

## TPG PPP - Scheduler User Guide 2.17 EN

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## Table of Contents

|          |                                            |           |
|----------|--------------------------------------------|-----------|
| <b>1</b> | <b>General Features .....</b>              | <b>7</b>  |
| 1.1      | Views and Functions PPP .....              | 7         |
| 1.2      | Configuration Options PPP .....            | 9         |
| <b>2</b> | <b>User Interface .....</b>                | <b>9</b>  |
| 2.1      | Overview .....                             | 10        |
| 2.2      | Workspace .....                            | 11        |
| 2.3      | Language Settings .....                    | 11        |
| 2.4      | Command Bar .....                          | 14        |
| 2.5      | Navigation Bar .....                       | 20        |
| 2.6      | Product Information .....                  | 21        |
| <b>3</b> | <b>Project .....</b>                       | <b>24</b> |
| 3.1      | Create new Project .....                   | 24        |
| 3.2      | Project Overview .....                     | 25        |
| 3.3      | Delete Project .....                       | 30        |
| <b>4</b> | <b>Project Details .....</b>               | <b>31</b> |
| 4.1      | General .....                              | 31        |
| 4.2      | Project KPIs .....                         | 33        |
| 4.3      | Project Estimates .....                    | 35        |
| 4.4      | Template .....                             | 36        |
| <b>5</b> | <b>Task planning in the Schedule .....</b> | <b>37</b> |
| 5.1      | Schedule - Views .....                     | 38        |
| 5.1.1    | Schedule - Buttons .....                   | 40        |
| 5.1.2    | Scheduler - Table .....                    | 42        |
| 5.1.3    | Schedule - Gantt Chart .....               | 46        |
| 5.1.4    | Board Tab .....                            | 47        |
| 5.2      | Create Task .....                          | 49        |
| 5.3      | Move Task .....                            | 53        |
| 5.4      | Undo and Redo Actions .....                | 53        |
| 5.5      | Define Duration of Task .....              | 54        |
| 5.6      | Convert Task to Milestone .....            | 55        |
| 5.7      | Define dependencies between Tasks .....    | 56        |

|          |                                                              |            |
|----------|--------------------------------------------------------------|------------|
| 5.7.1    | Define dependencies between Tasks - Table .....              | 57         |
| 5.7.2    | Define dependencies between Tasks - Gantt Chart .....        | 58         |
| 5.7.3    | Define dependencies between Tasks - Information Window ..... | 60         |
| 5.7.4    | Deactivate dependencies between Tasks .....                  | 62         |
| 5.8      | Task Attributes .....                                        | 63         |
| 5.8.1    | Change color of Task bar .....                               | 68         |
| 5.8.2    | Define Scheduling Mode .....                                 | 70         |
| 5.8.3    | Set Calendar for a Task .....                                | 74         |
| 5.8.4    | Create Rollup .....                                          | 76         |
| 5.8.5    | Deactivate Task .....                                        | 78         |
| 5.8.6    | Progress Indicator .....                                     | 79         |
| 5.8.7    | Add Note .....                                               | 82         |
| 5.9      | Inter-Project Links .....                                    | 84         |
| 5.9.1    | Create Inter-Project Links .....                             | 84         |
| 5.9.2    | Edit Inter-Project Links .....                               | 88         |
| <b>6</b> | <b>Resource Planning .....</b>                               | <b>92</b>  |
| 6.1      | Assign Resources in the Schedule .....                       | 92         |
| 6.2      | Project Team Tab - Assemble project team manually .....      | 96         |
| 6.3      | Resource Plan Tab - Create Resource Plan manually .....      | 98         |
| 6.4      | Automatically share a project with team members .....        | 103        |
| 6.5      | Inactive Resource .....                                      | 106        |
| 6.6      | Resource Plans Overview .....                                | 107        |
| 6.7      | Use Multi-year view in Resource Plan .....                   | 109        |
| <b>7</b> | <b>Budget Planning .....</b>                                 | <b>112</b> |
| <b>8</b> | <b>Status Update .....</b>                                   | <b>114</b> |
| 8.1      | Add Status Update .....                                      | 114        |
| 8.2      | Edit Status Update .....                                     | 117        |
| 8.3      | Deactivate and Activate Status Update .....                  | 118        |
| 8.4      | Adjust Table .....                                           | 120        |
| 8.5      | Further Commands for Status Updates .....                    | 122        |
| <b>9</b> | <b>Status Report .....</b>                                   | <b>124</b> |
| 9.1      | Timeline .....                                               | 126        |
| 9.2      | Financials .....                                             | 128        |
| 9.3      | Effort .....                                                 | 131        |

|           |                                                 |            |
|-----------|-------------------------------------------------|------------|
| 9.4       | Issues .....                                    | 133        |
| 9.5       | Risks .....                                     | 134        |
| 9.6       | Changes .....                                   | 135        |
| 9.7       | Actions .....                                   | 136        |
| 9.8       | Decisions .....                                 | 137        |
| 9.9       | Lessons .....                                   | 138        |
| 9.10      | Benefits .....                                  | 139        |
| 9.11      | Objectives .....                                | 140        |
| 9.12      | Requirements .....                              | 141        |
| 9.13      | Stakeholder .....                               | 142        |
| <b>10</b> | <b>Risks .....</b>                              | <b>143</b> |
| 10.1      | Add Risks .....                                 | 143        |
| 10.2      | Edit Risks .....                                | 147        |
| 10.3      | Deactivate and Activate Risks .....             | 148        |
| 10.4      | Risk Matrix .....                               | 150        |
| 10.5      | Additional Commands for Risks .....             | 151        |
| <b>11</b> | <b>Issues .....</b>                             | <b>153</b> |
| 11.1      | Add Issues .....                                | 153        |
| 11.2      | Edit Issues .....                               | 157        |
| 11.3      | Deactivate and Activate Issues .....            | 158        |
| 11.4      | Additional Commands for Issues .....            | 159        |
| <b>12</b> | <b>Changes .....</b>                            | <b>161</b> |
| 12.1      | Add Changes .....                               | 161        |
| 12.2      | Edit Changes .....                              | 167        |
| 12.3      | Deactivate and Activate Changes .....           | 168        |
| 12.4      | Additional Commands for Changes .....           | 170        |
| <b>13</b> | <b>Actions .....</b>                            | <b>172</b> |
| 13.1      | Actions - current Project .....                 | 172        |
| 13.1.1    | Create Actions .....                            | 176        |
| 13.1.2    | Edit Actions .....                              | 178        |
| 13.1.3    | Delete or move Actions .....                    | 183        |
| 13.2      | Actions - organize across projects .....        | 185        |
| 13.2.1    | Actions - show across projects .....            | 191        |
| 13.2.2    | Actions - create and edit across projects ..... | 192        |

|           |                                                 |            |
|-----------|-------------------------------------------------|------------|
| 13.2.3    | Actions - delete and move across projects ..... | 193        |
| <b>14</b> | <b>Decisions .....</b>                          | <b>198</b> |
| 14.1      | Add Decisions .....                             | 198        |
| 14.2      | Edit Decisions .....                            | 202        |
| 14.3      | Deactivate and Activate Decisions .....         | 203        |
| 14.4      | Additional Commands for Decisions .....         | 205        |
| <b>15</b> | <b>Stakeholders .....</b>                       | <b>207</b> |
| 15.1      | Add Stakeholders .....                          | 207        |
| 15.2      | Edit Stakeholders .....                         | 211        |
| 15.3      | Deactivate and Activate Stakeholders .....      | 212        |
| 15.4      | Additional Commands for Stakeholders .....      | 213        |
| <b>16</b> | <b>Objectives .....</b>                         | <b>215</b> |
| 16.1      | Add Objectives .....                            | 215        |
| 16.2      | Edit Objectives .....                           | 219        |
| 16.3      | Deactivate and Activate Objectives .....        | 220        |
| 16.4      | Additional Commands for Objectives .....        | 221        |
| <b>17</b> | <b>Benefits .....</b>                           | <b>223</b> |
| 17.1      | Add Benefits .....                              | 223        |
| 17.2      | Edit Benefits .....                             | 228        |
| 17.3      | Deactivate and Activate Benefits .....          | 229        |
| 17.4      | Additional Commands for Benefits .....          | 230        |
| <b>18</b> | <b>Requirements .....</b>                       | <b>232</b> |
| 18.1      | Add Requirements .....                          | 232        |
| 18.2      | Edit Requirements .....                         | 237        |
| 18.3      | Deactivate and Activate Requirements .....      | 238        |
| 18.4      | Additional Commands for Requirements .....      | 239        |
| <b>19</b> | <b>Lessons Learned .....</b>                    | <b>241</b> |
| 19.1      | Add Lessons Learned .....                       | 241        |
| 19.2      | Edit Lessons Learned .....                      | 244        |
| 19.3      | Deactivate and Activate Lessons Learned .....   | 245        |
| 19.4      | Additional Commands for Lessons Learned .....   | 247        |
| <b>20</b> | <b>Drivers .....</b>                            | <b>249</b> |
| 20.1      | Load and rate drivers .....                     | 249        |
| 20.2      | Create and view drivers .....                   | 253        |

|           |                                              |            |
|-----------|----------------------------------------------|------------|
| 20.3      | Priority Dashboard .....                     | 256        |
| <b>21</b> | <b>Timesheets .....</b>                      | <b>259</b> |
| 21.1      | User interface for Timesheets .....          | 260        |
| 21.2      | Assign permissions .....                     | 264        |
| 21.3      | Add tasks to Timesheets .....                | 266        |
| 21.4      | Record working time .....                    | 273        |
| 21.5      | Approve entries .....                        | 278        |
| 21.6      | View approved entries in the project .....   | 279        |
| <b>22</b> | <b>Project Variants .....</b>                | <b>280</b> |
| 22.1      | User Interface .....                         | 281        |
| 22.2      | Working with Variants .....                  | 282        |
| 22.2.1    | Create a Variant .....                       | 282        |
| 22.2.2    | Edit a Variant .....                         | 286        |
| 22.2.3    | Compare Variants and Original Projects ..... | 289        |

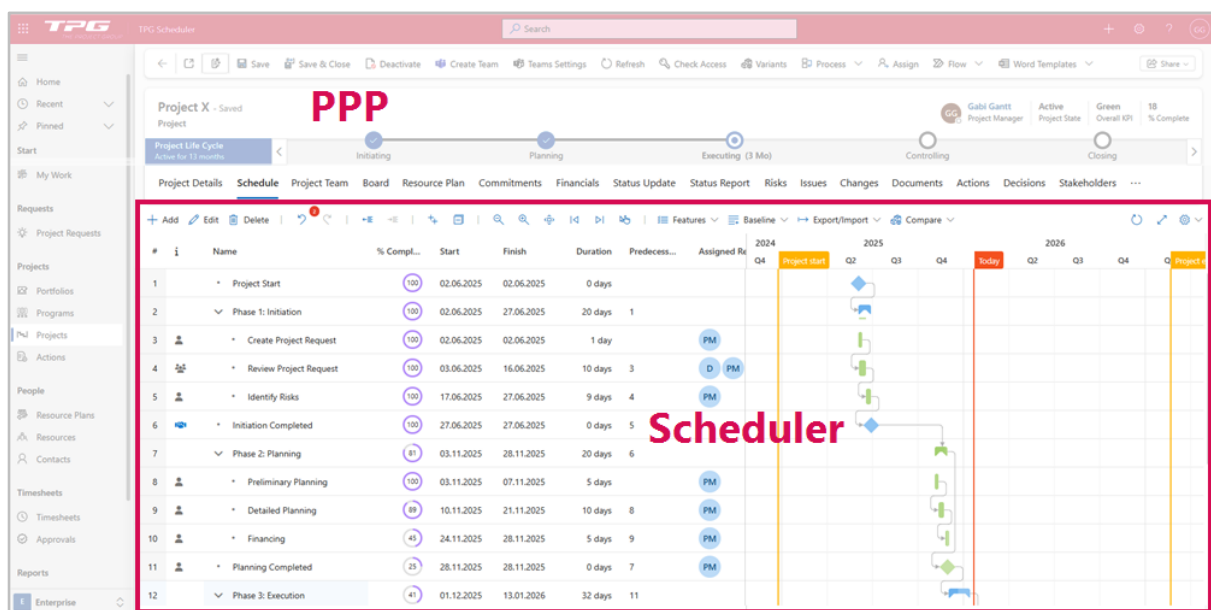
# 1 General Features

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**<sup>37</sup> 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**<sup>37</sup> with traffic light indicators and project attributes (progress, KPI, start and finish date, etc.)
- **Kanban view of actions**<sup>172</sup>
- **Resource management**<sup>92</sup> with resource attributes (department, cost rate, availability)
- Project requests with drivers and approval process

- Assignment of project types and templates
- **Task planning**<sup>[37]</sup> and **resource allocation**<sup>[92]</sup> with TPG Scheduler
- **Recording of budget, forecasts and actual values**<sup>[112]</sup> in time periods
- **Risks**<sup>[143]</sup>, **problems**<sup>[153]</sup>, **changes**<sup>[161]</sup>, **actions**<sup>[172]</sup> and **decisions**<sup>[198]</sup> at project level
- Project assignment: **drivers**<sup>[249]</sup>, **objectives**<sup>[215]</sup>, **benefits**<sup>[223]</sup>, **requirements**<sup>[232]</sup>
- **Stakeholder analysis**<sup>[207]</sup> and **Lessons Learned**<sup>[241]</sup>
- **Inter-project Links**<sup>[84]</sup>
- **Status Update**<sup>[114]</sup> and **Status Report**<sup>[124]</sup>
- Comprehensive **reporting package**<sup>[124]</sup>
- 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.

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## 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
- **Language settings**  11
- **Navigation bar**  20

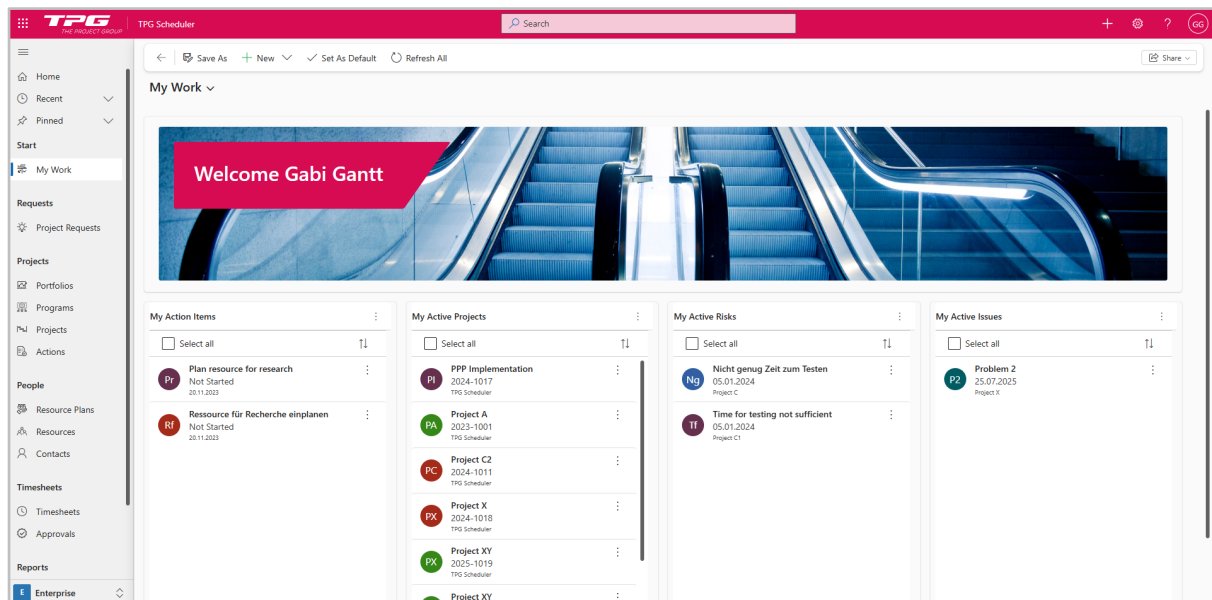
## 2.1 Overview

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

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

Linked data records:

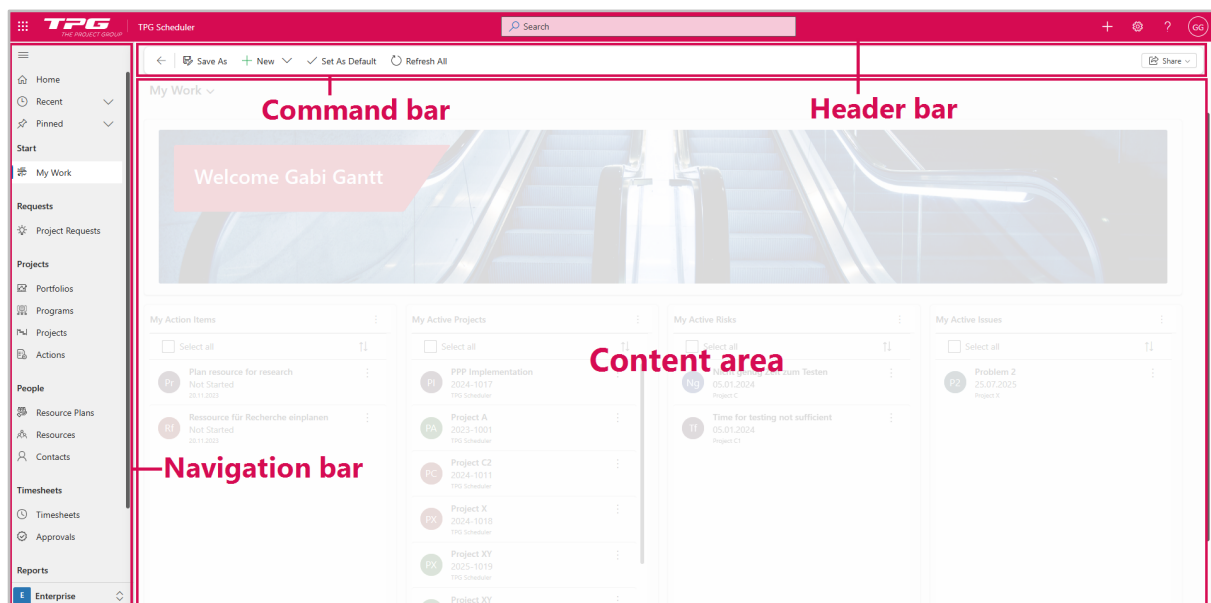
- My Action Items
- My Active Projects
- My Active Risks
- My Active Issues



## 2.2 Workspace

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

- **Header bar:** Search function, buttons for quick data entry, notifications, personalization settings, etc.
- **Command bar:** 14 Buttons depending on the content area
- **Navigation bar:** 20: 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



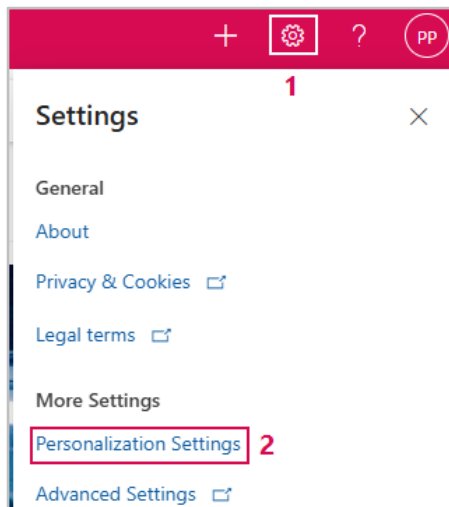
## 2.3 Language Settings

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

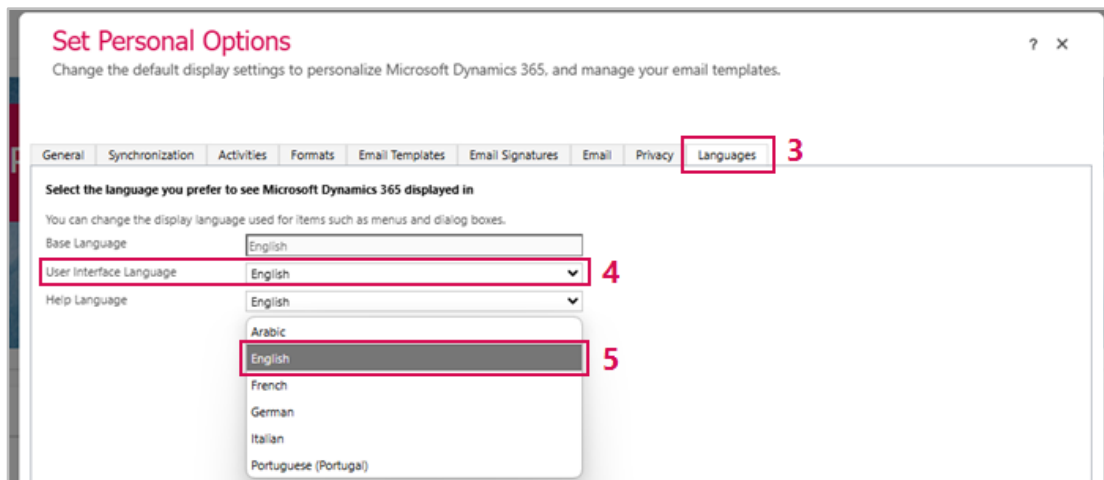
You can specify the language under *Personalization Settings*:

- 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).

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities **Formats** Email Templates Email Signatures Email Privacy Languages

**Personal Standards and Formats**  
Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

**Current Format**  
English (United Kingdom) Customize...

- English (South Africa)
- English (Trinidad and Tobago)
- English (United Arab Emirates)
- English (United Kingdom)**
- English (United States)

- Click on *OK* (9)

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

**Personal Standards and Formats**  
Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

**Current Format**  
English (United Kingdom) Customize...

**Format Preview**

|            |                 |
|------------|-----------------|
| Number     | 123,456,789.00  |
| Currency   | £123,456,789.00 |
| Time       | 14:19           |
| Short Date | 25/03/2025      |
| Long Date  | 25 March 2025   |

**OK** Cancel

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

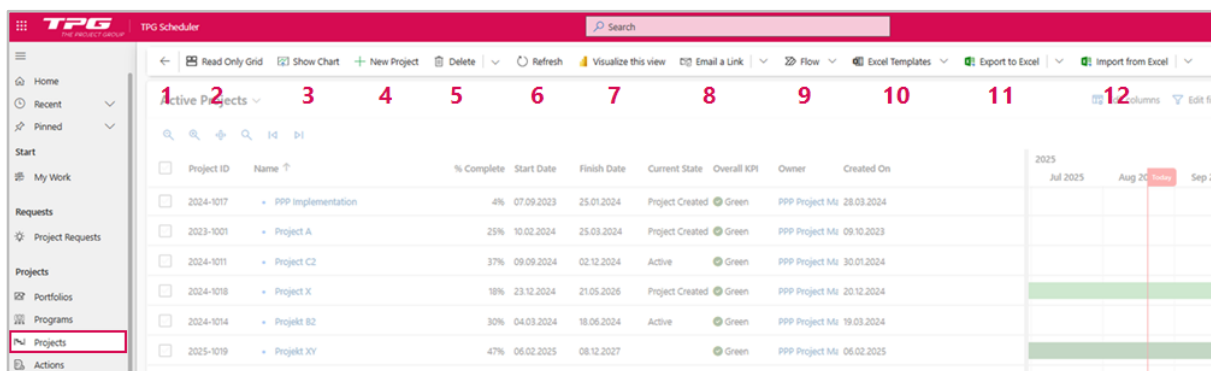
## 2.4 Command Bar

The Command Bar is located above the **Content Area** <sup>11</sup>.

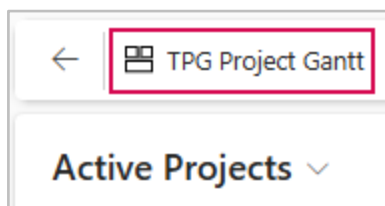
The Command Bar contains buttons that provide you with various functions depending on the Content Area (e.g., *Home, Portfolios, Programs, Projects, Actions*). Some of these buttons are standardized and the same in every view, while others are displayed additionally depending on the Content Area.

### Projects Content Area view

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

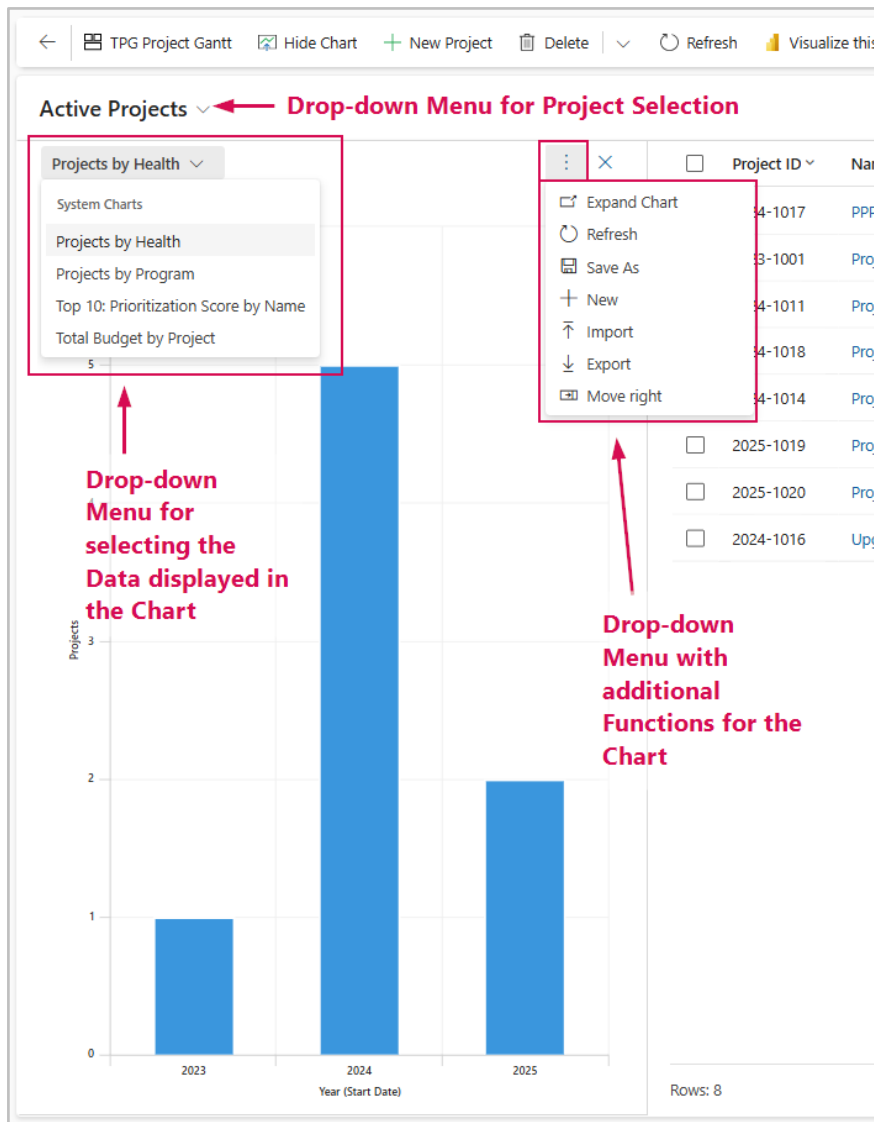


- **Go Back:** Navigates to the previously opened page. (1)
- **Read Only Grid:** Gantt Chart is hidden. (2)
  - Click on **Read Only Grid** ➤ The Gantt Chart is hidden and only the table with the active projects is displayed.
  - Click on **TPG Project Gantt** to display the Gantt Chart again.

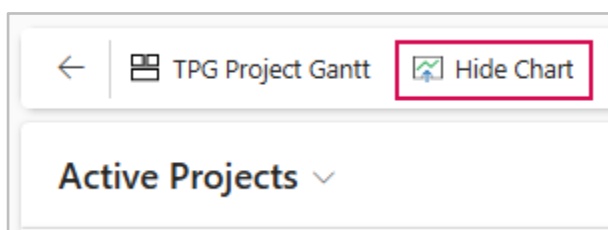


- **Show Chart:** Displays charts for the data records in the table in the Content Area (e.g., *Projects*). (3)

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



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

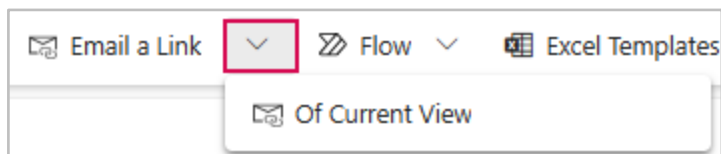


- *New Project*: Create a new Project. (4)
- *Delete*: Deletes the Projects. (5)

⚠ This action cannot be undone.

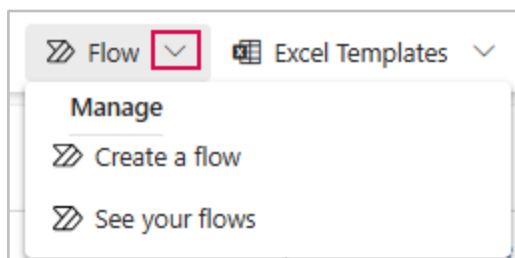
- *Refresh*: Page is being updated. (6)
- *Visualize this view*: Creation of a visual report in Power BI about the current view. (7)
- *Email a Link*: Sends a link to selected data records by email. (8)

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



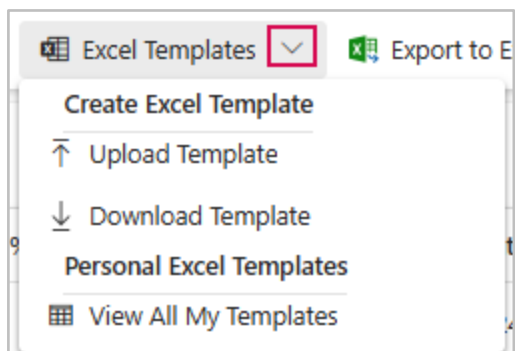
- *Flow*: Runs a Flow for the selected project. (9)

➤ 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:

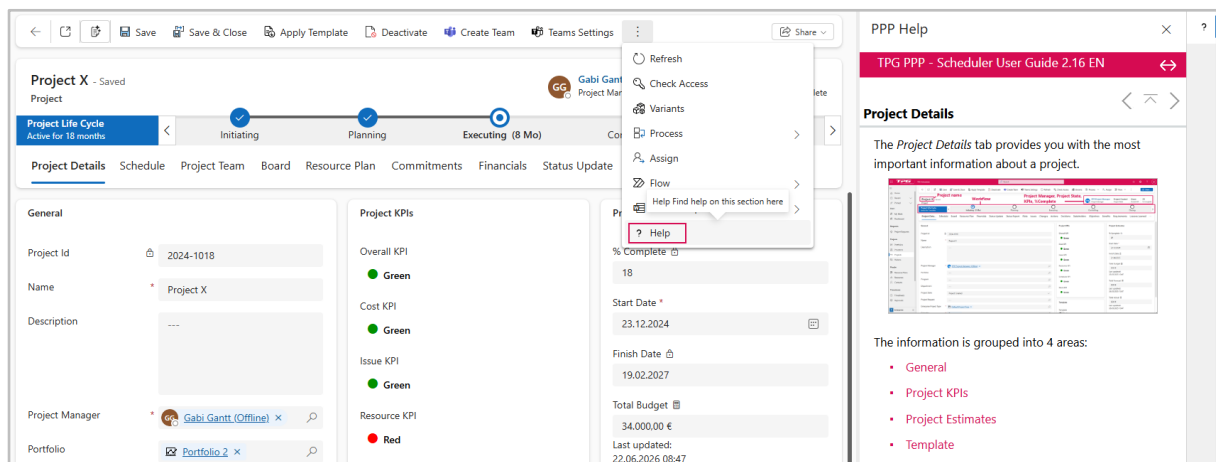
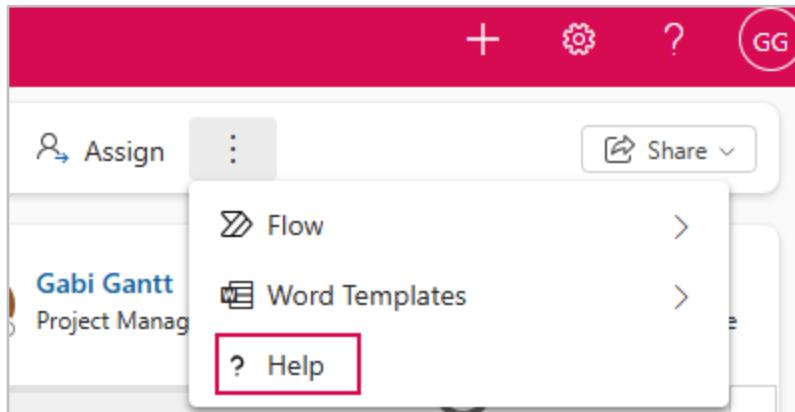
- *Edit:* Edit Project.
- *Activate:* Activate Project.
- *Deactivate:* Deactivate Project.
- *Assign:* Changes the owner of the selected Project.
- *Share:* Shares the Project with selected individuals or teams without changing ownership.
- *Word Templates:* Creates Word documents and templates.

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

## View within a Project

Once a project is open, project-specific commands appear in the command bar:

- **Help:** Opens the relevant help page in a panel, allowing you to access the user guide for the currently displayed area directly.



The following table lists additional commands available in the command bar within a project.

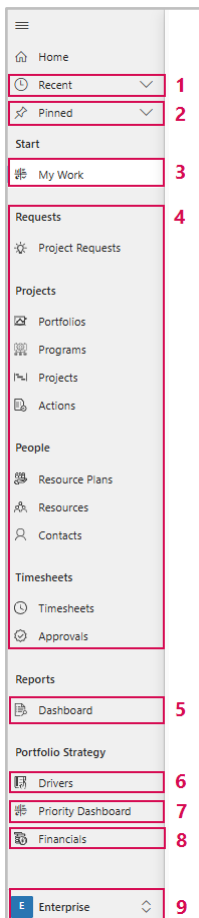
The commands displayed depend on the user's permissions.

| Commands               | Description                                                                                                                                         |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Create Team</i>     | Create a team in MS Teams for this project                                                                                                          |
| <i>Teams Settings</i>  | Open the Teams settings for this project                                                                                                            |
| <i>Check Access</i>    | This command displays which users and teams have access permissions for each tab. You can also view the permissions for each user in detail.        |
| <i>Variants</i>        | Manage Project Variants (see <a href="#">Project Variants</a>  ) |
| <i>Process</i>         | Switch Processing Mode                                                                                                                              |
| <i>Open Core Suite</i> | Opens the CoReSuite website in a separate browser tab.                                                                                              |

## 2.5 Navigation Bar

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

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



## 2.6 Product Information

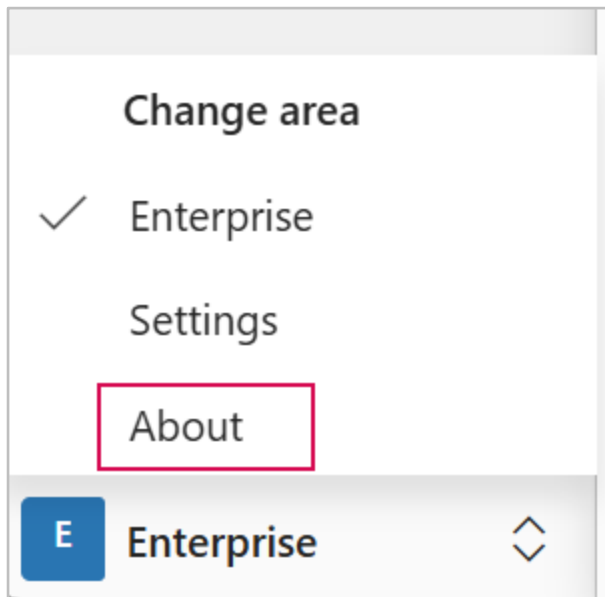
In the *About* section, you will find important information about PPP:

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

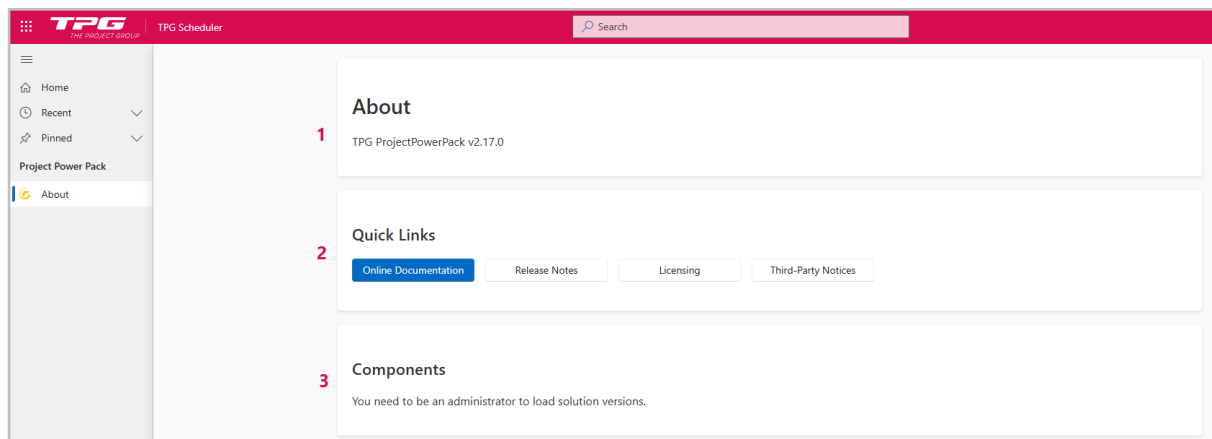
To access the product information, follow these steps:

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

➤ Click on *About*.



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



### Opening User Guides and Release Notes:

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

Or

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

► The *TPG Help Portal* will open.

## TPG Help Portal

### TPG Help Documentation for TPG ProjectPowerPack (PPP)

Welcome to the TPG Help Portal for TPG ProjectPowerPack (PPP). Here you can find documentation, guides, and release notes.

#### TPG ProjectPowerPack (PPP)

TPG Scheduler



Release Notes (English)



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

| TPG ProjectPowerPack (PPP)     |   |
|--------------------------------|---|
| TPG PPP Scheduler User Guides  | ^ |
| TPG Scheduler 2.17.0 (Deutsch) |   |
| TPG Scheduler 2.17.0 (English) |   |
| TPG Scheduler 2.16.0 (Deutsch) |   |
| TPG Scheduler 2.16.0 (English) |   |
| TPG Scheduler 2.15.0 (Deutsch) |   |
| TPG Scheduler 2.15.0 (English) |   |
| TPG Scheduler 2.14.1 (Deutsch) |   |
| TPG Scheduler 2.14.1 (English) |   |

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

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

## 3 Project

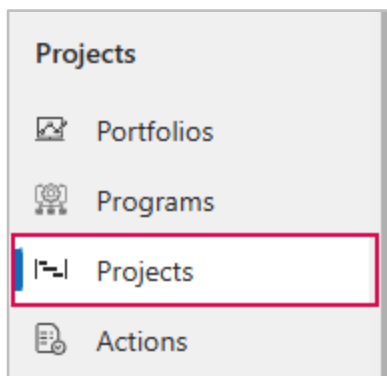
This section describes how to create a new project with TPG PPP.

- [Create new Project](#) <sup>24</sup>
- [Project Overview](#) <sup>25</sup>
- [Delete Project](#) <sup>30</sup>

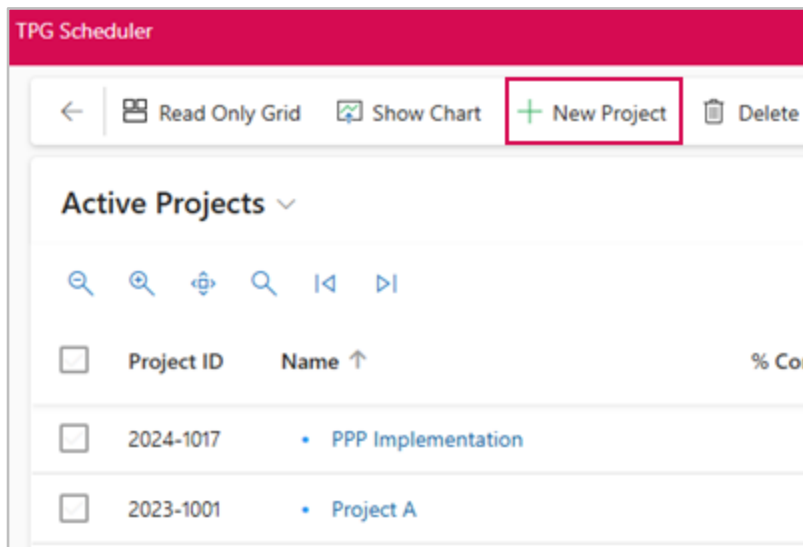
### 3.1 Create new Project

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

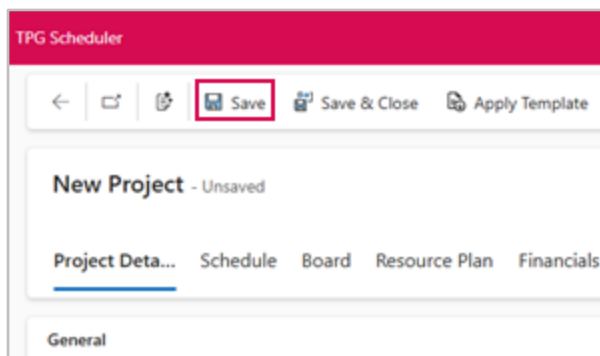
- Click on *Projects* in the navigation bar. ➤ A list with all **active projects** <sup>25</sup> opens.



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



- Fill in the project master data. (see [Project Details](#) <sup>31</sup>)
- Click *Save* in the command bar.



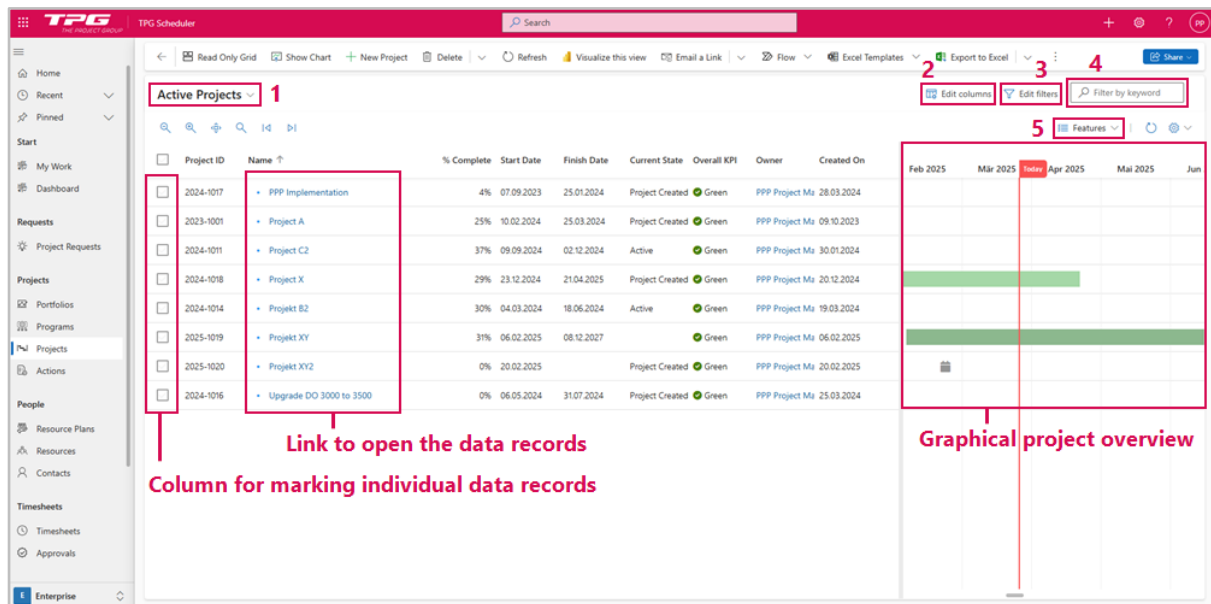
- A new project is created.

## 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).

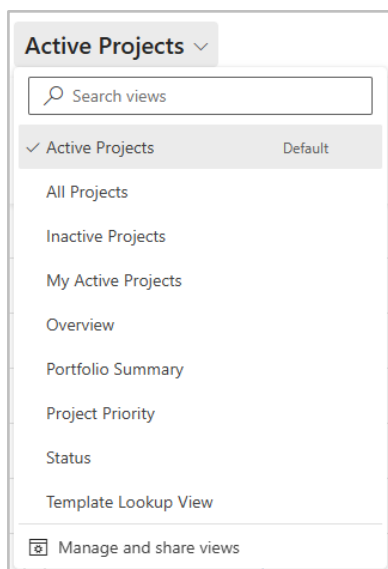


Link to open the data records  
Column for marking individual data records

Graphical project overview

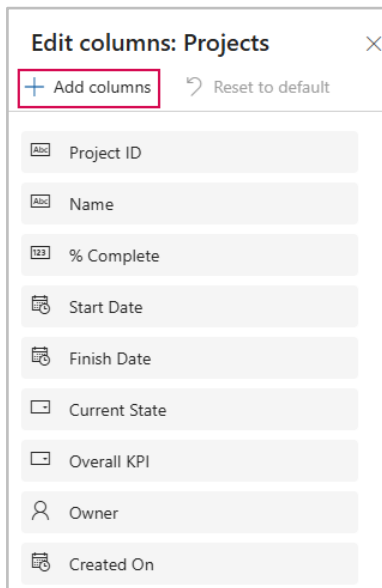
There are options to customize the view:

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

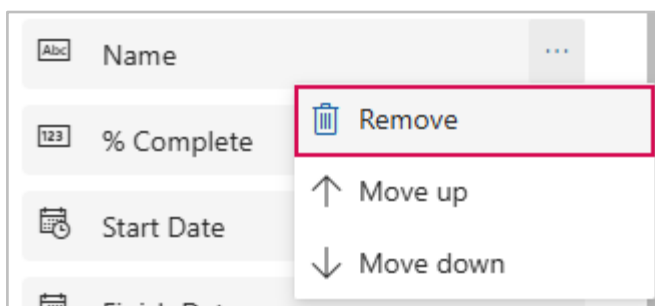


- Edit columns* (2): Add columns and change the order of the columns using drag & drop.
  - Click on *Edit columns*. (2) ► A form opens.

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



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



- Click *Reset to default* to restore the default settings.
- Click on *Apply* to apply the changes to the view.
- *Edit filters (3)*: Filter options for displayed projects.
  - Click on *Add*. ► A drop-down menu opens.

- In the drop-down menu, select whether you want to add a row, a group or an associated entity.

**Edit filters: Projects**

Reset to default Delete all filters

| AND                      | Field      | Operator       | Value  |
|--------------------------|------------|----------------|--------|
| <input type="checkbox"/> | Status     | Equals         | Active |
| <input type="checkbox"/> | Template   | Does not equal | Yes    |
| <input type="checkbox"/> | Is Variant | Does not equal | Yes    |

+ Add

- Add row
- Add group
- Add related 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.

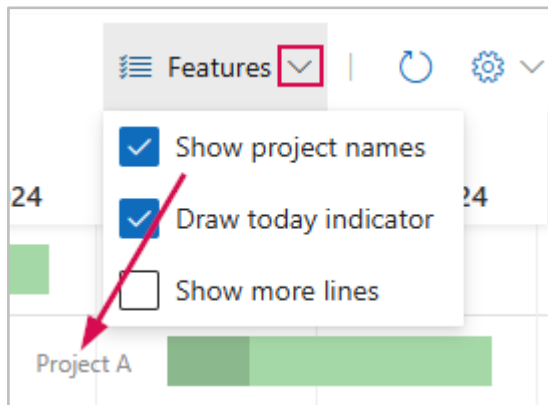
| Field      | Operator       | Value  |
|------------|----------------|--------|
| Status     | Equals         | Active |
| Template   | Does not equal | Yes    |
| Is Variant | Does not equal | Yes    |

Delete

Make group

- 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.



### 3.3 Delete Project

Projects can be deleted from the overview page.

To delete a project:

- Select the desired project.
- Activate the project's checkbox. (1)
- Click *Delete* in the command bar. (2)

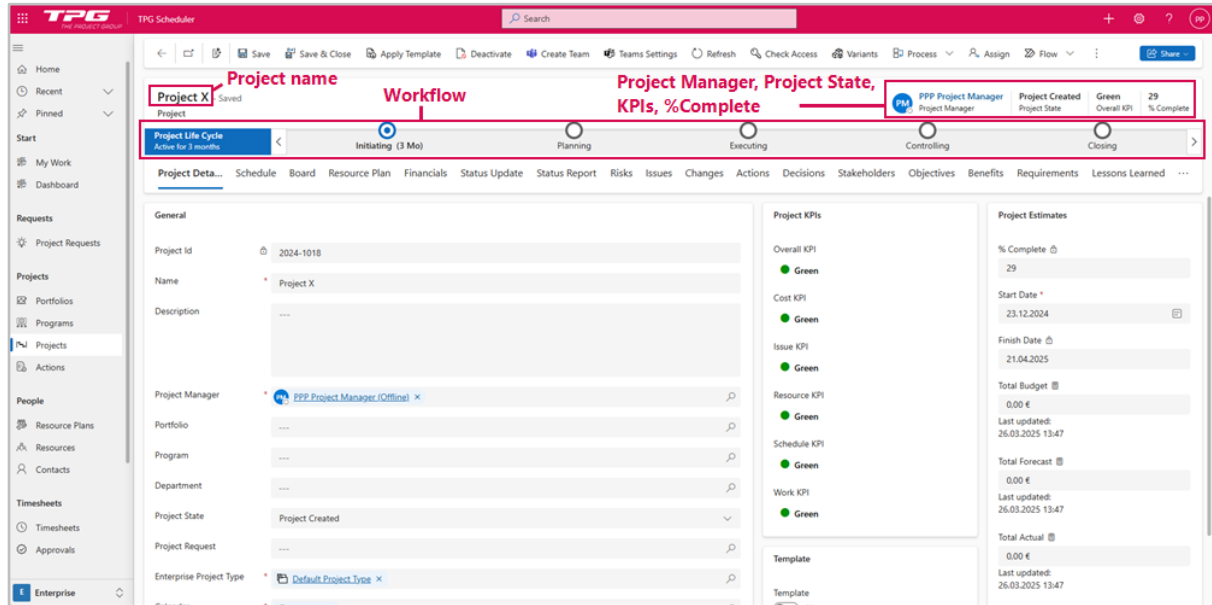
The screenshot shows the 'Active Projects' section of the TPG Scheduler. The command bar at the top includes buttons for 'Read Only Grid', 'Show Chart', 'Edit', 'Activate', 'Deactivate', and 'Delete'. The 'Delete' button is highlighted with a red box and labeled '2'. Below the command bar, the 'Active Projects' table is displayed. The table has columns for 'Project ID', 'Name', 'Scheduli...', and '% Compl...'. The last row, 'Project XY' with ID '2025-1019', is selected and highlighted in blue. Its checkbox is checked and highlighted with a red box and labeled '1'.

|                                     | Project ID | Name                 | Scheduli... | % Compl... |
|-------------------------------------|------------|----------------------|-------------|------------|
| <input type="checkbox"/>            | 2024-1017  | • PPP Implementation | TPG Sched   | 4          |
| <input type="checkbox"/>            | 2023-1001  | • Project A          | TPG Sched   | 25         |
| <input type="checkbox"/>            | 2023-1003  | • Project B1         | TPG Sched   | 24         |
| <input type="checkbox"/>            | 2023-1006  | • Project C          | TPG Sched   | 26         |
| <input type="checkbox"/>            | 2023-1007  | • Project C1         | TPG Sched   | 26         |
| <input type="checkbox"/>            | 2024-1011  | • Project C2         | TPG Sched   | 37         |
| <input type="checkbox"/>            | 2024-1018  | • Project X          | TPG Sched   | 19         |
| <input checked="" type="checkbox"/> | 2025-1019  | • Project XY         | TPG Sched   | 15         |

- 
- ▶ When you delete a project, all associated project snapshots are automatically deleted as well.
-

## 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**  31
- **Project KPIs**  33
- **Project Estimates**  35
- **Template**  36

### 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.

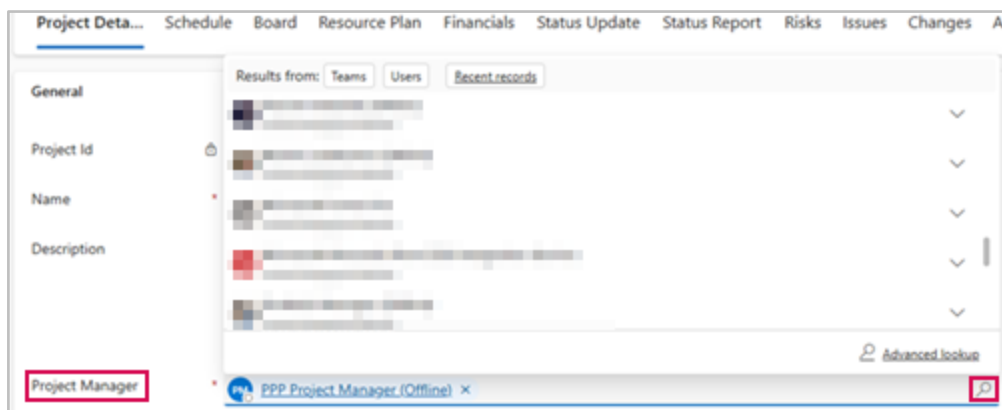
➤ Click in the field and enter the name of the project.

▪ **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*.

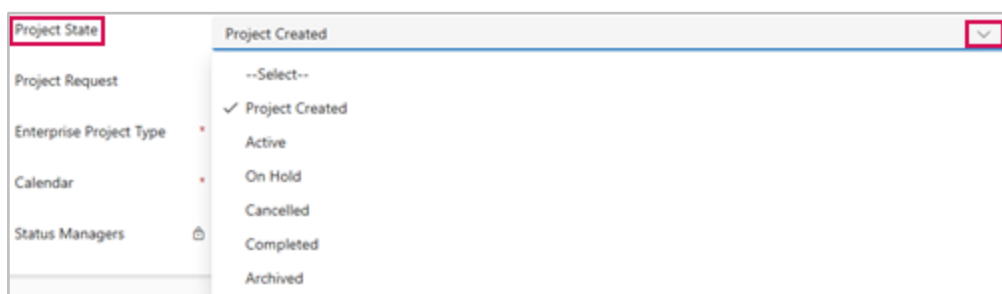
▪ **Department:** Assign project to a department.

► Follow the steps described above for the *Project Manager*.

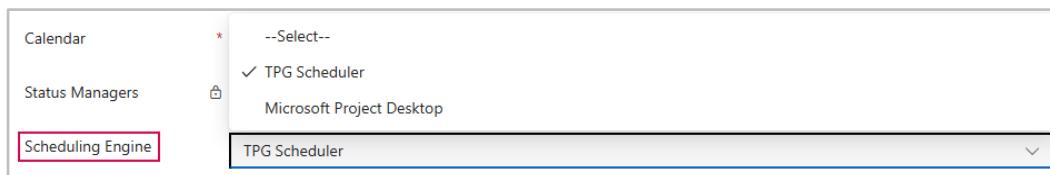
▪ **Project State:** Set project state.

➤ 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.
- **Scheduling Engine:** In the Scheduling Engine field, select the scheduling logic for the project. This determines how dates are calculated and how changes affect the project plan.



The screenshot shows a configuration window with a sidebar on the left containing three items: 'Calendar' with a red asterisk, 'Status Managers' with a lock icon, and 'Scheduling Engine' which is highlighted with a red box. The main area of the window displays a dropdown menu for the 'Scheduling Engine' field. The dropdown is open, showing three options: '--Select--', '✓ TPG Scheduler', and 'Microsoft Project Desktop'. The 'TPG Scheduler' option is currently selected and highlighted in blue.

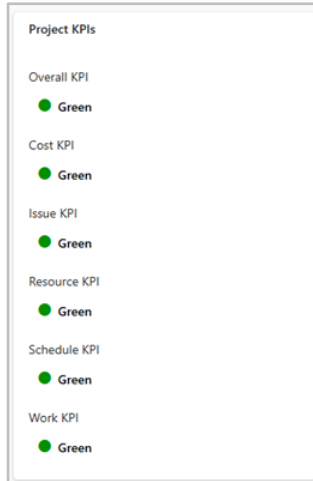
## 4.2 Project KPIs

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.

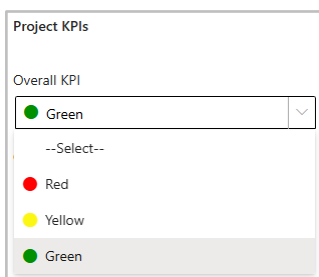
---

► 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

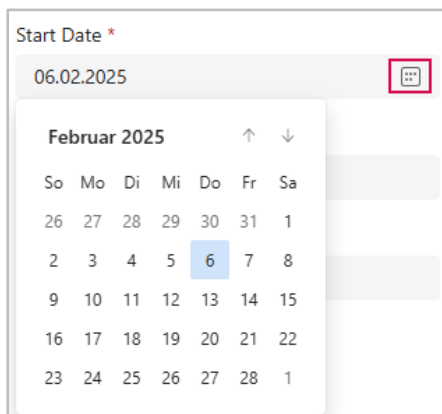
In this section you will find an overview of the project budget and schedule:

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

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

➤ *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](#) )

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

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

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

► Budgets are entered on the *Finances* tab.

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

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

➤ Click on *Recalculate*. (2)

▶ The value is recalculated.

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

| Field                 | Value            |
|-----------------------|------------------|
| % Complete            | 31               |
| Start Date            | 06.02.2025       |
| Finish Date           | 08.12.2027       |
| Total Budget          | 15,000.00 €      |
| Last updated:         | 27.03.2025 06:47 |
| Total Forecast        | 15,500.00 €      |
| Last updated:         | 27.03.2025 06:47 |
| Total Actual          | 10,500.00 €      |
| Last updated:         | 27.03.2025 06:47 |
| Last Timesheet Rollup |                  |

A red box highlights the 'Recalculate' button next to the 'Total Budget' field.

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

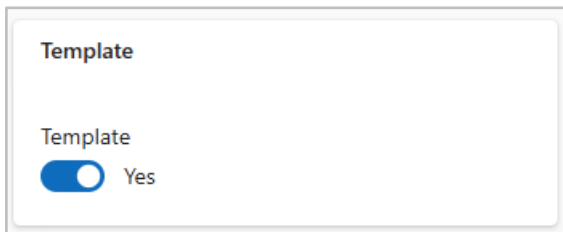
▶ Data records can be found under *Timesheets*. (see [Navigation Bar](#) )

## 4.4 Template

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

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

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



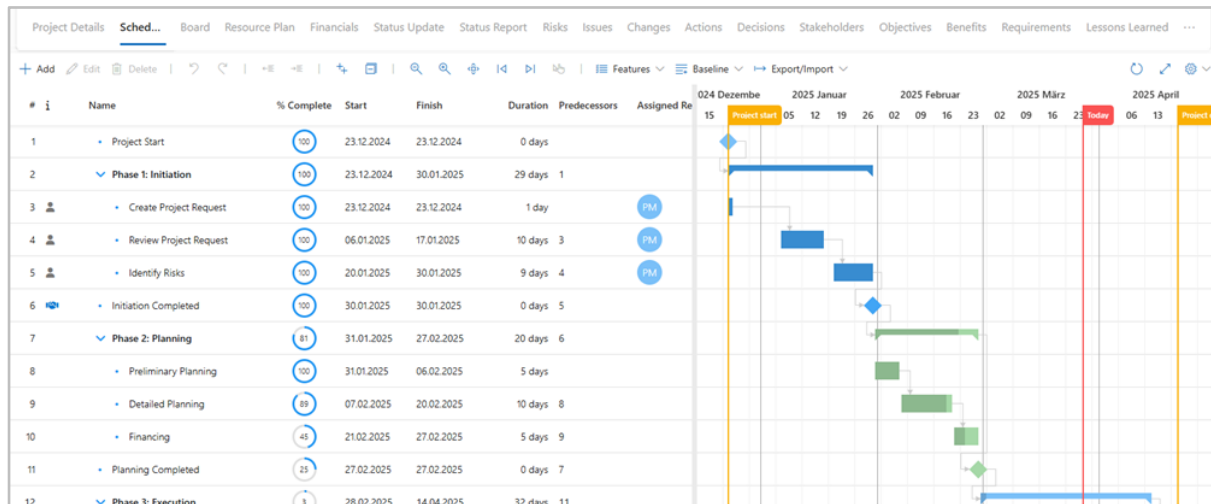
## 5 Task planning in the Schedule

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

- **Scheduler**  38
- **Create Task**  49
- **Move Task**  53
- **Undo and Redo Actions**  53
- **Define Duration of Task**  54
- **Convert Task to Milestone**  55
- **Define dependencies between Tasks**  56
- **Assign Task Attributes**  63
- **Create and edit Inter-Project Links**  84
- **Ressource Planning**  92

## 5.1 Schedule - Views

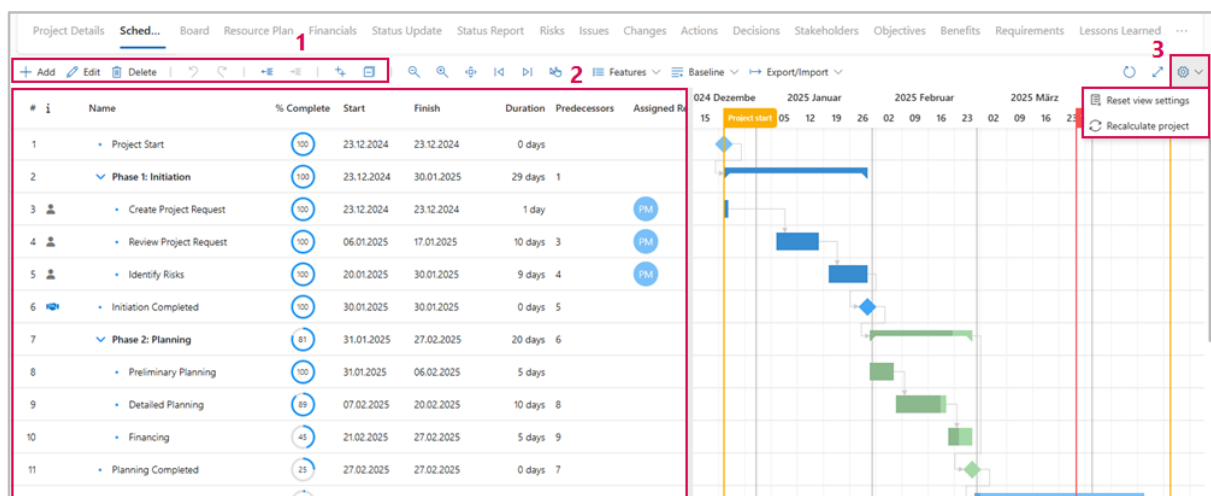
Task planning and resource allocation take place on the *Schedule* tab. TPG Scheduler provides a tabular (left) and graphical (right) overview of the project:



► 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)



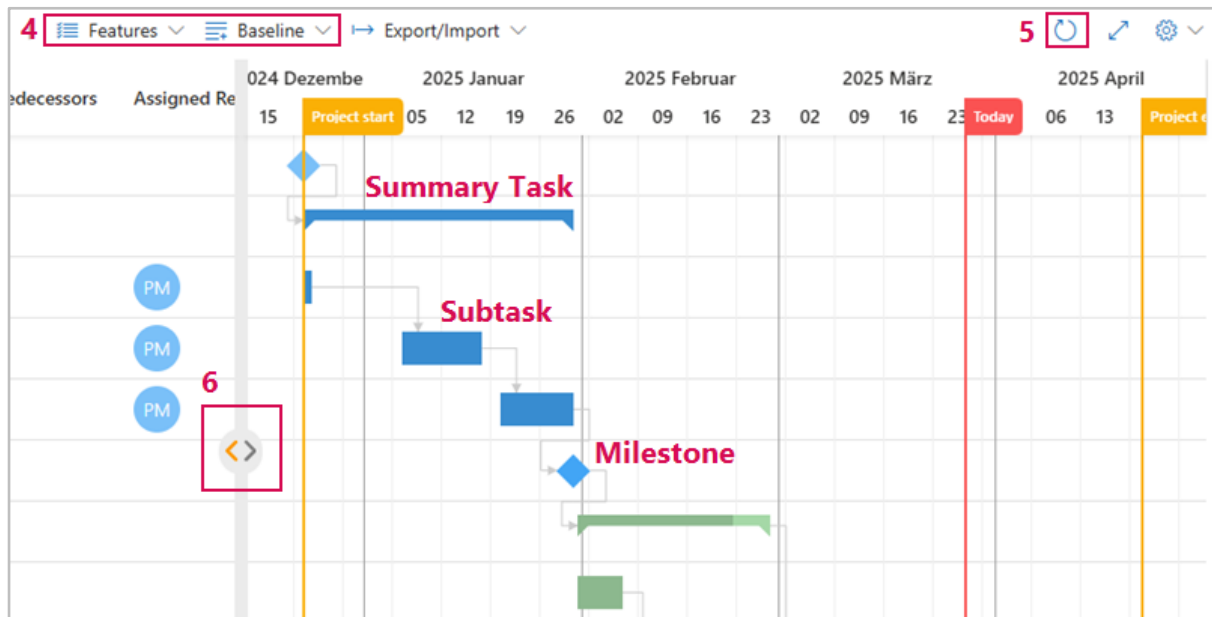
### Graphical View as Gantt Chart and Functions:

- 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.

---



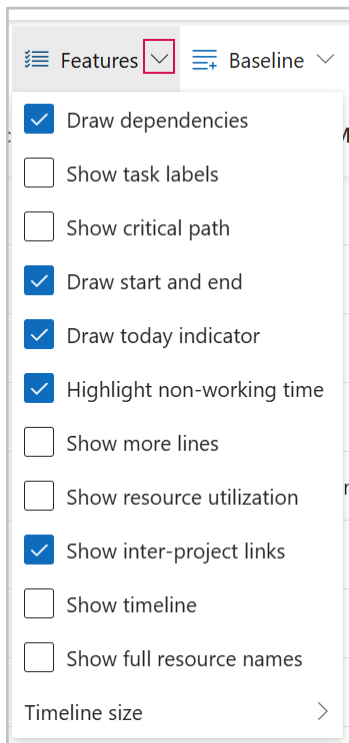
### 5.1.1 Schedule - Buttons

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

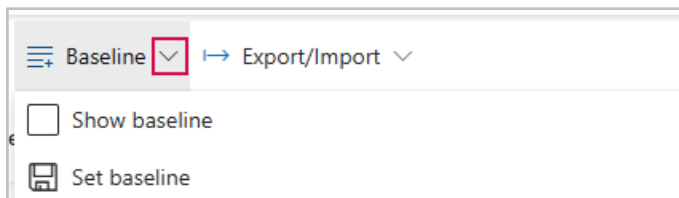


- **Add (1):** Add a new task.
- **Edit (2):** Edit task.
- **Delete (3):** Delete task.
- **Undo last action and Redo last undone action. (4)** (see [Undo and Redo Actions](#) <sup>53</sup>)
- **Outdent task or Indent task (5):** Move task to another level.
- **Show all subtasks (6):** All subtasks are displayed in the tabular and graphical view.
- **Hide all subtasks (7):** All subtasks are hidden. Only the summary tasks and milestones are displayed in the tabular and graphical view.
- **Zoom out and Zoom in (8):** Zoom in or zoom out view in Gantt Chart
- **Zoom to fit full Gantt (9):** The entire project is displayed in the Gantt chart.
- **Scroll left and Scroll right (10):** Jump in the Gantt chart to the start or end of the project.
- **Scroll to selected task (11):** Selected task line is displayed.
- **Features (12):** Drop-down menu with features.
  - Click on the arrow. ► A drop-down menu opens.

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

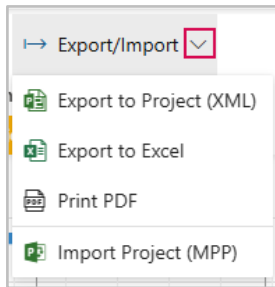


- **Baseline (13):** Display baseline or save the current status as a baseline.
- Click on the arrow. ► A drop-down menu opens.



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

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



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

### 5.1.2 Scheduler - Table

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

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

The columns can be moved using drag & drop.

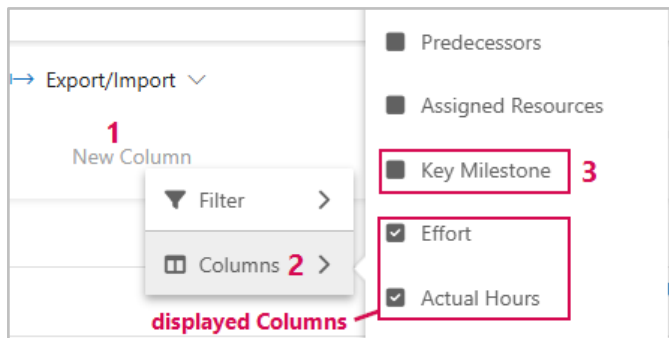
- 
- A list of available columns can be found under **Task Attributes** .
- 

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

#### Display multiple columns:

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

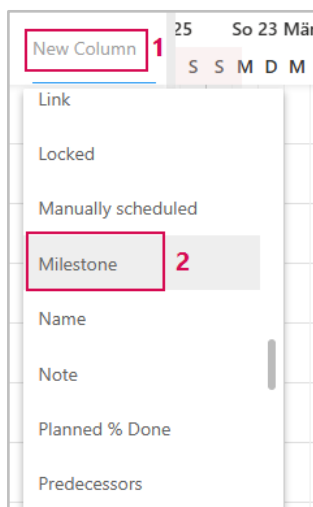
- Columns are displayed in the table.



Or

#### Selection via drop-down menu:

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



Or

#### Enter in text field:

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

- *Milestone* column appears in the table.

|           |    |           |
|-----------|----|-----------|
| Mi        | 25 | So 23 Mär |
|           | S  | S M D M   |
| Milestone |    |           |

- 
- 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.

| Predecessors        | Assigned Resc |
|---------------------|---------------|
| ▼ Filter            | >             |
| Columns             | >             |
| 1 Hide column       |               |
| ↑ Sort ascending    |               |
| 3 ↓ Sort descending |               |
| 4 Multi sort        | >             |

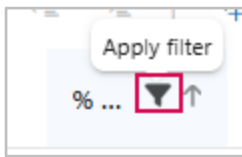
- 
- Columns that you hide may no longer be displayed in the drop-down menu if you want to show them again. Reload the project. The column will then be displayed in the drop-down menu again.
- 

### Apply a filter:

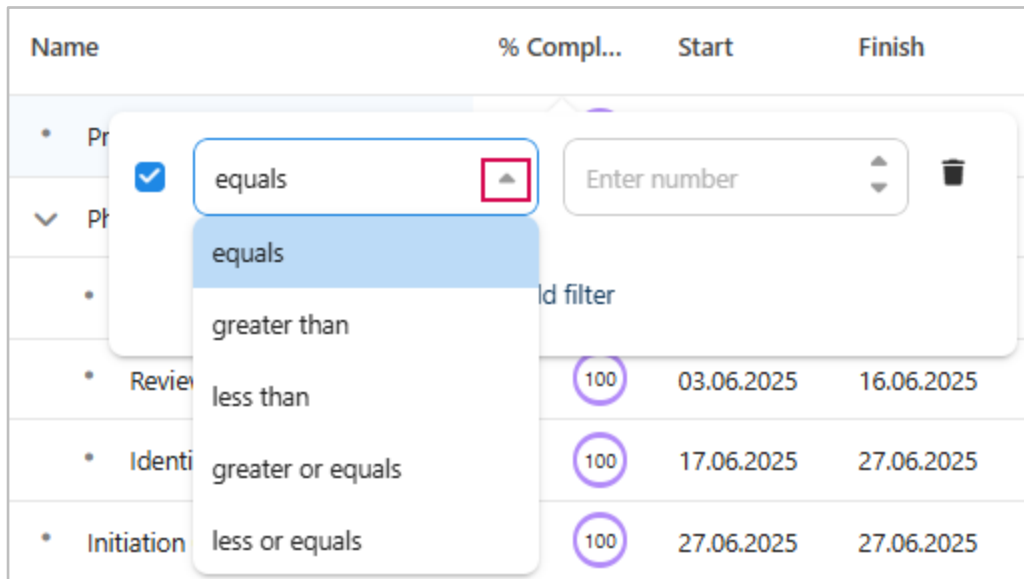
You can use filters to limit the tasks displayed in the Gantt chart.

To apply a filter:

- Click the filter icon in the desired column.



- Select a filter criterion from the drop-down menu.

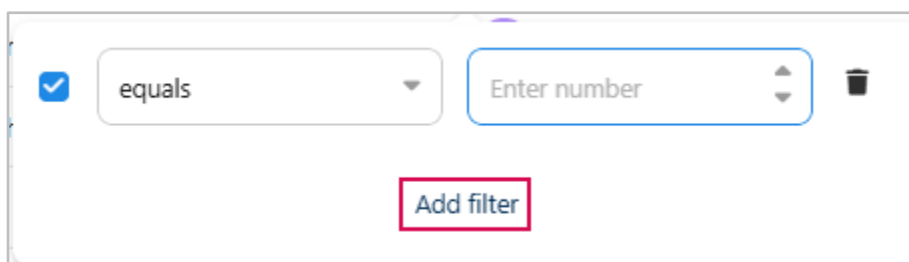


- Enter a search value.

- ▶ Only the entries that match the filter criteria are displayed.

You can use multiple filters at the same time to further narrow down the display:

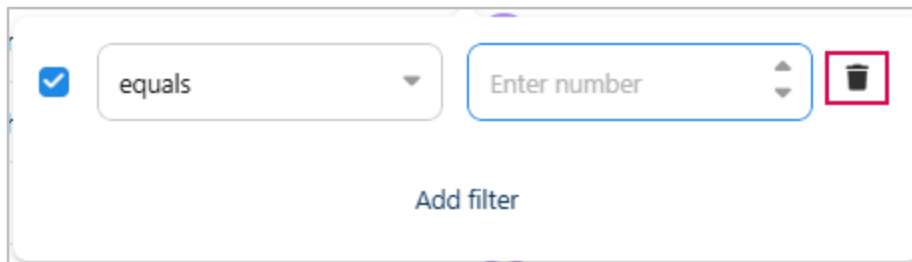
- Click *Add filter*.



To remove the filter:

- Click the filter icon in the desired column.

➤ Click the Remove icon.



▶ The filter is removed, and all transactions are displayed in the table.

▶ Filters only affect how transactions are displayed. The underlying data is not changed.

### 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.



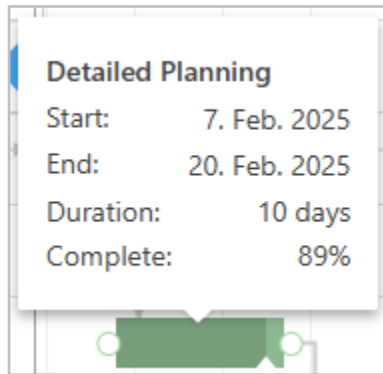
▶ The project tasks are placed one below the other on the timeline. (see [Scheduler - Views](#) <sup>38</sup>)

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](#))

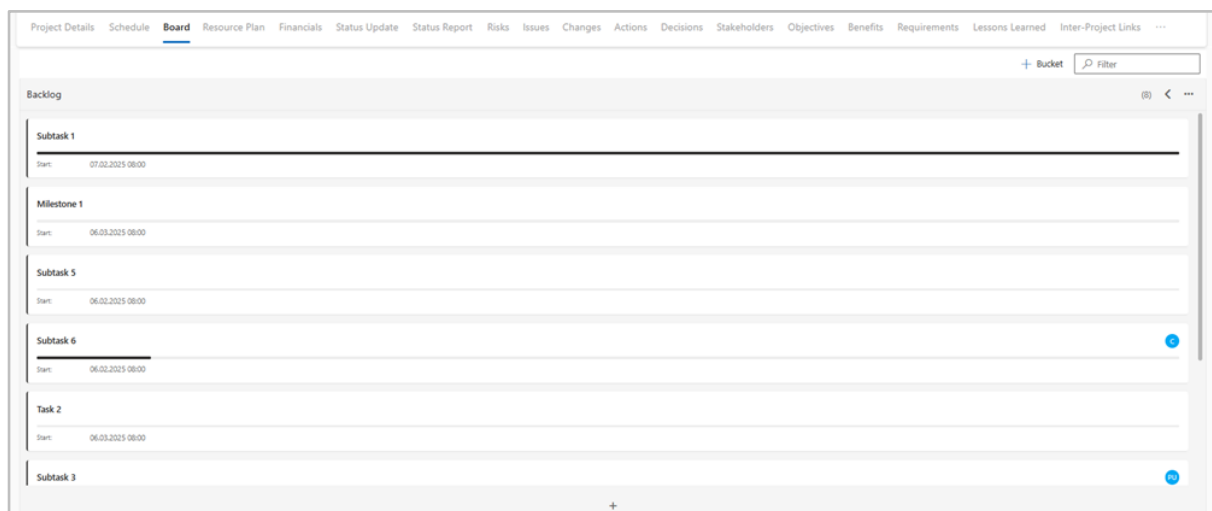
Move the mouse pointer over an operation to obtain information about it:



### 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.

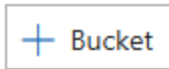
By default, all tasks are in the bucket *Backlog*. You can add further buckets and move tasks into buckets.



#### 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](#) <sup>172</sup>.

### Show bucket in the schedule:

You can show the *Bucket* column in the *Schedule* (see [Task Attributes](#) <sup>63</sup>). The bucket to which the task is assigned is displayed there. You can select a different bucket and assign the task to a different bucket.

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

## 5.2 Create Task

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

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

### Create new task:

- Click on the *Add* button. (1) ➤ A new task is created.

- Enter the task name (2) and confirm with the Enter button.

| # | i | Name   | % Complete | Start      |
|---|---|--------|------------|------------|
| 1 |   | Task 1 | 0          | 06.02.2025 |

#### Insert task on the same level:

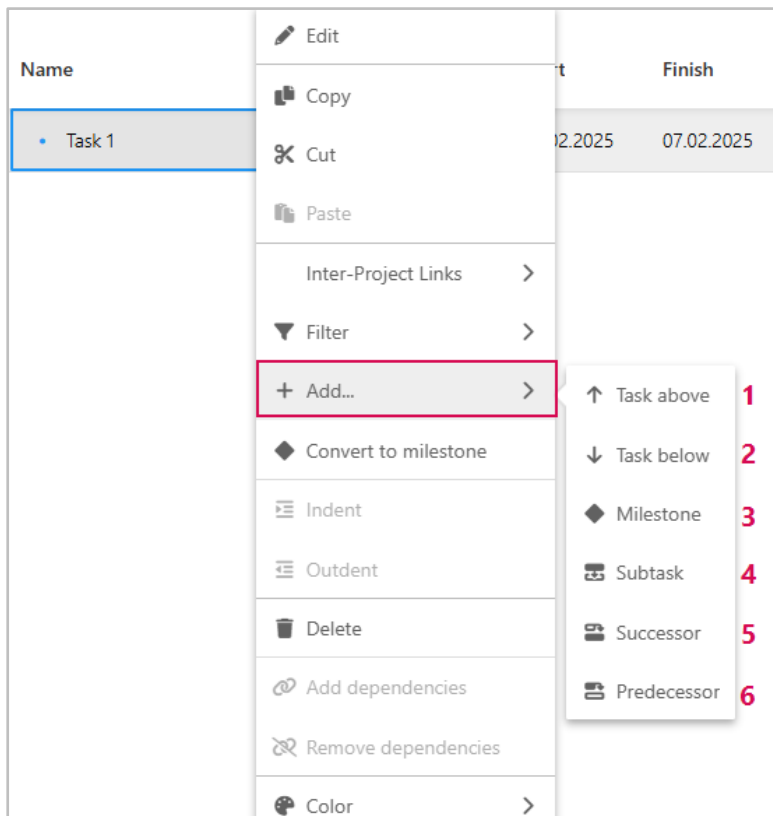
Repeat the process described above to create a task on the same level.

- 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.



### Copying, Cutting, and Pasting Cell Values:

The Scheduler supports copying, cutting, and pasting cell values. You can work with individual cells or multiple selected cells at the same time:

- Click the cell whose contents you want to copy.
- Click the fill handle (the blue square in the lower-right corner of the selected cell) and, while holding down the mouse button, drag it over the cells into which you want to copy the value.

| Duration | Prede |
|----------|-------|
| 0 days   |       |
| 20 days  | 1     |
| 1 day    |       |
| 10 days  | 3     |
| 9 days   | 4     |

- Release the mouse button to copy the contents of the selected cell into the highlighted cells.

In addition, you can also copy and paste entire rows:

- Click at the beginning of the row to select the desired row. (1) ► The selected row is highlighted in blue.
- Right-click the selected row to open the drop-down menu.
- Click *Copy*. (2) ► The row is copied to the clipboard.
- Navigate to the desired location in the schedule and right-click to open the drop-down menu.
- Click *Paste*. (3) ► The copied row is pasted at the selected location.

| #   | i | Name                     | % Compl... | Start |
|-----|---|--------------------------|------------|-------|
| 1   |   | • Project Start          |            |       |
| 2   |   | ▼ Phase 1: Initiation    |            |       |
| 1 3 | • | • Create Project Request |            |       |
| 4   | • | • Review Project Request |            |       |

Edit  
Copy 2  
Cut  
Paste 3

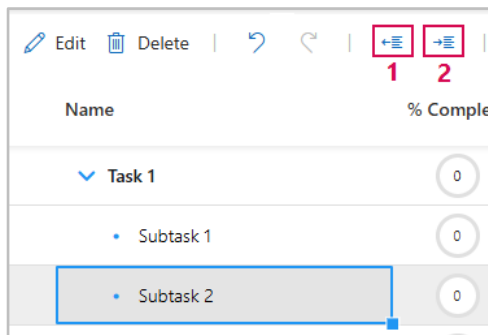
## 5.3 Move Task

- ▶ 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

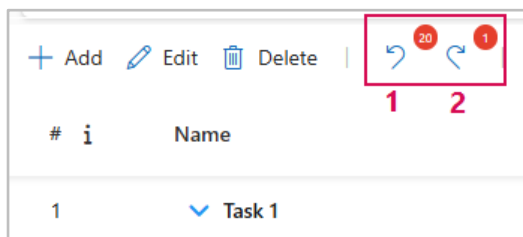
Last actions can be undone and redone using the buttons with the curved arrows.

### 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](#) <sup>56</sup>).

► 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.

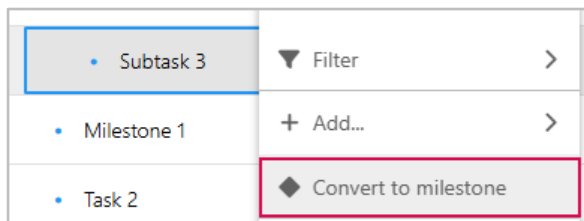
---

## 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.

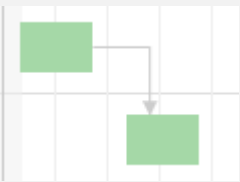
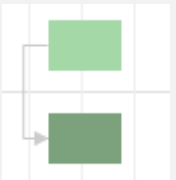
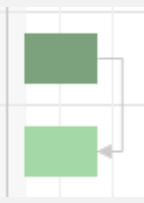
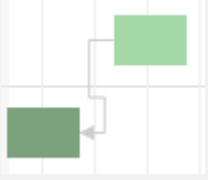


3. Show the *Milestone* column (see [Schedule - Table 42](#)) and activate the checkbox.

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

## 5.7 Define dependencies between Tasks

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

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

### 5.7.1 Define dependencies between Tasks - Table

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

#### FS relationship:

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

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

2

Filter

Subtask 5 (6) ☐

Subtask 6 (7) ☐

Subtask 1 (2) ☒

Subtask 4 (5) ☐

Or

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

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

### Define SS, FF and SF relationship:

To define the other dependencies, proceed as follows:

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

| # | i | Name        | Start      | Finish     | Predecessors | 2 Feb 2025 | So 09 Feb 2025 |
|---|---|-------------|------------|------------|--------------|------------|----------------|
| 1 | ▼ | Task 1      | 06.02.2025 | 26.02.2025 |              | M          | M D M D F      |
| 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          |            |                |

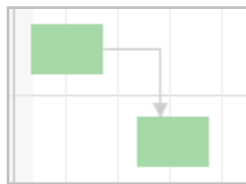
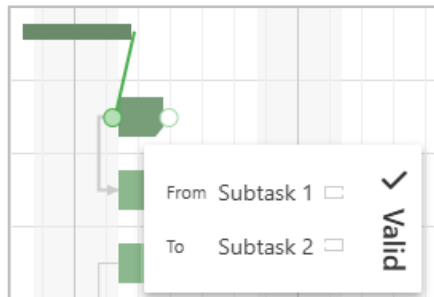
- 
- ▶ Alternatively, you can show the *Successor* column and define the subsequent task as described above.
- 

## 5.7.2 Define dependencies between Tasks - Gantt Chart

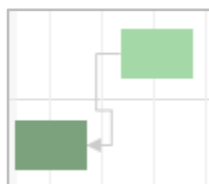
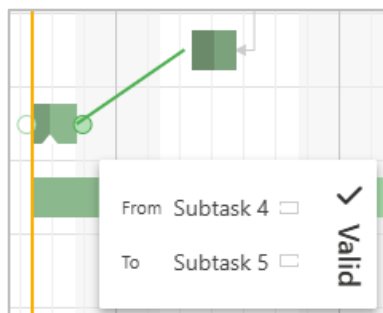
You can define dependencies between tasks in the Gantt chart view.

- 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.

The screenshot shows the 'Information' window with the 'PREDECESSORS' tab selected. The table lists 'Subtask 1 (2)' with a 'Finish-to-Start' dependency type, a lag of '0 days', and it is active. A dropdown menu for the 'Type' field is open, showing 'Finish-to-Start' as the selected option. The 'Lag' field is set to '0 days'. The 'Save' button is highlighted at the bottom.

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

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

**Edit dependency** X

**From**  
Subtask 1

**To**  
Subtask 2

**Type**  
End to Start 1

**Lag**  
0 days 2

**Active** ☒ 3

Save Delete Cancel

## 5.7.4 Deactivate dependencies between Tasks

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

- Open the information window of one of the two tasks. (see [Define dependencies between operations - Information Window](#) <sup>60</sup>)
- 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)

Information

GENERAL **PREDECESSORS** SUCCESSORS RESOURCES ADVANCED

| Name          | Type            | Lag    | Active                   |
|---------------|-----------------|--------|--------------------------|
| Subtask 1 (2) | Finish-to-Start | 0 days | <input type="checkbox"/> |

+

2 **Save** Delete Cancel

Edit dependency

From  
Subtask 1

To  
Subtask 2

Type  
End to Start

Lag  
0 days

Active ☐

**Save** Delete Cancel

## 5.8 Task Attributes

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

The following columns are displayed by default after project creation:

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

- **#** (number of the task line): Unique number assigned to each task in the project plan.
- **i** : Information on the task in the form of symbols, e.g. Assigned Resources  or Key Milestone Customer 
- **Name**: Name of the task.
- **%Complete**: Progress of the task. Percentage of how much of the task has already been completed . (see [Progress Indicator](#) )
- **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](#) )
- **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](#) )
- **Key Milestone**: Important event or goal in the project.
- **Effort**: Estimated amount of work required for the task. Specified in hours.
- **Actual Hours**: Actual hours worked to complete the task.
- **Actions**: Actions that must be completed during the execution of the task. (see [Actions](#))

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

Further columns or task attributes:

| Columns                  | Description                                                                                                                                                                                        |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Start Variance</i>    | <p>Difference between the planned and the actual start date of the task.</p> <p>Positive variance = task starts later than planned</p> <p>Negative variance = task starts earlier than planned</p> |
| <i>Finish Variance</i>   | <p>Difference between the planned and the actual end date of the task.</p> <p>Positive variance = task ends later than planned</p> <p>Negative variance = task ends earlier than planned</p>       |
| <i>Bucket</i>            | <p>Group in which tasks can be collected and organized on the <i>Board</i> Tab. (see <a href="#">Board Tab</a> <sup>47</sup>)</p>                                                                  |
| <i>Duration Variance</i> | <p>Difference between the planned and actual duration of a task.</p> <p>Positive variance = actual duration is longer than planned duration</p>                                                    |

| Columns                  | Description                                                                                                                                                                                                |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | Negative variance = actual duration is shorter than planned duration                                                                                                                                       |
| <i>Effort Unit</i>       | Unit in which the effort for the task is specified e.g. hour.                                                                                                                                              |
| <i>Constraint Type</i>   | Assign a constraint to the task:<br><br><i>As soon as possible, As late as possible, Must start on, Must finish on, Start no earlier than, Start no later than, End no earlier than, End no later than</i> |
| <i>Constraint Date</i>   | Assign the date (day) for the constraint type to the task.                                                                                                                                                 |
| <i>Color</i>             | Color of the task bar                                                                                                                                                                                      |
| <i>Early Start</i>       | The earliest date on which a task is allowed to start.                                                                                                                                                     |
| <i>Early End</i>         | The earliest date on which a task is allowed to finish.                                                                                                                                                    |
| <i>Baseline Duration</i> | Planned total time required to complete the task, specified in days.                                                                                                                                       |
| <i>Baseline Start</i>    | Scheduled time at which the task starts.                                                                                                                                                                   |
| <i>Baseline Finish</i>   | Scheduled time at which the task ends.                                                                                                                                                                     |
| <i>Total Slack</i>       | Total period provided as a buffer.                                                                                                                                                                         |
| <i>Locked</i>            | Task cannot be edited or moved.                                                                                                                                                                            |
| <i>Inactive</i>          | Task is deactivated (see <a href="#">Deactivate Task</a> <sup>78</sup> )                                                                                                                                   |
| <i>Calender</i>          | Assign task to a calendar. (see <a href="#">Set Calender for a Task</a> <sup>74</sup> )                                                                                                                    |
| <i>Link</i>              | Link between tasks or projects.<br><br><b>Hardlink</b> = 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.<br><b>Softlink</b> = A soft link is a flexible connection that refers to the path or position of another task or project. If the original task or project is changed or deleted, the soft link can become a broken link. |
| <i>Manually scheduled</i>       | Plan the task manually. The start date, finish date and duration are set by the project manager.                                                                                                                                                                                                                   |
| <i>Milestone</i>                | Event in the project e.g. completion of a project phase.                                                                                                                                                                                                                                                           |
| <i>Successor</i>                | Task that follows the current task. The cell contains the number of the operation line of the successor.                                                                                                                                                                                                           |
| <i>Note</i>                     | Comments on the task (see <a href="#">Add Note</a>  )                                                                                                                                                                          |
| <i>WBS</i>                      | Work Breakdown Structure, hierarchical representation of all content levels of a project.                                                                                                                                                                                                                          |
| <i>Scheduling Mode</i>          | Mode for scheduling tasks within a project. There are three scheduling modes: <i>Fixed Duration</i> , <i>Fixed Effort</i> , <i>Fixed Units</i> . (see <a href="#">Define Scheduling Mode</a>  )                                 |
| <i>Scheduling Direction</i>     | Method used to structure the scheduling of a project: <i>Forward</i> or <i>Backward</i>                                                                                                                                                                                                                            |
| <i>Priority</i>                 | Importance and urgency of a task: <i>Urgent</i> , <i>High</i> , <i>Medium</i> , <i>Low</i>                                                                                                                                                                                                                         |
| <i>Ignore Resource Calendar</i> | The calendar of the assigned resource is not considered when scheduling a task.                                                                                                                                                                                                                                    |
| <i>Rollup</i>                   | Display subtasks and milestones in the Gantt chart directly under the bar of the higher-level summary task. (see <a href="#">Create Rollup</a>  )                                                                             |
| <i>Sequence</i>                 | The order in which tasks are performed.                                                                                                                                                                                                                                                                            |
| <i>Deadline</i>                 | Time (date) by which the task/milestone must be completed.                                                                                                                                                                                                                                                         |
| <i>Late Start</i>               | Latest time (date) at which a task may start.                                                                                                                                                                                                                                                                      |

| Columns                 | Description                                                                                                                                                |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Late End</i>         | Latest time (date) at which a task may end.                                                                                                                |
| <i>Todos</i>            | Jobs that need to be completed within the task.                                                                                                            |
| <i>Show in timeline</i> | The task is displayed in the timeline above the table and the Gantt chart. Timeline must be shown. (see <a href="#">Schedule - Buttons</a> <sup>40</sup> ) |

► 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](#) <sup>42</sup>)
- Fill in the cells as described in the following chapters.

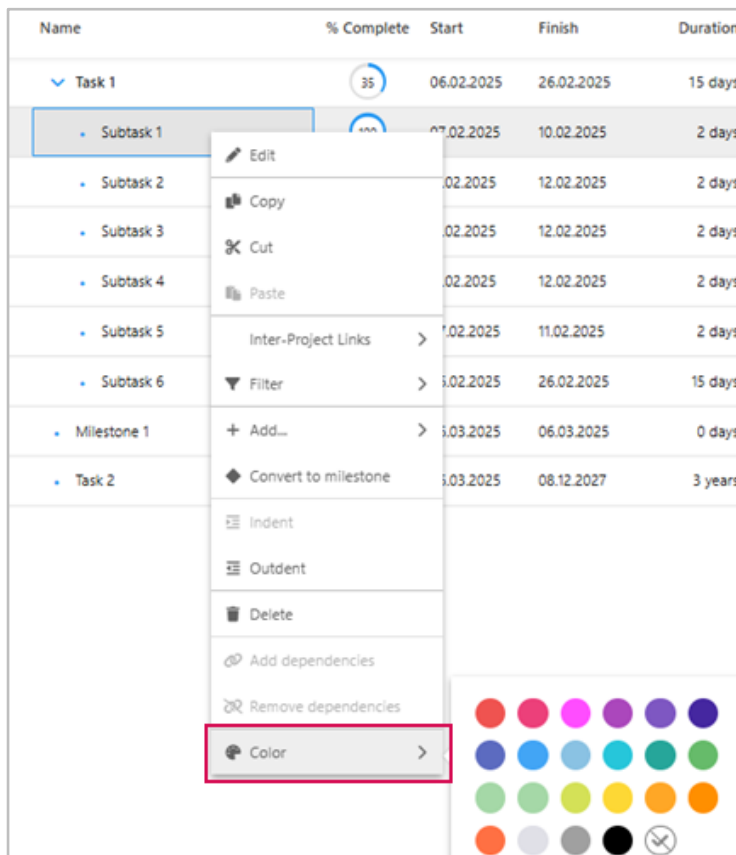
## 5.8.1 Change color of Task bar

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.

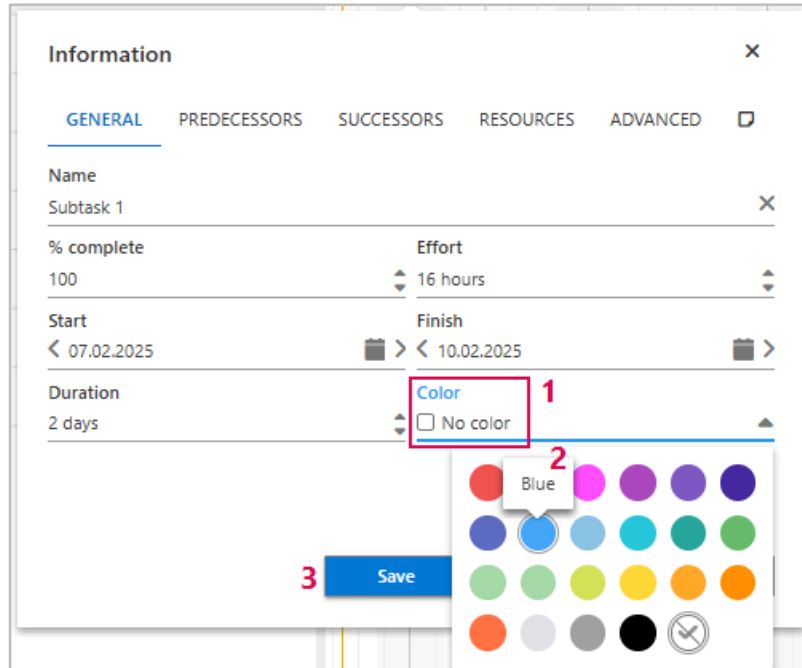
Or

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

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

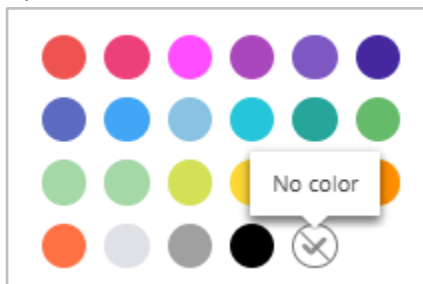
➤ Click on the desired color in the color palette. (2)

➤ 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](#) <sup>42</sup>)
- 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 ...   | Number of Assigned Resources  | Duration       | Effort         |
|-----------------|-------------------------------|----------------|----------------|
| Scheduling Mode | leads to the recalculation of |                |                |
| Fixed Duration  | Effort                        | Effort         | Units <b>1</b> |
| Fixed Units     | Effort <b>2</b>               | Effort         | Duration       |
| Fixed Effort    | Duration                      | Units <b>3</b> | Duration       |

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

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

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

| Duration        | Assigned Resources | Scheduling...  | Effort    |
|-----------------|--------------------|----------------|-----------|
| 10 days         |                    | Fixed Duration | 236 hours |
| 2               | Developer 50%      | Fixed Duration | 16 hours  |
| <b>1</b> 5 days | D                  | Fixed Duration | 20 hours  |
| 7 days          | C                  | Fixed Effort   | 56 hours  |
| <b>2</b> 5 days | C D                | Fixed Units    | 80 hours  |

|                  |                |                |          |
|------------------|----------------|----------------|----------|
| 2                | Consultant 70% | Fixed Duration | 8 hours  |
| <b>3</b> 10 days | C              | Fixed Effort   | 56 hours |

#### Edit variables in the Task information window:

- Open the information window. (see [Define dependencies between Tasks - Information window](#))

The following tabs are available in the Task information window:

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

Task information
×

General
Predecessors
Successors
Resources
Advanced

Name
Financing
×

% complete
45

Effort
40 hours

Dates

Start
< 24.11.2025

Finish
< 28.11.2025

Duration
5 days

Color
Light-green

Save
Cancel

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

Task information

×

General

Predecessors

Successors

Resources

Advanced

|       |                     |        |                |          |       |     |
|-------|---------------------|--------|----------------|----------|-------|-----|
|       | Resource            |        |                |          | Units |     |
| ▼     | PPP Project Manager |        |                |          | 100%  |     |
| Start | ↑ <sub>1</sub>      | Finish | ↑ <sub>2</sub> | Effort   | Units |     |
|       |                     |        |                | 40 hours | 100%  | + × |

+

Save

Cancel

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

Task information

General Predecessors Successors Resources **Advanced**

Calendar: Default calendar

**Scheduling mode: Fixed Duration**

Ignore resource calendar: ☐

Effort driven: ☐

Constraint

Constraint type: None

Constraint date:

Rollup: ☐

Inactive: ☐

Manually scheduled: ☐

Save Cancel

➤ 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](#)<sup>31</sup>)

Enterprise Project Type: Default Project Type

**Calendar: Default**

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

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

### Set task calendar for individual tasks in the schedule:

- Show the *Calendar* column. (see [Schedule - Table](#) <sup>42</sup>)
- In the task row, click on the cell in the *Calendar* column.
- Click on the arrow on the right in the cell. ► The drop-down menu opens.
- Click on the desired calendar.
- A task calendar for a single task is set.

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

### Set task calendar for individual tasks in the information window:

- Open the information window for the desired task. (see [Define dependencies between Tasks - Information window](#) <sup>60</sup>)
- Go to the *Advanced* tab.
- Click on the arrow on the right of the *Calendar* field. ► The drop-down menu opens.
- Click on the desired calendar.
- Click *Save*.
- A task calendar for a single task is set.

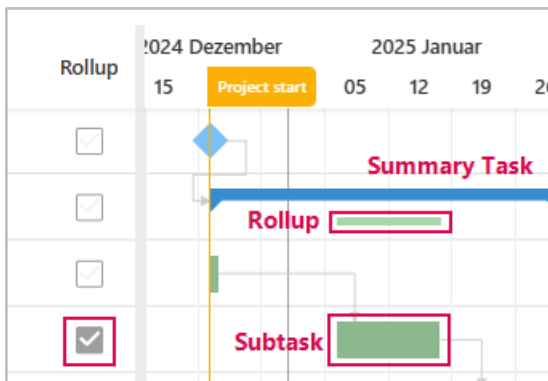
- ▶ If no calendar has been selected for a task, the calendar field in the task editor is blank by default. This makes it clear that no calendar is currently assigned.
- ▶ If a calendar is changed, the finish date of the task is adjusted. The nominal duration remains unchanged. The effort is calculated 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](#) <sup>42</sup>) ▶ Checkboxes appear in the task rows.
- Click on the checkbox of the subtask in the *Rollup* column.

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



Or

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

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

Task information

General

Predecessors

Successors

Resources

Advanced

Calendar

Scheduling mode

Constraint type

Constraint date

Ignore resource calendar

Effort driven

Rollup

Inactive

Manually scheduled

Save

Cancel

1

2

3

## 5.8.5 Deactivate Task

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

- Show the *Inactive* column. (see [Schedule - Table](#) <sup>42</sup>) Checkboxes appear in the task rows.
- Click on the checkbox of the task in the *Inactive* column.
- ▶ The task is crossed out in the table view and the task bar is colored gray in the Gantt chart.

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

Or

- Open the information window of the task. (see [Define dependencies between Tasks - Information Window](#) <sup>60</sup>)
- Click on the *Advanced* tab. (1)
- Click on the *Inactive* slider. (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.

Task information

General

Predecessors

Successors

Resources

Advanced

Calendar

Ignore resource calendar

Scheduling mode

Fixed Duration

Effort driven

Constraint

Constraint type

Start no earlier than

Rollup

Constraint date

07.02.2025

Inactive

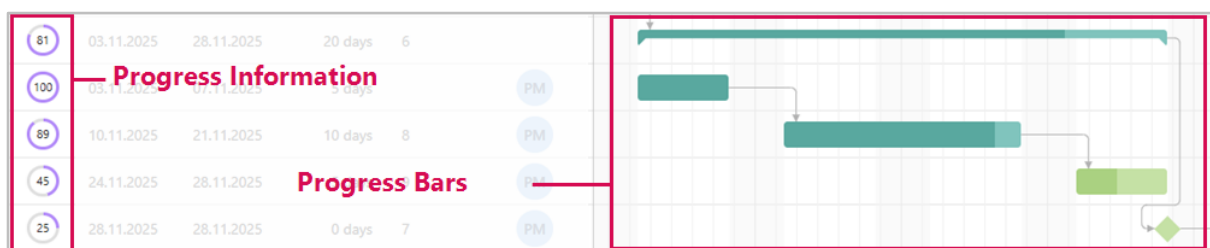
Manually scheduled

Save

Cancel

## 5.8.6 Progress Indicator

Project progress shows you how much of your tasks, group tasks, or the entire project has already been completed. It is automatically calculated based on the progress information for the individual tasks and displayed as a progress bar in the project plan.



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. The percentage entered is saved directly to the operation and serves as the basis for calculating the progress of higher-level collective operations.

- Select the task to which you want to assign a progress.
- Double-click the *%Complete* cell.

➤ Enter the progress percentage in the field:

- 0%: Process has not yet begun
- 1–99%: Process in progress
- 100%: Process completed

► The percentage of progress will be displayed. This value serves as the basis for the calculation and display in the project plan.

► The progress indicator in the project plan displays the entered or calculated percentage directly on the task. The indicator itself does not perform any additional calculations.

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

### Calculating Progress for Summary Tasks

For summary tasks, the percentage is calculated automatically. This involves aggregating the progress of the subordinate tasks - weighted by their duration. This means:

**Tasks with longer durations have a greater impact on the overall progress than tasks with shorter durations.**

Underlying formula (only active tasks with a duration are taken into account):

$$\text{Summary task progress} = \frac{\sum (\text{Progress of the task} \times \text{Duration of the task})}{\sum (\text{Duration of the considered tasks})}$$

### Example:

Summary task:

- Task A: Progress 50%, Duration 4 days ► Included in the calculation.
- Task B: Progress 100%, Duration 6 days ► Included in the calculation.
- Milestone C: Progress 100%, Duration 0 days ► Not included in the calculation (no duration).
- Task D (inactive): Progress 20%, Duration 5 days ► Not included in the calculation (inactive).

Calculation:

$(50\% \times 4 \text{ days} + 100\% \times 6 \text{ days}) \div (4 \text{ days} + 6 \text{ days}) = 80\%$ . ► The summary task is thus 80% complete.

### Deviations in Practice:

In real-world projects, the displayed result may vary slightly, e.g., due to:

- differing work calendars (e.g., weekends, holidays)
- internal calculations using hours or milliseconds
- rounding in the display

► Therefore, in practice, values such as 83% or similar may be displayed.

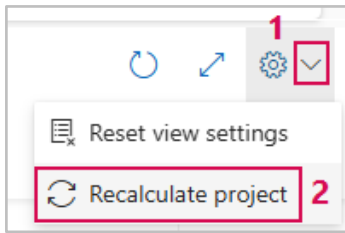
- 
- Only active tasks are included in the automatic calculation.
  - Inactive tasks are not included in the progress calculation.
  - Milestones have a duration of 0 days and therefore do not affect the calculation.
  - If there are multiple levels, progress is automatically calculated across all subordinate levels.
- 

### Recalculate total project progress:

Use this function when the progress values, duration, status, or activity of tasks have changed and you want to update the overall 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.



- ▶ The newly calculated project progress takes into account only active tasks with a duration. Inactive tasks and milestones without a duration do not affect the progress value.

### Visual Highlighting of Delayed Tasks and Milestones:

This feature allows you to highlight delayed tasks and milestones in the scheduler.

A task is considered delayed if:

- the scheduled end date is in the past,
- the task is not yet 100% complete,
- the task is active (not marked as inactive).

Delayed tasks are highlighted in color:

- in the table by a changed background color for the row,
- in the Gantt chart by a changed color for the task bar.

Delayed milestones are also highlighted in color.

- ▶ The administrator can enable or disable this feature in the scheduler settings.
- ▶ The highlight color is set by the administrator. A predefined color is set by default.

### 5.8.7 Add Note

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

- Show the *Note* column. (see [Schedule - Table](#) <sup>42</sup>)
- 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.

| Note               | Name     |
|--------------------|----------|
| Note on the Task ▼ | 1 Task 1 |
| Note on the Task   | • Sub    |
|                    | 2 • Sub  |
|                    | • Sub    |

Or

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

► The note is added.

The screenshot shows a 'Task information' dialog box with a close button (x) in the top right corner. Below the title bar, there are five tabs: 'General', 'Predecessors', 'Successors', 'Resources', and 'Advanced'. The 'Advanced' tab is selected and highlighted with a red box and a red number '1'. Below the tabs, there is a text area labeled 'Note on the Task' with a red number '2' next to it. At the bottom right of the dialog, there is a blue 'Save' button highlighted with a red box and a red number '3', and a 'Cancel' button next to it.

## 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.

---

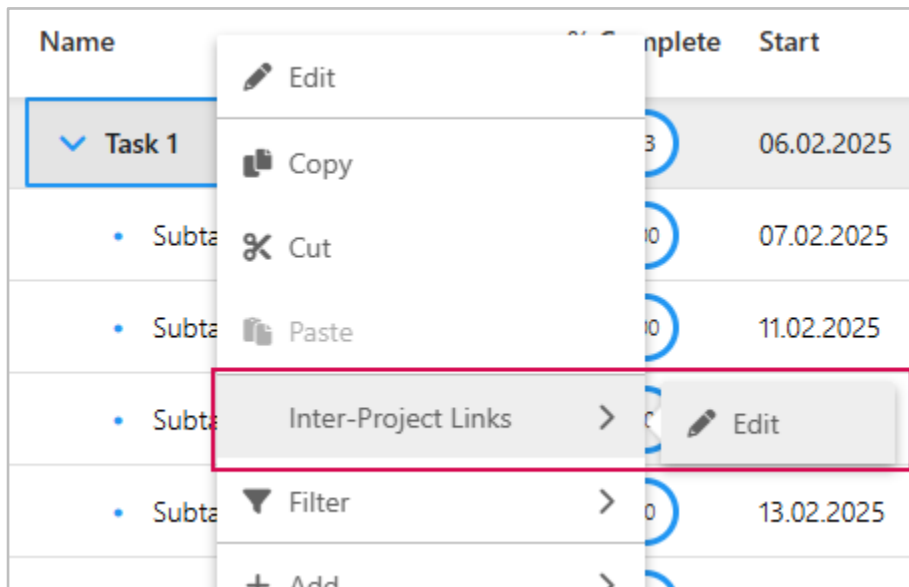
### 5.9.1 Create Inter-Project Links

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.

**Quick Create: Inter-Project Link**

Provider

Project \* [ ]

Task \* [ ]

Relevant Date \* [ ]

Consumer (This Project)

Project \* [Projekt.XY x]

Task \* [Task.1 x]

Relevant Date \* [ ]

General

Buffer Indicator \* [Green when provider is the earlier date]

Note [ ]

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

[Save and Close] [Cancel]

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

**Provider** = Project that provides information to the current project.

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

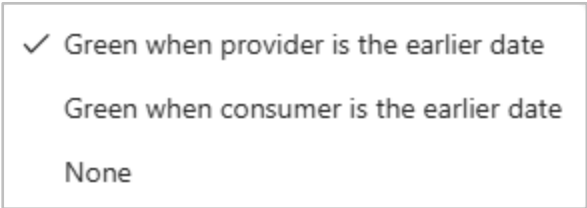
**Consumer** = Current project. Project that receives information from the provider project.

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

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

#### **General**

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



✓ Green when provider is the earlier date  
Green when consumer is the earlier date  
None

- 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.

Inter-Project Links

Project X

Provider

Task

Start

End

Duration

Buffer

Create Project Request

23. Dez. 2024

23. Dez. 2024

1 day

45 days

Buffer Indicator

Add

Cancel

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

## 5.9.2 Edit Inter-Project Links

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

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

| # | i                                                                                 | Name      |
|---|-----------------------------------------------------------------------------------|-----------|
| 1 |  | Task 1    |
| 2 |                                                                                   | Subtask 1 |

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

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

| Name      | Complete | Start      |
|-----------|----------|------------|
| Task 1    | 3        | 06.02.2025 |
| Subtask 1 | 10       | 07.02.2025 |
| Subtask 2 | 10       | 11.02.2025 |
| Subtask 3 | 0        | 13.02.2025 |

Edit

Copy

Cut

Paste

Inter-Project Links >

Filter >

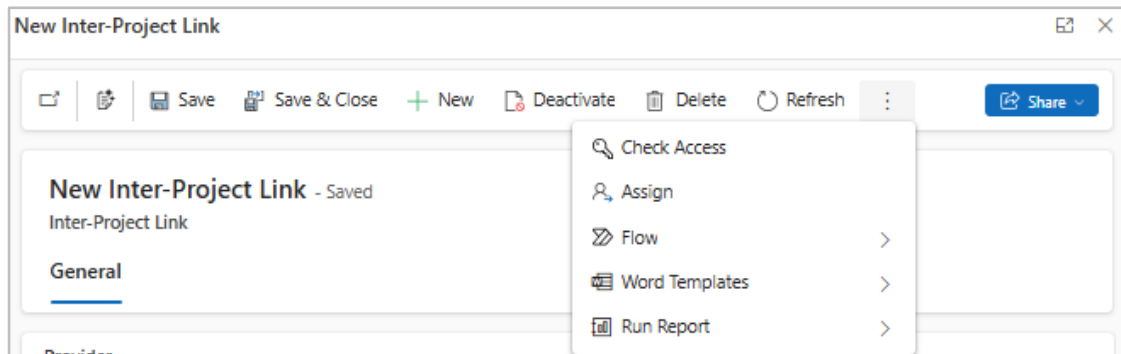
+ Add >

Edit

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



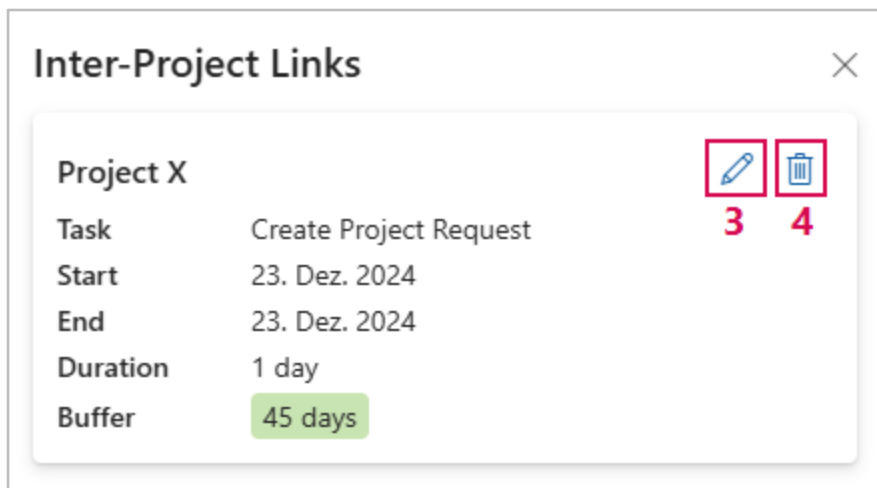
- The command bar of the form contains buttons to deactivate the links or share them with others.



- 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](#) <sup>40</sup>)
- Right-click on the task.

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

| # | i                                                                                 |                                                                                                                                                                | % Complete     | Start                             | Finish     |
|---|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-----------------------------------|------------|
| 1 |  | <div> <div>Edit</div> <div>Copy</div> <div>Cut</div> <div>Paste</div> <div>Inter-Project Links &gt;</div> <div>Filter &gt;</div> <div>Add... &gt;</div> </div> | <div>53</div>  | 06.02.2025                        | 19.02.2025 |
| 2 |                                                                                   |                                                                                                                                                                | <div>100</div> | 07.02.2025                        | 10.02.2025 |
| 3 |  |                                                                                                                                                                | <div>100</div> | 11.02.2025                        | 17.02.2025 |
| 4 |  | <div> <div>Edit</div> </div>                                                                                                                                   |                | 11.02.2025                        | 19.02.2025 |
| 5 |  | <div> <div>Scroll to &gt;</div> </div>                                                                                                                         |                | <div>Create Project Request</div> |            |

► The linked task is highlighted in the Gantt chart.

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

## 6 Resource Planning

You can plan resources in the TPG Scheduler.

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

- **Assign resources to tasks directly in the schedule.**  92

You can then transfer the data to the resource plan to check resource availability.

- **Assemble the project team manually on the *Project Team* tab.**  96

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.**  98

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**  98: monthly view for a single year.
- **Multi-year view:**  109 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.

| Duration | Assigned Resources                                                                                                                                                    | Scheduling Mo...                                 | Eff                                                                                                              | 30 02 18 |   |   |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------|----------|---|---|
|          |                                                                                                                                                                       |                                                  | S                                                                                                                | M        | D | M |
| 5 days   | <input type="checkbox"/>                                                                                                                                              | Find resource <span style="color: red;">2</span> | Units                                                                                                            | Effort   |   |   |
| 1 day    |                                                                                                                                                                       |                                                  |                                                                                                                  |          |   |   |
| 10 days  | ▼ Consulting <span style="background-color: #e0e0e0;">2</span>                                                                                                        |                                                  |                                                                                                                  |          |   |   |
| 0 days   | <input checked="" type="checkbox"/> <span style="color: red;">3</span> <span style="background-color: #add8e6; border-radius: 50%; padding: 2px;">C</span> Consultant | <span style="color: red;">4</span>               | 70%                                                                                                              | 56       |   |   |
| 9 days   | <input type="checkbox"/> <span style="background-color: #add8e6; border-radius: 50%; padding: 2px;">PU</span> PPP Project User                                        |                                                  |                                                                                                                  | 8        |   |   |
| 10 days  | ▼ Development <span style="background-color: #e0e0e0;">2</span>                                                                                                       |                                                  |                                                                                                                  |          |   |   |
| 5 days   | <input type="checkbox"/> <span style="background-color: #add8e6; border-radius: 50%; padding: 2px;">D</span> Developer                                                |                                                  |                                                                                                                  | 8        |   |   |
| 7 days   | <input type="checkbox"/> <span style="background-color: #add8e6; border-radius: 50%; padding: 2px;">PM</span> PPP Project Manager                                     |                                                  |                                                                                                                  | 8        |   |   |
| 5 days   |                                                                                                                                                                       |                                                  |                                                                                                                  |          |   |   |
| 5 days   |                                                                                                                                                                       | <span style="color: red;">5</span>               | <span style="background-color: #007bff; color: white; padding: 5px 10px; border: 1px solid #007bff;">Save</span> | Cancel   |   |   |
| 10 days  | <span style="background-color: #add8e6; border-radius: 15px; padding: 2px 5px;">Consultant 70% X</span> <span style="color: red;">1</span> ↑                          | Fixed Effort                                     | 56 ho                                                                                                            |          |   |   |

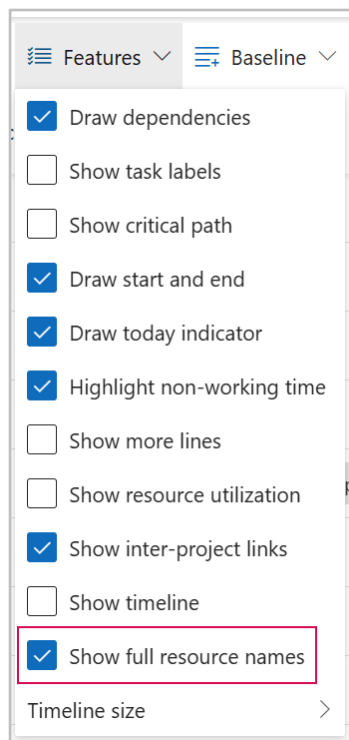
- 
- The effects of changes to units and efforts are described under [Define Scheduling Mode](#) 
- 

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.

| Duration | Predecessors | Assigned Resources     |
|----------|--------------|------------------------|
| 20 days  |              |                        |
| 2 days   |              | Developer 63% PPP Pr   |
| 5 days   | 2            | Developer 50%          |
| 0 days   | 3SS          | PPP Project Manager 0% |
| 5 days   | 4FF          | Consultant 100% Deve   |
| 1 day    | 5            | Consultant 100%        |

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.

| # | i | Name          | % Compl... | Start      | Finish     | Duration | Prec |
|---|---|---------------|------------|------------|------------|----------|------|
| 1 |   | Vorgang 1     | 49         | 03.11.2025 | 28.11.2025 | 20 days  |      |
| 2 |   | Teilvorgang 1 | 100        | 03.11.2025 | 04.11.2025 | 2 days   |      |
| 3 |   | Teilvorgang 2 | 100        | 05.11.2025 | 11.11.2025 | 5 days   | 2    |
| 4 |   | Teilvorgang 3 | 70         | 05.11.2025 | 05.11.2025 | 0 days   | 3SS  |
| 5 |   | Teilvorgang 4 | 50         | 03.11.2025 | 07.11.2025 | 5 days   | 4FF  |
| 6 |   | Teilvorgang 5 | 20         | 10.11.2025 | 10.11.2025 | 1 day    | 5    |
| 7 |   | Teilvorgang 6 | 10         | 17.11.2025 | 28.11.2025 | 10 days  |      |

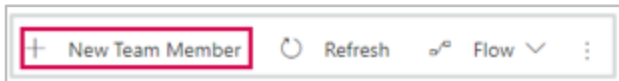
  

| Resource / Task          | ↑ | Start      | Finish     | Units |
|--------------------------|---|------------|------------|-------|
| > C Consultant           |   | 03.11.2025 | 09.12.2025 | 100%  |
| > D Developer            |   | 03.11.2025 | 02.12.2025 | 100%  |
| > PM PPP Project Manager |   | 06.02.2025 | 28.11.2025 | 100%  |

## 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 Enterprise is preset. I.e. a member of your organization that is listed under Resources.

- Click in the *Resource* field.

 A screenshot of a dialog box titled 'Quick Create: Team Member'. It contains three fields: 'Resource Type' with a dropdown menu showing 'Enterprise', 'Resource' with a text input field containing 'Look for Resource' and a magnifying glass icon, and 'Project' with a dropdown menu showing 'Project B'. The 'Resource' field is highlighted with a red rectangular box.

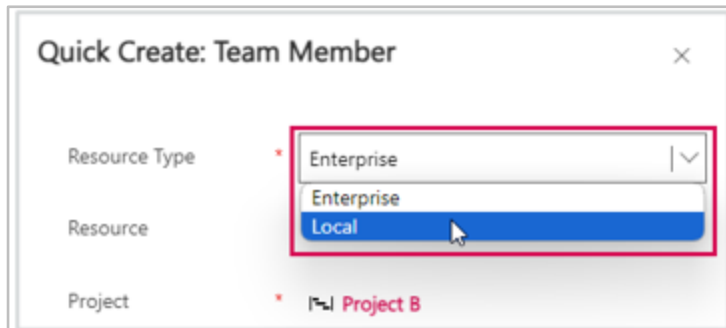
- Search for the desired person.
- Add further team members: Click on the arrow next to the Save button and select *Save & Create New*.



- 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.



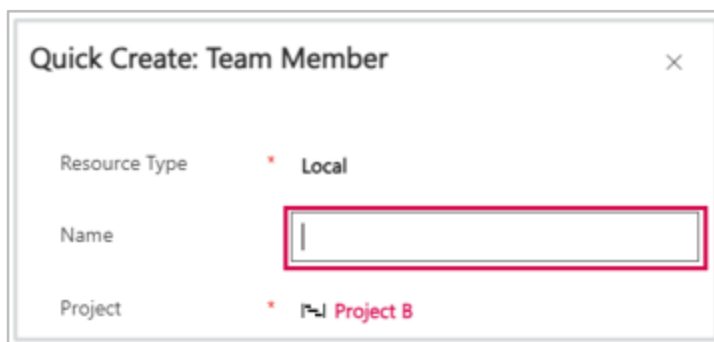
Quick Create: Team Member

Resource Type \* Enterprise

Resource

Project \* Project B

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



Quick Create: Team Member

Resource Type \* Local

Name

Project \* Project B

- 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.

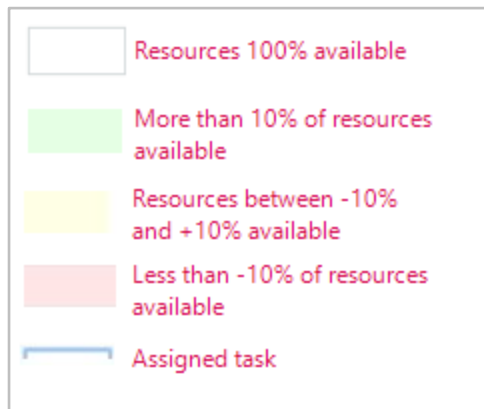
- 
- ▶ The resource planning steps described in this section apply to both views.
  - ▶ For clarity, the steps are shown using the default view.
  - ▶ The use of the Multi-year view is described in the section [Use Multi-year view in Resource Plan](#)  109.
  - ▶ By default, planning is at monthly level. Other time units can be configured.
- 

### Add Resources and enter work values:

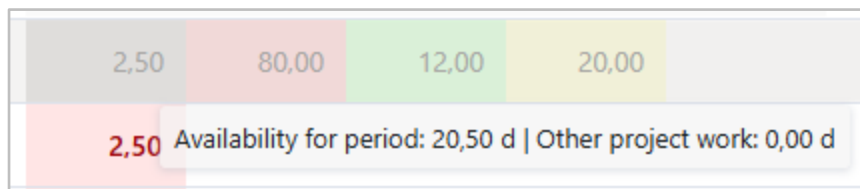
- Click *Sync* (1) to transfer already assigned resources to the resource plan. ▶ The *Synchronize rows* dialog box opens.
- Click on the *Overwrite existing* checkbox.
- Click on the *Include work values* checkbox if you also want to apply the work values of the resource.



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.

► Resources that are not assigned to a department are not displayed with an availability indicator in the heat map. Instead, the message “Availability for period: NA” appears.

### 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)

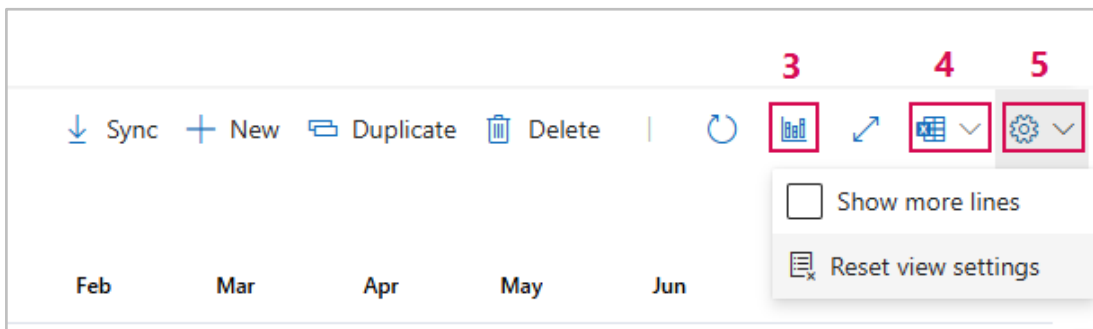
The screenshot shows the TPG Scheduler interface. At the top, there are navigation tabs for years (2025, 2026, 2027, 2028) and a 'Compare' dropdown. On the right, there are buttons for 'Sync', 'New', 'Duplicate', and 'Delete'. The 'Duplicate' button is highlighted with a red box and a red number '2'. Below this, there is a table with columns: Resource Department, Resource Name, Assignment, Comments, Total, Year, and a grid for months (Jan, Feb, Mar, Apr, May). The table has two rows. The first row is for 'Development (2)' with a total of 134.50 and values of 2.50, 80.00, 12.00, and 20.00. The second row is for 'Development' with a total of 114.50 and values of 2.50, 80.00, 12.00, and 20.00. A checkbox is checked in the first column of the second row, and it is highlighted with a red box and a red number '1'.

► 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.

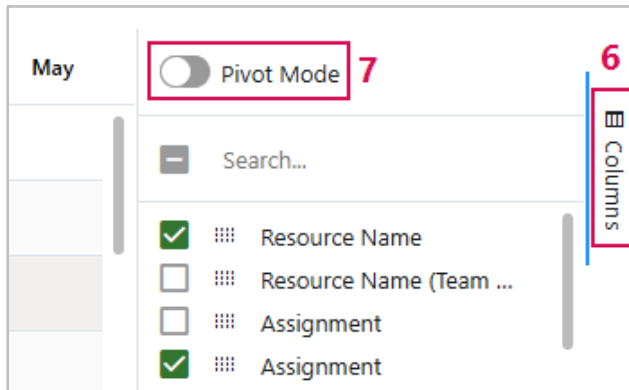
|                     |                     |   |
|---------------------|---------------------|---|
|                     | Resource Department | ✕ |
| Resource Department | Resource Name       |   |
| Development (2)     |                     |   |
| Development         | PPP Project Manager |   |
| Development         | Developer           |   |

- 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.



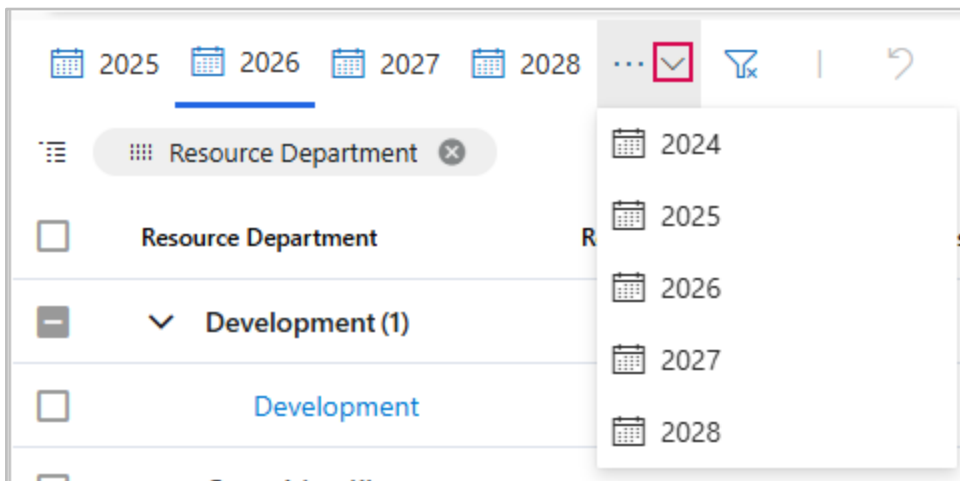
**Navigating between years:**

➤ 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 Automatically share a project with team members

When a project team member is added, the corresponding project is automatically shared with that person so that they can view and edit it in the Scheduler.

When a task is assigned to a person, they automatically receive write access to that item so they can edit and update it.

### Sharing Mechanisms

PPP uses two different mechanisms for automatic sharing:

#### 1. Project Approval via Access Teams

##### Process:

1. A project team member is added (see [Project Team Tab - Assembly project team manually](#) ), modified, or removed.
2. The system identifies the associated project and searches for an access team named “Team Member [Project Name].” If no such team exists, it is automatically created.
3. The access team is assigned the following permissions for the project:
  - Read
  - Append
  - Append To
4. Next, all project team members with the “Contribute” permission (not “None”) are identified and synchronized with the access team:
  - New members are added.
  - Removed members are removed.

- Members with the “None” permission are also removed.

**Developer** - Saved  
Team Member

**General**

Resource Type \* Enterprise

Resource Developer

Standard Rate 110,00 €

Max Units

Permission Contributed

--Select--  
✓ Contributed  
None

► The access team functions as a dynamic, automatically synchronized user group. All users included in it inherit the defined project permissions.

## 2. Approval of Actions (Direct User Approval)

### Process:

1. When an action is created, the user specified in the “Assigned to” field (see [Edit Actions](#)<sup>178</sup>) is automatically granted write access.
2. If the task is assigned to another person, the new assignee receives the following permissions:

- Read
- Write
- Attach
- Append to

Access is revoked from the previously assigned user (unless they are the owner of the record; owners always retain access).

3. No access team is used for tasks; access is granted directly to the respective user.

**Summary:**

- Access is granted automatically whenever a task is created, modified, or deleted.
- Access management is handled dynamically and without manual intervention.
- Permissions can be controlled at the level of individual team members (e.g., via “Contribute” or “None”).
- The approval of tasks is handled by a separate mechanism.

---

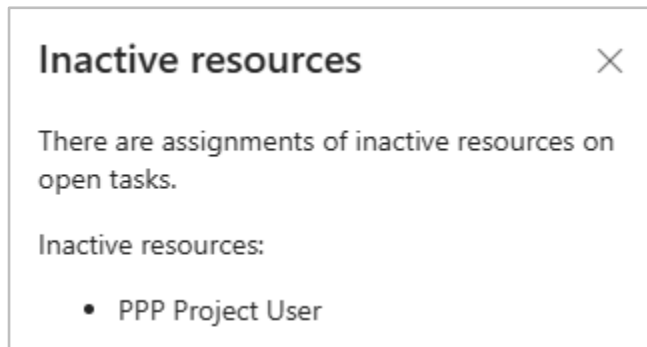
► Existing Data: Existing entries are automatically set to the “Contribute” permission during the next deployment. Manual adjustment is not required.

► Tasks: Assigned users can edit their tasks without additional approvals. Upon reassignment, access rights are automatically transferred.

---

## 6.5 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.

A screenshot of the "Find resource" dialog box. It has a search bar at the top. Below, there are two sections: "Consulting (2)" and "Development (2)". In the "Consulting (2)" section, the resource "PPP Project User" is selected with a checkmark and has a 100% unit assignment. The resource "Consultant" is also listed. In the "Development (2)" section, "Developer" and "PPP Project Manager" are listed. At the bottom, there are "Save" and "Cancel" buttons. The project name "PPP Project" is shown at the bottom left.

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

## 6.6 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.

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

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

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

### Color Scheme of Resource Availability:

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

The following color scheme applies:

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

The Mouseover shows the availability as a percentage:



## 6.7 Use Multi-year view in Resource Plan

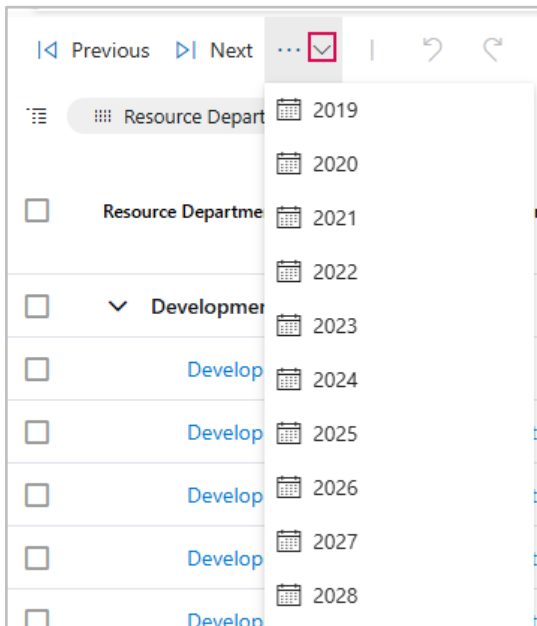
The Multi-year view in the resource plan displays all resource lines over several years. This makes resource planning beyond the turn of the year easier to recognize.

|                                                                                                                                                                       |                     |                     |                       |          |       |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------------------|-----------------------|----------|-------|
| <div> <div>Previous</div> <div>Next</div> <div>...</div> <div>Compare</div> </div> <div> <div>Sync</div> <div>New</div> <div>Duplicate</div> <div>Delete</div> </div> |                     |                     |                       |          |       |
| Resource Department                                                                                                                                                   |                     |                     |                       |          |       |
| <input type="checkbox"/>                                                                                                                                              | Resource Department | Resource Name       | Assignment            | Comments | Total |
| <input type="checkbox"/>                                                                                                                                              | Development (8)     |                     |                       |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | Developer           | Review Project Re...  |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Identify Risks        |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Planning Complet...   |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Preliminary Planni... |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Financing             |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Review Project Re...  |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Detailed Planning     |          | 0,00  |
| <input type="checkbox"/>                                                                                                                                              | Development         | PPP Project Manager | Create Project Re...  |          | 0,00  |
| Total sum of all years displayed                                                                                                                                      |                     |                     |                       |          | 64,00 |

- 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](#).

### 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.

| 2024 > | 2025 > | 2026 < |       |
|--------|--------|--------|-------|
| Total  | Total  | Jan    | Feb   |
|        | 44,21  | 30,50  | 12,00 |
|        | 5,26   | 4,00   | 4,00  |
|        | 10,53  | 7,75   | 1,00  |

### 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<br>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.

| Cost Type | Cost Category | Expense Type | Details | Y... | Total   | Jan    | Feb    | Mar | Apr | May | Jun |
|-----------|---------------|--------------|---------|------|---------|--------|--------|-----|-----|-----|-----|
| ▼ (3)     |               |              |         |      | 120.000 | 60.000 | 60.000 |     |     |     |     |
| ▼ (3)     |               |              |         |      | 120.000 | 60.000 | 60.000 |     |     |     |     |
|           |               |              |         | 2026 | 40.000  | 20.000 | 20.000 |     |     |     |     |
|           |               |              |         | 2026 | 20.000  | 10.000 | 10.000 |     |     |     |     |
|           |               |              |         | 2026 | 60.000  | 30.000 | 30.000 |     |     |     |     |

- 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.

| Cost Type      | Cost Category | Expense Type | Details | Total | Total   | 2023 > | 2024 > | 2025 > | 2026 < | Jan    | Feb    |
|----------------|---------------|--------------|---------|-------|---------|--------|--------|--------|--------|--------|--------|
| ▼ Forecast (1) |               |              |         | 0     | 80.000  |        |        | 40.000 |        | 20.000 | 20.000 |
| ▼ (1)          |               |              |         | 0     | 80.000  |        |        | 40.000 |        | 20.000 | 20.000 |
| Forecast       |               |              |         | 0     | 80.000  |        |        | 40.000 |        | 20.000 | 20.000 |
| ▼ Budget (1)   |               |              |         | 0     | 120.000 |        |        | 60.000 |        | 30.000 | 30.000 |
| ▼ (1)          |               |              |         | 0     | 120.000 |        |        | 60.000 |        | 30.000 | 30.000 |
| Budget         |               |              |         | 0     | 120.000 |        |        | 60.000 |        | 30.000 | 30.000 |
| ▼ Actual (1)   |               |              |         | 0     | 40.000  |        |        | 20.000 |        | 10.000 | 10.000 |
| ▼ (1)          |               |              |         | 0     | 40.000  |        |        | 20.000 |        | 10.000 | 10.000 |
| Actual         |               |              |         | 0     | 40.000  |        |        | 20.000 |        | 10.000 | 10.000 |

► The functions of the buttons are the same as in the *Resource Plan* tab. (see [Resource Plan tab - Create Resource Plan manually](#))

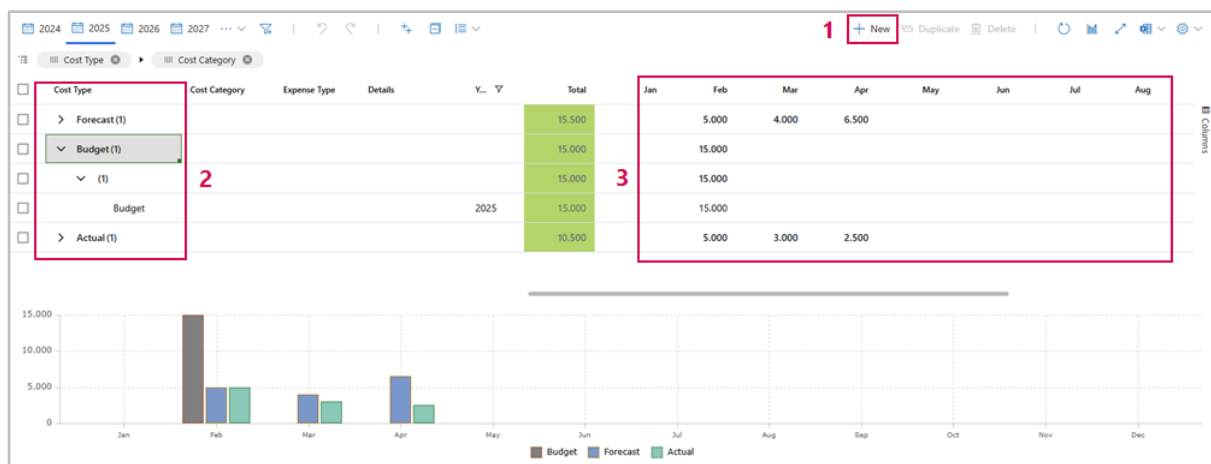
► For clarity, the steps are shown using the default view.

- The use of the Multi-year view is described in the section [Use Multi-year view in Resource Plan](#) <sup>109</sup>.

## 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](#) <sup>31</sup>)

## 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.

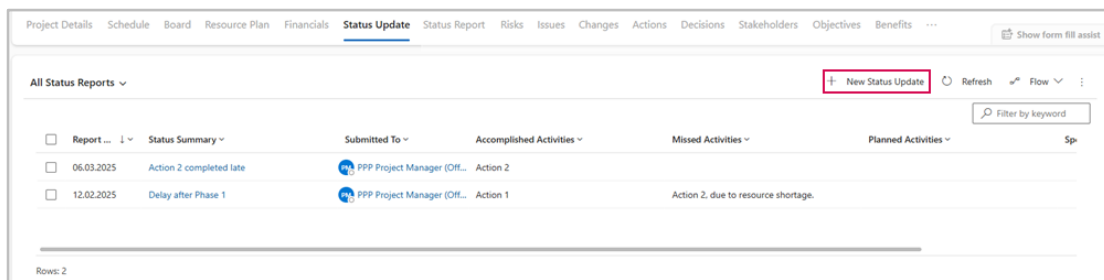
We will guide you through the process step by step and show you how to work with status updates:

- [Add Status Update](#) <sup>114</sup>
- [Edit Status Update](#) <sup>117</sup>
- [Deactivate and Activate Status Update](#) <sup>118</sup>
- [Adjust Table](#) <sup>120</sup>
- [Further Commands for Status Updates](#) <sup>122</sup>

### 8.1 Add Status Update

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

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



Quick Create: Status Update

×

Status Details

Report Date

\*

---

Project

\*

Project X

×

Status Summary

\*

---

Owner

\*

PPP Project Manager (Offline)

×

Submitted To

\*

---

Email Status Update

☒

Yes

Updates

Accomplished Activities

---

Missed Activities

---

Planned Activities

---

Sponsor Actions

---

Save and Close

▼

Cancel

➤ Fill in the form:

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

- **Status Details:**

- **Report Day:**

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

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

---

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

---

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

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

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

---

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

---

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

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

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

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

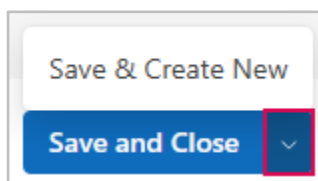
- **Updates:** Description of the status updates.

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

➤ Click *Save and close*.

Or

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



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

## 8.2 Edit Status Update

A status update can be edited as follows:

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

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

Or

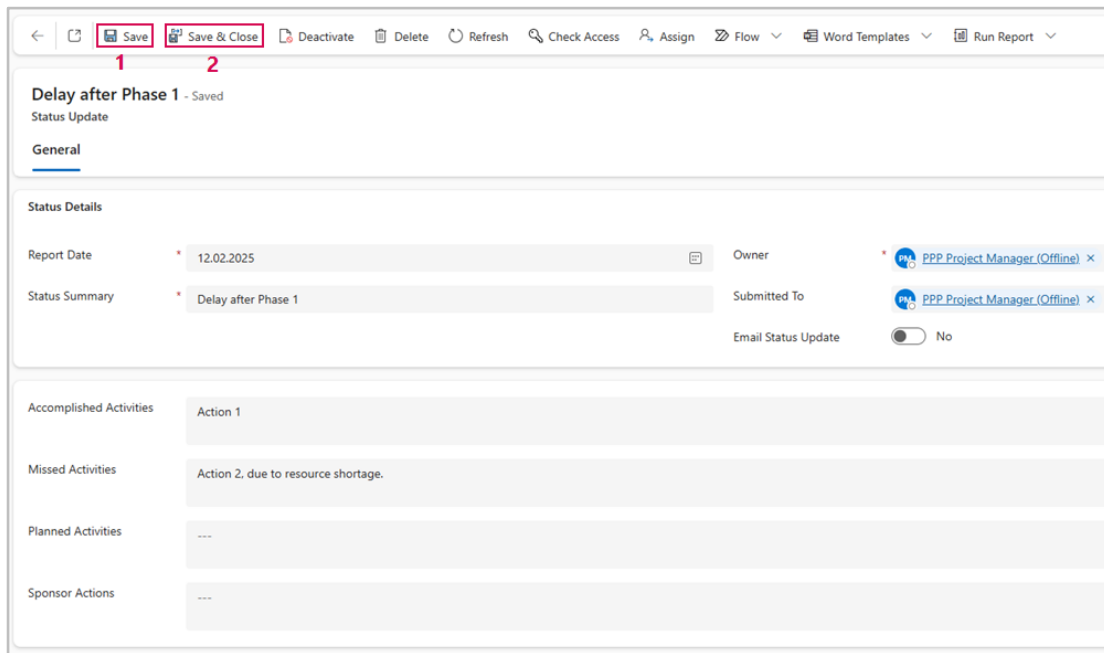
- Click on the row of the status update to select it.
- Click on *Edit*.

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

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

Or

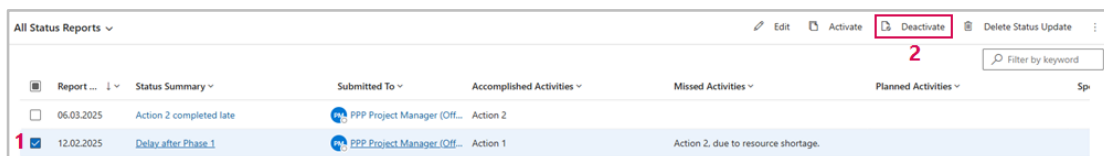
- Click *Save & Close* (2) to save the changes and finish editing.



## 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)



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

- ▶ The *Confirm Deactivation* field opens.

- Click *Deactivate* to deactivate the status update.

### Confirm Deactivation

Do you want to deactivate the selected 1 Status Update? You can reactivate it later, if you wish.

This action will change the status of the selected Status Update to Inactive.

Deactivate
Cancel

#### Activate status update:

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

| All Status Reports                             |                         |                             |                                                                                                   |                                     |                    |    |
|------------------------------------------------|-------------------------|-----------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------|--------------------|----|
|                                                |                         |                             | <span>Edit</span> <span>Activate</span> <span>Deactivate</span> <span>Delete Status Update</span> |                                     |                    |    |
| Report ...                                     | Status Summary          | Submitted To                | Accomplished Activities                                                                           | Missed Activities                   | Planned Activities | Sp |
| <input type="checkbox"/> 06.03.2025            | Action 2 completed late | PPP Project Manager (Off... | Action 2                                                                                          |                                     |                    |    |
| <input checked="" type="checkbox"/> 12.02.2025 | Delay after Phase 1     | PPP Project Manager (Off... | Action 1                                                                                          | Action 2, due to resource shortage. |                    |    |

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

### Confirm Status Update Activation

Are you sure you want to activate the selected 1 Status Update?

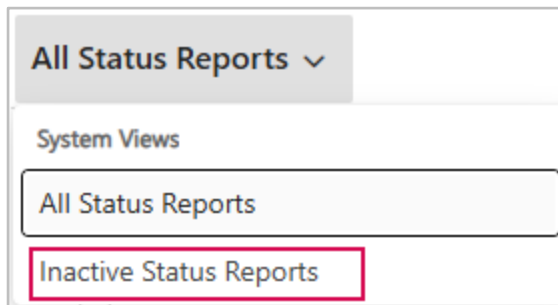
This will set the Status Update to the Active state.

Activate
Cancel

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

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

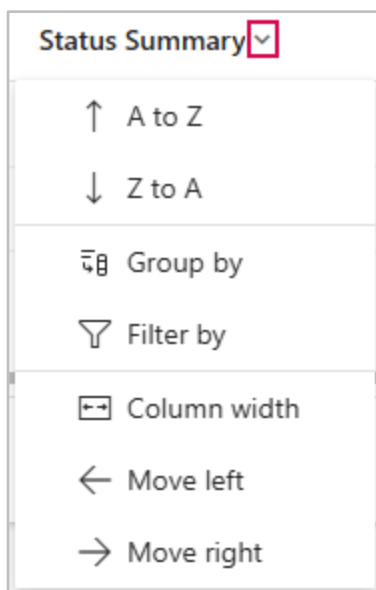
- Click on *Inactive Status Reports*.



## 8.4 Adjust Table

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

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



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

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

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

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

Status Summary ▾

Filter by ×

Equals ▾

Delay after Phase 1

Apply

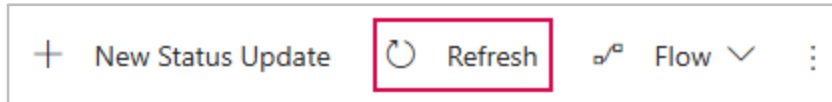
Clear

► 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:

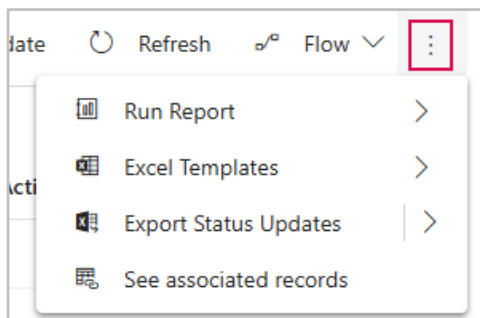
- Click *Refresh* to update the table.



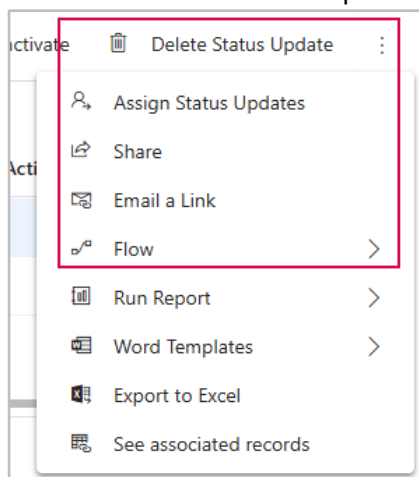
## 8.5 Further Commands for Status Updates

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.



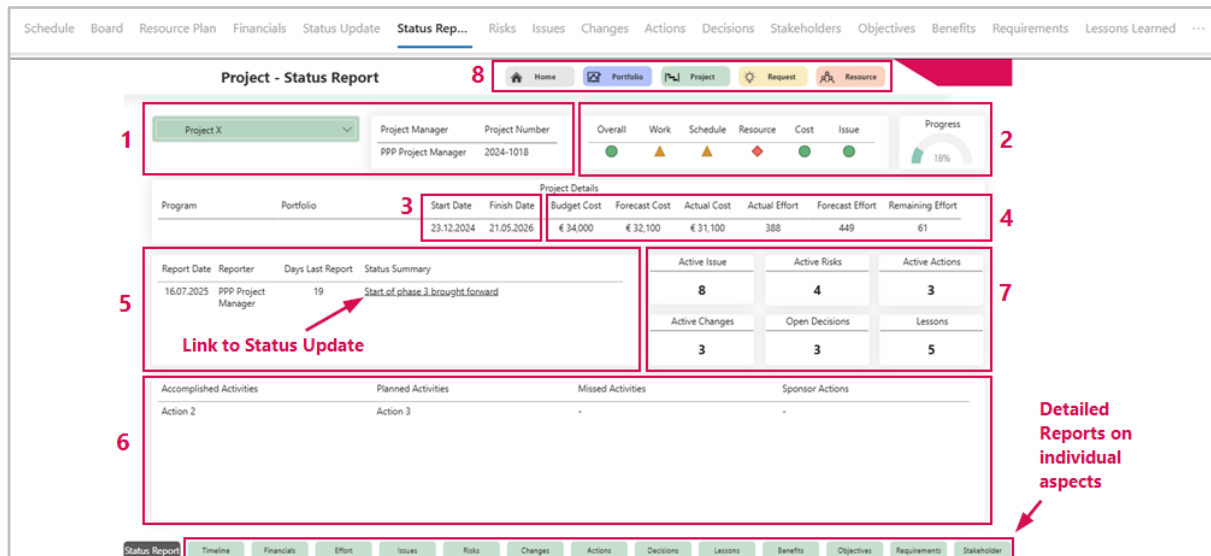
- 
- Select the desired command:

- *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.



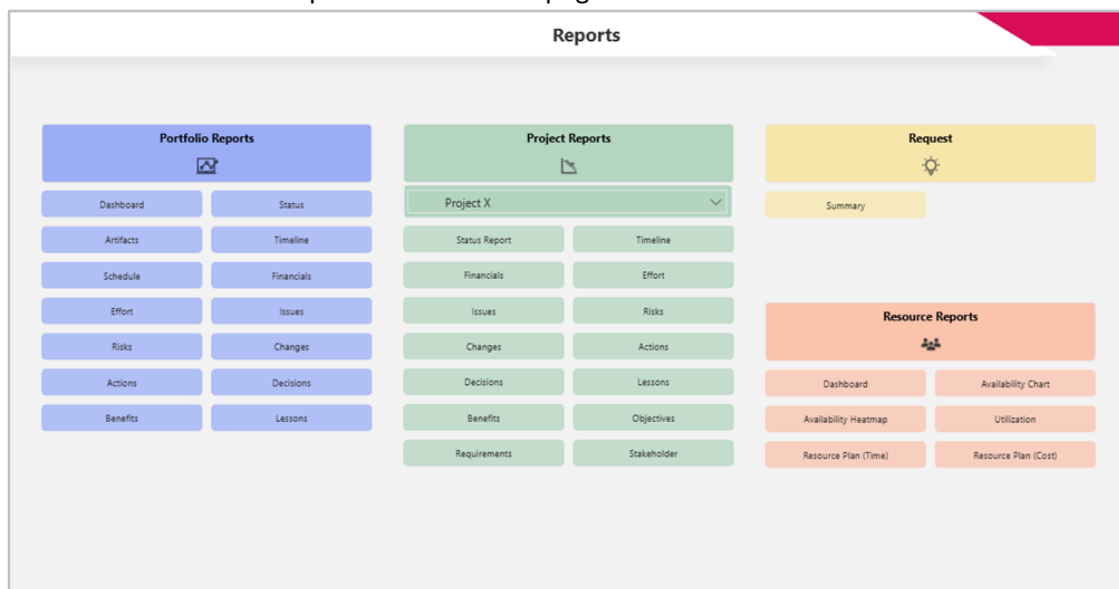
On the start page of this tab, you will find the most important information about the current project, such as:

- 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** (2)
- Project start and end dates (3)
- Cost development (4)
- Information and link to the last **Status Update** (5)
- Actions from the last Status Update and their implementation status (6)
- Number of active **Issues** (153), **Risks** (143), **Changes** (161), Actions, open **Decisions** (198), and **Lessons** (241) (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](#) <sup>126</sup>
- [Financials](#) <sup>128</sup>
- [Effort](#) <sup>131</sup>
- [Issues](#) <sup>133</sup>
- [Risks](#) <sup>134</sup>
- [Changes](#) <sup>135</sup>
- [Actions](#) <sup>136</sup>
- [Decisions](#) <sup>137</sup>
- [Lessons](#) <sup>138</sup>
- [Benefits](#) <sup>139</sup>
- [Objects](#) <sup>140</sup>
- [Requirements](#) <sup>141</sup>
- [Stakeholder](#) <sup>142</sup>

► 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](#) <sup>11</sup>. Available languages: English and German.

## 9.1 Timeline

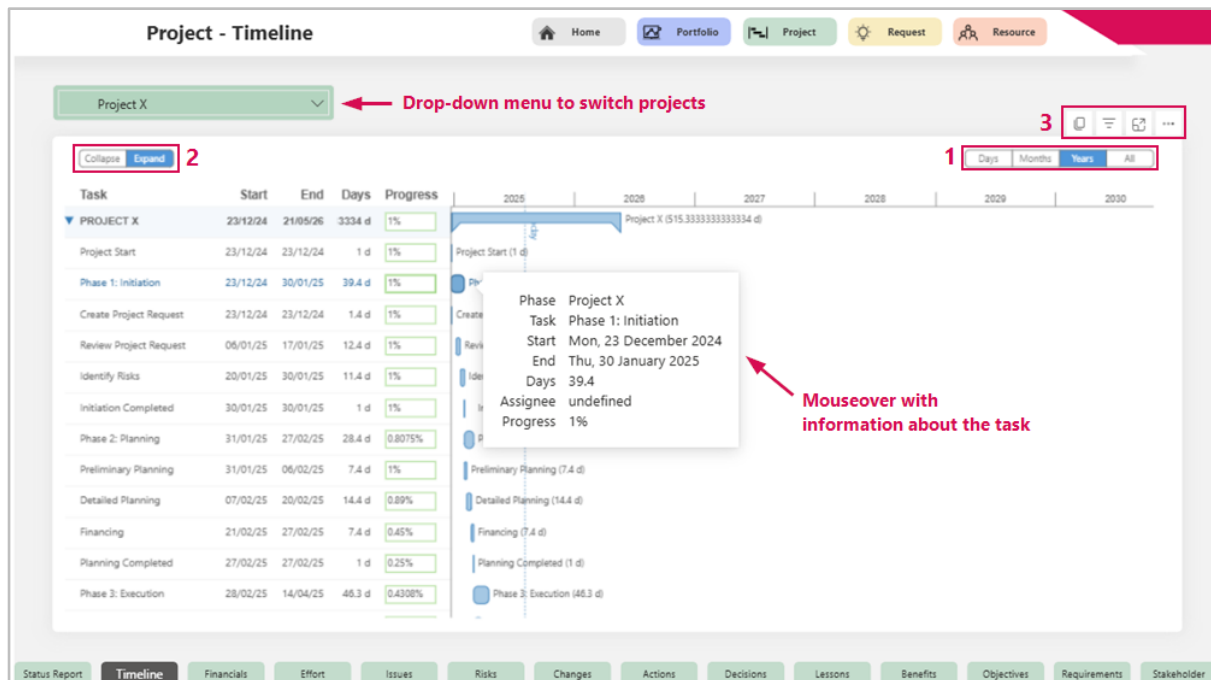
On the *Timeline* tab, you will find a visual representation of the project progress in the form of a table and a Gantt chart:

### Table:

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

### Gantt chart:

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



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

The time scale of the timeline can be adjusted flexibly:

- Click on the desired time scale.

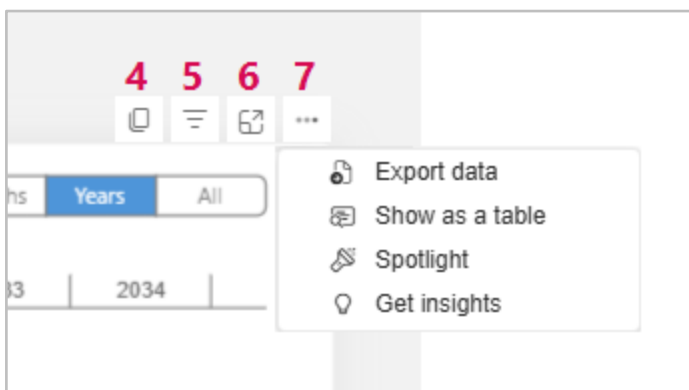
- *Years* (default view)
- *Months*
- *Days*
- *All*: Automatically displays only the period relevant to the project (project start to project end).

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

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

#### Additional options (3):

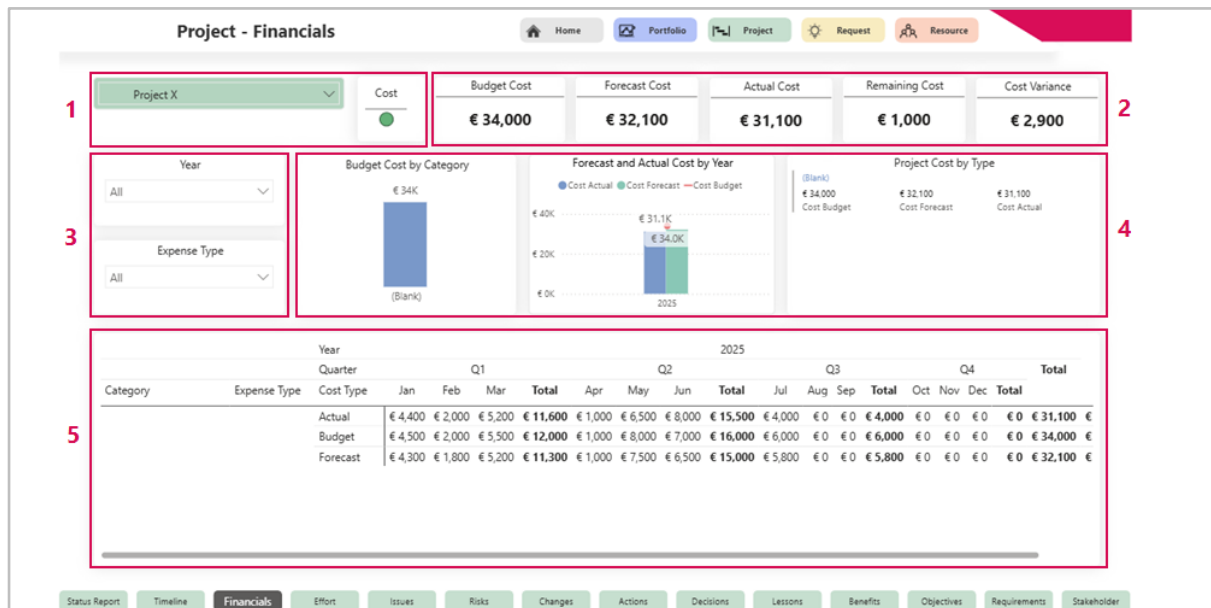
- Copy timeline as graphic. (4)
- Apply filters to influence the visual representation. (5)
- Show only enlarged timeline. (6)
- More options (7):
  - Export data
  - Display data as table
  - Highlight timeline
  - Show insights



## 9.2 Financials

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

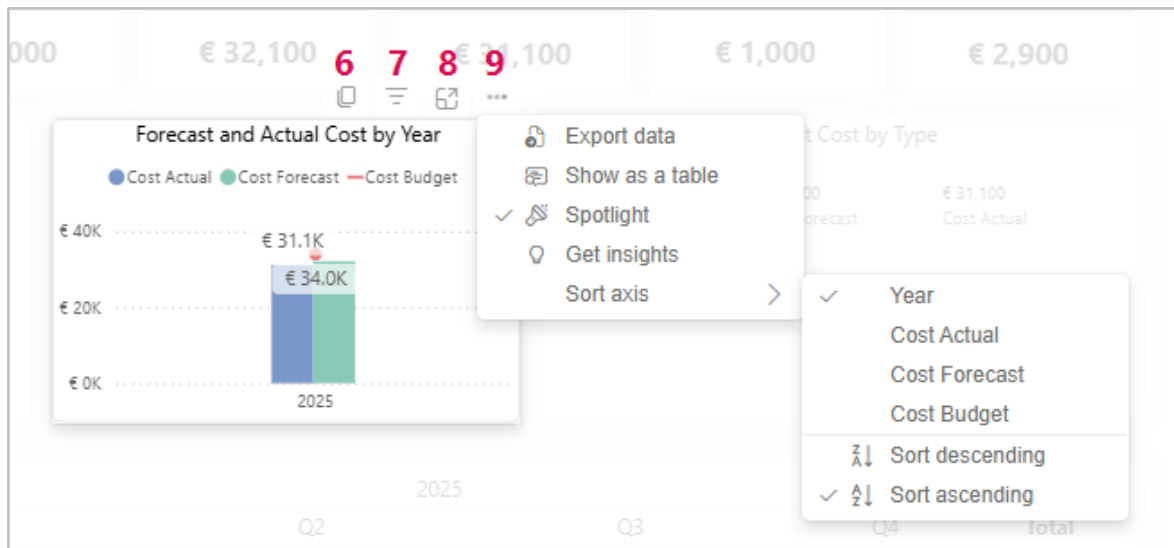
- Project name and traffic light display for evaluating the current cost situation (1)
- Numerical information on costs (2):
  - Budget Cost
  - Forecast Costs
  - Actual Cost
  - Remaining Cost
  - Cost Variance
- Filter and customize data using two drop-down menus (3):
  - Select the year for which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



### Additional display options for the bar chart:

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

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



## 9.3 Effort

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

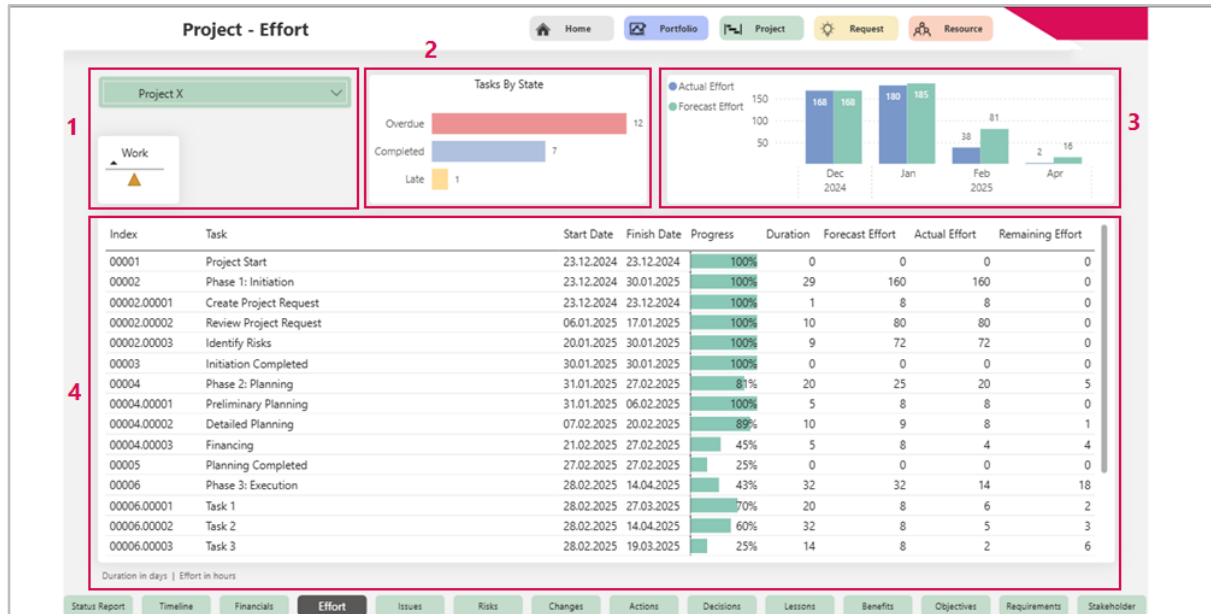
- Project name and traffic light display for evaluating the amount of work involved (1)
- Status overview of tasks:

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

- Overdue tasks
- Completed tasks
- Delayed tasks
- Comparison of actual and estimated effort:  
A column chart (3) compares the actual effort with the estimated effort.
- Tabular list of tasks:

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

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



## 9.4 Issues

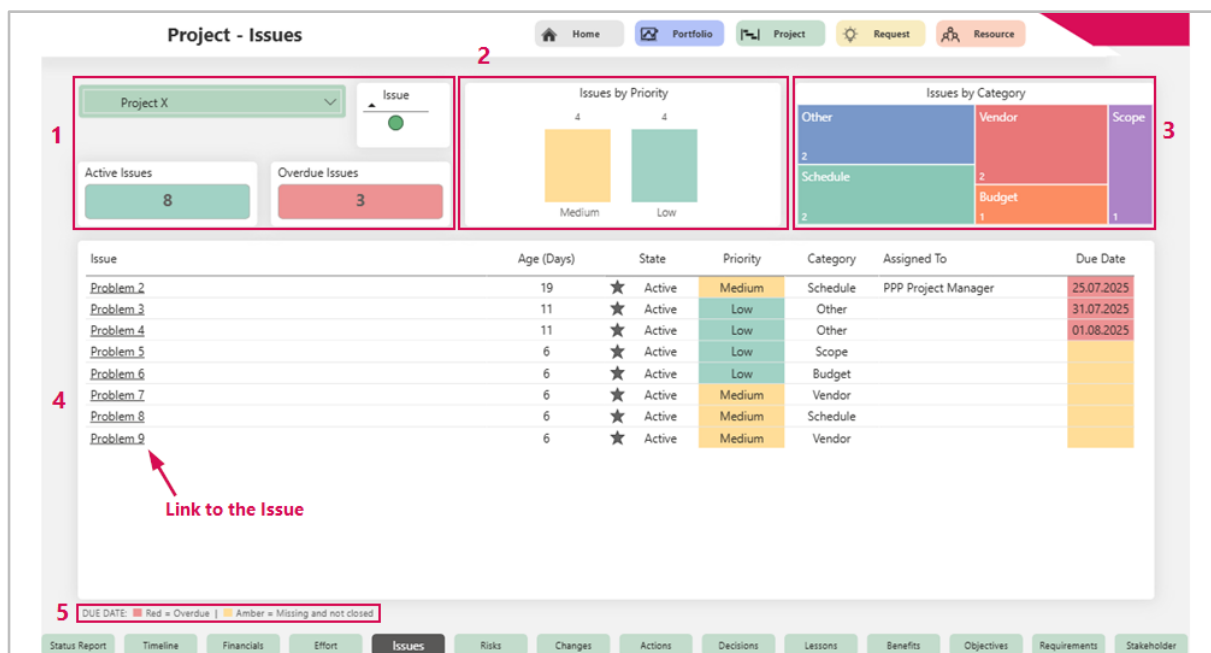
The *Issues* tab provides a detailed overview of all issues in the project.

### Project overview (1):

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

### Visualization of issues:

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



## 9.5 Risks

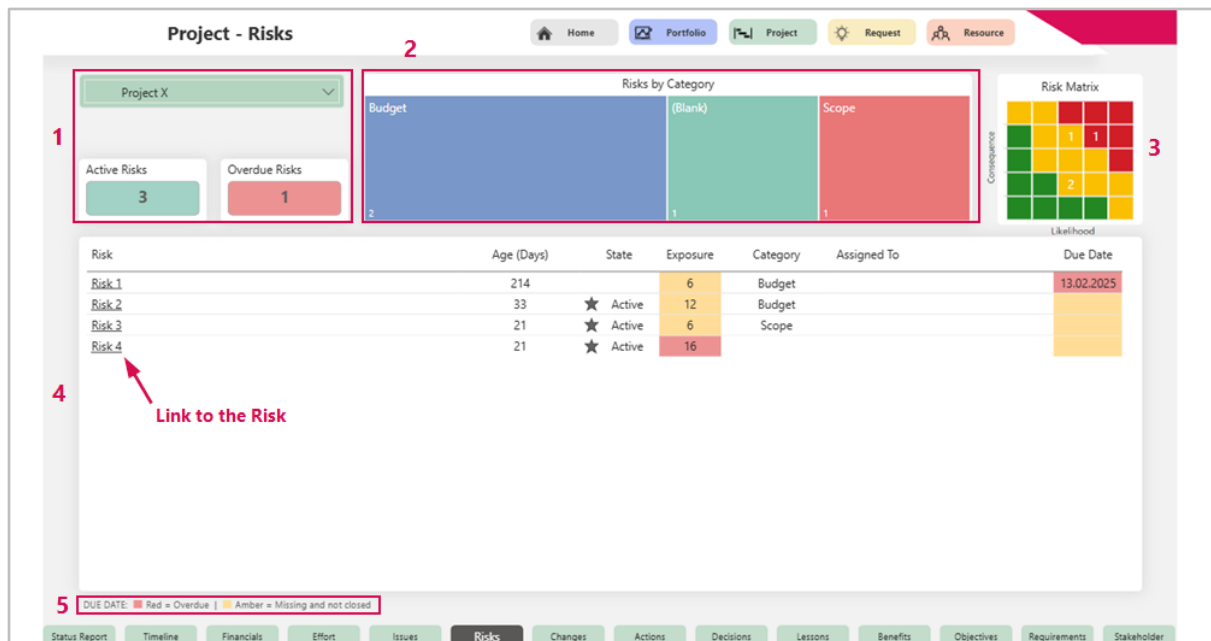
The *Risks* tab provides a detailed overview of all risks in the project:

### Project overview (1):

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

### Visualization of risks:

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



## 9.6 Changes

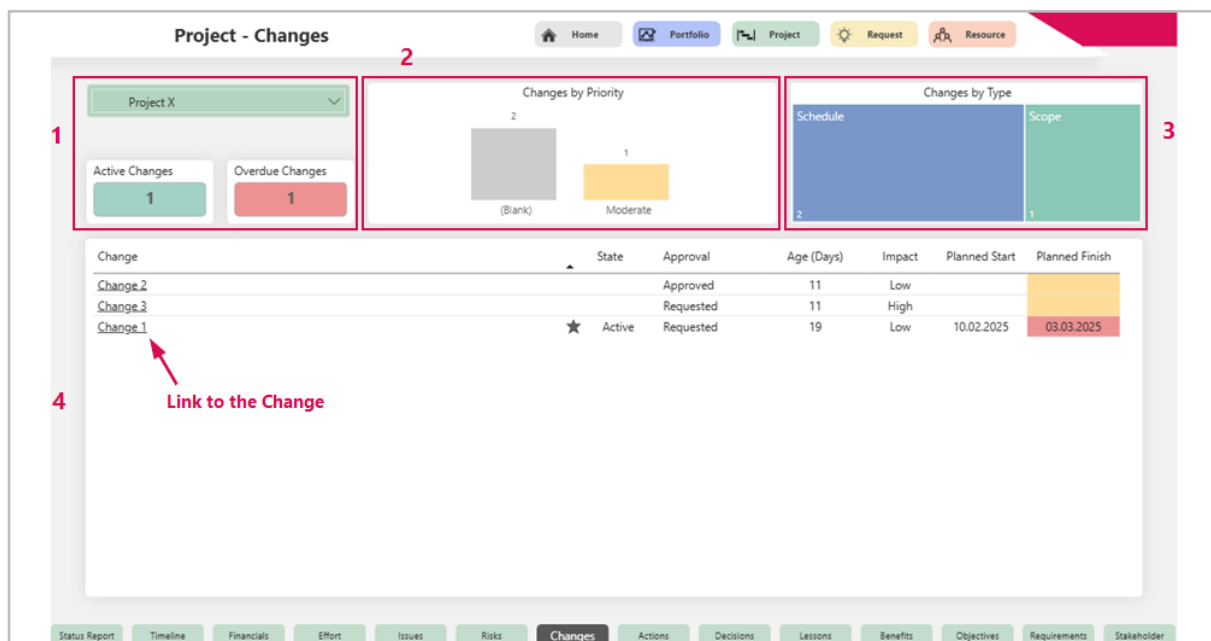
The *Changes* tab provides a detailed overview of all changes in the project.

### Project overview (1):

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

### Visualization of changes:

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



## 9.7 Actions

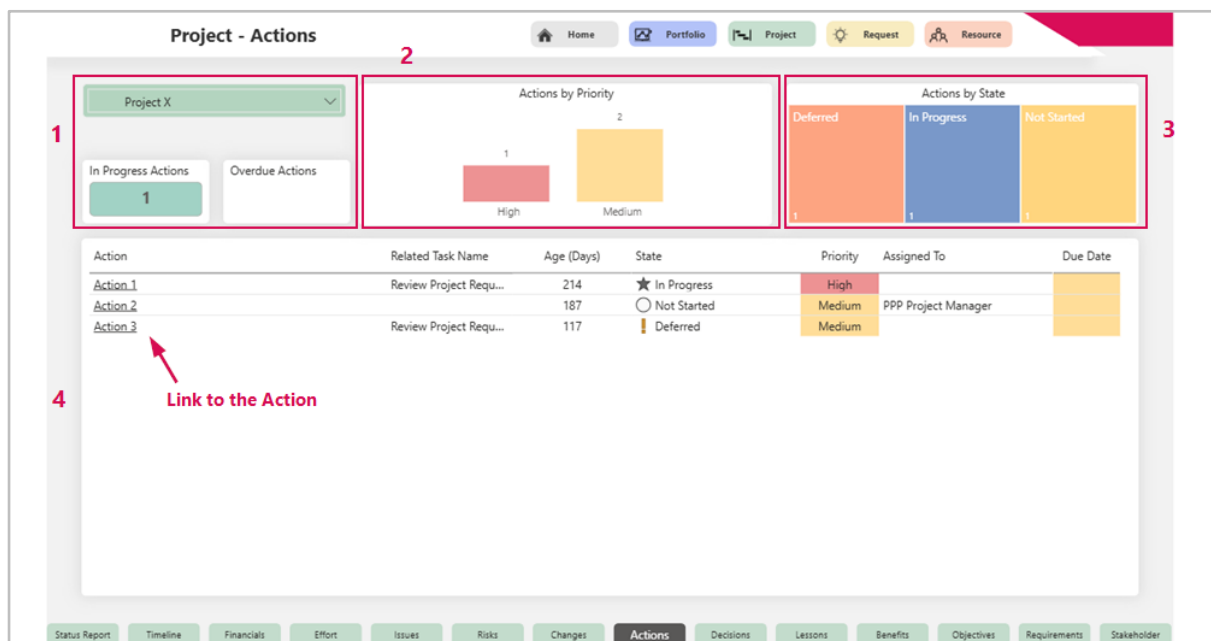
The *Actions* tab provides a detailed overview of all actions in the project.

### Project overview (1):

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

### Visualization of Actions:

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



## 9.8 Decisions

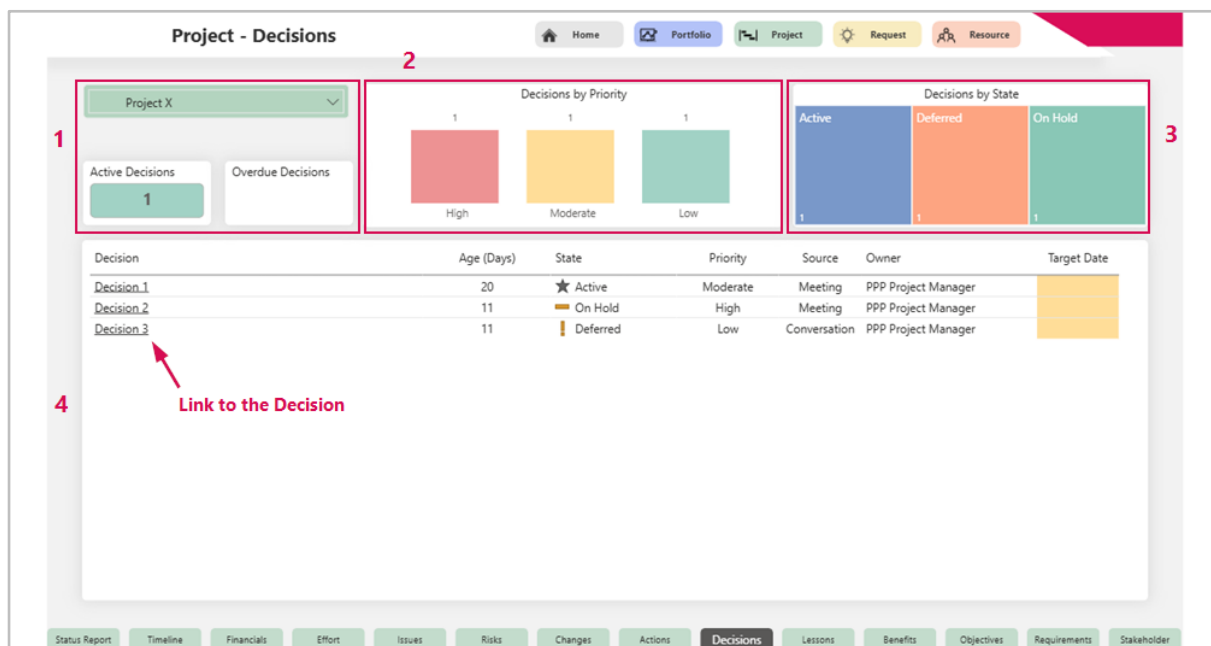
The *Decisions* tab provides a detailed overview of all decisions in the project.

### Project overview (1):

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

### Visualization of Decisions:

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



## 9.9 Lessons

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

### Project overview (1):

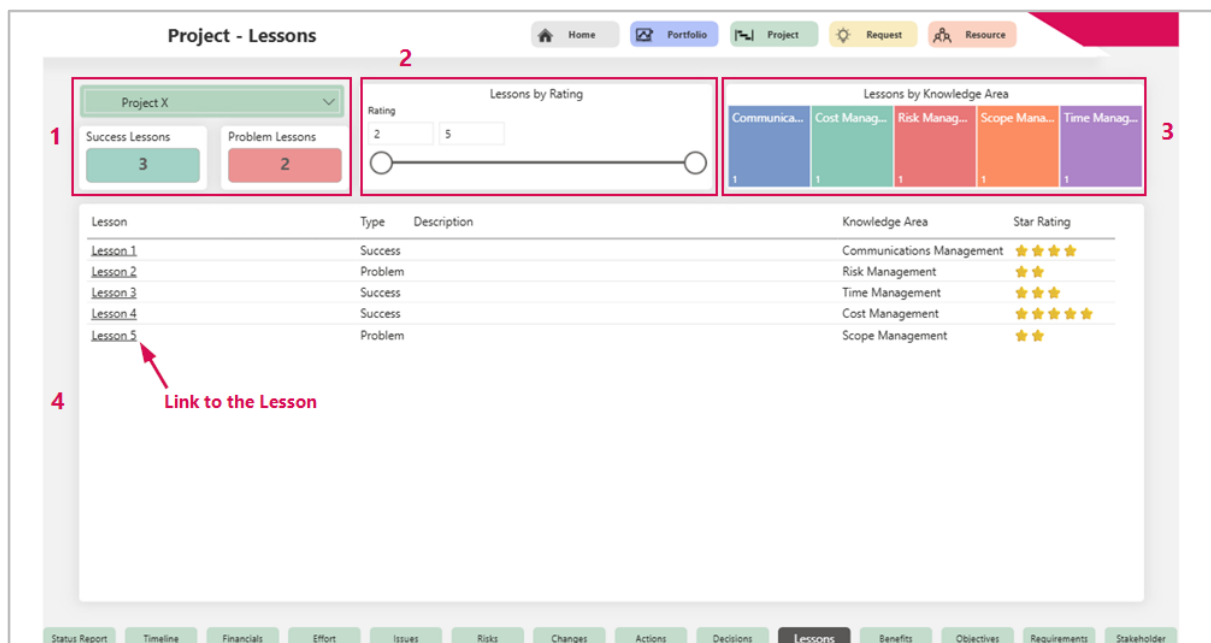
- Project Name
- Number of successful Lessons
- Number of problematic Lessons

### Filter by rating:

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

### Visualization of Lessons Learned:

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



## 9.10 Benefits

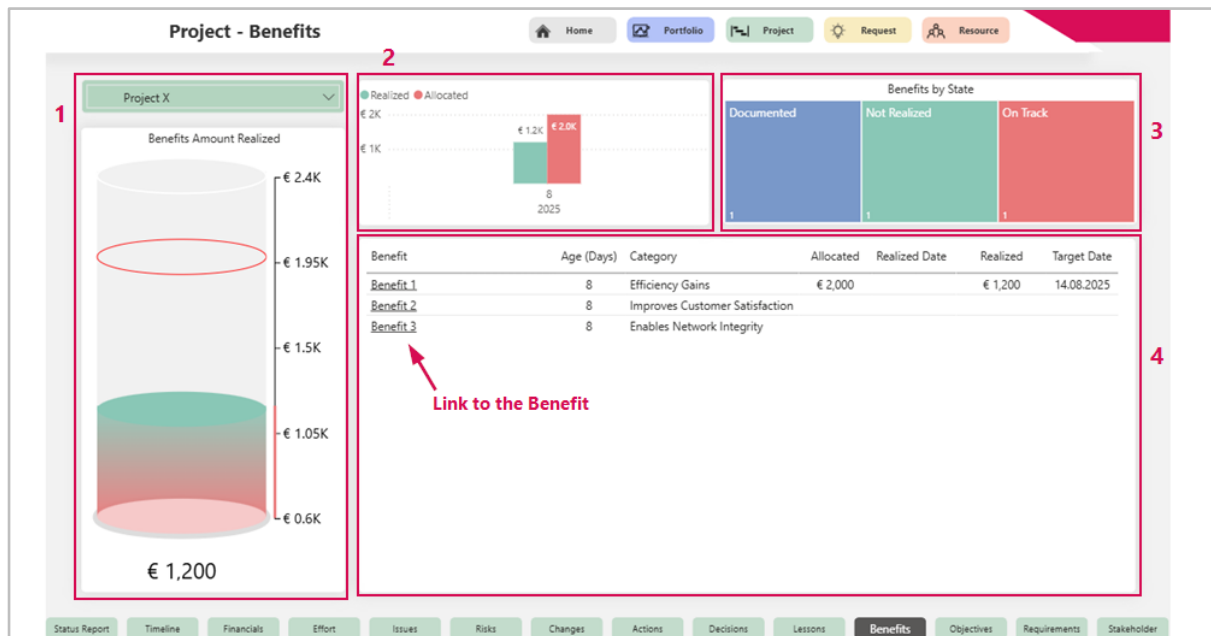
The *Benefits* tab provides a detailed overview of all benefits in the project.

### 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

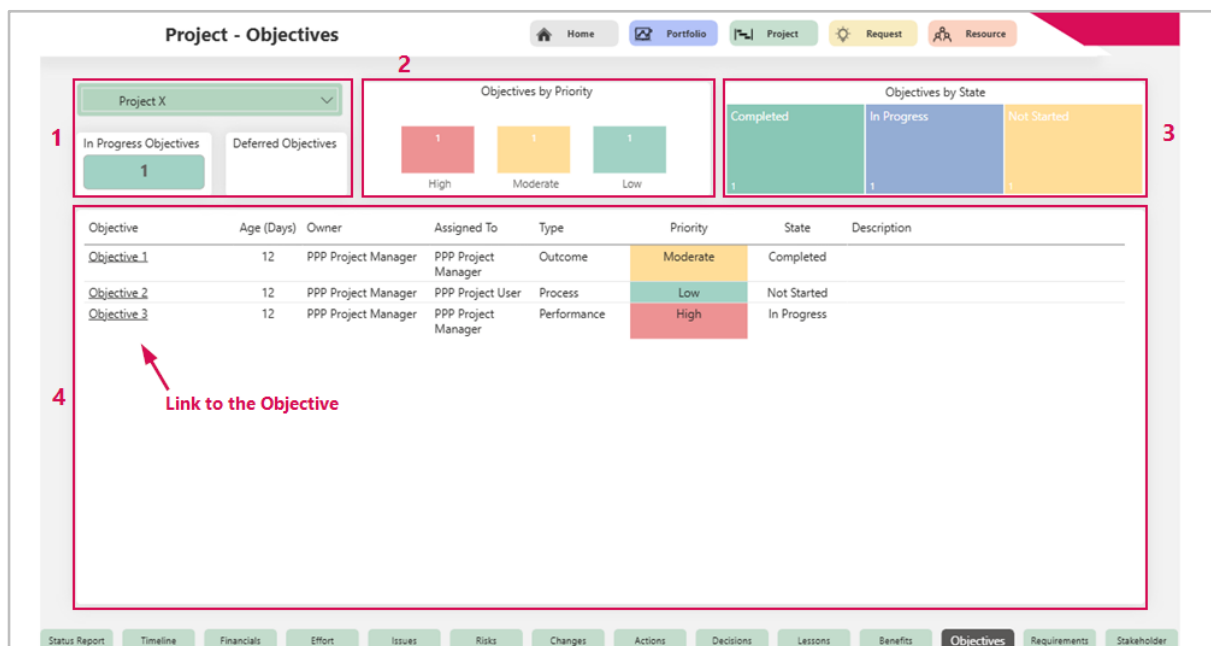
The *Objectives* tab provides a detailed overview of all objectives in the project.

### 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

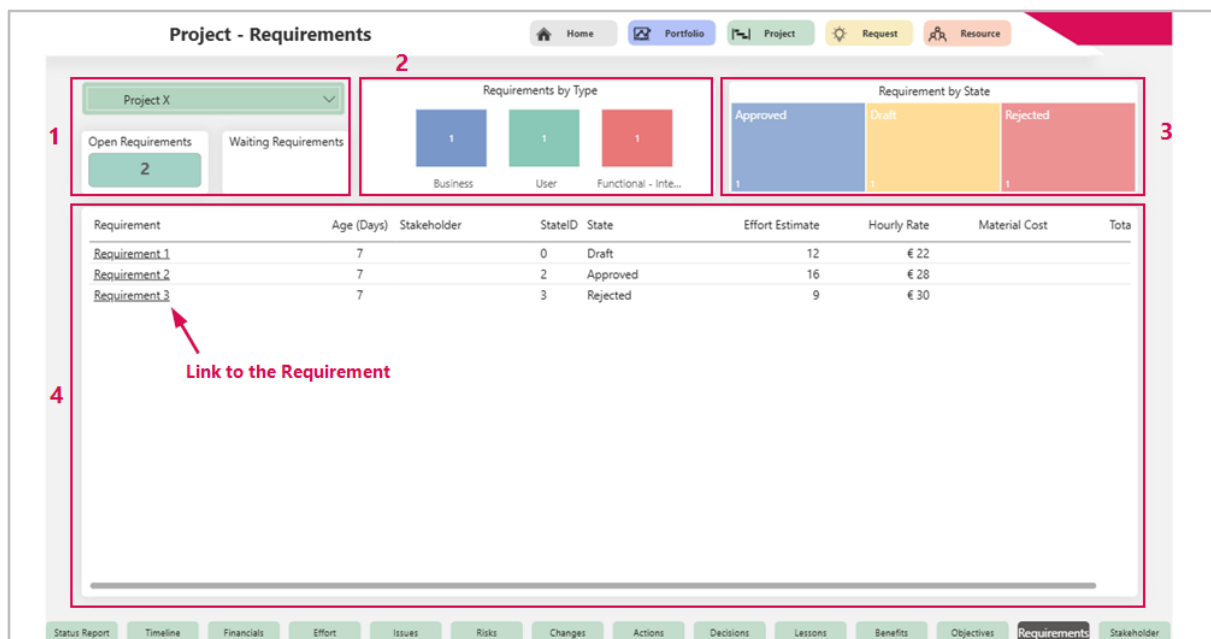
The *Requirements* tab provides a detailed overview of all requirements in the project.

### 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

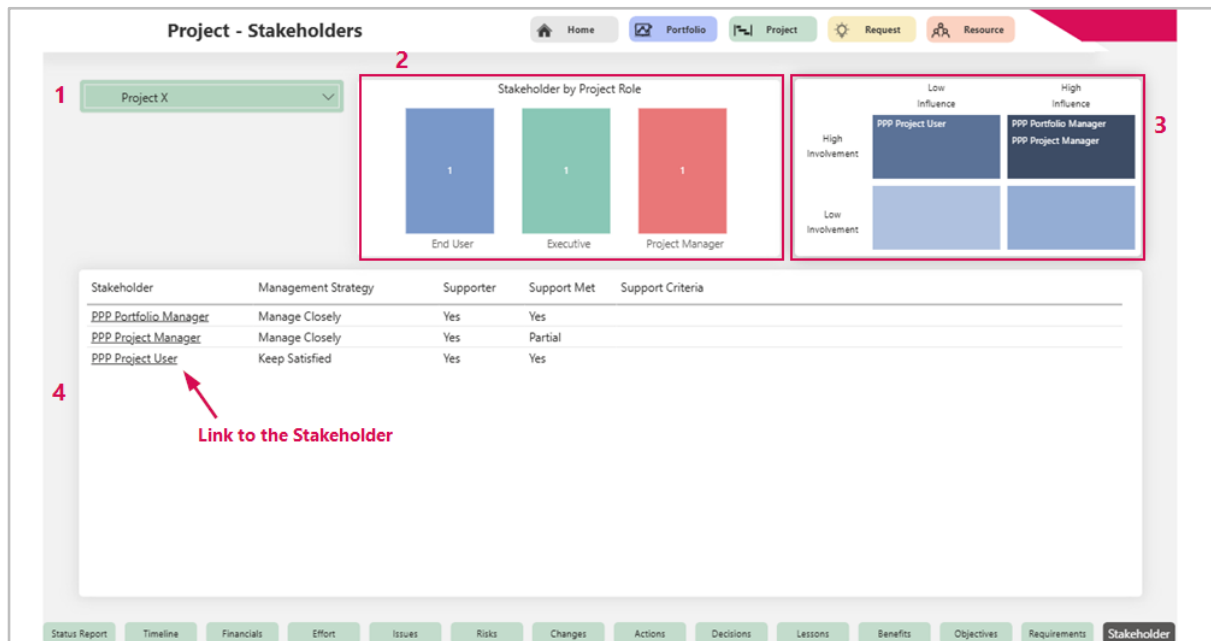
The *Stakeholders* tab provides a detailed overview of all stakeholders in the project.

### 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**  143
- **Edit Risks**  147
- **Deactivate and Activate Risks**  148
- **Read the Risk Matrix and set filters**  150
- **Use additional Commands for Risks**  151

### 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.

All Risks ▾

<

Quick Create: Risk

×

General

Risk Name \*

---

Project \*

Project X ×

🔍

Owner \*

PPP Project Manager (Offline ×)

🔍

Assigned To

---

🔍

Category

---

▼

Due Date

---

📅

State

Active

▼

Exposure

Likelihood \*

0

Consequence \*

0

Cost

---

Trigger

---

▼

Details

Description

---

Mitigation Plan

---

Contingency Plan

---

Trigger Description

---

Save and Close

Cancel

➤ Fill out the form:

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

▪ **General:**

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

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

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

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

▪ **Category:**

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

The screenshot shows a form with the following fields: Category, Due Date, State, Exposure, and Likelihood. The 'Category' field is active, and a dropdown menu is displayed. The dropdown menu contains the following options: --Select-- (highlighted), --Select-- (checked), Scope, Schedule, Budget, Vendor, and Other. The 'Likelihood' field has a red asterisk next to it.

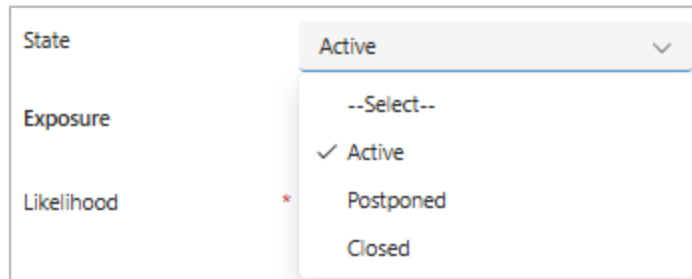
▪ **Due Date:**

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

The screenshot shows a form with the following fields: Due Date, State, Exposure, Likelihood, and Consequence. The 'Due Date' field is active, and a calendar is displayed. The calendar shows the month of February 2025. The background form shows the following fields: Due Date, State, Exposure, Likelihood, and Consequence. The 'Likelihood' and 'Consequence' fields have red asterisks next to them.

▪ **State:**

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



The screenshot shows a form with three fields: 'State', 'Exposure', and 'Likelihood'. The 'State' field is selected, and a drop-down menu is open. The menu contains the following options: '--Select--', 'Active' (which is selected and has a checkmark), 'Postponed', and 'Closed'. A red asterisk is visible next to the 'Likelihood' field.

▪ **Exposure:**

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

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

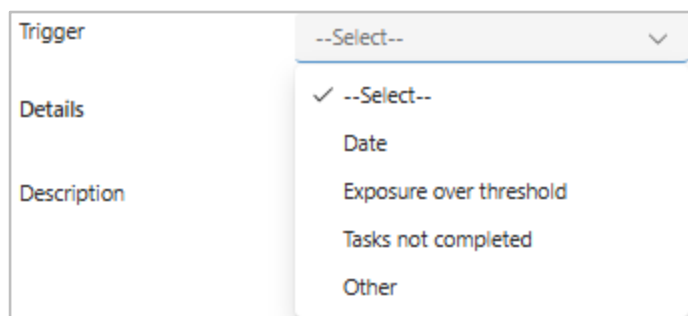
- **Consequence:** Severity of the impact if the Risk occurs.

- 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.



The screenshot shows a form with three fields: 'Trigger', 'Details', and 'Description'. The 'Trigger' field is selected, and a drop-down menu is open. The menu contains the following options: '--Select--' (which is selected and has a checkmark), 'Date', 'Exposure over threshold', 'Tasks not completed', and 'Other'.

▪ **Details:**

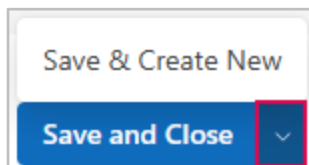
- **Description, Mitigation Plan, Contingency Plan, Trigger Description:**

- 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:

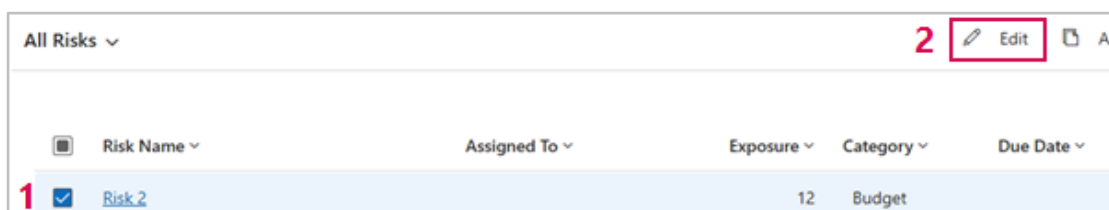
➤ Click on the preview in the *Risk Name* column. ▶ The form for editing the Risk opens.



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

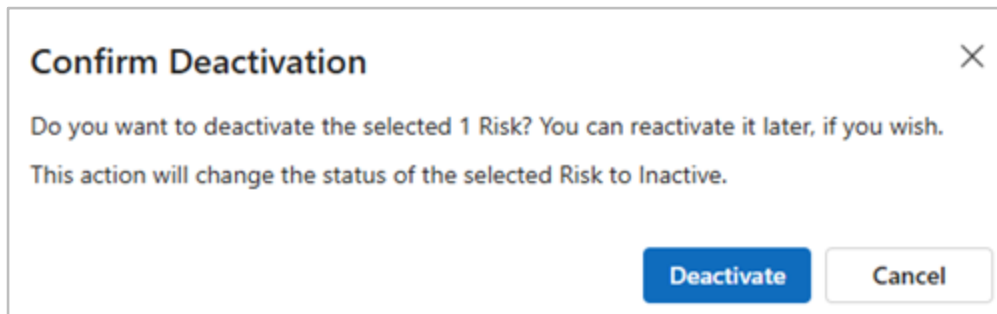
Risks are active by default. You can deactivate Risks:

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

|   | Risk Name | Assigned To | Exposure | Category | Due Date | State  |
|---|-----------|-------------|----------|----------|----------|--------|
| 1 | Risk 2    |             | 12       | Budget   |          | Active |

- ▶ The *Confirm Deactivation* field opens.

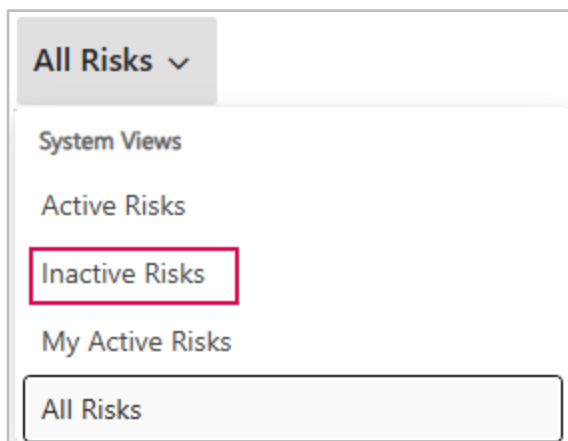
- Click *Deactivate* to deactivate the Risk.



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

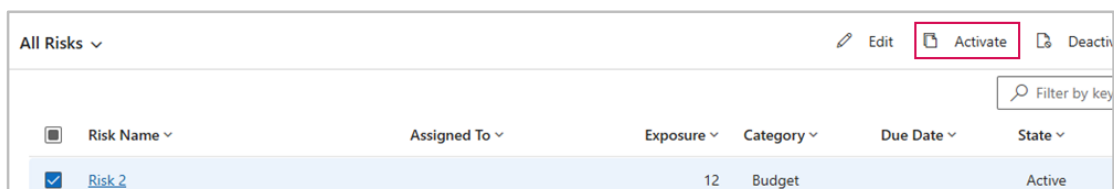
#### Display only inactive Risks:

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



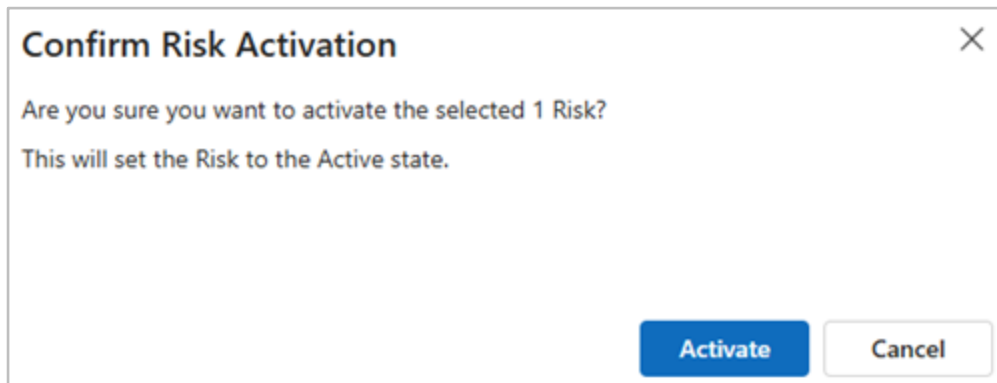
#### Activate Risks:

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



- ▶ The *Confirm Risk Activation* field opens.

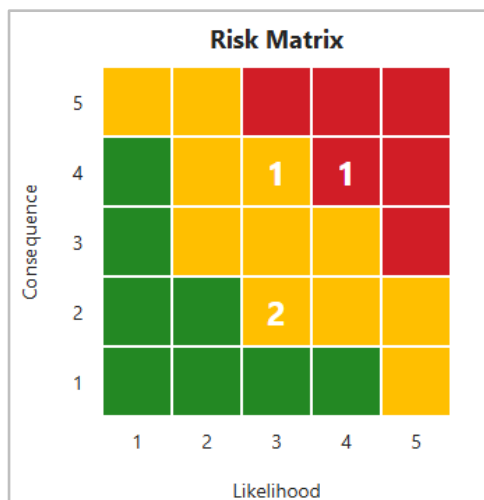
- Click on *Activate* to activate the Risk.



## 10.4 Risk Matrix

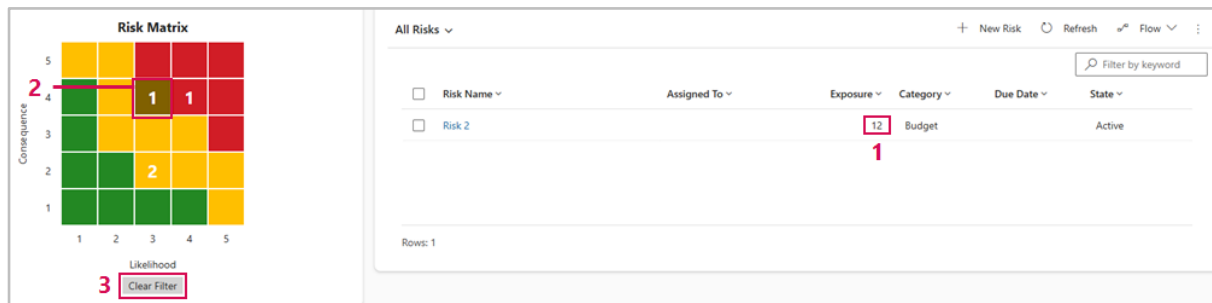
The *Risks* tab displays a Risk Matrix that shows the number of Risks per likelihood and consequence.

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



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

**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.

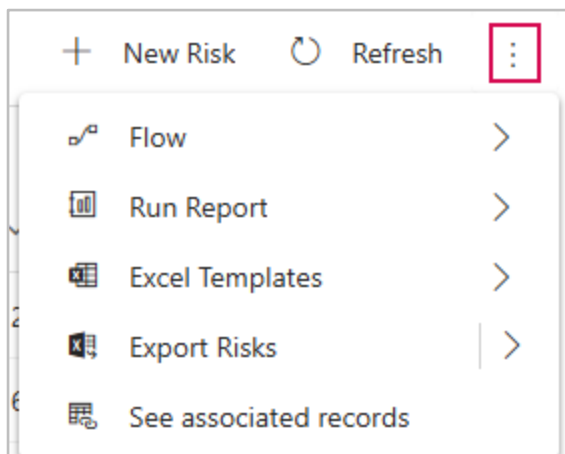
### Remove filter:

- Click on the field in the matrix again (2).
- Or
- Click on *Clear Filter* (3).

## 10.5 Additional Commands for Risks

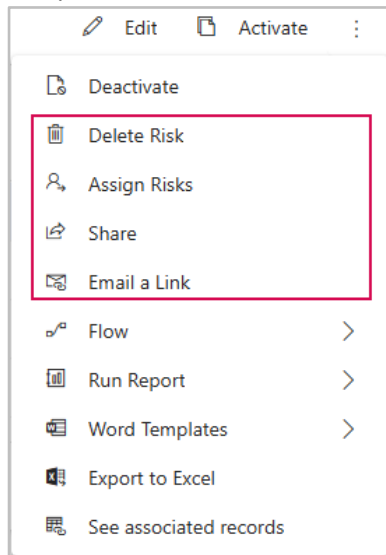
Above the *All Risks* table, there are additional commands that you can use:

- 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**  153
- **Edit Issues**  157
- **Deactivate and Activate Issues**  158
- **Use additional Commands for Issues**  159

### 11.1 Add Issues

To add an *Issue*, proceed as follows:

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

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

Quick Create: Issue

×

General

Issue Name

\*

---

Project

\*

Project X ×

🔍

Owner

\*

PM PPP Project Manager (Offline) ×

🔍

Status

Active

▼

Assigned To

---

🔍

Discussion

---

Category

---

▼

Due Date

---

📅

Priority

Medium

▼

Resolution

---

Save and Close

▼

Cancel

➤ 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.

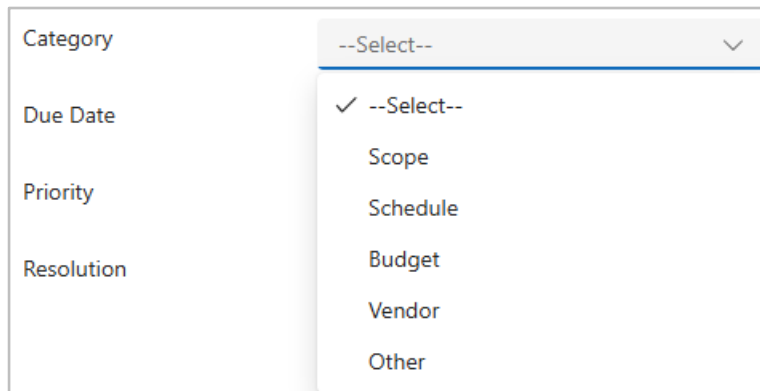
- **Assigned To:** Stakeholder to whom the risk is assigned.

➤ Click on the input field, press the Enter key, and enter the desired name.

- **Discussion:** Enter the discussion points for the Issue.

▪ **Category:**

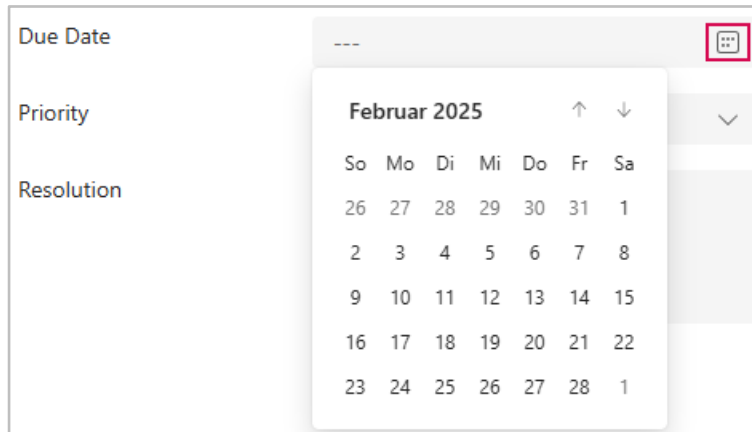
➤ Click in the field and select the desired category from the drop-down menu.



The screenshot shows a form with several fields: 'Category', 'Due Date', 'Priority', and 'Resolution'. The 'Category' field is currently selected, and its dropdown menu is open. The dropdown menu lists the following options: '--Select--' (with a checkmark), 'Scope', 'Schedule', 'Budget', 'Vendor', and 'Other'.

▪ **Due Date:**

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



The screenshot shows a form with three fields: 'Due Date', 'Priority', and 'Resolution'. The 'Due Date' field is active, and a calendar dropdown is displayed. The calendar is for February 2025, showing days from the 26th of the previous month to the 1st of the current month. A red box highlights the calendar icon in the top right corner of the 'Due Date' field.

▪ **Priority:**

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

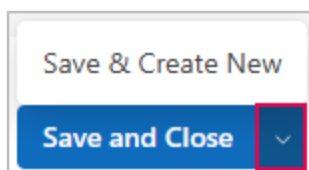
▪ **Resolution:**

- Enter a description of the resolution.

- Click *Save and Close*.

Or

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



The screenshot shows two buttons: 'Save & Create New' and 'Save and Close'. A red box highlights the down arrow icon on the right side of the 'Save and Close' button.

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

## 11.2 Edit Issues

An Issue can be edited as follows:

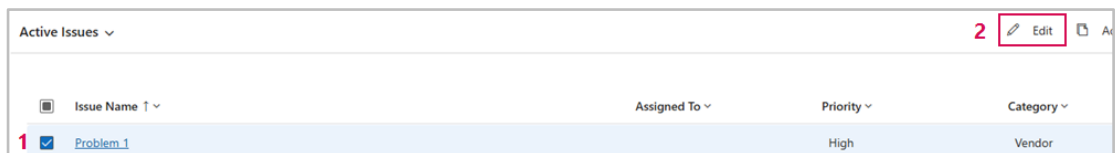
- Click on the preview in the *Issue Name* column. ► The form for editing the Issue opens.



| <input type="checkbox"/> | Issue Name ↑ ▾ | Assigned To | Priority | Category |
|--------------------------|----------------|-------------|----------|----------|
| <input type="checkbox"/> | Problem 1      |             |          |          |

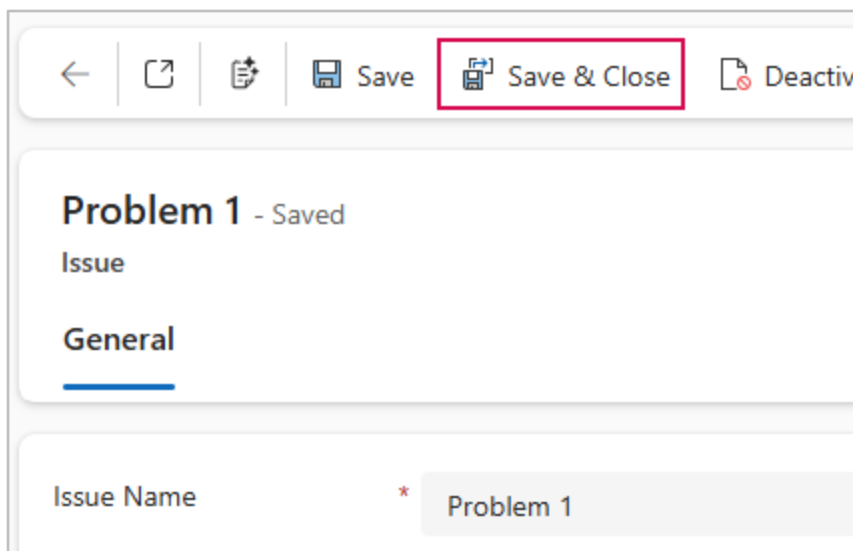
Or

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



| <input type="checkbox"/>            | Issue Name ↑ ▾ | Assigned To | Priority | Category |
|-------------------------------------|----------------|-------------|----------|----------|
| <input checked="" type="checkbox"/> | Problem 1      |             | High     | Vendor   |

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



← ↗ ↻ Save Save & Close Deactivate

**Problem 1** - Saved

Issue

**General**

Issue Name \* Problem 1

- 
- 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)

|                                                                                                                              |           |  |      |        |                              |            |               |                 |
|------------------------------------------------------------------------------------------------------------------------------|-----------|--|------|--------|------------------------------|------------|---------------|-----------------|
| Active Issues ▾                                                                                                              |           |  |      |        | ✎ Edit                       | 🔄 Activate | 🗑️ Deactivate | 🗑️ Delete Issue |
| <div> <div>Issue Name ▾</div> <div>Assigned To ▾</div> <div>Priority ▾</div> <div>Category ▾</div> <div>State ▾</div> </div> |           |  |      |        | <div>Filter by keyword</div> |            |               |                 |
| 1                                                                                                                            | Problem 1 |  | High | Vendor | Active                       |            |               |                 |

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

### Confirm Deactivation

Do you want to deactivate the selected 1 Issue? You can reactivate it later, if you wish.

This action will change the status of the selected Issue to Inactive.

Deactivate

Cancel

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*.

Active Issues ▾

System Views

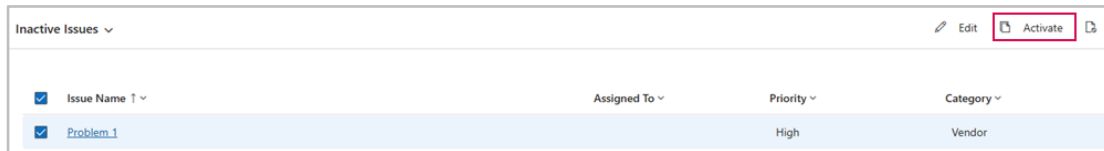
Active Issues

Inactive Issues

My Active Issues

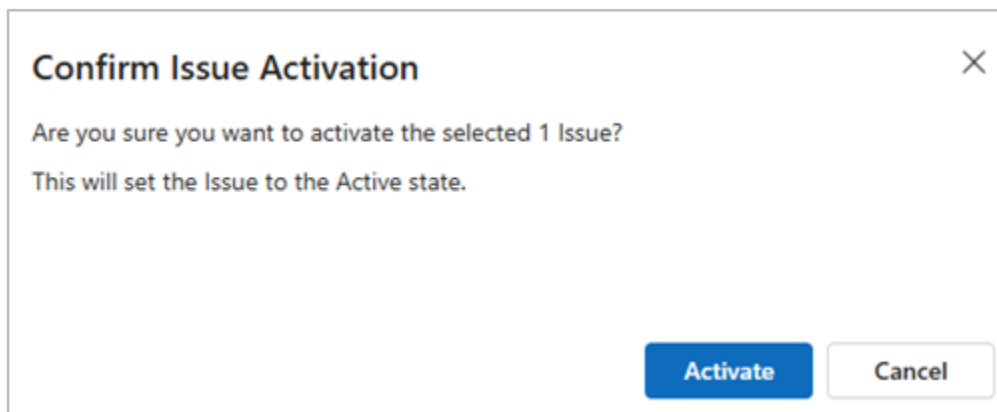
## Activate Issues:

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



| Inactive Issues ▾                             |               |            |            |
|-----------------------------------------------|---------------|------------|------------|
| Issue Name ▴ ▾                                | Assigned To ▾ | Priority ▾ | Category ▾ |
| <input checked="" type="checkbox"/> Problem 1 |               | High       | Vendor     |

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



### Confirm Issue Activation

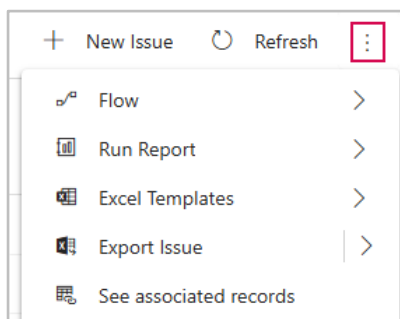
Are you sure you want to activate the selected 1 Issue?  
This will set the Issue to the Active state.

**Activate** **Cancel**

## 11.4 Additional Commands for Issues

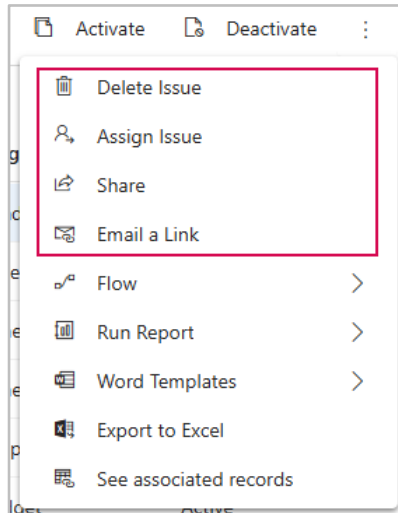
Above the *Active Issues* table, there are additional commands that you can use:

- 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**  161
- **Edit Changes**  167
- **Deactivate and Activate Changes**  168
- **Use additional Commands for Changes**  170

### 12.1 Add Changes

To add a *Change*, proceed as follows:

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

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

Quick Create: Change

×

General

Title \*

---

Project \*

Project X ×

🔍

Details

---

Owner \*

PPP Project Manager (Offline) ×

🔍

Requested By

---

🔍

Assigned To

---

🔍

Requested Date

---

📅

Change Type

---

▼

Planned Start Date

---

📅

Planned End Date

---

📅

State

---

▼

Approval

Not Yet Requested

▼

Priority

---

▼

Risk

None

▼

Impact

---

▼

Cost Impact

---

Additional Comments

---

Work Notes

---

Benefits

---

Change Plan

---

Backout Plan

---

Save and Close

Cancel

- Fill out the form:

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

- **General:**

- **Title:** Enter a meaningful title for the Change.
- **Project:** The current project is selected by default.

- **Details:**

- Enter a meaningful description of the Change.
- **Owner:** Creator of the Change. The current user is entered by default.

---

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

---

- **Requested By:** Stakeholder requesting the Change.

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

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

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

- **Requested Date, Planned Start Date, Planned End Date:**

- Click on the calendar icon and enter the date.

The screenshot shows a form with the following fields: Requested Date, Change Type, Planned Start Date, Planned End Date, State, and Approval. A calendar for February 2025 is displayed over the Planned Start Date field. The calendar shows the days of the week (So, Mo, Di, Mi, Do, Fr, Sa) and the dates (26, 27, 28, 29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 1). A red box highlights a search icon in the top right corner of the form.

▪ **Change Type:**

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

|                    |              |
|--------------------|--------------|
| Change Type        | --Select--   |
| Planned Start Date | ✓ --Select-- |
| Planned End Date   | Scope        |
| State              | Schedule     |
|                    | Cost         |
|                    | None         |

▪ **State:**

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

|          |              |
|----------|--------------|
| State    | --Select--   |
| Approval | ✓ --Select-- |
| Priority | Active       |
| Risk     | Postponed    |
|          | Closed       |

▪ **Approval:**

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

|          |                     |
|----------|---------------------|
| Approval | Not Yet Requested   |
| Priority | --Select--          |
| Risk     | ✓ Not Yet Requested |
| Impact   | Requested           |
|          | Approved            |
|          | Rejected            |

▪ **Priority:**

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

|                     |              |
|---------------------|--------------|
| Priority            | --Select--   |
| Risk                | ✓ --Select-- |
| Impact              | Critical     |
| Cost Impact         | High         |
|                     | Moderate     |
|                     | Low          |
| Additional Comments |              |

▪ **Risk:**

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

|                     |            |
|---------------------|------------|
| Risk                | None       |
| Impact              | --Select-- |
| Cost Impact         | Very High  |
|                     | High       |
| Additional Comments | Moderate   |
|                     | Low        |
|                     | ✓ None     |

▪ **Impact:**

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

|                     |              |
|---------------------|--------------|
| Impact              | --Select--   |
| Cost Impact         | ✓ --Select-- |
|                     | High         |
| Additional Comments | Medium       |
|                     | Low          |

▪ **Cost Impact:**

- Enter an amount.

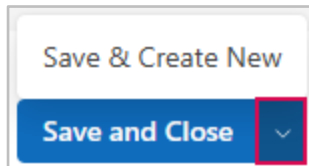
- *Additional Comments, Work Notes, Benefits, Change Plan, Backout Plan, Test Plan:*

➤ 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.

Active Changes ▾

|                          |           |
|--------------------------|-----------|
| <input type="checkbox"/> | Title ↑ ▾ |
| <input type="checkbox"/> | Change 1  |

Or

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

Active Changes ▾ 2 Edit Ac

| <input type="checkbox"/>              | Title ▾  | Created On ▾ | Approval ▾ | Change Type ▾ | State ▾ | Assigned To ▾    | Priority ▾ |
|---------------------------------------|----------|--------------|------------|---------------|---------|------------------|------------|
| 1 <input checked="" type="checkbox"/> | Change 1 |              | Requested  | Scope         | Active  | PPP Project M... | Moderat    |

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

← Save Save & Close De

**Change 1 - Saved**

Change

General

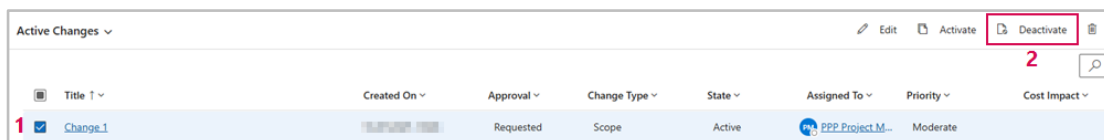
Title \* Change 1

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

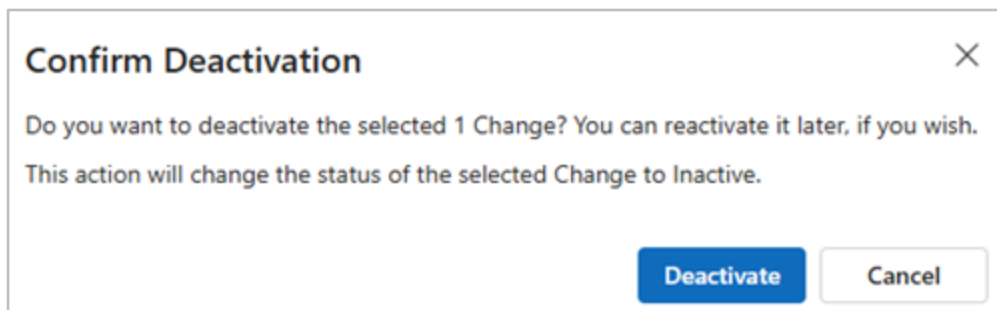
## 12.3 Deactivate and Activate Changes

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.

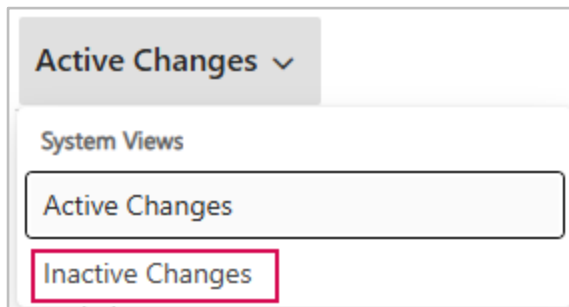


By default, all active and inactive Changes are listed in the table.

**Display only inactive changes:**

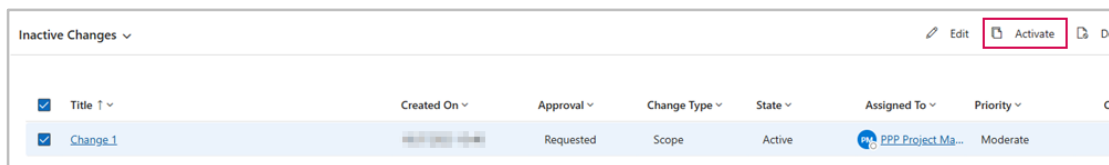
- Go to *Active Changes*.
- Click the down arrow.

- Click on *Inactive Changes*.

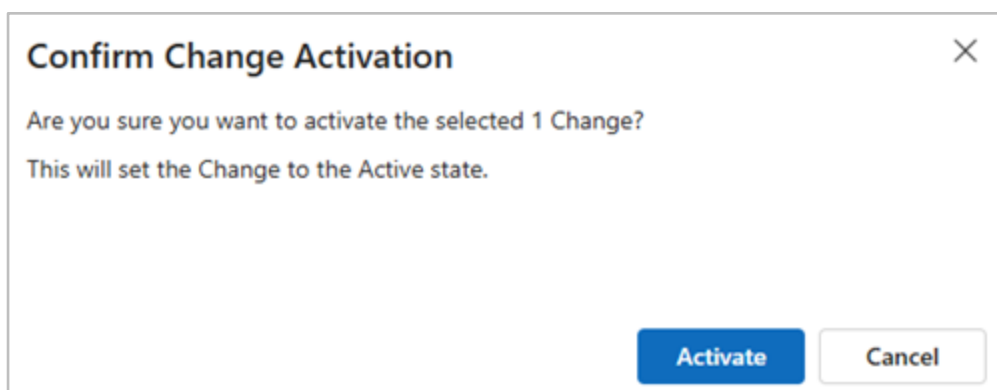


### Activate Changes:

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



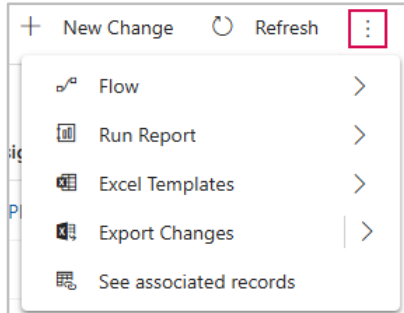
- ▶ The *Confirm Change Activation* field opens.
- Click on *Activate* to activate the change.



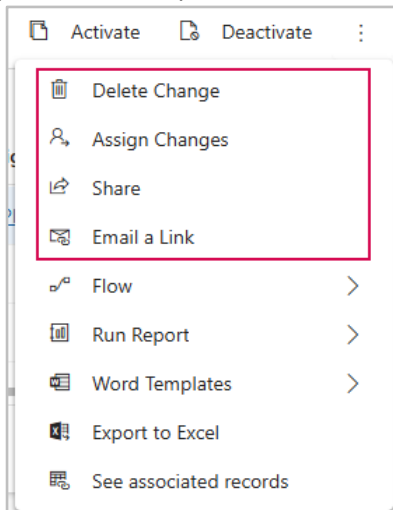
## 12.4 Additional Commands for Changes

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.

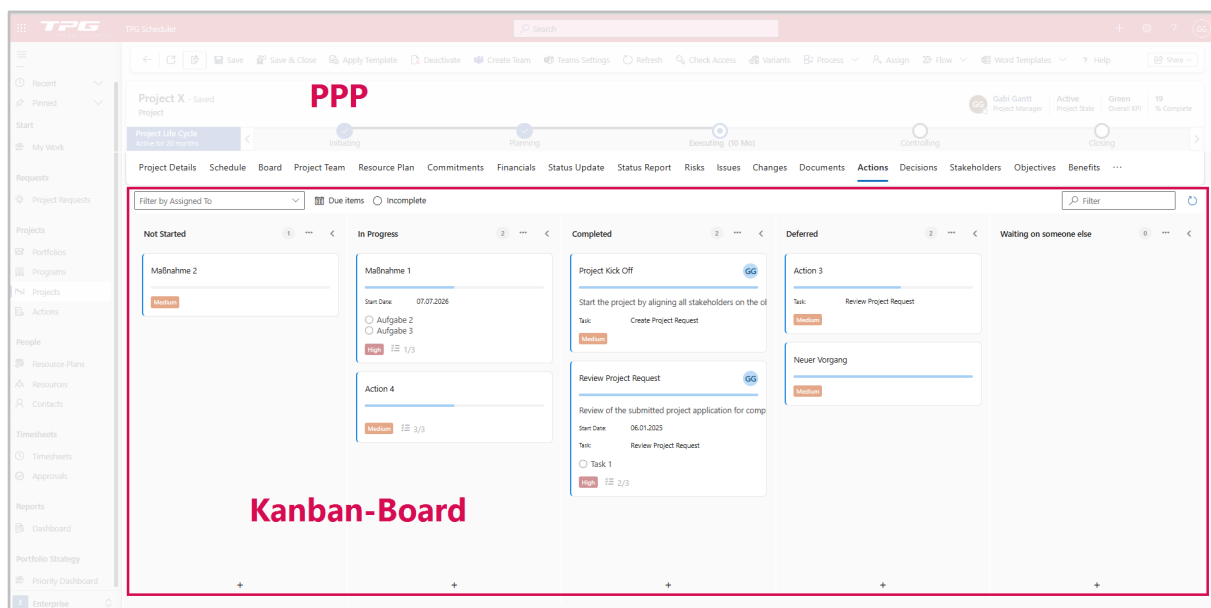
- *Assign Changes*: Changes the owner of the selected Change.
- *Share*: Shares the Change with selected individuals or teams without changing ownership.

- *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.



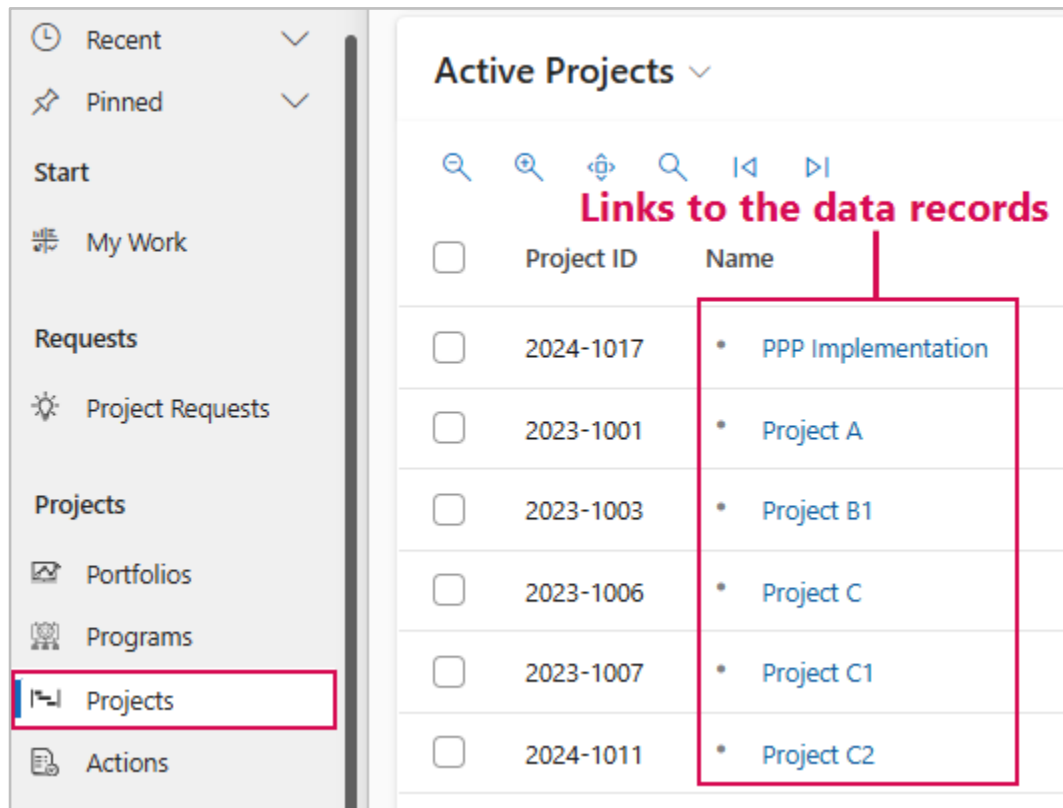
### 13.1 Actions - current Project

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

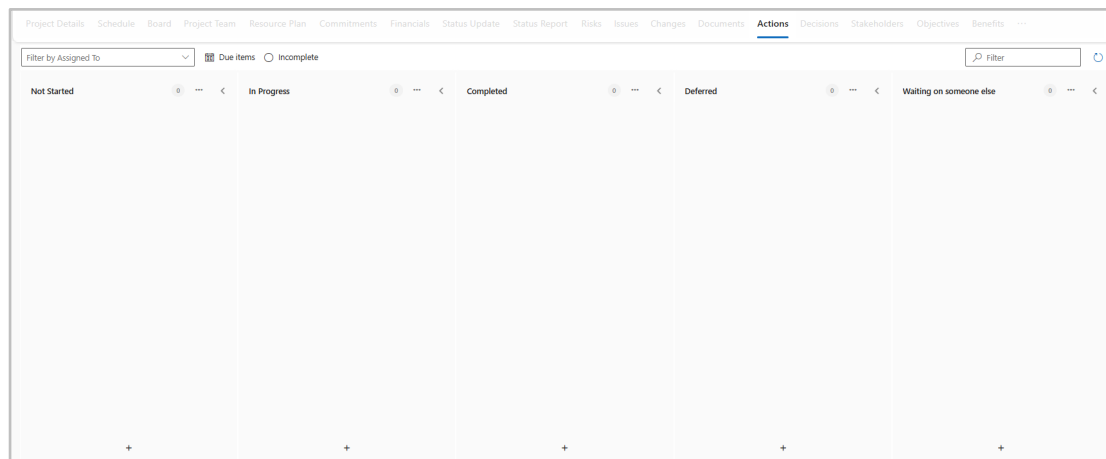
Open the project in which you want to create actions:

- Click *Projects* in the navigation bar. ➤ A list of all active projects will open.

➤ Select the desired project from the list and click the link to the record. ► The project will open.



➤ Click the **Actions** tab. ► The Kanban board appears.



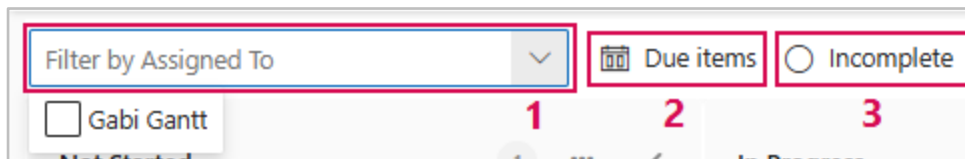
The actions are grouped by state in columns. There are the following states:

- **Not Started:** The action has not yet been started.
- **In Progress:** The action is being processed.
- **Completed:** The action has been completed.

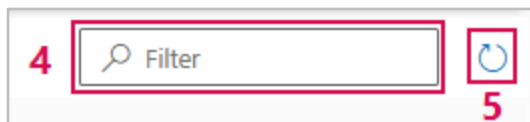
- *Deferred*: The action is on hold.
- *Waiting on someone else*: The action must be processed by someone.

The following filter options are available:

- Filter tasks by assigned persons. (1)
- *Due items*: Only tasks that are overdue are displayed. (2)
- *Incomplete*: Only tasks that are incomplete are displayed. (3)



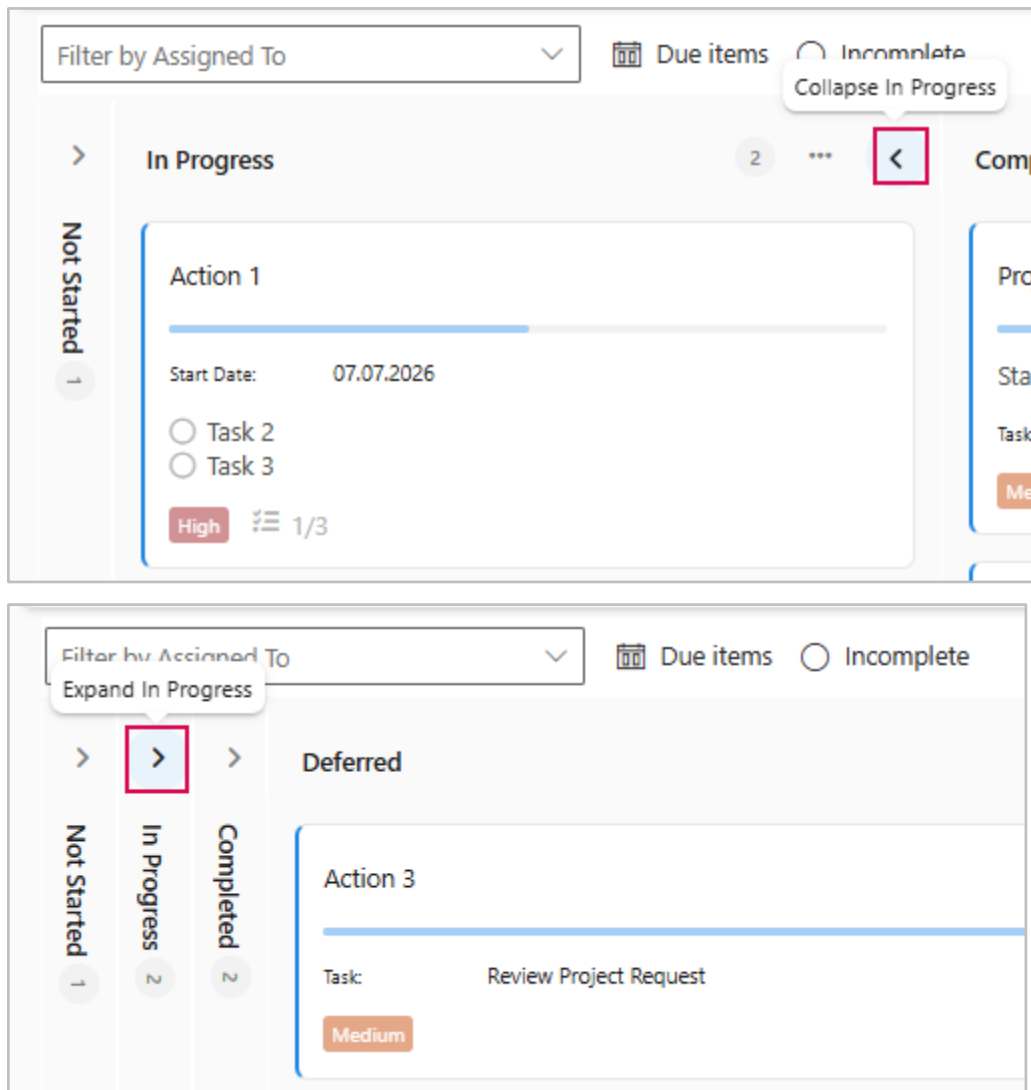
- Filter tasks by name and/or content. (4)
- *Refresh*: The Kanban board is refreshed. (5)



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](#) <sup>63</sup>.
- The *Schedule* shows how many actions are assigned to the task and whether these actions are open or completed.

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

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

| Actual Hours | Actions | New |
|--------------|---------|-----|
|              |         |     |
|              |         |     |
|              |         |     |
|              |         |     |
|              |         |     |
|              |         |     |
|              |         |     |
|              |         |     |
|              |         |     |

1 open, 1 complete

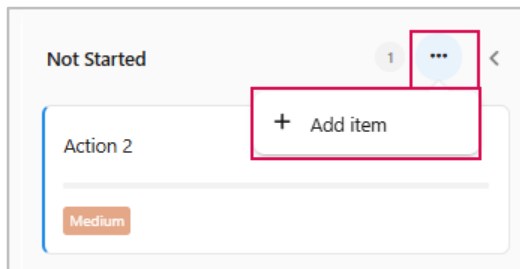
1 / 2

### 13.1.1 Create Actions

There are two ways to create an action:

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

➤ Click on *Add item*.

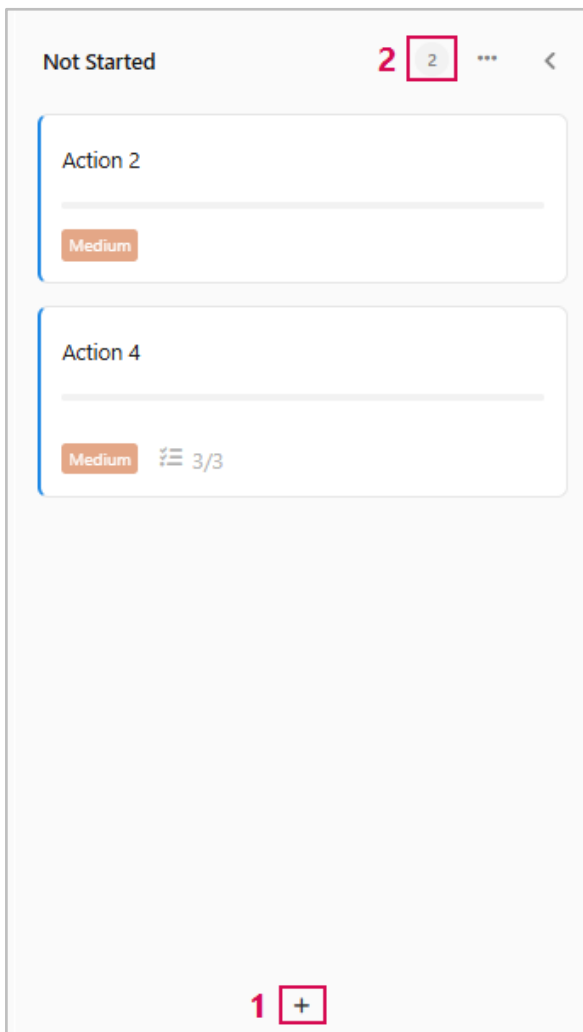


Or

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

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

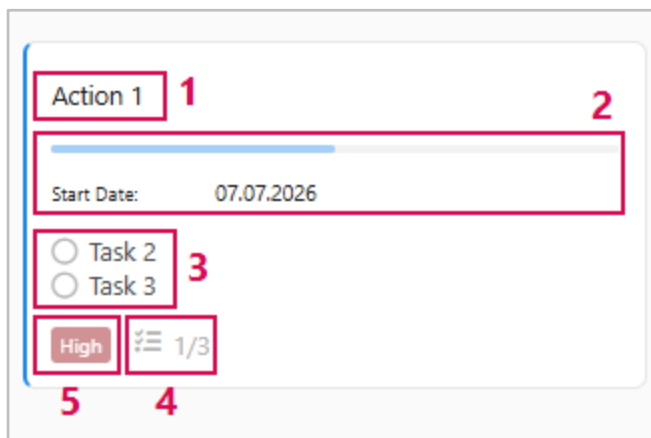
▶ The number of actions in the state column is updated automatically. (2)



### 13.1.2 Edit Actions

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

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



#### Change the name of the action:

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

- Double-click on *New task*. ► 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

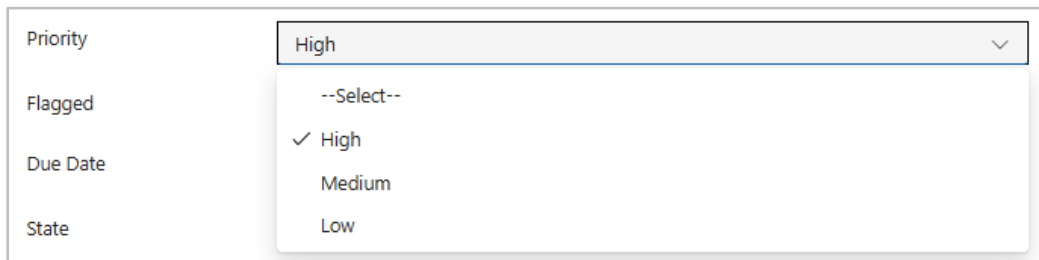
- Right-click on the action. ► A drop-down menu opens.
- Click on *Edit item*.

- ▶ The form for editing the action opens.

Fill in the following fields:

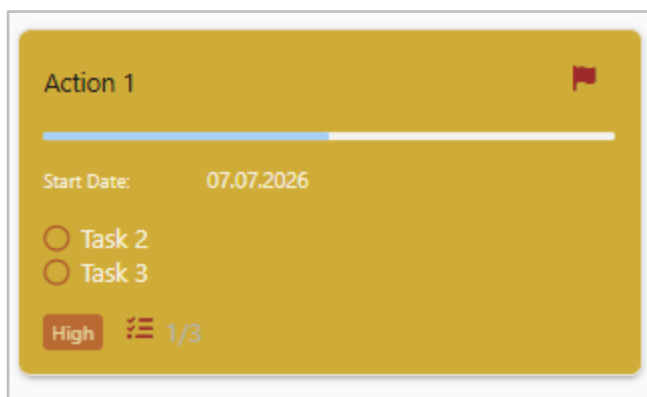
- **Title:** Name of the action
  - Click in the text field to edit the name of the action.
- **Project:** Project to which the action is assigned.
  - Click on the search icon (magnifying glass) in the text field to select another project in the drop-down menu to which you want to assign the action.
- **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*.



A screenshot of a user interface showing a list of fields on the left: Priority, Flagged, Due Date, and State. The 'Priority' field is selected, and a dropdown menu is open to its right. The dropdown menu contains the following options: --Select--, High (with a checkmark), Medium, and Low.

- **Flagged:** Mark the action as important. If this setting is enabled, the action is marked with a red flag and the background turns gold.



A screenshot of an 'Action 1' card. The card has a gold background and a red flag icon in the top right corner. It features a progress bar, a 'Start Date' of 07.07.2026, and two tasks listed below: 'Task 2' and 'Task 3'. At the bottom left, there is a 'High' priority label and a '1/3' indicator.

➤ Click the slider to mark the action as important.



A screenshot of a 'Flagged' toggle switch. The switch is currently turned on (blue) and is labeled 'Yes'.

- **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.

The screenshot shows a form with a 'State' dropdown menu. The menu is open, displaying a list of states: 'In Progress' (which is the current selection), '--Select--', 'Not Started', 'In Progress' (with a checkmark), 'Completed', 'Deferred', and 'Waiting on someone else'.

▪ **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.

The screenshot shows a 'Todos' list. It contains three items: 'Task 1' (which has a checked checkbox labeled 3), 'Task 2' (which is highlighted in grey), and 'Add an item' (labeled 1). A delete icon (labeled 2) is at the end of the 'Task 2' row. A vertical ellipsis (labeled 4) is to the left of 'Task 2', indicating a drag handle for reordering.

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

**Action 1**

Save Save & Close Deactivate Delete Refresh Share

**Action 1 - Saved**  
Action Item

**General**

Project **Project X**

Owner **Gabi Gantt (Offline)**

Assigned To ---

% Complete 50 %

Description ---

Priority High

Flagged No

Due Date dd/MM/yyyy

State In Progress

Task ---

Start Date 07.07.2026

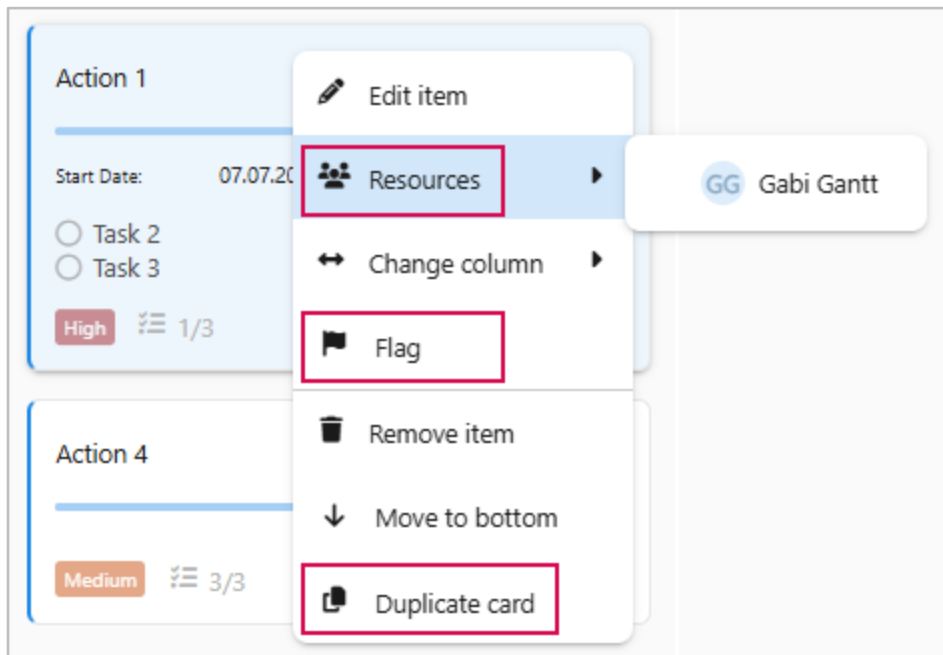
Todos ☒ Task 1  
☐ Task 2  
☐ Task 3  
☐ Add an item

### Additional Editing Options

Right-click on the task to access additional editing options in the dropdown menu:

- **Resources:** Add resources to the task.
- **Flag:** Mark the task as important (flagged).

- **Duplicate Card:** The task is duplicated.

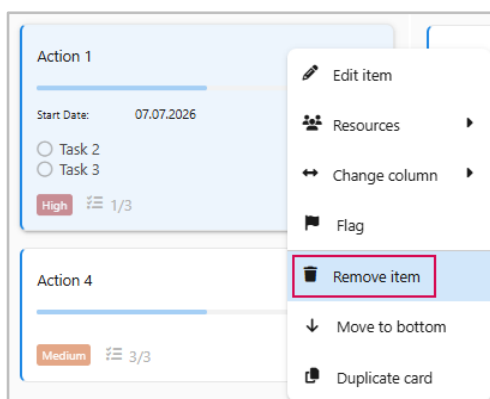


### 13.1.3 Delete or move Actions

On the Kanban board in the Action tab, you can delete actions, move them within a column, and move actions to a different column to assign them a different status. (see [Actions - current Project](#)<sup>172</sup>)

#### Delete action:

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

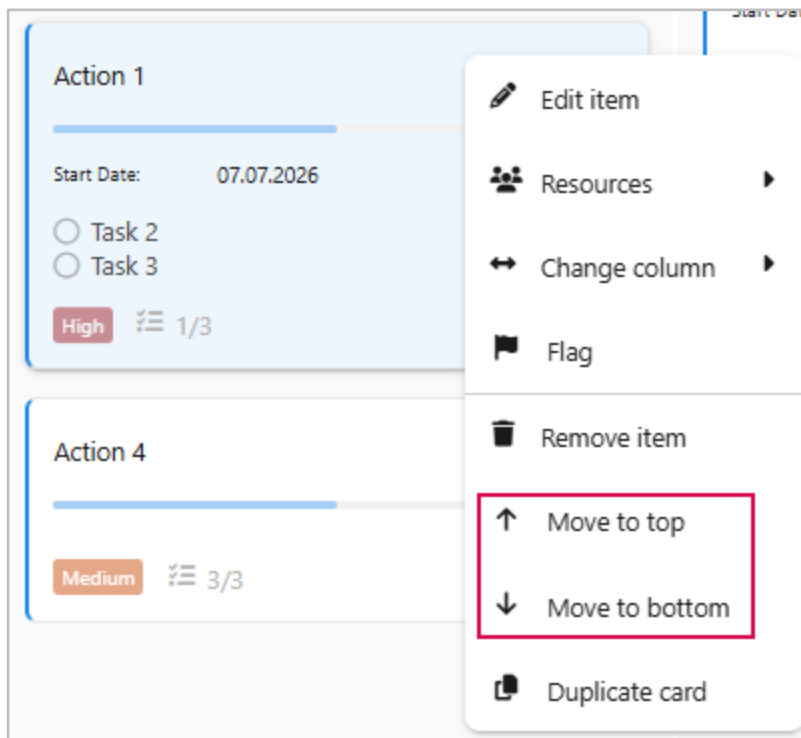


### Moving actions within a column:

- Select the actions you want to move.
- Use drag-and-drop to move the action to the desired position within the column.

Or

- Right-click the action. ► A drop-down menu opens.
- Click *Move to top* or *Move to bottom* to move the action up or down.



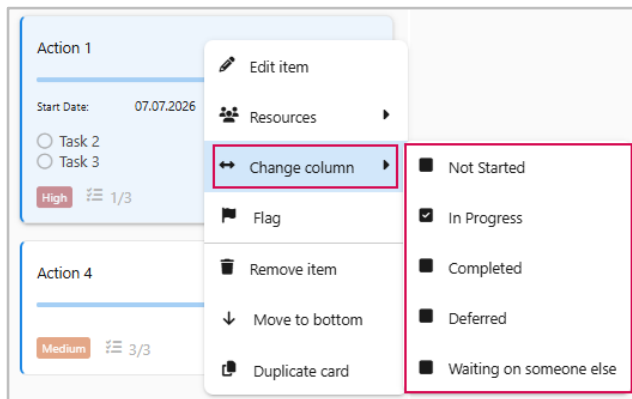
### Move actions to another column:

- Select the action you want to move.
- Use drag-and-drop to move the action to the desired column.

Oder

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

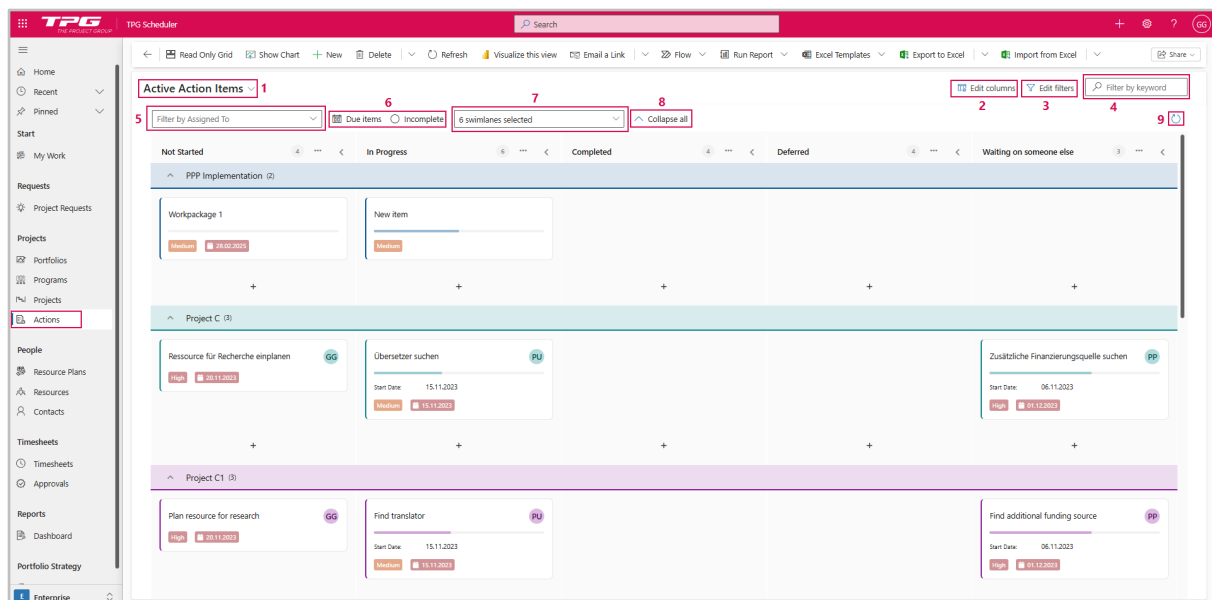
➤ Click on the desired state.



## 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.

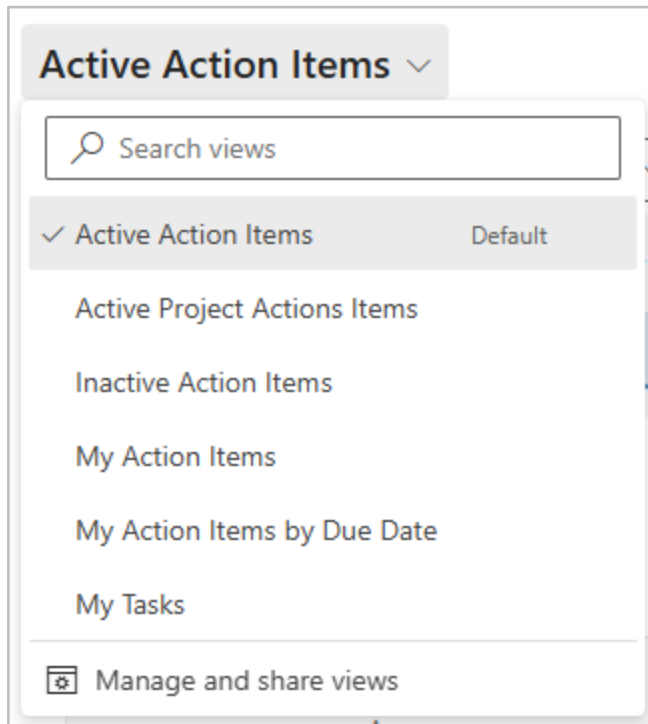
➤ Click on *Actions* in the navigation bar. ► By default, all active action items are displayed on the Kanban board.



There are options available to you to customize the view:

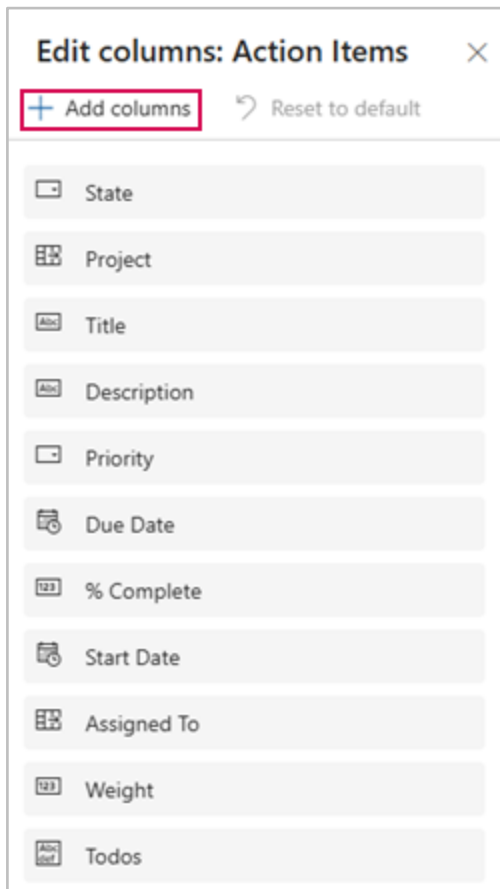
- Selection menu of displayed Actions (1):

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

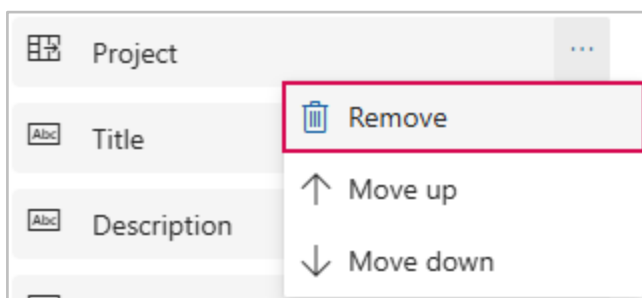


- *Edit columns* (2): Add columns and change the order of the columns using drag & drop.
  - Click on *Edit columns*. (2) ► A form opens.

- 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.

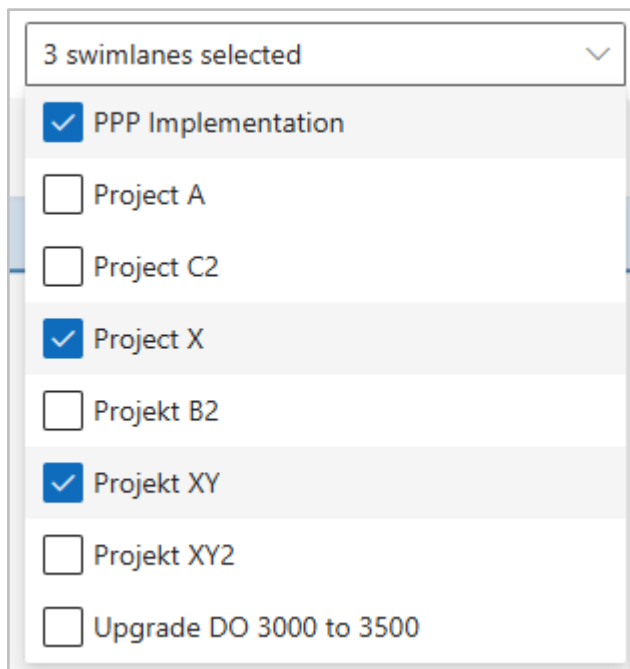
The screenshot shows the 'Edit filters: Action Items' dialog. At the top, there are buttons for 'Reset to default' and 'Delete all filters'. Below, a filter tree is visible. The first filter is 'Status' with the operator 'Equals' and value 'Active'. The second filter is 'Project (Projects)' with the operator 'Contains data'. Inside the 'Project (Projects)' filter, there is a sub-filter 'Is Variant' with the operator 'Does not equal' and value 'Yes'. A red box highlights the '+ Add' button and its dropdown menu, which contains the following options: 'Add row', 'Add group', and 'Add 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.

This screenshot shows the same dialog box, but with a red box highlighting the three dots next to the 'Status' filter. Another red box highlights the 'Delete' button in the dropdown menu that appears when the three dots are clicked. The 'Delete' button is located at the bottom of the dropdown menu, next to a trash icon.

- 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.
- *Due Items and Incomplete* (6): Show only tasks on the Kanban board that are due or incomplete.
- *Swimlanes selected* (7): Display action items of a project in rows (swimlanes) below each other on the Kanban board. (see [Actions - show across projects](#) <sup>191</sup>)
  - Click on the *swimlanes selected* field. ▶ A drop-down menu opens.
  - Select the projects that you want to display on the Kanban board.



- **Collapse All/Expand All (8):** Collapse or expand all items.

Active Action Items ▾

Filter by Assigned To ▾

Due items

Incomplete

6 swimlanes selected ▾

Expand all

Not Started 4 ▾ <

In Progress 6 ▾ <

Completed

▾ PPP Implementation (2)

▾ Project C (3)

▾ Project C1 (3)

▾ Project X (8)

▾ Project XY (1)

▾ Update DO 3000 (4)

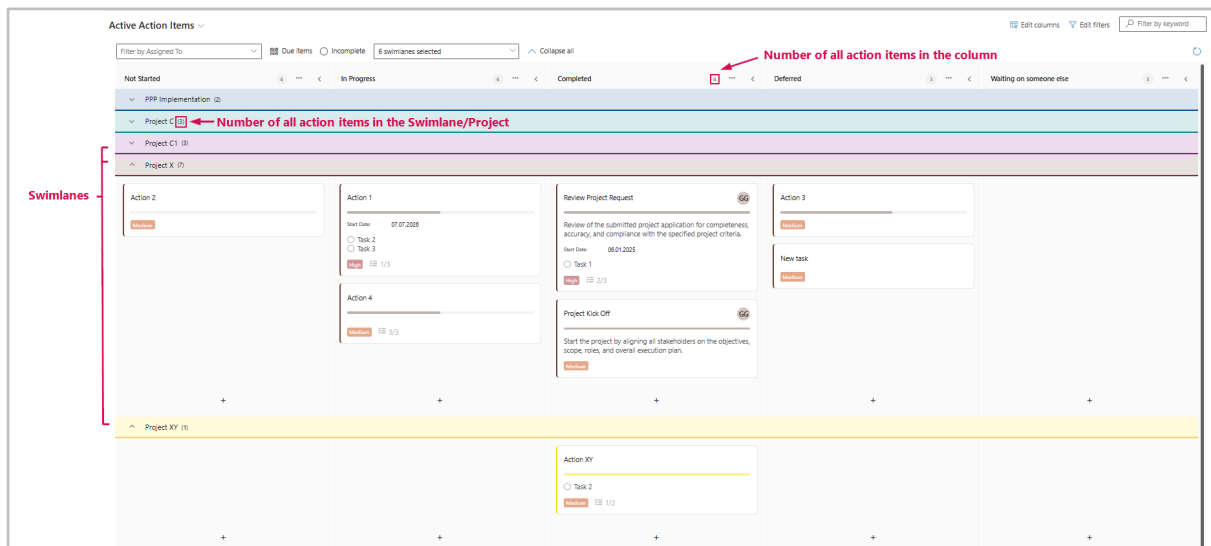
- **Refresh (9):** The Kanban board is refreshed.

### 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.

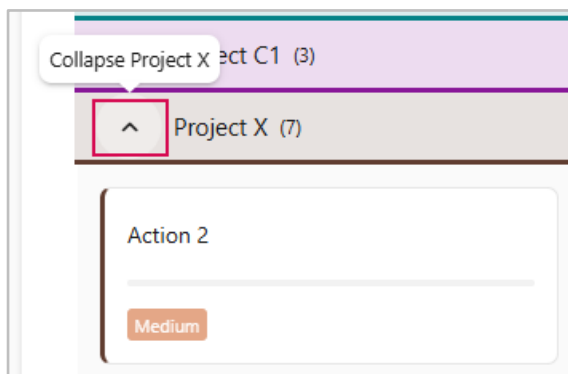
Swimlane = line in which all action items of a project are displayed.

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



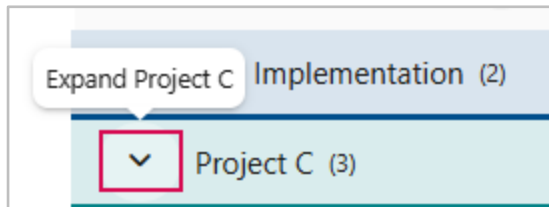
For a better clarity, you can expand and collapse the action items of a swimlane:

- 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](#)<sup>172)</sup>)
- 

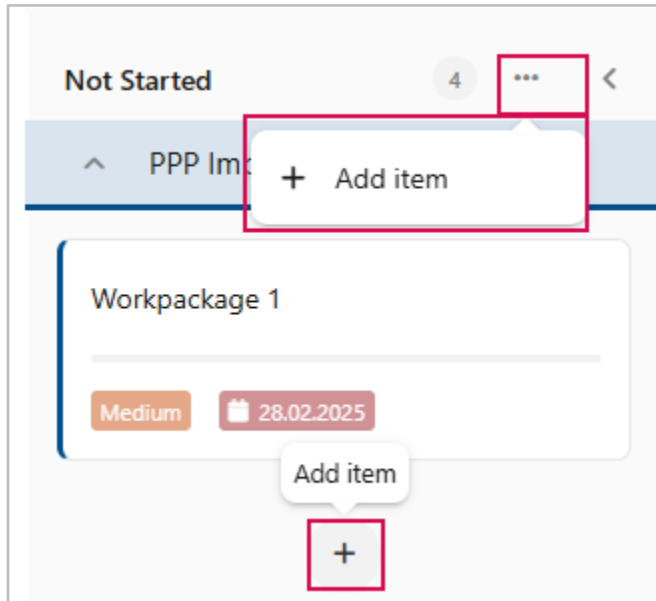
### 13.2.2 Actions - create and edit across projects

#### 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](#)<sup>193)</sup>)
-



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](#) <sup>178</sup>.

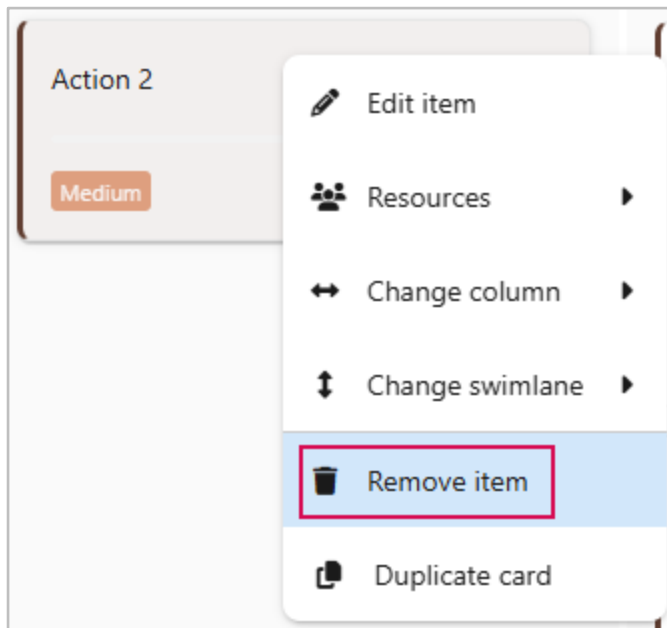
### 13.2.3 Actions - delete and move across projects

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:**

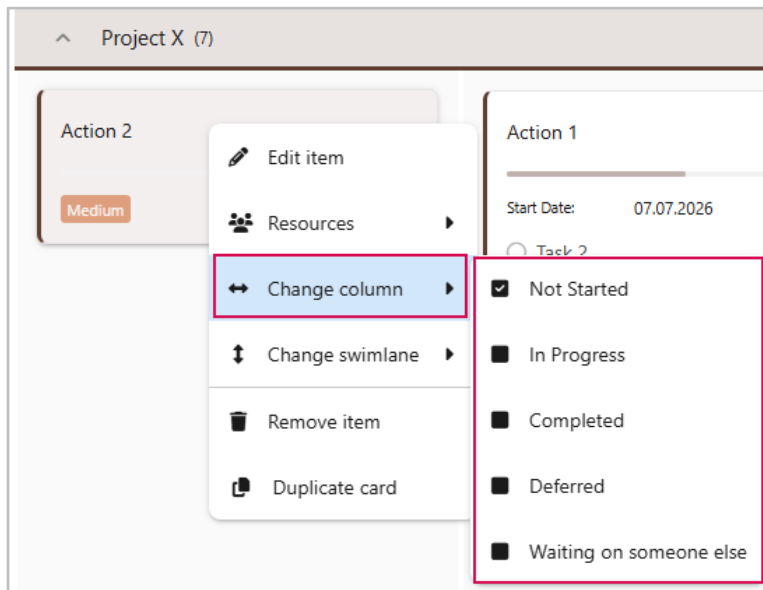
There are several options for moving actions. The actions can be moved within a column and a swimlane or to other columns and swimlanes.

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

Or

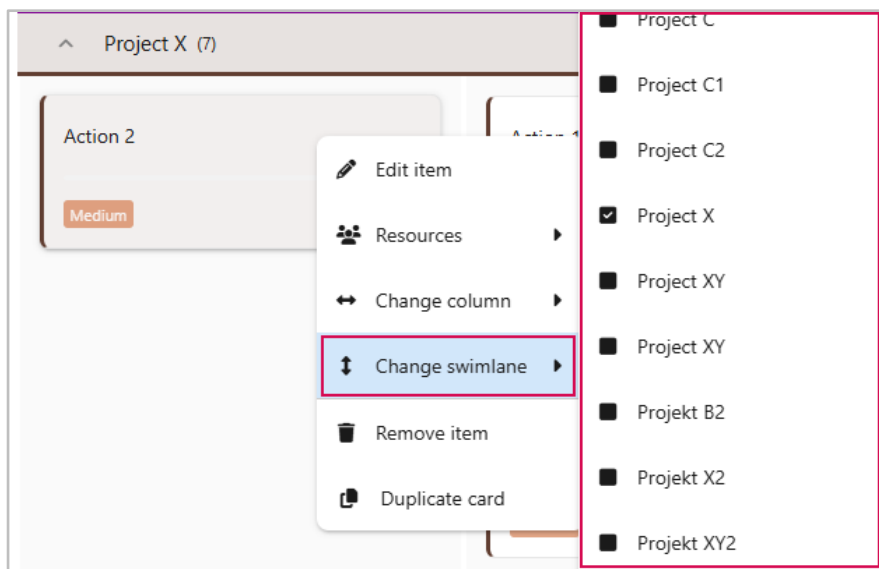
- Right-click on the action. ► A drop-down menu opens.
- Go to *Change column*.

- 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.



### Moving Tasks with Linked Activities:

Tasks with a linked task cannot be moved to a different swimlane or project.

This applies to:

- moving tasks via drag-and-drop,
- changing the swimlane via the context menu.

If a move is not permitted, a corresponding warning message is displayed.

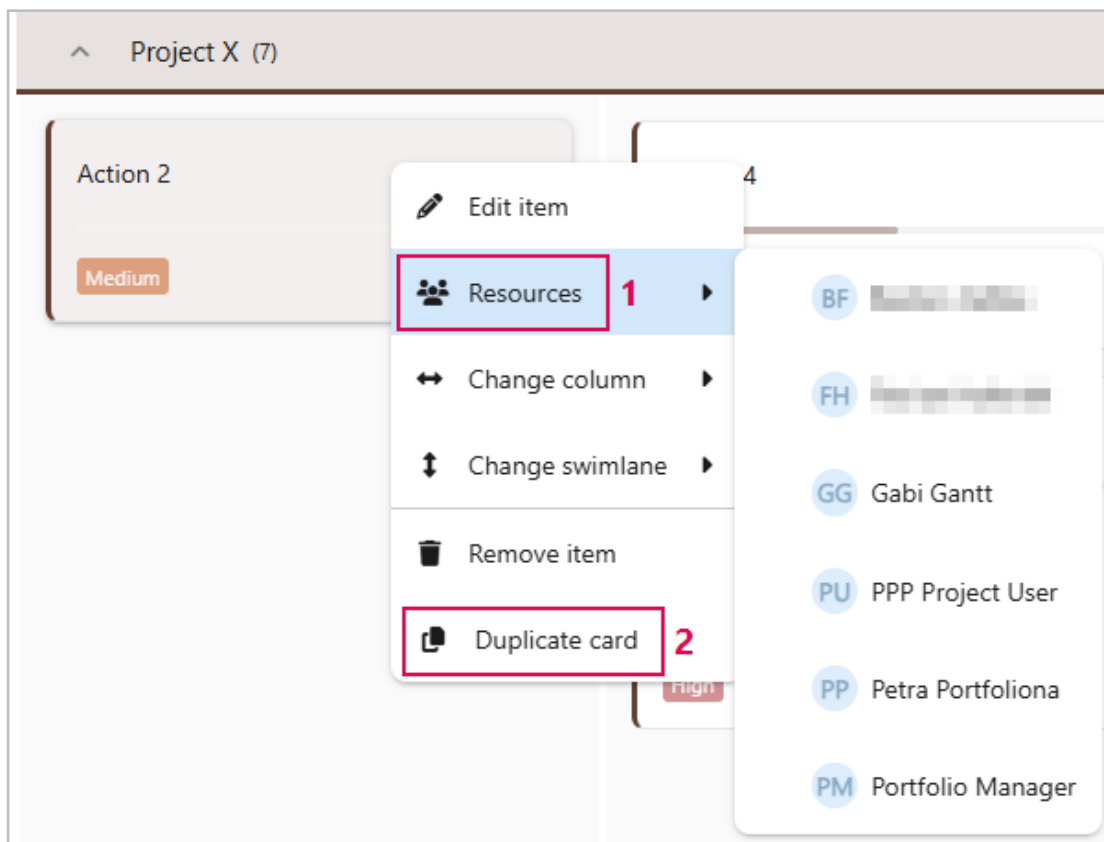
Actions with linked tasks cannot be moved between projects:  
Project Kick Off

- 
- If multiple tasks are moved at the same time and the selection includes at least one task with a linked activity, the entire move operation is canceled. All tasks remain in their original positions.
- 

### Additional Editing Options

Right-click on the task to access additional editing options in the drop-down menu:

- *Resources (1)*: Add resources to the task.



- *Duplicate Card (2)*: The task is duplicated.

## 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](#)  198
- [Edit Decisions](#)  202
- [Deactivate and Activate Decisions](#)  203
- [Use additional Commands for Decisions](#)  205

### 14.1 Add Decisions

To add a *Decision*, proceed as follows:

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

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

Quick Create: Decision

×

General

Decision \* ---

Project \* Project X ×

Impact ---

Details ---

Priority --- ▾

Source --- ▾

State --- ▾

Owner \* PM PPP Project Manager (Offline) ×

Approval

Approved Date ---

Executive Reporting ☐ No

Category --- ▾

Target Date ---

Resulting Actions ---

Save and Close ▾

Cancel

- Fill out the form:

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

▪ **General:**

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

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

▪ **Impact, Details:**

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

▪ **Priority:**

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

Priority

Source

State

Owner \*

--Select--

✓ --Select--

Critical

High

Moderate

Low

▪ **Source:**

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

Source

State

Owner \*

Approval

--Select--

✓ --Select--

Meeting

Conversation

Self

▪ **State:**

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

State

Owner \*

Approval

Approved Date

Executive Reporting

Category

--Select--

✓ --Select--

Not Started

Active

On Hold

Deferred

Completed

Rejected

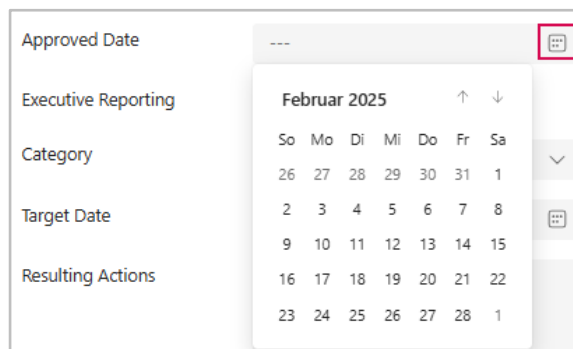
▪ **Owner:** Creator of the Decision. By default, the current user is entered.

- 
- 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.

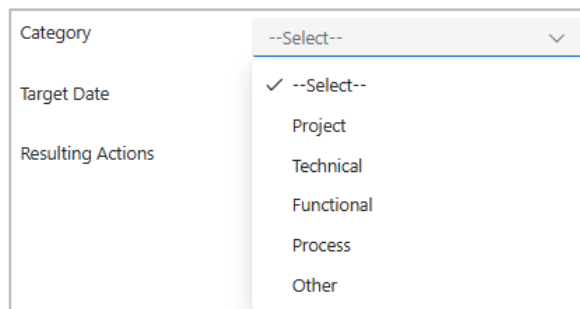


- **Executive Reporting:** Create a report for management. *No* is selected by default..

- 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.

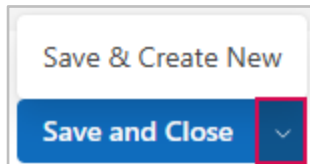
- **Resulting Actions:**

- 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:

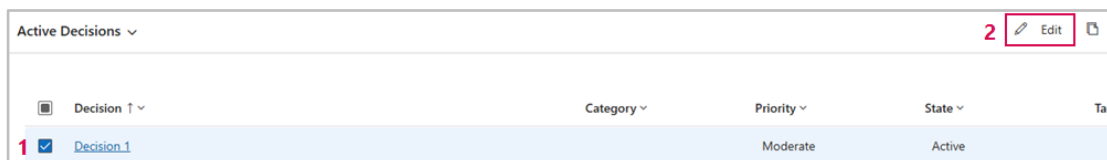
➤ Click on the preview in the *Decision* column. ▶ The form for editing the Decision opens.



Or

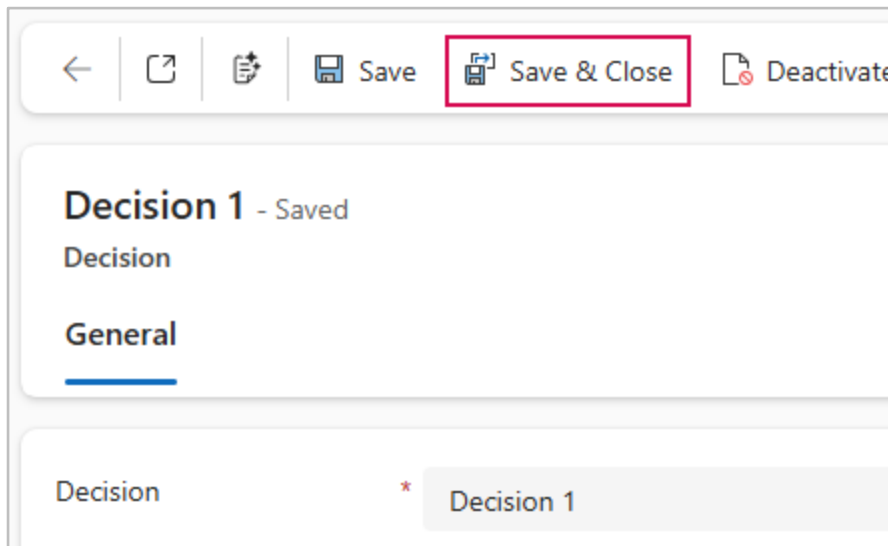
➤ Click on the row of the desired Decision to select it. (1)

➤ Click on *Edit*. (2)



➤ Enter the desired changes in the form.

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

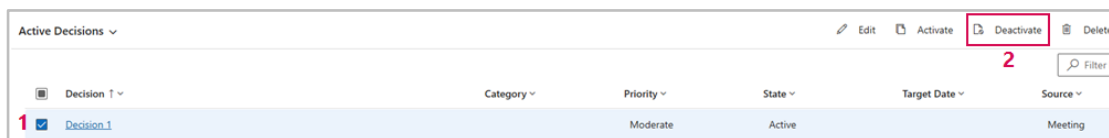


- ▶ Only Decisions with the status Active can be edited. Deactivated Decisions are locked for editing.

## 14.3 Deactivate and Activate Decisions

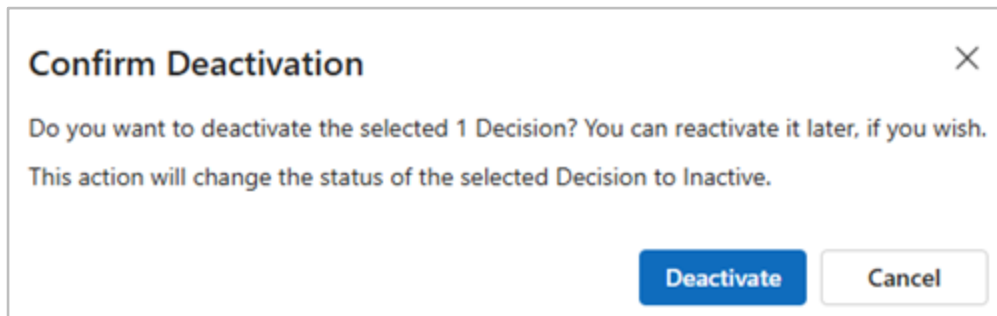
Decisions are active by default. You can deactivate Decisions:

- 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.

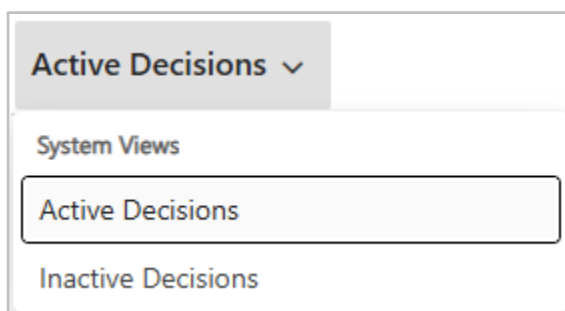
- Click *Deactivate* to deactivate the Decision.



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

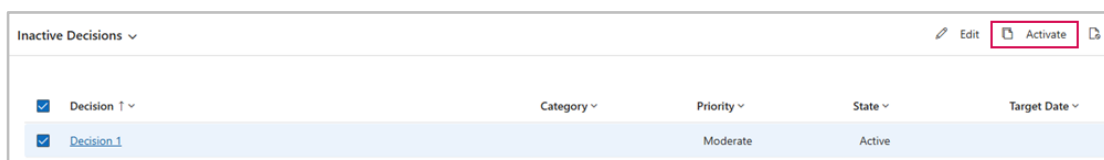
#### Display only inactive Decisions:

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



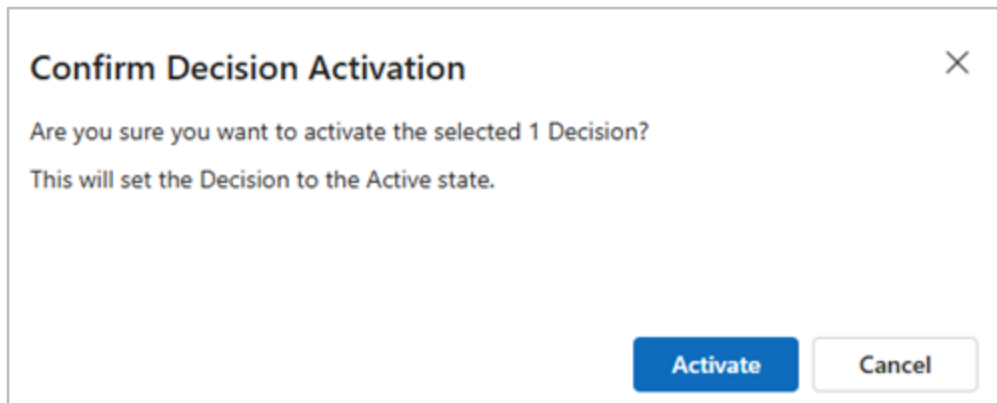
#### Activate Decisions:

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



- The *Confirm Decision Activation* field opens.

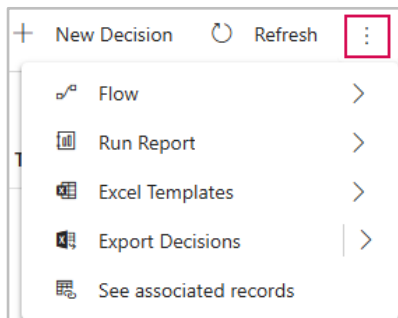
- Click on *Activate* to activate the Decision.



## 14.4 Additional Commands for Decisions

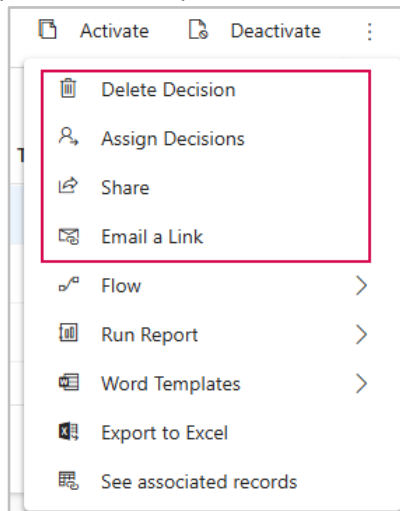
Above the *Active Decisions* table, there are additional commands that you can use:

- 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](#)  207
- [Edit Stakeholders](#)  211
- [Deactivate and Activate Stakeholders](#)  212
- [Use additional Commands for Stakeholders](#)  213

### 15.1 Add Stakeholders

To add a *Stakeholder*, proceed as follows:

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

|                                                                                                                         |                    |                |                       |             |               |             |                    |
|-------------------------------------------------------------------------------------------------------------------------|--------------------|----------------|-----------------------|-------------|---------------|-------------|--------------------|
| All Stakeholders ▾                                                                                                      |                    |                |                       |             |               |             |                    |
| <a href="#">+ New Stakeholder</a>  |                    |                |                       |             |               |             |                    |
| <input type="checkbox"/>                                                                                                | Stakeholder Name ▾ | Project Role ▾ | Organization Member ▾ | Influence ▾ | Involvem... ▾ | Supporter ▾ | Support Criteria ▾ |
| <input type="checkbox"/>                                                                                                | PPP Project User   | End User       | Yes                   | Low         | High          | Yes         | Yes                |

Quick Create: Stakeholder

×

General

Organization Member

☒ Yes

Stakeholder User

\*

---

🔍

Project

\*

🏠 Project X

×

🔍

Project Role

---

▼

Influence

☐

 Low

Involvement

☐

 Low

Supporter

---

▼

Support Criteria Met

---

▼

Support Criteria

---

Save and Close

▼

Cancel

- 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*.

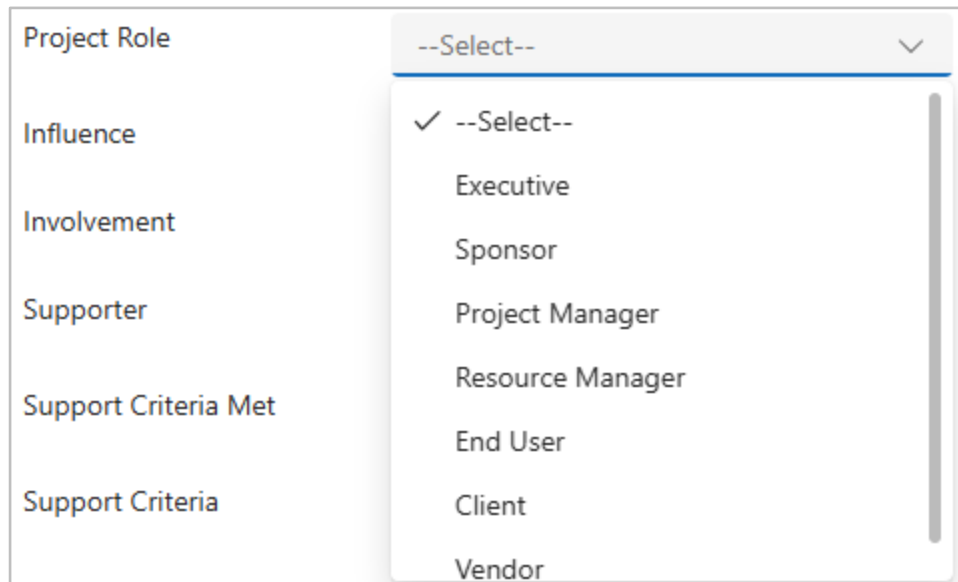
- **Stakeholder User:**

- 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.



The screenshot shows a web form with several labels: 'Project Role', 'Influence', 'Involvement', 'Supporter', 'Support Criteria Met', and 'Support Criteria'. The 'Project Role' label is highlighted, and its corresponding dropdown menu is open. The dropdown menu has a search bar with the placeholder text '--Select--' and a list of roles: '--Select--' (with a checkmark), 'Executive', 'Sponsor', 'Project Manager', 'Resource Manager', 'End User', 'Client', and 'Vendor'. A vertical scrollbar is visible on the right side of the dropdown list.

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

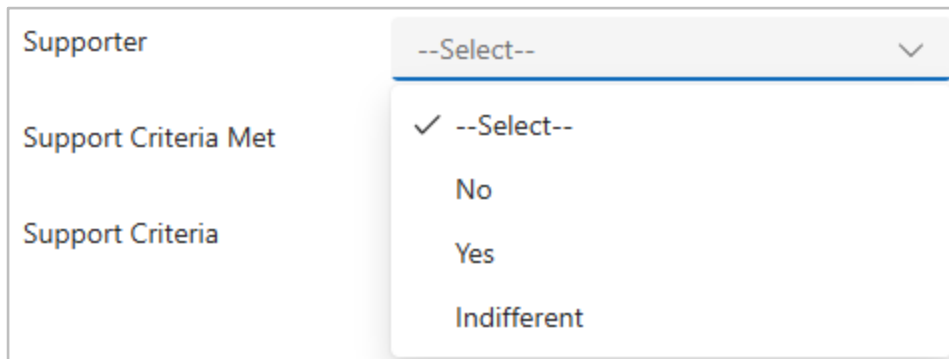
- Click on the slider to select *High*.

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

- Click on the slider to select *High*.

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

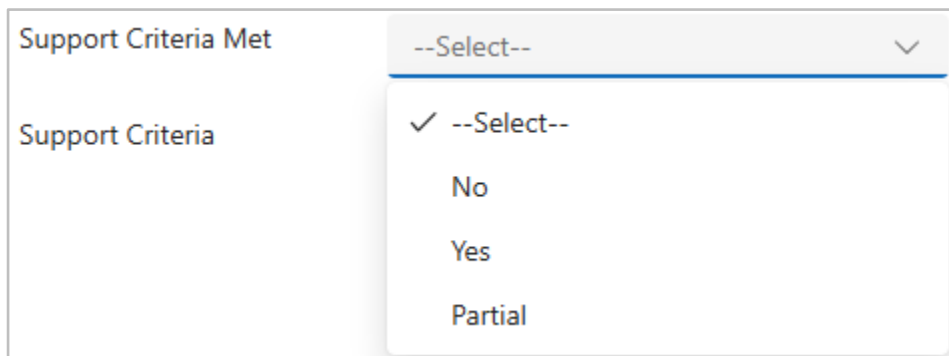
- Click in the field and select the supporter from the drop-down menu.



A screenshot of a form with three fields: 'Supporter', 'Support Criteria Met', and 'Support Criteria'. The 'Supporter' field is active, and a dropdown menu is open, showing the following options: '--Select--', '✓ --Select--', 'No', 'Yes', and 'Indifferent'.

- *Support Criteria Met:*

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



A screenshot of a form with two fields: 'Support Criteria Met' and 'Support Criteria'. The 'Support Criteria Met' field is active, and a dropdown menu is open, showing the following options: '--Select--', '✓ --Select--', 'No', 'Yes', and 'Partial'.

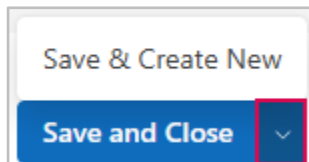
- *Support Criteria:*

- Enter a meaningful description of the support criteria.

- Click *Save and Close*.

Or

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



A screenshot of a button labeled 'Save and Close' with a small downward arrow icon to its right. Above the button, the text 'Save & Create New' is visible.

- ▶ 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.

All Stakeholders ▾

| <input type="checkbox"/> | Stakeholder Name ▾ |
|--------------------------|--------------------|
| <input type="checkbox"/> | PPP Project User   |

Or

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

All Stakeholders ▾ 2 Edit Activate

| <input type="checkbox"/>              | Stakeholder Name ▾ | Project Role ▾ | Organization Member ▾ | Influence ▾ | Involvement ▾ | Supporter ▾ | Support Criteria ▾ | Support C |
|---------------------------------------|--------------------|----------------|-----------------------|-------------|---------------|-------------|--------------------|-----------|
| 1 <input checked="" type="checkbox"/> | PPP Project User   | End User       | Yes                   | Low         | High          | Yes         |                    | Yes       |

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

← Save Save & Close Deactivate

**1001 - Saved**  
Stakeholder

**General**

Organization Member ☒ Yes

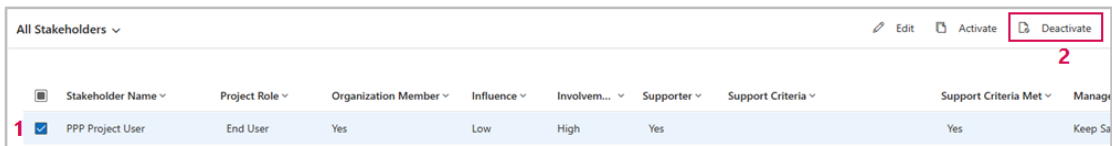
Stakeholder User \* [PPP Project User \(Offline\)](#)

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

## 15.3 Deactivate and Activate Stakeholders

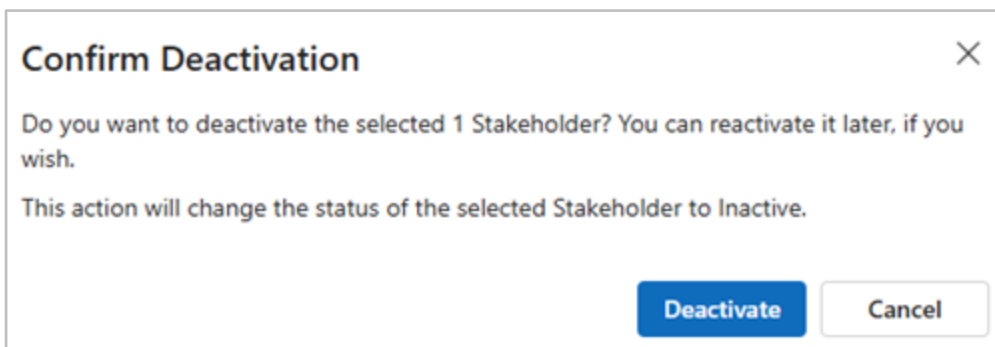
Stakeholders are active by default. You can deactivate Stakeholders:

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



The screenshot shows a table titled 'All Stakeholders' with columns: Stakeholder Name, Project Role, Organization Member, Influence, Involvement, Supporter, Support Criteria, Support Criteria Met, and Manage. The first row is highlighted in blue and contains the text 'PPP Project User', 'End User', 'Yes', 'Low', 'High', 'Yes', 'Yes', and 'Keep Sa'. Above the table, there are buttons for 'Edit', 'Activate', and 'Deactivate'. The 'Deactivate' button is highlighted with a red box and a red number '2'.

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

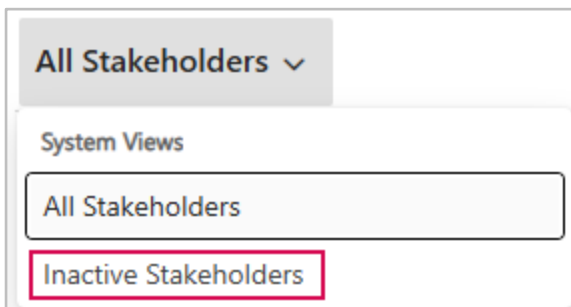


The screenshot shows a dialog box titled 'Confirm Deactivation' with a close button (X) in the top right corner. The text inside the dialog box reads: 'Do you want to deactivate the selected 1 Stakeholder? You can reactivate it later, if you wish. This action will change the status of the selected Stakeholder to Inactive.' At the bottom right, there are two buttons: 'Deactivate' (blue) and 'Cancel' (white).

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

**Display only inactive Stakeholders:**

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



The screenshot shows a dropdown menu for 'All Stakeholders'. The menu is open, showing a list of options under the heading 'System Views'. The options are 'All Stakeholders' and 'Inactive Stakeholders'. The 'Inactive Stakeholders' option is highlighted with a red box.

## Activate Stakeholders:

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

| Inactive Stakeholders ▾                                        |                |                     |             |               |                    |                 | ✎ Edit | 🔒 Activate | 🗑 Deact |
|----------------------------------------------------------------|----------------|---------------------|-------------|---------------|--------------------|-----------------|--------|------------|---------|
| <input checked="" type="checkbox"/> Stakeholder User ▾         | Project Role ▾ | Organization M... ▾ | Influence ▾ | Involvement ▾ | Support Criteria ▾ | Support Criteri |        |            |         |
| <input checked="" type="checkbox"/> PPP Project User (Offline) | End User       | Yes                 | Low         | High          |                    | Yes             |        |            |         |

- ▶ The *Confirm Stakeholder Activation* field opens.

- Click on *Activate* to activate the Stakeholder.

### Confirm Stakeholder Activation

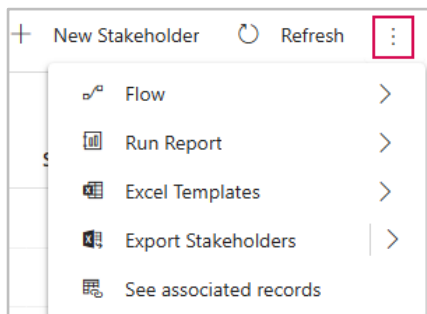
Are you sure you want to activate the selected 1 Stakeholder?  
This will set the Stakeholder to the Active state.

Activate
Cancel

## 15.4 Additional Commands for Stakeholders

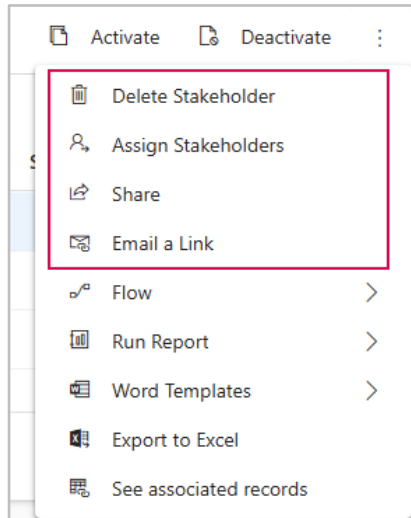
Above the *All Stakeholders* table, there are additional commands that you can use:

- 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**  215
- **Edit Objectives**  219
- **Deactivate and Activate Objectives**  220
- **Use additional Commands for Objectives**  221

### 16.1 Add Objectives

To add an Objective, proceed as follows:

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

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

Quick Create: Objective

×

General

Objective Title

\*

---

Project

\*

Project X ×

🔍

Owner

\*

PM PPP Project Manager (Offline) ×

🔍

Objective Description

---

Priority

---

▼

Assigned To

---

🔍

Objective Status

---

▼

Objective Type

---

▼

Save and Close

▼

Cancel

- 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.

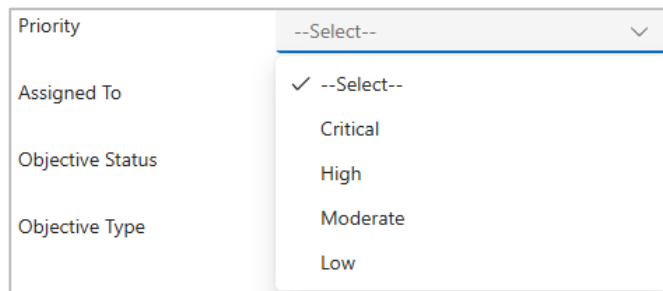
---

▪ **Objective Description:**

➤ Enter meaningful descriptions in the field.

▪ **Priority:**

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



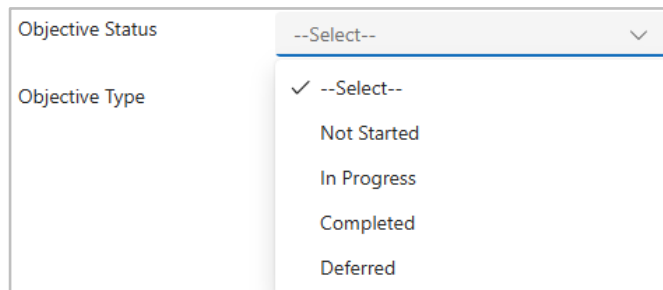
|                  |              |
|------------------|--------------|
| Priority         | --Select--   |
| Assigned To      | ✓ --Select-- |
| Objective Status | Critical     |
| Objective Type   | High         |
|                  | Moderate     |
|                  | Low          |

▪ **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:**

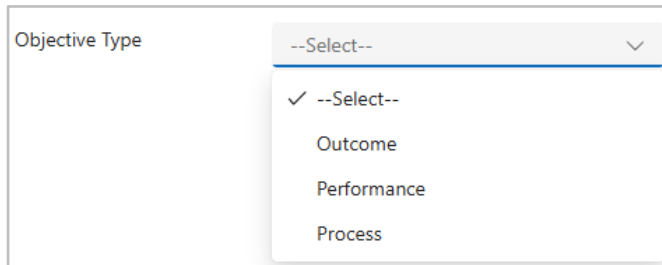
➤ Click in the field and select the status from the drop-down menu.



|                  |              |
|------------------|--------------|
| Objective Status | --Select--   |
| Objective Type   | ✓ --Select-- |
|                  | Not Started  |
|                  | In Progress  |
|                  | Completed    |
|                  | Deferred     |

▪ **Objective Type:**

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

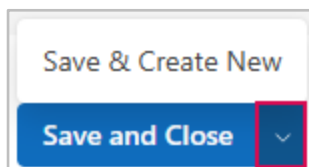


The screenshot shows a form field labeled 'Objective Type'. A dropdown menu is open, displaying the following options: '--Select--' (highlighted with a checkmark), 'Outcome', 'Performance', and 'Process'. The dropdown menu has a blue border and a small downward arrow icon on the right side.

- Click *Save and Close*.

Or

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



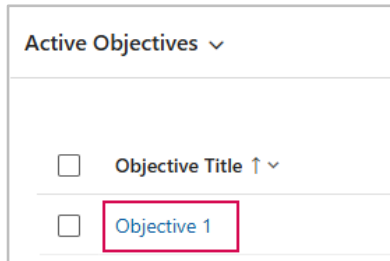
The screenshot shows a button labeled 'Save & Create New'. Below this label is a blue button labeled 'Save and Close' with a small downward arrow icon on the right side. The 'Save and Close' button is highlighted with a red border.

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

## 16.2 Edit Objectives

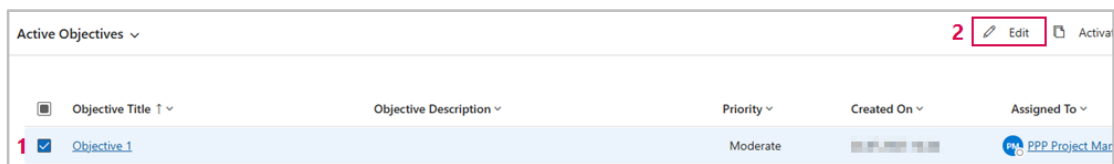
An Objective can be edited as follows:

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

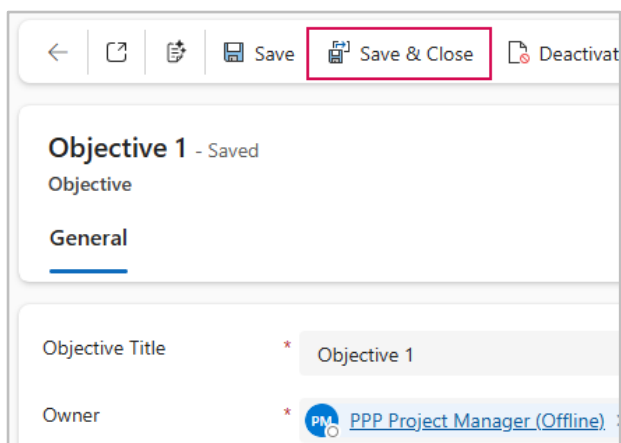


Or

- 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.

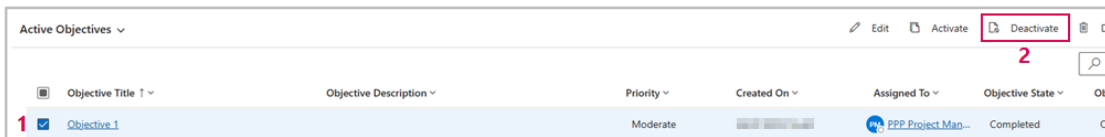


- 
- Only Objectives with the status Active can be edited. Deactivated Objectives are locked for editing.
-

## 16.3 Deactivate and Activate Objectives

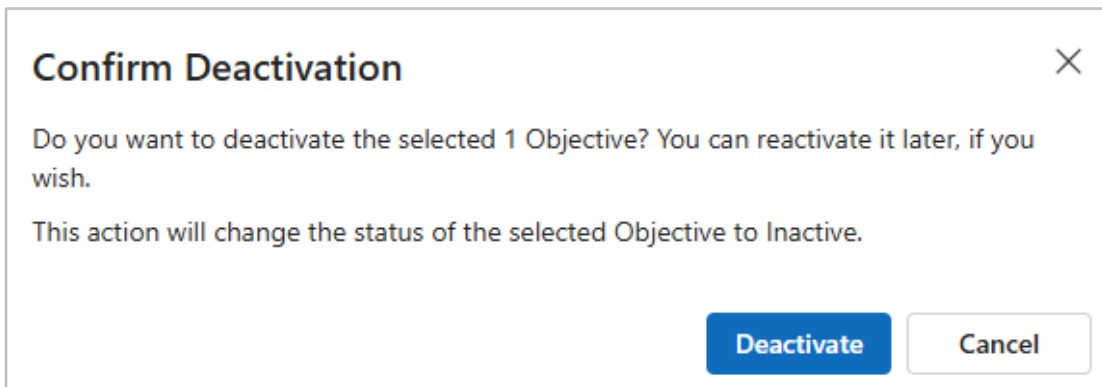
Objectives are active by default. You can deactivate Objectives:

- 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.

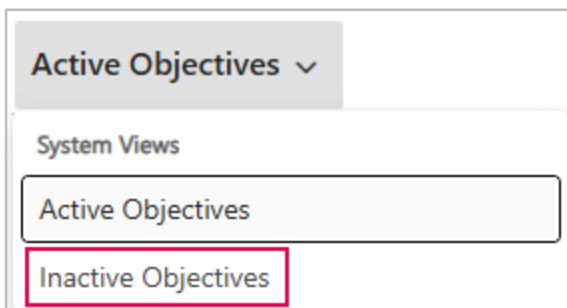
- Click *Deactivate* to deactivate the Objective.



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

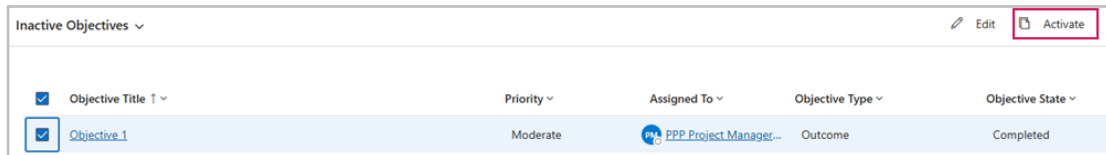
### Display only inactive Objectives:

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



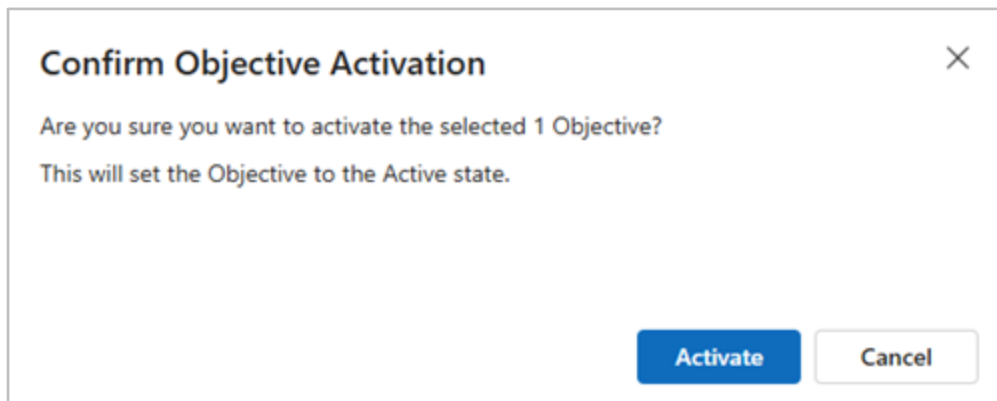
## Activate Objectives:

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



| Inactive Objectives ▾               |                   |            |                        |                  | Edit              | Activate |
|-------------------------------------|-------------------|------------|------------------------|------------------|-------------------|----------|
| <input checked="" type="checkbox"/> | Objective Title ▾ | Priority ▾ | Assigned To ▾          | Objective Type ▾ | Objective State ▾ |          |
| <input checked="" type="checkbox"/> | Objective 1       | Moderate   | PPP Project Manager... | Outcome          | Completed         |          |

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



### Confirm Objective Activation

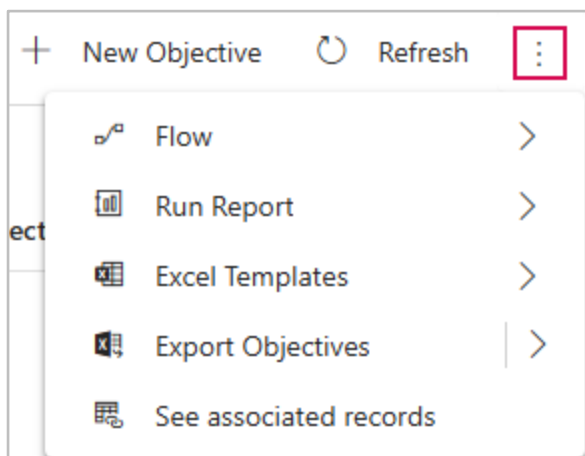
Are you sure you want to activate the selected 1 Objective?  
This will set the Objective to the Active state.

**Activate** **Cancel**

## 16.4 Additional Commands for Objectives

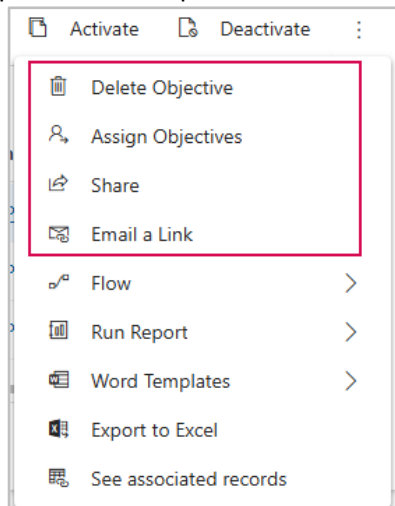
Above the *Active Objectives* table, there are additional commands that you can use:

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



---

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



---

➤ Select the desired command:

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

---

⚠ This action cannot be undone.

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

## 17 Benefits

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

This section describes how to:

- [Add Benefits](#)  223
- [Edit Benefits](#)  228
- [Deactivate and Activate Benefits](#)  229
- [Use additional Commands for Benefits](#)  230

### 17.1 Add Benefits

To add a Benefit, proceed as follows:

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

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

Quick Create: Benefit

×

General

Title

\*

---

Project

\*

Project X ×

🔍

Owner

\*

PM PPP Project Manager (Offline ×

🔍

Benefit Owner

---

🔍

Description

---

Benefit Type

---

▼

Measurement Frequency

---

Measurement Process

---

Benefit State

---

▼

Benefit Category

---

▼

Benefit Amount

---

Benefit Target

---

Benefit Target Date

---

📅

Baseline Data Date

---

📅

Benefit Amount Realized

---

Save and Close

▼

Cancel

- Fill out the form:

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

- **General:**

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

---

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

---

- **Benefit Owner:**

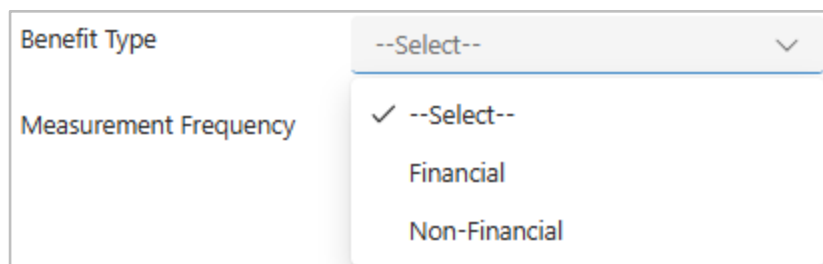
- Click on the input field, then press the Enter key and enter the responsible person.

- **Description:**

- Enter a meaningful description of the Benefit.

- **Benefit Type:**

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

A screenshot of a web form showing a dropdown menu for 'Benefit Type'. The dropdown is open, displaying three options: '--Select--' (with a checkmark), 'Financial', and 'Non-Financial'. The background shows other form fields like 'Measurement Frequency'.

- **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 State       | --Select--   |
| Benefit Category    | ✓ --Select-- |
| Benefit Amount      | Documented   |
| Benefit Target      | On Track     |
|                     | Partial      |
|                     | Realized     |
| Benefit Target Date | Not Realized |

▪ **Benefit Category:**

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

|                     |                                |
|---------------------|--------------------------------|
| Benefit Category    | --Select--                     |
| Benefit Amount      | ✓ --Select--                   |
| Benefit Target      | Efficiency Gains               |
|                     | Enables Digital Strategy       |
|                     | Enables Network Integrity      |
| Benefit Target Date | Improves Customer Satisfaction |
| Baseline Data Date  | Supports Customer Growth       |

▪ **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 Target Date

Baseline Data Date

Benefit Amount Realized

Benefit Realized Date

February 2025

| So | Mo | Di | Mi | Do | Fr | Sa |
|----|----|----|----|----|----|----|
| 26 | 27 | 28 | 29 | 30 | 31 | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 1  |

Cancel

- *Benefit Amount Realized:*

➤ Enter the amount.

➤ Click *Save and Close*.

Or

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

Save & Create New

Save and Close

▼

- ▶ 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.

Active Benefits ▾

- ☐ Title ↑ ▾
- ☐ **Benefit 1**

Or

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

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

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

← ↻ 📄 Save **Save & Close** 🗑️ Dea

**Benefit 1 - Saved**

Benefit

**General**

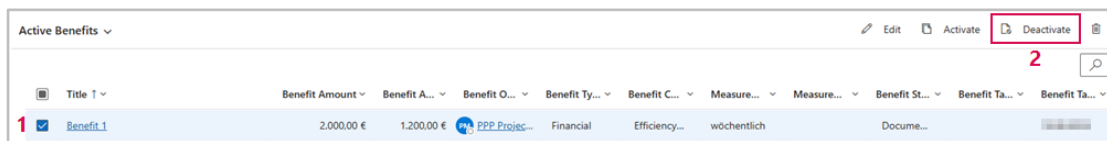
Title \* **Benefit 1**

- 
- 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:

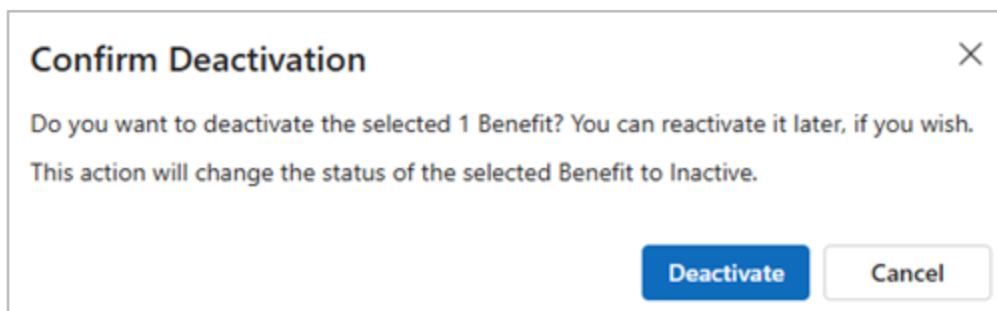
- Select the Benefit you want to deactivate.
- Click on the Benefit row to highlight it. (1)
- Click on *Deactivate*. (2)



The screenshot shows a table titled 'Active Benefits'. The first row is selected, indicated by a blue highlight and a red '1' in the left margin. The 'Deactivate' button in the top right corner is highlighted with a red box and a red '2'.

| Title     | Benefit Amount | Benefit A... | Benefit O... | Benefit Ty... | Benefit C...  | Measure...  | Measure... | Benefit St... | Benefit Ta... | Benefit Ta... |
|-----------|----------------|--------------|--------------|---------------|---------------|-------------|------------|---------------|---------------|---------------|
| Benefit_1 | 2.000,00 €     | 1.200,00 €   | PPP Proje... | Financial     | Efficiency... | wöchentlich |            | Docume...     |               |               |

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

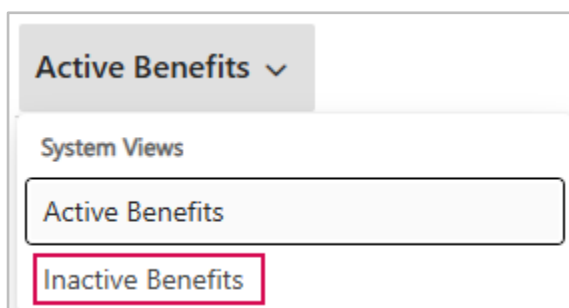


The dialog box titled 'Confirm Deactivation' contains the following text: 'Do you want to deactivate the selected 1 Benefit? You can reactivate it later, if you wish. This action will change the status of the selected Benefit to Inactive.' At the bottom right, there are two buttons: 'Deactivate' (blue)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

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

**Display only inactive Benefits:**

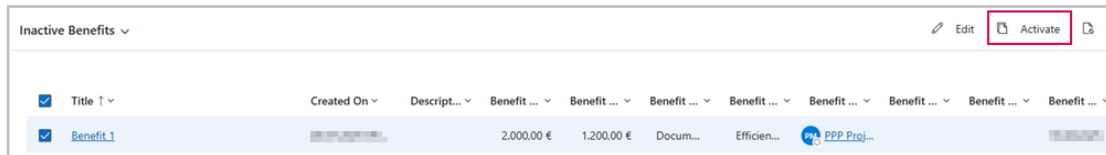
- Go to *Active Benefits*.
- Click the down arrow.
- Click on *Inactive Benefits*.



The screenshot shows a dropdown menu for 'Active Benefits'. The menu is open, showing 'System Views' at the top, followed by 'Active Benefits' and 'Inactive Benefits'. The 'Inactive Benefits' option is highlighted with a red box.

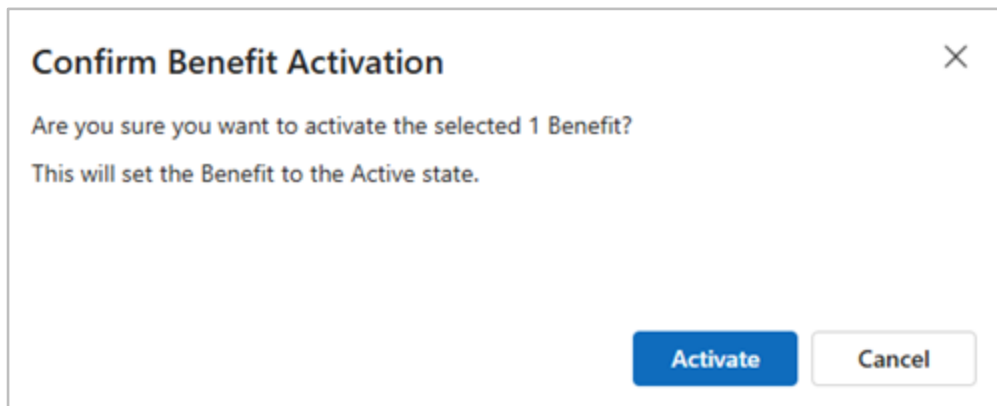
## Activate Benefits:

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



The screenshot shows a table titled 'Inactive Benefits'. The table has columns: Title, Created On, Descript..., Benefit ..., Benefit ..., Benefit ..., Benefit ..., Benefit ..., Benefit ..., Benefit ..., and Benefit ... The first row is highlighted and contains the text 'Benefit 1', a date, '2,000.00 €', '1,200.00 €', 'Docum...', 'Efficien...', and 'PPP Proj...'. The 'Activate' button in the top right corner is highlighted with a red box.

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

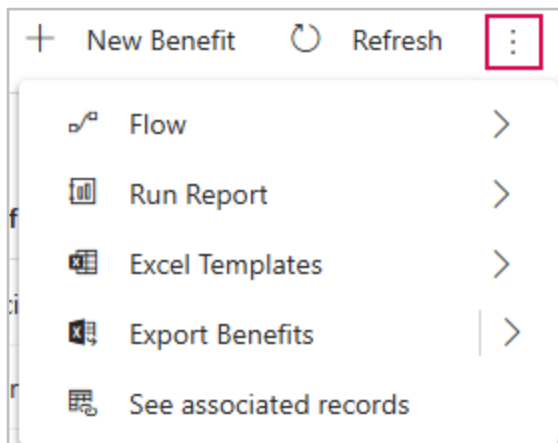


The screenshot shows a dialog box titled 'Confirm Benefit Activation'. It contains the text: 'Are you sure you want to activate the selected 1 Benefit?' and 'This will set the Benefit to the Active state.' At the bottom right, there are two buttons: 'Activate' (blue) and 'Cancel' (white).

## 17.4 Additional Commands for Benefits

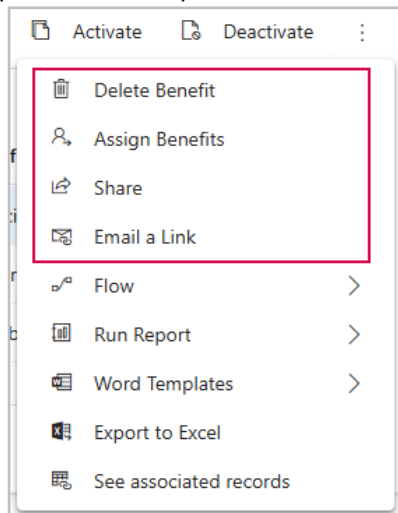
Above the *Active Benefits* table, there are additional commands that you can use:

- 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**  232
- **Edit Requirements**  237
- **Deactivate and Activate Requirements**  238
- **Use additional Commands for Requirements**  239

### 18.1 Add Requirements

To add a *Requirement*, proceed as follows:

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

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

Rows: 3

Quick Create: Requirement

×

General

Requirement

\*

---

Project

\*

Project X ×

🔍

State

---

▼

Requirement Origin

---

▼

Requirement Type

---

▼

Responsible Team

---

▼

Owner

\*

PM PPP Project Manager (Offline) ×

🔍

Stakeholders

---

🔍

Effort Estimate

---

Hourly Rate

---

MaterialCost

---

Description

---

Solution Response

---

Save and Close

▼

Cancel

- Fill out the form:

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

- **General:**

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

---

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

---

- **State:**

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

The screenshot shows a form with several fields: State, Requirement Origin, Requirement Type, Responsible Team, Owner, and Stakeholders. The 'State' field is selected, and its dropdown menu is open. The dropdown menu contains the following options: --Select--, Draft, Ready for Review, Approved, Rejected, Deferred, Waiting for Assignment, and Waiting for Estimate. The 'Owner' field has a red asterisk next to it.

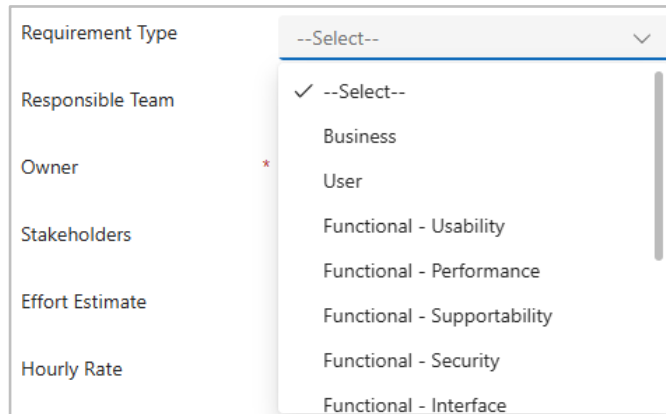
- **Requirement Origin:**

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

The screenshot shows the same form as before, but the 'Requirement Origin' field is selected, and its dropdown menu is open. The dropdown menu contains the following options: --Select--, RFP, RFI, SOW, Change Request, and Stakeholder Request. The 'Owner' field has a red asterisk next to it.

▪ **Requirement Type:**

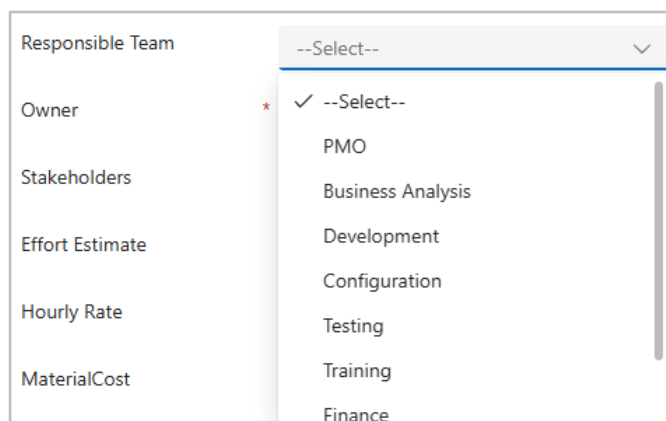
- Click in the field and select the requirement type from the drop-down menu.



A screenshot of a form with a dropdown menu open for the 'Requirement Type' field. The dropdown list includes the following options: --Select--, Business, User, Functional - Usability, Functional - Performance, Functional - Supportability, Functional - Security, and Functional - Interface. The 'Requirement Type' field is marked with a red asterisk.

▪ **Responsible Team:**

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



A screenshot of a form with a dropdown menu open for the 'Responsible Team' field. The dropdown list includes the following options: --Select--, PMO, Business Analysis, Development, Configuration, Testing, Training, and Finance. The 'Responsible Team' field is marked with a red asterisk.

- **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.

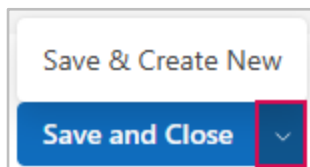
- *Description, Solution Response:*

- 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.

Active Requirements ▾

- ☐ Requirement ↑ ▾
- ☐ Requirement 1

Or

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

| Active Requirements ▾ |                                                   |              |               |                    |
|-----------------------|---------------------------------------------------|--------------|---------------|--------------------|
|                       | Requirement ↑ ▾                                   | Created On ▾ | Description ▾ | Requirement Type ▾ |
| 1                     | <input checked="" type="checkbox"/> Requirement 1 |              |               | Business           |

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

← ↻ ↺ Save Save & Close

**Requirement 1 - Saved**  
Requirement

**General**

Requirement \* Requirement 1

- 
- 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)

| Active Requirements ▾ |                                                   |              |               |                    | ✎ Edit  | 📄 Activate | 🗑 Deactivate |
|-----------------------|---------------------------------------------------|--------------|---------------|--------------------|---------|------------|--------------|
|                       | Requirement ▴ ▾                                   | Created On ▾ | Description ▾ | Requirement Type ▾ | State ▾ |            |              |
| 1                     | <input checked="" type="checkbox"/> Requirement 1 |              |               | Business           | Draft   |            |              |

- ▶ The *Confirm Deactivation* field opens.

- Click *Deactivate* to deactivate the Requirement.

### Confirm Deactivation

Do you want to deactivate the selected 1 Requirement? You can reactivate it later, if you wish.

This action will change the status of the selected Requirement to Inactive.

Deactivate
Cancel

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*.

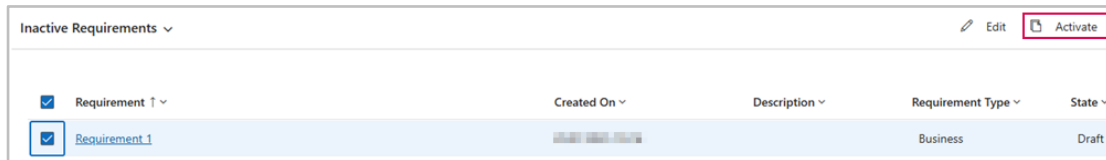
Active Requirements ▾

System Views

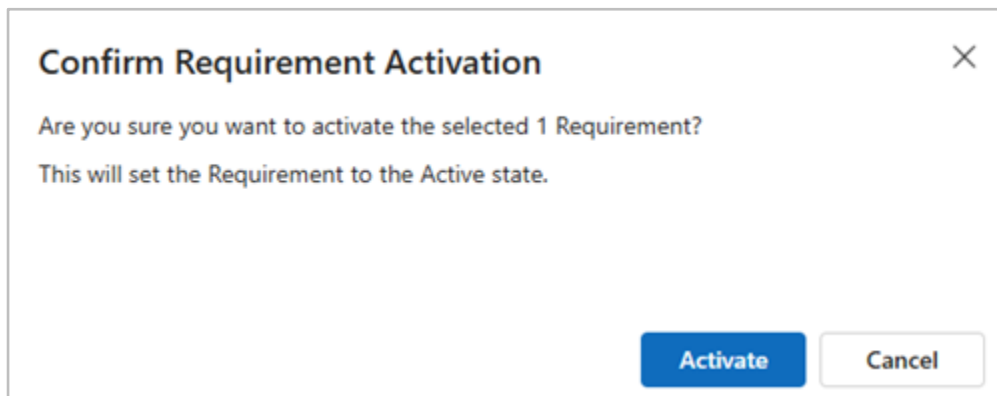
Active Requirements
Inactive Requirements

### Activate Requirements:

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



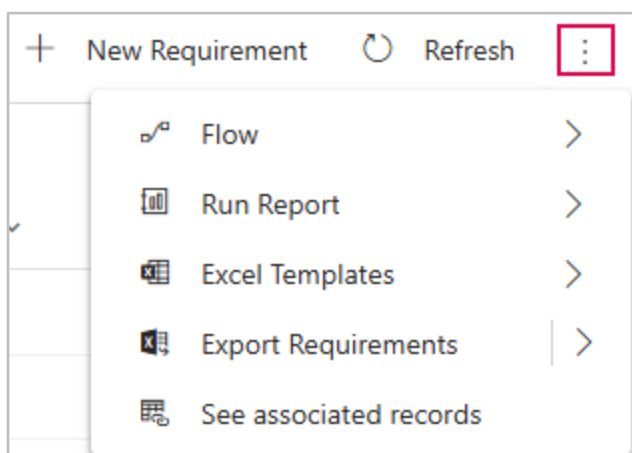
- ▶ The *Confirm Requirement Activation* field opens.
- Click on *Activate* to activate the Requirement.



## 18.4 Additional Commands for Requirements

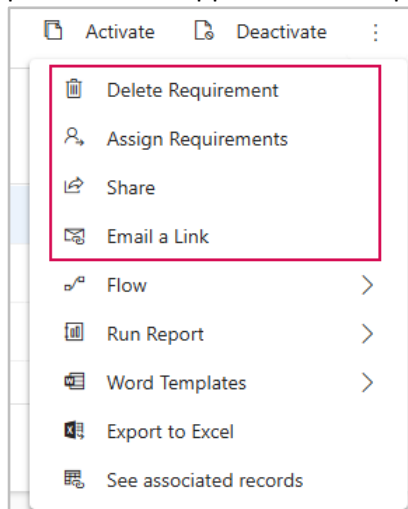
Above the *Active Requirements* table, there are additional commands that you can use:

- 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](#)  241
- [Edit Lessons Learned](#)  244
- [Deactivate and Activate Lessons Learned](#)  245
- [Use additional Commands for Lessons Learned](#)  247

### 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.

| Active Lessons Learned ▾            |                                                                                     |                  |               |               |          |          | <a href="#">+ New Lesson Learned</a> |
|-------------------------------------|-------------------------------------------------------------------------------------|------------------|---------------|---------------|----------|----------|--------------------------------------|
| <input type="checkbox"/> Lesson ↑ ▾ | Created On ▾                                                                        | Knowledge Area ▾ | Lesson Type ▾ | Description ▾ | Impact ▾ | Recommen |                                      |
| <input type="checkbox"/> Lesson 1   |  | Communicatio...  | Success       |               |          |          |                                      |
| <input type="checkbox"/> Lesson 2   |  | Risk Managem...  | Problem       |               |          |          |                                      |

Quick Create: Lesson Learned

×

General

Lesson

\*

---

Project

\*

Project X ×

🔍

Owner

\*

PM PPP Project Manager (Offline) ×

🔍

Knowledge Area

---

▼

Lesson Type

---

▼

Description

---

Impact

---

Recommendations

---

Rating

★

★

★

★

★

Save and Close

▼

Cancel

- 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.

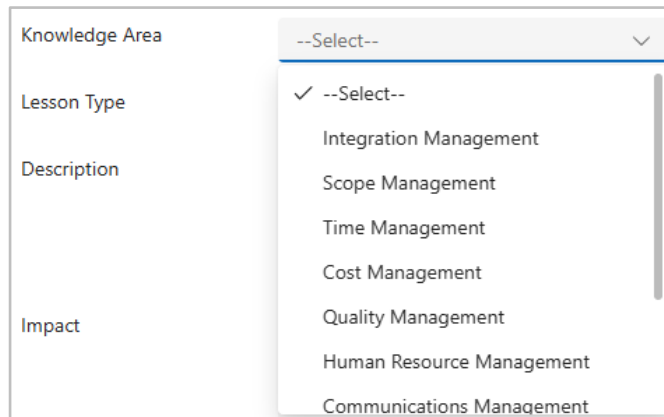
▪ **General:**

- **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:**

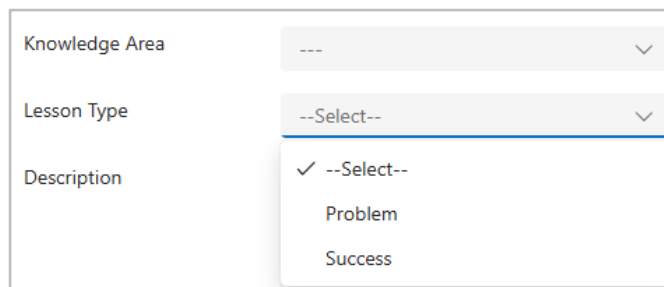
► Click in the field and select the knowledge area from the drop-down menu.



The screenshot shows a form with four fields: Knowledge Area, Lesson Type, Description, and Impact. The Knowledge Area field is active, and its dropdown menu is open. The menu lists the following options: --Select--, Integration Management, Scope Management, Time Management, Cost Management, Quality Management, Human Resource Management, and Communications Management. The --Select-- option is currently selected.

▪ **Lesson Type:**

► Click in the field and select the type of Lesson Learned from the drop-down menu.



The screenshot shows the same form as before, but now the Lesson Type field is active, and its dropdown menu is open. The menu lists the following options: --Select--, Problem, and Success. The --Select-- option is currently selected.

▪ **Description, Impact, Recommendations::**

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

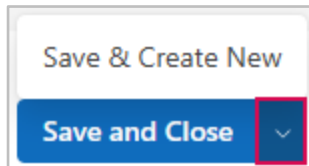
▪ **Rating:**

➤ 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.



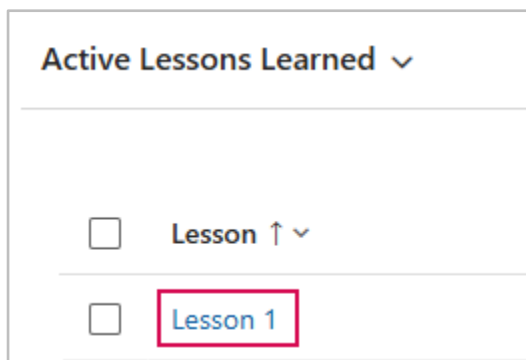
▶ A Lesson Learned is added.

▶ 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)

| Active Lessons Learned ▾                       |              |                  |               |               |          |  | 2  Edit  Activate |
|------------------------------------------------|--------------|------------------|---------------|---------------|----------|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Lesson ↑ ▾            | Created On ▾ | Knowledge Area ▾ | Lesson Type ▾ | Description ▾ | Impact ▾ |  |                                                                                                                                                                                         |
| 1 <input checked="" type="checkbox"/> Lesson 1 |              | Communicatio...  | Success       |               |          |  |                                                                                                                                                                                         |

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




 Save
  **Save & Close**
 Deacti

### Lesson 1 - Saved

#### Lesson Learned

#### General

Lesson \* Lesson 1

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

## 19.3 Deactivate and Activate Lessons Learned

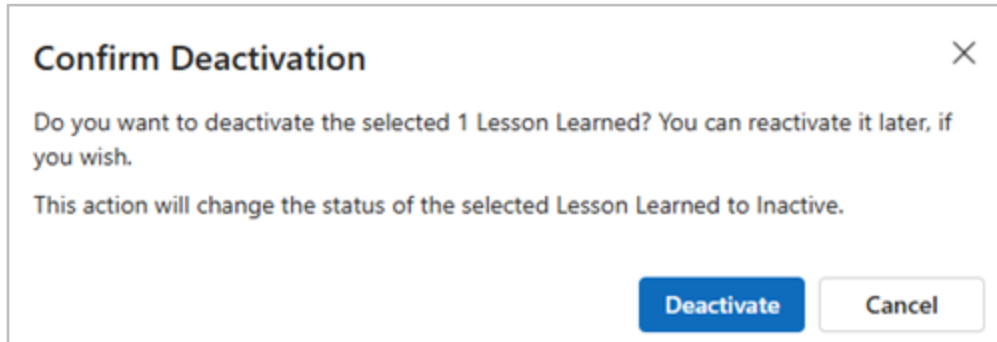
Lessons Learned are active by default. You can deactivate Lessons Learned:

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

| Active Lessons Learned ▾                       |              |                  |               |               |          |                 |  Edit  Activate <b>2</b>  Deactivate |
|------------------------------------------------|--------------|------------------|---------------|---------------|----------|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Lesson ↑ ▾            | Created On ▾ | Knowledge Area ▾ | Lesson Type ▾ | Description ▾ | Impact ▾ | Recommendations |                                                                                                                                                                                                                                                                                                     |
| 1 <input checked="" type="checkbox"/> Lesson 1 |              | Communicatio...  | Success       |               |          |                 |                                                                                                                                                                                                                                                                                                     |

► 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.

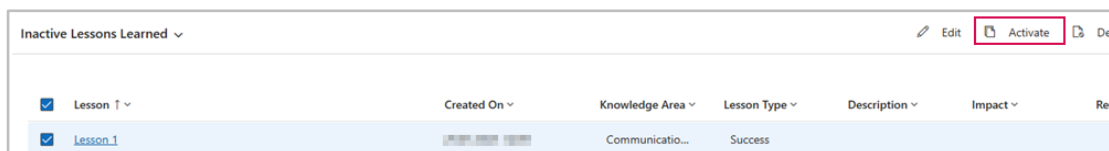
➤ Click on *Inactive Lessons Learned*.



#### Activate Lessons Learned:

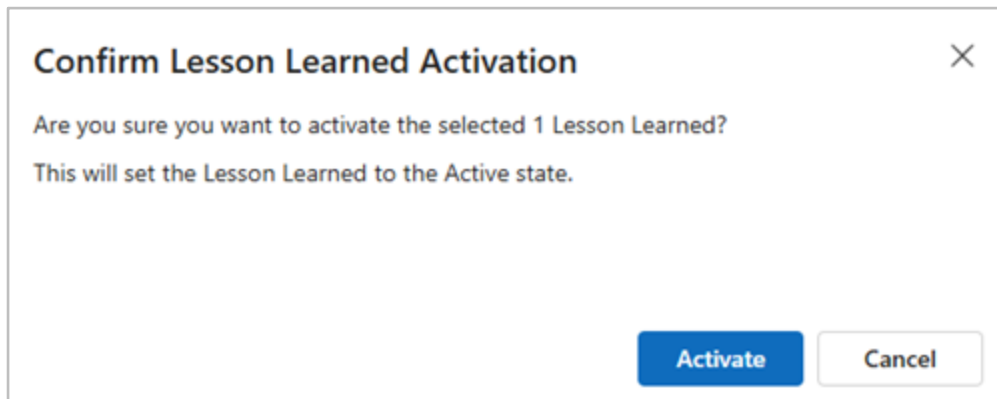
➤ Select the Lesson Learned as described above.

➤ Click on *Activate*.



► The *Confirm Lesson Learned Activation* field opens.

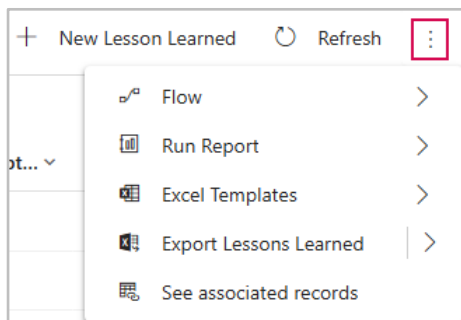
- Click on *Activate* to activate the Lesson Learned.



## 19.4 Additional Commands for Lessons Learned

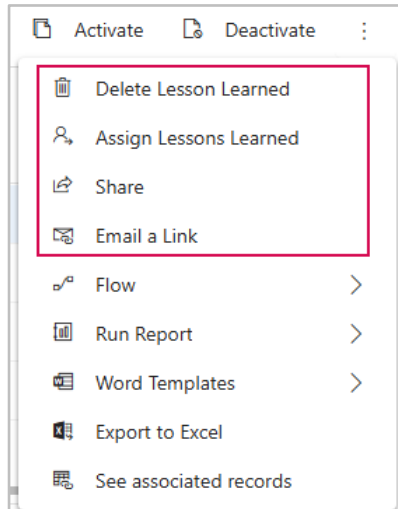
Above the *Active Lessons Learned* table, there are additional commands that you can use:

- 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:

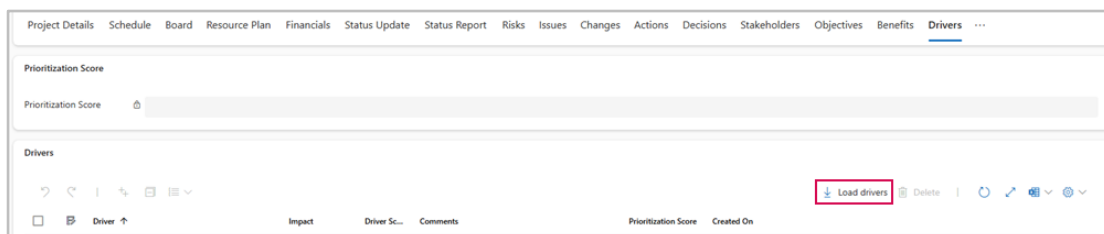
- [Load and rate drivers in the project](#)  249
- [Create and view drivers](#)  253
- [Access the Priority Dashboard](#)  256

### 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.

|                          | Driver ↑                                   | Impact | Driver Sc... | Comments | Prioritization Score | Created On        |
|--------------------------|--------------------------------------------|--------|--------------|----------|----------------------|-------------------|
| <input type="checkbox"/> | TPG Alignment with Organizational Strategy |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/> | TPG Cost reduction                         |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/> | TPG Cost Saving                            |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/> | TPG Expand into new markets                |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/> | TPG Improve Employee Productivity          |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/> | TPG Increased Market Share                 |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/> | TPG Supports product strategy              |        |              |          |                      | 02.01.2025 15:... |

### 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.

|                                     | Driver ↑                                   | Impact | Driver Sc... | Comments | Prioritization Score | Created On        |
|-------------------------------------|--------------------------------------------|--------|--------------|----------|----------------------|-------------------|
| <input checked="" type="checkbox"/> | TPG Alignment with Organizational Strategy |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/>            | TPG Cost reduction                         |        |              |          |                      | 02.01.2025 15:... |
| <input type="checkbox"/>            | TPG Cost Saving                            |        |              |          |                      | 02.01.2025 15:... |

### 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.

| Driver                                     | Impact  | Driver Sc... | Comments |
|--------------------------------------------|---------|--------------|----------|
| TPG Alignment with Organizational Strategy | Extreme |              |          |
| TPG Cost reduction                         |         |              |          |
| TPG Cost Saving                            |         |              |          |
| TPG Expand into new markets                |         |              |          |
| TPG Improve Employee Productivity          |         |              |          |
| TPG Increased Market Share                 |         |              |          |
| TPG Supports product strategy              |         |              |          |

► 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.

| Drivers |                                            |          |              |          |                      |
|---------|--------------------------------------------|----------|--------------|----------|----------------------|
|         | Driver                                     | Impact   | Driver Score | Comments | Prioritization Score |
|         | TPG Alignment with Organizational Strategy | Low      | 25,00        |          | 75,00                |
|         | TPG Cost reduction                         | High     | 75,00        |          | 225,00               |
|         | TPG Cost Saving                            | Moderate | 50,00        |          | 200,00               |
|         | TPG Expand into new markets                | Extreme  | 100,00       |          | 400,00               |
|         | TPG Improve Employee Productivity          | None     | 0,00         |          | 0,00                 |

### 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

TPG Cost reduction - Saved
Driver

General
Related

Project impact statements

|          |              |
|----------|--------------|
| None     | No impact    |
| Low      | up to 3%     |
| Moderate | up to 6%     |
| Strong   | up to 10%    |
| Extreme  | 10% and more |

Driver Weighting

Weighting

★ ★ ★ ☆ ☆

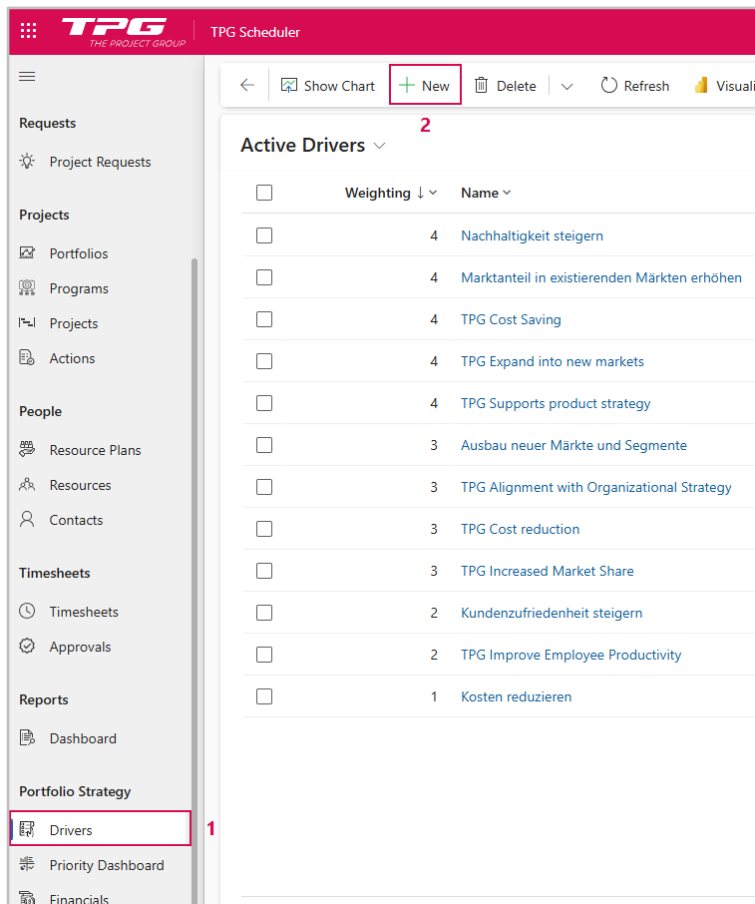
## 20.2 Create and view drivers

In the *Portfolio Strategy* section of the **Navigation bar** <sup>20</sup>, 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** <sup>14</sup>. (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.

The screenshot shows the 'New Driver' form in the TPG Scheduler application. The form is titled 'New Driver' and has a 'General' tab. It includes fields for Name, Owner (set to Petra Portfoliona / Offline), and Description. A 'Project Request?' toggle is set to 'Yes'. Below these are 'Project Impact Statements' for None, Low, Moderate, Strong, and Extreme. At the bottom is a 'Driver Weighting' section with a star rating.

4

New Driver

General

Name \*

Owner \* PP Petra Portfoliona / Offline x

Description

Project Request? Yes 3

Project Impact Statements

None

Low

Moderate

Strong

Extreme

Driver Weighting

Weighting \* ☆ ☆ ☆ ☆ ☆

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.

Read-only: You don't have access to edit this record.

←

☰

↗

↺ Refresh

🔍 Check Access

🔗 Flow

⌵

📄

W

TPG Cost Saving - Saved

Driver

General

Related

⌵

Name

\*

TPG Cost Saving

Owner

\*

Description

Project Request?

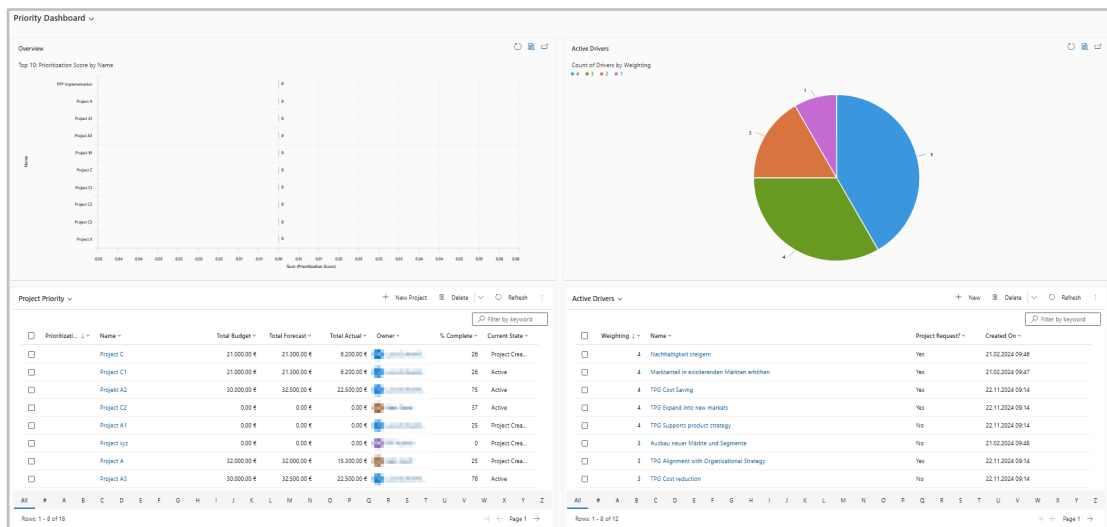
Yes

## 20.3 Priority Dashboard

In the *Portfolio Strategy* section of the **Navigation bar**<sup>20</sup>, 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

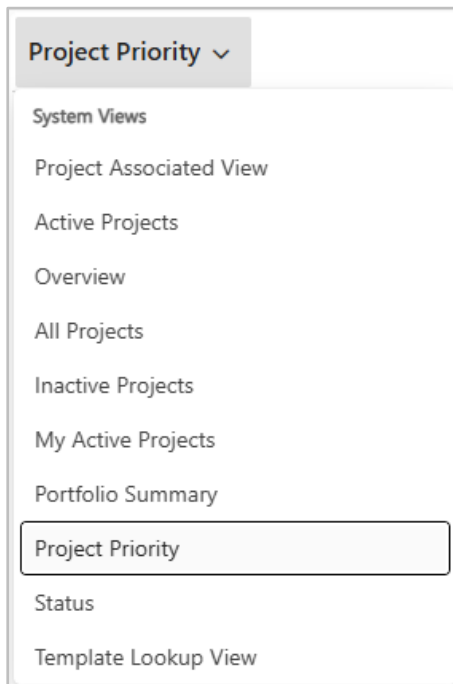


The Priority Dashboard contains two charts and two tables that present key information visually and in tabular form:

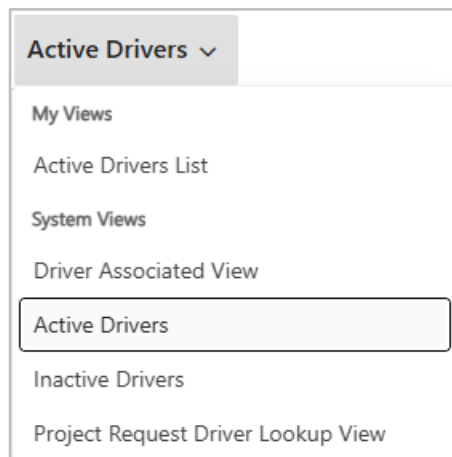
- **Overview (bar chart):** *Top 10: Prioritization Score by Name*
  - Shows the ten projects with the highest Prioritization Score.
- **Active Drivers (pie chart):** *Count of Drivers by Weighting*
  - Shows the distribution of active drivers by weighting.
- **Project list (table):** *Project Priority* (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

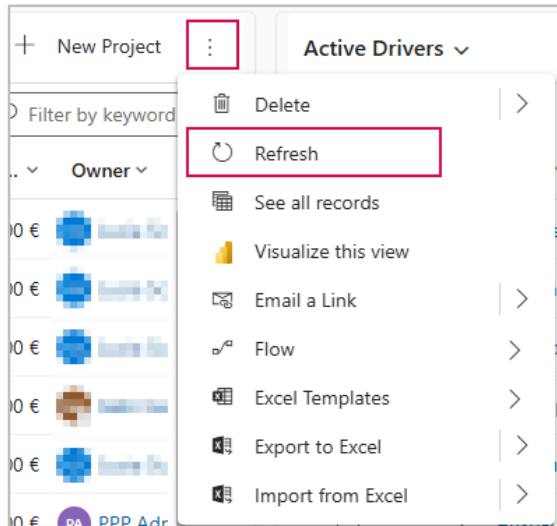
Projects in the navigation bar.)



- **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  260
- Assign Timesheets permissions  264
- Add tasks to Timesheets  266
- Record working time  273
- Approve entries  278
- View approved entries in the project  279

## 21.1 User interface for Timesheets

The *My Timesheets* view can be accessed via the *Timesheets* section in the **Navigation bar** <sup>20</sup>:

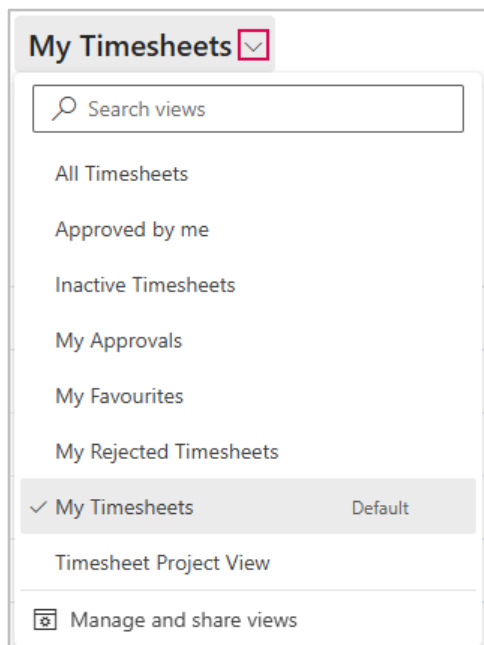
➤ Go to the *Timesheets* section in the Navigation bar.

➤ Click on *Timesheets*.

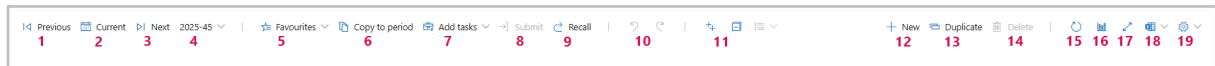
► The *My Timesheets* view opens by default.

| Project              | Assignment         | Mon (03.11) | Tue (04.11) | Wed (05.11) | Thu (06.11) | Fri (07.11) | Sat ... | Sun ... | Total | Comment                | Onsite | Approver   | Approver's comment |
|----------------------|--------------------|-------------|-------------|-------------|-------------|-------------|---------|---------|-------|------------------------|--------|------------|--------------------|
| Project A(I)         |                    |             |             |             |             |             |         |         | 0,00  |                        |        |            |                    |
| Project X(3)         |                    | 3,00        | 3,00        | 6,00        | 6,00        | 4,00        |         |         | 22,00 |                        |        |            |                    |
| Project X            | Planning Completed |             |             |             | 5,00        | 2,00        |         |         | 7,00  |                        | No     |            |                    |
| Project X            | Financing          | 3,00        | 1,00        | 6,00        |             | 2,00        |         |         | 12,00 |                        | No     |            |                    |
| Project X            | Detailed Planning  | 0,00        | 2,00        |             | 1,00        |             |         |         | 3,00  |                        | No     |            |                    |
| Project XY (3)       |                    | 1,00        |             |             | 1,00        | 2,00        |         |         | 4,00  |                        |        |            |                    |
| Project XY           | Subtask 3          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
| Project XY           | Milestone 1        |             |             |             | 1,00        |             |         |         | 1,00  | Comment to Milestone 1 | No     |            |                    |
| Project XY           | Subtask 3          | 1,00        |             |             |             | 2,00        |         |         | 3,00  |                        | Yes    | Gabi Gantl | Approved           |
| Zeitrückmeldung (TZ) |                    | 4,00        | 5,00        | 2,00        | 1,00        | 2,00        |         |         | 14,00 |                        |        |            |                    |
| Zeitrückmeldung      | Aufgabe 2          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
| Zeitrückmeldung      | Vorgang 1          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
| Zeitrückmeldung      | Vorgang 2          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
| Zeitrückmeldung      | Aufgabe 3          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
| Zeitrückmeldung      | Aufgabe 5          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
| Zeitrückmeldung      | Aufgabe 4          |             |             |             |             |             |         |         | 0,00  |                        | No     |            |                    |
|                      |                    | 8,00        | 8,00        | 8,00        | 8,00        | 8,00        |         |         | 40,00 |                        |        |            |                    |

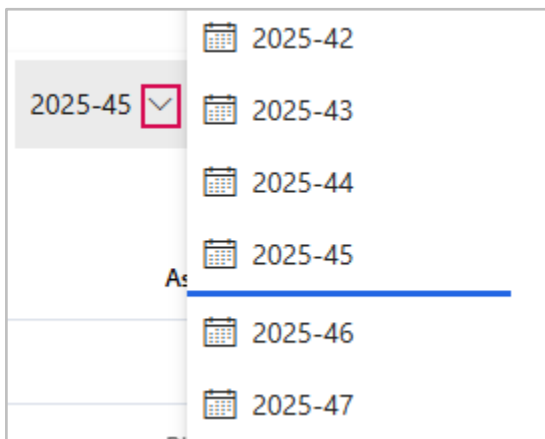
You can switch to other views using the drop-down menu:



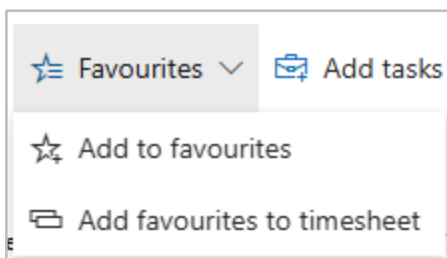
Below the drop-down menu, you will find a command bar. The following commands are available for time reporting:



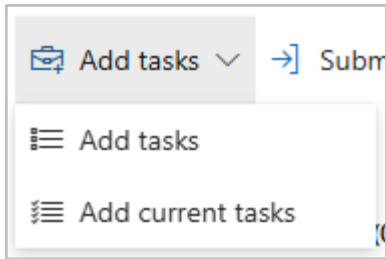
- Jump back to the previous week (1)
- Jump to the current week (2)
- Jump to the next week (3)
- Open list of all available time periods (4)



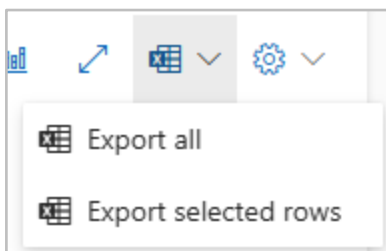
- Open the *Favourites* drop-down menu (5)



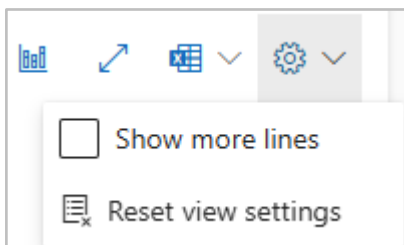
- *Copy to period* (6): Copy one or more tasks to other time periods.
- Open the drop-down menu for adding tasks to Timesheets (7)



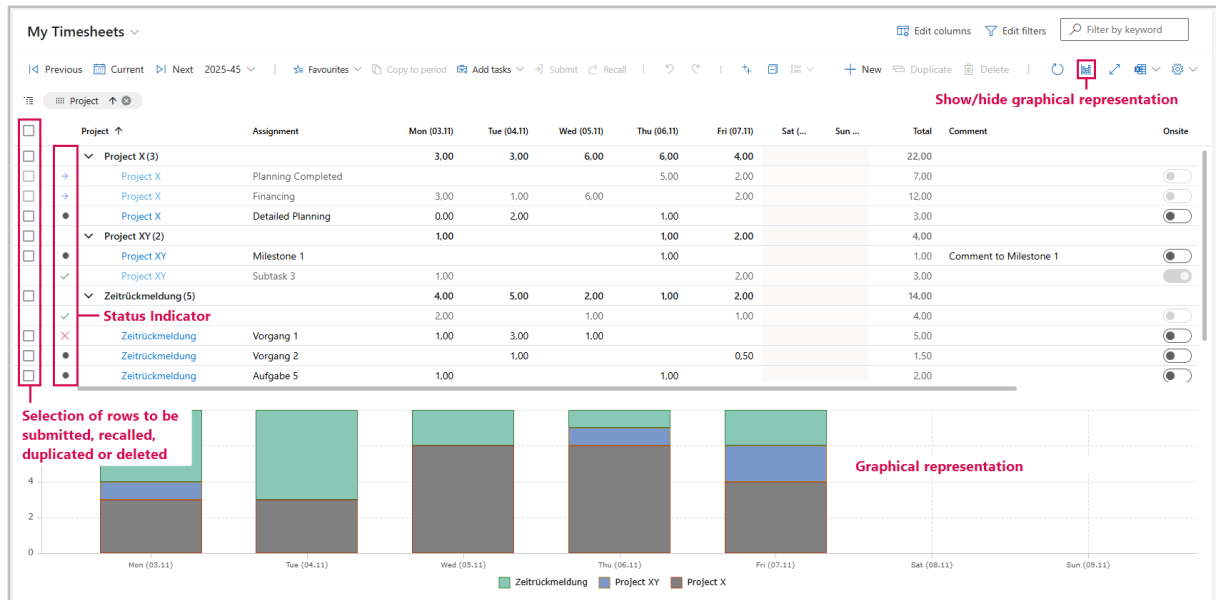
- Send selected rows for approval (8)
- Recall selected rows after sending (9)
- Undo last action and repeat last undone action (10)
- Collapse and expand rows in the table and expand up to a specific point (11)
- Add a new row to the table (12)
- Duplicate selected rows (13)
- Delete selected rows (14)
- Reload page (15)
- Shows or hides a graphical representation of the time spent per project (16)
- Expands and opens the page content in a separate window (17)
- Export all or selected rows to Excel (18)



- Open drop-down menu to display more rows per page or reset display settings (19)



## Overview Timesheets:



## Explanation of status indicator:

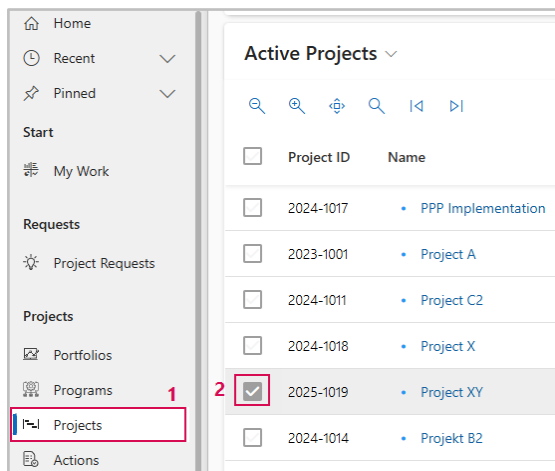
- Dot = Draft
- Blue arrow = Submitted
- Green check mark = Approved
- Red cross = Rejected

## 21.2 Assign permissions

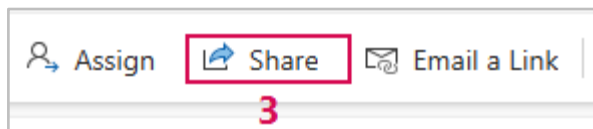
Members of the project team without comprehensive permissions in PPP can only record their working hours if the project has been approved for them.

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

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

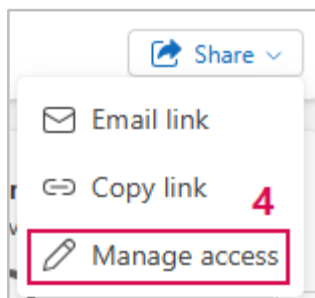


- Click *Share* in the **Command bar**  (3).



Or

- Click *Share* in the **Command bar**  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.

## Share records

Manage who can see your record and how much access they get.  
Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team

---

Search

Previously shared access

PP

PPP Project Manager

GG

Gabi Gantt

PP

PPP Project User

PPP Project User

Grant this user or team access to this record by assigning them permissions

Permissions

☒ Read

☐ Write

☐ Delete

☐ Append

☒ Append to

☐ Assign

☐ Share

Share with 1 users

8

Share

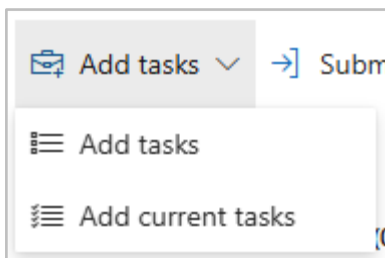
## 21.3 Add tasks to Timesheets

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.

### Add tasks

◀ Previous
Current
Next ▶
...

| <input type="checkbox"/>            | Task                     | Effort | Start      | Finish     |
|-------------------------------------|--------------------------|--------|------------|------------|
| <input type="checkbox"/>            | ➤ PPP Implementation (5) |        |            |            |
| <input type="checkbox"/>            | ▼ Project X (3)          |        |            |            |
| <input type="checkbox"/>            | Planning Completed       |        | 28.11.2025 | 28.11.2025 |
| <input checked="" type="checkbox"/> | Financing                | 40 hrs | 24.11.2025 | 28.11.2025 |
| <input type="checkbox"/>            | Detailed Planning        | 80 hrs | 10.11.2025 | 21.11.2025 |
| <input checked="" type="checkbox"/> | ▼ Project XY (8)         |        |            |            |
| <input checked="" type="checkbox"/> | Task 11                  | 35 hrs | 06.02.2025 | 14.02.2025 |
| <input checked="" type="checkbox"/> | Subtask 4                | 40 hrs | 03.11.2025 | 07.11.2025 |
| <input checked="" type="checkbox"/> | Task 10                  | 8 hrs  | 06.02.2025 | 06.02.2025 |
| <input checked="" type="checkbox"/> | Milestone 1              |        | 28.11.2025 | 28.11.2025 |
| <input checked="" type="checkbox"/> | Task 9                   | 15 hrs | 06.02.2025 | 07.02.2025 |

☐ Show completed tasks
 ☒ Show department tasks
 Confirm
Cancel

- (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

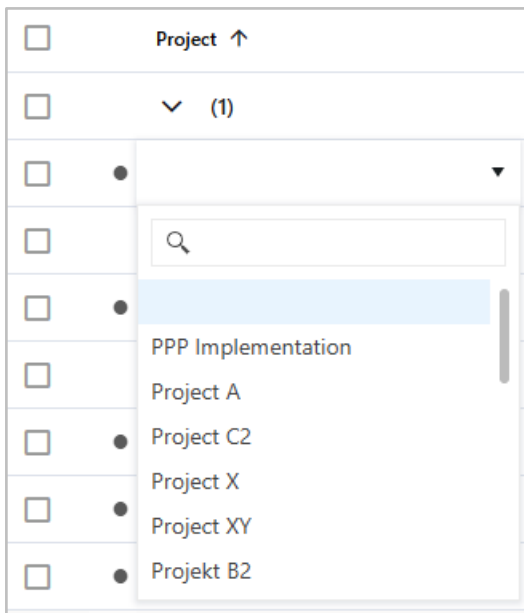
- Click on *Add current tasks* to insert all tasks that take place in the selected period.
- Click on *Confirm*.
- The selected tasks are added to the Timesheets table.

#### 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.

The screenshot shows the 'My Timesheets' interface. At the top, there are navigation buttons: 'Previous', 'Current', 'Next', and a date selector '2025-46'. A red box highlights the '+ New' button, and a red '1' is placed above the table header. The table has columns for 'Project', 'Assignment', and days of the week (Mon (10.11), Tue (11.11), Wed (12.11), Thu (13.11), Fri (14.11), Sat (...), Sun ...), 'Total', 'Comment', and 'Onsite'. The table contains several rows, including a summary row for 'Project X (4)' and individual task rows for 'Project X' with assignments like 'Planning Completed', 'Financing', and 'Detailed Planning'.

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



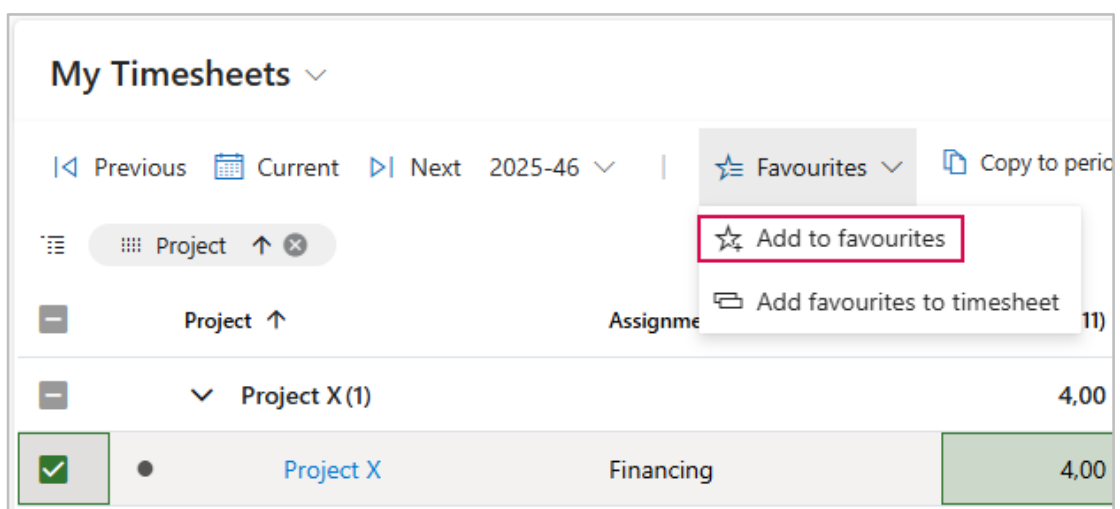
- Select the desired project.

#### Use favourites:

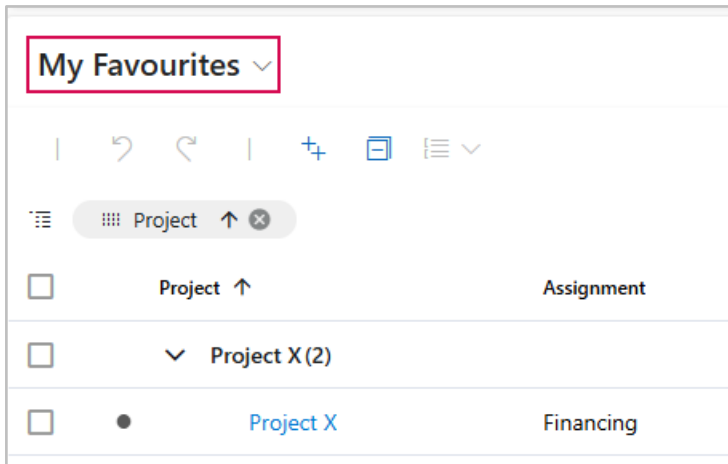
Favourites allow you to transfer existing tasks to other weeks. The transfer can be done with or without recorded working hours.

#### Marking favourites:

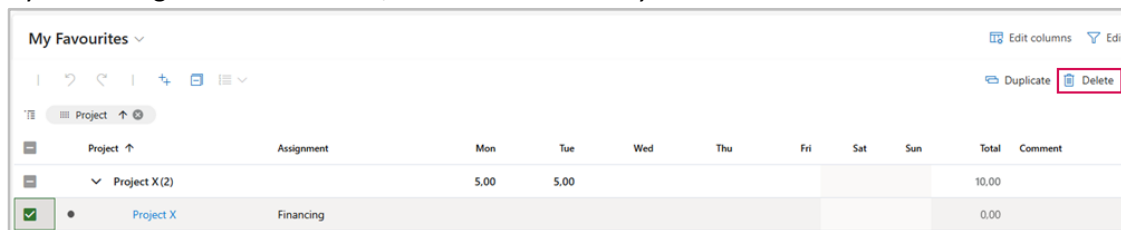
- Check the box for the task you want to mark as a favourite.
- Click on *Favourites*. ► The drop-down menu opens.
- Select *Add to favourites*.



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

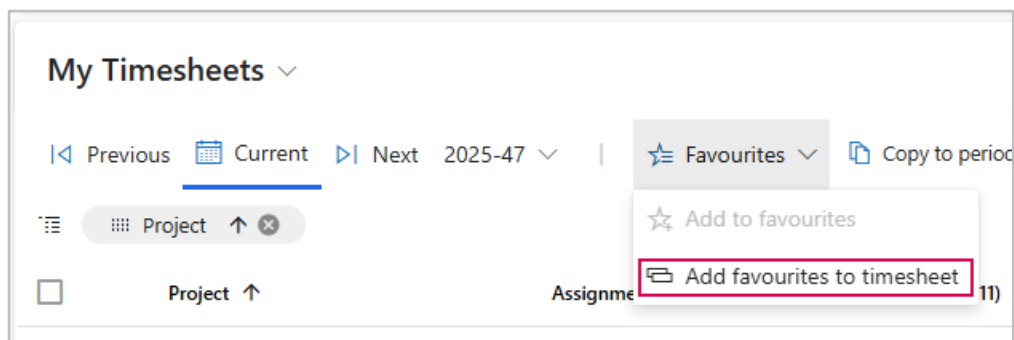


- If you no longer need a favorite, delete it from the *My Favourites* view.



## 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)

### Add favourites

| <input checked="" type="checkbox"/> Task              | Mon | Tue | Wed | Thu | Fri | Sat | Sun | Total | Comment |
|-------------------------------------------------------|-----|-----|-----|-----|-----|-----|-----|-------|---------|
| <input checked="" type="checkbox"/> Project X(2)      |     |     |     |     |     |     |     |       |         |
| <input checked="" type="checkbox"/> Financing         |     |     |     |     |     |     |     | 0     |         |
| <input checked="" type="checkbox"/> Detailed Planning | 5   | 5   |     |     |     |     |     | 10    |         |

3

☒ Include values 4
 5
Confirm
Cancel

► The tasks are added to the desired week.

### Copying Tasks to Other Time Periods

The *Copy to period* function allows you to transfer one or more existing tasks from your time sheet to other time periods. This copies the tasks along with their associated information, but does not transfer the hours that have already been recorded. This allows you to quickly set up regularly recurring tasks for future time periods and reduces the effort required for manual re-entry.

➤ Select the task or tasks you want to copy to a different time period by checking the corresponding checkbox.

- Click *Copy to period*. ➤ A form opens.

### Copy to period

From

To

☐ Select all

☐ 2025-43 (20.10.2025 – 26.10.2025)
 ☐ 2025-44 (27.10.2025 – 02.11.2025)
 ☒ **2025-45 (03.11.2025 – 09.11.2025)**
☐ 2025-46 (10.11.2025 – 16.11.2025)
 ☐ 2025-47 (17.11.2025 – 23.11.2025)
 ☐ 2025-48 (24.11.2025 – 30.11.2025)
 ☐ 2025-49 (01.12.2025 – 07.12.2025)
 ☐ 2025-50 (08.12.2025 – 14.12.2025)

No periods selected

☒ Include values
 

Confirm

Cancel

- Use the input fields to enter the exact time period (1) or a time range (2).
- Select the desired time periods by checking the corresponding checkboxes. (3)
- Check the *Include values* checkbox to transfer the activity's working hours. (4)

➤ Click *Confirm*. (5)

### Copy to period

1

2

From

To

3

☒ Select all

☐ 2025-43 (20.10.2025 – 26.10.2025)

☐ 2025-44 (27.10.2025 – 02.11.2025)

☒ **2025-45** (03.11.2025 – 09.11.2025)

☐ 2025-46 (10.11.2025 – 16.11.2025)

☒ 2025-47 (17.11.2025 – 23.11.2025)

☒ 2025-48 (24.11.2025 – 30.11.2025)

☒ 2025-49 (01.12.2025 – 07.12.2025)

☐ 2025-50 (08.12.2025 – 14.12.2025)

(2025-45, 2025-47, 2025-48, 2025-49)

4
☒ Include values

5

► The tasks are added to the selected time periods.

## 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](#)  266).

- 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)
- 

- Hover your mouse pointer over a cell to view the budget information for that allocation.
- 

- ▶ The Timesheet Budget displays the planned budget, the hours already logged, the remaining hours, and the current utilization rate.

- ▶ These values always refer to all hours already logged for this assignment.
- 

The following table shows how the system behaves depending on the budget status and overbooking settings:

| Scenario                                                                 | Behavior                                                                  |
|--------------------------------------------------------------------------|---------------------------------------------------------------------------|
| The logged hours are below the warning threshold.                        | The entry is allowed. The tooltip shows the current budget status.        |
| The logged hours reach the warning threshold.                            | After submitting, the timesheet cell shows a yellow warning.              |
| The logged hours exceed the budget and overbooking is allowed.           | Editing is allowed. The timesheet cell shows an orange or yellow warning. |
| The logged hours exceed the budget and overbooking is not allowed.       | The timesheet cell shows a red error. Submission is blocked.              |
| The logged hours exceed 100% utilization and overbooking is not allowed. | After submitting, the timesheet cell is marked in red.                    |



This also applies to values that were inserted using copy and paste.

| 123.12                                                                 | 123.12 |
|------------------------------------------------------------------------|--------|
| 123.1                                                                  | !      |
| ! Value must be in the range 0-24. ! Value should be divisible by 0.25 |        |

! Value must be in the range 0-24.  
! Value should be divisible by 0.25

### 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.

| My Timesheets ▾                                                                             |                |                    |             |             |             |
|---------------------------------------------------------------------------------------------|----------------|--------------------|-------------|-------------|-------------|
| <div> Previous Current Next 2025-45 ▾ Favourites ▾ Copy to period Add tasks ▾ Submit </div> |                |                    |             |             |             |
| <div> Project </div>                                                                        |                |                    |             |             |             |
|                                                                                             | Project ↑      | Assignment         | Mon (03.11) | Tue (04.11) | Wed (05.11) |
| <input type="checkbox"/>                                                                    | > Project A(1) |                    |             |             |             |
| <input type="checkbox"/>                                                                    | ▼ Project X(3) |                    | 3,00        | 3,00        | 6,00        |
| <input type="checkbox"/>                                                                    | → Project X    | Planning Completed |             |             |             |
| <input type="checkbox"/>                                                                    | → Project X    | Financing          | 3,00        | 1,00        | 6,00        |
| <input checked="" type="checkbox"/>                                                         | • Project X    | Detailed Planning  | 0,00        | 2,00        |             |

- Click *Yes* to confirm the confirmation dialog.

### Confirm submission

Are you sure you want to submit the selected row?

Yes
No

- ▶ The transaction(s) have been submitted for approval.
- ▶ An arrow will appear in the indicator column.

|                          |                 |   |                    |
|--------------------------|-----------------|---|--------------------|
|                          | Project         | ↑ | ×                  |
| <input type="checkbox"/> | Project         | ↑ | Assignment         |
| <input type="checkbox"/> | ▼ Project X (3) |   |                    |
| <input type="checkbox"/> | → Project X     |   | Planning Completed |

### 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.

My Timesheets

Previous

Current

Next

2025-45

Favourites

Copy to period

Add tasks

Submit

Recall

Project

Project

Assignment

Mon (03.11)

Tue (04.11)

Wed (05.11)

Thu (06.11)

> Project A (1)

▼ Project X (3)

3,00

3,00

6,00

6,00

✓

→ Project X

Planning Completed

5,00

- Click *Yes* to confirm the confirmation dialog.

### Confirm recall

Are you sure you want to recall the selected row?

#### 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)

The screenshot displays the 'My Approvals' view. On the left sidebar, the 'Approvals' option is highlighted with a red box and labeled '1'. The main content area has a title 'My Approvals' with a dropdown arrow. Below the title, there are navigation controls (Previous, Current, Next, 2025-46) and 'Approve'/'Reject' buttons, both highlighted with red boxes and labeled '2' and '4' respectively. A table of entries is shown below, with checkboxes in the first column highlighted by a red box and labeled '3'. The table has columns for 'Line Status', 'Submitter', and 'Project'.

| Line Status | Submitter      | Project    |
|-------------|----------------|------------|
| ✓           | Gabi Gantt (4) |            |
| → Submitted | Gabi Gantt     | Project X  |
| → Submitted | Gabi Gantt     | Project XY |
| → Submitted | Gabi Gantt     | Project XY |
| → Submitted | Gabi Gantt     | Project XY |
| □           |                |            |

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

➤ Click on *Confirm*.

**Confirm approval**

Are you sure you want to approve the selected row?

Add approval comments

Confirm

Cancel

**Confirm rejection**

Are you sure you want to reject the selected row?

Add rejection comments

Confirm

Cancel

## 21.6 View approved entries in the project

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

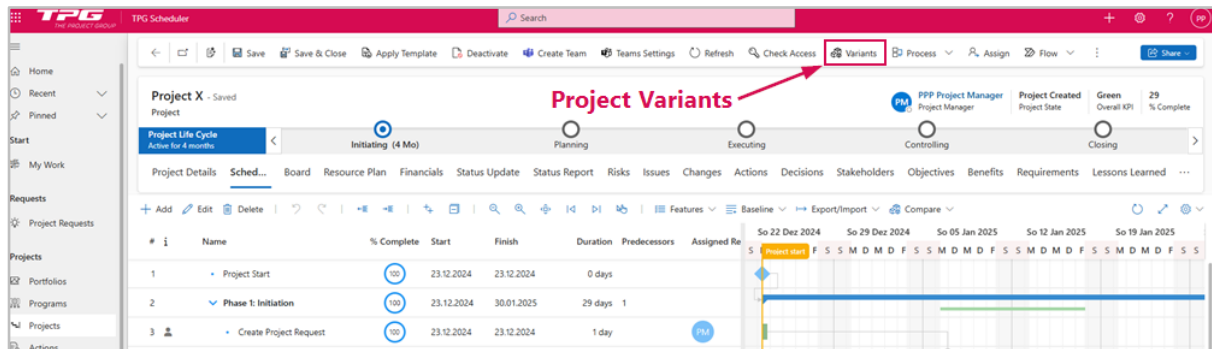
- Open the desired project.
- Navigate to the *Timesheets* tab. (If this is not visible, click on the 3 dots on the right and select *Timesheets* from the drop-down menu).
- ▶ All approved entries are displayed.

| Requests         | Project Details | Schedule | Board | Resource Plan | Commitments | Financials | Status Update | Status Report | Risks | Issues | Changes | Actions | Decisions | Stakeholders | Objectives | Benefits | Requirements | Timesheets | ... |
|------------------|-----------------|----------|-------|---------------|-------------|------------|---------------|---------------|-------|--------|---------|---------|-----------|--------------|------------|----------|--------------|------------|-----|
| Project Requests |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |
| Projects         |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |
| Portfolios       |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |
| Programs         |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |
| Projects         |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |
| Actions          |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |
| People           |                 |          |       |               |             |            |               |               |       |        |         |         |           |              |            |          |              |            |     |

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

## 22 Project Variants

The project variants feature is a 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.



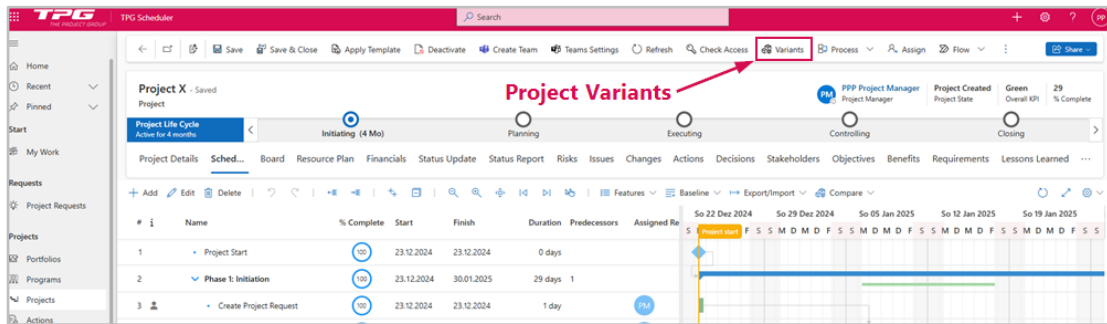
A variant is a copy of a project that can be edited without altering the original project. Variants can be compared with the original project and other variants in the schedule, resource plan, and financial plan. A new variant is created with a copy of the following tables:

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

## 22.1 User Interface

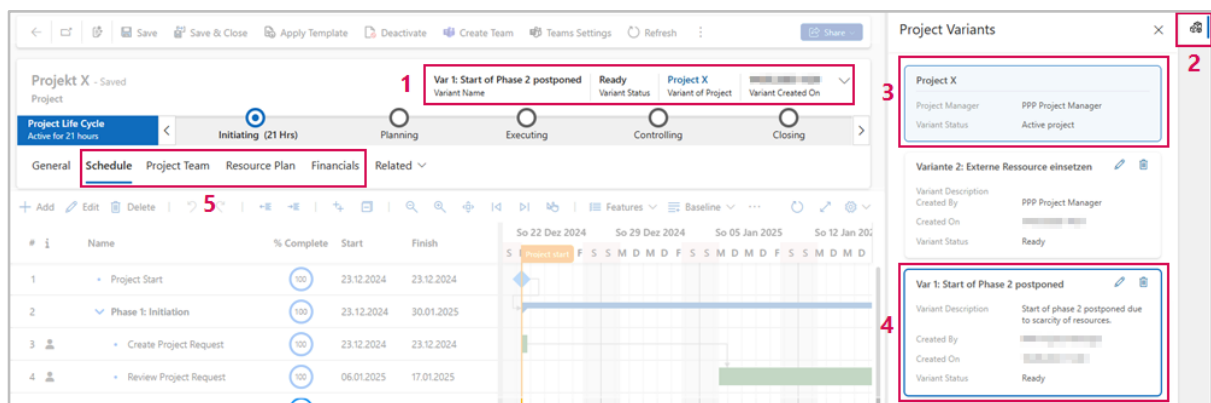
Project variants are created and opened in the *Project Variants* sidebar within the original project.

- To open the *Project Variants* sidebar, open the original project and click on *Variants* in the command bar .



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:

The screenshot displays the 'Project X - Saved' interface. At the top, there's a navigation bar with tabs: 'Project Life Cycle' (Active for 24 hours), 'Initiating (22 Hrs)', 'Planning', 'Executing', 'Controlling', and 'Closing'. Below this, a sub-navigation bar includes 'General', 'Schedule', 'Project Team', 'Resource Plan', 'Financials', and 'Related'. The main content area is divided into three sections:

- Variant Detail** (Header: Details current Variant):
  - Variant Name: Var 1: Start of Phase 2 postponed
  - Variant Description: Start of phase 2 postponed due to scarcity of resources.
  - Variant of Project: Project X
  - Is Variant: Yes
- General** (Header: General Information on the Original Project and Variant):
  - Name: Project X
  - Description: [Empty field]
  - Owner: PPP Project Manager / Office
  - Program: [Empty field]
  - Project State: Project Created
  - Variant Status: Ready
  - Variant Created On: 11/20
  - Project Request: [Empty field]
- Project Estimates**:
  - % Complete: 29
  - Start Date: 23.12.2024
  - Finish Date: 06.05.2025
  - Duration: 97.00
  - Effort: 224.50

At the bottom, there's a section for 'Current Project Detail' (Header: Details Original Project) with a 'General' tab.

## 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  282
- Edit a Variant  286
- Compare Variants and Original Projects  289

### 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**. ➤ The *Project Variants* sidebar will open. This area displays all previously created variants of the project.

The screenshot shows a sidebar titled "Project Variants" with a close button (X) in the top right corner. It contains three variant cards:

- Project X**: Project Manager: PPP Project Manager, Variant Status: Active project.
- Var 2: Use external resource**: Variant Description: (empty), Created By: (empty), Created On: (empty), Variant Status: Ready.
- Var 1: Start of Phase 2 postponed**: Variant Description: Start of phase 2 postponed due to scarcity of resources, Created By: (empty), Created On: (empty), Variant Status: Ready.

At the bottom of the sidebar is a blue button with a plus icon and the text "Add".

- 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)

Project Variants

×

Variant Name \*

1 Var 1: Start of Phase 2 postponed

Variant Description

2 Start of phase 2 postponed due to scarcity of resources.

3

Create

Cancel

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

Project Variants

Project X

Project Manager

PPP Project Manager

Variant Status

Active project

Var 2: Use external resource

Variant Description

Created By

Created On

Variant Status

Ready

Var 1: Start of Phase 2 postponed

Variant Description

Created By

Created On

Variant Status

Start of phase 2 postponed due to scarcity of resources.

Ready

- 
- 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.

Project Variants

Project X

Project Manager

PPP Project Manager

Variant Status

Active project

Var 2: Use external resource

Variant Description

Created By

Created On

Variant Status

Ready

Var 1: Start of Phase 2 postponed

Variant Description

Created By

Created On

Variant Status

Start of phase 2 postponed due to scarcity of resources.

Ready

- Click on the desired variant or on the edit icon for the variant. ➤ The corresponding project plan opens.

Var 1: Start of Phase 2 postponed

Variant Description

Created By

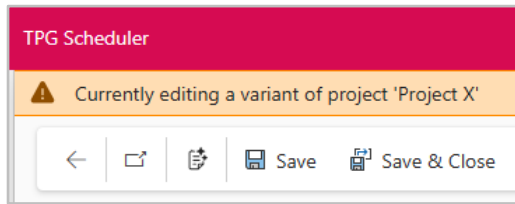
Created On

Variant Status

Start of phase 2 postponed due to scarcity of resources.

Ready

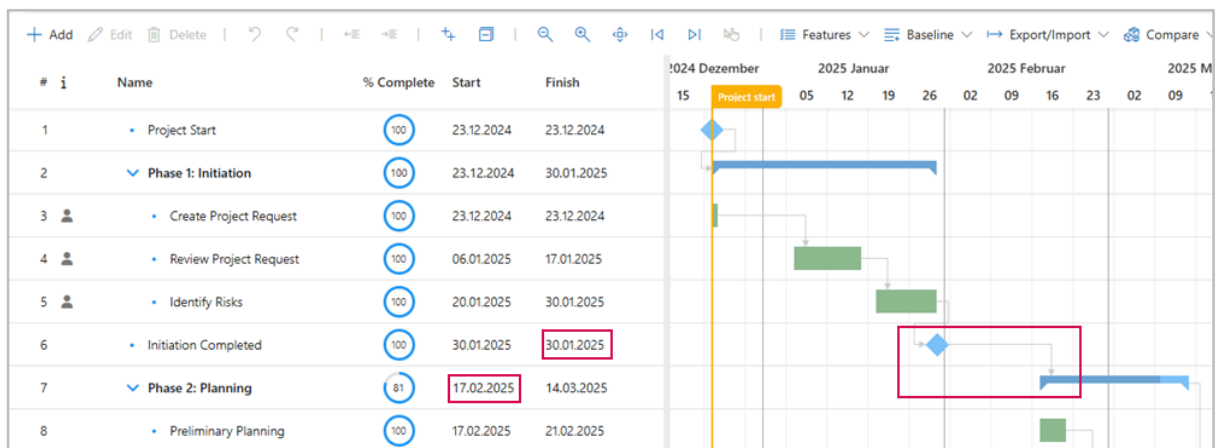
For a short time, a banner under the **Header Bar**<sup>11</sup> indicates that you are editing a variant.



- 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**<sup>37</sup>, **Resource Planning**<sup>92</sup> and **Budget Planning**<sup>112</sup>.

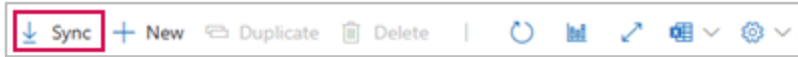
### Example:

In this example, the schedule is changed: An interval of 10 working days is inserted before phase 2. The variant project thus ends 2 weeks later than the original project.



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

- Open the *Resource Plan* tab and click on *Sync*. ► The *Synchronise rows* dialog box opens.



- Click *Overwrite existing*.
- Click *Include working values* if you also want to transfer the working values.
- Click on *Update*.

A screenshot of a dialog box titled 'Synchronise rows'. It contains the text 'Synchronise tasks and team members with this resource plan'. Below this, there are two checked checkboxes: 'Overwrite existing' and 'Include work values'. At the bottom right, there are two buttons: 'Update' (in blue) and 'Cancel' (in white).

- 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](#)<sup>112)</sup>)

#### Delete Variant:

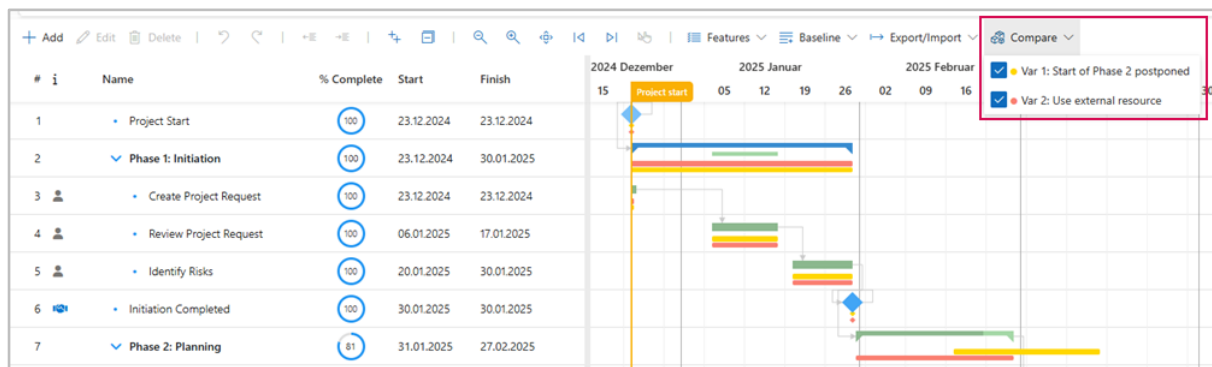
- In the *Project Variant* sidebar, select the variant you want to delete.
- Click on the delete icon.

A screenshot of a sidebar showing project variants. The selected variant is 'Var 1: Start of Phase 2 postponed'. Below the title, there is a table with details: 'Variant Description' (Start of phase 2 postponed due to scarcity of resources), 'Created By' (a blurred name), 'Created On' (a blurred date), and 'Variant Status' (Ready). In the top right corner of the variant card, there are two icons: a pencil (edit) and a trash can (delete). The trash can icon is highlighted with a red rectangular box.

### 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.



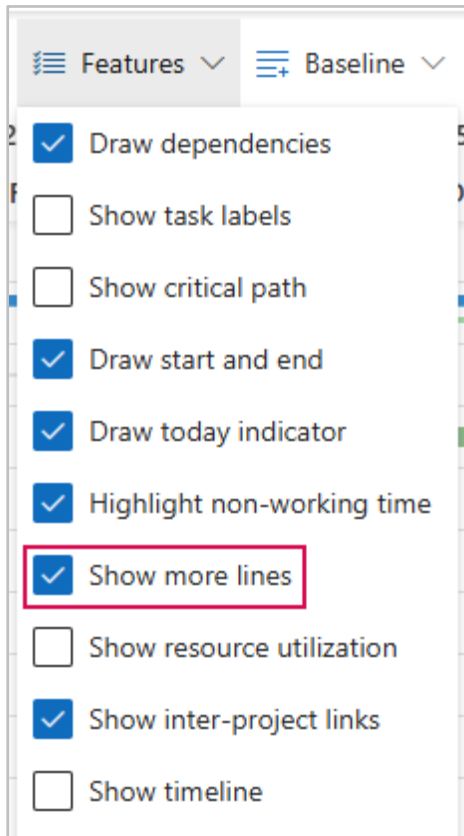
- You can select up to 3 variants for comparison in the schedule.
- A colored dot in front of the selected variant indicates the color in which the process bar is displayed in the Gantt chart.
- On the *Resource Plan* and *Financials* tab, you can compare all variants at once. These are displayed one below the other in the table.

| Variant Name                 |
|------------------------------|
| > Project X(3)               |
| > Var 1: Start of Pha... (5) |
| > Var 2: Use extern... (3)   |

The compact view is recommended for a better overview.

- In the schedule:

➤ Click on *Features* and select *Show more lines*.



- In the Resource or Financials plan:

➤ Click on Settings (gear wheel) and select *Show more lines*.

