

# HP ALM 11.0 – V1.0

## Lab Book

## Document Revision History

Date	Revision No.	Author	Summary of Changes
July-2016	1.0	Vaibhav Khandekar Prashant Naik	New content creation

## Table of Contents

Document Revision History .....	2
Table of Contents .....	3
Lab 1. Launch HP ALM.....	4
1.1 HP ALM Home Screen .....	4
1.2 HP ALM Login Screen .....	4
Lab 2. Release and Cycle Creation .....	5
2.1 Verify Creation of Release .....	5
2.2 Verify Creation of Cycle.....	6
Lab 3. Specifying Requirement.....	7
3.1 Defining Requirement.....	7
3.2 Viewing Requirement .....	7
3.3 Upload Requirements in HP-ALM .....	8
Lab 4. Test Lab Module .....	10
1.1 Verify Creation of Test Set .....	10
1.1 Execution of Test cases from Execution Grid .....	11
Lab 5. Creation of Defect and linking to the test case .....	12
3.1: Creation of a new defect in HP ALM .....	12
3.2: Link a defect to Test case. ....	12
Lab 6. Creation of Defect and linking to the test case .....	13
6.1: Creation of a new Graph in HP ALM .....	13
6.2: Configure Graphs in HP ALM .....	13
6.3: Generating Predefined Graphs in HP ALM .....	13
6.4: Generating Dashboard Pages in HP ALM.....	14

## Lab 1. Launch HP ALM

<b>Goals</b>	<ul style="list-style-type: none"><li>• Understand &amp; learn the process of launching HP ALM application.</li><li>• Understand &amp; learn the process of login into HP ALM application.</li></ul>
<b>Time</b>	10 Minutes

### 1.1 HP ALM Home Screen

Validate whether user is able to Launch HP ALM application by using URL.

#### Steps to Launch HP ALM application

1. Open Web browser i.e. I.E browser
2. Launch the HP ALM application using correct URL:
3. Hit Enter button
4. HP ALM application will be launched successfully.
5. User will get Login screen

### 1.2 HP ALM Login Screen

Validate whether user is able to login into HP ALM application by valid credentials.

#### Steps to Login into HP ALM application

**Pre-Condition:** User should be available on Login Screen

1. Type valid Username and Password
2. Click on Authenticate button
3. Select appropriate Domain and Project from dropdown
4. Click on Login button
5. HP ALM Window will be launched successfully.
6. User will get access to all modules

## Lab 2. Release and Cycle Creation

<b>Goals</b>	<ul style="list-style-type: none"><li>• Understand &amp; learn the process of creating releases in HP ALM.</li><li>• Understand &amp; learn the process of creating cycles under release in HP ALM.</li></ul>
<b>Time</b>	30 Minutes

### 2.1 Verify Creation of Release

Validate whether user is able to Create Release in HP ALM. Format of Date field is mm/dd/yyyy

#### Steps to Create Release in HP ALM

1. First step is to navigate to Management tab and click on "**Releases**" Tab.
2. Before creating a release, we can create a container/folder by clicking on a "**New Folder**" icon in releases module:
3. Give the folder name "2017"
4. Next step is to create new releases. To create a new release, click "**new release**" button and the New Release dialog opens.
5. Enter the following mandatory details as per below table:
  - a. Release Name
  - b. Start Date of the Release
  - c. End Date of the Release
  - d. Brief Description about the release (Optional)

Release Name	Start Date	End Date
2017 >> <b>Release R1</b>	01/01/2017	06/30/2017
2017 >> <b>Release R2</b>	07/01/2017	12/31/2017

6. After Entering the above details click "OK". The Release will be created.
7. Upon Selecting a particular Release, one can see the tabs that are relevant to the Releases.
8. Select Details Tab to retrieve the information about the details of the release that was provided during the creation of the Release.

## 2.2 Verify Creation of Cycle

Validate whether user is able to Create Cycle in HP ALM. Format of Date field is mm/dd/yyyy

### Steps to Create Cycle in HP ALM

1. Select the Release under which you would like to create cycles
2. Click on "New Cycles" button and the new cycles dialog box opens where the release timelines are prepopulated as this cycle is created under the selected release.
3. User has to enter the following mandatory details in 'New Cycles' Window as per below table:
  - a. Name of the Cycle
  - b. Start Date of the Cycle
  - c. End Date of the Cycle.
  - d. Description (Optional)

Release	Cycle Name	Cycle Start Date	Cycle End Date
Release R1	Cycle 1	01/01/2017	03/31/2017
	Cycle 2	04/01/2017	06/30/2017
Release R2	Cycle 1	07/01/2017	09/30/2017
	Cycle 2	10/1/2017	12/31/2017

4. Once all the cycle is created, user can access the same under created Release.
5. Select a particular cycle to access details of that cycle.

## Lab 3.Specifying Requirement

<b>Goals</b>	<ul style="list-style-type: none"> <li>• Understand &amp; learn the process of Defining Requirement in HP ALM.</li> <li>• Understand &amp; learn the process of View Requirement in HP ALM.</li> <li>• Understand &amp; learn the Requirement Workflow in HP ALM.</li> </ul>
<b>Time</b>	60 minutes

### 3.1 Defining Requirement

Validate whether user is able to Create New Requirements in HP ALM.

#### Steps to Create New Requirements in HP ALM

1. First step is to navigate to Requirements tab and click on "Requirements" Tab
2. Before creating a Requirement, we can create a container/folder by clicking on a **"New Folder"** icon in Requirements module:
3. In Requirements tree, select the root Requirement folder
4. Click the New Requirements Folder button
5. The New Requirement Folder dialog box opens. In the Requirement Folder Name box, type Requirement folder name **"2017"**
6. Click OK
7. The new Requirement folder is added to the Requirement tree
8. In Requirement tree, select the Requirement folder and Click the New Requirement button
9. The New Requirement dialog box opens
10. In the Name box, type requirement name "Login\_sample"
11. Select Requirement Type "Functional"
12. Target Release and Cycle(previously created release and cycle)
13. Type Requirement Description in box and Click OK
14. The requirement is added to the folder.

### 3.2 Viewing Requirement

Validate whether user is able to view Requirements in HP ALM.

#### Steps to View Requirements in HP ALM

1. First step is to navigate to Requirements tab and click on "Requirements" Tab
2. Choose View >> Requirements Tree to display requirements in a tree
3. User is able to see detail view of requirement
4. Select columns to be visible in requirement tree by applying filter
5. Define a filter to view requirements created on a specific date
6. Click the Filter button. The Filter dialog box opens
7. For selected field, click the Filter Condition box
8. Click the down arrow button. The Select Filter Condition dialog box opens

### 3.3 Upload Requirements in HP-ALM

Validate whether user is able to upload Requirements in HP ALM.

**Pre-condition:** Requirements should be uploaded into excel sheet before uploading into ALM

#### Steps to Upload Requirements in HP ALM

1. Requirements are uploaded into Excel Sheet (Please refer the attached format)

1	Path	Name	Description	Comments	Requirements	Reviewed	Priority	Author	Target Release	Target Cycle	Attachments
2	2014.1\Functional	UI Design	Develop th	Develop th	Functional	Not Review	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 1	D:\QC Doc
3	2014.1\Functional\UI Design	Left Pane	Link to all Calculator	T	Functional	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 1	
4	2014.1\Functional\UI Design	Header Tab	Link to home, Current	Functional	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 1		
5	2014.1\Functional\UI Design	Calculator	Link to all types of Cal	Functional	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 1		
6	2014.1\Functional\UI Design	Link to Social	It should have links to	Functional	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 1		
7	2014.1\Functional	Math Calc	Math Calculation Cre	Business	Reviewed	5-Urgent	admin	2014\2014.1	2014\2014.1\Cycle 1		D:\QC Doc
8	2014.1\Functional\Math Calculation Creation	Mortgage	Mortgage (Develop th	Business	Reviewed	5-Urgent	admin	2014\2014.1	2014\2014.1\Cycle 1		
9	2014.1\Functional\Math Calculation Creation	Loan Calc	Loan Calculator Creat	Business	Reviewed	5-Urgent	admin	2014\2014.1	2014\2014.1\Cycle 2		
10	2014.1\Functional	Advertiser	Advertisement shoul	Functional	Reviewed	1-Low	admin	2014\2014.1	2014\2014.1\Cycle 2		
11	2014.1\Functional\Advertisement Panel	Advertiser	Upon Click the webst	Functional	Reviewed	1-Low	admin	2014\2014.1	2014\2014.1\Cycle 2		
12	2014.1\Functional	Social Web	Social Website Links	Functional	Reviewed	1-Low	admin	2014\2014.1	2014\2014.1\Cycle 2		
13	2014.1\Functional\Social Websites Grid	Availabilit	Connect to Social Net	Functional	Reviewed	1-Low	admin	2014\2014.1	2014\2014.1\Cycle 2		
14	2014.1\Functional	Website F	Website Footer Grid	Functional	Reviewed	1-Low	admin	2014\2014.1	2014\2014.1\Cycle 2		
15	2014.1\Won Functional	Performan	Performance Testing	Performan	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 3		D:\QC Doc
16	2014.1\Won Functional\Performance	Parameter	User : 200, Latency : 3	Performan	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 3		
17	2014.1\Won Functional	Security	Security Check	Undefined	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 3		
18	2014.1\Won Functional	Cross Brow	To be Compatible wit	Undefined	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 3		
19	2014.1\Won Functional	Cross Platf	To be Compatible wit	Undefined	Reviewed	4-Very High	admin	2014\2014.1	2014\2014.1\Cycle 3		

2. Create the Requirement Release Folder in QC where user wants to upload the requirements
3. Navigate to ALM home page and click on "Tools" from the list of links.
4. Click on "More HP ALM Addins" Link from the addins page as shown below.
5. In the Addins page, select "Addins for Microsoft applications" and choose "Microsoft Excel"
6. Upon selecting "Microsoft Excel", choose ALM 11.5 Excel addins. The exe file will be downloaded. Please also take a note of the supported MS Office Editions as shown in the below screenshot.
7. Once the Addin is installed, upon opening the excel file and going to Addins tab, one can see Export to ALM button.
8. Enter the Quality Center credentials to successfully establish a connection.
9. Select the Domain and Project as shown below and click "Next".
10. Select the Type of data that the user wishes to upload. In this case it is requirements.
11. Enter a New map name. Upon creating once we can reuse it any number of times for uploading Requirements.
12. Select the "Requirement Type" Column that we are going to upload. This should match as that of the Excel that we wish to upload.
13. The Field Mapping Dialog opens. Here the user has to map the field in Quality Center against the column ID in Excel.



14. Select the HP ALM Field and click on Arrow Button. Map Field with Column Dialog opens. There the column Name in Excel should be entered
15. Map all the relevant columns. The Column Name in Red are the mandatory fields and  
Click "Export"
16. The Data would be uploaded and it displays the final output. If successful it will upload completely and displays a message to the user with "Finish" Button
17. Login to Quality Center and check if the requirements are uploaded correctly or not.

## Lab 4. Test Lab Module

<b>Goals</b>	<ul style="list-style-type: none"><li>• Learn the process of creating Test Set Folder and adding test cases in execution grid.</li><li>• Learn the process of executing the Test cases from Test set</li></ul>
<b>Time</b>	120 minutes

### 1.1 Verify Creation of Test Set

Validate user is able to Create Test set under Test Lab Module.

Steps to Create Test set under Test Lab module in HP ALM Application.

1. First step is to create a root folder as a container for having the test sets. We can name it in line with the release and cycle so that it is easy to track.
  - a. Go to 'Test Lab' Module under 'Testing' Tab
  - b. Create a new Folder by Clicking on 'New Folder' icon.
  - c. The 'New Test Set Folder' Dialog opens. Enter the name of the folder as '2017 R1 – Cycle 1'.
  - d. Click "Ok"
2. The Test Run Folder would be created.
3. Select the created folder and assign 'Cycle' to it which means the entire test set should be executed for Cycle 1.
4. Enter the name of test set and click 'OK'.
5. After creating the test set, we need to select the tests and add it to the test set.
  - a. Select the Test Set.
  - b. Navigate to "Execution Grid"
  - c. Click "Select Tests" button. Test Plan Tree comes up.
  - d. Select the Test to be executed for this cycle.
  - e. Click '<=' button
6. Select tests will be displayed in Execution Grid.
7. Repeat the above steps to create more test sets and select all the relevant tests planned for this cycle.

## 1.1 Execution of Test cases from Execution Grid

Validate user is able to execute test cases from execution grid under Test Lab Module.

Steps to execute test cases from execution grid in HP ALM Application.

1. Tests can be executed using below two options:
  - **Run Test Set** – This option allows user to execute all the tests in a selected test set.
  - **Run** – This option helps user to execute just the selected test.
2. Select “Run” option.
3. Two options will be displayed to the user.
  - **Manual Runner (default)** – The order of the tests displayed during the execution would be as that of the order that is displayed in the test set grid.
  - **Automatic Runner** – The order of the tests displayed during execution would be shown as that of the order set in the execution flow tab.
4. Click on Manual Runner (default) option.
5. Manual test runner displayed to the user.
6. Click on Begin Run button.
7. Below things will be displayed to the user.
  - a. Step numbers created during test design phase.
  - b. Description of selected step
  - c. Expected result of selected step.
8. Pass or fail each test step based on execution result.
9. Click on End Run button.
10. Repeat the above steps for all other test cases in execution grid.

## Lab 5. Creation of Defect and linking to the test case

<b>Goals</b>	<ul style="list-style-type: none"><li>• Learn the process of creating a new defect in HP ALM</li><li>• Understand the process of linking the defect to test case.</li></ul>
<b>Time</b>	120 minutes

### 3.1: Creation of a new defect in HP ALM

Validate user is able to Create new defect for failed test case under Defects Module.

Steps to Create defect under Defects module in HP ALM Application.

1. Navigate to defects Tab in Quality Center and Click on "New Defect" button.
2. The "New Defect" Dialog Open up. Fill in the following mandatory information.
  - a. Enter Detected By Field
  - b. Enter the Detected on Date – By Default current date would be picked up
  - c. Set Severity level of a defect
  - d. User can also enter other information and brief description about the defect.
3. Attach screenshots/other relevant files associated with the defect using 'attachments' tab.
  - a. Click "Attachments" tab.
  - b. Click "Attachments" button.
  - c. Select a file from file explorer dialog.
  - d. Click "Open".
4. Selected file should be attached under attachment section.
5. Click on "Submit" button and verify the generated Defect ID.
6. Verify the newly posted defect in Defects tab.

### 3.2: Link a defect to Test case.

Validate user is able to link a defect to failed test case in HP ALM application.

Steps to link a defect to test case in HP ALM Application.

1. Go to Test Lab tab and choose the test that failed.
2. Click on Linked Defects and verify available two options
  - a. Add and link defect
  - b. Link Existing Defect.
3. Click on Link Existing Defect option.
4. Link Existing Defect pop up window opens up.
5. Enter the Defect ID and click on Link button.
6. Defect ID should be displayed under Linked Defects.

## Lab 6. Creation of Defect and linking to the test case

<b>Goals</b>	<ul style="list-style-type: none"> <li>• Learn the process of creating a Graph in HP ALM</li> <li>• Understand the process of Creating Dashboard.</li> </ul>
<b>Time</b>	120 minutes

### 6.1: Creation of a new Graph in HP ALM

Validate user is able to Create new Graph under Dashboard Module.

Steps to Create Graph under Dashboard module in HP ALM Application.

1. Select "Analysis view" under Dashboard Tab
2. Open the graph wizard. Click the New Item button and select Graph Wizard. The graph wizard opens on the Select Graph Type dialog box
3. Select Entity (Defect, Requirement, Tests etc.)
4. Select the graph type
5. Define a filter on Detected in Release (You can define filter on various other fields)
6. Set the Graph Attributes
7. Click on 'Finish' button
8. Graph Wizard Output
9. Save the graph in the Analysis View module
10. Click on 'Add to Analysis Tree' button
11. Select Folder (Public or Private)
12. Click on Save

### 6.2: Configure Graphs in HP ALM

Validate user is able to Configure Graph under Dashboard Module.

Steps to Configure Graph under Dashboard module in HP ALM Application.

1. Selecting any Graph of interest provides View tab and Configuration tab on right side
2. Configuration tab provides various selection parameter to configure report as needed

### 6.3: Generating Predefined Graphs in HP ALM

Validate user is able to Generate Predefined Graph for under Dashboard Module.

Steps to Create Predefined Graphs under Dashboard module in HP ALM Application.

1. Select "Analysis view" under Dashboard Tab
2. Choose Module> Analysis > Graphs
3. Select Predefined Graph from the list
4. Select Configuration tab
5. Select filter criteria to generate graph
6. Go to View
7. User is able to view the generated graph

## 6.4: Generating Dashboard Pages in HP ALM

Validate user is able to Generate Dashboard Pages for under Dashboard Module.

Steps to Create Dashboard Pages under Dashboard module in HP ALM Application.

1. On the ALM sidebar, under Dashboard, selects Dashboard View.
2. Add a page to the Public folder.
3. In the tree, select the Public folder.
4. Click the New Page button. The New Dashboard Page dialog box opens.
5. In the Dashboard Page Name field, type Summary of Defects page.
6. Click OK. A dashboard page is added to the dashboard tree under the Public folder.
7. Select the graphs that you want to include in the dashboard page.
8. Click the Configuration tab.
9. In the Graphs Tree pane, expand the Public folder.
10. Expand the Defects folder. The folder includes four graphs.
11. Double-click the first graph. A placeholder for the graph is created in the Configuration tab displaying the graph's title.
12. Add one more graph to the dashboard page.
13. Rearrange the dashboard page
14. View the dashboard page.
15. To view the dashboard page in full-screen mode, click the View Page in
16. Full Screen button, located in the upper-right corner of the page.
17. To view the dashboard page in full-screen mode, click the View Page in
18. Full Screen button, located in the upper-right corner of the page.