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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:

| Role | Assignee |
|------------------------|--------------|
| Administrators | Abhinav Ojha |
| Service Desk Customers | Unassigned |
| Service Desk Team | Abhinav Ojha |

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:

| Role | Original Estimate | Remaining Estimate |
|------------------------|-------------------|--------------------|
| Administrators | 1d | 7h 20m |
| Service Desk Customers | Original | Remaining |
| Service Desk Team | 2h 30m | 1h 45m |

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:

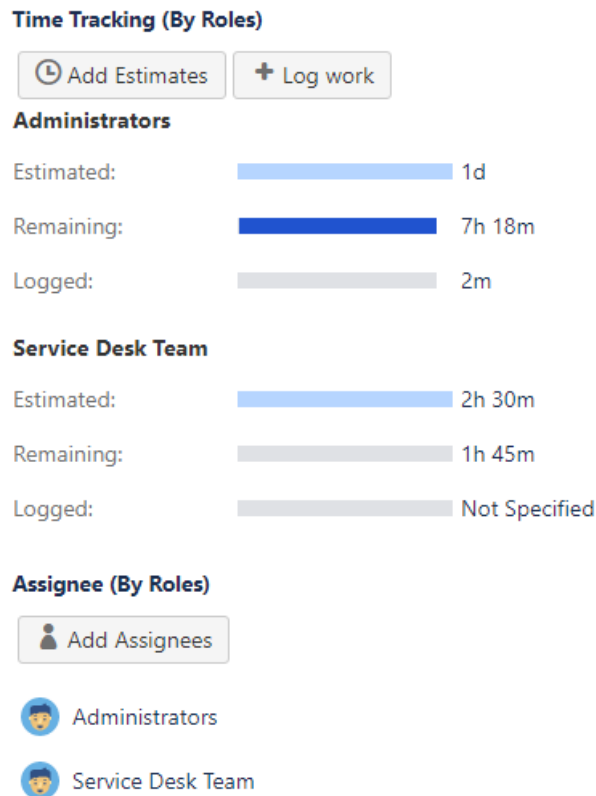


Figure 3: Within the details pane of each issue will be a section detailing each of the users Original / Remaining estimates as well as the time logged under that specific role. Which means that at any time an accurate break down estimates is available with the click of a button.

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.

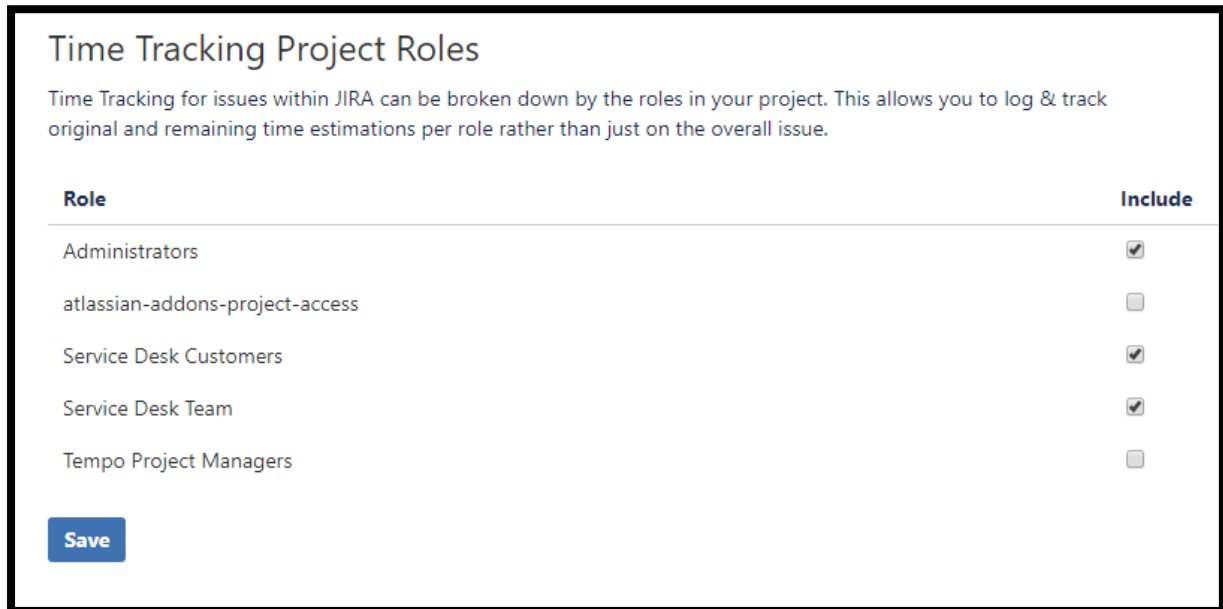
From the Project Role Browser you can review & create additional Project Roles that all projects will have access to.

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:



Time Tracking Project Roles

Time Tracking for issues within JIRA can be broken down by the roles in your project. This allows you to log & track original and remaining time estimations per role rather than just on the overall issue.

| Role | Include |
|---------------------------------|-------------------------------------|
| Administrators | <input checked="" type="checkbox"/> |
| atlassian-addons-project-access | <input type="checkbox"/> |
| Service Desk Customers | <input checked="" type="checkbox"/> |
| Service Desk Team | <input checked="" type="checkbox"/> |
| Tempo Project Managers | <input type="checkbox"/> |

[Save](#)

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.

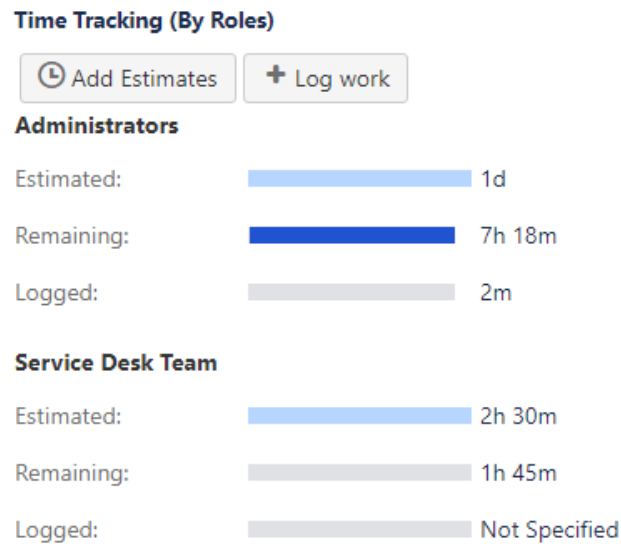


Figure 5: Estimations and logged work per role are displayed in chart format similar to built-in time tracking view along with buttons to add estimates and log work.

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.

The figure shows a dialog box titled 'Add Time Tracking' with a close button (X) in the top right corner. The dialog contains three rows of input fields for different roles. The first row is for 'Administrators' with '1d' in the 'Original' field and '7h 18m' in the 'Remaining' field. The second row is for 'Service Desk Customers' with 'Original' in the 'Original' field and 'Remaining' in the 'Remaining' field. The third row is for 'Service Desk Team' with '2h 30m' in the 'Original' field and '1h 45m' in the 'Remaining' field. At the bottom of the dialog, there is a text label 'Estimate issue per role.' and two buttons: 'Estimate' (highlighted in blue) and 'Close'.

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 similar 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.

The screenshot shows a dialog box titled "Log Work: TE-1". It contains the following fields and options:

- Time Spent***: A text input field with a help icon. Below it is the text: "An estimate of how much time you have spent working."
- Type of Work***: A dropdown menu with "Select" as the current selection. Below it is the text: "Select the Type of Work you want to log work to".
- Date Started***: A date and time picker showing "04/Apr/18 02:54 PM".
- Remaining Estimate**: A section with four radio button options:
 - Adjust automatically: the estimate will be reduced by the amount of work done, but never below 0.
 - Use existing estimate
 - Set to [input] (eg. 3w 4d 12h)
 - Reduce by [input] (eg. 3w 4d 12h)
- Work Description**: A large text area for entering details.
- At the bottom right, there are two buttons: "Log" and "Close".

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

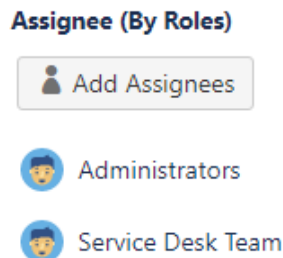


Figure 8: The user avatar is shown against the roles that they are assigned to, with a button to enter the user for the roles.

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.

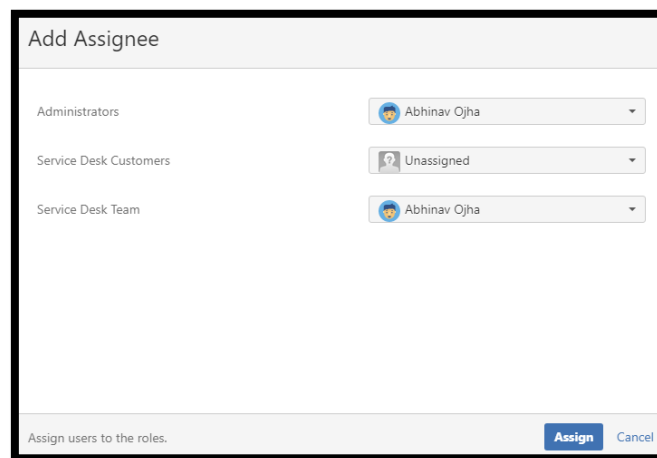


Figure 9: Each Project Role setup within the project will be shown as an option that allows a user to be selected using user picker.

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.

The screenshot shows the 'Worklog (By Roles)' tab panel. At the top, there is a navigation bar with tabs: All, Comments, Work log, History, Activity, **Worklog (By Roles)**, and Entity properties. Below the tabs, there are two work log entries for Abhinav Ojha. The first entry is titled 'Abhinav Ojha logged work - 04/Apr/18 04:34 PM - edited' and shows 'Time Spent: 2h' and 'Type of work: Service Desk Team'. The second entry is titled 'Abhinav Ojha logged work - 04/Apr/18 12:34 PM' and shows 'Time Spent: 2m' and 'Type of work: Administrators'. Both entries have '<No comment>' below them. To the right of each entry are icons for edit and delete. At the bottom left, there is a 'Comment' button.

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

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

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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.

| User | Other | Tempo Project Managers | Service Desk Customers | Administrators | Total |
|------------|-------|------------------------|------------------------|----------------|-------|
| Unassigned | - | - | - | - | - |
| admin | - | 1d | - | 1h | 1d 1h |
| Total | - | 1d | - | 1h | 1d 1h |

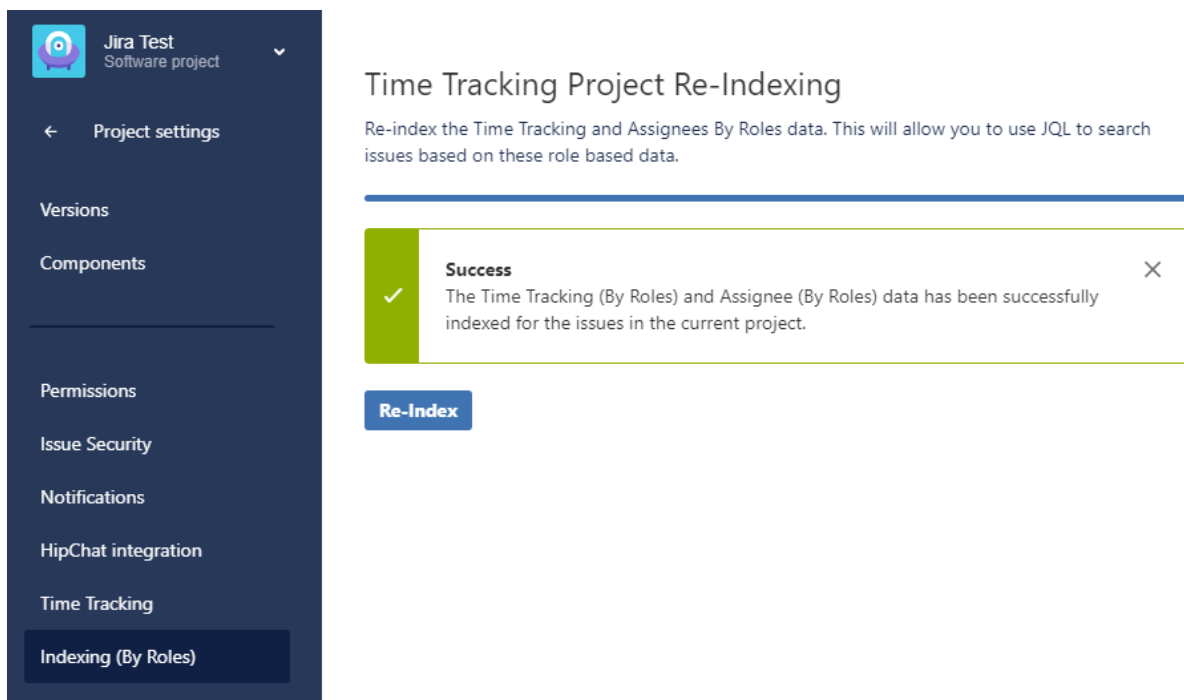
Indexing and Searching

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 screenshot displays the Jira project admin interface for a project named "Jira Test". The left sidebar contains a navigation menu with the following items: "Project settings", "Versions", "Components", "Permissions", "Issue Security", "Notifications", "HipChat integration", "Time Tracking", and "Indexing (By Roles)". The "Indexing (By Roles)" option is highlighted. The main content area is titled "Time Tracking Project Re-Indexing" and includes the instruction: "Re-index the Time Tracking and Assignees By Roles data. This will allow you to use JQL to search issues based on these role based data." Below this instruction is a green success message box that reads: "Success The Time Tracking (By Roles) and Assignee (By Roles) data has been successfully indexed for the issues in the current project." A "Re-Index" button is located below the success message.

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

TIME TRACKING BY ROLES

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

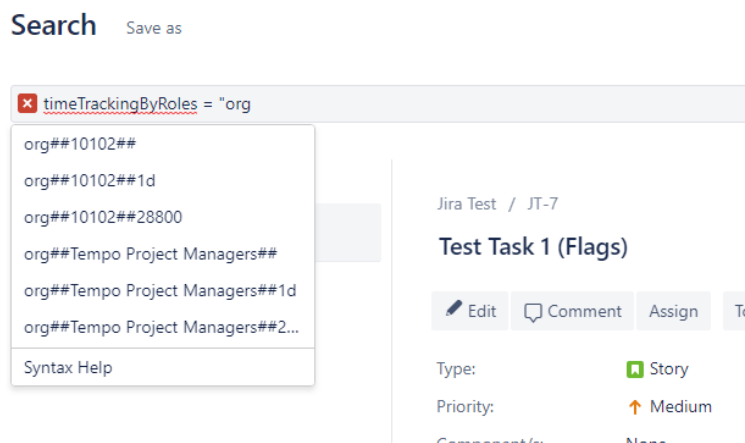
To search issues based on a specific role’s original estimate, the format will be –

`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##"

Search Save as

The screenshot shows a Jira search interface. At the top, there is a search bar with the text "timeTrackingByRoles = "rem". Below the search bar, a dropdown menu is open, displaying several search suggestions: "rem##10102##", "rem##10102##28320", "rem##10102##7h 52m", "rem##Tempo Project Managers##", "rem##Tempo Project Managers##...", "rem##Tempo Project Managers##...", and "Syntax Help". To the right of the search bar, there is a task details panel for "Test Task 1 (Flags)". The panel includes a breadcrumb "Jira Test / JT-7", a title "Test Task 1 (Flags)", and a row of action buttons: "Edit", "Comment", "Assign", and "To". Below the buttons, the task details are listed: "Type: Story", "Priority: Medium", "Component/s: None", and "Labels: None".

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"

The screenshot shows a Jira search interface. At the top, there is a search bar with the text "Search" and a "Save as" link. Below the search bar, a filter is applied: "assigneeByRoles = 'Tempo Project Managers##admin'". A dropdown menu is open, showing a list of possible values for the filter, including "10002##", "10002##admin", "10100##", "10101##", "10102##", "10102##admin", "Administrators##", "Administrators##admin", "Service Desk Customers##", "Service Desk Team##", "Tempo Project Managers##", "Tempo Project Managers##admin", and "Syntax Help".

On the right side of the screen, the details for a specific issue are shown. The issue is titled "Test Task 1 (Flags)" and is located in the "Jira Test / JT-7" project. The issue has several fields: "Type" is "Story", "Priority" is "Medium", "Component/s" is "None", "Labels" is "None", and "Sprint" is "JT Sprint 1". The "Description" field contains the text "last test".

Support

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

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