

# Jira for CRM team



## Why Jira?

Change is always difficult at the beginning. Time permits us to better accept changes. Migrating to JIRA is our first chance to be opened to the world of agility.

Shorter release cycle. Simplification on ticketing tools. Reknown and standards of the market. Standardisation of major platforms like Core CRM and iCARE. Continuous integration tools among developers. Structured way of doing tests. Better visibility of tests performed and the results.

This move is one step ahead for transformation. To better prepare us to take new challenges!

**YES WE CAN!** 😊

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### Useful links:

- [Link to ppt](#)

## 1.Lost in JIRA as I used to work thay way...tell me more!

Used to be in PMO...	...Going to be in Jira
Requirements	Story (issue type)
Defects	Bug (issue type)
Test scripts	Test (issue type)
SFDC process	Epic (issue type). Remember to assign issue to an Epic!
Release	Fix version (field). In order to assign issue to a release, first needs to create a release record by Change Manager
Urgent change - quick and small hot fixes that are pushed to production quickly	Create as either Story or Bug. Each move-to-production has to be a release. Urgent change is tied to a minor release

**A Backlog is a list of issues in the pipeline, waiting to be qualified and assigned to a sprint.**

# Backlogs

**Backlog**

CEP board

Quick filters ▾ Assignee ▾

Test View ▾ ...

3d 3h 2w 2d 3h 30m 0 Plan sprint ▾ ...

Mouse roll over to see number of issues owned by each member

Quick indicator to show those still in TODO (grey), In progress (blue), done (green)

Workload estimation

User stories linked to EPIC (process)

CEP board

**Backlog**

19 issues

Sprint 0 preparation for a PROTOTYPE release

07/Mar/18 5:43 PM - 30/Mar/18 6:43 PM

As a distributor (GPM: Global Product Manager), I want to view business opportunities created by Solvay distribution manager in the CRI

Distributor has an access to the list of opportunities (open or closed)

Distributor views the detail of an opportunity

As a distributor, I report the advancement on the shared opportunities with Solvay through the chatter

As a distributor, I am notified when there is a new message in the chatter

As a distributor, I am notified when the opportunity is edited

Direct hyperlink to solvay-eCommerce for reordering

Analyse as-is customer notion

Functional design on security model

Functional design on data sharing model

As a distributor, I want to be able to log in so that I can access secured areas

As an administrator, I need to grant user permission/configuration to each registered user

Analyse as-is sample request process

Functional design on sample request management

Opportunity Manageme... CEP-9 ↑ -

Opportunity Manageme... CEP-13 ↑ 2d 4h

Opportunity Manageme... CEP-14 ↑ 5h

Opportunity Manageme... CEP-10 ↑ 30m

Opportunity Manageme... CEP-11 ↑ 30m

Opportunity Manageme... CEP-12 ↑ 1h 30m

Security CEP-67 ↑ 1h

Security CEP-68 ↑ 1d

Security CEP-82 ↑ 1d

Security CEP-56 ↑ 1h

Security CEP-58 ↑ 1d

Sample Request Mana... CEP-59 ↑ 1d

Sample Request Mana... CEP-60 ↑ 1d 6h

**A Sprint can be planned ahead and issues can be assigned to planned sprints.**

**At any time, you cannot have 2 sprints running at the same time.**

**You need to complete a sprint before to start another one.**

**Backlog** 22 Issues

Create sprint

Arroma: New rules for Customer request	P9 - Customer Request ...	CCCME-977	↑	-
Community: Doc mgmt - PDF rendition	P24 - Community	CCCME-949	↑	-
Community: Doc mgmt - TDS	P24 - Community	CCCME-913	↑	-
Add the Lead creation from the SFDC panel in gmail		CCCME-972	↓	-
Automatize Qlikview Access	PC - Security Model	CCCME-971	↑	-
Soda Ash: Business rules & queue members review	FALL '18 RELEASE - R... P - Cross Processes	CCCME-934	↑	-
Creation of new roles for Peroxide GBU	PC - Security Model	CCCME-952	↑	-
Add ability to edit closed complaints to Quality Manager	P6 - Complaint Manage...	CCCME-953	↓	3h
Transactionan pricing approval	P14 - Transactional Pri...	CCCME-954	↑	-
Improve send e-mail internally for visit report	P18 - Visit Report Mana...	CCCME-955	↑	-
Novecare SFDC CS Roles structure amendment	PC - Security Model	CCCME-956	↑	-
Home Page - LEX Rework	P - Cross Processes	CCCME-964	↑	-
Contact Language picklist	P1 - Account and Conta...	CCCME-965	↓	1m
Add "Add default team" button on Account	P1 - Account and Conta...	CCCME-966	↓	4h

**An active sprint is the current running sprint.**

## Active sprint - board review (daily scrum)

**Sprint 0 - PROTOTYPE** 6 days remaining Complete sprint Test View ...

Sprint 0 preparation for a PROTOTYPE release

Quick filters Assignee

TO DO IN PROGRESS DONE PRE UAT UAT

- Opportunity Management 13 issues
- Sample Request Management 3 issues
- Document Management 2 issues
  - Analyse as-is document management process/repository (Document Management) 4h CEP-65
  - Functional design on document management (Document Management) 1d CEP-66
- Security 15 issues
- Single-Sign-On 3 issues
- Issues without epics 1 issue

Number of issues grouped by EPIC

For an active sprint (or release), daily scrum to see each tasks move from one status to another

## Workload estimation and time logged

CEP-14

**Distributor views the detail of an opportunity**

Edit Comment Assign To Do In Progress Workflow Admin

Type: Story Status: IN PROGRESS (View workflow) Assignee: Rui Miguel Horta Coelho da Silva

Priority: Medium Resolution: Unresolved Reporter: Li Lian TAN

Component/s: None Labels: None Votes: 0

Epic Link: Opportunity Management Sprint: Sprint 0 - PROTOTYPE Watchers: 1 Stop watching this issue

Created: 12/Mar/18 10:14 PM

Updated: Yesterday

**Time Tracking**

Estimated: 5h

Remaining: 4h

Logged: 1h

Workload estimated at 5h. Developer can log work, indicating how much time spent, and gets updated for remaining

**A Test is an issue type. When you create a Test, it has other properties of a Test Case.**

**It lists down the Test Step, Test Data required to execute that Test Step, Expected result of the Test Step.**

**You can only include an attachment to a step should it require graphical verification.**

# Test (issue type)

**User story test case**

Type: Test      Status: TO DO (View workflow)      Assignee: [User]

Priority: Medium      Resolution: Unresolved      Reporter: Li Lian TAN

Affects Version/s: None      Fix Version/s: Fall '18 release, Winter '19 release

Labels: None

**Description**  
Click to add description

**Test Details**

Test Step	Test Data	Expected Result	Attachments	Action
1. Login as a partner community	Use "Test Partner" user	Login page is displayed	+	...
2. Enter username and password. Click on login		When login, arrives in homepage	+	...

Prev 1 of 1 Next

Add

Assign to versions

List of test steps defined for a test case

Easily add new test steps whenever requirement/user story evolve

Test cycle contains a list of all the Test issues that need to be executed.

Test cycle can be easily created and then clone, for example, the same test cycle cloned for Devpro and UAT.

For a given Test cycle, we have a good visibility of all tests executed and it's percentage of passes/fails.

# Test cycle view

test project  
Software project

Reports

scrumboard TP

Burndown Chart  
Burnup Chart  
Sprint Report  
Velocity Chart  
Cumulative Flow Diag...  
Version Report  
Epic Report

Test Summary    Cycle Summary    Traceability

▼ Cycle Summary

Search the tree...    +

▼ All Versions

- ▼ Unreleased
  - ▼ Unscheduled
  - ▼ Fall '18 rele...
  - ▼ UAT User te...
    - Ad hoc
    - Winter '19 r...

Cycle Name: UAT User testing

Build:	Environment:	Created By: Li Lian TAN
Start Date:	End Date:	Total Folders: 0
Total Executions: 0	Total Executed: 0	Cycle Executions: 1
Description:		Total Unique Defects: 0

ID	Status	Summary	Defect	Component	Label	Executed By	Executed On	Actions
TP-12	UNEXECUTED	User story test case						E

Test cycle = test session created

Test cycle contains list of test cases. A view of all test cases ran, showing defect, and status of tests.

Tester click on "E" for test case execution

# Tester: Execution view

test project \ Fall '18 release \ UAT User testing \ TP-12

Return to Test  
Return to Test Cycle

User story test case

Description

Test Execution

Execution Status: UNEXECUTED

Assigned To: Add assignee

Defects: Enter defects

Comment: Enter comment

Attachments (Execution)

Test Details

Test Step	Test Data	Test Result	Attachments	Comment	Attachments (Execution)	Defects
1	1. Login as a partner community user	Use "Test Partner" user	Login page is displayed	UNEXECUTED	+	Enter defects
2	2. Enter username and password. Click on login	When login, arrives in homepage		UNEXECUTED	+	Enter defects

Transition

Allows you to move from one status to another

CCCME-898

Community: Customer Request

Edit Comment Assign Estimation completed Close issue Admin

Type: Story

Affects Version/s: None

Component/s: None

Labels: cep

Epic Link: P9 - Customer Request Management

Sprint: Fall'18 release

Status: UNDER REVIEW (View workflow)

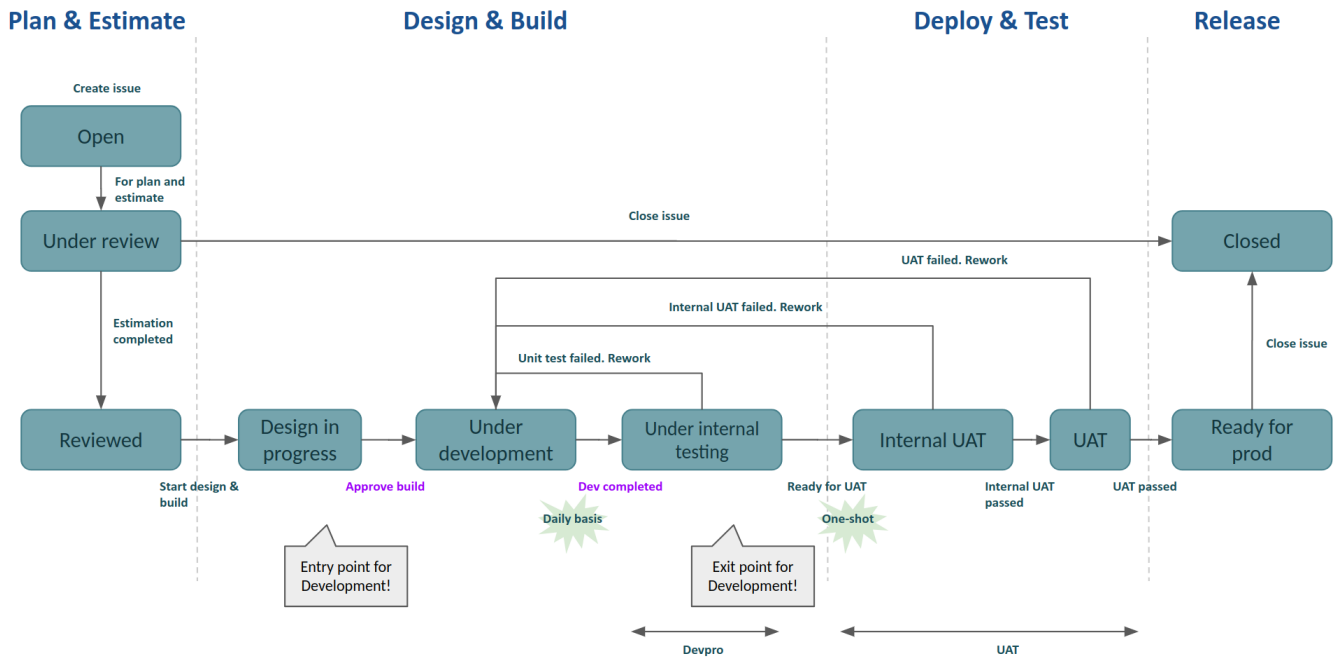
Resolution: Unresolved

Fix Version/s: Fall '18 Release

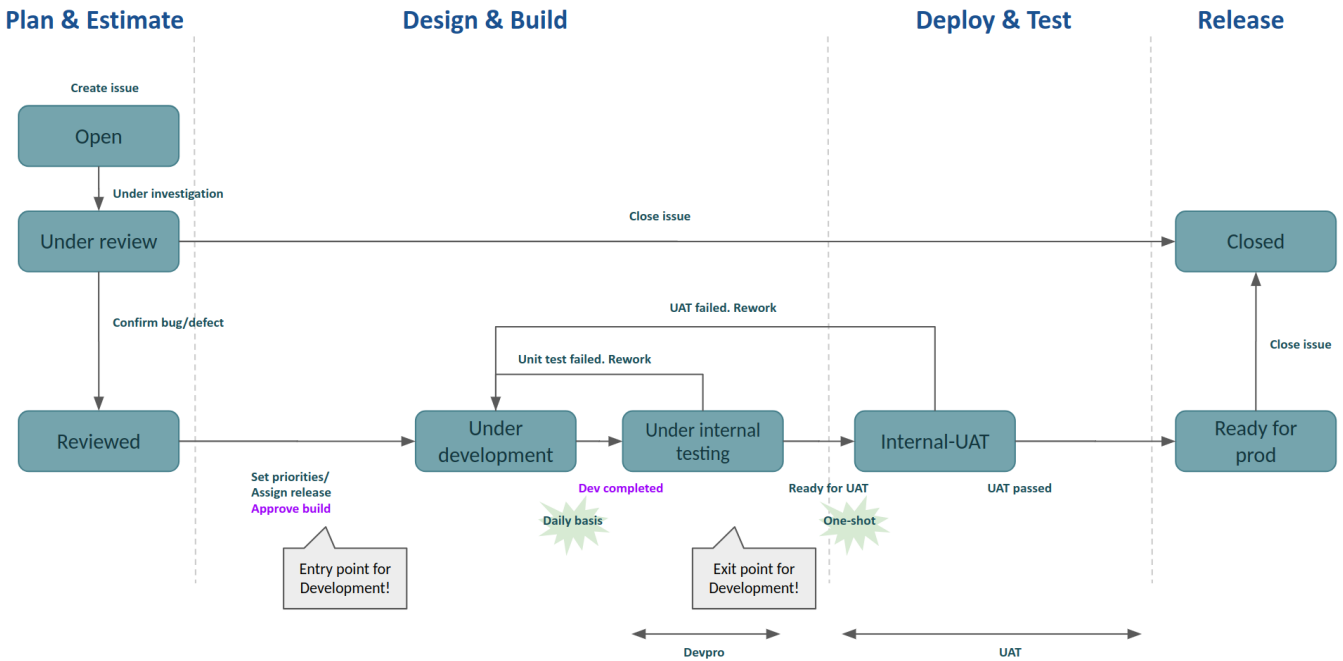
**Workflow Status**  
At which status of the release cycle does the issue belongs to

## 2.0 Workflow

### 2.1 Requirements/Story workflow



## 2.2 Defects/Bug workflow



## 2.3 Detailed activities in the issue lifecycle

## Plan & Estimate

Anybody can quick-create issue.  
Update and better describe issue by Func Lead.  
High-level estimation by Developer.  
Agreed by Func Lead.  
Once OK, Func Lead set to "Reviewed" for release planning.

## Design & Build

Change manager assigns for a release.  
Detailed description by Func Lead if required.  
Create Test issue/associate Test to Story.  
Detailed solution by Developer. Submit for review.  
Tech Lead approve build.  
Developer develops.  
Once development completed, notify Tech Lead.  
Code review in Bitbucket by Tech Lead.  
Security review in Bitbucket by Security.  
Once OK, Tech lead set to "Under internal testing".  
Assign to Deployment manager.  
Deploy in DEVPRO.  
Func Lead and Developer perform early testing in Devpro.  
Rework issues if any.  
Change manager prepares Test Cycle (test scope for the release) and associate Tests to the Test Cycle.

## Deploy & Test

Based on Test Cycle, IS testers from Adoption execute Tests.  
Logs pass/fail in Tests.  
Once all completed, IS testers notify Change manager.  
Test review by Change Manager, Func Lead and Developers.  
Rework what is major. Create new bug/defect to be treated if minor.  
Adoption Lead schedules meeting with Key Users for tests. Explains upcoming changes.  
Based on same planned Test Cycle, key users perform test in UAT.  
Logs pass/fail.  
Those pass, set status to Ready for prod.

## Release

On release day, Deployment manager deploys to PROD.  
Change manager/Adoption Lead closes issues.  
Communicate release note to Key users/others



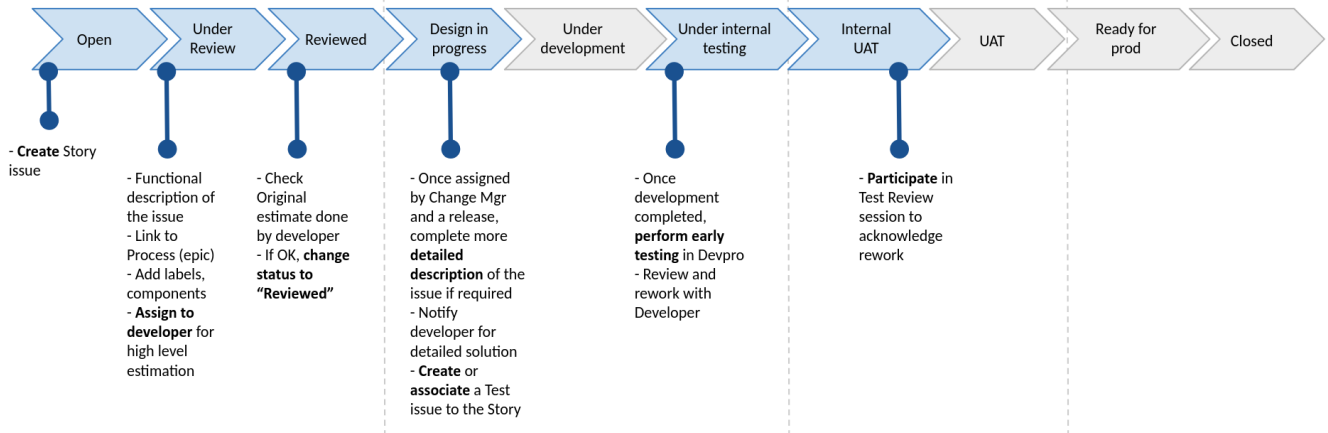
## 3.0 Step-by-step guidelines

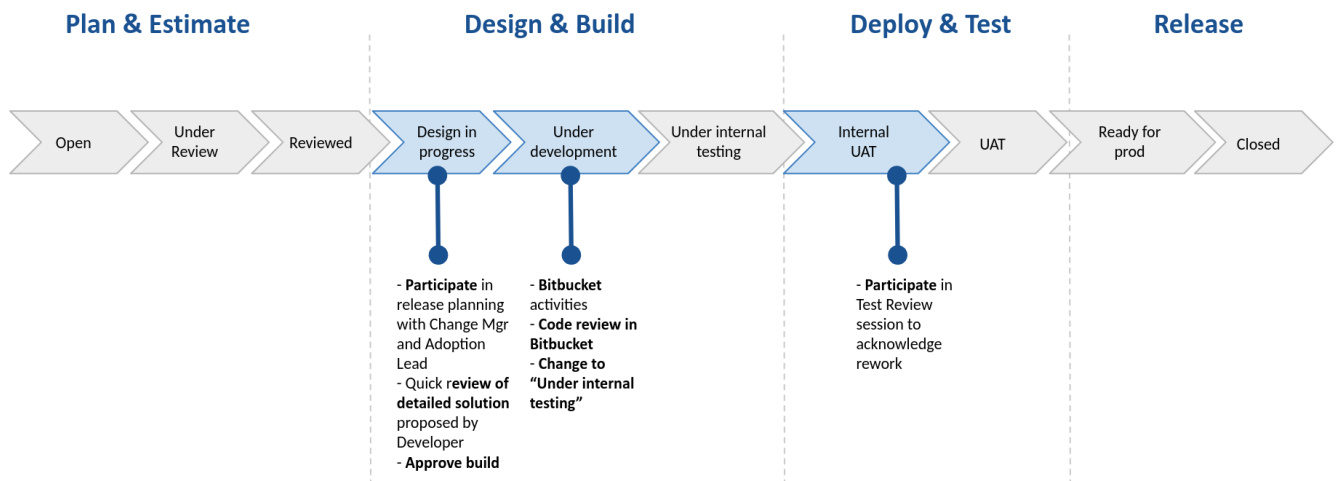
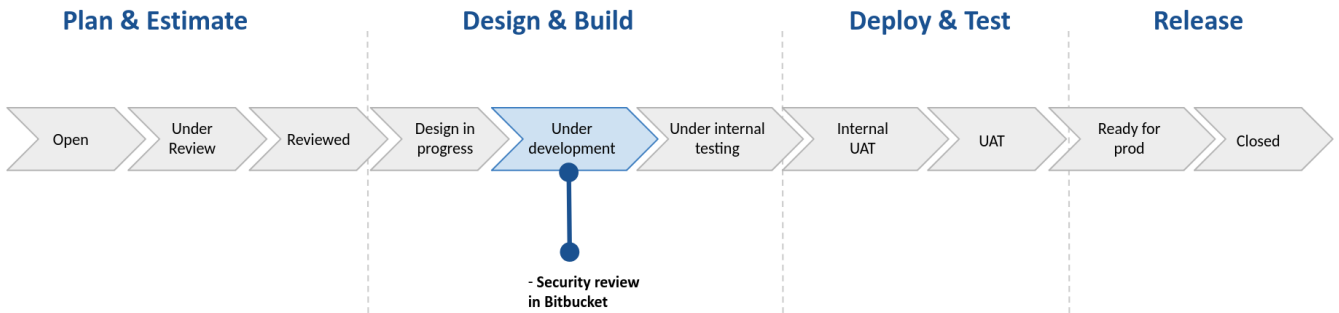
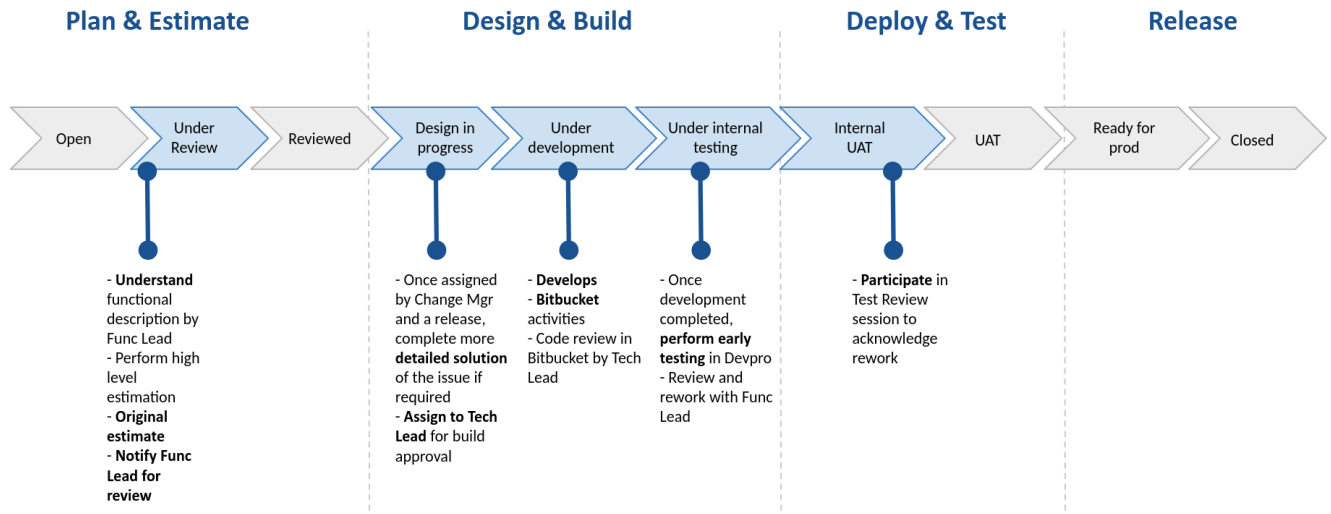
### Plan & Estimate

### Design & Build

### Deploy & Test

### Release



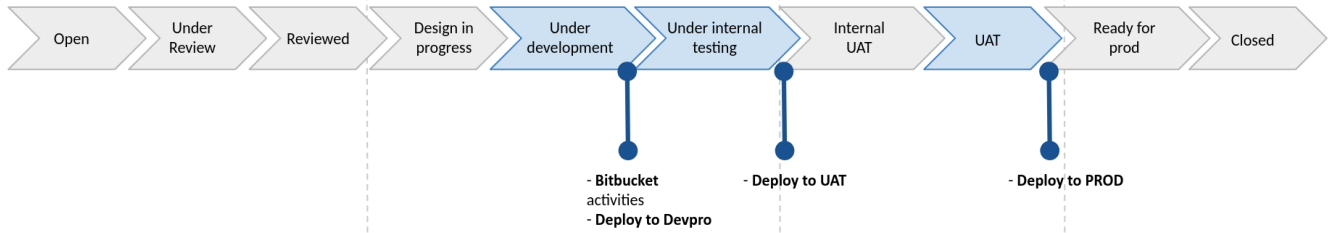


## Plan & Estimate

## Design & Build

## Deploy & Test

## Release

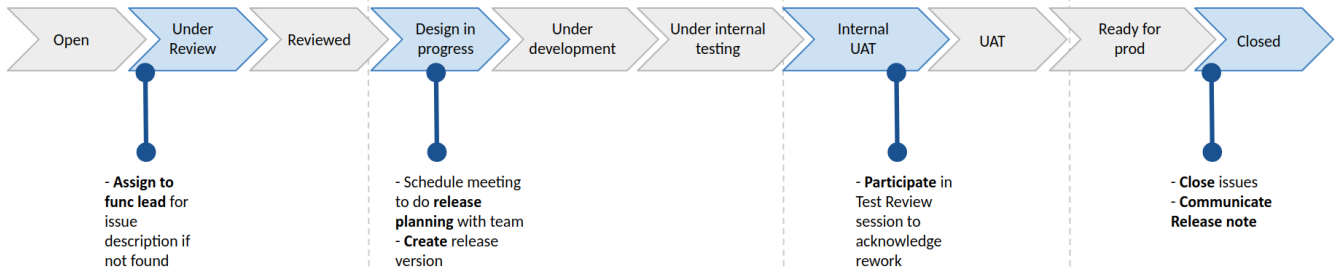


## Plan & Estimate

## Design & Build

## Deploy & Test

## Release

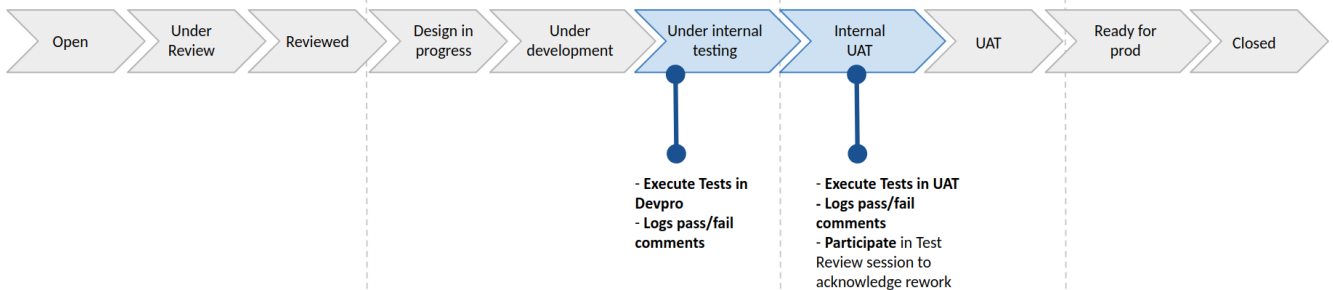


## Plan & Estimate

## Design & Build

## Deploy & Test

## Release

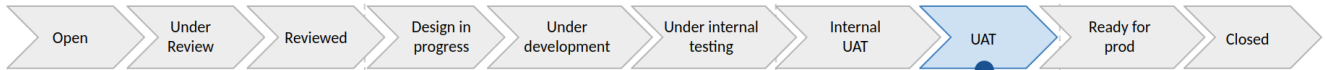


## Plan & Estimate

## Design & Build

## Deploy & Test

## Release



- Execute Tests in UAT
- Logs pass/fail comments
- Participate in Test Review session to acknowledge rework