HP ALM

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Business Views Microsoft Excel Add-in User Guide

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HP ALM Business Views Microsoft Excel Add-in User Help

Welcome to HP Application Lifecycle Management (ALM).

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

Business View Excel Reports Overview

A business view is a data layer that exists on top of the database and which reflects only those project entity fields that represent information that is useful from a business perspective.

For example, a business view based on the Baselines entity could contain the **Name**, **Description**, and **Baseline ID** fields. This is because these fields convey information that could be of importance to the consumer who needs to understand baseline information from a business perspective only. By the same logic, the same business view would not include the **Attachment** and **Auto complete type** fields, as they are of little business significance.

Business views can be based on single entities, such as **Baselines** or **Defects**, while others can represent more complex relationships between entities, such as **Defects With Linked Requirements**.

In addition to the pre-defined business views, additional views can be created in Project Customization. For more information, refer to the *HP Application Lifecycle Management Administrator Guide*.

You can create and modify Business View Excel reports in Microsoft Excel. This enables you to analyze your data using any of the capabilities available in Excel, and then upload the report to ALM.

Business View Excel reports can be created using data from multiple projects.

For task details, see "How to Generate a Business View Excel Report" below.

How to Generate a Business View Excel Report

This task describes how to analyze data in ALM using Business View Excel reports.

To learn more about business view Excel reports, see "Business View Excel Reports Overview" above.

This task includes the following steps:

- "Prerequisites" on the next page
- "Log in to ALM from Microsoft Excel" on the next page
- "Add a Business View Excel report to the analysis tree" on the next page
- "Create a Business View Excel report" on page 7
- "Configure the Business View Excel report" on page 7

1. **Prerequisites**

   To verify supported versions of Microsoft Excel, refer to the *HP Application Lifecycle Management Readme*.

   > **Note:** In Microsoft Excel 2013, you can only open one Business View Excel report at a time.

   Install the HP ALM Business Views Microsoft Excel add-in from the HP Application Lifecycle Management Add-ins page. You can access the Add-ins page in ALM from **Help > Add-ins**.

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

2. **Log in to ALM from Microsoft Excel**

   If you access Microsoft Excel directly, and not through ALM, you must log in to ALM from Microsoft Excel.

   a. Open Microsoft Excel.

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

   c. Enter the login information. Select **Standard Authentication** or **External Authentication**.

      i. For **Standard Authentication**, enter the ALM server URL, Login Name, and Password, and click **Authenticate**.

      ii. For **External Authentication**, enter the web server URL and click **External Authentication**.

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

3. **Add a Business View Excel report to the analysis tree**

   Add a Business View Excel report to a folder in the analysis tree.

   a. **Open the Analysis View module.** On the ALM sidebar, under **Dashboard**, select **Analysis View**.

   b. **Add a folder to the analysis tree.** Right-click a folder under the Private or Public root folder, and select **New Folder**.

   c. **Create a new Excel report.** Right-click a folder, and select **New Business View Excel Report**. Enter a name for the Business View Excel report in the New Business View Excel Report dialog box.

      > **Note:** If there is a newer version of the HP ALM Business Views Microsoft Excel add-in, a dialog box appears to update the add-in on your machine.

4. **Create a Business View Excel report**

   Create the Business View Excel report in Excel.

   a. **Open Excel.** In ALM's Analysis module, in the Configuration tab, click **New Excel**. Excel opens with the HP ALM tab on the ribbon. For user interface details, see "HP ALM Tab - Microsoft Excel" on page 9.

   b. **Open the Add Worksheet dialog box.** In the HP ALM tab, click **Add** to add business view Excel worksheets in the same Excel book, or click **New Report** to add business view Excel worksheets in a new Excel book.

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

5. **Configure the Business View Excel report**

   Configure the Business View Excel report in Excel.

   a. **Select the fields to be included in the report.** In the Fields tab of the Worksheet Configuration pane, select the fields to be removed from the report. To select multiple fields, use the SHIFT or CTRL keys. For user interface details, see "Worksheet Configuration Pane - Fields Tab" on page 12.

   b. **Filter the data to be included in the report.** In the Filter tab of the Worksheet Configuration pane, select the fields to be filtered and enter the filter criteria. For user interface details, see "Worksheet Configuration Pane - Filter Tab" on page 14.

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

   c. **Sort the report.** In the Sort tab of the Worksheet Configuration pane, select the fields by which the report is sorted and set the sorting criteria. For user interface details, see "Worksheet Configuration Pane - Sorting Tab" on page 16.

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

   d. **Select the projects to be included in the report.** In the Advanced tab of the Worksheet Configuration pane, select **Include domain and project name** and select the projects to include in the report. For user interface details, see "Worksheet Configuration Pane - Advanced Tab" on page 18.

   e. **Edit the query.** In the Advanced tab of the Worksheet Configuration pane, click **Edit Query** to configure the report by directly editing the DQL query. For user interface details, see "Edit Query Dialog Box" on page 19.

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

6. **Import the Business View Excel report to ALM**

   You can upload the Business View Excel report directly to ALM from Excel. In Excel, click the arrow under the **Save** button and select **Save to ALM**. For details, see "Save Business View Excel Report Dialog Box" on page 22.

Alternatively, you can save the report as a file in Excel and upload it later to ALM. To upload the file in ALM:

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

   b. In the Configuration tab in ALM's Analysis module, click   .

   c. **Select the Business View Excel report.** In the search window, navigate to the desired file and click **Open**. The selected file name is shown in the **File name** field.

7. **Generate a Business View Excel report**

   Generating a Business View Excel report refreshes all the data, saves the Excel file, and opens it in Excel.

   a. In the **Analysis** view in ALM, click   .

   b. In the Configuration tab, click **Generate**.

   c. **Save the Business View Excel report.** In the search window, navigate to the desired location to save the report and click **Save**. The report is saved and opens in Excel.

Business Views Excel Reports User Interface

This section includes:
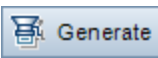
Configuration Tab – Business View Excel Reports

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

To access	1. On the ALM sidebar, under **Dashboard**, select **Analysis View**.
	2. Expand the analysis tree, and select a Business View Excel report.
	3. Click the **Configuration** tab.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"Business View Excel Reports Overview" on page 5

User interface elements are described below:

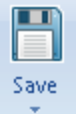| UI Element	Description
Generate	Generates the selected Business View Excel report in Excel.
New Excel	Opens Excel to create a new Business View Excel report.
Install Addin	Installs or uninstalls the Business View Excel add-in in Excel. **Note:** This install only installs the add-in for the specific user, not for all users.
Upload Excel Report File	Enables you to upload a Business View Excel report to ALM.

HP ALM Tab – Microsoft Excel

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

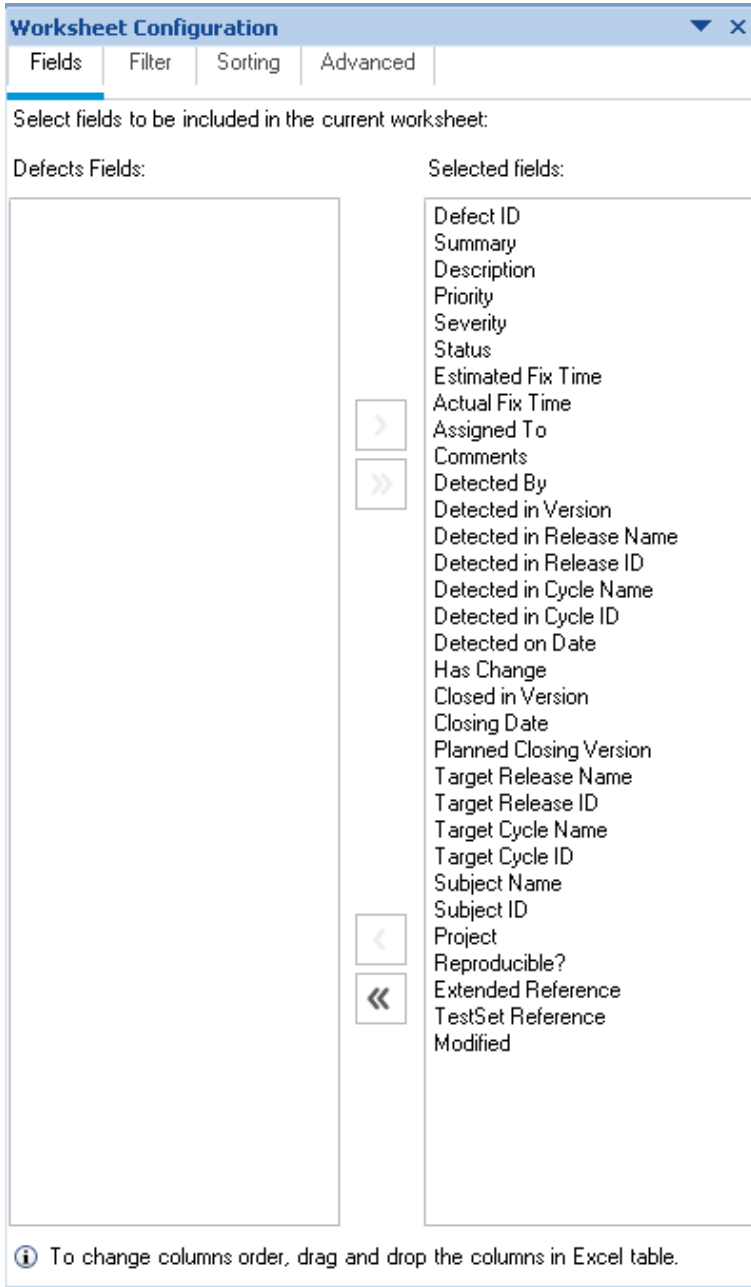| To access | 1. On the ALM sidebar, under **Dashboard**, select **Analysis View**. |
	2. Expand the analysis tree, and select a Business View Excel report.
	3. Click the **Configuration** tab.
	4. Click **New Excel**. Microsoft Excel opens.
	5. Click the **HP ALM** tab.
Relevant tasks	"How to Generate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

User interface elements are described below:

UI Element	Description
Login	**Login.** Opens the login screen to log in to ALM.
Logout	**Logout.** Logs out of ALM.
Switch Project	**Switch Project.** Opens the login screen to switch to another project in the same ALM session.
Add	**Add.** Opens the Add Worksheet dialog box to create a new worksheet for each selected business view.
Show Configuration	**Show Configuration.** Toggles the Worksheet Configuration pane.
☑ Auto Refresh	**Auto Refresh.** Automatically refreshes the active worksheet each time its configuration is changed.
Row Limit 30	**Row Limit.** Sets the maximum number of rows shown in each Business View worksheet. **Note:** Set the value to zero to retrieve all rows.
Refresh	**Refresh.** Refreshes the current worksheet.
Refresh All	**Refresh All.** Refreshes all worksheets.
New Report	**New Report.** Opens the Add Worksheet dialog box to create a new worksheet for each selected business view in a new Excel workbook.
Open	**Open.** Opens a business view Excel workbook from a file or from the ALM Analysis View tree.

UI Element	Description
Save	**Save.** Saves the current Business View Excel workbook to a file or to the ALM Analysis View tree.
Options	**Options.** Opens the HP ALM Addin Options dialog box. See "Business View Options Dialog Box" on page 21 for details.
Help	**Help.** Opens the HP Application Lifecycle Management Help for the add-in. **Note:** The help opens only when you are logged in to ALM.

Worksheet Configuration Pane - Fields Tab

The worksheet configuration pane enables you to configure the Business View Excel report.

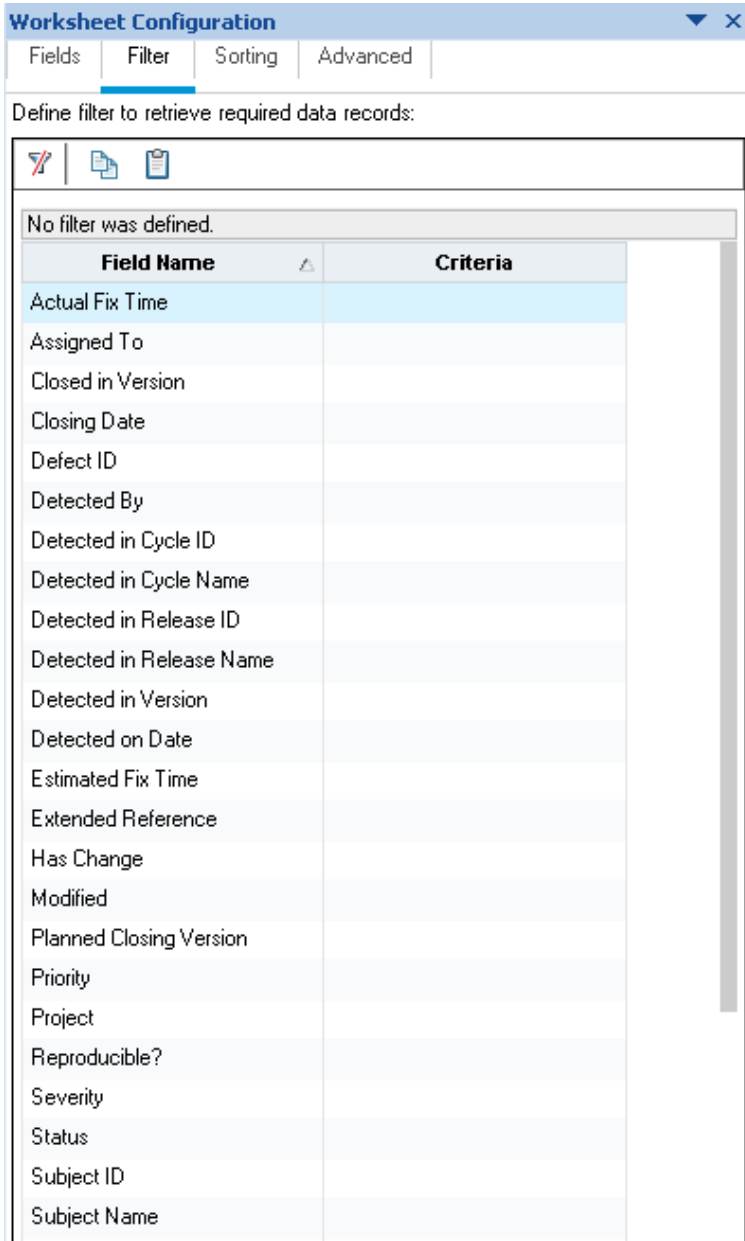| To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
Important information	• To hide the Worksheet Configuration pane, click the **Show Configuration** button. Clicking the button again reopens the Worksheet Configuration pane.

	• If you click in the Excel worksheet outside the actual report, the Worksheet Configuration pane closes. Click in the report to reopen the pane. • To change the order of the columns in the report, drag and drop the columns in the Excel table.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"HP ALM Tab - Microsoft Excel" on page 9

The **Fields** tab of the worksheet configuration pane enables you to select the fields to be included in the report. User interface elements are described below (unlabeled elements are shown in angle brackets):

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

Worksheet Configuration Pane – Filter Tab

The worksheet configuration pane enables you to configure the Business View Excel report.

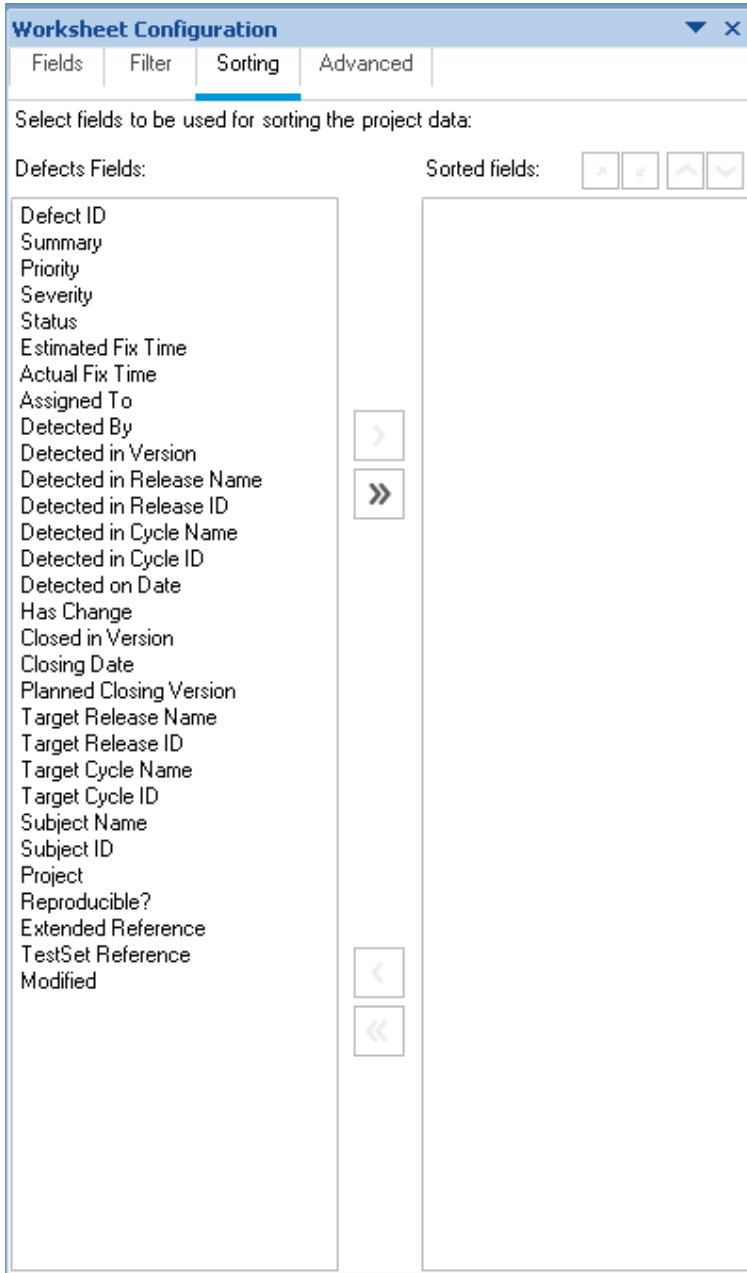| To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
	3. Select the **Filter** tab.
Important information	• To hide the Worksheet Configuration pane, click the **Show Configuration** button. Clicking the button again reopens the Worksheet Configuration pane.

	• If you click in the Excel worksheet outside the actual report, the Worksheet Configuration pane closes. Click in the report to reopen the pane.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"HP ALM Tab - Microsoft Excel" on page 9

The **Filter** tab of the worksheet configuration pane enables you to filter the data to be included in the report. User interface elements are described below:

UI Element	Description
	Clear Filter. Clears the filter settings defined in the Filter tab.
	Copy Filter Settings. Copies the filter settings to the Clipboard.
	Paste Filter Settings. Pastes the filter settings from the Clipboard.
Criteria	Click to set the filter criteria for the specific field. The **Select Filter Condition** dialog box opens.
Field Name	Alphabetical list of the Report Headings.

Worksheet Configuration Pane - Sorting Tab

The worksheet configuration pane enables you to configure the Business View Excel report.

To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
	3. Select the **Sorting** tab.
Important	• To hide the Worksheet Configuration pane, click the **Show Configuration** button. Clicking the

information	button again reopens the Worksheet Configuration pane.
	• If you click in the Excel worksheet outside the actual report, the Worksheet Configuration pane closes. Click in the report to reopen the pane.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"HP ALM Tab - Microsoft Excel" on page 9

The **Sorting** tab of the worksheet configuration pane enables you to sort the report. User interface elements are described below (unlabeled elements are shown in angle brackets):

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

Worksheet Configuration Pane – Advanced Tab

The worksheet configuration pane enables you to configure the Business Views Microsoft Excel Report, and to select the projects to include in the report.

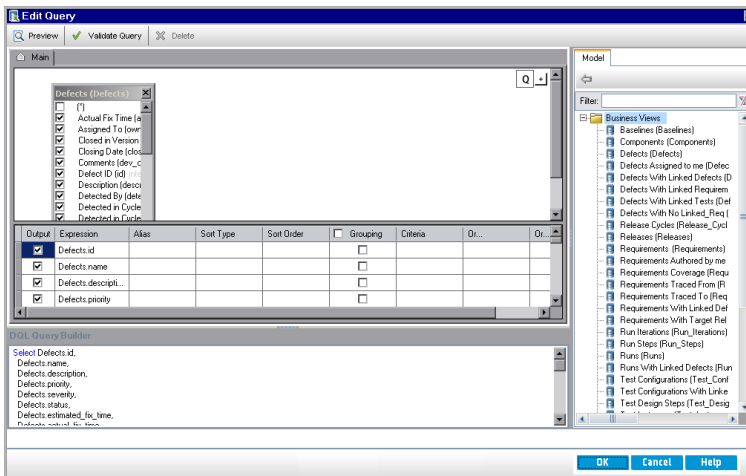| To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
	3. Select the **Advanced** tab.

Important information	• To hide the Worksheet Configuration pane, click the **Show Configuration** button. Clicking the button again reopens the Worksheet Configuration pane.
	• If you click in the Excel worksheet outside the actual report, the Worksheet Configuration pane closes. Click in the report to reopen the pane.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"HP ALM Tab - Microsoft Excel" on page 9

The **Advanced** tab of the worksheet configuration pane enables you to configure the report by directly editing the DQL query, and to select the projects to include in the report. User interface elements are described below:

UI Element	Description
Dataset Query	The DQL query used to create the report.
Edit Query	Click to edit the DQL query. The **Edit Query** dialog box opens. For more information, see "Edit Query Dialog Box" below.
Use current project only	Select if only the current project is to be included in the Business Views Microsoft Excel Report.
Include domain and project name	Select to show the domain and project name in the Business Views Microsoft Excel Report.
Domain	The domains included in the Business Views Microsoft Excel Report.
Project	The projects included in the Business Views Microsoft Excel Report.
Select Projects	Click to select projects to include in the Business Views Microsoft Excel Report. The **Select Projects** dialog box opens. For more information, see "Select Projects Dialog Box" on page 21.

Edit Query Dialog Box

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

To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
	3. In the Advanced tab of the the Worksheet Configuration pane, click **Edit Query**.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"Worksheet Configuration Pane - Advanced Tab" on page 18

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

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

Select Projects Dialog Box

The Select Projects dialog box enables you to select the projects to include in the Business Views Microsoft Excel Report.
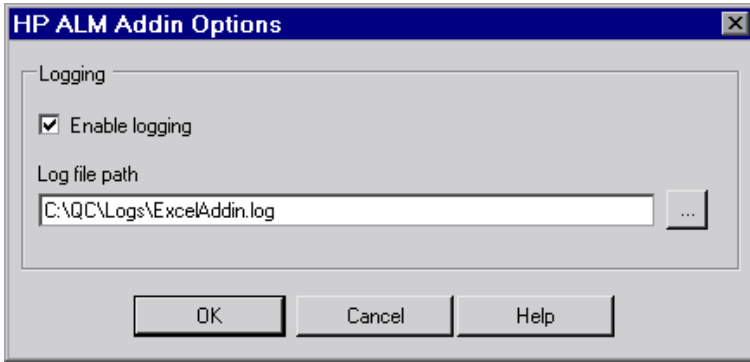

To access	1. In the HP ALM tab in Excel, click **Add** or **New Report**.
	2. Select the business view and click **OK**.
	3. In the Advanced tab of the the Worksheet Configuration pane, unselect **Use current project only** and click **Select Projects**.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"Worksheet Configuration Pane - Advanced Tab" on page 18

User interface elements are described below:

UI Element	Description
✖ Remove Project	Removes the selected project from the list of domains and projects in the Main pane.
Main pane	Displays a list of domains and projects to be included in the Business Views Microsoft Excel Report.
Projects Tree pane	Displays available projects. To add a project to the report, select it and click **Add** ⬅. Alternatively, you can add projects by dragging them to the Main pane.

Business View Options Dialog Box

This dialog box enables you to set the options for the Business View Excel report.
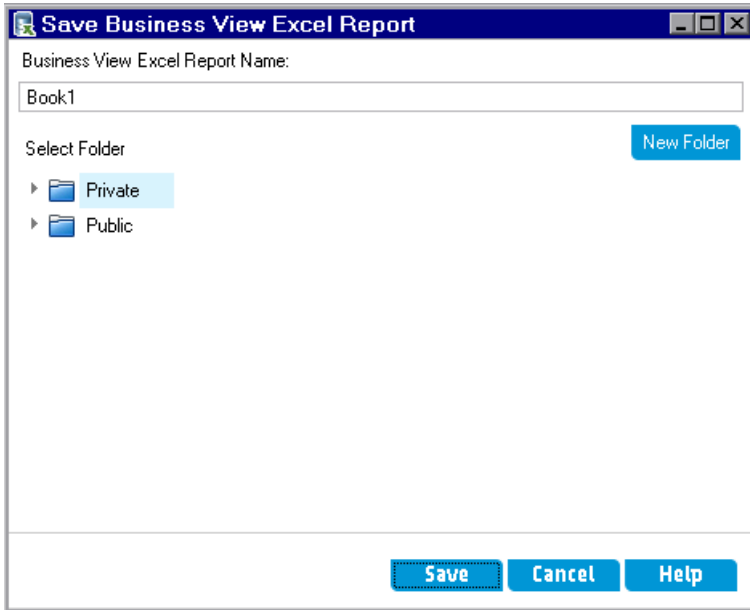
To access	In the HP ALM tab in Excel, click **Options**.
Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"HP ALM Tab - Microsoft Excel" on page 9

User interface elements are described below:

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

Save Business View Excel Report Dialog Box

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

To access	On the HP ALM tab in Excel, click the arrow under the **Save** button and select **Save to ALM**.

Relevant tasks	"How to Generate a Business View Excel Report" on page 5
See also	"HP ALM Tab - Microsoft Excel" on page 9

User interface elements are described below:

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

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