

Article for MPA ezine – April, 2007
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RE: Linking between 2 projects – a matter of symantics !!!


This question came to me through a reader writing to the "Ask the Teacher" mailbox. It is very much appreciated when questions are sent. It lets me know what you for thinking and what features are important to you.

Question: I am interested in linking tasks between projects. When a task in one project changes, I want it to affect the schedule of the task in another project. I tried the directions provided in Help and they don't seem to be working right. How would I accomplish this in MS Project 2003.

Answer: The help directions you sent me are as follows:

Link selected fields dynamically between Project plans

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1. In Microsoft Office Project 2003, open the project containing the source information you want to link, and then select that information.
2. Click **Copy Cell** .
3. Open the project into which you want to paste the information.
4. On the **View** menu, click the sheet view you want.
5. Select the area where you want to paste the information. You can paste into another project or into the same project.

When pasting a text object into a sheet view, select the field where the upper-left corner of the information should be pasted. Make sure there are enough blank fields in the view to accept the object without overwriting existing fields.

6. On the **Edit** menu, click **Paste Special**, and then click **Paste Link**

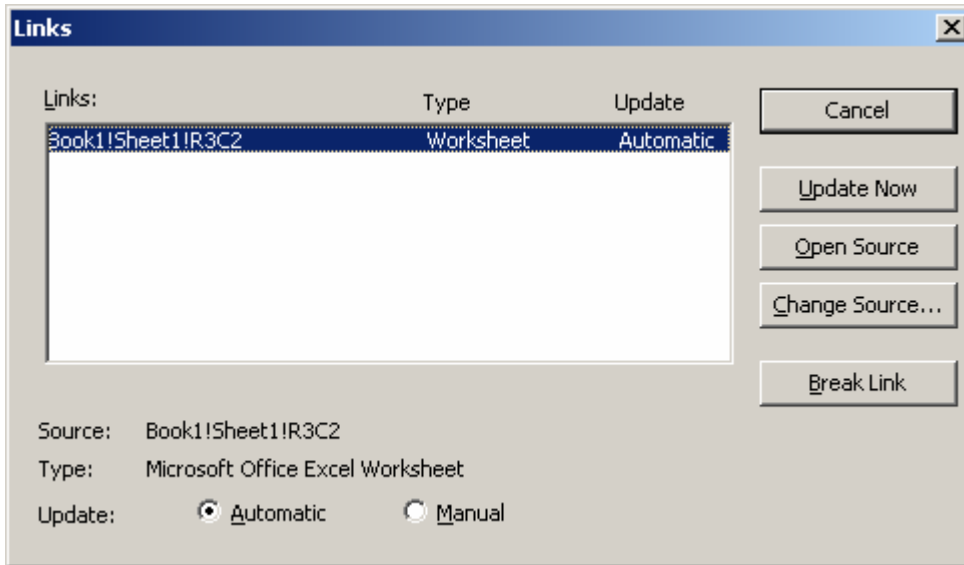
Whenever you change information in the source project, Project will now update the information in the destination project automatically

I think this is a situation of symantics. What you are trying to achieve is linking tasks between 2 projects. The directions is for "Linking fields between Project schedules" The directions above will very effectively link a cell in an Excel spreadsheet to a field value in MS Project (any level). This can be very effective for updating a fixed cost amount which is maintained in Excel but should be updated to a schedule. The trick here, however, is to select an Excel field that is fixed and won't move as additional values are added to a total.

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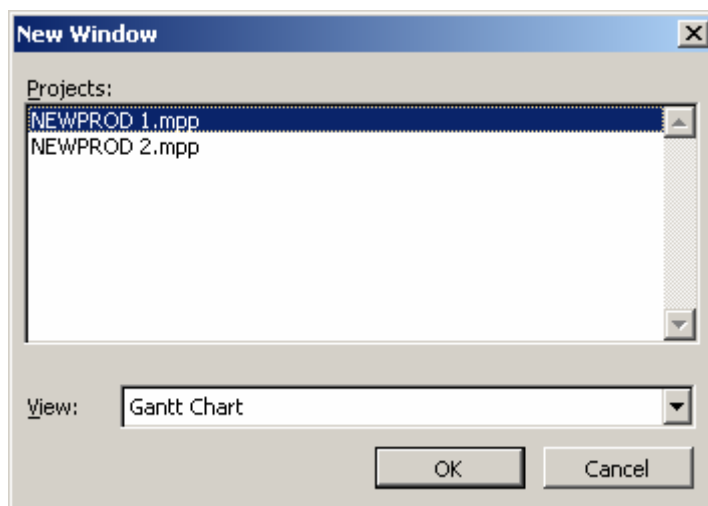
To view these types of links – Edit → Links and you will receive the following form:



However, to link tasks between projects, which is what you are trying to achieve, so that the progress on one task in Project A will affect the schedule of a task in Project B, please follow the following steps:

NOTE: These steps will also work for projects published to MS Project Server.

1. Open both projects in MS Project (any level)
2. Window → New Window




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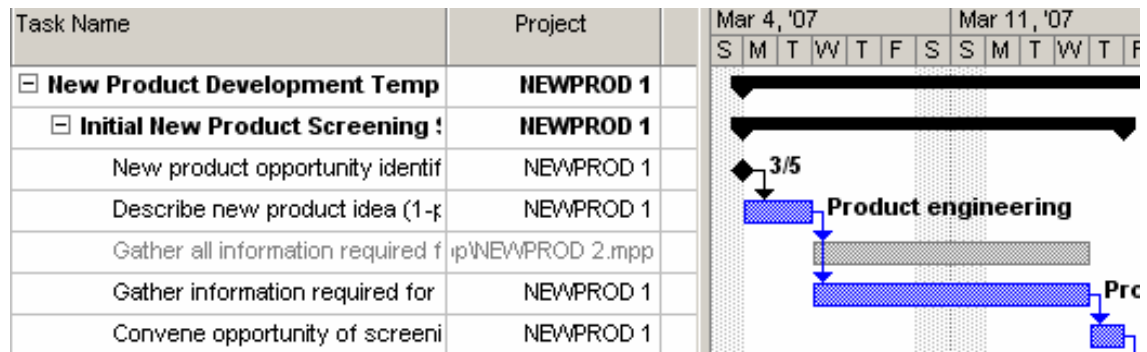
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3. Select both file names (hold "Ctrl" key and click file names)
4. Click "Ok"
5. A new temporary file will be created containing both project schedules.
6. Select the task that would be the driving task (predecessor task) in the temporary file.
7. Hold "Ctrl" button
8. Select the task that would be the successor task – let go of "Ctrl"

NOTE: It would be nice if you could use the "Predecessor" column for this linkage or the "Task Information box, predecessor tab" but both will refer to the individual projects, not tasks in the other project.

9. Click link tasks on the standard toolbar 
10. Double clicking on the link line will allow for changes to link types or add lead or lag.
11. Close the temporary file and **do not save**.
12. Look at the project schedule you linked from, you should see a grey task name with a grey Gantt bar indicating that it is a link to another project. The file that is linked to will also show a grey task and Gantt bar. The viewing is controlled by an option set in Tools → Options → View for external predecessors. See below.

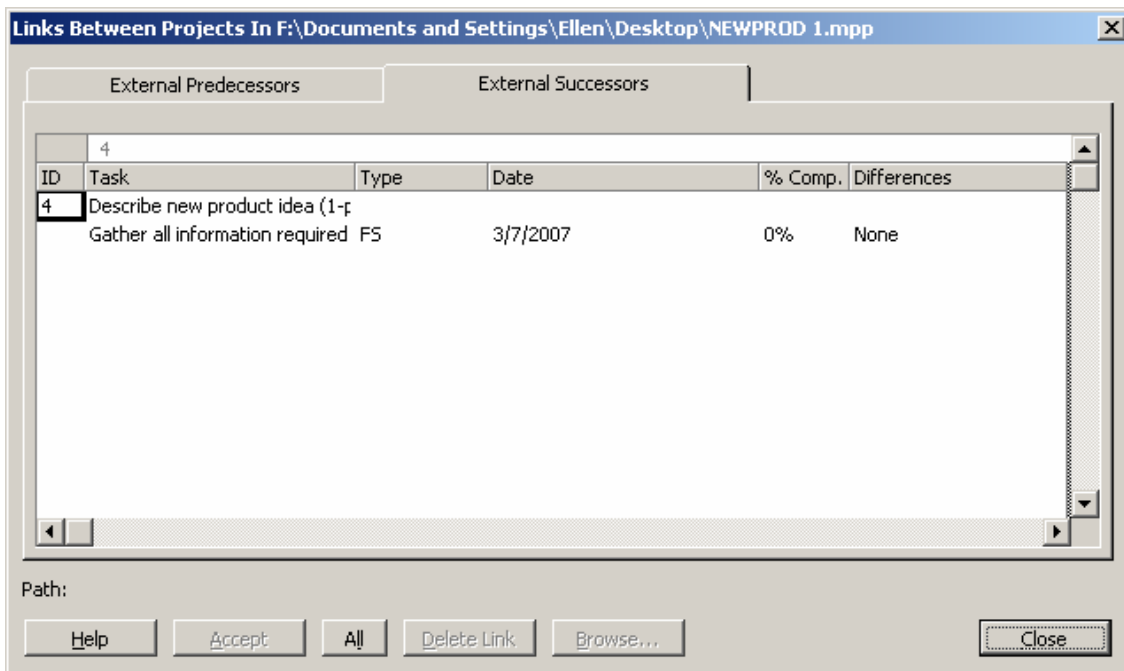


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NOTE: When using standard templates, you may have a problem of duplicate task names which may cause confusion. I would suggest inserting the column called "Project" (see above) into tables to help with solving the confusion. You will also see that you can create an argument for short project names. Tasks with links seen in the Project Center in MS Project Server will also appear in grey.

To check the links click on Tools → Links between Projects



You have an External Predecessors and External Successor tab so the link can be viewed from either project schedule. After creating a link, this box will appear (if the option is set) when the schedule is opened. If there are changes, you have the ability to accept the changes or delete the links. An option could also be set to automatically accept the changes.