Table of Content:

1. Server Connection
2. Activate or Deactivate Users
3. Add Users to Projects
4. Create Projects
5. Create Users
6. Delete Users
7. Delete Users from Projects
8. List Domains and Projects
9. List Users Group Permission
10. Server Connection – Connect to your ALM instance to perform tasks using SaaS Administration REST API
11. Bring up the QC\_SaaSAdminAddon.xlsm
12. Navigate to the Connection tab
13. Enter the ALM Server URL
14. Enter your API Key and Secret. If you don’t have this information then, you need to request from you Customer Admin to create one.
15. Enter the Customer ID. You can get this information from opening a ticket with the SaaS Support team.
16. Select the task you want to perform. Below are the possible Tasks

* Activate/Deactivate Users
* Add Users to Projects
* Create Projects
* Create Users
* Delete Users
* List Domains and Projects
* List Users Group Permission

1. Click on “Connect” button to execute

Graphical user interface, application

Description automatically generated

1. Activate or Deactivate Users – Use REST API to Activate or Deactivate users.
2. Navigate to the “Activate or Deactivate Users” tab
3. Fill in the Excel row(s) with the user’s information to active/deactivate

login-name – Name of the user to apply task

is-activate – Set value to “true” to activate user and “false” to deactivate

Example:

Table

Description automatically generated with medium confidence

1. Add Uses to Projects – Use REST API to a add users to projects and groups. This example can also be used to remove a user from a group in a project. A user will need to belong to at least 1 group. You cannot remove a user from all groups in a project.
2. Navigate to the “Add Users to Projects” tab
3. Fill in the Excel row(s) with the user’s information to add to project

domain – Name of domain

project - Name of project

user – Name of user to be added

role-name – Name of the group in the project

is-member – Set value to “Y” to add user to group and “N” to remove user from group

Example:

Table

Description automatically generated

1. Create Projects – Use REST API to add project to instance
2. Navigate to the “Create Projects” tab
3. Fill in the Excel row(s) with project’s information to create

Domain – Name of the domain to place the project in

name - Name of the project to be created

type - Always QCProject

customization - Leave blank. Hard coded value to “[]”

enable-project-vc – Set value to “true” to enable Version Control and “false” to disable Version Control

link-project-to-template – Set value to “true” to link project to template and “false” to unlink from template

link-to-template-copied-project - Set value to “true” to automatically link to source template and “false” to not link to source template

create-from-domain – Name of source domain. Leave blank if not copying project.

deactivate-if-activate - Set value to “true” to deactivate project if project is active before copy and “false” to cancel task if project is still active

create-from-template - Name of source template. Leave blank if not copying template project.

extension-name-to-enable – Leave blank. No documentation on possible values

create-from-project – Name of source project. Leave blank if not copying project.

type-to-copy-from – Leave value as “0”. No documentation on parameter.

is-active – Set value to “true” to activate project upon completion and “false” to deactivate it upon completion

is-enable-pc-extension - – Set value to “true” to enable PC extension upon completion and “false” to not enable “PC” extension

Example:

Graphical user interface, application

Description automatically generated

1. Create Users – Use REST API to create new users in instance
2. Navigate to the “Create Users” tab
3. Fill in the Excel row(s) with user’s information to create

email - Email of the user. Must be unique for SSO.

phone - Phone of the user

role – SaaS Add-on Role. Possible value are “Basic User” and “Customer Admin”. Other roles are possible if existing in instance.

login-name – Login Name of the user. Must be unique.

full-name – Full Name of the user.

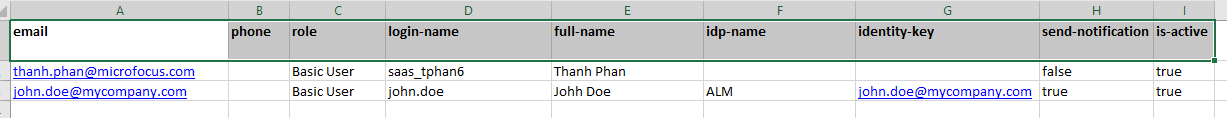
idp-name – For SSO. Possible value is “alm” for SSO and “local” for non SSO users.

identity-key – For SSO. Must be unique value. Can be email or login name depending on setup. Field is case sensitive.

send-notification - Set value to “true” to send email to user with login info and “false” to not send email

is-active - Set value to “true” to make user active or “false” to deactivate user

Example:



1. Delete Users – Use REST API to delete users from instance
2. Navigate to the “Delete Users” tab
3. Fill in the Excel row(s) with the project’s information to delete

login-name – Name of the user to delete from instance

Example:

Table

Description automatically generated

1. Delete Users from Projects – Use REST API to delete users from projects
2. Navigate to the “Delete Users From Projects” tab
3. Fill in the Excel row(s) with the user’s information to delete

domain - Name of domain

project - Name of prjoect

user - Name of the user to delete from project

Example:

Table

Description automatically generated

1. List Projects and Domain – Use REST API to get list of domains and projects in the instance. Only the list of projects under the End Customer will be displayed.
2. Navigate to the “List Domains and Projects” tab

Example:

Graphical user interface, application, table

Description automatically generated

1. List Users Group Permission – Use REST API to get list of users and their group permission for each project under the End Customer. This example will require you the have access to each project because it uses the Core REST API to get the list of users under the project
2. Navigate to the “List Users Group Permission” tab

Example:

