

Configuration: use MS Excel to generate reports for SURE controlled tasks

Microsoft Excel can be used as a simple report generator for SURE controlled tasks.

The following example Excel file is delivered with the SUREforWindows GUI:

<SfW installation directory>\RIS\HELP\TaskReport.xls

You can use the example Excel as a template to create your own TaskReport Excel. The existing functionality can handle the most common requests. The functionality is user augmentable by changing the underlying macros.

Explanation of TaskReport.xls

1. Sheet DataSheet

This worksheet contains the global data that will be used by the report sheets:

	A	B	C	D	E	F	G
1	SURE data		Dropdown box values				
2							
3	OLEID		List	Task type	Environment	Master tasks	
4			Type (Item or Macro)	Item	Item	Macro	
5			Item name or macro arg.	PROBLEM-TYPE	RIS-VERSION	MASTER()	
6		Get dropdown box values	Name dropdown list range	TaskType	Environment	MasterTasks	
7							
8							
9							
10							

- Field 'OLEID'

SURE is connected with Excel through OLE. SURE has a unique PROGID to which Excel can connect. If multiple instances of SURE are installed on a single machine, distinction between them can be made by assigning each a separate OLESERVER number in the SURE INI file (Aw_obj.ini [GLOBAL]OLESERVER).

This field must contain the proper OLESERVER number, or it can be left blank if the desired SURE installation has no OLESERVER number defined.

- Columns 'Dropdown box values'

In these columns you can define cache lists of values from SURE that can be used as validation ranges in the report sheets.

Two types of lists can be downloaded from SURE: Items and Macros.

- An Item list contains all item names from SURE that are of a certain type.
- A Macro list contains all task names that match a set of criteria.

Every column contains the following data:

- List : a user name for the list (for documentation purposes only).
- Type : can be 'Item' or 'Macro', as described above.
- Item name or macro arg. : If Type = Item then it contains the name of the item; if Type = Macro then it contains the selection criteria.
- Name dropdown list range: The name of the range that will be created. This name can be used as a validation range for dropdown fields in the report sheets.

- Button 'Get dropdown box values'

This button creates a data range under each column with dropdown box values, containing the requested data, and named with the requested name.

2. Report sheets

This worksheet creates the task report:

	A	B	C	D	E	F	G
1	Report:	Active tasks of type			Make report		
2							
3	Argument	Value	Field name				
4	Task type		TaskType				
5	Environment		Environment				
6							
7	Macro text						
8	PROBLEM-TYPE(<<TaskType>>) AND STATUS(<<Environment>>)						
9							
10	Task Name	Short description	Status	Assigned	Entered	Priority	Delivery
12							
13							
14							
15							
16							

- Range "Argument"

The frame below "Argument" contains choices that the user must fill in, and that will be placed in the macro string in cell "Macro text".

- Argument : a user name or prompt for the value.
- Value : the value to be filled in. If this value is a choice from one of the drop down lists, the cell can be turned into a drop down box via: Data / Validation, under Settings enter Allow = "List", Source = "=name", this "name" being the name of one of the named ranges in worksheet DataSheet.
- Field name : the name that will be used in the cell "Macro text" to be replaced with the entered value.

A unique name has to be defined for this range. This name is used by the Excel macro called by the button 'Make report'.

- Cell "Macro text"

This cell contains the RIS macro definition that will be executed to select the task names for the report. Values from the range "Argument" can be included by enclosing their field names in '<<' and '>>', e.g.

```
DEPENDENT(<<Mastertask>>)
```

A unique name has to be defined for this cell. This name is used by the Excel macro called by the button 'Make report'.

- Data columns

The column list contains two rows.

The first row is visible, and contains a user name for the task field that will be put into this column. The second, black on black, row contains the real field name. The cells in this second row can have a NumberFormat defined, that will be copied to this column on all the data rows that are created by the macro execution.

- Button "Make report"

This button calls an Excel macro that can optionally check the validity of the user data entered, and subsequently calls the generic macro "CreateReport" with a number of values and range names. "CreateReport" compiles the SURE macro text from the cell "Macro text" and the values from range "Argument". It then executes this SURE macro and the resulting set of task names is placed in the leftmost column of the target range. Per task, the data columns are scanned to read

the field names, and the task values for these fields are inserted into the correct column next to the task name.

Complex reports

To create more complex reports, it may be necessary to create custom copies of the Excel macro "CreateReport", and adapt them as needed.

Overview of some methods that can be used in this sheet

Object: Task

Method: _cmd_Property

Get all task attributes. A second automatically called sub method retrieves all custom attributes.

Input:

TaskName	A18	Task name
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Output:

SecurityFunc	A18	(internal)
TaskPriority	A18	Priority
Department	A18	Department
Release	A18	Release
CompileQueue	A18	Compile Queue
ResourceId	A18	Resource ID
MasterTask	Bool	Is a master task
PowerTask	Bool	Is a power task
TaskEffort	N3	Hours required to complete
TaskEntered	N8	Date entered
TaskDelivery	N8	Date to deliver
TaskOpened	N8	Date opened
TaskReady	N8	Date readied
TaskSolvedIn	A18	Solved in release
TaskPerformedBy	A18	Performed by
DumpTimeStamp	N14	Date last dump
DumpStatus	N1	Status last dump
AllowDeny	Bool	Task may be Denied
AllowClose	Bool	Task may be Closed
AllowDescr	Bool	Description may be changed
AllowSol	Bool	Solution may be changed
AllowDoc	Bool	Documentation may be changed
AllowTech	Bool	Technical info may be changed
TaskHasLink	Bool	Task has linked items
TaskHasHistory	Bool	Task has history
ProjectName	A18	Project
TaskGroup	A18	Task group
TaskType	A18	Task type
Environment	A18	Environment
TaskReference	A12	Reference
TaskReportedBy	A18	Reported by
StatusByEmail	Bool	Informeer status change via email
TaskShort	A60	Short description
Text80_1	A80	First line task description
Text80_2	A80	2 nd line
Text80_3	A80	3 rd line
Text80_4	A80	4 th line
TaskAtt	A255	Name attachment
Solution_1	A80	First line task solution
Solution_2	A80	2 nd line
IsUser	Bool	Is assigned to a user
ByUser	A18	Username assigned to

IsEmpFunc	Bool	Is assigned to an employee function
ByEmpFunc	A18	Employee function assigned to
IsTeam	Bool	Is assigned to a team
ByTeam	A18	Team assigned to
TxtToHandleBy	A62	Display version of assignment type & name
InformByEmail	Bool	Inform assignment via email
TaskStatus	A18	Status
TaskSubStatus	A18	Substatus
TaskDependency	N1	Dependency (master/dependent/none)

Object: Task_Dependent
Method: _tsk_IsDepFrom1

Get tasks that this task is dependent of.

Input:

TaskName	A18	Task name
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Output:

MORE-BROWSE	Bool	(always False)
CNT-BROWSE	N2	Number of tasks
Tabel Brw_Dependent [0 .. CNT-BROWSE - 1]		
TaskDepName	A18	Task name
TaskGlobalState	N1	Coding task status
TaskIndicator	N2	Indicator
TaskInformation	A72	First line task description

Object: LogInfo
Method: BrowseLog

Get recent log information.

Input:

TaskName	A18	Task name
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Output:

MORE-BROWSE	Bool	(always False)
CNT-BROWSE	N2	Number of log entries
Tabel fmtBrowseLog [0 .. CNT-BROWSE - 1]		
LogTime	N14	Timestamp (yyyymmddhhmmss)
LogEnvironment	A18	Environment
LogUserId	A18	User
LogTask	A18	For task
LogProg	A18	Program
LogFunc	A18	Executed function
LogText	A18	Description

