

HPE ALM Microsoft Word Add-in

Software Version: 12.55

Microsoft Word Add-in User Guide



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Welcome to This Guide

Welcome to the HPE Application Lifecycle Management Microsoft Word Addin, which enables you to export requirement data or test plan data from a Microsoft Word document directly to the ALM Requirements module or Test Plan module.

This guide explains how to use Microsoft Word with ALM. For additional information on using ALM, refer to the *HPE Application Lifecycle Management User Guide*.

How This Guide is Organized

This guide contains the following chapters:

| Chapter | Description |
|--------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| "Installing the HPE ALM Microsoft Word Add-in" on page 5 | Describes how to install the HPE ALM Microsoft Word Add-in. |
| "Formatting Requirement and Test Plan Data" on page 6 | Describes how to format requirement data and test plan data in a Word document. |
| "Exporting Data to ALM" on page 24 | Describes how to export the data to ALM. |

Chapter 1: Installing the HPE ALM Microsoft Word Add-in

This chapter describes how to install the HPE ALM Microsoft Word Add-in on your client computer. This add-in enables you to export requirements or test plans from Microsoft Word to ALM.

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

Note: To install this add-in for all users, you must log in with administrator privileges. The Word Add-in setup package does not allow the current user to install the add-in if the administrator has already installed the add-in for all users.

To install the HPE ALM Microsoft Word Add-in:

1. Close Microsoft Word.
2. Uninstall any previous versions of the HPE ALM Microsoft Word Add-in. To uninstall, choose **Start > Settings > Control Panel > Add/Remove Programs** and follow the instructions on your screen.
3. Open the HPE ALM Add-ins page.
4. Click the **Add-ins for Microsoft Applications** link.
5. Locate the **Microsoft Word Add-in** link. Download the add-in and follow the on-screen installation instructions.
6. Configure your Microsoft Word security settings after you install the Word Add-in. For more information on configuring Word security settings, refer to the Microsoft Word documentation.
7. **Optional:** After you install the Word Add-in, you can configure the user group that can access the Word Add-in by specifying the name in the **WORD_ADDIN_GROUP** site administration parameter. If you do not specify a group for this site parameter, all users can access the Word Add-in.
For general details on configuring parameters using ALM Site Administration, see http://alm-help.saas.hpe.com/en/Latest/online_help/Content/Admin/sa_configuration_parameters_toc.htm.
For details on this specific parameter, see the HP ALM Site Parameter documentation: http://alm-help.saas.hpe.com/en/Latest/api_refs/site_params/metadata.htm
8. Before you use the Word Add-in for the first time on your machine, you must download the ALM client. Navigate to the ALM login screen, and the appropriate files are downloaded to your machine.
9. To access this guide, choose **Start > Programs > HPE ALM 12.55 > Integrations > Microsoft Add-ins**.

Chapter 2: Formatting Requirement and Test Plan Data

The HPE ALM Microsoft Word Add-in installs macros in Word. You use these macros to format requirement or test plan data in your Word document.

This chapter includes:

- [About Formatting Requirement and Test Plan Data](#) 7
- [The Microsoft Word Add-in Toolbars](#) 7
- [Formatting Requirement Data](#) 8
- [Formatting Test Plan Data](#)16
- [Deleting Formatting from the Document](#)22

About Formatting Requirement and Test Plan Data

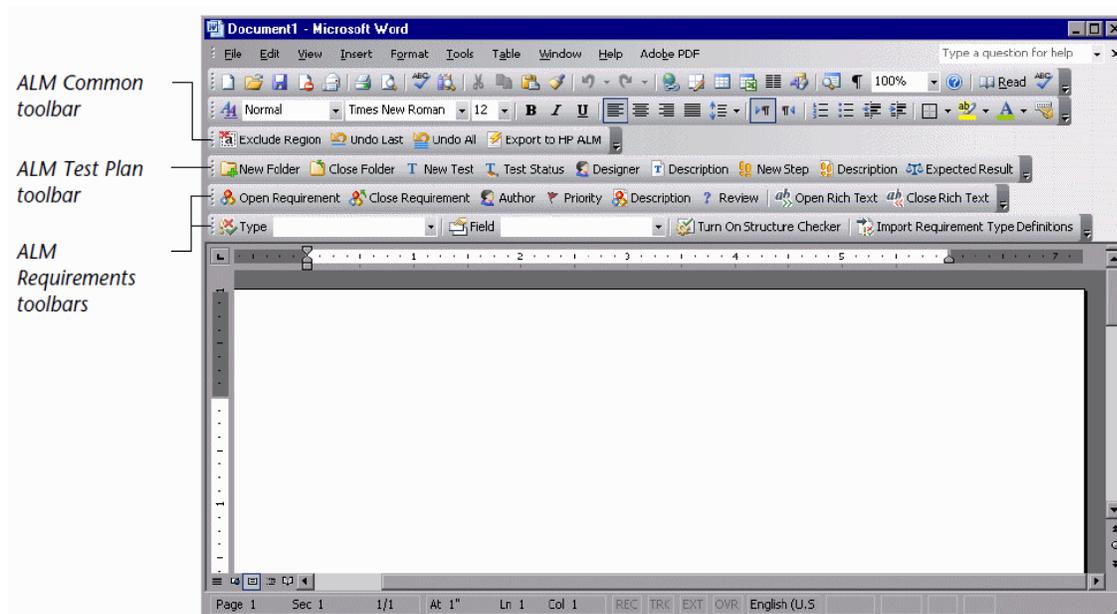
Before you can export requirement and test plan data from Word to ALM, your data must be placed in your document as paragraphs or as tables. Then you use the HPE ALM Microsoft Word Add-in toolbar buttons to mark the requirement or test plan fields. Any text in the document that is not marked is ignored.

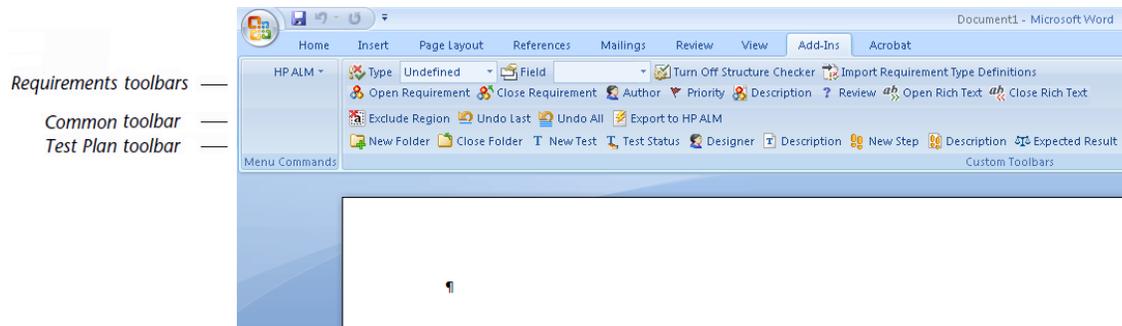
You can format the requirements so that when you export them to ALM, the requirements are on the same hierarchical level, or on different hierarchical levels in the requirements tree. When formatting a test plan, you can format the subject folders on the same hierarchical level, or on different hierarchical levels in the test plan tree.

Note: When formatting test plans, you can specify design steps, because they are stored together with the tests. However, you cannot export information indirectly related to requirements or test plans. For example, if exporting test plans, you cannot specify the requirements covered by each test.

The Microsoft Word Add-in Toolbars

After you install the HPE ALM Microsoft Word Add-in and enable the macros, the Microsoft Word Add-in toolbars are available.





The HPE ALM Microsoft Word Add-in adds the following toolbars:

- **ALM Common toolbar.** Contains buttons commonly used when exporting requirements and test plans.
- **ALM Test Plan toolbar.** Contains buttons used when formatting test plans.
- **ALM Requirements toolbars.** Contain buttons used when formatting requirements.

To display or hide the Microsoft Word Add-in toolbars:

Click the **Add-ins** tab. Click the **HPE ALM** button and choose the toolbar you want to display or hide.

Formatting Requirement Data

Before you can export requirement data from a Word document to ALM, data must be placed as paragraphs or as tables. In addition, if you want to export requirement types and user-defined fields, you must first import their definitions from your ALM project.

You then use the Microsoft Word Add-in toolbar buttons to mark the requirement fields. You can format the requirements so that when you export them to ALM, the requirements are on the same hierarchical level, or on different hierarchical levels in the requirements tree.

This section includes:

- [Placing the Requirement Data in the Document](#) 9
- [Importing Requirement Types](#) 9
- [Marking the Requirement Fields](#)10
- [Example: Requirements on the Same Hierarchical Level](#)12
- [Example: Requirements on Different Hierarchical Levels](#) 14

Placing the Requirement Data in the Document

The Word document can contain requirement data as paragraphs or as tables.

When the data are provided as paragraphs, each field of the requirement must be on a separate line. For each requirement, the name of the requirement must appear first, followed by other requirement fields. The following example shows data for two requirements placed as paragraphs:

Req_1
Functional Requirement
alex_alm
3-High
Rich text for Req_1
Description for Req_1
Req_2
Functional Requirement
shelley_alm
5-Urgent
michael_alm
Description for Req_2

When the document contains a table, each row must contain the data for a requirement. The first column must be the name of the requirement. The following example shows the data for the same two requirements, listed in a table:

| Name | Requirement Type | Author | Priority | Rich Text | User-Defined Fields | Description |
|-------|------------------------|--------------------|----------|---------------------|---------------------|-----------------------|
| Req_1 | Functional Requirement | <u>alex_alm</u> | 3-High | Rich text for Req_1 | | Description for Req_1 |
| Req_2 | Functional Requirement | <u>shelley_alm</u> | 5-Urgent | | <u>michael_alm</u> | Description for Req_2 |

Importing Requirement Types

You can import definitions for requirement types and their associated user-defined fields from an ALM project to your Word document. You can then define and export the requirement type for each requirement in your Word document. After you define a requirement type for a requirement, you can export values for user-defined fields that are available for requirements of that type.

To import requirement types from an ALM project:

1. Click . The Requirement Type Definitions Wizard - Step 1 of 5 dialog box opens.

Type your ALM URL: http://<ALM server name>[:port]/qcbn.

For single sign-on users, enable **Add basic auth header mode**.



Note: **Add basic authentication header mode** is optional, and should only be enabled if you get an **invalid server response** message.

2. Click **Next**. The Requirement Type Definitions Wizard - Step 2 of 5 dialog box opens.
Enter your ALM user name and password.
3. Click **Next**. The Requirement Type Definitions Wizard - Step 3 of 5 dialog box opens.
Select an ALM domain and project.
4. Click **Import**. The Requirement Type Definitions Wizard - Step 4 of 5 dialog box opens. The add-in imports the requirement types and user-defined fields from the ALM project.
5. After the add-in imports the requirement types and user-defined fields, the Requirement Type Definitions Wizard - Step 5 of 5 dialog box opens. Click **Finish**. The requirement types and user-defined fields are updated in the Word document.

Marking the Requirement Fields

After placing your data as paragraphs or as tables, you must mark your requirement fields. To mark a requirement field, highlight the text and click the appropriate button on the ALM Requirements toolbar. An icon is added next to the marked text line. A bookmark is inserted into the document to allow the add-in to identify the marked text when it is exported to ALM.

When marking requirement fields, consider the following:

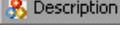
- For each requirement, the requirement name must be provided. You can also export the requirement type, review status, author, priority, description, and rich text. In addition, if you export the requirement type, you can export data for user-defined fields available for the type.
- If a requirement with the same name exists in the requirements tree, the fields of the requirement are changed to contain the new values. If your document contains two requirements on the same hierarchical level with the same name, only the second requirement is created.
- If the review status is not provided, the default value is **Not Reviewed**.
- The data for each field should be on the same line as the icon that marks it. The only exceptions are the **Description** field, memo user-defined fields, and rich text.
 - Data for the **Description** field can extend to additional lines and can include returns and indents.
 - Data for memo user-defined fields can extend to additional lines but only the first line is exported to ALM.
 - Rich text data can include any content that you can include in a regular Word document. When rich text data are exported to ALM, the rich text data are added as an attachment to the requirement. The attachment is named **Legacy_Rich_Content.doc**.

Note: With every additional export of this requirement to ALM, the **Legacy_Rich_Content.doc** file is overwritten.

- Data intended for ALM fields that have selection lists must match the entries in those selection lists exactly. For example, the **Priority** field can only accept one of the following entries: **5-Urgent**, **4-Very High**, **3-High**, **2-Medium**, or **1-Low**.
- You cannot export data for user-defined fields that do not exist in the ALM project, or which are not available for the requirement type.

To mark the requirement fields:

1. Open a Word document containing requirement text.
2. You can use the Structure Checker to ensure that you do not insert bookmarks that invalidate the structure. For example, the Structure Checker makes sure that you do not add more than one name to a requirement, or close a requirement before you have opened it. To switch the Structure Checker on or off, in the ALM Requirements toolbar, click the **Turn On Structure Checker** button or **Turn Off Structure Checker** button.
3. Highlight a text line or a table cell in your document, and click the appropriate button in the ALM Requirements toolbar:

| Field | Toolbar Button | Icon |
|----------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| requirement name |  |  |
| review status of the requirement |  |  |
| author of the requirement |  |  |
| priority of the requirement |  |  |
| Description of the requirement |  |  |

4. To assign a requirement to a type, add and highlight a new text line in the data for the requirement, or add a new table column and highlight the cell in the new column corresponding to the requirement. In the ALM Requirements toolbar, in the **Type** box, select a requirement type. Click the **Type** button to add the requirement type to the document. The requirement type is added and is indicated by the Requirement Type icon .
5. To assign a value to a user-defined field, highlight the text line or table cell in your document containing the value. In the ALM Requirements toolbar, in the **Field** box, select a user-defined field. Click the **Field** button to mark the value with the User Defined Field icon .
6. To add rich text to be exported to ALM, highlight the rich text and click the **Open Rich Text** button. The Open Rich Text icon  is added to indicate the beginning of the rich text.

Place the cursor at the end of the rich text you want to add and click the **Close Rich Text** button.

The Close Rich Text icon  is added to indicate the end of the rich text.

7. Repeat for all requirement data. Any text in the document that is not marked is ignored.
8. Click the **Close Requirement** button to close each requirement with the Close Requirement icon .
The location of this mark depends on whether the requirements are on the same hierarchical level or on different hierarchical levels.
For more information, see ["Example: Requirements on the Same Hierarchical Level"](#) below or ["Example: Requirements on Different Hierarchical Levels"](#) on page 14.
9. To unmark one or more fields, use the undo buttons or remove the mark manually. For more information, see ["Deleting Formatting from the Document"](#) on page 22.
10. When all requirement fields have been marked, export the requirements to ALM. For more information, see ["Exporting Data to ALM"](#) on page 24.

Example: Requirements on the Same Hierarchical Level

To define requirements on the same hierarchical level in the requirements tree, use the Close Requirement button to place the Close Requirement mark directly after each requirement. This causes a requirement to be placed on the same level as the preceding requirement.

When the document contains paragraphs, insert a line after the last line of the requirement and mark it with the Close Requirement mark:

 Req_1
 Functional Requirement
 alex_alm
 3-High
 Rich text for Req_1

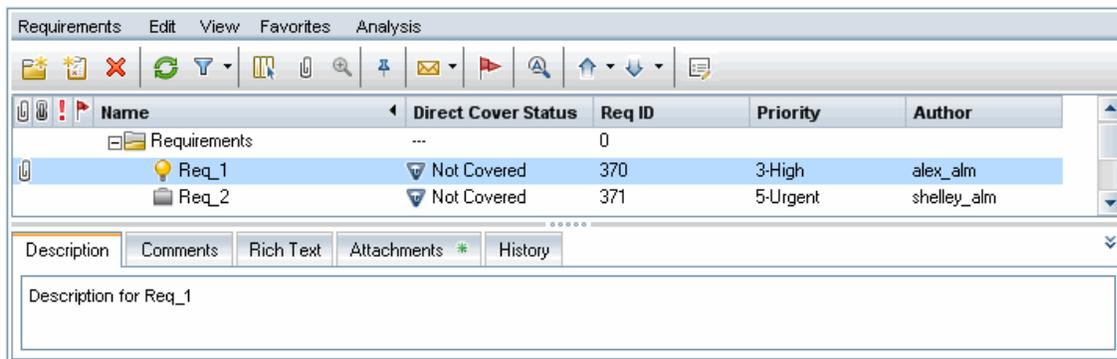
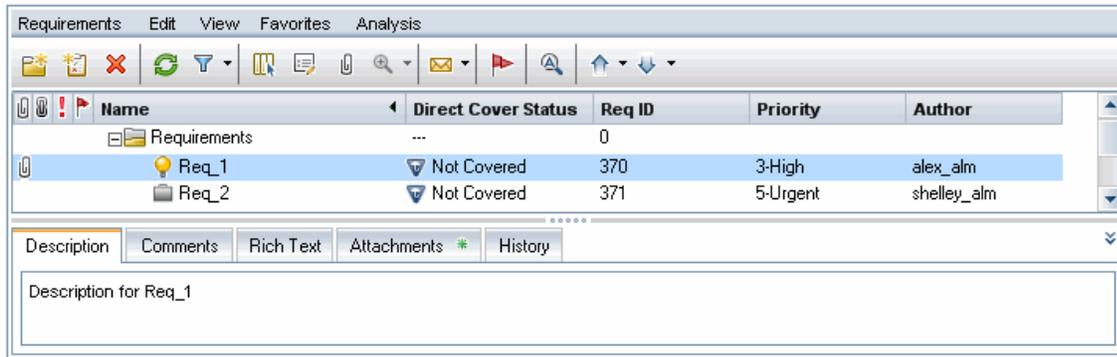
 Description for Req_1

 Req_2
 Business Requirement
 shelley_alm
 5-Urgent
 Reviewer: michael_alm
 Description for Req_2


When the document contains a table, add a column to the end of the table, and insert the Close Requirement mark for each requirement:

| Name | Requirement Type | Author | Priority | Rich Text | User-Defined Fields | Description | |
|-------|------------------------|-------------|----------|---------------------|-----------------------|-----------------------|--|
| Req_1 | Functional Requirement | alex_alm | 3-High | Rich text for Req_1 | | Description for Req_1 | |
| Req_2 | Business Requirement | shelley_alm | 5-Urgent | | Reviewer: michael_alm | Description for Req_2 | |

After you export the requirements to ALM, the requirements are displayed on the same hierarchical level, under the root requirement.



Example: Requirements on Different Hierarchical Levels

You can define a requirement to be a child requirement of the preceding requirement. Use the **Close Requirement** button to place the Close Requirement mark for the parent requirement after all its child requirements.

For example, to define *Req_2* as a child of *Req_1*, and *Req_3* and *Req_4* as children of *Req_2*, place the Close Requirement mark for *Req_2* after the definitions of its child requirements. Place the Close Requirement mark for *Req_1* at the very end.

When the document contains paragraphs, place each Close Requirement mark on its own line in the appropriate location. Note that the Close Requirement marks for *Req_1* and *Req_2* are inserted after *Req_3* and *Req_4*.

- [ Req_1
- [ Functional Requirement]
- [ alex_qc
- [ 3-High
- [ Rich text for Req_1
- [ Rich text for Req_1
- [ Description for Req_1

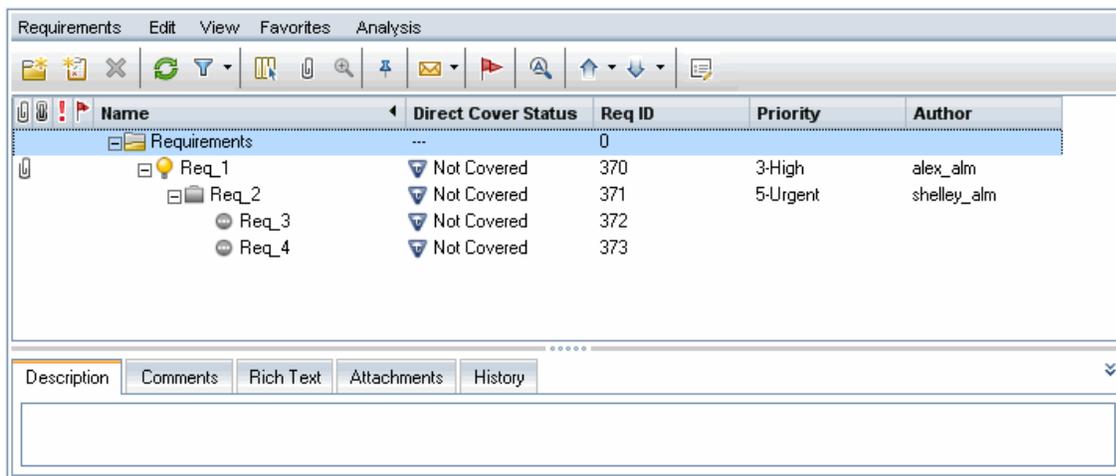
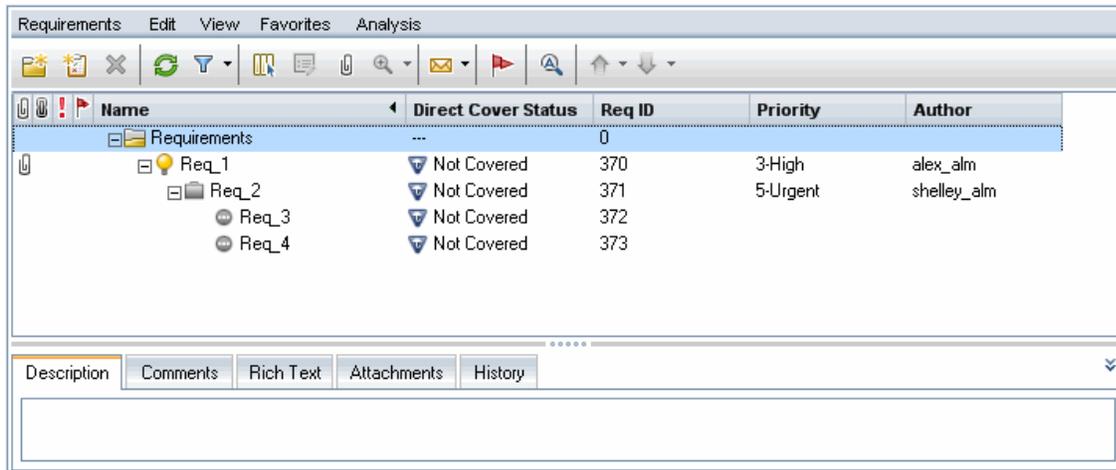
- [ Req_2
- [ Business Requirement]
- [ shelly_qc
- [ 5-Urgent
- [ Reviewer: michael_qc]
- [ Description for Req_2

- [ Req_3
- [ Req_4
- [ Req_4
- [ Req_4

When the data are provided as a table, add a column to the end of the table and place each Close Requirement mark in the appropriate location:

| Name | Requirement Type | Author | Priority | Rich Text | User-Defined Fields | Description | |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
|  Req_1 |  Functional Requirement] |  alex_qc |  3-High |  Rich text for Req_1 | |  Description for Req_1 | |
|  Req_2 |  Business Requirement] |  shelly_qc |  5-Urgent | |  Reviewer: michael_qc] |  Description for Req_2 |  |
|  Req_3 | | | | | | | |
|  Req_4 | | | | | | |  |

After you export the requirements to ALM, *Req_2* is displayed as a child of *Req_1*, and *Req_3* and *Req_4* are displayed as children of *Req_2*.



Formatting Test Plan Data

Before you export test plan data from Word to ALM, you can place data as paragraphs or tables. You then use the Microsoft Word Add-in toolbar buttons to mark test plan fields. You can format the fields so that when you export them to ALM, the subject folders are on the same hierarchical level, or different hierarchical levels, in the test plan tree.

This section includes:

- [Placing the Test Plan Data in the Document](#)17
- [Marking the Test Plan Fields](#)17
- [Example: Subject Folders on the Same Hierarchical Level](#)19
- [Example: Subject Folders on Different Hierarchical Levels](#)20

Placing the Test Plan Data in the Document

The Word document can contain test plan data as paragraphs or as tables.

When the data are provided as paragraphs, each field of the test plan must be on a separate line. For each subject folder, the name of the subject folder must appear first. The tests of that subject folder must appear under the name of the subject folder. The test steps of each test must appear under the test. The following example shows the data for two subject folders, each with one test containing one test step.

Subject_1
 Test_1
 Ready
 alex_qc
 Description for Test_1
 Step_1
 Description for Step_1
 Expected Results for Step_1

Subject_2
 Test_2
 Ready
 shelly_qc
 Description for Test_2
 Step_2
 Description for Step_2
 Expected Results for Step_2

When the document contains a table, the first column must be the name of the subject folder. The following example shows the data for two subject folders, listed in a table. In this example, *Subject_2* contains two tests and *Test_3* contains two test steps:

| Subject Name | Test Name | Test Status | Test Designer | Test Description | Test Step Name | Test Step Description | Test Step Expected Results |
|--------------|-----------|-------------|---------------|------------------------|----------------|------------------------|-----------------------------|
| Subject_1 | Test_1 | Ready | alex_qc | Description for Test_1 | Step_1 | Description for Step_1 | Expected Results for Step_1 |
| Subject_2 | Test_2 | Ready | shelly_qc | Description for Test_2 | Step_2 | Description for Step_2 | Expected Results for Step_2 |
| | Test_3 | Ready | shelly_qc | Description for Test_3 | Step_3 | Description for Step_3 | Expected Results for Step_3 |
| | | | | | Step_4 | Description for Step_4 | Expected Results for Step_4 |

Marking the Test Plan Fields

After placing your data as paragraphs or as tables, you mark your test plan fields. To mark a test plan field, highlight the text and click the appropriate button on the ALM Test Plan toolbar. An icon is added

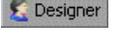
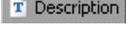
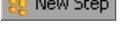
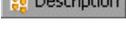
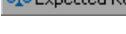
next to the marked text line. A bookmark is inserted into the document to allow the add-in to identify the marked text when it is exported to ALM.

When marking test plan fields, consider the following:

- You can export subject folders, tests and test steps. For a test you can export the test name, status, designer, and description. For a test step you can export the test step name, description, and expected results.
- To define a subfolder for an existing subject folder, place the new subfolder definition under the existing subject folder name.
- If a test step with the same name exists on the same level in the test plan tree, the test step is changed to contain the new information. If your document contains two test steps on the same hierarchical level with the same name, only the second test step is created.
- The data for each field should be on the same line as the icon that marks it. The only exceptions are the **Expected Results** field and the **Description** field. Data for these fields can extend to additional lines and can include returns and indents.
- Data intended for ALM fields that have selection lists must match the entries in those selection lists exactly.

To mark the test plan fields:

1. Open a Word document containing test plan text.
2. Highlight a text line or a table cell in your document, and click the appropriate button in the ALM Test Plan toolbar:

| Field | Toolbar Button | Icon |
|------------------------------|-----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| subject folder name |  New Folder |  |
| test name |  New Test |  |
| current status of the test |  Test Status |  |
| designer of the test |  Designer |  |
| description of the test |  Description |  |
| test step name |  New Step |  |
| description of the step |  Description |  |
| expected results of the step |  Expected Result |  |

3. Repeat for all test plan data. Any text in the document that is not marked is ignored.
4. Click the **Close Folder** button to close each subject folder with the Close Folder mark . The

location of this mark depends on whether the folders are on the same hierarchical level or on different hierarchical levels.

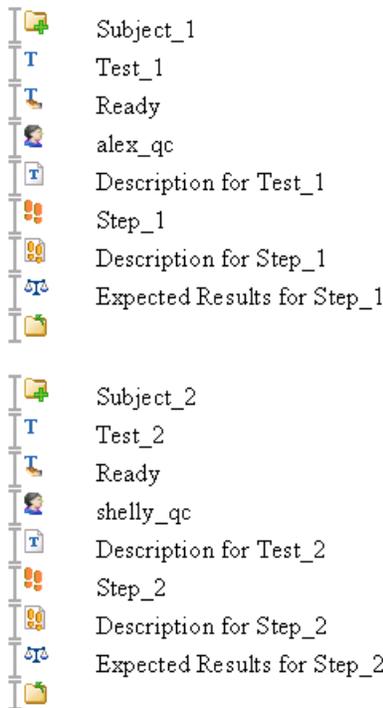
For more information, see ["Example: Subject Folders on the Same Hierarchical Level"](#) below or ["Example: Subject Folders on Different Hierarchical Levels"](#) on the next page.

5. To unmark one or more fields, use the undo buttons or remove the mark manually. For more information, see ["Deleting Formatting from the Document"](#) on page 22.
6. When all test plan data has been marked, export the test plan to ALM. For more information, see ["Exporting Data to ALM"](#) on page 24.

Example: Subject Folders on the Same Hierarchical Level

To define subject folders on the same hierarchical level in the test plan tree, use the **Close Folder** button to place the Close Folder mark directly after the data for each subject folder. This causes a subject folder to be placed on the same level as the preceding subject folder.

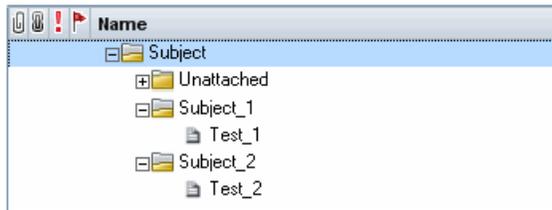
When the document contains paragraphs, insert a line after the last line of the subject folder data and mark it with the Close Folder mark:



When the document contains a table, add a column to the end of the table, and insert the Close Folder mark at the end of the data for each subject folder:

| Subject Name | Test Name | Test Status | Test Designer | Test Description | Test Step Name | Test Step Description | Test Step Expected Results | |
|--------------|-----------|-------------|---------------|------------------------|----------------|------------------------|-----------------------------|--|
| Subject_1 | Test_1 | Ready | alex_qc | Description for Test_1 | Step_1 | Description for Step_1 | Expected Results for Step_1 | |
| Subject_2 | Test_2 | Ready | shelly_qc | Description for Test_2 | Step_2 | Description for Step_2 | Expected Results for Step_2 | |

After you export the test plan to ALM, the subject folders in the test plan tree are displayed on the same hierarchical level.



Example: Subject Folders on Different Hierarchical Levels

You can define a subject folder to be a subfolder of the preceding subject folder. To do this, use the **Close Folder** button to place the Close Folder mark for the parent folder after all its subfolders.

For example, to define *Subject_2* as a subfolder of *Subject_1*, and *Subject_3* and *Subject_4* as subfolders of *Subject_2*, place the Close Folder mark for *Subject_2* after the definitions of its subfolders. Place the Close Folder mark for *Subject_1* at the very end.

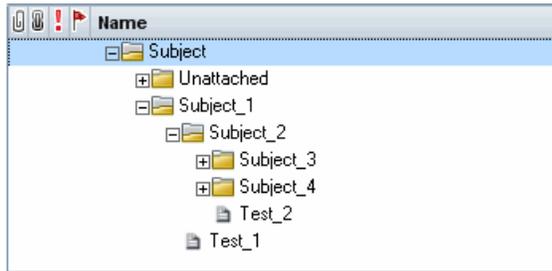
When the document contains paragraphs, place each Close Folder mark on its own line in the appropriate location. Note that the Close Folder marks for *Subject_1* and *Subject_2* are inserted after *Subject_3* and *Subject_4*.

- Subject_1
 - Test_1
 - Ready
 - alex_qc
 - Description for Test_1
 - Step_1
 - Description for Step_1
 - Expected Results for Step_1
- Subject_2
 - Test_2
 - Ready
 - shelly_qc
 - Description for Test_2
 - Step_2
 - Description for Step_2
 - Expected Results for Step_2
- Subject_3
- Subject_4
-
-

When the data are provided as a table, add a column to the end of the table and place each Close Folder mark in the appropriate location:

| Subject Name | Test Name | Test Status | Test Designer | Test Description | Test Step Name | Test Step Description | Test Step Expected Results | |
|--------------|-----------|-------------|---------------|------------------------|----------------|------------------------|-----------------------------|----------|
| Subject_1 | Test_1 | Ready | alex_qc | Description for Test_1 | Step_1 | Description for Step_1 | Expected Results for Step_1 | |
| Subject_2 | Test_2 | Ready | shelly_qc | Description for Test_2 | Step_2 | Description for Step_2 | Expected Results for Step_2 | |
| Subject_3 | | | | | | | | |
| Subject_4 | | | | | | | | |

After you export the requirements to ALM, *Subject_2* is displayed as a child of *Subject_1*, and *Subject_3* and *Subject_4* are displayed as children of *Subject_2*.



Deleting Formatting from the Document

To delete formatting from a document, you can use the undo buttons, or you can delete a mark manually.

Deleting Formatting Using the Undo Buttons

To delete the last mark you applied, or to delete all marks in the document, you can use the undo buttons to delete the bookmark and the icon for your most recent action or for all actions.

To delete formatting using the undo buttons:

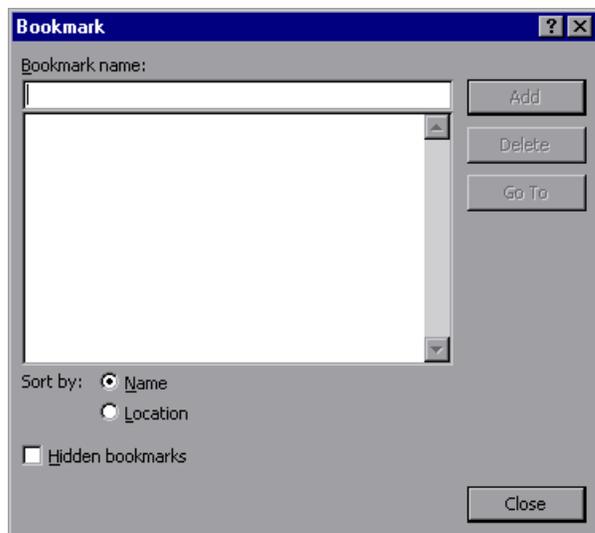
1. To delete you can:
 - a. Click the **Undo Last** button on the ALM Common toolbar to delete the last bookmark and icon you applied.
 - b. Click the **Undo All** button on the ALM Common toolbar to delete all bookmarks and icons in the document.
2. A message box opens. Click **Yes** to delete the bookmark, icon, and text in the document. Click **No** to delete the bookmark and icon, and leave the text in the document.

Deleting Formatting Manually

You can delete any bookmark and icon manually. Note that deleting the icon or the text does not delete the bookmark. If your document contains extra bookmarks, an error occurs when you attempt to export to ALM.

To delete formatting manually:

1. Manually delete the icon.
2. Choose **Insert > Bookmark**. The Bookmark dialog box opens.



Bookmark names contain the field name and an index number.

3. Select the bookmark you want to delete and click **Delete**.

Chapter 3: Exporting Data to ALM

After formatting your requirement or test plan data, you export the data to ALM.

When you export a new or existing requirement or test to ALM, it is created with the user name that you use to export it. For example, if you export a requirement to ALM with steve as the user name, the requirement’s history shows steve as the user that changed the requirement.

Note: You must have full create and modify permissions in ALM for requirements, the test plan tree, design steps, and subject folders.

This chapter includes:

- [Version Control Considerations](#)25
- [Exporting Data to ALM](#)25

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- [Exporting Data to ALM](#)25

Version Control Considerations

When you export data from Microsoft Word to a version control enabled project in ALM, consider the following:

- When you export a new requirement or test, it is created in ALM, with a checked in status.
- When you export an existing requirement or test that is checked in, it is automatically checked out during export. ALM adds a comment to the version history specifying that the requirement or test was updated by export from Word.
- When you export an existing requirement or test that is checked out by you, 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 *HPE Application Lifecycle Management User Guide*.

Exporting Data to ALM

You export data to ALM from your Microsoft Word document.

To export data to ALM:

1. Define the requirements or test plans in your document. For more information, see "[Formatting Requirement and Test Plan Data](#)" on page 6.
2. Make sure that the ALM Common toolbar is displayed. For more information on displaying the ALM Common toolbar, see "[The Microsoft Word Add-in Toolbars](#)" on page 7.
3. To exclude marked data in your document from being exported, highlight the text area and click the **Exclude Region** button. A line is drawn through the selected text.
4. Before you export data to ALM, you must download the ALM client. Navigate to the ALM login screen, and the appropriate files are downloaded to your machine. The download is done per server.
5. Click the **Export To HPE ALM** button.

The HPE ALM Export Wizard - Step 1 of 5 dialog box opens.

Type your ALM URL: `http://<ALM server name>[:port]/qcbn`.

For single sign-on users, enable **Add basic auth header mode**.

Note: **Add basic authenticationheader mode** is optional, and should only be enabled if you get an **invalid server response** message.

6. Click **Next**. The HPE ALM Export Wizard - Step 2 of 5 dialog box opens.
Enter your ALM user name and password.
7. Click **Next**. The HPE ALM Export Wizard - Step 3 of 5 dialog box opens.
Select an ALM domain and project.
8. Click **Export**. The HPE ALM Export Wizard - Step 4 of 5 dialog box opens.

9. If an error occurs while exporting the document,, the HPE ALM Export Wizard - Scan Error Report dialog box opens.
Review the errors. To save the errors as a text file, click the **Launch Notepad** button.
Click **Close** to exit the wizard. Correct the errors and start again at step 1.
10. If the data are exported successfully to ALM, the HPE ALM Export Wizard - Step 5 of 5 dialog box opens. Click **Finish**.
11. Refresh the view in ALM. Review the exported data and make the necessary additions and adjustments.

Send Us Feedback



Let us know how we can improve your experience with the Microsoft Word Add-in User Guide.

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