

T-Plan Reporting



Summary

This document outlines some of the options available for reporting on data held within T-Plan. It also covers some of the configuration settings that can be applied to further enhance the user experience, and security, with custom views within the T-Plan Incident Management System.

The areas covered in this document are as follows:

1. Reporting Options
 - Office Export
 - ❖ Word
 - ❖ Excel
 - ❖ XML
 - SSRS Reports
 - Crystal Reports
2. Adding Custom Report Templates
3. IMS View Configuration
 - Incident List
 - Statistics
 - Raising/modifying incidents

Details

1. Reporting Options

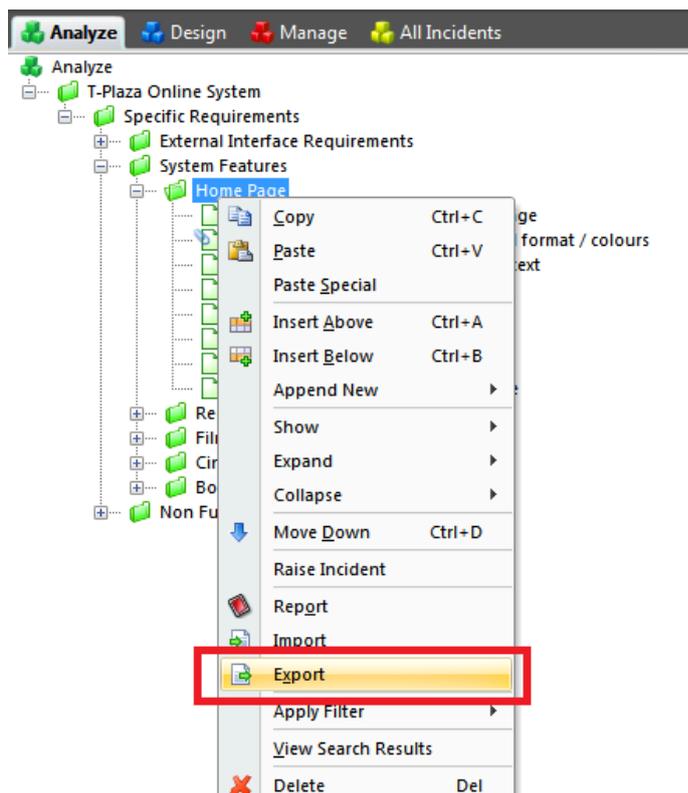
1.1. Office Export

T-Plan provides the ability to export data into the Microsoft Office formats of Word, Excel and XML. It utilizes the Office XML schema to transform data via a style sheet which can be customized according to the users requirements (custom style sheets are not covered in this document).

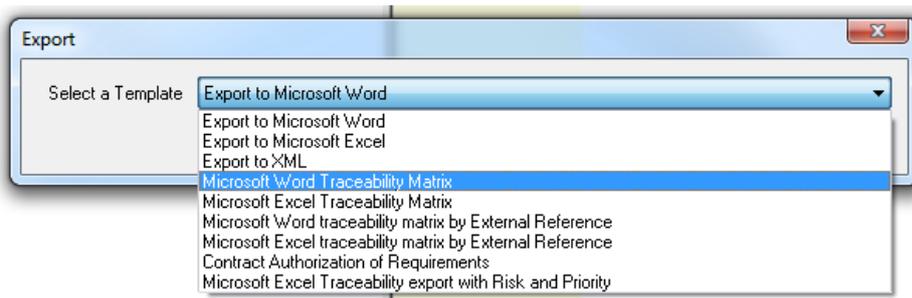
This functionality is provided in the form of an extension. The extension is installed and activated by default as part of the T-Plan installation.

With the extension installed you will find the “Export” option within the right mouse click menu on all T-Plan hierarchy entities. This option is context sensitive producing targeted reports containing only data from the currently selected entity and its children.

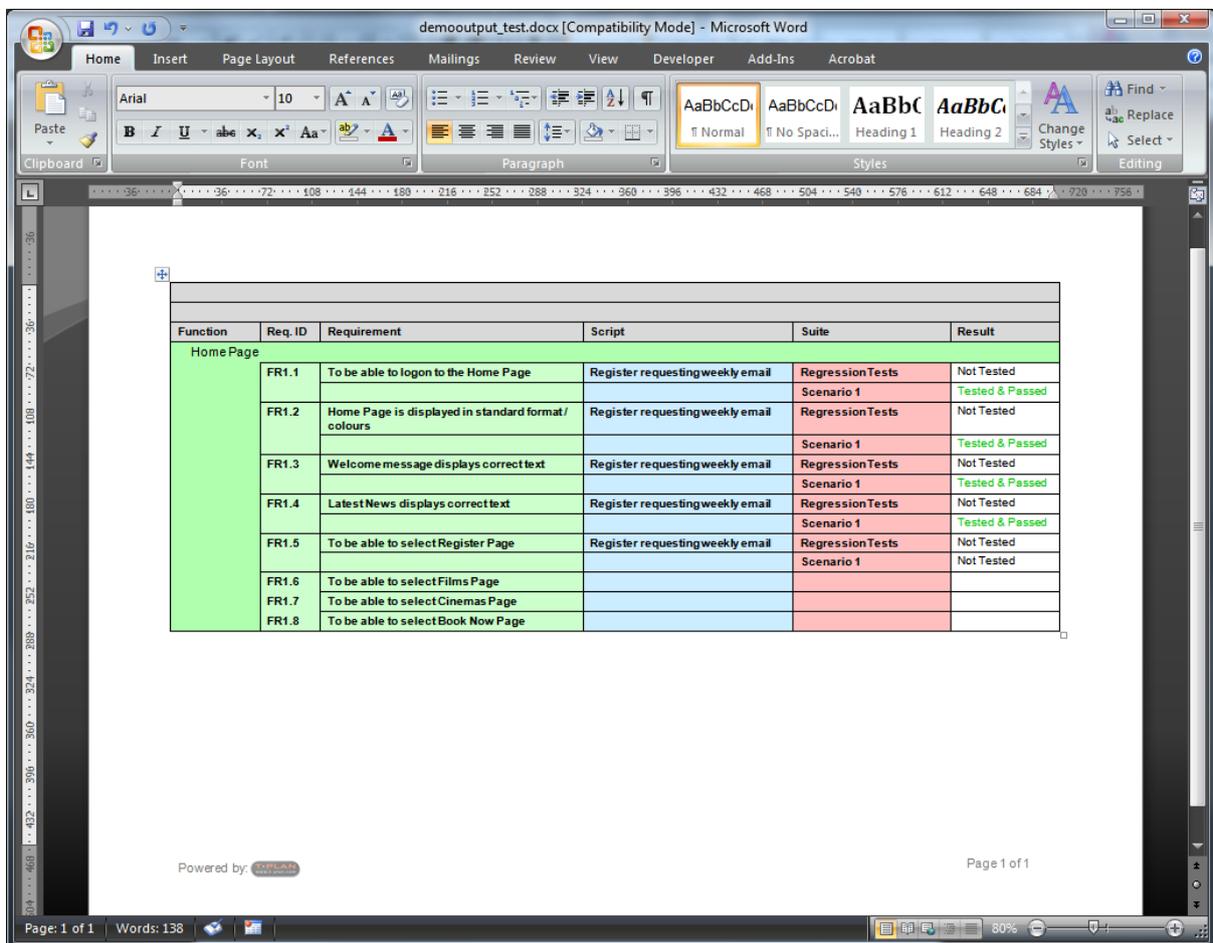
The following example is reporting specifically on the Home Page Function in the Analyze module:



Once the export option has been selected you will be presented with a dialog allowing you to select an export template.



Having selected the desired export template, select a save location and the export is processed. Below is an example output of the “Word Traceability Matrix” export from the Analyze module which shows the path of each requirement through to its execution results.



This second example, the “Excel Test Set Summary”, is a similar dataset exported from Manage based on the Script status, giving each Step result.

Suite	Total Scripts	Test Case Name	Status	Total Steps	Steps	Name	Status
Scenario 1	4	1 View list of cinemas	Complete/Failures	5	1	Logon	Tested & Passed
					2	Select	Tested & Passed
					3	Region	Tested & Passed
					4	Cinema	Tested & Passed
					5	Finish	Tested & Failed
		2 Find performance times & check availability	Not Started	4	1	Date	Not Tested
					2	Film	Not Tested
					3	Time	Not Tested
					4	Tickets	Not Tested
		3 Book tickets	Not Started	5	1	Booking details	Not Tested
					2	Proceed	Not Tested
					3	Card details	Not Tested
					4	Confirm	Not Tested
					5	Return	Not Tested
		Register requesting weekly email	In Progress	8	1	Logon	Tested & Passed
					2	Select	Tested & Passed
					3	Details	Tested & Passed
					4	Register	Not Tested
					5	Confirm	Not Tested
					6	Return	Not Tested
					7	Check1	Not Tested
					8	Check2	Not Tested
Totals	4			22			

If you select the XML export option from the drop down list you will be presented with a dialog allowing you to choose the data that is to be included in the export.

Section	Property	Value
Fixed Properties	Name	✓
	Description	
	Extended ID	
	Version	
	Number	
Notes	Notes	✓
Attributes	Design Time	
	Risk Factor	
	Run Time	
	Scheduled Start	
	Priority	
	Reference Data Type	
	Test Data Type	

1.2. SSRS Reports

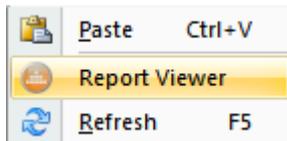
T-Plan also provides the capability of running reports through SQL Server Reporting Services (SSRS).

This again is made possible through an extension and therefore can be configured and updated outside of the main T-Plan product suite if necessary.

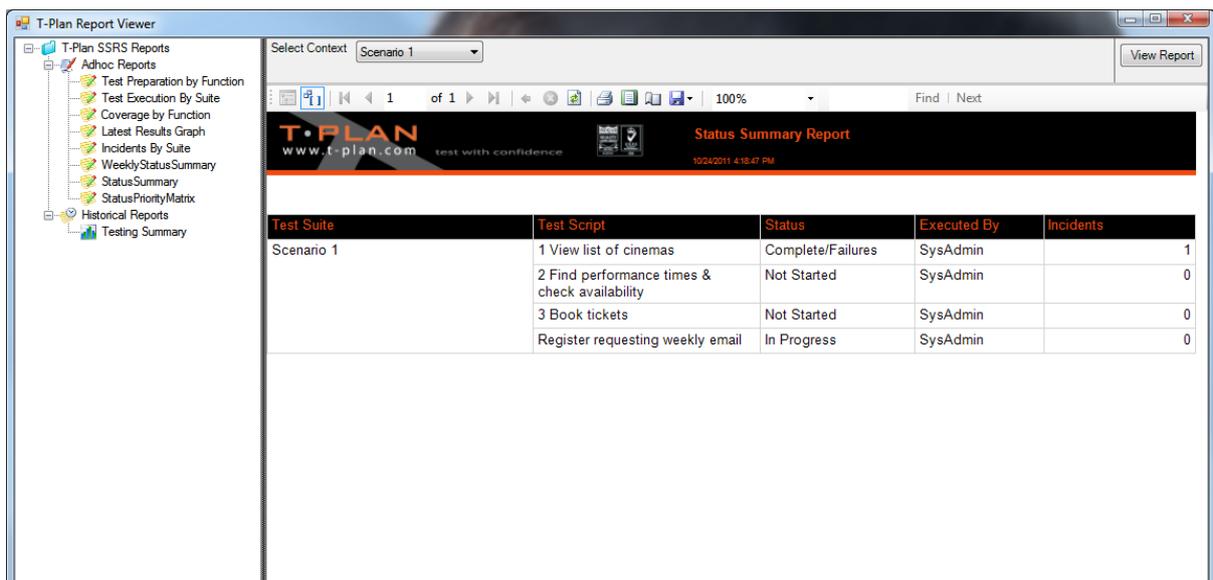
The T-Plan SSRS extension must be configured to point to your existing SQL Report Server. This is achieved using the “Configure” option under the Extension tab of the Ribbon bar to invoke a wizard to guide you through the process.



Once configured the Report Viewer can be invoked from a number of places including the Ribbon bar, as above, and also within the Right mouse click menu across the application;

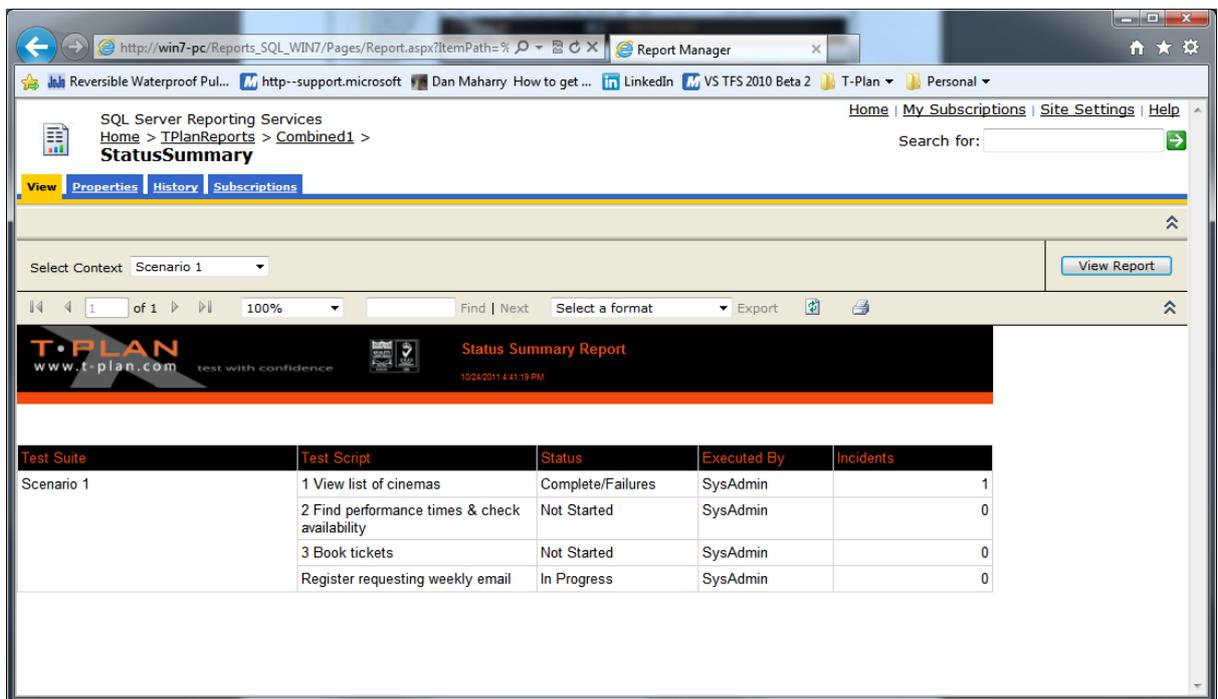
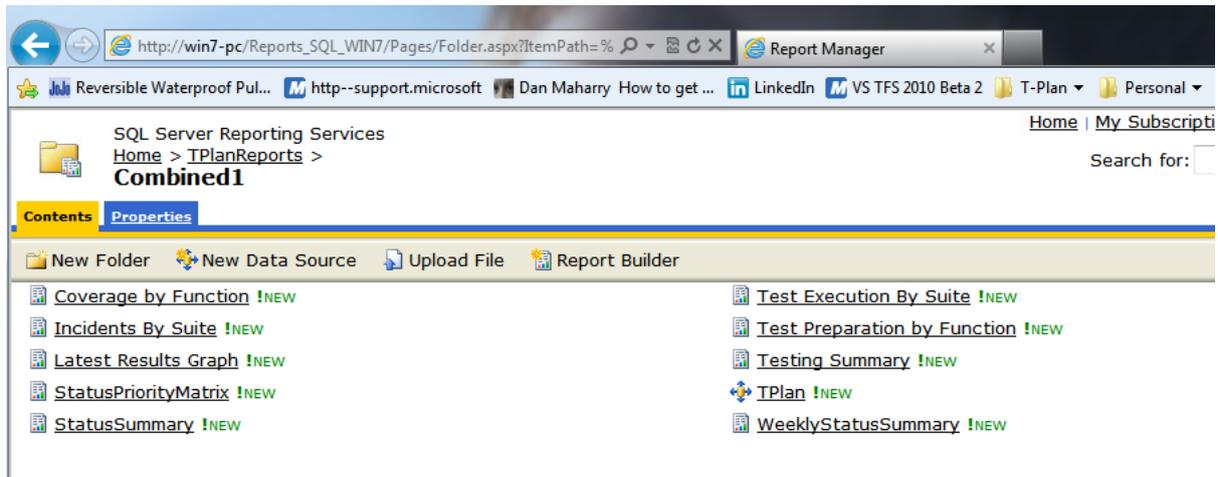


Once the Report Viewer is opened from T-Plan you can select the desired template to use from the left hand pane before viewing the actual report in the right hand window.



Test Suite	Test Script	Status	Executed By	Incidents
Scenario 1	1 View list of cinemas	Complete/Failures	SysAdmin	1
	2 Find performance times & check availability	Not Started	SysAdmin	0
	3 Book tickets	Not Started	SysAdmin	0
	Register requesting weekly email	In Progress	SysAdmin	0

One of the benefits of using the SSRS reports is that they can be viewed in a standalone web browser without the need to access T-Plan directly.



SSRS also provides the built in capability of automating scheduled report generation to either a specified output file location or to specified email addresses. This makes management reporting quick and effective with a chosen report(s) automatically being sent to designated managers or coordinators at regular intervals.

StatusSummary was executed at 26/10/2011 15:13:08 - Message (HTML)

Message Developer Add-Ins Adobe PDF

Reply Reply to All Forward Call Delete Move to Folder Create Rule Other Actions Block Sender Not Junk Track in CRM View in CRM Set Regarding View Regarding Categorize Follow Up Mark as Unread Find Related Select

From: David.Sharman@T-Plan.com Sent: Wed 26/10/2011 15:13
 To: David Sharman
 Cc:
 Subject: StatusSummary was executed at 26/10/2011 15:13:08



Status Summary Report
10/26/2011 3:13:14 PM

Test Suite	Test Script	Status	Executed By	Incidents
Scenario 1	1 View list of cinemas	Complete/Failures	SysAdmin	1
	2 Find performance times & check availability	Not Started	SysAdmin	0
	3 Book tickets	Not Started	SysAdmin	0
	Register requesting weekly email	In Progress	SysAdmin	0

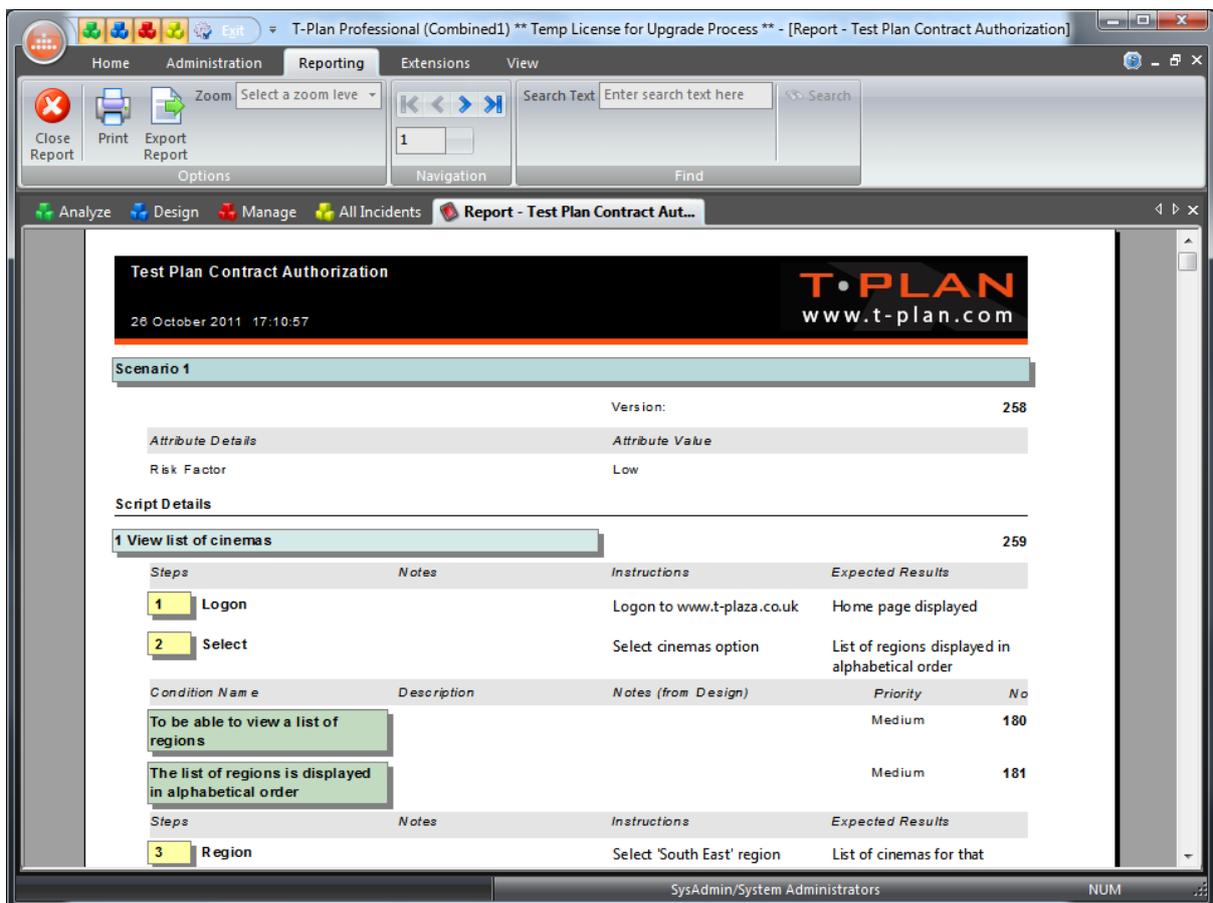
The report is accessible at the following address:
<http://win7-pc/ReportServer/SQL/WIN7?%2fTPlanReports%2fCombined1%2fStatusSummary&statid=3A90BAEAD8B14090B6026AB159A84A2A&rs%3aParameterLanguage=en-GB>

1.3. Crystal Reporting

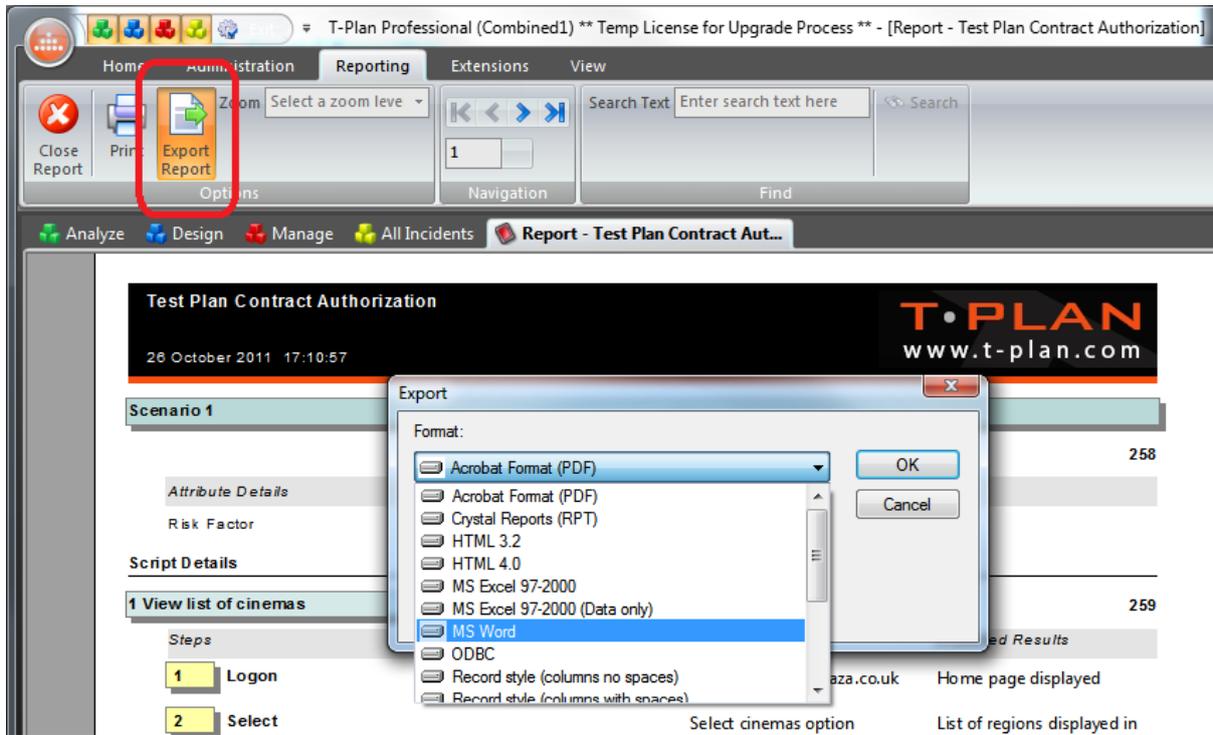
T-Plan provides over 70 different reports in the form of Crystal templates. These are available throughout different areas of the T-Plan applications and offer various levels of information in a range of formats.

Again accessed from the context sensitive right click menu by selecting “Report”, with the subsequent list of templates available in the drop down list dependant on your current location and context within the application.

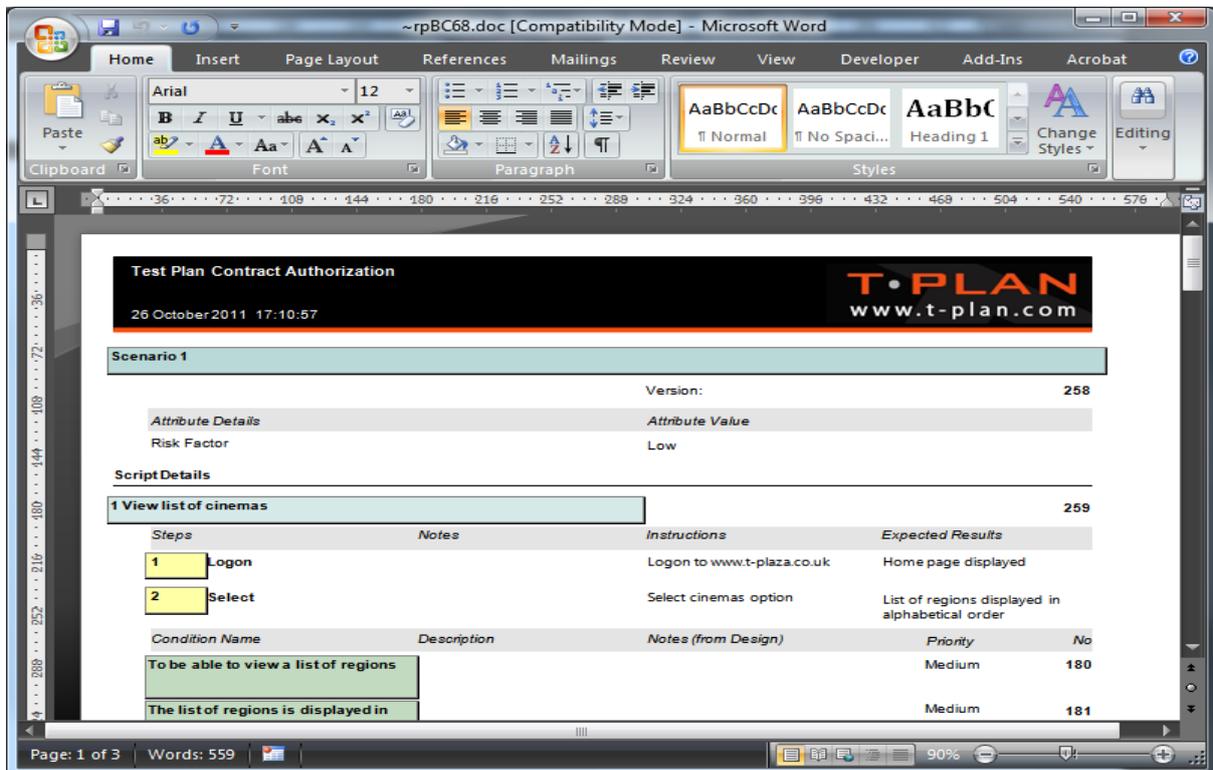
The following example is the “Test Plan Contract Authorization” report generated from the Design module. It provides a ‘Sign Off’ section at the end of the report such that you can obtain approval of the work to be undertaken.



Once generated in Preview mode the users have the ability to Print or to export this template, via the Ribbon bar, into a variety of formats determined by those available on that PC.



The resulting file will retain all of the formatting of the Crystal template as viewed within T-Plan but will now be editable within the target application, such as Word in this example, as below:



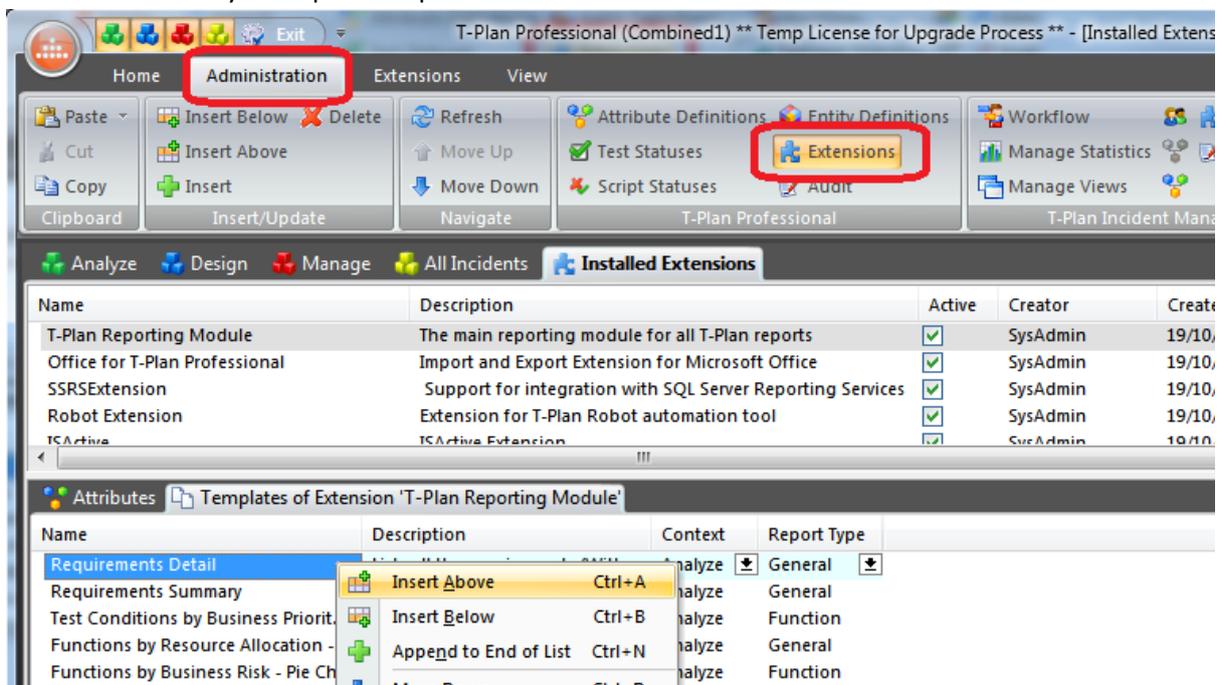
2. Adding Custom Report Templates

All of the reporting methods already mentioned in this document offer the ability to add custom report templates in exactly the same way.

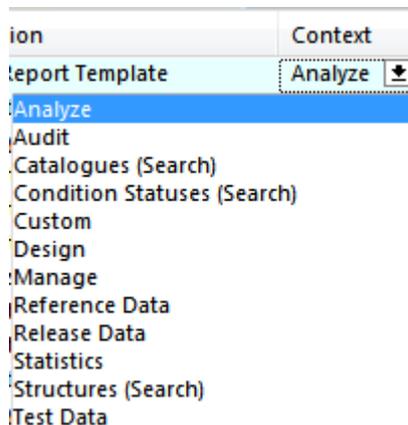
The report templates themselves must be created independently of T-Plan to produce the relevant file i.e .rdl for SSRS, .xslt for Office, .rpt for Crystal.

Once the custom report template has been created you can add it to the relevant extension within T-Plan as follows:

1. Open the Extensions list, available under the Administration tab of the Ribbon bar
2. Select the required reporting extension from the top pane
3. Right click in the lower pane and select either Insert Above/Below or Append to End of List
4. Browse to your report template file



5. Set the Context for the report using the drop down list



6. Set the Report Type, if needed, using the drop down list.

3. IMS View Configuration

T-Plan's Incident Management System (IMS) can be configured to provide custom views for different groups of users. This can be applied in a number of places across the IMS application and also at either a global or user level.

This section will cover the type of customizations that can be applied. The samples used are not necessarily offered as 'best practice' as this is normally customer specific.

Essentially there are two different types of view customization

1. [Restricting the incidents that users can view and therefore update based on set criteria](#)
2. [Customize the columns and attributes that are displayed for the user](#)

The later option is defined and configured under the "Design Mode" feature. The Design Mode is available only to administrators due to the nature of settings being applied globally.

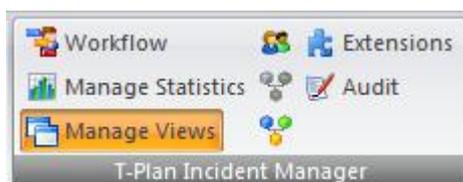
3.1. Incident List

As mentioned above there are two types of customization that can be performed in the main 'Incident List' window. Taking the first option, restricting the incidents that users can view and therefore update, this is achieved by setting up 'Views'.

Views are based on a filter query causing anything that falls outside of that query to become invisible to the user. Once views have been defined they are then associated with the Groups of users that can access IMS.

For example the "Managers" group may need to see every incident whereas a "User Community" group could be restricted to only view approved 'Change Request' items.

Views are configured by Administrators by selecting the Manage Views option within the Ribbon bar:

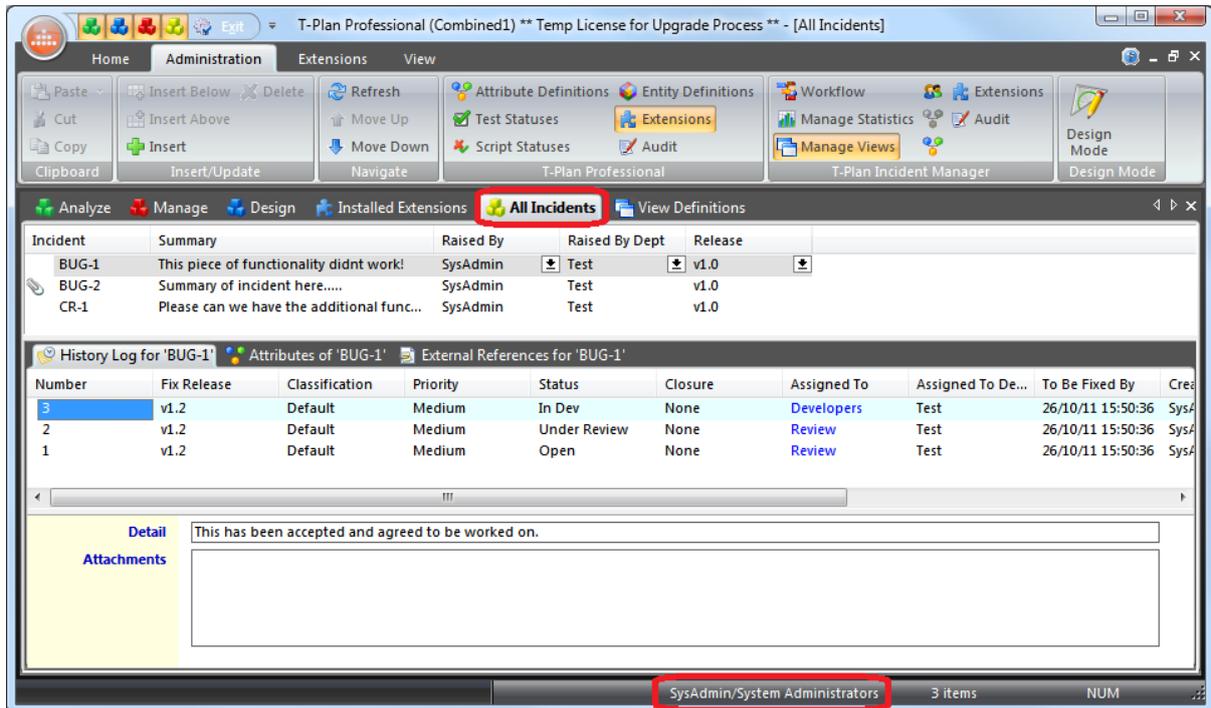


The following shows the defined views in the top pane and the Groups that have been associated with that view in the lower pane. Here you can see that the "All Incidents" view has been linked to the System Administrators group:

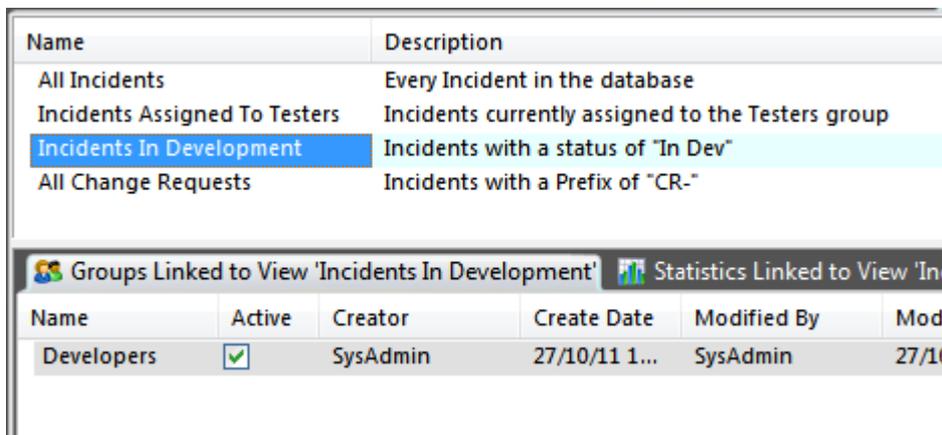
Name	Description
All Incidents	Every Incident in the database
Incidents Assigned To Testers	Incidents currently assigned to the Testers group
Incidents In Development	Incidents with a status of "In Dev"
All Change Requests	Incidents with a Prefix of "CR-"

Groups Linked to View 'All Incidents'		Statistics Linked to View 'All Incidents'		
Name	Active	Creator	Create Date	Modified By
System Administrators	<input checked="" type="checkbox"/>	SysAdmin	19/10/11 1...	SysAdmin
Managers	<input checked="" type="checkbox"/>	SysAdmin	19/10/11 1...	SysAdmin
Review	<input checked="" type="checkbox"/>	SysAdmin	19/10/11 1...	SysAdmin

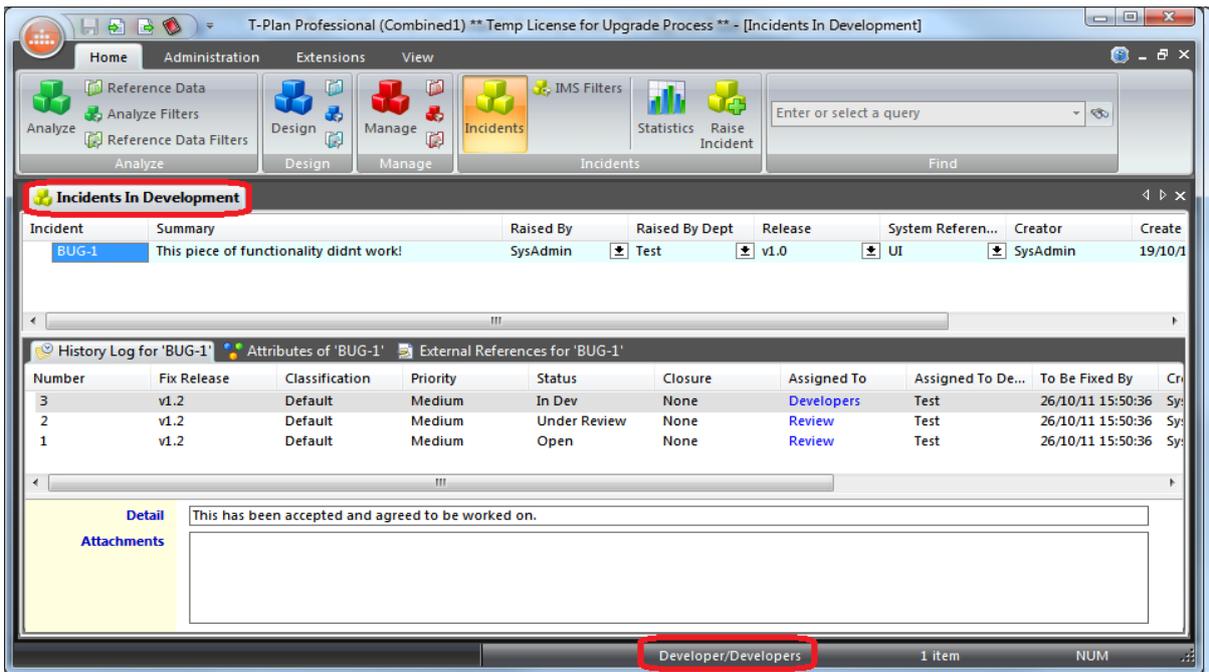
The following shows the All Incidents view in action. Notice the tab displays the currently applied view name. As long as I have sufficient permissions I can now update the incidents in this list.



Here you can see we have created a view to display only incidents that are currently in the status of "In Dev" which we have assigned only to the Developers group.



When we log into IMS as a developer you can see that the view is automatically applied and the incident list is restricted. This means that I can now only work on BUG-1 as it is the only one available in this view.

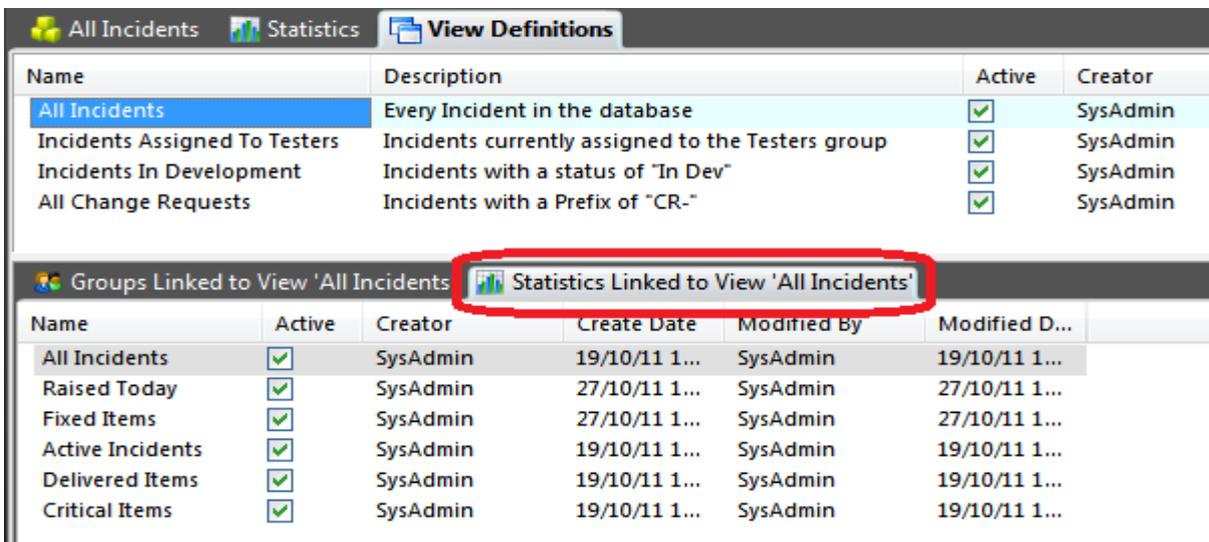


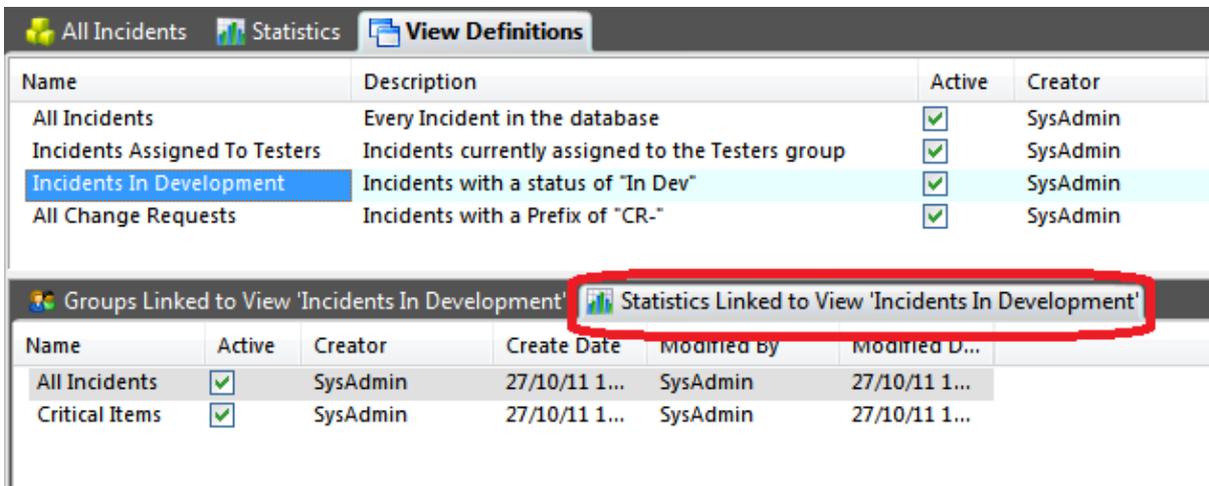
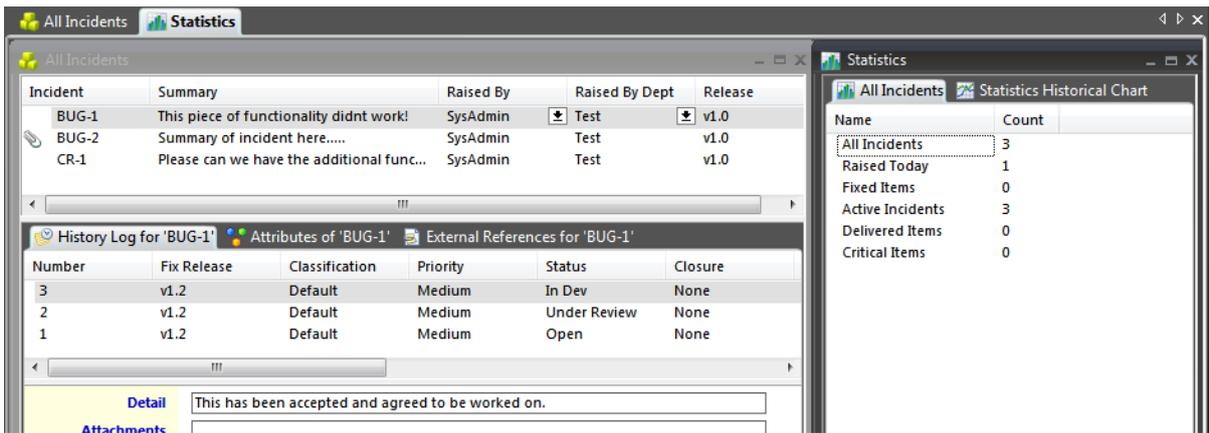
3.2. Statistics

Each of the defined Views can also be associated with a statistic to display a subset of statistical information, such as counts, again based on the current view. This means that not only can each Group of users be provided with custom targeted views on the actual incidents but also on the associated statistical information.

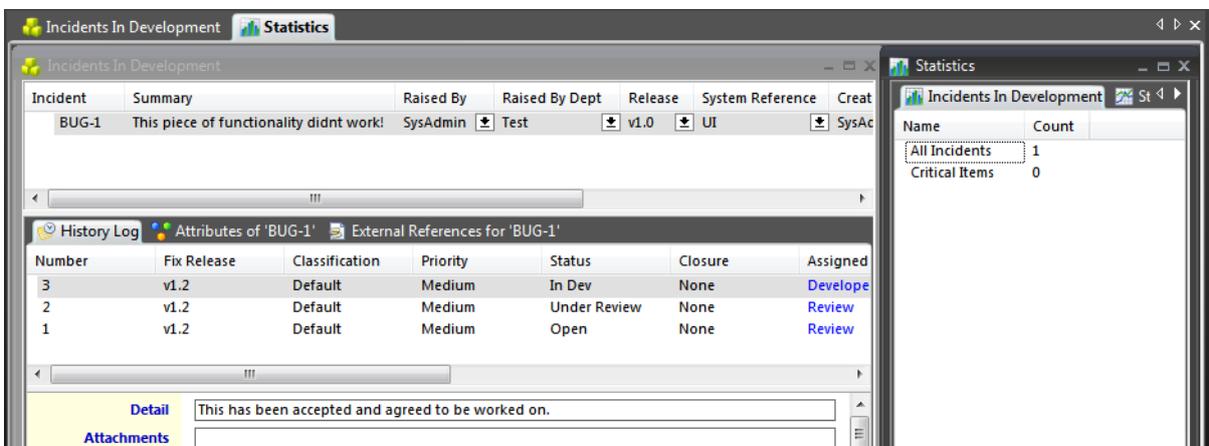
For example, the view assigned to the development team may only need statistical information relating to 'total count' and 'critical items' compared to that of the "All Incidents" view which may need to be broken down to more levels i.e. counts for delivered items, fixed items, overdue items, raised this week, etc.

Below you can see the Statistics being linked with the All Incidents view compared to that of the In Development view and then how that manifests for the users:





Now when logging on as a developer I only see the designated statistics and notice their count has also been adjusted according to the applied view:



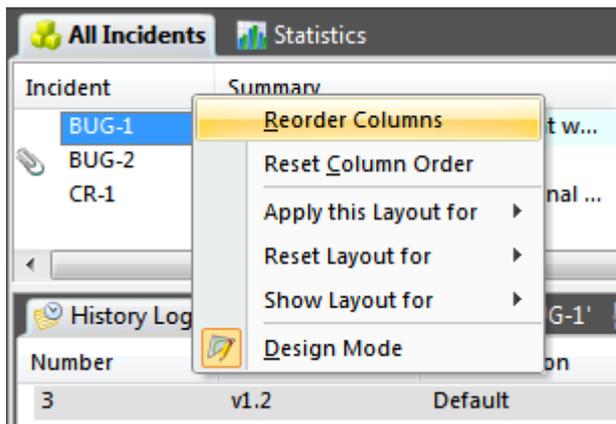
3.3. Design Mode

The second type of customization that can be performed in the Incident list is that of the columns visible in each of the panes.

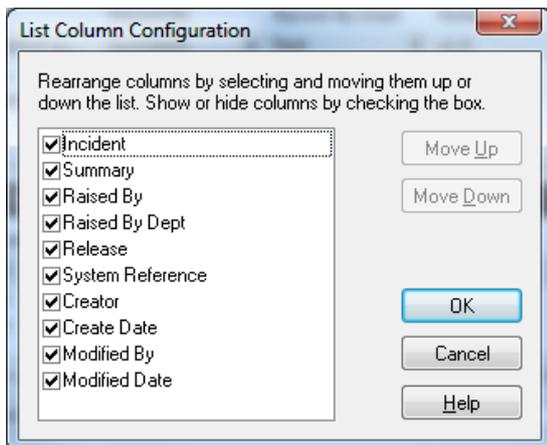
This type of customization is achieved using the “Design Mode”.

Design Mode allows an administrator to configure the desired columns, using the right click “reorder columns” option, before selecting the Groups to which that setting should apply.

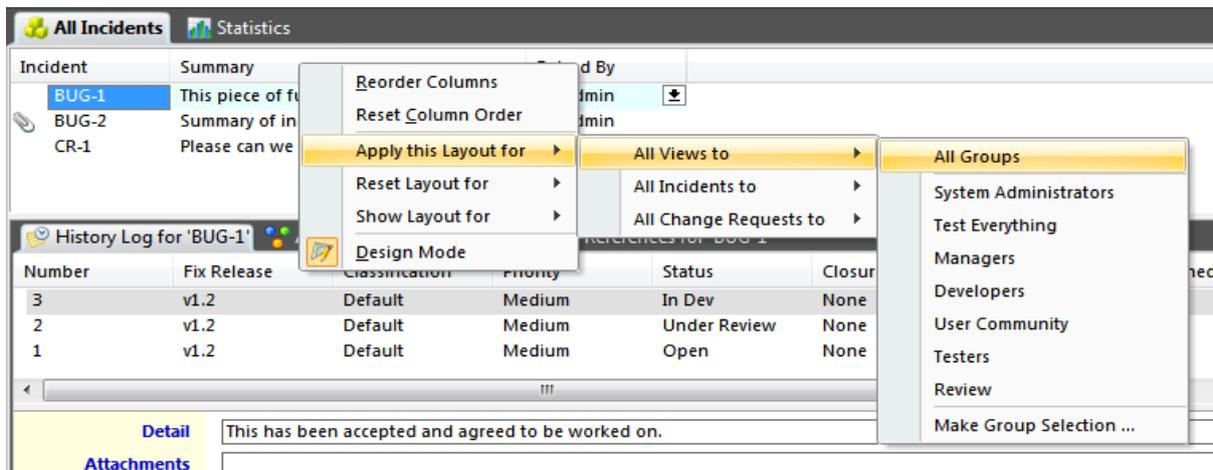
In order to perform this action the Administrator must first right click the column header and activate the Design Mode feature.



The resulting dialog allows you to select which columns will be visible and the order in which they appear:



Once you are happy with the selection you must right click the column headers again to invoke the “Apply this layout for” option before selecting the chosen Groups



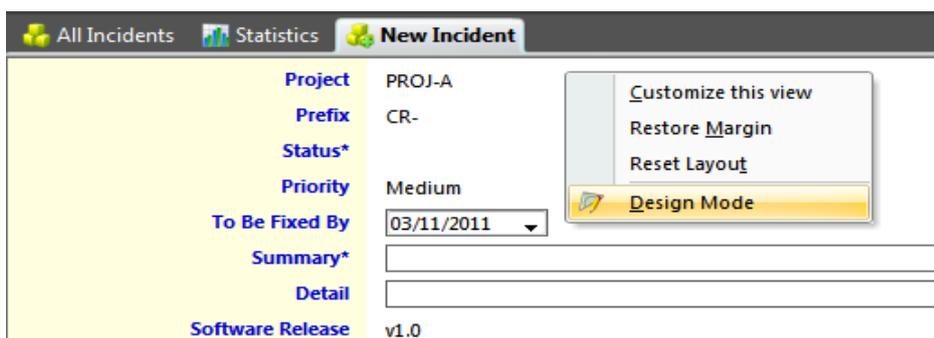
This action can be performed against all data screens where columns are present. It can also be applied to all attribute windows across the applications, as discussed below.

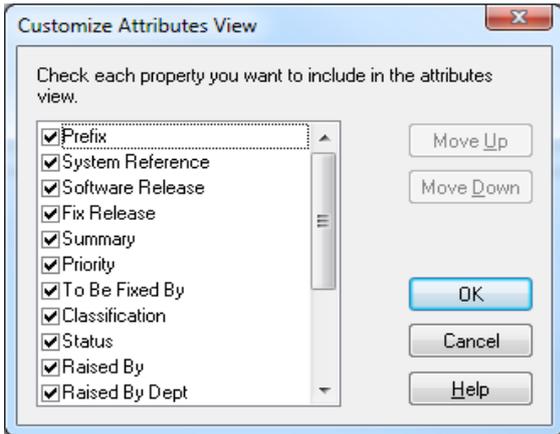
3.4. Raising/Modifying Incidents

As with the customization of the column headers above, the customization of the new incident and history log windows is also achieved through the use of the Design Mode as it is essentially an attribute list.

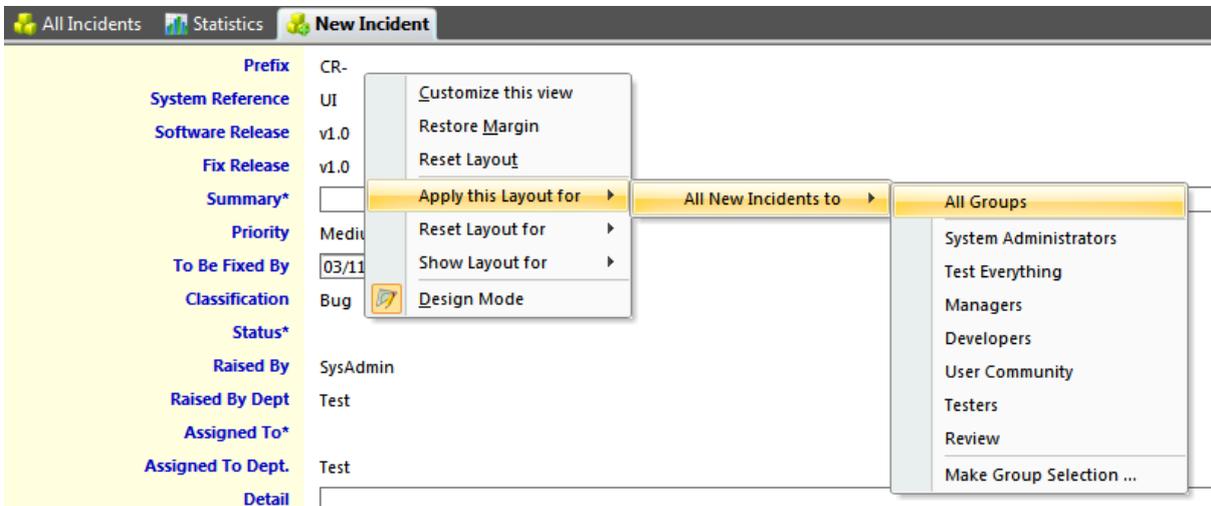
The benefits of this mean that you are able to control what information is logged at any/each stage of the incidents lifecycle by controlling the list of attributes that are visible to the user.

Once Design Mode is activated you are able to “Customize this view” using the selection pick list:





Once the attribute list has been set appropriately you can then choose who you wish to apply the view to:



In addition to the above options, when you apply this setting to the “History Log” screen you have the ability to set a different view against each Status as follows:

