

HP ALM Web Client

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User Guide

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Contents

Contents	3
Chapter 1: The ALM Web Client Overview	5
Chapter 2: Using the ALM Web Client	7
Starting the ALM Web Client	10
Displaying what you need	11
Defining the view	11
Filtering	12
Choosing between the details view or grid view	13
Choosing columns	13
Workspaces	14
Common actions	14
Common actions toolbar	14
Adding comments	15
Working with attachments	15
Viewing the history of an item	16
Locate Entity using GoTo Entity ID	17
FAQs	18
Chapter 3: Working with requirements by job function	19
Requirements overview	22
How to get started with defining requirements	23
Managing requirements	23
Getting started with the Requirements module	24
Defining requirements	27
Editing requirements	29
Using Manage mode	29
Using Author mode	30
More about Author mode	32
Monitoring and managing requirements	33
Traceability	34

Using workspaces	34
FAQs for requirements	35
Chapter 4: Working with defects by job function	37
Defect overview	40
Defining defects	41
Updating defects	42
Using traceability	43
Add traceability	43
Remove traceability	44
Chapter 5: Customizing the ALM Web Client	45
Setting requirement type characteristics	45
Setting field attributes	46
Set field attributes	46
Restore field attributes	47
Designing and managing forms	47
Working with business rules	50
Understanding business rules	50
About business rule activation	52
Defining business rules	53
Defining actions	54
Defining conditions	55
FAQs for business rules	57
Chapter 6: Managing projects	61
Setting up existing ALM Desktop Client projects for use in the ALM Web Client	62
FAQs for managing projects	63
We appreciate your feedback!	65

Chapter 1: The ALM Web Client Overview

The ALM Web Client offers an alternative user interface for managing the lifecycle of your application, and is part of HP's ongoing commitment to providing innovative products and solutions. ALM Web Client is user-friendly and easy to navigate, and together with its new features and functionality, shortens work processes and provides an improved user experience.

Note: Currently, the modules supported by the ALM Web Client are Requirements and Defects.

Why use the ALM Web Client?

Here are some ALM Web Client benefits.

Pure web client

When using the ALM Web Client, no client components are downloaded to your machine. The lack of a client footprint ensures that:

- You are always working with the most up-to-date client modules
- No residual files clutter up your machine
- Administrator privileges are no longer necessary when using the client
- The ALM Web Client loads more quickly, as expected from a pure web application

Cross-platform and cross-browser

The ALM Web Client modules are not browser-dependent and can be used on various operating systems, such as Unix, Linux, and Mac. See the *ALM Readme* for supported browsers and operating systems.

Work side-by-side

You can keep both the ALM Web Client and the ALM Desktop Client open simultaneously. Changes are visible in both clients after a refresh, data are retained in the same database, and full locking capabilities maintain data integrity.

More functionality

The ALM Web Client has features not available in the ALM Desktop Client, such as:

- **Author mode.** A document-centric viewing mode that enables you to see a list of requirements in a single document view and allows for quick editing of descriptions. This helps you to have a better overall perspective of the requirements.
- **Category Views.** A dynamic hierarchical structure based on virtual folders allows for flexibility in manipulating the view. Views can be updated on-the-fly by selecting new category fields. This flexibility lets you determine the way in which your ALM project data is organized.

Who should use this client?

The ALM Web Client currently supports the Requirements and Defects modules, so the most suitable candidates for using this client are those who use ALM to capture, update, or view data related to requirements or defects. ALM users who work mainly with data analysis should use the ALM Desktop Client until full analysis capabilities are available in the ALM Web Client.

The following are some of the roles that are suited to working with the ALM Web Client:

Business analysts, functional architects, project managers, and product owners	<p>These users can work exclusively in the ALM Web Client to create, update, and view requirements.</p> <p>Users that rely on reports and dashboards to analyze requirements, such as project managers, can work with the ALM Desktop Client as it currently supports a more comprehensive suite of analysis tools. Also, those working extensively with Business Process Modeling should continue to use the ALM Desktop Client.</p>
Developers	Developers can use the ALM Web Client for viewing and updating requirements and defects assigned to their team, or for creating new requirements or defects.
Exploratory testers	<p>These users are less likely to associate defects to tests. Therefore, they can work exclusively in the ALM Web Client to create defects.</p> <p>Testers that associate defects to tests can work with the ALM Desktop Client as it currently supports both the Test Plan and Test Lab modules.</p>
Administrators	Administrators should work in both the ALM Desktop Client and the ALM Web Client to provide access to the ALM Web Client and to customize the user experience.

Note: The roles mentioned above should be considered a partial list of suggested users. There may be other job titles in your organization, with similar responsibilities, who may also benefit from using the ALM Web Client.

See also

- *HP ALM What's New*
-  **Administrators:** "Managing projects" on page 61
-  **Administrators:** "Customizing the ALM Web Client" on page 45

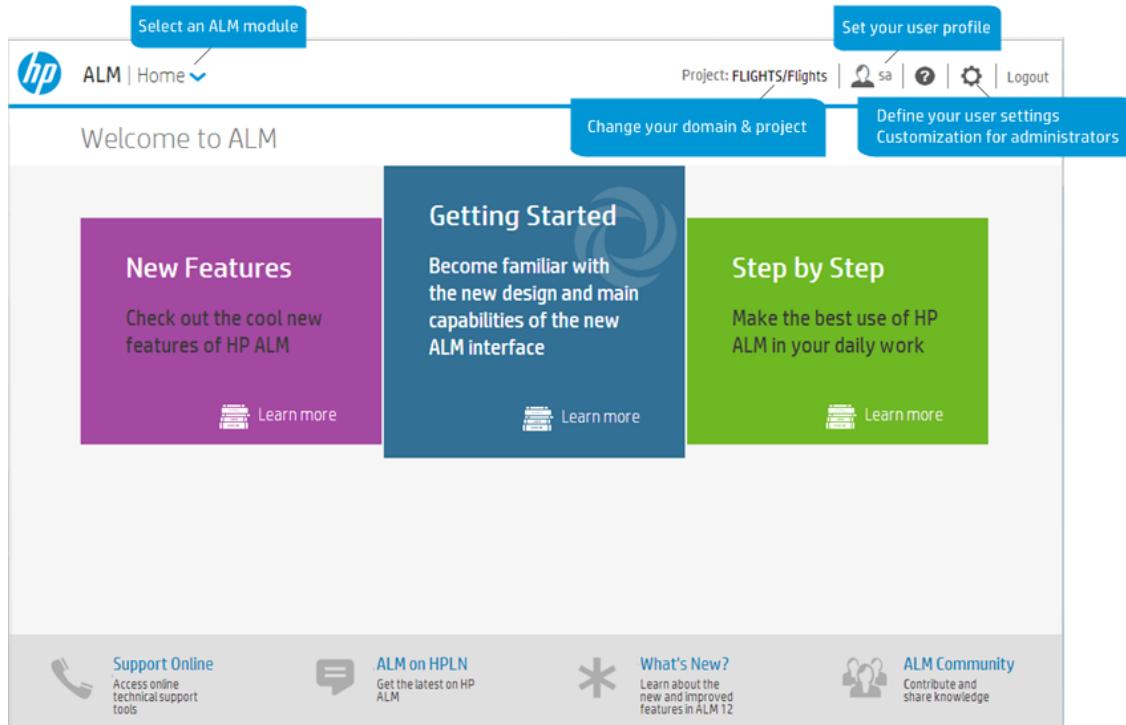
Chapter 2: Using the ALM Web Client

The first time that you log in to a project, the main window opens and displays the Home page. From then on, the view in which you last worked during your previous session will be displayed after logging in to the project.

In the top banner (masthead) you can see the current domain and project, as well as your user name. The masthead is visible in all ALM modules and views.

You can perform the following actions from the masthead:

- Navigate between ALM Web Client modules
- Switch to a different domain and project
- Configure your user profile
- Access the ALM Web Client online help
- Log out of your project
- Customize your user settings
-  Administrators can customize the ALM Web Client



Here is additional information for some of these tasks.

Selecting an ALM Module

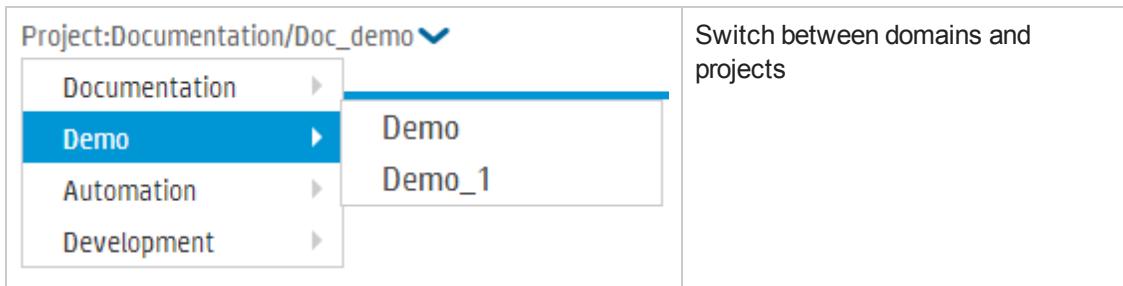


How can this help me?

You have quick and easy access to your work environments.

Note: Only the modules to which you have been given access permissions by your site administrator are listed.

Changing your domain and project



How can this help me?

You can quickly switch to other projects that you are working on from the main window in any module.

Setting your user profile

The screenshot shows a user profile page for "Mark Delta". On the left, there is a placeholder for a photo with the text "Change photo". On the right, there are input fields for "Name" (Mark Delta), "Email" (empty), and "Phone" (empty). Below the fields is a "Update" button.

How can this help me?

Personalize your user profile by adding your contact details and uploading a photo.

Note: When changing your photo, it may take up to 24 hours for your updated photo to be visible to all project users.

[Defining your user settings & customization](#)

User settings

You can enable the **Auto Save** setting so that ALM Web Client saves your changes as you navigate from one entity to another, without being prompted by a dialog box to save your changes.

How can this help me?

You get to choose the way that you prefer to work when using the ALM Web Client.

Enable Auto Save by selecting the **Apply Auto Save** checkbox and clicking **Save**.

Note: Auto Save does not save if you log out of the ALM Web Client before navigating to a different entity. The lock on the entity, however, is released so as not to block other users from modifying the entity.

Customization

The administrator has control over the information displayed in ALM Web Client.

For details: "[Customizing the ALM Web Client](#)" on page 45

 [*How can this help me as the end user?*](#)

Work with your administrator to make sure the data you need is available to you. The administrator can:

- Set up new icons for your requirement types
- Customize forms for easier viewing and editing of entities
- Create business rules to ease your workflow

 [*How can this help me as the administrator?*](#)

Work with your end users to make sure ALM Web Client is meeting their needs:

- By creating forms, you can make sure end users can only view and access information that is relevant to them
- Using business rules, you can make sure the data entered for each entity has "in context" integrity

See also

- "Displaying what you need" on the next page
- "Common actions" on page 14
- "Working with requirements by job function" on page 19
- "Working with defects by job function" on page 37

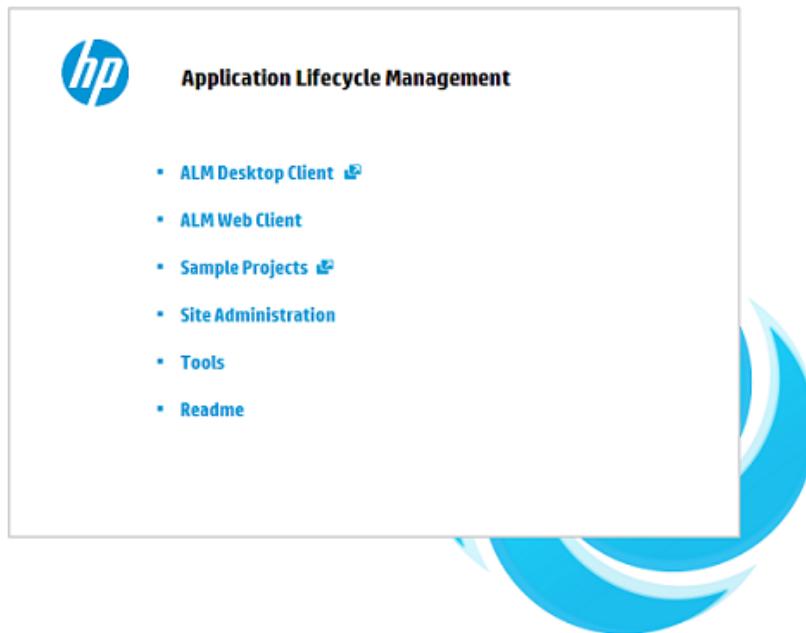
Starting the ALM Web Client

Let's get started.

1.  **Administrators:** Check the prerequisites listed in the *HP ALM Readme*.
2.  **Administrators:** Set up access to ALM projects in the ALM Desktop Client. For details, see "[Managing projects](#)" on page 61.
3. Open your browser and type your ALM URL
`http://<ALM server name/IP address>[:<port number>]/qcbin.`

Contact your administrator if you do not have the URL.

The HP Application Lifecycle Management Options window opens.



4. Click **ALM Web Client**.
5. Select your domain and project.

Now that you have started the **ALM Web Client**, choose the module to work in from the masthead.

Tip: The **ALM Web Client** lists only the modules to which you have access, based on user group permissions set in Site Administration using the ALM Desktop Client.

See also

- "[Managing projects](#)" on page 61 for working in the ALM Desktop Client client
- "[Managing projects](#)" on page 61 for enabling the ALM Web Client using Site Administration

Displaying what you need

There are many ways to set up how information is displayed in ALM. Set up your display according to your own preferences and save the view as a workspace to be reloaded and used in the future.

To watch a movie on how to display what you need, refer to this section in the ALM Web Client Online Help.

 Administrators can determine what end users see by:

- "[Managing projects](#)" on page 61
- "[Customizing the ALM Web Client](#)" on page 45

Defining the view

Click **Define view** and a panel opens allowing you to define how the data is displayed.

Requirements module: You can toggle between a hierarchy view or a flat view.

[Defining category fields](#)

Categories let you separate your data into groups according to specified fields and to define a hierarchical order for displaying the information. This view makes it easier to navigate through large sets of data.

1. Click **Add category field**.
2. Select a field from the drop-down list.
3. Continue adding fields as necessary. You can add up to four category fields.

Requirements module: When the view is set to display requirements in a hierarchy, there may be items that don't meet the category conditions, but that have child requirements that do. The icons of

these items are displayed in gray with a  icon to indicate that they are out of the scope of the current category. If you want to see only those requirements that match the defined category without reference to their hierarchical position, select **Define view > Display requirements with no hierarchy**, and click **Apply**.

Setting sort fields

You can determine the order in which items are displayed by sorting the records according to a specified field.

Note: In the Requirements module, you need to select **Display requirements with no hierarchy** in order to set fields for sorting.

1. Click **Add sort field**.
2. Select a field from the drop-down list. You can arrange the items in ascending or descending order.

When you have finished defining the categories and the sort order, click **Apply**.

To clear a view, click **Define view** and clear the category and sort fields. Click **Apply**.

Filtering

You use a filter to define what data is displayed. When you add a filter, ALM displays the specific items that match the conditions that you set. Filters are useful for monitoring and tracking entities, as they allow you to focus on the information that is important to you. For example, you can create a filter to display all defects assigned to you, with a status field value of *Not fixed*. That way you limit the defects displayed to the items assigned to you, that need your attention.

Adding a filter

1. Click **Add Filter**.
2. Select a field for filtering the items. A filter panel opens with condition statements and values specific to the field that you selected. Where the field has no predefined values, such as a free text field like **Name**, no values are displayed.
3. Click the condition field and select a statement from the list.
4. Select one or more (if relevant) field values from the list. Where there is no list, enter a value.

Continue adding additional filters as required.

Requirements module: When the view is set to display requirements in a hierarchy, there may be items that don't meet the filter conditions but that have child requirements that do. The icons of these items are displayed in gray with a  icon to indicate that they are out of the scope of the current filter. If you want to see only the items that match the defined filter, without reference to their hierarchical position, select **Define view > Display requirements with no hierarchy**, and click **Apply**.

Choosing between the details view or grid view

You can choose between displaying data in a details view or a grid view:

View	Display
Details	<ul style="list-style-type: none"> Detailed information of a specific entity. All fields of an entity, as well as additional information such as comments and history, which are generally too large to view in a grid.
Grid	<ul style="list-style-type: none"> Basic details of a list of entities. Convenient table format. You can also decide which columns to display in the grid: Choosing Columns

Requirements module (Manage mode)

- Hierarchy view.** Click **Details** to display the full details of a selected requirement, or **Children** for a grid view with summary details of the selected requirement's children. To view the details of a specific item , click the ID link of a requirement. Alternatively, you can select the requirement and click **Details Dialog** in the bottom toolbar.
- Flat view.** If you have defined the view to display requirements with no hierarchy , click the ID link of a requirement to open the details view. You can browse the requirements in this view by using the next and previous buttons. Click **Back to Grid** to return to the grid view.

Defects module

By default, defects are displayed in a grid view. Click the ID link of a defect to open the details view for browsing. Click **Back to Grid** to return to the grid view. Alternatively, to view the details of a specific defect in the grid, select the defect and click **Details Dialog** in the bottom toolbar.

Choosing columns

In a grid view, you can choose which columns are displayed. You can also change the order in which columns are displayed, by dragging and dropping them.

To remove a column, hover over a column header and click .

The position of **Select All**, **Children** (Requirements module), and **ID** is fixed, and these columns can't be removed.

Workspaces

Workspaces are customized views made up of one or more of the following elements:

- Settings used in **Define view**
- Filters
- Selected columns

Once you have set up your display as explained above, you can save your view as a workspace. The workspace can then be loaded in the future as needed. You can also modify a workspace, share it with all users of the project, or add it to your list of favorites for quick access. Shared workspaces that you created can be unshared, and workspaces that you no longer use can be deleted.

A workspace is unique to the module in which the view is created. For example, the Workspaces menu in the Requirements module will contain only views created for this module.

Some functionality may not be available to you depending on the permissions that your administrator has assigned to you.

Requirements module: By default, workspaces are loaded in **Manage** mode. To view a workspace created in **Author** mode, load the workspace and switch to **Author** mode.

See also

- "[FAQs](#)" on page 18
- "[Getting started with the Requirements module](#)" on page 24

Common actions

There are a number of things that you can do in the ALM Web Client that can be done in all modules. The following functionality is common to all ALM Web Client modules:

Common actions toolbar

When you select one or multiple items in a grid, the common actions toolbar is displayed at the bottom of the window. Use the toolbar to perform the following actions:

- View or edit details of the item
- Delete one or multiple items
- Add an item before or after a selected item (Requirements only)
- Copy, cut or paste items

Note:

- The buttons available on the toolbar differ depending on the module selected.
- Not all options are enabled when selecting multiple items.
- Some options may be disabled depending on the user permissions that your project administrator has defined for you.

Adding comments

Comments are useful for discussing issues regarding a specific entity and are important for collaboration with other ALM users. Comments are displayed in the **Comments** tab of an entity.

1. In the [Details view](#) of an entity, click the **Comments** tab. Click **Add comment** in the text editor toolbar. A new section is added to the comments field with your user name and the current date.
2. Type your comment. You can use the text editor to change the font type and size, or to format your text.
3. Click **Save** to update the entity.

Working with attachments

Use attachments to provide additional background information relevant to the item. For example, for a defect you could attach a screen recording of the scenario in which the bug occurred. You access, add, and manage attachments in the **Attachments** tab of the entity.

When editing or deleting attachments, you can select a single attachment or multiple attachments. A blue boundary indicates the selection.

Note: The **Attachments** tab is entity specific, and displays only files attached to the selected entity. Images inserted in memo fields of an item are also displayed as attachments.

Adding attachments

1. Do one of the following:
 - a. In the [Details view](#) of an entity, click the **Attachments** tab. Click **Add attachment** and select the file you want to upload.
 - b. Drag and drop the file from Windows Explorer onto any tab of the entity.

- c. Copy and paste images or screenshots from the clipboard directly to the **Attachments** tab (Chrome browser only).
2. When the attachment is uploaded, it is displayed as a tile including an icon for the application associated with the attachment, as well as file details such as name, size, and modification date. To rename the attachment, select the file name field and make your change.

Tip:

- Add a description so that other users know what the file contains and whether this is relevant to them.
- Click the thumbnail of an image attachment to preview the image.

3. Save your changes. You can update multiple attachments and then save all your changes at once by clicking **Save**.

Download an attachment by clicking .

Viewing the history of an item

You can see the change history of a selected item in the **History** tab displayed in the **Details view** of an entity. Hover on the purple dots to get the full date and time of each change. Some of the texts in the history records are truncated. Hover on the text to display a tooltip with the complete text.

What changes are recorded?

Changes to all fields that have been defined to include a history of changes. (Your administrator determines which fields should include history.)

What information can I see for each change?

- Who made the change
- The date and time of the change
- The old and new value of field

Tip: Use the filter to remove less recent changes from the view, or to display changes for a specific field only.

Locate Entity using GoTo Entity ID

When creating a new entity, ALM automatically assigns a unique ID number to that entity. You can navigate directly to an item by specifying the entity ID.

See also

- "[Displaying what you need](#)" on page 11
- "[Editing requirements](#)" on page 29
- "[Updating defects](#)" on page 42

FAQs

Here are some frequently-asked questions about using the ALM Web Client

Tip: Do you have some tips you'd like to add? Email us at sw-doc@hp.com.

I work on a number of projects in ALM and want to work on them in the ALM Web Client. Why can't I see all my projects when I try to select a project?

If your project is a version control project, it will not be available in ALM Web Client.

[Why can't I see the Requirements/Defects module?](#)

If you don't have permission to access a particular module, the module will not be listed.

[I loaded a workspace. How can I remove it?](#)

You can load a new workspace, or you can modify the settings of a loaded workspace by clearing the categories, the filters, or the column selections.

[How can I email an entity to another project user?](#)

Copy and paste the URL into an email. Other ALM Web Client users can use the link to access the entity.

[Why can't I add comments and attachments to entities?](#)

You may not have permission to modify entities.

See also

- ["Using the ALM Web Client" on page 7](#)
- ["Common actions" on page 14](#)

Chapter 3: Working with requirements by job function

ALM's Requirements module helps you to define, manage, and track requirements at all stages of the application lifecycle. Working with requirements in the ALM Web Client involves the following tasks:



Note: Depending on what permissions you have, you may not be able to perform all these tasks.

Working with requirements involves collaboration across different job functions and teams. Whether you are a business analyst or part of the development team, you can use ALM to plan, define, and collaborate on a set of requirements.

See the next page for use case scenarios explaining how the following job functions work with requirements:

- Business analyst
- Development - Team lead

BUSINESS ANALYST	Responsible for creating, updating and managing the business and functional requirements		
 <p>Alternative job titles Functional architect Project manager Project owner</p>	<p>Define</p> <p></p> <p>Define the requirements Create high level business requirements by selecting the Business requirement type, and giving your requirements a name. You can come back to fill in more details at a later stage.</p> <p>Tip: Have your administrator set up the Business requirement type so that there are only a few required fields such as Type and Name. That way you can quickly add requirements.</p> <p></p> <p>Break down the requirements Break the parent Business requirements down by adding child Functional requirements underneath them.</p> <p>Tip: Have your administrator define a default child requirement type for your Business requirements.</p> <p></p> <p>Prioritize Select a value from a drop-down list of the Priority field.</p> <p>Tip: Have your administrator set up the Priority field with a drop-down list of values that support your business processes.</p> <p></p> <p>Assign status Use a status field to track your requirements*. The initial status of a new requirement is usually Draft.</p> <p>Tip: Have your administrator set up a Status field with a drop down list of values that support your business processes.</p> <p></p> <p>Assign to release and cycle Select a value from the drop-down list in the Target Release and Target Cycles fields of the requirement.</p> <p></p> <p>Send for review Collaborate with other stakeholders by sending the requirements for review. You can define a category view by Release and Priority, and save it as a shared workspace. Other project users can then load the workspace and review your requirements.</p>	<p>Edit</p> <p></p> <p>Detail requirements</p> <ul style="list-style-type: none"> ▪ Using Author mode, add more information to the description of your requirements. Provide additional details by inserting a diagram or image into the description field. ▪ Complete the fields that you left out when you first created the requirements. <p></p> <p>Comment Add comments to questions or other comments that stakeholders added during their review, and if needed, update the requirement accordingly.</p> <p></p> <p>Add supporting resources Often you will have supporting documents, created in other applications, that belong with a requirement. Attach these documents to your requirements to add valuable background information.</p> <p></p> <p>Manage relationships between requirements Add traceability links between a selected requirement and other requirements using requirement ID numbers. Some requirements may need to be changed in the future, so traceability will allow you to easily identify other requirements affected by the change.</p> <p></p> <p>Move requirements Requirements and development plans can change, and you may need to reorganize your requirements to match the breakdown and structure of your planned delivery. You can move requirements around, or change their order using either Author or Manage mode.</p> <p></p> <p>Update status</p> <p>* Using a status field to track your requirements is an ongoing process. As your requirements move from stage to stage in their lifecycle, update their status by selecting the appropriate values from the drop-down list. Some typical values for the status field are: Draft, Reviewed, Scoped, In Progress, Implemented, In Testing, Tested, Delivered, Cancel, Descoped.</p>	<p>Monitor</p> <p></p> <p>Track your requirements Define views and filters for monitoring your requirements so that you can identify those items that need your attention. You can then save the views as workspaces for use in the future. For example, you can define a category view of all requirements for the upcoming release, with a Priority of Urgent, and then add a filter to display only those requirements with a Status of Open. Based on this you may decide that additional resources are required, or you may de-scope some items from the release. You can click on the ID link of a particular requirement to view its full details.</p> <p></p> <p>Monitor traceability Check if there is test coverage for a specified requirement, and see the status of the tests. Once development starts, monitor the quality of your application by keeping track of the number and severity of defects related to a particular requirement. When changes to requirements are needed, identify inter-dependencies between requirements so that you can see the full impact of a proposed change.</p>



Indicates a tip

This is an example only. As ALM is highly customizable, your organization may use different work processes and requirement fields from those presented in this scenario.

 **DEVELOPMENT TEAM LEAD** Responsible for ensuring that the application is developed on time and according to the requirements

Define	Edit	Monitor
 Breakdown requirements Break the Functional requirements created by the business analyst down into child requirements, to create smaller more manageable deliverables for the development team. If your organization has several development teams, it can also be useful for tracking purposes to use a field for the team responsible for the requirement. For each child requirement, include a description of the functionality that needs to be developed.  Define a category view by Target Release and team responsible for the requirement. When you add requirements under the category folder for your team, the new requirements are automatically assigned to your team, and the Target Release field is assigned the same value as the Target Release category folder.	 Add details to requirements Complete fields that you left out when you first created the requirements.	 Track your requirements ▪ Check for requirements without an owner. Add a filter to display your team's requirements with an empty owner field. ▪ Define views and filters for monitoring how your team is doing. For example, you can define a category view by owner and status, and then add filters to display requirements for the upcoming release cycle, for which your team is responsible. You can click on the ID link of a particular requirement to view its full details*.  Save your views as workspaces, so that you can use them again in the future without having to redefine them.
 Prioritize Set your team's priorities for the child requirements. Select a value from a drop-down list of the Priority field.  Have your administrator set up the Priority field with a drop-down list of values that support your business processes.	 Keep your statistics up to date Fields such as number of remaining days required to complete the requirement, and number of invested days will let you see if your team is on track. As development progresses, have team members update these fields for the requirements assigned to them.	 Gain insight into what is blocking completion of a requirement *In the traceability tab of the requirement you can see the status of test coverage and defects related to a particular requirement.
 Assign to cycle Select a value from the drop-down list in the Target Cycles field of the requirement.	 Attach additional information Attach any relevant information associated with the requirement such as notes from meetings or email threads.	 Update status Update the status field to continually track progress on your requirements. For example, as a developer starts to work on a requirement, have them change the status to <i>In Progress</i> . When the functionality defined by the requirement has been developed, the developer should change the status to <i>Implemented</i> . That way you can track the progress of your team, and QA knows what functionality is ready for testing.
 Estimate development time A field for estimated development time (days) for each requirement can help you to plan the development effort, and distribute the workload. If the given development time for building the application exceeds the number of days until the release, you may need to remove some lower priority items.		
 Distribute the workload Use an owner field to assign each requirement to a developer. Select the owner from a drop-down list of users.		
 Assign status Track your requirements using a status field. Some typical values for the status field are: <i>Draft, Reviewed, Scoped, In Progress, Implemented, In Testing, Tested, Delivered, Cancel, Descoped</i> . The initial status of a new requirement is usually <i>Draft</i> .  Have your administrator set up a status field with a drop down list of values that support your business processes.		



Indicates a tip

This is an example only. As ALM is highly customizable, your organization may use different work processes and requirement fields from those presented in this scenario.

See also

- "Requirements overview" on the next page
- "Using the ALM Web Client" on page 7

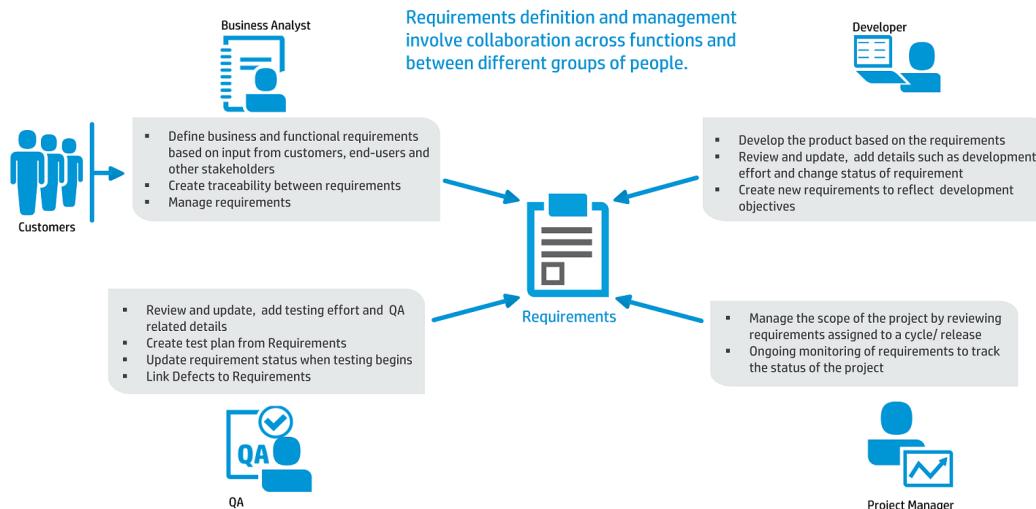
Requirements overview

Requirements describe in detail what needs to be solved or achieved to meet the objectives of your application. Requirements create a clear picture of the deliverables, and are critical to a project's success. Poorly defined requirements can lead to IT projects that are over budget, lack functionality, and are not delivered on time.

One of the keys to developing applications that meet business needs and user expectations is to define the requirements up front. Clearly and correctly defining requirements at the start of a project has the following advantages:

- Creates a common vision of what needs to be delivered
- Sets clear expectations and priorities
- Cuts waste

Defining and managing requirements involves collaboration between many people, across different job functions. Whether you are a business analyst, project manager, or part of the development or QA team, you can use ALM to plan, define, communicate, and collaborate on a set of requirements.



Note: Some of the functionality in the diagram above requires working with the ALM Desktop Client. For more information on suitable candidates for using the ALM Web Client, see "[The ALM Web Client Overview](#)" on page 5.

How to get started with defining requirements

Start by gathering information such as functional and technical specifications, marketing and business requirements documents, and stakeholders goals.

Here are some of the questions that you can ask:

- What is the main purpose of the application?
- What challenges do you have today with your current processes that you are trying to solve?
- What are the major features of the application?
- What are the critical constraints of the application?
- What is the relative importance of each element in the application functionality?
- What are the critical or high-risk functions of the application?
- What are your business or testing priorities?
- Do your customers/end-users agree with your priorities?

You are now ready to begin defining and detailing your requirements. When defining requirements in ALM, you can choose from a selection of ready-made default requirement types, or your administrator can create custom requirement types suited to your organization to capture all levels of requirements. The table below shows some of the default requirement types:

Requirement Type	Use
Business	Specifies the high level objectives that describe what the application as a whole must deliver to the business and its end-users
Functional	Details what the application must do in order to achieve the business requirements
Group	Represents a collection of related requirements
Testing	Specifies the testing areas and use cases that need to be covered

As part of defining a requirement, you can attach supporting documents to provide background information. Requirements can also be updated when necessary as development of the application progresses.

Managing requirements

Once the project requirements have been detailed and approved, you can manage and monitor them. Defining links between requirements and other entities will allow you to monitor inter-

dependencies. You can use traceability to view links between requirements and other entities, to create links between requirements and other requirements, or between requirements and defects. Keep track of your requirements and assess the readiness of the application with filters, dashboards, and reports.

Note: Comprehensive requirements management capabilities are currently available only in the ALM Desktop Client. For more information, see the HP Application Lifecycle Management User Guide.

See also

- "Working with requirements by job function" on page 19

Getting started with the Requirements module

When you select the Requirements module from the masthead, the Requirements window opens.

The screenshot shows the HP ALM Requirements module. At the top, there's a header with the HP logo, 'ALM | Requirements', and a dropdown menu. Below the header are buttons for 'Manage' and 'Author'. To the right of the header are project details ('Project: DEMO/Demo'), user info ('sa'), and a 'Logout' button. A 'Breadcrumbs' section shows the path: 'Priority: 5-Urgent > Mercury Tours Application >'. On the left, a 'Navigation pane' displays a tree structure for 'Priority' levels (1-Low to 5-Urgent) and the 'Mercury Tours Application' category, which further branches into 'Online Travel Booking Services', 'Reservation Management' (with a 'Create Order' node), 'Booking System', 'Application Security', 'Application Usability', and 'Application Performance'. The main viewing pane is a table listing requirements with columns: Req ID, Name, Description, Priority, Target Release, and Author. The table contains six rows of data. A 'Define view panel' is visible on the right side of the screen.

Defining the view

If your project has requirements and is not a new project or an existing project without requirements, you can define a view with category folders. When you add category fields, you create virtual category folders for displaying your requirements based on the fields that you define. You can select up to four hierarchy levels.

Category views enable you to quickly manipulate your project data and to create dynamic views. These views arrange large amounts of project data in a way that allows you to analyze and manage the information more effectively. You can also drill down within a view to see more detailed

information of a particular item. For more details on defining the view, see "Displaying what you need" on page 11.

Using the navigation tree

The navigation pane displays the hierarchy of requirements in a tree structure.

- Requirements are created at multiple levels either above, below, or at the same level as other requirements. This results in a physical hierarchical structure. When no categories are defined, the tree displays the requirements according to their actual physical hierarchy.
- Category views use field values of requirements to create virtual category folders. These folders are superimposed on the actual requirements tree, and so the tree includes both category folders and requirements. Categories are displayed in blue with a category icon . When the item in the tree is a requirement, the icon next to the item indicates the requirement type. As the requirements themselves are not physically located in these virtual folders, they do not need to match the categories. Often a parent requirement will not match a particular category but will have a child or grandchild requirement that does. In order to preserve the physical hierarchical structure, the parent requirement must appear even though it is not part of that category. A requirement that doesn't match the category folder under which it appears is displayed in light gray with an out of scope icon .

Note: Requirement entries are shown under the lowest defined category.

The screenshot shows the HP ALM Requirements interface. At the top, there's a header with the HP logo, the title 'ALM | Requirements', and a dropdown for 'Project: DEMO/Demo'. On the right, there are links for 'Workspaces' and a star icon. Below the header is a toolbar with buttons for '+ Add Filter', '+ Add Requirement', 'Choose Columns', 'Go to Requirement', 'Refresh', and a 'Children' button. The main area has two sections: a navigation tree on the left and a table on the right.

Navigation Tree: The tree starts with a 'Category folder' node, which branches into several priority levels: 'Priority: <no value>', 'Priority: 1-Low', 'Priority: 2-Medium', 'Priority: 3-High', 'Priority: 4-Very High', and 'Priority: 5-Urgent'. Under 'Priority: 5-Urgent', there's a node for 'Mercury Tours Application', which further branches into 'Online Travel Booking Services', 'Reservation Management', 'Booking System', 'Application Security', 'Application Usability', and 'Application Performance'. An 'Out-of-scope requirement' node is also visible, connected to the 'Reservation Management' node.

Table: To the right of the tree is a table with columns: Req ID, Name, Description, Priority, and Target Release. The table contains the following data:

Req ID	Name	Description	Priority	Target Release
134	Online Travel Booking Services	The Mercury To...	5-Urgent	
173	Reservation Management	- The customer ...	3-High	
176	Booking System	Each of the onli...	5-Urgent	Release 10.5
185	Application Security	Defines the sec...	5-Urgent	Release 10.5
212	Application Usability	Defines the usa...	5-Urgent	Release 10.5
247	Application Performance	The performanc...	5-Urgent	Release 10.5

You can resize the width of the navigation pane. You can also collapse the pane by clicking in the top right corner, which will enlarge the viewing area so to that more data can be displayed.

When you define the view to display requirements with no hierarchy, and no category fields are defined, there is no navigation pane.

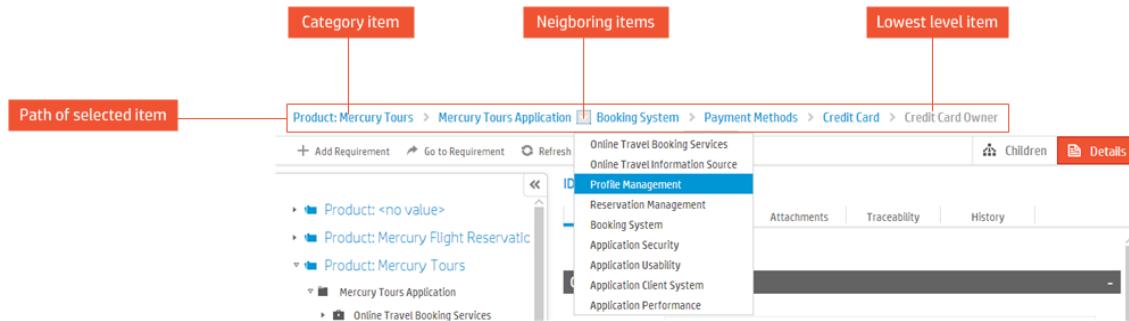
You can also navigate the tree using the following keys:

- **Up arrow.** Moves up.
- **Down arrow.** Moves down.
- **Right arrow.** Expands the item
- **Left Arrow.** Collapses the item.
- **Enter or Space.** Selects the item.

Breadcrumbs navigation bar

The breadcrumbs navigation bar is displayed on top of the tree pane and the view area. The bar represents the path in the tree hierarchy including both category items and requirement items. When you select an item in the tree, the corresponding path is shown in the breadcrumbs navigation bar.

You can navigate quickly through the hierarchy by selecting any breadcrumb link from the navigation bar. You can also select a neighboring item by clicking the breadcrumb separator icon ➤ and selecting an item from the drop-down list. Lowest level items that have no items under them are displayed in gray.



The breadcrumbs navigation bar is also displayed when the tree pane is collapsed.

Changing the display in the main viewing area

The way in which information is displayed in the main viewing area is determined by the following:

- **The mode selected.** **Manage** mode displays the information in a data-centric view. You can choose how information is displayed in the main viewing area by switching between the **Details** and **Children** view. **Author** mode displays requirements in a document view.

- **The item selected in the navigation tree.** When the navigation pane is displayed, selecting an item from the tree displays information corresponding to that item in the main viewing area.

For more details on changing the display, see "[Displaying what you need](#)" on page 11.

See also

- "[Displaying what you need](#)" on page 11
- "[Working with requirements by job function](#)" on page 19
- "[FAQs for requirements](#)" on page 35

Defining requirements



Begin by adding new requirements and defining them.

Tip:

- You can create a basic framework of high level requirements, and then add child requirements to further break them down. Splitting a higher level requirement into smaller child requirements can be helpful in providing team members with a better understanding of what specifically needs to be achieved, and can give a more accurate picture of progress on the requirement.
- Developers may find it useful to break a feature down into smaller deliverables by creating child requirements.

To add a new requirement, you must have permission from your administrator to do so. If you have defined your view to display requirements with no hierarchical structure, the **Add Requirement** button is not displayed. To display the button, select **Define view**, switch to **Display requirements with a hierarchy** and click **Apply**.

1. In the [masthead](#), select the Requirements module.
2. Decide where to add the requirement. The breakdown and structure of the requirements should match your planned delivery.

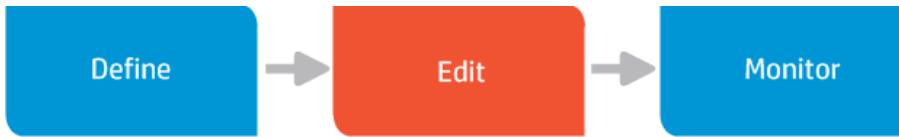
Tip: If you have defined a category view for your requirements, adding a new requirement under a specific category folder will automatically populate the new requirement with the corresponding category field values. For example: If you define your category view to display requirements by Product and then by Priority, when you add a new requirement under the Product *Mercury Tours*, Priority *5-Urgent* categories, the product and priority fields of the new requirements are automatically completed with the category values.

3. Add the requirement by using one of the following options (all options open the **Add Requirement** dialog box):
 - Select an item in the requirements tree and click **Add Requirement** to add a child requirement to the selected item. If you select a category folder in the tree, you must select the lowest-level category folder in order to add requirements.
 - Select a requirement in the **Children** view grid (Manage mode only), and click **Add Before** or **Add After** to add a new requirement either before or after the selected requirement.
4. Select the requirement type that best describes the requirement you are creating such as business, feature, functional, non-testable requirement, etc.
5. Give the requirement a name and complete any other required fields, indicated by a red square to the left of the field name. Fields that have been grayed out are read-only fields.
6. When you add a requirement you can choose to detail the requirement by completing the non-required fields. This information can also be added at a later stage when [editing](#) the requirement.
7. Click **Add**, or click **Add & Another** to save the requirement and to immediately add another one.

See also

- "[Working with requirements by job function](#)" on page 19
- "[Common actions](#)" on page 14
- "[Displaying what you need](#)" on page 11
- "[FAQs for requirements](#)" on page 35

Editing requirements



Requirements usually go through an iterative process where the details are refined and clarified, and the requirement needs to be edited. As work on the requirement progresses, some of the fields may also need to be updated in order to allow proper tracking of the requirement. For example, some organizations use a status field to track the progress of a requirement. Users update the value from *Draft* to *Reviewed* to *Scoped* etc. as work on the requirement progresses.

You can update the details for each requirement, or add attachments and comments. As requirements change, you can also rearrange them and move them around. To edit or delete a requirement you must be given these permissions by your administrator. Fields that are grayed out cannot be edited.

While multiple users can view a requirement simultaneously, only one user at a time can update a requirement. If another user edits a requirement that you are already viewing, and you then start to make changes, you may receive a message from the server that your changes have been overridden by the newer values.

ALM Web Client's Requirements module supports a dual approach to working with requirements, and you can choose the mode that best suits the way you like to work. If you prefer working with requirements in a document view, you can work in Author mode. Use Manage mode if you prefer a data-centric approach.

Using Manage mode

Updating a requirement

1. In the Requirements module, make sure **Manage** mode is selected, and locate the requirement that you want to update.
2. Modify the details in the appropriate fields or tabs of the requirement.

Details view: You can modify the fields directly in the view.

Children view: Click the ID link of the requirement, or select the check box of a requirement and click **Details** on the bottom toolbar. The **Requirement Details** dialog box opens for editing.

While on the modified record, you can undo the changes by clicking **Restore**. Modified fields in the current record will revert to their previous values.

3. Click **Save**.

Category views: When you edit a requirement and change the value of the field on which a category folder is based, requirements are not automatically moved to the corresponding category folder. The move is seen on refresh only.

Drag and drop

Drag and drop functionality is only available when requirements are displayed with a hierarchy.

- **Requirements tree.** Select the requirement that you want to move. Gray squares are displayed . Click the squares to drag and drop the requirement in the new location.

Note: Requirements currently cannot be moved between categories.

- **Children view.** To re-order child requirements under the same parent, hover over the start of a row in the grid (to the left of the check box). Gray squares are displayed . Click the squares to drag and drop the requirement to a new place in the grid.

Cut, copy, and paste

This functionality is only available when requirements are displayed with a hierarchy, and can only be performed in Children view. You can't cut and paste, or copy and paste between categories.

Delete

Deleting of requirements can be done only in Children view. A deleted requirement is immediately removed from all the categories in which it is shown.

Note: When you delete a requirement, you also delete its child requirements. Traceability links to the requirement or to child requirements are also deleted.

Using Author mode

Requirements are displayed in Author mode only if the type of the selected requirement, or the type of one of its parents, is configured to display in this mode.

Note: Author mode is disabled when requirements are displayed with no hierarchy. To enable Author mode, select **Define view**, switch to **Display requirements with a hierarchy** and click **Apply**.

Updating a requirement

1. Open the Requirements module and locate the requirement that you want to update.
2. Select **Author** mode. A document view is displayed in the main viewing area.

Tip: You can navigate the document using the tree, the breadcrumbs, **Go to Requirement**, or the scrollbar.

3. Change the name or the description directly in the document.

Although Author mode displays the content as one document, each name and description field is managed in a separate edit box. You can use the editor toolbar for rich text editing of the description field only. You can also insert images into the description field.

4. To view or update other fields or tabs of the requirement, click the section number (next to the Name edit box) to open the **Details** dialog box of the specific requirement.

While you are in the process of editing a requirement, click **Restore** in the editor toolbar to undo your changes. You can also click **Save** at any time to save recent changes. When you leave the requirement, your changes are saved automatically without having to click **Save**.

Reordering requirements

In the requirements tree, select a requirement, and drag and drop it into the new location. The document will be updated accordingly. Requirements currently cannot be moved between categories.

Deleting requirements

To delete requirements, switch to **Manage** mode, and use **Children** view to select the requirements to delete.

Note: When you delete a requirement, you also delete its child requirements. Traceability links to the requirement or to child requirements are also deleted.

See also

- "[More about Author mode](#)" on the next page
- "[Working with requirements by job function](#)" on page 19

- "Requirements overview" on page 22
- "Displaying what you need" on page 11
- "Common actions" on page 14

More about Author mode

A selected requirement is displayed in Author mode only if its type, or a parent requirement's type has been defined to display in this mode. This is done by your administrator in ALM Web Client Customization, by defining the requirement type as a document root.

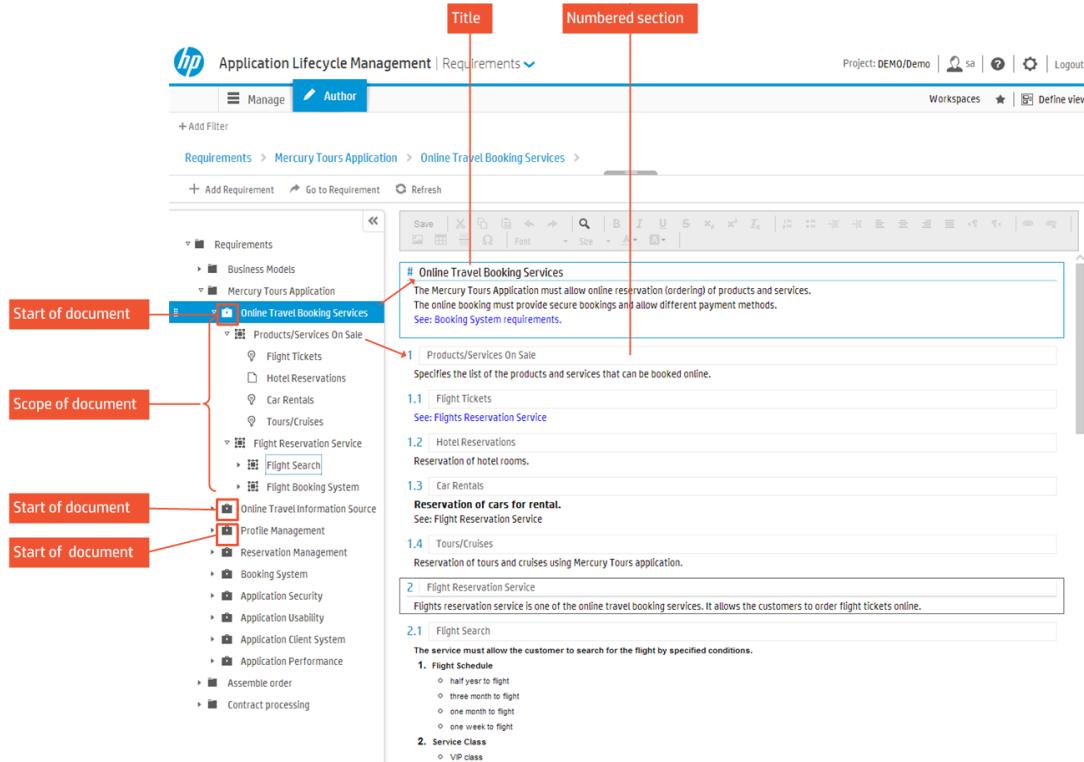
It is not always necessary to view all the requirements of an ALM project as a single document, and often it may be better to view certain types of requirements as several separate documents. In order to allow flexibility in determining the scope of document, the document root is used to determine the start of a new document view.

In Author mode, the document view spans from the highest level document root until the last of its children, irrespective of whether the child requirement types have been defined to display in this mode. The top level document root is displayed as the title, and all its children as numbered sections. When the type of a child requirement of a document root is itself a document root, this will not mark the start of a new document.

When no requirement types have been defined to display in Author mode, a message is displayed in the view area. A temporary view is available by clicking **Try**, but the document scope is lost when refreshing or moving to a sibling or parent requirement.

Example: Your site administrator has defined the **Business** requirement type  and the **Functional** type  to display as documents. In the scenario below, the top-level Business requirement *Online Travel Booking Services* marks the start of a document, and this requirement becomes the title. All child requirements are displayed as numbered sections in the same document. Although the Functional requirement type used for the *Flight Tickets*, *Car Rentals* and *Tour/Cruises* requirements has been defined to display as a document, these requirements don't each become the start of individual documents because *Online Travel Booking Services* is at a higher level in the requirement tree. Requirement types that are not defined to display as a document, such as the Undefined type used for *Hotel Reservations*, also become numbered sections in the document by virtue of the fact that they are child requirements of a Business requirement. The document ends with the bottom-most child requirement under *Flight Booking System*.

The Business requirements *Online Travel Booking Services*, *Online Travel Information Source* and *Profile Management* are sibling requirements at the same level in the tree, and so each of these marks the start of a separate document.



See also

- "Editing requirements" on page 29
- "Working with requirements by job function" on page 19
- "FAQs for requirements" on page 35

Monitoring and managing requirements



Monitoring requirements lets you keep track of the progress and quality of the application, and gives you an indication of how well the project is doing in terms of meeting its overall objectives. Using traceability, you can define links between requirements and other items so that you can monitor inter-dependencies. You can also use workspaces, views and filters to focus on the information that is relevant to you, making it easier to identify problem areas and to assess the readiness of the application.

Traceability

Traceability establishes a link between one or more items, and offers the following benefits:

- You can analyze the impact that a proposed change to a specific requirement will have on other requirements and entities affected by the change. This provides broader visibility so that you make informed decisions about whether or not to make the change.
- You can see if there is test coverage to verify if a specified requirement is being met, and identify gaps in coverage.
- You can monitor the quality of your application by keeping track of the number and severity of defects related to a particular requirement.

Add traceability

1. In the Requirements module, open a selected requirement and click the **Traceability** tab. Existing traceability links for the requirement are displayed.

Tip: Click the ID of any linked requirement or defect to view its details.

2. Click **Add traceability**, and select a traceability link:
 - **Trace to requirement.** Link to a requirement that depends on the selected requirement.
 - **Trace from requirement.** Link to a requirement that the selected requirement depends on.
 - **Link to defect.** Link to a defect related to the selected requirement.
3. Enter the ID of the requirement or defect to link.

Remove traceability

Click  in the right-hand corner of the item to remove the link. You can remove traceability only for requirements and defects.

Using workspaces

Use workspaces based on defined views and filters to monitor and manage your requirements. For example, you could create a workspace for viewing requirements with a **Priority** value of *High*, *Very High* or *Urgent*, with a **Review** field status of *Not Reviewed*.

Note: Comprehensive requirements management capabilities are currently available only in

the ALM Desktop Client. For more information, see the HP Application Lifecycle Management User Guide.

See also

- "Displaying what you need" on page 11

FAQs for requirements

Here are some frequently-asked questions about working with requirements.

Tip: Do you have some tips you'd like to add? Email us at sw-doc@hp.com.

General

There are no requirements displayed in the main viewing area when I select a requirement in the tree. Where have my requirements gone?

If you are in Children view, the main viewing area will be empty if the requirement that you selected in the tree has no children.

I want to set the sort order for my requirements but the option is disabled. What do I do?

In order to add a sort field, you need to switch to flat view. In Define view, switch to **Display requirements with no hierarchy**.

I logged in to ALM and my requirements tree has gone. What has happened?

ALM saves the last view in which you worked during your previous session. When you log in to ALM again, this is the view displayed. In your last session you may have used a workspace, or applied a view to display your requirements without a hierarchy. Check if a workspace is loaded (the name of the workspace will appear next to Workspace menu). Load a different one or modify the existing workspace if needed. To bring the requirements tree back, click **Define view** and switch to **Display requirements with a hierarchy**. Click **Apply**.

I want to add a requirement but there is no Add Requirement button. How do I add a requirement?

The Add requirement button is not displayed when:

- The selected item in the tree has additional category levels under it. When you select a category folder in the tree, you must select the lowest level category folder in order to add requirements.
- Your view has been defined to display requirements with no hierarchical structure. To add requirements, click **Define view** and switch to **Display requirements with a hierarchy**. Click **Apply**.
- You do not have permission to add requirements.

Author Mode

I am trying to view requirements in Author mode but the button is disabled?

Author mode is disabled in flat view. To enable the Author mode button, click **Define view** and switch to **Display requirements with a hierarchy**. Click **Apply**.

I am in Author mode and I have selected a requirement, but there is a message that the selected requirement cannot be displayed. How do I get Author mode to display my requirements?

A selected requirement is displayed in Author mode only if its type, or a parent requirement's type has been defined to display in this mode. This is done by your administrator in ALM Web Client Customization, by defining the requirement type as a document root. For more details, see [more about Author mode](#).

To get a general idea of what Author mode does, you can try it out by clicking **Try**. The document view is only temporary and is lost when you move to a parent or sibling requirement.

See also

- "Working with requirements by job function" on page 19
- "Getting started with the Requirements module" on page 24
- "Requirements overview" on page 22

Chapter 4: Working with defects by job function

ALM's Defects module helps you to define, manage, and track defects at all stages of the application lifecycle.



How developers work with defects



DEVELOPER

DEFECTS MODULE

In addition to developing the application, the developer is responsible for repairing defects, tracking progress by creating and updating defects, and communicating status to other stakeholders.

Define



Search for a similar defect

To avoid creating duplicate details, it is good practice to first search for similar defects that already exist.

- 💡 Use the View and Workspaces features to look for similar defects.



Define defect

While developing, you might come across defects that need to be repaired. Define a defect by giving your defect a summary and a severity. A detailed description is always helpful. You can come back to fill in more details.



Prioritize

Prioritize the work. Select a value from a drop-down list of the **Priority** field.

- 💡 Have your administrator set up the **Priority** field with a list of values that support your business processes.



Add attachments

Attach any supporting documents that belong with a defect. These attachments can be pictures, video clips—anything that will help illustrate the problem that needs to be fixed.



Assign a user

When you know who will be responsible for fixing the defect, assign the defect to that user—maybe even yourself!

Edit



Search for your defects

Search for the defects assigned to you so you know what you need to repair in the application.

- 💡 Use the View and Workspaces features to look for your defects. Narrow down your search to look for defects for a specific release and/or cycle.



Detail the defect

Complete the fields that you left out when you first created the defect. For example, assign a different user based on availability or skill set.



Assign to a release and cycle

When you are ready to schedule the defect for repair, assign it to a release and cycle. Select a value from the drop-down list in the **Target Release** and **Target Cycles** fields.



Update status

Use the **Status** field to track your defect. Select the appropriate status from the drop-down list. Typically, developers select **Open** when starting to repair a defect and **Fixed** when done.

- 💡 Have your administrator set up the **Status** field with a list of values that support your business processes.



Add comments

Add comments and questions for other stakeholders. As stakeholders review your work, they can add comments and questions for you too.

This is an example only, and in your organization you may use different processes. Also, as ALM is highly customizable, the scenario may use fields that are not available in your organization.

How exploratory testers work with defects



EXPLORATORY TESTER

DEFECTS MODULE

The exploratory tester invents test cases and finds defects in the application based on his/her knowledge of the application. As defects are found, the tester tracks progress by creating and updating defects, and communicating status to other stakeholders.

Define



Search for a similar defect

To avoid creating duplicate details, it is good practice to first search for similar defects that already exist.

- 💡 Use the View and Workspaces features to look for similar defects.



Define defect

While testing, you come across defects that need to be repaired. Define a defect by giving the defect a summary and a severity. A detailed description is always helpful. You can come back to fill in more details.



Prioritize

Prioritize the work. Select a value from a drop-down list of the **Priority** field.

- 💡 Have your administrator set up the **Priority** field with a list of values that support your business processes.



Add attachments

Attach any supporting documents that belong with a defect. These attachments can be pictures, video clips—anything that will help illustrate the problem that needs to be fixed.



Assign a tester

When you know who will be responsible for testing the repaired defect, assign the defect.

Edit



Search for your defects

Search for the defects detected by you.

- 💡 Use the View and Workspaces features to look for the defects you need to test. Narrow down your search to look for defects for a specific release and/or cycle.



Detail the defect

Complete the fields that you left out when you first created the defect.

Monitor



Track defects

Define views and filters for monitoring defects so that you can identify those items that need your attention. You can then save the views as workspaces for use in the future. For example, you might want to define a category view for the upcoming **Release**, with a **Priority** of *Urgent*, and then add a filter to display all defects with a **Status** of *Fixed*. You now have a list of the defects ready for testing.



Monitor traceability

- Check that there is test coverage for a specified defect.
- When changes to defects are needed, use traceability to identify inter-dependencies between requirements and defects.
- Monitor the quality of your application by keeping track of the number and severity of defects related to a particular requirement.



Update status

Use the **Status** field to track defects and verify fixed defects. Select the appropriate status from the drop-down list. Typically, testers select *Closed* and *Reopen*.

- 💡 Have your administrator set up the **Status** field with a list of values that support your business processes.



Add comments

Add comments and questions for other stakeholders. As stakeholders review your work, they can add comments and questions for you too.

See also

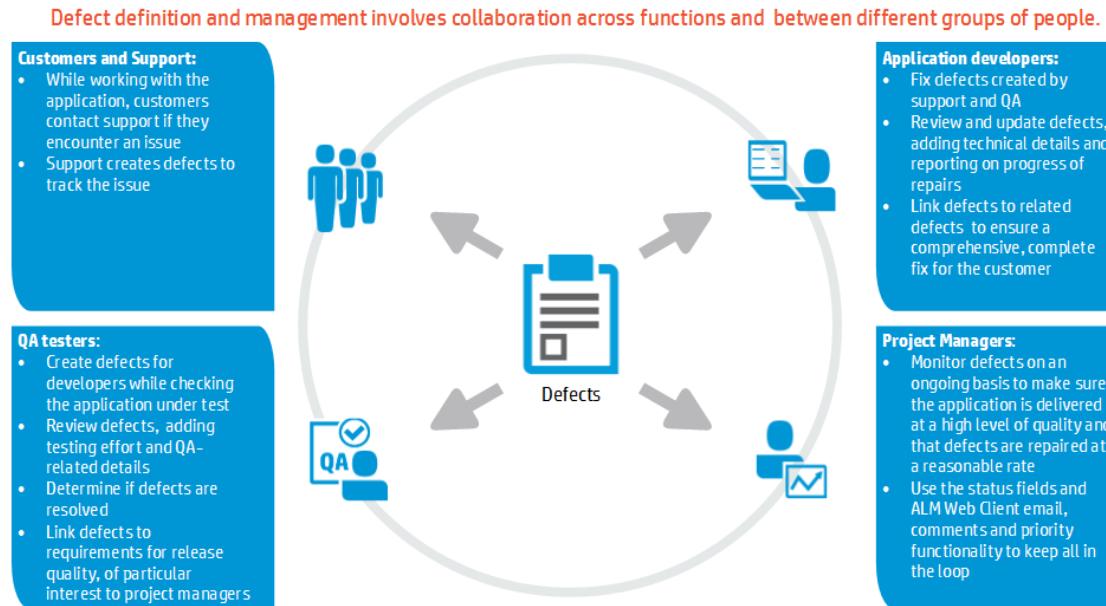
-  **Administrators:** "Customizing the ALM Web Client" on page 45

Defect overview

Ensuring the quality of your application is of utmost importance. Using the ALM Web Client you can report flaws in your application and track their repair. This can be done during all stages of the application management process. These flaws are reported as defects.

How ALM Web Client users collaborate

ALM Web Client users update and monitor defect statuses on an ongoing basis, providing full transparency to the state of application quality at any time.



How do I start working with defects?

- What information does each ALM Web Client user, based on his/her job function, need to access?

The ALM Web Client administrator can create custom forms for each job function. See ["Designing and managing forms" on page 47](#).

- Are there field values that some users should see, but not be able to modify?

Are certain fields mandatory under certain circumstances?

Are different field look-up lists needed at different times?

The ALM Web Client administrator can control how fields are displayed and modified using business rules. See ["Defining business rules" on page 53](#).

See also

- ["Working with defects by job function" on page 37](#)
- [!\[\]\(f6edc556ac4f638bd190faffd75655f2_img.jpg\) Administrators: "Customizing the ALM Web Client" on page 45](#)

Defining defects



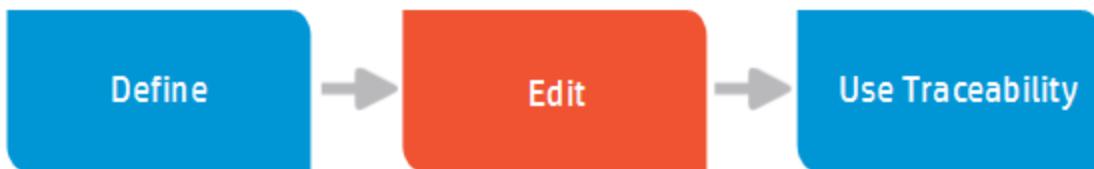
You define defects to ensure the quality of your application.

1. Select the Defects module.
2. Verify that a similar defect has not already been created by setting up views and filters. For details, see ["Displaying what you need" on page 11](#) and ["Filtering" on page 12](#).
3. Click **Add Defect**. Fill in the various fields, and save.
4. After saving, click the defect ID to edit the defect and:
 - **Add attachments.** Screen captures and recorded sessions demonstrate problems much more effectively than words can. Click the **Attachments** tab to work with attachments. For details, see ["Working with attachments" on page 15](#).
 - **Insert comments.** Comments are very useful for communication between various users. Each comment gets a timestamp and an indication of who added the comment. Click the **Comments** tab and **Add Comment**. For details, see ["Adding comments" on page 15](#).
 - **View history** Do you need background information? Viewing the history of a defect can give you perspective over why a defect was opened, how many people have worked on the defect, and how a defect eventually became assigned to you. Click the **History** tab to view the history. For details, see ["Viewing the history of an item" on page 16](#).
 - **Create traceability.** Is the determination of whether a requirement is met contingent on the defect you are adding? If so, creating a relationship between the relevant requirements and this defect. This lets you see how well your project is meeting its requirements. Click **Traceability** and create the relationship by typing in the requirement's ID. For details on traceability, see ["Traceability" on page 34](#).

See also

- "[Working with defects by job function](#)" on page 37
- "[Defect overview](#)" on page 40
- "[Updating defects](#)" below
- "[Using traceability](#)" on the next page

Updating defects



ALM Web Client users update defects differently depending on their different work functions.

1. Select the Defects module.
2. Look for the relevant defect, such as one assigned to you, by setting up views and filters. For details, see "[Displaying what you need](#)" on page 11 and "[Filtering](#)" on page 12.

Open the defect by clicking its ID number.

Tip: You can also open a defect by "going" to it. For details, see "[Locate Entity using GoTo Entity ID](#)" on page 17.

3. Click the **Overview** tab.
4. While filling in the various fields, make sure to:
 - **Change statuses.** Did you start working on a defect? Did you fix a defect? The available default statuses are: **New**, **Open**, **Fixed**, **Closed**, and **Cancelled**.
 - **Add attachments.** Screen captures and recorded sessions demonstrate problems much more effectively than words can. Alternatively, you can attach screen captures that demonstrate that the defect was fixed. Click the **Attachments** tab to work with attachments. For details, see "[Working with attachments](#)" on page 15.
 - **Insert comments.** Comments are very useful for communication between various users. Each comment gets a timestamp and an indication of who added the comment. Click the **Comments** tab and **Add Comment**. For details, see "[Adding comments](#)" on page 15.
 - **View history** Do you need background information? Viewing the history of a defect can give you perspective over why a defect was opened, how many people have worked on the

defect, and how a defect eventually became assigned to you. Click the **History** tab to view the history. For details, see "[Viewing the history of an item](#)" on page 16.

- **Create traceability.** Is the determination of whether a requirement is met contingent on the defect you are adding? If so, creating a relationship between the relevant requirements and this defect. This lets you see how well your project is meeting its requirements. Click **Traceability** and create the relationship by typing in the requirement's ID. For details on traceability, see "[Traceability](#)" on page 34.

5. Click the **Back to Grid** when done.

See also

- "[Working with defects by job function](#)" on page 37
- "[Defect overview](#)" on page 40
- "[Defining defects](#)" on page 41
- "[Using traceability](#)" below

Using traceability



ALM Web Client users can define relationships between a defect and other entities by adding traceability links.

You can add traceability links between a defect and:

- Other defects
- Requirements

Add traceability

1. Select the Defects module.
2. Look for relevant defect, such as one assigned to you, by setting up views and filters. For details, see "[Displaying what you need](#)" on page 11 and "[Filtering](#)" on page 12.

You can also open a defect by ID. For details, see "[Locate Entity using GoTo Entity ID](#)" on page 17.

3. Open the defect.
4. Click the **Traceability** tab. Existing traceability links for the defects are displayed.

Tip: Click the ID of any of the existing linked entities to view its details.

5. Click **Add link**, and choose either **Add Link to Requirement** or **Add Link to Defect**.
6. Enter the ID of the requirement or defect to link.

Remove traceability

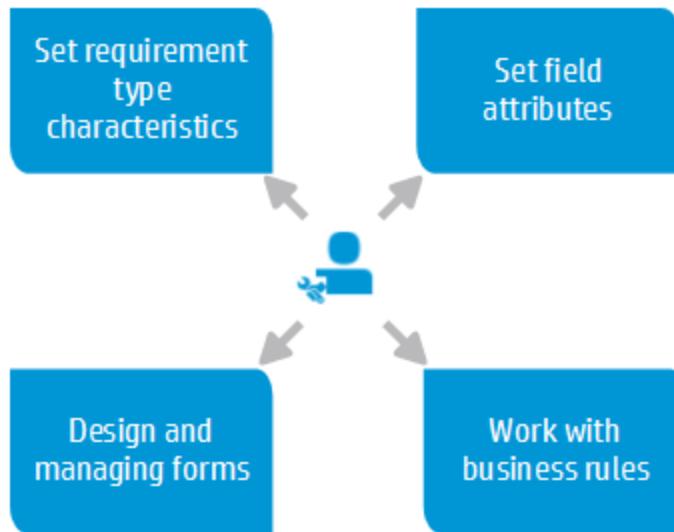
Click the  for the defect or requirement to unlink.

See also

- "[Traceability](#)" on page 34 (for requirements)
- "[Working with defects by job function](#)" on page 37
- "[Defect overview](#)" on page 40
- "[Defining defects](#)" on page 41
- "[Updating defects](#)" on page 42

Chapter 5: Customizing the ALM Web Client

 **Administrators:** As the ALM Web Client administrator, you can customize the end user's ALM Web Client experience.



See also

- "Managing projects" on page 61

Setting requirement type characteristics

As the ALM Web Client administrator, you can customize requirement types on a project-by-project basis to meet the needs of your users.

1. Select  and then **Customization** at the upper right to enter customization.
2. Select the module to customize. In this case, **Requirements**.
3. Select **Types**.
4. Select the requirement type you want to change, and then:
 - To change a requirement type's icon, select a new icon from the **Type Icon** drop-down list.
 - To set the default type for the requirement type's children, select a requirement type from the **Default Child Subtype** drop-down list.

Example

If you set **Functional** as the default child subtype for the **Group** requirement type, when you create a requirement under a **Group** requirement, the child requirement will be of type **Functional** automatically.

- To set a requirement type as a document root when working in Author mode, set **Document Root** to **Y**. For details on working in author mode, see "[Editing requirements](#)" on page 29.

You can set more than one requirement type as a document root.

Tip: If a child or a grandchild of a document root is also a document root, Author mode creates documents starting with the highest level document root.

- Click **Save**.

See also

- ["Customizing the ALM Web Client"](#) on the previous page

Setting field attributes

As the ALM Web Client administrator, you can customize how fields are displayed and used in the ALM Web Client. For example, you can make certain fields visible in the ALM Web Client and modify a description displayed when the user makes the mouse hover over the field.

Set field attributes

You can change field attributes for requirements and defects.

- Select  and then **Customization** at the upper right to enter customization.
- Select the module to customize.
- Select **Fields**.

Default values are retrieved from the ALM server.

- Select the field to customize.

Note: Some fields are read-only.

5. Edit the attributes for the field.
6. Click **Save**.

Restore field attributes

1. Select  and then **Customization** at the upper right to enter customization.
2. Select the module to customize.
3. Select **Fields**.
4. Click **Restore** to discard changes made since the last save.

See also

- ["Customizing the ALM Web Client" on page 45](#)

Designing and managing forms

As the ALM Web Client administrator, you can design forms for use in each project. Forms enable end users to view and edit relevant information for entities using a Details layout that is meaningful to their organization.

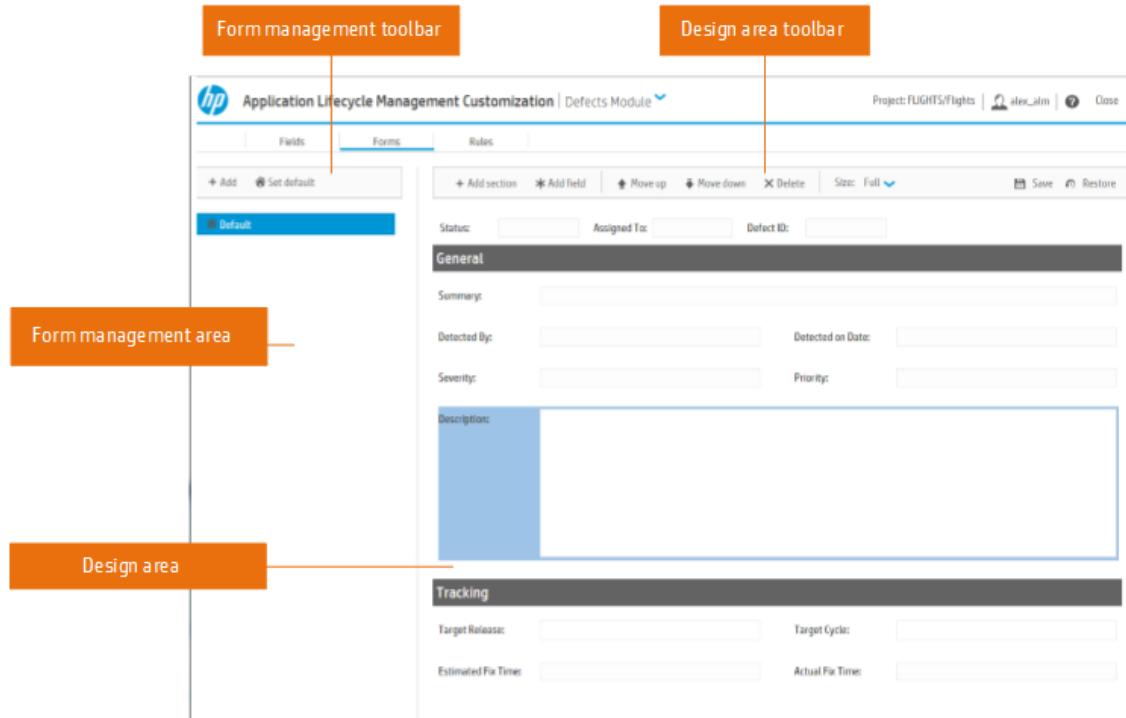
Administrators can design and manage forms for the Requirements module and the Defects module.

Forms are defined per module within a project. For example, you can define forms for the Requirements module and different forms for the Defects module in the same project. Which form is used is controlled by the business rules you create. For details, see ["Defining business rules" on page 53](#).

This section contains the following:

- ["What are the parts of the form designer?" on the next page](#)
- ["Designing forms" on the next page](#)
- ["Deleting forms" on page 49](#)
- ["What are the parts of the form designer?" on the next page](#)

What are the parts of the form designer?



In the Form Designer, you can:

- View existing forms, add forms, delete forms, and set default forms in the Form management area.
- Add fields to the form, and group them into sections, in the Design area.
- Set display and editing properties for fields with the Design area toolbar.
- Reorder and/or remove fields in the form by selecting a field in the Design area and using the Design area toolbar.

Designing forms

1. Click and then **Customization** at the upper right to enter customization.
2. Select the module for the form.
3. Click **Forms**.
4. In the Form management area, either select an existing form or click **Add** to create a new one.

Tip: Make sure to specify a unique name for the form when creating a new one.

5. In the Design area, add fields and sections using the **Add field**, **Add header fields**, and **Add section** buttons.

When adding a field:

- You can search for it using the **Type to search** box.
- You can also associate a field with a section by choosing the section from a list or creating a new section.
- Fields are added after the currently selected field.
- When finished adding fields, click **Add field** again to close the list.

When adding header fields:

You can add up to three header fields per form. These fields display at the top of the form regardless of how far you scroll.

6. Modify the attributes for each field or section in the Design area toolbar. For example, you can set whether a field (other than memo) takes up half the space on the form or the full space on the form.

Tip: You can also use the Design area toolbar to reorder fields, delete fields, and navigate between fields.

Deleting forms

1. Click  to enter customization.
2. Select the module for the form.
3. Click **Forms**.
4. In the Form management area, select the form to delete.
5. Click **Delete**.

Setting the default form

1. Click  to enter customization.
2. Select the module for the form.
3. Click **Forms**.
4. In the Form management area, select the form that should be the default.

5. Click **Set default**.

See also

- ["Customizing the ALM Web Client" on page 45](#)

Working with business rules

 **Administrators:** As the ALM Web Client administrator, you can customize the end user's ALM Web Client experience using business rules.

To watch a movie on how to build a filter, refer to this section in the ALM Web Client Online Help.

See also

- ["Understanding business rules" below](#)
- ["About business rule activation" on page 52](#)
- ["Defining business rules" on page 53](#)
- ["Customizing the ALM Web Client" on page 45](#)

Understanding business rules

 **Administrators.** Business rules customize the ALM Web Client user interface and control actions users can perform. The rules enable administrators to implement and enforce organizational, departmental, and group policies on a project-by-project basis.

Note: The Business rule feature in the ALM Web Client is not the same as the set of workflow features in ALM Desktop Client. The business rule feature does not work in conjunction with the workflow features.

Business rules contain an action and a condition. You set the action that should occur when the defined condition is true.

Actions

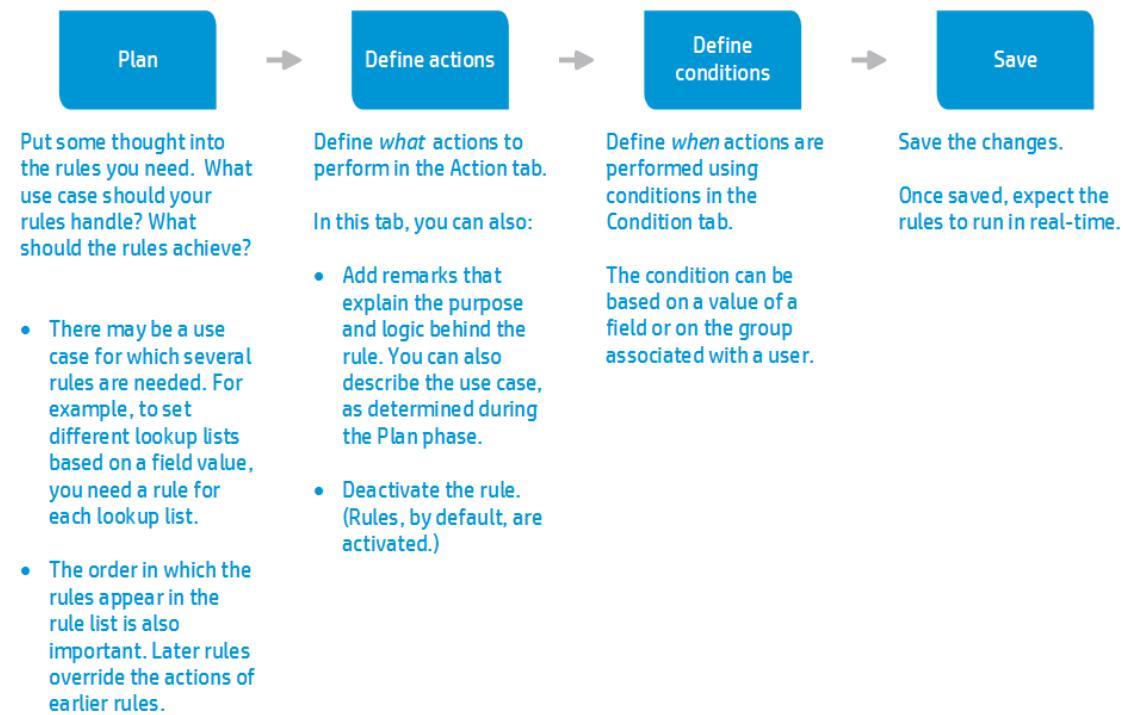
- Most actions affect fields, such as setting a field to read-only, required, or associated with a different look-up list. These actions generally affect organizational policy. You can:
 - Make certain fields required or optional.
 - Make certain fields read-only or editable.
 - Change the values for field look-up lists.

- Some actions affect forms, such as enabling users to choose different form layouts for adding and editing entities. These actions affect usability.

Conditions

Conditions, when met, cause the rule's action to be performed. Conditions can be based on a value of a field or on the group associated with a user.

How to work with rules



Examples of rules you can create

Lookup lists

Depending on the requirement type, possible priorities for requirements might be different. You can create a rule that assigns different look-up lists based on requirement type.

Condition: If the **Requirement Type** field is a specific value...

Action: Use a different look-up list for the requirement's possible **Priority** values.

Required fields

When assigning a defect status to **Open**, it is implied that a developer is assigned to the defect. It would not be appropriate for the **Assigned to** field to be blank.

Condition: If the **Status** field is **Open**...

Action: The **Assigned to** field is required.

Forms

When a tester creates a defect to report a bug, organizational policy dictates that the tester be able to view and edit the following fields: **Summary**, **Description**, **Priority**, and **Severity**.

Similarly, when a developer starts fixing a defect, the developer must be able to view and edit the following fields: **Status**, **Target Cycle**, and **Target Release**.

Define two rules:

- **Rule 1:** Sets a form for developers.

Condition: If the current user belongs to the **Developer** group...

Action: The form for developers is used.

- **Rule 2:** Sets a form for testers.

User's groups

include

Developer

Condition: If the current user belongs to the **Tester** group...

Action: The form for testers is used.

See also

- "[About business rule activation](#)" below
- "[Defining business rules](#)" on the next page
- "[Customizing the ALM Web Client](#)" on page 45
- "[Designing and managing forms](#)" on page 47

About business rule activation

As users work, the ALM Web Client checks to see if the conditions for activated rules are being met. When conditions are met, rule actions are performed.

Note: When creating rules that determine if a field is required or read-only, only one rule can be activated for a specific field. For example, you cannot activate two rules on the field **Priority**, one making the field **Priority** mandatory and the other making the field **Priority** optional, at the same time. Both rules can exist, but they cannot both be activated. For details, see "[Is it possible for my rules to conflict logically, and if so, how does the ALM Web Client handle this?](#)" on page 58

By default rules are activated when they are defined.

Tip: To deactivate a rule after it is defined, select the rule in the Rule list and click **OFF**.

See also

- "[Understanding business rules](#)" on page 50
- "[Defining business rules](#)" below
- "[Customizing the ALM Web Client](#)" on page 45
- "[Designing and managing forms](#)" on page 47

Defining business rules

The ALM Web Client administrator can create business rules on a project-by-project basis.

1. Click  and then **Customization** to enter customization.
2. Select the module for the rule.
3. Click **Rules**. Existing rules display in a grid.

Tip: Rules that are not defined correctly display with a  and individual fields display with a red border.
4. Click **Add Rule**.
5. Set the business rule's action and the condition. See "[Defining actions](#)" on the next page and "[Defining conditions](#)" on page 55.
6. By default, rules are active. For details, see "[About business rule activation](#)" on the previous page.
7. Order the rules. Click **Move Up** or **Move Down** to reorder the rules in the Rules list.

Tip: The rules at the end of the list override the rules earlier in the list. For details, see "[Is it possible for my rules to conflict logically, and if so, how does the ALM Web Client handle this?](#)" on page 58.
8. Click **Save Changes**.

See also

- "[Understanding business rules](#)" on page 50
- "[About business rule activation](#)" on page 52
- "[Defining actions](#)" below
- "[Defining conditions](#)" on the next page
- "[Customizing the ALM Web Client](#)" on page 45
- "[Designing and managing forms](#)" on page 47

Defining actions

You can define rules that:

- Set the Details layout of the requirement or defect, using forms.

Tip: The forms must be defined in the ALM Web Client before creating the rules.

- Set a field to be required or optional
- Set a field to be read-only or editable
- Set a field's lookup list

Tip: The look-up list must be defined in the ALM Desktop Client before creating the rules.

To define actions:

1. Click the **Action** tab.
2. If the desired result is to use a different form layout, choose **Use form** in the **Action** field and choose a form layout in the **Form** field.
3. If the desired result is to change field behavior, choose an action in the **Action** field and pick a field in the **Field** field. (For look-up lists, also choose the look-up list.)
4. Add remarks to explain the purpose and logic behind the rule. Documenting the rule is very important for overall management of business rules.
5. Set conditions. See "[Defining conditions](#)" on the next page.

See also

- "Understanding business rules" on page 50
- "Defining business rules" on page 53
- "Customizing the ALM Web Client" on page 45
- "Designing and managing forms" on page 47

Defining conditions

1. Click the **Condition** tab.
2. Create the condition.

Note: Only one condition can be defined. The condition can be a complex condition.

- a. In the **Field** box, choose a field or **User's Groups**.
- b. In the next box, choose an operator. Depending on the field, different operators are available.
- c. In the **Value** box, enter a value. You can choose the value from a list or enter a value.

Tip: Start typing a field name or a value in the corresponding boxes to search and choose from a list.

3. If necessary, add additional expressions to the condition by choosing **AND** or **OR** in the **Gate** box and clicking .

Tip: You can use parentheses to build sophisticated conditional expressions. Hover over the area where you would like to insert a parenthesis, and click the parenthesis when it appears.

:Before



During hover:



After:

Parentheses can be nested.

If you select a parenthesis, its corresponding open or close parenthesis is highlighted also.

To watch a movie on how to build a filter, refer to this section in the ALM Web Client Online Help.

As you build the condition, a textual representation of the condition is displayed in the **Description** box.

You cannot save the rule if there are errors. Errors include syntax errors, such as an unclosed set of parentheses, or context errors, such as a referenced user-defined field or form being deleted.

4. Click **OK**.

Examples

Desired Result	Action	Field	Form	Condition
For every defect whose status is In Progress , Assigned to must be set. (It would not make sense for a defect to be unassigned yet already being worked on.)	Make field required	Assigned to	NA	Status ≠ New
Developers may switch requirements from one Target Cycle to another, but do not have the authority to assign requirements to a different Target Release .	Make field editable	Target Release	NA	Current User Groups Contains Developers
For a specific product, the project manager has decided that only two levels of priority are necessary: High and Low . Other releases have five levels of priority. Users should use this simpler set of Priority values instead of the default set.	Lookup List	Priority	NA	Product = MyProduct

Desired Result	Action	Field	Form	Condition
Only testers and project managers have the authority to officially close fixed defects. If a tester or project manager opens a defect that is fixed, the CloseDefect form opens. This form displays only the fields that are relevant to closing defects.	NA	NA	CloseDefects	(Current User Groups contains Tester OR Current User Groups contains ProjectManager) AND Status = Fixed

See also

- "[Understanding business rules](#)" on page 50
- "[Defining business rules](#)" on page 53
- "[Customizing the ALM Web Client](#)" on page 45
- "[Designing and managing forms](#)" on page 47

FAQs for business rules

Here are some frequently-asked-questions about working with business rules.

Tip: Do you have some tips you'd like to add? Email us at sw-doc@hp.com.

General

[Are business rules and workflow the same?](#)

No. The Business rule feature in the ALM Web Client is not the same as the set of workflow features in ALM Desktop Client. The business rule feature does not work in conjunction with the workflow features.

ALM Desktop Client workflow is based on events and the timing of these events. Events trigger all workflow activities.

Business rule conditions, however, are constantly being evaluated in the ALM Web Client. Their corresponding actions are performed as soon as the condition exists without any user intervention and without any specific event being triggered.

[Which modules support business rules?](#)

You can create rules for the Requirements module and the Defects module in the ALM Web Client.

[Are the business rules that I define for the entire site?](#)

Business rules are defined on a project-by-project basis. You can have different sets of business rules for each project.

Rule validation

Does the ALM Web Client perform any validation on my rules?

Yes. The ALM Web Client checks for the following:

- **Syntax.** The ALM Web Client does not let you save a set of rules if even one of the rules is syntactically invalid. For example, if a parenthesis is missing, a red border is displayed around the lone parenthesis.
- **Missing entities.** If a rule refers to an entity that once existed but no longer does (for example, if a user-defined form was deleted since the rule was created), the rule is skipped and its action is not performed. Essentially, the rule is treated as if it is deactivated.

No errors are issued. However, you can check the ALM Server log files to see if any rules were skipped.

Note: It is possible for an entity , such as a form, to be deleted and then subsequently , a new form be created with the same name. This new form might have no similarity to the original form. In this case, the rule's action is performed without errors, yet with unexpected results.

Is it possible for my rules to conflict logically, and if so, how does the ALM Web Client handle this?

It is possible for the conditions of multiple rules in one project to be true at the same time. If these rules have conflicting actions, the ALM Web Client processes both of them in the order they are specified in the rule list. Therefore, the later one in the list overrides the actions set by the earlier one.

Use the **Move up** and **Move down** buttons to order the rules.

Examples

- Two rules can have overlapping conditions on the same field.

One rule's condition could be **Closing Date > December 31st, 2014** and another rule's condition could be **Closing Date < February 1st 2015**. If the closing date is in the month of January, which rule's action is performed? The rule that is defined later in the rule list is the one whose action is performed.

- Two rules can have overlapping conditions on different fields.
 - A rule, **SetFormForDev**, sets the form for the Defects module to a form called **DevForm** if the user assigned to the defect belongs to the developer group. This form includes fields that are relevant to developers and hides fields that are relevant only to testers and project managers.
 - A rule, **SetFormPlanning**, sets the form for the Defects module to a form called **DevTeamLeadForm** if the **Estimated Fix Time** of the defect is greater than 1 week. The **DevTeamLeadForm** only displays fields that are related to planning and scheduling

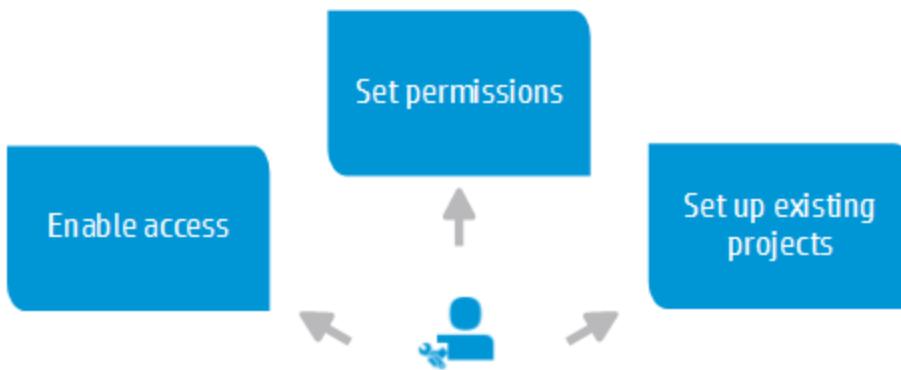
of defects for a particular release and cycle.

- Because a developer team lead is likely to be in the developer group, both of these conditions can be true for one particular defect.
- If the **SetFormDev** rule appears after the **SetFormPlanning** rule in the rule list, the **DevTeamLead** form will never be used. In this case, the **SetFormDev** rule must be before the **SetFormPlanning** in the list.

See also

- ["Working with business rules" on page 50](#)

Chapter 6: Managing projects



As the ALM Web Client administrator, you must set up end-user access to the ALM Web Client.

Enabling access to the ALM Web Client

To enable end users to access the ALM Web Client, the ALM administrator must set up access in the ALM Desktop Client.

- In Site Administration, add the **ALLOW_WEBUI_ACCESS** site parameters and set its value to **Y**. For details, see the listing of optional ALM parameters under "Setting ALM Configuration Parameters" in the Site Administration part of the *HP Application Lifecycle Management Administrator Guide*.
- In Project Customization, make sure relevant groups have **Allow Web UI Full Project Access** or **Allow Web UI View Project Access** permissions. For details, see "Managing User Groups and Permissions" in the Project Customization part of the *HP Application Lifecycle Management Administrator Guide*.

Setting permissions for ALM Web Client users

ALM Web Client user permissions are based on the user groups defined in the ALM Desktop Client. Make sure that ALM Web Client users are assigned to the appropriate user groups in ALM Desktop Client Customization. For details, see the *HP Application Lifecycle Management Administrator Guide*.

Setting up existing projects for use in the ALM Web Client

Most ALM Web Client users have projects already in use in ALM Desktop Client. For best practices, see "Setting up existing ALM Desktop Client projects for use in the ALM Web Client" on the next page.

See also

- "FAQs for managing projects" on page 63
- "Customizing the ALM Web Client" on page 45

Setting up existing ALM Desktop Client projects for use in the ALM Web Client

The ALM Web Client's flexible view and filter features let you view requirements in different ways without being locked into a physical requirement hierarchy. Creating a hierarchical tree in the ALM Web Client is unnecessary and clutters the view.

If your project's requirement tree already exists in the ALM Desktop Client, it is likely that a physically hierarchical requirement tree is already defined.

How to re-factor the requirements in the tree in the ALM Desktop Client for use in the ALM Web Client

1. Back up the project in Site Administration. For details, see the *HP Application Lifecycle Management Administrator Guide*.
2. Open the project in the ALM Desktop Client.
3. Take a look at the requirements tree and all its child requirements. Make sure that there are no inaccuracies. For example, If the tree has folders for releases and cycles, make sure that all release and cycle fields are correct based on their parent requirement locations in the tree. Make corrections as necessary.
4. Copy all sub-trees and requirements into the main root folder of the requirement tree.
Make sure to rename requirements if there are requirements from different sub-trees with the same name.
5. Delete all folders under the main root folder. The requirement tree is now one level.

How to work with requirements in both the ALM Desktop Client and the ALM Web Client

- After re-factoring the requirements, to simulate the use of folders and sub-trees in the ALM Desktop Client, use the sort and group by features of ALM. This is similar to using the view and filter features in the ALM Web Client.

See also

- "[Managing projects](#)" on the previous page
- "[FAQs for managing projects](#)" on the next page
- "[Displaying what you need](#)" on page 11

FAQs for managing projects

 **Administrators:** Here are some frequently-asked-questions for administrators about managing projects.

Tip: Do you have some tips you'd like to add? Email us at sw-doc@hp.com.

Logging in and accessing the ALM Web Client

Who should I let access the ALM Web Client and its modules?

Limit access to suitable candidates as described in the "The ALM Web Client Overview" on page 5.

Access to individual modules is based on the permissions of the group to which the user belongs. Setting permissions are defined described in the *HP Application Lifecycle Management Administrator Guide*.

I would like my project users to get familiar with the ALM Web Client. However, until workflow rules can be implemented, I prefer we enter data using the ALM Desktop Client. How can I enforce this?

You can let users try the ALM Web Client on a read-only basis. This is useful for familiarizing users with the ALM Web Client without impacting actual data. See the **Allow Web Client Full Project Access** and **Allow Web Client View Project Access** group permissions in the Customization part of the *HP Application Lifecycle Management Administrator Guide*.

My computer crashed and ALM Web Client Customization thinks I'm already logged in. How can I get back into Customization?

Only one administrator is able to log into ALM Web Client Customization at a time,

If, for some reason, your computer crashed and the ALM Web Client thinks you are still logged in, open Customization in another browser. When prompted, override the existing lock.

I want to open several sessions of the ALM Web Client, logging in as different users. Is this possible?

You can open several sessions of the ALM Web Client by opening additional browser windows. (You cannot open multiple sessions using different tabs in the same browser window.) Each session in a browser window consumes a different license.

I want to open several sessions of the ALM Web Client, logging in as the same user. Is this possible?

You can open several ALM sessions at the same time, consuming one license overall:

- The ALM Web Client in a browser window
- The ALM Desktop Client in a different browser window
- ALM on a mobile device

In this case, only one license is consumed, not three.

Setting up the ALM Web Client

My requirements tree in the ALM Desktop Client is organized into folders. But the ALM Web Client's flexible view and filter features let me view my requirements as I wish without being locked into a physical requirement hierarchy. What's the best way to organize my requirements?

When using the ALM Web Client, it is best to use views and filters to organize requirements. This allows for a more flexible display, with less clutter. For details on how to set up requirements for use in the ALM Web Client, see "[Setting up existing ALM Desktop Client projects for use in the ALM Web Client](#)" on page 62.

Communicating with customer support

Preparing log files for support

If you encounter a problem using the ALM Web Client, you can use your browser's Tools Console to send customer support any warnings, errors, or messages that occur. For example, in Internet Explorer, press **F12** and select the Console tab to see the log messages.

See also

- ["Managing projects" on page 61](#)

We appreciate your feedback!

If you have comments about this document, you can [contact the documentation team by email](#). If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on User Guide (ALM Web Client 12.00)

Just add your feedback to the email and click send.

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