

Creating Custom Helix ALM Reports Using a Spreadsheet

If you want to create a report that is not available in Helix ALM or you want to be able to work with the report data, you can export data from the project as a text file and then import it into a spreadsheet like Microsoft Excel. This allows you to sort and arrange the data any way you want, to create custom calculations, and to fine tune your charts.

To create custom reports outside of Helix ALM, complete the following tasks:

- Export the appropriate data as a text file
- Create a template for the export file (optional)
- Import the data into a spreadsheet

Exporting a text file

Use the following steps to export data to a text file.

1. Choose File > Export > Text File Export.
2. Select the field type to export from the Export fields list.
3. Select the fields to export.
4. Select the Export options.
5. Click Export. The Export file dialog box opens.
6. Select the file location and enter a file name.
7. Click Save. A progress indicator opens and lets you know the file is being exported.

Creating a template for the export

If you export text files with the same field layout often, save the format as a Text File Export Template.

1. Set up the fields as described in 'Exporting a text file'.
2. Click the Save button in the Export Templates area on the Export dialog box.
3. Select the file location and enter a file name.
4. Click Save. You return to the Export dialog box.

After you save a layout, use the following steps when you need to export data for the report.

1. Choose File > Export > Text File Export.
2. Click the Load button in the Export Templates area on the Export dialog box.
3. Select the Export Template.
4. Click Open.

5. The template is loaded and you return to the Export dialog box.
6. Click Export.
7. Select the file location and enter a file name.
8. Click Save.

Import the data into a spreadsheet

After you save the data as a text file, you can open it in any spreadsheet and work with it. The following steps are for opening a text file in Excel.

1. Choose File > Open. The Open dialog box opens.
2. Select All Files (*.*) from the Files of type list.
3. Locate the file and click Open. The Text Import Wizard opens.
4. Select Delimited and click Next.
5. Depending on the delimiter you selected when you exported the data, select Tab or Comma.
6. Click Next.
7. Click Finish.

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