Exercise 5 - Project overview with pivot tables, charts and jql from Xporter Reports

In this exercise, you'll learn how to populate a template representing a project overview. This template will be generated using Xporter Reports, without using an issue context, having a JQL iteration and pivot tables with charts.

This template is going to be an Excel report.

Let's create the first sheet. Name it Issues and create a table header with 6 columns:

Key	Issue Type	Priority	Summary	Status	Assignee

Create the iteration **#{for i=JQLIssuesCount|clause=project = ACD order by Key desc}** below the table header.

As we're using an Excel template, don't forget the following note:

> Using an XLSX template, please take note that to define an iteration for multiple columns, you need to merge a row of columns and define the **#{for i=JQLIssuesCount...}** inside those merged cells. The same thing should be made to define the **#{end}** of the same iteration. All content between the **#{for i=JQLIssuesCount...}** definition and the **#{end}** will be duplicated for each iteration.

Populate the iteration with the placeholders correspondent to the table header:

${JQLIssues[i].Key}	${JQLIssues[i].IssueTypeName}	${JQLIssues[i].Priority}	${JQLIssues[i].Summary}	${JQLIssues[i].Status}	%{'${JQLIssues[i].AssigneeUserDisplayName}'.length > 0 ? '${JQLIssues[i].AssigneeUserDisplayName}' : 'Unassigned'}

> If the issue has no assigned user, we're printing 'Unassigned', as the default is being printed blank.

Finally, close the statement using the mapping **#{end}**.

Well, the first sheet is complete. From here onward, will be creating pivot tables from this table.

> A pivot table allows you to extract the significance from a large, detailed dataset.

Create sheet for **Chart by Issue Type:**

1. To create a pivot table click on the first cell inside the header. (cell with "Key").
2. On the *Insert tab*, click **PivotTable**
3. A Dialog box appears. Excel automatically selects the data for you. The default location for a new pivot table is the New Worksheet.
4. Click **ok**. The second sheet was created.

Now, The PivotTable fields list appears.

1. The Field *Issue Type* we are going to drag on the **Rows**.
2. *Key* we are going to drag on the **Values**.

Refresh the pivot table data:

1. **Right-click** the pivot table and select **PivotTable Options**
2. Select tab **Data**
3. Check **Refresh data when opening the file**.

> In order to pivot tables being well populated with Xporter data, it's needed to configure them to reload the data when opening the exported file.
>
> Note: this affects all Pivot Tables, When you have multiple, you'll only need to apply to one of them.

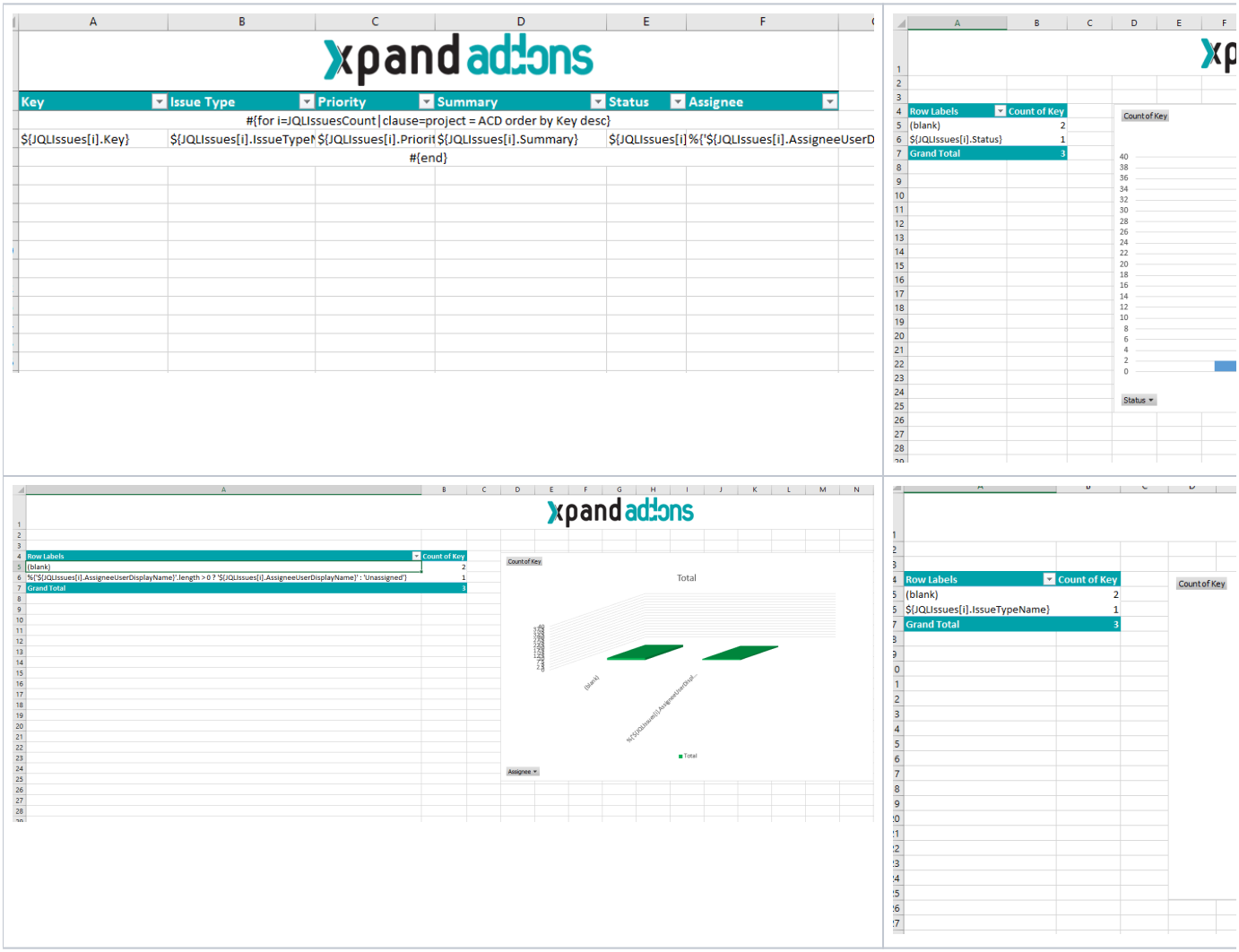
The configuration of the pivot table is done but you are going to add a chart.

1. Select all pivot table.
2. On the *Insert tab*, click **charts**. You can pick up all chart. In this case, I am going to choose the **2-D Pie**.
3. The chart appears on the sheet.

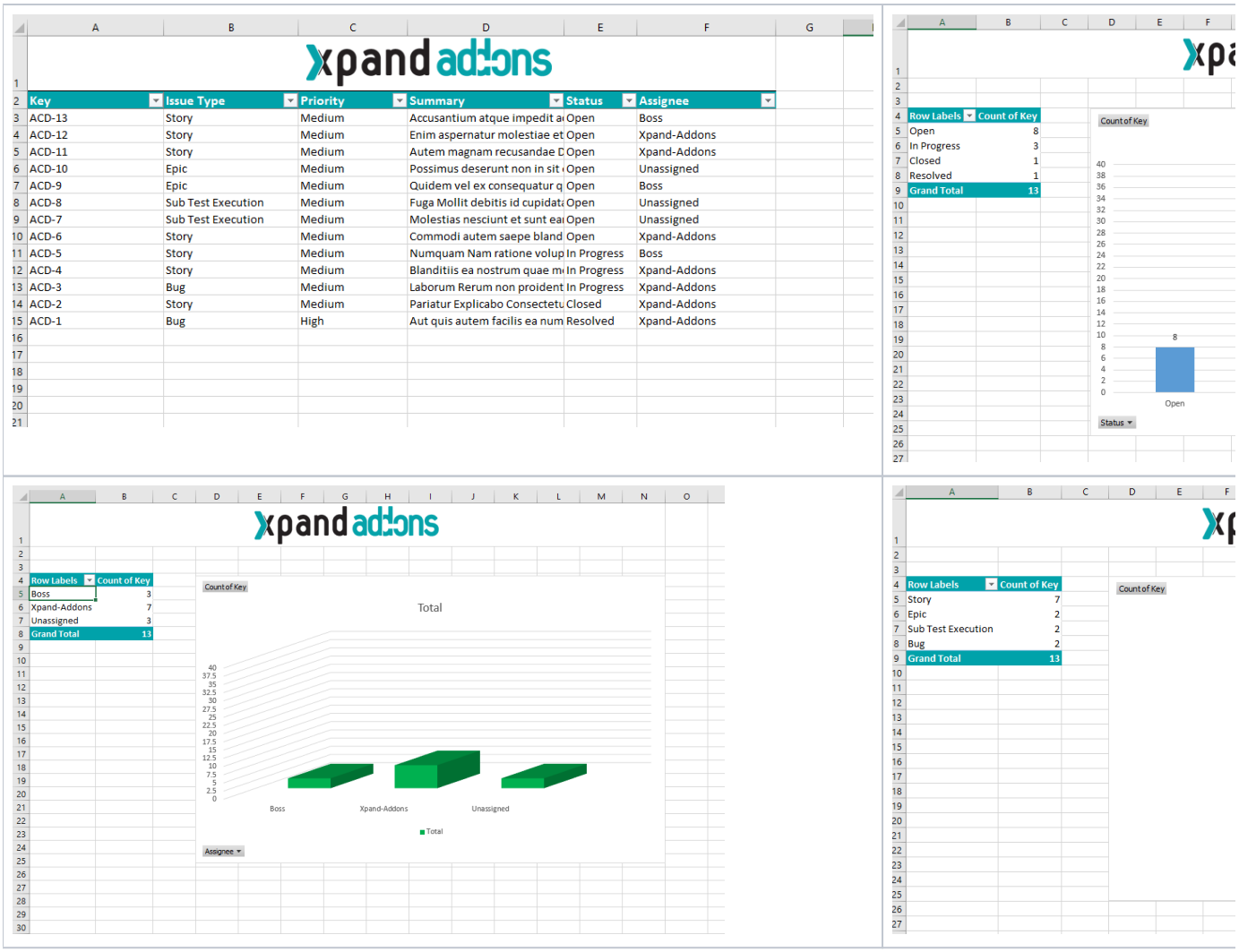
Well, the second sheet is complete. Rename it to "**Chart by Issue Type**".

Repeat the previous steps for each of the following charts:

- **Chart by Status** (use a **2-D Column** chart)
- **Chart by Assignee** (use a **3-D Column** chart)



Below there is a sample of how the generated file will be populated:



Key	Issue Type	Priority	Summary	Status	Assignee
ACD-13	Story	Medium	Accusantium atque impedit a	Open	Boss
ACD-12	Story	Medium	Enim aspernatur molestiae et	Open	Xpand-Addons
ACD-11	Story	Medium	Autem magnam recusandae D	Open	Xpand-Addons
ACD-10	Epic	Medium	Possimus deserunt non in sit	Open	Unassigned
ACD-9	Epic	Medium	Quidem vel ex consequatur q	Open	Boss
ACD-8	Sub Test Execution	Medium	Fuga Mollit debitis id cupidata	Open	Unassigned
ACD-7	Sub Test Execution	Medium	Molestias nesciunt et sunt ea	Open	Unassigned
ACD-6	Story	Medium	Commodi autem saepe bland	Open	Xpand-Addons
ACD-5	Story	Medium	Numquam Nam ratione volup	In Progress	Boss
ACD-4	Story	Medium	Blanditiis ea nostrum quae m	In Progress	Xpand-Addons
ACD-3	Bug	Medium	Laborum Rerum non proident	In Progress	Xpand-Addons
ACD-2	Story	Medium	Pariatur Explicabo Consectetu	Closed	Xpand-Addons
ACD-1	Bug	High	Aut quis autem facilis ea num	Resolved	Xpand-Addons

Row Labels	Count of Key
Open	8
In Progress	3
Closed	1
Resolved	1
Grand Total	13

Row Labels	Count of Key
Boss	3
Xpand-Addons	7
Unassigned	3
Grand Total	13

Row Labels	Count of Key
Story	7
Epic	2
Sub Test Execution	2
Bug	2
Grand Total	13

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Thank you in advance.

Enjoy our product. 😃

Here's the **Exercise 5** related files:

File	Description
Exercise5Template	**Exercise 5** Sample Template file
Exercise5Generated	**Exercise 5** Sample generated file