

# LOADING DATA INTO QUALIFY



Original Software



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BERTIE 2

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## SYNOPSIS

This document discusses the Qualify Functionality to import excel data into your application. This will demonstrate the permissions required, how to set up templates alongside the import functionality utilizing the inbuilt 'Import Tool'

The aim is to allow this to be configured so that importing data into Qualify is not a technical task.

Once set up, end users can be given the ability to load data as needed.

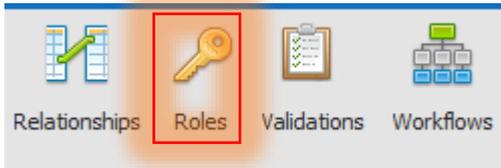
## SETTING PERMISSIONS

Qualify allows you to give permissions to users to access the Data Import tool. Do to this we can either edit a current security role or create a new security role within the management of the application.

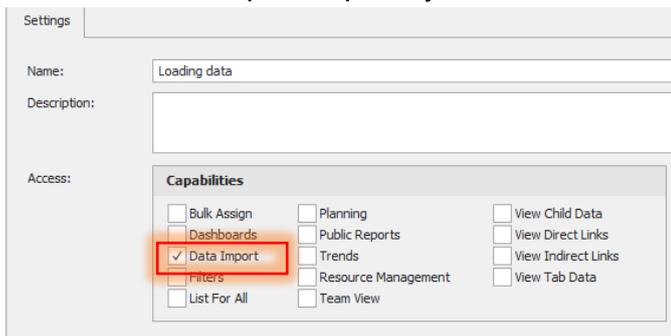
We can control the entities the user can import data into.

### Configuring Qualify

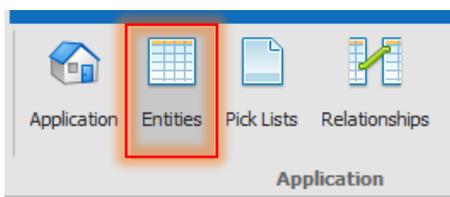
1. Log on as the administrator or a user with sufficient access to alter the Application Definition.
2. Open the Application Definition and select 'Roles' from the top ribbon menu.



3. You can create a separate role or edit an existing role. It should be noted when planning roles, they are inclusive. From the 'Access' window, you will simply need to check the 'Data Import' capability.



4. To control access to specific Entities, you would need to select the Entities icon from the Top Menu bar, and then the Entity you want to be available from the left menu.



5. Select the 'Permissions' tab and allocate the 'Create' permission to the role as required.

A screenshot of the 'Permissions' tab in the software interface. It shows a table with columns for 'Roles', 'Create', 'Delete', 'Core Exec', 'Read', and 'Update'. The 'Loading data' role has 'Create' checked and 'Delete' unchecked. The 'Standard User' role has 'Create', 'Delete', 'Core Exec', 'Read', and 'Update' all checked.

Roles	Create	Delete	Core Exec	Read	Update
All Permissions	<input checked="" type="checkbox"/>				
Loading data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>				

## IMPORTING EXCEL DATA INTO AN ENTITY

### File format

Qualify supports both the legacy and current Microsoft Excel Spreadsheets (XLS and XLSX). The data can be organised in multiple sheets in the Workbook, however only one sheet can be loaded at a time.

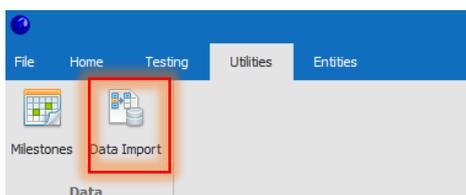
The top line is seen as a column name, each row after the header would constitute one record to be loaded. The Excel sheet can contain data this is not loaded into Qualify, however it should contain all of the required properties on the Entity.

Best practise we would have the column names the same as the property names on the Entity. This is simply for clarity when mapping the data. It should be checked that there are no blank lines in the data, Qualify will attempt to load this and substitute the missing data in the required fields for the defaults.

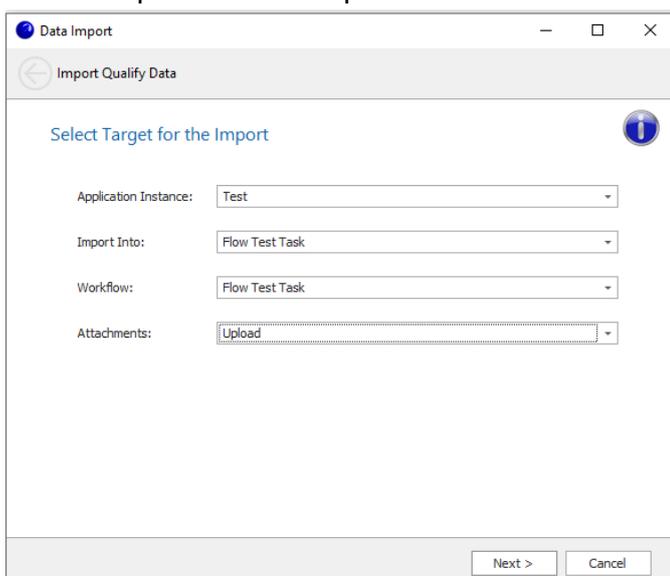
Having an agreed data format allows mappings to be reused.

### Loading Top level Data

1. You will need to access the Data Import tool via the instance on Qualify. From the top menu tabs select Utilities/Data Import.

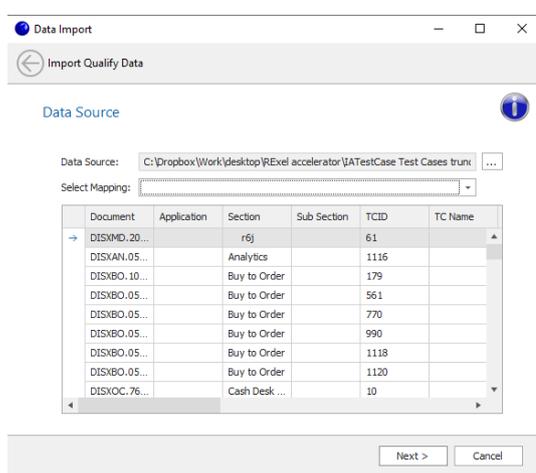


2. This will open the Data Import screen.

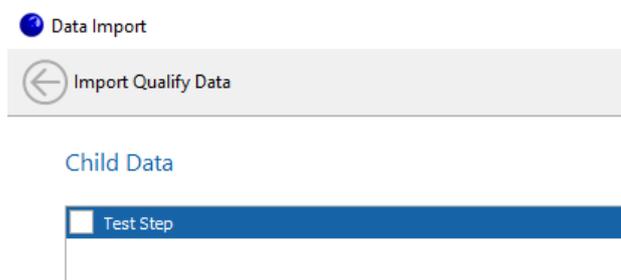


- a. **Application Instance** This shows the current Instance you are loading data into and can't be changed.

- b. **Import Into** You will need to select the Entity you are loading into from the drop down list. Only Entities you have the create permission for, will be displayed.
  - c. **Workflow** If the Entity has a choice of workflow you are able to select which one should be used for the loaded records. In most cases this will be blank or you will have one Workflow that must be selected.
  - d. **Attachments** If you are loading attachments you can select if these should be loaded as 'Upload' where they will be uploaded to the database. Or 'Attach' where the data is not uploaded but held on a location accesable to all clients.
3. This will open the 'Data Source' screen, you will need to select the Excel file from 'Data Source'. If the file contains multiple sheets you will be prompted to select one. 'Select Mapping' will display any saved import definitions relevent to the Entity. If you have one set up and the file is in the same format this can be selected. You can then simply select next through the screens.

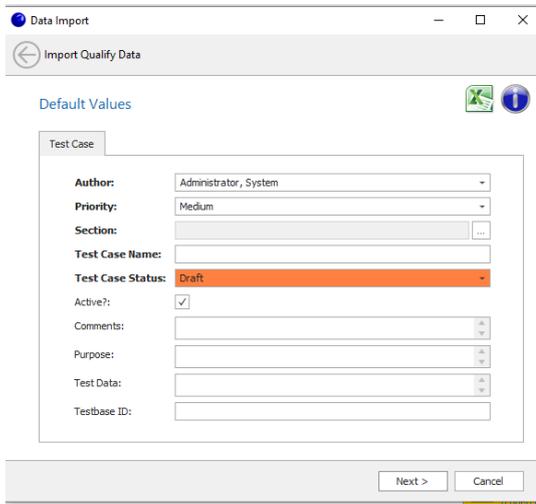


4. If the Entity we are loading data into has child data, you will be prompted to load that data at the same time. This however is only applicable at this stage if the data is on the same sheet and row we selected in the previous step. To load child data at this point it must be a one-to-one relationship. If this is not the case, we will need to load the data and link to the parent record.

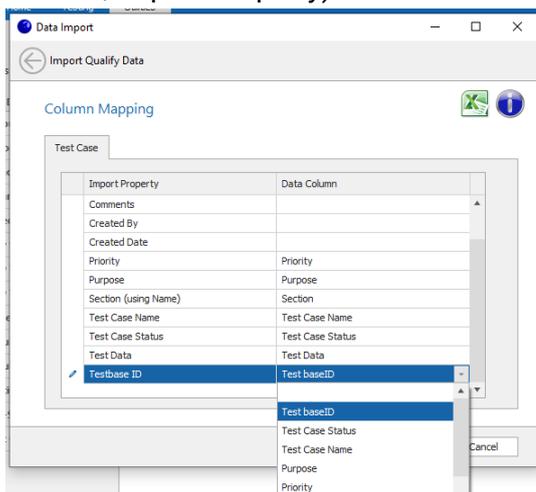


5. The 'Default Values' screen allows you to select a default should the data not be present in the data file. The properties in bold will need populating as these are required fields. Care should be taken on deciding the values, for example it would not cause a problem to default 'Priority' to Medium. However, creating a default for the

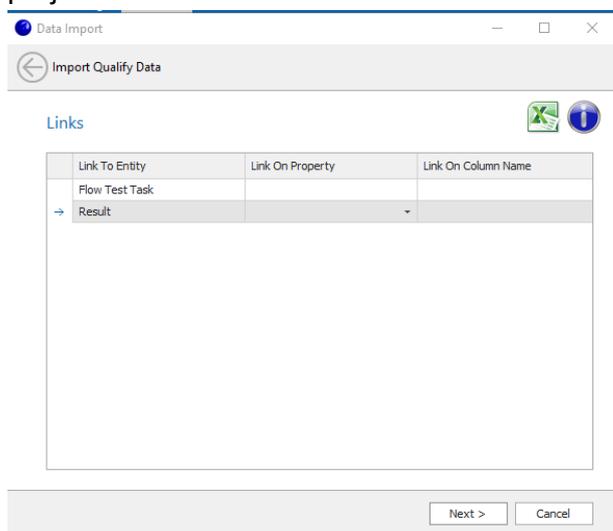
'Test Case Name' would cause problems, you may want to decide that you would want to highlight this missing data with a default such as 'XXX' or 'Error'. This can then be simply checked once data is loaded.



- From the Column Mapping screen, you are mapping the properties on the Entity (left column, Import Property) with the Excel sheet columns (right column, Data Column).



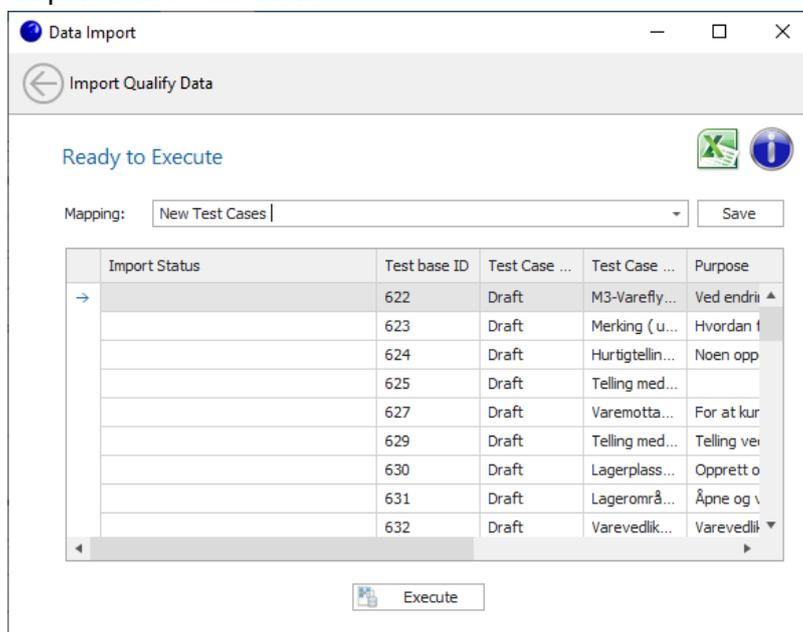
- From the Link screen you can create a link from the record you are loading to a linked Entity. An example of usage would be where you wanted to link to a certain sprint or project. For most of the time this would not be required.



- At the Ready to Execute screen you are able to save the definition you just created, give the Mapping a name and select save.

If the Excel date is in the same format you would then be able to load the data quicker and not go through the defaults and mapping exercise.

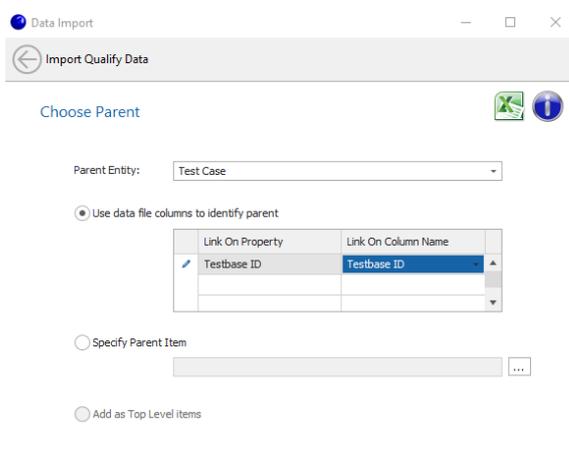
Once ready you can select the 'Execute' button and monitor the progress in the 'Import Status' window.



## Loading Child Entity Data

When loading Child Entity data, you will normally have a key in the Excel data, this will then be used to load the data and be linked to the parent Entity. The foreign key would need to be linked to a unique identifier on the parent record, a Test ID on Test name (if its unique) would be an example.

1. Following the 'Loading Top Level Data' instructions, progress thorough to step 6.
2. At the Choose Parent screen you can Specify a single parent or to use the data files column to select the parent. Here we are using the 'Testbase ID' property on the Entity and the 'Testbase ID' column on the Excel sheet as the foreign key.



3. Complete from step 7 in the 'Loading Top Level Data' instructions.

## Loading Data with Attachments

If you have attachments to add to your records you are loading, this is possible. You can either attach or upload the attachments.

You will need to ensure that the Entity that you are loading data into, has the Attachment tab on the record.

Attaching the document will store the attachment in a shared location or drive, that can then be accessed by Qualify. The attachment is not maintained by Qualify, only the URL.

Uploading will upload the data into the SQL database.

Within the Excel sheet, you will need an additional column with the location of the file you wish to attach.

1. At the initial Select Target for the import, you will need to choose the attachment method.



2. At the Column Mapping screen, you will see an additional 'Attachments' tab, here you need to select the Excel column that contains the location for the attachment (URL Attach is the column header in this example).



3. Looking at the record loaded and the Attachment tab, you will see and have access to the attachment.

