TTT: Recommendations

Overview

Xporter is used across several different industries for teams wishing to make fully customizable reports out of Jira issues and related entities.

As a flexible tool, Xporter can easily generate reports for hundreds or even thousands of issues, in some given context (e.g. release report). However, report generation can take considerable time and resources depending on the report definition and the source data used by it.

This document provides some "best practices" to keep your Jira performance untouched, as much as possible.

Sloppy usage of Xporter may affect Jira performance and teams working with it. However, if you follow these recommendations, problems may be mitigated or even avoided at all.

The good news is that there are some simple actions you can follow as a means to reduce performance overhead.

General Recommendations

In the following sections you can see a list of recommended actions as Do's and Don'ts.

These recommendations both apply to standard users as well as for Jira administrators.

Do's

#	Action	Purpose and Recommendations	How-to
1	**Define the maximum number of issues allowed to be exported**	We recommend configuring the maximum number of issues allowed to be exported in order to reduce the computational resources required to generate the report.	Go to **General Settings** and set the value on the field **:** • Bulk Export Option > Maximum number of issues Additional information here.
2	**Set a maximum number of simultaneous export processes**	If your organization has a large number of users, we recommend configuring this setting with a low value (e.g. "2") as a means to reduce the performance overhead.	Go to **General Settings** and set the value on the field **:** • Bulk Export Option > Maximum number of simultaneous requests More on Global Settings configuration here.
3	**Disable Xporter for all projects and users and set up Xporter Permission Schemes**	If Xporter is aimed to be used just by a few people of your organization, we highly recommend setting up Xporter Permission Schemes. Permission schemes will guarantee that only expected users will be able to user Xporter. This implies a creation of a permission scheme and the association of the scheme to a specific project(s).	Go to **General Settings** and turn off the setting: • Enable Xporter for all projects and all users located on Global Permission section. More on Xporter Permission Schemes here.
4	**Use Xporter templates wisely**	Sometimes, Xporter causes considerable performance overhead on Jira because the template is too complex and/or the user is trying to export a large number of data. 1. Try to reuse existing templates available in Xporter's Template Store. They can be the base of your final template 2. In case of doubts, visit our Xporter documentation and see examples or contact Xporter support	The Xporter Template Store is accessible on Xporter app Administration our via website. And even better, it's free! More on building templates here.
5	**Use Xporter Multi-Action workflow post function**	If you want to generate a report during a workflow transition and you need to do multiple actions with it, please use the new Xporter Multi-Action workflow post-function instead of creating several post functions.	More on Xporter Multi-Action workflow post function here.

| 6 | **Filter data at the source (Jira) instead of filtering inside of the template** | Make sure that the source data you use, is only data you need to export.

Exporting or processing unnecessary data requires additional time and consumes additional resources.

1. Select only the issues that are relevant for the report as source
2. Don't do filtering at template level, if you can filter data/issues at source | Define a JQL which gives you all the desired data to be exported. |
| 7 | **Use Excel templates to perform entity listing** | Processing some template formats is more efficient than other ones.

If you need to make entity listings, Excel is better suited.

1. We highly recommend you use Excel based templates to generate entity listings | Use XLSX based templates. |

Don'ts

#	Action	Consequence	Recommendation
1	**Don't use complex templates to export a large number of issues data**	Large amounts of data to be processed and complex templates/reports will require additional computational resources, which may impact Jira's performance.	If possible, we highly recommend you export data in chunks and merge all documents later on, manually.
2	**Don't schedule reports with large amounts of data frequently**	If reports are scheduled frequently and the amount of data to be exported is huge, the scheduled reports processing can substantially affect your Jira performance because new export processes will be spawn more frequently (eventually, leading to overlap of creation of the same reports).	Create scheduled reports for a daily basis at the least. Be careful with the amount of data to be exported, the exporting process can affect Jira's performance. Read more about Scheduled Reports here.
3	**Don't export long text fields using an Excel template**	Whenever exporting a long text to an Excel cell, the text may not be fully visible because the cell is size limited. This problem will worsen if you export the template as PDF.	If possible, avoid exporting long text fields to Excel cells.

Xray Integration Recommendations

Do's

#	Action	Purpose and Recommendations
1	**Reuse existing "Test & QA" related templates**	Xporter's template store already provides many templates related with testing and Xray. Please check the "Test & QA" section and try to reuse an existing template, adapting it to your needs. Some of those templates are described in the next section.
2	**Delimit the scope of data used for the reports**	Testing can lead to tons of data, including many Test Runs coming from automated testing. Please select wisely the source data (i.e. issues and Test Runs), both inside the template itself (i.e iterations) and also the selected issues used as input for the template generation.
3	**Properly choose where to trigger reports**	Testing reports are mostly heavy by nature; thus, avoid having heavy reports being generated as post-functions on workflows, for example. Generating these kind of reports, should be a manual triggered action as frequently as possible. Exporting from a bulk action should also be restricted for certain templates.

Templates related with testing

Xray provides a set of templates related to Xray in our template store. We highly suggest you use them as a basis for your reporting needs.

The table below sums up some of these templates and provides some additional recommendations for the most "intensive" (more resource demanding) ones.

Template Name	Content Overview	Usage Notes

Xray Test Report	This report includes all information about a specific Test, such as: • Description • Last Execution Status • Pre Conditions • Requirements • Test Steps	This report can be used without any special concerns.

Xray Test Set	This report includes all information about a specific Test Set and its tests.
	
	It includes the following information:
	
	• Test Set Description
	• List of all tests, and for each one it includes:
	  ◦ Test Summary
	  ◦ Test Description
	  ◦ Pre Conditions
	  ◦ Requirements
	  ◦ Test Steps
		This report can be used without any special concerns.

Xray Text Execution (Basic)	Xray Test Execution Report has a brief of the all execution, it contains:
	
	• Details
	  ◦ Description
	  ◦ Begin and end date
	  ◦ Revision
	  ◦ Test Environments
	  ◦ Test Plan Key
	• Overall Execution Status (% per status)
	• List of all Test runs
	  ◦ Key
	  ◦ Summary
	  ◦ Test Type
	  ◦ Number of Requirements
	  ◦ Number of Defects
	  ◦ List of Test Sets
	  ◦ Assignee
	  ◦ Status
		This report can be used without any special concerns.

Xray Text Execution (Advanced)	This report is an extension of the previous one. This includes all data mentioned above plus more detail information per Test Run, such as: • List of Defects • List of Requirements • Test Details	⚠ As the number of Test Runs can be considerably high, and the information recorded for each one can be extensive, please use this report carefully as it can require considerable time and resources to be generated. An alternative would be using "Xray Test Execution (Basic)" template instead, if the high-level progress information is enough to you.

Xray Test Plan (Basic)	Xray Test Plan Report contains:
	
	• Test Plan Details
	  ◦ Begin and end date
	  ◦ Summary and description
	• Overall Execution Status (% per status)
	• List of all Tests and their list of executions and status
		This report can be used without any special concerns.

⚠

Xray Test Plan (Advanced)	This is a more detailed report regarding Test Plan. This one includes all information present on the previous one plus detailed information related to each Test Execution.	⚠ Similarly to what happens with the "Xray Test Execution (Advanced)" template, as the number of Test Runs can be considerably high, and the information recorded for each one can be extensive, please use this report carefully as it can require considerable time and resources to be generated. *Note that a Test Plan can have multiple Test Executions related to it, therefore increasing the total amount of runs. An alternative would be using "Xray Test Plan (Basic)" template instead, if the high-level progress information is enough to you.
Xray Requirement Traceability Matrix Report	This report generates a table where all Requirements are listed with the following information: • Summary • Status • List of Tests • List of Defects	⚠ This report can require considerable time and resources to be generated. Please reduce the amount of requirements used as source for the report (e.g. you may generate the report just for the requirements assigned to a given version) .

ⓘ **Please note**

These and other templates can be downloaded from Xporter administration or directly from Xporter's Template Store.

Locally, templates may be modified and later-on uploaded back to Xporter.

If you need something that is not available out-of-the-box on the available templates or if you are having difficulties customizing your own template , please contact our support and we'll be more than glad to help you out.