

CHECKLIST

Setup

GENERAL TIPS

- ☐ Goals and feature scope defined
- ☐ Options enabled or disabled as needed

PORTFOLIO AND RESOURCE STRUCTURE

- ☐ Structural requirements (reporting, access) defined
- ☐ Portfolio and project structure defined
- ☐ Resource and team structure defined

PERMISSIONS AND ROLE MANAGEMENT

- ☐ Role and permissions concept defined
- ☐ Visibility vs. restrictions defined
- ☐ Permissions assigned via teams
- ☐ Tool visibility defined via teams
- ☐ Approval processes (workflows) planned where needed

PROJECT TYPES AND CLASSIFICATION

- ☐ Project types defined based on use cases
- ☐ Unneeded tools disabled for each project type
- ☐ Custom fields created and assigned
- ☐ Classifications defined for evaluations where needed

PROJECT PIPELINE

- ☐ Pipeline and phase model defined
- ☐ Process gates defined where needed and taken into account in project templates

TASK CATEGORIES

- ☐ Task categories defined for analysis

COST TYPES

- ☐ Cost types defined and aligned with financial or ERP systems

RISK CATEGORIES

- ☐ Risk categories defined across projects

STATUS REPORTS AND PROJECT EVALUATIONS

- ☐ KPIs and status traffic lights defined
- ☐ Automatic thresholds reviewed
- ☐ Reporting interval set

CALENDAR

- ☐ Calendars defined and assigned to teams where needed

CRITERIA

- ☐ Criteria for Portfolio Analysis defined
- ☐ Default Portfolio Analysis view set in the dashboard
- ☐ Criteria for Idea Management defined

PROJECT TEMPLATES

- ☐ Master template created
- ☐ Additional templates defined

SYSTEM SETTINGS

- ☐ Notifications configured
- ☐ Default language set
- ☐ Project numbering configured
- ☐ Progress mode set
- ☐ Traffic light thresholds set
- ☐ Resource utilization limits set
- ☐ System currency set