Speaker Notes

IBM Software Group | Rational software

IBM® Rational® ClearQuest®

Exporting records from ClearQuest

Rational software

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This presentation will cover exporting records from IBM Rational ClearQuest.

Speaker Notes

Module objectives

This introduction helps the
students put the materials
into context.

Make sure the students
understand that this is not an
architecture course.

- The following topics are covered in this section:
    - Exporting records

- Upon completion of this section, you will be able to:
    - Understand how to export records
    - Understand that you need to export all related records

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IBM Rational ClearQuest offers customers the tools to export data from ClearQuest databases so that the data can be used by other applications or by other ClearQuest databases. This module assumes that you are familiar with schema design and you are using ClearQuest 7.0 or greater. Note: In earlier ClearQuest versions, there was a ClearQuest export tool but in ClearQuest 7.0, this functionality is built into the ClearQuest client.

If you are exporting data to another ClearQuest database, you can choose the ClearQuest import format and correctly formatted files will be created. If you are exporting to another data source, you have other options for formatting as discussed in the following slides.

Speaker Notes

Export related records

- Export all ClearQuest records that will be needed
  - ▶ If you have *record1* with a reference to *record2* and *record2* has a reference to *record3*, export all of these records. The order of the export of the records is not important.

- If you are exporting records that will be exported into a ClearQuest database related to a different schema repository and your records contain references to users
  - ▶ Use the export functionality in User Administration to export 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

- If you are exporting users for another application's use, use the export functionality in the ClearQuest client.

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When exporting records from 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. Follow down through all the referenced records to see if they reference other record types.

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.

If you are exporting records that will be imported into a ClearQuest database related to a different schema repository and your records contain references 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 you can only import users into a ClearQuest database through the user administration import functionality.

EXAMPLE: ClearQuest export

- Export a ClearQuest sample database based on the DefectTracking schema for the export

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The following slides will walk you through exporting in IBM Rational ClearQuest.   This example exports records from a ClearQuest sample database based on the DefectTracking schema. Note: The following example will show the export of a stateless record, but state-based records are also exported in the same way.
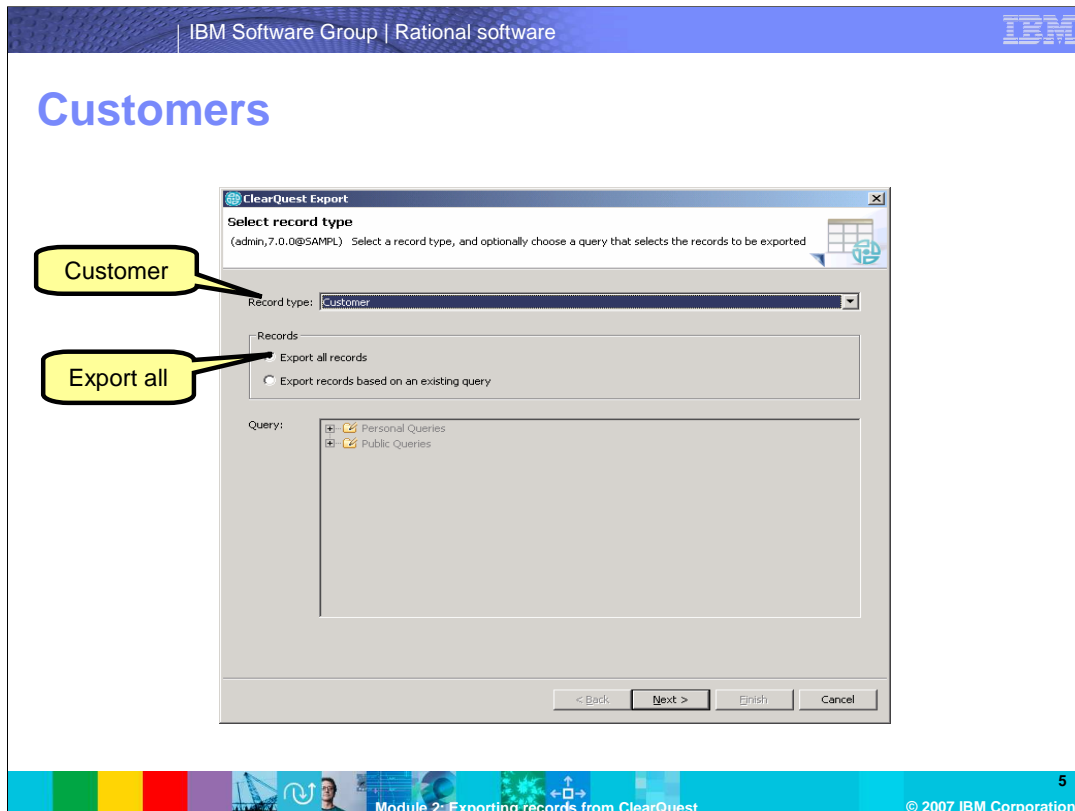
On this first step of the export tool, select the information regarding the data you will be exporting, including record type, queries, and so on.

To start the wizard, select **File > Export > Records** to export Customer records. Then select *Customer* as the record type. Finally, select either "Export all records" to export all records or "Export records based on an existing query" to export only a limited set of records. In this screen capture, the "export all records" option has been selected.

When finished, click Next.
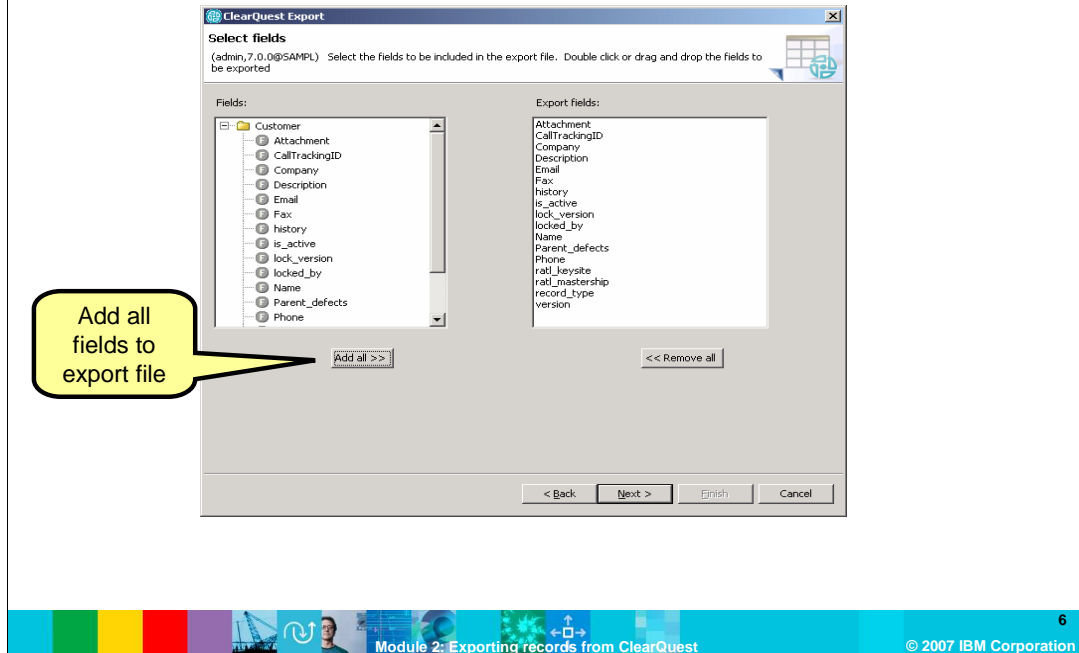
On this second step of the export tool, select the fields to be included in the export file. Click "*Add All*. Note that you can either select "Add all" or double-click specific fields to add to the file.
Click Next.

Customers (continued)

ClearQuest Export

Export tool settings
(admin,7.0.0@SAMPL) Specify export output settings

Format: ClearQuest import format

Code Page: UTF-8

Delimiter: ,

Number of records per file: 0
(Enter 0 to include all records)

< Back   Next >   Finish   Cancel

Format

Code page

Delimiter

Number of records

For more information: http://publib.boulder.ibm.com/infocenter/cqhelp/v7r0m0/index.jsp

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On the third step of the export tool, specify export output settings.
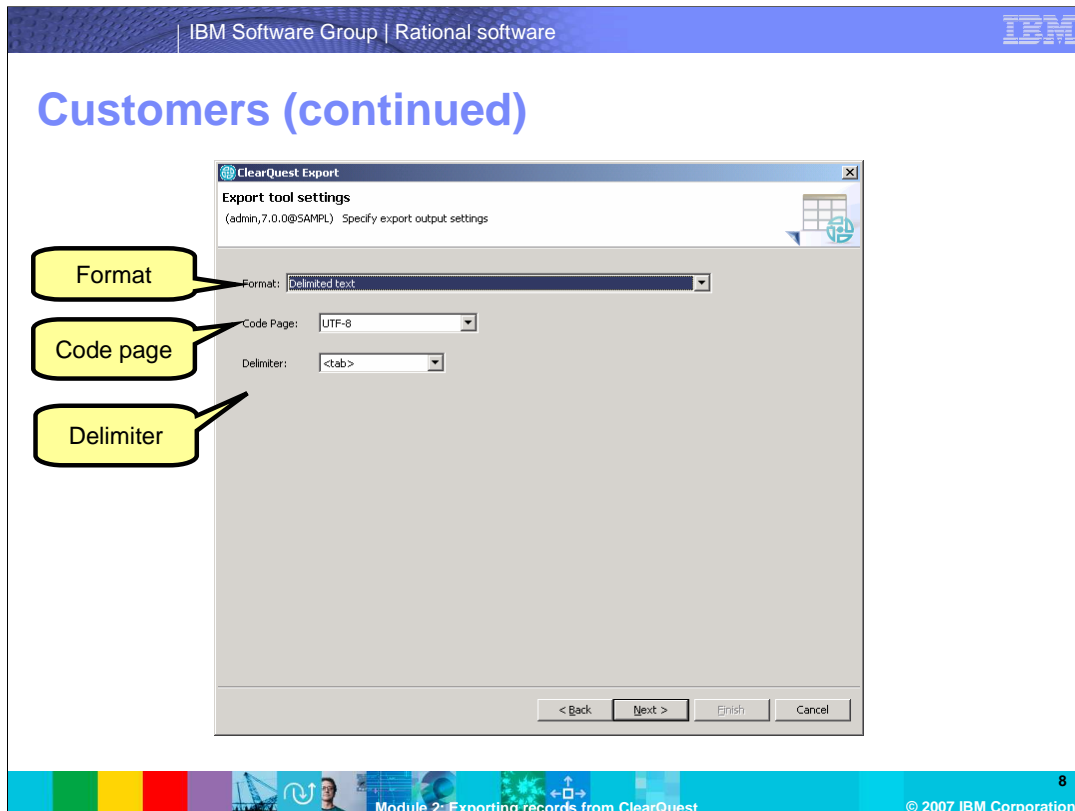
Choose the format for the export file. Your choices are: ClearQuest import format, Delimited text, or XML. If you choose ClearQuest import format, you will be asked to select the code page for the export file, the delimiter and the number of records per file.

Then select the code page type. The code page is the character set for the file. More information about this can be found in ClearQuest help in the ClearQuest client. Information can be also be found in the ClearQuest information center located at the Web address shown here. In this example, UTF-8 has been selected.

Choose the delimiter type. The delimiter can be comma, semi-colon, colon, pipe or tab. This example, uses the comma as the delimiter.

Select the number of records per file. If the number of records per file specified is zero, all records will be included.

Click Next.

Customers (continued)

If you choose *delimited text* for the format, you can choose the code page and a delimiter. On the this third step of the export tool, specify export output settings.

Choose the format for the export file. This example uses the delimited text option.

Select the code page type. This example uses UTF-8.

Choose the delimiter type. This example uses the tab as the delimiter.

Click Next.

Customers (continued)
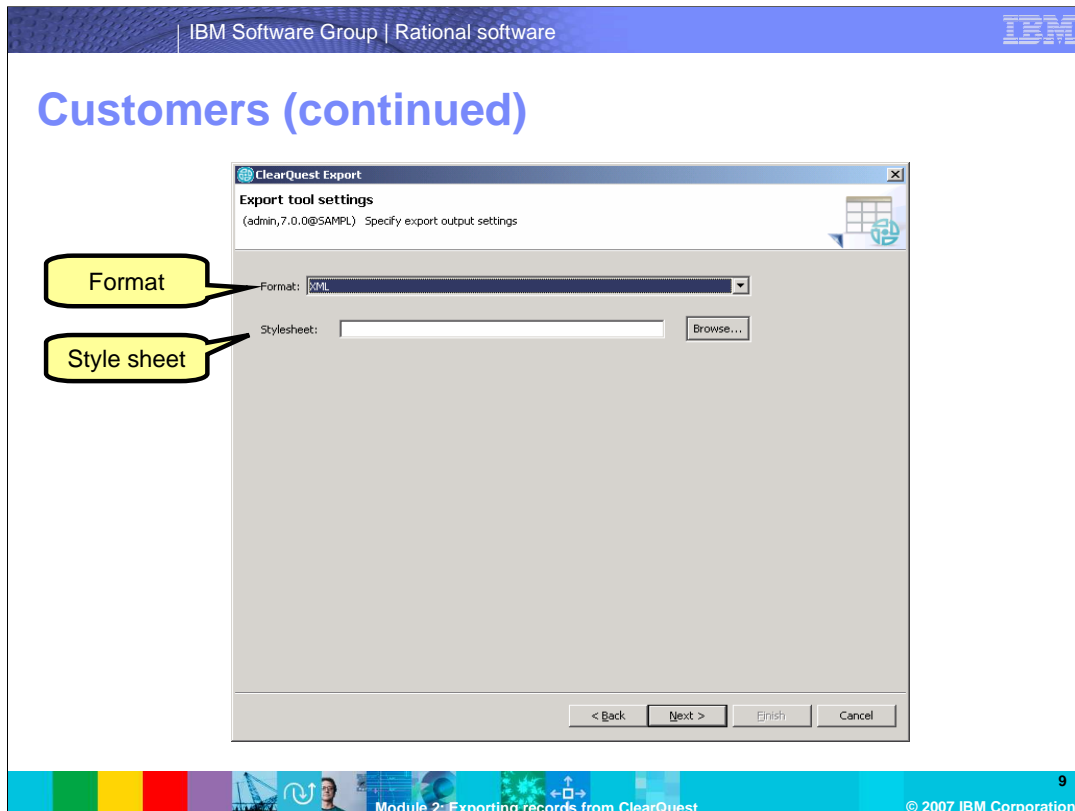
If you chose *XML* as the format, you will need to specify the style sheet on this third step of the export tool.

Choose the format for the export file. This example uses the XLM format option.

Select the appropriate style sheet using the Browse button

Click Next.

Customers (continued)

Export file directory

Export file name

History file name

Duplicate file name

Attachment file name

Attachments directory

ClearQuest Export

Specify file names

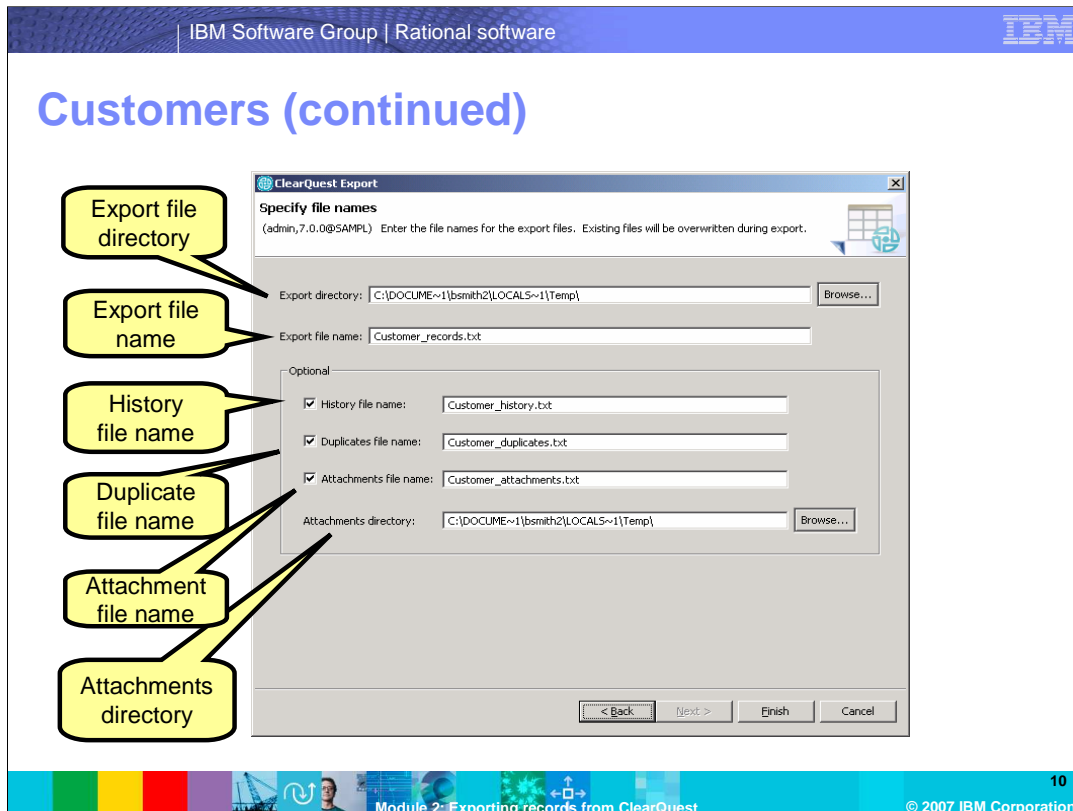(admin,7.0.0@SAMPL) Enter the file names for the export files. Existing files will be overwritten during export.

Export directory: C:\DOCUME~1\bsmith2\LOCALS~1\Temp\   Browse...

Export file name: Customer_records.txt

Optional

☑ History file name: Customer_history.txt

☑ Duplicates file name: Customer_duplicates.txt

☑ Attachments file name: Customer_attachments.txt

Attachments directory: C:\DOCUME~1\bsmith2\LOCALS~1\Temp\   Browse...

< Back   Next >   Finish   Cancel

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On this final step of the export tool, specify the file names for the export files. This window pertains to the "ClearQuest import format" from step 3.
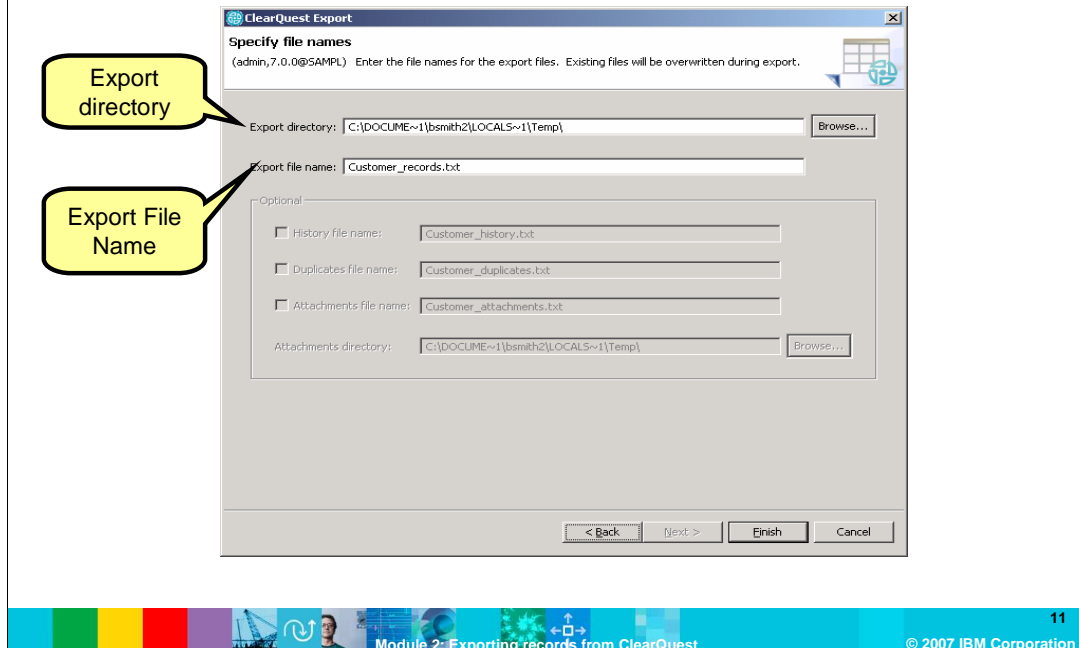
Specify the export file directory

Specify the export file name for the records. Ensure you use distinctive names to differentiate from the record files, history, and so on.

Specify all of the optional file names for exporting the related history, duplicates, and attachment file names and the associated directories. Most users only export the records for stateless records but the option is available if you need these files.

Once you have finished, click Finish to create your export files.

If you had picked the Delimited text or XML format, you would only have the option of specifying the export directory and the export file name. The other files would be unavailable.

Select the export directory and the export file name

Once complete, click Finish to create the export files.

Summary

- Order of export for records is not important

- Need to export all related records

- Stateless and state-based records are exported in the same way

- Choose the format for the export file based on how it will be imported

For additional help:
http://publib.boulder.ibm.com/infocenter/cqhelp/v7r0m0/index.jsp

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In summary, exporting from ClearQuest is much simpler than importing, because you do not need to worry about the order in which you export records, you can choose to export all related records or select just the ones you need, both stateless and state-based records are exported in the same way, and you have many options for the format, delimiter types, character codes, and so on for the export files you want to create.

To learn more about this topic or other IBM Rational products, visit www.ibm.com/rational. Additional information on IBM Rational ClearQuest can be located in the ClearQuest information center page shown here.

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