TPG Product Catalog 2020

Simplify your work in project, program, portfolio and resource management with Microsoft Technology
TPG® The Project Group

Competent Consulting and Intelligent Solutions for a Higher PM Maturity Level

TPG The Project Group is an international full-service provider of consulting and solutions for enterprise-wide project management. The company focuses on Microsoft technologies and their integration with SAP and other enterprise systems. A Microsoft Gold Certified Partner, TPG provides international companies with expert advice, flexible implementation, intelligent PM solutions, and a higher PM maturity level that make a real contribution to business performance. The company complements its offerings with seminars on Microsoft Project and project management methodologies.

Subsidiaries and Partner in an International Environment
With several subsidiaries in Europe, the USA and the MEA region as well as a global network of authorized partners, TPG provides its services to large and medium-sized companies in all industries that work with project management.

Products for Easy and Efficient Working
Tried-and-tested TPG products extend the capabilities of Microsoft Project, Project Server, Project Online, SharePoint Server and SharePoint Online for many recurring scenarios. They optimally support your roles and processes, facilitating your work and making it more efficient.

PRODUCTS FOR PROJECT MANAGEMENT WITH MICROSOFT TECHNOLOGY

- TPG PSLink®: Middleware for integrating IT systems for PPM, ERP and work management
- TPG ProjectLink: Transparency in multi-project- and program management
- TPG TeamManager: Clearly laid out resource planning and coordination between project and line managers
- TPG CoRePlanner: Project and budget planning in SharePoint
- TPG PortfolioManager: Portfolio planning with optimal resource utilization

For more products and solutions for diverse industries, please visit our website: www.theprojectgroup.com/products

Microsoft Project and Portfolio Management (PPM)

Microsoft PPM is an enterprise-wide solution for project and portfolio management. It is a platform for planning, information, and communication that spans multiple projects and departments. The current version is Microsoft Project Server 2019 or Project Online.

Microsoft PPM / Project Online stands for the components Microsoft Project Professional, Project Server and Project Web App for the browser-based access. Embedded in SharePoint Server with the components Business Intelligence, Reporting, Document Administration, List Administration and Workflows, it provides one work environment for all stakeholders – from management to project managers through to project staff. Project Online is the cloud-based solution of Project Server in the Microsoft 365 environment.
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

www.theprojectgroup.com/pslink
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: TRANSFERING 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.

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.
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 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.
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

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)

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

www.theprojectgroup.com/pslink
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><strong>Version</strong></td>
<td><strong>Epic</strong></td>
<td><strong>Item</strong></td>
</tr>
<tr>
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<td>Work package 1</td>
<td>Issue 01</td>
</tr>
<tr>
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<td>Item 02</td>
</tr>
<tr>
<td>Phase A</td>
<td>Work package B</td>
<td>Item 04</td>
</tr>
</tbody>
</table>

**List items as issues**

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
durr, 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
u.v.m.

www.theprojectgroup.com/pslink
TPG ProjectLink

More Options in Complex Multi-Project or Program Environments

In program management, the sharing of information on deadlines, work, costs, etc. across projects is very important. TPG ProjectLink is a product for Microsoft Project Server and Project Online (PPM). This lets you incorporate the dependencies and responsibilities in a structured manner.

**GOOD OVERVIEW OF IMPORTANT EXTERNAL TASKS**

Project managers use TPG ProjectLink to link external tasks to their own plans in Microsoft Project Server. Users can mirror the tasks (soft link) or link data about existing tasks to their own schedule (hard link). This gives them a quick overview of any changes affecting the external tasks.

TPG ProjectLink does more than just link the tasks of individual projects, however. Multi-project overviews containing information such as the milestones and traffic light status indicators needed to manage the project can be created and updated automatically (bottom-up). With TPG ProjectLink, tasks can be automatically transferred from these overarching framework projects back into the sub-projects (top-down). This information flow forms the basis of consistent and convenient program management.

**THE BENEFITS**

- A flexible tool with variable links across all projects (soft links or hard links)
- Clear, graphical comparison of your plans and any external tasks
- Faster indication of, and reaction to, any changes in external projects
- Multi-project overviews for managing the programs
- Links across companies

**FEATURES AT A GLANCE**

- Project Server Sites, SharePoint lists and SQL data storage as data bases
- Configurable field mapping for many individual use cases
- Task picker makes it easy to configure the links (access rights via Microsoft Project Server)
- Preview option before importing external data
- Update of the linked information for single tasks or the whole project

www.theprojectgroup.com/projectlink
USE CASE 1: MULTI-PROJECT OVERVIEWS WITH MILESTONE ROLLUP

Relevant milestones and tasks from different projects can easily be consolidated into a multi-project overview. This enables you to forward Microsoft Project-format schedules showing selected partial information to specific groups such as external stakeholders. You can also create, and periodically update, various overviews based on any set of criteria.

USE CASE 2: PROGRAM MANAGEMENT „DELIVERY DATES”

Automated bottom-up and top-down linking facilitates the interaction between the program’s projects and sub-projects. The milestone rollup from the program’s sub-projects clearly depicts the most important dates for the program manager. In the same way, you can display program-level targets in the sub-projects. This lets the sub-project managers use the program targets to update their plans. Deviations can be indicated using a bar chart.
USE CASE 3: CROSS-PROJECT LINKS

Project managers can choose which tasks from other project plans they would like to link to their own schedule. Using the task picker, project managers can select tasks from other projects. They can choose from three types of links: hard link, soft link, and mirror link. Depending on the link type they choose, their schedules can be changed from the outside (hard link / mirror link) or the external data is displayed as read-only (soft link).

USE CASE 4: DISTRIBUTED PLANNING IN PROJECT & LINE MANAGEMENT

In the line organization, project managers develop rough plans for the work packages. The detailed planning of the work packages is done by the line managers in their own Microsoft Project plans. In their own plans, the project managers can see the consolidated milestone dates from the detailed plans. So, the project manager’s rough plan and the line manager’s detailed plan each show the other plan’s corresponding status, enabling them to easily identify any discrepancies and discuss these to reach an agreement.

USE CASE 5: PERFORMING AD-HOC QUERIES AT THE TASK LEVEL

Project managers can run any task-level queries they choose, e.g. display all the tasks from various projects within a specific timeframe. This can be done without opening the individual projects, making it easier to keep stakeholders informed.
TPG TeamManager

The Smart Tool for Line Managers to optimize their Resource Planning

TPG TeamManager is a web-based tool that helps managers plan their resources. It shows every team member’s complete workload plan, including absences, line activities, and project work. In matrix organizations, resource managers need the ability to identify free project capacity to enable them to quickly approve any resource requests. TPG TeamManager is a standalone tool that does exactly that and is a SharePoint app that runs in all common browsers.

The planning view for the team leader provides an overview showing utilization of the team’s resources and the requested projects. Ideally, all project and resource fields are green, indicating that all the resources are being optimally utilized and resources have been committed to every project request. The reality is often quite different though, so the team leader is quickly alerted to any areas where action is needed via the yellow and red color-coding. TPG TeamManager provides additional functionality to project managers working with Microsoft PPM. It gives them a way to compare the team leader commitments with the project plans directly in the tool.

CONNECTION TO PROJECTS

TPG TeamManager combines resource requests from projects and the corresponding confirmations from the team leader. The line manager’s confirmations can be transmitted to the project and depicted in report graphics that compare requests to commitments. This gives project managers and team leaders a solid basis for discussing the information and reaching a mutual agreement.

THE BENEFITS

- Helps project and team managers coordinate, and reach agreement on, the resource plans
- Efficient handling of project resource requests and resource allocation in a single tool
- Increased reliability of project resource plans for project managers
- Reduced risk of project delays and overbooked / overloaded resources
- Provides overviews for making decisions on additional resource requirements

FEATURES AT A GLANCE

- Graphical traffic-light view showing the workload of the team and each individual employee
- Graphics depicting the resource requests and commitments with upward aggregation
- Optional integration with Microsoft Project Server in accordance with the permissions model

www.theprojectgroup.com/teammanager
INTEGRATION WITH MICROSOFT PROJECT SERVER / PROJECT ONLINE

It is possible to connect Project Server / Project Online, as a project management platform, to the TPG TeamManager SharePoint App. This enables you to create the following process without configuring an interface:

- The app imports the resource capacities from the Microsoft Project Server Resource Pool.
- Team leaders plan all the non-project related activities and absences for their team in TPG TeamManager.
- They import all the resource requests from Microsoft Project Server into the app at the project level.
- Then, they allocate the available resources to projects or redistribute activities to optimize the team’s workload.
- The project manager reviews the commitments from the different teams using the TPG TeamLink add-in in Microsoft Project Professional or the TPG TeamLink app in SharePoint – as shown here:

TPG TeamManager allows to import project data from other systems (e.g. SAP-PPM or Jira) via CSV-formats. In combination with TPG PSLink, any kind of integration scenario is possible.

www.theprojectgroup.com/teammanager
TPG CoRePlanner

Work and Cost Planning in SharePoint with Many Advantages Over Excel

TPG CoRePlanner is a customized tool for structuring your project and cost plans in accordance with your timeline. Just as in Microsoft Project, you organize your project into tasks and subtasks, allocating work and costs accordingly. Just add work to the timeline (like you would do in Excel). This work is then used to automatically calculate the costs based on the variable cost and exchange rates for the different currencies. You can also enter the costs directly. With a wide range of individual user fields, TPG CoRePlanner is a very flexible planning tool. It runs in any common browser and stores your data in a central database.

THE BENEFITS

- Fast, simple planning of work and costs
- Easy-to-use interface
- Functions like Excel, but with many advantages
- Minimal training needed (1-2 hours)
- Budget planning is based on flexible rates of exchange
- Maximum data integrity due to centralized data storage
- If needed: direct data transfer to ERP systems

FEATURES AT A GLANCE

- Centralized data storage in SQL Server
- Configurable structure for project tasks
- Resource capacity and
- Cost rates are variable over time
- Currency conversion can be variable over time
- As many user-defined fields as required
- Planning in month, quarters and years
- Check-in / check-out function
- Integration as detail page in the Microsoft Project Web App

Image: TPG CoRePlanner: User-definable structure and fields for projects and tasks – as an example, here with SAP WBS

www.theprojectgroup.com/coreplanner
WORK LIKE IN EXCEL – BUT WITH MANY ADVANTAGES

With TPG CoRePlanner, you can work in your preferred browser in a similar way as in Excel. Ease of use: The clear interface and focus on key functions make the product very easy to use.

Another advantage is that your data is stored in a centralized database. That eliminates the hassle of working with several different Excel files. You can also readily involve your finance department by integrating the solution with an ERP system such as SAP.

BUDGET PLANNING WITH RELIABLE DATA

To help you make your budgets more reliable, TPG CoRePlanner provides a time-phased conversion of work into costs. If you are using resources with a different currency to the project currency, the tool calculates the costs accordingly using an exchange rate that can be varied over time. You can even change this on a monthly basis. The data is stored in a central database, which is an important prerequisite for ensuring data quality.

DATA ENHANCEMENT FOR THE FINANCE DEPARTMENT

The user-defined fields enable you to assign planning content and resources to objects – cost centers and types, WBS elements, CO orders, etc. – in an ERP system. Data sets prepared in this way can be sent to and from the ERP system, reliably and conveniently, using integration tools like TPG PSLink. This is a key prerequisite for efficient collaboration between your project managers and financial staff.

ADVANTAGES OVER PROJECT SERVER

- Cost resources (PWA)
- Planning in timeframes (PWA)
- Copying data from Excel (PWA)
- Facilitates work with different currencies
- Multi-column lookup tables
- User-defined fields at assignment level

ADVANTAGES OVER EXCEL

- Centralized data storage
- Centralized custom fields and selection lists
- Facilitates work with different currencies
- Runs in most common browsers
- Robust, no file version problems
**TPG PortfolioManager**

**Optimum Resource Utilization Through Simplified Project Portfolio Planning**

When a great idea finally turns into a real, approved project, the first question is usually: when will we have the resources and budget necessary to start the project? It’s nearly impossible to answer this project and portfolio management question without the help of appropriate software. TPG PortfolioManager is the perfect tool for project portfolio management with Microsoft Project and other planning tools. The software tool allows you to aggregate the resource allocations from new and ongoing projects at the project level and show each of them as a task. An additional comprehensive overview shows each team’s workload and provides a basis for decision-making.

**THE BENEFITS**

- Manual optimization of resource utilization by simple drag and drop
- Graphical simulation of current state of projects and immediate view of impact on the resources involved
- Summary of all project data in an easy-to-read diagram

**FEATURES AT A GLANCE**

- Simultaneous display of consolidated project schedules (one bar per project) along with several consolidated resource histograms
- Various summaries of portfolio resources – by department, by subsidiary, etc.
- Highly configurable graphics (bars and lines)
- Data on existing / new projects is imported directly from the Project Server or other SQL-based source
- Various simulation variants can be saved

Current and new projects are color-coded in the bar charts and histograms. In the view, you can easily eliminate resource overloads by dragging and dropping the project bars until the resource peaks are below the overload level. A simple click is all it takes to activate / deactivate a project or modify the capacities of resources. This enables you to quickly test various resource simulations and save the results of these different variants.
International TPG® Contacts

Competent Consulting and Intelligent Solutions for Your Higher PM Maturity Level

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