|  |
| --- |
| Load and Validate CAM Codes |
| **Process Description: CAM Code Assignments are maintained in a separate database and loaded into Cobra with a Transaction file.** |

| **Load and Validate Codes Processing Steps** | | **Comments** |
| --- | --- | --- |
|  | 1. Reconcile Baan to CAM Database file    * Find changes made to Baan throughout month not in to database |  |
|  | 1. Ensure all changes entered in to “CAM Change Form” have been verified and carried through    * Contact CAMs as needed to verify    * CA and CAM Code entered in to Baan under proper hull    * CAM code,/filters in COBRA    * Add CAMs to ‘CAM Role” table as needed |  |
|  | 1. Export current CAM code assignments in a select statement in SQL    * select ca1, ca2, wp, c1, c6 from cawp where program='0465' and BAC>0”    * right click result and “save as” in the “Export from Cobra” file under proper month with hull as name.    * open the .xls file and copy and paste in to the “Worksheet for updating codes”      + click “Refresh All”        - this file has a link to the CAM Change Database.      + The formula, =IF(E2>" ",IF(E2=F2,"yes","no"),IF(D2=F2,"yes","no")) results in “No” if the code doesn’t match and #N/A if the control account is not found      + Set filter on column G, unselect “yes”      + Change codes to match column F        - C1 is the control account        - C6 is the WP        - Filter by “wp” (column C) to do an = formula and drag down      + Look for and correct any #N/A statements        - Add control accounts and CAM Codes to Database    * Now “save as” a .csv file to the “Transaction Files” folder (under proper month) hull name      + Copy paste special, values for column D:E      + Delete column F:G    * Close file and prepare to upload in to Cobra |  |
|  | 1. Load the code assignments from P6  * In Cobra click **<File>, <Integration>, <Integration Wizard>** * Select the radio button for ***Project Data.*** Click **<Next>** * Select the radio button to ***Open an existing configuration*** * Click the ellipsis to navigate and select the correct CAM code assignment configuration file. * The box for **Where are you loading the data from?** Should say **Files.** Click **<Next>** * The connection name should be pre-populated with PMDB82Test. Click **<Next>** * On the ***Action Selection*** screen, in the ***Project Data*** section, select ***Code Assignments.*** Click **<Next>.** * On the ***Project Selection*** screen, click the ellipsis for ***Schedule Project***, navigate to and select the correct IMS file. Click the ellipsis for ***Cobra Project,*** navigate to and select the project you are loading data into. Click **<Next>.** * On the ***Schedule Mapping*** screen, in the ***Project Keys*** section, the ***Schedule Fields:*** should be populated as follows: * ***WBS: TASK.COBRA\_CA*** * ***OBS: TASK.COBRA\_OBS*** * ***WP: TASK.COBRA\_WP*** * ***CAM: MMC CAM*** * On the ***Control Account Codes*** tab, **CA Number** should display **TASK.COBRA\_CA.** * On the ***Work Package Codes*** tab, **CCDR SWBS** should display **TASK.COBRA\_SWBS\_GROUP** AND **Baan Item No.** should display **TASK.COBRA\_ITEM\_NO** Click **<Next>.** * On the ***Filter*** screen in the ***Criteria*** field, click the dropdown and select ***Control Account.*** In the ***Selection*** field, click the ellipsis and select ***<Name>*** to select all Control Accounts***.*** Click **<Next>** * On the ***Save and Load*** screen, check the box to ***Load data now?.*** If you want to save this configuration file, check the box to ***Save your configuration.*** You can either give the configuration a new name or overwrite this one. Click ***<Finish>.*** | Highlighted part needs to be changed |
|  | 1. In the SQL statement tool run:    * + update cawp set manager = c1 where program = '0471'        - This is done due to no other way to update the manager code |  |
|  | 1. Validate all Material work packages have a SWBS code assigned  * In Cobra, select All *Reports* * Double-click the ***01-01-EVM***report * Click the dropdown for Project. Navigate to and select the correct project. Click **<Next>.** * On the *Filter* screen, click the ellipsis for Filter:. Navigate to and select the ***Missing SWBS***filter. Click **<Finish>.** * You should receive a message saying **“No records found to report”** |  |
|  | 1. **Re-Export using the above instructions to double check to make sure that the changes have taken place. Save the file as “hullafterload.csv” in case there is ever question.** |  |
|  | 1. Backup the program naming it **“04xx after CAM codes load”.** |  |