TPG PPP - Scheduler User Guide 2.15 EN

Version: 2.15.
Status: 3/19/2026

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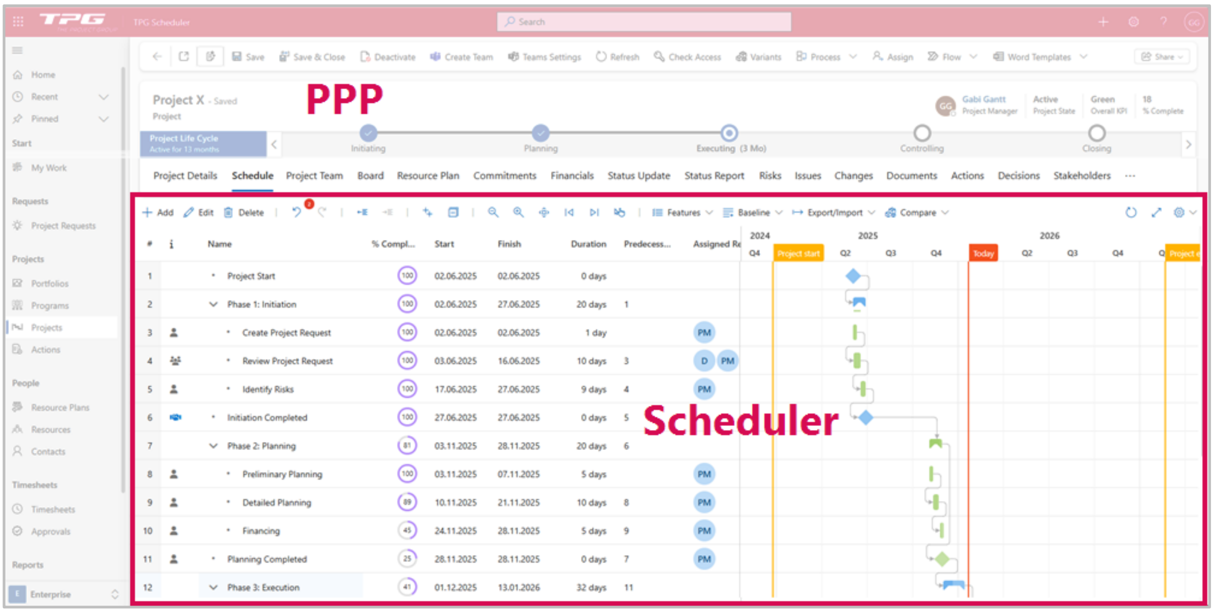
1 General Features

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 33 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 33 with traffic light indicators and project attributes (progress, KPI, start and finish date, etc.)
- Kanban view of actions 158
- Resource management 81 with resource attributes (department, cost rate, availability)
- Project requests with drivers and approval process

- Assignment of project types and templates
- Task planning 33 and resource allocation 81 with TPG Scheduler
- Recording of budget, forecasts and actual values 98 in time periods
- Risks 129, problems 139, changes 147, actions 158 and decisions 177 at project level
- Project assignment: drivers 228, objectives 194, benefits 202, requirements 211
- Stakeholder analysis 186 and Lessons Learned 220
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- 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

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▶ 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 10
- Workspace 11
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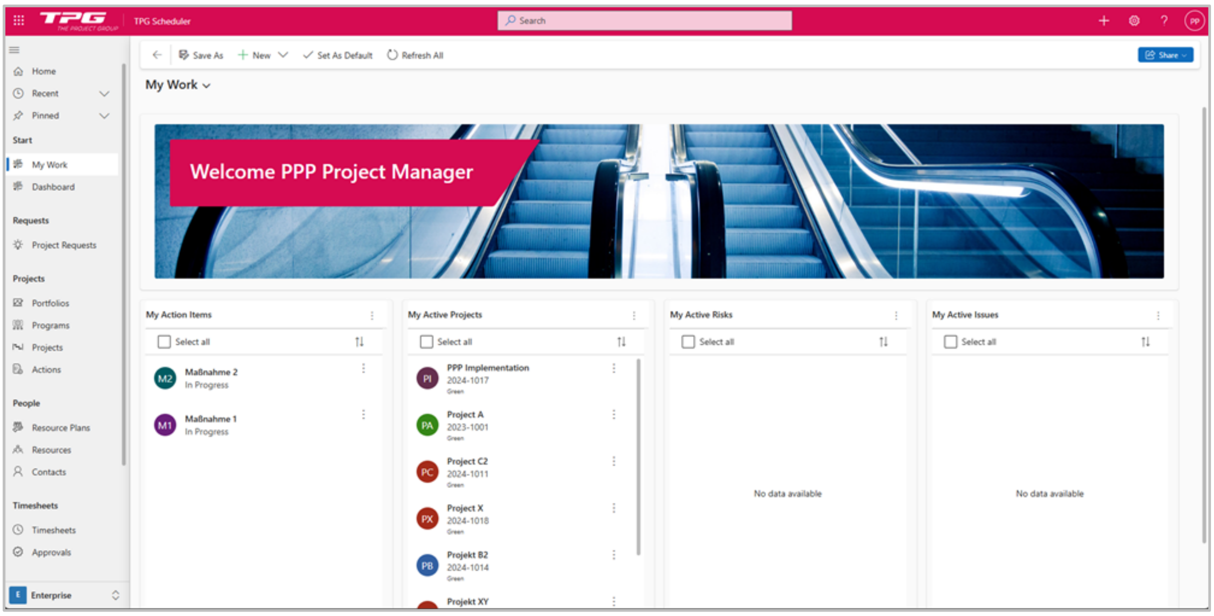
2.1 Overview

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:

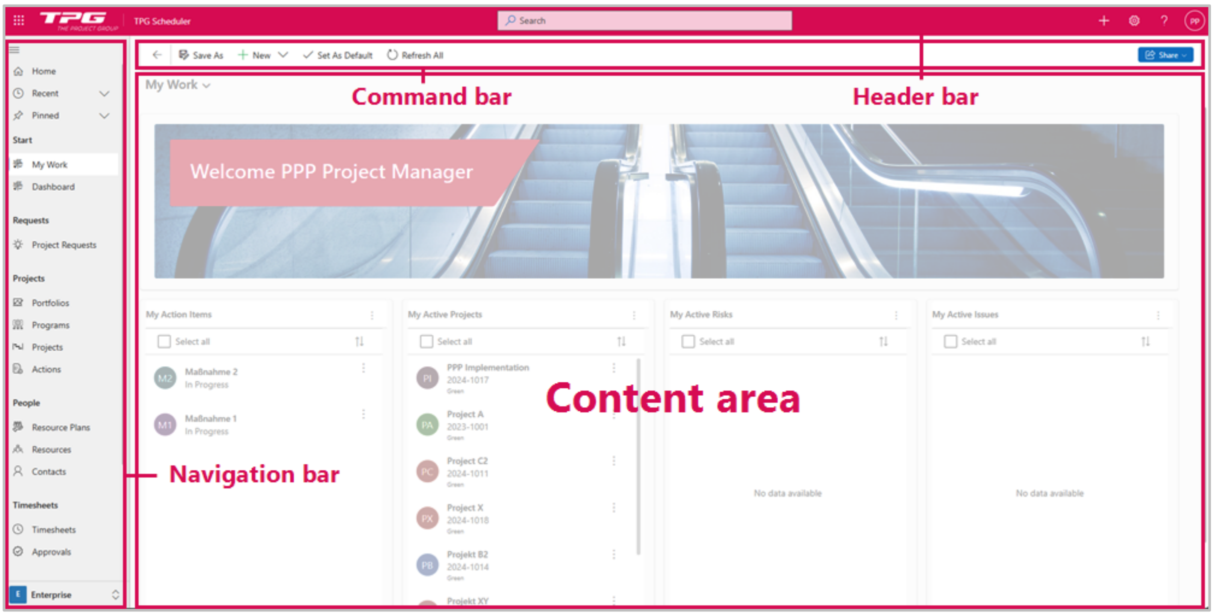
- My Actions Items
- My Active Projects
- My Active Risks
- My Active Issues



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:** 14 Buttons depending on the content area
- **Navigation bar** 18: 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



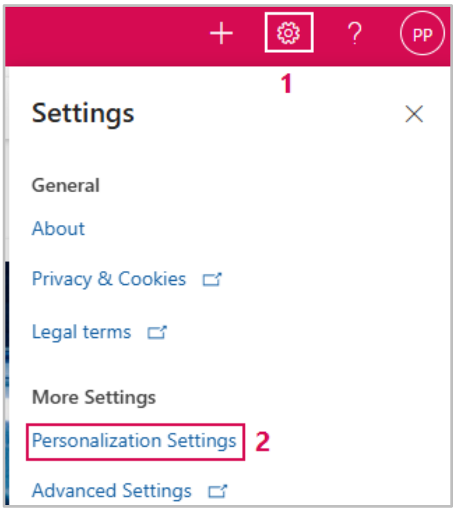
2.3 Language Settings

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)

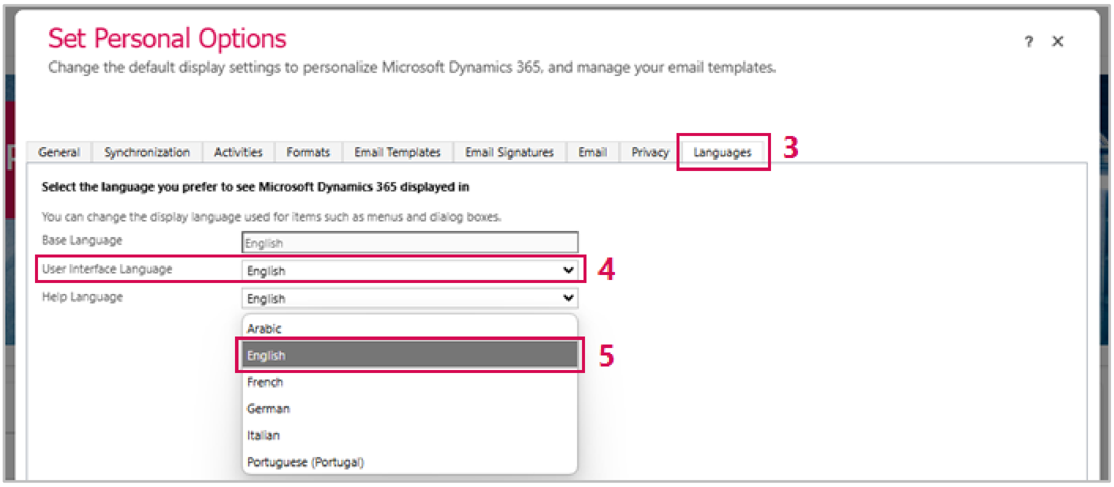
➢ Click on *Personalization Settings* (2)



➢ 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).

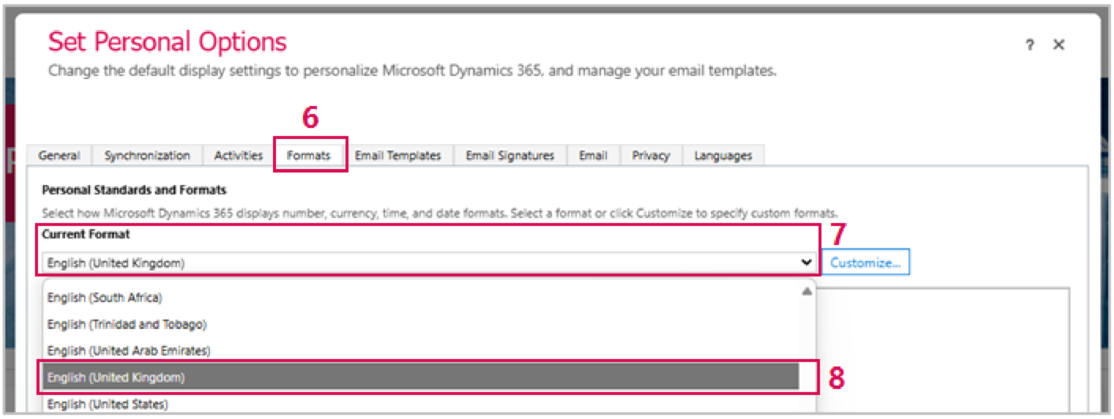


Customize formats of number, currency, time and date information:

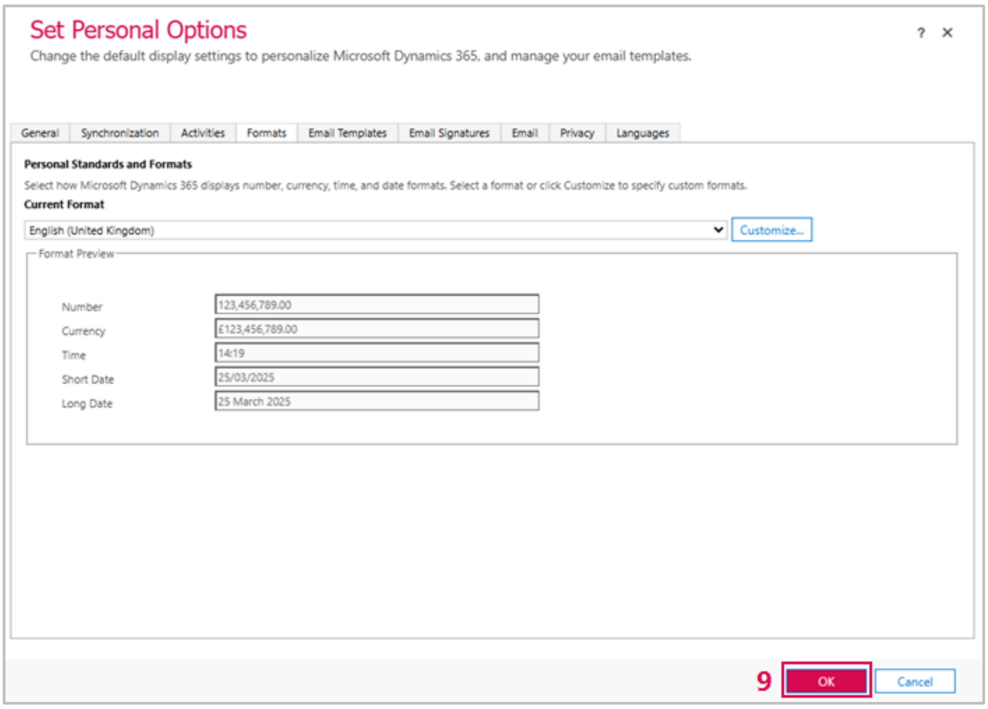
➢ Click on the *Formats* tab (6).

➢ 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.

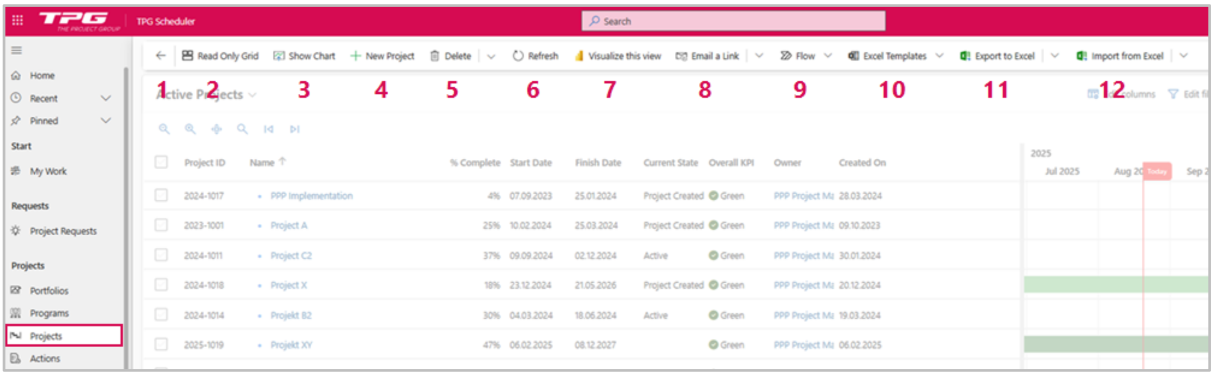
2.4 Command Bar

The Command Bar is located above the Content Area 11.

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:



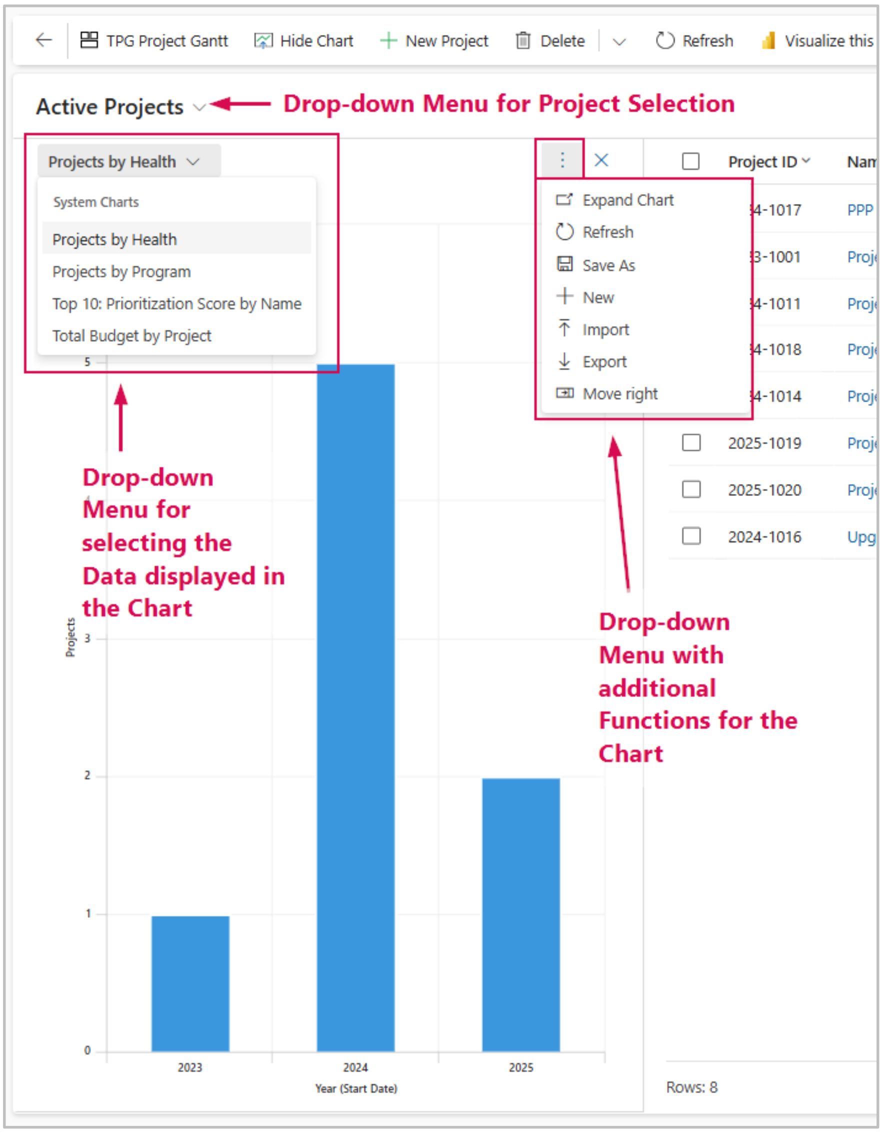
- *Go Back:* Navigates to the previously opened page. (1)
- *Read Only Grid:* Gantt Chart is hidden. (2)

  ➢ Click on *Read Only Grid* ▶ The Gantt Chart is hidden and only the table with the active projects is displayed.

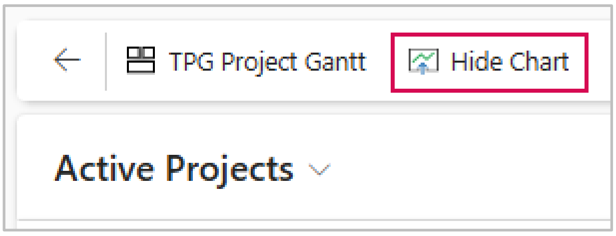
  ➢ Click on *TPG Project Gantt* to display the Gantt Chart again.

- *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.

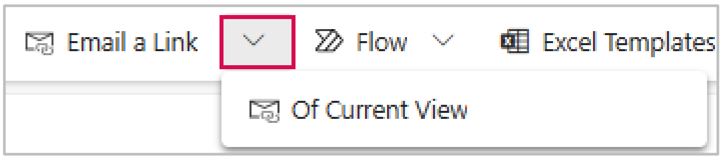


- *New Project:* Create a new Project. (4)
- *Delete:* Deletes the Projects. (5)

⚠ This action cannot be undone.

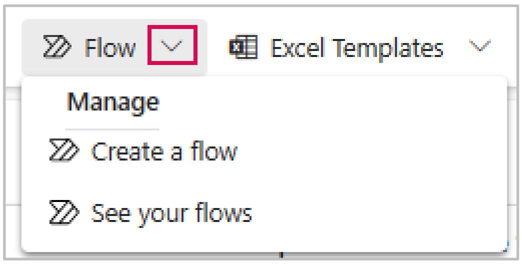
- *Refresh*: Page is being updated. (6)
- *Visualize this view*: Creation of a visual report in Power BI about the current view. (7)
- *Email a Link*: Sends a link to selected data records by email. (8)

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



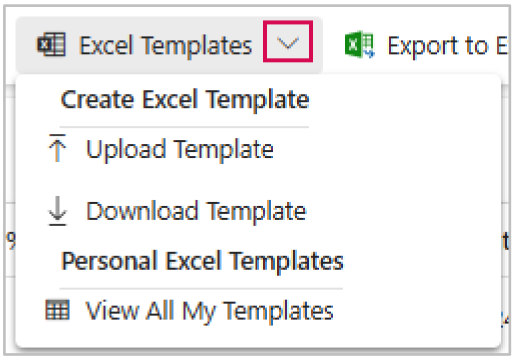
- *Flow:* Runs a Flow for the selected project. (9)

➢ Click the down arrow to manage Flows.



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

➢ Click the down arrow to create Excel templates.



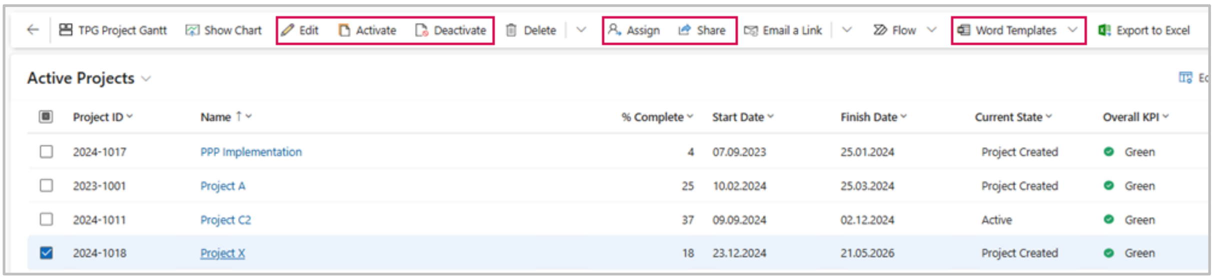
- *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table. (11)
- *Import from Excel:* Import data from Excel spreadsheet. (12)

▶ 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:

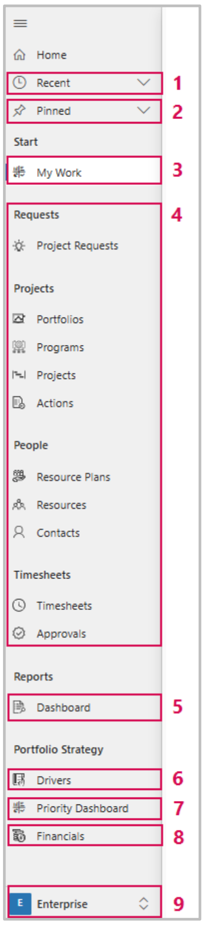
- *Edit:* Edit Project.
- *Activate:* Activate Project.
- *Deactivate:* Deactivate Project.
- *Assign:* Changes the owner of the selected Project.
- *Share:* Shares the Project with selected individuals or teams without changing ownership.
- *Word Templates:* Creates Word documents and templates.



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* 19 (9)



2.6 Product Information

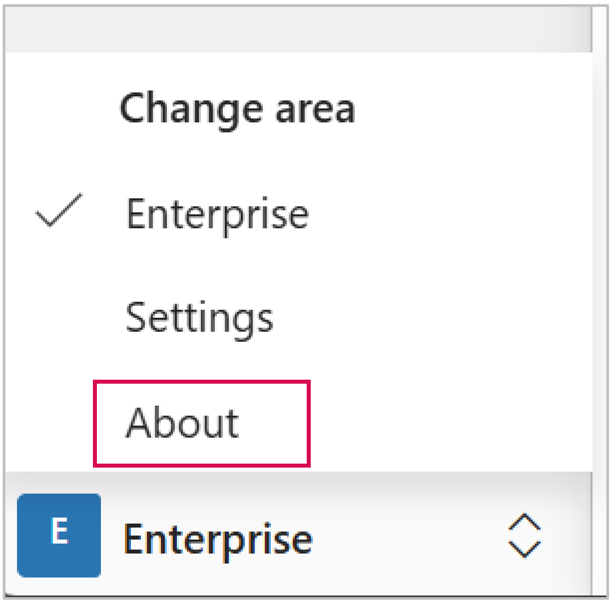
In the *About* section, you will find important information about PPP:

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

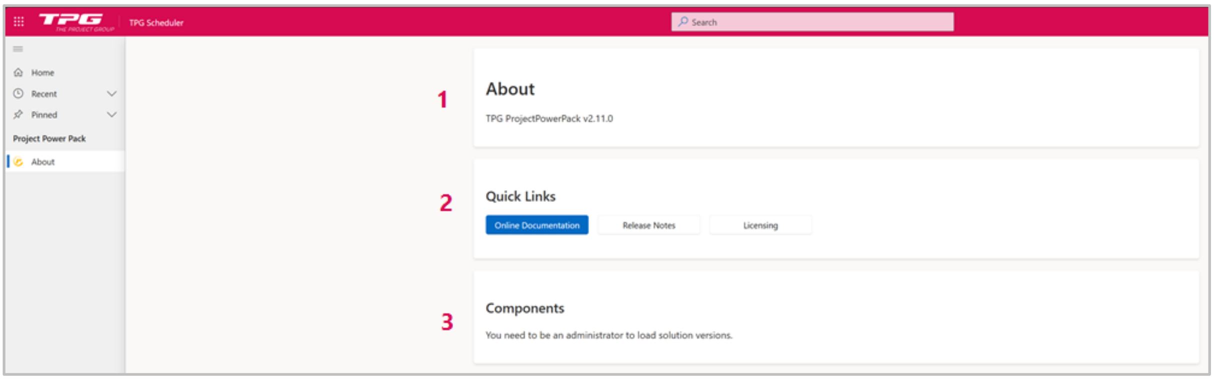
To access the product information, follow these steps:

➢ 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.



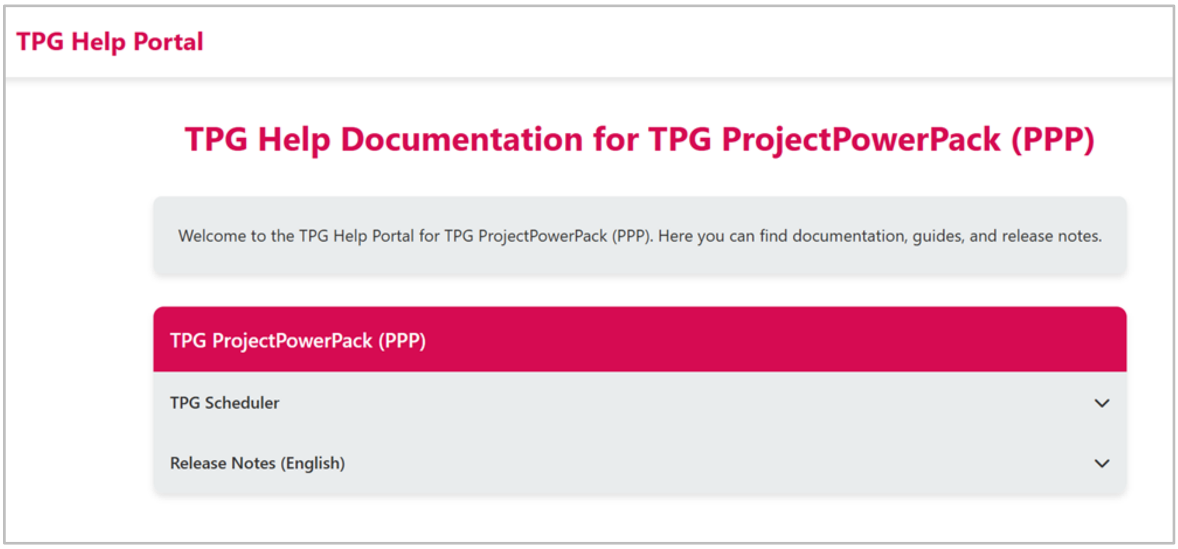
Opening User Guides and Release Notes:

➢ 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.

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3 Project

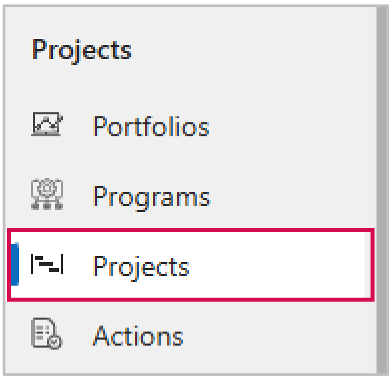
This section describes how to create a new project with TPG PPP.

- Create new Project 22
- Project Overview 23

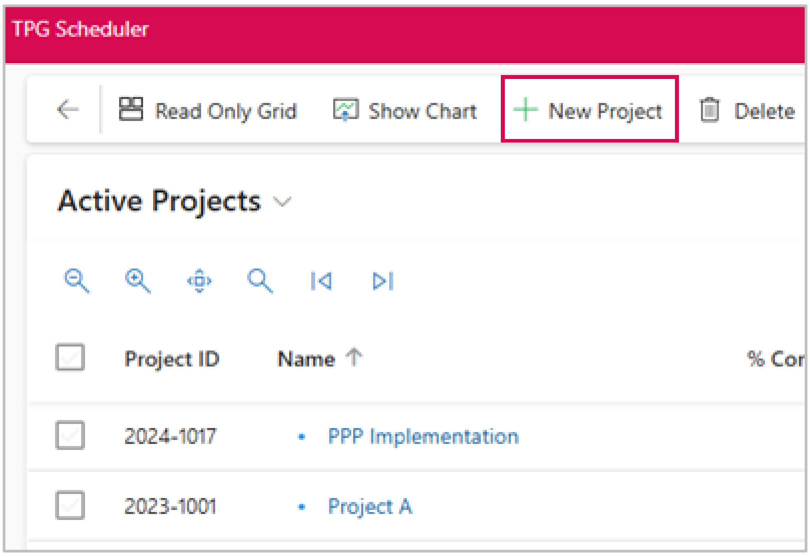
3.1 Create new Project

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

➤ Click on *Projects* in the navigation bar. ▶ A list with all active projects 23 opens.

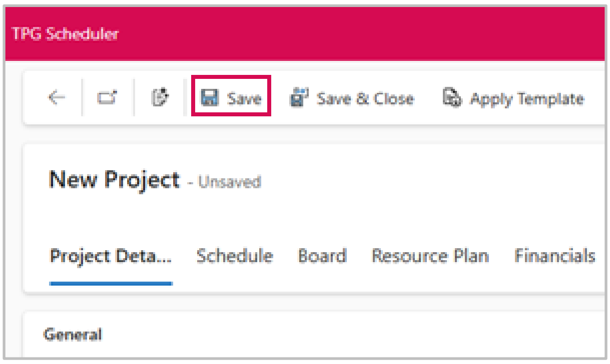


➤ Click *New Project* in the command bar. ▶ The *Project Details* tab opens.



➢ Fill in the project master data. (see Project Details 27)

➢ Click *Save* in the command bar.



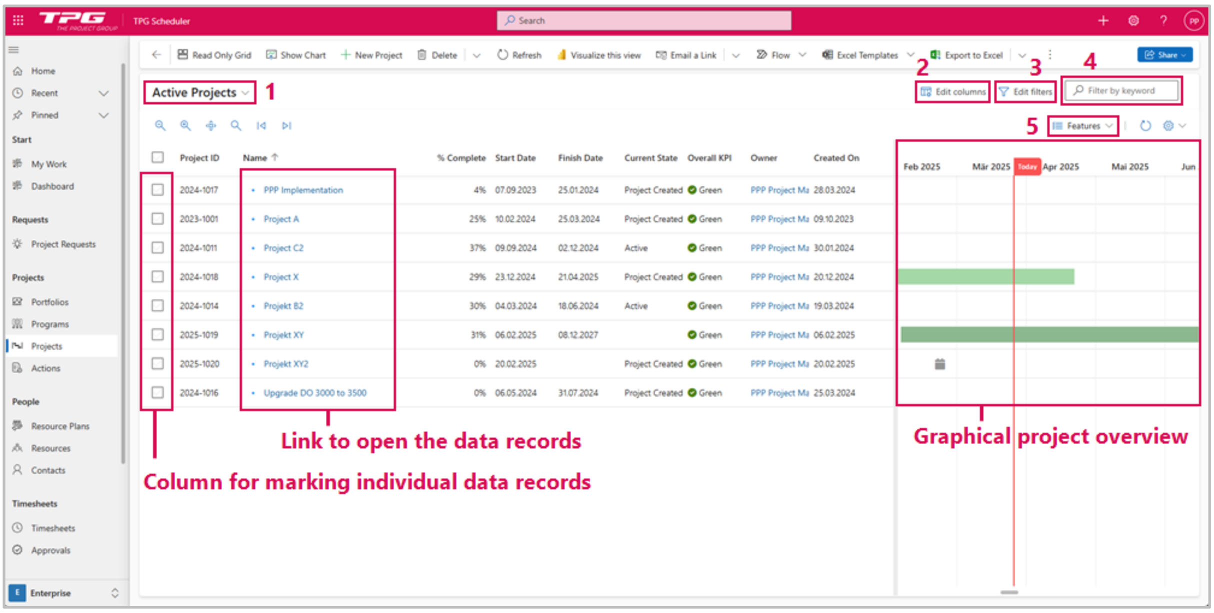
▶ A new project is created.

3.2 Project Overview

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

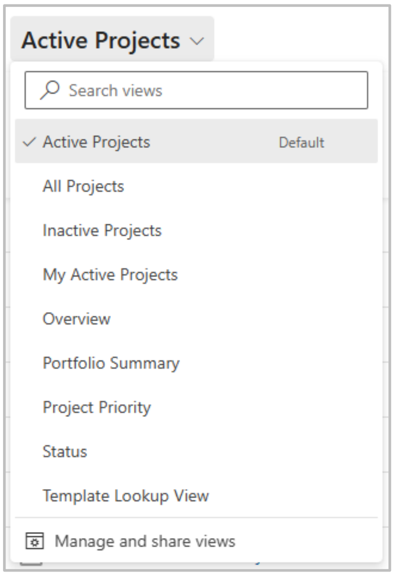
The views are divided into two areas:

- 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).

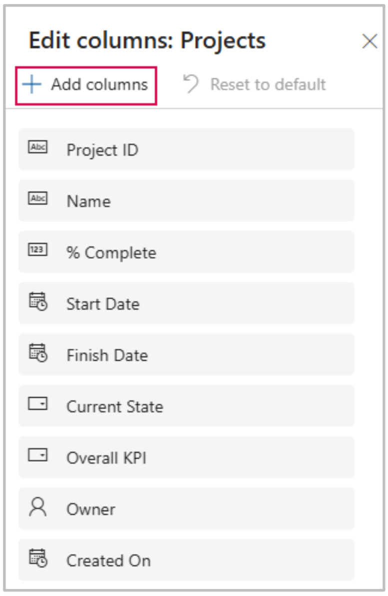


There are options to customize the view:

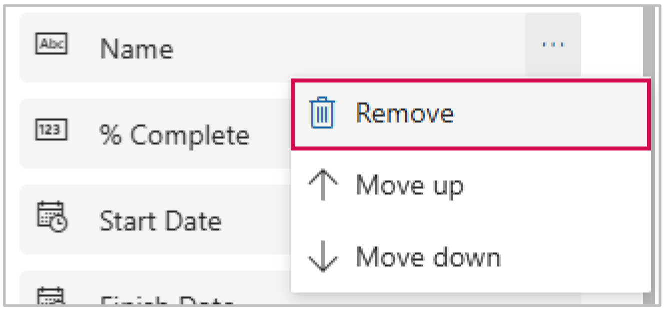
- Selection menu of displayed projects (1): *Active projects* are displayed by default. Further display options are available for selection:
  - Click on the arrow. ▶ A drop-down menu opens.
  - Click on the desired display option.



- *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.

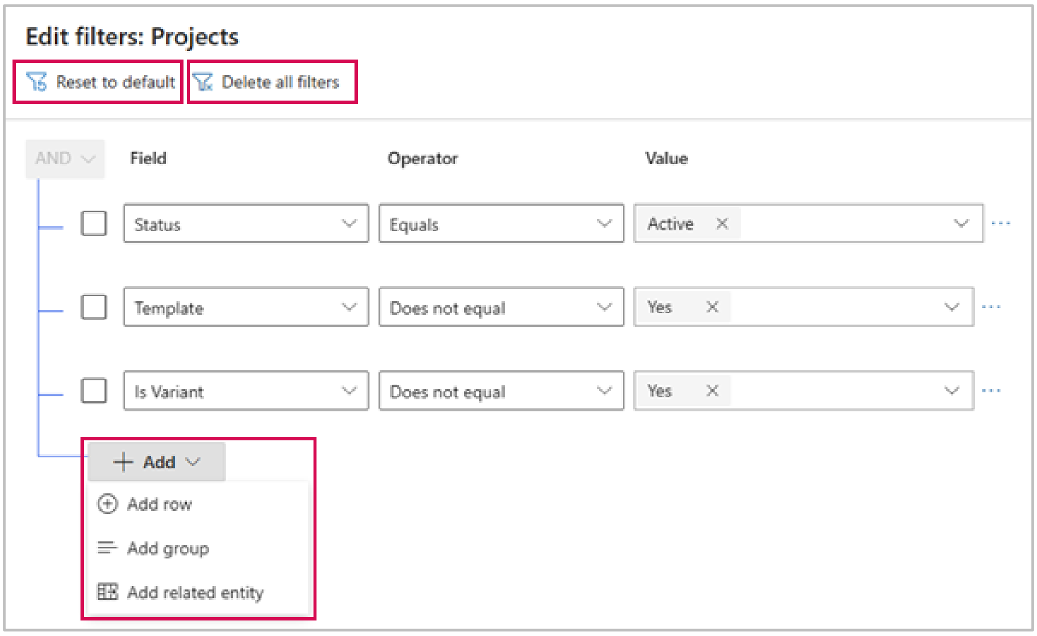


- Click *Reset to default* to restore the default settings.
- Click on *Apply* to apply the changes to the view.

- *Edit filters* (3): Filter options for displayed projects.

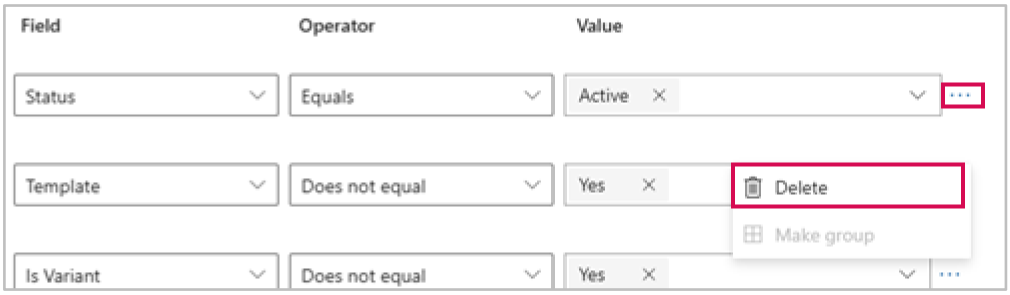
➢ Click on *Add*. ▶ A drop-down menu opens.

➢ 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.

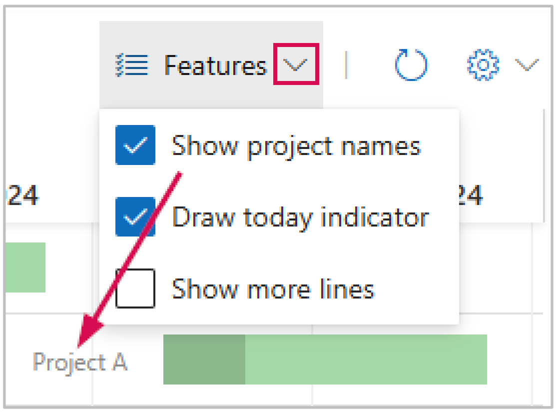
  ➢ Click on the cross in the *Filter by keyword* field to delete the filter.

  ▶ The projects whose names contain the keyword are displayed.

- *Features* (5): Elements in graphical overview.

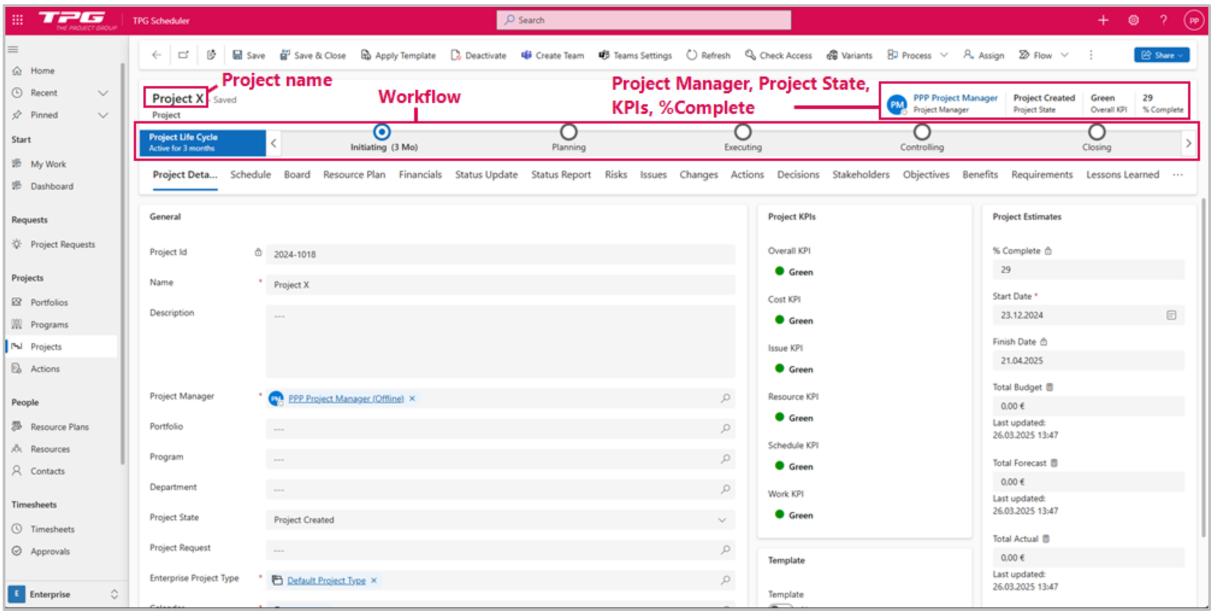
  ➢ Click on the arrow. ▶ A drop-down menu opens.

  ➢ 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 27
- Project KPIs 29
- Project Estimates 31
- Template 32

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.

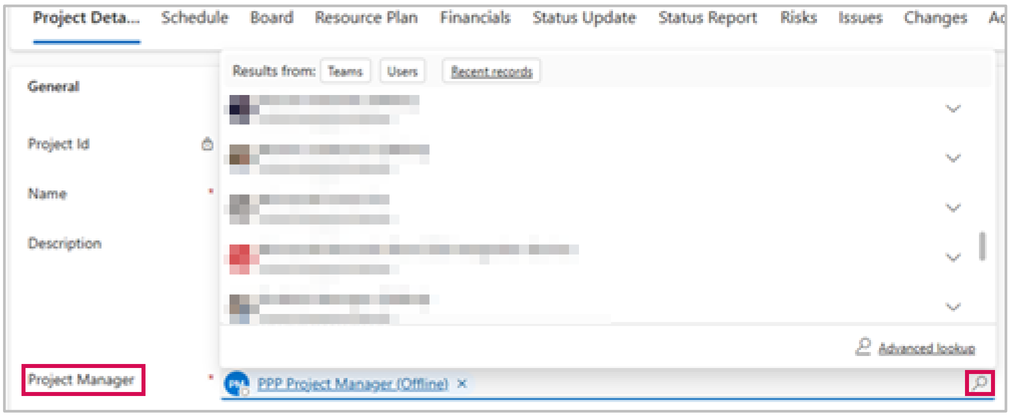
- *Project Id*: Is assigned automatically.
- *Name*: Name of the project.

➢ 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*.

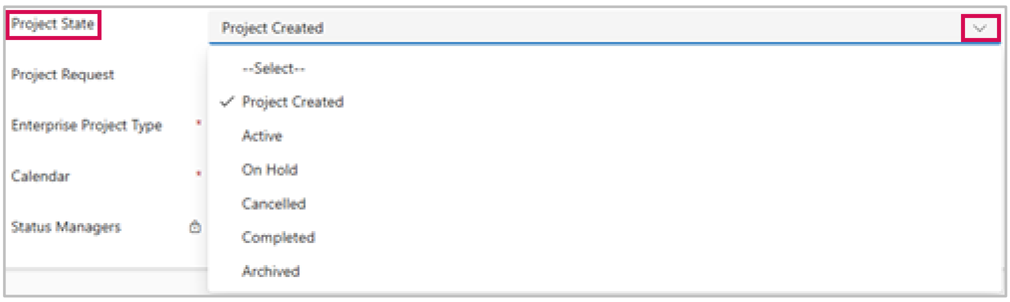
- *Department*: Assign project to a department.

  ▶ 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.

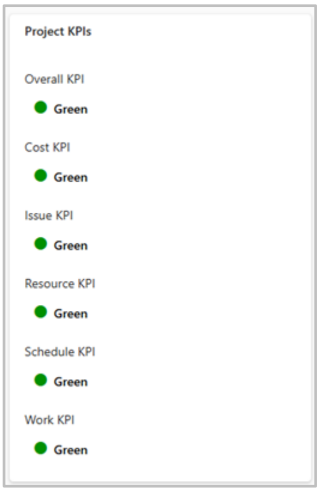
4.2 Project KPIs

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.

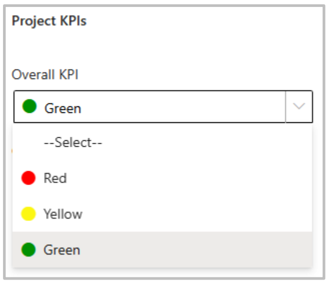
You can change the status of the KPIs in this area:

➢ 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

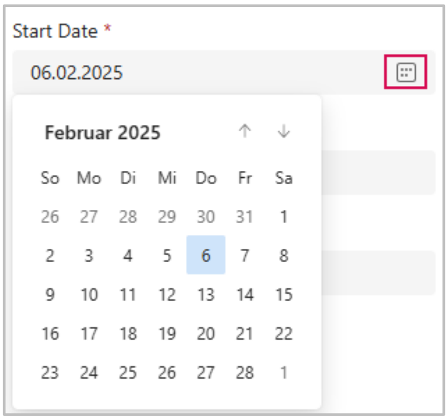
In this section you will find an overview of the project budget and schedule:

➢ %Completed: Progress of the entire project in percent.

▶ This field is updated automatically. The progress is calculated on the Schedule tab. (see Progress Indicator 71)

➢ *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 47)

- *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.

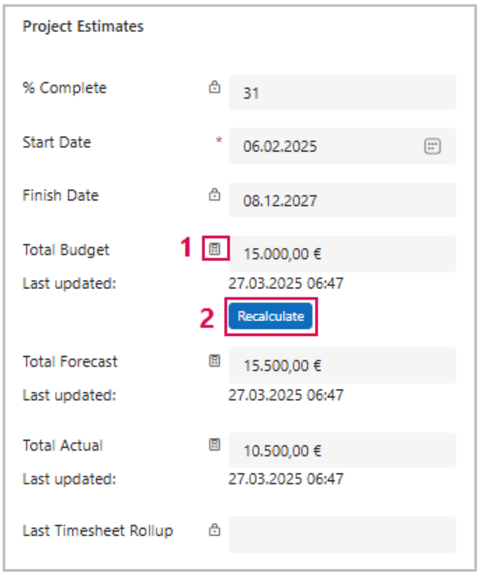
▶ Budgets are entered on the *Finances* tab.

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.



- *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 18)

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 11.

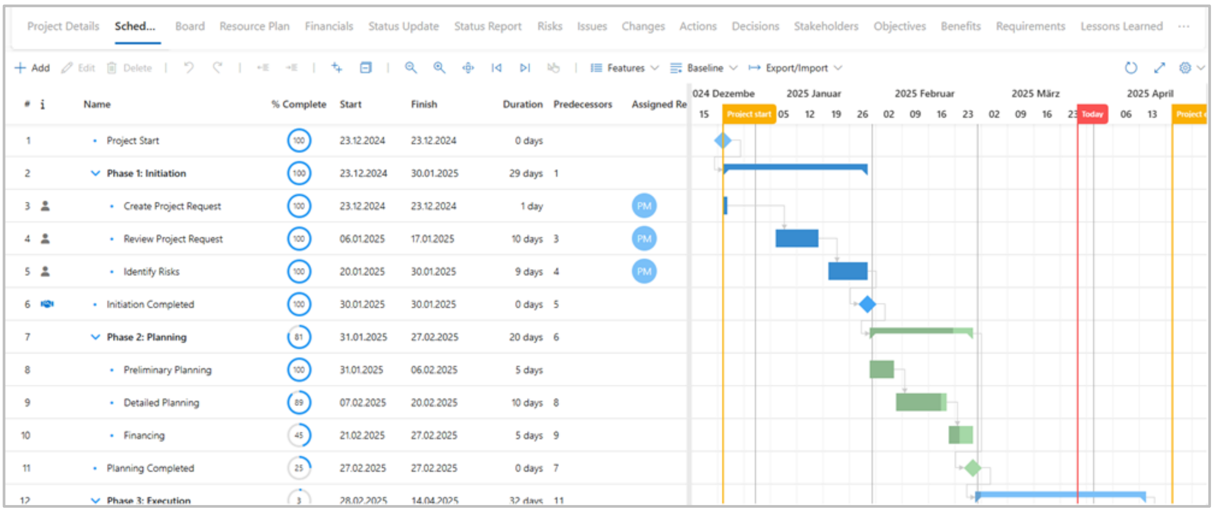
▶ The project is saved as a template.

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:

5.1 Schedule - Views

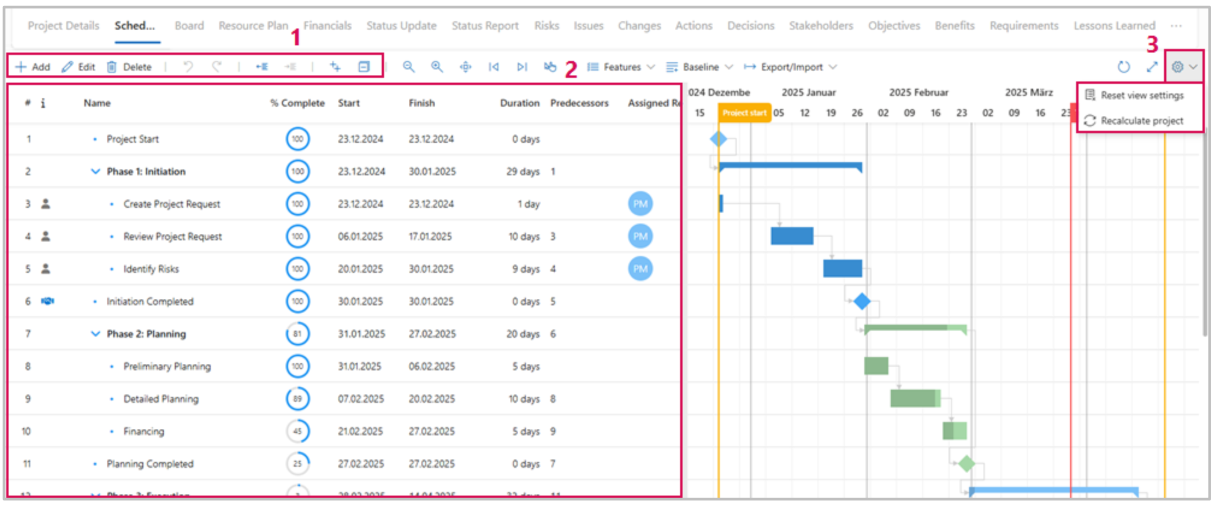
Task planning and resource allocation take place on the *Schedule* tab. TPG Scheduler provides a tabular (left) and graphical (right) overview of the project:



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

Tabular view and functions:

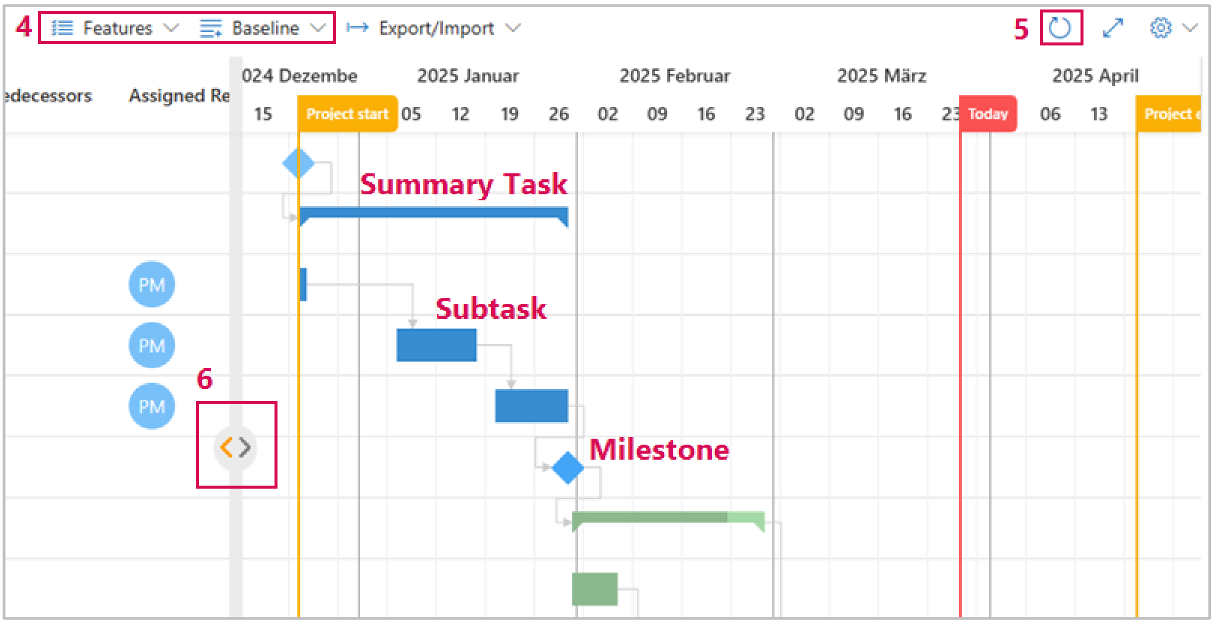
- Buttons for adding, editing, hiding and displaying tasks (1)
- Listing, properties and editing of tasks (2)
- Restoration of the standard display and immediate recalculation of the project (3)



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.

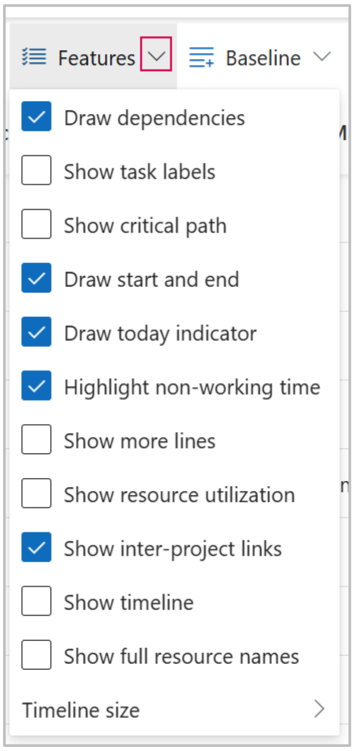


5.1.1 Schedule - Buttons

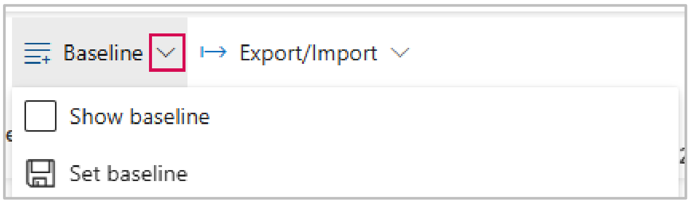
Above the tabular and graphical view of the tasks is a command line with buttons that you can use to customize the view.

- *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 46)
- *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.

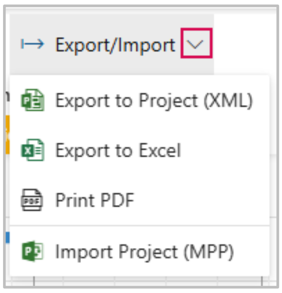


  - Click on *Show baseline*. ▶The baseline is displayed in the Gantt chart.

  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 56.

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

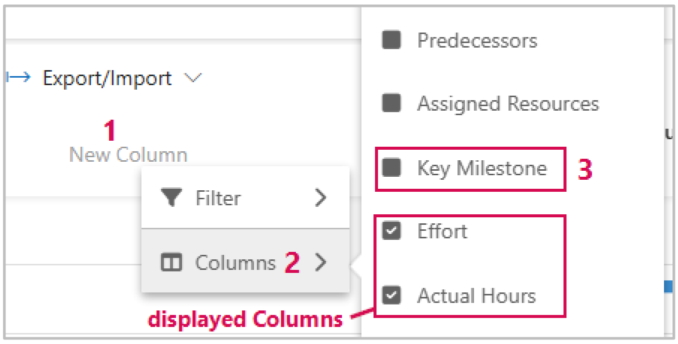
Display multiple columns:

➢ 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.

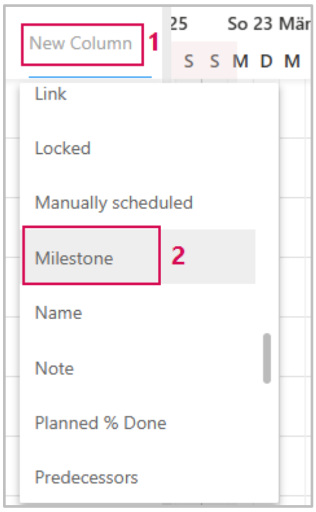


Or

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.

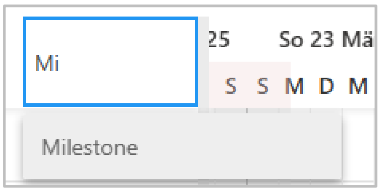


Or

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.



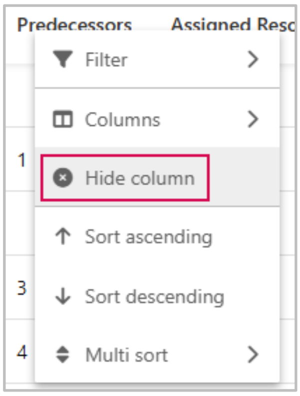
▶ It may happen that not all columns are available for selection when you try to show columns. This depends on the configuration of the TPG Scheduler. If you cannot find the desired column, try another method to show columns.

Hide columns:

➢ Right-click on the column to be hidden. ▶ The drop-down menu opens.

➢ Click on *Hide column*.

▶ The column is hidden.

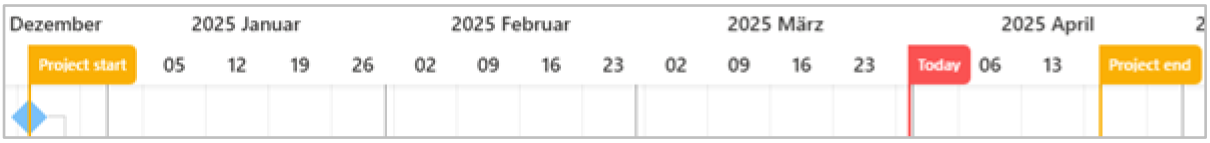


▶ Columns that you hide may no longer be displayed in the drop-down menu if you want to show them again. Reload the project. The column will then be displayed in the drop-down menu again.

5.1.3 Schedule - Gantt Chart

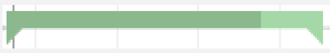
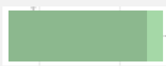
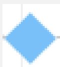
In the view on the right-hand side, the processes are displayed graphically in the form of a Gantt chart.

By default, the *Project start* date, *Today*'s date and the *Project end* date are marked on the timeline in the Gantt chart.



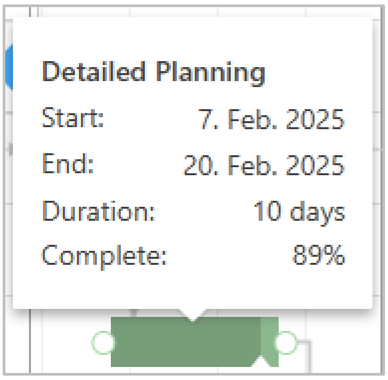
▶ The project tasks are placed one below the other on the timeline. (see Scheduler - Views 34)

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) 49

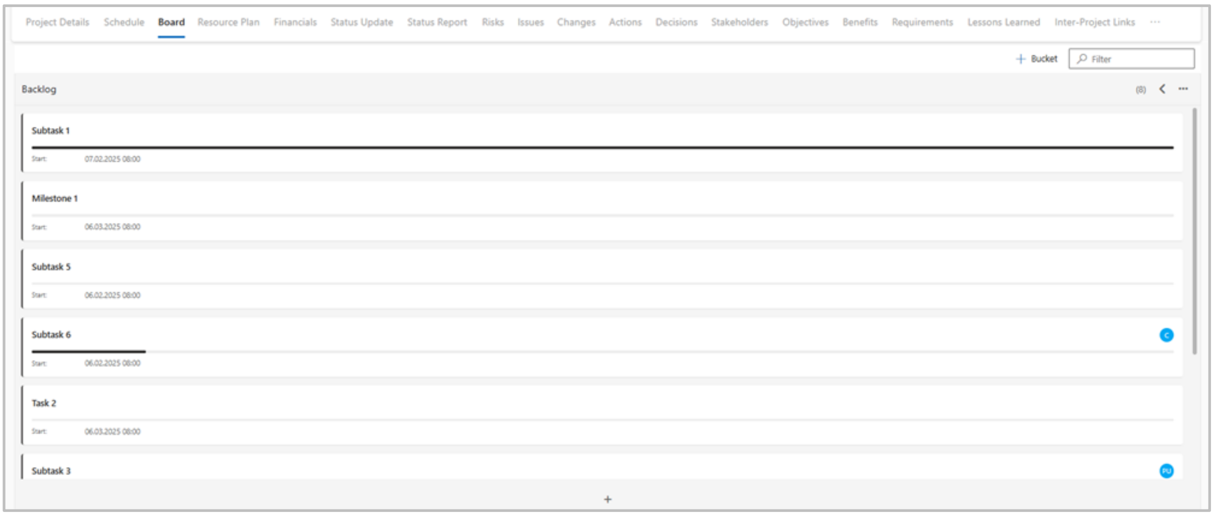
Move the mouse pointer over an operation to obtain information about it:



5.1.4 Board Tab

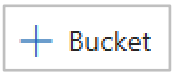
A Kanban board is integrated on the *Board* tab to display the tasks of a project. This Kanban board offers the option of dividing tasks into groups - the buckets - and organizing them.

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

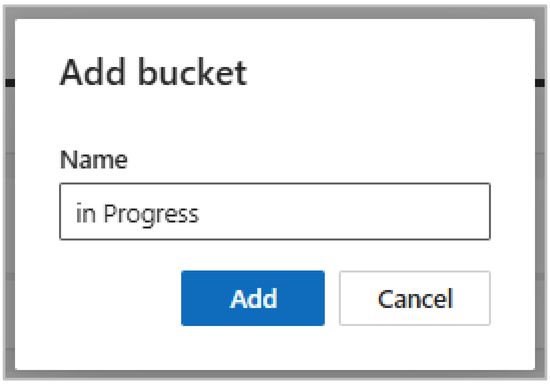


Create Bucket:

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



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



▶ 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.

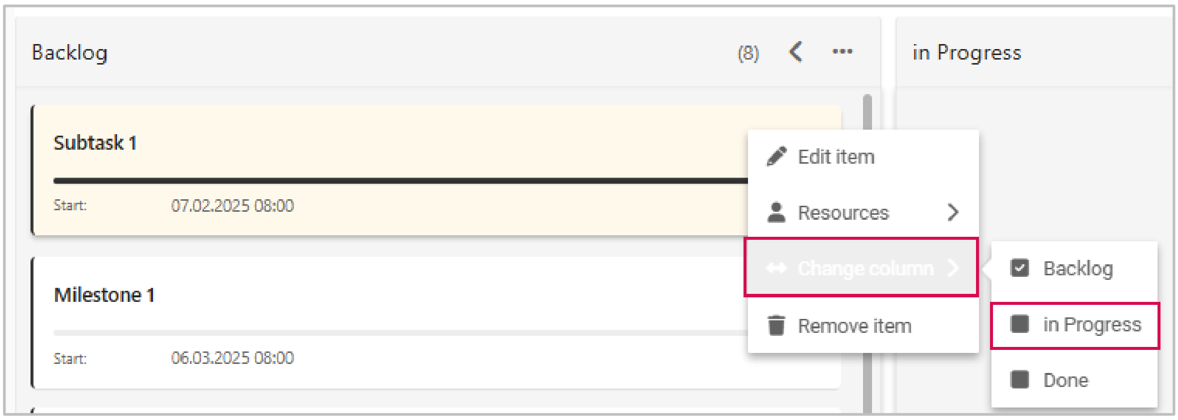
Or

➢ 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.

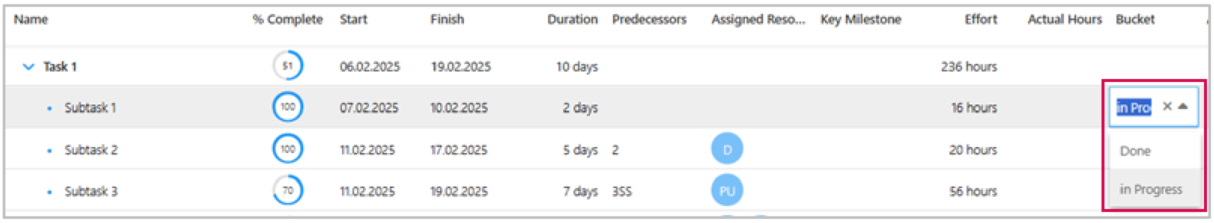
⚠ **Warning:** All functions affect the schedule. Deleting a task not only removes it from the bucket, but also from the schedule.

- *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 158.

Show bucket in the schedule:

You can show the *Bucket* column in the *Schedule* (see Task Attributes 56). 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.



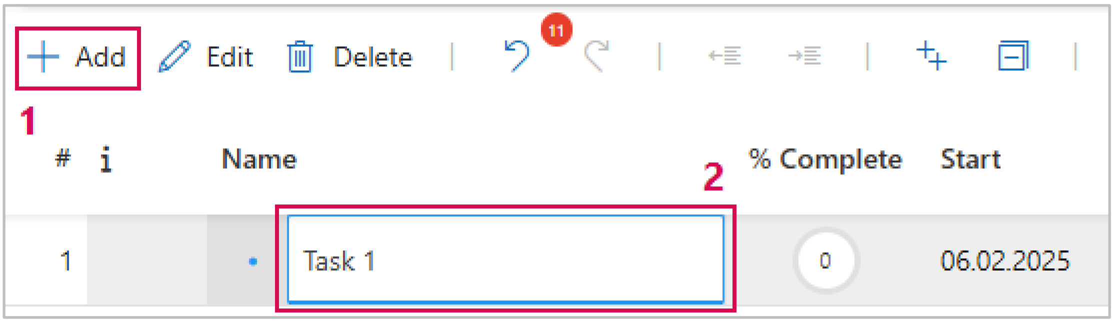
5.2 Create Task

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:

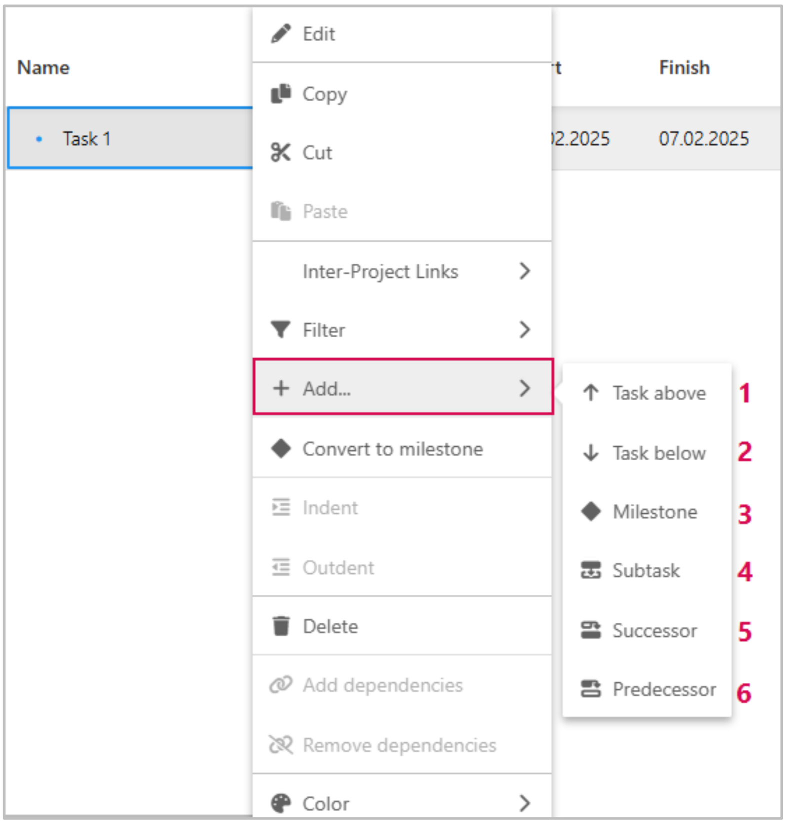
Repeat the process described above to create a task on the same level.

- 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.

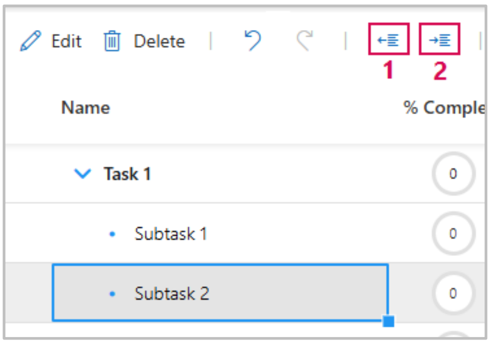
Move task to another level:

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

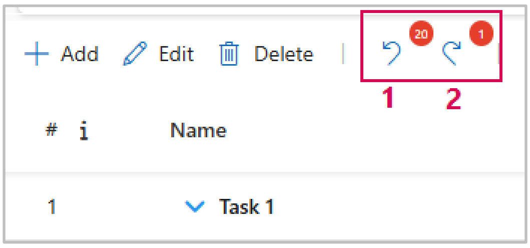
Last actions can be undone and redone using the buttons with the curved arrows.

Undo action:

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

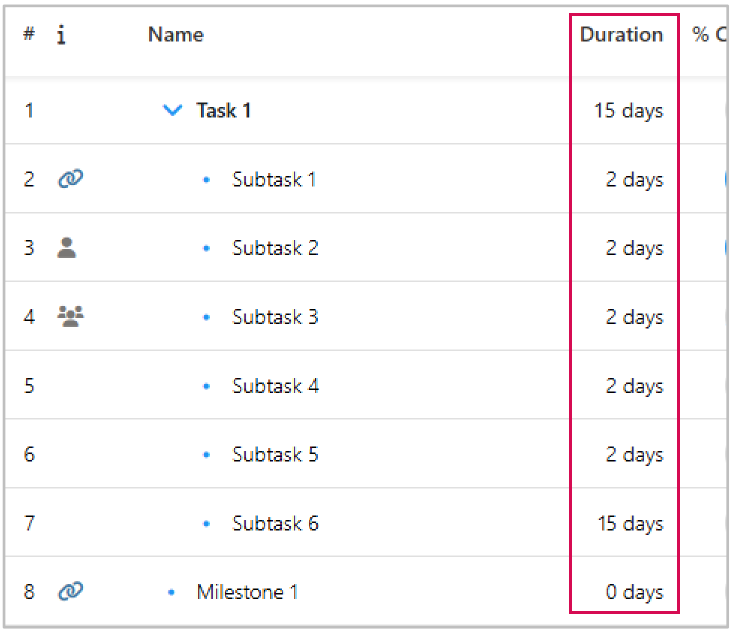
Redo action:

➢ 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 49).

▶ 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

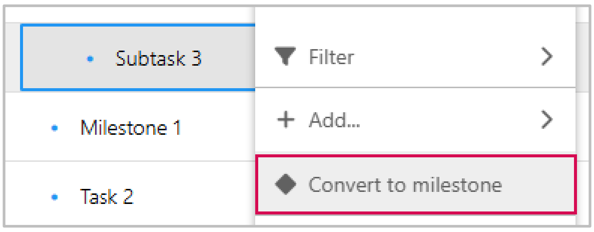
You can convert an task into a milestone.

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

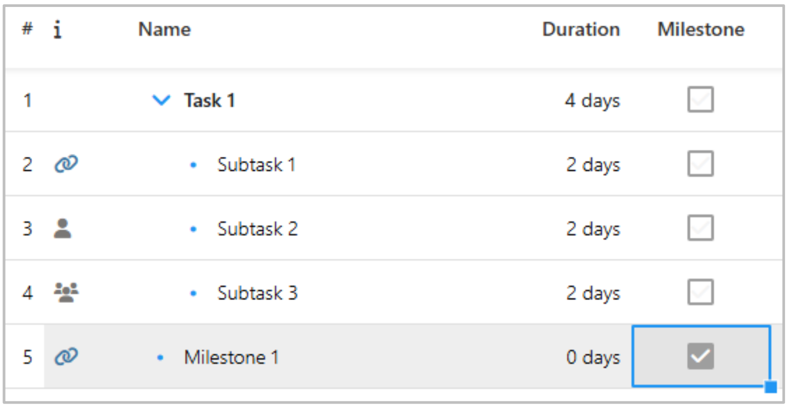
1. In the *Duration* column, set the duration to 0.

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.

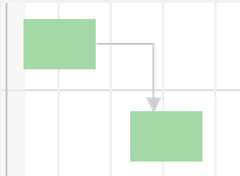
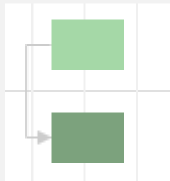
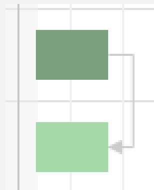
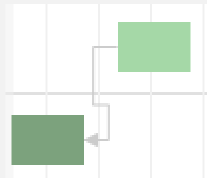


3. Show the *Milestone* column (see Schedule - Table 38) and activate the checkbox.



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).	

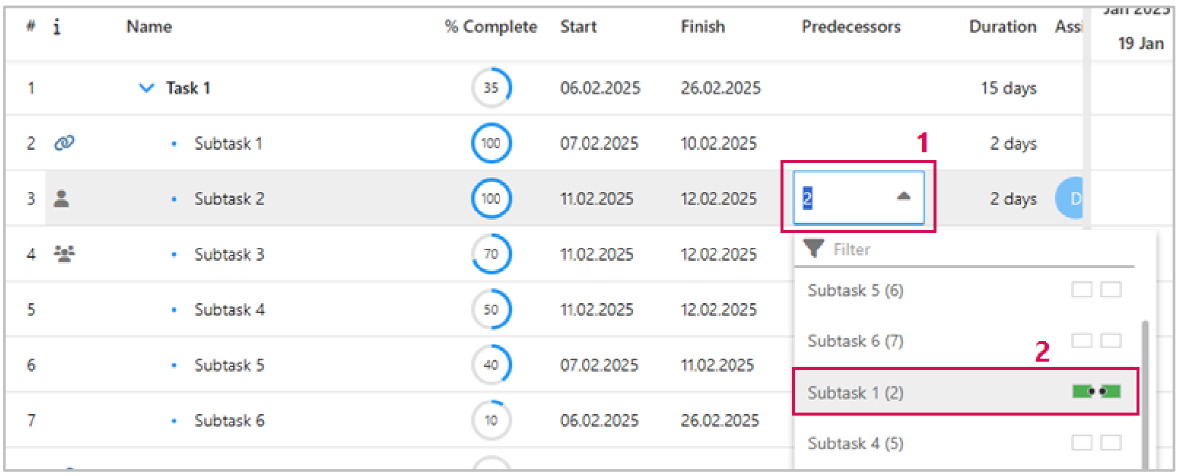
5.7.1 Define dependencies between Tasks - Table

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

FS relationship:

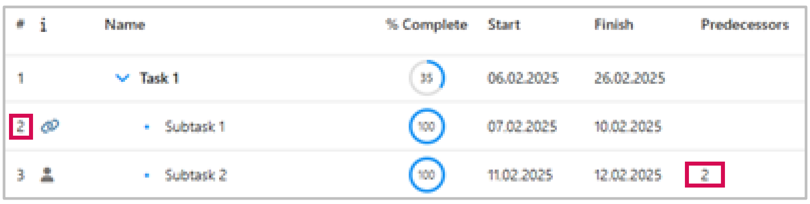
- ➢ Select the task to which you want to assign a predecessor (e.g. Subtask 2).
- ➢ Double-click in the cell in the *Predecessor* column. (1)
- ➢ Click on the down arrow. ▶ The drop-down menu opens.
- ➢ In the drop-down menu, click on the task that you want to define as the predecessor (e.g. Subtask 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.



Or

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



Define SS, FF and SF relationship:

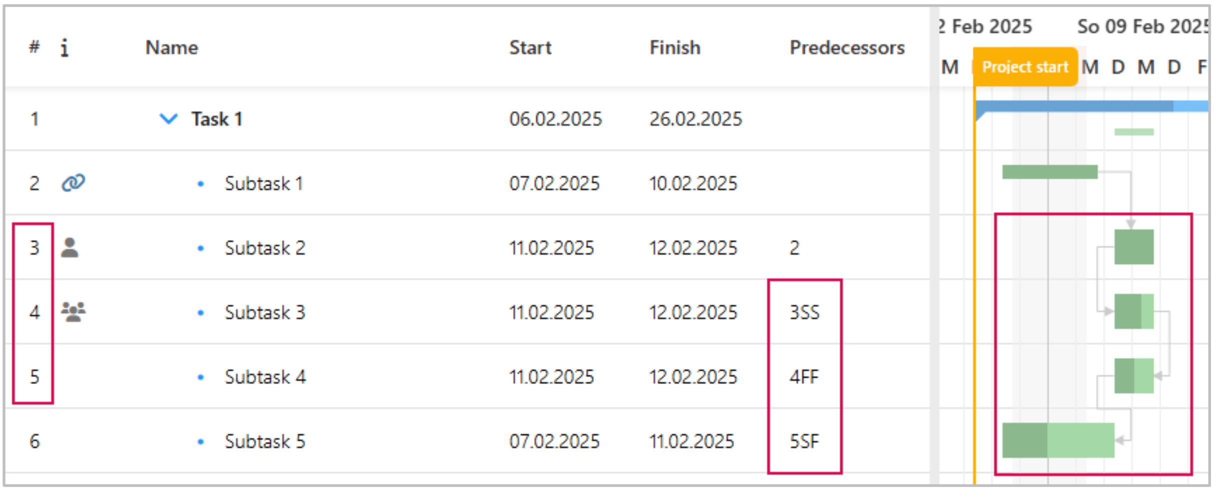
To define the other dependencies, proceed as follows:

➢ 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

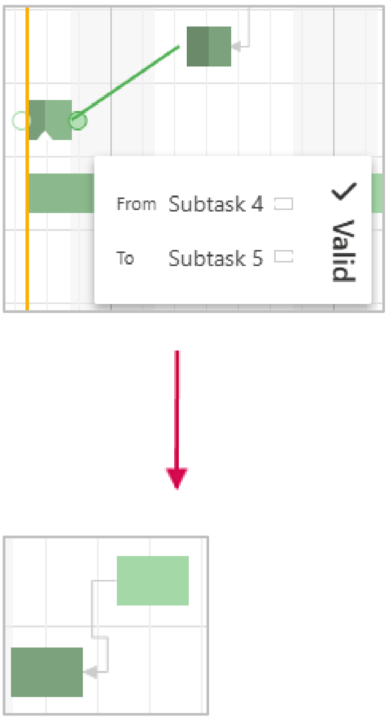
You can define dependencies between tasks in the Gantt chart view.

➢ 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 Task information window, you can change the dependency types and insert a lag between two tasks.

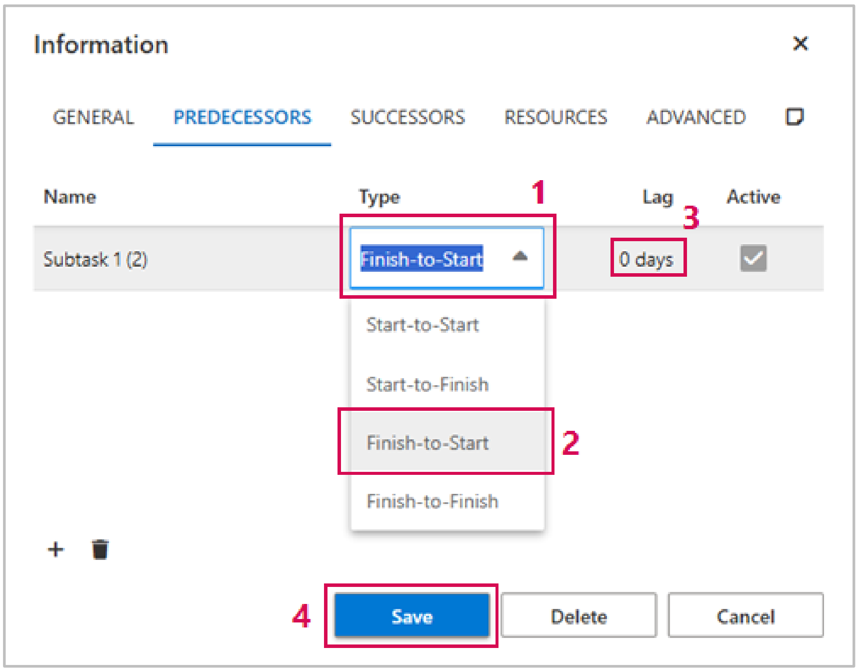
There are 2 ways to open the *Task information* window.

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

Or:

- ➢ Double-click on the task bar in the Gantt chart. ▶ The *Task 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.

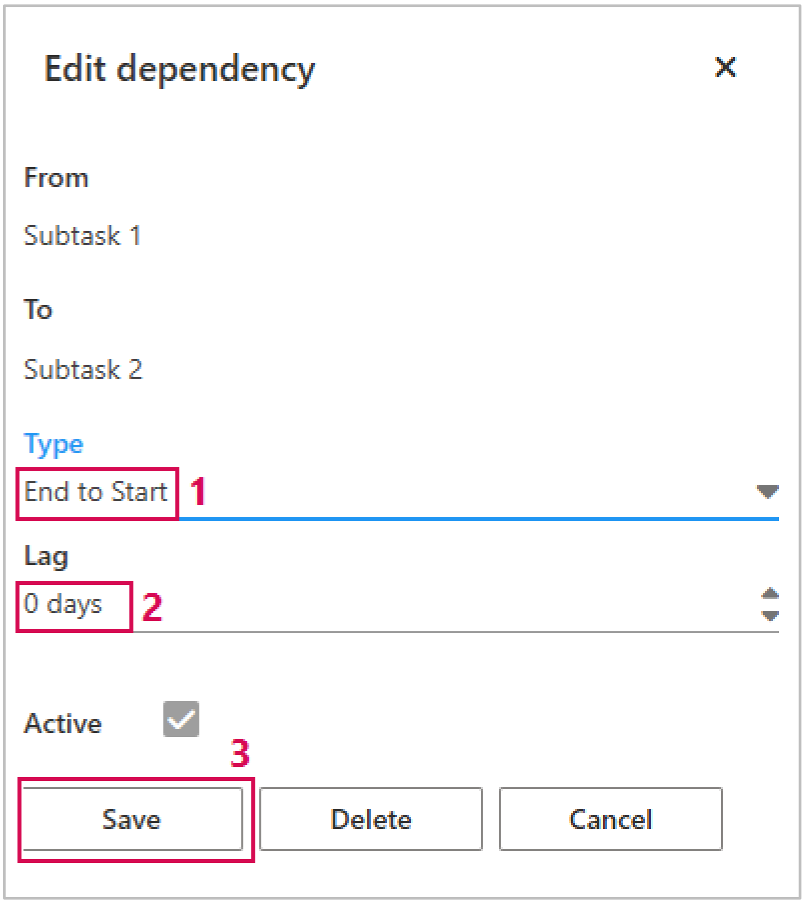
➢ Click on the desired dependency.

➢ 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.



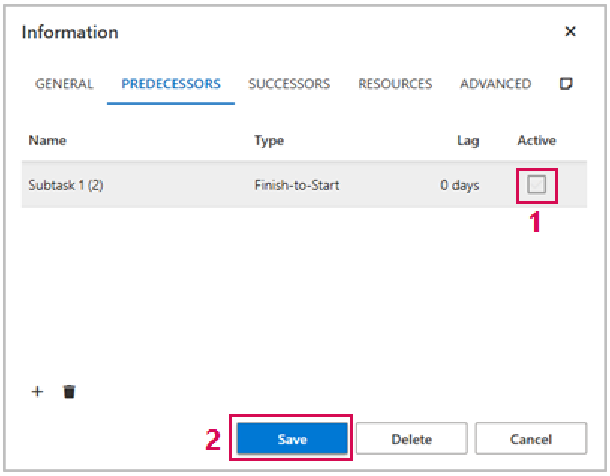
5.7.4 Deactivate dependencies between Tasks

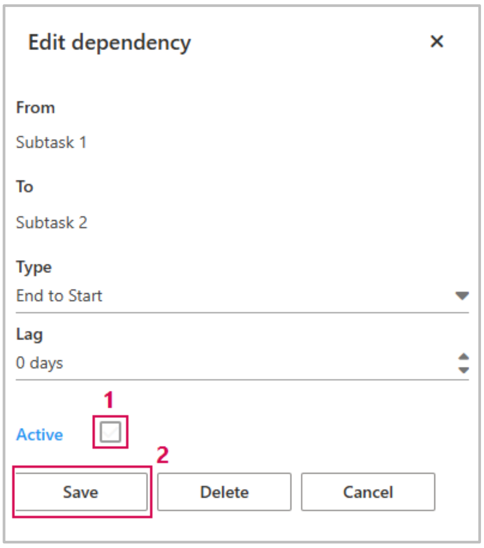
To deactivate a dependency between two tasks without deleting the dependency, proceed as follows:

- Open the information window of one of the two tasks. (see Define dependencies between operations - Information Window 53)
- 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)



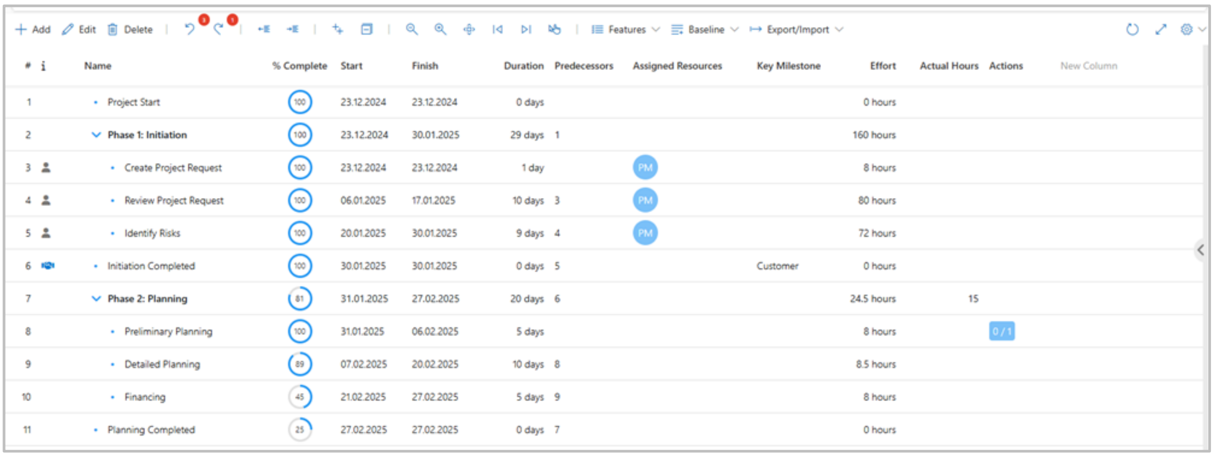


5.8 Task Attributes

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:

- *#* (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 45 . (see Progress Indicator 71)
- *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 47)
- *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 81)
- *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)



#	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			

Further columns or task attributes:

Columns	Description
Start Variance	Difference between the planned and the actual start date of the task. Positive variance = task starts later than planned Negative variance = task starts earlier than planned
Finish Variance	Difference between the planned and the actual end date of the task. Positive variance = task ends later than planned Negative variance = task ends earlier than planned
Bucket	Group in which tasks can be collected and organized on the *Board* Tab. (see Board Tab 42)
Duration Variance	Difference between the planned and actual duration of a task. Positive variance = actual duration is longer than planned duration

Columns	Description
	Negative variance = actual duration is shorter than planned duration
Effort Unit	Unit in which the effort for the task is specified e.g. hour.
Constraint Type	Assign a constraint to the task: *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*
Constraint Date	Assign the date (day) for the constraint type to the task.
Color	Color of the task bar
Early Start	The earliest date on which a task is allowed to start.
Early End	The earliest date on which a task is allowed to finish.
Baseline Duration	Planned total time required to complete the task, specified in days.
Baseline Start	Scheduled time at which the task starts.
Baseline Finish	Scheduled time at which the task ends.
Total Slack	Total period provided as a buffer.
Locked	Task cannot be edited or moved.
Inactive	Task is deactivated (see Deactivate Task 70)
Calender	Assign task to a calendar. (see Set Calender for a Task 67)
Link	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.
Manually scheduled	Plan the task manually. The start date, finish date and duration are set by the project manager.
Milestone	Event in the project e.g. completion of a project phase.
Successor	Task that follows the current task. The cell contains the number of the operation line of the successor.
Note	Comments on the task (see Add Note 72)
WBS	Work Breakdown Structure, hierarchical representation of all content levels of a project.
Scheduling Mode	Mode for scheduling tasks within a project. There are three scheduling modes: *Fixed Duration*, *Fixed Effort*, *Fixed Units*. (see Define Scheduling Mode 63)
Scheduling Direction	Method used to structure the scheduling of a project: *Forward* or *Backward*
Priority	Importance and urgency of a task: *Urgent, High, Medium, Low*
Ignore Resource Calendar	The calendar of the assigned resource is not considered when scheduling a task.
Rollup	Display subtasks and milestones in the Gantt chart directly under the bar of the higher-level summary task. (see Create Rollup 68)
Sequence	The order in which tasks are performed.
Deadline	Time (date) by which the task/milestone must be completed.
Late Start	Latest time (date) at which a task may start.

Columns	Description
Late End	Latest time (date) at which a task may end.
Todos	Jobs that need to be completed within the task.
Show in timeline	The task is displayed in the timeline above the table and the Gantt chart. Timeline must be shown. (see Schedule - Buttons 36)

▶ 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 38)

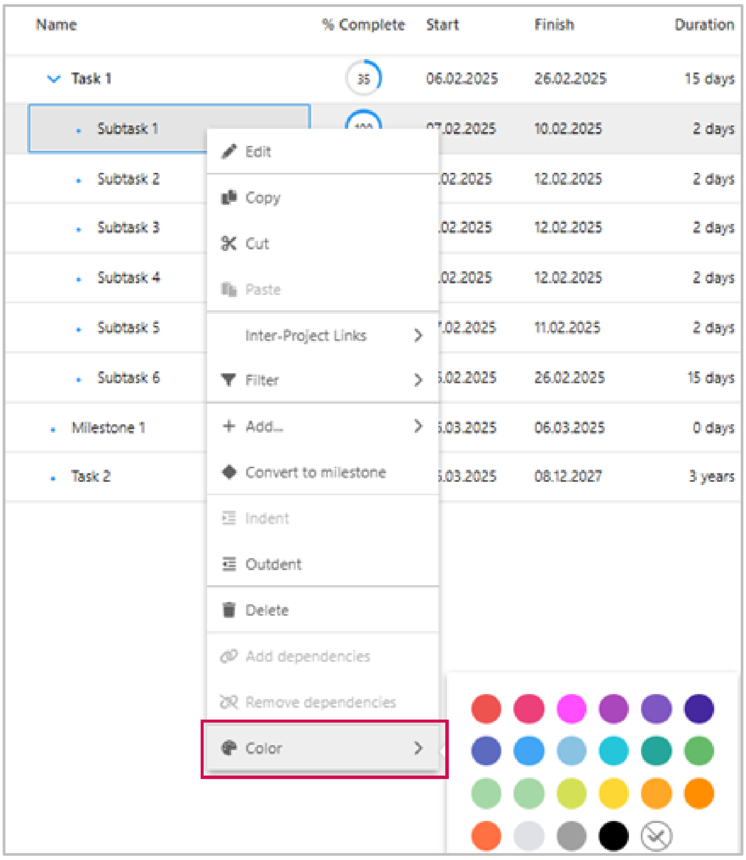
➢ Fill in the cells as described in the following chapters.

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.

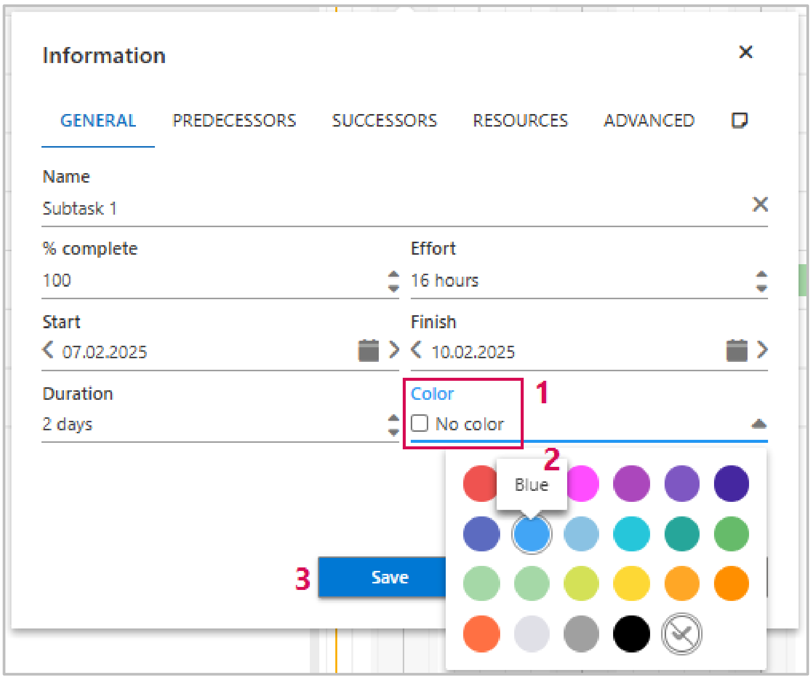
▶ The color of the task is changed.

Or

- Open the information window of the task. (see Define dependencies between tasks - Information Window 53)
- Click on the *Color* field. (1) ▶ The color palette opens.

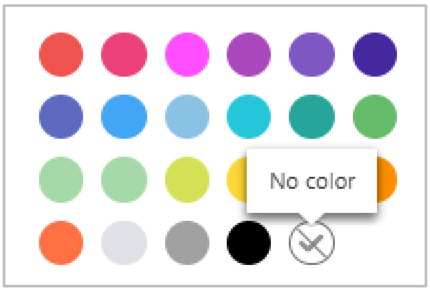
➢ Click on the desired color in the color palette. (2)

➢ 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 38)

➤ 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 you want to use the *Fixed Effort* scheduling mode for a task, you must first enter the desired effort and only then assign the resource. If the resource is assigned beforehand, the effort is automatically set to 8 hours.

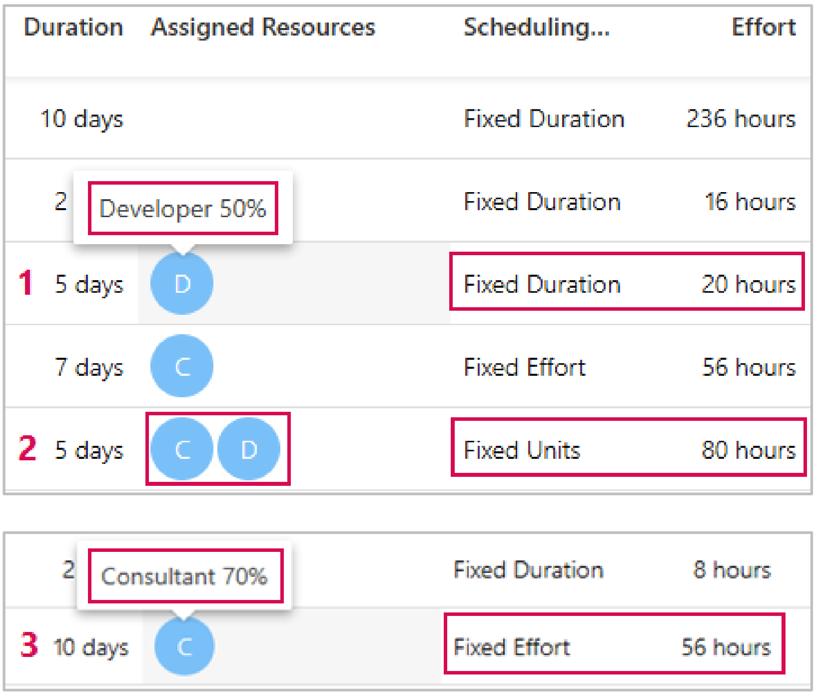
If a scheduling mode (e.g. Fixed Duration) is selected, the other variable (e.g. Units) is recalculated when one variable (e.g. Effort) is changed. The variables are related as follows:

Change of ... / Scheduling Mode	Number of Assigned Resources	Duration	Effort
	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%).

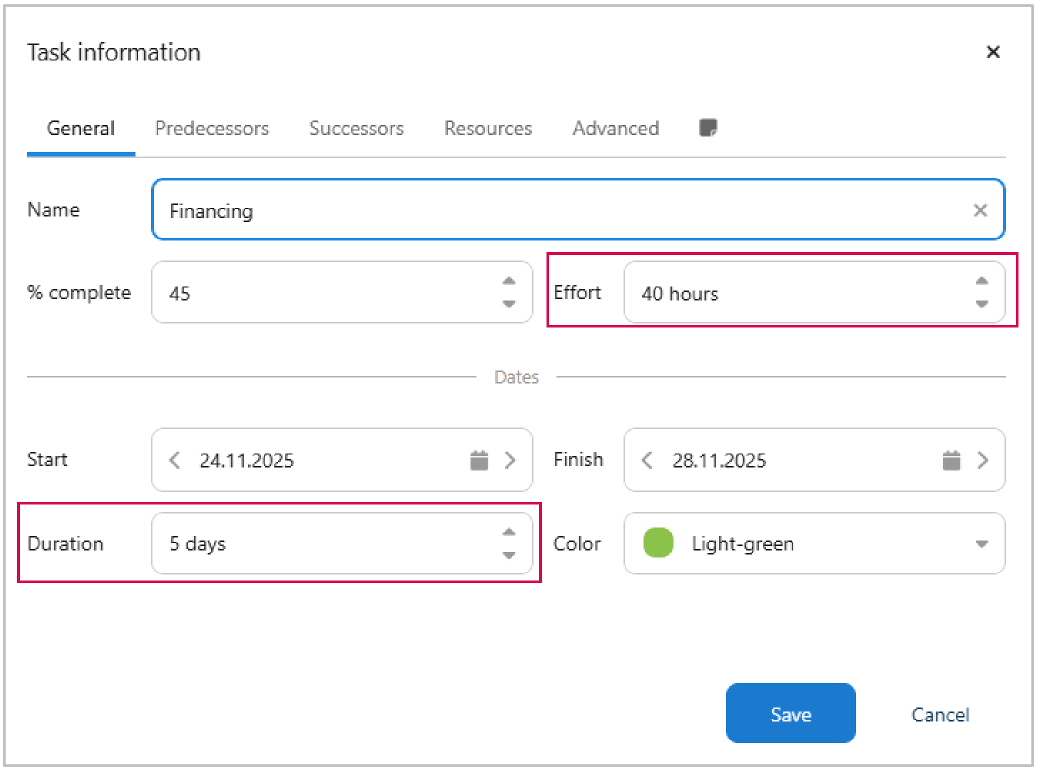


Edit variables in the Task information window:

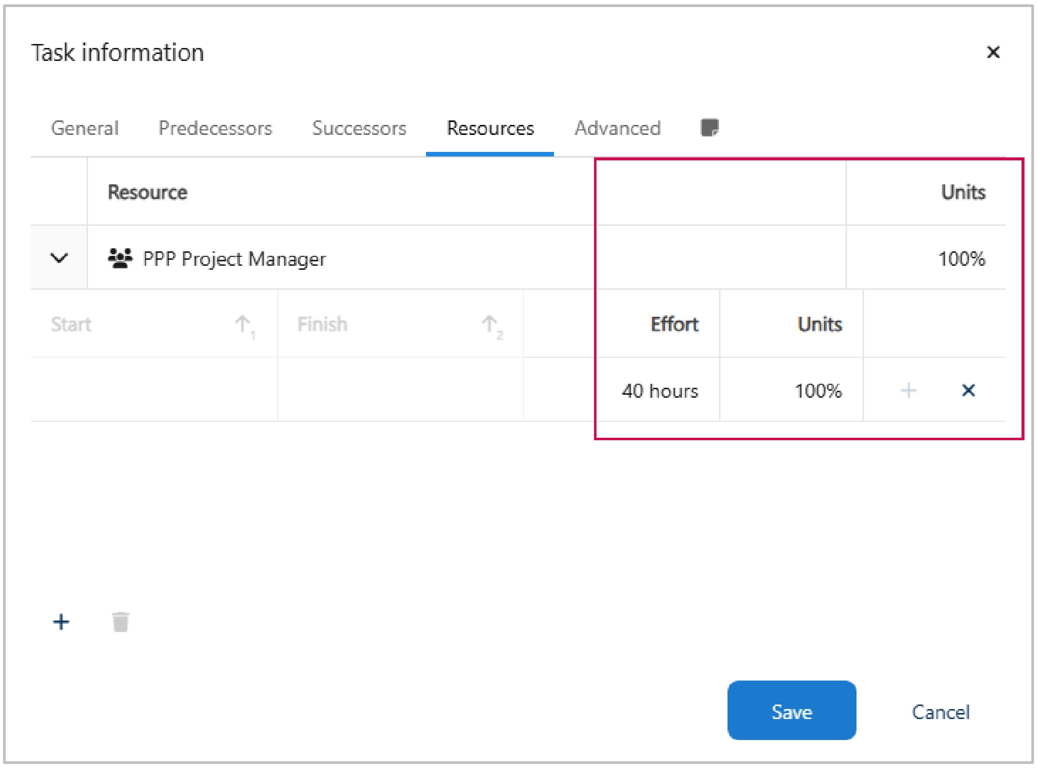
➢ Open the information window. (see Define dependencies between Tasks - Information window 53)

The following tabs are available in the Task information window:

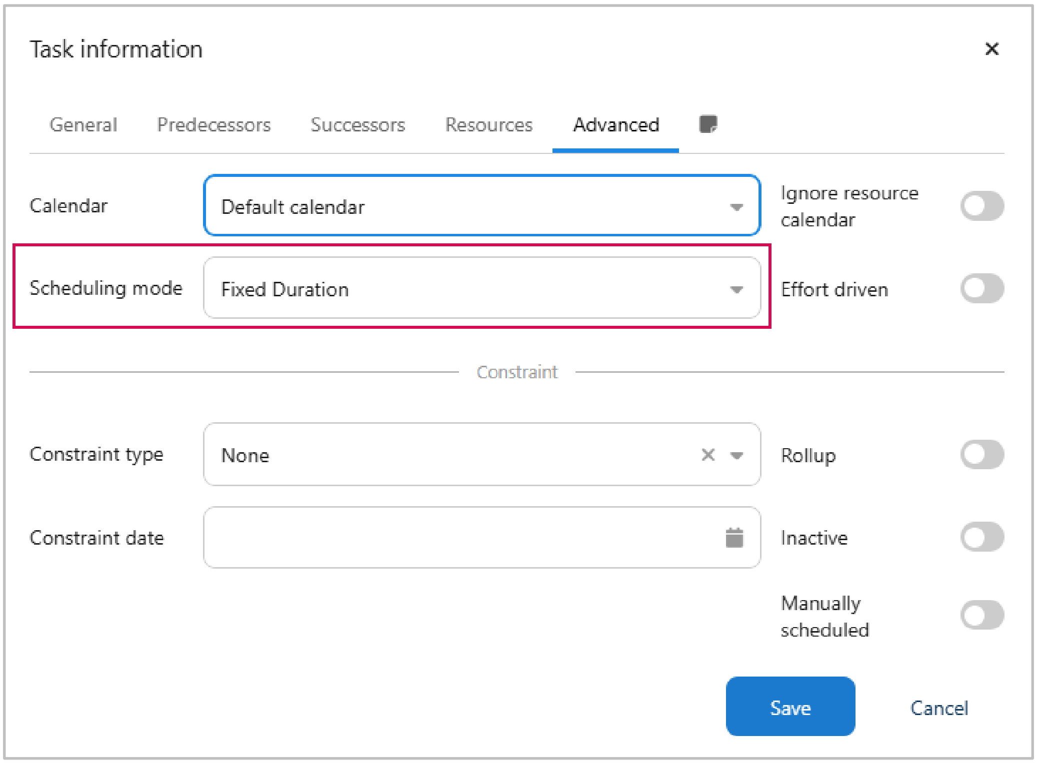
➢ **General:** Here you can adjust the effort and duration of the task.



➢ **Resources:** Here you can add or remove resources and change the unit and effort of the resources.



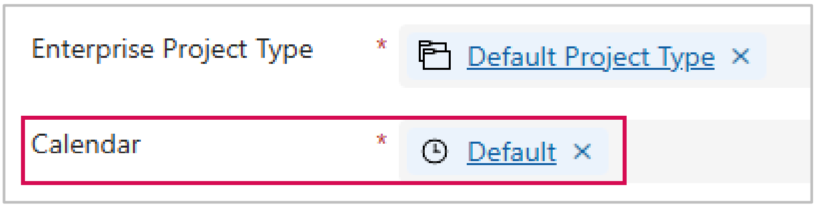
- **Advanced:** Here you can set the scheduling mode for the task.



- Click *Save*.

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 27)



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:

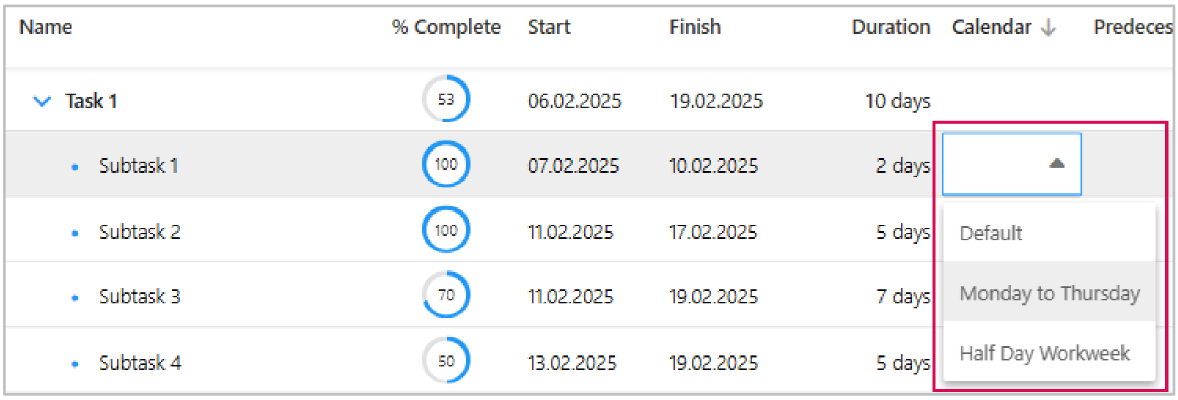
➢ Show the *Calendar* column. (see Schedule - Table 38)

➢ 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.



▶ 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.

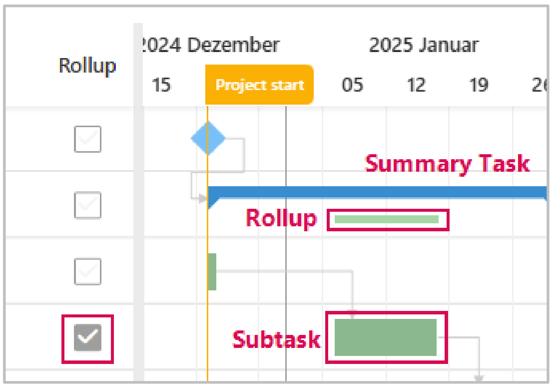
5.8.4 Create Rollup

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 38) ▶ Checkboxes appear in the task rows.

➢ Click on the checkbox of the subtask in the *Rollup* column.

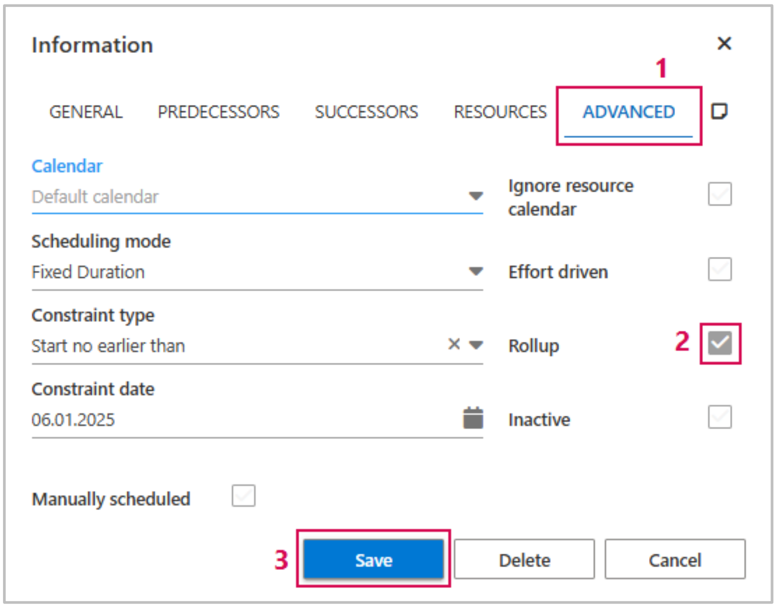
▶ The subtask appears directly below the parent task in the Gantt chart.



Or

- ➢ Open the information Window of the task. (see Define dependencies between Tasks - Information Window 53)
- ➢ 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.



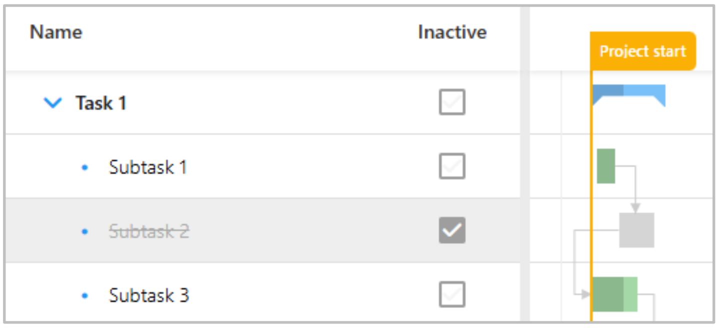
5.8.5 Deactivate Task

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

➢ Show the *Inactive* column. (see Schedule - Table 38) ⇒ 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.



Or

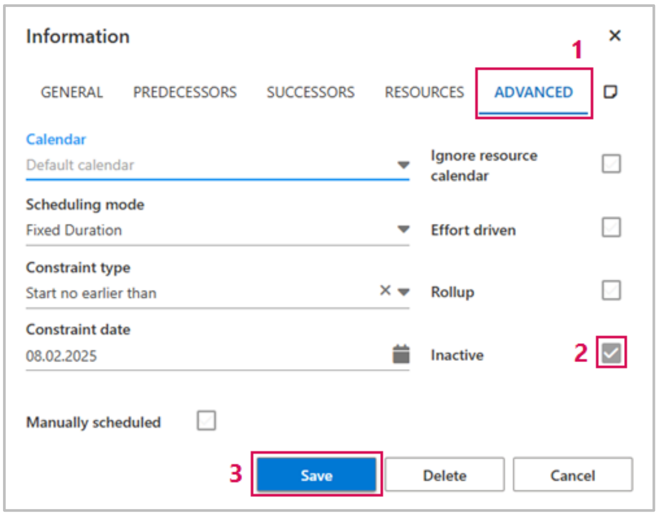
➢ Open the information window of the task. (see Define dependencies between Tasks - Information Window 53)

➢ 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.



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.

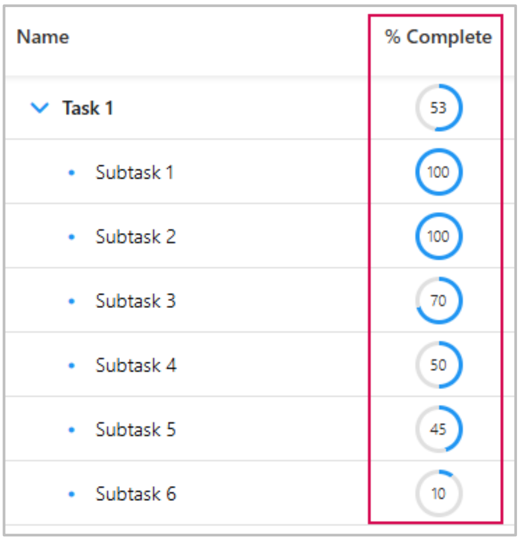
➤ Select the task to which you want to assign a progress.

➤ 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.

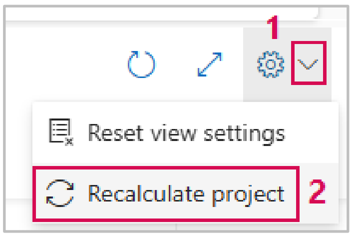


Recalculate total project progress:

➤ 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.

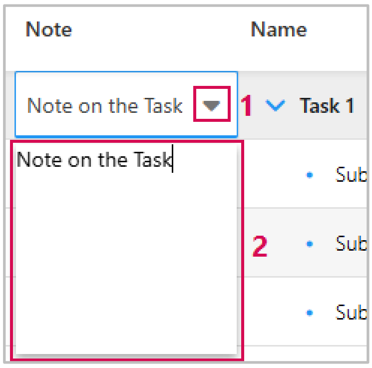


5.8.7 Add Note

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

- ➢ Show the *Note* column. (see Schedule - Table 38)
- ➢ 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.

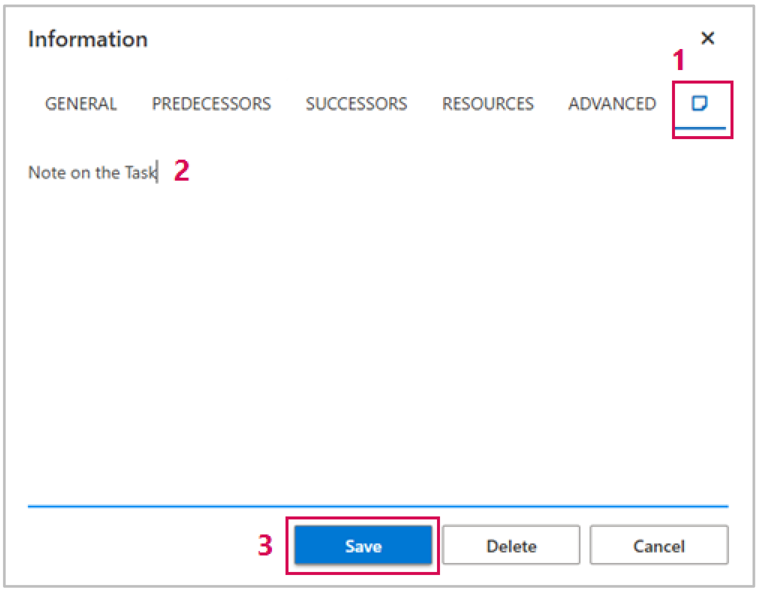
▶ The note is added.



Or

- ➢ Open the information window of the task. (see Define dependencies between Tasks - Information Window 53)
- ➢ Click on the pictogram on the right. (1)
- ➢ Enter the note in the text field. (2)
- ➢ Click on *Save*. (3)

▶ The note is added.



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.

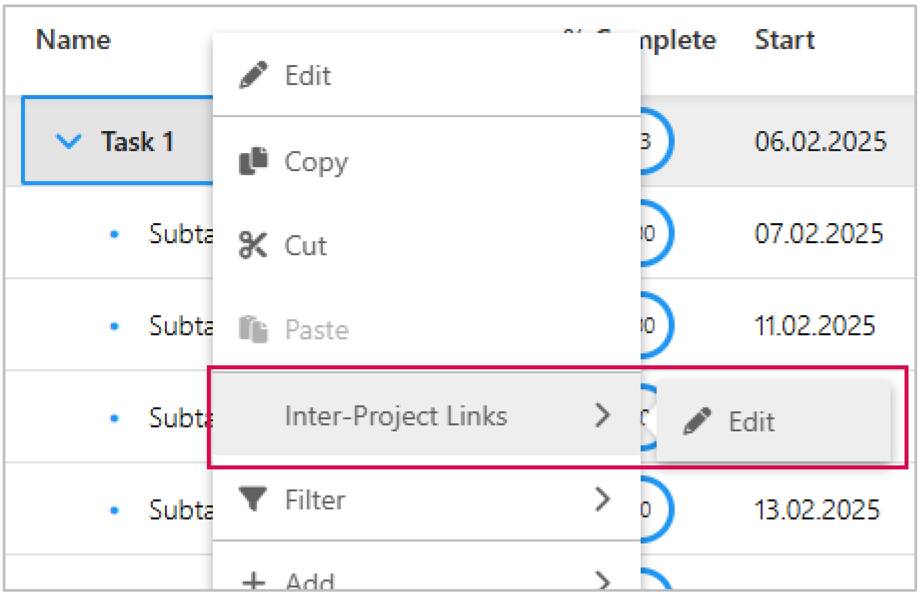
5.9.1 Create Inter-Project Links

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

➢ On the *Schedule* tab, select the task you want to link.

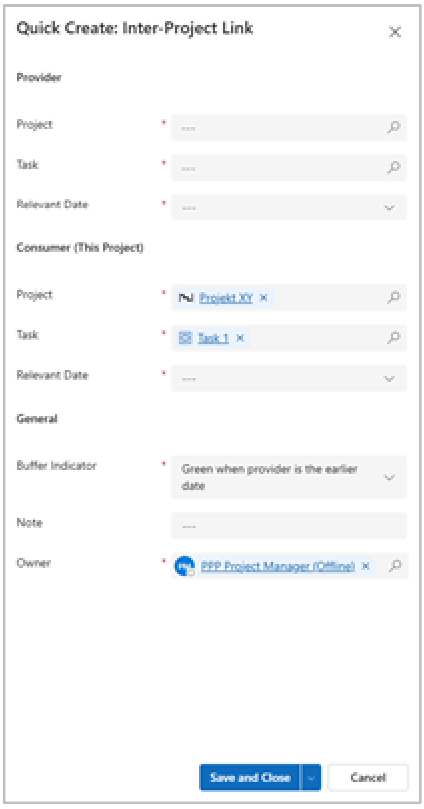
➢ Right-click on the task. ▶ The drop-down menu opens.

➢ 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.



➢ 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.

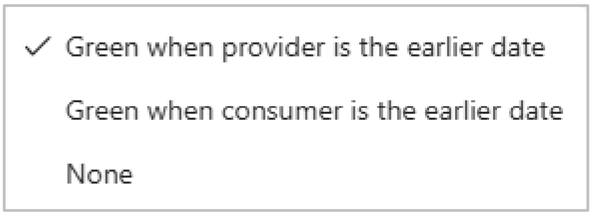
Consumer = Current project. Project that receives information from the provider project.

▶ 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.



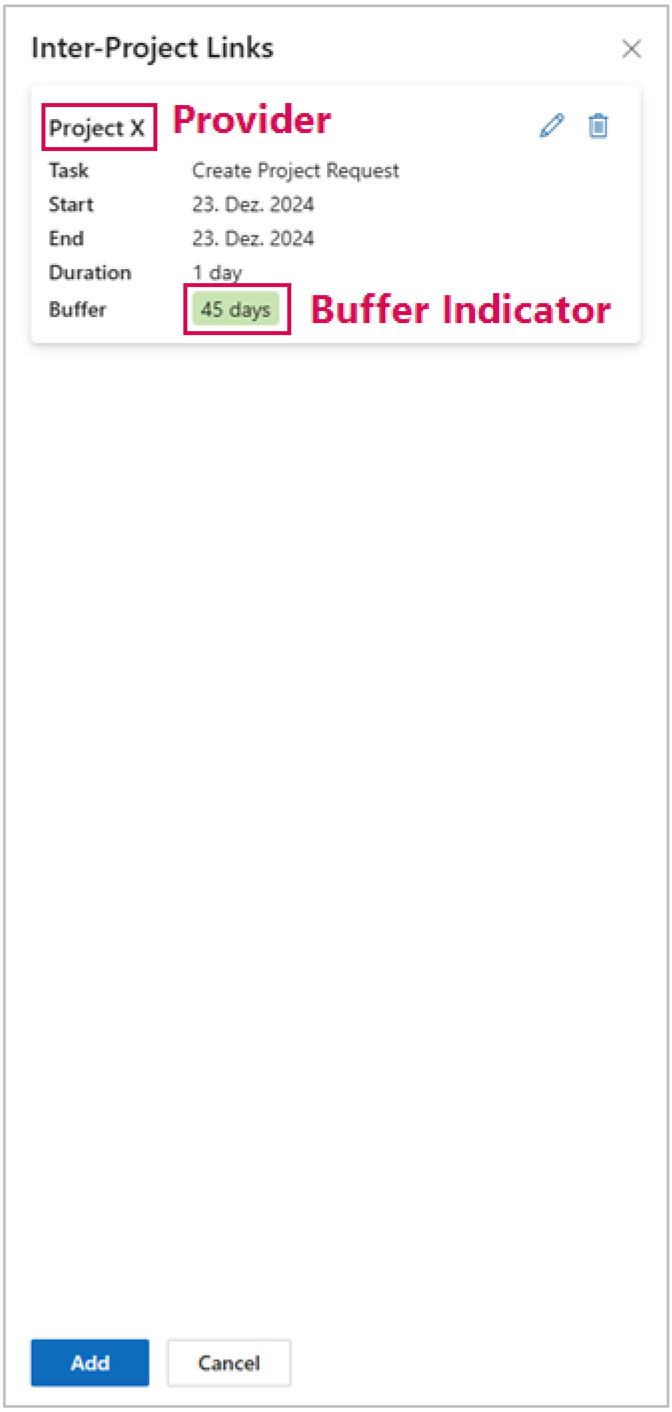
➢ Click in the *Note* field to enter a note for linking the tasks.

▶ 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.



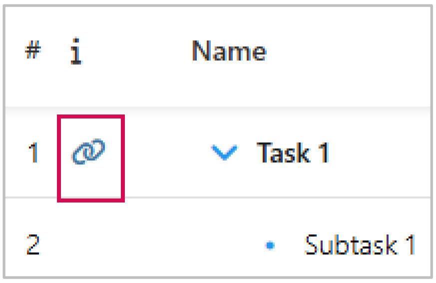
▶ The buffer is green if a buffer is available.

▶ The buffer is red if the buffer has been exceeded.

5.9.2 Edit Inter-Project Links

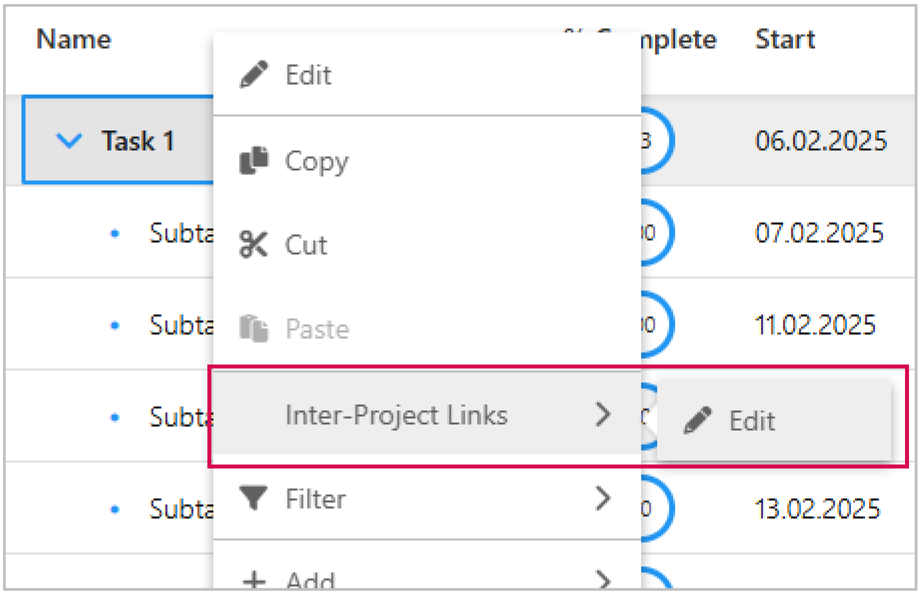
In TPG Scheduler, you can edit inter-project links on the *Schedule* tab as follows:

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



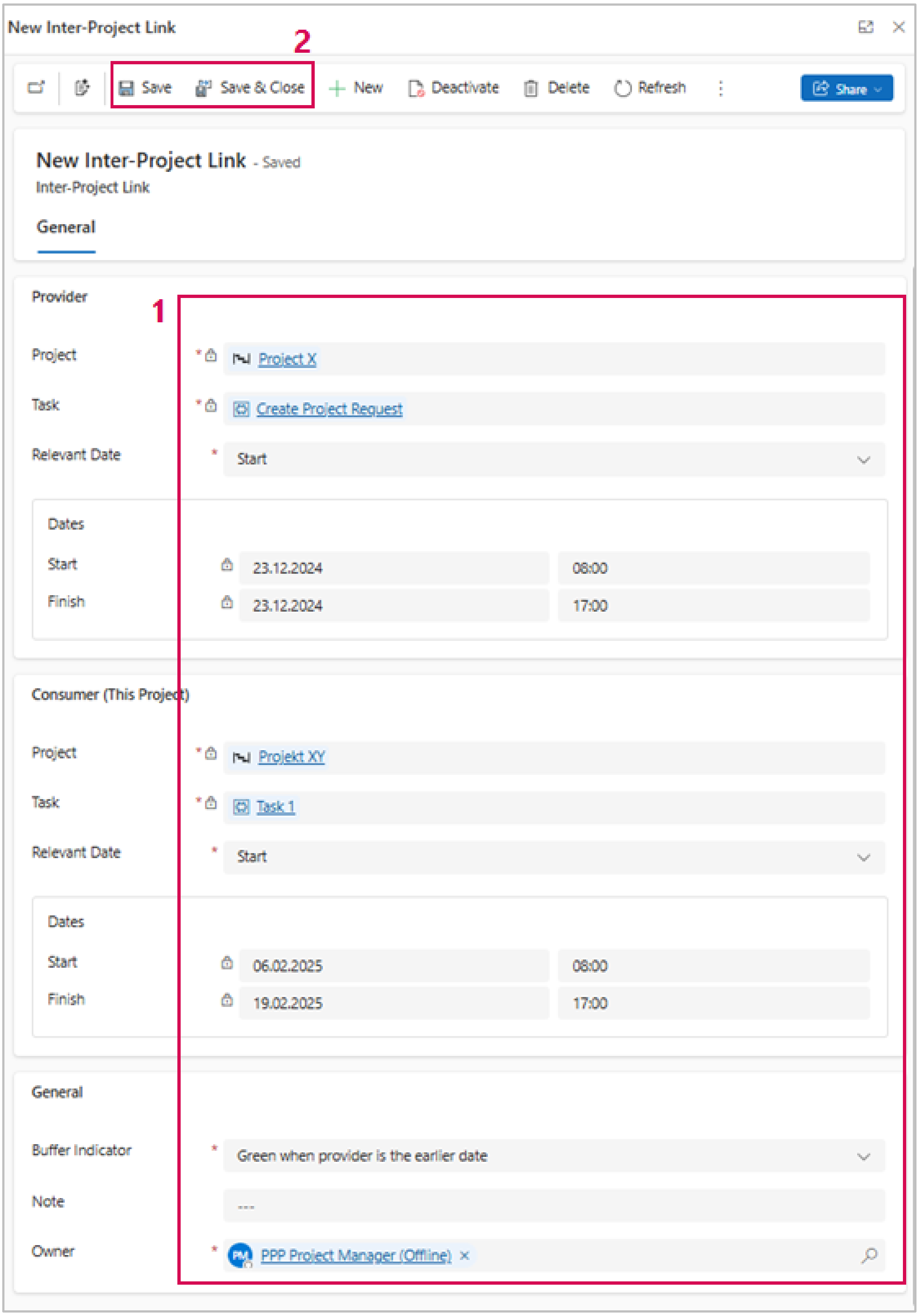
➢ Right-click on the task. ▶ The drop-down menu opens.

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

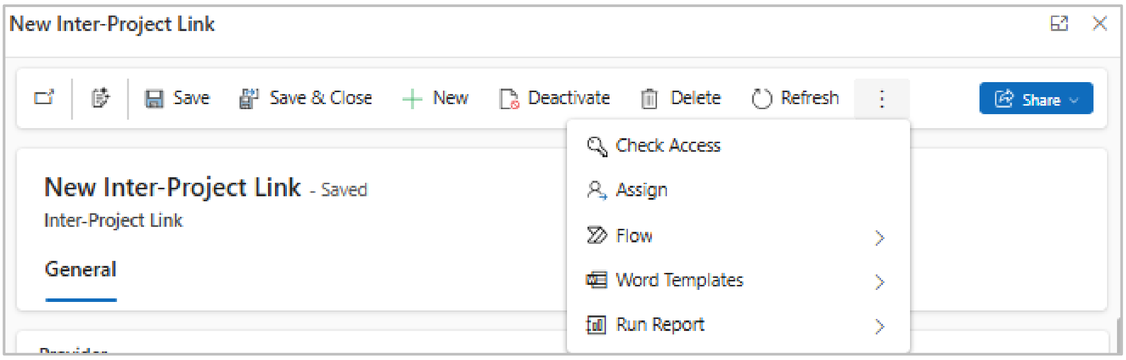


➢ Click on the edit icon. (3) ▶ A form opens.

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



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



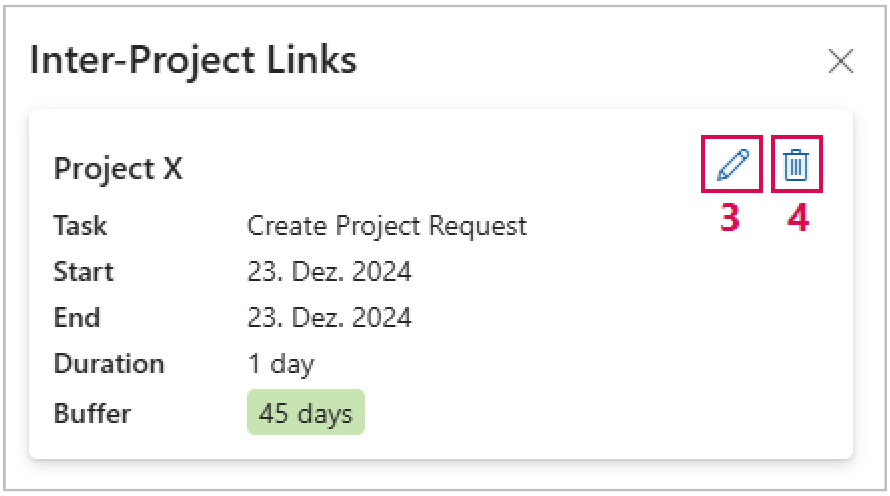
➢ Click on *Save* or *Save & Close.* (2)

➢ Close the *Inter-Project Links* window.

Delete links:

➢ Click on the delete icon. (4) ▶ A confirmation prompt appears.

➢ Click on *Delete*.

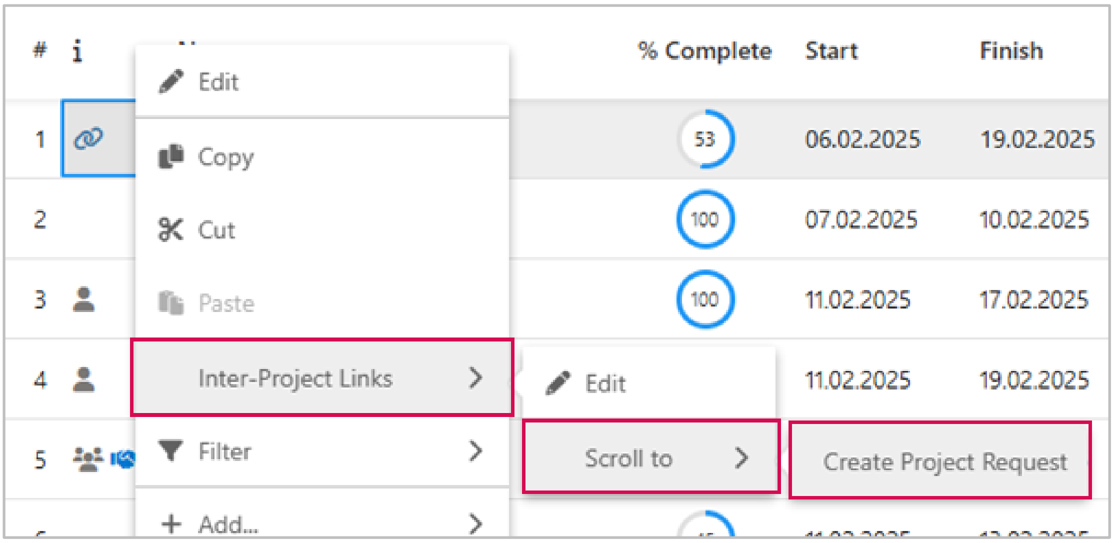


Jump to the linked task of the other project in the Gantt chart:

➢ Activate *Show Inter-Project Links* in the Gantt chart. (see Schedule - Buttons 36)

➢ Right-click on the task.

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



▶ 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.

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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. 81
  You can then transfer the data to the resource plan to check resource availability.
- Assemble the project team manually on the *Project Team* tab. 85
  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. 87
  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.

There are two views available for resource planning:

- Standard view 87: monthly view for a single year.
- Multi-year view: 95 view spanning several years.

The following section explains how to work with these views.

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)

Adjust the working time of resources:

➢ Double-click on the *Units* column to adjust the percentage of working time.

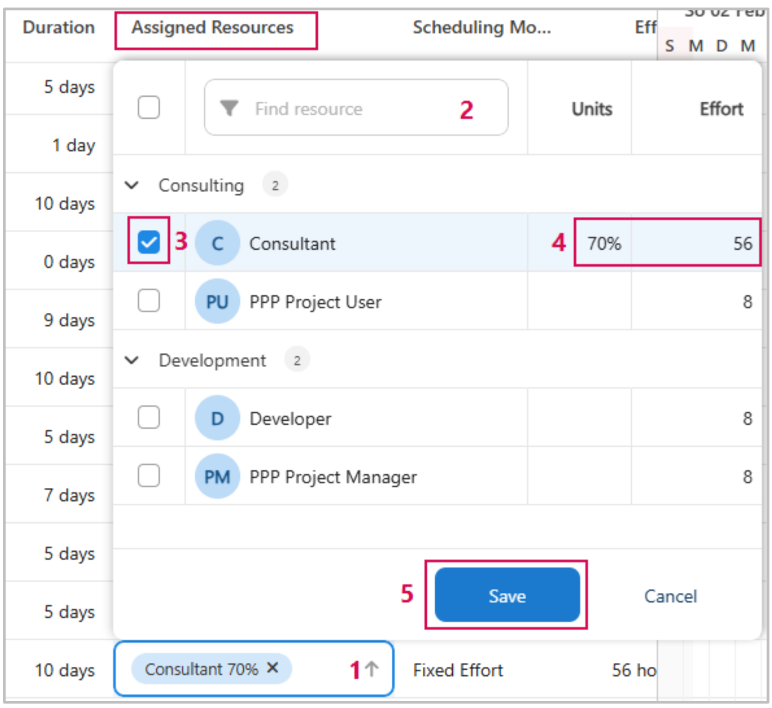
Or

➢ Double-click on the *Effort* column to adjust the number of hours.

➢ Enter the desired value. (4)

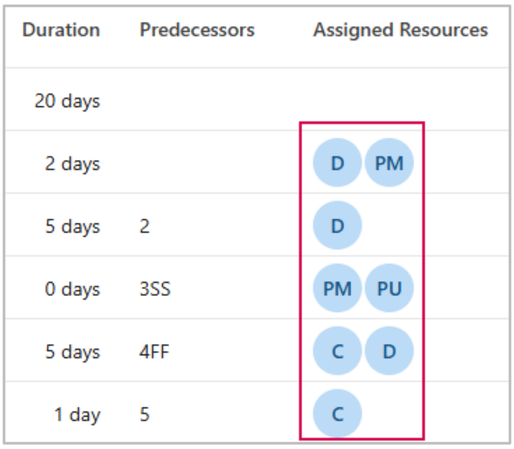
➢ Click on *Save*. (5)

▶ The resource is assigned to the task and appears in the schedule.



▶ The effects of changes to units and efforts are described under Define Scheduling Mode 63.

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

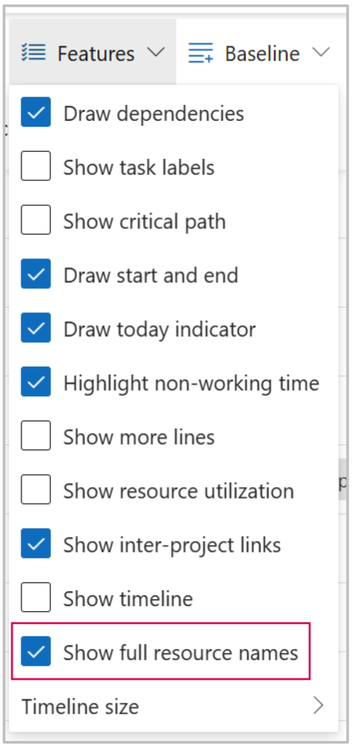


Duration	Predecessors	Assigned Resources
20 days		
2 days		D PM
5 days	2	D
0 days	3SS	PM PU
5 days	4FF	C D
1 day	5	C

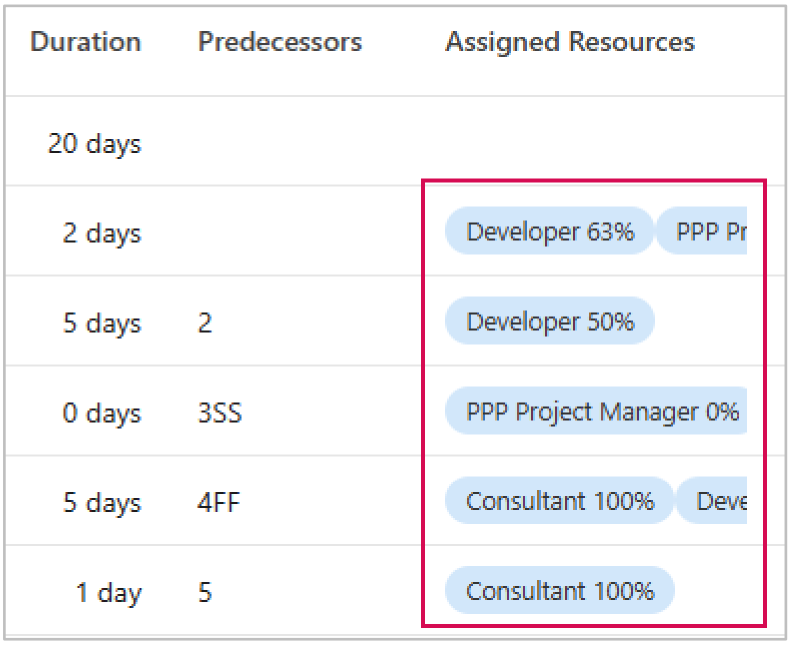
You have the option of displaying the full name of the resource in the schedule:

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

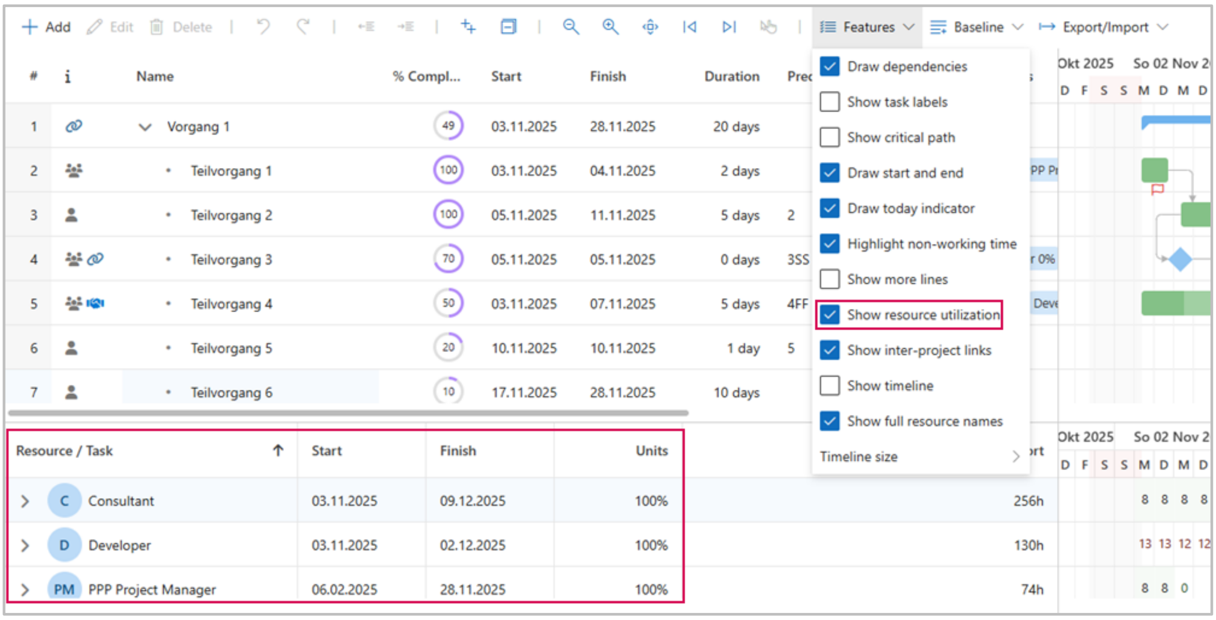
➢ Click on *Show full resource names*.



▶ The full resource name is displayed in the schedule.



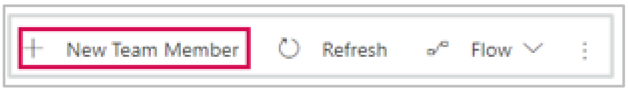
If *Show resource utilization* is activated in the *Features* menu, the resources and the allocated working hours are displayed in a table below the schedule.



6.2 Project Team Tab - Assemble project team manually

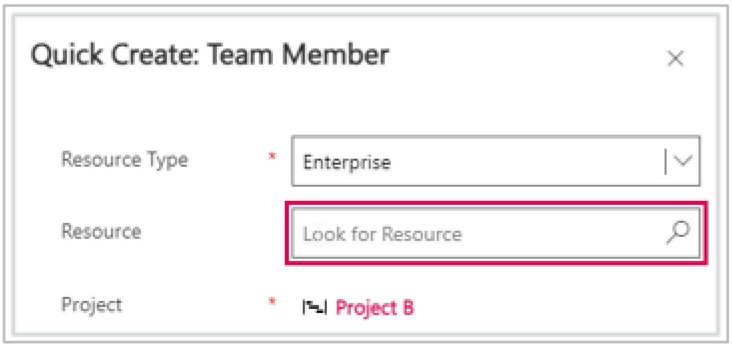
▶ Only for project types with the *Project Team* tab.

- 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.

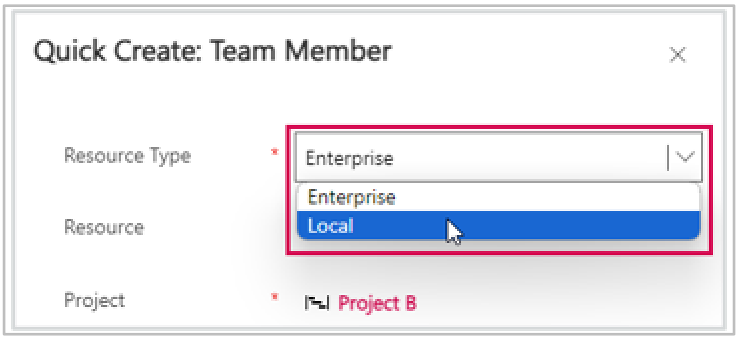


- Search for the desired person.
  - Add further team members: Click on the arrow next to the Save button and select *Save & Create New*.

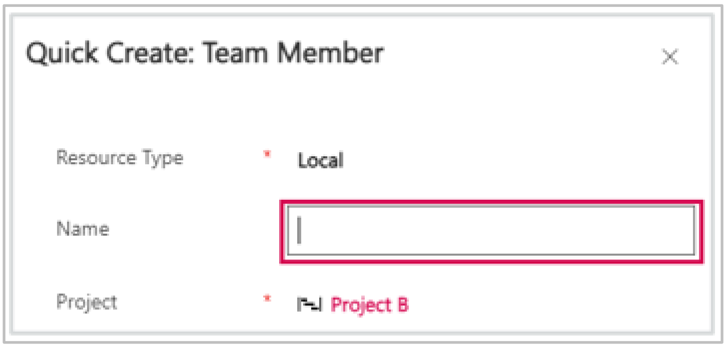
- Click *Save and Close* to complete the task.

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

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



- 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.

Available views in the resource plan

There are two different views available in the resource plan, which differ in terms of the period displayed:

- The monthly view for a single year is the default view.
  In this view, resources are planned and displayed on a monthly basis within a calendar year. This view is particularly suitable for detailed planning within a year.
- In addition, the Multi-year view is available.
  In this view, resource planning is displayed over several years. The Multi-year view facilitates an overview of long-term planning and resource utilization that extends beyond the end of the year.

▶ The resource planning steps described in this section apply to both views.

▶ For clarity, the steps are shown using the default view.

▶ The use of the Multi-year view is described in the section Use Multi-year view in Resource Plan 95.

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

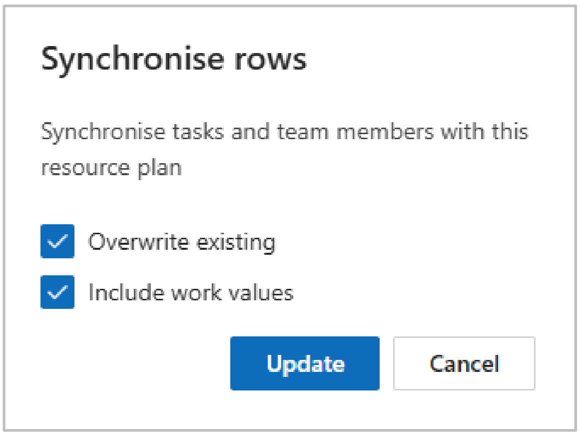
Add Resources and enter work values:

➢ Click *Sync* (1) to transfer already assigned resources to the resource plan. ▶ The *Synchronize rows* dialog box opens.

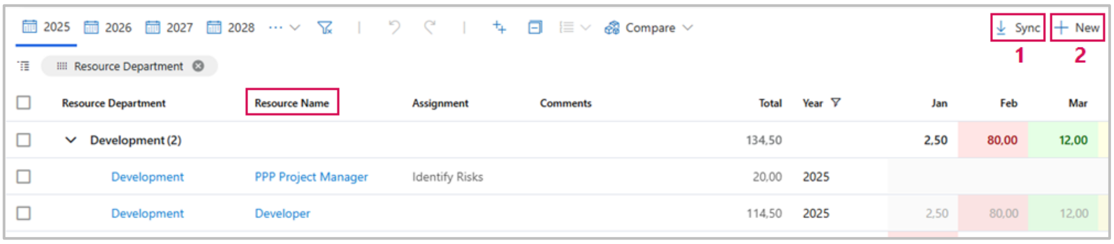
➢ Click on the *Overwrite existing* checkbox.

➢ 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.

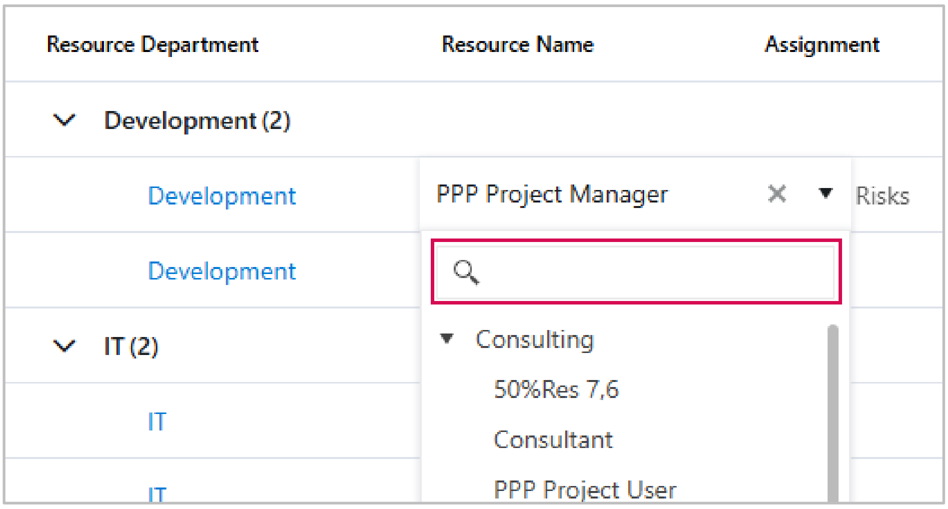


➢ Click on *New* (2) to add resources manually. ▶ A new row appears in the table.



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

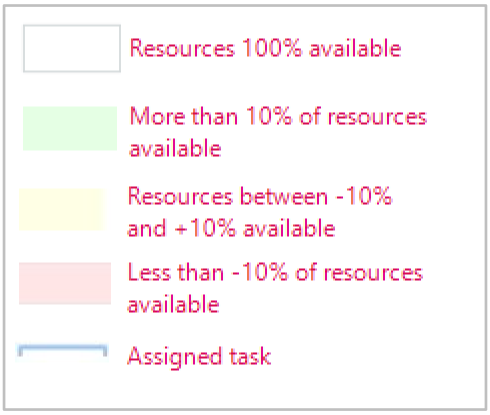
➢ Select the name of the desired resource in the drop-down menu.



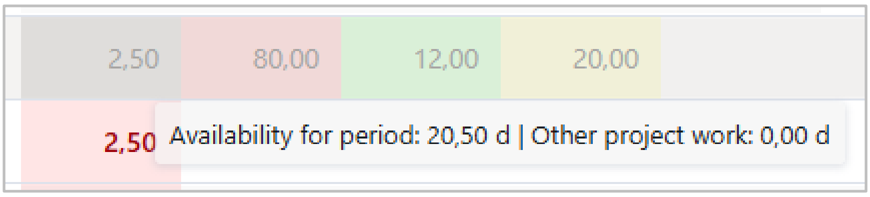
▶ The *Resource Department* column is filled in automatically if data is available.

▶ The resource is added.

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



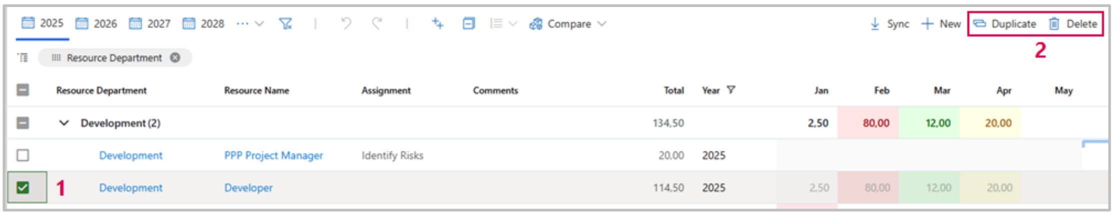
The mouseover shows the number of days on which the resource is available or otherwise scheduled.



▶ 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:

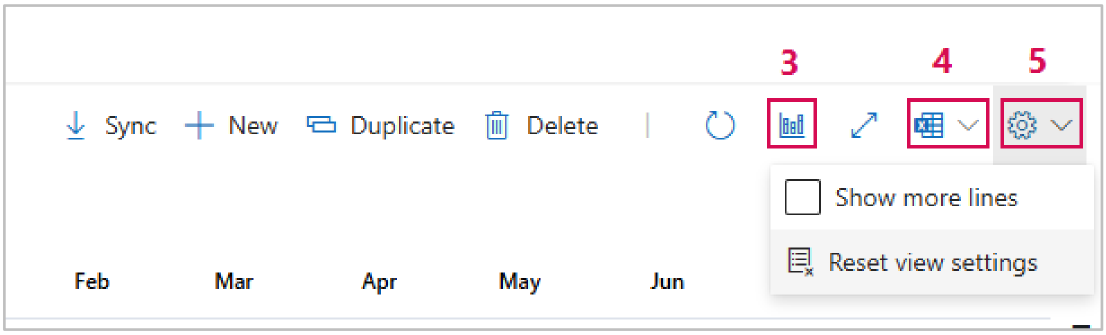
  ➢ Click on the graphic pictogram. (3) ▶ A diagram is shown or hidden below the table.

- Export all selected rows to Excel:

  ➢ Click on the Excel pictogram. (4)

- Show more rows or reset display settings:

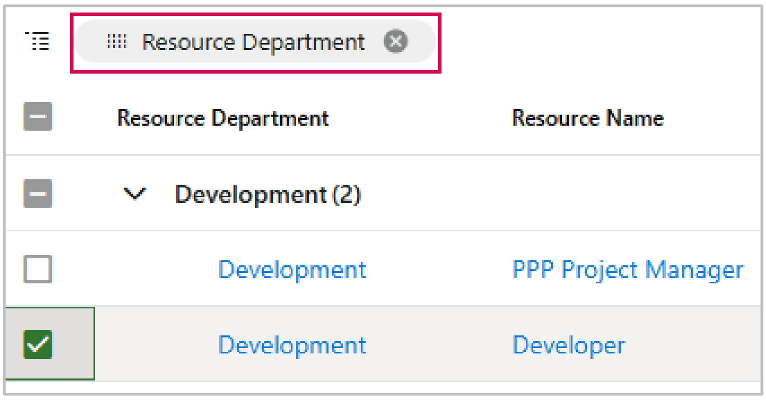
  ➢ Click on *Settings* (gear wheel). (5)



- Change standard groupings:

  ➢ Drag column header over table.

  ➢ Remove column headings: Click on the cross.



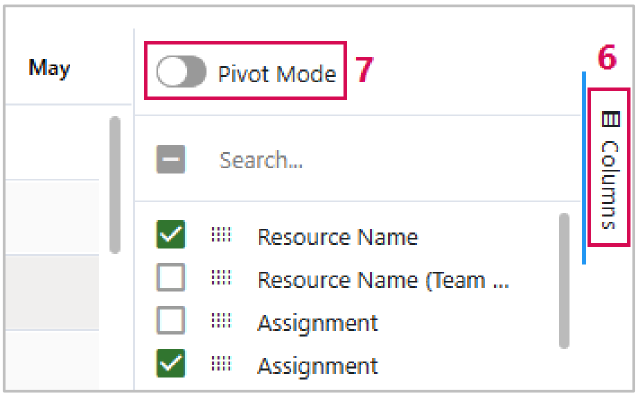
➢ Show and hide columns:

  ➢ 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.



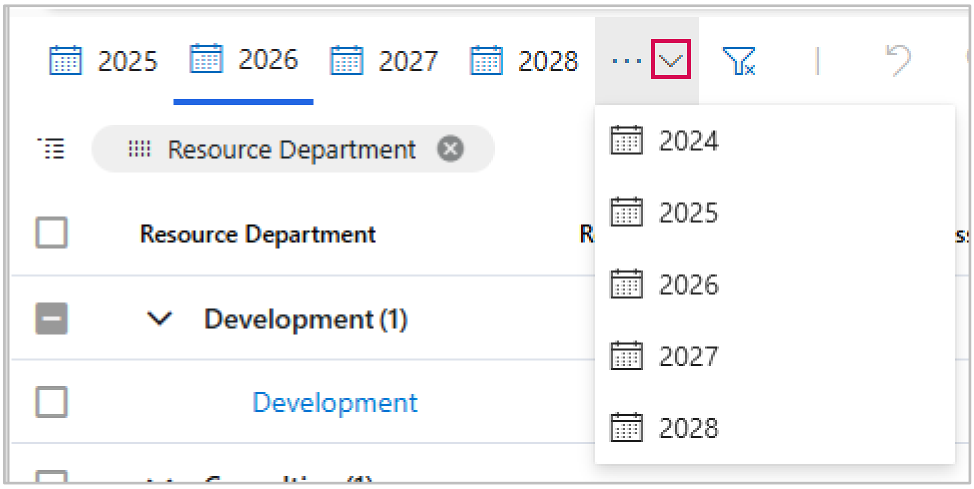
Navigating between years:

➢ Click on one of the years displayed to view its resource planning. The currently displayed year is underlined in blue.

Or

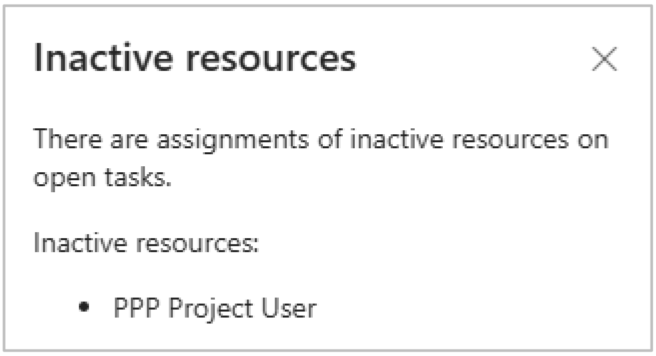
➢ Click on the down arrow to select a specific year from the drop-down menu.

▶ The view will jump to the corresponding year.



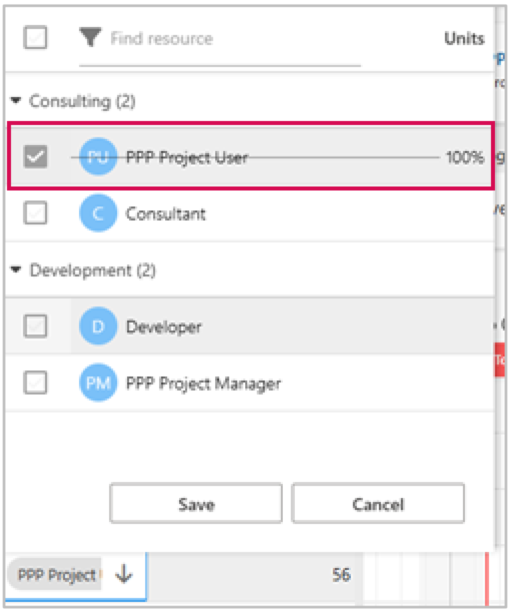
6.4 Inactive Resource

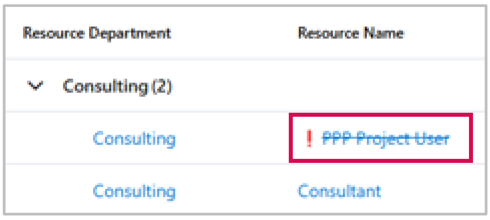
A warning appears if you open a schedule in which open tasks are assigned to a deactivated resource.



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.





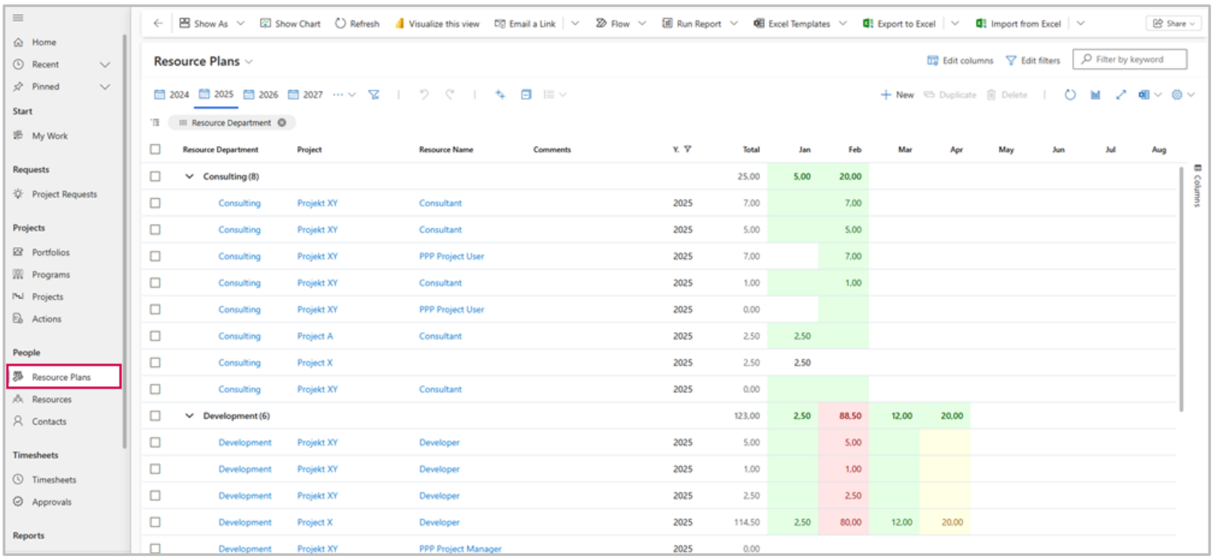
6.5 Resource Plans Overview

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.



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.

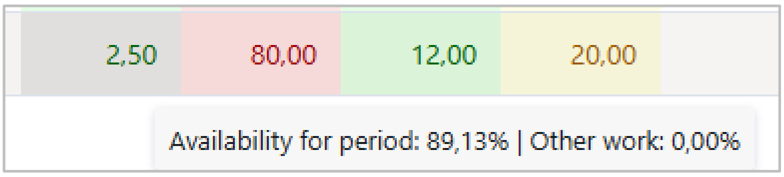
Color Scheme of Resource Availability:

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:



6.6 Use Multi-year view in Resource Plan

The Multi-year view in the resource plan displays all resource lines over several years. This makes resource planning beyond the turn of the year easier to recognize.

▶ If the Multi-year view is not available, it must be activated by an administrator. In this case, contact your administrator.

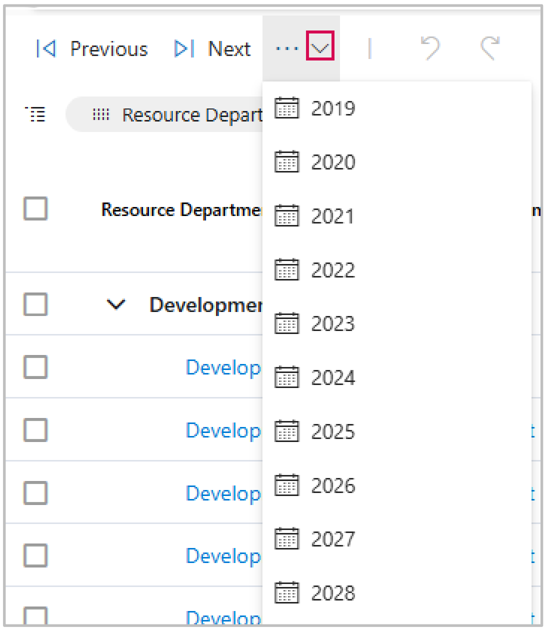
▶ The number of years displayed can be changed by the administrator.

▶ The creation of the resource plan is described in detail in the section Resource Plan Tab - Create Resource Plan manually 87.

Navigating between years:

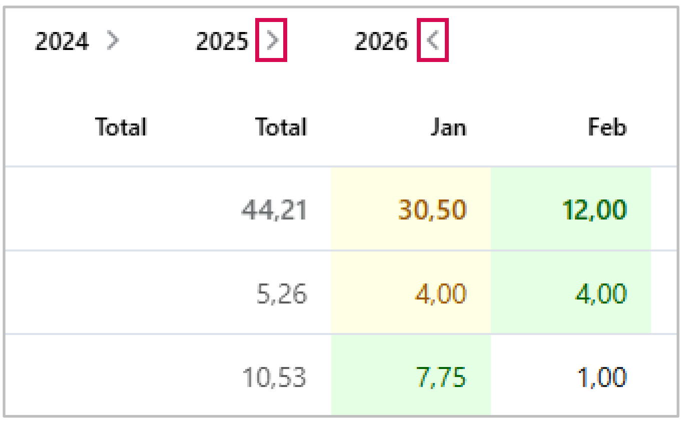
- ➢ Click *Previous* to switch to the display of previous years.
- ➢ Click *Next* to switch to the display of subsequent years.
- ➢ Click the down arrow to select a specific year from the drop-down menu.

▶ The view will jump to the corresponding year.



Expand or Collapse Years

- ➢ Click the icon (arrow pointing right or left) to expand or collapse a year.
- ➢ Collapse years you do not need in order to reduce the view.
- ➢ Expand additional years to display more time periods.



Total amount over several years:

The software automatically calculates the total number of working hours across all currently visible years. This total is displayed in the *Total* column (1).

Total per calendar year:

The software also determines the total number of working hours within a single calendar year. The annual total - for example, for the year 2025 - appears in the *Total* column (2).

1	2024	2025	2026	
Total	Total	2 Total	Jan	Feb
86,71		44,21	30,50	12,00
13,26		5,26	4,00	4,00
19,28		10,53	7,75	1,00
10,87		7,37	2,50	1,00
10,26		5,26	3,00	2,00
3,00		0,00	2,00	1,00
10,37		7,37	2,00	1,00
13,62		7,37	5,25	1,00
6,05		1,05	4,00	1,00
42,84		26,84	8,00	8,00
17,32		1,32	8,00	8,00

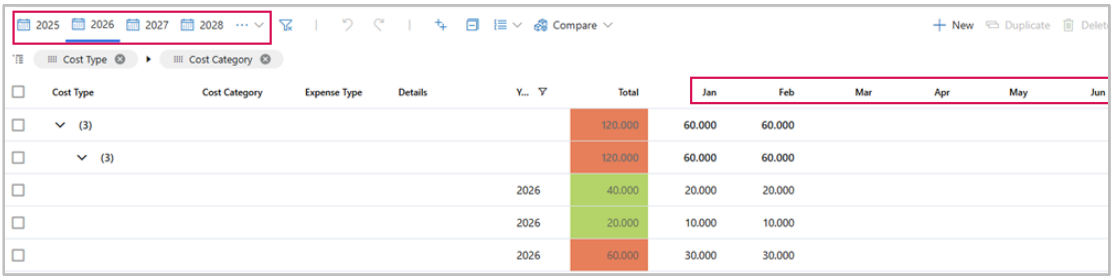
7 Budget Planning

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

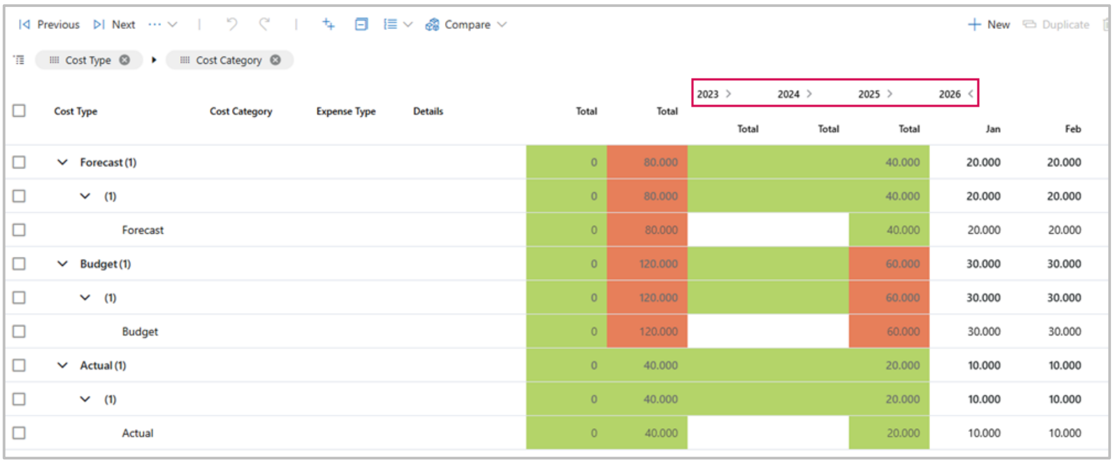
Available views in cost planning

There are two different views available in cost planning, which differ in terms of the period displayed:

- The monthly view for a single year is the default view.
  In this view, costs are planned and displayed on a monthly basis within a calendar year. It is particularly suitable for detailed cost planning within a year.



- In addition, the Multi-year view is available.
  In this view, cost plans are displayed over several years. The Multi-year view facilitates an overview of long-term cost developments and planning across annual boundaries.



▶ The functions of the buttons are the same as in the *Resource Plan* tab. (see Resource Plan tab - Create Resource Plan manually 87)

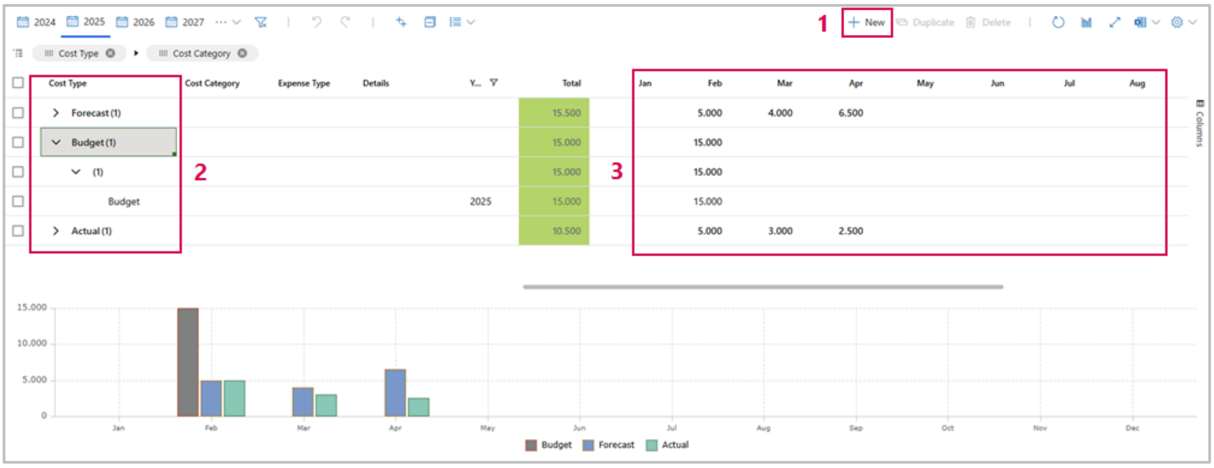
▶ For clarity, the steps are shown using the default view.

▶ The use of the Multi-year view is described in the section Use Multi-year view in Resource Plan 95.

Add financial data:

- ➢ 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 27)

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.

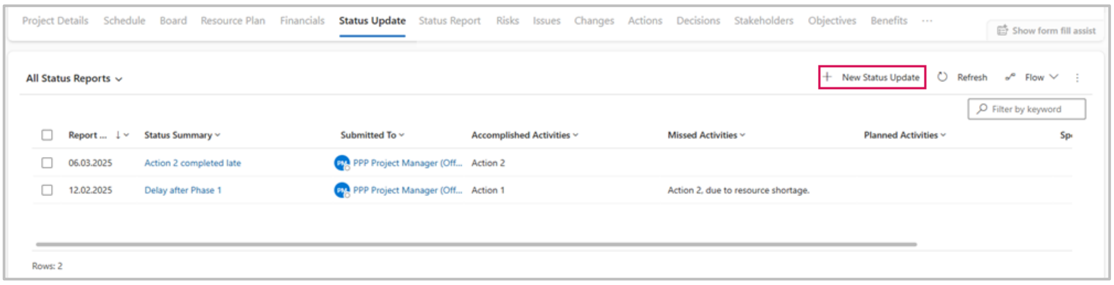
We will guide you through the process step by step and show you how to work with status updates:

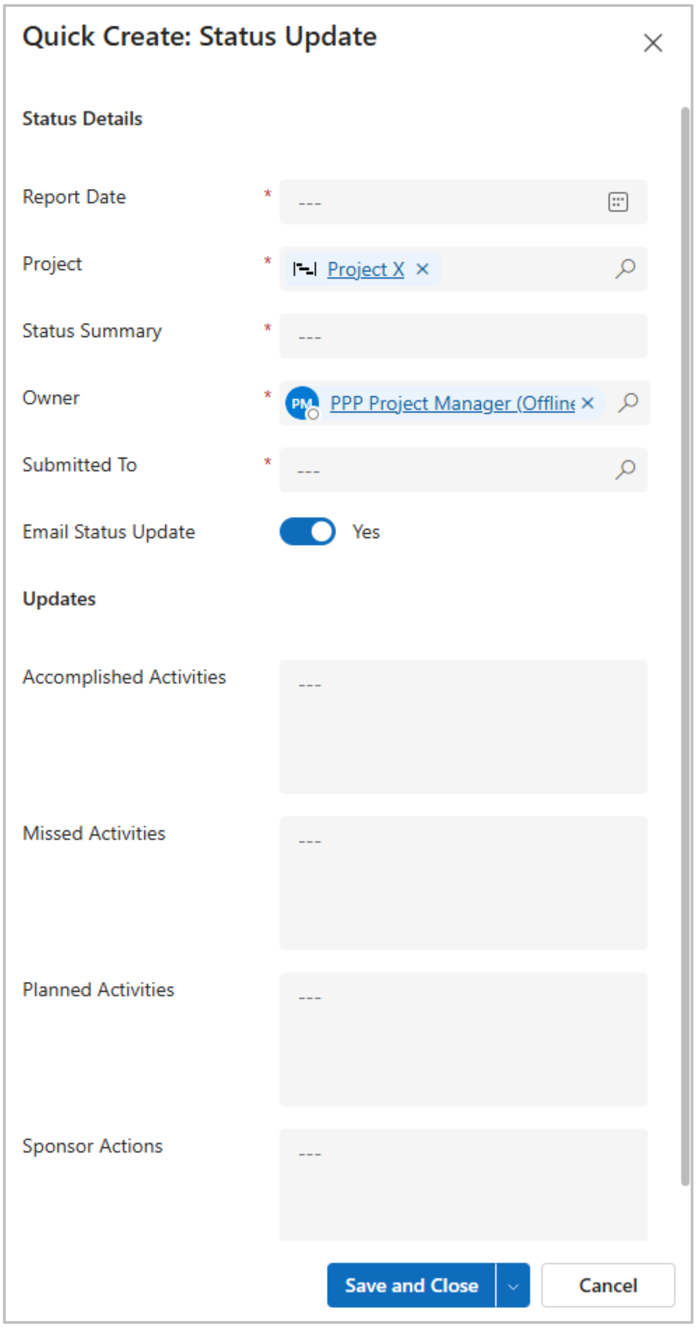
- Add Status Update 100
- Edit Status Update 103
- Deactivate and Activate Status Update 104
- Adjust Table 106
- Further Commands for Status Updates 108

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.





➢ 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.

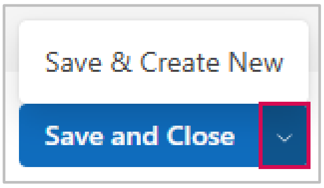
- *Updates*: Description of the status updates.

  ➢ 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

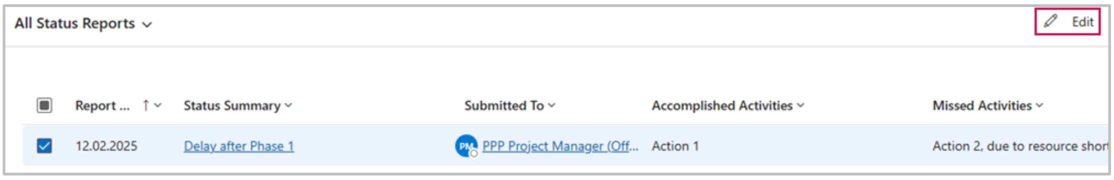
A status update can be edited as follows:

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

Or

➢ Click on the row of the status update to select it.

➢ Click on *Edit*.

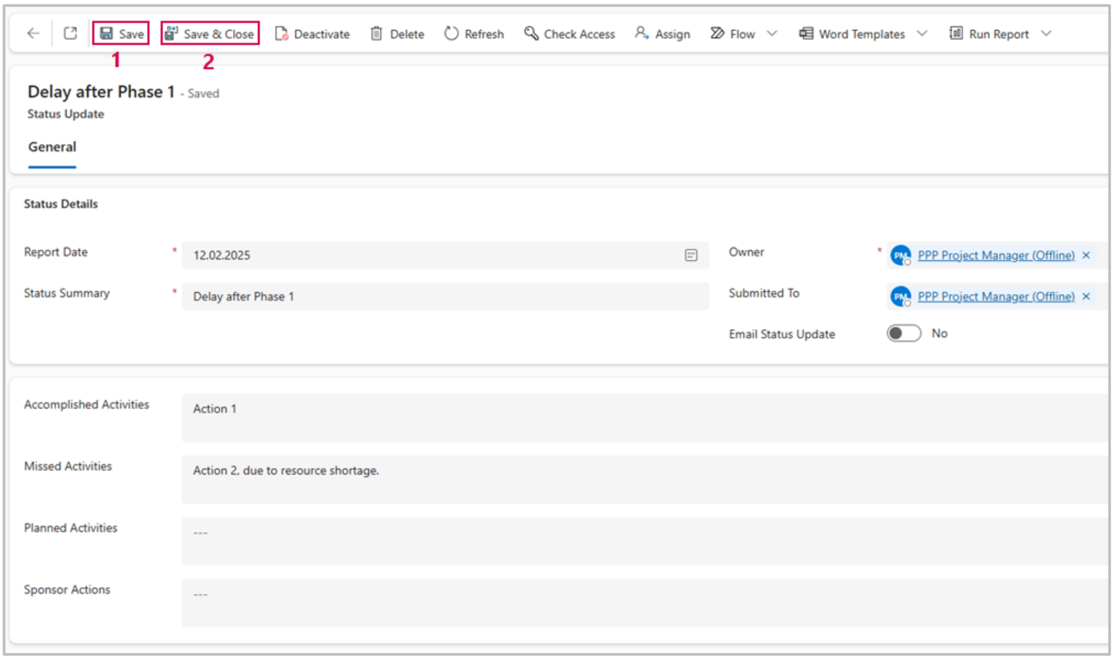


➢ Enter the desired changes in the form.

➢ Click *Save* (1) to save the changes and continue editing.

Or

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



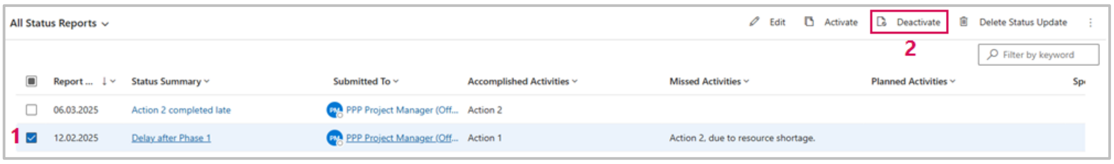
8.3 Deactivate and Activate Status Update

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

➢ Select the status update you want to deactivate.

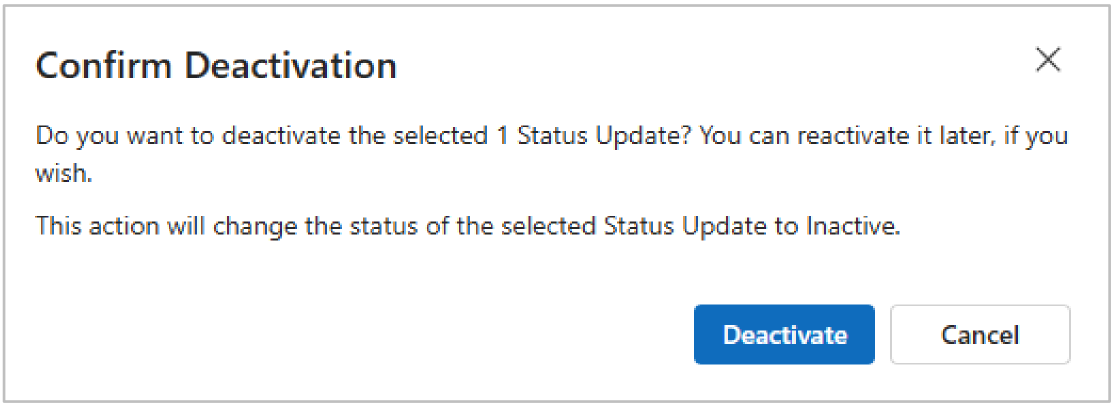
➢ Click on the row of the status update to select it. (1)

➢ Click on *Deactivate*. (2)



▶ The *Confirm Deactivation* field opens.

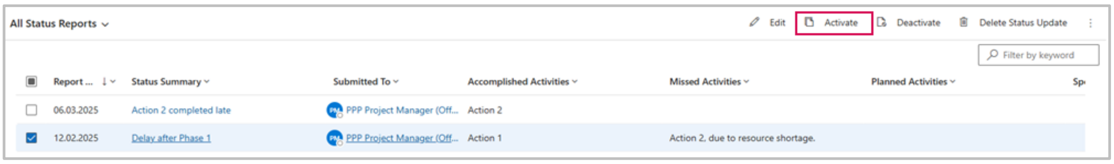
➢ Click *Deactivate* to deactivate the status update.



Activate status update:

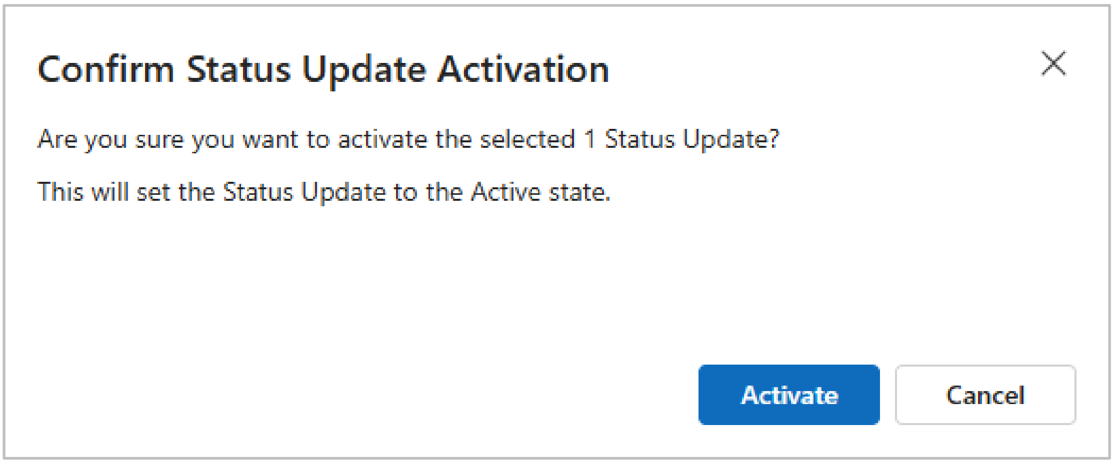
➢ Select the status update as described above.

➢ Click on *Activate*.



▶ The *Confirm Status Update Activation* field opens.

➢ Click *Activate* to activate the status update.

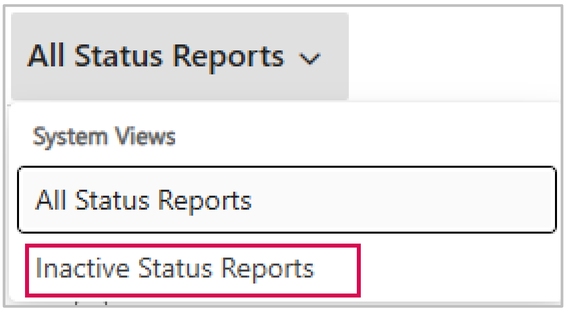


By default, all active and inactive status updates are listed in the table. You can display only inactive status updates in the table:

➢ Go to *All Status Reports.*

➢ Click the down arrow.

➢ Click on *Inactive Status Reports*.

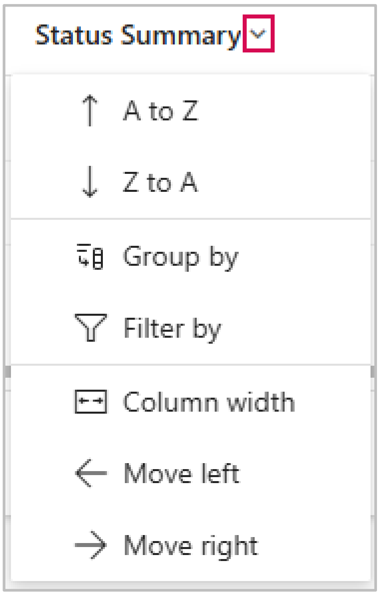


8.4 Adjust Table

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.

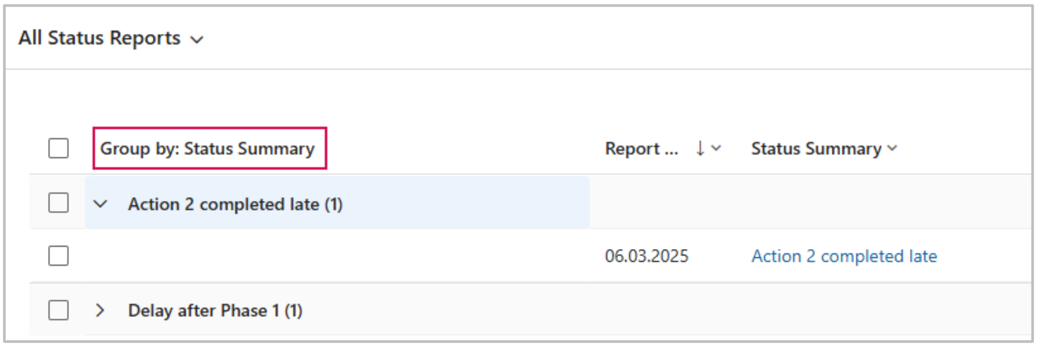
➢ Click the down arrow to the right of the column header. ▶ A dropdown menu opens.



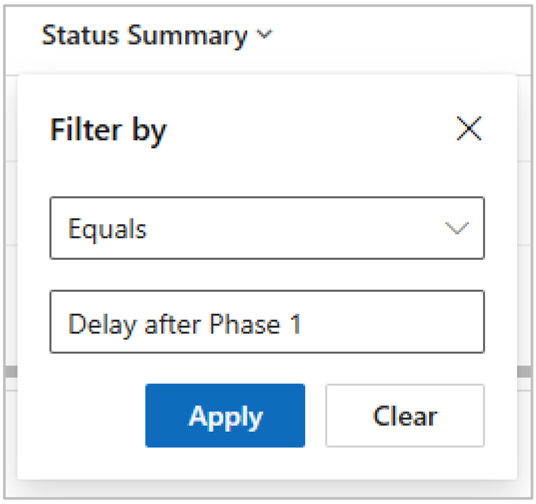
➢ Select the desired option:

- 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*).



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



▶ 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.

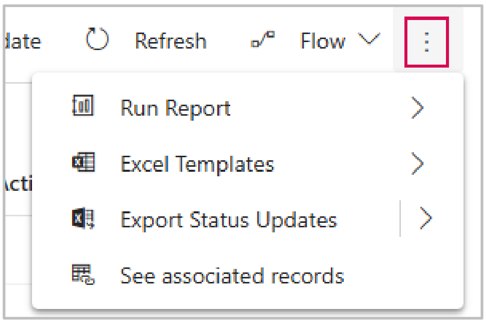
Refresh table:

➢ Click *Refresh* to update the table.

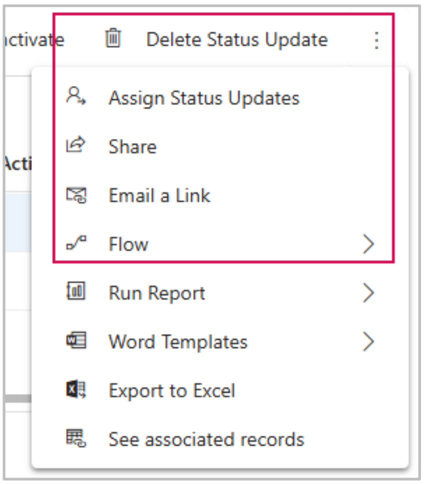
8.5 Further Commands for Status Updates

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.



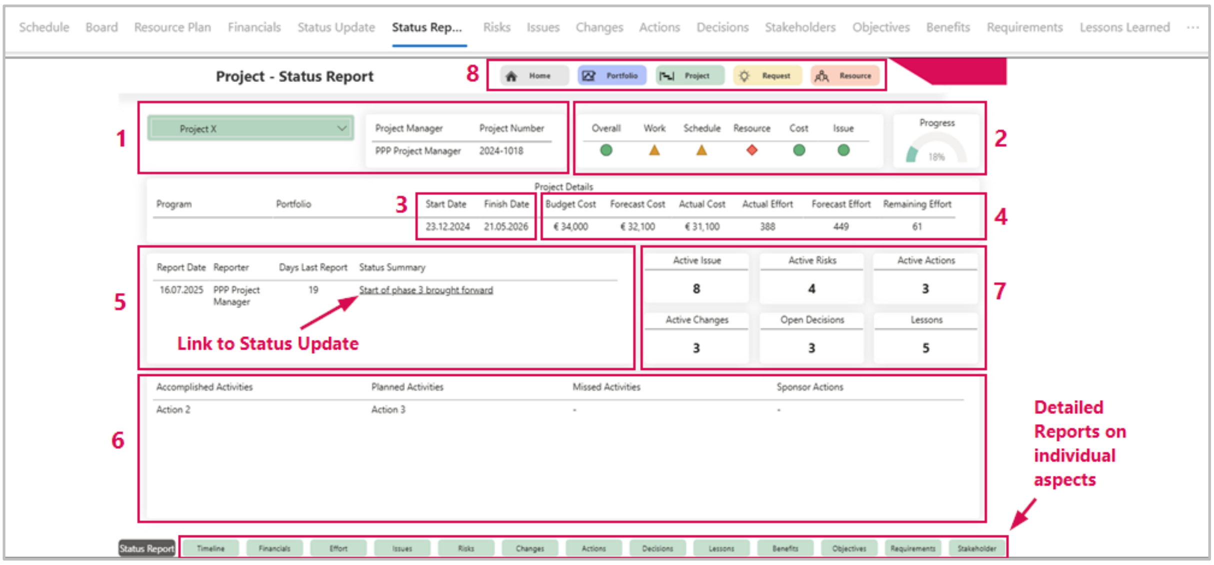
➢ Select the desired command:

- *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.



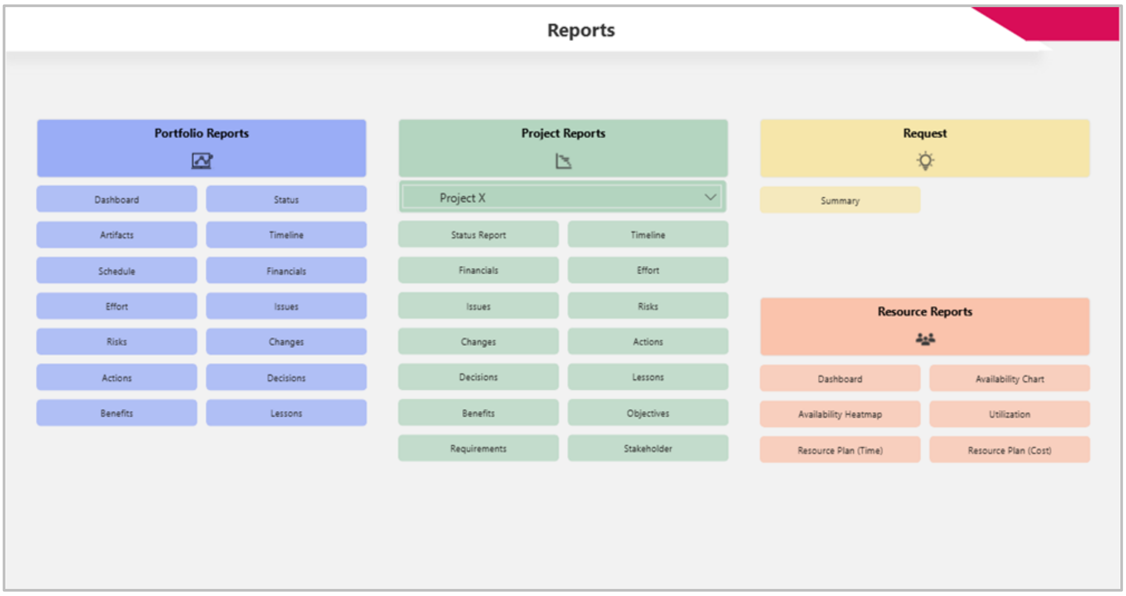
On the start page of this tab, you will find the most important information about the current project, such as:

- 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 29 (2)
- Project start and end dates (3)
- Cost development (4)
- Information and link to the last Status Update 100 (5)
- Actions from the last Status Update and their implementation status (6)
- Number of active Issues 139, Risks 129, Changes 147, Actions, open Decisions 177, and Lessons 220 (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 112
- Financials 114
- Effort 117
- Issues 119
- Risks 120
- Changes 121
- Actions 122
- Decisions 123
- Lessons 124
- Benefits 125
- Objects 126
- Requirements 127
- Stakeholder 128

▶ 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 11. 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:

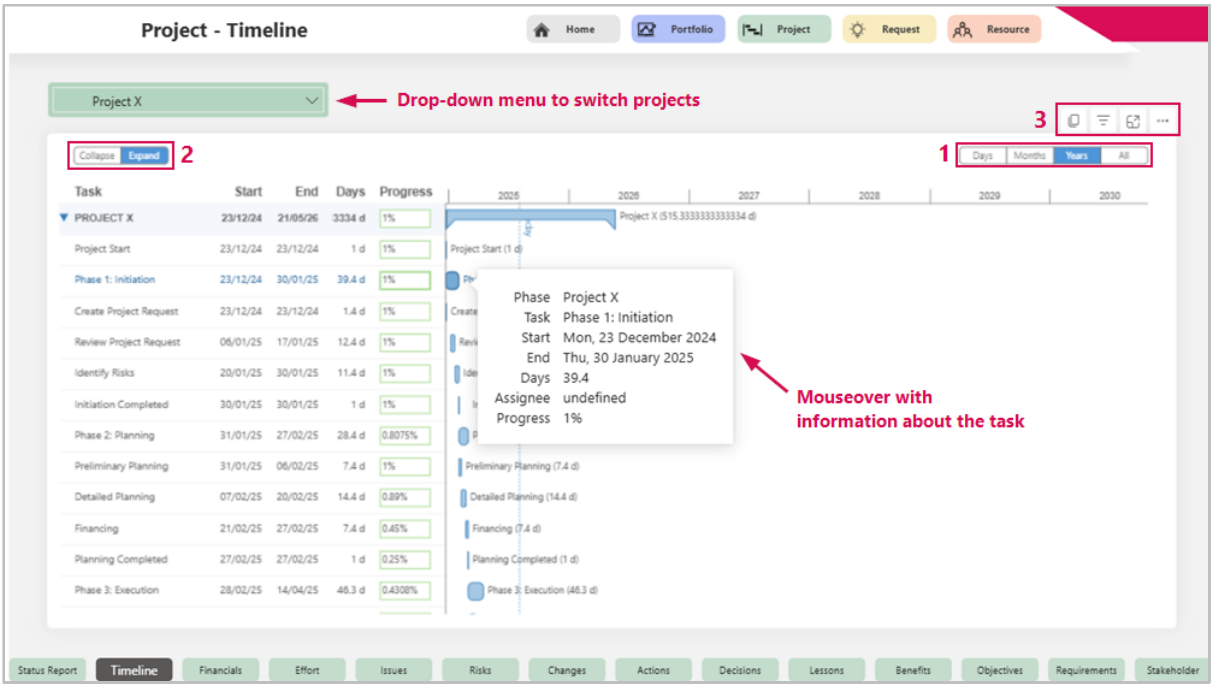
- Rows: Task of a project
- Columns: Start, end, days, and progress of the task

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).

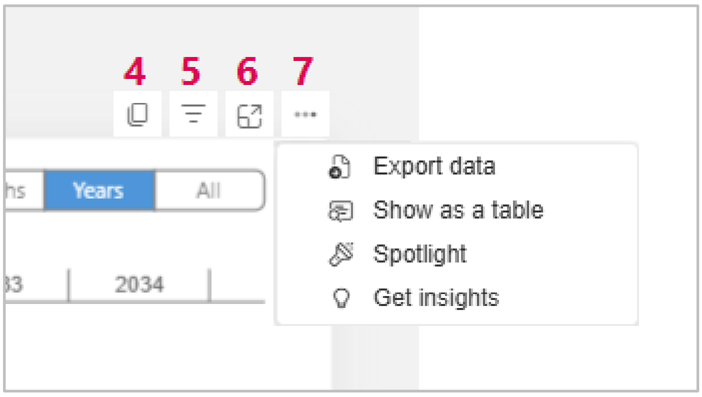
Expand and collapse tasks (2)**:**

➢ Click *Collapse*. ▶ All tasks are collapsed.

➢ Click *Expand*. ▶ All tasks are expanded.

Additional options (3):

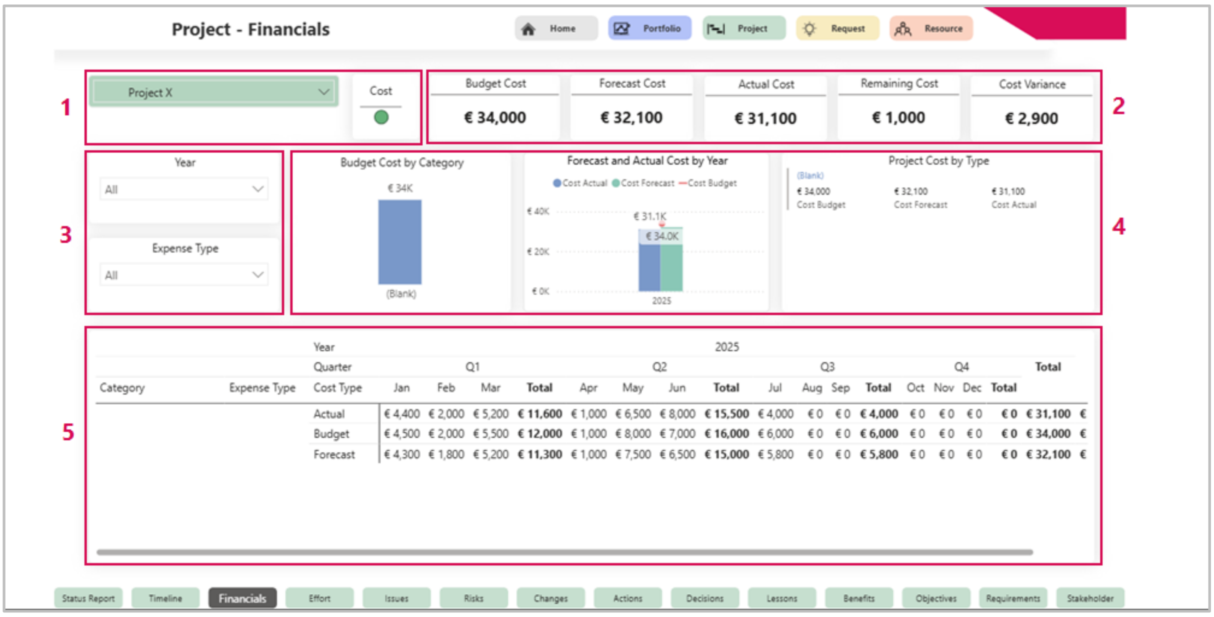
- Copy timeline as graphic. (4)
- Apply filters to influence the visual representation. (5)
- Show only enlarged timeline. (6)
- More options (7):
  - Export data
  - Display data as table
  - Highlight timeline
  - Show insights



9.2 Financials

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

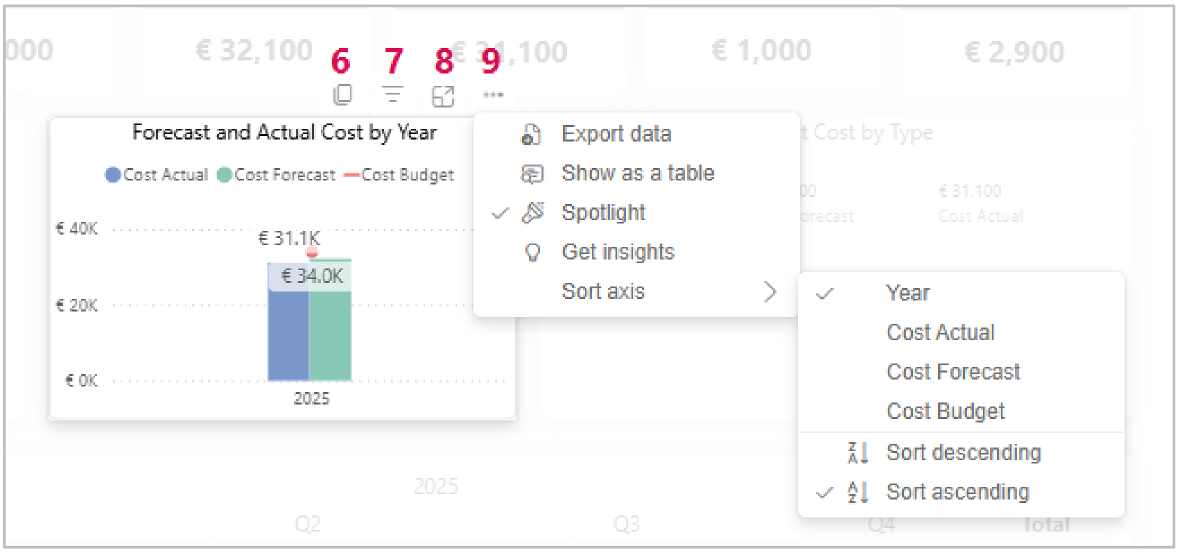
- Project name and traffic light display for evaluating the current cost situation (1)
- Numerical information on costs (2):
  - Budget Cost
  - Forecast Costs
  - Actual Cost
  - Remaining Cost
  - Cost Variance
- Filter and customize data using two drop-down menus (3):
  - Select the year for which 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:

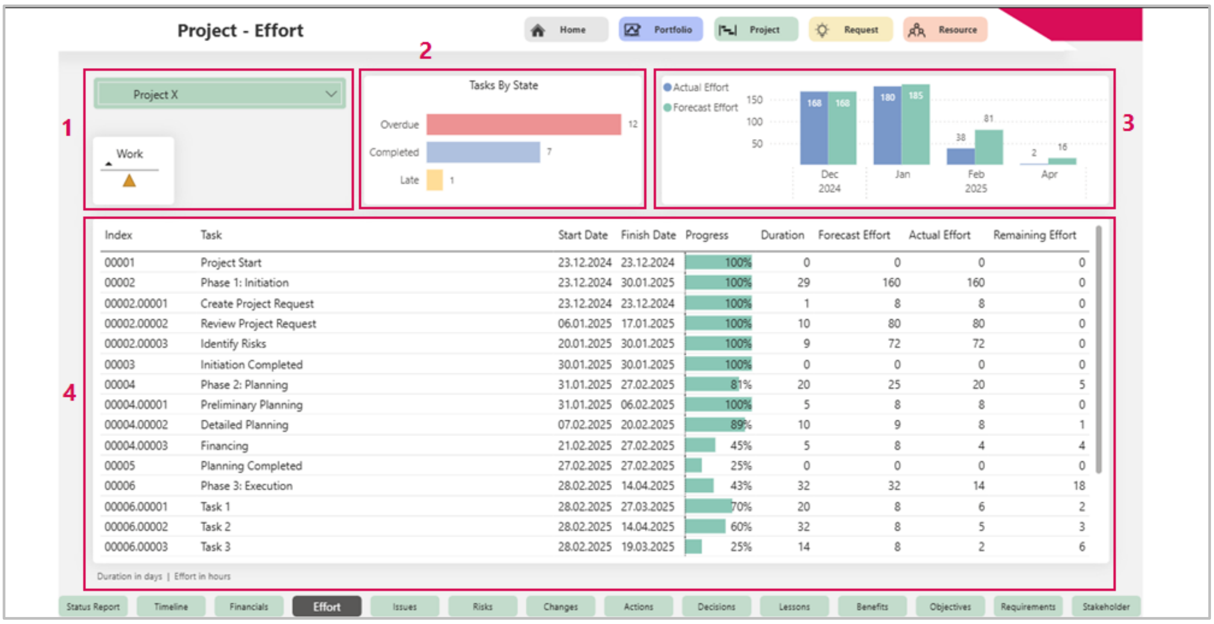
- Copy bar chart as graphic (6)
- Apply filters to influence the visual display (7)
- Display enlarged bar chart (8)
- More options (9):
  - Export data
  - Display data as a table
  - Highlight bar chart
  - Display insights
  - Sort axes


6
7
8
9
Forecast and Actual Cost by Year
Cost Actual
Cost Forecast
Cost Budget
€ 40K
€ 20K
€ 0K
€ 31.1K
€ 34.0K
2025
Export data
Show as a table
Spotlight
Get insights
Sort axis
Year
Cost Actual
Cost Forecast
Cost Budget
Sort descending
Sort ascending

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*



Project - Effort
Home
Portfolio
Project
Request
Resource
1
2
3
4
Project X
Work
Tasks By State
Overdue 12
Completed 7
Late 1
Actual Effort
Forecast Effort
150
100
50
168 168
180 185
38 81
2 16
Dec 2024
Jan
Feb 2025
Apr
Index Task Start Date Finish Date Progress Duration Forecast Effort Actual Effort Remaining Effort
00001 Project Start 23.12.2024 23.12.2024 100% 0 0 0 0
00002 Phase 1: Initiation 23.12.2024 30.01.2025 100% 29 160 160 0
00002.00001 Create Project Request 23.12.2024 23.12.2024 100% 1 8 8 0
00002.00002 Review Project Request 06.01.2025 17.01.2025 100% 10 80 80 0
00002.00003 Identify Risks 20.01.2025 30.01.2025 100% 9 72 72 0
00003 Initiation Completed 30.01.2025 30.01.2025 100% 0 0 0 0
00004 Phase 2: Planning 31.01.2025 27.02.2025 81% 20 25 20 5
00004.00001 Preliminary Planning 31.01.2025 06.02.2025 100% 5 8 8 0
00004.00002 Detailed Planning 07.02.2025 20.02.2025 89% 10 9 8 1
00004.00003 Financing 21.02.2025 27.02.2025 45% 5 8 4 4
00005 Planning Completed 27.02.2025 27.02.2025 25% 0 0 0 0
00006 Phase 3: Execution 28.02.2025 14.04.2025 43% 32 32 14 18
00006.00001 Task 1 28.02.2025 27.03.2025 70% 20 8 6 2
00006.00002 Task 2 28.02.2025 14.04.2025 60% 32 8 5 3
00006.00003 Task 3 28.02.2025 19.03.2025 25% 14 8 2 6
Duration in days | Effort in hours
Status Report
Timeline
Financials
Effort
Issues
Risks
Changes
Actions
Decisions
Lessons
Benefits
Objectives
Requirements
Stakeholder

9.4 Issues

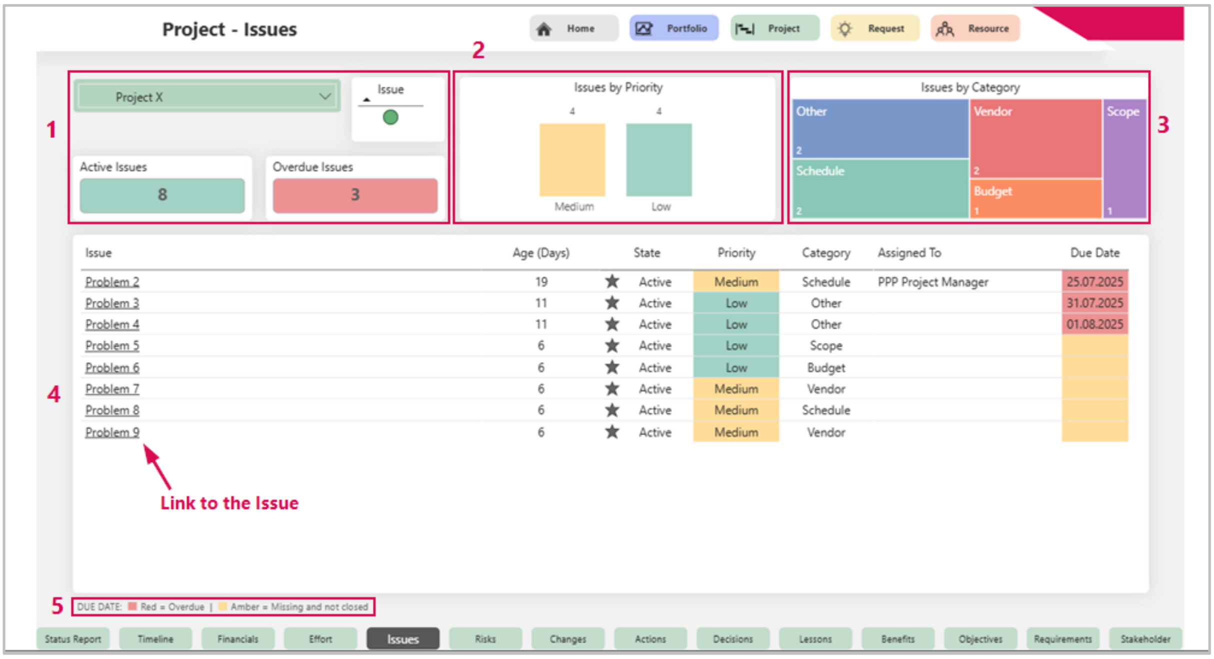
The *Issues* tab provides a detailed overview of all issues in the project.

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

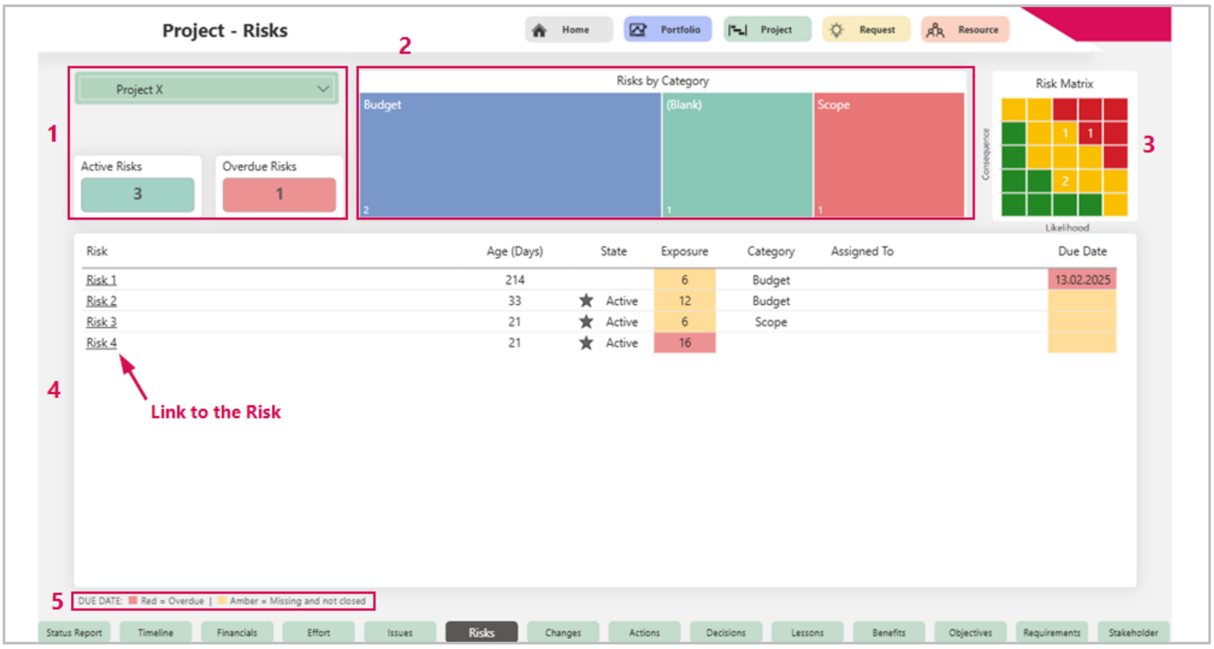
The *Risks* tab provides a detailed overview of all risks in the project:

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

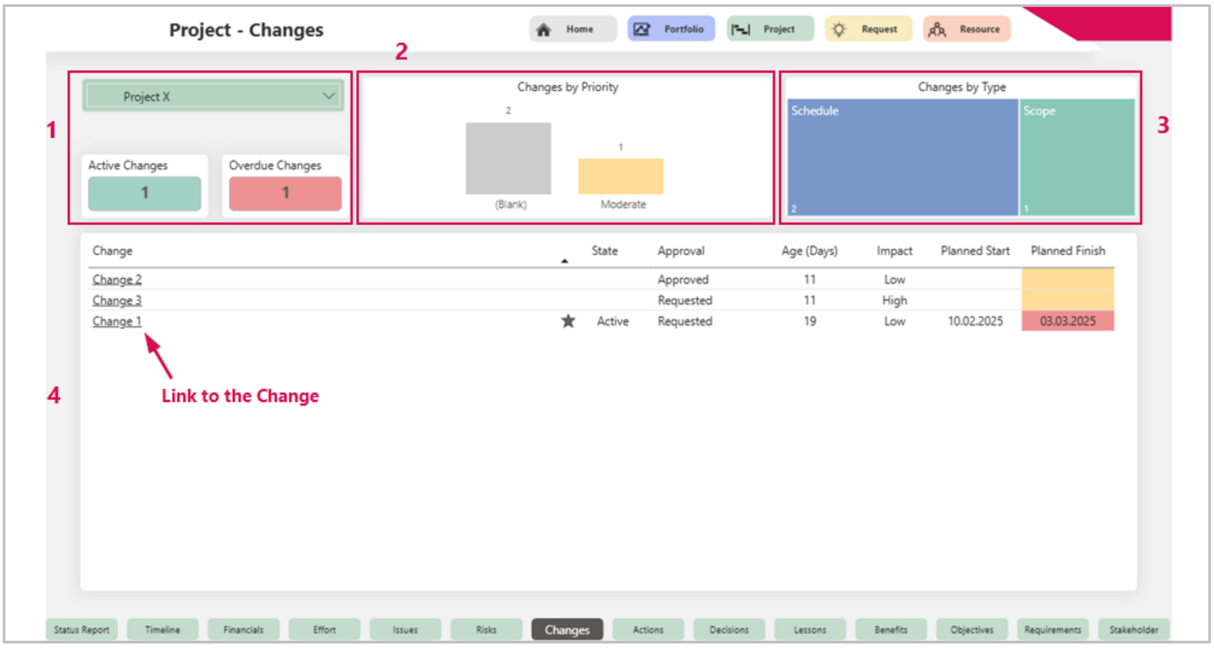
The *Changes* tab provides a detailed overview of all changes in the project.

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

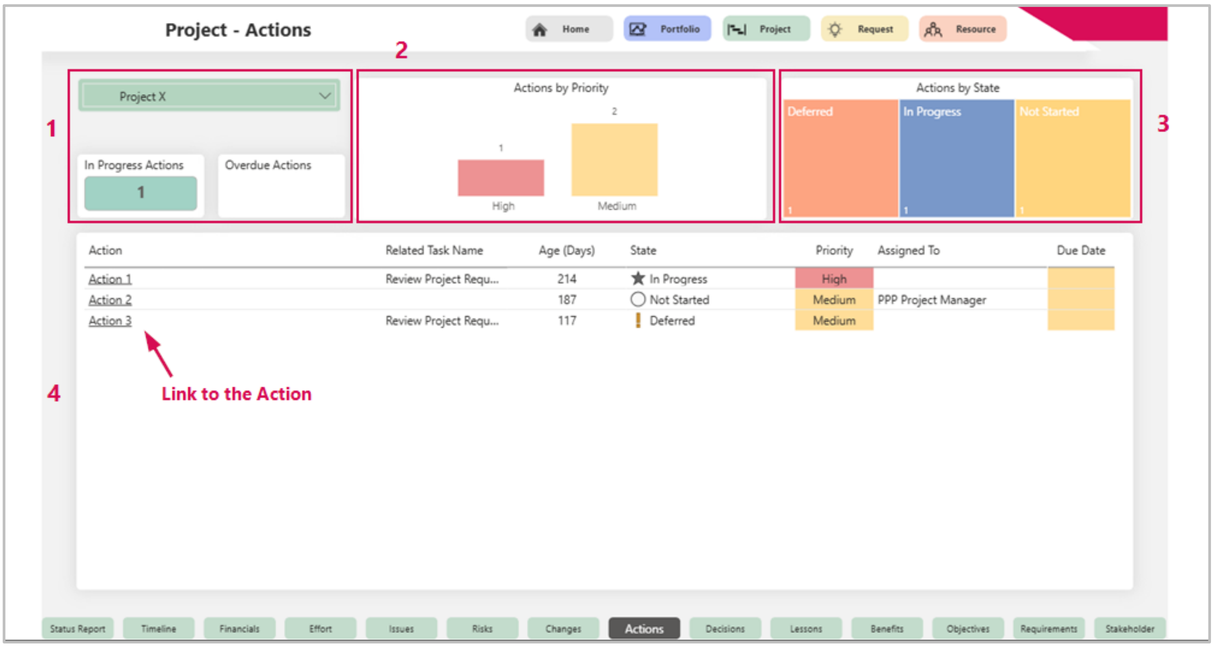
The *Actions* tab provides a detailed overview of all actions in the project.

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

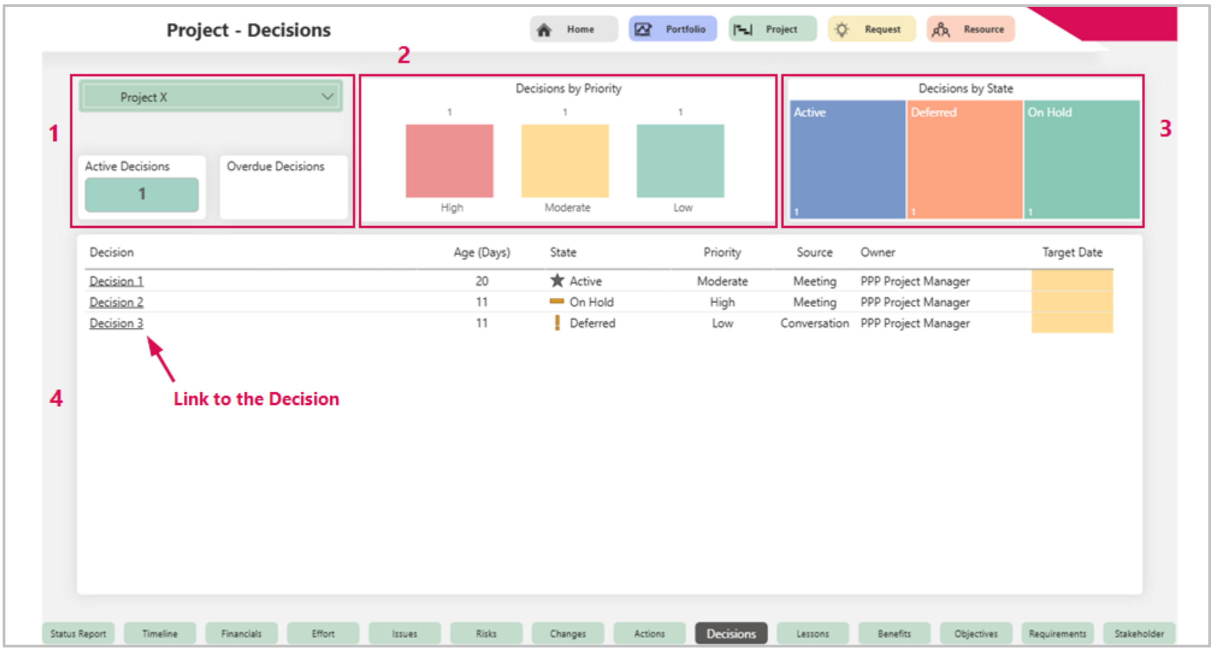
The *Decisions* tab provides a detailed overview of all decisions in the project.

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):

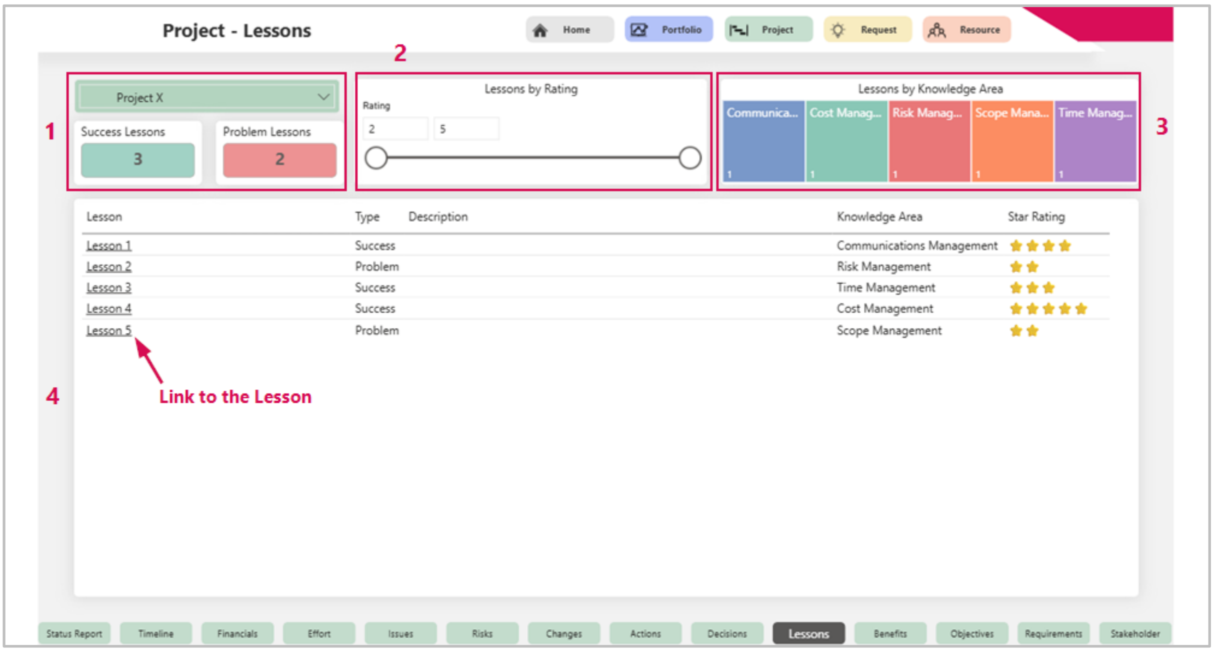
- Project Name
- Number of successful Lessons
- Number of problematic Lessons

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)



9.10 Benefits

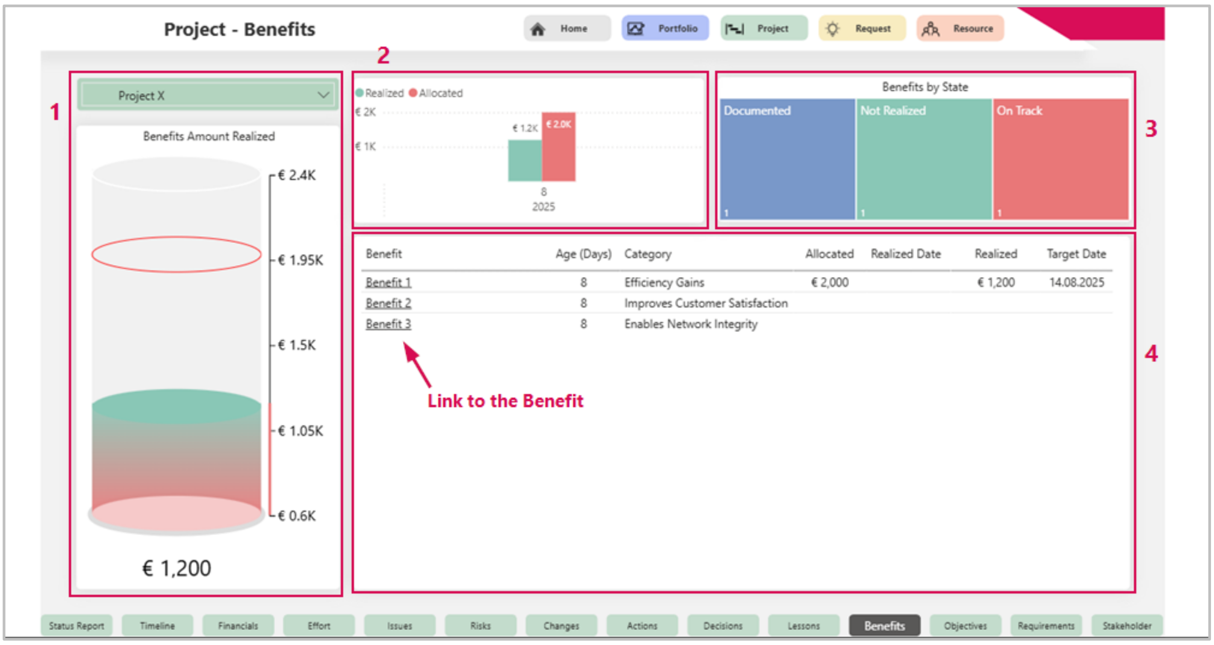
The *Benefits* tab provides a detailed overview of all benefits in the project.

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

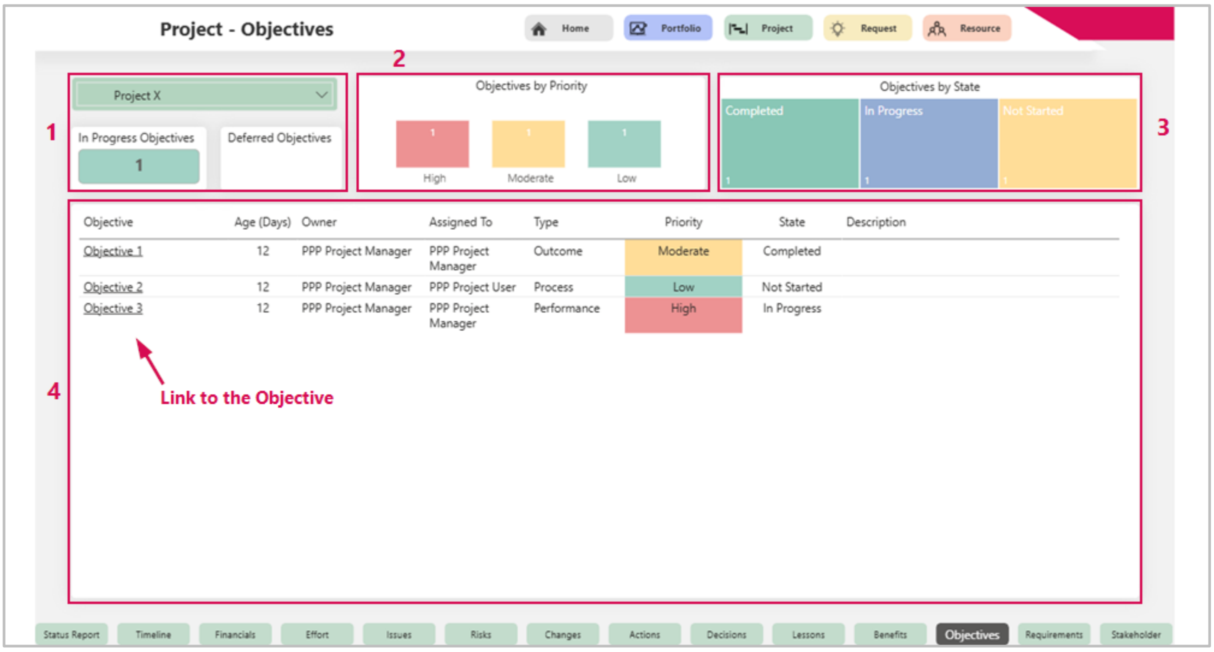
The *Objectives* tab provides a detailed overview of all objectives in the project.

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

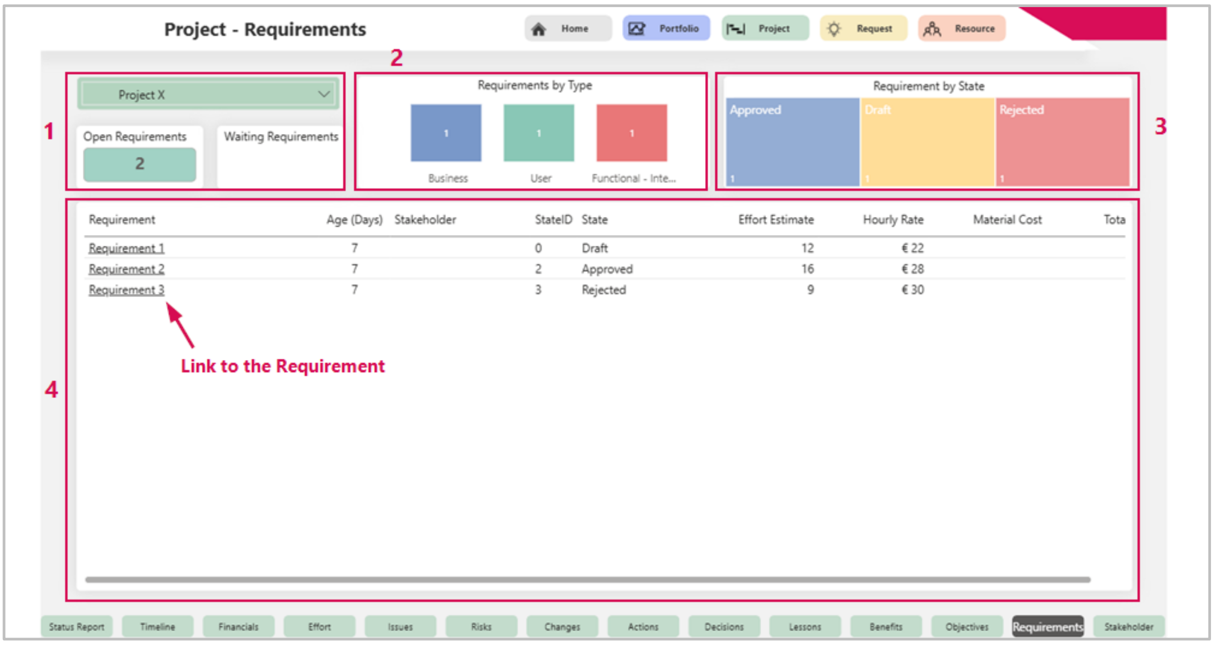
The *Requirements* tab provides a detailed overview of all requirements in the project.

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

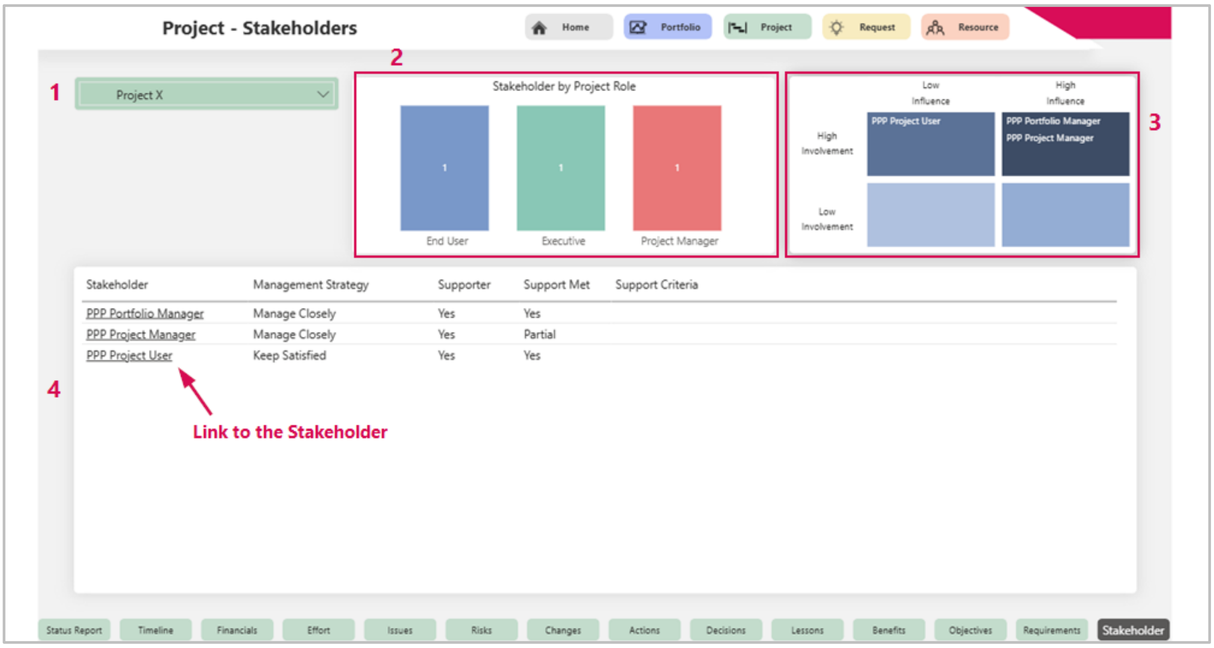
The *Stakeholders* tab provides a detailed overview of all stakeholders in the project.

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.

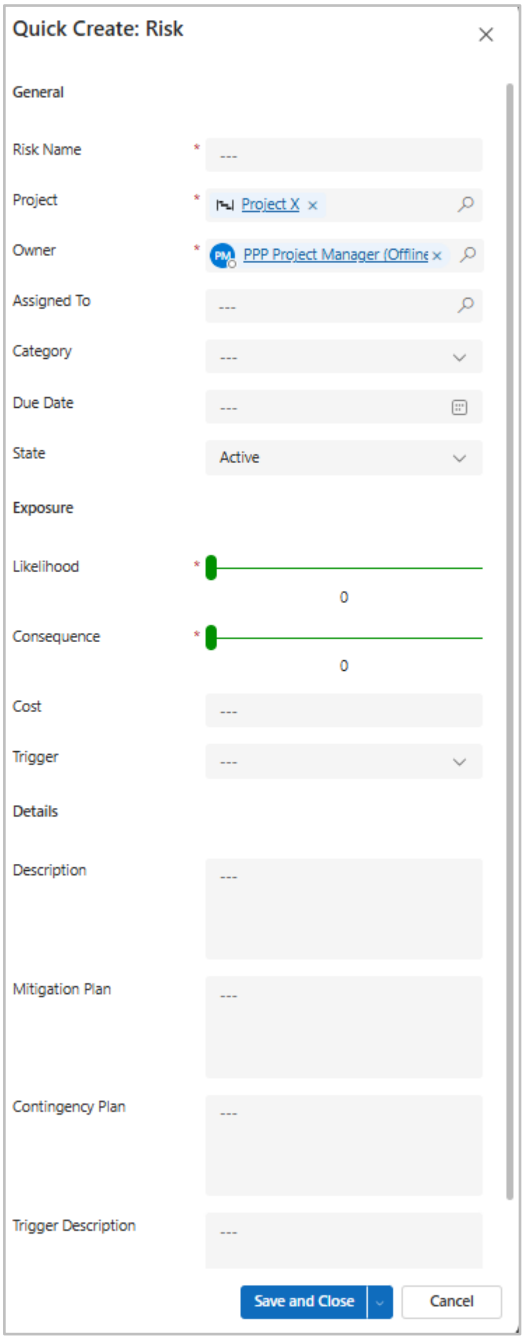
In this section, you will learn how to:

- Add Risks 129
- Edit Risks 133
- Deactivate and Activate Risks 134
- Read the Risk Matrix and set filters 136
- Use additional Commands for Risks 137

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.



➢ Fill out the form:

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

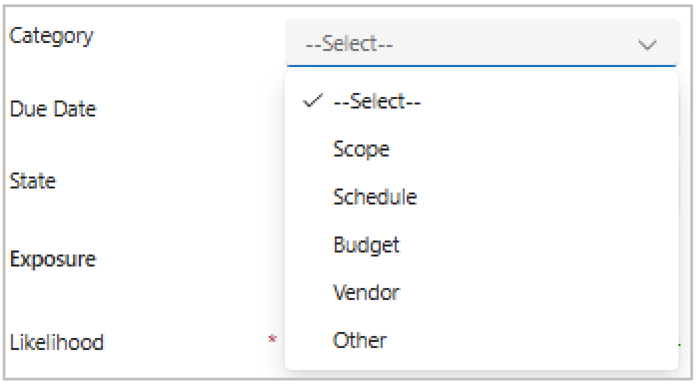
- *General:*
  - *Risk Name:* Enter a meaningful name for the Risk.
  - *Project:* The current project is selected by default.
  - *Owner:* Creator of the risk. The current user is entered by default.

▶ 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.

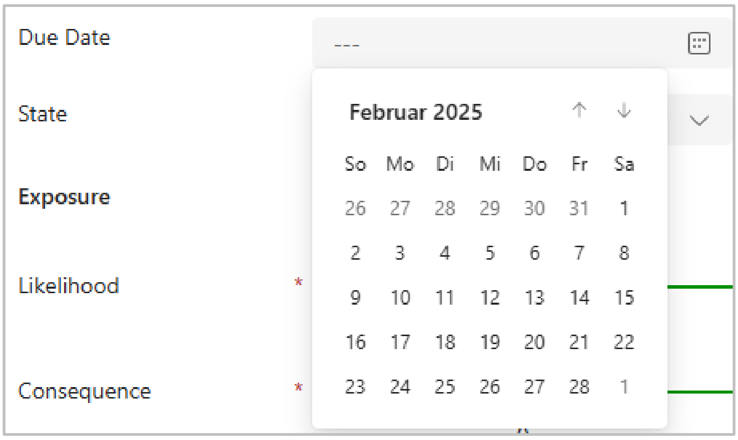
    ➢ Click in the input field, press the Enter key, and enter the desired stakeholder.
  - *Category:*

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



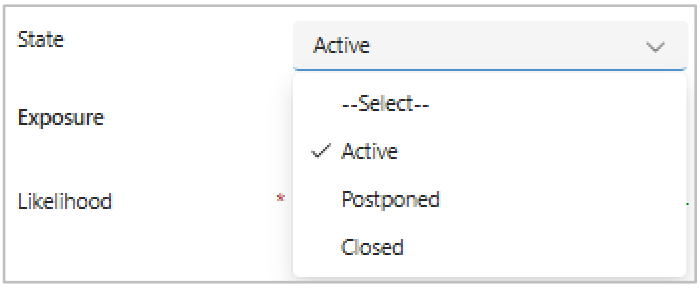
  - *Due Date:*

    ➢ 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.

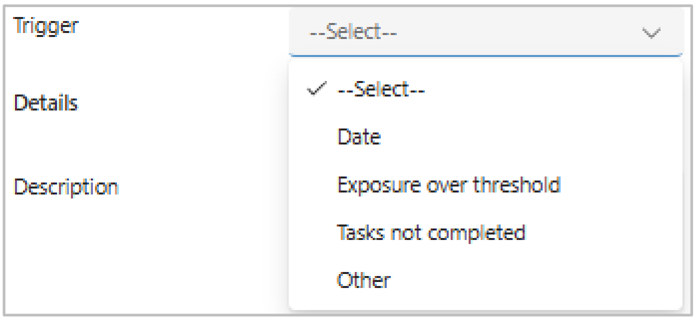


- *Exposure:*
  - *Likelihood*: Probability that the Risk will occur.

    ➢ 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.



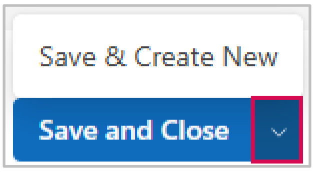
- *Details:*
  - *Description, Mitigation Plan, Contingency Plan, Trigger Description:*

    ➢ 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

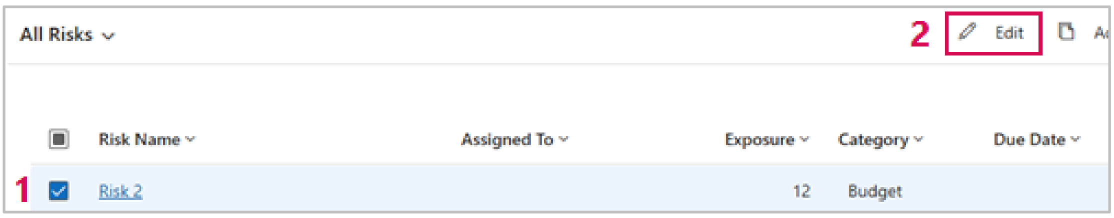
A Risk can be edited as follows:

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

Or

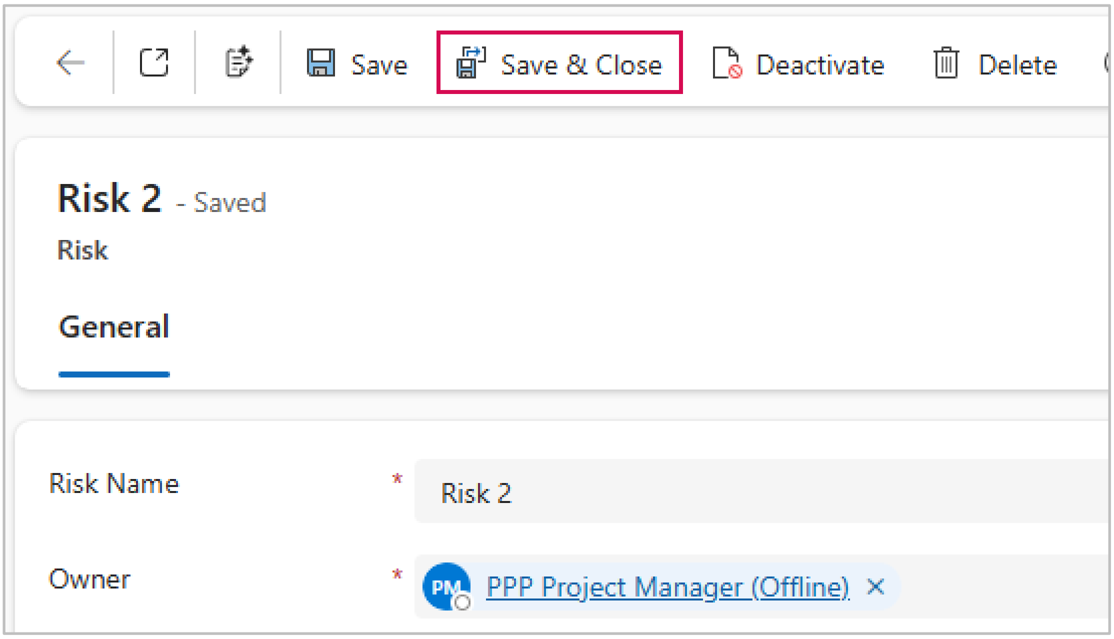
➤ Click on the row of the desired Risk to select it. (1)

➤ Click on *Edit*. (2)



➤ Enter the desired changes in the form.

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



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

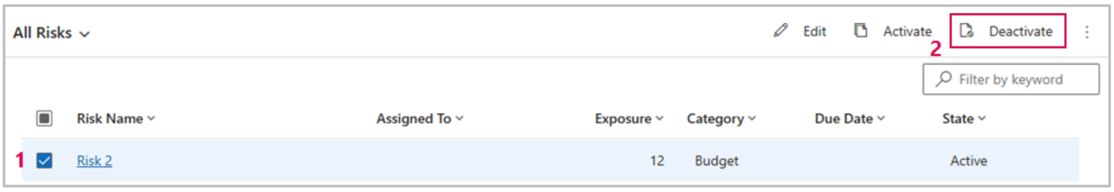
10.3 Deactivate and Activate Risks

Risks are active by default. You can deactivate Risks:

➢ Select the Risk you want to deactivate.

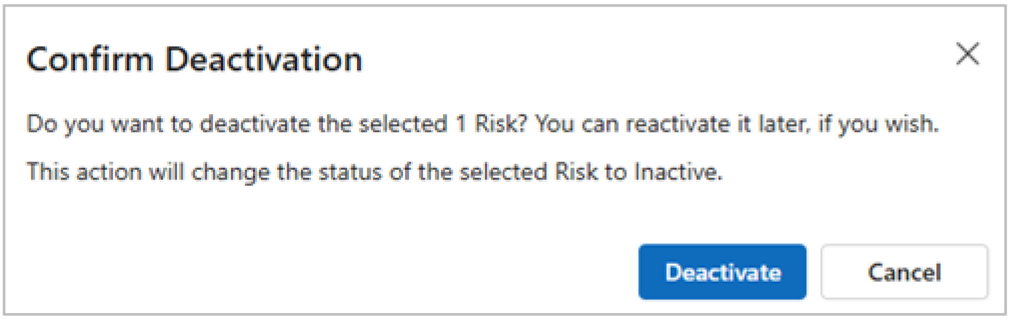
➢ Click on the Risk row to highlight it. (1)

➢ Click on *Deactivate*. (2)



▶ 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.*

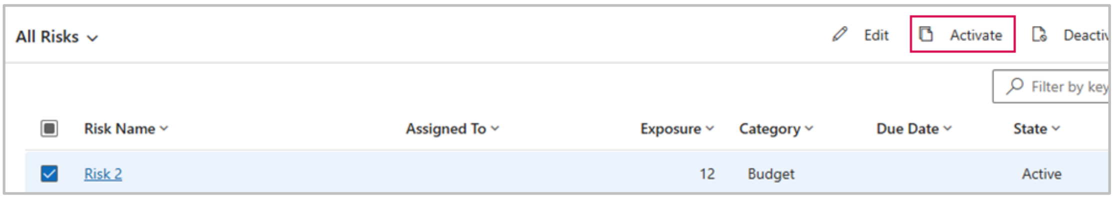
➢ Click the down arrow.

➢ Click on *Inactive Risks*.

Activate Risks:

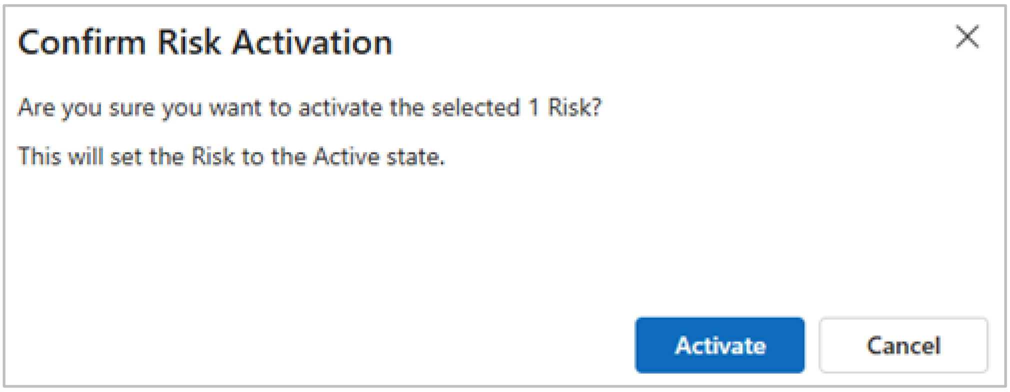
➢ Select the Risk as described above.

➢ Click on *Activate.*



► The *Confirm Risk Activation* field opens.

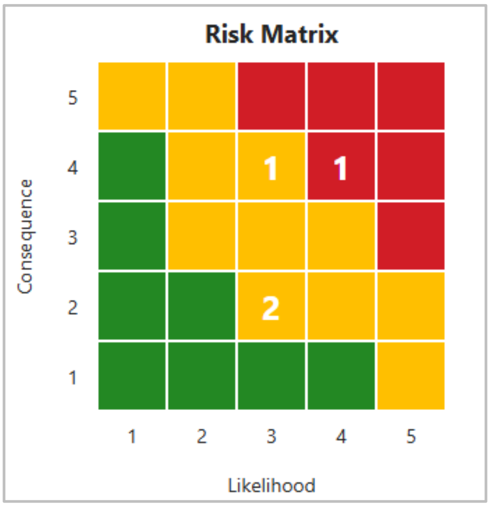
➢ Click on *Activate* to activate the Risk.



10.4 Risk Matrix

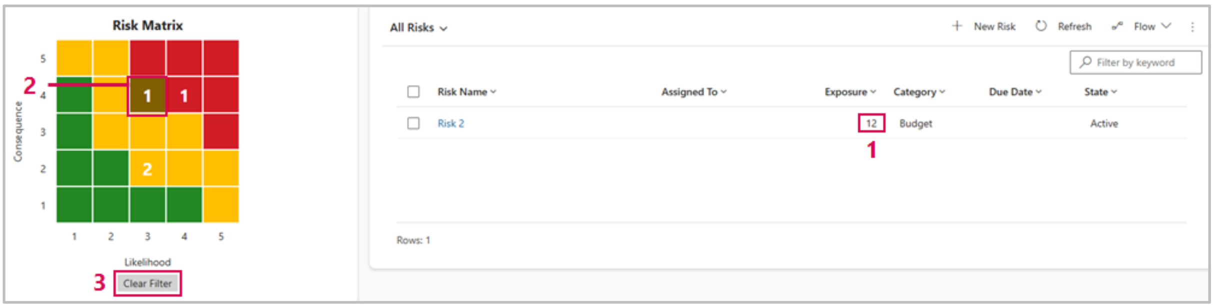
The *Risks* tab displays a Risk Matrix that shows the number of Risks per likelihood and consequence.

▶ 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:

Exposure = Likelihood * 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).

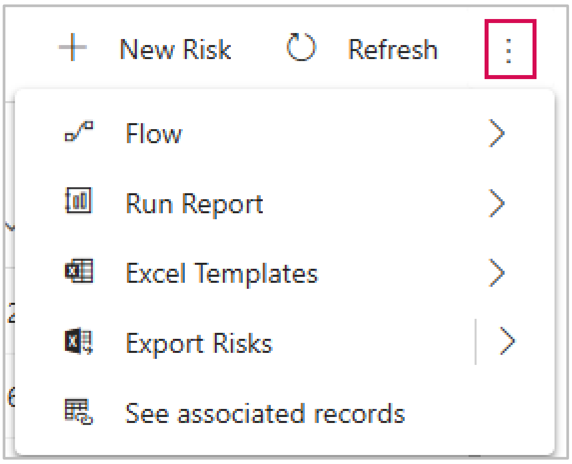
Or

➢ Click on *Clear Filter* (3).

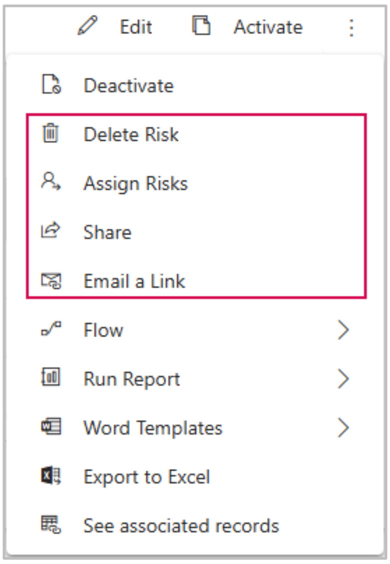
10.5 Additional Commands for Risks

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.

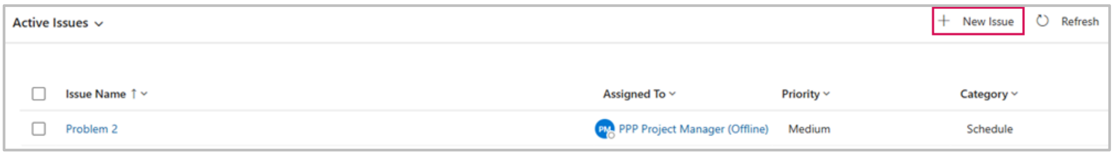
In this section, you will learn how to:

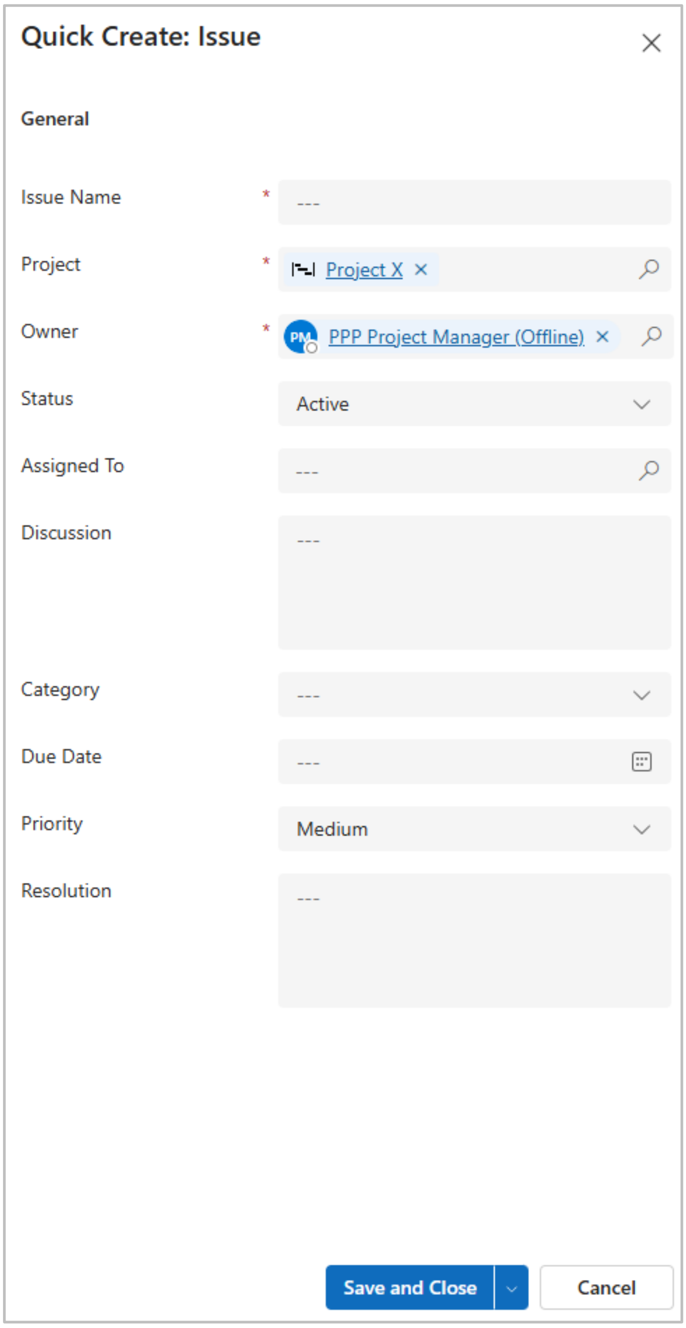
- Add Issues 139
- Edit Issues 143
- Deactivate and Activate Issues 144
- Use additional Commands for Issues 145

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.





➢ 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.

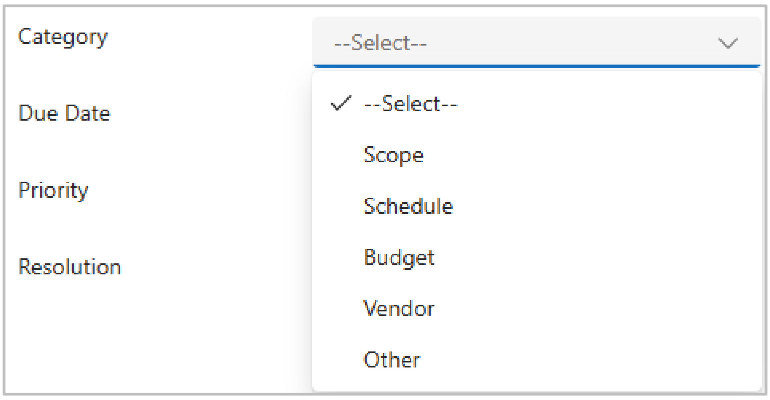
▶ You can select a different project or owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

  - *Status:*

    ➢ Click in the field and select the desired status from the drop-down menu.
  - *Assigned To:* Stakeholder to whom the risk is assigned.

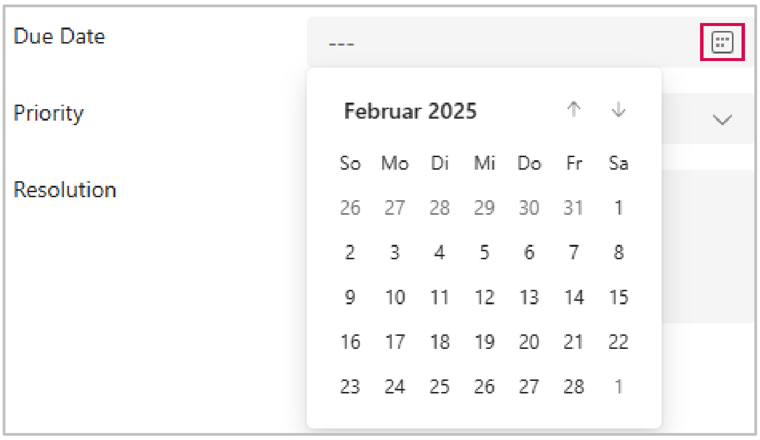
    ➢ Click on the input field, press the Enter key, and enter the desired name.
  - *Discussion:* Enter the discussion points for the Issue.
  - *Category:*

    ➢ 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.

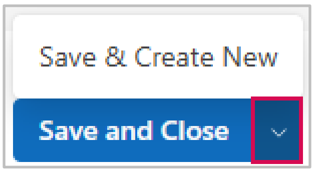
- *Resolution:*

  ➢ 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.

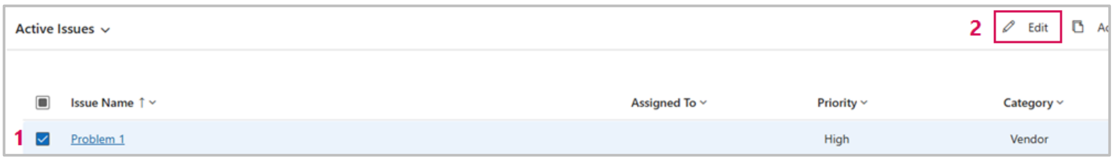
11.2 Edit Issues

An Issue can be edited as follows:

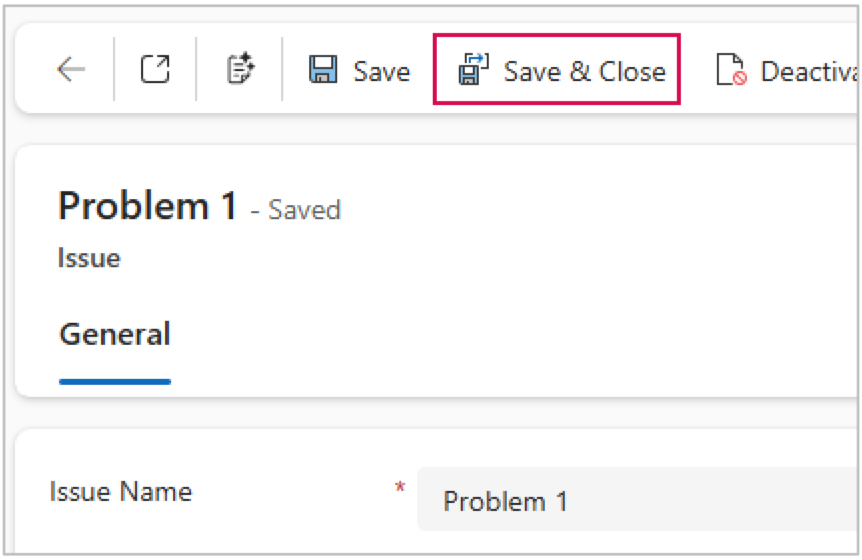
- Click on the preview in the *Issue Name* column. ▶ The form for editing the Issue opens.

Or

- Click on the row of the desired Issue 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.

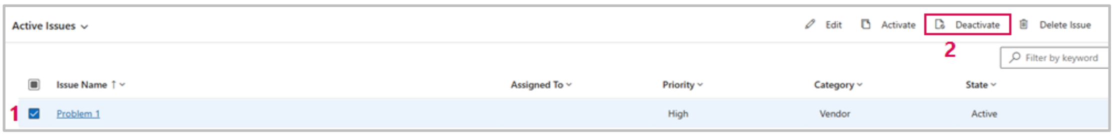


▶ Only Issues with the status Active can be edited. Deactivated Issues are locked for editing.

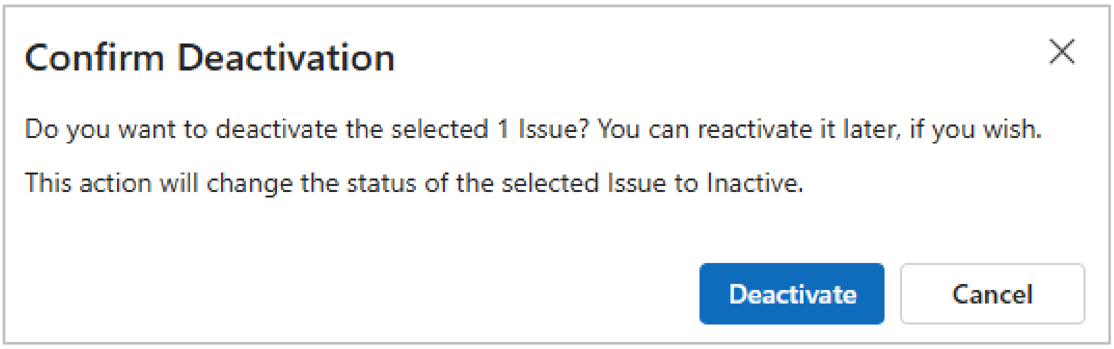
11.3 Deactivate and Activate Issues

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)



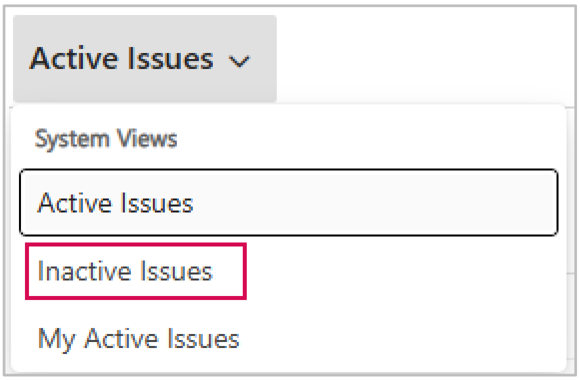
- ▶ The *Confirm Deactivation* field opens.
- Click *Deactivate* to deactivate the Issue.



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

Display only inactive Issues:

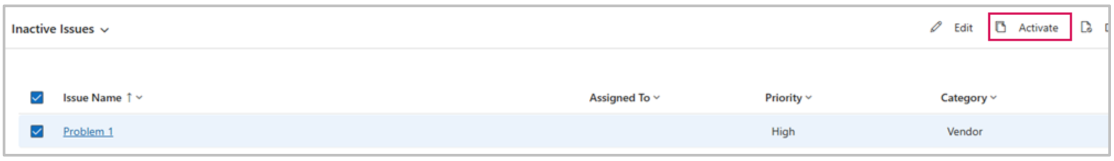
- Go to *Active Issues.*
- Click the down arrow.
- Click on *Inactive Issues*.



Activate Issues:

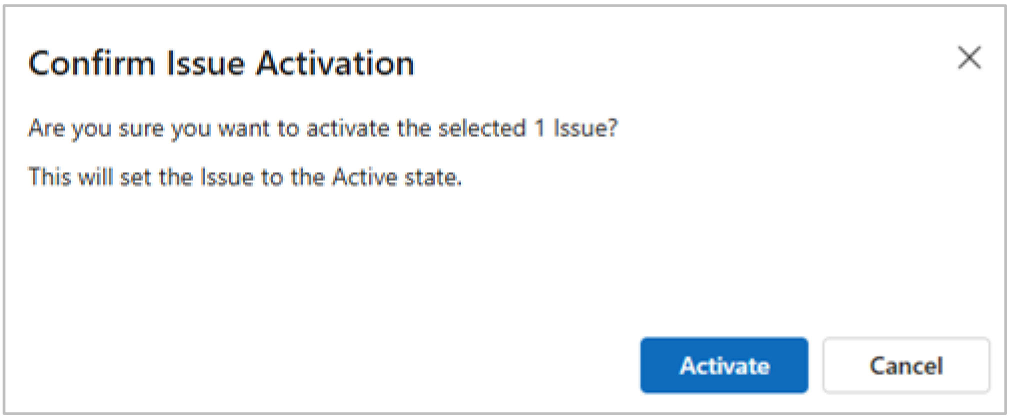
➢ Select the Issue as described above.

➢ Click on *Activate.*



▶ The *Confirm Issue Activation* field opens.

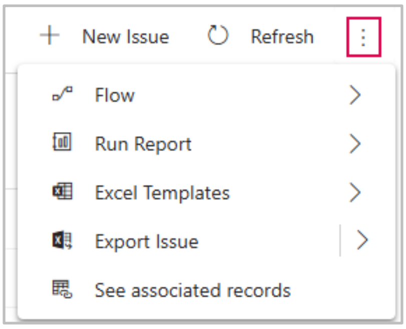
➢ Click on *Activate* to activate the Issue.



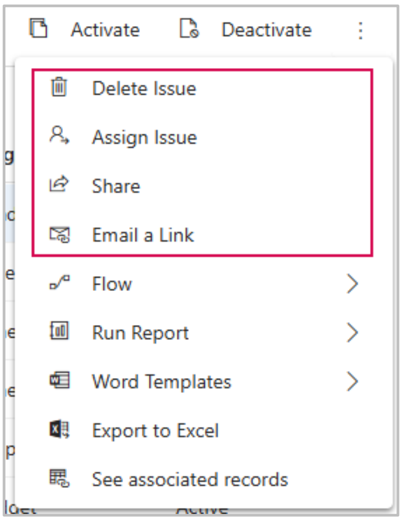
11.4 Additional Commands for Issues

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.

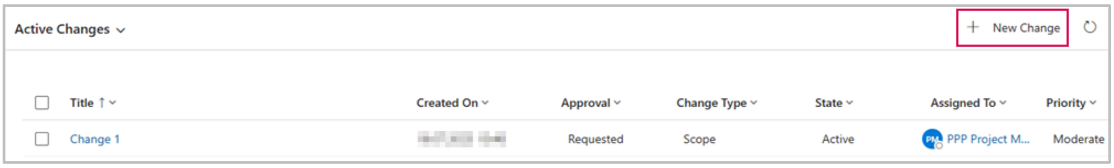
In this section, you will learn how to:

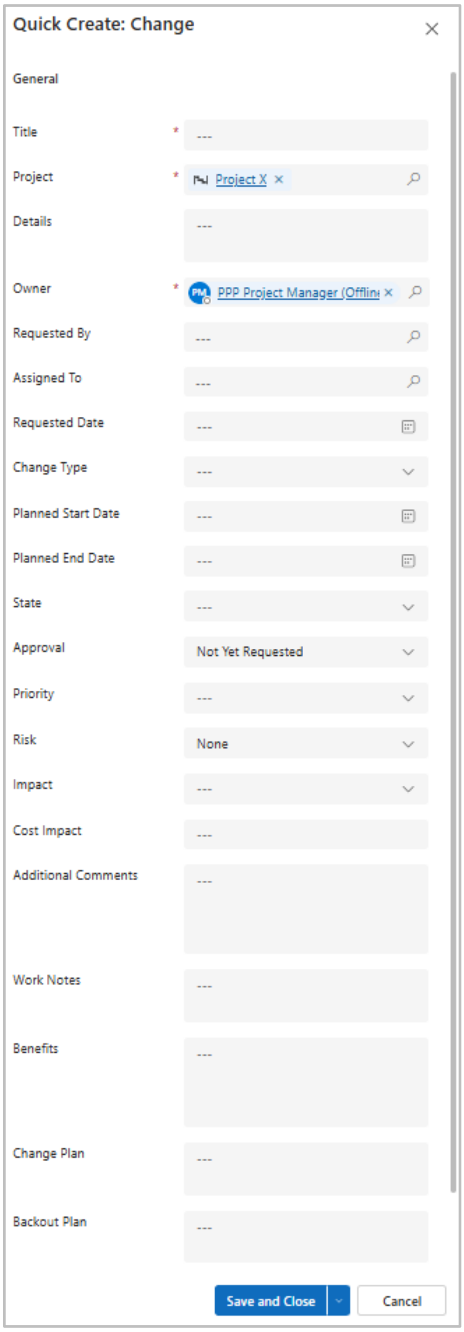
- Add Changes 147
- Edit Changes 153
- Deactivate and Activate Changes 154
- Use additional Commands for Changes 156

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.





- 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.

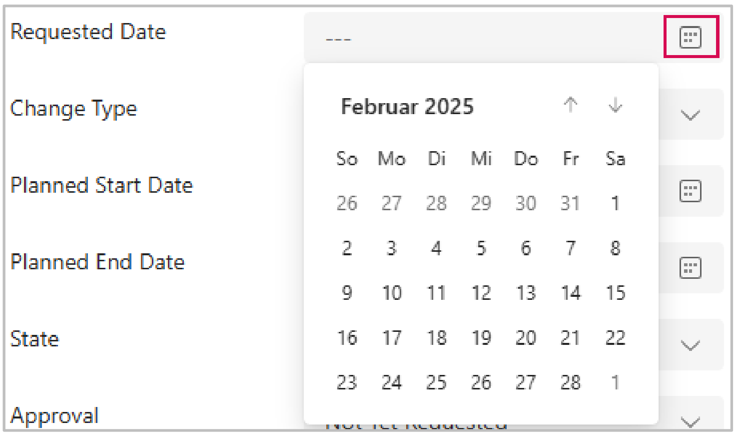
▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

- *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.

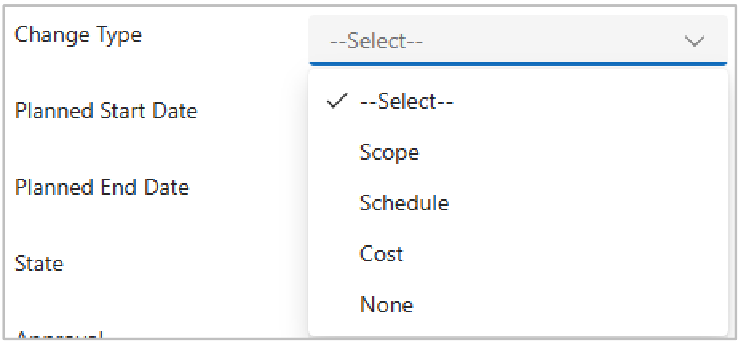
  ➢ Click on the input field, press the Enter key, and enter the desired name.
- *Requested Date, Planned Start Date, Planned End Date:*

  ➢ Click on the calendar icon and enter the date.



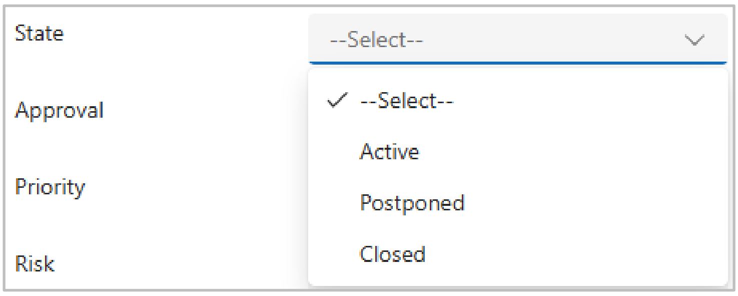
▪ *Change Type:*

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



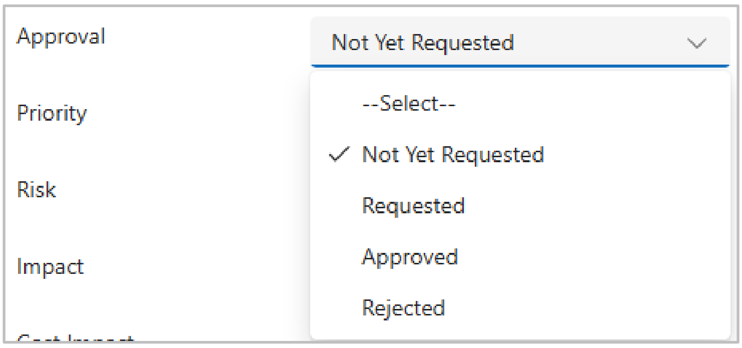
▪ *State*:

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



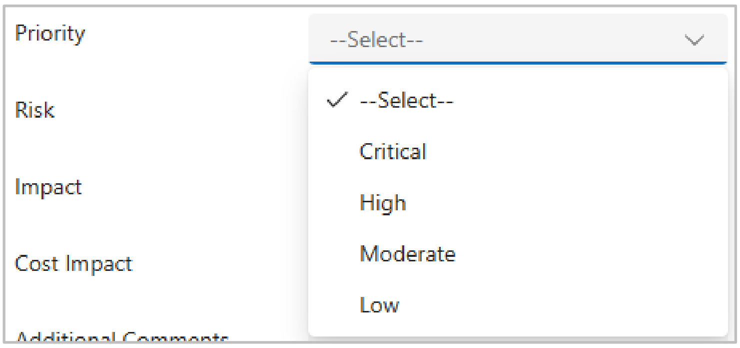
▪ *Approval:*

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



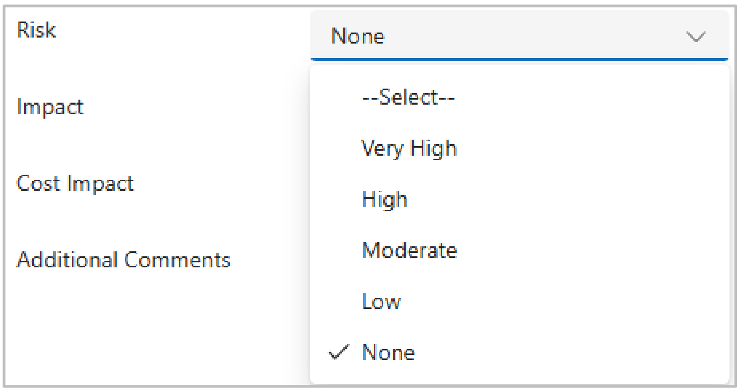
- *Priority:*

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



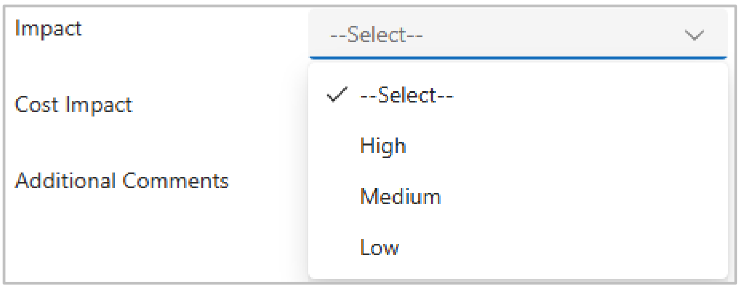
- *Risk:*

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



- *Impact:*

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



- *Cost Impact:*

➢ Enter an amount.

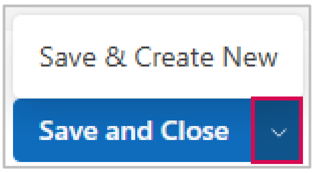
- *Additional Comments, Work Notes, Benefits, Change Plan, Backout Plan, Test Plan:*

  ➢ Enter meaningful descriptions in the appropriate fields. .

➢ Click *Save and Close*.

Or

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



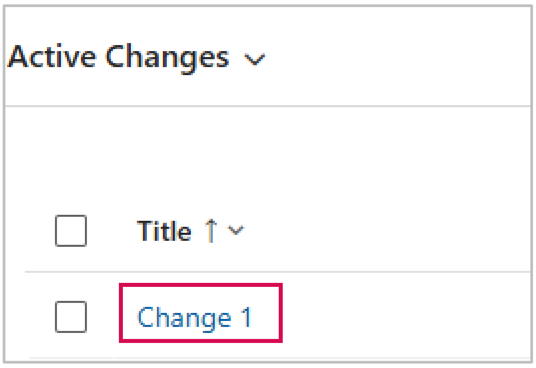
▶ A Change has been added.

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

12.2 Edit Changes

A Change can be edited as follows:

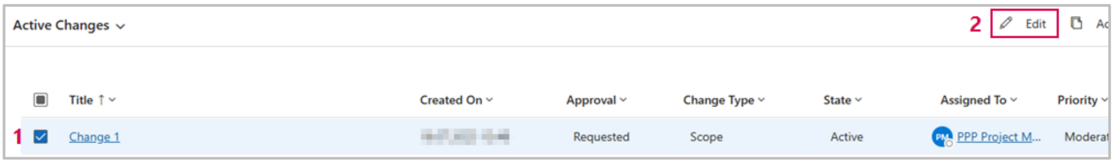
➢ Click on the preview in the *Title* column. ▶ The form for editing the Change opens.



Or

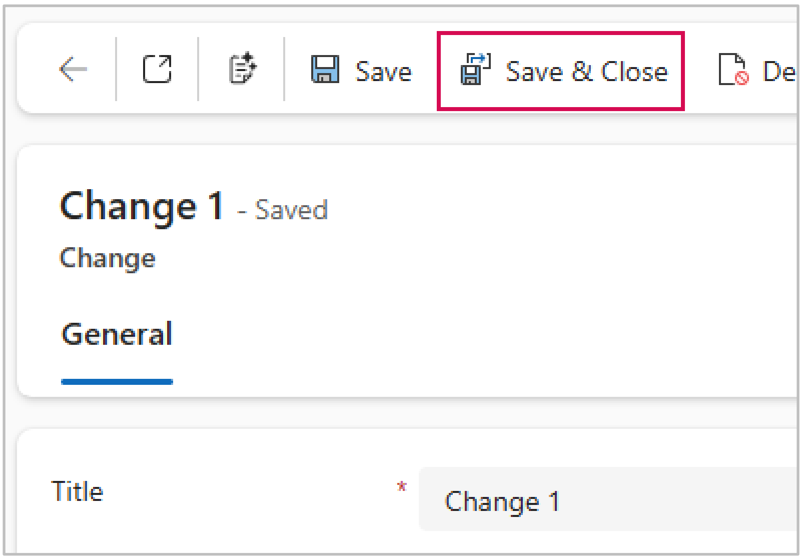
➢ Click on the row of the desired Change to select it. (1)

➢ Click on *Edit*. (2)



➢ Enter the desired change in the form.

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

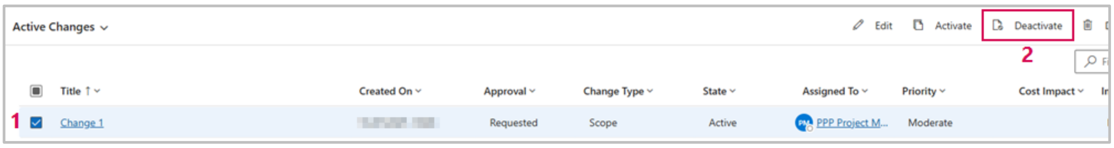


▶ Only Changes with the status Active can be edited. Deactivated Changes are locked for editing.

12.3 Deactivate and Activate Changes

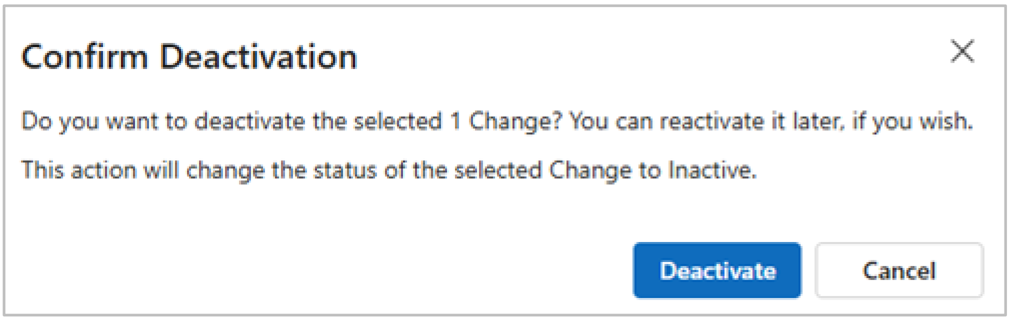
Changes are active by default. You can deactivate Changes:

- ➢ 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.

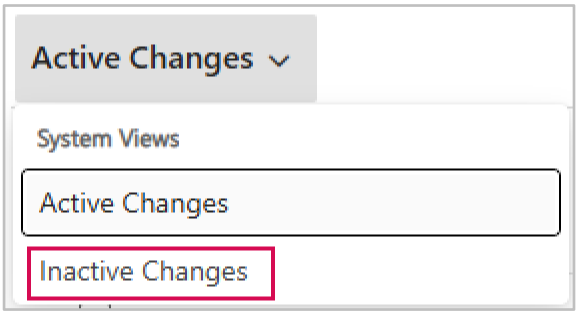


By default, all active and inactive Changes are listed in the table.

Display only inactive changes:

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

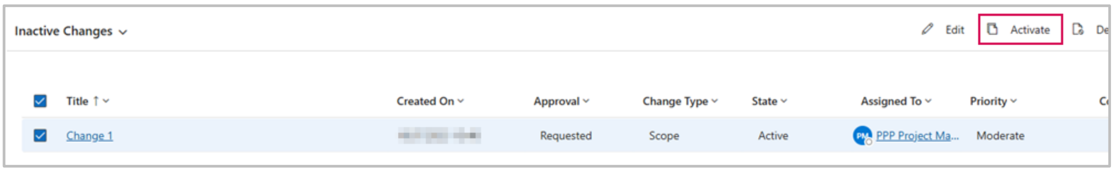
➢ Click on *Inactive Changes*.



Activate Changes:

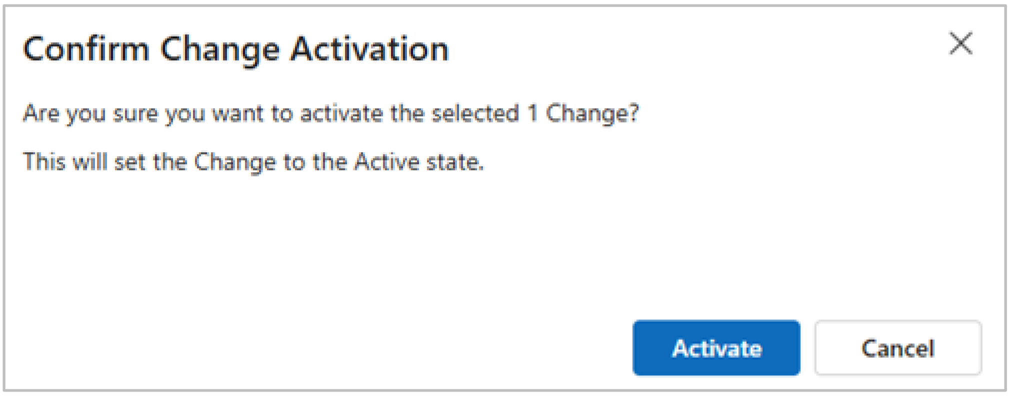
➢ Select the Change as described above.

➢ Click on *Activate.*



▶ The *Confirm Change Activation* field opens.

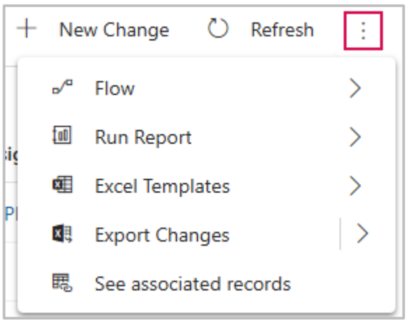
➢ Click on *Activate* to activate the change.



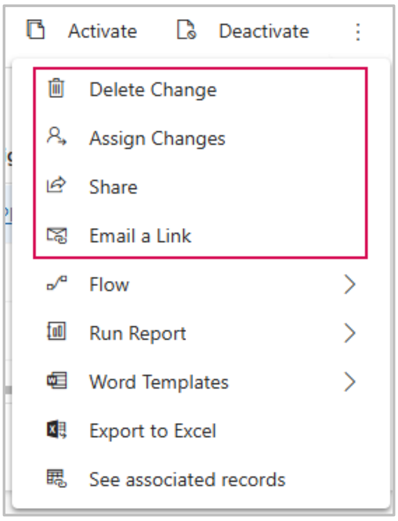
12.4 Additional Commands for Changes

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.

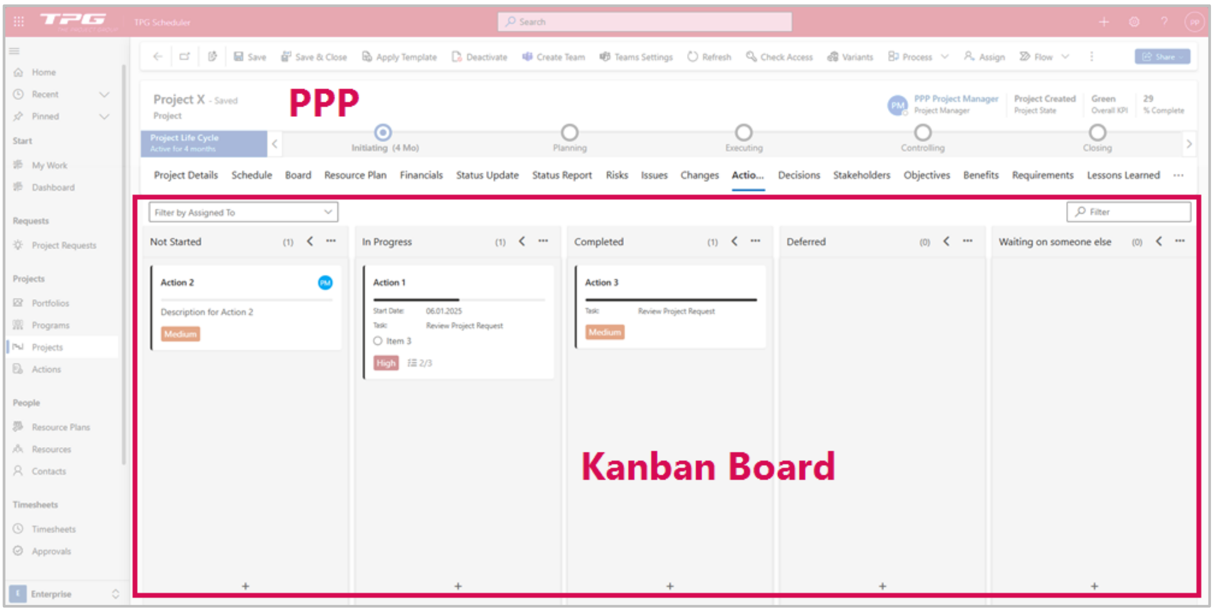
- *Assign Changes:* Changes the owner of the selected Change.
- *Share:* Shares the Change with selected individuals or teams without changing ownership.

- *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.

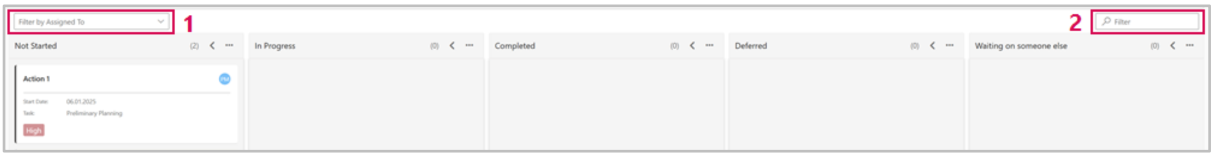


13.1 Actions - current Project

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.



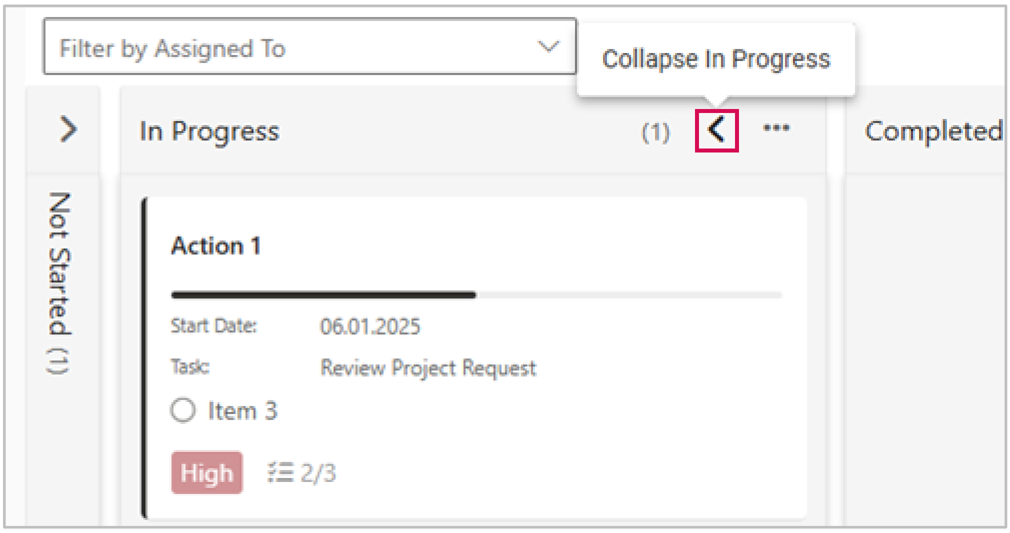
Two filter options are available:

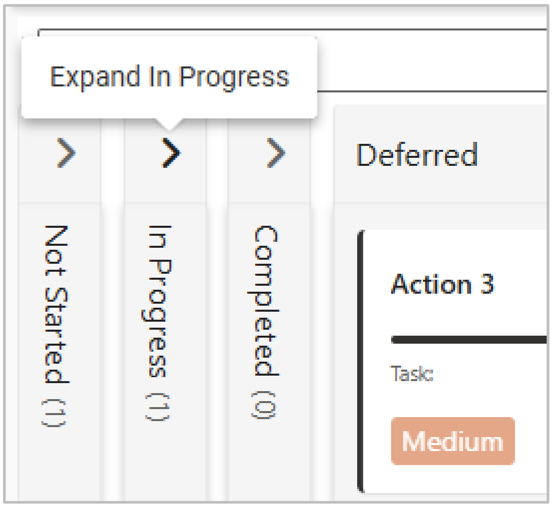
- Filter actions by assigned persons. (1)
- Actions by name and/or content. (2)

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.

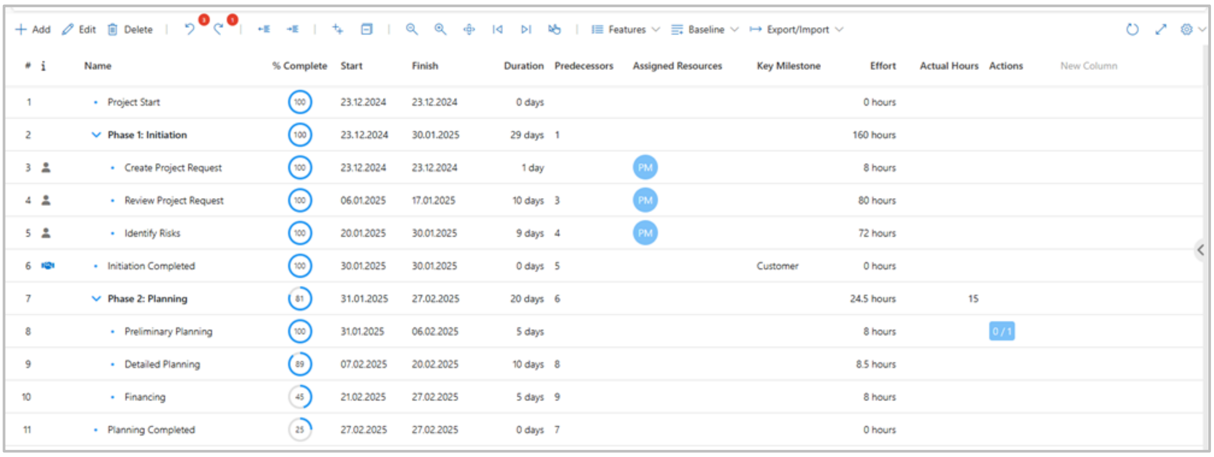
▶ The column will be collapsed or expanded.



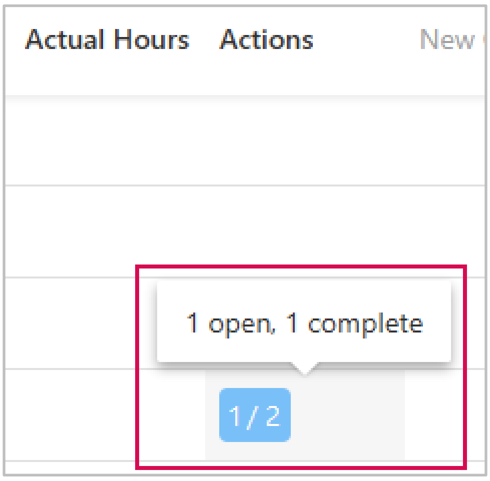


▶ The Actions can be assigned to tasks in the TPG Scheduler (*Schedule* tab). How to show columns is described under Task Attributes 56.

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



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

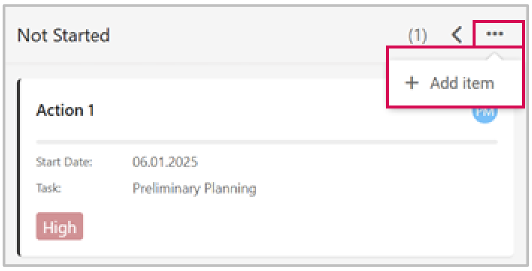


13.1.1 Create Actions

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*.

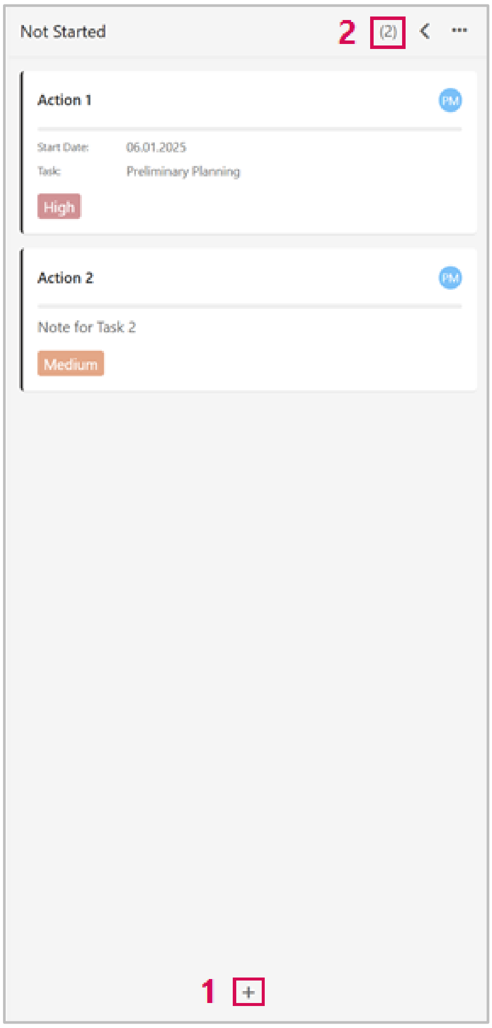


Or

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

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

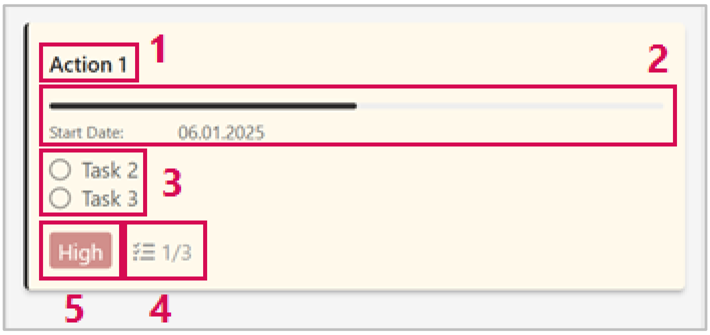
▶ The number of actions in the state column is updated automatically. (2)



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:

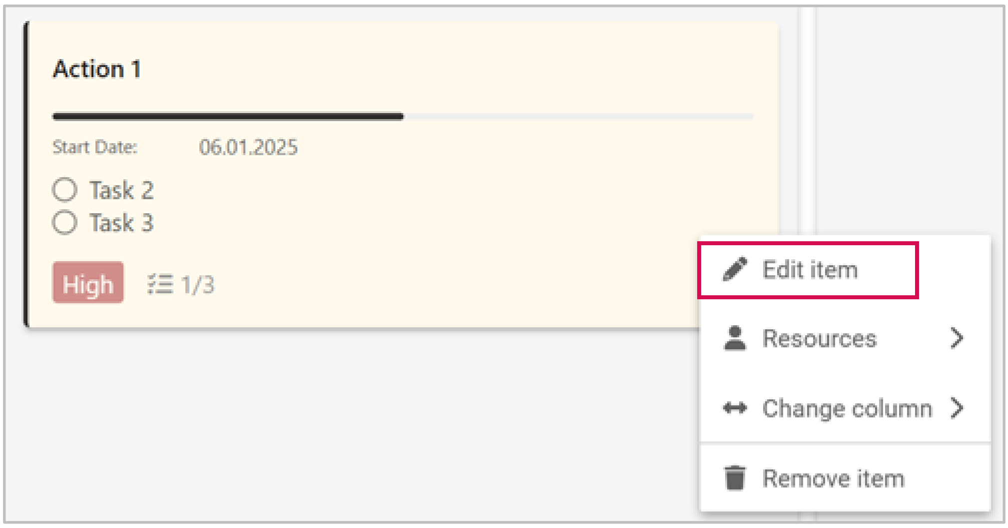
➢ Double-click on the action.

Or

➢ Right-click on the action. ▶ A drop-down menu opens.

➢ Click on *Edit item*.

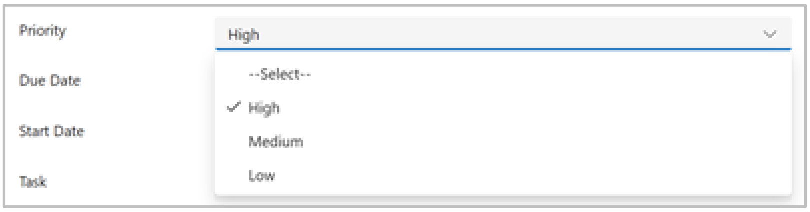
▶ The form for editing the action opens.



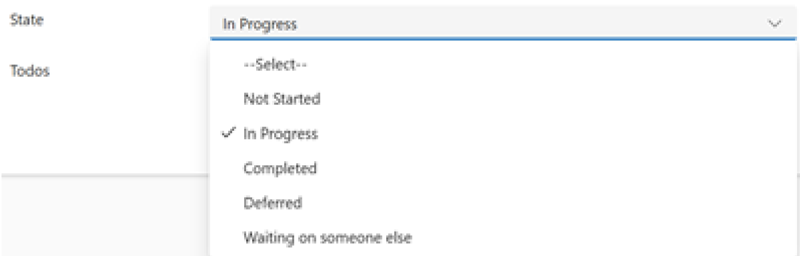
Fill in the following fields:

- *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*.



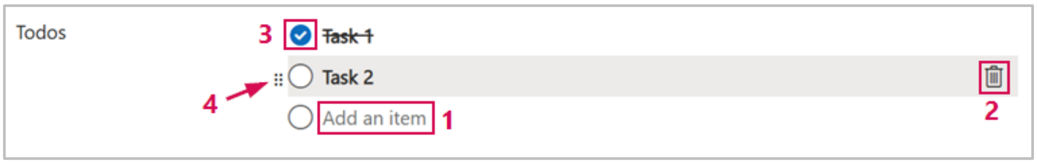
- *Due Date:*
  - Click in the text field. ▶ The calendar opens.
  - Select the due date of the action.
- *Start Date:*
  - Click in the text field. ▶ The calendar opens.
  - Select the start date of the action.
- *Task:* Assign a task to the action.
  - Click in the text field. ▶ A drop-down menu opens.
  - 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.



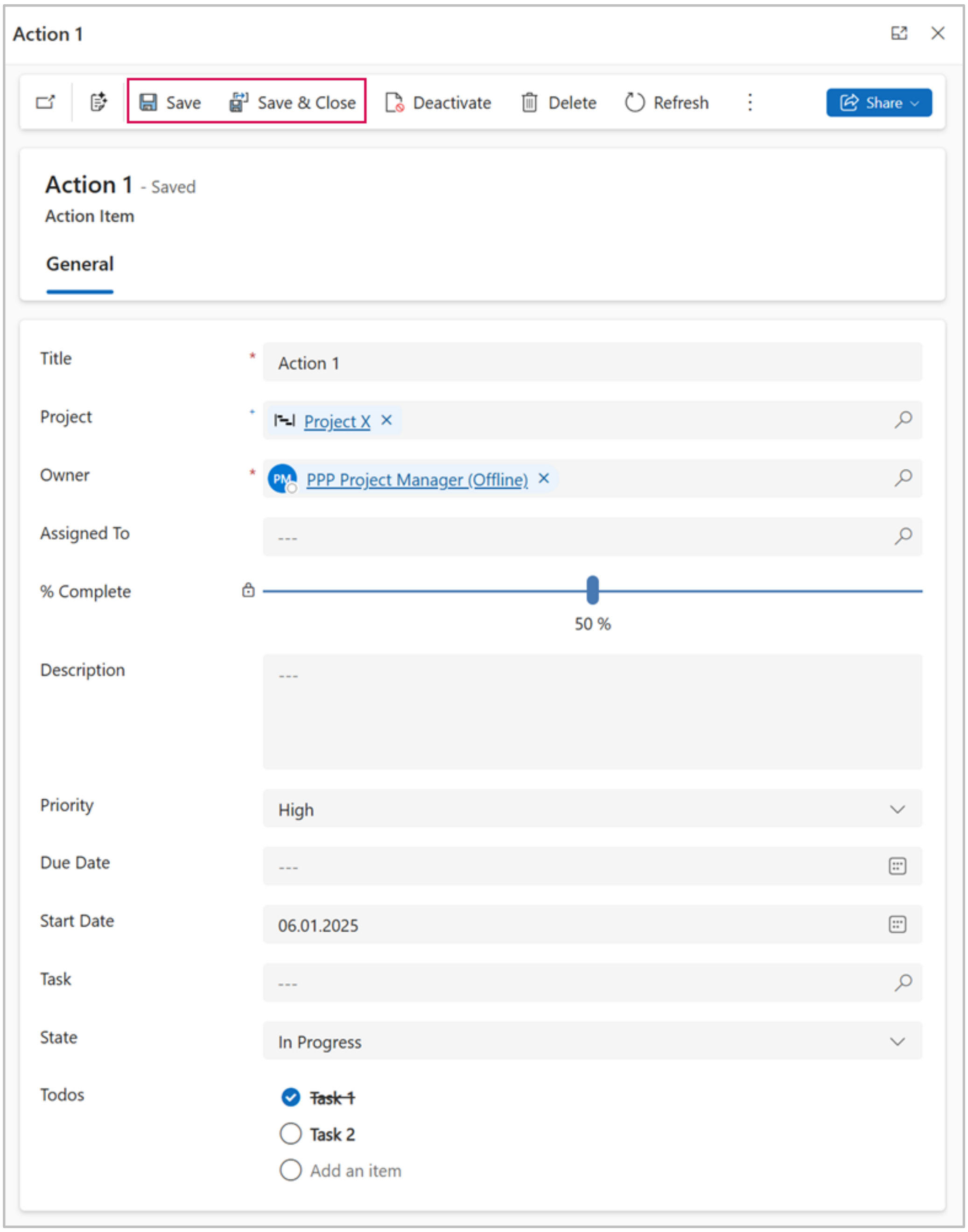
- *Todos:* Tasks within the action.
  - Click on *Add an item*. (1) ▶ A text field appears.
  - Enter the name of the task and confirm with the Enter key.
  - Click on the delete icon (2) to delete a task.

➢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

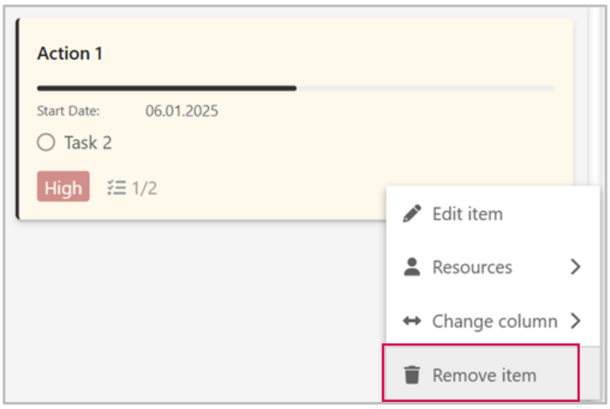
In the Kanban board on the *Action* tab, you can delete actions and move actions to another column to assign them a different state. (see Actions - current Project 158)

Delete action:

➢ Select the action you want to delete.

➢ Right-click on the action. ▶ A drop-down menu opens.

➢ Click on *Remove item.*



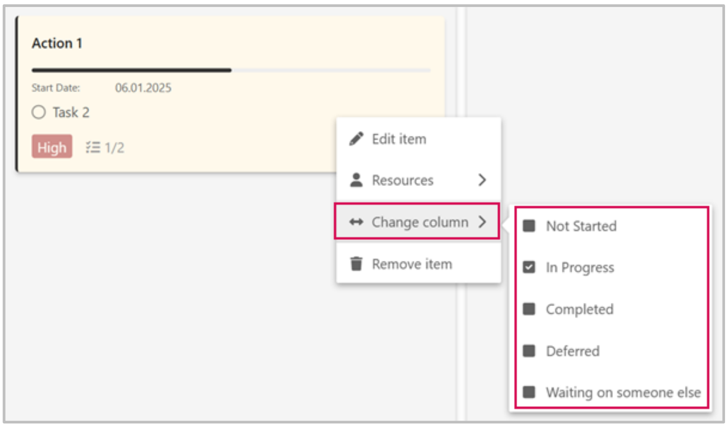
Move actions:

➢ Select the action you want to move.

➢ Right-click on the action. ▶A drop-down menu opens.

➢ Go to *Change Column*.

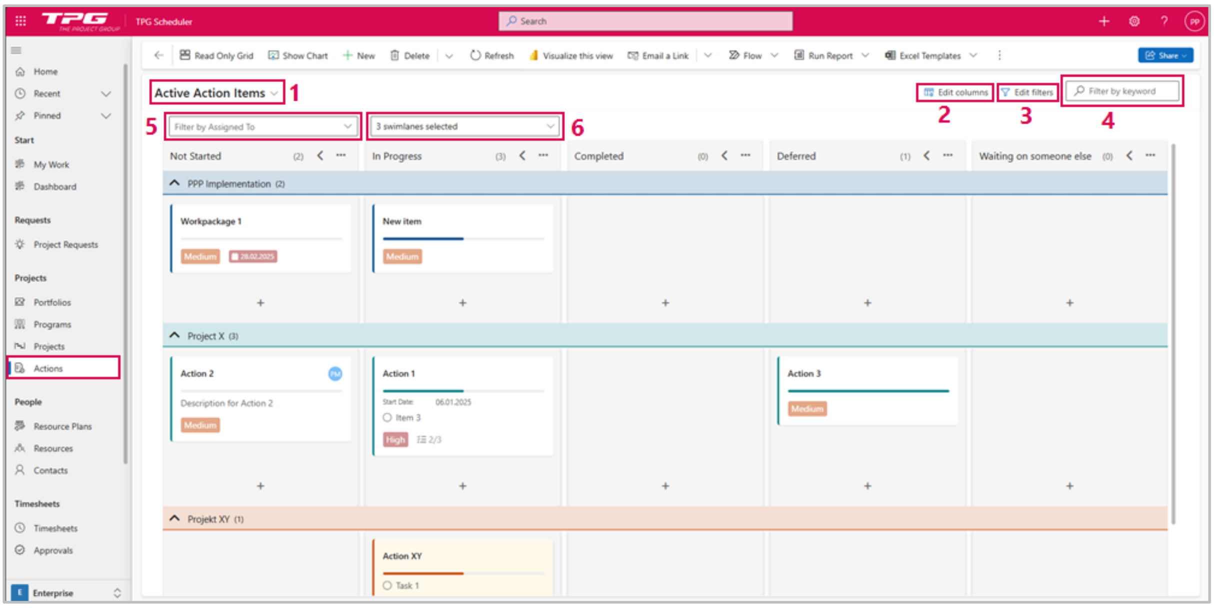
➢ Click on the desired state.



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.

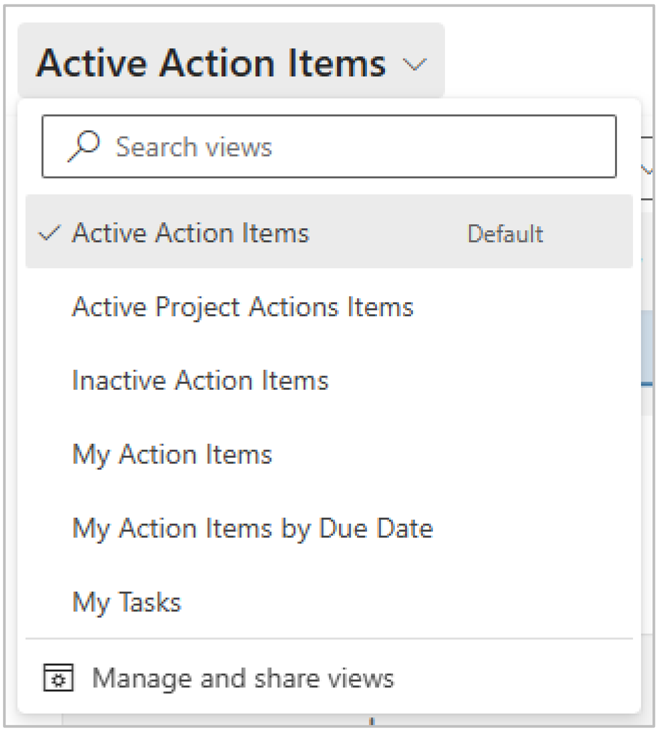


There are options available to you to customize the view:

- Selection menu of displayed Actions (1):

  ➢ Click on the down arrow. ▶ A drop-down menu opens.

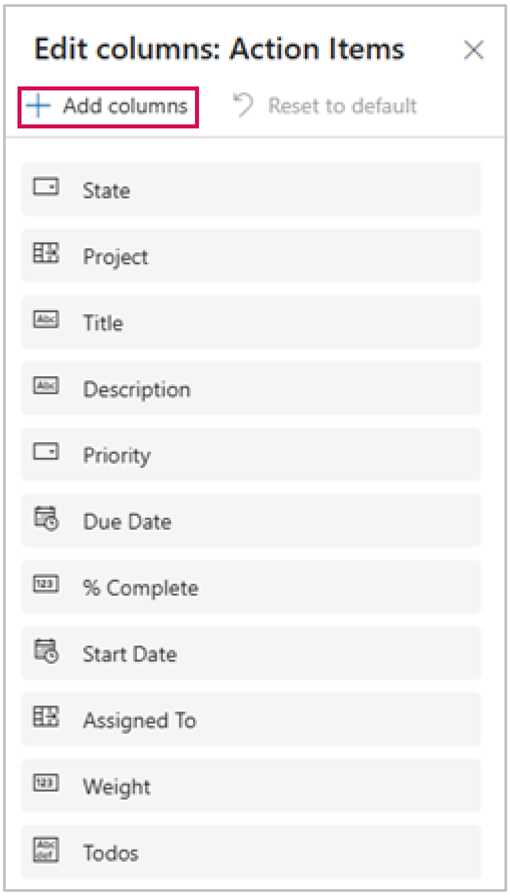
➢Click on the desired display option.



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

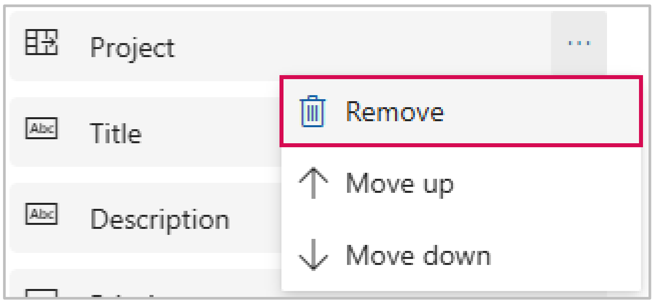
➢Click on *Edit columns*. (2) ▶ A form opens.

➢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.



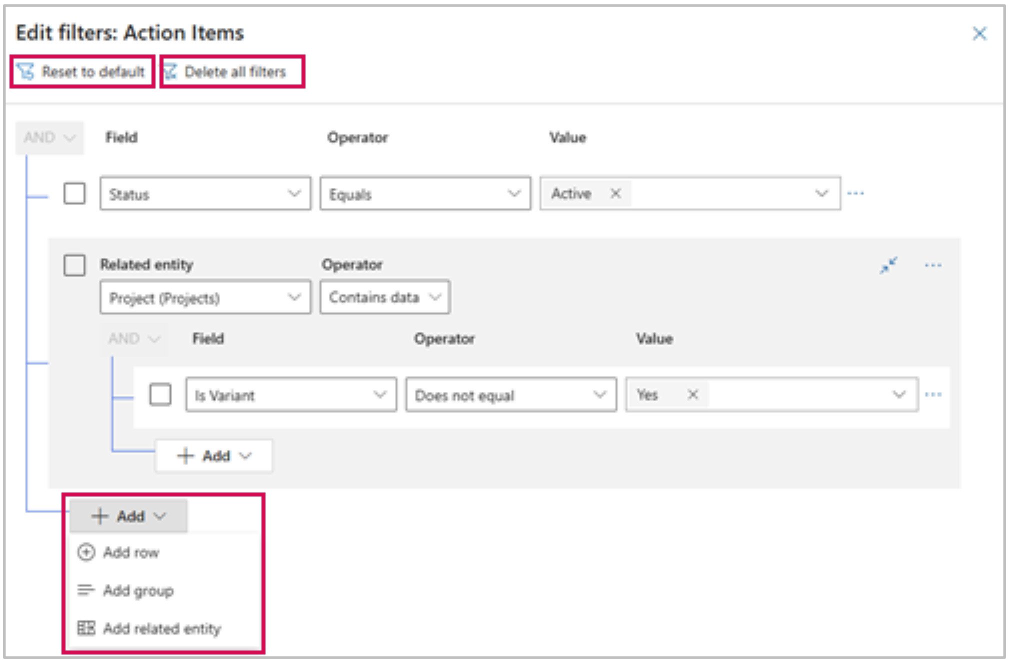
➢Click *Reset to default* to restore the default settings.

➢Click on *Apply* to apply the changes to the view.

- *Edit filters* (3): Filter options for displayed action items.

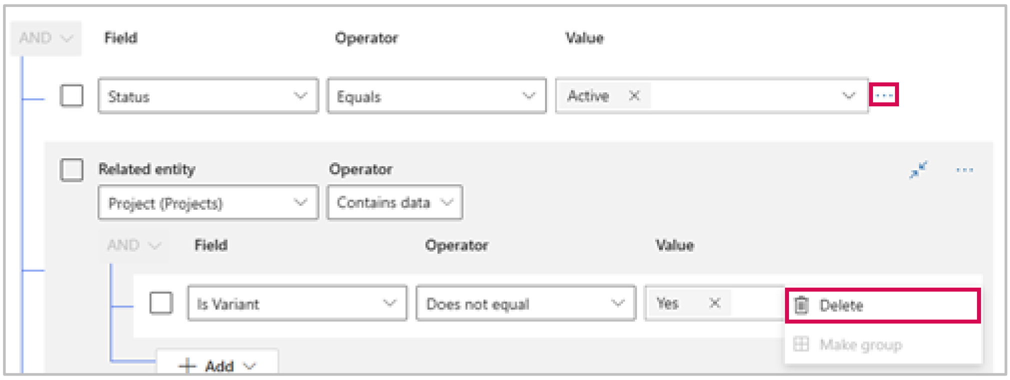
➢Click on *Add*. ▶ A drop-down menu opens.

➢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.

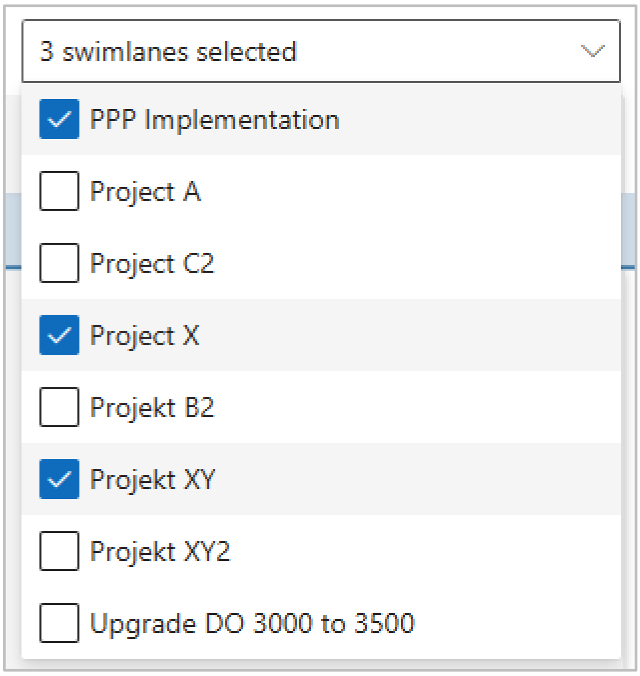
  ➢ Click on the *Filter by Assigned To* field. ▶ A drop-down menu opens.

  ➢ 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 172)

  ➢ Click on the *swimlanes selected* field. ▶ A drop-down menu opens.

  ➢ Select the projects that you want to display on the Kanban board.

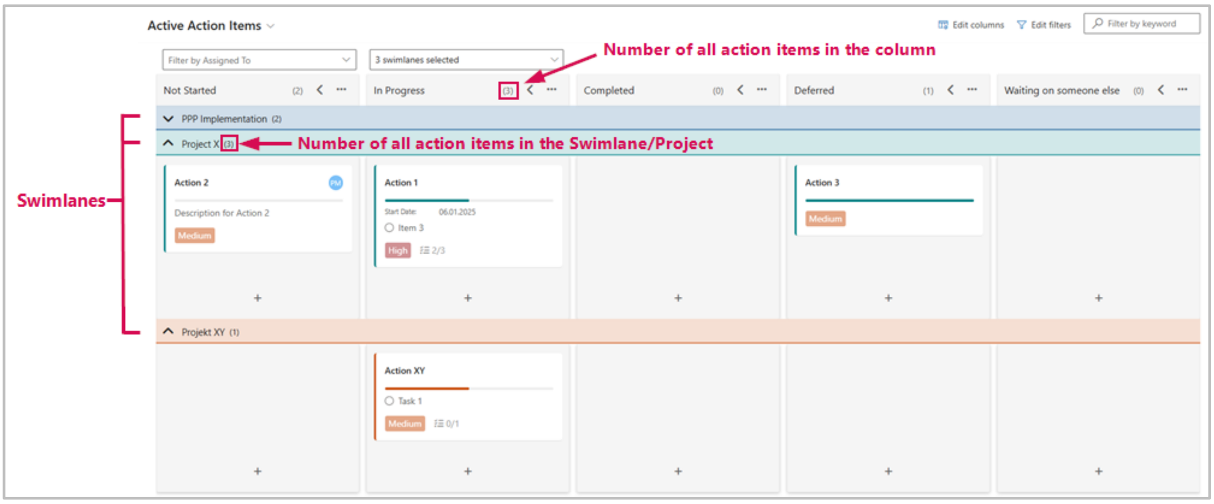


13.2.1 Actions - show across projects

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.

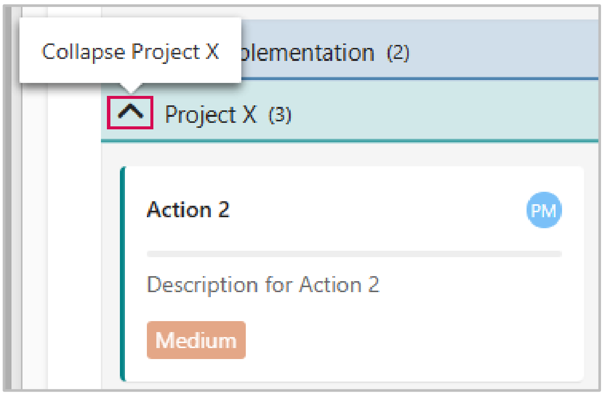
Swimlane = line in which all action items of a project are displayed.

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



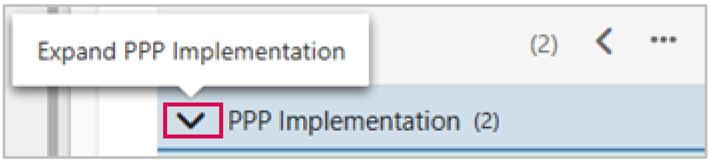
For a better clarity, you can expand and collapse the action items of a swimlane:

➢ 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 158)

13.2.2 Actions - create and edit across projects

Creating actions in the cross-project Kanban board:

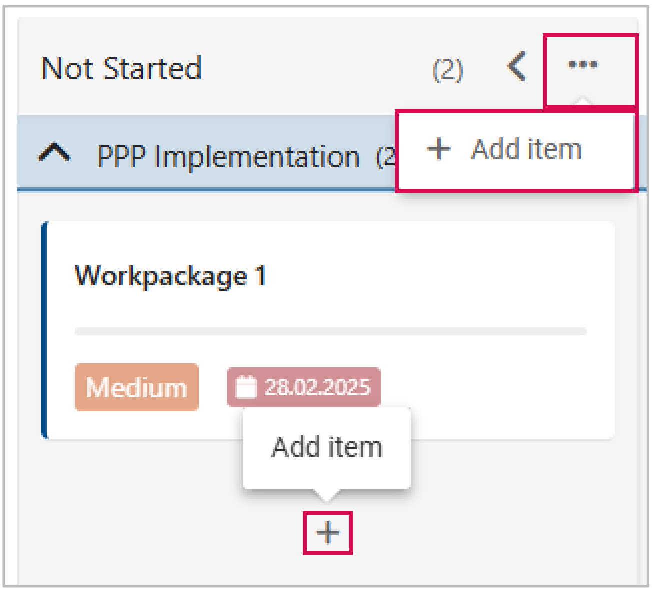
There are two ways to create an action in the cross-project Kanban board:

➤ 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 174)



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 162.

13.2.3 Actions - delete and move across projects

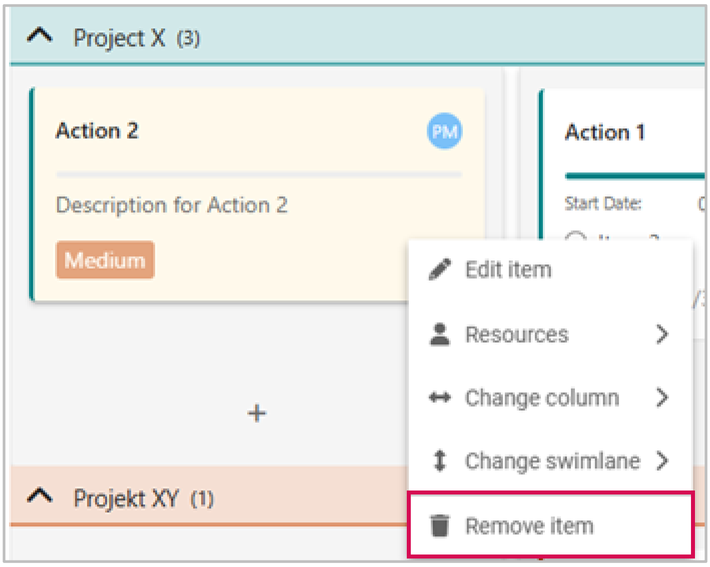
In the Kanban board for cross-project actions, you can assign actions to a different state or project and delete actions.

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.

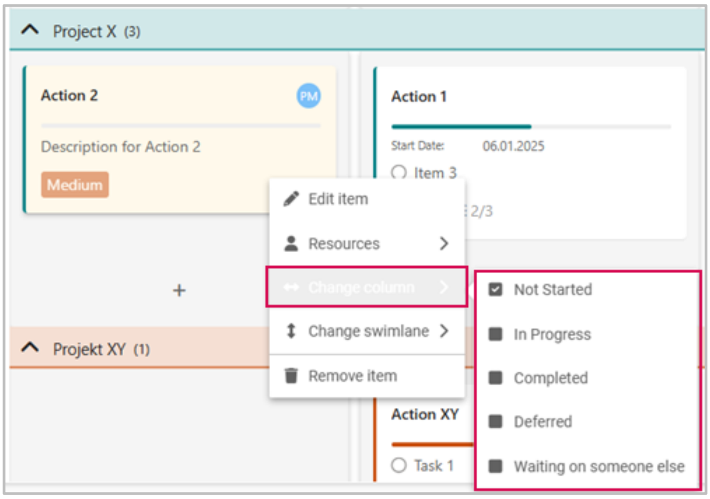
➢ Move the action to the desired column and swimlane using drag & drop.

Or

➢ Right-click on the action. ▶ A drop-down menu opens.

➢ Go to *Change column*.

➢ Click on the desired column.

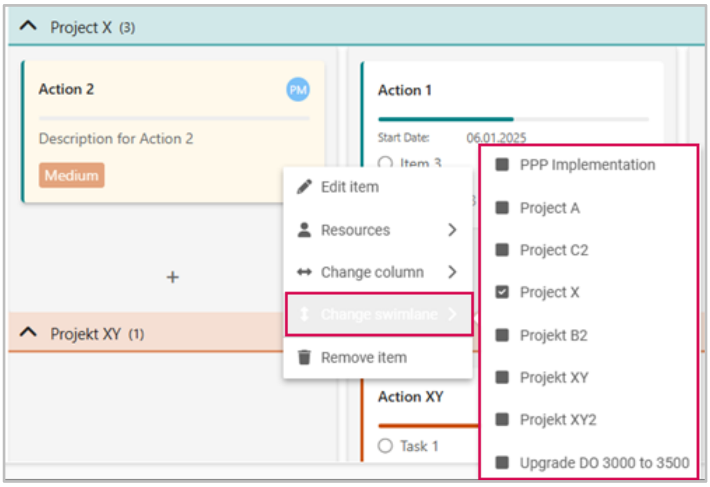


Or

➢ 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.

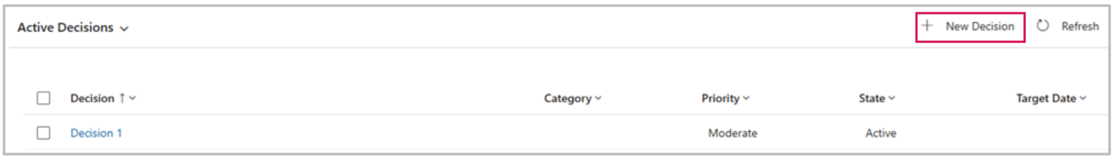
In this section, you will learn how to:

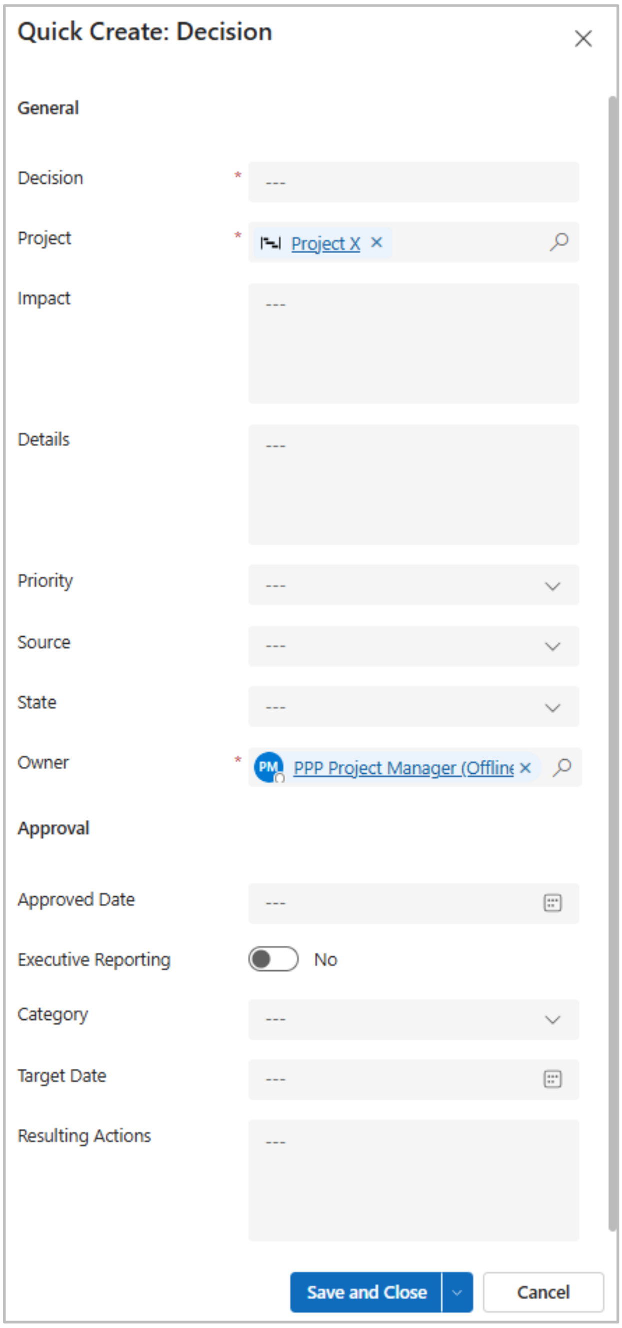
- Add Decisions 177
- Edit Decisions 181
- Deactivate and Activate Decisions 182
- Use additional Commands for Decisions 184

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.





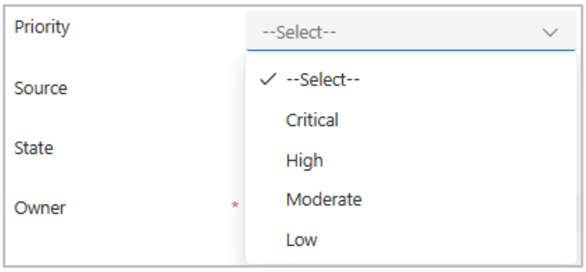
- Fill out the form:

▶ 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:*

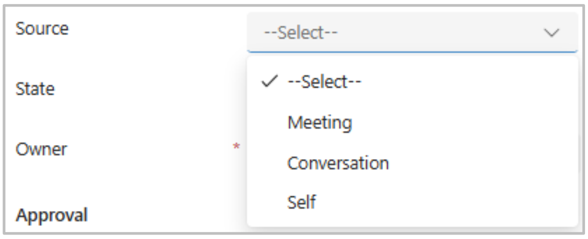
    ➢ Enter a meaningful description of the impact and details of the Decision.
  - *Priority:*

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



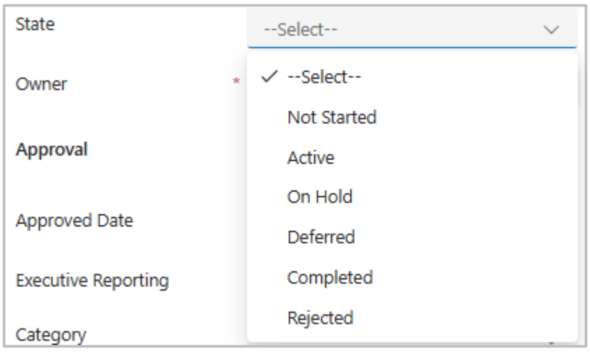
  - *Source:*

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



  - *State*:

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

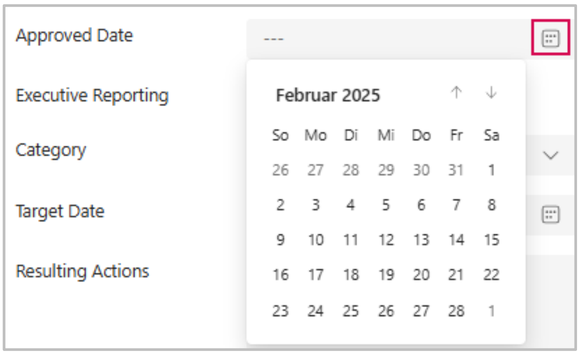


  - *Owner*: Creator of the Decision. By default, the current user is entered.

▶ 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.

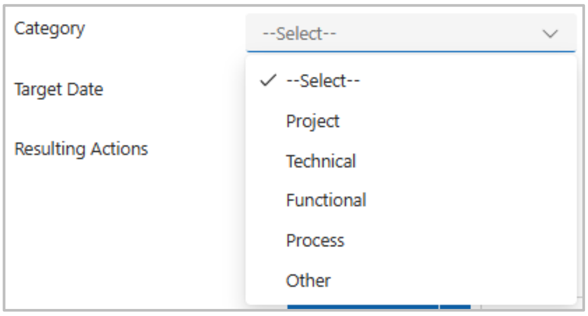


  - *Executive Reporting*: Create a report for management. *No* is selected by default..

➢ 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.

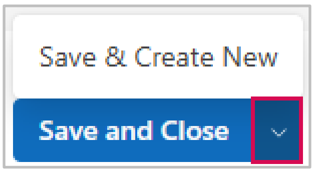
  - *Resulting Actions:*

➢ 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.

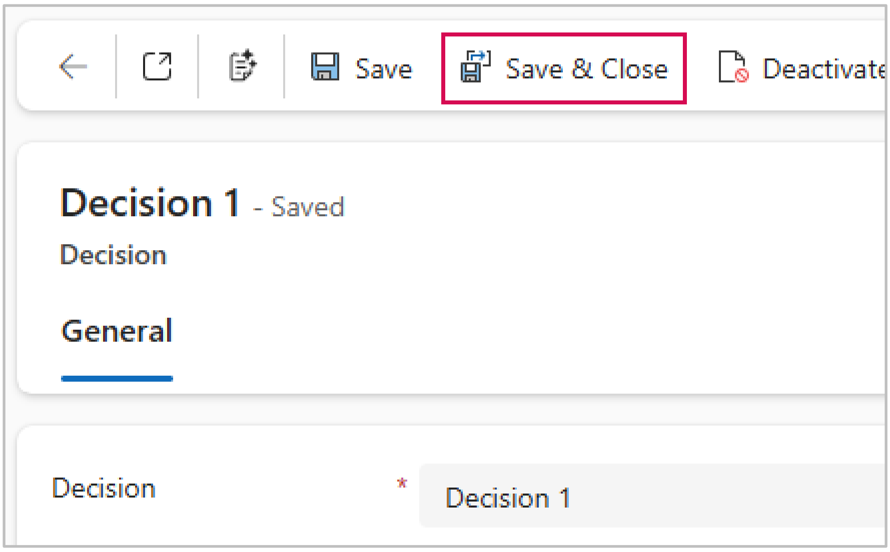
Or

➢ 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.

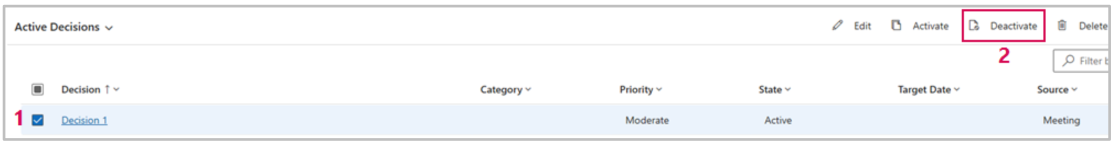
14.3 Deactivate and Activate Decisions

Decisions are active by default. You can deactivate Decisions:

➢ Select the Decision you want to deactivate.

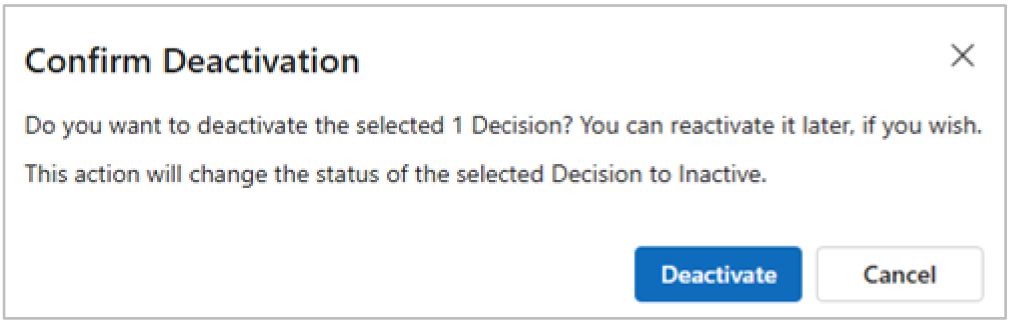
➢ Click on the Decision row to highlight it. (1)

➢ Click on *Deactivate*. (2)



▶ The *Confirm Deactivation* field opens.

➤ Click *Deactivate* to deactivate the Decision.



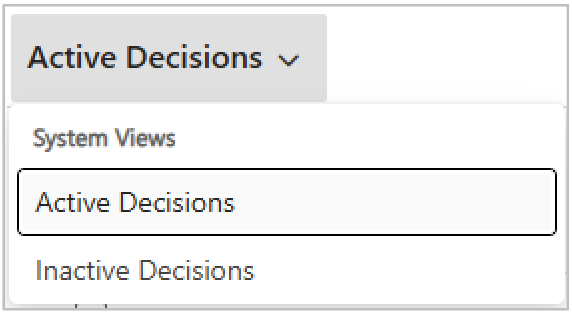
By default, all active and inactive Decisions are listed in the table.

Display only inactive Decisions:

➤ Go to *Active Decisions.*

➤ Click the down arrow.

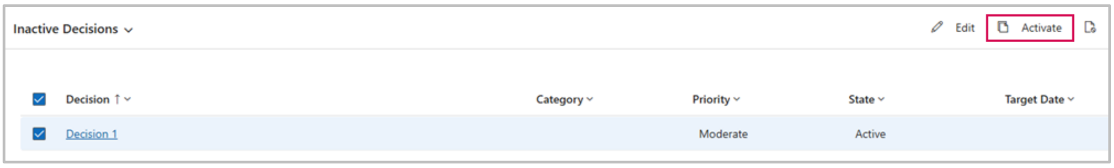
➤ Click on *Inactive Decisions*.



Activate Decisions:

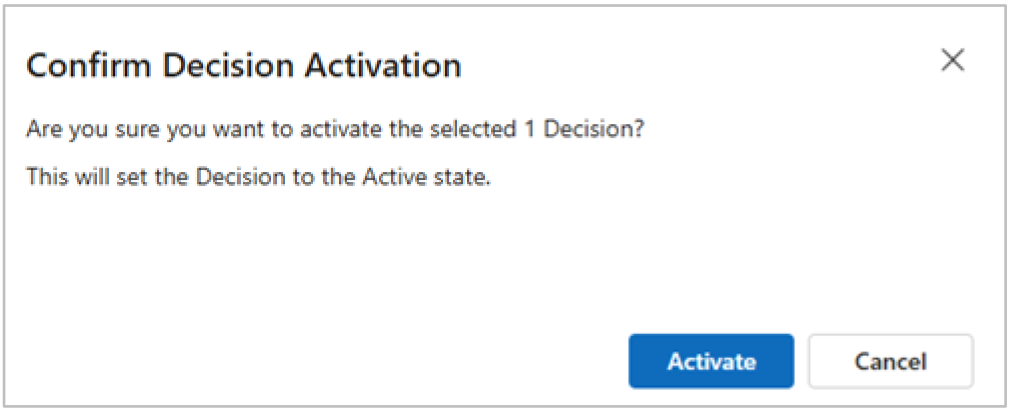
➤ Select the Decision as described above.

➤ Click on *Activate.*



▶ The *Confirm Decision Activation* field opens.

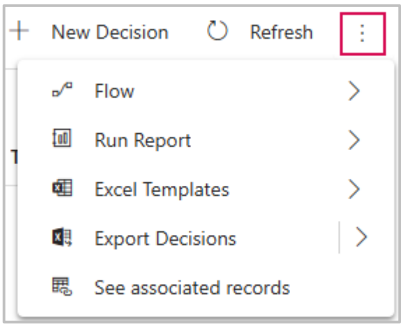
➢ Click on *Activate* to activate the Decision.



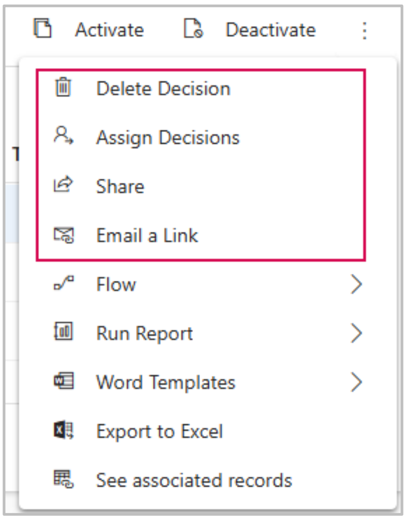
14.4 Additional Commands for Decisions

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.

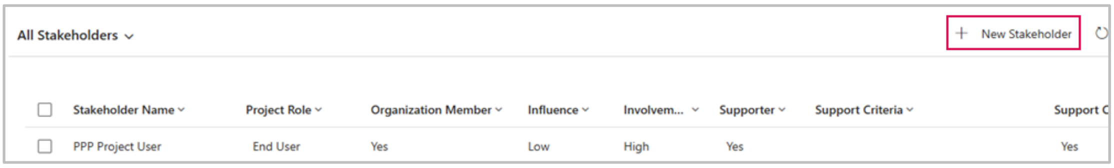
In this section, you will learn how to:

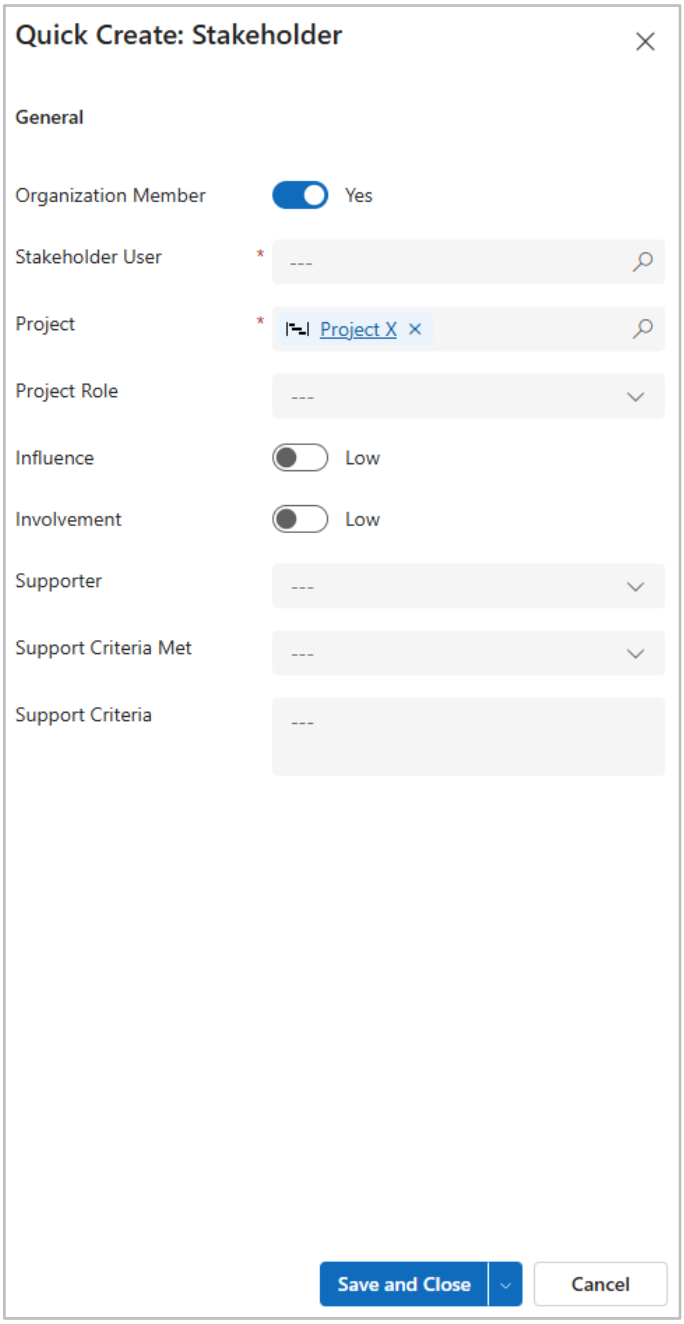
- Add Stakeholders 186
- Edit Stakeholders 190
- Deactivate and Activate Stakeholders 191
- Use additional Commands for Stakeholders 192

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.

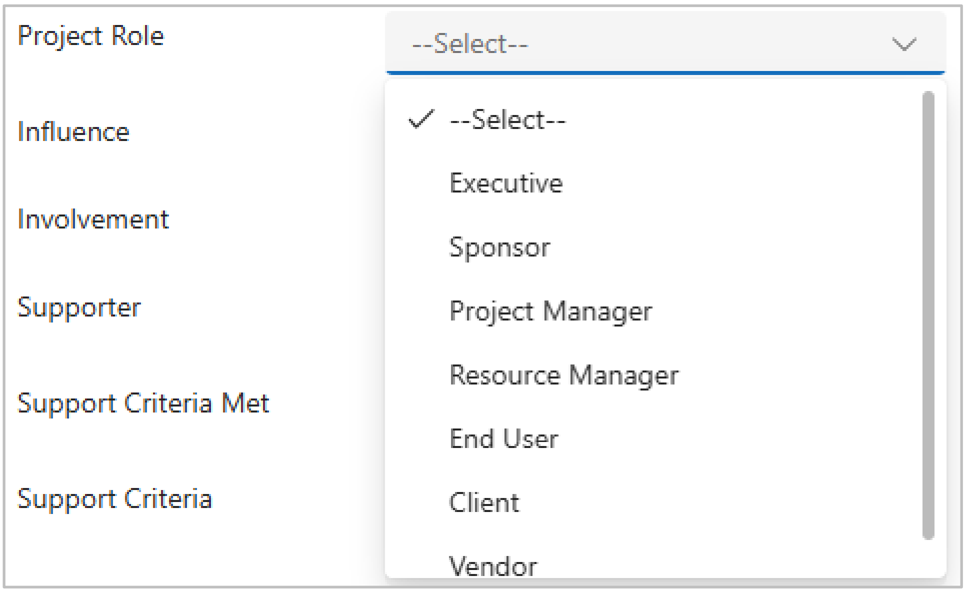




- Fill out the form:

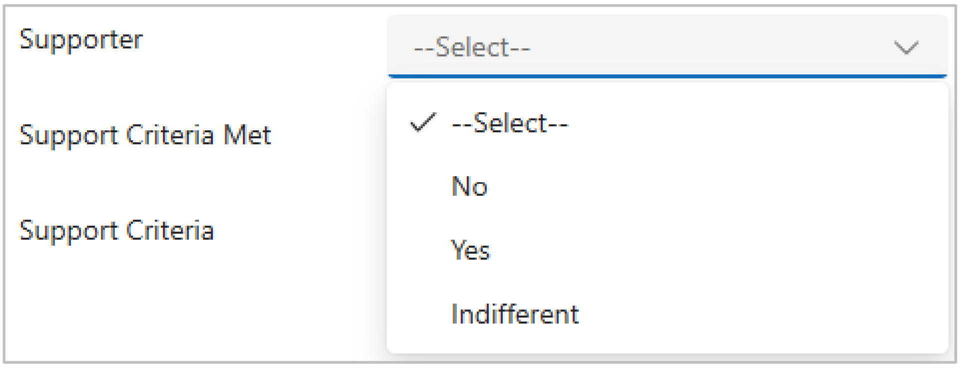
▶ To add a Stakeholder, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- *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.



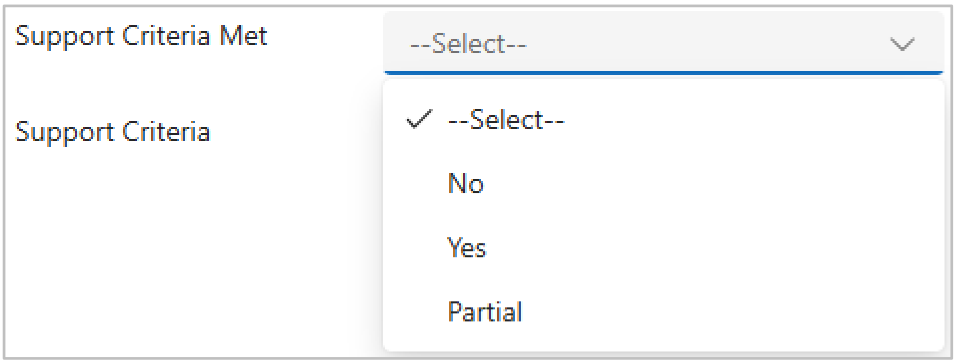
  - *Influence:* Influence of the Stakeholder on the project. *Low* is selected by default..
    - ➢ Click on the slider to select *High*.
  - *Involvement:* Involvement of the Stakeholder in the project. *Low* is selected by default.
    - ➢ Click on the slider to select *High*.
  - *Supporter:* Support of the Stakeholder in the project.

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



- *Support Criteria Met:*

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



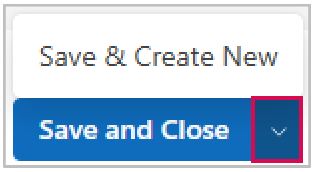
- *Support Criteria:*

➢ 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.



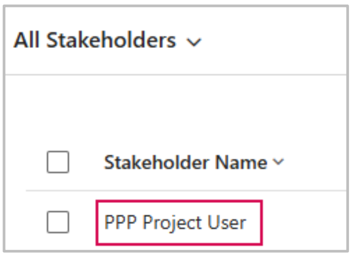
▶ A Stakeholder is added.

▶ The stakeholder appears in the *All Stakeholders* table.

15.2 Edit Stakeholders

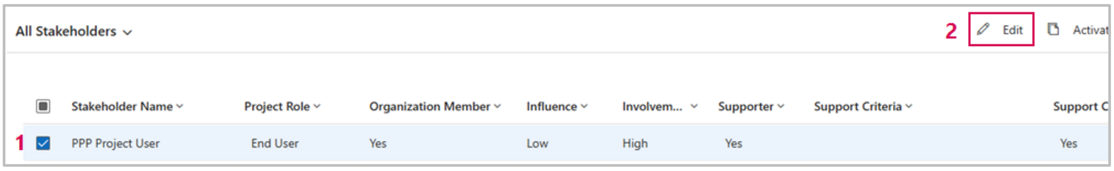
A Stakeholder can be edited as follows:

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

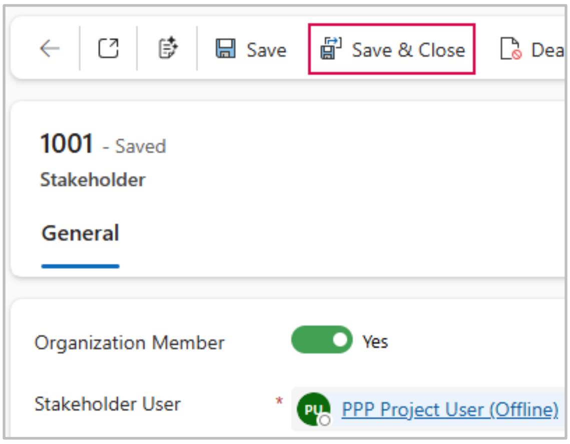


Or

- 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.

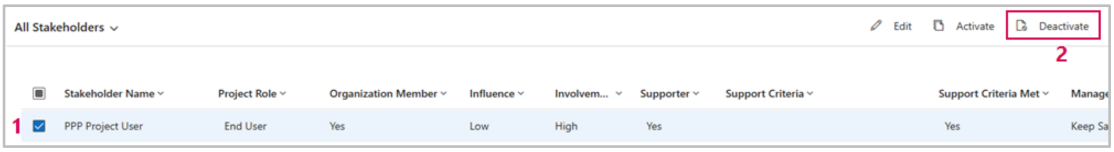


▶ Only Stakeholder with the status Active can be edited. Deactivated Stakeholders are locked for editing.

15.3 Deactivate and Activate Stakeholders

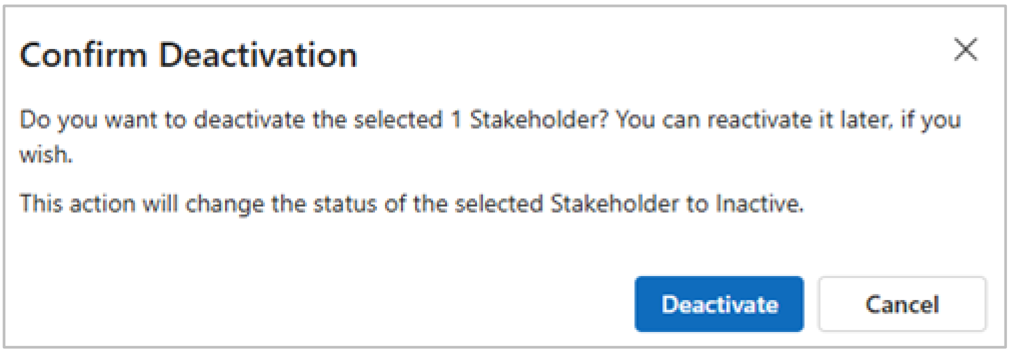
Stakeholders are active by default. You can deactivate Stakeholders:

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



▶ The *Confirm Deactivation* field opens.

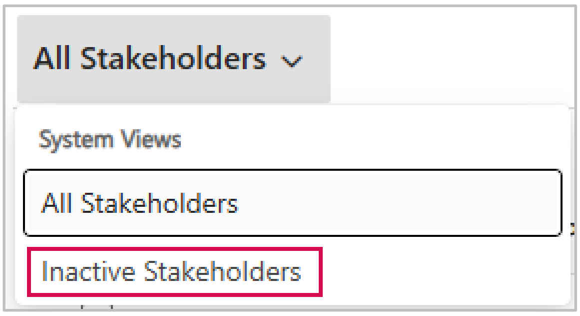
- Click *Deactivate* to deactivate the Stakeholder.



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

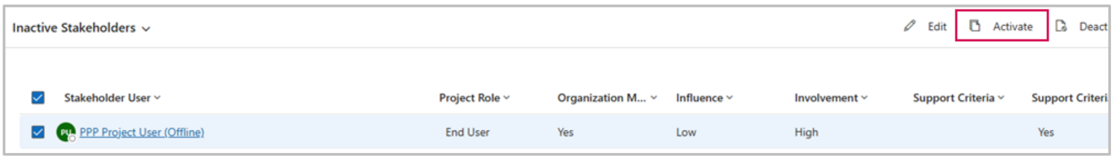
Display only inactive Stakeholders:

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



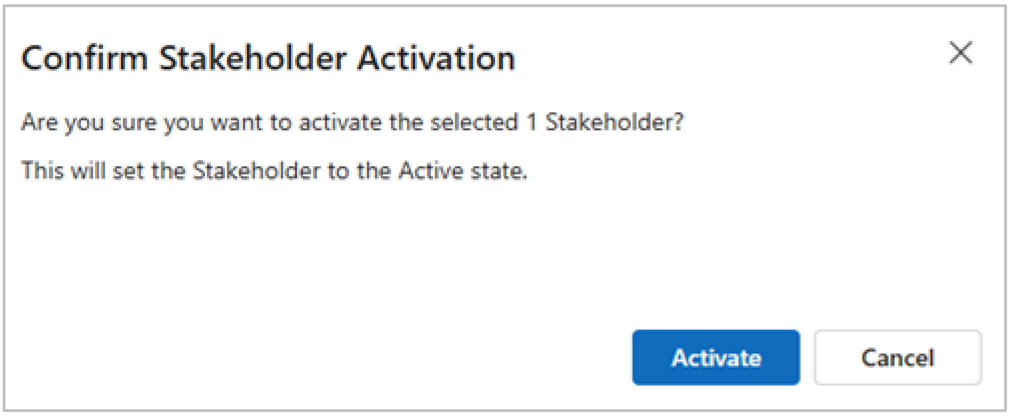
Activate Stakeholders:

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



▶ The *Confirm Stakeholder Activation* field opens.

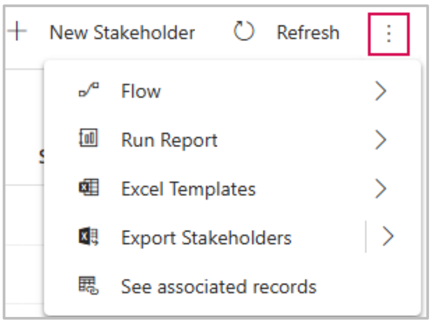
- ➢Click on *Activate* to activate the Stakeholder.



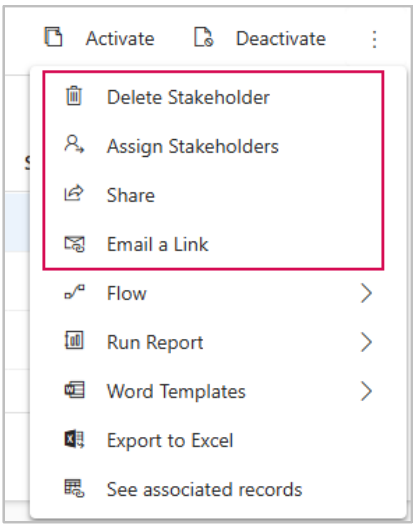
15.4 Additional Commands for Stakeholders

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.

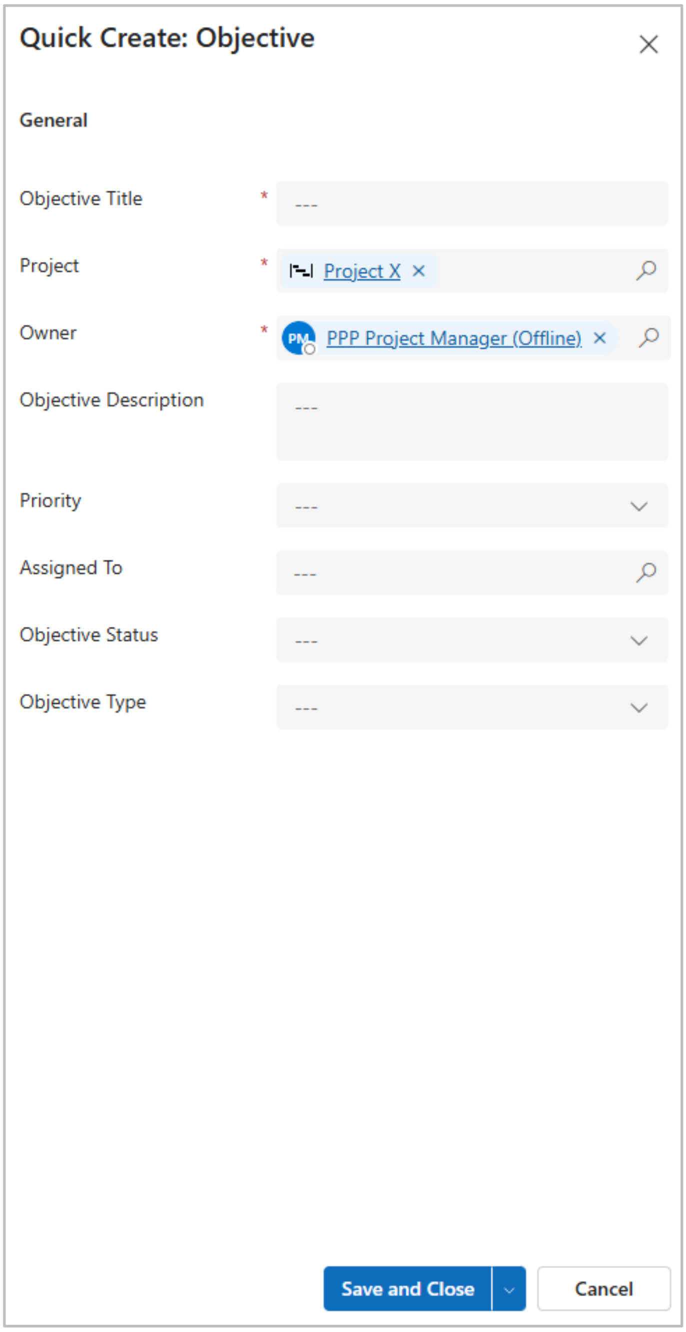
This section describes how to:

- Add Objectives 194
- Edit Objectives 198
- Deactivate and Activate Objectives 199
- Use additional Commands for Objectives 200

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.



- 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.

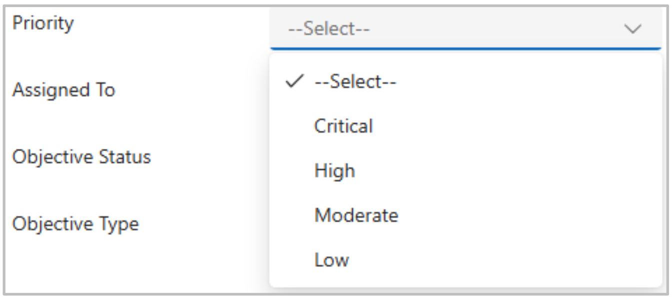
▶ You can select a different project and owner by clicking on the search icon (magnifying glass) and selecting a different project or owner from the drop-down menu.

- *Objective Description:*

➢ Enter meaningful descriptions in the field.

- *Priority:*

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

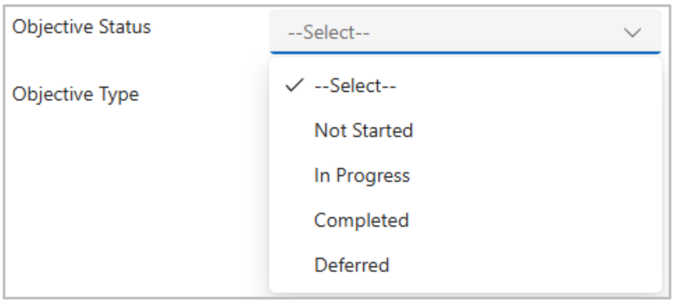


- *Assigned To:* Stakeholder to whom the Objective is assigned.

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

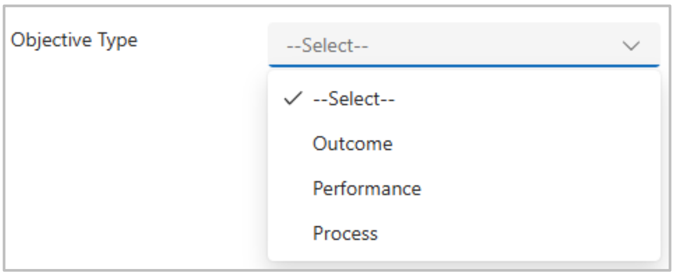
- *Objective Status:*

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



- *Objective Type:*

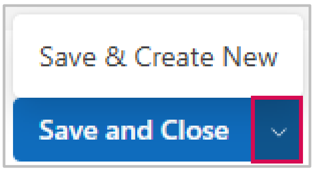
  ➢ Click in the field and select the type from the drop-down menu.



➢ Click *Save and Close*.

Or

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



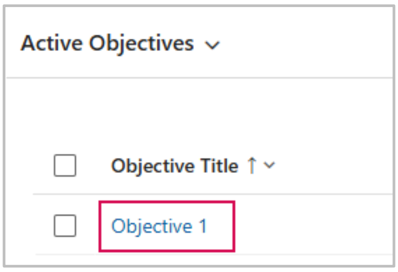
▶ A Objective is added.

▶ 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.



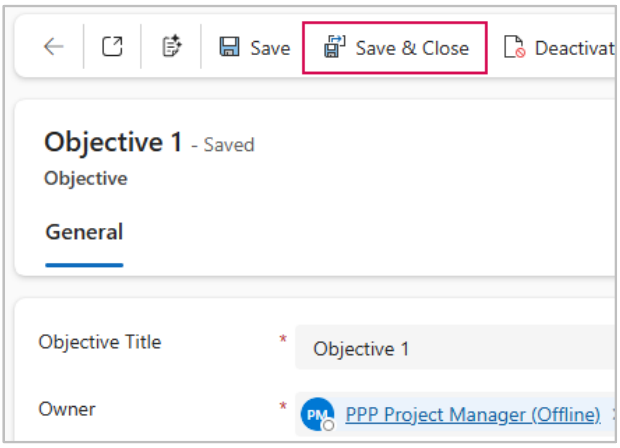
Or

➢ 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:

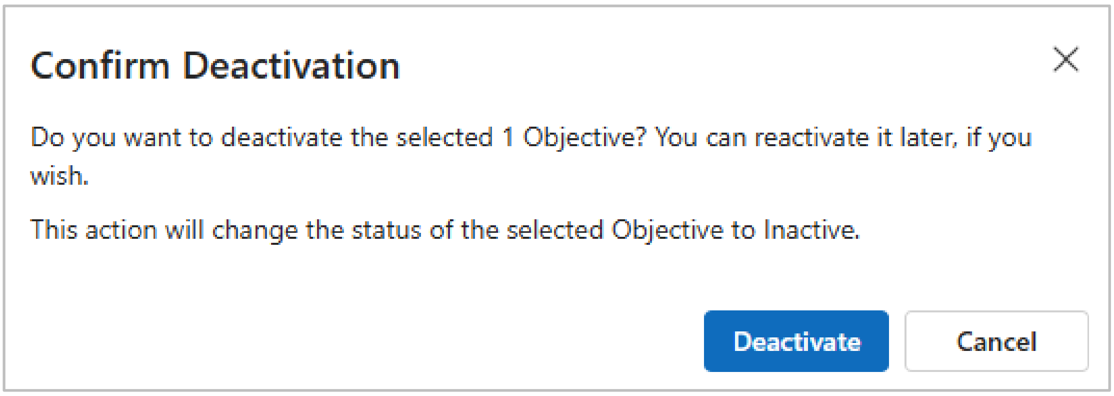
➢ Select the Objective you want to deactivate.

➢ 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.*

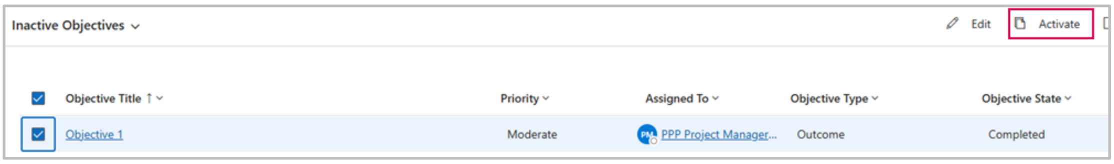
➢ Click the down arrow.

➢ Click on *Inactive Objectives*.

Activate Objectives:

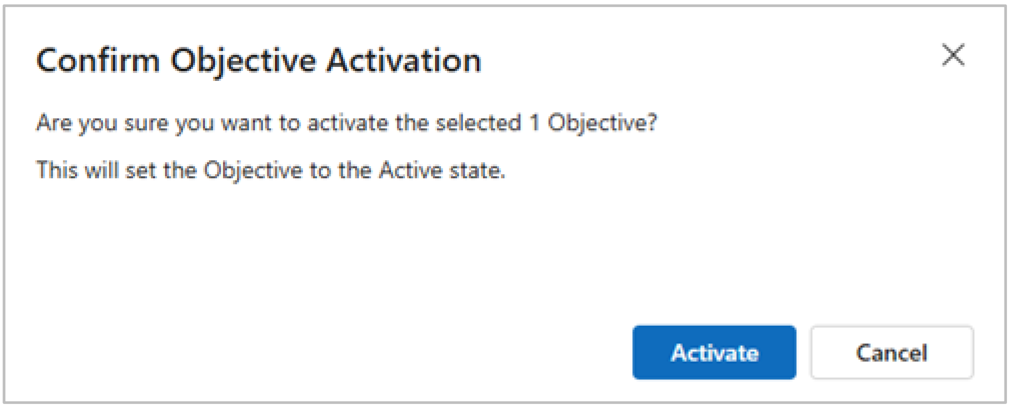
➢ Select the Objective as described above.

➢ Click on *Activate.*



▶ The *Confirm Objective Activation* field opens.

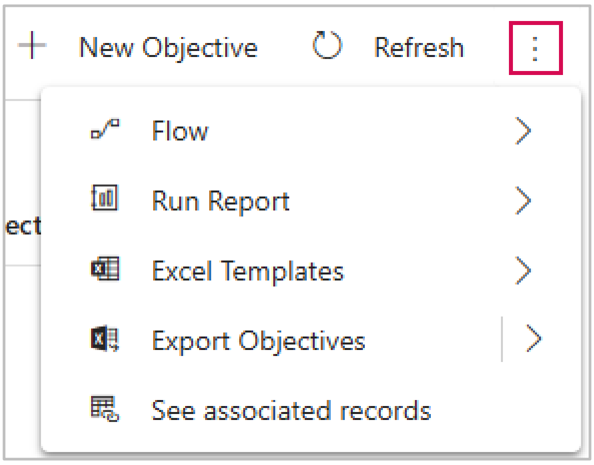
➢ Click on *Activate* to activate the Objective.



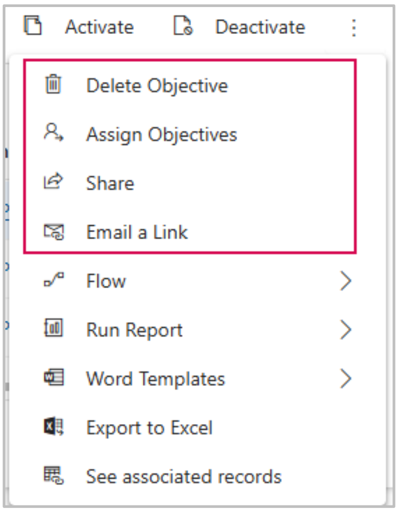
16.4 Additional Commands for Objectives

Above the *Active Objektives* 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

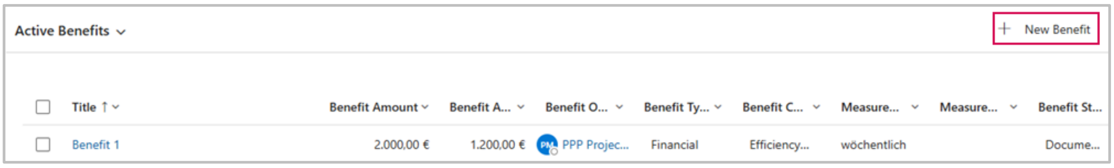
The *Benefits* tab is used for the systematic recording and ongoing tracking of the added value targeted in the project.

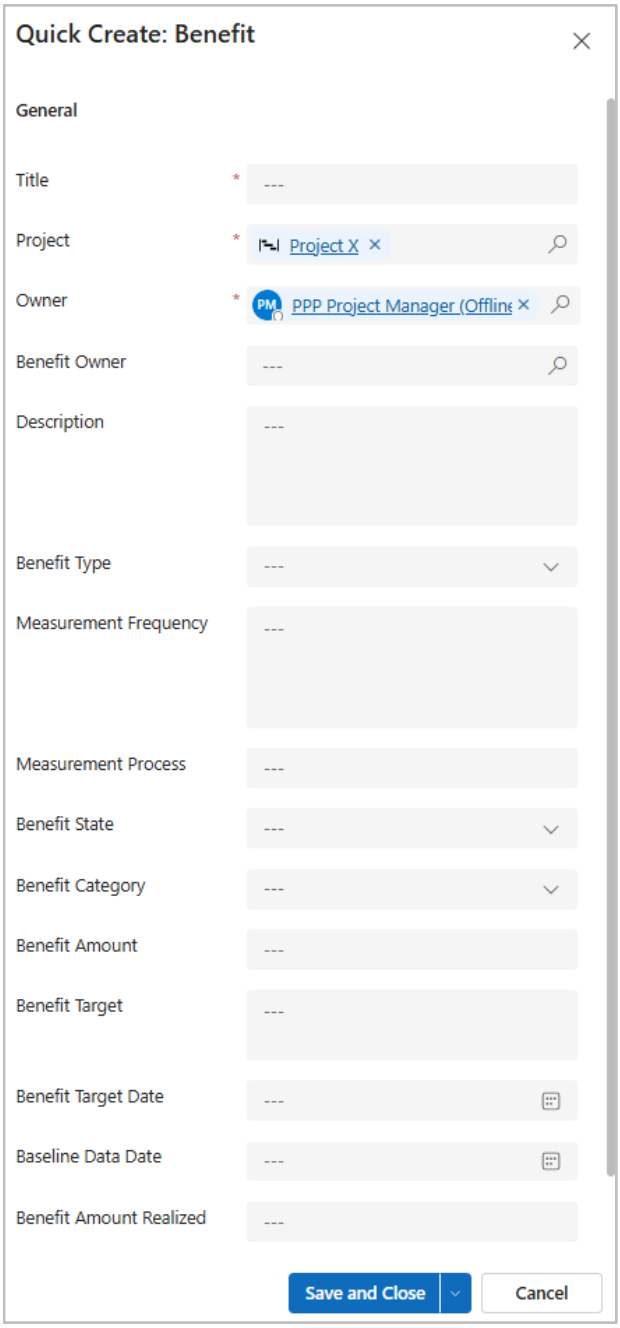
This section describes how to:

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.





- 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:*

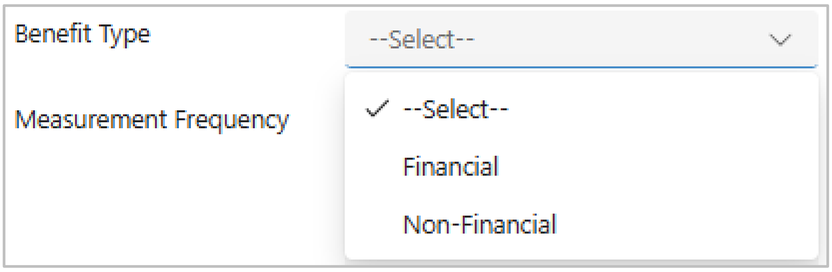
  ➢ Click on the input field, then press the Enter key and enter the responsible person.

- *Description:*

  ➢ Enter a meaningful description of the Benefit.

- *Benefit Type:*

  ➢ Click in the field and select the Benefit Type from the drop-down menu.



- *Measurement Frequency:*

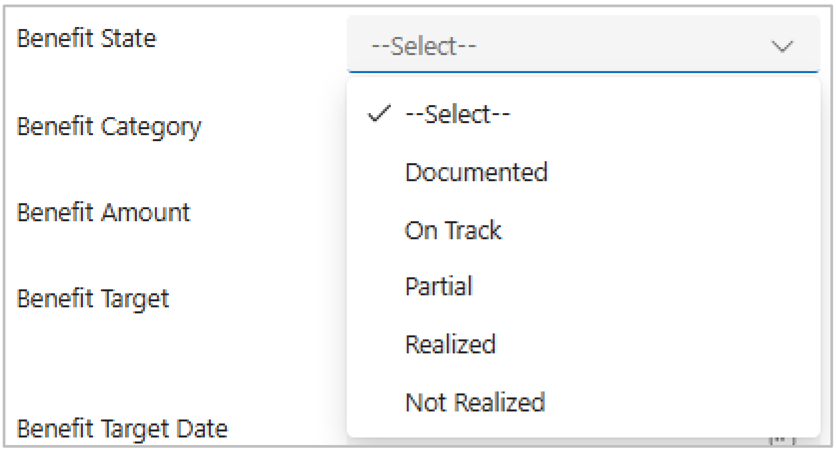
  ➢ Enter the measurement frequency.

- *Measurement Process:*

  ➢ Enter the measurement process.

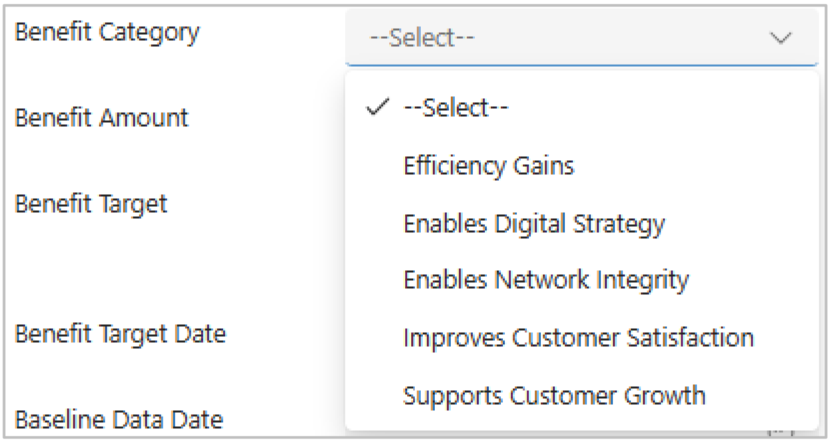
- *Benefit State:*

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



- *Benefit Category:*

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



- *Benefit Amount:*

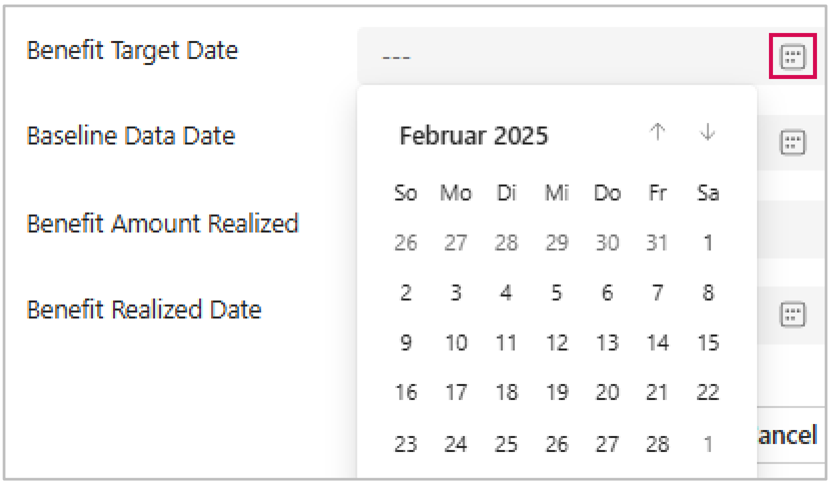
  ➢ Enter the amount.

- *Benefit Target:*

  ➢ Enter a meaningful description.

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

➢ Click on the calendar icon and enter the date.



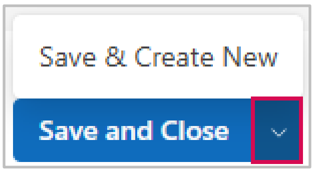
▪ *Benefit Amount Realized:*

➢ Enter the amount.

➢ Click *Save and Close*.

Or

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



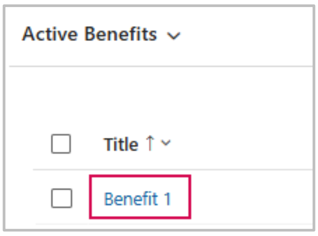
▶ A Benefit is added.

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

17.2 Edit Benefits

A Benefit can be edited as follows:

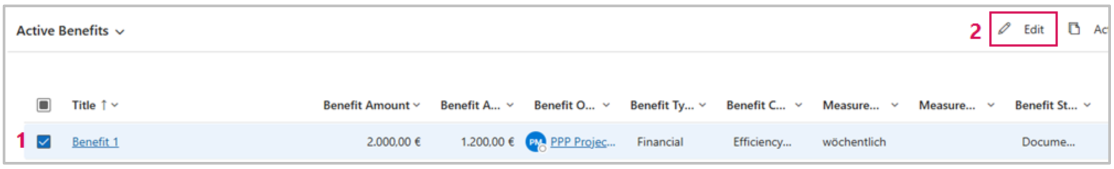
➢ Click on the preview in the *Title* column. ▶ The form for editing the Benefit opens.



Or

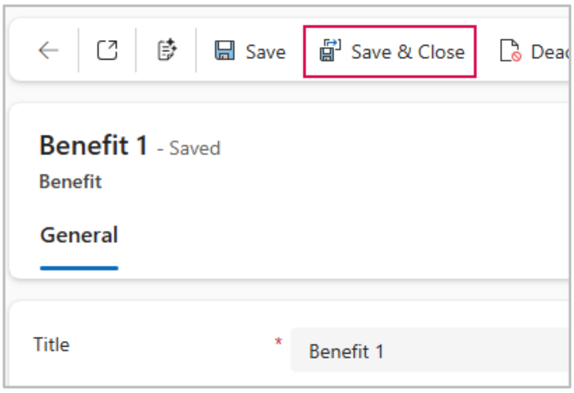
➢ Click on the row of the desired Benefit to select it. (1)

➢ 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.

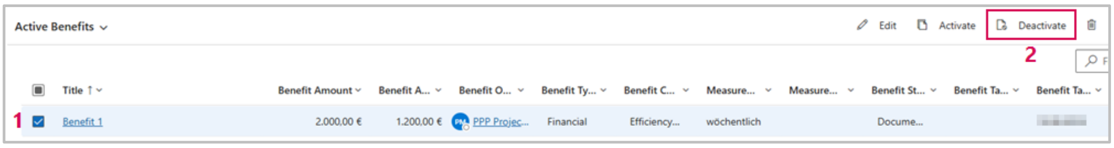
17.3 Deactivate and Activate Benefits

Benefits are active by default. You can deactivate Benefits:

➢ Select the Benefit you want to deactivate.

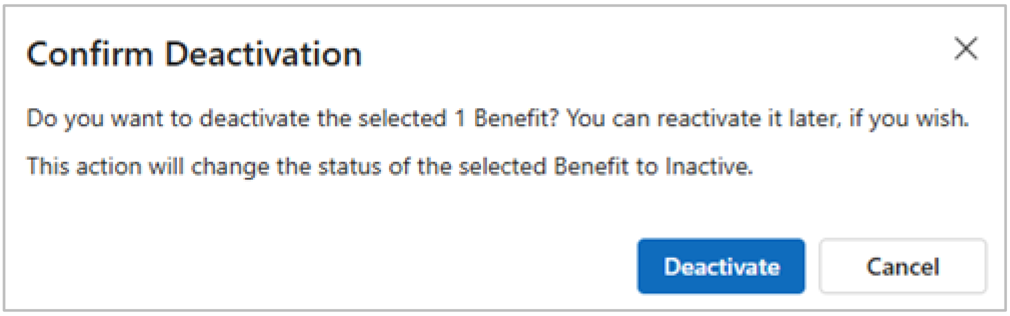
➢ Click on the Benefit row to highlight it. (1)

➢ Click on *Deactivate*. (2)



▶ The *Confirm Deactivation* field opens.

➢ Click *Deactivate* to deactivate the Benefit.



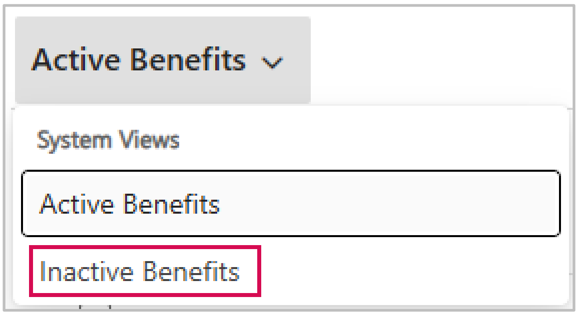
By default, all active and inactive Benefits are listed in the table.

Display only inactive Benefits:

➢ Go to *Active Benefits.*

➢ Click the down arrow.

➢ Click on *Inactive Benefits*.

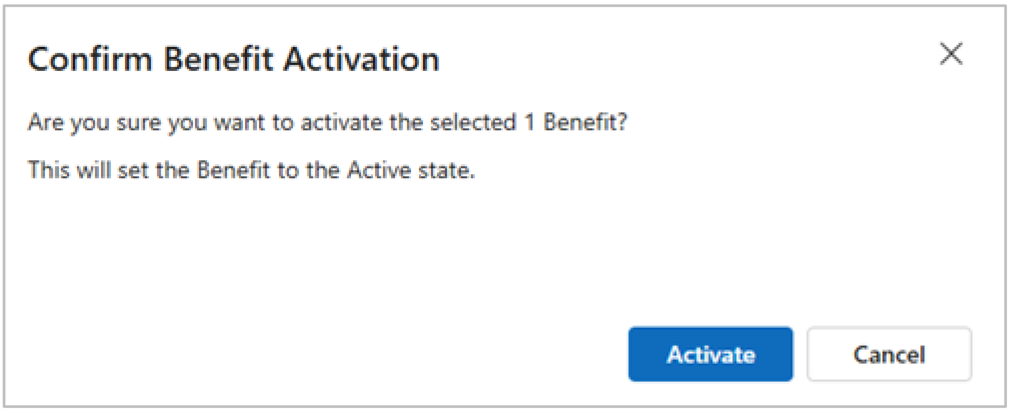


Activate Benefits:

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

▶ The *Confirm Benefit Activation* field opens.

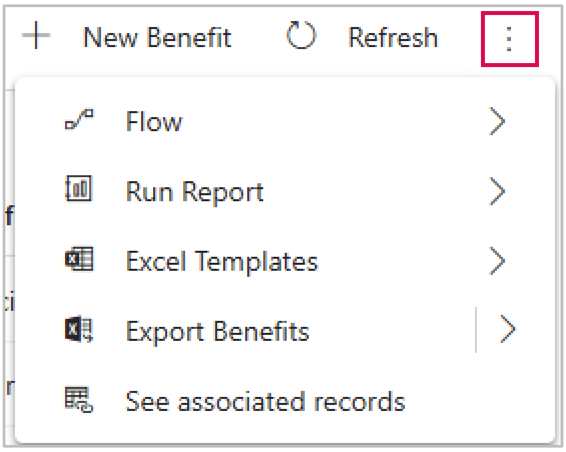
- ➢ Click on *Activate* to activate the Benefit.



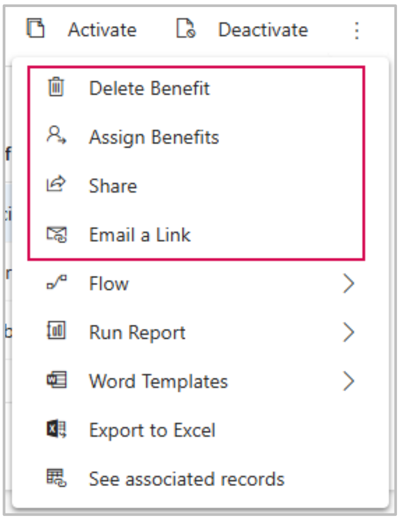
17.4 Additional Commands for Benefits

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.

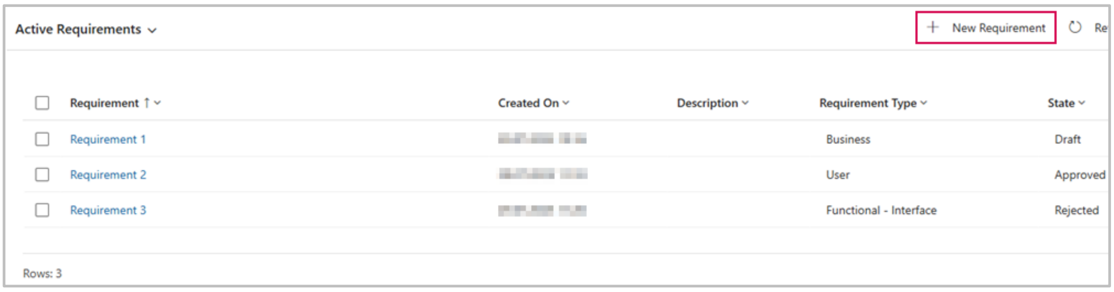
This section describes how to:

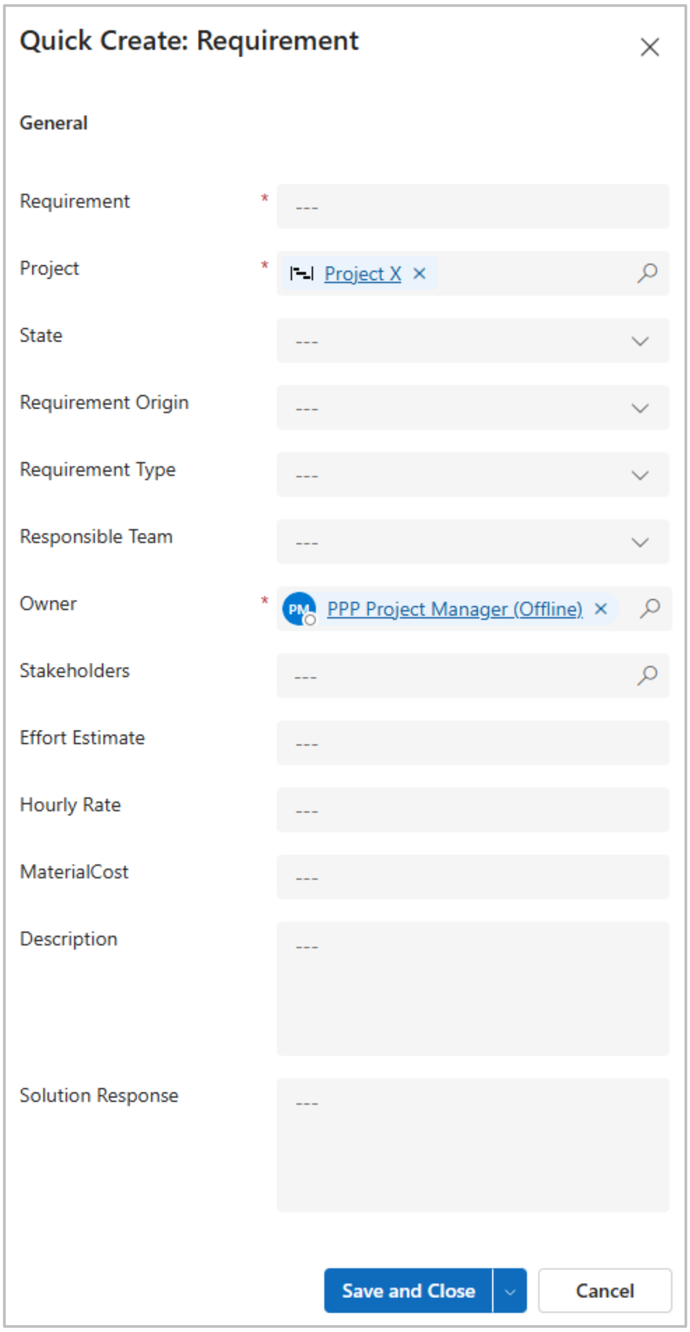
- Add Requirements 211
- Edit Requirements 216
- Deactivate and Activate Requirements 217
- Use additional Commands for Requirements 218

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.





- Fill out the form:

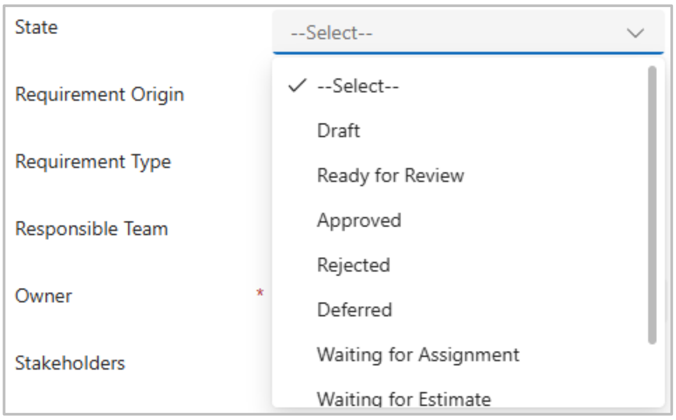
▶ To add a Requirement, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- *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.

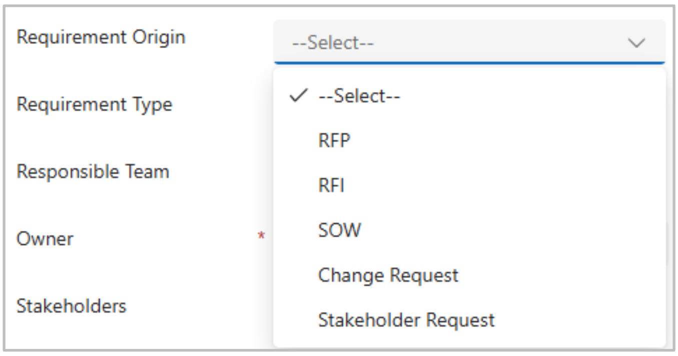
- *State:*

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



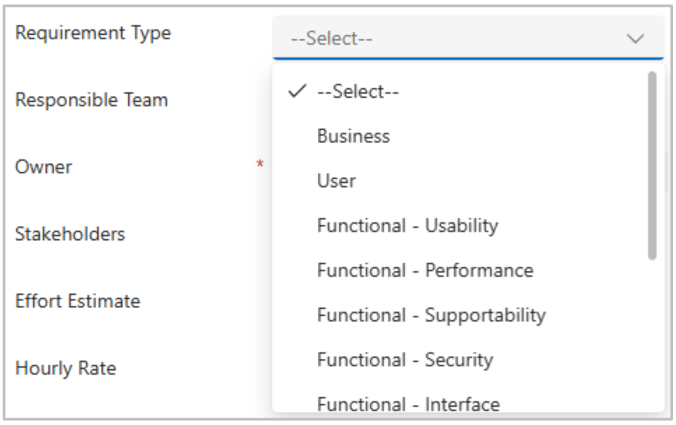
- *Requirement Origin:*

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



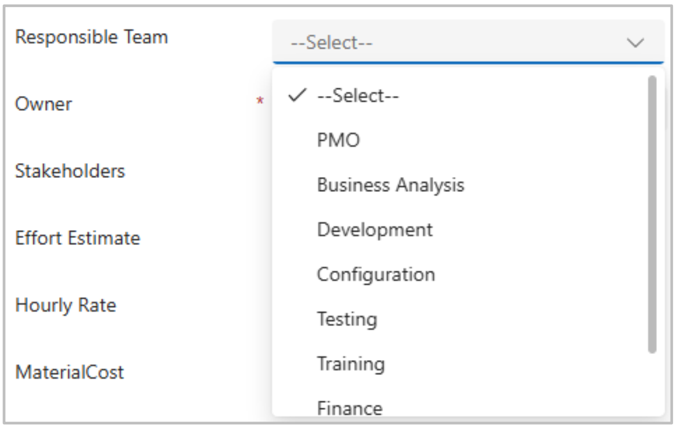
- *Requirement Type:*

  ➢ 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.

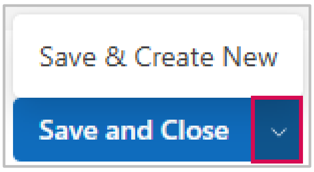
- *Description, Solution Response:*

  ➢ 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.



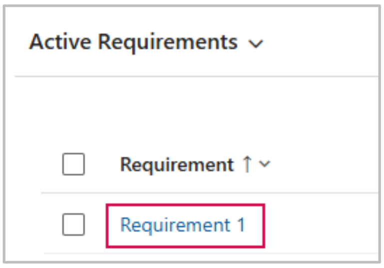
▶ A Requirement is added.

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

18.2 Edit Requirements

A Requirement can be edited as follows:

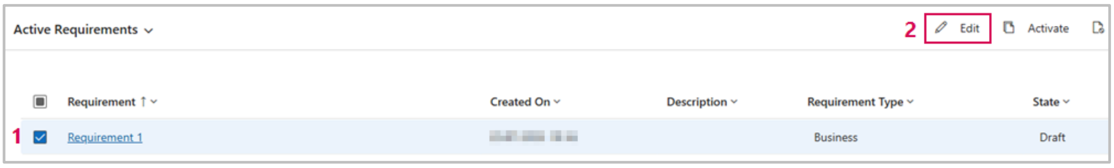
➢ Click on the preview in the *Requirement* column. ▶ The form for editing the Requirement opens.



Or

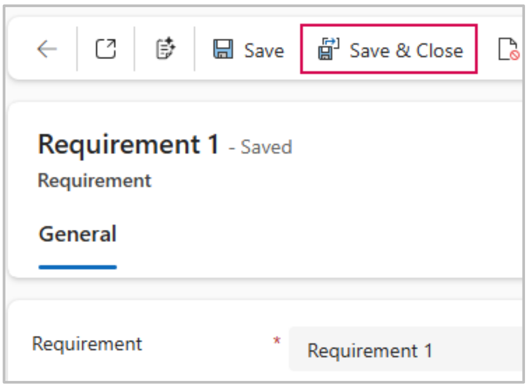
➢ Click on the row of the desired Requirement to select it. (1)

➢ 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.

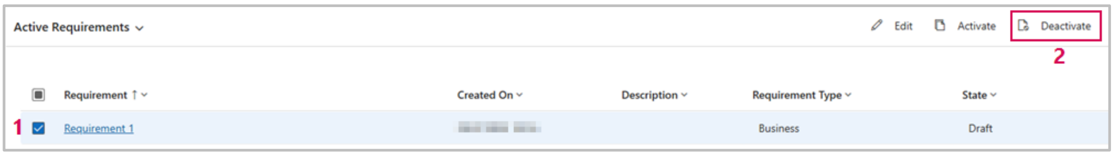
18.3 Deactivate and Activate Requirements

Requirements are active by default. You can deactivate Requirements:

➢ Select the Requirement you want to deactivate.

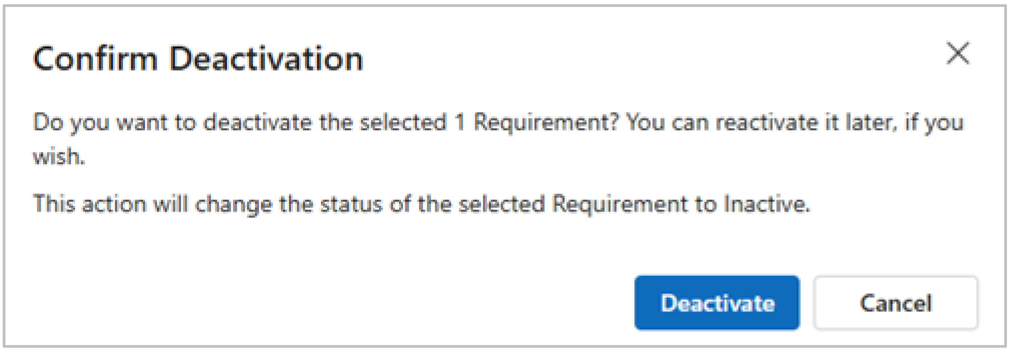
➢ Click on the Requirement row to highlight it. (1)

➢ Click on *Deactivate*. (2)



▶ The *Confirm Deactivation* field opens.

➢ Click *Deactivate* to deactivate the Requirement.



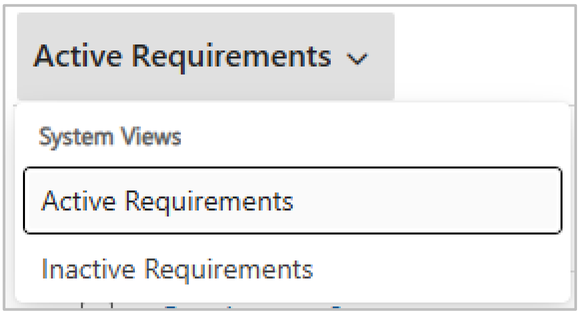
By default, all active and inactive Requirements are listed in the table.

Display only inactive Requirements:

➢ Go to *Active Requirements.*

➢ Click the down arrow.

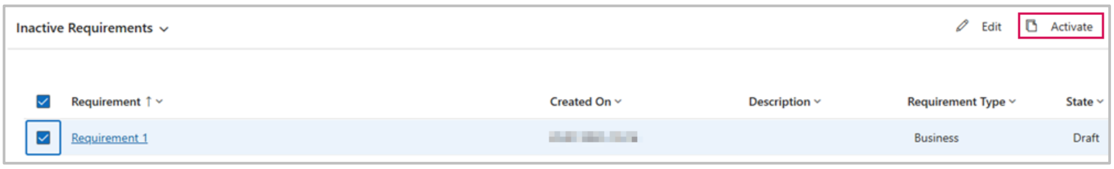
➢ Click on *Inactive Requirements*.



Activate Requirements:

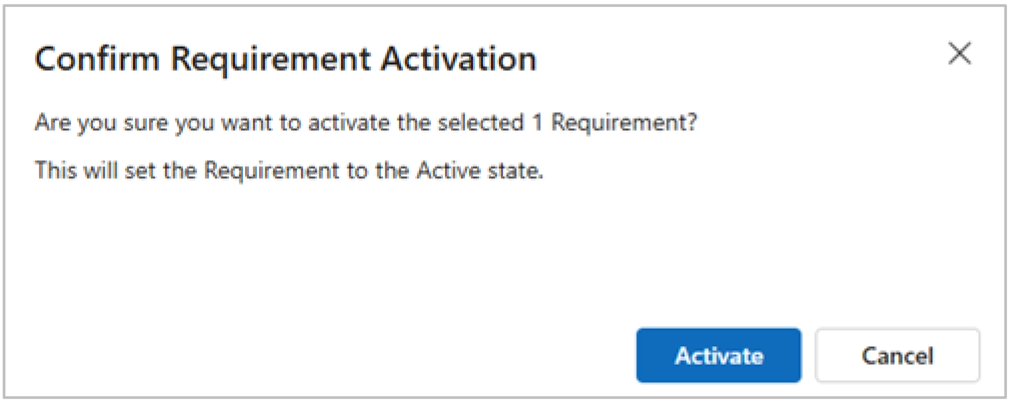
➢ Select the Requirement as described above.

➢ Click on *Activate.*



▶ The *Confirm Requirement Activation* field opens.

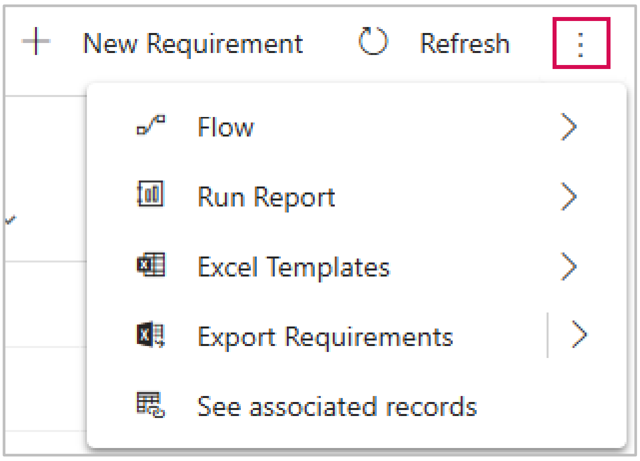
➢ Click on *Activate* to activate the Requirement.



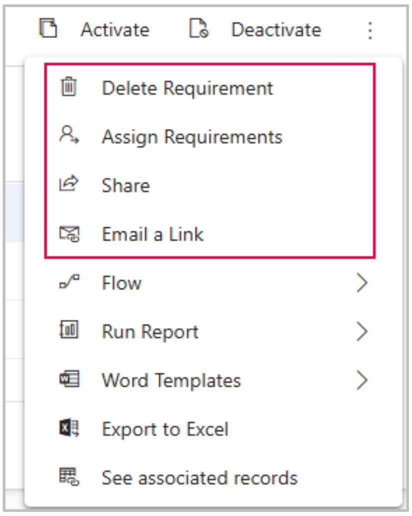
18.4 Additional Commands for Requirements

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.

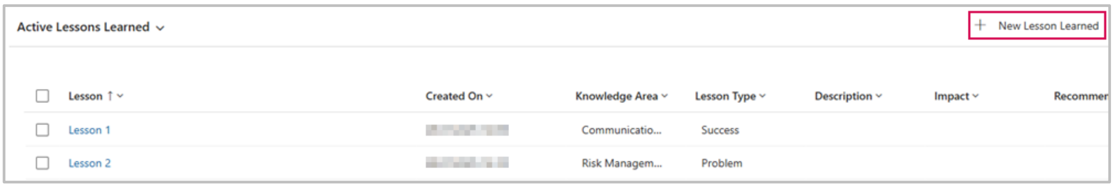
This section describes how to:

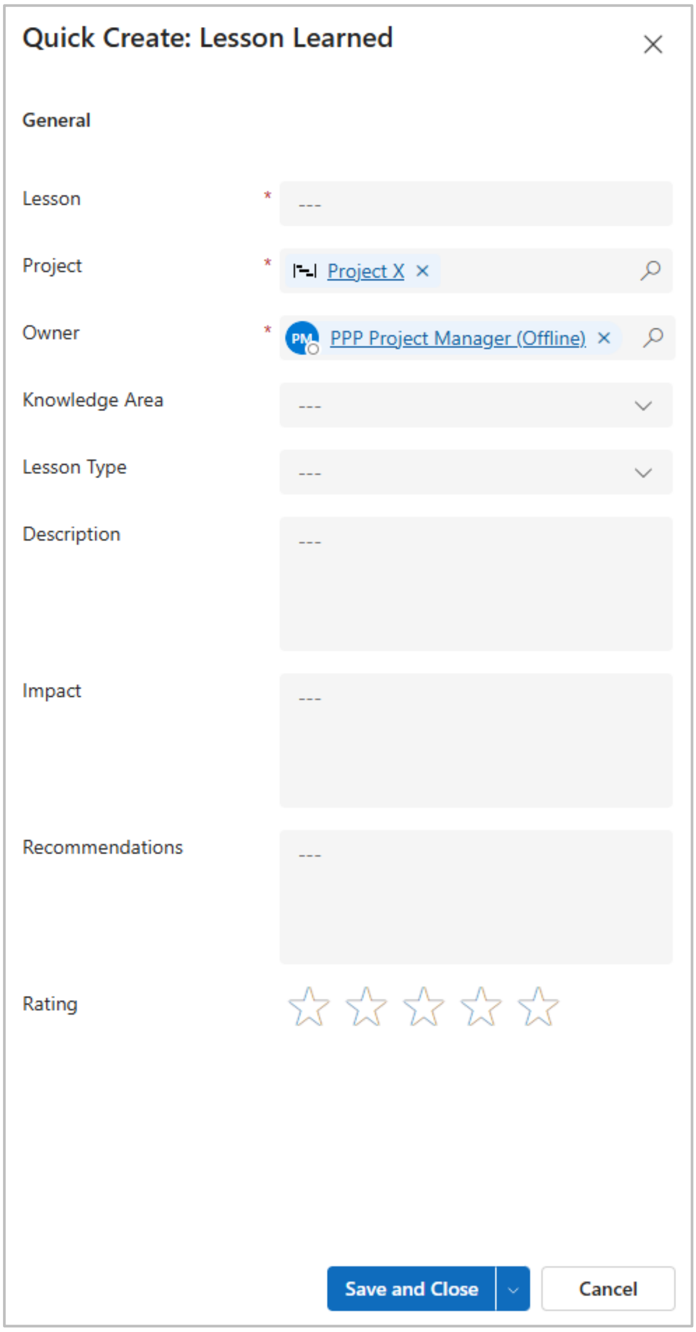
- Add Lessons Learned 220
- Edit Lessons Learned 223
- Deactivate and Activate Lessons Learned 224
- Use additional Commands for Lessons Learned 226

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.





- Fill out the form:

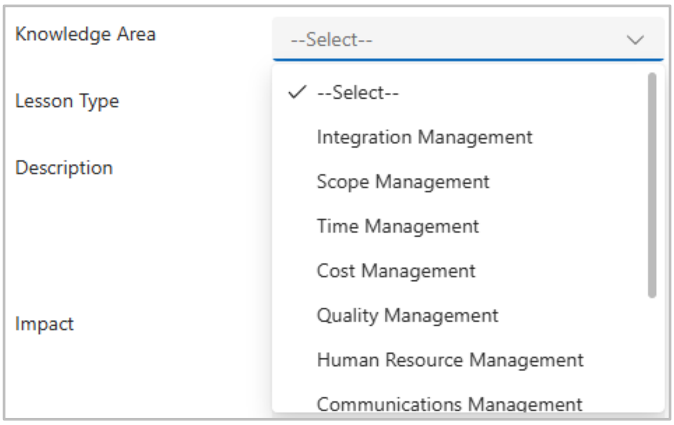
▶ To add a Lesson Learned, the mandatory fields must be filled out. All mandatory fields are marked with a red star.

- *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.

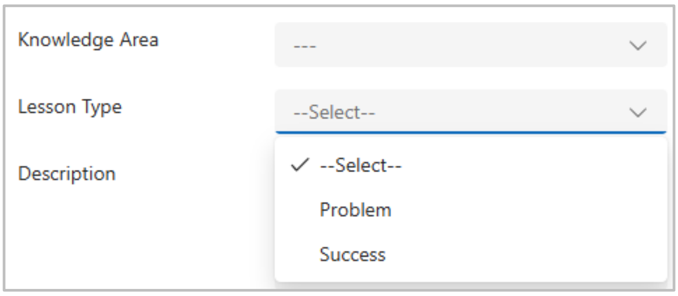
- *Knowledge Area:*

➢ 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::*

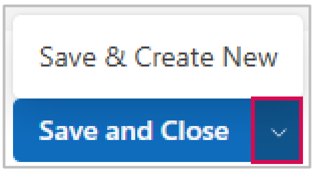
➢ Enter a description, impact, and recommendation. The descriptions should be as meaningful as possible.

- *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.



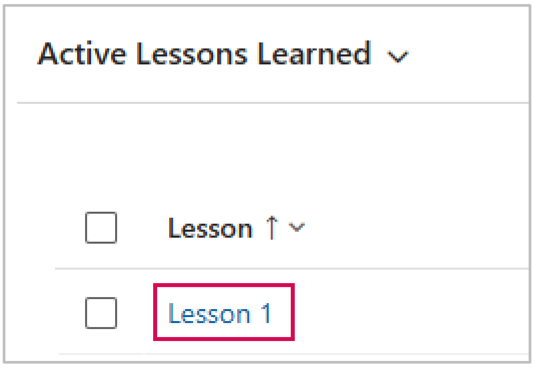
▶ A Lesson Learned is added.

▶ The Lesson Learned appears in the *Active Lessons Learned* table.

19.2 Edit Lessons Learned

A Lesson Learned can be edited as follows:

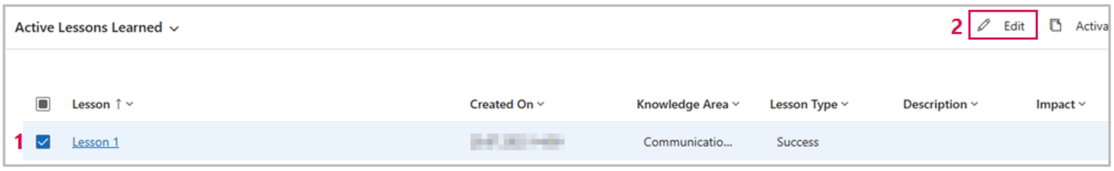
➢ Click on the preview in the *Lesson* column. ▶ The form for editing the Lesson Learned opens.



Or

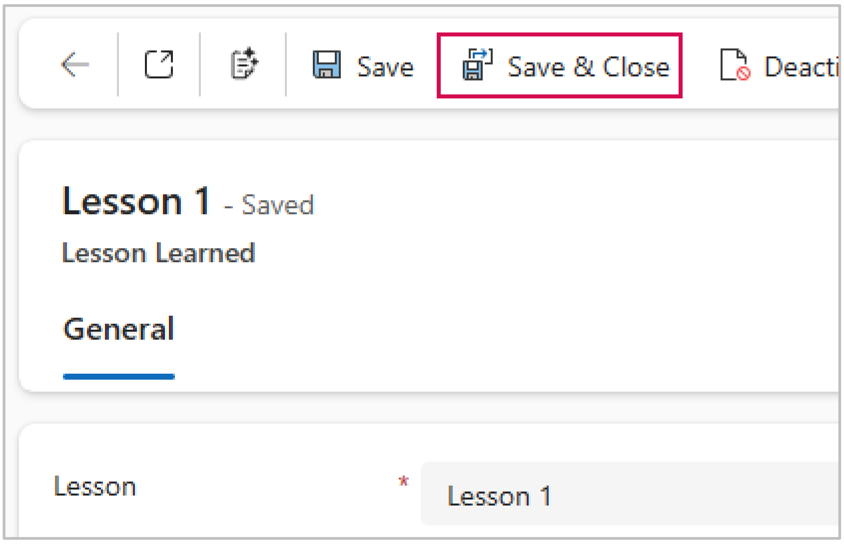
➢ Click on the row of the desired Lesson Learned to select it. (1)

➢ Click on *Edit*. (2)



➢ Enter the desired changes in the form.

➢ Click *Save & Close* to save the Lesson Learned and finish editing.



▶ Only Lessons Learned with the status Active can be edited. Deactivated Lessons Learned are locked for editing.

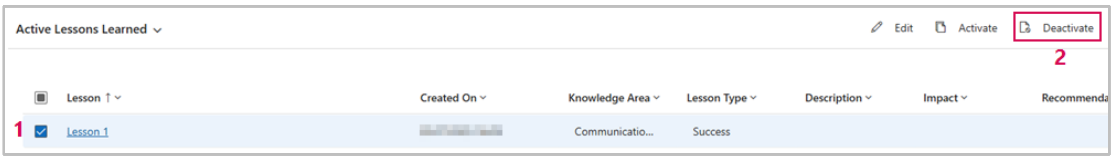
19.3 Deactivate and Activate Lessons Learned

Lessons Learned are active by default. You can deactivate Lessons Learned:

➢ Select the Lesson Learned you want to deactivate.

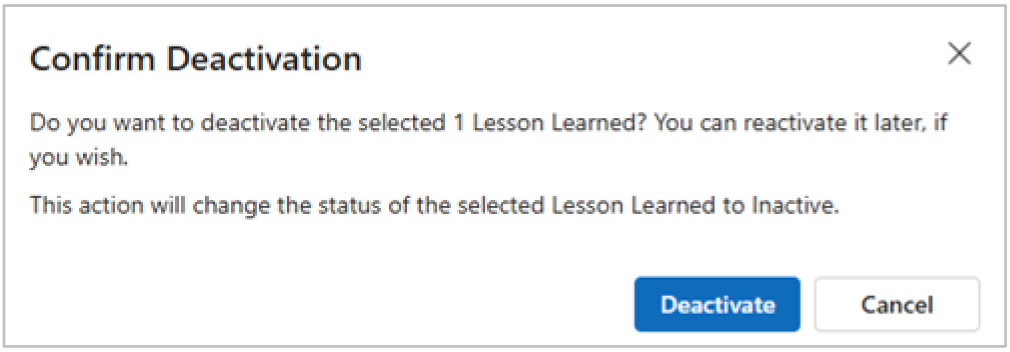
➢ Click on the Lesson Learned row to highlight it. (1)

➢ Click on *Deactivate*. (2)



▶ The *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.*

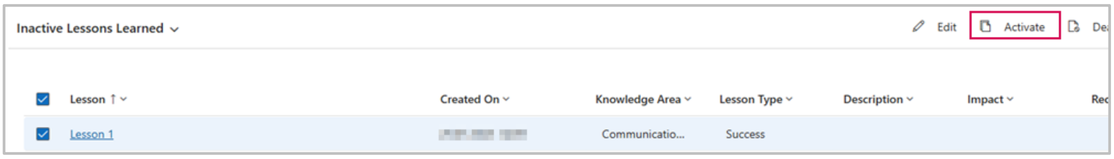
➢ Click the down arrow.

➢ Click on *Inactive Lessons Learned*.

Activate Lessons Learned:

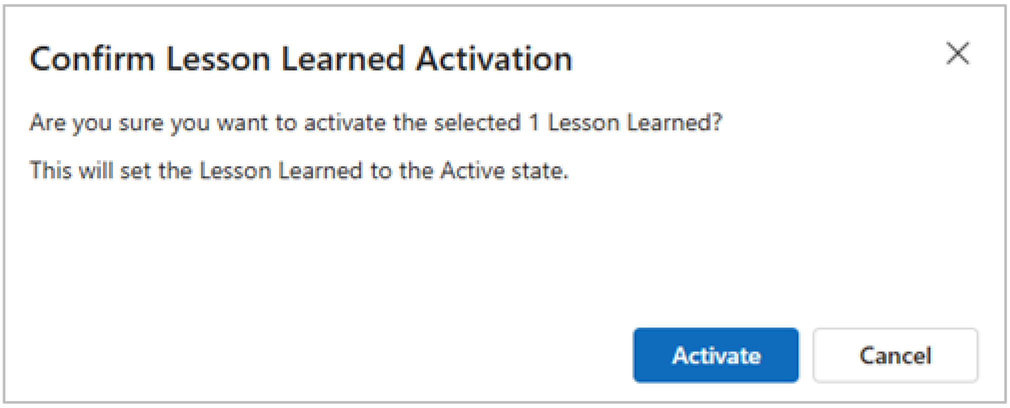
➢ Select the Lesson Learned as described above.

➢ Click on *Activate.*



▶ The *Confirm Lesson Learned Activation* field opens.

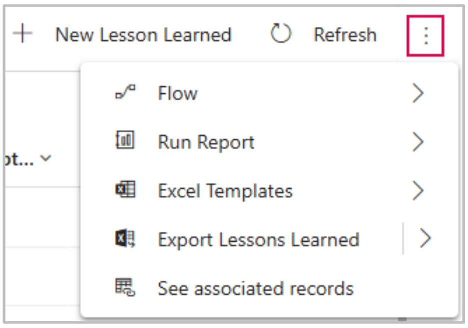
➢ Click on *Activate* to activate the Lesson Learned.



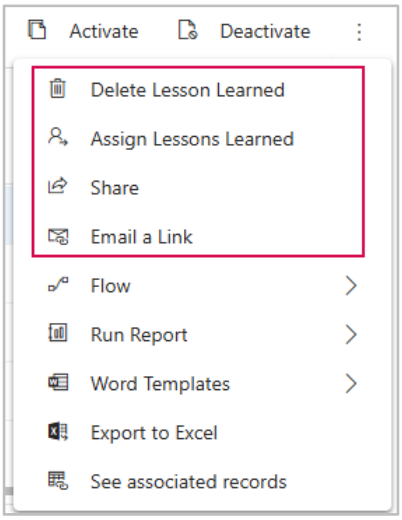
19.4 Additional Commands for Lessons Learned

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 Drivers

On the *Drivers* tab, you can manage drivers for your project.

This section describes how to:

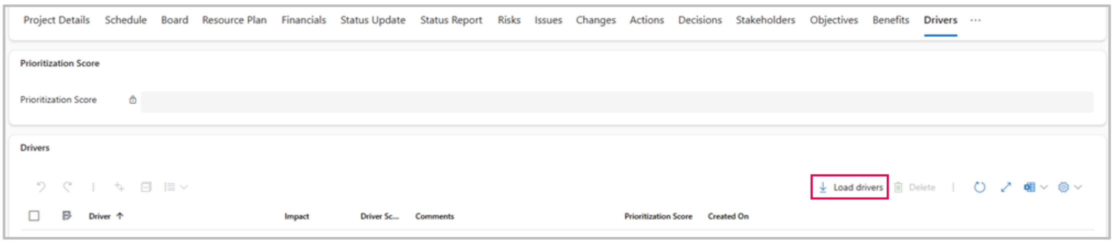
- Load and rate drivers in the project 228
- Create and view drivers 232
- Access the Priority Dashboard 235

20.1 Load and rate drivers

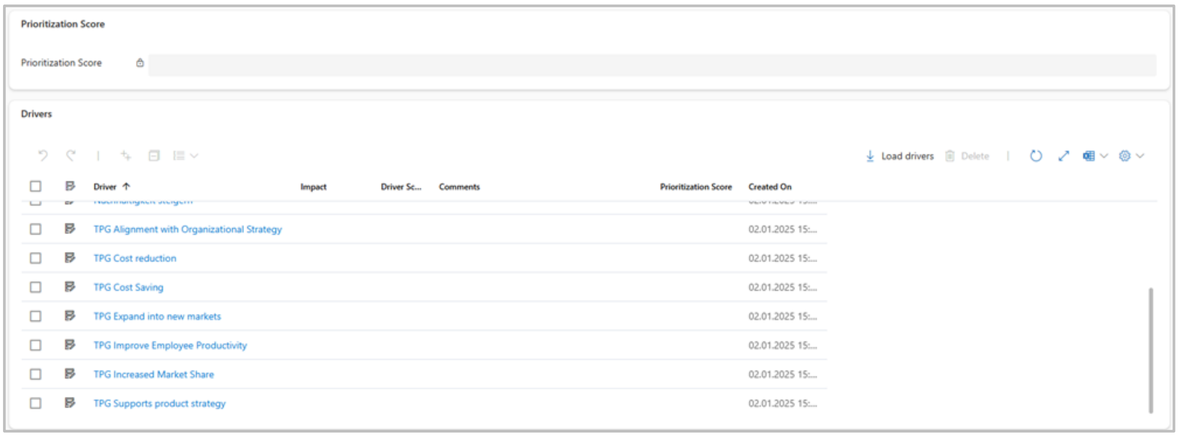
Loading drivers:

To load drivers in your project, proceed as follows:

- ➢ Open the desired project.
- ➢ Go to the *Drivers* tab.
- ➢ Click *Load drivers*.



▶ A list of all active drivers is displayed.



Deleting drivers:

You can delete drivers that are no longer needed as follows:

➢ Click the checkbox in front of the desired driver.

➢ Click *Delete*.

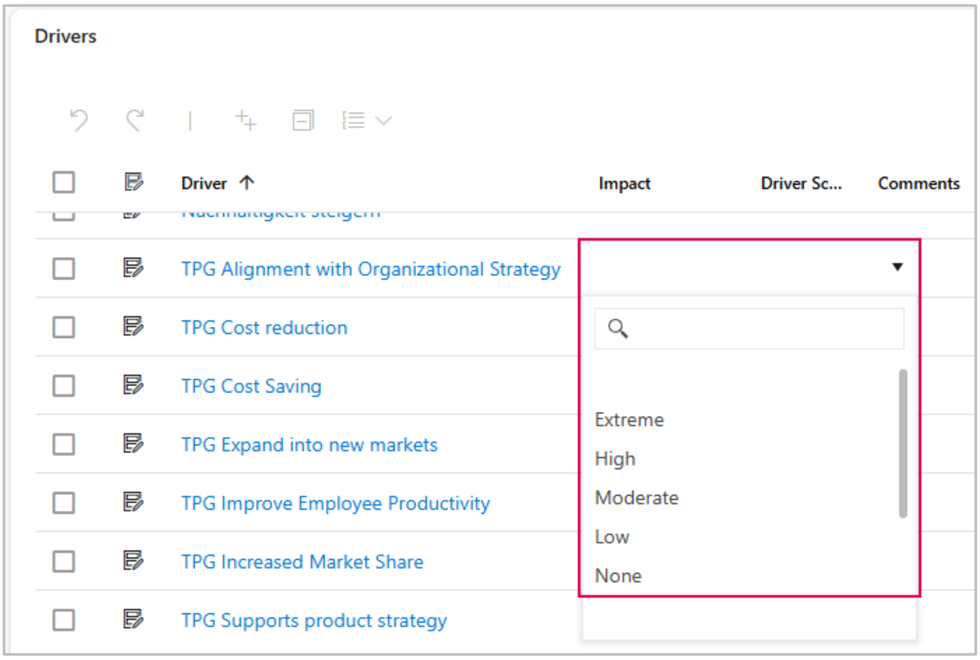
▶ The driver is deleted from the project.

Rate drivers:

You can specify the impact of a driver on the project as follows:

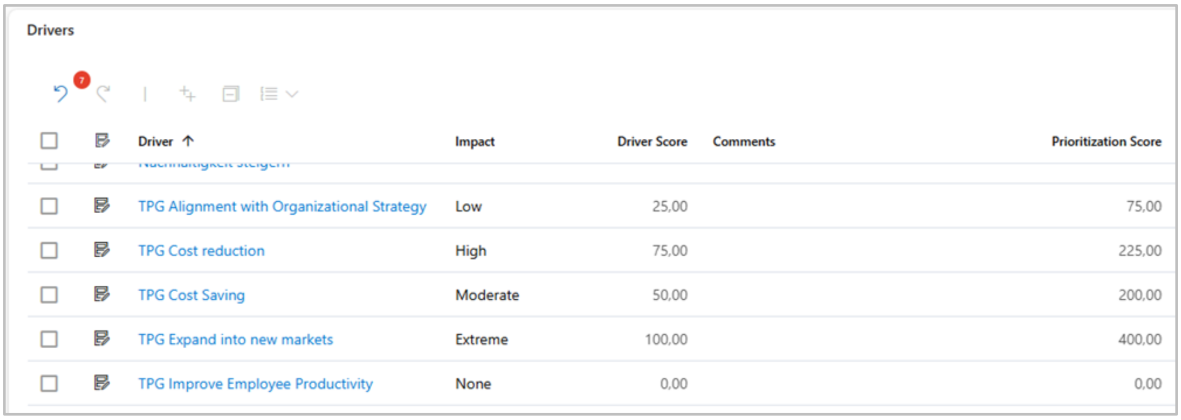
➢ In the *Impact* column, click the cell of the desired driver. ▶ A drop-down menu opens.

➢ Click on the desired impact level.



▶ The *Driver Score* column is filled in automatically. The *Driver Score* is based on the degree of impact and indicates how strongly a driver influences the project.

▶ The *Prioritization Score* is calculated automatically. The *Prioritization Score* is based on the *Driver Weighting* and helps you decide which drivers should be considered first.



Display driver weighting:

➢ Click on the desired driver to open its detailed view.

▶ The *Driver Weighting* is displayed there in the form of a star rating:

- 0 stars = lowest weighting
- 5 stars = highest weighting

20.2 Create and view drivers

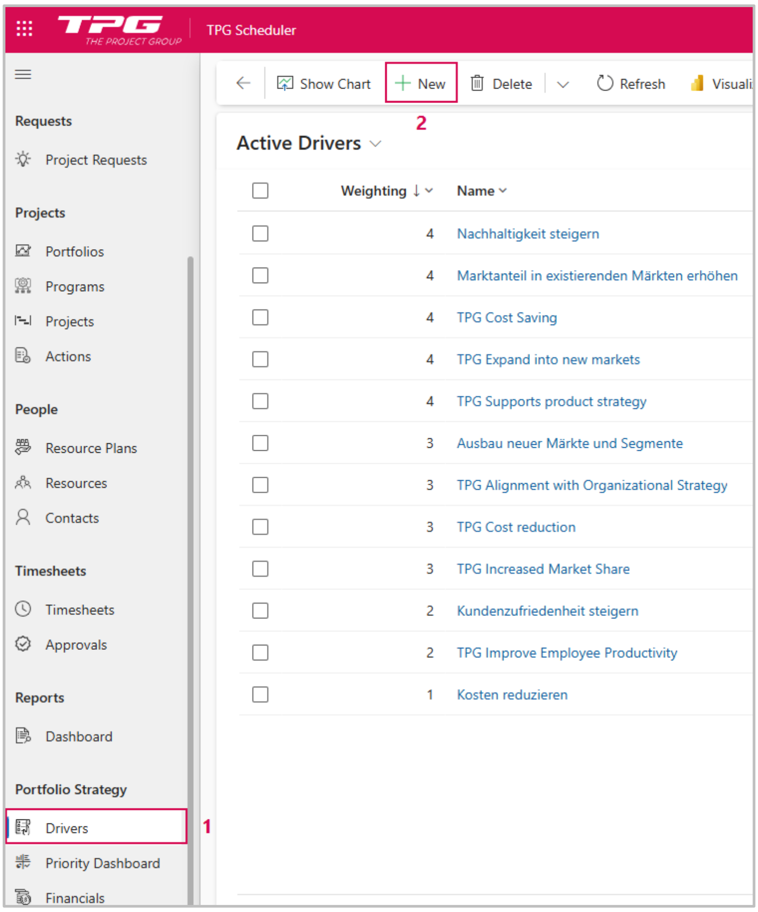
In the *Portfolio Strategy* section of the Navigation bar 18, you can create or view drivers, depending on your permissions.

▶ The ability to create or edit drivers depends on your user role and access rights.

Create drivers:

➢ Click *Drivers* in the *Portfolio Strategy* section of the Navigation bar. (1) ▶ A list of all active drivers is displayed.

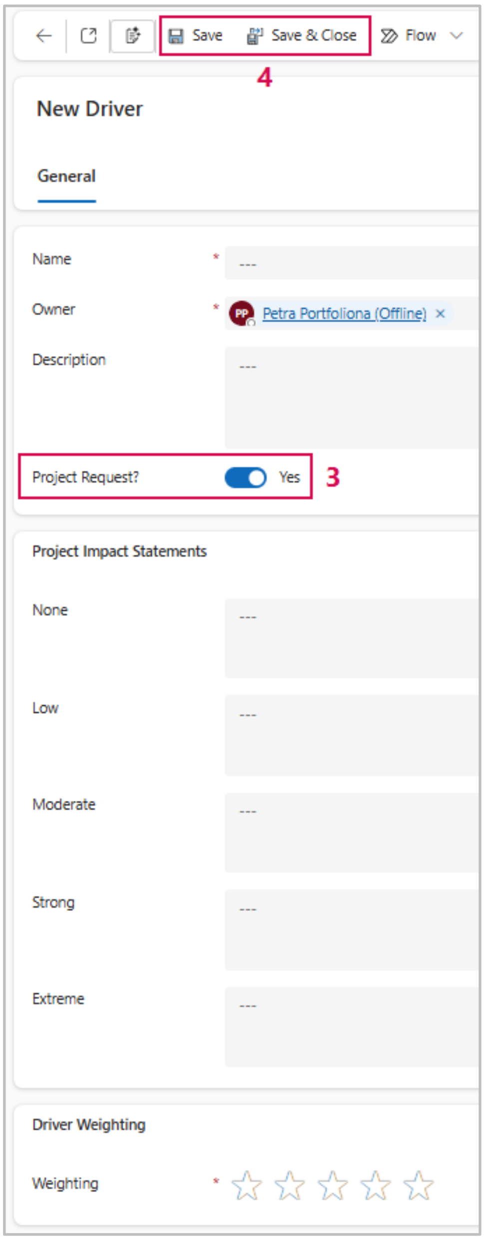
➢ Click *New* in the Command bar 14. (2) ▯ The *New Driver* form opens.



➢ Fill out the *New Driver* form. Select *Yes* for *Project Request?* (3)

➢ Click *Save* or *Save & Close*. (4)

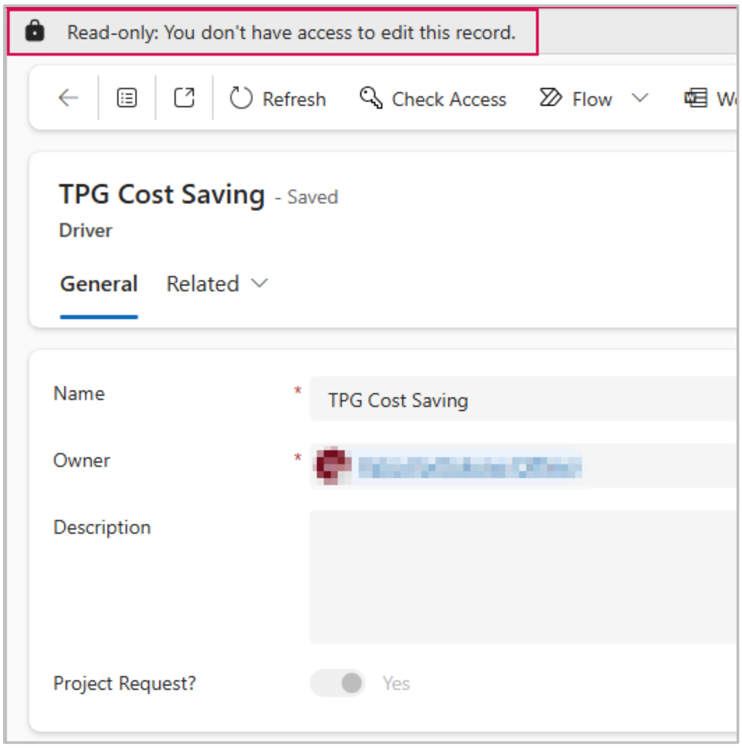
▶ A new driver is created.



Even without permission to create, you can view the details of an existing driver:

➢ Click on the desired driver in the overview.

▶ The read-only form with the driver details opens. You can view the information, but not edit it.

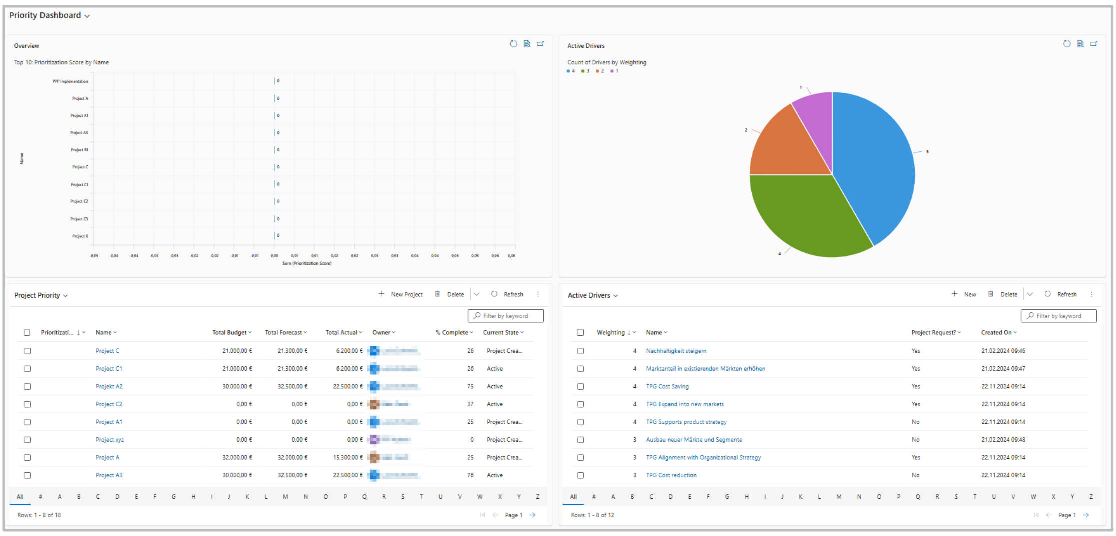


20.3 Priority Dashboard

In the *Portfolio Strategy* section of the Navigation bar 18, you can access a Priority Dashboard. The dashboard supports you in strategically evaluating and prioritizing projects.

The priority values of the projects are based on two factors:

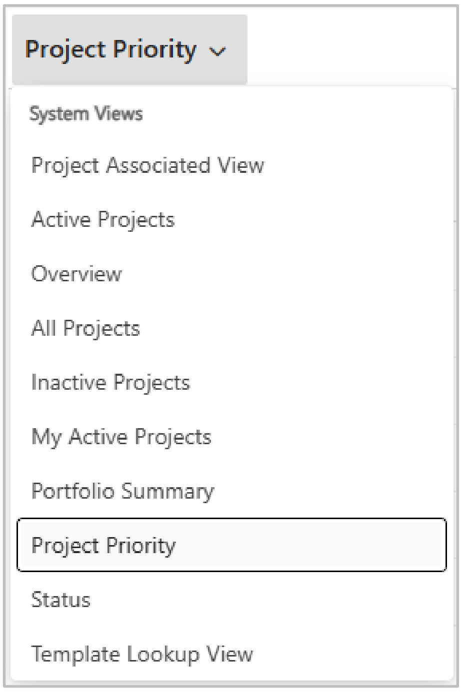
- General weighting of the individual drivers
- The impact that the drivers are expected to have on the respective project



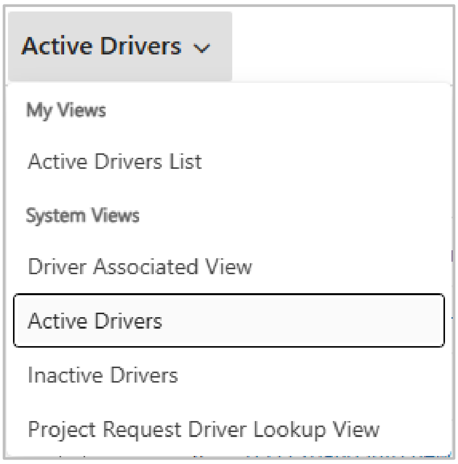
The Priority Dashboard contains two charts and two tables that present key information visually and in tabular form:

- **Overview (bar chart):** *Top 10: Prioritization Score by Name*
  - Shows the ten projects with the highest Prioritization Score.
- **Active Drivers (pie chart)**: *Count of Drivers by Weighting*
  - Shows the distribution of active drivers by weighting.
- **Project list (table):** *Project Priority* (by default)
  - Contains additional information such as project name, status, and responsible person.
  - Other lists can be displayed using the drop-down menu.
    (Lists sorted by priority can also be found in the view options under *Project Requests* and

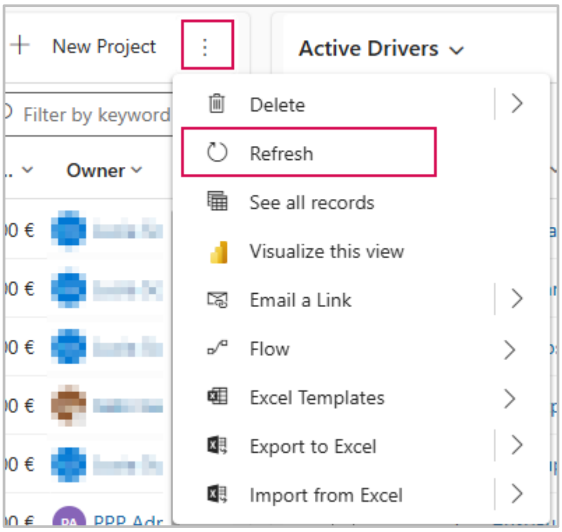
Projects in the navigation bar.)



- **List of drivers (table):** *Active Drivers* (by default)
  - Shows all drivers currently available in the system.
  - Other lists can be displayed using the drop-down menu.



- The dashboard is automatically updated as soon as changes are made to drivers or projects.
- If necessary, you can update it manually using the *Refresh* button (if available).



21 Timesheets

Timesheets allows you to track the work performed for each task in the project. Approved entries are displayed in the project on the *Timesheets* tab.

Timesheets offers the following functions:

- Select projects and tasks for a specific period
- Create favourites to quickly transfer tasks and work values to multiple periods
- Status indicators that show the processing status of individual entries
- Callback function to cancel entries that have already been submitted
- Comment function for project team members and approvers

Project employees can record and report their working hours in the *My Timesheets* view.

Reported times appear in the *My Approvals* view for project managers, where they can be approved.

In this chapter, you will learn how to use the TPG ProjectPowerPack (PPP) to:

- Use the user interface of the *My Timesheets* view 239
- Assign Timesheets permissions 243
- Add tasks to Timesheets 245
- Record working time 249
- Approve entries 253
- View approved entries in the project 254

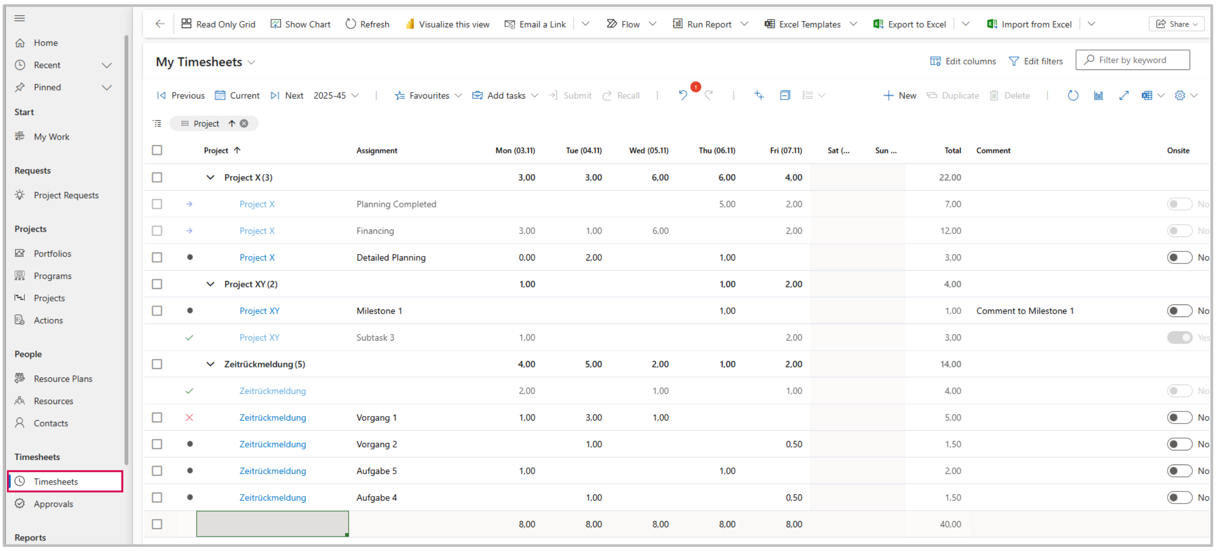
21.1 User interface for Timesheets

The *My Timesheets* view can be accessed via the *Timesheets* section in the Navigation bar 18:

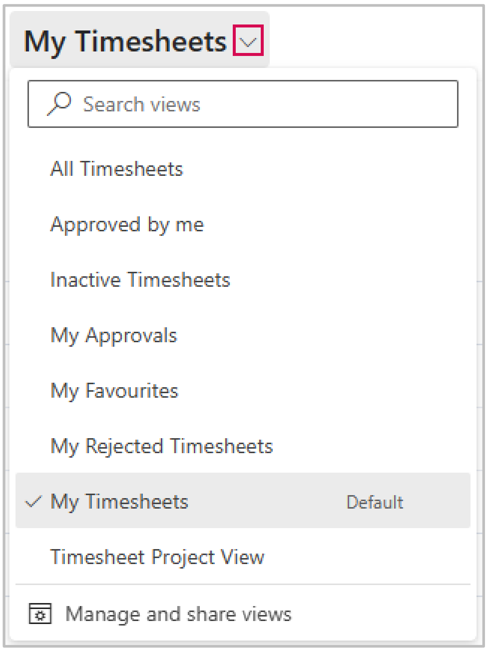
➢ Go to the *Timesheets* section in the Navigation bar.

➢ Click on *Timesheets*.

▶ The *My Timesheets* view opens by default.

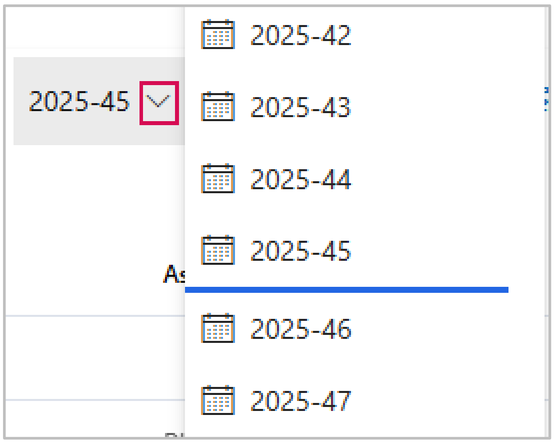


You can switch to other views using the drop-down menu:

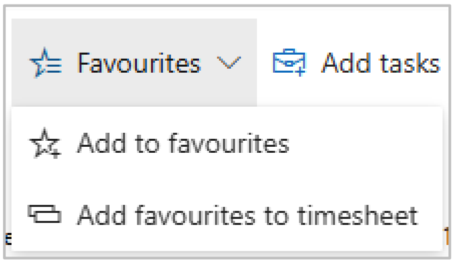


Below the drop-down menu, you will find a command bar. The following commands are available for time reporting:

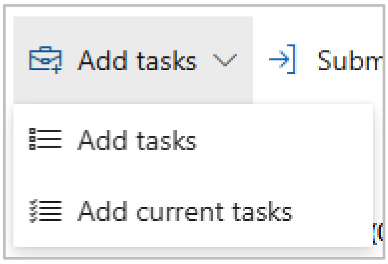
- Jump back to the previous week (1)
- Jump to the current week (2)
- Jump to the next week (3)
- Open list of all available time periods (4)



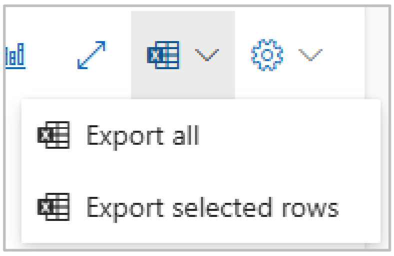
- Open the *Favourites* drop-down menu (5)



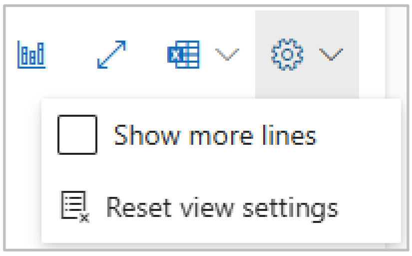
- Open the drop-down menu for adding tasks to Timesheets (6)



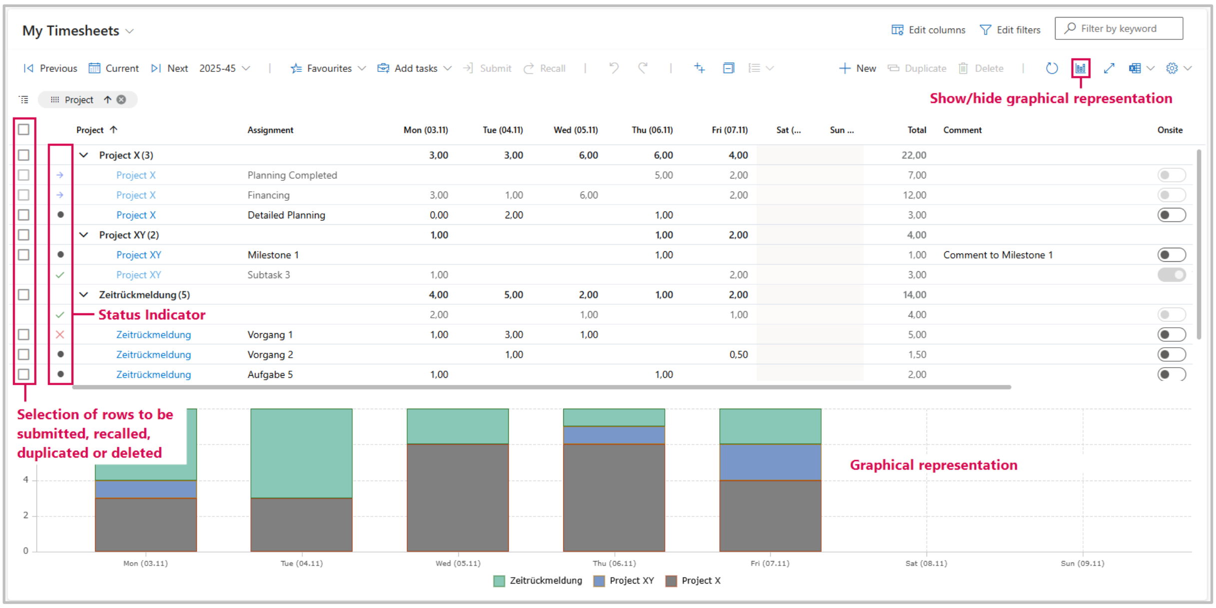
- Send selected rows for approval (7)
- Recall selected rows after sending (8)
- Undo last action and repeat last undone action (9)
- Collapse and expand rows in the table and expand up to a specific point (10)
- Add a new row to the table (11)
- Duplicate selected rows (12)
- Delete selected rows (13)
- Reload page (14)
- Shows or hides a graphical representation of the time spent per project (15)
- Expands and opens the page content in a separate window (16)
- Export all or selected rows to Excel (17)



- Open drop-down menu to display more rows per page or reset display settings (18)



Overview Timesheets:



Explanation of status indicator:

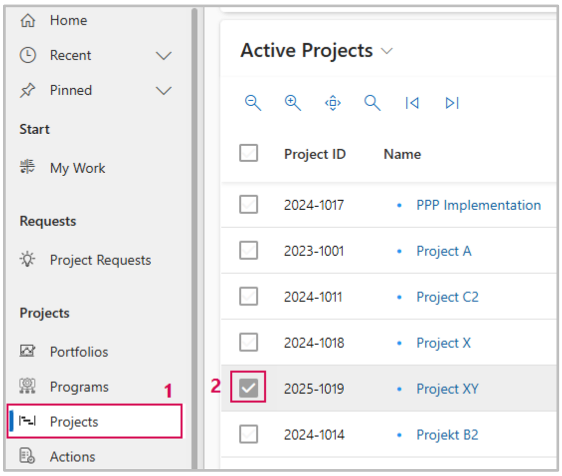
- Dot = Draft
- Blue arrow = Submitted
- Green check mark = Approved
- Red cross = Rejected

21.2 Assign permissions

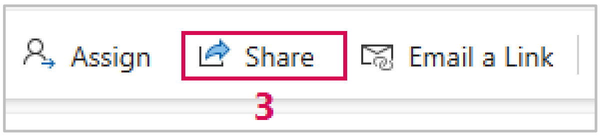
Members of the project team without comprehensive permissions in PPP can only record their working hours if the project has been approved for them.

Here's how you can give selected individuals the necessary permissions:

- Click on *Projects* in the Navigation bar 18. (1)
- Select the project from the list by clicking on the checkbox (2).

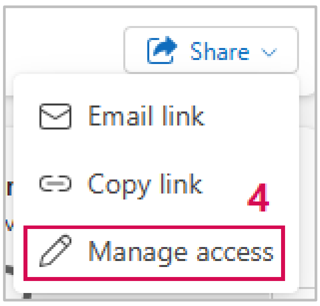


- Click *Share* in the Command bar 14 (3).



Or

- Click *Share* in the Command bar 14 in the open project. ▶ The drop-down menu opens.
- Click *Manage access* (4).



➢ Click in the *Add user/team* field and search for a team member (5).

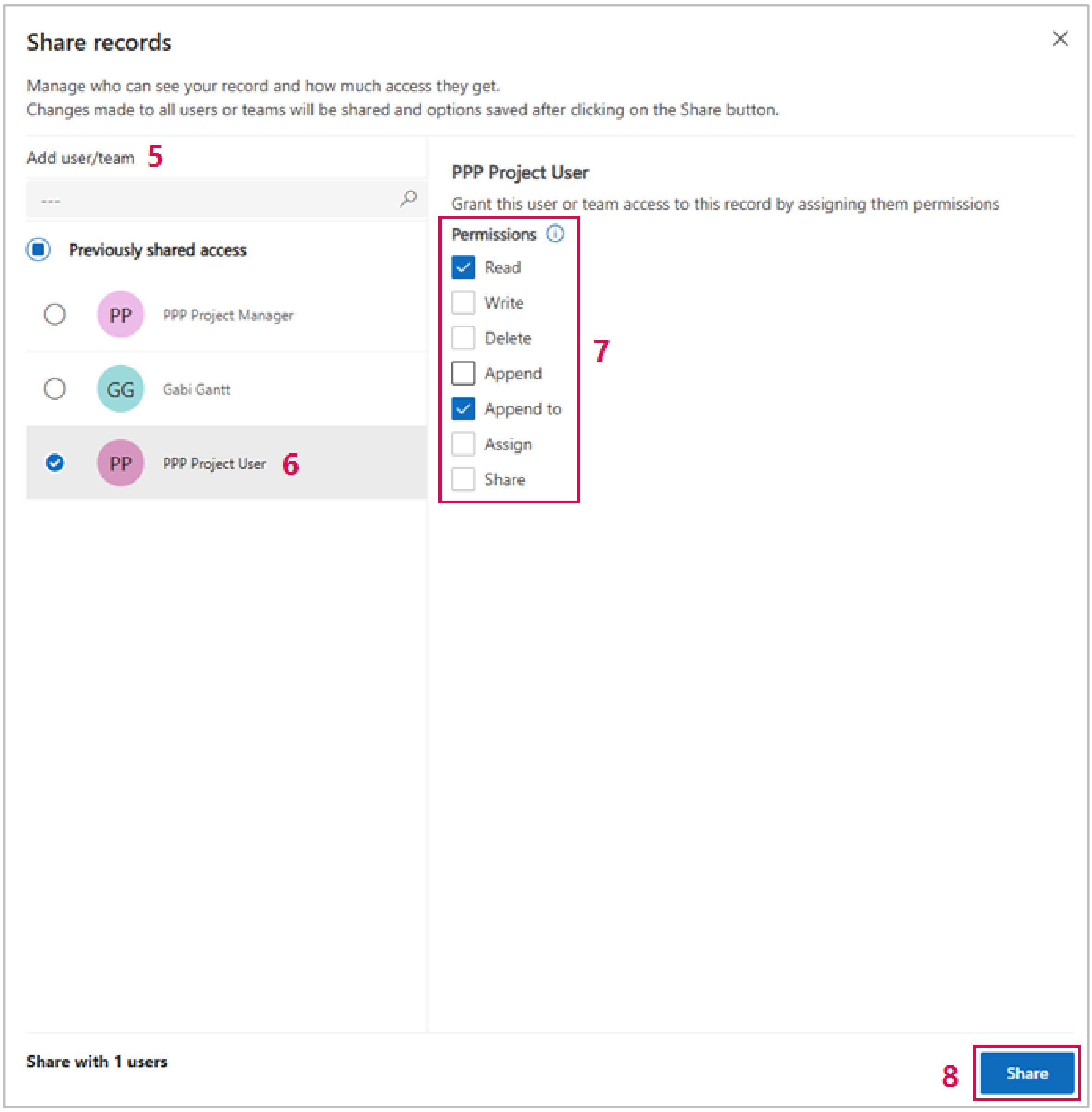
➢ Select the person from the search results.

➢ Click on the person's name or activate the checkbox (6).

➢ Under *Permissions* (7), select at least *Read* and *Append to*.

➢ Click on *Share* (8) in the bottom right corner.

▶ The project has been shared with the person in question. They are now authorized to record times.



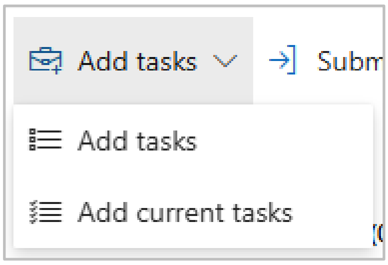
21.3 Add tasks to Timesheets

There are three ways to add a task to Timesheets:

1. Insert a task using the *Add tasks* drop-down menu.
2. Create a new row in the table.
3. Insert existing tasks that are marked as favorites into the table.

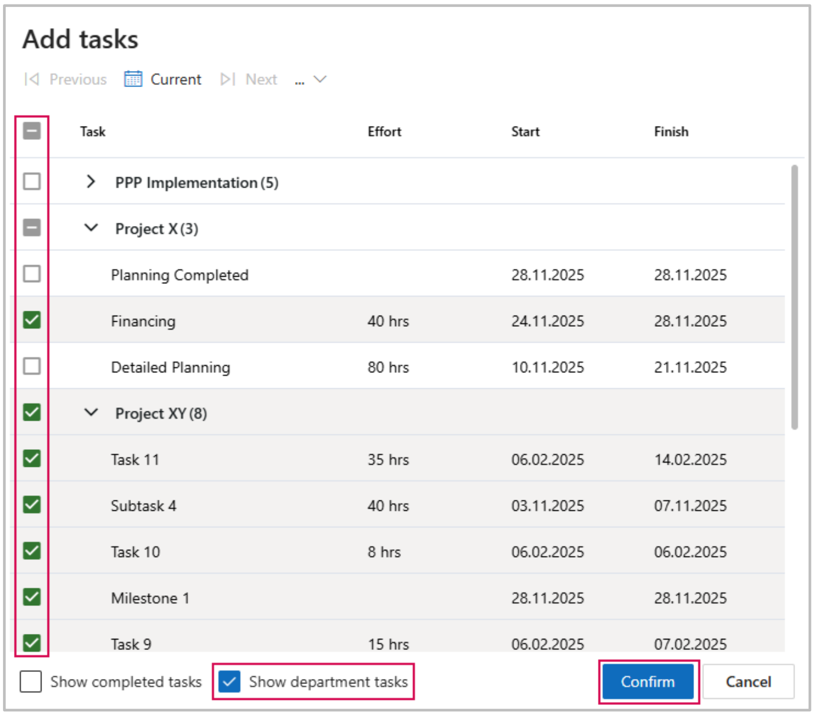
***Add tasks* drop-down menu:**

➢ Click on *Add tasks*. ▶ The drop-down menu opens.



➢ Click on *Add tasks*. ▶ All projects that contain tasks in the selected time period are displayed.

➢ Select the task you want to add to the table by clicking on the checkbox.



➢ (Optional) Select the *Show department tasks* option to also select tasks that are assigned to generic resources in your department.

▶ Advantage: This allows you to record team- or department-related tasks, even if they are not specifically assigned to you. This means that team-related activities can be booked independently without having to duplicate or reschedule processes for individual persons. This speeds up time recording and facilitates collaboration on jointly responsible tasks.

▶ If the *Show department tasks* checkbox is not available or is not displayed, it must be activated by the administrator.

Or

➢ Click on *Add current tasks* to insert all tasks that take place in the selected period.

➢ Click on *Confirm*.

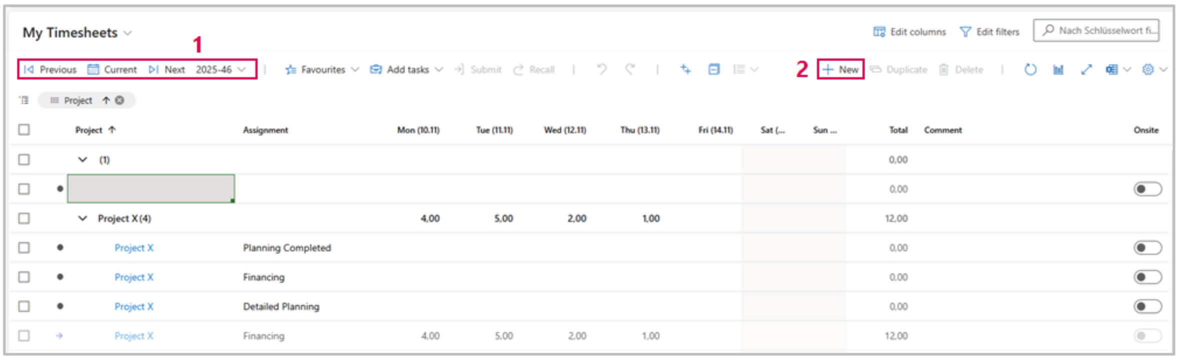
▶ The selected tasks are added to the Timesheets table.

Add a new row to the table:

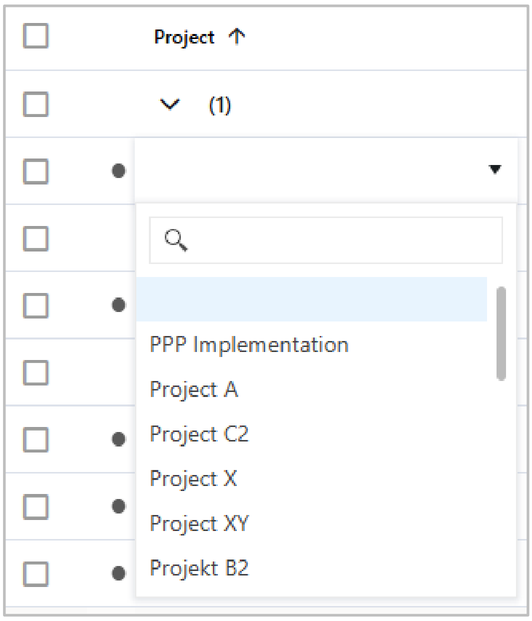
➢ Navigate to the week in which you want to add tasks. (1)

➢ Click *New*. (2)

▶ A new row appears in the table.



➢ Click in the *Project* cell. ▶ A drop-down menu opens.



➢ Select the desired project.

Use favourites:

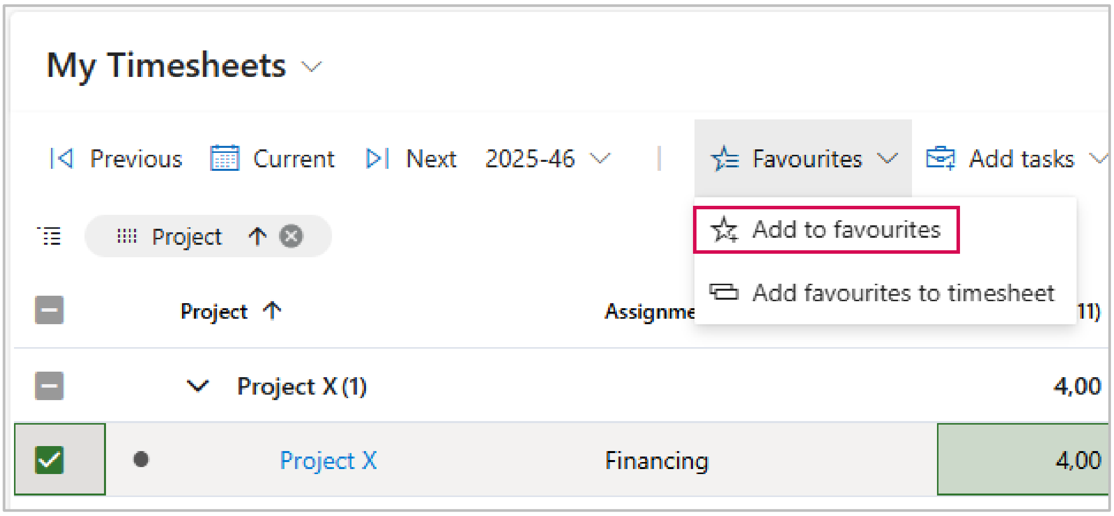
Favourites allow you to transfer existing tasks to other weeks. The transfer can be done with or without recorded working hours.

Marking favourites:

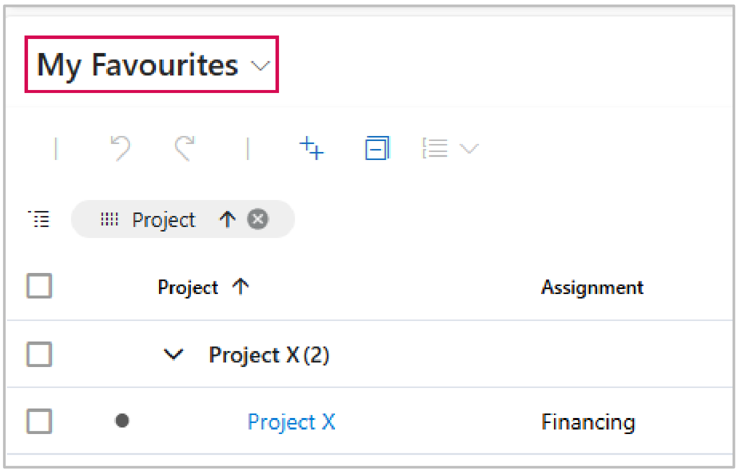
➢ Check the box for the task you want to mark as a favourite.

➢ Click on *Favourites*. ▶ The drop-down menu opens.

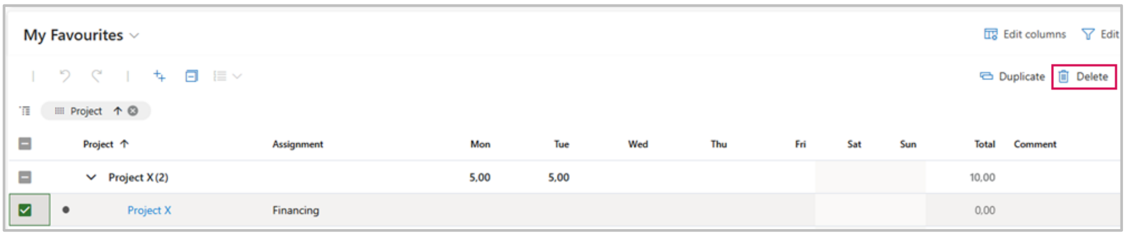
➢ Select *Add to favourites*.



▶ The selected task will be displayed in the *My Favourites* view.



▶ If you no longer need a favorite, delete it from the *My Favourites* view.

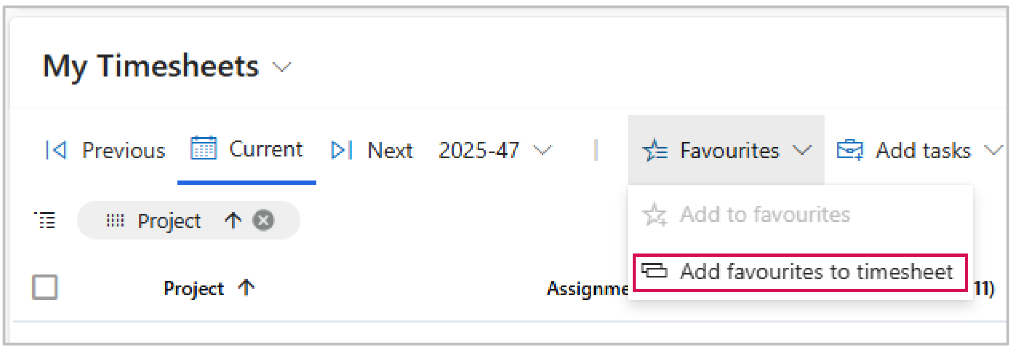


Insert favourites:

➢ Navigate to the week in which you want to insert the favourites.

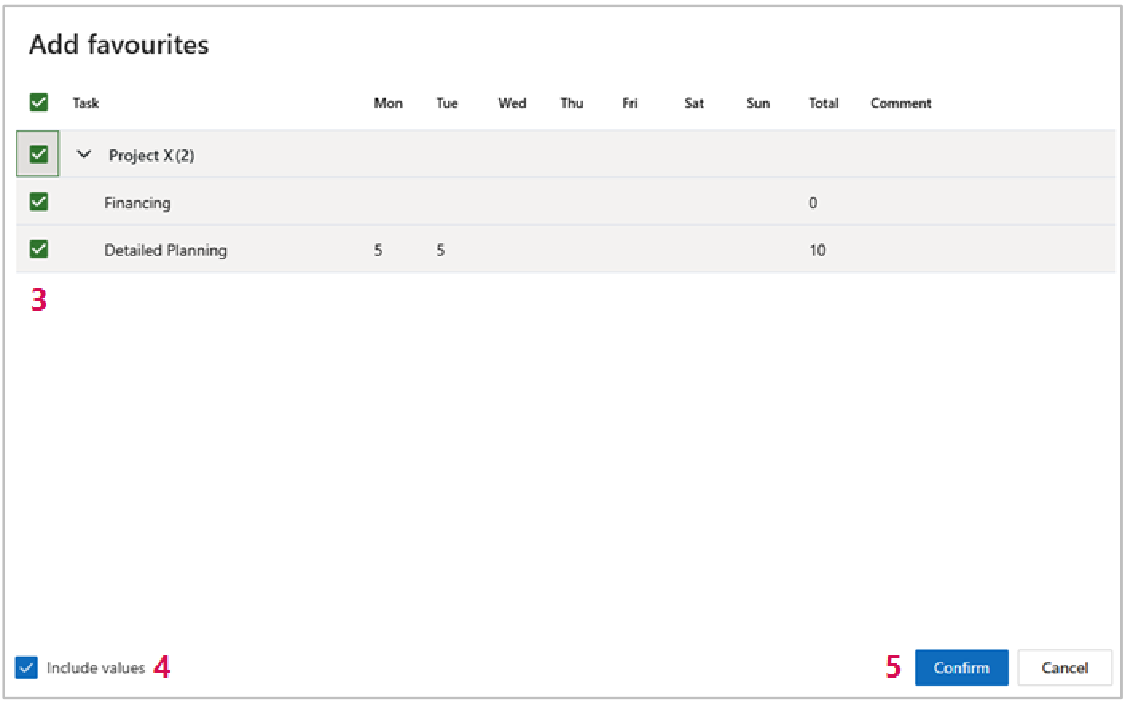
➢ Click on *Favourites*.

➢ Click on *Add favourites to timesheet*. ▶ A form will open.



➢ Select the tasks you want to insert. (3)

- Check the *Include values* checkbox to transfer the working hours of the task. (4)
- Click *Confirm*. (5)



▶ The tasks are added to the desired week.

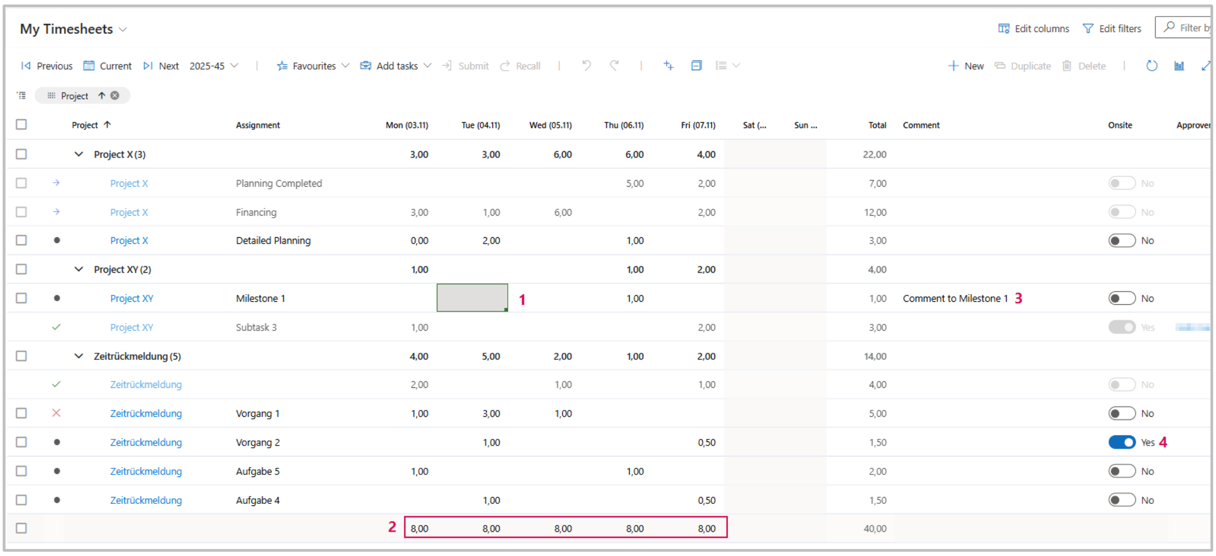
21.4 Record working time

Record your working time for the desired week as follows:

- Navigate to the week for which you want to record your working times. If the required activity is not available in the table, add it (see Add tasks to Timesheets 245).
- Enter the number of hours worked for each day and task in the table. (1)

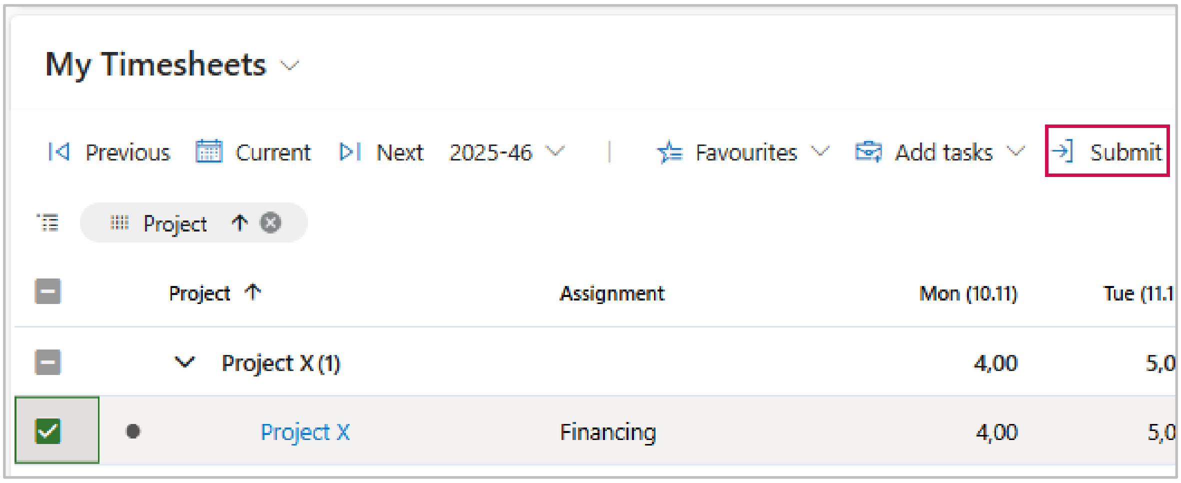
▶ The last row shows the total number of working hours for all entries in the column. (2)

- Enter details or comments for the person approving the entry in the *Comment* column (optional). (3)
- If the work took place on site, set the value in the *Onsite* column to *Yes*. (4)

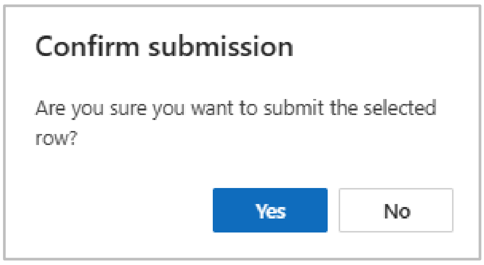


Submit entries for approval:

- ➢ Select the checkbox for the row(s) you want to submit for approval.
- ➢ Click *Submit* to send the entry. ▶ A confirmation dialog will open.

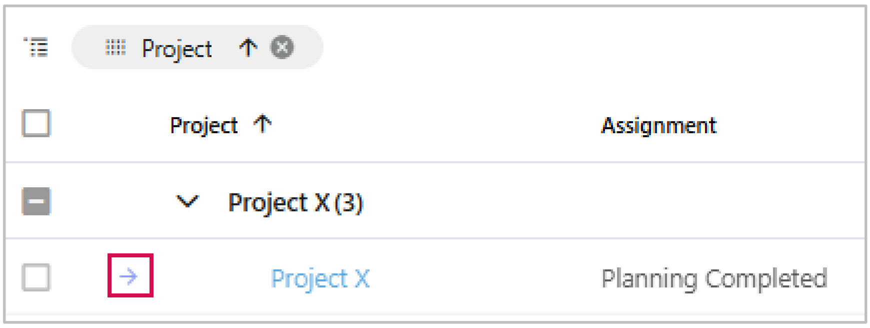


- ➢ Click *Yes* to confirm the confirmation dialog.



▶ The transaction(s) have been submitted for approval.

▶ An arrow will appear in the indicator column.

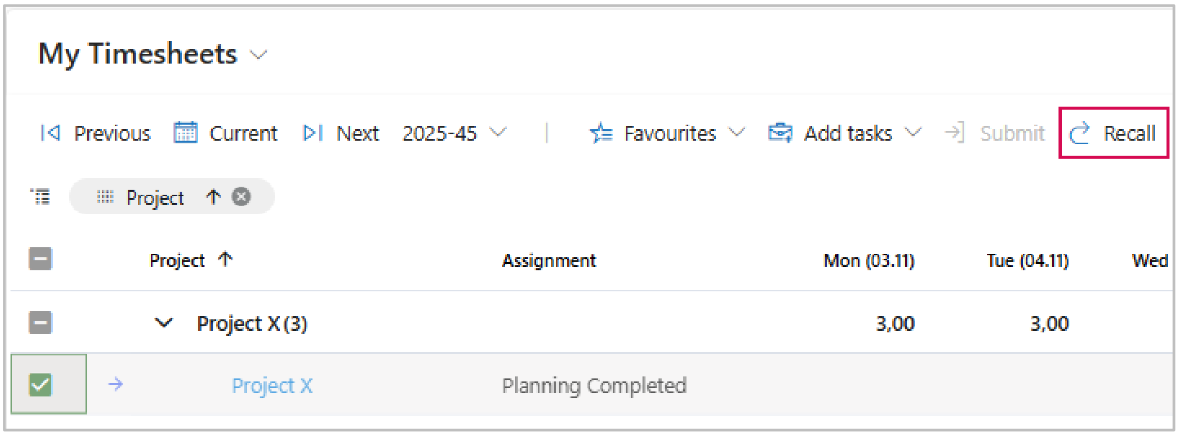


Recall entries:

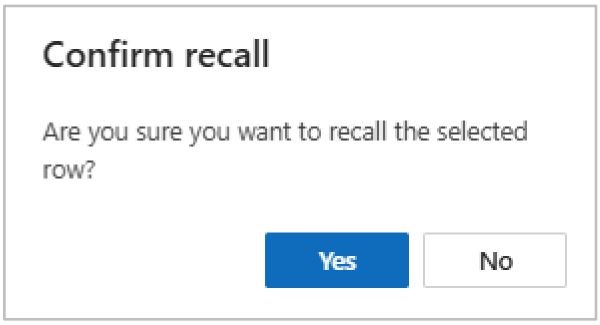
You have the option to recall entries that have already been submitted.

➢ Select the checkbox for the line you want to recall.

➢ Click *Recall*. ▶ A confirmation dialog will open.



➢ Click *Yes* to confirm the confirmation dialog.



Check approval status:

The name of the approving person is shown in the *Approver* column.

The status is shown in the indicator column:

- Green check mark = approved
- Red cross = rejected

▶ If the approving person has left a comment, it will appear in the *Approvers comment* column.

Edit rejected entries:

If your entries has been rejected, edit the line as described above. Resubmit the entry.

21.5 Approve entries

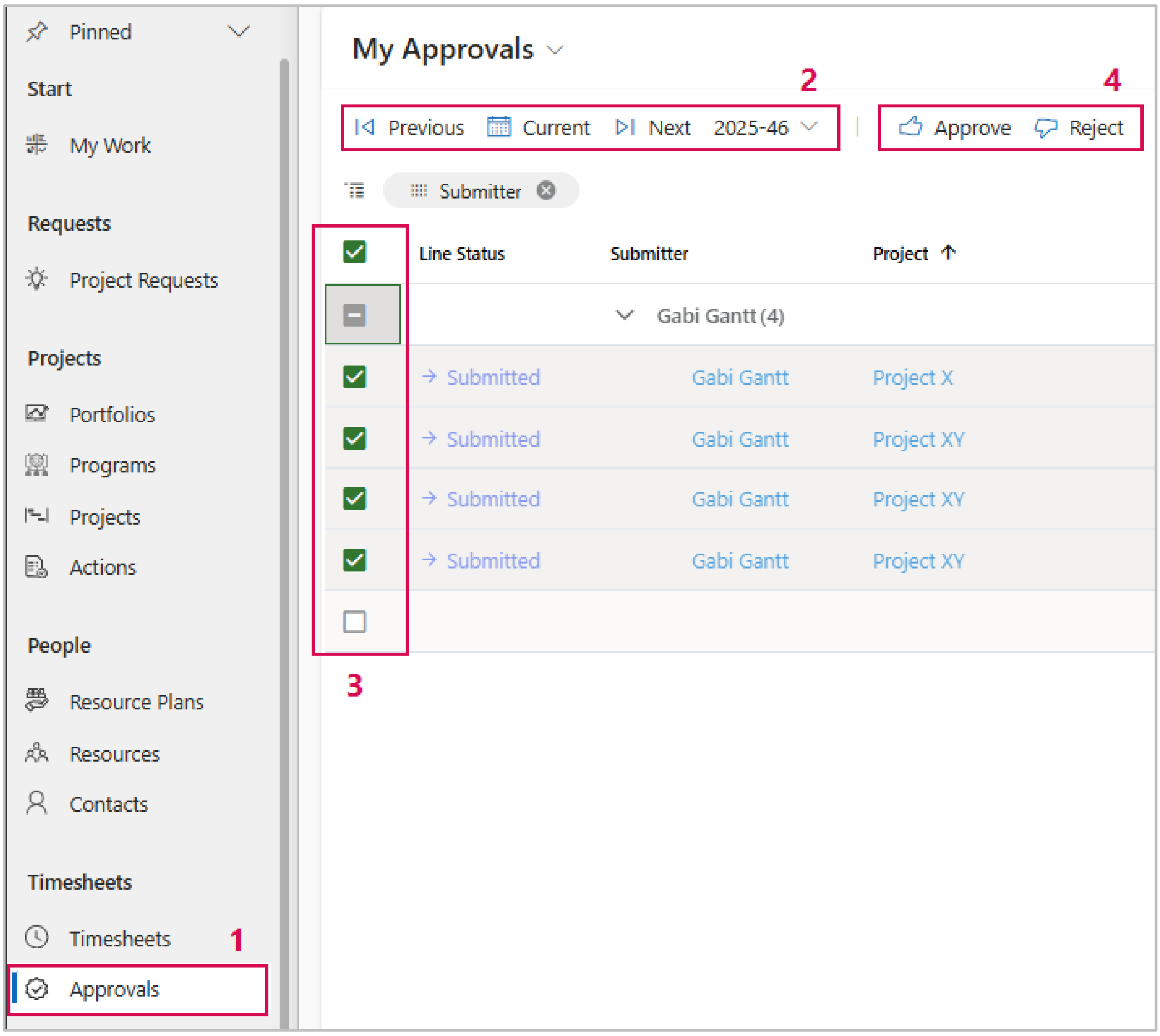
Project managers are responsible for reviewing and approving or rejecting the entries made by members of their project team. To do this, proceed as follows:

➢ Click on *Approvals* in the navigation bar. (1) ▶ The *My Approvals* view opens.

➢ Navigate to the desired week. (2) ▶ The submitted entries are displayed.

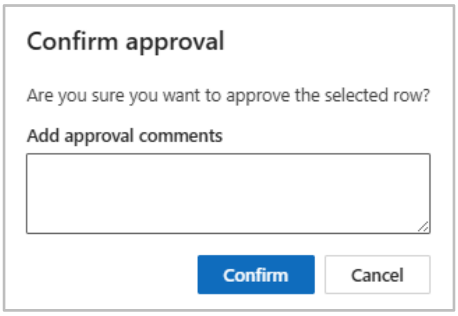
➢ Select the checkbox for the line(s) you want to approve or reject. (3)

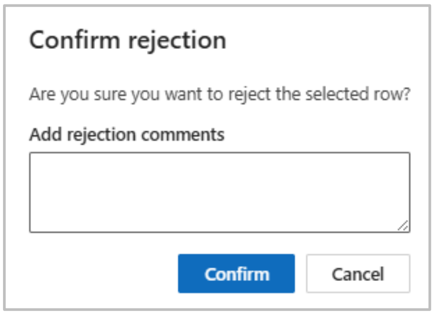
➢ Click on *Approve* or *Reject*. (4)



➢ Enter a comment for the project team member (optional). This comment will appear in the *Approvers comment* column.

➢ Click on *Confirm*.





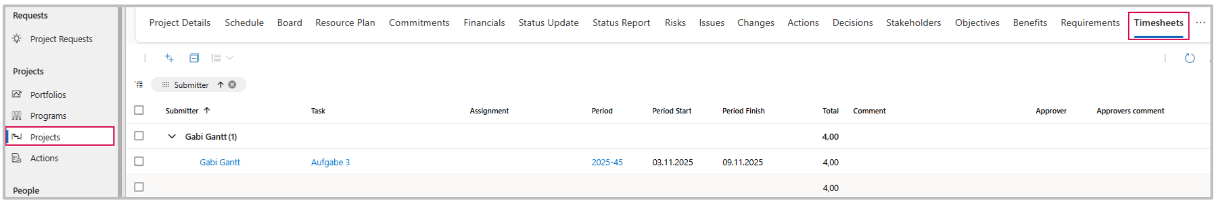
21.6 View approved entries in the project

Approved entries are listed in the *Timesheets* tab for each project.

➢ Open the desired project.

➢ Navigate to the *Timesheets* tab. (If this is not visible, click on the 3 dots on the right and select *Timesheets* from the drop-down menu).

▶ All approved entries are displayed.



▶ The approved entries for a project are also displayed as a total in the *Actual Hours* column in the scheduler.

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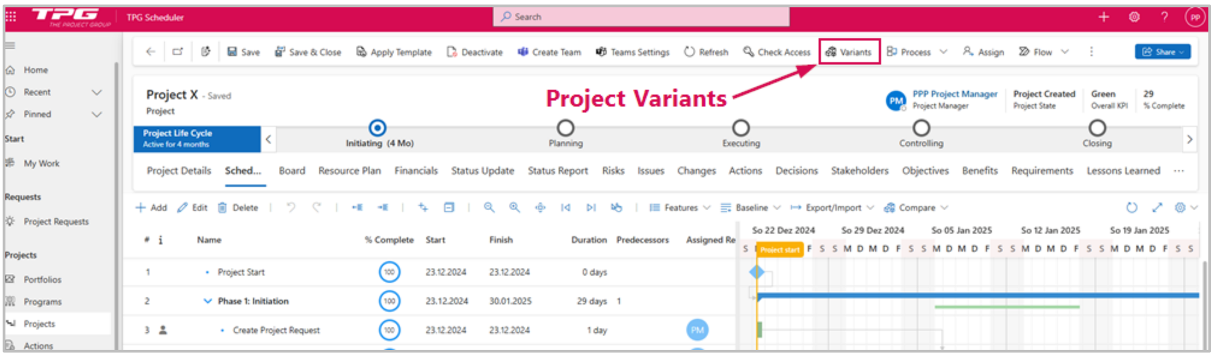
22 Project Variants

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.



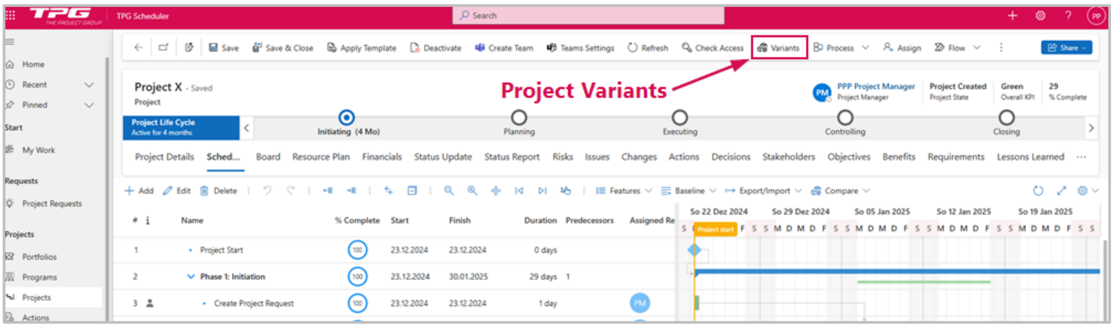
A variant is a copy of a project that can be edited without altering the original project. Variants can be compared with the original project and other variants in the schedule, resource plan, and financial plan. A new variant is created with a copy of the following tables:

- Project Details (some fields)
- Team Members
- Tasks
    - Dependencies
    - Assignments
    - Baselines
- Resource Plan
- Financials

22.1 User Interface

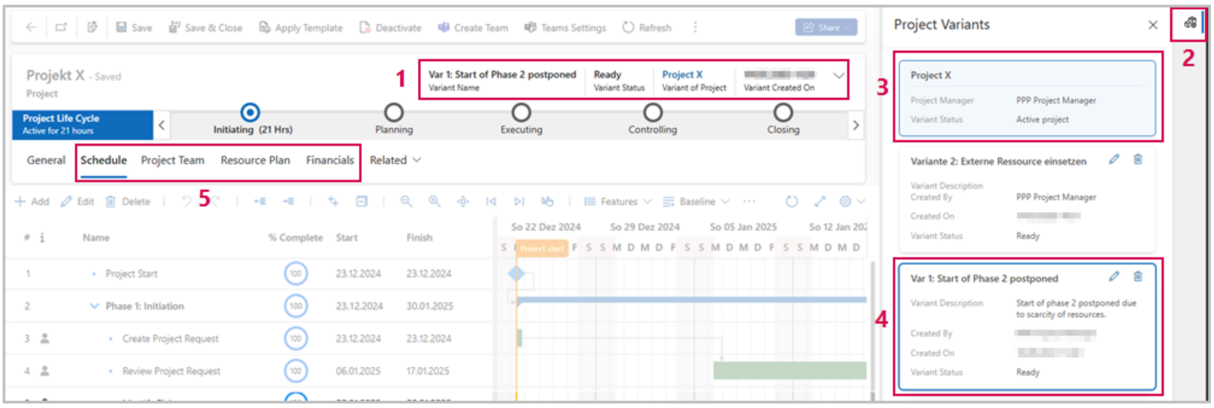
Project variants are created and opened in the *Project Variants* sidebar within the original project.

➤ To open the *Project Variants* sidebar, open the original project and click on *Variants* in the command bar [11].

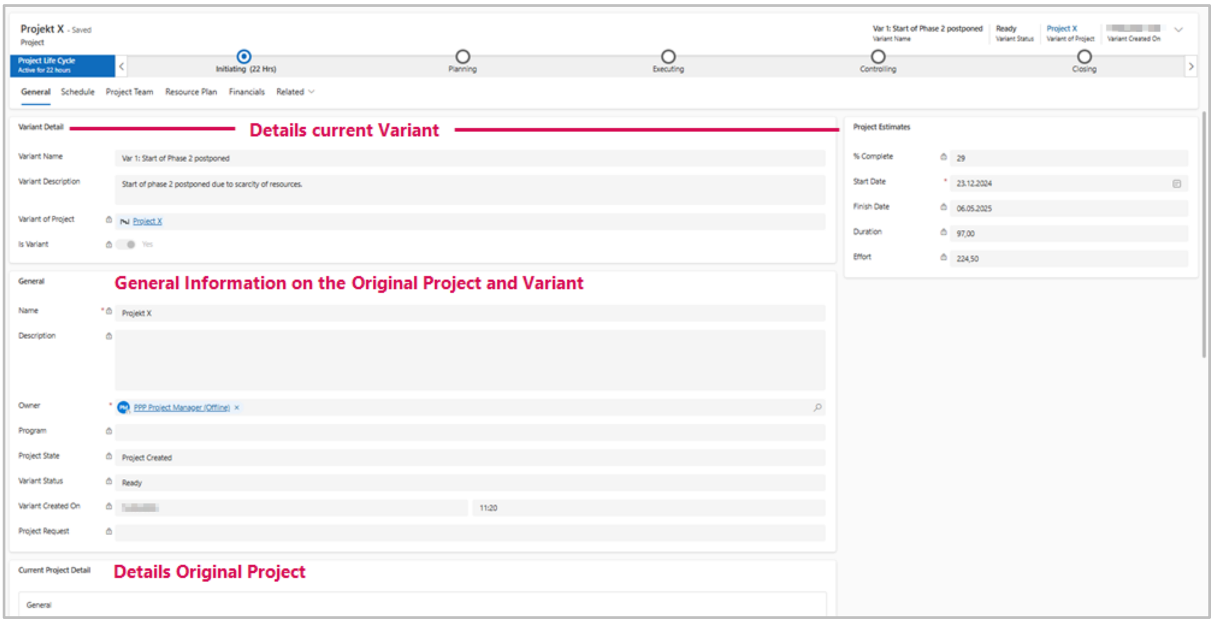


The user interface of the project variant is divided into the following areas:

- 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:



22.2 Working with Variants

In the following, you will learn how to work with variants. We will guide you step by step through the process:

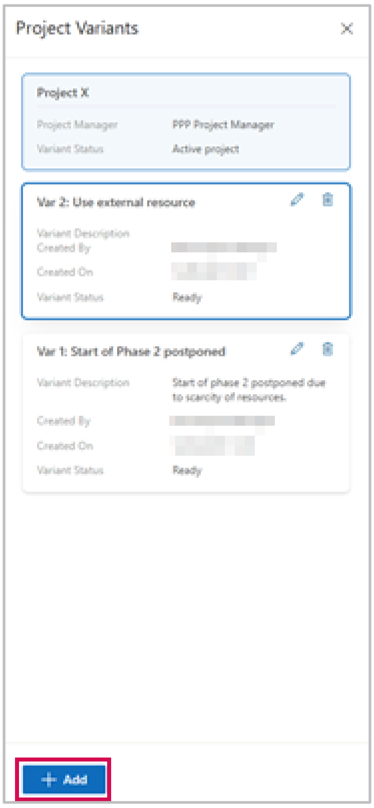
- Create a Variant 257
- Edit a Variant 261
- Compare Variants and Original Projects 264

22.2.1 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 11. ▶ The *Project Variants* sidebar will open. This area displays all previously created variants of the project.



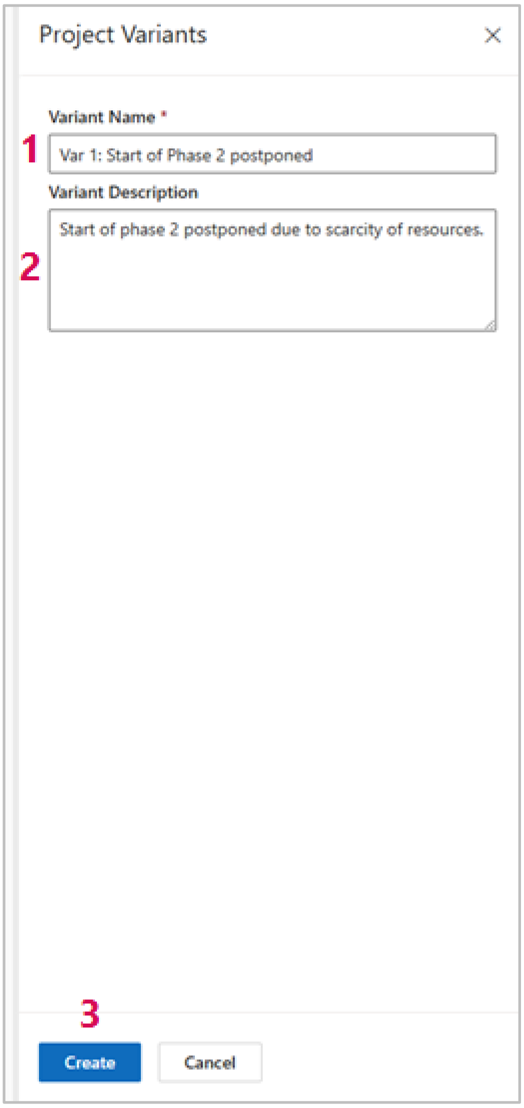
➢ Click on *Add*. ▶ The fields *Variant Name* and *Variant Description* will appear.

➢ Enter the name of the variant in the *Variant Name* field. (1)

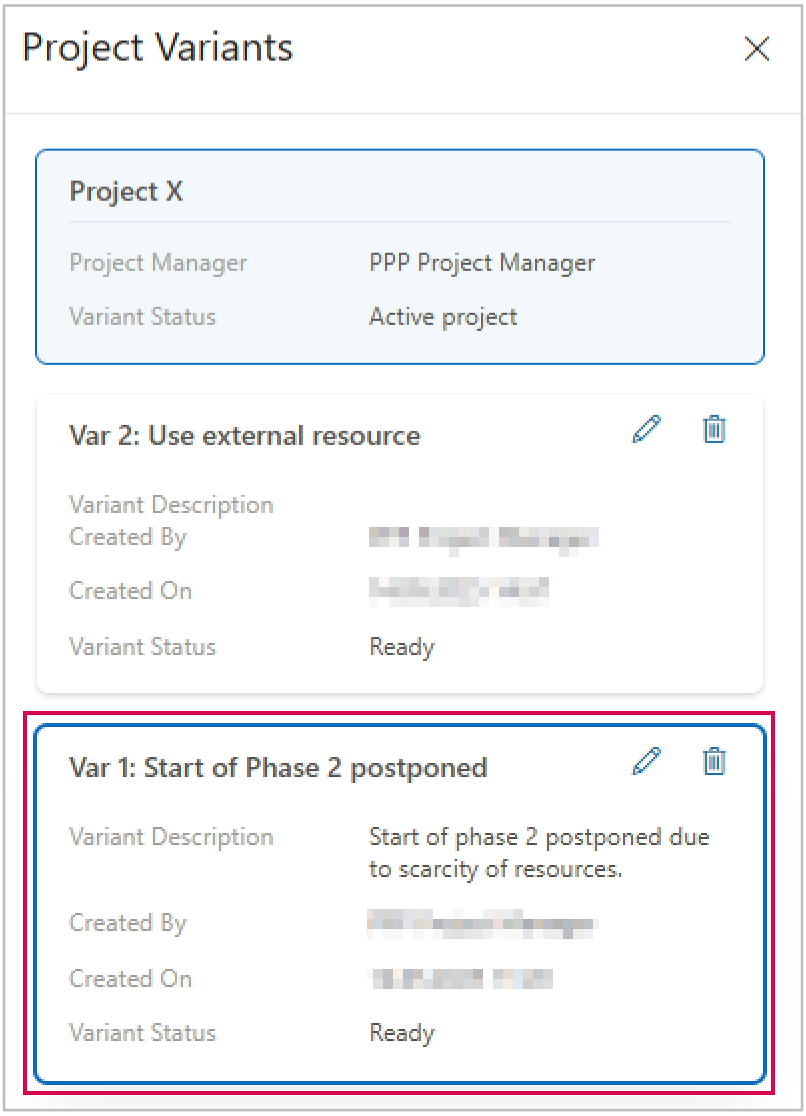
➢ Optionally, you can add a description for the variant. (2)

▶ 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)



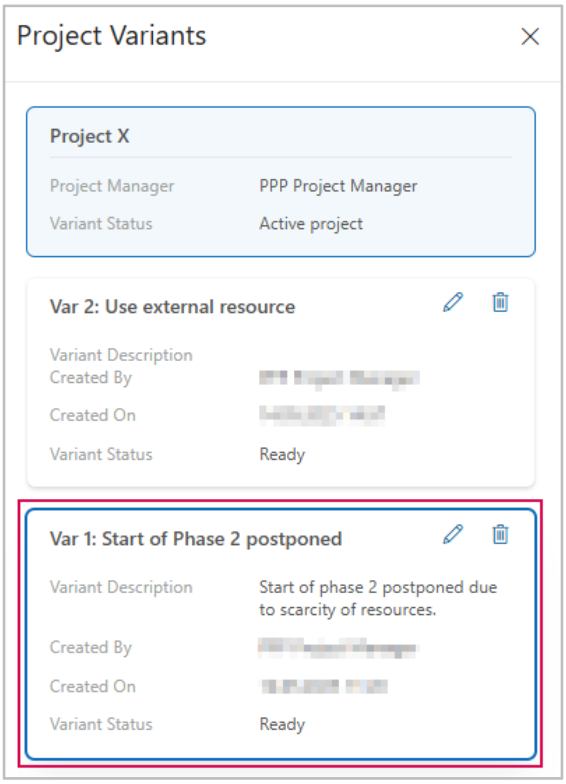
➢ The variant is displayed in the *Project Variants* sidebar under the original project.



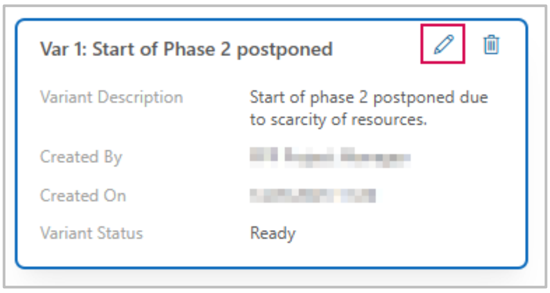
▶ The variant includes the schedule with assignments, the project team, the resource plan, and the financial plan of the original project.

22.2.2 Edit a Variant

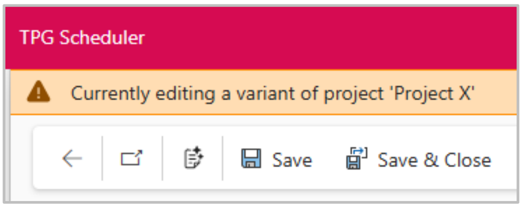
To display and edit data in a variant, select the desired variant (e.g. Var 1) in the *Project Variants* sidebar.



➢ Click on the desired variant or on the edit icon for the variant. ▶ The corresponding project plan opens.



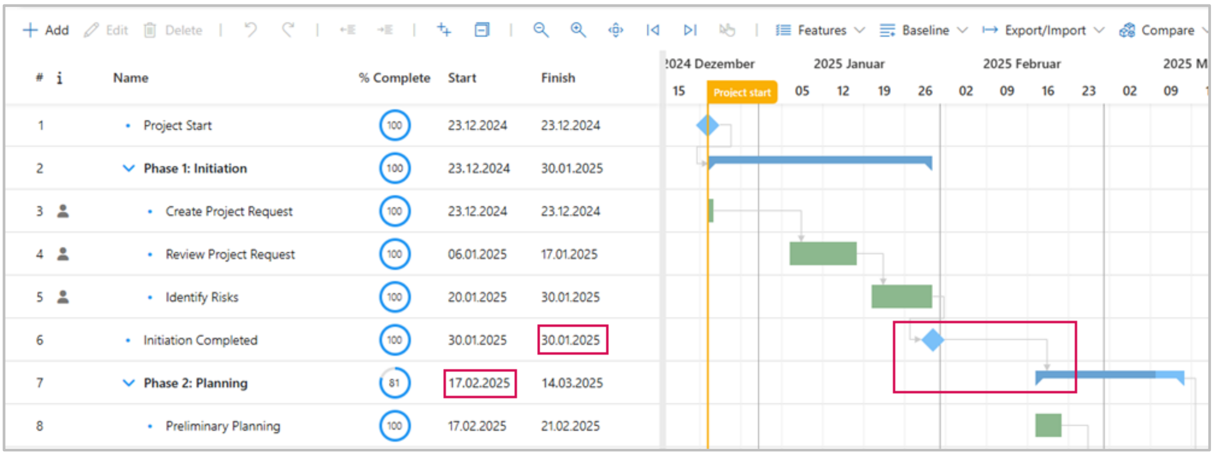
For a short time, a banner under the Header Bar 11 indicates that you are editing a variant.



➢ 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 33, Resource Planning 81 and Budget Planning 98.

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.



#	Name	% Complete	Start	Finish
1	Project Start	100	23.12.2024	23.12.2024
2	Phase 1: Initiation	100	23.12.2024	30.01.2025
3	Create Project Request	100	23.12.2024	23.12.2024
4	Review Project Request	100	06.01.2025	17.01.2025
5	Identify Risks	100	20.01.2025	30.01.2025
6	Initiation Completed	100	30.01.2025	30.01.2025
7	Phase 2: Planning	81	17.02.2025	14.03.2025
8	Preliminary Planning	100	17.02.2025	21.02.2025

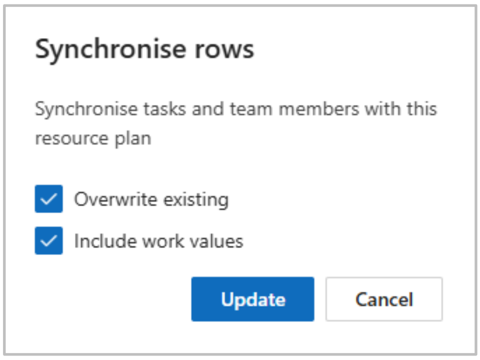
If changes are made to the schedule or assignments, the resource plan must be adjusted.

➢ Open the *Resource Plan* tab and click on *Sync*. ▶ The *Synchronize rows* dialog box opens.

➢ Click *Overwrite existing*.

➢ Click *Include working values* if you also want to transfer the working values.

➢ Click on *Update*.



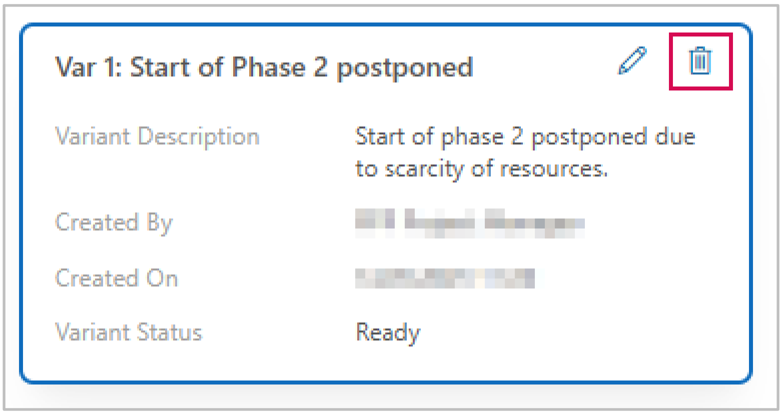
▶ There should no longer be any resource overloads in the resource plan.

➢ 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 98)

Delete Variant:

➢ In the *Project Variant* sidebar, select the variant you want to delete.

➢ Click on the delete icon.

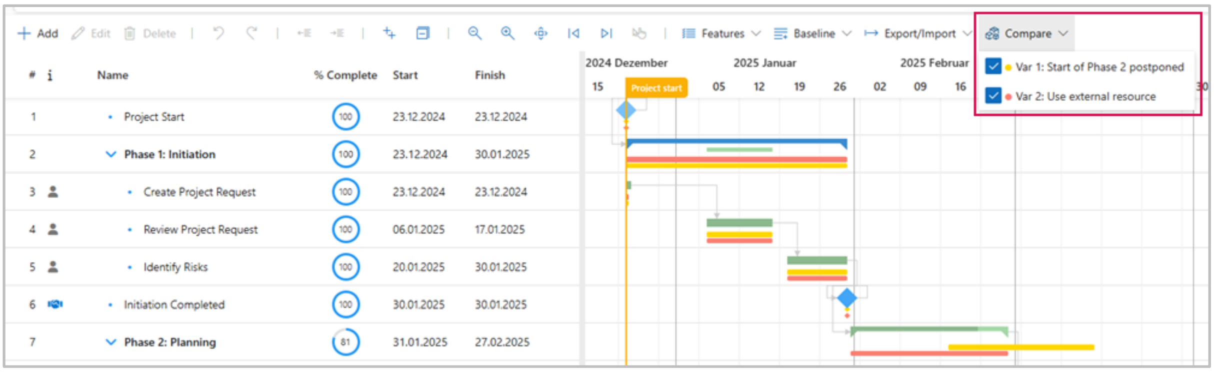


22.2.3 Compare Variants and Original Projects

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.

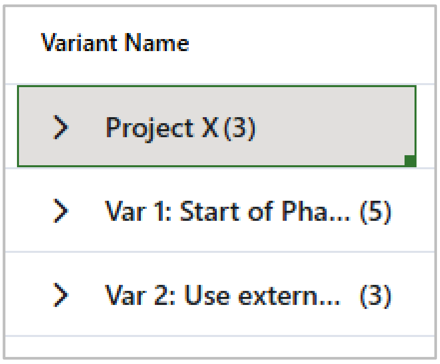
➢ Click on the variants that you want to compare with the currently open plan.



▶ 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.

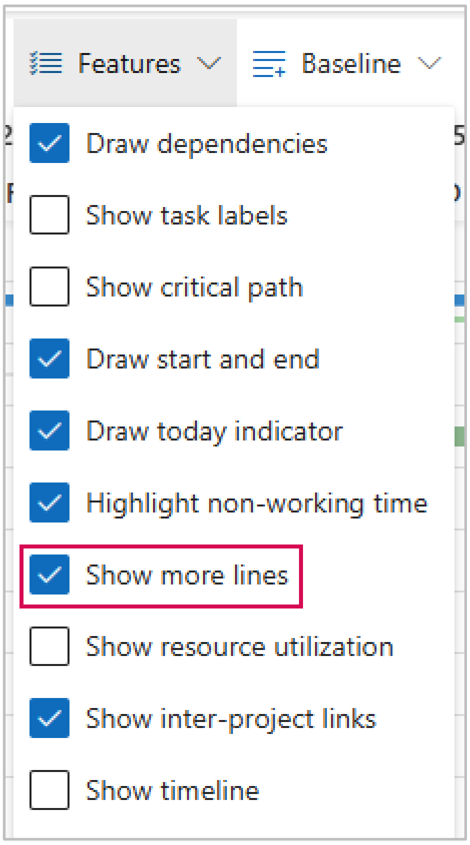
▶ On the *Resource Plan* and *Financials* tab, you can compare all variants at once. These are displayed one below the other in the table.



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*.