HEXAGON

Q-DAS M-QIS Engine

Report creation and distribution through reporting system – different variants

Reporting-System Case studies

CAS
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Document History

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	09.01.2023	GA	Initial release (QDas-1802)
	24.01.2023	BA	Document review and changes
v-0.8	21.08.2023	LG	New template

CONTENTS

1 Task

Report creation (PDF files) and distribution by the reporting system can be set up in more different ways. Few possible options, but frequently used, will be discussed in the next pages.

The task, or rather the question, is:
How does the reporting system work when several parts are loaded?
How are multiple parts printed together in one PDF file?
How are the emails sent with one PDF file or with multiple PDF files?

The interaction of the various options of the reporting system and the report assignment will be briefly explained here using various examples.

Sequence of a standard reporting system job, without any other special setting:

1. In the Reporting-System a query is loaded.
2. The Query contains different parts, for example 10 Parts.
3. Every single part is loaded separately, is analysed, and printed as a PDF file and maybe be send to the email-recipient(s).

In the coming examples these 10 parts are used. 10 PDF´s are printed and also sent per 10 emails (The extra-printing as PDF is not normally needed for the sending per email and was just activated to explain the topics).

The following wishes might be desired in the real world:

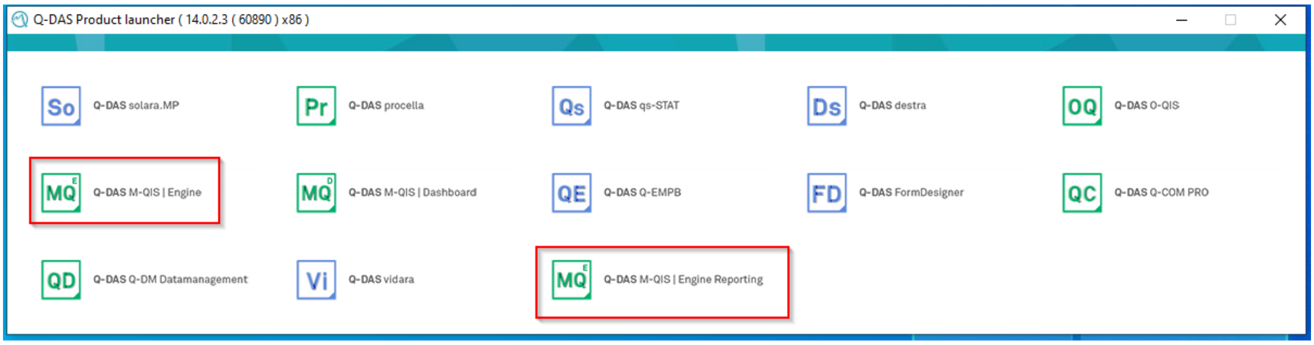
1. All PDFs should be sent together in one mail as 10 attachments, per recipient.
2. All PDFs should be sent together in one mail as 10 attachments, in one mail to all recipients at the same time.
3. All parts should be combined in one PDF to all recipients.
4. Sending links to PDF files stored in the network instead of PDFs.
5. One PDF per virtual part, when parts are grouped.

These combinations will be explained in the following sub-chapters.

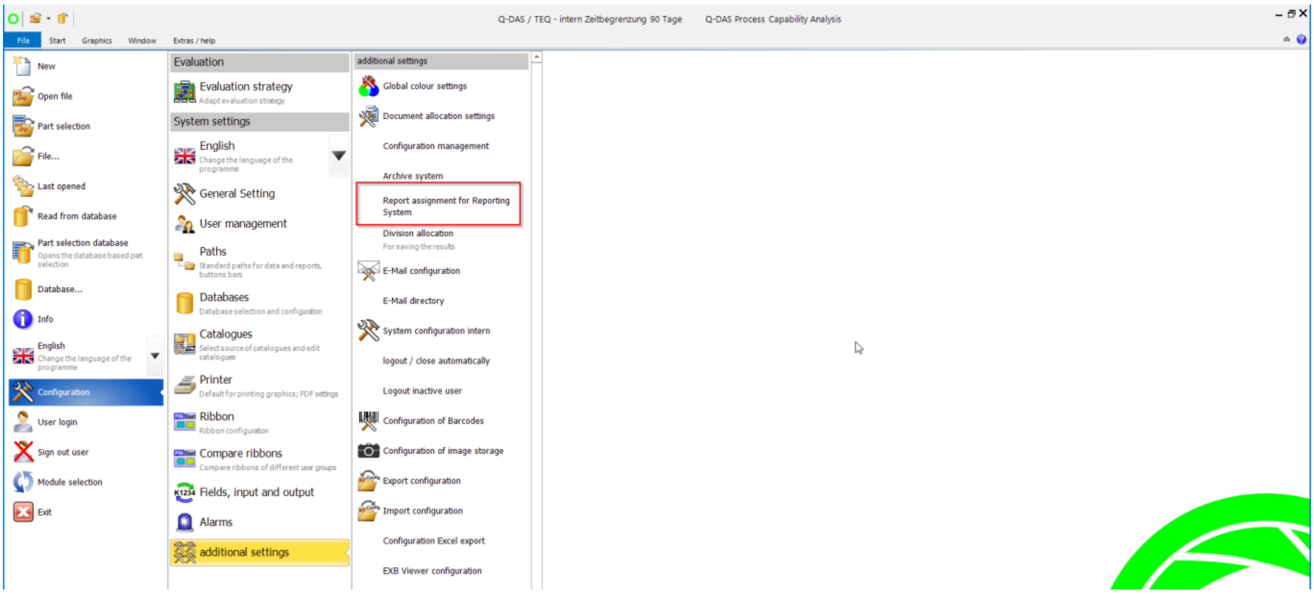
1.1 All PDF files in one email per recipient

The email will be sent to all recipient one by one. Each email will contain all PDF files, in our case 10.

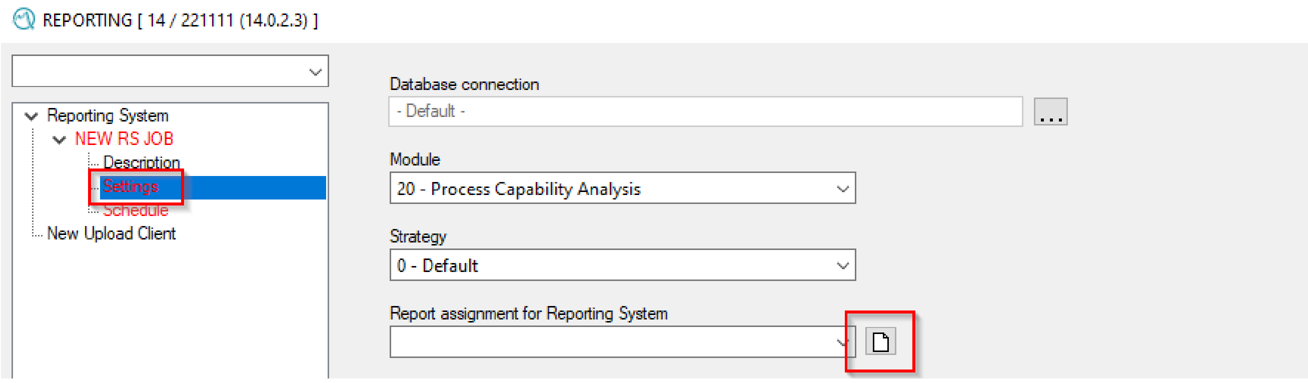
To adjust the setting of the reporting system, it is necessary to go to the “Report assignment for reporting system” option. This option can be either found in M-QIS Engine module or M-QIS Engine reporting module:



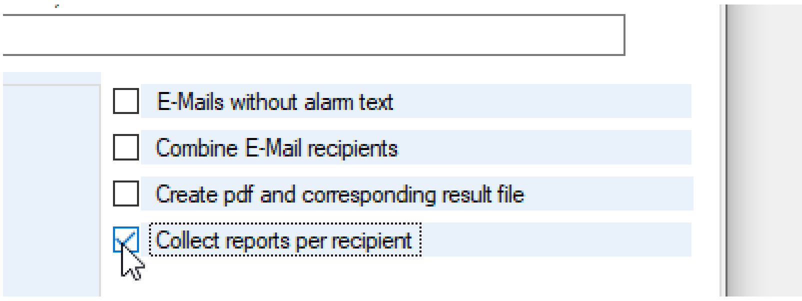
In M-QIS Engine module the options can be found in *Configuration* | *Additional settings* | *Report assignment for reporting system:*



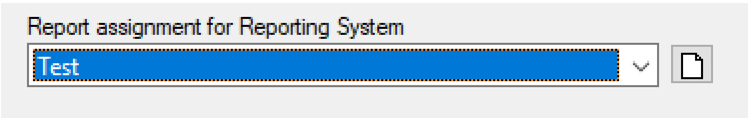
In M-QIS Engine reporting module the options can be found in *Settings* | *Report assignment for reporting system:*



The option “Collect reports per recipient” must be set:

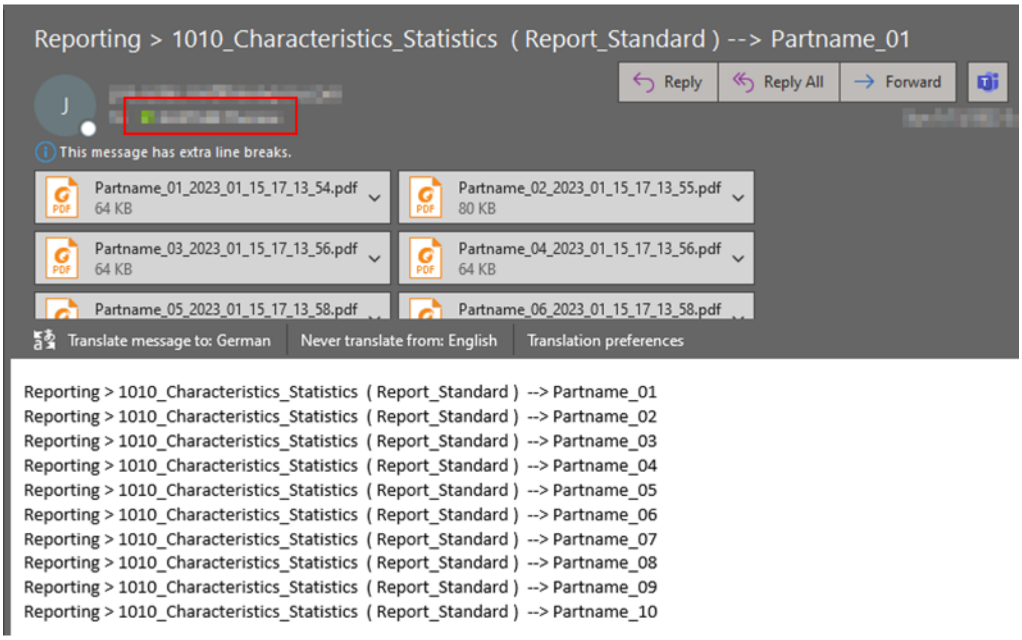


It does not matter where the settings are done. It will work the same. The important thing is to choose the created assignment in the reporting job after the setting is done:



Only those assignment created in the specific sub-module of the M-QIS Engine will be seen in the list. In the reporting job the sub-module is chosen. If the different sub-module is chosen, then the one used for creating the assignment, different list (or blanks) will be seen.

The email is then sent to each recipient separately:

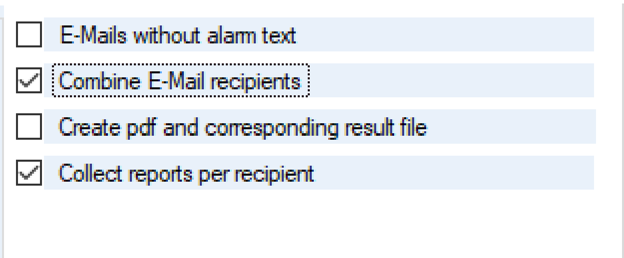


The reporting job will create as many emails as there are recipients. The PDF files are generated for each email separately. Depending on the number of recipients it can have a negative impact on the performance of the whole system.

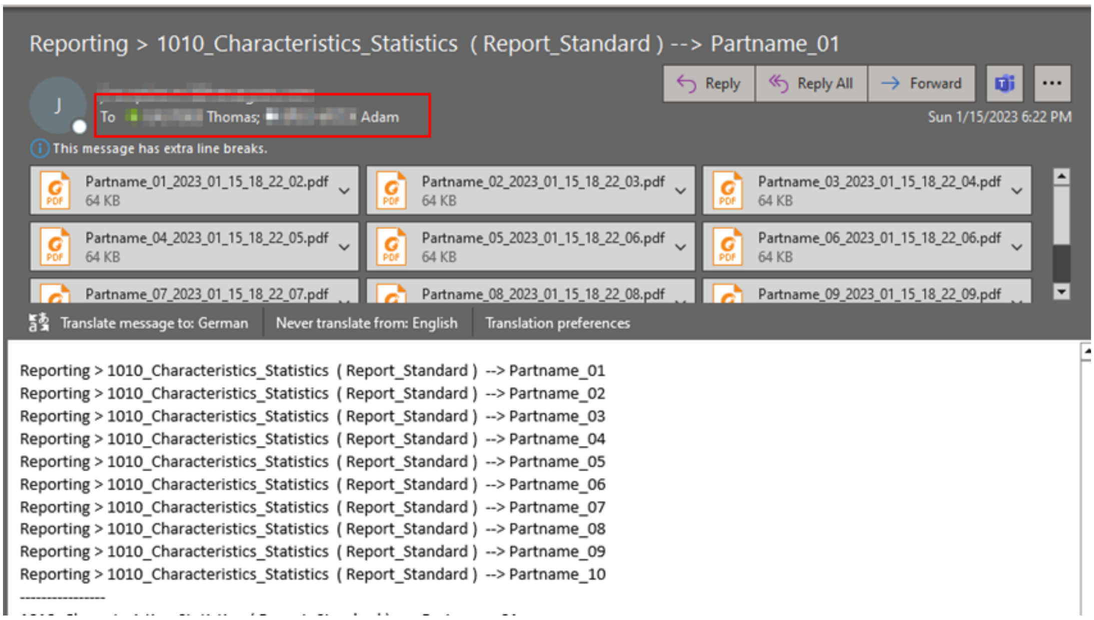
1.2 All PDF files in one email to all recipients combined

All steps for the settings should be done exactly the same as in previous sub-chapter. Only difference is setting inside of the assignment for reporting system.

On top of the “Collect reports per recipient” option, the “Combine E-Mail recipients” options should be set.



One email will be created with all the PDF files and send to all recipients together. In our case 2 recipients:

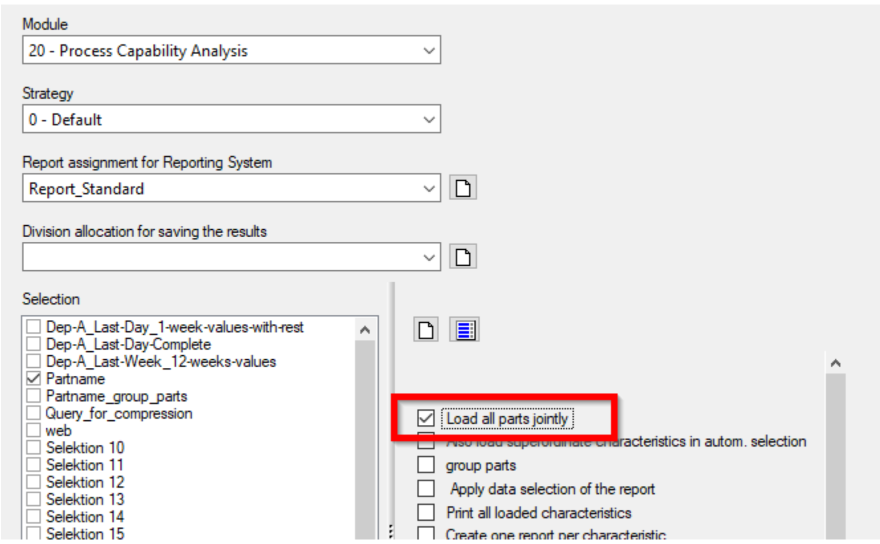


It is better to use the email groups set up by the IT departments to distribute the email to the intended recipients then the single email addresses.

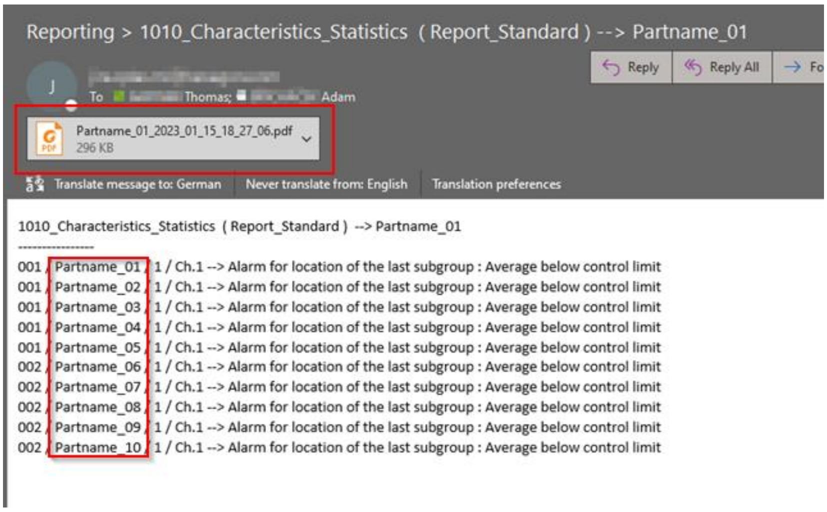
1.3 All parts in one PDF file to all recipients

All steps for the settings are exactly the same as in the sub-chapter 1.2. The difference is that all the parts (test plans) should be inside of the one PDF file.

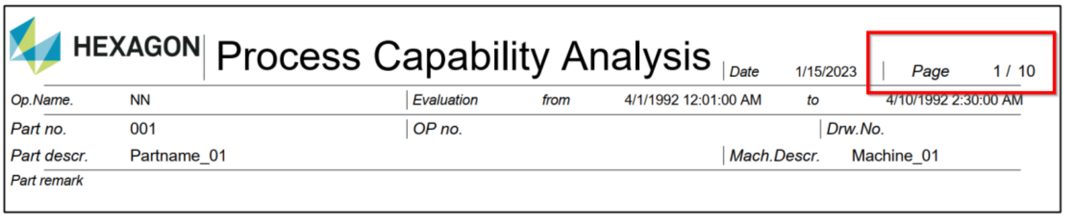
On top of the settings made in the report assignment, the option “Load all parts jointly” must by activated in the reporting job:



One email will be sent to all the recipients with 1 PDF file containing all the parts (in our case 10) together:



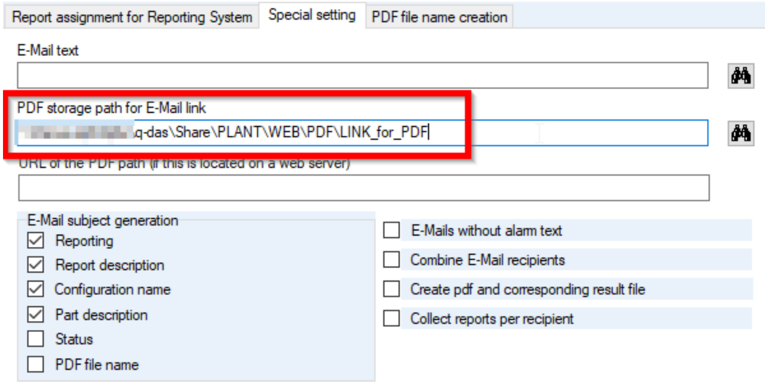
After opening the report, 10 pages are shown (1 page per part).



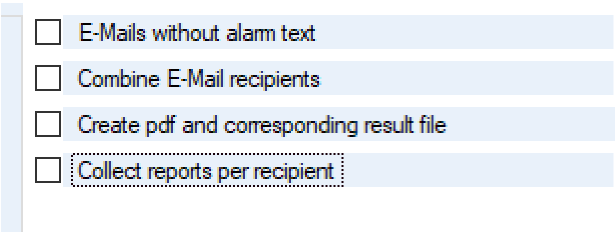
The naming of the PDF file is by default based on the name of the part. In this case, that does not make sense. During setting up a report assignment try to come up with more sensible name for such PDF files.

1.4 Sending Links to PDF files

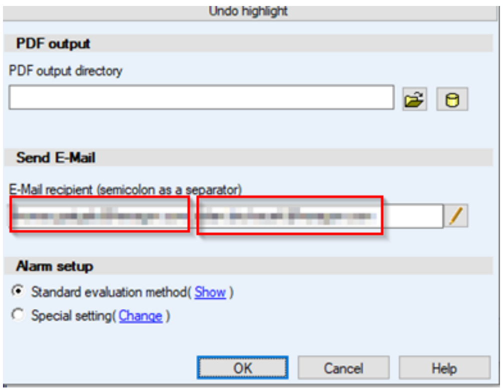
Instead of sending PDF files as direct attachments, it is possible to store the reports on a network drive and only send a link to the storage of PDF files. To achieve this, a storage path must be specified in the “Report assignment for Reporting System” in “Special setting” tab:



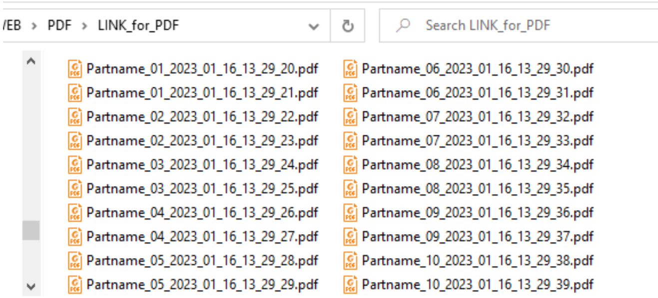
In addition, no settings for collecting the reports or combining the recipients were made:

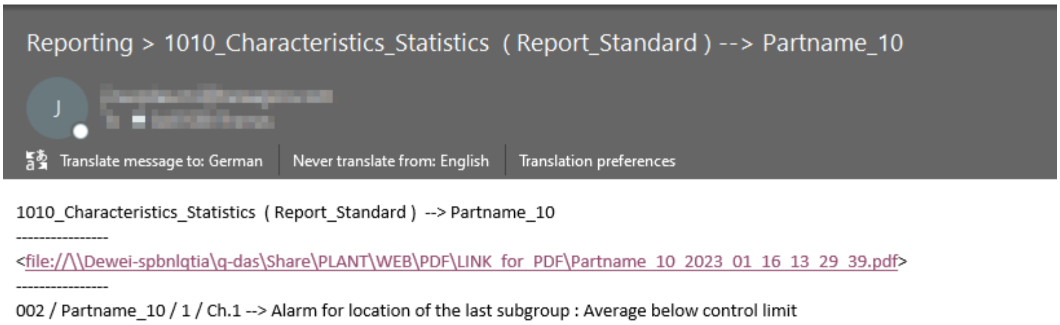


As with sending PDF files directly, it is not necessary to specify the "PDF directory", only the mail addresses. In this case 2 email addresses were used:



The result of all the settings made is, for 10 parts with 2 different recipients, 20 PDF files were created and 10 emails per recipient (one email per created PDF file) are send:



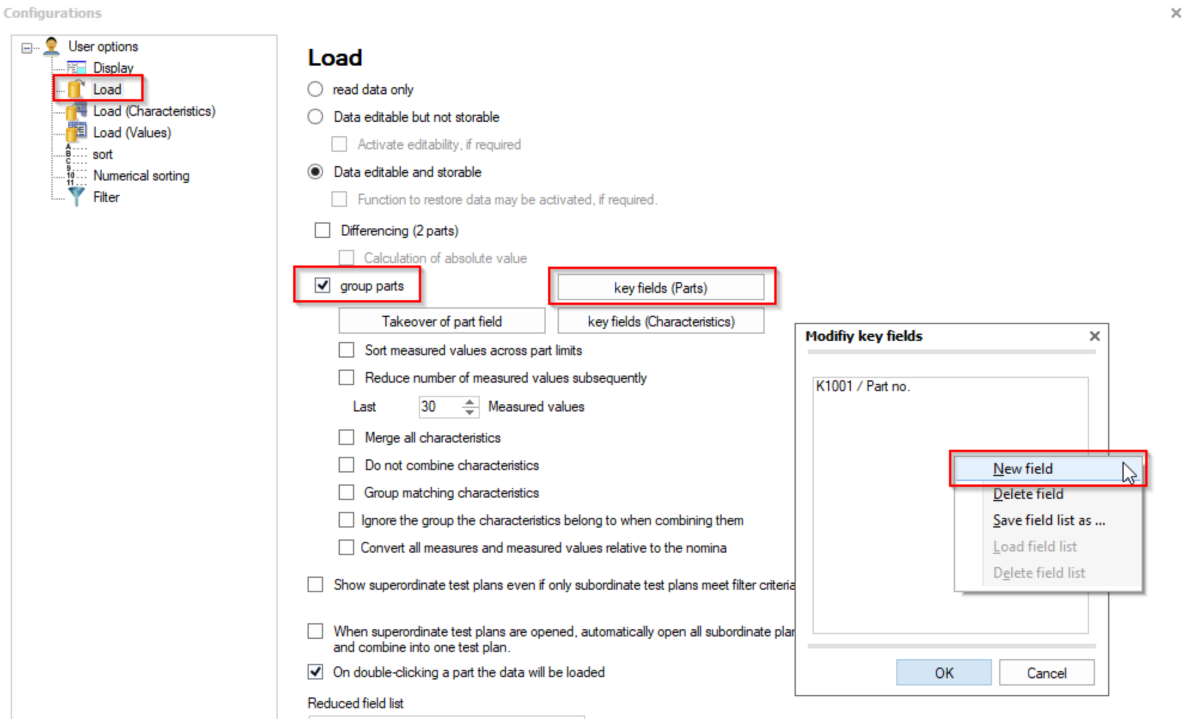


Take care about combination of the options. To create sensible reporting system jobs is also a matter for system performance, which is directly influenced by the settings.

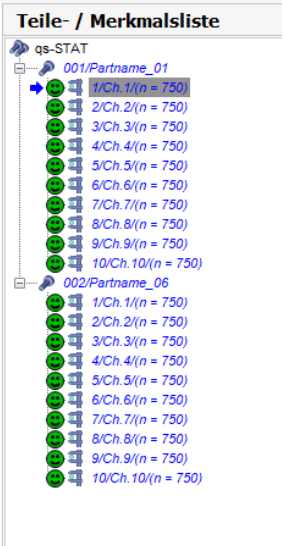
1.5 One PDF file per "virtual part"

"Virtual part" or "virtual test plan" is a term used in the case when the special test plan should be loaded by combining multiple "real test plans". The reason behind such task could be that multiple test plans are created with the same characteristics and attributes and over all evaluation should be done for the same characteristics across multiple test plans.

Combining of the test plans takes place in creating the query using the option "group parts". In our case, K1001 (part number) is chosen for grouping the parts.

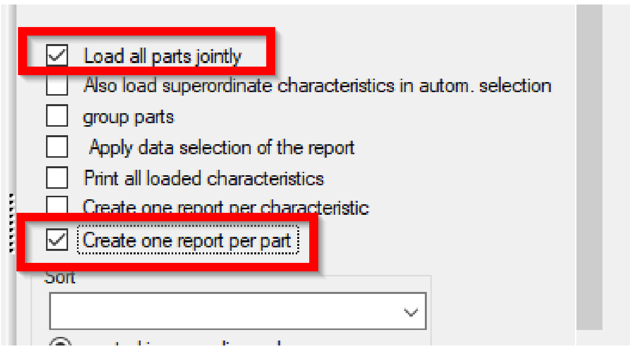


If this option would be used for loading the parts directly in one of the Q-DAS modules, the 10 example parts would be combined into 2 virtual parts:

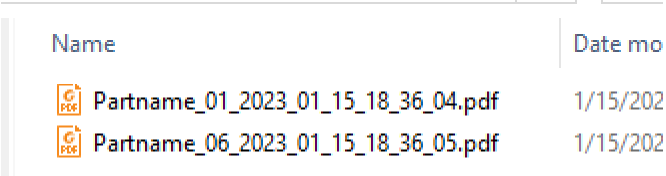


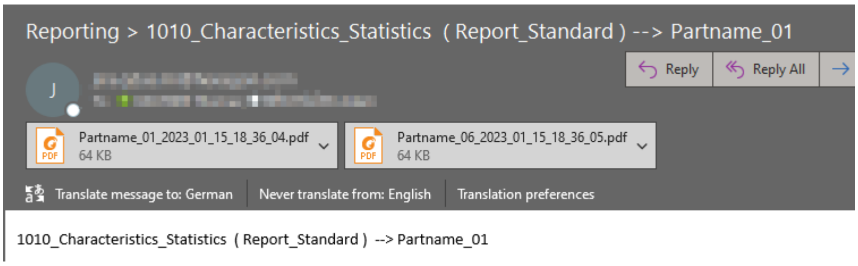
If the option "Combine parts" is used in the query, the option "Load all parts together" in the reporting job settings must be set. This would then mean one PDF for all "parts".

In order to get a separate PDF files for each virtual part, the option "Create one report per part" must be set as well.



The result would now be 2 PDF files for the 2 "virtual parts" in PDF storage or in the email, depending on the combination of the settings for distribution of the reports:





Names of the PDF files are by default created according to the name of the parts. In such setup it might create confusion because only the name of the first real part in the combined virtual part is taken into account. During setting up a report assignment try to come up with more sensible name for such PDF files.