

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:

ganizer		?
Forms	Tables	Filters
Views	Reports	Modules
Fields	Groups	
Calendars	Toolbars	Maps
GLOBAL MPT: "Who Does What" report Compare to Baseline Cost data by task Default task information Erned value information Eng. Map Export to HTML using standard tem Resource "Export Table" map Task "Export Table" map Task and resource Pivot Table Task and resource Pivot Table Task lask sist Maps available in:	Cancel Cancel Cancel Delete Delete	Project-Catalyze-Map-Holder.mpp': Project-Catalyze Project-Catalyze-Detailed
		_
GLOBAL.MPT	MSI	Project-Catalyze-Map-Holder.mpp 🔹

- 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.

Forms	Tables		Filters	
Views	Reports		Modules	
Fields	Groups			
Calendars	Toolbars		Maps	
Slobal.MPT':		'MSProject-Catal	/ze-Map-Holder':	
Who Does What' report Compare to Baseline Cost data by task Pefault task information Samed value information Samed value information Task cours of table "map Task short to HTML using "map Task short hot metaded assignment rows Top Level Tasks list	< <u>Copy</u> Cancel Rename Delete	MSProject-Catal MSProject-Catal MSProject-Catal	/ze-Actors	~
laps a <u>v</u> ailable in:		Maps availa <u>b</u> le in		
Global.MPT	-	MSProject-Catal	vze-Man-Holder	

- 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:

port Mapping		?)
nport File: C:\temp\MSProject-Cat	alyze-Detailed.csv	🗢 🗙 Icols 🔻
Entire Project	Selective Data	
Import/export map:		
"Who Does What" report Compare to Baseline		<u>New Map</u>
Cost data by task		Edit
Default task information Earned value information		
Eng, Map		⊆ору
Export to HTML using standard templa	e	
MSProject-Catalvze-Detailed Resource "Export Table" map		
Task "Export Table" map		Organizer
Task and resource PivotTable		
Task list with embedded assignment ro Top Level Tasks list	WS	
TOP LEVEL LASKS IISC		
1		Y
		Open Cancel

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

port/E <u>x</u> port m	ap name: MSPro	ject-Catalyze-Detail	ed				
Optior	ns	Task Mapping	Resource	Mapping	Ass	ignment M	apping
iource table <u>n</u>	ame;		Method	for incorpora	ating impo	rted data:	
Task_Table1		~	Place in	nto a new pri	oject	-]
Add All	Clear All	Insert Row De	lete Row Se	t Merge Key	1		
Text1					-	_	
To: Microso	ft Project Field	From: Text	: File Field		Data Typ	e 🗌	
Text1		1			TEXT		•
Name		2			TEXT		Move
Duration		3			TEXT		
Outline Leve	:	4			TEXT		-
Predecessor	5	5			TEXT	-	
MS Project:	Text1	Name	Duration	Outline Le	evel	Predeces	sors
Text File:							
	35756362672021	Use Cases	1 day?	1			
Preview:	42990766418295	1 UC1: New Use Ca:	1 day?	2			
4	43217012874223	New Step 1	5 day?	3		l	
<u> </u>							<u> </u>

- 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:

Option	ns	Task Mapping	Resourc	e Mapping	A	ssignment	Mapping
ource table <u>n</u>	ame:		Metho	d for incorpor	ating imp	ported data	a:
Fask_Table1		7	Merge	e (by key) into	o current	t project	-
Add All	Clear All	Insert Row De	lete Row S	iet Merge Key	1		
Text:					_		a
	ft Project Field	From: Text	: File Field		Data T	vpe	11
MERGE KEY		MERGE KE			-	(P-	- -
Name		2	Т		TEXT		Move
Duration		3	TE		TEXT		
Outline Leve	el .	4			TEXT		
Predecessor	's	5			TEXT	-	·]
MS Project:	Text1	Name	Duration	Outline L	evel	Predece	ssors
Text File:							
	357563626720215	Use Cases	1 day?	1			
Preview:	429907664182951	UC1: New Use Cas	1 day?	2			
	432170128742237	New Step 1	5 day?	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.

mpore maard - map ope	
33 43 39 1 204 204 204	Select the types of data you want to import
	< Back Next > Finish Cancel

 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 Wiza	rd - Task Mappi	ing							?
1ap Tasks Data	a								
Source table <u>n</u> a	ame;								
Task_Table1			-						
erity or edit M	icrosoft Project's as	sumption	s for now	you want	to map tr	e data -			
1		-						^	
From: Text Fil	e Field		: Microso	ft Project	Field		Data Typ	e [
1			ext1				TEXT		-
2			ame				TEXT		Move
3			uration				TEXT		
4		0	utline Leve				TEXT		+
5		Pr	edecessor	S			TEXT	×	
Add All	Clear All I	nsert Ro	w Dele	te Row	Set Me	erae Kev	1		
							_		
review									
Text File:									
MS Project:	Text1	Name		Duration		Outline	Level	Predece	essors
	448588521065728	Require	ments	1 day?		1			
Preview:	Preview: 449092631125812 Core			e Flows - Fully 1 day? 2					
	449556094711964	SR1: Us	e ATM Ma	1 day?		3			
<									>
				1		1 500			
			< <u>B</u> ack		$\underline{N}ext >$		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	ng			? 🛛
Map Tasks Data Source table na Task_Table1	ame:	Ţ			
	KEY:Text1		ow you want to map t		<u> </u>
MERGE KEY:1	e Held		osoft Project Field (EY:Text1	Data Typ TEXT	pe 🔒
2		TEXT	Move		
3		TEXT	+		
5		TEXT	<u> </u>		
<u>A</u> dd All	<u>C</u> lear All <u>I</u> r	nsert Row	Delete Row Set M	erge Key	
Preview					
Text File:					
MS Project:	Text1	Name	Duration	Outline Level	Predecessors
	448588521065728	Requirements	1 day?	1	
Preview:	449092631125812			2	
<	449556094711964	SR1: Use ATM	Ma 1 day?	3	
		< 5	ack <u>N</u> ext >	Einish	Cancel

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