Create a new Project from template:

1. Log into the Helix ALM Server Admin Utility

2. Click on Projects

3. Select the project you wish to archive

4. Click "Create from Template"

5. Fill in the Description - this must be a unique name.  Leave all other settings default.

6. Click "Ok"

New project is now created with the same workflow, users, customers, reports, filters, etc. There is no data.

Archiving Defects:

1. Log into the Helix ALM Project you wish to archive

2. Create a filter that will display only the defects you wish to archive

3. Apply the filter

4. Select all the defects displayed

5. Select <File>Export>XML Export>

6. Ensure "Export only the Selected defects" is selected

7. Check "Export file attachments with defects"

        -No reason to select "Export historical log information with defects" as this information can not be imported because it is system generated.

8. Click "Export"

9. Choose directory and file name to save the .xml file

10. Click "Save"

Export function will perform and a zip file will be created that includes all attachments and an .xml file.  And you are now ready to import the XML file into the new project you created from template.

Importing XML file:

1. Log into the Helix ALM Project you created from template

2. Select <File>Import>XML Import>

3. Click on "Browse" and browse to the xml file you created in the steps above

4. Choose the Defect Number Import Options you prefer

5. Choose how you wish the import utility to handle pop-up menu items that don't exist (shouldn't have any of these)

6. Click "Import"

All the defects you exported will now be imported along with their corresponding attachments.

Now you will go into the production project use the filter you created to display the data you wished to archive and delete the defects.  DO NOT delete them all at once or the client will time out and crash during the process.  You will need to try different sized chunks to delete to find the amount you can do without crashing the client.

Once you have all the defects deleted; you now need to "compact" the database to permanently remove these items from the tables.  And take the other project "Off Line"

1. Log into the Helix ALM Server Admin Utility.

2. Click on "projects"

3. Select the project you just deleted the defects from

4. Click on "Edit"

5. Select "Compact the project the next time the Helix ALM server is started"

6. Click "Ok"

You are now back to the "Projects" window.

7. Select the project you created from template

8. Click on "Inactivate"

9. Click on "Remove"

As far as Helix ALM knows the project no longer exists and it is safe to move the project directory off the machine.  The project directory by default is located in \Helix ALM\TTServDB\TTDbs\<project name>