Helping Agile Teams Increase Collaboration,
Improve Team Performance and Enhance Project Reporting

Dogs Trust Charity

Implementing an Integrated User Acceptance Testing Process with Jira

CASE STUDY

Introduction

We specialise in the implementation of Jira based solutions for agile development teams. Helping companies like yours get more out of tools like Jira. Focusing on the application and implementation of Jira based solutions to help you improve the way your project run. In this case

EXECUTIVE SUMMARY

CHALLENGE: Dogs Trust recognised the inefficiencies and limitations impossed by their traditional Excel based approach to User Acceptance Testing. Lack of visibility. Poor accountability. A high overhead managing Excel spreadsheets. Duplication of data in emails and

This was all about showing end users the absolute basics of Jira so that they felt comfortable running their user acceptance tests in Jira. The critical success factor? Focusing only on what really mattered in Jira for this sub-set of users.

RESULTS: The whole development life-cycle, right through to UAT, tracked in Jira.

study we walk you through how we rolled out a Jira based test management solution to help a major UK based charity manage their User Acceptance Testing.

spreadsheets. No dashboards to track progress. In some cases, difficulties with oversight and poor visibility meant it was easy for users to skip their UAT responsibilities altogether.

Ideally the project team needed all their UAT data in their instance of Jira. The difficulty was getting end users to use a complex tool like Jira.

SOLUTION: Define a simplified UAT process that could be implemented in Jira. A process that could be followed easily by non-technical end users. Starting with the analysis and selection of a test management plugin for Jira and working through to the development of a training course.

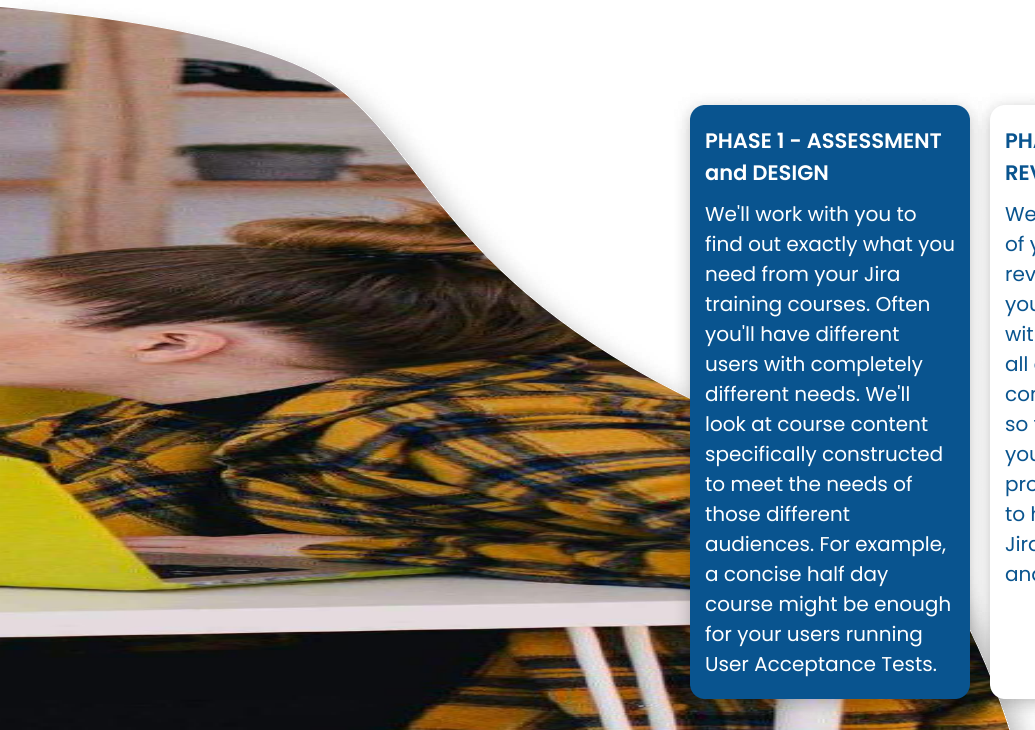
- The ability to assign UAT tests to specific end users
- The capability to track UAT execution progress on Jira dashboards
- Elimination of data duplicated in Excel and Emails
- Traceability of UAT issues back to User Stories
- Clear feedback from the end users to the project team

> *"Thank you, a really nice piece of work here! Lots of very positive feedback from the users and you have been great to work with."*

Fiona Humphries, Dogs Trust Programme Manager

Bespoke Jira and Test Management Training Courses

You've configured your Jira solution specifically for your team. For your processes. For your needs. A one size fits all training solution does NOT cater for your team, your processes or your needs.
If you're looking for both implementation success and user up take then bespoke, custom designed and custom delivered training courses are the solution. Bespoke courses deliver far better results. They deliver just the right amount of information, in the right format and at the right time.



Our Approach

PHASE 1 - ASSESSMENT and DESIGN

We'll work with you to find out exactly what you need from your Jira training courses. Often you'll have different users with completely different needs. We'll look at course content specifically constructed to meet the needs of those different audiences. For example, a concise half day course might be enough for your users running User Acceptance Tests.

PHASE 2 – DRAFT and REVIEW

We'll create the first draft of your courses. We'll review the content with you to make sure it fits with your needs. This is all about orientating the content of your course so that it's specific to your setup and your processes. We're looking to help you implement Jira with consistency and clarity.

PHASE 3 - DELIVERY

Our instructors have perfected their craft with live on-line training sessions from years of practice. This is about engaging and imparting information with the most effective tools and techniques at our disposal today. We use some of the most advanced training platforms. We'll run live online quizzes and we'll provide exercises that really reinforce the way your teams work.

PHASE 4 - REINFORCE and SUPPORT

We'll deliver a package of targeted refresher material specifically developed for your team. Our 'Reinforce' packages are designed to allow you to on-board new users at any time and help cement learning from the live training sessions. Our trainers can be on hand to support and mentor your team as they embark on new ways of working too.

Application in the real world is critical. Which is why we build everything around your processes and your way of working.

Dogs Trust Charity

7 Projects in Flight - 2400 UAT Tests to Run
40 User Acceptance Testers to Train

Dogs Trust is a British animal welfare charity which specialises in the well-being of dogs. It is the largest dog welfare charity in the United Kingdom, caring for over 15,000 animals each year. In the midst of significant ERP and CRM systems upgrades Dogs Trust foresaw the looming headache associated with managing the UAT phase of their concurrently running projects.

In a bid to smooth out and streamline their UAT process they decided they needed their UAT testers to use the same tool (Jira) that everyone one else was using to manage the project. On the one hand the potential benefit of having everything tracked and managed by one system. On the other hand the complexities associated with educating testers completely unfamiliar with tools like Jira. The benefits of using the same tools set were clear to see:

- Better reporting and tracking
- Improved traceability across the whole SDLC
- No managing and tracking multiple Excel files
- Increased levels of collaboration
- Release readiness reports updated real time

Unlocking these benefits came down to two aspects. Firstly, developing and implementing a dedicated UAT workflow in Jira. Secondly training all the UAT testers on how to use Jira. Absolutely critical in this was the development of a training course that focused on just 2 or 3 key aspects of Jira. That's all the UAT testers needed. These testers did not need to become experts in using Jira. They just needed to know and understand those 2 or 3 aspects in depth.

The Challenge

For many teams User Acceptance Testing can been a chaotic process, managed with lots of spreadsheets, all emailed to various corners of the organisation. As a result tracking and reporting on UAT can become a massive administrative overhead. The challenges Dogs Trust were up against included:

1. Getting non-technical users on-board: The users picking up the UAT testing had never seen Jira before. Dogs Trust needed these users to engage with using Jira but needed to isolate them from a lot of the usual Jira complexity.

2. Finding the right Test Management plugin for Jira: with 5 main Jira plugins to cover test management it was critical to find a plugin that was simple for the end users to use. Yet Dogs Trust also needed something that was powerful enough to manage complex allocation and reporting requirements.

3. Generating UAT Status reports: status reporting with multiple Excel spreadsheets is always a significant overhead. Finding a Jira test management solution that delivers reporting for different stake holders was going to be critical to the success of this initiative.

4. Defining the right process and workflow: it's far to easy with Jira to over complicate workflow and status configurations. The more complexity the less likely the end users were going to embrace using Jira.

5. Importing legacy test scripts: Significant test case collateral had accumulated in spreadsheets over the years. This collateral needed to be reused. Yet this collateral was in various different formats. This coupled with the complexities of importing test cases, steps and attachments compounding everything.

What Dogs Trust needed was a solution that was easy enough for the end users to engage with, yet kept all their project management tracking inside of Jira. There was the option to use a separate tool just for UAT. Something simple that was easy to roll out to the end users.

However, one of the key objectives was to give the program manager and the project manager's full visibility of progress inside one tool. Keeping to one tool that would deliver traceability reporting and clarity on how different teams were progressing with their allocated testing.

The Solution

Implement a proven test management solution, integrated within Jira. Then configure the test management component within Jira to keep things as simple as possible. Deliver bespoke training to support the end users. Training that focused on delivering high levels of engagement. With everyone across the SDLC using Jira, create dashboards and reporting that clearly conveyed responsibilities and progress during the UAT phases of their projects.

PHASE 1 - ASSESSMENT and DESIGN
Our engagement started with the Assessment and the design of the courses. It's about assessing the needs of the end users. End users that are going to under take the UAT. Also working out the best process for project teams to create and allocate the user acceptance tests. Then defining the reporting requirements for the projects. With this a small Proof of Concept project demonstrating and validating the proposed approach.

PHASE 2 – DRAFT and REVIEW
Once the Proof of Concept has been completed there's always scope to assess what can be improved. A few tweaks to the overall approach and then the development of two focused training courses. The first course orientated towards the project managers and teams that would be overseeing the UAT. The second course orientated towards the non-technical UAT users.

PHASE 3 – DELIVERY
A mixture of on-site and on-line live training. Coupled with detailed exercises based around the Dogs Trust implementation of Jira. No generic one-size fits all content. One course tailored to the project managers running the UAT. The other course tailored to the users running the testing.

PHASE 4 - SUPPORT
As each project completed the training we entered the support phase. Training is critical in this type of initiative but it's the application of the skills learnt that really counts. Our team were on hand to support the user acceptance testers, making sure that implementation and user engagement was delivering the desired results.

The Results

The whole development life-cycle, right through to UAT, managed and tracked in Jira.

Ability to assign UAT tests to specific end users
Projects teams could easily distribute and assign user acceptance tests to the end users undertaking the user acceptance testing. End users could easily find and execute their allocated acceptance tests.

Capability to track UAT execution progress on Jira dashboards
Using standard Jira dashboards, with additional test management widgets, the project teams could see the progress being made. Then, where necessary, take corrective action to get testing efforts back on track.

Elimination of data duplicated in Excel and Emails
It's so easy, when tracking tests with spreadsheets, for everything to become a chaotic mess in a short period of time. Having everyone use the same centralised test management tool eliminates duplication of data and avoids the ping pong of emails going back and forth.

Traceability of UAT issues back to User Stories
Tests tracked in Jira are linked directly back to User Stories. When a test is completed as part of UAT the project team see the test results directly against the User Story. Visibility of test coverage delivers a level of clarity on your release readiness that you'll never achieve with spreadsheets.

Clear feedback from the end users for the project team
End users entering comments and test results directly into Jira means the project team get direct, collated and clear feedback. No lost emails. No pulling together summaries. Feedback directly linked to User Stories and defects visible from the moment they are encountered.

Ready to enhance your User Acceptance Testing process?

If you're ready to take your User Acceptance Testing to the next level and benefit from:

- Enhanced visibility and traceability across your projects
- Improved collaboration between project managers and user acceptance testers
- Consistent and integrated, end-to-end, project reporting

Then we'd love to help.

All you need to do is contact us at
hello@testmanagement.com

or call us on **+44 208 144 4211**

Then we can organise time for a short, no obligation, 'Review' session.
In this session we'll work together to assess your requirements and identify the benefits you can expect to see. If the potential is there to deliver an improved test management process then we'd be happy to put a road map together for you.

We look forward to talking with you soon.

TestManagement.com