TPG PPP - Admin Guide 2.16 EN

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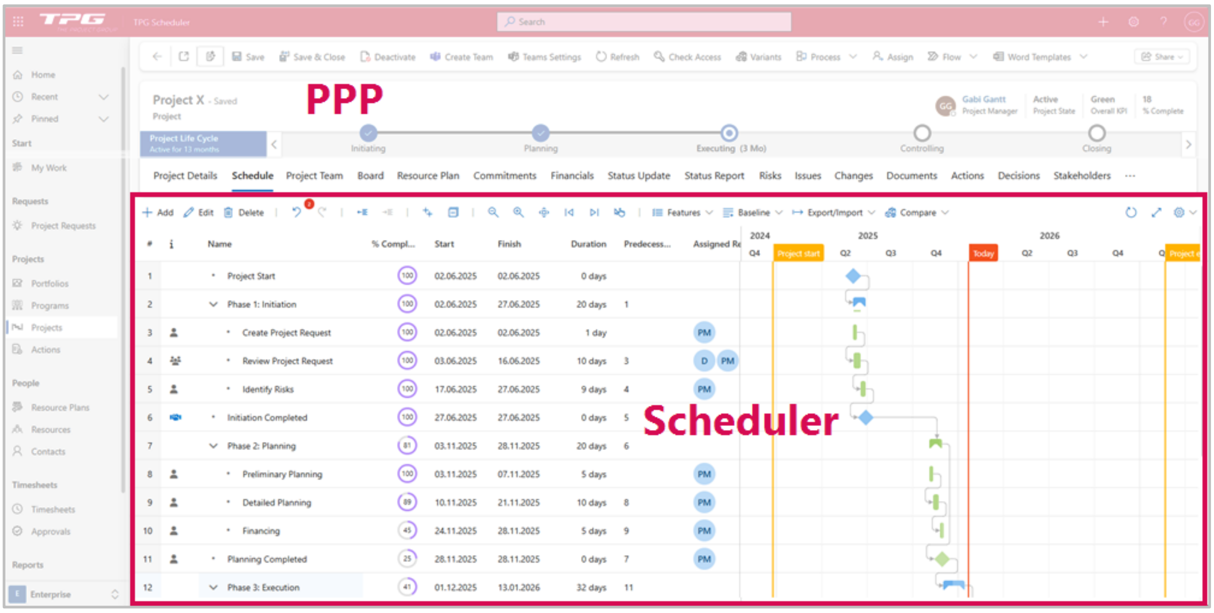
1 General Features

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

Additional apps are integrated into PPP that fulfill various tasks.

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

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



1.1 Views and Functions PPP

TPG PPP offers numerous views and functions:

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

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

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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 7
- Currency 28
- Users
- Resources and contacts
- Availability 40 (calendar)
- Departments 47
- Project Types 52
- 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 following section explains the PPP user interface, including the administration area:

- Overview 6
- Workspace 7
- Language settings 7
- Command Bar 10

- Navigation bar 13

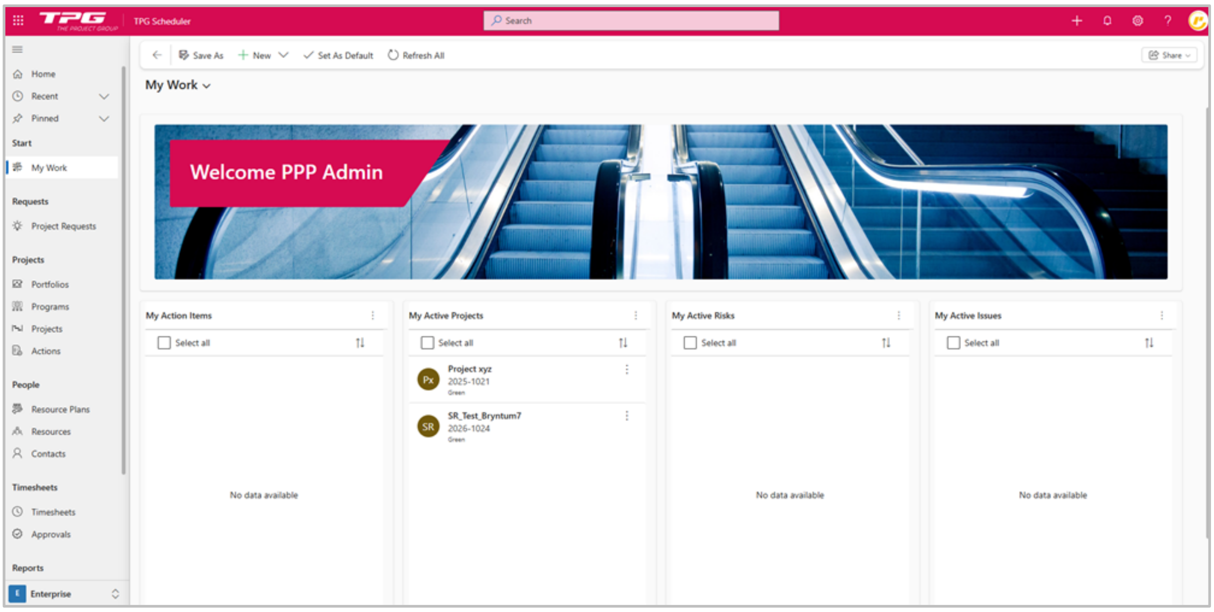
2.1 Overview

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:

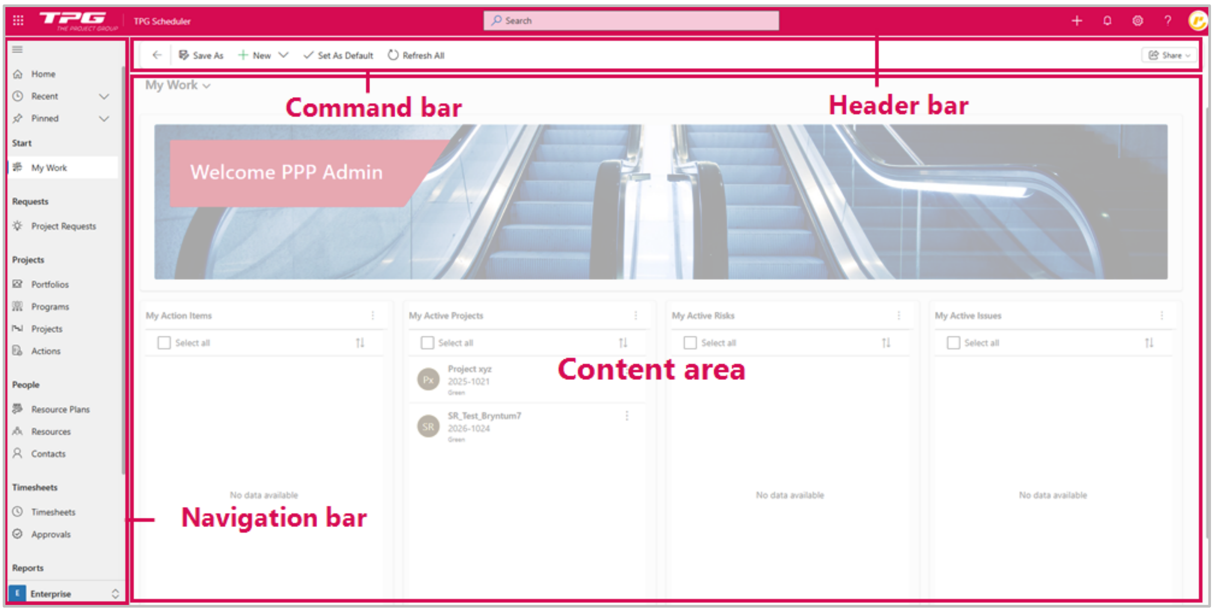
- My Actions Items
- My Active Projects
- My Active Risks
- My Active Issues



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:** 10 Buttons depending on the content area
- **Navigation bar** 13: 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



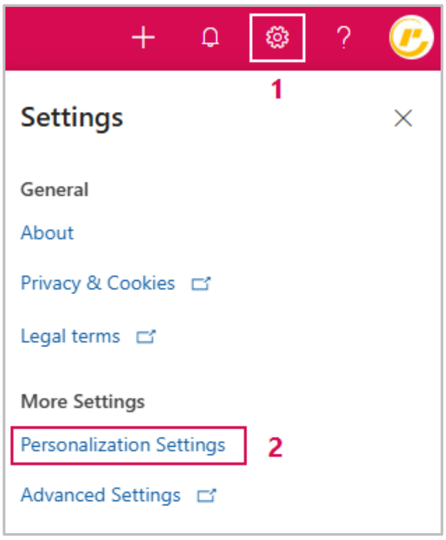
2.3 Language Settings

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)

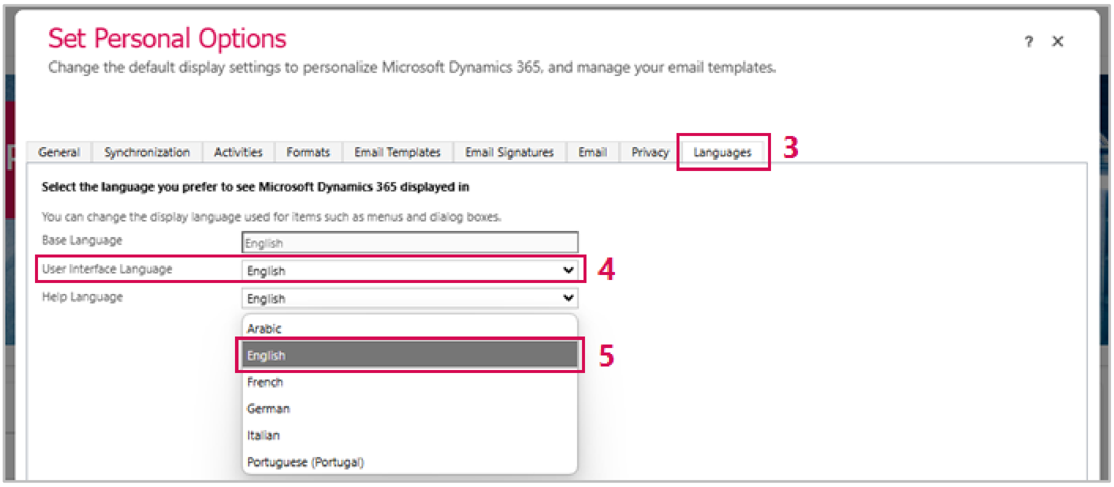
➢ Click on *Personalization Settings* (2)



➢ 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).

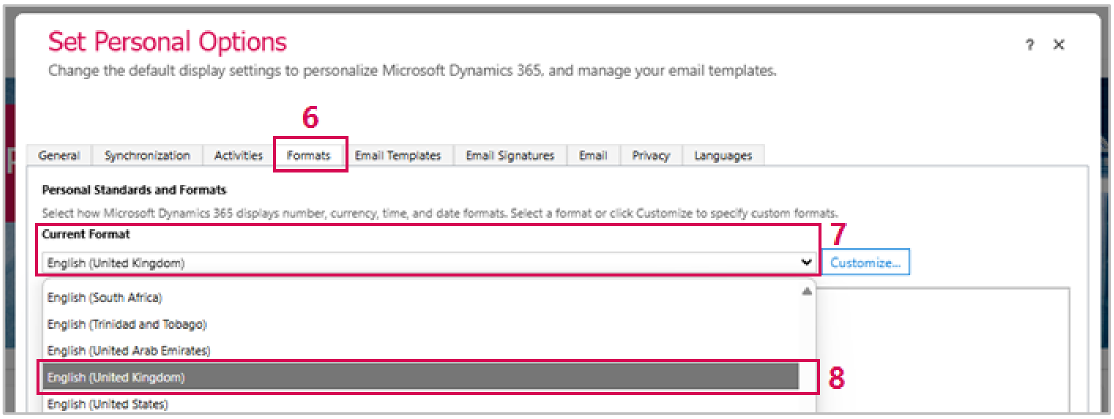


Customize formats of number, currency, time and date information:

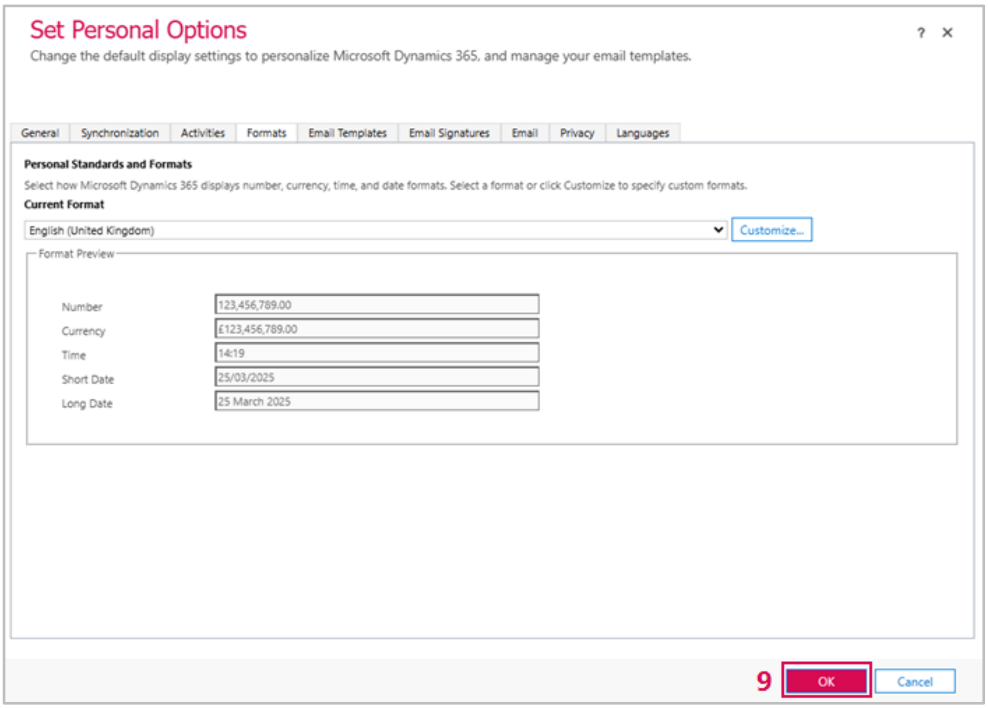
➢ Click on the *Formats* tab (6).

➢ 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.

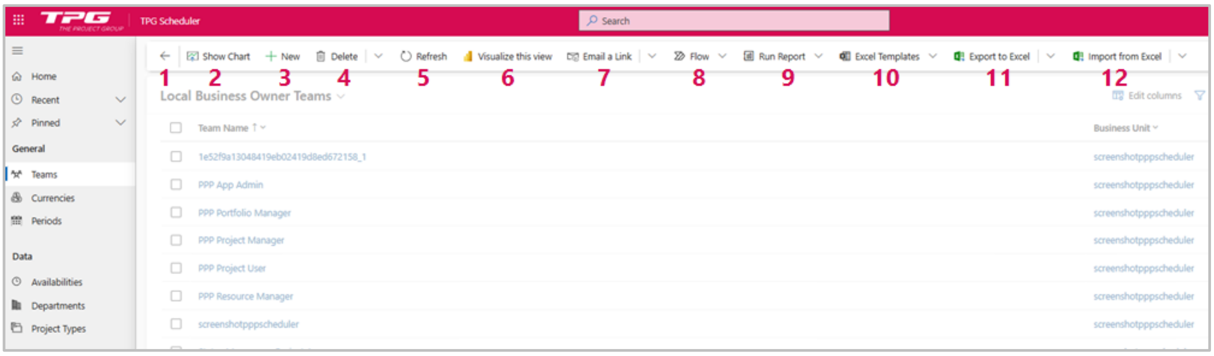
2.4 Command Bar

The Command Bar is located above the Content Area 7.

The Command Bar contains buttons that provide you with various functions depending on the Content Area (e.g., *Enterprise, Settings, Teams, Project Types*). 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 *Settings* Content Area as an example:

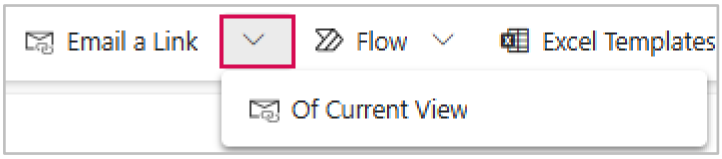


- *Go Back:* Navigates to the previously opened page. (1)
- *Show Chart:* Displays charts for the data records in the table in the Content Area. (2)
  - ➢ Click on *Show Chart* to display the chart.
  - ➢ Click on *Hide Chart* to hide the chart.
- *New:* Create a new record. (3)
- *Delete:* Deletes the selected record. (4)

⚠ This action cannot be undone.

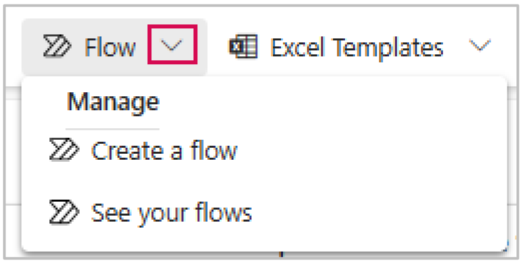
- *Refresh*: Page is being updated. (5)
- *Visualize this view*: Creation of a visual report in Power BI about the current view. (6)
- *Email a Link*: Sends a link to selected data records by email. (7)

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



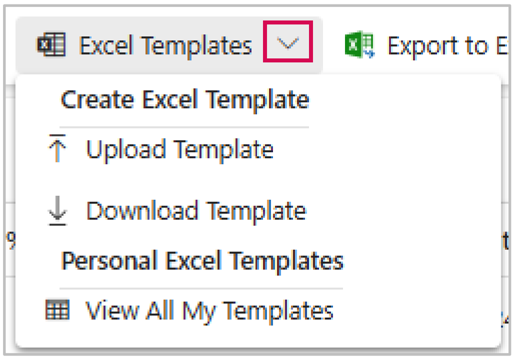
- *Flow:* Runs a Flow for the selected project. (8)

➢Click the down arrow to manage Flows.



- *Run Report:* Runs a report for the selected record. (9)
- *Excel Templates:* Creation of Excel documents or templates. (10)

➢Click the down arrow to create Excel templates.



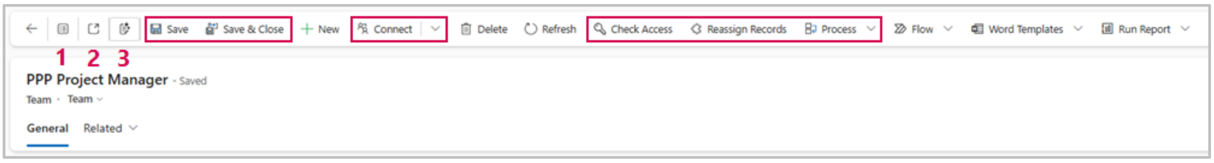
- *Export to Excel*: Exports the data to a static or dynamic Excel worksheet or to an Excel pivot table. (11)
- *Import from Excel:* Import data from Excel spreadsheet. (12)

▶ Standard chart views are displayed automatically when enabled. Most tables already contain basic charts, and additional charts can be added individually.

View with selected records

Once one or more records (e.g., *PPP Project Manager*) have been selected or marked, additional commands appear in the Command Bar:

- *Record set navigator* (1)
- *Open in new window* (2)
- *Smart paste:* Analyzes the clipboard for form suggestions (3)
- *Save*: Save the record.
- *Save & Close*: The dataset is closed after saving.
- *Connect*: Select connection roles to specify the records relationship structures
- *Check Access*
- *Reassign Records*
- *Process:* Switch process



2.5 Navigation Bar

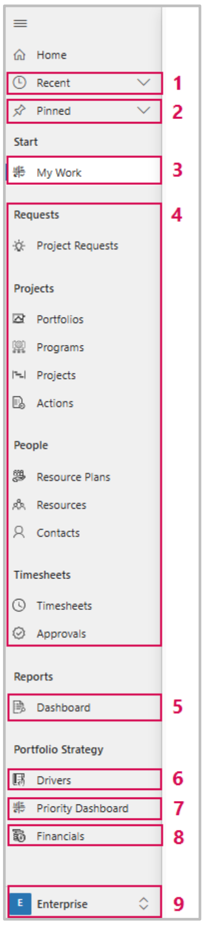
The navigation bar is located on the left side of the user interface. Depending on the section, you'll find different navigation options. There are 3 sections:

- Enterprise 17
- Settings 17
- About 62

Enterprise:

The navigation bar offers the following navigation options in the Enterprise section:

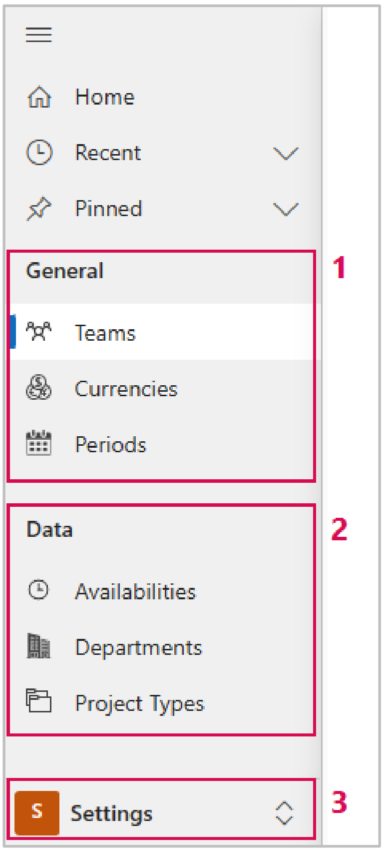
- Drop-down menu with the most recently viewed pages (1)
- Drop-down menu with the bookmarked pages (2)
- *Start:*
    - *My work*: direct access to your current actions, projects, etc. (3)
- Links to the lists with existing data records (4)
- *Reports:*
    - *Dashboard:* graphical overview of all projects, 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* 17 and *About* 62(9)


Home
Recent
1
Pinned
2
Start
My Work
3
Requests
4
Project Requests
Projects
Portfolios
Programs
Projects
Actions
People
Resource Plans
Resources
Contacts
Timesheets
Timesheets
Approvals
Reports
Dashboard
5
Portfolio Strategy
Drivers
6
Priority Dashboard
7
Financials
8
E
Enterprise
9

Settings:

The navigation bar offers the following navigation options in the *Settings* 17 section:

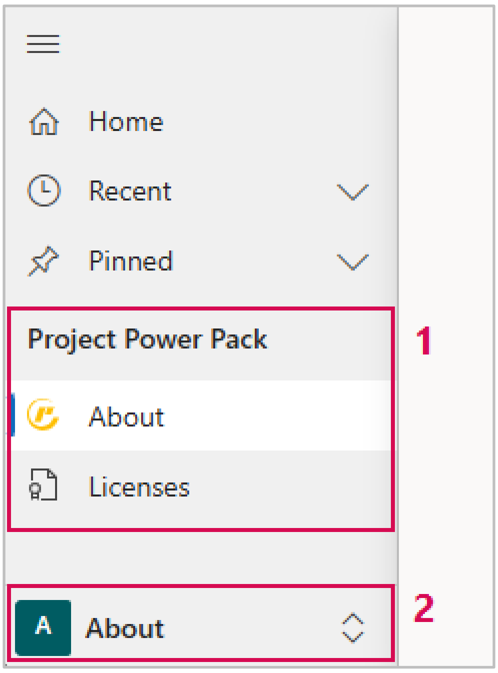
- General: (1)
  - *Teams*: Add and manage teams.
  - *Currencies*: Add and manage currencies.
  - *Periods*: Add and manage time periods based on calendar weeks.
- Data: (2)
  - *Availabilities:* Add and manage calendars for working hours and non-working hours.
  - *Departments*: Add and manage departments.
  - *Project Types*: Add and manage project types.
- Switch to the *Enterprise* 17 and *About* 62 sections (3)



About:

The navigation bar offers the following navigation options in the *About* 62 section:

- *Project Power Pack:* (1)
  - *About*: View product information
  - *Licenses*: Add and manage licenses
- Switch to *Enterprise* 17 and *Settings* 17 sections (2)



3 Areas

The *Areas* section describes the three available areas:

- Enterprise 17
- Settings 17
- About 62

Here you will find information about the data stored in each area, as well as the configuration options available in each one. It also explains how to view and edit the existing content.

3.1 Enterprise

The *Enterprise* area is the default. This is where users perform all actions related to project and portfolio management.

▶ You can find detailed instructions for this section in the PPP User Guide.

3.2 Settings

In the *Settings* area, you can configure settings and manage features. The adjustments made here affect workflows and permissions.

The area is divided into the following sections:

- General: (1)
  - *Teams* 17: Add and manage teams.
  - *Currencies* 28: Add and manage currencies.
  - *Periods* 33: Add and manage time periods based on calendar weeks.
- Data: (2)
  - *Availabilities* 40: Add and manage calendars for working hours and non-working hours.
  - *Departments* 47: Add and manage departments.
  - *Project Types* 52: Add and manage project types.

The following sections describe each section in detail and explain the respective configuration options step by step.

3.2.1 Teams

In the *Teams* section, you manage team structures. Here, you can create new teams, edit existing entries, and organize employee assignments. Team assignments are also used to assign security roles that control PPP permissions.

▶ Permissions cannot be directly assigned or modified by an administrator.

There are two types of teams:

Owner Teams

- Can own records
- Have their own security roles
- Team members receive permissions through these roles
- Suitable for permanent groups (e.g., Departments)

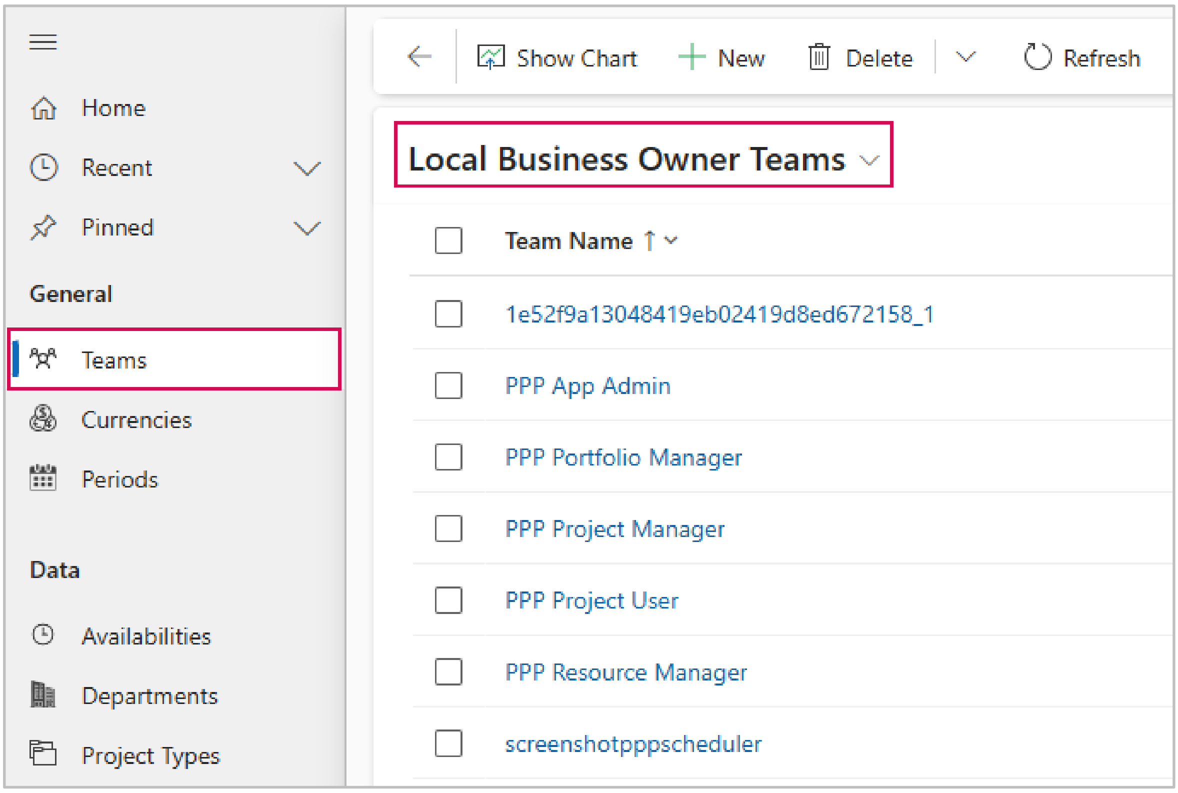
Access Teams

- Cannot own records
- Grant individual users access to specific records
- Access is granted on a per-record basis
- Suitable for temporary or project-based collaboration

In the following sections, we will guide you through all available features and show you step by step how to create, customize and manage teams.

➢ Click *Teams* in the navigation bar to open the *Teams* section.

▶ By default, the *Teams* section opens in the *Local Business Owner Teams* view.



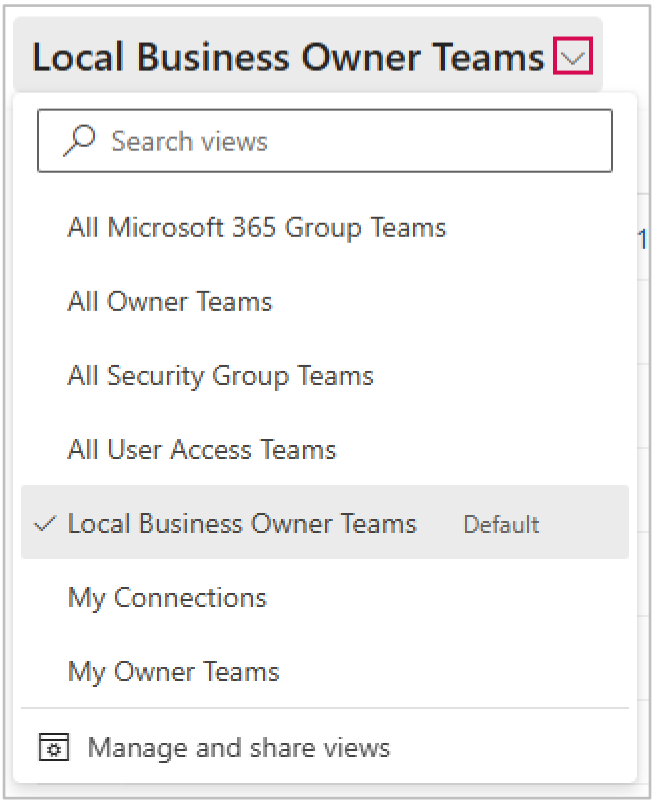
In this view, all local business owner teams are displayed in a table.

▶ Local business owner teams own and manage records within a specific business unit. The assigned security roles determine which access and editing permissions the team and its members have.

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

➤ Click the down arrow and select a view:

- *All Microsoft 365 Group Teams*: A tabular list of all Microsoft 365 group teams.
- *All Owner Teams*: A tabular list of all owner teams.
- *All Security Group Teams:* Tabular list of all security group teams.
- *All User Access Teams*: A tabular list of all user access teams.
- *My Connections*: Tabular list of all team instances to which a user is linked via an active connection.
- *My Owner Teams:* Tabular list of all owner teams to which the current user is assigned.

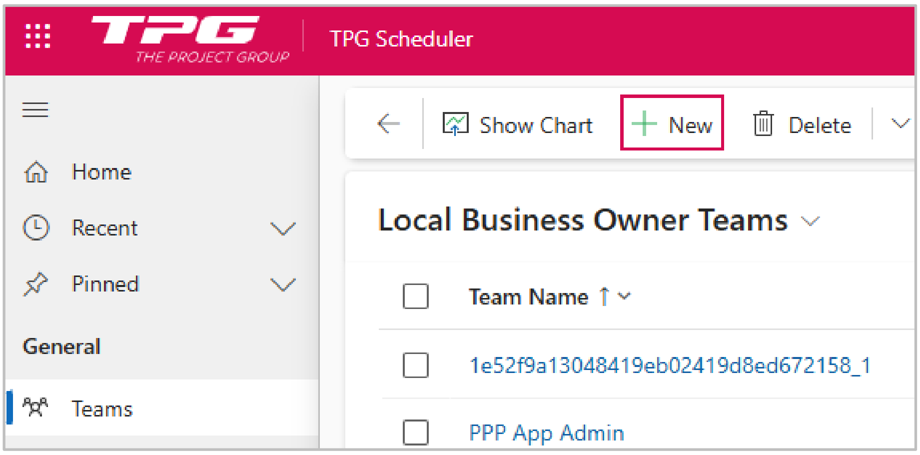


The following section describes how to create, edit, and manage teams.

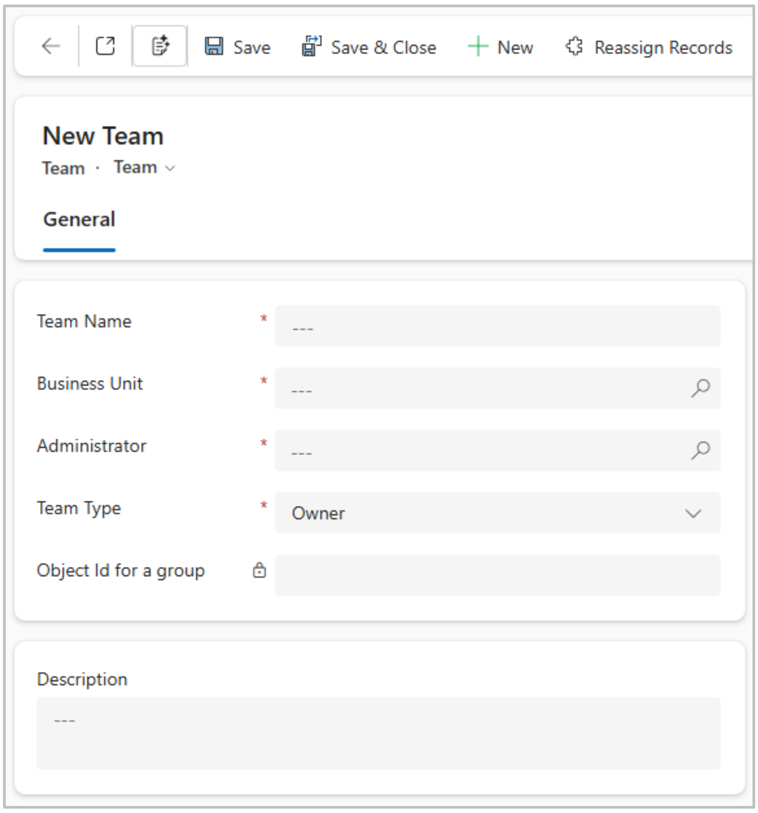
▶ The procedure is described in the default view, *Local Business Owner Teams*. The procedure is the same in the other views.

Create a Team:

➢ Click *New* in the command bar. ▶ The *New Team* form opens.



➢ Fill out the form:

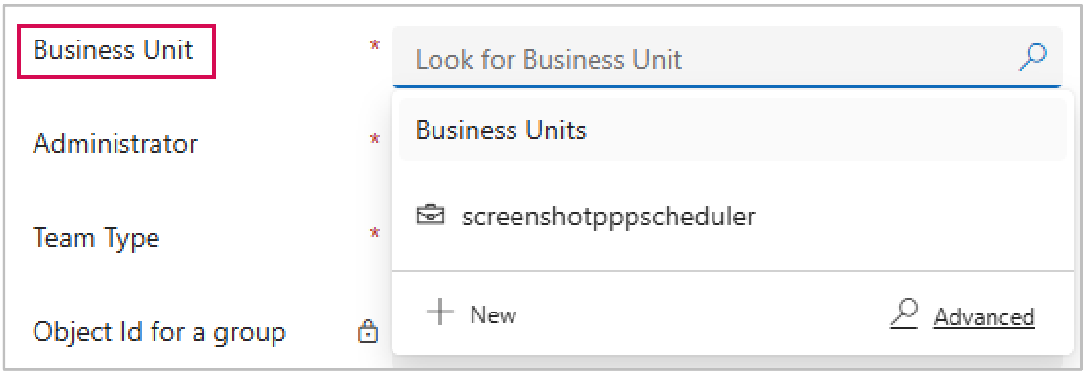


▶ All required fields are marked with a red asterisk.

- *Team Name*:
  - Enter a name for the team. It should be as descriptive as possible.
- *Business Unit*:
  - Enter the Business Unit.

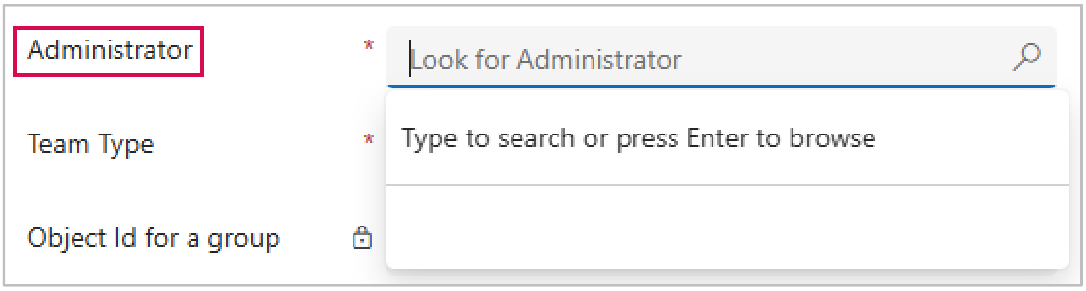
    Or
  - Press Enter to search for a Business Unit.

    Or
  - Click *New* to create a new Business Unit.



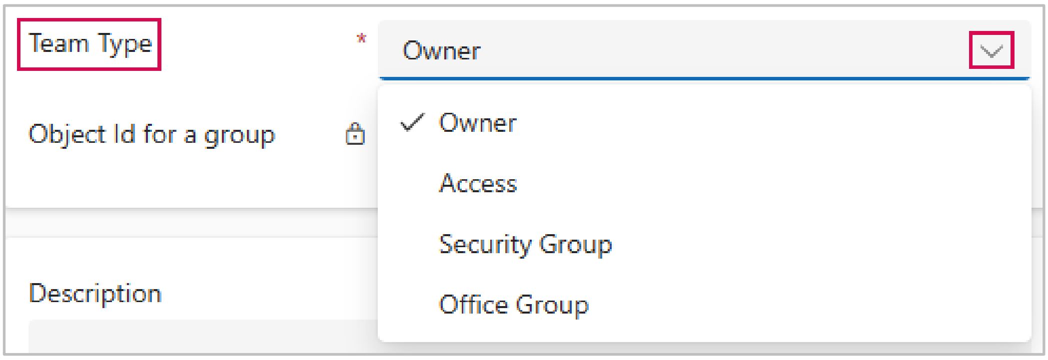
- *Administrator*:
  - Enter an administrator.

    Or
  - Press Enter to search for an administrator.



- *Team Type*:

➢ Click the arrow to select the type from the drop-down menu.



➢ *Object ID for a group*

➢ *Description*:

➢ Enter a description for the Team.

➢ Click Save or Save & Close on the command bar.

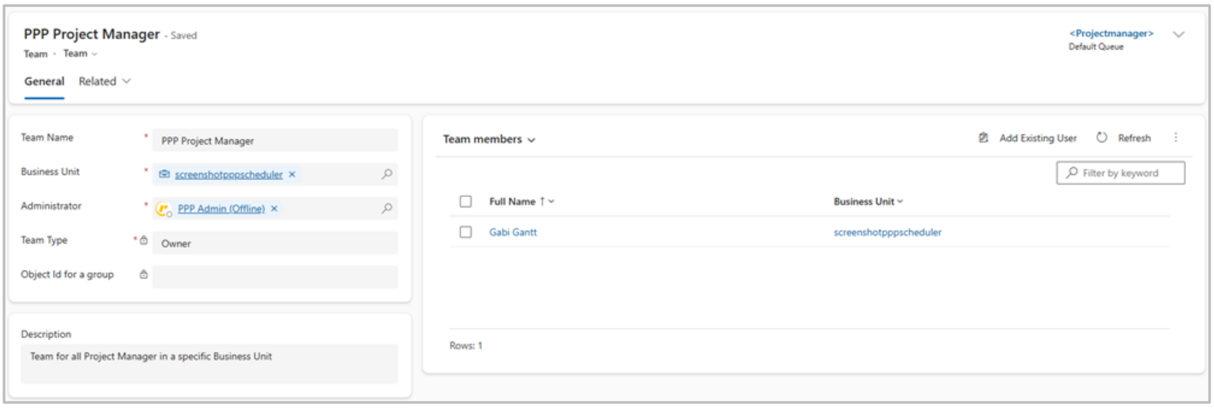
▶ A new Team has been created.

Edit Team:

Editing an existing team follows the same process as creating one: All fields that have already been created can be modified as described above.

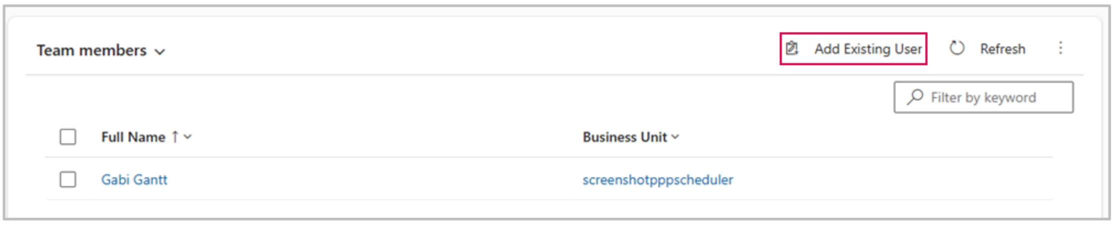
▶ Fields that cannot be edited are marked as locked with a lock icon.

- Select the team you want to edit, e.g., *PPP Project Manager*.
- In the *Local Business Owner Teams* view, click on *PPP Project Manager*. ▶ The *PPP Project Manager* form opens.

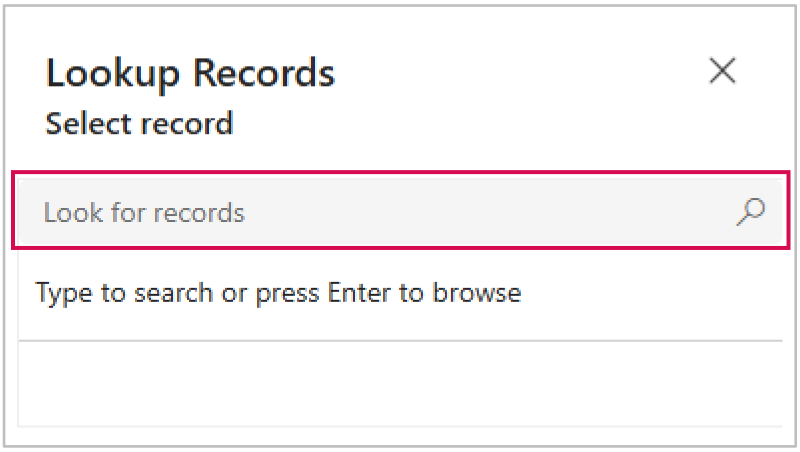


You can add new members to the team or manage existing members:

- In the *Team members* field, click *Add Existing User*. ▶ The form will open.



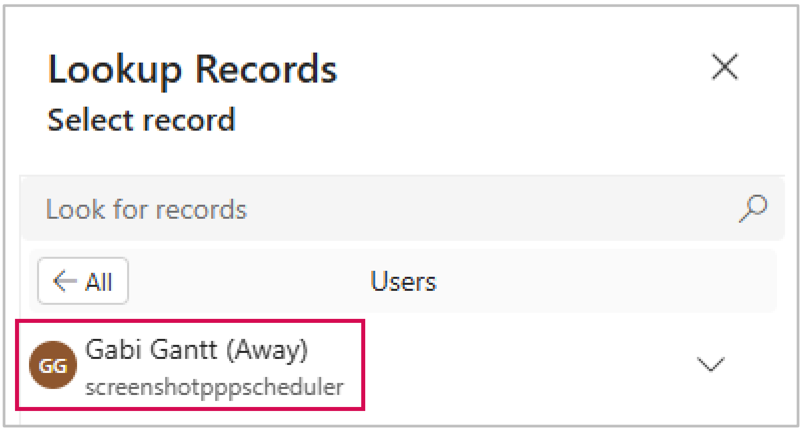
➢ Enter the name of the person you want to add to the team.



Or

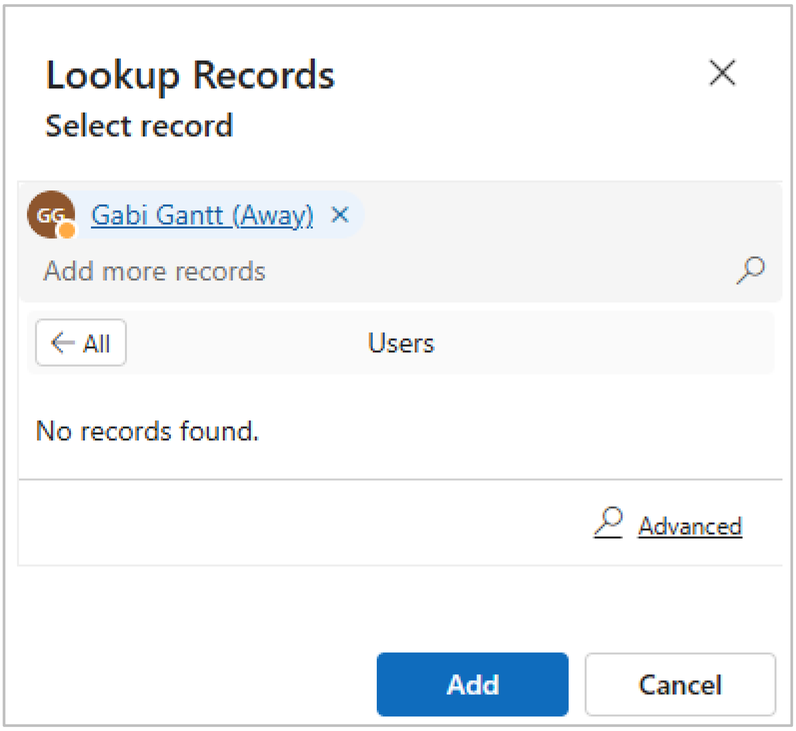
➢ Press Enter to search for a person.

➢ Select the person you want from the suggestions.



➢ Enter additional team members. (optional)

➢ Click *Add*.



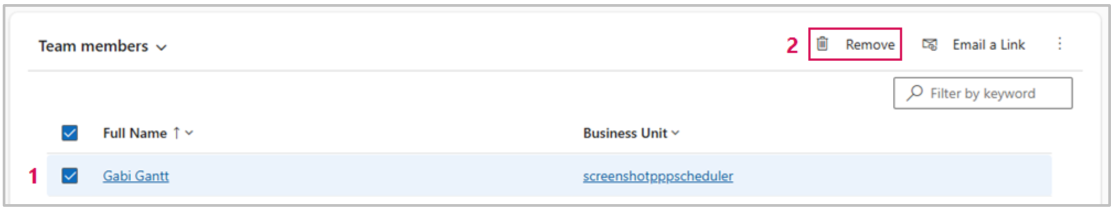
▶ The person(s) will be added to the team.

You can remove team members from the existing team:

➢ Select the person you want to remove from the team.

➢ Click the person's checkbox to select them. (1)

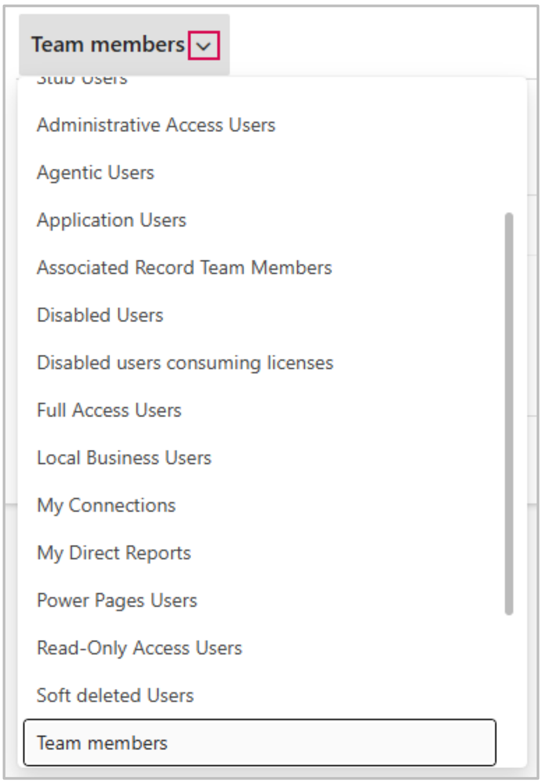
➢ Click *Remove*. (2)



Additional display options:

In the Team Members field, you can use the drop-down menu to switch to other views:

➢ Click the down arrow and select the view you want:



3.2.2 Currencies

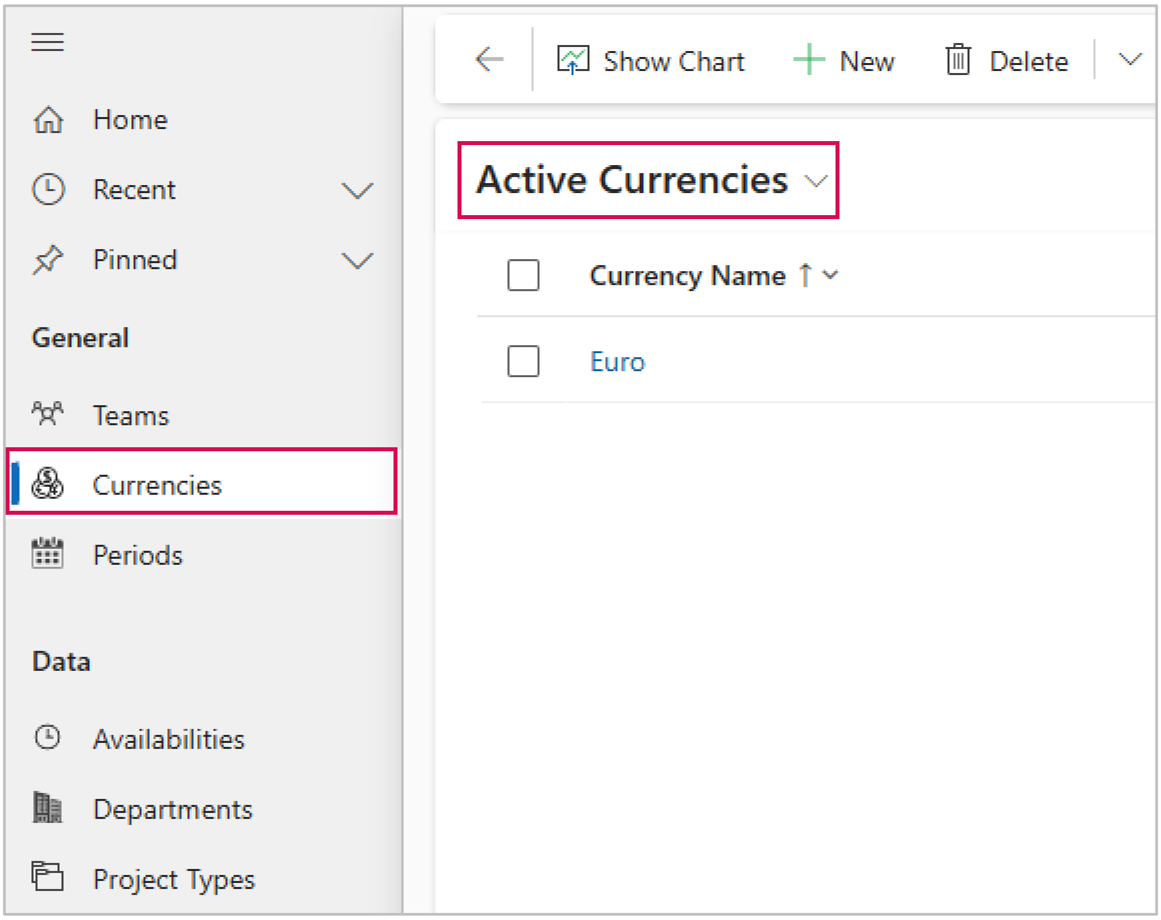
In the *Currencies* section, you can manage your currencies. Here, you can create new currencies and edit existing entries.

▶ Currently, currencies can be created and managed in the system. This feature is currently intended for preparatory purposes. Active processing or display of multiple currencies is not yet available in the standard system. Accordingly, the system does not currently support multi-currency functionality.

In the following sections, we will guide you through all available features and show you step by step how to create, customize, and manage currencies.

➢ Click *Currencies* in the navigation bar to go to the *Currencies* section.

▶ The *Currencies* section opens by default in the *Active Currencies* view.

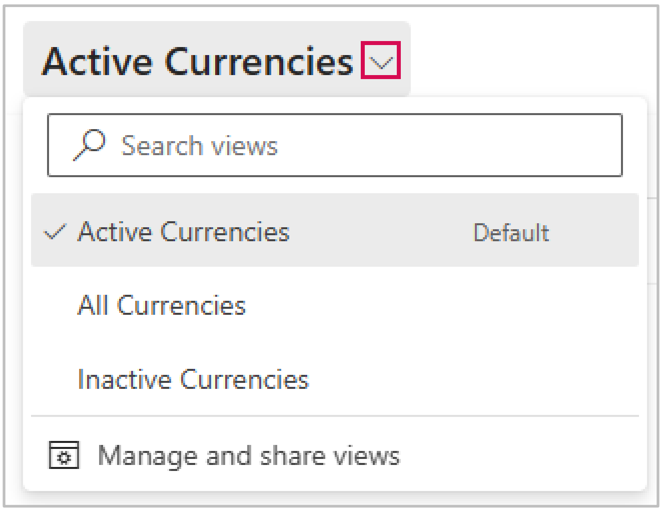


In this view, all active currencies are displayed in a table.

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

➢ Click the down arrow and select a view:

- *All Currencies:* A table listing all currencies.
- *Inactive Currencies:* A table listing all inactive currencies.

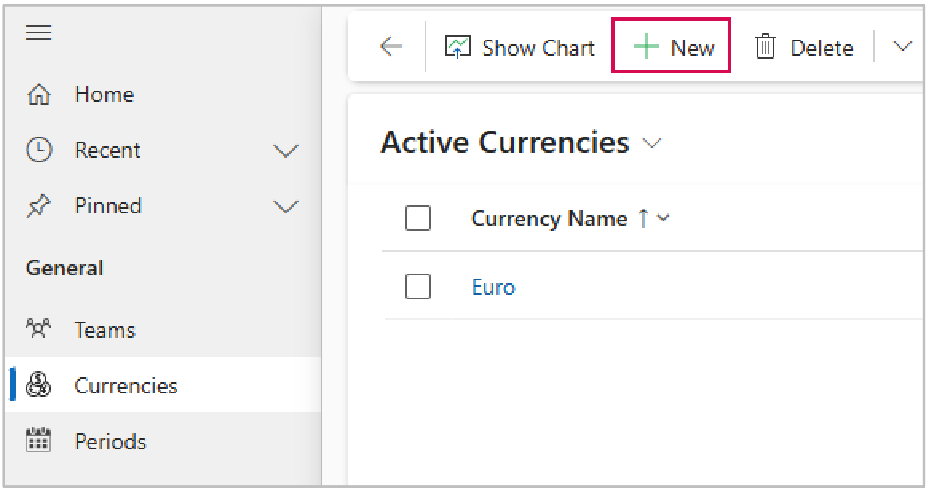


The following section describes how to create, edit, and manage currencies.

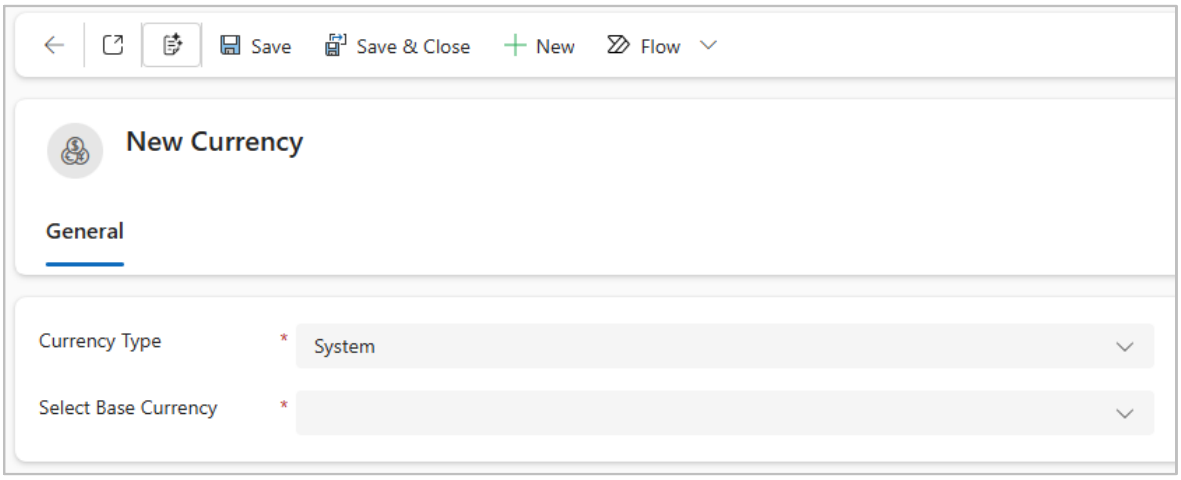
▶ The procedure is described in the *Active Currencies* default view. The procedure is the same in the other views.

Create Currencies:

- ➢ Click *New* in the command bar. ▶ The *New Currency* form opens.

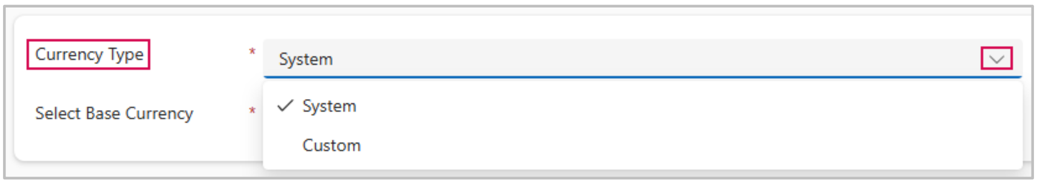


- ➢ Fill out the form:



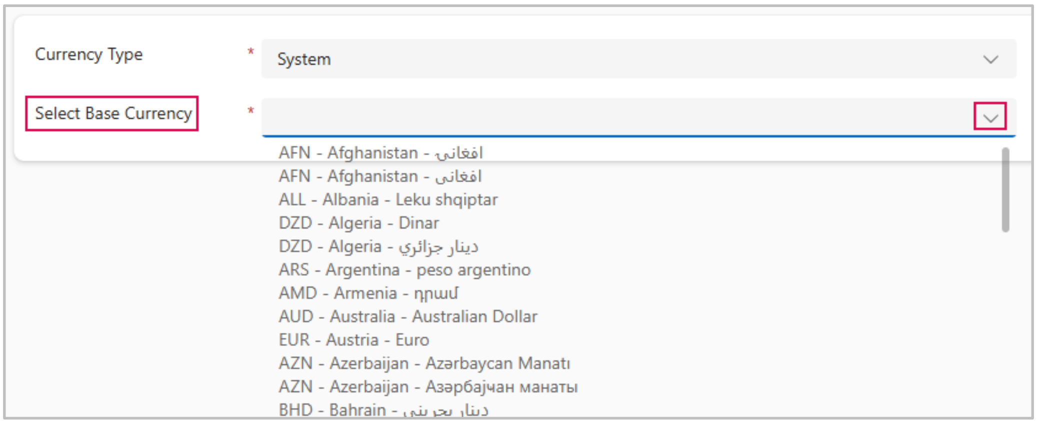
▶ All required fields are marked with a red asterisk.

- ➢ *Currency Type*:
  - ➢ Click the arrow to select the type from the drop-down menu.



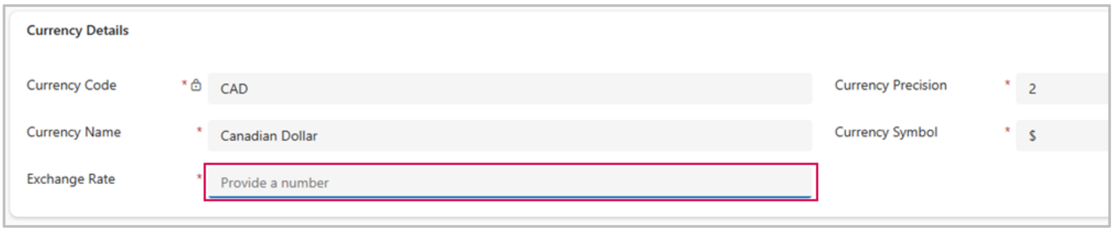
➢ *Select Base Currency*:

➢ Click the arrow to select the base currency from the drop-down menu.



▶ The *Currency Details* field opens.

➢ Enter the exchange rate.



▶ The fields *Currency Code*, *Currency Name*, *Currency Precision*, and *Currency Symbol* are automatically filled in by the system. You can edit these fields.

▶ Fields that cannot be edited are marked as locked with a lock icon.

➢ Click *Save* or *Save & Close* on the command bar.

▶ A new Currency has been created.

Edit Currencies:

Editing an existing currency follows the same process as creating one: All fields that have already been created can be modified as described above.

▶ Fields that cannot be edited are marked as locked with a lock icon.

➢ Select the currency you want to edit, e.g., *Euro*.

➢ In the *Active Currencies* view, click on *Euro*. ▶ The *Euro* form opens.

➢ Enter the desired changes.

➢ Click *Save* or *Save & Close* on the command bar.

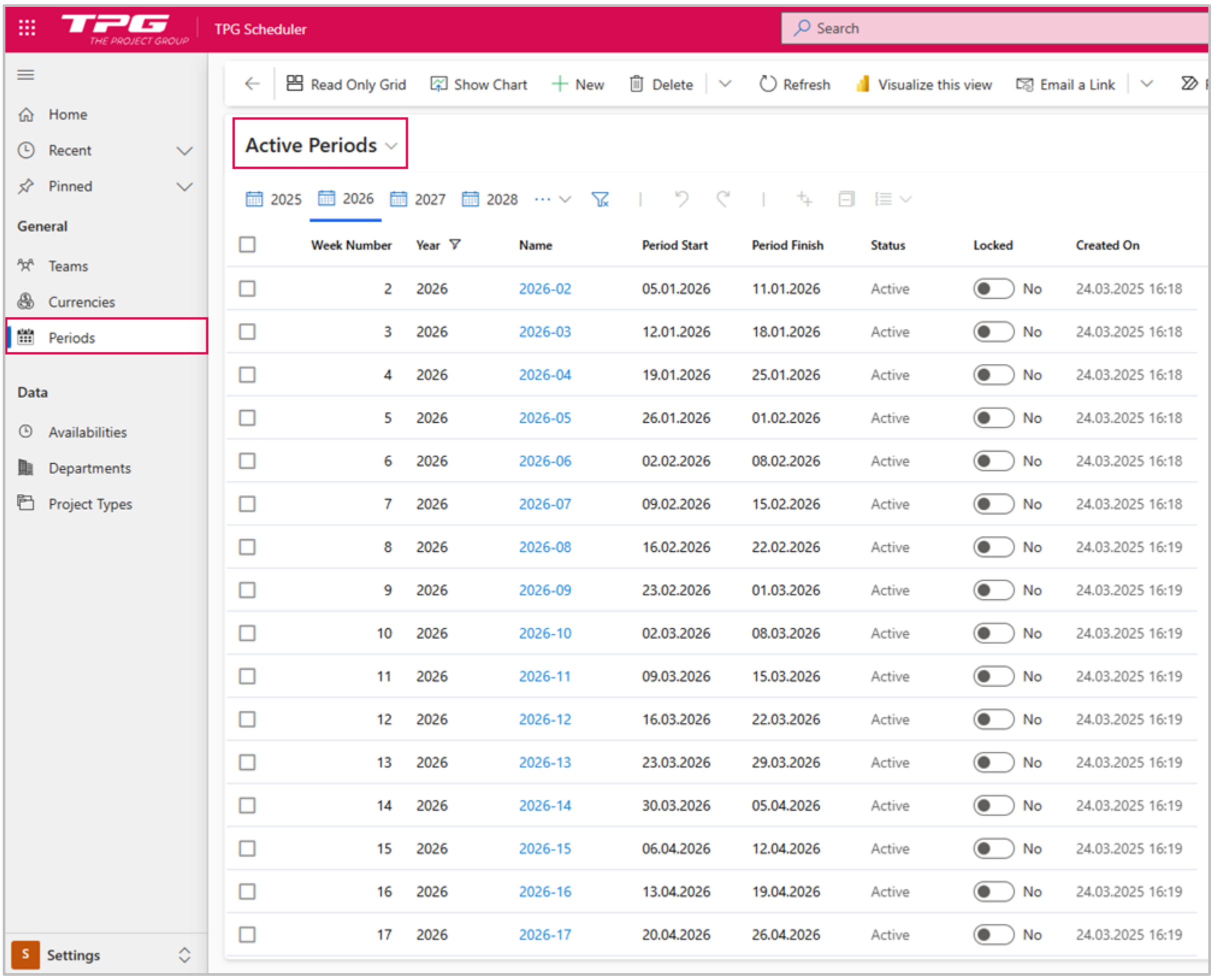
3.2.3 Periods

In the *Periods* section, you can create and manage periods based on calendar weeks. These periods serve as the basis for time tracking in the timesheets and determine the time periods for which employees can record their working hours.

In the following sections, we will guide you through all available features and show you step by step how to create, customize, and manage periods.

➢ Click *Periods* in the navigation bar to go to the *Periods* section.

▶ The *Periods* section opens by default in the *Active Periods* view.

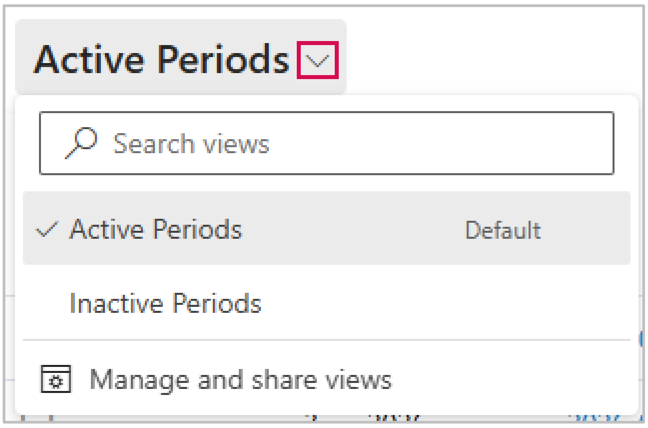


This view displays a table listing all active periods within a calendar year.

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

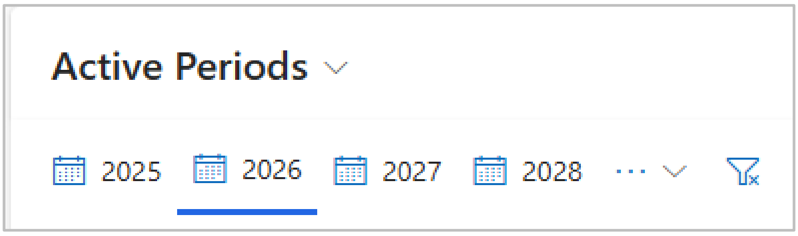
➢ Click the down arrow and select a view:

- *Active Periods*: A table listing all active periods.
- *Inactive Periods*: A table listing all inactive periods.



Navigating between calendar years:

The year selector is located above the table listing the time periods. By default, four years are displayed for direct selection. The currently selected year is underlined in blue:

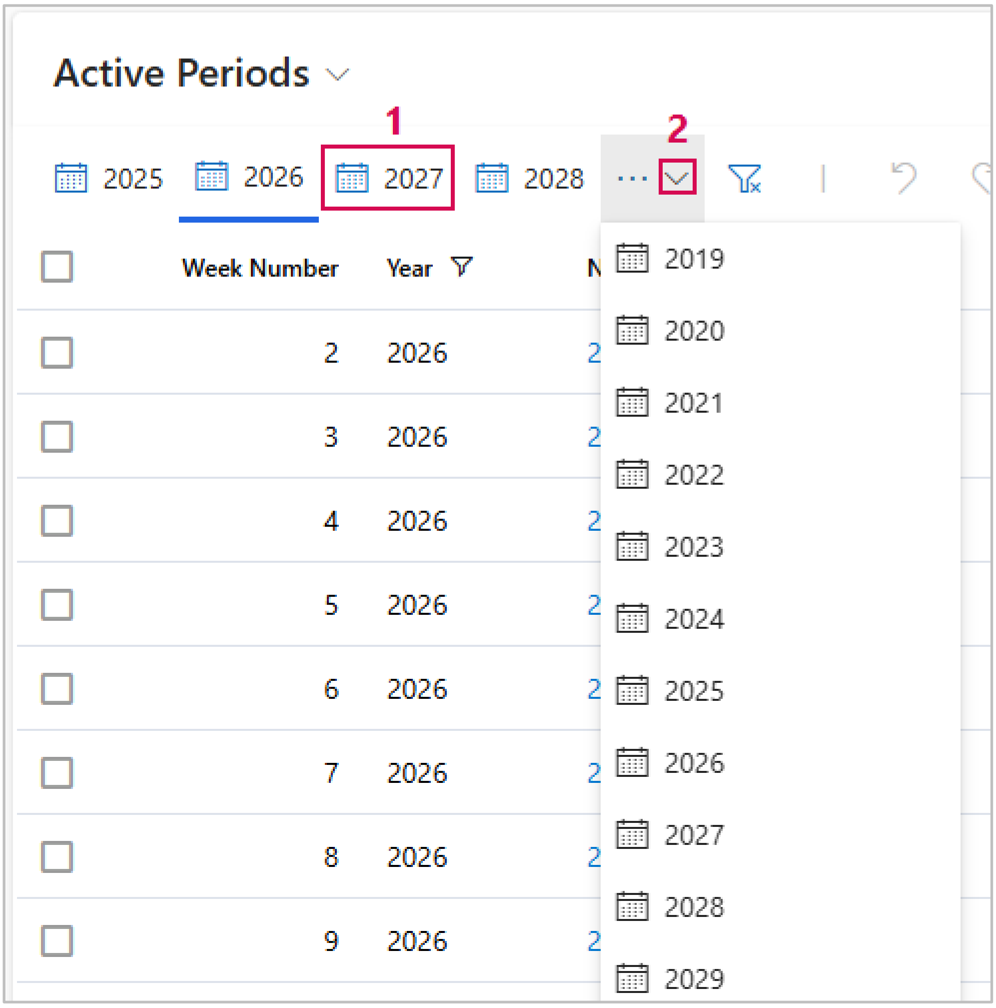


➢ Click on the desired year in the year bar to jump directly to that year. (1)

Or

➢ Click the down arrow. ▶ A drop-down menu with additional years will open. (2)

➢ Click on the desired year to view the time periods within that year.

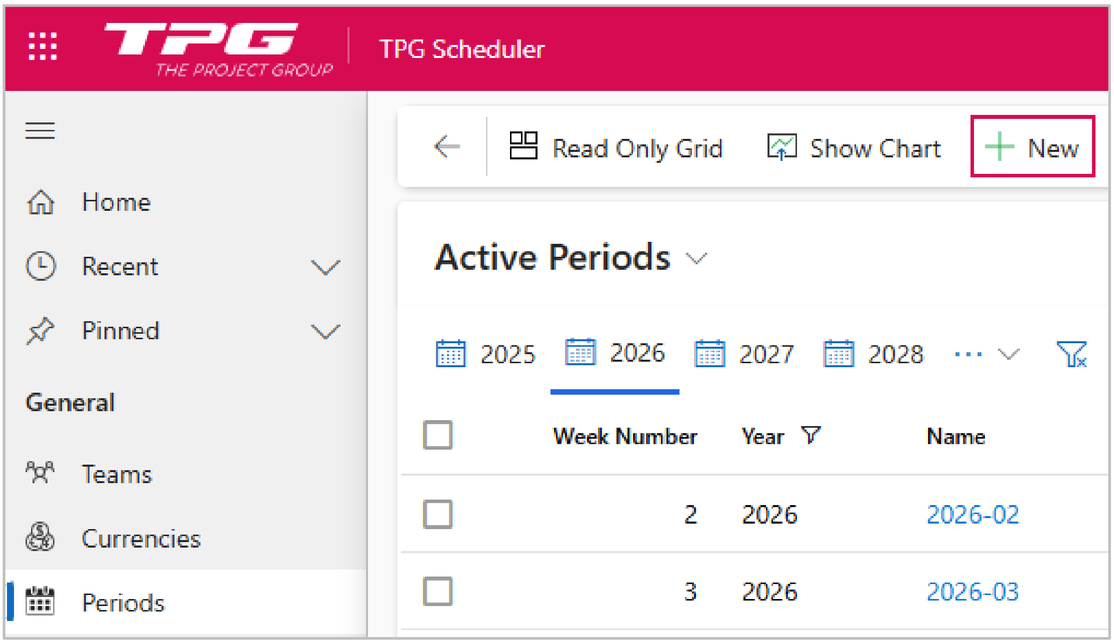


The following section describes how to create, edit, and manage periods.

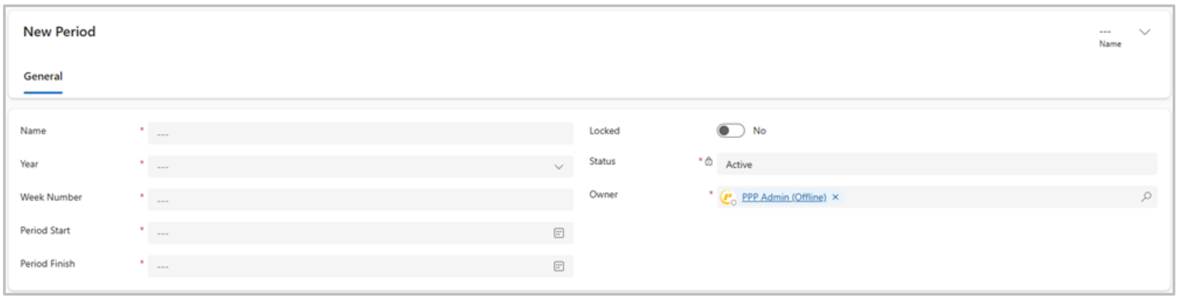
▶ The procedure is described in the *Active Periods* default view. The procedure is the same in the other views.

Create Periods:

➤ Click *New* in the command bar. ▶ The *New Period* form opens.



➤ Fill out the form:



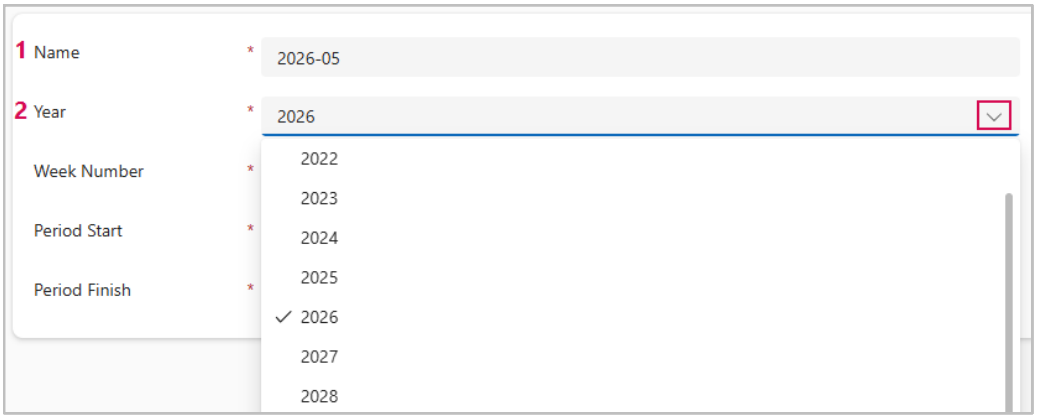
▶ All required fields are marked with a red asterisk.

➤ *Name*: (1)

➤ Enter the name of the time period. It should be as descriptive as possible, e.g., *2026-05* (Calendar Week 5 of 2026)

➤ Year: (2)

➢ Click the arrow to select the year in which the time period falls from the drop-down menu.



➢ *Week Number*: (3)

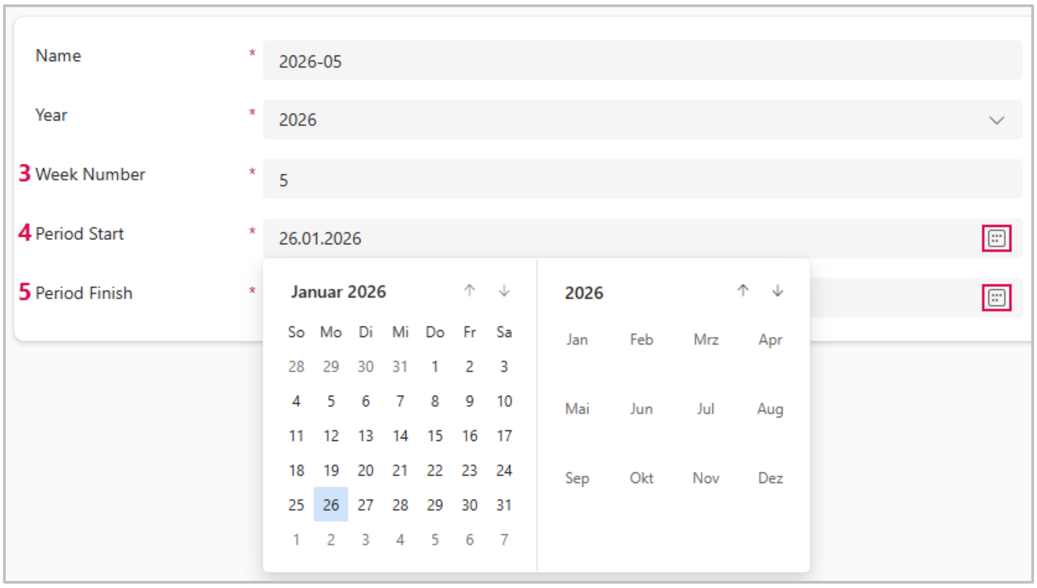
➢ Enter the number of the calendar week in which the period falls

➢ *Period Start*: (4)

➢ Click the calendar icon and select the desired start date for the time period.

➢ *Period Finish*: (5)

➢ Click the calendar icon and select the end date for the time period.



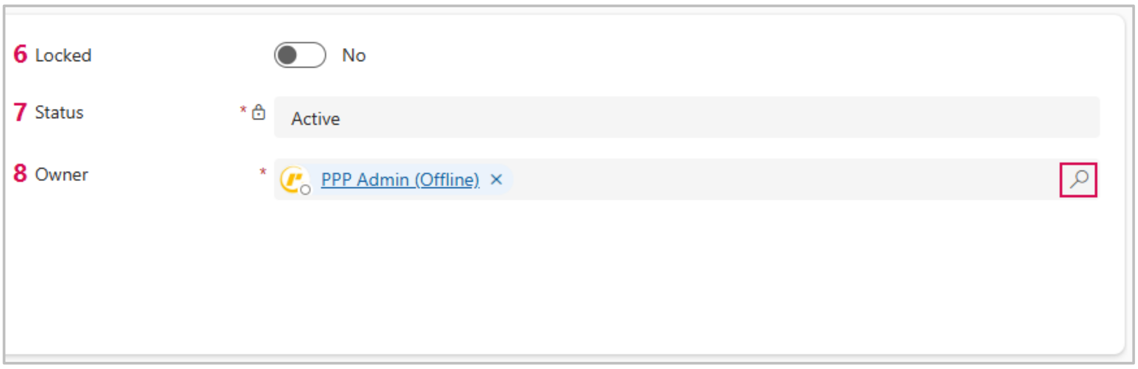
➢ *Locked* (6): By default, the time period is not restricted. The slider is set to *No*.

➢ Click the slider to lock the time period. ▶ The slider is set to *Yes*.

➢ *Status* (7): Set to *Active* automatically by the system.

➢ *Owner* (8): By default, the system automatically assigns the person who created the time period as the owner. You can change the owner.

➢ Click the search icon to select a different owner from the drop-down menu.



▶ The *Status* and *Owner* fields are automatically filled in by the system. You can edit the *Owner* field.

▶ Fields that cannot be edited are marked as locked with a lock icon.

➢ Click *Save* or *Save & Close* on the command bar.

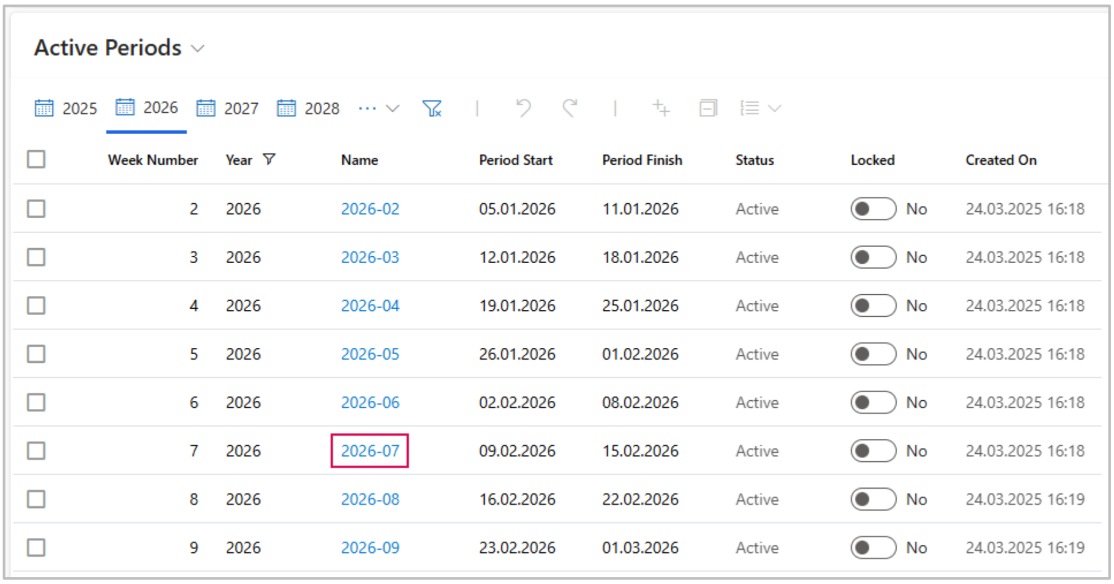
▶ A new Period has been created.

Edit Periods:

Editing an existing period follows the same process as creating one: All fields that have already been created can be modified as described above.

▶ Fields that cannot be edited are marked as locked with a lock icon.

➢ Select the time period you want to edit, e.g., *2026-07*.



	Week Number	Year	Name	Period Start	Period Finish	Status	Locked	Created On
	2	2026	2026-02	05.01.2026	11.01.2026	Active	No	24.03.2025 16:18
	3	2026	2026-03	12.01.2026	18.01.2026	Active	No	24.03.2025 16:18
	4	2026	2026-04	19.01.2026	25.01.2026	Active	No	24.03.2025 16:18
	5	2026	2026-05	26.01.2026	01.02.2026	Active	No	24.03.2025 16:18
	6	2026	2026-06	02.02.2026	08.02.2026	Active	No	24.03.2025 16:18
	7	2026	2026-07	09.02.2026	15.02.2026	Active	No	24.03.2025 16:18
	8	2026	2026-08	16.02.2026	22.02.2026	Active	No	24.03.2025 16:19
	9	2026	2026-09	23.02.2026	01.03.2026	Active	No	24.03.2025 16:19

➢ In the *Active Time Periods* view, click *2026-07*. ▶ The *2026-07* form opens.

➢ Enter the desired changes.

➢ Click *Save* or *Save & Close* on the command bar.

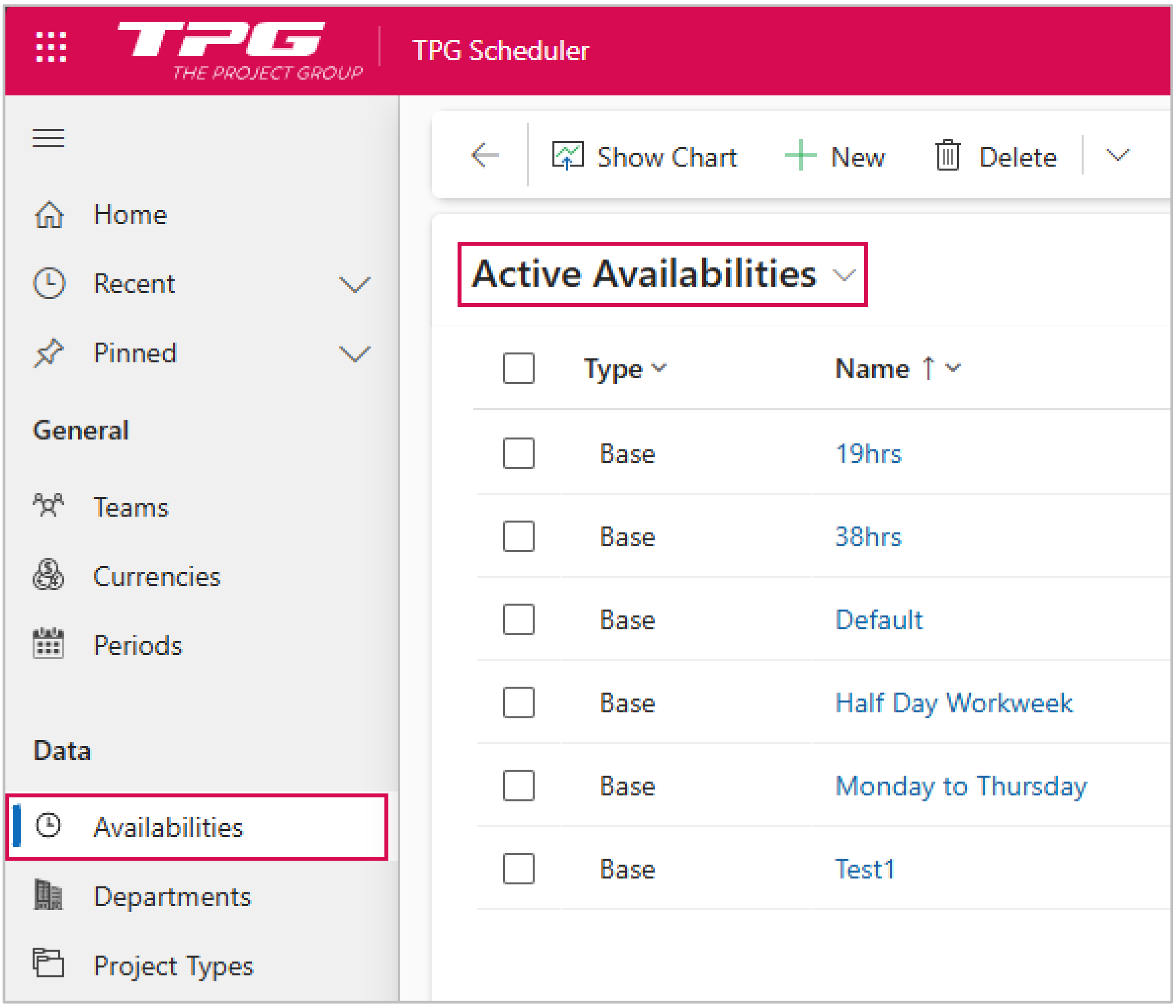
3.2.4 Availabilities

In the *Availability* section, you can set up different calendars to reflect employees' work schedules. Here, you can define and manage both full-time and part-time schedules. The calendars you create will then serve as the basis for planning work and project hours.

In the following sections, we will guide you through all available features and show you step by step how to create, customize, and manage availabilities.

➢ Click on *Availability* in the navigation bar to go to the *Availability* section.

▶ By default, the *Availability* section opens in the *Active Availability* view.

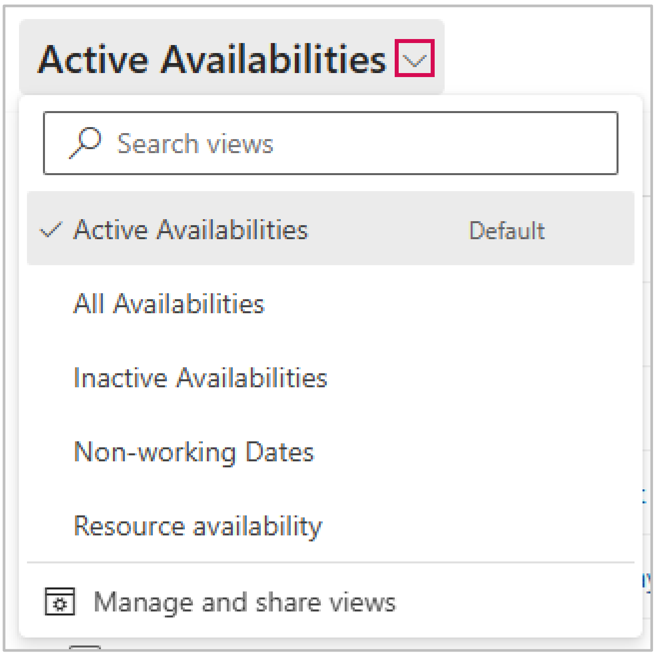


This view displays a table listing all active availabilities within a calendar year.

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

➢ Click the down arrow and select a view:

- *All Availabilities:* A table listing all calendars.
- *Inactive Availabilities:* Tabular list of all inactive calendars.
- *Non-working Dates:* Tabular list of all non-working days, e.g., holidays.
- *Resource availability:* Tabular list of all resources to which a calendar is assigned.

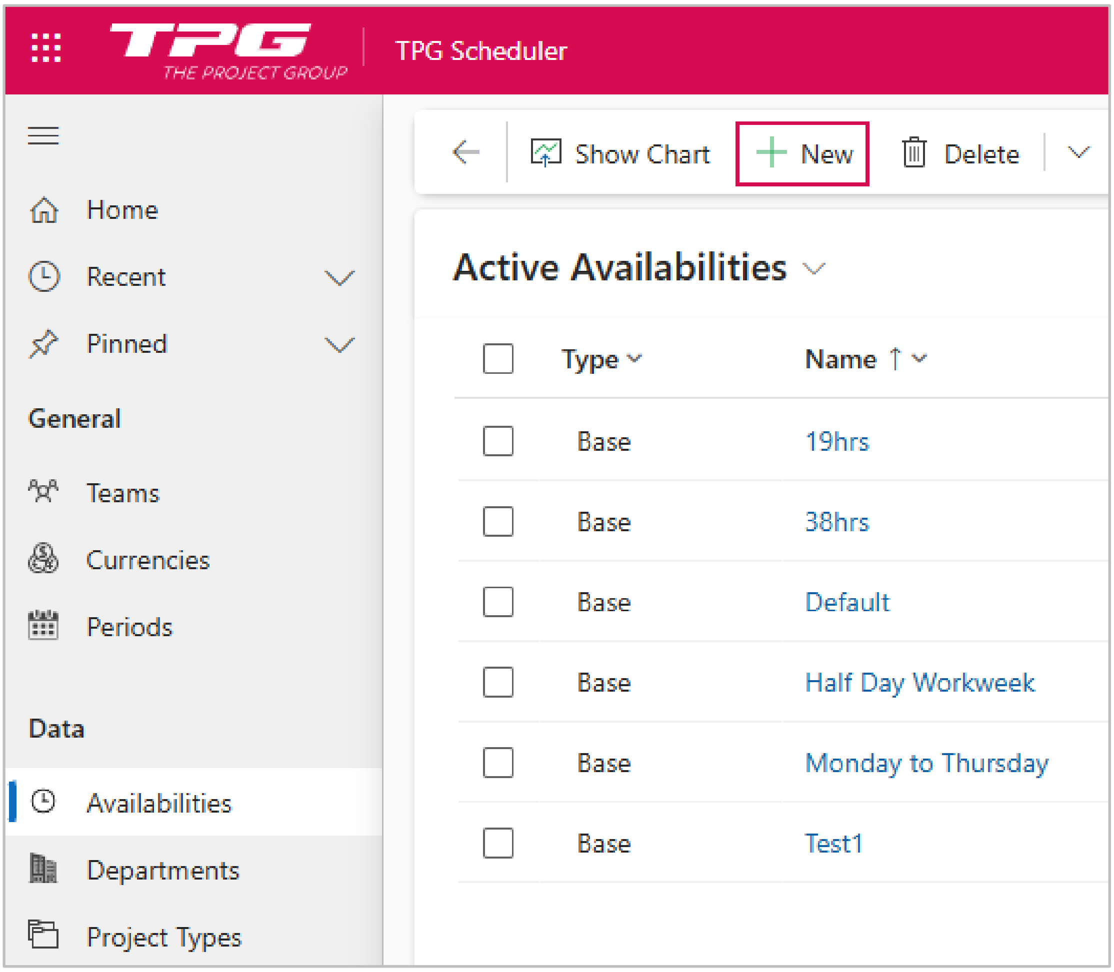


The following section describes how to create, edit, and manage availabilities.

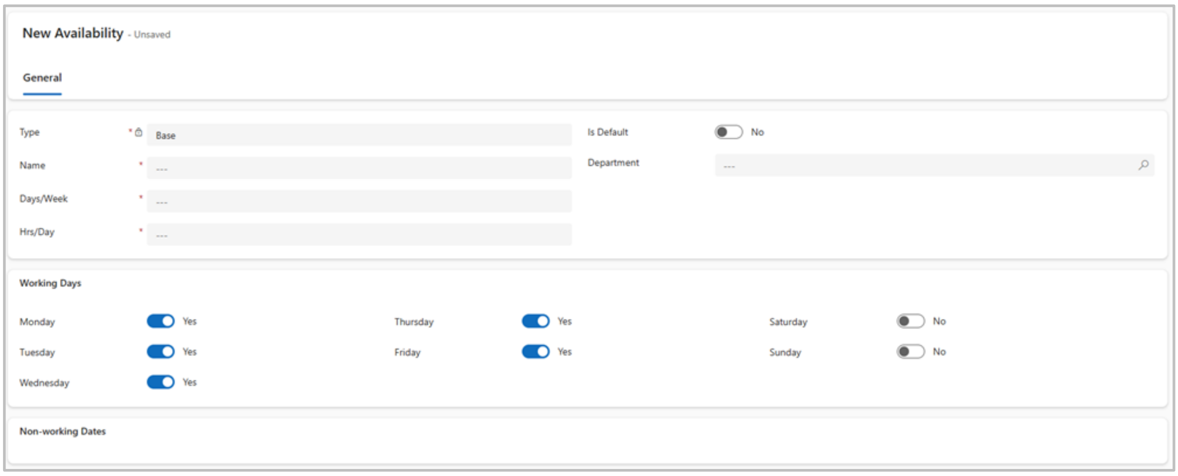
▶ The procedure is described in the *Active Availabilities* default view. The procedure is the same in the other views.

Create Availabilities:

➢ Click *New* in the command bar. ▶ The *New Availability* form opens.

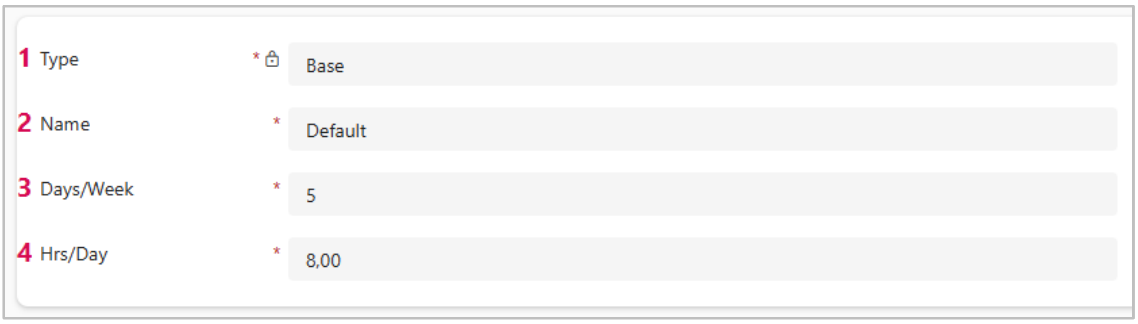


➢ Fill out the form:

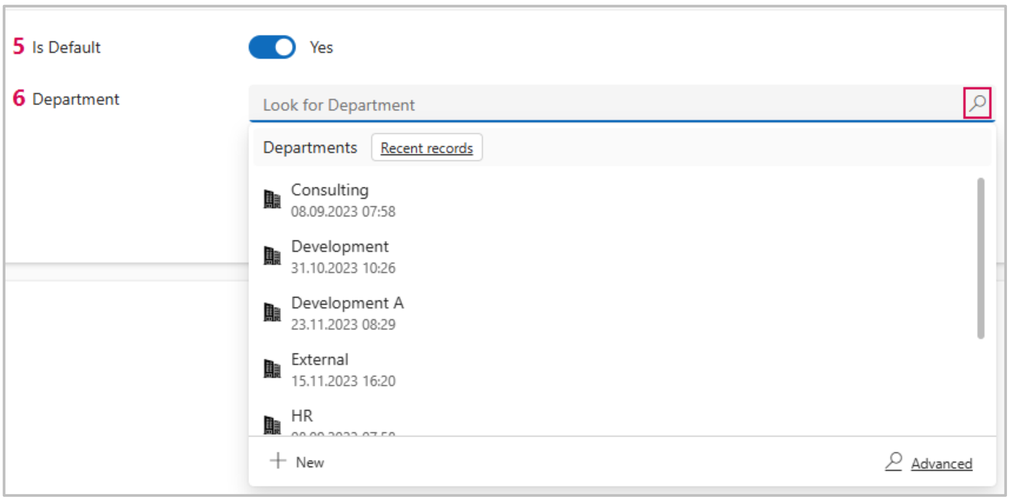


▶ All required fields are marked with a red asterisk.

- *Type:* (1) Set automatically by the system to *Base*.
- *Name*: (2)
  - Enter the name of the availability. It should be as descriptive as possible, e.g., *Default*.
- *Days/Week:* (3)
  - Enter the number of workdays per week.
- *Hrs/Day*: (4)
  - Enter the number of working hours per day.

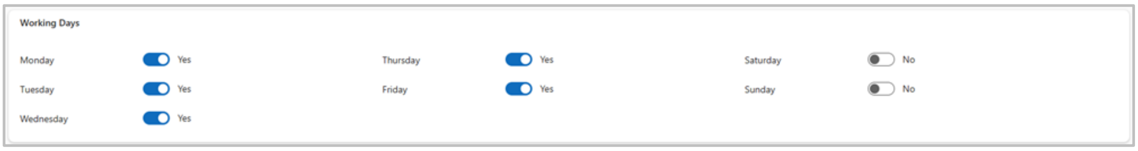


- *Is Default*: (5) By default, the current availability is not set as the default. The slider is set to *No*.
  - Click the slider to set the availability as the default. ▶ The slider is set to *Yes*.
- *Department*: (6) The department to which the availability is assigned.
  - Click the search icon to select a different department from the drop-down menu.



➢ *Working Days*: By default, *Monday, Tuesday, Wednesday, Thursday* and *Friday* are marked as workdays (with the slider set to *Yes*), and *Saturday* and *Sunday* are marked as non-workdays (with the slider set to *No*).

➢ Click the slider to designate the desired day as a workday or a non-workday.



➢ *Non-working Dates* (8): You can assign non-working days to the calendar.

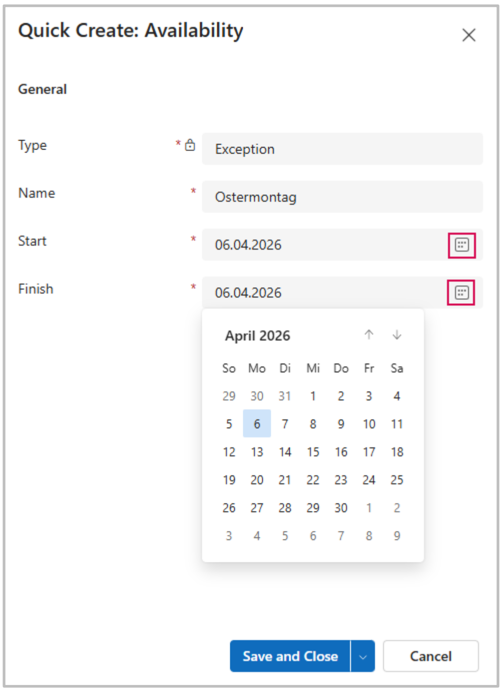
➢ Click *New*. ▶ The *Quick Entry: Availability* form opens.

➢ *Type*: Is automatically defined as an exception by the system.

➢ *Name*: Enter the name. It should be as descriptive as possible, e.g., Ostermontag.

➢ *Start and* Finish: Click the calendar icon to enter the start and end dates.

➢ Click *Save and Close*.



- The *Type* field is filled in automatically by the system.
- Fields that cannot be edited are marked as locked with a lock icon.

➢ Click *Save* or *Save & Close* on the command bar.

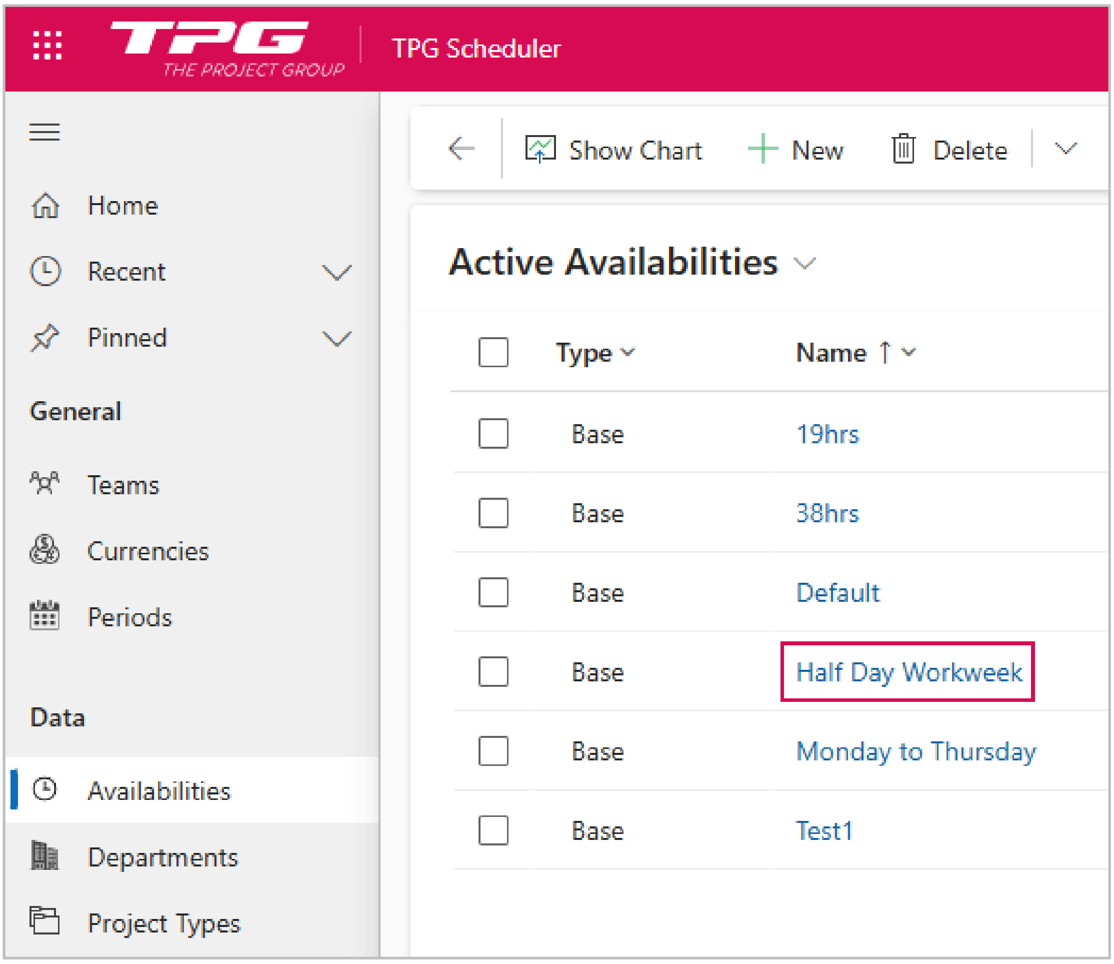
- A new Avalability has been created.

Edit Availabilities:

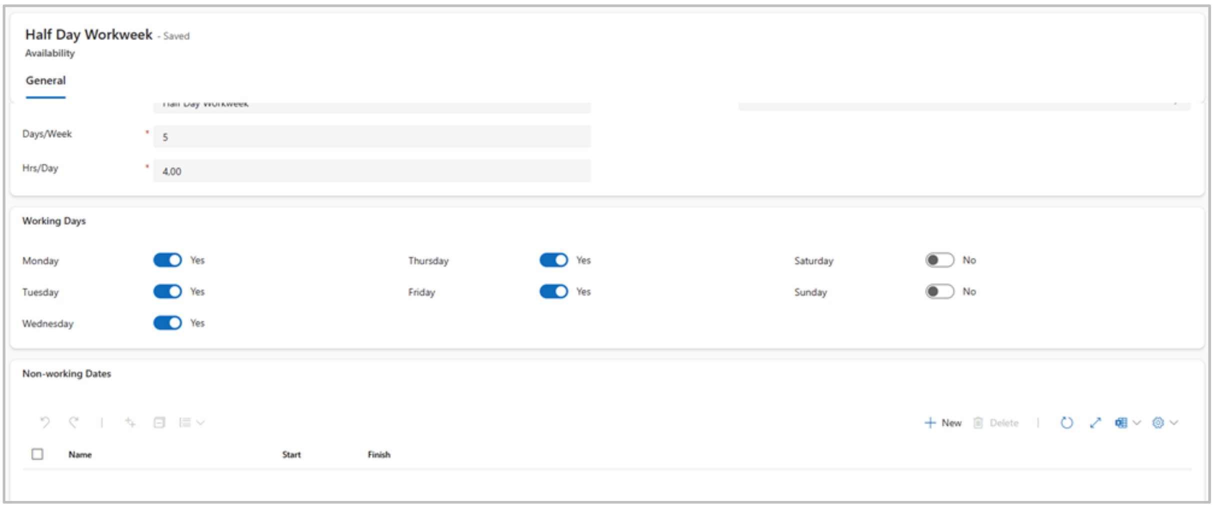
Editing an existing availability follows the same process as creating one: All fields that have already been created can be modified as described above.

- Fields that cannot be edited are marked as locked with a lock icon.

➢ Select the availability you want to edit, such as *Half Day Workweek*.



➢ In the *Active Availabilities* view, click *Half Day Workweek*. ▶ The *Half Day Workweek* form opens.



➤ Enter the desired changes.

➤ Click *Save* or *Save & Close* on the command bar.

3.2.5 Departments

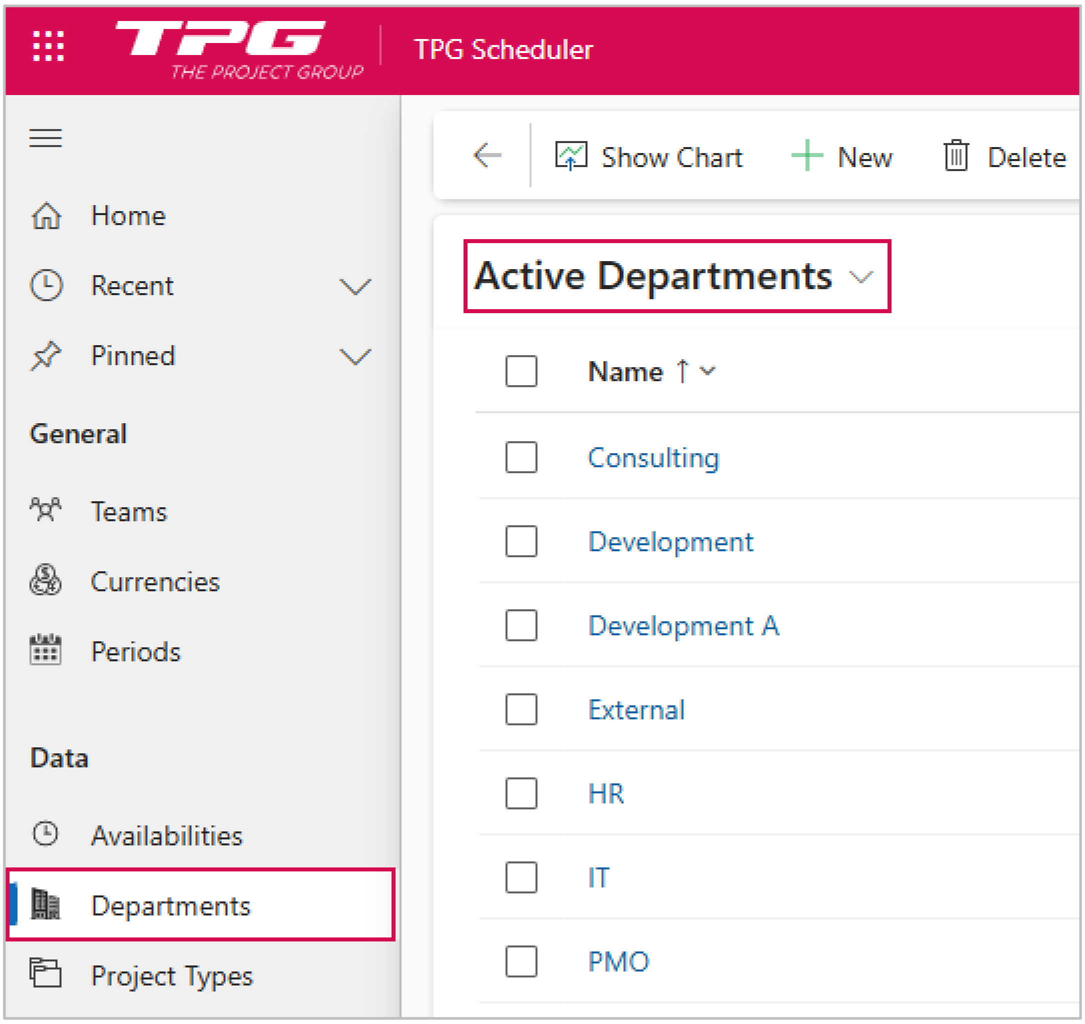
In the *Departments* section, you can create and manage your company's organizational units. Here, you can create new departments, edit existing ones, or mark them as inactive.

▶ Departments are used only for organizational purposes and have no bearing on permissions. They are used, among other things, for heatmaps in resource plans.

In the following sections, we will guide you through all available features and show you step by step how to create, customize, and manage departments.

➤ Click on *Departments* in the navigation bar to go to the *Department* section.

▶ By default, the *Department* section opens in the *Active Departments* view.

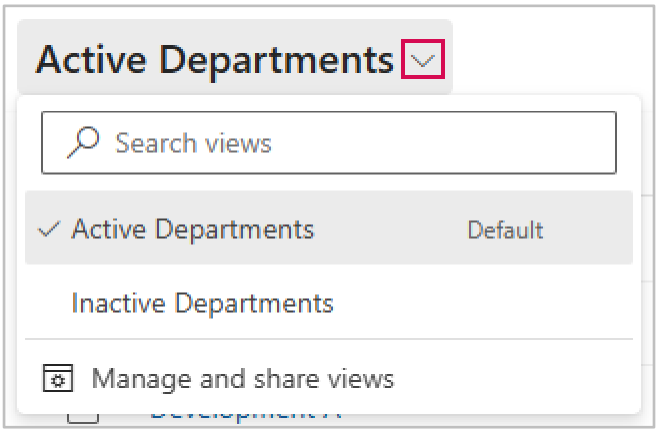


In this view, all active departments are displayed in a table.

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

➢ Click the down arrow and select a view:

- *Active Departments:* A table listing all active departments.
- *Inactive Departments:* A table listing all inactive departments.

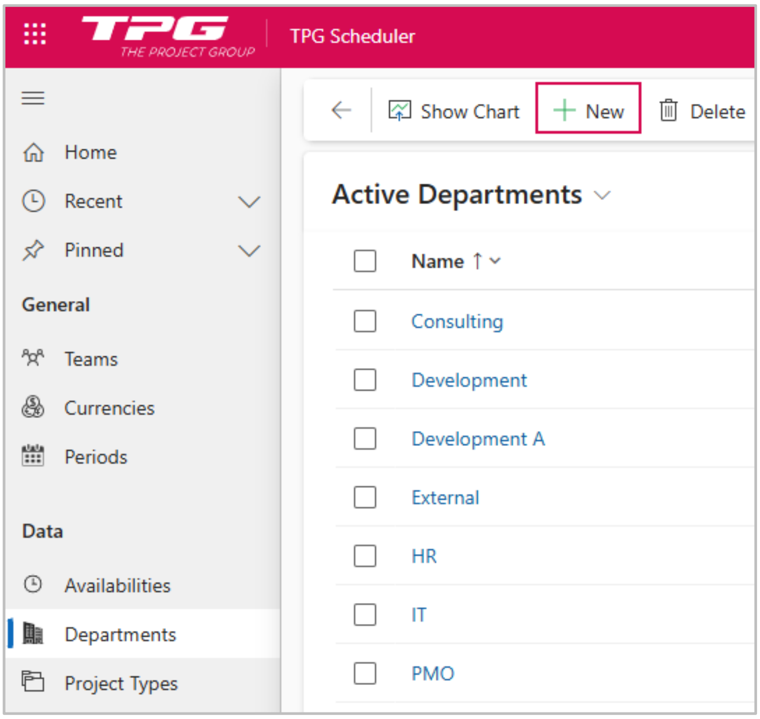


The following section describes how to create, edit, and manage departments.

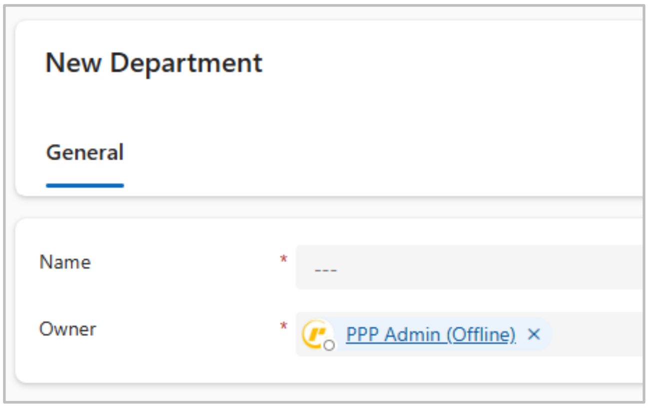
▶ The procedure is described in the *Active Departments* default view. The procedure is the same in the other views.

Create Departments:

➢ Click *New* in the command bar. ▶ The *New Department* form opens.



➢ Fill out the form:



▶ All required fields are marked with a red asterisk.

➢ *Name*: (1)

➢ Enter the name of the department. It should be as descriptive as possible, e.g., *Development*.

➢ *Owner* (2): By default, the system sets the person who created the department as the owner. You can change the owner.

➢ Click the search icon to select a different owner from the drop-down menu.

➢ Click *Save* or *Save & Close* on the command bar.

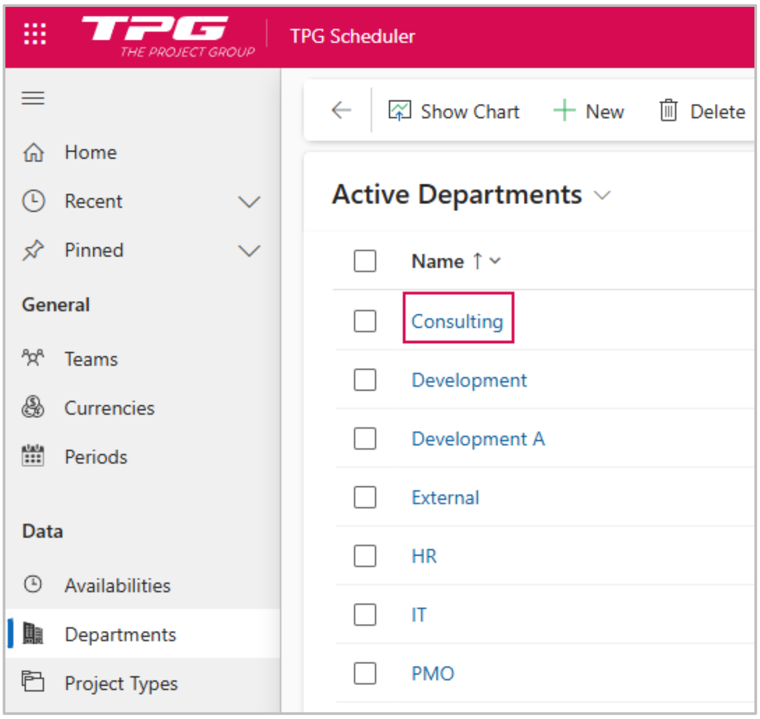
▶ A new Department has been created.

Edit Departments:

Editing an existing department follows the same process as creating one: All fields that have already been created can be modified as described above.

▶ Fields that cannot be edited are marked as locked with a lock icon.

➢ Select the department you want to edit, e.g., *Consulting*.



➢ In the *Active Departments* view, click *Consulting*. ▶ The *Consulting* form opens

➢ Enter the desired changes.

➢ Click *Save* or *Save & Close* on the command bar.

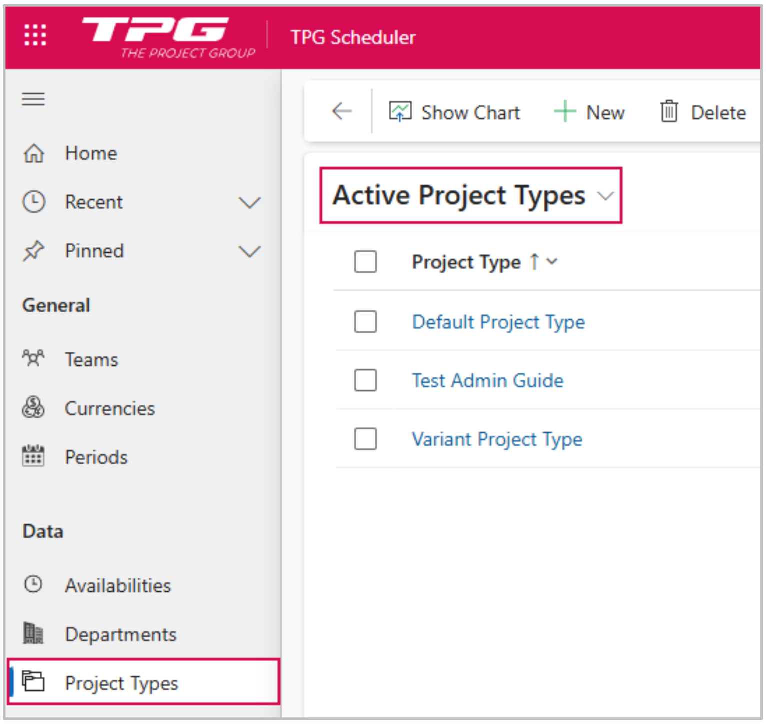
3.2.6 Project Types

In the *Project Types* section, you can create and manage project types that meet your company's specific requirements. Within each project type, you define the structure and the tabs that will appear in the project.

In the following sections, we will guide you through all available features and show you step by step how to create, customize, and manage Project Types.

➢ Click on *Project Types* in the navigation bar to go to the *Project Type* section.

▶ By default, the *Project Type* section opens in the *Active Project Types* view.

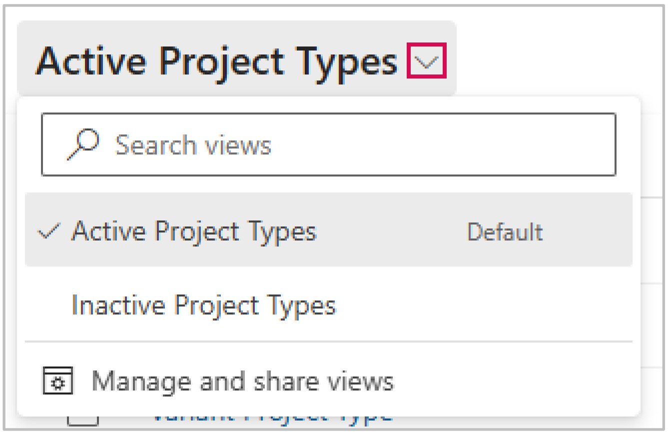


In this view, all active project types are displayed in a table.

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

➢ Click the down arrow and select a view:

- *Active Project Types:* A table listing all active project types.
- *Inactive Project Types:* A table listing all inactive project types.

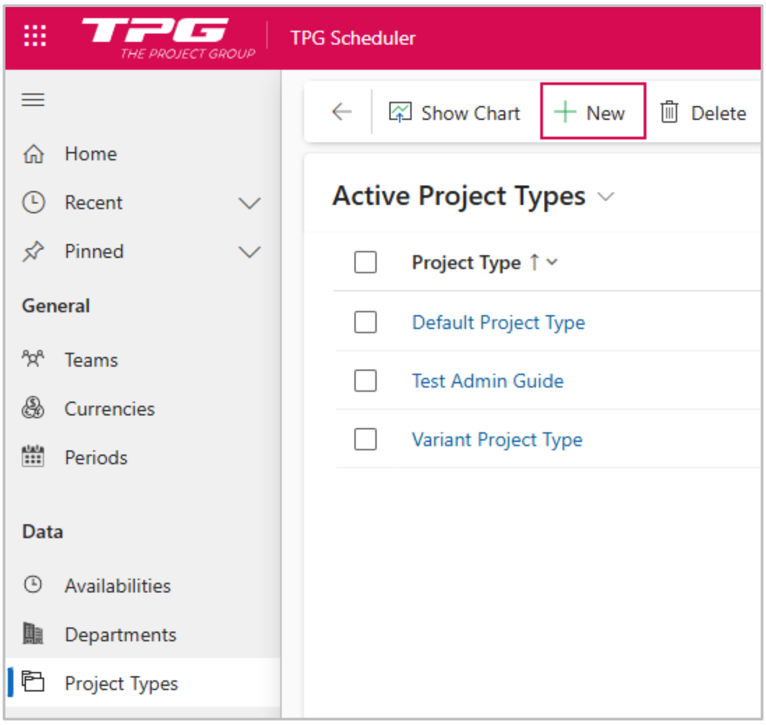


The following section describes how to create, edit, and manage project types.

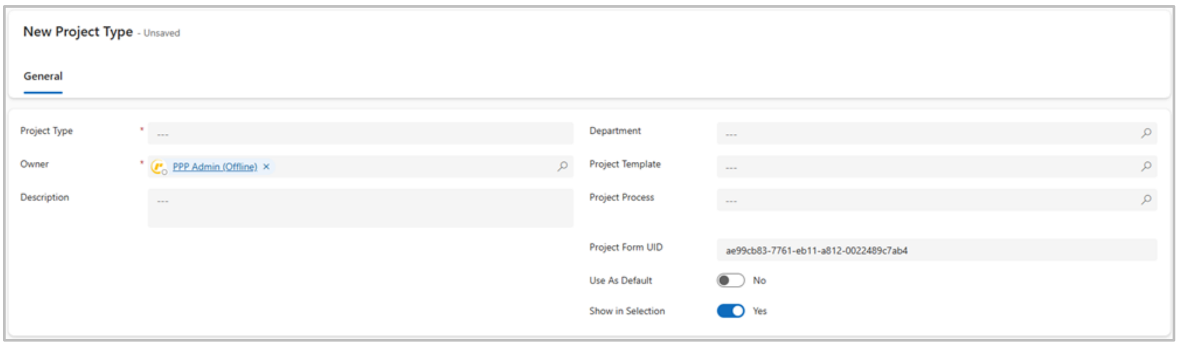
▶ The procedure is described in the *Active Project Types* default view. The procedure is the same in the other views.

Create Project Types:

➢ Click *New* in the command bar. ▶ The *New Project Type* form opens.



➢ Fill out the form:



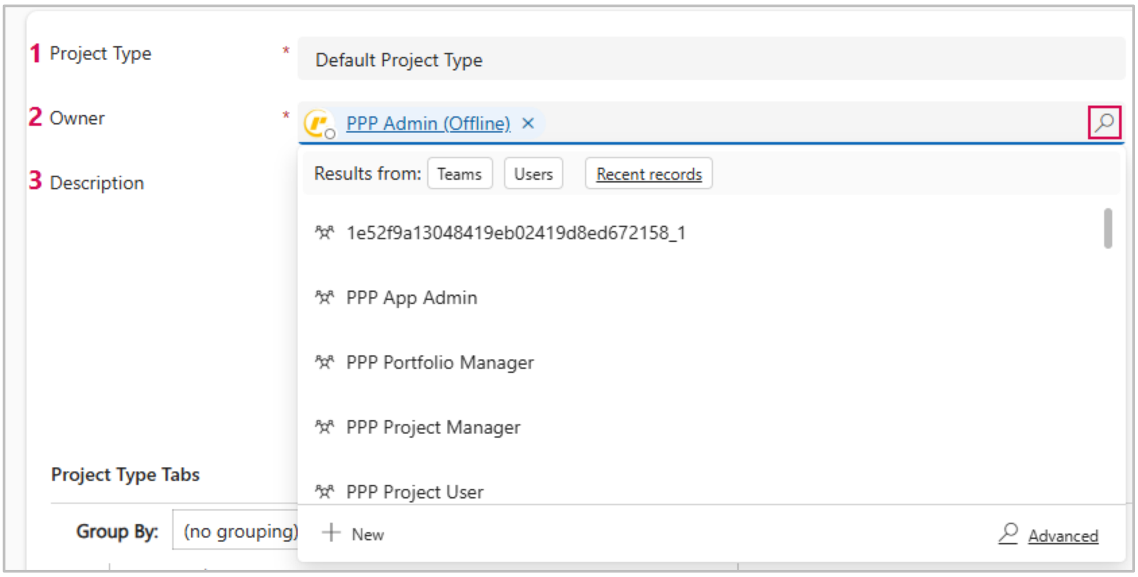
▶ All required fields are marked with a red asterisk.

➢ *Project Type:* (1)

➢ Enter a name for the project type. This should be as descriptive as possible, e.g., *Default Project Type.*

➢ *Owner* (2): By default, the system sets the person who created the project type as the owner. You can change the owner.

➢ Click the search icon to select a different owner from the drop-down menu.



➢ *Description* (3)

➢ Enter a description for the project type. This should be as descriptive as possible.

➢ *Department*: (4)

➢ Enter the department to which the project type should be assigned.

Or

➢ Click the search icon to select a department from the drop-down menu.

➢ *Project Template*: (5)

➢ Enter a project template to be assigned to the project type.

Or

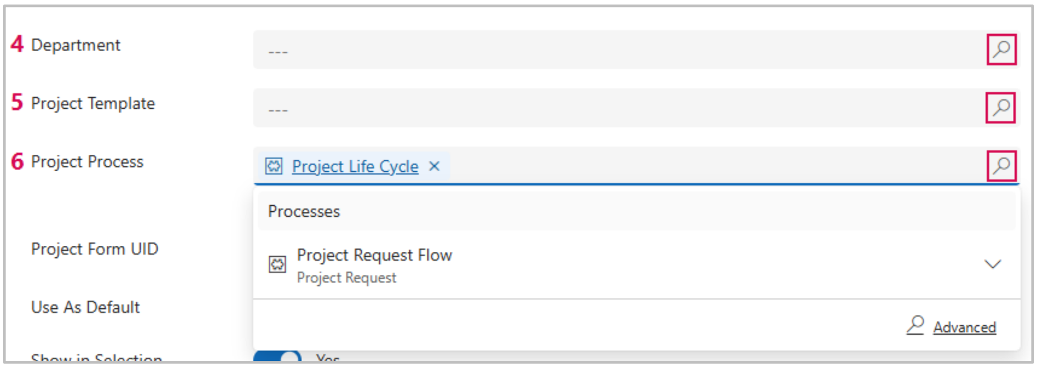
➢ Click the search icon to select a project template from the drop-down menu.

- *Project Process*: (6)

➢ Enter a project process to be assigned to the project type.

Or

➢ Click the search icon to select a project process from the drop-down menu.



➢ *Project Form UID* (7): An alphanumeric string used to uniquely identify the project type in the system. The UID (Unique Identifier) is automatically assigned by the system. You can edit it.

▶ Requirement: The required project form must be prepared in advance by TPG.

➢ Click in the field and enter the desired change.

➢ *Use as Default* (8): By default, the project type is not set as the default. The slider is set to *No*.

➢ Click the slider to set the project type as the default. ▶ The slider is set to *Yes*.

➢ *Show in Selection* (9): By default, the project type is displayed in the selection. The slider is set to Yes.

➢ Click the slider to hide the project type from the selection. ▶ The slider is set to *No*.

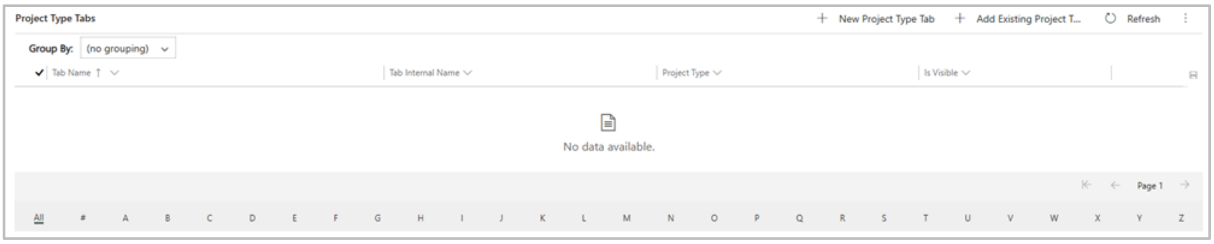
➢ Click *Save* in the command bar.

▶ A new project type has been created. .

Assign tabs to the project:

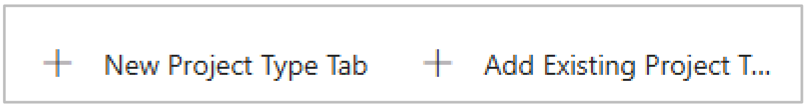
Once the project type has been created, you can assign the tabs that will be displayed in the project to the project type. The tabs are automatically created by the system as part of a workflow. In this step, you specify which of the existing tabs should be displayed in the project.

To do this, the Tabs section of the project type appears:



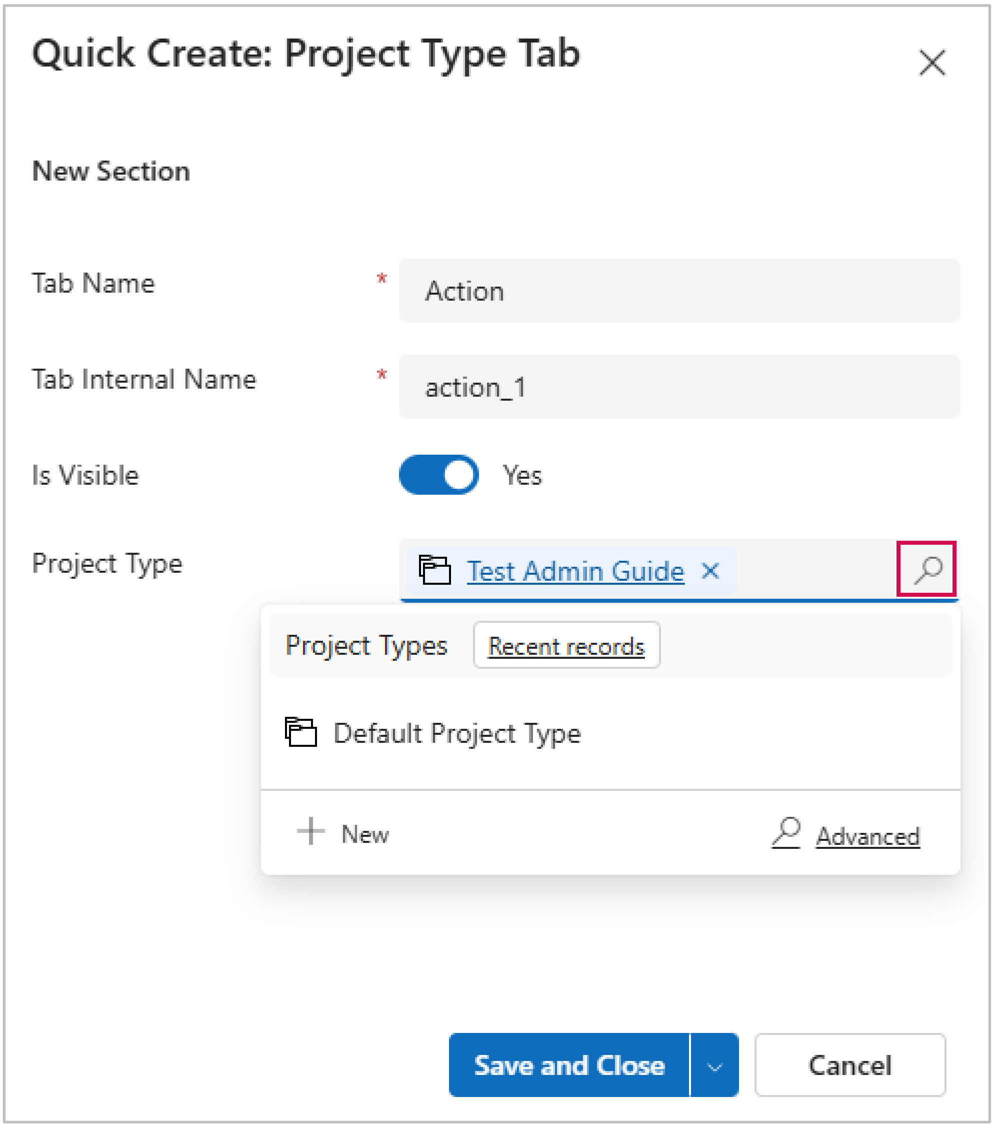
▶ No new tabs are created manually. Instead, you can reference existing project type tabs.

There are two ways to add a tab:



- *New Project Type Tab:* Used to add a linked project type tab.
  - ➢ Click *New Project Type Tab.* ▶ The *Quick Create: Project Type Tab* form opens.
  - ➢ Fill out the form:
    - ➢ *Tab Name:* Enter a name for the tab.
    - ➢ *Tab Internal Name:* Enter the internal name for the tab.
    - ➢ *Is Visible:* Set the slider to Yes to display the tab in the project type.
    - ➢ *Project Type: By* default, the system selects the current project type. You can change the project type by selecting a different one from the drop-down menu.

➢ Click *Save and Close*.



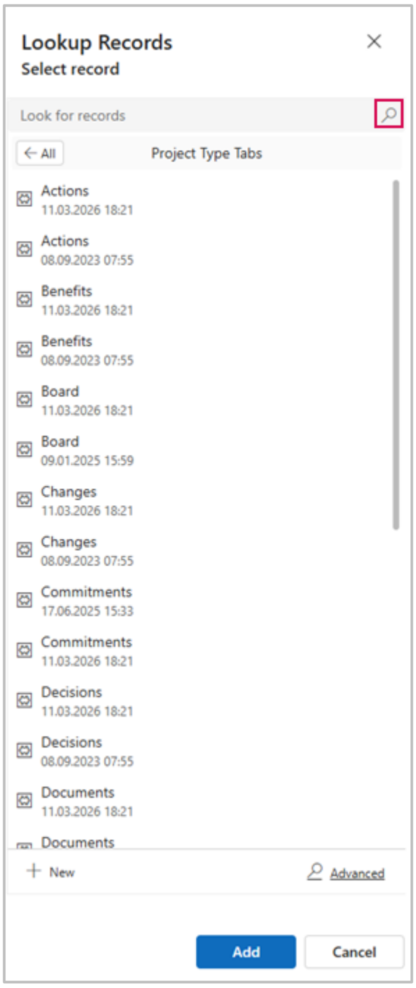
▶ A new tab is created, assigned to the current project type, and appears in the table.

- *Add Existing Project Type Tab*: Used to add a missing project type tab item.

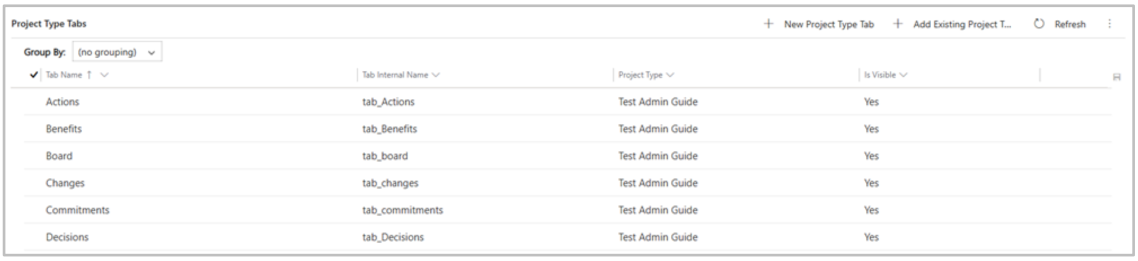
  ➢ Click *Add Existing Project Type Tab*. ▶ The *Lookup Records* form opens.

  ➢ Click the search icon to select an existing record from the drop-down menu.

➢ Click *Add*.



▶ The selected tabs are assigned to the current project type and appear in the table.



Edit Project Types:

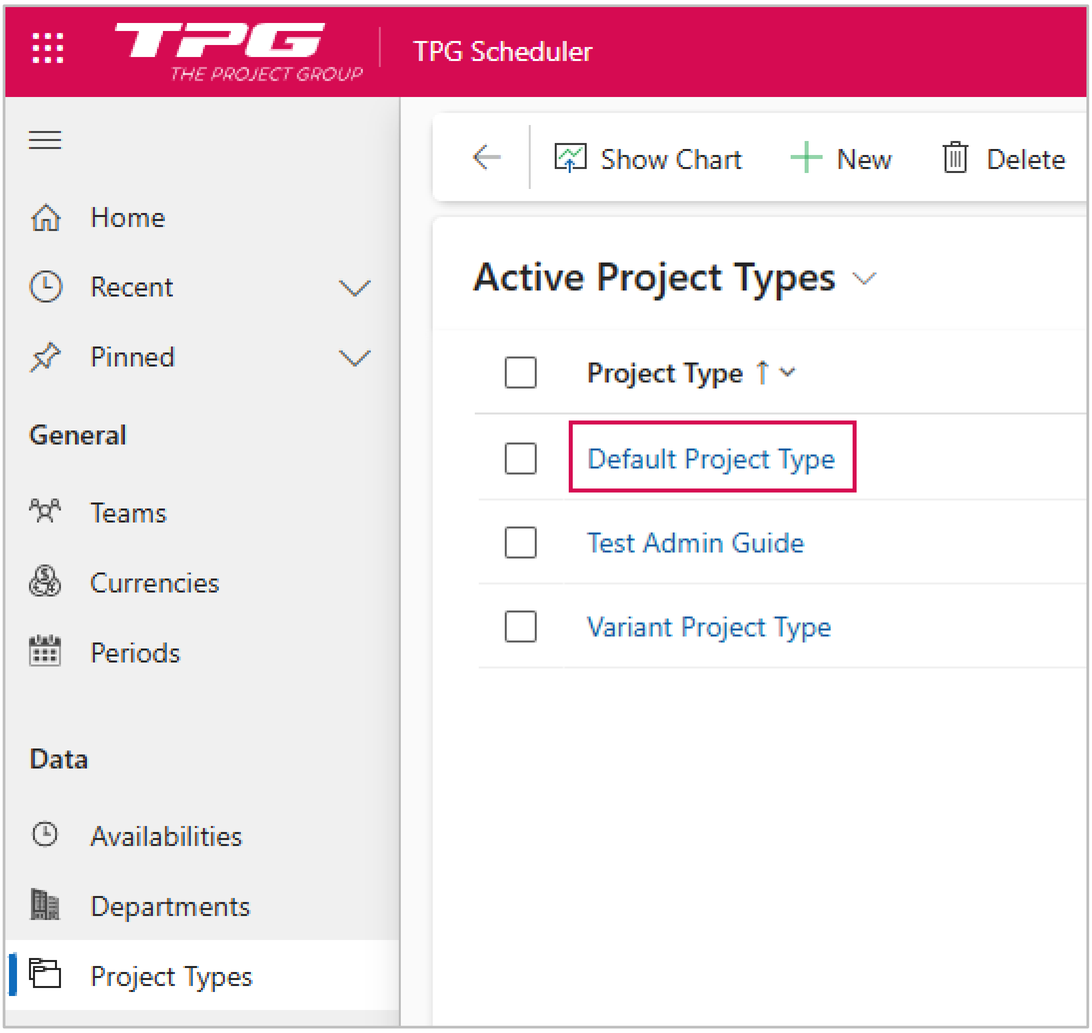
Editing an existing Project Type follows the same process as creating one: All fields that have already been created can be modified as described above.

⚠ Changes to a project type affect the entire system. Any modifications impact all projects that use this project type, as well as the associated plans and processes.

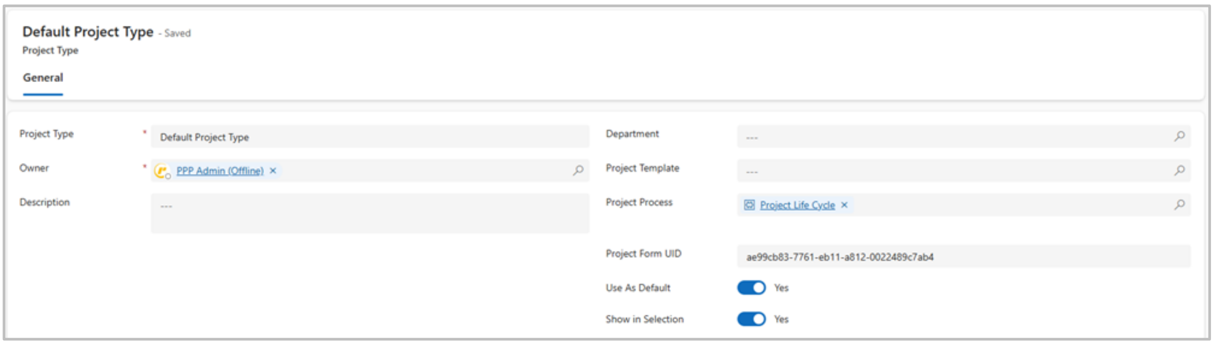
Therefore, make changes with extreme caution and verify their impact on the entire system.

▶ Fields that cannot be edited are marked as locked with a lock icon.

➢ Select the project type you want to edit, e.g. *Default Project Type*.



➢ In the *Active Project Types* view, click *Default Project Type*. ▶ The *Default Project Type* form opens.



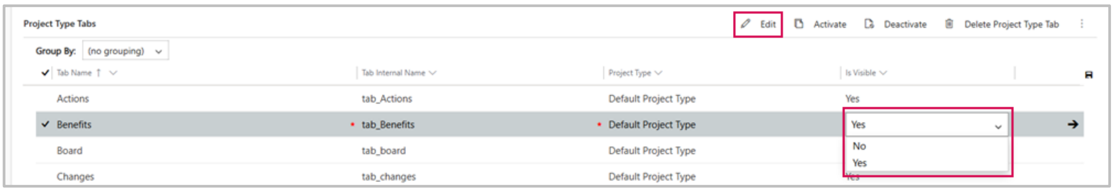
➢ Enter the desired changes.

You can edit the tab attributes directly in the table.

➢ Click on the desired cell in the table and enter the changes.

Or

➢ Click *Edit* and enter the changes in the project type form.



➢ Click *Save* or *Save & Close* on the command bar.

3.3 About

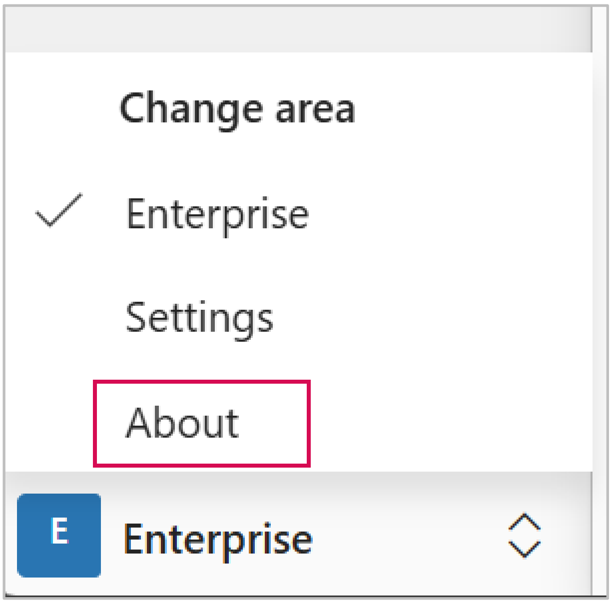
In the *About* section, you will find important information about PPP:

- Version number (1)
- Links to user manuals/online documentation, release notes, licenses and third-party notices (2)
- Integrated components (3)

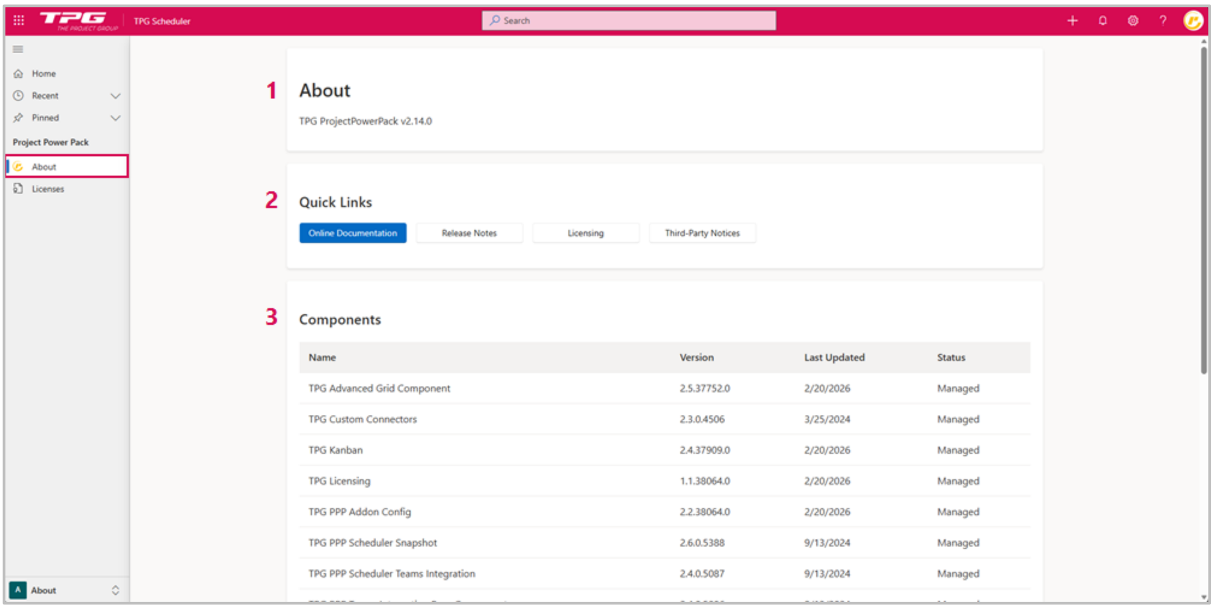
To access the product information, follow these steps:

➢ Click on *Enterprise* in the bottom navigation bar. ▶ A drop-down menu will appear.

➢ Click on *About.*



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



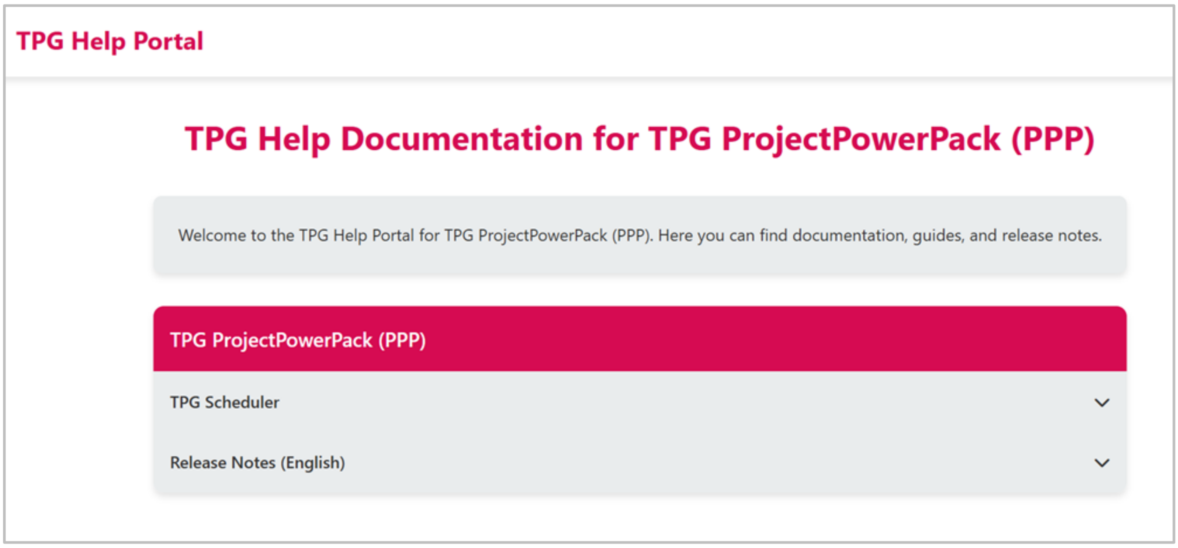
Opening User Guides and Release Notes:

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

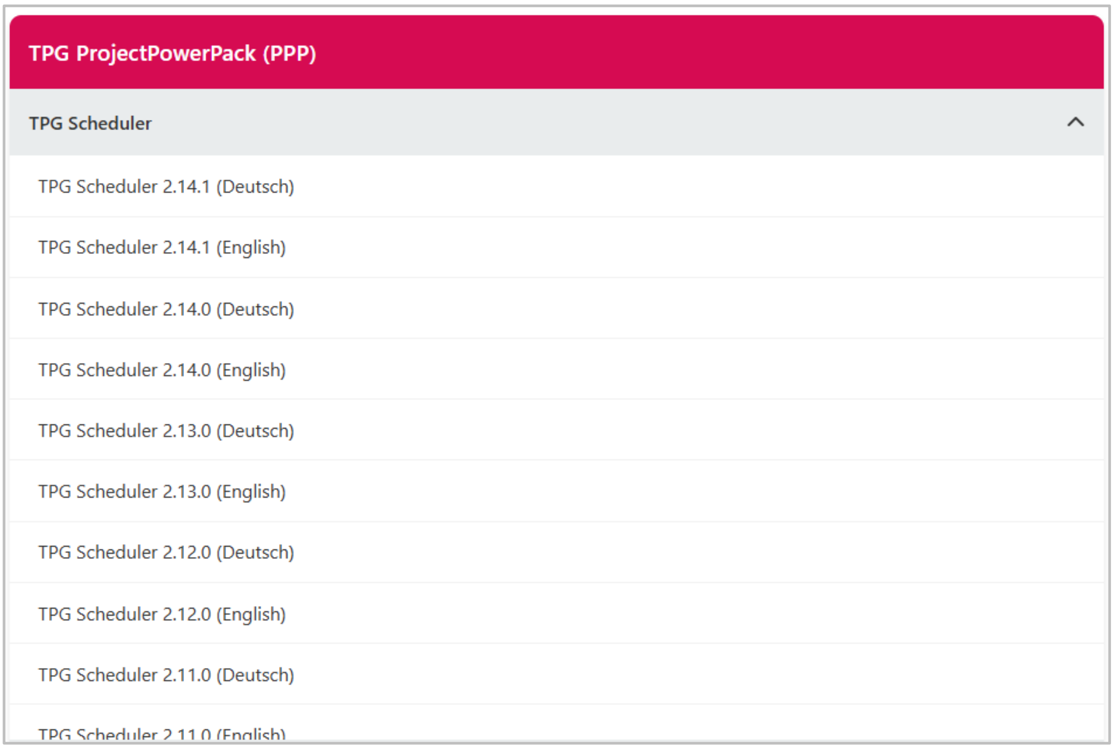
Or

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

▶ The *TPG Help Portal* will open.



➢ Click on *TPG Scheduler*. ▶ A drop-down 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.

Licensing:

➢ Click *Licenses* to view the license overview.

▶ Updating existing licenses and adding new licenses is described in the *Licenses* 67 section

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Third-Party Notices:

➢ Click on *Third-Party Notices* to view all third-party components used, as well as the associated license and copyright information.

Components:

The *Components* section provides a complete list of all software components included in the software.

Komponenten	Erläuterung
TPG Advanced Grid Component	Third-party table component used in the following apps: Resource Plan, Commitments, Finance, Timesheets.
TPG Custom Connectors	TPG Custom Connectors enable administrators to securely integrate PPP with the company-specific API.
TPG Kanban	Component for displaying a Kanban board with project tasks. TPG Kanban is included in the standard installation of PPP. Used in the Board & Actions apps.
TPG Licensing	A component for defining terms of use and permissions and importing a license key.
TPG PPP Addon Config	An app designed for configuring components. Add-ons can be configured without modifying the configuration JSON.
TPG PPP Scheduler Snapshot	Component for creating a snapshot of data.
TPG PPP Scheduler Teams Integration	A component for creating teams in TPG PPP and managing their members.
TPG PPP Teams Integration Base Components	A basic feature for creating teams and managing their members.
TPG Project Gantt	A component for visualizing project timelines in the form of a Gantt chart. Used in the Projects app.
TPG Project Variants	A component for managing and configuring different project variants within a project.
TPG ProjectPowerPack CoReSuite	Component for connecting PPP and CoReSuite.

Komponenten	Erläuterung
TPG ProjectPowerPack with Scheduler	TPG PPP with an integrated scheduler
TPG Risk Matrix	A component for assessing and presenting project risks based on their probability of occurrence and impact in a risk matrix.
TPG Scheduler TPG Scheduler Component	Components for scheduling project-related tasks.
TPG Scheduler Bulk Importer	Component for automatically importing large amounts of data into the scheduler.
TPG Scheduler Variants	A component for managing and configuring different versions of projects/tasks within the scheduler.
TPG Timesheet	Component for tracking project-related working hours of assigned resources.

3.3.1 Licenses

In this section, you will find all the features for managing the licenses stored in PPP. This includes viewing existing license information, such as type and validity. It also describes how to update existing licenses and add new ones.

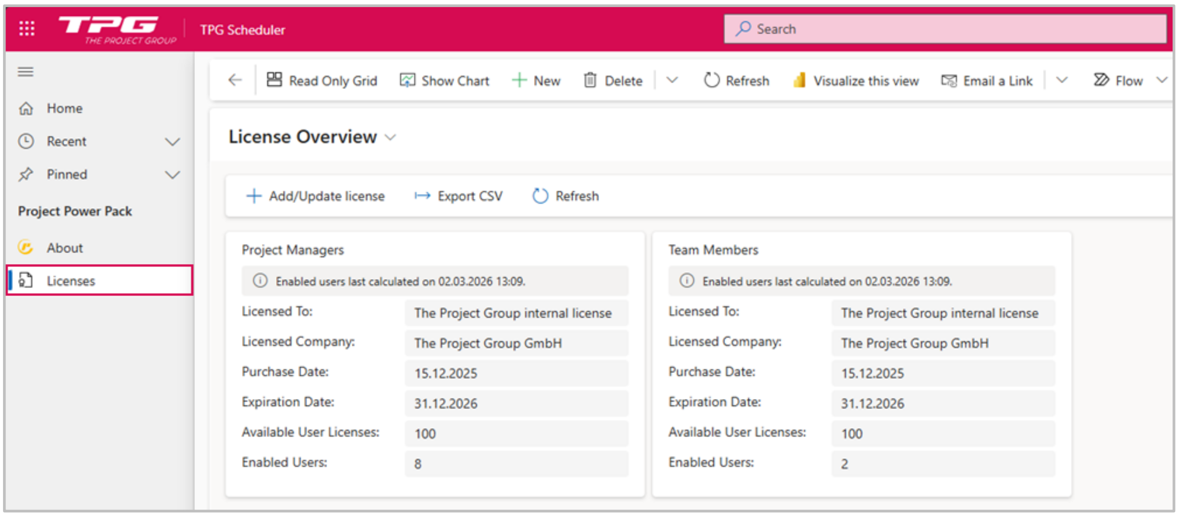
There are two ways to access the License Overview:

➢ Click *Licensing* in the About section. (see About 62)

Or

➢ Click *Licenses* in the navigation bar.

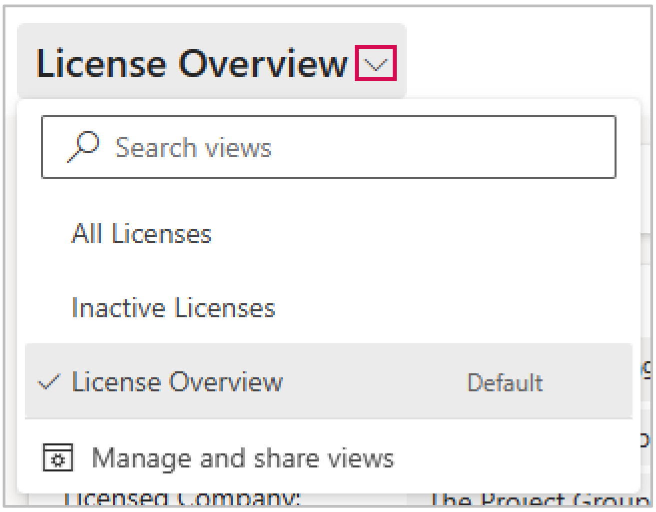
▶ The License Overview opens.



When you open the *Licenses* section, the license overview is displayed by default. In this view, you can see all currently registered licenses.

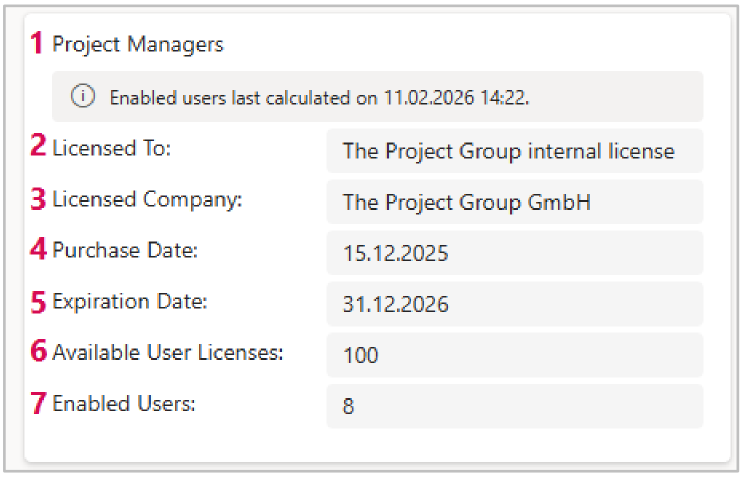
You can use the drop-down menu to switch to a different view:

- *All Licenses*: Tabular list of all licenses
- *Inactive Licenses*: Tabular list of all inactive licenses



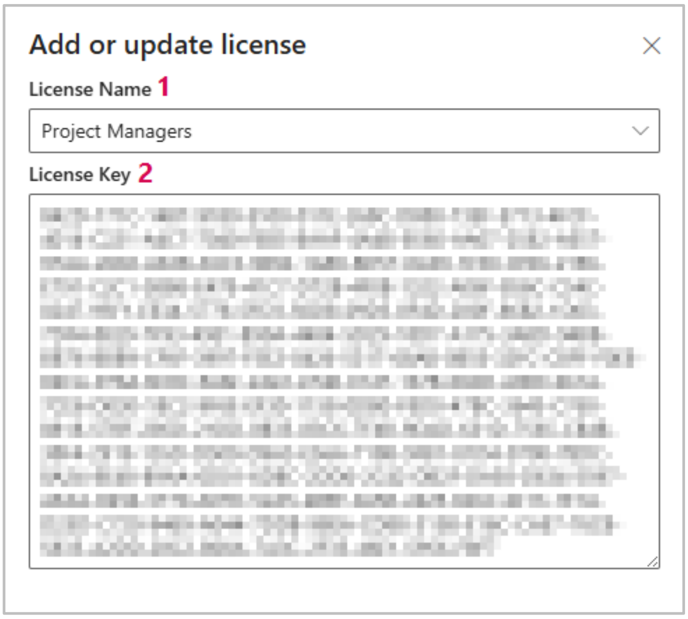
Each license comes with a license card (e.g., Project Managers) that displays the relevant details:

- License Type: (1)
  Specifies the type of license purchased, e.g., Project Manager, Project Team, or other available role or feature packages. The license type determines which features and permissions are available within PPP.
- Licensed to: (2)
  Displays the name of the person or organization to whom the license was issued.
- Licensed Company: (3)
  Specifies the company to which the license is assigned.
- Purchase Date: (4)
  The date on which the license was purchased.
- Expiration Date: (5)
  The date on which the license expires.
- Available User Licenses: (6)
  Total number of user licenses provided with the purchased license.
- Enabled Users: (7)
  Number of users to whom a license has already been assigned.



Add or update licenses:

- Click *Add/Update license.* ▶ The dialog box for entering the license key opens.
- Select the license type from the *License Name* drop-down menu. (1)
- Enter the *License Key*. (2)



- Click *Validate License* to add or update the license.. (3)

▶ The license has been added or updated.

▶ During the initial deployment of PPP, the licenses are initially installed by a TPG consultant. Administrators do not need to perform this step themselves.

For subsequent license changes or extensions, TPG will provide a new license key. This license key will be sent to you and can then be updated as described above.

Additional features:

- *Export CSV*: Download CSV file
- *Refresh*: Reload the license card display