

# Report Scheduling Tutorial



## What you'll learn

- Prerequisites
- Configure scheduled reports
- How to properly enable scheduled reports
- Tips
- How to configure multiple scheduled reports
- References
- How 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.

### Edit Template

Name\*

Template identification when creating a report 255 characters remaining.

Description

Brief description of the template 500 characters 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 ×

This template will be available on these scopes

File

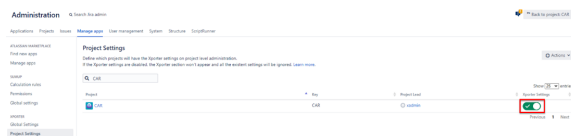
Choose File

Choose template file

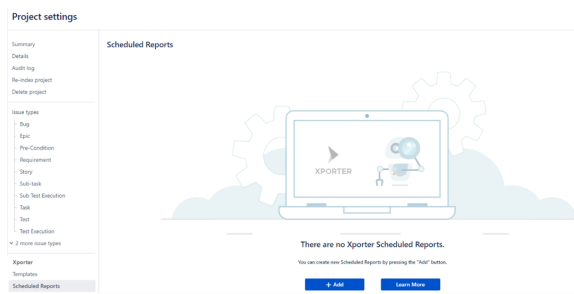
Advanced

Update Cancel

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



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 \* ?

Scheduled

Cron Type\* ☐ Basic ☒ 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()`

Export Data\* ☒ JQL ☐ Filter ☐ Xporter Reports

`issuetype = Bug AND sprint in openSprints()`

Template

NewDefectSummary2024-bugsormix

Filename\* DefectSummaryReport.xlsx

Output Format 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

Action: Send Email

Send a report by email

To:\* stakeholder1@email.com, stakeholder2@email.com

Separate each element with a comma. (Emails, User groups, mappings, Usernames or User Ids)

Cc: myself@email.com

Separate each element with a comma. (Emails, User groups, mappings, Usernames or User Ids)

Bcc:

Separate each element with a comma. (Emails, User groups, mappings, Usernames or User Ids)

Subject: Bi-weekly - Defect Summary for Active Sprint

Default filename: ☒ On ☐ Off

Choose if the file that will be attached will have the same filename defined below.






















Use default body: ☐ On ☒ Off

Choose if the body that will be attached to email will have a custom description.

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

Scheduled Reports

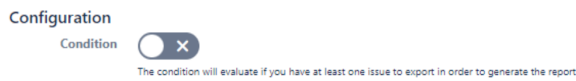
All
+ Add

Status	Name	Scheduled	Export Data	Actions	Last Modified	Show <span>18</span> entries
	<b>DefectSummary</b> DefectSummaryReport.xlsx	ADVANCED 0 0 12 */14 * *	 →  J201 - TestSuite - > Reg. J201 - SPH1 - > ... Template: TestRunSummary20204-Regis...	Send Email	 2024-02-08  14:30	 
	<b>RequirementReport</b> RequirementReport.xlsx	ADVANCED 0 0 12 */14 * *	 →  J201 - TestSuite - > Reg. J201 - SPH1 - > ... Template: J201-TestRunSummary20204-Regis...	Send Email	 2024-02-08  14:30	 
	<b>TestRunList</b> TestRunReport.xlsx	ADVANCED 0 0 12 */14 * *	 →  J201 - TestSuite - > Test Definition - > ... Template: TestRunList20204	Send Email	 2024-02-08  14:41	 

Previous 1 Next

## 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.



- 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](#)