

# TPG PSLink®

A Leading Product for System Integration  
and Bidirectional Data Exchange

## TPG PSLINK CONNECTS SUBSYSTEMS TO AN INTEGRATED LANDSCAPE

Middleware for integration connects different subsystems or modules to a large integrated landscape. In this way, it becomes possible to increase the efficiency and quality of work across different applications. This is usually done based on an automated interface.

**TPG PSLink®** is a worldwide leading product for integration and bidirectional data exchange between systems for project management, collaboration, work management and ERP. Thus, the product integrates different environments used at the company in general – however mainly in the project context.

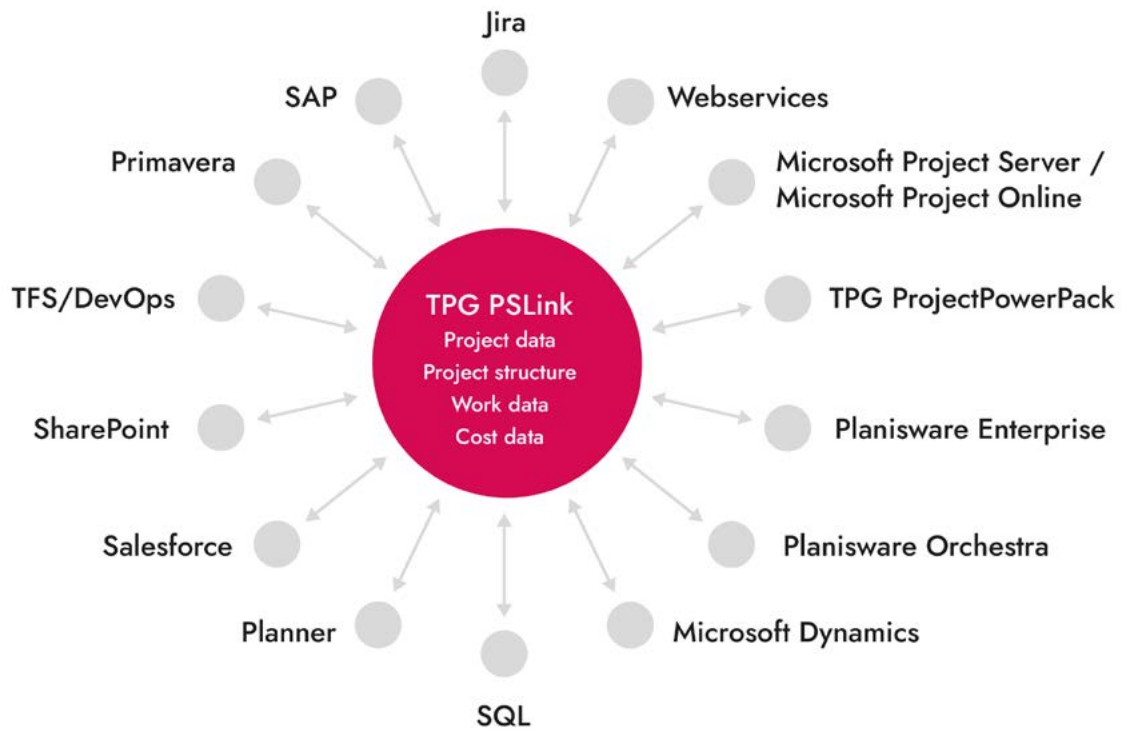
**SAP®** Certified  
Integration with SAP Applications

### 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) are standardized.

### THE BENEFITS

- » End-to-end business and project management processes
- » Integrated project planning, controlling, collaboration and document management
- » No more dual data entry
- » Improved data quality / decision-making basis for project managers, controllers and management



#### Features at a Glance

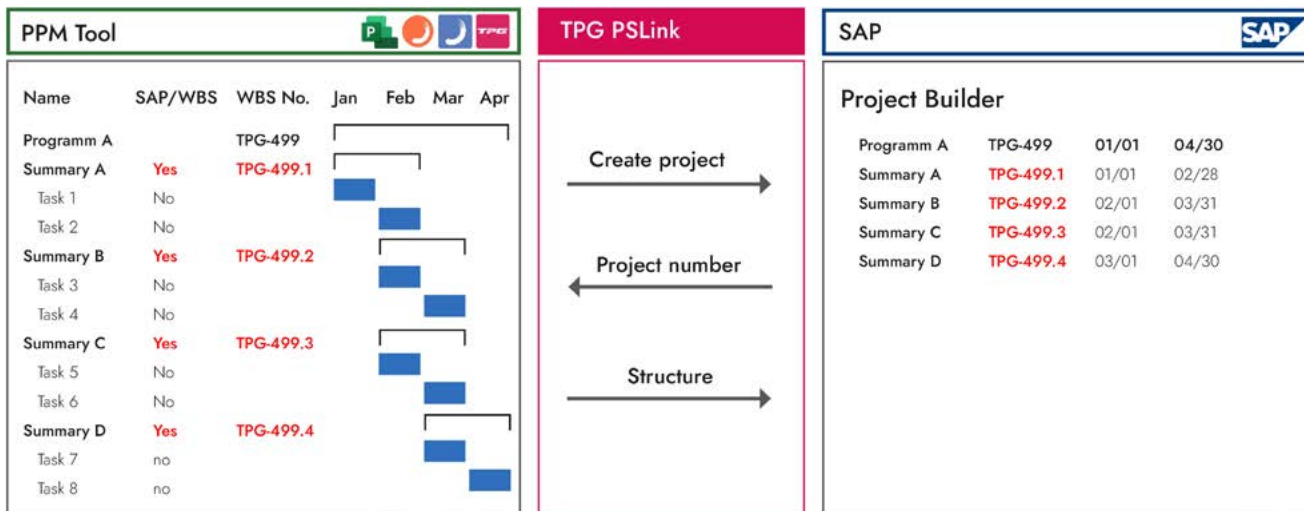
- » Fast implementation for standard use cases
- » Highly configurable product for complex cases
- » Middleware with web client and MS Project add-in
- » Bidirectional data exchange
- » Extensive test mechanisms for ultimate reliability
- » Integration with Microsoft PPM security system
- » Also used as a standalone without PPM system
- » Flexible synchronization with job queue administration
- » Any number of systems, tenants, Project Server sites
- » Proven solution since 1998 with multiple international customer references

## ERP SYSTEM INTEGRATION – USING SAP

The integration of ERP systems such as SAP with Microsoft Project, Planisware, TPG ProjectPowerPack, 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 PPM TO SAP PS

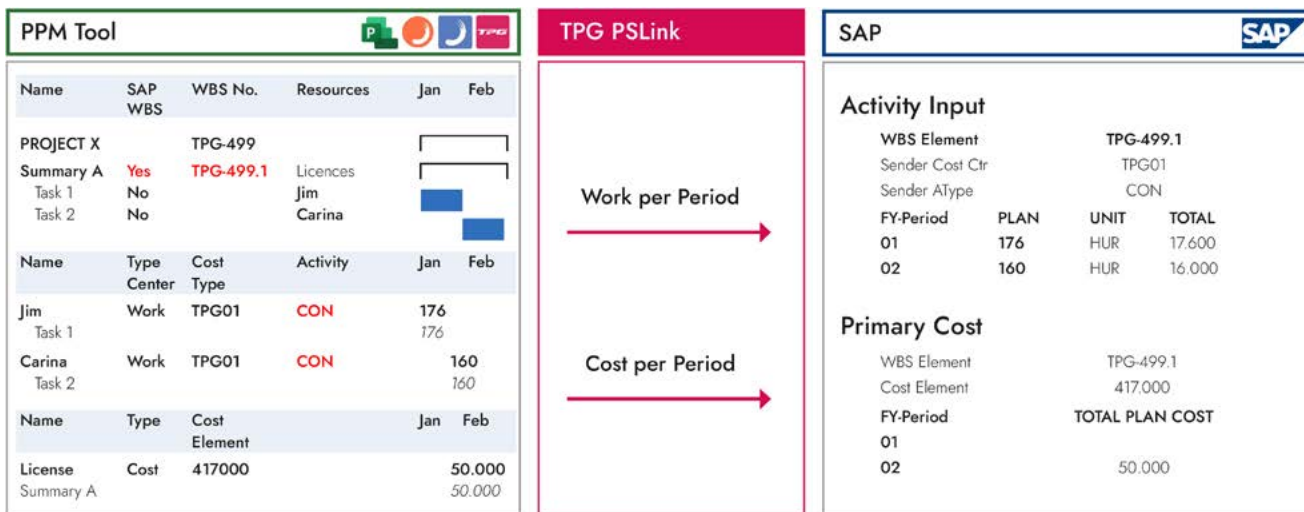
Synchronizing the top level of a project plan with SAP has advantages for both sides. It gives the finance department a good, accurate overview while allowing the project manager to plan details flexibly in the Project and Portfolio Management (PPM) environment. It is also possible to transfer mixed structures from PPM to SAP.



Use case 1: Transferring the first level of the PPM tool to SAP

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

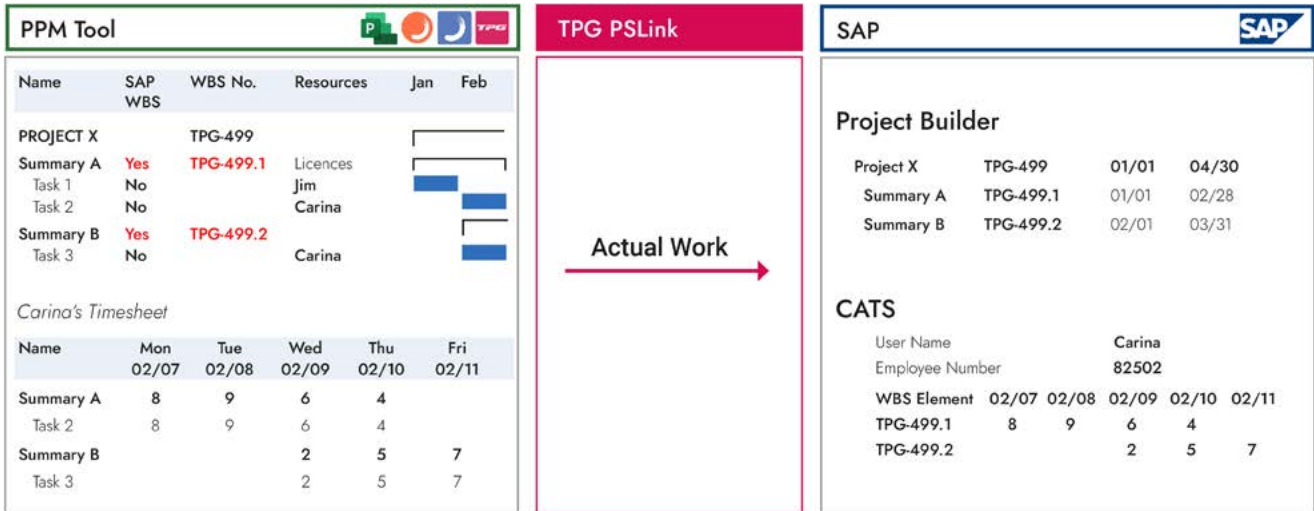
Many companies require budgets to be planned and updated monthly. It is therefore very helpful when all it takes to transfer the project data to the correct structures is a simple click. The integration of PPM and ERP delivers a high ROI and promotes user acceptance.



Use case 2: Transfer of the work and cost forecasts from the PPM tool to SAP

### USE CASE 3: TRANSFERRING ACTUAL WORK FROM PPM TO SAP

In many companies, the actual hours worked on projects must be billed either internally or externally. To do this, they need to be transferred 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 benefits is its fast and error-free data transfer.



Use case 3: Transfer of the actual hours from the PPM tool for allocation in SAP

### USE CASE 4: TRANSFERRING ACTUAL COSTS FROM SAP TO 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.

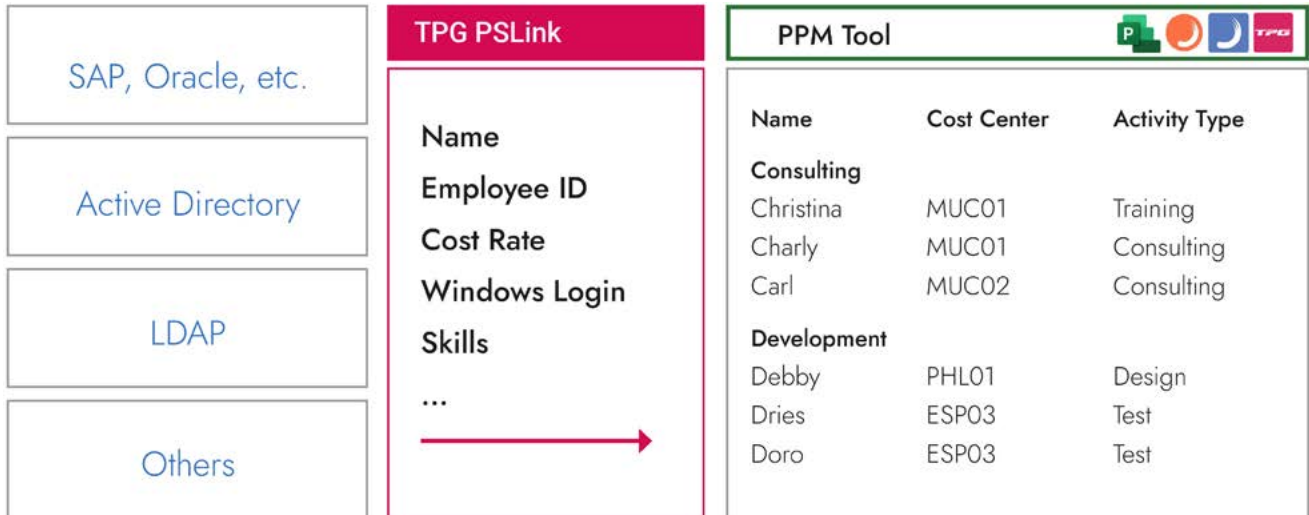


Use case 4: Transfer of invoice data from SAP to the PPM tool

### USE CASE 5: TRANSFERRING RESOURCE DATA TO PPM

Importing large amounts of resource data from various data systems to the PPM enterprise resource pool and updating it on an ongoing basis is an important use case of integration. This provides planning security and supports the project manager, as planning can always be based on the latest resource data.

The data exchange is cost-effective and sidesteps duplicate data maintenance. In addition, errors due to manual data entry are avoided.



Use case 5: Transfer of resource data from diverse sources to the PPM tool



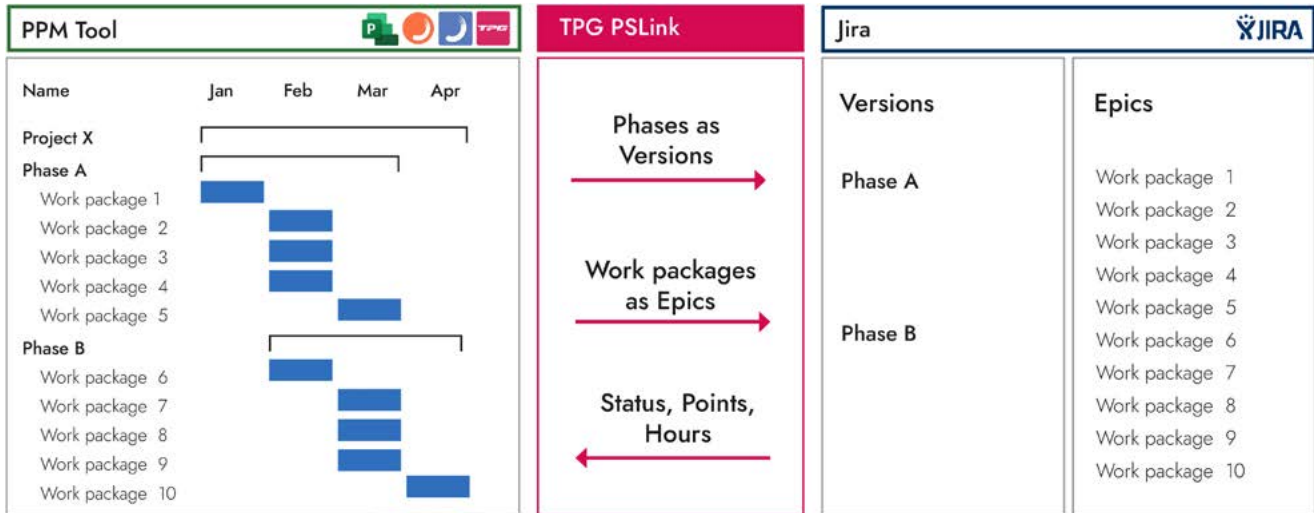
### SOME TPG PSLINK CUSTOMER REFERENCES

- |                               |                                |                       |
|-------------------------------|--------------------------------|-----------------------|
| Airbus, GER/FRA               | Helsinki City Transport, FIN   | Siemens Energy, GER   |
| BAE Systems GBR               | Hydro Quebec, CAN              | Siemens Mobility, CHE |
| Bosch (BSH), GER              | Irish Rail, IRL                | Stora Enso, FIN       |
| DESY, GER                     | Johnson Controls, GER          | Swisscom, CHE         |
| Dimension Data, MEA           | Karl Storz, GER                | Tecnisa, BRA          |
| Dürr, GER                     | Kemira, FIN                    | Tyco Electronics, USA |
| ELM, MEA                      | KFW, GER                       | Vaillant Group, GER   |
| E.ON, GER                     | Lonza, GBR                     | Vorwerk, GER          |
| Exxaro Coal Mines, MEA        | MAN Diesel & Turbo, GER        | Votorantim, BRA       |
| Goodyear, GER/USA             | NATS, GBR                      | etc.                  |
| Grupo Leao, BRA               | QinetiQ, GBR                   |                       |
| Hamburg Port Authority, GER   | Rentschler Biotechnologie, GER |                       |
| Harman International, GER/USA | Rheinmetall, GER/CHE/CAN       |                       |

## 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 and Portfolio Management (PPM) like Microsoft Project Server / Project Online, Planisware or TPG ProjectPowerPack 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 PPM



Use case 1: Transferring the structure from PPM to Jira and the project status from Jira to PPM

In this scenario, the portfolio and project management activities are carried out in the PPM system. 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 (time reporting) for detailed planning and progress monitoring.

For additional use cases, see: [www.theprojectgroup.com/jira-integration](http://www.theprojectgroup.com/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 WITH PLANISWARE, SAP, SHAREPOINT, MICROSOFT

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 or Planisware portfolio and project management and centralized time tracking
- » Jira for sprint planning, task management, issue tracking, workflow management, and status monitoring

The integration enables these data-sharing processes:

- » SAP <> PPM / SharePoint: structures, costs, budgets
- » PPM / SharePoint <> Jira: work packages to Versions / Epics / Issues
- » SAP <> PPM <> Jira: booking of Jira
- » Work Logs and PPM reports to SAP/CATS or SAP for cost allocation in SAP/CO

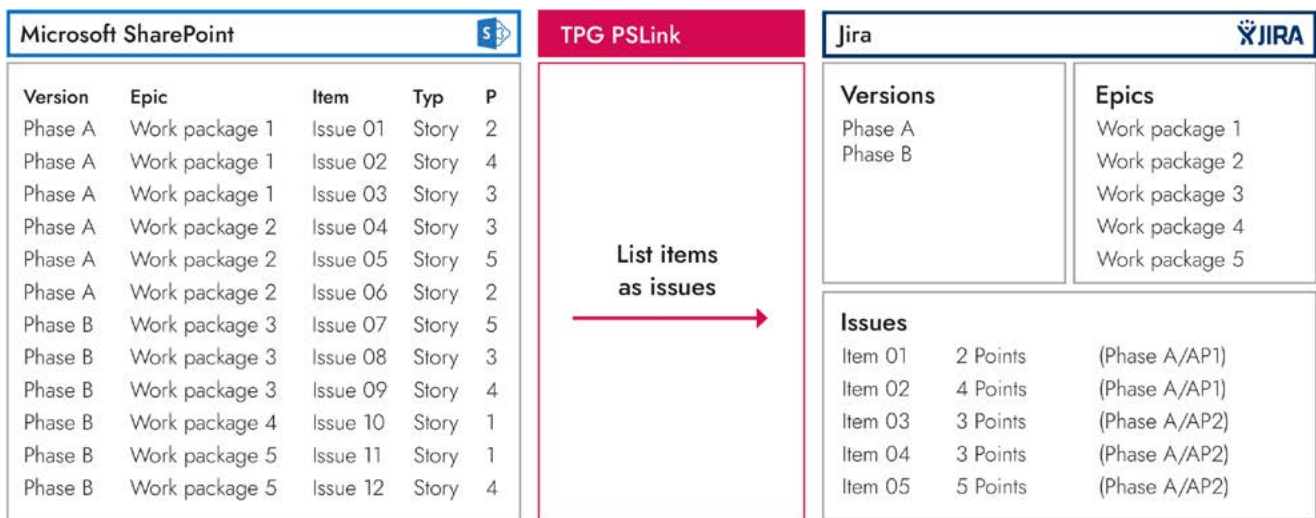
## INTEGRATION SHAREPOINT WITH SAP AND OTHER SYSTEMS

There is a strong need to integrate SharePoint with SAP or other ERP systems as well as with PPM solutions 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:

- » For ERP integration: sharing master data, structures and cost or budget information
- » For projects: sharing project information with SharePoint lists or documents

The following use cases illustrate this. Further use cases are likely.

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



Use case 1: Transferring SharePoint lists as templates saves time (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
- » Customer-related data for use in projects
- » Business units
- » Programs for selection within projects
- » People responsible
- » All types of categories

Many companies require the maintenance of mapping tables with values from different systems (e.g. cost categories from SAP along with cost resources from the PPM system). 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 PPM or Planisware).

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. selection lists for fields defined in the PPM system). 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.

The 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 ERP 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.

Using the SharePoint Connector, you can achieve the following:

- » In SharePoint, checklists for a project in the PPM or ERP system can be created and assigned automatically based on SharePoint templates.
- » They are updated with information from the project plan (e.g. milestone deadlines).
- » The results of the checked checklist items are synchronized with the 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.



### CUSTOMER TESTIMONIALS

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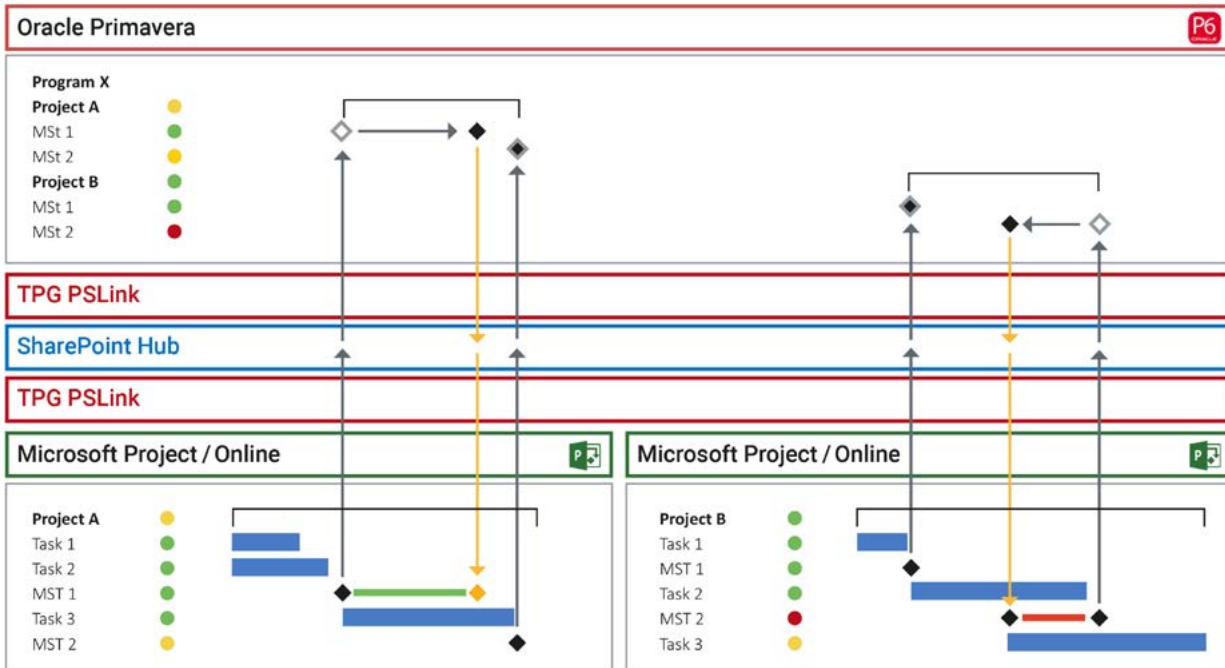
*“Using TPG PSLink, we have been able to reduce the time needed for our regular budget planning from three man-weeks to one man-day.”*

Helmut Kölbl, Senior Program Manager, Harman International

## INTEGRATION PRIMAVERA WITH MICROSOFT PROJECT, SHAREPOINT

Oracle Primavera is a powerful software for planning and managing large-scale projects and programs. Sub-projects, however, are often planned with other project management solutions. TPG PSLink enables a seamless integration and thereby efficient data exchange. The following use cases illustrate the interaction using the examples of Microsoft PPM and SharePoint. Further use cases are likely

### USE CASE 1: INTEGRATION PRIMAVERA WITH MICROSOFT PROJECT



Data exchange between Primavera and Microsoft Project / Project Online via TPG PSLink using a SharePoint hub

In Primavera and Microsoft Project, the processes to be included in the data exchange are marked as such. The project name, task name, start and finish dates of these tasks are synchronized by the TPG PSLink middleware in a SharePoint list. From this hub, the data in the other system can be selected from a dropdown menu and imported to the correct spot in the schedule.



View of the data from a Primavera project in Microsoft Project shown in a table and Gantt chart

The different deadline statuses can be visualized in both systems by splitting the time bar of a task: one bar showing your own plan and one showing that of the external project (see the graphic above). Deviations are immediately recognizable and can be promptly discussed with those responsible. If the collaboration extends beyond corporate boundaries, an integration that avoids the problems associated with access permissions is especially advantageous.

#### Further benefits of integrating Primavera with Microsoft Project:

- » No media break due to the use of different tools
- » Free choice of tool for the sub-projects / supplier
- » No manual exports / imports
- » Real-time synchronization
- » Restricted publication of project plan data
- » Avoidance of permission problems with external projects
- » (Sub-)project manager and program planner maintain control over their plans
- » One single “source of truth” on the SharePoint hub
- » Fast reporting cycles

#### USE CASE 2: INTEGRATION PRIMAVERA WITH SHAREPOINT

Integrating SharePoint with Primavera offers new options to optimize planning processes:

- » **Master data in SharePoint and other systems:** 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. Primavera). Lists like these can be read from the source system and imported into the target system (such as the selection lists for Primavera fields) using TPG PSLink.
- » **Reporting the status of work packages in SharePoint:** Using TPG PSLink, you can make work package data available in SharePoint. The data maintained there can be imported into Primavera or the ERP system.
- » **Linking SharePoint checklists with other systems:** TPG PSLink allows you to automatically create and allocate checklists for a project in Primavera based on SharePoint templates. These are updated with information from the project plan (e.g. milestone deadlines). The updated checklist items are synchronized with project milestones and phase-related fields in Primavera (e.g. completed phase milestone, change of status, etc.).



Find further information on integration options with TPG PSLink here:  
[www.theprojectgroup.com/pslink](http://www.theprojectgroup.com/pslink)



Or feel free to contact us anytime via e-mail:  
[info@theprojectgroup.com](mailto:info@theprojectgroup.com)



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