

Helix ALM Microsoft Outlook Integration

Helix ALM supports integration with Microsoft Outlook. See [Third-Party Integrations](#) for supported versions.

This article includes information about [installing the integration add-in](#), [configuring the add-in](#), [license usage](#), [accessing projects](#), [creating items from emails](#), and [attaching emails to items](#).

Installing the add-in

During installation, you are prompted to install the Outlook add-in if Outlook is installed on your computer. The add-in is automatically installed in the same directory as the Helix ALM Client.

When you start Outlook after installing the add-in, a Helix ALM menu and toolbar are added to Outlook. If the menu and toolbar are not available, refer to the Microsoft Office Outlook help for information about enabling add-ins.

Configuring add-in settings

You can set your preference for connecting to Helix ALM manually or automatically when Outlook starts.

1. In Outlook, choose Helix ALM > Settings.
2. Select an option for what the add-in should do when Outlook starts.
3. Click OK to save the settings.

License usage

A Helix ALM license is used when the Outlook add-in connects to a Helix ALM project. One license is used if you are connected to the same project in the Helix ALM desktop client and a third-party add-in at the same time. You use an additional license if you also connect to the project from another Helix ALM client or third-party application.

Make sure to [disconnect Outlook from Helix ALM](#) when you finish working with a project. This is important if your team uses floating licenses because you could be using multiple licenses and preventing other users from logging in.

Accessing Helix ALM projects

Before you can add emails from Outlook to a Helix ALM project, you must connect to the Helix ALM Server and project. You can also switch projects, connect Outlook to a different server, and disconnect Outlook from the Helix ALM Server.

Connecting to a Helix ALM Server

1. In Outlook, choose Helix ALM > Connect to Server.
2. Select the Server you want to connect to or click Setup if you need to add a server. See the Helix ALM help for information about [adding server connections](#).
3. Enter your Username and Password or select Use single sign-on to log in with your network credentials.
4. Click Connect.

5. Select a Project. Click Refresh if the project you want to connect to is not listed.

6. Click OK. You are connected to the project.

Switching projects

To switch to a different project, choose Helix ALM > Switch Project, select the project, and click Switch.

Connecting to a different server

To connect to a different server, choose Helix ALM > Connect to Server. Click Yes when prompted to close the open project. Select the server, enter the login information, and click Connect.

Disconnecting from a server

To log out of a project or disconnect from a server, choose Helix ALM > Logout and Disconnect. Click Yes when prompted to close the project and server connection.

Creating Helix ALM items from emails

You can create a Helix ALM item from Outlook emails. The email subject is used as the item summary and the email body is used as the item description.

1. In Outlook, select an email and choose Helix ALM > Create Item from Email.
2. Select the type of item to create and click OK.
3. Enter any additional item information. For example, you may want to change the Found By user to the customer who sent the email.
4. Click Add. The item is saved and added to the project.

Attaching emails to Helix ALM items

If you receive an email with information that applies to an existing Helix ALM item, you can attach the email to the item.

Note: Email tracking must be enabled for the project before you can attach Outlook emails to items. Ask your Helix ALM administrator for information.

1. In Outlook, select an email and choose Helix ALM > Attach Email to Item.
2. Select an item Type.
3. Select the item to attach the email to and click Add. The email is attached to the item.

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