







**Note**

Before using this information and the product it supports, read the information in the “Notices” on page 21.

**First Edition (December 2009)**

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## About this document

This documentation supplement describes some of the new features that are introduced in IBM Rational Focal Point 6.4.1 release. The information in this document supplements the information in the Rational Focal Point online help

This document contains information for the following new features of 6.4.1 release:

- Working with Financier
- Integration with IBM Rational Project Conductor
- Integration with IBM Rational ClearQuest

### Financier overview

Financier is a technical preview tool that is provided as an optional feature that can be installed while installing IBM Rational Focal Point 6.4.1. You can use Financier to build financial models of the expected cost and benefit estimates of your project over time, based on information in IBM Rational Focal Point.

This document contains information about using Financier with Rational Focal Point. To get started with Financier, see the Getting started with IBM Research Financier in Focal Point document.

### Integration with IBM Rational Project Conductor 1.0

IBM Rational Project Conductor is a project and resource management solution that is optimized for software and systems delivery. You can integrate Rational Focal Point with IBM Rational Project Conductor to export or import projects to update project information and related business need information from IBM Rational Project Conductor for all integration attributes that are specified for the project.

This document contains information about enabling the integration and exporting the projects to IBM Rational Project Conductor.

### Integration with IBM Rational ClearQuest 7.1

IBM Rational ClearQuest is a bug tracking system which provides flexible defect and change tracking, process automation, reporting and lifecycle traceability for better visibility and control of the development lifecycle.

This document contains information about enabling the integration by installing Rational ClearQuest for Focal Point™ Interface plugin. For information about synchronizing Rational ClearQuest with Rational Focal Point, see the Rational® ClearQuest® for Focal Point Interface Help available in the Rational Synchronization Server.





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## Working with Financier

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### Configuration of financial information

#### Configuring default rows in time grid attributes

You can set default values for the rows in a time grid attribute. The default value is applied to all cells in the row, except for any cells with manually entered information.

##### Before you begin

You must be an administrator to configure attributes. All default values are numerical, and can be entered as expressions composed of numbers or references to other cells, rows or attributes, combined with the operators that are allowed in time grid attributes.

##### About this task

To configure default values for rows in a time grid attribute:

1. On the **Navigation Bar**, click **Configure** → **Attributes**.
2. Click the module to configure the time grid attribute in.
3. Select or add a time grid attribute.
4. Enter a default value for the row.
5. Click **OK**.

##### Results

The new default value is applied to all cells in the rows that are empty, or that have a previous default value.

##### Example

Default values are composed as expressions. The following types of default row expressions are valid :

- Numbers: 100 or 3,14
- A reference to another cell within the sheet: ='A2'
- A reference to a corresponding cell in another row: ='A row name'
- A reference to a float or integer attribute: ='An attribute name'
- Any operator valid for the time grid attribute: +,-,/,\*, ^
- A combination of numbers, references and operators: ='(A2+'row name')\*100

#### Configuring financial model integration

Use Financier to build financial models of the expected cost and benefit estimates of your project over time, based on information in IBM Rational Focal Point. *Estimates* are uncertain quantities. To express the probability of your estimates, you can input values for likely, or nominal, estimates with high and low bounds in Financier. Financier then analyzes the bounded estimates and computes a likely net present value (NPV) for the life of the project.

## Before you begin

Financier projects are stored as elements in a module. You can open the financial model from within a time grid sheet.

## About this task

**Important:** Use no more than one set of estimated costs and benefits (that is, time grid attribute) in the module when you integrate to the financial model application. Only one matrix attribute can be used for displaying the result; if multiple time grid attributes are in the module, the financial model that is displayed does not reflect which of the estimates that the model is based on.

You need the following attribute configuration to store financial model projects.

To configure financial model integration:

1. Create a new module, or add the attributes that are described in following steps to an existing module.
2. Create a time grid attribute to store nominal, high, and low estimates.
  - a. Create three sheets with common start and stop dates; one sheet for each of the scenario types: high, nominal, and low.
  - b. On each sheet, configure a common set of rows for cost and benefit categories that are related to the projects. Select the **Cost** or **Benefit** check boxes to include the row names in the financial model.
  - c. Click **OK**.
3. Create a matrix attribute to display the financial model in.
  - a. In **Alias**, enter NPV.
  - b. Set **Display as** to Line Chart.
  - c. Select **Flip matrix axes**.
  - d. Click **OK**.

---

## Working with financial information

### Displaying summary columns in time grid sheets

You can temporarily display summary columns in time grid sheets, based on the selected time intervals.

#### Before you begin

When summary columns are displayed, the sheet is read-only. You can display summary columns for any time interval that summarizes the entered format. For example, if the information is entered by quarter, you can display summary columns by year.

#### About this task

To display summary columns:

1. In a display view, click the element and the link to the sheet.
2. Click **Menu** → **Show sum columns**.
3. Select the time interval.

## Results

Additional summary columns are displayed in the sheet, based on the selected time interval.

## Changing time interval display

You can display the information in a time grid sheet by month, quarter or year, depending on the entered format.

### Before you begin

The information is by default displayed in the format it was entered in. When another time interval is selected, the sheet is read-only. You can display the information with any available time interval that summarizes the entered format. For example, if the information is entered by quarter, you can display it by year.

### About this task

To change the time interval display:

1. In a display view, click the element and the link to the sheet.
2. Click **Menu** → **Time interval**.
3. Select the time interval.

## Results

The sheet summarizes the information according to the selected time interval.

## Comparing time grid sheets

You can compare information from time grid sheets in the same attribute by displaying the difference in a comparison sheet.

### Before you begin

**Remember:** The information that is displayed in comparison sheets is read-only.

### About this task

To compare sheets:

1. In a display view, click the element and the link to the sheet.
2. Click **Menu** → **Compare**.
3. Select the compare settings.
  - a. Select **Compare mode**.
  - b. To display the information from the original sheets in the comparison sheet, select **Show both sheets**.
  - c. Select the sheet to compare to. To compare to a sheet in another element, click **Change element** and search for the element.
  - d. Click **OK**.

## Results

A comparison sheet is appended to the original sheets in the attribute. If five comparison sheets are displayed in the attribute, the oldest compare sheet is removed.

**Note:** You can remove the current comparison sheet by clicking **Menu** → **Remove compare sheet**.

## Building financial models based on estimates

Use Financier to build financial models of the expected cost and benefit estimates of your project over time, based on information in IBM Rational Focal Point. *Estimates* are uncertain quantities. To express the probability of your estimates, you can input values for likely, or nominal, estimates with high and low bounds in Financier. Financier then analyzes the bounded estimates and computes a likely net present value (NPV) for the life of the project.

### Before you begin

Financier projects are stored as elements in a module. You can open the financial model from within a time grid sheet.

### About this task

To edit the financial model and display the result in Rational Focal Point:

1. In a display view, click the project.
2. Ensure that all estimate sheets have the same start and end dates.
3. To open the financial model in a separate window in your Web browser, click **Edit with Financier**.
4. Edit the financial model by entering estimated values for costs and benefits over the life of the project: low, nominal, and high. You can either plot your values or enter values in the **Financier**.
5. Save your financial model and return to Rational Focal Point.
6. To refresh the view and display the NPV probability graph as a line chart, click the project name.

## Exporting time grid sheets

You can export individual time grid sheets in .xls format.

### Before you begin

The export includes the current sheet in the current attribute for all elements in the current view, the title attribute and any unique ID attributes for the elements. If you import an exported sheet, each element must include at least one unique ID attribute.

### About this task

To export a time grid sheet:

1. In a display view, click the element and the link to the sheet.
2. Click **Menu** → **Export**.
3. Save the exported file.

## Results

The sheets in the view are exported, including the title for each element, and any unique ID attributes.

## What to do next

You can open a spreadsheet application to view the exported information.

## Importing to time grid sheets

From an .xls file, you can import matrixes that contain data, such as matrix attribute values or time grid values, to a time grid sheet.

### Before you begin

To import information to time grid sheets, you need a file in .xls format. The .xls file must include a column that corresponds to a unique ID attribute in the targeted elements, and a matrix for each element. If the .xls file contains more data than the time grid sheet setup, any extra values are ignored.

### About this task

To import a time grid sheet:

1. In a display view, click the element..
2. Select a time grid attribute.
  - a. Click the link to a time grid sheet.
  - b. Click **Import**.
3. Select import settings.
  - a. Select the .xls file to import from.
  - b. Select the worksheet in the .xls file to import from.
  - c. Select the time grid sheet to import to.
  - d. Click **Import**.

The selected .xls file is displayed.

4. Select a column in the worksheet to map to a unique ID attribute in the target elements.
5. Select the column to import to the time grid sheet.
6. Click **Import**.

### Results

The matrixes from the .xls file are imported to the specified time grid sheet in the elements.

## Printing time grid sheets

You can print individual time grid sheets.

## Before you begin

### About this task

To print the time grid sheet:

1. In a display view, click the element and the link to the sheet.
2. Click **Menu** → **Print**. The sheet is displayed in print format.
3. Click **Print**. The print window is displayed.
4. Print the sheet according to the selected printer settings.

---

## Business rules for financial information

### Calculating IRR for a time grid row

You can use the TimeGridIRR business rule to calculate the internal rate of return of a time grid row. You might use this information to represent the net costs and benefits over time in a project.

#### Before you begin

The result is displayed in the business rule container attribute. If the values in the row change, the IRR is automatically updated.

To use the TimeGridIRR business rule, you need the following information:

- The names of the time grid attribute, sheet, and row to calculate the IRR for.
- The cell in the row to start the calculation from.
- Optional: The start date and end date, either as references to attributes containing start and end dates, or in the format "YYYY-MM-DD". If you do not specify a start or stop date, the entire row is used.

Enter the business rule in the following format:

```
=TimeGridIRR('Time Grid Attribute Name(Sheet Name;Start Cell)',"Time Grid Attribute Name", "Sheet Name", "Row Name")
```

#### About this task

To calculate the IRR for a time grid row:

1. Create a float attribute.
2. In the float attribute, enter your business rule in the specified format.
3. Click **Save**.

#### Results

The IRR of the time grid row is calculated and displayed as a decimal number in the float attribute.

#### Example

From the Financial time grid attribute, you can calculate the IRR for the period 2010-01-01 to 2011-12-31 of the Net Cash Flow row in the Budget sheet, starting in cell A13. To do so, use the following expression:

```
=TimeGridIRR('Financials(Budget;A13)', "Financials", "Budget", "Net Cash Flow", "2010-01-01", "2011-
```

**Tip:** To display the IRR with a smaller number of decimals than the default for a float attribute, you can use the round operator; for example, to display 0.25 rather than 0.25345678:

```
=round(100* (TimeGridIRR('Financials(Budget;A13)',"Financials","Budget","Net Cash Flow")/100)
```

## What to do next

Now, you can compare the IRRs of different projects in a portfolio.

## Calculating NPV for a time grid row

You can use the TimeGridNPV business rule to calculate the net present value of a time grid row. You might use this information to represent the net costs and benefits over time in a project.

### Before you begin

The result is displayed in the business rule container attribute. If the values in the row change, the NPV is automatically updated.

To use the business rule TimeGridNPV you need the following information:

- The names of the time grid attribute, sheet, and row to calculate the NPV for.
- The cell in the row to start the calculation from.
- The rate, either as a reference to an attribute where the rate is stored, or as a number, "0.05" or "5%".
- Optional: The start date and end date, either as references to attributes containing start and end dates, or on the format "YYYY-MM-DD". If you do not specify a start or stop date, the entire row is used.

In the business rule container attribute, enter the business rule in the following format:

```
=TimeGridNPV('Time Grid Attribute Name(Sheet Name;Start Cell)',"Time Grid Attribute Name", "Sheet Name", "Row Name", 'Rate Reference')
```

### About this task

To calculate the NPV for a time grid row:

1. Create an integer attribute.
2. Enter your business rule in the specified format.
3. Click **Save**.

### Results

The NPV of the time grid row is calculated and displayed in the integer attribute.

**Note:** NPV is calculated as a decimal number. To display NPV as a decimal number, enter the business rule in a float attribute instead.

### Example

From the Financial time grid attribute, you can calculate the NPV of the Net Cash Flow row in the Budget sheet. In this example, the calculation starts in cell A13, and is based on the internal rate that is specified in the Internal Rate attribute in the Rate element in the Project module:

```
=TimeGridNPV('Financials(Budget;A13)', "Financials", "Budget", "Net Cash Flow", 'Project!Rate!Intern
```

## What to do next

Now, you can compare the NPVs of different projects in a portfolio.

## Calculating sum for a time grid row

You can use the SumTimeGridRow business rule to calculate the sum of a time grid row in the given time span.

### Before you begin

The result is displayed in the business rule container attribute. If the values in the row change, the sum is automatically updated.

To use the business rule SumTimeGridRow you need the following information:

- The names of the time grid attribute, sheet, and row to calculate the sum for.
- The cell in the row to start the calculation from.
- Optional: The start date and end date, either as references to attributes containing start and end dates, or on the format "YYYY-MM-DD". If you do not specify a start or stop date, the entire row is used.

Enter the business rule in the following format:

```
=SumTimeGridRow("Time Grid Attribute Name(Sheet Name;Start Cell)","Time Grid Attribute Name", "Sheet Name", "Row Name")
```

### About this task

To calculate the sum for a time grid row:

1. Create an integer attribute.
2. In the integer attribute, enter your business rule in the specified format.
3. Click **Save**.

### Results

The sum of the time grid row is calculated as a decimal number, and displayed in the integer attribute.

**Note:** SumTimeGridRow is calculated as a decimal number. To display the sum as a decimal number, enter the business rule in a float attribute instead.

### Example

From the Financial time grid attribute, you can calculate the sum of the Expenditures row in the Budget sheet. In this example, the calculation starts in cell A1, for the period that is specified in the Start Date and End Date attributes in the Phoenix element in the Projects module:

```
=SumTimeGridRow('Financials(Budget;A1)', "Financials", "Budget", "Expenditures", 'Projects!Phoenix!S
```

**Tip:** If the attributes for start date and end date are located in the same element as the time grid attribute, write the references as Start Date and End Date instead.



## **What to do next**

Now, you can use the sum of the costs in a project to calculate the total project costs in a portfolio.



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## Integration with Rational Project Conductor

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### Specifying the Rational Project Conductor server URL and integration attribute aliases

To export projects from IBM Rational Focal Point, you need to specify the IBM Rational Project Conductor server URL. You also need to configure the integration attributes for the projects and business needs.

#### Before you begin

Before you set up the integration, note the URLs of the Rational Focal Point servers that you are about to access.

#### About this task

To set up a connection to a Rational Project Conductor server and configure the integration attributes:

1. Connect to a server:
  - a. In Rational Focal Point, click **Configure** → **Integrations**
  - b. Click **Add connector**.
  - c. Select a view that displays projects.
  - d. Add one or more Rational Project Conductor servers by entering the URL and server name; for example, `https://www.example.com:9443/jazz/`.
  - e. Click **Save**.
2. Configure the integration attributes and corresponding aliases for the project:
  - a. Click **Configure** → **Attributes** and select the project module.
  - b. In the project module, verify that integration attributes for proposed start date, proposed finish date and project link are available, or create those attributes. Optionally, you can set up additional integration attributes.
  - c. Click **Configure** → **Alias**, and configure the aliases for the integration attributes, as specified in integration attribute aliases.
3. Optional: You can also configure integration attributes for business needs. The business needs can be in different modules, and you can complete these steps for each module.
  - a. Click **Configure** → **Attributes** and select a business need module.
  - b. In a business need module, verify that the integration attributes that you want are available, or create those attributes.
  - c. Click **Configure** → **Alias**, and configure the aliases for the integration attributes, as specified in integration attribute aliases.

#### What to do next

When the integration is set up, click **Application** → **Login Page** to verify that the login page settings specify the **Login or Balancer URL** that you use to login. This URL is used in Rational Project Conductor to display links to the current Rational Focal Point installation.

You are now ready to export a project from Rational Focal Point to Rational Project Conductor.

---

## Exporting projects from Rational Focal Point

You can export a project and related business needs from IBM Rational Focal Point to IBM Rational Project Conductor. The export creates a new project with the same name in Rational Project Conductor, with the business needs as summary tasks. A link to the new project is created and displayed in Rational Focal Point.

### Before you begin

Before you export projects, set up the integration by specifying the Rational Project Conductor server URL and integration attributes. You must also have a user account on the Rational Project Conductor server.

### About this task

To export projects and business needs:

1. In Rational Focal Point, click **Display** → **Projects**. Select a project.
2. Expand the Links section. In the Related Business Needs row, click the **Edit** icon.
3. Search for specific business needs, or view the entire list of business needs, and select the needs to export. Click **OK**.
4. Click the **Create in Rational Project Composer** icon.
5. Select **Rational Project Conductor server**, enter your Rational Project Conductor login credentials, and click **Log In**.
6. Select the **Program**, **Owner**, and **Calendar** of the project, and click **Create**.

### Results

The selected project and business needs are created in Rational Project Conductor as a new project. After the export is complete, the Project URI field is updated with the URI of the new project. To open the project, click the link. In Rational Project Conductor, the created project is available as a project, and the business needs are available as summary tasks.

---

## Updating project and business need information from Rational Project Conductor

You can update project information and related business need information from IBM Rational Project Conductor for all integration attributes that are specified for the project.

### About this task

To update projects and business needs:

1. In IBM Rational Focal Point, click **Display** → **Projects**. Select a project.
2. Click the **Update from Rational Project Composer** icon.
3. Enter your Rational Project Conductor login credentials, and click **Log In**.

## Results

The selected project is updated with the information from Rational Project Conductor.

---

## Working with projects

### Specifying the Rational Project Conductor server URL and integration attribute aliases

To export projects from IBM Rational Focal Point, you need to specify the IBM Rational Project Conductor server URL. You also need to configure the integration attributes for the projects and business needs.

#### Before you begin

Before you set up the integration, note the URLs of the Rational Focal Point servers that you are about to access.

#### About this task

To set up a connection to a Rational Project Conductor server and configure the integration attributes:

1. Connect to a server:
  - a. In Rational Focal Point, click **Configure** → **Integrations**
  - b. Click **Add connector**.
  - c. Select a view that displays projects.
  - d. Add one or more Rational Project Conductor servers by entering the URL and server name; for example, `https://www.example.com:9443/jazz/`.
  - e. Click **Save**.
2. Configure the integration attributes and corresponding aliases for the project:
  - a. Click **Configure** → **Attributes** and select the project module.
  - b. In the project module, verify that integration attributes for proposed start date, proposed finish date and project link are available, or create those attributes. Optionally, you can set up additional integration attributes.
  - c. Click **Configure** → **Alias**, and configure the aliases for the integration attributes, as specified in integration attribute aliases.
3. Optional: You can also configure integration attributes for business needs. The business needs can be in different modules, and you can complete these steps for each module.
  - a. Click **Configure** → **Attributes** and select a business need module.
  - b. In a business need module, verify that the integration attributes that you want are available, or create those attributes.
  - c. Click **Configure** → **Alias**, and configure the aliases for the integration attributes, as specified in integration attribute aliases.

#### What to do next

When the integration is set up, click **Application** → **Login Page** to verify that the login page settings specify the **Login or Balancer URL** that you use to login. This URL is used in Rational Project Conductor to display links to the current Rational Focal Point installation.

You are now ready to export a project from Rational Focal Point to Rational Project Conductor.

## Exporting projects from Rational Focal Point

You can export a project and related business needs from IBM Rational Focal Point to IBM Rational Project Conductor. The export creates a new project with the same name in Rational Project Conductor, with the business needs as summary tasks. A link to the new project is created and displayed in Rational Focal Point.

### Before you begin

Before you export projects, set up the integration by specifying the Rational Project Conductor server URL and integration attributes. You must also have a user account on the Rational Project Conductor server.

### About this task

To export projects and business needs:

1. In Rational Focal Point, click **Display** → **Projects**. Select a project.
2. Expand the Links section. In the Related Business Needs row, click the **Edit** icon.
3. Search for specific business needs, or view the entire list of business needs, and select the needs to export. Click **OK**.
4. Click the **Create in Rational Project Composer** icon.
5. Select **Rational Project Conductor server**, enter your Rational Project Conductor login credentials, and click **Log In**.
6. Select the **Program**, **Owner**, and **Calendar** of the project, and click **Create**.

### Results

The selected project and business needs are created in Rational Project Conductor as a new project. After the export is complete, the Project URI field is updated with the URI of the new project. To open the project, click the link. In Rational Project Conductor, the created project is available as a project, and the business needs are available as summary tasks.

## Integration attribute aliases for projects

Integrating IBM Rational Focal Point and IBM Rational Project Conductor makes it possible to handle the same project information from a portfolio and a project perspective. As part of the setup, you need to specify integration attribute aliases in Rational Focal Point, that are recognized by both products.

### Purpose

The attribute names can differ in the products, but to share and update the content of the integration attributes, all integration attributes must use the specified aliases.

## Parameters

*Table 1. Project attribute aliases*

Attribute alias	Attribute type	Comment
Manager	Text	Sent to Rational Project Conductor when the project is exported, after that only updates from Rational Project Conductor are received.
ProjectMgmtSyncURI	URL	Required. Received from Rational Project Conductor when the project is created, and cannot be updated.
State	Text	Received from Rational Project Conductor only.
Tasks	Link list or Incoming links	The set of tasks is sent to Rational Project Conductor only. Changes made to task details in Rational Project Conductor are received and updated in Rational Focal Point.

*Table 2. Project and Business needs attribute aliases*

Attribute alias	Attribute type	Comment
ActualDuration	Integer or Float	Received only
ActualFinish	Date	Received only
ActualStart	Date	Received only
ActualWork	Integer or Float	Received only
PercentComplete	Integer or Float	Received only
PlannedEffort	Integer or Float	Received only
PlannedFinish	Date	Received only
PlannedStart	Date	Received only
ProjectMgmtURI	URL	Contains a link to a project or business need in Rational Project Conductor. Set in Rational Focal Point when the project is exported, and cannot be updated.
ProposedDuration	Integer or Float	Received only
ProposedFinish	Date	Required for projects, sent only.
ProposedStart	Date	Required for projects, sent only.

*Table 3. Business need attribute aliases*

Attribute alias	Attribute type	Comment
Effort	Integer or Float	Required
PlannedDuration	Integer or Float	Received only





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## Integrating with IBM Rational ClearQuest

Rational Focal Point can be integrated with IBM Rational ClearQuest, Version 7.1.

With this integration, you can use Rational Focal Point features to manage the records in Rational ClearQuest. You can also utilize the Rational ClearQuest features, such as defect tracking to manage Rational Focal Point projects.

---

### Setting up the Rational ClearQuest integration

To integrate IBM Rational Focal Point with IBM Rational ClearQuest, you must install the Rational ClearQuest for Focal Point Interface plug-in, which is provided with Rational Focal Point, on IBM® Rational Synchronization Server.

#### Installing Rational ClearQuest for Focal Point Interface Before you begin

On an instance of Apache Tomcat 5.5 server that is separate from the instance that Rational Focal Point is on, install the following applications:

- Rational Synchronization Server 1.4
- Rational ClearQuest, Version 7.1 client

#### About this task

To enable the integration with Rational ClearQuest:

1. Log in to Rational Focal Point from the computer on which Rational Synchronization Server is set up.
2. Click **Information** → **Downloads**.
3. In the Integrations download page, click `FocalPointClearQuestInterfaceSetup.zip` to download the file to your computer.
4. Extract the contents of the `FocalPointClearQuestInterfaceSetup.zip` to `Tomcat_HOME\webapps`.

**Note:** While the contents are extracted, do not change the folder structure.

5. By using a text editor, open the `web.xml` file, which is available at `Tomcat_HOME\webapps\TlogicIntegration\WEB-INF`.
6. In the `web.xml` file, add the following code before the `</web-app>` tag:

```
<servlet>
<servlet-name>ClearQuestFocalpointAdminRemote</servlet-name>
<servlet-class>com.telelogic.integration.cqfp.server.CQFocalpointAdminRemoteImpl </servlet-cla
</servlet>
<servlet-mapping>
<servlet-name>ClearQuestFocalpointAdminRemote</servlet-name>
<url-pattern>/admin/cqfpsynchronizer/cqfp</url-pattern>
</servlet-mapping>
```

7. Save the file and restart the services.

**Note:** For information about synchronizing Rational ClearQuest with Rational Focal Point, see the Rational ClearQuest for Focal Point Interface Help in the Rational Synchronization Server.



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