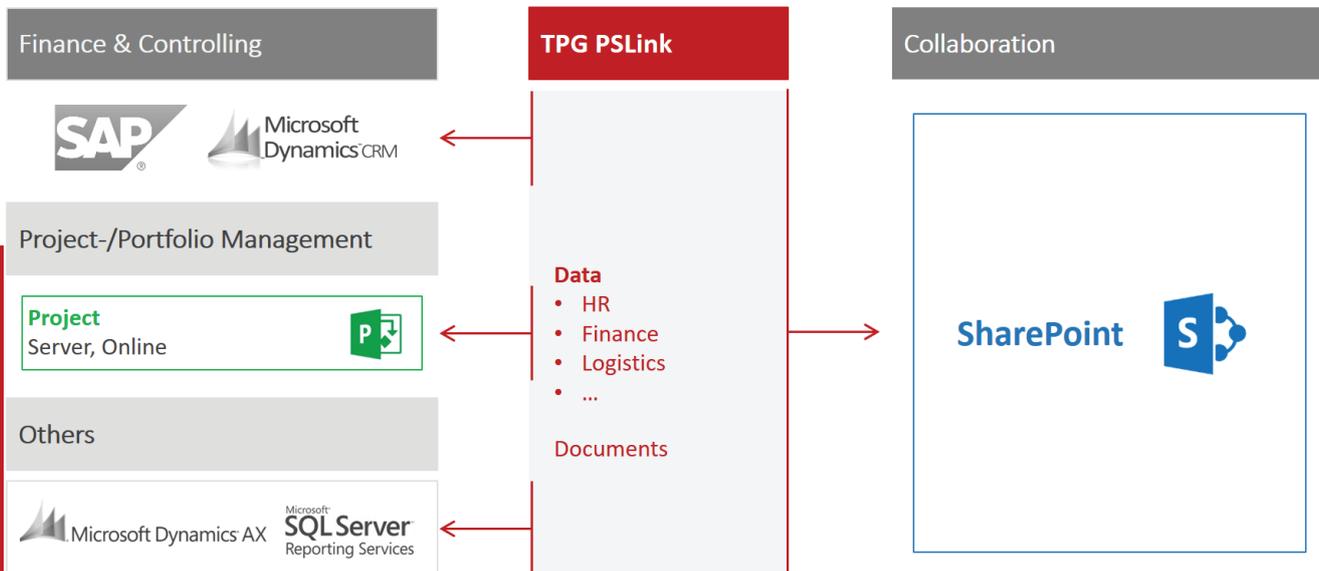


SharePoint Integration

Multi-directional data sharing between SharePoint and PM/ERP-Systems



COMPATIBILITY: Microsoft SharePoint Online, Microsoft SharePoint 2010 - 2016

Companies have a major need to integrate SharePoint with project management solutions like Microsoft Project Server (PPM), as well as with ERP systems like SAP, in order to share data between them. In the first case, they usually need to synchronize project information with SharePoint lists or documents. In the second – ERP integration – they want to share master data, structures and cost or budget information. The following 4 use cases explain the customer needs – there are likely to be further use cases.

USE CASE 1:

Managing and sharing master data in SharePoint

- ▶ One of the most frequent use cases is simple master data management in SharePoint. Examples from various customer projects include: Relevant countries, Locations, Business units, People responsible, customer-related data for use in projects, Programs for selection within projects, any reasonable category definition.
- ▶ Many companies also manage mapping tables with values from different systems (e.g. cost categories from SAP with cost resources from Microsoft PPM).
- ▶ In some cases, SharePoint can act as a “stopover”. Here, users can edit and add master data (e.g. project opportunities from Microsoft CRM or resources from Microsoft Dynamics AX) and update the data in other systems (This could be Microsoft Project Server, for example).
- ▶ Using TPG PSLink Microsoft SharePoint Connector, this type of list can be read from the source systems and transferred to the target systems (e.g. lookup tables for Microsoft Project Server fields).

- ▶ This also has a considerable advantage from the permissions perspective. The existing permissions for the relevant SharePoint sites and lists are sufficient, so there is no need to grant admin rights in the PPM or ERP system.

USE CASE 2:

Tracking the status of work packages in SharePoint

- ▶ The completion of work packages is one thing, and timesheet reporting by project team members on them is quite another. The latter shows the hours people worked and helps to calculate internal costs. However, the posted hours do not necessarily show the completion status of a work package.
- ▶ Instead, the person responsible for the work package has to report separately on its completion status and provide other progress information.
- ▶ This can be resolved by the TPG PSLink Microsoft SharePoint Connector, which can make work package information available in SharePoint. The data people enter there can then be imported into the PPM tool or the ERP system.

KEY BENEFITS OF SHAREPOINT INTEGRATION USING TPG PSLINK

- ▶ Seamless integration of SharePoint with the overall PPM solution
- ▶ Interlinking of all types of list (in the sense of project or task details) via SharePoint
- ▶ Add/assign documents from other sources
- ▶ Easier master data administration
- ▶ Better allocation of permissions for “simple” admin jobs
- ▶ Eliminate multiple data entries
- ▶ Collate information for reports

USE CASE 3:

Maintain and link checklists in SharePoint

- ▶ Many projects are carried out based on stage-gate models, resulting in gates that need to be verified using checklists. Users must be able to check off all the relevant gate’s checklist points before they can move on to the next phase or the next step within a phase.
- ▶ However, these checklists are not part of the project plan. Although they are linked to the project plan milestones, they are still seen as separate lists.
- ▶ This can be resolved using TPG PSLink Microsoft SharePoint Connector, which delivers the following capabilities: Using SharePoint templates, checklists for a project in the PPM or ERP system can be created and assigned automatically.

- ▶ They are updated with information from the project plan (e.g. milestone deadlines) Checklist updates are synchronized with project milestones and phase-related fields in the PPM or ERP system (e.g. phase milestone marked as completed, change of status)

USE CASE 4:

Consolidating data from SharePoint lists for SSRS reports

- ▶ Project-related data that goes beyond the actual schedules is often stored on a variety of thematic SharePoint sites. It is important to be able to collate this data to facilitate the production of an overview report.
- ▶ The TPG PSLink Microsoft SharePoint Connector can collect and save this type of information in SQL tables, on demand and/or at specific times.

Extensive configuration options and checking mechanisms

TPG PSLink ensures full consistency of the data transferred between all the systems involved.

SharePoint Objekte	Datenaustausch
Lists	- Create, read, update, delete - update selection for SharePoint fields
Documents	- Up- and download of documents - document meta data



SAP® Certified
Integration with SAP Applications

EINIGE TPG PSLINK REFERENZEN

Airbus, GER/FRA
BAE Systems, GBR
Bosch (BSH), GER
DESY, GER
Dimension Data, MEA
Dürr, GER
ELM, MEA
E.ON, GER
Exxaro Coal Mines, MEA
Goodyear, GER/USA

Grupo Leao, BRA
Hamburg Port Authority, GER
Harman International, GER/USA
Helsinki City Transport, FIN
Hydro Quebec, CAN
Irish Rail, IRL
Johnson Controls, GER
Karl Storz, GER
Kemira, FIN
KFW, GER

Lonza, GBR
MAN Diesel & Turbo, GER
NATS, GBR
QinetiQ, GBR
Rentschler Biotechnologie, GER
Rheinmetall, GER/CHE/CAN
Siemens Energy, GER
Siemens Mobility, CHE
Stora Enso, FIN
Swisscom, CHE

Tecnisa, BRA
Tyco Electronics, USA
Vaillant Group, GER
Vorwerk, GER
Votorantim, BRA

“Using TPG PSLink, we have been able to reduce the time needed for our regular budget planning from three man-weeks to one man-day. The system delivers additional savings by avoiding the need to fill in timesheets twice, in MS Project and SAP. The bidirectional integration saves us more than 1 man-year of time and effort annually.”

HELMUT KÖLBL, HARMAN INTERNATIONAL

BUSINESS SCENARIOS

TPG PSLink® and TPG ResourceLink are connectivity products that are essential for designing and implementing company-wide project and portfolio management based on Microsoft Project, SharePoint, SAP, Dynamics and JIRA. They combine portfolios, projects, finance and human resources in a well-integrated solution that increases your project management efficiency.

IMPORTANT INTEGRATION USE CASES USING THE EXAMPLE OF SAP

- ▶ Resource master data, such as personnel numbers or cost centers, are an important basis for most use cases. TPG ResourceLink ensures that the resource pool is always synchronized with SAP.
- ▶ Structures can be partly or fully synchronized with SAP in both directions. Structures can be filtered using any criteria, such as the relationship with Microsoft Project tasks or outline code field definitions.
- ▶ TPG PSLink® covers a wide range of SAP network-based use cases. For example, Microsoft Project tasks can be mapped with SAP network activities, either directly or using configurable consolidation logic. The synchronization can also include the other direction, such as

▶ Sharing data with PM orders works in a similar way, enabling the integration of projects for machine maintenance, production stoppage and plant inspection. Staff can perform scheduling and resource planning and monitor the project's progress – all within Microsoft Project.

▶ A key feature in TPG PSLink® is the exchange of internal and external costs with any SAP cost object. Planned values for work and primary costs can be aggregated to any cost accounting parameter, such as WBS element, internal order, cost center, and cost and activity type. With this SAP-compliant aggregation, the values can be transferred into SAP activity input and primary cost planning, always in relation to the relevant period of the fiscal year. This is the ideal way to keep SAP and Microsoft Project cost plans synchronized and avoid unnecessary details in SAP.

▶ Along with forecasts, TPG PSLink® can transfer posted time from Microsoft Project to SAP CATS or to CO activity allocation documents. It can also import in the other direction – from SAP into Microsoft Project.

▶ TPG PSLink® also supports the exchange of data between SAP and Microsoft SharePoint.

▶ TPG PSLink® provides the flexibility to transfer any data to or from any SAP module by configuring update

TPG PSLink® is a worldwide leading middleware product for data exchange between PPM, ERP and other systems. The extensive checking mechanisms of the SAP-certified product ensure the complete consistency of data shared between the systems. The product is very flexible for use in a range of different scenarios. Extensive configuration options offer you a rapid and flexible implementation.

„With Project Server linked to SAP, we can gauge the financial success of projects, comparing actual with budgeted figures, and provide management with the ability to exert meaningful control.“

JANI SAARINEN, KEMIRA

EINIGE TPG PSLINK REFERENZEN

Airbus, GER/FRA
BAE Systems, GBR
Bosch (BSH), GER
DESY, GER
Dimension Data, MEA
Dürr, GER
ELM, MEA
E.ON, GER
Exxaro Coal Mines, MEA
Goodyear, GER/USA

Grupo Leao, BRA
Hamburg Port Authority, GER
Harman International, GER/USA
Helsinki City Transport, FIN
Hydro Quebec, CAN
Irish Rail, IRL
Johnson Controls, GER
Karl Storz, GER
Kemira, FIN
KFW, GER

Lonza, GBR
MAN Diesel & Turbo, GER
NATS, GBR
QinetiQ, GBR
Rentschler Biotechnologie, GER
Rheinmetall, GER/CHE/CAN
Siemens Energy, GER
Siemens Mobility, CHE
Stora Enso, FIN
Swisscom, CHE

Tecnisa, BRA
Tyco Electronics, USA
Vaillant Group, GER
Vorwerk, GER
Votorantim, BRA