PLAN FIRST PPM

Project Portfolio Management System

COMPLETE USER GUIDE

QUANTRIL TECHNOLOGIES PRIVATE LIMITED

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Executive Summary

Plan First PPM is a comprehensive Project Portfolio Management system built on a modern platform that enables organizations to manage the complete lifecycle of ideas, demands, and projects from conception to closure. The system provides end-to-end visibility and control over your entire project portfolio with integrated idea management, demand planning, budget tracking, project execution, and status reporting capabilities.

System Overview

Plan First PPM is designed around a streamlined workflow that transforms ideas into delivered projects. The system consists of six core modules:

- Idea Management: Capture and evaluate new business ideas
- Demand Management: Convert approved ideas into formal demands with business cases
- Project Management: Execute approved demands as structured projects
- Risk & Issue Management: Track and mitigate project risks and issues
- Decision & Action Tracking: Document key decisions and action items
- Status Reporting: Automated report generation and distribution

Module 1: Idea Management

Overview

The Idea Management module serves as the entry point for all new business initiatives. It provides a structured approach to capturing, evaluating, and approving ideas before they move into formal demand planning. The module features customizable views, visual dashboards, and a streamlined approval workflow.

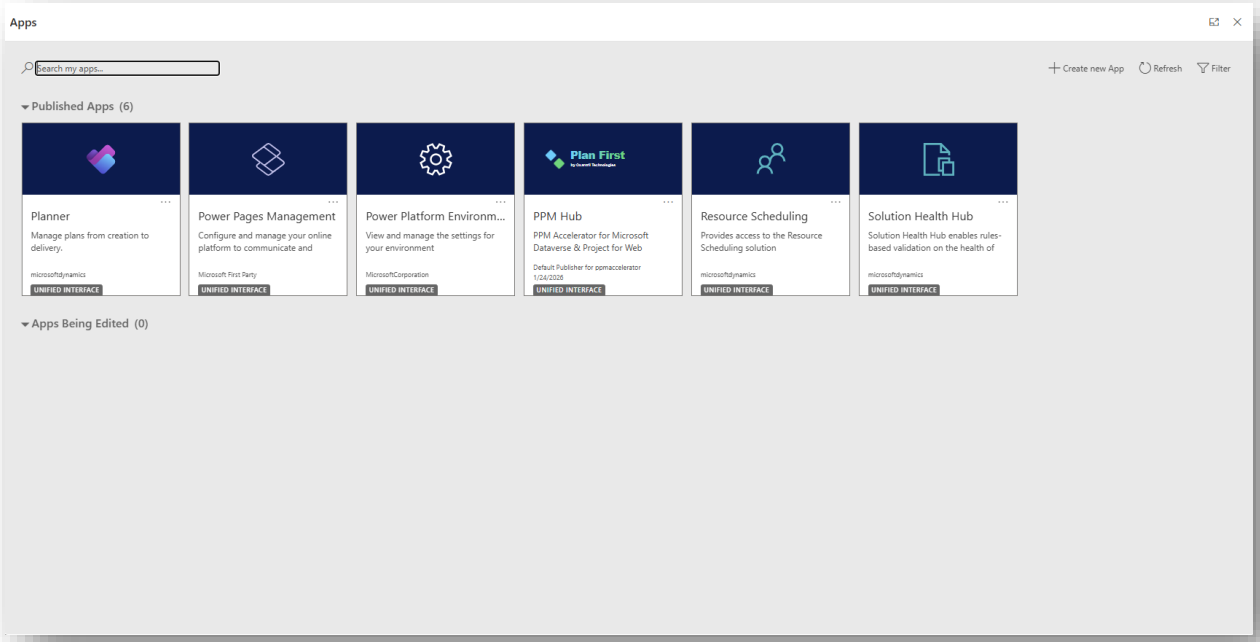
Key Features

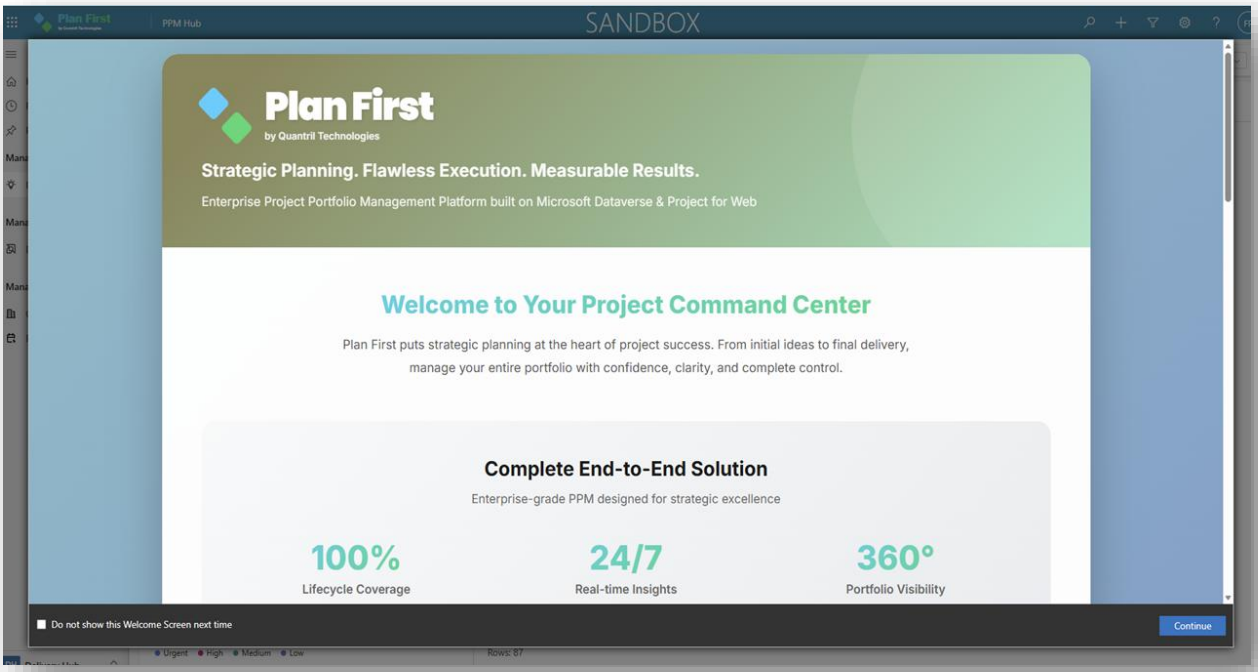
- Interactive dashboard with customizable charts and views
- Draft and submit workflow for idea refinement
- Activity tracking and collaboration tools
- Email and appointment integration
- Automated approval routing and notifications

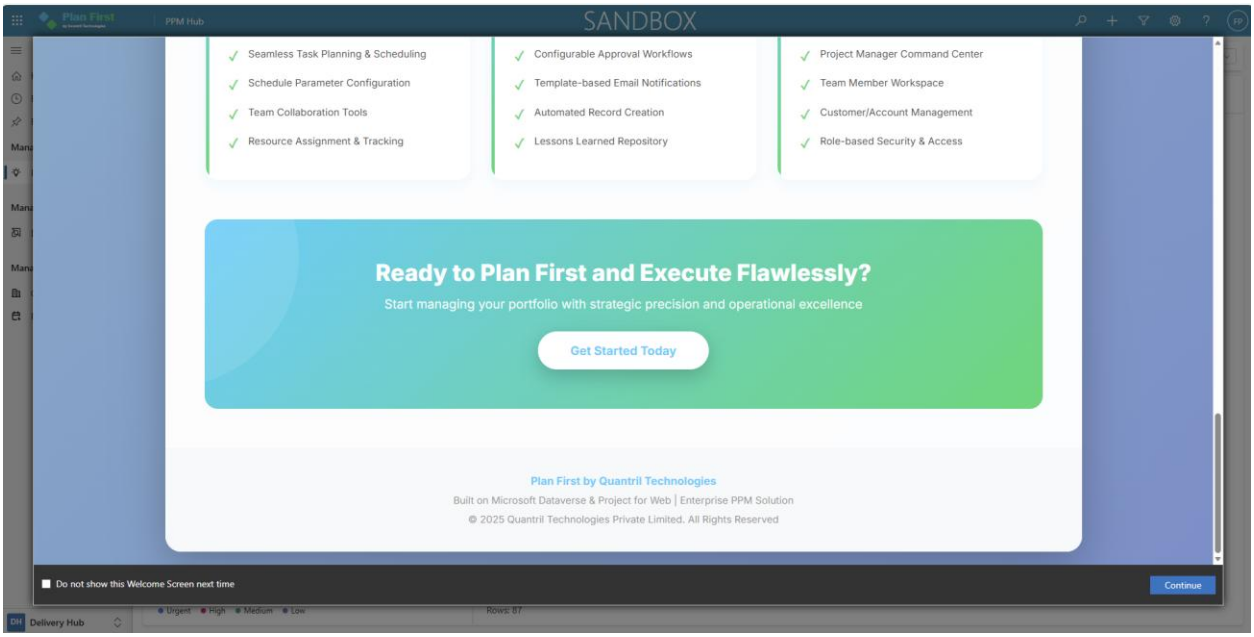
Step-by-Step Process

1. Accessing the System

- Click the Plan First App from your application menu

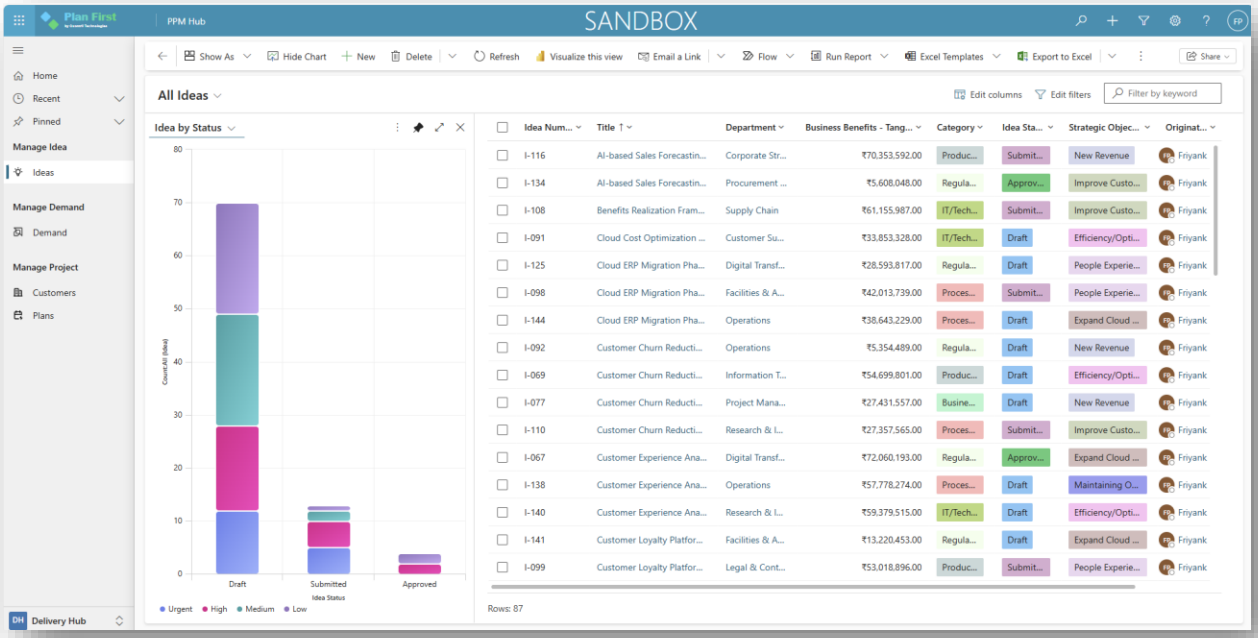




- Scroll down to view the Idea Management dashboard
- 

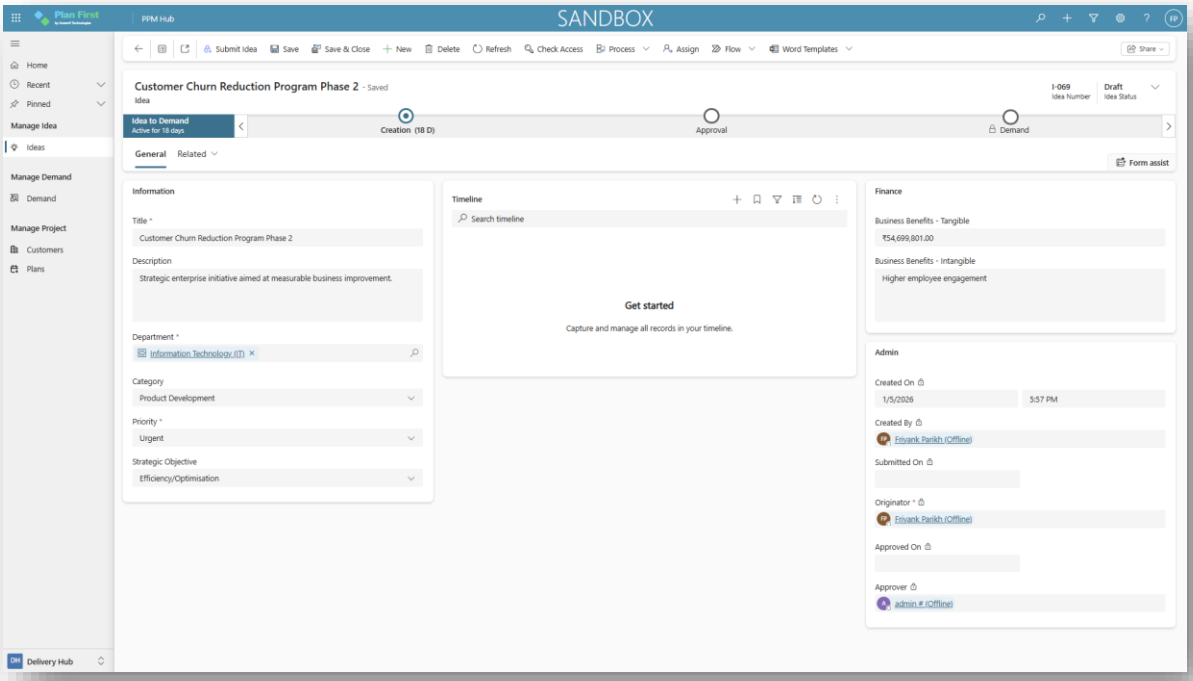
2. Navigating the Dashboard

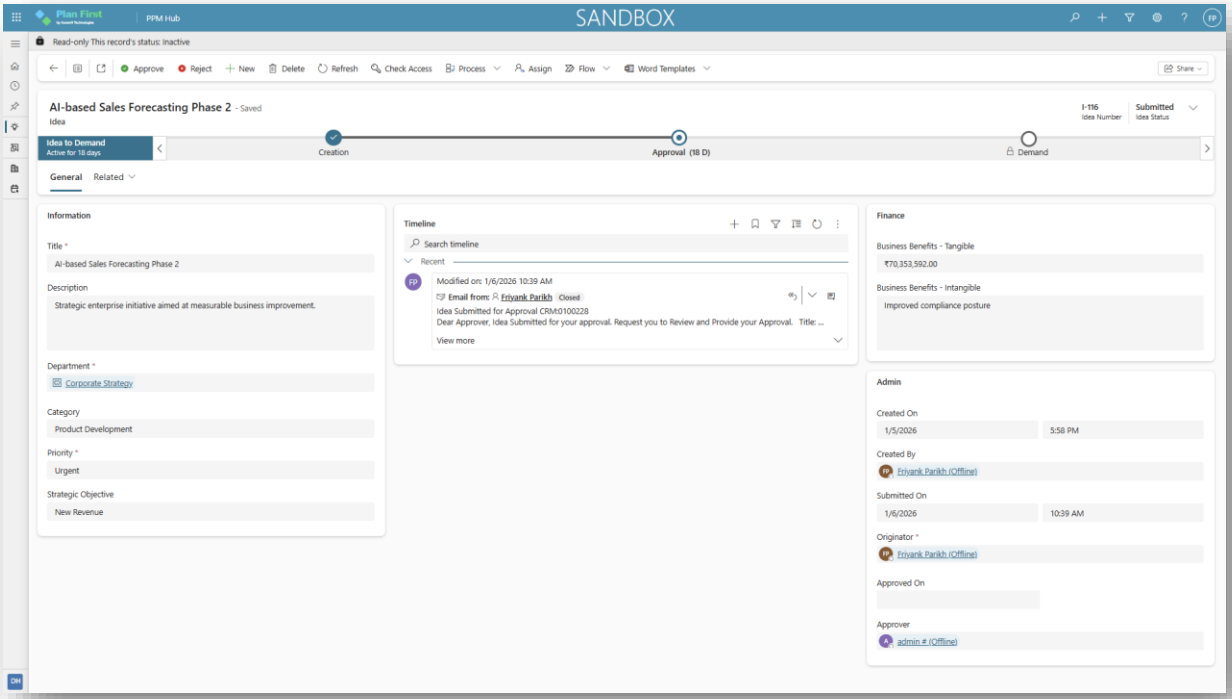
- Use show/hide charts to customize your view
- Switch between different view layouts
- Change chart types to visualize data differently
- Click on any idea record to open and review details

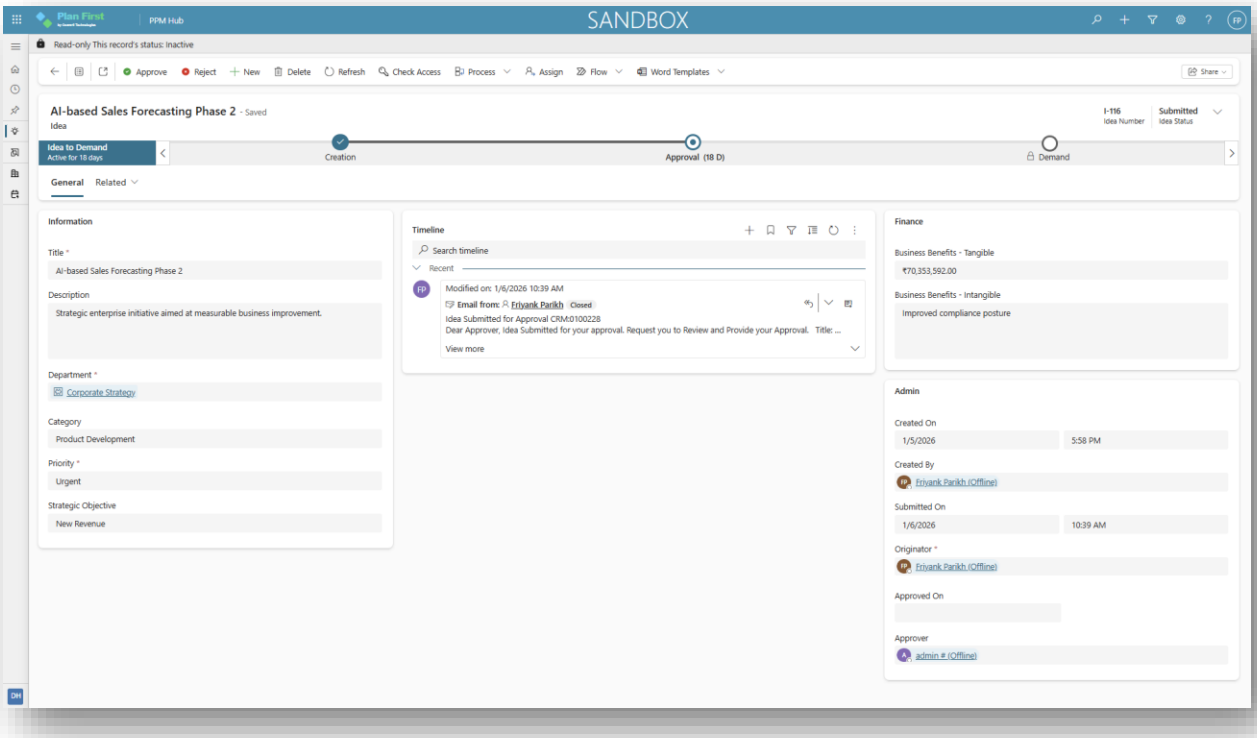

Plan First
PPM Hub
SANDBOX
Home
Recent
Pinned
Manage Idea
Ideas
Manage Demand
Demand
Manage Project
Customers
Plans
Delivery Hub
Show As
Hide Chart
New
Delete
Refresh
Visualize this view
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
Share
All Ideas
Edit columns
Edit filters
Filter by keyword
Idea by Status
Count:All (Ideas)
Draft
Submitted
Approved
Idea Status
Urgent
High
Medium
Low
Idea Num...
Title
Department
Business Benefits - Tang...
Category
Idea Sta...
Strategic Objec...
Originat...
I-116 AI-based Sales Forecastin... Corporate Str... ₹70,353,592.00 Produc... Submit... New Revenue Friyank
I-134 AI-based Sales Forecastin... Procurement ... ₹5,608,048.00 Regula... Approv... Improve Custo... Friyank
I-108 Benefits Realization Fram... Supply Chain ₹61,155,987.00 IT/Tech... Submit... Improve Custo... Friyank
I-091 Cloud Cost Optimization ... Customer Su... ₹33,853,328.00 IT/Tech... Draft Efficiency/Opti... Friyank
I-125 Cloud ERP Migration Pha... Digital Transf... ₹28,593,817.00 Regula... Draft People Experie... Friyank
I-098 Cloud ERP Migration Pha... Facilities & A... ₹42,013,739.00 Proces... Submit... People Experie... Friyank
I-144 Cloud ERP Migration Pha... Operations ₹38,643,229.00 Proces... Draft Expand Cloud ... Friyank
I-092 Customer Churn Reducti... Operations ₹5,354,489.00 Regula... Draft New Revenue Friyank
I-069 Customer Churn Reducti... Information T... ₹54,699,801.00 Produc... Draft Efficiency/Opti... Friyank
I-077 Customer Churn Reducti... Project Mana... ₹27,431,557.00 Busine... Draft New Revenue Friyank
I-110 Customer Churn Reducti... Research & I... ₹27,357,565.00 Proces... Submit... Improve Custo... Friyank
I-067 Customer Experience Ana... Digital Transf... ₹72,060,193.00 Regula... Approv... Expand Cloud ... Friyank
I-138 Customer Experience Ana... Operations ₹57,778,274.00 Proces... Draft Maintaining O... Friyank
I-140 Customer Experience Ana... Research & I... ₹59,379,515.00 IT/Tech... Draft Efficiency/Opti... Friyank
I-141 Customer Loyalty Platfor... Facilities & A... ₹13,220,453.00 Regula... Draft Expand Cloud ... Friyank
I-099 Customer Loyalty Platfor... Legal & Cont... ₹53,018,896.00 Produc... Submit... People Experie... Friyank
Rows: 87

3. Creating a New Idea

- Click 'Create New' to start a new idea submission
- Fill in the required fields describing your idea
- Save as Draft to continue working later, or
- Submit Idea to send for approval




Plan First
PPM Hub
SANDBOX
Read-only This record's status: inactive
Approve
Reject
New
Delete
Refresh
Check Access
Process
Assign
Flow
Word Templates
Share
AI-based Sales Forecasting Phase 2 - Saved
Idea
I-116
Idea Number
Submitted
Idea Status
Idea to Demand
Active for 18 days
Creation
Approval (18 D)
Demand
General
Related
Information
Title *
AI-based Sales Forecasting Phase 2
Description
Strategic enterprise initiative aimed at measurable business improvement.
Department *
Corporate Strategy
Category
Product Development
Priority *
Urgent
Strategic Objective
New Revenue
Timeline
Search timeline
Recent
Modified on: 1/6/2026 10:39 AM
Email from: Friyank Parikh Closed
Idea Submitted for Approval CRM:0100228
Dear Approver, Idea Submitted for your approval. Request you to Review and Provide your Approval. Title: ...
View more
Finance
Business Benefits - Tangible
₹70,353,592.00
Business Benefits - Intangible
Improved compliance posture
Admin
Created On
1/5/2026
5:58 PM
Created By
Friyank Parikh (Offline)
Submitted On
1/6/2026
10:39 AM
Originator *
Friyank Parikh (Offline)
Approved On
Approver
admin # (Offline)


Plan First
PPM Hub
SANDBOX
Read-only This record's status: inactive
Approve
Reject
New
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Word Templates
Share
AI-based Sales Forecasting Phase 2 - Saved
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Business Benefits - Intangible
Improved compliance posture
Admin
Created On
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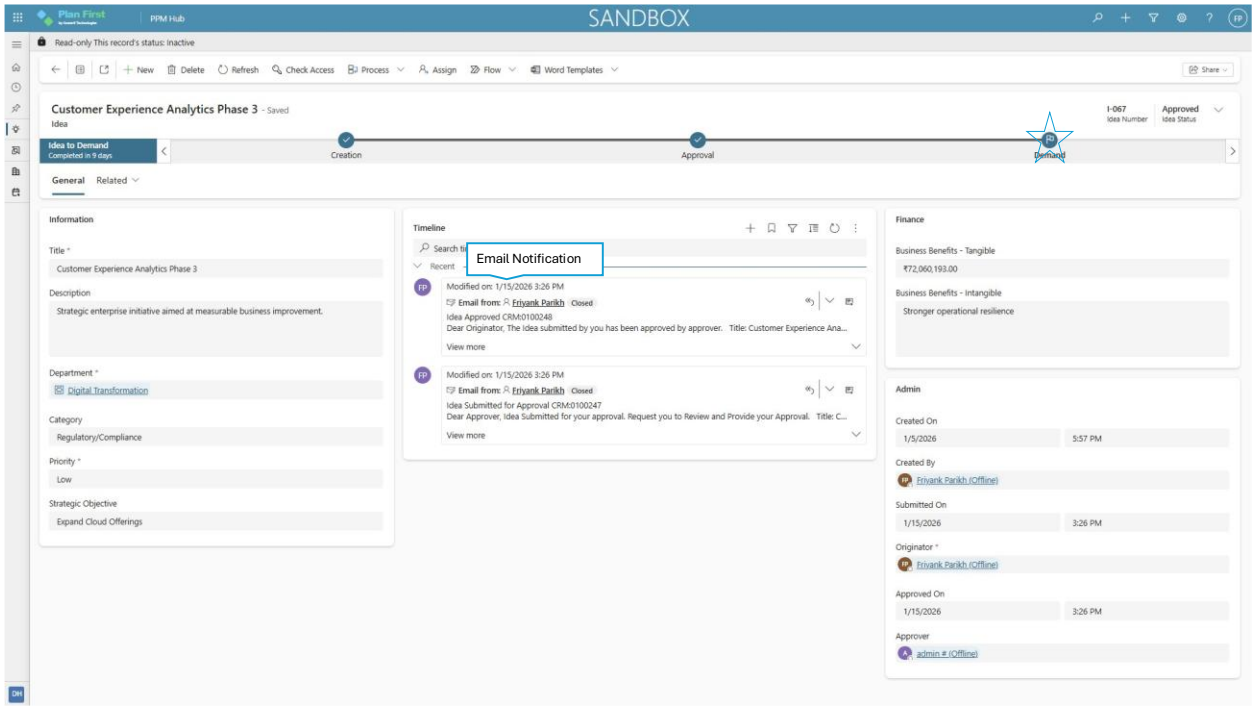
5:58 PM
Created By
Friyank Parikh (Offline)
Submitted On
1/6/2026
10:39 AM
Originator *
Friyank Parikh (Offline)
Approved On
Approver
admin # (Offline)

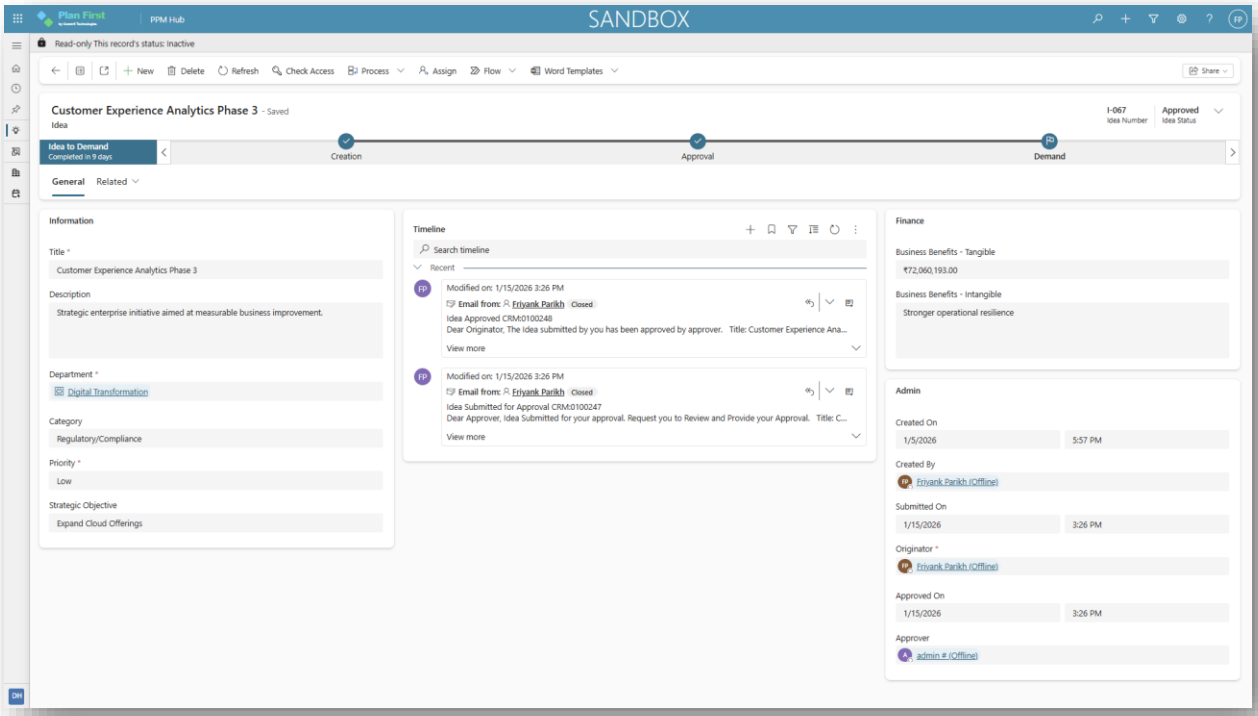
4. Tracking and Collaboration

- View activity history on each idea record
- Create emails or appointments directly from the idea
- Track the assigned idea approver



5. Approval Process

- Approvers receive email notifications when ideas are submitted
- Approvers can Approve or Reject the idea
- Submitters receive email notifications of the decision
- Approved ideas automatically qualify as Demands for further processing



Module 2: Demand Management

Overview

Demand Management transforms approved ideas into fully developed business cases with scoring, benefits analysis, and detailed budgeting. This module uses weighted scoring criteria to prioritize demands and includes comprehensive budget management with approval workflows and version control.

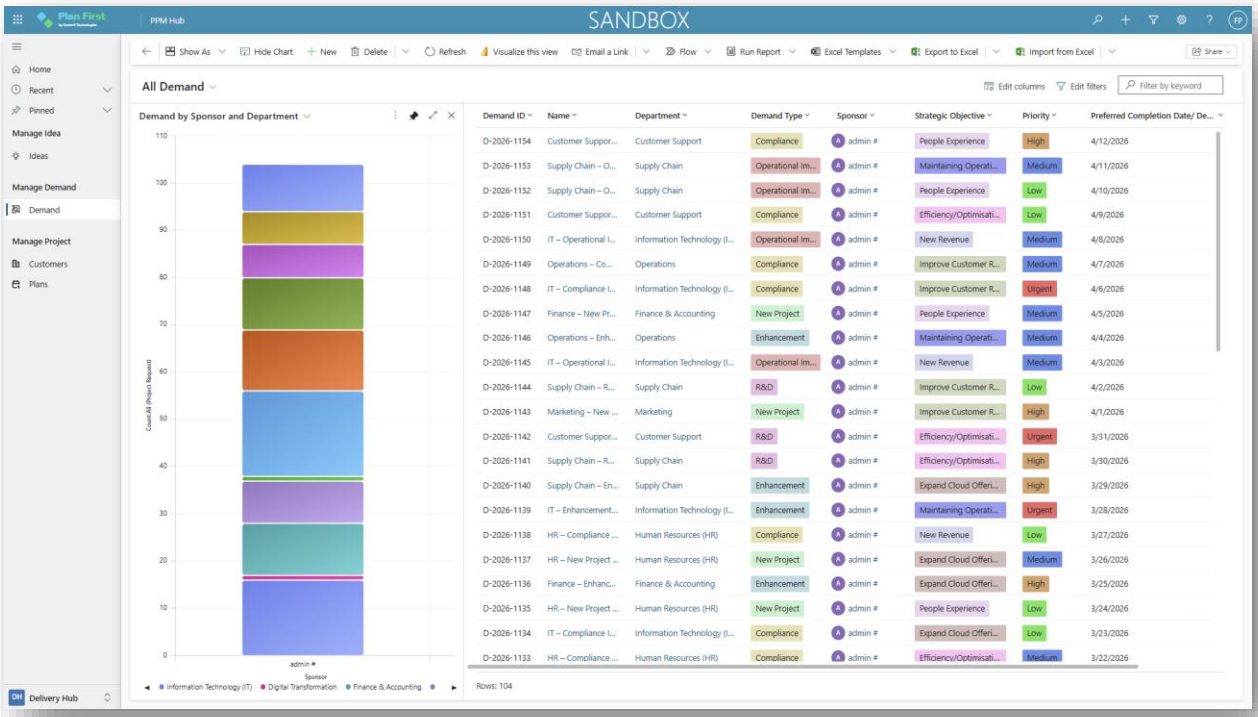
Key Features

- Automated demand scoring based on configurable criteria
- Benefits tracking with tangible and intangible classifications
- Multi-version budget management with sales and cost tracking
- Profit margin calculation and analysis
- Configurable approval workflows
- Rich text editing with copy-paste support for images and formatted text

Step-by-Step Process

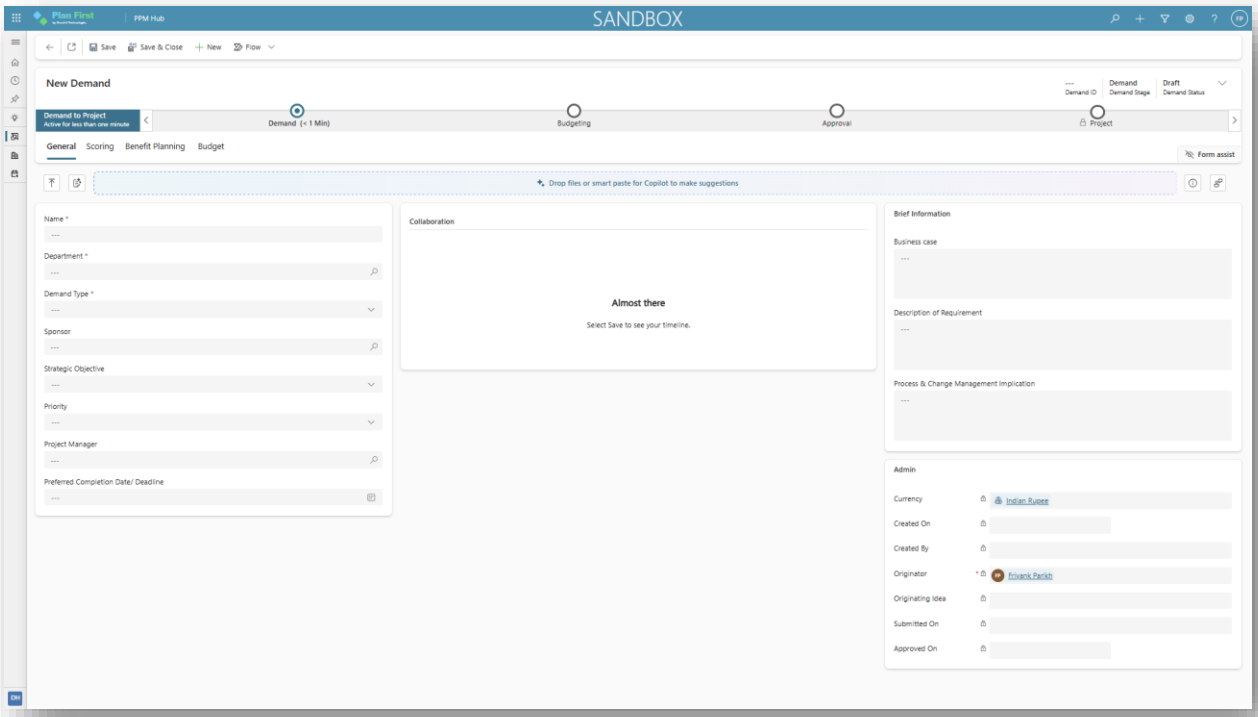
1. Viewing and Creating Demands

- Access 'View All Demands' from the dashboard
- Customize charts and views like Idea Management
- Click 'Create New' to start a new demand (or it auto-creates from approved ideas)
- Open existing demand records to review or edit



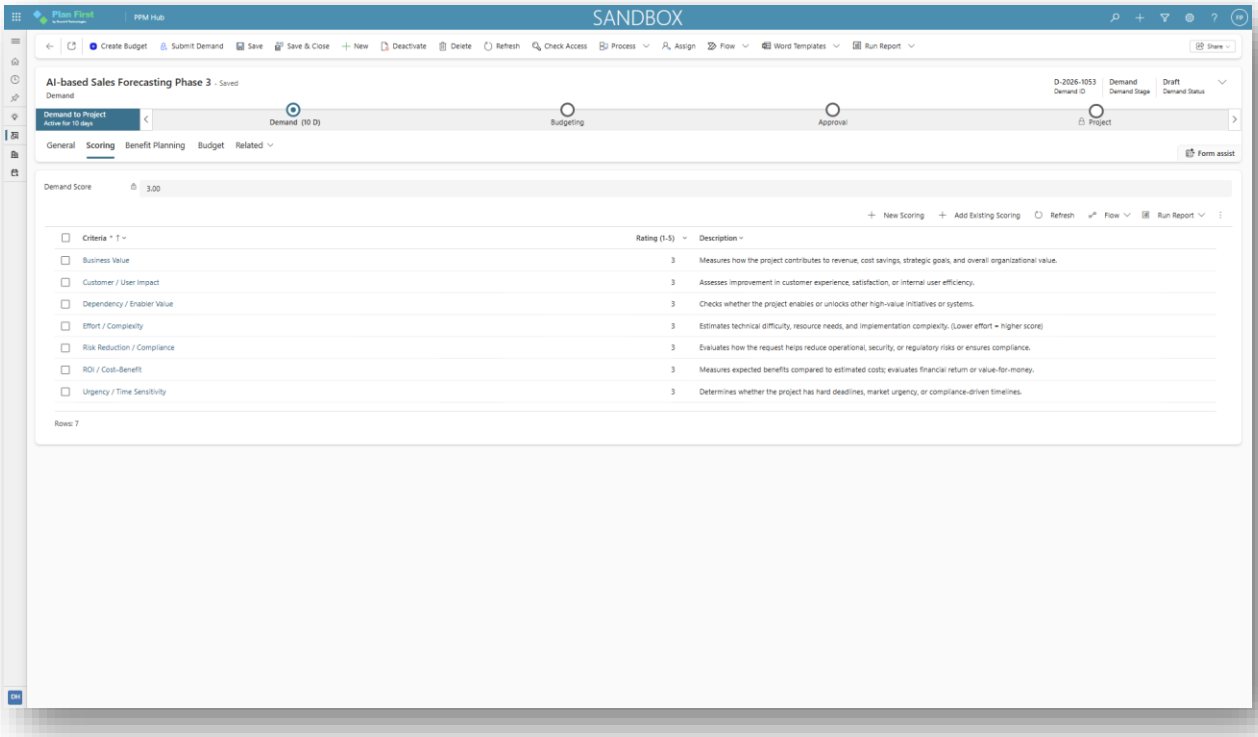
2. Filling the Demand Form

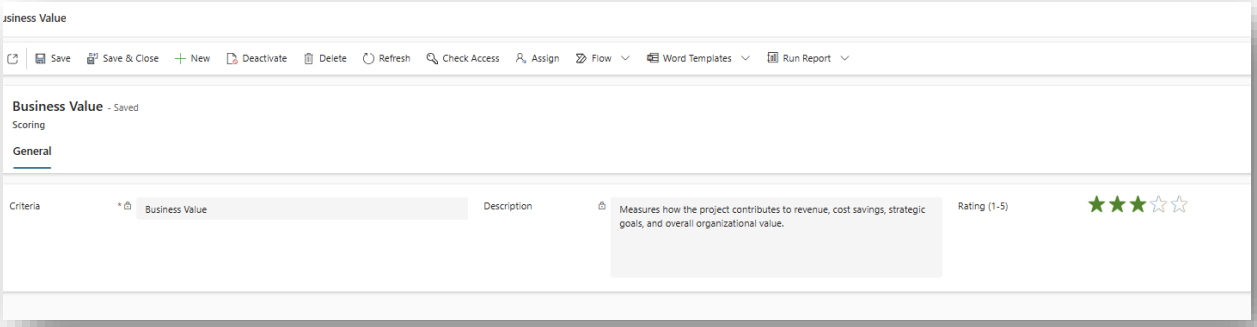
- Complete all required fields with demand details
- Use copy-paste functionality to add formatted text and images
- Save as Draft to continue later



3. Demand Scoring

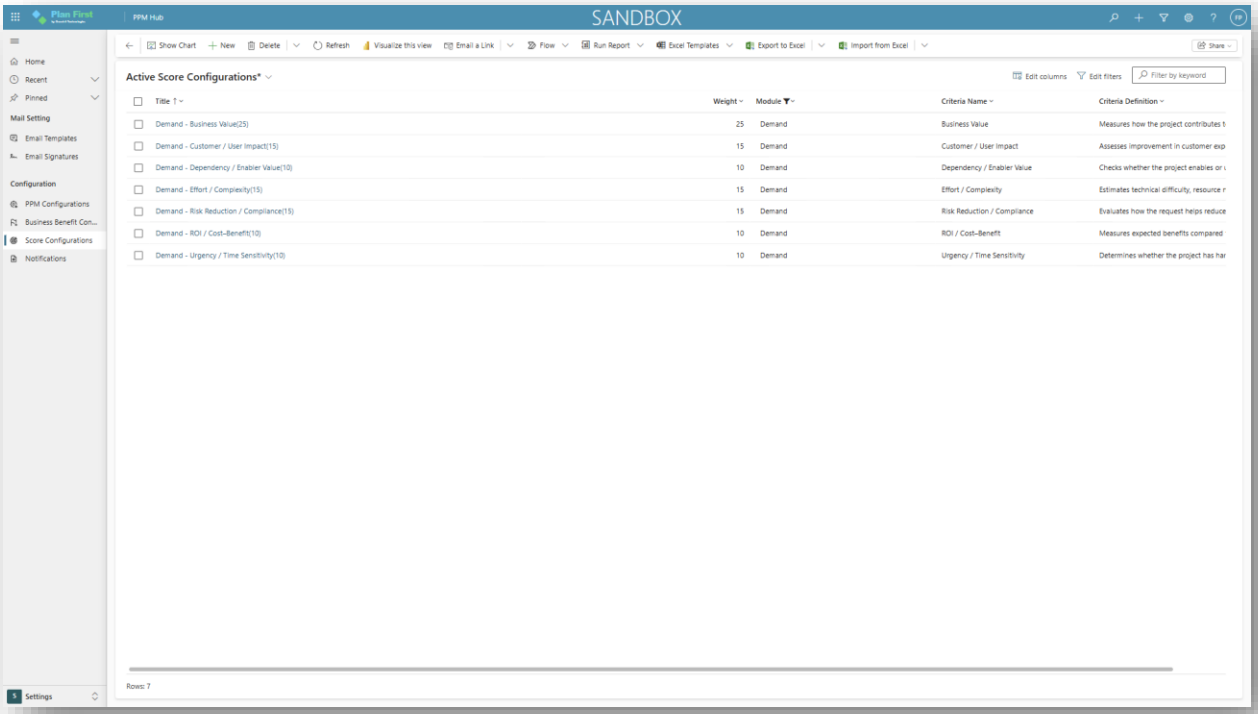
- Click to update rating for each criteria (rated 1-5)
- Demand score is automatically calculated based on weightage defined in configuration
- Review calculated score to understand demand priority





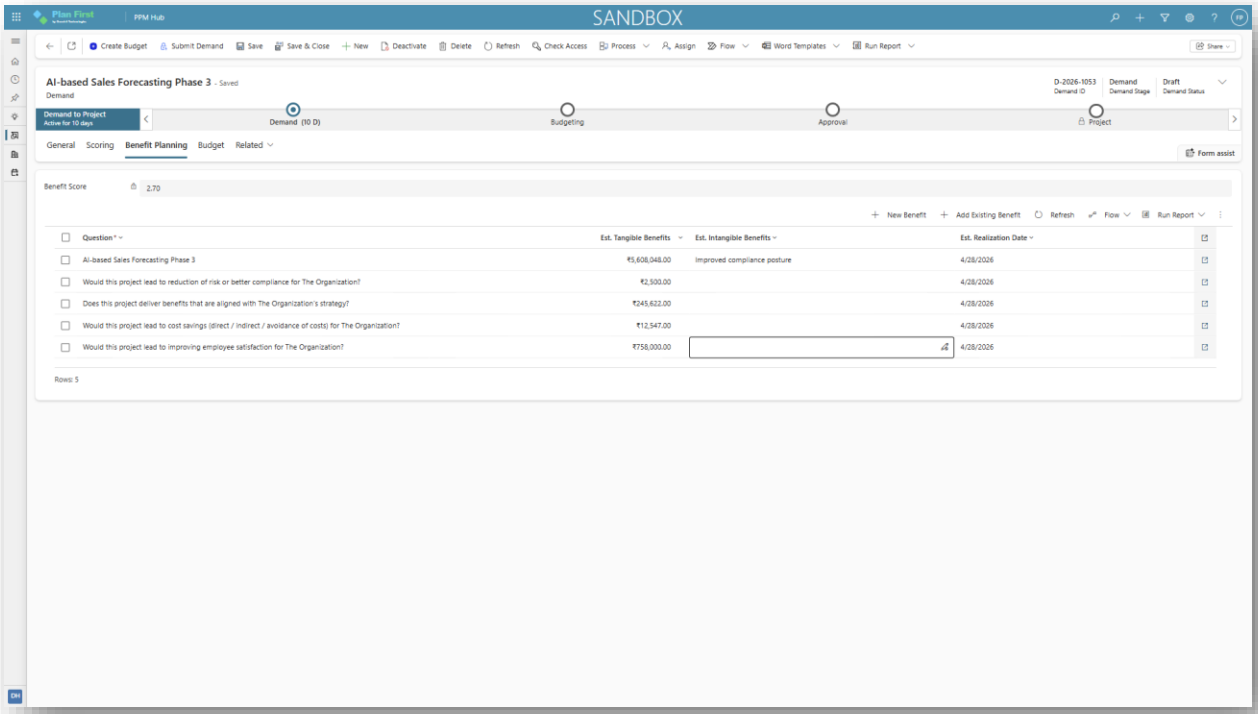
4. Configuring Score Weights

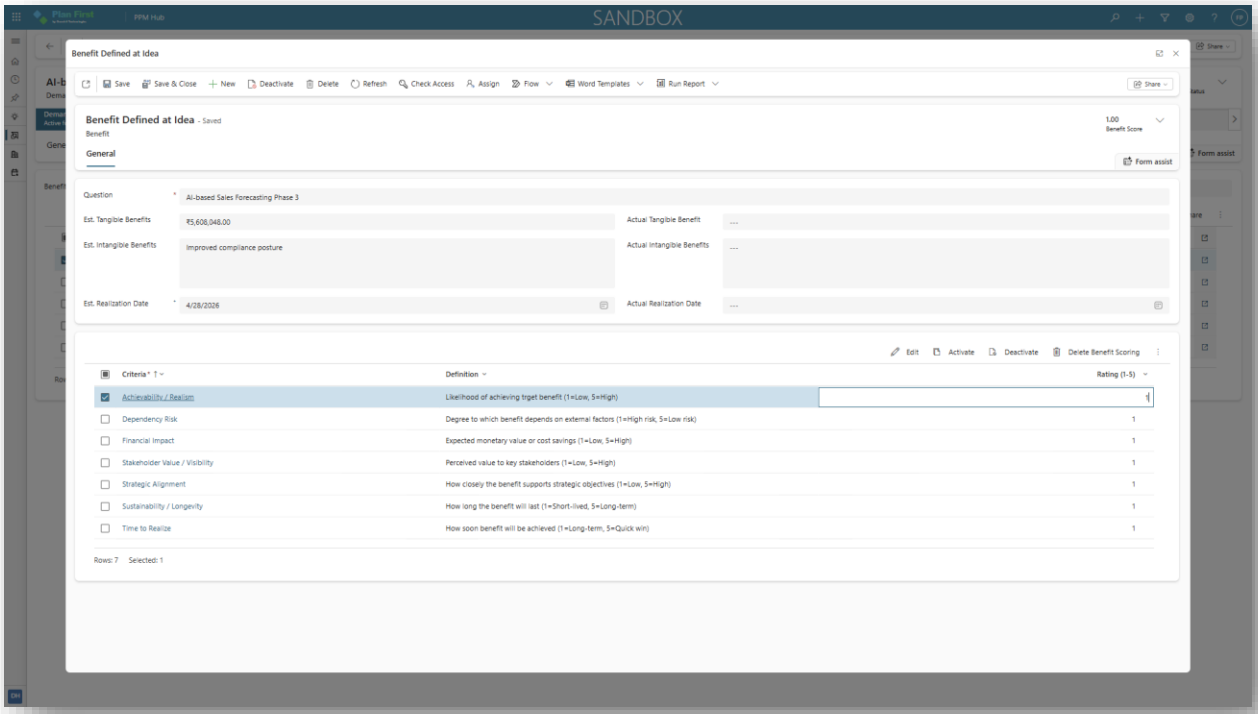
- Switch to Settings to access configuration
- View all score configurations
- Set or review weight for each demand criteria (system-wide setting)



5. Benefits Management

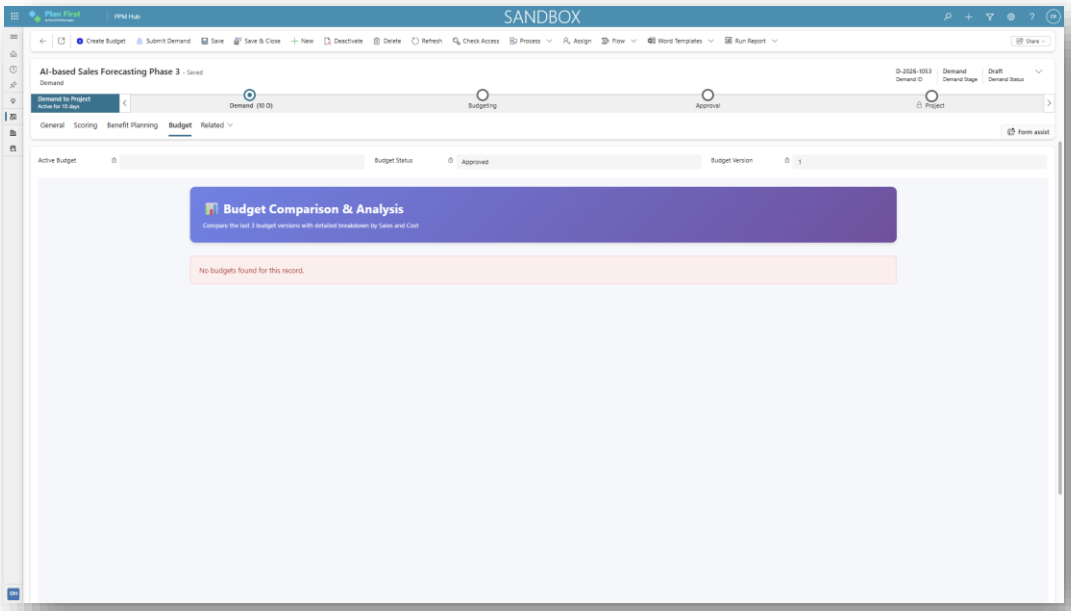
- Navigate to the Demand Benefit section
- Update benefit descriptions and estimated realization dates
- Rate benefits from 1-5 based on impact
- Benefit score is calculated based on configured weightage

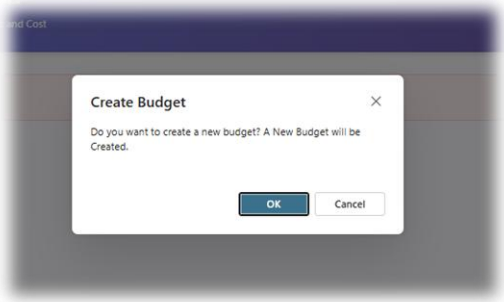

Plan First
PPM Hub
SANDBOX
Create Budget
Submit Demand
Save
Save & Close
New
Deactivate
Delete
Refresh
Check Access
Process
Assign
Flow
Word Templates
Run Report
Share
AI-based Sales Forecasting Phase 3 - Saved
Demand
D-2026-1053
Demand ID
Demand
Demand Stage
Draft
Demand Status
Demand to Project
Active for 10 days
Demand (10 D)
Budgeting
Approval
Project
General
Scoring
Benefit Planning
Budget
Related
Form assist
Benefit Score
2.70
New Benefit
Add Existing Benefit
Refresh
Flow
Run Report
Question
Est. Tangible Benefits
Est. Intangible Benefits
Est. Realization Date
AI-based Sales Forecasting Phase 3
₹5,608,048.00
Improved compliance posture
4/28/2026
Would this project lead to reduction of risk or better compliance for The Organization?
₹2,500.00
4/28/2026
Does this project deliver benefits that are aligned with The Organization's strategy?
₹245,622.00
4/28/2026
Would this project lead to cost savings (direct / indirect / avoidance of costs) for The Organization?
₹12,547.00
4/28/2026
Would this project lead to improving employee satisfaction for The Organization?
₹758,000.00
4/28/2026
Rows: 5

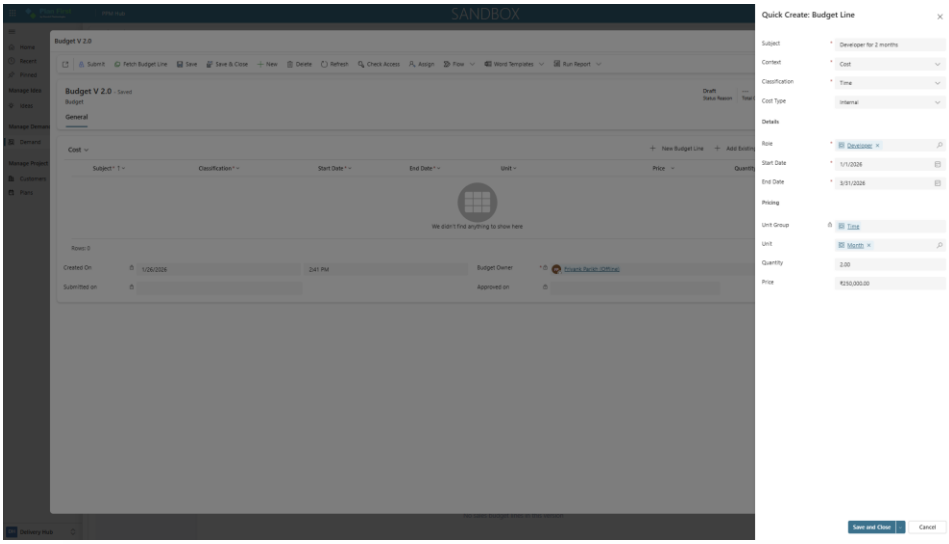

Plan First
PPM Hub
SANDBOX
Benefit Defined at Idea
Save
Save & Close
New
Deactivate
Delete
Refresh
Check Access
Assign
Flow
Word Templates
Run Report
Share
Benefit Defined at Idea - Saved
Benefit
1.00
Benefit Score
General
Form assist
Question
AI-based Sales Forecasting Phase 3
Est. Tangible Benefits
₹5,608,048.00
Actual Tangible Benefit
Est. Intangible Benefits
Improved compliance posture
Actual Intangible Benefits
Est. Realization Date
4/28/2026
Actual Realization Date
Edit
Activate
Deactivate
Delete Benefit Scoring
Criteria
Definition
Rating (1-5)
Achievability / Realism
Likelihood of achieving trget benefit (1=Low, 5=High)
Dependency Risk
Degree to which benefit depends on external factors (1=High risk, 5=Low risk)
1
Financial Impact
Expected monetary value or cost savings (1=Low, 5=High)
1
Stakeholder Value / Visibility
Perceived value to key stakeholders (1=Low, 5=High)
1
Strategic Alignment
How closely the benefit supports strategic objectives (1=Low, 5=High)
1
Sustainability / Longevity
How long the benefit will last (1=Short-lived, 5=Long-term)
1
Time to Realize
How soon benefit will be achieved (1=Long-term, 5=Quick win)
1
Rows: 7
Selected: 1

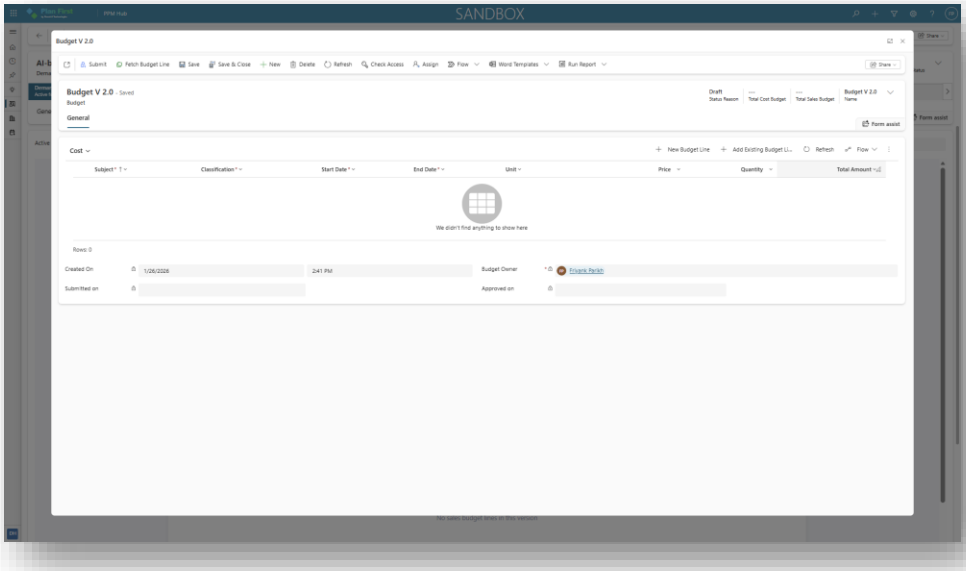
6. Budget Creation and Management

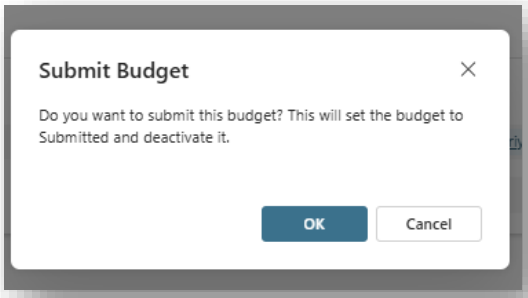
- Click 'Create Budget' to start budgeting process
- Add new budget lines for different cost or sales categories
- Switch between Sales Budget and Cost Budget views
- Update budget line details and amounts
- Save and Submit Budget for approval





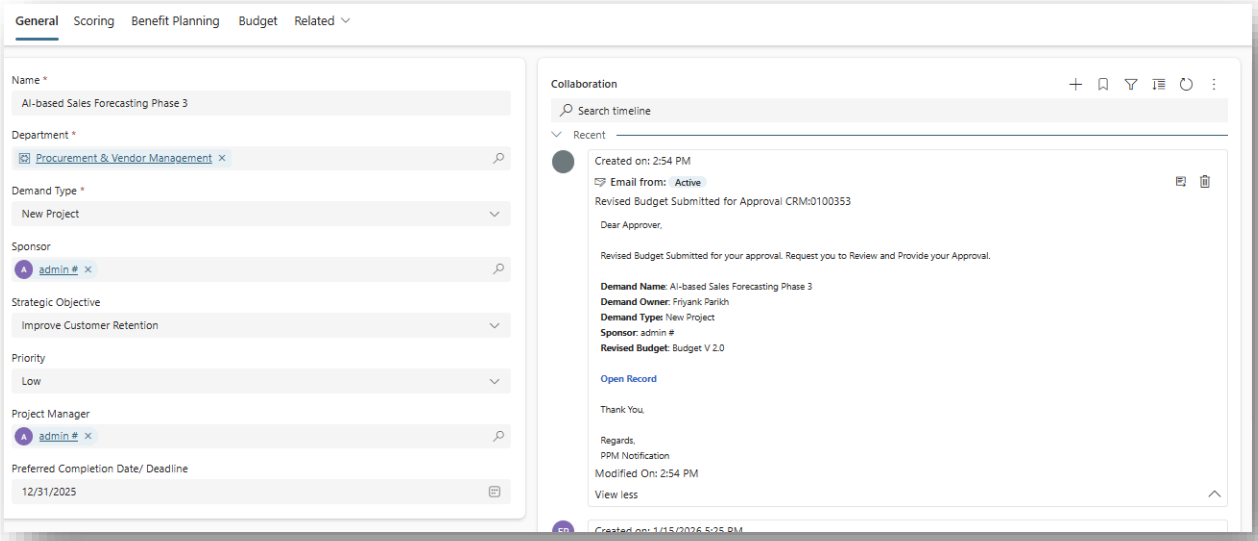

SANDBOX
Quick Create: Budget Line
Budget V 2.0
Budget V 2.0 - Saved
General
Cost
We didn't find anything to show here
Save and Close
Cancel

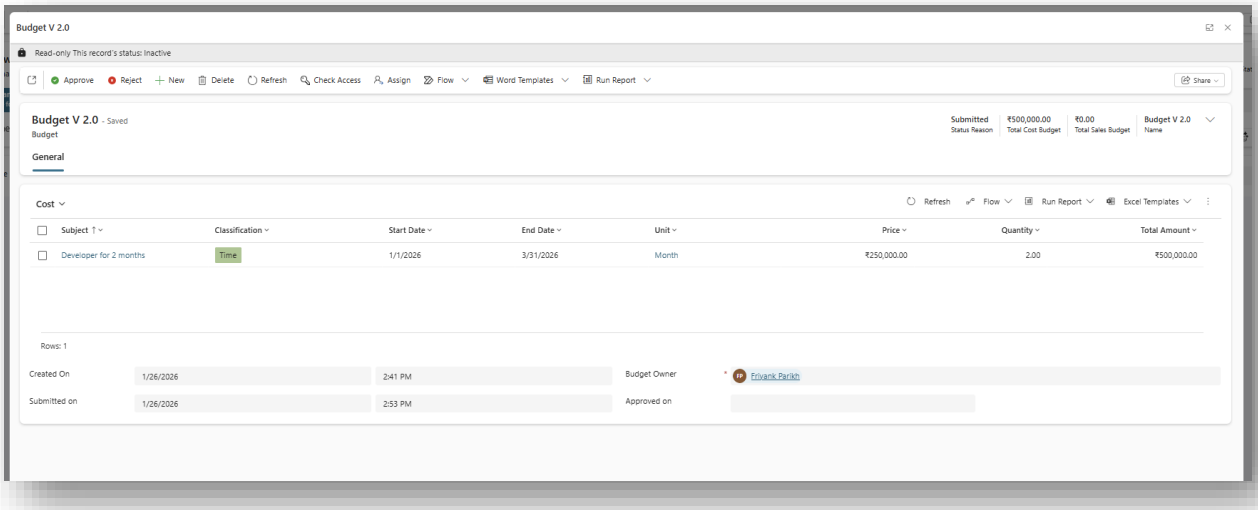

SANDBOX
Budget V 2.0
Budget V 2.0 - Saved
General
Cost
We didn't find anything to show here


Submit Budget
Do you want to submit this budget? This will set the budget to Submitted and deactivate it.
OK
Cancel

7. Budget Approval Process

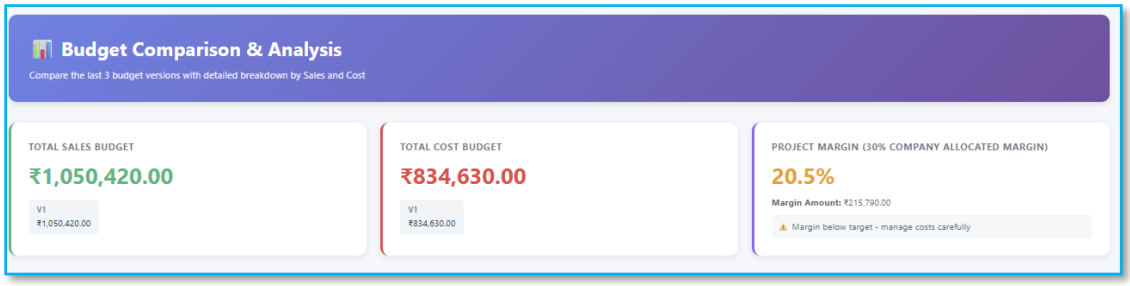
- Budget approver (defined in configuration) receives email notification
- Approver reviews all budget lines
- Approver can switch between Cost and Sales budgets for review
- System tracks dates from creation to approval
- Approver can Approve or Reject the budget

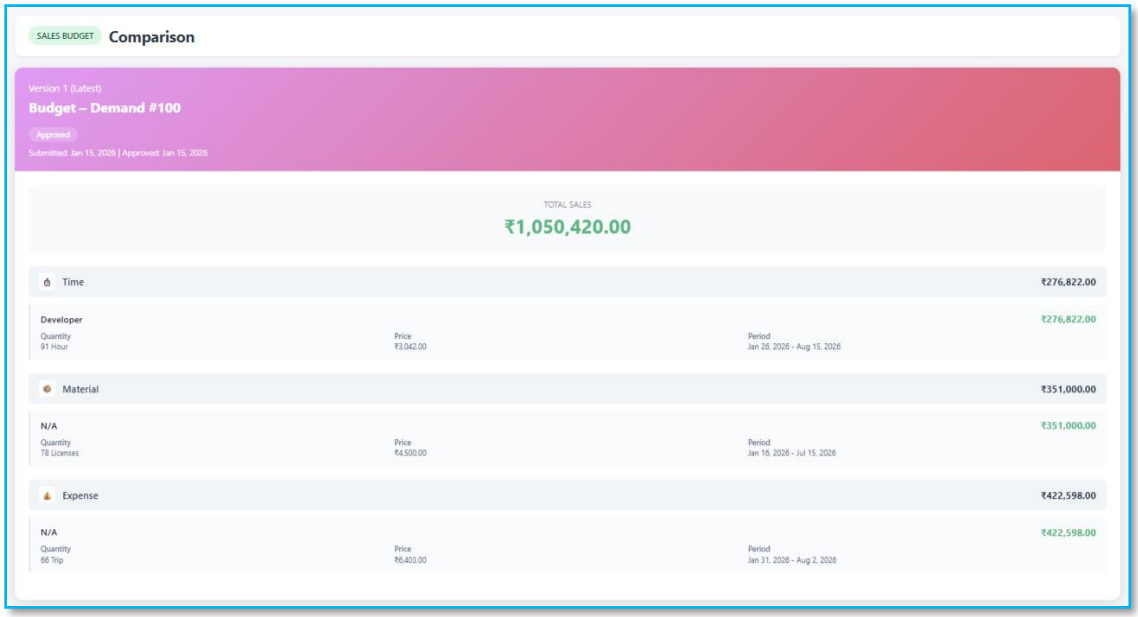


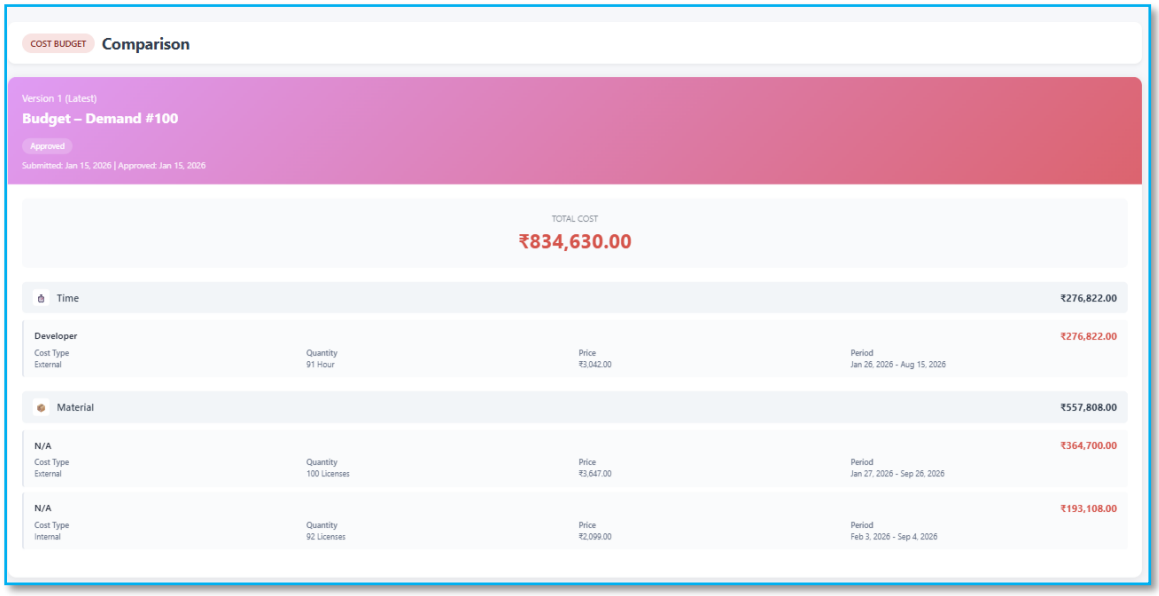


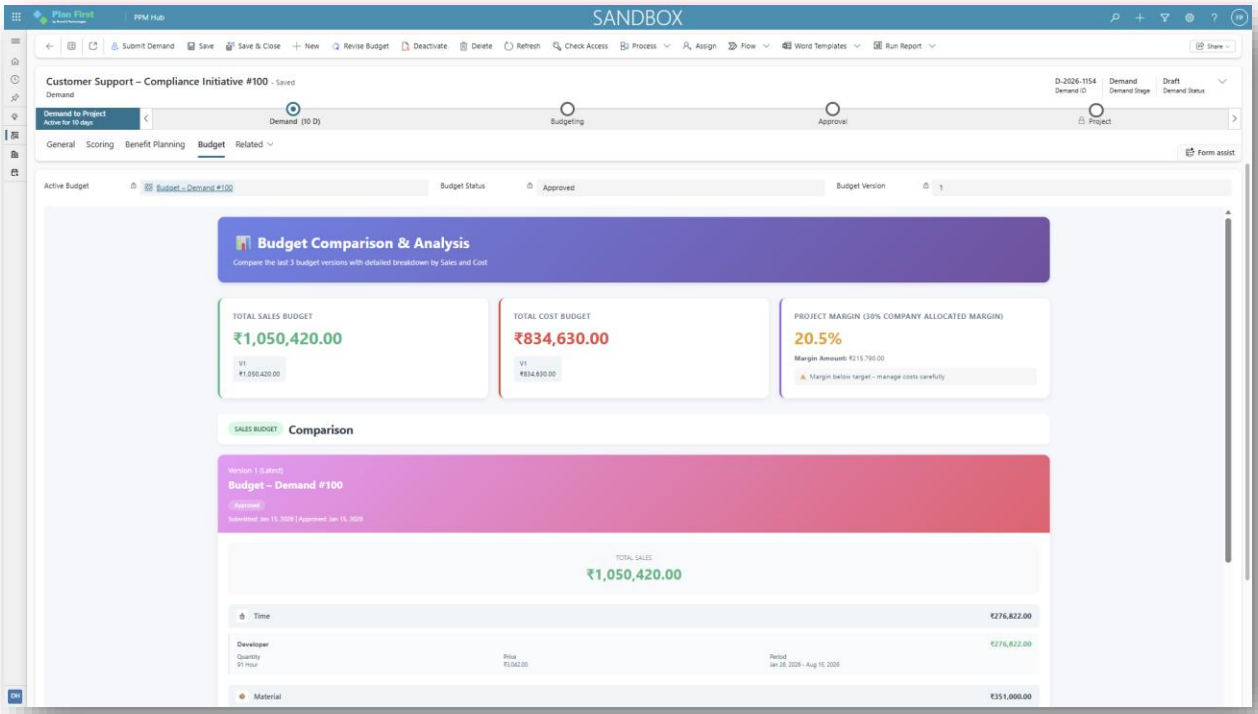
8. Budget Analysis and Comparison

- Review and compare Sales and Cost budgets side by side
- Track profit margin calculations automatically
- Compare different versions of budgets across time



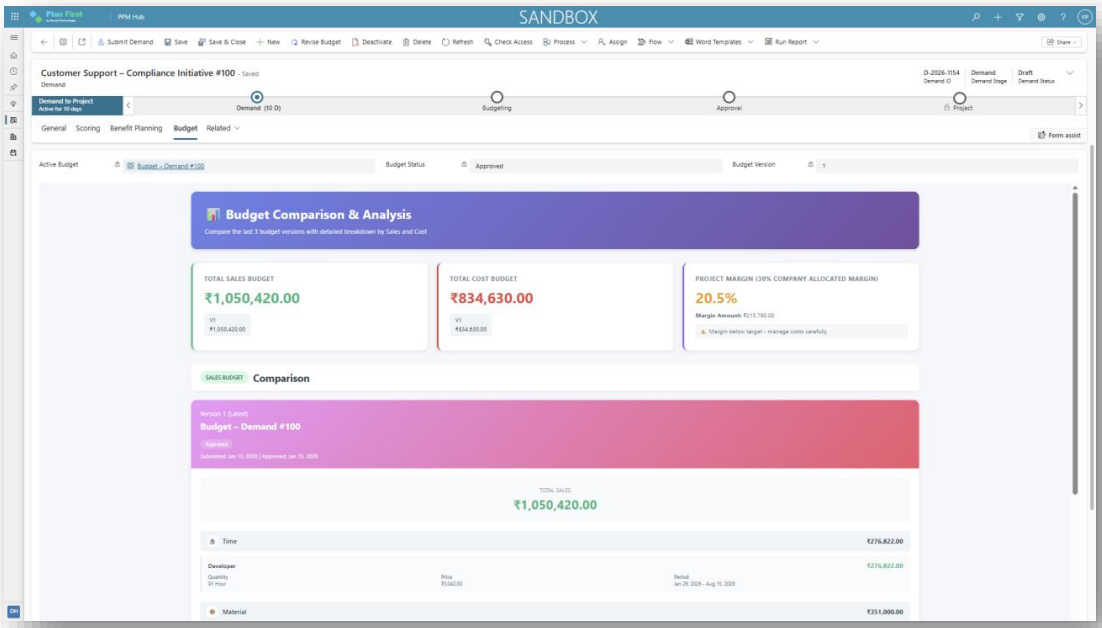


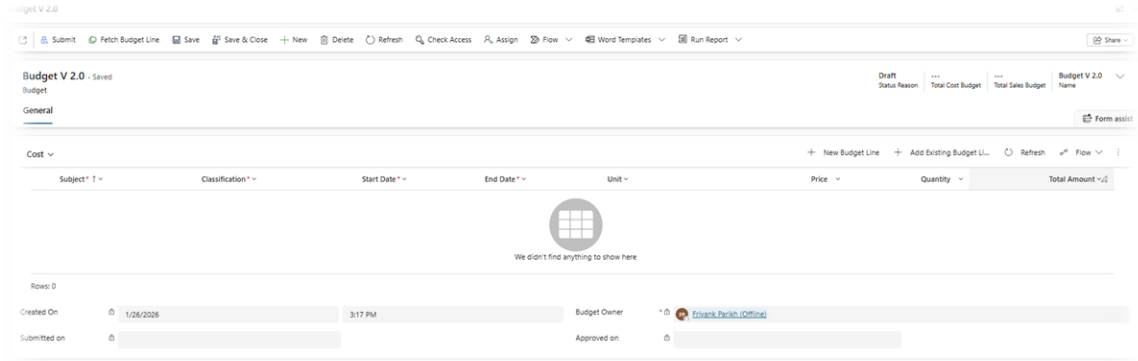


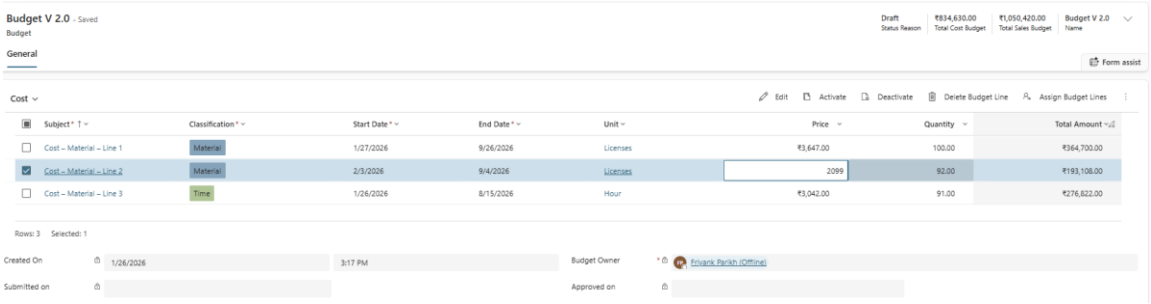

Plan First
PPM Hub
SANDBOX
Submit Demand
Save
Save & Close
New
Revise Budget
Deactivate
Delete
Refresh
Check Access
Process
Assign
Flow
Word Templates
Run Report
Share
Customer Support – Compliance Initiative #100 - Saved
Demand
D-2026-1154
Demand ID
Demand
Demand Stage
Draft
Demand Status
Demand to Project
Active for 10 days
Demand (10 D)
Budgeting
Approval
Project
General
Scoring
Benefit Planning
Budget
Related
Form assist
Active Budget
Budget – Demand #100
Budget Status
Approved
Budget Version
1
Budget Comparison & Analysis
Compare the last 3 budget versions with detailed breakdown by Sales and Cost
TOTAL SALES BUDGET
₹1,050,420.00
V1
₹1,050,420.00
TOTAL COST BUDGET
₹834,630.00
V1
₹834,630.00
PROJECT MARGIN (30% COMPANY ALLOCATED MARGIN)
20.5%
Margin Amount: ₹215,790.00
Margin below target – manage costs carefully
SALES BUDGET
Comparison
Version 1 (Latest)
Budget – Demand #100
Approved
Submitted: Jan 15, 2026 | Approved: Jan 15, 2026
TOTAL SALES
₹1,050,420.00
Time
₹276,822.00
Developer
₹276,822.00
Quantity
91 Hour
Price
₹3,042.00
Period
Jan 26, 2026 - Aug 15, 2026
Material
₹351,000.00

9. Budget Revision Process

- Click 'Revise Budget' to create a new version
- System automatically updates version number
- Fetch budget lines from previous approved budget (auto-populated)
- Update budget lines as needed
- Submit revised budget for approval

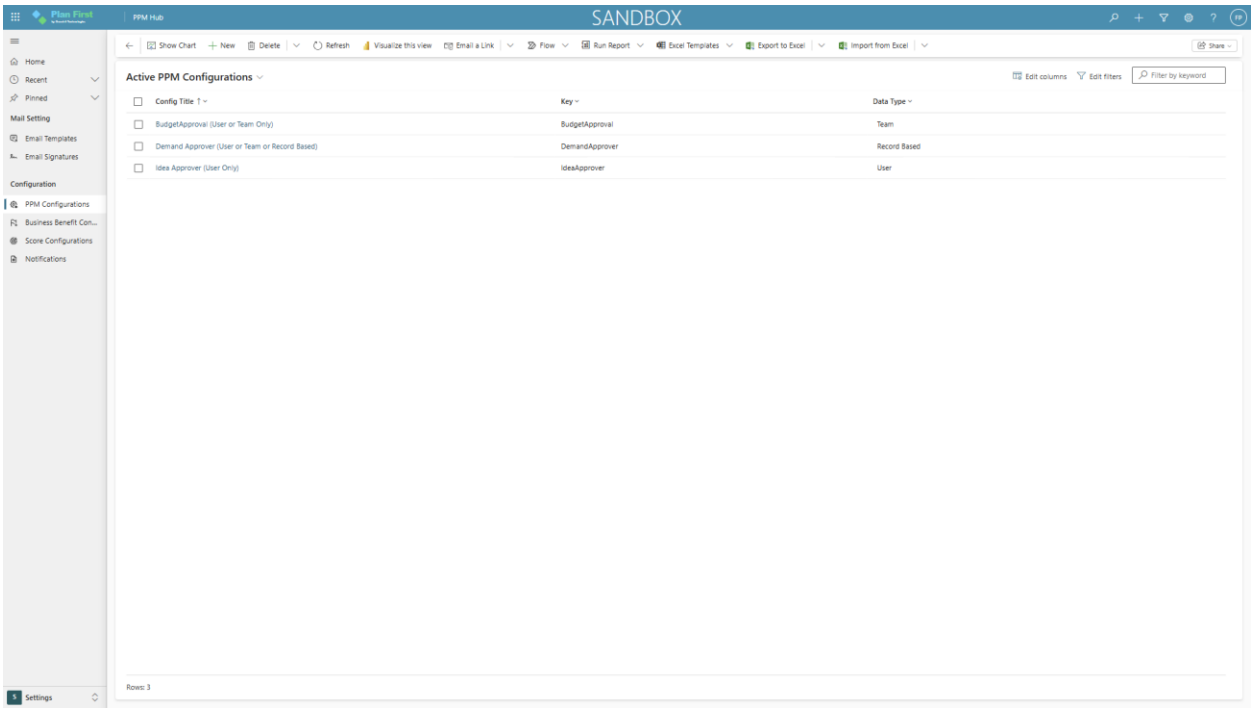


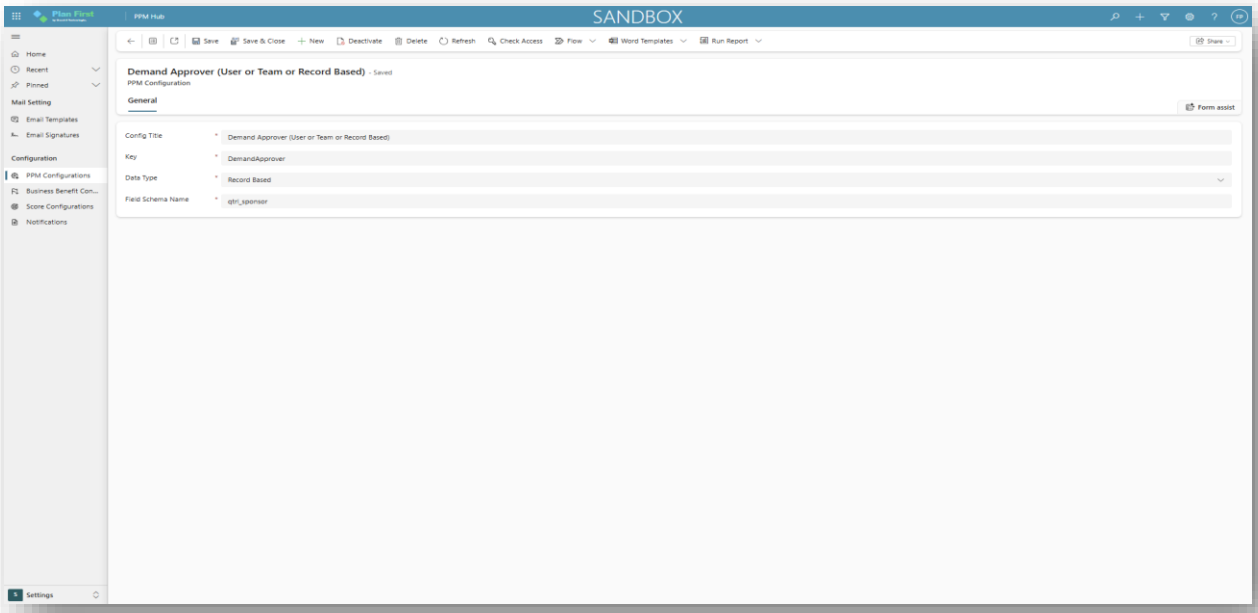




10. Configuring Demand Approval

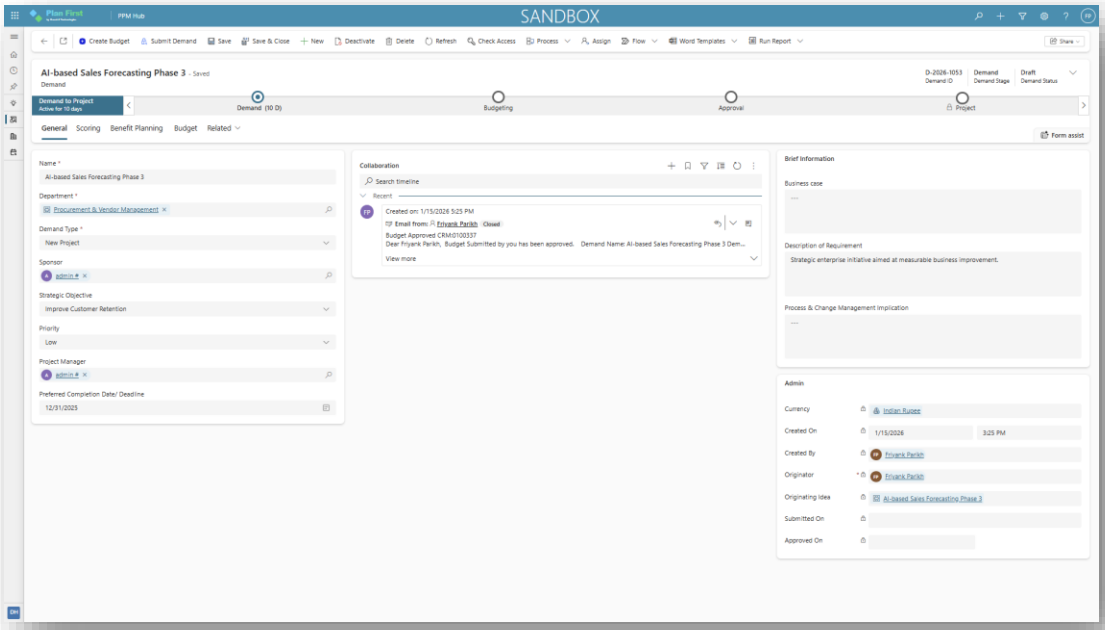
- Switch to Settings and access Demand Approval Config
- Configure approver as: Single User, Field-Based, or Team-Based
- Specify field from which approver information will be retrieved

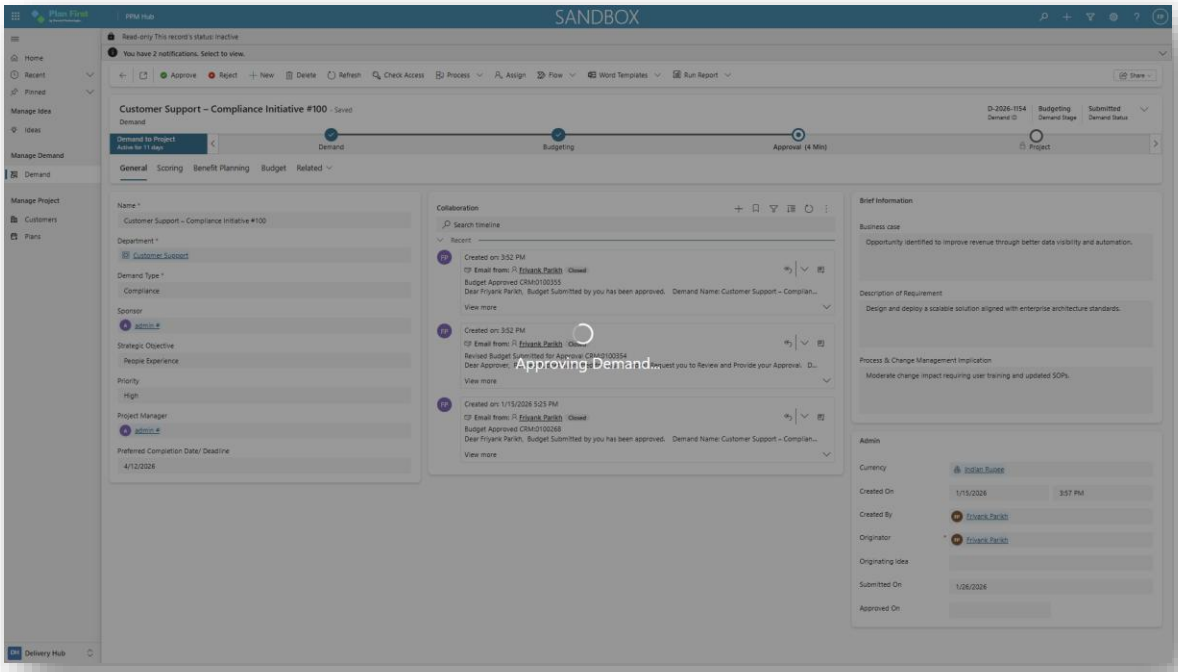




11. Demand Submission and Approval

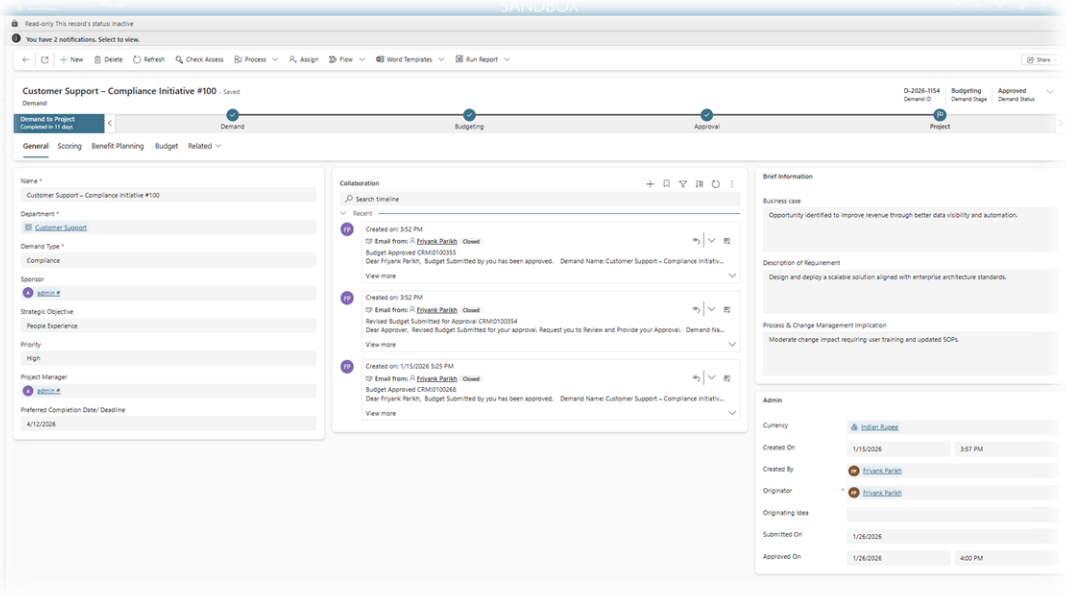
- Track all emails and activities related to the demand
- Review the originating idea if applicable
- Submit Demand for final approval
- Approver receives notification and can Approve or Reject

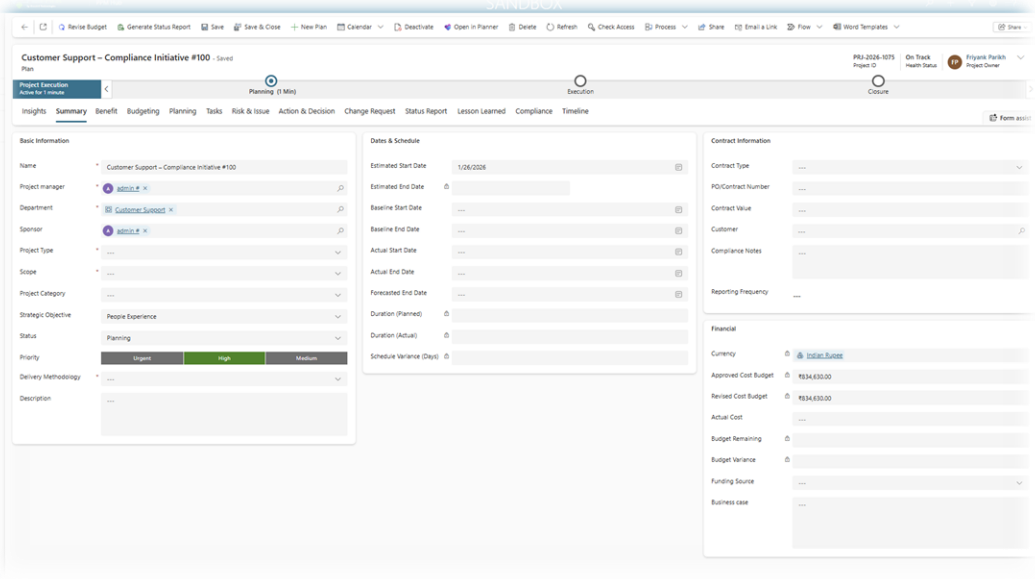




12. Conversion to Project

- Approved demands automatically convert to Projects/Plans
- All relevant data is prefilled in the new project
- Benefit scores carry over from demand to project
- Budget information transfers to project budget





Module 3: Project Management

Overview

Project Management is the execution engine of Plan First PPM. It provides comprehensive tools for planning, executing, monitoring, and closing projects. The module includes task management with multiple views (list, Kanban, timeline), team collaboration, risk and issue tracking, and integrated budget management with version control.

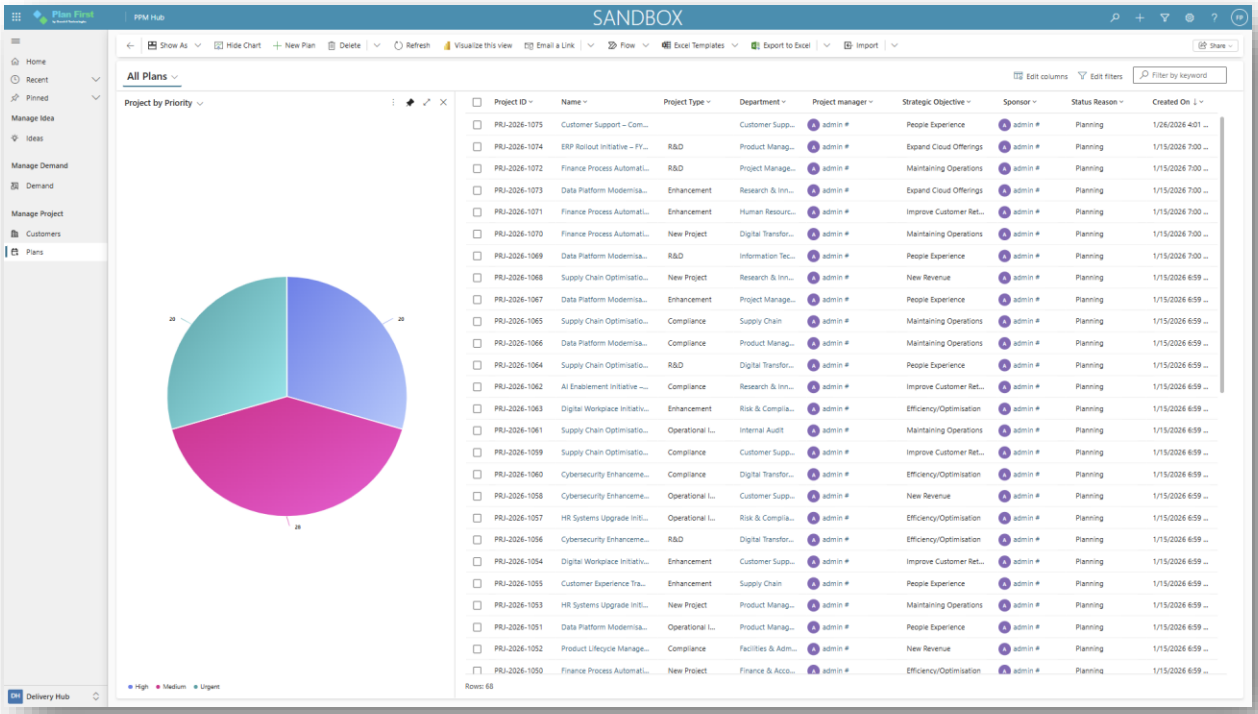
Key Features

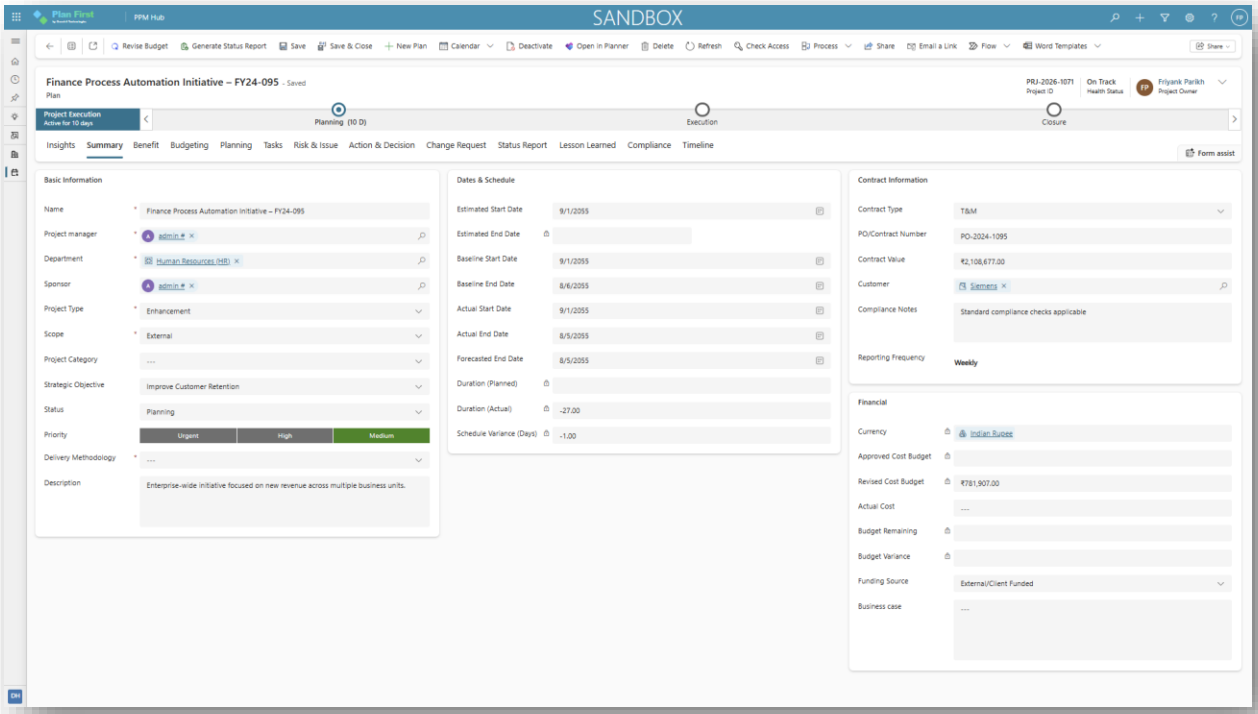
- Multi-view task management: List, Kanban, Timeline (Gantt)
- Team member management with role assignments
- Task dependencies and baseline tracking
- Visual insights by status, progress, and effort
- Integrated risk, issue, action, and decision management
- Change request workflow
- Lessons learned capture
- Project closure audit and documentation

Step-by-Step Process

1. Project Setup

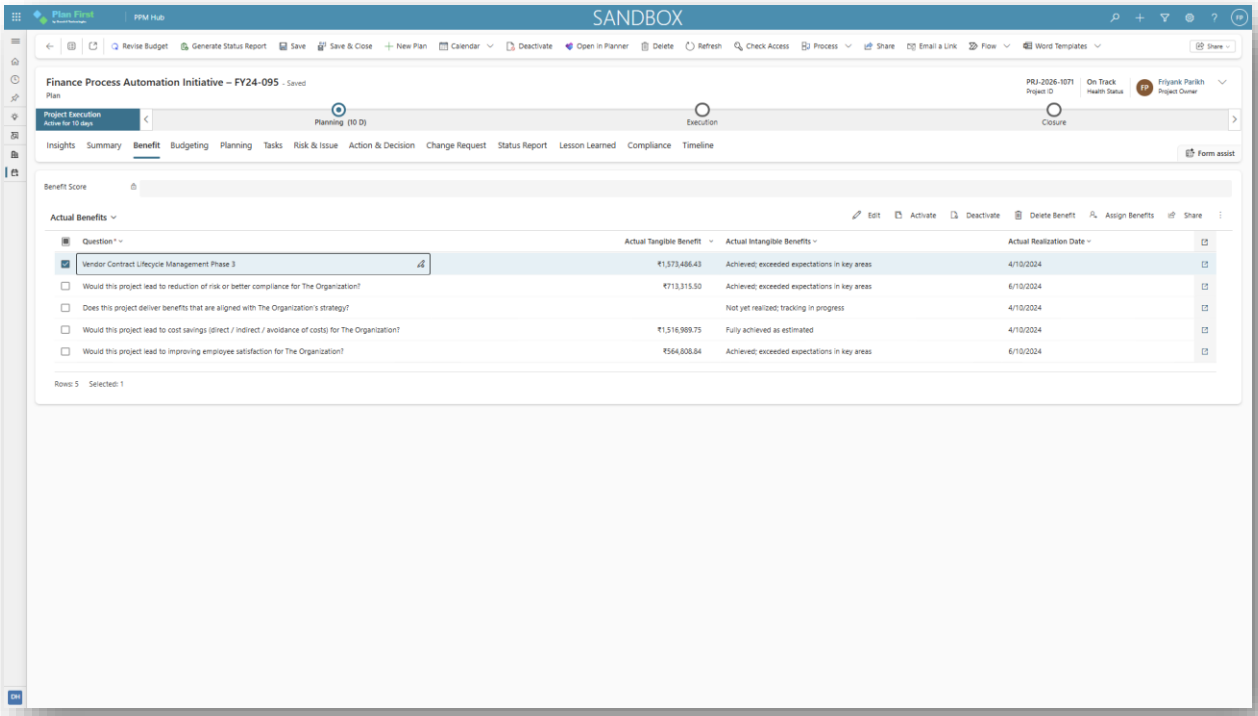
- Access projects from the main dashboard
- Use show/hide charts to customize view
- Change views and chart types as needed
- Click 'Create New' or open existing project record
- Fill in all required project fields





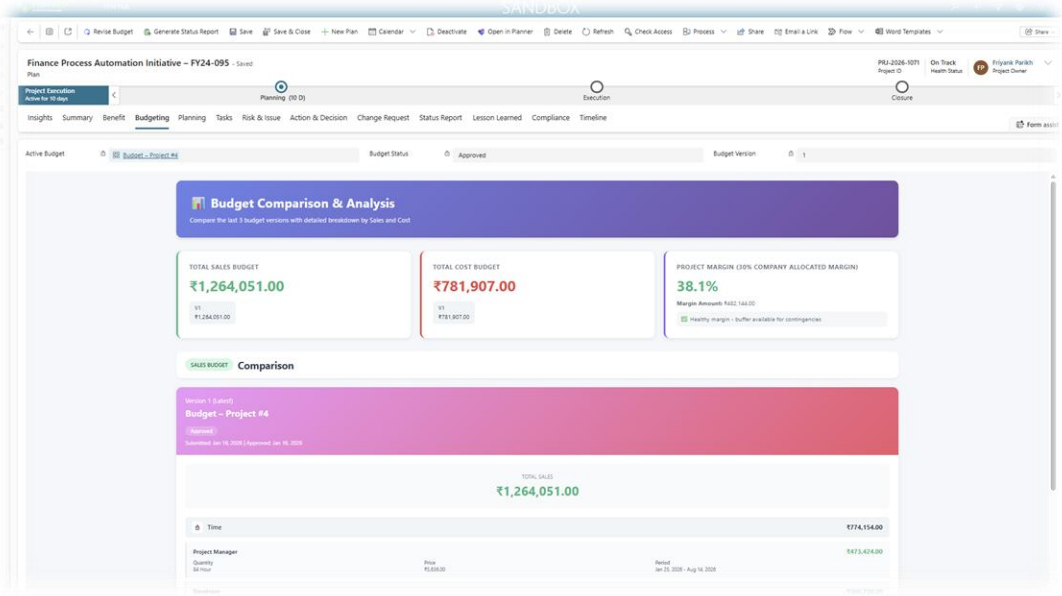
2. Benefits Management

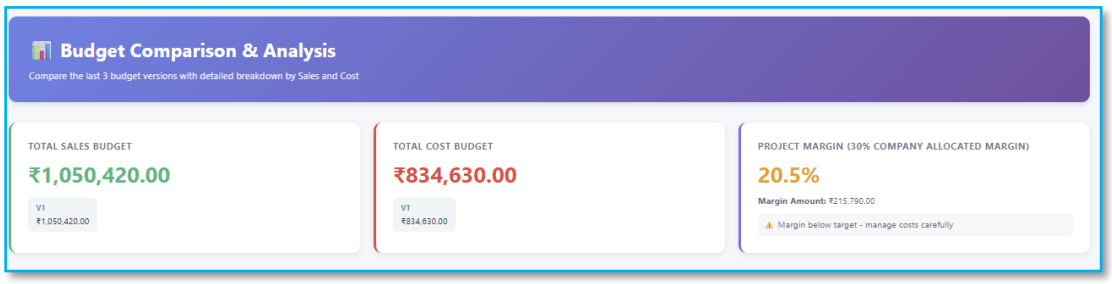
- Update or create new benefits for the project
- Specify actual target values
- Classify as tangible or intangible
- Update actual realization dates



3. Project Budget Management

- Create or revise budget at project level
- Review and compare Sales and Cost budgets
- Track profit margins automatically
- Compare different budget versions





SALES BUDGET **Comparison**

Version 1 (Latest)

Budget – Demand #100

Approved

Submitted: Jan 15, 2026 | Approved: Jan 15, 2026

TOTAL SALES

₹1,050,420.00

Time			₹276,822.00
Developer			₹276,822.00
Quantity 91 Hour	Price ₹3,042.00	Period Jan 26, 2026 - Aug 15, 2026	
Material			₹351,000.00
N/A			₹351,000.00
Quantity 78 Licenses	Price ₹4,500.00	Period Jan 16, 2026 - Jul 15, 2026	
Expense			₹422,598.00
N/A			₹422,598.00
Quantity 66 Trip	Price ₹6,403.00	Period Jan 31, 2026 - Aug 2, 2026	

COST BUDGET **Comparison**

Version 1 (Latest)

Budget – Demand #100

Approved

Submitted: Jan 15, 2026 | Approved: Jan 15, 2026

TOTAL COST

₹834,630.00

Time				₹276,822.00
Developer				₹276,822.00
Cost Type External	Quantity 91 Hour	Price ₹3,042.00	Period Jan 26, 2026 - Aug 15, 2026	
Material				₹557,808.00
N/A				₹364,700.00
Cost Type External	Quantity 100 Licenses	Price ₹3,647.00	Period Jan 27, 2026 - Sep 26, 2026	
N/A				₹193,108.00
Cost Type Internal	Quantity 92 Licenses	Price ₹2,099.00	Period Feb 3, 2026 - Sep 4, 2026	

SALES BUDGET **Comparison**

Version 2 (Latest)
Budget V 2.0
Draft

TOTAL SALES
₹1,050,420.00

Time	₹276,822.00
Developer	₹276,822.00
Quantity: 91 Hour · Price: ₹3,042.00 · Period: Jan 26, 2026 - Aug 15, 2026	
Material	₹351,000.00
N/A	₹351,000.00
Quantity: 78 Licenses · Price: ₹4,500.00 · Period: Jan 16, 2026 - Jul 15, 2026	
Expense	₹422,598.00
N/A	₹422,598.00
Quantity: 66 Trip · Price: ₹6,403.00 · Period: Jan 31, 2026 - Aug 2, 2026	

Version 1
Budget – Demand #100
Approved
Submitted: Jan 15, 2026 | Approved: Jan 15, 2026

TOTAL SALES
₹1,050,420.00

Time	₹276,822.00
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Version 2 (Latest)
Budget V 2.0
Draft

TOTAL COST
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Cost Type: Internal · Quantity: 92 Licenses · Price: ₹2,099.00 · Period: Feb 3, 2026 - Sep 4, 2026	

Version 1
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Approved
Submitted: Jan 15, 2026 | Approved: Jan 15, 2026

TOTAL COST
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Time	₹276,822.00
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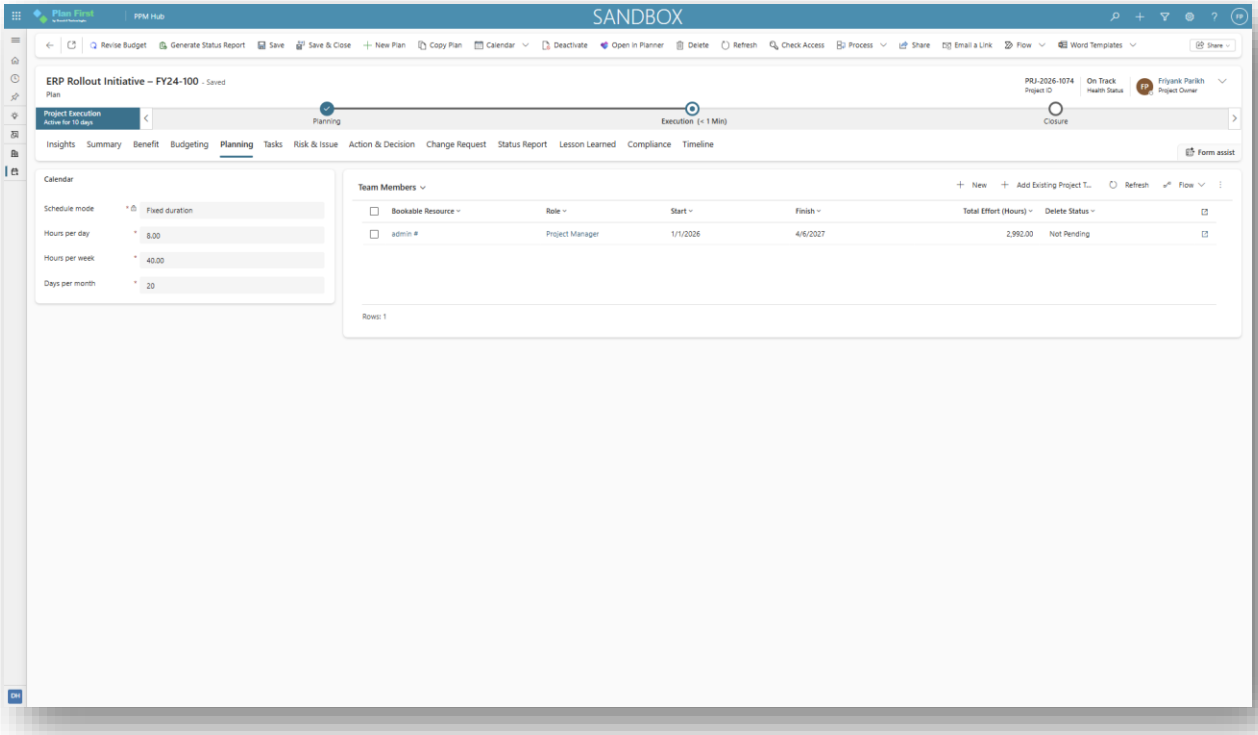
Cost Type: External · Quantity: 100 Licenses · Price: ₹3,647.00 · Period: Jan 27, 2026 - Sep 26, 2026	
N/A	₹193,108.00
Cost Type: Internal · Quantity: 92 Licenses · Price: ₹2,099.00 · Period: Feb 3, 2026 - Sep 4, 2026	

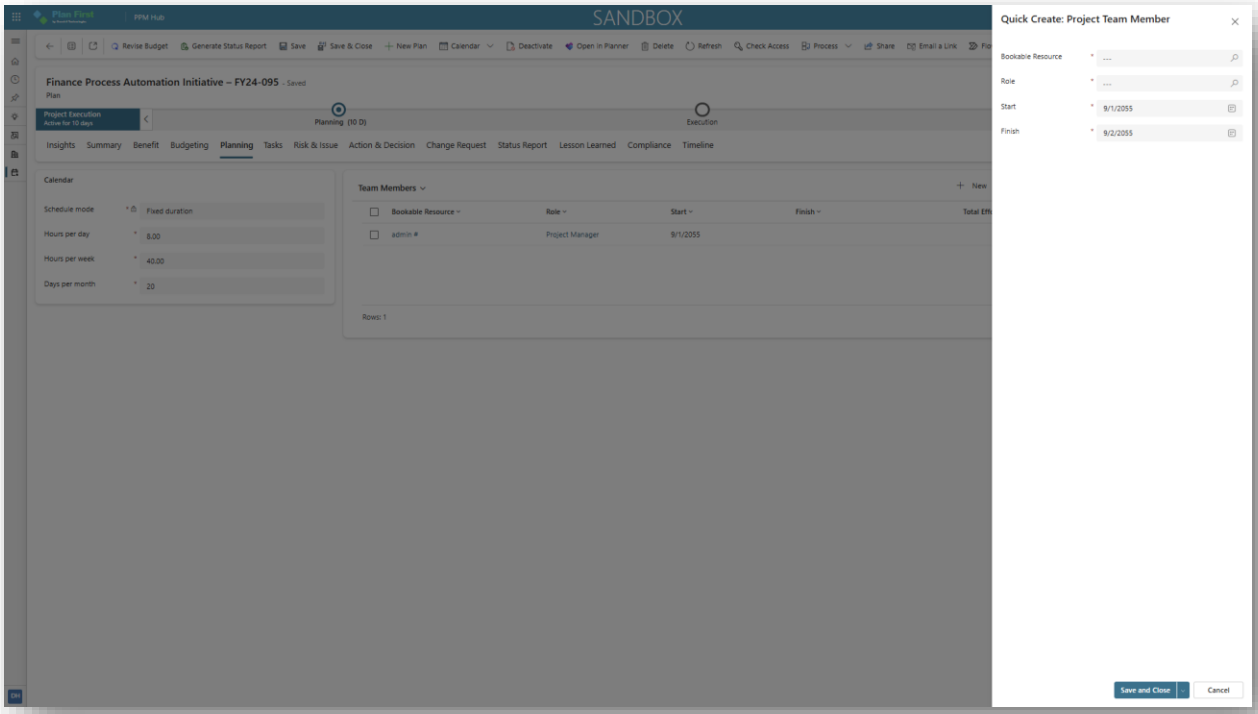
4. Moving to Execution Stage

- Change project stage to 'Execution' to begin work



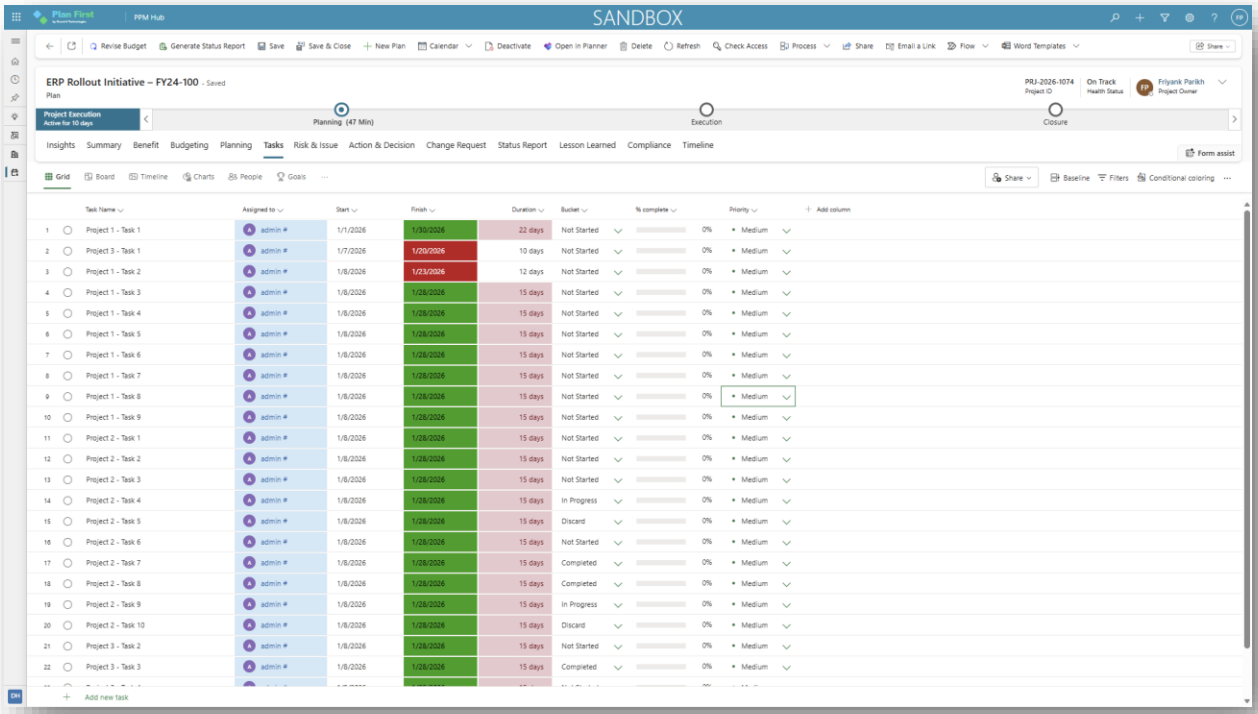
5. Team Management

- Click 'Add Team Member'
- Select resource from available pool
- Assign appropriate role
- Save team member assignment



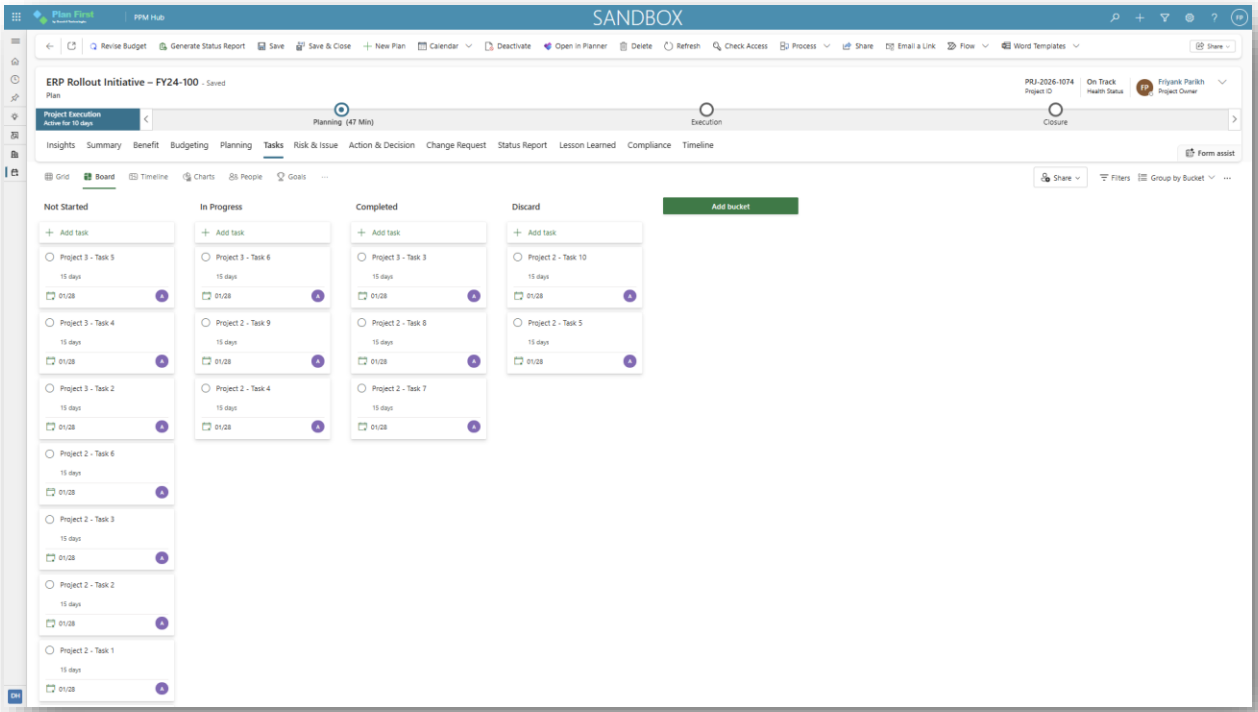
6. Task Management - List View

- Click 'Add Tasks' to create new tasks
- Update task name, assignee, start date, and end date
- Set baseline for tracking progress
- Use filters to manage task visibility



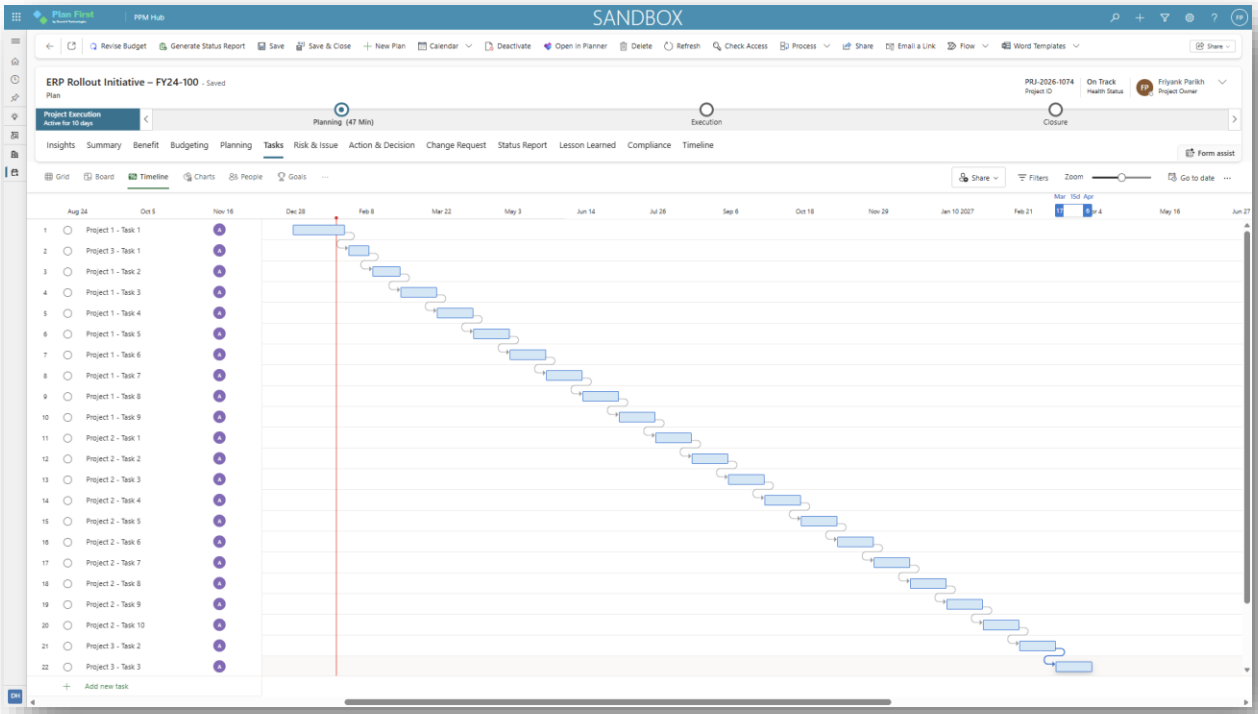
7. Task Management - Kanban View

- Switch to Kanban board view
- Group tasks by Status, Progress, Assignee, or other fields
- Drag and drop tasks between columns for visual planning



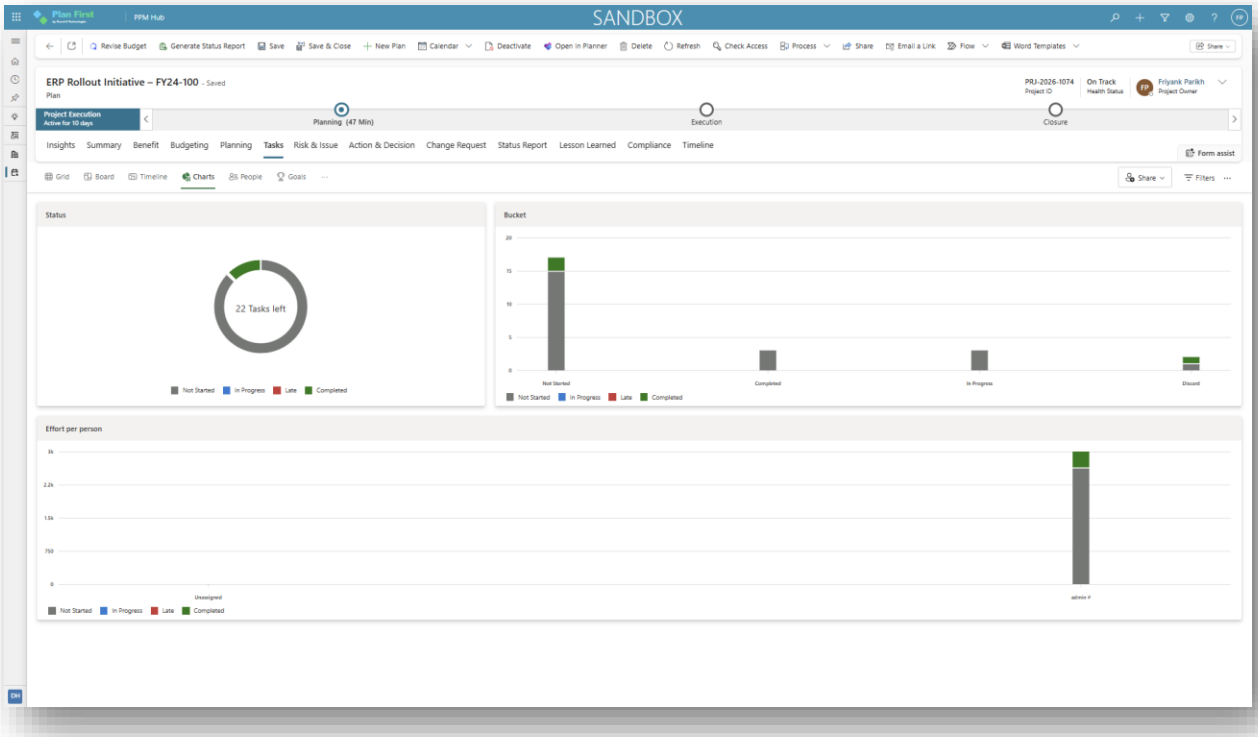
8. Task Management - Timeline View

- View tasks in timeline (Gantt chart) format
- Zoom in or zoom out for different time perspectives
- Apply filters to focus on specific tasks
- Modify task dependencies directly on timeline



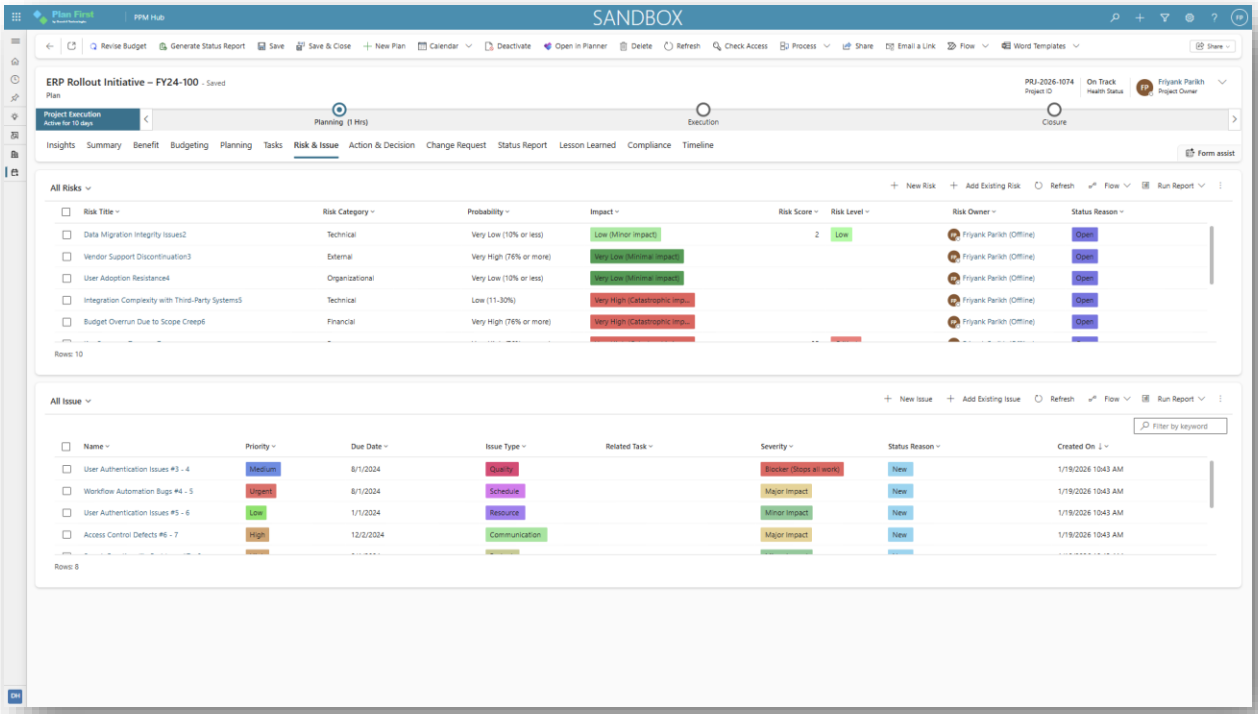
9. Project Insights

- View insights showing task distribution by status
- Analyse tasks by bucket categories
- Review effort distribution across the project



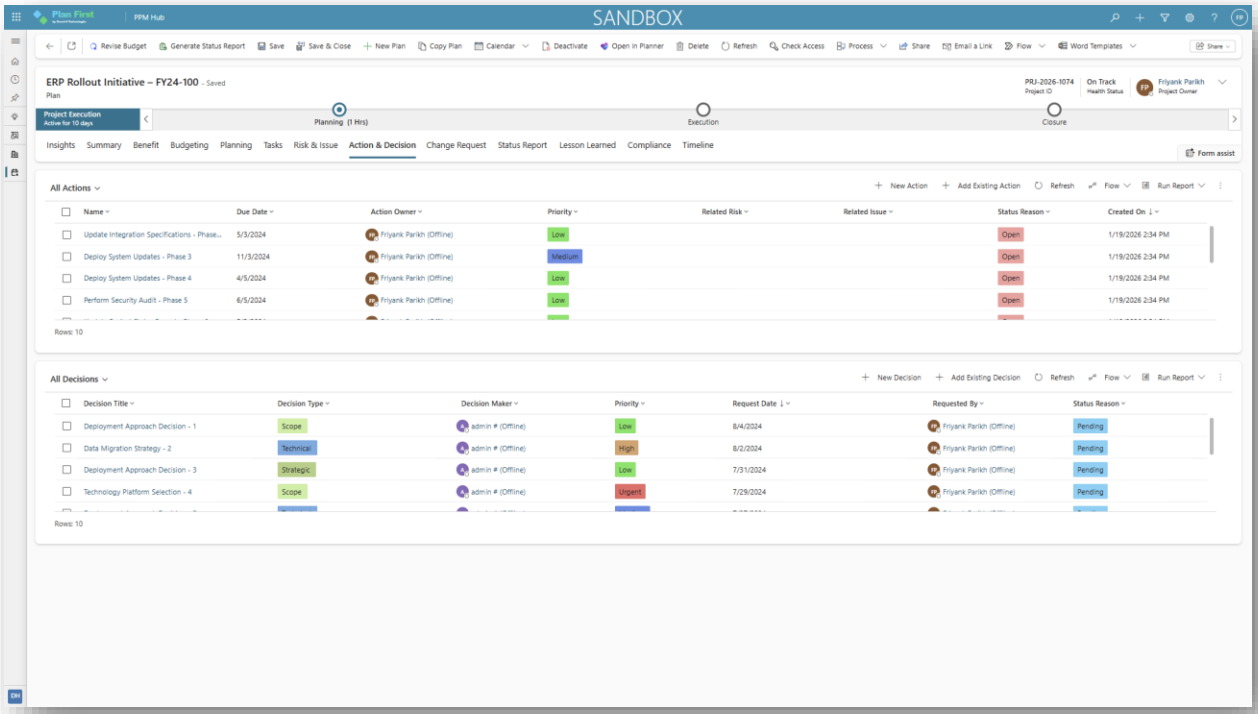
10. Risk and Issue Management

- Create project risks to track potential problems
- Create project issues to document actual problems



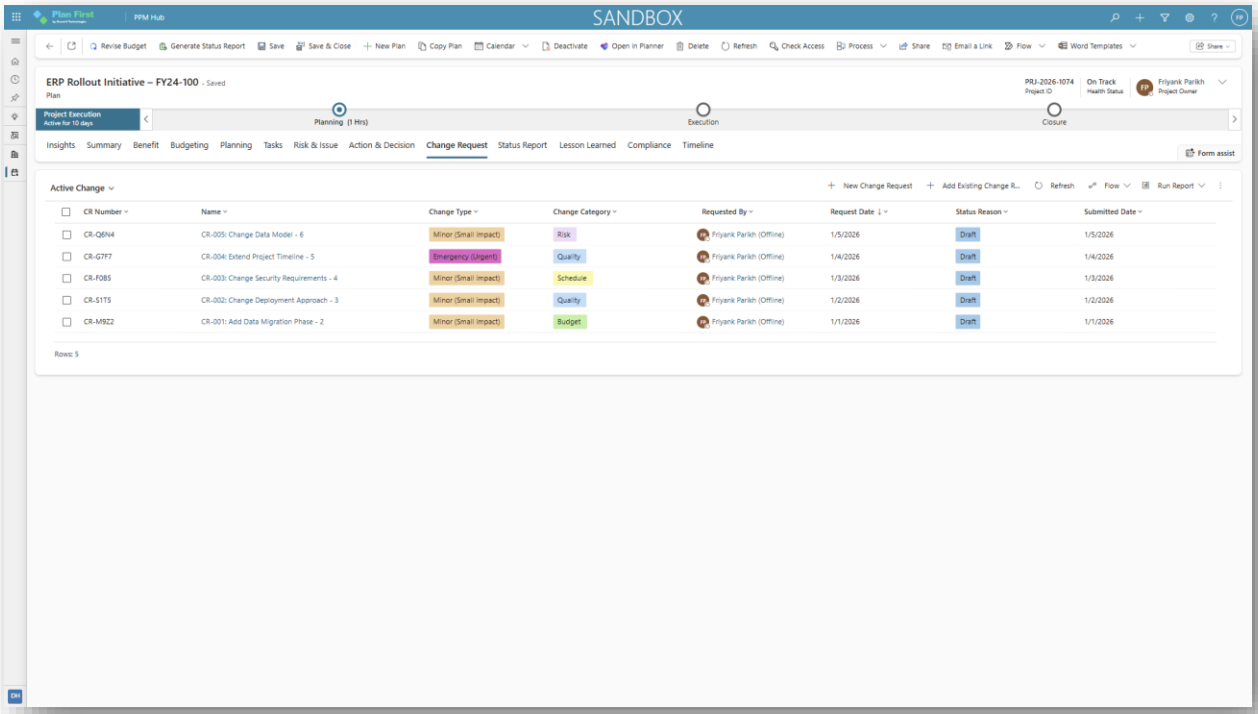
11. Actions and Decisions

- Create project actions to track follow-up items
- Create project decisions to document key choices



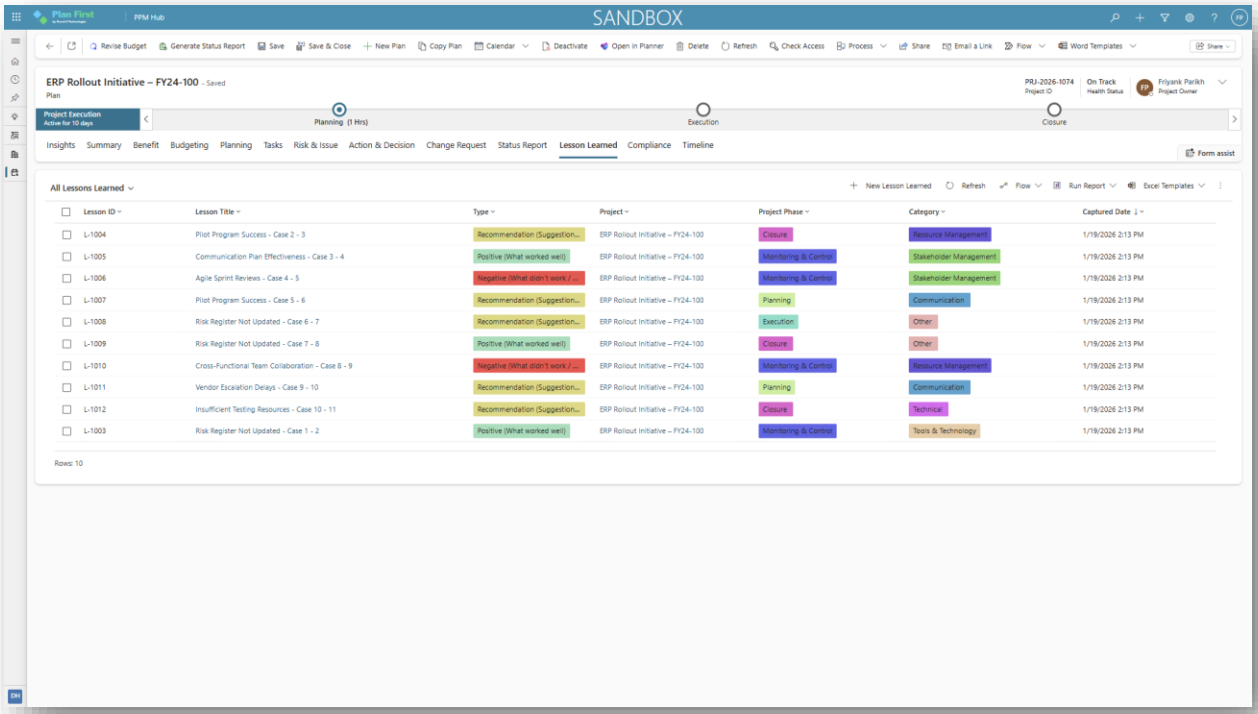
12. Change Management

- Create project change requests to manage scope changes



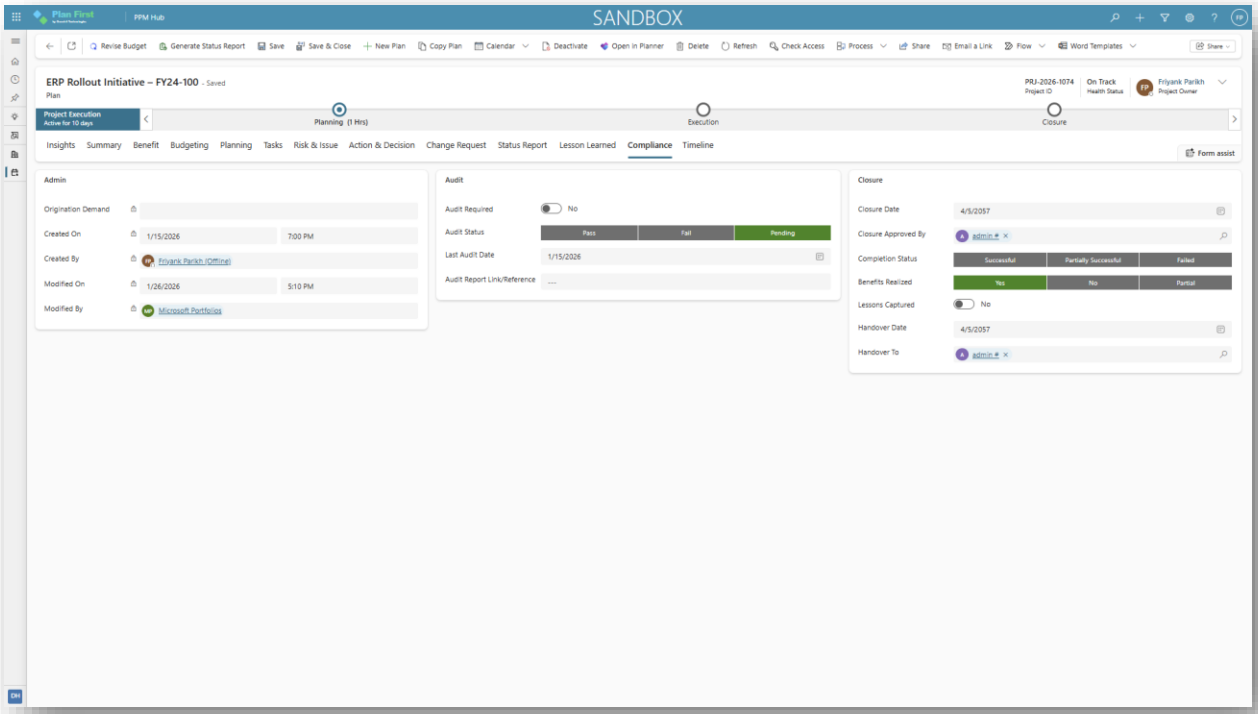
13. Knowledge Capture

- Create project lessons learned to document insights



14. Project Closure

- View project dates timeline
- Update audit values
- Complete project closure values for final documentation


Plan First
PPM Hub
SANDBOX
Revise Budget
Generate Status Report
Save
Save & Close
New Plan
Copy Plan
Calendar
Deactivate
Open in Planner
Delete
Refresh
Check Access
Process
Share
Email a Link
Flow
Word Templates
Share
ERP Rollout Initiative – FY24-100 - Saved
Plan
PRJ-2026-1074
Project ID
On Track
Health Status
Friyank Parikh
Project Owner
Project Execution
Active for 10 days
Planning (1 Hrs)
Execution
Closure
Insights
Summary
Benefit
Budgeting
Planning
Tasks
Risk & Issue
Action & Decision
Change Request
Status Report
Lesson Learned
Compliance
Timeline
Form assist
Admin
Origination Demand
Created On
1/15/2026
7:00 PM
Created By
Friyank Parikh (Offline)
Modified On
1/26/2026
5:10 PM
Modified By
Microsoft Portfolios
Audit
Audit Required
No
Audit Status
Pass
Fail
Pending
Last Audit Date
1/15/2026
Audit Report Link/Reference
Closure
Closure Date
4/5/2057
Closure Approved By
admin #
Completion Status
Successful
Partially Successful
Failed
Benefits Realized
Yes
No
Partial
Lessons Captured
No
Handover Date
4/5/2057
Handover To
admin #

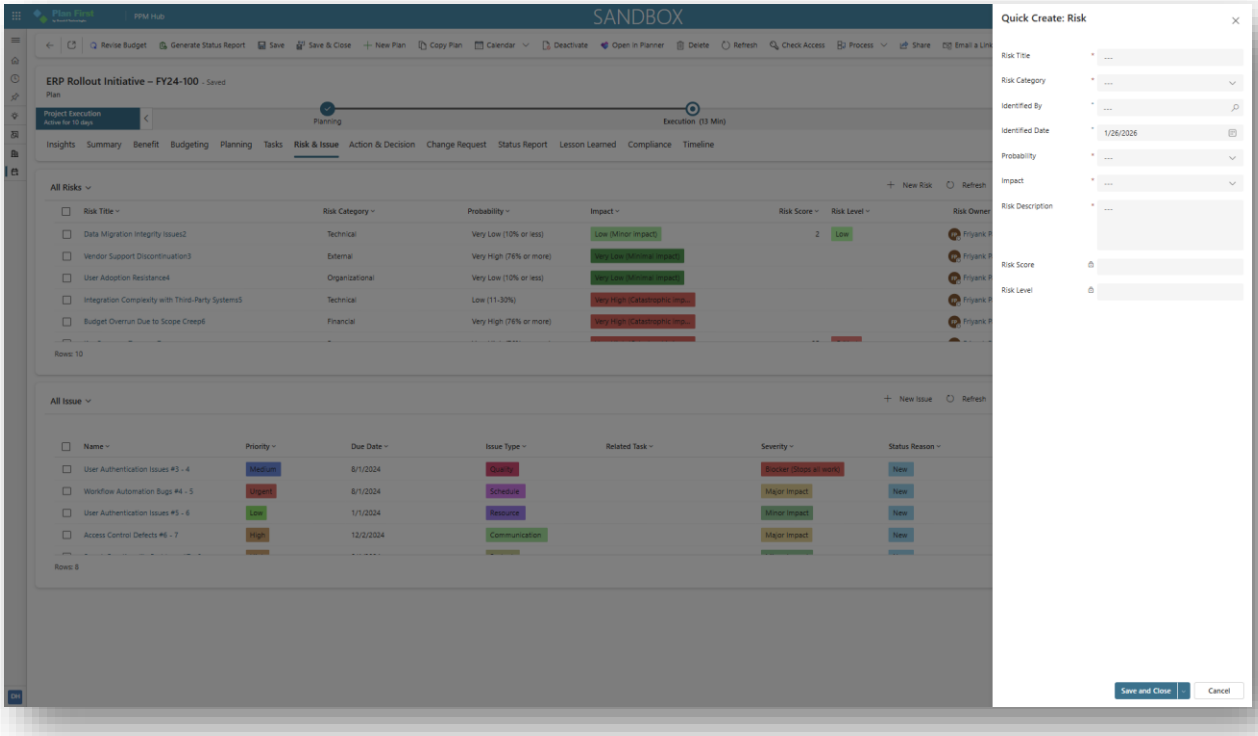
Module 4: Risk Management

Overview

Risk Management enables proactive identification and mitigation of project risks. The module supports comprehensive risk documentation including probability, impact, and response strategies.

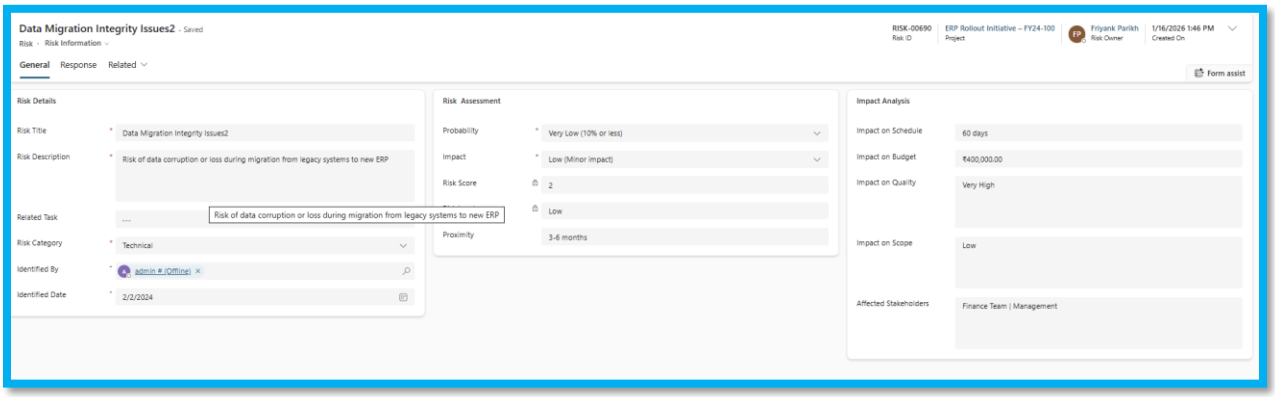
Creating Risks

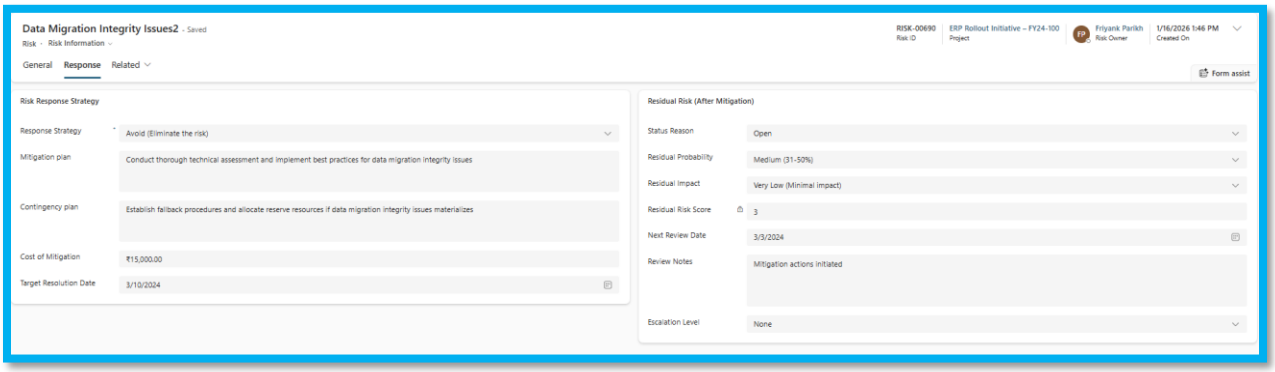
- Navigate to Risk Management
- Create and save new risk
- Fill in risk details



Managing Risks

- Modify and update basic risk information
- Update response information and mitigation strategies





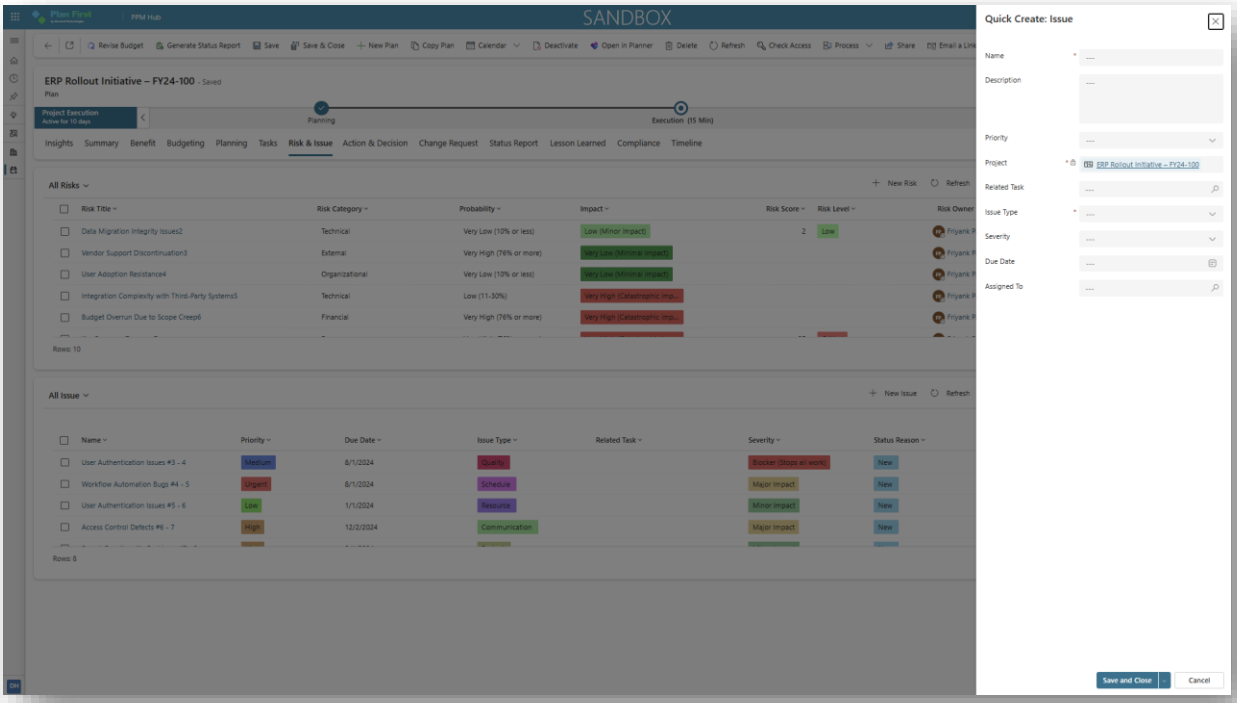
Module 5: Issue Management

Overview

Issue Management tracks and resolves actual problems that arise during project execution. Issues can be linked to actions for resolution tracking.

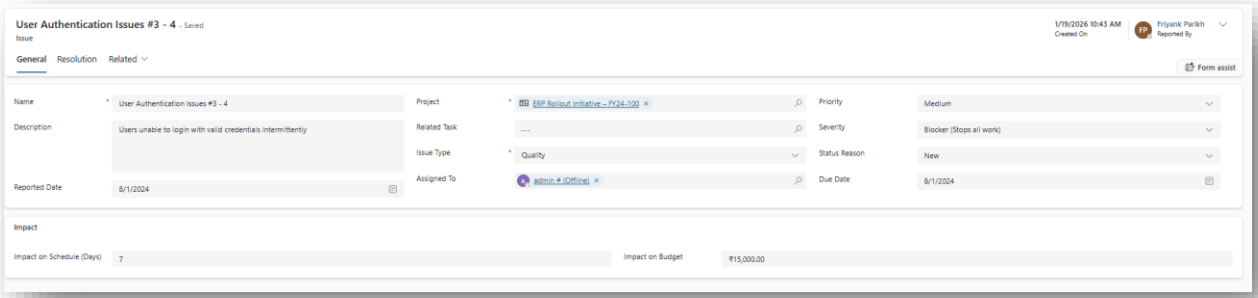
Creating Issues

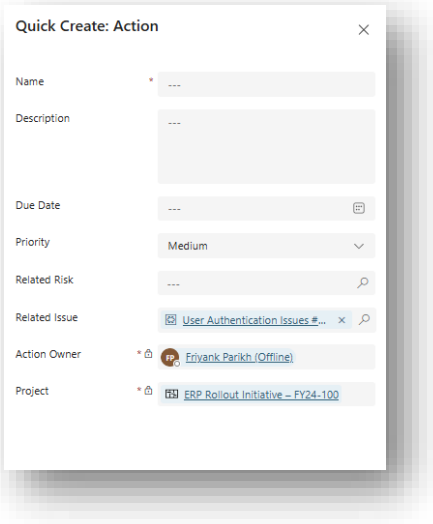
- Navigate to Issue Management
- Create and save new issue



Managing Issues

- Update issue details
- Document issue resolution details
- Add actions linked to current issues for tracking




Quick Create: Action
Name

Description

Due Date

Priority
Medium
Related Risk

Related Issue
User Authentication Issues #...
Action Owner
Priyank Parikh (Offline)
Project
ERP Rollout Initiative – FY24-100

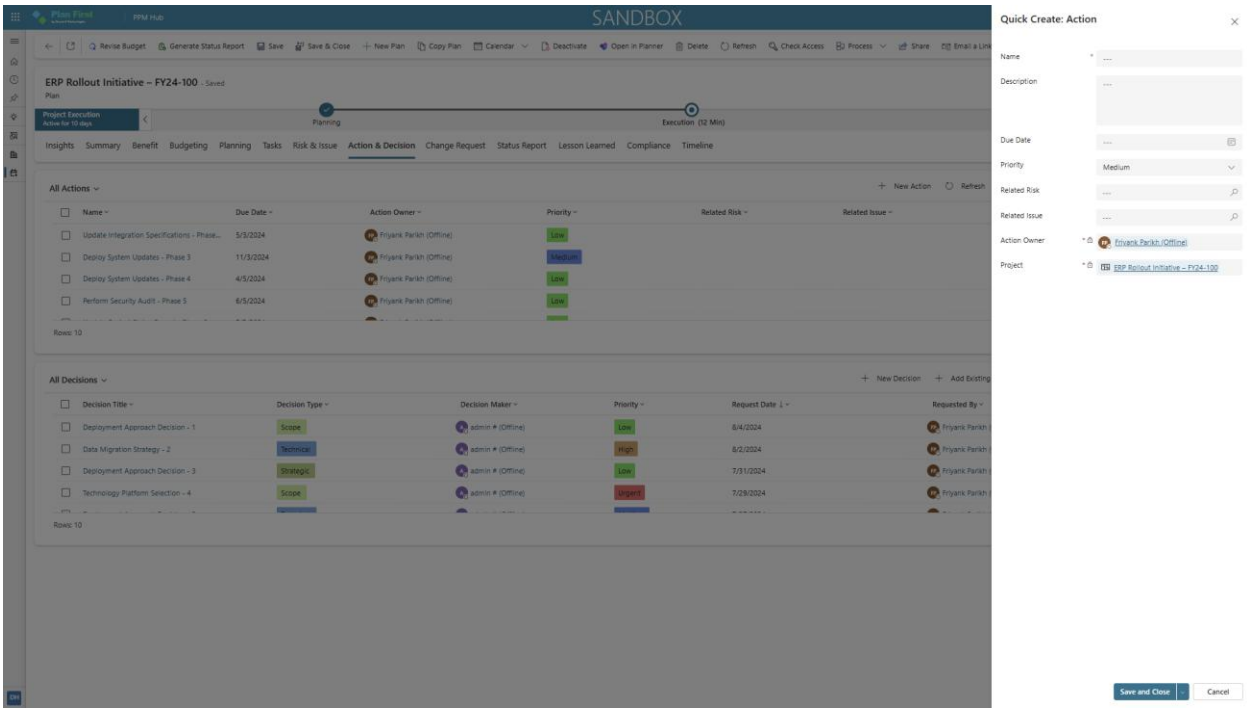
Module 6: Action Management

Overview

Action Management tracks follow-up items and tasks that need to be completed. Actions can be created independently or linked to issues for resolution tracking.

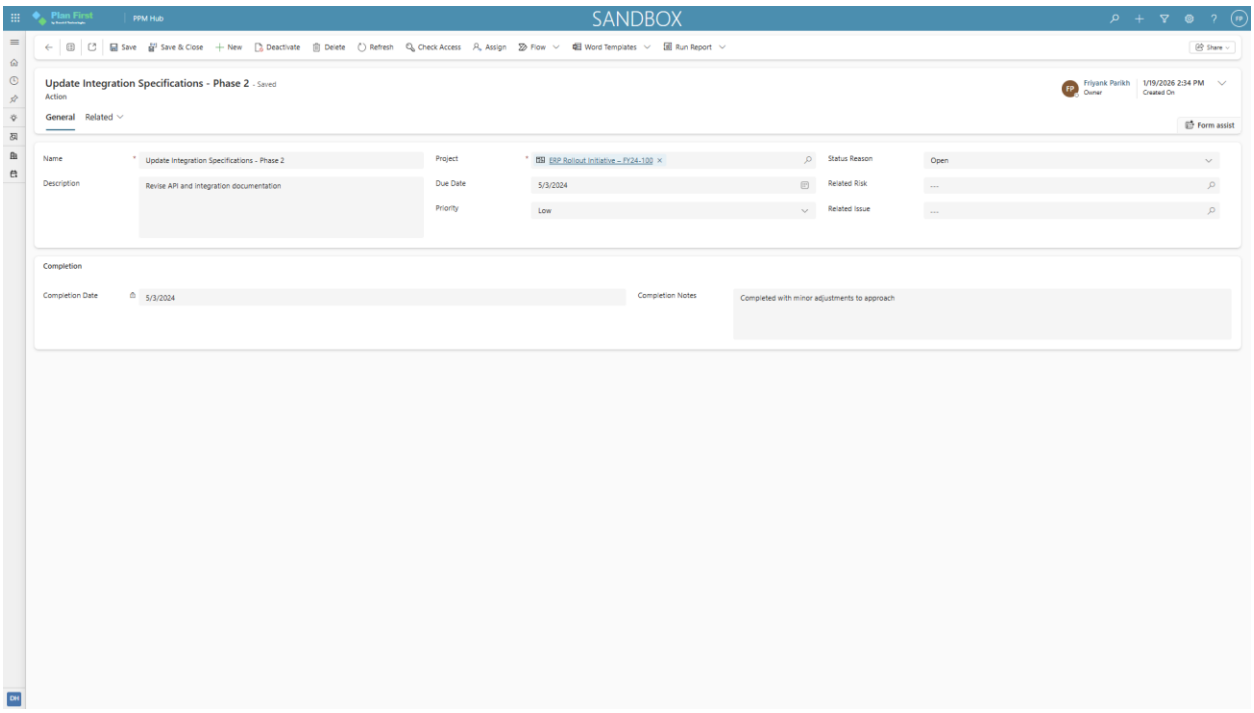
Creating Actions

- Navigate to Action Management
- Create and save new action



Managing Actions

- Modify and update action details including owner, due date, and status



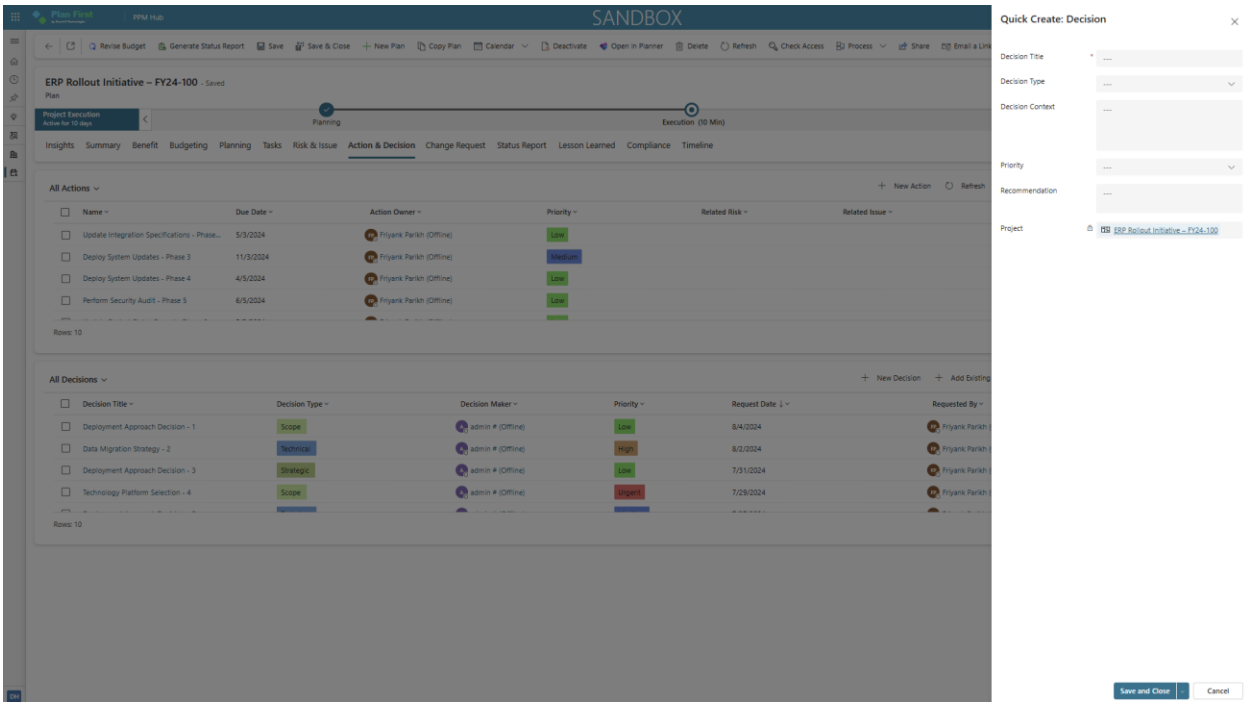
Module 7: Decision Management

Overview

Decision Management provides a centralized repository for documenting key project decisions, rationale, and outcomes.

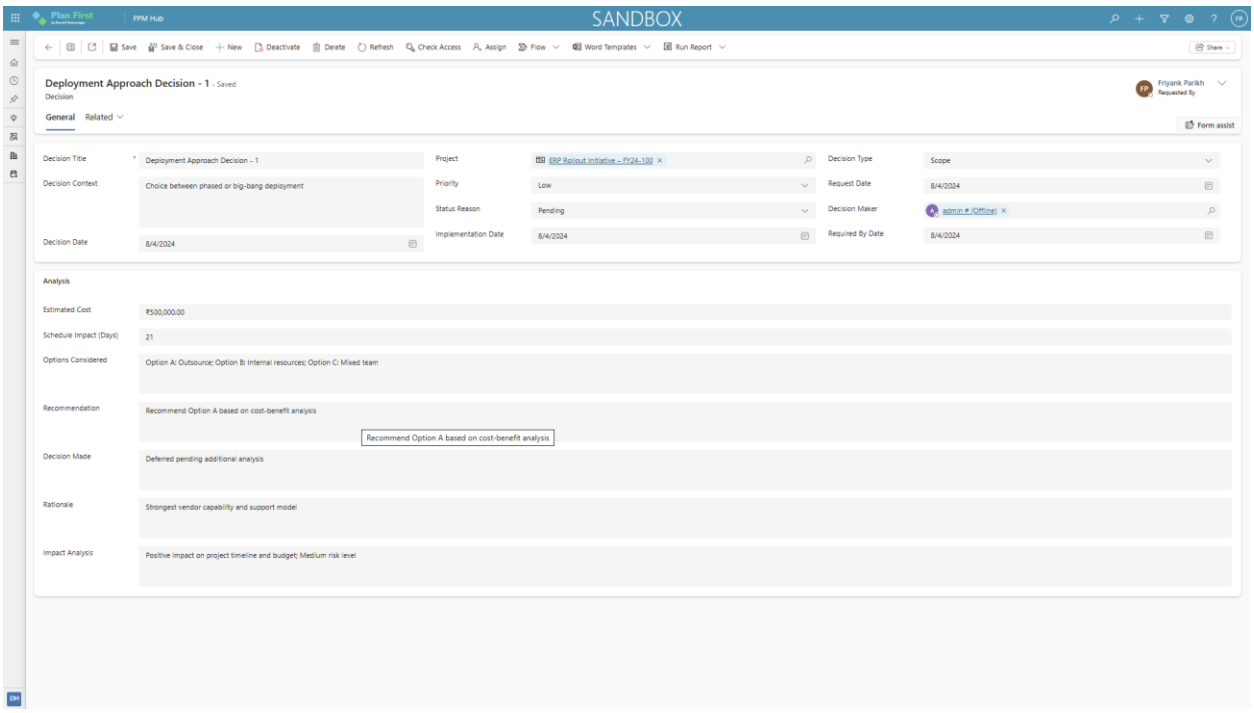
Creating Decisions

- Navigate to Decision Management
- Create and save new decision



Managing Decisions

- Modify and update decision details including context and impact



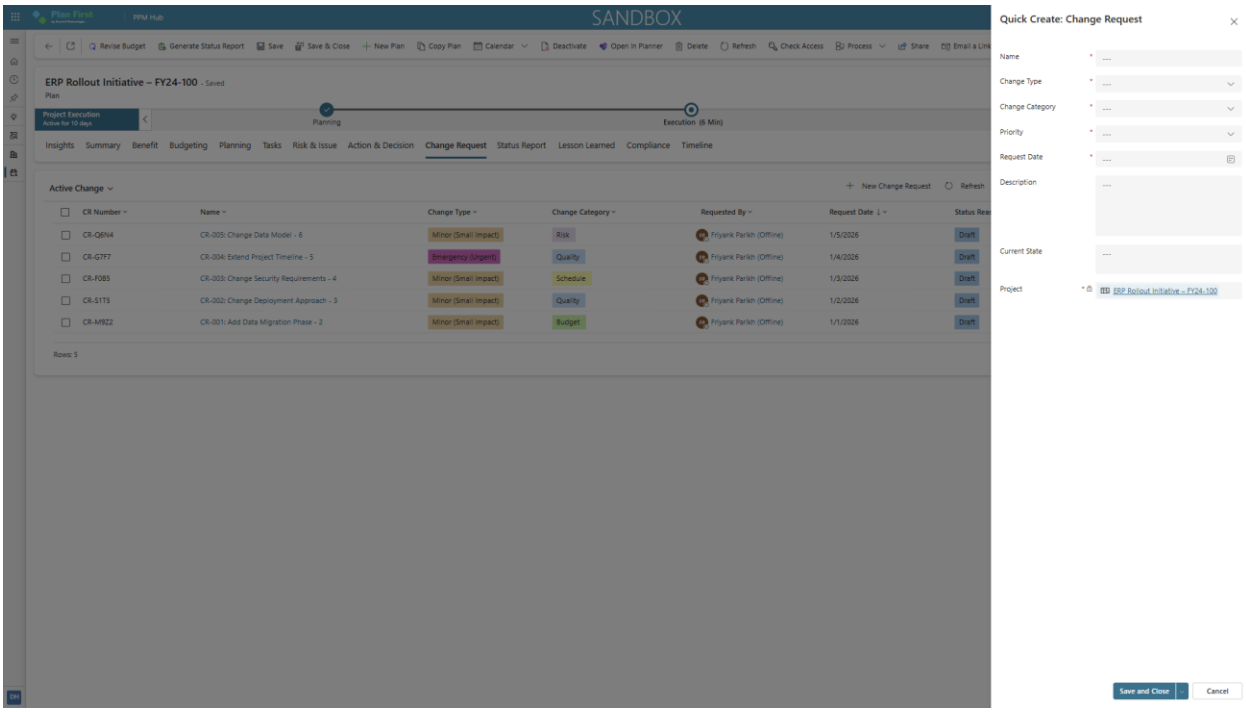
Module 8: Change Request Management

Overview

Change Request Management handles formal scope changes with impact assessment and approval workflows.

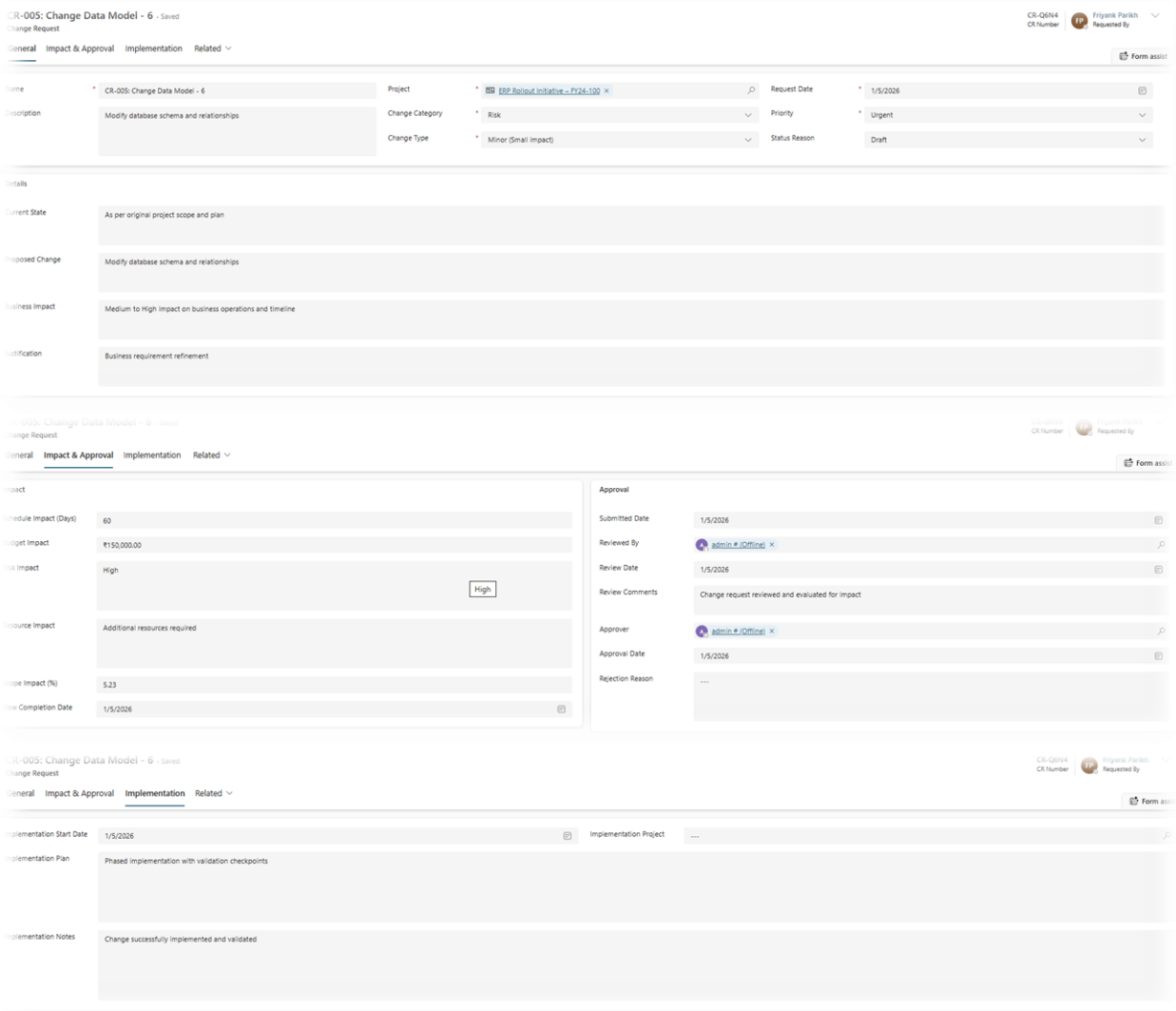
Creating Change Requests

- Navigate to Change Request Management
- Create and save new change request



Managing Change Requests

- Update basic information about the change
- Document impact and approval details
- Record implementation details and outcomes



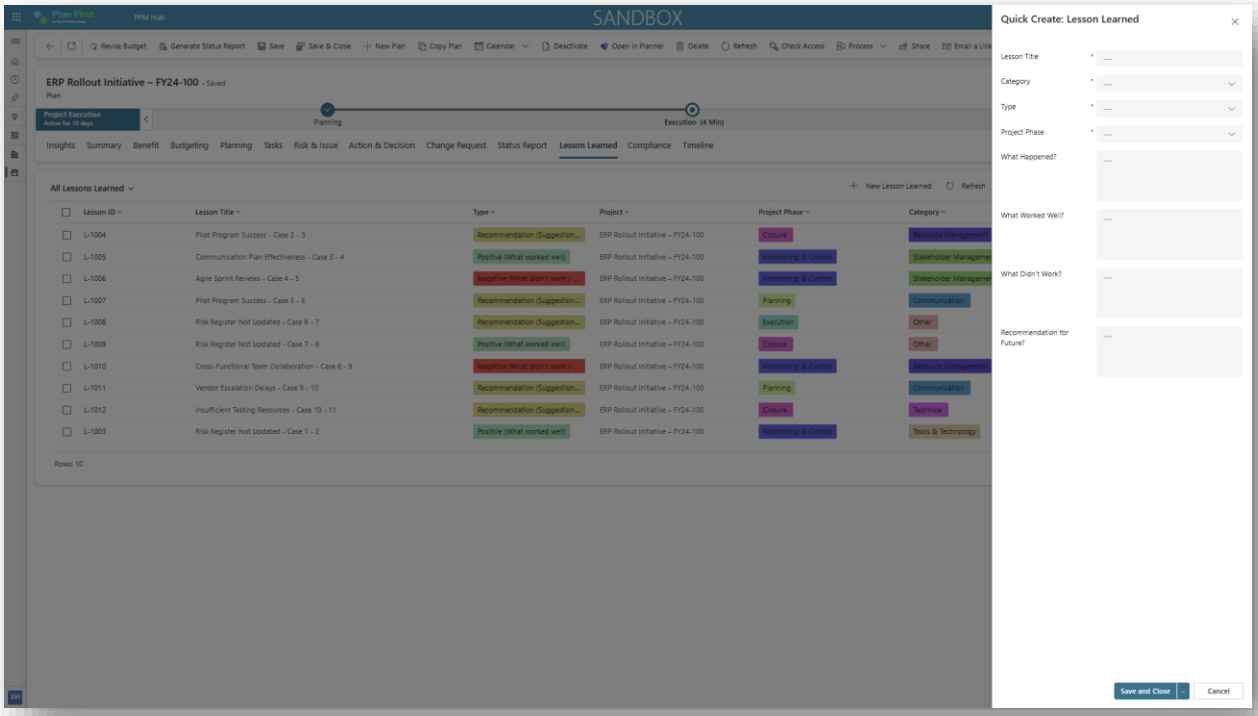
Module 9: Lessons Learned

Overview

Lessons Learned captures organizational knowledge from project experiences, enabling continuous improvement across the portfolio.

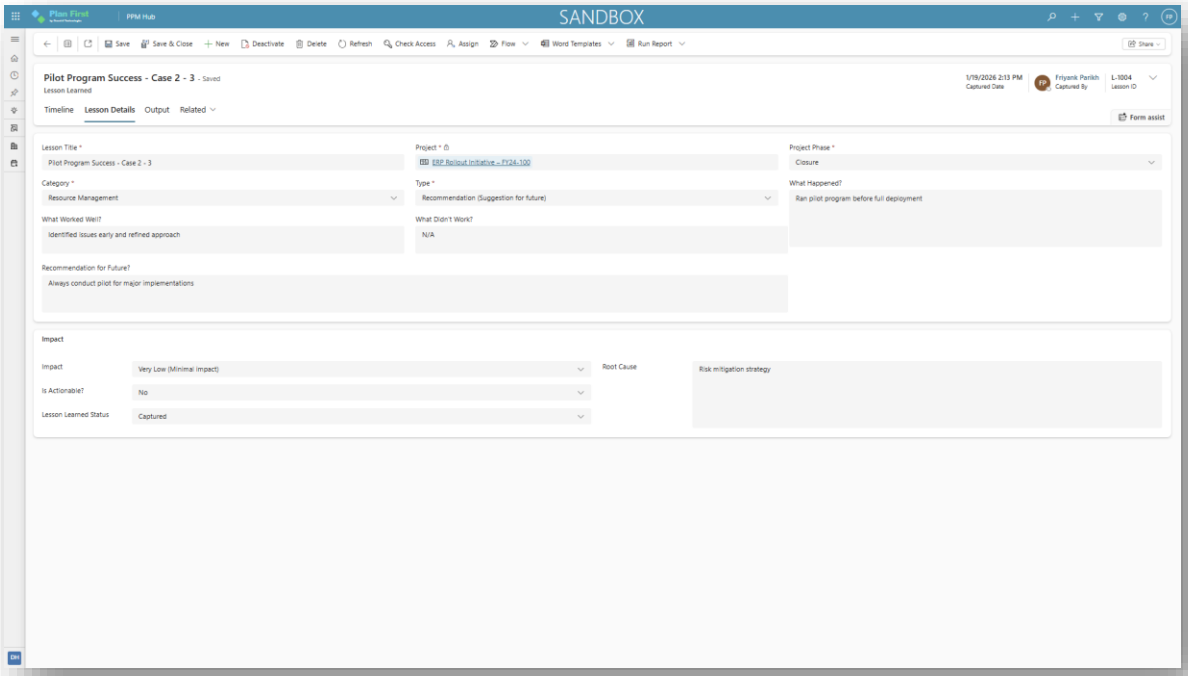
Creating Lessons Learned

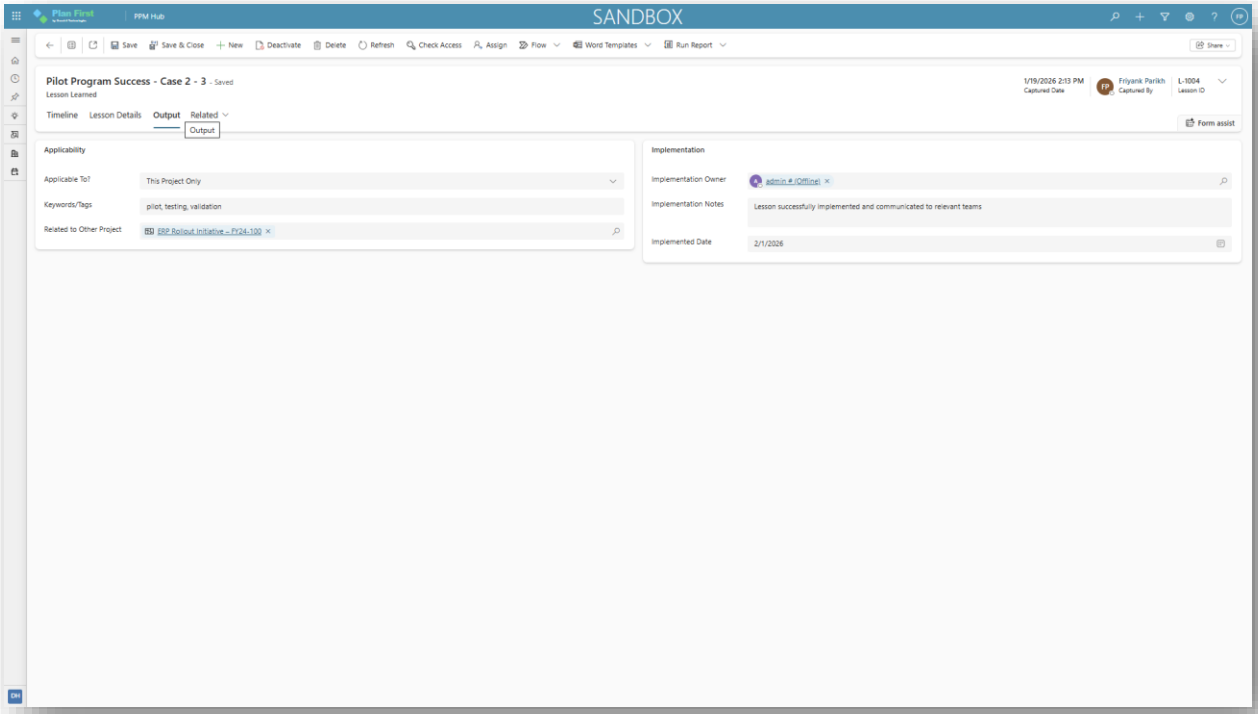
- Navigate to Lessons Learned
- Create and save new lesson learned



Managing Lessons Learned

- Update lesson learned details
- Document outputs and recommendations





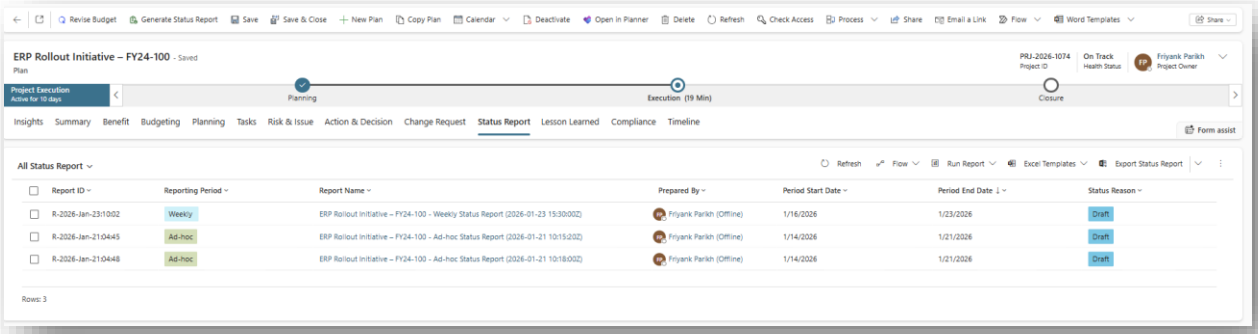
Module 10: Status Reports

Overview

Status Reports automates the creation and distribution of project status updates. The system generates weekly, monthly, and quarterly reports with RAG (Red-Amber-Green) status indicators and comprehensive project metrics.

Generating Status Reports

- Navigate to Status Reports
- Click 'Generate Status Report'
- Tool automatically creates Weekly, Monthly, or Quarterly reports



Updating Status Reports

- Open the generated status report
- Update all values based on project current status
- Set RAG status (Red, Amber, Green) for all key metrics
- Add comments and narrative details

Plan First | PPM Hub

SANDBOX

Save | Submit Report | Show Report | Delete | Refresh | Check Access | Assign | Flow | Word Templates | Run Report | Share

ERP Rollout Initiative – FY24-100 - Ad-hoc Status Report (2026-01-26 17:36:17Z) - Saved

Status Report

R-2026-Jan-26:12:06 (Report ID) | 1/26/2026 5:36 PM (Report Date) | ERP Rollout Initiative – FY24-100 (Project)

Status Report | Progress | Preview

Form assist

Report Name *	ERP Rollout Initiative – FY24-100 - Ad-hoc Status Report (2026-01-26 17:36:17Z)	Period Start Date *	1/19/2026	Period End Date *	1/26/2026
Reporting Period *	Ad-hoc	Status Reason	Draft	Overall Status	---
Submit Date		Submitted To		Prepared By *	Priyank Parikh (Offline)

RAG

Scope Status	---	Risk Status	---	Schedule Status	---
Key Concerns	---	Decisions Required	---	Key Highlights	---

Budget & Schedule

Approved Budget	₹842,731.00	Committed Cost	₹5,762,350.00	Actual Cost	₹250,000.00
Budget Remaining	₹592,731.00	Budget Variance	-592,731.00	Budget Status	---
Budget Comments	---				
Original End Date	4/6/2057	Current End Date	4/6/2027	Schedule Variance (Days)	-1
Schedule Comments	---			Currency	Indian Rupee

Risk & Issue

New Risks (Count)	0	Risks Closed (Count)	0	Critical Open Risks (Count)	1
New Issues (Count)	8	Issues Resolved (Count)	0	Critical Open Issues (Count)	6
Risk/Issue Comments	---				

Total Project Task

25

Overall % Complete

12.00

Completed Tasks Count

3

Support Required

Next Period Activities

Select to enter data

Accomplished Activities

Segoe UI | 11

0• Project 1 - Task 4
• Project 1 - Task 8
• Project 2 - Task 5

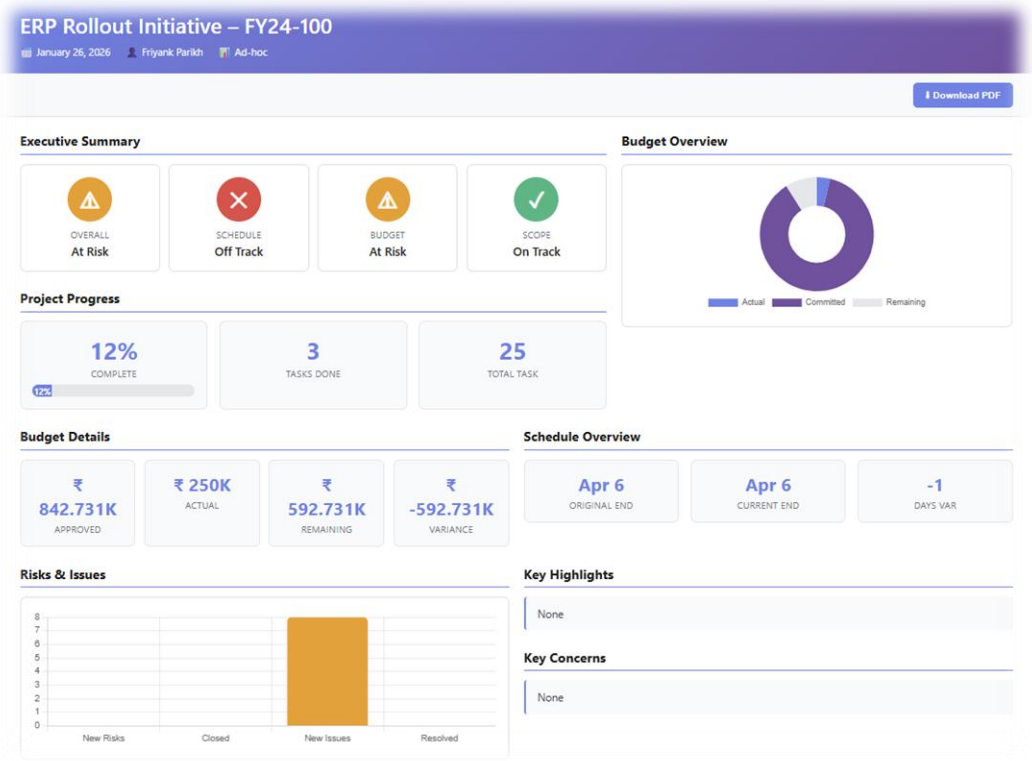
Planned Activities

Segoe UI | 11

• Project 3 - Task 6
• Project 3 - Task 4
• Project 1 - Task 1
• Project 3 - Task 5

Reviewing and Distributing Reports

- Click 'View Status Report' to review completed report
- Validate all information is accurate
- Download Status Report as PDF
- Distribute PDF to stakeholders



Budget Details

₹ 842.731K	₹ 250K	₹ 592.731K	₹ -592.731K
APPROVED	ACTUAL	REMAINING	VARIANCE

Schedule Overview

Apr 6	Apr 6	-1
ORIGINAL END	CURRENT END	DAYS VAR

Risks & Issues

0	1	8	6
NEW RISKS	CRITICAL	NEW ISSUES	CRITICAL

Key Highlights

None

Key Concerns

None

Change Requests

3	2	0
SUBMITTED CR	APPROVED CR	REJECTED CR

Next Period Activities

Accomplished Activitites: 0• Project 1 - Task 4
- Project 1 - Task 8
- Project 2 - Task 5

Planned Activitites: • Project 3 - Task 6
- Project 3 - Task 4
- Project 1 - Task 1
- Project 3 - Task 5

ERP Rollout Initiative – FY24-100

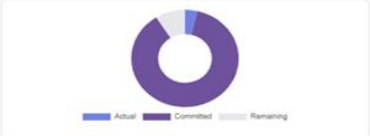
January 26, 2026 Priyank Parikh Ad-hoc

Generating...

Executive Summary

OVERALL	SCHEDULE	BUDGET	SCOPE
At Risk	Off Track	At Risk	On Track

Budget Overview



Project Progress

12%	3	25
COMPLETE	TASKS DONE	TOTAL TASK

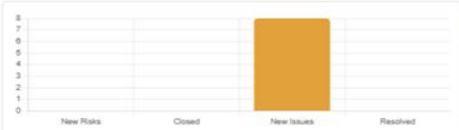
Budget Details

₹ 842.731K	₹ 250K	₹ 592.731K	₹ -592.731K
APPROVED	ACTUAL	REMAINING	VARIANCE

Schedule Overview

Apr 6	Apr 6	-1
ORIGINAL END	CURRENT END	DAYS VAR

Risks & Issues



0	1	8	6
NEW RISKS	CRITICAL	NEW ISSUES	CRITICAL

Key Highlights

None

Key Concerns

None

Change Requests

3	2	0
SUBMITTED CR	APPROVED CR	REJECTED CR

Next Period Activities

Accomplished Activitites: 0• Project 1 - Task 4
- Project 1 - Task 8
- Project 2 - Task 5

Planned Activitites: • Project 3 - Task 6
- Project 3 - Task 4
- Project 1 - Task 1
- Project 3 - Task 5

System Benefits

For Project Managers

- Centralized project information in one system
- Multiple task views (List, Kanban, Timeline) for different planning needs
- Automated status report generation saves time
- Integrated risk, issue, and change management

For Portfolio Managers

- Portfolio-wide visibility across all ideas, demands, and projects
- Prioritization through weighted scoring
- Benefits realization tracking
- Budget analysis and profit margin monitoring

For Leadership

- Strategic alignment through idea-to-project traceability
- Data-driven decision making with scoring and analytics
- Standardized approval workflows
- Comprehensive reporting and insights

For the Organization

- Improved project success rates through structured methodology
- Knowledge capture through lessons learned
- Better resource allocation and utilization
- Enhanced collaboration and transparency

Best Practices

Idea Management

- Encourage all stakeholders to submit ideas through the system
- Review and respond to ideas within defined SLAs
- Provide clear feedback when rejecting ideas

Demand Management

- Configure scoring criteria that align with organizational strategy
- Review and update weightings periodically
- Ensure budget estimates are realistic and well-documented
- Track benefits realization dates for accountability

Project Management

- Set baselines after initial planning is complete
- Update task progress weekly
- Use timeline view to identify and manage dependencies
- Document risks early and update mitigation strategies regularly
- Capture lessons learned throughout the project, not just at closure

Status Reporting

- Generate reports on a consistent schedule
- Use RAG status consistently across all projects
- Provide clear, actionable commentary with status updates
- Escalate red items immediately with mitigation plans

System Configuration Guidelines

Scoring Configuration

The scoring system uses weighted criteria to evaluate demands. Administrators can configure these weights in the Settings area. Ensure that:

- Total weights across all criteria equal 100%
- Criteria align with organizational strategic priorities
- Weightings are reviewed and updated annually or when strategy changes

Approval Workflows

Configure approval workflows to match your organizational structure. Available options include:

- Single User: Always routes to the same approver
- Field-Based: Determines approver based on a field value (e.g., department, cost center)
- Team-Based: Routes to a team queue for collaborative approval

Budget Configuration

- Configure budget approver thresholds if needed
- Set up cost and sales budget categories appropriate for your organization
- Define budget revision policies and approval requirements

Common Questions and Troubleshooting

Q: How do I change the scoring weights?

A: Navigate to Settings and open the Score Config. Update the weights for each criteria. Note that changing weights will affect the scoring of all future demands, but does not retroactively change scores for existing demands.

Q: Can I revise a budget after it's been approved?

A: Yes, use the 'Revise Budget' function. This creates a new version of the budget while preserving the previous approved version. The new version must go through the approval process again.

Q: What's the difference between a Risk and an Issue?

A: A Risk is something that might happen in the future (potential problem), while an Issue is something that has already happened (actual problem). Risks have probability assessments; Issues have resolution tracking.

Q: How do I set task dependencies?

A: Use the Timeline view to visually create and modify task dependencies. You can drag connections between tasks to establish predecessor/successor relationships.

Q: Who receives status report notifications?

A: Status report distribution is configured at the project level. You can define stakeholders and distribution lists in the project settings.

Q: Can I customize the dashboard views?

A: Yes, use the show/hide charts feature to customize which charts appear on your dashboard. You can also change view layouts and chart types to suit your preferences.

Conclusion

Plan First PPM provides a comprehensive, end-to-end solution for managing your project portfolio from initial idea through project closure. By following the workflows and best practices outlined in this guide, your organization can achieve better project outcomes, improved strategic alignment, and enhanced portfolio visibility.

The system's integrated approach ensures that information flows seamlessly from ideas to demands to projects, with full traceability and governance throughout the lifecycle. Budget tracking, benefits realization, risk management, and automated reporting provide the controls and insights needed for effective portfolio management.

This user guide serves as your comprehensive reference for navigating and utilizing all features of Plan First PPM. Keep this document accessible for training new users and as a reference for existing users.