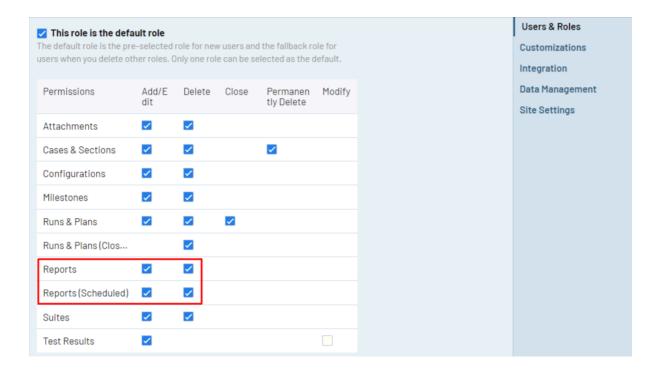# Milestone (Summary) report

# Overview

The Milestone (Summary) report allows users to attach project criteria and quickly visualize a clean, shareable interpretation of milestone activity. Visualize a high-level view of milestones activity, to share, by opening a "Milestone summary" report and using the default fields to select which milestones to summarize.

# Creating a Milestone (Summary) report

## Prerequisites

Please make sure you have the following permissions enabled for your user role.



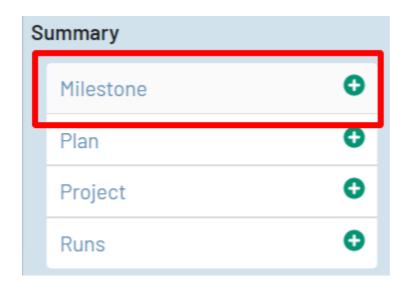For more details, please check out the [managing user roles and permissions](#) guide

## Steps to create a Milestone (Summary) report

To generate the Milestone (Summary) report in TestRail, you need to put a few configuration settings in place.

Navigate to the project for which you would like to create a test report. Then, navigate to the **Report tab**.



On the right side, you will see a pane titled **Create a Report.** Click on **Milestone** report under the **Summary** section.



On Add Report page, you will find 3 main sections:

- ✓ Name and Description
- ✓ Report Options
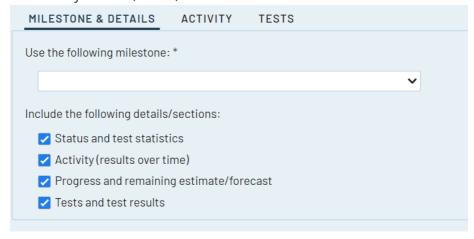- ✓ Access & Scheduling

Follow the below steps to configure each section

**1** **Name and Description**
Enter the report's name and description in their respective fields.

**2** **Report Options**
On the Add Report page, scroll down to **Report Options**. Here, you will see three tabs, MILESTONE & DETAILS, ACTIVITY, and TESTS.
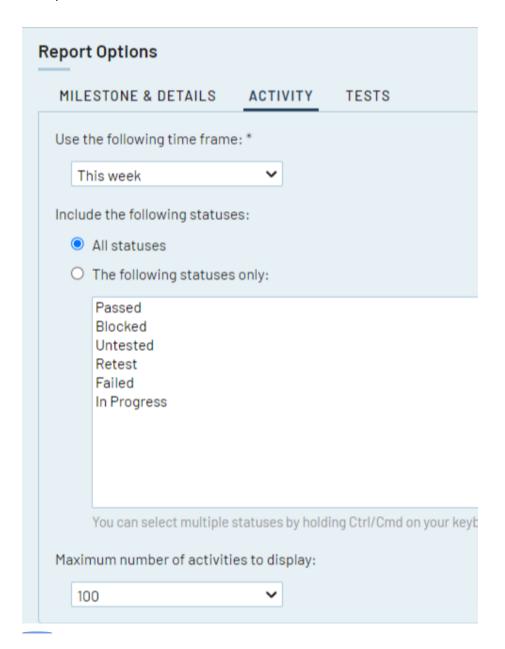
**MILESTONE & DETAILS**

On the MILESTONE & DETAILS tab, you can select the milestone you want to use for the report from the dropdown menu.

You can also select the general sections to include in the report: *Status and test statistics, Activity (results over time), Progress and remaining estimate/forecast, Tests, and test results*.

MILESTONE & DETAILS    ACTIVITY    TESTS

Use the following milestone: *

Include the following details/sections:
- ☑ Status and test statistics
- ☑ Activity (results over time)
- ☑ Progress and remaining estimate/forecast
- ☑ Tests and test results

**ACTIVITY**

You can select the time frame for the report. You can select between today and past dates.

**Report Options**

MILESTONE & DETAILS    ACTIVITY    TESTS

Use the following time frame: *

This week

Include the following statuses:
- ⦿ All statuses
- ○ The following statuses only:

Passed
Blocked
Untested
Retest
Failed
In Progress

You can select multiple statuses by holding Ctrl/Cmd on your keyb
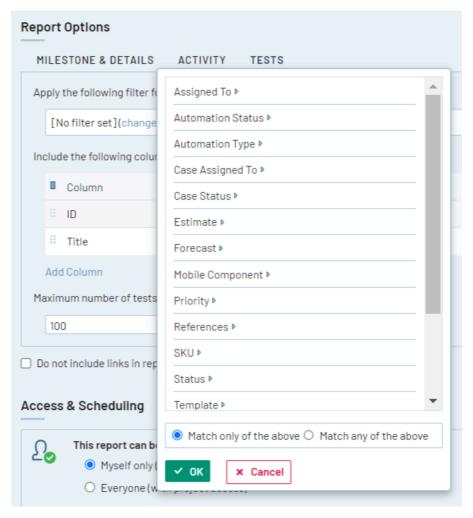
Maximum number of activities to display:

100

1. You can select the time frame for the report. You can select between today and past dates.

2. By default, all test cases are included. To show only test cases with specific statuses, hold *ctrl + click* one or more: *Passed*, *Blocked*, *Untested*, *Retest*, *Failed*, *In Progress*.

3. Select the maximum number of activities to display on the report, (from newest to oldest). *10*, *25*, *50*, *100*, *250*, *500*, or *1000* (maximum).
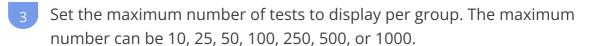
**TESTS**

You can do the following under the TESTS tab:

1. Filter the tests to be displayed in the report by any case field—including custom case fields—except text fields, like Assigned to, Estimate, Priority, etc.



2. Choose the column(s) to include in the tables displaying tests' information in the report. The default columns include ID and Title. Depending on the information you want to display, you can add additional columns such as Type (of the test), Priority, etc.

3   Set the maximum number of tests to display per group. The maximum number can be 10, 25, 50, 100, 250, 500, or 1000.

3   **Access & Scheduling**

This section enables users to set access and scheduling options. For more details, please refer to the [General configurations](#) guide.

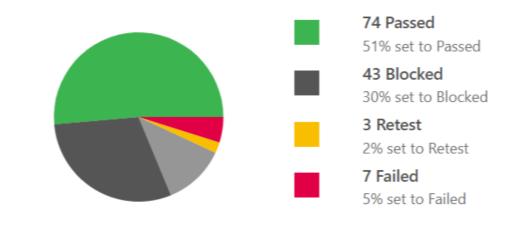Finally, scroll down and click **Add Report** to generate the report.

# Reading a Milestone (Summary) report

It may take minutes to generate your report depending on the data included. However, once the report is fully generated, the next thing is to view and interpret it. To view the report, go to your **Reports** tab and click on the appropriate report under the list.

## Milestone & Details

**Status and test statistics** – A quick view into whether the milestone is complete, how many test cases are marked as Passed, and how many have not yet run. Typically, a milestone is completed when there are no more untested items.

## Milestone: App Release Version 4.0



**74 Passed**
51% set to Passed

**43 Blocked**
30% set to Blocked

**3 Retest**
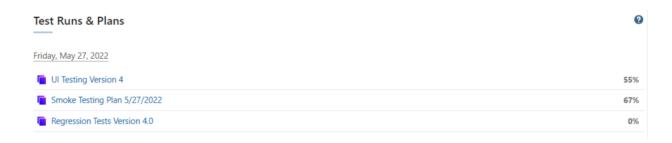2% set to Retest

**7 Failed**
5% set to Failed

## 51%
passed

17 / 144 untested (12%).

If you hover over a section of the pie chart, you can see an overview of the number of test cases and the percentage of all test cases on the report.
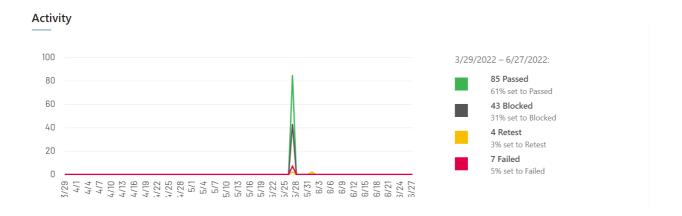
Underneath the chart, you can see a list of test plans that were created for the milestone. Each of the rows shows a test plan with the percentage of test cases marked Passed on the right column. You can click the test plan titles to open a details page for each.

### Test Runs & Plans                                                    ❓

Friday, May 27, 2022

| | |
|---|---|
| 📑 UI Testing Version 4 | 55% |
| 📑 Smoke Testing Plan 5/27/2022 | 67% |
| 📑 Regression Tests Version 4.0 | 0% |

# Activity

**Activity (results over time)** – A snapshot of statuses for all test cases that ran during the time frame you selected on the Activity tab during configuration. The
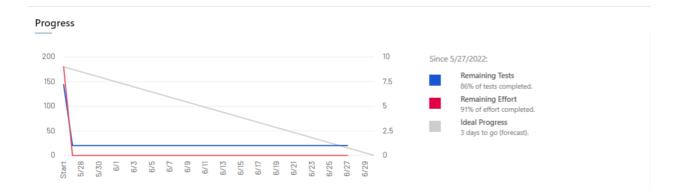
overview of the test case activity is shown as a graph.  Users can see details about test status per day, by hovering over the peaks of each line.
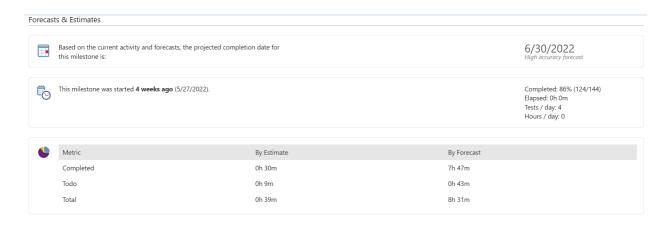
**Activity**



Underneath the graph is a list of all test cases that ran for the milestone, including test results and sorted by the date each test ran. To the right, each row includes the name of the user who ran the test or the name of the user who manually marked the test case as *retest* or *blocked*.



**Progress and remaining estimate/forecast** – A view of remaining tests to complete and remaining effort needed, against ideal progress.

The high-accuracy forecast further breaks down the projected completion date based on current activity and forecast, giving team leaders a side-by-side hours estimate of progress.



Underneath Forecasts & Estimates is a list of test plans, and their forecast dates on the right column. The titles link to detail pages for each test run or plan.
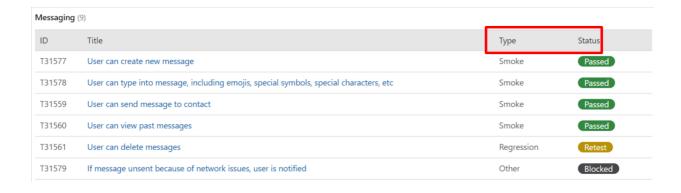


# Tests

**Tests and test results** – List of tests organized by test run. Each line includes test ID, name, status, and any other columns the user added when configuring the report. Clicking the ID or Title will open a details page for that test case. Each row lists details in the Type column based on what was selected when each test case was created.

In addition to test ID and title, you'll see columns the user included during configuration to the right of the table.



**NEXT >**
Plan (Summary) report