Report Tailoring

Applicable for Sharpen360 Trace version 5.0+

Revision 1

Table of Content

1 Introduction

Thank you for using our Process Assessment Tool, Sharpen360 *Trace*.

This document describes the Report Tailoring of *Trace*. We try to use a precise naming of concepts in Trace. Please see chapter 6 for our list of Terms and Definitions.

If you have questions, have ideas that you would like to discuss, or just need an introduction to specific parts of *Trace*, please contact us!

Also, we would very much appreciate if you would report any bug or inconvenience you might find. Please use the email below, and add screenshots and descriptions as needed and we will immediately prioritize this.

Use support@sharpen360.com as much as you like. You are welcome!

The Sharpen360 Team.

PS: Please help us by sharing knowledge about Trace to your colleagues, network, family, friends, neighbors, mother, or anybody else interested 😊

Target audience of this document: People that needs to tailor Trace reports into the Customer's own templates and styles.

2 Trace Reporting Concepts

2.1 Overview

The reports in Trace are generated by creating a consolidated data in a format of ReportBO and applying a compatible Report Template which have the format of output in Word, PowerPoint, and Excel file. The ReportBO is the input data generated from Trace, such as an assessment data. The RepotBO is assigned to a specific Reporting Situation, which is a location in Trace where the ReportBO can be accessed from. Repot Templates are linked to a particular ReportBO.

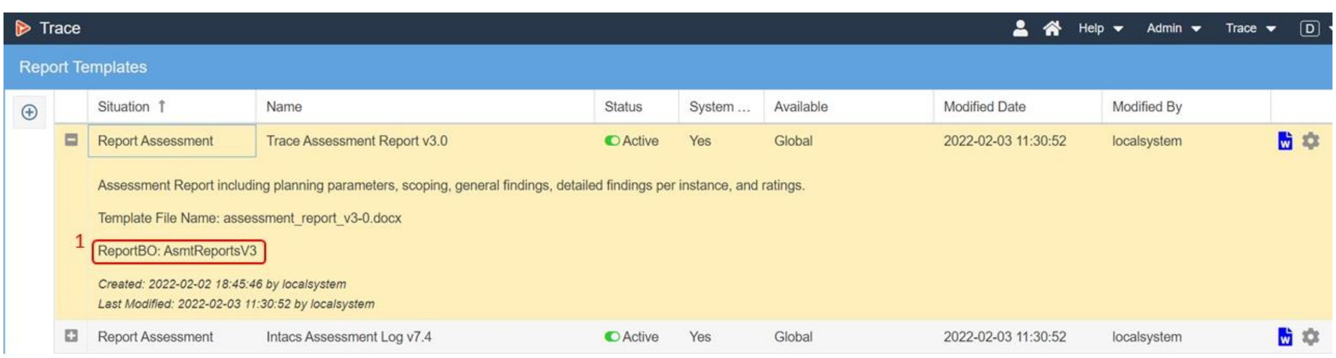
2.2 Reporting Situations in Trace App

Reporting Situations are locations in Trace where user can generate Reports. There are following Reporting Situations in Trace:

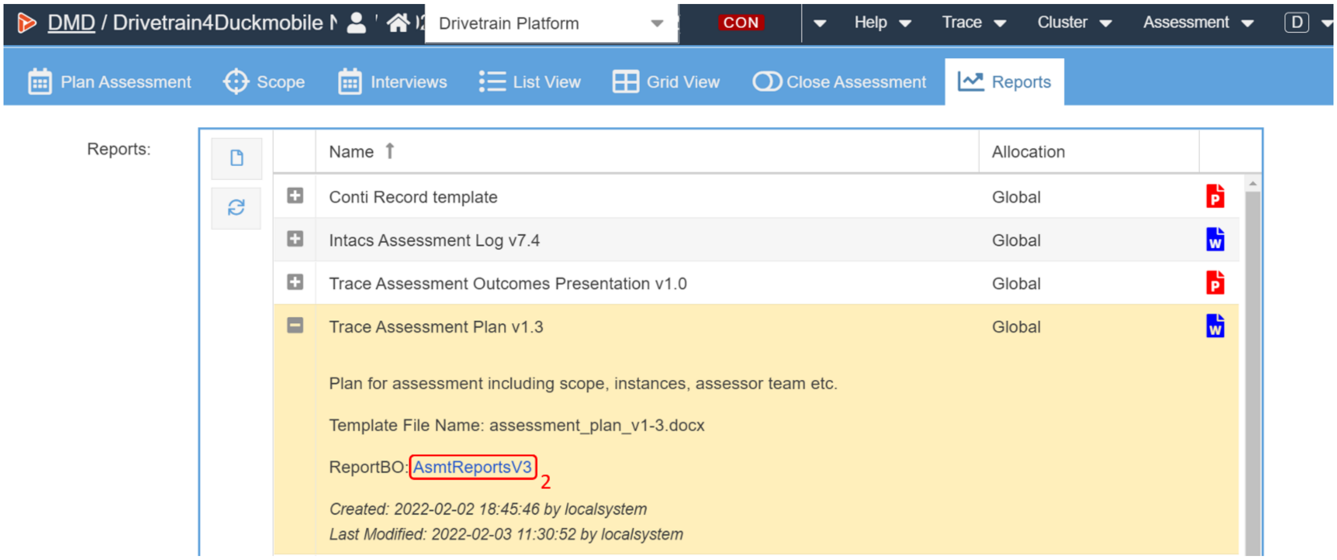
Situation	Description
Interview Estimates	Accessed from Download button in Interviews Page in Assessment
Invitation	Accessed from Word/Excel button in Scope Page in Assessment
Output views	Accessed from menu: Trace-> Assessment Metrics-> Assessment Metrics
PAM Model	Accessed from Model Editor
Report Assessment	Accessed from Reports Page in Assessment
Rule Set	Accessed from Rule Set Editor

2.3 Available ReportBOs

Available ReportBOs can be seen in the Report Manager (1 in following screenshot), which can be accessed from Menu: Trace->Report Manager.



Also, ReportBOs can be downloaded from Reporting situations, such as the Reports page in an assessment, via the button (2) in the image.



2.4 Structure of ReportBO XML

The structure of an ReportBO is shown in below:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<reportbo>
  <meta>
    <name>Trace Assessment Plan v1.3-DMD-12</name>
    <reportdate>2022-02-03 16:28:58</reportdate>
    <reportboname>AssessmentSWRFullV3</reportboname>
    <reportbofunctionname>catReportBOReportAssessmentReportsV3</reportbofunctionname>
    <reportbofunctionversion>1</reportbofunctionversion>
  </meta>
  <data>
    <rtemplatename fieldset="1">Trace Assessment Plan v1.3</rtemplatename>
    <rtemplatefilename>xxx</rtemplatefilename>
    <rreportname>Trace Assessment Plan v1.3</rreportname>
    <rdescription>Plan for assessment including scope, instances, assessor team etc.</rdescription>
    <rcreatedbyusername>Daiki</rcreatedbyusername>
    <rcreateddate>2022-02-03 16:28:58</rcreateddate>
    <rboname>AsmtReportsV3</rboname>
    <rbofxname>catReportBOReportAssessmentReportsV3</rbofxname>
    <rbofxversion>1</rbofxversion>
    <fieldsdata function="catReportBOSnippetFieldsDataV1" version="1"> [71 lines]
    <name>Drivetrain4Duckmobile NEW - 2021-06-04 10:56:10</name>
    <created>2021-06-04 10:56:07</created>
    <appraisalid>a251c830-71e5-4d84-999b-dce8db955c3a</appraisalid>
    <orgunit>Duckburg Car Company - Mark</orgunit>
    <processscope xml:space="preserve">Category B: “Entire product / delivery”.</processscope>
    <purpose xml:space="preserve">Establish a capability level rating and identify process related risks.</purpose>
    <location>Duckburg, Calisota</location>
    <sponsor>Scrooge McDuck</sponsor>
    <startdate>2018-11-05</startdate>
    <enddate>2018-11-06</enddate>
    <stateid>open</stateid>
    <statename>Open</statename>
    <statedate>2021-08-17 07:25:57</statedate>
```

The meta section contains the basic data about the report and all other data, such as data about an assessment, are stored in the data section. All the information the Report Template can access are in the data section. The tags that are the children of <data> can be accessed directly in Report Template, whereas data in the nested structure needs particular operation to retrieve the data.

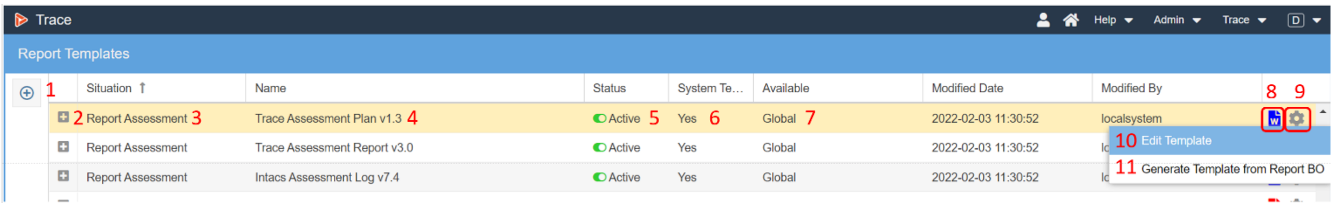
For example, content inside the <location> tag can be displayed in Word or Powerpoint by typing CTR_location.

3 Using Reporting Manager

- Trace Report Manager concepts
- Report Manager

Report Manager can be accessed from the menu: Trace->Report Manager

Following screenshot shows the Report manager and numbered component is explained below:



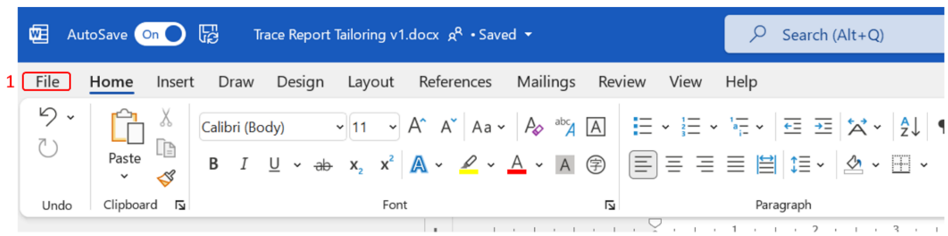
1. Upload button to upload a new Report Template.
2. Button to show details such as modified date and ReportBO of the Report template.
3. Report Situation where the Report Template is available.
4. Name of the Report Template
5. Status of the Report Template: Can be set to Active or Disabled from Edit Template Page by pressing the cogwheel (8) then Edit Template (9)
6. Shows whether the template is a System Template, which is provided by Sharpen360.
7. Template Assignment: Shows whom the Template is available to. The options are:
    a. Global: All users in the system
    b. <Cluster Name>: Only available inside the Cluster
    c. <Username>: Only available for the user.
    d. Multiple: available to multiple users, multiple clusters or both
8. Download button to download the template. Also displays file type the template by the icon(Word, PowerPoint, or Excel).
9. Cogwheel to show menu for Edit Template (10) and Generate Template from Report BO (11)
10. Edit Template: opens a window to change details such as name and Template Assignment on the template.
11. Option to generate report by uploading ReportBO file.

4 Develop tailored report templates

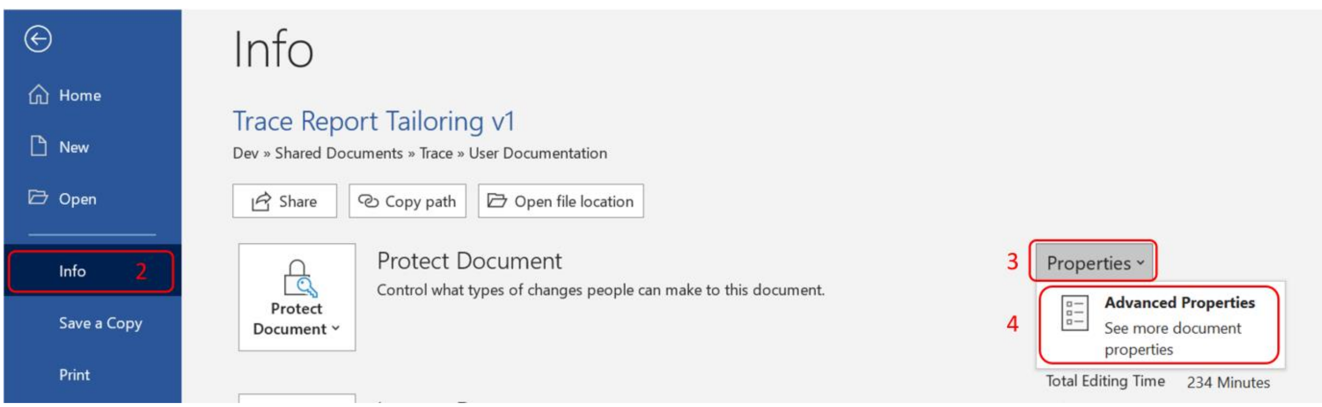
4.1 General principles

4.1.1 Adding ReportBO ID to Report Template

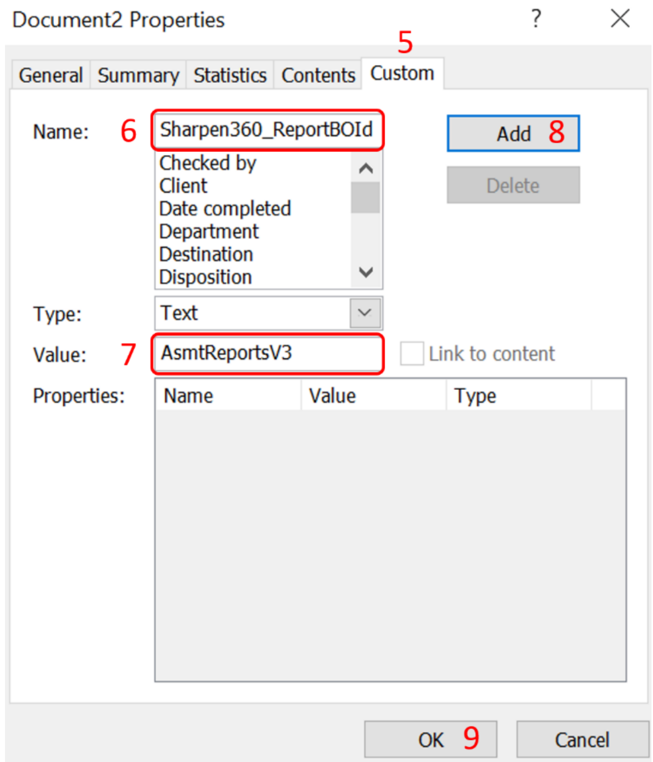
When creating a template from Word or PowerPoint File that is not provided by Sharpen360, ReportBO ID must be entered before uploading to the Trace. This can be done by clicking “File” in Word, PowerPoint or Excel,



click “Info”, “Propeties”, then “Advanced Properties” to open Advanced Propeties Dialog.



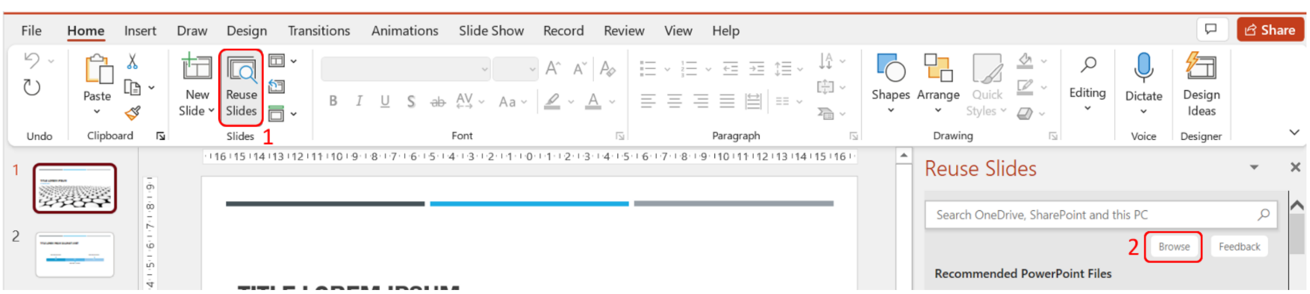
In the Propeties dialog, select “Custom” tab. Enter *Sharpen360_ReportBOId* in the name field (6) and ID of the ReportBO in the value field(7) then click on “Add” (8) and “OK” (9).



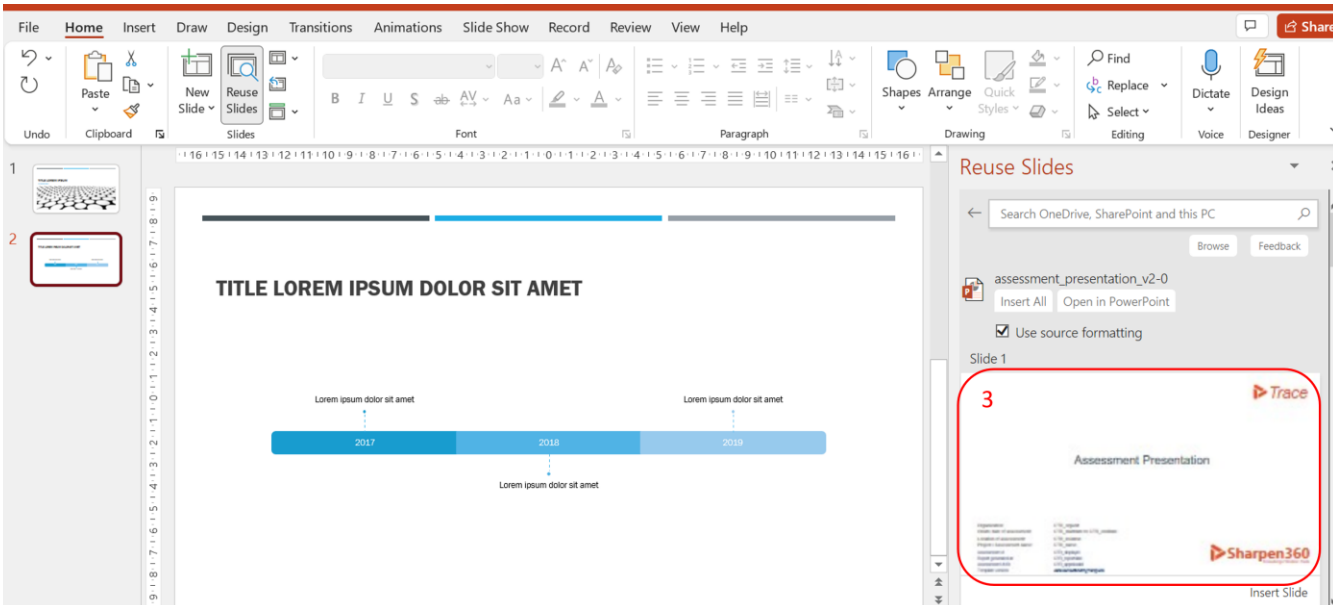
4.2 Tailoring PowerPoint templates

4.2.1 Typical operations: Copy slides from Trace Templates

1. Open a Powerpoint file and select “Reuse Slide” (1) and click “Browse” (2) on the right panel. Then open Power point template from Trace that you want to copy the slides from.

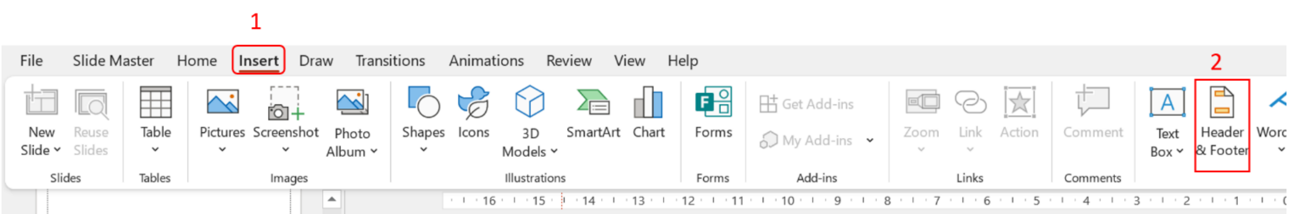


2. Copy slides from selected Powerpoint file to insert from the Reuse Slides Panel (3). The styles form destination Powerpoint file will be applied to the copied slide, therefore some alignment and font sizes may need adjusting.

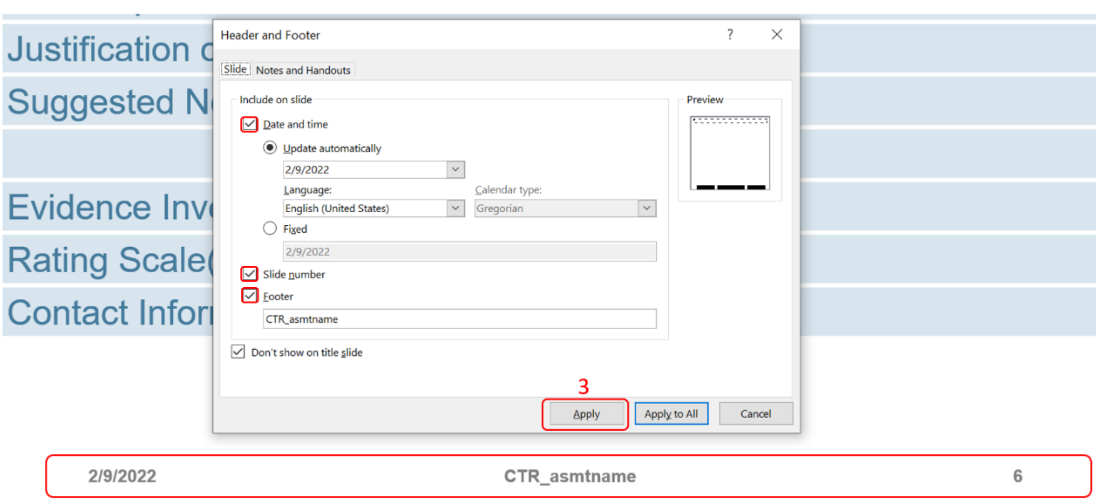


4.2.2 Adding Footer in the Report Template

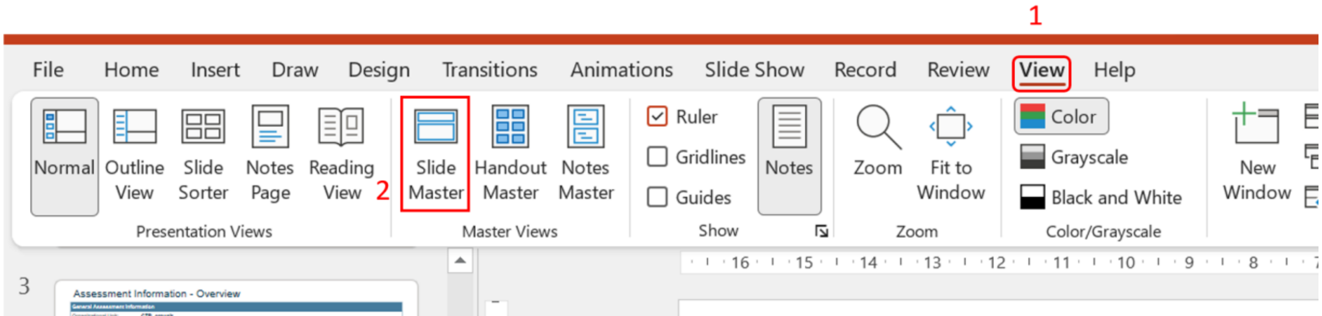
To add footer in Report Template, select “Insert” (1) then “Headers & Footer” button (2).



Now Header and Footer window will appear. Select types of footer you want to insert into the slide and click “Apply” (3).



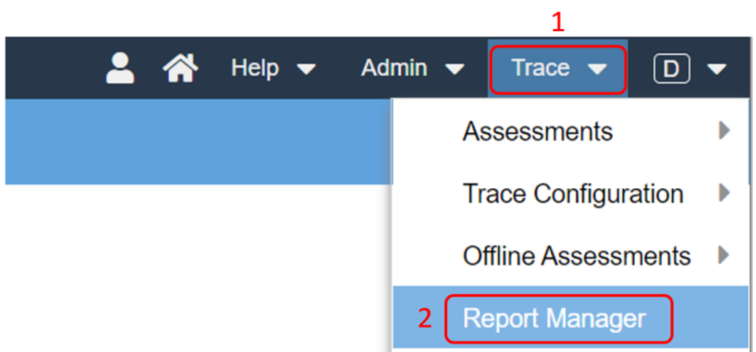
Trace Reporting Instructions can be inserted into the footer to show the name of the assessment like in the example above. If this does not add footers, you may need to add footers in master slides. This can be done by first changing to Slide Master view, select “View” (1) tab and click on “Slide Master” (2).



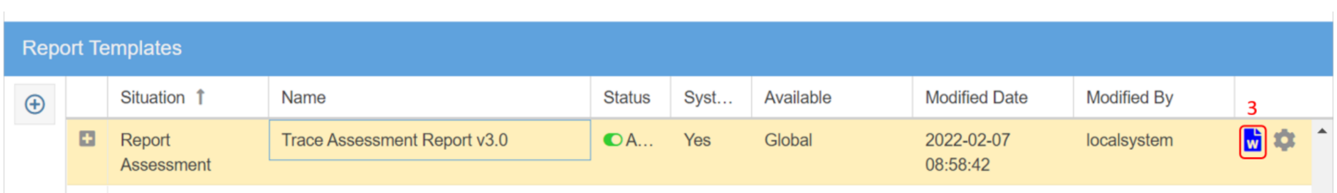
One in Slide Master mode, add footers and repeat the first few steps to add the footers.

4.3 Tailoring Word templates

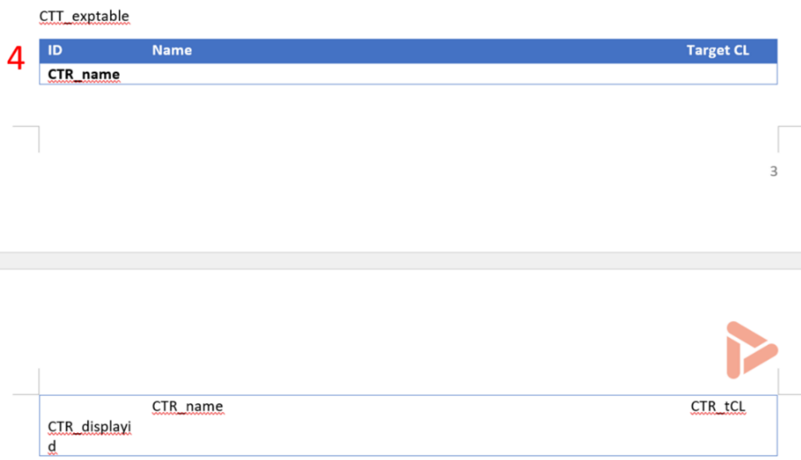
For creating tailored Word templates, we recommend editing out Sharpen360 Word templates. Sharpen360 templates can be downloaded from the menu: Trace (1)->Report Manger (2)



Template can be downloaded by clicking on the Word Icon (3) in Report Manager.



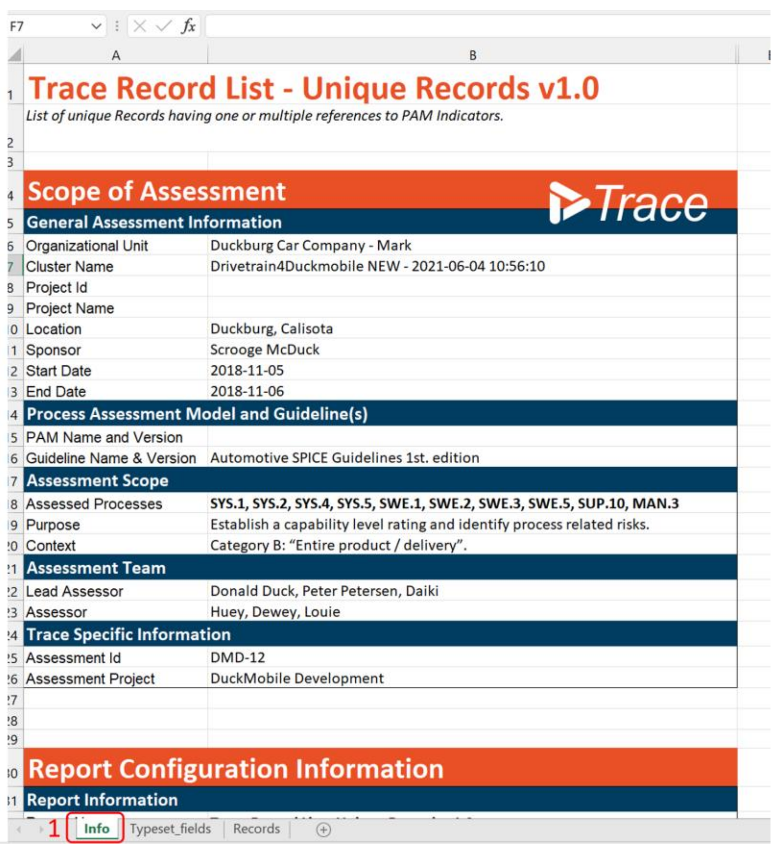
The template includes texts, tables and some Trace Reporting Instructions such as “CTR_name”. Word Report Templates are more delicate than Powerpoint Report Templates, therefore we recommend editing the template with care. Also check that all tables are not split into multiple pages, otherwise it may break the template. Example below(4) shows the invalid table for the template.



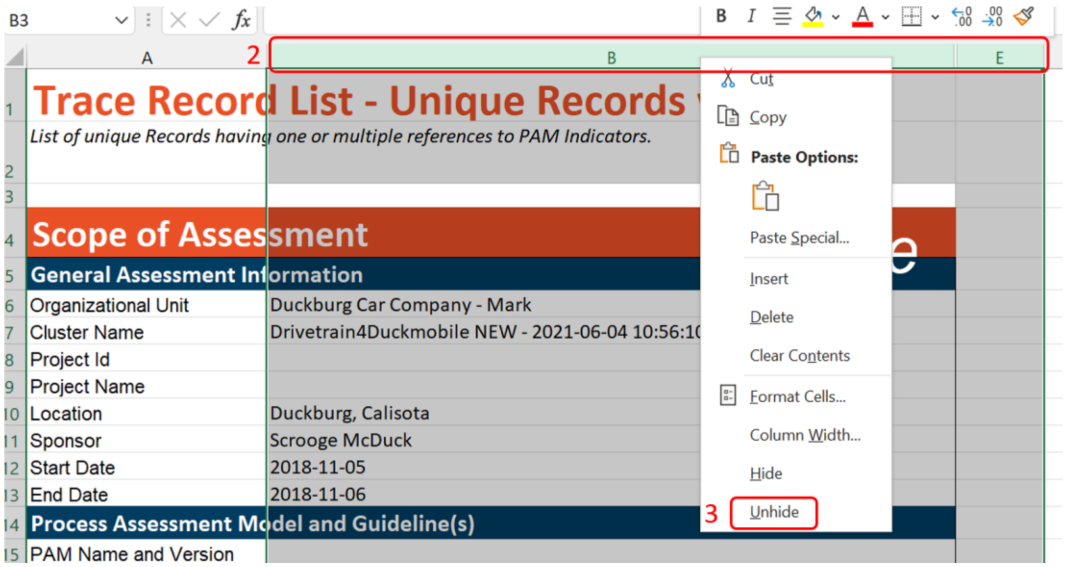
4.4 Tailoring Excel templates

4.4.1 Editing the Front Page

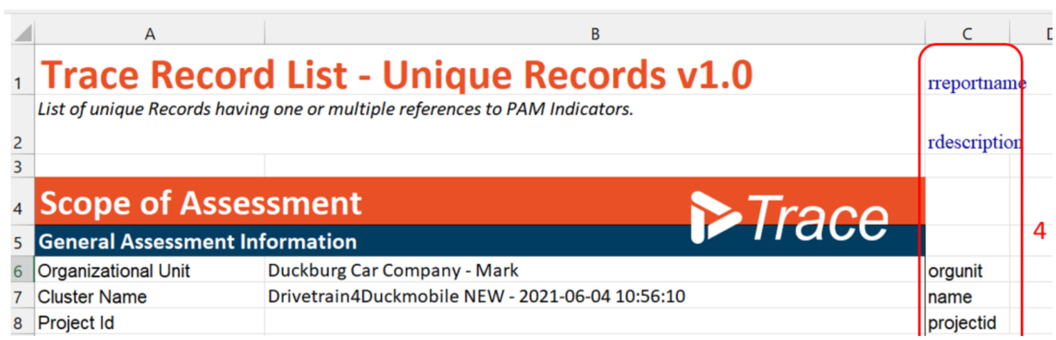
Front page of the excel reports can be viewed from the "Info" sheet (1).



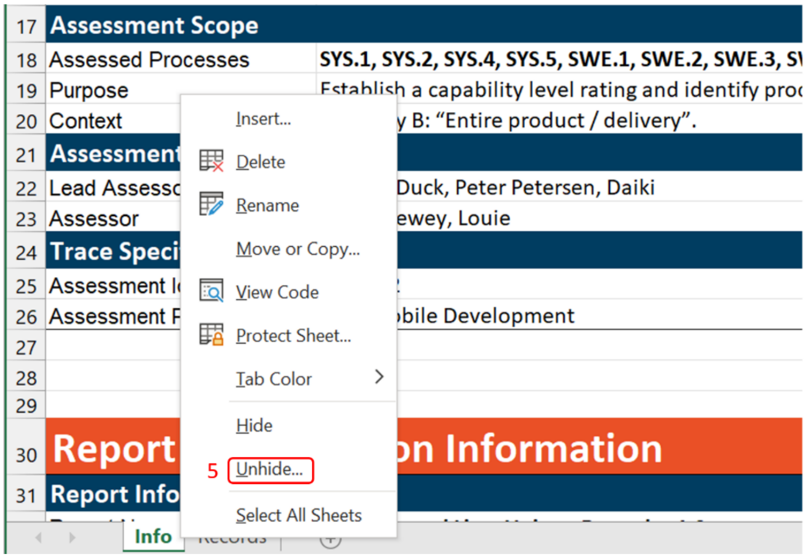
Before editing this page, select columns B and E in the column header, then select "Unhide"



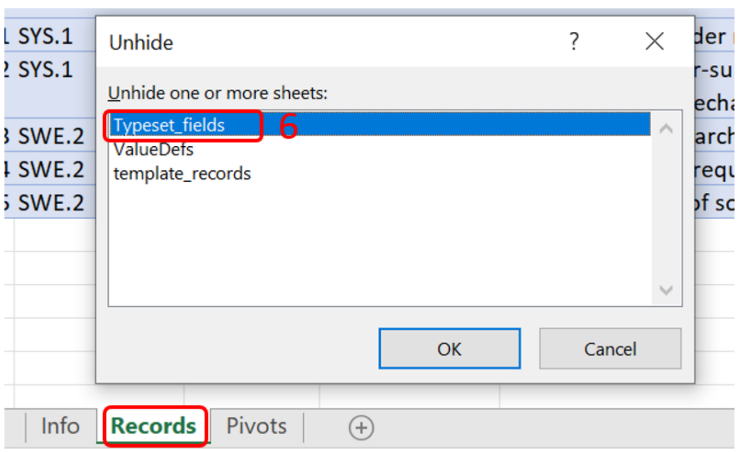
Columns C and D will appear and the values in the column C is used to lookup the values for column B, therefore data in the column C must be copied when rearranging the format in the front page and the value s in the column C should not be changed manually.



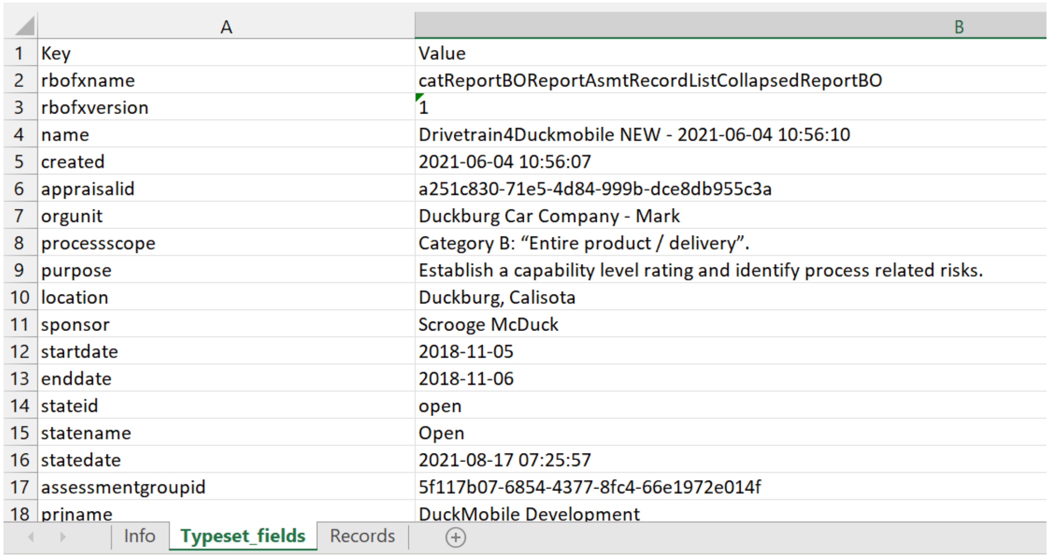
The values in the column B is filled by looking up into another hidden sheet. The hidden sheet can be displayed by right clicking on any sheet and select “Unhide” (1).



Then select “Typeset_fields” and click OK.

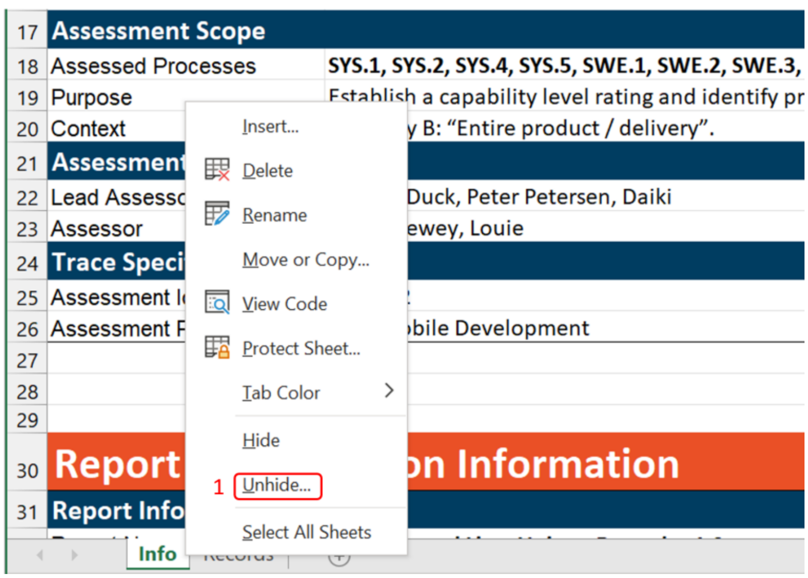


The Typeset Fields sheet contains all the data needed to populate the Info sheet. The entries in column A are the key of each data that matches with the values in the column C (4). of the Info page. The column B contains the values for each entity.

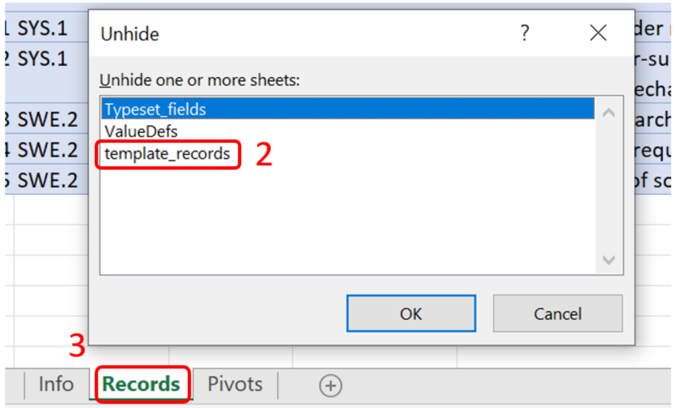


4.4.2 Add Extra Columns in a table

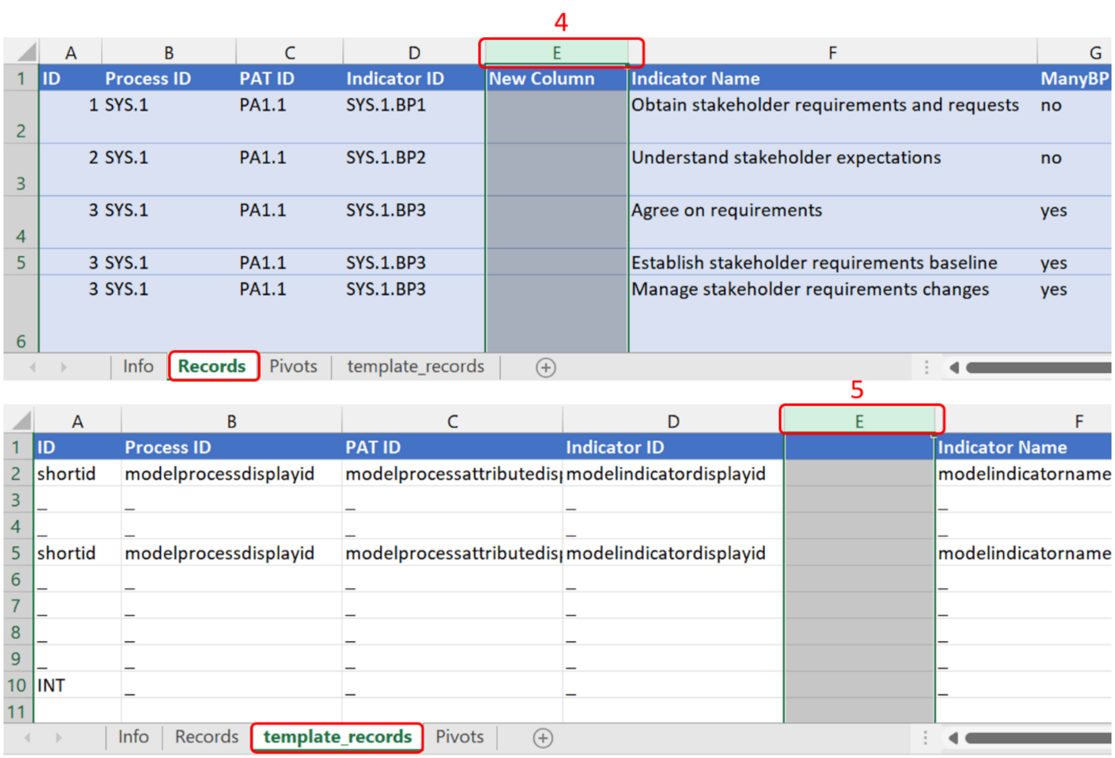
To add extra columns or delete columns in excel generated table, right click on any sheet and select “Unhide”(1).



Then select “template_<>” sheet(2), where <> is the name of the sheet that contains the table that you want to edit (3). The name of the sheet may vary depending on the report template.



Edit the template_<> sheet to match the changes that you made to the table in the other sheet. For example, if a column is inserted in Column E in the Records sheet, same change must be done to column E in the template_records sheet.



4.5 Debugging the templates

When the report templates do not work or gives an error during report generation, here are some tips to debug the template.

4.5.1 Common Mistakes

1. Tag in ReportBO does not match the keywords in Report Templates

2. Specific to Word Report Template
    a. Table that has Trace Report Instructions are split into multiple pages in the template
    Solution: Insert some space before the table to fit the table in one page
    b. Trace Report Instructions are partially modified
    Solution: Copy Trace Report Instruction that is modified to a text editor and paste back and overwrite the modified instruction

5 “Trace Reporting Template Language”

5.1 Use Cases

Repetition of slides CTI_firstwrap

This will make the slide be repeated for every child element of <firstwrap>

The context when expanding CTR_* on the slide will be the current child being processed.

Controlling if a slide is printed

The following options can be set on the text box containing the slide iterator e.g. “CTI_groups”. If you have a top level slide that normally do not have an iterator you can specify the iterator “CTI_”

You can give more than one option. The slide will be printed if at least one option says print.

- **CTSLIDEIF_[tag]** e.g. CTSLIDEIF_ratings This will print the slide if <ratings> exists and is non empty
- **CTSLIDEIFN_[tag]** e.g. CTSLIDEIFN_ratings This will print the slide if <ratings> DOES NOT exist OR is empty
- **CTSLIDEIFV_[tag]=[value]** e.g. CTSLIDEIFV_rating=L This will print the slide if <rating> has text value equal to “L”
- **CTSLIDEIFV_[tag]!=[value]** e.g. CTSLIDEIFV_rating!=L This will print the slide if <rating> has text value different from “L” or if <rating> does not exist

Tables

A **CTT_tagname** must be on the slide and it must appear first. Choose “Send to Back” on the Text Boxand “Bring o Front” on the template table.

Tables with dynamic number of columns

As ordinary tables, but contain additional information int “Alt Text” on the table

- **CTCOLEXPAND_[colnum],[columntags]** e.g. CTCOLEXPAND_2,roles This will repeat column two for every <role> tag inside <roles>
- **CTCOLWIDTH_[colnum],[colwidth]** e.g. CTCOLWIDTH_2,400000 This will make all copies of column two 400000 powerpoint units wide
- **CTROWTYPE_rownum,rowtype (e.g. CTROWTYPE_1,group and CTROWTYPE_2,task)** Used when the table has multiple row types e.g. task or workflow elements. Typically used with a grouping row type and a data rowtype. In that situation the template table can have more than one row. The default mapping is that first template row is rowtype 1, second row is rowtype 2 etc.

5.2 Keywords

CTR_tagname

Callis Template Resolve

Prints the content of <tagname>.

If tagname contains XHTML data the CTR_tagname **must** be placed in its own paragraph

CTIB_tagname:IDENTIFIER: / CTIE_tagname:IDENTIFIER:

Callis Template Iteration Begin/End

Iterate the word content between CTIB and CITE for each sub element in <tagname>.

:INDENTIFIER: is used to match CTIB_tagname with the correct CTIE_tagname. This is needed if <tagname> appears at different levels in the hierarchy .

CTIFB_tagname:IDENTIFIER: / CTIFE_tagname:IDENTIFIER:

Callis Template IF Begin/End

If <tagname> has sub elements THEN expand the content between CTIFB and CTIFE.

CTIFNB_tagname:IDENTIFIER: / CTIFNE_tagname:IDENTIFIER:

Callis Template IF NOT Begin/End

If <tagname> does not exist OR <tagname> has no sub elements THEN expand the content between CTIFNB and CTIFNE.

CTT_tagname

Callis Template Table

The first table following CTT_tagname will have its second row repeated for each sub element in tagname.

6 Terms and Concepts

Term	**Definition**
List view	The “List view” tab in *Trace* provides an “Tree like” view of PAM with Evidence and Records. Alternative is “Grid view”
Report	“Report” is the term used when Assessment data is extracted into Word, PowerPoint, or Excel using a specific “Report Template”.
Report Template	“Report Templates” are used for generating “Reports”. *Trace* has several build-in “Report Templates” which can be tailored into customer-specific formats.