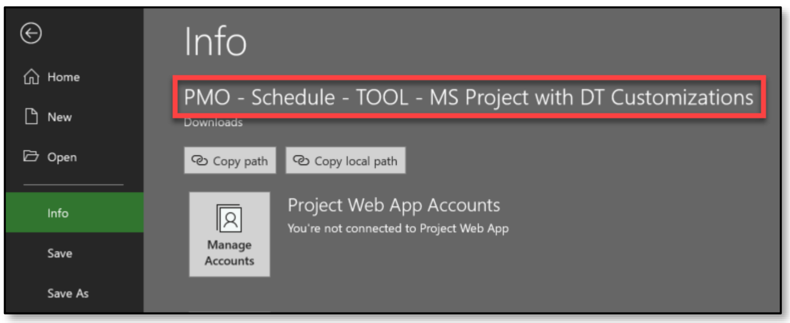
Setting up Standard / Required Custom Fields

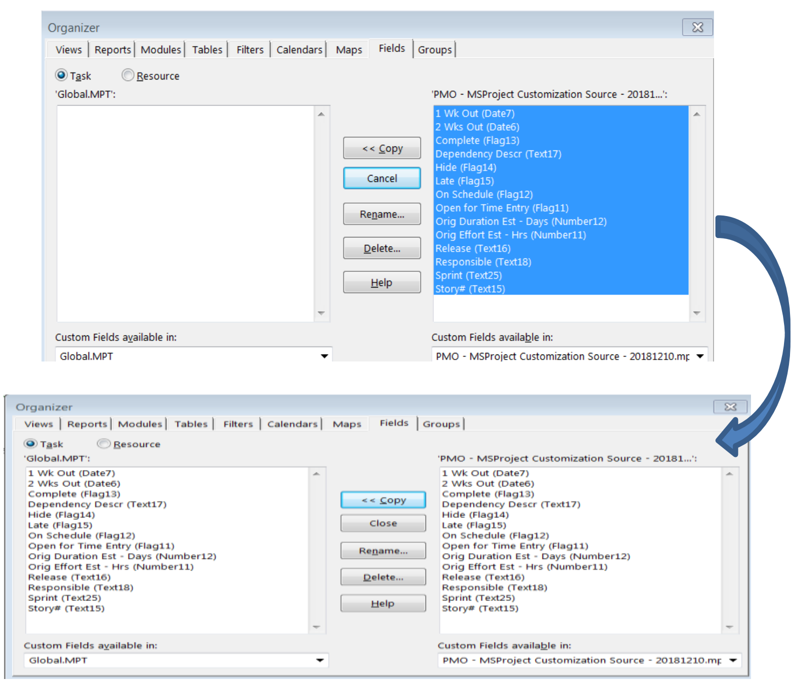
The following the steps must be completed to ensure custom mapped fields are in place in your instance of MS Project.

Once you establish these fields in your Global Template, they will be available for every new project file you open. If you add Custom Fields other than these, they are not retained once you upload your plan to CA PPM. It is recommended that you use only the Custom Fields in the Global.MPT.

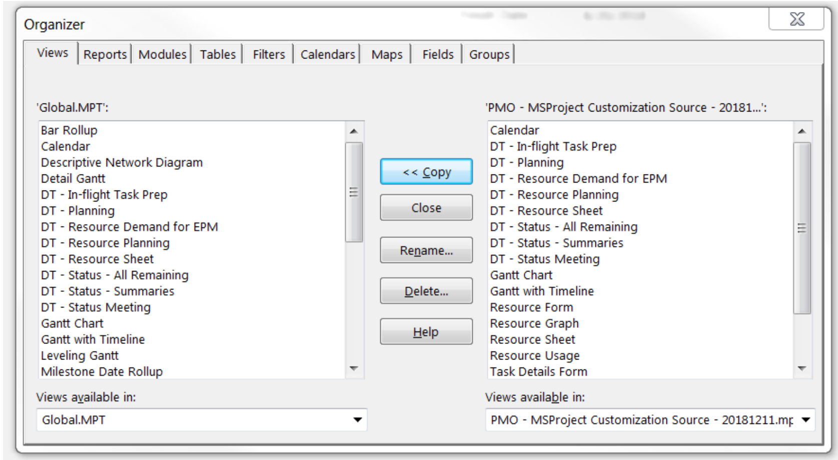
1. Open the most recent 'PMO - Schedule - TOOL - MS Project with DT Customizations' Microsoft (.mpp) Project file.
2. File>>Organizer button



3. Select 'Fields' tab and select all fields in right hand box.
   Note: The fields in the screenshot below may not reflect all of the fields in the current source file.



4. Select the 'Views', 'Tables' and 'Filters' tabs and copy over all the customized items for each tab. They are prefaced with "DT- ". This is an example of the Views tab:

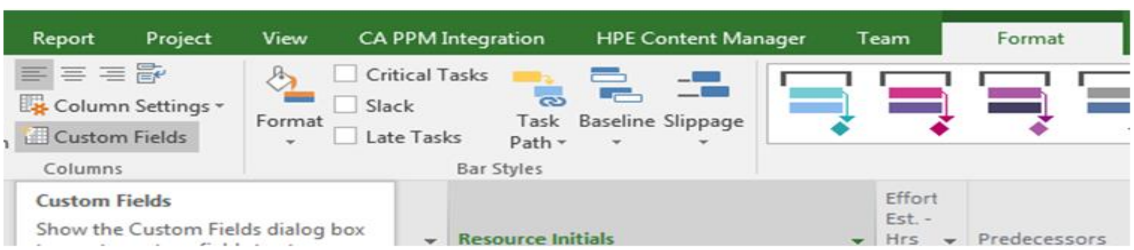


5. Once you have performed this for each tab, close the Organizer window and return to the file
6. Close the source file without saving
7. Finally, open your MS Project Plan(s) and repeat steps 2-6 but copying the fields from your Global Template to each of your MS Project files

Relocating Current Data to Standard Fields

If you have an existing MS Project file in which you have custom fields defined, they need to align with these instructions. Essentially, we are ensuring CA–reserved custom fields are not being used and any custom fields you have are in the correct standard MSP-to-CA mapped fields. These mapped fields are the only custom fields that will exist once your upload is completed.

1. In MSP Gantt view go to the format tab and select 'custom fields'

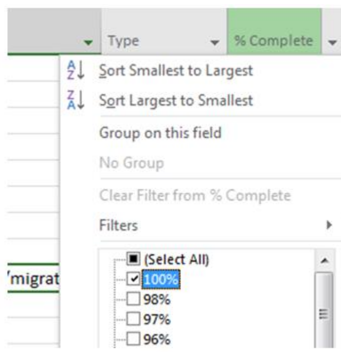


2. In the custom fields window
    a. For type 'Text', delete any of **your** custom fields that you do not need to copy into a newly mapped field
    b. For type 'Date', delete anything below Date6
    c. For type 'Flag', delete any of **your** custom fields that you do not need to copy into a newly mapped field
    d. For type 'Number', delete any of **your** custom fields that you do not need to copy into a newly mapped field
3. Using a Gantt view *that is not a DT custom view*, insert one of your custom fields that has data to be copied.

4. Insert the corresponding standard mapped field next to your custom field
5. Ensure your list of tasks/outline is unfiltered and expanded
6. Select all the value fields for your custom field, copy, and paste into the standard column
7. Repeat steps 4 through 6 for each of your custom fields that correspond to standard fields.
8. Repeat steps 1 and 2 to delete any remaining non-standard fields
    a. Make sure to delete any duplicates you added

Set Required Task Type for Completed Tasks:

1. Set your view to be “DT – In-Flight Task Prep”
   Note: This view is only available if you did step 4 under Setting Up Standard Fields.
2. With entire project expanded, filter on % Complete for 100%

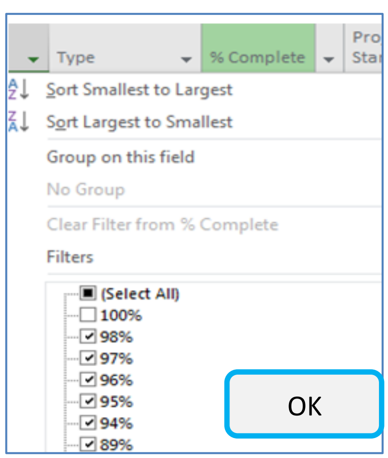


3. For each task, ensure the Type is set to Fixed Duration. You can drag Fixed Duration down if needed and the formatting of other fields should not be effected.
   NOTE: If you receive an error message or dialog box indicating an error, just click OK
4. Save

Eliminating In-flight Tasks

CA requires the initial load have only tasks that are either 0% or 100% complete.

1. In the DT – In-Flight Task Prep view, on the % Complete field, Select All, and then deselect the 100% and 0% tasks.



Click OK

Do the following for each in-flight task:

2. Copy the entire task row and paste immediately below

Name	Type	% Complete	Projected Start	Projected Finish	Duration	Actual Work	Remaining Work	Actual Start	Actual Finish	Predecessors
Revise test automation for STG - DTD / SPOS	Fixed Duration	85%	11/5/18	12/14/18	32 days	21.76 hrs	3.84 hrs	11/5/18	NA	328
Revise test automation for STG - DTD / SPOS	Fixed Duration	85%	11/5/18	11/23/18	17 days	11.56 hrs	2.04 hrs	11/5/18	NA	328

Name	Type
Revise test automation for STG - DTD / SPOS (pre-CA)	Fixed D
Revise test automation for STG - DTD / SPOS	Fixed D

3. Add Actual Finish Date to the original task
   Remaining Work should go to 0
   Optional: You may also want to append "(pre-CA) in the name of the original task.

Remaining Work	Actual Start	Actual Finish	Pred
0 hrs	11/5/18	12/14/18	328
2.04 hrs	11/5/18	NA	328

4. Note remaining work on "new" task

Actual Work	Remaining Work
25.6 hrs	0 hrs
11.56 hrs	2.04 hrs

5. Remove Actual Start from the new task
   Remaining Work now includes what was in Actual Work.

Actual Work	Remaining Work	Actual Start	Act
25.6 hrs	0 hrs	11/5/18	
0 hrs	13.6 hrs	NA	

6. Change to original Remaining Work amount.
7. You will see the new task's Predecessor is the same as the original task. Change it to be the original task itself.

Name	Type	% Complete	Projected Start	Projected Finish	Duration	Actual Work	Remaining Work	Actual Start	Actual Finish	Predecessors
Revise test automation for STG - DTD / SPOS (pre-CA)	Fixed Duration	100%	11/5/18	12/14/18	32 days	25.6 hrs	0 hrs	11/5/18	12/14/18	328
Revise test automation for STG - DTD / SPOS	Fixed Duration	0%	12/15/18	1/10/19	17 days	0 hrs	2.04 hrs	NA	NA	329

8. Ensure Duration is set so (Projected) Finish is appropriate.

Projected Finish	Duration	A
12/14/18	32 days	2
12/21/18	5 days	0

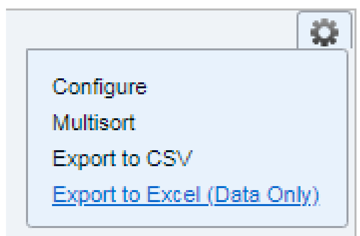
Ensure Resource Initials Match CA's Resource ID

This must be done to avoid losing the assignments during the upload or the upload failing entirely

First, export the current resource list from CA.

1. In CA, hover over Home and select Resources

2. Click Show All to ensure there are no filters in place.
3. In the upper right corner of the filter box, click on the settings gear and select Export to Excel



4. Once downloaded to your particular download location, open
5. You will likely receive a message about the file extension not matching, click Yes.
6. From there you can adjust the columns, sorting to be whatever works best for you.
7. Once you have the export, you need to change the Resource Initials in your MS Project file
8. Go to the Resource Sheet view in your MS Project file.
9. Insert the Resource Initials column if it is not there.
10. Locate each person in your Resource Sheet in the export file and, in the project file, change their Initials to the Resource/Role ID (employee ID number)
11. If any of your resources are not in the extract, send a request to PPMAdmin to add them, using the format in the form below. ALL RESOURCES NEEDED FOR YOUR PROJECT MUST BE IN THE CA PPM TOOL BEFORE UPLOADING.

First	Last	RID	Email	Manager	Type
Brian	Perry	169890	brian.perry@discounttire.com	Tom Socha	Contractor
Stephen	Osentoski	158499	stephen.osentoski@discounttire.com	Mike Moore	Contractor
Gladys	Trevino	173174	gladys.trevino@discounttire.com	Tasha Atou	Employee
John	Kniffen	163232	john.kniffen@discounttire.com	Andy King	Employee
Cheryl	Carter	158344	cheryl.carter@discounttire.com	John McPherson	Employee

EXAMPLE

12. Once you are notified the resources have been added, repeat steps 1 - 9 for those resources.