Chapter 10

10 Reports

In this chapter you will become familiar with all the SpectrumSCM reports - how to create them and the meaning and use of the information in these reports. You will also learn how to personalize your reports and save personalized versions as well has how to create a custom report and install it in the system

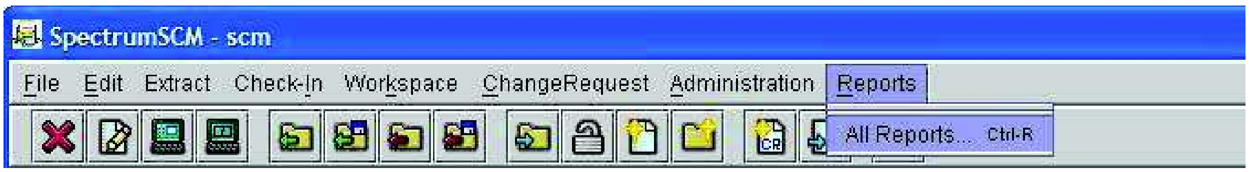
The Spectrum system provides comprehensive set of pre-defined reports. SpectrumSCM provides all the reports necessary for the system to be as useful as possible right out of the box. The following list describes the basic reports that are packaged with the **SpectrumSCM** system.

- **Change Request Report**: Show the details of the specified change request.
- **CR Dependency Report:** Show the dependencies of the specified change request.
- **CR WBS Report:** Summarizes the parent-child and peer-to-peer dependencies for a selected CR
- **CR by State, Severity and/or Date**: Summarize CRs by State, Severity and/or creation date.
- **CR by their Attribute Values - Tabular:** Summarize CRs by their attribute values and list the summary information in tabular format.
- **CR by their Attribute Values - Detailed:** Summarize CRs by their attribute values and list their detailed information in CR Report form.
- **Outstanding Change Request Report:** Show the list of all active change requests.
- **Specific Creator and Period Change Request Report:** Show the change requests created by a user within specific period.
- **User Change Request Report:** Show the change requests currently assigned to a user.
- **CR Assign History:** Show the change requests assigned to the specified user within a specified period.
- **Change Requests Assigned to Release:** Show which CRs are assigned to a release.
- **Change Requests Not Assigned to Release:** Show all CRs that are not currently assigned to a release.
- **Files Touched in a Release:** Show which files were modified in a release
- **Files Version Numbers in a Release:** Show the version number of all files in a release
- **File History Summary:** Report all file changes including who made them and when.
- **File History Detail:** Report all file changes including the summary info and the actual code changes.
- **CR File Diff Report:** Show the file changes made under the selected Change Request.
- **File Status Report:** Report the status of all files under a specified directory.
- **User Checked Out Files:** Report all the files currently out for edit by a user or all users.
- **Generic Audit Report:** Compares two generics and reports the differences (common, uncommon, outgoing and incoming files).

- **File History Generic Comparison Report:** Report the branching activity on a file with repsect to its source generic and one other.
- **User Roles:** Report all the users and their roles in a particular project.
- **User Projects:** Report which projects a particular user (or all) is involved in and what roles they hold within those projects.
- **Package Detail Report:** Show the components currently associated with a package and optionally report the file versions that would be extracted.

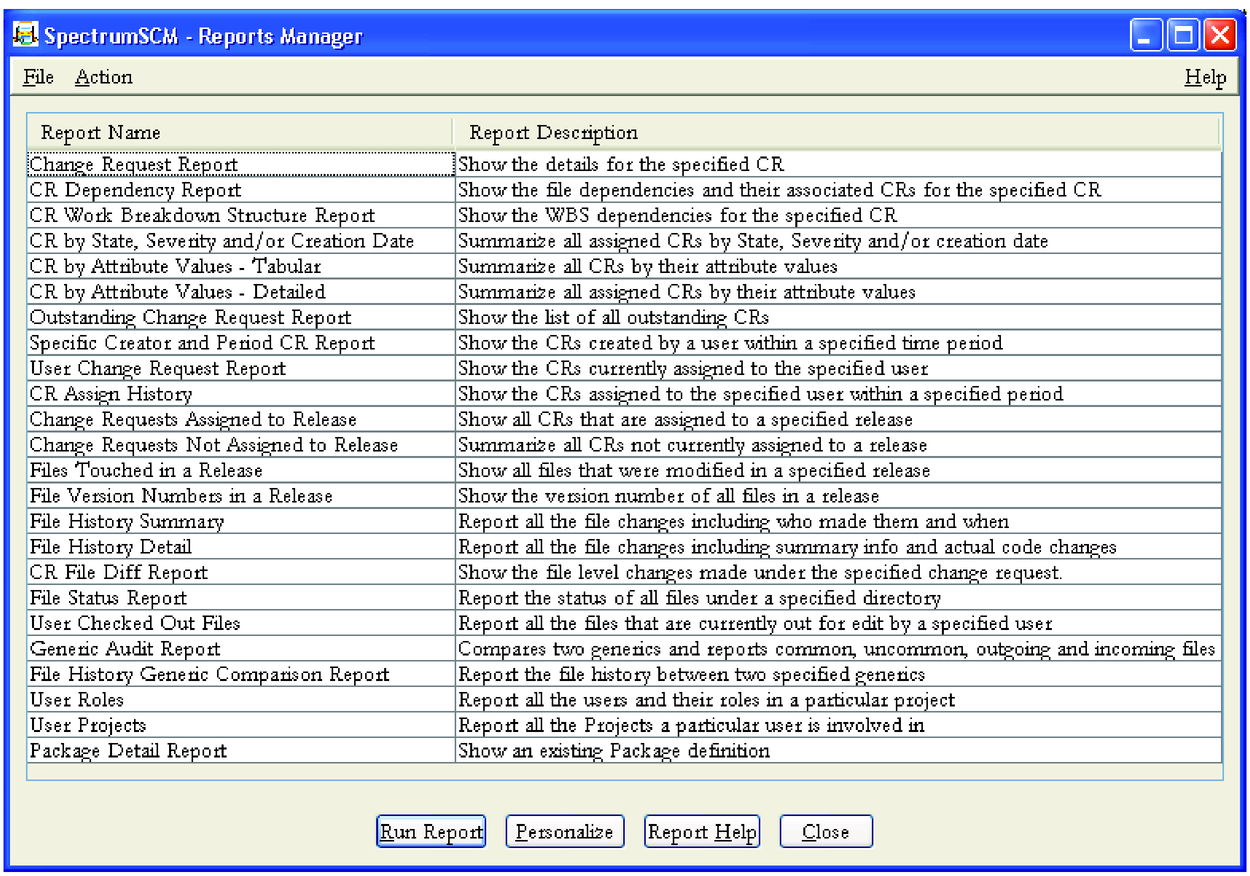
10.1 Running a Report

Access the reports via the **Reports** option on the **Main Screen** menu

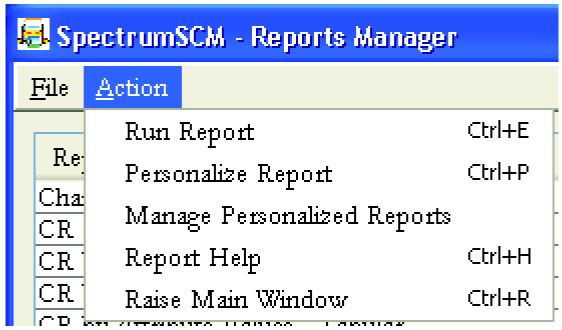


Select Report

Select the report that you desire, a brief description is listed to the right. More report specific help can be displayed by selecting the help button.

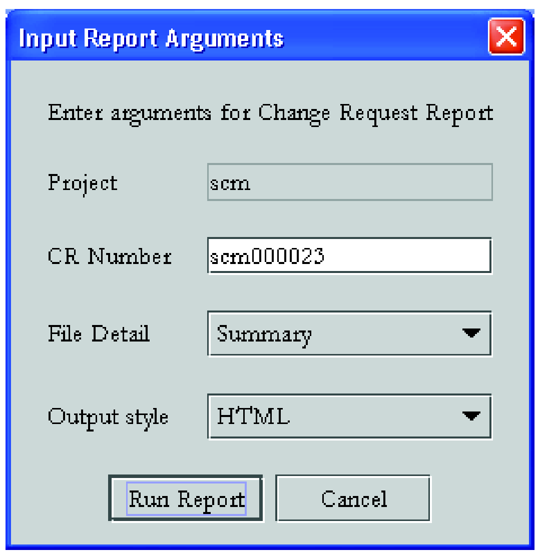


The **Action** menu item offers the same options as on the screen plus an additional option to Manage Personalized Reports (see below for details).



Run a Report

When the **Run Report** button is selected a panel will be presented requesting all of the required input parameters for the chosen report. Some of these will be defaulted to values selected on the main screen. Enter any changes or refinements to the report parameters and run the report. The report will be presented in the Report Viewer. You can output the report either in **HTML or CSV format.**

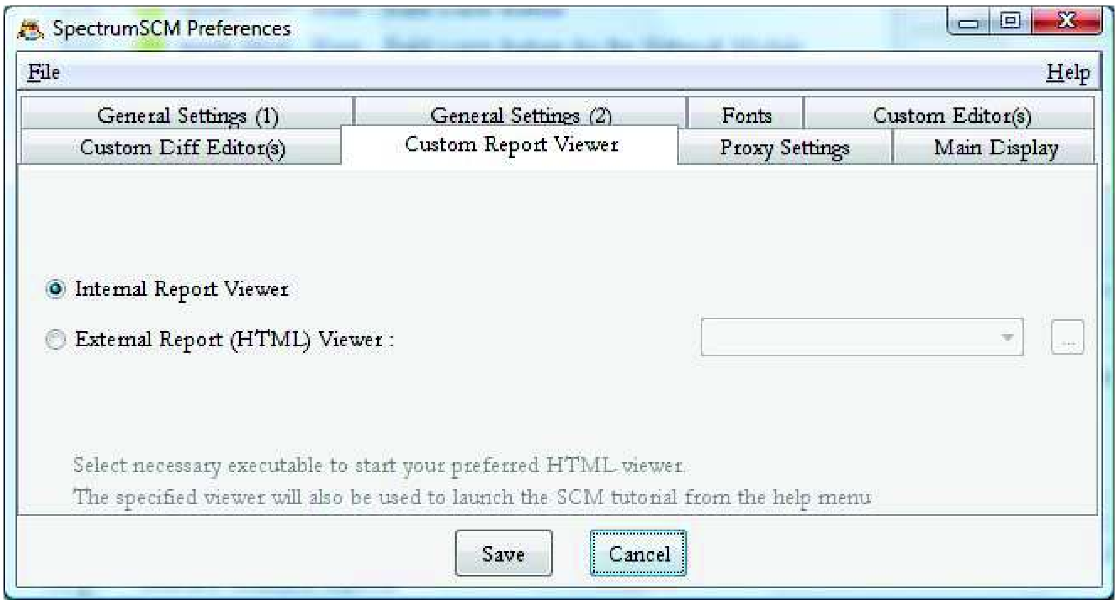


The SpectrumSCM Report Viewer has standard print, save and find capabilities. Under the SpectrumSCM release 2.6 hyperlink functionality was also added to the reports and the report viewer to allow “zoom-in” on items of interest. In the report example shown above, the standard CR Report is run in “Summary” mode which only shows the summary of the files edited under this CR. Selecting on the “summary” hyperlink will switch the report into the “Detail” mode which will show all the file versions created and all the generics/branches affected by those edits.

10.2 Customize the Report Viewer

The default report viewer works fine for all reports, but is limited in functionality outside of printing and simply formatting the HTML output of the reports. The user can elect to set and use a custom report viewer for viewing, printing, mailing or other actions that are outside of the capabilities of the standard report viewer.

To set a custom report viewer, open the Preferences popup (**Edit->Preferences…**) and select the "**Custom Report Viewer**" tab:



In this example, the custom report viewer has been set to Internet Explorer. It could also have been set to Netscape Navigator or some other HTML/web browser. Microsoft Excel and other spreadsheet programs that understand HTML and also table formats (for sorting, filtering and extended data processing) can also be useful choices. On the Windows platform the browse button automatically opens up the browse dialog window in "C:\Program Files\Internet Explorer". Once the customer viewer is set, all report output is sent to the chosen custom report viewer.

To set the viewer back to use the SpectrumSCM report viewer simply set the custom report viewer field to blank.

10.3 Printing and Saving a Report

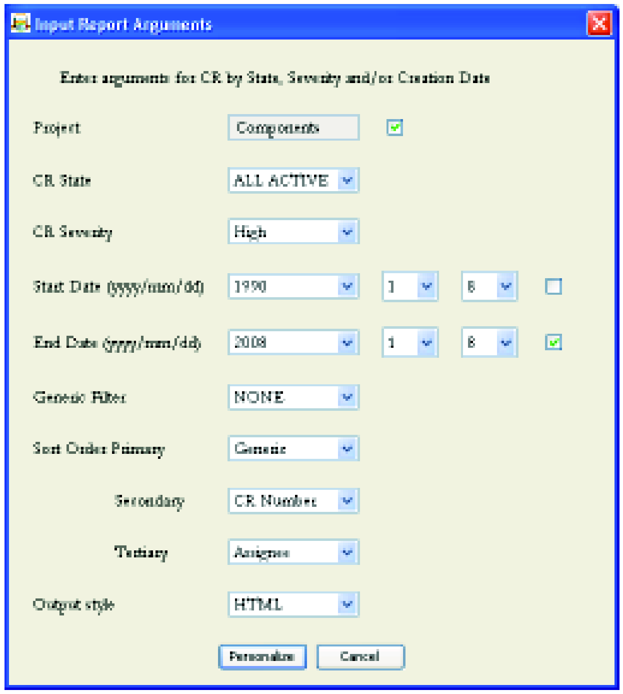
If the default report viewer is used for displaying the report, the report can be **printed or saved** as a HTML, text, or Comma Separated Values (CSV) file through the report viewer.

10.4 Personalizing a Report

Reports can be personalized by selecting the **Personalize Report** button. Personalization allows the user to pre-specify popular reports and assign them to the main screen reports menu. This is very useful for frequently executed reports i.e. for that Monday/Friday weekly status meeting.

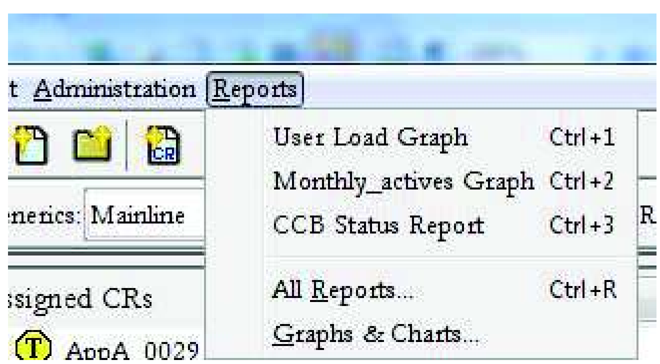
The personalize report button presents an argument panel similar to the one for entering the regular report arguments. If a value is provided directly as a report argument, the value is hard-coded in the personalized report. If a **check box** is available and the user selects it, then the argument value will be retrieved from the main screen selection at the time that the personalized report is executed.

For example, to personalize the CRs by State/Severity report, select the report and (in this case) select the Project and End-Date check-boxes. Then click the **Personalize Report** button.



Click the **Personalize** button to enter the name that you wish to assign to this report and click OK.

This report and all other personalized reports saved by the user can now be executed directly from the main screen reports menu without re-entering parameter values. Quick keys (Control + number 1 thru 9) will execute the first 9 personalized reports.



By checking the Project and "End-Date" during the personalization of this example report, it means that the report will find data on the current project and to the current date when the report is executed. As opposed to always running to the "Components" project and the specified end-date.

10.5 Custom reports

Until the Reports API is available for general use, the only way to create a custom report is to request such a report from Spectrum Software. Report creation is part of your maintenance agreement and most reports can be created and shipped to the customer within 24 hours of receiving the request. Once the report has been delivered to the customer, it's simply a matter of starting the report installer and the custom report will be automatically installed:

```
$ java –jar ReportInstaller.jar
```

The installer automatically installs the report in the custom reports directory and the report itself is immediately available for use on the reports screen. There is no need to restart the server after installing the report. On some operating systems you may be able to simply double click the ReportInstaller.jar file to invoke the installation.