

The slide features a blue header with the IBM logo and the text "IBM Software Group | Rational software". The main content area is white and contains the title "IBM® Rational® ClearQuest®" and the subtitle "Importing records into ClearQuest" in a bold, italicized font. Below the subtitle is the "Rational software" logo. A horizontal bar with various icons is positioned below the logo. The footer is blue and includes the text "@business on demand.", "© 2007 IBM Corporation", and "Updated September 4, 2007".

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IBM® Rational® ClearQuest®

Importing records into ClearQuest

Rational software

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This presentation will cover importing records into IBM Rational ClearQuest.

Module objectives

- These topics are covered in this module:
 - ▶ Order of import
 - ▶ Saving original ID
 - ▶ Importing related records like attachments and history
 - ▶ Import parent-child relationships
 - ▶ Importing defects
 - ▶ Importing duplicates
- Upon completion of this module, you will be able to:
 - ▶ Understand the order in which records should be imported
 - ▶ Understand why you need to save the original record ID
 - ▶ Know how to import primary and related records



IBM ClearQuest offers customers the tools to import data that could come from other ClearQuest databases or from another data source. This module assumes that you are familiar with schema design and you are using ClearQuest 7.0 or greater. You should also have files that were either exported from a ClearQuest database or created in the format described in ClearQuest Help under the topic “Creating a Rational ClearQuest import file.”

If you are importing data from another ClearQuest database, you can choose the ClearQuest import format and correctly formatted files will be created. If you are importing from another data source, you will need to format the files yourself, using the information in online help for ClearQuest.

This introduction to importing records into IBM ClearQuest will cover importing data into a ClearQuest database including the order in which you should import the records, storing the original record ID, and importing related records, such as history, attachments, duplicates, importing records that have a parent-child relationships, importing defects, and importing duplicates.

Order

- Import the lowest-referenced records first
 - ▶ If you have *record1* with a reference to *record2* and *record2* has a reference to *record3*, you would import in this order:
 - record3
 - record2
 - record1
- Import users first if you are importing records into a database that is dependent on another schema repository
 - ▶ Use the export functionality in User Administration to export the users (Utilities > Export) before importing the primary records
 - ▶ Export users using the export record functionality in the ClearQuest client
 - ▶ Note: You can only import users through User Administration import functionality



When importing records into ClearQuest, it is important to be very familiar with the schema. Start with your primary records and make a list of the records that are referenced in either the “reference” or “reference_list” fields. Note: Other state-based record types are being referenced will be covered later in this module.

You also need to check in any choice list hooks to see if the list is being created from another record type and add those record types to your list. You then need to go through that list of referenced record types to determine if they in turn reference any other record types and add those new record types to the list.

In this example, you will need to import according to the list, starting at the bottom. If you have *record1* with a reference to *record2* and *record2* has a reference to *record3*, you would import in this order: first, record3, then, record2, and finally, record1.

You should import users first if you are importing records into a database that is dependent on another schema repository *and* your records contain a reference to users. Make sure you use the export functionality in User Administration to export the users (Utilities > Export) before importing the primary records. You can export users using the export record functionality in the ClearQuest client but note you can only import users through User Administration import functionality.

Store original ID

- Store the original record ID if you are going to import records that relate to the records you are importing
 - ▶ History
 - ▶ Attachments
 - ▶ Duplicates
 - ▶ Updates from the original database



When a state-based record is created in ClearQuest, the ID is composed of the logical database name and a sequential number. The history records and attachments relate to the ID of the record.

When you import state-based records, the record is given a new ID. The logical database name for the new database is different so the new ID will be different. Even if the new logical database were the same, the sequential number would probably be different. If you are importing any of the record types above or plan to import updates from the original database, you will need to store the original ID.

You should store the original record ID if you are going to import records that relate to the records you are importing, History, Attachments, Duplicates, Updates from the original database, or other ID's.

Section

Importing records



The following slides will cover importing with IBM Rational ClearQuest.

EXAMPLE: ClearQuest import

- Importing stateless records
- Importing state-based records
- Importing records related to the state-based records
 - ▶ History
 - ▶ Attachments
- Importing state-based records that are referenced by state-based records you are importing
- Importing duplicates



The examples of import records shown here cover many of the import needs you may have when using ClearQuest 7.0. Earlier versions of ClearQuest did not allow you to import state-based records referenced by other state-based records. This was fixed in ClearQuest 7.0 and later versions. In the ClearQuest import tool, you can specify the field in which you stored the original ID so the records can be matched.

With ClearQuest, you can now import stateless records, state-based records, records related to the state-based records, state-based records referenced by other state-based records, and duplicate records.

EXAMPLE: ClearQuest import (continued)

- Import a ClearQuest sample database based on the DefectTracking schema for the export
- The defect record is a state-based record that references the following stateless records:
 - ▶ Customer
 - ▶ Project
 - ▶ Users
- There is a reference field, `related_records`, that points to other defect records



This example uses data exported from a ClearQuest sample database based on the DefectTracking schema. When importing this type of record, ClearQuest records such as, customer, project, and users should be imported first. You can also see the related records reference field that points to other defect records.

To import users, User Administration should be used instead of the import tool. You would only need to import them if the database you are importing into belongs to another schema repository.

EXAMPLE: ClearQuest import (continued)

- There is a back reference field called Parent_defects in the customer record that points back to the defect record.
- SAMPL00000043 links to SAMPL00000044 through the related_records field. There is a back-reference field in Defect record called parent_records. In the example, SAMPL00000043 is the parent.
- SAMPL00000006 has an attachment.
- SAMPL00000041 is a duplicate of SAMPL00000042.



In this last example, look for the back reference field called Parent_defects in the customer record that points back to the defect record. You will see the many types of relationships here.

Next steps

- In the next set of slides, the records will be imported in this order:
 - ▶ Customer
 - ▶ Project
 - ▶ Defects
- Current defects will be discussed



Now that you have seen some examples of types of records to import, you can see the next steps involved with import. In the next set of slides, the records will be imported in this order: Customer records, Project records, and then Defects records. The order does not matter as much here because none of these reference the others.

Importing stateless records

- Import state-based records
 - ▶ Can not match the incoming ID to the ID in the database you are importing the record into
 - ▶ ID is a system field and cannot be written
- Import stateless records first
 - ▶ You do not need to worry about storing the original ID because IDs are not constructed in the same way for stateless records.



When you import state-based records, you cannot match the incoming ID to the ID in the database you are importing the record into because ID is a system field and cannot be written. When you map an incoming source field label on the right to a destination field label on the left of the mapping form, you are saying that you could write that source field value on the right into the destination field on the left. You cannot write to the ID field – that is why you have to save the original ID in a field that can be written.

For stateless records, ClearQuest does not have a system field for an identifier. You choose the unique key and you can write to it. You do not need to store the original ID because IDs are not constructed in the same way for stateless records as they are for state-based records.

Importing customers (continued)

Enter the record type

Importing record data

ClearQuest Import Tool - Step 1 of 5

Please provide information regarding the data you will be importing.

Step 1
Please select the Record Type to which you will be importing.

Record Type: Customer

Step 2
Please specify the type of data you will be importing. Select all that apply.

Record Data
 History
 Attachments

Step 3
Are you importing updates to existing data records in your ClearQuest user database?

Yes
 No

< Back Next > Cancel Help

11
Importing records into ClearQuest
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On this first step of the import tool, provide the information regarding the data you will be importing.

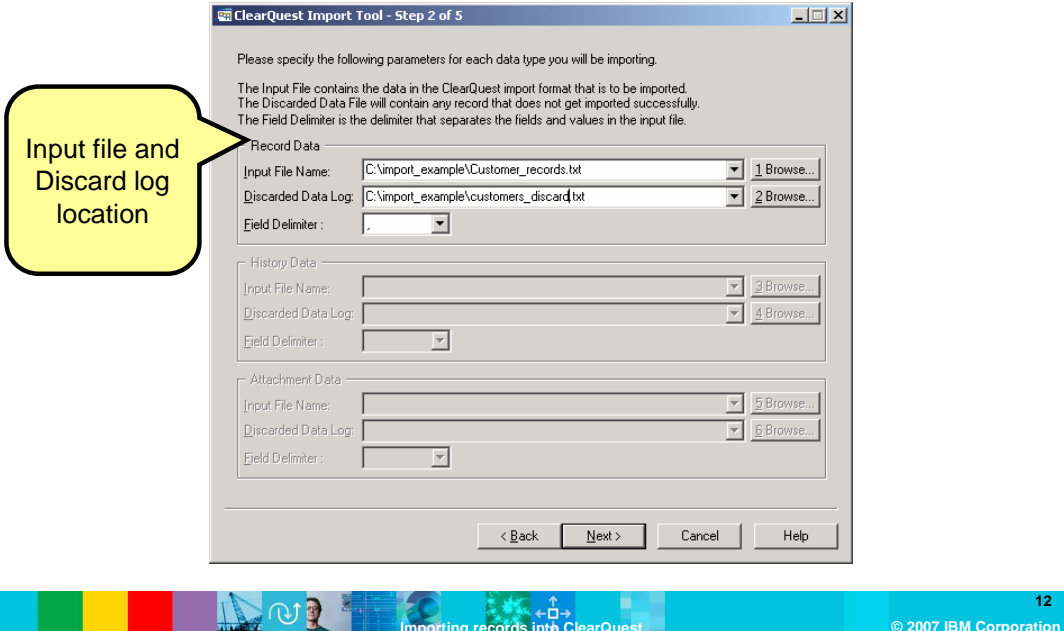
This example shows only the import of the Customer record but the same method works for other stateless records.

In this example, only record data for the stateless records are being imported and no duplicates. This is the most common example of how you would import stateless records.

Enter the record type, specify the type of data you will be importing, and specify if you will be importing to existing data records

Click Next.

Importing customers (continued)



On the second step of the import tool, specify the parameters for each data type that you will be importing.

You should specify a discarded data log file so if any records fail the import, you can make the corrections needed and import the rejected records only.

Select the Input file name, select the Discarded data log, and specify the field delimiter.

Click Next.

Importing customers (continued)

State field

Duplicates

Original ID

ClearQuest Import Tool - Step 3 of 5

Please specify the kind of information you have in your data file(s).

Importing State Values
If your record data input data file has state values, and you would like to import those values, please specify the field column in your file that contains this value.
State Field Column: [dropdown]

Importing Duplicates
 Will you be importing records that are marked as duplicates in your record data input file?
Please specify the field column in your record data input file that contains the parent identifier.
Duplicate ID Field Column: [dropdown]

Importing Record Updates, Duplicates, History, or Attachments
If you will be importing duplicates, history, attachments, or record updates into your ClearQuest user database, each data input file must contain a unique identifier to link the records, history, or attachments stored in the different input files. Please specify the ClearQuest field name that will contain this unique identifier.
ClearQuest Field Name: [dropdown]

< Back Next > Cancel Help

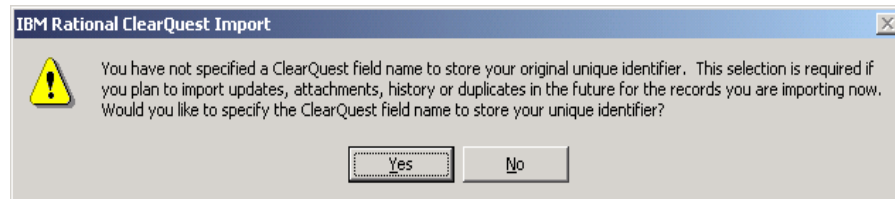
13
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On the third step of the import tool, you will specify the kind of information you have in your data file or files.

You do not need to specify states since you will not have duplicates for a stateless record. You also do not need to specify a field to store original IDs. The unique key can be written to so you can just map the unique ID to unique ID. You can then update records later.

Select the appropriate values and click Next.

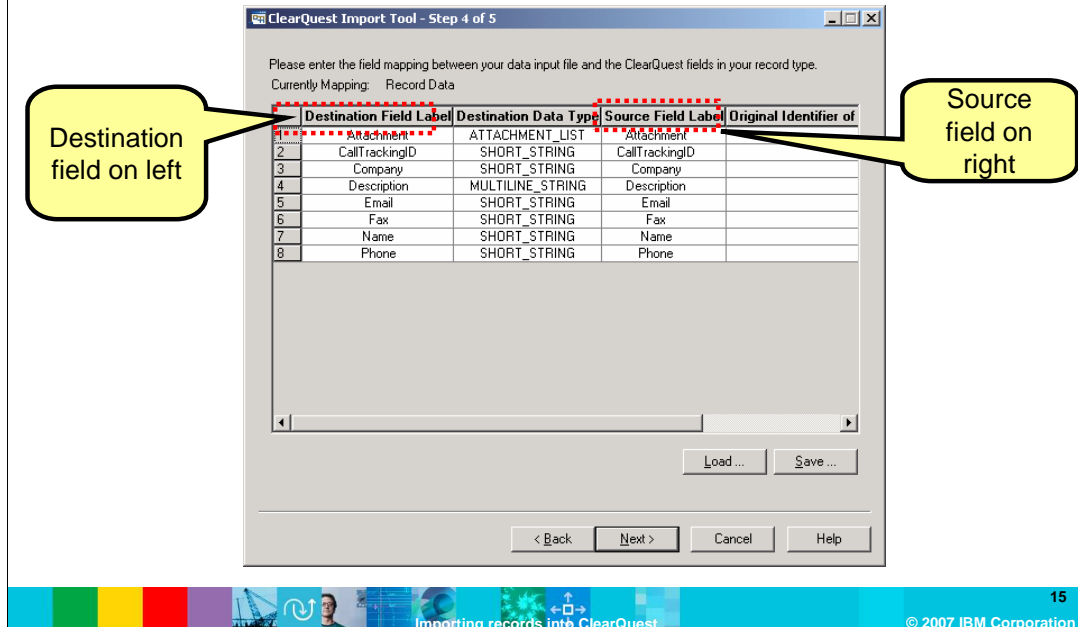
Importing customers (continued)



IBM Rational ClearQuest will prompt you with this dialog box. Since you did not specify a ClearQuest field name to store your original unique ID, you will be asked if you want to specify the original identifier. This is not a necessary step in order to import updates to stateless records.

Answer "no" to this question

Importing customers (continued)



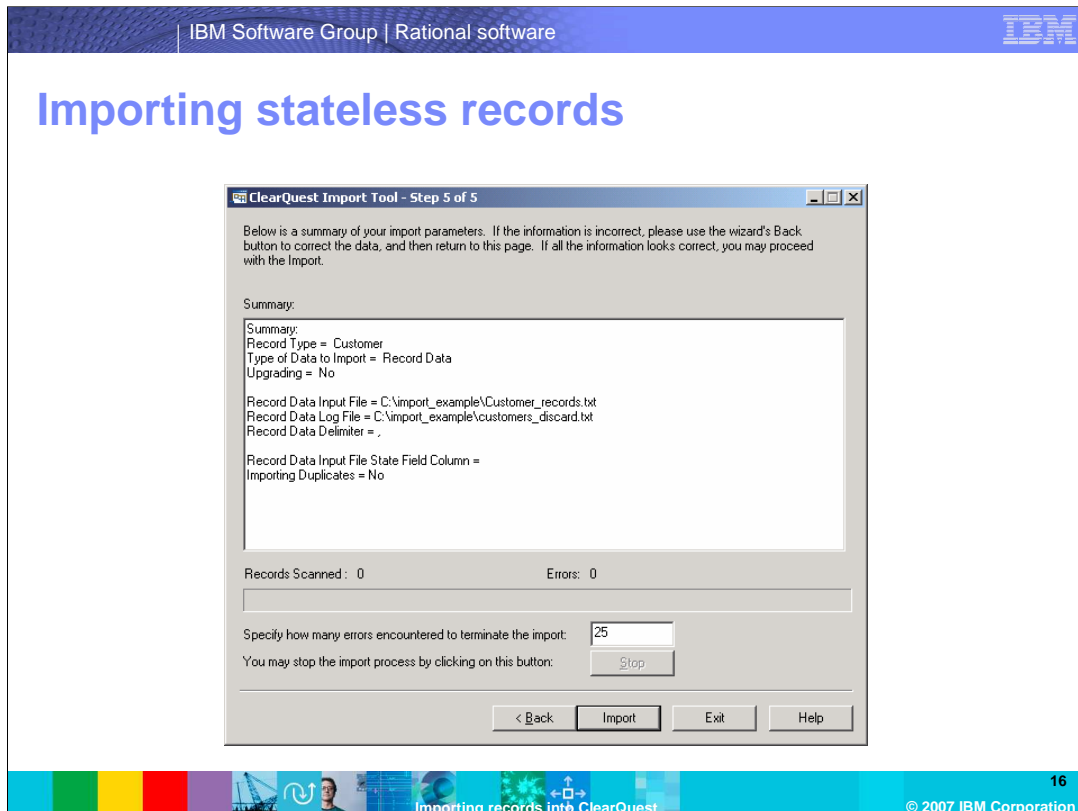
On the fourth step of the import tool, you will be prompted to enter the field mapping between your data input file and the ClearQuest fields in your record type.

It is critical to ensure the fields are mapped correctly. If ClearQuest has exported the records, the field labels should be the same as long as both databases are based on the same schema.

If the schemas do not have the same field labels, map the field labels from the input file (on the right side) to the destination database field labels (on the left). These may seem backwards but this is the way the tool was designed.

Once complete with the mapping, click Next

Importing stateless records



Finally, on the fifth step of the import tool, this dialog presents a summary of the choices you have made. Review this carefully to be sure you have not accidentally checked something incorrectly.

You should specify how many errors can occur before the import will stop. The default is 25. This number means how many records can fail before the import stops. Increase or decrease according to your needs and click Import.

The records from the customer records file will be imported. All the other stateless records should be imported in a similar way.

Section

Importing defects



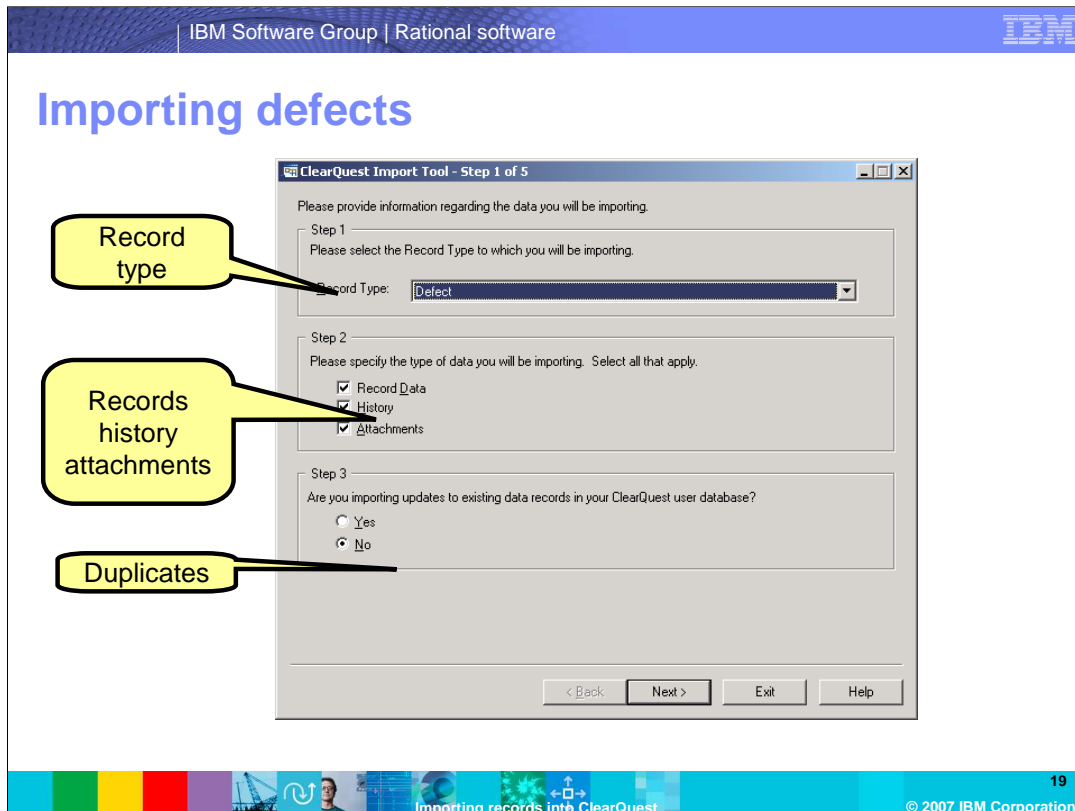
This section covers importing defects with IBM Rational ClearQuest.

Import defects

- Use the import wizard
- Import records
- Import attachments
- Import history
- Import duplicates



This section covers importing defects using the import wizard provided in IBM ClearQuest. You will see an example that imports records, attachments, history, and duplicates.



On the first step of the Import Tool, provide the information regarding the data you will be importing.

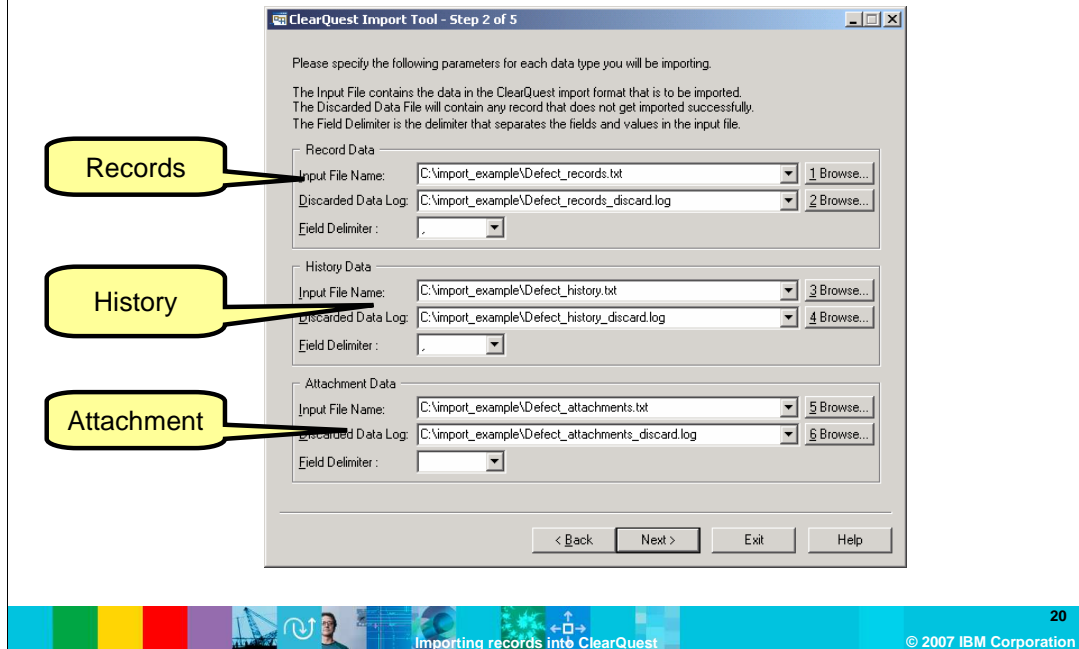
You can import state-based records and related history and attachment records at the same time.

Select Defect for the record type, and specify the type of data you will be importing. In this example, all three options are selected.

When you import the state-based records the first time, specify NO to updates because this is the first time you are putting state-based records.

Click Next.

Importing defects (continued)

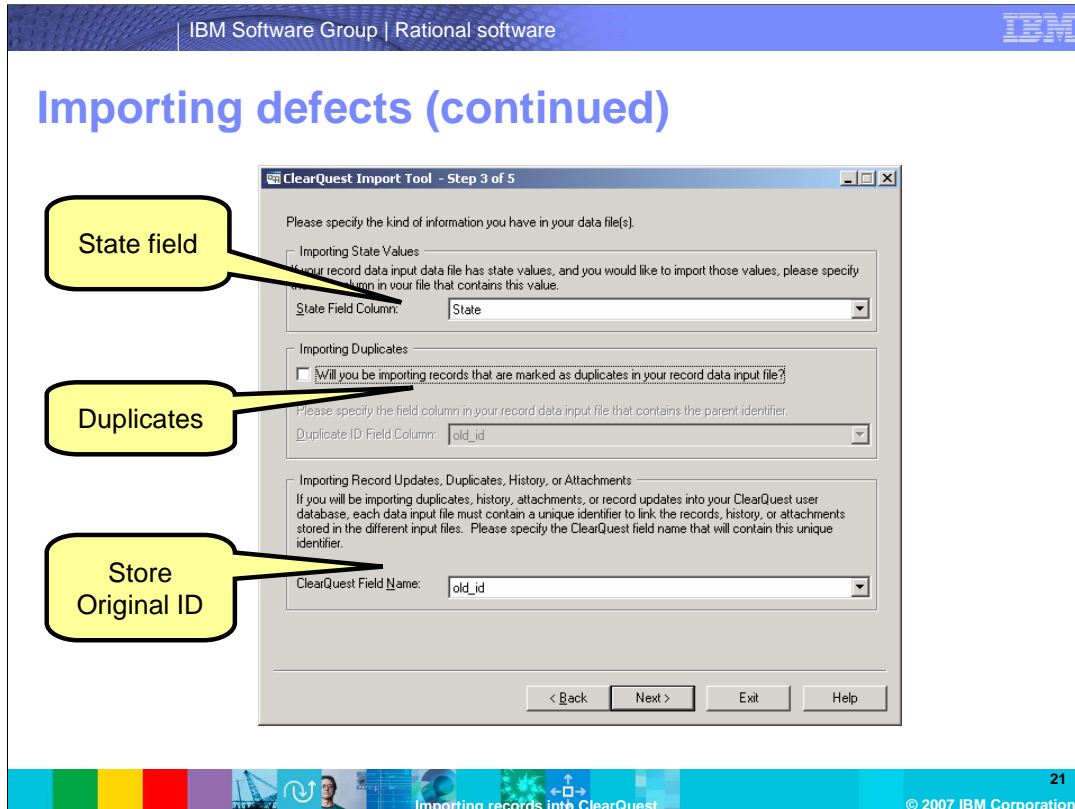


On the second step of the import tool, specify the parameters for each data type you will be importing.

When importing defects, you must specify all the import files, the discard files and the field delimiter. Just as discussed with the stateless record import, specify a discard file to store all the records that failed to import. You will specify a different discard log for the records, history and attachments as shown here.

The field delimiter is the character that separates the fields in the import file. The field delimiters allowed in the import include comma, semi-colon, pipes and tabs.

Once you have finished specifying each file for records, history, and attachment, click Next to proceed.



On the third step of the import tool, you will specify the kind of information you have in your data file or files.

Specify the field in the importing record that contains the state. In this example, the defect record has a State field called "State."

You will want to leave the next option unselected because you will need to import duplicates separately.

Specify the ClearQuest field name. On this form, you also have to specify the field in your database where you will be storing the original IDs of the records. This will allow the history, attachments, duplicates and re-import of the original fields to succeed.

Once complete, click Next.

Importing defects (continued)

ClearQuest Import Tool - Step 4 of 5

Please enter the field mapping between your data input file and the ClearQuest fields in your record type.
Currently Mapping: Record Data

	Destination Field Label	Destination Data Type	Source Field Label	Original Identifi
1	Attachments	ATTACHMENT_LIST	Attachments	
2	customer	REFERENCE_LIST	customer	
3	customer_severity	SHORT_STRING	customer_severity	
4	Description	MULTILINE_STRING	Description	
5	Headline	SHORT_STRING	Headline	
6	Keywords	MULTILINE_STRING	Keywords	
7	Note_Entry	MULTILINE_STRING	Note_Entry	
8	Notes_Log	MULTILINE_STRING	Notes_Log	
9	old_id	SHORT_STRING	id	
10	Owner	REFERENCE	Owner	
11	Priority	SHORT_STRING	Priority	
12	Project	REFERENCE	Project	
13	Related_records	REFERENCE	Related_records	
14	Resolution	SHORT_STRING	Resolution	
15	Severity	SHORT_STRING	Severity	
16	Submit_Date	DATE_TIME	Submit_Date	
17	Submitter	REFERENCE	Submitter	

Buttons: Load... Save... < Back Next > Exit Help

22
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On the fourth step of the import tool, you will be prompted to enter the field mapping between your data input file and the ClearQuest fields in your record type.

Make sure you specify the “id” field on the right side of the dialog box and map it to “old_id” or other field that you have created to specify the original ID.

Importing defects (continued)

ClearQuest Import Tool - Step 4 of 5

Please enter the field mapping between your data input file and the ClearQuest fields in your record type.
Currently Mapping: Record Data

	Destination Data Type	Source Field Label	Original Identifier of Referred Record
1	ATTACHMENT_LIST	Attachments	
2	REFERENCE_LIST	customer	
3	SHORT_STRING	customer_severity	
4	MULTILINE_STRING	Description	
5	SHORT_STRING	Headline	
6	MULTILINE_STRING	Keywords	
7	MULTILINE_STRING	Note_Entry	
8	MULTILINE_STRING	Notes_Log	
9	SHORT_STRING	id	
10	REFERENCE	Owner	
11	SHORT_STRING	Priority	
12	REFERENCE	Project	
13	REFERENCE	Related_records	old_id
14	SHORT_STRING	Resolution	
15	SHORT_STRING	Severity	
16	DATE_TIME	Submit_Date	
17	REFERENCE	Submitter	

Load ... Save ...

< Back Next > Exit Help

Original ID
in Old ID

Note that for “reference_list” or “reference” records with back references, ClearQuest specifies where the original ID was stored as shown here.

Importing defect history

ClearQuest Import Tool - Step 4 of 5

Please enter the field mapping between your data input file and the ClearQuest fields in your record type.
Currently Mapping: History Data

	Destination Field Label	Destination Data Type	Source Field Label	Original Identifier of
1	action_name	SHORT_STRING	action_name	
2	action_timestamp	DATE_TIME	action_timestamp	
3	comments	SHORT_STRING	comments	
4	new_state	SHORT_STRING	new_state	
5	old_id	SHORT_STRING	display_name	
6	old_state	SHORT_STRING	old_state	
7	user_name	SHORT_STRING	user_name	

Old_ID

display_name

Load... Save...

< Back Next > Exit Help

Importing records into ClearQuest

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For the Defect History record import, map “display_name” on the right to “old_id” on the left. The “display_name” field now holds the original ID the history is matched with.

Importing defects attachments

ClearQuest Import Tool - Step 4 of 5

Please enter the field mapping between your data input file and the ClearQuest fields in your record type.
Currently Mapping: Attachment Data

	Destination Field Label	Destination Data Type	Source Field Label	Original Identifier of
1	Attachments	ATTACHMENT_LIST	Attachments	
2	description	SHORT_STRING	Description	
3	old_id	SHORT_STRING	display_name	

old_id

display_name

< Back Next > Exit Help

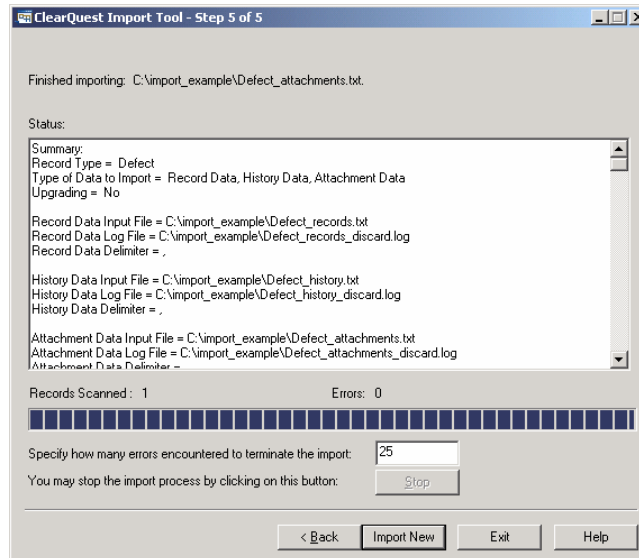
Importing records into ClearQuest

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For the Defect Attachment record import, map “display_name” on the right to “old_id” on the left.

Once you have finished mapping, click Next.

Importing defects (continued)



Finally, on the fifth step of the import tool, this dialog presents a summary of the choices you have made. Review this carefully to be sure you have not accidentally checked something incorrectly.

Specify the number of records import failures you will allow and then click "Import New".

Section

Importing duplicates



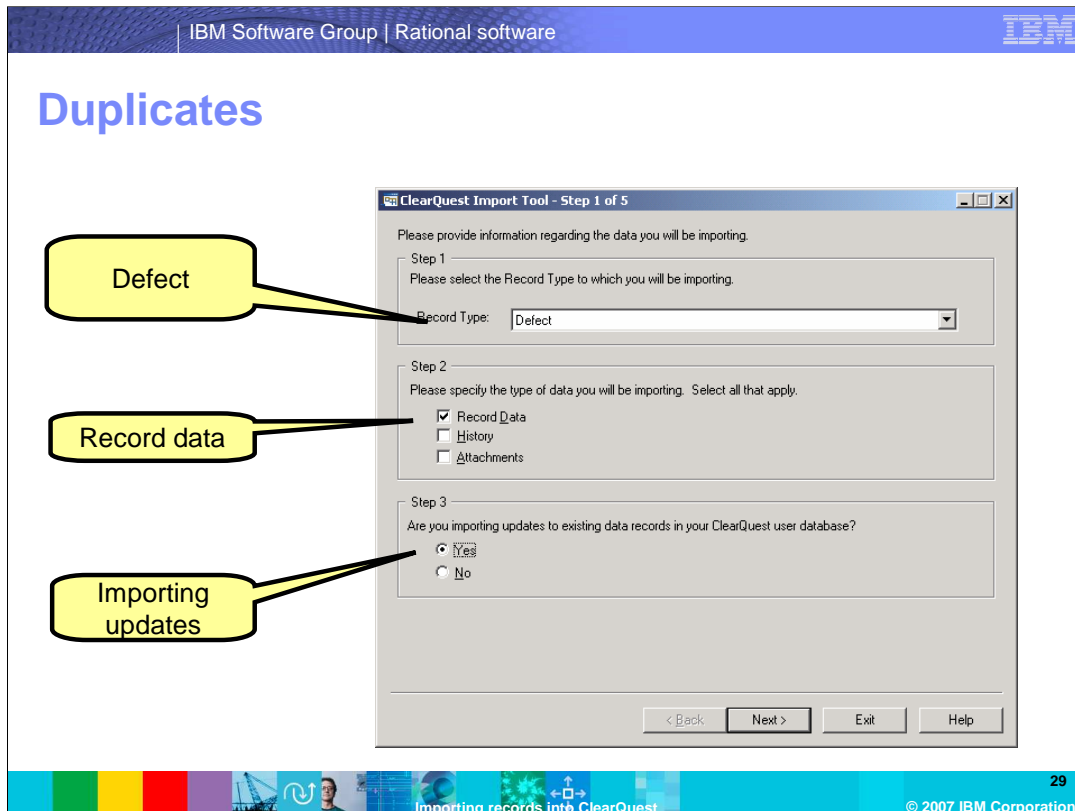
This section covers importing duplicates with IBM Rational ClearQuest.

Duplicates

- Import duplicates after you have imported the main records. In this example, defects were imported before the duplicate file was imported.
- Save the old state of any duplicates in a field in your database. The *oldstate* field was used in this example.



Finally, you can import duplicates. You should import duplicates only after you have imported the main records. Make sure to save the old state of any duplicates in a field in your database. The “oldstate” field that was used in this example.



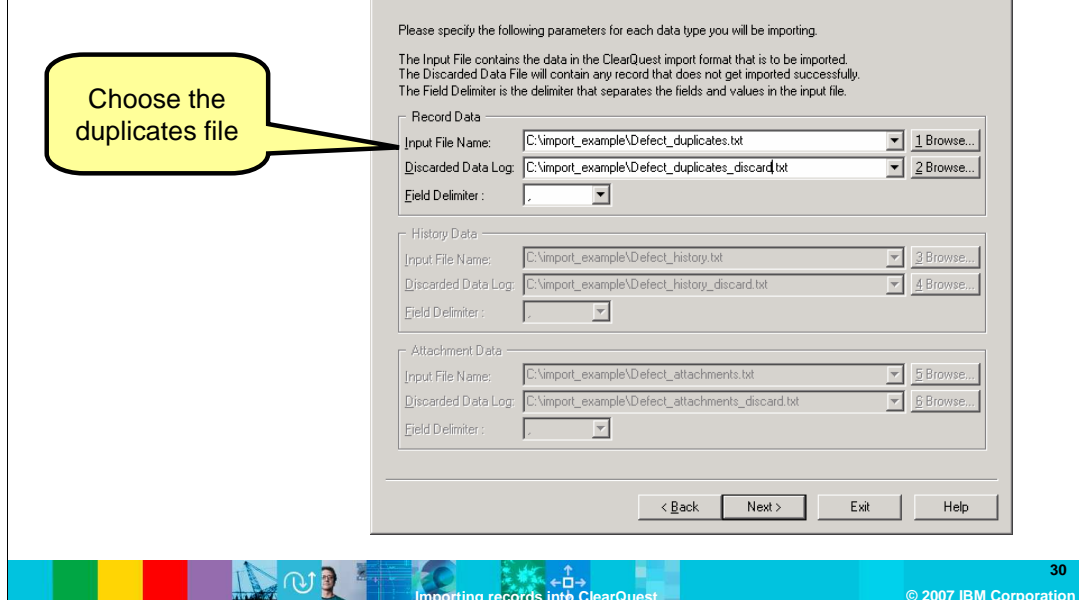
On the first step of the import tool, provide the information regarding the data you will be importing.

Select Defect for the record type and specify the type of data you will be importing. In this case, select only record data.

Since you do want to import duplicates this time around, specify YES in step 3 to updates because you are updating the defect records.

Click Next to proceed.

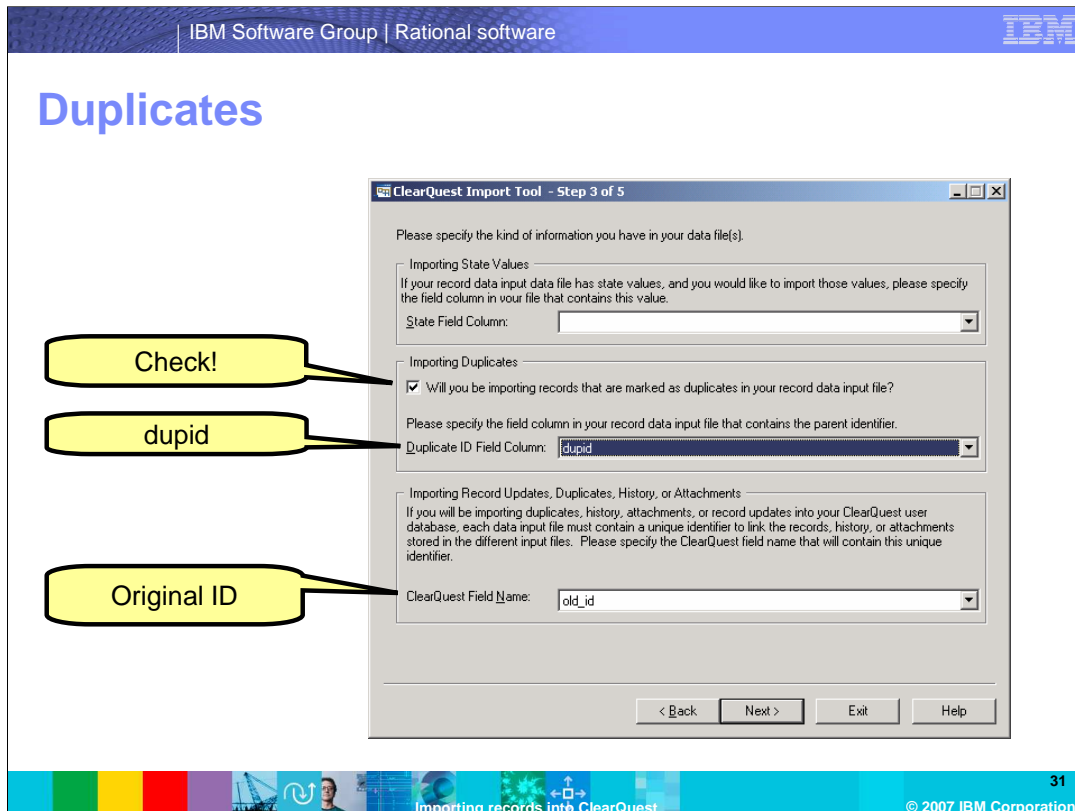
Duplicates



On the second step of the import tool, specify the parameters for the record data type you will be importing.

Select your duplicate file instead of the records file for identifying the duplicates. Select the discard log file and the field delimiter.

Click Next to proceed



On the third step of the import tool, you will specify the kind of information you have in your data file or files.

Leave the state field column blank.

This step is important, check the box prompting you to import records that are marked duplicate in the record data input file.

Select “dupid” as the field in your import file that contains the parent identifier.

Then select the ClearQuest field name, in this case, the old_id (also your original ID field)

Click Next when you are finished

Duplicates

ClearQuest Import Tool - Step 4 of 5

Please enter the field mapping between your data input file and the ClearQuest fields in your record type.
Currently Mapping: Record Data

	Destination Field Label	Destination Data Type	Source Field Label	Original Identifier
1	Attachments	ATTACHMENT_LIST		
2	customer	REFERENCE_LIST		
3	customer_severity	SHORT_STRING		
4	Description	MULTILINE_STRING		
5	Headline	SHORT_STRING		
6	Keywords	MULTILINE_STRING		
7	Note_Entry	MULTILINE_STRING		
8	Notes_Log	MULTILINE_STRING		
	old_id	SHORT_STRING	id	
10	oldstate	SHORT_STRING	oldstate	
11	Owner	REFERENCE		
12	Priority	SHORT_STRING		
13	Project	REFERENCE		
14	Related_records	REFERENCE		old
15	Resolution	SHORT_STRING		
16	Severity	SHORT_STRING		
17	Submit_Date	DATE_TIME		

old_id

id

Load... Save...

< Back Next > Exit Help

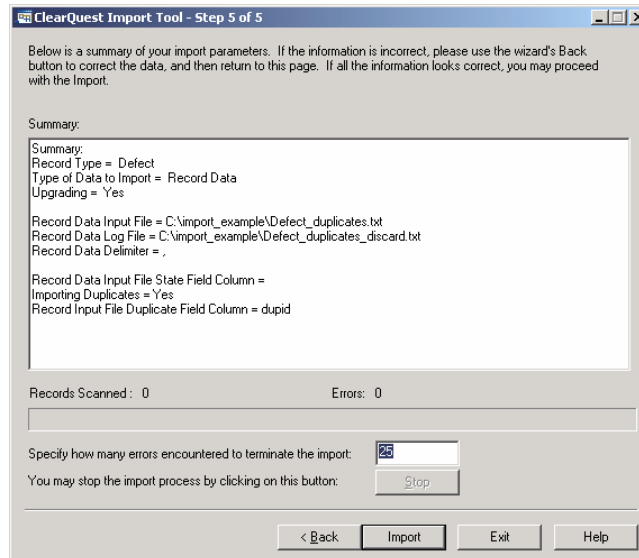
Importing records into ClearQuest

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On the fourth step of the import tool, you will be prompted to enter the field mapping between your data input file and the ClearQuest fields in your record type.

The only two fields you need to map are the “id” field and “oldstate” fields. “id” will be mapped to destination field “old_id”.

Duplicates



Finally, on the fifth step of the import tool, this dialog presents a summary of the choices you have made. Double-check before importing to be sure you have entered all the correct files and you have specified the correct field in the import file that holds the duplicate field column.

Specify the number of records import failures you will allow and then press the Import button.

Any duplicate information will be imported. You should be able to look at the records in the new database and the duplicate relationship should remain even though the IDs are different.

Summary

- Importance of the order of import
- Understanding why you need to save the original record ID
- Importing related records like attachments and history
- Import parent-child relationships
- Importing defects
- Importing duplicates

34

Importing records into ClearQuest

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In summary, you should now know that the order in which you import records is very important! This module also covered the reasons for why you need to save the original record ID, step-by-step instruction on how to import records, related records like attachments and history, parent-child relationships, importing defects, and finally, importing duplicates.

To find more information on this topic or other IBM Rational products, refer to www.ibm.com/rational or the IBM Rational ClearQuest online Help.

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