TPG CoRePlanner 3.16

Version: 3.16.0
Status: 9/4/2025

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1 General Features

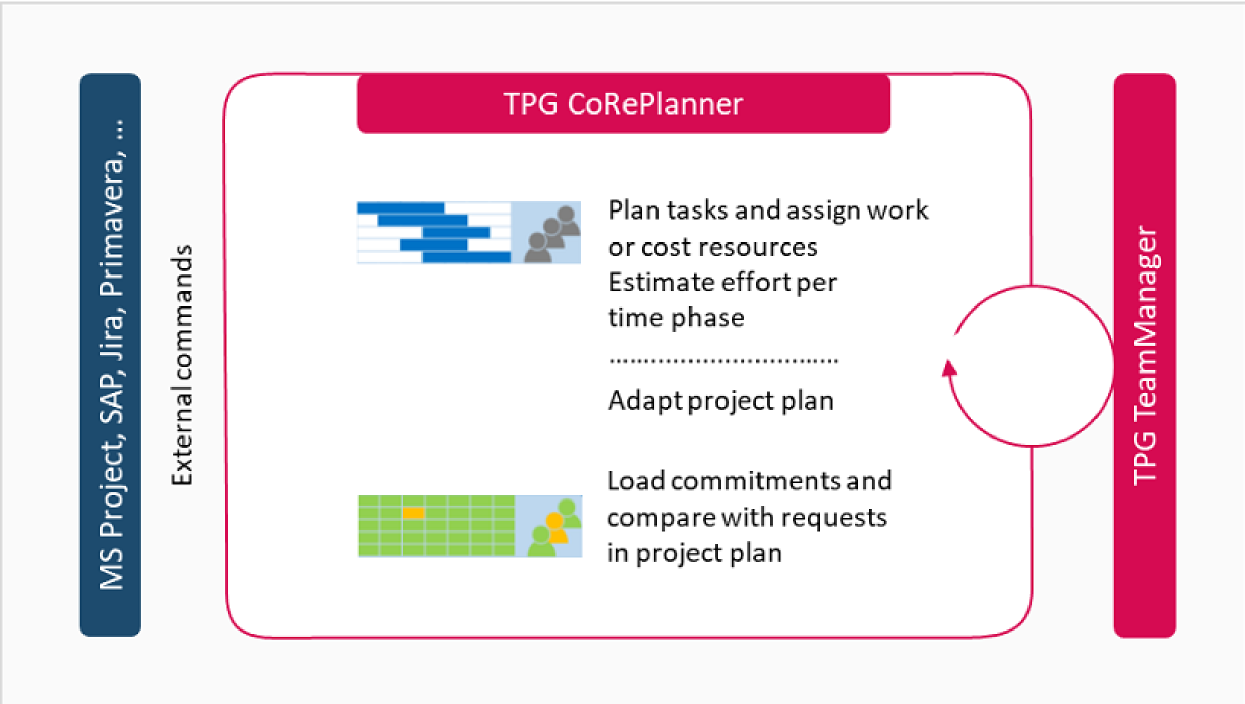
TPG CoRePlanner is a tool for structured planning of project effort and cost in time phases.

In contrast to conventional project planning tools, planning is not based on the duration of tasks but on the available work and cost resources.

Project managers break down the work into tasks, assign the tasks to work or cost resources and give an estimate of effort or cost per phase on the timeline. Work effort is converted into cost by flexible rates.

➤ In the actual version of TPG CoRePlanner, cost values are not yet supported. The project plan shows work values only.

Additional information such as cost centers or types can be given in custom fields. Via an integration tool like TPG PSLink, records can be transferred from and to the ERP system or other management software.

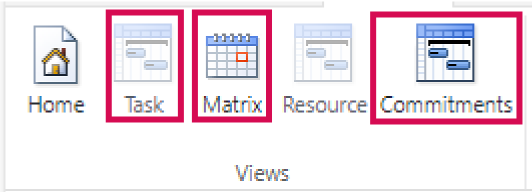


2 Work Interface and Views

When you open TPG CoRePlanner, the *General* tab is opened by default. Most functions of TPG CoRePlanner are on this tab.

The *Browse* and *Page* tabs belong to SharePoint and are not used for TPG CoRePlanner.

There are three views for planning which can be accessed via the buttons in the *Views* group of the *General* tab:



Task 6: Main view for task planning. Shows the project tasks with assigned resources as sub-items

Matrix 13: Assignment of resources to tasks in a matrix view

Commitments 6: Shows the resource commitments made by the team managers.

➤ To switch from the *Task* view to another view, the project summary task must be selected.

The *Settings* tab and the *Advanced* tab are not yet active in the actual version of TPG CoRePlanner.

2.1 Table views

The *Task* and *Commitments* views show a table with tasks or resources on the left and a timeline with work values on the right.
The *Total* column in the left part summarizes the values of each row under the timeline.

➤ When opened for the first time, the left part of the tables shows only the *Name* column. For showing more columns, see Column filters and rearrangement 9.

2.1.1 Task

Task is the main view for task planning and maintenance of the data. When a project has newly been created (see Creating a project 20) or is opened (see Checking in and out 21), the *Task* view opens by default.

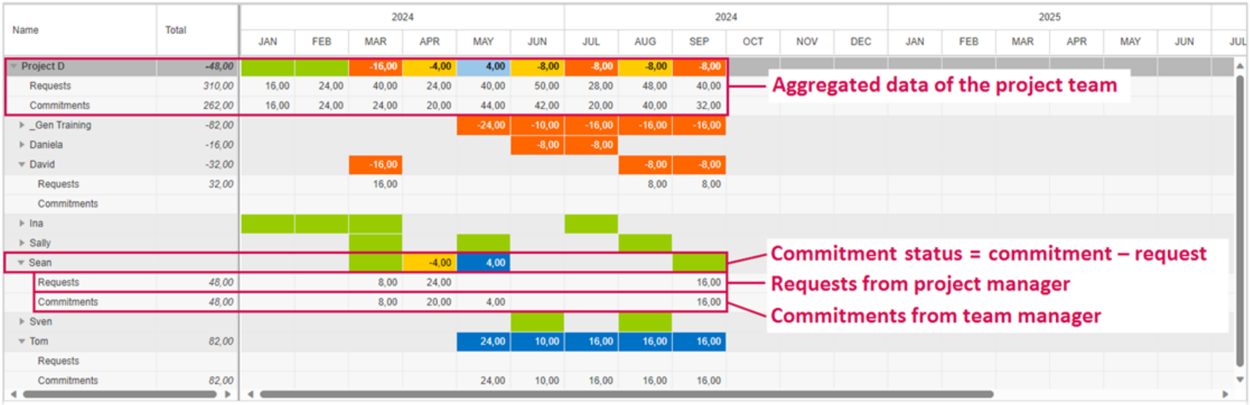
The table shows the project plan organized by tasks with assigned resources as sub-items. Work hours are assigned to the resources in the white rows under the timeline.

The gray rows are read-only. They show the aggregated data of the assigned resources per task and time phase.

Name	Total	2023 DEC	2024 JAN	FEB	MAR	APR	MAY	JUN
Project D [€]	*310,00*		16,00	24,00	40,00	24,00	40,00	50,00
Task 1	*48,00*		16,00	24,00	8,00			
Ina	*48,00*		16,00	24,00	8,00			
Task 2	*104,00*				32,00	24,00	16,00	32,00
Task 2.1	*16,00*				16,00			
David	*16,00*				16,00			
Task 2.2	*56,00*				16,00	24,00	16,00	
Sally	*24,00*				8,00		16,00	
Sean	*32,00*				8,00	24,00		
Task 2.3	*32,00*							32,00
Sven	*32,00*							32,00

2.1.2 Commitments

Commitments is the view to get commitments or suggestions from the team managers and to adapt the project plan to resource availability.
The view comprises two tables. The upper table shows the resources with their requested and committed project work.
The values in the colored cells show the individual commitment status of each resource, calculated by commitment minus request. Green cells without value indicate that the difference between request and commitment is zero.



The commitment status is shown in heatmap colors according to preset thresholds.

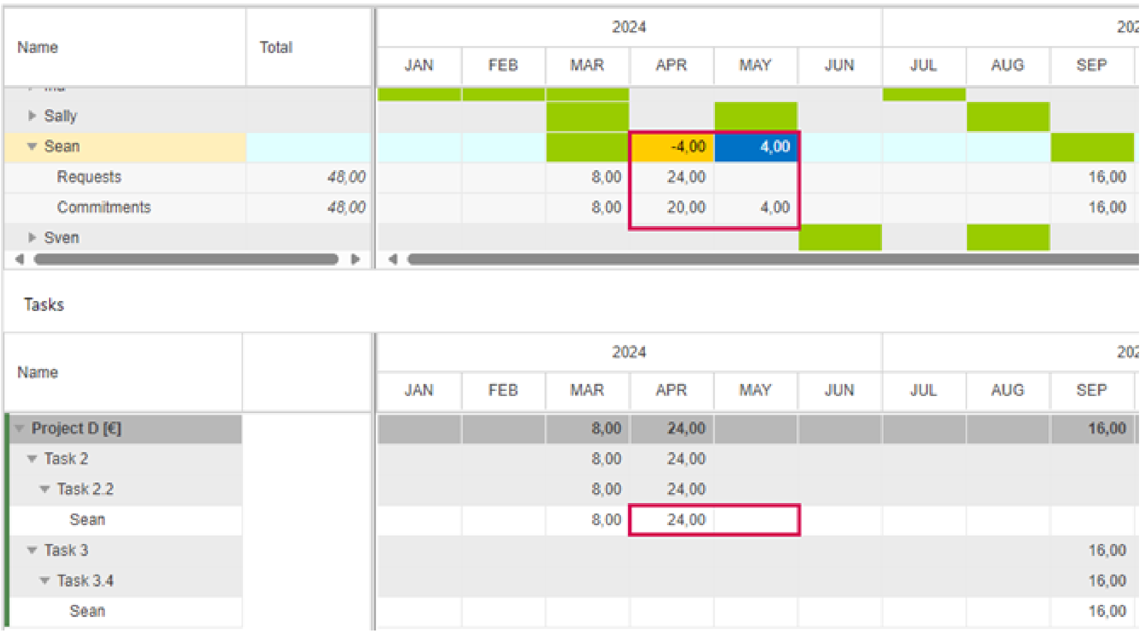
lower	-20%	-10%	0%	10%	20%	higher

The lower table (*Tasks*) shows part of the project plan depending on the cursor position in the upper table.

When a cell of the project summary task is clicked in the upper table, the lower table shows the entire project plan.

When any other cell is clicked in the upper table, the lower table shows the tasks and work data of the corresponding resource. Here, you adapt the project plan.

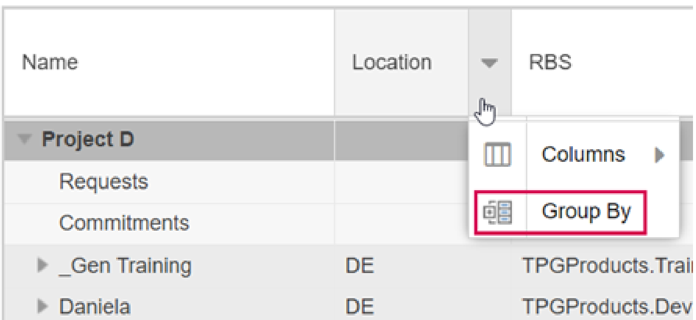
The example below shows the data of Sean. His work data for April and May need to be adapted in the *Tasks* table.



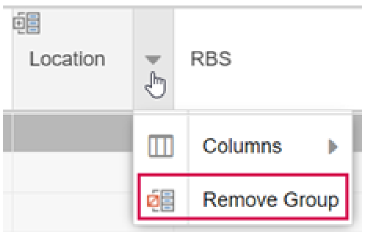
2.1.3 Row grouping

In the *Commitments* view, you can group the rows of the table by specific column entries. Multiple groupings are possible. The first grouping performed is the main grouping.

- Go to the desired column header, click the arrow that appears and select *Group By*.
  The grouping will be indicated by an icon in the column header.



- To undo the grouping, click the arrow in the column header and select *Remove Group*.



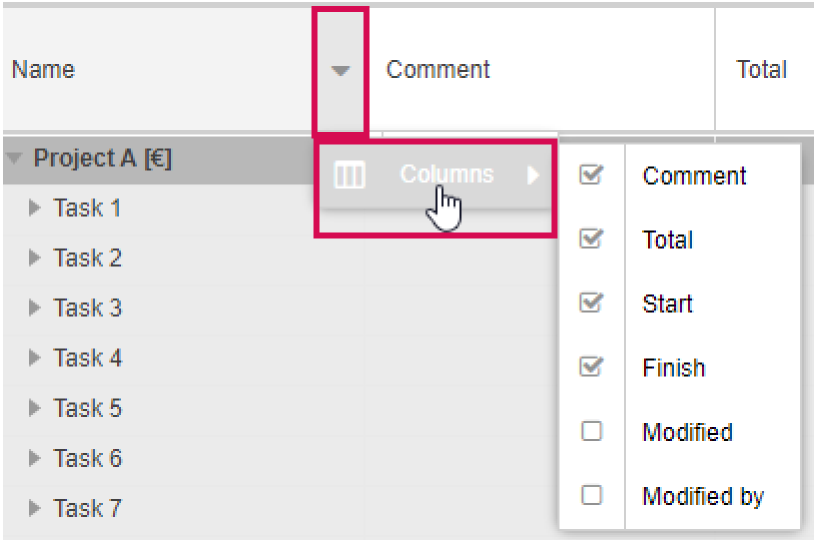
2.1.4 Column filters and rearrangement

When you open a project plan in TPG CoRePlanner for the first time, the left part of the table shows only the *Name* column.

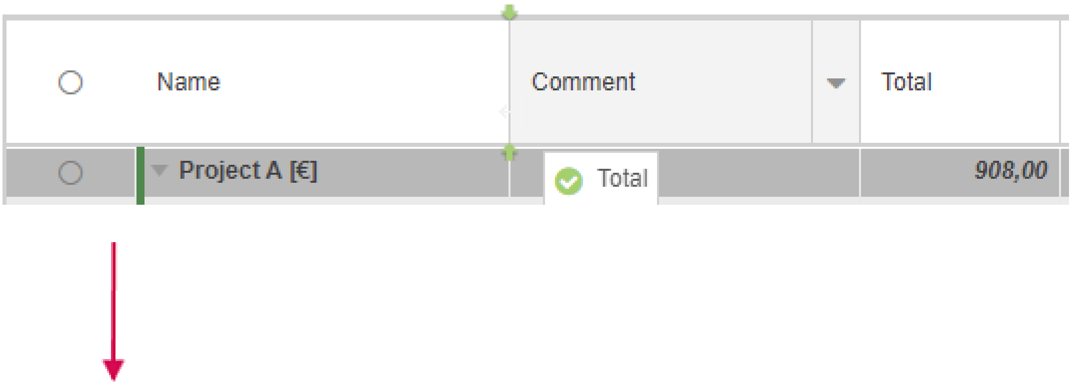
You can select further columns to be shown and change their order. The customizations will be saved automatically in the browser cache.
You can change the customizations at any time.

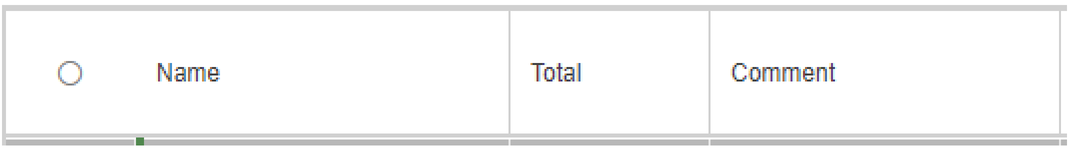
- To define which columns are hidden or shown, go to the head cell of any column and click the arrow that appears.

- Go to *Columns* and select or deselect the respective checkboxes.



- To change the column order, go to a column header and drag it to the desired place by holding down the mouse button.

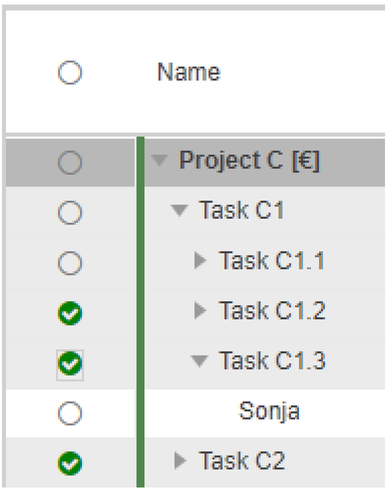




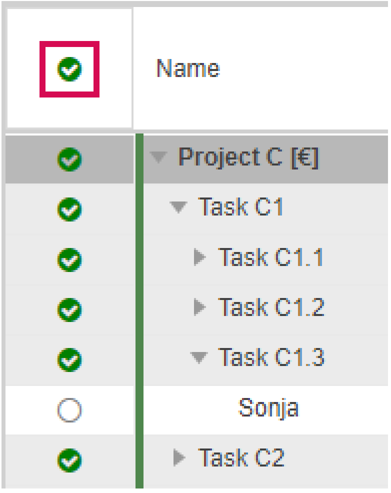
2.1.5 Selection of items for editing

In the *Task* view, the project summary task and other tasks can be selected for editing or changing the view. Resources cannot be selected in this view.

- To select or deselect a task, use the checkboxes in the first column.
  If you select a summary task and move or delete it, the sub-tasks will be moved or deleted as well.

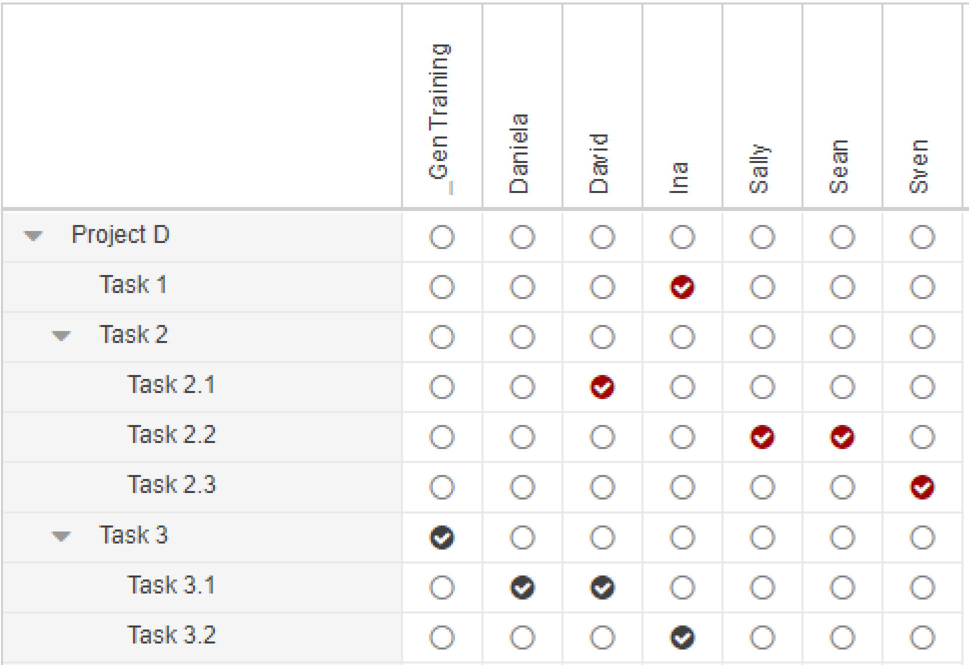


- To select or deselect all tasks at once, use the checkbox in the column header.



2.2 Matrix

The *Matrix* view shows the assignment of the resources to the project tasks. Here, you can assign resources to individual tasks before entering the effort values in the *Task* view.



Red background: assignment with time-phased data in the project plan

Black background: assignment without time-phased data in the project plan

Assignments can be established by selecting the appropriate checkbox(es). Removing the checkmarks deletes the assignments.

➤ When you delete an assignment marked in red, the time-phased values of the respective resource in the project plan will also be deleted. Therefore, a confirmation / warning prompt is displayed: *You are removing an assignment with time-phased data or custom field values! Would you like to continue?*
When you delete an assignment marked in black, there is no confirmation / warning prompt.

Commitment values saved in TPG TeamManager will be reloaded when you click the *Sync* button in the *Projects* group of the menu bar.

2.2.1 Matrix filters

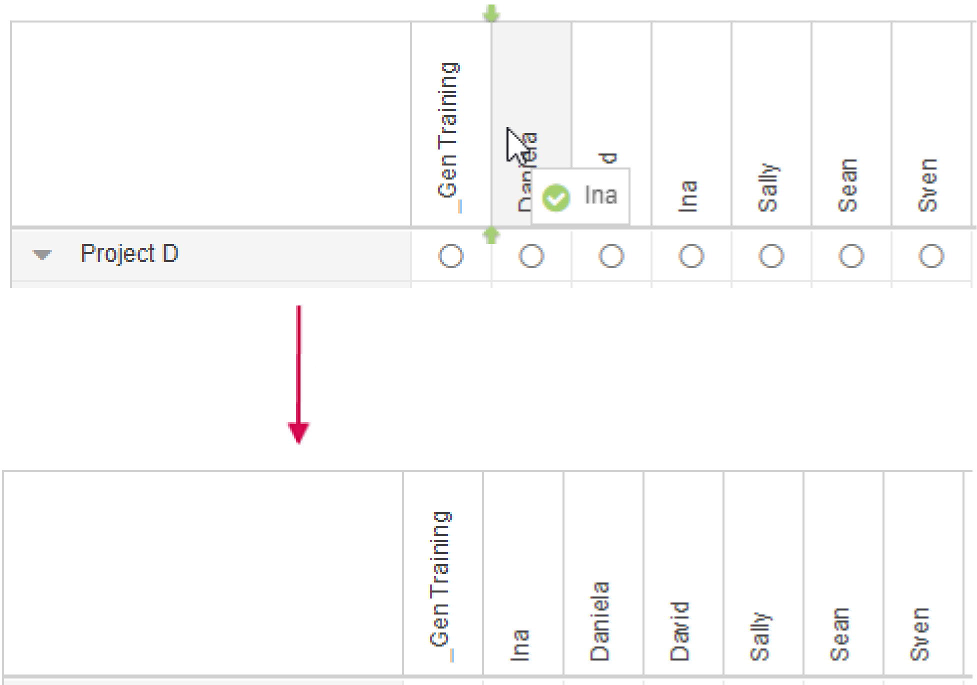
By default, the matrix shows all tasks of the project and 30 project team members per page.

- To filter for specific projects or resources, enter their name in the respective filter field (1). The filter will be applied while entering the name.
- To show more or less resources, change the value in the *Columns per Page* field (2).

2.2.2 Column rearrangement

The order of columns can be changed by drag and drop.

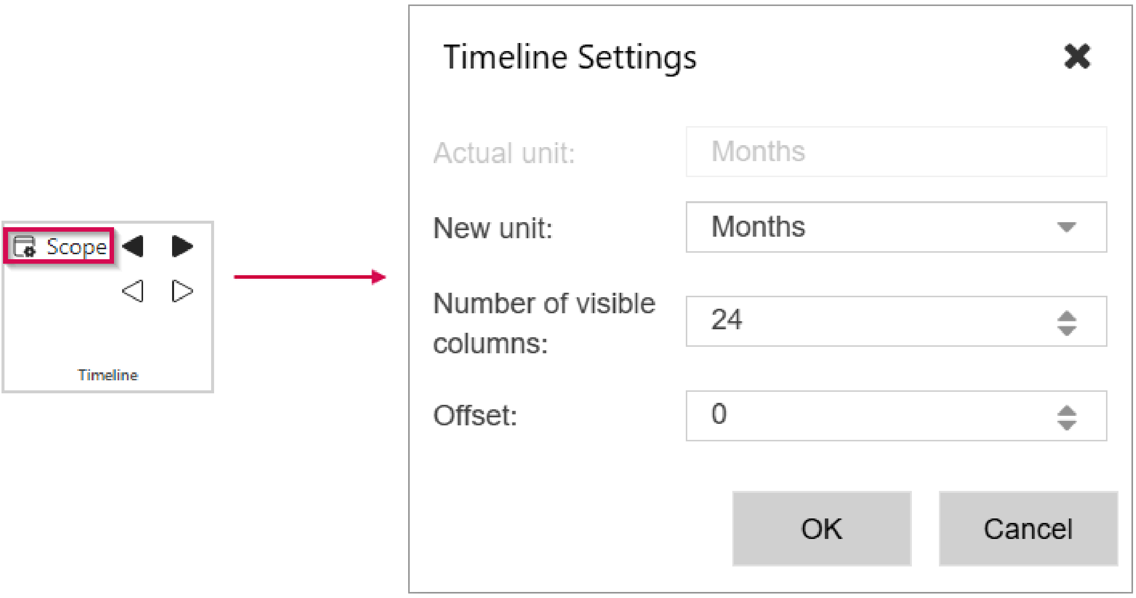
- Go to a column header and drag it to the desired place by holding down the mouse button.



2.3 Timeline

In this Chapter you find all settings around the topic Timeline.

- In the *Timeline* group of the menu bar, click *Scope*.
  That opens the timeline settings.



At New unit 16 you can set the desired unit. Available is *Days*, *Weeks*, *Months*, *Quarters*, *Years.* Values are always stored in hrs/day so that the system always calculates the correct value for each unit.

If you have set the unit other than days, the entered number of hours will spread through the number of working days within that unit.

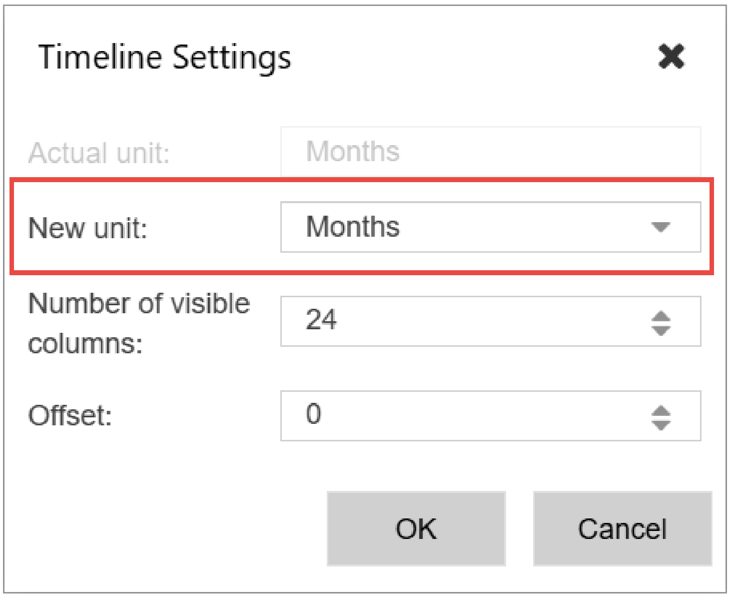
At Number of visible columns 17 you set the number of visible columns which is important if you want to show days the more columns you set the longer the system needs to render the view.

Offset 18 sets the Number of Units Offset from the current date.

2.3.1 Timeline units

By default, the timeline shows years on the main scale and months as planning units on the lower scale, starting with the current month. You can change the planning units to days, weeks, quarters or years.

- In the *Timeline* group of the menu bar, click *Scope*.
- Select the desired planning unit from the drop-down menu and click *OK*.
  The unit of the main scale changes automatically according to the unit of the lower scale. For example, if you set the lower scale unit to *Weeks*, the main scale will automatically change to months including the year.



If the new unit is larger than the current one, the values of time-phased data will be summarized accordingly.
If the new unit is smaller than the current one, the values will be distributed linearly.

If the new unit is larger than the current one, the values of time-phased data will be summarized accordingly. If the new unit is smaller than the current one, the values will be distributed linearly.

The following table shows an example for the entries in the *Absences* row of a resource (October 2022 - March 2023):

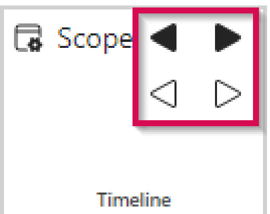
	Planning unit: Months	Planning unit: Quarters
Entries	Nov: 8h, Dec: 40h, Jan: 24h	Q4: 48h, Q1: 24h
Switch unit to	Quarters	Months
Outcome	Q4: 48h, Q1: 24h	Oct: 15.75, Nov: 16.5, Dec: 15.75 Jan: 8.12, Feb: 7.38, Mar: 8.49

➤ When switching from months to weeks or from weeks to months, the accuracy of your inputs can get skewed. The reason is that weeks often go beyond months. To avoid skewed recalculation results, it is recommended that you choose and stick to a planning unit.

2.3.2 Timeline range

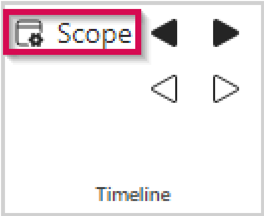
By default, the timeline shows years on the main scale and 24 months as planning units on the lower scale, starting with the current month. You can shift the timeline or change the number of visible planning units with the buttons in the *Timeline* group of the menu bar.

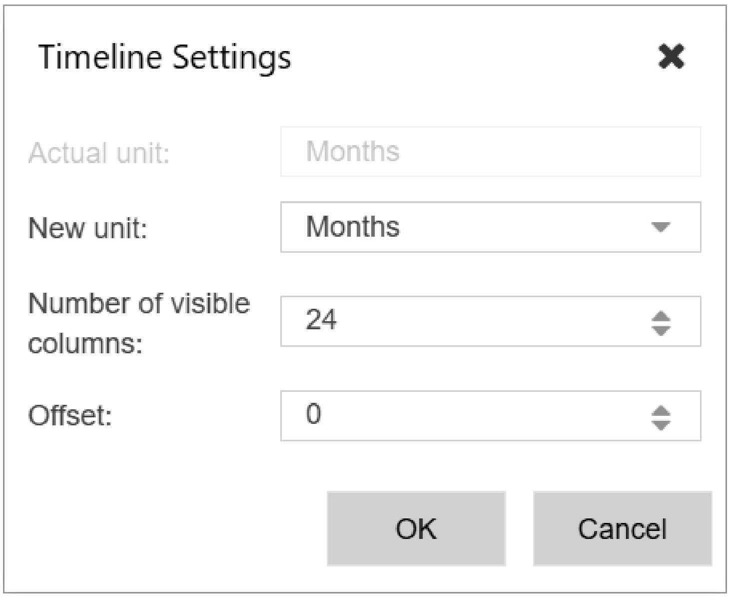
- To shift the timeline start back or forward by one unit on the main scale, click the double arrows.
- To shift the timeline start back or forward by one planning unit, click the single arrows.



- To change the number of planning units to be shown, click *Scope.*

- Enter the desired number of visible columns and click *OK*.





➤ For changing the units themselves, see Timeline units 16.

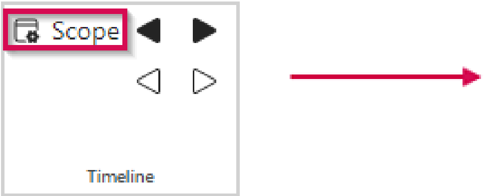
2.3.3 Timeline Start

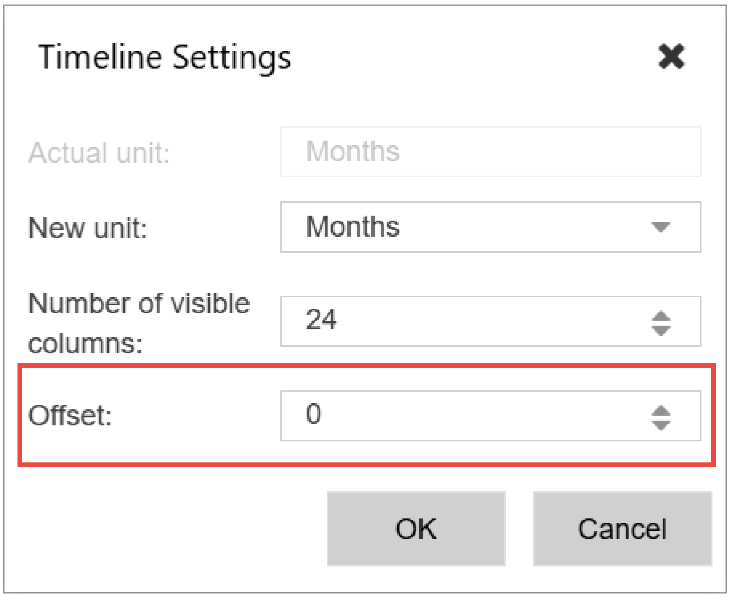
By default, the timeline starts with current unit. For example the timeline Unit is set to Month, and the current month is August then the timeline starts with August.

However, sometimes you want to see the some units before the current one, then you can set a negative Offset to see the number of Units before the current one.

Or you want to start he timeline a few units into the future then you can set a positive Offset, to start the timeline a few units into the future.

- In the *Timeline* group of the menu bar, click *Scope*.
- Select the desired planning offset from the drop-down menu *Offset* and click *OK*.





3 Planning Procedure

This section gives an overview of a planning procedure, using examples.

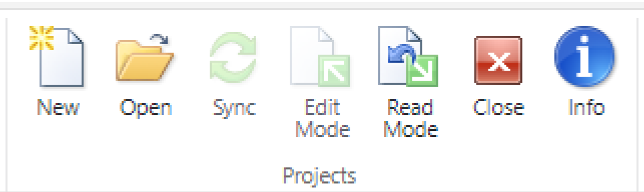
It explains how to

- create, open and edit or delete projects 20 in general
- create and structure tasks 28
- assemble resources 32 for a project
- assign 35 resources to tasks and enter work values
- update 38 the project depending on resource availabilty

➤ Input data are saved automatically.

3.1 Projects

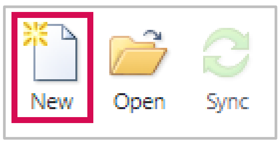
In the *Projects* group of the menu bar, you will find the buttons for actions that affect an entire project: create, open, check in, check out etc.



3.1.1 Creating a project

New projects can be created from the homepage or in the *Task* view.

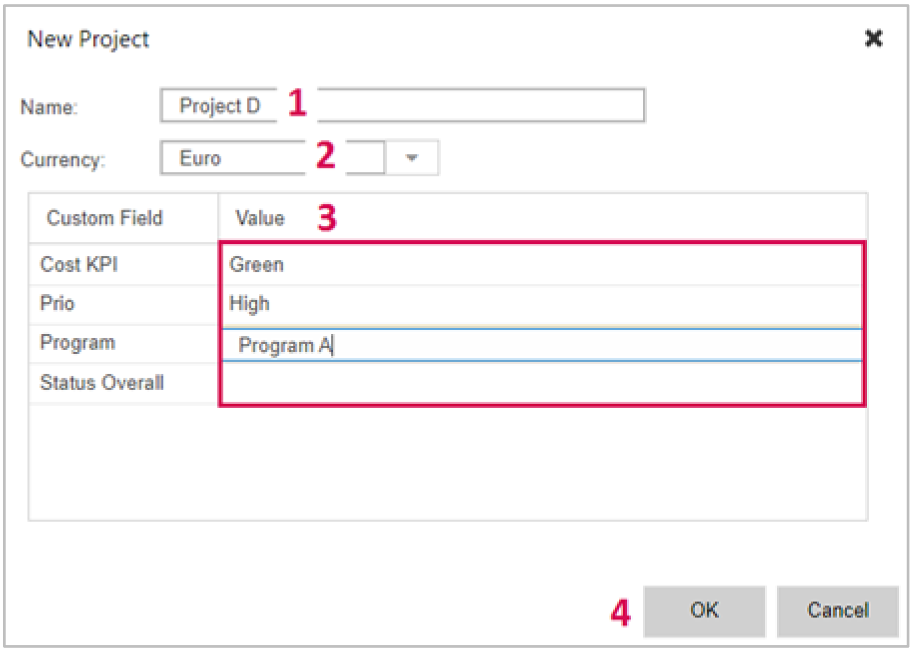
- Click *New* on the menu bar.



- Enter a name for the project (1) and select the currency to be used for cost calculation (2).

➤ The name you enter here will also be the name of the project summary task. Once saved, the name of the project summary task will remain unchanged even if you rename the project.

- Enter values for the custom fields (3).
  Mandatory fields are marked with an asterisk.
- Click *OK* (4).

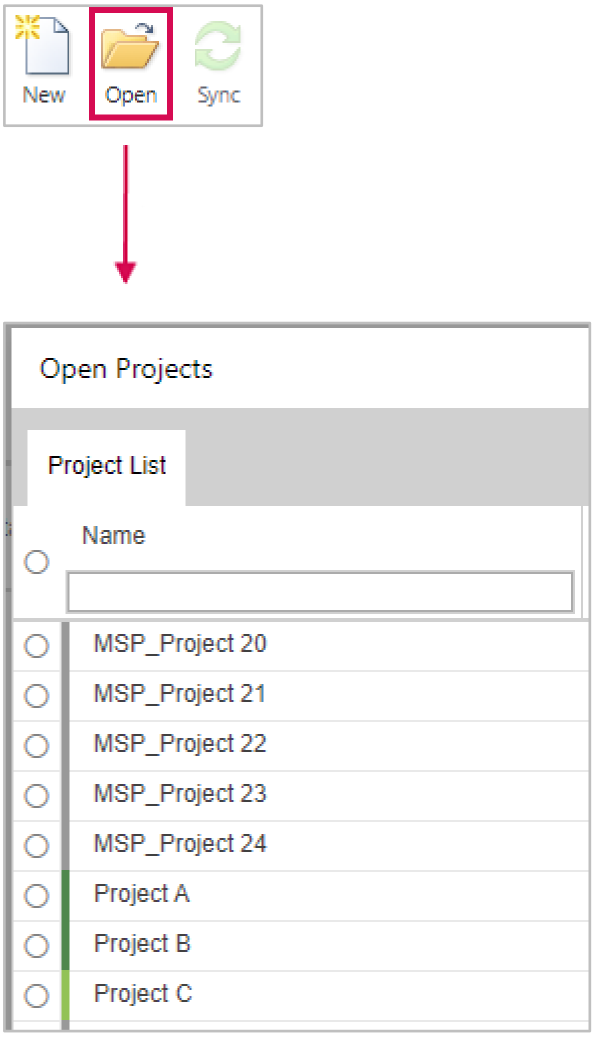


This will create a project with the corresponding project summary task. The next step is to fill the project with tasks 28.

3.1.2 Checking in and out

Projects can be opened from the homepage or in the *Task* view.
To get an overview of multiple projects, you can open more than one project at a time. The projects will be displayed one below the other in the project plan. Alternatively, you can start CoRePlanner in a seperate browser tab for each project.

- To open the list of projects, click *Open* on the menu bar.



- To filter the list for a specific project, enter the project name in the *Name* field above the list.
- To open a project, double-click its name.

Or

- Select the checkbox of one or more projects and click *Open* at the bottom right.

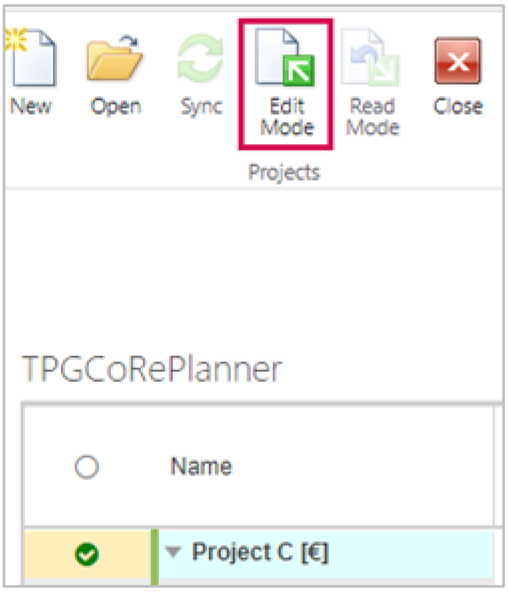
In TPG CoRePlanner, a project can be edited only by one user at a time. In general, only the person who has created a project has edit permissions. However, permissions can be given to additional users in the database.

To edit a project, it must be checked out by you.

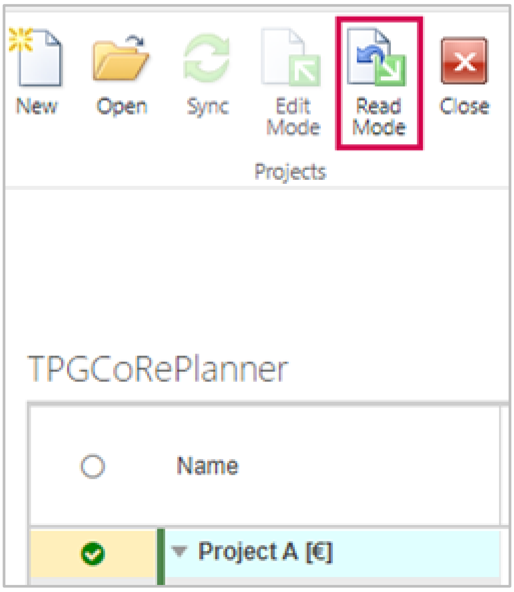
A colored line at the left edge indicates if a project is checked in or out:

Gray: Either someone else has set the project to the edit mode, i.e. it is checked out. Or you do not have permissions for the project. In both cases, you can open and read the project but cannot edit it.

Light green: The project is in the read mode, i.e. it is checked in. After opening the project, you can check it out:
Select the project summary task and click *Edit Mode* in the *Projects* group of the menu bar.

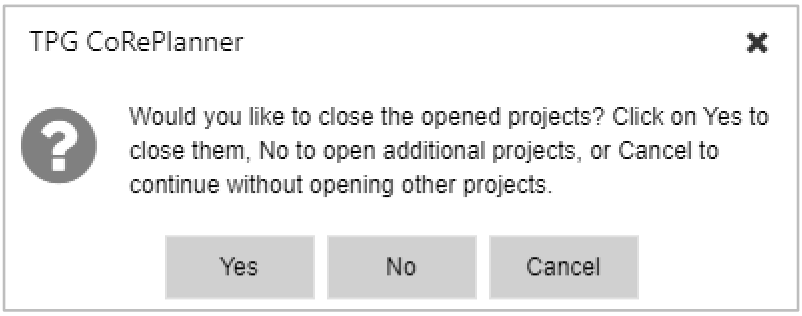


Dark green: The project has been checked out by you. After opening the project, you can edit it directly.
To enable other users to edit the project, check it in: Select the project summary task and click *Read Mode* in the *Projects* group of the menu bar.



By default, the last saved mode will be kept when you close the project. Depending on the settings in CoReAdmin, projects may be automatically checked in when they are closed.

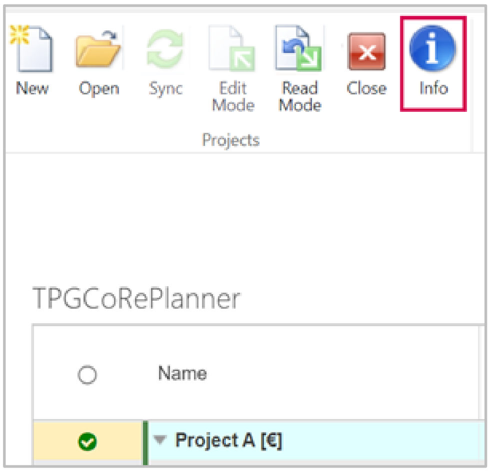
If you have opened a project and open another one, you will be asked whether the current project should be closed. If you click *No*, the additional project will be shown below the current one.



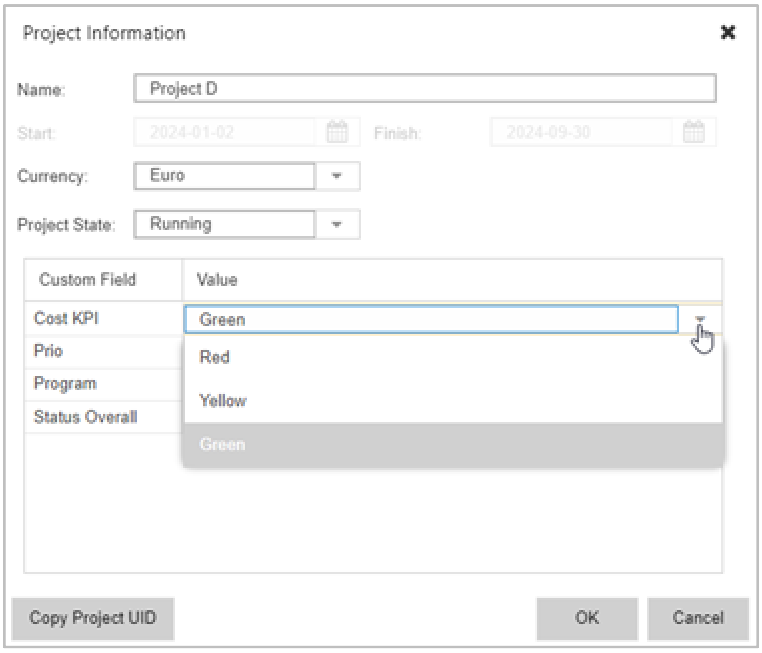
- To close a project without opening another one, select the project summary task and click *Close* on the menu bar.

3.1.3 Viewing and editing project information

- To see general information about a project, select the project summary task and click *Info* on the menu bar.



In the dialog that opens, you can change the project name, the project state and other values depending on the settings in CoReAdmin. To make these changes, the project must be checked out 22 by you.



➤ By default, the *Start* and *Finish* fields are read-only. They will be filled out automatically when time-phased data are entered for the resources in the project plan. TPG CoRePlanner does not calculate the duration of projects.

3.1.4 Deleting projects

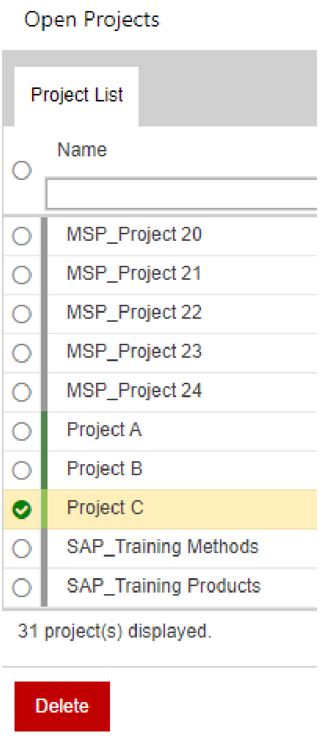
⚠ There is no archiving or backup functionality in TPG CoRePlanner. Once deleted, projects cannot be restored.

Projects can only be deleted when they are in read mode. In the project list, these projects are marked with a light green line before the name.

- Click *Open* to show the project list.


New
Open
Sync

- Select the project you want to delete and click *Delete* at the bottom left.



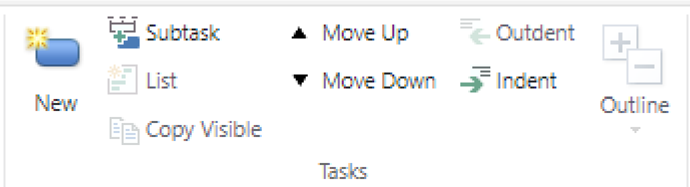
When projects marked in dark green or gray are selected, the *Delete* button is disabled.

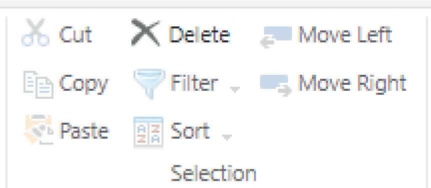
Projects marked in dark green can be opened, set to read mode, closed and then deleted.

Projects marked in gray cannot be deleted.

3.2 Tasks

You schedule the project tasks in the table of the *Task* view. The main buttons for creating and editing tasks are in the *Tasks* and *Selection* groups of the menu bar.



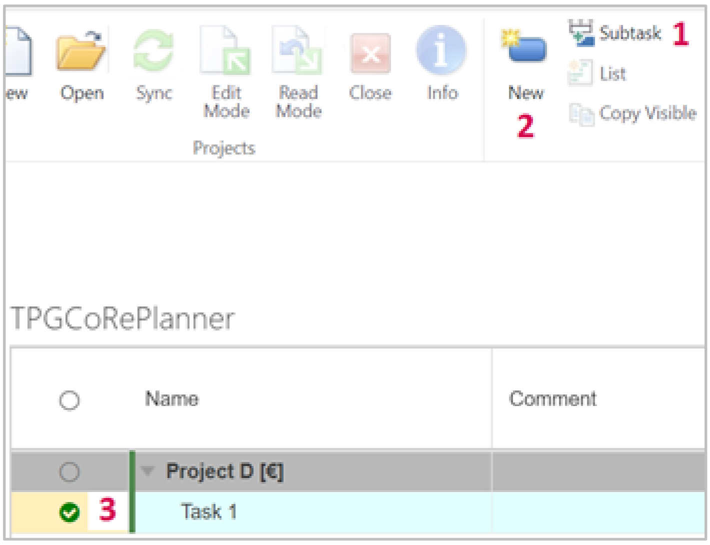


As planning with TPG CoRePlanner is not based on the duration of tasks but on the available resources, there are no milestones.

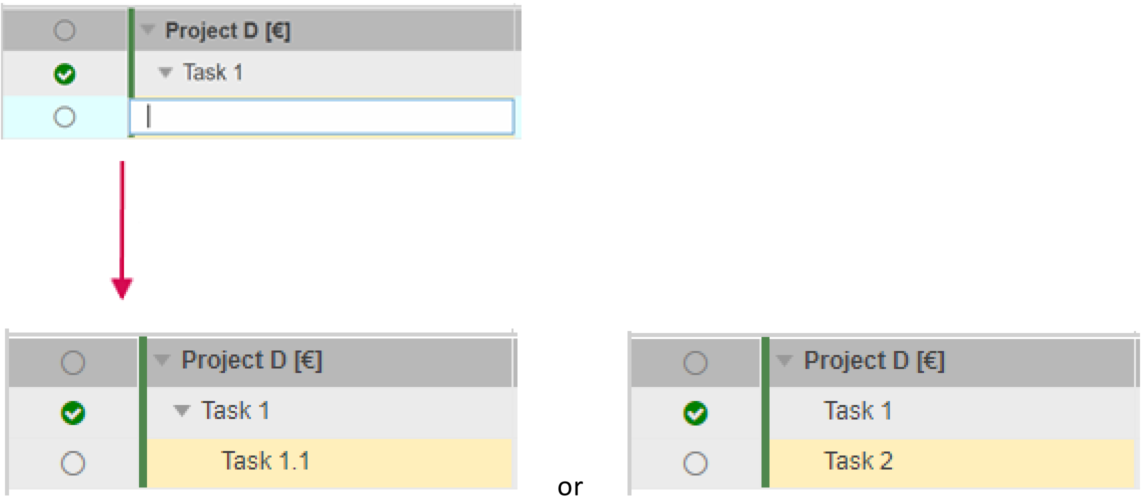
3.2.1 Creating and deleting tasks

All tasks of a project are at least one level below the project summary task. Therefore, the first task you create in a new project will be a sub-task of the project summary tasks.

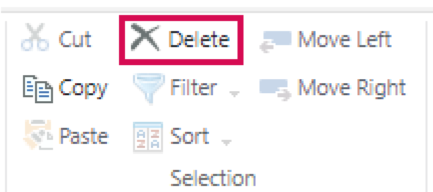
- Select the task below which you want to create a new task (3). In a new project, select the project summary task.
- To create a sub-task, click *Subtask* in the *Tasks* group of the menu bar (1).
- To create a task on the same level, click *New* in the *Tasks* group of the menu bar (2).



- Enter a name for the task and press the Enter key.



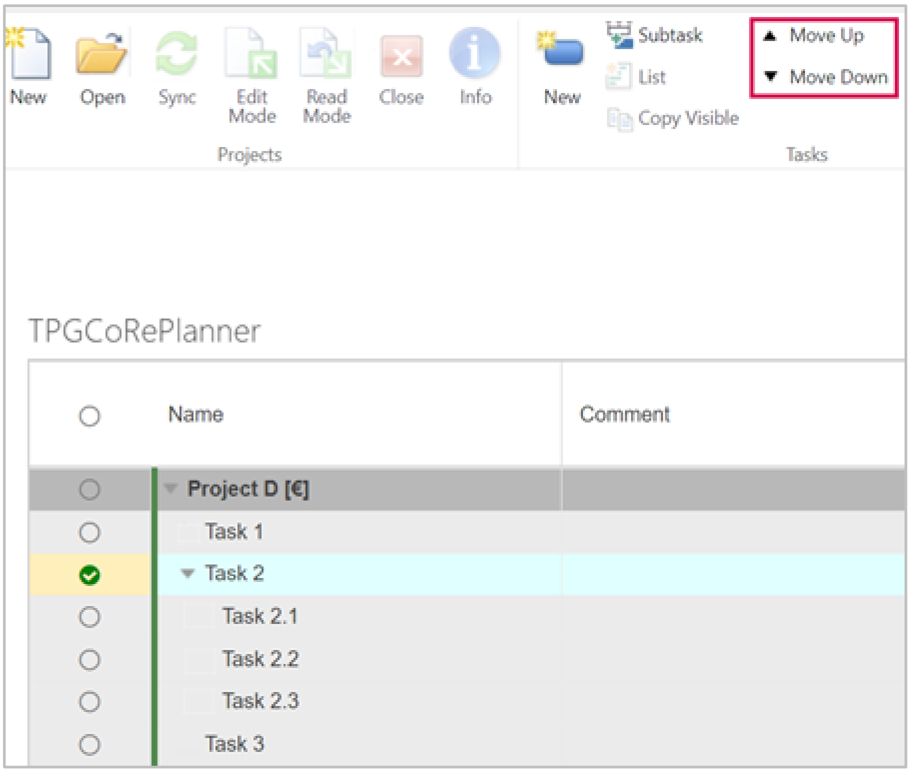
- To delete a task, select it and click *Delete* in the *Selection* group of the menu bar.



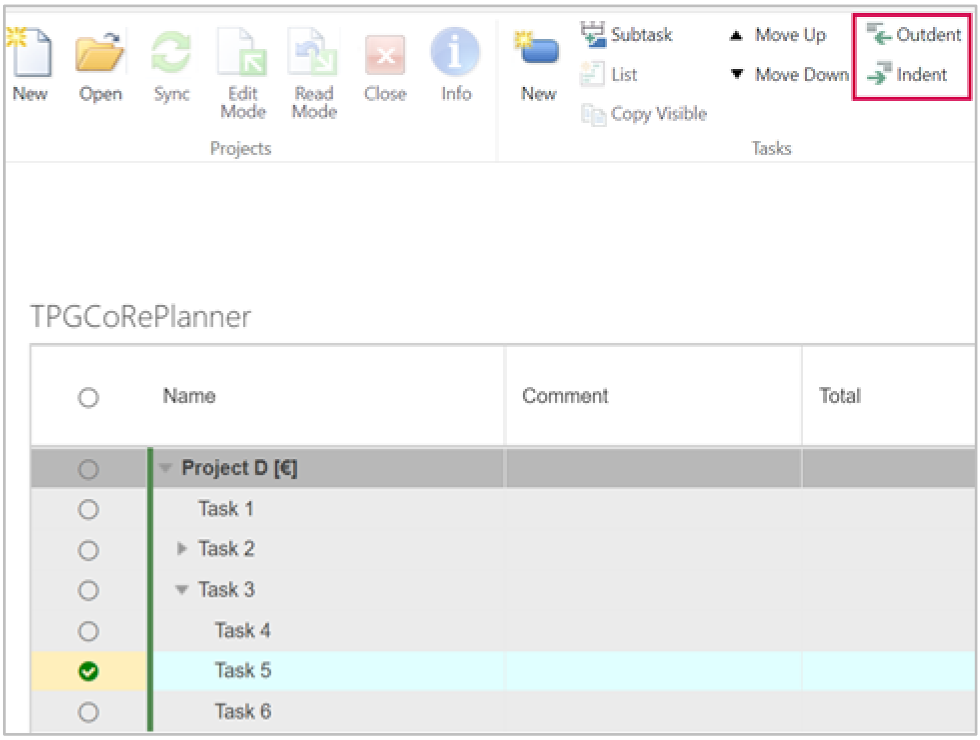
3.2.2 Changing the task structure

After the tasks have been created, you may want to change their order or hierarchical level.

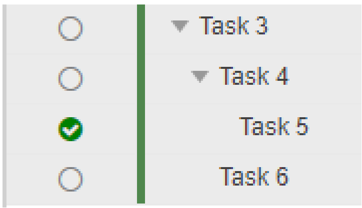
- To change the order, select a task and click *Move up* or *Move down* in the *Tasks* group of the menu bar.
  A summary task will be moved including its sub-tasks.



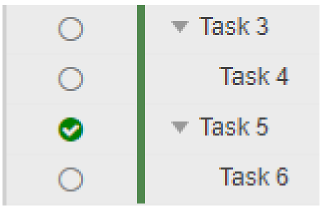
- To change the hierarchical level, select a task and click *Indent* or *Outdent* in the *Tasks* group of the menu bar.
  A summary task will be downgraded or promoted including its sub-tasks.



In this example, indenting Task 5 will convert it to a sub-task of Task 4:



Outdenting Task 5 will promote it to the same level as Task 3 and convert Task 6 to a sub-task of Task 5:



When the task structure is complete, the next step is to assemble the resources 32.

3.3 Resources

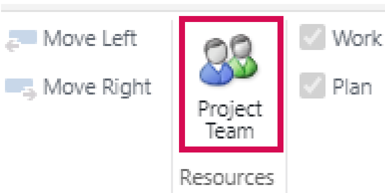
You assemble the resources for your project from a resource pool that is managed in TPG CoReAdmin or in some other resource management tool connected by an API such as TPG PSLink.

The resource pool differentiates between work resources and cost resources.
Work resources are individuals or generic resources to whom you will assign work hours.
Cost resources are equipment or locations.

➤ The current version of TPG CoRePlanner does not yet support cost values. Cost resources can be added to the project team and assigned to tasks, but they will not be shown in the project plan.

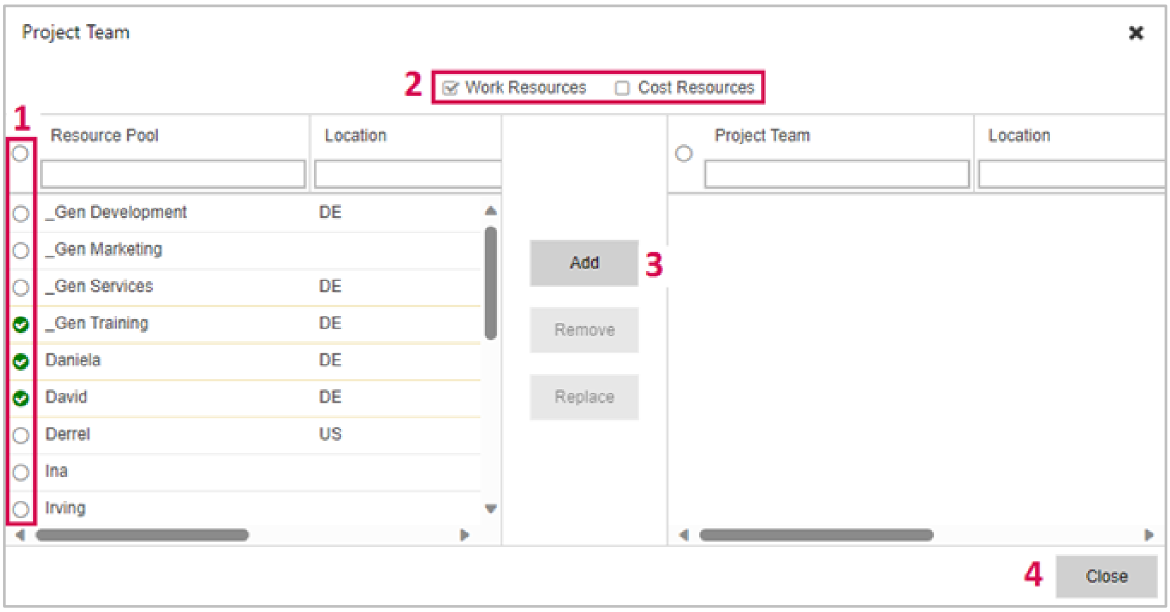
3.3.1 Assembling a project team

- To assemble the resources for your project, select the project summary task and click *Project Team* in the *Resources* group of the menu bar.



The left part of the *Project Team* window shows the resources of the resource pool.

- Use the checkboxes in the upper part to define the resource types to be shown (2).
- Select the resources you want to add to the project team (1).
  To filter for specific resources, enter their name or properties in the respective search field above the list.
- Click *Add* (3).
  The selected resources will be moved to the right part of the window.
- Click *Close* (4).



In the same way, you can later add further resources to the project team.

The next step is to assign resources 35 to the tasks.

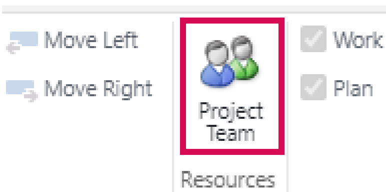
3.3.2 Removing or replacing resources

Members of the project team can be removed or replaced.

If you remove a resource that has tasks assigned, their assignments and values will be deleted.

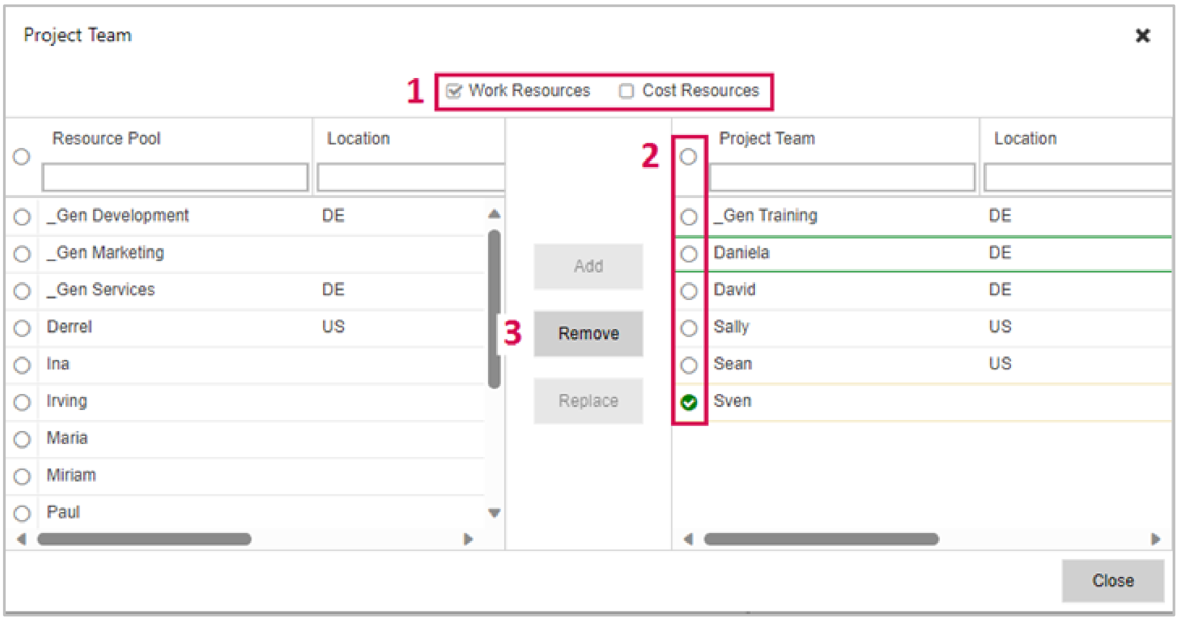
If you replace a resource that has tasks assigned, their assignments and values will be transferred to the new resource.

- To remove or replace a resource of your project, select the project summary task and click *Project Team* in the *Resources* group of the menu bar.

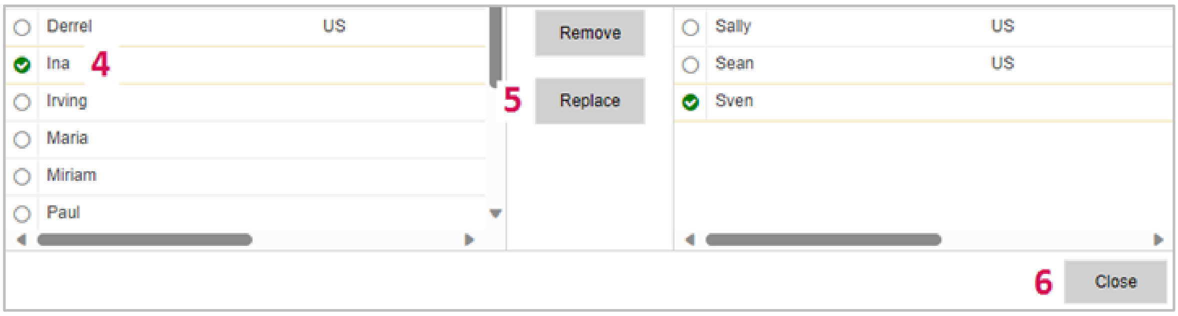


The members of the project team are shown in the right part of the window. Resources with assignments are marked by a green border.

- Use the checkboxes in the upper part to define the resource types to be shown (1).
- In the right part of the window, select the resource you want to remove or replace (2).
  To filter for specific resources, enter their name or properties in the respective search field above the list.
  If you want to remove resources without replacing them, you can select multiple resources.
- To remove the selected resource(s) without replacing them, click *Remove* (3).
  If you are about to remove a resource with assignments, you will be asked if you want to continue. Click *Yes*.
  The selected resource(s) will be moved back to the resource pool and are no longer part of the project team.



- To replace the selected resource, select a new one from the resource pool on the left (4) and click *Replace* (5).
  If you are about to replace a resource with assignments, you will be asked if you want to continue. Click *Yes*.
  The resource selected on the right will be replaced by the new one and is no longer part of the project team.
- Click *Close* (6).

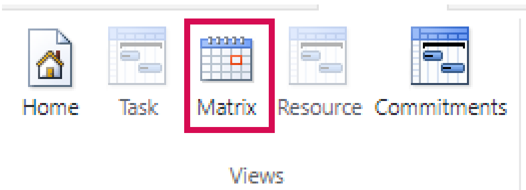


3.4 Assignments

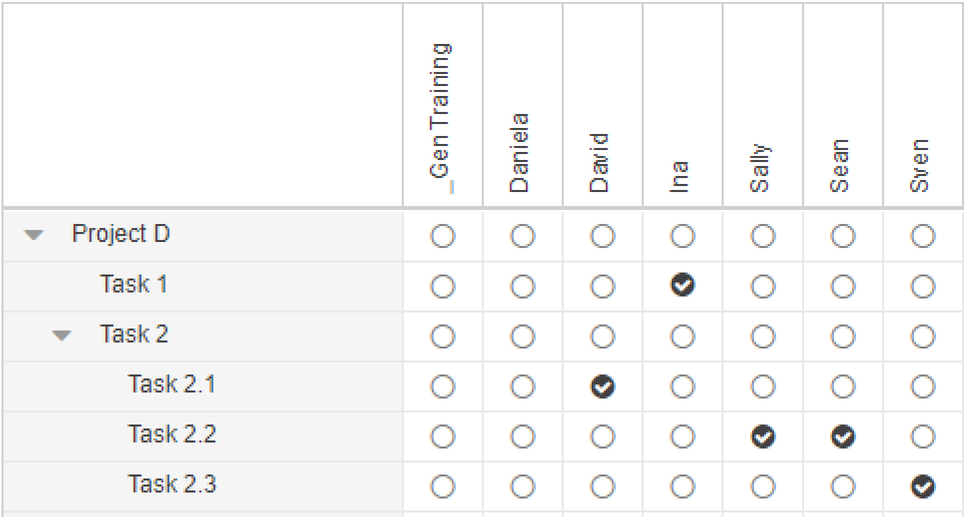
When tasks and a project team have been created, the *Matrix* view will show the tasks and resources in a crosstab. Here, you assign the resources to tasks. After that, you enter the estimated effort per time phase in the *Task* view.

3.4.1 Assigning resources to tasks

- To switch to the *Matrix* view, select the project summary task and click *Matrix* in the *Views* group of the menu bar.



- Assign resources to the tasks by activating the appropriate checkbox.
  By default, you can assign resources also to summary tasks and the project summary task.
  The background of the checkmark will turn red when time-phased data are entered for the assignment.



- To delete an assignment, deactivate the checkbox.

The next step is to assign work values 36 in time phases.

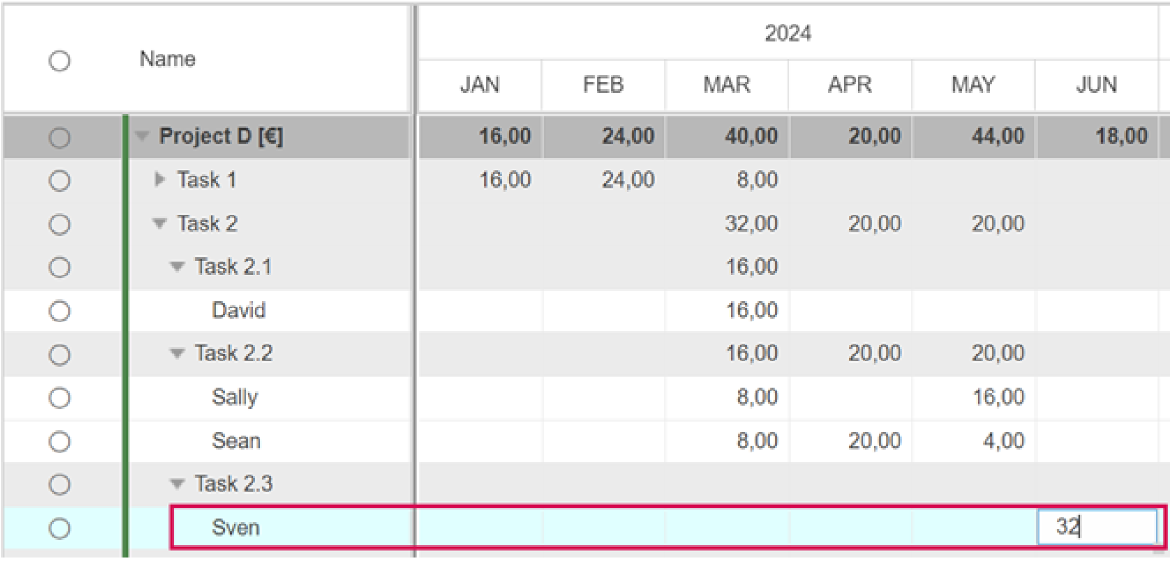
3.4.2 Entering time-phased data

When resources have been assigned to the project tasks, you plan the effort per time phase in hours. This can be done in the *Task* view. By default, planning units are set to months. You can change the units to weeks, quarters or years (see Timeline units 16).

All time-phased data are entered in the white lines, i.e. in the resource lines.
Rows with a gray background are read-only. They contain automatically transferred or calculated values.

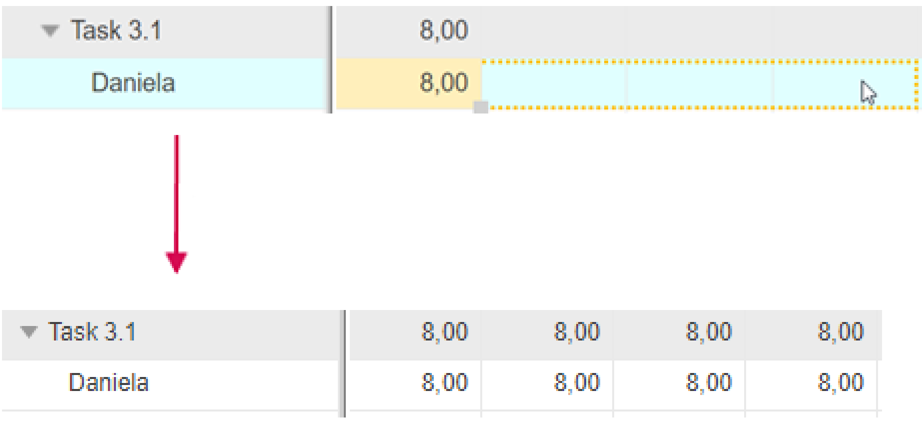
➤ You can enter time-phased data after a single or double click in a cell.

- For each task and resource, insert the estimated number of hours in the respective cells of the timeline.



For periodic activities, you can enter the same value for many subsequent time phases by drag and drop:

- Enter the value in the first cell of the period and drag the bottom right corner of the cell to the right.



When the effort is estimated, the next step is to check if the project can be executed as planned or if changes 38 are necessary due to resource availability.

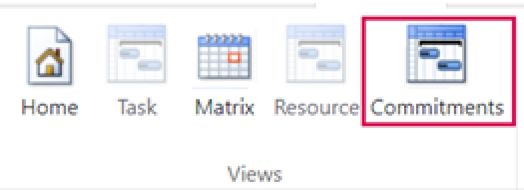
3.5 Commitments and Updates

As the project team members also have line operations, other project work, vacations etc., their team managers need to check if the resources are available for the requested amount of hours. If there are resource conflicts, the project plan needs to be changed. Synchronization is done in the *Commitments* view.

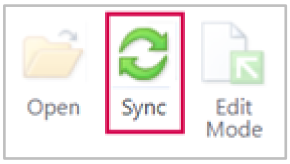
3.5.1 Getting resource commitments

In the *Commitments* view, the upper table shows the work data of your project in the *Requests* rows. The team managers get these requests when they import project data into TPG TeamManager. Depending on resource availability, the team managers will commit the requested resources or commit a personal resource for project work that was planned with a generic resource. If a requested resource is not available, the team manager can commit some other resource or make a suggestion, e.g., postponing the task or splitting it between two resources.

- To switch to the *Commitments* view, select the project summary task and click *Commitments* in the *Views* group of the menu bar.
  In the beginning, all commitment status cells are read because no commitments have been made yet.



- Click *Sync* in the *Projects* group of the menu bar.
  This will synchronize the commitments made by the team managers into the upper table of the *Commitments* view.



The example below shows the commitments made for Project D:

– The team manager of Daniela and David (2, 3) has not yet made any commitments.

– The project work for Ina, Sally and Sven (4, 6) has been committed as requested.

– The project work for Sean (5) has been committed, but 4 hours need to be moved from April to May. April is yellow because the commitment is 4 hours (> 10%) less than requested for this month. May is dark blue because the commitment is 4 hours (> 20%) more than requested for this month.

– Tom (7) is new in the project. He has no request values, but the committed hours are equal to the values requested for the generic _Gen Training (1). The team manager of team Training has assigned Tom to the project to replace the generic resource.

Name	2024								202
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Project D			-16,00	-4,00	4,00	-8,00	-8,00	-16,00	
Requests	16,00	24,00	40,00	24,00	40,00	50,00	28,00	48,00	40,00
Commitments	16,00	24,00	24,00	20,00	44,00	42,00	20,00	32,00	40,00
_Gen Training 1					-24,00	-10,00	-16,00	-16,00	-16,00
Requests					24,00	10,00	16,00	16,00	16,00
Commitments									
Daniela 2						-8,00	-8,00		
Requests						8,00	8,00		
Commitments									
David 3			-16,00					-8,00	-8,00
Requests			16,00					8,00	8,00
Commitments									
Ina 4									
Sally									
Sean 5				-4,00	4,00				
Requests			8,00	24,00					16,00
Commitments			8,00	20,00	4,00				16,00
Sven 6									
Tom 7					24,00	10,00	16,00	16,00	16,00
Requests									
Commitments					24,00	10,00	16,00	16,00	16,00

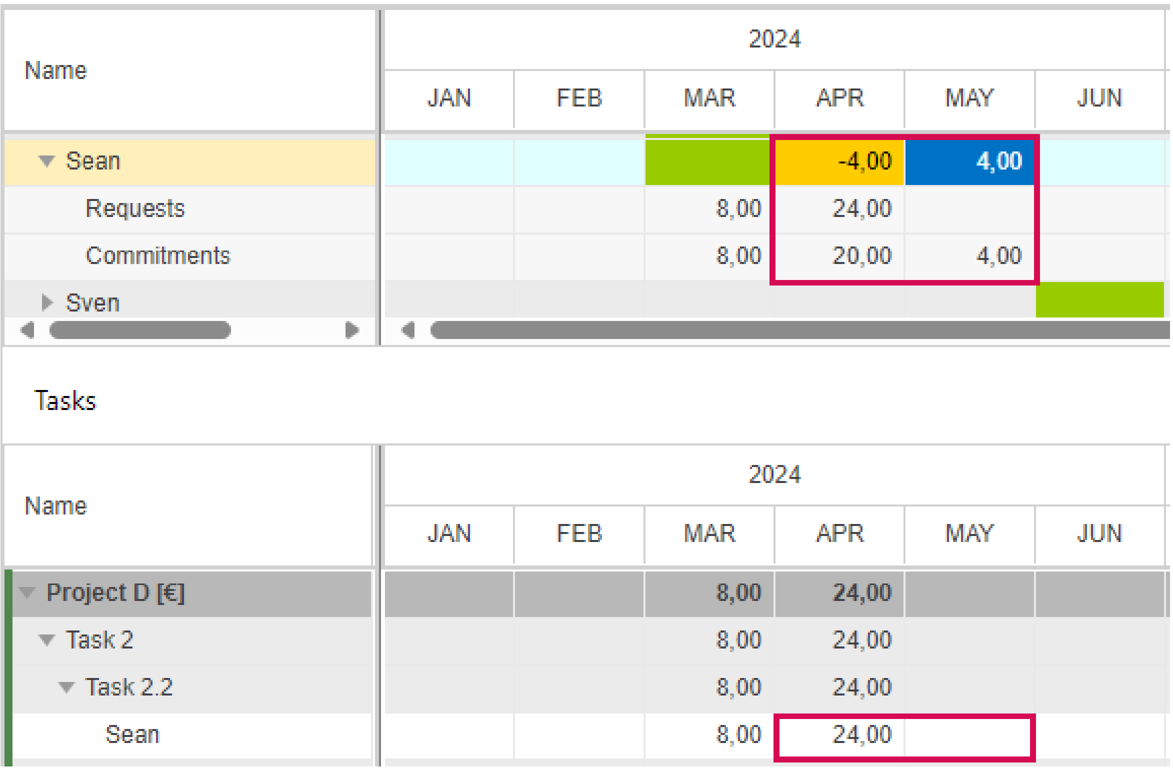
The next step is to adapt the project plan by shifting work 40 and replacing the generic resource 41.

3.5.2 Shifting time-phased data

When resources are not committed as requested, the project plan needs to be changed. In most cases, you will shift project work on the timeline.

In the example below, Sean was requested for 24 hours in April, but the team manager committed 20 hours in April and 4 hours in May.

- To shift the project work, click any entry of *Sean* in the upper table of the *Commitments* view. The *Tasks* table will show Sean's tasks.
  - Adapt the work values in the *Tasks* table.
    If the changed values equal the committed values or differ by less than 10%, the cells in the upper table will turn green.



Name	2024 JAN	FEB	MAR	APR	MAY	JUN
Sean						
Requests			8,00	20,00	4,00	
Commitments			8,00	20,00	4,00	
Sven						

Tasks

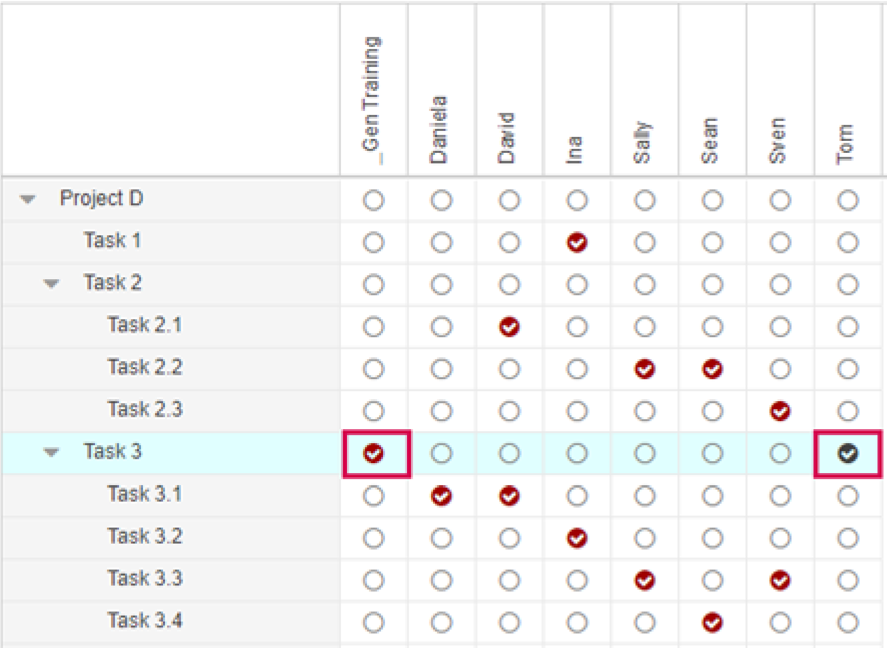
Name	2024 JAN	FEB	MAR	APR	MAY	JUN
Project D [€]			**8,00**	**20,00**	**4,00**	
Task 2			8,00	20,00	4,00	
Task 2.2			8,00	20,00	4,00	
Sean			8,00	20,00	4,00	

3.5.3 Replacing or adding resources

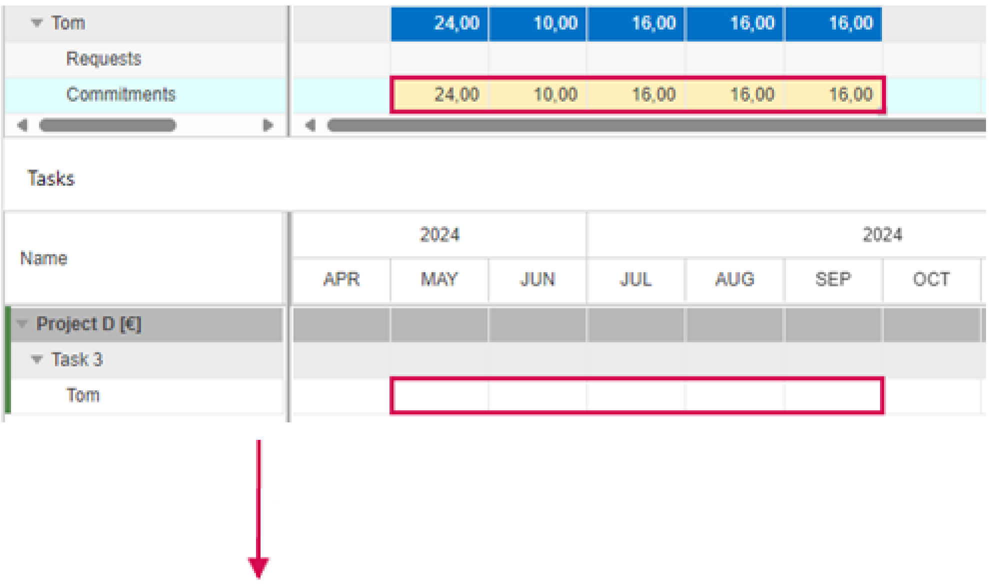
If a task was planned with a generic resource or if the requested resource is not available, the team manager may assign a new resource to the project. In this case, the new resource will automatically be listed in the *Matrix* view.

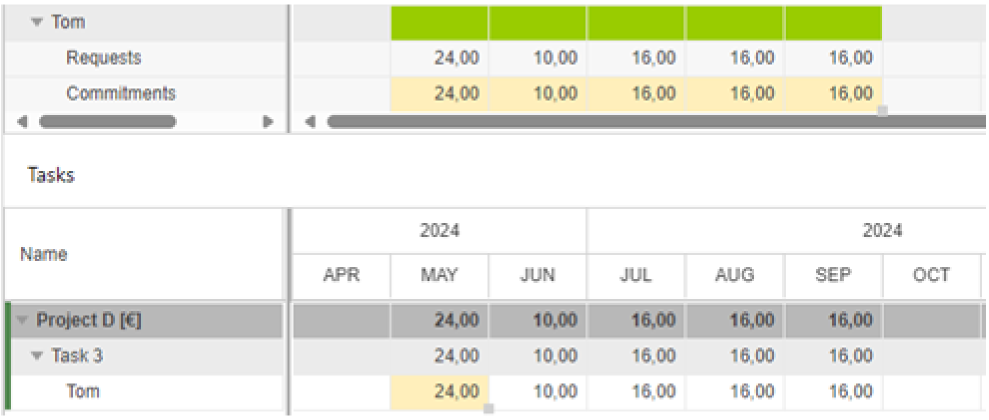
In the example below, Tom has been assigned to the project to replace the generic resource of team Training. The project plan needs to be adapted.

- Switch to the *Matrix* view.
- In the column of the new resource, activate the checkbox(es) of the task(s) where the original (generic) resource will be replaced.



- Switch to the *Commitments* view and click an entry of the new resource to show them in the *Tasks* table.
- Copy the values in the *Commitments* row of the new resource and paste them to the resource row in the *Tasks* table.





- Switch to the *Matrix* view.
  The background of the checkmark(s) in the column of the new resource has turned red.
- In the column of the original (generic) resource, deactivate the checkbox(es) of the task(s) where the resource has been replaced.