RESPONSESYSTEMS

QA Console

check | address | implement

Table of Contents

QA Introduction

Brings the power of automated standards enforcement to your projects to accelerate your development process. Our highly configurable and extensible software ensures that your applications remain high performing and consistent to make maintenance efficient and effective.

Using the Console means QA checking your changed objects becomes a quick and simple task. When objects don't conform, clear reports pinpoint the issue and tell you how to address it. The software also produces a Compliance Certificate so when it comes to a QA Review, the necessary documentation is all to hand leaving you with more time to do actual development.

By taking a model/object view of your encyclopedia, you are presented with a tree view of all encyclopedia models which can be expanded through object type nodes down to individual objects. Checks can be run at the model level, object type level, aggregate set level, subset level, against individual objects or user built lists of objects.

Model List

This pane provides the encyclopedia model listing and allows the user to navigate to the desired object type or types by expanding or contracting the nodes.

Depending upon the site's security preference, the model list will contain either all models in the encyclopedia or only those models the user is authorised for.

Should a model be added to or removed from the encyclopedia during a session the Model List can be refreshed using the File menu option or tool bar push button.

Clicking on a model name will trigger an object fetch that, when completed, causes the name to be displayed in bold. The model is then ready for use and its tree can be expanded. Models that are used often can be marked as favourites by right clicking them and selecting Add/Remove to Favourites from the Model menu. Favourite models are indicated by a star next to the model name and its tree will be automatically loaded when the application Console is next opened.

The Model Filter field allows the user to reduce the model list to those containing the desired value. Simply start typing in this field to filter models.

Select an object by clicking it or use the SHIFT key and click to select multiple objects.

Once objects are selected, choose from the toolbar menu options, push buttons or right click menu to perform the desired feature.
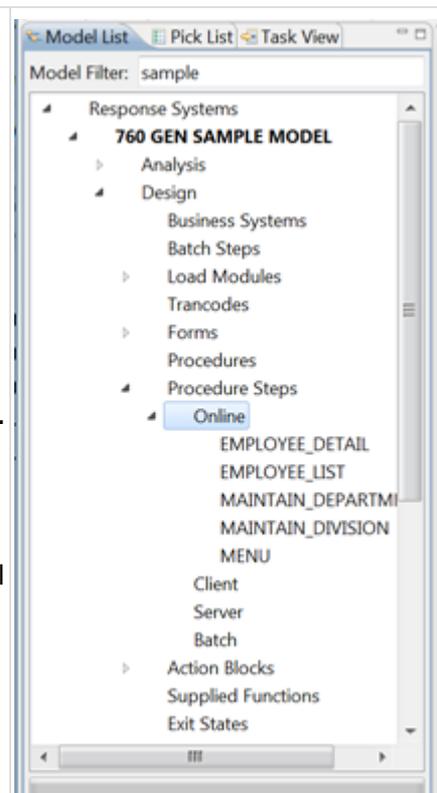
Model Explore

This pane displays all objects contained within the node selected in the Model List pane. For example, if the model name is selected the Model Explore pane will display every object in the model. If the Online (Procedure Steps) node is selected in the Model List pane the Model Explore pane will display only online procedure steps for the current model.

The Model Explore pane cannot display objects from more than one model.

The Filter field allows the user to reduce the object list to those containing the desired value, simply start typing in this field to filter objects.

Select an object by clicking it or use the SHIFT key and click to select multiple objects.

Once objects are selected, choose from the toolbar menu options, push buttons or right click menu to perform the desired feature.

The columns that are displayed for the objects listed are user configurable from OPTIONS > PREFERENCES > COLUMN PREFERENCES.

Additionally, the feature invoked by double clicking on an object can be configured from OPTIONS > PREFERENCES > GENERAL OPTIONS.

Pick List

This pane displays objects the user has specifically selected for inclusion.

The Pick List is populated by highlighting an object in a pane or report output and selecting the Add to Pick List option. Object types that cannot be added to the Pick List are Supplied Functions, Users and User Groups.

Once in the Pick List pane, objects can be removed either by highlighting them and using the Remove option or the Clear List option.

When working in the Pick List, highlighting objects is only significant when removing objects from the Pick List.

Pick List features will execute against every object contained in the list where appropriate. Choose from the toolbar menu options, push buttons or right click menu to perform the desired feature.

Add to Pick List	✚
Remove from Pick List	━
Clear List	▯

Locating Objects

Filter

To open this search, right click on a model or one of its nodes in the Model List pane and choose Filter Object(s).

The Find Options supports:

- Object Name field. Enter the full name or partial name of the object. More than one character string may be entered.

- AND/OR radio buttons. If more than one character string has been entered in Object Name then this field will determine how the strings are to be handled. NOTE that AND/OR applies only to the Object Name field.

- Member Name/Domain. If this field is populated then the character string entered is checked against the Member Name for any Action Diagram, and against the Domain type for any attribute (entity, subtype or workset type). A partial match is done so, for example, searching for TE would give you objects with domain type DATE or TEXT (or any other domain type containing TE).

- Object ID. This is used to find a single object in the model. An exact match, not a partial match, is done.

Multiple filters may be applied simultaneously to different nodes.

Filters applied to different nodes will not interact unless one of the nodes is in the branch or branches under the other. For example, a filter on Screens will not interact with a filter on Batch Procedure Steps and vice versa.

Criteria applied to a parent node will be 'ANDed' to any criteria applied to its child nodes.

If an object isn't in the tree, schedule a tree extract with the MODEL > CREATE EXTRACT TASK option. Talk to your administrator about scheduling this to run automatically.

Changed By Report

This option allows a user to nominate the desired date range to return all objects changed between those dates within the current selected model. The report will include all objects changed by any user.

Task Pane

Tasks provide a way for some features to be submitted as a scheduled job. Similar to objects, select a task to enable all features relevant to its type.

Supported features are:

- Model Extract
- Model QA Checks (Summary and Detail)
- Object QA Checks (Summary and Detail)

Both Summary and Detail Reports can be submitted to run as scheduled jobs by selecting the Run as Scheduled Task tick box on the Options window. If there are subsets or aggregate sets included and it's really their contents that need checking make sure to select the Expand Subsets/AggSets tick box. Specify the desired Task Info and click OK to submit.

Task View

The Task View pane is used to indicate one or more criteria that can be used to locate an existing task.

Expand nodes to select the desired filter values for each property. Where no selections are made, no filter is applied. For example, if no User is selected then tasks submitted by all users will be displayed.

Tasks that meet the specified criteria are displayed as a list in the Task List pane.
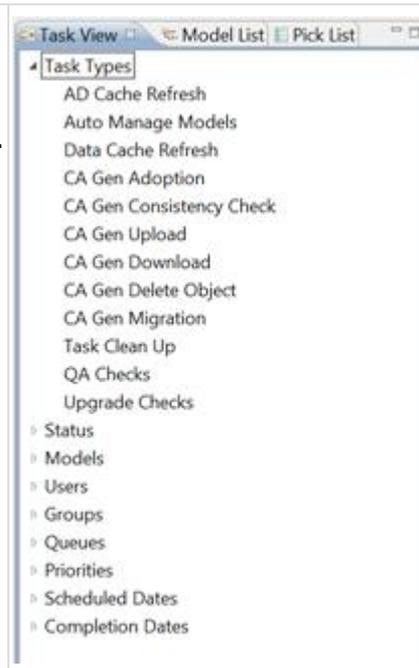
Task Status

|		
	Pending	Task is awaiting its scheduled processing start time.
	Running	Task is currently being processed.
	Completed	Task processing is complete.
	Held	Task is on hold awaiting release or cancellation.
	Cancelled	Task processing is cancelled. Only a Pending or Held task can be cancelled.
	Waiting	Task is waiting on another task.
	Locked	Task is preparing for execution.
	Failed	Task processing did not complete successfully.

Task List

Focus is automatically moved to this pane to display the output of the requested Task View criteria.

The Task List pane offers the facility to monitor, hold, release or cancel submitted tasks. As well as resubmit or view the outcome of completed tasks.

Select a task by clicking it and choose from the toolbar menu options, push buttons or right click menu to perform the desired feature.

When a task is selected, its Detailed Report is automatically displayed in the Task Details pane. This pane displays the details of a submitted task such as the type of task, submitting User id, status, queue, recurrence properties, when it was requested to run, when it actually ran and whether it executed successfully.
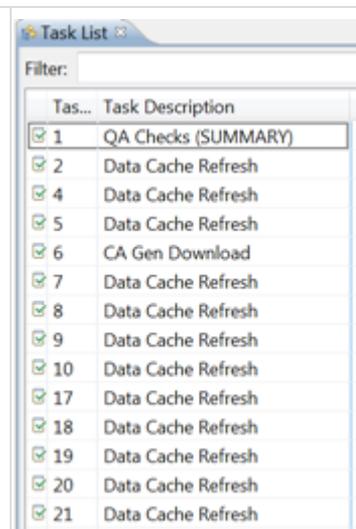
The columns that are displayed for the tasks listed are user configurable from OPTIONS > PREFERENCES > COLUMN PREFERENCES.	

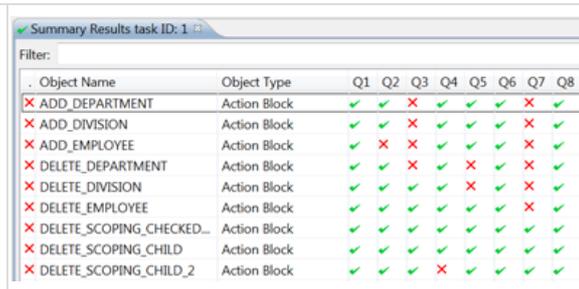## Task Features

🟥	Cancel Task	This feature will cancel a task. Only a Pending or Held task can be cancelled.
➡️	Resubmit Task	The resubmit feature offers the ability to resubmit a Cancelled, Completed, Failed or Held task for reprocessing.
📋	Task Results	The Results feature shows the output for an asynchronous task. The results will differ based on the task type - for a download or upload task, the output will be a checkout.trn or verify.trn file. Using the results feature for these types of task will prompt for the folder location where those files are to be saved. For a QA Check task, Pre-migrate Check task, adoption or a consistency check, the results feature will display the report that has been output from the process.
⏸️	Hold Task	This feature will prevent the processing of a Pending task when its scheduled execution time is reached (but not cancel it). A task placed in a Held status can be released or cancelled.
📇	Release Task	This feature will restore the status of a Held task to Pending. If the scheduled execution time has passed, the Task will execute immediately. Only the user that submitted the Task can Release it.

Task Results

Focus is automatically moved to this pane to display the results of the requested task.
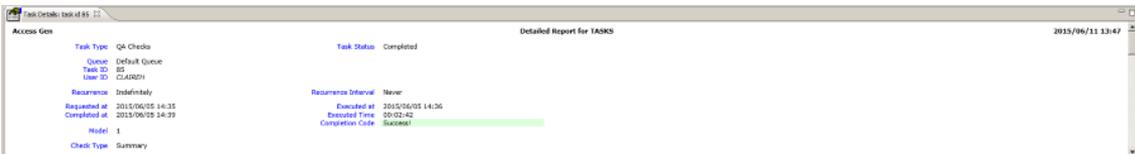
All reports are interactive. Select an object within the report by clicking it and choose from the toolbar menu options, push buttons or right click menu to perform the desired feature.

Task Details

The Information Panel is at the bottom of the window. Clicking an item in the Task List presents a summary of that report including what model it was run against and how many objects were processed.

Checking Objects

This feature can be run against models, individual objects or multiple objects simultaneously.	✔ Summary or detailed reports are available that can highlight areas where an object(s) does not conform to standards. These reports can be generated online or submitted as a Scheduled Task to run at a specified time. The progress and outcome of Scheduled Tasks can be monitored in the Task List pane.

QA reports present the user with a set of QA Checks that can be run against the highlighted object/s. Selecting to run a QA report opens the last rule set used in the current model. A different rule set can be selected in the top right drop down. Only those rule sets associated to the current model will be available. Mandatory checks cannot be deselected, they appear greyed out and are permanently selected.
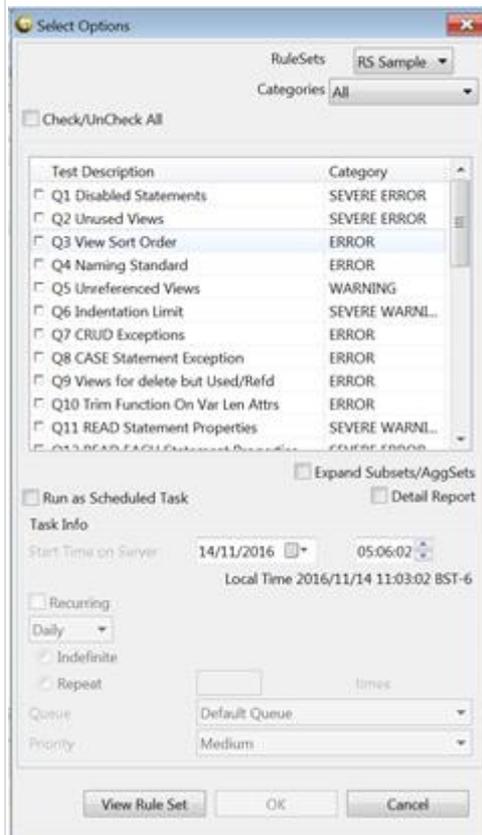
For those checks that are selected, a report is produced detailing whether the object passed or failed. If the object failed a particular check, further details are given.

The output of Scheduled Tasks are stored in the QA Tasks database for later retrieval but the output of an online task is available as soon as the task has executed in a Results tab.

Summary Report

A Summary report is a table of checked objects against selected checks showing if an object passed, failed or is of a type not applicable to the check.

The Summary Report is invaluable for gaining a high level understanding of affected objects and highlighting areas of concern. The Summary report option is chosen by deselecting the Detail Report check box on the window.

When a collection of objects changed for a unit of work are first uploaded, it provides an ideal springboard to request Detailed Reports for those objects that fail one or more checks. Highlight the failing objects (click on the Summary column to bring all failing objects to the top) and right click.

Detail Report

After a Summary Report highlights objects that need attention, the Detail Report gives the greater level of detail often required to pinpoint why an object has failed a check. For instance, if an Action Block fails a statement related check, the report shows the statement in error - critical information when there are several similar statements but only one is wrong!

The Detail Report also serves as a Compliance Certificate when work is ready to be submitted for signoff. It records what checks were run and when, the objects they were run against and the selected rule set so reviewers have everything they need to certify the work. Running the report as a Scheduled Task stores the output against a unique Task ID which all reviewers have access to.

Model Level QA Check

This feature is a model report.	✔	The Model Level QA Check feature presents the user with a set of QA Checks that can be run against an entire Model or all objects of the types selected in the Query Criteria pane for the current Model. For instance if all Action Blocks and Procedure Steps are to be checked the required Model is selected, the Procedure Step and Action Block checkboxes checked, and then the Model Level QA Check push button is pressed. If all object types are to be tested, then select the "All Object Types" option.

Two methods of outputting the results are available:

1. Summary Table - this option takes all checked objects and indicates whether they passed or failed the selected check(s) in a Pass/Fail matrix.

2. Detailed Report - this option takes all checked objects and produces a more detailed report including the checks selected, those NOT selected and the details of check failures.

This feature can be run either online or scheduled to run as an asynchronous task, the latter being recommended for Model level checking. Their progress and outcome can be monitored in the Task List pane.

Refer to the Technical Guide for details on the authority required to execute this feature.

Options and Preferences

There are a number of options and preferences that can be set in the Client. These options are set for all instances of the Client installed on a workstation.

These settings are reached by selecting the OPTIONS > PREFERENCES menu option.

Tracking Licence Usage

An Audit Report displays usage information. Administrators can use this to see the licence details and which users have logged on and when. It is available under the OPTIONS > PREFERENCES > AUDIT REPORT menu option to those with the necessary authority.

CSEConfig

If the configuration information needs to be changed after installation for any reason this can be done from the CSEConfig tab given the user has sufficient authority to do so.

Client Configuration

The Client's configuration can be changed after installation, for instance if the Server is relocated the Address/Port can be modified here so that the Client can connect to the new Server.

Additional Client configurations can also be added to enable a client to connect to more than one Server.

Server Configuration

Admin users are able to change the Server's configuration from the Server Configuration tab.

Settings that might be changed from here are the Cache location (Please note: this path is relative to the Server), Enforcing Model Authority, updating the configured Encyclopedia database password (used by the Server) if the password is changed on the database and applying a new licence.

For most of these settings the Server must be stopped and restarted for the changes to take affect.

For further information regarding the Server Configuration please refer to the Server Installation section in the Technical Guide.

Server Trace Settings

Various trace settings can be set here to assist Support with any support issues. These settings should only be changed with assistance from Support.

PreLoad Models

Models added to the list of pre-loaded models are loaded into memory when the Server is started. This improves performance when these pre-loaded models are first accessed by the Clients.

Please stop and restart the Server for the Pre-Load setting to take effect.

Collect Diagnostics

Selecting the "Collect Diagnostics" option will retrieve log and environment information files from the Server and Client to aid Support with any support issues.

The location of the .7z file containing all these logs will be displayed at the bottom of the panel.

Column Preferences

Select the optional columns to be visible in the Explore Model and Task List tabs. This allows the user to see only the information that is relevant to their needs.

Install Update

Use these settings to determine when and how updates are applied to the Client.

Restore Options

Under the Window menu, there are a number of Restore menu options to reinitialise changed settings to the default values and re-open closed panes.

Restore Defaults:	Reinitialises changes made to settings within Options -> Preferences to their original values.
Restore PickList:	Re-open the Pick List pane if it has been closed.
Restore TaskView:	Re-open the Task View pane if it has been closed.
Restore Explore Model:	Re-open the Explore Model pane if it has been closed.
Restore Task List:	Re-open the Task List pane if it has been closed.
Restore Welcome:	Re-open the "What's New" welcome panels.

Printing and Saving

When the Summary Report is in focus, to print or save the report highlight the required rows and press the Print or Save push button. When a Detailed Report is in focus, printing or saving outputs the entire report regardless of what is highlighted.

Contact Us

If you need more information or assistance please visit our website at:

http://www.response-systems.com

We welcome your feedback and suggestions.