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MSP | Ongoing Use Tips & Tricks

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Agenda

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Introductions

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Part I: Introduction

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Why Integrate MSP with CA PPM?

- Full bidirectional connection between CA PPM and MSP
- Stop relying on multiple spreadsheets and applications for data
- Real-time progress updates on MSP project schedule through CA PPM Timesheets
- Repeatable processes and centralized data are essential in providing accurate reports and actionable metrics
- MSP is an industry standard and widely used by most Project Managers

Projects

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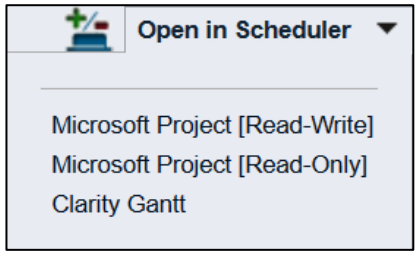
Open A Project Schedule

From CA PPM…

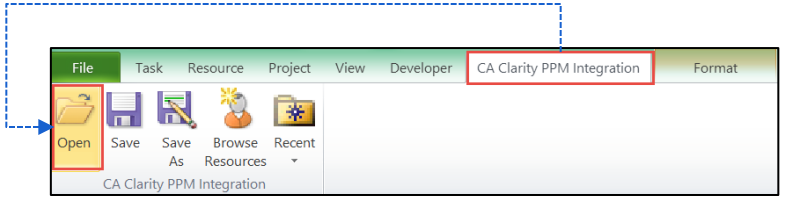
Choose either (Read-Write) or (Read-Only) from the Project > Properties or Tasks tab:



The CA PPM “Scheduler Format” in Project > Properties needs to be set to “Microsoft Project”

From MSP…

Choose “Open” from the CA PPM Integration menu:



You may be asked to login to CA PPM*

Choose the project from the “Open from Clarity” selection box

Open A Project Schedule – Legacy Driver

When opening a project schedule from CA PPM to MSP, the following occurs:

- If the project was previously saved from MSP to CA PPM, the latest ".mpp" file from the CA PPM database is downloaded and will overwrite/copy the ".mpp" file to the local drive
- The MSP schedule will then be updated with any data changes that were made directly in CA PPM since the ".mpp" file was last saved.
  - Actuals Posted from Timesheets
  - Task Level Updates
  - Project Team Updates
  - Resource Assignment Updates

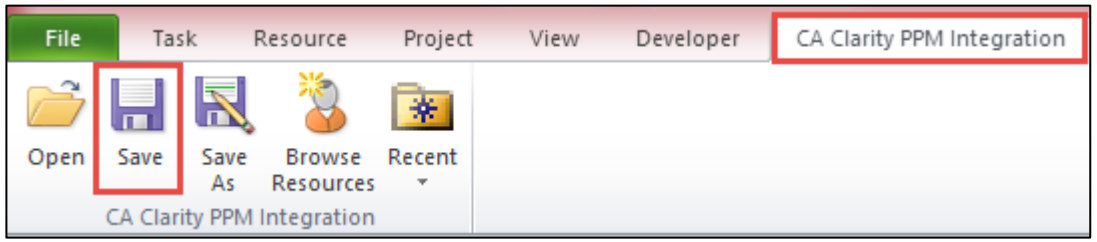
Open A Project Schedule – XML Driver

When opening a project schedule from CA PPM to MSP, the following occurs:

- If the project was previously saved from MSP to CA PPM, the saved “XML” file from the CA PPM database is downloaded and then updated with any data changes that were made directly in CA PPM since the last save
  - Actuals Posted from Timesheets
  - Task Level Updates
  - Project Team Updates
  - Resource Assignment Updates
- The XML is then opened and a new MPP is generated in your default save location along with the new XML file that was created

Save A Project Schedule

The “Save” button will save your MSP Project Schedule back to CA PPM:

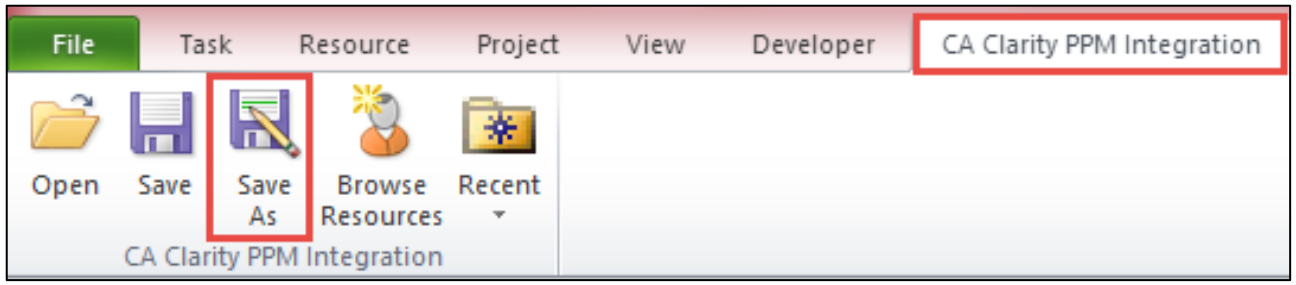


When an MSP schedule is saved to CA PPM, with the Legacy Driver the MPP is saved in the DB. If using the XML driver a zip of the mpp and XML is saved to the CA PPM database where all unmapped fields and global settings are preserved

Save A Project Schedule

The “Save As” button will allow you to:

- Save copies of existing CA PPM Projects as New Projects in CA PPM (Save As)
- Save new projects to CA PPM from MSP (Save As)



Note: The NEW XML version of the MSP Interface will NOT allow you to use “Save As” to save a schedule over an existing CA PPM project

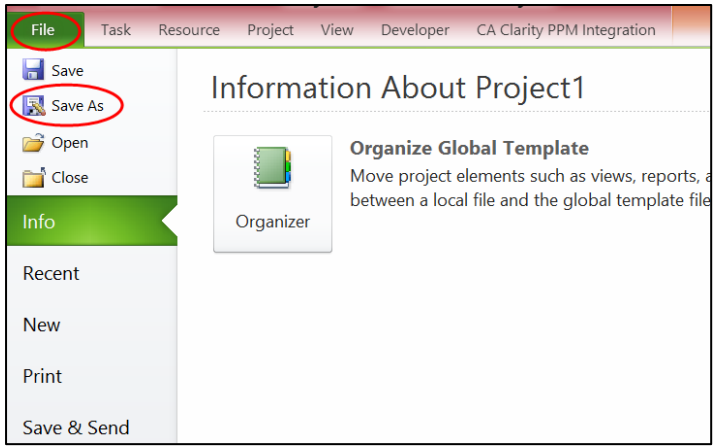
What Data Is Saved From MSP To CA PPM

All Task and Assignment data in MSP is saved back to CA PPM, EXCEPT:

- New Charge Codes
- Actual Hours (if track mode is set to PPM)
- Unplanned Tasks and Assignments – Tasks with hours, but no resource assignment
- Manual edits to the Baseline

MSP Working Copies

- If you would like to work on the project schedule offline or disconnected from CA PPM, you can:
  - Open the Project from CA PPM to MSP in Read/Write mode
  - From the MSP file menu, click File > Save As and select a location on your local hard drive
  - Exit out of MSP



- You can now work on the project schedule that was saved to your local drive
  - CA PPM will maintain a lock on the project until it is successfully saved back to CA PPM
- When you're ready to save it back to CA PPM, open the file and click on "Save" under the CA PPM Integration Toolbar
  - You may need to log back into CA PPM

Master And Subprojects

- The Master Project should be created as a “shell” in CA PPM. Do not add staff to the Project Team, create tasks or track actuals in the Master Project
- Create or identify the Sub-Projects and add them to the Master Project from Project > Properties > Subprojects
- Add many subprojects to a master project - MSP have a 50 project limit – master and 49 subs

Master Projects in MSP

- When a Master Project is opened from CA PPM to MSP, all related sub-projects are also opened – up to 49
- Resources from all sub-projects are merged and added to the Master Project's resource sheet in MSP, but are not copied back to CA PPM when saved
- If there are no assignments for a particular team member, they are removed from the sub-project's team when saved to CA PPM
- Sub-Project schedules can be opened and worked on independently

Baselines

Baselines can be created in either CA PPM or in MSP

- CA PPM supports unlimited baselines
- MSP supports 11 baselines

In MSP, go to Tools > Tracking > Save Baseline

In CA PPM, go to Projects > Properties > Baseline

Cost Data

Cost Information in MSP is retrieved from the Financial Cost Matrix in CA PPM. Cost rates determine the cost that is associated with a resource assigned to a task

Costs are shown over time by Task and at the Project Level

Any changes that are made to cost rates directly in MSP are for “What-if” purposes only and WILL NOT be saved back to CA PPM

Resources

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Resources

Resources should be staffed to the project in CA PPM before the project schedule is opened in MSP

Resource and Calendar Data should be updated and maintained in CA PPM. Changes made in MSP will not be copied back to CA PPM. This does not apply to Resource Assignment information on Tasks.

Allocation, Max Units and Assignment Units

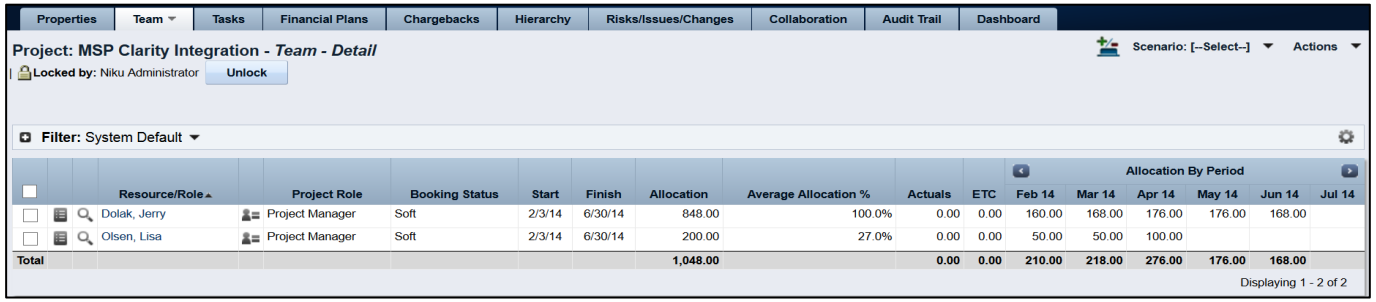
Allocation (CA PPM) – the expected amount of time that a resource is expected to work on the project

Max Units (MSP) – the maximum percentage of working time that a resource is available to work on project tasks

Assignment Units (MSP) – the percentage of working time that a resource is assigned to work on that one task

Max Units

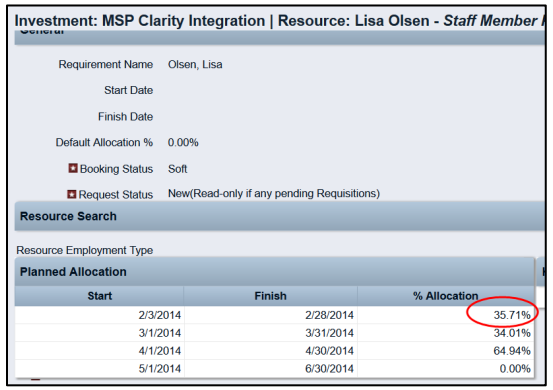
- Average Allocation % and Allocation Hours from CA PPM Team Page:



- MSP Resource Sheet – Max Units:

Resource Name	Type	Initials	Max. Units	Base Calendar
Dolak Jerry	Work	jdolak	100%	Standard
Olsen Lisa	Work	lolsen	36%	7 Hour Availability

- The 36% comes from the Allocation % Segment that matches the current date
- In CA PPM, it's displayed to the hundredths, but is rounded to a whole number in MSP

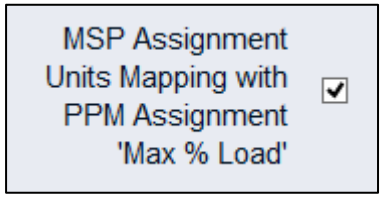


Assignment Units

In previous CA PPM versions, the Task Assignment Unit % would get over-written with the Allocation %

To prevent this from happening, your CA PPM Administrator can check the following option from:

Administration > Project Management > Settings:



Assignment Units

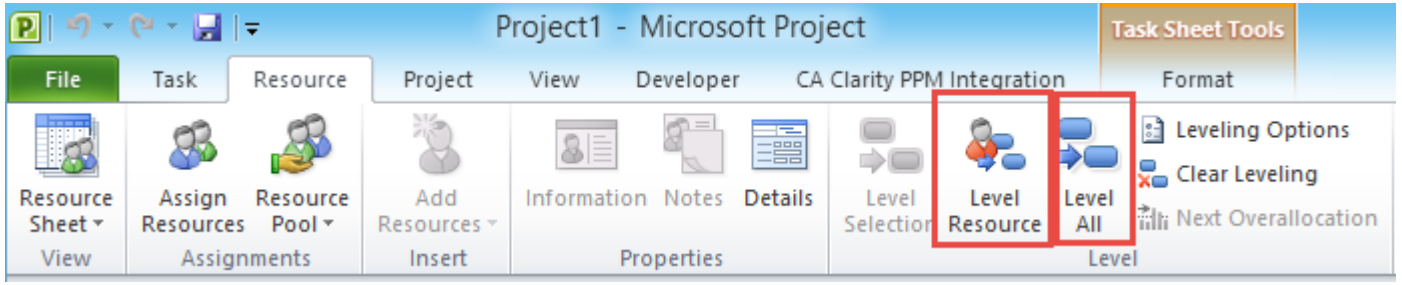
- When Tasks are created and resources are assigned, the Assignment Units for each resource is defaulted from their Max Units
- The two tasks below were entered with 40 hours of work and then assigned to each resource
- Since Jerry's Assignment Units is 100% on a 40 Work Hour task, the Task Duration was calculated to be 5 days
- Since Lisa's Assignment Units is 36% on a 40 Work Hour task, the Task Duration was calculated to be 14 days

Task Mode	Task Name	Start	Finish	Duration	Work	Resource Names	Type
	Task Test A	Mon 2/3/14	Fri 2/7/14	5d?	40h	Dolak Jerry	Fixed Units
	Task Test B	Mon 2/3/14	Mon 2/24/14	14d?	40h	Olsen Lisa[36%]	Fixed Units

Note: The Assignment Units for a resource on a task can be changed when assigning the resource to the task. This will not change the Max Units

Resource Leveling

- Resource Leveling in MSP is the process of delaying or splitting a resource's work on a task to resolve over-allocation



- Level Resource – resolves conflicts for the selected Resources only
- Level All – resolves conflicts for the entire project

Note: The results of Resource Leveling may be significant on a project schedule, but resource leveling does not change who is assigned to tasks, the total work or Assignment Unit values

Tasks

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CA PPM vs. MSP Terminology

CA PPM	MSP
Total Usage	Work
ETC	Remaining Work
Actuals	Actual Work
Project Team Allocation %	Max Units
Max % Load	Assignment Units

MSP Task “Don’ts”

- **Do Not** Assign Resources to a Summary Task – This is allowed in MSP, but not in CA PPM. You will get the “Summary Task Assignments are not Supported” error

- **Do Not** put ETC/Remaining Work on a Milestone – The milestone will turn into a task the next time the schedule is opened from CA PPM to MSP

- **Do Not** put Actual Hours on a Milestone – If hours are added to a Milestone without a Resource Assignment, the Actual Hours will stay on the Milestone in MSP. If hours are added to a Milestone with a Resource Assignment, the Hours won’t stay in MSP after a save to CA PPM

Task Types

- MSP uses the following scheduling formula when calculating tasks:
  - Work = Duration x Assignment Units
- Each value of the formula corresponds to a Task Type:
  - Fixed Work
  - Fixed Duration
  - Fixed Units
- Which task type should be used?
  - It depends on the processes in the organization

Fixed Work

- If work hours are used to estimate how long deliverables will take on a project based on resource assignment
- All Fixed Work tasks are Effort Driven

Example:

- Team Leads will look at project requirements and provide an estimate in hours for each project deliverable
- Project Managers will estimate how many hours each deliverable will take based on experience or a project sizing tool

Fixed Duration

- If Duration (number of days) is used to estimate how many hours deliverables will take to complete based on resource assignment

Example:

- Team Leads will provide the estimated number of days or weeks that deliverables will take to complete
- Project Managers will estimate how many days each deliverable will take based on experience or a project sizing tool

Fixed Unit

- If resources are managed and allocated to projects based on a percentage of their time or if projects are estimated based on the number of resources needed in each role, then “Fixed Units” would work

Example:

- “Resource A” is assigned to a project for 100% of their time to work on tasks. It’s the Resource Manager’s responsibility to make sure they are adequately utilized
- Projects are estimated and staffed with one Project Manager, two Business Analysts, four Software Engineers, etc.

Loading Pattern / Work Contour

CA PPM calls it a “Loading Pattern”…

MSP calls it “Work Contour”…

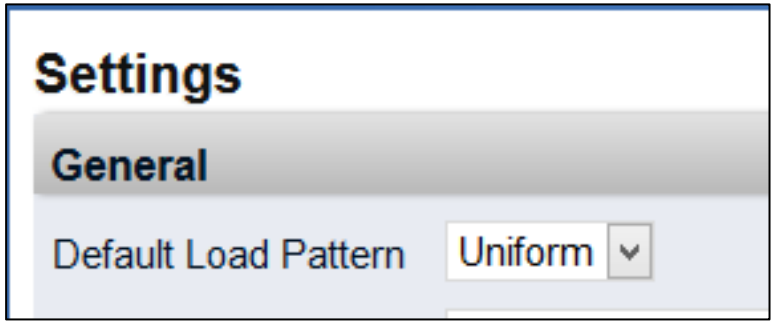
Whatever terminology is used, they both mean the same thing...

It dictates how resource work hours are scheduled over time

CA PPM’s “Loading Pattern” field maps to MSP’s “Work Contour” field

Loading Pattern / Work Contour

- Recommended Default Load Pattern is “Uniform”
- CA PPM Administrator can set the default from: Administration > Project Management > Settings:



- The reasons for this recommendation:
- Due to the way Microsoft Project distributes estimate to complete (ETC) when using both front and back contour patterns, and
- Performance when opening from and saving to CA PPM SaaS – when using the Legacy Driver

Loading Pattern / Work Contour

If you first create the task assignment in CA Clarity PPM:		
Loading Pattern in CA Clarity PPM		**Work Contour in Microsoft Project**
Fixed	becomes	Contoured
Uniform	becomes	Flat
Front	becomes	Front
Back	becomes	Back
Contour	becomes	The msp specific work contour designated on the task when it was first created in MSP. (Turtle, Bell, etc…)

If you first create the task assignment in Microsoft Project:		
Work Contour in Microsoft Project		**Loading Pattern in CA Clarity PPM**
Flat	becomes	Uniform
Front	becomes	Front
Back	becomes	Back
The msp specific work contour designated on the task when it was first created in MSP. (Turtle, Bell, etc…)	becomes	Contour

Loading Pattern / Work Contour

- Fixed Loading Pattern – remaining ETC gets dropped if someone charges less hours than what was planned. It will affect the forecast

- Project Templates will use the Loading Pattern from when the Template was created. The default Loading Pattern needs to be set before creating the template….

Effort Driven Scheduling

Effort Driven scheduling ONLY applies AFTER the initial resource assignment is made, even if you initially add more than one resource

Task Name	Start	Finish	Duration	Work	Resource Names	Type	Effort Driven
Design Brochure	Mon 1/20/14	Fri 1/24/14	5 days	40 hrs	Lisa Olsen	Fixed Units	Yes
Design Brochure	Mon 1/20/14	Fri 1/24/14	5 days	40 hrs	Lisa Olsen	Fixed Work	Yes
Design Brochure	Mon 1/20/14	Fri 1/24/14	5 days	40 hrs	Lisa Olsen	Fixed Duration	Yes

Assign an additional resource at 100% to the tasks

Task Name	Start	Finish	Duration	Work	Resource Names	Type	Effort Driven
Design Brochure	Mon 1/20/14	Wed 1/22/14	2.5 days	40 hrs	Lisa Olsen,Ron White	Fixed Units	Yes
Design Brochure	Mon 1/20/14	Wed 1/22/14	2.5 days	40 hrs	Lisa Olsen,Ron White	Fixed Work	Yes
Design Brochure	Mon 1/20/14	Fri 1/24/14	5 days	40 hrs	Lisa Olsen,Ron White	Fixed Duration	Yes

Note: "Fixed Work" will force the task to be "Effort Driven", so if "Fixed Work" is chosen as the default, all tasks will automatically be "Effort Driven"

Task Constraints

- All “automatically” scheduled tasks will have an “As soon as possible” constraint
- If tasks are created in CA PPM or copied from a template and the Task Start Date is not the same as the Project Start Date, MSP will place a “Start No Earlier” constraint on the Task when the Project Schedule is first opened from CA PPM to MSP
- This applies to the Legacy Driver ONLY; no constraints will be applied using the new XML driver

Constraint Types	
As Late As Possible	Forces a task to start on a date in order for it to finish before the end of the project
Finish No Earlier Than/Finish No Later Than	Sets the completion of the task to fall no sooner or no later than the specified date
Must Finish On/Must Start On	Forces a task to Finish or Start on the specified date
Start No Earlier Than/Start No Later Than	Sets the start of the task to fall no sooner or later than the specified date

Milestones

- Milestones are a point in time and do not have a duration or work assigned to them

- In MSP, you can identify a Task as a Milestone from Task Information > Advanced or by adding the Milestone field column in one of the MSP task views

- Milestones can be linked to other tasks/milestones
- Resource(s) can be assigned to a Milestone
- DO NOT enter a Duration or Work on a Milestone

Elapsed Duration

- Duration can be entered in MSP as Working Days or Elapsed (Calendar) Days, which is the amount of time that a task should take to finish based on a 7 day / 24 hour schedule, including holidays and non-working time
- In MSP, the Duration can be entered as “3ed” to reflect Elapsed Duration instead of “3d”
- The NEW XML driver with MSP 2010 or later will retain the Elapsed Duration
- The Legacy COM driver DOES NOT retain the values from MSP to CA PPM and will be converted to Working Days in CA PPM

How do Actuals Affect Project Schedules?

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How do Actuals Affect Project Schedules?

Three (3) Ways:

1. Resources assigned to tasks will submit their hours through CA PPM Timesheets
2. Timesheets will get Approved and then Posted
3. When a timesheet is Posted, the ETC field is modified on any task assignment that has Actuals

Note: If the task assignment has Loading Pattern/Work Contour of Fixed in CA PPM or Contoured in MSP, planned ETC that WAS NOT submitted as Actuals by that Resource will be removed, which may decrease the Total Work (Effort) on that task

How do Actuals Affect Project Schedules?

- Loading Patterns/Work Contours are set to “Contoured” in MSP if Assignment Hours are modified through the Resource Usage View
- If a Resource submits a timesheet without any hours charged to a particular task that was assigned to them with ETC for that week, those hours will get pushed out and redistributed throughout the remaining duration on that task or dropped depending on the Loading Pattern/Work Contour
- Actuals posted to one task may affect the dates of another task if they are dependent on one another

Actuals: Same Number of Hours as Planned

- Resource submitted their timesheet with the same number of hours assigned:

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type
	Actuals - Fixed Units	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Units
	Actuals - Fixed Work	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Work
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Duration

- Assigned Hours vs. Actual Hours:

	Thu 1/23	Fri 1/24	Mon 1/27	Tue 1/28	Wed 1/29	Thu 1/30
Assigned Hours	8	8	8	8	8	
Hours Entered on Timesheet	8	8				

- Results:

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type
	Actuals - Fixed Units	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	16 hrs	24 hrs	Alex Williams	Fixed Units
	Actuals - Fixed Work	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	16 hrs	24 hrs	Alex Williams	Fixed Work
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	16 hrs	24 hrs	Alex Williams	Fixed Duration

Actuals: Fewer Hours than Planned

- Resource submitted their timesheet with FEWER hours than assigned

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type
	Actuals - Fixed Units	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Units
	Actuals - Fixed Work	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Work
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Duration

- Assigned Hours vs. Actual Hours:

	Thu 1/23	Fri 1/24	Mon 1/27	Tue 1/28	Wed 1/29	Thu 1/30
Assigned Hours	8	8	8	8	8	
Hours Entered on Timesheet	8	8	4			

- **Results:** Since only 4 of the 8 hours that were assigned were recorded, the duration increased by .5 days for both the Fixed Units and Fixed Work Task Types

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type
	Actuals - Fixed Units	Thu 1/23/14	Thu 1/30/14	5.5 days	40 hrs	20 hrs	20 hrs	Alex Williams	Fixed Units
	Actuals - Fixed Work	Thu 1/23/14	Thu 1/30/14	5.5 days	40 hrs	20 hrs	20 hrs	Alex Williams	Fixed Work
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	20 hrs	20 hrs	Alex Williams	Fixed Duration

Actuals: Fewer Hours than Planned (cont'd)

- The Fixed Duration task didn't change the duration, but distributed the additional 4 hours over the last two days so Work is now 10 hours for Tuesday and Wednesday

Task Name	Type	Duration	Work	Assignment Units	Peak	Work Contour	Details	Jan 26, '14							
								T	F	S	S	M	T	W	T
Actuals - Fixed Units	Fixed Units	5.5 days	40 hrs				Work	8h	8h			4h	8h	8h	4h
							Act. Work	8h	8h			4h			
Alex Williams			*40 hrs*	*100%*	*100%*	*Contour*	Work	8h	8h			4h	8h	8h	4h
							Act. Work	8h	8h			4h			
Actuals - Fixed Work	Fixed Work	5.5 days	40 hrs				Work	8h	8h			4h	8h	8h	4h
							Act. Work	8h	8h			4h			
Alex Williams			*40 hrs*	*100%*	*100%*	*Contour*	Work	8h	8h			4h	8h	8h	4h
							Act. Work	8h	8h			4h			
Actuals - Fixed Duration	Fixed Duration	5 days	40 hrs				Work	8h	8h			4h	10h	10h	
							Act. Work	8h	8h			4h			
Alex Williams			*40 hrs*	*100%*	*125%*	*Contour*	Work	8h	8h			4h	10h	10h	
							Act. Work	8h	8h			4h			
							Work								

Actuals: More Hours than Planned

- Resource submitted their timesheet with MORE hours than assigned

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type	Pr
	Actuals - Fixed Units	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Units	
	Actuals - Fixed Work	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Work	
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Duration	

- Assigned Hours vs. Actual Hours:

	Thu 1/23	Fri 1/24	Mon 1/27	Tue 1/28	Wed 1/29	Thu 1/30
Assigned Hours	8	8	8	8	8	
Hours Entered on Timesheet	8	8	4	12		

- **Results:** The Fixed Units and Fixed Work task Durations went back down to 5 days since the resource “caught” up

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type	Pr
	Actuals - Fixed Units	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	32 hrs	8 hrs	Alex Williams	Fixed Units	
	Actuals - Fixed Work	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	32 hrs	8 hrs	Alex Williams	Fixed Work	
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	32 hrs	8 hrs	Alex Williams	Fixed Duration	

Actuals: More Hours than Planned (cont'd)

- The Fixed Duration assigned hours for Wednesday went back down to 8 hours since the resource submitted additional hours the day before

Task Name	Type	Duration	Work	Assignment Units	Peak	Work Contour	Details	Jan 26, '14 T	F	S	S	M	T	W	T
Actuals - Fixed Units	Fixed Units	5 days	40 hrs				Work	8h	8h			4h	12h	8h	
							Act. Work	8h	8h			4h	12h		
Alex Williams			*40 hrs*	*100%*	*150%*	*Contour*	Work	8h	8h			4h	12h	8h	
							Act. Work	8h	8h			4h	12h		
Actuals - Fixed Work	Fixed Work	5 days	40 hrs				Work	8h	8h			4h	12h	8h	
							Act. Work	8h	8h			4h	12h		
Alex Williams			*40 hrs*	*100%*	*150%*	*Contour*	Work	8h	8h			4h	12h	8h	
							Act. Work	8h	8h			4h	12h		
Actuals - Fixed Duration	Fixed Duration	5 days	40 hrs				Work	8h	8h			4h	12h	8h	
							Act. Work	8h	8h			4h	12h		
Alex Williams			*40 hrs*	*100%*	*150%*	*Contour*	Work	8h	8h			4h	12h	8h	
							Act. Work	8h	8h			4h	12h		
							Work								

Actuals: Skipped a Planned Day

- Resource skipped the last day of assigned work and then entered fewer hours on the day after the task was supposed to finish

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type
	Actuals - Fixed Units	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Units
	Actuals - Fixed Work	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Work
	Actuals - Fixed Duration	Thu 1/23/14	Wed 1/29/14	5 days	40 hrs	0 hrs	40 hrs	Alex Williams	Fixed Duration

- Assigned Hours vs. Actual Hours:

	Thu 1/23	Fri 1/24	Mon 1/27	Tue 1/28	Wed 1/29	Thu 1/30	Fri 1/31
Assigned Hours	8	8	8	8	8		
Hours Entered on Timesheet	8	8	4	12	0	4	

- **Results:** Since zero hours were recorded on Wednesday, the task gets split
  - Fixed Units and Fixed Work task types will calculate Duration without counting the days in between the split
  - Fixed Duration tasks WILL count the days in the middle of the split

Task Mode	Task Name	Start	Finish	Duration	Work	Actual Work	Remaining Work	Resource Names	Type
	Actuals - Fixed Units	Thu 1/23/14	Fri 1/31/14	5.5 days	40 hrs	36 hrs	4 hrs	Alex Williams	Fixed Units
	Actuals - Fixed Work	Thu 1/23/14	Fri 1/31/14	5.5 days	40 hrs	36 hrs	4 hrs	Alex Williams	Fixed Work
	Actuals - Fixed Duration	Thu 1/23/14	Fri 1/31/14	6.5 days	40 hrs	36 hrs	4 hrs	Alex Williams	Fixed Duration

Actuals: Skipped a Planned Day (cont'd)

- The Task Finish Dates all changed to Friday, 1/31, to accommodate the extra 4 hours needed to complete the task

Task Name	Type	Duration	Work	Assignment Units	Peak	Work Contour	Details	Jan 26, '14								
								T	F	S	S	M	T	W	T	F
Actuals - Fixed Units	Fixed Units	5.5 days	40 hrs				Work	8h	8h			4h	12h	0h	4h	4h
							Act. Work	8h	8h			4h	12h	0h	4h	
Alex Williams			*40 hrs*	*100%*	*150%*	*Contoure*	Work	8h	8h			4h	12h	0h	4h	4h
							Act. Work	8h	8h			4h	12h	0h	4h	
Actuals - Fixed Work	Fixed Work	5.5 days	40 hrs				Work	8h	8h			4h	12h	0h	4h	4h
							Act. Work	8h	8h			4h	12h	0h	4h	
Alex Williams			*40 hrs*	*100%*	*150%*	*Contoure*	Work	8h	8h			4h	12h	0h	4h	4h
							Act. Work	8h	8h			4h	12h	0h	4h	
Actuals - Fixed Duration	Fixed Duration	6.5 days	40 hrs				Work	8h	8h			4h	12h	0h	4h	4h
							Act. Work	8h	8h			4h	12h	0h	4h	
Alex Williams			*40 hrs*	*100%*	*150%*	*Contoure*	Work	8h	8h			4h	12h	0h	4h	4h
							Act. Work	8h	8h			4h	12h	0h	4h	
							Work									

Prior Start And Prior Finish Fields

One of the biggest complaints from Project Managers is that CA PPM changed their MSP task dates in their project schedule

- When many task dates change, it's difficult for the PM to find the root cause
- By default, Task Start and Finish Dates are already mapped between CA PPM and MSP
  - Those dates may change as Actuals are applied to the project schedule
- You can extend the mapping table with the following MSP fields to make it easier:

Start10	prStart
Finish10	prFinish

Prior Start and Prior Finish Fields

- The extended mapping should NOT be bi-directional; it should be on “Export from CA PPM” only
- When a project schedule is exported from CA PPM to MSP, the Task Start and Finish Dates will be copied to both the MSP Start and Finish fields as well as the new Start10 and Finish10 fields
- The Actuals are then applied to the schedule which may cause the original Task Start and Finish Dates to change, but not the new Start10 and Finish10 fields

Prior Start And Prior Finish Fields

- The Project Manager is now able to compare the following fields to find the first task with a difference

  Start >> Prior Start

  Finish >> Prior Finish

- You can then look at that task and any predecessors to see what could have caused the dates to change

Open For Time Entry Field

- You can extend the mapping table by adding the “Open for Time Entry” (Flag11) field so Project Managers can better control what tasks are open for time entry from MSP
- This should be a bidirectional mapping so the data flows from CA PPM to MSP and from MSP to CA PPM
- In CA PPM, the Open for Time Entry field defaults to “Yes” for new tasks and in MSP it defaults to “No” for new tasks

Maintaining the Project Schedule

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Maintaining the Project Schedule

Once a resource charges time to a project and those hours are posted as Actuals, the Project Manager needs to frequently maintain the project schedule:

- Step 1: Open the Project Schedule from CA PPM to MSP
- Step 2: Review new Actual Work Hours to ensure they look accurate
- Step 3: For Tasks that are Complete:
  Verify that the Remaining Work field is zero (0)
  - If there are hours, enter zero (0), which will reduce the Work field so it matches the Actual Work field
    1. Enter “100%” in the “% Complete” field
    2. Mark the task as “Not Open for Time Entry”

Maintaining The Project Schedule

Step 3 – For Tasks that are Complete, cont.

- To “Close” this Task:

	Task Mode	Task Name	Start	Finish	Duration	Work	Remaining Work	Actual Work	% Complete	OTE	Resource Names	Type
1		Close a Task	Tue 2/18/14	Mon 2/24/14	5 days	40 hrs	24 hrs	16 hrs	0%	No	Mark Smith	Fixed Work

- Work was planned to take 40 hours, but the task was completed with 16 hours:

	Task Mode	Task Name	Start	Finish	Duration	Work	Remaining Work	Actual Work	% Complete	OTE	Resource Names	Type
1	✓	Close a Task - Right Way	Tue 2/18/14	Wed 2/19/14	2 days	16 hrs	0 hrs (1)	16 hrs	100% (2)	No	Mark Smith	Fixed Work
2	✓	Close a Task - Wrong Way	Tue 2/18/14	Mon 2/24/14	5 days	40 hrs	0 hrs	40 hrs	100% (1)	No	Mark Smith	Fixed Work

- Right Way
  - (1) Enter “0” for Remaining Work
  - (2) Enter “100” for % Complete
- Wrong Way
  - (1) Enter “100” for % Complete

Maintaining the Project Schedule

Step 4: For Tasks that are still in progress:

- Adjust any Work hours that need to be increased
- Verify that all tasks have values in the Remaining Work field
- Reschedule any task with a “Finish Date” in the past
- Reschedule any task with a “Start Date” in the past that hasn’t started yet

Copy Or Move A Task

Copy a Task:

You **CAN** use copy/paste to create a NEW Task

- New IDs will be given to the copied task

Move a Task:

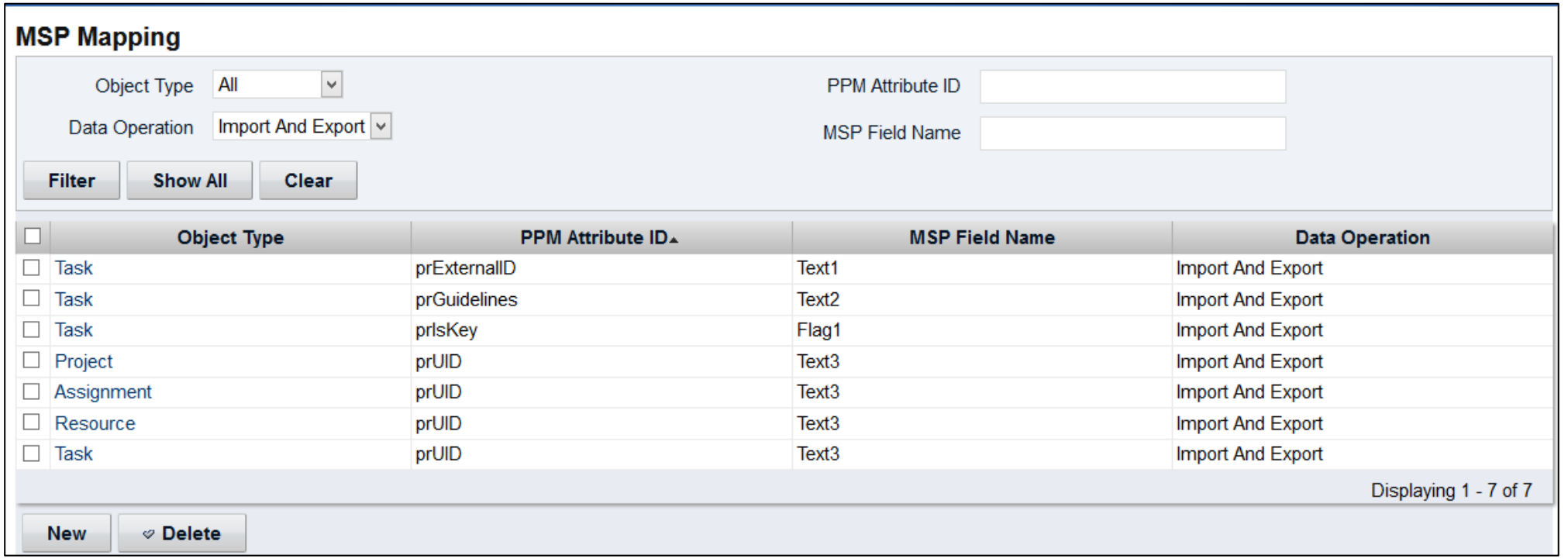
Use the Drag and Drop functionality to move a task

DO NOT use cut/paste to move a task in the project schedule

- This will change the unique Task ID that is used by the CA PPM – MSP Integration

Custom Field Mapping

Custom Fields can be easily mapped between CA PPM and MSP from CA PPM – Administration > Project Management > MSP Field Mappings*:



MSP Mapping

Object Type: All
Data Operation: Import And Export
PPM Attribute ID:
MSP Field Name:

Filter | Show All | Clear

Object Type	PPM Attribute ID	MSP Field Name	Data Operation
Task	prExternalID	Text1	Import And Export
Task	prGuidelines	Text2	Import And Export
Task	prIsKey	Flag1	Import And Export
Project	prUID	Text3	Import And Export
Assignment	prUID	Text3	Import And Export
Resource	prUID	Text3	Import And Export
Task	prUID	Text3	Import And Export

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New | Delete

Questions?

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Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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