

Compuware Optimal Trace[™]

Optimal Trace[™] – MS Project Integration

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1 Introduction

This document describes how to import Optimal Trace[™] Projects into MS Project 2000 and MS Project 2002.

Optimal Trace[™] is supplied with a Report Generation plug-in that enables Optimal Trace[™] to export a Optimal Trace[™] Project to a CSV (Comma Separated Value) file that can be imported into MSProject.

2 Exporting a CSV file from Optimal Trace[™]

To export a CSV file, launch Optimal Trace[™], open an existing project, and go to the 'Project\ Export Project...' menu option. Select the 'MS Project Export' profile, and hit the 'Export' button. This will generate a file called 'MSProject-Optimal-Trace-Detailed.csv in the directory specified in the dialog box ('...\Optimal Trace Enterprise <Version>\projects\export' by default).

3 Configuring MS Project 2000

To configure MS Project, you need to create a MS Project Map file. This Map file tells MS Project what format to accept the file exported from Optimal Trace[™] in.

A pre-built Map exists within the MS Project file that is supplied with Optimal Trace[™]. To install this, first open this 'MSProject-Optimal-Trace-Map-Holder.mpp' file which is located in the directory 'Optimal Trace Enterprise <Version>\export\msproject-detailed' and do the following:

 Go to 'File/Open' and open the Optimal Trace[™] CSV file that we just exported from Optimal Trace[™]. You will then be prompted to select an Import Mapping. • Hit the 'Organizer' button, this should bring up the organizer dialog as follows:

Forms	Table	es	Filters	
Views	Repo	rts	Modules	
Fields	Grou	ps 🕴		
Calendars	Toolba	ars	Maps	
GLOBAL.MPT': "Who Does What" report Compare to Baseline Cost data by task Default task information Earned value information Eng. Map Export to HTML using standard ter Resource "Export Table" map Task "Export Table" map Task "Export Table" map Task and resource PivotTable Task list with embedded assignmer Top Level Task list		MSProject- MSProject-	Catalyze-Map-Holder.mpp Catalyze Catalyze-Detailed)': A
Maps available in:		Maps availa		

- Select 'MSProject-Optimal-Trace-Detailed' Map available in this project on the right hand side.
- Select the 'Copy' button in the middle; this should now copy the 'MSProject-Optimal-Trace-Detailed' Map into your MSProject global template.
- Select 'Close', this will bring you back to the Import Mapping dialog box.
- Select the new 'MS-Project-Detailed' Map, and select 'Open'.

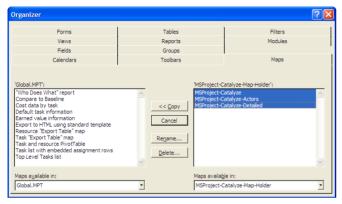
This should create a new MS Project project using skeleton data imported from your Optimal Trace[™] project.

4 Configuring MS Project 2002

To configure MS Project, you need to create a MS Project Map file. This Map file tells MS Project what format to accept the file exported from Optimal Trace[™] in.

A pre-built Map exists within the MS Project file that is supplied with Optimal Trace[™]. To install this, first open this 'MSProject-Optimal-Trace-Map-Holder.mpp' file which is located in the directory 'Optimal Trace Enterprise\export\msproject-detailed' and do the following:

• Select the 'Organizer' menu item from the 'Tools' menu.



- Click on the 'Maps' tab in the Orgranizer dialog, select the three Optimal Trace[™] maps on the right-hand side and then click 'Copy' to copy these maps to the global template.
- Go to 'File/Open' and open the Optimal Trace[™] CSV file that we just exported from Optimal Trace[™].
- When the Import wizard starts, click on the 'Next' button, and on the Map screen choose to use an existing map.
- Choose the SteelTrace Detailed map from the map selection screen and click on 'Finish'.

This should create a new MS Project project using skeleton data imported from your Optimal Trace[™] project.

5 Optimal Trace[™] -> MS Project Mapping

The following data in a Optimal Trace[™] Project is mapped to a MS Project as follows:

Optimal Trace	MS Project
Requirement Package	Task
Requirement	Sub-task of
(Structured or Simple)	Requirement Package
Item in a Simple Requirement Item List	Sub-task of Simple Requirement
Step in a Structured Requirement Main Success Scenario	Sub-task of Structured Requirement
Alternate Scenario	Sub-task of Structured Requirement
Step in Alternate Scenario	Sub-task of Alternate Scenario
Requirement Priority	Priority between the values of 200 -> 1000.
Description for Package, Requirement & Step/Item	Note
Id for Package, Requirement, Step/Item	Text1 (we store unique object id's to facilitate merging into existing projects)

In addition, all Steps/Items are linked in the project, and all Steps have a default estimated duration of 5 days.

These values can be changed by manually editing the script in the profile.

6 Merging Optimal Trace[™] projects into existing MS Project projects

When importing a Optimal Trace[™] project into MS Project, it is possible to 'merge' it into an existing MS Project file. This is handy for when your original Optimal Trace[™] project changes and you want to update your MS Project file with the new requirements.

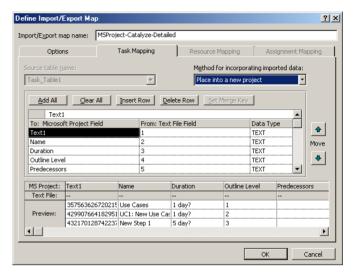
6.1 Merging Optimal Trace[™] Projects into MS Project 2000 projects.

To do this in MS Project 2000, first export your CSV file from Optimal Trace[™] using the 'Project\Export Project...' menu option as above. Open your existing MS Project file in MS Project, and do the following:

 Select 'Project/Open' and open the CSV file that we've just exported from Optimal Trace[™]. This should launch the 'Import Mapping' dialog box, your screen should look something as follows:

Import Mapping		<u>?</u> ×
Import File: C:\temp\MSProject-Cal	alyze-Detailed.csv	🗢 🗙 Iools 🔹
Entire Project	Selective Data	
Import/export map:		
Who Does What "report Compare to Baseline Cost data by task Default task information Earned value information Eng. Map Export to HTML using standard templa MSProject-Catalyze-Detailed Resource "Export Table" map Task "Export Table" map Task ind resource Pivot Table Task list with embedded assignment ro Top Level Task Ist		New Map Edit Copy Organizer
		Open Cancel

• Select the 'Edit' button, and select the 'Task Mapping' tab. Your screen should look something as follows:



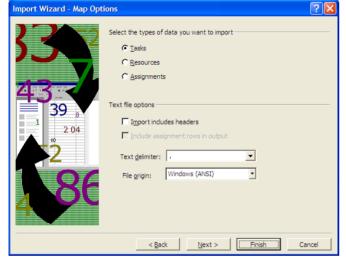
- Under 'Method for incorporating data', select the 'Merge (by key) into current project' option.
- Select the 'Text1' column under 'To: Microsoft Project field', and then select the 'Set Merge Key' button. Your screen should look something like this:

			1	r .		
Optior	ns	Task Mapping	Resource N	lapping A	Assignment Ma	apping
ource table <u>n</u>	ame:		Method f	or incorporating im	ported data:	
Fask_Table1		7	Merge (b	oy key) into curren	t project 💽	
Add All	Clear All	Insert Row De	lete Row Set	Merge Key		
		Insert town		Morgerkey		
Text1	ft Project Field	From: Text	cila cialal	Data 7		
MERGE KEY:		MERGE KEY			Data Type	
Name	16/(1	2				
Duration		3		TEXT		Move
Outline Leve		4		TEXT		÷
Predecessor	s	5		TEXT	-	
MS Project:	Text1	Name	Duration	Outline Level	Predecess	ors
Text File:						
	357563626720215	Use Cases	1 day?	1		
Preview: 42990766418		UC1: New Use Ca:	1 day?	2		
	432170128742237		5 dav?	3	1	

- Select 'Ok', and select 'Open' on the 'Import Mapping' screen, this should merge in the additional details into your MS Project file.
- 6.2 Merging Optimal Trace[™] Projects into MS Project 2002 projects.

To do this in MS Project 2002, first export your CSV file from Optimal Trace[™] using the 'Project\ Export Project...' menu option as above. Open your existing MS Project file in MS Project, and do the following:

- Select 'Project/Open' and open the CSV file that we've just exported from Optimal Trace[™]. This should launch the 'Import Wizard'.
- Choose to use an existing map for import and click 'Next'.
- On the map selection screen choose the MS-SteelTrace-detailed map. Click 'Next'.
- On the import mode screen choose to merge the data into the active project.



 On the map options screen choose to import Tasks, and ensure the text delimiter is set to ',', 'import includes headers' is not checked and that the file origin is Windows (ANSI). Clicking on the 'Next' button will bring you to a screen similar to the following:

mport Wizard - Task Mapp	ing			? 🔀	
Map Tasks Data					
Source table <u>n</u> ame:					
Task_Table1	Ŧ				
, in the second se					
Verify or edit Microsoft Project's as	sumptions for how	you want to map th	ne data		
1				~	
From: Text File Field	To: Microso	oft Project Field	Data Ty		
1	Text1		TEXT	1	
2	Name		TEXT	Move	
3	Duration		TEXT		
4	TEXT	•			
5	Predecesso	rs	TEXT	×	
Add All Clear All	Insert Row Del	ete Row Set Me	erge Key		
Preview					
Text File:					
MS Project: Text1	Name	Duration	Outline Level	Predecessors	
448588521065728	Requirements	irements 1 day? 1			
Preview: 44909263112581	Core Flows - Fully	/ 1 day?	2		
	SR1: Use ATM Ma	a 1 day?	3		
				>	
			1	_	
	< <u>B</u> ac	k <u>N</u> ext >	Finish	Cancel	

• Select the containing 'Text1' and click on the 'Set Merge Key' your screen should look something like this:

Import Wiza	rd - Task Mappi	ing							? 🛛	
Map Tasks Data										
Source table <u>n</u> a	ame:									
Task_Table1			-							
Verify or edit M	icrosoft Project's as	sumptions	for how	vou want	to man th	a data				
	-	sampaons	101 110	you want	to map an	e unto				
	KEY:Text1	-						^		
From: Text File	e Field			ft Project	Field		Data Type			
MERGE KEY:1		ME	RGE KEY:	Text1			TEXT		<u> </u>	
2		Nar	ne				TEXT		Move	
3		Du	ration				TEXT			
4		Ou	tline Leve				TEXT		+	
5						TEXT	~			
<u>A</u> dd All	<u>Clear All</u>	nsert Row	Dele	te Row	<u>S</u> et Me	rge Key				
Preview										
Text File:										
MS Project:	Text1 Name			Duration Outline			Level Pre		decessors	
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Preview:				Flows - Fully 1 day? 2						
	449556094711964 SR1: Use ATM Ma 1 day? 3				3					
			< <u>B</u> ack		<u>N</u> ext >		Einish		Cancel	

• Now click on the 'Finish' button to complete the import process.