# TPG CoReAdmin Guide 3.16

Version: 3.16.0
Status: 9/1/2025

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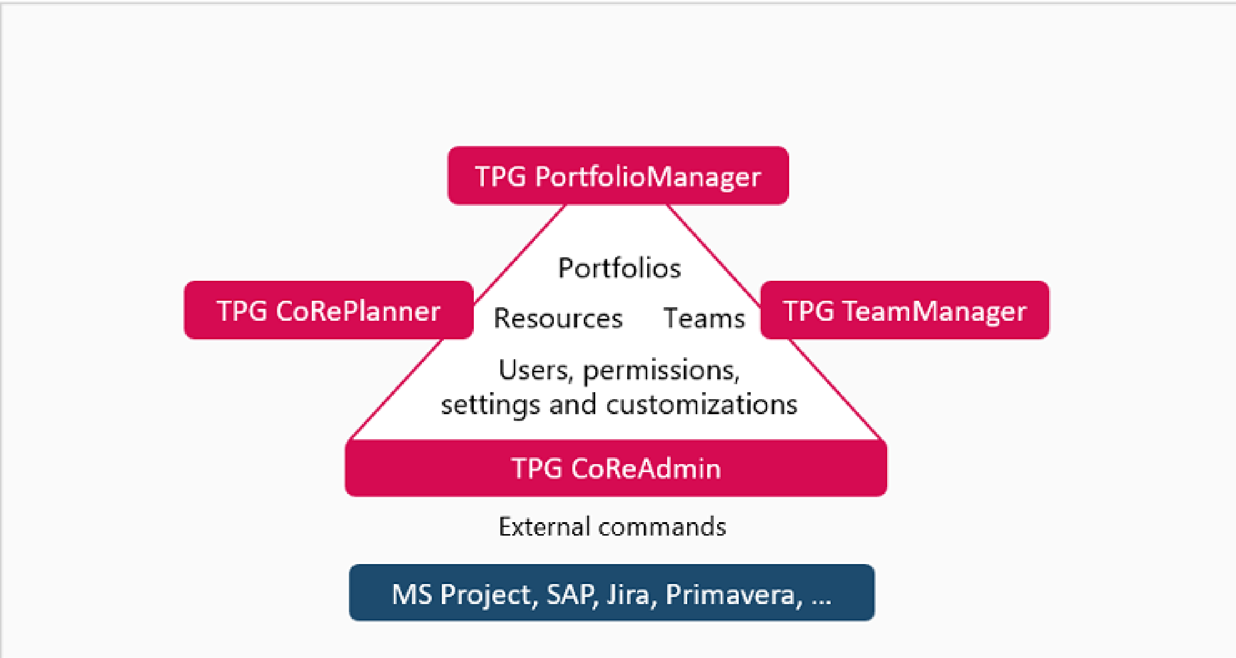
# 1 General Features

TPG CoReAdmin is the central administration tool for all components of the TPG CoReSuite.

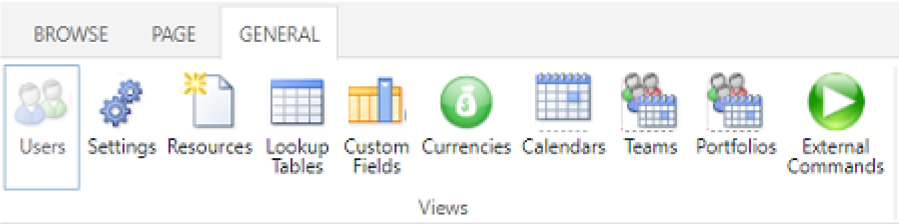
With TPG CoReAdmin, administrators control user permissions for TPG CoRePlanner, TPG TeamManager and TPG PortfolioManager. They administer resources and assemble teams or portfolios. Colors for charts and other features, currencies, custom fields, lookup tables and calendars can be configured according to the needs of the enterprise. External commands allow connecting to other source systems so that resources, projects and their properties can be imported into the CoReSuite.




# 2 Work Interface and Views

When you open TPG CoReAdmin, the *General* tab is opened by default. All functions are on the *General* tab.
The *Browse* and *Page* tabs belong to SharePoint and are not used for TPG CoReAdmin.

For each administrative category, there is an extra view:




*Users* is grayed out in the image above as it is the active view after opening TPG CoReAdmin.

Users 7: User management and general permissions

Settings 9: Change of settings like the histogram colors in TPG PortfolioManager, the timeline start, or check-in settings.

Resources 10: Adding/Editing resources and their properties

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Currencies 13: Listing currencies that can be used for projects and portfolios, definition of exchange rates

Calendars 15: Definition of calendars taking into account holidays and daily working hours

Teams 21: Assembling teams of resources, assignment of team roles to users, defining membership periods

Portfolios 24: Creating portfolios from projects and resources

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➤ In some views, there is no *Save* button. In these views, input data are saved automatically. If you do not want to keep the last changes, click the *Undo* button below the table.


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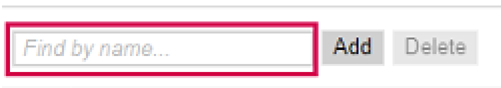
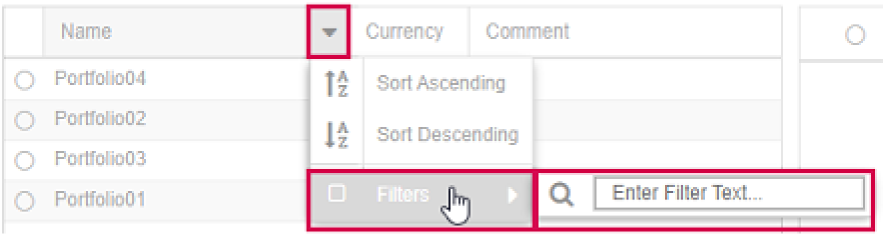
## 2.1 Row filters and sorting

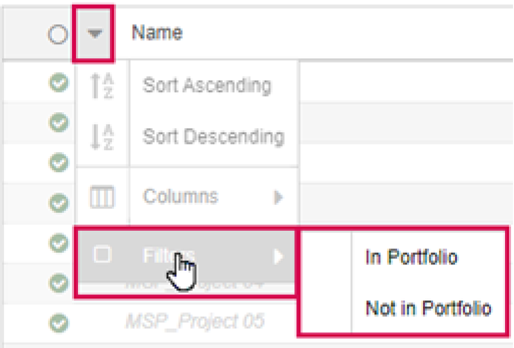
- To filter the rows of a table, type the beginning of the desired name in the search field above the table.



In the *Teams* and *Portfolios* views, you can filter the rows for specific features.

- Go to the header of the column you want to filter and click the arrow that appears.
- Go to *Filters* and select or enter the filter criteria.
  With the *Filters* checkbox in the drop-down menu selected, the filter will be applied. An underlined column header indicates that a filter is active.

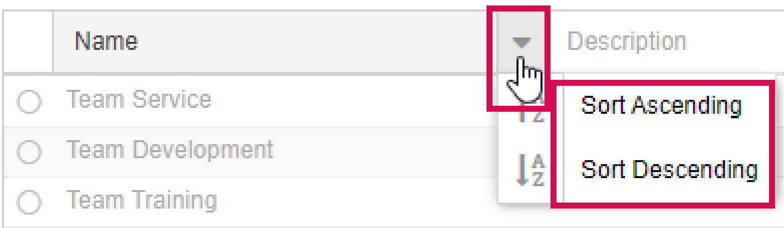



- To remove the filter, deselect the *Filters* checkbox in the drop-down menu.

The rows can be sorted ascending or descending.

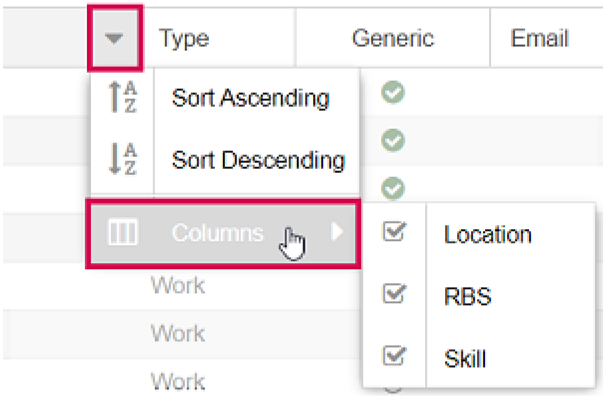
- Go to the header of the column by which you want to sort the rows.
- Click the arrow that appears and select the desired order.



## 2.2 Column filters

In some tables, you can customize the number of columns to be shown. The customization will be saved automatically.

- To define which columns are hidden or shown, go to the head cell of a column and click the arrow that appears.
- Go to *Columns* and deselect or select the respective checkboxes.




## 2.3 Expanding tables

Some tables in the *Calendars*, *Teams* and *Portfolios* views are not shown in their full width.

- To expand a table to its full width, click the arrow next to the *Add* button above the table.

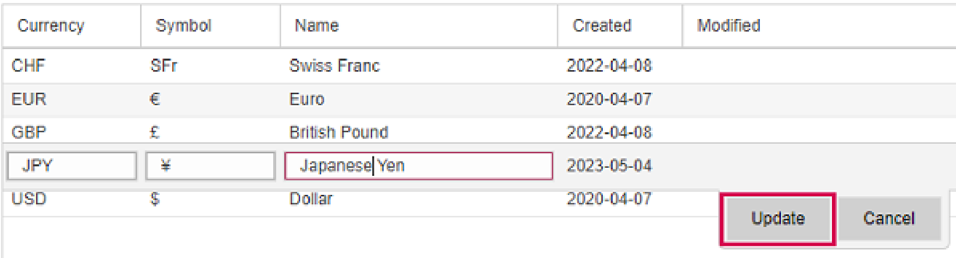

- To collapse the table, click the arrow again.

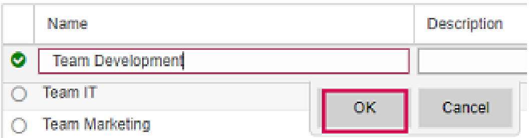
## 2.4 Editing of records

Most records can be edited after double-click in the respective row. Editable entries will be shown in an input field.

➤ In the *Teams* view, first select the team you want to edit and click *Edit mode* above the table.

- To finish editing, click *Update* or *OK* respectively.




# 3 Users

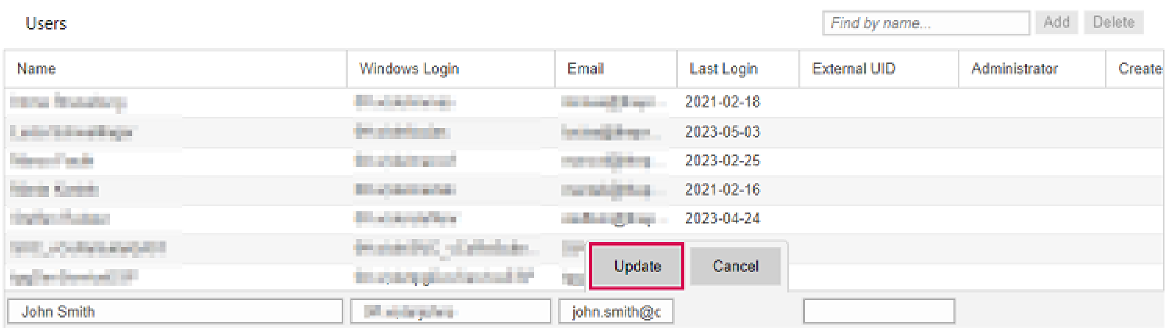

In this view, you add or delete users and define their access rights for the CoReSuite.

- To add a user, click *Add* on the right above the table.


- Fill out the fields.

  Empty fields with a red border are required.

  - Click *Update*.



- Click *Save* at the bottom left.
- Select the user to define their permissions.
- To grant access to components of the CoReSuite, select the appropriate checkboxes in the *Product Type* table (1).
- In the *Permissions* table, select the permissions you want to grant to the user (2).

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➤ To be able to create and edit scenarios, a user of TPG PortfolioManager needs at least *Create Portfolio* permissions and access to TPG CoReAdmin. Alternatively, you can grant the user *Administrator* permissions for TPG PortfolioManager. This includes extensive permissions also in CoReAdmin.
For users of TPG TeamManager, you specify permissions on individual teams by assigning roles in the *Teams* 21 view.

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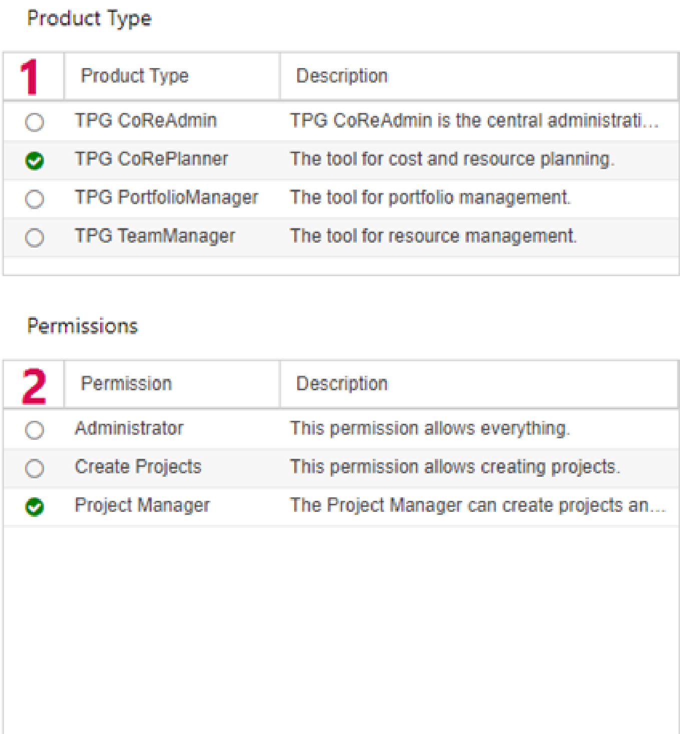
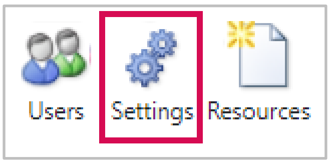



For permissions to edit specific teams or portfolios, refer to Teams 22 or Portfolios 24.

- If you want to delete a user, select them and click *Delete* on the right above the table.

# 4 Settings




In the *Settings* view, you can define the timeline start and other features on separate tabs for Portfolio and Planner.

- To change a setting, double-click in the corresponding row of the *Value* column.
- Enter the desired value, or open the drop-down menu and select an option.
- Click *Save* at the bottom left.

**Both tabs**

*Timeline Start* and *Timeline Start Value*: If *Timeline Start* is set to *Dynamic*, the timeline will start with the current month of the year.
If *Timeline Start* is set to *Fixed,* the month of the timeline start is defined by the *Timeline Start Value.* The timeline will start with the indicated month of the current year, regardless of whether this month is in the past or the future.

***Portfolio* tab**

*Display Baseline Start and Finish by default*: If the value is set to *Yes*, the *Baseline Start* and *Baseline Finish* columns will be shown in the scenario table of TPG PortfolioManager by default. The user can hide the columns.

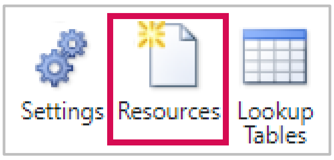
*Gantt bar* and *Histogram* color settings: Gantt bars show the duration of projects in a scenario, histograms the resource utilization. Values for the colors can be entered as names or hex codes. For a list of named HTML colors, you can refer to websites like HTML Color Groups (w3schools.com).

***Planner* tab**

*Automatic Check-in on Close:* If the value is set to *Yes*, projects will automatically be set to read mode when they are closed. Other users who have permission can edit the projects.

*Visible Fields in Project Information Dialog:* Select the custom fields 12 to be displayed when the *Info* button is clicked in an opened project.

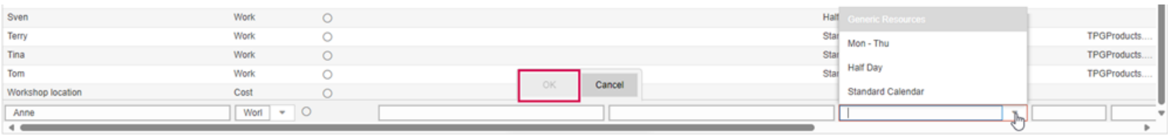
# 5 Resources




In this view, you add or delete resources. Work resources must be linked to a calendar to calculate their capacity.

- To add a resource, click *Add* on the right above the table.

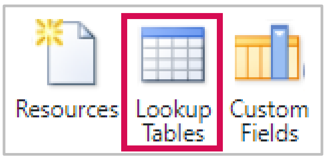

- Fill out the fields.
  Empty fields with a red border are required fields.
  In the *Type* field, select *Work* from the drop-down menu.
  - Click *Update*.




- If you want to delete a resource, select them and click *Delete* on the right above the table.


For organizing resources in teams, see Teams 21.

# 6 Lookup Tables



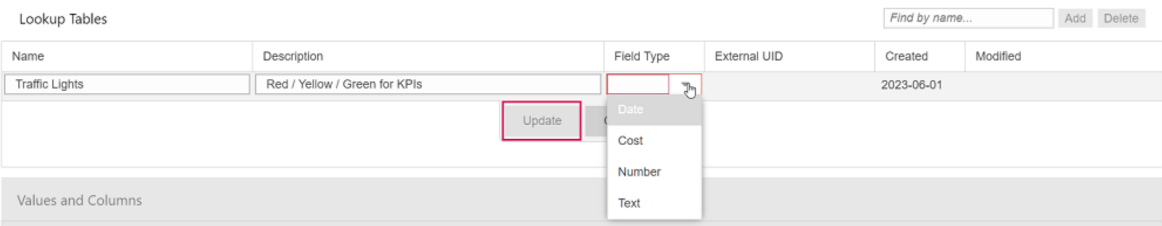

With lookup tables, you define a list of options for entries in custom fields.

- To add a lookup table, click *Add* on the right above the *Lookup Tables* table.


- Fill out the form.

  The *Name* and the *Field Type* fields are required.

  - Click *Update*.




- Add the first value: Click the left button above the *Values and Columns* table.
  - Depending on the field type, type a value or select a date from the calendar.
  - Press the Enter key or click outside the field to finish.


- Optionally, enter a description of the value.

  The *Description* field can be edited after a double-click in the cell.

- Define further values, their order and outline levels by using the buttons.


1) Adds a new row below the selected item.
2) Adds a new row above the selected item.
3) Deletes the selected item.
4) Moves the selected item up by one row.
5) Moves the selected item down by one row.
6) Indents the selected item.
7) Outdents the selected item.

- Click *Save* at the bottom left.

When the lookup table is complete, link it to a custom field 12.

➤ Once a lookup table is linked to a custom field, the lookup table cannot be deleted.

- If you want to delete a lookup table, select it and click *Delete* on the right above the *Lookup Tables* table.

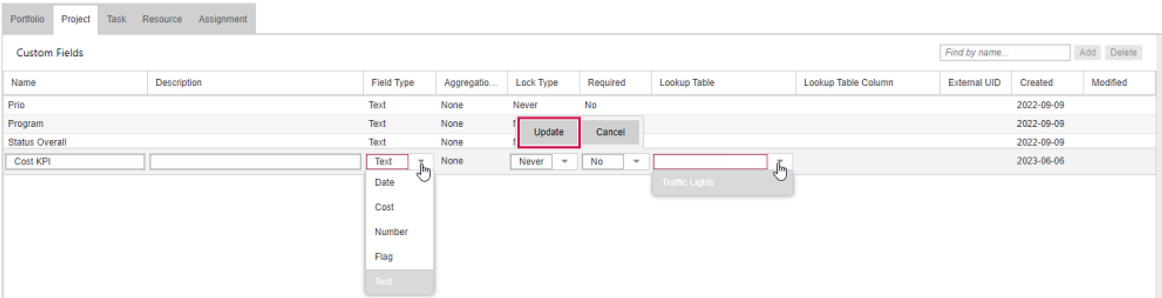
# 7 Custom Fields


Custom fields can be defined for portfolios, projects, tasks, resources and assignments.

➤ If you want to add a custom field with drop-down selection, first make sure an appropriate lookup table exists. Once the custom field is created and saved, it cannot be linked to a lookup table.

- To add a custom field, open the corresponding tab and click *Add* on the right above the table.


- Fill out the form.
  The *Name* and the *Field Type* fields are mandatory.
  - If you want the custom field to be filled by selecting an option, fill out the *Lookup Table* field.
    The drop-down menu shows only the lookup tables of the corresponding field type.
  - Click *Update*.




- Click *Save* at the bottom left.

- If you want to delete a custom field, select it and click *Delete* on the right above the table.

# 8 Currencies


The standard currencies of the CoReSuite are CHF, EUR, GBP and USD. Standard currencies cannot be deleted.

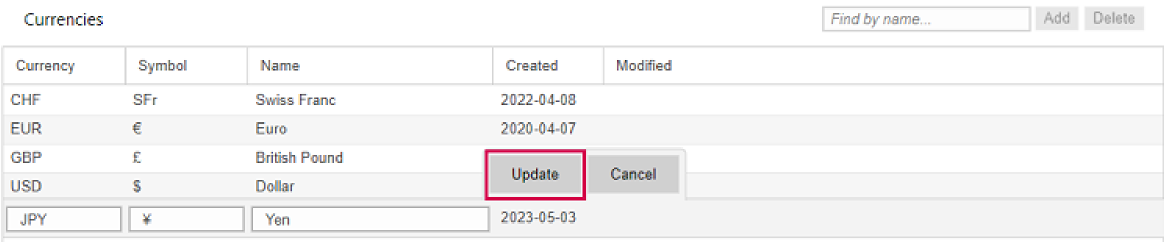
You can add custom currencies:

- Click *Add* on the right above the table.

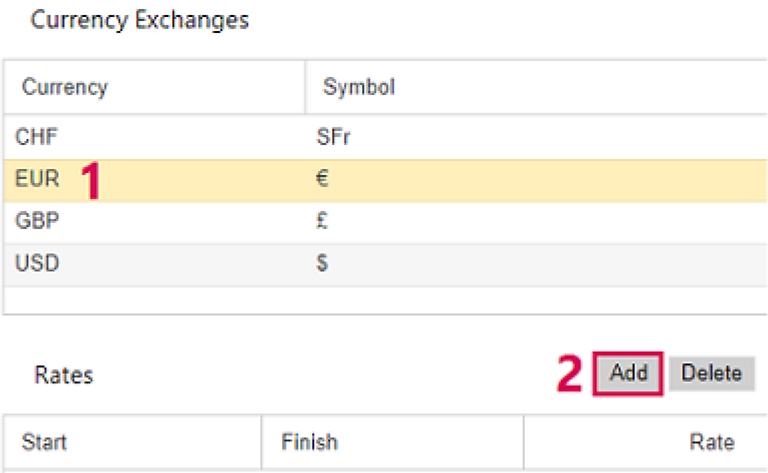
- Fill out the fields.

  The *Name* field is required.

  - Click *Update*.



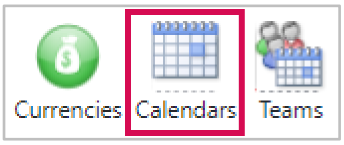

- To define an exchange rate, select the base currency in the *Currencies* table.
- Select the counter currency in the *Currency Exchanges* table (1).
- Click *Add* on the right above the *Rates* table (2).




- Fill out the fields.

  To enter the start and finish date, click the respective calendar icon and select a date.
- Click *Update*.
- Click *Save* at the bottom left.
- If you want to delete a non-standard currency, select it and click *Delete* above the table.

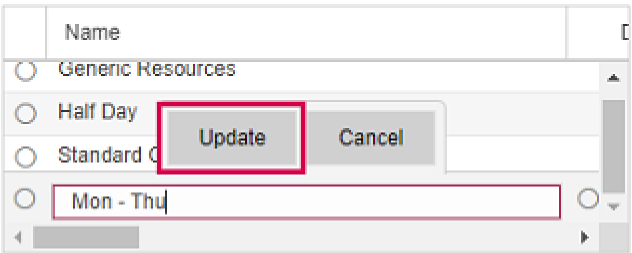
# 9 Calendars



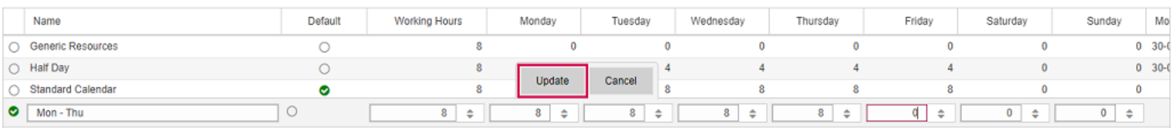

The Standard Calendar is defined as eight work hours per day from Monday to Friday. You can edit the calendar or add a new one.

- To add a calendar, click *Add* above the *Calendars* table.


- Enter a name for the calendar and click *Update*.




- Expand the table.
- If you want the calendar to be used as default, select the checkbox in the *Default* column.
- Define the number of work hours for each day of the week and click *Update*.

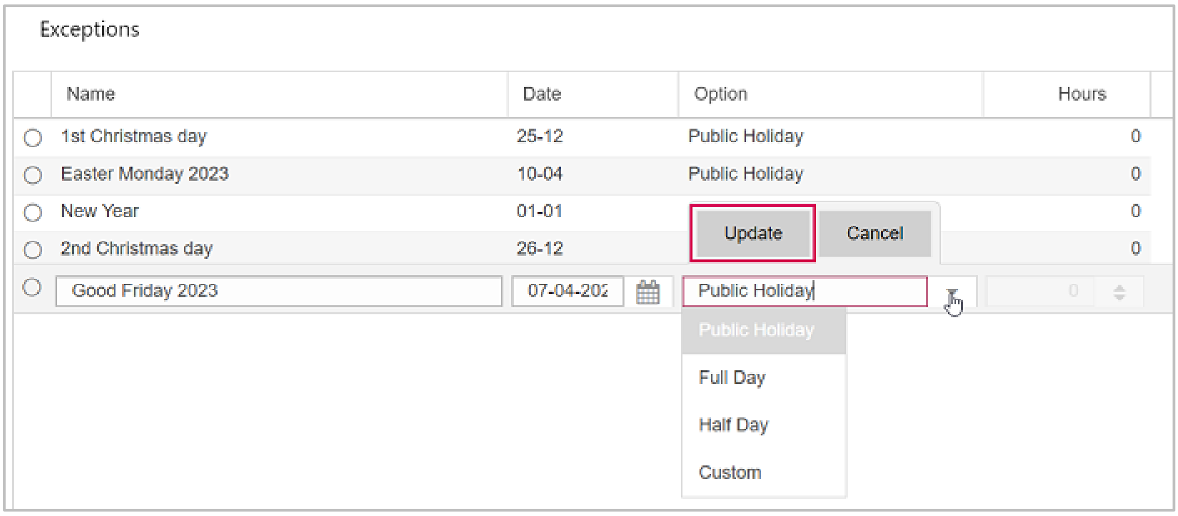



The next step is to add workday exceptions 19 to the calendar. If the *Exceptions* table does not contain the necessary dates, first define exceptions 16.

## 9.1 Defining exceptions

The *Exceptions* table provides a list of holidays from work that can be added to specific calendars per year.

- To add an exception, expand the *Exceptions* table and click *Add* above the table.
- Fill out the fields.
  The date is selected from the calendar of the current year but only day and month will be relevant. The exceptions in this list can be linked to any year of a calendar. Therefore, it is recommended to add the year to the name of dynamic holidays.
  The default value in the *Options* column is *Public Holiday*. For other kinds of exceptions, select an option. With *Custom*, you can define the number of work hours for that day in the *Hours* column.
  - Click *Update*.



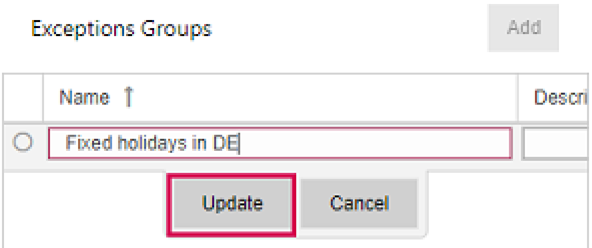

The exceptions can be added to a calendar 19 individually or in groups.

## 9.2 Grouping exceptions

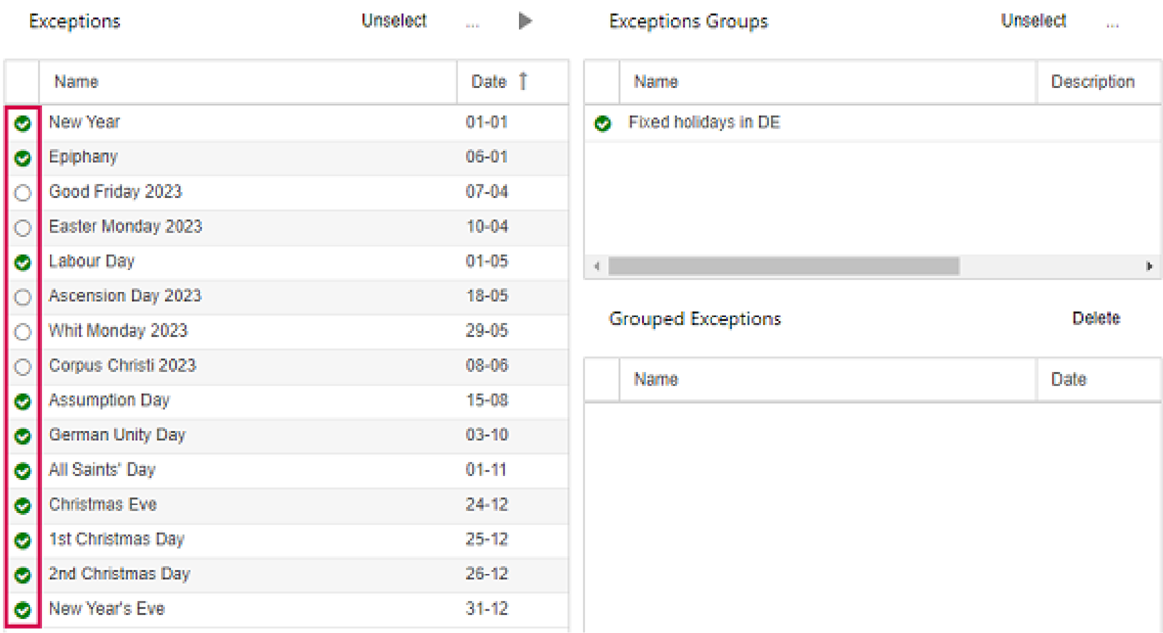
To simplify the allocation of exceptions to calendars, exceptions can be grouped. For example, you can define a group of fixed holidays or groups of holidays recognized in specific regions.

- Click *Add* above the *Exceptions Groups* table.

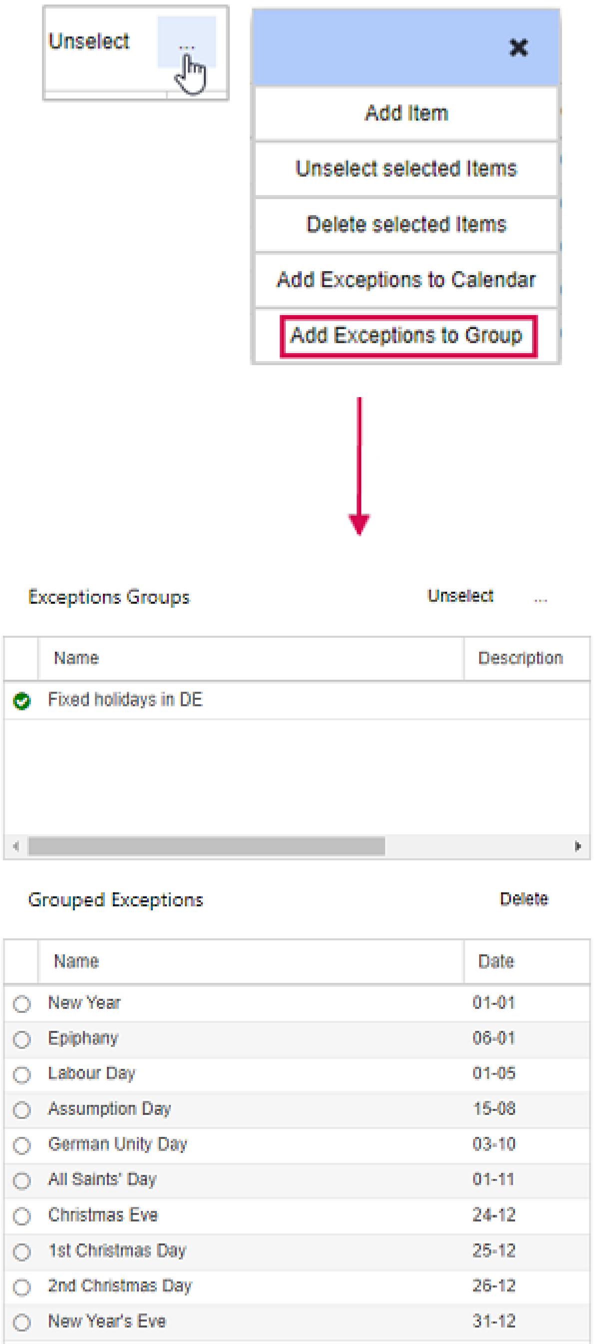
- Fill out the form and click *Update*.




- Select the exceptions you want to group and the group.




- Click the three dots above the *Exceptions* or the *Exceptions Groups* table and select *Add Exceptions to Group*.
  The exceptions will be shown in the *Grouped Exceptions* table.



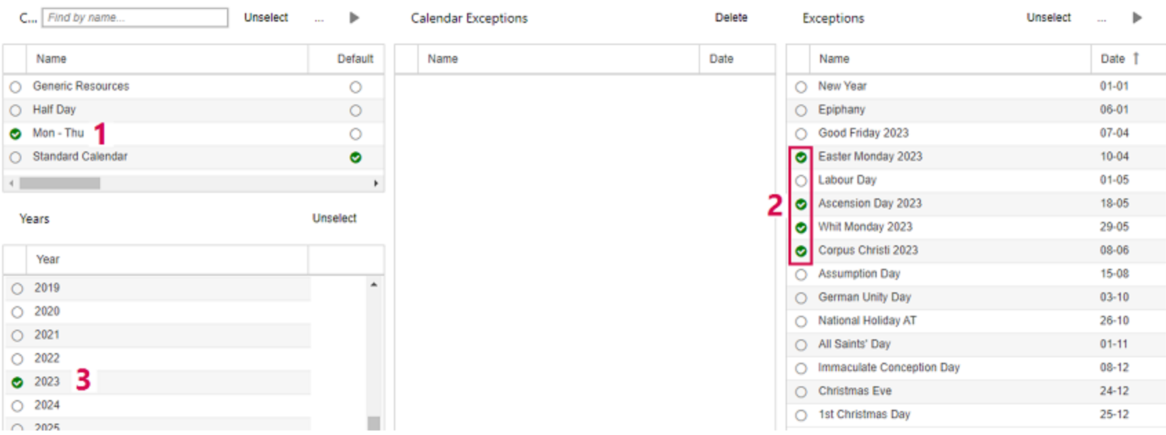

- If you want to delete an exception from the group, select it in the *Grouped Exceptions* table and click *Delete* above the table.

## 9.3 Adding exceptions to calendar

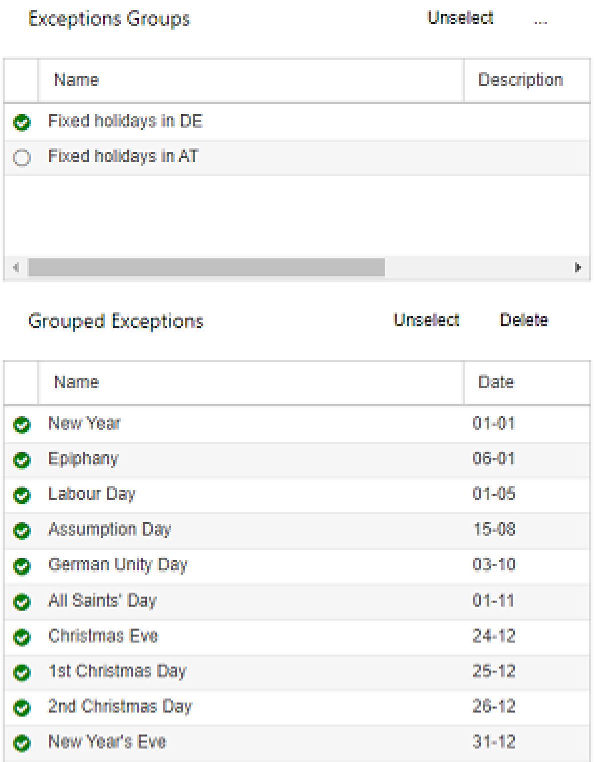
Workday exceptions can be added to calendars per year. It is possible to add exceptions to more than one year at a time.

You can select individual exceptions or groups of exceptions to add to a calendar.

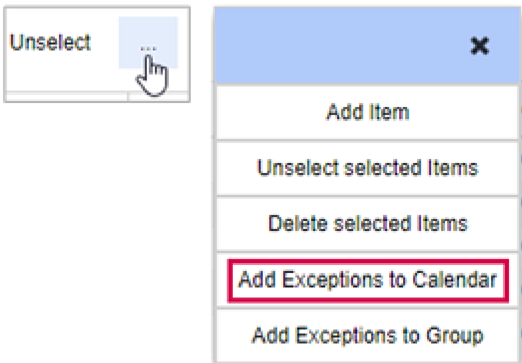
- Select the calendar and the year(s) to which you want to add exceptions (1, 3).
- To add individual exceptions, select the items you want to add in the *Exceptions* table (2).

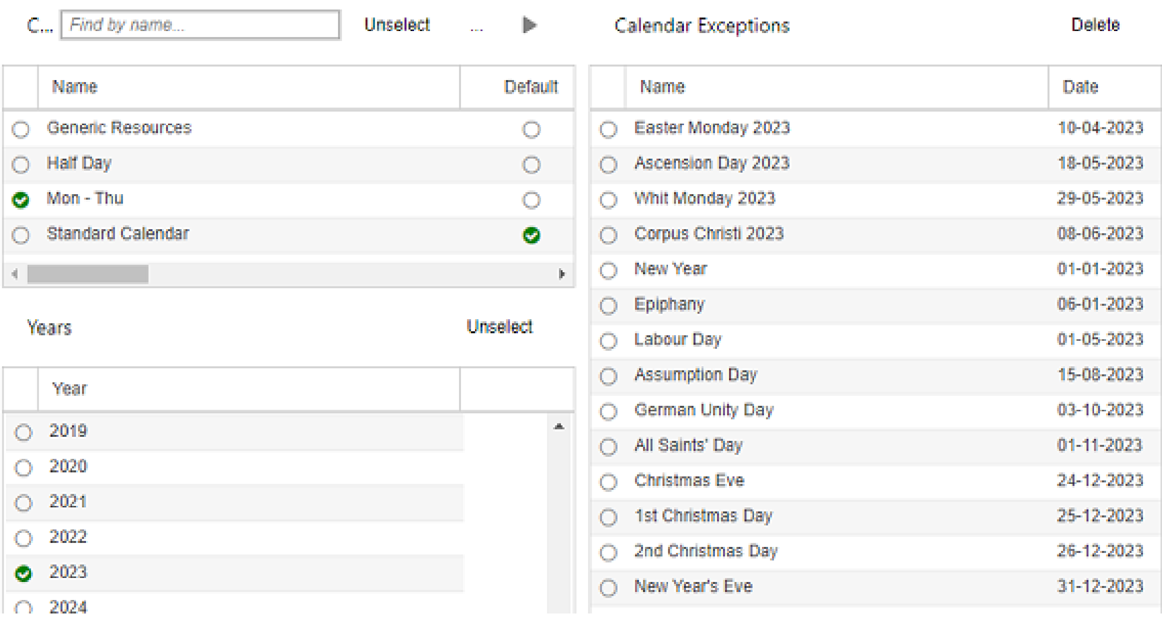



- Alternatively, select one or more groups in the *Exceptions Groups* table.
  - If the group contains items you do not want to include, deselect them in the *Grouped Exceptions* table.



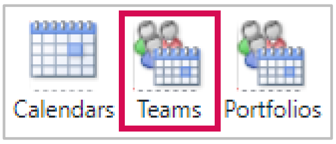

- Click the three dots above the table from which you selected the items and select *Add Exceptions to Calendar*.
  The exceptions will be shown in the *Calendar Exceptions* table.
  In the example below, individual exceptions and the group were added subsequently. After refreshing the page, the exceptions will be sorted by date.






- If you want to delete an exception from the calendar, select it in the *Calendar Exceptions* table and click *Delete* above the table.

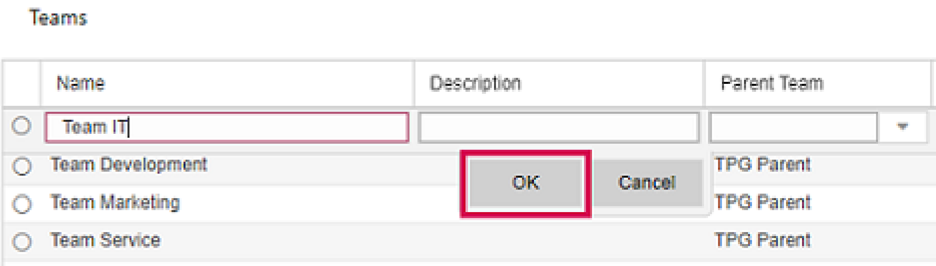
# 10 Teams



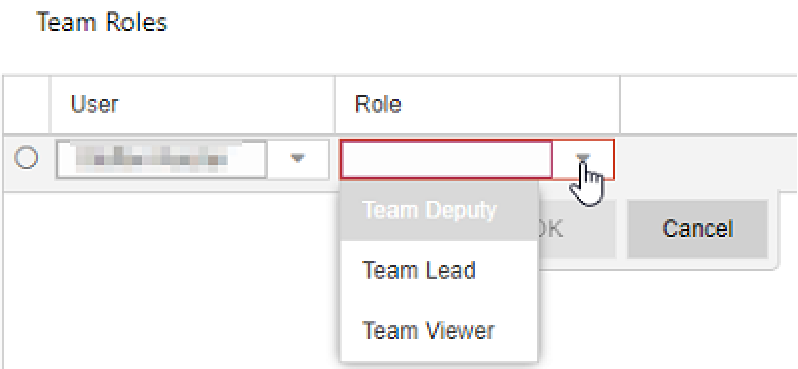

In this view, you add or delete teams, grant permissions to specific users, and define team members and their membership periods.
Teams can be organized in parent teams and sub-teams. Members of a sub-team will **not** automatically be members of the parent team.

- To add a team, click *Add* above the *Teams* table.
- Fill out the fields.
  The *Name* field is required.
  To convert the team into a sub-team, select the parent team from the drop-down menu in the *Parent Team* column.

- Click *OK*.



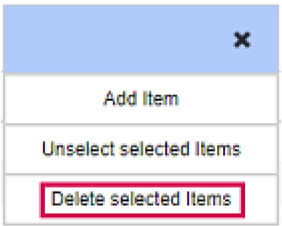

- Select the checkbox next to the team name to define related user permissions.
- Click *Add* above the *Team Roles* table.
- Select a user and their role from the drop-down menus.
  A *Team Lead* and a *Team Deputy* can edit the team plan in TPG TeamManager.
  A *Team Viewer* has only read access to the team plan.
  A team can have several deputies or viewers but only one team lead.
  - Click *OK*.




The next step is to add resources as team members 23.

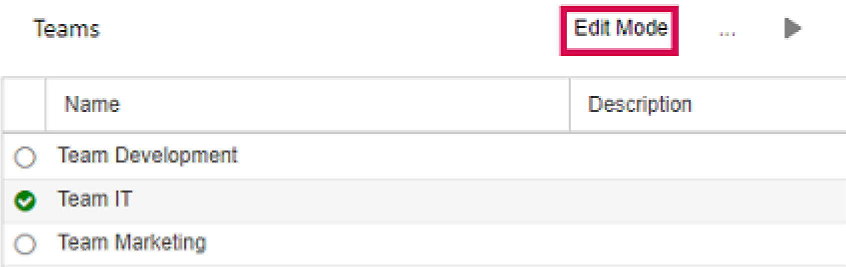
**Withdrawing user permissions**

- Select the team in the *Teams* table and the user in the *Team Roles* table.
- Click the three dots above the *Team Roles* table and select *Delete Selected Items*.

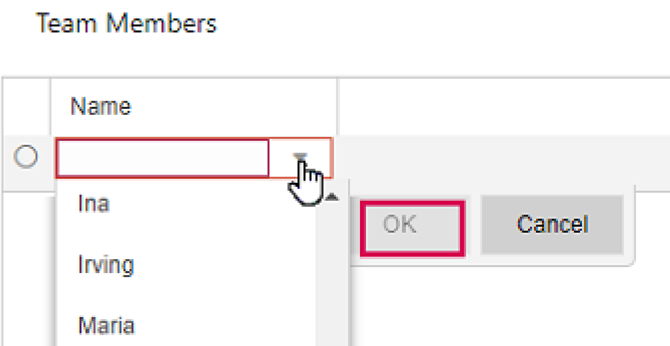



## 10.1 Assembling/Editing a team

- In the *Teams* table, select the team you want to assemble or edit.
- Click *Edit Mode* above the table.




- To add a resource, click *Add* above the *Team Members* table.
- Select a resource from the drop-down menu and click *OK*.



# 11 Portfolios

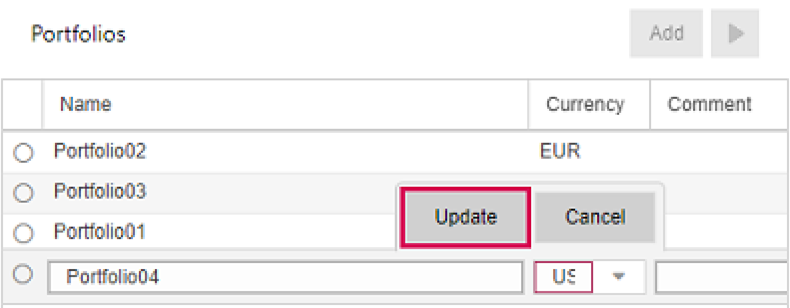

➤ The user who creates a portfolio will automatically be the owner of the portfolio. Currently, the owner cannot be changed. Only the owner can create and edit scenarios based on the portfolio in TPG PortfolioManager. Therefore, write permissions in TPG PortfolioManager require the permission to create portfolios in TPG CoReAdmin.

- To create a portfolio, click *Add* above the *Portfolios* table.
- Fill out the fields.

  Empty fields with a red border are required.

  The *Owner* field shows the name of the current user. This value cannot be changed.

  - Click *Update*.



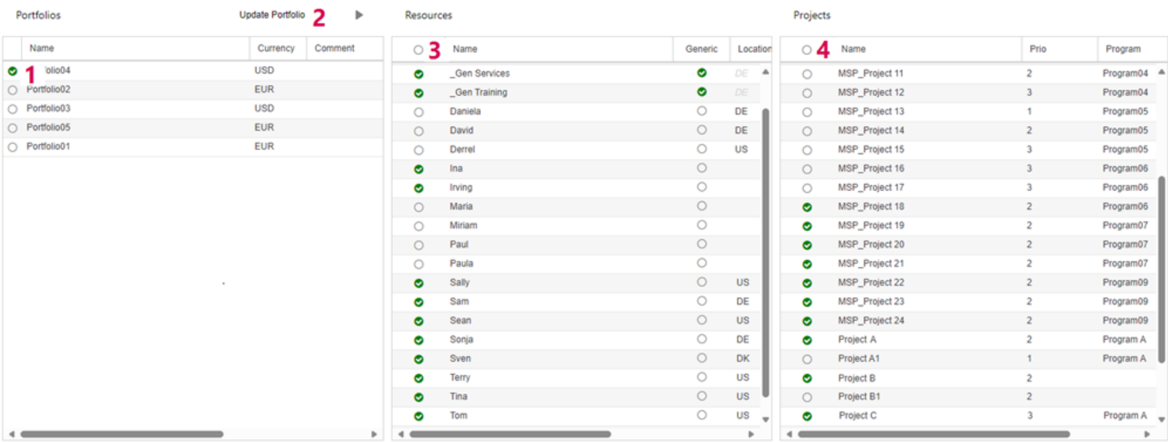

- Select the portfolio (1).

  The *Resources* table will show all available resources.
- Select the resources you want to include in the portfolio (3).

  The *Projects* table will show the projects to which the selected resources are assigned.
- Select the projects you want to include in the portfolio (4).

➤ It is possible to add but not to delete portfolio resources and their projects later. In TPG PortfolioManager, resources and projects can be deleted from the scenarios.

▪ Click *Update Portfolio* above the *Portfolios* table (2).
  With this click, a scenario based on this portfolio will automatically be created in TPG PortfolioManager.




## 11.1 Editing a portfolio

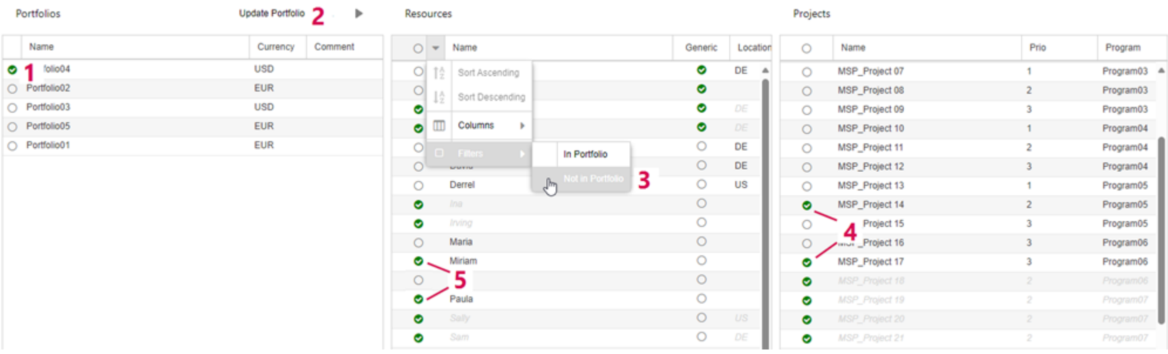
Sometimes it may be necessary to add further resources and their projects to an existing portfolio:

▪ Select the portfolio in the *Portfolios* table (1).
  In the *Resources* and the *Projects* table, items that are already in the portfolio are grayed out. They cannot be removed.

▪ For a better overview, you can filter 4 the *Resources* or *Projects* table for items that are not yet in the portfolio or by other criteria (3).

▪ Select the resources or projects you want to add (4, 5).

▪ Click *Update Portfolio* above the *Portfolios* table (2).

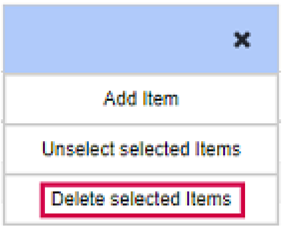



It is also possible to delete or rename a portfolio.

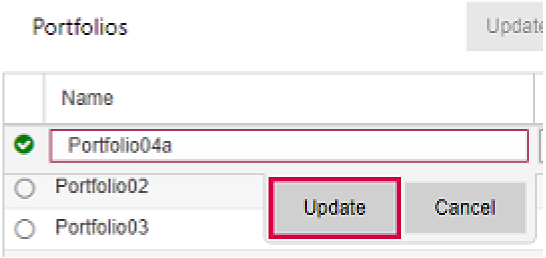
⚠ Deleting or renaming a portfolio means deleting the scenarios based on it in TPG PortfolioManager. Make sure the scenarios are no longer needed before you delete or rename the underlying portfolio.

- To delete a portfolio, select it in the *Portfolios* table and click the three dots above the table.


  - Select *Delete selected Items* from the drop-down menu and confirm with *Yes* in the warning prompt that appears.




- To rename a portfolio, select it and double-click its name.
  - Edit the name and click *Update*.


Portfolios
Update
Name
Portfolio04a
Portfolio02
Portfolio03
Update
Cancel