

Mercury Quality Center™

Microsoft Excel Add-in Guide
Version 9.0

Mercury Quality Center Microsoft Excel Add-in Guide, Version 9.0

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Welcome to This Guide

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

This add-in supports Microsoft Excel 2000, XP, 2003, and 2007 with Quality Center version 9.0.

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

Typographical Conventions

This guide uses the following typographical conventions:

UI Elements	This style indicates the names of interface elements on which you perform actions, file names or paths, and other items that require emphasis. For example, “Click the Save button.”
<i>Arguments</i>	This style indicates method, property, or function arguments and book titles. For example, “Refer to the <i>Mercury User’s Guide</i> .”
<Replace Value>	Angle brackets enclose a part of a file path or URL address that should be replaced with an actual value. For example, <MyProduct installation folder>\bin .
Example	This style is used for examples and text that is to be typed literally. For example, “Type Hello in the edit box.”
CTRL+C	This style indicates keyboard keys. For example, “Press ENTER .”
Function_Name	This style indicates method or function names. For example, “The wait_window statement has the following parameters:”
[]	Square brackets enclose optional arguments.
{ }	Curly brackets indicate that one of the enclosed values must be assigned to the current argument.
...	In a line of syntax, an ellipsis indicates that more items of the same format may be included. In a programming example, an ellipsis is used to indicate lines of a program that were intentionally omitted.
	A vertical bar indicates that one of the options separated by the bar should be selected.

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 describes:

- ▶ Installing the Microsoft Excel Add-in
- ▶ Additional Step after Upgrading Microsoft Excel

Installing the Microsoft Excel Add-in

This section describes how to install the Microsoft Excel Add-in on your client machine. Note that you must install Microsoft Excel on your client machine before you install the add-in.

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

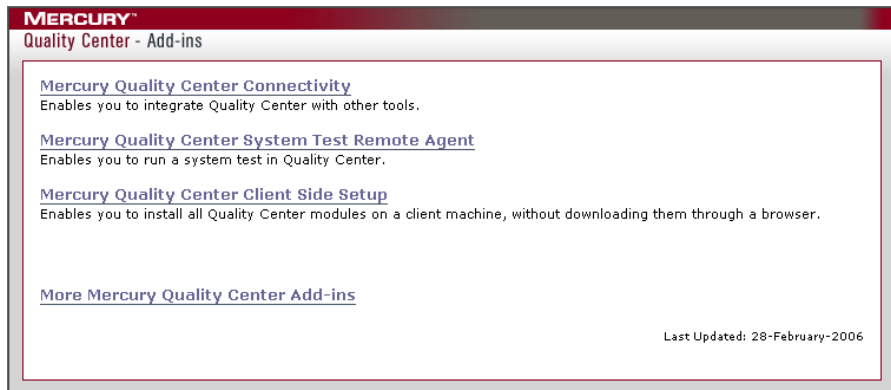
To install the Microsoft Excel Add-in:

- 1** Close Microsoft Excel.
- 2** Uninstall any previous versions of the Microsoft Excel Add-in. To uninstall, choose **Start > Settings > Control Panel > Add/Remove Programs** and follow the instructions on your screen.

- 3 Open your Web browser and type your Quality Center URL: [http://<Quality Center server name>\[:<port number>\]/qcbin](http://<Quality Center server name>[:<port number>]/qcbin). The Mercury Quality Center Options window opens.



- 4 Click the **Add-ins Page** link. The Mercury Quality Center Add-ins page opens.



- 5** Click the **More Mercury Quality Center Add-ins** link. The More Mercury Quality Center Add-ins page opens.
- 6** Under Microsoft Office Add-ins, click the **Microsoft Excel Add-in** link. The Microsoft Excel Add-in page opens.
- 7** Click the **Download Add-in** link. Follow the on-screen installation instructions.
- 8** Navigate back to the Mercury Quality Center Add-ins page and click the **Mercury Quality Center Connectivity** link. The Mercury Quality Center Connectivity Add-in page opens.
- 9** Click **Download Add-in** and install the Mercury Quality Center Connectivity Add-in on your Quality Center client machine.
- 10** Configure your Microsoft Excel security settings after you install the Excel Add-in. For more information on configuring Excel security settings, refer to the Microsoft Excel documentation.
- 11** 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” on page 3.
- 12** To access this guide, choose **Start > Programs > Quality Center 9.0 > 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.

For example, 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

2

Formatting Data

After you install the Microsoft Excel Add-in, you can format requirements, tests, or defects in Microsoft Excel and export them to Quality Center.

This chapter describes:

- ▶ About Formatting Data
- ▶ Formatting Requirements
- ▶ Formatting Tests
- ▶ Formatting Defects
- ▶ Formatting Guidelines

About Formatting Data

Before you can export requirements, tests, and defects from Excel to Quality Center, you must format your data. For requirements, you can format your data so that when you export the requirements to Quality Center, they are displayed on the same hierarchical level, or on different hierarchical levels in your requirements tree. For tests, you can format your data so that when you export the tests to Quality Center, they are displayed on the same hierarchical level, or on different hierarchical levels in your test plan tree.

Formatting Requirements

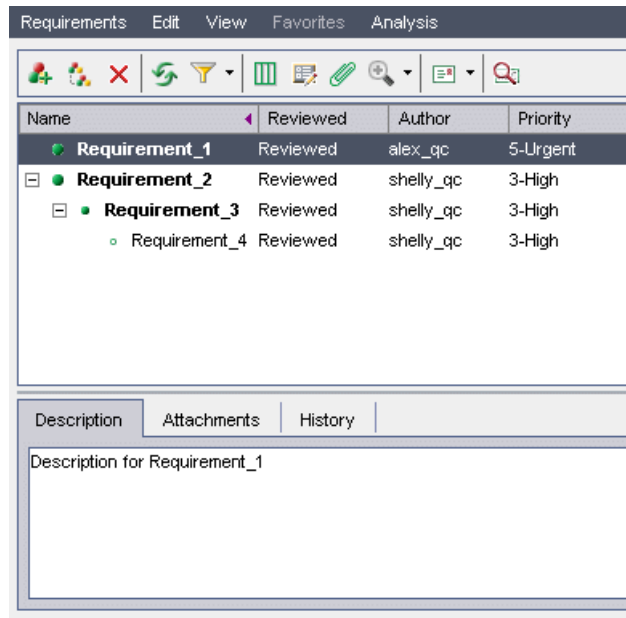
Before you export your requirements to the Quality Center Requirements module, you format the requirements in your worksheet. You can format the requirements to be displayed on the same hierarchical level, or on different hierarchical levels in your requirements tree.

The following example shows four requirements. Each requirement contains data columns for the **Name**, **Reviewed**, **Author**, **Priority**, and **Description** 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* and *Requirement_2* do not have entries in that column, indicating that the requirements are on the same hierarchical level. The path defined for *Requirement_3* indicates that the requirement is not of the same hierarchical level. It is a child of *Requirement_2*. The path defined for *Requirement_4* indicates that it is a child of *Requirement_3*.

	A	B	C	D	E	F
1	Name	Reviewed	Author	Priority	Description	Path
2	Requirement_1	Reviewed	alex_qc	5-Urgent	Description for Requirement_1	
3	Requirement_2	Reviewed	shelly_qc	3-High	Description for Requirement_2	
4	Requirement_3	Reviewed	shelly_qc	3-High	Description for Requirement_3	Requirement_2
5	Requirement_4	Reviewed	shelly_qc	3-High	Description for Requirement_4	Requirement_2\Requirement_3

After you export the requirements to Quality Center, *Requirement_1* and *Requirement_2* are displayed on the same hierarchical level. *Requirement_3* and *Requirement_4* are displayed on different hierarchical levels.



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 indicated in your Quality Center project. If you are defining requirements on different hierarchical levels, you must also specify the path. For additional formatting guidelines, see “Formatting Guidelines” on page 10.
- 3** Export the requirements to Quality Center. For more information, see Chapter 3, “Exporting Data to Quality Center.”

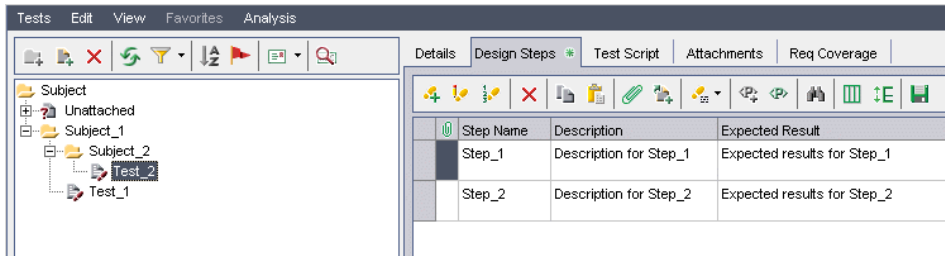
Formatting Tests

Before you export your tests to Quality Center's Test Plan module, you format the tests in your worksheet. You can format the tests to be displayed on the same hierarchical level, or different hierarchical levels in your test plan tree.

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 under *Subject_1*.

	A	B	C	D	E	F
1	Subject	Test Name	Description	Step Nam	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	Description for 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	Description for Test_2	Step_2	Description for Step_2	Expected results for Step_2
6						

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.



To format a test:

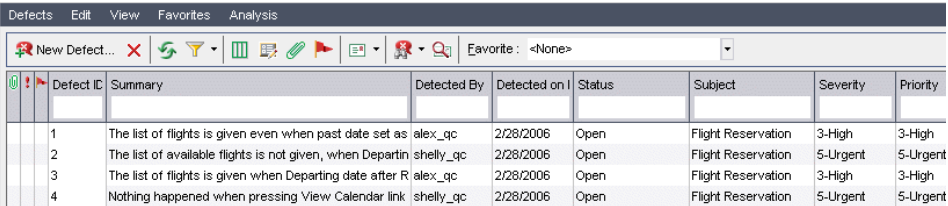
- 1 Open your Excel worksheet.
- 2 Define each test on a separate row. For each test, you must define all required fields as indicated in your Quality Center project. You must also specify the **Subject** folder in the test plan tree in which the test resides. For additional formatting guidelines, see "Formatting Guidelines" on page 10.
- 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 Quality Center's Defects module, you format the defects in your worksheet. 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	alex_qc	28/2/2006	Open	Flight Reservation	3-High	3-High
3	The list of available flights	shelly_qc	28/2/2006	Open	Flight Reservation	5-Urgent	5-Urgent
4	The list of flights is given	alex_qc	28/2/2006	Open	Flight Reservation	3-High	3-High
5	Nothing happened when	shelly_qc	28/2/2006	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. Below the menu bar is a toolbar with various icons for defect management. A search bar contains the text "Favorite: <None>". 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 even when past date set as	alex_qc	2/28/2006	Open	Flight Reservation	3-High	3-High
2	The list of available flights is not given, when Departin	shelly_qc	2/28/2006	Open	Flight Reservation	5-Urgent	5-Urgent
3	The list of flights is given when Departing date after R	alex_qc	2/28/2006	Open	Flight Reservation	3-High	3-High
4	Nothing happened when pressing View Calendar link	shelly_qc	2/28/2006	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.

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 indicated in your Quality Center project. For additional formatting guidelines, see "Formatting Guidelines" on page 10.
- 3 Export the defects to Quality Center. For more information, see Chapter 3, "Exporting Data to Quality Center."

Formatting Guidelines

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

- ▶ Each requirement, test, or defect must be entered in its own row.
- ▶ Each field data must be entered in its own column.
- ▶ Each requirement, test, or defect must contain all the required field data as indicated in your Quality Center project.
- ▶ 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 only accept one of the following entries: **5-Urgent**, **4-Very High**, **3-High**, **2-Medium**, or **1-Low**.
- ▶ Each requirement, test, or design step 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 will be created.
- ▶ When exporting design steps to Quality Center, make sure that you provide a step name for each step, and that you provide the names of the subject test folder and test for each step.

3

Exporting Data to Quality Center

After you define requirements, tests, or defects in your worksheets, you can export them to 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 **steve** as the user name, the defect's history shows **steve** as the person that changed the defect.

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.

To export to Quality Center:

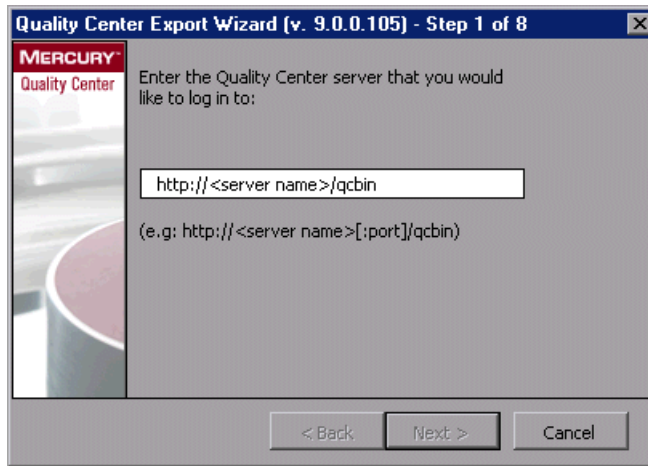
- 1** Define the requirements, tests, or defects in your worksheet. For more information, see Chapter 2, "Formatting Data."
- 2** Highlight the rows and columns that contain the data you want to export.

Note: Do not include column headings in your selection.

3 Open the Quality Center Export wizard:

- ▶ **Excel 2000, XP, and 2003.** Choose **Tools > Export to Quality Center**.
- ▶ **Excel 2007.** 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>/qcbn`). For example, `http://myserver/qcbn`.

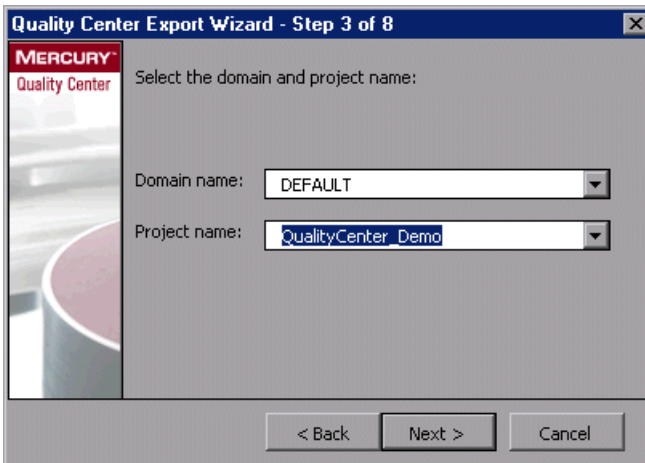
- 4 Click **Next**. The Quality Center Export Wizard - Step 2 of 8 dialog box opens.



The dialog box is titled "Quality Center Export Wizard - Step 2 of 8". It features the Mercury Quality Center logo on the left. The main area contains the text "Enter your user name and password:" followed by two input fields: "User Name:" and "User Password:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Type your user name and password.

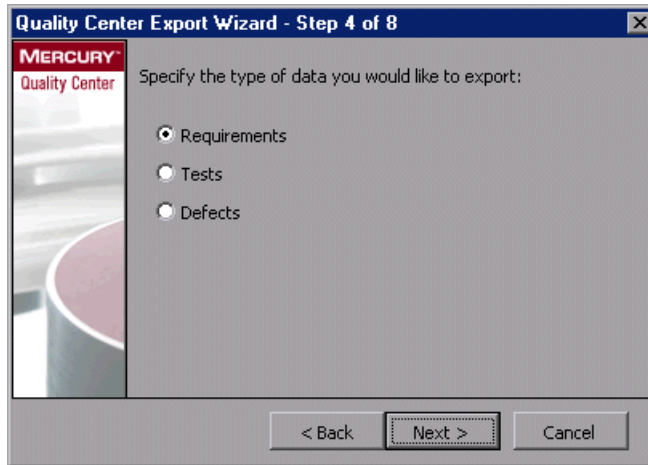
- 5 Click **Next**. The Quality Center Export Wizard - Step 3 of 8 dialog box opens.



The dialog box is titled "Quality Center Export Wizard - Step 3 of 8". It features the Mercury Quality Center logo on the left. The main area contains the text "Select the domain and project name:" followed by two dropdown menus: "Domain name:" (set to "DEFAULT") and "Project name:" (set to "QualityCenter_Demo"). 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 create a map for mapping Quality Center fields to Microsoft Excel columns, select one of the following options:

- ▶ **Select a map:** Select an existing map. If this option is unavailable, you may need to perform an additional step if you upgraded to a new version of Microsoft Excel. For more information, see “Additional Step after Upgrading Microsoft Excel” on page 3.
 - ▶ **Type a new map name:** Create a new map.
 - ▶ **Create a temporary map:** Create a temporary map that will not be saved.
- 8** Click **Next**. The Quality Center Export Wizard - Step 6 of 8 dialog box opens.



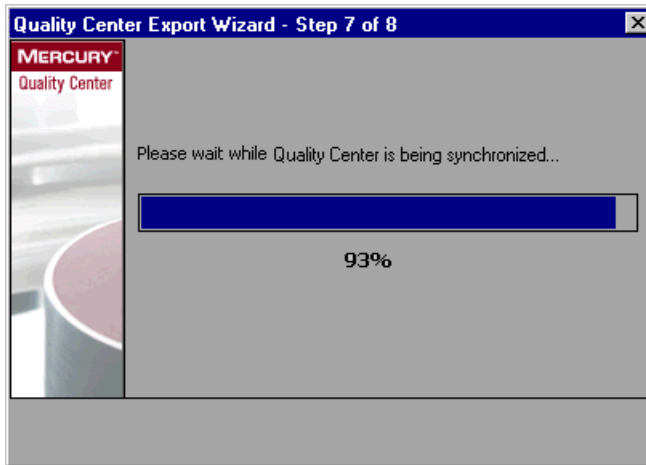
To map a Quality Center field to a corresponding Microsoft Excel column, choose a field name from the list on the left, and click the arrow button (>). The Map Field with Column dialog box opens. Type a corresponding Excel column letter and click **OK**. Note that a required field is displayed in red.

The following Quality Center fields cannot be mapped to Excel:

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

To remove a field mapping, choose a field name from the list on the right, and click the arrow button (<). Click the double arrow button (<<) to remove all fields.

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



- 10 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.

To exit the wizard, click **Cancel**. Correct the errors and start again at step 1 on page 11.

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

