

TPG CoRePlanner

Project and Budget Planning in SharePoint – Better than Planning with Excel Alone

Name	SAP WBS	Details	2015					2016							
			JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
Work			2,00	3,00	3,00	9,00	9,00	7,00	6,00	9,00	9,00	4,00	4,00		
Cost			47.000	83.000	63.000	186.000	176.000	144.000	128.000	185.800	185.800	90.400	90.400		
Work			2,00	3,00	3,00	4,00	4,00	2,00	1,00						
Cost			32.000	48.000	48.000	64.000	64.000								
Work															
Cost				20.000		10.000									
Work															
Cost			15.000	15.000	15.000	15.000	15.000								
Work							5,00	5,00							
Cost							97.000	97.000							
Work								5,00	5,00						
Cost								72.000	72.000						
Work															
Cost												25.000	25.000		
Work															
Cost															
Work															
Cost															

COMPATIBILITY: SharePoint 2010 - 2016, SharePoint Foundation

When you are planning projects and cost centers, you know how it is with Excel – you end up with different versions of the file, stored in different locations. And then you still have to add in your finance department’s budgeting requirements. You will not have this problem when you work with Microsoft Project Web App. Still, you will not be able to plan cost resources or enter time-phased information on work and costs.

Using Excel or Project Web App for project and budget planning limits what you can do and is also more labor-intensive. This is where TPG CoRePlanner can help. Whether you are a project manager or a cost center manager, you can do all your budget and project planning with a tool that has been specially developed for that purpose. It will make you much more efficient.

THE BENEFITS:

- ▶ Simple and fast work and cost planning
- ▶ Easy-to-use interface with only the most essential functions
- ▶ Working like Excel but with more advantages
- ▶ Minimal training requirement (1-2 hours)
- ▶ Budget planning is based on flexible rates of exchange
- ▶ Maximum data quality with centralized data storage
- ▶ If required: direct data transfer to ERP systems

FEATURES AT A GLANCE:

- ▶ Centralized data storage in SQL Server
- ▶ Configurable structure for project tasks
- ▶ Resource capacity and cost rates are variable over time
- ▶ Currency conversion is be variable over time
- ▶ Check-in/check-out function

BENEFITS COMPARED TO EXCEL

- ▶ Central data storage
- ▶ Centrally defined user fields and pick lists
- ▶ Easy handling of different currencies
- ▶ Compatible with most browsers
- ▶ No issues with versioning
- ▶ Stable

BENEFITS COMPARED TO MS PROJECT SERVER

- ▶ Cost resources (PWA)
- ▶ Planning in time phases (PWA)
- ▶ Copying from Excel (PWA)
- ▶ Easy handling of different currencies
- ▶ Lookup tables with several columns
- ▶ User fields at assignment level

Name	Work	Cost	2015												2016											
			Details	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL										
▼ Work int EUR	35,00	587.200	Work	2,00	3,00	3,00	4,00	4,00	2,00	1,00	4,00	4,00	4,00	4,00												
			Cost	32.000	48.000	48.000	64.000	64.000	32.000	17.600	70.400	70.400	70.400	70.400												
Software	19,00	305.600	Work	2,00	3,00	3,00	4,00	4,00	2,00	1,00																
			Cost	32.000	48.000	48.000	64.000	64.000	32.000	17.600																
Implementierung	16,00	281.600	Work								4,00	4,00	4,00	4,00												
			Cost								70.400	70.400	70.400	70.400												
▼ Work int USD	30,00	427.200	Work				5,00	5,00	5,00	5,00	5,00	5,00	5,00													
			Cost				72.000	72.000	72.000	70.400	70.400	70.400														
Hardware	30,00	427.200	Work				5,00	5,00	5,00	5,00	5,00	5,00														
			Cost				72.000	72.000	72.000	70.400	70.400															
▼ CAPEX		30.000	Work																							
			Cost		20.000		10.000																			
Software		30.000	Work																							
			Cost		20.000		10.000																			
▼ Work ext		335.000	Work																							
			Cost	15.000	15.000	15.000	40.000	40.000	40.000	40.000																
Software		105.000	Work																							
			Cost	15.000	15.000	15.000	15.000	15.000	15.000	15.000																
Hardware		150.000	Work																							
			Cost				25.000	25.000	25.000	25.000																
Implementierung		80.000	Work																							
			Cost																							

Work resources with different currencies and cost resources, matrix for resource assignment

WORK COMFORTABLY AND EFFICIENTLY

TPG CoRePlanner allows you to work in your preferred browser in a similar way to Excel. The concise interface helps you concentrate on the essential functions and makes the product very easy to use.

Another advantage is that your data is stored in a central database. That eliminates the hassle of working with several different Excel files. You can also involve your finance department in the process by connecting the solution to an ERP system, such as SAP.

BUDGET PLANNING REQUIRES RELIABLE DATA

To really help you make your budgets more reliable, TPG CoRePlanner provides a time-phased conversion of work into costs.

If you are using resources with a currency different from the project, the tool calculates the costs accordingly using an exchange rate, you can adapt the rate every month if required.

The data is stored in a central database, an important prerequisite for the quality of your data.

VIEWS AND TOOLS TO SUPPORT YOUR TASKS

With a flexible range of options for views, you always have an overview of the current situation, even in large projects. As with Excel, you can work with spreadsheets and toggle between the task and resource views. You can also simply copy and paste your existing data into the tool from Excel.

As an alternative, an easy-to-read matrix enables you to assign resources to tasks. Using the “move selection right” command you know from Excel, you simply drag and drop your data along the time line.

ENHANCED DATA FOR THE FINANCE DEPARTMENT

The user-defined fields enable you to assign planning content and resources to objects from an ERP system, such as cost centers and types, WBS elements, CO orders etc.

Data sets prepared in this way can be sent to and from the ERP system, reliably and conveniently, using integration tools like TPG PSLink.

That makes a decisive contribution to efficient collaboration between your project managers and financial staff.