SERENA®

DIMENSIONS® RM 2010 R1

Integration Guide for Microsoft® Project

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Contents

Preface

This document describes the Serena® Dimensions® RM integration with Microsoft® Office Project Professional.

The instructions in this document outline how to import data from Microsoft Project into the Dimensions RM database, update project data in Dimensions RM, and export the data back into Microsoft Project. These instructions assume that you are familiar with Microsoft Project. If not, consult the documentation provided by Microsoft. These instructions also assume that you know how to manipulate Dimensions RM project information. If not, consult the *Serena Dimensions RM User's Guide* and the *Serena Dimensions RM Administrator's Guide*.

These instructions assume that both Microsoft Project and Dimensions RM are already installed on your system. See the *Serena Dimensions RM Installation Guide* for information on installing Dimensions RM.

The instructions in this document are provided by Serena Software, Inc. for illustrative purposes only. The instructions have been verified only for Microsoft Office Project Professional 2003 as made available to Serena. Other versions of Microsoft Project may integrate with Dimensions RM in a similar manner, or a different manner, or not at all.

Serena makes no representations or warranties regarding Microsoft Project, that the instructions are valid, or that the instructions are applicable to any other version of Microsoft Project.

The instructions do not replace the documentation provided by Microsoft for Microsoft Project. The documentation for Microsoft Project should be your primary source of information regarding Microsoft Project.

Objective

The purpose of this book is to describe how to integrate Dimensions RM with Microsoft Project.

Audience

This document is intended for members of project teams who use Dimensions RM to create, manage, and track requirements during the lifecycle of a project.

Manual Organization

The single chapter in this document describes how to integrate Dimensions RM and Microsoft Project.

Integrating Dimensions RM and Microsoft Project

Integrating Serena® Dimensions® RM and Microsoft® Project lets you show traceability between the schedule information in your project and the other data that is stored in Dimensions RM.

The integration provides the following capabilities:

- Tracing a particular task through its entire life cycle
- Justifying a particular life cycle activity by showing its relationship to a currently scheduled task
- Performing detailed schedule tracking and impact analysis

The integration includes the following steps:

Exporting Data from Microsoft Project

IMPORTANT! Before you can save to a CSV file, you may need to set an option to allow Microsoft Project to save to legacy file formats. To do this, select Tools | Options. Then, on the **Security** tab, select the **Allow loading files with legacy or non default file formats** option under **Legacy Formats**.

To export data from Microsoft Project:

1. Start Microsoft Project and open an existing project that contains data that is ready to be transferred to Dimensions RM.
2. Select **File** > **Save As**. The **Save As** dialog opens.
3. Enter a file name in the **File name** list.
4. Select **CSV (Comma delimited)** in the **Save as type** list.
5. Click **Save**. The Export Wizard starts. Click **Next**.
6. Select **New Map** and click **Next**.
7. The Map Options screen opens. Do the following:
   - Under **Select the types of data you want to export**, select **Tasks**.
   - Under **Text file options**, select the **Export includes headers** check box.

8 Click **Next**. The Task Mapping screen opens.

9 Map the items in the **From: Microsoft Office Project Field** column to the corresponding items in the **To: Text File Field** column. These names are exported as the titles of the data columns on the first row of the CSV file.

NOTE The mapping should include all columns in your Microsoft Project project, plus the Unique ID item.

10 Click **Next**. The End of Map Definition screen opens.

11 Click **Save Map**.

12 In the **Map Name** field, enter a name for the map.

13 Click **Save**.

14 Click **Finish** when you have finished mapping items. The exported data is saved in a CSV file.

IMPORTANT! You may need to set an option to allow Microsoft Project to save to legacy file formats. To do this, select Tools | Options. Then, on the **Security** tab, select the **Allow loading files with legacy or non default file formats** option under **Legacy Formats**.

You can view the CSV file in any text editor, or in Microsoft® Excel.

15 Close Microsoft Project. If you are prompted to save changes to the project, click **Yes**.

Configuring a Schema in Dimensions RM

To configure a schema in Dimensions RM:

1 In RM Manage, select an existing project or create a new project.

2 Select **File** > **Define Project Schema**. The Class Definition tool opens.

3 Add a Schedule class to the project.

4 Activate the Schedule class, if not already activated. To do so, perform the following steps:

   a Right-click an empty space in the schema diagram.

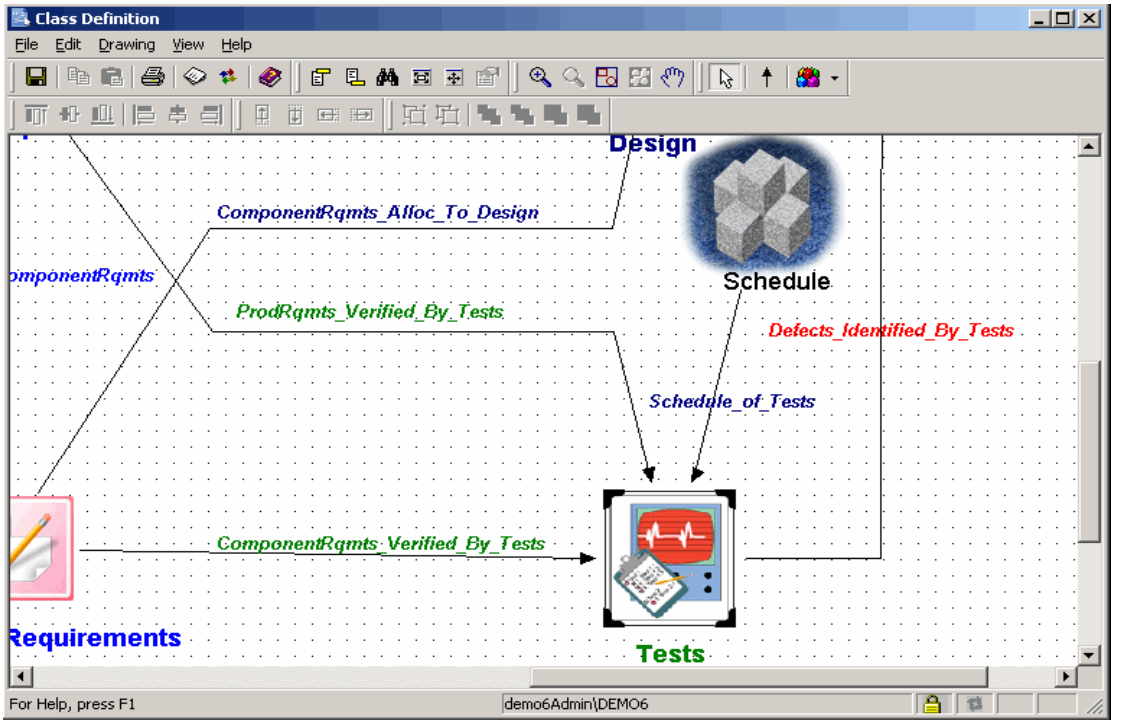
   b Select **Add Class > Manage class types**. The **Manage Class Types** dialog opens.

   c Select **Schedule** and then click **OK**.

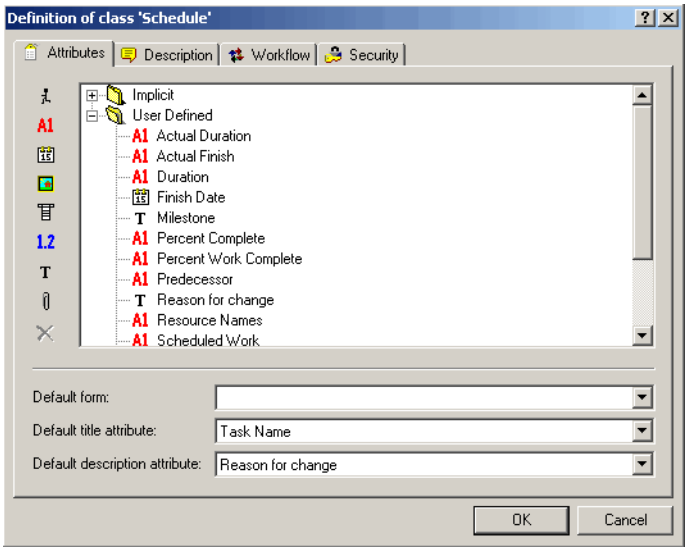
5 Add relationships between the Schedule class and other pertinent classes.

   For example, you could create a relationship between the Schedule class and the Tests class. Relationships are intended to show the schedule requirements (cost, duration, task name, and resource) for the products the tasks are associated with.

The following illustration shows a portion of the schema diagram that contains the Schedule class and its relationship to the Tests class.



6 Double-click the **Schedule** class in the schema diagram. The **Definition of class** dialog opens.



7 Add attributes to the Schedule class that correspond to the fields in the CSV file generated from Microsoft Project, and delete attributes that do not correspond to

fields in the CSV file. These are the attributes into which data will be mapped from fields in the CSV file.

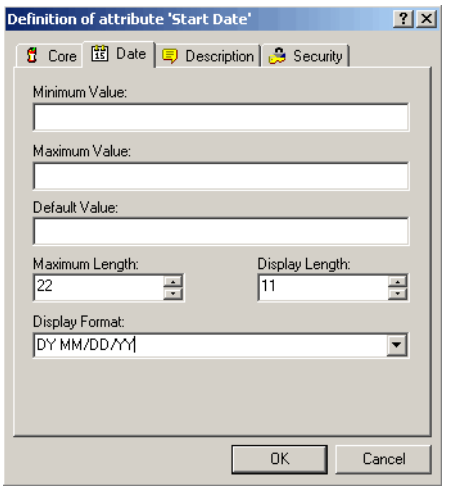
NOTE Use alphanumeric (not numeric) attributes wherever a numeric value is to be stored. This prevents Dimensions RM from transforming numeric decimal values into mathematical equivalents that may not be recognized correctly by Microsoft Project during future transfers. An example of such an attribute is an Outline_Number attribute with a value of 1.2.

8 Change the date format to match the Microsoft Project date format. To do so, perform the following steps:

a In the **Definition of class** dialog, double-click the **Start Date** attribute.

b Click the **Date** tab.

c In the **Display Format** field, type **DY MM/DD/YYYY**.



d Repeat this procedure for the **Finish Date** attribute, and for any other attributes that contain date data.

9 Edit the Schedule class attribute list to add an Alpha Numberic attribute (A1) with the name Unique ID, as well as any other attributes to store additional Microsoft Project data. The Unique ID field will store the Project Unique ID to allow for consistent data exchange with Mcirosoft Project.

10 Select **File** > **Save** to save the project schema.

Importing Data into Dimensions RM

NOTE In the procedures in this section, all data will be imported into the same class. However, subsets of project data from the same CSV file can be imported into different Dimensions RM classes.

Importing Data from the CSV File with RM Browser

To import data from the CSV file:

1. On the Home view, click the **CSV Import** button. The CSV Import dialog box appears.
2. In the File Name field, enter or browse to find the CSV file you want to import.
3. To create new requirements, select **Create** from the **Import Mode** list. You can also replace attributes in existing requirements with values from the CSV file. For more on import options for CSV files, see the Dimensions RM User's Guide.
4. From the **Field Separator** list choose **Comma**.
5. To limit the range of rows to import, select **From** from the **Rows to Be Imported** option and enter the range. Otherwise, leave **All** selected to imported data from all rows in the file.
6. Select the **File has header row** option.
7. From the **Log Level** list you can choose the level of detail in the summary report that displays after you start the import. Choose **Terse** or **Verbose**.
8. Under the **RM Mapping** heading, you must enter criteria to define how data from the CSV file will be imported to Dimensions RM. When you use the Create Import mode, you must map columns from the CSV file to requirements attributes in RM. Data from the columns you select will be imported to the attributes you map the columns to, in the new requirements. First select the requirements class from the **RM Class** field. Then, select the column from the **CSV Column List** field and the corresponding attribute from the **RM Attribute** field. Click the right arrow button to add the mapped pair to the **Mapped List** field.
9. Click **Import** when you have completed the mapping.

Importing Data from the CSV File with RM Concept

To import data from the CSV file:

1. In RM Concept, select **File** > **Import CSV Data**. The CSV Wizard starts.

NOTE Make sure that the Schedule class is not currently in use by other Dimensions RM users. If it is, some class objects could be locked, resulting in import problems.

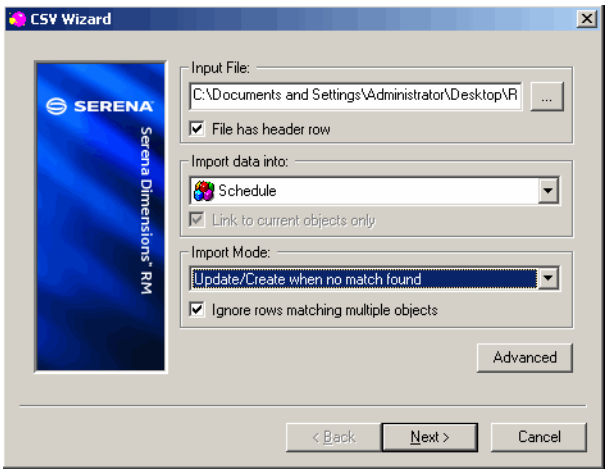
2. In the first wizard screen, do the following:

a In the **Input File** box, browse to the CSV file you saved earlier in Microsoft Project. Select the file and then click **Open**. Make sure that **File has header row** is selected.

b In the **Import data into** drop-down list box, select the **Schedule** class.

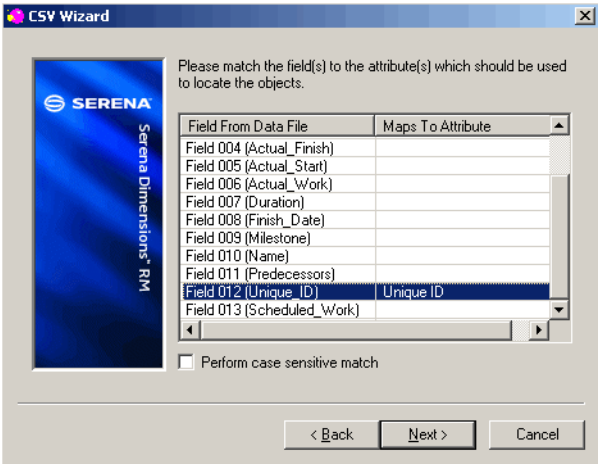
c Under **Import Mode**, select **Update/Create when no match found**.

d Select the **Ignore rows matching multiple objects** check box.



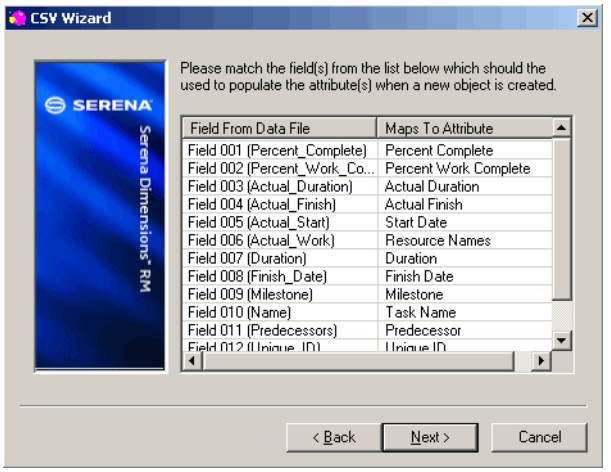
3 Click **Next** to advance to the next wizard screen.

4 Select **Unique ID** to identify a unique search key to find matching Dimensions RM objects, and click in the associated **Maps to Attribute** cell to select the Dimensions RM attribute that will map to Name.



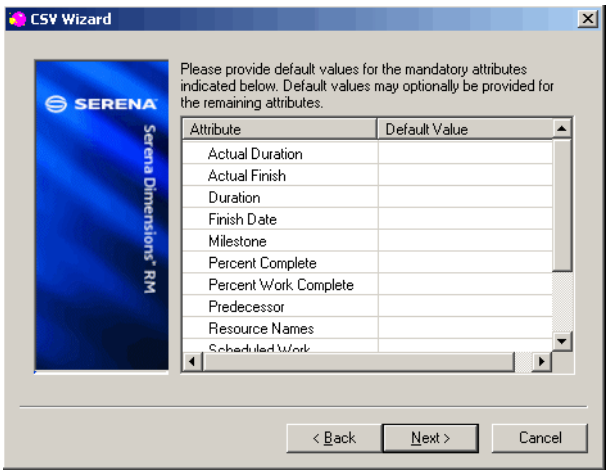
5 Click **Next** to advance to the next wizard screen.

6 The mapping between the CSV file columns and the associated object attributes are displayed. If this is not the desired mapping, adjust it by selecting the correct Dimensions RM attributes in the **Maps to Attribute** column.



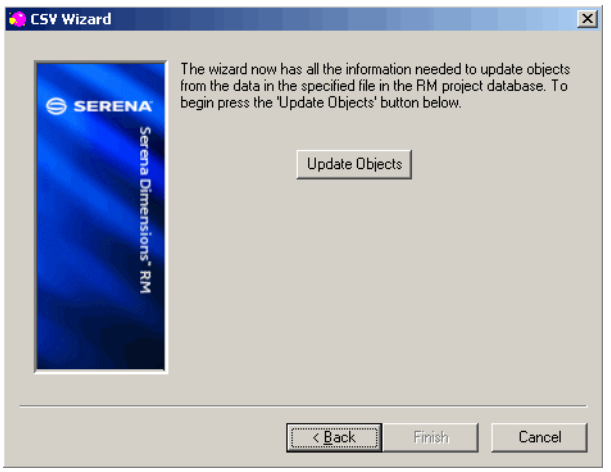
7 Click **Next** to advance to the next wizard screen.

8 Enter a value in the **Default Value** column for each mandatory field. Mandatory fields are indicated by a green icon.



9 Click **Next** to advance to the next wizard screen.

10 Click **Update Objects**.



11 When the the update object process finishes, click **Finish**.

NOTE Errors in the import process are recorded in a temporary log file. Click **View Log File** to open the log file.