

Integrating TeamDirection and Microsoft Project

Link a Microsoft Project file to a TeamDirection Project and Report Progress

*This feature is available only in the **Plus Edition**.*

Using the **Linked Project** feature in **TeamDirection Project**, you can select **an entire project tree** or just **a summary task** in a **Microsoft Project file**, bring it into **TeamDirection Project** and **report project progress**.

First, you have to create a new project by bringing the **Microsoft Project** plan or just one of its **summary tasks** into **TeamDirection Project**:

1. Open the **Project Organizer**
2. Click **File -> Create Linked Project**.
3. Choose the file format to link to: **Microsoft Project**. Click **Next**.
4. Select the **file name** to import. Click **Open**.
5. Select the **target task** to import. This can be **the whole project** or one of its **summary tasks**. Click **Finish**.

The imported linked project will open in **Project Viewer**.


The table below shows which **Microsoft Project** task fields are imported and mapped to **TeamDirection Project** task fields:

Fields in TeamDirection Project	Imported from Microsoft Project
Task Name	Y
Duration	Y
%Complete	Y
Assigned	Y
Priority	Y
Start Date	Y
Finish Date	Y
Include Weekends	Y
Notes	Y
Estimated Cost	N
Actual Cost	N
Cost Variance	N
Cost 1	N
CostRollup1	N
Text1	N
Text2	N
Date1	N
Date2	N

Reporting Progress

As your team starts executing the project, you can now use the **Linked Project** feature to report progress into the original **Microsoft Project** file.

When the **TeamDirection Project task fields** are getting updated in the course of project execution, you can choose to update the linked Microsoft Project file:

1. Open the linked **TeamDirection project** in **Project Viewer**.
2. Click the **Report Progress to MS Project** button  on the toolbar.

- OR -

1. Click on the project in **Project Organizer**.
2. Right click the project and click **Report Progress** on the right click menu.

When you use the **Report Progress** feature, the following fields will be updated:

Fields Changed in TeamDirection Project	Updated in Microsoft Project
Task Name	N
Duration	N
%Complete	Y
Assigned	N
Priority	N
Start Date	N
Finish Date	N
Include Weekends	N
Notes	Y
Estimated Cost	N
Actual Cost	N
Cost Variance	N
Cost 1	N
CostRollup1	N
Text1	N
Text2	N
Date1	N
Date2	N

If you modify the project plan **in Microsoft Project** (add/delete tasks, links, etc.), the following changes will be performed to the **linked TeamDirection Project** when you click **Report Progress**:

Microsoft Project Plan Changes	Updated In TeamDirection Project
Task dependencies (links)	Y
Tasks order	Y
Tasks hierarchy	Y
Tasks added	Y
Tasks deleted	Y

If any modifications to the project plan (add/delete tasks, links, etc.) get performed in **TeamDirection Project**, they will not be updated in **Microsoft Project** when you click **Report Progress**.

