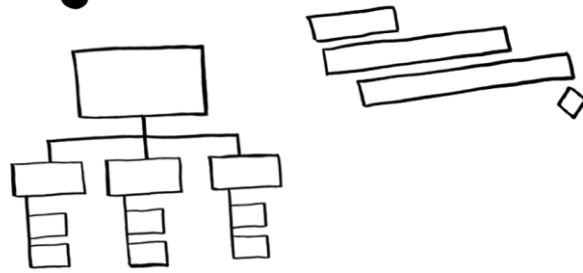


User Manual

next
project^{light}



For the few
heroes who still
read them.

General

next project light

The tool next project light (formerly known as V4.1 “project handbook.xls”) supports project managers when planning and controlling projects. It helps with calculating dates, resources and costs, visualizing plans and deviations and documenting all project plans in one file.

The tool next project is based on a simple MS Office architecture (primarily MS Excel with VBA). Data can be exchanged optionally via Excel-Files with MS Project or other project handbooks. Data can also be exchanged with the tool next portfolio light via a file import or through an MS Access database.

next project light+

next project light+ is an extended version of next project light. It is presented in specific next level academy trainings and is provided by next level trainers during those trainings. This tool supports the user by having less restrictions and additional editable tabs compared to next project light.

next project

The tool next project (formerly V3.2 “project handbook.xls”) provides the user with more content and functionality. next project requires the user to obtain a license, thus it is not considered freeware. As a result, it also features more PM methods (e.g. Critical Path Methodology), limit of tasks and levels, as well as resource and cost types. Moreover, it contains more interfaces (MS Project, MS PowerPoint, MS Outlook, MS SharePoint, next portfolio).

A detailed comparison between the two versions of next project can be found in a separate document “npj_Info_Sheet_Version_Comparison.pdf”.

Manual

The manual describes the functions of next project light in a simple and comprehensible way. You can find a Quick Start Guide as well as detailed instructions enhanced with screenshots. The manual does not explain theoretical project management approaches and thus only covers the supported PM methods to some extent. Specific roles and processes are not covered at all. The manual is for reference use only; experience shows that it cannot replace a tool-training.

The manual primarily explains the functionality of next project light and next project light+. While both versions are similar to next project to some extent, next project is treated in a separate manual.

Right of Use and Customizing

The tool next project light was developed by next level solutions and belongs to next level holding GmbH. Under licensing agreements, the right of use will be granted to the licensee for a license fee (generally indefinitely).

Due to its simple architecture the tool can be adapted with little effort according to the customers' specific requirements and system environments and implemented on short notice. The simple MS Office architecture results in limited technical framework; however, it is well-suited to react quickly to dynamic changes of requirements, organisational structures, and system environment.

Still, next level does not provide customizing for next project light versions. On the other hand, next project can be customized extensively. More on that topic can be found in the next project user manual.

The manual is property of next level holding GmbH; it can, however, be distributed to or copied for all users within the scope of the license.

Regardless of the technical possibilities, customers are not allowed to use and / or distribute the tool and the manual beyond the agreed scope of license, nor may technical changes be made that exceed the described tool functionality.

References to the owner must stay intact and logos and/or footnotes may not be changed or deleted.

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Quick Start

Basics

next project light contains several visible tabs. Some tabs contain forms with no special functions, while some tabs are designed to be completely automatic. Many tabs correspond to classic PM methods, but there is also a central “Data” sheet which – similarly to the approach of classic PM software applications – is used to define tasks. Most actions are triggered by clicking a button; however, there are certain calculations and graphics that are triggered/updated when cells are edited, or any changes are made to the tabs. Depending on the computer, the amount of project-specific content, and the actions put in, short delays might happen compared to other conventional PM software applications. Therefore, the “Refresh” button on each sheet, and the button on the navigation bar, which rebuilds all charts / reports based on the “Data” sheet, are highly relevant.

next project light can be used independently; however, it is also possible to exchange data with other tools/applications.

Procedure

- > Open the empty template and save the PHB under the project-specific name.
- > If needed, change the language on the “Cover” page.
- > Enter the project name on the “Cover” page.
- > First, fill in the project assignment manually or transfer the data later from the detailed planning (“Data”) with the button “Get detail data”.
- > Enter project manager and project owner as well as the allocation of the central roles in “Assignment”.
- > Use the navigation bar to add new tasks, and to structure the project into summary tasks, WPs and milestones.
- > Name the tasks, assign each WP to a WP-responsibility and fill in the dates, resources and costs in the “actual” columns (only the bottom level is editable and “base” columns are locked for manual input).
- > Click the button “Refresh Graphics” on the navigation bar and visualize the “Data” sheet’s current detailed planning as WBS, Gantt, etc. With this action, the effort and costs are linearly distributed over time.
- > Plan further PM methods.
- > Save a base plan (reference plan) for the dates, resources and costs via the “Options” in the navigation bar on the “Data” sheet.
- > While controlling, periodically update the project data by adapting the reporting date on the “Cover” sheet. Above all, adapt the dates, resources and costs in the “Data” sheet in the “current” column. Also add effort and costs that already occurred to the “actual” columns of resources and costs.
- > In addition to the visualization of the current project plans, central project information can be compactly consolidated via the “Status”. The status report can be exported via the “MS PowerPoint Export” button and saved cyclically.
- > Export extracts of the project plan to next portfolio light.

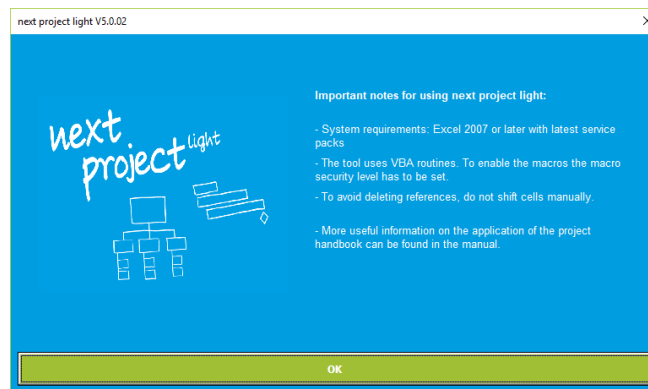
Basic Configuration

System Requirements and Notes for Using MS Excel

For next project light to work properly, systemic frame conditions and some restrictions in the use of MS Excel must be considered. Starting with version 3.3, next project requires at least MS Excel 2007 and VBA. Be careful not to use Drag & Drop or Cut & Paste.

General information on handling all next level solutions' tools based on MS Excel can be found in a separate document "Important Technical Notes when Working with MS Excel Based Tools".

If, by incorrectly using next project light, forms and formatting are no longer correct, any corrupted version of the file is broken forever.



Restrictions

Based on technical conditions and typical project designs, the following restrictions in next project light should be followed to guarantee adequate performance and an acceptable file size:

next project light

- > 50 tasks (incl. summary tasks and milestones)
- > 3 input levels (incl. project level) and 30 project phases
- > 1 resource, 2 cost types (1 automatic and 1 manual)
- > 6 years project processing time (for resource and cost distribution, Gantt Chart timeline displays are only possible for reasonable lengths of time)
- > 1 project manager, 1 project owner, a total of 50 people in a PM team
- > 10 objectives and non-objectives, 8 project stakeholders, 250 to dos

Differences next project light+

- > 75 tasks (incl. summary tasks and milestones)
- > 3 input levels (incl. project level)
- > 20 project stakeholders

Date Fields

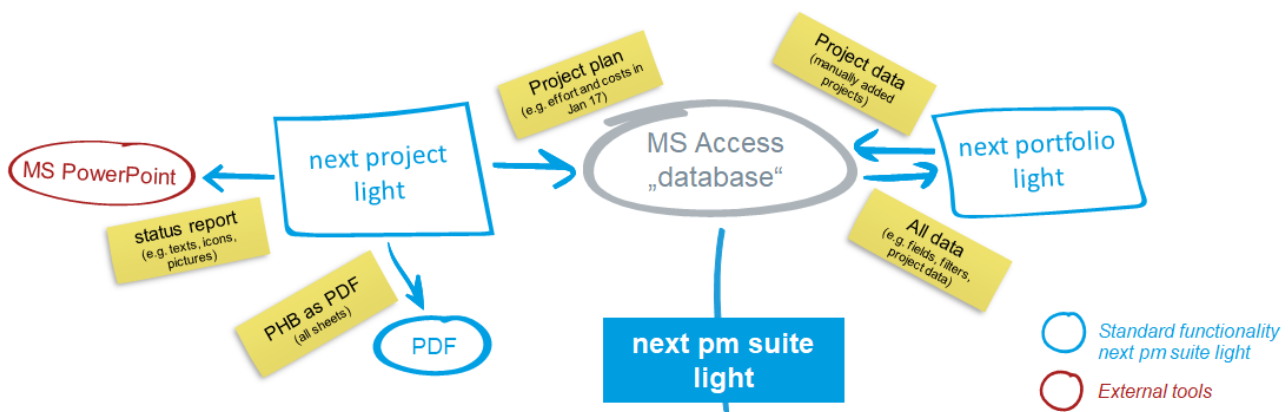
To facilitate entering dates, a calendar appears when you double click in a date cell. This way a date can be selected directly. You may also enter the date manually.



Project Data Exchange with Other Users

next project can be used as a stand-alone tool for project planning and controlling. It is also possible to exchange project data via a defined interface. Since the release of V5.0, next project light can now import/export from/to other MS standard software.

Below you will find an overview of interfaces of the pm suite (combination of next project and next portfolio). The interfaces are described in the respective specification sheets, but some are treated in the last part of this manual.



Interfaces – An Overview		
Name	Category	Description of Application
PDF	Export (file)	All tabs are exported to a PDF file, which can also be read without specific next project light know-how.
MS PowerPoint Status Report Export	Export (application)	Based on a PowerPoint template, predefined texts, icons and graphics are transferred (key contents of the status report). Refer to S1. MS PowerPoint Export, Page 38.
next portfolio light	Export (DB)	With the tool next portfolio light, you can import and consolidate key data of project handbooks (relevant data is exchanged via an SQL statement of the MS Access database of next portfolio light). Refer to S2. next portfolio light Export, Page 40.

For all application interfaces, it is necessary to install the appropriate application client (e.g. MS PowerPoint for PowerPoint exports). For next portfolio light exchanges, the MS Access file for next portfolio light is required.

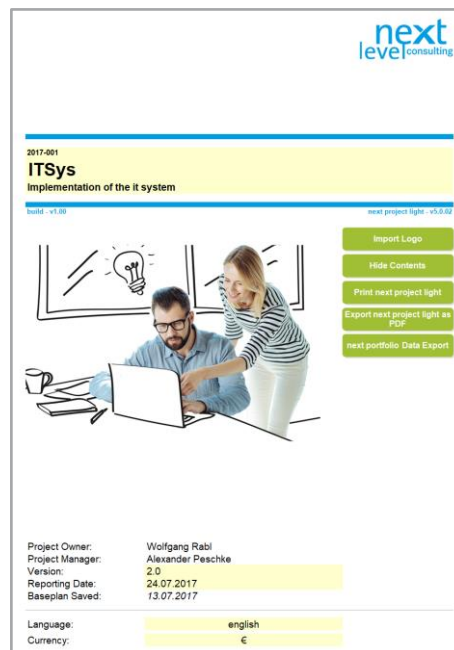
1. Creating a Project

next project light can be considered a template. This template is opened for every new project and saved in a separate file. Technically, the XLSB format is used, which means that the user must save the template manually under a different name (perhaps also in a different location). It is recommended to save the file right after starting the template in a folder with a project-specific name and limit the reading rights to project managers.

The project handbook may then be saved manually or automatically on the data storage.

The “Cover” Tab

Switch to the “Cover” tab and fill in the “Project Code”, “Project Name” and “Full Project Name”. The “Cover” tab also contains information on the “Version” and “Reporting Date”. You can use the “Cover” to categorize the project, import a logo and change the language and currency.



If you want to use next project light in English, you should change the language at the beginning, as editable fields (even drop-downs) are not translated. Also, editable fields that are already in the template, such as full names of dummy-WPs are not translated.

The key fields on the “Cover” tab are explained below:

Fields – Cover Tab		
Name	Description	Technical Relevance
Project Code	A clear project identification number e.g. 2018-001	Any alphanumeric value is allowed. When data from other systems is imported or exported (e.g. when transferring project data to next portfolio light), this value is used as a classification key. This means that this value must be unique across all projects (UID → unique identifier).
Project Name	A project name that is clearly identifiable and easy to remember for all people involved. The project name should be short and meaningful. e.g. IT System	The project name appears on the headers of the other sheets as well as on some graphics (for example, it is displayed in the middle of the graphical project stakeholder analysis).
Full Project Name	An optional extended project identifier and/or short project description to add details about the project content. e.g. Implementation of Computer System XY in Area ABC	Simple text field, without additional links.
Complexity	The fields “Complexity”, “Project Type” and “Project Phase” are not very relevant in next project light; they support clustering projects in project portfolio management. e.g. Project Type: Information Technology	The drop-down fields are defined and have no other consequences on content or calculation.
Project Owner	The name of the project owner.	This field is not editable. The name is taken from the “Assignment” tab.
Project Manager	The name of the project manager.	This field is not editable. The name is taken from the “Assignment” tab.
Version	An identification number which allows you to determine whether the content of a document has been changed. e.g. 1.0	This field can contain any alphanumeric value. There is no logical connection to the change history, the base plan or status report.
Reporting Date	A date which identifies the current status of the project. This is also used as the basis for report date-related functions and calculations. e.g. 17.02.2017	The reporting date is the base for the calculation of the actual dates, the milestones and the progress report. The reporting date is also a central parameter for the automated distribution of scope and costs over time.
Base Plan Saved	The last saving date of the base plan. If there is no value, the base plan has not yet been saved.	This field is not editable. You can save the base plan on the “Data” tab. When saving the base plan, the reporting date will be copied.

The key functions/buttons on the “Cover” tab are explained below:

Functions – Cover Tab		
Button	Description	Technical Details
Import Logo	Insert a project logo on the “Cover” tab	This lets you select a graphic file from a dialog box. The graphic’s display size is reduced. The quality of the graphic is adapted to keep the storage space needed to a minimum. Only “.jpg”, “.bmp”, “.png” and “.gif” files are accepted.
Hide Contents	Highlight the input fields in the whole project handbook	Besides a few exceptions (for layout reasons), the editable fields in the entire project handbook are highlighted yellow or white respectively.
Print next project light	Print the whole project handbook	This marks all sheets and opens the dialog box for printing.
Export next project light as PDF	Save the whole project handbook as a PDF	This marks all sheets and opens the dialog box for saving. It is suggested to save the file as a PDF in the same folder and the same name as the next project light file.
next portfolio Data Export	Update project data in next portfolio light	Only available with active next portfolio interface! This updates or newly generates the project in the next portfolio light database. Manually changed values in next portfolio light may be overwritten. If there has not been a connection to the MS Access data base, you must choose the MS Access data base file. More information on the next portfolio light interface can be found in section S2. next portfolio light Export, page 40.

2. Project Boundaries and Stakeholder Analysis

There are two worksheets involved with the project boundaries and stakeholder analysis. While the “Project Stakeholder Analysis” can be used separately, the “Project Assignment” is largely consolidated in the project detailed planning.

In the “Project Assignment” you can find the temporal, content-based, and social boundaries. In the “Project Stakeholder Analysis” the social context is analysed and documented.

The “Assignment” Tab

Switch to the “Assignment” tab. The project assignment is a form in which individual fields can be manually edited and other values from the current plan can be transferred.

The screenshot shows the 'Project Assignment' form with the following sections:

- Get Detail Data** (button)
- Project Assignment** (title)
- ITSys** (text)
- Start Event:** lock-off meeting started | **Start Date:** 03.07.2017
- End Event:** IT system approved | **End Date:** 14.03.2018
- Objectives:**
 - 1 the X system meets the technical and legal requirements
 - 2 users are able to use the IT system (practically and technically)
 - 3 cost reduction of the supported process by 100.000€ until the end of 2018
- Non-Objectives:**
 - 1 complete exchange of the existing IT system
 - 2 realization of interfaces to the X system abroad the enterprise borders (to suppliers and customers)
- Critical Factors for Success and Main Risks:** (empty field)
- Main Tasks:**

Description	Date	Cost Types	Efforts (md)	Costs (€)
PROJECT MANAGEMENT	14.03.18	Internal personnel costs	504.0	258.000
ANALYSE AND DECISION	24.08.17	External personnel costs	10.0	12.000
DETAIL PLANNING	03.10.17	Third-party costs	—	10.000
IMPLEMENTATION	11.01.18	SUM	514.0	280.000
TEST AND TRAINING	07.03.18	—	—	—
LAUNCH	14.03.18	* Cost Rate	1.000	€ per md
- Resources / Costs:** (table as above)
- Project Owner:** Wolfgang Rahl, Headquarter
- Project Manager:** Alexander Peschke, Headquarter
- Fit Team:**
 - Michael Gutschmidt: IT department
 - Sylwia Ganczy: IT department
 - Marlene Todenew: Technology
 - Stefan Hüb: Human resources
 - Pal Dozary: Headquarter

Fields and Functions

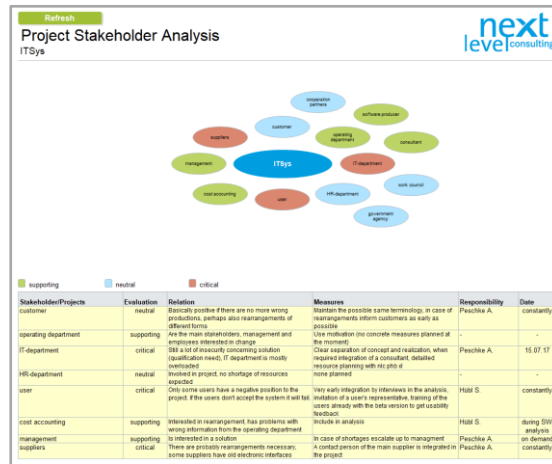
Name	Description	Technical Relevance
Start and End Event	Description of the scheduled start and end events that provide a timescale definition of the project.	Editable alphanumeric values; where required, the relevant milestones must be entered once again manually in the detailed planning.
Start and End Date	Dates for the scheduled start and end events which provide a timescale definition of the project.	The dates indicate the earliest and latest dates in the project. If necessary, they can be taken from the basic plan (the detailed planning). Alphanumeric values are also allowed.
Objectives and Non-Objectives	Description of measurable objectives to objectively define the project.	Five rows are displayed by default; more lines appear automatically when editing. The objectives and non-objectives are limited to a maximum of 10 alphanumeric values.
Critical Success Factors and Key Risks	Description of critical success factors and key risks.	See “Objectives and Non-Objectives”

Main Tasks	Description of the central steps needed to achieve the project objectives.	Editable alphanumeric values. If necessary, they can be taken from the current planning (task names of the 2 nd level of the detailed planning and their current end dates).
Resources / Costs	Overview of the scope and costs for the project, broken down by cost type.	The names are freely editable, or selectable from a drop-down list that shows resource and cost types saved in the master data. Scope and costs are positive numeric values. The values can also be taken from the current planning and represent the total effort and costs for the centrally defined cost types.
Cost Rate	Cost rate (in €/md) multiplied by efforts, essential for calculating personnel costs.	Positive value. The automatic cost type "Personnel Costs" is calculated in the "Data" tab. Efforts per WP x cost rate
Project Owner, Manager, PM Team	Overview of the central roles in the project organisation with assigned company/organisational unit.	Editable alphanumeric values which are the base for "Responsibility" drop-down lists. Use short names (e.g. Huber A.) otherwise the person responsible for a WP will be cropped in the WBS.
Signatures	Space for the project manager and project owner to formally sign the project.	The signature field is editable to be able to include how and when the assignment was signed off in electronic manner. Normally, the field should remain blank, and be signed physically as a hard copy.
Get Detail Data	Current main tasks, current values of dates and resources/costs, as well as current people from the organisation can be transferred into the project assignment.	Values that are already filled-in are overwritten. Transferred values can later be further edited.

Fields/areas that are marked with "*" are filled with data from the detailed planning via the "Get Detail Data" button (e.g. the earliest date in the "Data" sheet will be transferred as the start date).

The “Stakeholder” Tab

Switch to the “Stakeholder” tab. The project stakeholder analysis comprises a manually editable table and a graphical representation of the project stakeholders. By clicking the button, the graphics are refreshed as well as three empty lines displayed. You can indicate up to 8 (or 20 in next project light) project stakeholders.



In the following table, the project stakeholder analysis is explained in further detail:

Field Descriptions		
Name	Description	Technical Relevance
Stakeholder/ Projects	Names of the relevant stakeholders (and projects respectively, in case the factual context will be analysed here too).	Editable alphanumeric value. This name is also displayed in the graphic and should be short and meaningful. In general, social environments are added here, technically also objective context may be added.
Evaluation	Evaluation of the relationship in case of call for action due to critical environment.	Drop-down list with possible values “Supporting”, “Neutral” and “Critical”. In correspondence to the evaluation, the stakeholders are colour-differentiated in the graphic.
Relation	Description of the influence the stakeholder has on the project.	Editable alphanumeric value.
Measures	Description of measures in order to use potentials and avoid conflicts.	Editable alphanumeric value. No technical connection to WPs or to dos.
Responsibility	Allocation of responsibility to a defined measure.	Drop-down list consisting of persons entered in the project assignment. Additionally, resources not included in the assignment may be entered manually.

Generally, the stakeholder analysis is merely supposed to analyse the social context. For users, the factual context may also be represented here. Therefore, the name “Stakeholder/Projects” is used.

3. Detailed Planning

The “Data” Tab

Switch to the “Data” tab. This worksheet contains all the important project data. On the one hand, it contains a wide range of detailed information which is not usually printed out. On the other hand, it forms the basis for a range of automatically generated worksheets. This worksheet contains the most features and is the least self-explanatory. It is, therefore, important that you read this section before working with the PM tool.

In short, the sheet deals with “Tasks”, one task occupying a row. A task can be a WP, as well as a summary task or a milestone. The different terms and their technical interrelationships are explained below. The columns contain the relevant detailed information on the individual tasks, the editable fields are calculated or imported, depending on the type of task. Their contents can range from performance planning to cost controlling.

Terms for Activities and Tasks Used in next project light

Name	Description	Technical Details
Task	The term “task” is a neutral description of the cells of the “Data” sheet (MS Project also uses the term “task”).	Every cell in the “Data” sheet contains information about a task. This is the base for graphically creating the WBS or generating available WBS-codes for drop-down lists and others.
Type of Task	next project differentiates between 4 different task types: project (first row), work package (the respective lowest level of a “WBS-leaf”), milestone and summary task (with a minimum of one WP).	The task type controls both the input method as well as its display in the different PM methods. The different task types thus allow different entry methods, calculations or node displays (=boxes) within the WBS.
Work Package	A WP is usually the smallest package in the overall performance planning for the project team.	next project light normally uses WPs as its foundation (usually level 3). Planning and editing is done at this level.

Milestone	A milestone is not an event, but rather provides a time-line definition of a critical event (as the PM software is set up in such a way that these events are included in performance planning, milestones are also a type of task).	Milestones are defined by hitting a button. Generally, very little information is embedded in a milestone, as it only defines a deadline and has no effort allocated to it. Only a WP can be changed to become a milestone.
Summary Task	As its name suggests, a summary task “summarizes” a range of detailed tasks (regardless of whether these are summary tasks, WPs or milestones).	Besides editable fields, summary tasks mostly comprise calculated fields. The “vertical” calculation of the underlying tasks is performed by clicking the appropriate navigation button. A summary task (usually level 2) would therefore, for example, calculate the sum of the effort for the underlying tasks.
Project	A project is basically the highest form of summary task.	In terms of the system, the project is characterized in that at its highest level (level 1), it only provides a single task as well as some specific relationships with other worksheets (such as the “Cover” for the project name and project manager, and the “Status” or the status traffic lights).
Phase	The tasks on level 2 are usually defined as phases if the project is structured in a process-oriented manner.	In a technical sense, phases do not exist. In some analyses, however, a consolidated calculation is performed and displayed on the phase- and project level (for example, for distributing effort by phase).
Main Task	This is simply another term for phase and is used for the content boundaries.	This term is used in the project assignment and these are specifically the level 2 task descriptions transferred from the “Data” when clicking the “Get detail data” button.
Measures	In practice, this term is used in various ways. In next project light, this term is more often used to refer to less structured tasks such as measures for the project stakeholder analysis.	In next project light measures are mostly free text fields which can be filled out manually. It is up to the user to decide whether to transfer the text measures into structured tasks or to dos.
To Do	A to do in next project light is a very operational task, categorized under a WP, and should be included, to control the task (for example, booking a conference room for the following week).	To dos are managed centrally on a single worksheet and can be assigned to a WP by WBS-code.
Work Package Specification	If required, WPs can get detailed descriptions. The “WP Content” defines the further operationalization of these tasks.	Only in next project light+ every WP can be appropriately specified. Every WP has always precisely one associated WP specification which is subdivided into WP contents, WP results and progress measuring.
Remaining Tasks	The “Close-Down Report” in next project light also uses the term “Remaining Tasks”, to define tasks which are still part of the project, but for which it makes no sense to maintain a temporary organisation.	The remaining tasks in the “Close-Down Report” are freely editable, but it is also possible to transfer existing open WPs to the “Close-Down Report” with the click of a button.

If necessary, a navigation bar can be displayed by clicking the “Navigation” button. The navigation bar is part of next project light and can be freely positioned on the worksheet; when switching worksheets, the navigation bar disappears.



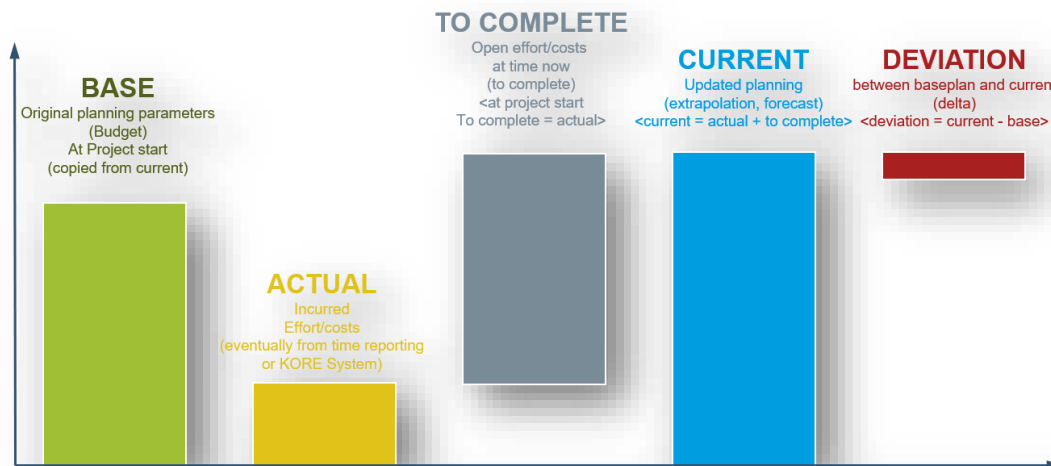
Before explaining the functions of the navigation bar, find an overview of all the fields (columns) in the “Data” sheet below. Effort and costs are each divided into resource and cost types.

Field Descriptions (Columns) of the “Data” Sheet			
Name	Field Type	Field Description	Example
No.	Fixed, integer	A serial number which is automatically generated and is unique to a single point in time. Underlying tasks that are hidden have coloured numbers.	5
WBS-Code	Fixed, text	Fixed defined code system which separates levels by a period “.” and generates continuous numbers within each level.	1.2.1
Description	Free, text	Freely editable field for the task name (WP, summary task, milestone). The name of the task should be short and meaningful so that the text is still fully displayed in the WBS.	Perform Actual Status Analysis
Progress	Drop-down, percentage	Progress of the task which can range from 0% to 100% in 25%-steps; in summary tasks, the average value of the directly underlying sub-tasks is calculated (all tasks have equal weighting; milestones are not considered in the calculation).	25%
Status	Drop-down, text	Displays the status of the task in traffic light colours to show problems and/or need for support. Drop-down list: green, yellow, red	green
Responsibility	Drop-down, text	Name(s) of the resource(s) responsible for each task. The drop-down based on the names given in project assignment.	Peschke A.
Base Start Date	Locked, date	Scheduled start date for the task; the base plan is copied from the current plan by a system function.	03.07.17
Base End Date	Locked, date	Scheduled end date for the task, see also “Base Start Date”.	14.03.18
Current Start Date	Free, date	Freely editable date for the current start of the task. Double click opens a calendar form for optional use.	03.07.17
Current End Date	Free, date	Freely editable date for the current end of the task. Double click opens a calendar form for optional use.	23.03.18
Duration	Free, positive number	Shows the duration of a WP. The duration is taken from the current start and end dates.	5
Resources Base	Locked, positive number	Scheduled effort (in man-days) for the task; the base plan is copied from the current plan with a system function.	10,0
Resources Actual	Free, positive number	Freely editable effort (in man-days) of the tasks that have already occurred.	5,0
Resources Current	Free, positive number	Freely editable current scheduled effort on the task (in man-days). This plan should be adjusted periodically in accordance with the current understanding of the situation of the project team.	12,0
Costs Base	Locked, positive number	Scheduled costs (e.g. in €) for the task, such as in expenses.	2.000
Costs Actual	Free or locked positive number	Freely editable costs already incurred (e.g. in €) for the task, such as in expenses. The automatic cost type “personnel cost” is calculated	1.000

		based on the actual effort and the cost rate on assignment.	
Costs Current	Free or locked positive number	Freely editable costs already incurred (e.g. in €) for the task, such as in expenses. The automatic cost type "personnel cost" is calculated based on the actual effort and the cost rate on assignment.	1.800
Comment	Free, text	Freely editable field for short comments, an optional field for use as required.	Verify costs with RW

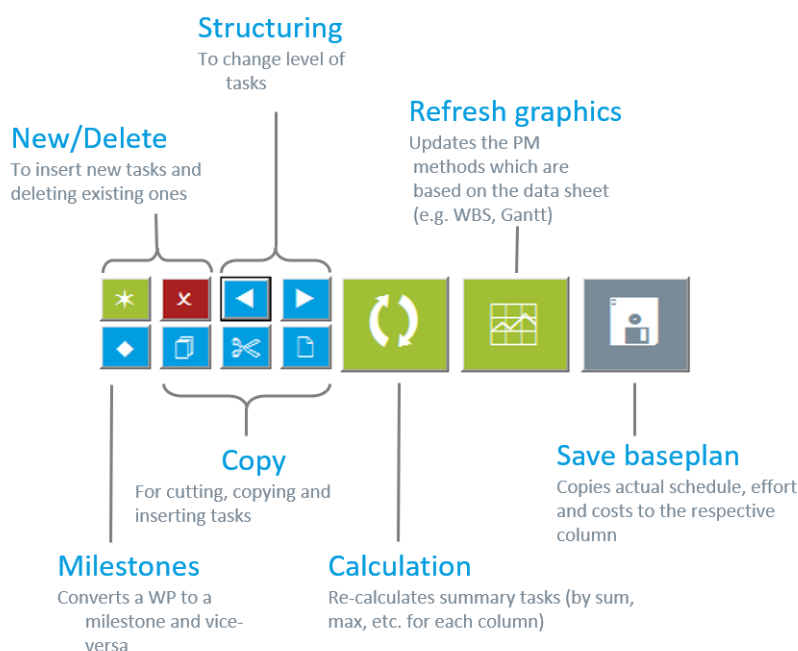
In "Responsibility" next project light only offers names used in the project assignment. If a specific name is chosen and deleted or adapted in the project assignment afterwards, this name is not automatically changed or deleted in the data sheet.

Because effort and costs generally raise the highest number of questions, the five categories are once again displayed graphically here. Different applications might also use different terms for the very same values.








Basic Functions of the Navigation Bar

The following graphic shows the navigation bar with an overview of the buttons and the associated functions, their uses are then explained in detail. The buttons on the navigation bar also have functional descriptions in the PM tool.



The navigation bar is divided into two groups in terms of its functionality. They comprise basic functions required in the first steps of project planning and processing functions for altering the existing structure.




Basic Functions (of the Navigation Bar on the “Data” Sheet)			
Icon	Function	Description	Restrictions
	Insert One or More Tasks	Inserts a new row above the currently selected cell at the level of the task above it. When several consecutive cells are selected, the same number of cells is inserted above the selected cells.	No separate areas must be selected. A task can only be inserted below the “Project” row and above the “END” row. If the insertion exceeds the maximum number of tasks, the entire action is cancelled.
	Delete One or More Tasks	Deletes the row of a selected cell. When a summary task is selected, its sub-tasks are also automatically deleted. When several consecutive cells are selected, the deleting process must be confirmed after which all selected tasks (as well as their associated sub-tasks) are permanently deleted.	No separate areas must be selected. A task can only be deleted below the project row and above the “END” row.
	Set Milestone	By clicking, a task is converted from the lowest level (WP) to a milestone, and/or a milestone can be converted back again to a WP. The field limitations and cell layout change accordingly.	Only a task can be converted to a milestone (no summary task). Every milestone must be converted individually.

	Classify Task(s) at Lower Level	The selected tasks are classified one level lower. If several tasks comprising different levels are selected; all sub-tasks are automatically classified as a summary task.	No separate areas must be selected. Nothing should be classified below the defined level limit and this classification should not create “gaps” in the levels (e.g. level 2 should be classified as level 3, meaning that level 1 would be directly followed by level 3).
	Classify Task(s) at Higher Level	The selected tasks are classified one level higher. If several tasks comprising different levels are selected, all sub-tasks are automatically classified as a summary task.	No separate areas must be selected. They must not be classified as project-level tasks. In imported areas, no imported task may be raised to the level of the Import Master task.
	Calculate	This will re-start the calculations for all summary tasks (at all levels).	In general, buttons cannot be clicked when a cell is still being edited. There are no further restrictions.
	Refresh Graphics	Built on data structure-based methods.	Click this button to update the WBS or Gantt chart (the linear allocation of effort and costs as well as the function diagram are re-calculated.)
	Save Base Plan	Make a copy of the current plan value, which will be visualized in reports and Gantt.	“Saving” here means that the current data (the current deadlines, current effort, current costs) are copied to an appropriate plan column (base deadlines, base effort and base costs). Resources and costs here include all resource and cost types. Furthermore, the date of saving the base plan is saved (visible on the cover).

Setting milestones and raising/lowering the task classifications automatically creates summary tasks. These different task types have consequences on the functionality as well as on the layout of these tasks, the data sheet, WBS and Gantt.

Changes may be required as early as the planning stage; primarily in project controlling, where adaptations to the project data may be required, tasks may need to be expanded, removed, and/or moved or copied. The following section deals with these changes and provides further descriptions of the data input process.

Basically, all data in fields that is also editable can be changed. To do this, simply select the relevant cell and overwrite, adapt or add to the existing content. You should note, however, that summary tasks are not constantly re-calculated. They are re-calculated after complex actions such as sub-divisions. This process can also be started by clicking the “Re-Calculate Summary Tasks” button.

Editing Functions (of the Navigation Bar on the “Data” Sheet)			
Icon	Function	Description	Restrictions
	Copying Content	Transfers the rows of selected cells to the next project light clipboard; they remain in the “Data” sheet.	If several tasks are selected comprising different levels, all sub-tasks of the summary task are also copied.
	Cutting Content	Transfers the rows of selected cells to the next project clipboard and removes them from the “Data” sheet. If several tasks are selected comprising different levels, all sub-tasks of the summary task are also cut.	Tasks which cannot be deleted cannot be cut either (e.g. Level 1 project task).
	Pasting Content	Inserts the appropriate number of new tasks above the row of the selected cell; they are then filled with the content of the next project clipboard. As part of this process, the structure of the clipboard is shifted based on the tasks above, including levels. If the content of the clipboard is copied, it can be inserted several times; if it is cut, the clipboard is emptied after a single insertion.	Only one task may be selected. Content can only be inserted below the project row and above the “END” row. If the insertion exceeds the maximum number of tasks, the entire action is cancelled. The content of the clipboard cannot be inserted into an import area.

Keep in mind that the function of the next project light clipboard differs from the classic one of MS Excel or the operating system. When copying values, the task is copied with all its related information.

During insertion, content changes in structure and format take place. Depending on the number of tasks, this may take significantly longer than a simple copy and paste.

4. Scope Planning

Only the next project light+ supports the work package specification method, the focus, however, is on the WBS. As stated before, every task must be entered and structured.

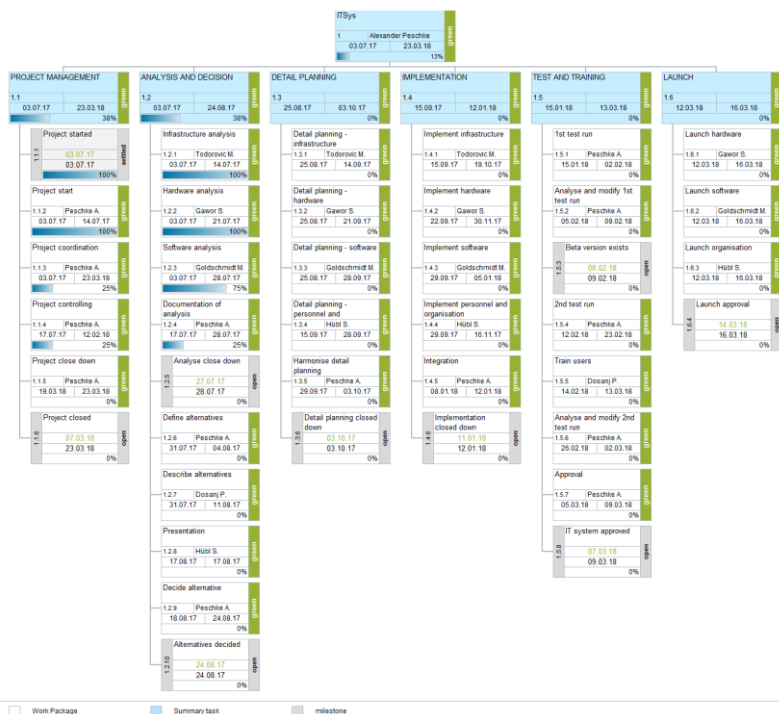
The WBS can be generated at any time, it must be triggered manually. Depending on the number of tasks, this process can take up to a few minutes.

The “WBS” Tab

The WBS is updated by clicking the “Refresh Graphics” button of the navigation bar on the data sheet or the “Refresh” button in the upper left corner of the WBS sheet.



Normally, the tasks are divided into task types differentiated by design (project, summary task, WP, milestone). The design can vary in terms of its format, field contents, colours and fonts.



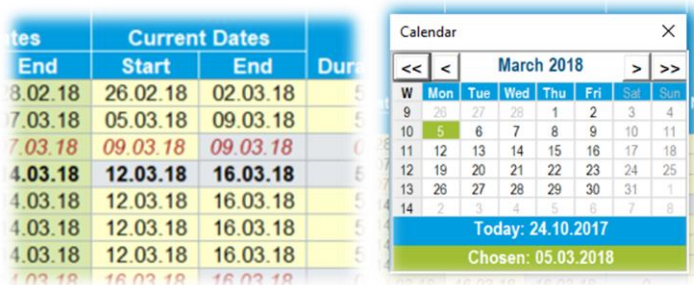
next project light offers only one predefined layout, which cannot be edited by the user. The layout defines how many levels of the WBS are displayed, what size the nodes are (how many elements the grid needs), how much node content is displayed and what the node layout and the content of the legend look like in detail. Furthermore, the design is defined by the progress (open, started, closed).

Nodes – An Overview			
Type	Progress 0%	Progress 1 – 99 %	Progress 100%
Project			
Summary Task			
Work Package			
Milestone			
General Information	Remaining demand: 11 horizontal cells, 10 vertical cells Restrictions: 3 levels, 30 phases		

5. Simple Scheduling

Once the project structure is entered in the “Data” sheet and dates have been partially assigned, milestone plans, and Gantt charts can be created and updated. Dates can be simply entered in the “Data” sheet. The tool does not identify weekends or public holidays.

The column “Duration” shows the days it takes for the task to be finished, milestones always have a duration of 0 days. You can set start and end dates from a calendar by double-clicking the field.



Milestones and Gantt-Charts are not refreshed after every entry in the “Data” tab, in fact they must be triggered manually (e.g. by clicking the button “Refresh Graphics” on the navigation bar). Depending on the number of tasks, this process may take up to a few minutes.

The “Milestones” Tab

Milestones are defined in the “Data” sheet (see setting milestones under 3. Detailed Planning, page 15). The milestone plan comprises all tasks that are defined as milestones, sorted by their current deadline. When the milestone is completed, the current dates are transferred to the column “actual dates” (progress = 100%).

The screenshot shows a window titled 'Project Milestone Plan' with a 'Refresh' button and the 'next level consulting' logo. Below is a table with the following data:

WBS Code	Milestone Description	Base Dates	Current Dates	Actual Dates
1.1.1	Project started	03.07.17	03.07.17	03.07.17
1.2.5	Analyse close down	27.07.17	28.07.17	
1.2.10	Alternatives decided	24.08.17	24.08.17	
1.3.6	Detail planning closed down	03.10.17	03.10.17	
1.4.6	Implementation closed down	11.01.18	12.01.18	
1.5.3	Beta version exists	08.02.18	09.02.18	
1.5.8	IT system approved	07.03.18	09.03.18	
1.6.4	Launch approval	14.03.18	16.03.18	
1.1.6	Project closed	07.03.18	23.03.18	

The milestone plan can be updated directly on the “Milestones” sheet using the “Refresh” button, or by clicking the “Refresh Graphics” on the navigation bar on the “Data” sheet.

6. Resource and Cost Planning

Once the project structure is entered in the “Data” sheet and effort and costs have at least been partially assigned, the resource and cost schedule can be created and/or refreshed. The resource and cost schedules are not refreshed after every new entry in the “Data” sheet; instead, they must be manually triggered. Depending on the number of tasks, this process can take up to a few minutes.

The “Data” Tab

The definition of rows and columns in the “Data” tab has been explained before in the detailed planning (see also The “Data” Tab under 3. Detailed Planning, page 15).

Plan the effort for the project in md on the lowest level (WPs, level 3) in the column “Current” underneath of “Resources” and “Personnel”. next project light does not differentiate between more than one type of resources (e.g. between departments or cost rates).

No.	WBS Code	Description	Progress	Status	Responsibility	Dates		Resources (md)			Personnel Costs			Other Costs			SUM		Comment			
						Base Dates	Current Dates	Base	Actual	Current	Base	Actual	Current	Base	Actual	Current	Base	Actual		Current		
1	1.1	1.1 Sys	1%	green	Alexander Peschke	03.07.17	14.03.18	03.07.17	23.03.18	264	295.0	34.0	299.0	205.500	36.000	299.500	19.000	750	12.000	308.200	36.750	392.900
2	1.1	PROJECT MANAGEMENT	38%	green		03.07.17	07.03.18	03.07.17	23.03.18	264	12.0	5.0	11.0	24.500	5.000	11.800	750	750	750	27.750	5.750	11.750
3	1.1.1	Project started	100%	green		03.07.17	03.07.17	03.07.17	03.07.17	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1.1.2	Project start	100%	green	Peschke A.	03.07.17	13.07.17	03.07.17	14.07.17	12	5.0	4.0	4.0	7.000	4.000	4.000	750	750	750	8.750	4.750	4.750
5	1.1.3	Project coordination	25%	green	Peschke A.	03.07.17	07.03.18	03.07.17	23.03.18	264	0	0	0	2.000	0	0	0	0	0	2.000	0	0
6	1.1.4	Project controlling	25%	green	Peschke A.	27.07.17	25.02.18	17.07.17	12.02.18	211	5.0	1.0	5.0	11.500	1.000	5.000	0	0	0	11.500	1.000	5.000
7	1.1.5	Project close down	0%	green	Peschke A.	03.03.18	07.03.18	19.03.18	23.03.18	5	2.0	0	2.0	4.000	0	2.000	0	0	0	2.000	0	2.000
8	1.1.6	Project closed	0%	green		07.03.18	07.03.18	23.03.18	23.03.18	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1.2	ANALYSIS AND DECISION	38%	green		03.07.17	24.08.17	03.07.17	24.08.17	53	33.0	31.0	36.0	28.500	31.000	36.000	0	0	0	28.700	31.000	36.000
10	1.2.1	Infrastructure analysis	100%	green	Todorovic M.	03.07.17	13.07.17	03.07.17	14.07.17	12	0	0	0	4.000	0	0	0	0	0	4.000	0	0
11	1.2.2	Hardware analysis	100%	green	Gawor S.	03.07.17	20.07.17	03.07.17	21.07.17	19	10.0	10.0	10.0	5.000	10.000	10.000	0	0	0	5.000	10.000	10.000
12	1.2.3	Software analysis	75%	green	Goldschmidt M.	03.07.17	27.07.17	03.07.17	28.07.17	26	20.0	20.0	22.0	11.000	20.000	22.000	0	0	0	11.000	20.000	22.000
13	1.2.4	Documentation of analysis	25%	green	Peschke A.	20.07.17	27.07.17	17.07.17	28.07.17	12	1.0	1.0	2.0	3.500	2.000	1.000	0	0	0	3.500	1.000	2.000
14	1.2.5	Analyze close down	0%	green		27.07.17	27.07.17	28.07.17	28.07.17	0	0	0	0	0	0	0	0	0	0	0	0	0
15	1.2.6	Delete alternatives	0%	green	Peschke A.	30.07.17	03.08.17	31.07.17	04.08.17	5	1.0	1.0	1.0	1.500	0	1.000	0	0	0	1.500	0	1.000
16	1.2.7	Describe alternatives	0%	green	Dossanj P.	06.08.17	10.08.17	31.07.17	11.08.17	12	0	0	0	1.500	0	0	0	0	0	1.500	0	0
17	1.2.8	Presentation	0%	green	Hald S.	13.08.17	17.08.17	17.08.17	17.08.17	1	1.0	1.0	1.0	1.500	0	1.000	0	0	0	1.500	0	1.000
18	1.2.9	Decide alternative	0%	green	Peschke A.	20.08.17	24.08.17	18.08.17	24.08.17	7	0	0	0	500	0	0	0	0	0	500	0	0
19	1.2.10	Alternatives decided	0%	green		24.08.17	24.08.17	24.08.17	24.08.17	0	0	0	0	0	0	0	0	0	0	0	0	0
20	1.3	DETAIL PLANNING	0%	green		27.08.17	03.10.17	25.08.17	03.10.17	40	57.0	0.0	62.0	47.000	0	62.000	2.500	0	4.500	51.500	0	66.500
21	1.3.1	Detail planning - infrastructure	0%	green	Todorovic M.	27.08.17	21.09.17	25.08.17	14.09.17	21	0	0	0	6.500	0	0	0	0	0	6.500	0	0
22	1.3.2	Detail planning - hardware	0%	green	Gawor S.	27.08.17	14.09.17	25.08.17	21.09.17	28	25.0	0	25.0	12.500	0	25.000	1.500	0	1.500	14.000	0	26.500
23	1.3.3	Detail planning - software	0%	green	Goldschmidt M.	27.08.17	28.09.17	25.08.17	28.09.17	35	30.0	0	35.0	17.500	0	35.000	1.000	0	3.000	18.500	0	38.000
24	1.3.4	Detail planning - personnel and communication	0%	green	Hald S.	27.08.17	27.09.17	16.08.17	20.09.17	14	0	0	0	7.000	0	0	0	0	0	7.000	0	0

By clicking the button “Calculate Summary Tasks” on the navigation bar, the summary tasks will be added up. After the project planning, the current efforts will be copied to the base efforts.

next project light offers two cost types. One automatic calculated cost type “Personnel Costs”, which comprises the effort of the work package and the cost rate from the project assignment and one manual cost type “Other Costs” which is to be filled in manually.

As with the resources, planned costs will be inserted in the column “Current” of “Other Costs”. The summary tasks will, again, be calculated with the button and the base values will be copied in the project controlling from the current costs. As with the resources, the two cost types will be added up.

Tab “Personnel-Costs”

In this tab, a report of different graphical evaluations and tabulations based on the detail planning is created. The tables differentiate between simple consolidated values on project or phase level and a distribution of the current values over time. The reports will be generated by clicking the button “Refresh” or “Refresh Graphics” in the navigation bar on the “Data” sheet.



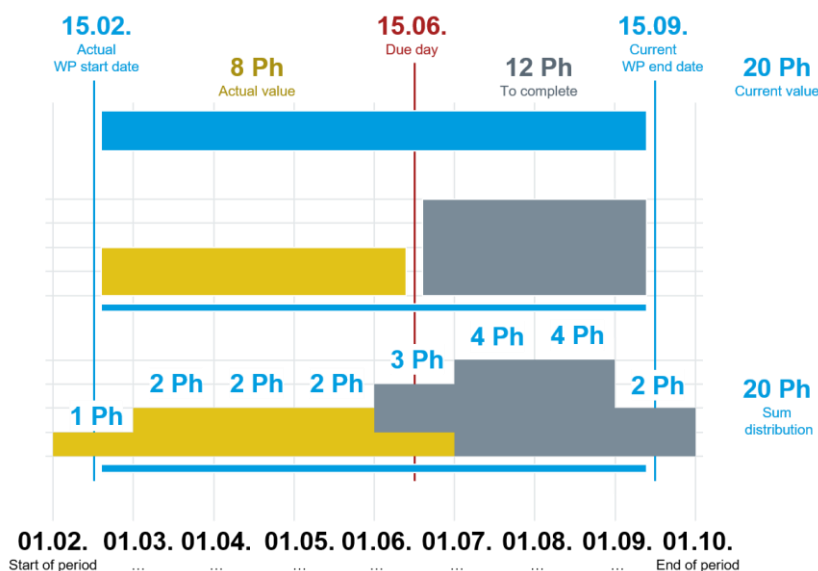
The resource overview shows the consolidated efforts, and the cost overview shows the consolidated costs of the whole project in effort and cost categories (see also 3. Detailed Planning, page 15). The resource and cost distribution show an automatically linear distribution of efforts and costs broken down in months.

Calculating the Resource and Cost Breakdown

The breakdown of resources and costs does not have to be manually edited in next project light, as it is automatically broken down in a graph; however, the breakdown is only an approximation procedure that in practice can help with identifying resource peaks and/or with the annual capping of costs as well as with identifying liquidity bottlenecks.

The calculation is triggered by refreshing the graphics. The time it takes to perform the breakdown is, of course, dependent on the number of WPs, as well as the number of values included in the resource and cost types.

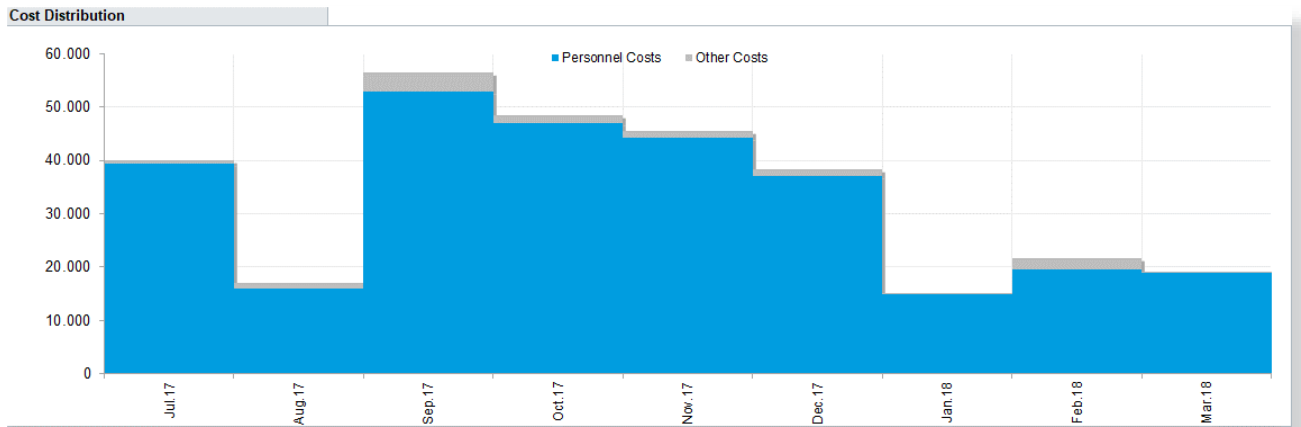
The calculation is performed at the task level (specifically, WPs) and at the daily level by resource and/or cost type. The calculated values are then immediately consolidated for the overall project and months.



It is crucial for resource and cost distribution that only current values are spread out, with “actual” and “to complete” values being displayed separately. Actual values are spread out from the WP start until the reporting date, while to complete values are spread out from the reporting date until the WP end.

To obtain a meaningful breakdown of resources and costs, you must therefore ensure that current start and end dates and current effort and/or costs are stated for all WPs. Furthermore, these values must also be consistent (for example, if a task only begins in two months’ time but its actual effort is included, next project will be unable to resolve these illogical conflicts).

The graphical breakdown does not differentiate between actual and to complete values. It only colours in different resource and/or cost types. The breakdown is only displayed as a graphic, not as a table.



When interpreting the graph, one should always carefully consider the underlying calculation logic. As the cost breakdown corresponds to a linear performance level, it does not have to add up to financial reporting or payments as part of an accountancy system. The definition of the annual budget or any identified liquidity bottleneck must therefore be checked accordingly.

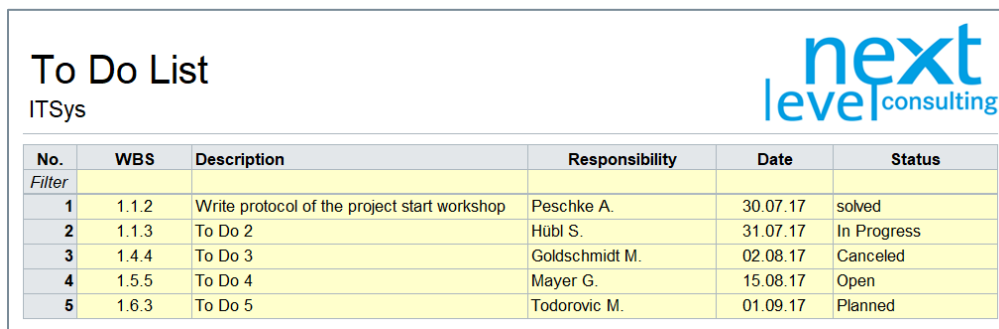
next project light shows no capacity limit, a consolidation of efforts is only possible with next portfolio light.

7. Project Coordination

next project light only supports operative to do planning and tracking.

The “To Dos” Tab

Switch to the “To Dos” tab. The to dos on the sheet are basically managed independently from the other sheets that contain operational measures and to dos. The row height is adjusted to the content of the cells.



No.	WBS	Description	Responsibility	Date	Status
<i>Filter</i>					
1	1.1.2	Write protocol of the project start workshop	Peschke A.	30.07.17	solved
2	1.1.3	To Do 2	Hübl S.	31.07.17	In Progress
3	1.4.4	To Do 3	Goldschmidt M.	02.08.17	Canceled
4	1.5.5	To Do 4	Mayer G.	15.08.17	Open
5	1.6.3	To Do 5	Todorovic M.	01.09.17	Planned

The following table provides a detailed explanation of the individual columns of the to do list.

To Do List – Fields			
Name	Type	Description	Technical Details
No.	Fixed, continuous number	A fixed, defined continuous number which uniquely identifies the to do.	The number cannot be manually edited.
WBS	Restricted, text	Project-accompanying tasks should be a subset of all performance planning (WBS) and thus be assignable to a WP.	A drop-down list with all currently available WBS-codes for the project.
Description	Free, text	Name or detailed description of the task to be performed.	Free text entry and thus the only field which cannot subsequently be meaningfully sorted or filtered.
Responsibility	Free, text	The person who is responsible for implementing and completing the to do.	This is provided by a drop-down list comprising all the people in the project assignment. You can also enter other names.
Date	Free, date	The date the to do should be completed by.	Limited to one free date (which must be within the project duration).
Status	Free, drop-down	Information on the progress of the to do (e.g. in progress, solved and others)	Selection of the value by a pre-defined drop-down list. Especially relevant for filtering with the “X” button

If you want to dos to be listed centrally, a to do created with another method (such as in the status report) must be manually inserted once again in this sheet.

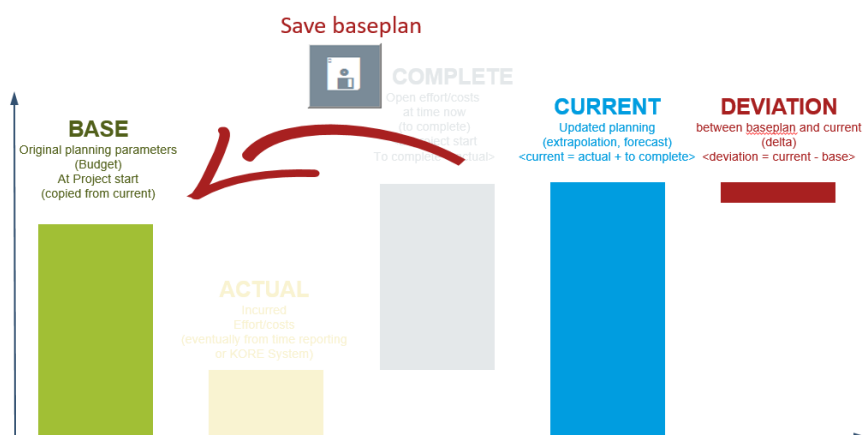
To Do List – Functions		
Button	Function	Description
A	Show All	All completed rows as well as three more empty rows to a maximum of 250 to dos are displayed.
X	Hide Cancelled and Solved	All completed rows as well as three more empty rows to a maximum of 250 to dos are displayed and sorted according to date.
S	Sort (Selected Column)	The rows are sorted in ascending order according to the positioned column. This sorting is applied to the already sorted and filtered area.
F	Filter (Selected Column)	Entering or selecting a value in the column header section will display only those rows that exactly match the filter value. The filter is performed on all areas that are already filtered and sorted.

8. Project Controlling

All forms, masks and buttons have now been explained. This section provides another overview of the project controlling processes in next project light and of the central functions that are applied in the project controlling and the project close-down (such as status report, close-down report).

Base Plan

The initial planning and the on-going new planning are all performed in “Current Plan”. Once the plan has been accepted by the project owner, this planning status should be saved as the base plan. Base plan data is normally displayed in green in next project light (cell background, bar colouring).



The base plan is a reference that acts as a guide on what was agreed on at the start of the project, how the planning deviates from the current situation, and to initiate controlling measures for the project owner as well as the project manager.

The first scheduling and updates are always done in the “current” fields (date, resources, costs). By clicking the button “Save Base Plan” all actual values are copied to the base values, which makes the base and current plan identical. Details for saving a base plan can be found in 3. Detailed Planning, page 15.

Change requests are not integrated in next project light, but it is possible to generate base values for all planning categories (dates, resources, costs) at the same time. The base values may be saved more than once.

Unlike the current plan, summary tasks are not calculated based on their subtasks. If a task is removed, the base plan of this task is removed as well. That way, the base plan of the summary tasks and the project tasks are unaffected when deleted and restructured.

The base plan is never edited manually. It is always a copy of the current plan at the time the user hits the “Save Base Plan” button.

Update Planning

The project controlling process is very similar to the initial planning process. All plans are adjusted based on the current status. Many methods therefore simply add further values (for example, adding project stakeholders) or update information (for example, assessing project stakeholders).

In terms of dates, resources and costs there are various ways of saving a base plan and to then visualize changes from the current plan to the base plan (e.g. dates as milestone plan or Gantt-chart).

For resources and costs there is an additional differentiation between current and future efforts (actual and to complete). The tasks may be enhanced with progress reports and a status traffic light (see 3. Detailed Planning, page 15).

No.	WBS Code	Description	Progress	Status	Responsibility	Dates				Resources (md)			Costs (€)				Comment						
						Base Dates		Current Dates		Personnel	Personnel Costs		Other Costs		SUM								
						Start	End	Start	End		Base	Actual	Current	Base		Actual		Current					
1	1.1	1.1 IT Sys	13%	green	Alexander Peschke	03.07.17	14.03.18	03.07.17	23.03.18	264	265,0	36,0	298,0	258.500	36.000	298.000	18.000	750	12.000	308.200	36.750	302.000	
2	1.1.1	PROJECT MANAGEMENT	38%	green		03.07.17	01.03.18	03.07.17	23.03.18	264	12,0	5,0	11,0	24.500	5.000	11.000	750	750	750	27.750	3.750	11.750	
3	1.1.1.1	Project started	100%	green		03.07.17	03.07.17	03.07.17	03.07.17	0				0	0	0				0	0	0	
4	1.1.2	Project start	100%	green	Peschke A.	03.07.17	13.07.17	03.07.17	14.07.17	12	5,0	4,0	4,0	7.000	4.000	4.000	750	750	750	8.750	4.750	4.750	
5	1.1.3	Project coordination	25%	green	Peschke A.	03.07.17	07.03.18	03.07.17	23.03.18	264				2.000	0	0				2.000	0	0	
6	1.1.4	Project controlling	25%	green	Peschke A.	27.07.17	25.02.18	17.07.17	12.02.18	211	5,0	1,0	5,0	11.500	1.000	5.000				11.500	1.000	5.000	
7	1.1.5	Project close down	0%	green	Peschke A.	03.03.18	07.03.18	19.03.18	23.03.18	5	2,0		2,0	4.000	0	2.000				5.500	0	2.000	
8	1.1.6	Project closed	0%	green		07.03.18	07.03.18	23.03.18	23.03.18	0				0	0	0				0	0	0	
9	1.2	ANALYSIS AND DECISION	38%	green		03.07.17	24.08.17	03.07.17	24.08.17	53	33,0	31,0	36,0	28.500	31.000	36.000	0	0	0	28.700	31.000	36.000	
10	1.2.1	Infrastructure analysis	100%	green	Todorovic M.	03.07.17	13.07.17	03.07.17	14.07.17	12				4.000	0	0				4.000	0	0	
11	1.2.2	Hardware analysis	100%	green	Gaier S.	03.07.17	29.07.17	03.07.17	21.07.17	19	10,0	10,0	10,0	5.000	10.000	10.000				5.000	10.000	10.000	
12	1.2.3	Software analysis	75%	green	Goldschmidt M.	03.07.17	27.07.17	03.07.17	28.07.17	26	20,0	20,0	22,0	11.000	20.000	22.000				11.000	20.000	22.000	
13	1.2.4	Documentation of analysis	25%	green	Peschke A.	28.07.17	27.07.17	17.07.17	28.07.17	12	1,0	1,0	2,0	3.500	1.000	2.000				3.500	1.000	2.000	
14	1.2.5	Analysis close down	0%	green		27.07.17	27.07.17	28.07.17	28.07.17	0				0	0	0				0	0	0	
15	1.2.6	Define alternatives	0%	green	Peschke A.	30.07.17	03.08.17	31.07.17	04.08.17	5	1,0		1,0	1.500	0	1.000				1.500	0	1.000	
16	1.2.7	Describe alternatives	0%	green	Ossany P.	06.08.17	10.08.17	31.07.17	11.08.17	12				1.500	0	0				1.500	0	0	
17	1.2.8	Presentation	0%	green	Hülzl S.	13.08.17	17.08.17	17.08.17	17.08.17	1	1,0		1,0	1.500	0	0				1.500	0	1.000	
18	1.2.9	Decide alternative	0%	green	Peschke A.	20.08.17	24.08.17	18.08.17	24.08.17	7				1.500	0	0				1.500	0	0	
19	1.2.10	Alternatives decided	0%	green		24.08.17	24.08.17	24.08.17	24.08.17	0				0	0	0				0	0	0	
20	1.3	DETAIL PLANNING	0%	green		27.08.17	03.10.17	25.08.17	03.10.17	40	57,0	0,0	62,0	47.000	0	62.000	2.500	0	4.500	51.500	0	66.500	
21	1.3.1	Detail planning - infrastructure	0%	green	Todorovic M.	27.08.17	21.09.17	25.08.17	14.09.17	21				6.500	0	0				6.500	0	0	
22	1.3.2	Detail planning - hardware	0%	green	Gaier S.	27.08.17	14.09.17	25.08.17	21.09.17	28	25,0		25,0	12.500	0	25.000	1.500	0	1.500	14.000	0	26.500	
23	1.3.3	Detail planning - software	0%	green	Goldschmidt M.	27.08.17	28.09.17	25.08.17	28.09.17	35	30,0		35,0	17.500	0	35.000	1.000	0	3.000	18.500	0	38.000	

The "Status" Tab

Switch to the "Status" tab, where you will find semi-automated progress reports on the project. The status report comprises different areas, clickable buttons and traffic lights, as well as freely editable text fields and calculated diagrams.

MS PowerPoint Export

Status Report

ITSys - 24.07.2017

overview

The project started das planned. The actual state analysis is widely finished, outcomes are currently being documented. Based on the restricted availability of the persons in charge the analysis of hardware and software took approx. one week longer than expected.

24.07.2017

Soft Facts

Team	<p style="font-size: 8px; margin: 0;">The mood of the team is exceptional positive. It seems that the team members are happy to participate in the project. They are motivated and reliable.</p>
Stakeholder	<p style="font-size: 8px; margin: 0;">In contrast to the team the support of the stakeholders is moderate. Nobody is working against the project, but it does not seem as if the users are interested in implementing the new system.</p>

Hard Facts

Progress and Deviation to Current Plan (in %)	Actual	Current	Base
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; position: relative;"> <div style="background-color: #0070c0; width: 100%; height: 100%;"></div> <div style="background-color: #92d050; width: 13%; height: 100%;"></div> </div> <div style="margin-left: 10px;"> <p style="font-size: 8px; margin: 0;">13%</p> </div> </div>	100%	100%	100%
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; position: relative;"> <div style="background-color: #0070c0; width: 100%; height: 100%;"></div> <div style="background-color: #92d050; width: 13%; height: 100%;"></div> </div> <div style="margin-left: 10px;"> <p style="font-size: 8px; margin: 0;">03.07.2017</p> </div> </div>	03.07.2017	03.07.2017	03.07.2017
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; position: relative;"> <div style="background-color: #0070c0; width: 100%; height: 100%;"></div> <div style="background-color: #92d050; width: 13%; height: 100%;"></div> </div> <div style="margin-left: 10px;"> <p style="font-size: 8px; margin: 0;">24.07.2017</p> </div> </div>	23.03.2018	14.03.2018	14.03.2018
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; position: relative;"> <div style="background-color: #0070c0; width: 100%; height: 100%;"></div> <div style="background-color: #92d050; width: 13%; height: 100%;"></div> </div> <div style="margin-left: 10px;"> <p style="font-size: 8px; margin: 0;">36</p> </div> </div>	290	516	516
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; position: relative;"> <div style="background-color: #0070c0; width: 100%; height: 100%;"></div> <div style="background-color: #92d050; width: 13%; height: 100%;"></div> </div> <div style="margin-left: 10px;"> <p style="font-size: 8px; margin: 0;">36.750</p> </div> </div>	302.000	308.200	308.200

The slippage is acceptable. There are a slightly more resources needed than expected, therefore the costs are lower than planned.

Further Steps

Decisions / Tasks	Responsibility	Date
Report of the needs for the software change-over to Management board	Rabl W.	11.08.17
Summary of project status and cleared CRs for Management board	Peschke A.	07.08.17
Summary lessons-learned of actual state analysis via email	Peschke A.	04.08.17

.....
Wolfgang Rabl, (Project Owner)

.....
Alexander Peschke, (Project Manager)

The areas of the status report are explained in detail in the table below.

Status Report Areas		
Area	Description	Technical Details
Overview	The header contains the reporting date of the progress report, followed by the overall project status and a free text description of developments since the latest communicated status.	The reporting date is taken from the "Cover". The traffic light status can also be displayed here by clicking on the right traffic light, although this is dependent on the status of the project objectives on the "Data" sheet. The left traffic light is edited manually but should show the status of the last report.
Soft Facts	In this field, the mood among the team and stakeholders can be described in written form.	The traffic lights on the left-hand side can be set by clicking them and are not related to any other worksheet within next project light.
Hard Facts	In this field, the progress of the individual subjects (scope, dates, resources and costs) is analysed.	The current values of the four subjects are rated with 100% each. Base and current values are put in relation (base / current divided by actual) and displayed in a bar chart.
Further Steps	This documents the necessary decisions and measures issued in the project controlling meeting and project owner meeting.	15 single-row measures are provided for each progress report which can also include responsibilities and deadlines.

The automatically calculated bars for status and deviations must be interpreted depending on the framework but offer a fast way of getting an integrated overview of all projects using the same defined calculation algorithms. They are explained below:

Status Report Calculations		
Area	Value	Description of the Calculation
Status	Scope	Actual equates to progress on the "Data" tab, current and base are always rated with 100% here.
	Dates	Start date is the actual start date in this case, end date is the reporting date on the "Cover" sheet. Current and base dates result from the values on the data sheet.
	Resources	Actual, current and base values are transferred from the data sheet.
	Costs	Actual, current and base values are transferred from the data sheet.

Details on the information categories base, actual, current and deviations under The "Data" Tab, page 15 **Fehler! Textmarke nicht definiert.** and Base Plan, page 32.

The project status report cannot be historicized directly in next project light but can be exported into MS Power Point and saved per reporting date. Regardless, it is possible to save the whole next project light file at different times.

9. Project Close-Down

An essential part of the project close-down is evaluating the project situation. This allows the organisation to learn from positive experiences and mistakes for future projects.

In a technical sense, the revision of project plans during the project close-down is the same as during the project controlling.

The “Close-Down” Tab

Switch to the “Close-Down” tab. The close-down report consists primarily of different text fields to document the reflections from the project close-down workshop.

Project Close Down Report
ITSys

Overall Impression

Reflection: Objectives
Objectives of the Project Assignment

	++	+	-	--
1 the it system meets the technical and legal requirements				
2 users are able to use the IT system (practically and technically)				
3 cost reduction of the supported process by 100,000 € until the en ...				

Reflection: Management

Reflection: Scope/Dates

Reflection: Resources/Costs

Reflection: Organisation/Communication

Performance Review

Lessons Learned

Plans of Remaining Tasks & Post-Project Activities

to do	Responsib.	Dates

Wolfgang Rabl, (Project Owner) Alexander Peschke, (Project Manager)

In the following table the project close-down report is explained in further detail:

Fields – Project Close-Down Report	
Fields	Description
Overall Impression	The overall project status can be specified here. Free text can be used to describe how the project has developed since the last status report, as well as the overall impression on the project.
Reflection	The reflection fields can be used to describe and assess the respective categories: objectives, management, scope/dates, resources/costs, organization/communication, performance review, lessons learned. The primary goal should be to reflect on objectives, since the objectives defined in the project assignment are listed here once again and can be assessed in four grades (++, +, -, --). Double-clicking on an objective assessment inserts an “x” and also removes any other “x” assessment of this objective.
Planning of Remaining Tasks and Post-Project Activities	Furthermore, the post-project phase can be manually scheduled, and unfinished WPs can be automatically transferred from the actual planning. By clicking the button “Transfer Unfinished WPs,” all WPs with a progress value of less than 100% (i.e. unfinished) can be automatically transferred to the to do list with respective responsible resource and end date (as far as there is sufficient space left).

There is no comparing base and actual values within the close-down report. Nevertheless, before closing a project, one last controlling process should be performed. For that, one last status report can be used.

S1. MS PowerPoint Export

The PowerPoint export, probably the easiest export available in next project light, does not require any special settings. There are only a few options to consider and with a single click a PowerPoint presentation can be created.

Here, primarily the status report is exported, partly as a non-editable picture, partly in a text or icon format.

Prepare PowerPoint Export

Make sure the PowerPoint template “next-project-light_PP-Template.pptx” is located in the same folder as the next project light file. The template can also be renamed or saved in a different location. In that case, when starting the export, next project light will prompt the user to define the template file.

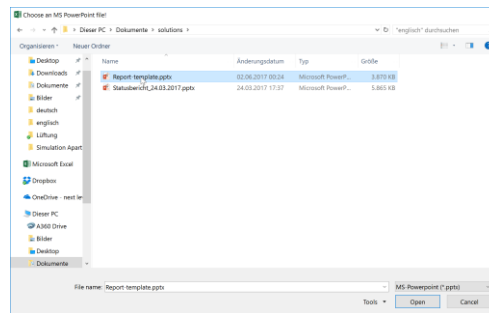
The PowerPoint template could technically be adapted by the user to a certain degree. However, since specific objects need to be included in the template and the scaling is dependent on the paper size, a configuration of the template should be coordinated with next level consulting.

Perform PowerPoint Export

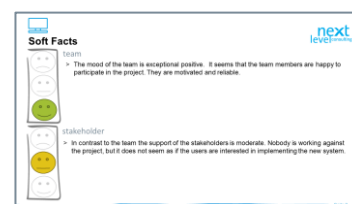
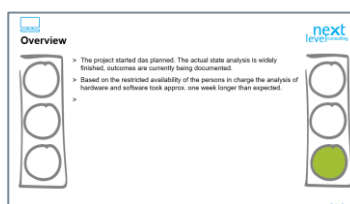
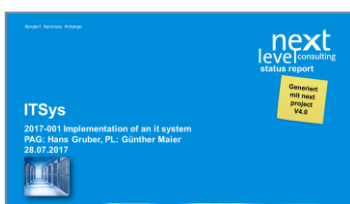
Switch to the “Status” tab and click the button “MS PowerPoint Export”.

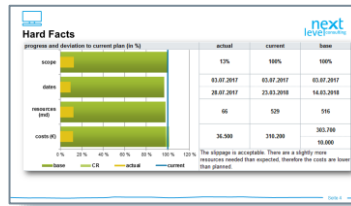


The export either immediately starts or, if the template could not be found, it can be selected from a pop-up window. After the export file is saved, next project light remembers the location of the template and will try to find it when performing the next export. Should next project light not be able to find the template the next time an export is performed, next project light again prompts the user to select the file manually.



The title of the exported PowerPoint presentation contains the project name, project number, a detailed description, project sponsor, project manager and reporting date, plus a scaled project logo (taken from the cover sheet in next project light – except for the reporting date of the status report). On the next four slides, elements of the current status report are inserted, where the first two solely consist of text and icons (that can be modified easily afterwards) and the last two slides are filled with pictures (not possible to edit text). Lastly, there are two conclusion slides which can be removed afterwards.





Decisions / tasks	responsibility	date
Report of the results for the software development to Management board	Oliver G.	11.08.17
Summary of project status and closed CRs to Management board	Oliver G.	07.08.17
Summary business journal of actual state analysis via email	Oliver G.	06.08.17

Der Statusbericht kann angepasst werden

- Der Statusbericht kann vom Layout selbst angepasst werden, solange
 - Die ersten 5 Slides in der Reihenfolge identisch zu bleiben
 - Relevante Text- und Grafikelemente erhalten bleiben (Empfehlung: Folien aus der Statusbericht Vorlage in die Corporate Design Vorlage kopieren und danach wieder ein Layout aus der Corporate Design Vorlage zuordnen.)
 - Text- und Grafikelemente können von Lage und Größe verändert werden, bitte auch hinsichtlich Farbung angepasst werden.
- Darüber hinaus kann der Statusbericht umfassend durch next level consulting gecustomized werden
 - Anpassung der Größe von zu exportierenden Bildern
 - Übergabe von weiteren Texten, Icons und Bildern

The Status Report may be adapted

- The layout of the status report may be adapted by itself, as long as
 - the first six slides stay in the same order
 - relevant text and graphic elements are kept (We recommend you copy slides from the status report template into the corporate design templates and then reassign a layout from the corporate design templates)
 - Size, position and colour of text and graphic elements may be changed.
- On top of this, next level consulting can customize your status report to
 - adapt the size of exported images
 - transfer more text, icons and images



After the export, the report is automatically saved as a PowerPoint file in the same folder as next project light with the following file name: "Status Report_DDMMYYYY.pptx". After that, the presentation can be modified by adding, deleting or partly editing slides.

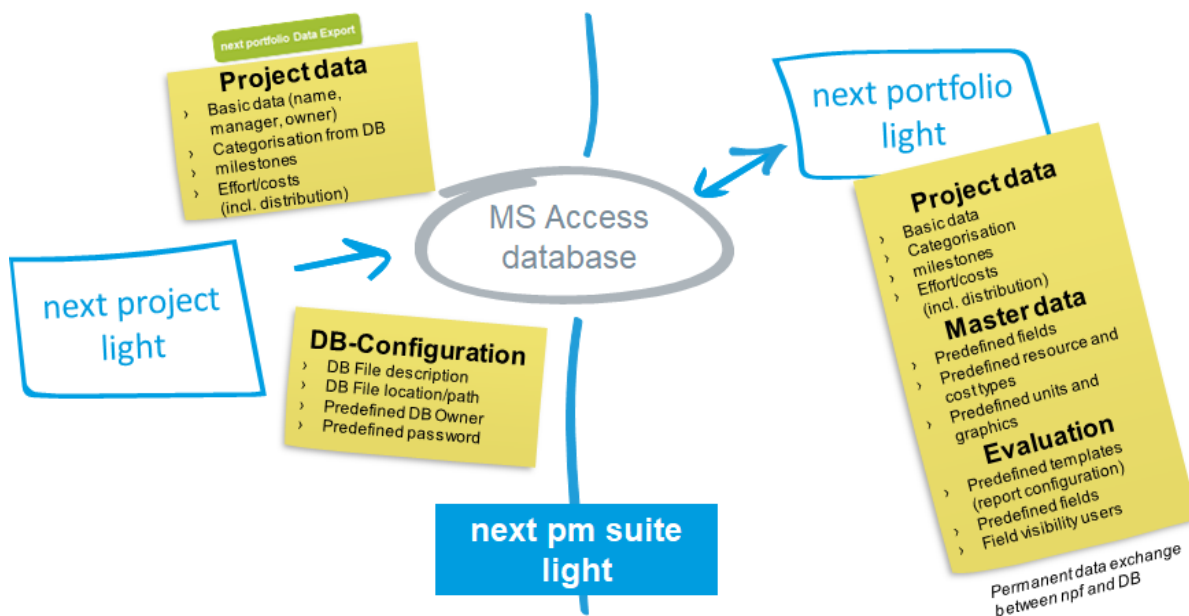
S2. next portfolio light Export

At this moment, the export to next portfolio light is only available in German, other languages are in the works. The following describes the functionality of the export in the German version.

next project light is often used without next portfolio light (V5.0 and onwards). In that case, projects can be planned and controlled separately. The following section describes the interface to the free version of next portfolio – next portfolio light set up by next level consulting.

The data transfer from next project light only takes place via the database. Generally, the Excel sheet can be further edited offline.

First, the architecture and the data exchange between the two tools is described. Then the button functions are explained in detail. Finally, specific use cases are described.



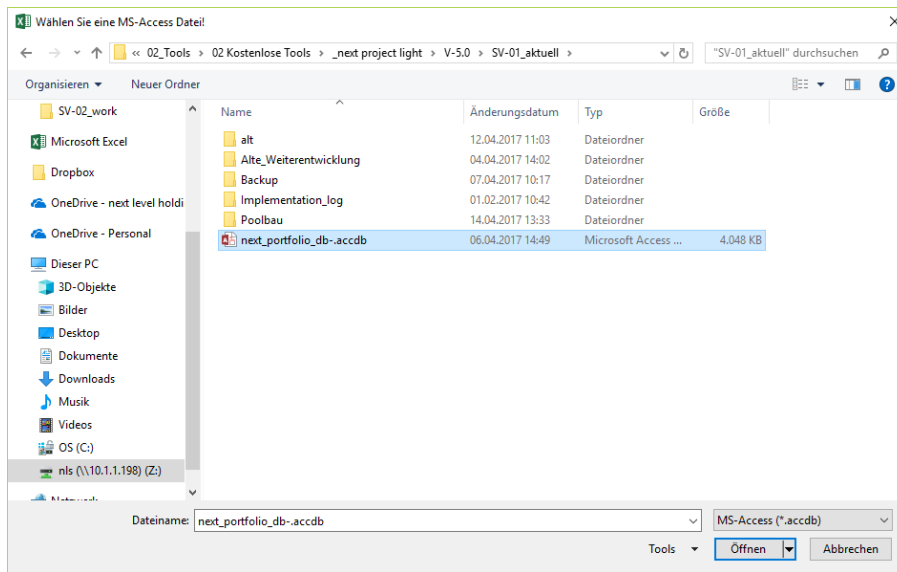
next portfolio light requires a connection to the MS Access DB file, while next project light has to be connected during the export only.

Create database connection

next portfolio light has to be set up and the access file saved in a known path (usually the name of the file is "next_portfolio_db.accdb") before connecting to the database. MS Access does not have to be installed.



After clicking the button "npf Data Export" on the cover sheet, next project light looks for the MS Access database file in the same order as next project light. The file can also be renamed or saved in a different location. In that case next project light will prompt the user to define the database file. Choose the correct MS Access file, which is connected to next portfolio light.



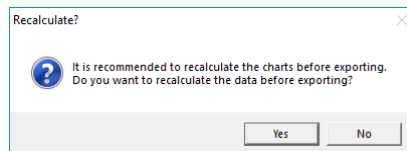
The export immediately starts as described in the next chapter. If next project light is saved after the export, the database configuration is saved too. If the file is renamed or saved in a different location, the same must be repeated.

Unlike in the full version of next portfolio, where master data like user-defined fields and resource- and cost types can be administrated, in the next pm suite light, the master data is predefined and does not need to be imported, the import only contains content.

Write data

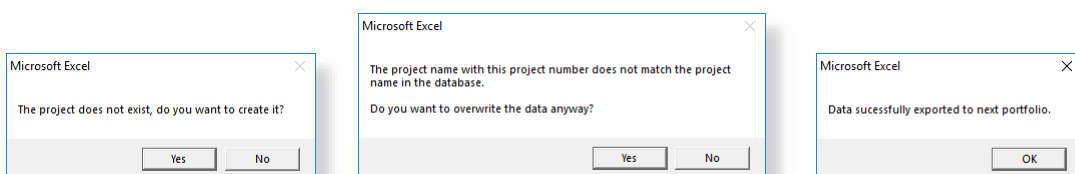
If the planning was created or adjusted based on the project controlling and the project status was updated, the appropriate key data of the project will be passed on to the database.

Clicking the button “npf Data Export” transfers the project data to the next portfolio light database.

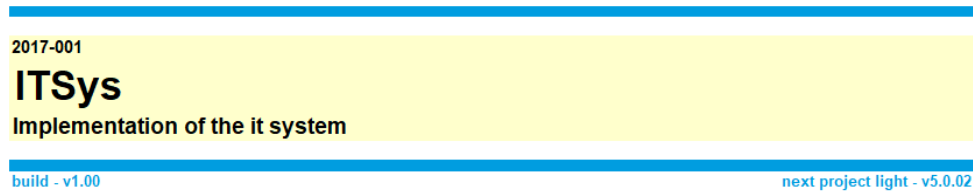


Since some data is imported from existing reports (e.g. the milestone plan, which is generated automatically from actual scheduling on the “Data” tab by clicking a button), next project light enables you to refresh all graphics before an import. In case no changes have been performed since the last “Refresh Graphics” this can be declined by selecting “No”.

It will be checked if the project number on the cover sheet exists in the central database. If not, the user needs to decide whether the project should be created in the DB. If the project number already exists, next project checks if the names are identical, in order to prevent the software from overwriting another user’s project.



If “Yes” is selected, meaning the project with identical project number and name already exists, the key data is then transferred to the central database and the project number is locked for further use for the respective user.



With the export, not all data is transferred to the database. In standard use, only key data relevant for steering projects on portfolio level is carried over.

Generally, the following data is transferred:

- > General data, like project name, number and project manager
- > Drop-downs on the cover sheet
- > Milestones with all dates
- > Effort on project level spread over months
- > Costs on project level, divided into cost types and spread over months
- > Additional status information from the status report (due date, traffic light status, progress, status description, etc.)

Given that standard next project light does not perform a global check on rights, any user who has reading rights to the project handbook can export project data.

In the standard configuration, there is no possibility to reimport data from next portfolio light to next project light. Hence, it doesn't make sense to maintain project data in next portfolio light manually because the changes are automatically overwritten during the next export.

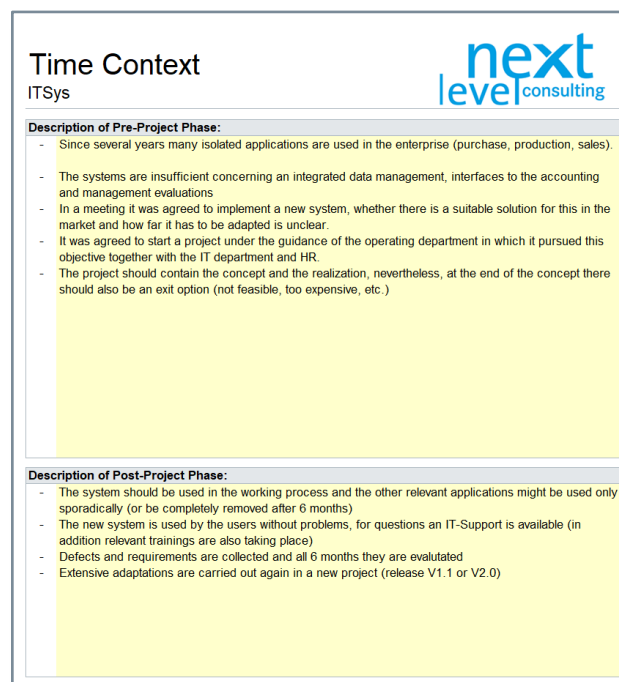
Specifics of next project light+

The difference between next project light and next project light+ is limited to it having additional rows in the stakeholder analyses and on the “Data” sheet, the additional methods “Context” and “WPs”, as well as 3 sheets that are completely free for editing. There are no technical restrictions and functions on these additional sheets.

The additional pre-configured and free tabs are detached from the project handbook, there is only a link to the project name and a language change functionality for the captions.

The “Context” Tab

The pre-project phase and the post-project phase are primarily fields that can be manually edited. A maximum of 15 bullet points can be used to describe the pre-project phase and 10 to describe the post-project phase.



The “WPs” Tab

It is not necessary to provide specifications for all WPs neither from a technical nor a content point of view. In next project light+, there is a possibility to specify a work package, structure and layout can be edited variable.

Is the structure for the work package specification correct, the cells must be marked, copied and pasted underneath for the number of work packages, which must be specified. There are no links to the project structure on the “Data” tab.

A	B	C	D	E	F	G	H	I	J	
1										
2	Workpackage Specifications									
3	ITSys									
4										
5										
6	WBS Code			Work Package						
7										
8	WP Content									
9										
10										
11	WP Results									
12										
13										
14	WP Progress Measuring									
15										
16										

Free Tabs

Free tabs function like tabs in a new MS Excel file, but the tab name and the order cannot be changed. The tabs are not locked, and formulas can be used, photos and pictures inserted. Rows and columns can be inserted and deleted, also enlarged or reduced. Also, border, background and content can be formed without restrictions. If necessary, formulas can be linked on content of other sheets.

	A	B	C	D
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

	A	B	C	D	E	F
1						
2		turnover:	€ 200.000,00		see customer assignment	
3		project costs:	€ 180.000,00		see project assignment	
4		profit margin	€ 20.000,00			

Formula bar: C3 =Assignment!I157

List of Abbreviations

The following table collects all relevant and frequently used terms and abbreviations that were used in the manual.

List of Abbreviations		
Abbreviation	Full Term	Meaning
DB	Database	The data from next project light is generally saved in an MS Excel file, however, for the exchange between next project light and next portfolio light a MS Access database is used.
md	Man-Day	A man-day, or less frequently called person-day, is the amount of work performed by the average worker in one day. Like the man-hour it is a unit with which you can estimate the effort of resources.
MS	Microsoft	next project builds upon a Microsoft-based framework. You will need MS Excel 2007 or a newer version. There are also interfaces to other MS Office applications.
npf	next portfolio	next portfolio is a tool that provides support for portfolio management, which will be treated in a separate manual. This manual only talks about information relevant for interfaces with next portfolio light.
npj	next project	next project is the tool that provides support for single project management, a similar abbreviation for next project, next project light and next project light+ is used.
PHB	Project Handbook	When next project light is filled with project specific data, it is called a project handbook. A project handbook contains all PM-specific documents and comprises all project plans.
PM	Project Management	In practice, a lot of terms are shortened to PM. In this manual, PM always refers to project management, which stands for the planning and controlling of a single project.
VBA	Visual Basic for Applications	An additional programming language for the application of MS Office, like Visual Basic for editing or adding functions and formulas in MS Excel.
WP	Work Package	A work package is the smallest shared planning unit of efforts in the work breakdown structure. They are defined in the data sheet.