

# HP ALM: Filter Conditions, Find, Replace, Flags, History & Send Mail

There are plenty of common functionalities in ALM that are available across modules. Now Let us go through how to make use of those common functionalities in this section.

In this tutorial we will learn

- [How to use Filter](#)
- [How to use Find](#)
- [How to Replace](#)
- [How to use Flags](#)
- [All About History Tab](#)
- [How to send Email](#)
- [How to use Column chooser](#)
- [How to Set Defaults](#)
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Lets look into them one by one -

## How to use Filter

Filter dialog ALM users to perform a filter operation based on the defined criteria. This Option is available in following modules.

- Requirements
- Test Plan
- Test Lab
- Defects.

Let us perform a filter operation in defects module.

**Step 1)** Toperform filter operation,

1. First check if there is any preexisting filter. If the status is 'NO Filter Defined' then the user has NOT currently seeing filtered data.

## 2. Click on 'Filter Button'

Actual Fix Time	Defect ID	Description	Detected By	Detected in...
1	1	Mandatory fields check are NOT happeni..	admin	
	2	Logout test failed. Logging out not happo..	jule	Cycle 1
	3	Negative amount in Deposit Module. Use...	glenn	Cycle 1
	4	Deposit Module - Description field check ..	admin	Cycle 1
	5	Exception on clicking 'cancel' button in co..	tom	Cycle 1
	6	Able to Delete an Active Account	jule	Cycle 1
	7	Delete Account - Exception thrown even i..	glenn	Cycle 1
	8	Delete Invalid Account - throws NON Res...	jule	Cycle 1
	9	Accepts Invalid Amount in Withdrawal mo...	glenn	Cycle 1
	10	Add Cusonter - Mandatory Field Check L...	admin	Cycle 1
	11	Add Cusonter - Mandatory Field Check L...	tom	Cycle 1
	12	Invalid Error Message on adding Alphanu...	jule	Cycle 1
	13	Exception on clicking 'Submit' button in A...	glenn	Cycle 1
	14	Invalid Error Message when user submits...	jule	Cycle 1

(./images/hpalm/071114\_1017\_Gettingused1.png).

**Step 2)** The Filter dialog opens. Now Let us do a filter based on 'Severity'. Click on the 'Severity' field button as shown below.

**Filter defects**

No Filter Defined

Filter | Cross Filter | View Order | Group

Field Name	Filter Condition
Detected in Release	
Detected in Version	
Detected on Date	
Estimated Fix Time	
Modified	
Planned Closing Version	
Priority	
Project	
Reproducible	
<b>Severity</b>	
Status	
Subject	
Summary	
Target Cycle	
Target Release	

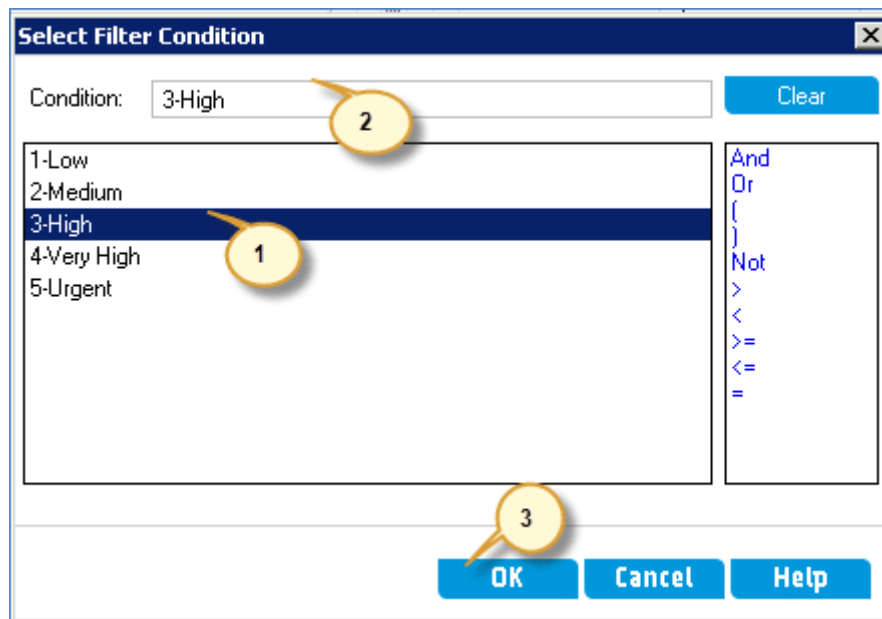
OK Cancel Help

(./images/hpalm/071114\_1017\_Gettingused2.png).

**Step 3)** Upon clicking on the button, the 'Select Filter Condition' dialog opens up.



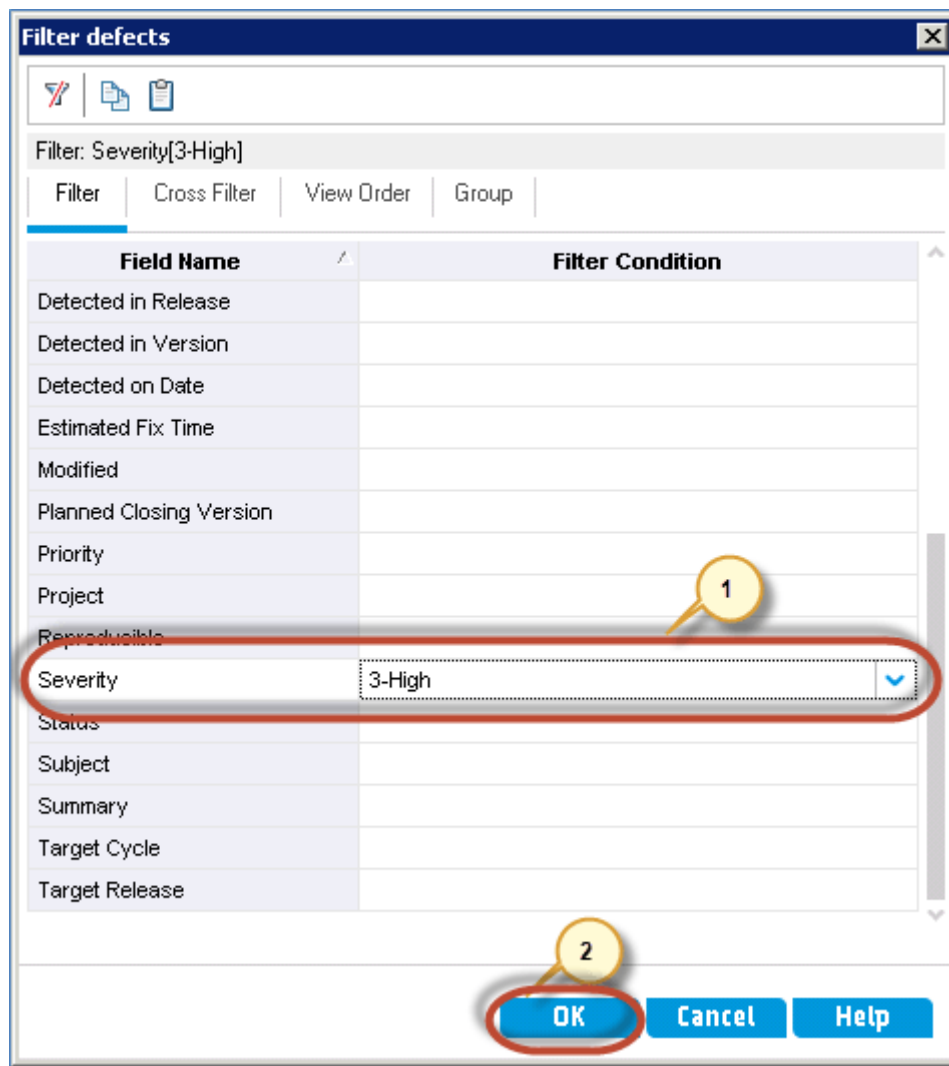
1. Select the condition based on which one has to filter.
2. The condition would be displayed in the condition field.
3. Click 'OK'



[./images/hpalm/071114\\_1017\\_Gettingused3.png](#)

**Step 4)** The Filter dialog is displayed back to the user

1. With the selected 'Filter Condition' as shown below.
2. Click 'OK'.



(./images/hpalm/071114\_1017\_Gettingused4.png).

**Step 5)** The Defect (/defect-management-process.html) screen is displayed to the user

1. With the filtered data.
2. The Filter condition that is applied on the data.

Detected in...	Detected on...	Estimated Fix...	Modified	Planned...	Priority	Project	Reproducible	Severity	Status	Subject
R1	3/4/2017		6/24/2014 11:01...					3-High	Rejected	
R1	2/3/2017		6/24/2014 11:02...					3-High	Fixed	
R1	1/25/2017		6/24/2014 11:03...					3-High	Open	

(./images/hpalm/071114\_1017\_Gettingused5.png).

## How to use Find

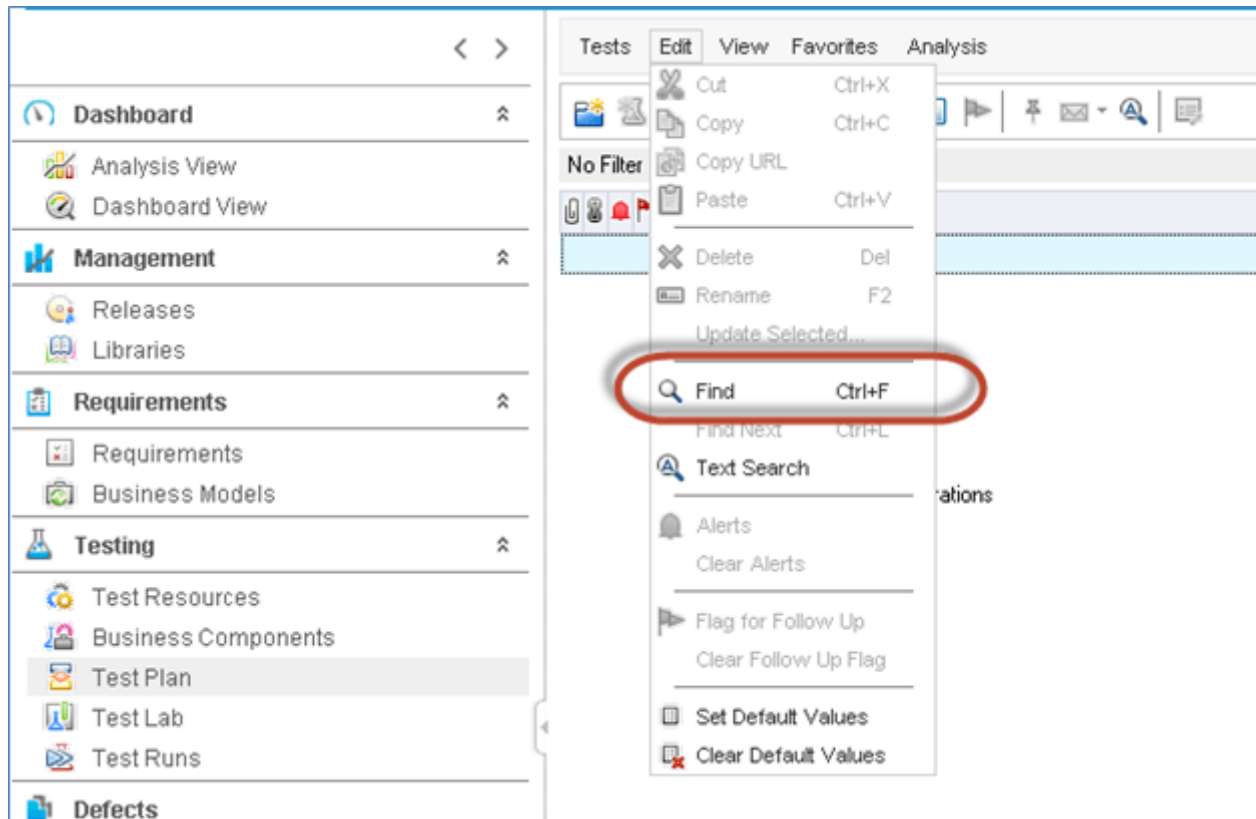
This Find functionality enables ALM users to search for a particular record in a tree or grid based on the value of a particular field, folder or a subfolder.

This feature is available in the following modules.



- Requirements
- Test Plan
- Test Resources
- Test Lab
- Defects.

**Step 1)** The Find functionality can be accessed by either pressing the keystroke 'ctrl+F' or by accessing 'Find' Functionality directly from 'Edit' Menu. For Demo purpose let us perform 'Search' on 'Test Plan' Module.



(./images/hpalm/071114\_1017\_Gettingused6.png).

**Step 2)** The Find Dialog opens up for the user as shown below.

1. It shows the Folder and Field against which the search has to be made.
2. The value that needs to be found.
3. The search area has to be selected. It can be a folder name or test name.
4. The search criteria can be specified.
  1. **Exact Match** – Only the words that match the entered string would be displayed
  2. **Case Sensitive** – The entered search string would be searched for case sensitiveness. Let us say, the entered string is 'Account'. ALM will display the results if and only if the grid values matches the exact case. Only the occurrences of 'Account' would be displayed and NOT 'account' or 'aCcount'.

3. **Use Wildcard** – The entered string would be matched against the wild card criteria specified by the user. Wild Card characters are helpful if the user is NOT aware of the exact search string. The only supported wild character is '\*'. For Example, if we want to see the occurrences of 'Accounts', we can use wild characters to match the target by searching the string as \*acc\*.

5. Click 'Find'

The 'Find' dialog box contains the following elements:

- Find in Folder:** A text box containing 'Subject' (Callout 1).
- Find in Field:** A text box containing 'Test Name' (Callout 1).
- Value to Find:** A text box containing 'deposit' (Callout 2).
- Search for:** Radio buttons for 'Folders' and 'Tests' (Callout 3, with 'Tests' selected).
- Match Criteria:** A section containing four checkboxes: 'Exact Match', 'Use Wildcard', 'Case Sensitive', and 'Use Wildcard' (Callout 4).
- Buttons:** 'Find', 'Close', and 'Help' buttons at the bottom (Callout 5 points to the 'Find' button).

(./images/hpalm/071114\_1017\_Gettingused7.png).

**Step 3)** The search results would be displayed as shown below.

Search Results in: < Subject > for < deposit >

ID	Test Name
31	Functional\Manual\Bank Operations\01 - Deposit
32	Functional\Manual\Bank Operations\02 - Deposit Negative Testing

Buttons: Go To, Close

(./images/hpalm/071114\_1017\_Gettingused8.png).

# How to Replace

The replace functionality in ALM enables users to find and replace specific field values in a tree or grid. Users have an option of replacing a field value for a selected record or replacing for all records in the tree or grid.

This feature is available in the following modules.

- Requirements
- Test Runs
- Defects

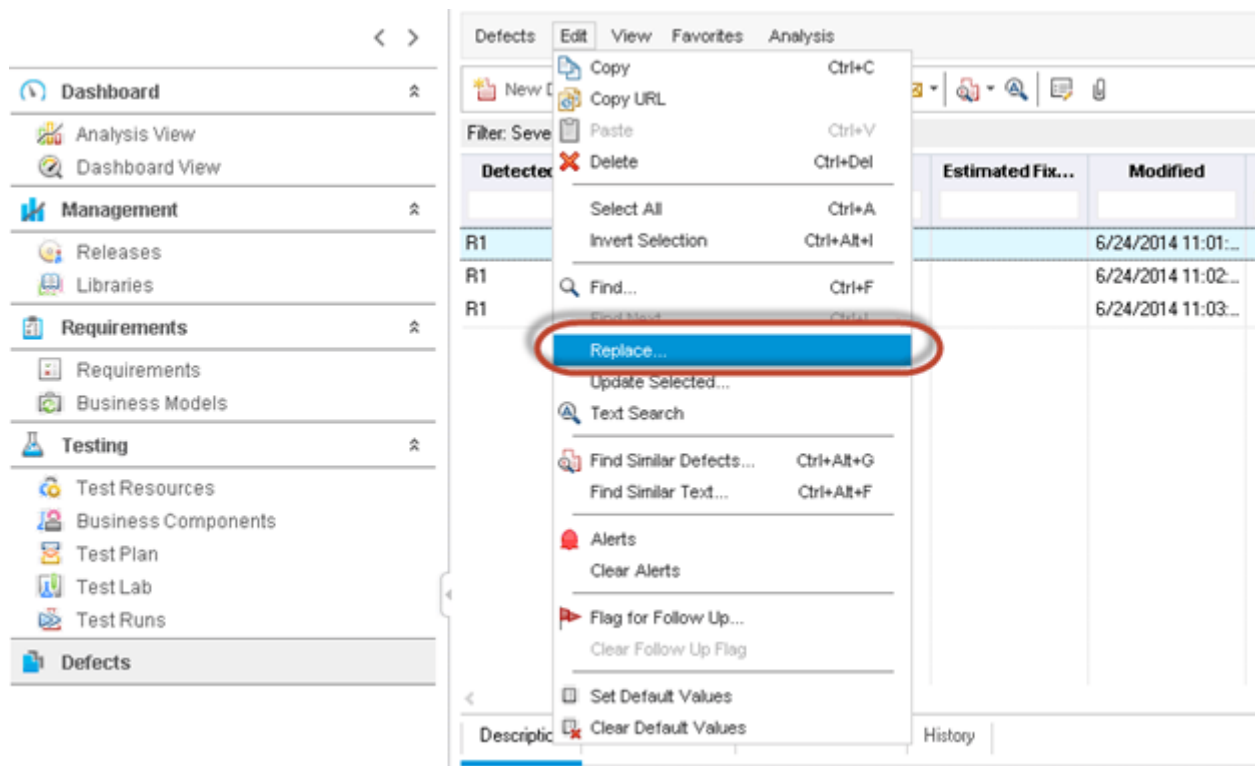
For Demo purpose, let us search and replace a string in 'Defects' Module.

**Step 1)** Let us say we want to replace occurrences of the word 'Account' with 'A/c'. There are 3 instances where the text 'Account' appears in defect description field as shown below.

	Assigned To	Comments	Defect ID	Description	Detected By
			1	Mandatory fields check are NOT happening as expected in Add Cu.	admin
	tom		2	Logout test failed. 'Logging out not happening as expected.	julie
	julie		3	Negative amount in Deposit Module. User is able to enter negative...	glenn
	glenn		4	Deposit Module - Description field check - accepts Alpha numeric c...	admin
	admin		5	Exception on clicking 'cancel' button in confirmation dialog of depos...	tom
	tom		6	Able to Delete an Active <u>Account</u>	julie
	julie		7	Delete <u>Account</u> - Exception thrown even if account balance is ZERO	glenn
	glenn		8	Delete Invalid <u>Account</u> - throws NON Readable text messages	julie
	admin		9	Accepts Invalid Amount in Withdrawal module	glenn

(./images/hpalm/071114\_1017\_Gettingused9.png).

**Step 2)** The Replace Functionality can be accessed by navigating to 'Edit' Menu.



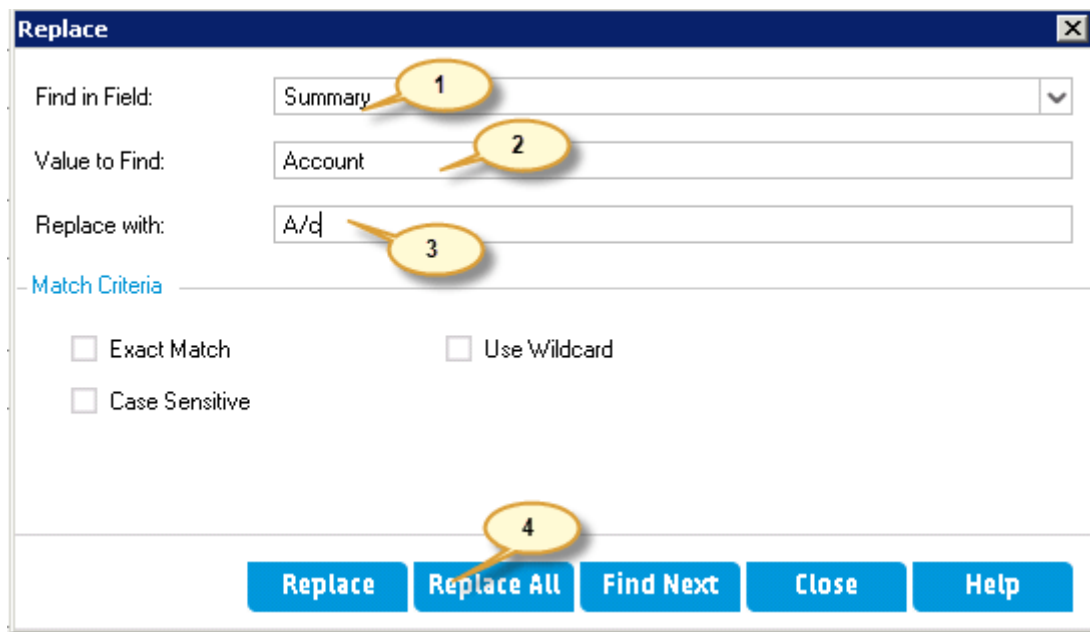
(./images/hpalm/071114\_1017\_Gettingused10.png).

**Step 3)** The Replace Dialog box is displayed to the user.

1. Enter the 'Search' Field Name
2. Enter the Value that needs to be found.
3. Enter the value that has to be replaced with the search string value.
4. Click 'Replace All' to replace all the occurrences or Replace for just replacing a specific occurrence.

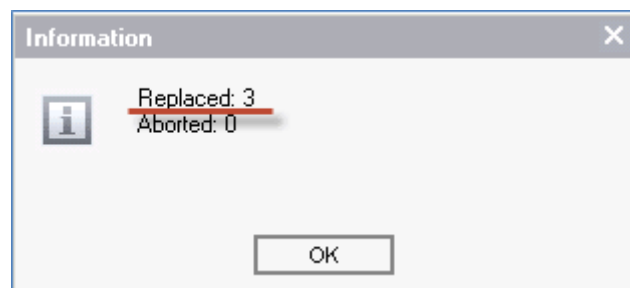
**Note:** User can replace a specific occurrence by clicking on 'Find Next' to focus on the appropriate record which can then be replaced by clicking on 'replace' button.





(/images/hpalm/071114\_1017\_Gettingused11.png).

**Step 4)** The Replace results are shown to the user with the number of occurrences it has replaced and the number of times it has skipped the search string in the entire module.



(/images/hpalm/071114\_1017\_Gettingused12.png).

**Step 5)** User can now navigate to the defects module and we can find that all the occurrences of 'Account' are replaced by 'A/c'.

Estimate...	Modified	Planned...	Priority	Project	Reproducible	Severity	Status	Subject	Summary
	6/24/2014 11:05...					1Low	Closed		Exception on clicking 'cancel' button in confirmation dialog of...
	6/30/2014 12:11...					2Medium	Open		Able to Delete an Active A/c
	6/30/2014 12:07...					3High	Rejected		Delete A/c - Exception thrown even if A/c balance is ZERO
	6/30/2014 12:11...					1Low	Reopen		Delete Invalid A/c - throws NON Readable test messages
	6/24/2014 11:05...					5Urgent	Fixed		Accepts Invalid Amount in Withdrawal module
	6/24/2014 11:05...					1Low	Closed		Add Customer - Mandatory Field Check failed for DOB Field
	6/24/2014 11:05...					2Medium	Open		Add Customer - Mandatory Field Check failed for PinCode Field

(/images/hpalm/071114\_1017\_Gettingused13.png).

## How to use Flags

The Flags Functionality in ALM helps users to do a follow up by adding a follow up flag against a specific work item.

This feature is available in the following modules.

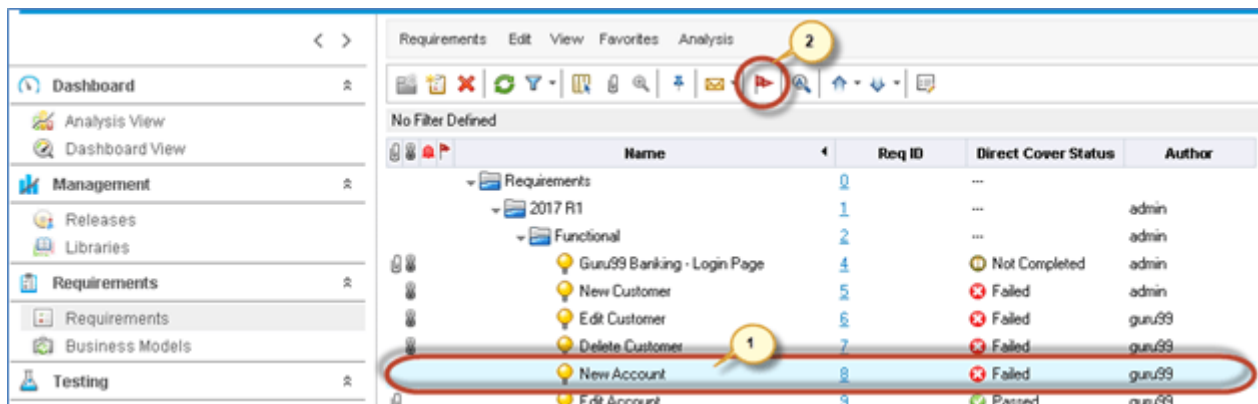


- Requirements
- Test Plan
- Test Lab
- Defects

For Demo purposes, let us understand the 'Flag for Follow up' Functionality by flagging a work item in requirements module.

**Step 1)** The Flag functionality can be accessed by

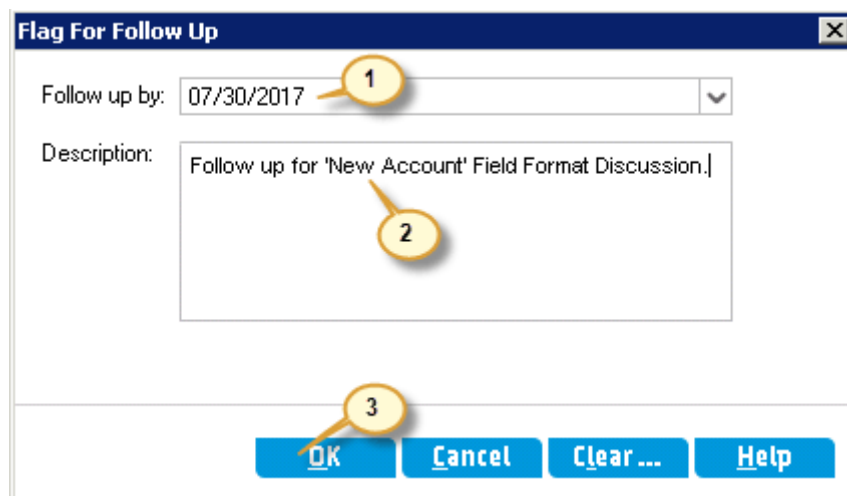
1. Selecting the requirement against which the flag for follow up should be done.
2. Click on 'Flag' Icon.



(/images/hpalm/071114\_1017\_Gettingused14.png).

**Step 2)** Upon clicking on the "Flag" icon, the "Flag for Follow up" Dialog is displayed to the user.

1. Enter the Date on which the follow up should be done.
2. Enter a brief description on why it has to be followed up.
3. Click 'OK'



(/images/hpalm/071114\_1017\_Gettingused15.png).

**Step 3)** The Flag for Follow up is created and user will be able to see the flag icon against that work item as shown below.

No Filter Defined

	Name	Req ID	Direct Cover Status	Author
▼	Requirements	<a href="#">0</a>	---	
▼	2017 R1	<a href="#">1</a>	---	admin
▼	Functional	<a href="#">2</a>	---	admin
	Guru99 Banking - Login Page	<a href="#">4</a>	ⓘ Not Completed	admin
	New Customer	<a href="#">5</a>	✖ Failed	admin
	Edit Customer	<a href="#">6</a>	✖ Failed	guru99
	Delete Customer	<a href="#">7</a>	✖ Failed	guru99
	New Account	<a href="#">8</a>	✖ Failed	guru99

(/images/hpalm/071114\_1017\_Gettingused16.png).

**Step 4)** When the follow up date matches with the current date, the flag for follow up would be displayed in RED color as highlighted below.

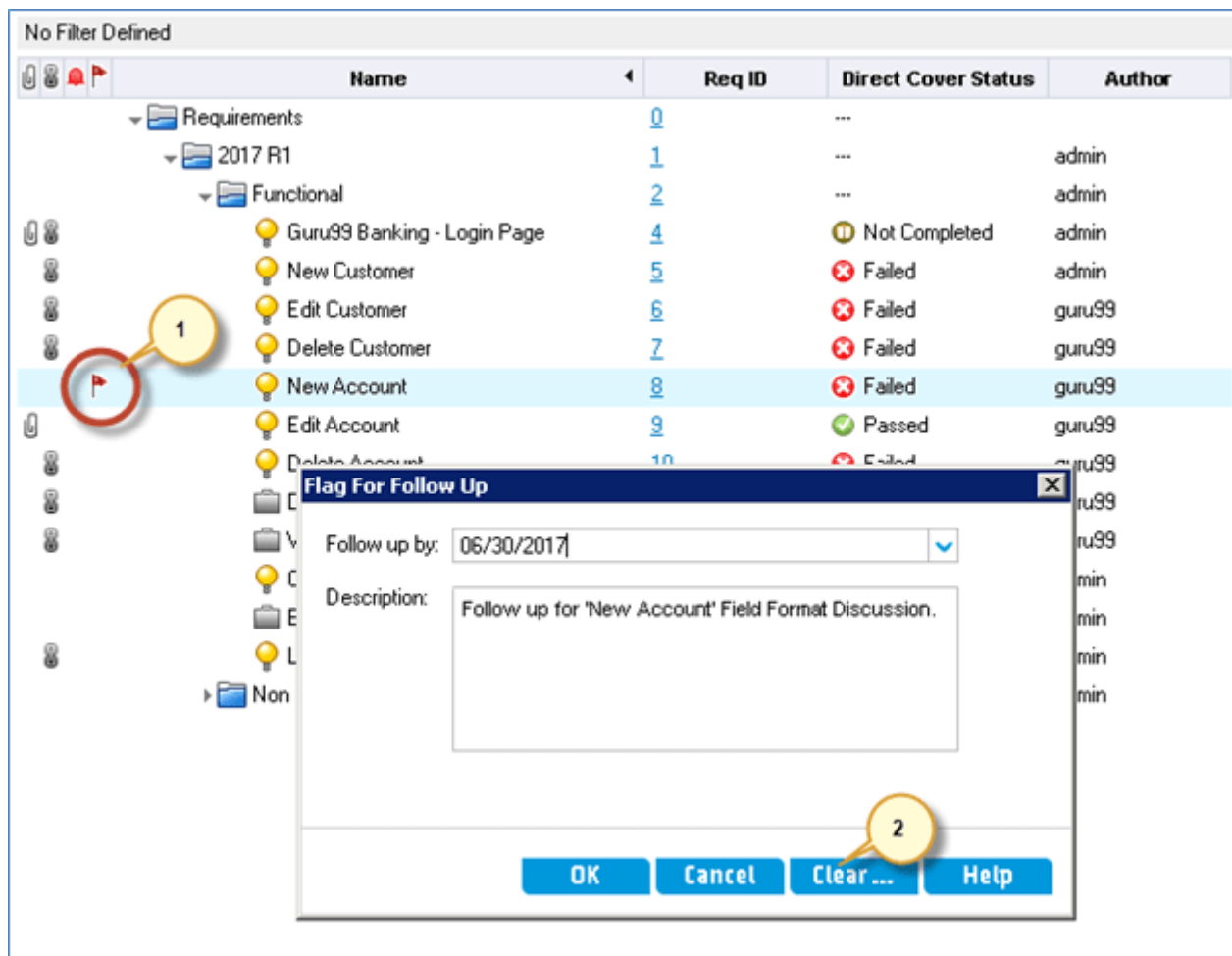
No Filter Defined

	Name	Req ID	Direct Cover Status	Author
▼	Requirements	<a href="#">0</a>	---	
▼	2017 R1	<a href="#">1</a>	---	admin
▼	Functional	<a href="#">2</a>	---	admin
	Guru99 Banking - Login Page	<a href="#">4</a>	ⓘ Not Completed	admin
	New Customer	<a href="#">5</a>	✖ Failed	admin
	Edit Customer	<a href="#">6</a>	✖ Failed	guru99
	Delete Customer	<a href="#">7</a>	✖ Failed	guru99
	New Account	<a href="#">8</a>	✖ Failed	guru99
	Edit Account	<a href="#">9</a>	✔ Passed	guru99
	Delete Account	<a href="#">10</a>	✖ Failed	guru99

(/images/hpalm/071114\_1017\_Gettingused17.png).

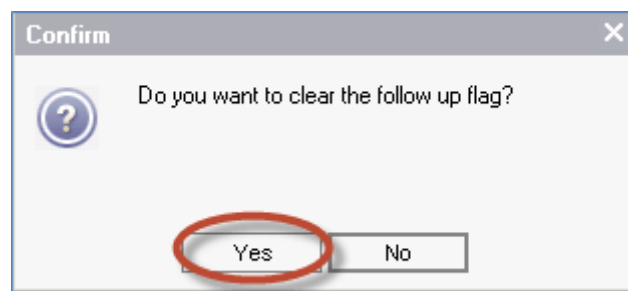
**Step 5)** User can also clear the flag once the follow up is complete. To perform the same,

1. Click on the Follow up icon against the work item
2. The Flag for follow up dialog opens. User can click on 'Clear' Button as shown below.



(/images/hpalm/071114\_1017\_Gettingused18.png).

**Step 6)** Upon clicking on 'Clear' button, the confirmation dialog is displayed to the user. User can click 'Yes' to clear the flag for follow up against that work item.



(/images/hpalm/071114\_1017\_Gettingused19.png).

**Step 7)** Upon clicking 'Yes' from the confirmation dialog, the flag for follow up is cleared against that requirement.

No Filter Defined				
	Name	Req ID	Direct Cover Status	Author
▼	Requirements	0	---	
▼	2017 R1	1	---	admin
▼	Functional	2	---	admin
🔍	🔍 Guru99 Banking - Login Page	4	🟡 Not Completed	admin
🔍	🔍 New Customer	5	❌ Failed	admin
🔍	🔍 Edit Customer	6	❌ Failed	guru99
🔍	🔍 Delete Customer	7	❌ Failed	guru99
🔍	🔍 New Account	8	❌ Failed	guru99
🔍	🔍 Edit Account	9	✅ Passed	guru99
🔍	🔍 Delete Account	10	❌ Failed	guru99

(/images/hpalm/071114\_1017\_Gettingused20.png).

## All About History Tab

This History tab enables ALM users to view all the changes made to the selected work item. The History includes date, time, the old value and the new value (changed value) for that work item.

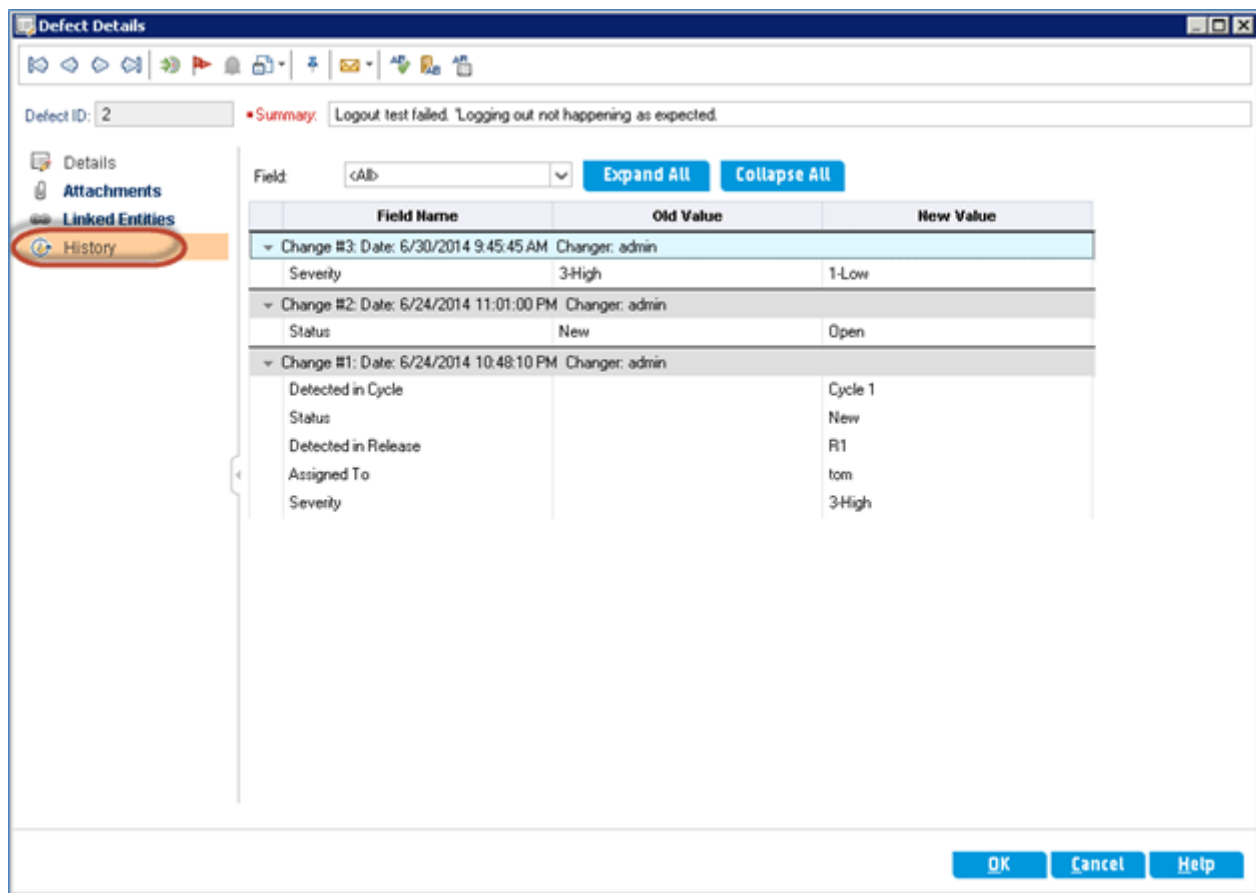
This feature is available in the following modules.

- Requirements
- Test Plan
- Test Lab
- Test Resources
- Test Runs
- Defects

For Demo purpose, let us see the history of a selected defect.

**Step 1)** Open a defect and defect details dialog is displayed to the user.

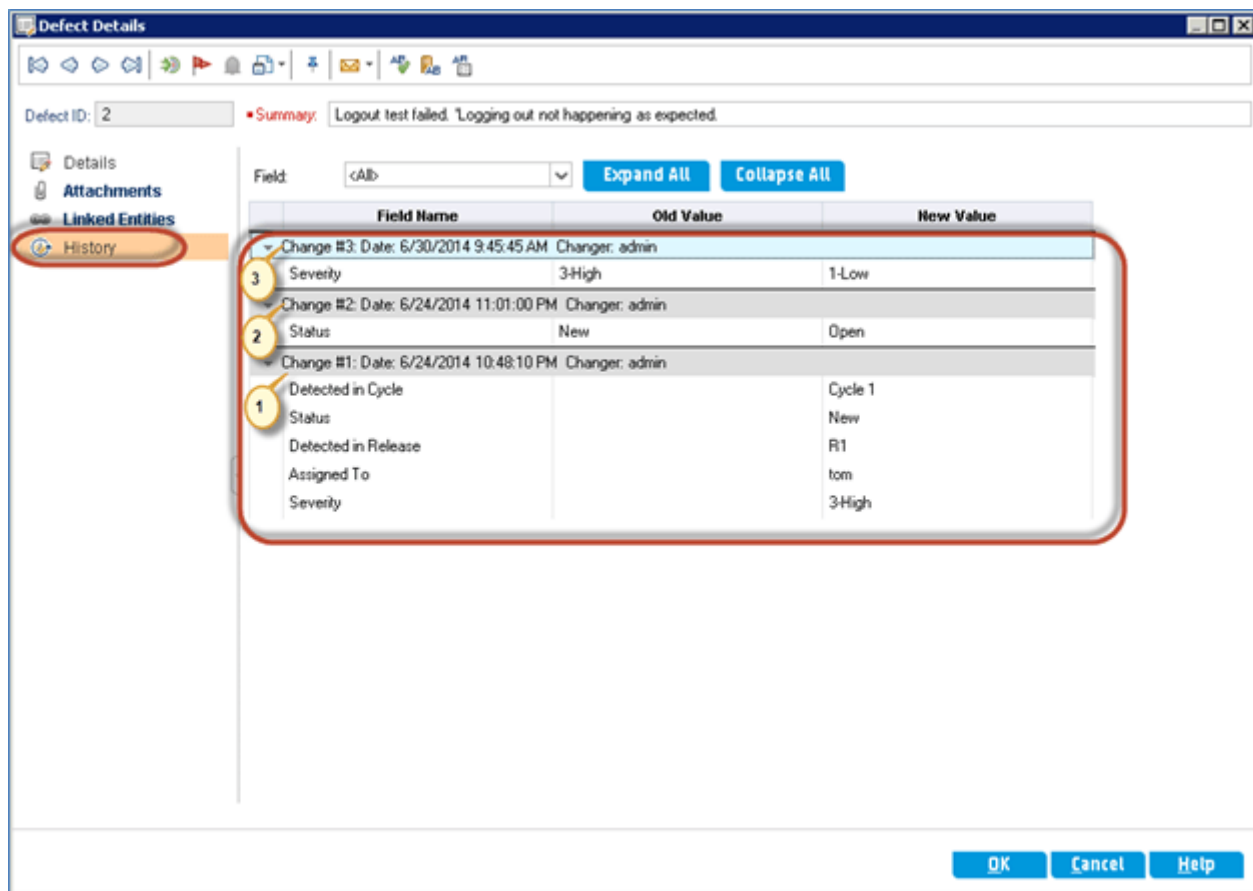
1. Navigate to History Tab
2. User can find the list of all the changes for this defect.



(./images/hpalm/071114\_1017\_Gettingused21.png).

**Step 2)** Let us understand the history of the selected defect.

1. In Change#1 only new value columns are populated as the defect is created for the first time.
2. In Change#2 the Field 'Status' is changed from 'New' to 'Open'
3. In Change#3 the Field 'Severity' is changed from 'High' to 'Low'



(/images/hpalm/071114\_1017\_Gettingused22.png).

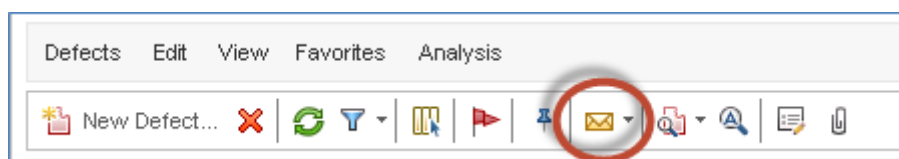
## How to send Email

Send Mail Functionality in ALM, allows users to send an email about the details of an entity to other users. The user has an option to include attachments and history while sending an email.

This feature is available in the following modules.

- Requirements
- Test Plan
- Test Resources
- Test Runs
- Defects

**Step 1)** The 'send mail' feature can be accessed by directly performing a click on 'Send by E-mail' icon as shown below.



(/images/hpalm/071114\_1017\_Gettingused23.png).

**Step 2)** The 'Send E-mail' Dialog is displayed to the user.

1. Add users who need to be in 'To' List.
2. Add users who need to receive mail in 'CC' List.
3. The Subject is prepopulated, however user can edit the subject before sending an email.
4. User has capabilities to include 'Attachments' as well. This option corresponds to the attachments against a work item. Hence user cannot add any additional attachments from their hard drive while sending an email using the below dialog.
5. If 'History' checkbox is checked the history of the work item will also be included in the mail.
6. Click 'Send'.

The screenshot shows a 'Send E-mail' dialog box with the following fields and controls:

- To:** A text field containing 'guru99' (callout 1).
- CC:** A text field containing 'sophie' (callout 2).
- Subject:** A text field containing 'BANKING.GURU99\_BANK - Defect #2 - Logout test failed. 'Logging out not happening as expected'' (callout 3).
- Item:** A section with a checked checkbox and a document icon, followed by the text '2 - Logout test failed. 'Logging out not happening as expected.''. Below this is a large empty text area.
- Include:** Two checkboxes: 'Attachments' (checked, callout 4) and 'History' (checked, callout 5).
- Additional comments:** A text area with a rich text editor toolbar (callout 6) containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, undo, redo, table, insert, and search.
- Buttons:** 'Send', 'Cancel', and 'Help' buttons at the bottom right.

(/images/hpalm/071114\_1017\_Gettingused24.png).

**Note:**

- We can also send email to the other users who are NOT in ALM database by directly entering their email addresses in To or CC list.
- It is also understood that we will be able to add ALM users if and only if the user's email ID is updated in ALM database.





- Sending an Email option sends all details such as test data, steps, status of each one of those steps.
- User also has an option to include attachments and history of that specific work item while sending the email (You cannot add attachments from your local hard drive)

**Step 3)** The Status of the email would be displayed to the user upon clicking 'send' button.



(/images/hpalm/071114\_1017\_Gettingused25.png).

## How to use Column chooser

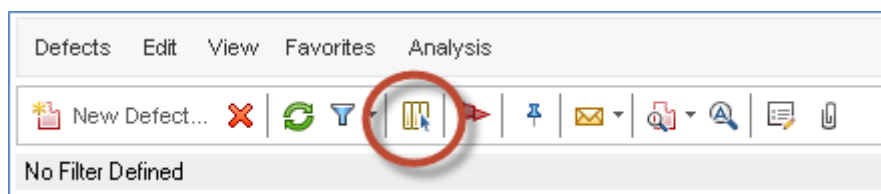
Column Chooser option in ALM allows users to choose the columns that the user would like to see against each work item. The columns that are not chosen by the user will be hidden from the users view.

This feature is available in the following modules.

- Requirements
- Test Plan
- Test Runs
- Defects

For demo purpose, we will understand the column chooser option by selecting only the relevant columns in defects module.

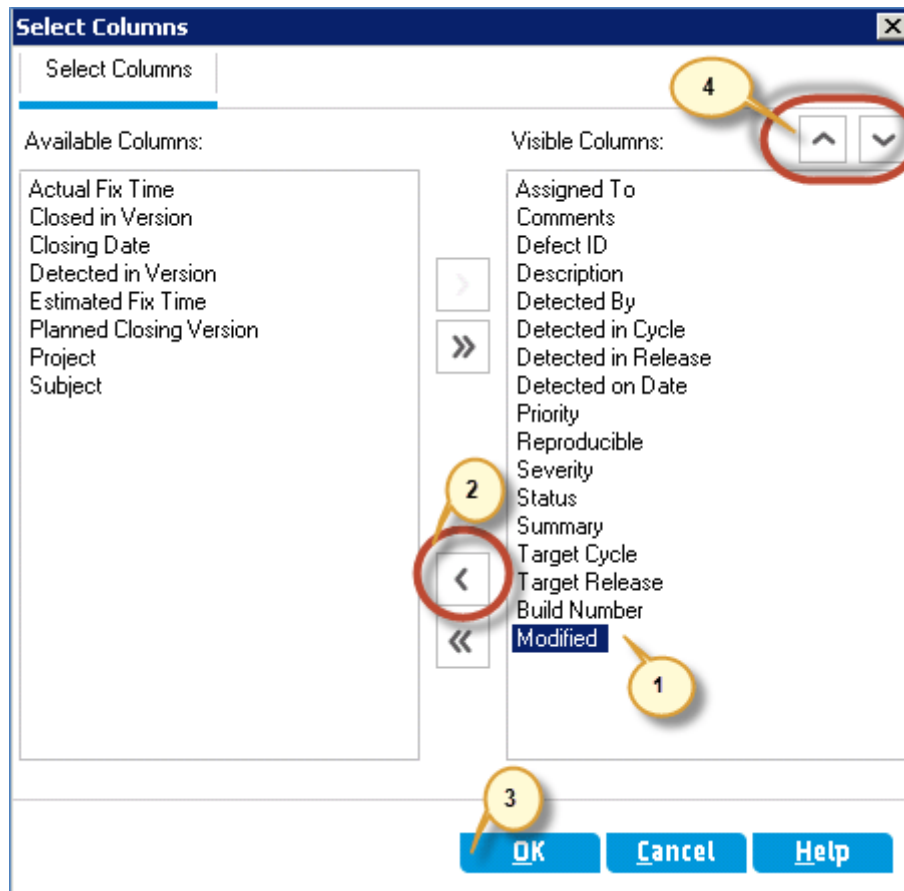
**Step 1)** Click 'Column Chooser' icon as shown below.



(/images/hpalm/071114\_1017\_Gettingused26.png).

**Step 2)** The Column Chooser Dialog is displayed to the user.

1. Select the Fields under 'Visible Columns' Section that you would like to hide it from your view
2. Click '<' Button to push the selected column to 'Available Columns' List
3. After pushing all the unnecessary columns from 'Visible Columns' list to 'Available Columns' list, Click 'OK'.
4. The order of the columns can be controlled with the help of the 'up' and 'down' arrows under 'Visible Columns' pane.



(/images/hpalm/071114\_1017\_Gettingused27.png).

Note: The order of columns displayed in defects module would be same as that of the order specified under 'Visible Columns' section.

**Step 3)** Now, only the selected columns are displayed to the user as shown below.

Assigned To	Comments	Defect ID	Description	Detected By	Detected In...	Detected R...	Detected on...	Priority	Reproducible	Severity
tom		1	Mandatory fields check are NOT happening...	admin			12/23/2014		Y	1-Low
jule		2	Logout test failed. Logging out not happen...	jule	Cycle 1	R1	1/1/2017			1-Low
glenn		3	Negative amount in Deposit Module. Use...	glenn	Cycle 1	R1	2/1/2017			1-Low
admin		4	Deposit Module - Description field check ...	admin	Cycle 1	R1	3/1/2017			1-Low
tom		5	Exception on clicking 'cancel' button in co...	tom	Cycle 1	R1	1/15/2017			1-Low
jule		6	Able to Delete an Active Account	jule	Cycle 1	R1	3/31/2017			2-Medium
glenn		7	Delete Account - Exception thrown when I...	glenn	Cycle 1	R1	3/4/2017			3-High
admin		8	Delete Invalid Account - throws NON Res...	jule	Cycle 1	R1	1/31/2017			1-Low
tom		9	Accepts Invalid Amount in Withdrawal mo...	glenn	Cycle 1	R1	1/20/2017			5-Urgent
jule		10	Add Customer - Mandatory Field Check f...	admin	Cycle 1	R1	2/20/2017			1-Low
glenn		11	Add Customer - Mandatory Field Check f...	tom	Cycle 1	R1	2/4/2017			2-Medium
admin		12	Invalid Error Message on adding Alphanu...	jule	Cycle 1	R1	2/3/2017			3-High
tom		13	Exception on clicking 'Submit' button in A...	glenn	Cycle 1	R1	2/12/2017			4-Very High
jule		14	Invalid Error Message when user submits...	jule	Cycle 1	R1	2/17/2017			5-Urgent

(/images/hpalm/071114\_1017\_Gettingused28.png)

## How to Set Defaults

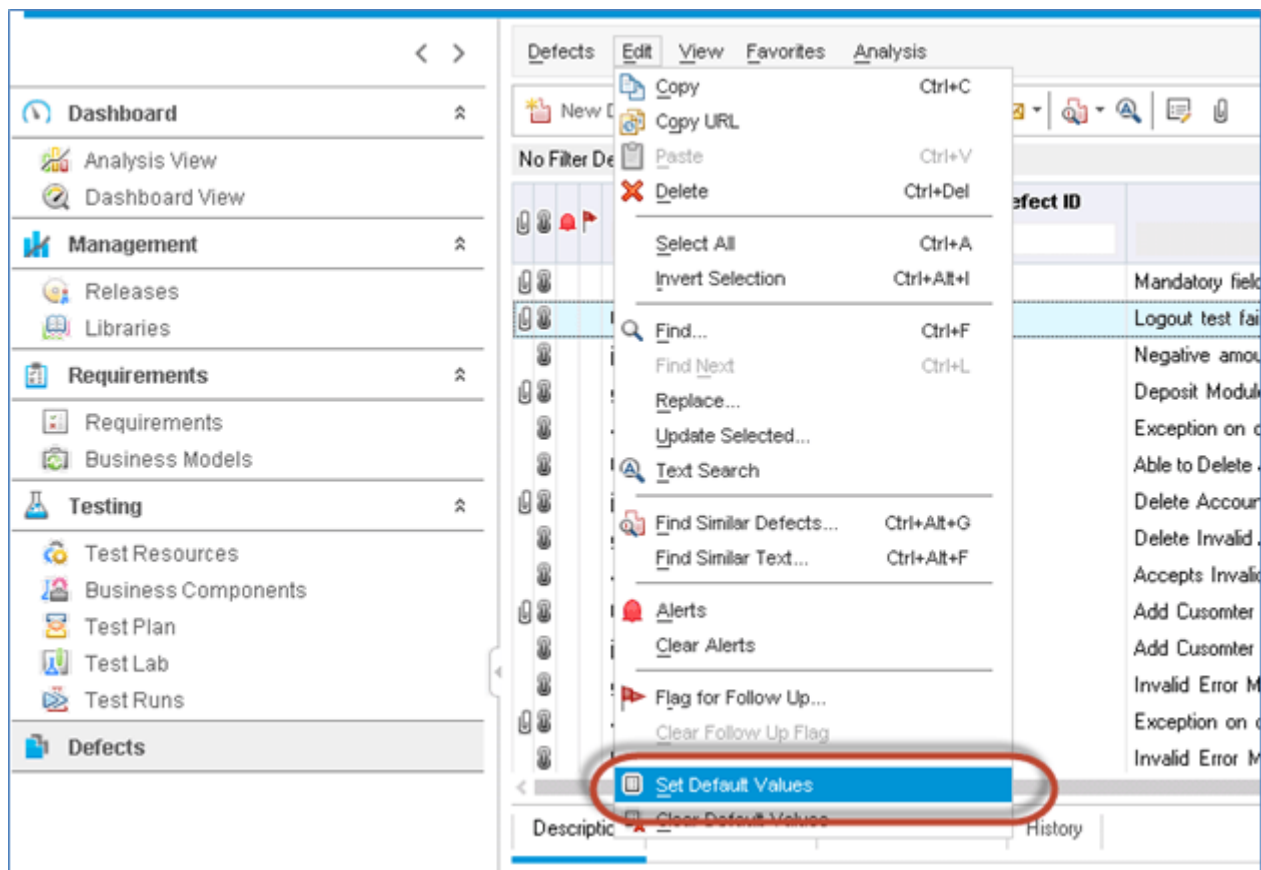
Set defaults allows the ALM users to set default values for certain fields which will be prepopulated when user creates a new work item of that type.

This feature is available in the following modules.

- Tests.
- Defects.

For Demo purpose, let us understand how to set default for a list of fields in 'Defects' Module.

**Step 1)** The 'Set Default Values' Option can be accessed by navigating to 'Edit' Menu as shown below.



(./images/hpalm/071114\_1017\_Gettingused29.png).

**Step 2)** The 'Set Default Values' Dialog box is displayed to the user.

1. Select the Field name to which you would like to have a default value.
2. Enter the Value of the field name which has to be defaulted every time.
3. Click 'Add'

You can select field values as default values for the 'Defect' entity. The values are entered in the order below. You can change the order using the up/down buttons.

Field: Build Number (BG\_USER\_01) Values: 1.0 Add

Selected values: Remove Up Down

Field	Values
-------	--------

☒ When creating a new entity, use these defaults automatically

OK Cancel Help

(/images/hpalm/071114\_1017\_Gettingused30.png).

Likewise, we will add default values for other fields

**Step 3)** Upon adding all the Default values, the 'Set Defaults Values' Dialog would be as shown below.

1. The list of all fields and their default values are listed.
2. Enable 'When creating an entity use these values automatically' so that whenever user clicks on 'New Defect' Icon from defects module these fields would be defaulted to the preset values.
3. Click 'OK'

**Set Default Values**

You can select field values as default values for the 'Defect' entity. The values are entered in the order listed below. You can change the order using the up/down buttons.

Field:  Values:

Selected values:

Field	Values
Build Number (BG_USER_01)	1.0
Detected in Release (BG_DETECTED_IN_REL)	R1
Target Cycle (BG_TARGET_RCYC)	Cycle 1
Priority (BG_PRIORITY)	2-Medium

☒ When creating a new entity, use these defaults automatically

(/images/hpalm/071114\_1017\_Gettingused31.png).

**Step 4)** Now click on 'New Defect' button in defects module. The default values are populated against those fields that are added under 'Set Defaults' dialog as shown below.



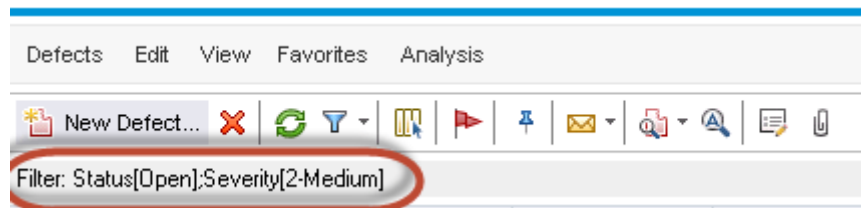
But using favorites we can access the defect which meets the above said criteria in a single click.

This feature is available in the following modules.

- Requirements.
- Test Plan.
- Test Lab.
- Defects.

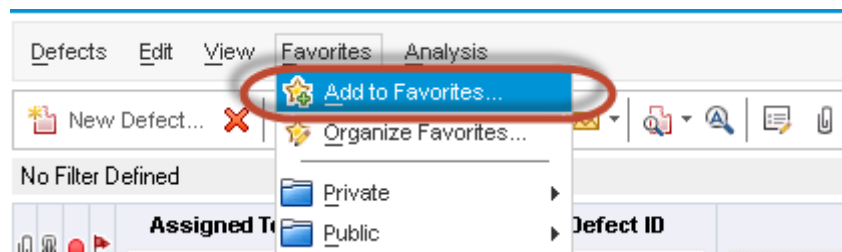
For Demo Purpose, Let us apply favorites for accessing defects that are in 'Open' Status and that are having 'medium' severity.

**Step 1)** Before adding a favorite, let us apply filter for displaying medium severity open defects.



(./images/hpalm/071114\_1017\_Gettingused33.png).

**Step 2)** Now navigate to 'Favorites' Menu and select 'Add to Favorites'.

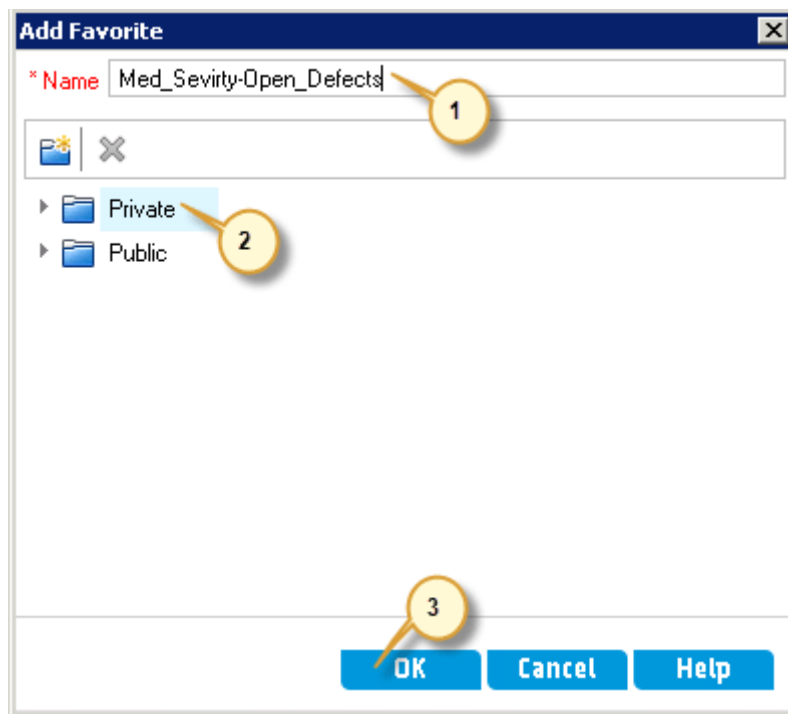


(./images/hpalm/071114\_1017\_Gettingused34.png).

**Step 3)** The 'Add Favorite' Dialog box opens.

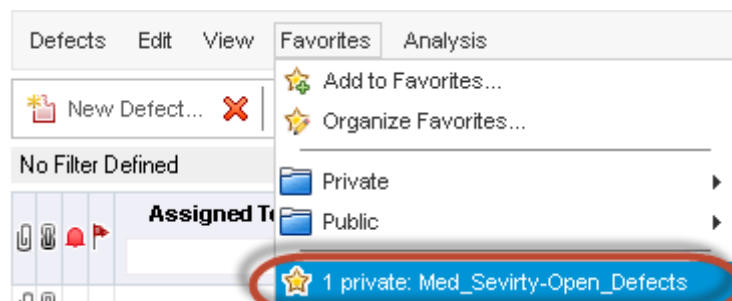
1. Enter the name of the Favorite
2. Select the folder (private or public) where the favorite has to be saved.
3. Click 'OK'





(./images/hpalm/071114\_1017\_Gettingused35.png).

**Step 4)** The added favorite can be accessed by navigating to favorites menu and selecting the same as shown below.



(./images/hpalm/071114\_1017\_Gettingused36.png).

**Step 5)** The favorite page is displayed.

1. Displays the status with favorite name and favorite type (private in this case) along with the filter applied on the data.
2. We can see that medium severity open defects are displayed to the user.

Video on Favorites

Click [here \(/faq.html#1\)](/faq.html#1) if the video is not accessible

### points to note

- You can create favorite view in Quality Center window with your own custom settings.  
Example, in defects grid, you may want create a favorite view to show only defects detected by you or assigned to you.
- A favorite View can be public or private.
- Private favorite is visible only to you.
- Public favorite is visible to all Quality Center users.

◀ Prev (</hp-alm-dashboard.html>)

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