



Grainger

UAT Feedback Guide



There's always a better way

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UAT Overview



- ❑ To Approve / Sign-Off a Work Item:
 - ❑ Update the “Grainger Testing” field to “Pass”
- ❑ All UAT feedback should be discussed internally
 - ❑ Grainger should triage, consolidate and vet all feedback before logging work items or comments in Jira
- ❑ Work items should be logged as follows:
 - ❑ Bug: Where agreed functionality is not working as per the AC’s on the User Story
 - ❑ User Story: For new features and functionality
 - ❑ All work items need to be assigned to Khonani Davhana (kdavhana@openboxsoftware.com)
 - ❑ All work items to be added to sprint: **CJR Grainger UAT Feedback**
 - ❑ Open Box will review the UAT items and collaborate with Grainger as needed
- ❑ Work items need to include:
 - ❑ Detailed description
 - ❑ Screenshots
 - ❑ Steps to reproduce (for Bugs)
- ❑ For questions or queries relating to User Stories:
 - ❑ Add question / comments to the “Comments” section of that User Story
 - ❑ Tag Khonani Davhana (kdavhana@openboxsoftware.com) to ensure Open Box is notified of the question

Accessing UAT Work Items

openbox

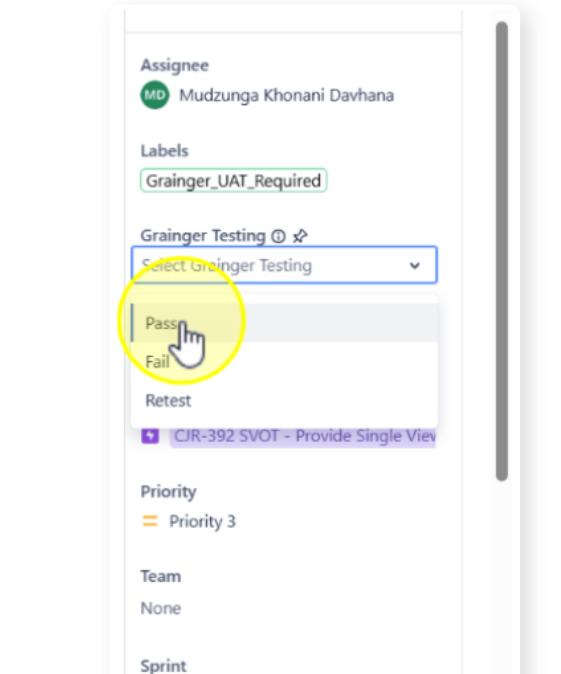
- 1 Access relevant dashboard e.g "SVOT & Tenancy Review" dashboard

The screenshot shows a browser window titled 'SVOT & Tenancy Review - Jira'. The address bar displays the URL: <https://graingerplc.atlassian.net/jira/dashboards/10257>. The page header includes links for 'Import favourites', 'Open Box Intranet ...', 'Activity Feed - Team...', 'My Dashboard', 'Azure DevOps', and 'ABN AMRO Capital'. Below the header, there's a navigation bar with 'Your work', 'Projects', 'Filters', 'Dashboards' (which is currently selected), 'Teams', 'Apps', and a 'Create' button. A dropdown menu titled 'Recent' is open, showing two items: 'SVOT & Tenancy Review' (with a hand cursor icon) and 'SVOT & Tenancy Review - Open Box'. Other options in the dropdown include 'View all dashboards' and 'Create dashboard'. On the left, a sidebar titled 'SVOT & Tenancy Review' lists 'Filter Results: SVOT Epics' with columns for 'T', 'Key', and 'Summary'. Several items are listed, such as 'CJR-393 SVOT - Keep Tenancies Updated &', 'CJR-392 SVOT - Provide Single View of Tenancy', 'CJR-389 SVOT - Create Tenancies in Salesforce that Map to Qube', and 'CJR-345 SVOT - Import Current & Pending Rent from Qube'. The main content area is currently empty.

- 2 Select item to test

The screenshot shows a browser window titled 'Import favourites' with tabs for 'Open Box Intranet ...', 'Activity Feed - Team...', 'My Dashboard', 'Azure DevOps', and 'Dashboard'. The main content area has a header '1-5 of 5' and a timestamp '8 minutes ago'. Below this, a section titled 'Filter Results: SVOT & Tenancy Review UAT (Sprint 2)' is shown. A table lists several work items with columns for 'T', 'Key', and 'Summary'. One item, 'CJR-560 Stop Populating Opportunity ID on Residential Tenancy', is highlighted with a yellow circle and a hand cursor icon. Other items include 'CJR-520 Data Migration - Update PMS Reference on opportunities in progress', 'CJR-518 Data Migration - Migrate Tenancy End Date', 'CJR-517 Data Migration - Exclude Commercial Tenancies', and 'CJR-516 Data Migration - Tenancy Contact Roles'. The right side of the screen shows a 'Grainger Testing' sidebar.

3 Select "Pass" if item passes



Assignee
MD Mudzunga Khonani Davhana

Labels
Grainger_UAT_Required

Grainger Testing ⓘ ✖
Select Grainger Testing

Pass 

Fail

Retest

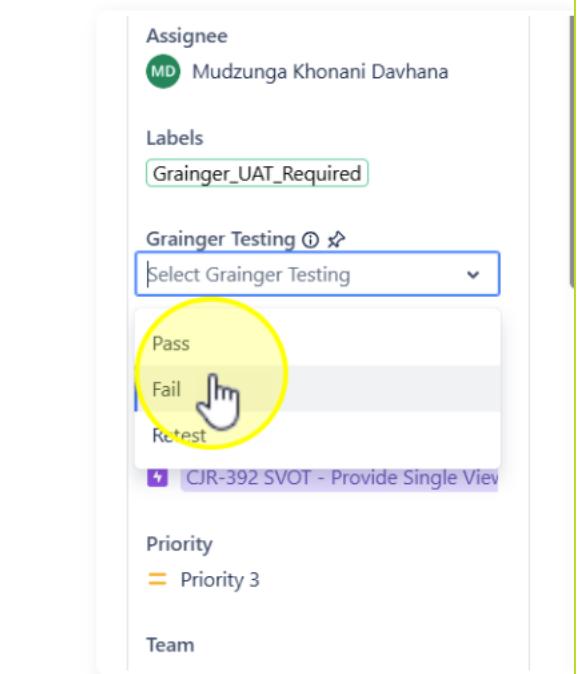
CJR-392 SVOT - Provide Single View

Priority
Priority 3

Team
None

Sprint

4 Select "Fail" if there is a bug



Assignee
MD Mudzunga Khonani Davhana

Labels
Grainger_UAT_Required

Grainger Testing ⓘ ✖
Select Grainger Testing

Pass

Fail 

Retest

CJR-392 SVOT - Provide Single View

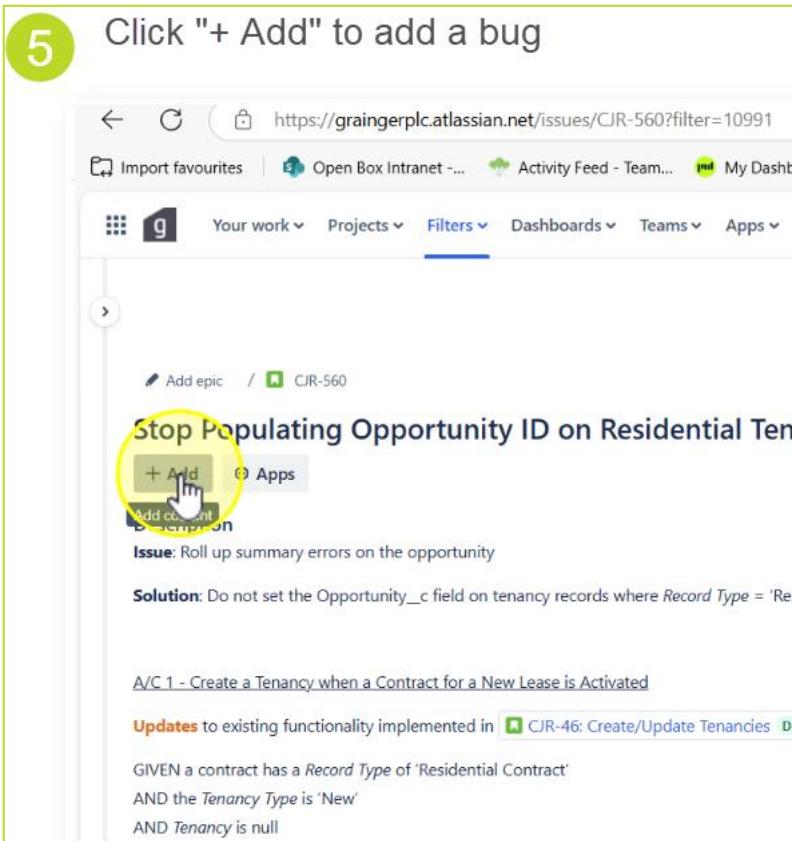
Priority
Priority 3

Team

Logging a Bug



- 5 Click "+ Add" to add a bug



Stop Populating Opportunity ID on Residential Tenancy

+ Add

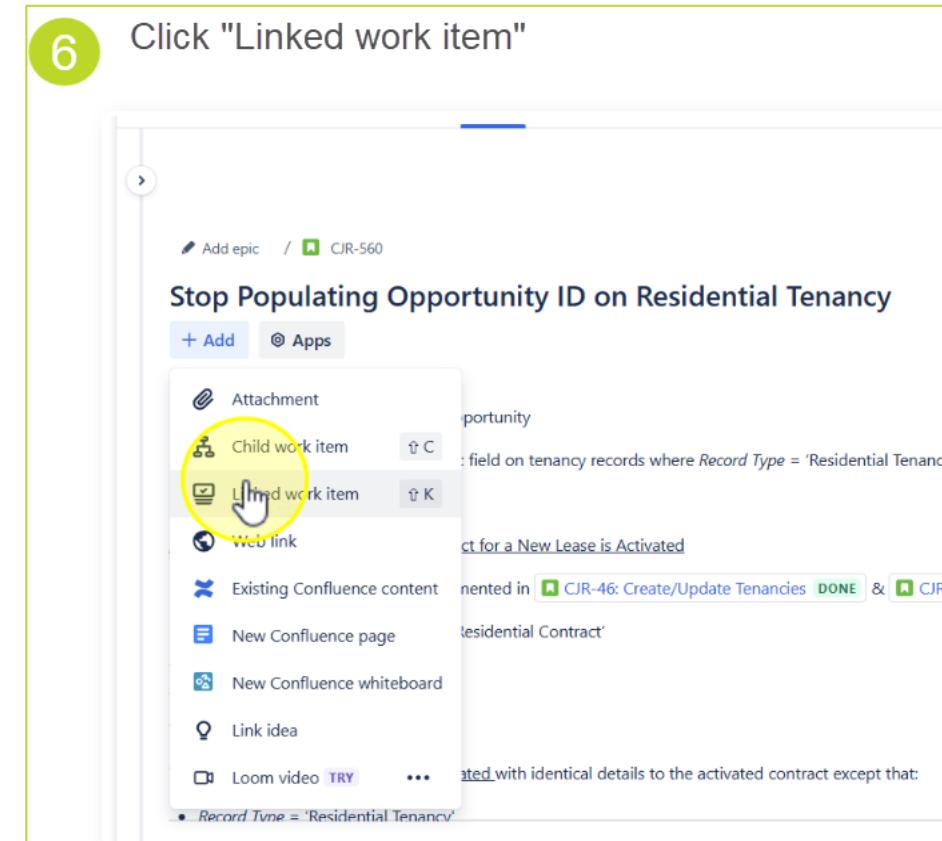
Issue: Roll up summary errors on the opportunity

Solution: Do not set the Opportunity_c field on tenancy records where Record Type = 'Residential Contract'.

A/C 1 - Create a Tenancy when a Contract for a New Lease is Activated

Updates to existing functionality implemented in CJR-46: Create/Update Tenancies DONE

GIVEN a contract has a Record Type of 'Residential Contract'
AND the Tenancy Type is 'New'
AND Tenancy is null
- 6 Click "Linked work item"



Stop Populating Opportunity ID on Residential Tenancy

+ Add Apps

Attachment

Child work item

Linked work item

Web link

Existing Confluence content

New Confluence page

New Confluence whiteboard

Link idea

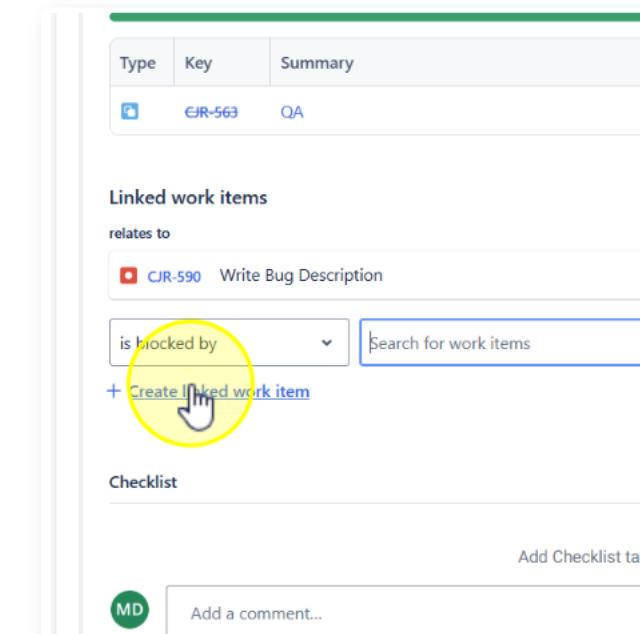
Loom video TRY

...

Record Type = 'Residential Tenancy'

There's always a better way

7 Click "+ Create linked work item"



Type Key Summary

EJR-563 QA

Linked work items

relates to

CJR-590 Write Bug Description

is blocked by

+ Create Linked work item

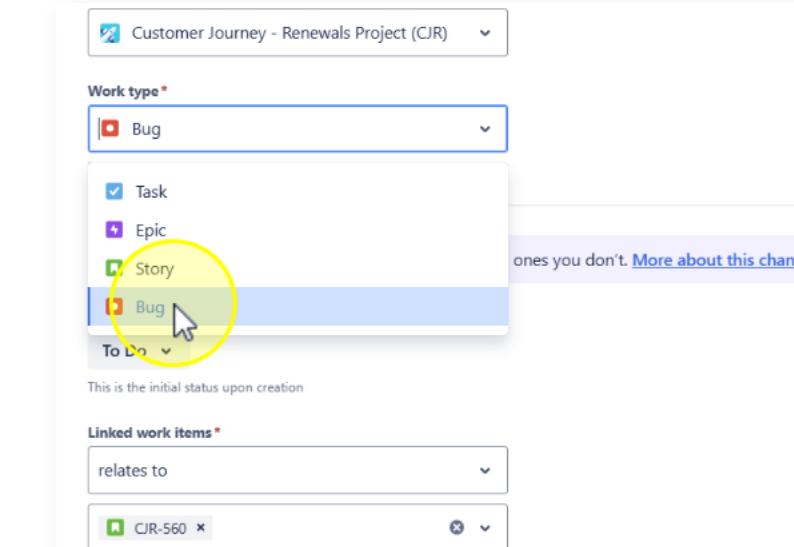
Checklist

Add Checklist tab, li

Add a comment...

8 Select "Bug" work type

Tip: Please create one bug ticket per issue



Customer Journey - Renewals Project (CJR)

Work type *

Bug

Task

Epic

Story

Bug

To Do

This is the initial status upon creation

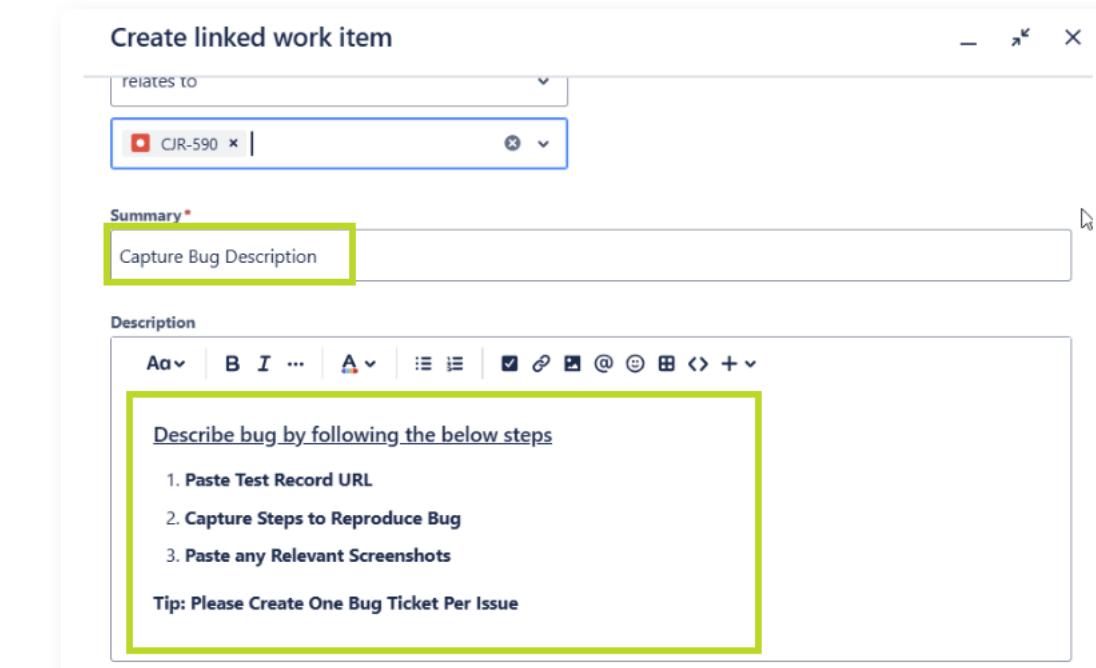
Linked work items *

relates to

CJR-560

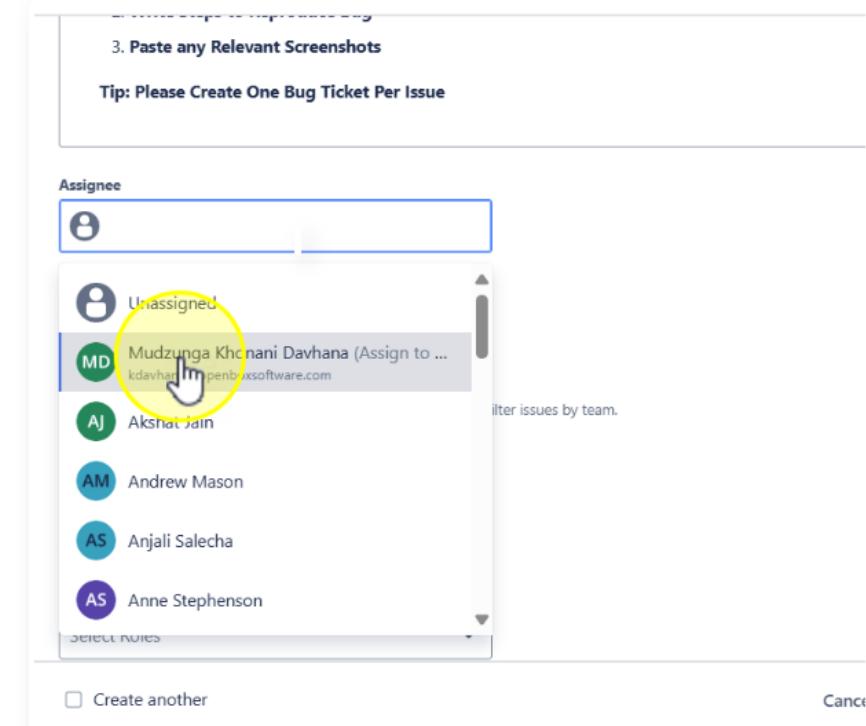
9 Capture bug title and bug description

Tip: Read description from below screenshot on how to describe a bug



The screenshot shows the 'Create linked work item' dialog. In the 'Summary' field, the text 'Capture Bug Description' is entered. In the 'Description' field, there is a box containing instructions: 'Describe bug by following the below steps', '1. Paste Test Record URL', '2. Capture Steps to Reproduce Bug', '3. Paste any Relevant Screenshots', and 'Tip: Please Create One Bug Ticket Per Issue'. The entire 'Description' box is highlighted with a yellow border.

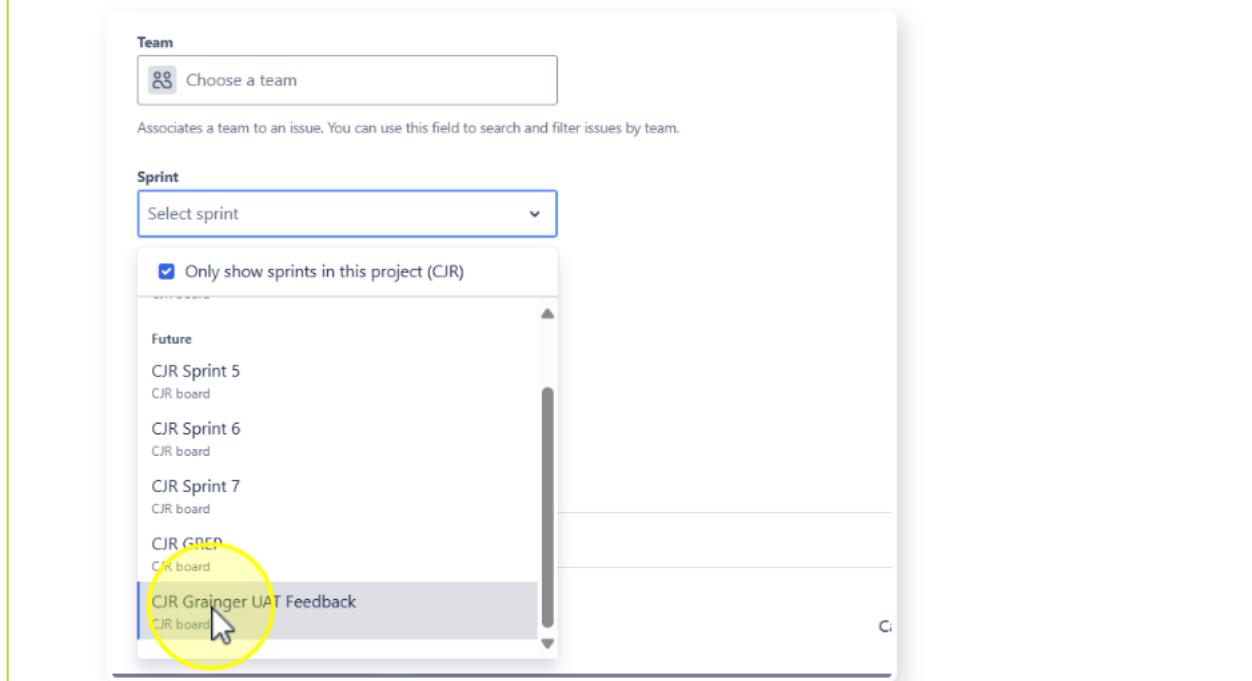
10 Select Open Box UAT stakeholder as "Assignee"



The screenshot shows the 'Assignee' selection dialog. A list of stakeholders is displayed, with 'Mudzunga Khonani Davhana (Assign to ...)' highlighted and circled in yellow. The 'Assignee' field above the list is empty. The 'Tip: Please Create One Bug Ticket Per Issue' message is visible at the top of the dialog.

11

Select Sprint provided for UAT feedback items e.g "CJR Grainger UAT Feedback"



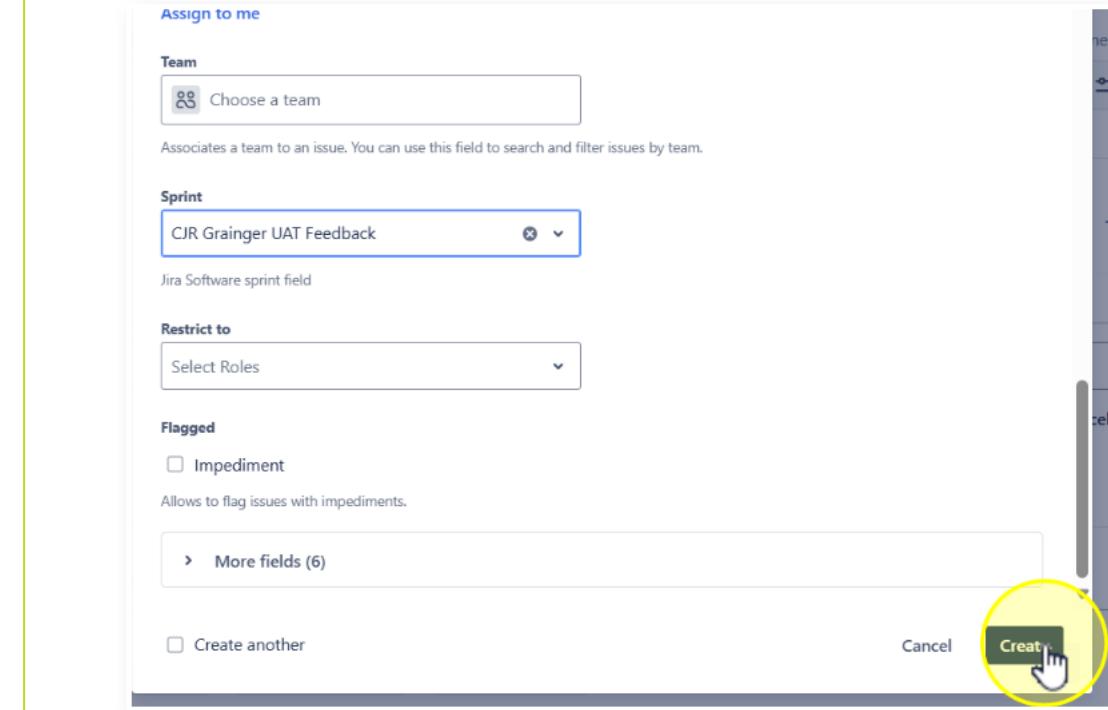
The screenshot shows the 'Team' and 'Sprint' fields. The 'Team' field has a placeholder 'Choose a team'. The 'Sprint' field is expanded, showing a dropdown menu with the following options:

- Select sprint
- Only show sprints in this project (CJR)
- Future
- CJR Sprint 5
CJR board
- CJR Sprint 6
CJR board
- CJR Sprint 7
CJR board
- CJR GREF**
CJR board
- CJR Grainger UAT Feedback**
CJR board

The 'CJR Grainger UAT Feedback' option is highlighted with a yellow circle and a cursor is hovering over it.

12

Click on "Create"



The screenshot shows the 'Assign to me' section of the dialog. The 'Team' field has a placeholder 'Choose a team'. The 'Sprint' field is populated with 'CJR Grainger UAT Feedback'. Below the form, there are sections for 'Restrict to', 'Flagged', and 'More fields (6)'. At the bottom right, there are 'Cancel' and 'Create' buttons, with the 'Create' button being highlighted with a yellow circle and a cursor is hovering over it.

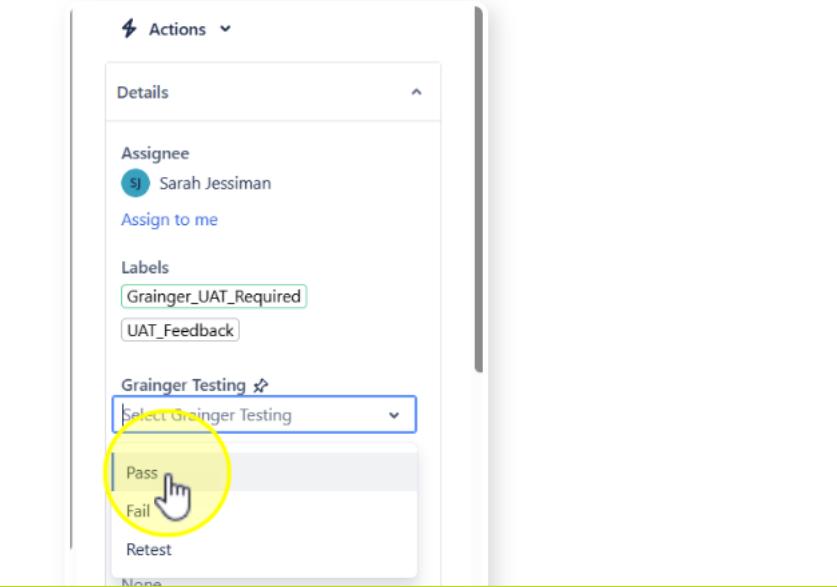
- 13 Bug is created and assigned to Open Box UAT stakeholder

The screenshot shows a Jira issue page for CJR-563. At the top, there's a table with columns: Type, Key, Summary, Priority, and Assignee. CJR-563 is listed with 'QA' assigned and Priority 3. Below this, under 'Linked work items', it says 'is blocked by' and lists CJR-590 'Capture Bug Title'. A yellow circle highlights the link to CJR-590, and a cursor icon is shown pointing at it. The bottom section has a comment input field with placeholder 'Add a comment...' and several status buttons: 'Looks good!', 'Need help?', 'This is blocked...', 'Can you clarify...', and 'This is on track'. A 'Pro tip: press M to comment' is also present.

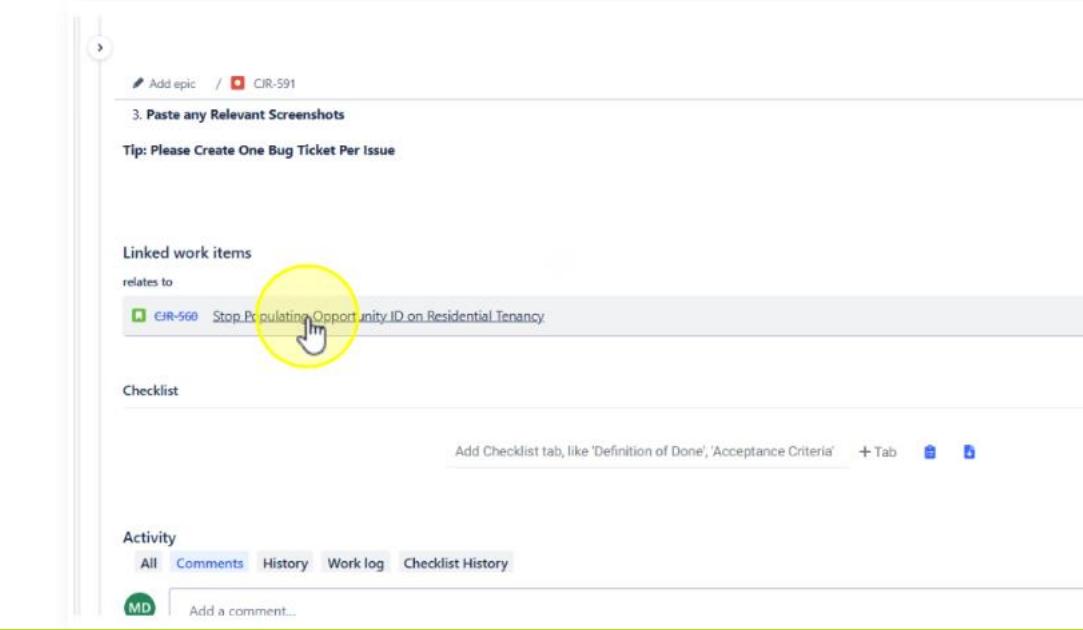
- 14 After bug is fixed and ready for testing it will appear on the UAT dashboard and reassigned to Grainger tester

The screenshot shows a Jira dashboard titled 'SVOT & Tenancy Review - Jira' with the URL https://graingerplc.atlassian.net/jira/dashboards/10257. The dashboard header includes 'Your work', 'Projects', 'Filters', 'Dashboards', 'Teams', 'Apps', and a 'Create' button. Below the header, it says 'Filter Results: SVOT & Tenancy Review UAT (Sprint 2)'. A table lists issues: CJR-590 'Capture Bug Title' (assigned to 'Grainger Testing'), CJR-560 'Stop Populating Opportunity ID on Residential Tenancy' (CJR Sprint 4), CJR-520 'Data Migration - Update PMS Reference on opportunities in progress' (CJR Sprint 4), and CJR-518 'Data Migration - Migrate Tenancy End Date' (CJR Sprint 4). A yellow circle highlights the 'Capture Bug Title' row, and a cursor icon is shown pointing at it.

15 Select "Pass" or "Fail" after re-testing the bug

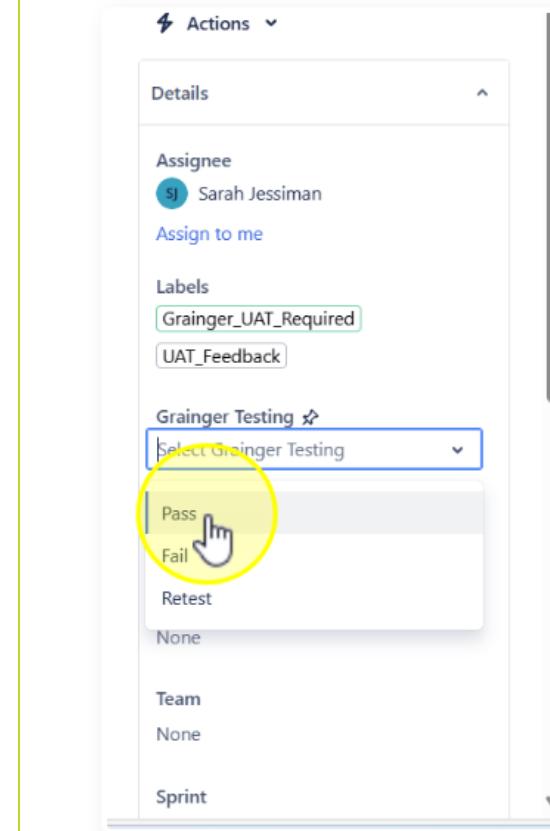


16 Click on the Story related to the bug



17

Select "Pass" if story passes



Raising Comments / Questions



18

Add question / comments to the “Comments” section of that User Story or Bug Tag Open Box UAT stakeholder

The screenshot shows a user interface for managing comments on a specific item. At the top, there's a navigation bar with tabs: All, **Comments**, History, Work log, and Checklist History. Below the navigation, a user profile icon labeled 'MD' is visible next to a text input field containing the placeholder 'Add a comment...'. This input field is highlighted with a green border. Below the input field are five small, rounded rectangular buttons with icons and text: 'Looks good!', 'Need help?', 'This is blocked...', 'Can you clarify...?', and 'This is on track'. The last button has a checked checkbox icon. At the bottom of the comment area, there's a 'Pro tip: press M to comment' message and a cursor icon pointing towards the right edge of the comment box.

Logging a User Story



19 Click "Projects" tab

The screenshot shows a Jira dashboard with the URL <https://graingerplc.atlassian.net/jira/dashboards/10257>. The 'Projects' tab is highlighted with a yellow circle and a cursor icon. The dashboard displays a list of issues under 'Filter Results: SVOT & Tenancy Review UAT (Sprint 2)'.

| T | Key | Summary |
|---|---------|--|
| ■ | CJR-520 | Data Migration - Update PMS Reference on opportunities in progress |
| ■ | CJR-518 | Data Migration - Migrate Tenancy End Date |
| ■ | CJR-517 | Data Migration - Exclude Commercial Tenancies |
| ■ | CJR-516 | Data Migration - Tenancy Contact Roles |
| ■ | CJR-171 | Link Tenancies created to Opportunities & Contracts |
| ■ | CJR-119 | Create a Renewal from a Tenancy |

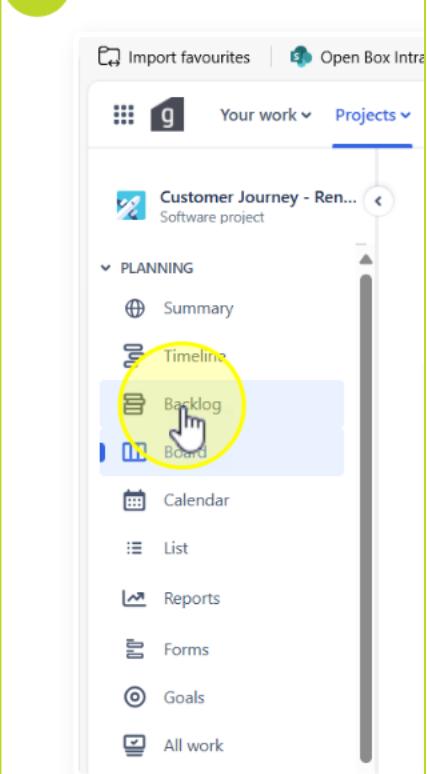
20 Select relevant project e.g "Customer Journey - Renewals Project (CJR)"

The screenshot shows a Jira dashboard with the 'Projects' tab selected. A specific project, 'Customer Journey - Renewals Project (CJR)', is highlighted with a yellow circle and a cursor icon. The dashboard displays a list of issues under 'Filter Results: SVOT & Tenancy Review UAT (Sprint 2)'.

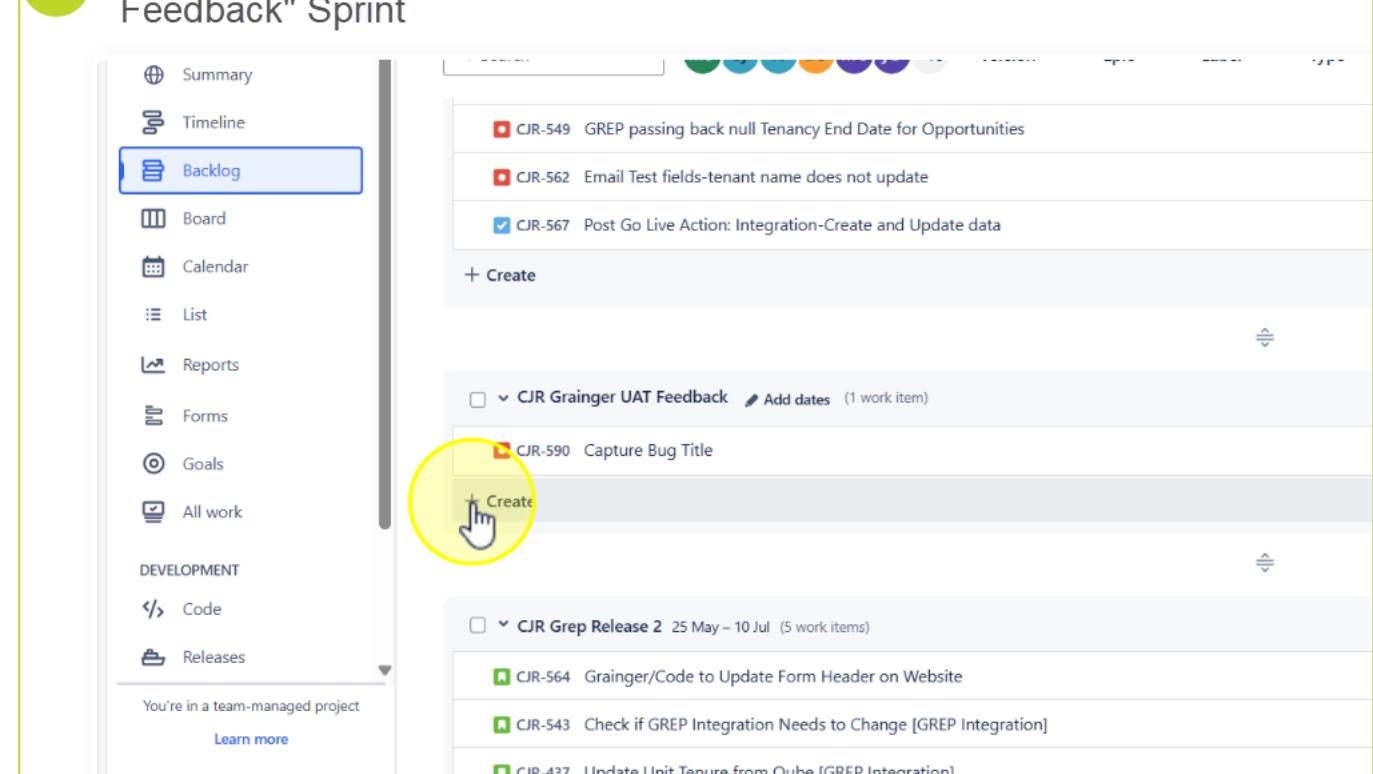
| T | Key | Summary |
|---|---------|--|
| ■ | CJR-520 | Data Migration - Update PMS Reference on opportunities in progress |
| ■ | CJR-518 | Data Migration - Migrate Tenancy End Date |
| ■ | CJR-517 | Data Migration - Exclude Commercial Tenancies |
| ■ | CJR-516 | Data Migration - Tenancy Contact Roles |
| ■ | CJR-171 | Link Tenancies created to Opportunities & Contracts |
| ■ | CJR-119 | Create a Renewal from a Tenancy |

There's always a better way

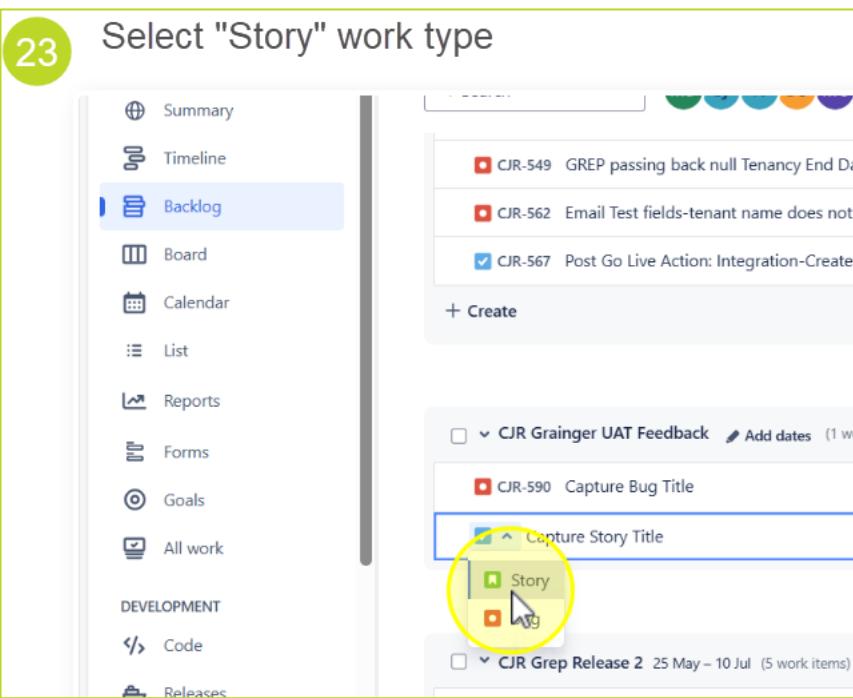
21 Click "Backlog"



22 Click "Create" from provided UAT Feedback Sprint e.g "CJR Grainger UAT Feedback" Sprint

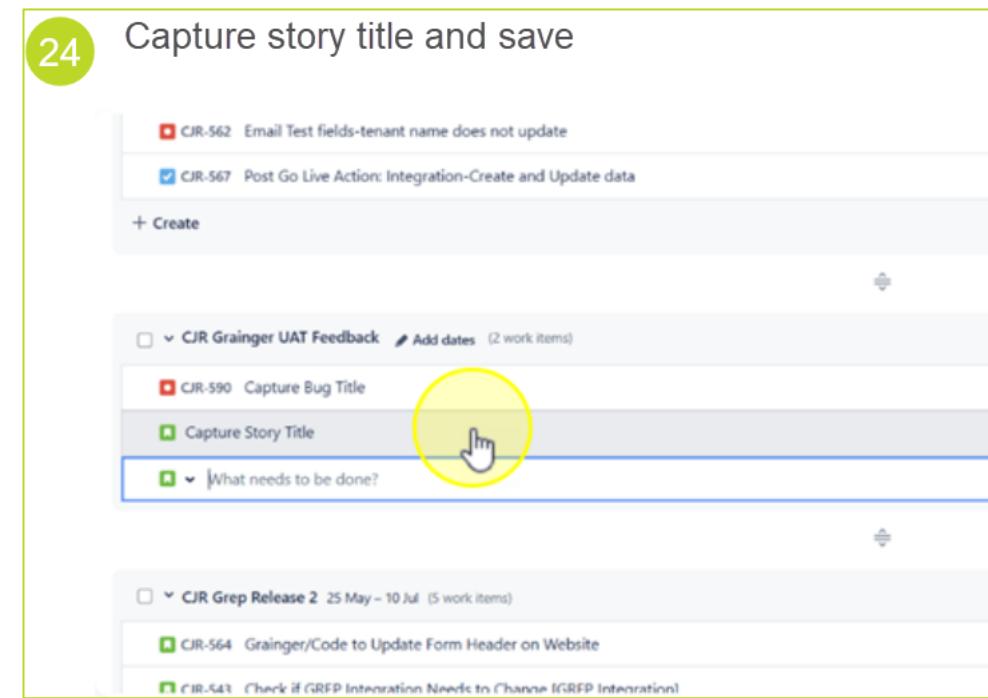


23 Select "Story" work type



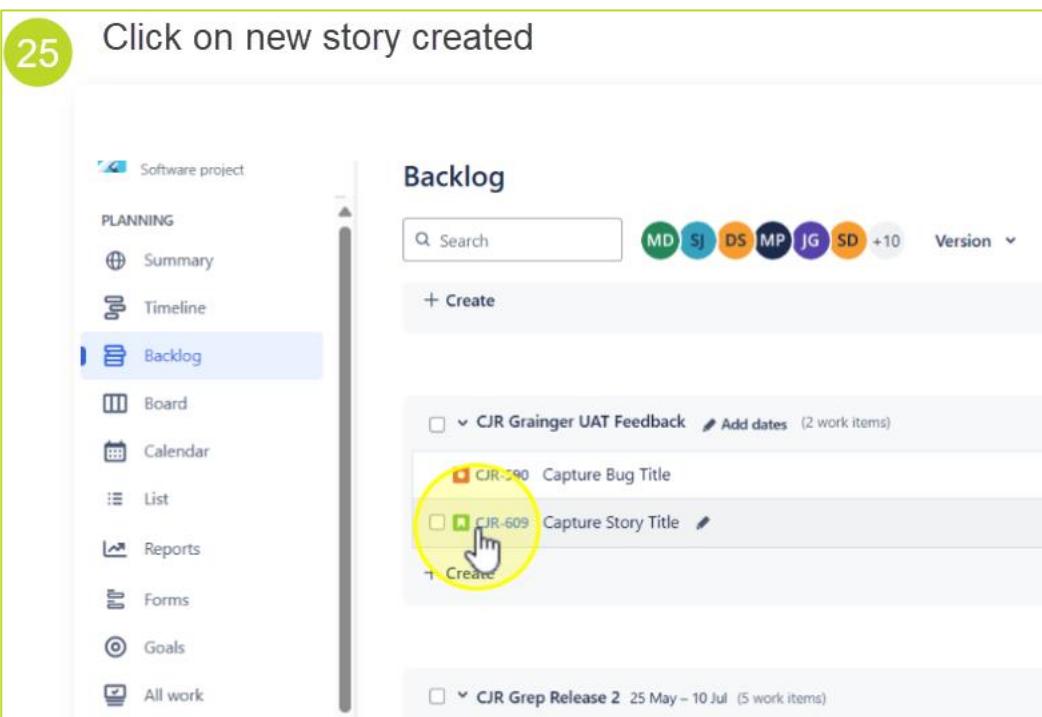
The screenshot shows the 'Backlog' section of the Azure DevOps interface. On the left, a sidebar lists various navigation options: Summary, Timeline, Backlog (which is selected and highlighted in blue), Board, Calendar, List, Reports, Forms, Goals, All work, Development, Code, and Releases. The main area displays a backlog of work items. At the top, there are three cards: 'CJR-549 GREP passing back null Tenancy End Date', 'CJR-562 Email Test fields-tenant name does not update', and 'CJR-567 Post Go Live Action: Integration-Create and Update data'. Below these is a '+ Create' button. Under 'CJR Grainger UAT Feedback', there is a card for 'Capture Bug Title'. Under 'CJR Grep Release 2', there is a card for 'Capture Story Title'. A yellow circle highlights the 'Story' option under the 'Capture Story Title' card, and a cursor arrow points towards it.

24 Capture story title and save



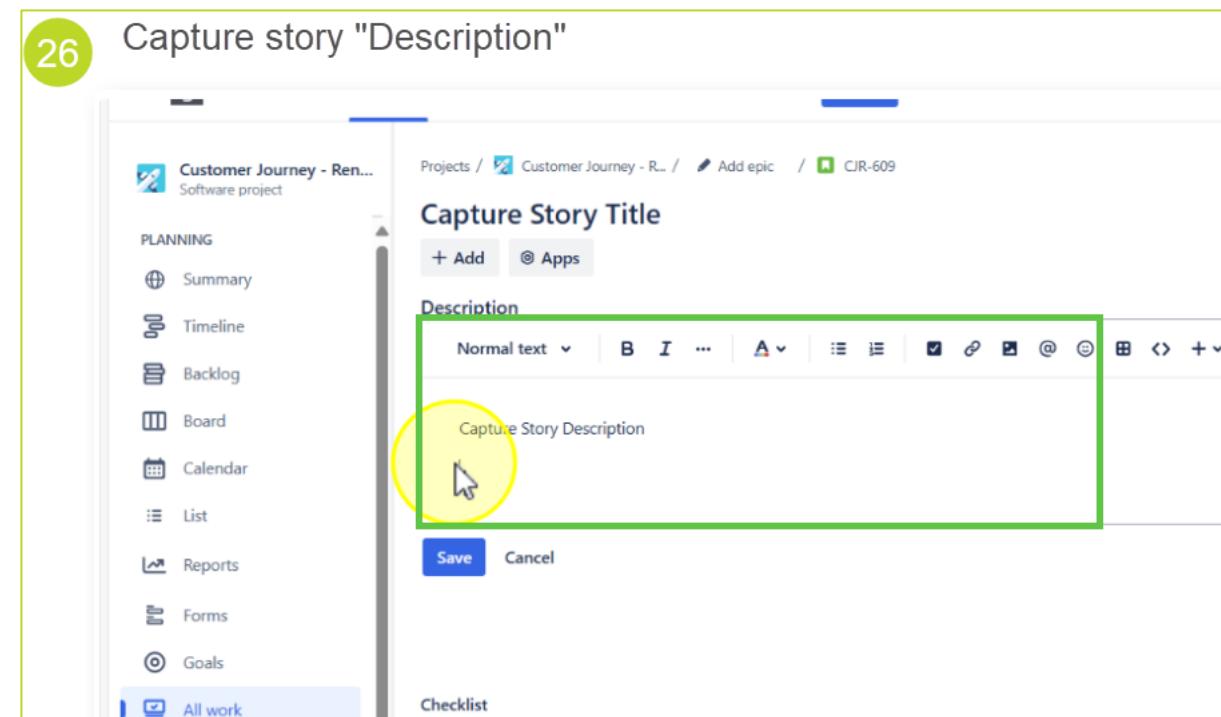
The screenshot shows the same backlog screen as the previous step. The 'Capture Story Title' card under 'CJR Grep Release 2' is now selected, indicated by a blue border around the card. A yellow circle with a hand cursor icon is positioned over the 'Save' button at the bottom right of the card's details panel.

25 Click on new story created



The screenshot shows the Microsoft Project interface with the 'Backlog' tab selected. A search bar at the top has 'Search' placeholder text. Below it, there are status indicators (MD, SJ, DS, MP, JG, SD) and a '+10' button. A '+ Create' button is present. Under the backlog, there is a section for 'CJR Grainger UAT Feedback' with a 'Capture Bug Title' item. Below this, a new item 'Capture Story Title' is listed, which has been circled in yellow and has a hand cursor icon pointing at it. At the bottom, there is another section for 'CJR Grep Release 2'.

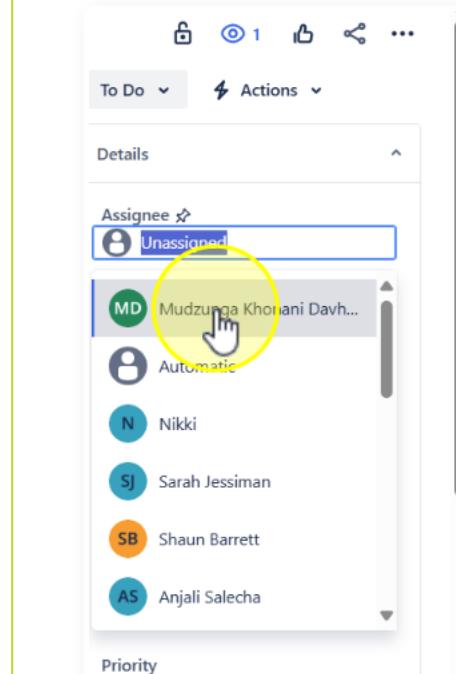
26 Capture story "Description"



The screenshot shows the 'Capture Story Title' dialog box. The 'Description' field is highlighted with a green border and a yellow circle containing a hand cursor icon. The dialog includes a toolbar with text styling options (B, I, etc.) and a 'Save' button at the bottom. The background shows the project navigation bar and the 'All work' tab.

27

Select Open Box UAT stakeholder as "Assignee"



There's always a better way



Thank You

