CA GREEN PAPERS

CA Clarity TM PPM Project Scheduling with Microsoft Office Project



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■ Microsoft® Office Project, releases 2000 - 2007

FEEDBACK

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Chapter 1: Introduction

Objective

The purpose of this document is to describe the integration between CA ClarityTM PPM and Microsoft[®] Office Project (Microsoft Project) in regard to project scheduling. The goal is to provide information on the scheduling behaviors in both applications so that one can anticipate and understand scheduling changes when exporting a CA Clarity PPM project plan into Microsoft Project.

The configuration outlined below has exhibited the most consistent scheduling behavior when integrating with CA Clarity PPM and is recommended as a best practice implementation configuration:

- Task Type = Fixed Units
- Effort Driven = unchecked
- Update task status updates resource status = unchecked
- Calculation mode = Automatic
- Loading Pattern = Uniform

CA acknowledges that other Microsoft Project settings may provide some of the services described in this document.

The following fields may be used interchangeably throughout this paper:

CA Clarity PPM Field Name	Microsoft Project Field Name
Total Effort	Work
ETC (Estimated Time to Complete)	Remaining Work
Team Members	Resources
Max Load %	Assignment Units



Chapter 2: Project Posting

Microsoft Project Scheduling

CA Clarity PPM provides an interface where users can see aspects of the project within a browser in a myriad of different combinations. CA Clarity PPM is not a dedicated CPM scheduling tool; therefore changes made through CA Clarity PPM to project tasks or assignments may not affect the remainder of the project schedule unless the autoschedule feature in CA Clarity PPM is also used.

Unlike CA Clarity PPM and Open Workbench (OWB), Microsoft Project does not have a feature where you can truly autoschedule the project on demand. As long as you have the calculation mode set to "Automatic", the project will be recalculated as you change the project plan. When integrating with CA Clarity PPM, the project plan is always calculated every time the project plan is exported to Microsoft Project from CA Clarity PPM.

IMPORTANT: CA does not recommend the use of the autoschedule tool in CA Clarity PPM and the use of a scheduler (either Microsoft Project or OWB) on the same project plan, because the business rules within CA Clarity PPM and Microsoft Project may be different.

An important Microsoft Project automatic calculation to keep in mind is **Work = Units X Duration**. The following table details what happens if one of the fields is changed in Microsoft Project, or what happens if you change the value in CA Clarity PPM and then download the project to Microsoft Project.

If the Task type is	Fixed Units	Fixed Duration	Fixed Work
And you change the value of the following fields:			
Fixed Units	Microsoft Project calculates: Duration	Microsoft Project calculates: Work	Microsoft Project calculates: Duration
Fixed Duration	Microsoft Project calculates: Work	Microsoft Project calculates: Work	Microsoft Project calculates: Units
Fixed Work	Microsoft Project calculates: Duration	Microsoft Project calculates: Units	Microsoft Project calculates: Duration

To summarize:

- For a Fixed Units task, Microsoft Project recalculates Duration when you overwrite the Fixed Units value.
- For a Fixed Duration task, Microsoft Project recalculates Work when you overwrite the Fixed Duration value.
- For a Fixed Work task, Microsoft Project recalculates Duration when you overwrite the Fixed Work value.



For the purposes of this Green Paper, all scheduling scenarios will be conducted using Microsoft Project standalone. After each scenario, instructions will be provided on how to replicate the scenario using CA Clarity PPM integrated with Microsoft Project.

Project Posting with Less Hours Scheduled

Posting actual hours to assignments is the surest way to see a scheduling shift in Microsoft Project. In a perfect world, your schedule will not change if your team members work as scheduled for each one of their assignments. However, in the real world this rarely happens.

When you place actuals hours on an assignment, the remaining work will be shifted to the future. If you work fewer hours than planned, the task finish date will have to move out to achieve the hours you failed to do this period. Conversely, if you post more actual hours than scheduled, the task finish date will be brought in.

Let's first go over a scenario where you post actual hours that are less than the hours scheduled for a given time period.

- 1. Open Microsoft Project and create a new project.
- 2. Create a 1-day task.
- 3. Increase the duration of this task to 5 days.
- 4. Assign one resource to the project by typing, or selecting, a name in the "Resource Names" column.

é	2 M	icros	oft Pro	oject - P	roject1														
1	2	<u>F</u> ile	<u>E</u> dit	View	Insert	F <u>o</u> rmat	Tools	Project	<u>C</u> ollabor	ate <u>W</u> indo	v <u>H</u> elp								
		2		3 🛕	🌱 🖻	🔁 🔊	2	લ્ફ કેટ્ર	🗯 🖹	🕵 No Gr	oup	- 🔍) 🏹 🖉	₽	4	+ +	- 1	ls <u>S</u> how ▼	All
		Tas	sks 🔻	Resour	ces 🔹	Track 🔹	Report	t 🔹 📮											
	CA	Clarity	y PPM I	ntegratio	n • 💂														
I					Team	Member													
Ī			0	Task Na	me		Wo	ork	Duration	Star	t		Finish	Pro	edece	ssors	Reso	urce Names	s
		1		task1				40 h	5 d	Thu 7/31/	08 8:00 AN	I	Wed 8/6/08 5:0	0 PM			Team	Member	-

5. Switch to the Task Usage view by going to the Microsoft Project Menu>View and selecting "Task Usage", and add the Actual Work field to the time scale section.

Note the finish date and the Remaining Work distribution.

Now place 4 hours of actual hours on the task start date in the time scale section by right-clicking the time scale section, and selecting "Actual Work" as shown below.

Task Name	Work	Duration	Start	Finish	Detaile					
					Details	M	Т	W	Т	F
⊡ task1	40 h	5.5 d 🔺	Thu 7/31/08 8:00 AM	Thu 8/7/08 12:00 PM	Work				4h	8h
		-			Act. W				4h	
Team Member	40 h		Thu 7/31/08 8:00 AM	Thu 8/7/08 12:00 PM	Work				4h	8h
					Act. W				4h	

As you can see, the finish date on this task has now been shifted one day later and the duration of the task has increased to 5.5 days. The resource did not do all of the remaining work on the first day of this task, so the remaining work was shifted to the future. In this scenario, both the task and the project finish date changed as a result of entering less time than scheduled.

The same result can happen when integrating with CA Clarity PPM using these steps:

- 1. Create a project in CA Clarity PPM.
- 2. Create a 5-day task.
- 3. Add a team member; assign this team member to the task.

You should see 40 hours of Estimated Time to Complete (ETC) on the new assignment.

- 4. Have the team member record 4 hours of actual work on the first day of the task, using CA Clarity PPM Timesheets.
- 5. Submit and approve the timesheet.
- 6. Run the CA Clarity PPM Time Posting job.
- 7. Verify that the timesheet is in "Posted" status.
- 8. Export the project to Microsoft Project.

Project Posting with More Hours Scheduled

The following is an illustration of what will happen on a project plan if more hours are posted on an assignment than are scheduled for a given time period.

- 1. Launch Microsoft Project and create a project.
- 2. Create a 1-day task.
- 3. Increase the duration of this task to 5 days.
- 4. Assign one resource to the project by typing, or selecting, a name in the "Resource Names" column.
- $5. \ \ \, Switch to the Task Usage view and add the Actual Work field to the Time Scale section.$

Note the task finish date and the remaining work distribution.

6. Place 16 hours of Actual hours on the start date as shown below.

As you can see, the finish date moved one day earlier and the duration decreased from 5 days to 4.

6	Task Name	Work	Duration	Start	Finish	Nataile					
-						Jetaiis	М	Т	W	Т	F
	⊡ task1	40 h	4 d	Thu 7/31/08 8:00 AM	Tue 8/5/08 5:00 PM	Work				16h	8h
						Act. W				16h	
12	Team Member	40 h		Thu 7/31/08 8:00 AM	Tue 8/5/08 5:00 PM	Work				16h	8h
						Act. W				16h	

The same result can happen when integrating with CA Clarity PPM using these steps:

- 1. Create a new project in CA Clarity PPM.
- 2. Create a 5-day task.
- 3. Add a team member; assign this team member to the task.

You should see 40 hours ETC placed automatically on the new assignment.

NOTE: If the resource's calendar is set to an 8 hour work day, a 5 day duration task will equate to 40 hours of ETC.



- 4. Have the team member record 16 hours of work on the first day of the task, using CA Clarity PPM Timesheets.
- 5. Submit and approve the timesheet.
- 6. Run the CA Clarity PPM Time Posting job.
- 7. Confirm that the timesheet has posted.
- 8. Export the project to Microsoft Project.

Starting a Task Early

It is not unusual that a team member begins work early on a task. Of course, this will move the task start date to an earlier day and bring in the finish date. But what will happen if there is more than one assignment on the task, and only one team member begins work early?

- 1. Create a project in Microsoft Project.
- 2. Create a 5-day task.
- 3. Assign two team members by typing two names in the "Resource Names" column separated by a comma.
- 4. Switch to the Task Usage view and add the Actual Work field to the Time Scale section. Note the start and finish date, duration and the remaining work distribution.

	0	Task Name	Work	Duration	Start	Finish	Detaile				
	-						Details	M	T	W	Т
1		⊟ task1	80 h	5 d	Thu 7/31/08 8:00 AM	Wed 8/6/08 5:00 PN	Work				16h
							Act. W				
		Team Member 1	40 h		Thu 7/31/08 8:00 AM	Wed 8/6/08 5:00 PN	Work				8h
							Act. W				
		Team Member 2	40 h		Thu 7/31/08 8:00 AM	Wed 8/6/08 5:00 PN	Work				8h
							Act. W				

5. For the first resource, enter 8 hours of actual work on each of the 3 business days before the task start. For the second resource, beginning on the planned start date for the task, enter 8 hours of actual work on each day of the current week, as shown below.

As you can see, the start date is pulled in 3 days; however, the duration has increased to 8 days.

:) 💕		3 🖪 🖤 🖻 🛍 🔊	😣 တ ફે	ž 🐳 i 🗈	🕵 No Group	• 🍕 🤤 🍞 🐵 📄	. 4	÷ • •	- 🔩 Sh	ow 🕶 All 1	Fasks	• 7=
1	🔲 Та	sks 🔻	Resources 🔹 Track 🔹	Report 🔸	-								
1	CA Clarit	ty PPM I	ntegration 🔹 🖕										
Γ		0	Task Name	Work	Duration	Start	Finish	Details	9	- T	14/	Ŧ	5
	1		E task1	80 h	8 d	Tue 11/17/09 8:00 AM	Thu 11/26/09 5:00 PM	Work		8h	8h	8h	16h
								Act, W		8h	8h	8h	8h
		M	Team Member 1	40 h		Fri 11/20/09 8:00 AM	Thu 11/26/09 5:00 PM	Work		Oh	Oh	Oh	8h
								Act. W		Oh	Oh	Oh	8h
Γ		1 da	Team Member 2	40 h		Tue 11/17/09 8:00 AM	Mon 11/23/09 5:00 PM	Work		8h	8h	8h	8h
Г								Act. W		8h	8h	8h	

HINT: The assignments play a role in the task duration and start and finish dates. Always review the individual task assignments using the Microsoft Project Task Usage view to get a true representation of your project plan.



Here is how you can achieve the same result when integrating with CA Clarity PPM using these steps:

- 1. Create project in CA Clarity PPM.
- 2. Create a 5-day task.
- 3. Add two team members, and assign these team members to the task. You should see 40 hours of ETC.
- 4. Have one team member record 8 hours of work on the three days prior to the task start date for one time period via CA Clarity PPM Timesheets.
- 5. Have the second team member record 8 hours of work on each day beginning on the planned task start date for one time period via CA Clarity PPM Timesheets.
- 6. Submit and approve both timesheets.
- 7. Run the CA Clarity PPM Timesheet Posting job.
- 8. Verify both timesheets have posted.
- 9. Export the project to Microsoft Project.

Chapter 3: Dependencies

Introduction

Adding dependency links to your tasks is another way that you will see a scheduling shift in Microsoft Project. Although this will not affect the work distribution, the duration, or the assignments, it can possibly change the start and finish date on tasks and have a "trickle-down" effect throughout the plan.

Creating Dependencies in Microsoft Project

The following are the steps for creating task dependencies in Microsoft Project.

- 1. Create a project in Microsoft Project.
- 2. Create five 5-day tasks as shown below. Note the start and finish date of the project and each subsequent task:

0	Task Name	Duration	Start	Finish	Predecessors	, '09 T W T F S	Jul 26, '09 S M T W T F	Aug 2, '0 S S M T
	Project2	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM				
	Task1	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM				
	Task2	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM				
	Task3	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM				
	Task4	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM				
	Task5	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM				

NOTE: We have added the Project Summary task to this view by going to Menu>Tools>Options>View and checking the "Show project summary task" checkbox.

L							
ĺ		0	Task Name	Duration	Start	Finish	Predecessors
ĺ	0		Project2	25 d	Fri 7/24/09 8:00 AM	Thu 8/27/09 5:00 PM 📃	
ĺ	1		Task1	5 d	Fri 7/24/09 8:00 AM	Thu 7/30/09 5:00 PM	
ĺ	2		Task2	5 d	Fri 7/31/09 8:00 AM	Thu 8/6/09 5:00 PM	1
I	3		Task3	5 d	Fri 8/7/09 8:00 AM	Thu 8/13/09 5:00 PM	2
	4		Task4	5 d	Fri 8/14/09 8:00 AM	Thu 8/20/09 5:00 PM	3
ĺ	5		Task5	5 d	Fri 8/21/09 8:00 AM	Thu 8/27/09 5:00 PM	4
ĺ							

3. Create dependencies. Make the next task the successor as shown below:

The duration of the tasks remain at 5 days. However, the duration of the project and the finish date of each task are pushed out into the future.

The same result can happen when integrating with CA Clarity PPM using the following steps:

- 1. In CA Clarity PPM, create a project.
- 2. Create 5 tasks. Use the default start date, and make the finish date 5 days from the task start.
- 3. In CA Clarity PPM, go to the task properties page for task1 and click on the "Dependencies" link.



You will see the following display:

Task Properties (Project:	testproject Task: task1)	
Properties Estimating Ass	ociated Forms Associat	ed Risks/Issues Processes
Main : Dependencies		
	General	
▶ General	* Name	task1
▶ Admin	🖬 D	task1
	* Start	7/27/2009
	* Finish	7/31/2009
	Milestone	
	Key Task	
	Oracle Project Task (Solution)	Ш М Ш
	Status	Not Started -
	% Complete	0.00%
	Open for Time Entry	
	Save Submit Cancel	

4. Create new finish-start dependencies between the tasks as shown below:

Task Dependency Prope	rties (Project: testproject Task: task1)
Conoral	
General	
Dependent Task	task2
Relationship	Predecessor -
🛚 Туре	Finish-Start 💌
Lag	0.00
👪 Lag Type	Daily
Submit Cancel	
Required	

5. Export the project to Microsoft Project and view how the project schedule has changed, based upon the dependencies you entered.

Chapter 4: Assignments

Adding or removing assignments in either Microsoft Project or CA Clarity PPM should not affect task dates if the following conditions are met:

- Tasks are not effort driven.
- The Resource calendar matches the Microsoft Project project calendar.
- There is no subsequent modification of ETC in either CA Clarity PPM or Microsoft Project.

In both Microsoft Project and CA Clarity PPM, when you assign a team member to a task their assigned ETC will be calculated based upon their project allocation and the task duration.

For example: When you assign a team member in CA Clarity PPM who is allocated at 100% to a 5-day task, they will be assigned at 8 hours per day for a total of 40 hours of ETC (provided that the resource calendar is an 8 hours per day shift). If you then open this project in Microsoft Project, you will see no change in the project schedule. The same behavior is present if you assign the resource in Microsoft Project.

A complication arises when you modify the ETC on an existing assignment.

Modifying ETC on a Task

Follow these steps to modify the ETC on one of your tasks:

- 1. Create a project in Microsoft Project.
- 2. Add a team member.
- 3. Add a 5-day task and add an assignment for the team member.

See that the "Work" field is now 40 hours. Note the duration and the task finish date.

	2	<u>F</u> ile	<u>E</u> dit	<u>V</u> iew	<u>I</u> nsert	F <u>o</u> rmat	<u>T</u> ools	Project	<u>C</u> ollaborat	e <u>W</u> indow	<u>H</u> elp			
		2		3 🛕	ABC 🕒	8		લ્લ હેટ્સ	💥 🖹 🖁	强 No Group		- 🔍 🤜 岁 🄇) 📲 i 🦇 🛛	> 💠 🗕 📩 Shor
	Tasks • Resources • Track • Report •													
	CA Clarity PPM Integration -													
Γ			0	Task Na	ame		Du	ration	Work	Start		Finish	Predecessors	Resource Names
		1		Tas	k1			5 d	40 h	Fri 11/20/09 8	8:00 AM	Thu 11/26/09 5:00 PM		Team Member

4. Change the work to 60 hours.

	CA Clarit	ty PPM I	integration 👻 💂	20						
I										
		0	Task Name	Duration	Work	Start	Finish	Predecessors	Resource Names	
	1	1 Task1		sk1 7.5 d 60 h Fri 11/20		Fri 11/20/09 8:00 AM	11/20/09 8:00 AM Tue 12/1/09 12:00 PM		Team Member	



The duration of the task has now increased to 7.5 days to accommodate the additional ETC. Understanding this concept is important: if you have a Fixed Units task type and change the work, the duration will increase.

You can achieve the same result when integrating Microsoft Project with CA Clarity PPM by doing the following:

- 1. Create a project in CA Clarity PPM.
- 2. Add a team member.
- 3. Create a 5-day task.
- 4. Assign the team member to the task.
- 5. Go to the assignment properties for this new task and change the ETC to 60 hours as shown below.

	Search [Advanced]	
Assignment Properties	(Project: taunyatestx Task: task	1)
General		
Resource	Methodologist	
Role	Methodologist	MI
Loading Pattern	Front 💌	
Actuals	0.00	
Actuals Thru		
Status	Not Started	
Start	7/28/2009	
🏽 Finish	8/3/2009	
Proposed ETC		
ETC	60.00	
Save Submit Cancel		
🙁 = Required		

6. Export this project to Microsoft Project and check the task duration.

Chapter 5: Assignment Units

Assignment units refer to the amount of time a team member is able to work per day on a task. When team members are assigned to a task, they are assigned at 100% of their allocation by default. For example, if a resource has an 8 hour calendar work day and they are allocated at 100%, then they will be scheduled to work 8 hours per day.

In Microsoft Project, you have the ability to change the Assignment Units. As a reminder, if you change the assignment units on a fixed duration task type, the duration of the task will change accordingly.

Changing Assignment Units in Microsoft Project

These steps illustrate changing assignment units in Microsoft Project:

- 1. In Microsoft Project, create a new project.
- 2. Create a 5 day task, and add an assignment.

You will see that the work is now 40 hours.

3. Split the view by clicking Window in the menu tool bar, and then split as shown below.

c	CA Clarity PPM Integration -											
			Task1									
		0	Task Name		Duration	Start	Finish	Predecessors	Resource Names			
	1		Task1		5 d	Fri 11/20/09 8:00 AM	Thu 11/26/09 5:00 PM		Team Member			
Į												
臣												
3												
_	•								<u> </u>			
	Name:	Task:	1		Qur	ation: Sd 🛨 🗖 E	ffort driven Previous	Ne <u>x</u> t				
	Start:	Fri 11	1/20/09 8:00 . 💌	Finish: Th	u 11/26/09	5:00 Task type: Fixed	Units 💌 % Complet	te: 0% 📩				
	ID	Resou	rce Name	Units	Work	ID Predecesso	or Name Type	Lag 🔺				
	1	Team	Member	100%	40h							

- 4. In the Task Form section, change the Units from 100% to 50%.
- 5. Click in the Gantt chart so that the project recalculates.



6. The duration is now doubled to 10 days, because the team member can only work half time.

1					
Task Name	Duration	Start	Finish	Predecessors	Resource Names
Task1	10 d	Fri 11/20/09 8:00 AM	Thu 12/3/09 5:00 PM		Team Member[501
					-
k1	Qurat	ton: 10d 📑 🗆 🗉	fort driven Previous	Next	
	Task1	Task1 10 d	Task1 10 d Fri 11/20/09 8:00 AM k1 Quration: 10 d Fri 11/20/09 8:00 AM	Task1 10 d Fri 11/20/09 8:00 AM Thu 12/3/09 5:00 PM k1 Quration: 10 d 10 d Effort driven Previous	Task1 10 d Fri 11/20/09 8:00 AM Thu 12/3/09 5:00 PM k1 Quration: 10d Image: Effort driven Previous Negt

To achieve the same results when integrating with CA Clarity PPM:

- 1. Create a project in CA Clarity PPM.
- 2. Add a team member.
- 3. Create a 5-day task.
- 4. Assign the team member to the task. You will see that 40 hours of ETC has been added to the assignment.

Са

5. Go to the Task Properties page in CA Clarity PPM.

General								
* Name	Task1		1		1	/ust Start (Dn 🛛	
🖽 D	task1				м	ust Finish (
💌 Start	7/29/2	2009			Start No Earlier Than			
Finish	8/4/20	09			Start No Later Than			
Milestone					Finish No Earlier Than			
Key Task					Finish N	lo Later Th	an	
Oracle Project Task (Solution)	Task (Solution)							
Status	Status Not Started 💌							
% Complete	0.00%)						
Open for Time Entry								
Save Submit Cancel								[Links][Notes]
Assignments								
								[Actions] 🗸
Resource	e≜	Resource ID	Role		Start	Finish	Actuals	F [Actions] Configure
Methodologis	tΩ	Methodologist	Methodolog	ist	7/29/09	8/4/09	0.00	Multisort Export to Excel
Total Results: 1								Edit Mode
Assign 🗸 Replace 🗸	Remove							
 Q = Role Work Effort ■ = Required ■ = Er 	= Hours nter Once	e 🗰 = Unique						

6. In the Assignments section, click on Actions and select Configure.

- 7. From the List Column Layout, add the "Max % Load" field to the Selected Column.
- 8. From the Actions menu, select "Edit Mode" and modify the Max % Load to 50 as shown below, and save.

General								
Name	Task1		Must Start	On 🛛	C			
🖬 ID	task1		Must Finish	On				
Start	7/29/2009		Start No Earlier Th	an	e			
Finish	8/4/2009		Start No Later Th	an	e			
Milestone			Finish No Earlier Th	Finish No Earlier Than				
Key Task			Finish No Later Than					
Status	Not Started -		Exclude from Autoschedul	ng 🗖				
% Complete	0.00%							
Guidelines								
Charge Code		Mi						
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Save Submit Cancel							[Links][Note	
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Resource A	Resource ID	Role	B Start	Finish A	ctuals	ETC	Max % Load	
Methodologist 👔	Methodologist	Methodologist 🕅 🛍	7/29/2009 8/4	1/2009	0.00	40.00	50	
Total Results: 1								

9. Export this project plan to Microsoft Project.



Chapter 6: Constraints

Introduction

The handling of task constraints is one of the most elusive concepts in Microsoft Project. Although you can manually define task constraints in Microsoft Project, they are often added to the task automatically. Generally, any task where the date has changed is subject to having a task constraint added in Microsoft Project. When using Microsoft Project with CA Clarity PPM this unpredictability is compounded.

New Task Constraints

A common concern for CA Clarity PPM users involves exporting a project with new tasks from CA Clarity PPM to Microsoft Project. The new tasks may be assigned a constraint automatically. This can happen if the new task start date is a different date from the project start date.

Consider this scenario:

1. Launch Microsoft Office Project and make sure the setting "New tasks:" under Tools>Options>Schedule is set to "Start On Project Start Date" as shown below.

ptions			2						
View	General	Edit	Calendar						
Save	Interface	Security							
Schedule	Calculation	Spelling	Collaborate						
Schedule options for Microsoft Office Project									
Show scheduling messages									
Show assignment units as a: Percentage									
Scheduling options for 'Project1'									
New tasks: Start On Project Start Date									
Duration is entered in:									
Work is entered in:	Hours	_							
Default task type:	Fixed Units	~							
New tasks are <u>e</u> ffort dri	ven								
Autolink inserted or mov	ed tasks								
🔽 Split in-progress tasks									
Tasks will always honor	their constraint dates								
Show that tasks have e	sti <u>m</u> ated durations								
New tasks have estimat	ed durations		Set as <u>D</u> efault						
Help			K Cancel						



2. Create a new task. By default the task start date is the same as the project start date. Now change this date to a date in the future.

You will see that the task automatically gets a "Start No Earlier Than" constraint because the task start date has been changed from the project start date.

🖗 Microsoft Project - Project1											
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🔲 Tasks 🔹 Resources 🔹 Track 🔹 Report 🔹 🖕											
CA Clarity PPM Integration -											
Task Name	Work Du	luration	Start	Finish	Predecessors	Resource Names					
1 1 task1	ρh	1 d? 🍢 M	on 2/15/10 8:00 AM	Mon 2/15/10 5:00 PM							
This task has a 'Start No Earlie constraint on Mon 2/15/10 8:0	er Than' 00 AM.										

You can accomplish the same result when integrating with CA Clarity PPM using the following steps:

- 1. Create a new project in CA Clarity PPM.
- 2. Allocate one team member.
- 3. Create Task1 with a start date that is equal to the project start date.
- 4. Assign the team member to this task.
- 5. Create Task2 with a start date that is greater than the project start date.
- 6. Assign the team member.
- 7. Export this project to Microsoft Project.
 - Task1 will not have a constraint because it begins on the project start task.
 - Task2 will have a constraint because the task is later than the project start date.

NOTE: Users can add the constraint attributes to the WBS view in CA Clarity PPM. This is helpful in determining if the constraint already existed on the project or if the constraint was introduced when the project was exported to Microsoft Project. Adding constraints to the view layout is illustrated below:

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General	Save Save and Exit Cancel	_				
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	Save Save and Exit Cancel					



Chapter 7: Summary

Integrating CA Clarity PPM and Microsoft Project can be very challenging, especially for project managers new to CA Clarity PPM, Microsoft Project, or both. After you practice and understand the different ways a project can be rescheduled in Microsoft Project, and the ways that CA Clarity PPM influences these behaviors, you will be able to anticipate these changes and avoid confusion.

While this paper reviews some of the most common scenarios for project scheduling, it is not an all-inclusive list. If you see a scheduling change in Microsoft Project that you do not expect after exporting a project plan from CA Clarity PPM, we recommend that you do the following:

- 1. STOP! Do NOT save the project plan back to CA Clarity PPM, because this will update the data in CA Clarity PPM with the changes that are displayed in Microsoft Project.
- 2. Review the project plan in CA Clarity PPM to determine what areas of the plan have changed.
- 3. After you identify the discrepancy, look for possible sources of the change (for instance, Timesheet posting, assignment additions, and so forth).
- 4. If you are unable to determine the source of the scheduling change, contact CA Clarity PPM Support for assistance.



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