Report Scheduling Tutorial

OWdmateyou'll learn

- Prerequisites
- Configure stowdolpropertyrienable scheduled reports
- Tips How to configure multiple scheduled reports
- References low to optimize the usage of scheduled reports

Overview

One of the use cases for the Scheduled Reports feature of Xporter could be the health check of the QE efforts within a sprint, especially for stakeholders who do not yet have access to Jira. That would have the benefits of consolidating the important metrics and presenting them in the clear format directly to the stakeholder inbox.

In this tutorial, we will go through the Scheduled Reports prerequisites and configuration for that use case.

Prerequisites

• To make the templates available for scheduling, you need to ensure the "Scheduled Reports" value is present in the Scope field of each template.

Name*		
Template identification when creating a report Description	255 character	s remaining.
Brief description of the template	500 character	s remaining.
Scopes		
Agile Boards × Agile Releases × Automation for Jira × Bulk Export × JSD Queues × JSD Request Detail × JSD Request List × Schedule Reports × Single Export × Structure × Workflow Post Functions × Xporter Reports × Single Export × Structure ×		0 -
This template will be available on these scopes		
File		
Choose File		
Choose template file		
> Advanced		
	Update	Cancel

Scheduled Reports can be used at the Global level or at the Project one. In this tutorial, we will ٠ focus on the Project level - to enable this feature, you need to navigate through Manage Apps -> Xporter -> Project Settings and adjust the toggle.

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athaoban malagtinan) End new apps Manoge appn SAMP	Project Settings Defen with project with one the Sporter settings or project twel administration. If the Sporter settings are dealered, the Sporter section work Sparter and all the evolved settings or Q	il be ignored. Learn more.		Q Actions ~
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You should then see the Xporter section in Project Settings



Configure scheduled reports

Definition of "QE health" can be subjective, so feel free to customize the number and types of the templates. We will be using Defect Summary, Requirement Report, and Test Runs List. You can only select **1 template per scheduled report**, so we will add 3 items using the " + Add" button above.

The content of the Details section is mostly personal preference. In the Scheduled section, assuming the sprint duration is 14 days and we initiate the configuration a sprint in advance, we can set up the following "Advanced" cron expression to control the frequency: 0 0 12 */14 * ?

Sched	uled
	Cron Type* OBasic Advanced
	0 0 12 */14 * ?
	This is the Cron expression that will decide the regularity of your Scheduled Report

In the Export Data section, we can use the following JQL expressions (please refer to the template content for the full list of supported issue types):

- Defect Summary: issuetype = Bug AND sprint in openSprints()
- Requirement Report: issuetype = Story AND sprint in openSprints()
- Test Runs List: issuetype = "Test Execution" AND sprint in openSprints()

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Data		
Export Data* 🖲 JQL 🔿 Filter 🔿 Xporter Reports		
issuetype = Bug AND sprint in openSprints()		11
Template		
NewDefectSummary2024-bugsormix		• (?
Filename*	Output Format	
DefectSummaryReport.xlsx	XLSX	~
Filename of exported file		

Since these queries can be useful for direct export and other Jira/Xray features, we recommend saving it as filters.

Lastly, in the Actions section, we will add the "Send Email" action with the list of stakeholders:

Configure scheduled action



In the final state, the Scheduled Reports section of your project settings should look like this:

Schedule	ed Reports					
Q Search	Al	*				+ Add
Status	Name	0 Scheduled	Export Data	Actions	Last Modified	Show 10 entries Operations
	DefectSummary DefectSummaryReport.alsx	ADVANCED 0 0 12 */14 * ?	D → D AQL: issuetype = Bug AND sprint in Template: NewDefectSummary2024-bugs	Seed Deal	 2024-02-08 14:38 	0 ~
	RequirementReport RequirementReport.dsx	ADMANCED 0 0 12 */14 * ?	AQL issuetype = Story AND sprint L. Template: Update/Rep:Overviewian222	Send Email	 	0 ~
<u>~</u>	TestRunsList TestRunsReport.slox	ADVINCED 0 0 12 */14 * ?	A24 isoetype = "fest becultor" A Template: TestRunslan2024	Send (mail	 2024-02-08 14:41 	0 ~
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Tips

- To see the history and success/failure details, you can navigate to Manage Apps -> Xporter -> Xporter Audit Logs.
- You can minimize the email clutter by enabling this toggle in the Configuration section.

Configuration	
Condition	\mathbf{O} ×
	The condition will evaluate if you have at least one issue to export in order to generate the report

- Each scheduled report can support multiple Actions, so you may choose to store files in a server in addition to the email delivery.
- Meaningful report names help with file management in the long run.

References

- Xporter documentation
- Cron expressions for Jira DC