

TestDirector

Microsoft Excel Add-in Guide
Version 8.0

TestDirector Microsoft Excel Add-in Guide, Version 8.0

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Welcome

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

This add-in supports Microsoft Excel 97, 2000, 2003, and XP with TestDirector 8.0 Standard and Enterprise editions.

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

Using This Guide

This guide contains two chapters:

Chapter 1 Installing and Configuring the Microsoft Excel Add-in

Describes how to install the Microsoft Excel Add-in and how to configure your Microsoft Excel security settings so that you can work with this add-in.

Chapter 2 Exporting Data to TestDirector

Describes how to export the Microsoft Excel worksheet to TestDirector.

Documentation Updates

Mercury Interactive is continuously updating its product documentation with new information. You can download the latest version of this document from the Customer Support Web site (<http://support.mercuryinteractive.com>).

To download updated documentation:

- 1** In the Customer Support Web site, click the **Documentation** link.
- 2** Under **Select Product Name**, select TestDirector.

Note that if TestDirector does not appear in the list, you must add it to your customer profile. Click **My Account** to update your profile.

- 3** Click **Retrieve**. The Documentation page opens and lists the documentation available for the current release and for previous releases. If a document was recently updated, **Updated** appears next to the document name.
- 4** Click a document link to download the documentation.

Typographical Conventions

This book uses the following typographical conventions:

- | | |
|-------------------|--|
| 1, 2, 3 | Bold numbers indicate steps in a procedure. |
| ► | Bullets indicate options and features. |
| > | The greater than sign separates menu levels (for example, File > Open). |
| Stone Sans | The Stone Sans font indicates names of interface elements in a procedure that you perform actions upon (for example, “Click the Run button.”). |
| Bold | Bold text indicates function names. |
| <i>Italics</i> | <i>Italic</i> text indicates variable names, or introduces a new term. |
| Arial | The Arial font is used for examples and statements that are to be typed in literally. |

1

Installing and Configuring the Microsoft Excel Add-in

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

This chapter describes:

- ▶ Installing the Microsoft Excel Add-in
- ▶ Configuring the Microsoft Excel Security Settings
- ▶ Upgrading Microsoft Excel

Installing the Microsoft Excel Add-in

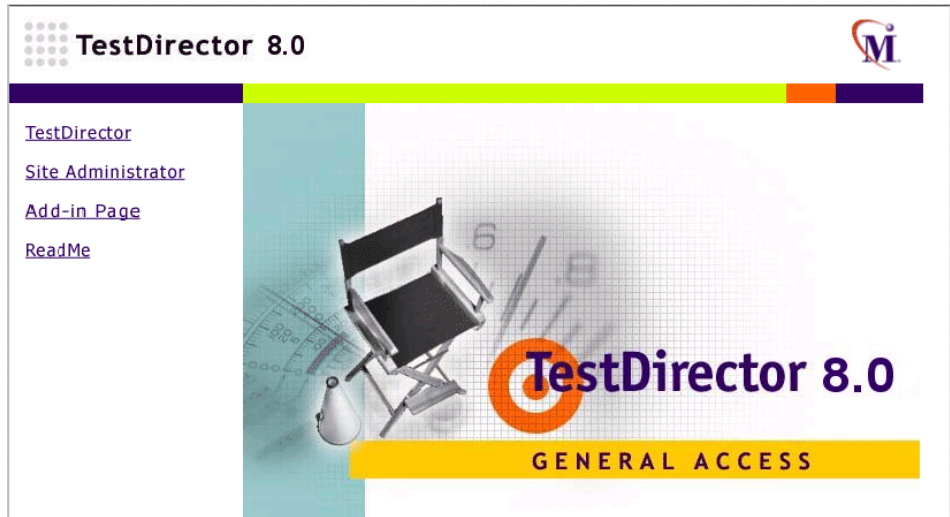
This section describes how to install the Microsoft Excel Add-in. Note that you must install Microsoft Excel on your client machine before you install the add-in.

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

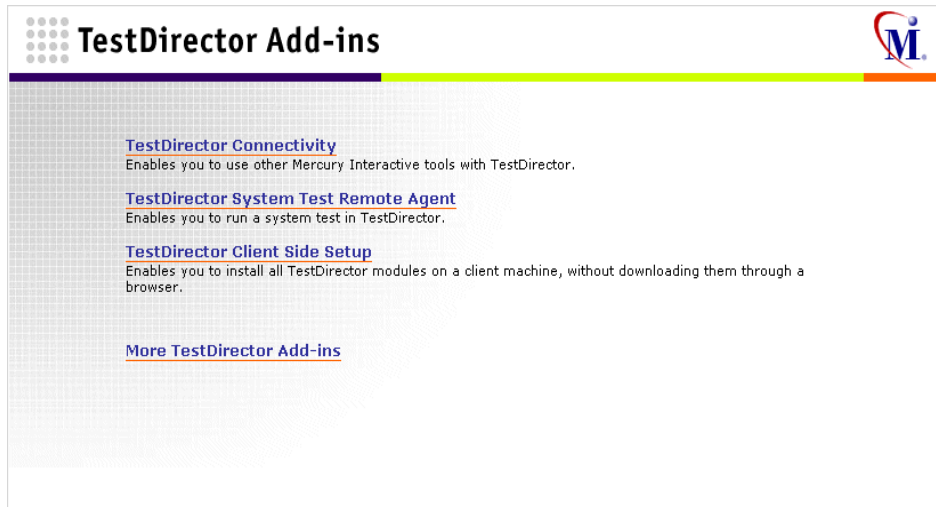
To install the Microsoft Excel Add-in:

- 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 TestDirector URL:
[http://\[TestDirector server name\]/\[virtual directory name\]/default.htm](http://[TestDirector server name]/[virtual directory name]/default.htm).
The TestDirector Options window opens.



- 4 Click the **Add-ins Page** link. The TestDirector Add-ins page opens.



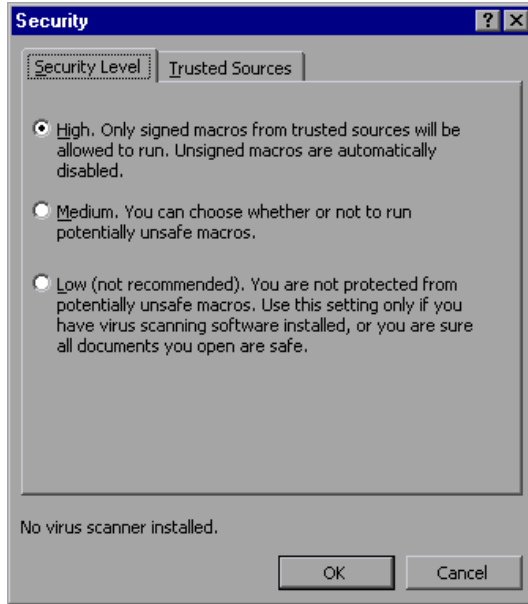
- 5** Click the **More TestDirector Add-ins** link. The More TestDirector Add-ins page opens.
- 6** Click the **Microsoft Excel** link. The Microsoft Excel Add-in page opens.
- 7** Click the **Download Add-in** link. Follow the on-screen installation instructions.
- 8** Navigate back to the TestDirector Add-ins page and click the **TestDirector Connectivity Add-in** link. The TestDirector Connectivity Add-in opens.
- 9** Click **Download Add-in** and install the Connectivity Add-in on your TestDirector client machine.
- 10** If you are using Office 97, you must open the TDExcelAddin.xla file in the Microsoft Office XLStart folder.
- 11** If you are using Microsoft Excel 2000, 2003, or XP, you must set your Microsoft Excel security settings after you install the Excel Add-in. For more information, see “Configuring the Microsoft Excel Security Settings”.

Configuring the Microsoft Excel Security Settings

If you are working with Microsoft Excel 2000, 2003, or XP, after you install the Microsoft Excel Add-in, you must also configure your Microsoft Excel security settings.

To configure the Microsoft Excel security settings:

- 1** In Microsoft Excel, choose **Tools > Macro > Security**. The Security dialog box opens.



- 2** In Microsoft Excel 2000, select one of the following options:
 - Select **Medium**. In the **Trusted Sources** tab, select **Trust all installed add-ins and templates**. Click **OK** to close the Security dialog box.
 - Select **Low**. In the **Trusted Sources** tab, clear **Trust all installed add-ins and templates**. Click **OK** to close the Security dialog box. Close and reopen Microsoft Excel. The macros dialog box opens. Click **Enable Macros** to enable the Microsoft Excel Add-in.
- 3** In Microsoft Excel 2003 or Microsoft Excel XP, to set the security settings:

Select **Medium**. In the **Trusted Sources** tab, clear **Trust all installed add-ins and templates**. Click **OK** to close the Security dialog box. Close and reopen Microsoft Excel. The macros dialog box opens. Click **Enable Macros** to enable the Microsoft Excel Add-in.

Upgrading Microsoft Excel

If you upgrade Microsoft Excel after working with this add-in, you must make the Microsoft Excel Add-in accessible to the new version of Microsoft Excel.

To use this add-in after upgrading Microsoft Excel:

- 1** In your file management application, navigate to:
<drive>:\Program Files\Microsoft Office\Office<old version>\XLStart\TDAddin
- 2** Copy the **TDAddin** folder to:
<drive>:\Program Files\Microsoft Office\Office<new version>\XLStart

You can now use the Microsoft Excel Add-in.

2

Exporting Data to TestDirector

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

This chapter describes:

- ▶ Defining Requirements
- ▶ Defining Tests
- ▶ Defining Defects
- ▶ Exporting to TestDirector

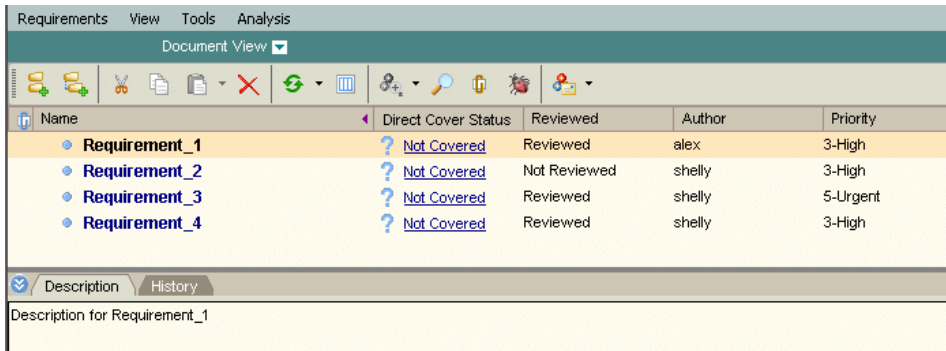
Defining Requirements

Before you export your requirements to TestDirector's Requirements module, you define the requirements in your worksheet. You can define the requirements to be displayed on the same hierarchical level, or different hierarchical levels in your requirements tree.

For example, the following requirements are defined on the same hierarchical level:

	A	B	C	D	E
1	Requirement	Reviewed	Author	Priority	Description
2	Requirement_1	Reviewed	alex	3-High	Description for Requirement_1
3	Requirement_2	Not Reviewed	shelly	3-High	Description for Requirement_2
4	Requirement_3	Reviewed	shelly	5-Urgent	Description for Requirement_3
5	Requirement_4	Reviewed	shelly	3-High	Description for Requirement_4
6					

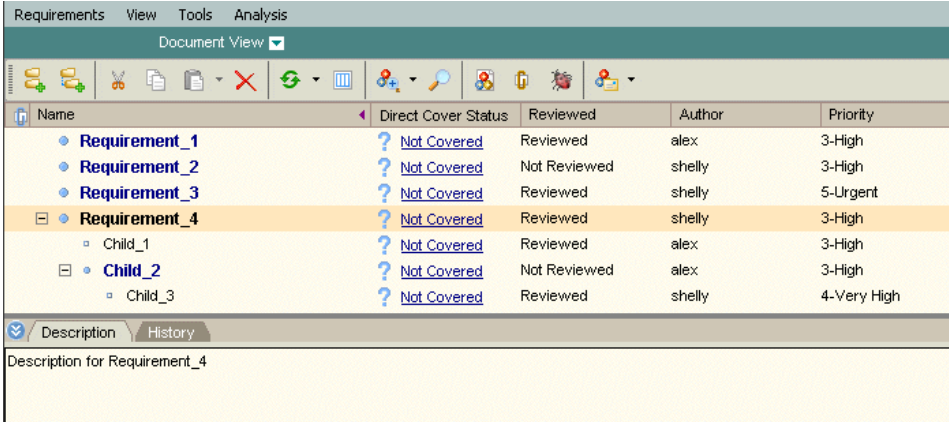
After you export the requirements to TestDirector, the requirements are displayed on the same hierarchical level.



You can also define requirements on different hierarchical levels in the requirements tree. For example, suppose you want to define Child_1 and Child_2 as children of Requirement_4, and Child_3 as a child of Child_2. To define requirements as children, you must define a path for each child as defined in the following example:

	A	B	C	D	E	F
1	Requirement	Path	Reviewed	Author	Priority	Description
2	Child_1	Requirement_4	Reviewed	alex	3-High	Description for Child_1
3	Child_2	Requirement_4	Not Reviewed	alex	3-High	Description for Child_2
4	Child_3	Requirement_4\Child_2	Reviewed	shelly	4-Very High	Description for Child_3
5						

After you export the requirements to TestDirector, the requirements are displayed on different hierarchical levels in the requirements tree.



Name	Direct Cover Status	Reviewed	Author	Priority
Requirement_1	? Not Covered	Reviewed	alex	3-High
Requirement_2	? Not Covered	Not Reviewed	shelly	3-High
Requirement_3	? Not Covered	Reviewed	shelly	5-Urgent
Requirement_4	? Not Covered	Reviewed	shelly	3-High
Child_1	? Not Covered	Reviewed	alex	3-High
Child_2	? Not Covered	Not Reviewed	alex	3-High
Child_3	? Not Covered	Reviewed	shelly	4-Very High

Description for Requirement_4

To define a requirement:

- 1 Open Microsoft Excel and open your worksheet.
- 2 Define each requirement on a separate row. For each requirement, you must define all required fields as indicated in your TestDirector project. If you are defining requirements on different hierarchical levels, you must also specify the path.
- 3 Export the requirements to TestDirector. For more information, see “Exporting to TestDirector,” on page 13.

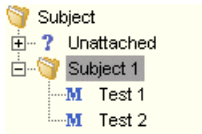
Defining Tests

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

For example, suppose you want to define **Test 1** and **Test 2** on the same hierarchical level in the **Subject 1** folder:

	A	B	C
1	Test Name	Subject	Test Type
2	Test 1	Subject 1	Manual
3	Test 2	Subject 1	Manual
4			

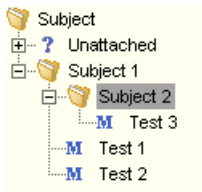
After you export the tests to TestDirector, the tests are displayed on the same hierarchical level in the test plan tree.



You can also define tests on different hierarchical levels in the test plan tree. For example, suppose you want to define **Test 3** under **Subject 2**, which is a subfolder under **Subject 1**.

	A	B	C
1	Test Name	Subject	Test Type
2	Test 1	Subject 1	Manual
3	Test 2	Subject 1	Manual
4	Test 3	Subject 1\Subject 2	Manual
5			

After you export the tests to TestDirector, **Test 3** is displayed on a different hierarchical level in the test plan tree.



To define a test:

- 1 Open Microsoft Excel and open your worksheet.
- 2 Define each test on a separate row. For each test, you must define all required fields as indicated in your TestDirector project. You must also specify the **Subject** folder in the test plan tree in which the test resides.
- 3 Export the tests to TestDirector. For more information, see “Exporting to TestDirector,” on page 13.

Defining Defects

Before you export your defects to TestDirector’s Defects module, you define the defects in your worksheet. For example, suppose you want to export the following information:

	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	alice_td	09/02/2001	Open	Flight Finder	3-High	3-High
3	The list of available flights	alice_td	09/02/2001	Reopen	Flight Finder	5-Urgent	5-Urger
4	The list of flights is given	alice_td	09/02/2001	Open	Flight Finder	3-High	3-High
5	Nothing happened when	alice_td	09/02/2001	Closed	Flight Finder	5-Urgent	5-Urger
6	The list of flights is appe	alice_td	09/02/2001	Open	Flight Finder	3-High	2-Medit
7	If error on submitting the	cecil_td	09/02/2001	Open	Registration	2-Medium	2-Medit
8	Incorrect time format use	alice_td	09/02/2001	Open	Flight Reserva	2-Medium	3-High
9	User profile is registered	cecil_td	09/02/2001	Rejected	Registration	4-Very Hig	
10	Email fields in Edit Profil	michael_td	09/02/2001	Reopen	Edit Profile	3-High	3-High
11	User profile is registered	cecil_td	09/02/2001	Open	Registration	3-High	2-Medit
12	User Profile registered wi	cecil_td	09/03/2001	Open	Registration	3-High	3-High
13	User profile is registered	cecil_td	09/03/2001	Open	Registration	3-High	3-High
14	Changes to Email field di	michael_td	09/03/2001	Open	Edit Profile	4-Very Hig	4-Very
15	All flight are shown when	alice_td	09/03/2001	Closed	Flight Finder	2-Medium	2-Medit
16	The itinerary is booked w	alice_td	09/06/2001	Closed	Book Flight	5-Urgent	4-Very
17	The itinerary is booked w	alice_td	09/06/2001	Open	Book Flight	3-High	2-Medit
18	The itinerary is booked w	alice_td	09/10/2001	Open	Book Flight	4-Very Hig	4-Very
19	The itinerary is booked w	alice_td	09/10/2001	Closed	Book Flight	5-Urgent	5-Urger
20	The itinerary is booked w	alice_td	09/10/2001	Closed	Book Flight	5-Urgent	5-Urger
21	Mercury Tours site crash	cecil_td	09/10/2001	Open	Welcome Pag	4-Very Hig	4-Very
22	Welcome page downloac	cecil_td	09/11/2001	Open	Welcome Pag	4-Very Hig	4-Very
23	User Name and Passwor	michael_td	09/11/2001	Open	Welcome Pag	1-Low	2-Medit

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

Defect ID	Summary	Detected By	Detected on	Status	Severity	Priority
1	The list of flights is given even when past date is	alice_td	9/2/2001	Open	3-High	3-High
2	The list of available flights is not given, when Dep	alice_td	9/2/2001	Reopen	5-Urgent	5-Urgent
3	The list of flights is given when Departing date of	alice_td	9/2/2001	Open	3-High	3-High
4	Nothing happened when pressing View Calendar	alice_td	9/2/2001	Closed	5-Urgent	5-Urgent
5	The list of flights is appear when illegal date is se	alice_td	9/2/2001	Open	3-High	2-Medium
6	If error on submitting the registration form occurs	cecil_td	9/2/2001	Open	2-Medium	2-Medium
7	Incorrect time format used in Mercury Tours site	alice_td	9/2/2001	Open	2-Medium	3-High
8	User profile is registered when Contact and Maili	cecil_td	9/2/2001	Rejected	4-Very High	
9	Email fields in Edit Profile form is empty, even if v	michael_td	9/2/2001	Reopen	3-High	3-High
10	User profile is registered when Contact and Maili	cecil_td	9/2/2001	Open	3-High	2-Medium
11	User Profile registered with illegal email field val	cecil_td	9/3/2001	Open	3-High	3-High
12	User profile is registered when special character	cecil_td	9/3/2001	Open	3-High	3-High
13	Changes to Email field during editing profile are n	michael_td	9/3/2001	Open	4-Very High	4-Very High
14	All flight are shown when time preference is set	alice_td	9/3/2001	Closed	2-Medium	2-Medium

To define a defect:

- 1** Open Microsoft Excel and open your worksheet.
- 2** Define each defect on a separate row. For each defect, you must define all required fields as indicated in your TestDirector project.
- 3** Export the defects to TestDirector. For more information, see “Exporting to TestDirector,” on page 13.

Exporting to TestDirector

After you define requirements, tests, or defects in your worksheets, you can export them to TestDirector.

Notes:

- ▶ Before you export requirements and tests to TestDirector, make sure that they have unique names. If a name is not unique, it will be overwritten. For example, suppose your worksheet contains two requirements in a particular hierarchy with the same name, only one will be created. Its value will be that of the second requirement. The same applies to the design steps of a test. If there are design steps without a name, or if more than one design step with the same name exists, then only a single design step will be created.
 - ▶ When you export a new or existing requirement, test, or defect to TestDirector, it is created with the user name that you use to export it. For example, if you export a defect to TestDirector with 'steve' as the user name, the defect's history shows 'steve' as the person that changed the defect.
 - ▶ You must have full create and modify permissions in TestDirector 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.
-

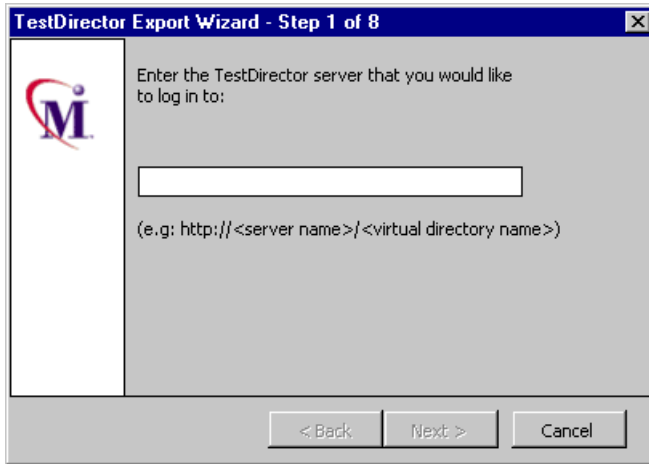
To export to TestDirector:

- 1** Define the requirements in your worksheet. For more information, see “Defining Requirements,” on page 7.

Define the tests in your worksheet. For more information, see “Defining Tests,” on page 10.

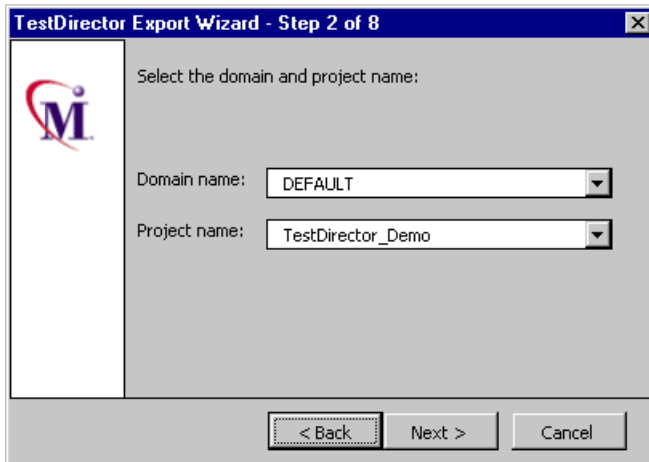
Define the defects in your worksheet. For more information, see “Defining Defects,” on page 11.
- 2** Highlight the columns without the column headings.

- 3 Choose **Tools > Export to TestDirector**. The TestDirector Export Wizard - Step 1 of 8 dialog box opens.



Type your TestDirector server and the virtual directory name (`http://<TestDirector server name>/<virtual directory name>`). For example, `http://myserver/tdbin`.

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



Select a domain and project name.

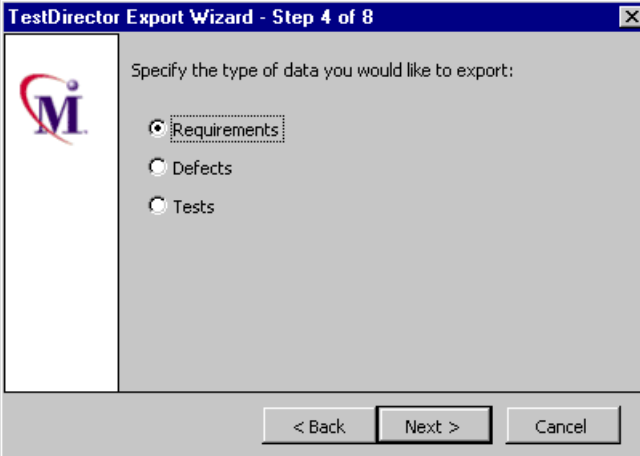
- 5 Click **Next**. The TestDirector Export Wizard - Step 3 of 8 dialog box opens.



The screenshot shows a dialog box titled "TestDirector Export Wizard - Step 3 of 8". On the left side, there is a logo consisting of a stylized "M" with a red swoosh underneath. To the right of the logo, the text "Enter your user name and password:" is displayed. Below this text are two input fields: "User Name:" with the text "admin" entered, and "User Password:" which is currently empty. At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

Type your user name and password.

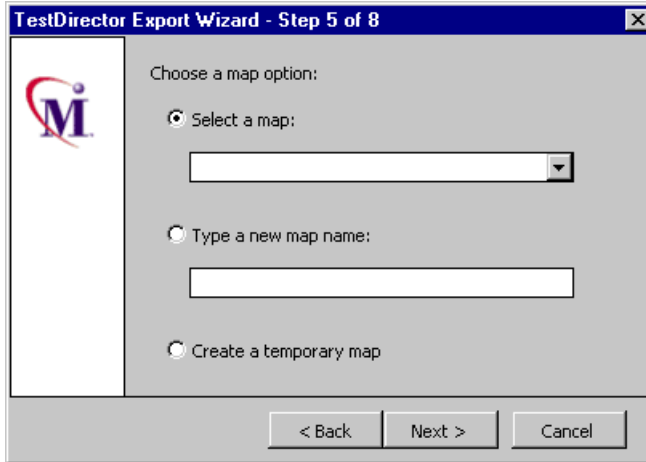
- 6 Click **Next**. The TestDirector Export Wizard - Step 4 of 8 dialog box opens.



The screenshot shows a dialog box titled "TestDirector Export Wizard - Step 4 of 8". On the left side, there is a logo consisting of a stylized "M" with a red swoosh underneath. To the right of the logo, the text "Specify the type of data you would like to export:" is displayed. Below this text are three radio button options: "Requirements" (which is selected), "Defects", and "Tests". At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

Select a data type.

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

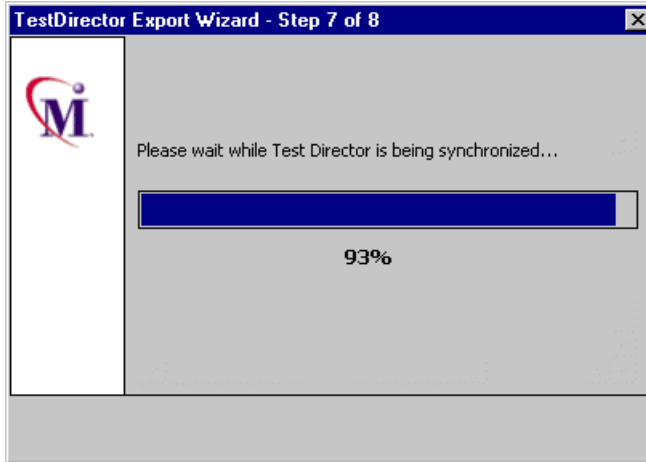


To create a map for mapping TestDirector fields to Microsoft Excel columns, you can:

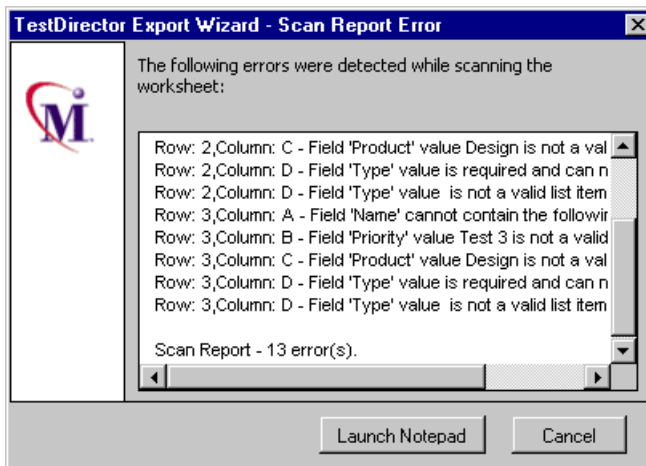
- Select an existing map.
- Create a new map.
- Create a temporary map that will not be saved.

Note: If you upgraded to a newer version of Microsoft Excel and your existing maps are unavailable, you can make them accessible again. For more information, see “Upgrading Microsoft Excel,” on page 5.

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



- 10 If an error occurs while exporting the worksheet, the TestDirector 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 13.

- 11 If you have successfully exported your worksheet to TestDirector, the TestDirector Export Wizard - Step 8 of 8 dialog box opens.



Click **Finish**.

