

TPG PSLink - User Guide

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1 General Features

TPG PSLink is a middleware solution for integrating project management, collaboration, work management, and ERP systems. The software enables the automated, bidirectional exchange of data between different application systems. By connecting multiple subsystems into an integrated system landscape, TPG PSLink supports efficient and consistent collaboration across various business units.

The software is designed to synchronize information between participating applications, thereby ensuring a central, consistent database. This is particularly relevant in a project environment, where planning, management, and controlling processes are typically distributed across multiple systems.

Types of Integration

TPG PSLink supports three basic forms of integration:

1. Functional integration:

Multiple specialized applications are functionally consolidated into a larger, integrated system. This allows processes to be centralized and tasks to be executed in a shared environment.

2. Data integration:

Participating systems access the same consistent data set. This reduces redundancies and enables a unified data base for all user groups.

3. Business process integration:

Business processes are supported by standardized, cross-system workflows. This enables end-to-end workflows across system boundaries (e.g., based on reference models or business frameworks).

Benefits of the Solution

The use of TPG PSLink offers the following advantages:

▪ End-to-end business and project management processes:

Processes spanning planning, execution, controlling, and documentation can be automated and standardized across systems.

▪ Integrated workflows:

Project planning, project controlling, collaboration, and document management can be seamlessly integrated.

- **Elimination of redundant data entry:**

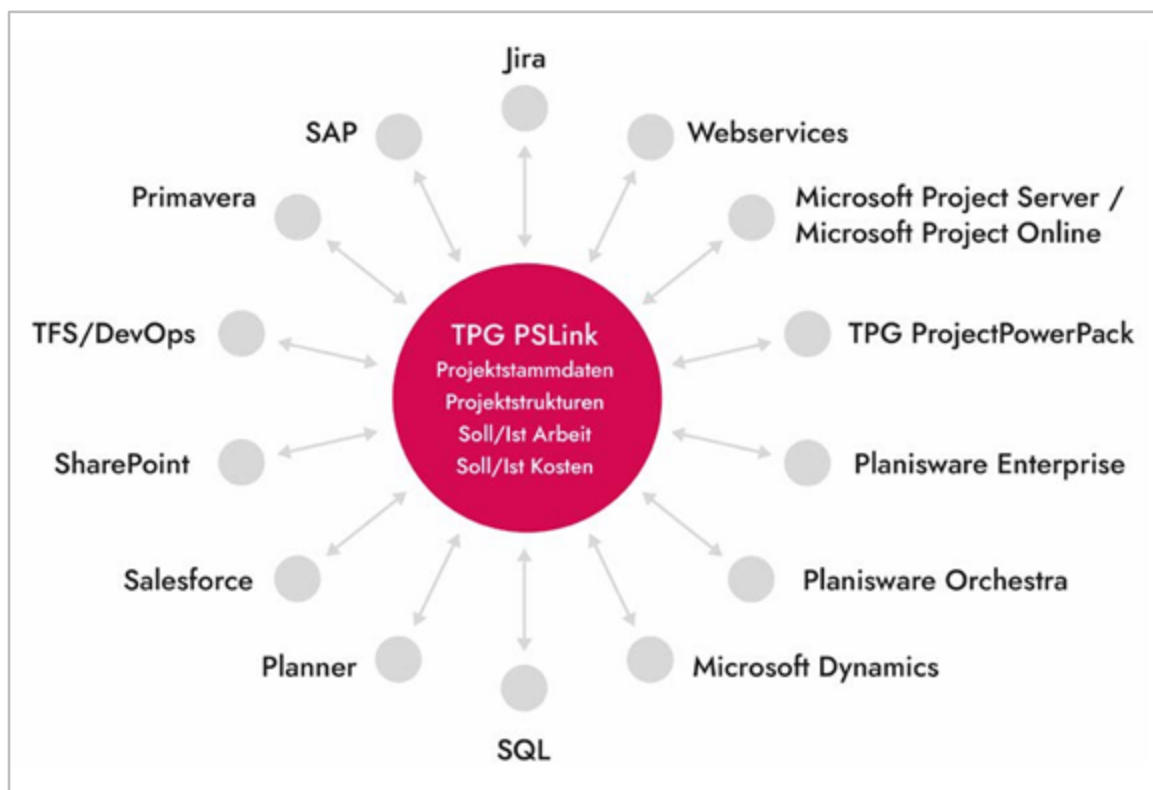
Data needs to be maintained only once and is then consistently available to all connected systems.

- **Improved data quality:**

Centralized synchronization reduces errors and inconsistencies.

- **Improved decision-making:**

Project managers, controllers, and management receive up-to-date and reliable information for their analyses and decisions.



1.1 Views and Functions PSLink

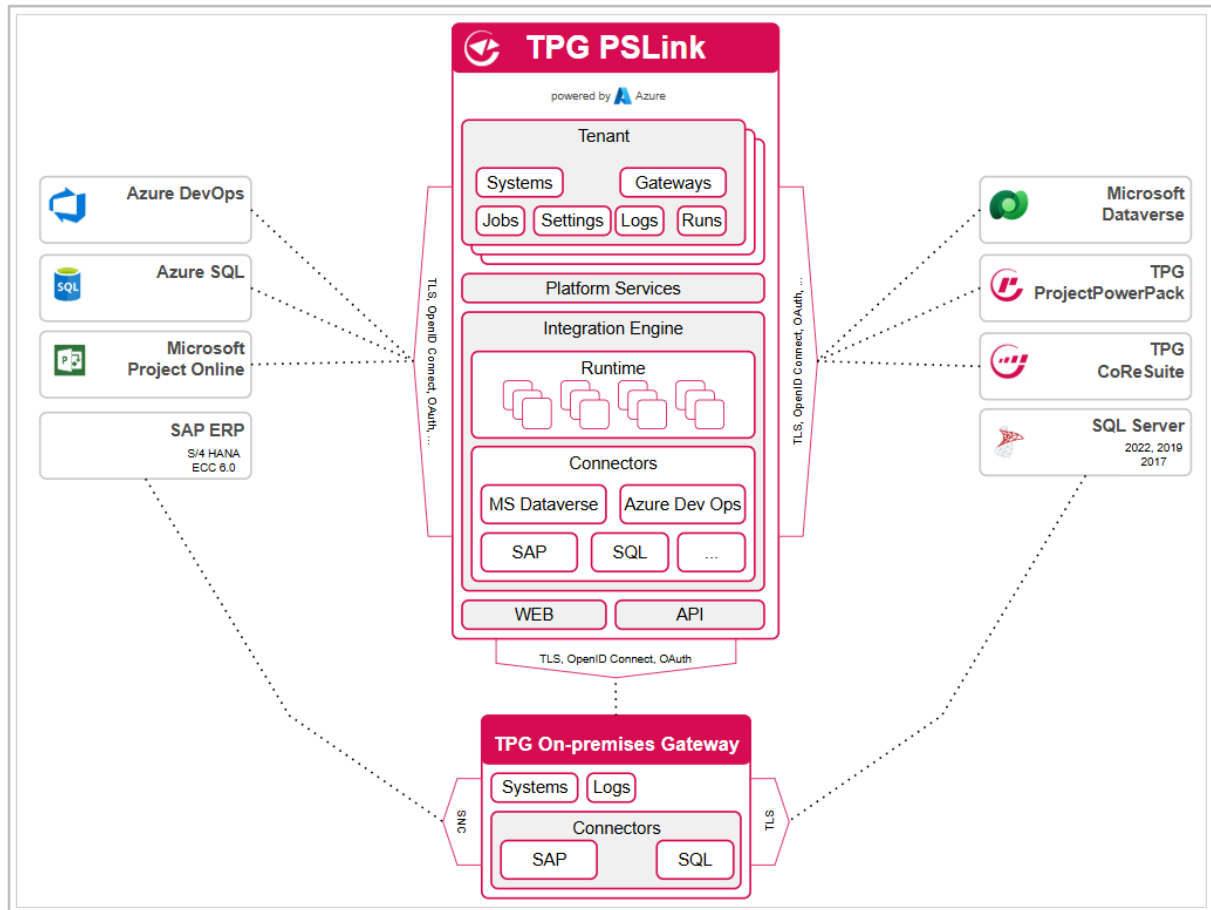
TPG PSLink offers various views and functions:

- Operations view with jobs and system links
- Settings view with systems, gateways, sites, users, and roles
- Quick implementation for standard use cases

- Highly configurable for complex scenarios
- Middleware with web client / Microsoft Project add-in
- Bidirectional data exchange
- Numerous validation mechanisms for maximum reliability
- Integrated with Microsoft PPM permission system
- Works even without a PPM system
- Flexible synchronization with job queue management
- Unlimited number of systems, clients, and Project Server sites
- Available language: English

► Permissions are assigned via roles.

1.2 Architecture and Platform Overview



Containerized Architecture

Integration jobs are executed in isolated, short-lived containers orchestrated by Kubernetes.

Each job runs in its own process, processes data exclusively in memory, and terminates immediately after execution.

This ensures clean, secure, and resource-efficient operation.

Hybrid Connectivity

Azure Relay technology enables secure, firewall-friendly connectivity between on-premises systems and the cloud without requiring any inbound firewall rules.

Regional Hosting

Hosting is available within the EU, thereby supporting GDPR requirements as well as local data residency regulations.

Additional regions, such as Germany (DE), Switzerland (CH), and others, are available upon request.

2 User Interface

The PSLink user interface is explained below:

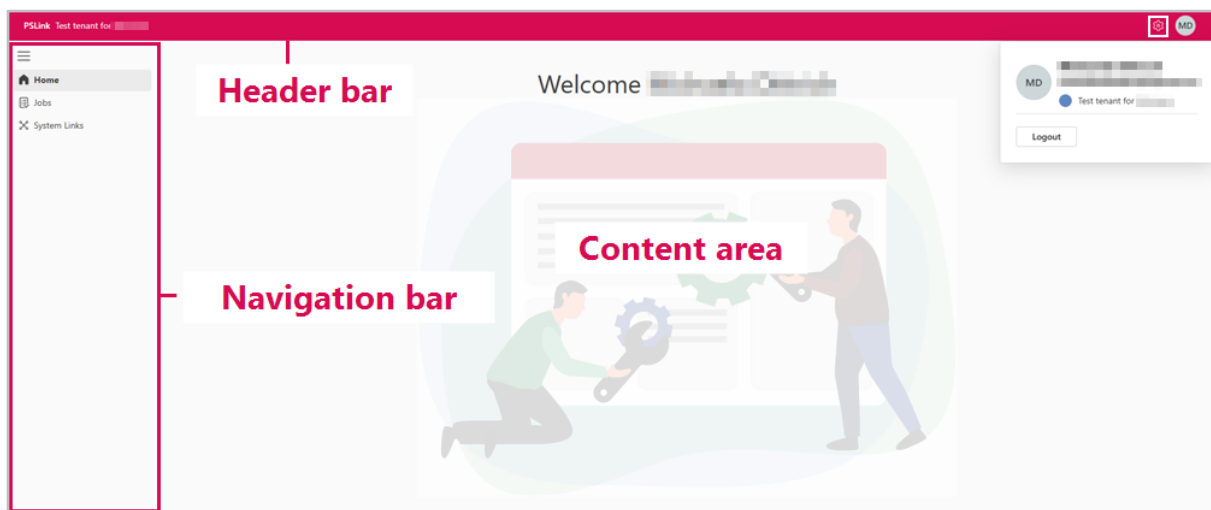
- **Workspace**  7
- **Navigation bar**  8

2.1 Workspace

When you open TPG PSLink, the “Home” page opens by default as the start page.

The workspace is the central area of the application where navigation, content, and functions are provided. The workspace is divided into three sections:

- **Header bar:** Settings and Logout.
- **Navigation bar**  8: Access to the home page, jobs, and systems.
- **Content area:** A workspace for reading and editing data records.



2.2 Navigation Bar

The navigation bar is located on the left side of the user interface. Depending on the content area, the navigation bar offers the following navigation options:

Operations:

- *Home*: Home Page (1)
- *Jobs*: Running, Controlling, and Monitoring Jobs (2)
- *System Links*: Adding Links to Systems (3)



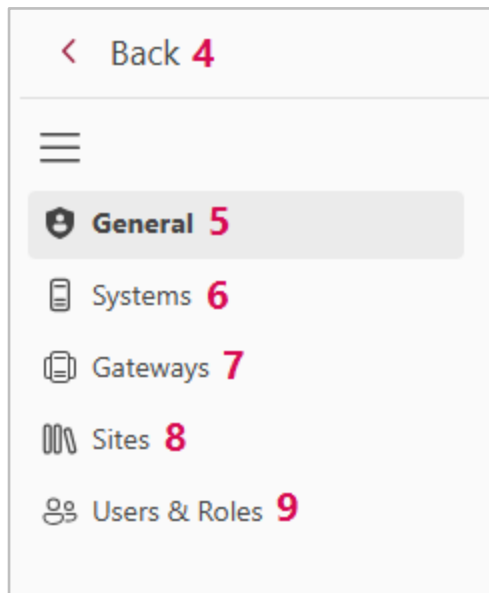
Settings: (only for Tenant Admins)

- Click the gear icon in the header bar to go to the Settings section.



The following navigation areas are available here:

- *Back*: Navigate back to Operations. (4)
- *General*: List and details of all Tenant Administrators. (5)
- *Systems*: Overview of connected systems. (6)
- *Gateways*: Overview of gateways in use. (7)
- *Sites*: List, add, and edit all sites. (8)
- *Users & Roles*: List of all users by role. (9)



► Click the three horizontal lines  to expand or collapse the navigation bar. When collapsed, more space is available for the content area.

3 User and Roles

TPG PSLink is based on a tenant model. A tenant is a multi-tenant unit that typically represents a company or organization. All users, data, and configurations are uniquely assigned to a tenant and kept separate from other tenants.

Within a tenant, there are various user roles with clearly defined tasks and permissions. These roles ensure that the administration, configuration, and use of the software are kept separate and organized.

The following section describes how to initially register an Azure tenant in PSLink and how to manage users, applications, and roles within a PSLink tenant:

- Register an Azure Tenant  10
- Open User Management  14
- Roles and Responsibilities  15
- Add Users and Applications  17
- Assign Roles  19
- Change or Remove Roles  22
- Remove Users or Applications  23

3.1 Register an Azure Tenant

Prerequisites:

Information from the Azure platform is required to set up the Azure tenant.

➤ Follow these links to obtain the information:

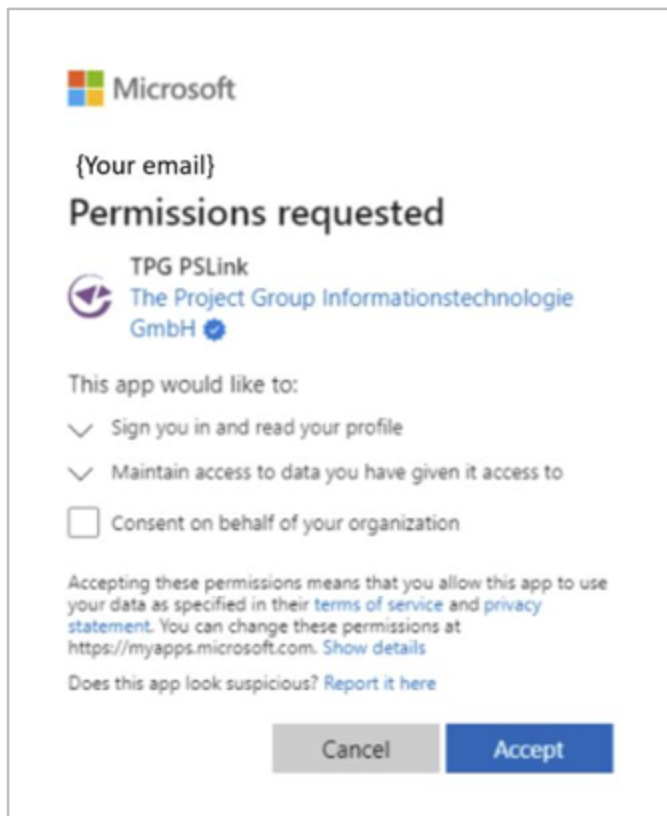
- Azure Tenant ID: <https://learn.microsoft.com/en-us/entra/fundamentals/how-to-find-tenant>
- Object ID of the user or application to be managed in PSLink: <https://learn.microsoft.com/en-us/partner-center/account-settings/find-ids-and-domain-names>

The subsequent management of users and roles requires the appropriate administrator permissions: Tenant Administrator or Site Administrator for the respective site.

Register an Azure tenant:

After the PSLink tenant has been provisioned, the future tenant administrator will receive a personalized access link to their tenant on the PSLink Cloud Platform. To register for the first time, follow these steps:

- Open the PSLink link provided by TPG.
- You will be redirected to the Microsoft sign-in page.
- Sign in with the user account designated as the tenant administrator.
- Click *Accept* to confirm the permissions displayed.



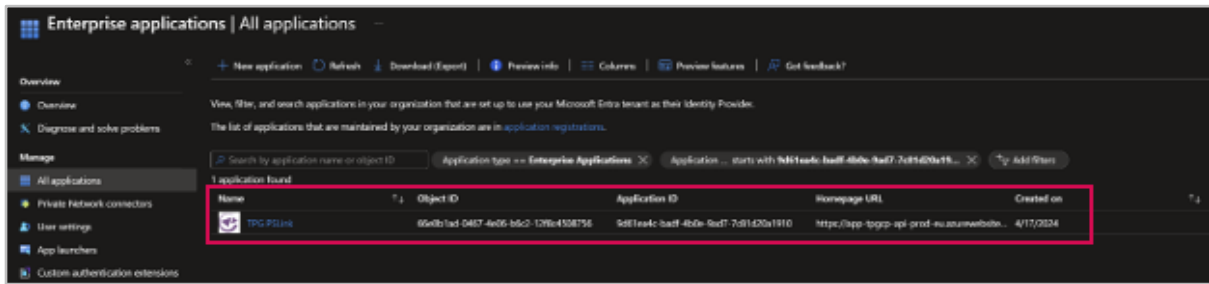
PSLink requires access to basic user information, such as:

- Display name,
- Email address,
- Profile picture.

► This information is used, for example, for user displays and the job history.

After you successfully sign in, the application is registered in the tenant, and you are taken to the PSLink home page.

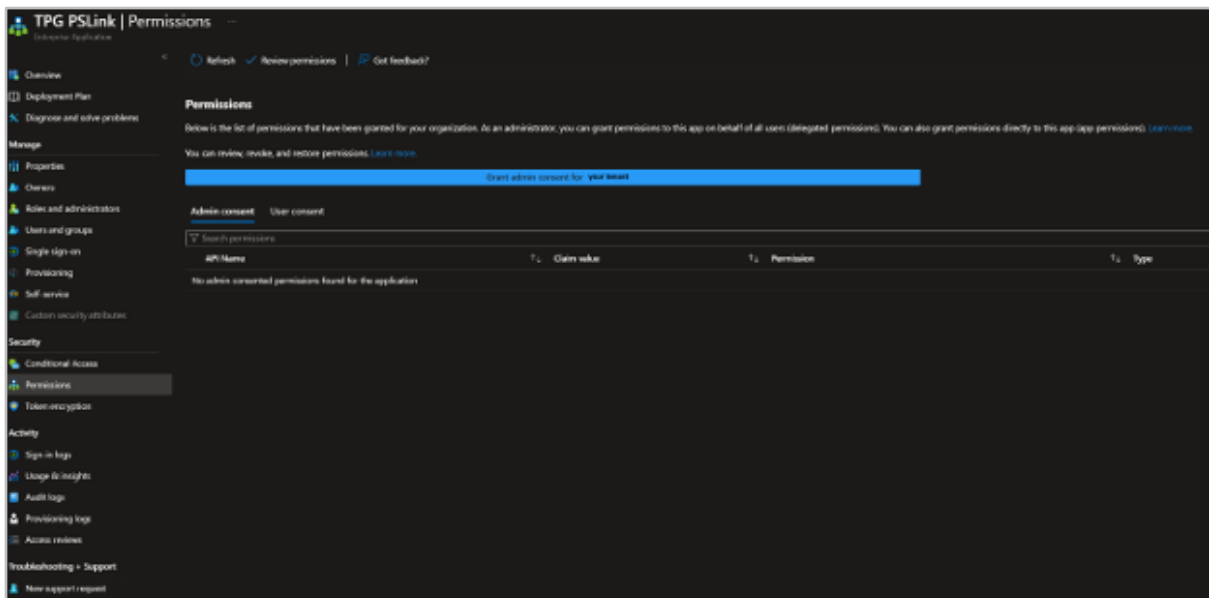
At the same time, the application will appear in the Enterprise Applications section of your Azure tenant.

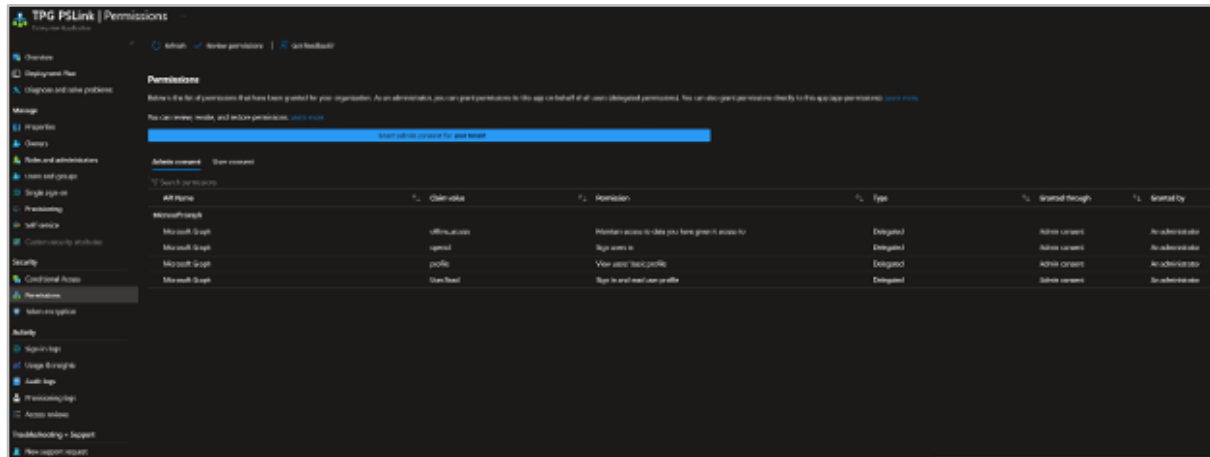


Grant administrative consent for the tenant:

To ensure that all users in the company can use PSLink, an Azure administrator should grant administrative consent (Admin Consent):

- Open the Microsoft Entra Admin Center.
- Navigate to Enterprise Applications.
- Select the TPG PSLink application.
- Open the *Permissions* section and grant administrative permission for your Azure tenant.





► Once approved, users will no longer need to confirm permissions themselves when they log in for the first time.

3.2 Open User Management

To open the user management section, follow these steps:

- Log in to TPG PSLink.
- Click the gear icon in the header bar to access the *Settings* section. (s. [Navigation Bar](#) 8)
- Click *Users & Roles* in the navigation bar.

This is where all users, groups, and applications for the tenant are created, listed, and managed.

PSLink Settings

< Back AS All Sites + Add Users

Users & Roles

Assigned (3) Site Administrators (3) Job Designers (0) Consumers (0) Unassigned (0)

User	Production
☐ M PSLink Admin	Site Administrator × +
☐ MD	Site Administrator × +
☐ SR	Site Administrator × +

3.3 Roles and Responsibilities

Users can be assigned multiple roles for each site. The following roles are available:

Tenant Admin

The Tenant Admin is the highest administrative role within a tenant.

Roles and Permissions:

- Read and edit tenant metadata
- Add and remove users from the tenant
- Retrieve tenant administrators
- Assign and remove users from the “Tenant Administrator” role
- Manage systems in the tenant
- Manage local gateways
- Manage sites in the tenant
- Has all the permissions of a Site Administrator for each site

► The Tenant Admin is responsible for the tenant's basic organizational and technical structure, but generally does not work with jobs on a day-to-day basis.

Site Admin

The Site Admin manages one or more sites within a tenant.

Tasks and permissions:

- Read and edit site metadata
- Read role assignments for identities (users and groups) in the site
 - Read site administrators in the site
 - Read job designers in the site
 - Read consumers in the site
- Read identities (users and groups) in the tenant
- Assign and remove identities (users and groups) from site-specific roles such as Site Administrator, Job Designer, and Consumer

- Manage system links
- Read basic system data
- Read basic gateway data
- Read all job executions for a site
- View all permissions of a Job Designer for this site

► The site administrator ensures that users within the site have the appropriate permissions and can work efficiently.

Job Designer

The Job Designer is responsible for creating and maintaining jobs.

Tasks and permissions:

- Edit jobs
- View job details (job definition)
- Add and delete jobs
- Test systems
- Retrieve metadata from systems
- Test gateways
- All permissions of a consumer for this website

► The Job Designer performs technical and subject-matter-specific tasks but does not have access to the tenant's or site's administrative settings.

Consumer

The Consumer is the end-user role.

Tasks and permissions:

- Read site metadata
- Read tenant metadata
- Read system links

- Read jobs
- Read own job runs
- Run jobs

► Consumers use the jobs provided by job designers without changing their configuration.

Interaction between Roles

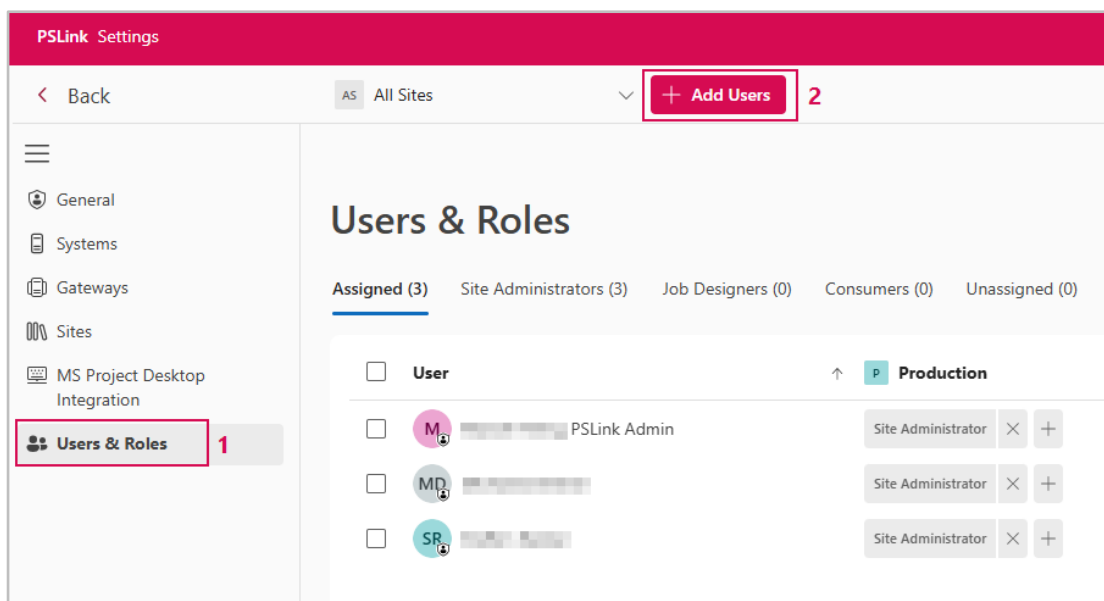
The roles build upon one another functionally:

- The Tenant Admin creates and manages the tenant and the sites.
- The Site Admin organizes users and permissions within a site.
- The Job Designer creates the business content (jobs).
- The Consumer uses this content for their daily work.

3.4 Add Users and Applications

Add a User:

- Open *Users & Roles*. (1)
- Click *Add Users*. (2) ► The Users section opens by default. Here you'll find a list of all users.



- Enter the name of the desired user in the search field to narrow down the list. (3)
- Select the desired user from the list.
- Select the user in the results list. (4)
- Click *Add Selection*. (5)

Add Users 3

Q ac Show selected Show added

5 + Add Selection (1)

Users Applications

Name	Domain
☐ A accounting	accounting@theprojectgroup.com
☐ AC accounting@tpg	accounting@theprojectgroup.com
☒ AS accounting@tpg	accounting@theprojectgroup.com
☐ O accounting@tpg	accounting@theprojectgroup.com
☐ T accounting@tpg	accounting@theprojectgroup.com

-
- ▶ The user is added to the tenant but does not yet have any roles.
-

Add an Application:

In addition to users, you can also add applications (service principals):

- Open *Add Users*.
- Click *Applications*. ▶ The Applications section opens. Here you'll find a list of all applications.

Add Users

Q Find Applications Show selected Show added

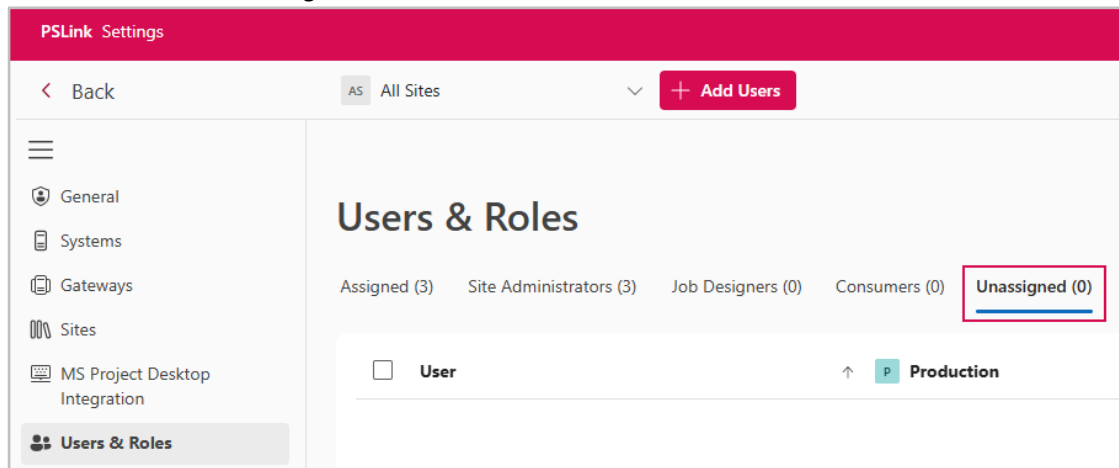
Users **Applications**

- Enter the name of the desired application in the search field to narrow down the list.
- Select the desired application from the list.
- Select the application in the results list.
- Click *Add Selection*.

3.5 Assign Roles

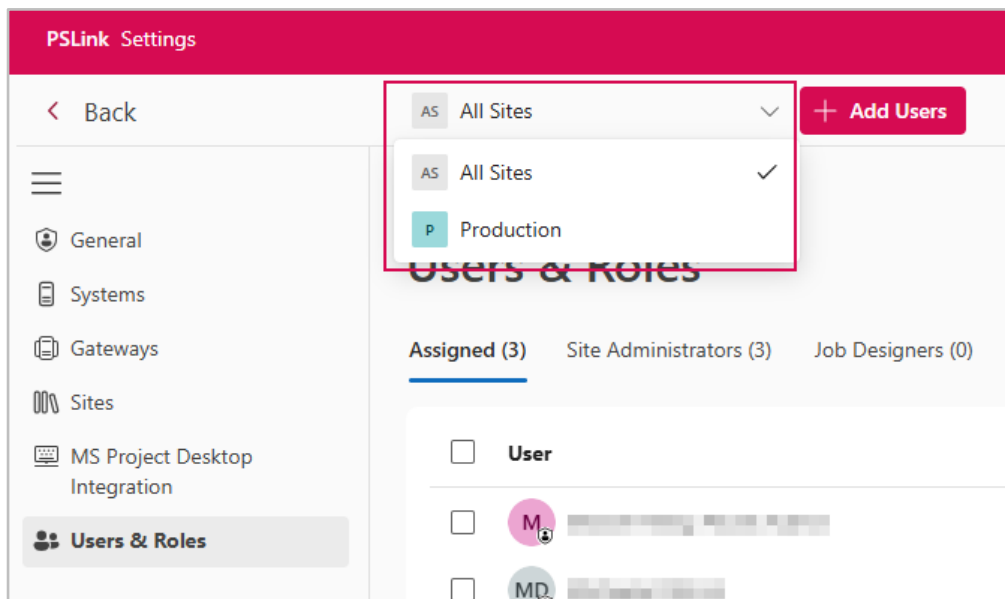
After adding a user or an application, at least one role must be assigned. Role management takes place in the *User & Roles* section.

- Newly added users are initially displayed without a role or permission. You can find users without a role under *Unassigned*.

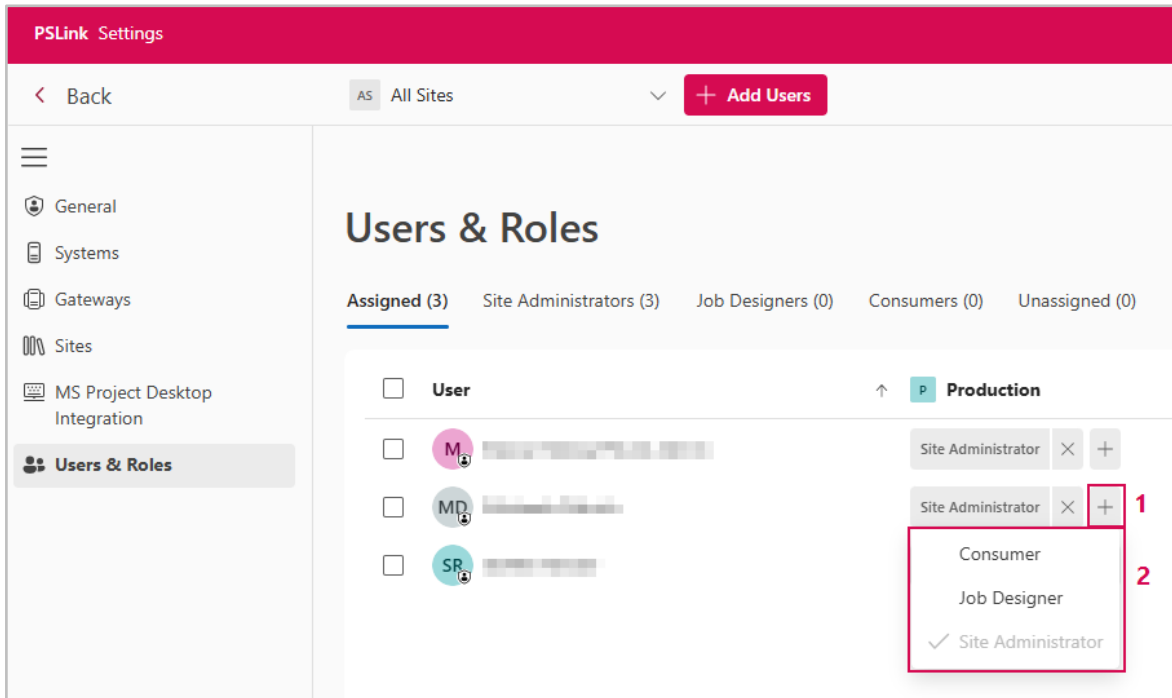


Assign a Role to a User:

- Open *Users & Roles*.
- Select the desired site using the Site Selector.



- Search for the user or application in the list.
- Click +. (1) ➤ A drop-down menu opens.
- Select the desired role. (2)



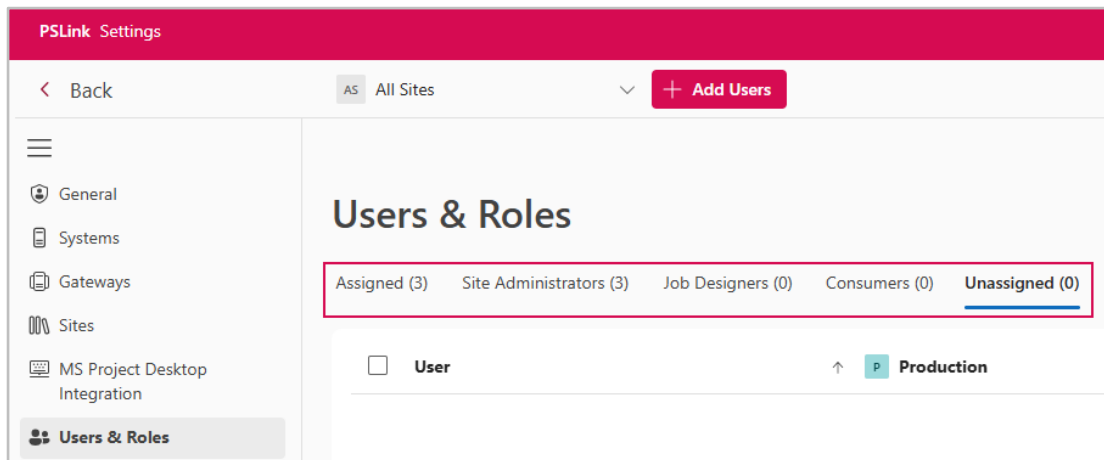
The user will then have the permissions associated with the selected role.

Filter Users:

Users can be filtered and displayed based on their assigned roles. The following sections are available for this purpose:

- *Assigned:* All users who have been assigned a role.
- *Site Administrator:* Users with the Site Administrator role.
- *Job Designer:* Users with the Job Designer role.
- *Consumer:* Users with the Consumer role.

- *Unassigned*: Users without a role.



- Click the desired section to view the corresponding users.

3.6 Change or Remove Roles

Remove a Role:

- Select the desired user.
- Click the X next to the relevant role.
- ▶ The role assignment is removed immediately.

Replace a Role:

- Remove the existing role by clicking X.
- Add the new role by clicking +. (s. [Assign Roles](#) ¹⁹)

PSLink Settings

< Back AS All Sites + Add Users

Users & Roles

Assigned (3) Site Administrators (3) Job Designers (0) Consumers (0) Unassigned (0)

User	Production
M	Site Administrator X +
MD	Site Administrator X +
SR	Site Administrator X +

3.7 Remove Users or Applications

If a user or application no longer requires access, the user can be removed from the tenant. This deletes all associated role assignments.

The following are required for removal:

- Tenant ID or Tenant Key
- Principal ID of the user or application

► Deletion is performed using the PSLink API function *removePrincipal* and is typically carried out by administrators. Therefore, please contact the responsible administrator.
