



Compuware
Optimal Trace™

Optimal Trace™ – MS Project Integration

March 2007

Copyright 2007 Compuware Limited. This document is the copyright of Compuware Limited and may not be reproduced in whole or in part without the consent of Compuware Limited.

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).

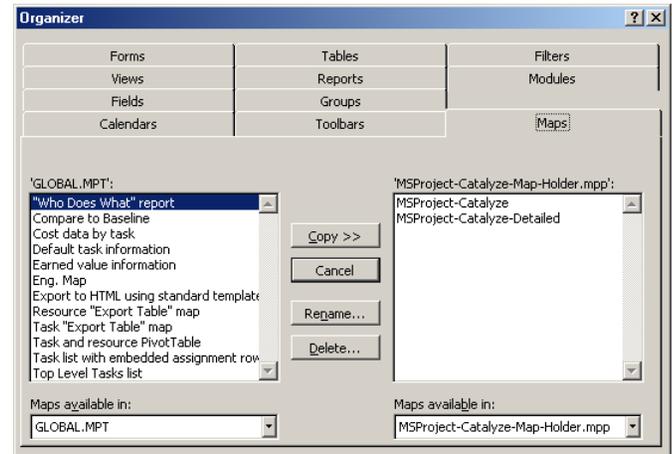
3 Configuring MS Project 2000

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:



- 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.

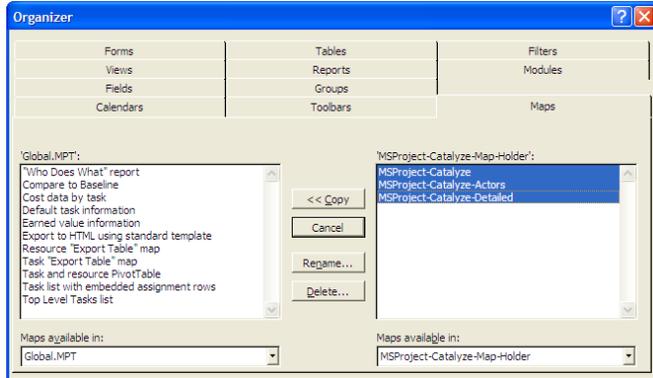
4 Configuring MS Project 2002

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 Organizer 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 (Structured or Simple)	Sub-task of 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.

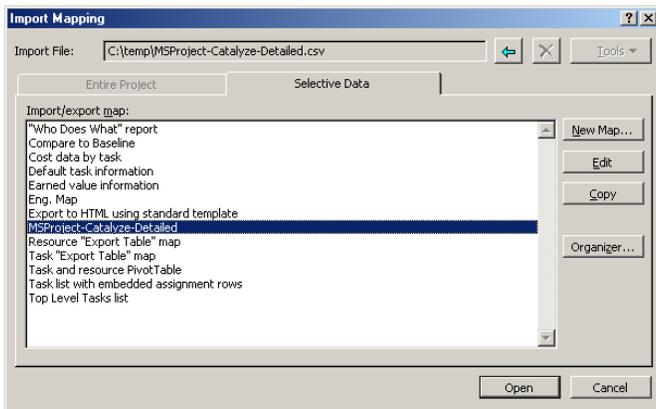
6 Merging Optimal Trace™ projects into existing MS Project projects

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.

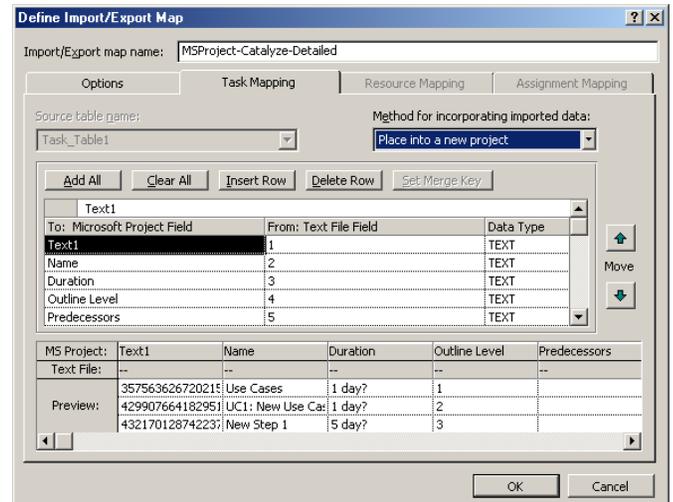
6.1 Merging Optimal Trace™ Projects into MS Project 2000 projects.

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:

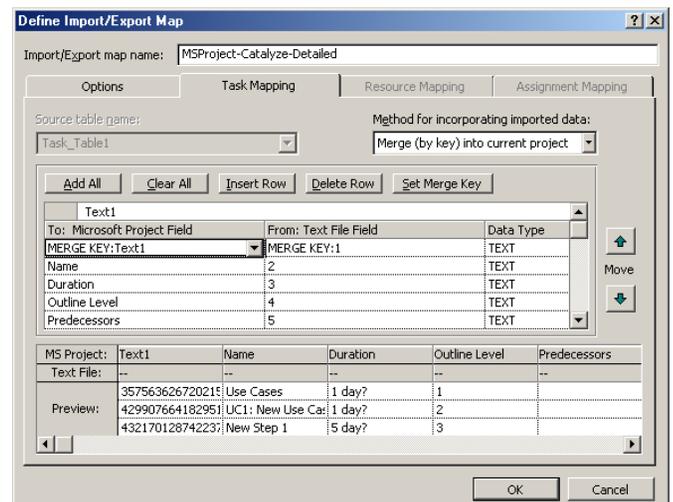
- Select 'Project/Open' and open the CSV file that we've just exported from Optimal Trace™. This should launch the 'Import Mapping' dialog box, your screen should look something as follows:



- 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:

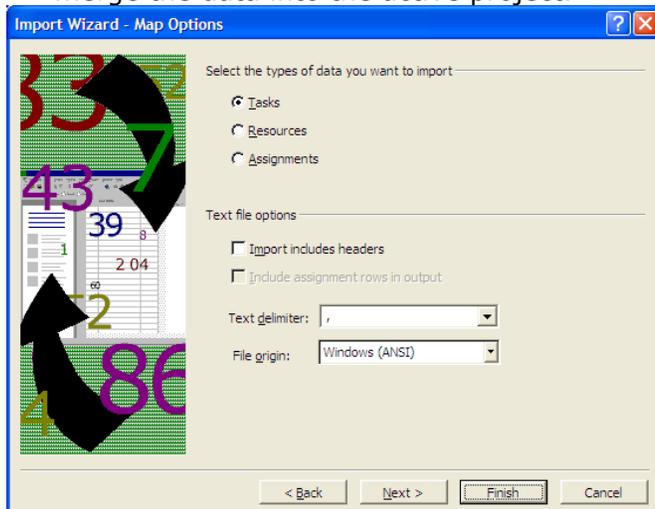


- Select 'Ok', and select 'Open' on the 'Import Mapping' screen, this should merge in the additional details into your MS Project file.

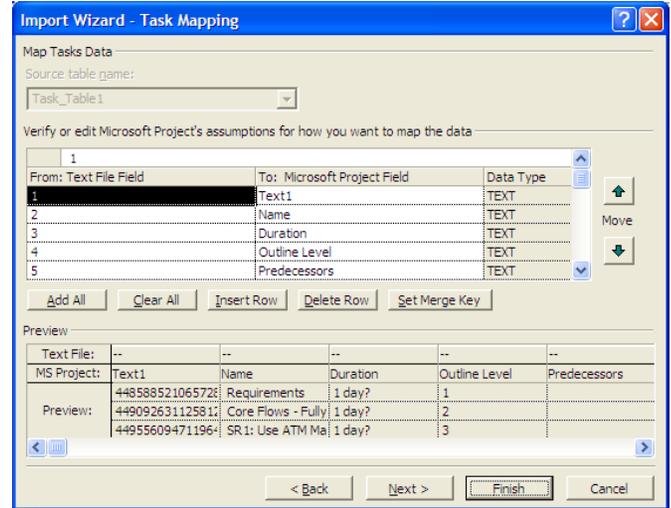
6.2 Merging Optimal Trace™ Projects into MS Project 2002 projects.

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:

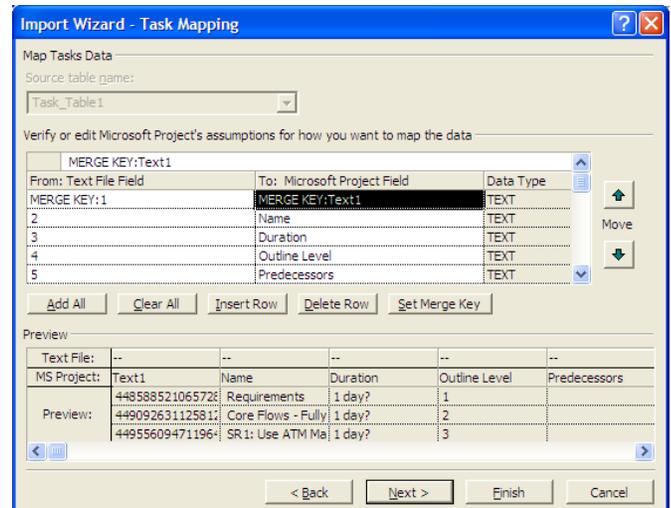
- Select 'Project/Open' and open the CSV file that we've just exported from Optimal Trace™. This should launch the 'Import Wizard'.
- Choose to use an existing map for import and click 'Next'.
- On the map selection screen choose the MS-SteelTrace-detailed map. Click 'Next'.
- On the import mode screen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



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



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