Project Management using Jira

- START A DAAI PROJECT STRUCTURE FOR THE MOMENT
- Structure
  - Item type:
  - Sub item type:
  - Risk :
- PMO activities included
- Creation of views
  - Project filter:
  - Project's Risk filter:
- Project structure example:
    - Robustify :
  - Jira Project explanation
    - Content
    - Quick link:
      - Board showing kanban and timeline :
      - A Dashoard
      - A roadmap :
  - Creation of a new project:
    - Structural solution that is in place
  - Evolution of the Epic status
  - Automation
  - Access Right

START A DAAI PROJECT STRUCTURE FOR THE MOMENT

1. Create a "Portfolio Epic" type of item.
2. Fill all information that are available and then select the right phase.
    a. PMO activities should be created automatically. If it isn't the case please contact Simon Bourguignon .
3. Create Epic/Feature for all feature that has to be include as part of the potential scope of the project
4. Follow-up on PMO activities to have the project going till the delivery phase
    a. Tasks linked to the PMO activities are created automaticaly while going through the different phases.

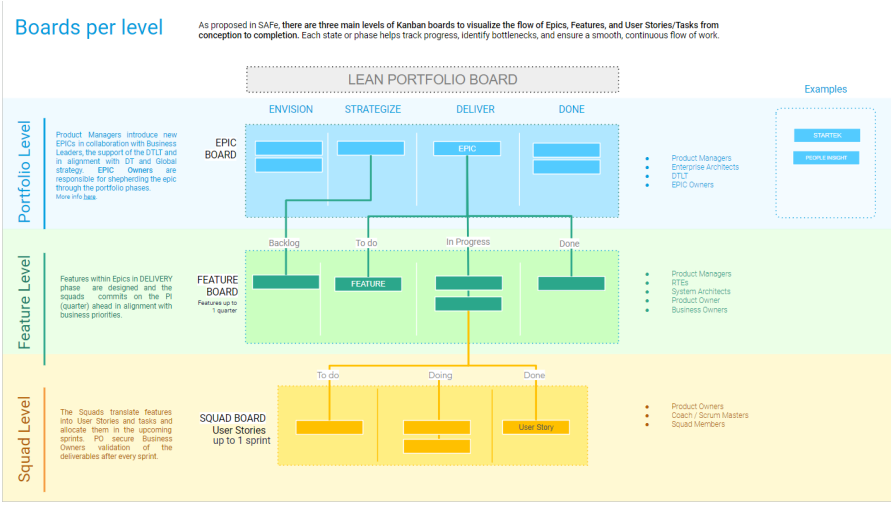
issuetype	issuekey	summary

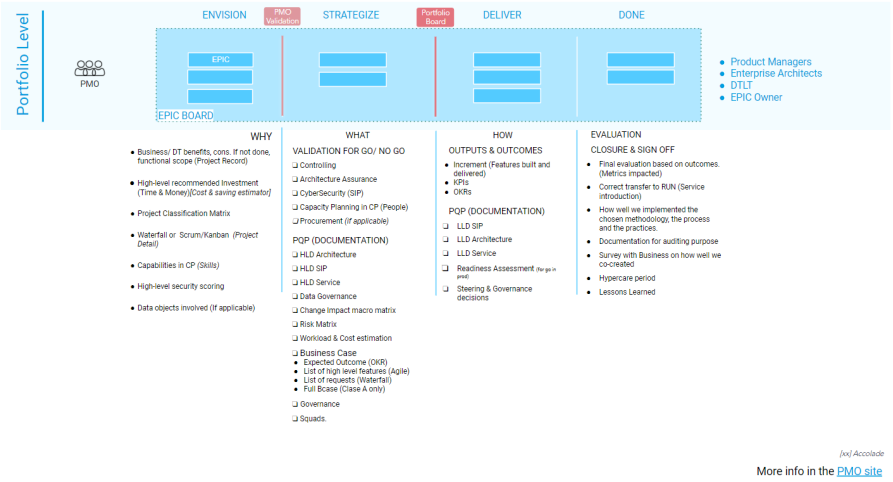
> ⚠ Unable to locate Jira server for this macro. It may be due to Application Link configuration.

5. The Scrum Master (or someone else) should request a dedicated Jira project.
    a. If it isn't the case you can continue to use the DAAI project

Structure

There are a lot of information available within the DT Playbook. This is a high level overview of the entire DT organization and allow to understand the link with the model put in place within the data platform.



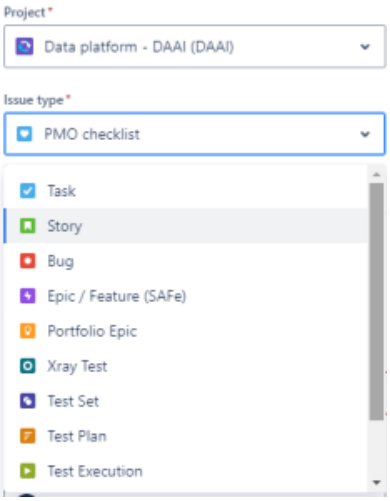


A project must be structure as below for the moment. We are currently within a transition period because the tool version and feature will evolved within the next few months.

There is an ongoing work at Company level to enhance the current setup. This structure will slightly change during the following weeks/months.

Item type:

There is a few type of tasks you can create within Jira for the moment:

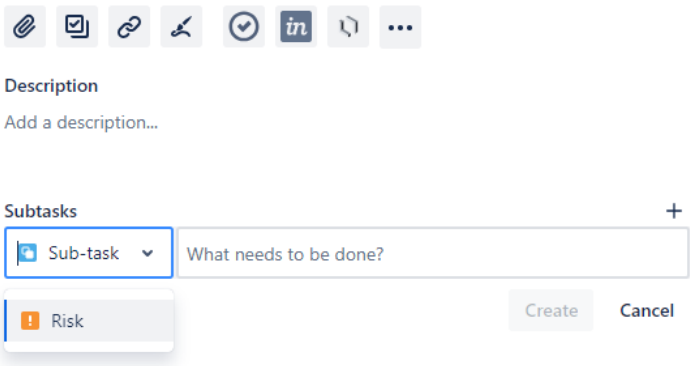


Xray related items are all linked to the testing phase.

Name	Description
Xray Test	This is the Xray Test Issue Type. Used to define test cases of different types that can be executed multiple times using Test Execution issues.
Precondition	This is the Xray Precondition Issue Type. Used to abstract common actions that must be ensured before the test case execution. A Precondtion can be associated with multiple test cases.
Test Set	This is the Xray Test Set Issue Type. Creates a group of test cases. Used to associate all included Tests with other Xray issue types like Test Execution and Test Plan. A Test Set can also be associated with a requirement issue to provide coverage and test status.
Test Plan	This is the Xray Test Plan Issue Type. Used to define the scope of test cases for a given test campaign and to aggregate all executions for those tests displaying the latest result for each test case.
Test Execution	This is the Xray Test Execution Issue Type. Used to execute test cases already defined.
Sub Test Execution	This is the Xray Sub Test Execution Issue Type. Used to execute test cases already defined. A Sub Test Execution can be created for a parent issue like a requirement in order to execute the test cases associated with it.

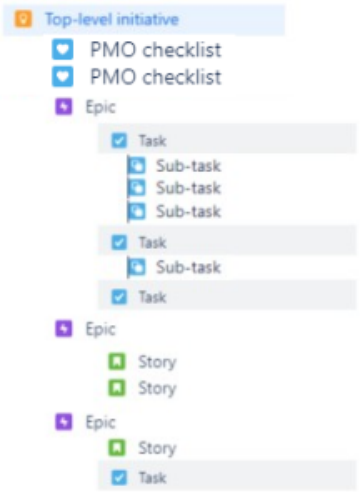
Sub item type:

There is two type of subtasks



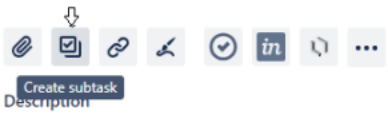
1. The High level one is the ***Top level initiative*** . It is used to capture the main information related to a project.
   ## The usage of this item aims to ease the reporting and link creation between all items of a define project. This is partially achieved for now.
2. Below the Top level initiative we are using Epic to display the organisation of the project and backlog.
   a. A ***PMO checklist*** item type for each phase that would be used to manage the PMO - Admin task. This is created automatically in most of the cases
      This item is using a Kanban process (Backlog, In progress, Done) for all tasks below it. Those task are mainly create automatically.
   b. Other ***Epic / Feature*** that are used for project content.
      i. This must follow the standard define here:
3. Below each Epic they are two types of item. There is a general agreement to use them.
   a. User Story - It is used for delivery activity that is organise by Sprint - The standard explanation is available here:
   b. Task - It is used for all activities that is organise through a Kanban model (Backlog, In Progress, Done).

Globally it means we are having the following structure based on item types.

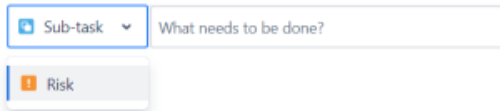


Risk :

A risk must be linked to a Task or User Story. It must be created from the related item and using the below button.



Select the Risk type and chose a self explain name



If you are managing a Jira project outside the Jira DAAI platform one you might not have that item type for the moment.

Nevertheless an item within the DAAI Jira must be created so you can create the risk under that structure.

To explore: https://solvayagile.atlassian.net/plugins/servlet/project-config/EBR/administer-components

Atlas project orga: https://team.atlassian.com/project/SOLVA2-15/updates

PMO activities included

There is automation in place in order to create the PMO activities based on the status of the "Portfolio Epic".

- TEMPLATE - create Study Backlog structure - (DAAI-5855) related activities

issuekey	summary	issuetype	created	updated	duedate	assignee	reporter	priority	status	resolution

⚠ Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- TEMPLATE - Checklist in Envision - For status "Envision" (DAAI-5329) related activities

issuekey	summary	issuetype	created	updated	duedate	assignee	reporter	priority	status	resolution

Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- TEMPLATE - Checklist in Strategize - For status "Strategize" (DAAI-5334) related activities

issuekey	summary	issuetype	created	updated	duedate	assignee	reporter	priority	status	resolution

Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- TEMPLATE - Checklist in Plan Value structure (DAAI-6273) related activities

issuekey	summary	issuetype	created	updated	duedate	assignee	reporter	priority	status	resolution

Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- TEMPLATE - Recurrent task in Delivery - Recurrent creation for status "Delivery" (DAAI-6286) related activities

issuekey	summary	issuetype	created	updated	duedate	assignee	reporter	priority	status	resolution

Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- TEMPLATE - Recurrent task in Closed - Run for status "Done" (DAAI-6358)

issuekey	summary	issuetype	created	updated	duedate	assignee	reporter	priority	status	resolution

Unable to locate Jira server for this macro. It may be due to Application Link configuration.

Creation of views

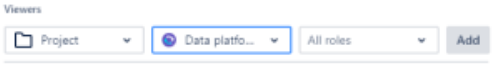
Few views has to be created in order to prepare standard Dashboard.

One view showing all items that are linked to Epics under the project.

To create the filter go to the page and click the button Create Filter.

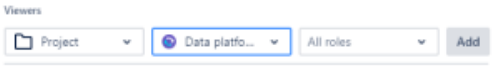
Project filter:

The filter must be configured (linkedIssue in (**LIST OF EPICs**) or issueLink in (**LIST OF EPICs**)) ORDER BY key asc
Name : We can use the project name
Sharing permissions: configure Viewers to "Project" and then "Dta Platform..." like below



Project's Risk filter:

The filter must be configured (linkedIssue in (**LIST OF EPICs**) or issueLink in (**LIST OF EPICs**)) AND type = Risk ORDER BY key asc
Name : We can use the project name + "- Risks"
Sharing permissions: configure Viewers to "Project" and then "Dta Platform..." like below



Project structure example:

Robustify :

- PMO follow-up : ⚠ Unable to locate Jira server for this macro. It may be due to Application Link configuration.
- Project : ⚠ Unable to locate Jira server for this macro. It may be due to Application Link configuration.
- Global overview & statistics: https://solvayagile.atlassian.net/jira/dashboards/10396
  - Backlog with Status
  - Issue Statistics - Epic
  - Issue Statistics - Status
- Atlas : https://team.atlassian.com/project/SOLVA2-16/
  - General Updates?
  - Risks
  - Decisions

Jira Project explanation

- The Jira project used within the data platform is https://solvayagile.atlassian.net/jira/software/c/projects/DAAI/boards/673
  1. **Content**
     The "Data platform - DAAI" is used to follow initiative and project during the end to end phase (from the Intake to maintenance). Activities within different teams of the platform.
  2. **Quick link:**
     a. **Board showing kanban and timeline :**
        i. DAAI Initiative overview: All initiatives that are planned and ongoing with a phase from Backlog to Strategized.
           1. Filter : Only my issue will displays issues which are currently assigned to the current user [assignee = currentUser()]
           2. Filter Not planned will displays all issues which have an empty Start date ["Start date" is EMPTY]
           3. Filter Phase xxxxx will displays all issues currently in the selected phase
        ii. DAAI Project Board : All initiatives that are planned and ongoing with a phase from delivery to Done
           1. Filter: Ongoing project DAAI will displays all issues currently ongoing.
        iii. DAAI All running activities : All activities that are not finished and for which a Start date is known

     b. **A Dashoard**

     containing the main important information is here: https://solvayagile.atlassian.net/jira/dashboards/10366 . It is split in 4 different views.

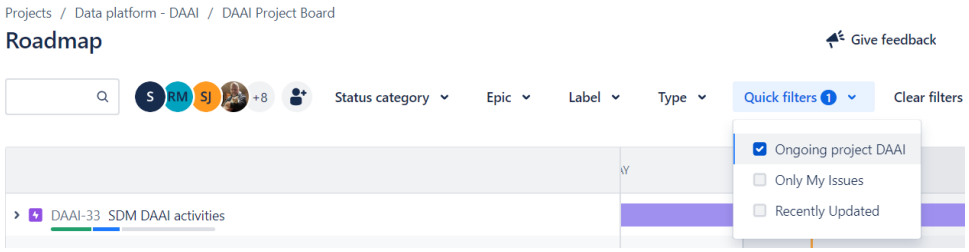
        i. Personal Initiative: This Dashboard can be used by SDM to see project status that are within in his own scope.

ii. DAAI Project Board : All initiatives that are planned and ongoing with a phase from Plan value to Hypercare
iii. DAAI All running activities : All activities that are not finished and for which a Start date is known
iv. Not planned initiative DAAI : All initiatives that are not planned. All project ongoing are part of that board.
v. Ongoing BAU activities DAAI : All activities that are not a project, an initiative

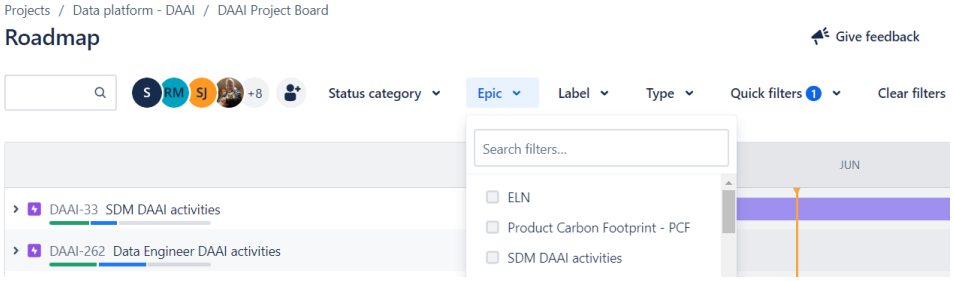
c. **A roadmap :**

which is allowing to have a more detailed and specific view of initiatives : https://solvayagile.atlassian.net/jira/software/c/projects/DAAI/boards/782

i. You can use "Quick filters" in order to see only 'Ongoing project'

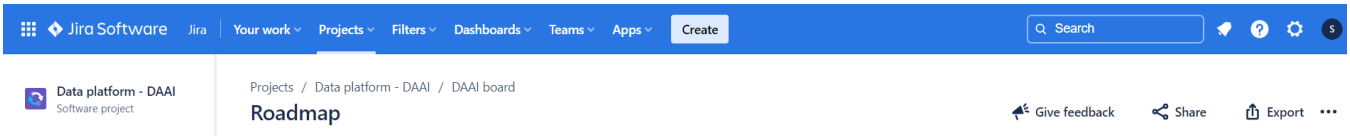


ii. You can also used the filter "Epic" in order to have a specific view on one or multiple define projects.



Creation of a new project:

In order to start a new project, you can click on the button "Create".



1. Create a "Portfolio Epic" type of item.
2. Fill all information that are available and then select the right phase.
    a. PMO activities should be created automatically. If it isn't the case please contact Simon Bourguignon .
3. Create Epic/Feature for all feature that has to be include as part of the potential scope of the project
4. Follow-up on PMO activities to have the project going till the delivery phase
5. The Scrum Master (or someone else) should request a dedicated Jira project.
    a. If it isn't the case you can continue to use the DAAI project

- **Structural solution that is in place**

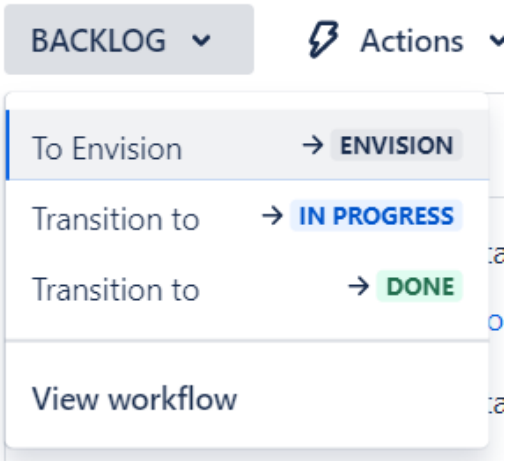
The Structure of a project is created automatically via the automation within the tool.

The structure is creating a set of task and subtask with a define description. This description is including the objective of the task, the responsible people to ensure the task is done and update as well as the Definition of done. This last information is providing the condition required to set the status to "Done".

The file is here : . If a change must be done you can request it via a comment. Modification are limited in order to ensure we do have an alignment between the file and the tool.

Evolution of the Epic status

In order to show the status of the project and ensure it is following the proper workflow you need to click on the Backlog button and select the right status.



A specific workflow is define in order to follow all phases. You need to go through all phases one by one. There are no short path possible but to close the initiative with the status "Done".

Automation

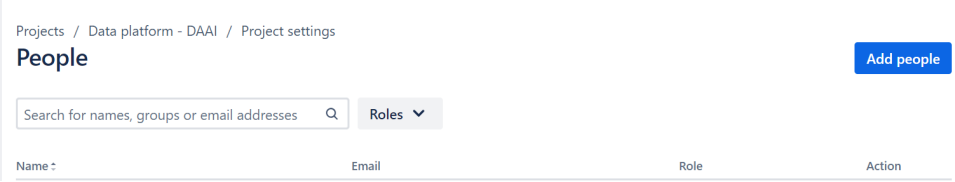
The automation is available here and few documentation are accessible directly on the Jira support documentation.

Access Right

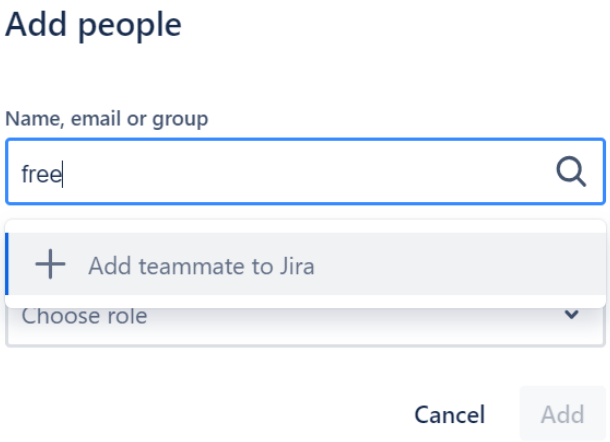
Access to Jira has to be request via the usual process (via ServiceOne) for all new Jira users. When this access is granted it means the user can use Jira but it doesn't means he has access to our project.

In order to have access to the project a request must be done to one Service Delivery Manager. He will apply the below process to grant the access.

- Connect to the People Administration page and will have the below screen above the the list of users.



- Click on the add button and search for the user that must be added. For all users you can select the ***Users*** role available at the end of the list of roles. If the user doesn't have access to Jira (general access) you will see below message (Add teammate to Jira).



- Click on the add button of above screen when both the user and his role has been define.