HP ALM

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Business Views Microsoft Excel Add-in
User Guide

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Contents

Welcome to this Guide

Welcome to HP Application Lifecycle Management (ALM).

This guide describes how to use the HP ALM Business Views Microsoft Excel Add-in. It provides installation instructions, descriptive and conceptual information, and step-by-step guidance to help you work with the add-in.

How This Guide is Organized

The *Business Views Microsoft Excel Add-in User Guide* contains the following chapters:

Chapter	Description
"How to Generate a Business View Excel Report in Microsoft Excel" on page 7	Describes how to create Business View Microsoft Excel Reports.
"HP ALM Tab - Microsoft Excel" on page 9	Describes the Business Views Microsoft Excel Add-in.
"Worksheet Configuration Pane" on page 11	Describes the Worksheet Configuration pane of the Business Views Microsoft Excel Add-in.
"Edit Query Dialog Box" on page 15	Describes how to configure the Business Views Microsoft Excel Report using DQL.
"Save Business View Excel Report Dialog Box" on page 19	Describes how to save Business View Excel Reports to ALM.
"Business View Options Dialog Box" on page 17	Describes the log options for the Business Views Microsoft Excel Add-in.

Chapter 1: How to Generate a Business View Excel Report in Microsoft Excel

This task describes how to create Business View Excel reports in Microsoft Excel.

To learn more about Business View Excel reports, see the *HP Application Lifecycle Management User Guide*.

This task includes the following steps:

- "Install the HP ALM Business Views Microsoft Excel Add-in." below
- "Log in to ALM" below
- "Select business views" below
- "Configure the Excel report" on next page
- "Save the report" on next page

1. **Install the HP ALM Business Views Microsoft Excel Add-in.**

   You can install the HP ALM Business Views Microsoft Excel add-in:

   - From the HP Application Lifecycle Management Add-ins page (**Help > Add-ins**).
   - From the Analysis module of HP Application Lifecycle Management.

   > **Note:** If you do not install the HP ALM Business Views Microsoft Excel add-in from the Add-ins page, you are prompted to install the add-in when creating a business view excel report in the Analysis module.
   >
   > Installing via the Add-ins page allows you to install for only yourself or for all users on the machine. Installing from the Analysis module installs only for yourself.
   >
   > To install for all users, you must have administrator permissions.

2. **Log in to ALM**

   Log in to ALM from Microsoft Excel.

   a. Open Microsoft Excel.

   b. Open the Login screen. In the HP ALM tab, click **Login**

   c. Enter the login information. In the Login dialog box, enter the Server URL, Login Name, and Password, and click **Authenticate**.

   d. Select the project. Enter the Domain and Project, and click **Login**.

3. **Select business views**

   Select the business views for which you want to create Excel reports. You can select multiple business views. Each business view is displayed in a separate Excel worksheet.

a. **Open the Add Worksheet dialog box.** In the HP ALM tab, click **Add** to add business view Excel worksheets in the same Excel book, or click **New Report** to add business view Excel worksheets in a new Excel book. For user interface details, see the *HP Application Lifecycle Management User Guide*.

b. **Select the business views.** Select the business view and click **OK**. To select multiple business views, use the SHIFT or CTRL keys. The new business view Excel worksheets are added and the Worksheet Configuration pane becomes active.

4. **Configure the Excel report**

Configure the report in Excel.

a. **Select the fields to be included in the report.** In the Fields tab of the Worksheet Configuration pane, select the fields to be removed from the report. To select multiple fields, use the SHIFT or CTRL keys. For user interface details, see "Worksheet Configuration Pane" on page 11.

b. **Filter the data to be included in the report.** In the Filter tab of the Worksheet Configuration pane, select the fields to be filtered and enter the filter criteria. For user interface details, see "Worksheet Configuration Pane" on page 11.

> **Note:** You cannot filter based on memo (CLOB) fields.

c. **Sort the report.** In the Sort tab of the Worksheet Configuration pane, select the fields by which the report is sorted and set the sorting criteria. For user interface details, see "Worksheet Configuration Pane" on page 11.

> **Note:** You cannot sort on memo (CLOB) fields.

d. **Edit the query.** In the Advanced tab of the Worksheet Configuration pane, click **Edit Query** to configure the report by directly editing the DQL query. For user interface details, see "Worksheet Configuration Pane" on page 11.

> **Note:** If you edit the query, the other tabs of the Worksheet Configuration pane are disabled and all selection, sorting, and filtering of fields are done directly in the DQL query.
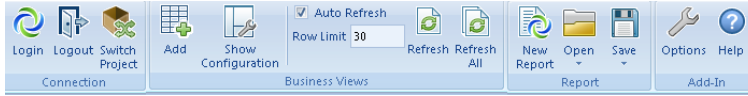
5. **Save the report**

Save the report directly to the ALM Analysis View tree or as a file.

a. **Save the report to ALM.** Click the arrow under the **Save** button and select **Save to ALM**. For user interface details, see "Save Business View Excel Report Dialog Box" on page 19.

b. **Save the report as a file.** Click the arrow under the **Save** button and select **Save to file**. In the search window, navigate to the desired location, enter the desired file name, and click **Save**.

Chapter 2: HP ALM Tab - Microsoft Excel

This tab enables you to create and configure Business View Excel reports.

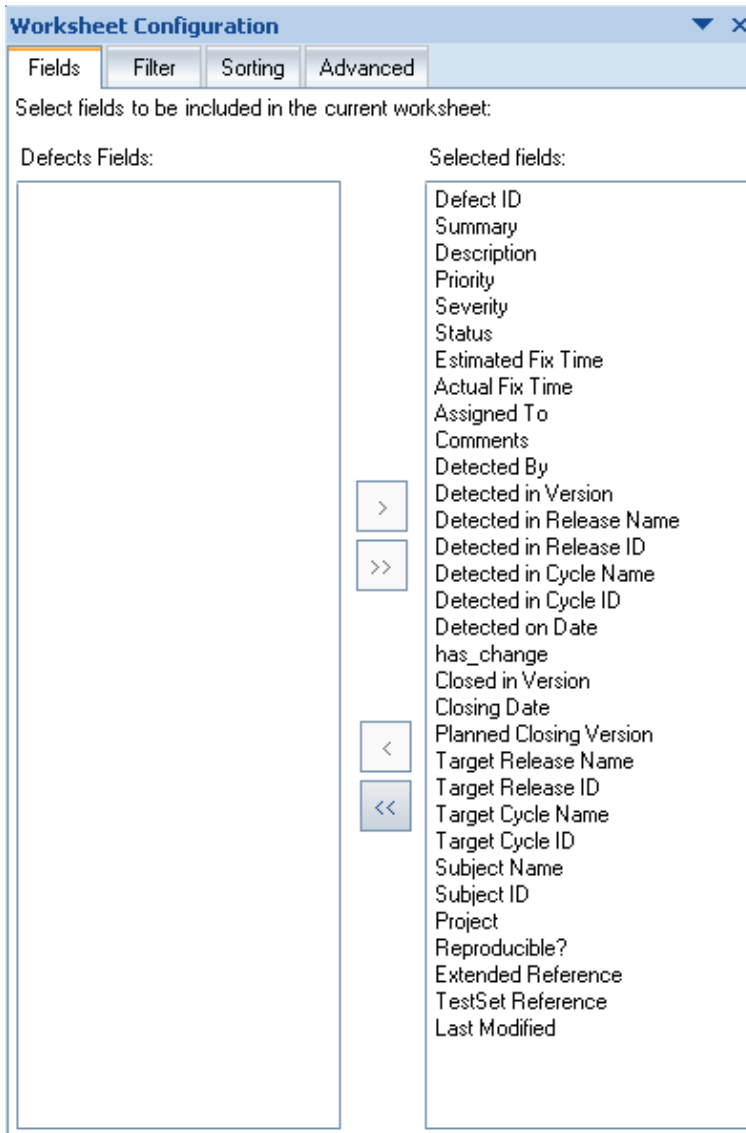| To access	1. On the ALM sidebar, under **Dashboard**, select **Analysis View**.
	2. Expand the analysis tree, and select a Business View Excel report.
	3. Click the **Configuration** tab.
	4. Click **New Excel**. Microsoft Excel opens.
	5. Click the **HP ALM** tab.
Relevant tasks	"How to Generate a Business View Excel Report in Microsoft Excel" on page 7

User interface elements are described below:

UI Element	Description
	Login. Opens the login screen to log in to ALM.
	Logout. Logs out of ALM.
	Switch Project. Opens the login screen to switch to another project in the same ALM session.
	Add. Opens the Add Worksheet dialog box to create a new worksheet for each selected business view.
	Show Configuration. Toggles the Worksheet Configuration pane.
	Auto Refresh. Automatically refreshes the active worksheet each time its configuration is changed.

UI Element	Description
Row Limit 30	**Row Limit.** Sets the maximum number of rows shown in each Business View worksheet. **Note:** Set the value to zero to retrieve all rows.
Refresh	**Refresh.** Refreshes the current worksheet.
Refresh All	**Refresh All.** Refreshes all worksheets.
New Report	**New Report.** Opens the Add Worksheet dialog box to create a new worksheet for each selected business view in a new Excel workbook.
Open	**Open.** Opens a business view Excel workbook from a file or from the ALM Analysis View tree.
Save	**Save.** Saves the current Business View Excel workbook to a file or to the ALM Analysis View tree.
Options	**Options.** Opens the HP ALM Addin Options dialog box. See "Business View Options Dialog Box" on page 17 for details.
Help	**Help.** Opens the HP Application Lifecycle Management Help for the add-in. **Note:** The help opens only when you are logged in to ALM.

Chapter 3: Worksheet Configuration Pane

This pane enables you to configure the Business View Excel report.

To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
Important information	• To hide the Worksheet Configuration pane, click the **Show Configuration** button. Clicking the button again reopens the Worksheet Configuration pane.
	• If you click in the Excel worksheet outside the actual report, the Worksheet Configuration pane closes. Click in the report to reopen the pane.

Relevant tasks	"How to Generate a Business View Excel Report in Microsoft Excel" on page 7
See also	"HP ALM Tab - Microsoft Excel" on page 9

The worksheet configuration pane contains four tabs. User interface elements are described below for each tab (unlabeled elements are shown in angle brackets):

Fields tab

This tab enables you to select the fields to be included in the report.

| UI Element	Description
>	**Move Right.** Moves the selected fields in the **<Business View> fields** column to the **Selected fields** column.
>>	**Move All Right.** Moves all fields in the **<Business View> fields** column to the **Selected fields** column.
<	**Move Left.** Moves the selected fields in the **Selected fields** column to the **<Business View> fields** column.
<<	**Move All Left.** Moves all fields in the **Selected fields** column to the **<Business View> fields** column.
<Business View> Fields	List of the Report Headings that are not included in the **Selected fields** column.
Selected fields	List of the Report Headings that are included in the report.

Filter tab

This tab enables you to filter the data to be included in the report.

UI Element	Description
	Clear Filter. Clears the filter settings defined in the Filter tab.
	Copy Filter Settings. Copies the filter settings to the Clipboard.
	Paste Filter Settings. Pastes the filter settings from the Clipboard.
Criteria	Click to set the filter criteria for the specific field. The **Select Filter Condition** dialog box opens. For more information, see *HP Application Lifecycle Management User Guide*.
Field Name	Alphabetical list of the Report Headings.

Sorting tab

This tab enables you to sort the report.

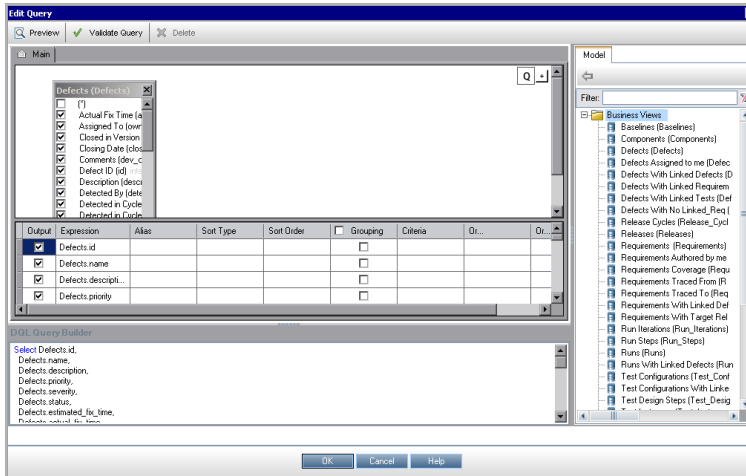| UI Element	Description
>	**Move Right.** Moves the selected fields in the **<Business View> fields** column to the **Sorted fields** column.
>>	**Move All Right.** Moves all fields in the **<Business View> fields** column to the **Sorted fields** column.
<	**Move Left.** Moves the selected fields in the **Sorted fields** column to the **<Business View> fields** column.
<<	**Move All Left.** Moves all fields in the **Sorted fields** column to the **<Business View> fields** column.
≜	**Sort Ascending.** Sorts the selected Report Headings in ascending order.
≂	**Sort Descending.** Sorts the selected Report Headings in descending order.
⬆	**Move Up.** Moves the selected Report Headings higher in the list of sorted fields.
⬇	**Move Down.** Moves the selected Report Headings lower in the list of sorted fields.
<Business View> Fields	List of the Report Headings that are not included in the **Sorted fields** column.
Sorted fields	List of the Report Headings that are included in the sort for the report.

Advanced tab

This tab enables you to configure the report by directly editing the DQL query.

UI Element	Description
Dataset Query	The DQL query used to create the report.
Edit Query	Click to edit the DQL query. The **Edit Query** dialog box opens. For more information, see "Edit Query Dialog Box" on page 15.

Chapter 4: Edit Query Dialog Box

The Edit Query dialog box enables you to configure the Business View Excel report.

To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
	3. In the Advanced tab of the the Worksheet Configuration pane, click **Edit Query**.
Relevant tasks	"How to Generate a Business View Excel Report in Microsoft Excel" on page 7
See also	"Worksheet Configuration Pane" on page 11

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Preview	Generates a preview of the data that is returned by the business view query.
Validate Query	Validates the query. The following checks are performed: • That the DQL syntax is correct. • That the query contains only fields from selected entities.
Delete	Deletes the selected business view from the query.
Main pane	Displays a <business view> dialog box for every business view that has been added to the query, as well as defined relationships between business views.

UI Element	Description
<business view> dialog box	Appears in the Main pane after you add a business view to the query. The dialog box displays all available fields within the business view. Use the checkboxes to select fields to add to the view. **Default:** All fields are included in the query. The checkboxes appear unchecked.
Model pane	Displays available business views. To add a business view to the query, select it and click **Add** ⇦ . Alternatively, you can add business views by dragging them to the Main pane. **Note:** Business views are listed alphabetically according to their Labels, with their technical names in brackets.
<selected fields grid>	Enables you to define filter criteria for business view fields. To add a field to the grid, in the <business view> dialog box in the Main pane, use the checkboxes to select the desired fields. **Tip:** You can use the **Alias** column to change a field's label.
DQL Query Builder	Displays the business view query. The query updates automatically as you add entities and define relationships. You can create and edit a view by entering the query directly in the DQL Query Builder.
Query Results pane	Appears when you click **Preview**. Displays the following information: • **Query Results.** Valid views only. Displays a preview of the view. • **Query Messages.** Invalid views only. Displays messages detailing problems with the view. Place the cursor over the message text to view a tooltip displaying the full message.

Chapter 5: Business View Options Dialog Box

This dialog box enables you to set the options for the Business View Excel report.
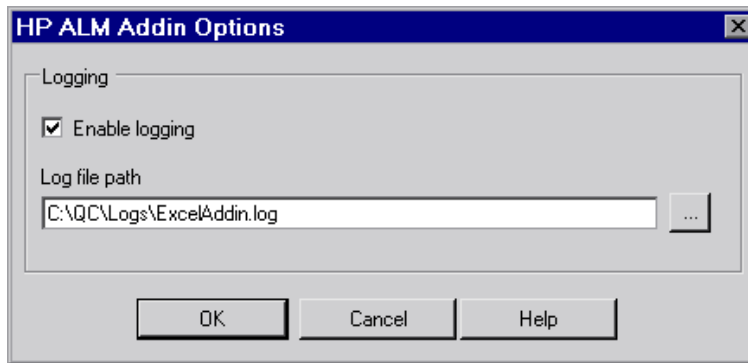
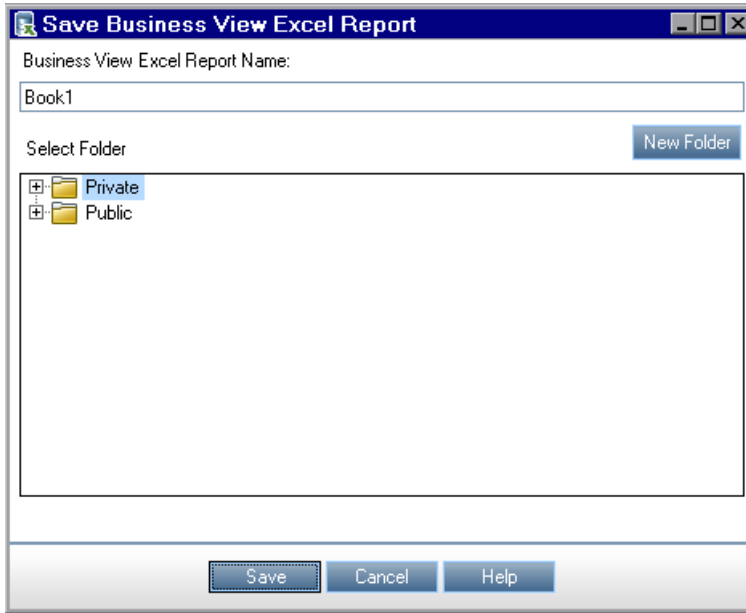|	
To access	In the HP ALM tab in Excel, click **Options**.
Relevant tasks	"How to Generate a Business View Excel Report in Microsoft Excel" on page 7
See also	"HP ALM Tab - Microsoft Excel" on page 9

User interface elements are described below:

UI Element	Description
Enable logging	Click to create a log of all activity that occurs while creating the Excel report.
Log file path	The location of the log file. Click the browse button to select a path to the log file.

Chapter 6: Save Business View Excel Report Dialog Box

This dialog box enables you to save the Business View Excel report to the ALM Analysis View tree.

To access	On the HP ALM tab in Excel, click the arrow under the **Save** button and select **Save to ALM**.
Relevant tasks	"How to Generate a Business View Excel Report in Microsoft Excel" on page 7
See also	"HP ALM Tab - Microsoft Excel" on page 9

User interface elements are described below:

UI Element	Description
Business View Excel Report Name	The name for the new report.
New Folder	Creates a folder in the ALM Analysis View tree. The **New Analysis Item Folder** dialog box opens. Enter the folder name and click **OK**.
Select Folder	The folder in which the report is stored.