TPG PortfolioManager User Guide 4.4

Version: 4.4.0
Status: 9/4/2025

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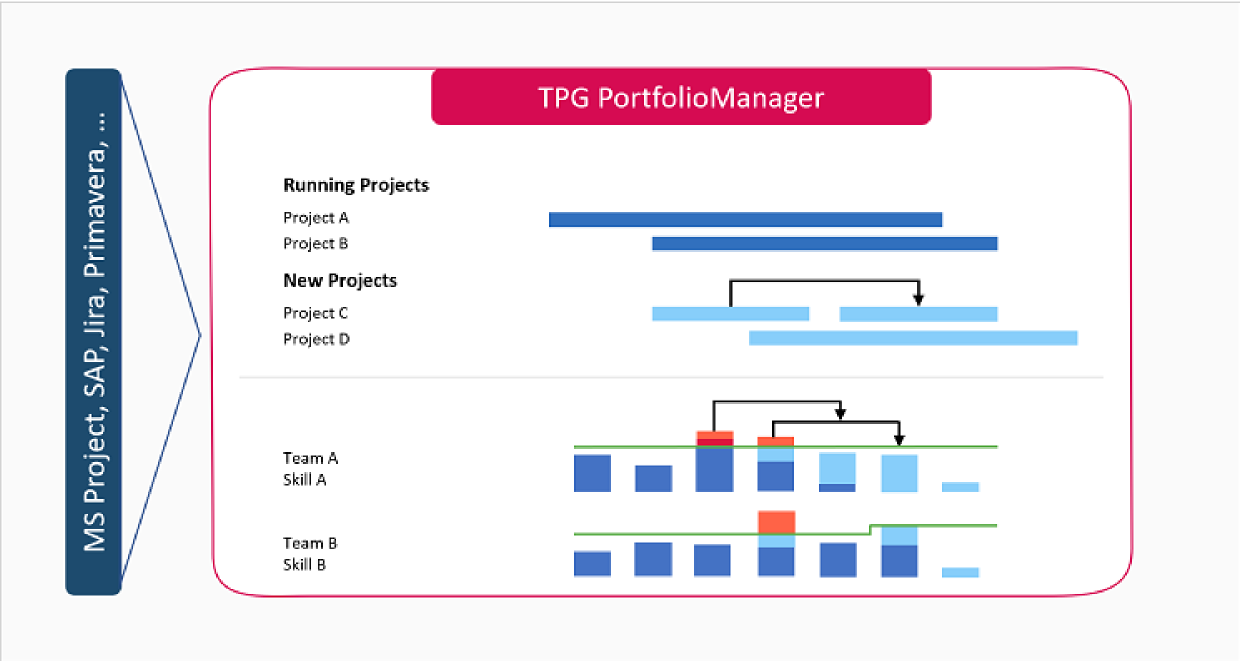
1 General Features

TPG PortfolioManager enables project planning to be optimized according to resource availability. To do this, the projects in a portfolio are loaded as one-liners in scenarios and their resource usage is displayed in histograms or heat maps. Current and new projects are differentiated by color.

The projects and resources can be sorted, grouped and filtered in order to view the resource situation from different perspectives. Resource overloads and underloads must be identified and eliminated if possible.

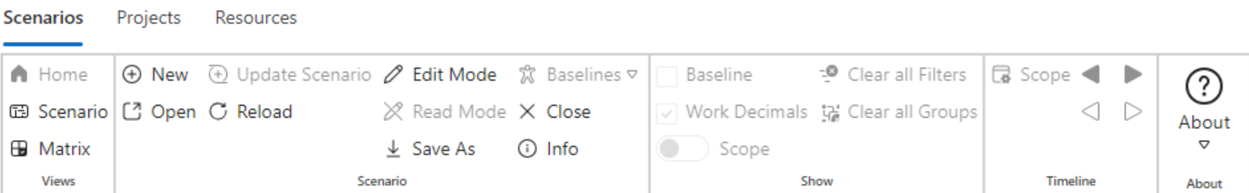
For this purpose, projects can be activated or deactivated within a scenario, or they can be postponed until the resource utilization is appropriate. In addition, the capacity of resources can be adjusted to compensate for overloads or underloads.

Projects can be imported from external systems such as Microsoft Project, Atlassian Jira, or SAP.

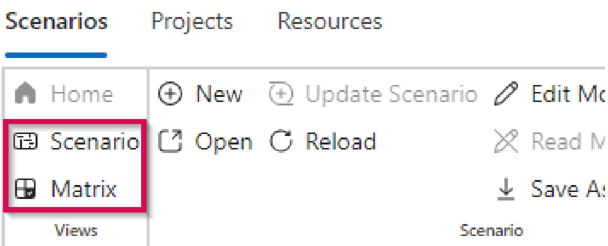


2 Work Interface and Views

When you open TPG PortfolioManager, the *Scenario* tab is opened by default. All functions of TPG PortfolioManager are on the *Scenario*, *Projects* and *Resources* tabs. Changing the tab will change the menu bar, not the page content.



There are two views for planning which can be accessed via the buttons in the *Views* group of the *Scenario* tab:



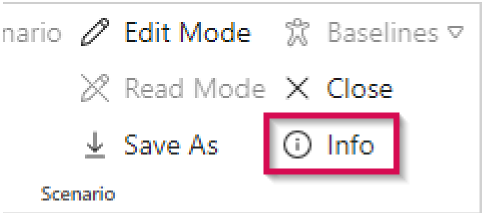
Scenario 8: Main view for your work: Analysing the resource situation, shifting projects and resource assignments to optimize the resource utilization

Matrix 33: Assignment of resources to projects in a matrix view

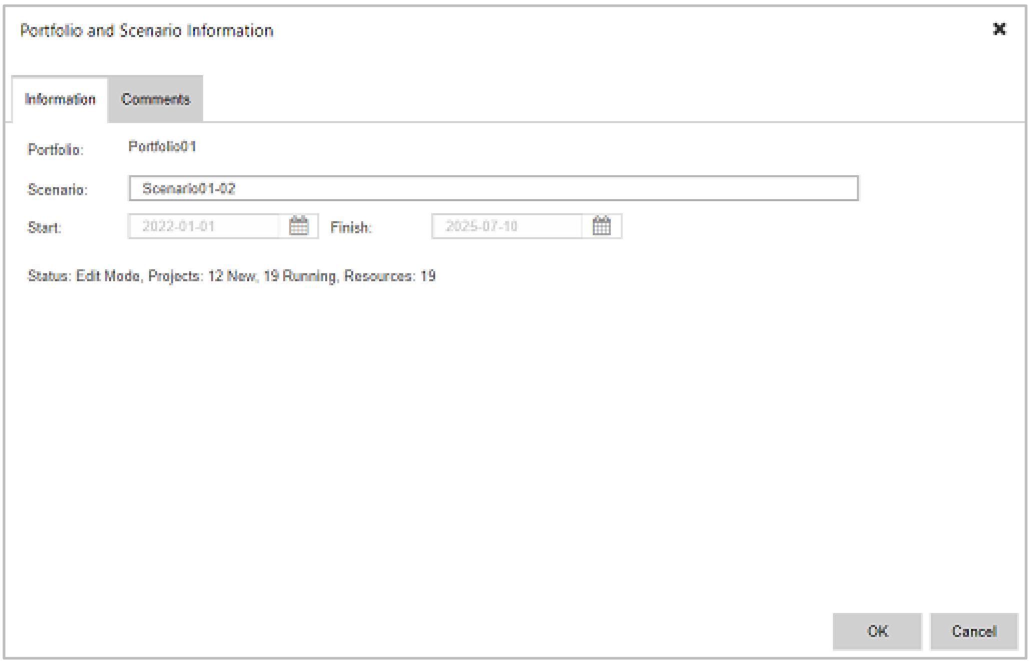
The data can be edited independently of other scenarios: Editing projects or resources that are also stored in other scenarios has no mutual effect.

2.1 Scenario information and comments

Basic information about the currently opened scenario (see Checking in and out 41) can be accessed via the *Info* button in the *Scenario* group of the menu bar.

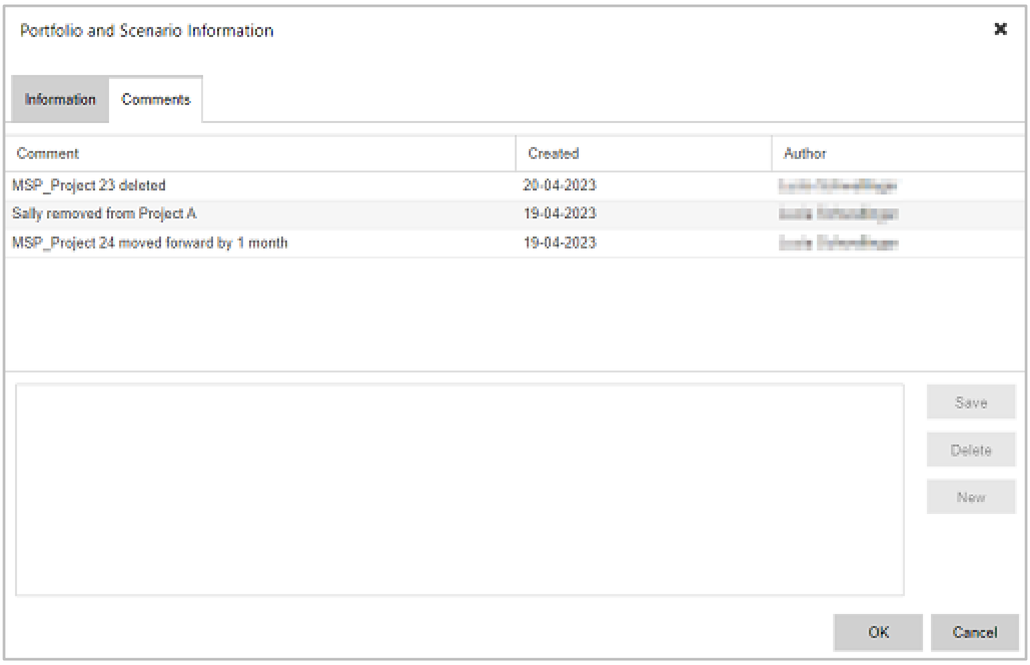


Besides the portfolio and scenario name, you will see
- the start and finish date (read-only)
- the current access mode
- the number of new and running projects
- the number of resources



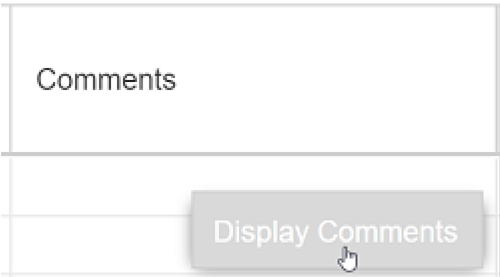
If filters have been applied, the project and resource numbers of the filtered view will be shown.

The *Comments* tab shows general comments on the scenario, listing the latest comment on top. See also Entering/Deleting general comments 49.



The scenario comments can also be accessed via the *Comments* column in the project or resource table of the *Scenario* view:

- Right-click in the scenario row of the *Comments* column and click *Display Comments*.



Once the comments have been accessed via the *Comments* column, the last saved comment will be shown in the table.

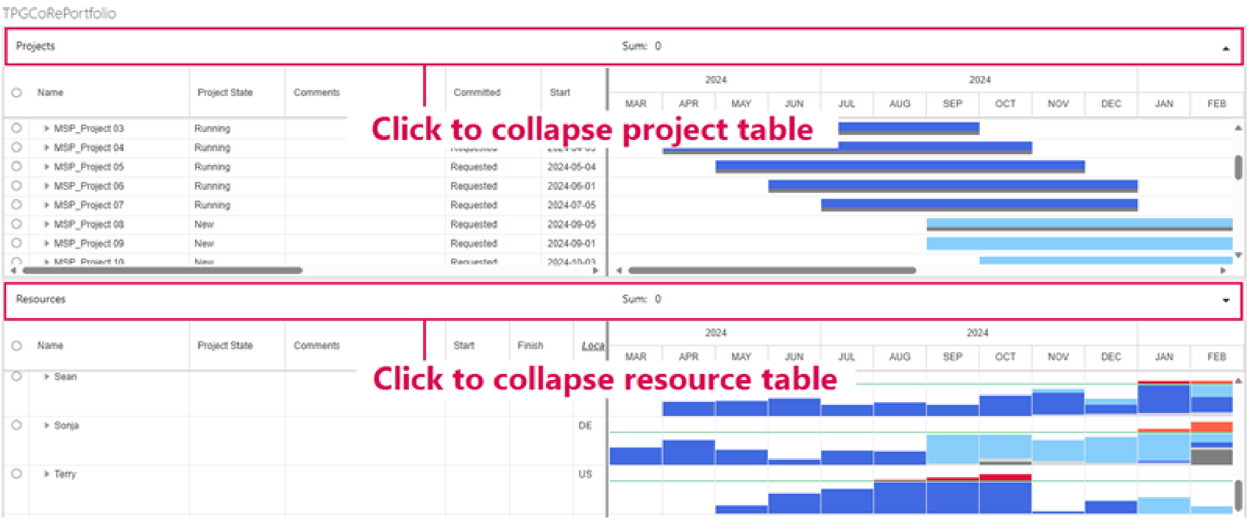
2.2 Scenario

Scenario is the main view for analysing and running through various options. You can open one scenario at a time. When a scenario is opened (see Checking in and out 41), this view opens by default.

A scenario shows the projects and resources of a portfolio in a combined table:
The project table 9 shows the data grouped by projects.
The resource table 11 shows the data grouped by resources.

Under the timeline on the right, the default setting shows the project duration as a bar chart and the resource utilization as a histogram. Project state and categories of work data are differentiated by color.

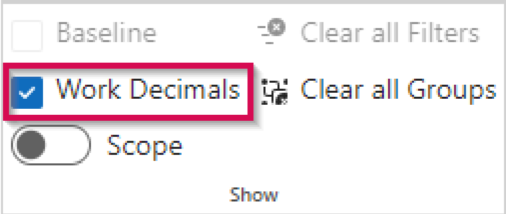
The fields in the left part of the table can be edited except the date fields, *Name*, *Modified by and Total*.



Both tables can be collapsed or expanded by clicking in the area above the table.

Sub-items show the assigned work as numeric values under the timeline.

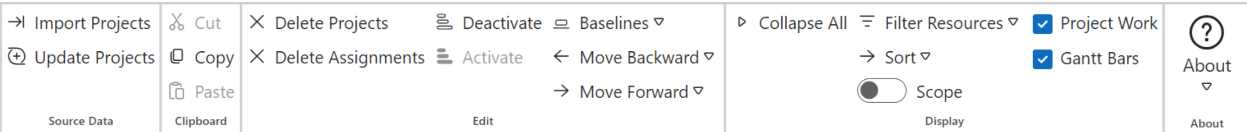
- If you want to see the values without decimals, deselect *Work Decimals* in the *Show* group of the menu bar.
  Non-integer values will be displayed as rounded.



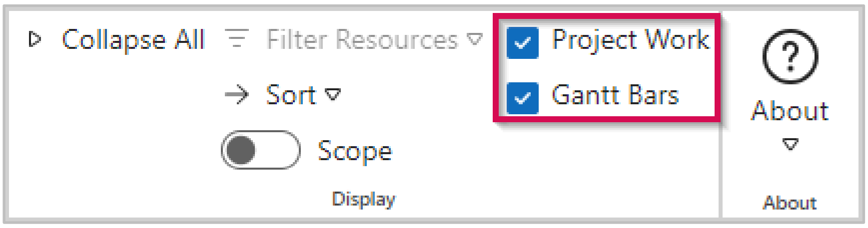
Work data can be entered both in the project table and the resource table.

2.2.1 Project table

The project table lists all projects of the opened scenario. Assigned resources are shown as sub-items. Entries above the first project show the aggregated data of the scenario projects.
As soon as the cursor is placed in the project table, the *Projects* tab is opened.

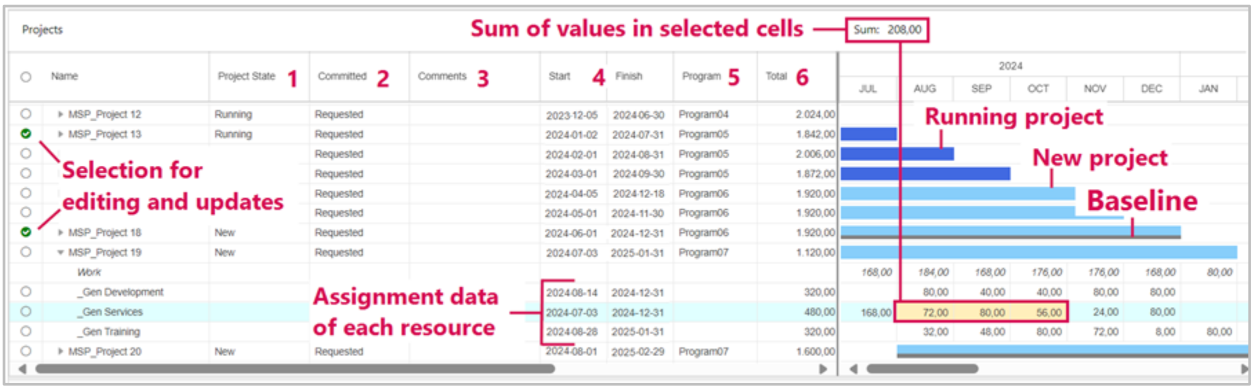


➤ The *Work* row mentioned below and the Gantt bars are shown by default. You can hide or unhide them by using the respective checkbox in the *Show* group of the *Projects* tab.

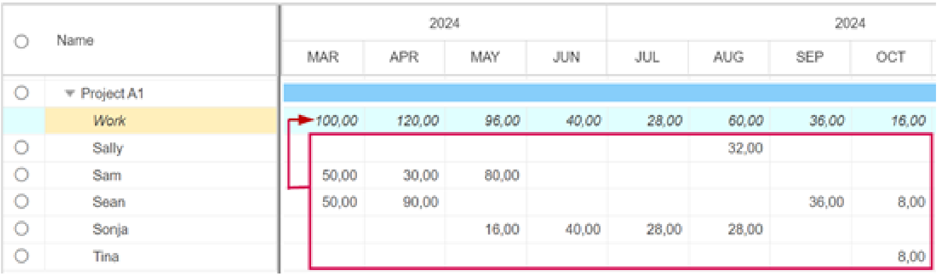


Columns:

1) *Project State*: The value is *Running* or *New* and is shown in the bar chart by color. The colors can be changed by the administrator. The project state can be changed manually 54 by the user.
2) *Committed:* The value is *Requested* or *Committed* and refers to the assigned work. By default, the table shows requested work hours. The value can be changed manually 70 by the user but committed work hours will only be shown if TPG TeamManager is used for resource commitments.
3) *Comments*: Comments can be entered in the rows of the project names. General scenario comments can be accessed via right-click in the scenario row > *Display Comments*.
4) *Start/Finish*: Start and finish date of the project (project row) or the assigned work (resource row)
5) *Program*: Custom field showing the program to which a project belongs
6) *Total*: Total amount of work assigned to each project (project row) or resource (resource row)



The *Work* row is read-only. It shows the sum of project work of the assigned resources per time phase.

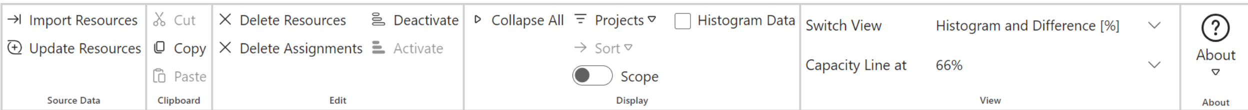


2.2.2 Resource table

The resource table lists all resources of the opened scenario. The projects to which the resources are assigned are shown as sub-items.

Entries above the first resource show the aggregated data of all scenario resources.

As soon as the cursor is placed in the resource table, the *Resources* tab is opened.



A colored histogram is shown only for resources whose capacity is greater than zero. Generic resources have a default capacity of zero, so the chart space under the timeline is gray.

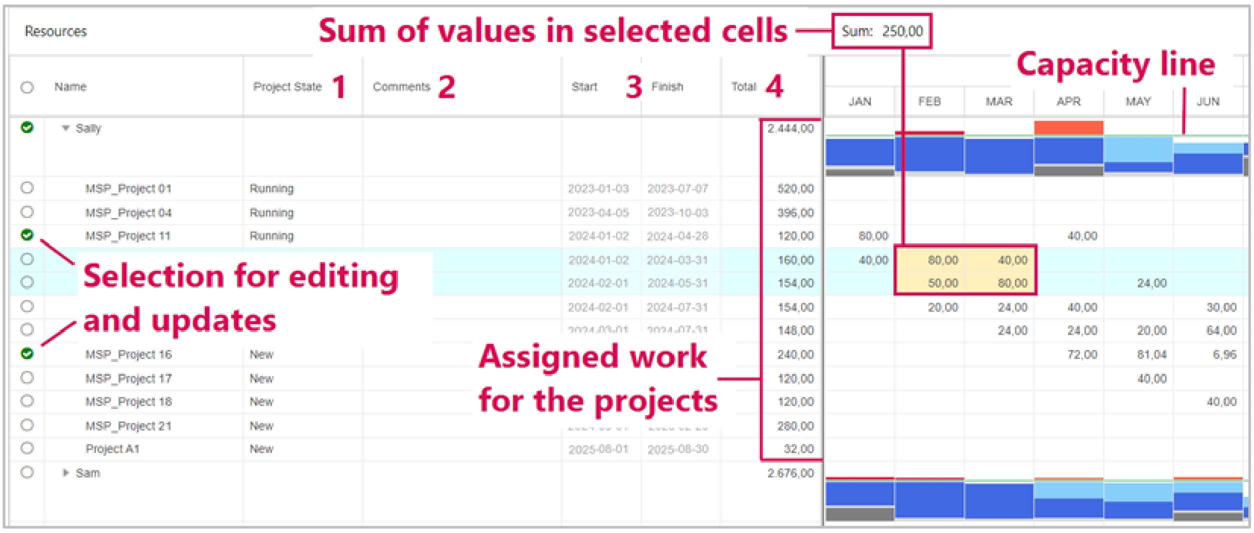
Columns:

1) *Project State*: Value *Running* or *New* according to the setting in the project table. In the resource table, this field is read-only.

2) *Comments*: Comments can be entered in the rows of the resource names. General scenario comments can be accessed via right-click in the scenario row > *Display Comments*.

3) *Start/Finish*: Start and finish date of the assigned work

4) *Total*: Amount of project work assigned to the resource in total (resource row) or for the project (project row)



Dark blue: Regular work for running projects

Light blue: Regular work for new projects

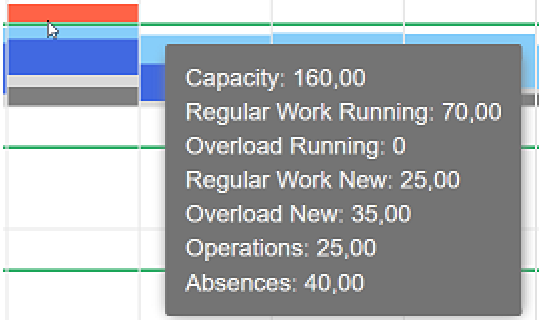
Red: Overload caused by work for running projects

Orange: Overload caused by work for new projects

Dark gray: Absences

Light gray: Line operations

A tooltip in each time phase shows these data and the capacity in hours:

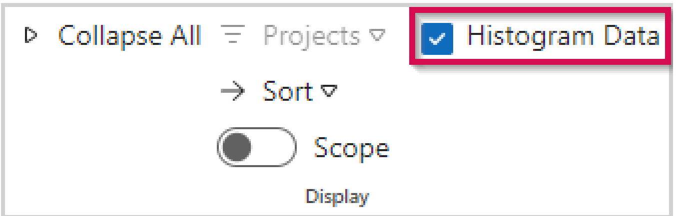


To display more detailed data in the table, see Histogram data 13.

The histogram can be switched to a heatmap 16.

Histogram data

➤ Detailed histogram data are hidden by default. You can unhide or hide the rows by selecting *Histogram Data* in the *Show* group of the *Resources* tab.



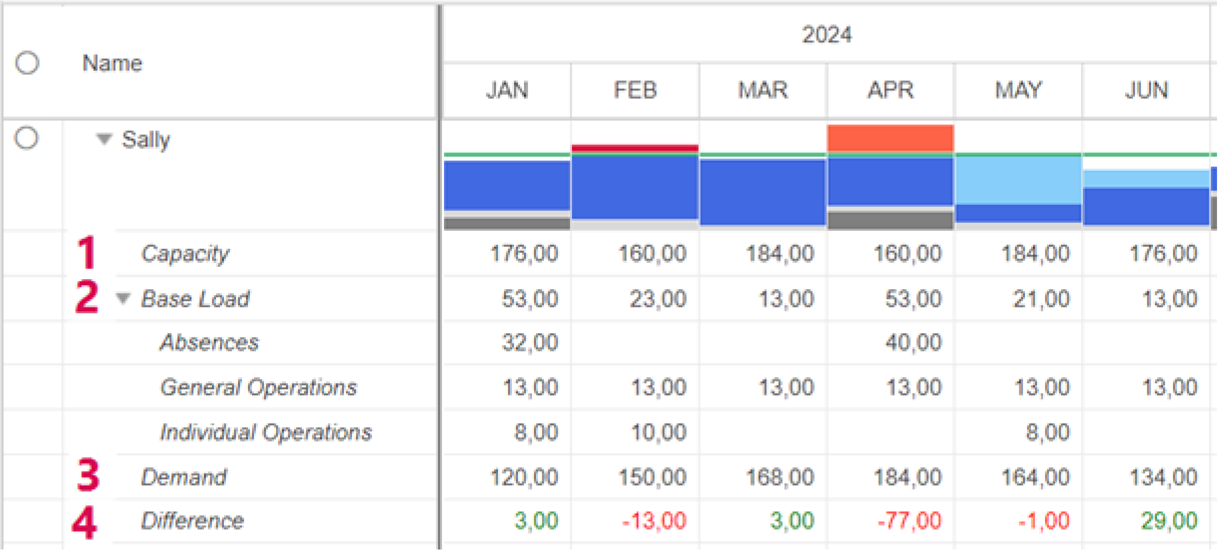
Histogram data rows:

1) *Capacity*: Capacity of the resource in hours

2) *Base Load*: Working hours not available for project work. It is calculated by:
   base load = absences + general operations + individual operations

3) *Demand*: Total amount of project work assigned to the resource

4) *Difference:* Remaining availability of the resource. It is calculated by:
   difference = capacity – (base load + demand)
   Green numbers indicate remaining availability.
   Red numbers indicate overload.
   Empty fields indicate that the difference between capacity and planned work is zero.



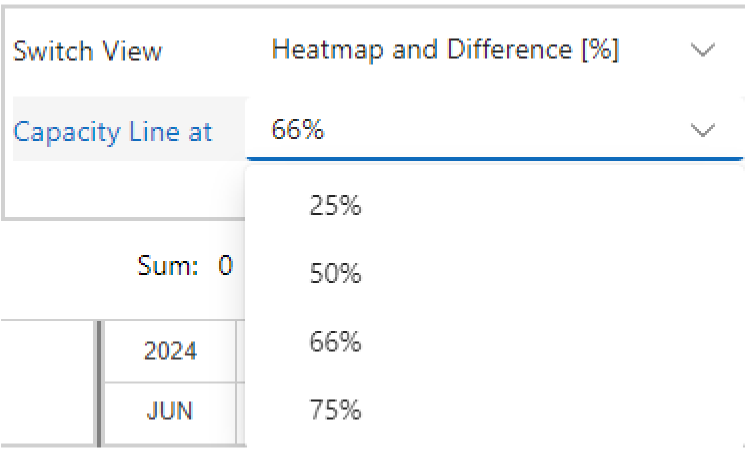
	Name	JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024
	Sally						
1	Capacity	176,00	160,00	184,00	160,00	184,00	176,00
2	Base Load	53,00	23,00	13,00	53,00	21,00	13,00
	Absences	32,00			40,00		
	General Operations	13,00	13,00	13,00	13,00	13,00	13,00
	Individual Operations	8,00	10,00			8,00	
3	Demand	120,00	150,00	168,00	184,00	164,00	134,00
4	Difference	3,00	-13,00	3,00	-77,00	-1,00	29,00

The *Difference* values can be displayed in the chart (see Histogram view options 15).

Capacity line

By default, the capacity line in the histogram is set to 66% of the row height. Sometimes it may be helpful to adjust this value. For example, if there is a very high overload, a lower capacity line helps to better estimate the ratio between capacity and overload.

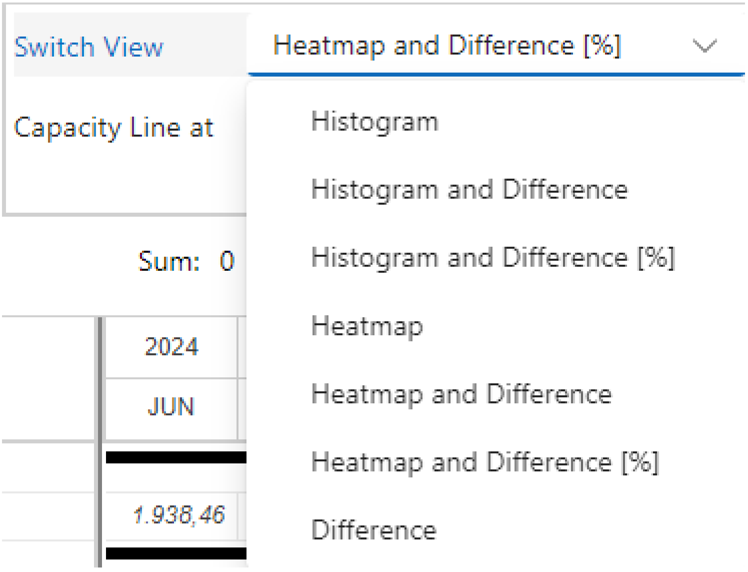
- Go to the *View* group of the *Resources* tab.
- Open the drop-down menu next to *Capacity Line at* and select the desired value.



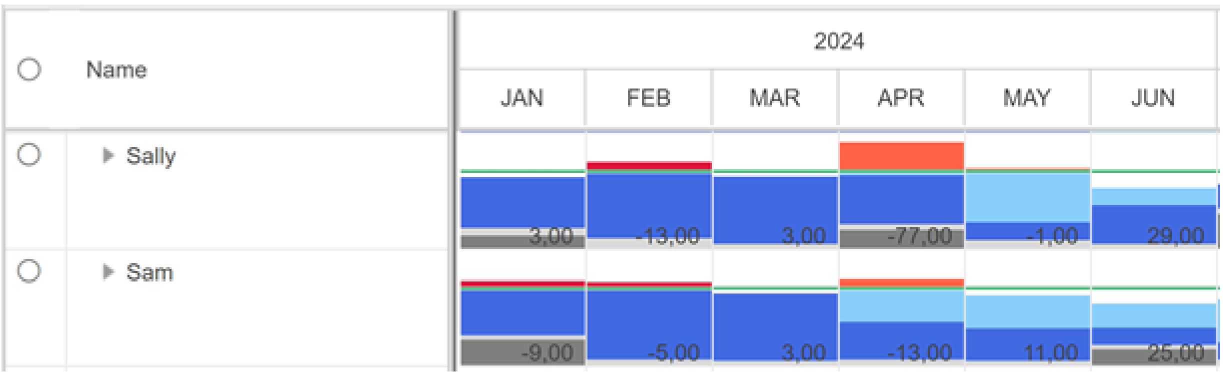
Histogram view options

By default, the resource chart shows the histogram without numerical values. You can add the difference between capacity and planned work in hours or percent.

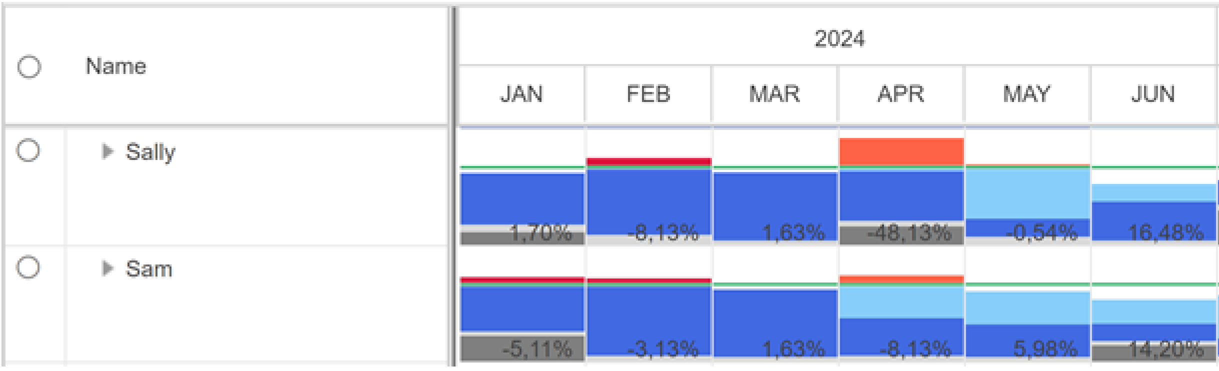
- To add the numerical values, go to the *View* group of the *Resources* tab.
- Open the drop-down menu next to *Switch View and s*elect the desired histogram view.



Histogram and Difference shows the histogram with numerical values in hours.



Histogram and Difference [%] shows the histogram with numerical values in percent of the capacity.

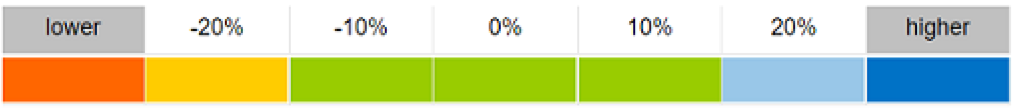


If the difference between capacity and planned work is shown in the histogram, the *Difference* row will not be shown in the table.

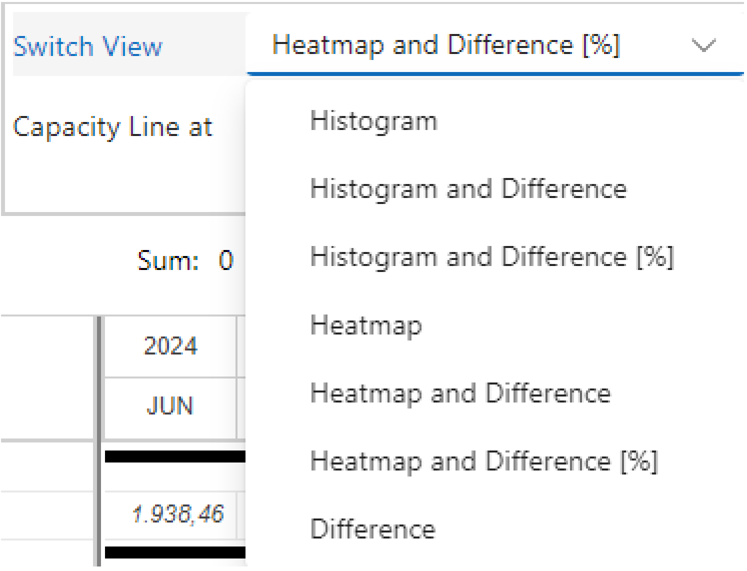
Heatmap view options

The histogram can be switched to a heatmap showing the difference between capacity and planned work of the resources by colors. The colors are displayed according to preset thresholds.
In addition, the numeric values of the difference between capacity and planned work can be shown in the chart in hours or percent.

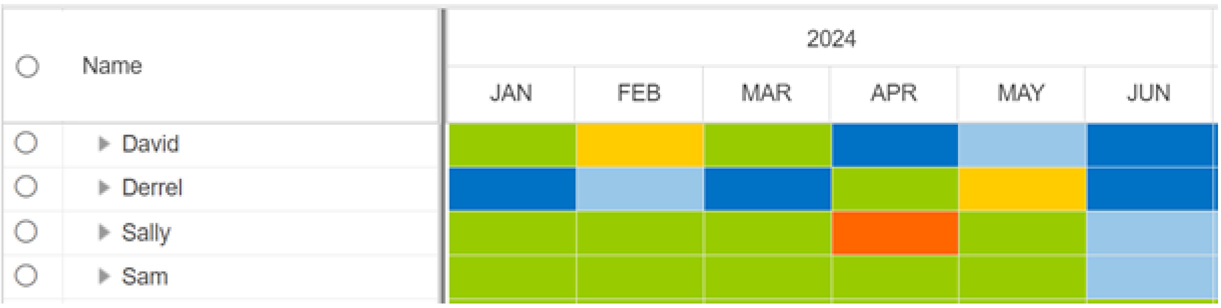
By default, yellow indicates that the resource is overloaded with more than 10% of their capacity, red indicates an overload of more than 20%.
Light and dark blue fields indicate that the resource has free capacity of more than 10% or 20% respectively.



- To switch to the heatmap, go to the *View* group of the *Resources* tab.
- Open the drop-down menu next to *Switch View* and select the desired heatmap view.



Heatmap shows the heatmap without numerical values.



Heatmap and Difference shows the heatmap with values in hours.

	Name	2024					
		JAN	FEB	MAR	APR	MAY	JUN
○	▸ David	0	-24,00	4,00	32,00	28,00	64,00
○	▸ Derrel	56,00	24,00	40,00	6,00	-26,00	136,00
○	▸ Sally	3,00	-13,00	3,00	-77,00	-1,00	29,00
○	▸ Sam	-9,00	-5,00	3,00	-13,00	11,00	25,00

Heatmap and Difference [%] shows the heatmap with values in percent of the capacity.

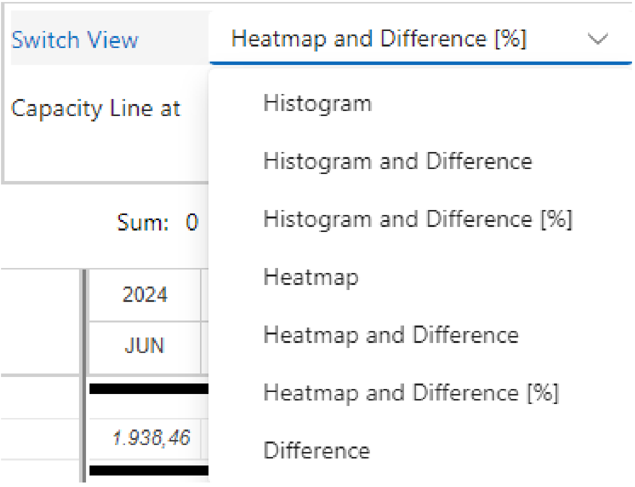
	Name	2024					
		JAN	FEB	MAR	APR	MAY	JUN
○	▸ David	0%	-15,00%	2,17%	20,00%	15,22%	36,36%
○	▸ Derrel	31,82%	15,00%	21,74%	3,75%	-14,13%	77,27%
○	▸ Sally	1,70%	-8,13%	1,63%	-48,13%	-0,54%	16,48%
○	▸ Sam	-5,11%	-3,13%	1,63%	-8,13%	5,98%	14,20%

If the difference between capacity and planned work is shown in the heatmap, the *Difference* row will not be shown in the table.

Difference view

Histogram and heatmap can be replaced with numerical values showing the difference between capacity and planned work in hours. Negative *Difference* values are shown in red. This can be helpful to get a quick overview of the time phases and degree of overloads.

- To activate this view, go to the *View* group of the *Resources* tab.
- Open the drop-down menu next to *Switch View and s*elect *Difference*.



Green numbers indicate remaining availability.

Empty fields indicate that the difference between capacity and planned work is zero.

Name	2024					
	JAN	FEB	MAR	APR	MAY	JUN
David		-24,00	4,00	32,00	28,00	64,00
Derrel	56,00	24,00	40,00	6,00	-26,00	136,00
Sally	3,00	-13,00	3,00	-77,00	-1,00	29,00
Sam	-9,00	-5,00	3,00	-13,00	11,00	25,00

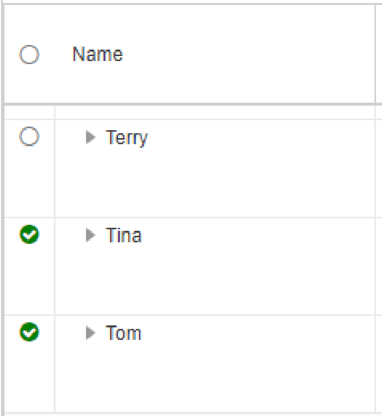
When the *Difference* view is selected, the *Difference* row will not be shown in the table.

2.2.3 Project filter based on resources

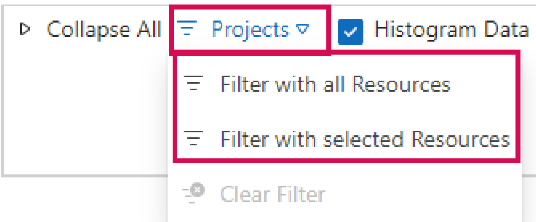
The project table can be filtered for projects to which specific resources are assigned.

The projects can be displayed with the entire project team or with the selected resources only.

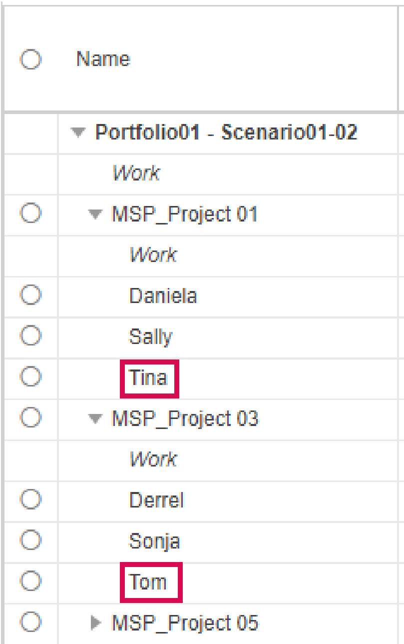
- To filter the project list, go to the resource table and select the resource(s) whose projects you want to see.



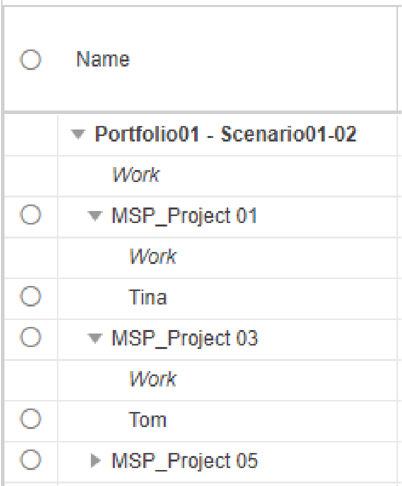
- Open the *Filter Projects* drop-down menu in the *Show* group of the *Resources* tab and select the desired filter.



Filter with all Resources shows the projects to which at least one of the selected resources is assigned, and all resources assigned to these projects.

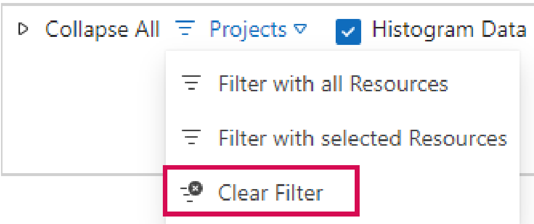


Filter with selected Resources shows the projects to which at least one of the selected resources is assigned, and the selected resources only.



➤ The project filter can be combined with the resource filter based on projects 22, the scope filter 25 and the filter based on custom field values 26. With multiple filters applied, the data shown in the scenario reflect the intersection of the selected filter criteria.

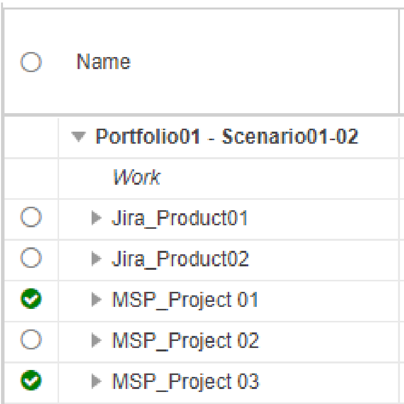
- To remove the filter, open the *Filter Projects* drop-down menu and select *Clear Filter*.



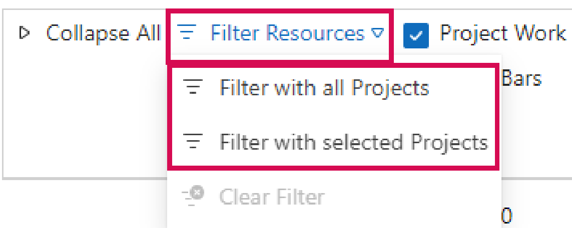
2.2.4 Resource filter based on projects

The resource table can be filtered for resources who are assigned to specific projects.
The resources can be displayed with all their projects or with the selected projects only.

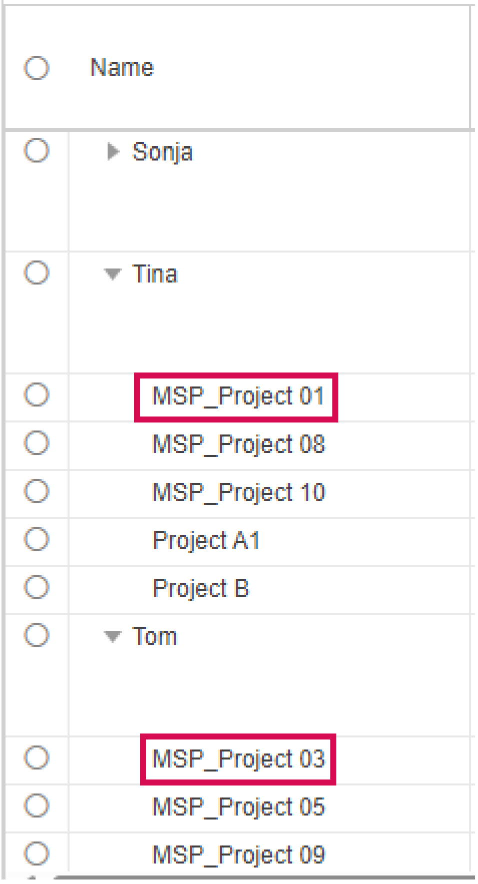
- To filter the resource list, go to the project table and select the project(s) of which you want to see the resources.



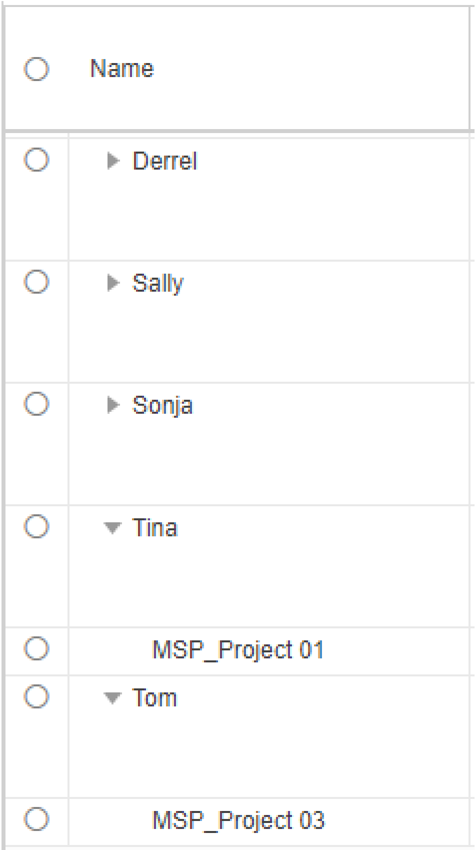
- Open the *Filter Projects* drop-down menu in the *Show* group of the *Projects* tab and select the desired filter.



Filter with all Projects shows the resources who are assigned to at least one of the selected projects, and all projects to which these resources are assigned.

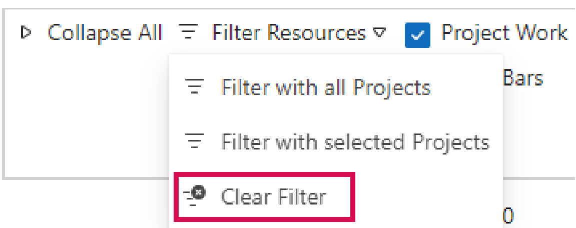


Filter with selected Projects shows the resources who are assigned to at least one of the selected projects, and the selected projects only.



➤ The resource filter can be combined with the project filter based on resources 19, the scope filter 25 and the filter based on custom field values 26. With multiple filters applied, the data shown in the scenario reflect the intersection of the selected filter criteria.

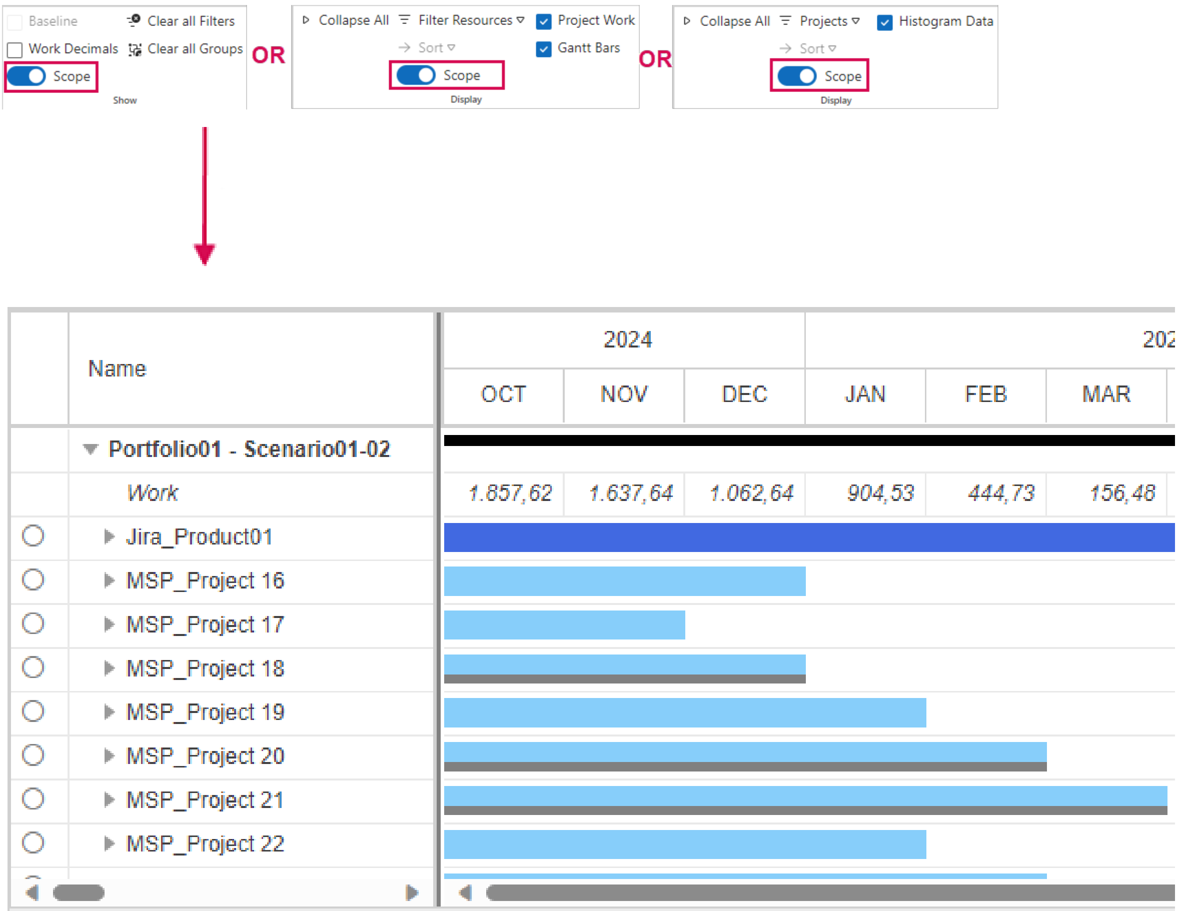
- To remove the filter, open the *Filter Projects* drop-down menu and select *Clear Filter*.



2.2.5 Projects in timeline scope

To see only projects and resources that have assignments in the actual timeline scope, you can filter out all other projects.

- Click the *Scope* filter in the *Show* group of the menu bar.
  This button is on the menu bar of the *Scenario*, the *Projects* and *Resources* tab. Its toggle status will be maintained between browser sessions.



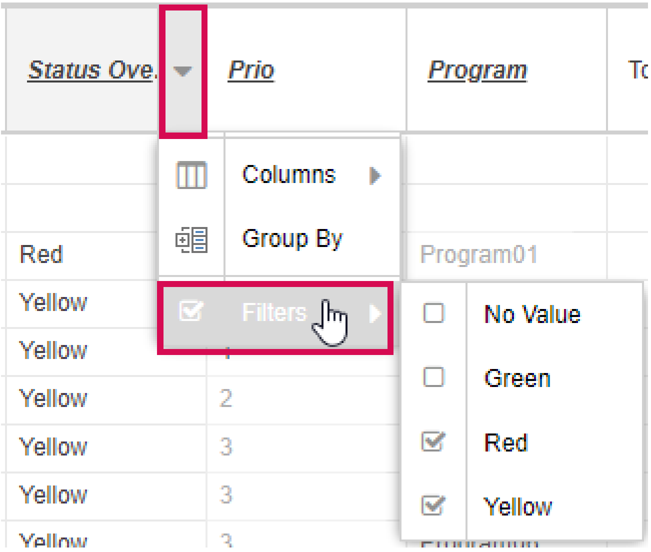
➤ This filter can be combined with the project filter based on resources 19, the resource filter based on projects 22 and the filter based on custom field values 26. With multiple filters applied, the data shown in the scenario reflect the intersection of the selected filter criteria.

- To remove the filter, click the *Scope* filter again.

2.2.6 Filter based on custom field values

Projects and resources can be filtered by the values of custom fields. For example, you can filter projects by status or resources by skill.

- Go to the desired column header, click the arrow that appears and go to *Filters*.
- Deselect or select the values of which you want to hide or show the projects and resources. With the *Filters* checkbox in the drop-down menu selected, the filter will be applied.



An underlined column header indicates that a filter is active.

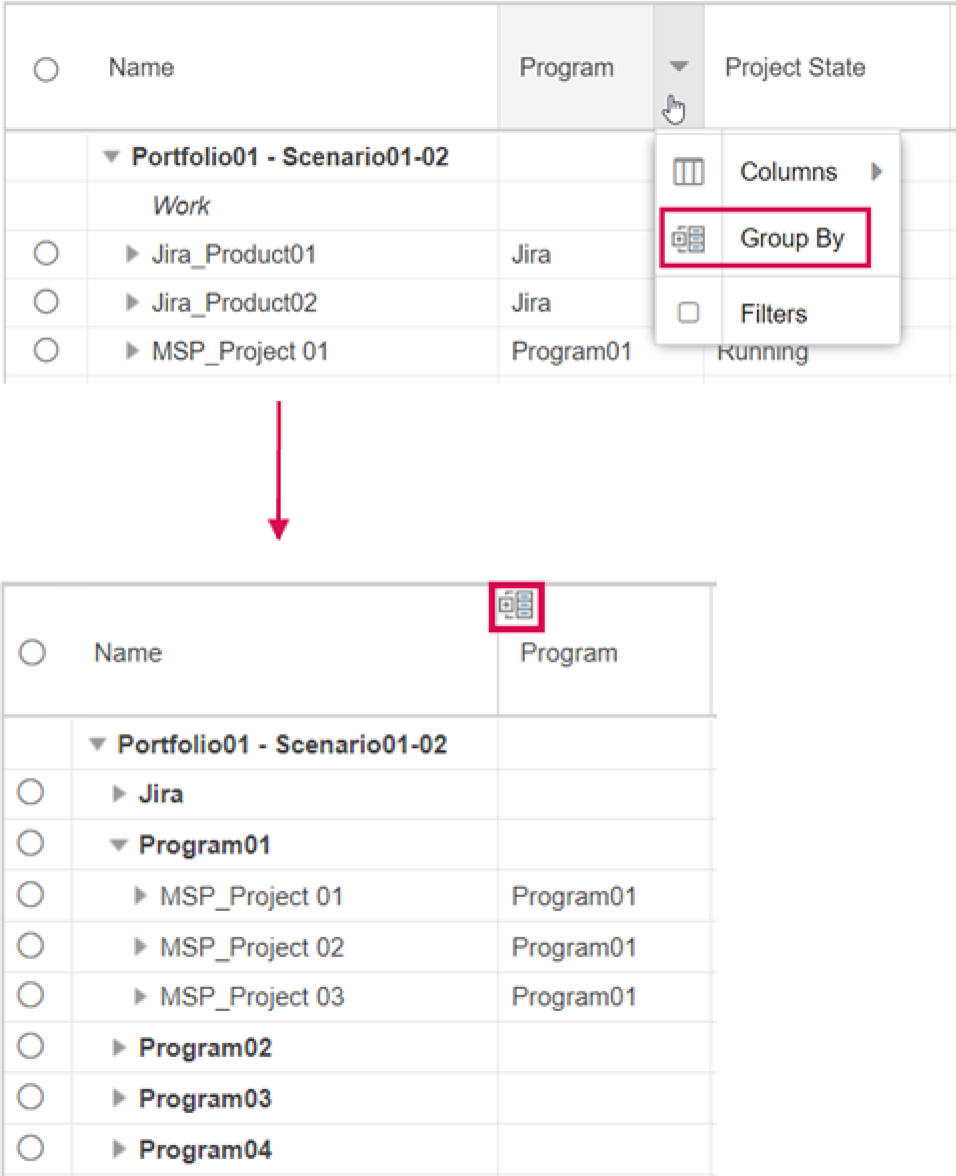
➤ The filter based on custom field values can be combined with the project filter based on resources 19, the resource filter based on projects 22 and the scope filter 25. With multiple filters applied, the data shown in the scenario reflect the intersection of the selected filter criteria.

- To remove the filter, deselect the *Filters* checkbox in the drop-down menu.

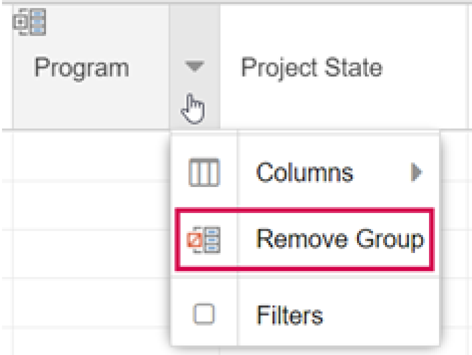
2.2.7 Row grouping

You can group the rows of the tables by specific column entries. Multiple groupings are possible. The first grouping performed is the main grouping.

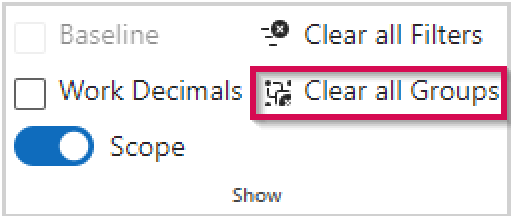
- Go to the desired column header, click the arrow that appears and select *Group By*. The grouping will be indicated by an icon in the column header.



- To undo the grouping, click the arrow in the column header and select *Remove Group*.



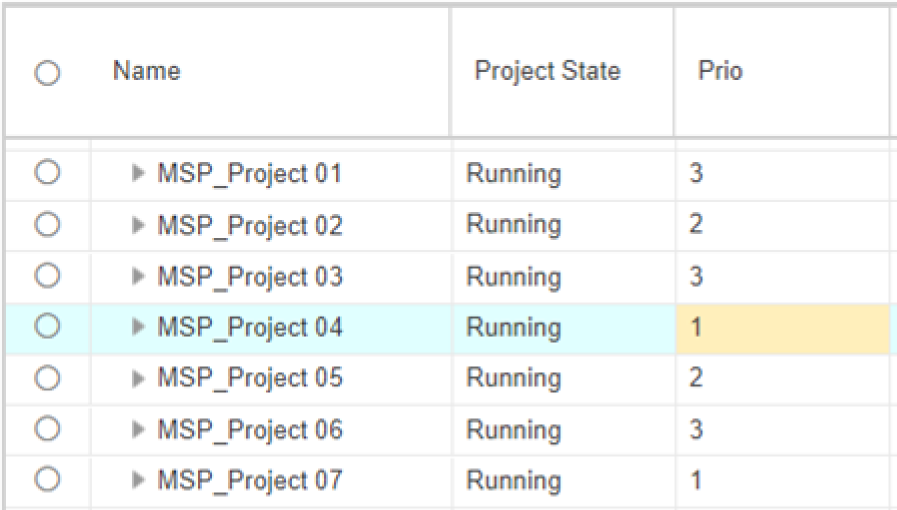
- To undo multiple groupings, open the *Scenario* tab and click *Clear all Groups* in the *Show* group.



2.2.8 Row sorting

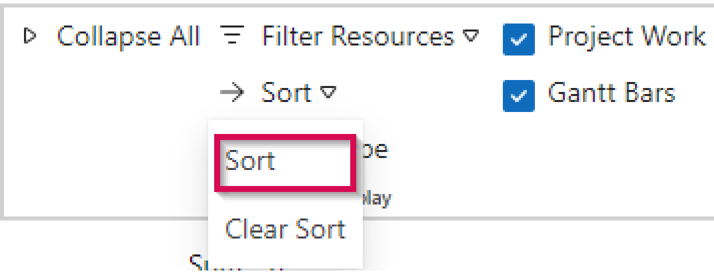
You can sort the rows of the tables by specific column entries.

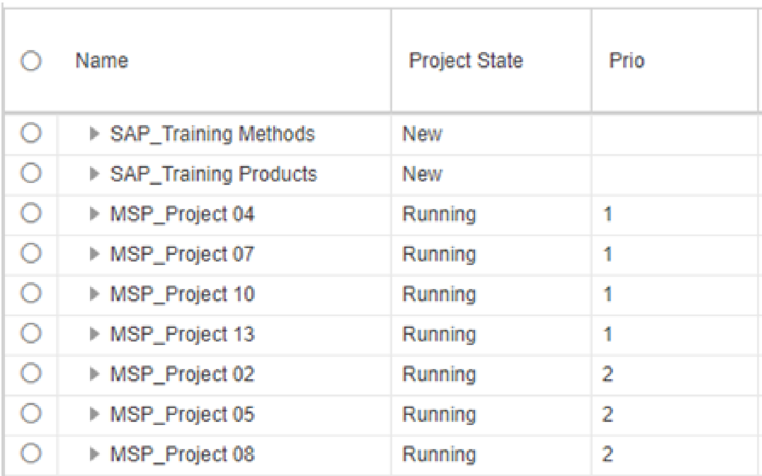
- Click in a cell of the desired column.
  In the example below, the project table shall be sorted by priority.



	Name	Project State	Prio
	MSP_Project 01	Running	3
	MSP_Project 02	Running	2
	MSP_Project 03	Running	3
	MSP_Project 04	Running	1
	MSP_Project 05	Running	2
	MSP_Project 06	Running	3
	MSP_Project 07	Running	1

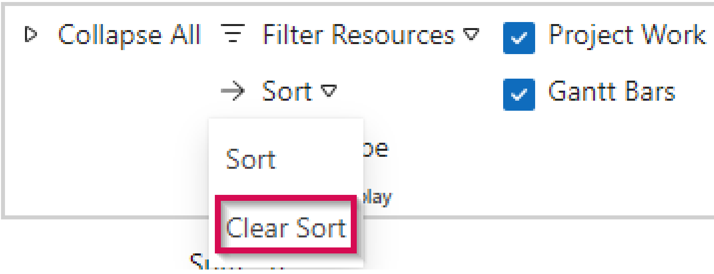
- Click *Sort* in the *Show* group of the respective tab.





	Name	Project State	Prio
	SAP_Training Methods	New	
	SAP_Training Products	New	
	MSP_Project 04	Running	1
	MSP_Project 07	Running	1
	MSP_Project 10	Running	1
	MSP_Project 13	Running	1
	MSP_Project 02	Running	2
	MSP_Project 05	Running	2
	MSP_Project 08	Running	2

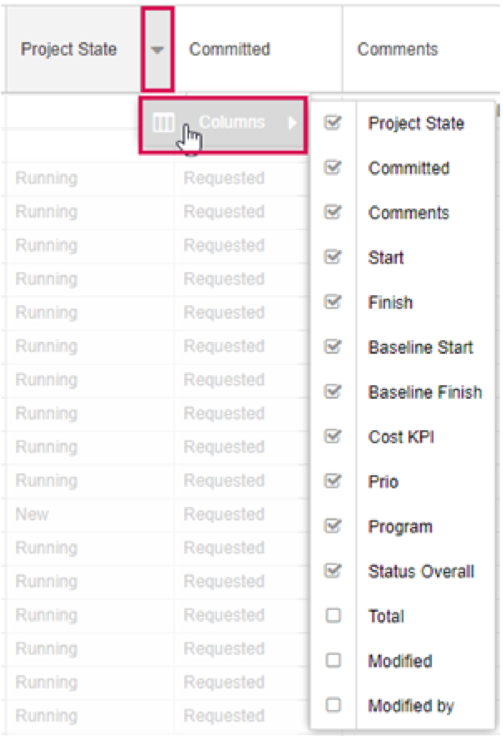
- To remove the sorting, place the cursor in a cell of any column of the sorted table.
- Open the *Sort* drop-down menu and select *Clear Sort.*



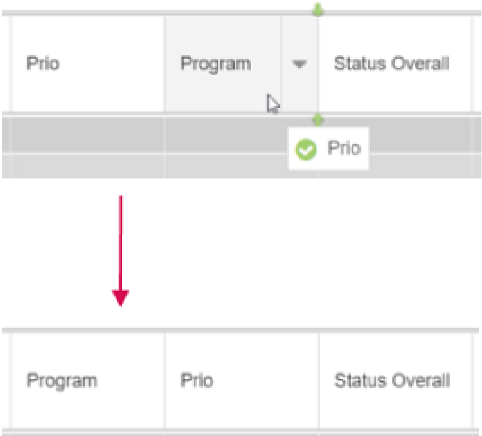
2.2.9 Column filters and rearrangement

You can customize the number and order of columns to be shown in the scenario. The customization will be saved automatically.

- To define which columns are hidden or shown, go to the head cell of a column and click the arrow that appears.
- Go to *Columns* and deselect or select the respective checkboxes.



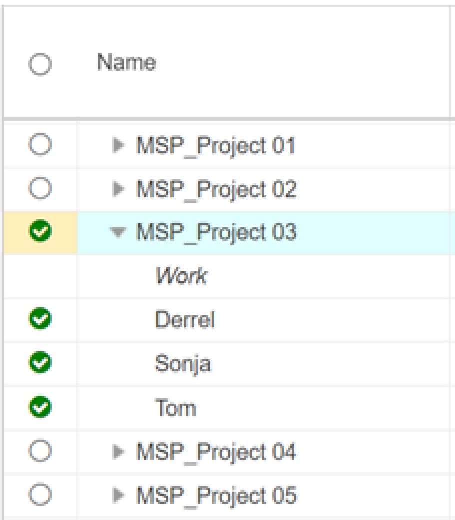
- To change the column order, go to a column header and drag it to the desired place by holding down the mouse button.



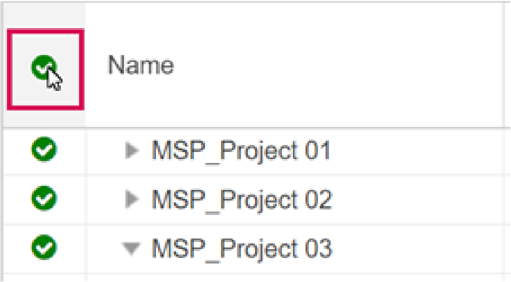
2.2.10 Selection of items for editing

In the project and resource table, individual projects and resources can be selected for editing or updates.

- To select or deselect an item, use the checkboxes in the first column.
  Selecting a group item will select the sub-items automatically.

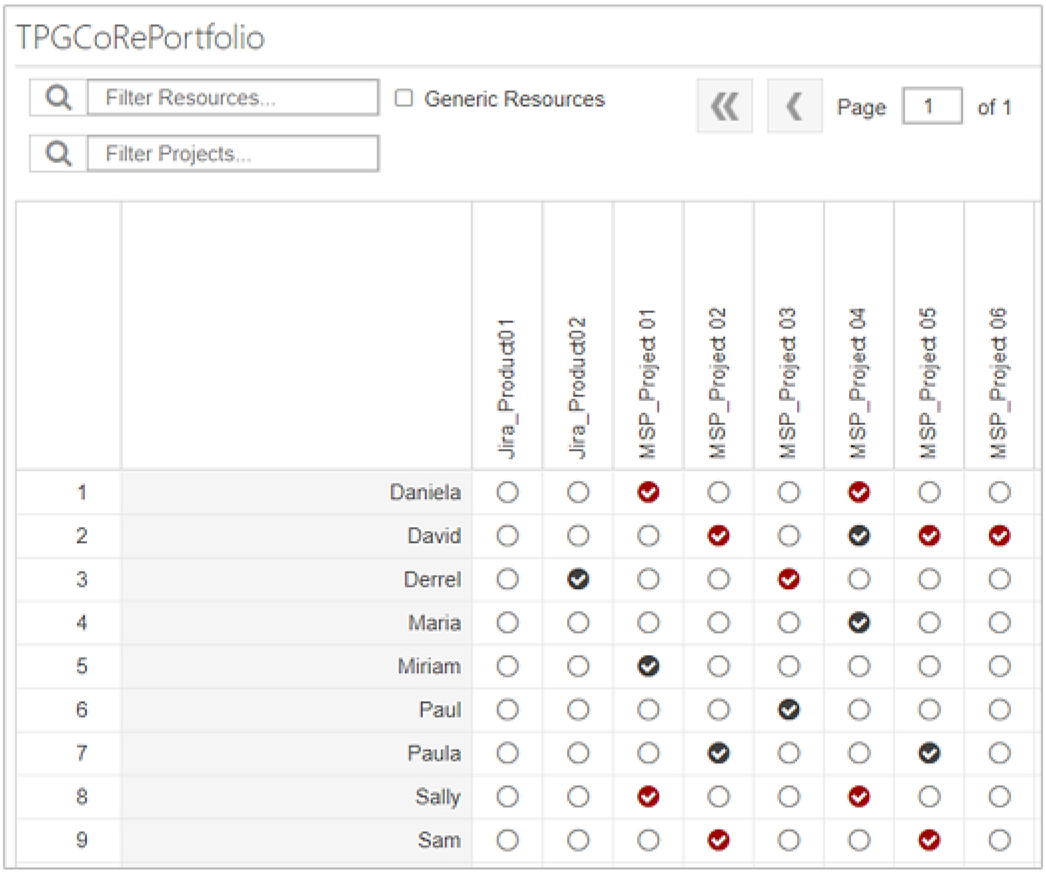


- To select or deselect all items at once, use the checkbox in the column header.


Name
MSP_Project 01
MSP_Project 02
MSP_Project 03

2.3 Matrix

The *Matrix* view shows the assignment of the team resources to the projects. Here, you can make a rough planning by assigning resources to projects before going into detail in the *Scenario* view.



Red background: assignment with time-phased data imported from the source project.

Black background: assignment without time-phased data imported from the source project.

Assignments can be established by selecting the appropriate checkbox(es). Removing the checkmarks deletes the assignments.

➤ When you delete an assignment marked in red, a confirmation / warning prompt is displayed: *You are removing an assignment with time-phased data or custom field values! Would you like to continue?*
When you delete an assignment marked in black, there is no confirmation / warning prompt.

Time-phased project work data saved in the source projects will be reloaded when you update the scenario, the projects or resources (see Loading source data 50).

2.3.1 Matrix filters

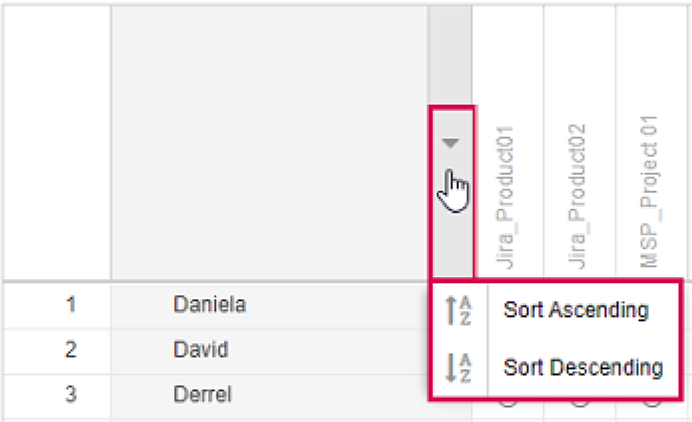
By default, the matrix shows all named resources of the portfolio and 30 projects per page.

- To filter for specific projects or resources, enter their name in the respective filter field (1). The filter will be applied while entering the name.
- To show the generic resources, select *Generic Resources* (2).
- To show more or less projects, change the value in the *Columns per Page* field (3).

2.3.2 Sorting and rearrangement

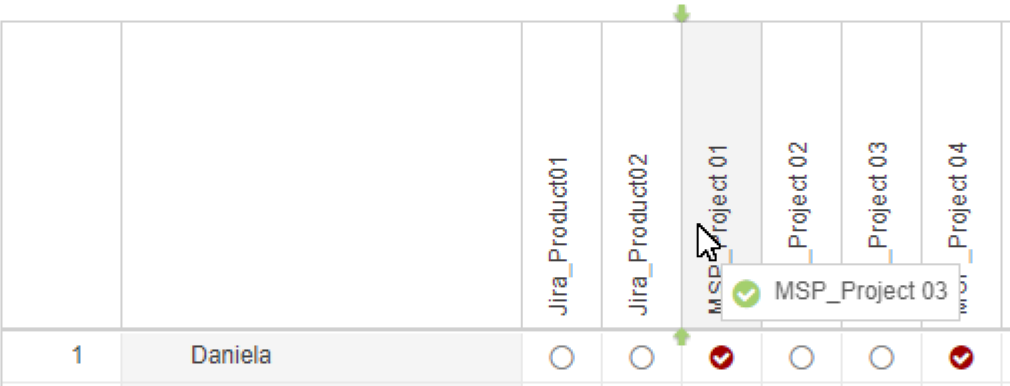
The order of the matrix rows can be switched between ascending and descending.

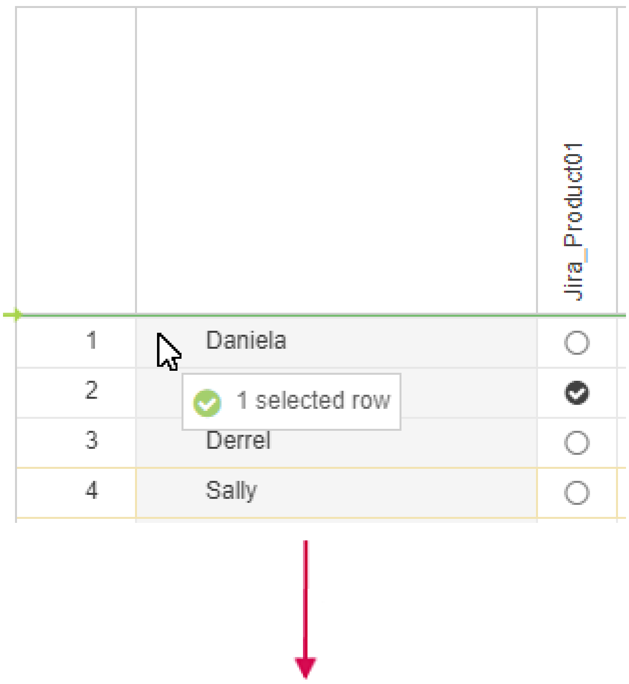
- Go to the field above the name column, click the arrow that appears and select the desired order.

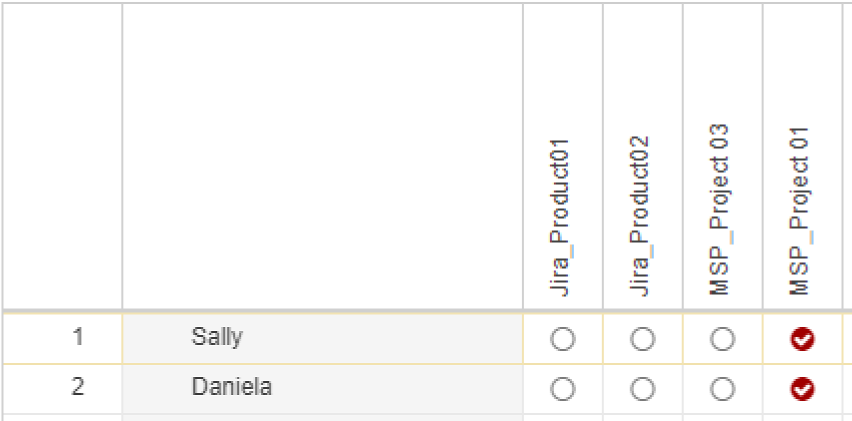


The order of rows and columns can be changed by drag and drop.

- Go to a column header or a row and drag it to the desired place by holding down the mouse button.



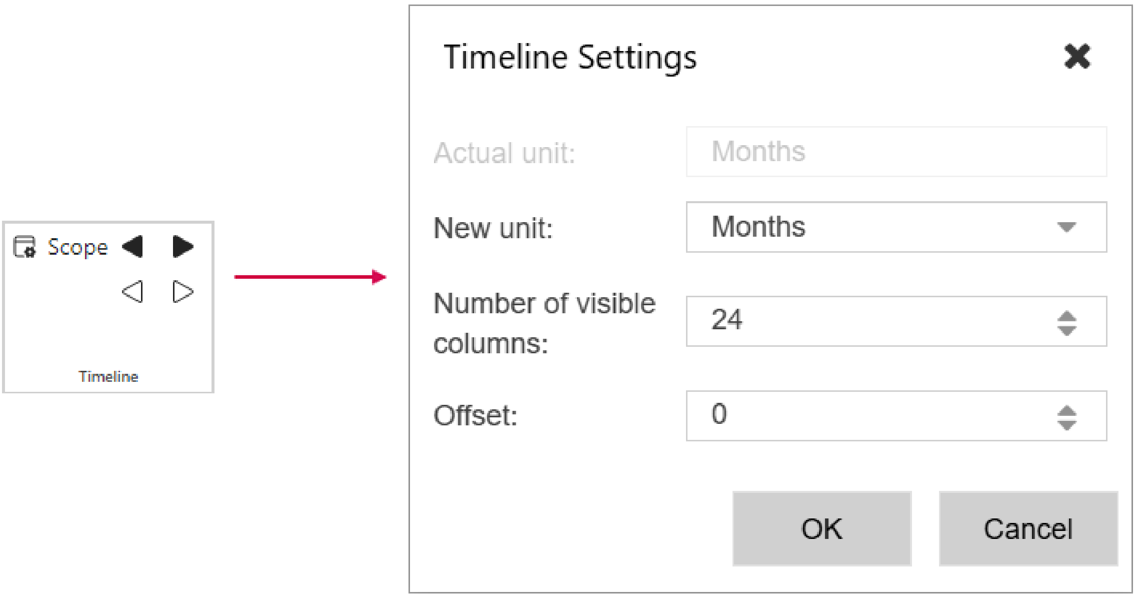




2.4 Timeline

In this Chapter you find all settings around the topic Timeline.

- In the *Timeline* group of the *Scenario* menu bar, click *Scope*.
  That opens the timeline settings.



At New unit 38 you can set the desired unit. Available is *Days*, *Weeks*, *Months*, *Quarters*, *Years.* Values are always stored in hrs/day so that the system always calculates the correct value for each unit.

If you have set the unit other than days, the entered number of hours will spread through the number of working days within that unit.

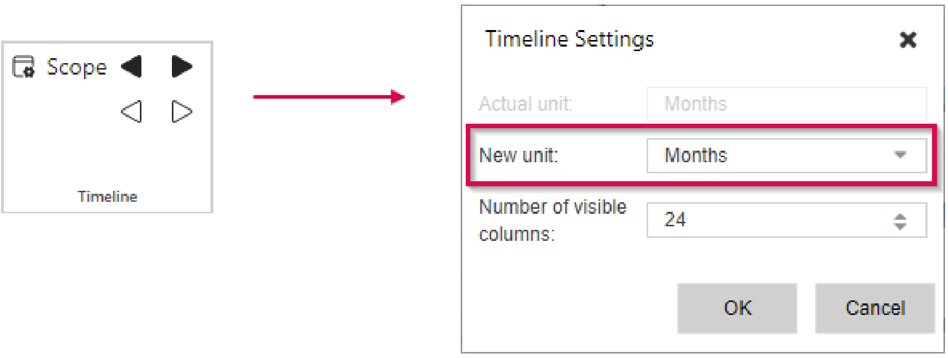
At Number of visible columns 39 you set the number of visible columns which is important if you want to show days the more columns you set the longer the system needs to render the view.

Offset 40 sets the Number of Units Offset from the current date.

2.4.1 Timeline units

By default, the timeline shows years on the main scale and months as planning units on the lower scale, starting with the current month. You can change the planning units to days, weeks, quarters or years.

- In the *Timeline* group of the menu bar, click *Scope*.
- Select the desired planning unit from the drop-down menu and click *OK*.
  The unit of the main scale changes automatically according to the unit of the lower scale. For example, if you set the lower scale unit to *Weeks*, the main scale will automatically change to months including the year.



If the new unit is larger than the current one, the values of time-phased data will be summarized accordingly.
If the new unit is smaller than the current one, the values will be distributed linearly.

If the new unit is larger than the current one, the values of time-phased data will be summarized accordingly. If the new unit is smaller than the current one, the values will be distributed linearly.

The following table shows an example for the entries in the *Absences* row of a resource (October 2022 - March 2023):

	Planning unit: Months	Planning unit: Quarters
Entries	Nov: 8h, Dec: 40h, Jan: 24h	Q4: 48h, Q1: 24h
Switch unit to	Quarters	Months
Outcome	Q4: 48h, Q1: 24h	Oct: 15.75, Nov: 16.5, Dec: 15.75 Jan: 8.12, Feb: 7.38, Mar: 8.49

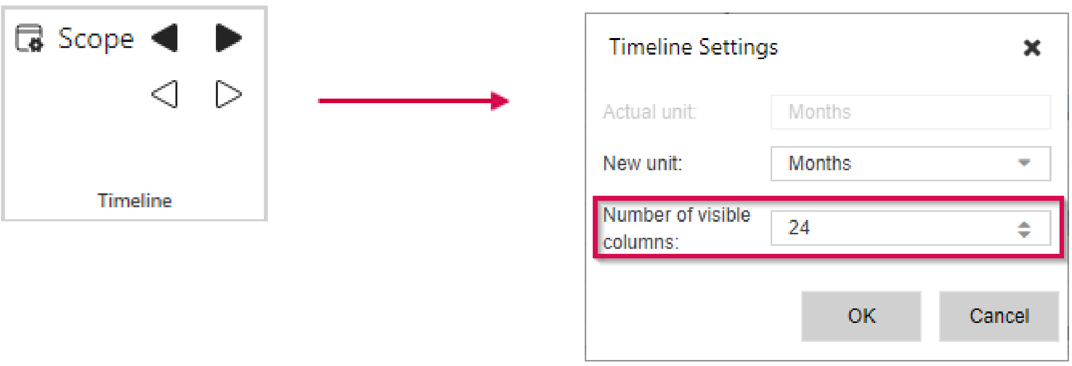
➤ When switching from months to weeks or from weeks to months, the accuracy of your inputs can get skewed. The reason is that weeks often go beyond months. To avoid skewed recalculation results, it is recommended that you choose and stick to a planning unit.

2.4.2 Timeline range

By default, the timeline shows years on the main scale and 24 months as planning units on the lower scale, starting with the current month. You can shift the timeline or change the number of visible planning units with the buttons in the *Timeline* group of the menu bar.

- To shift the timeline start back or forward by one unit on the main scale, click the double arrows.
- To shift the timeline start back or forward by one planning unit, click the single arrows.

- To change the number of planning units to be shown, click *Scope.*
  - Enter the desired number of visible columns and click *OK*.



➤ For changing the units themselves, see Timeline units 38.

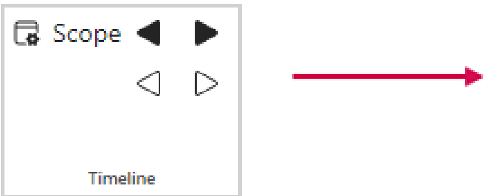
2.4.3 Timeline Start

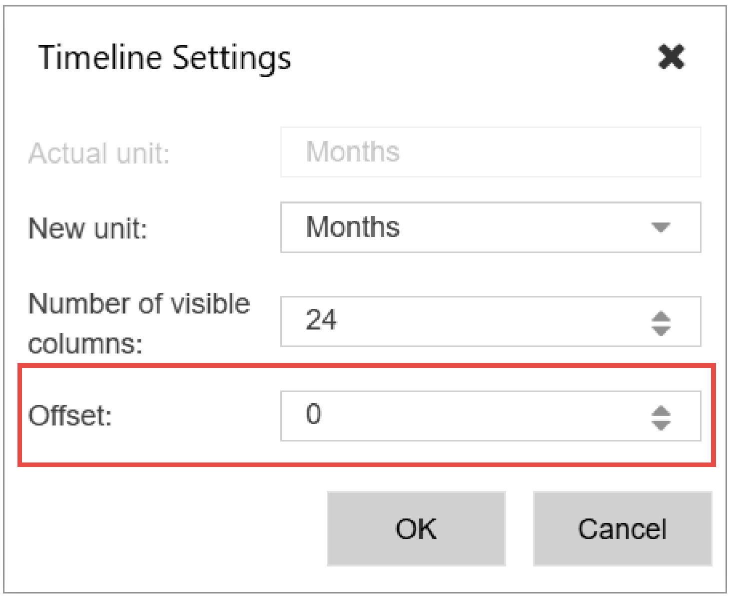
By default, the timeline starts with current unit. For example the timeline Unit is set to Month, and the current month is August then the timeline starts with August.

However, sometimes you want to see the some units before the current one, then you can set a negative Offset to see the number of Units before the current one.

Or you want to start he timeline a few units into the future then you can set a positive Offset, to start the timeline a few units into the future.

- In the *Timeline* group of the menu bar, click *Scope*.
- Select the desired planning offset from the drop-down menu *Offset* and click *OK*.





3 Planning Options

This section gives an overview of planning options, using examples.

It explains how to

- open, close and check in/out 41 a scenario
- create 43, copy 47 or rename 48 a scenario
- enter or delete general comments 49
- load source data 50
- reload 53 the scenario
- edit projects 54, resources 61 and assignments 65

➤ You can create, copy or edit scenarios only if you have permissions for the underlying portfolio. The permissions are granted by the administrator.

Input data are saved automatically.

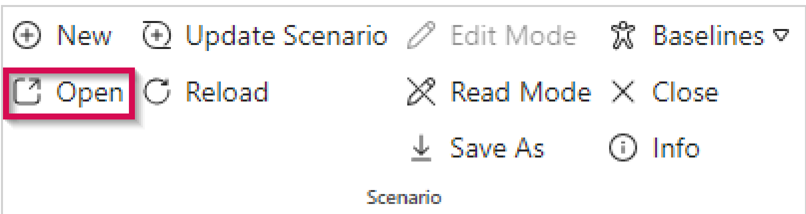
When you click the reload button of the browser, the scenario will be closed and you must reopen it to continue.

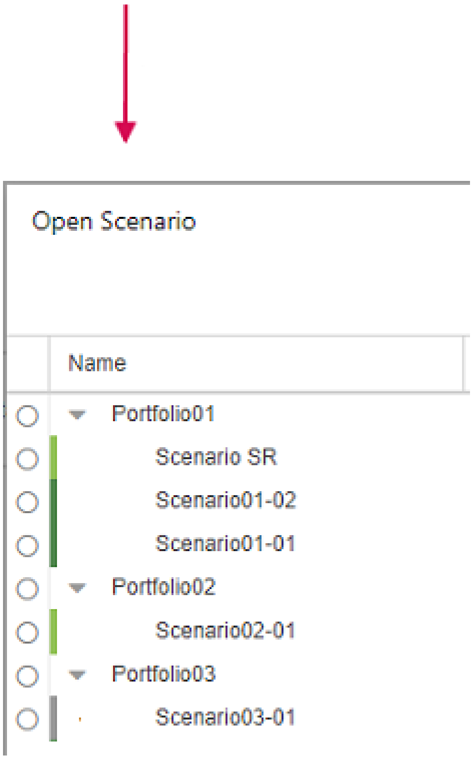
To see the last saved source data of projects and resources, update the scenario.

3.1 Checking in and out

An existing scenario can be opened on the *Scenario* tab.

- To open the list of scenarios, click *Open* in the *Scenario* group of the menu bar.





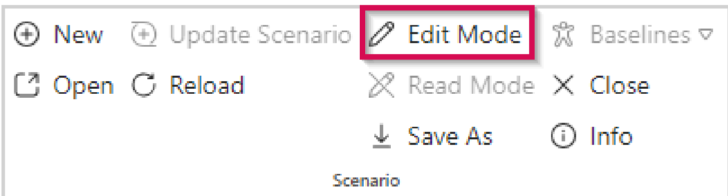
- To open a scenario, double-click its name, or select the name and click *Open* at the bottom right.

In TPG PortfolioManager, a scenario can be edited only by one user at a time. To edit a scenario, it must be checked out by you.

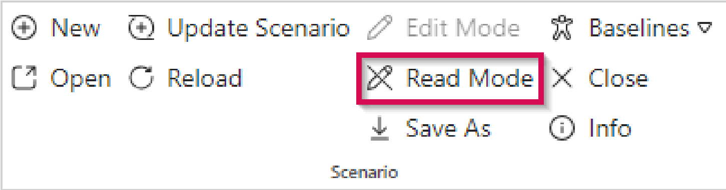
A colored line at the left edge indicates if a scenario is checked in or out:

Gray: Either someone else has set the scenario to the edit mode, i.e. it is checked out. Or you do not have permissions for the underlying portfolio. In both cases, you can open and read the scenario but cannot edit it.

Light green: The scenario is in the read mode, i.e. it is checked in. After opening the scenario, you can check it out by clicking *Edit Mode* in the *Scenario* group of the menu bar.



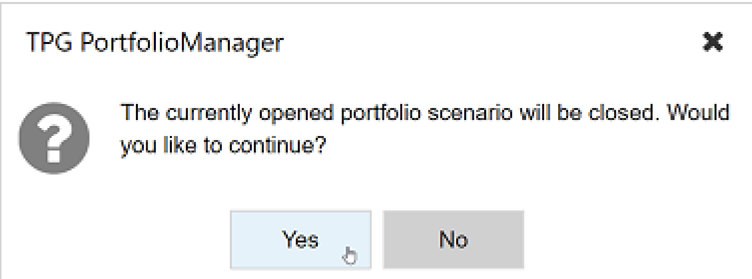
Dark green: The scenario has been checked out by you. After opening the scenario, you can edit it directly.
To enable other users to edit the scenario, check it in by clicking *Read Mode* in the *Scenario* group of the menu bar.



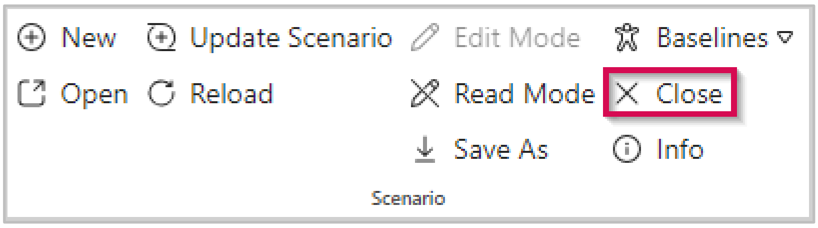
The last saved mode will be kept when you close the scenario.

➤ It is recommended to set baselines 55 before editing a scenario.

If you have opened a scenario and open another one, you will be asked whether the current scenario should be closed:



- To close a scenario without opening another one, click *Close* in the *Scenario* group of the menu bar.



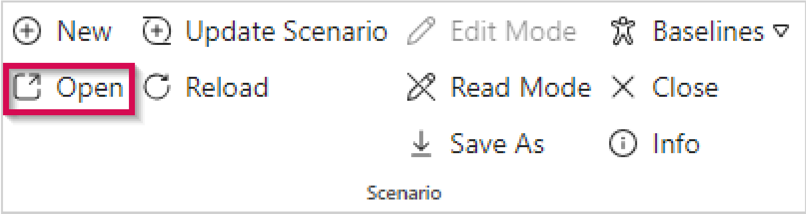
3.2 Creating a scenario

➤ Scenarios are based on portfolios created by the administrator. You can create and/or edit scenarios only for portfolios for which you have permissions. The permissions are granted by the administrator.

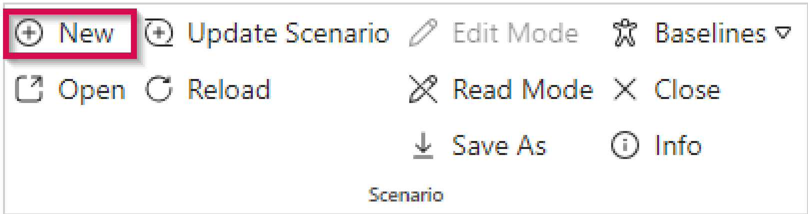
When a portfolio is created, a scenario named *New Scenario* is automatically created. For changing the scenario name, see Renaming a scenario 48.

Further scenarios can be created from an open scenario.

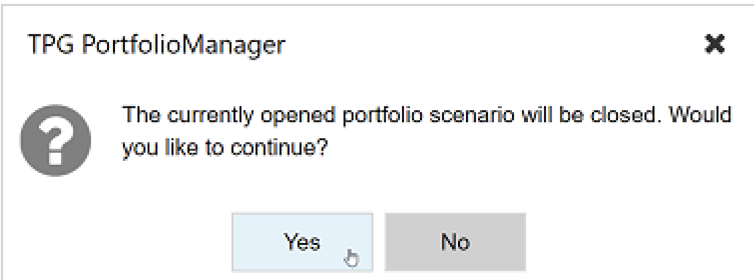
- If you have not opened a scenario of your portfolio, click *Open* in the *Scenario* group of the menu bar.



  - Open a scenario of your portfolio.
    If there are already several scenarios based on the same portfolio, it does not matter which of these you open. The scenario you create will be based on the actual configuration of the portfolio in the administration tool.
- Click *New* on the menu bar.



- In the query that appears, click *Yes*.



- Enter a name for the scenario and click *OK*.
  The currency is set by the administrator for the portfolio and cannot be changed here.

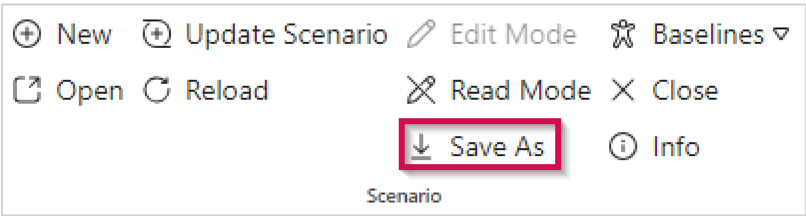

New Scenario
Portfolio Name:
Portfolio01
Scenario Name:
Scenario01-01
Currency:
Euro
OK
Cancel

3.3 Copying a scenario

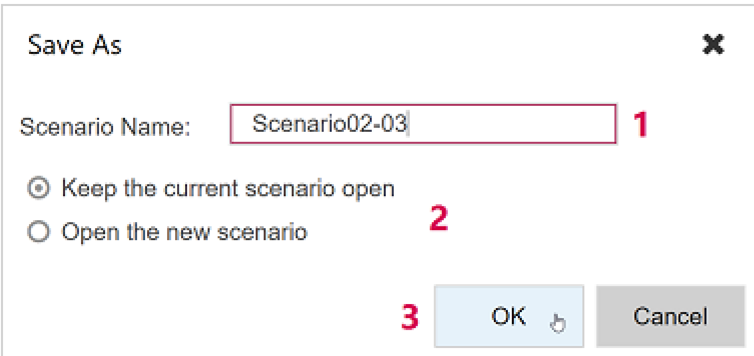
To keep a specific state of data, you can save a copy of a scenario.

➤ You can copy scenarios only if you have permissions for the underlying portfolio. The permissions are granted by the administrator.

- Open the scenario you want to copy.
  It does not matter if the scenario is in the read mode or the edit mode.
- Click *Save As* in the *Scenario* group of the menu bar.



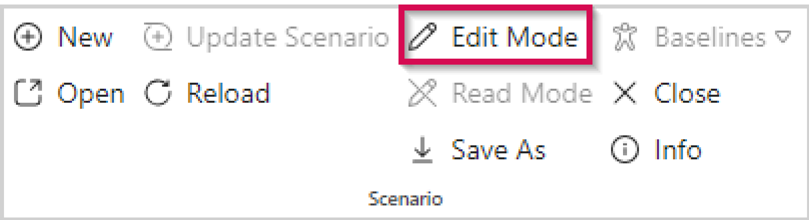
- Enter a name for the new scenario (1).
- Choose if you want to keep the current scenario open or open the new one (2).
- Click *OK* (3).



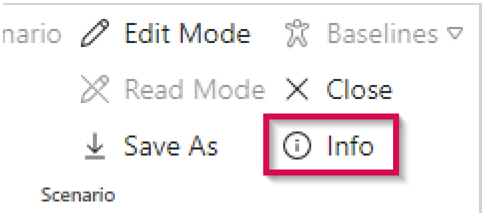
3.4 Renaming a scenario

➤ You can change a scenario name only if you can edit the scenario.

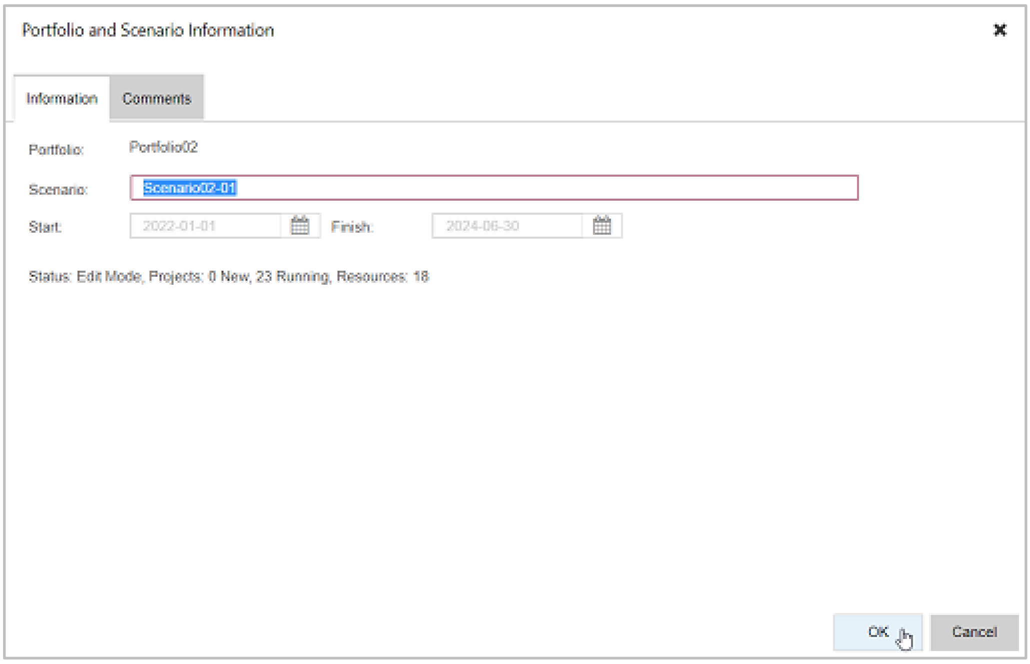
- Open the scenario you want to rename.
- If the scenario is in the read mode, click *Edit Mode* in the *Scenario* group of the menu bar.



- Click *Info* on the menu bar.



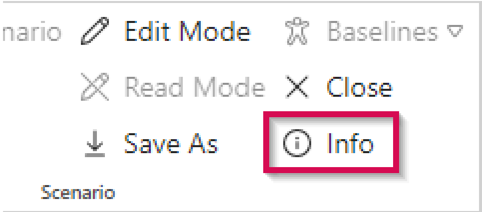
- Enter a new name for the scenario and click *OK*.



3.5 Entering/Deleting general comments

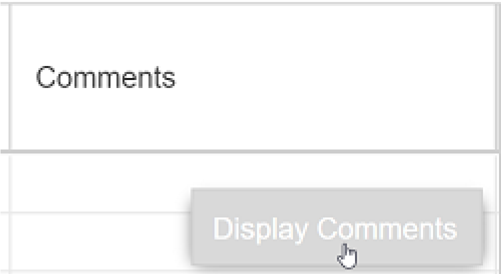
Entering general comments can be useful to track changes made in the scenario or to note points to be considered.

- Click *Info* in the *Scenario* group of the menu bar and open the *Comments* tab.

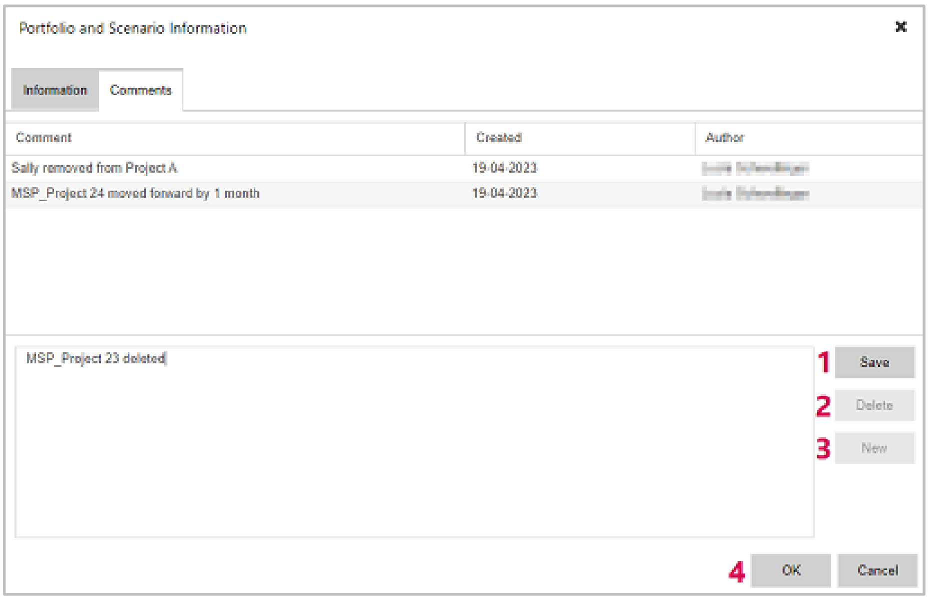


Or

- Go to the project or resource table in the *Scenario* view.
  - Right-click in the scenario row of the *Comments* column and click *Display Comments*.



- Enter your comment in the lower part of the window and click *Save* (1).
  The comment will be displayed in the upper part of the window.
  - To save the comment and close the window at the same time, click *OK* (4) instead of *Save*.
- To add further comments, clear the writing pane by clicking *New* (3).
- To delete a comment, select it in the upper part of the window and click *Delete* (2).



➤ You can delete a comment only if you are the author. Comments entered by other users are read-only.

It is not possible to edit comments. If you want to make changes, delete the comment and enter a new one.

3.6 Loading source data

Sometimes, you may want to restore your scenario to source data, or you need to update data because of changes in the underlying portfolio or projects.

To complete or update the scenario from source data, there are the following options:

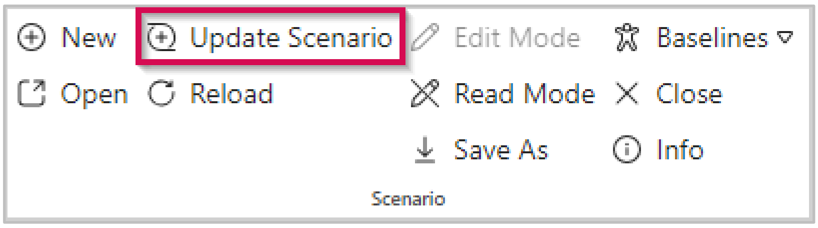
If you want to ...	Use function ...
Load the actual source data of all portfolio projects and resources into the scenario	*Update Scenario* 51
Add portfolio projects that are not in the scenario	*Import Projects* 51
Add portfolio resources that are not in the scenario	*Import Resources* 51
Update specific scenario projects	*Update Projects* 52
Update specific scenario resources	*Update Resources* 53

➤ If the value in the *Committed* column of a project is set to *Committed*, work data of this project will be updated from the *Commitments* rows in TPG TeamManager. If TPG TeamManager is not used, the *Committed* column should be hidden.

3.6.1 Update Scenario

Updates all projects and resources of the scenario. Projects and resources that are new in the portfolio or have been deleted from the scenario will be added.

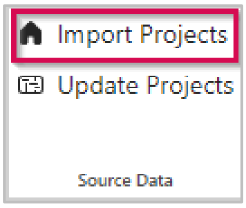
- Click *Update Scenario* in the *Scenario* group of the menu bar.



3.6.2 Import Projects

Adds projects of the portfolio that are not yet in the scenario or have been deleted from the scenario. Existing scenario projects will not be updated. Work data of scenario resources that are assigned to the new projects will be updated. If the new projects have resources assigned that are not yet in the scenario, the resources will be added.

- Open the *Projects* tab and click *Import Projects* in the *Source Data* group of the menu bar.

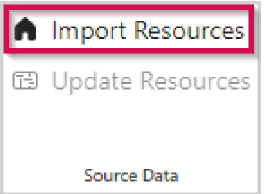


3.6.3 Import Resources

Adds resources of the portfolio that are not yet in the scenario or have been deleted from the scenario.

Existing scenario resources will not be updated. If the new resources are assigned to projects that are not yet in the scenario, the projects will be added.

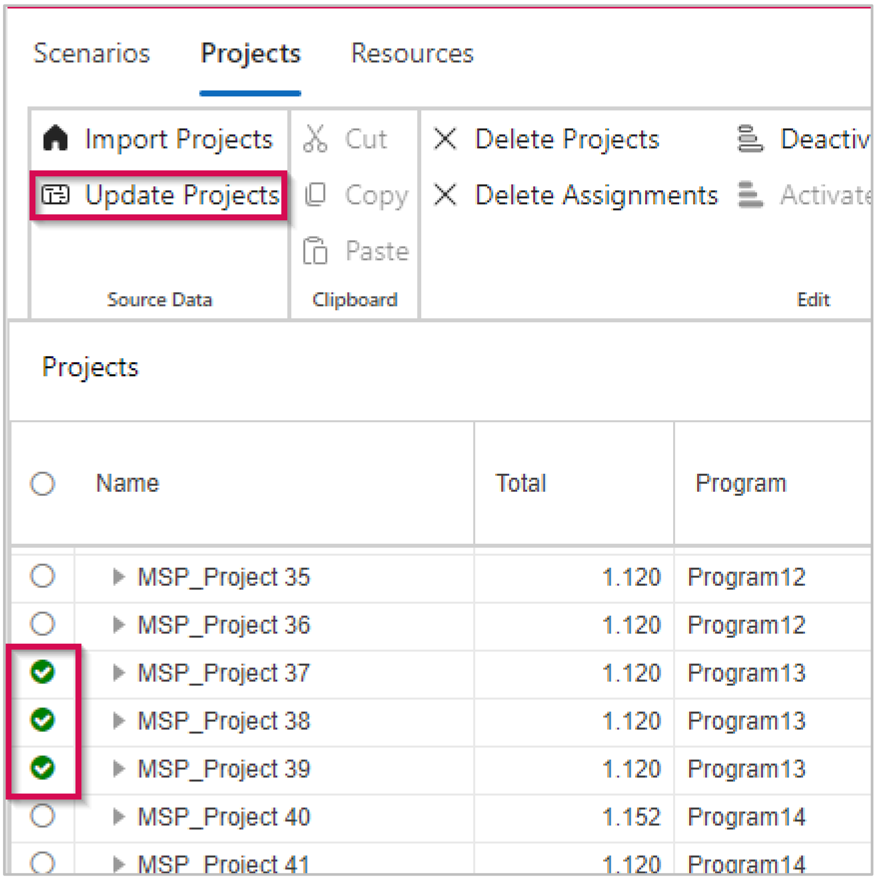
- Open the *Resources* tab and click *Import Resources* in the *Source Data* group of the menu bar.



3.6.4 Update Projects

Updates the selected scenario projects including project assignments and assigned work values of the resources.

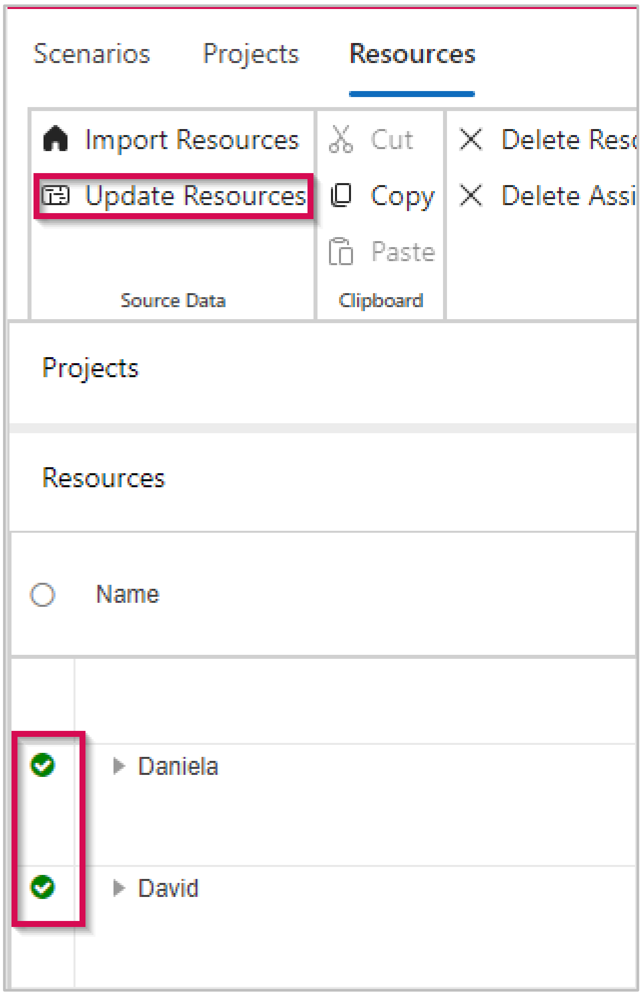
- Select the desired project(s) in the project table and click *Update Projects* in the *Source Data* group of the menu bar.



3.6.5 Update Resources

Updates the capacity, name and other properties of selected scenario resources. Assignments and work data that have been deleted or edited in the scenario will not be restored.

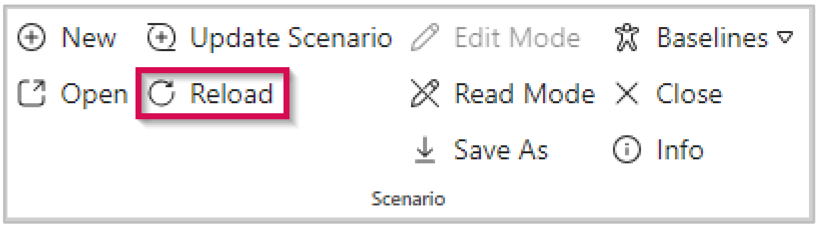
- Select the desired resource(s) in the resource table and click *Update Resources* in the *Source Data* group of the menu bar.



3.7 Reloading the scenario

This loads the last saved scenario data without accessing the source data. You will need this function only if someone might be editing the scenario while you are viewing it in read mode.

- Click *Reload* in the *Scenario* group of the menu bar.



3.8 Editing projects

This section describes actions affecting a project as a whole.

It explains how to

- change 54 the project state or general project data
- set baselines 55 (recommended before editing time related data)
- move 57 projects on the timeline
- restore 58 projects to the baseline
- deactivate and activate 59 projects
- delete 61 projects from the scenario

3.8.1 Changing the project state or general project data

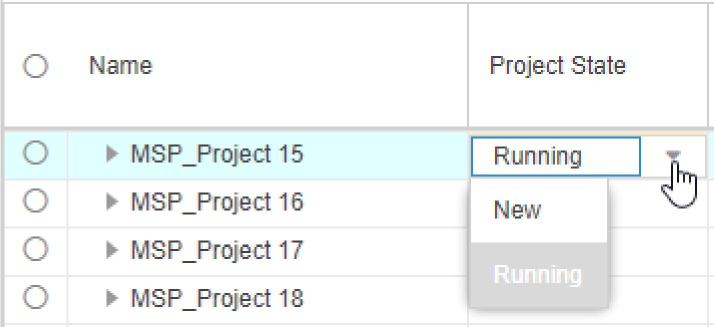
The project state and other project properties can be edited. When projects from TPG CoRePlanner are loaded into the scenario, the project state is the value specified in TPG CoRePlanner. For projects planned in some other tool, the default project state is *Running.* The project bar of running projects is dark blue.

You can change the project state according to the start date or use the function for some other differentiation.

Other information about a project, e.g. priority or KPIs, is shown in custom fields depending on the settings of your organization.

➤ Project properties can be changed only in the project table. In the resource table, the *Project State* column will show the values but the cells are read-only.
When you update the project, the changes you made in custom fields will be overwritten by the source data. The project state will be overwritten only for projects planned in TPG CoRePlanner.

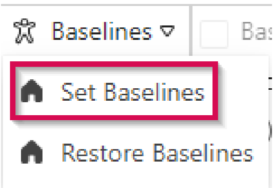
- To edit the project state or some other project property, double-click in the respective cell.
- Enter or select the desired value.
  When the *Project State* value is set to *New*, the project bar will turn light blue.



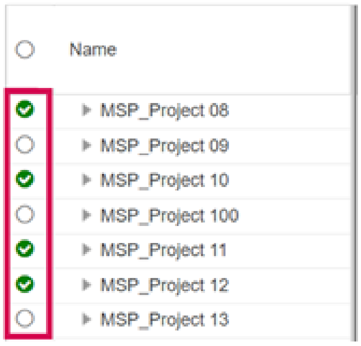
3.8.2 Setting baselines

Before moving projects on the timeline to simulate different planning options, a baseline should be saved. Per project one baseline can be set. You can set baselines for all projects of the scenario at once or for specific projects.

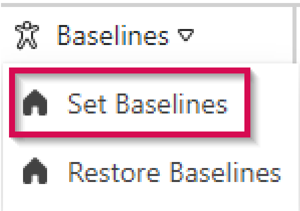
- To set baselines for all projects, open the *Scenario* tab.
  - Click *Baselines* in the *Scenario* group of the menu bar.
  - Select *Set Baseline*.



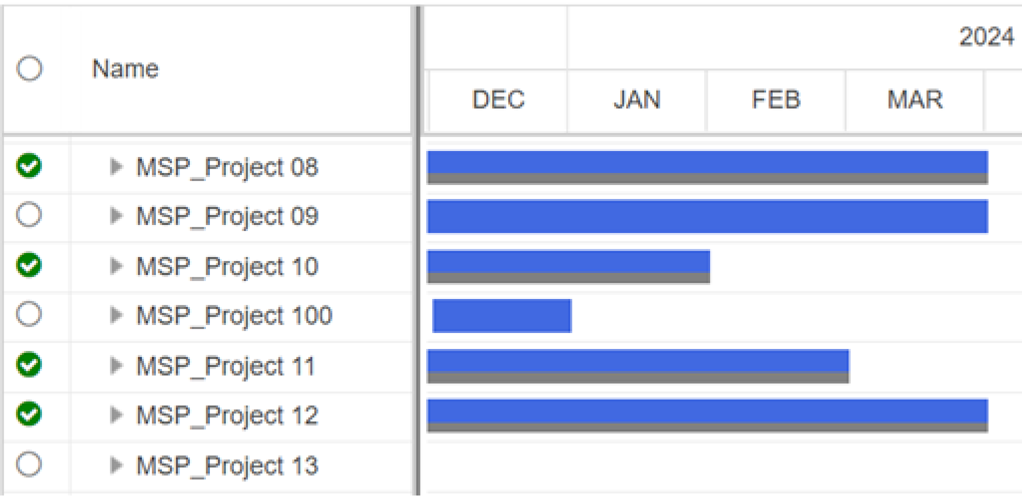
- To set baselines for specific projects, select the desired project(s).



- Click *Baselines* in the *Edit* group of the *Projects* tab.
- Select *Set Baseline*.



Baselines are shown in gray in the bar chart:

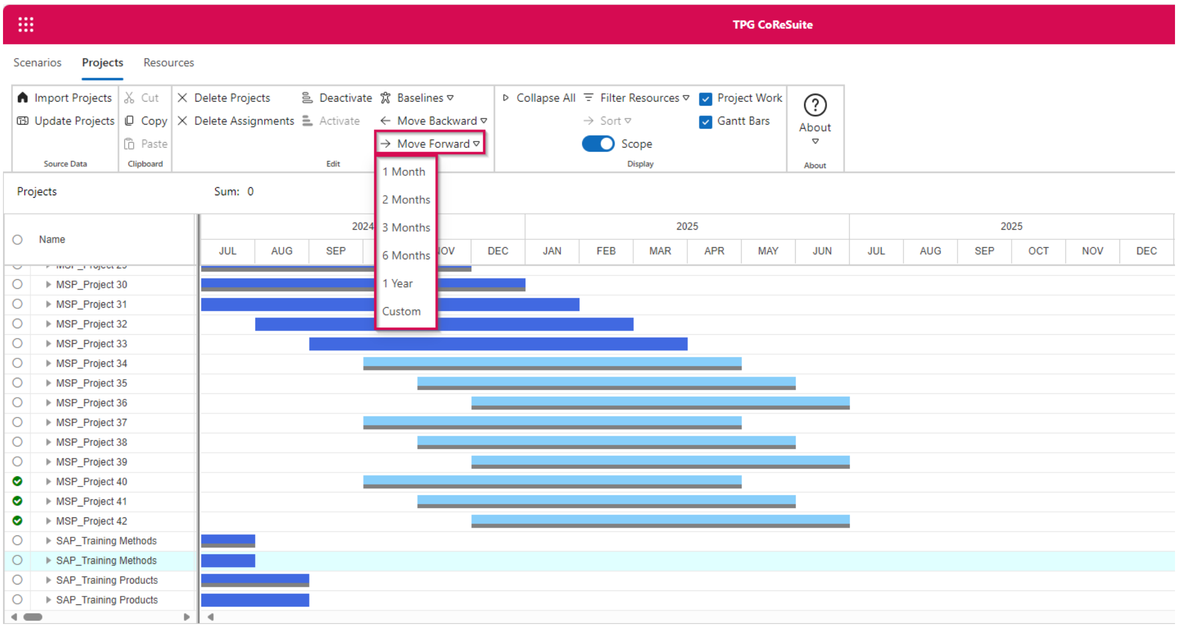


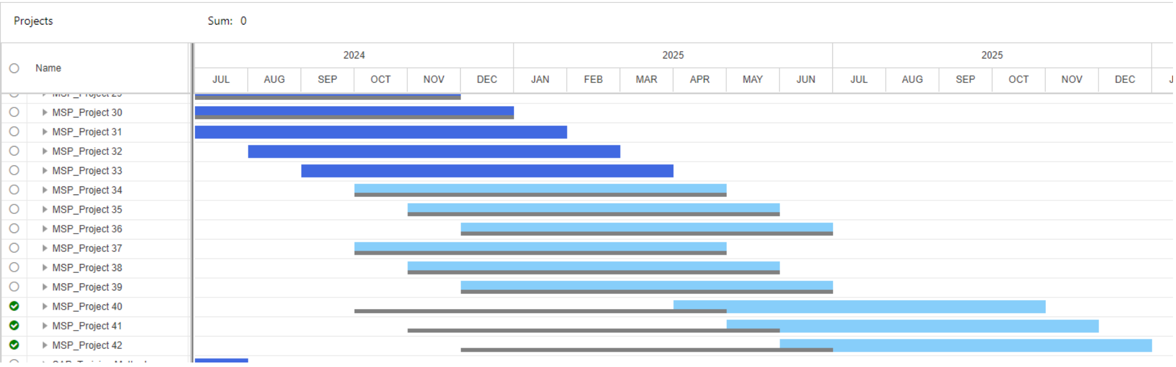
When the baseline is set, the baseline start date and the baseline finish date are shown in the corresponding columns in the left part of the table.

3.8.3 Moving projects

To optimize the resource utilization, projects can be moved on the timeline.

- Make sure baselines have been set for the projects you want to move.
  This will make it easier to restore the original plan if necessary.
- Select the projects you want to move (2).
  In the example below, the projects are grouped by program, and two projects of Program06 are selected. If you select the checkbox of the group item, all corresponding sub-items will be selected.
- Click the arrow below *Move* in the *Edit* group of the *Projects* tab (1). Go to the desired shift direction in the drop-down menu and select the period by which the project(s) should be moved. In this example, the selected projects will be moved forward by half a year.



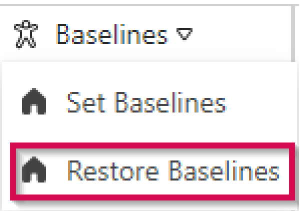


➤ In the same way, you can move resource assignments 66 on the timeline.

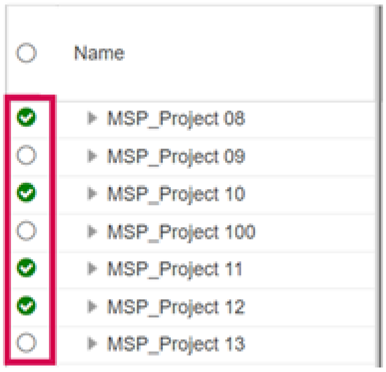
3.8.4 Restoring projects to baseline

You can restore all projects of the scenario to the baseline at once or restore only specific projects.

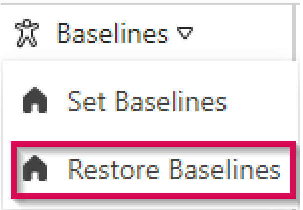
- To restore all projects to the baseline, open the *Scenario* tab.
  - Click *Baselines* in the *Scenario* group of the menu bar.
  - Select *Restore Baseline*.



- To restore only specific projects, select them in the project table.



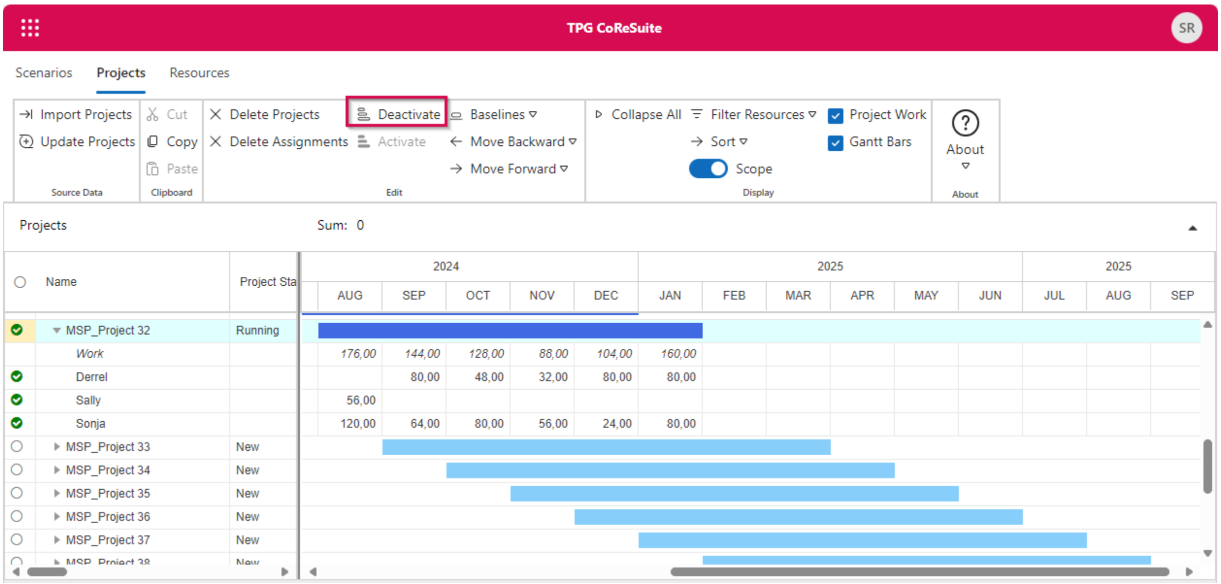
- Click *Baselines* in the *Edit* group of the *Projects* tab.
- Select *Restore Baseline*.

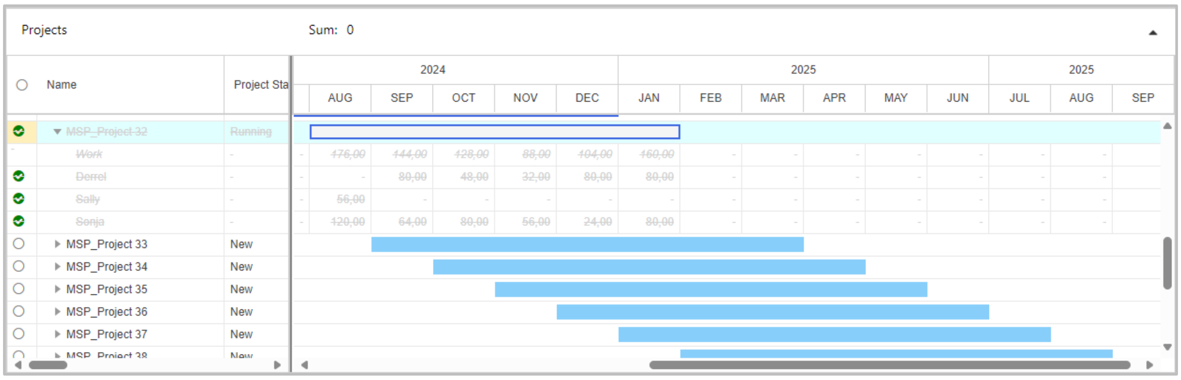


3.8.5 Deactivating/Activating projects

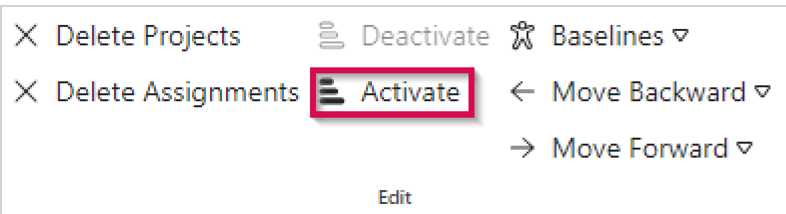
To avoid overloads, projects can be deactivated. The work values of inactive projects are no longer transferred to the resource table. Projects can be reactivated at any time.

- To deactivate a project, select it in the project table (2) and click *Deactivate* in the *Edit* group of the *Projects* tab (1).
  The Gantt bar will change to a frame, text and work values will be crossed out and grayed out.



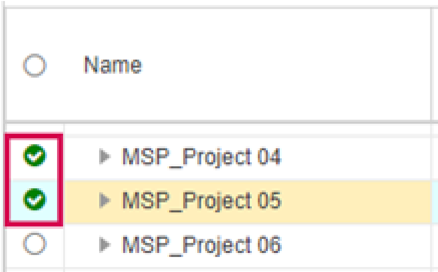


- To reactivate a project, select it in the project table and click *Activate* in the *Edit* group of the *Projects* tab.

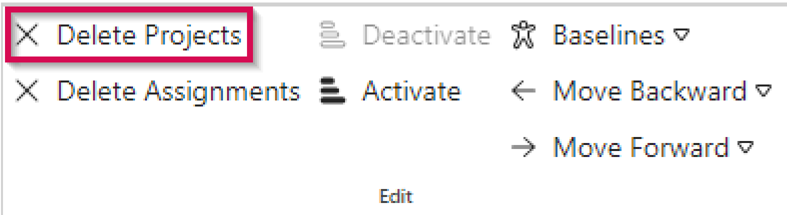


3.8.6 Deleting projects

- To delete projects from the scenario, select the desired project(s) in the project table.



- Click *Delete Projects* in the *Edit* group of the *Projects* tab.



➤ Deleted projects can be reloaded with the *Import Projects* 51 function. This will restore all projects that have been deleted from the scenario and add projects that are new in the portfolio. It is not possible to restore deleted projects individually.

3.9 Editing resources

This section describes actions affecting a resource as a whole, their capacity or other general information.

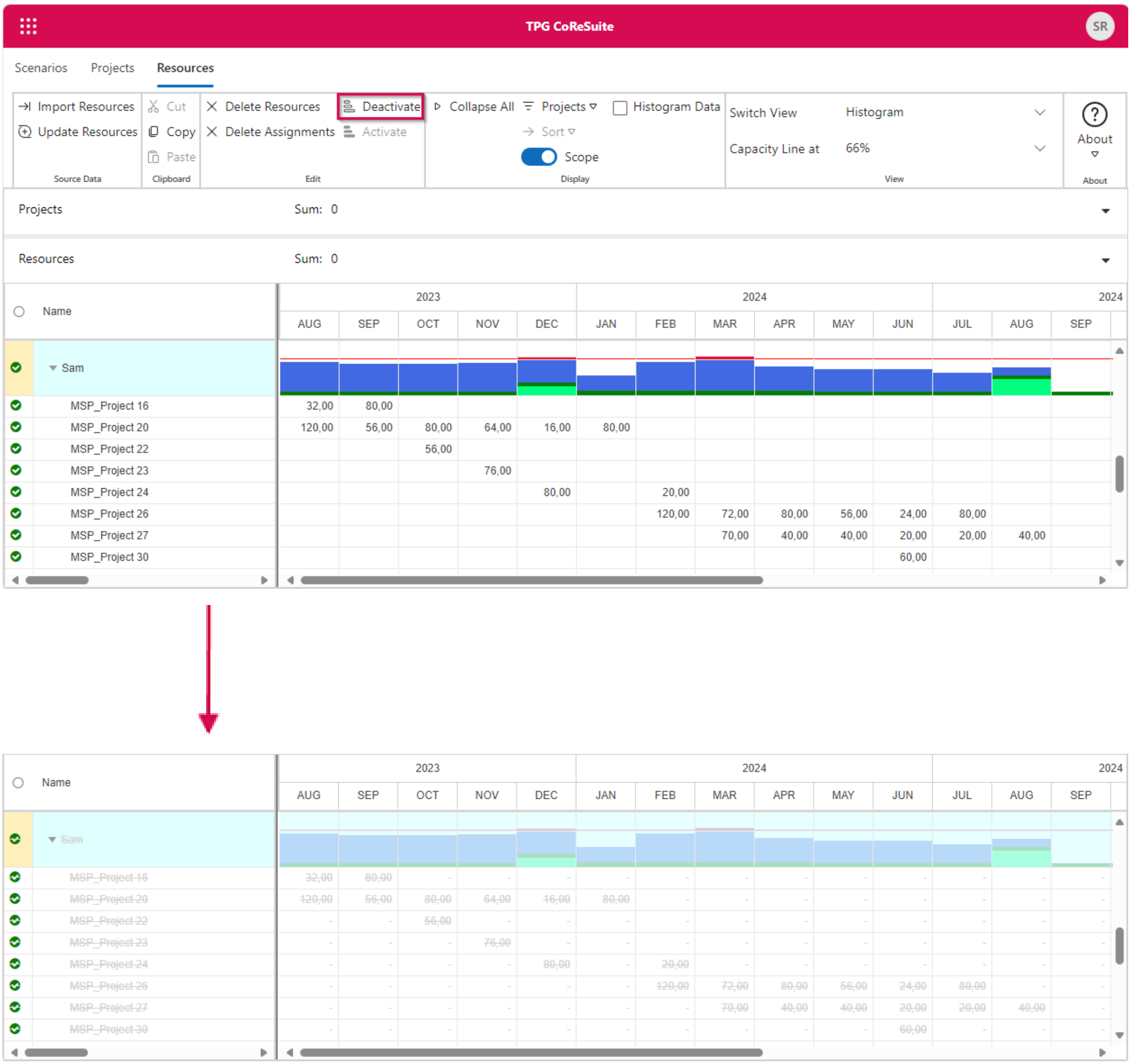
It explains how to

- deactivate and activate 62 resources
- delete 63 resources from the scenario
- edit 64 capacities or general resource data

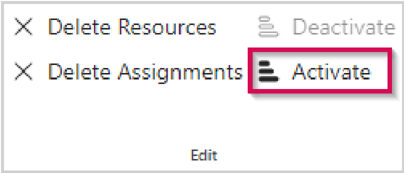
3.9.1 Deactivating/Activating resources

You can deactivate individual resources of a project. The planned work of inactive resources is no longer included in the calculation. Resources can be reactivated at any time.

- To deactivate a resource, select them in the resource table (2) and click *Deactivate* in the *Edit* group of the *Resources* tab (1).
  The resource and their work values will be grayed out, the name and text data are crossed out.



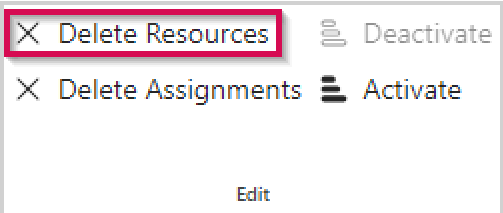
- To reactivate a resource, select them in the resource table and click *Activate* in the *Edit* group of the *Resources* tab.



3.9.2 Deleting resources

- To delete a resource from the scenario, select them in the resource table.

- Click *Delete Resources* in the *Edit* group of the *Resources* tab.



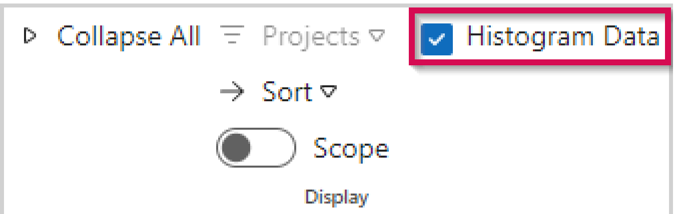
➤ Deleted resources can be reloaded with the *Import Resources* 51 function. This will restore all resources that have been deleted from the scenario and add resources that are new in the portfolio. It is not possible to restore deleted resources individually.

3.9.3 Editing capacities or general resource data

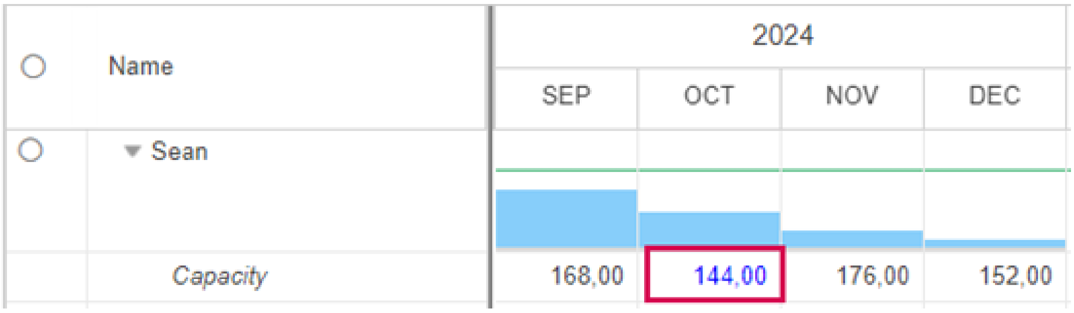
Resource capacities and other resource properties can be edited. The capacity of personal resources must be greater than or equal zero. The capacity of generic resources is zero by default and can be changed to a positive or negative value.
Other information about a resource, e.g. skills or department affiliation, is shown in custom fields in the left part of the table.

➤ When you update the resource, the changes you made will be overwritten by the source data.

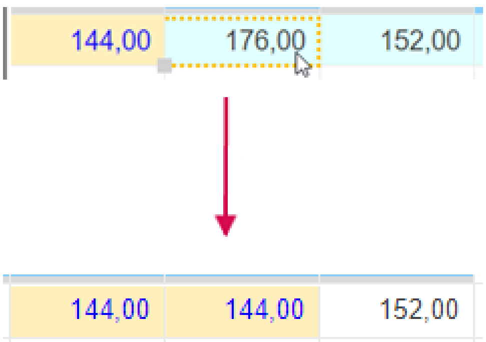
- Expand the field of a resource in the resource table.
- To change information in the left part of the table, double-click in the cell and enter or select the desired value.
- If you want to change the capacity, select *Histogram Data* in the *Show* group of the *Resources* tab.



- Edit the value in the desired time phase of the *Capacity* row.
  You can enter time-phased data after a single or double click in the cell.
  Changed capacity values are shown in blue.



- To copy a value per drag and drop, enter the value in the first cell and drag the bottom right corner of the cell to the end of the period.



3.10 Editing assignments

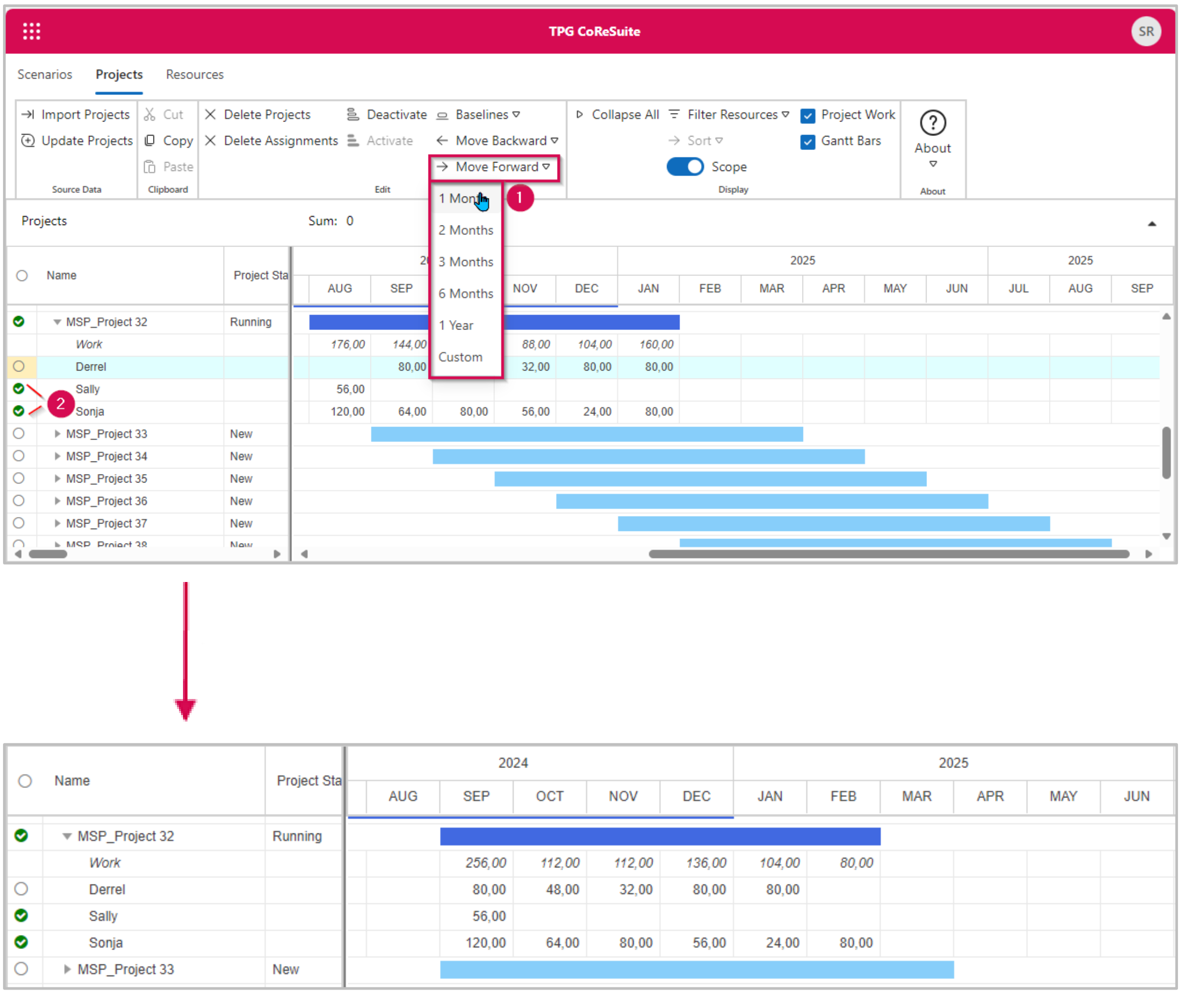
This section describes actions affecting assignments of resources to specific projects or time-phased work data.
It explains how to

- move 66 assignments on the timeline
- delete 67 assignments
- add 68 assignments
- edit work data 69
- show committed work data 70

3.10.1 Moving assignments

To optimize the resource utilization, assignments can be moved on the timeline in the same way as projects.

- Go to a project in the project table and select the resources whose assignment(s) you want to move (2).
  In the example below, two resources of MSP_Project 18 have been selected.
- Click the arrow below *Move* in the *Edit* group of the menu bar (1). Go to the desired shift direction in the drop-down menu and select the period by which the assignment(s) should be moved.
  In this example, the selected resources will be moved forward by one month. Due to the move of _Gen Training, the project will be prolonged by one month.

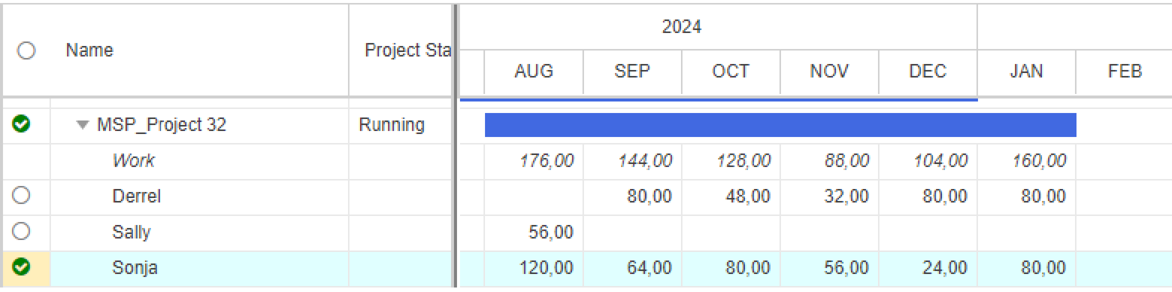


3.10.2 Deleting assignments

There are three options to delete an assignment of a resource to a project:

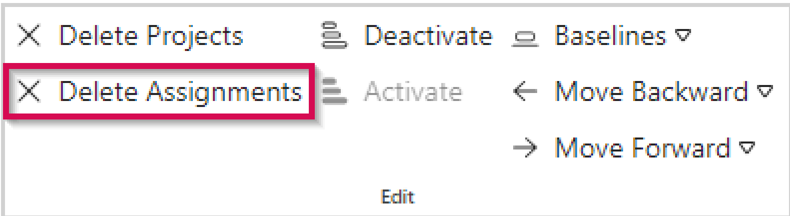
In the project table

- Go to the desired project and select the resource(s) whose assignment you want to delete.



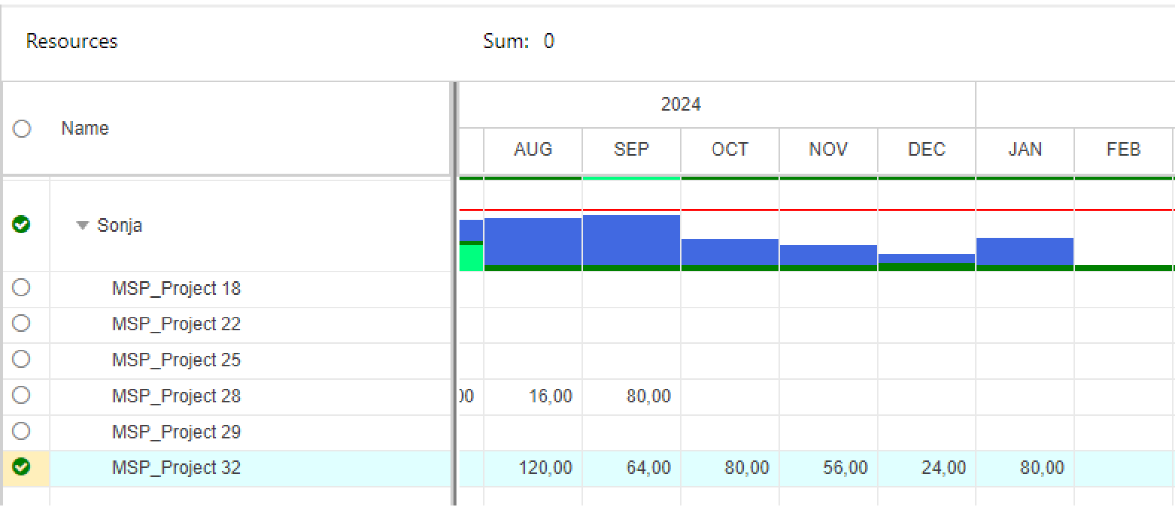
Name	Project Sta	AUG	SEP	OCT	NOV	DEC	JAN	FEB
		2024						
MSP_Project 32	Running							
Work		*176,00*	*144,00*	*128,00*	*88,00*	*104,00*	*160,00*	
Derrel			80,00	48,00	32,00	80,00	80,00	
Sally		56,00						
Sonja		120,00	64,00	80,00	56,00	24,00	80,00	

- Click *Delete Assignments* in the *Edit* group of the *Projects* tab.



In the resource table

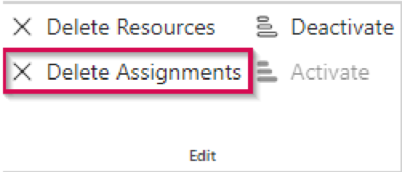
- Go to the desired resource and select the project(s) of which you want to delete the assignment.



Resources Sum: 0

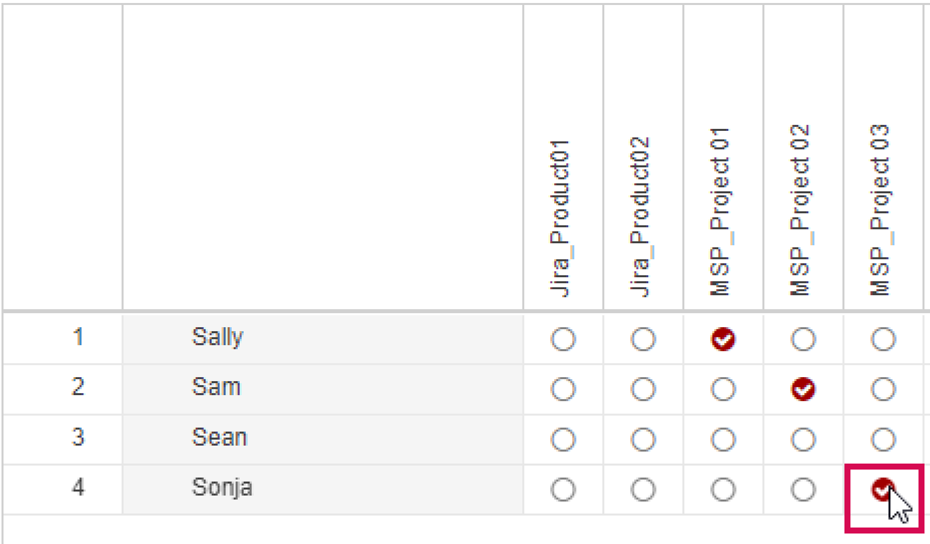
Name		AUG	SEP	OCT	NOV	DEC	JAN	FEB
		2024						
Sonja								
MSP_Project 18								
MSP_Project 22								
MSP_Project 25								
MSP_Project 28	)0	16,00	80,00					
MSP_Project 29								
MSP_Project 32		120,00	64,00	80,00	56,00	24,00	80,00	

- Click *Delete Assignments* in the *Edit* group of the *Resources* tab.



In the *Matrix* view

- Deselect the checkbox of the assignment(s) you want to delete.

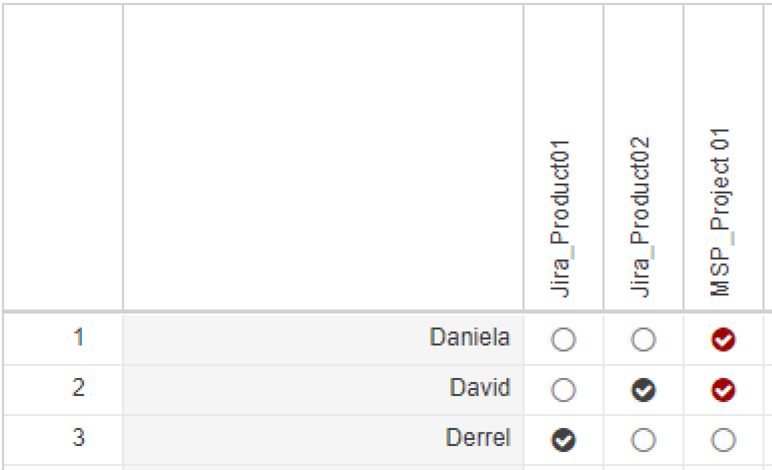


➤ Assignments and work values that are stored in the source projects but have been deleted from the scenario can be reloaded with the *Update Projects* function. 52 This will reload all assignments of the selected project. It is not possible to restore assignments individually.

3.10.3 Adding assignments

➤ If you assign a resource to a project and then update the project, the assignment will be deleted.
Updating the resource will not affect the assignment.

- To assign a resource to a project, open the *Matrix* view and select the appropriate checkbox. The background of the checkmark will turn red when time-phased data are entered for the assignment.



3.10.4 Editing work data

➤ You can enter time-phased data after a single or double click in a cell. Values can also be entered with copy and paste from the clipboard or by drag and drop.
If you enter assignment data in a time phase outside the planned time frame of the project, the project duration will be extended.

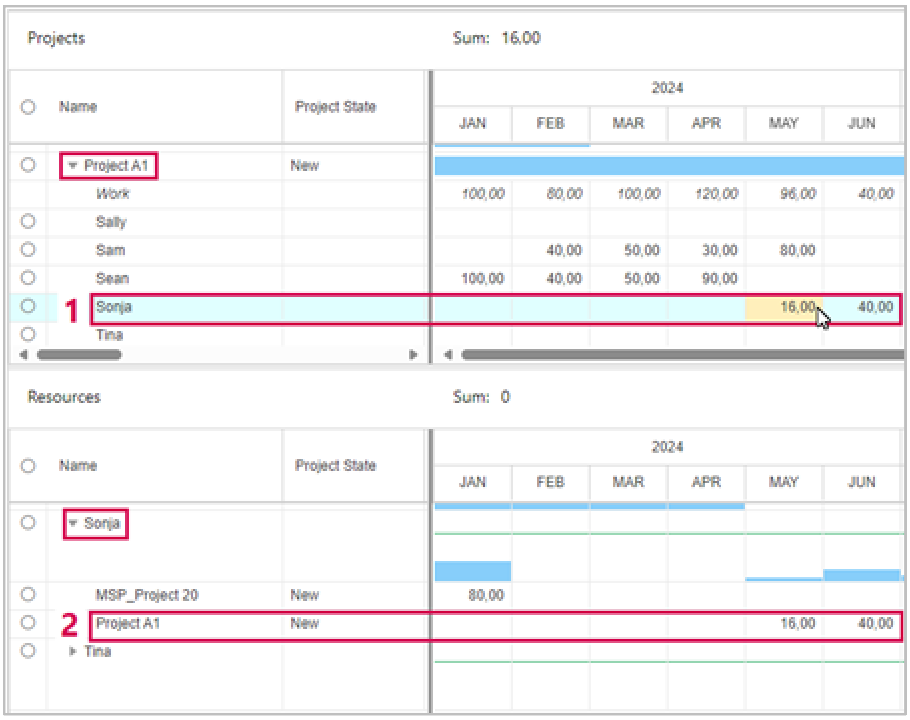
Assignment data can be edited in the project table or the resource table.

- In the project table, expand the project and go to the row of the desired resource (1).

Or

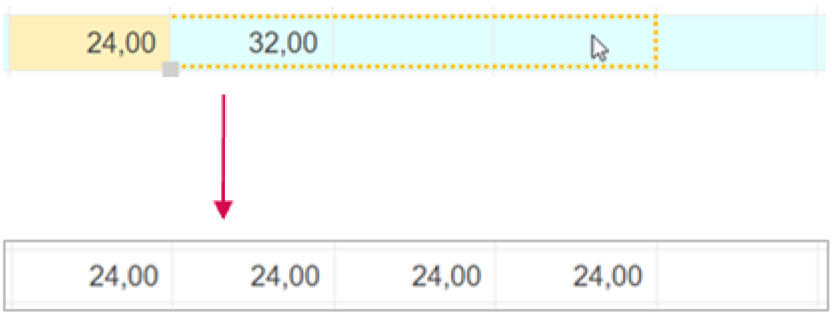
- In the resource table, expand the resource and go to the row of the desired project (2).

- Enter the number of work hours you want to assign in a specific time phase or delete the value. Data edited in the project table will automatically be transferred to the resource table and vice versa.



Copying a value to the neighbouring cells by drag and drop works both horizontally and vertically.

- Enter the value in the first cell.
- Drag the bottom right corner of the cell vertically or horizontally to copy the value.

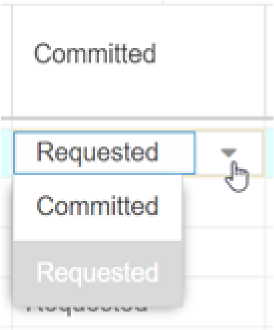


3.10.5 Showing committed work data

The work data shown in the scenario are requested data by default. If TPG TeamManager is used for resource commitments, committed work data can be shown for individual projects:

- Go to the project table and double-click in the *Committed* cell of the project.

- Open the drop-down menu and change the value from *Requested* to *Committed*.
  The value will be saved and applied for all users of the scenario. It can be changed at any time.



- Update 52 the project.
  The work hours will be updated from the *Commitments* rows in TPG TeamManager.