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Plugin Overview

Don't waste time. Use this simple, yet flexible time tracking & user assignment extension to accurately assign individual task time across a range of roles. E.g. Developers, Testers & Designers.

So easy to use and a must have extension for any team.

The **Jira Tracking & Estimation** plugin includes the following functionality:

- Original / Remaining Estimates broken down to roles (e.g. Developers / Designers / Testers etc.)
- Ability to assign multiple users (based on role) for each task
- Workflow enhancements to auto assign tasks to users based on their role assigned for the task
- Ability to create work logs that specify the type of work the time was spent on (e.g. development, code reviews)

The following documentation will outline how to setup a project within JIRA to support role based estimations and tracking.

Highlights

Why only set one user as the assignee when you can have multiple users predefined for each role:

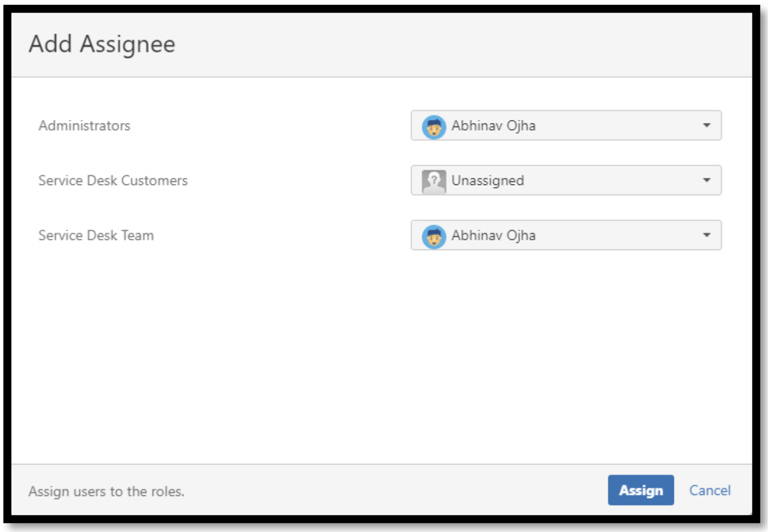


Figure 1: Example of the Add Assignee option on issue view. Each Project Role setup within the Project Configuration will be shown as an option that allows a user to be selected using JIRA's inbuilt user picker.

As the task moves through a work flow the multiple users defined during issue creation can then be referenced for auto re-assignment which is customised by you.

Similarly, you can break down the task Original & Remaining Estimates so that each role can maintain an accurate remaining estimate throughout the issues life cycle:

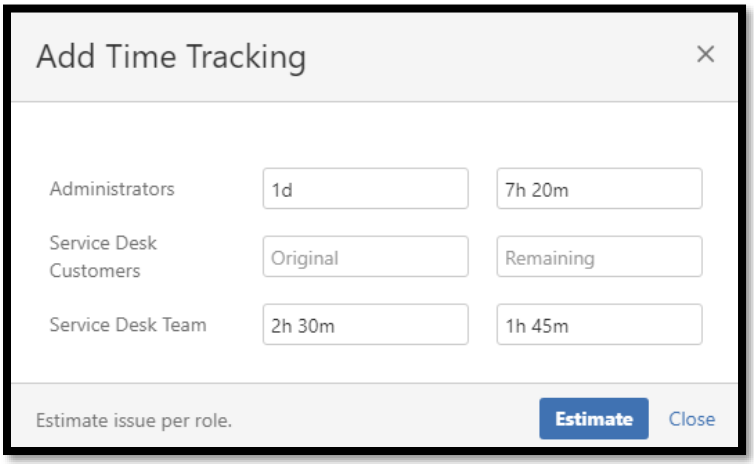


Figure 2: Example of the Add Estimates option on issue view. Each Project Role setup within the Project Configuration will be shown as an option that allows an Original & Remaining estimate to be defined.

This means that as a user logs time they can update their own remaining estimate without having to worry about gathering such information from all the other users working on the same issue in other roles.

The plugin can then provide you with this information instantly via the details pane:

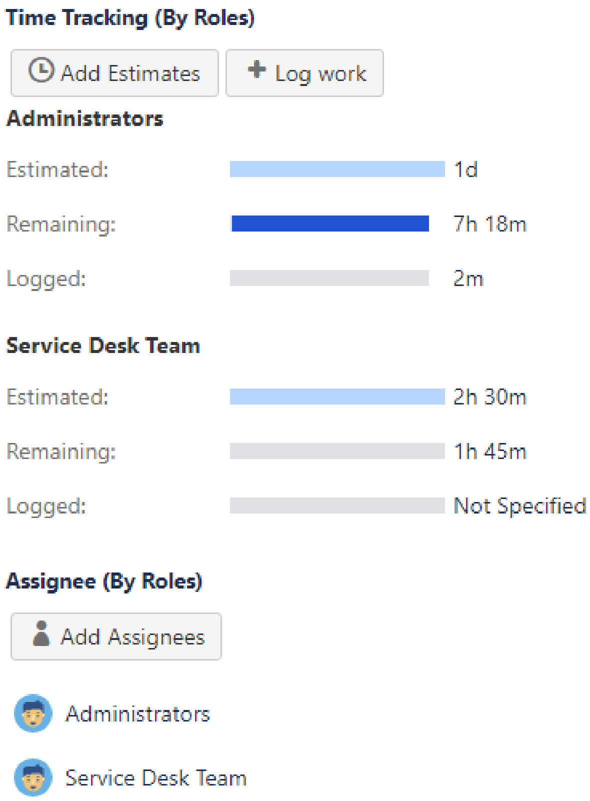


Figure 3: Within the details pane of each issue will be a section detailing each of the users Original / Remaining estimates as well as the time logged under that specific role. Which means that at any time an accurate break down estimates is available with the click of a button.

Configuration

Configuration provide the plugin with a means to determine which Project Roles should be provided to the user when creating, editing & logging time on an issue.

Step 1 – Defining your Project Roles

The plugin foundation is built upon the in-built JIRA Project Roles. These roles are what we assign users to within a project & therefore they become the roles in which we allow users to estimate, be assigned to & log work on.

Project Roles can be created within the JIRA Administration as follows:

a) Login as a user with Administrator permissions to the JIRA installation;
b) Navigate to the Administration & Select the "System" section;
c) Within the System administration there will be a "Roles" menu item listed under "Security". Clicking on this will bring up the Project Role Browser.

From the Project Role Browser you can review & create additional Project Roles that all projects will have access to.

For example in our organisation, we have the following project roles for several of our internal projects:

- Developer
- Designer
- Tester
- Code Reviewer
- Product Owner
- Scrum Master
- Documentation

Step 2 – Using Project Roles in your Project

Now that we have, our project roles defined the next step is to choose which roles should be used by the projects for the role based tracking. To do this we go to each of the projects administration page and the “Time Tracking” section as shown below:

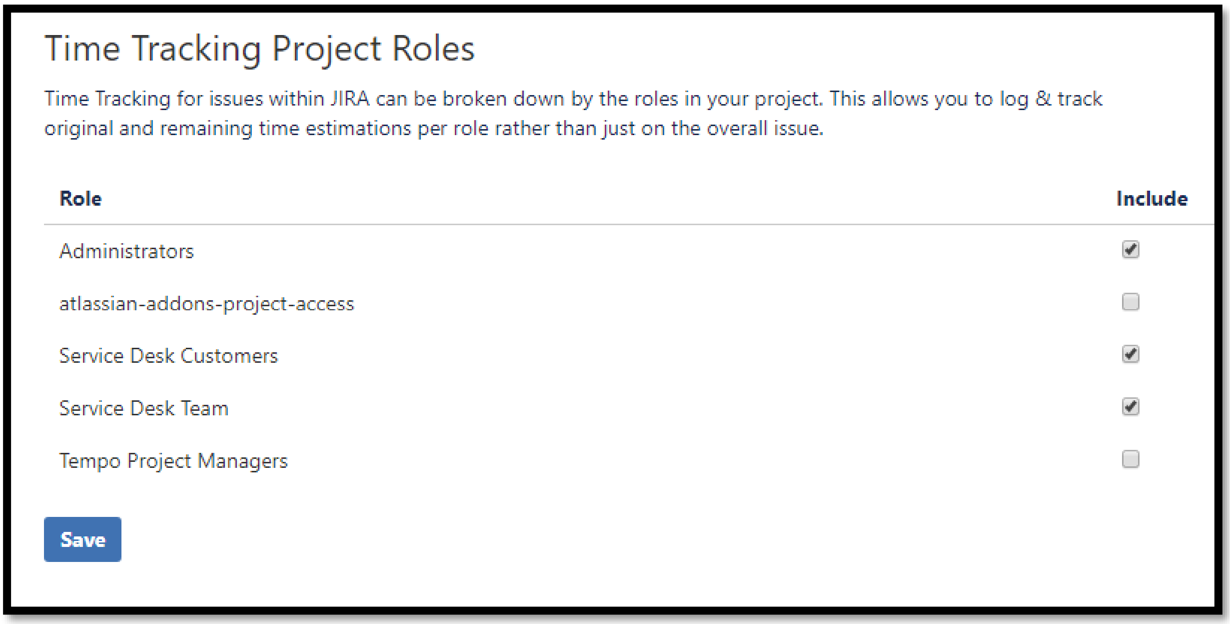


Figure 4: In the Summary view there is a new listing under “Time Tracking” with the option to set up roles for project.

That’s it! After following these steps, you will have the basic idea on how to setup the plugin to allow users assign & estimate per Project Role.

You can now go to the View issue page or the issue details pane on the Agile Boards and you will be presented with option to estimate, assign or log work to the defined roles.

Time Tracking (By Roles) Panel

This issue panel displays the estimation and logged work for each role similar to JIRA's built-in Time Tracking panel.

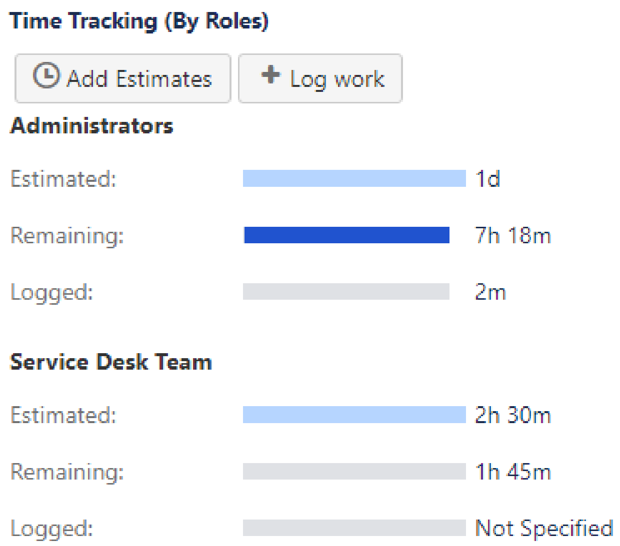


Figure 5: Estimations and logged work per role are displayed in chart format similar to built-in time tracking view along with buttons to add estimates and log work.

It also includes two buttons :

1) **Add Estimates**
   This button opens a dialog to allow you to enter Original & Remaining estimates for each of the roles.

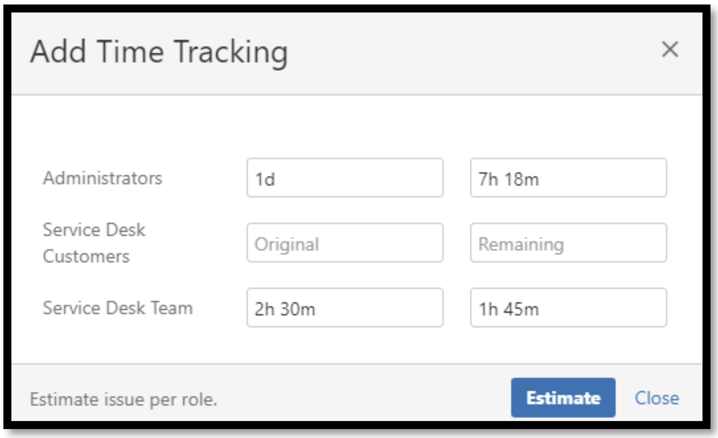


Figure 6: Enter estimates for each role, which will affect the overall estimate of the issue.

This dialog will also warn you when the issue is out of sync, i.e. sum of either or both of the original and remaining estimates for each role do not match with the overall values.

Once you update the estimates from this dialog, overall estimates will be updated to the matching values.

2) Log work

This button opens a dialog smilar to built-in log work modal in addition to a dropdown item "Type of Work" will be displayed to the user & contain all the available Project Role types the user can log time under.

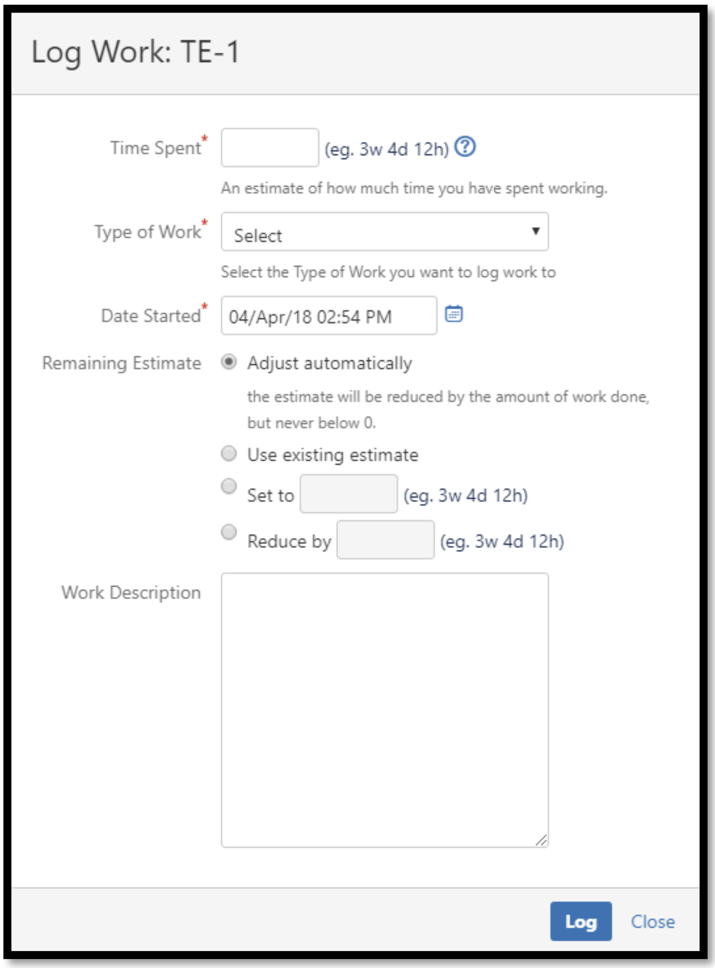


Figure 7: An example of the Log Work modal with the new Type of Work dropdown provided to users when they log time

Note: This is the key to the plugin as if work logs are created without specifying an associated Project Role the issue will revert to non-role specific estimates. This means currently the plugin does not support working alongside 3rd party plugins that create work logs as they.

Assignee (By Roles) Panel

This issue panel displays the users assigned to the roles in the project

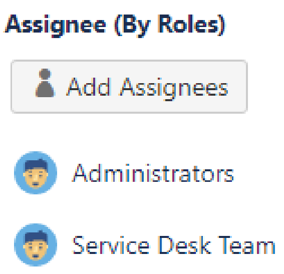


Figure 8: The user avatar is shown against the roles that they are assigned to, with a button to enter the user for the roles.

It also includes a button “Add Estimates”. This button opens a dialog with all the roles set up for the project along with user pickers.

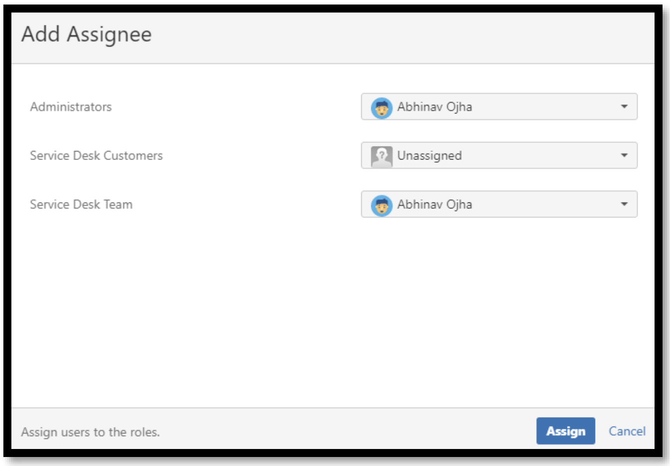


Figure 9: Each Project Role setup within the project will be shown as an option that allows a user to be selected using user picker.

How it works

- The in-built Assignee field should still be used when you want to manually assignee the current user to an issue;
- The user picker will only return users that have permission to be assigned to the issue;
- If you want to automatically re-assign an issue to a user defined to a role, please refer to the Post Functions section of this documentation.

Worklog (By Roles) Tab Panel

This issue tab panel displays the work logs along with the role they are associated to.

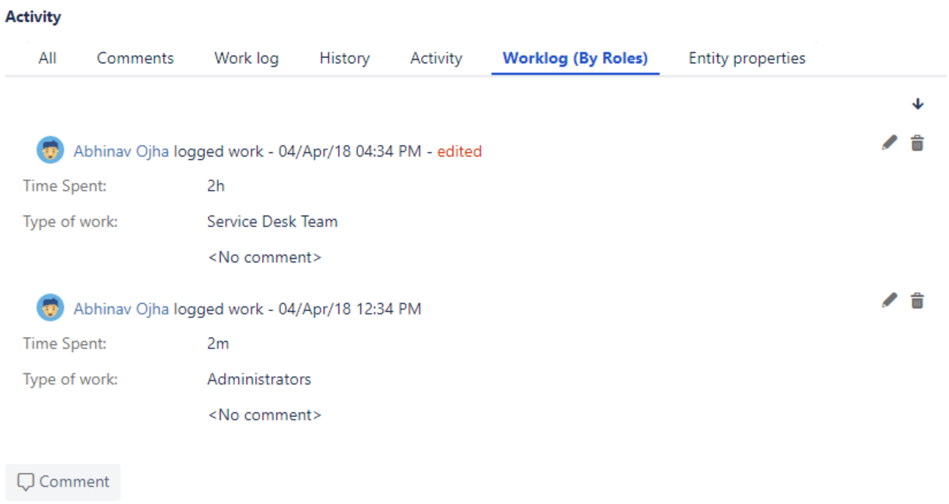


Figure 10: The logged work is shown with the associated role, with edit and delete log work options.

Similar to built-in “Work log” tab panel, this section shows you the logged work with the extra information “Type of work” which is the role selected during log work creation.

You can also edit & delete the worklogs from this section, which will automatically adjust the estimates for the associated roles.

Note: You cannot edit the roles during work log update and delete.

Post Function

The following post function has been created so that a workflow can access data stored via "Assignee (By Roles)" UI.

Assign to Role provided by Role Based Estimations and Tracking

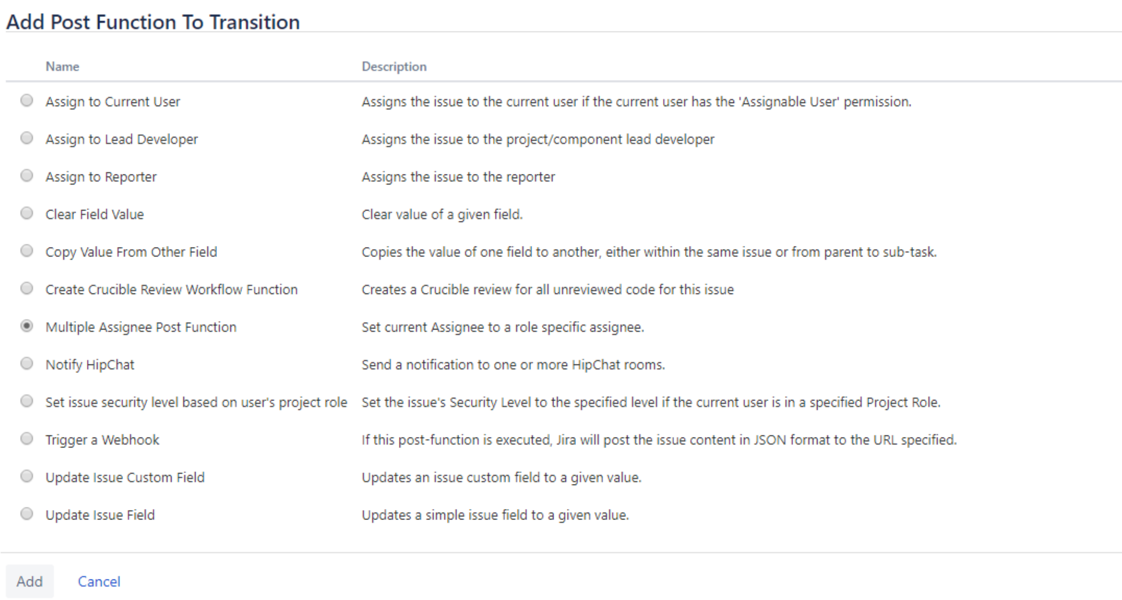
This post function allows you to update the issue's current assignee field to a particular assignee assigned to a specific role.

For example:

As the issue moves from a Developer to a Designer, I want to automatically reassign the issue to the Designer specified in the "Assignees by Role".

How to use this Post Function

1. Edit the workflow that your issue type is currently using;
2. Select the transition where you want to change the current assignee;
3. Select "Post Functions" & then select Add Post functions.
4. From the options available select the post function titled "Multiple Assignee Post Function";


Add Post Function To Transition

Name	Description
Assign to Current User	Assigns the issue to the current user if the current user has the 'Assignable User' permission.
Assign to Lead Developer	Assigns the issue to the project/component lead developer
Assign to Reporter	Assigns the issue to the reporter
Clear Field Value	Clear value of a given field.
Copy Value From Other Field	Copies the value of one field to another, either within the same issue or from parent to sub-task.
Create Crucible Review Workflow Function	Creates a Crucible review for all unreviewed code for this issue
Multiple Assignee Post Function	Set current Assignee to a role specific assignee.
Notify HipChat	Send a notification to one or more HipChat rooms.
Set issue security level based on user's project role	Set the issue's Security Level to the specified level if the current user is in a specified Project Role.
Trigger a Webhook	If this post-function is executed, Jira will post the issue content in JSON format to the URL specified.
Update Issue Custom Field	Updates an issue custom field to a given value.
Update Issue Field	Updates a simple issue field to a given value.

Add Cancel

5. Finally select the Project Role that you want to reassign the issue to. If when the transition occurs there is a user selected for that role the current assignee value will be changed to that user.

Add Parameters To Function

Add required parameters to the Function.

Role: Service Desk Team

Select the role that the user should be sourced from. If the role has no user selected, the current assignee will not be changed.

Add Cancel

Triggers 0 | Conditions 1 | Validators 0 | Post Functions 7

The following will be processed after the transition occurs

1. Current **Assignee** will be changed to the user specified for the **Service Desk Team** role.
2. The **Resolution** of the issue will be set to **Done**.
3. Set issue status to the linked status of the destination workflow step.
4. Add a comment to an issue if one is entered during a transition.
5. Update change history for an issue and store the issue in the database.
6. Re-index an issue to keep indexes in sync with the database.
7. Fire a **Generic Event** event that can be processed by the listeners.

Sprint Workload

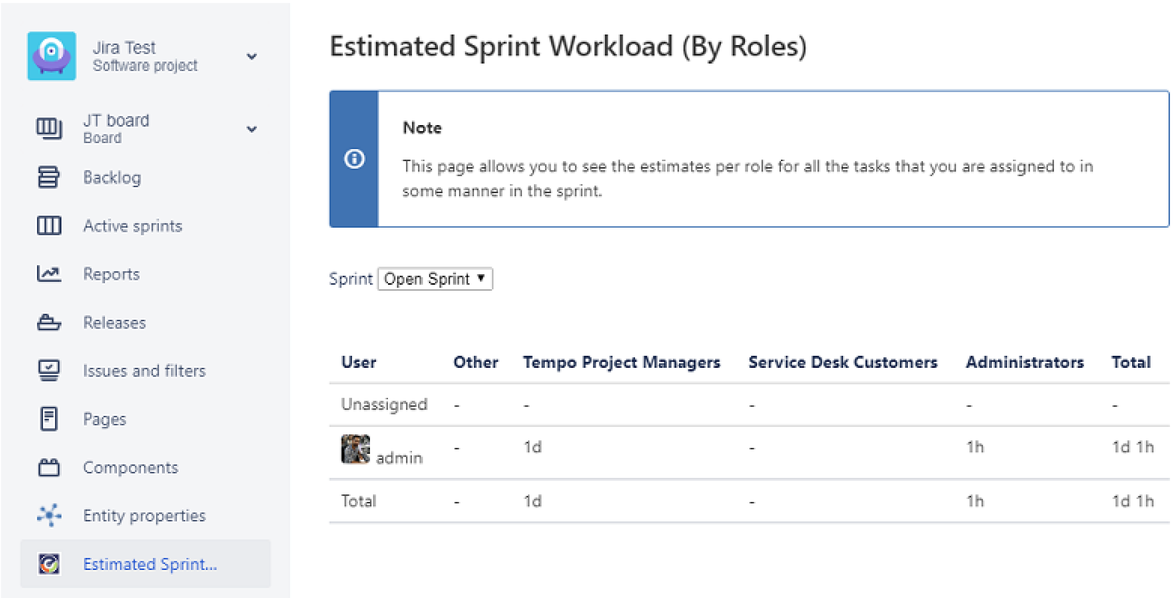
Following project tab panel has been created to let you view workloads per user in a sprint.

ESTIMATED SPRINT WORKLOAD (BY ROLES)

The **Estimated Sprint Workload (By Roles)** project tab panel lets you view a complete workload of the members in the project based on their estimates per role in a sprint.

You can choose any of the sprints from the complete list of all sprints in the project. The workload will be shown in a tabular form with roles as columns and rows as the assigned users.

Note that only those users will be listed who have been assigned to any of the roles from "Assignee (By Roles)" section in the issue. Rest of the role estimates will be calculated and displayed in the "Unassigned" row.



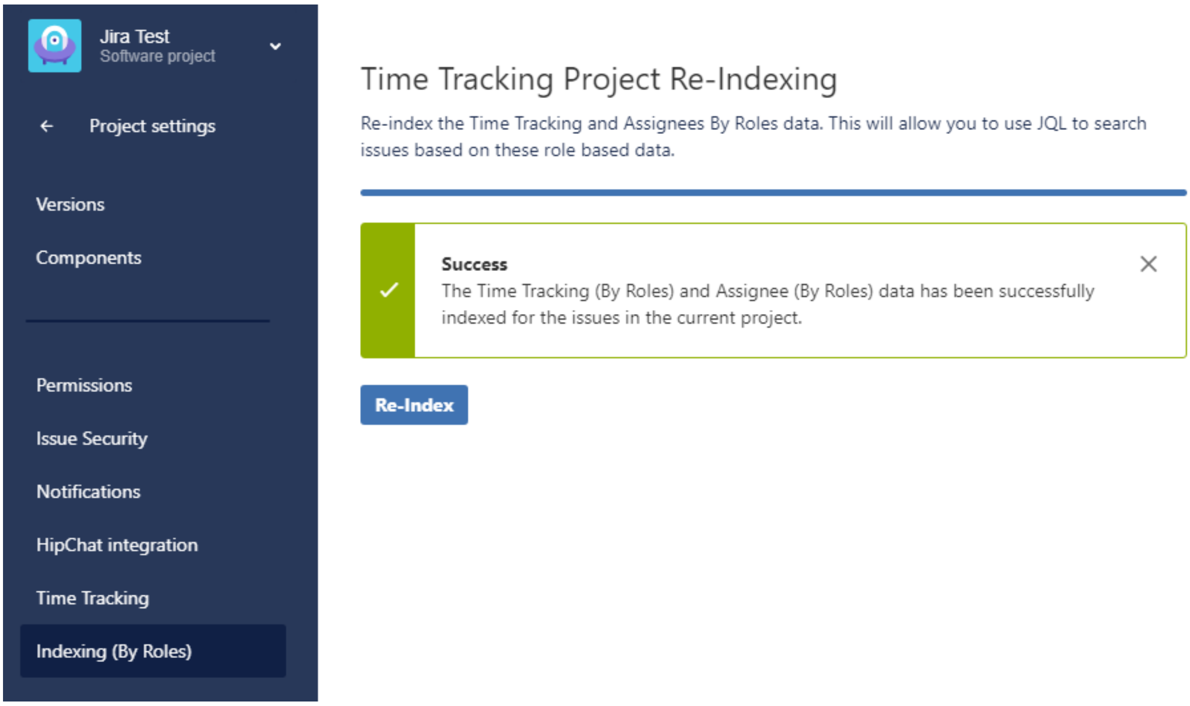
Indexing and Searching

Following project admin page has been created to let you index the role based data for using in searching issues.

Indexing (By Roles)

The **Indexing (By Roles)** project admin page lets you Index role based data entered from "Time Tracking (By Roles)" and "Assignee (By Roles)" section for the entire project, which can be used to search issues by JQL based on these data.

Note that after the first time, you do not always have to Re-Index roles based data, as with the latest update, any new or updated data will be automatically indexed. In case you find any discrepancies in the searches, you can come back here and re-index the project and fix it.



The following two JQL searchers will help you search issues based on role based estimates and assignees.

TIMETRACKINGBYROLES

The **timeTrackingByRoles** JQL searcher takes the role based estimates in the following manner and filters issues based on the data entered via “Time Tracking (By Roles)” section:

1. Original Estimates

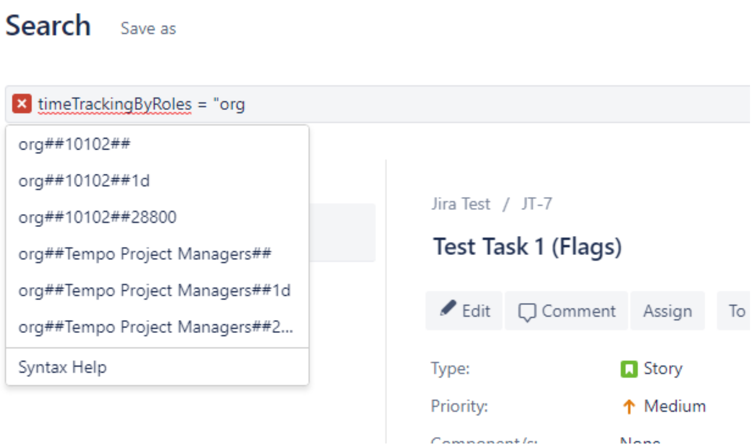
   To search issues based on a specific role’s original estimate, the format will be –

   org##{roleIdOrName}##{timeInSecondsOrStringOrEmpty}

   Here “org” stands for original estimate, “roleIdOrName” can be the id or name of the role you want to search for, and “timeInSecondsOrStringOrEmpty” will be the value of the original estimates you want to search for the role and it can be in seconds, string or left empty.

   Possible values for this will be:

   - "org##Tempo Project Managers##28800"
   - "org##10002##1h "
   - "org##Administrators##1h "
   - "org##10102##"



2. Remaining Estimates

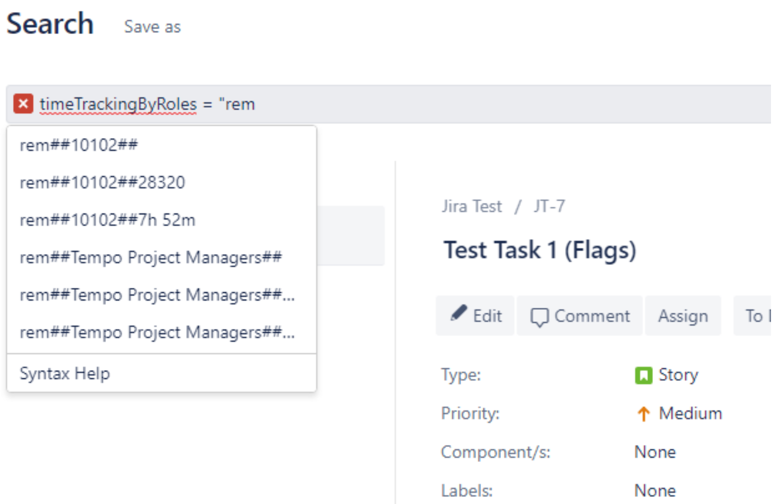
   To search issues based on a specific role’s remaining estimate, the format will be –

   rem##{roleIdOrName}##{timeInSecondsOrStringOrEmpty}

   Here “rem” stands for remaining estimate, “roleIdOrName” can be the id or name of the role you want to search for, and “timeInSecondsOrStringOrEmpty” will be the value of the remaining estimates you want to search for the role and it can be in seconds, string or left empty.

Possible values for this will be:

- "rem##10102##28320"
- "rem##Tempo Project Managers##"
- "rem##10102##7h 52m"
- "rem##10102##"



ASSIGNEEBYROLES

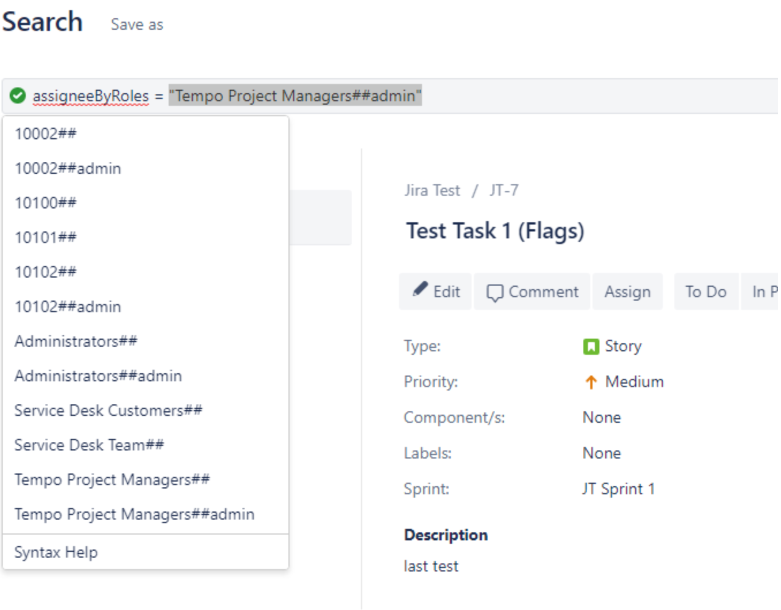
The **assigneeByRoles** JQL searcher takes the role based assignees in the following manner and filters issues based on the data entered via “Assignee (By Roles)” section:

{roleNameOrId}##{userKeyOrEmpty}

Here “roleNameOrId” will be the role name or id against which you want to search a specific user and “userKeyOrEmpty” will be the user key of the assignee, which when left empty, will mean that the issues where no one was assigned to the role will be returned.

Possible values for this will be:

- "10002##admin"
- "10100##"
- "Tempo Project Managers##admin"



Support

If you would like to lodge a support ticket, please use the following portal:

https://adwebsoftware.atlassian.net/servicedesk/customer/portal/3