



PLANFORGE GUIDE

Setup

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TARGET AUDIENCE of the Guide



This guide is intended primarily for:

- **Planforge admins**, as many of the settings described require administrator rights.
- **Key users**, who take the lead in using Planforge within their departments and share their knowledge with their teams.

Both roles can overlap – some key users will also have admin rights.

Recommendation:

Ideally, this guide should be worked through together with key users from all departments where Planforge is being introduced. This allows department-specific requirements to be taken into account in the early stages of the configuration.

STEP 1

General Tips



1. STEP-BY-STEP INTRODUCTION

- **Start with an empty site** – avoid demo data so you can build structures and content cleanly according to your requirements.
- **Start with just a few features** and expand them step by step. You can enable and disable options under *System Settings > CUSTOMIZE > Options* to get to know Planforge systematically.

	Name	Enabled
	Enterprise Agile Option	☐
	Program Management Option	☒
	Status Reporting Option	☒
	Portfolio Analysis Option	☒
	Idea Management Option	☒
	Gate Management Option	☒
	Risk Management Option	☒
	Stakeholder Analysis Option	☐
	Strategic Management Option	☒
	Jira Connector Option	☒
	Confluence Connector Option	☐
	SAP Connector Option	☒
	Teams Connector Option	☒

- **As a guiding principle**, always consider what information you want to be able to get out of Planforge later, and design your structures with this goal in mind.

2. PILOT PHASE IN ONE DEPARTMENT

- **First introduce Planforge in a single department** within a playground environment.
- Once this department has gained sufficient experience, **roll Planforge out to further departments.**

3. PORTFOLIO STRUCTURE DURING THE PILOT PHASE

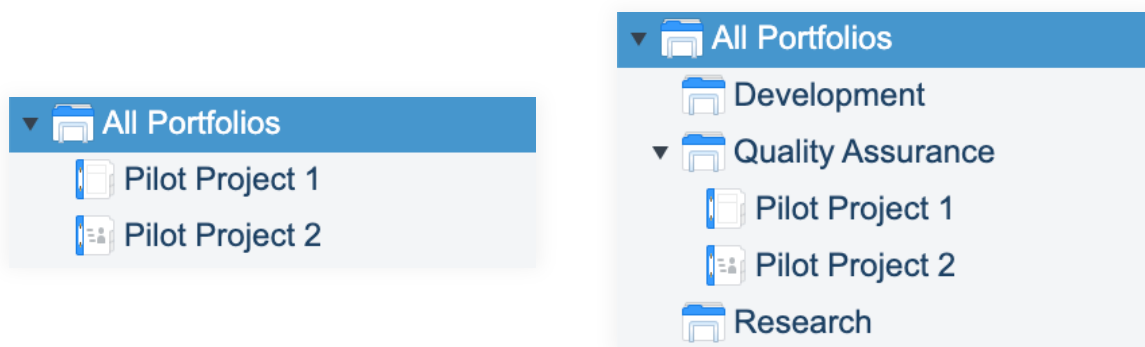
- For your first portfolio structure, you can start in the **root portfolio ("All Portfolios")**.
- When further departments are added, you can flexibly **move the existing first portfolio out of the root into its own sub-portfolio.**

Example:

You start in the *Quality Assurance* department and initially create portfolios and projects directly under the root portfolio.

When *Research* and *Development* are added later, create a separate portfolio for each department in the root portfolio. Move the *Quality Assurance* projects and portfolios into the corresponding portfolio.

In the end, all department portfolios are on the same level.



4. RESOURCE STRUCTURE DURING THE PILOT PHASE

- This approach also works for **teams**, but requires **more foresight**, since not all existing teams or resources belong to the first department.
- Moving teams and resources can therefore involve additional effort.

5. KNOWLEDGE TRANSFER AND COLLABORATION

- Analyze **which experiences from the first department can be generalized** and which cannot.
- **Involve key users from other departments** early on and work through the steps in this guide together. Each department has **its own requirements** that should be taken into account.

6. IDENTIFY QUICK WINS

- Record **quick wins** that lead to significant improvements in the first department.
- Typical examples: **status reports, templates, simple projects**.

7. QUALITY ASSURANCE AND REVIEWS

- **First review:** after 2–4 weeks
- **Second review:** after about 3 months

Guiding questions:

- What is going well?
- What could be improved?
- Where is support needed?
- Does the initial configuration match daily use?
- Are there new or changed requirements?

STEP 2

Portfolio and Resource Structure



A well-thought-out structure for portfolios and resources is the foundation for working efficiently with Planforge.

1. GUIDING PRINCIPLES

- **KISS principle (Keep It Simple and Straightforward):**
Keep structures as simple as possible. They should serve a clear purpose, not exist for their own sake.
- **Ask yourself:**
 - *What information do I want to see or communicate in reports?*
 - *What data should Planforge provide me with?*
- **Define requirements**
Create a list of these requirements and align your portfolio and resource structure accordingly.

2. RELATIONSHIP TO THE ORGANIZATIONAL STRUCTURE

Your existing organizational structure can be a good **starting point** for the portfolio and resource structure – especially at the **upper hierarchy levels**.

Again, keep in mind what information you want to draw from Planforge.

Example:

If you only need department-level information in reports, it is not necessary to create sub-departments.

3. USING LINKS

Planforge allows **business objects to be linked**, so the same objects (e.g. projects, programs, or resources) can be displayed in multiple places.

- **Portfolio example:**

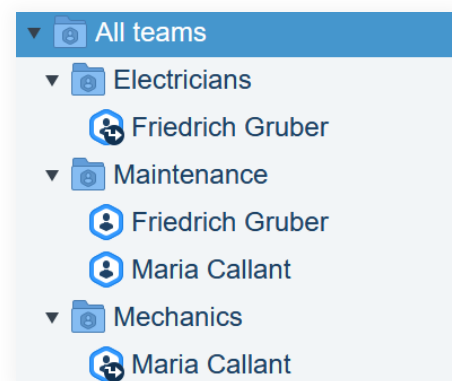
Create a separate **strategy portfolio** that is used to pass information on to management.

No projects of its own are created in this portfolio; instead, **projects from the productive portfolios are linked in.**



- **Teams example:**

The actual resources are organized into department teams. In addition, you organize teams by **occupation or specialization** (e.g., all electricians, all mechanics) with linked resources. This lets you analyze utilization separately for **individual departments** as well as by **occupation**, and also makes it easier to **assign** resources to projects **based on their competencies**.



4. TAKING PERMISSIONS INTO ACCOUNT

The planned **permissions** also influence the portfolio and resource structure. If certain areas or data need to be restricted, they must exist as **separate business objects** within the structure. You can find more on this in the next chapter.

STEP 3

Permissions and Role Management



Access in Planforge is precisely controlled through roles and permissions – so each resource sees exactly what is relevant to them.

1. ROLES CONTROL PERMISSIONS

- **Roles** define **what a resource is allowed to do**.
- Roles are created under *System Settings > CUSTOMIZE > Roles* and consist of **individual rights** that can be activated or deactivated via checkbox.

Project, Template or Portfolio Role Properties

Role

Name: Project Manager

Description: A project manager is responsible for planning, managing, monitoring, and successfully completing a project.

General Rights

☒ Observe	☐ Administrate
☒ Manage	☒ See costs

Portfolio Rights

☐ Manage strategy
☐ Submit idea
☐ Manage idea

Project Rights

☒ Track time and progress	☒ Edit project plan
☒ Track costs	☐ Change pipeline stage
☒ Contribute	☐ Change baseline
☒ Create meetings	☐ Adjust budget

Cancel OK

- **Resources or teams** are given a role for specific **business objects** (e.g. project, portfolio, or report). The role is given in the **permissions** of that business object.

Example:

The *Project Manager* role contains all the rights needed to manage a project.

When the resource *MelindaW* is assigned to a project, she receives the *Project Manager* role in the permissions of that project and can thereby perform all actions belonging to this role.

Select Resources or Teams

Choose Roles

Project Manager

Find Resources

Name	Full Name	Description
Alle Teams External IT Marketing Organization PMO		
AnnaM	Anna Müller	Project manager
LukasW	Lukas Weber	Project manager
Administrator		

2. GUIDING PRINCIPLES

- **Transparency simplifies many things:**
Consider *which information is strictly confidential* and where access restrictions are therefore necessary.
- **As few restrictions as possible:**
Everything that can remain open makes the role system simpler and reduces maintenance effort.

3. CONTROLLING ACCESS THROUGH THE STRUCTURE

Visibility is inherited:

If a *parent* object is restricted or invisible, this automatically applies to all objects below it.

For users to be able to see a specific object, they must have the "Observe" right for all ancestor objects (e.g. portfolios and teams) in the navigation path.

Teams instead of individuals:

Wherever possible, assign permissions to *teams*, not to individual resources.

Example:

If you have organized your teams in the resource structure by occupation as well, you can assign the entire "Mechanics" team to the project instead of assigning each individual resource.

4. DEFINING ROLES

A clear and simple role structure makes administration easier and provides transparency about who has which permissions.

Approach:

- Apply the KISS principle: keep it as simple as possible.
- Check whether your organization **already has established roles** that can be adopted.
- Define roles based on the **Planforge features you use**. Example: If you use the *idea management option*, you need corresponding roles with appropriate rights.

- Name roles **according to the scheme customary in your organization.**

Typical role examples:

Role	Typical Permissions
PMO	All permissions; steps in when others' permissions are insufficient
Portfolio Manager	Observe, Manage, See costs, Manage strategy
Project Manager	Observe, Manage, See costs, Contribute, Create meetings, Edit project plan, etc.
Resource/Team Manager	Observe, Manage, See costs, Edit unavailabilities, Assign to projects
Contributor	Observe, Contribute

5. DEFINING TOOL VISIBILITY VIA TEAMS

In a team's *Properties*, you can specify under *Settings* which tools should be visible to the resources it contains.

The screenshot shows the 'Settings' tab of a dialog box. At the top, there are tabs for 'General' and 'Settings', with 'Settings' being the active tab. Below the tabs are icons for 'Assign', 'Cancel', and 'Save'. The main section is titled 'Tools'. Below this title, there is a checkbox labeled 'Overwrite Tool Visibility' which is checked. Below the checkbox is a table with two columns: 'Tool' and 'Visible'. The 'Tool' column lists various tools, and the 'Visible' column contains checkboxes for each tool, all of which are checked.

Tool	Visible
MY WORK	☒
To-Dos	☒
Activities	☒
Projects	☒
Time & Costs	☒
PORTFOLIOS	☒
Projects	☒
Overview	☒
Properties	☒
Project Charter	☒
Context	☒
Evaluation	☒

Combined with roles, this lets you control access to specific areas of Planforge with great precision.

Example:

Two resources both have a role with the *Observe* right for a project. This means they can view the project and its content. However, one of the resources belongs to a team for which *Controlling* has been disabled under *Settings*. As a result, that resource cannot view this area within the project.

6. WORKFLOWS FOR ADVANCED ACCESS MANAGEMENT (OPTIONAL)

Workflows ensure that certain actions are only carried out **after approval by a resource or team** with a defined role.

Example:

A resource has the appropriate role to change the *pipeline phase*, but the change only takes effect once it has been approved by another resource with a specific role.

Recommendations:

- If you are unsure whether you need workflows, start **without them first** – that's simpler.
- If you are planning workflows, **include them when creating roles** and configure them in parallel.
- During the **test phase**, it is advisable to activate workflows only **at the end** in order to avoid unnecessary approvals during testing.

You can find the workflow settings under: *System Settings > CUSTOMIZE > Workflows.*

Workflow	Active	Required	Send Notifications	Decider Roles
 Project Status Report Approval	☐	☐	☐	Portfolio & Project Administrator
 Budget Change Approval	☒	☒	☒	Portfolio & Project Administrator
 Change Request Approval	☒	☐	☐	Portfolio & Project Administrator
 Pipeline Stage Approval	☒	☒	☒	Portfolio & Project Administrator
 Close Down Project Approval	☒	☐	☐	Portfolio & Project Administrator
 Project Decision Approval	☐	☐	☐	Portfolio & Project Administrator
 Baseline Change Approval	☒	☐	☐	Portfolio & Project Administrator
 Resource Absence Approval	☒	☐	☐	Resource Administrator
 Resource Assignment Approval	☒	☐	☐	Resource Administrator

STEP 4

Project Types and Classification



Spending time on defining your project types and classifications will make it easier to structure, control, and evaluate your projects in Planforge.

1. PROJECT TYPES

With **project types** you determine,

- which **custom fields** are displayed in a project,
- which **tools** are available in the project, and
- which **dashboards** are displayed in the project cockpit.

This keeps every project focused on the essentials, both in the work of project team members and in the **flow of information** within and outside the project.

Before defining project types, consider:

- Are there existing project types in the organization that can be transferred to Planforge?
- Which additional project types might make sense?

Analyze the similarities and differences among your projects and consider how you can summarize and map these using **project types** and **custom fields**.

Best Practices:

- **Hide unneeded tools:**
For example, if a project type doesn't need RACI or gate management, disable these features.

- **Project type ≠ methodology:**

The project type is independent of the project methodology used. A project type can be applied to projects using any methodology.

Edit Custom Type

General Tools Dashboard

Title Grant-Funded Project / Public Investment

Name PUBLIC_GRANT_PROJECT

Description Project type for projects funded by public funds, with defined budget requirements, milestones, and reporting obligations to funding authority oversight bodies.

Tab Title Grant-Funded Project

☐ Use as default type

WBS code format for new projects Default

Status reporting period for new projects Default

Cancel

Edit Custom Type

General Tools Dashboard

Tool	Visible
Planning	☒
Work Breakdown (WBS)	☒
Epics	☐
Deliverables	☐
Activity List	☒
Schedule	☒
Stories	☐
Sprints	☐
Capabilities	☐
Features	☐
PI Board	☐
Kanban	☒
Utilization	☒
Costs	☒
Backlog	☐

You can find the settings for project types and custom fields under: *System Settings > CUSTOMIZE > Projects.*

2. CUSTOM FIELDS

Custom fields capture project-specific information. The project type controls which of these fields are visible in the project.

Examples:

- Guidelines or specifications
- Components used
- Integrations with other systems
- SAP cost centers or budget codes

Custom fields can be defined independently of project types and used across them.

×

Edit Custom Field

General

Advanced

Title

Funding Rate (%)

Name

Funding Rate (%)

Type

Number

Possible Values

Format

Description

Percentage of eligible project costs covered by grant funding. Example: With a funding rate of 60%, 60% of the eligible project costs are covered by the funding program.

☐ Required
 ☐ Unique

Visible for

Project Manager

Test Formula...

Cancel

OK

3. CLASSIFICATION

The **classification** is used to categorize and group projects. It is useful for **comparing** different projects and **supports** different **evaluation** approaches.

Examples:

- Distinguishing between **internal** and **external** projects
- Filtering by classification in **reports and evaluations** to obtain focused data

×

Classification Properties

Name

Internal Project

Description

A project without an external client that serves the organization's own needs, e.g., process optimization, implementation or further development of internal systems, organizational development, or compliance initiatives.

Cancel

OK

Classifications can be assigned **retroactively** and also apply to **existing projects**.

You can find the classification settings under: *System Settings > CUSTOMIZE > Classification*.

4. PROJECT TYPES VS. CLASSIFICATION

	Project Types	Classification
Complexity	More effort to configure	Easy to set up
Level of detail	High level of detail through multiple custom fields and field types per project	Low level of detail, as only one fixed category per project is possible
Purpose	Structuring and filtering via fields	Grouping and filtering of projects

Project types and classifications complement each other: while project types control structure and content, classifications serve categorization and evaluation.

- Use **project types** when projects need different fields, tools, or structures.
- Use **classifications** to easily categorize projects and filter or compare them in reports.

STEP 5

Project Pipeline



A well-structured project pipeline provides an overview of the progress and status of projects.

1. BASIC PRINCIPLES

In most cases, **one pipeline is sufficient**. Multiple pipelines only make sense when business areas use very *different phase models*, for example:

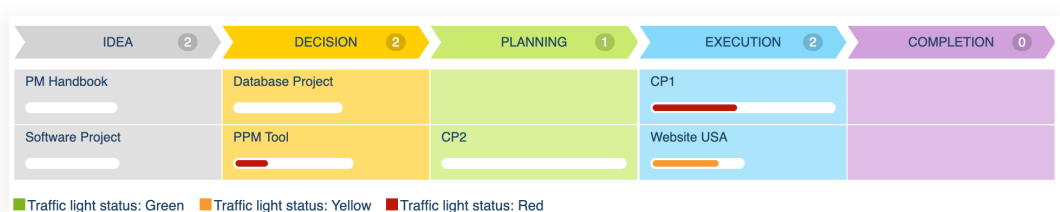
- **Marketing pipeline** with campaign phases
- **Development pipeline** with technical milestones

2. DEFINING PHASES

Consider **which phases** are meaningful for your projects and best reflect **project progress**. This lets you see at a glance where a project currently stands.

Examples of typical phases:

- Idea or initiation
- Planning
- Implementation
- Completion



You can adjust the project pipeline under [System Settings > CUSTOMIZE > Pipelines](#).

3. GATE MANAGEMENT (OPTIONAL)

Pipelines also allow you to use **Gate Management**, an additional option in Planforge.

With **process gates**, you can control and monitor pipeline phase progress more precisely. Consider which **phase transitions are particularly important** and where a gate therefore makes sense (e.g. from planning to implementation).

STEP 6

Task Categories



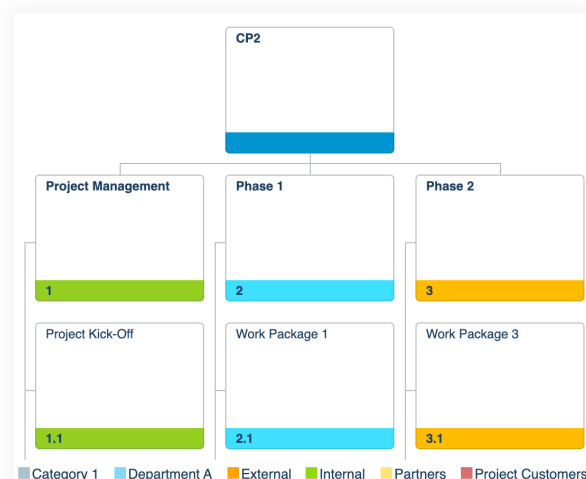
Task categories increase the clarity and readability of project plans. Different categories can be **displayed in different colors**.

Advantages:

- Easier navigation of the project plan
- Better analysis by type of activity (e.g. share of quality assurance or research departments in total effort)
- Visual separation by responsibility or area of work

Examples of color and category logic:

- All tasks of a **department** → **blue**
- All **internal** tasks → **green**
- Tasks from **project customers** → **red**
- Tasks from **partners** → **yellow**



You can customize tasks under *System Settings > CUSTOMIZE > Categories*.

STEP 7

Cost Types



A clear definition of **cost types** ensures consistent budgeting, evaluation, and consistency with other systems.

1. REVIEW EXISTING COST TYPES

First determine **which cost types are already used in your organization**, and transfer them to Planforge under *System Settings > CUSTOMIZE > Cost Types*.

This keeps your project cost structure compatible with internal financial processes.

2. CONGRUENCE WITH FINANCIAL SYSTEMS

Compare the cost types created in Planforge with those in your **financial or ERP systems** (e.g. SAP).

A congruent structure makes the following easier:

- Budget control
- Report creation
- Data exchange between systems

3. KEEP IT SIMPLE (KISS PRINCIPLE)

Define **only the cost types you actually need**. Deactivate unnecessary cost types to maintain clarity and avoid incorrect records.

STEP 8

Risk Categories



Risk management is an additional option in Planforge that lets you *capture, assess, and categorize project risks and measures, and assign them to tasks.*

1. IDENTIFY RISKS

Consider **what risks your projects are typically exposed to.**

Examples:

- Cost risks
- Schedule risks
- Technical risks
- Resource risks
- Misc. risks

Risk / Response	Category
▼ ⓘ Budget overrun	Budget
ⓘ Obtain multiple quotes	
ⓘ Include a budget contingency	
▼ ⓘ Delay in project schedule	Technology
ⓘ Coordinate with responsible auth	
▼ ⓘ Unavailability of a key person	Global / Economic
ⓘ Establish backup resources	
ⓘ Document important project infor	

2. FORMING CATEGORIES

Risk categories help you record risks systematically, **make them comparable, and evaluate them across projects.**

Group similar risks into **meaningful, generally applicable categories**
The categories should be relevant to the majority of your projects so that comparisons are possible.

You can create categories under *System Settings > CUSTOMIZE > Risk Categories* .

STEP 9

Status Reports and Project Evaluations



Status reports are an additional option in Planforge. They are created manually and present the project status based on recorded project metrics. **Status traffic lights** show how well the project is progressing and how closely it matches the plan.

They require **little effort to configure** and maintain, and make it easier to communicate project progress.

1. DEFINING OBJECTIVES

First consider **what information is relevant for your** project sponsors or the steering committee.

Based on this, determine:

- which **traffic lights** should be displayed,
- which **evaluations** should be included,
- and at which **interval** status reports should be created.

2. CONFIGURING TRAFFIC LIGHTS

Status reports use **four traffic lights** by default:

- **Status**
- **Schedule**
- **Resources**
- **Costs**

These traffic lights can be set to **Automatic**. The traffic light status is derived from the linked fields defined under "**Field Name**".

You can configure the traffic lights under *System Settings > CUSTOMIZE > Traffic lights*.

Field Name	Name	Enabled	Automatic
general	Status	☒	☒
dates	Dates	☒	☒
resources	Resources	☒	☒
costs	Costs	☒	☒

You can find the thresholds for automatic traffic lights under *System Settings > ADMINISTERATE > Settings > Project Administration Behavior > Levels for automatic status indicators for projects and pipeline*.

The **overall status** ("Status") is automatically derived from the traffic lights for schedule, resources, and costs. The worst traffic lights determines the status:

- **Green** only if all sub-traffic-lights are green.
- **Yellow** if at least one sub-traffic-light is yellow.
- **Red** if at least one sub-traffic-light is red.

3. SETTING THE REPORTING INTERVAL

The default interval between two status reports is **one month**. This setting can be adjusted:

- **Globally:**
System Settings > ADMINISTERATE > Settings > Project Administration Behavior > Status reporting period (default)
- **Per project:**
Project Properties > Advanced > Settings > Status reporting period (default)

STEP 10

Calendar



Calendars control the **non-working days and holidays** that are taken into account for **project planning and resource availability**.

1. DEFAULT CALENDAR

If you use only one calendar, use the **default calendar** under *System Settings > ADMINISTERATE > Settings > Dates and Currency*. This applies automatically to all projects unless another calendar is defined.

If your organization **uses only one calendar**, you can skip the next points.

2. USING MULTIPLE CALENDARS

If you have **multiple locations or projects in different countries or regions**, it is advisable to define **separate calendars** under *System Settings > CUSTOMIZE > Calendars*.

Examples:

- International organization with projects in **Germany, Austria, and Switzerland**
- National organization with different public holiday rules **between states/provinces**

Calendar Properties

Name

United States of America

First Workday

Monday

▼

Last Workday

Friday

▼

Work Hours per Day

8.00h

Holiday Calendar

United States

▼

Allow scheduling

☐ on all days

☒ on working days

☐ only on weekends and public holidays

Cancel

OK

3. CALENDAR ASSIGNMENT AT THE PROJECT LEVEL

Once you have created multiple calendars, you can specify individually for each project which calendar should apply. To do this, go to *Project Properties > Advanced > Settings > Calendar*.

STEP 11

Criteria



Criteria are used in the *Portfolio Analysis* and *Idea Management* options.

- In **Portfolio Analysis**, customizable criteria enable a detailed evaluation of projects and portfolios, which can be visualized graphically in the analysis area.
- In **Idea Management**, criteria are used to evaluate submitted ideas.

1. DEFINING EVALUATION CRITERIA

Consider which criteria are meaningful and useful for evaluating your projects or ideas.

Typical basic criteria are:

- **Urgency**
- **Importance**

You can define criteria under *System Settings > CUSTOMIZE > Criteria* for both projects and ideas .

2. CRITERIA FOR PORTFOLIO ANALYSIS

For portfolio analysis, it is advisable to use **linked or automatic criteria (also known as bottom-up or top-down criteria)**.

When creating a criterion, you can link it to a field (e.g. planned costs). The evaluation is then automatically derived from that field.

Name	D...	Linked Field	Active
Importance			☒
Urgency			☒
Strategy			☒
Compliance			☒
Plan Costs		Plan Costs	☒
Plan Effort		Plan Effort	☒
Pipeline Stage		Pipeline Stage	☒
Status		Status (Traffic Light)	☒

The **Eisenhower Matrix** with the criteria **Urgency** and **Importance** on the two axes is well suited as a basic visualization.

The display of the portfolio analysis in the portfolio dashboard is controlled via the default view.



You can see the portfolio analysis visualization under *Portfolio > Analysis > Bubble Chart* and the idea analysis under *Portfolio > Ideas > Bubble Chart*.

STEP 12

Project Templates



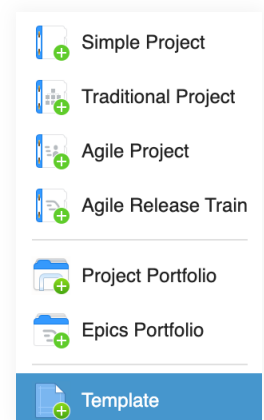
Project templates make project creation easier and faster, as, for example, recurring activities don't need to be created again.

A good project template is **general enough** to be usable for multiple projects, yet **specific enough** to offer real added value compared to an empty project.

1. IDENTIFYING CONTENT

Consider which content regularly recurs in your projects, for example:

- Is the project management phase always the same?
- Are there standards or norms that must be reflected in every project?
- Which to-dos occur in multiple projects?



2. STRUCTURE OF TEMPLATES

The following structure is usually useful:

- **Master template**
Contains general project standards and the activities of the project management phase.
- **Additional templates based on the master template**
These can be adapted to different requirements, e.g. from departments.

Existing projects from **MS Project** can also be imported and used as project templates.

STEP 13

Notifications



Under *System Settings* > ADMINISTRATE > *Notifications*, activate the notifications you want to receive.

Notes:

- Notifications are sent **based on roles**.
- Resources that hold the respective role for the triggering business object receive an **email notification** sent to the address defined in Planforge.
- Adjust the notifications so that only **relevant events** are reported – this reduces information noise.

STEP 14

Final System Settings



Under *System Settings* > ADMINISTRATE > *Settings*, make the final configurations and define the following points:

- **Default language:**
Which language should be set by default for new users?
- **Automatic project numbers:**
Should project numbers be assigned automatically?
- **Default progress mode:**
Which progress mode should be set by default in projects?
- **Traffic light levels:**
Which thresholds should apply to status, schedule, or cost indicators?
- **Resource utilization:**
Which limits should apply to resource utilization?
- **System currency:**
In which currency should default values be displayed and calculated?
- **Holiday calendar:**
Which calendar should apply by default for projects?

IN CONCLUSION

Next Steps



With the steps described in this guide, you create the foundation for a system that makes projects transparent, teams efficient, and decisions traceable.

WHAT COMES NEXT?

In addition to the basic configurations described, there are options available that let you expand your project landscape as you need.

The following options are available in Planforge:

- Program Management
- Enterprise Agile
- Gate Management
- Risk Management
- Stakeholder Management
- Status Reporting
- Portfolio Analysis
- Strategic Management
- Idea Management

In addition, Planforge can be integrated into existing systems – for example via connectors to **Jira, Confluence, SAP or Microsoft Teams** as well as via **Single Sign-On**.



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