status Update*, follow these steps:

- Click on *New Status Update*. ► The *Quick Create: Status Update* form for creating a status report will open.



Quick Create: Status Update ✕

Status Details

Report Date * --- ⋮

Project * 📄 Project X ✕ 🔍

Status Summary * ---

Owner * PM PPP Project Manager (Offline) ✕ 🔍

Submitted To * --- 🔍

Email Status Update Yes

Updates

Accomplished Activities ---

Missed Activities ---

Planned Activities ---

Sponsor Actions ---

Save and Close Cancel

➤ Fill in the form:

▶ To add a status update, the required fields must be filled out. All required fields are marked with a red asterisk.

- **Status Details:**

- **Report Day:**

- Click on the calendar icon and enter the date on which you are creating the report.

- **Project:** The current project is selected by default.

▶ You can select a different project by clicking on the search icon (magnifying glass) and choosing another project from the dropdown menu.

- **Status Summary:** Description of the Status Update

- Enter a description for the status update. It should be as detailed as possible (e.g., Delay after Phase 1).

- **Owner:** Creator of the status update. By default, the current user is entered.

▶ You can select a different user as the owner by clicking on the search icon (magnifying glass) and choosing another user from the dropdown menu.

- **Submitted to:** Stakeholder to whom the status update is submitted.

- Click on the input field, press Enter, and enter the desired stakeholder.

- **Email Status Update:** enabled by default.

- Click the toggle switch to disable sending the status update via email.

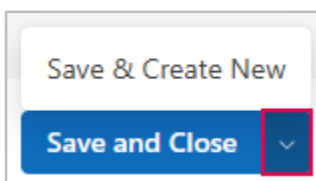
- **Updates:** Description of the status updates.

- Enter the descriptions of the status updates in the corresponding field. The description should be as detailed as possible.

- Click *Save and close*.

Or

- Click the down arrow and select *Save & Create New* to add another status update.



- ▶ A status update has been added.
- ▶ The status update appears in the table *All Status Reports*.

8.2 Edit Status Update

A status update can be edited as follows:

- Click on the preview in the *Status Summary* column. ▶ The form for editing the status update opens.

<input type="checkbox"/>	Report ... ↑	Status Summary ↓	Submitted To ↓
<input type="checkbox"/>	12.02.2025	Delay after Phase 1	PM PPP Project Manager (C

Or

- Click on the row of the status update to select it.
- Click on *Edit*.

All Status Reports ↓					Edit
<input type="checkbox"/>	Report ... ↑	Status Summary ↓	Submitted To ↓	Accomplished Activities ↓	Missed Activities ↓
<input checked="" type="checkbox"/>	12.02.2025	Delay after Phase 1	PM PPP Project Manager (Off...	Action 1	Action 2, due to resource short

- Enter the desired changes in the form.
- Click *Save (1)* to save the changes and continue editing.

Or

➤ Click *Save & Close* (2) to save the changes and finish editing.

The screenshot shows a web interface for editing a status update. At the top, a toolbar contains buttons for 'Save', 'Save & Close', 'Deactivate', 'Delete', 'Refresh', 'Check Access', 'Assign', 'Flow', 'Word Templates', and 'Run Report'. The 'Save & Close' button is highlighted with a red box and labeled with a red '2'. Below the toolbar, the page title is 'Delay after Phase 1 - Saved'. The main content area is divided into sections: 'General', 'Status Details', 'Accomplished Activities', 'Missed Activities', 'Planned Activities', and 'Sponsor Actions'. The 'Status Details' section contains fields for 'Report Date' (12.02.2025), 'Status Summary' (Delay after Phase 1), 'Owner' (PPP Project Manager (Offline)), 'Submitted To' (PPP Project Manager (Offline)), and 'Email Status Update' (No).

8.3 Deactivate and Activate Status Update

By default, status updates are active. You can deactivate status updates:

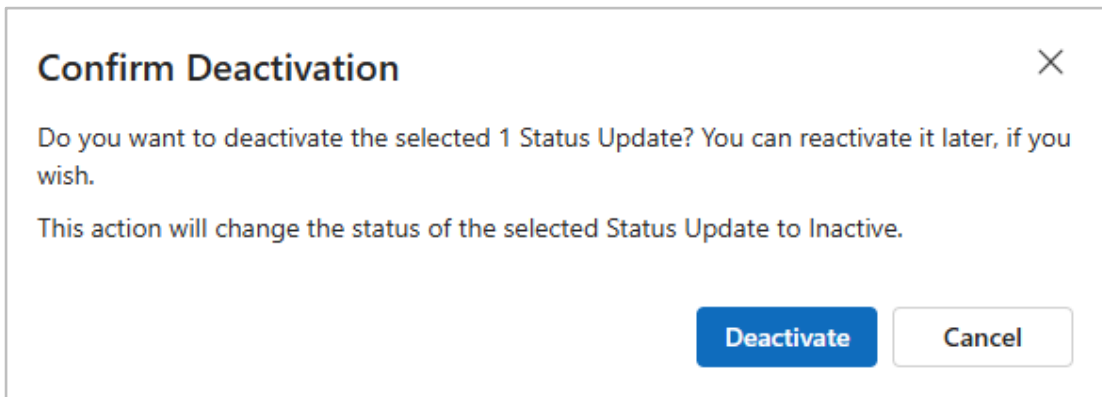
- Select the status update you want to deactivate.
- Click on the row of the status update to select it. (1)
- Click on *Deactivate*. (2)

The screenshot shows a table titled 'All Status Reports'. The toolbar at the top includes 'Edit', 'Activate', 'Deactivate', and 'Delete Status Update'. The 'Deactivate' button is highlighted with a red box and labeled with a red '2'. The table has columns for 'Report ...', 'Status Summary', 'Submitted To', 'Accomplished Activities', 'Missed Activities', and 'Planned Activities'. The second row is selected, showing a report for '12.02.2025' with the summary 'Delay after Phase 1'.

Report ...	Status Summary	Submitted To	Accomplished Activities	Missed Activities	Planned Activities
06.03.2025	Action 2 completed late	PPP Project Manager (Off...)	Action 2		
12.02.2025	Delay after Phase 1	PPP Project Manager (Off...)	Action 1	Action 2, due to resource shortage.	

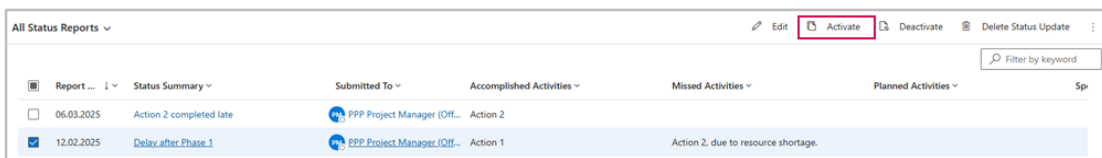
▶ The *Confirm Deactivation* field opens.

- Click *Deactivate* to deactivate the status update.

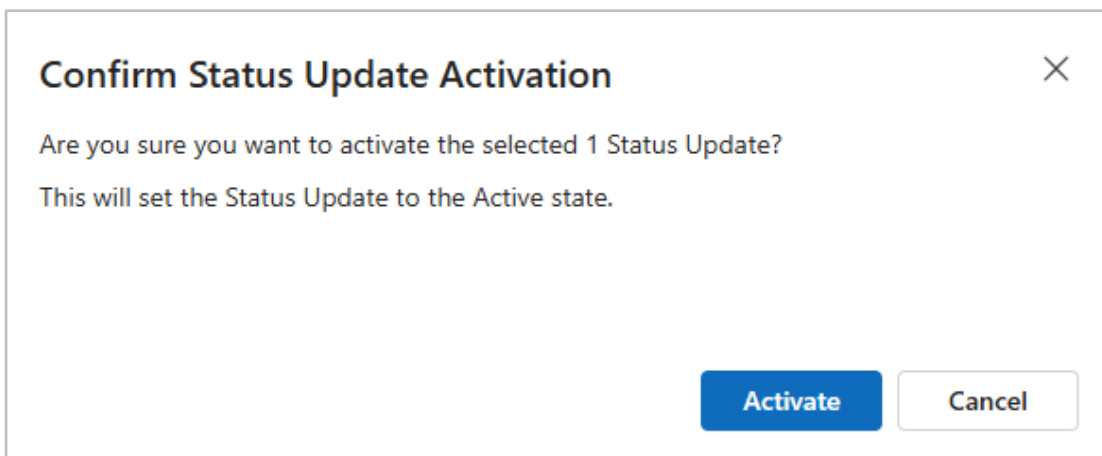


Activate status update:

- Select the status update as described above.
- Click on *Activate*.



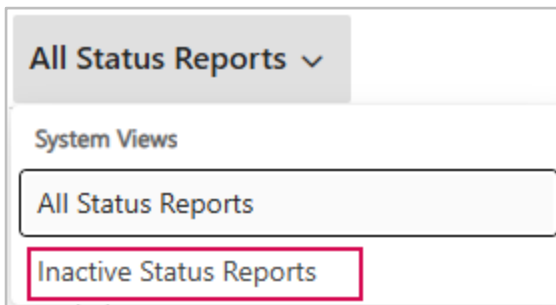
- ▶ The *Confirm Status Update Activation* field opens.
- Click *Activate* to activate the status update.



By default, all active and inactive status updates are listed in the table. You can display only inactive status updates in the table:

- Go to *All Status Reports*.
- Click the down arrow.

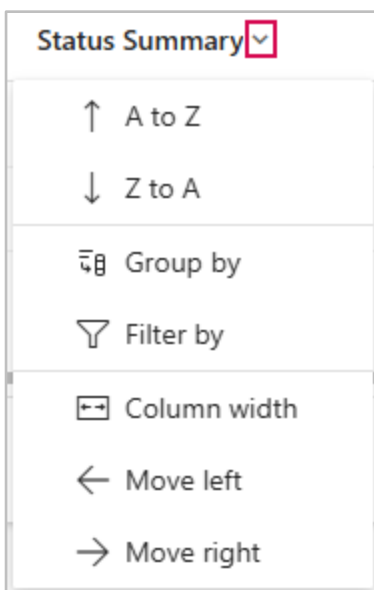
- Click on *Inactive Status Reports*.



8.4 Adjust Table

For better clarity, you have the option to customize the table. Depending on the column, various options are available to you:

- Go to the table header.
- Click the down arrow to the right of the column header. ▶ A dropdown menu opens.



- Select the desired option:
 - Sort: *Older to newer/Newer to older* (Date) or *A to Z* or *Z to A*.

- *Group by*: Group status updates by column header (e.g., *Status Summary*).

All Status Reports ▾		
<input type="checkbox"/> Group by: Status Summary	Report ... ▾	Status Summary ▾
<input type="checkbox"/> ▾ Action 2 completed late (1)		
<input type="checkbox"/>	06.03.2025	Action 2 completed late
<input type="checkbox"/> > Delay after Phase 1 (1)		

- *Ungroup*: Remove the selected grouping.
- *Filter by*: Select various filter options (e.g., *Equals*) to display only certain status reports.

Status Summary ▾

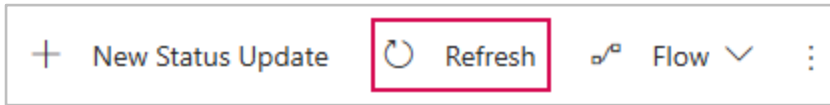
Filter by ✕

▶ In this example, only status reports whose status summary exactly matches the entered text "Delay after Phase 1" are displayed.

- *Clear filter*: Remove applied filters.
- *Column width*: Adjust the column width.
- *Move left*: Move the column one position to the left.
- *Move right*: Move the column one position to the right.

Refresh table:

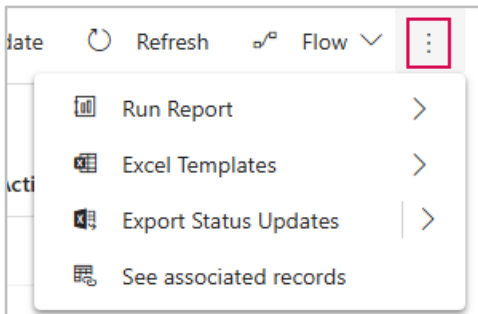
➤ Click *Refresh* to update the table.



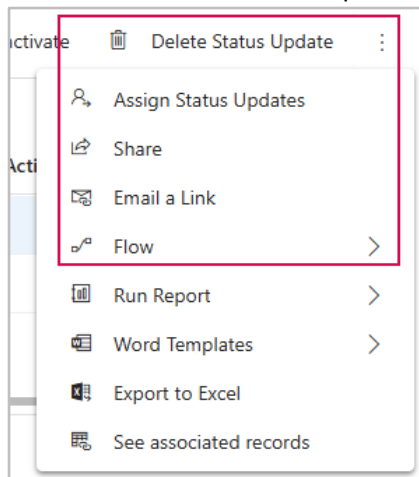
8.5 Further Commands for Status Updates

Above the table, you can perform additional commands for status updates:

➤ Click on the 3 dots above the left side of the table. ▶ A dropdown menu opens.



▶ If you have selected a status update, the dropdown menu contains additional commands related to the selected status update.



➤ Select the desired command:

- *Delete Status Update*: delete the selected status update. The action cannot be undone.
- *Assign Status Update*: change the owner of the status update.

- *Share*: share these status update with selected people or teams. Ownership is not changed.
- *Email a Link*: send a link via Email to the selected records.
- *Flow*: run a flow for this status update.
- *Run Report*: select a report to run.
- *Word Templates*: generate Word documents or new templates.
- *Export to Excel*: export the selected records to data to a static Excel worksheet
- *See associated records*: shows records associated with this view.

9 Status Report

The *Status Report* tab provides a central overview of the current status of the current project. All relevant reports and key figures are bundled here so that you can keep track of progress and potential challenges at all times.

The screenshot displays the 'Project - Status Report' interface. It includes a navigation bar at the top with tabs like 'Schedule', 'Board', 'Resource Plan', 'Financials', 'Status Update', 'Status Rep...', 'Risks', 'Issues', 'Changes', 'Actions', 'Decisions', 'Stakeholders', 'Objectives', 'Benefits', 'Requirements', and 'Lessons Learned'. The main content area is divided into several sections:














- 1:** Project Name (Project X), Project Manager (PPP Project Manager), and Project Number (2024-1018).
- 2:** Overall progress indicators (Overall, Work, Schedule, Resource, Cost, Issue) and a Progress gauge showing 18%.
- 3:** Project start and end dates (Start Date: 23.12.2024, Finish Date: 21.05.2026).
- 4:** Project Details table showing Budget Cost, Forecast Cost, Actual Cost, Actual Effort, Forecast Effort, and Remaining Effort.
- 5:** Report Date (16.07.2025), Reporter (PPP Project Manager), Days Last Report (19), and Status Summary (Start of phase 3 brought forward). A link to 'Link to Status Update' is highlighted.
- 6:** Accomplished Activities, Planned Activities, Missed Activities, and Sponsor Actions.
- 7:** Summary of Active Issues (8), Active Risks (4), Active Actions (3), Active Changes (3), Open Decisions (3), and Lessons (5).
- 8:** Navigation links for Home, Portfolio, Project, Request, and Resource.

A red arrow points to the bottom right corner with the text 'Detailed Reports on individual aspects'.

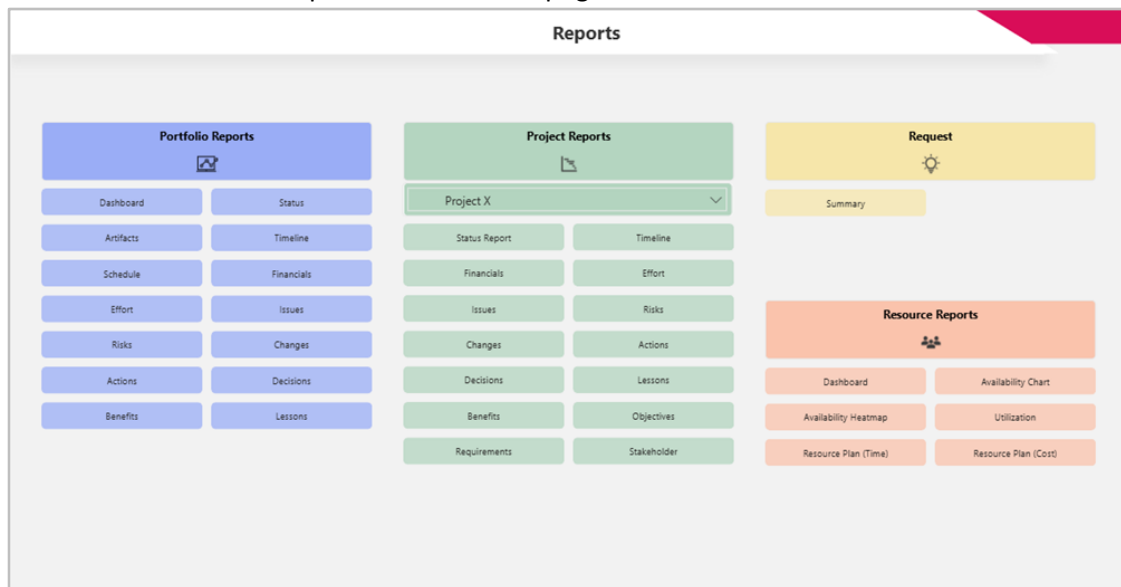
On the start page of this tab, you will find the most important information about the current project, such as:


- Project Name, Project Manager, and Project Number (1)
- Progress of the entire project and traffic light display (red, yellow, green) for the individual **Project KPIs** (2)
- Project start and end dates (3)
- Cost development (4)
- Information and link to the last **Status Update** (5)
- Actions from the last Status Update and their implementation status (6)
- Number of active **Issues** (131), **Risks** (121), **Changes** (139), Actions, open **Decisions** (169), and **Lessons** (212) (7)
- Links to the home page and other reports: *Portfolio, Request, Resource* (8)

In addition to the Home page, the Status Report tab contains additional sub-tabs with detailed reports on individual aspects of the project:

- [Timeline](#)  104
- [Financials](#)  106
- [Effort](#)  109
- [Issues](#)  111
- [Risks](#)  112
- [Changes](#)  113
- [Actions](#)  114
- [Decisions](#)  115
- [Lessons](#)  116
- [Benefits](#)  117
- [Objects](#)  118
- [Requirements](#)  119
- [Stakeholder](#)  120

► You will find links to all reports on the Home page.



► The language of the reports is set centrally. It is not possible to change the language via the [Personalization Settings](#)  10. Available languages: English and German.

9.1 Timeline

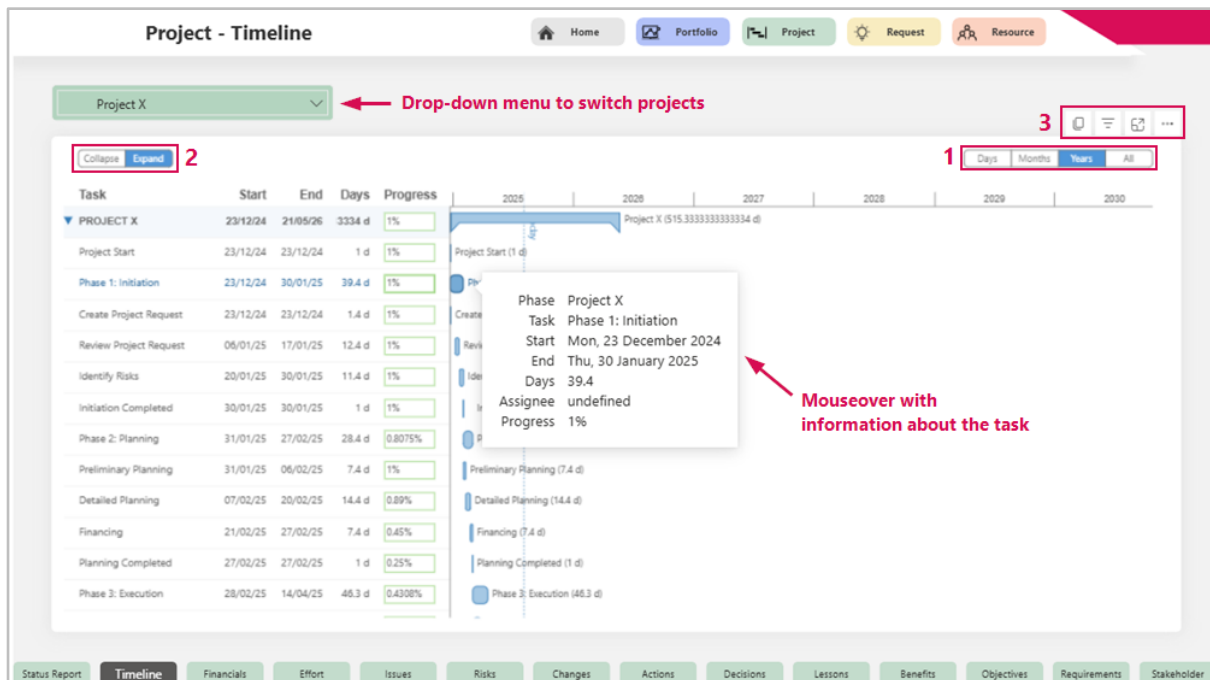
On the *Timeline* tab, you will find a visual representation of the project progress in the form of a table and a Gantt chart:

Table:

- Rows: Task of a project
- Columns: Start, end, days, and progress of the task

Gantt chart:

- The duration and timeline of a process are represented by colored bars.
- Hovering over a bar displays details about the respective process.
- You can zoom in or out on the display:
 - Move the mouse pointer over the Gantt chart.
 - Use the mouse wheel to zoom in or out to adjust the view.



Adjusting the time scale of the Gantt chart (1):

The time scale of the timeline can be adjusted flexibly:

- Click on the desired time scale.

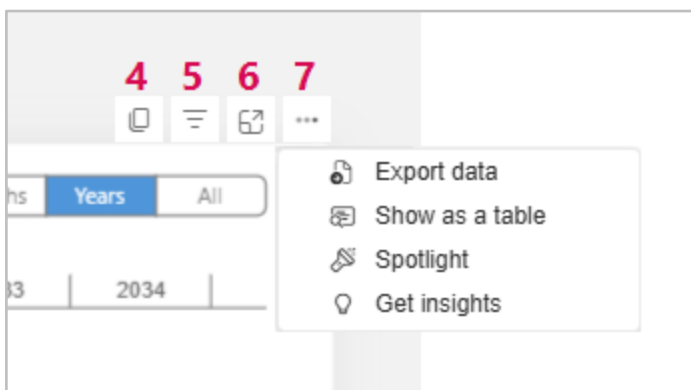
- *Years* (default view)
- *Months*
- *Days*
- *All*: Automatically displays only the period relevant to the project (project start to project end).

Expand and collapse tasks (2):

- Click *Collapse*. ► All tasks are collapsed.
- Click *Expand*. ► All tasks are expanded.

Additional options (3):

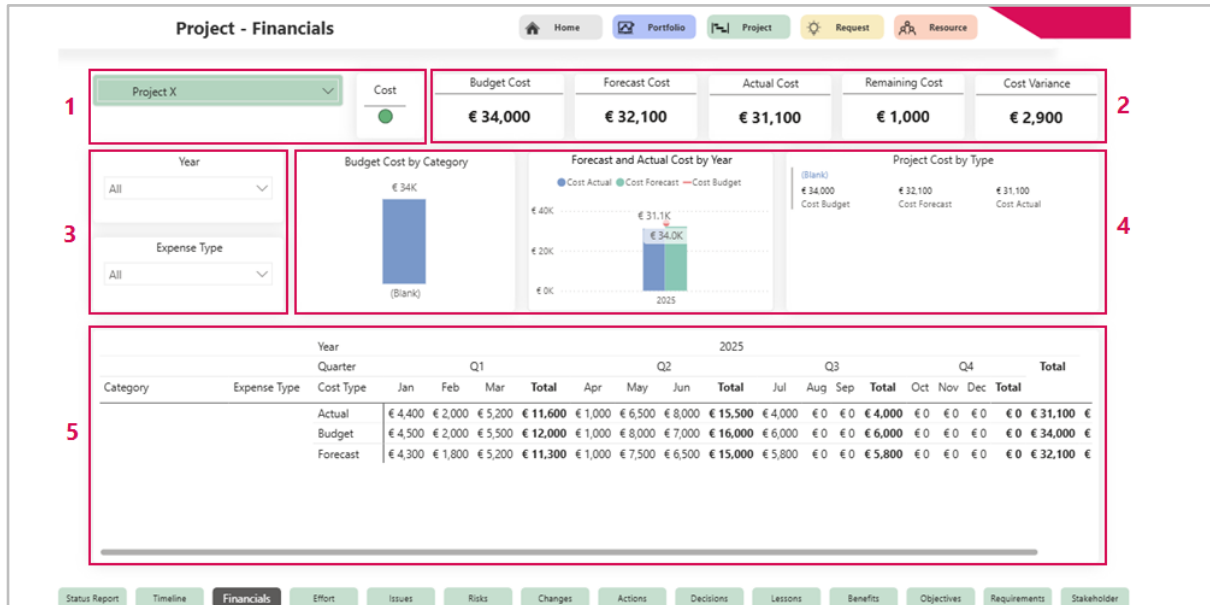
- Copy timeline as graphic. (4)
- Apply filters to influence the visual representation. (5)
- Show only enlarged timeline. (6)
- More options (7):
 - Export data
 - Display data as table
 - Highlight timeline
 - Show insights



9.2 Financials

The *Financials* tab provides a detailed overview of the project's financial key figures:

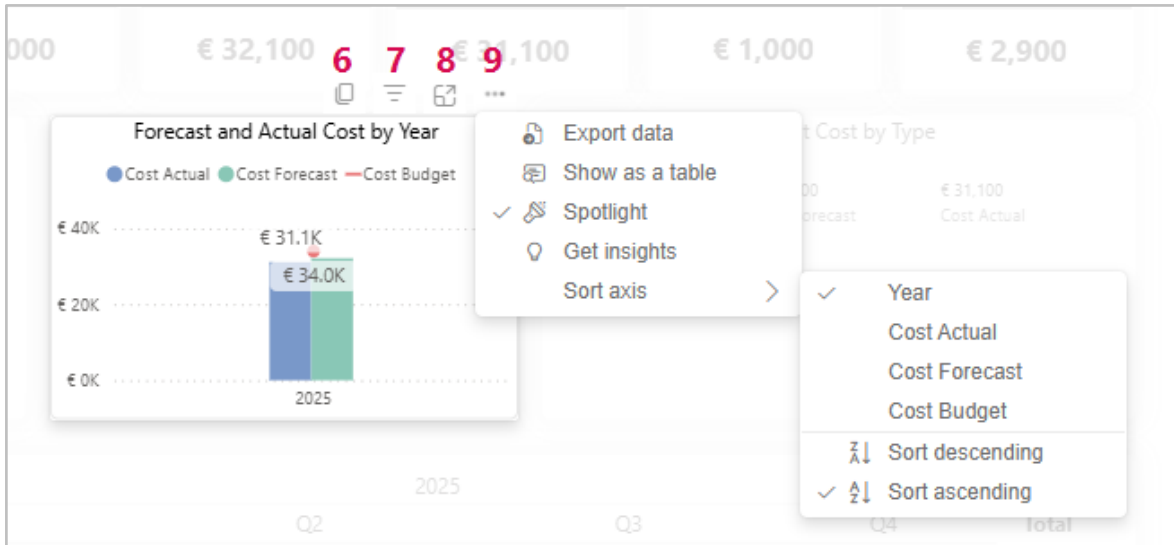
- Project name and traffic light display for evaluating the current cost situation (1)
- Numerical information on costs (2):
 - Budget Cost
 - Forecast Costs
 - Actual Cost
 - Remaining Cost
 - Cost Variance
- Filter and customize data using two drop-down menus (3):
 - Select the year for which you want to view financial data.
 - Select the cost type.
- Bar charts show cost development and project costs by type (4)
- Annual overview of costs in table form (5):
 - *Actual*
 - *Budget*
 - *Forecast*



Additional display options for the bar chart:

The bar chart compares actual costs with projected costs. The following options are available:

- Copy bar chart as graphic (6)
- Apply filters to influence the visual display (7)
- Display enlarged bar chart (8)
- More options (9):
 - Export data
 - Display data as a table
 - Highlight bar chart
 - Display insights
 - Sort axes



9.3 Effort

The *Effort* tab provides a detailed overview of all efforts in the project:

- Project name and traffic light display for evaluating the amount of work involved (1)

- Status overview of tasks:

A bar chart (2) shows the current status of all tasks, divided into:

- Overdue tasks
- Completed tasks
- Delayed tasks

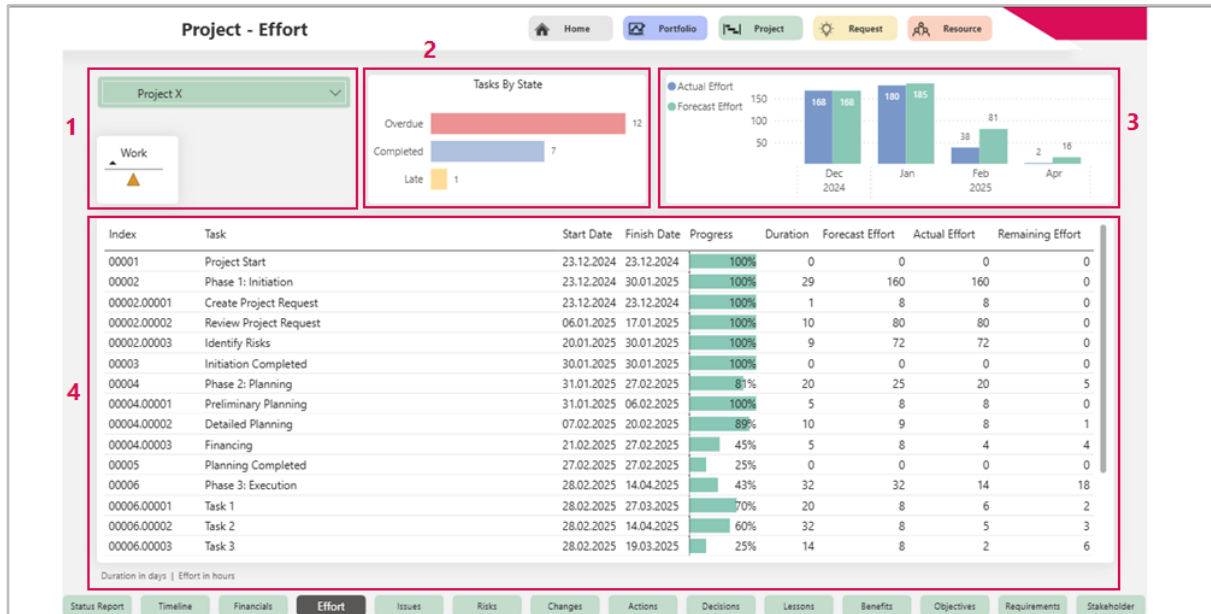
- Comparison of actual and estimated effort:

A column chart (3) compares the actual effort with the estimated effort.

- Tabular list of tasks:

Below the charts, you will find a table (4) listing all tasks, including:

- *Start Date* and *Finish Date*
- *Progress*
- *Duration*
- *Forecast Effort*
- *Actual Effort*
- *Remaining Effort*



9.4 Issues

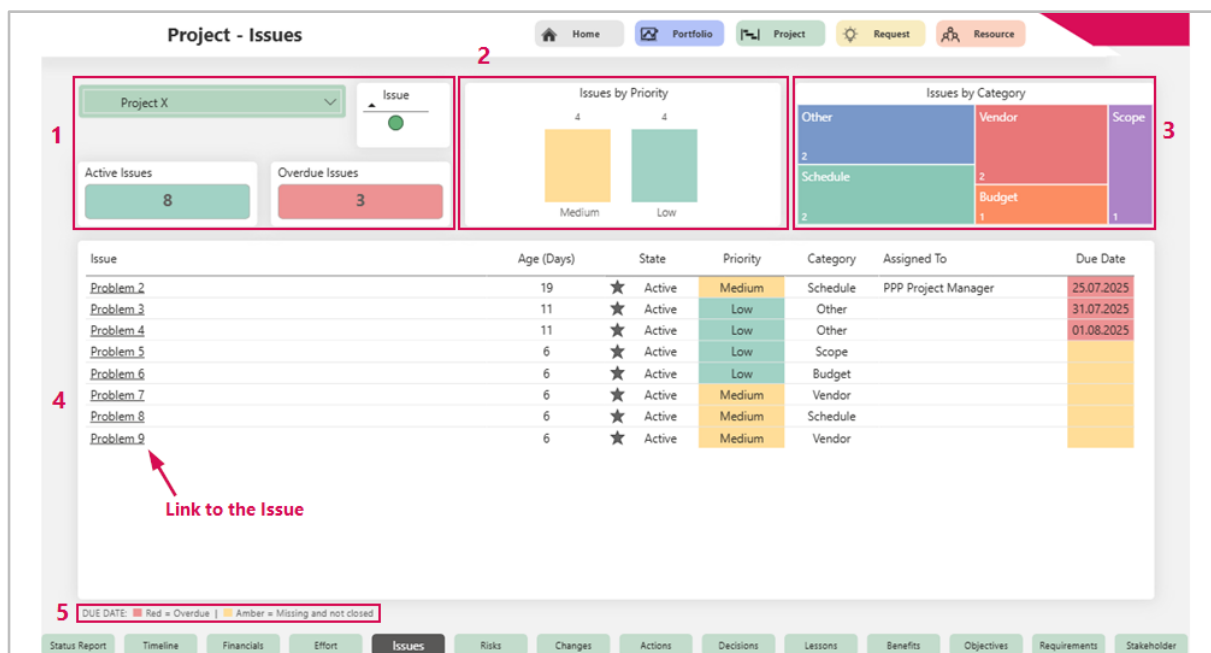
The *Issues* tab provides a detailed overview of all issues in the project.

Project overview (1):

- Project name
- Traffic light display for evaluating the current issue situation
- Number of active issues
- Number of overdue issues

Visualization of issues:

- Bar chart by priority: Shows the distribution of issues by priority level (2)
- Graphical representation by category: Visualizes the issues by category (3)
- Tabular list of all issues with the most important information and link to the issue (4)
- Color legend (5)



9.5 Risks

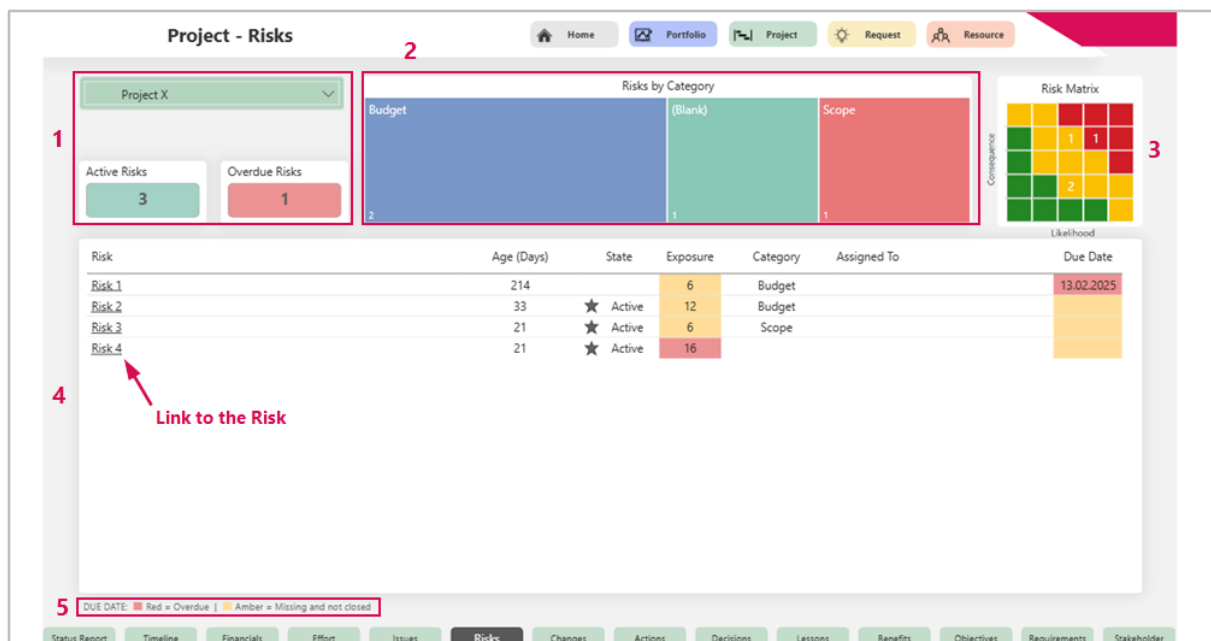
The *Risks* tab provides a detailed overview of all risks in the project:

Project overview (1):

- Project Name
- Number of active Risks
- Number of overdue Risks

Visualization of risks:

- Graphical representation by category: Shows the distribution of Risks by category (2)
- Risk Matrix (3): Shows the Risks according to probability of occurrence and consequence
- Tabular list of all Risks with the most important information and link to the Risk (4)
- Color legend (5)



9.6 Changes

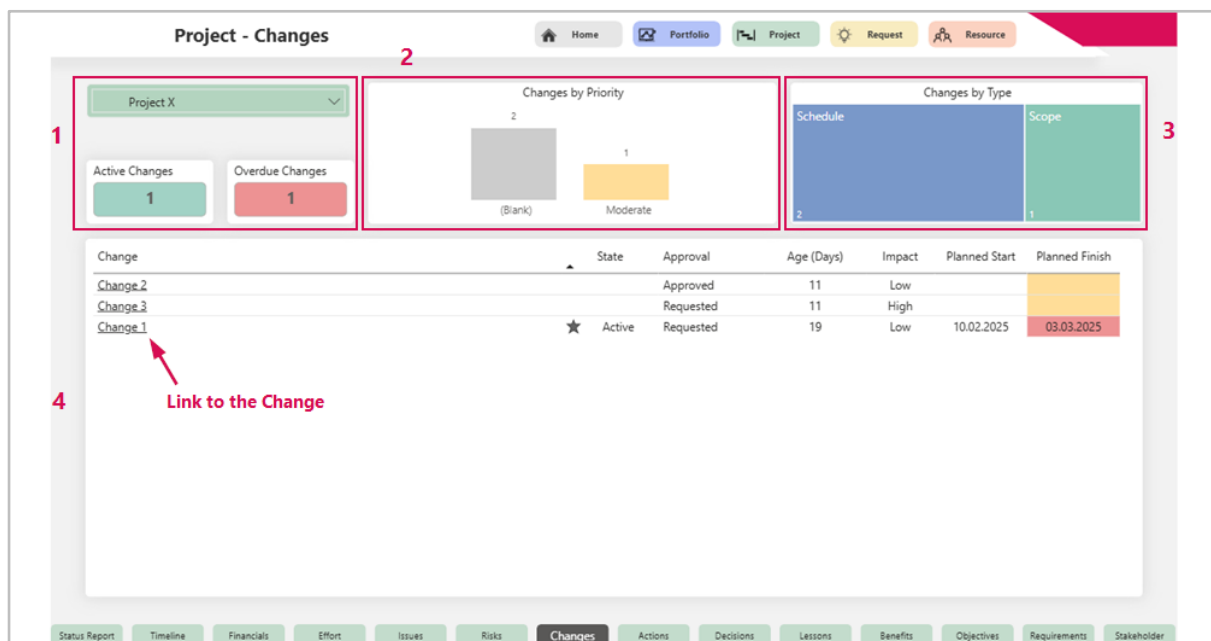
The *Changes* tab provides a detailed overview of all changes in the project.

Project overview (1):

- Project Name
- Number of active Changes
- Number of overdue Changes

Visualization of changes:

- Bar chart by priority: Shows the distribution of Changes by priority level (2)
- Graphical representation of all Changes by type (3)
- Tabular list of all changes with the most important information and link to the Change (4)



9.7 Actions

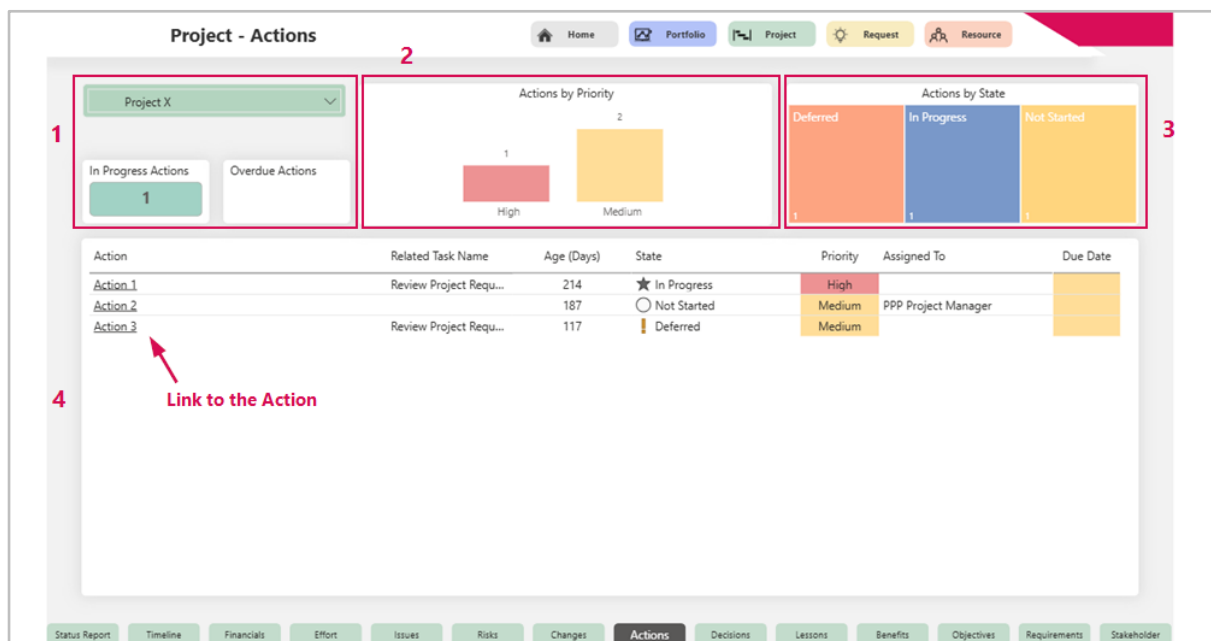
The *Actions* tab provides a detailed overview of all actions in the project.

Project overview (1):

- Project Name
- Number of active Actions
- Number of overdue Actions

Visualization of Actions:

- Bar chart by priority: Shows the distribution of Actions by priority level (2)
- Graphical representation of all Actions by status (3)
- Tabular list of all Actions with the most important information and a link to the Action (4)



9.8 Decisions

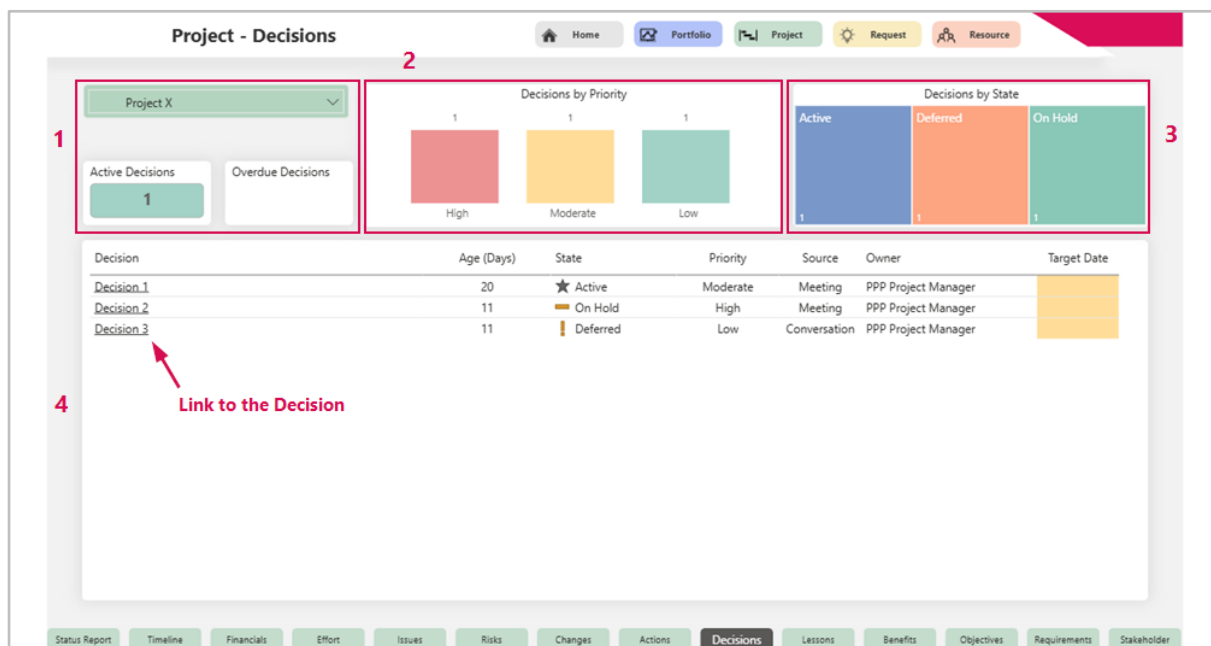
The *Decisions* tab provides a detailed overview of all decisions in the project.

Project overview (1):

- Project Name
- Number of active Decisions
- Number of overdue Decisions

Visualization of Decisions:

- Bar chart by priority: Shows the distribution of Decisions by priority level (2)
- Graphical representation of all Decisions by status (3)
- Tabular list of all decisions with the most important information and a link to the Decision (4)



9.9 Lessons

The *Lessons* tab provides a detailed overview of all lessons learned in the project:

Project overview (1):

- Project Name
- Number of successful Lessons
- Number of problematic Lessons

Filter by rating:

- Use the slider to display only lessons with specific ratings. (2)

Visualization of Lessons Learned:

- Graphical representation of all lessons by knowledge area (3)
- Tabular list of all goals with the most important information and link to the lesson (4)

The screenshot shows the 'Project - Lessons' interface. At the top, there are navigation tabs: Home, Portfolio, Project, Request, and Resource. The main content area is divided into several sections:

- 1**: Project overview showing 'Project X' and two buttons: 'Success Lessons' (3) and 'Problem Lessons' (2).
- 2**: 'Lessons by Rating' section with a slider ranging from 2 to 5.
- 3**: 'Lessons by Knowledge Area' bar chart showing counts for: Communicat... (1), Cost Manag... (1), Risk Manag... (1), Scope Mana... (1), and Time Manag... (1).
- 4**: A table of lessons with a red arrow pointing to the 'Lesson 5' row, labeled 'Link to the Lesson'.

Lesson	Type	Description	Knowledge Area	Star Rating
Lesson 1	Success		Communications Management	★★★★
Lesson 2	Problem		Risk Management	★★
Lesson 3	Success		Time Management	★★★★
Lesson 4	Success		Cost Management	★★★★★
Lesson 5	Problem		Scope Management	★★

At the bottom, there is a navigation bar with tabs: Status Report, Timeline, Financials, Effort, Issues, Risks, Changes, Actions, Decisions, Lessons (selected), Benefits, Objectives, Requirements, and Stakeholder.

9.10 Benefits

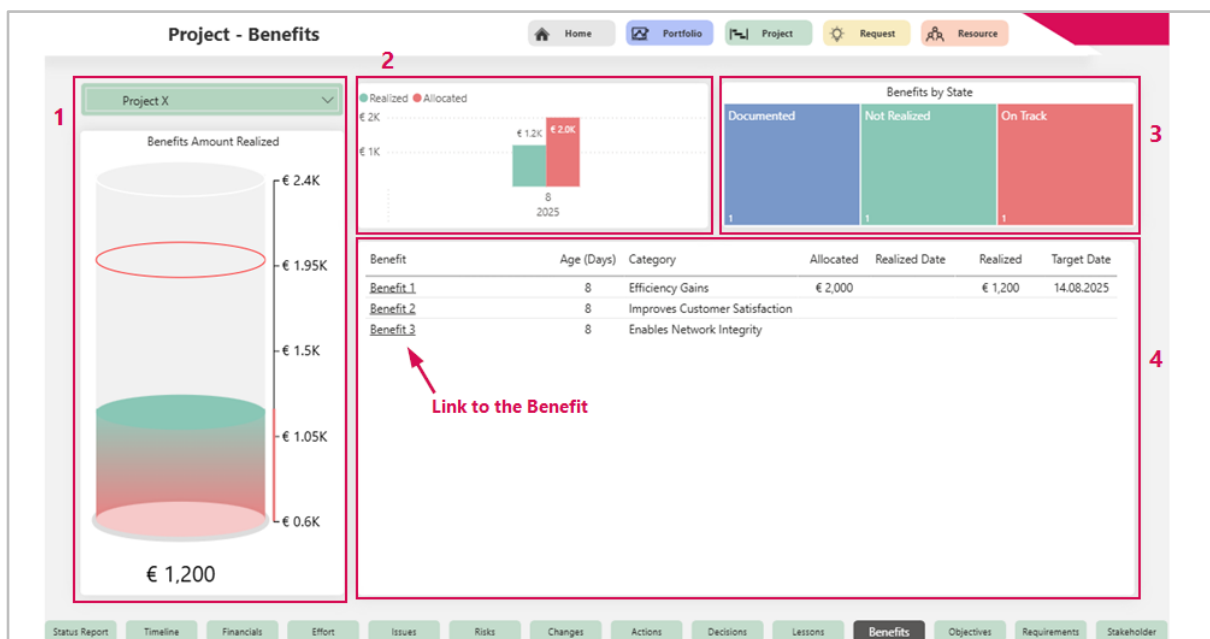
The *Benefits* tab provides a detailed overview of all benefits in the project.

Project overview (1):

- Project Name
- Visualization of the realized Benefits as a bar chart

Visualization of the Benefits:

- Bar chart: Comparison between realized Benefits and allocated Benefits (2)
- Graphical representation of all Benefits by status (3)
- Tabular list of all Benefits with the most important information and link to the Benefit (4)



9.11 Objectives

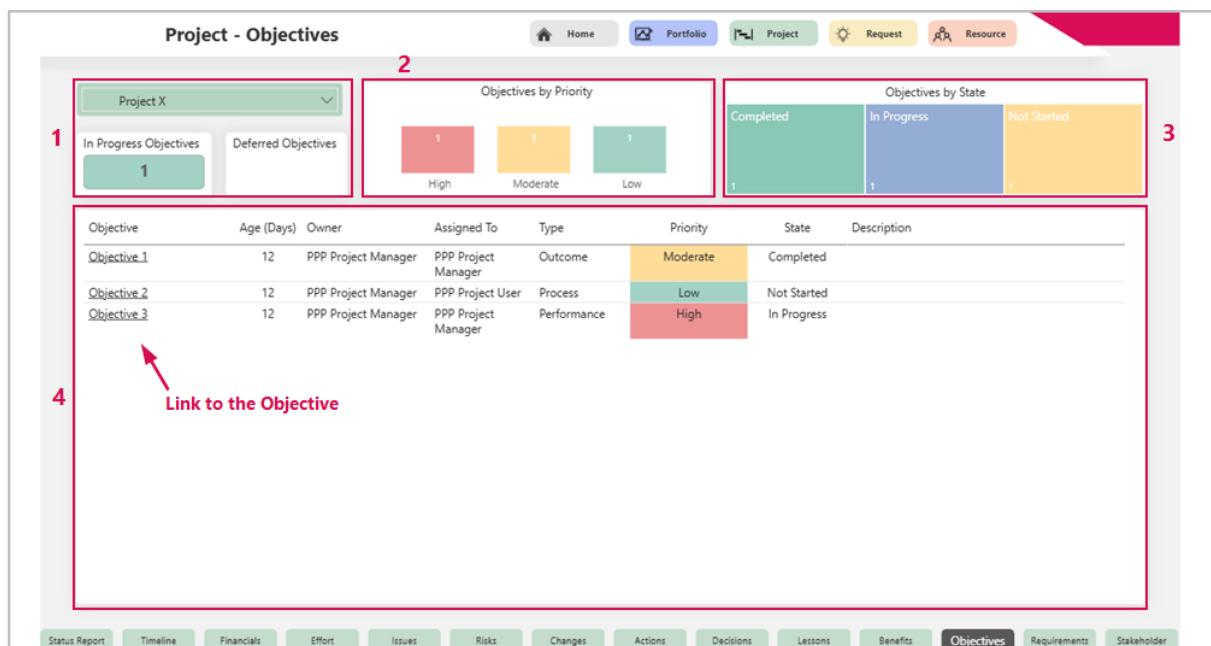
The *Objectives* tab provides a detailed overview of all objectives in the project.

Project overview (1):

- Project Name
- Number of active Objective
- Number of postponed Objectives

Visualization of Objectives:

- Bar chart by priority: Shows the distribution of objectives by priority level (2)
- Graphical representation of all objectives by status (3)
- Tabular list of all objectives with the most important information and link to the objective (4)



9.12 Requirements

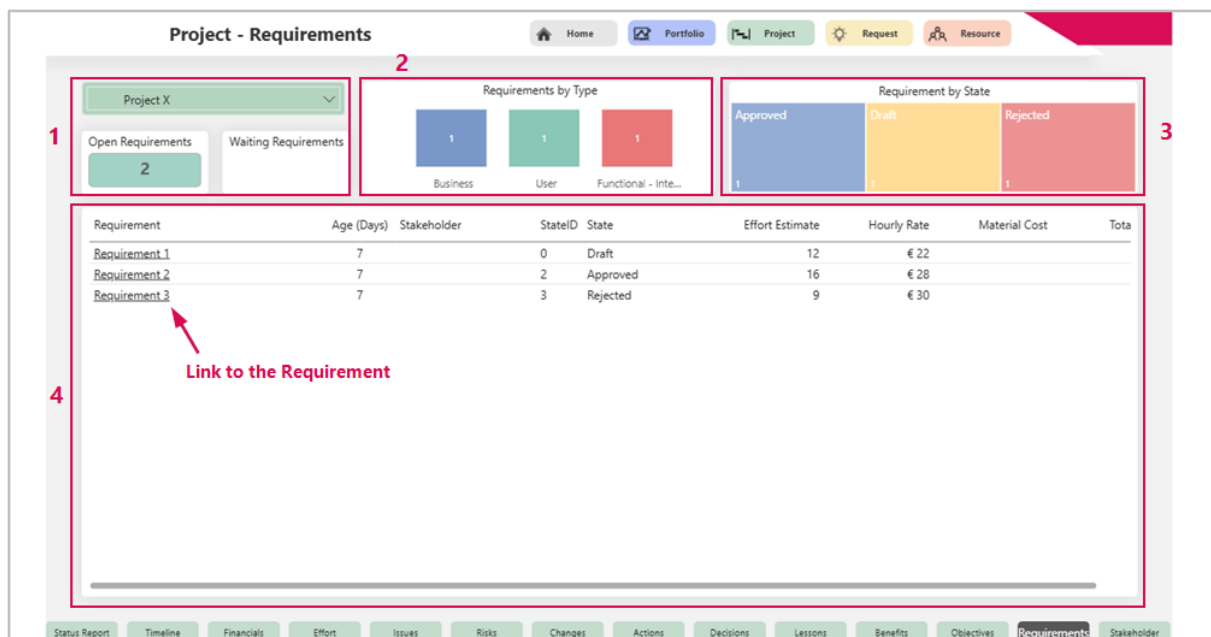
The *Requirements* tab provides a detailed overview of all requirements in the project.

Project overview (1):

- Project Name
- Number of open Requirements
- Number of Requirements in waiting status

Visualization of Requirements:

- Bar chart by type: Shows the distribution of Requirements by type (2)
- Graphical representation of all Requirements by status (3)
- Tabular list of all Requirements with the most important information and link to the Requirement (4)



9.13 Stakeholder

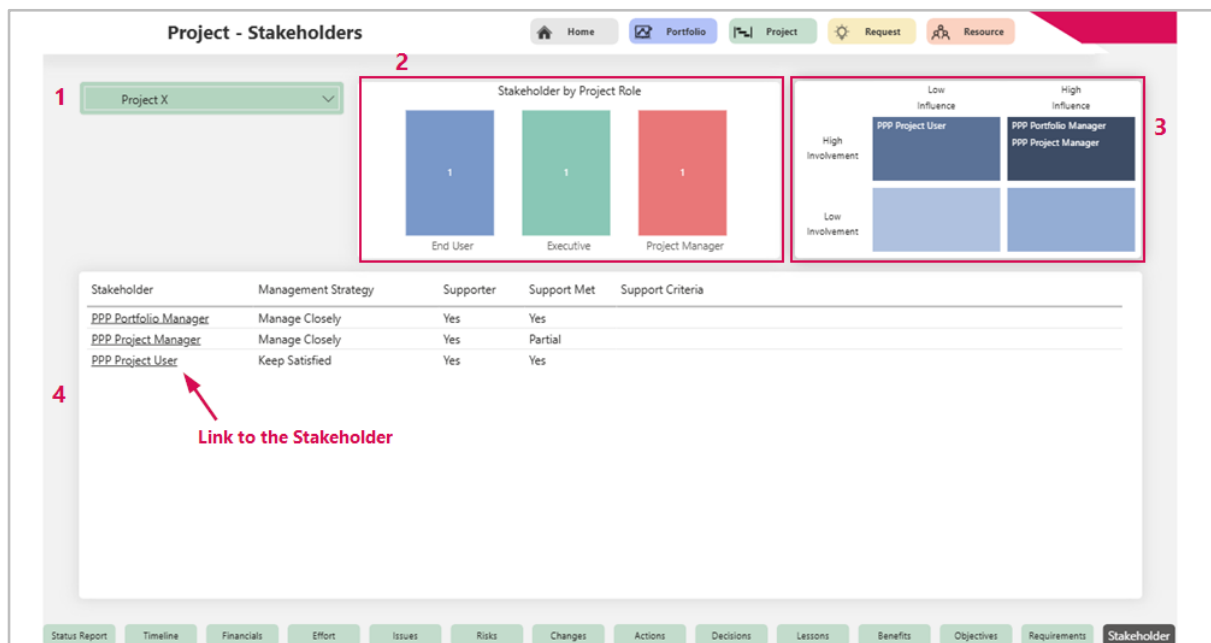
The *Stakeholders* tab provides a detailed overview of all stakeholders in the project.

Project overview (1):

- Project Name

Visualization of Stakeholders:

- Bar chart by role: Shows the distribution of Stakeholders by role in the project (2)
- Graphical representation by involvement and influence: Visualizes Stakeholders according to their contribution and influence on the project (3)
- Tabular list of all Stakeholders with the most important information and link to the Stakeholder (4)








10 Risks

On the *Risks* tab, you will find a tabular list of all risks and a risk matrix that visualizes risks based on their likelihood and consequences.

The Risk Matrix is a useful tool for identifying and prioritizing risks. Each risk is positioned in the matrix according to its likelihood and the severity of its potential consequences.

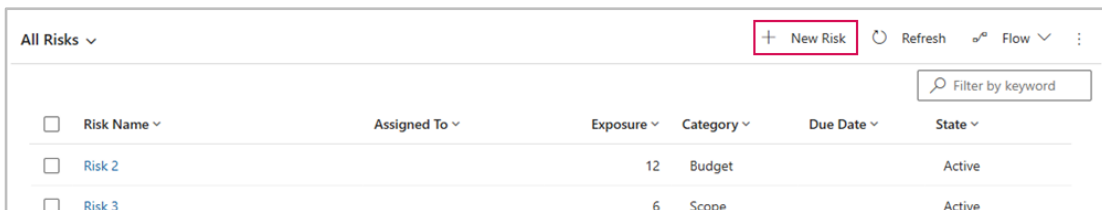
In this section, you will learn how to:

- [Add Risks](#)  121
- [Edit Risks](#)  125
- [Deactivate and Activate Risks](#)  126
- [Read the Risk Matrix and set filters](#)  128
- [Use additional Commands for Risks](#)  129

10.1 Add Risks

To add a *Risk*, proceed as follows:

- Click on *New Risk*. ► The *Quick Create: Risk* form for creating a risk opens.



<input type="checkbox"/>	Risk Name ▾	Assigned To ▾	Exposure ▾	Category ▾	Due Date ▾	State ▾
<input type="checkbox"/>	Risk 2		12	Budget		Active
<input type="checkbox"/>	Risk 3		6	Scope		Active

Quick Create: Risk [X]

General

Risk Name * ---

Project * [Project X] [Search]

Owner * [PPP Project Manager (Offline)] [Search]

Assigned To --- [Search]

Category --- [v]

Due Date --- [Calendar]

State Active [v]

Exposure

Likelihood * [Slider] 0

Consequence * [Slider] 0

Cost ---

Trigger --- [v]

Details

Description ---

Mitigation Plan ---

Contingency Plan ---

Trigger Description ---

[Save and Close] [Cancel]

➤ Fill out the form:

▶ To add a Risk, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

▪ **General:**

- **Risk Name:** Enter a meaningful name for the Risk.
- **Project:** The current project is selected by default.
- **Owner:** Creator of the risk. The current user is entered by default.

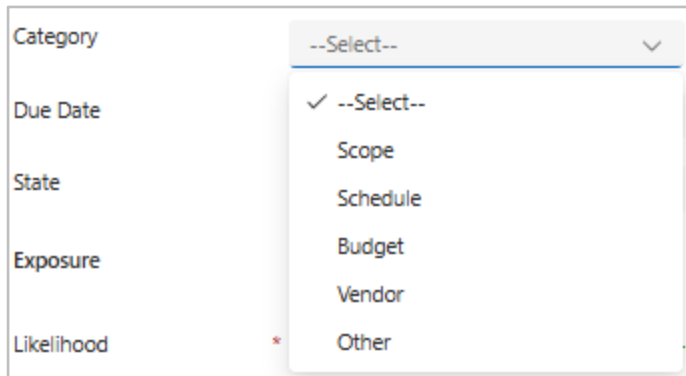
▶ You can select a different project or owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

▪ **Assigned To:** Stakeholder to whom the Risk is assigned.

➤ Click in the input field, press the Enter key, and enter the desired stakeholder.

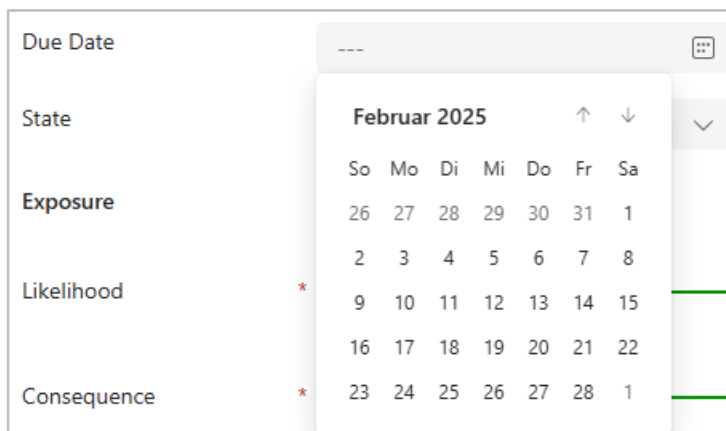
▪ **Category:**

➤ Click in the field and select the desired category from the drop-down menu.



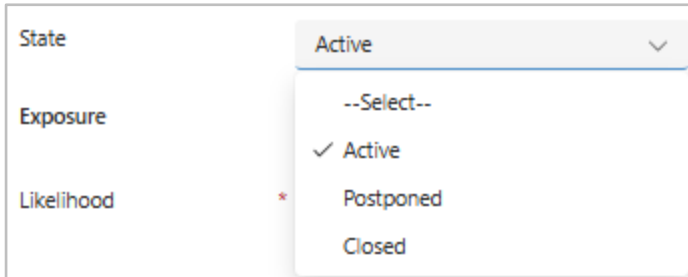
▪ **Due Date:**

➤ Click on the calendar icon and enter the due date.



- **State:**

- Click in the field and select the desired status from the drop-down menu.



- **Exposure:**

- **Likelihood:** Probability that the Risk will occur.

- Use the five-point slider (1 = minimum, 5 = maximum) to set the likelihood.

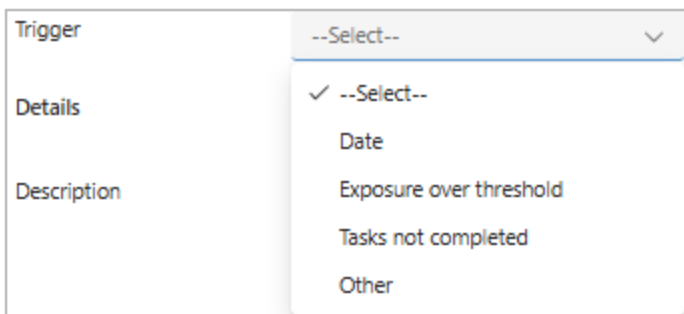
- **Consequence:** Severity of the impact if the Risk occurs.

- Use the five-point slider to determine the severity of the potential impact.

- **Cost:** Enter an amount.

- **Trigger:**

- Click in the field and select the trigger from the drop-down menu.



- **Details:**

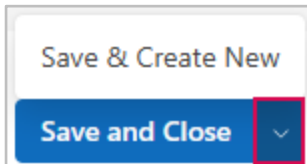
- **Description, Mitigation Plan, Contingency Plan, Trigger Description:**

- Enter meaningful descriptions in the appropriate fields.

➤ Click *Save and Close*.

Or

➤ Click the down arrow and *Save & Create New* to add another Risk.



▶ A Risk is added.

▶ The Risk appears in the *All Risks* table.

10.2 Edit Risks

A Risk can be edited as follows:

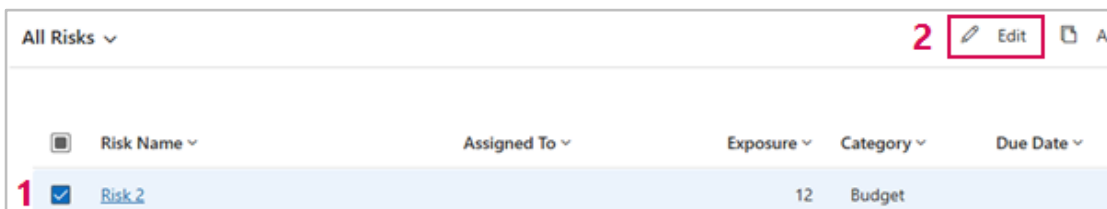
➤ Click on the preview in the *Risk Name* column. ▶ The form for editing the Risk opens.



Or

➤ Click on the row of the desired Risk to select it. (1)

➤ Click on *Edit*. (2)



➤ Enter the desired changes in the form.

- Click *Save & Close* to save the changes and finish editing.

Risk 2 - Saved
Risk

General

Risk Name * Risk 2

Owner * PPP Project Manager (Offline) ×

-
- ▶ Only Risks with the status Active can be edited. Deactivated Risks are locked for editing.
-

10.3 Deactivate and Activate Risks

Risks are active by default. You can deactivate Risks:

- Select the Risk you want to deactivate.
- Click on the Risk row to highlight it. (1)
- Click on *Deactivate*. (2)

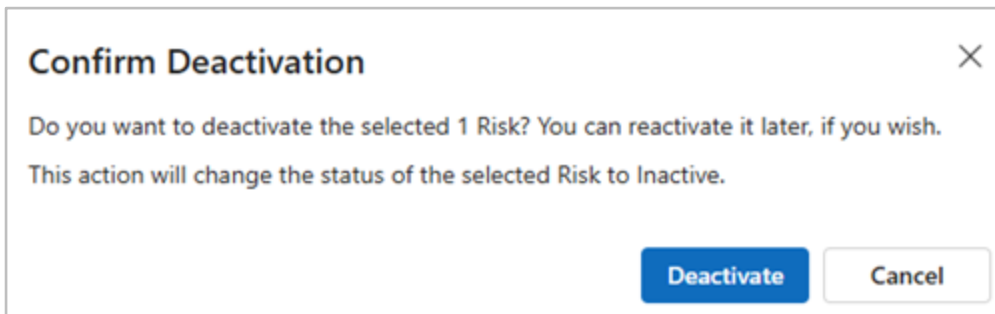
All Risks ▾ Edit Activate Deactivate ⋮

Filter by keyword

<input type="checkbox"/>	Risk Name ▾	Assigned To ▾	Exposure ▾	Category ▾	Due Date ▾	State ▾
1 <input checked="" type="checkbox"/>	Risk 2		12	Budget		Active

- ▶ The *Confirm Deactivation* field opens.

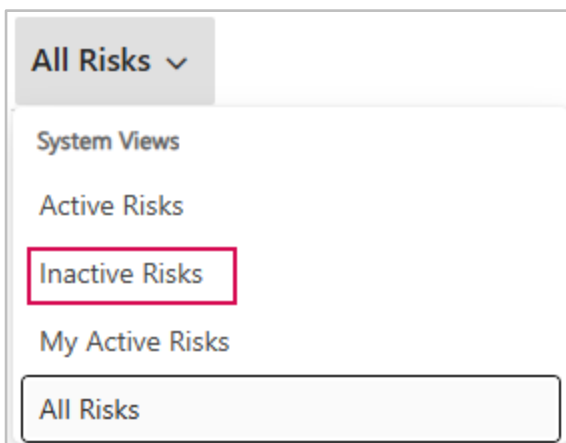
- Click *Deactivate* to deactivate the Risk.



By default, all active and inactive Risks are listed in the table.

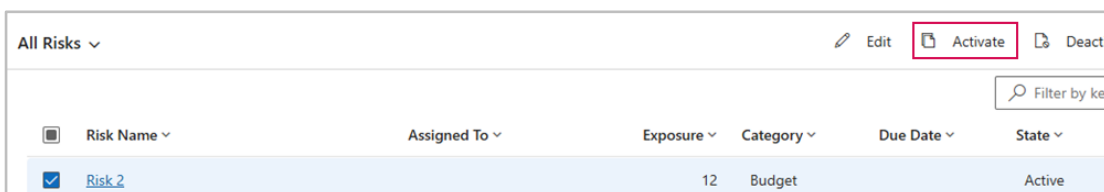
Display only inactive Risks:

- Go to *All Risks*.
- Click the down arrow.
- Click on *Inactive Risks*.



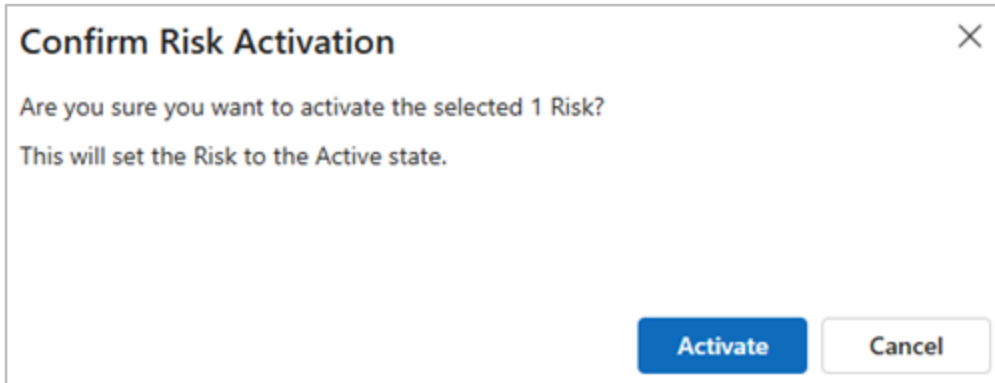
Activate Risks:

- Select the Risk as described above.
- Click on *Activate*.



- ▶ The *Confirm Risk Activation* field opens.

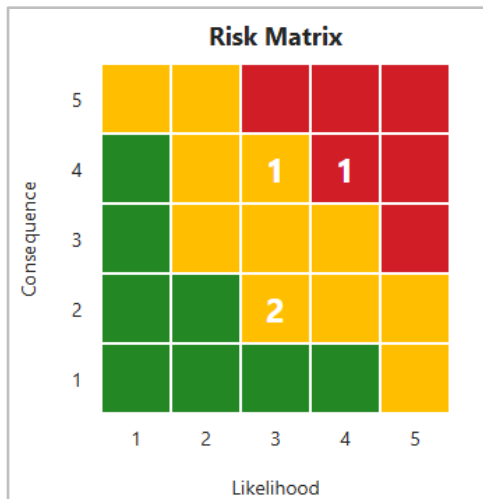
➤ Click on *Activate* to activate the Risk.



10.4 Risk Matrix

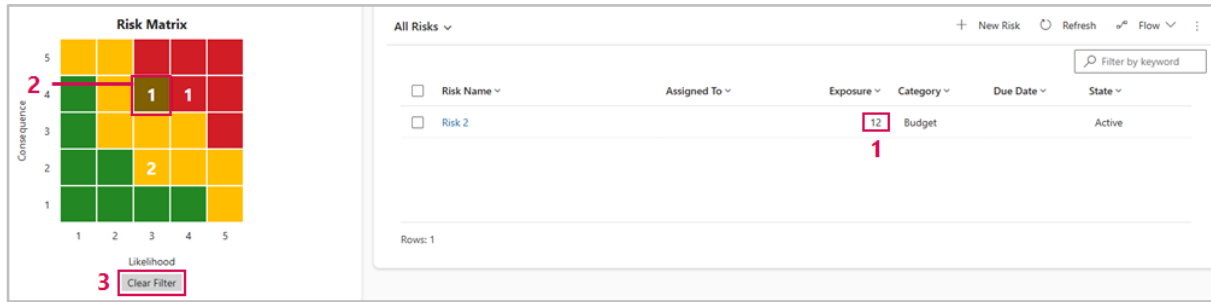
The *Risks* tab displays a Risk Matrix that shows the number of Risks per likelihood and consequence.

▶ The number is displayed as a white digit in the respective fields of the matrix.



The exposure is calculated from the *Likelihood* and *Consequence* values. The following formula applies:

$$\text{Exposure} = \text{Likelihood} * \text{Consequence (1)}$$



Filter Risks by likelihood and consequence:

- Click on the corresponding field in the matrix (2).
- ▶ Only Risks with the selected combination of likelihood and consequence are displayed in the table.

Remove filter:

- Click on the field in the matrix again (2).

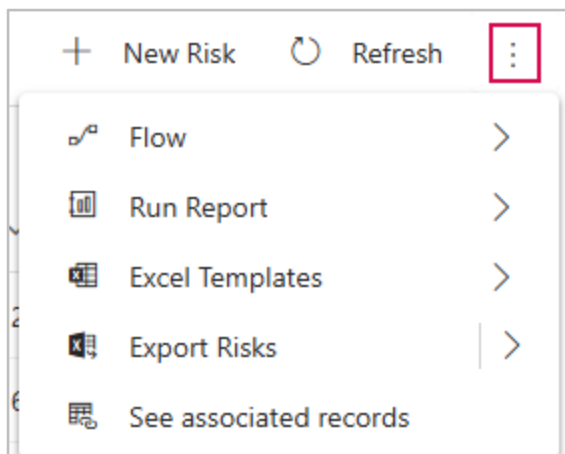
Or

- Click on *Clear Filter* (3).

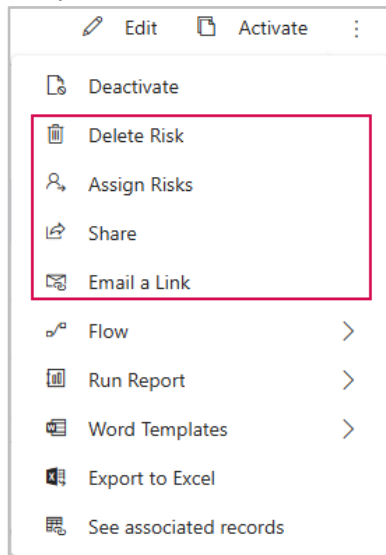
10.5 Additional Commands for Risks

Above the *All Risks* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected a Risk, additional commands related to the selected Risk will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Risk*: Permanently deletes the selected Risk.





⚠ This action cannot be undone.

-
- *Assign Risks*: Changes the owner of the selected Risk.
 - *Share*: Shares the Risk with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Risk via email.
 - *Flow*: Runs a flow for the Risk.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

11 Issues

The *Issues* tab allows you to centrally record and manage project-related challenges or obstacles. This feature helps project teams keep track of open issues, assign responsibilities, and document progress in resolving issues.


In this section, you will learn how to:

- [Add Issues](#)  131
- [Edit Issues](#)  135
- [Deactivate and Activate Issues](#)  136
- [Use additional Commands for Issues](#)  137

11.1 Add Issues

To add an *Issue*, proceed as follows:

- Click on *New Issue*. ► The *Quick Create: Issue* form for creating an Issue opens.

Active Issues + New Issue Refresh				
<input type="checkbox"/>	Issue Name 1 ▼	Assigned To ▼	Priority ▼	Category ▼
<input type="checkbox"/>	Problem 2	 PPP Project Manager (Offline)	Medium	Schedule

Quick Create: Issue ✕

General

Issue Name *

Project * ✕

Owner * ✕

Status

Assigned To

Discussion

Category

Due Date

Priority

Resolution

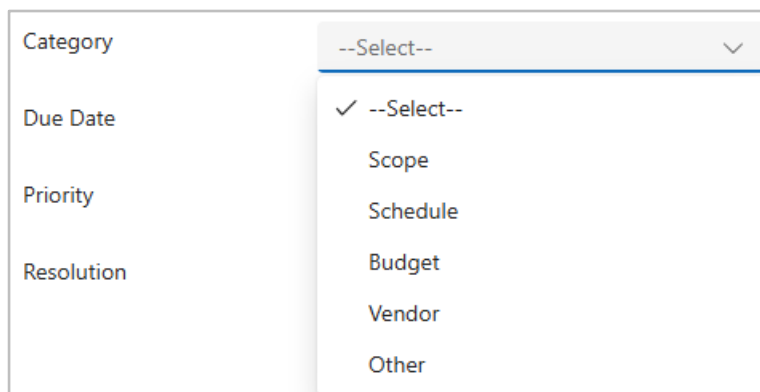
➤ Fill out the form:

▶ To add an Issue, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- **General:**
 - **Issue Name:** Enter a meaningful name for the Issue.
 - **Project:** The current project is selected by default.
 - **Owner:** Creator of the Issue. The current user is entered by default.

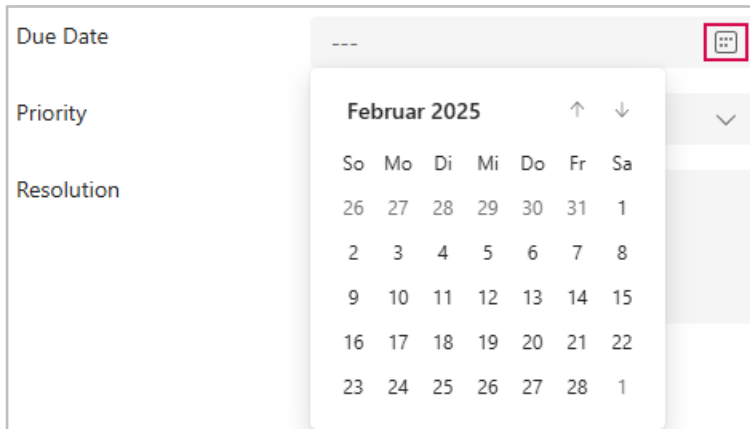
▶ You can select a different project or owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

- **Status:**
 - Click in the field and select the desired status from the drop-down menu.
- **Assigned To:** Stakeholder to whom the risk is assigned.
 - Click on the input field, press the Enter key, and enter the desired name.
- **Discussion:** Enter the discussion points for the Issue.
- **Category:**
 - Click in the field and select the desired category from the drop-down menu.



- **Due Date:**

- Click on the calendar icon and enter the due date.



- **Priority:**

- Click in the field and select the priority of the Issue from the drop-down menu.

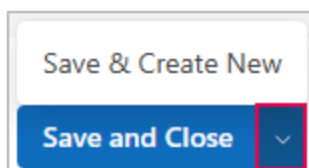
- **Resolution:**

- Enter a description of the resolution.

- Click *Save and Close*.

Or

- Click the down arrow and *Save & Create New* to add another Issue.



- ▶ An Issue is added.

- ▶ The Issue appears in the *Active Issues* table.

11.2 Edit Issues

An Issue can be edited as follows:

- Click on the preview in the *Issue Name* column. ▶ The form for editing the Issue opens.

<input type="checkbox"/>	Issue Name ↑ ▾	Assign
<input type="checkbox"/>	Problem 1	

Or

- Click on the row of the desired Issue to select it. (1)
- Click on *Edit*. (2)

Active Issues ▾				2	Edit	Ad
<input type="checkbox"/>	Issue Name ↑ ▾	Assigned To ▾	Priority ▾	Category ▾		
1	<input checked="" type="checkbox"/> Problem 1		High	Vendor		

- Enter the desired changes in the form.
- Click *Save & Close* to save the changes and finish editing.

← ↗ 🔄 💾 Save 📄 Save & Close 🚫 Deactivate

Problem 1 - Saved

Issue

General

Issue Name *

-
- ▶ Only Issues with the status Active can be edited. Deactivated Issues are locked for editing.
-

11.3 Deactivate and Activate Issues

Issues are active by default. You can deactivate Issues:

- Select the Issue you want to deactivate.
- Click on the Issue row to highlight it. (1)
- Click on *Deactivate*. (2)

The screenshot shows a table titled 'Active Issues' with columns: Issue Name, Assigned To, Priority, Category, and State. A single row is visible with 'Problem 1' in the Issue Name column and 'Active' in the State column. The 'Deactivate' button in the top right corner of the table is highlighted with a red box and the number '2'.

Issue Name	Assigned To	Priority	Category	State
Problem 1		High	Vendor	Active

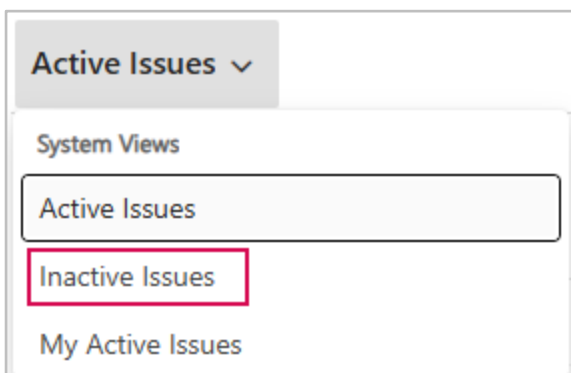
- ▶ The *Confirm Deactivation* field opens.
- Click *Deactivate* to deactivate the Issue.

The dialog box is titled 'Confirm Deactivation' and contains the text: 'Do you want to deactivate the selected 1 Issue? You can reactivate it later, if you wish. This action will change the status of the selected Issue to Inactive.' At the bottom right, there are two buttons: 'Deactivate' (in blue) and 'Cancel' (in white).

By default, all active and inactive Issues are listed in the table.

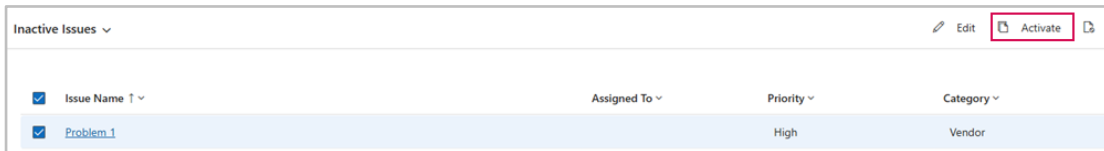
Display only inactive Issues:

- Go to *Active Issues*.
- Click the down arrow.
- Click on *Inactive Issues*.

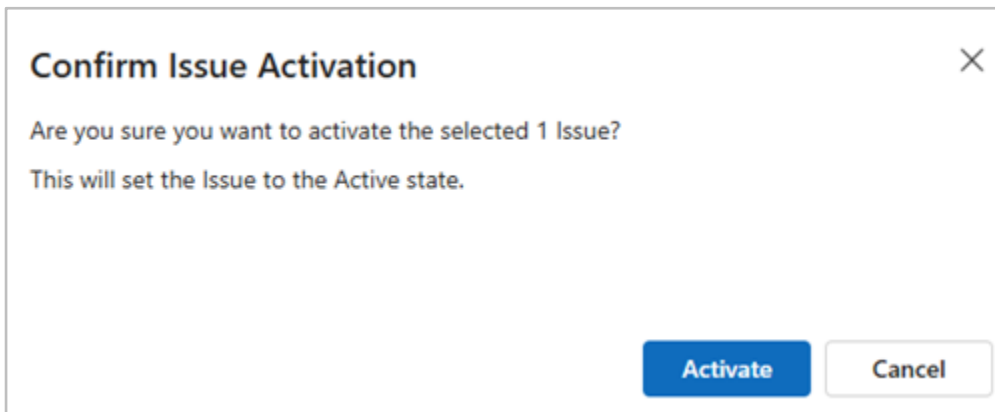


Activate Issues:

- Select the Issue as described above.
- Click on *Activate*.



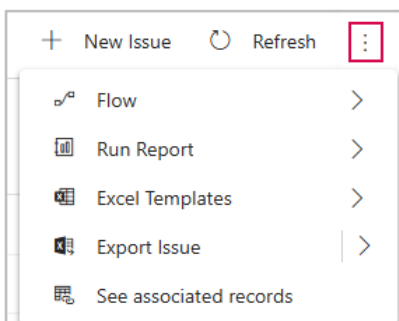
- ▶ The *Confirm Issue Activation* field opens.
- Click on *Activate* to activate the Issue.



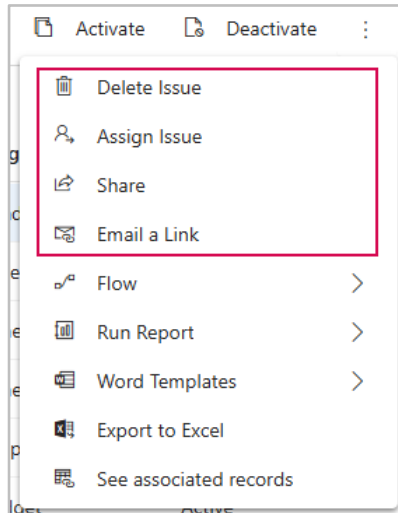
11.4 Additional Commands for Issues

Above the *Active Issues* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected an Issue, additional commands related to the selected Issue will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Issue*: Permanently deletes the selected Issue.




⚠ This action cannot be undone.

-
- *Assign Issue*: Changes the owner of the selected Issue.
 - *Share*: Shares the Issue with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Issue via email.
 - *Flow*: Runs a flow for the Issue.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

12 Changes

The *Changes* tab allows you to document and track planned or implemented adjustments within a project. This feature enables project teams to record changes in a structured manner, assign responsibilities, and manage the status of individual change requests transparently.

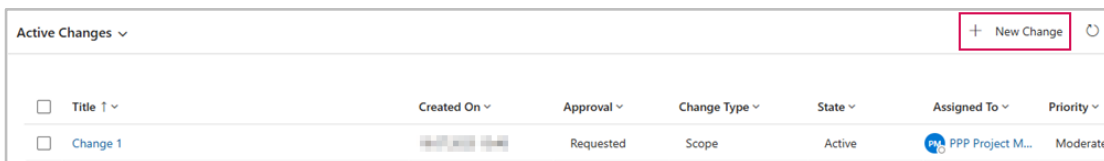
In this section, you will learn how to:

- [Add Changes](#)  139
- [Edit Changes](#)  145
- [Deactivate and Activate Changes](#)  146
- [Use additional Commands for Changes](#)  148

12.1 Add Changes

To add a *Change*, proceed as follows:

- Click on *New Change*. ► The *Quick Create: Change* form for creating a Change opens.



Active Changes ▾							+ New Change	↻
<input type="checkbox"/>	Title ▾	Created On ▾	Approval ▾	Change Type ▾	State ▾	Assigned To ▾	Priority ▾	
<input type="checkbox"/>	Change 1		Requested	Scope	Active	PPP Project M...	Moderate	

Quick Create: Change

General

Title * ---

Project * Project X

Details ---

Owner * PPP Project Manager (Offline)

Requested By ---

Assigned To ---

Requested Date ---

Change Type ---

Planned Start Date ---

Planned End Date ---

State ---

Approval Not Yet Requested

Priority ---

Risk None

Impact ---

Cost Impact ---

Additional Comments ---

Work Notes ---

Benefits ---

Change Plan ---

Backout Plan ---

Save and Close Cancel

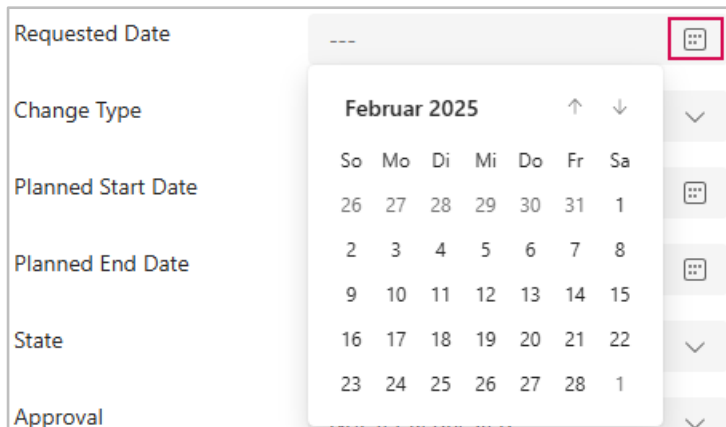
- Fill out the form:

▶ To add a Change, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- **General:**
 - **Title:** Enter a meaningful title for the Change.
 - **Project:** The current project is selected by default.
- **Details:**
 - Enter a meaningful description of the Change.
- **Owner:** Creator of the Change. The current user is entered by default.

▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

- **Requested By:** Stakeholder requesting the Change.
 - Click on the input field, press the Enter key, and enter the desired name.
- **Assigned To:** Stakeholder to whom the Change is assigned.
 - Click on the input field, press the Enter key, and enter the desired name.
- **Requested Date, Planned Start Date, Planned End Date:**
 - Click on the calendar icon and enter the date.



▪ **Change Type:**

➤ Click in the field and select the type of Change from the drop-down menu. .

A screenshot of a software interface showing a form with several fields. The 'Change Type' field is highlighted, and its dropdown menu is open. The menu options are: --Select-- (selected), Scope, Schedule, Cost, and None. Other visible fields include 'Planned Start Date', 'Planned End Date', and 'State'.

▪ **State:**

➤ Click in the field and select the status from the drop-down menu.

A screenshot of a software interface showing a form with several fields. The 'State' field is highlighted, and its dropdown menu is open. The menu options are: --Select-- (selected), Active, Postponed, and Closed. Other visible fields include 'Approval', 'Priority', and 'Risk'.

▪ **Approval:**

➤ Click in the field and select the approval status from the drop-down menu.

A screenshot of a software interface showing a form with several fields. The 'Approval' field is highlighted, and its dropdown menu is open. The menu options are: Not Yet Requested (selected), --Select--, Not Yet Requested, Requested, Approved, and Rejected. Other visible fields include 'Priority', 'Risk', and 'Impact'.

▪ **Priority:**

- Click in the field and select the priority from the drop-down menu.

A screenshot of a form with a dropdown menu for the 'Priority' field. The dropdown is open, showing the following options: --Select-- (selected), Critical, High, Moderate, and Low. The 'Priority' field is currently selected.

▪ **Risk:**

- Click in the field and select the risk from the drop-down menu.

A screenshot of a form with a dropdown menu for the 'Risk' field. The dropdown is open, showing the following options: None (selected), --Select--, Very High, High, Moderate, Low, and None (checked). The 'Risk' field is currently selected.

▪ **Impact:**

- Click in the field and select the impact from the drop-down menu..

A screenshot of a form with a dropdown menu for the 'Impact' field. The dropdown is open, showing the following options: --Select-- (selected), --Select-- (checked), High, Medium, and Low. The 'Impact' field is currently selected.

▪ **Cost Impact:**

- Enter an amount.

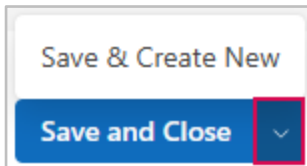
- *Additional Comments, Work Notes, Benefits, Change Plan, Backout Plan, Test Plan:*

- Enter meaningful descriptions in the appropriate fields. .

- Click *Save and Close*.

Or

- Click the down arrow and *Save & Create New* to add another Change.



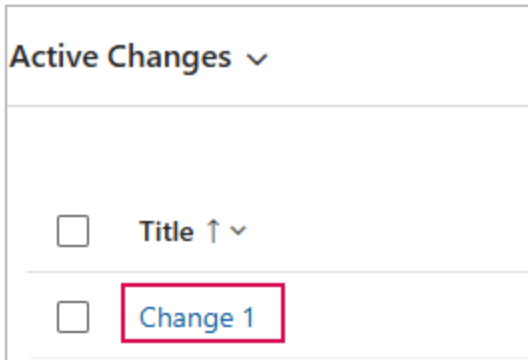
- ▶ A Change has been added.

- ▶ The Change appears in the *Active Changes* table.

12.2 Edit Changes

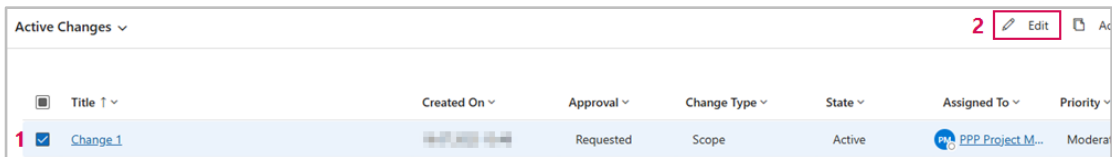
A Change can be edited as follows:

- Click on the preview in the *Title* column. ▶ The form for editing the Change opens.

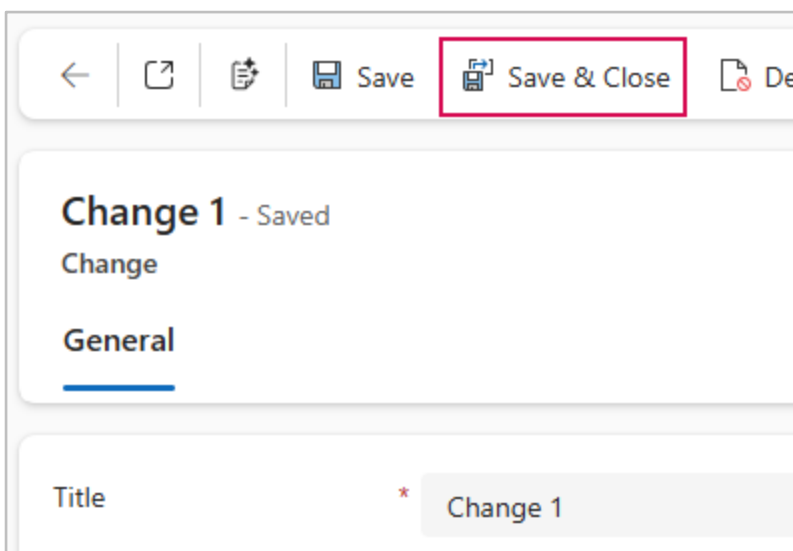


Or

- Click on the row of the desired Change to select it. (1)
- Click on *Edit*. (2)



- Enter the desired change in the form.
- Click *Save & Close* to save the changes and finish editing.

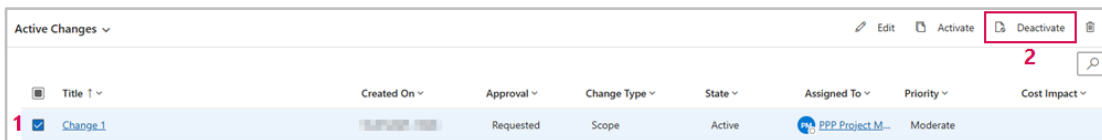


- ▶ Only Changes with the status Active can be edited. Deactivated Changes are locked for editing.

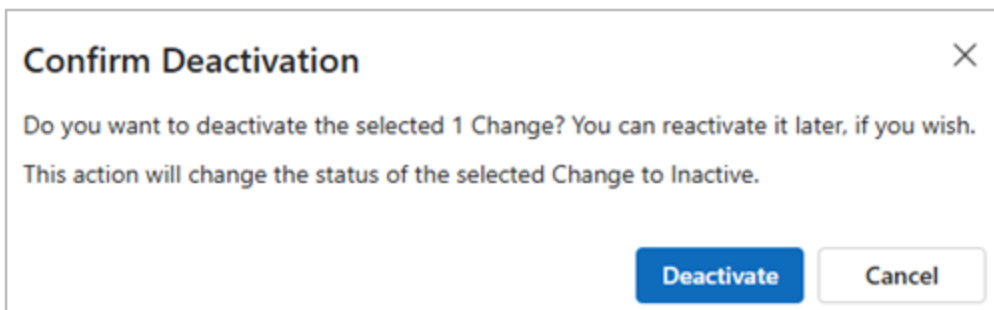
12.3 Deactivate and Activate Changes

Changes are active by default. You can deactivate Changes:

- Select the Change you want to deactivate.
- Click on the Change row to highlight it. (1)
- Click on *Deactivate*. (2)



- ▶ The *Confirm Deactivation* field opens.
- Click *Deactivate* to deactivate the Change.

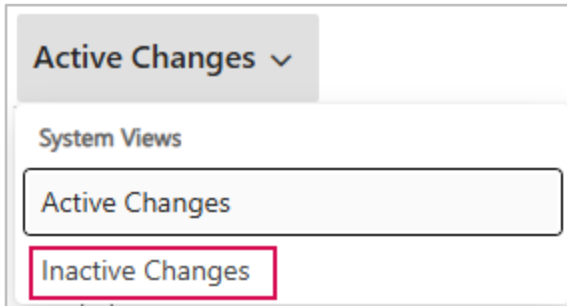


By default, all active and inactive Changes are listed in the table.

Display only inactive changes:

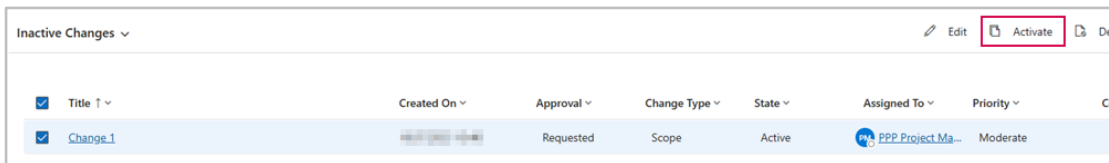
- Go to *Active Changes*.
- Click the down arrow.

- Click on *Inactive Changes*.

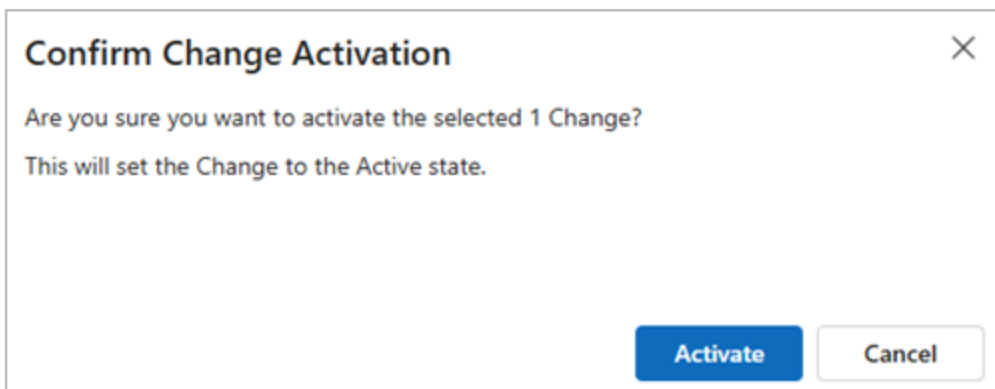


Activate Changes:

- Select the Change as described above.
- Click on *Activate*.



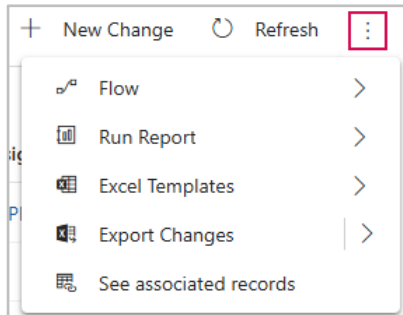
- ▶ The *Confirm Change Activation* field opens.
- Click on *Activate* to activate the change.



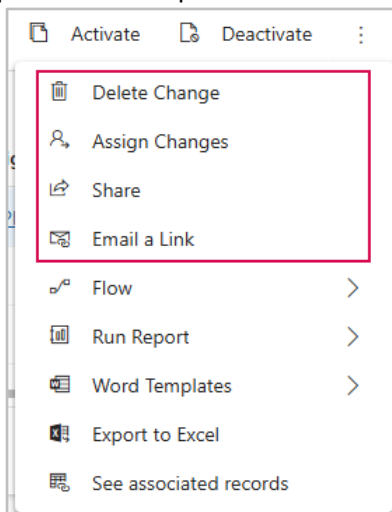
12.4 Additional Commands for Changes

Above the *Active Changes* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ➤ A drop-down menu will open.



- If you have selected a Change, additional commands related to the selected Change will appear in the drop-down menu:



- Select the desired command:

- *Delete Change*: Permanently deletes the selected Change.

⚠ This action cannot be undone.

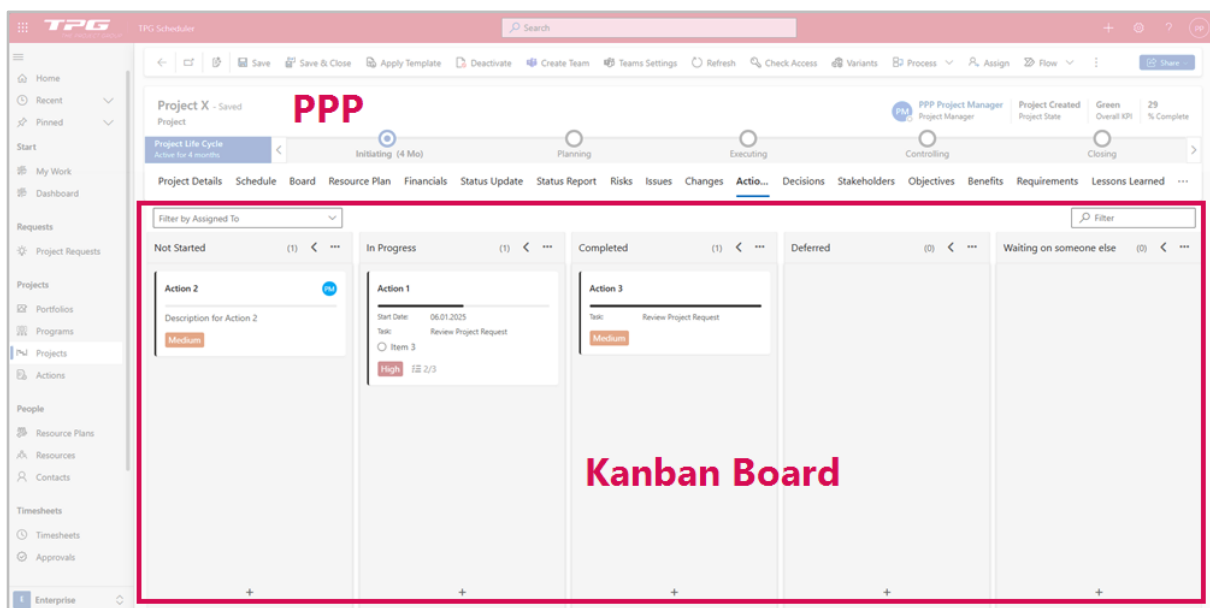
- *Assign Changes*: Changes the owner of the selected Change.
- *Share*: Shares the Change with selected individuals or teams without changing ownership.

- *Email a Link*: Sends a link to the selected Change via email.
- *Flow*: Runs a flow for the Change.
- *Run Report*: Select a report to run.
- *Word Templates*: Creates Word documents and templates.
- *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
- *See associated records*: Shows records associated with this view.

13 Actions

You can assign actions to tasks in the TPG Scheduler. Actions are jobs that are linked to one or more tasks.

A Kanban board is integrated to visualize and manage tasks within a project. This Kanban board can be found on the *Actions* tab. In the following chapter, you will learn how to create, edit and manage actions.

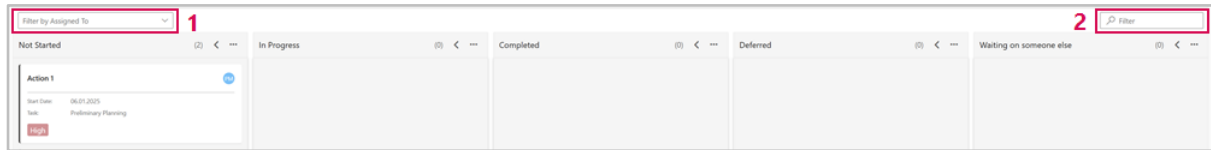


13.1 Actions - current Project

On the *Actions* tab, you can create, edit and organize actions for the current project in a Kanban view.

The actions are grouped by state in columns. There are the following states:

- **Not Started:** The action has not yet been started.
- **In Progress:** The action is being processed.
- **Completed:** The action has been completed.
- **Deferred:** The action is on hold.
- **Waiting on someone else:** The action must be processed by someone.

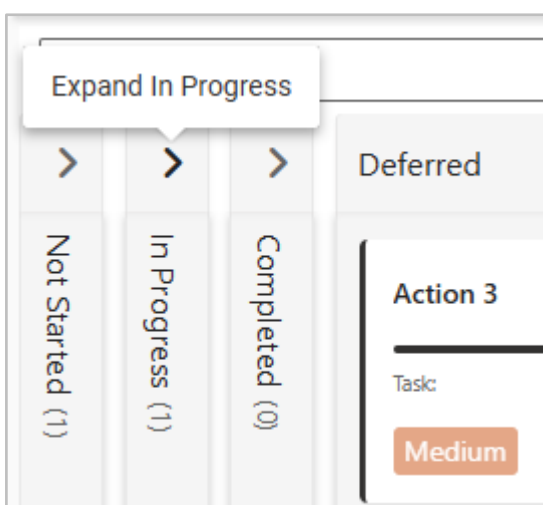
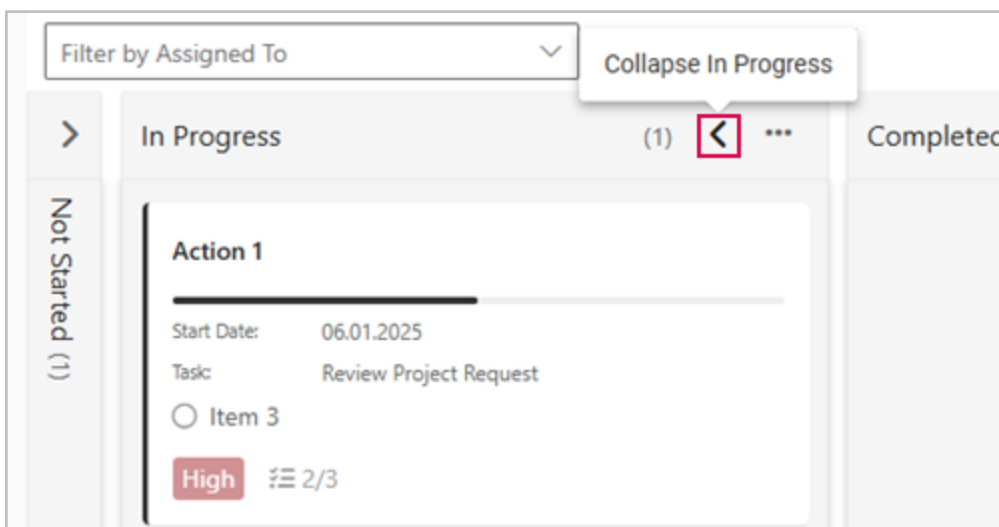


Two filter options are available:

- Filter actions by assigned persons. (1)
- Actions by name and/or content. (2)

For better clarity, you can collapse or expand the columns:

- Select the column you want to collapse or expand.
- Click the arrow pointing left or right in the state column.
- ▶ The column will be collapsed or expanded.



► The Actions can be assigned to tasks in the TPG Scheduler (*Schedule* tab). How to show columns is described under [Task Attributes](#) ⁵⁵.

► The *Schedule* shows how many actions are assigned to the task and whether these actions are open or completed.

#	i	Name	% Complete	Start	Finish	Duration	Predecessors	Assigned Resources	Key Milestone	Effort	Actual Hours	Actions	New Column
1		Project Start	100	23.12.2024	23.12.2024	0 days				0 hours			
2		Phase 1: Initiation	100	23.12.2024	30.01.2025	29 days	1			160 hours			
3		Create Project Request	100	23.12.2024	23.12.2024	1 day		PM		8 hours			
4		Review Project Request	100	06.01.2025	17.01.2025	10 days	3	PM		80 hours			
5		Identify Risks	100	20.01.2025	30.01.2025	9 days	4	PM		72 hours			
6		Initiation Completed	100	30.01.2025	30.01.2025	0 days	5		Customer	0 hours			
7		Phase 2: Planning	81	31.01.2025	27.02.2025	20 days	6			24.5 hours	15		
8		Preliminary Planning	100	31.01.2025	06.02.2025	5 days				8 hours		0 / 1	
9		Detailed Planning	89	07.02.2025	20.02.2025	10 days	8			8.5 hours			
10		Financing	45	21.02.2025	27.02.2025	5 days	9			8 hours			
11		Planning Completed	25	27.02.2025	27.02.2025	0 days	7			0 hours			

Example: 2 actions are assigned to a task. One of these actions has already been completed and one is open.

Actual Hours	Actions	New

1 open, 1 complete

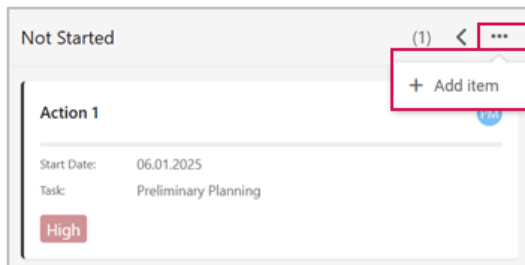
1 / 2

13.1.1 Create Actions

There are two ways to create an action:

- Click on the three dots on the right-hand side of the state column. ► A drop-down menu opens.

➤ Click on *Add item*.

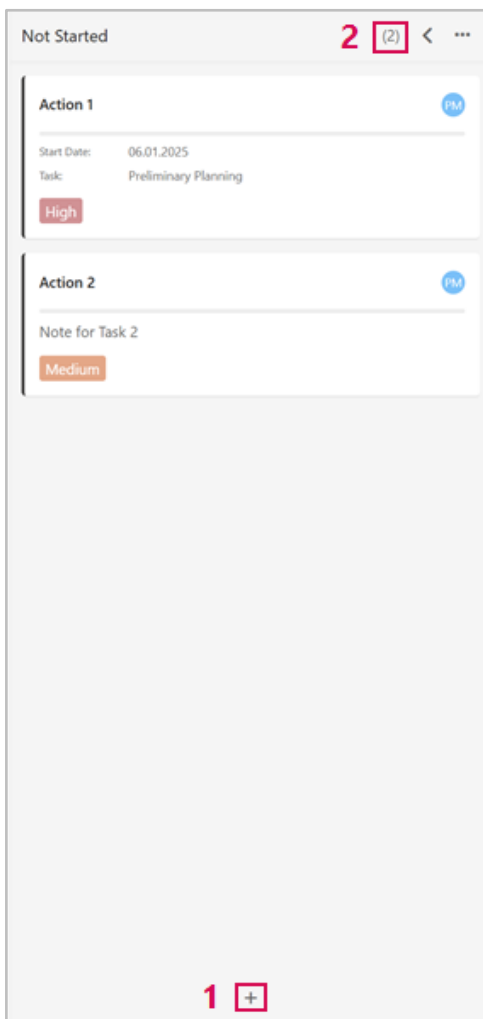


Or

➤ Click on the plus symbol in the state column below. (1)

▶ A new action is created and appears in the state column.

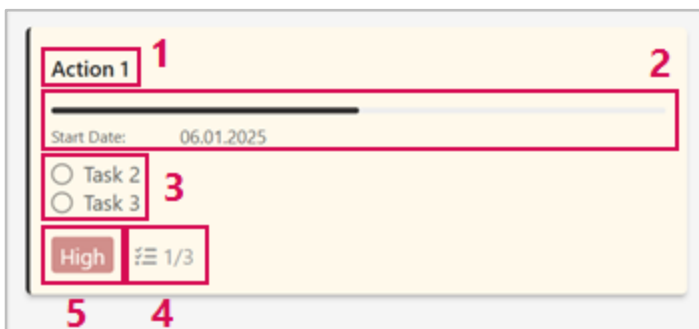
▶ The number of actions in the state column is updated automatically. (2)



13.1.2 Edit Actions

You can edit actions in the Kanban view. Information about the action is displayed in the Kanban view:

- Name of the action (1)
- Progress of the action (2)
- Open tasks within the action (3)
- Completed tasks within the action (4)
- Priority (5)



Change the name of the action:

When you create a new action, the name is *New item* by default.

- Double-click on *New item*. ▶ A text field appears.
- Enter the name for the action.
- ▶ The action is renamed.

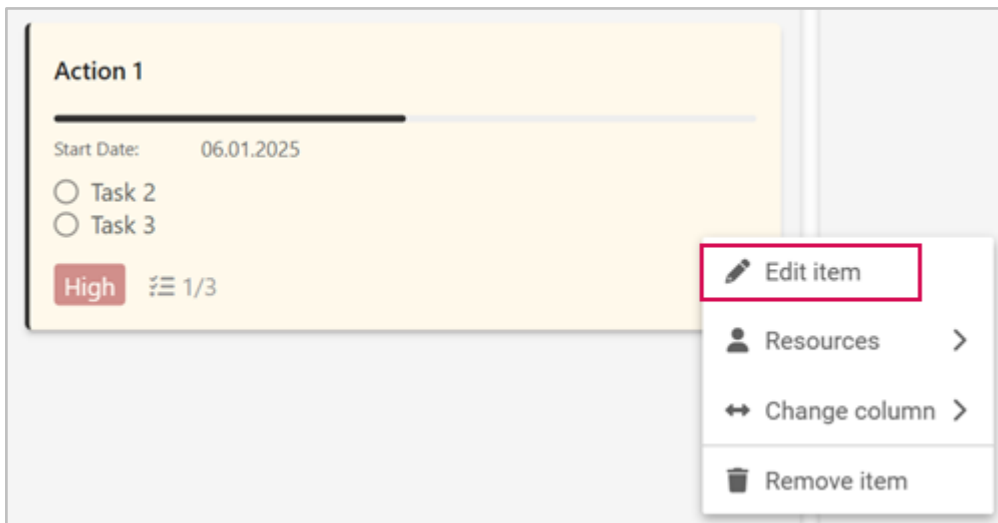
Edit action in the form:

- Double-click on the action.

Or

- Right-click on the action. ▶ A drop-down menu opens.
- Click on *Edit item*.

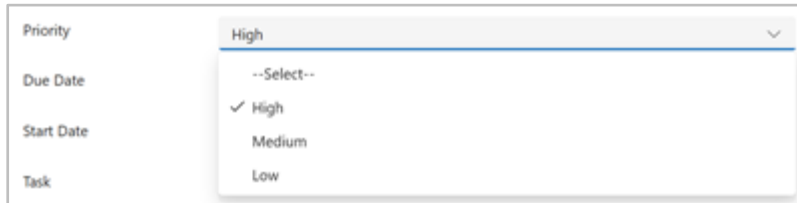
- ▶ The form for editing the action opens.



Fill in the following fields:

- **Title:** Name of the action
 - Click in the text field to edit the name of the action.
- **Project:** Project to which the action is assigned.
 - Click on the search icon (magnifying glass) in the text field to select another project in the drop-down menu to which you want to assign the action.
- **Owner:** Person who created the action.
 - Click on the search icon (magnifying glass) in the text field to select another owner from the drop-down menu.
- **Assigned To:** Person to whom the action is assigned.
 - Click on the search icon (magnifying glass) in the text field to select a person in the drop-down menu to whom the action is to be assigned.
- **%Completed:** Progress bar of the action. The progress is shown as a percentage.
 - Click on the slider and, holding down the mouse button, move it to the desired position to change the progress.
- **Description:** Description of the action.
 - Click in the text field and enter the description.
- **Priority:** Priority of the task.

- Click on the arrow in the text field. ▶ A drop-down menu opens.
- Click on *High, Medium* or *Low*.



- **Due Date:**

- Click in the text field. ▶ The calendar opens.
- Select the due date of the action.

- **Start Date:**

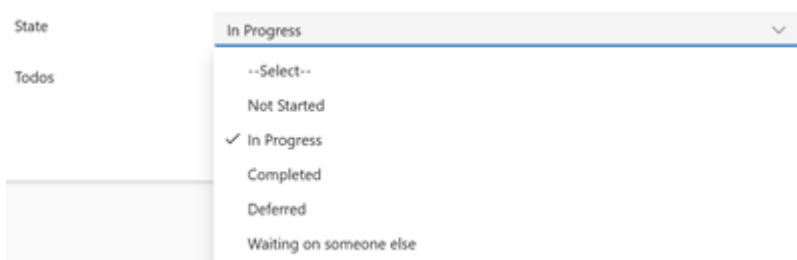
- Click in the text field. ▶ The calendar opens.
- Select the start date of the action.

- **Task:** Assign a task to the action.

- Click in the text field. ▶ A drop-down menu opens.
- Click on the task that you would like to assign to the action.

- **State:** State of the action

- Click in the text field. ▶ A drop-down menu opens.
- Click on the state of the action.



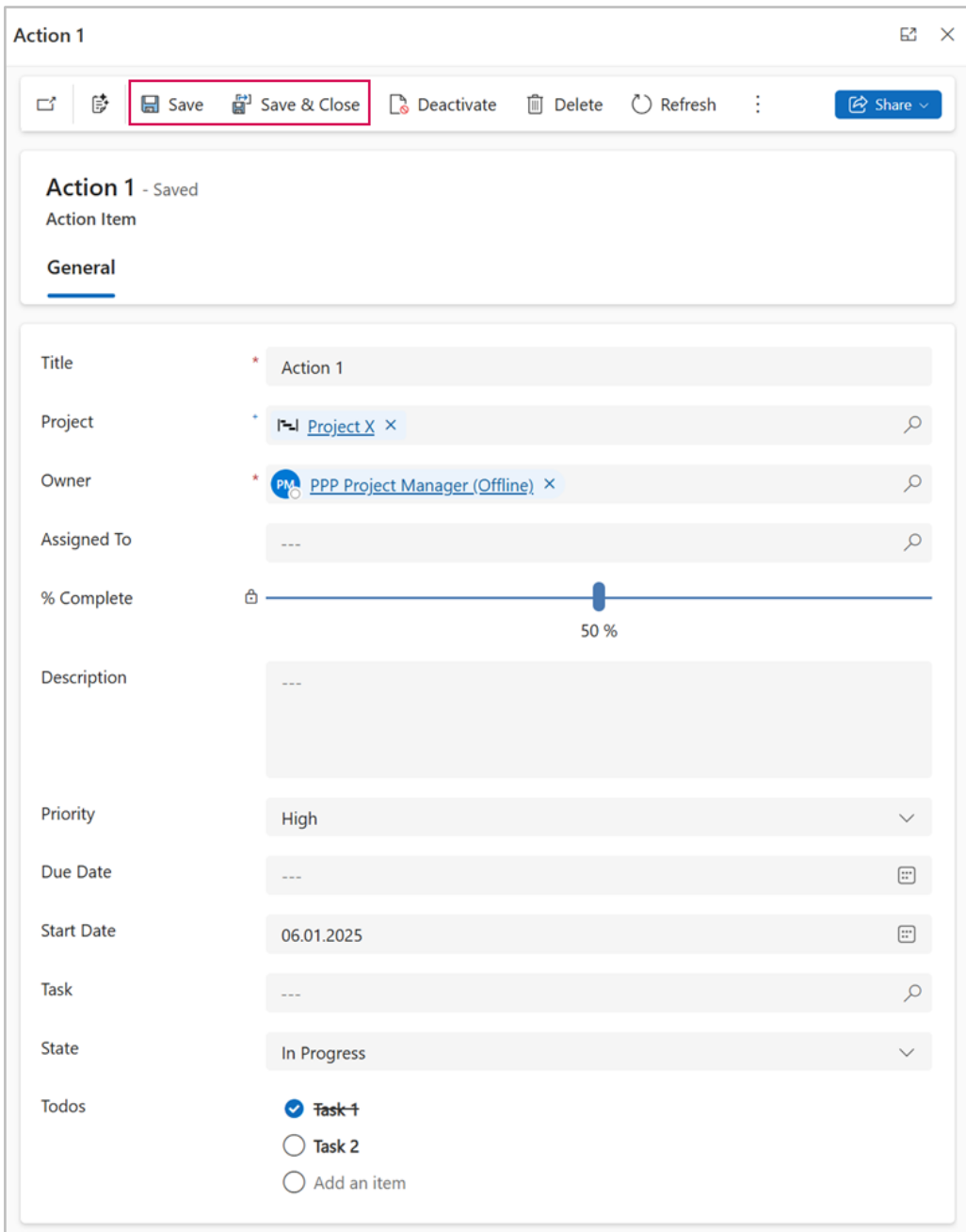
- **Todos:** Tasks within the action.

- Click on *Add an item.* (1) ▶ A text field appears.
- Enter the name of the task and confirm with the Enter key.
- Click on the delete icon (2) to delete a task.

- Click in the circle (3) to mark the task as completed.
- Click on the 6 dots (4) to change the order of the tasks using drag & drop.



- Click on *Save* or *Save and Close* to complete the editing of the action.

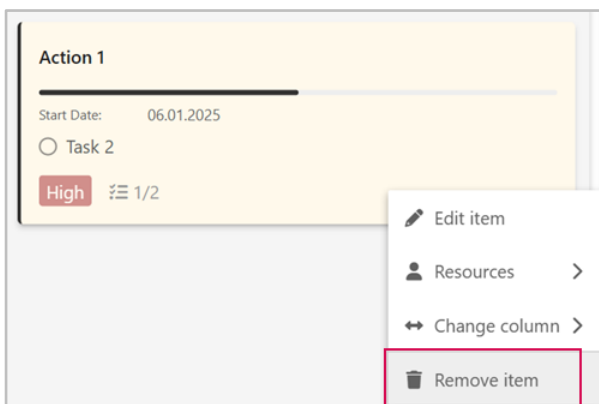


13.1.3 Delete or move Actions

In the Kanban board on the *Action* tab, you can delete actions and move actions to another column to assign them a different state. (see [Actions - current Project](#) ¹⁵⁰)

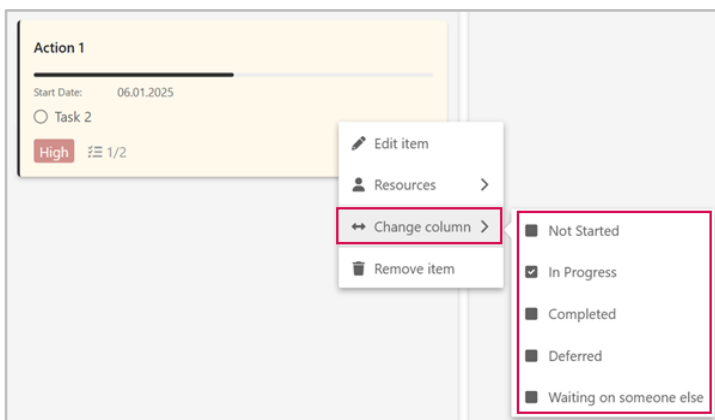
Delete action:

- Select the action you want to delete.
- Right-click on the action. ▶ A drop-down menu opens.
- Click on *Remove item*.



Move actions:

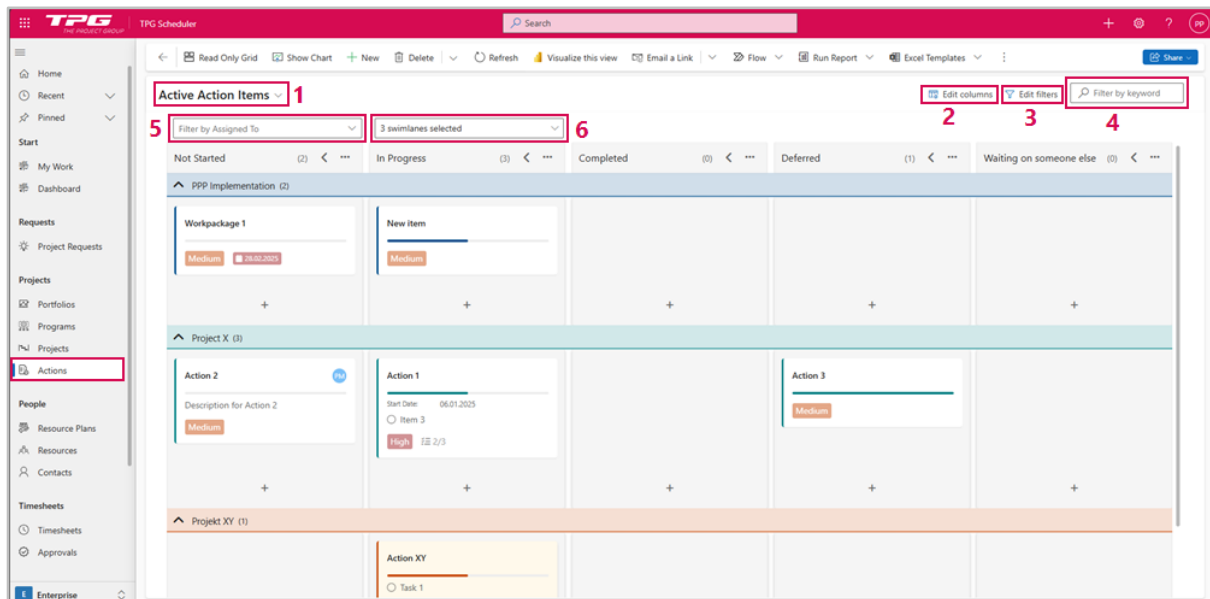
- Select the action you want to move.
- Right-click on the action. ▶ A drop-down menu opens.
- Go to *Change Column*.
- Click on the desired state.



13.2 Actions - organize across projects

In this section, you will learn how to display and manage actions from multiple projects. This function allows you to obtain a comprehensive overview of all assigned actions and their states. Another Kanban board is integrated in PPP for this purpose, which displays actions across projects.

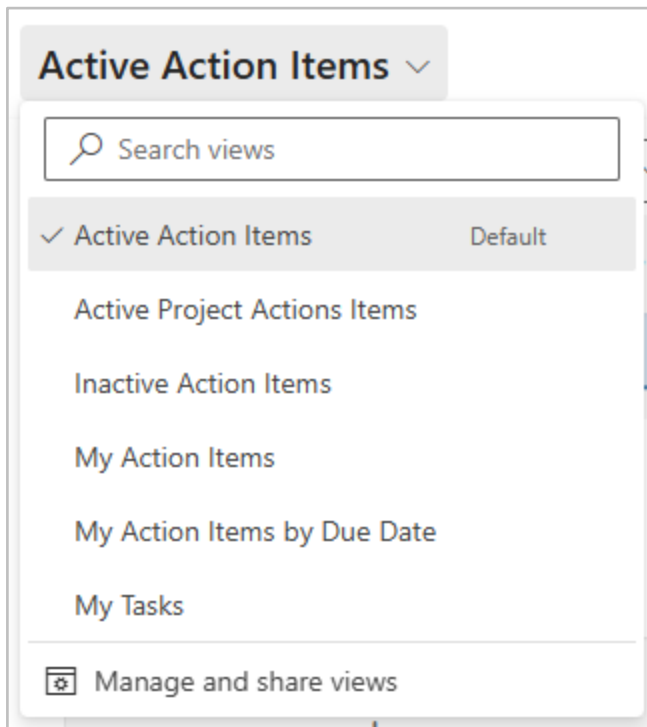
- Click on *Actions* in the navigation bar. ➤ By default, all active action items are displayed on the Kanban board.



There are options available to you to customize the view:

- Selection menu of displayed Actions (1):
 - Click on the down arrow. ➤ A drop-down menu opens.

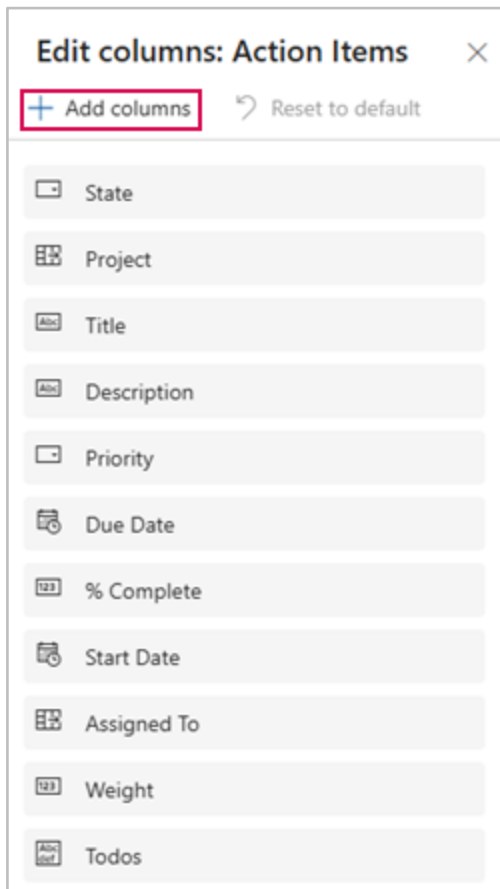
➤ Click on the desired display option.



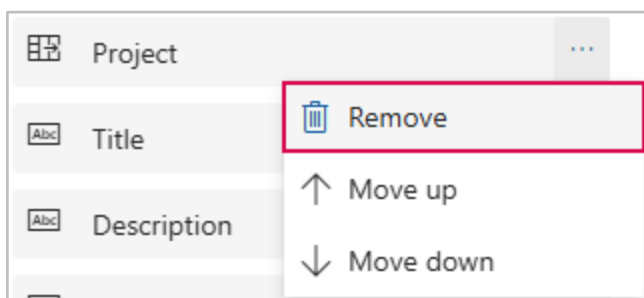
▪ *Edit columns* (2): Add columns and change the order of the columns using drag & drop.

➤ Click on *Edit columns*. (2) ► A form opens.

- Click on *Add columns* and select the columns you want to add.

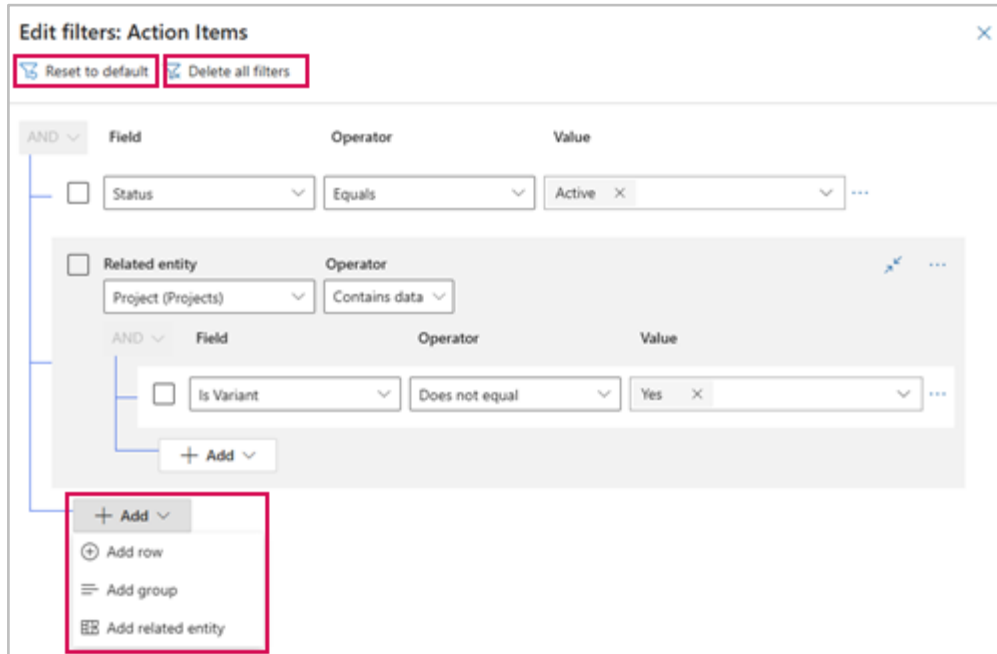


- Click on the column you want to move and drag the column to the desired position while holding down the mouse button.
- Click on the 3 dots in the column and select *Remove* from the drop-down menu to delete a column.

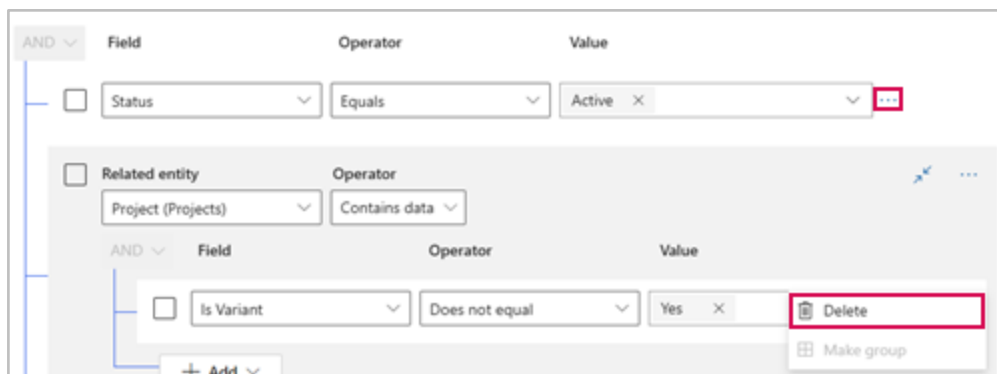


- Click *Reset to default* to restore the default settings.
- Click on *Apply* to apply the changes to the view.
- *Edit filters (3)*: Filter options for displayed action items.

- Click on *Add*. ▶ A drop-down menu opens.
- In the drop-down menu, select whether you want to add a row, a group or a related entity.

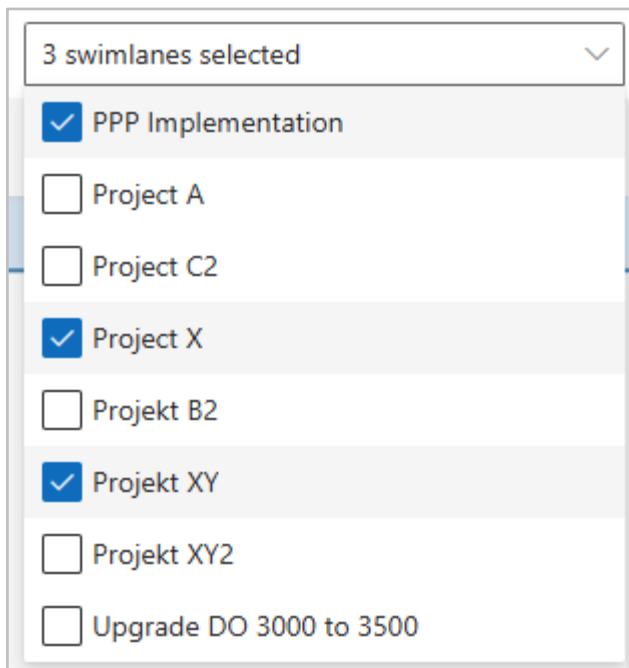


- Set the attributes according to which the action items are to be filtered.
- Click on the three dots next to the filter and click on *Delete* to delete a filter.



- Click on *Delete all filters* to delete all filters.
- Click *Reset to default* to restore the default settings.
- Click on *Apply*. ▶ Only the action items to which the desired filters apply are displayed.
- *Filter by keyword (4)*:
 - Click on the *Filter by keyword* field.

- Enter the keyword you want to filter by.
- Click on the cross in the *Filter by keyword* field to delete the filter.
- ▶ The action items in which the keyword occurs are displayed.
- **Filter by Assigned To (5):** Filter action items across projects according to the users to whom they are assigned.
 - Click on the *Filter by Assigned To* field. ▶ A drop-down menu opens.
 - Select the user whose assigned action items you want to display in the overview.
- **Swimlanes selected (6):** Display action items of a project in rows (swimlanes) below each other on the Kanban board. (see [Actions - show across projects](#)¹⁶⁴)
 - Click on the *swimlanes selected* field. ▶ A drop-down menu opens.
 - Select the projects that you want to display on the Kanban board.

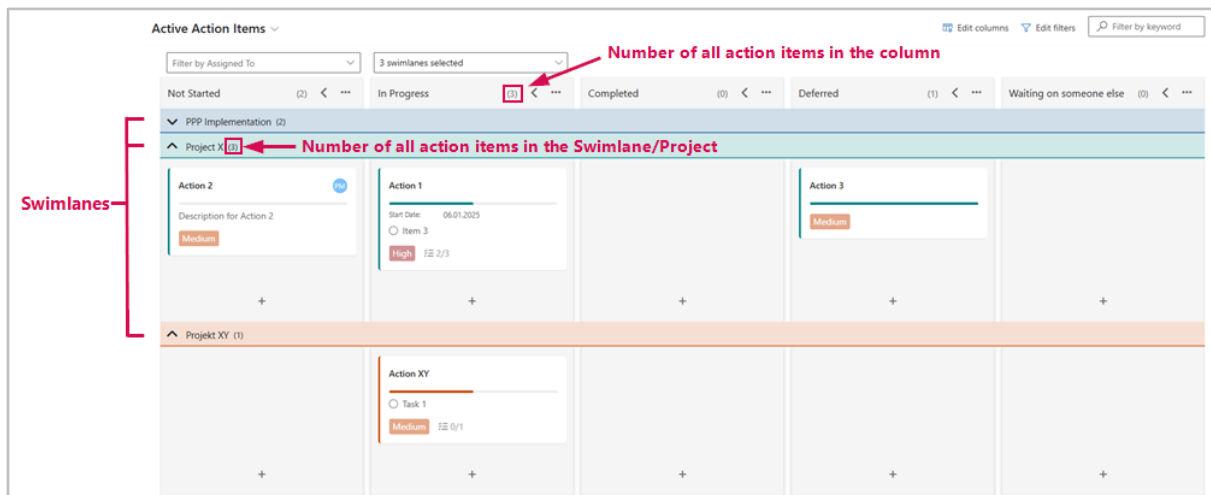


13.2.1 Actions - show across projects

The action items from multiple projects are displayed in swimlanes on the Kanban board, giving you a clear and structured overview of all actions and their states.

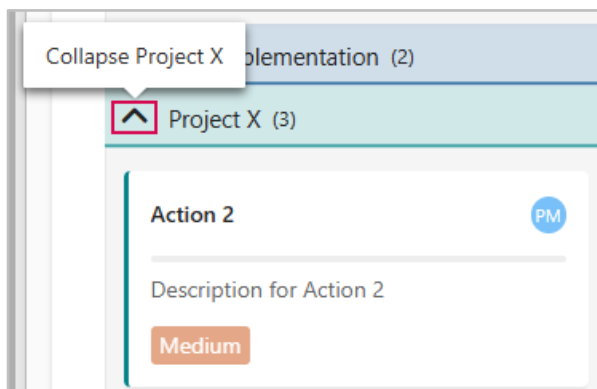
Swimlane = line in which all action items of a project are displayed.

This display makes it easier to manage and prioritize actions across different projects:



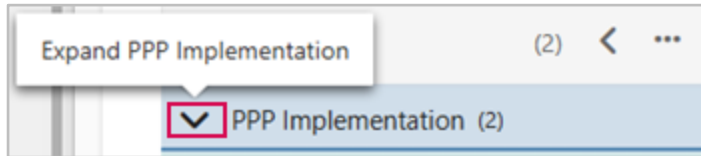
For a better clarity, you can expand and collapse the action items of a swimlane:

- Click on the arrow pointing up on the left of the project name. ➤ The action items are collapsed.



Or

- Click on the arrow pointing down on the left of the project name. ▶ The action items are expanded.



-
- ▶ You can also expand and collapse the columns. (see [Action - current Project](#)¹⁵⁰)
-

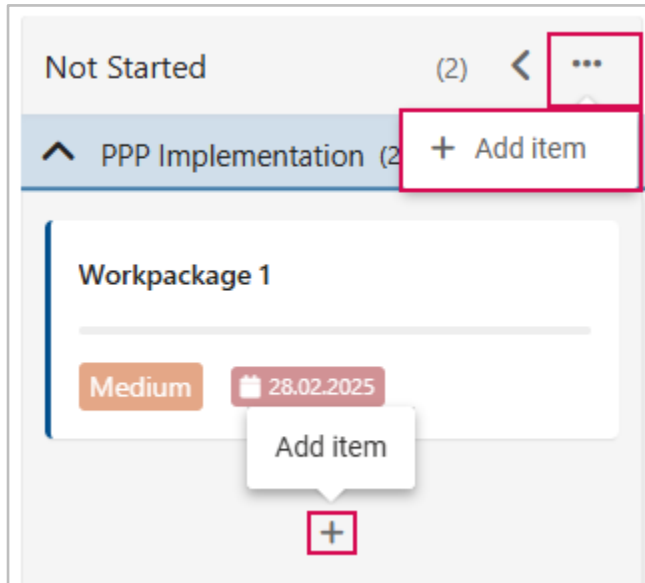
13.2.2 Actions - create and edit across projects

Creating actions in the cross-project Kanban board:

There are two ways to create an action in the cross-project Kanban board:

- Go to the state column to which you want to add an action.
- Click on the three dots on the right-hand side of the state column. ▶ A drop-down menu opens.
- Click on *Add item*.

-
- ▶ The action is inserted into the first swimlane. You can move the action to another swimlane via drag & drop, thereby assigning it to a different project. (see [Actions - delete and move across projects](#)¹⁶⁶)
-



Or

- Select the project to which you want to add an action and go to the project's swimlane.
- Click on the plus symbol in the state column.
- ▶ A new action is created and appears in the state column and swimlane of the desired project.

Edit actions in the cross-project Kanban board:

You can edit the actions in the cross-project view. To do so, proceed as described in [Edit Actions](#)¹⁵⁴.

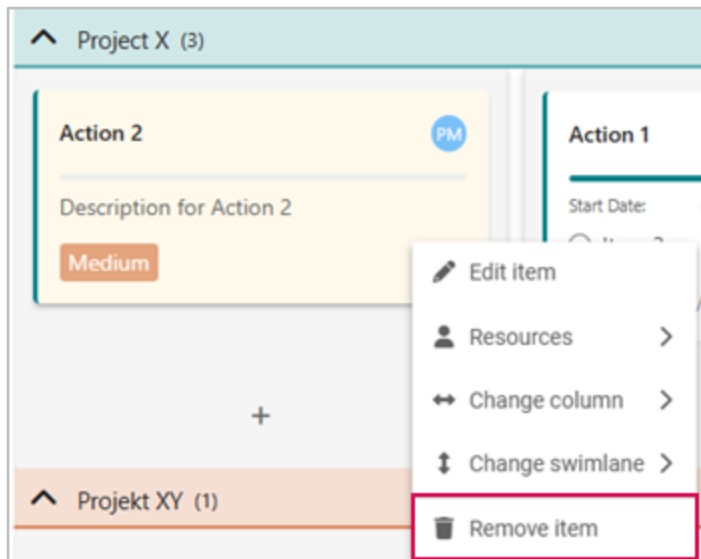
13.2.3 Actions - delete and move across projects

In the Kanban board for cross-project actions, you can assign actions to a different state or project and delete actions.

Delete action:

- Select the action you want to delete.
- Right-click on the action. ▶ A drop-down menu opens.

- Click on *Remove item*.



Move actions:

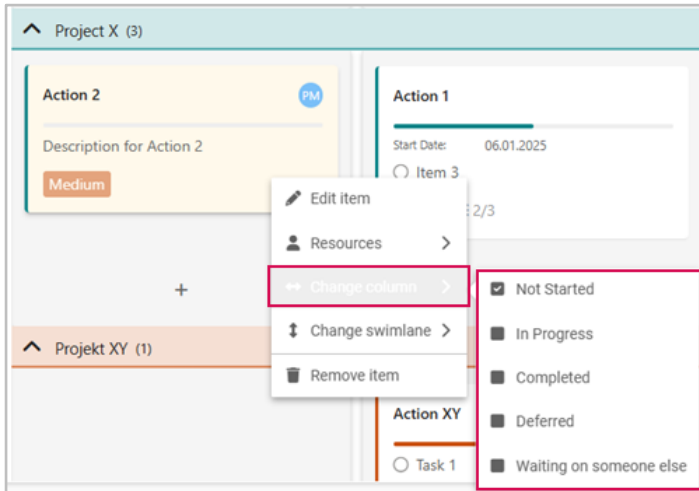
There are several options for moving actions. The actions can be moved within a column and a swimlane or to other columns and swimlanes.

- Select the actions you want to move.
- Move the action to the desired column and swimlane using drag & drop.

Or

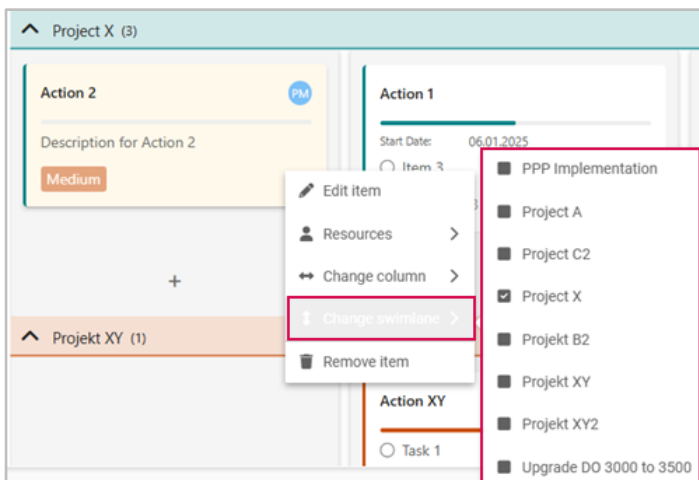
- Right-click on the action. ► A drop-down menu opens.
- Go to *Change column*.

- Click on the desired column.



Or





- Right-click on the action. A drop-down menu opens.
- Go to *Change swimlane*.
- Click on the desired swimlane.



14 Decisions

On the *Decisions* tab, you can document decisions made during the course of a project. This feature supports traceability and transparency throughout the project by consolidating all relevant information about decisions in one place.

In this section, you will learn how to:

- [Add Decisions](#)  169
- [Edit Decisions](#)  173
- [Deactivate and Activate Decisions](#)  174
- [Use additional Commands for Decisions](#)  176

14.1 Add Decisions

To add a *Decision*, proceed as follows:

- Click on *New Decision*. ➤ The *Quick Create: Decision* form for creating a Decision opens.

Active Decisions ▼					
+ New Decision 🔄 Refresh					
<input type="checkbox"/>	Decision 1 ▼	Category ▼	Priority ▼	State ▼	Target Date ▼
<input type="checkbox"/>	Decision 1		Moderate	Active	

Quick Create: Decision ✕

General

Decision * ---

Project * | Project X × 🔍

Impact ---

Details

Priority --- ▾

Source --- ▾

State --- ▾

Owner * | PM | PPP Project Manager (Offline) × 🔍

Approval

Approved Date --- 📅

Executive Reporting No

Category --- ▾

Target Date --- 📅

Resulting Actions ---

Save and Close ▾ Cancel

- Fill out the form:

▶ To add a Decision, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- **General:**

- **Decision:** Enter a meaningful name for the Decision.

- **Project:** The current project is selected by default.

- **Impact, Details:**

- Enter a meaningful description of the impact and details of the Decision.

- **Priority:**

- Click in the field and select the priority from the drop-down menu.

A screenshot of a web form with several fields: Priority, Source, State, and Owner. The Priority field is selected, and a drop-down menu is open, showing the following options: --Select-- (selected), --Select--, Critical, High, Moderate, and Low. The Owner field has a red asterisk next to it.

- **Source:**

- Click in the field and select the source from the drop-down menu.

A screenshot of a web form with several fields: Source, State, Owner, and Approval. The Source field is selected, and a drop-down menu is open, showing the following options: --Select-- (selected), --Select--, Meeting, Conversation, and Self. The Owner field has a red asterisk next to it.

- **State:**

- Click in the field and select the status from the drop-down menu.

A screenshot of a web form with several fields: State, Owner, Approval, Approved Date, Executive Reporting, and Category. The State field is selected, and a drop-down menu is open, showing the following options: --Select-- (selected), --Select--, Not Started, Active, On Hold, Deferred, Completed, and Rejected. The Owner field has a red asterisk next to it.

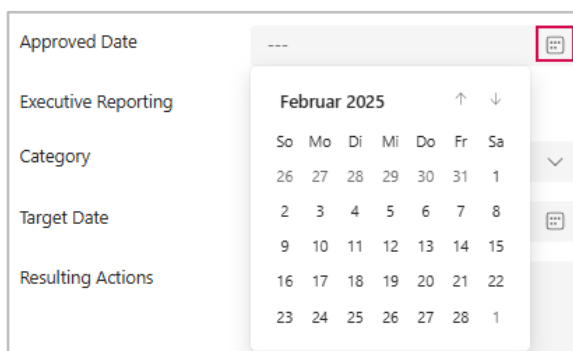
- **Owner:** Creator of the Decision. By default, the current user is entered.

▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

▪ **Approval:**

▪ **Approved Date:**

➤ Click on the calendar icon and enter the approved date.

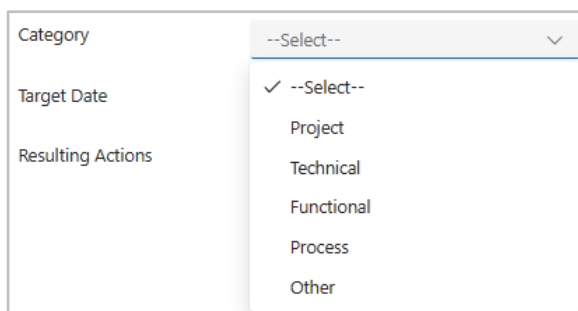


▪ **Executive Reporting:** Create a report for management. *No* is selected by default..

➤ Click on the slider to select *Yes*.

▪ **Category:**

➤ Click in the field and select the category from the drop-down menu.



▪ **Target Date:**

➤ Click on the calendar icon and enter the target date.

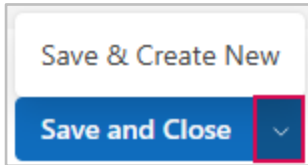
▪ **Resulting Actions:**

➤ Enter a meaningful description of the resulting action.

➤ Click *Save and Close*.

Or

➤ Click the down arrow and *Save & Create New* to add another Decision.



▶ A Decision has been added.

▶ The Decision appears in the *Active Decisions* table.

14.2 Edit Decisions

A Decision can be edited as follows:

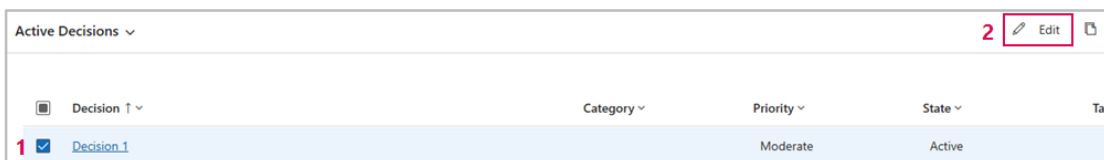
➤ Click on the preview in the *Decision* column. ▶ The form for editing the Decision opens.



Or

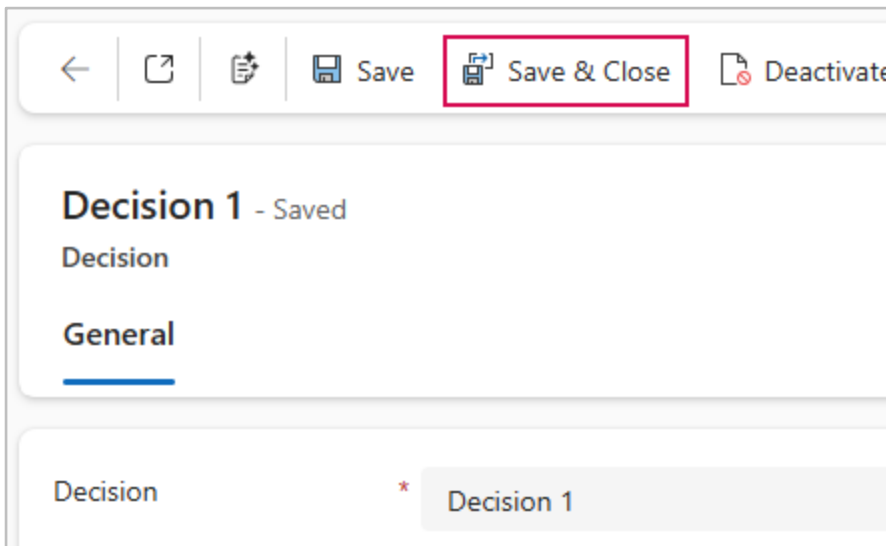
➤ Click on the row of the desired Decision to select it. (1)

➤ Click on *Edit*. (2)



➤ Enter the desired changes in the form.

- Click *Save & Close* to save the Decision and finish editing.

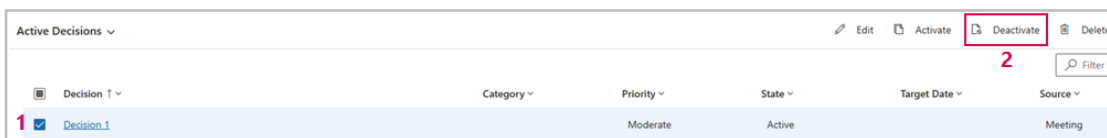


- ▶ Only Decisions with the status Active can be edited. Deactivated Decisions are locked for editing.

14.3 Deactivate and Activate Decisions

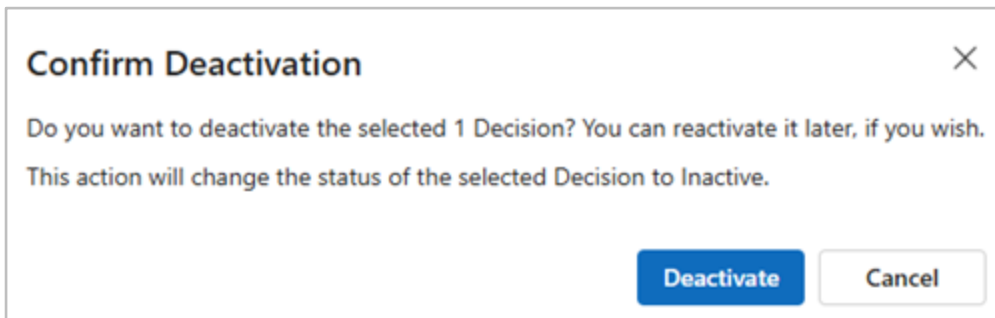
Decisions are active by default. You can deactivate Decisions:

- Select the Decision you want to deactivate.
- Click on the Decision row to highlight it. (1)
- Click on *Deactivate*. (2)



- ▶ The *Confirm Deactivation* field opens.

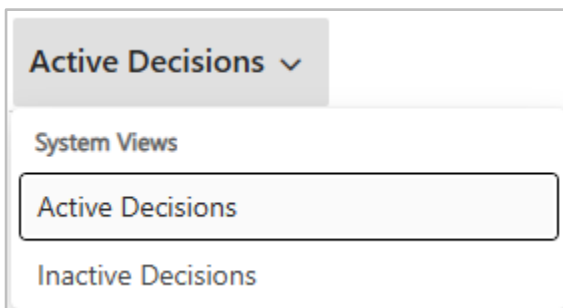
- Click *Deactivate* to deactivate the Decision.



By default, all active and inactive Decisions are listed in the table.

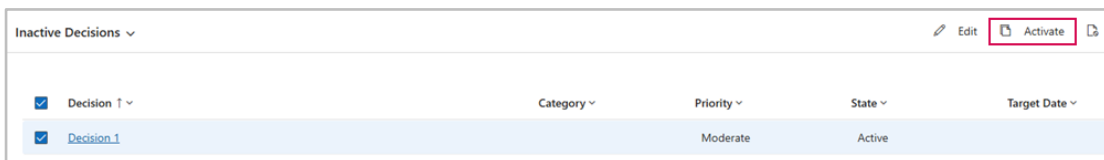
Display only inactive Decisions:

- Go to *Active Decisions*.
- Click the down arrow.
- Click on *Inactive Decisions*.



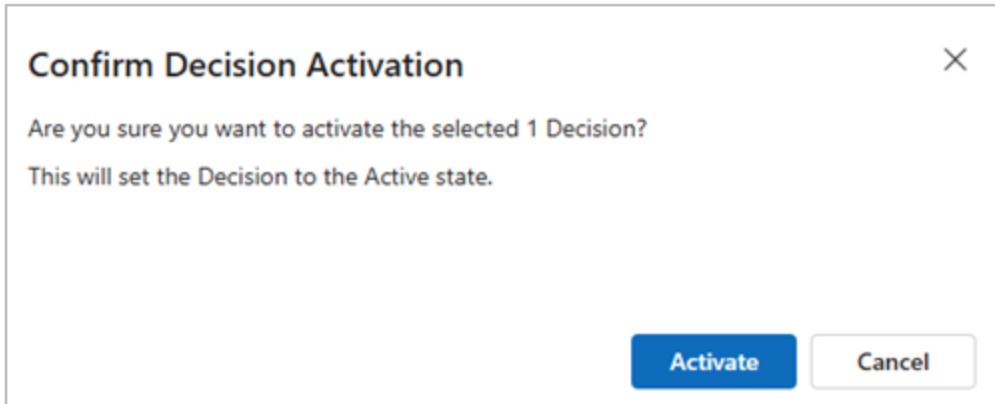
Activate Decisions:

- Select the Decision as described above.
- Click on *Activate*.



- ▶ The *Confirm Decision Activation* field opens.

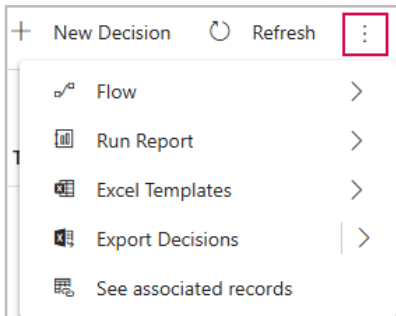
- Click on *Activate* to activate the Decision.



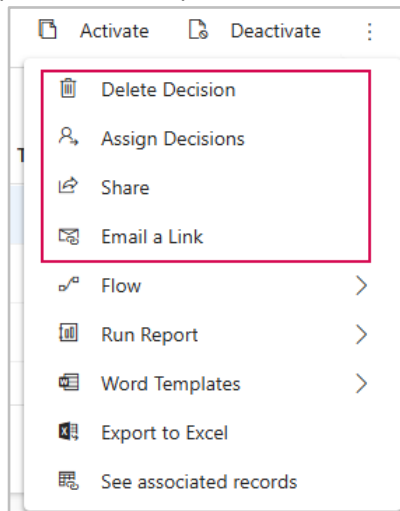
14.4 Additional Commands for Decisions

Above the *Active Decisions* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected a Decision, additional commands related to the selected Decision will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Decision*: Permanently deletes the selected Decision.





⚠ This action cannot be undone.

-
- *Assign Decisions*: Changes the owner of the selected Decision.
 - *Share*: Shares the Decision with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Decision via email.
 - *Flow*: Runs a flow for the Decision.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

15 Stakeholders

On the *Stakeholders* tab, you can enter information about project participants. This allows you to keep track of the roles, influences, and involvement of your stakeholders.

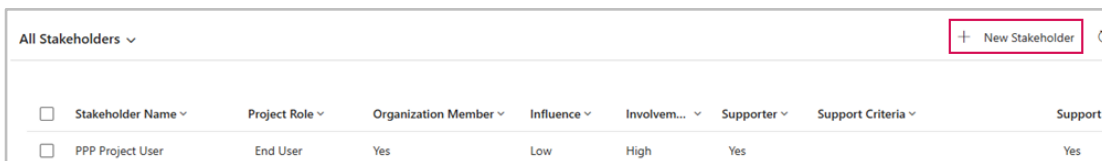
In this section, you will learn how to:

- [Add Stakeholders](#)  178
- [Edit Stakeholders](#)  182
- [Deactivate and Activate Stakeholders](#)  183
- [Use additional Commands for Stakeholders](#)  184

15.1 Add Stakeholders

To add a *Stakeholder*, proceed as follows:

- Click on *New Stakeholder*. ► The *Quick Create: Stakeholder* form for creating a Stakeholder opens.



All Stakeholders								+ New Stakeholder
<input type="checkbox"/>	Stakeholder Name	Project Role	Organization Member	Influence	Involvement	Supporter	Support Criteria	Support C
<input type="checkbox"/>	PPP Project User	End User	Yes	Low	High	Yes		Yes

Quick Create: Stakeholder ✕

General

Organization Member Yes

Stakeholder User * 🔍

Project * 🔍

Project Role ▼

Influence Low

Involvement Low

Supporter ▼

Support Criteria Met ▼

Support Criteria

- Fill out the form:

▶ To add a Stakeholder, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- **General:**

- **Organization Member:** Stakeholder is a member of the organization. *Yes* is selected by default.

- Click on the slider to select *No*.

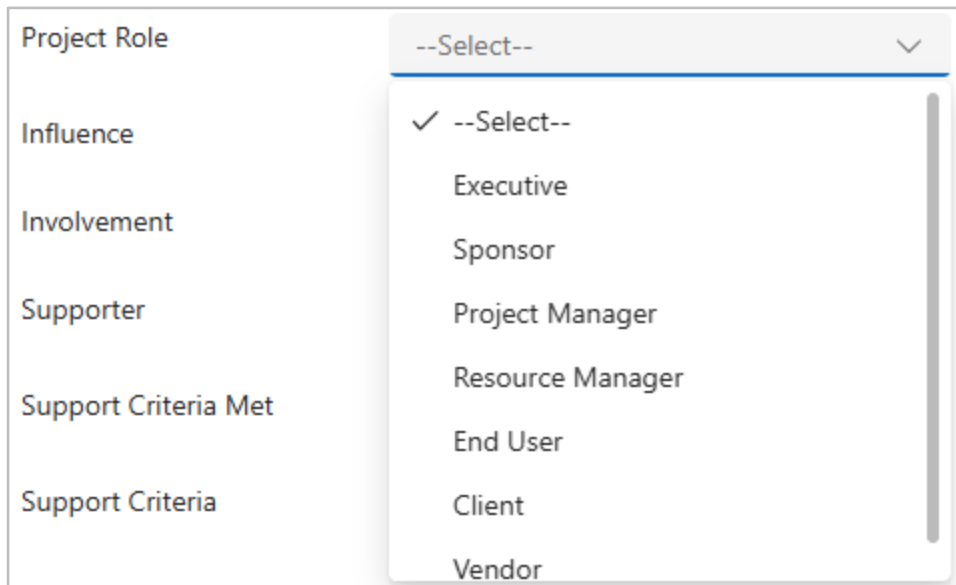
- **Stakeholder User:**

- Click on the input field, then press the Enter key and enter the desired Stakeholder User.

- **Project:** The current project is selected by default.

- **Project Role:**

- Click in the field and select the role from the drop-down menu.



- **Influence:** Influence of the Stakeholder on the project. *Low* is selected by default..

- Click on the slider to select *High*.

- **Involvement:** Involvement of the Stakeholder in the project. *Low* is selected by default.

- Click on the slider to select *High*.

- **Supporter:** Support of the Stakeholder in the project.

- Click in the field and select the supporter from the drop-down menu.

A screenshot of a form with three fields: 'Supporter', 'Support Criteria Met', and 'Support Criteria'. The 'Supporter' field has a dropdown menu open, showing a list of options: '--Select--' (selected), '--Select--', 'No', 'Yes', and 'Indifferent'.

- *Support Criteria Met:*

- Click in the field and select an option from the drop-down menu..

A screenshot of a form with two fields: 'Support Criteria Met' and 'Support Criteria'. The 'Support Criteria Met' field has a dropdown menu open, showing a list of options: '--Select--' (selected), 'No', 'Yes', and 'Partial'.

- *Support Criteria:*

- Enter a meaningful description of the support criteria.

- Click *Save and Close*.

Or

- Click the down arrow and *Save & Create New* to add another Stakeholder.

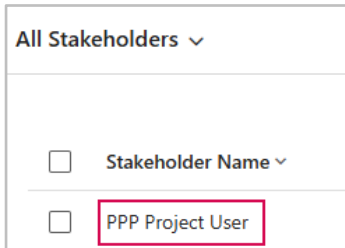
A screenshot of a button labeled 'Save and Close' with a small downward-pointing arrow to its right, indicating a dropdown menu.

- ▶ A Stakeholder is added.
- ▶ The stakeholder appears in the *All Stakeholders* table.

15.2 Edit Stakeholders

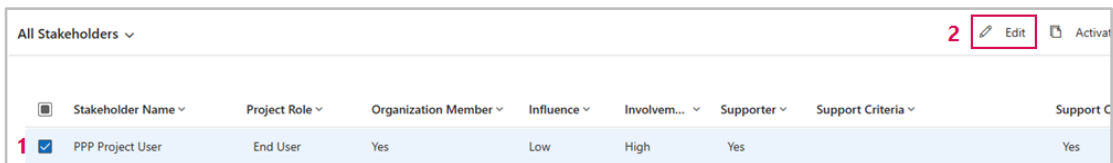
A Stakeholder can be edited as follows:

- Click on the preview in the *Stakeholder Name* column. ➤ The form for editing the Stakeholder opens.

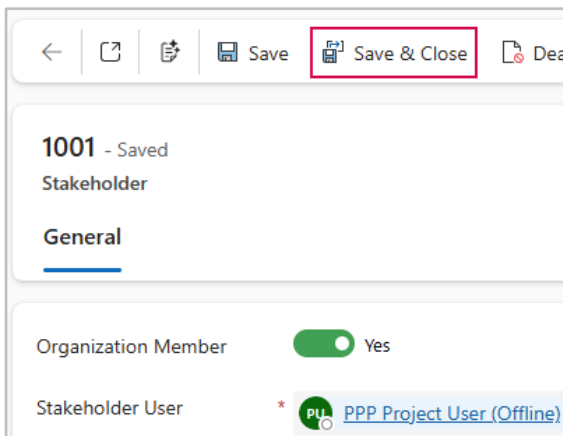


Or

- Click on the row of the desired Stakeholder to select it. (1)
- Click on *Edit*. (2)



- Enter the desired changes in the form.
- Click *Save & Close* to save the Stakeholder and finish editing.



-
- ▶ Only Stakeholder with the status Active can be edited. Deactivated Stakeholders are locked for editing.
-

15.3 Deactivate and Activate Stakeholders

Stakeholders are active by default. You can deactivate Stakeholders:

- Select the Stakeholder you want to deactivate.
- Click on the Stakeholder row to highlight it. (1)
- Click on *Deactivate*. (2)

The screenshot shows a table titled 'All Stakeholders' with columns: Stakeholder Name, Project Role, Organization Member, Influence, Involvement, Supporter, Support Criteria, Support Criteria Met, and Manage. The first row is selected and highlighted in blue, with a red '1' next to the checkbox. The 'Deactivate' button in the top right corner is highlighted with a red box and a red '2' next to it.

Stakeholder Name	Project Role	Organization Member	Influence	Involvement	Supporter	Support Criteria	Support Criteria Met	Manage
PPP Project User	End User	Yes	Low	High	Yes	Yes	Yes	Keep Sa

▶ The *Confirm Deactivation* field opens.

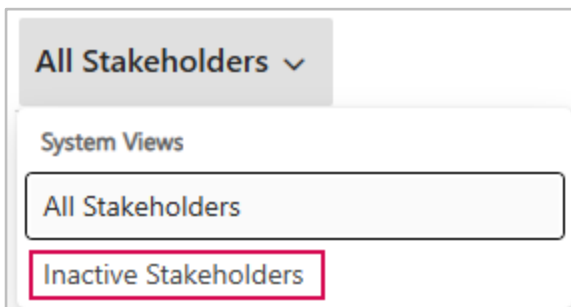
- Click *Deactivate* to deactivate the Stakeholder.

The dialog box is titled 'Confirm Deactivation' and contains the following text: 'Do you want to deactivate the selected 1 Stakeholder? You can reactivate it later, if you wish. This action will change the status of the selected Stakeholder to Inactive.' At the bottom, there are two buttons: 'Deactivate' (blue) and 'Cancel' (white).

By default, all active and inactive Stakeholders are listed in the table.

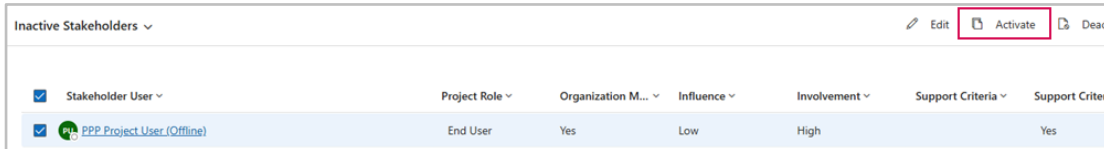
Display only inactive Stakeholders:

- Go to *All Stakeholders*.
- Click the down arrow.
- Click on *Inactive Stakeholders*.

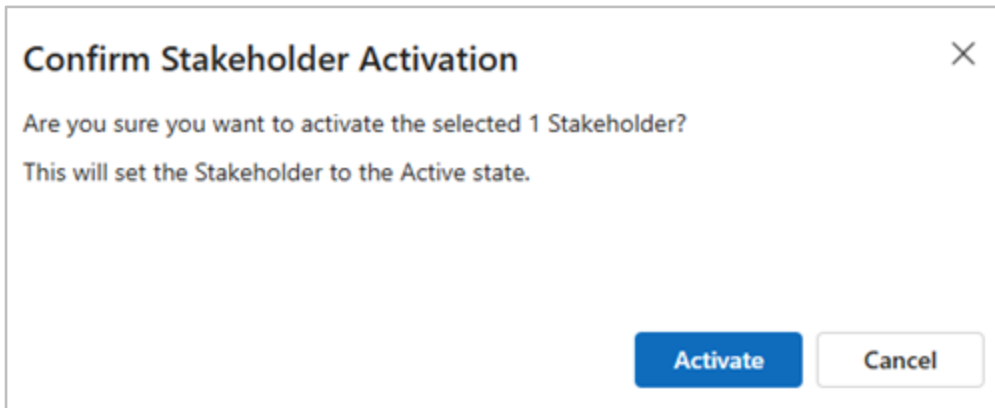


Activate Stakeholders:

- Select the Stakeholder as described above.
- Click on *Activate*.



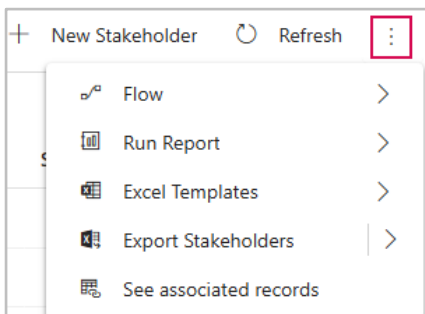
- ▶ The *Confirm Stakeholder Activation* field opens.
- Click on *Activate* to activate the Stakeholder.



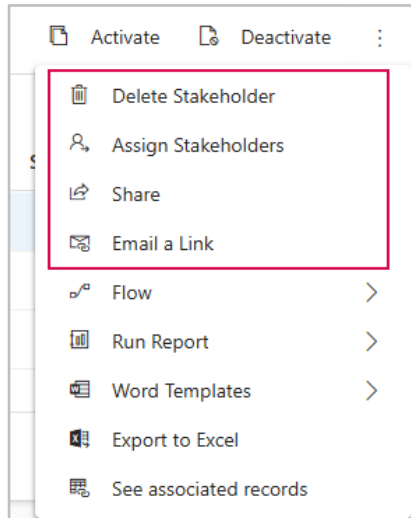
15.4 Additional Commands for Stakeholders

Above the *All Stakeholders* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected a Stakeholder, additional commands related to the selected Stakeholder will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Stakeholder*: Permanently deletes the selected Stakeholder.





⚠ This action cannot be undone.

-
- *Assign Stakeholders*: Changes the owner of the selected Stakeholder.
 - *Share*: Shares the Stakeholder with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Stakeholder via email.
 - *Flow*: Runs a flow for the Stakeholder.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

16 Objectives

On the *Objectives* tab, you can enter structured project-related Objectives.

This section describes how to:

- [Add Objectives](#)  186
- [Edit Objectives](#)  190
- [Deactivate and Activate Objectives](#)  191
- [Use additional Commands for Objectives](#)  192

16.1 Add Objectives

To add an Objective, proceed as follows:

- Click on *New Objective*. ► The *Quick Create: Objective* form for creating an Objective opens.



Active Objectives ▼					
<input type="checkbox"/>	Objective Title ↑ ▼	Objective Description ▼	Priority ▼	Created On ▼	Assigned To ▼
<input type="checkbox"/>	Objective 1		Moderate	24.07.2025 14:44	 PPP Project Man...

Quick Create: Objective ✕

General

Objective Title *

Project * ✕

Owner * ✕

Objective Description

Priority

Assigned To

Objective Status

Objective Type

- Fill out the form:

▶ To add an Objective, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- **General:**

- **Objective Title:** Enter a meaningful name for the Objective.
- **Project:** The current project is selected by default.
- **Owner:** Creator of the Objective. The current user is entered by default.

▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

- **Objective Description:**

- Enter meaningful descriptions in the field.

- **Priority:**

- Click in the field and select the priority from the drop-down menu..

A screenshot of a web form with a dropdown menu open. The dropdown is positioned over the 'Priority' field. The menu items are: --Select-- (selected), Critical, High, Moderate, and Low. Other fields visible in the background include 'Assigned To', 'Objective Status', and 'Objective Type'.

- **Assigned To:** Stakeholder to whom the Objective is assigned.

- Click on the input field, then press the Enter key and enter the desired stakeholder.

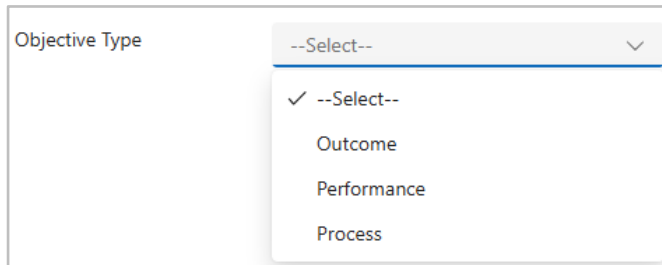
- **Objective Status:**

- Click in the field and select the status from the drop-down menu.

A screenshot of a web form with a dropdown menu open. The dropdown is positioned over the 'Objective Status' field. The menu items are: --Select-- (selected), Not Started, In Progress, Completed, and Deferred. Other fields visible in the background include 'Objective Type'.

▪ **Objective Type:**

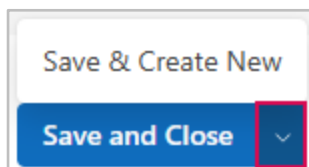
- Click in the field and select the type from the drop-down menu.



- Click *Save and Close*.

Or

- Click the down arrow and *Save & Create New* to add another Objective.

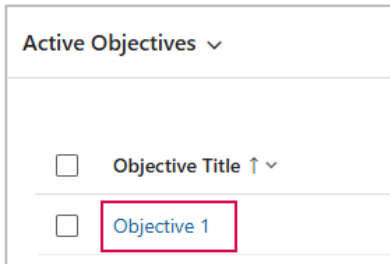


- ▶ A Objective is added.
- ▶ The Objective appears in the *Active Objectives* table.

16.2 Edit Objectives

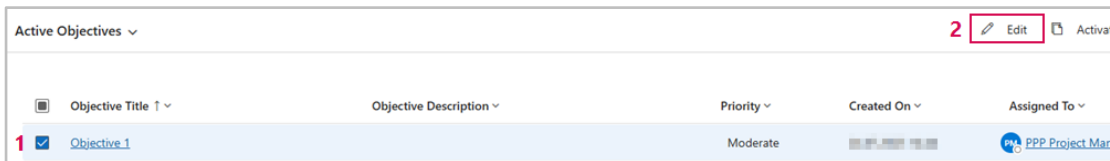
An Objective can be edited as follows:

- Click on the preview in the *Objective Title* column. ➤ The form for editing the Objective opens.

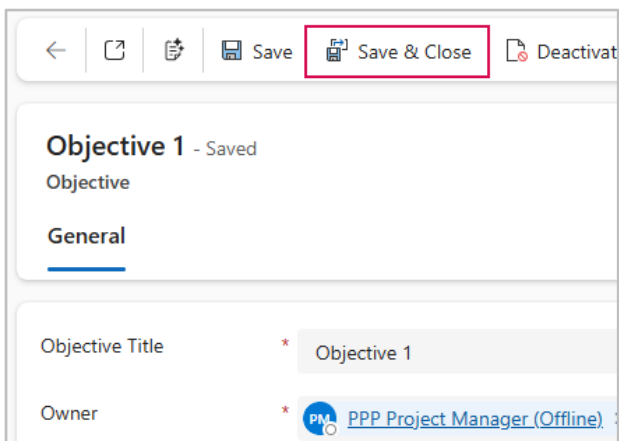


Or

- Click on the row of the desired Objective to select it. (1)
- Click on *Edit*. (2)



- Enter the desired changes in the form.
- Click *Save & Close* to save the Objective and finish editing.



-
- Only Objectives with the status Active can be edited. Deactivated Objectives are locked for editing.
-

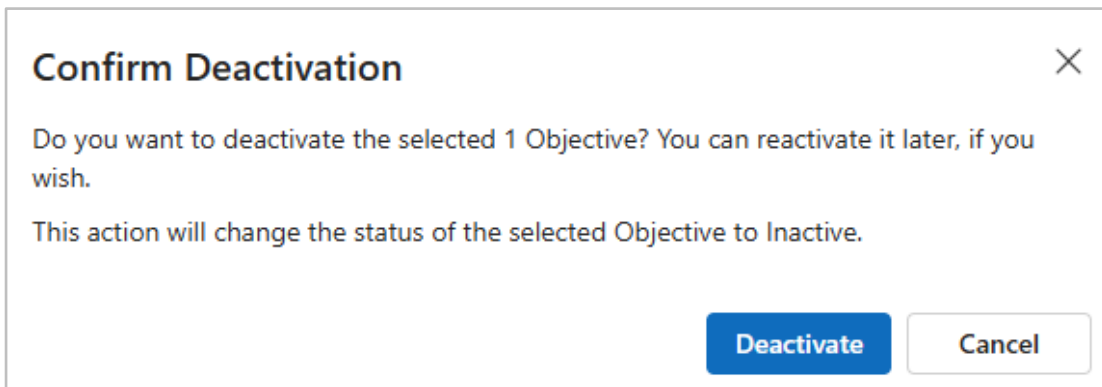
16.3 Deactivate and Activate Objectives

Objectives are active by default. You can deactivate Objectives:

- Select the Objective you want to deactivate.
- Click on the Objective row to highlight it. (1)
- Click on *Deactivate*. (2)



- ▶ The *Confirm Deactivation* field opens.
- Click *Deactivate* to deactivate the Objective.



By default, all active and inactive Objectives are listed in the table.

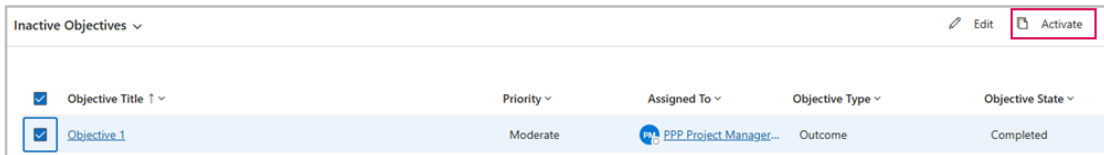
Display only inactive Objectives:

- Go to *Active Objectives*.
- Click the down arrow.
- Click on *Inactive Objectives*.

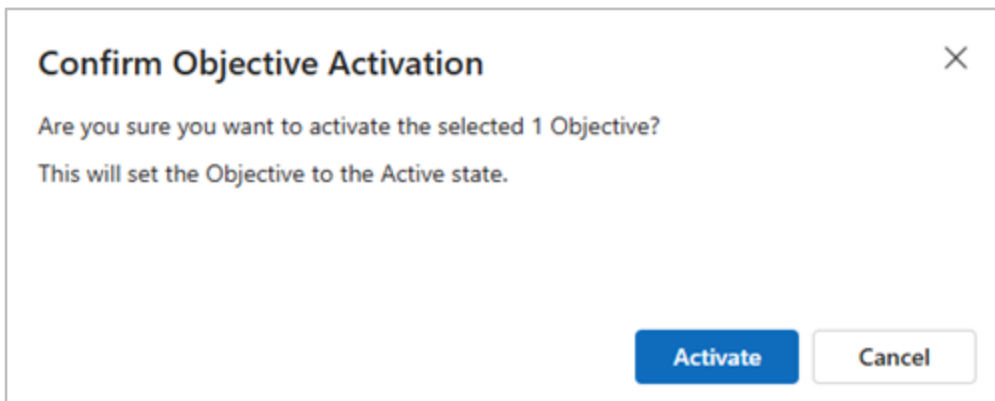


Activate Objectives:

- Select the Objective as described above.
- Click on *Activate*.



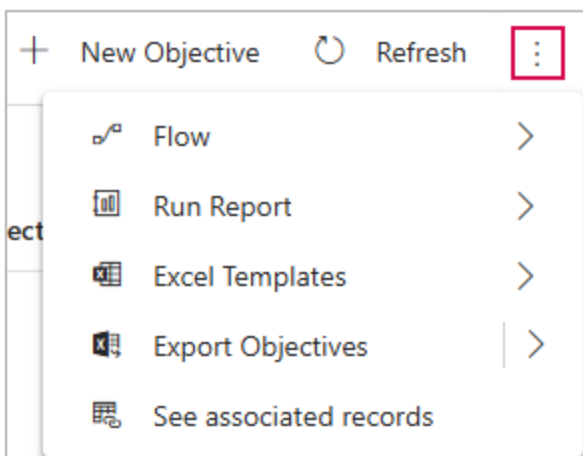
- ▶ The *Confirm Objective Activation* field opens.
- Click on *Activate* to activate the Objective.



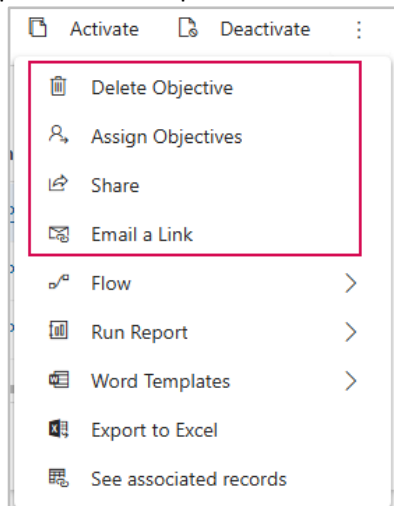
16.4 Additional Commands for Objectives

Above the *Active Objectives* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected an Objective, additional commands related to the selected Objective will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Objective*: Permanently deletes the selected Objective.

⚠ This action cannot be undone.

-
- *Assign Objectives*: Changes the owner of the selected Objective.
 - *Share*: Shares the Objective with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Objective via email.
 - *Flow*: Runs a flow for the Objective.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

17 Benefits

The *Benefits* tab is used for the systematic recording and ongoing tracking of the added value targeted in the project.


This section describes how to:

- [Add Benefits](#)  194
- [Edit Benefits](#)  199
- [Deactivate and Activate Benefits](#)  200
- [Use additional Commands for Benefits](#)  201

17.1 Add Benefits

To add a Benefit, proceed as follows:

- Click on *New Benefit*. ► The *Quick Create: Benefit* form for creating a Benefit opens.

Active Benefits ▾									+ New Benefit
<input type="checkbox"/>	Title ↑ ▾	Benefit Amount ▾	Benefit A... ▾	Benefit O... ▾	Benefit Ty... ▾	Benefit C... ▾	Measure... ▾	Measure... ▾	Benefit St...
<input type="checkbox"/>	Benefit 1	2.000,00 €	1.200,00 €	 PPP Projec...	Financial	Efficiency...	wöchentlich		Docume...

Quick Create: Benefit

General

Title * ---

Project * | Project X ×

Owner * | PPP Project Manager (Offline) ×

Benefit Owner ---

Description ---

Benefit Type ---

Measurement Frequency ---

Measurement Process ---

Benefit State ---

Benefit Category ---

Benefit Amount ---

Benefit Target ---

Benefit Target Date ---

Baseline Data Date ---

Benefit Amount Realized ---

[Save and Close](#) [Cancel](#)

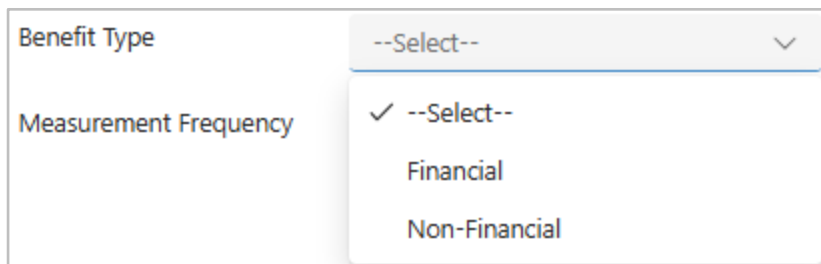
- Fill out the form:

▶ To add a Benefit, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- **General:**
 - **Title:** Enter a meaningful name for the Benefit.
 - **Project:** The current project is selected by default.
 - **Owner:** Creator of the Benefit. The current user is entered by default.

▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

- **Benefit Owner:**
 - Click on the input field, then press the Enter key and enter the responsible person.
- **Description:**
 - Enter a meaningful description of the Benefit.
- **Benefit Type:**
 - Click in the field and select the Benefit Type from the drop-down menu.



The image shows a screenshot of a web form. On the left, there is a label 'Benefit Type' and a text input field containing 'Measurement Frequency'. To the right of the input field is a dropdown menu. The dropdown menu is open, showing a list of options: '--Select--' (with a checkmark), 'Financial', and 'Non-Financial'. The dropdown menu has a small downward arrow icon on its right side.

- **Measurement Frequency:**
 - Enter the measurement frequency.
- **Measurement Process:**
 - Enter the measurement process.

- **Benefit State:**

- Click in the field and select the status from the drop-down menu.

A screenshot of a software interface showing a form with several fields: 'Benefit State', 'Benefit Category', 'Benefit Amount', 'Benefit Target', and 'Benefit Target Date'. The 'Benefit State' field is selected, and a dropdown menu is open, displaying the following options: '--Select--', 'Documented', 'On Track', 'Partial', 'Realized', and 'Not Realized'. The first option '--Select--' is currently selected.

- **Benefit Category:**

- Click in the field and select the category from the drop-down menu.

A screenshot of a software interface showing a form with several fields: 'Benefit Category', 'Benefit Amount', 'Benefit Target', 'Benefit Target Date', and 'Baseline Data Date'. The 'Benefit Category' field is selected, and a dropdown menu is open, displaying the following options: '--Select--', 'Efficiency Gains', 'Enables Digital Strategy', 'Enables Network Integrity', 'Improves Customer Satisfaction', and 'Supports Customer Growth'. The first option '--Select--' is currently selected.

- **Benefit Amount:**

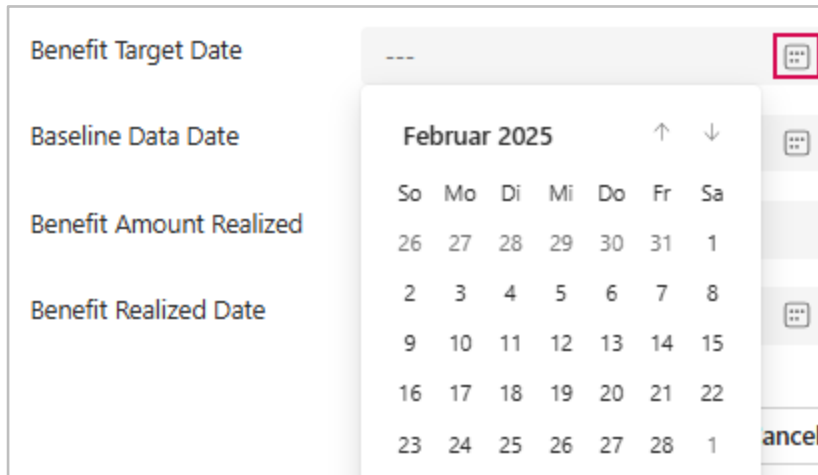
- Enter the amount.

- **Benefit Target:**

- Enter a meaningful description.

- *Benefit Target Date, Baseline Data Date, Benefit Realized Date:*

➤ Click on the calendar icon and enter the date.



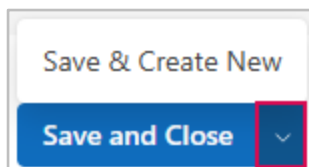
- *Benefit Amount Realized:*

➤ Enter the amount.

➤ Click *Save and Close*.

Or

➤ Click the down arrow and *Save & Create New* to add another Benefit.



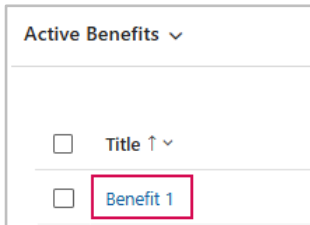
▶ A Benefit is added.

▶ The Benefit appears in the *Active Benefits* table.

17.2 Edit Benefits

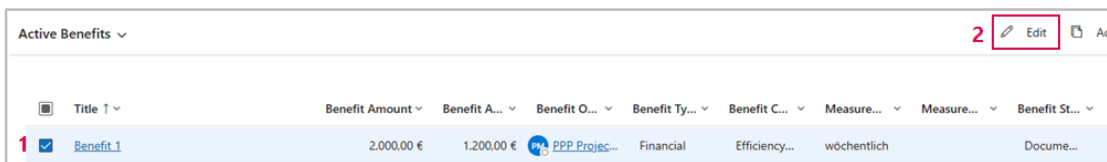
A Benefit can be edited as follows:

- Click on the preview in the *Title* column. ► The form for editing the Benefit opens.

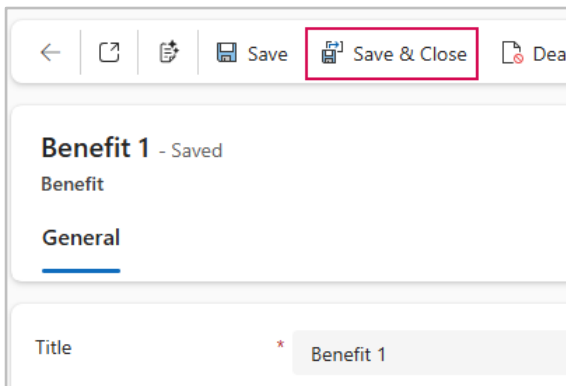


Or

- Click on the row of the desired Benefit to select it. (1)
- Click on *Edit*. (2)



- Enter the desired changes in the form.
- Click *Save & Close* to save the Benefit and finish editing.

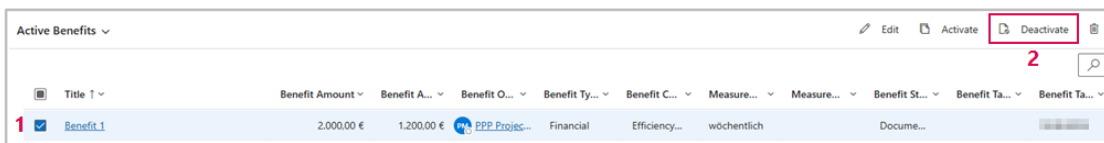


-
- Only Benefits with the status Active can be edited. Deactivated Benefits are locked for editing.
-

17.3 Deactivate and Activate Benefits

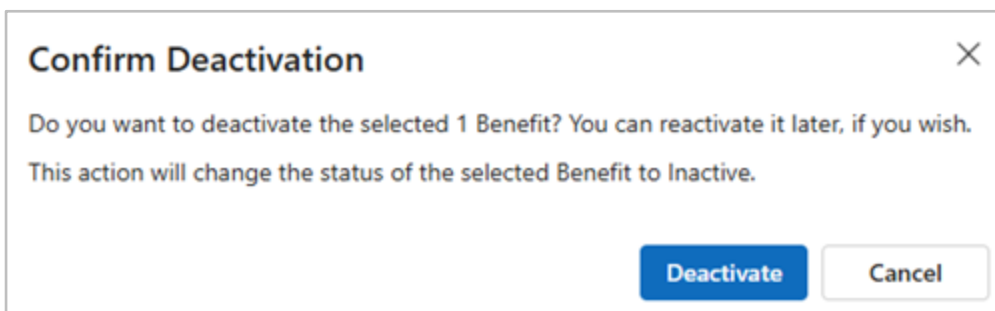
Benefits are active by default. You can deactivate Benefits:

- Select the Benefit you want to deactivate.
- Click on the Benefit row to highlight it. (1)
- Click on *Deactivate*. (2)



- ▶ The *Confirm Deactivation* field opens.

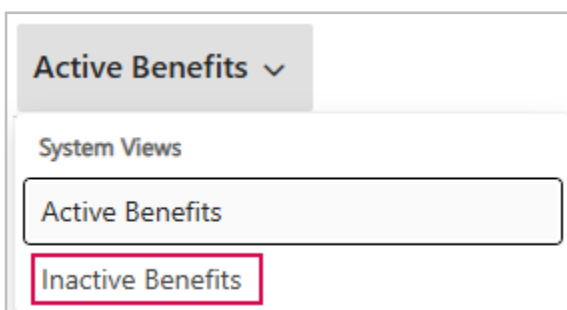
- Click *Deactivate* to deactivate the Benefit.



By default, all active and inactive Benefits are listed in the table.

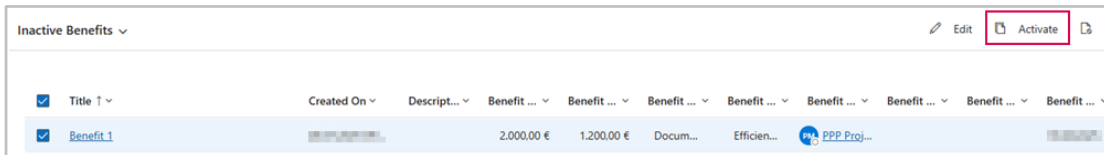
Display only inactive Benefits:

- Go to *Active Benefits*.
- Click the down arrow.
- Click on *Inactive Benefits*.

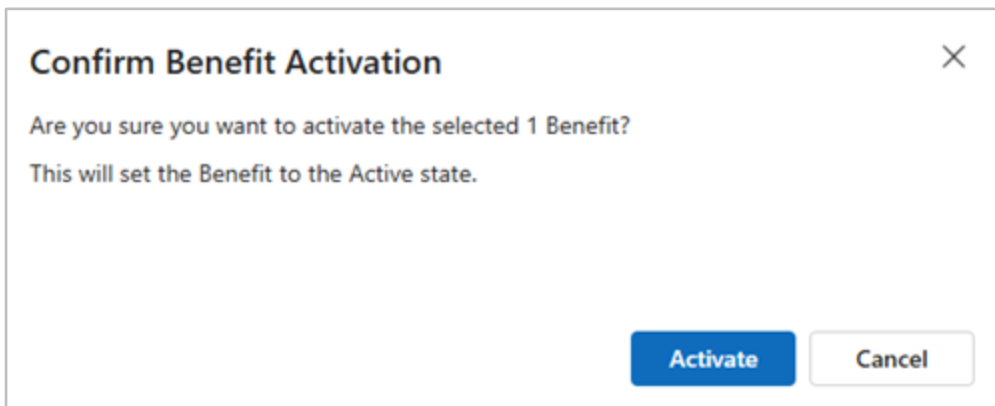


Activate Benefits:

- Select the Benefit as described above.
- Click on *Activate*.



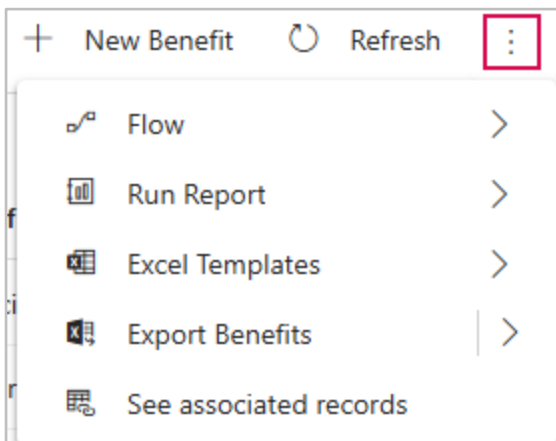
- ▶ The *Confirm Benefit Activation* field opens.
- Click on *Activate* to activate the Benefit.



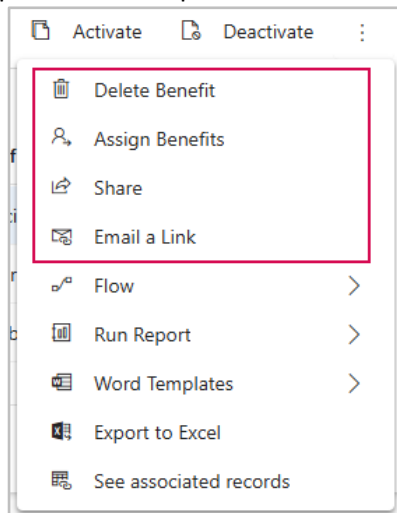
17.4 Additional Commands for Benefits

Above the *Active Benefits* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected a Benefit, additional commands related to the selected Benefit will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Benefit*: Permanently deletes the selected Benefit.

⚠ This action cannot be undone.

-
- *Assign Benefits*: Changes the owner of the selected Benefit.
 - *Share*: Shares the Benefit with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Benefit via email.
 - *Flow*: Runs a flow for the Benefit.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

18 Requirements

On the *Requirements* tab, you can record all project-related requirements centrally and in a structured manner.

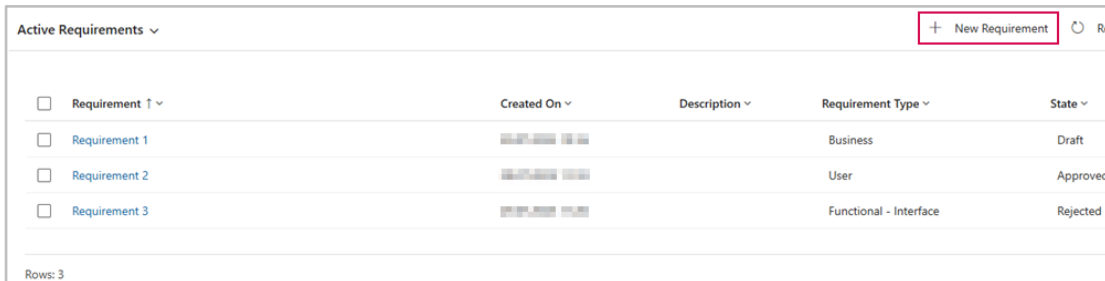
This section describes how to:

- [Add Requirements](#)  203
- [Edit Requirements](#)  208
- [Deactivate and Activate Requirements](#)  209
- [Use additional Commands for Requirements](#)  210

18.1 Add Requirements

To add a *Requirement*, proceed as follows:

- Click on *New Requirement*. ► The *Quick Create: Requirement* form for creating a Requirement opens.





Active Requirements ▾						+ New Requirement	Re
<input type="checkbox"/>	Requirement 1 ▾	Created On ▾	Description ▾	Requirement Type ▾	State ▾		
<input type="checkbox"/>	Requirement 1	■■■■■ ■■■■		Business	Draft		
<input type="checkbox"/>	Requirement 2	■■■■■ ■■■■		User	Approved		
<input type="checkbox"/>	Requirement 3	■■■■■ ■■■■		Functional - Interface	Rejected		


Rows: 3


Quick Create: Requirement ✕


General


Requirement * ---



Project *  Project X ✕ 


State --- 

Requirement Origin --- 

Requirement Type --- 

Responsible Team --- 

Owner *  PPP Project Manager (Offline) ✕ 

Stakeholders --- 


Effort Estimate ---

Hourly Rate ---

MaterialCost ---

Description ---

Solution Response ---

Save and Close  Cancel

- Fill out the form:

▶ To add a Requirement, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

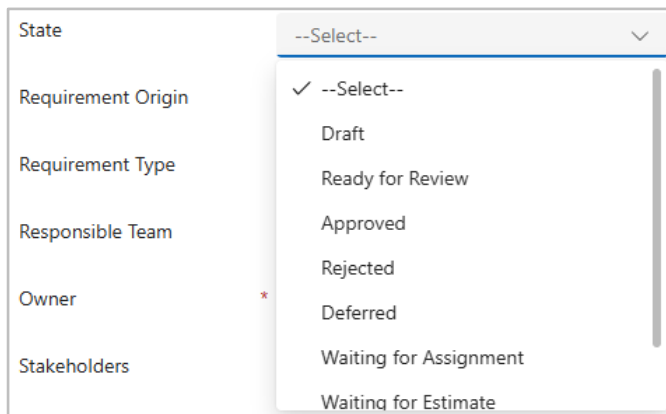
- **General:**

- **Requirement:** Enter a meaningful name for the Requirement.
- **Project:** The current project is selected by default.

▶ You can select a different project by clicking on the search icon (magnifying glass) and selecting a different project from the drop-down menu.

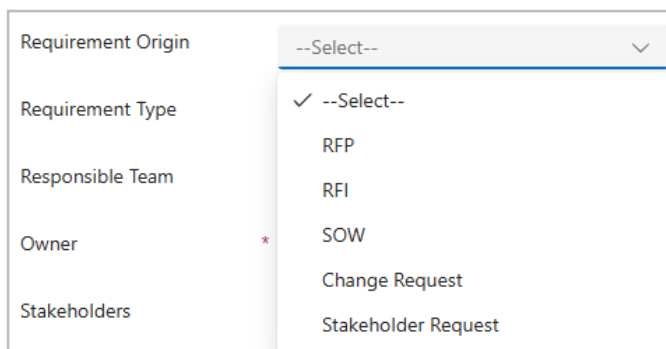
- **State:**

- Click in the field and select the status from the drop-down menu.



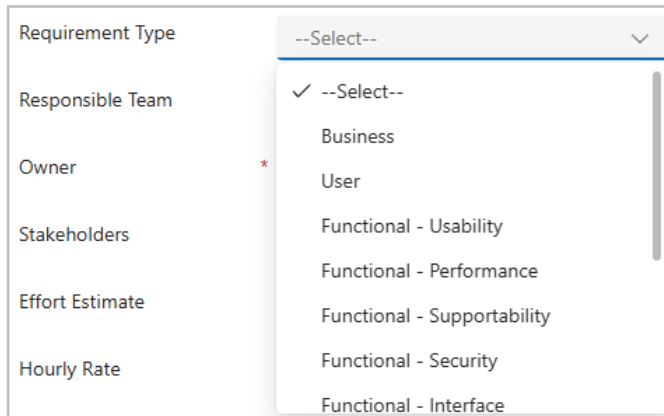
- **Requirement Origin:**

- Click in the field and select the source of the Requirement from the drop-down menu.



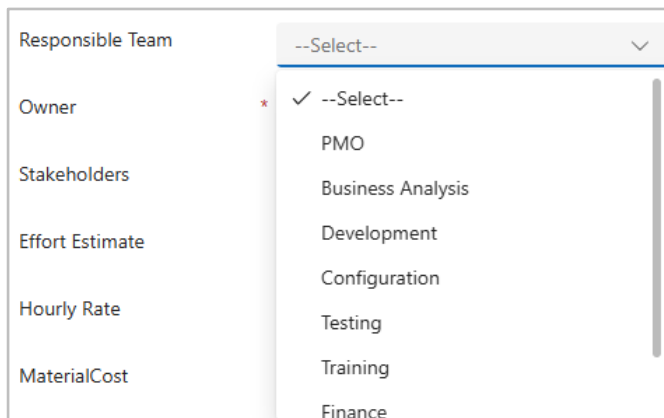
▪ **Requirement Type:**

- Click in the field and select the requirement type from the drop-down menu.



▪ **Responsible Team:**

- Click in the field and select the responsible team from the drop-down menu.



- **Owner:** Creator of the Requirement. The current user is entered by default.

▶ You can select a different owner by clicking on the search icon (magnifying glass) and selecting a different owner from the drop-down menu.

▪ **Stakeholders:**

- Click on the input field, press the Enter key, and enter the stakeholder.

▪ **Effort Estimate:**

- Enter the effort estimate numerically.

- *Hourly Rate:*

- Enter the amount.

- *Material Cost:*

- Enter the amount.

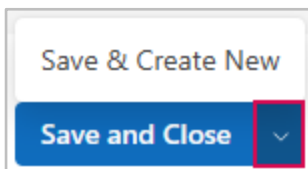
- *Description, Solution Response:*

- Enter a description and a proposed solution for the Requirement. The descriptions should be as meaningful as possible.

- Click *Save and Close*.

Or

- Click the down arrow and *Save & Create New* to add another Requirement.



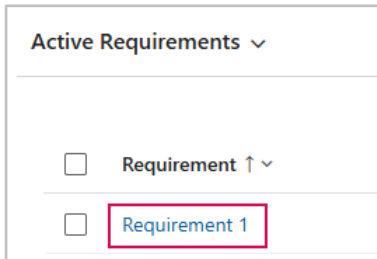
- ▶ A Requirement is added.

- ▶ The Requirement appears in the *Active Requirements* table.

18.2 Edit Requirements

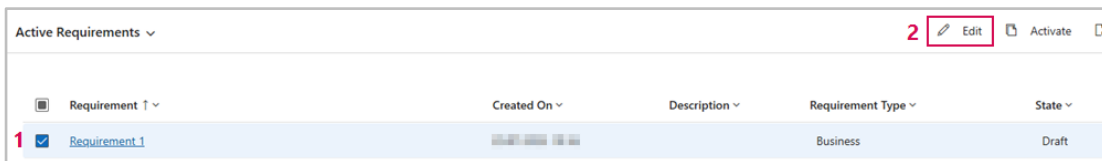
A Requirement can be edited as follows:

- Click on the preview in the *Requirement* column. ➤ The form for editing the Requirement opens.

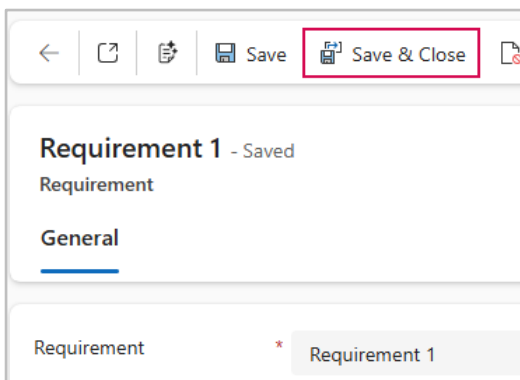


Or

- Click on the row of the desired Requirement to select it. (1)
- Click on *Edit*. (2)



- Enter the desired changes in the form.
- Click *Save & Close* to save the Requirement and finish editing.

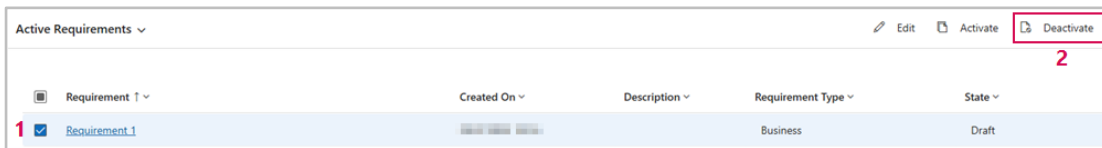


-
- Only Requirements with the status Active can be edited. Deactivated Requirements are locked for editing.
-

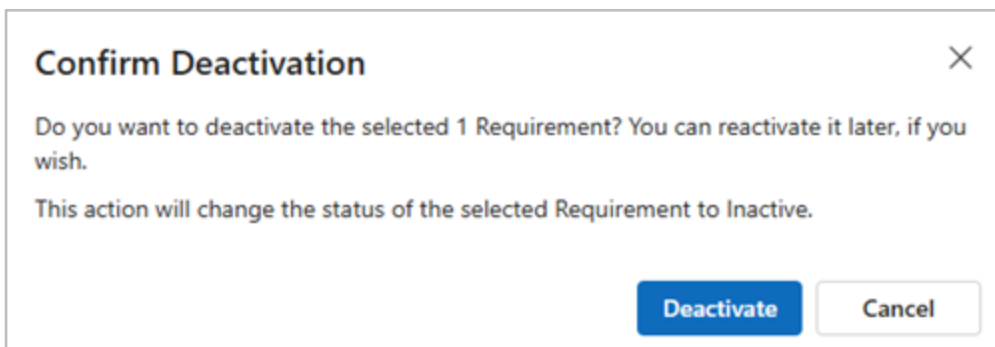
18.3 Deactivate and Activate Requirements

Requirements are active by default. You can deactivate Requirements:

- Select the Requirement you want to deactivate.
- Click on the Requirement row to highlight it. (1)
- Click on *Deactivate*. (2)



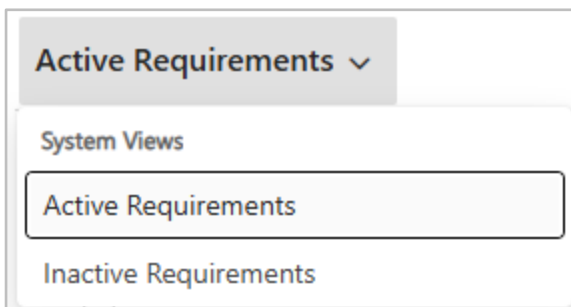
- ▶ The *Confirm Deactivation* field opens.
- Click *Deactivate* to deactivate the Requirement.



By default, all active and inactive Requirements are listed in the table.

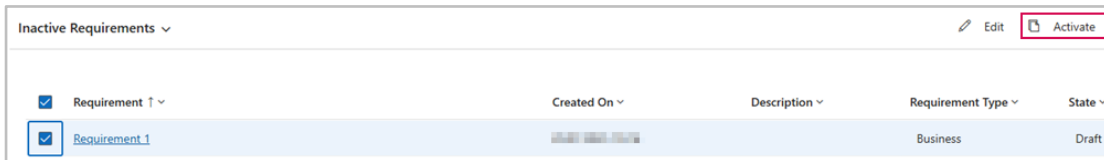
Display only inactive Requirements:

- Go to *Active Requirements*.
- Click the down arrow.
- Click on *Inactive Requirements*.

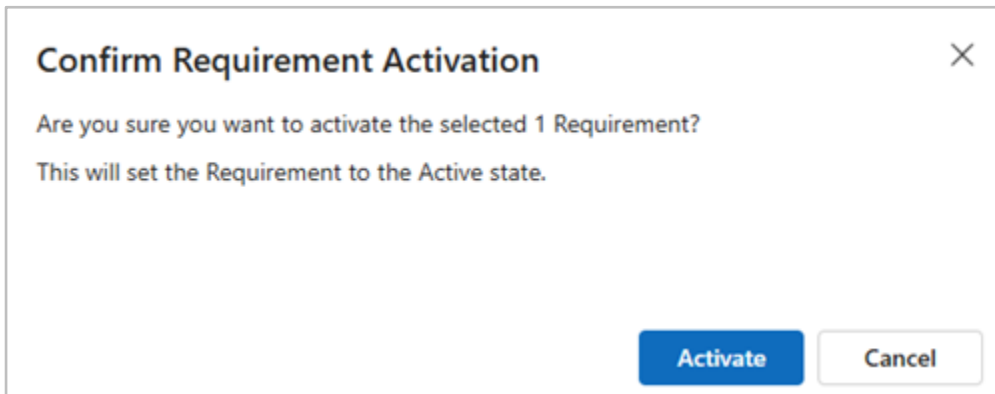


Activate Requirements:

- Select the Requirement as described above.
- Click on *Activate*.



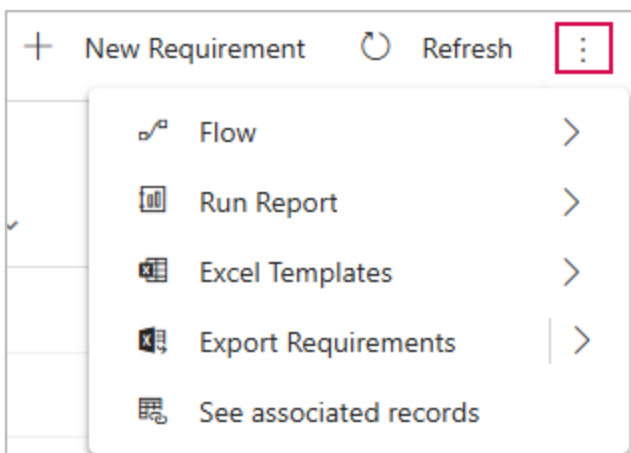
- ▶ The *Confirm Requirement Activation* field opens.
- Click on *Activate* to activate the Requirement.



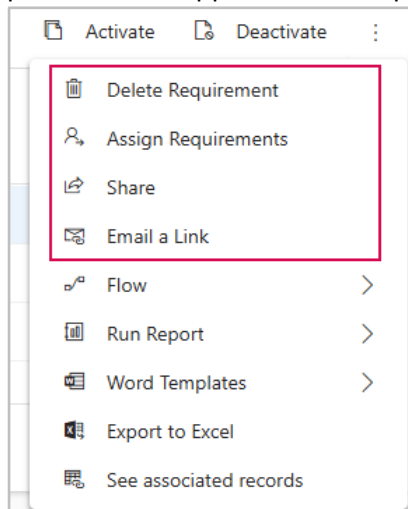
18.4 Additional Commands for Requirements

Above the *Active Requirements* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected a Requirement, additional commands related to the selected Requirement will appear in the drop-down menu:



➤ Select the desired command:

- *Delete Requirement*: Permanently deletes the selected Requirement.



⚠ This action cannot be undone.

-
- *Assign Requirements*: Changes the owner of the selected Requirement.
 - *Share*: Shares the Requirement with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Requirement via email.
 - *Flow*: Runs a flow for the Requirement.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

19 Lessons Learned

On the Lessons Learned tab, you can document insights gained during the course of the project. Both positive experiences and potential for improvement can be recorded in this section.

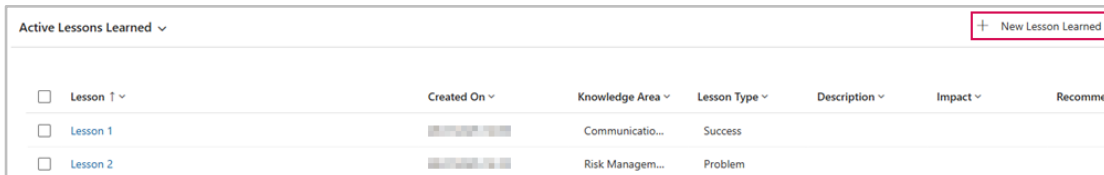
This section describes how to:

- [Add Lessons Learned](#)  212
- [Edit Lessons Learned](#)  215
- [Deactivate and Activate Lessons Learned](#)  216
- [Use additional Commands for Lessons Learned](#)  218

19.1 Add Lessons Learned

To add *Lessons Learned*, proceed as follows:

- Click on *New Lesson Learned*. ► The *Quick Create: Lesson Learned* form for creating a Lesson Learned opens.



Lesson	Created On	Knowledge Area	Lesson Type	Description	Impact	Recommended
Lesson 1		Communication...	Success			
Lesson 2		Risk Managem...	Problem			

Quick Create: Lesson Learned ✕

General

Lesson *

Project * ✕

Owner * ✕

Knowledge Area

Lesson Type

Description

Impact

Recommendations

Rating

- Fill out the form:

▶ To add a Lesson Learned, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

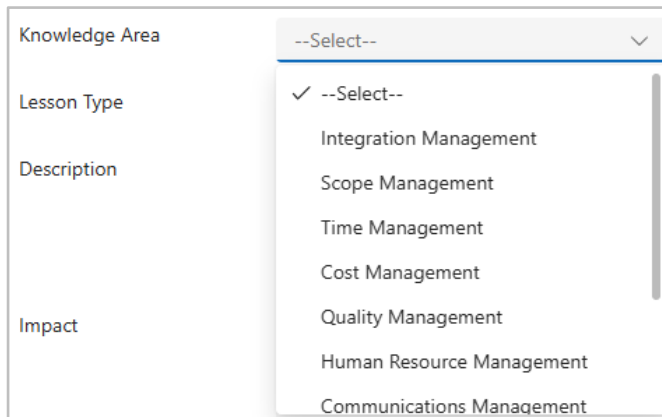
- **General:**

- **Lesson:** Enter a meaningful name for the Lesson Learned.
- **Project:** The current project is selected by default.
- **Owner:** Creator of the Lesson Learned. The current user is entered by default.

▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

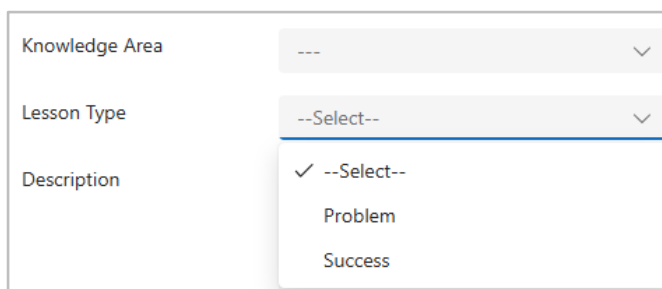
- **Knowledge Area:**

➤ Click in the field and select the knowledge area from the drop-down menu.



- **Lesson Type:**

➤ Click in the field and select the type of Lesson Learned from the drop-down menu.



- **Description, Impact, Recommendations::**

➤ Enter a description, impact, and recommendation. The descriptions should be as meaningful as possible.

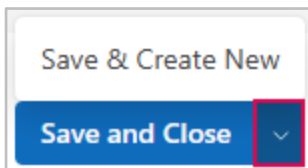
▪ **Rating:**

➤ Give your rating by selecting 1 (minimum) to 5 stars (maximum).

➤ Click *Save and Close*.

Or

➤ Click the down arrow and *Save & Create New* to add another Lesson Learned.



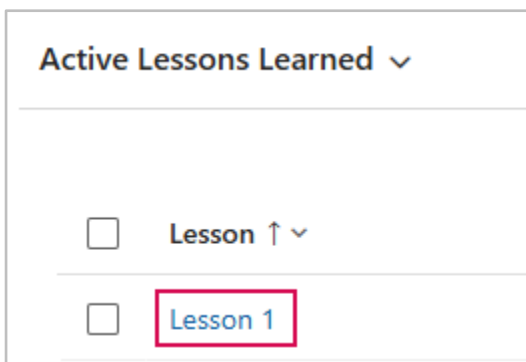
▶ A Lesson Learned is added.

▶ The Lesson Learned appears in the *Active Lessons Learned* table.

19.2 Edit Lessons Learned

A Lesson Learned can be edited as follows:

➤ Click on the preview in the *Lesson* column. ▶ The form for editing the Lesson Learned opens.



Or

➤ Click on the row of the desired Lesson Learned to select it. (1)

- Click on *Edit*. (2)

The screenshot shows a table titled 'Active Lessons Learned'. The table has columns for Lesson, Created On, Knowledge Area, Lesson Type, Description, and Impact. The first row is highlighted in blue and contains 'Lesson 1', a date, 'Communicatio...', and 'Success'. In the top right corner, there are buttons for 'Edit' and 'Activate'. The 'Edit' button is highlighted with a red box and has a red '2' next to it.

- Enter the desired changes in the form.
- Click *Save & Close* to save the Lesson Learned and finish editing.

The screenshot shows a form titled 'Lesson 1 - Saved Lesson Learned'. The form has a 'General' section. At the bottom, there is a 'Lesson' field with a red asterisk and a dropdown menu showing 'Lesson 1'. Above the form, there is a toolbar with buttons for 'Save' and 'Save & Close'. The 'Save & Close' button is highlighted with a red box.

-
- ▶ Only Lessons Learned with the status Active can be edited. Deactivated Lessons Learned are locked for editing.
-

19.3 Deactivate and Activate Lessons Learned

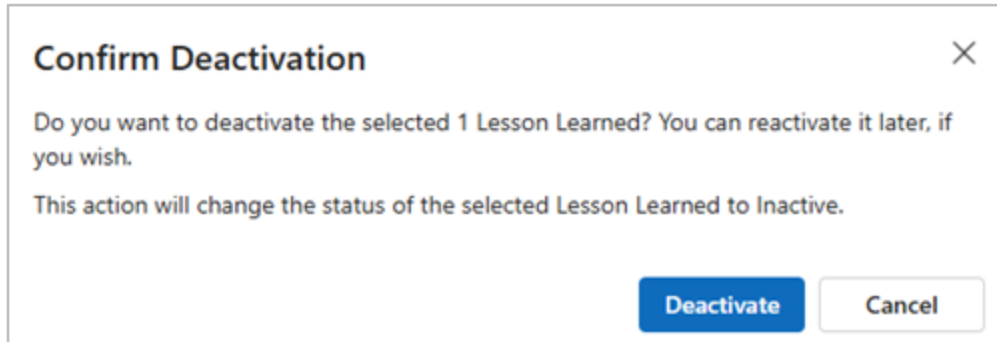
Lessons Learned are active by default. You can deactivate Lessons Learned:

- Select the Lesson Learned you want to deactivate.
- Click on the Lesson Learned row to highlight it. (1)
- Click on *Deactivate*. (2)

The screenshot shows the same 'Active Lessons Learned' table as before. The 'Lesson 1' row is highlighted in blue. In the top right corner, there are buttons for 'Edit', 'Activate', and 'Deactivate'. The 'Deactivate' button is highlighted with a red box and has a red '2' next to it.

▶ The *Confirm Deactivation* field opens.

➤ Click *Deactivate* to deactivate the Lesson Learned.



By default, all active and inactive Lessons Learned are listed in the table.

Display only inactive Lessons Learned:

➤ Go to *Active Lessons Learned*.

➤ Click the down arrow.

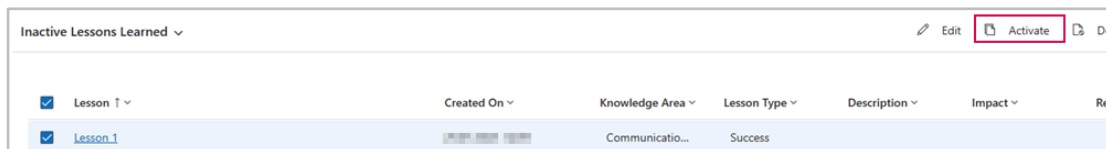
➤ Click on *Inactive Lessons Learned*.



Activate Lessons Learned:

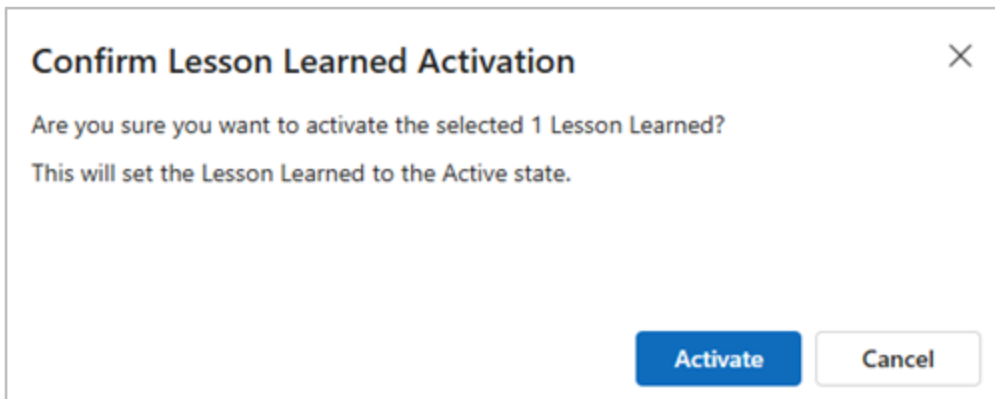
➤ Select the Lesson Learned as described above.

➤ Click on *Activate*.



▶ The *Confirm Lesson Learned Activation* field opens.

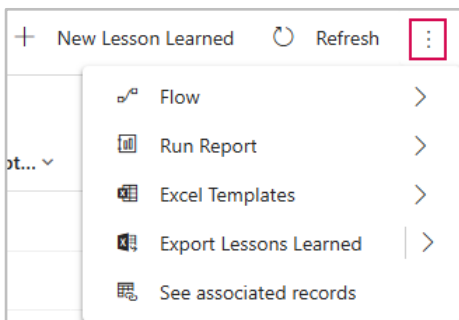
- Click on *Activate* to activate the Lesson Learned.



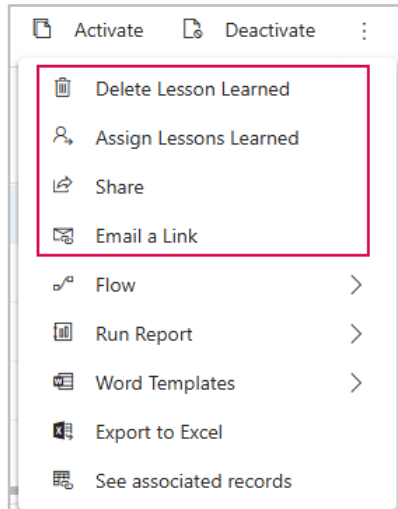
19.4 Additional Commands for Lessons Learned

Above the *Active Lessons Learned* table, there are additional commands that you can use:

- Click on the three dots to the left above the table. ▶ A drop-down menu will open.



► If you have selected a Lesson Learned, additional commands related to the selected Lesson Learned will appear in the drop-down menu:



➤ Select the desired command:

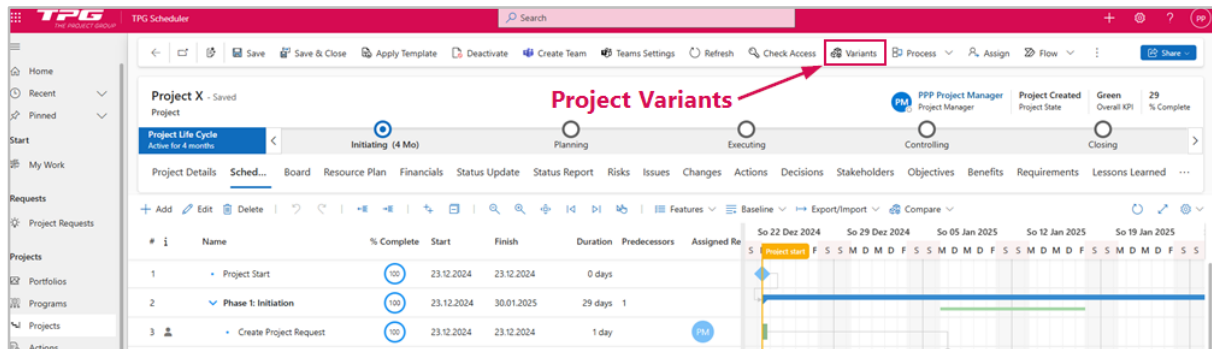
- *Delete Lesson Learned*: Permanently deletes the selected Lesson Learned.

⚠ This action cannot be undone.

-
- *Assign Lessons Learned*: Changes the owner of the selected Lesson Learned.
 - *Share*: Shares the Lesson Learned with selected individuals or teams without changing ownership.
 - *Email a Link*: Sends a link to the selected Lesson Learned via email.
 - *Flow*: Runs a flow for the Lesson Learned.
 - *Run Report*: Select a report to run.
 - *Word Templates*: Creates Word documents and templates.
 - *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table.
 - *See associated records*: Shows records associated with this view.

20 Project Variants

The project variants feature is an optional component of TPG ProjectPowerPack (PPP) with TPG Scheduler. With project variants, you can simulate different scenarios of a project. This allows you to account for changes or issues that have occurred or may occur during the project's runtime.




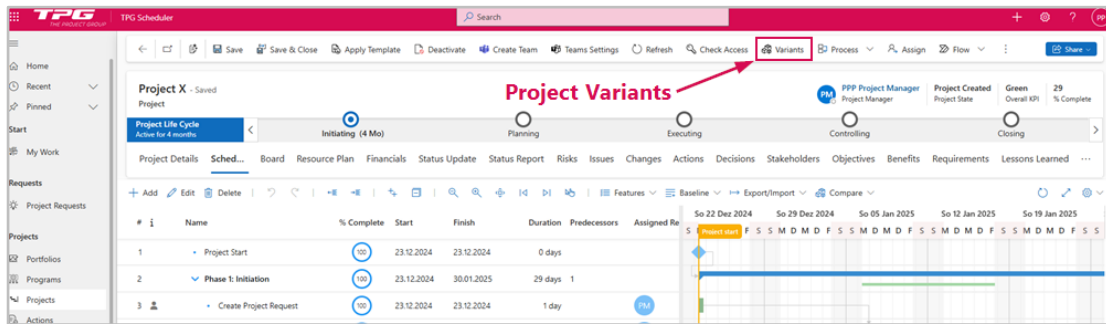
A variant is a copy of a project that can be edited without altering the original project. Variants can be compared with the original project and other variants in the schedule, resource plan, and financial plan. A new variant is created with a copy of the following tables:

- Project Details (some fields)
- Team Members
- Tasks
 - Dependencies
 - Assignments
 - Baselines
- Resource Plan
- Financials

20.1 User Interface

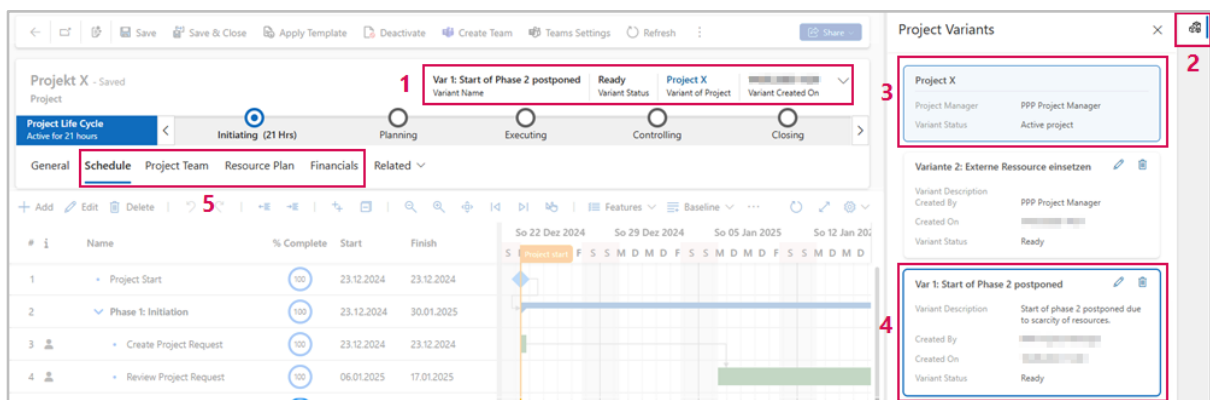
Project variants are created and opened in the *Project Variants* sidebar within the original project.

- To open the *Project Variants* sidebar, open the original project and click on *Variants* in the command bar .

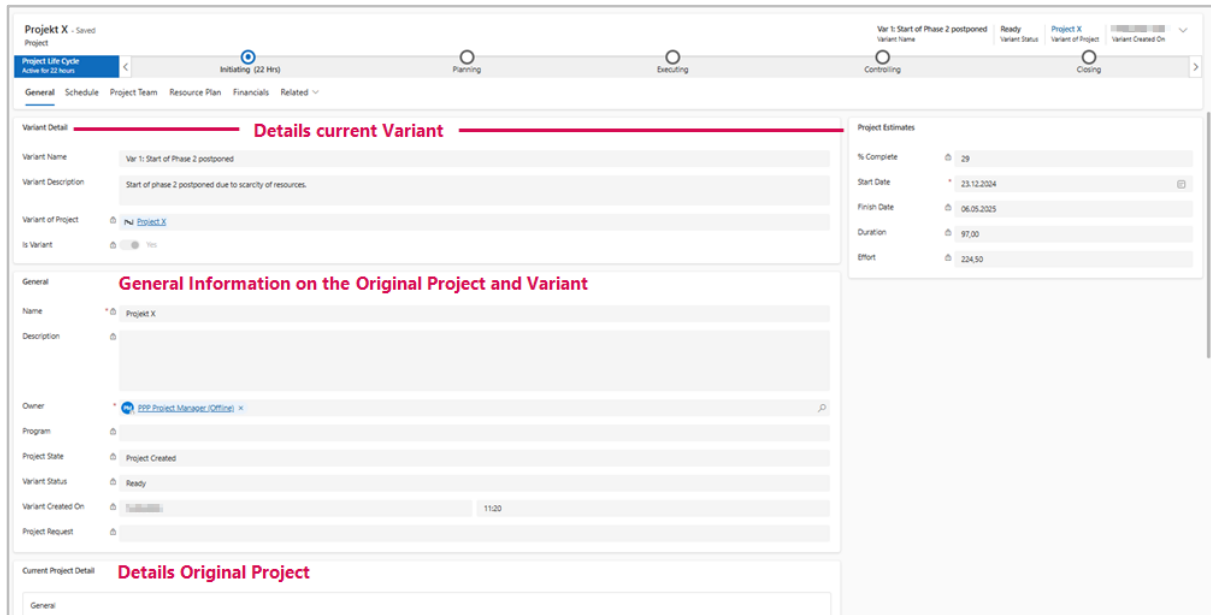


The user interface of the project variant is divided into the following areas:

- Information about the currently opened variant and the name of the original project (1)
- Show/hide *Project Variant* sidebar (2)
- Original Project (3)
- Variant whose project plan is currently open (blue framed) (4)
- Tabs with copied data from the original project (5)



Under *General*, you will find data and information about the original project and the selected variant:



20.2 Working with Variants


In the following, you will learn how to work with variants. We will guide you step by step through the process:

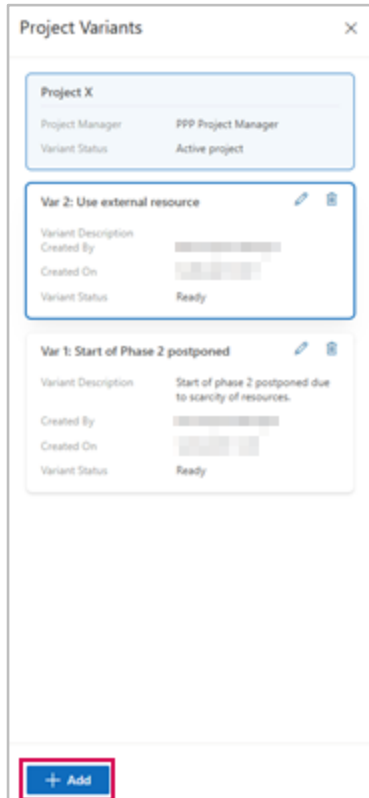
- [Create a Variant](#) ²²²
- [Edit a Variant](#) ²²⁶
- [Compare Variants and Original Projects](#) ²²⁹

20.2.1 Create a Variant

To create a variant of a project plan, follow these steps:

- Open the project for which you want to create a variant.

- Click on *Variants* in the **Command bar** . ➤ The *Project Variants* sidebar will open. This area displays all previously created variants of the project.



- Click on *Add*. ➤ The fields *Variant Name* and *Variant Description* will appear.
- Enter the name of the variant in the *Variant Name* field. (1)
- Optionally, you can add a description for the variant. (2)

➤ Make sure to use a meaningful name and description. This will make it easier to compare with the original project and other variants later.

➤ Click on *Create*. (3)

The image shows a 'Project Variants' dialog box with a close button (X) in the top right corner. It contains two input fields: 'Variant Name *' and 'Variant Description'. The 'Variant Name *' field contains the text 'Var 1: Start of Phase 2 postponed' and is marked with a red '1'. The 'Variant Description' field contains the text 'Start of phase 2 postponed due to scarcity of resources.' and is marked with a red '2'. At the bottom of the dialog, there are two buttons: 'Create' (highlighted in blue) and 'Cancel', with a red '3' positioned above the 'Create' button.

➤ The variant is displayed in the *Project Variants* sidebar under the original project.

Project Variants ✕

Project X

Project Manager: PPP Project Manager

Variant Status: Active project

Var 2: Use external resource ✎ 🗑

Variant Description: [blurred]

Created By: [blurred]

Created On: [blurred]

Variant Status: Ready

Var 1: Start of Phase 2 postponed ✎ 🗑

Variant Description: Start of phase 2 postponed due to scarcity of resources.

Created By: [blurred]

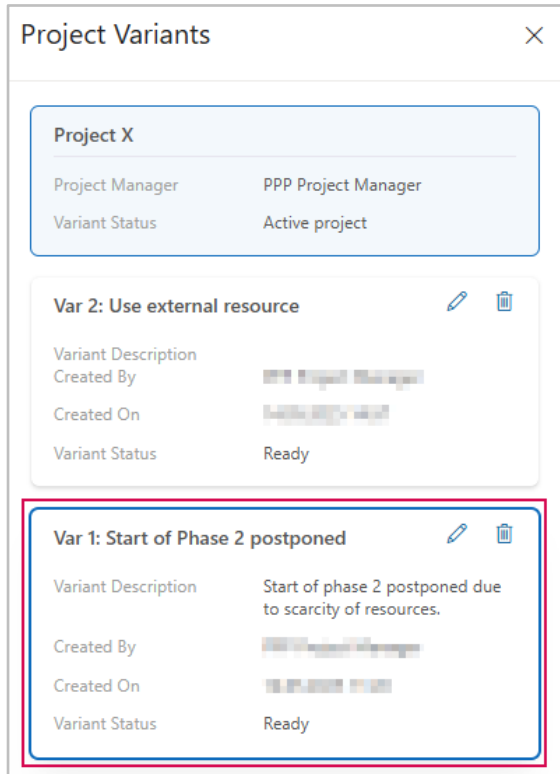
Created On: [blurred]

Variant Status: Ready

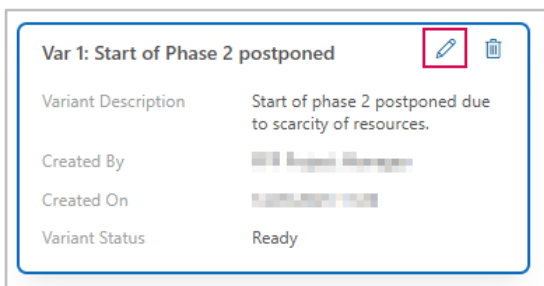
▶ The variant includes the schedule with assignments, the project team, the resource plan, and the financial plan of the original project.

20.2.2 Edit a Variant

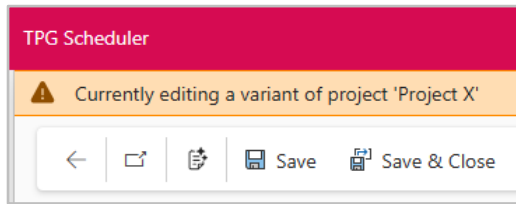
To display and edit data in a variant, select the desired variant (e.g. Var 1) in the *Project Variants* sidebar.



- Click on the desired variant or on the edit icon for the variant. ➤ The corresponding project plan opens.



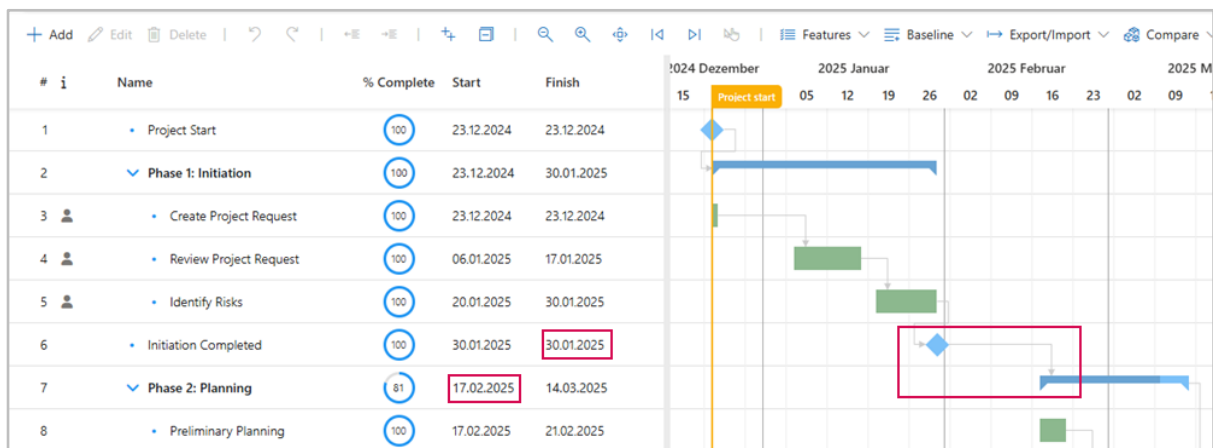
For a short time, a banner under the **Header Bar** ¹⁰ indicates that you are editing a variant.



- Edit the data on the project tabs as required. How to edit the data is described in detail in the chapters **Task planning in the Schedule** ³², **Resource Planning** ⁷⁷ and **Budget Planning** ⁹⁰.

Example:

In this example, the schedule is changed: An interval of 10 working days is inserted before phase 2. The variant project thus ends 2 weeks later than the original project.

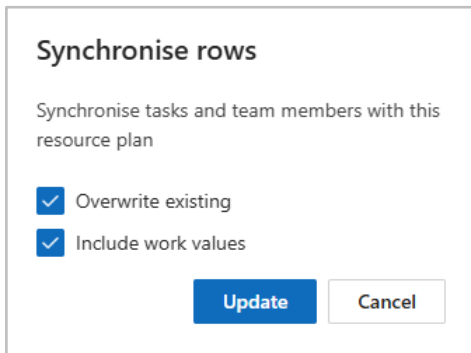


If changes are made to the schedule or assignments, the resource plan must be adjusted.

- Open the *Resource Plan* tab and click on *Sync*. ▶ The *Synchronise rows* dialog box opens.



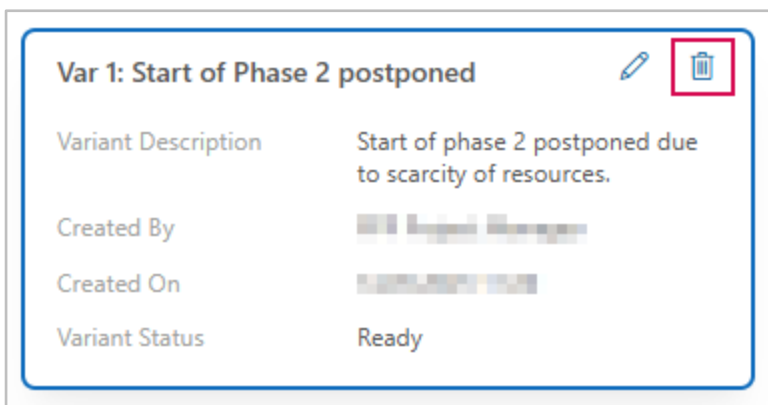
- Click *Overwrite existing*.
- Click *Include working values* if you also want to transfer the working values.
- Click on *Update*.



- ▶ There should no longer be any resource overloads in the resource plan.
- If the finances are affected by changes, open the *Financials* tab and adjust the data by moving the costs to later periods. (see [Budget Planning](#) (90))

Delete Variant:

- In the *Project Variant* sidebar, select the variant you want to delete.
- Click on the delete icon.

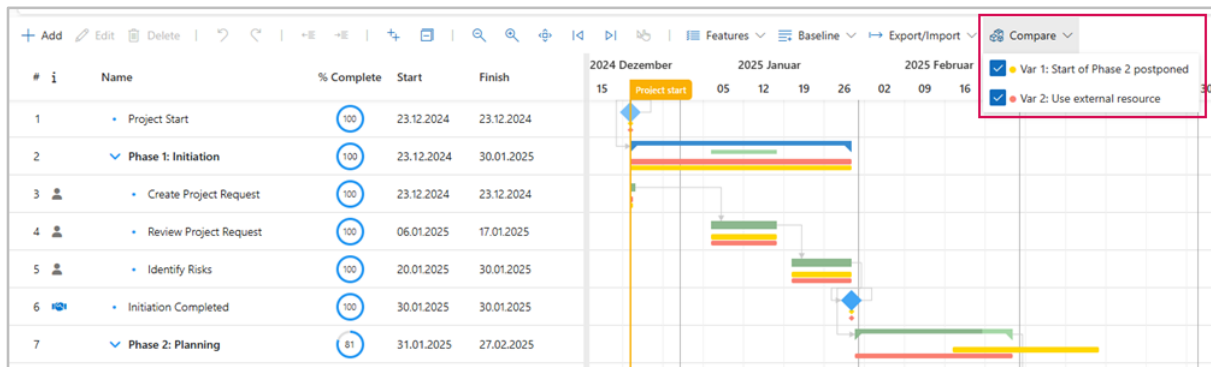


20.2.3 Compare Variants and Original Projects

Project variants can be compared with the original project and its other variants on the *Schedule*, *Resource Plan* and *Financials* tabs. This is possible in the plan of the original project or one of the variants.

➤ Click on *Compare*. ▶ A drop-down menu with all project variants appears.

➤ Click on the variants that you want to compare with the currently open plan.



▶ You can select up to 3 variants for comparison in the schedule.

▶ A colored dot in front of the selected variant indicates the color in which the process bar is displayed in the Gantt chart.

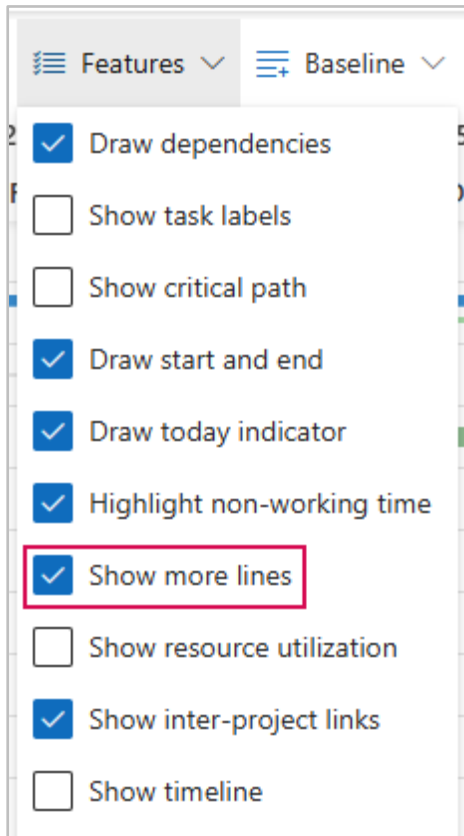
▶ On the *Resource Plan* and *Financials* tab, you can compare all variants at once. These are displayed one below the other in the table.

Variant Name
> Project X (3)
> Var 1: Start of Pha... (5)
> Var 2: Use extern... (3)

The compact view is recommended for a better overview.

- In the schedule:

➤ Click on *Features* and select *Show more lines*.



- In the Resource or Financials plan:

➤ Click on Settings (gear wheel) and select *Show more lines*.

