

# TPG ProjectLink

## Questions and answers

### FAQ: QUESTIONS AND ANSWERS TO TPG ProjectLink

#### 1 Who needs TPG ProjectLink?

TPG ProjectLink is aimed at all users of Microsoft Project Server or Project Online who recognize that the “out-of-the-box” Microsoft tools (= basic functions) have limitations in a complex multi-project / program environment. The TPG ProjectLink add-on overcomes these limitations and enables important applications in multi-project / program management which could not be implemented with Microsoft’s basic functions or only very uncomfortably.

#### 2 How does TPG ProjectLink work in technical terms?

TPG ProjectLink uses MS Project Server or Project Online as a basis and extends their potentials in multi-project / program management. As an add-on in the MS Project Client, TPG ProjectLink reads the data directly from the Project Server / Online. The source projects are not linked or changed, which is an important difference as compared to the Microsoft basic function. This way, every project manager remains in control of his / her own plan and does not need to fear that his / her plan is changed from the outside in an uncontrolled manner.

### 3 Can TPG ProjectLink be adapted to our processes?

Yes, TPG ProjectLink can be adapted very well to your processes. It is not necessary to change your processes according to the new multi-project / program solution. This increases the acceptance of the solution.

### 4 Why do we need an add-on for Project Server / Project Online for program management?

In their basic function, Microsoft Project Server and Project Online have the following important technological restrictions:

- » You need write access to both projects concerned to set up a cross-project link.
- » Links can only be realized through dependency (= predecessor / successor relationship) between 2 tasks.
- » You do not have a clearly represented preview function enabling you to see how applying temporal changes in the source project will affect your target project. This is inconvenient.
- » Complex program management is very difficult with the basic functions.
- » Project Server / Project Online may exhibit performance problems in case of many linked projects.

### 5 What can TPG ProjectLink do better when linking tasks between projects?

The following reasons speak in favor of TPG ProjectLink in multi-project/program management:

- » You do not need write access to external projects to set up links.
- » The tool only reads the data of the external projects from Project Server / Project Online but never changes the source projects themselves.
- » You do not need to open source projects in order to create new links or receive up-to-date information in the target project. This has a positive effect on system performance.
- » As information is available faster, this will save your project managers and decision-making bodies time.



- » TPG ProjectLink offers several types of links that you can use depending on your requirements:
  - » 1:1 links such as external task information in user-defined fields (Softlink)
  - » a copy of an external task as a separate row (Mirrorlink)
  - » a list of tasks from various external projects (milestone rollups)
- » You will find the necessary source tasks for your project quickly through the selection using the user-friendly TaskPicker. This is a dialog for viewing an external project directly without requiring you to open and insert it in your project plan (which would be complicated).
- » In the Microsoft basic function, deliverables only work in the Project Web Access (PWA). You can also transmit deadline information only. With TPG ProjectLink, you work beyond PWA limitations.
- » Depending on the configuration, you can add any additional information related to the source task to your project.

## 6 Which tasks from other projects can I link in my project as a project manager?

With TPG ProjectLink, you can, in principle, link each task of projects to which you have read access. If necessary, you can also extend this to projects to which you do not have read access according to Project Server permission.

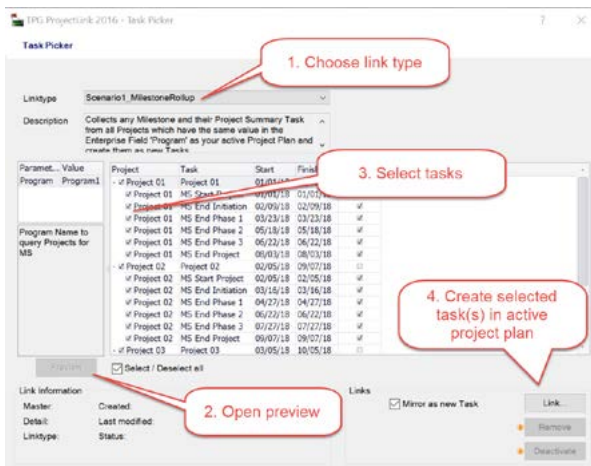
## 7 Which different link types does TPG ProjectLink offer?

- » **Soft links:** Links to the source task are displayed in the target plan for information purposes only in the same row as the target task. There is no actual link, and this does not affect the target tasks with regard to the schedule.
- » **Mirror links:** This 1:1 link creates an individual task in a new row in the target plan. It is linked with the source like a hard link and can be used for information purposes only, if no link with other tasks is created within the target plan.
- » **Rollup:** A possibility to create several source tasks as a list of tasks in the target project in one action at the click of a mouse. Freely configurable.
- » **Hard links:** This can be used to intervene directly in the schedule. With hard links, no new task is created in the target schedule. Instead, this type of link writes directly into the schedule of the target task and thus enforces deadline shifts.

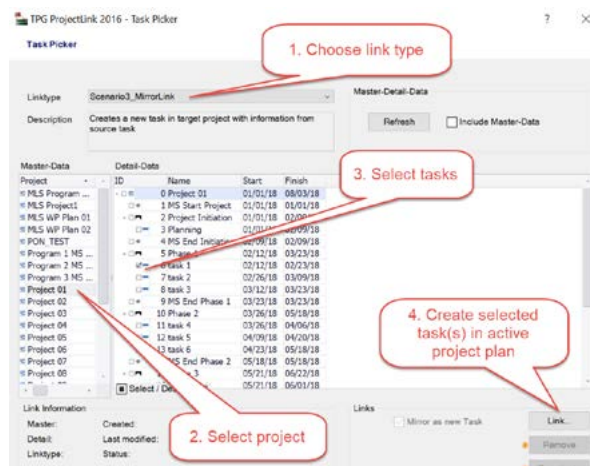
## 8 Is it simple to create a link between tasks from different source projects with my target project using TPG ProjectLink?

Yes, this is very easy because the TaskPicker provides excellent support here. The following image shows the user interface of the TaskPicker and the individual steps:

- » Select link type
- » Select the project from the list
- » Select the task to be linked
- » Click the button to create the link



It is easy to create links using the TaskPicker in TPG ProjectLink (see question 8)



It is that easy to create multi-project overviews using the TaskPicker in TPG ProjectLink (see question 9)

## 9 It is easy to create multi-project overviews using TPG ProjectLink?

Yes, this is very easy using the rollup function. The procedure is described in the following image of the TaskPicker:

- » Select “Rollup” link type
- » Call up the preview of the tasks
- » Click on the tasks to be linked
- » Click the button to create the tasks in the open project

## 10 How can I as a program manager display clearly represented important milestones from different projects? What are the advantages?

With just one click, you create the links to a central program plan using the “Rollup” link type (bottom-up information from sub-projects). As a result, this program plan displays only the information important for the steering committee (milestones and tasks). This reduces complexity and you can focus on what is important thanks to the clear representation.

## 11 How does TPG ProjectLink support program management through top-down planning?

Using Softlinks, you as a sub-project manager show the program specifications in your project. Your advantage: program management does not change the sub-projects from the outside; as a sub-project manager, you have complete control over your schedule, but top-down planning by program management is still possible.

## 12 How can I display project dependencies between projects using TPG ProjectLink?

You can choose which tasks from the source projects you need using the TaskPicker and connect them using the appropriate link type. The advantage: in contrast to MS Project Server / Project Online, several linking possibilities are available:

- » 1:1 links, e.g. external task information in user-defined fields (Softlink),
- » the copy of an external task as a separate row (Mirrorlink) or
- » a list of tasks from various external projects (milestone rollups).

For further detail, see the description of the link types in question 7.)

**13 How does TPG ProjectLink support planning in a line organization?**

Through the intelligent use of Softlinks, you can exchange information between the project plan and the line plan and thus realize distributed planning (rough / detailed planning). The advantage: project plans remain lean and the line managers have their own plans for resource utilization.

**14 Can I realize cross-company links, e.g. for suppliers?**

Yes, this is possible. TPG ProjectLink allows creating links across MS Project Servers. In addition, also data from other data sources can be provided (e.g. SharePoint lists, SQL databases). This can also be realized very easily using Project Online in the Microsoft Cloud.

**15 Can TPG ProjectLink access other data sources and provide these in my projects?**

Yes, this is possible. You can access SharePoint lists and SQL databases based on appropriate configurations to link them with the tasks of the target project.

**16 Which data can be exchanged via TPG ProjectLink and what is the advantage as compared to Project Server/Project Online?**


The basic function of Microsoft Project Server provides all the information of a task from the source project in the target projects in an unfiltered manner. Using TPG ProjectLink, however, you can configure which information is actually displayed.


**17 Does it make a difference in TPG ProjectLink whether I use Microsoft Project Server or Project Online?**

No, there is no difference. All the possibilities and applications of TPG ProjectLink are available both on premises and in a cloud solution.



 Find more information about TPG ProjectLink: [www.theprojectgroup.com/projectlink](http://www.theprojectgroup.com/projectlink)

 Or feel free to contact us anytime at via email: [info@theprojectgroup.com](mailto:info@theprojectgroup.com)

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