

Get started with Stage Planning

Stage Plan Applications Overview

Levels of Altitude: Stage Planning

November 2025

Get started with Stage Planning

2

■ Introduction

- Levels of Altitude in Planning
- Stage Plan Applications:
 - Scenario Planning
 - Financial Management
 - High Level Timelines
 - ...

■ Setting up a Space for Stage Planning

■ Working with Stages:

- Where to add Stages?
- How to add Stages?
- How to select Stage Types?
- Adding Stage Milestones
- How to add Skills / Resources?

■ Combining Stage and Detail plans

- Why integration of Stage with Detail Plans?
- Methods for integrating Stage and Detail Plans
 - Via Task Properties: link Task to a Stage
 - Via Stage – Task Dependencies
- Recommendations

■ Portfolio Timeline Visualization

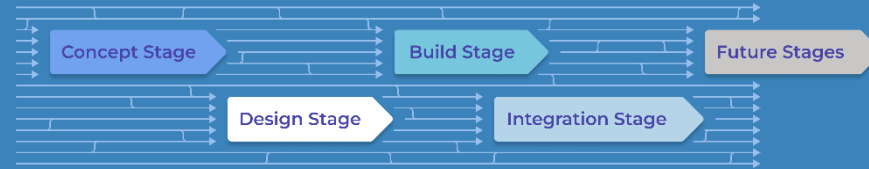
■ Summary:

- LYNX Stage Planning Examples

Levels of Altitude

Timeline World

Stage Plan

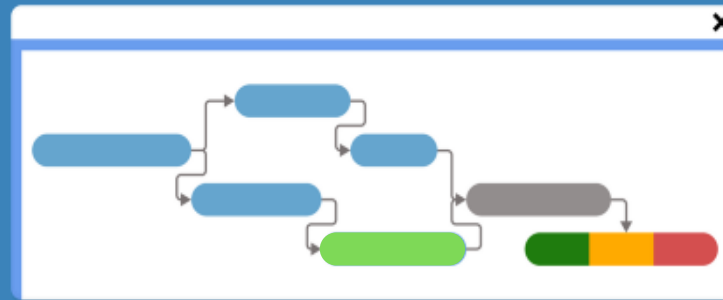


Level 1

High Level Timeline and Resource Estimates and Financials

Detail Plan

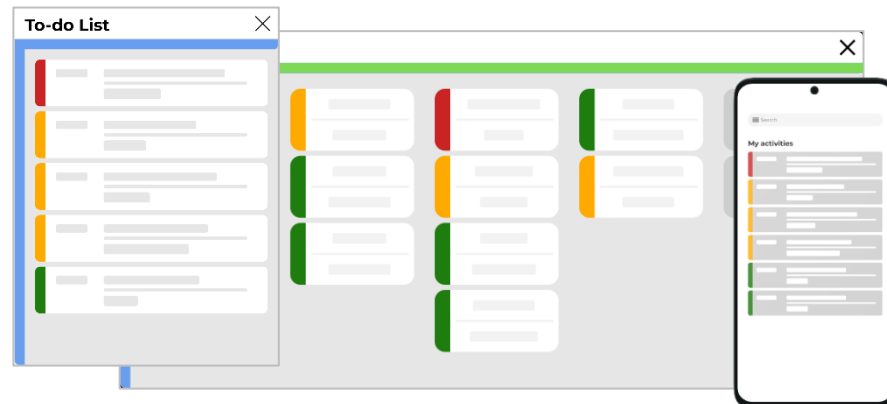
Tasks & Workpackages



Level 2:

Planning for Execution
Critical Path / Critical Chain
Resource Planning

Tasks & Cards



Level 3:

Daily Operations
Task Management
Self-Managing Teams

Uniform Priorities

Agile World

Discover the value of LYNX Stage Planning

Stage Plan Applications

High-Level Timelines

- Communicate Stage Plans with Stakeholders, Customers, Management.
- Communicate Actual Progress against Stage Plan
- Create Roadmaps

Progressive (detailed) Planning

- Avoid detailed planning too early, stay Agile
- Add (only) Detailed Planning for Execution to early stages
- Identify Future Stages without Essential Flow with Stage Only Plan

Resource Planning

- Identify high-level Resource Requirements for the end-to-end Timeline at “Stage Level”

Financial Management

- Manage Project Financials with Stages and Budgets
- Manage Cashflow
- Track planned versus actuals

Portfolio Scenario Planning

- Create Scenario Stage Plans
- Run Scenario Wizard at “Stage Level” and/or “Detailed Level”
- Auto-Sizing of Stages
- 2-Level Scenario Planning



Space Settings

Switching on of Stage Features

- Stages
- Budgeting

Space Properties

Switching on Stage Planning / Budgeting

The image shows two windows from a software application. The left window is titled 'Configure' and has a sidebar with 'Objects' and 'Space' sections. The 'Space' section is expanded, and 'Space properties' is selected. The right window is titled 'Space properties' and has tabs for 'General', 'Turn features on/off', 'Parameters', 'Notifications', 'Invitation Email', and 'Tameflow signs'. The 'General' tab is active, showing a list of features with checkboxes. A blue box highlights the 'Staging' and 'Budgeting' options.

Feature	Checked	Description
Staging	<input checked="" type="checkbox"/>	When checked, staging is enabled for projects
Budgeting	<input type="checkbox"/>	When checked, budgeting is enabled for projects (staging is required)
Debuffered chain durations	<input type="checkbox"/>	Calculate progress based on the debuffered duration of the chain
Individual calendars	<input checked="" type="checkbox"/>	When checked, resources can have individual calendars
Resource management	<input checked="" type="checkbox"/>	When checked, advanced resource management is enabled
Resource selection in scheduling phase	<input type="checkbox"/>	Show soft assignments of resources when project status is 'Not started'
Time tracking	<input checked="" type="checkbox"/>	Uncheck to disable time tracking
Hide Etc on 'My Activities'	<input type="checkbox"/>	Check to hide the Etc value. Etc will be hidden as long as the task is 'Not started'
Show scheduled dates	<input checked="" type="checkbox"/>	Uncheck to hide the (start) dates displayed under 'My Activities' and 'Active tasks'
Supports hours	<input checked="" type="checkbox"/>	Shows the hour on datetime values
Sort 'My activities' on 'Ready to start'	<input checked="" type="checkbox"/>	When checked, tasks showing on 'My Activities' are sorted by 'Started Ready To Start Not started'
Multiple task managers	<input checked="" type="checkbox"/>	Allow multiple taskmanagers per task?
Default schedule engine	<input type="checkbox"/>	Set default schedule engine to Load factor (LF) scheduling (instead of CCPM)
Control scheduling options	<input type="checkbox"/>	Limit constraint and dependency scheduling options
Always level resource assignments on skill	<input type="checkbox"/>	When selected, resource levelling takes place on the skill. The scheduler will select resources for normal skill's but these resources do not impact levelling
Advanced scheduling properties	<input checked="" type="checkbox"/>	When checked advanced schedule features are enabled: <ul style="list-style-type: none">• Unit-of-measures can be used• Calendar tab is added to the desktop• Project stages are supported• Fixed duration tasks are supported• Tasks constraints are supported

Creating a Stage Plan

Adding Stages in LYNX



Adding stages (1)

Select the Goto box

The screenshot shows the top navigation bar with 'SP-01 Adding a Stage Plan' selected. Below it is a toolbar with 'Save', 'Goto', 'Print', 'Resource load', and 'Properties'. A 'Select project view' dropdown menu is open, showing 'Gantt', 'Gantt & Staging', and 'Cards'. The 'Gantt & Staging' option is highlighted. The main area shows a Gantt chart with weeks W44/2025, W45/2025, and W46/2025.

Process for entering stages is the same as for standard tasks in a project plan.

The screenshot shows the 'Stage Plan Area' in detail. It features a table with columns for 'ID', 'Stage name', 'Prj Duration', 'Start', and 'Stop'. The table is currently empty, with a message 'No stages defined (add stage)'. Below the table is another table with columns for '#', 'ID', 'Name', 'Prj duration', 'WP Size', and 'Resources'. The main area shows a Gantt chart with weeks W44/2025, W45/2025, and W46/2025.

ID	Stage name	Prj Duration	Start	Stop
No stages defined (add stage)				

#	ID	Name	Prj duration	WP Size	Resources					
	W44/2025	W45/2025	02	03	04	05	06	07	08	09

The Stage Plan Area

Adding stages and Stage Type(2)

Type: Virtual Drum (Scenario Planning) - Stage (Budget Management)

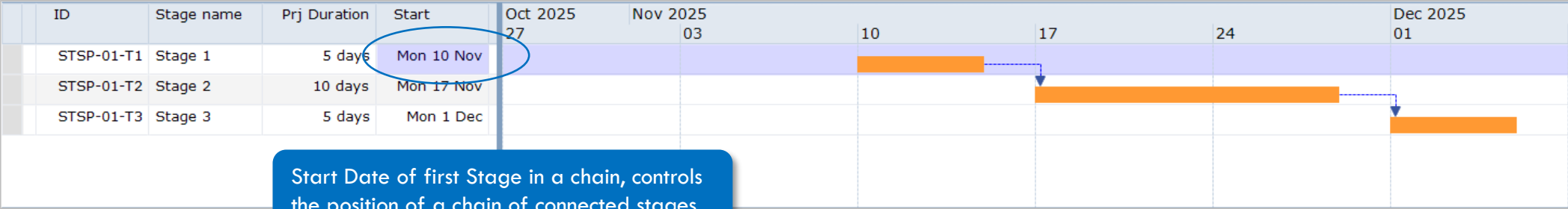
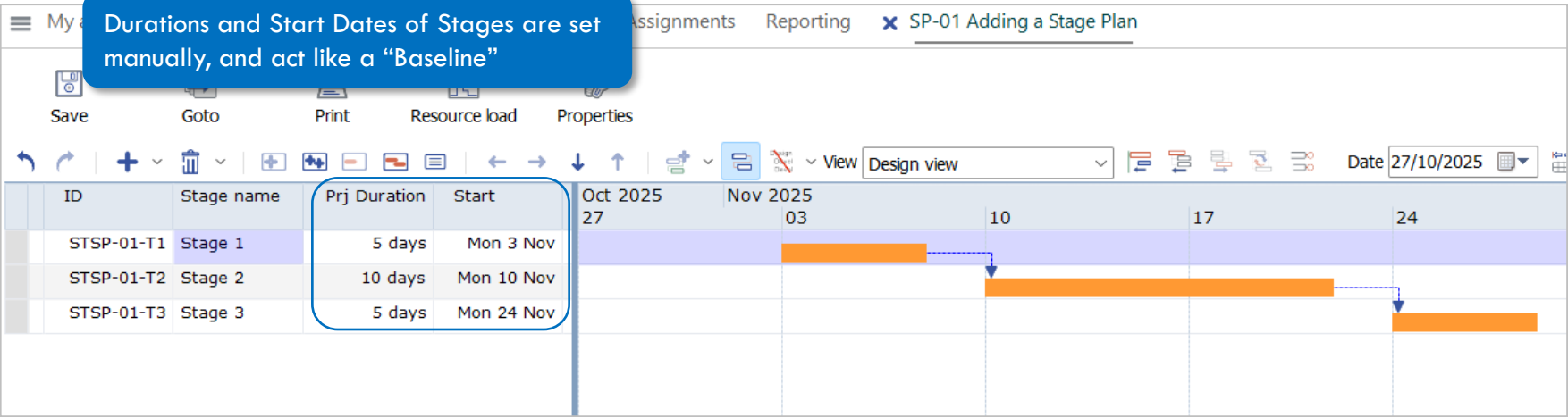
Durations and Start Dates of Stages are to be set manually, and act like a "Baseline"

The screenshot displays the Primavera P6 interface. At the top, a blue callout box states: "Durations and Start Dates of Stages are to be set manually, and act like a 'Baseline'". Below this, a Gantt chart shows three stages: STSP-01-T1, STSP-01-T2, and STSP-01-T3, each with a duration of 1 day and a start date of Mon 3 Nov. A blue box labeled "Control Stage Properties" points to the task properties window for STSP-01-T3. In this window, the "Tasktype" dropdown menu is open, showing options: Virtual drum, Milestone, Summary task, Stage, and Virtual drum. A second blue box points to the "Stage" option in this menu. The "Task status" section on the left shows "Not started" selected. The "Project statistics" panel on the right shows: Project start Today, Project end n/a, Duration 0 days, Scheduled start n/a, Scheduled finish n/a, Due date perf. On time, Longest path 0 days, Resource hours 0h, and Remaining 0h.

Select Type: **Virtual drum** for Scenario Planning

Select Type: **Stage** for Budget Management

Create a Stage Plan (1)



Add Visuals and Labels

My activities Messages (0) Project portfolio Active tasks Assignments Reporting **SP-01 Adding a Stage Plan**

Save Goto Print Resource load Properties

View Design view Date 10/11/2025

ID	Stage name	Prj Duration	Start	Nov 2025	Dec 2025
STSP-01-T1	Stage 1	5 days	Mon 10 Nov	10 17 24	01
STSP-01-T2	Stage 2	10 days	Mon 17 Nov		
STSP-01-T3	Stage 3	5 days	Mon 1 Dec		

#	ID	Name	Prj duration	WP Size	Resources	Task	Nov 2025	Dec 2025
							10 17 24	01

1 STSP-01-T1 **STAGE** Stage 1

Task status: Not started, Started, Paused, Completed, Aborted. Critical path task?, Ready to start?

Visual: Edge color, Fill color (yellow), Images, Bar label, Use description as label

Create a Stage Plan (2)

Add Skill Requirement(s) / Stage Budget Requirement(s)

Task details for STSP-01-T1 (Stage 1):

Resource/Skill	Estimated time	Units	Status	Estimated time to complete
D: Critical Capacity	virtual drum - 40h	100%	Not started	

Task status: Not started, Started, Paused, Completed, Aborted. Critical path task?, Ready to start?

Visible on My Activities page? Update duration from cards

Task Type: Virtual drum

Task details for STSP-01-T1 (Stage 1):

Resource/Skill	Estimated time	Units	Status	Estimated time to complete
B: Designer	budget - 40h	100%	Not started	

Task status: Not started, Started, Paused, Completed, Aborted. Critical path task?, Ready to start?

Team members: Team cannot be set, skill is not a team

Task Type: Stage

Create a Stage Plan (3)

Add Milestones and Milestone Behavior (fixed or floating)

ID	Stage name	Prj Duration	Start
STSP-01-T1	Stage 1	5 days	Mon 10
STSP-01-T2	Stage 2	10 days	Mon 17
STSP-01-T4	M/S	m/s	Mon 24
STSP-01-T3	Stage 3	5 days	Mon 24

Task details for STSP-01-T4 (M/S):
Task status: Not started
Tasktype: Milestone
Constraint: Do not level
Date: Mon 24 Nov

Use "Do not level" with a Date for setting a **Fixed Milestone**

When use **Fixed Milestones**?

When doing **Scenario Planning, Fixed Milestones** are used to automatically determine Stage duration between two Fixed Milestones Dates.

ID	Stage name	Prj Duration	Start
STSP-01-T1	Stage 1	5 days	Mon 10
STSP-01-T2	Stage 2	10 days	Mon 17
STSP-01-T4	M/S	m/s	Sat 29
STSP-01-T3	Stage 3	5 days	Mon 1

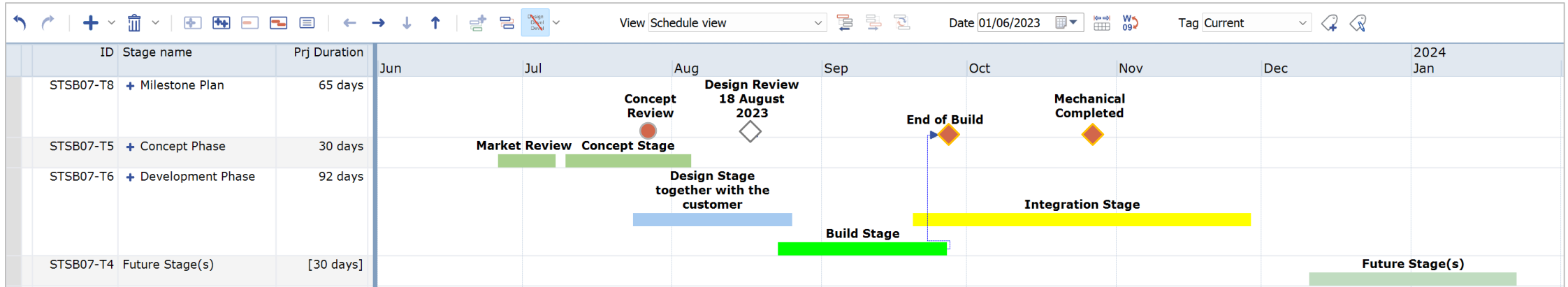
Task details for STSP-01-T4 (M/S):
Task status: Not started
Tasktype: Milestone
Constraint: As soon as possible

When use **Floating Milestones**?

Typically used for Visualization Purposes

Floating Milestone (no constraint set).
LYNX Positions Stages again.

Example Stage Plan



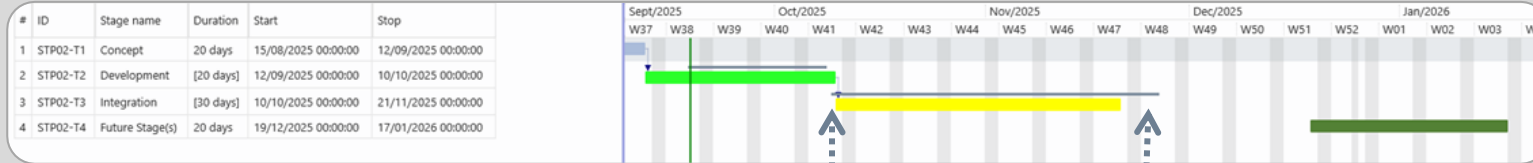


Combining Stage and Detail Plans

- Why integration of Stage with Detail Plans?
- Methods for integrating Stage and Detail Plans

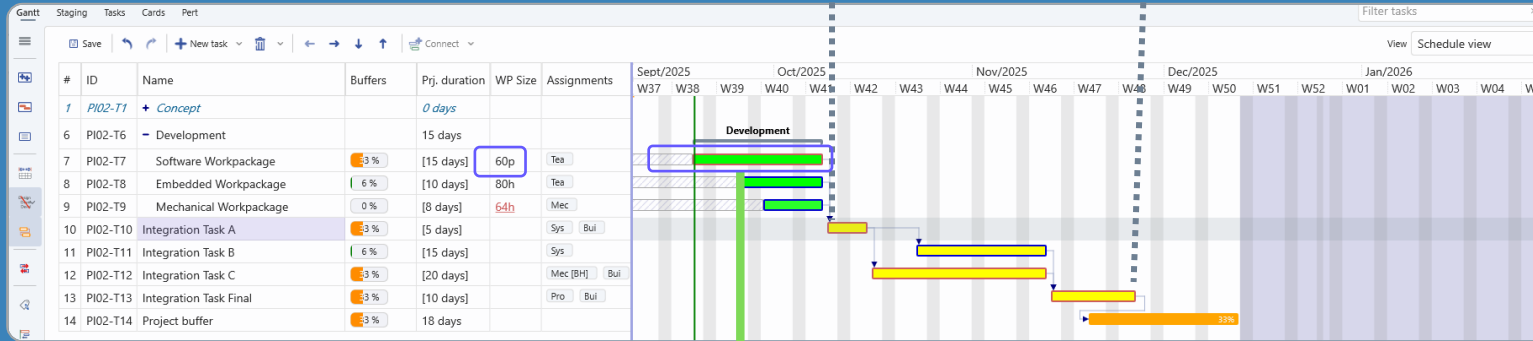
Example: Integration of Stage (L1) and Detail Plan (L2) - Levels of Altitude

Stages



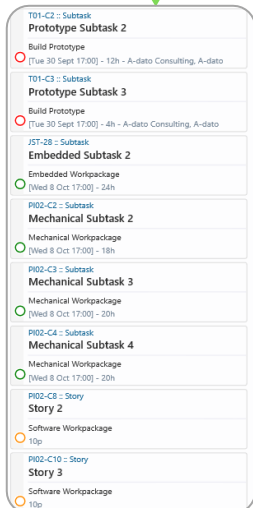
Level 1 (Optional)
High Level Timeline and Resource Estimates

Tasks Workpackages



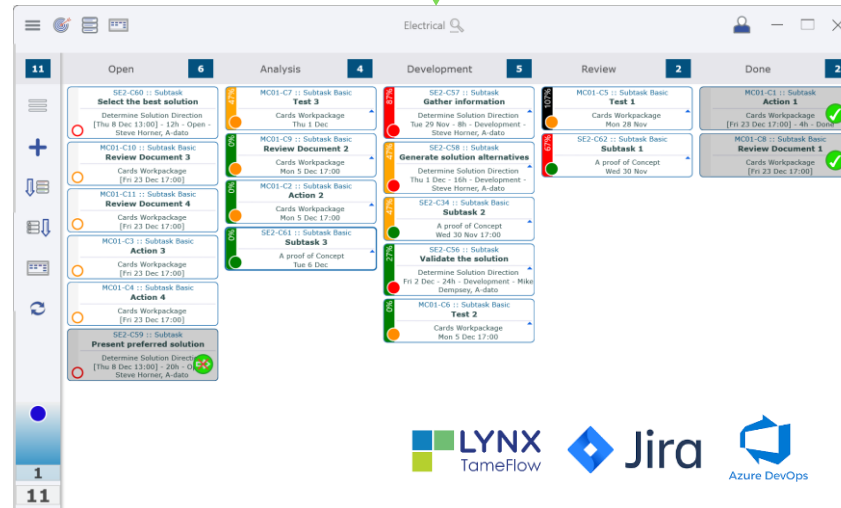
Level 2:
Planning for Execution
Critical Path / Critical Chain
Resource Planning

Cards



The TameFlow Approach

Through LYNX TameFlow, Agile and Kanban workflows are integrated, bringing Agile CCPM to life.



Level 3:
Daily Operations
Self Managing Teams

How to integrate Stage and Detail Plans?

Method 1: Connect Task(s) to a stage via Staging Tab Dropdown

Grey Line in Stage Plan, represents Chain Duration of connected Tasks from Detailed Plan

Select Task(s) and choose a Stage to connect Tasks to the selected Stage.

ID	Stage name	Prj Duration	Start
STSP-01-T1	Stage 1	5 days	Mon 10
STSP-01-T2	Stage 2	10 days	Mon 17
STSP-01-T4	M/S	m/s	Sat 29
STSP-01-T3	Stage 3	5 days	Mon 1

#	ID	Name	Prj duration	WP Size	Resource
1	SP-01-T1	Task 1	2 days		Add +
2	SP-01-T2	Task 2	3 days		Add +
3	SP-01-T3	Task 3	5 days		Add +
4	SP-01-T4	Task 4	4 days		Add +
5	SP-01-T5	Task 5	6 days		Add +
6	SP-01-T6	Task 6	5 days		Add +

Task 5: SP-01-T5

Task status: Not started, Started, Paused, Completed, Aborted

Select stage for this task:

- Stage 2
- M/S
- Stage 1
- Stage 2
- Stage 3

Details about stage 'Stage 2':

Stage start date: 17/11/2025
Stage end date: 29/11/2025
Duration: 10 days

How to integrate Stage and Detail Plans?

Method 2: Connect “Anchor points” in Detail Plan with Stage Plan

Select **Stage Predecessor** and **Successor** from Detail Plan as “Anchor points”

The screenshot displays the Primavera P6 software interface, showing the integration of a Stage Plan and a Detail Plan. The Stage Plan (top) shows three stages: STSP-01-T1 (5 days), STSP-01-T2 (10 days), and STSP-01-T3 (5 days). The Detail Plan (bottom) shows six tasks: SP-01-T1 (2 days), SP-01-T2 (3 days), SP-01-T3 (5 days), SP-01-T4 (4 days), SP-01-T5 (6 days), and SP-01-T6 (5 days). The 'Dependencies' tab is active, showing predecessor and successor relations. A predecessor relation is defined between SP-01-T2 and Task 2 (Finish -> Start), and a successor relation is defined between SP-01-T6 and Task 6 (Finish -> Start). Blue arrows point from these relations to the corresponding task bars in the Gantt chart.

ID	Stage name	Prj Duration	Start
STSP-01-T1	Stage 1	5 days	Mon 10 Nov
STSP-01-T2	Stage 2	10 days	Mon 17 Nov
STSP-01-T3	Stage 3	5 days	Mon 1 Dec

#	ID	Name	Prj duration	WP Size	Resource
1	SP-01-T1	Task 1	2 days		Add +
2	SP-01-T2	Task 2	3 days		Add +
3	SP-01-T3	Task 3	5 days		Add +
4	SP-01-T4	Task 4	4 days		Add +
5	SP-01-T5	Task 5	6 days		Add +
6	SP-01-T6	Task 6	5 days		Add +

Predecessor relations (edit)

#	Predecessor	Relation	Lag
1	SP-01-T2 Task 2	Finish -> Start	

Successor relations (edit)

#	Successor	Relation	Lag
1	SP-01-T6 Task 6	Finish -> Start	

How to integrate Stage and Detail Plans?

It is possible to mix methods...

The screenshot displays a project management interface with two views illustrating integration methods. The top view shows a Gantt chart with three stages (STSP-01-T1, STSP-01-T2, STSP-01-T3) and a task bar. A blue callout box labeled "Method 2: Anchor Points" points to a task bar that spans across the boundaries of Stage 1 and Stage 2. The bottom view shows a task list with six tasks (SP-01-T1 to SP-01-T6) and a Gantt chart. A blue callout box labeled "Method 1: Connect Tasks to Stages" points to a task bar that is connected to Stage 1. The bottom panel shows the task details for "SP-01-T2 Task 2", including a "Task status" section with radio buttons for "Not started", "Started", "Paused", "Completed", and "Aborted". The "Staging" tab is active, showing "Select stage for this task:" with a dropdown menu set to "Stage 1" and a "Clear" button. The "Details about stage 'Stage 1':" section shows "Stage start date: 10/11/2025", "Stage end date: 15/11/2025", and "Duration: 5 days".

ID	Stage name	Prj Duration	Start
STSP-01-T1	Stage 1	5 days	Mon 10 Nov
STSP-01-T2	Stage 2	10 days	Mon 17 Nov
STSP-01-T3	Stage 3	5 days	Mon 1 Dec

#	ID	Name	Prj duration	WP Size	Resource
1	SP-01-T1	Task 1	5 days		Add +
2	SP-01-T2	Task 2	4 days		Add +
3	SP-01-T3	Task 3	5 days		Add +
4	SP-01-T4	Task 4	4 days		Add +
5	SP-01-T5	Task 5	6 days		Add +
6	SP-01-T6	Task 6	5 days		Add +

Task status

- Not started
- Started
- Paused
- Completed
- Aborted

Select stage for this task:

Details about stage 'Stage 1':

Stage start date: 10/11/2025
Stage end date: 15/11/2025
Duration: 5 days

Example:

Anchor points via Milestones in Detail Plan

The screenshot displays a project management software interface in 'Design view'. The top toolbar includes navigation and view controls. The main area is divided into two tables and a task detail panel.

ID	Stage name	Prj Duration	Start
STSP-01-T1	Stage 1	5 days	Mon 10 Nov
STSP-01-T2	Stage 2	10 days	Mon 17 Nov
STSP-01-T3	Stage 3	5 days	Mon 1 Dec

#	ID	Name	Prj duration	WP Size
1	SP-01-T16	Milestones	0 days	
2	SP-01-T12	M/S - D1	m/s	
3	SP-01-T13	M/S - D2	m/s	
4	SP-01-T14	M/S - D3	m/s	
5	SP-01-T15	Tasks	20 days	
6	SP-01-T1	Task 1	2 days	
7	SP-01-T2	Task 2	3 days	
8	SP-01-T3	Task 3	5 days	
9	SP-01-T4	Task 4	4 days	
10	SP-01-T5	Task 5	6 days	
11	SP-01-T6	Task 6	5 days	

The Gantt chart below these tables shows a timeline from Nov 10, 2025, to Dec 01, 2025. Milestones (orange diamonds) are placed at Nov 17, Nov 24, and Dec 01. Tasks are represented by colored bars (yellow, blue, red, green) with dependency arrows. A task detail panel at the bottom is open for 'STSP-01-T2' (Stage 2), showing task status options and dependency tables.

Task status: Not started, Started, Paused, Completed, Aborted. Critical path task?, Ready to start?

Predecessor relations:

#	Predecessor	Relation	Lag
SP-01-T13	M/S - D2	Finish -> Start	

Successor relations:

#	Successor	Relation	Lag
SP-01-T14	M/S - D3	Finish -> Start	

Integration Stage and Detail Plans

Considerations & Recommendations

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Why integrate Stage with Detail Plans?

- Project Management:
 - Compare Base Line Stage Plan with actual Progress
 - Visualization and Management Overview
- Scenario Planning Perspective:
 - Enable 2-Tier Scenario Planning, combining Stage
 - Automatic Sizing of Remaining Stage Duration considering Task Progress and Completion
- Budget Management Perspective:
 - Distribute budget across Tasks
 - Compare Stage Budget with Planned Costs

Which integration Methods to use?

- Budget Management Perspective:
 - Always use **Method 1** to connect all Tasks to a Stage
- Scenario Planning Perspective:
 - Either Method 1 or Method 2 can be used (and Mixed)
 - **Method 2 (Anchor points) Pro's:**
 - Only start and end anchor point must be set
 - Start and End points are relatively stable, even if Project plans are subject to many changes
 - **Method 1 (Drop-down) Pro's:**
 - Easy selection of multiple tasks to assign to a Stage in one step
 - Filtering possible of all Tasks linked to a Stage

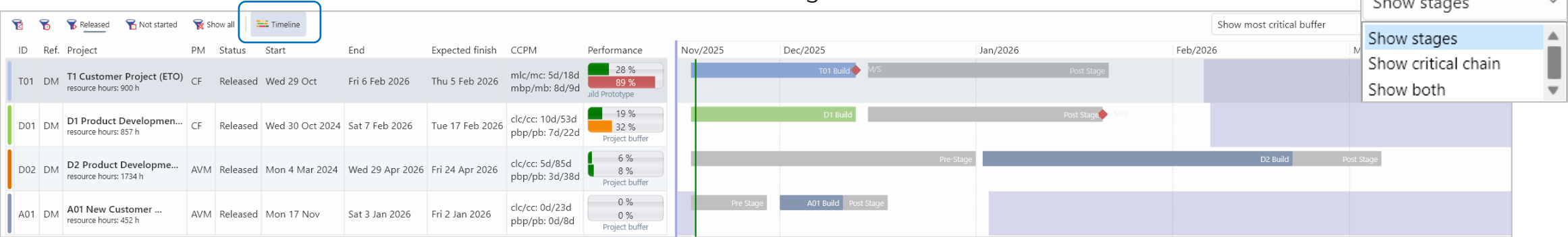


Portfolio Timeline Visualization

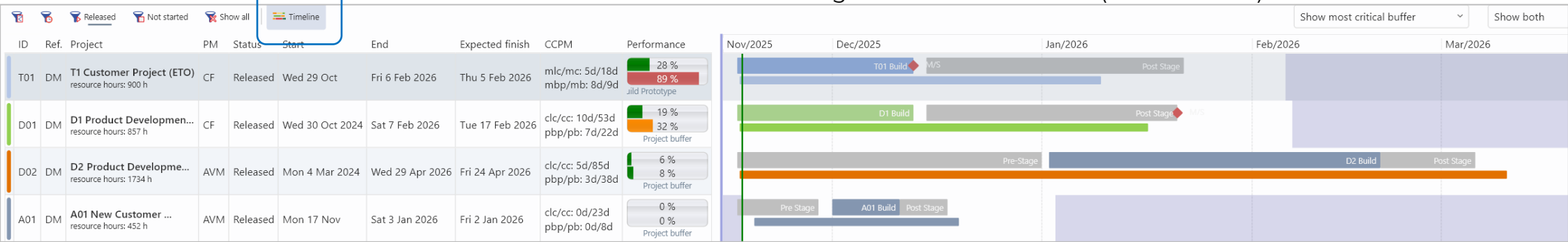
Portfolio Timeline Visualization

Stage Plan Timeline Views

Show Stages:
Show Stage Plan Timeline



Show Both:
Show Stage Plan and Detail Plan (Critical Chain) Timeline





Stage Planning Applications

LYNX Examples:

- Two Level Scenario Planning
- Financial Management
- High Level Timelines / Communication

Discover the value of LYNX Stage Planning

Stage Plan Applications

High-Level Timelines

- Communicate Stage Plans with Stakeholders, Customers, Management.
- Communicate Actual Progress against Stage Plan
- Create Roadmaps

Progressive (detailed) Planning

- Avoid detailed planning too early, stay Agile
- Add (only) Detailed Planning for Execution to early stages
- Identify Future Stages without Essential Flow with Stage Only Plan

Resource Planning

- Identify high-level Resource Requirements for the end-to-end Timeline at “Stage Level”

Financial Management

- Manage Project Financials with Stages and Budgets
- Manage Cashflow
- Track planned versus actuals

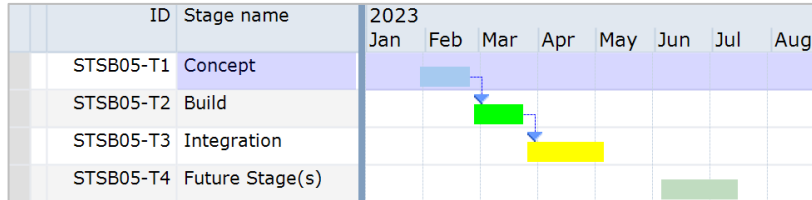
Portfolio Scenario Planning

- Create Scenario Stage Plans
- Run Scenario Wizard at “Stage Level” and/or “Detailed Level”
- Auto-Sizing of Stages
- 2-Level Scenario Planning

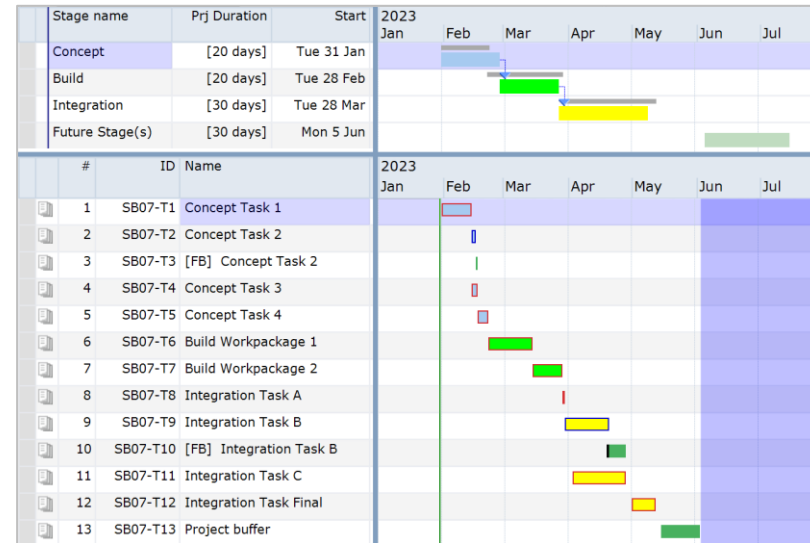
Enable Multi-Level Scenario Planning with Stages

Choose your Altitude: Stage, Detail, Integrated...

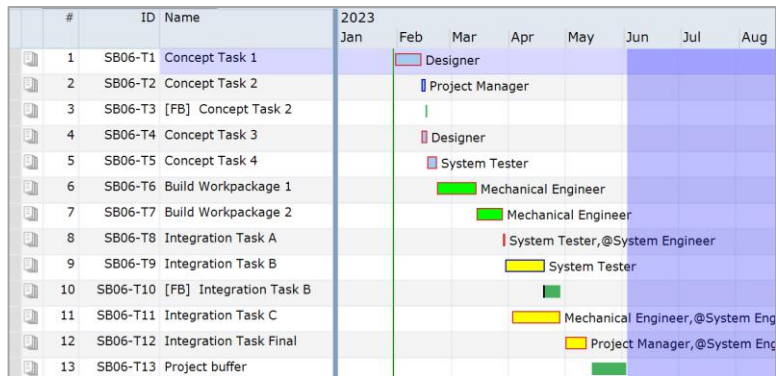
By Stage (Essential Flow)



Integrated: By Stage and Detailed Plan

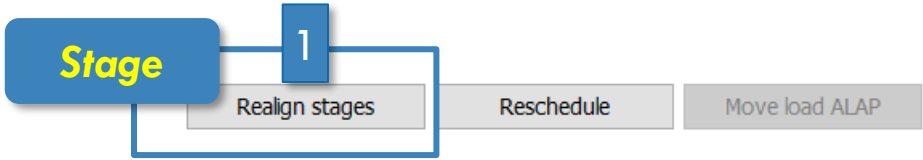


By Detailed Plan (Default)

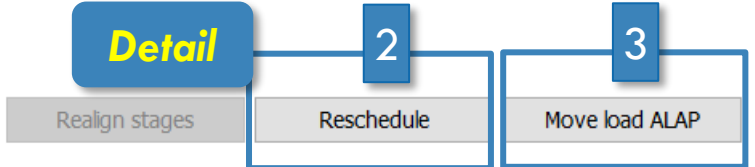


Scenario Wizard with Multi-Level Optimization

Choose your Altitude: Stage, Detail, Integrated...



ID	Priority	Description	PM	Delta	Status	Start	End	CCPM	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021
PLU	3	Pluto resource hours: 448h remaining: 416h - 92%	AC		Released	Tue 1 Dec	Thu 25 Feb 2021	clc/cc: 4d/42d pbp/pb: 7d/21d					
MAR	3	Mars resource hours: 544h remaining: 480h - 88%	AC		Released	Fri 4 Dec	Wed 10 Feb 2021	clc/cc: 6d/34d pbp/pb: 4d/17d					
JUP	3	Jupiter resource hours: 384h remaining: 384h - 100...	AC		Released	Wed 16 Dec	Tue 23 Feb 2021	clc/cc: 0d/34d pbp/pb: 1d/17d					

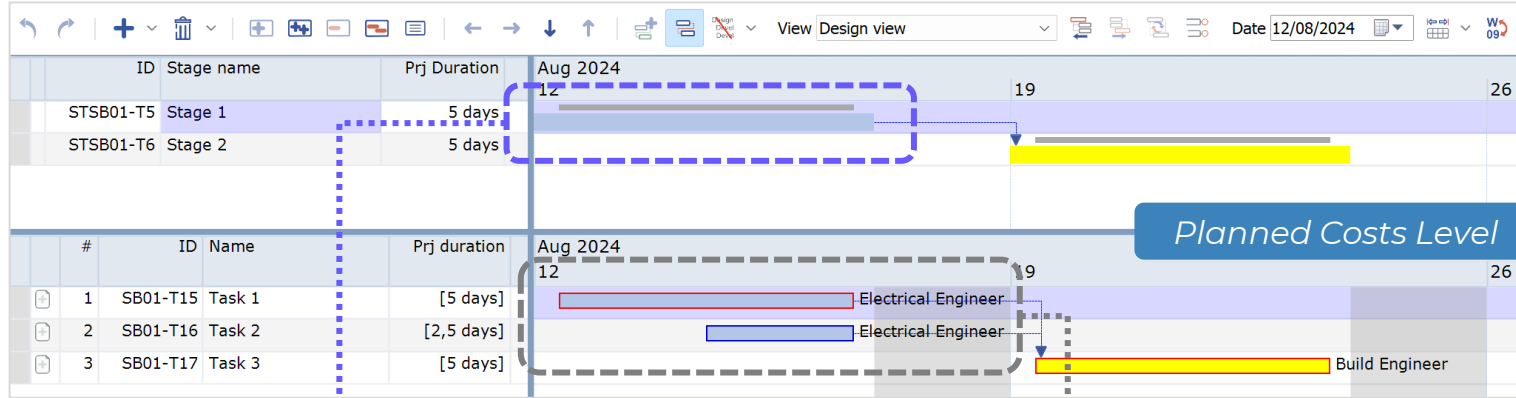


ID	Priority	Description	PM	Delta	Status	Start	End	CCPM	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021
PLU	3	Pluto resource hours: 448h remaining: 416h - 92%	AC	6 days	Released	Tue 1 Dec Wed 16 Dec 9:00	Thu 25 Feb 2021 Fri 5 Mar 2021 17:00						
MAR	3	Mars resource hours: 544h remaining: 480h - 88%	AC	26 days	Released	Fri 4 Dec Tue 19 Jan 2021 9:00	Wed 10 Feb 2021 Thu 18 Mar 2021 17:00						
JUP	3	Jupiter resource hours: 384h remaining: 384h - 100...	AC	35 days	Released	Wed 16 Dec Mon 1 Feb 2021 9:00	Tue 23 Feb 2021 Tue 13 Apr 2021 17:00						

Financial Management

Budget Hierarchy: Stage Budget → Planned Costs

Stage Budget Level



Planned Costs Level

STAGE Stage 1

Messages (0) General Staging Constraint Dates Resource requirements Dependencies Custom fields Visual Tracking Stage budget

Stage budget €7.000

Description	Group	Unit of measure	Price	Stage budget	Stage budget (€)	Planned	Planned (€)	Remaining	Remaining (€)
S: Electrical Engineer	Resource hours	Hours (€/h)	€70	60h	€4.200	60h	€4.200	60h	€4.200
CAPEX Item	CAPEX Items	Item (€/unit)	€2.000	1unit	€2.000	1unit	€2.000	1unit	€2.000
Bricks	Purchase Materials	Materials (€/kg)	€5	100kg	€500	120kg	€600	120kg	€600

Budget Grid

Finance properties

Budget group	Unit of measure
Resource hours	Hours
Purchase Materials	Materials
CAPEX Items	Item

Budget group used for resource assignments:
Resource hours

Budget grid Budget graph

Budgets

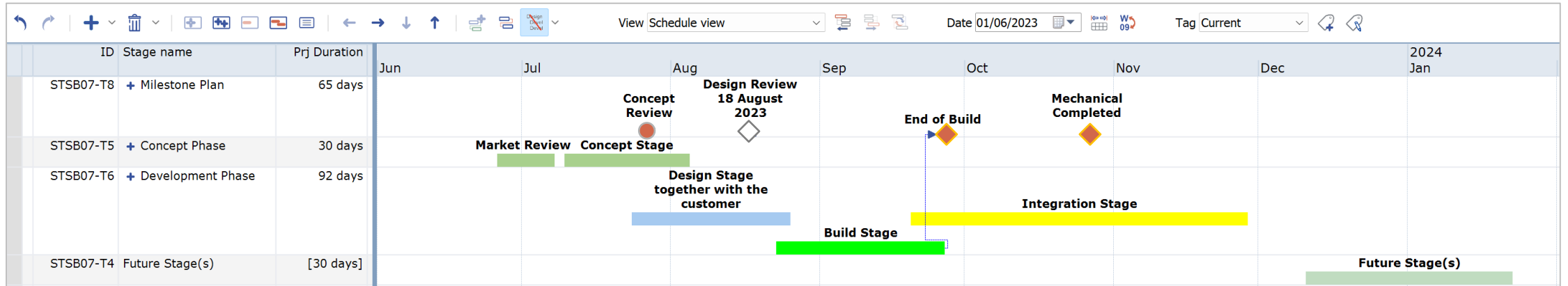
Description	Company quantities	Company budget (€)
- Project budget	sum: 92h, 1unit, 100kg	€9.000 (sum: €8.620)
- #ST1 - Stage 1	sum: 60h, 1unit, 100kg	€7.000 (sum: €6.700)
S: Electrical Engineer	60h (price: €70)	€4.200
CAPEX Item	1unit (price: €2.000)	€2.000
Bricks	100kg (price: €5)	€500
+ #ST2 - Stage 2	sum: 32h	€2.000 (sum: €1.920)

Planning

Task	Description	Price	Planned	Planned (€)	Remaining	Remaining (€)
#ST1 - Stage 1			sum: 60h, 120kg, 1unit	sum: €6.800	sum: 60h, 120kg, 1unit	sum: €6.800
T15 - Task 1	S: Electrical Engineer	€70	40h	€2.800	40h	€2.800
T16 - Task 2	S: Electrical Engineer	€70	20h	€1.400	20h	€1.400
T16 - Task 2	CAPEX Item	€2.000	1unit	€2.000	1unit	€2.000
T16 - Task 2	Bricks	€5	120kg	€600	120kg	€600

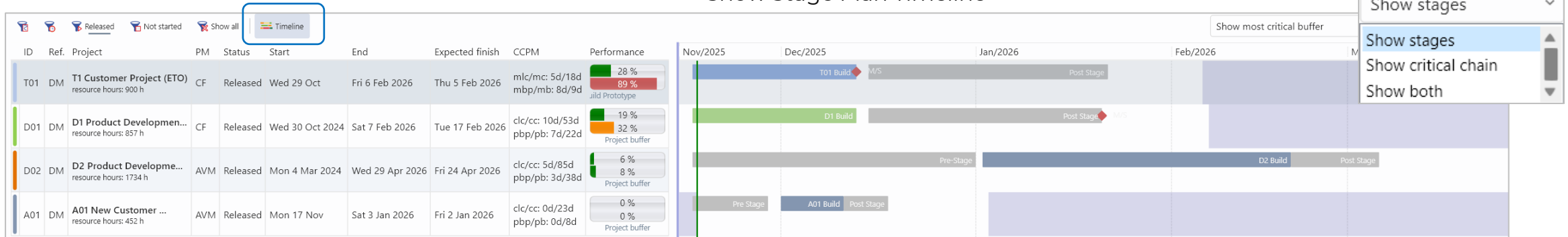
High Level Timelines

Communication with Stakeholders

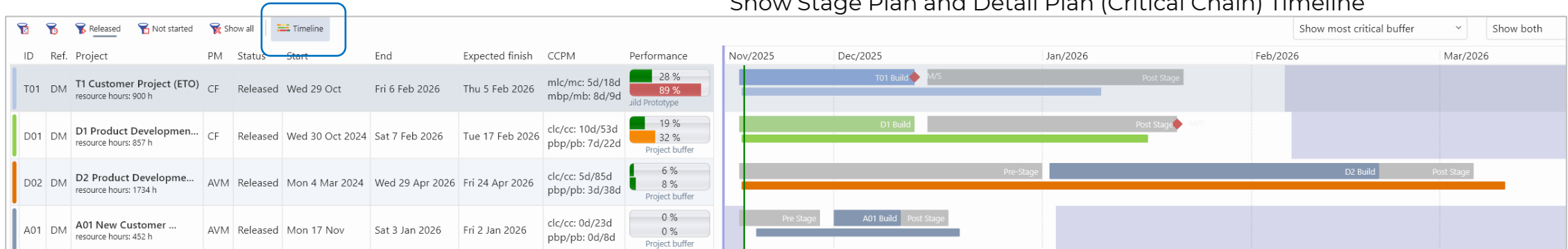


Portfolio Timelines

Show Stages: Show Stage Plan Timeline



Show Both: Show Stage Plan and Detail Plan (Critical Chain) Timeline



Thank You



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