CREATE WITH ROLLUP FUNCTIONALITY

Original Software

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SYNOPSIS

Within Qualify we have the concept of a status property that utilises a defined picklist, for example on a Test entity status, we may have the statues as 'Not Ready', 'Ready to Test', 'In Progress', 'Passed' and 'Failed'.

'Create with Rollup' allows us to change the status property on the parent Entity based on the child entity. Tests would commonly have a parent Entity that would allow grouping of the tests. Changing this status would allow an overview of that grouping of tests.

We also can chain 'Create with Rollups', so for example if a test failed, we could change the header entity and from that change the Test Sprint and Project Entity.

Reporting on the Entiry we can then easily determine the state of the testing.
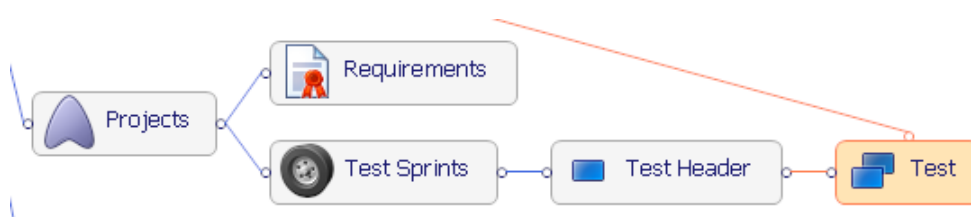
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CREATE AND ROLL-UP

Create and Roll up can only be configured in a parent-child relations ship. In the example we are using today we have a Project that has many Test Sprints that have many Test Headers that contain a grouping of Tests to be executed.
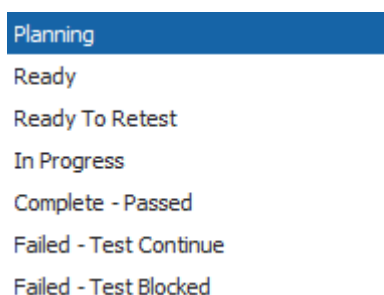
From the Project Entity, we would want to see the project was at a status of 'In Planning', 'Testing in a Ready State, 'All Tests Passed' or 'Failed Tests'.

The configuration will allow the parent Entities to change dynamically, as soon as we have a failed test, this would be reflected immediately at the Test Header, Test Sprints and Project Level.
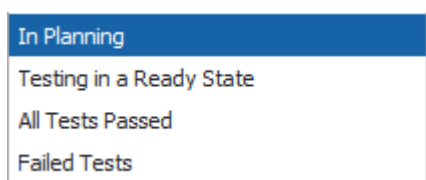

Configuring Create and Roll-Up

1. Login into Qualify as the administrator and edit the Application Definition.

2. Determine the Status of the Entities you wish to change automatically, in this example I have the following.

    a. **Test:** The Test Status has the following entries.

Planning
Ready
Ready To Retest
In Progress
Complete - Passed
Failed - Test Continue
Failed - Test Blocked

    b. **Test Header, Test Sprint and Project:** For the Three parent entities we have the following entries.

In Planning
Testing in a Ready State
All Tests Passed
Failed Tests

3. The rules we want to implement are:

    a. **Test to Test Header:**

        i. Any 'Failed – Test Continue', update Test Header to 'Failed Tests'
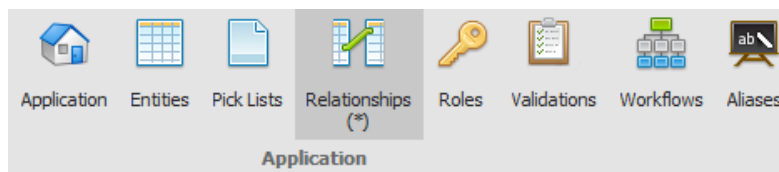
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      ii.   Any 'Failed – Test Blocked', update Test Header to 'Failed Tests'

     iii.   All at 'Planning', update Test Header to 'In Planning'

     iv.   All 'Complete – Passed', update

      v.   Any 'Ready', update Test Header to 'Testing in a Ready State'

     vi.   Any 'Ready to Retest', update to 'Testing in a Ready State'

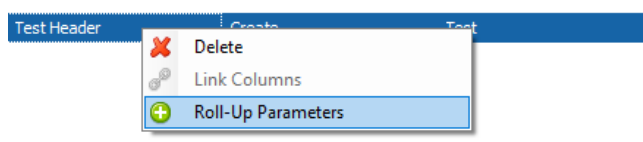b. **Test Header to Test Sprint and Test Sprint to Project**

      i.   All 'InPlanning' matches 'In Planning'

     ii.   All 'All Tests Passed' matches 'All Tests Passed'

     iii.   Any 'Failed Tests' matches 'Failed Tests'

     iv.   Any 'Testing in a Ready State' matches 'Testing in a Ready State.

4. To configure the rules:

a. Select the Relationship icon from the top ribbon bar.

b. From the Create Relationship between the Entities, Right Mouse click and select 'Roll-Up Parameters'

c. This will open the confirmation window, select the single value select property for both Entities before populating with your desired rules.

5. Restart Qualify and test the changes.