TPG TeamManager User Guide 4.3

Version: 4.3.0
Status: 6/20/2025

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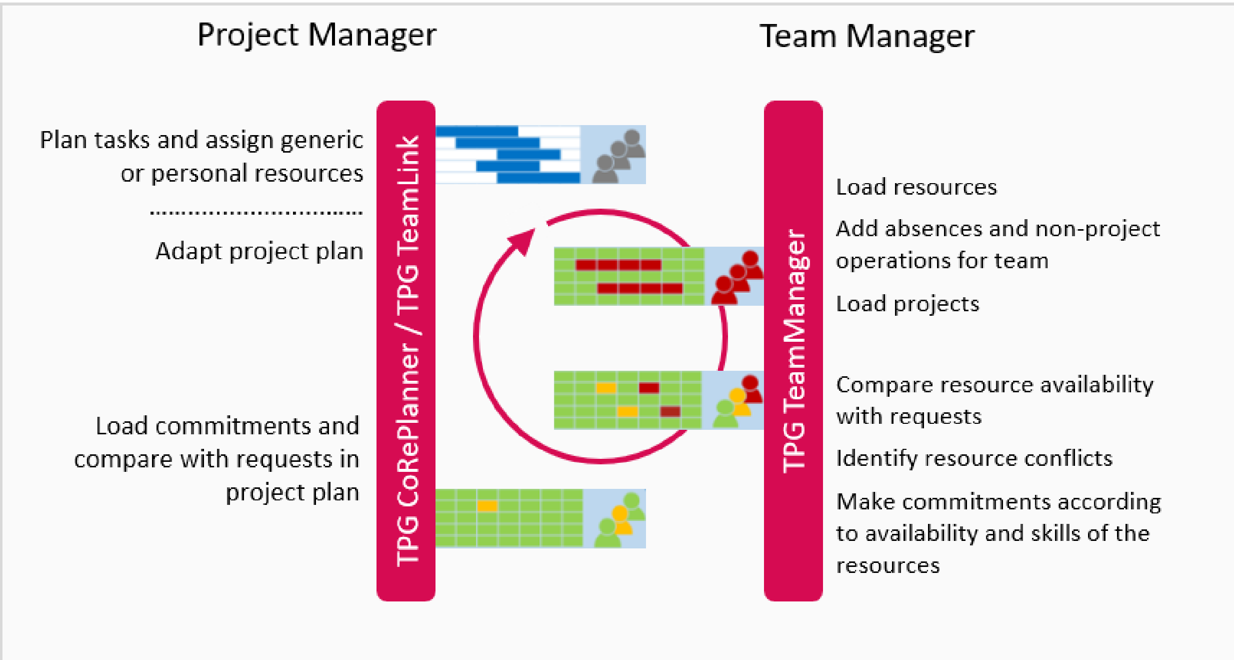
1 General Features

TPG TeamManager is a complete resource planning solution for your organization.
TPG TeamManager considers absences, line operations and project commitments so that actual available time is accurately reflected in your resource plans.

With configurable heatmaps for resource utilization, commitments and proposed projects, team managers can view and track all activities for their resources in a utilization table.
They can identify and resolve resource conflicts or prevent conflicts before committing resources to a project.

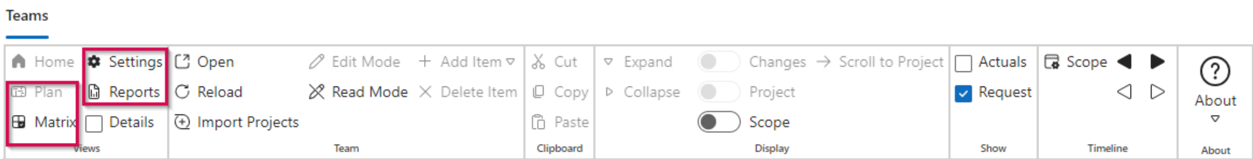
The cycle of resource planning between project managers and team managers should follow a scheduled process to sustain the reliability of the planning and therefore the satisfaction of all participants.



2 Work Interface and Views

When you open TPG TeamManager, you will first see the *Plan* view on the *Teams* tab. All functions are on the *Teams* tab.

There are four views in TPG TeamManager which can be accessed via the buttons in the *Views* group of the menu bar:



Plan 5: Main view for your work: Planning and maintenance of absences, line operations and project commitments of the team members

Matrix 32: Assignment of the team members to projects in a matrix view

Report 36: Graphical reports on resource utilization

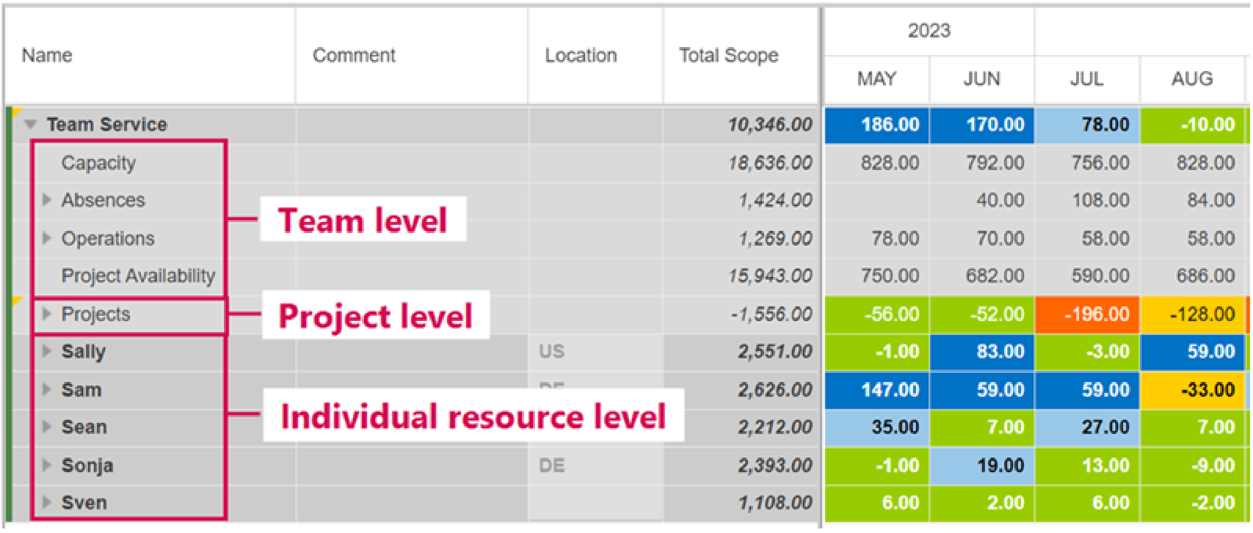
Settings 38: Adjustment of number formats

2.1 Plan

Plan is the main view for the detailed planning and maintenance of the data. There is one plan per team. When a team is opened (see Checking in and out 39), the plan opens by default.

In this view, all resources and their capacity, absences, line operations and project commitments are displayed and maintained in one table. Work hours, absences etc. are assigned to the resources in the right part, under the timeline. When a team plan is opened in TPG TeamManager for the first time, the left part of the table will show only the *Name* column. Further columns can be selected to display additional information (see Column filters and rearrangement 27).

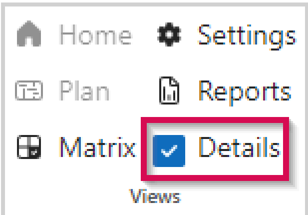
The table comprises three levels: the team level 7, the project level 10 and the individual resource level 12.
The project level is visible only after the projects have been imported (see Importing projects 54).



Name	Comment	Location	Total Scope	2023 MAY	JUN	JUL	AUG
Team Service			10,346.00	186.00	170.00	78.00	-10.00
Capacity			18,636.00	828.00	792.00	756.00	828.00
Absences			1,424.00		40.00	108.00	84.00
Operations			1,269.00	78.00	70.00	58.00	58.00
Project Availability			15,943.00	750.00	682.00	590.00	686.00
Projects			-1,556.00	-56.00	-52.00	-196.00	-128.00
Sally		US	2,551.00	-1.00	83.00	-3.00	59.00
Sam		DE	2,626.00	147.00	59.00	59.00	-33.00
Sean			2,212.00	35.00	7.00	27.00	7.00
Sonja		DE	2,393.00	-1.00	19.00	13.00	-9.00
Sven			1,108.00	6.00	2.00	6.00	-2.00

➤ If the team is a parent team whose sub-teams are displayed, the sub-teams are listed below the individual resources (see Opening a parent team with sub-teams 41).

The details table mentioned below is visible when an item is selected and the *Details* checkbox on the menu bar is selected.

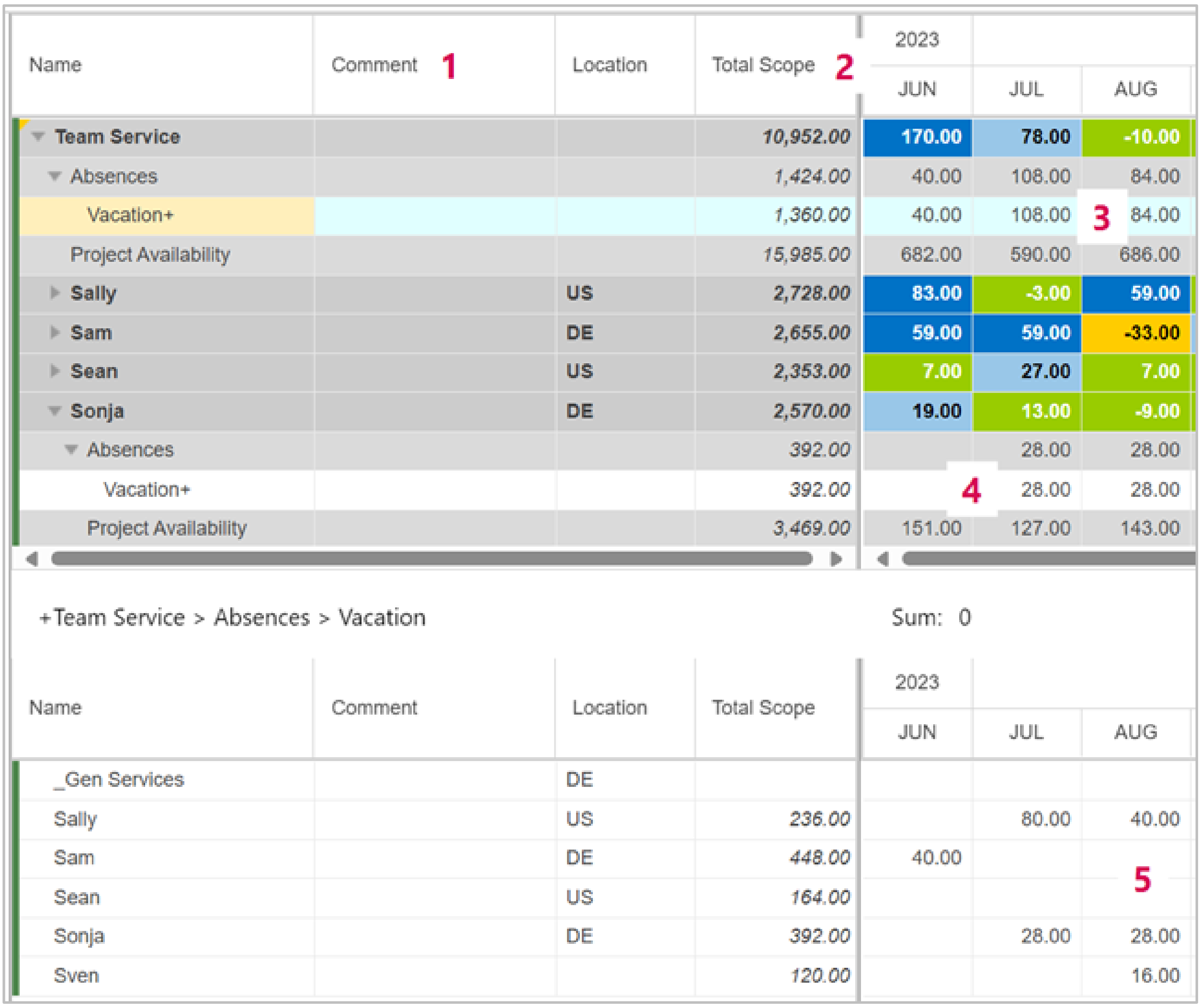


All time-phased data are entered in the white rows on the individual resource level (see figure below, 4) or in the details table 24 (5). Selected cells can be copied and pasted from or to Excel.

The numbers in the gray rows under the timeline are calculated values from the cells below (3).

In the left part of the table, the *Total Scope* column (2) summarizes the values of each row for the visible range under the timeline (see Timeline range 31).

In the *Comment* column (1), you can enter comments in the row with the name of the team, an absence, an operation, a project or resource.



Name	Comment	Location	Total Scope	2023 JUN	JUL	AUG
Team Service			10,952.00	170.00	78.00	-10.00
Absences			1,424.00	40.00	108.00	84.00
Vacation+			1,360.00	40.00	108.00	84.00
Project Availability			15,985.00	682.00	590.00	686.00
Sally		US	2,728.00	83.00	-3.00	59.00
Sam		DE	2,655.00	59.00	59.00	-33.00
Sean		US	2,353.00	7.00	27.00	7.00
Sonja		DE	2,570.00	19.00	13.00	-9.00
Absences			392.00		28.00	28.00
Vacation+			392.00		28.00	28.00
Project Availability			3,469.00	151.00	127.00	143.00

+Team Service > Absences > Vacation   Sum: 0

Name	Comment	Location	Total Scope	2023 JUN	JUL	AUG
_Gen Services		DE				
Sally		US	236.00		80.00	40.00
Sam		DE	448.00	40.00		
Sean		US	164.00			
Sonja		DE	392.00		28.00	28.00
Sven			120.00			16.00

Except for the Auto column 64, the other columns are read-only. They display information stored in CoReAdmin or the project planning tool.

2.1.1 Team level

➤ If the team is a parent team whose sub-teams are displayed, the data of the sub-teams are included in the calculation.

The row with the team name shows the utilization status of the entire team, i.e. the remaining availability.

It is calculated by:

status = capacity – (absences + operations + project commitments)

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	13,838.00	-16.00	85.00	120.00	292.00

The remaining availability is shown in heatmap colors according to preset thresholds.

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

Capacity is the total team capacity.

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	13,838.00	-16.00	85.00	120.00	292.00
Capacity	18,600.00	792.00	792.00	692.00	796.00

Absences summarizes the planned absences of the team.

The categories of absence are defined at team level. The category rows are automatically transferred to the individual resources in the lower part of the table. The data is entered at the individual resource level.

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	13,838.00	-16.00	85.00	120.00	292.00
Absences	1,032.00	184.00	32.00	212.00	40.00
Trade fair visit	64.00	32.00			
Vacation+	968.00	152.00	32.00	212.00	40.00

Operations summarizes the planned line operations of the team. There are two kinds of line operations:

- *General operations*: The categories are created at the team level. The data is entered at the individual resource level.
- *Individual operations*: Both the categories and the data are entered in the respective resource row.
  Identical individual operations (same operation name) of different resources are automatically summarized on one row at the team level.

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	*13,838.00*	**-16.00**	**85.00**	**120.00**	**292.00**
Operations	*933.00*	76.00	78.00	64.00	88.00
General Operations	*704.00*	58.00	58.00	58.00	58.00
Admin	*348.00*	22.00	22.00	22.00	22.00
Team Meeting	*356.00*	36.00	36.00	36.00	36.00
Individual Operations	*229.00*	18.00	20.00	6.00	30.00
App A	*58.00*	8.00	10.00	2.00	2.00
App C	*60.00*	8.00	8.00		4.00
App D	*74.00*				20.00
App E	*37.00*	2.00	2.00	4.00	4.00

Project Availability shows the project availability for the entire team, including the committed hours. It is calculated by:

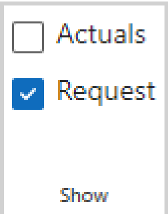
project availability = capacity – (absences + operations)

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	*13,838.00*	**-16.00**	**85.00**	**120.00**	**292.00**
Capacity	*18,600.00*	792.00	792.00	692.00	796.00
Absences	*1,032.00*	184.00	32.00	212.00	40.00
Operations	*933.00*	76.00	78.00	64.00	88.00
Project Availability	*16,635.00*	532.00	682.00	416.00	668.00

2.1.2 Project level

➤ If the team is a parent team whose sub-teams are displayed, the data of the sub-teams are included in the calculation.

The *Requests* and *Commitments* rows mentioned below are visible if *Request* is selected in the *Show* group of the menu bar:



Projects shows the status of all project commitments for the entire team. It is calculated by:

status = commitments – requests

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Capacity	*18,600.00*	792.00	792.00	692.00	796.00
Absences	*1,032.00*	184.00	32.00	212.00	40.00
Operations	*933.00*	76.00	78.00	64.00	88.00
Project Availability	*16,635.00*	532.00	682.00	416.00	668.00
Projects	*-864.00*	-72.00	80.00		

These data and the commitment status of the individual projects can be found when the *Projects* field is expanded. You will find:

- *Requests*: Sum of all requests from the projects
- *Commitments*: Sum of all project commitments done by the team leader
- List of all projects with resource requests for the actual team.
  Each row summarizes the status of commitments of the entire team for this project, calculated as commitment less request.

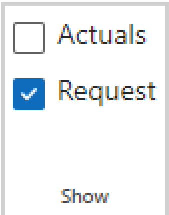
Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	*13,838.00*	**-16.00**	**85.00**	**120.00**	**292.00**
Capacity	*18,600.00*	792.00	792.00	692.00	796.00
Absences	*1,032.00*	184.00	32.00	212.00	40.00
Operations	*933.00*	76.00	78.00	64.00	88.00
Project Availability	*16,635.00*	532.00	682.00	416.00	668.00
Projects	*-864.00*	-72.00	80.00		
Requests	*3,661.00*	620.00	517.00	296.00	376.00
Commitments	*2,797.00*	548.00	597.00	296.00	376.00
MSP_Project 21					
MSP_Project 22					
MSP_Project 23					
MSP_Project 24		-80.00	80.00		
Requests	*320.00*	80.00	80.00	40.00	40.00
Commitments	*320.00*		160.00	40.00	40.00
Project A					
Project A1	*-544.00*				
Project B	*-56.00*	8.00			

The commitment status is shown in heatmap colors according to the thresholds. A green field without any number indicates that the commitment exactly equals the request. A red field indicates that 20% or more of the requested work time has not been committed yet.

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

2.1.3 Individual resource level

➤ The *Requests* and *Commitments* rows of individual resources are visible if *Request* is selected in the *Show* group of the menu bar:



This level shows the utilization status of the individual team resources, i.e. their remaining availability in hours. It is calculated by:

status = capacity – (absences + operations + commitments)

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	13,790.00	-16.00	77.00	120.00	252.00
Capacity	18,600.00	792.00	792.00	692.00	796.00
Absences	1,032.00	184.00	32.00	212.00	40.00
Operations	933.00	76.00	78.00	64.00	88.00
Project Availability	16,635.00	532.00	682.00	416.00	668.00
Projects	-944.00	-72.00			
Sally	**3,248.00**	**9.00**	**33.00**	**31.00**	**79.00**
Sam	**3,239.00**	**-9.00**	**37.00**	**17.00**	**53.00**
Sean	**3,001.00**	**-21.00**	**11.00**	**39.00**	**11.00**
Sonja	**3,232.00**	**19.00**	**-6.00**	**51.00**	**83.00**
Sven	**1,534.00**	**-14.00**	**2.00**	**-18.00**	**26.00**

The remaining availability is shown in heatmap colors according to preset thresholds. A green field without any number indicates that the remaining availability is zero and there is no overload. A yellow field indicates that the resource is overloaded with 10% or more of their capacity, a red field shows an overload of 20% or more.

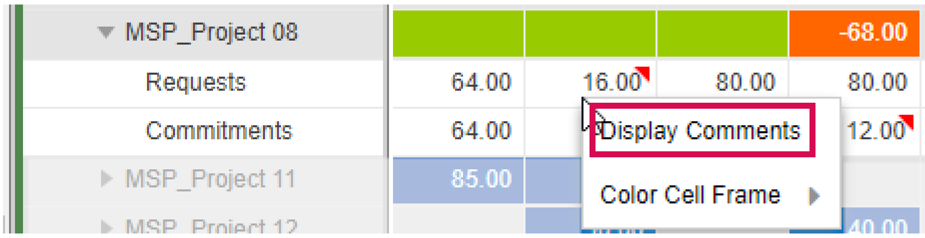
lower	-20%	-10%	0%	10%	20%	higher

For example, Sonja's status in November is marked green. She is overloaded with 6 hours in that month, but since this is below the threshold of 10%, the status is green. In October, December and January, Sonja's status is marked blue because she has a remaining project availability of at least 10%.

When the resource field is expanded, you will find the respective resource data structured in the same way as at the team level. It is in the white rows at the individual resource level where you enter the planning values for each of the resources.

Name	Total Scope	2023			
		OCT	NOV	DEC	JAN
Team Service	13,790.00	-16.00	77.00	120.00	252.00
Capacity	18,600.00	792.00	792.00	692.00	796.00
Absences	1,032.00	184.00	32.00	212.00	40.00
Operations	933.00	76.00	78.00	64.00	88.00
Project Availability	16,635.00	532.00	682.00	416.00	668.00
Projects	-944.00	-72.00			
_Gen Services	-464.00				
Sally	3,248.00	9.00	33.00	31.00	79.00
Sam	3,239.00	-9.00	37.00	17.00	53.00
Sean	3,001.00	-21.00	11.00	39.00	11.00
Sonja	3,232.00	19.00	-6.00	51.00	83.00
Capacity	4,128.00	176.00	176.00	152.00	176.00
Absences	296.00	24.00	16.00	32.00	
Vacation+	296.00	24.00	16.00	32.00	
Operations	199.00	17.00	17.00	13.00	13.00
Project Availability	3,633.00	135.00	143.00	107.00	163.00
Projects	20.00	56.00	88.00	32.00	80.00
Requests	381.00	60.00	61.00	24.00	
Commitments	401.00	116.00	149.00	56.00	80.00
MSP_Project 20	96.00			16.00	80.00
MSP_Project 23	80.00		64.00	16.00	
Project B	-40.00				
Project C					
Requests	68.00	32.00	12.00	24.00	
Commitments	68.00	32.00	12.00	24.00	

A red triangle in a *Requests* or *Commitments* row indicates that there are comments on the situation in this time phase. The comments can be accessed via right-click in the cell > *Display Comments*.

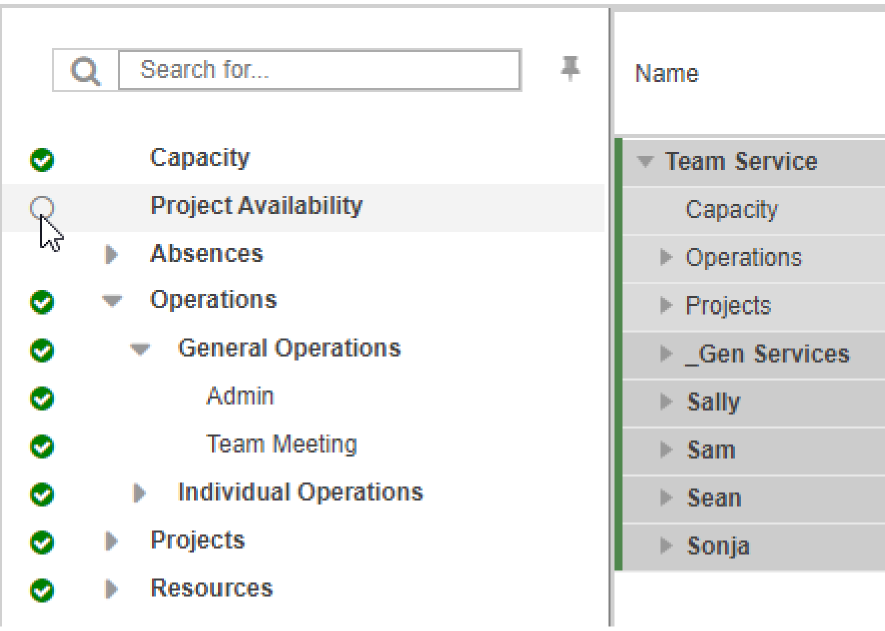


2.1.4 Row filters

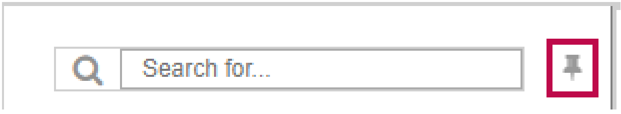
➤ This section describes general row filters. To filter for items with specific features, use predefined project filters 18 or filter based on custom field values 22. In the details table, you can filter by name 26.

When you open a team plan, the structure filter is shown by default. Here, you can hide or unhide the rows of the table except *Requests* and *Commitments*.

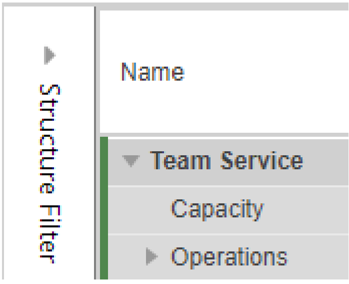
- To hide/unhide the rows, click the respective checkbox or the list item.
  By clicking on a higher grouping level, the entire group of items is filtered.
  To filter the list items of the structure filter, use the search function.



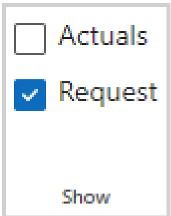
- To collapse the filter pane, click the pin icon.



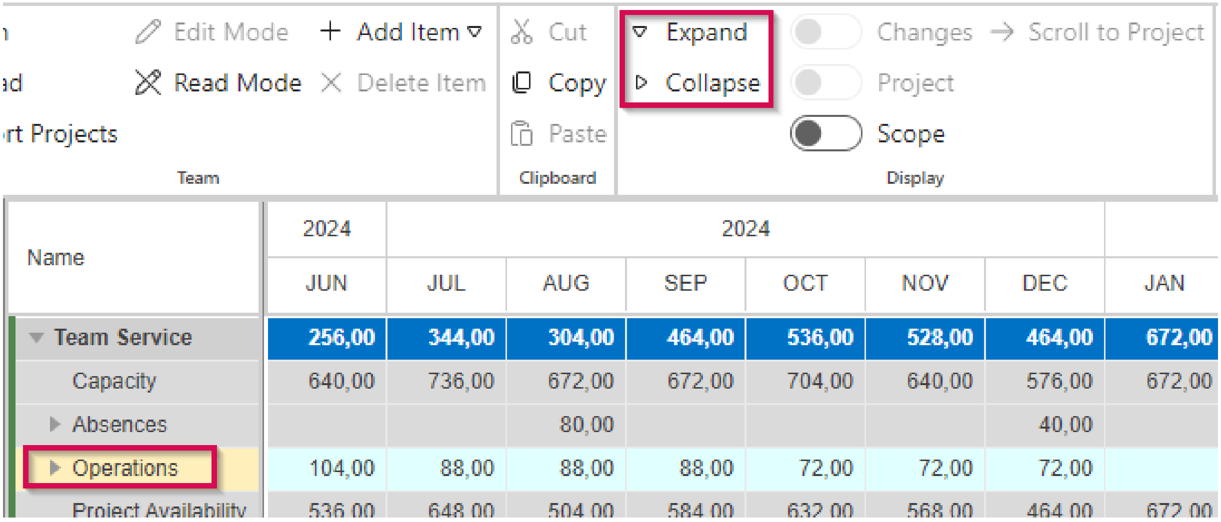
- To expand the collapsed filter pane and fix it to the table, click *Structure Filter* and then the pin icon, or click the arrow above *Structure Filter*.
  If you click only the lettering *Structure Filter*, the filter will collapse when you move the mouse off the filter pane.



- To display or hide the *Requests* and *Commitments* rows of the table, select or deselect *Request* in the *Show* group of the menu bar.



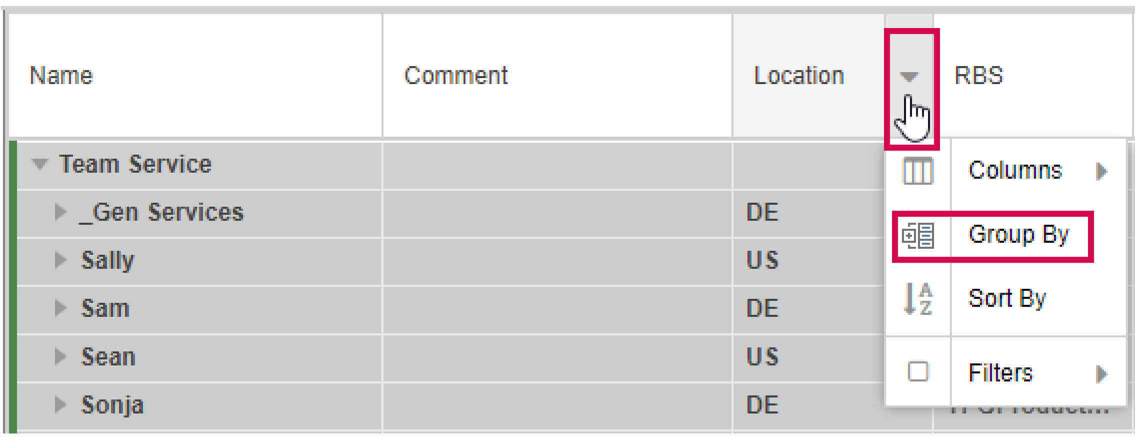
- To display or hide all sub-items of the selected item, use the *Expand* or *Collapse* button in the *Display* group.

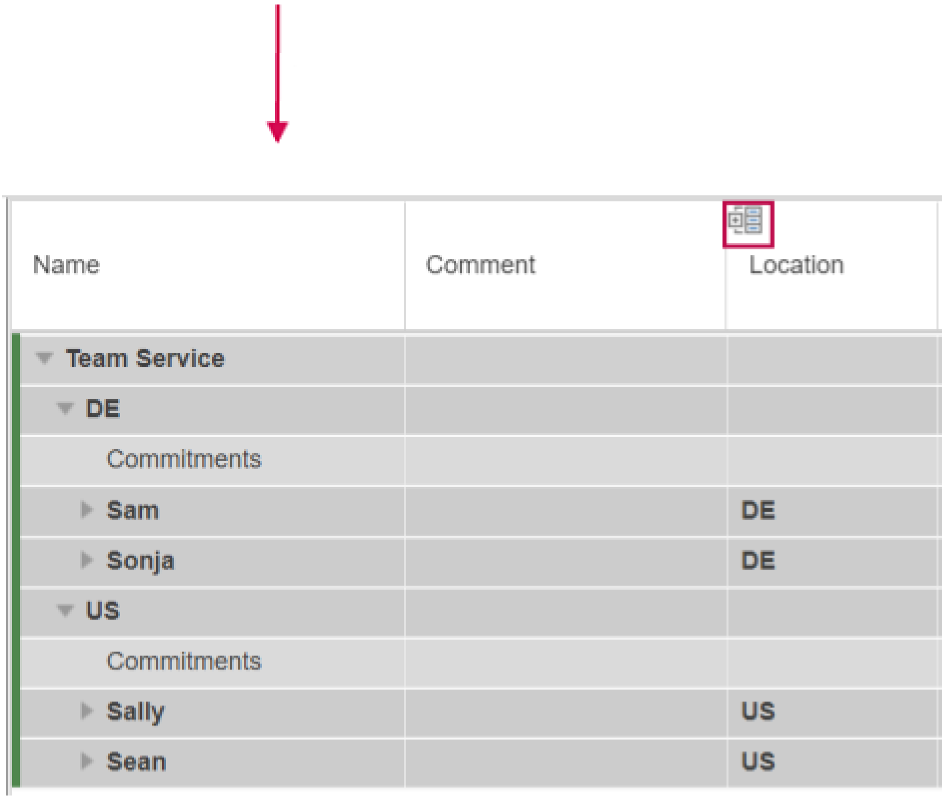


2.1.5 Row grouping

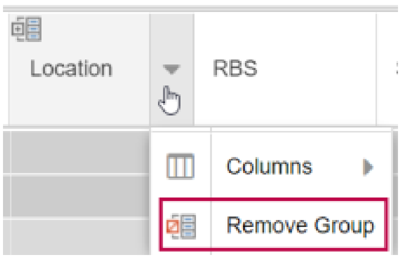
You can group the rows of the table by specific column entries. Multiple groupings are possible. The first grouping performed is the main grouping.
Groupings are saved by user.

- 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.





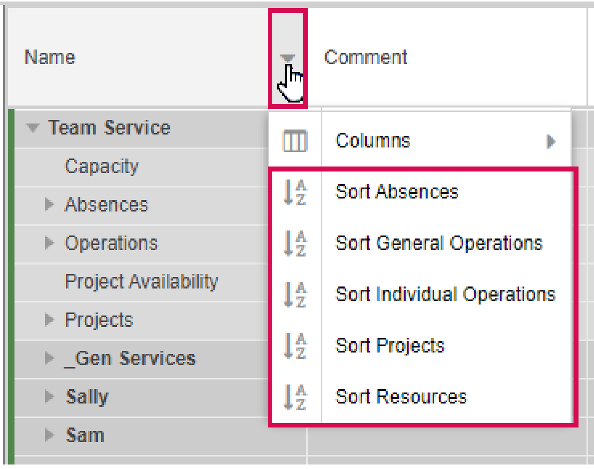
- To undo the grouping, click the arrow in the column header and select *Remove Group*.



2.1.6 Row sorting

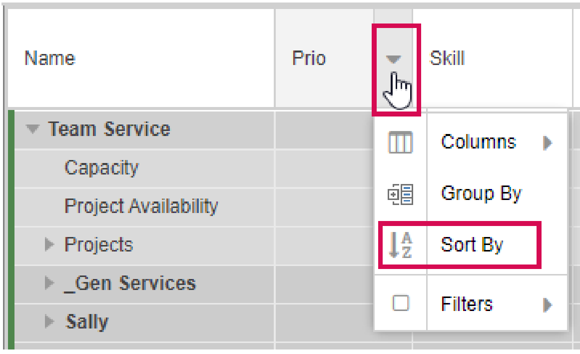
The sub-items of the groups in the *Name* column can be sorted for each group individually. The sorting will not be saved.

- Click the arrow that appears in the *Name* column header and select the group to be sorted. If there are user-defined groupings 16, they will be included in the options.



Projects and Resources can be sorted by custom fields. For example, you can sort projects by priority or resources by skill.

- Click the arrow that appears in the header of the corresponding column and select *Sort By*.



2.1.7 Predefined project filters

There are three predefined filters to focus on specific projects:

- projects that have been changed 19 in the source tool
- the selected project 19 only
- projects that have time-phased data 21 in the actual timeline scope

These filters will be applied on the projects selected in the filter pane at the left. Deselected resources and the *Capacity*, *Project Availability*, *Absences* and *Operations* rows will be hidden.

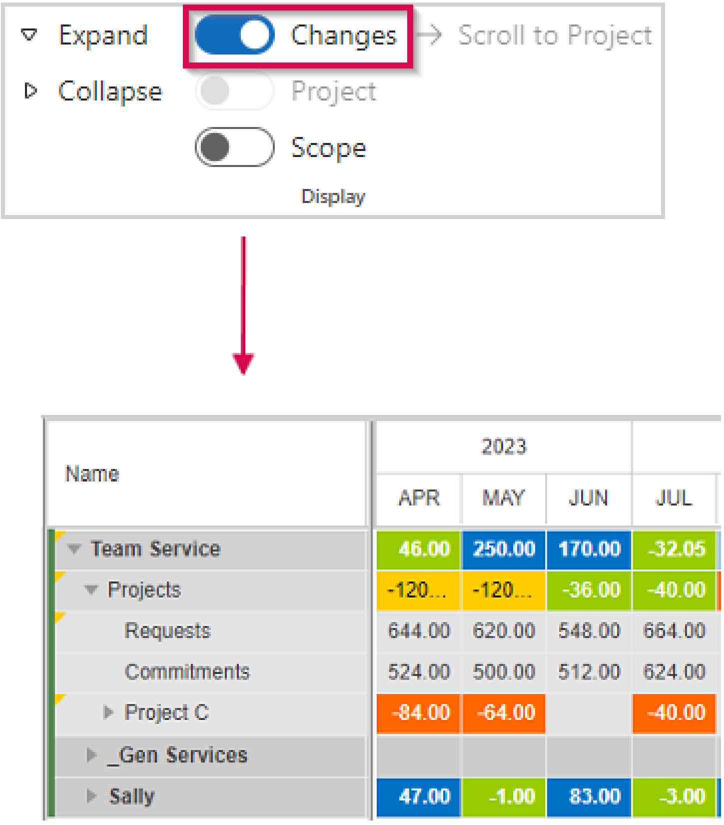
➤ While one of the project filters is applied, it is not possible to select or deselect further items in the filter pane.

Changed projects

When you import projects from the source tools, projects that have been changed since the last import are marked with a yellow triangle. To focus on these projects, you can filter out all other projects.

➤ While this filter is applied, the *Add Item* menu and the *Delete Item* button will be disabled, and it is not possible to import projects. Filtering via the filter pane will be disabled.

- Click the *Changes* filter in the *Display* group of the menu bar.



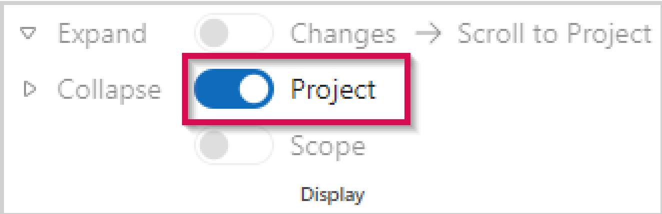
- To remove the filter, click the *Changes* filter again.

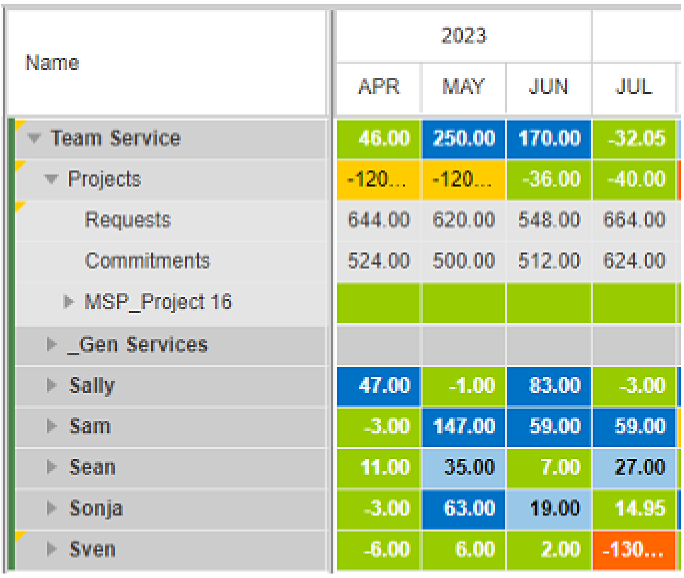
Selected project

To focus on a specific project, you can filter out all other projects.

➤ While this filter is applied, only assignments can be added via the *Add Item* menu. Filtering via the filter pane will be disabled.

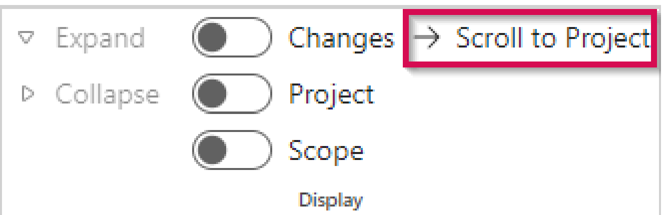
- Select the project on the project level or the individual resource level.
- Click the *Project* filter in the *Display* group of the menu bar.





Name	2023 APR	MAY	JUN	JUL
Team Service	46.00	250.00	170.00	-32.05
Projects	-120...	-120...	-36.00	-40.00
Requests	644.00	620.00	548.00	664.00
Commitments	524.00	500.00	512.00	624.00
MSP_Project 16				
_Gen Services				
Sally	47.00	-1.00	83.00	-3.00
Sam	-3.00	147.00	59.00	59.00
Sean	11.00	35.00	7.00	27.00
Sonja	-3.00	63.00	19.00	14.95
Sven	-6.00	6.00	2.00	-130...

- If the project will start in the future and you want the timeline to start with that date, click *Scroll to Project*.



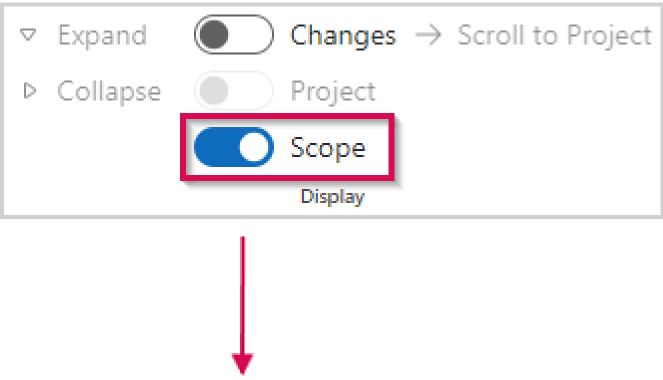
- To remove the filter, click the *Project* filter again.

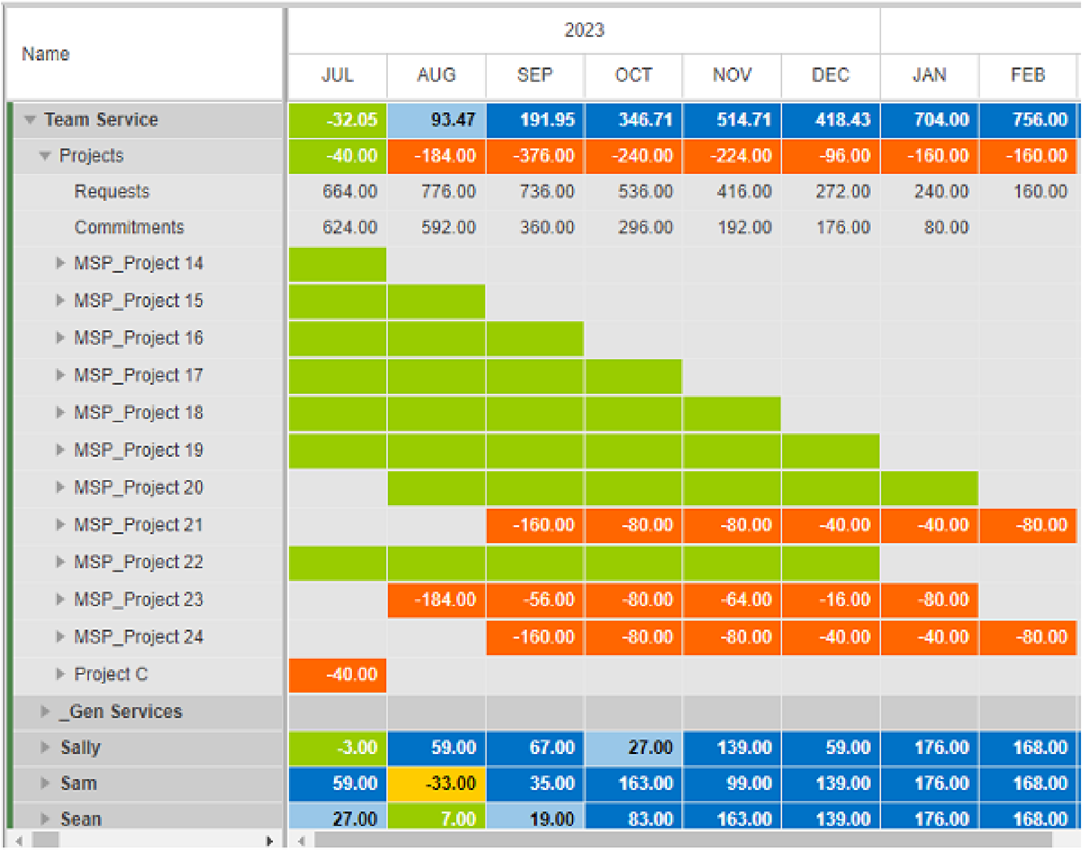
Projects in timeline scope

To see only projects that have time-phased data in the actual timeline scope, you can filter out all other projects:

➤ While this filter is applied, the *Add Item* menu is disabled. Filtering via the filter pane will be disabled.

- Click the *Scope* filter in the *Display* group of the menu bar.





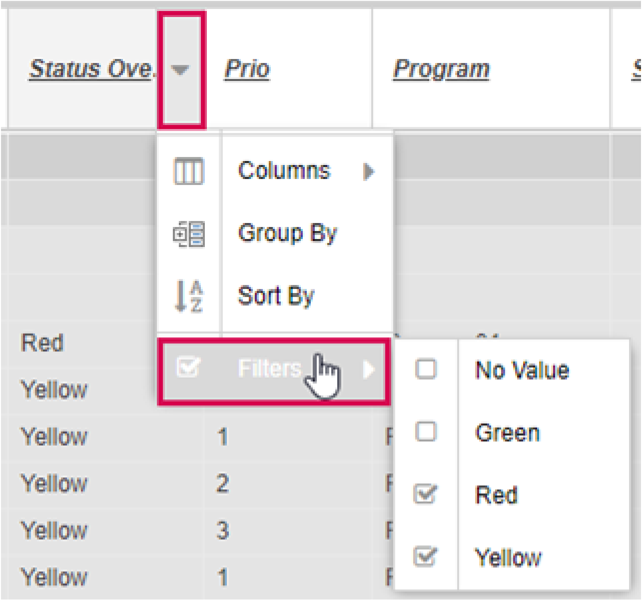
Name	2023 JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB
Team Service	-32.05	93.47	191.95	346.71	514.71	418.43	704.00	756.00
Projects	-40.00	-184.00	-376.00	-240.00	-224.00	-96.00	-160.00	-160.00
Requests	664.00	776.00	736.00	536.00	416.00	272.00	240.00	160.00
Commitments	624.00	592.00	360.00	296.00	192.00	176.00	80.00	
MSP_Project 14								
MSP_Project 15								
MSP_Project 16								
MSP_Project 17								
MSP_Project 18								
MSP_Project 19								
MSP_Project 20								
MSP_Project 21			-160.00	-80.00	-80.00	-40.00	-40.00	-80.00
MSP_Project 22								
MSP_Project 23		-184.00	-56.00	-80.00	-64.00	-16.00	-80.00	
MSP_Project 24			-160.00	-80.00	-80.00	-40.00	-40.00	-80.00
Project C	-40.00							
_Gen Services								
Sally	-3.00	59.00	67.00	27.00	139.00	59.00	176.00	168.00
Sam	59.00	-33.00	35.00	163.00	99.00	139.00	176.00	168.00
Sean	27.00	7.00	19.00	83.00	163.00	139.00	176.00	168.00

- To remove the filter, click the *Scope* filter again.

2.1.8 Filter based on custom field values

Projects and resources can be filtered by the values of custom fields. For example, you can filter projects by status or resources by skill.

- Go to the desired column header, click the arrow that appears and go to *Filters*.
- Deselect or select the values of which you want to hide or show the projects and resources. 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.

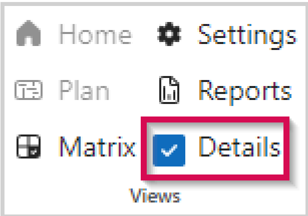
➤ The filters based on custom field values can be combined with the structure filter in the filter pane (see Row filters 14) and the predefined project filters 18. Combining the filter based on custom field values with the structure filter is accumulative. I.e., items filtered out due to their custom field values can be added by selecting them in the filter pane, and vice versa.

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

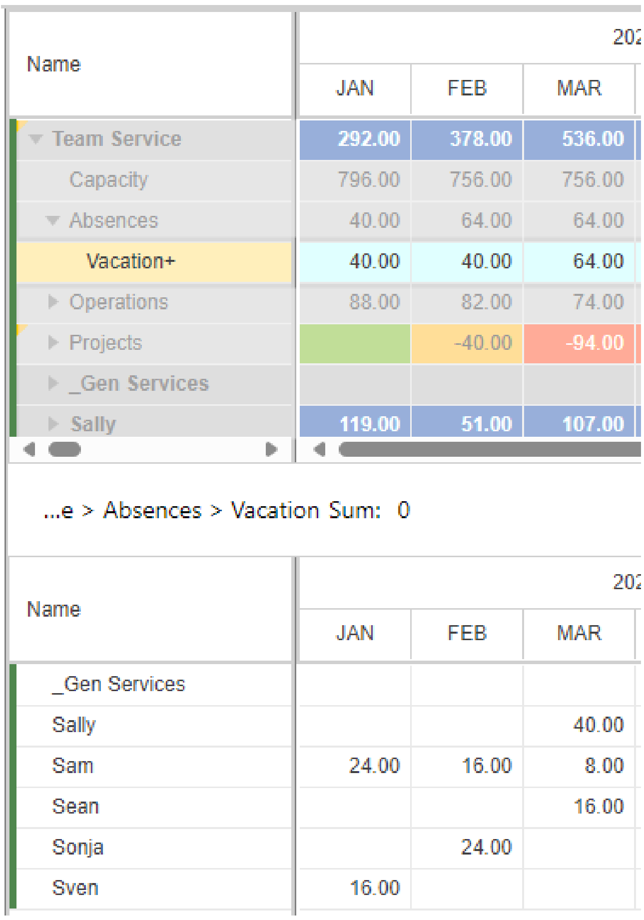
2.1.9 Details table

Details of a selected item can be shown and edited in a separate table below the main table. This is especially useful when you want to edit a specific group of data of all team resources at once.

- Select *Details* in the *Views* group of the menu bar.



- In the main table, select the item of which you want to see the details.
  In the example below, *Vacation* is selected. The details table shows the vacations of each of the team resources.



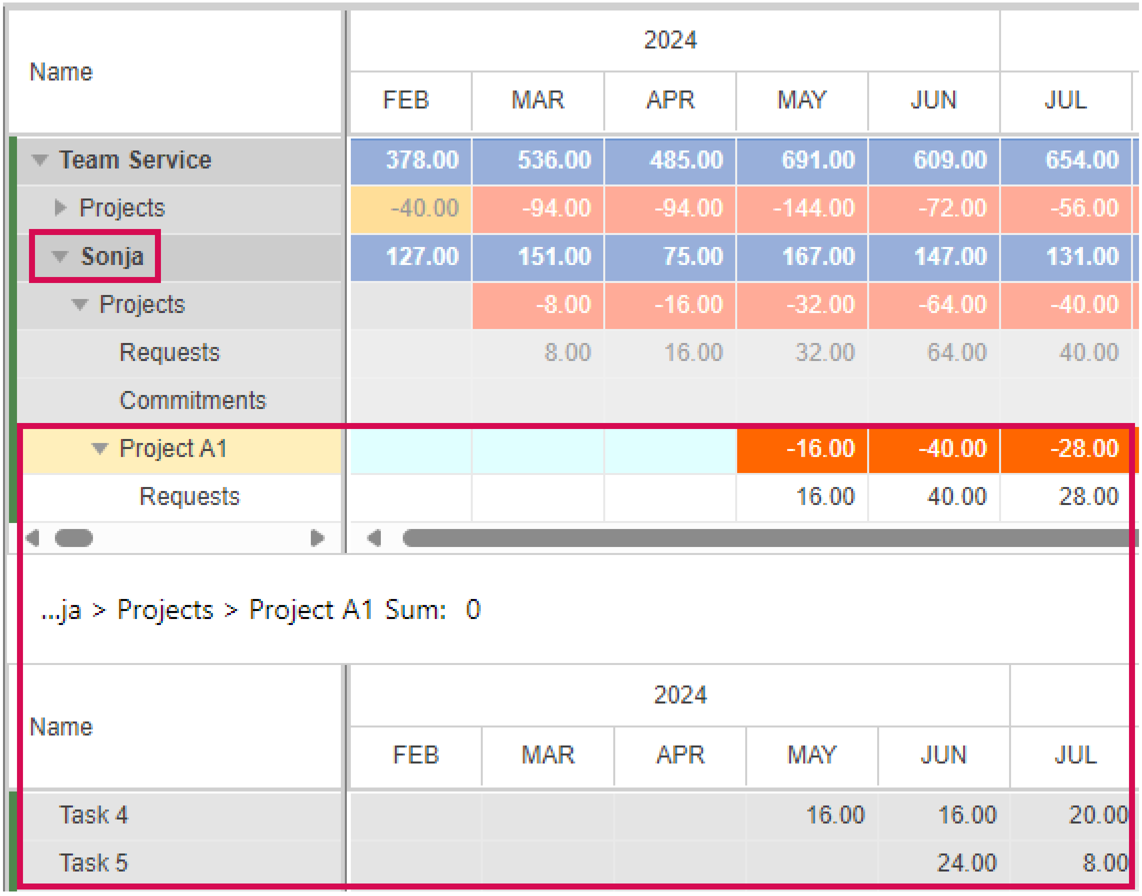
The *Sum* field above the details table shows the sum of selected cells. In this way you can, for example, display the annual planned work for a single resource.

➤ The selected cells can be copied and pasted from or to Excel.

Project tasks

In the *Details* view, you can display the project tasks of a resource request:

- In the main table, expand the field of a resource.
- Select a project from the sub-items or click the *Requests* row of that project.
  The respective tasks and their time-phased data will be shown in the details table.



Name	2024 FEB	MAR	APR	MAY	JUN	JUL
Team Service	378.00	536.00	485.00	691.00	609.00	654.00
Projects	-40.00	-94.00	-94.00	-144.00	-72.00	-56.00
Sonja	127.00	151.00	75.00	167.00	147.00	131.00
Projects		-8.00	-16.00	-32.00	-64.00	-40.00
Requests		8.00	16.00	32.00	64.00	40.00
Commitments						
Project A1				-16.00	-40.00	-28.00
Requests				16.00	40.00	28.00

...ja > Projects > Project A1 Sum: 0

Name	2024 FEB	MAR	APR	MAY	JUN	JUL
Task 4				16.00	16.00	20.00
Task 5					24.00	8.00

If you click a cell in the *Requests* row under the timeline, only the tasks which have data in the selected time phase will be displayed:

Name	2024					
	FEB	MAR	APR	MAY	JUN	JUL
Team Service	378.00	536.00	485.00	691.00	609.00	654.00
Projects	-40.00	-94.00	-94.00	-144.00	-72.00	-56.00
Sonja	127.00	151.00	75.00	167.00	147.00	131.00
Projects		-8.00	-16.00	-32.00	-64.00	-40.00
Requests		8.00	16.00	32.00	64.00	40.00
Commitments						
Project A1				-16.00	-40.00	-28.00
Requests				16.00	40.00	28.00

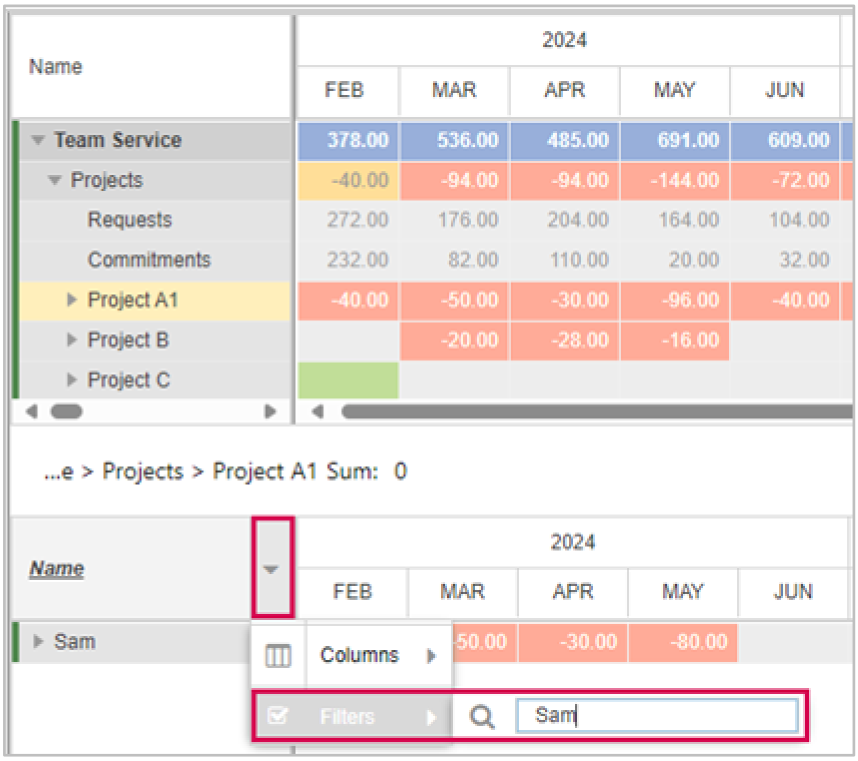
... > Project A1 > Requests Sum: 0

Name	2024					
	FEB	MAR	APR	MAY	JUN	JUL
Task 4				16.00	16.00	20.00

Name filter

The rows in the details table can be filtered by name. For example, you can filter for a specific resource.

- Go to the *Name* column header, click the arrow that appears and go to *Filters*.
- In the search field, enter the name of the item you want to show.
  The *Filters* checkbox will be selected automatically when you start typing. The filter will be applied as soon as a result is found.
  An underscore in the column header indicates that a filter is applied.



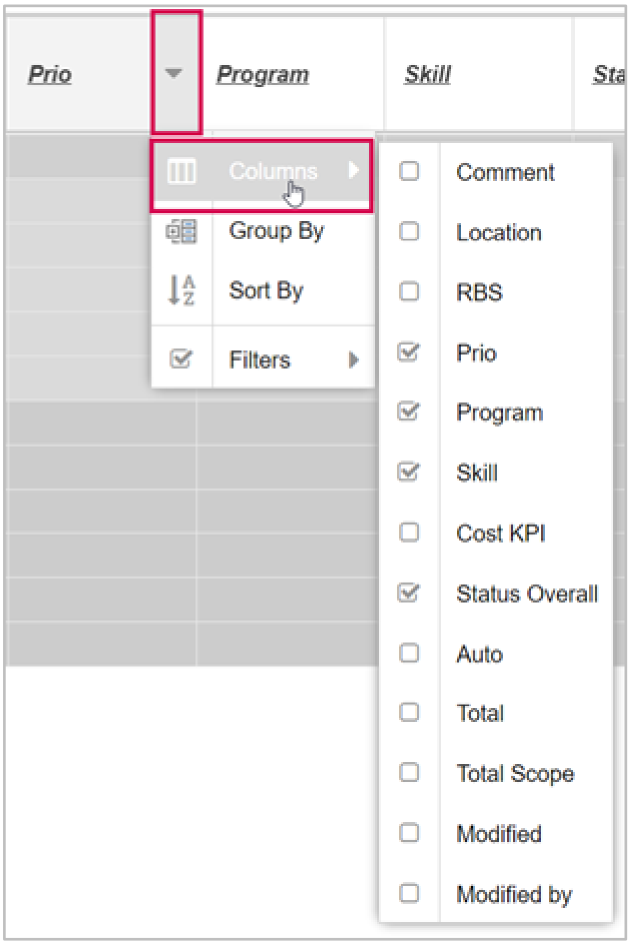
- To remove the filter, deselect the *Filters* checkbox in the drop-down menu.

2.1.10 Column filters and rearrangement

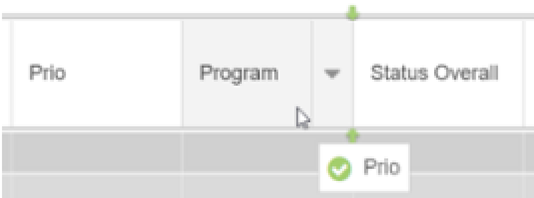
When you open a team plan in TPG TeamManager for the first time, the left part of the table will show only the *Name* column.

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.

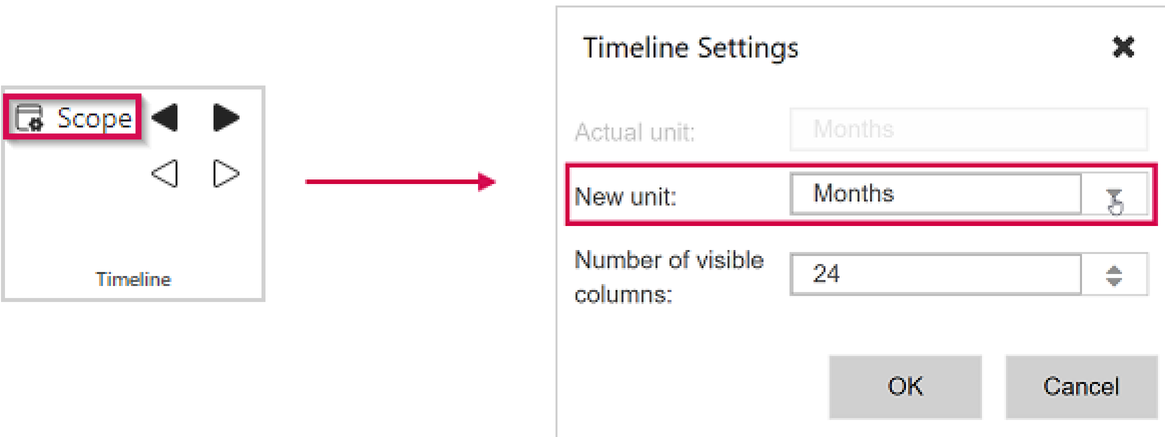


Program	Prio	Status Overall

2.1.11 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 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: 15.75h, Nov: 16.5h, Dec: 15.75h Jan: 8.12h, Feb: 7.38h, Mar: 8.49h

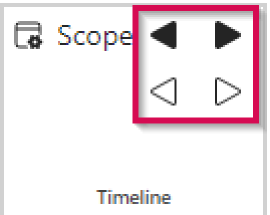
➤ When switching from months to weeks or from weeks to months, the accuracy of your inputs can get skewed. The reason is that weeks often go beyond months. To avoid skewed recalculation results, it is recommended that you choose and stick to a planning unit.

2.1.12 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.

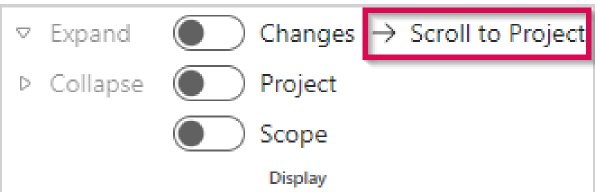
To shift the timeline start by units, use the buttons in the *Timeline* group of the menu bar:

- To shift the timline 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.



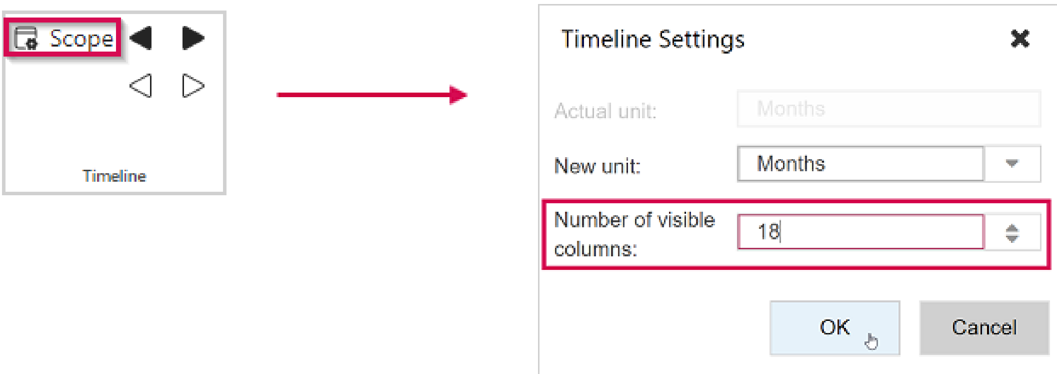
The timeline start can also be shifted to the data of a specific project. This is possible for projects that are running or will start in the future. The start date may be outside the current scope of the plan.

- Select the project either on the project level or the individual resource level.
- Click *Scroll to Project* in the *Display* group of the menu bar.



➤ This function does not scroll to dates in the past. *Scroll to Project* is enabled only if the selected project has time-phased data on or after the current date.
If the project has already started, the timeline start will shift to the current date.
If the project will start in the future, the timeline start will shift to the start date of the selected project.

- To change the number of planning units to be shown, click *Scope* in the *Timeline* group of the menu bar.
  - Enter the desired number of visible columns and click *OK*.

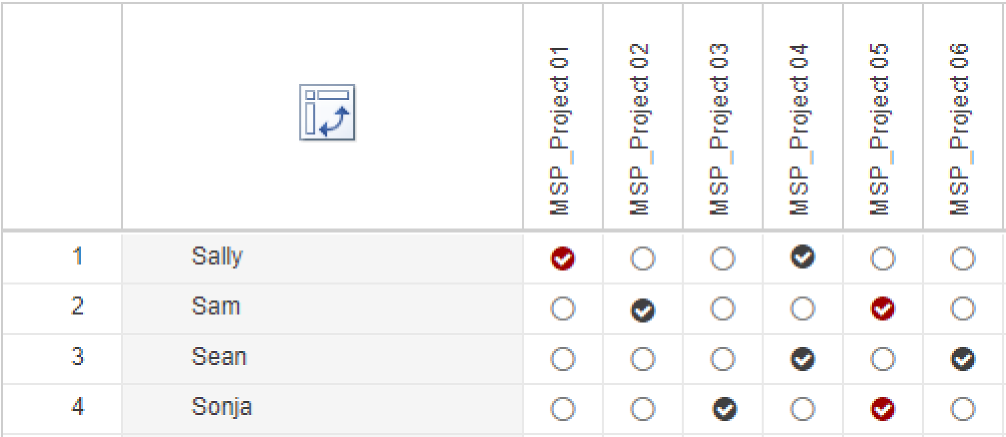


➤ Changing the number of visible columns can be used to see the summarized time-phased data of a specific time range in the *Total Range* column.

For changing the units themselves, see Timeline units 29.

2.2 Matrix

The *Matrix* view shows the assignment of the team resources to the projects. Here, you can make a rough planning by assigning resources to projects before going into detail in the *Plan* view.



Red background: assignment with commitment values in the team plan

Black background: assignment without commitment values in the team 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 commitment values of the respective project in the team 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.

Request and commitment values saved in CoRePlanner will be reloaded when you click the *Projects* button in the *Import* group of the menu bar.

2.2.1 Matrix filters

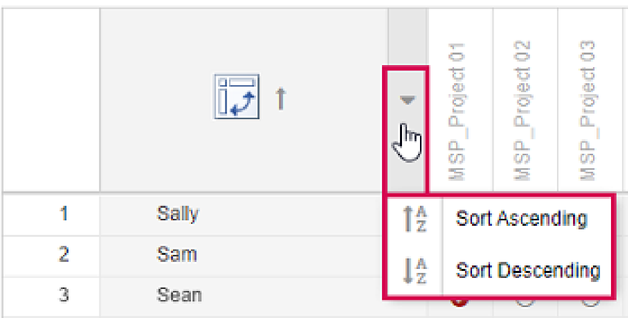
By default, the matrix shows the named resources of the team and 30 projects per page.

- 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 the generic resources, select *Generic Resources* (2).
- To show more or less projects, change the value in the *Columns per Page* field (3).

2.2.2 Sorting and rearrangement

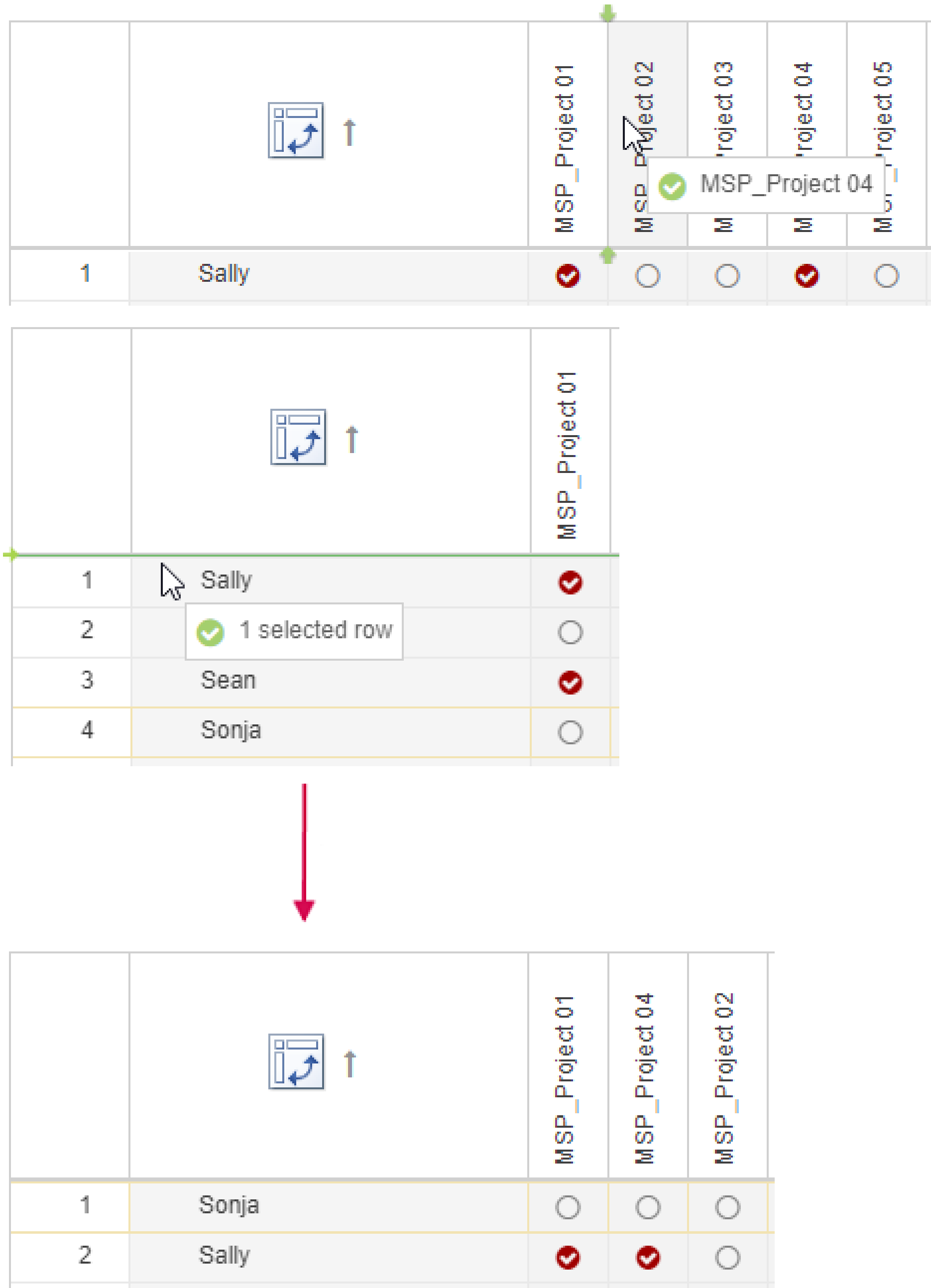
The order of the matrix rows can be switched between ascending and descending.

- Go to the field above the name column, click the arrow that appears and select the desired order.

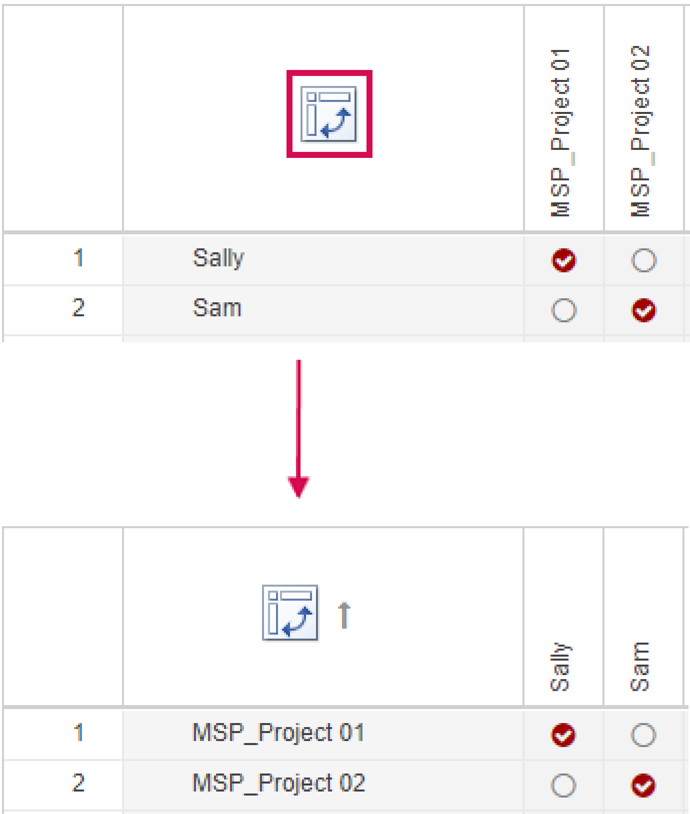


The order of rows and columns can be changed by drag and drop.

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



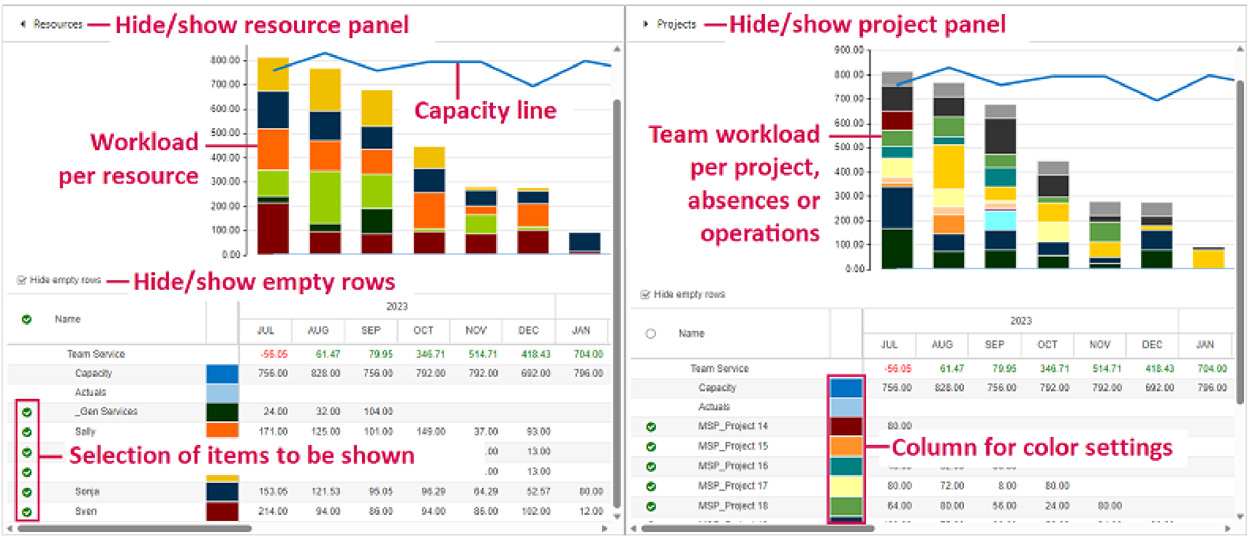
- To swap the arrangement of rows and columns, click the icon in the upper left corner.



2.3 Report

The *Report* view contains two adjoined diagrams with tables showing the resource utilization versus capacity.
When you open this view for the first time, the diagrams are black. You can assign colors 37 to the items according to your needs.

Both diagrams follow the same structure.
The *Resources* diagram shows the workload per resource and the total capacity.
The *Projects* diagram shows the workload of the entire team per project, absences or operations, and the total capacity.



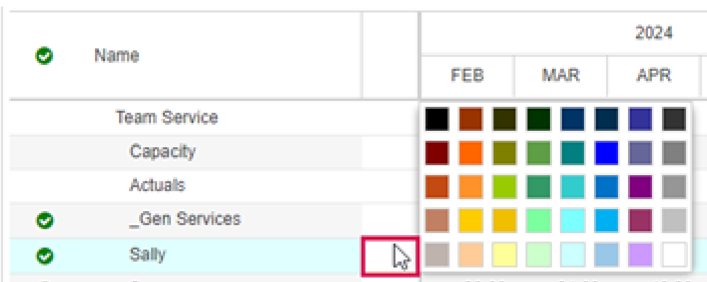
You can filter the items by selecting or deselecting the checkboxes in the tables. The diagrams will be adapted automatically to the selection.

When you hide the *Resources* panel, the *Projects* panel will expand over the whole width of the window, and vice versa.

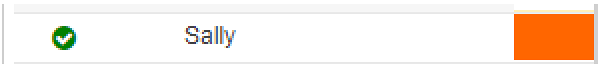
2.3.1 Coloring

Colors can be assigned to each item of a diagram individually.

- In the table below the diagram, click in the color cell of the respective item to open the color picker.
  When the *Report* view is opened for the first time, all color cells are white.



- Select a color from the color picker.
  The cell as well as the column or line in the diagram will change to the selected color.

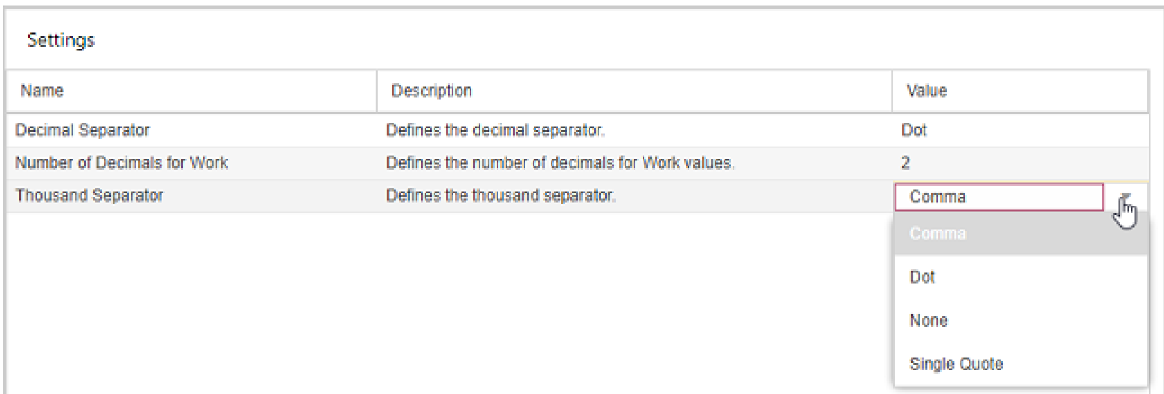


2.4 Settings

In the *Settings view,* you can define individual settings for the decimal separator, the number of decimal places and the thousand separator.
The settings will be permanently saved per user so that each user can define their own number format.

➤ The decimal sparator must be different from the thousand separator.
If you reduce the number of decimals, non-integer work values will be displayed as rounded.

- Double-click in the *Value* column of the format you want to change.
- Change the number of decimals, or open the drop-down menu and select a separator.



3 Planning Procedure

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

It explains how to

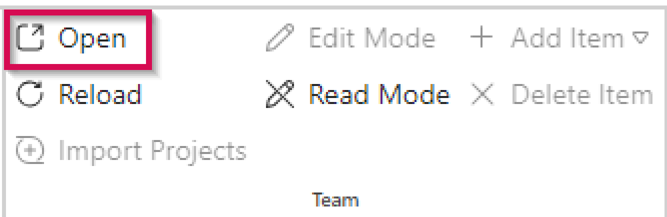
- open and check in/out 39 a team plan
- add rows for absences 42, general 44 and individual operations 48
- fill in time-phased data 51
- import project data 54
- add projects 57 that do not yet have resources assigned
- highlight 59 or comment 60 on time-phased data
- make resource commitments 63

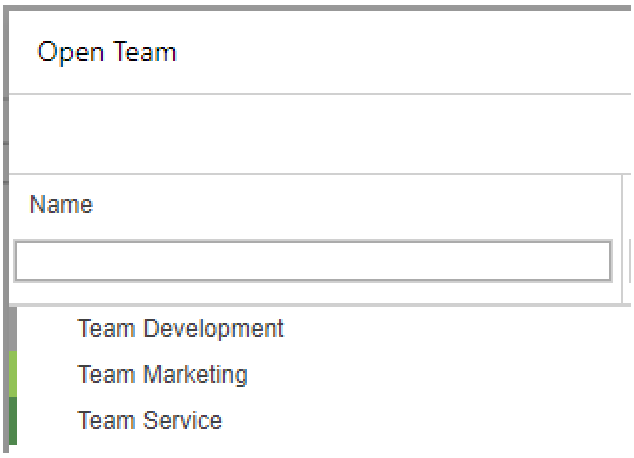
➤ Input data are saved automatically.
To see the last saved data from the projects, import the projects.

3.1 Checking in and out

When you start TPG TeamManager, you see an empty table. To view or enter data, first select and open a team.

- To open the list of teams, click *Open* in the *Team* group of the menu bar.



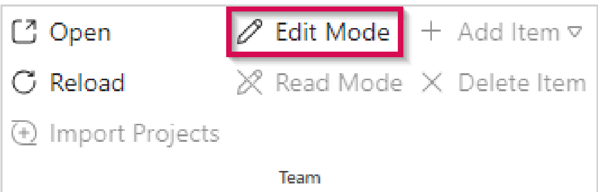


- To open a team plan, double-click its name, or select the name and click *Open* at the bottom right.
  If the teams are ordered in a hierarchical structure, you can open the plan of the parent and each of the sub-teams like single teams.
  See also Opening a parent team with sub-teams 41.

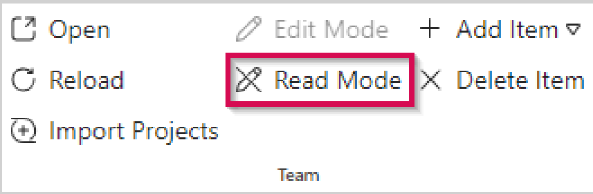
In TPG TeamManager, team data can be edited only by one user at a time. To edit a team plan, it must be checked out by you.
A colored line at the left edge indicates if a team plan is checked in or out. The colors are shown in the list of teams as well as in the opened team plan:

Gray: Someone else has set the team plan to the edit mode, i.e. it is checked out. You can open and read the team plan but cannot edit it.

Light green: The team plan is in the read mode, i.e. it is checked in. After opening the team plan, you can check it out by clicking *Edit Mode* in the *Plan* group of the menu bar.

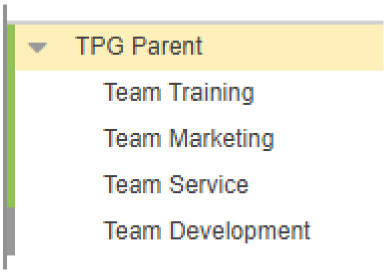


Dark green: The team plan has been checked out by you. After opening the team plan, you can edit it directly.
To enable other users to edit the team plan, check it in by clicking *Read Mode* in the *Plan* group of the menu bar.



3.2 Opening a parent team with sub-teams

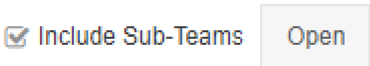
Teams can be ordered in a hierarchical structure:



You can open the plan of the parent and each of the sub-teams like single teams. The plan will contain only the data and resources of the selected team.

If you want to display the sub-teams together with the parent team:

- Select the parent team.
- Select *Include Sub-Teams* and click *Open*.

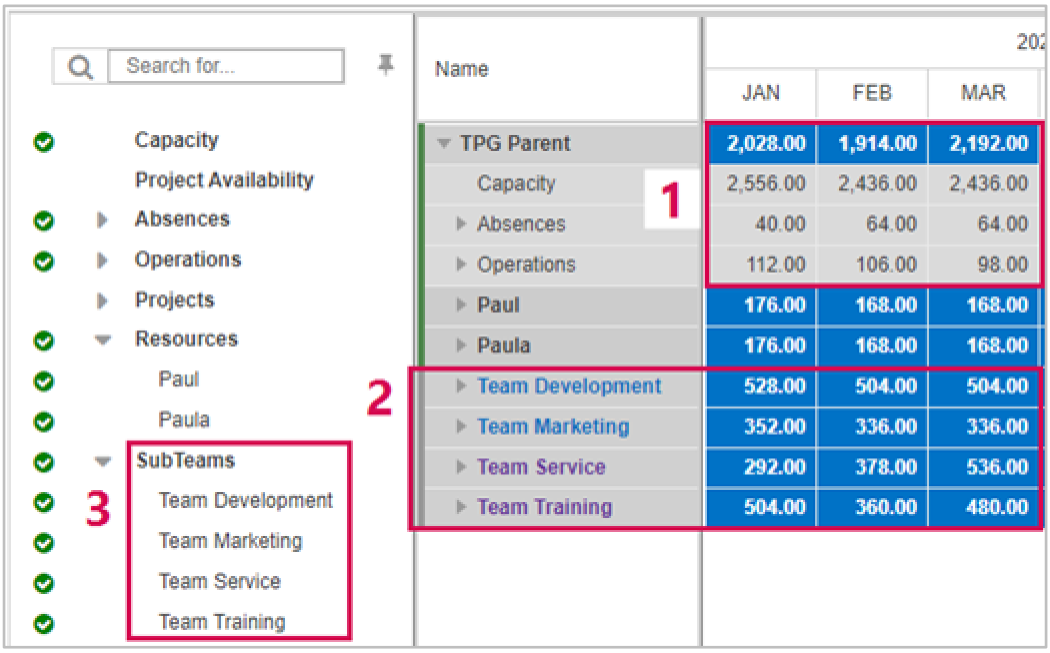


The plan will show the data of the sub-teams below the resources of the parent team. The data at team level (1) are the aggregated values of the parent and the sub-teams.

The sub-teams are read-only because data can only be edited in the plan of the respective team. Therefore, the sub-teams are marked with a gray line (2). You can open the plan of a sub-team in a new browser tab by clicking the team name.

If projects have already been imported (see Importing projects 54), the projects that have assignment requests for only the sub-teams will also be read-only.

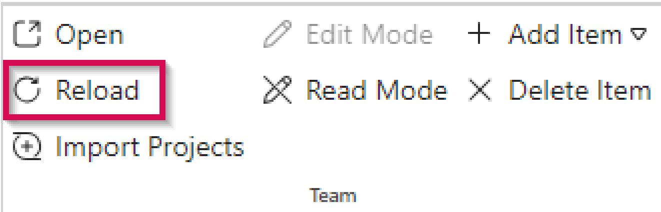
In the filter pane, the sub-teams are the lowest level (3) but in the main table, you can expand them to see all data.



3.3 Reloading a parent team with sub-teams

While you have opened a team with sub-teams, the sub-teams may be edited by someone else. To view the last saved data, you can reload the parent with the sub-teams:

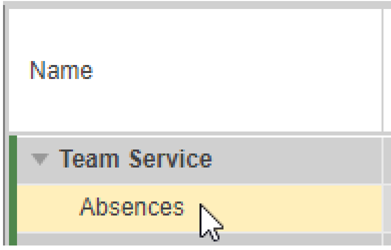
- Click *Reload* in the *Import* group of the menu bar.



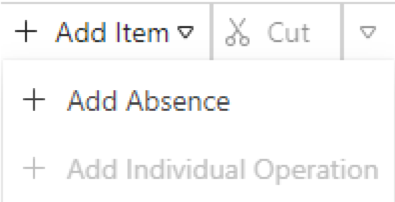
3.4 Adding absences

To get realistic capacity values for your team, you can add multiple categories of absences.

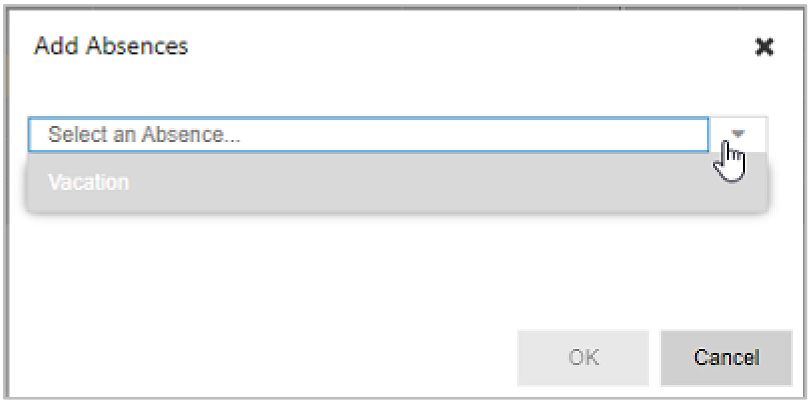
- Select *Absences* below the team name.
  For a better overview, you can hide the other rows at team level.



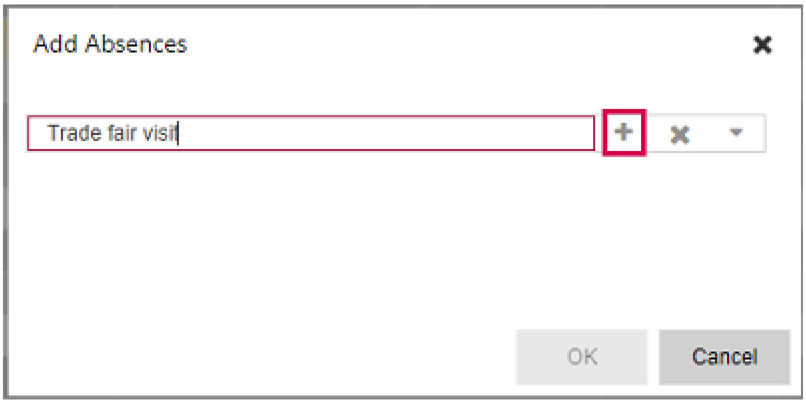
- In the *Edit* group of the menu bar, click the arrow next to *Add Item* and select *Add Absence*.



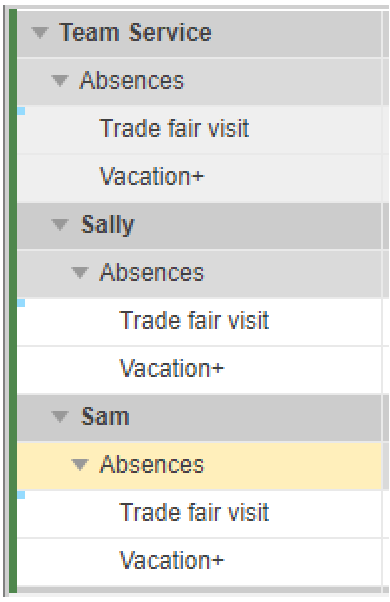
- Select one or more absence names from the drop-down menu.
  Alternatively, type the beginning of an absence name and select from the filtered options.



- If you type an absence name that does not yet exist, a plus icon appears. To add and select the new absence category, click the plus icon.
  The new category will be available only for your team.



- Click *OK*.
  The absence rows will be automatically added also to the individual resources.
  Team specific absence categories are marked with a blue square in the top left corner.

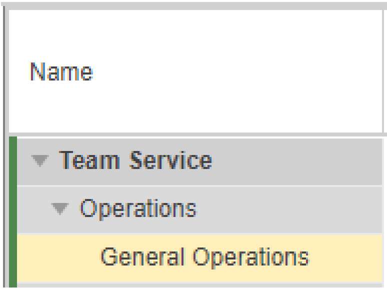


- Enter the time-phased data either individually for each resource in the main table or for several resources simultaneously in the details table (see Entering time-phased data 51).

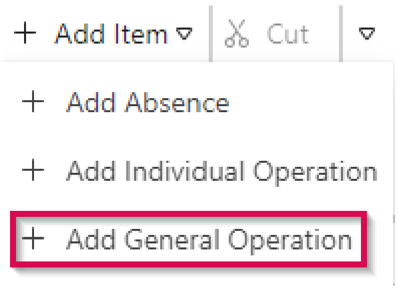
3.5 Adding general operations

To plan the time your team needs for non-project work, you can add multiple categories of general operations.

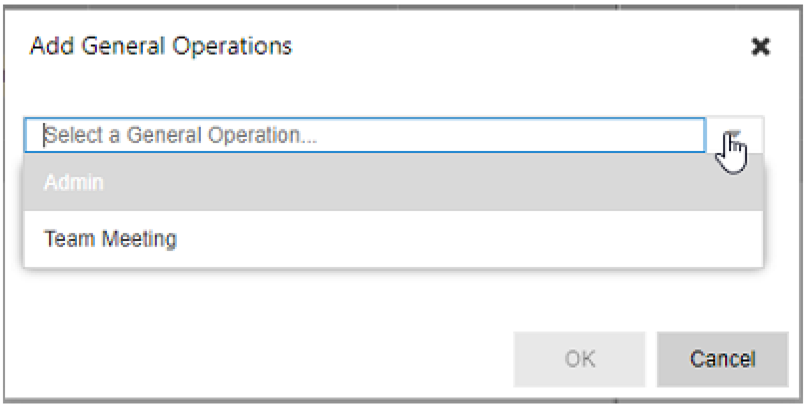
- Select *General Operations* below the team name.
  For a better overview, you can hide the other rows at team level.



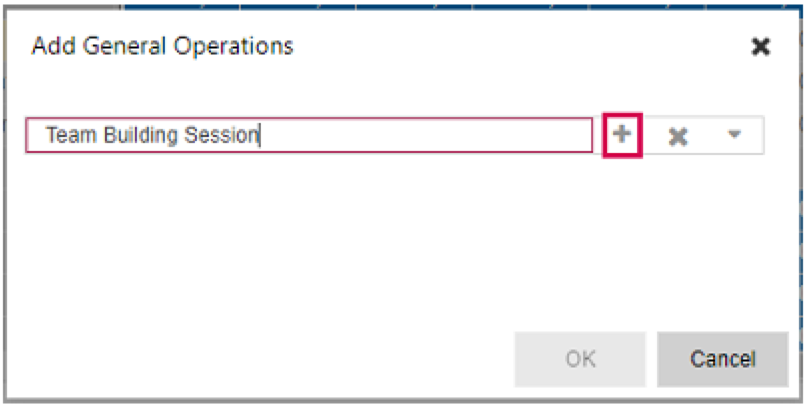
- In the *Edit* group of the menu bar, click the arrow next to *Add Item* and select *Add General Operation*.



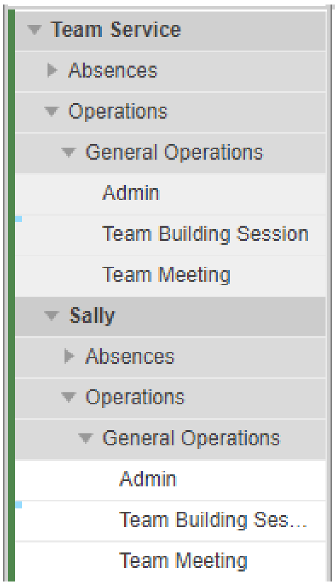
- Select one or more general operation names from the drop-down menu.
  Alternatively, type the beginning of a general operation name and select from the filtered options.



- If you type a general operation name that does not yet exist, a plus icon appears. To add and select the new general operations category, click the plus icon.
  The new category will be available only for your team.


Add General Operations
Team Building Session
OK
Cancel

- Click *OK*.
  The general operation rows will be automatically added also to the individual resources.
  Team specific general operations categories are marked with a blue square in the top left corner.

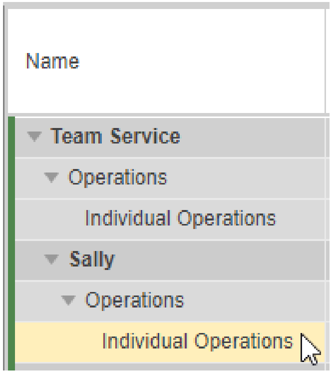


- Enter the time-phased data either individually for each resource in the main table or for several resources simultaneously in the details table (see Entering time-phased data 51).

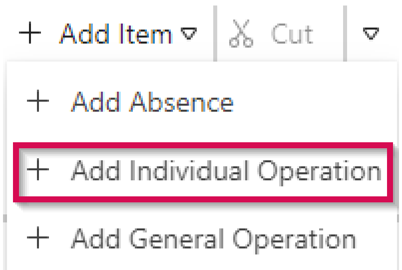
3.6 Adding individual operations

To plan the time your team needs for individual non-project work, you can add multiple categories of individual operations.

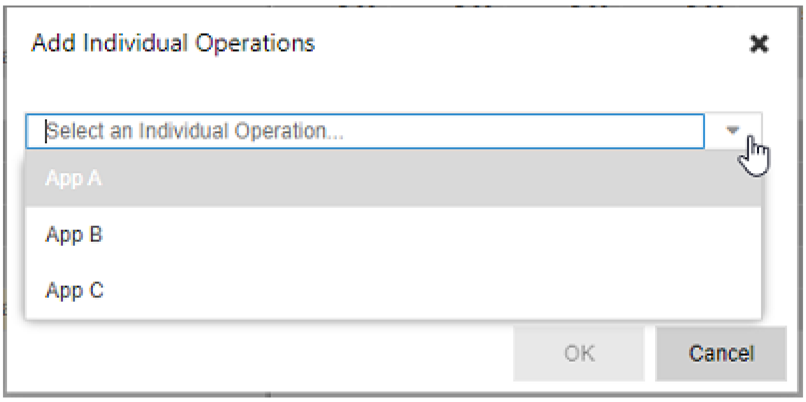
- Select *Individual Operations* below the name of an individual resource.
  For a better overview, you can hide the other rows at the individual resource level.



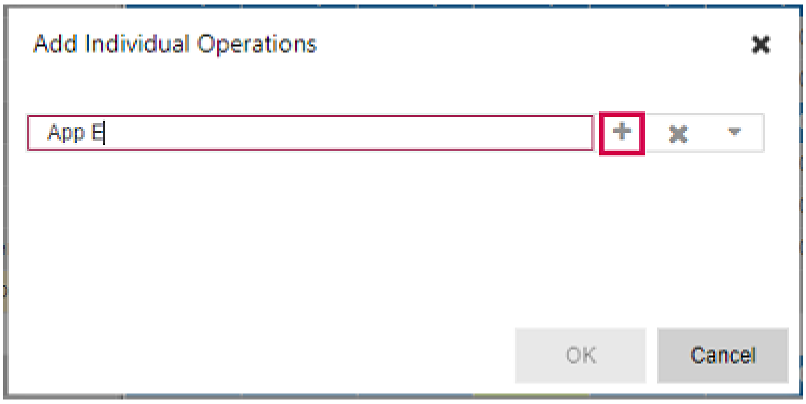
- In the *Edit* group of the menu bar, click the arrow next to *Add Item* and select *Add Individual Operation*.



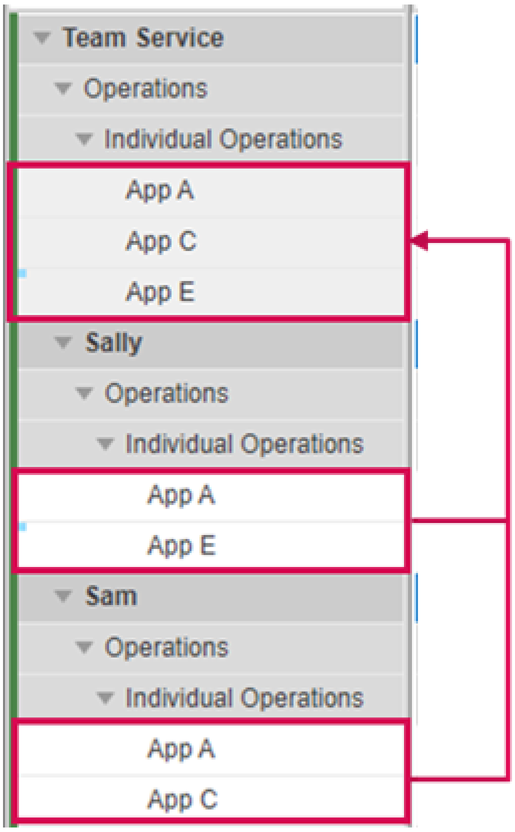
- Select one or more individual operation names from the drop-down menu.
  Alternatively, type the beginning of an individual operation name and select from the filtered options.



- If you type an individual operation name that does not yet exist, a plus icon appears. To add and select the new individual operations category, click the plus icon.
  The new category will be available only for the resource for whom it is created.



- Click *OK*.
  The individual operation rows will be automatically added also to *Individual Operations* at team level.
  Individual operation rows with identical names are combined in one row at the team level.
  Individual operations categories created by the team lead are marked with a blue square in the top left corner.



- Enter the time-phased data either individually for each resource in the main table or for several resources simultaneously in the details table (see Entering time-phased data 51).

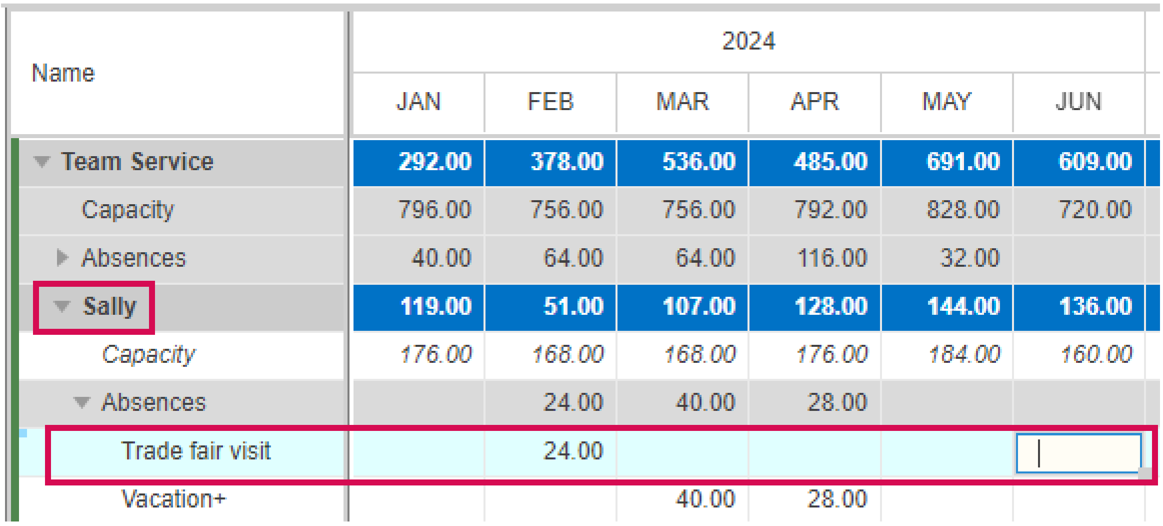
3.7 Entering time-phased data

All time-phased data are entered in the white lines either on the individual resource level or – for several resources simultaneously – in the details table.
Rows with a gray background contain automatically transferred or calculated values. As the aggregation of values at team level is automatic, the rows at this level are gray.

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

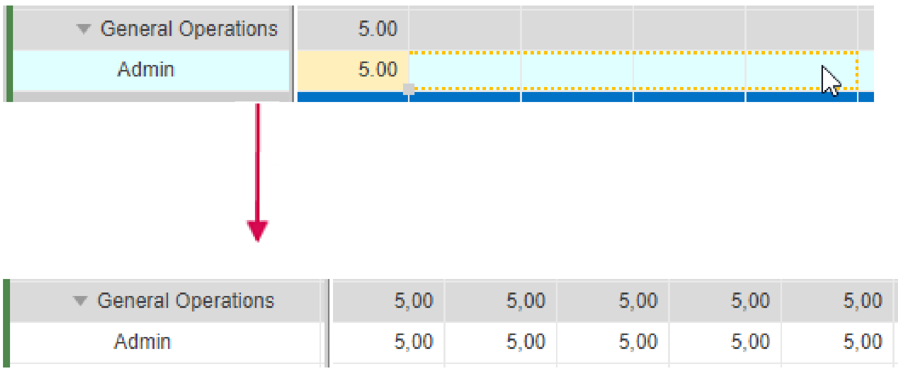
Entering data on the individual resource level

- Expand a resource field (here: *Sally*) and go to to the row of the item for which you want to allocate time (here: *Absences* > *Vacation*).
- Insert the 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:

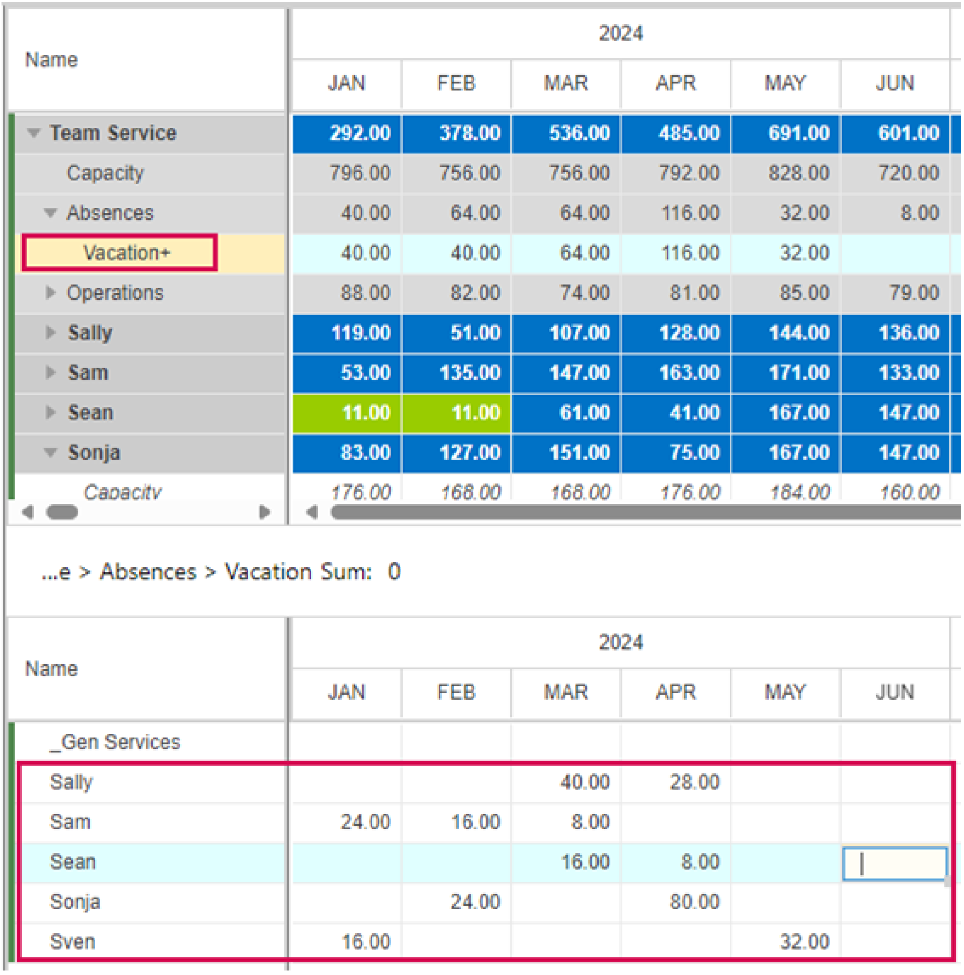
- Enter the value in the first cell of the period and drag the bottom right corner of the cell to the right.



Entering data in the details table

- At the team level, expand the item for which you want to allocate time and select a category (here: *Absences* > *Vacation*).

- Select *Details* in the *Views* group of the menu bar.
  The respective rows of the team members will be shown in the details table.



Name	2024 JAN	FEB	MAR	APR	MAY	JUN
Team Service	292.00	378.00	536.00	485.00	691.00	601.00
Capacity	796.00	756.00	756.00	792.00	828.00	720.00
Absences	40.00	64.00	64.00	116.00	32.00	8.00
Vacation+	40.00	40.00	64.00	116.00	32.00	
Operations	88.00	82.00	74.00	81.00	85.00	79.00
Sally	119.00	51.00	107.00	128.00	144.00	136.00
Sam	53.00	135.00	147.00	163.00	171.00	133.00
Sean	11.00	11.00	61.00	41.00	167.00	147.00
Sonja	83.00	127.00	151.00	75.00	167.00	147.00
Capacity	176.00	168.00	168.00	176.00	184.00	160.00

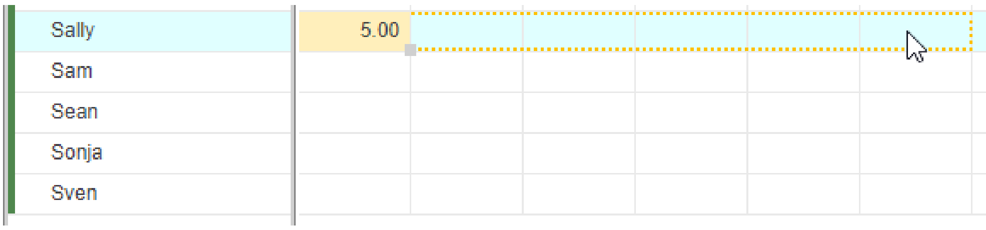
...e > Absences > Vacation Sum: 0

Name	2024 JAN	FEB	MAR	APR	MAY	JUN
_Gen Services						
Sally			40.00	28.00		
Sam	24.00	16.00	8.00			
Sean			16.00	8.00		
Sonja		24.00		80.00		
Sven	16.00				32.00	

In the details table, you can enter the same value for many subsequent time phases and/or several resources by drag and drop:

- Enter the value in the first cell.

- Drag the bottom right corner of the cell vertically or horizontally to copy the values. Drop the corner and then drag it to the other direction.



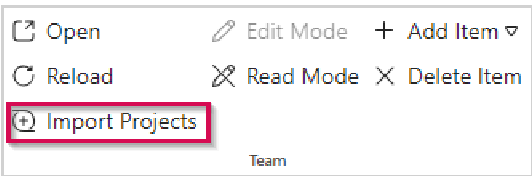
Sally	5.00	5.00	5.00	5.00	5.00	5.00
Sam						
Sean						
Sonja						
Sven						

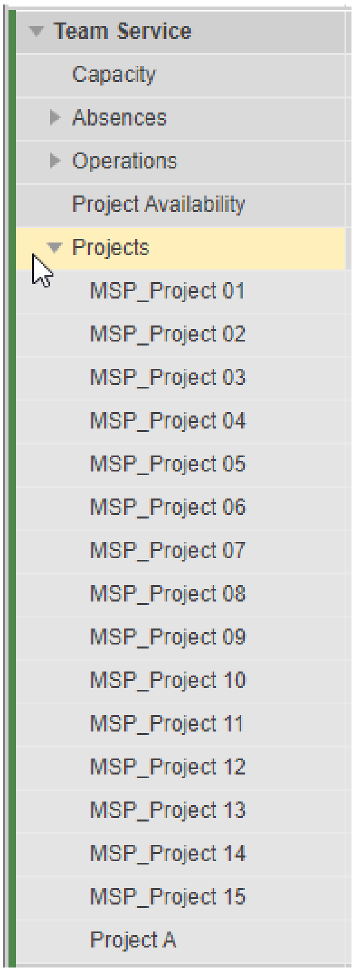
Sally	5.00	5.00	5.00	5.00	5.00	5.00
Sam	5.00	5.00	5.00	5.00	5.00	5.00
Sean	5.00	5.00	5.00	5.00	5.00	5.00
Sonja	5.00	5.00	5.00	5.00	5.00	5.00
Sven	5.00	5.00	5.00	5.00	5.00	5.00

3.8 Importing projects

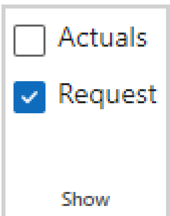
After entering the absences and line operations of the resources, the next step is to import the projects with assignments using your team resources.

- In the *Import* group of the menu bar, click *Projects*.
  All projects that have assignment requests for your team will appear at the team level of your plan.
  If you have opened a parent team with sub-teams, the projects that have assignment requests for only the sub-teams will appear in addition. These projects will be read-only.





At the individual resource level, the assigned projects are listed as well.
The requested plan values from the projects are shown in the *Request* row. If the row is not shown, select *Request* in the *Show* group of the menu bar.



As the values in the *Request* row are not yet committed, they are not included in the calculation of the resource utilization.

Name	2023		2024				
	NOV	DEC	JAN	FEB	MAR	APR	MAY
Team Service	**638,00**	**552,00**	**545,00**	**490,00**	**654,00**	**496,00**	**664,00**
Project Availability	638,00	552,00	545,00	490,00	654,00	496,00	664,00
Projects	-458,00	-452,00	-306,00	-336,00	-16,00	-20,00	-20,00
Requests	458,00	452,00	306,00	336,00	16,00	20,00	20,00
Commitments							

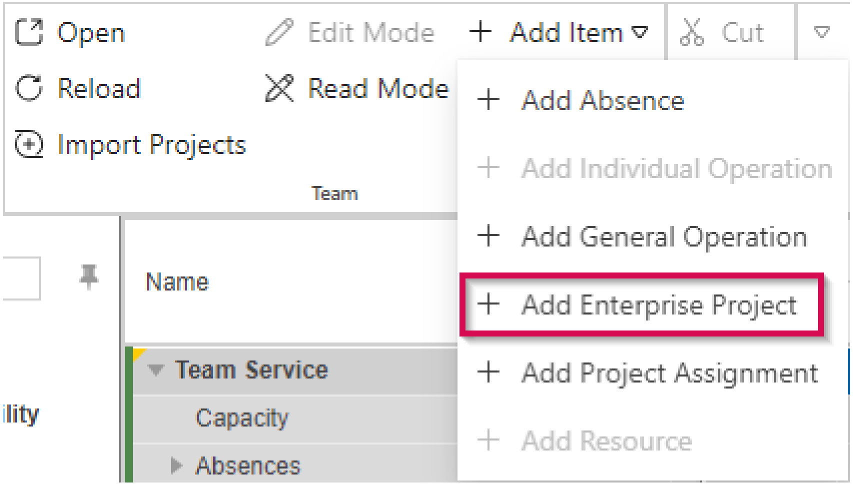
If changes are made in the source projects and you import projects later again, all affected rows will be marked with a yellow triangle.
In the example below, the project manager of *Project A* has changed work data for Sam:

Name
Team Service
Capacity
Absences
Operations
Project Availability
Projects
_Gen Services
Sally
Sam
Capacity
Absences
Operations
Project Availability
Projects
Requests
Commitments
MSP_Project 20
Project A

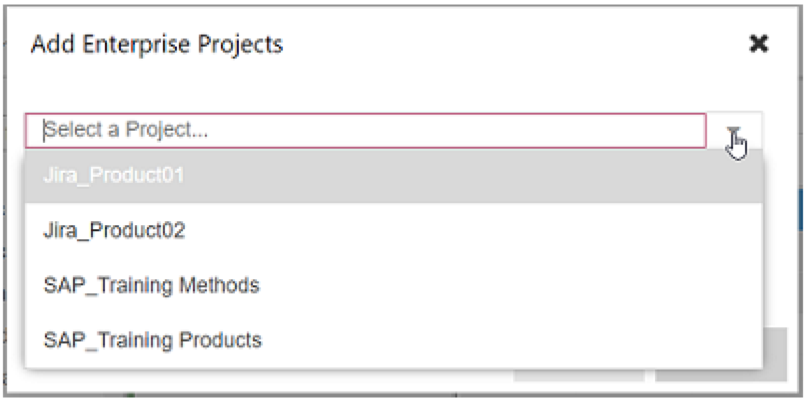
3.9 Adding enterprise projects

Your company may be planning projects that do not yet have any assignments to your team but will need resources of your team. These projects will not be added to your plan via the import function. Instead, you can add them individually:

- In the *Edit* group of the menu bar, click the arrow next to *Add Item* and select *Add Enterprise Project*.



- Select the project(s) from the drop-down menu.
  Alternatively, type the beginning of the project name and select from the filtered options.



- Click *OK*.
  The project will be listed only on the project level of your plan as no team resource is assigned yet.

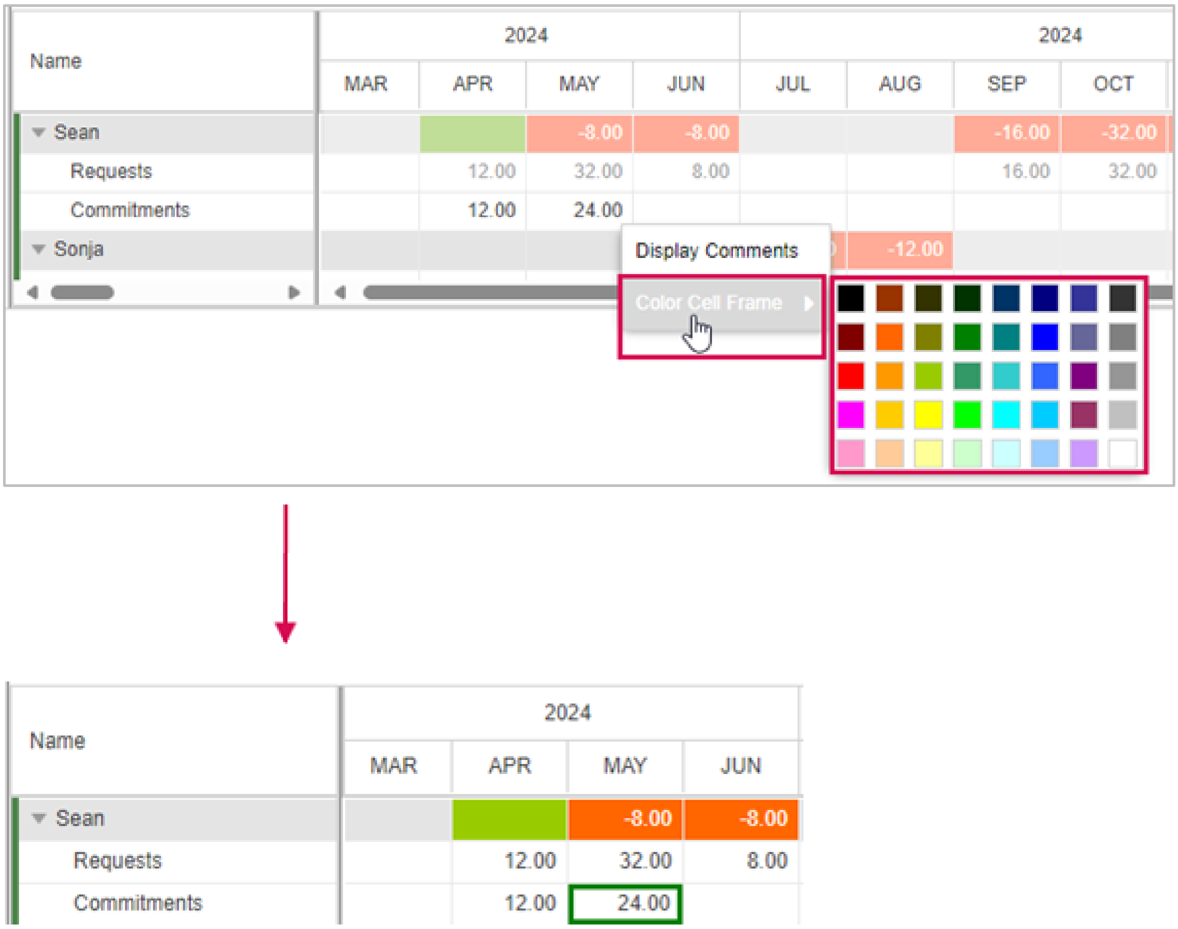
- Assign members of your team to the project (see Adding resources to projects 68) and commit them for at least one time phase (see Committing personal resources 66).

➤ When you import projects next time, projects that do not have any request or commitment data will be deleted from the team plan.

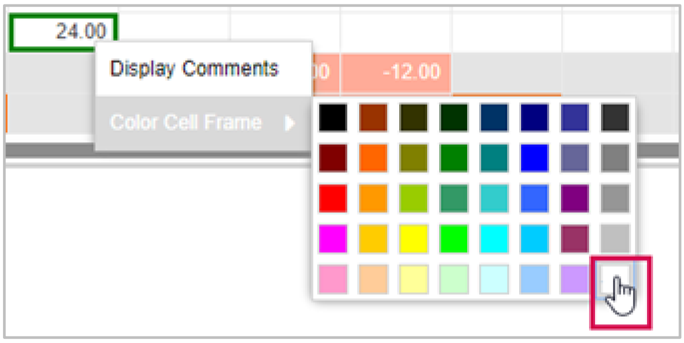
3.10 Highlighting time-phased data

For multiple purposes, it may be helpful to highlight the cells of specific time phases. For example, you can highlight cells when data are missing or need to be checked later. Highlighting cells is possible in the *Requests* and *Commitments* rows either on the individual resource level or in the details table. The cells will be highlighted with a color frame.

- In the main table, go to a resource and expand a project.
- Alternatively, select a project in the main table and select *Details* in the *Views* group of the menu bar.
  - Expand one of the resources shown in the details table.
- Right-click in the cell you want to highlight.
- Go to *Color Cell Frame* and select a color.



- If you want to remove the color frame, select the white tile in the color palette.



- Cells with comments will be Rolled up to higher levels, so that you can see on Resource or Project level are Details which are possibly collapsed shown as a green triangle.

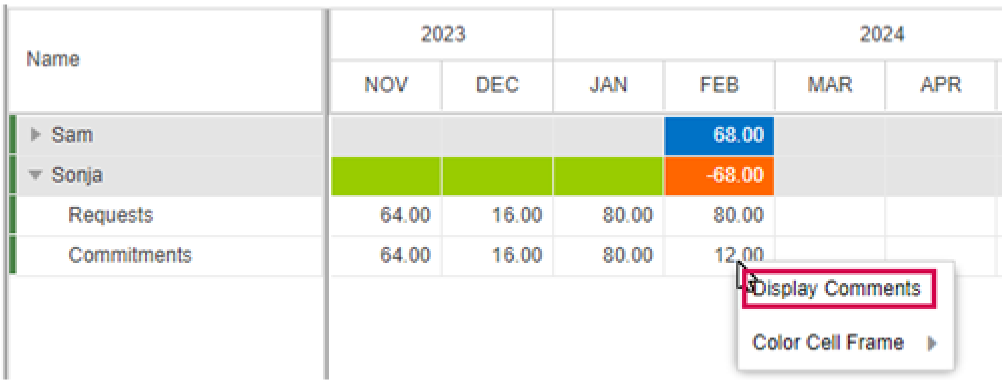
3.11 Entering/Deleting time-phased comments

Sometimes you may want to enter a comment on the situation in a specific time phase. Time-phased comments can be entered in the *Requests* or *Commitments* rows either on the individual resource level or in the details table.

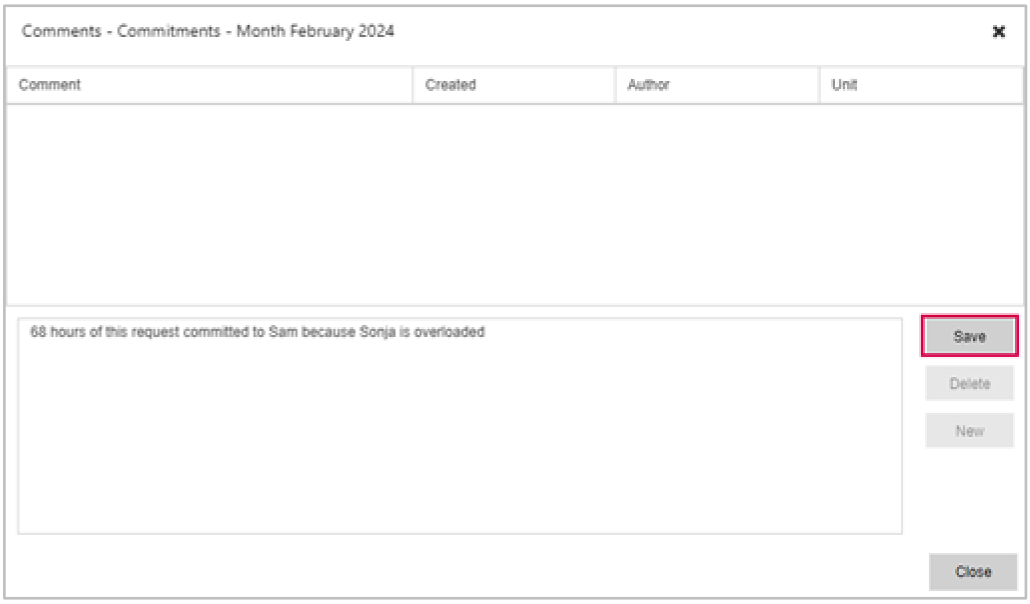
- In the main table, go to a resource and expand a project.
- Alternatively, select a project in the main table and select *Details* in the *Views* group of the menu bar.

- Expand one of the resources shown in the details table.

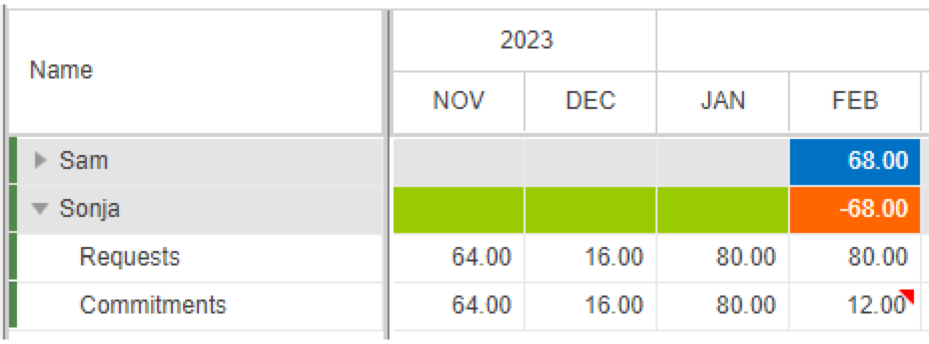
- Right-click in a cell under the timeline and select *Display Comments*.



- Enter your comment in the lower part of the window and click *Save*.
  The comment will be displayed in the upper part of the window.

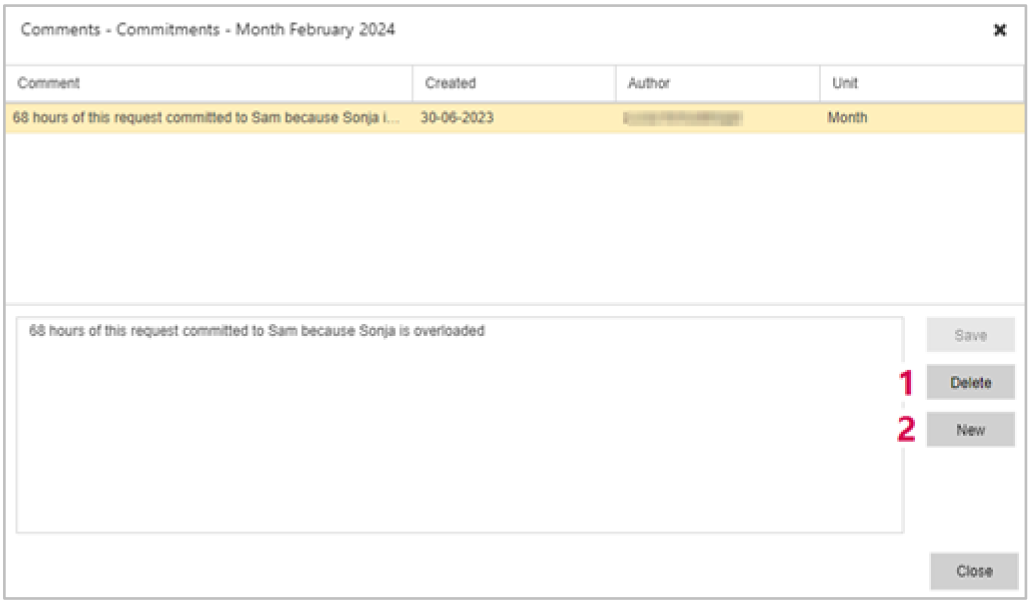


- Click *Close* at the bottom right.
  In the table, a red triangle will indicate that there is a comment for this time phase.



➤ Comments and red triangles will be displayed when the timeline unit is the same or a smaller one than at the time of entering the comment. For example, if you change the timeline unit from months to weeks, the red triangle and the link to the comments window will be shown in each week of the month.
If you change the timeline unit to a larger unit than at the time of entering the comment, e.g. from months to quarters, the red triangles will not be shown and the comments can't be accessed.

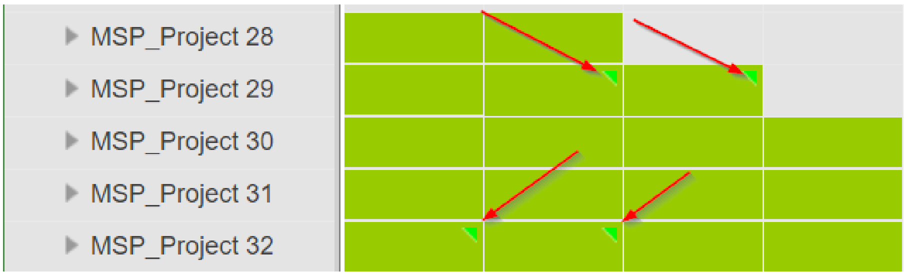
- To delete comments or to add a new one, open the comments window via right-click in the cell > *Display comments*.
  - To delete a comment, select it and click *Delete* (1).
  - If none of the existing comments is selected, you can add a new one directly. Otherwise, click *New* (2) first.



➤ You can delete a comment only if you are the author. Comments entered by other users are read-only.

It is not possible to edit comments. If you want to make changes, delete the comment and enter a new one.

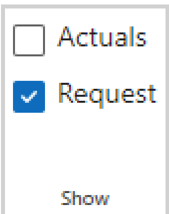
- Highlighted cells will be Rolled up to higher levels, so that you can see on Resource or Project level are Details which are possibly collapsed shown as a green triangle.



3.12 Committing projects

When the data for absences and line operations are entered and the projects are imported, you can start the commitment process.

➤ If the *Request* and *Commitments* rows are not shown, select *Request* in the *Show* group of the menu bar:



The first line of the plan shows the remaining availability of the team for project work.

The *Projects* row shows the overall status of all project commitments. After the first project import, this row as well as the individual project rows are shown in red because the requests have not yet been committed to.

This section explains how to

- commit resources for an entire project at once 64
- commit personal resources 66
- add resources 68 to the project team
- commit personal resources to the work of generic resources 72
- avoid resource conflicts 75

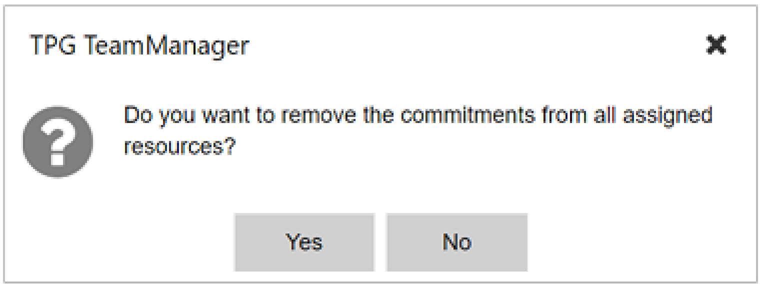
3.12.1 Auto Committing an entire project

For projects with highest priority, you may want to commit all resources as requested. You can do so with one click. The function is also useful to copy a big amount of request data to the *Commitments* row and then edit the commitments.

- Go to the project and select the checkbox in the *Auto* column.
  The cells in the project row will turn green.
  When *Auto* is selected and you update the project, all request data for this project will automatically be copied to the *Commitments* row.

Name	Auto	2024				2024			
		MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
Project B1	✔								
Requests			136.00	112.00	48.00	64.00	56.00	24.00	24.00
Commitments			136.00	112.00	48.00	64.00	56.00	24.00	24.00

- If you want to undo this action and withdraw all commitments for the project, deselect the *Auto* checkbox and click *Yes* in the query that appears.
- If you want to keep the commitments made but stop automatic commitments for the future, deselect the *Auto* checkbox and click *No* in the query that appears.

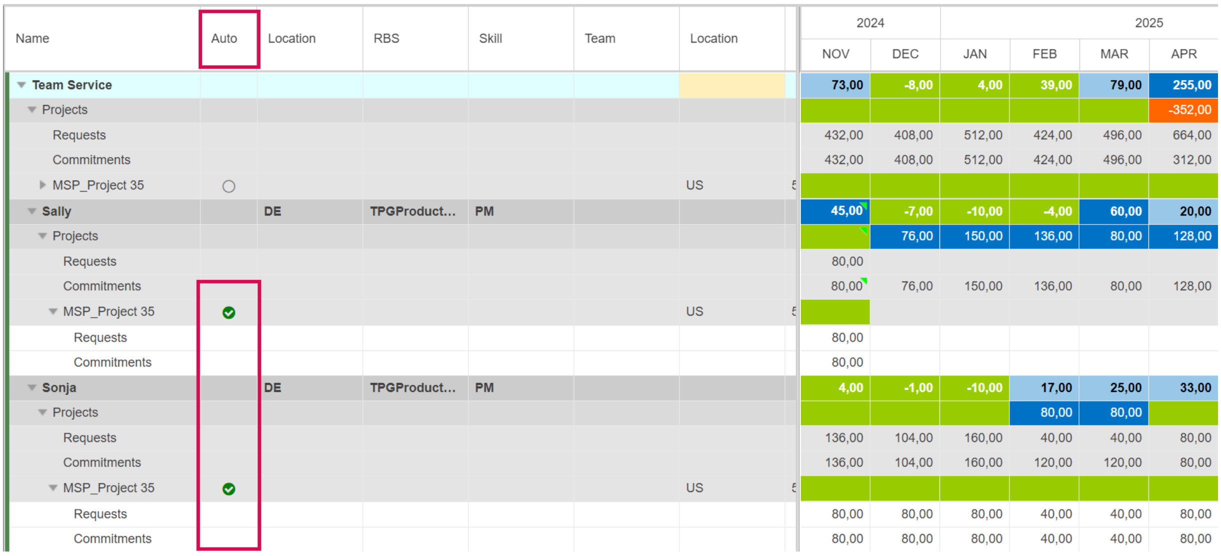


➤ If the Auto checkbox is set and the Project or Assignments of your Team are deleted in the Enterprise Tables on the data base either because the Assignements of your Team are deleted or the entire Project is deleted, then the Project will be deleted on your Team as well **including existing Commitments!**

3.12.2 Auto Committing a single Resource Assignment

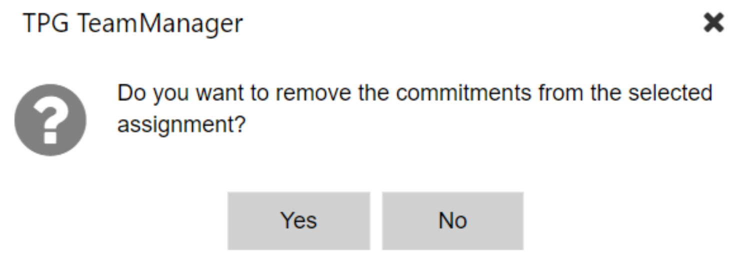
For Resource Assignments with highest priority, you may want to commit all as requested. You can do so with one click. The function is also useful to copy a big amount of request data to the *Commitments* row and then edit the commitments.

- Go to the Resource Project Assignment and select the checkbox in the *Auto* column.
  The cells in the project Assignment row will turn green.
  When *Auto* is selected and you update the project, all request data for this Resource will automatically be copied to the *Commitments* row.



Name	Auto	Location	RBS	Skill	Team	Location	2024		2025			
							NOV	DEC	JAN	FEB	MAR	APR
Team Service							73,00	-8,00	4,00	39,00	79,00	255,00
Projects												-352,00
Requests							432,00	408,00	512,00	424,00	496,00	664,00
Commitments							432,00	408,00	512,00	424,00	496,00	312,00
MSP_Project 35	○					US						
Sally		DE	TPGProduct...	PM			45,00	-7,00	-10,00	-4,00	60,00	20,00
Projects								76,00	150,00	136,00	80,00	128,00
Requests							80,00					
Commitments							80,00	76,00	150,00	136,00	80,00	128,00
MSP_Project 35	✔					US						
Requests							80,00					
Commitments							80,00					
Sonja		DE	TPGProduct...	PM			4,00	-1,00	-10,00	17,00	25,00	33,00
Projects										80,00	80,00	
Requests							136,00	104,00	160,00	40,00	40,00	80,00
Commitments							136,00	104,00	160,00	120,00	120,00	80,00
MSP_Project 35	✔					US						
Requests							80,00	80,00	80,00	40,00	40,00	80,00
Commitments							80,00	80,00	80,00	40,00	40,00	80,00

- If you want to undo this action and withdraw all commitments for the project, deselect the *Auto* checkbox and click *Yes* in the query that appears.
- If you want to keep the commitments made but stop automatic commitments for the future, deselect the *Auto* checkbox and click *No* in the query that appears.



➤ If the Auto checkbox is set and the Project or Assignments of your Team are deleted in the Enterprise Tables on the data base either because the Assignments of your Team are deleted or the entire Project is deleted, then the Project will be deleted on your Team as well **including existing Commitments!**

3.12.3 Committing personal resources

Commitments for individual resources can be made in the main table or in the details table.

➤ In the main table, you see the remaining availability of each resource in the respective name row. This helps avoiding a work overload.

The details table provides a compact overview of requests for the resources assigned to the selected project.

- In the main table, go to a resource and expand a project.
- Alternatively, select a project in the main table and select *Details* in the *Views* group of the menu bar.
  - Expand one of the resources shown in the details table.
- Enter the work that you provide for the project in the *Commitments* row of the resource.
  You can enter the numbers manually or copy a selected cell (Ctrl + C) and paste it in the Commitments row (Ctrl + V).

Colors in the parent row will show how far the request is fulfilled:

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

The example below shows part of the details table for Project A.

- June, July and August of the generic resource are red because no commitments have been made.
- May and June of Sam are green because the requests have been fulfilled at 100%.
- May of Sean is yellow because the commitment is 4 hours (>10%) less than requested.
- June of Sean is green because the missing 2 hours (< 10%) are in the range of the threshold for the green indicator.

Team Service > Projects > Project A Sum: 0

Name	Comment	2024			
		MAY	JUN	JUL	AUG
_Gen Services			-60,00	-90,00	-80,00
Requests			60,00	90,00	80,00
Commitments					
Sam					
Requests		50,00	30,00		
Commitments		50,00	30,00		
Sean		-4,00	-2,00		
Requests		40,00	50,00		
Commitments		36,00	48,00		

In the main table, the row of a project will be marked green when all resource requests for the project are fulfilled at more than 90% .

When the commitments are made for the personal resources in the example above, the project row will look like this:

Name	'4			2024				
	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV
Commitments		140,00	170,00	10,00				
Project A		-4,00	-62,00	-90,00	-80,00			
Requests	140,00	90,00	140,00	90,00	96,00	16,00	20,00	20,00
Commitments	140,00	86,00	78,00		16,00	16,00	20,00	20,00

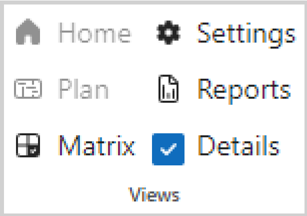
3.12.4 Adding resources to projects

When the request for a member of a project team exceeds their remaining availability 75 or when a project was planned with generic resources 72, it can be necessary to add personal resources to a project.

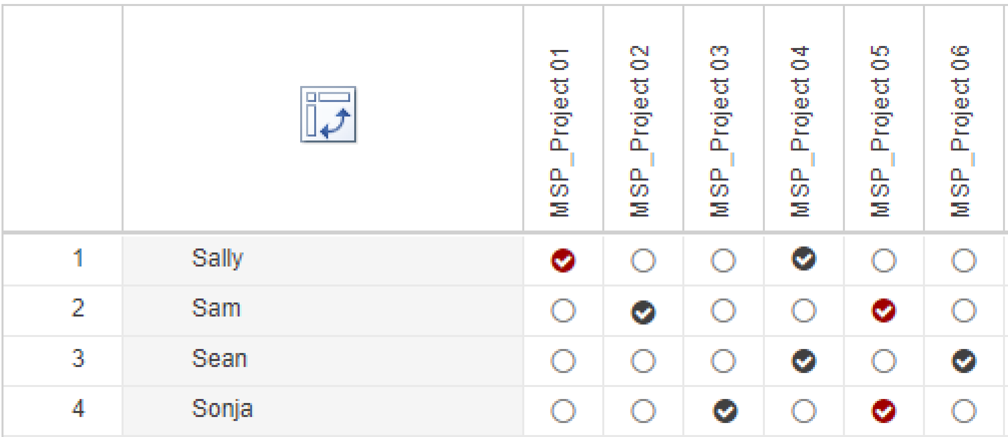
There are two options to do this:

Option 1: In the *Matrix* view

- Click *Matrix* in the *Views* group of the menu bar.

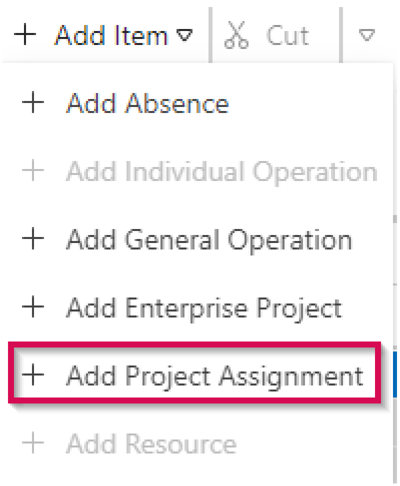


- Select the appropriate checkbox to assign a resource to a project.
  The checkmark will have a black background. The background will turn red when commitments are made for the resource.

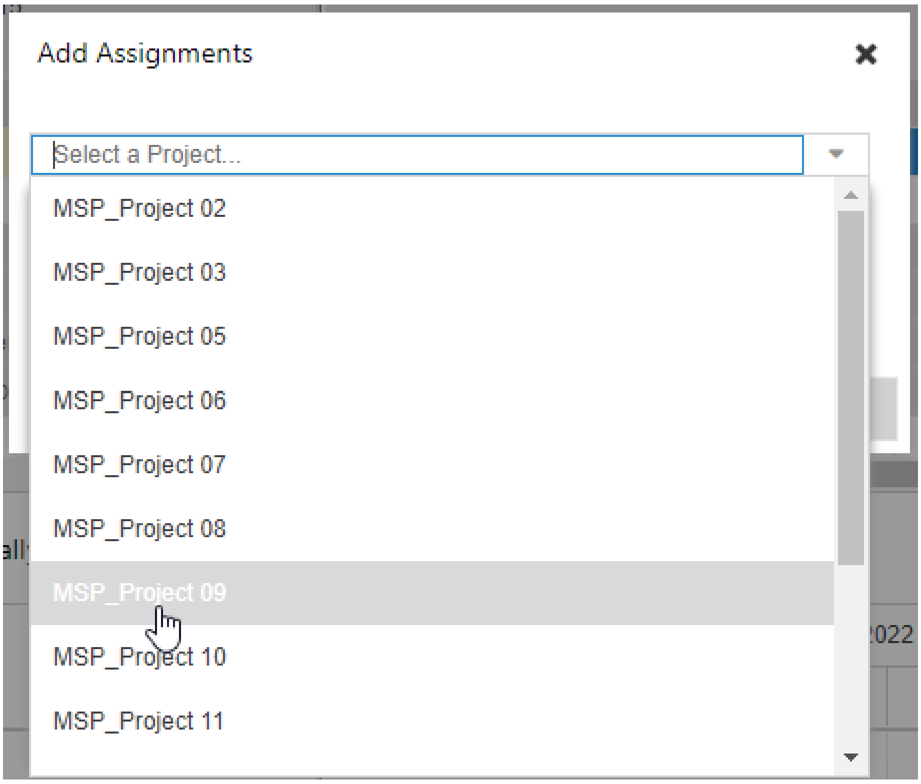


Option 2: In the main table

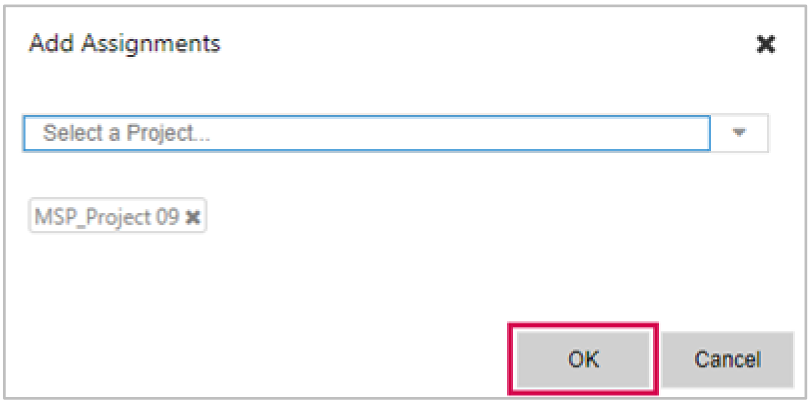
- Select the name of a resource in the main table.
- On the menu bar, click the arrow next to *Add item* and select *Add Project Assignment*.



- Select the project to which you want to assign the resource from the drop-down menu. If you want to assign the resource to several projects at once, select further projects.



- Click *OK*.


Add Assignments
Select a Project...
MSP_Project 09
OK
Cancel

3.12.5 Replacing generic resources

For a rough planning, requests for generic resources can be approved in the *Commitments* row like requests for personal resources.
For a detailed planning, you will select a personal resource from your team who has sufficient availability and the skills required for the work assigned to the generic resource.
The personal resource can be a person already assigned to the project. Alternatively, you can assign another person to the project.

➤ You cannot replace a generic resource directly with a personal resource. Instead, you commit a personal resource for the work assigned to the generic resource. The replacement will be done by the project manager when synchronizing the project in their scheduling tool.

For example, in Project A, a generic resource is assigned to a task in June, July and August.

Sam, Sean and Sonja are members of the project team.

– In June, none of the project team members has enough availability to do the work of the generic resource (60h).
– In July, Sean is available for 139 hours and thus can do the work of the generic resource (90h).
– In August, Sam is available for 87 hours and thus can do the work of the generic resource (80h).

Name	2024			
	MAY	JUN	JUL	AUG
Projects	-600,00	-238,00	-90,00	-80,00
_Gen Services				
Projects	-712,00	-532,00	-242,00	-240,00
Requests	712,00	532,00	242,00	240,00
Commitments				
Project A		-60,00	-90,00	-80,00
Sally	163,00	115,00	131,00	147,00
Sam	73,00	23,00	55,00	87,00
Sean	-3,00	1,00	139,00	27,00
Sonja	59,00	31,00	3,00	-9,00

- For July and August, enter the respective number of hours in the *Commitments* row of Sean and Sam (here: in the details table).
  The fields in the name rows of Sean and Sam are blue because the commitment exceeds the request for these resources, in this case at 100%.

Name	2024			
	MAY	JUN	JUL	AUG
_Gen Services		-60,00	-90,00	-80,00
Requests		60,00	90,00	80,00
Commitments				
Sam				80,00
Requests	50,00	30,00		
Commitments	50,00	30,00		80,00
Sean	-4,00	-2,00	90,00	
Requests	40,00	50,00		
Commitments	36,00	48,00	90,00	

The red fields in July and August and the blue fields will turn green when:

- The project manager has synchronized the data and replaced the generic resource with Sam and Sean

and

- You then reimport the projects by clicking the *Projects* button in the *Import* group of the menu bar.

At the team level in the main table, July and August of Project A will turn green immediately because resources have been committed for all requested work.

Name	2024 MAY	JUN	JUL	AUG
Team Service	**292,00**	**170,00**	**238,00**	**172,00**
Projects	-600,00	-238,00		
Requests	946,00	628,00	322,00	336,00
Commitments	346,00	390,00	322,00	336,00
Project A	-4,00	-62,00		

To fulfill the request for June, you can

- divide the work of the generic resource between Sam and Sonja

or

- add Sally to the project and commit her for the requested work

or

- add Sally to the project and divide the requested work between Sally and Sam or Sonja.

See Avoiding resource conflicts 75.

3.12.6 Avoiding resource conflicts

You will encounter the situation that a resource will be overloaded if you commit them to a project as requested. Depending on the skills and the availability of the individual resources, you can use one or a combination of the following options:

- Commit another resource of the project team to the task
- Assign another resource to the project and commit them to the task
- Divide work between resources
- Discuss with the project manager if a task can be shifted to another time phase

For example, in Project A, a generic resource is assigned to 60 hours work in June.
The remaining availability of the personal resources is as in the figure below. Sam, Sean and Sonja are members of the project team while Sally is not assigned to this project.

Name	2024	
	MAY	JUN
Project A	-4,00	-62,00
_Gen Services		
Projects	-712,00	-532,00
Requests	712,00	532,00
Commitments		
Project A		-60,00
Requests		60,00
Commitments		
Sally	163,00	115,00
Sam	73,00	23,00
Sean	-3,00	1,00
Sonja	59,00	31,00

None of the members of the project team is available for 60 hours. If tasks cannot be shifted to another time phase, you have the following options:

Option 1: Divide work among the actual members of the project team

In the example above, Sean has only 1 hour availability left. Therefore, it does not make sense to assign him to part of the task.

Sam is available for 23 hours and Sonja for 31 hours. The sum of 54 hours is less than requested, but as an overload within the threshold is regarded acceptable, you can commit Sam for 25 hours and Sonja for 35 hours.

After the commitment, the resource utilization cells of Sam and Sonja and the project cell at team level are green:

Name	2024	
	MAY	JUN
Team Service	292,00	110,00
Capacity	704,00	672,00
Projects	-600,00	-178,00
Requests	946,00	628,00
Commitments	346,00	450,00
Project A	-4,00	-2,00
_Gen Services		
Sally	163,00	115.00
Sam	73,00	-2.00
Sean	-3,00	1,00
Sonja	59,00	-4.00

Option 2: Enlarge the project team

Alternatively, you can add Sally to the project. She has sufficient availability to work on the task for the requested 60 hours.

After committing Sally for 60 hours, none of the resources has an overload and the project cell at team level is green.

Name	2024	
	MAY	JUN
Team Service	292,00	110,00
Capacity	704,00	672,00
Projects	-600,00	-178,00
Requests	946,00	628,00
Commitments	346,00	450,00
Project A	-4,00	-2,00
_Gen Services		
Sally	163,00	55,00
Sam	73,00	23,00
Sean	-3,00	1,00
Sonja	59,00	31,00

Depending on the task, you can also divide the work between Sally and Sam or Sonja.