

Exporting Helix ALM Data to Microsoft Excel

Note: This article only applies to Helix ALM (and TestTrack 2012 - 2016.1).

Helix ALM uses SQLite for native project databases. To export data to Microsoft Excel from Helix ALM native databases, you need to install a third-party SQLite ODBC driver, such as [SQLite Pro Enterprise Manager](#).

Note: If you only want to work with data displayed in item list windows, it is easier to open items in Excel from Helix ALM and save the data in a new worksheet. In the Helix ALM Client, select the items in the list window to export from and choose Activities > Open in Excel. See the [Helix ALM help](#) for information.

Configuring the ODBC driver

1. Choose Start > Settings > Control Panel.
2. Open the ODBC Data Source Administrator.
3. On the User DSN tab, click Add.
4. Select the SQLite ODBC Driver and click Finish. You are prompted to enter the DSN configuration information.
5. Enter the Data Source Name.
6. Enter the full path to the project database you want to query in the Database Name field or click Browse to locate the database. The default project database location is the computer where the Helix ALM Server is installed.
7. Click OK. The driver is configured.
8. Click OK to close the ODBC Data Source Administrator.

Querying data in Excel

Note: The following steps were tested using Excel 2010. If you use a different version, refer to the Excel help for information about using database queries to import external data.

1. Start Excel and open a new workbook.
2. Click the Data tab.
3. Click From Other Sources in the Get External Data area and select From Microsoft Query. The Choose Data Source dialog box opens.
4. On the Databases tab, select the ODBC data source you created and click OK. The Excel Query Wizard opens.
5. In the list of available tables and columns, select the columns you want to query.
6. Click Next.
7. Continue through the Query Wizard and set any options for filtering and ordering data.
8. At the end of the wizard, select what to do next with the data.
 - ◆ Select Return Data to Microsoft Excel to import data to the workbook.
 - ◆ Select View data or edit query in Microsoft Query to perform more complex data queries.
9. Click Finish.
 - ◆ If you chose to return data, the data is imported to Excel.
 - ◆ If you chose to edit the query, the Microsoft Query Editor opens.

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