

HP Quality Center

Software Version: 10.00

Microsoft Excel Add-in Guide

Document Release Date: February 2012

Software Release Date: January 2009



Legal Notices

Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Third-Party Web Sites

HP provides links to external third-party Web sites to help you find supplemental information. Site content and availability may change without notice. HP makes no representations or warranties whatsoever as to site content or availability.

Copyright Notices

© Copyright 1993 - 2012 Hewlett-Packard Development Company, L.P.

Trademark Notices

Microsoft® is a U.S registered trademark of Microsoft Corporation.

Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To check for recent updates, or to verify that you are using the most recent edition of a document, go to:

<http://h20230.www2.hp.com/selfsolve/manuals>

This site requires that you register for an HP Passport and sign-in. To register for an HP Passport ID, go to:

<http://h20229.www2.hp.com/passport-registration.html>

Or click the **New users - please register** link on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Support

Visit the HP Software Support web site at:

<http://www.hp.com/go/hpsoftwaresupport>

This web site provides contact information and details about the products, services, and support that HP Software offers.

HP Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support web site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To register for an HP Passport ID, go to:

<http://h20229.www2.hp.com/passport-registration.html>

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

Table of Contents

Welcome to This Guide	7
How This Guide is Organized.....	7
Chapter 1: Installing the Microsoft Excel Add-in.....	9
Installing the Microsoft Excel Add-in	9
Additional Step after Upgrading Microsoft Excel	12
Chapter 2: Formatting Data.....	13
Guidelines for Formatting.....	13
Formatting Requirements.....	15
Formatting Tests.....	17
Formatting Defects	18
Chapter 3: Exporting Data to Quality Center	21
Considerations For Exporting Data to Quality Center	21
Version Control Considerations	22
Exporting Data to Quality Center	23

Table of Contents

Welcome to This Guide

Welcome to the HP Quality Center Microsoft Excel Add-in, which enables you to export requirements, tests, and defects from Microsoft Excel directly to HP Quality Center.

Note: This guide explains how to use Microsoft Excel with Quality Center. For additional information on using Quality Center, refer to the *HP Quality Center User Guide*.

How This Guide is Organized

This guide contains the following chapters:

Chapter 1 **Installing the Microsoft Excel Add-in**

Describes how to install the Microsoft Excel Add-in.

Chapter 2 **Formatting Data**

Describes how to format requirement, test plan, or defect data in a Microsoft Excel worksheet.

Chapter 3 **Exporting Data to Quality Center**

Describes how to export the Microsoft Excel worksheet to Quality Center.

Welcome to This Guide

1

Installing the Microsoft Excel Add-in

To export requirements, test plans, or defects from Microsoft Excel to Quality Center, you must install the Microsoft Excel Add-in on your client machine.

This chapter includes:

- Installing the Microsoft Excel Add-in on page 9
- Additional Step after Upgrading Microsoft Excel on page 12

Installing the Microsoft Excel Add-in

Before you install the Microsoft Excel Add-in, make sure that Microsoft Excel is installed on your machine.

Note: To install this add-in, you must log in with administrator privileges.

To install the Microsoft Excel Add-in:

- 1** Close Microsoft Excel.
- 2** Uninstall any previous versions of the Microsoft Excel Add-in.
In the list of currently installed programs, look up either TestDirector Microsoft Excel Add-in or Quality Center Microsoft Excel Add-in.
- 3** If you are logged in to Quality Center or Site Administration, select **Help > Add-ins page**. Proceed to step 6 on page 11.

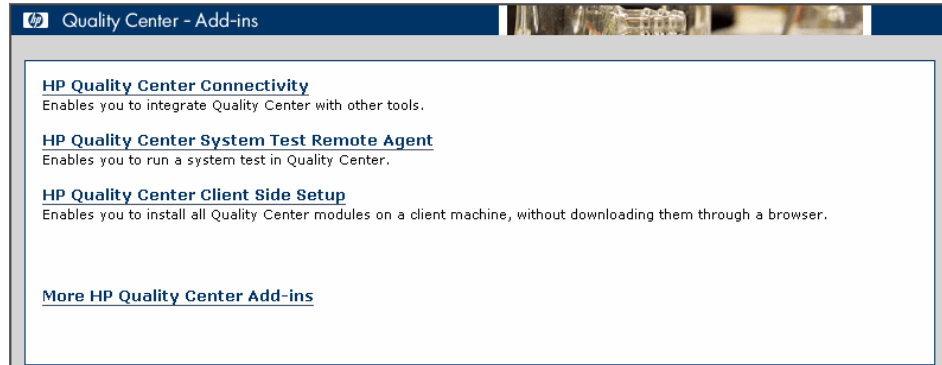
Chapter 1 • Installing the Microsoft Excel Add-in

- 4** Open your Web browser and type your HP Quality Center URL: `http://<Quality Center server name>[:port number]/qcbn`. The HP Quality Center Options window opens.



- 5** Click the **Add-ins Page** link.

6 The HP Quality Center Add-ins page opens.



Click the **More HP Quality Center Add-ins** link. The More HP Quality Center Add-ins page opens.

- 7 Under Microsoft Office Add-ins, click the **Microsoft Excel Add-in** link. The Microsoft Excel Add-in page opens.
- 8 Click the **Download Add-in** link. Follow the on-screen installation instructions.
- 9 Navigate back to the HP Quality Center Add-ins page and click the **HP Quality Center Connectivity** link. The HP Quality Center Connectivity Add-in page opens.
- 10 Click **Download Add-in** and install the HP Quality Center Connectivity Add-in on your Quality Center client machine.
- 11 After you install the Excel Add-in, configure your Microsoft Excel security settings. For more information on configuring Excel security settings, refer to the Microsoft Excel documentation.
- 12 If you upgrade to a new version of Microsoft Excel after installing the Quality Center Microsoft Excel Add-in, you must perform an additional step to work with this add-in. For more information, see “Additional Step after Upgrading Microsoft Excel” below.
- 13 To access this guide, choose **Start > Programs > Quality Center 10.00 > Integrations > Microsoft Add-ins**.

Additional Step after Upgrading Microsoft Excel

If you upgrade to a new version of Microsoft Excel after installing the Quality Center Microsoft Excel Add-in, you must copy the **TDAddin** folder and the **TDEExcelAddin.xla** file from

<drive>:\Program Files\Microsoft Office\Office<old version #>\XLStart
to <drive>:\Program Files\Microsoft Office\Office<new version #>\XLStart.

Examples:

- ▶ If you upgraded Microsoft Excel XP (2002) to Microsoft Excel 2003, copy the **TDAddin** folder and the **TDEExcelAddin.xla** file from
<drive>:\Program Files\Microsoft Office\Office10\XLStart
to <drive>:\Program Files\Microsoft Office\Office11\XLStart
- ▶ If you upgraded Microsoft Excel 2007 to Microsoft Excel 2010, copy the **TDAddin** folder and the **TDEExcelAddin.xla** file from
<drive>:\Program Files (x86)\Microsoft Office\Office12\XLStart
to <drive>:\Program Files (x86)\Microsoft Office\Office14\XLStart

2

Formatting Data

Before you can export requirements, tests, and defects from Excel to Quality Center, you must format the data. This chapter explains how to format the data in Microsoft Excel.

This chapter includes:

- Guidelines for Formatting on page 13
- Formatting Requirements on page 15
- Formatting Tests on page 17
- Formatting Defects on page 18

Guidelines for Formatting

When formatting requirements, tests, or defects in your Excel worksheet, consider the following:

- Arrange the records that you want to export in rows.
- For each field that you want to export, designate a column. Make sure to include all the required fields for requirements, tests, and defects, as defined in your Quality Center project .
- **Automatic mapping.** The Microsoft Excel Add-in can automatically map Quality Center fields to worksheet columns. To enable automatic mapping:
 - Include a header row with heading names that are identical to the Quality Center field names.
 - The automatic mapping scans the header row for matching fields until the first empty cell. Make sure not to leave empty cells in the header row.

- Make sure that each requirement, test, or defect contains data for all the required fields, as defined in your Quality Center project.
- To export multiple values to Quality Center fields that support multiple values, separate the values with a semicolon (;) character.
- Field data must not exceed the field size in Quality Center.
- Data intended for Quality Center fields that have selection lists must match the entries in those selection lists exactly. For example, the **Priority** field can accept only one of the following values: **5-Urgent**, **4-Very High**, **3-High**, **2-Medium**, or **1-Low**.
- Only plain text and hyperlinks are exported to Quality Center. Any graphics are ignored, and formatting is removed.
- You can export attachments for requirements, tests, or defects. For more information, see “Formatting Attachments” on page 14.
- Each requirement, test, or design step on the same hierarchical level must have a unique name. If a name is not unique, it will be overwritten. For example, if your worksheet contains two requirements on the same hierarchical level with the same name, only one is created.

For additional guidelines on formatting requirements, tests, or defects, see “Formatting Requirements” on page 15, “Formatting Tests” on page 17, and “Formatting Defects” on page 18.

Formatting Attachments

When formatting attachments for requirements, tests, or defects, consider the following:

- Designate a separate column for attachments.
- To include attachments for test design steps, designate a separate column for design step attachments.
- An attachment can be either a **File** or a **URL**.
- To export a file, specify the file name with its full path. For example, C:\file1.txt. Alternatively, type a hyperlink in the cell that points to the file.
- To export a URL, save the URL in a shortcut file, and then specify the full file path. You cannot enter a URL directly in the worksheet.

Formatting Requirements

Before you export your requirements to the Quality Center Requirements module, you format the requirements in your worksheet.

Consider the following points when formatting requirements:

- ▶ **Requirement types.** If your requirements include multiple requirement types:
 - ▶ Designate a **Requirement Type** column. For each requirement, specify the requirement type.
 - ▶ For each requirement, include data for the required fields of the specific requirement type.
- ▶ To create a child requirement:
 - ▶ Make sure that the parent requirement is already defined in Quality Center. Define the parent requirement in the Requirements module before you commence exporting to Quality Center. Alternatively, in your Excel worksheet, above the child requirement row, add an additional row and define the path of the parent requirement.
 - ▶ Add a **Path** column to the Excel worksheet. In the **Path** column, type the path under which the requirement is created. Separate each hierarchical level with a backslash (\) character. Make sure not to use a forward slash.
- ▶ If you enter data in a **Target Cycle** or **Target Release** field, you must include the path preceding the cycle or release. Separate each hierarchical level with a backslash (\) character. For example: parent1\parent2\TC1. Make sure not to use a forward slash. If a Target Release or Target Cycle value is unique, you do not need to include its preceding hierarchy.
- ▶ If you enter data in a **Target Cycle** field, you must also enter data in the **Target Release** field.

The following example illustrates these points.

	A	B	C	D	E	F
1	Name	Requirement Type	Author	Priority	Product	Path
2	Requirement_1	Business	alex_qc	5-Urgent	Mercury Tours Web Site	
3	Requirement_2	Functional	shelly_qc	3-High	Mercury Tours Web Site	Requirement_1
4	Requirement_3	Testing	shelly_qc			Requirement_1
5	Requirement_4	Testing	shelly_qc			Requirement_1\Requirement_3

The worksheet contains data columns for the **Name**, **Requirement Type**, **Author**, **Priority**, and **Product** fields.

The **Path** column does not correlate to a Quality Center field. It is used to indicate the hierarchical level of each requirement. For example, *Requirement_1* does not have an entry in that column, indicating that it is on the top hierarchical level. The path defined for *Requirement_2* and *Requirement_3* indicates that these requirements are child requirements of *Requirement_1*. The path defined for *Requirement_4* indicates that it is a child of *Requirement_3*.

Requirement_3 and *Requirement_4* are defined as the **Testing** requirement type and do not have entries in the **Priority** and **Product** columns. **Priority** and **Product** are not required fields for the **Testing** requirement type.

After you export the requirements to Quality Center, *Requirement_1* is displayed under the root requirement, and the other requirements are displayed on other hierarchical levels below *Requirement_1*. *Requirement_3* and *Requirement_4* do not have entries in the **Priority** and **Product** fields.

Name	Requirement Type	Author	Priority	Product
Requirements	Folder			
Requirement_1	Business	alex_qc	5-Urgent	Mercury Tours Web Site
Requirement_2	Functional	shelly_qc	3-High	Mercury Tours Web Site
Requirement_3	Testing	shelly_qc		
Requirement_4	Testing	shelly_qc		

For additional formatting guidelines, see “Guidelines for Formatting” on page 13.

To format a requirement:

- 1 Open your Excel worksheet.
- 2 Define each requirement on a separate row. For each requirement, you must define all required fields as defined in your Quality Center project.
- 3 Export the requirements to Quality Center. For more information, see Chapter 3, “Exporting Data to Quality Center.”

Formatting Tests

Before you export your tests to the Quality Center Test Plan module, you format the tests in your worksheet.

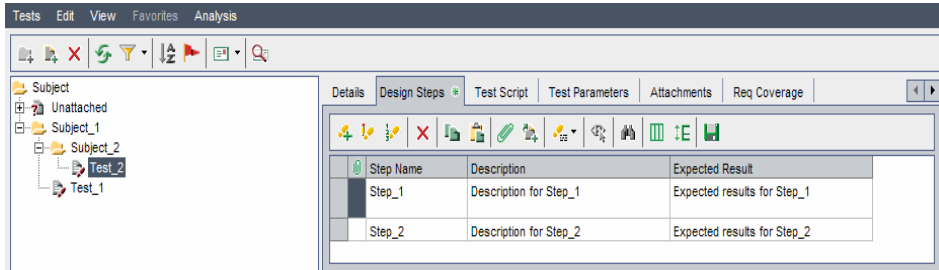
Consider the following points when formatting tests:

- ▶ **Subject.** Designate a **Subject** column, where you specify the test subject folder in which the test is created. To create tests in subfolders of the Test Plan tree, separate each hierarchical level with a backslash (\) character. Make sure not to use a forward slash.
- ▶ **Design steps.** Enter each design step on a separate row. Identify the test under which the design step is included by typing the **Subject** and **Test Name**.

The following example shows two tests. Each test contains two design steps. The **Subject** column indicates the hierarchical level of each subject test folder in the test plan tree. For example, *Subject_1* and *Subject_2* are on different hierarchical levels. *Subject_2* is a subfolder of *Subject_1*. *Subject_1* is placed directly beneath the pre-defined **Subject** root folder.

	A	B	C	D	E	F
1	Subject	Test Name	Description	Step Name	Step Description	Expected Results
2	Subject_1	Test_1	Description for Test_1	Step_1	Description for Step_1	Expected results for Step_1
3	Subject_1	Test_1		Step_2	Description for Step_2	Expected results for Step_2
4	Subject_1\Subject_2	Test_2	Description for Test_2	Step_1	Description for Step_1	Expected results for Step_1
5	Subject_1\Subject_2	Test_2		Step_2	Description for Step_2	Expected results for Step_2

After you export the tests to Quality Center, *Subject_1* contains *Test_1* and *Subject_2* contains *Test_2*. The subject test folders are on different hierarchical levels.



For additional formatting guidelines, see “Guidelines for Formatting” on page 13.

To format a test:

- 1 Open your Excel worksheet.
- 2 Define each test on a separate row. For each test, you must define all required fields as defined in your Quality Center project.
- 3 Export the tests to Quality Center. For more information, see Chapter 3, “Exporting Data to Quality Center.”

Formatting Defects

Before you export your defects to the Quality Center Defects module, you format the defects in your worksheet.

Consider the following points when formatting defects:

- If you enter data in a **Detected in Release**, **Detected in Cycle**, **Target Release**, or **Target Cycle** field, you must include the path preceding the release or cycle. Separate each hierarchical level with a backslash (\) character. For example: parent1\parent2\TC1. Make sure not to use a forward slash. If a Target Release or Target Cycle value is unique, you do not need to include its preceding hierarchy.

- If you enter data in a **Detected in Cycle** or **Target Cycle** field, you must also enter data in the **Detected in Release** or **Target Release** field.

For example, suppose you want to export the following defects:

	A	B	C	D	E	F	G
1	Summary	Detected By	Detected on Date	Status	Subject	Severity	Priority
2	The list of flights is given w	alex_qc	28/02/2006	Open	Flight Reservation	3-High	3-High
3	The list of available flights	shelly_qc	28/02/2006	Open	Flight Reservation	5-Urgent	5-Urgent
4	The list of flights is given w	alex_qc	28/02/2006	Open	Flight Reservation	3-High	3-High
5	Nothing happened when p	shelly_qc	28/02/2006	Open	Flight Reservation	5-Urgent	5-Urgent

After you export the defects to Quality Center, the defects are displayed in the Defects module.

The screenshot shows the Quality Center Defects module interface. The menu bar includes Defects, Edit, View, Favorites, and Analysis. The toolbar contains icons for New Defect, Refresh, Filter, Print, Attach, Flag, Print Preview, and Search. The main area displays a table of defects with the following data:

Defect ID	Summary	Detected By	Detected on	Status	Subject	Severity	Priority
1	The list of flights is given when past	alex_qc	28/02/2006	Open	Flight Reservation	3-High	3-High
2	The list of available flights is not giver	shelly_qc	28/02/2006	Open	Flight Reservation	5-Urgent	5-Urgent
3	The list of flights is given when Depa	alex_qc	28/02/2006	Open	Flight Reservation	3-High	3-High
4	Nothing happened when pressing V	shelly_qc	28/02/2006	Open	Flight Reservation	5-Urgent	5-Urgent

Note: When a Quality Center defect field has an input mask, the mask is not checked when you export defects from Excel to Quality Center.

For additional formatting guidelines, see “Guidelines for Formatting” on page 13.

To format a defect:

- 1 Open your Excel worksheet.
- 2 Define each defect on a separate row. For each defect, you must define all required fields as defined in your Quality Center project.
- 3 Export the defects to Quality Center. For more information, see Chapter 3, “Exporting Data to Quality Center.”

3

Exporting Data to Quality Center

After you define requirements, tests, or defects in your worksheet, you can export them to Quality Center.

This chapter includes:

- ▶ Considerations For Exporting Data to Quality Center on page 21
- ▶ Version Control Considerations on page 22
- ▶ Exporting Data to Quality Center on page 23

Considerations For Exporting Data to Quality Center

- ▶ To export data to Quality Center, you must first map Quality Center fields to the Excel worksheet columns. The Microsoft Excel Add-in can map fields automatically. For automatic mapping to succeed, the column headings in your worksheet must be identical to the field names in Quality Center.
- ▶ When you export a new or existing requirement, test, or defect to Quality Center, it is created with the user name that you use to export it. For example, if you export a defect to Quality Center with `alex_qc` as the user name, the defect's history shows `alex_qc` as the person who changed the defect.

- ▶ You cannot export the following Quality Center fields from Excel:

Module Name	Field Name
Requirements	Date, Time, Modified, ReqID, Direct Cover Status
Test Plan	Modified, Test Step Actual, Test Step Exec Date, Test Step Exec Time, Test Step Source ID, Status
Defects	Defect ID, Modified

Note: You must have full create and modify permissions in Quality Center for the type of record that you are exporting. For example, if you are exporting tests, you must have permissions for adding and modifying the test plan tree, design steps, and folders.

Version Control Considerations

You can export requirements or tests from Microsoft Excel to a version control enabled project in Quality Center.

Consider the following when exporting to a version control enabled project:

- ▶ When you export a new requirement or test, it is created in Quality Center, with a checked in status.
- ▶ When you export an existing requirement or test that is checked in, it is automatically checked out during export. Quality Center adds a comment to the version history specifying that the requirement or test was updated by export from Excel.
- ▶ If you export an existing requirement or test that is checked out by the same user that you use to export the data, the data is exported. If the requirement or test is checked out by another user, the export fails and an error message is displayed.

For more information on version control, refer to the *HP Quality Center User Guide*.

Exporting Data to Quality Center

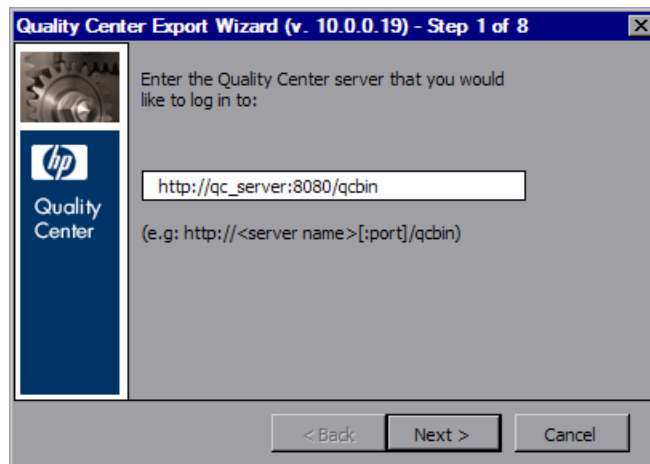
You export data to Quality Center from your Excel worksheet.

Tip: Before you begin the export process, you need to ensure that the column names and letters remain visible. You can either reduce the zoom level of the worksheet so that all the columns are visible, or copy the column names and letters to a separate application.

To export data to Quality Center:

- 1** Define the requirements, tests, or defects in your worksheet. For more information, see Chapter 2, “Formatting Data.”
- 2** Select the cells that contain the data that you want to export. Do not include the column headings row in your selection.
- 3** In Excel, open the Quality Center Export wizard:
 - **Excel 2000, XP, and 2003.** Choose **Tools > Export to Quality Center.**
 - **Excel 2007 and 2010.** Click the **Add-ins** tab and click the **Export to Quality Center** button.

The Quality Center Export Wizard - Step 1 of 8 dialog box opens.



Type your Quality Center server and the virtual directory name
(`http://<Quality Center server name>[:<port number>]/qcbn`).

For example, `http://qc_server:8080/qcbn`.

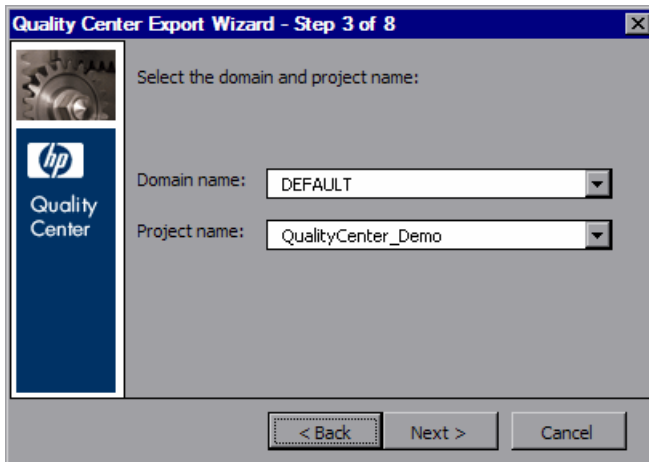
- 4 Click **Next**. The Quality Center Export Wizard - Step 2 of 8 dialog box opens.



The dialog box is titled "Quality Center Export Wizard - Step 2 of 8". It features a blue sidebar on the left with the HP logo and the text "Quality Center". The main area has a gear icon and the instruction "Enter your user name and password:". Below this are two text input fields: "User Name:" and "User Password:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Type your user name and password.

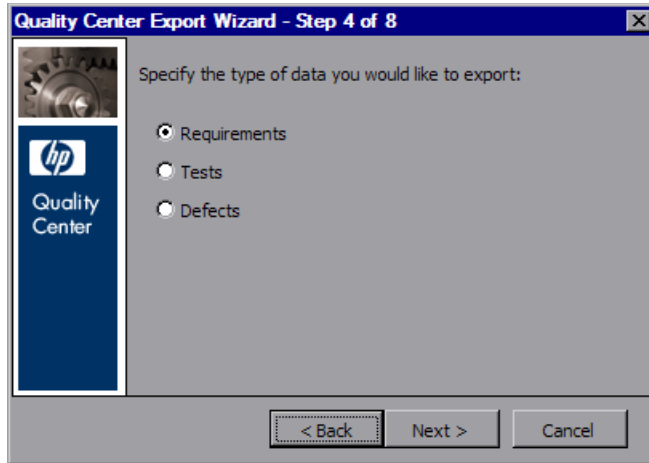
- 5 Click **Next**. The Quality Center Export Wizard - Step 3 of 8 dialog box opens.



The dialog box is titled "Quality Center Export Wizard - Step 3 of 8". It features a blue sidebar on the left with the HP logo and the text "Quality Center". The main area has a gear icon and the instruction "Select the domain and project name:". Below this are two dropdown menus: "Domain name:" with "DEFAULT" selected, and "Project name:" with "QualityCenter_Demo" selected. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

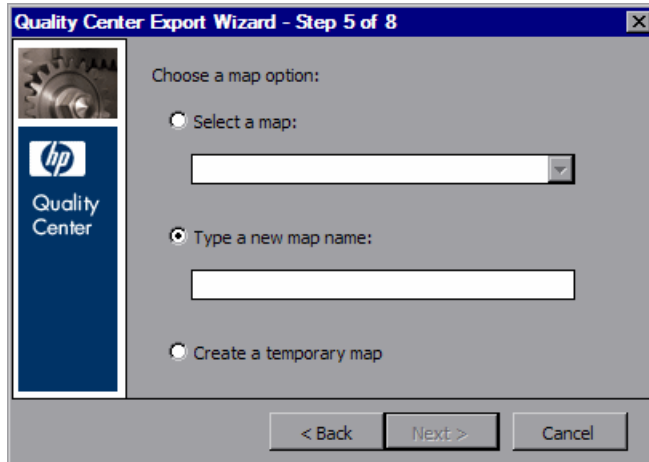
Select a domain and project name.

- 6 Click **Next**. The Quality Center Export Wizard - Step 4 of 8 dialog box opens.



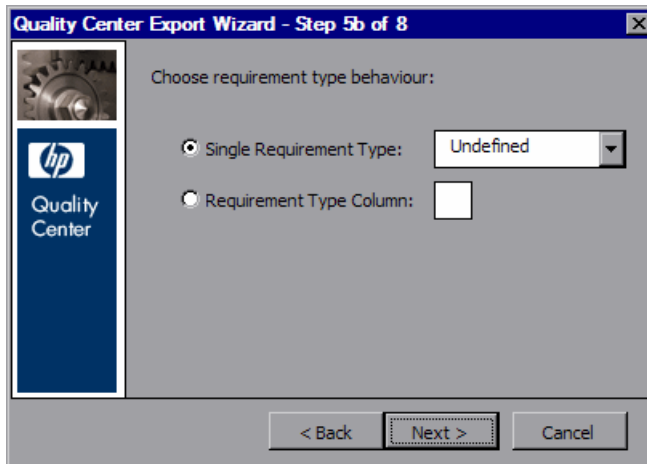
Select a data type.

- 7 Click **Next**. The Quality Center Export Wizard - Step 5 of 8 dialog box opens.



To specify a map option for mapping Quality Center fields to Microsoft Excel columns, select one of the following:

- ▶ **Select a map.** Select an existing map that you created on the same machine. If this option is unavailable, and you upgraded to a new version of Microsoft Excel, you may need to perform an additional step. For more information, see “Additional Step after Upgrading Microsoft Excel” on page 12.
 - ▶ **Type a new map name.** Create a new map. This map is saved for reuse on the same machine.
 - ▶ **Create a temporary map.** Create a temporary map that will not be saved.
- 8 Click **Next**. If you are exporting requirements, the Quality Center Export Wizard - Step 5b of 8 dialog box opens.



Select one of the following options:


- ▶ **Single Requirement Type.** Select a requirement type to assign to all requirements you are exporting.
- ▶ **Requirement Type Column.** Enter the column letter in your worksheet that contains the requirement types.

- 9 Click **Next**. The Quality Center Export Wizard - Step 6 of 8 dialog box opens.



The left pane displays all the available Quality Center fields for the data type that you selected in Step 4 of the Export Wizard. Required fields are displayed in red. The right pane displays the mappings of Quality Center fields to columns in your Excel worksheet. If you selected **Requirement Type Column** in Step 5b of the Export Wizard, the mapping of the **Requirement Type** field is displayed as read-only. To change the mapping, click **Back**.

If you are exporting requirements of several requirement types, all required fields in any of the requirement types are displayed in red.

- 10 To map fields manually, proceed to step 14 on page 28.
- 11 To map fields automatically, first make sure that no fields, other than **Requirement Type**, are mapped in the right pane.
-  12 Click the **Map fields by label** button. The Map Fields by Labels dialog box opens. Type the row number in the worksheet that contains the column headings, and click **OK**. The Microsoft Excel Add-in scans the selected worksheet row for headings that match Quality Center fields.
- 13 After the automatic mapping completes, a report opens with the number of fields that were mapped, and a list of worksheet columns that were not mapped. Click **OK** to close the report. The mappings display in the right pane of the Quality Center Export Wizard - Step 6 of 8 dialog box.



- 14** To manually map a Quality Center field to a corresponding worksheet column, choose a field name from the list on the left, and click the **Export field** button. Alternatively, double-click the field name. The Map Field with Column dialog box opens. Type a corresponding Excel column letter and click **OK**. The mapping displays in the right pane.



- 15** To undo a mapping, select a mapping in the right pane, and click the **Remove field from export list** button. To undo all the mappings, click the **Remove all fields from export list** button.

Note: If you are using an existing map which includes a mapping to the field **Type**, the add-in updates it to map to the field **Old Type (obsolete)**.

- 16** Click **Export**. The Quality Center Export Wizard - Step 7 of 8 dialog box opens.
- 17** If an error occurs while exporting the worksheet, the Quality Center Export Wizard - Scan Error Report dialog box opens.

Review the errors. To save the errors as a text file, click the **Launch Notepad** button.

The row numbers in the error report refer to the rows that you selected, and do not correspond to the worksheet row numbers. For example, Row 1 indicates the first row you selected.

Click **Close** to exit the wizard. Correct the errors and start again at step 1 on page 23.

- 18** If you successfully exported your worksheet to Quality Center, the Quality Center Export Wizard - Step 8 of 8 dialog box opens. Click **Finish**.
- 19** Refresh the view in Quality Center. Review the exported data and make the necessary additions and adjustments.