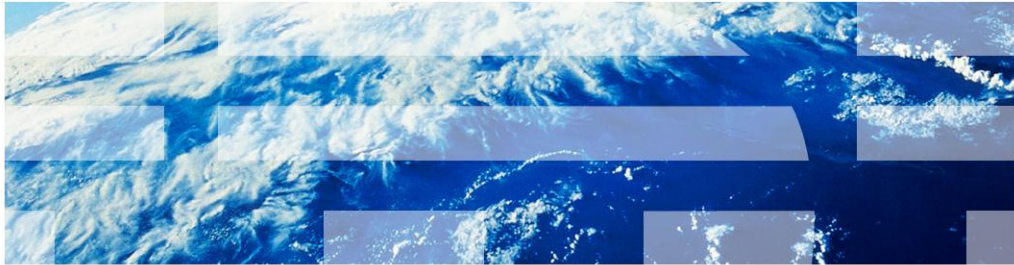


IBM Rational Quality Manager V2.0

Configuring Rational custom reporting



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This module will cover an overview of configuring the Rational custom reporting to successfully run reports in Rational Quality Manager V2.0 and higher.

Module objectives

- These topics are covered in this module:
 - Reporting options in Rational Quality Manager
 - Overview of Rational Custom Reporting
 - How data is transferred from Rational Quality Manager to Insight
 - Rational custom reporting configuration for data transfer
 - XDC configuration
 - ETL configuration
 - Running the ETL
 - Creating reports
 - Importing the canned reports from Jazz™.net
 - Creating the reports from report studio
 - Running and viewing reports
 - Notes
 - Known issues
- When you complete this module, you will be able to:
 - Successfully set up, configure, and begin using the Rational custom reporting tool to run reports

This module will discuss the following topics: Reporting options in Rational Quality Manager and an overview of Rational Custom Reporting. It will show you how data is transferred from Rational Quality Manager to Insight, how to configure Rational Custom Reporting for data transfer, and how to create a report. It will also discuss how to view the generated reports from Rational Quality Manager. This module concludes with some additional notes and information on known issues. When you complete this module, you will be able to successfully set up, configure, and begin using the Rational Custom Reporting tool to run reports.

Reporting options in Rational Quality Manager

- Rational Quality Manager reporting (BIRT)
- Rational custom reporting
- Rational insight

There are three reporting options in Rational Quality Manager V2.0.

The first is Rational Quality Manager reporting, also known as BIRT reporting. Rational Quality Manager reporting is installed as part of the Rational Quality Manager server. It provides a basic level of reporting with no additional installation or configuration required. These reports are generated by and viewable from Rational Quality Manager, but are not customizable.

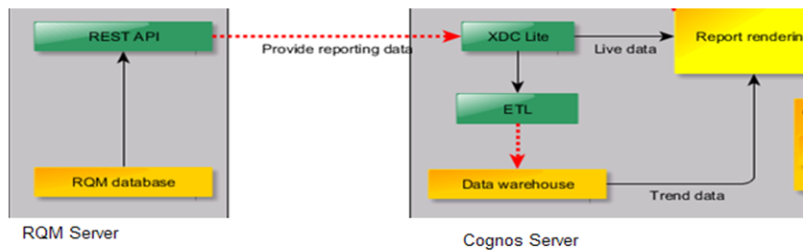
The second is Rational Custom Reporting. Rational Custom Reporting is included in your Rational Quality Manager server license and requires the installation of a separate reporting server. These reports are highly customizable, and you can also build your own reports with the Rational Custom Reporting report studio.

The third is Rational Insight. This requires a separate license purchase, but allows you to harness the full power of Rational Insight. With this option you can generate reports with data from Rational Quality Manager and other data sources.

The remainder of this module will focus on the second option, Rational Custom Reporting.

Overview of Rational custom reporting

- Insight server connects to the Rational Quality Manager server through the REST API
- The report rendering engine on the insight server is used to generate reports, which can be viewed on the insight server or in the Rational Quality Manager server WebUI



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Configuring Rational custom reporting

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This diagram illustrates how the Insight server connects to the Rational Quality Manager server and begins to transfer the Rational Quality Manager data to the report rendering engine.

Data transfer options

- Two ways to transfer data for report generation
 - Rational Quality Manager server -> Rational Custom Reporting data warehouse -> Insight reporting engine
 - Rational Quality Manager server -> Insight reporting engine

There are two ways to render a report in Rational Custom Reporting. The first is to transfer data from Rational Quality Manager to Insight's data warehouse and then generate a report using the data from the data warehouse. This provides optimal report generation performance, and is typically used for generating trend reports. The second is to generate reports based on live data pulled from the Rational Quality Manager server at report generation time. This option provides real-time data at the expense of slower report generation.

Configuring data transfer to the data warehouse

- Configure XML data configuration (XDC)
 - Used to model XML as a relational data source
- Configuring ETL
 - ETL is the job that populates the data warehouse using Rational Quality Manager REST interface

There are two steps you need to perform to configure Rational Custom Reporting to transfer data to the data warehouse. The first step is to configure XML data configuration as shown in the demonstration on the next slide.

An example on XDC configuration



To watch a demonstration of this topic, pause this presentation and click the “Show Me” icon.

Configuring data transfer to the data warehouse (continued)

- Configure XML data configuration (XDC)
 - Used to model XML as a relational data source
- Configuring ETL
 - ETL is the job that populates the data warehouse using Rational Quality Manager REST interface

The next step is to configure ETL. ETL is the job that populates the data warehouse using the Rational Quality Manager REST interface. ETL configuration is listed under the data source connections. The next slide contains a demonstration of how this works.

An example on ETL configuration



To watch a demonstration of this topic, pause this presentation and click the “Show Me” icon.

Running the data transfer ETL (RQMAIL)

- This is the ETL job configured in the previous step
- RQMAIL populates the data warehouse with data from the Rational Quality Manager server for use in running reports

Next run RQMail from dataMovementTasks. This populates the Insight server data warehouse with the test assets information pulling from the Rational Quality Manager server. The next slide contains a demonstration on how to run RQMail.

An example on running the ETL



To watch a demonstration of this topic, pause this presentation and click the “Show Me” icon.

Creating reports

- Importing the IBM provided reports

You now have your Rational Quality Manager data populated in the Rational Custom Reporting data warehouse. The next step is to create reports. You can import the IBM provided reports from Jazz dot net. You can also modify the IBM provided reports to create your expected reports. The next slide provide a demonstration of importing IBM provided reports.

Importing the IBM provided reports



To watch a demonstration of this topic, pause this presentation and click the “Show Me” icon.

Running and viewing reports

- Reports are run on the Rational custom reporting server
- You can view reports on the Rational custom reporting server or on the Rational Quality Manager server

You now have reports available to be run on the Rational Custom Reporting server. The next slide provides a demonstration on how to run reports and how to configure the Rational Quality Manager server to display them.

An example of running and viewing a report



To watch a demonstration of this topic, pause this presentation and click the “Show Me” icon.

Configuring a report to run using live data

- To configure a report to use live data instead of data from the data warehouse, see [technote 1411004](#) on the additional resources slide

You can also run reports using live data. A link to the technote describing how to do this is included in the Additional Resources slide at the end of this module.

Notes

- 1:1 relationship between Rational Quality Manager servers and Rational custom reporting servers
- Report studio: Internet Explorer 6+
- Report viewing: Internet Explorer 6+, Mozilla Firefox 3.0+

This slide highlights three pieces of information that you should keep in mind.

First, there is a one to one relationship between Rational Quality Manager Servers and Rational Custom Reporting servers. One Rational Quality Manager Server can connect to no more than one Rational Custom Reporting server, and vice versa.

Second, report studio requires Internet Explorer version 6 or higher. You can not use Mozilla Firefox to run report studio.

Third, Rational Custom Reporting reports can be viewed in Internet Explorer 6 or higher, and Mozilla Firefox 3 or higher.

Known issues

- Rational Quality Manager 2.0.0.1 cannot archive the report imported from the Cognos server. The workaround needs to be done from a Rational Team Concert client.
- Rational Quality Manager 2.0: PK99020 –Oracle database: The change management data source 'RIDW (ETL)'; is unable to find the signon 'RIDW (ETL)' in the content store.
- Rational Quality Manager 2.0: PK99020 – All databases: Cognos Report Error: The derived data source item or result column name 'status' does not exist in the data source.
- Rational Quality Manager 2.0: PK99020 – Oracle database: RQMAll task fails with "RQMAll' is not a valid specification"

This slide outlines known issues in Rational Custom Reporting as of V2.0.0.1 release. The test fixes for each of the defects listed in this slide are available by contacting IBM Rational client support.

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