TPG PSLink®

A Leading Product for Integrating Systems in Project Environments

TPG PSLink® is a leading global middleware product for data exchange between systems for project management, collaboration, and work management, and ERP systems. It combines portfolios, projects, finance and human resources in a seamlessly integrated solution that enhances your project management efficiency. The extensive verification mechanisms ensure the complete consistency of data shared between the systems. The SAP-certified product is extremely flexible in its configurability, and the integration can be implemented quickly.

THREE TYPES OF INTEGRATION

- **Function integration**: merges several different collaborative applications into one
- **Data integration**: all participating applications access the same data
- **Business process integration**: business processes (e.g. reference models, business frameworks, process frameworks) are standardized

THE BENEFITS

- Integrated project planning, controlling, collaboration and document management
- No more dual data entry
- Simplify multiple project tasks with streamlined, end-to-end project management processes
- Improve data quality with an automatic sync feature and a verification mechanism

FEATURES AT A GLANCE

- Fast implementation for standard use cases
- Highly configurable product for complex cases
- Middleware with web client and MS Project add-in
- Bidirectional data exchange
- Extensive test mechanisms for ultimate reliability

Integration with Microsoft Project Server security system
- Also used as a standalone without Microsoft PPM
- Flexible synchronization with job queue administration
- Any number of systems, tenants, Project Server sites
- Proven solution since 1998 with multiple international customer references

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ERP System Integration – using SAP

The integration of ERP systems such as SAP with Microsoft Project, SharePoint, and other systems is essential for the efficient use and acceptance of a project management solution. It ensures that the affected staff, such as project managers and accountants, can use the tool best suited to their job role.

USE CASE 1: TRANSFERRING THE PROJECT STRUCTURE FROM TO MICROSOFT PPM TO SAP PS

Synchronizing the top level of a project plan with SAP has advantages for both sides. It gives the finance department a good, accurate overview while giving the project manager broad freedom in planning the details in Microsoft PPM. It’s possible to transfer the mixed structure from PPM to SAP.

<table>
<thead>
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<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
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<td>Task 8</td>
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</tr>
</tbody>
</table>

USE CASE 2: TRANSFERRING WORK AND COST PLANNING FROM TO MICROSOFT PPM TO SAP

Many companies require budgets to be planned and updated monthly. It’s therefore very helpful when all it takes to transfer the project data to the correct structures is a simple click. The integration of Microsoft PPM with SAP delivers a high ROI and promotes user acceptance of the integration.

<table>
<thead>
<tr>
<th>Name</th>
<th>Project</th>
<th>WBS No.</th>
<th>Resources</th>
<th>Jan</th>
<th>Feb</th>
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<td>TPG001</td>
<td>CON</td>
<td>176</td>
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<td>Carina</td>
<td>Work</td>
<td>TPG001</td>
<td>CON</td>
<td>160</td>
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</table>

Use case 2: Transfer of the work and cost forecasts from Microsoft PPM to SAP
USE CASE 3: TRANSFERRING ACTUAL WORK FROM TO MICROSOFT PPM ZU SAP

In many companies, the actual hours worked on projects must be billed either internally or externally. To do this, they need to transfer this information from the PPM system to SAP at the end of each billing period. In SAP, this information is then further allocated. One of the integration’s biggest advantages is its fast and error-free data transfer.

**Use Case 3: Transfer of the actual hours from Microsoft PPM for allocation in SAP**

USE CASE 4: TRANSFERRING ACTUAL COSTS FROM SAP TO MICROSOFT PPM

If project managers are also required to manage their project’s costs, they will be happy to hear that the actual costs are automatically transferred directly from SAP to their project. This integration significantly accelerates and simplifies the communication process. It also ensures that project managers always have the latest cost information, which they urgently need to manage their projects.

**Use Case 4: Transfer of invoice data from SAP to the Microsoft PPM system**

"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."  

Helmut Köbl, Harman International

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# Integration JIRA or TFS / DevOps with PPM and ERP Systems

Many companies have a strong need to share data between Jira or TFS / DevOps and tools for project management like Microsoft Project Server / Project Online (PPM) and ERP systems like SAP. The following use cases illustrate this, but many others are possible as well.

## Use Case 1: Integration JIRA or TFS / DevOps with Microsoft PPM

<table>
<thead>
<tr>
<th>Project X</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
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<tbody>
<tr>
<td>Work package 1</td>
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<td>Work package 7</td>
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<td>Work package 9</td>
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<tr>
<td>Work package 10</td>
<td></td>
<td></td>
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</tbody>
</table>

### Phases as Versions

- **Phase A**
  - Work package 1
  - Work package 2
  - Work package 3
  - Work package 4
  - Work package 5

- **Phase B**
  - Work package 6
  - Work package 7
  - Work package 8
  - Work package 9
  - Work package 10

Use Case 1: Transferring the structure from Microsoft PPM to Jira and actual data from Jira to Microsoft PPM

In this scenario, the portfolio and project management activities are carried out in Microsoft PPM. The projects are planned down to the level of work packages. Using TPG PSLink, work packages can be transferred to Jira and automatically structured into versions, epics and/or issues. The head of development, the scrum master and the product owner are now able to plan in more detail based on the imported structure. They can use all the Jira tools including workflows, scrum boards, and work logs (for time reporting) for detailed planning and progress monitoring. (For additional use cases, see: [https://www.theprojectgroup.com/en/middleware/jira-integration](https://www.theprojectgroup.com/en/middleware/jira-integration))

## Use Case 2: Integration JIRA or TFS / DevOps with SAP

If portfolio and project management is carried out in an ERP system such as SAP, the integration scenario will be similar to that described in Use Case 1 above. In other words, the rough planning is done in SAP PS or PPM, and Jira is used for detailed planning and the execution of the work packages. Another important aspect is the synchronization of the booked hours. The work logs (timesheets) are hereby transferred from Jira to SAP CATS or to SAP for cost allocation.

## Use Case 3: Integration JIRA or TFS / DevOps, SAP, SharePoint, Microsoft PPM

In most cases, the integration will cover several different systems. It often includes the use of:

- SAP for budget planning and cost allocation
- Microsoft PPM and SharePoint for portfolio and project management as well as for centralized time tracking
- Jira for sprint planning, task management, issue tracking, workflow management, and status monitoring

The integration enables the following data-sharing processes:

- SAP <> Microsoft PPM / SharePoint: structures, costs, budgets
- Microsoft PPM / SharePoint <> Jira: work packages to versions / epics / issues
- SAP <> Microsoft PPM <> Jira: booking of Jira work logs and Microsoft Project reports to SAP CATS or to SAP for cost allocation

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Integration SharePoint with SAP and other Systems

There’s a strong need to integrate SharePoint with SAP or other ERP systems as well as Microsoft Project Server / Project Online in order to share data between them. TPG PSLink can be very flexibly configured, making it quick to implement and enabling it to deliver the necessary data to the relevant systems or structures:

- **ERP integration**: sharing master data, structures and cost or budget information
- **Projects**: synchronizing project information with SharePoint lists or documents.

The following four use cases explain the customer needs – and further use cases are likely.

**USE CASE 1: MASTER DATA IN SHAREPOINT AND SHARING THEM WITH OTHER SYSTEMS**

<table>
<thead>
<tr>
<th>Microsoft SharePoint</th>
<th>TPG PSLink</th>
<th>Jira</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
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<td>Work package 1</td>
<td>Issue 02</td>
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<td>Phase B</td>
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<td>Issue 12</td>
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</table>

Use case 1: Transferring SharePoint lists as templates saves time (here using Jira as an example)

One of the most frequent use cases is simple master data management in SharePoint. Examples from various customer projects include:

- Relevant countries
- Business units
- People responsible
- Customer-related data for use in projects
- Programs for selection within projects
- All types of categories

Many companies also maintain mapping tables with values from different systems (e.g. cost categories from SAP along with cost resources from Microsoft PPM).

In some cases, SharePoint can act as an intermediate stop at which users can edit and supplement the master data (e.g. project opportunities from Microsoft CRM or resources from Microsoft Dynamics AX) as well as update the data in other systems (e.g. Microsoft Project Server).

Using TPG PSLink Microsoft SharePoint Connector, this type of list can be extracted from the source systems and transferred to the target systems (e.g. lookup tables for Microsoft Project Server fields). This strategy also has a considerable advantage in that 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 is quite another. The latter shows the hours people worked and is used to calculate the internal costs. However, the posted hours do not necessarily indicate the completion status of a work package. Instead, the person responsible for the work package must separately report its completion status and provide other progress information.

This SharePoint Connector makes the work package data available in SharePoint. The data maintained there can then be imported into the PPM tool or the ERP system. This provides a distinct advantage with regard to the permissions. Permissions for the affected SharePoint sites and lists are sufficient, which eliminates the need for admin rights in the PPM and ERM systems.

USE CASE 3: LINKING SHAREPOINT CHECKLISTS TO OTHER SYSTEMS

Many projects are carried out based on clearly defined phase models which include stage gates that need to be verified using checklists. Users must fulfill all the relevant gate’s checklist items 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 schedule plan. Although they are linked to the project plan’s milestones, they are still seen as separate lists.

This can be resolved using TPG PSLink Microsoft SharePoint Connector, which lets you:

- Use SharePoint templates to create and automatically assign checklists to a project in the PPM or ERP system
- Update these with information from the project plan (e.g. milestone deadlines)
- Synchronize the updated checklist items with project milestones and phase-related fields in the PPM or ERP system (e.g. completed phase milestone, change of status, etc.). This process is also interesting with regard to the permissions of the people providing checklist feedback.

USE CASE 4: CONSOLIDATING VARIOUS SHAREPOINT LISTS IN SQL FOR REPORTS

Project-related data that goes beyond the actual schedules is often stored in a variety of thematic SharePoint sites. The ability to consolidate this data into overview reports is essential. The SharePoint Connector can collect and save this type of information in SQL tables, on demand and/or at specific times. This reduces the reporting effort to a minimum.

SOME REFERENCES FOR TPG PSLINK

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
Lanza, GBR
MAN Diesel & Turbo, GER
NATS, GBR
QinetiQ, GBR
Rentschler Biotechnologie, GER
Rheinmetall, GER/CHE/CA
Siemens, GBR
Siemens Mobility, CHE
Stora Enso, FIN
Swisscom, CHE
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Votorantim, BRA
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