

Use Case and Functional Specification Doc Review Workflow Overview



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⚠️ **"This document has been archived, please refer to the newer version [Doc Review Workflow Overview](#)" .**

Purpose

This wiki describes the document review workflow for solution use case, use case and functional specification implemented in R&D.

Workflow Overview

The process starts with a Jira issue type and involves some of its fields. Let's review them.

Note: issue type along this document refers to any of *Value Stream* or *Epic*.


Issue Type Related Fields for Doc Review

These are the fields related to the doc review. All fields are located in the Issue Type's *Details* section

- **Use Case Status:** this is the status of the UC doc review. The pick list has four values
 - Not Required: this value is selected when a document is not required for this epic. If this value is selected, the user is required to fill the field Use Case Info with a reason why a document is not required for this epic.

- **Draft:** this value is automatically selected by the system when there is a UC document associated to the epic (the location of which was entered in Use Case Info field).
- **In Review:** this value is automatically selected by the system when there is a UC document associated to the epic and there is at least one area responsible appointed in the epic.
- **Approved:** this value is automatically selected by the system when all areas appointed responsible have approved the document.
- **Use Case Info:** this field has this double purpose:
 - Holding the reason why a document wouldn't be required for this epic
 - Holding the wiki link to the UC document which is associated to this epic
- **Solution Use Case/Functional Spec Status:** Same as UC but for SUC and FS
- **Solution Use Case/Functional Spec Info:** Same as UC but for SUC and FS
- **Following fields are picked up to be the minimum set of reviewers for the documents.**
 - **Customer Service Responsible:** this is the Customer Service appointed responsible to review the UC/FS document
 - **PLL Responsible:** this is the PLL appointed responsible to review the UC/FS/SUC document
 - **Engineering Responsible:** this is the development engineer(s) appointed responsible to review the UC/FS/SUC document. Multiple people can be added
 - **System Test Responsible:** this is the system test engineer(s) appointed responsible to review the UC/FS/SUC document. Multiple people can be added


Status field values enforcement

 Out of the *Status* field four possible values (Not Required, Draft, In Review, Approved) the user can only select *Not Required* and *Draft*

For the remainder values, the user can still select them, but the system will

- Revert them back to the previous value and an epic comment of the reason for reversal.
- Revert also happens when the user selects *Draft* but the current state at the time is different from *Not Required*

This is an example of the comment posted by the system when a user tries to select a value reserved for the system

 Cloud Admin 31 seconds ago
 Use Case status value was reset. This could be either because Use Case Info is empty, its <https://calixdev.atlassian.net/wiki/spaces/TEST/pages/833847297/P46> url is invalid or the user picked a value reserved for the system

In the case that the *Status* field selected value were originally set to *Not Required* but later on it was decided that a document was actually required, the user can still associate a document to the epic by selecting the value *Draft* in the *Status* field and entering a link to the document in the *Info* field.

Reviewers Assignment

To appoint somebody as a reviewer, simply enter the user name in the appropriate responsible field in the Jira issue type. The appointed user will receive an email with the action to review the document. The email includes a review deadline, which is the target date for the issue type fix version as entered in the Release Milestone Jira project for that release (for that fix version). If the issue type's fix version field doesn't contain any value, the deadline is defaulted to two weeks, counting from when the user was appointed for the review.

This is an example of the email sent

```
1 Fom: <Use Case Solution/Use Case/Functional Specification> Document Workflow Admin<noreply@calix.com>
2 Subject: <Use Case Solution/Use Case/Functional Specification> Review assigned
3 Body:
4 You have been assigned as a required Reviewer for <Use Case Solution/Use Case/Functional Specification> document
5
```

```

6      <Issue>: <link_to_issue> - <issue_summary>
7      Your Role: <role>
8      FixVersion: <fixVersion>
9      Document: <link_to_wiki>
10
11     This review needs to be completed and approved for the <Issue> to move into a <Committed|In Progress> status.
12     Deadline to complete this review: <date_calculated_as_explained>
13
14     Please Note: This email has been auto-generated by the Document Workflow Admin. If you have any questions, please

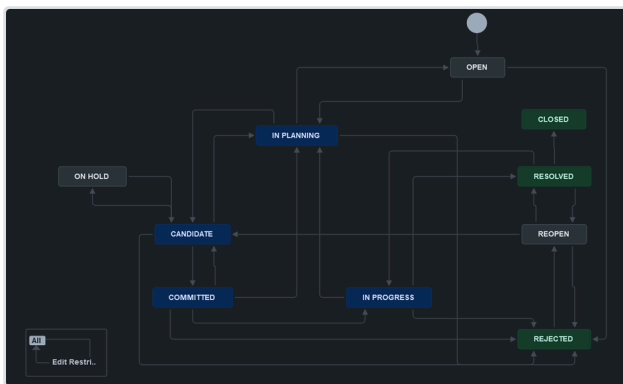
```

i Additionally, the appointed reviewer will be set as a watcher to the issue type so this person will be notified of all the changes done in the Jira issue

Reviewers can be changed/added/removed at any time and those changes will be propagated to the document review panel if the issue type has a [wiki associated](#). In the case of epics, if the epic has a Functional Spec associated and the FS is approved, no more modifications in the responsible fields are allowed (modifications in the responsible fields will be reverted back and a comment will be posted in the epic with the reason why)

Transitions and Transition Conditions

The following is the state workflow allowed for an epic

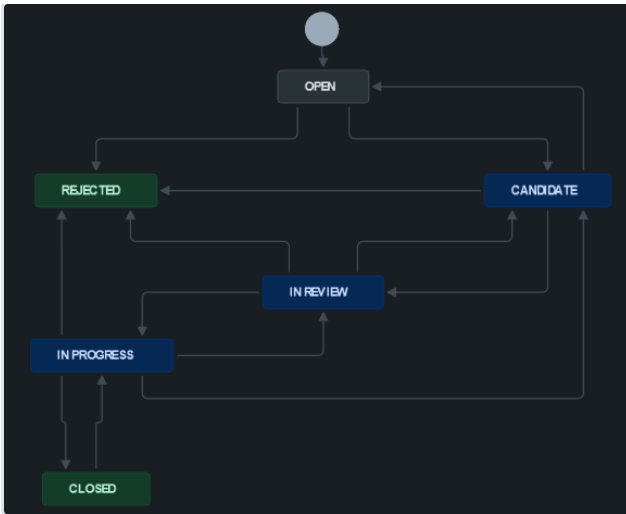


From the document review perspective, and epic can progress all the way to *Candidate*, where it's stopped until a UC document link is entered in the Use Case Info field and the document has been reviewed and approved by all the appointed reviewers.

Once these two conditions are fulfilled, the epic can move forward until *In Progress*, where it's again stopped until a Functional Spec document link is entered in the Functional Spec Info field and the document has been reviewed and approved by all the appointed reviewers. These conditions are not in force if the UC/FS Status field is set to *Not Required*

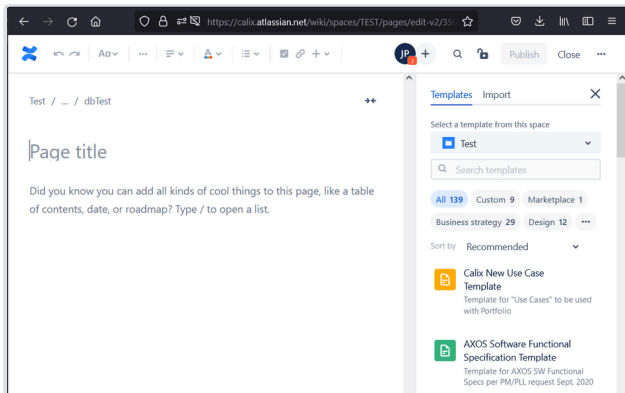
There is a third transition condition in place, this is explained in [Epics family and transition restrictions](#)

The following is the state workflow allowed for a value stream



Document Templates and Reviewers Sections

To create a Solution Use Case/Use Case/Functional Spec document, in wiki navigate to the location you want to place your wiki page. Once in there click on Create and then select the appropriate template from the *Templates* menu which opens in the right side



The template will open up. In the document there are two sections related to document review

- **Required Set of Reviewers:** this is a dynamic table that will be filled by the system with people as appointed reviewers are entered in the associated issue type. When the document is first created, it's still not associated to any issue type and in so reviewers are not known, so there is no table on the wiki and the status is set as *Draft*
- **Additional Reviewers:** this is a static table that can be filled by users at will. The doc review system will not manipulate this table in any way, nor will take it into consideration for any action performed in the associated issue type. This is a place holder for adding additional reviewers which for any reason are not appointed in the associated issue type.

When the wiki is first created, these two sections look as follows

Required Set of Reviewers

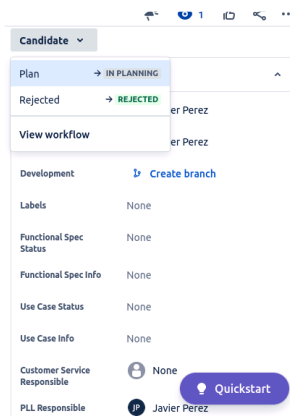
Overall Status: *Draft*

Additional Reviewers

| Functional Area | Reviewer | Status |
|------------------|----------|--------|
| Customer Service | | |
| Engineering | | |
| PLL | | |
| System Test | | |

Issue to Wiki Association

Let's take epic as an example (value stream works in a similar way). The following is a screen-shot of an epic in which the PLL Responsible has been appointed but no UC has been associated to the epic yet (notice the empty Use Case Info field). The epic has been transitioned to *Candidate*, but it can't progress further to *Committed* because no UC has been associated to it yet



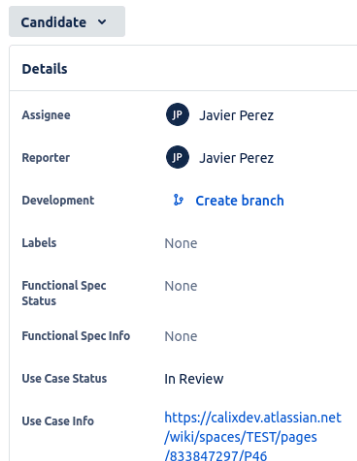
Moreover, since (and only when) PLL has been assigned in the epic, this person will receive email with a notifications to enter a UC wiki link in the Use Case Info field, like this

```
1  Fom:Use Case Document Workflow Admin <noreply@calix.com>
2  Subject: Review waiting for your action
3  Body:
4  Issue <epic_link> has been transitioned to Candidate
5  As the PLL Responsible, please, enter the corresponding Use Case wiki link in Use Case Info field
6  The Use Case document must be Approved(when required) for the Epic to transition to "Committed" status
7
8      Epic: <epic_link> - <epic_summary>
9      FixVersion: <fixVersion>
10
11 Please Note: This email has been auto-generated by the Document Workflow Admin. If you have any questions, please
```

- ✔ A similar email is sent to the Engineer Responsible (if assigned) when the epic is transitioned to *In Progress* and there is no FS associated to the epic

Going back to the wiki created from the [template](#), getting the page link and entering it in the Use Case Info field will have two effects:

- In the epic, Use Case Status changes to *In Review*




- In the associated wiki, the required reviewers table shows up, with the PLL entry already populated and other entries still empty (since no other responsible has been appointed in the epic).

Required Set of Reviewers

| Overall Status: In Review | | | |
|---------------------------|--------------|-----------|----------|
| IAE-46 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | | | |

The Jira epic and the wiki document are now linked (associated). From now on, changes in the [responsible](#) fields in Jira will be reflected in the Required Set of Reviewers panel and [review statuses set](#) in the wiki will be propagated back to the UC/FS status field in the Jira epic.

If a user otherwise enters a not valid wiki link in the Info field, the Info field value is reset to blank and a explanatory comment is posted in the epic.

 When *Info* fields contain a wiki url, whenever this url is replaced or dropped the association between the epic and the referenced document is also dropped (all approval records will be lost)

Multiple Epics to Same Wiki Association

It is possible that two or more epics have the same associated wiki (those two or more epics have the same link in the Use Case/Functional Spec Info field). When this happens, the Required Set of Reviewers panel will show two (or more) tables, one per epic. Following is displayed a panel on a wiki page with two epics which have that same wiki associated

Required Set of Reviewers

| Overall Status: In Review | | | |
|---------------------------|--------------|-----------|----------|
| IAE-46 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | | | |
| IAE-47 | | | |
| | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | | | |

Each table will be populated independently based on the field values entered in the corresponding epic fields in Jira

Understanding the Required Set of Reviewers Panel

The Required Set of Reviewers panel is composed of one or more tables, each table representing the approved status of the document for a particular issue type, for all the issue types associated to the document. We'll then refer to table in the panel and its corresponding issue type indistinctly

The Required Set of Reviewers panel consist of:

Panel Header

The header indicates the overall status of the document, which is the cumulative status of all the issue types which are in the section. The cumulative status is calculates in this way:

- In review: the document has not been approved for at least one epic and also the document has no rejections

Required Set of Reviewers

| Overall Status: In Review | | | |
|---------------------------|--------------|-----------|----------|
| IAE-46 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | | | |
| IAE-47 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | | | |

A panel with an issue type still in review has an overall status of in review, even if the other tables show approved

Required Set of Reviewers

| Overall Status: In Review | | | |
|---------------------------|--------------|-----------|----------|
| IAE-46 | | Approved | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | | ✓ |
| Engineering | Javier Perez | | ✓ |
| PLL | Javier Perez | | ✓ |
| System Test | Javier Perez | | ✓ |
| IAE-47 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | ✓ ✗ | |
| Engineering | Javier Perez | ✓ ✗ | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | Javier Perez | ✓ ✗ | |

- Rejected: the document has been rejected for at least one issue type of those in the panel

Required Set of Reviewers

| Overall Status: Rejected | | | |
|--------------------------|--------------|-----------|----------|
| IAE-46 | | Rejected | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | ✗ |
| System Test | | | |
| IAE-47 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | | | |

- Approved: the document has been approved for all the issue types in the panel

Required Set of Reviewers

| Overall Status: Approved | | | |
|--------------------------|--------------|----------|----------|
| IAE-46 | | Approved | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | | ✓ |
| Engineering | Javier Perez | | ✓ |
| PLL | Javier Perez | | ✓ |
| System Test | Javier Perez | | ✓ |

| Overall Status: Approved | | | |
|--------------------------|--------------|----------|----------|
| IAE-47 | | Approved | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | | ✓ |
| Engineering | Javier Perez | | ✓ |
| PLL | Javier Perez | | ✓ |
| System Test | Javier Perez | | ✓ |

Table Header

Each table in the panel has a header with the key of the issue type it represents (the key is a link to the issue type itself in Jira) and the review status for that particular issue type. The status of the review is also indicated by the header's color. Status is calculated in this way:

- In review: the document has not been approved for at least one area responsible and also the document has no rejections

| IAE-44 | | In Review | |
|------------------|--------------|-----------|----------|
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | ✓ ✕ | |
| Engineering | Javier Perez | ✓ ✕ | |
| PLL | Javier Perez | ✓ ✕ | |
| System Test | Javier Perez | ✓ ✕ | ✓ |

- Rejected: the document has been rejected for at least one area responsible

| IAE-44 | | Rejected | |
|------------------|--------------|----------|----------|
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | ✓ ✕ | |
| Engineering | Javier Perez | ✓ ✕ | |
| PLL | Javier Perez | ✓ ✕ | |
| System Test | Javier Perez | ✓ ✕ | ✕ |

- Approved: the document has been approved by all the reviewers

| IAE-44 | | Approved | |
|------------------|--------------|----------|----------|
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | | ✓ |
| Engineering | Javier Perez | | ✓ |
| PLL | Javier Perez | | ✓ |
| System Test | Javier Perez | | ✓ |

- ✓ When a document is approved for a particular issue type, its corresponding table status changes to *Approved* which is also a link to the version of the wiki when the issue type was approved. Refer to [Document Approvals Marks](#)

Table rows

Each table has entries (rows) for the areas which are required to review the document. There are columns for

- Naming the particular Functional Area
- Who in that functional area was appointed to review the document (reminder, this is filled feeding from the corresponding field in the associated Jira epic)
- Action controls, clickable icons to approve or reject the document
- Document review status for the functional area.

- ✓ A functional area can have multiple reviewers

If the applicable responsible field in the Jira issue type is a multiselect user, each reviewer entered in the field will also be displayed in the reviewers table. This is shown in the following table for the case of *Engineering*

| Overall Status: In Review | | | |
|---------------------------|------------------------|-----------|----------|
| IAE-48 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | Javier Perez | ✓ ✗ | |
| | Shesha Tumkur Prasanna | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | Haritha Lukka | | |

The presence of functional areas can be different per project, issue type or be dependent of the committed field. For example, *Product Security* may be present in some projects and not in others. *Customer Service* is applicable for *Epics* but not for *Value Streams*. An area where its *committed* field has been set to *Not Required* won't have a functional area responsible in the table.

| Overall Status: Approved | | | |
|--------------------------|--------------|----------|----------|
| IAE-48 | | Approved | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | | ✓ |
| Engineering | Javier Perez | | ✓ |
| PLL | Javier Perez | | ✓ |
| System Test | Javier Perez | | ✓ |
| Product Security | Javier Perez | | ✓ |

- ✓ Functional areas can be added/removed per project and be defaulted to a user. This can be set by administrators by adding entries in the default values configuration file

Approving or Rejecting a Document

Reviewers approve or reject a wiki by operating on the *Action* controls:

- A click on the green check icon will signal that the document is approved.
- A click on the red cross icon will signal that the document is rejected.

The result of the action is recorded in the *Approved* column

Action controls are only available for those appointed to review the document. This means that for a person who is visiting a wiki

- If the person is not listed in the table as a reviewer, that person will not be able to approve/reject a document.
- If the person is listed in the table as a reviewer, that person will be able to approve/reject a document only for the areas where is listed

This is demonstrated in the following screen-shot

| Overall Status: In Review | | | |
|---------------------------|------------------------|-----------|----------|
| IAE-48 | | In Review | |
| Functional Area | Reviewer | Action | Approved |
| Customer Service | | | |
| Engineering | Shesha Tumkur Prasanna | | |
| PLL | Javier Perez | ✓ ✗ | |
| System Test | Haritha Lukka | | |

- The appointed PLL is visiting the page and in so he has options to approve/reject the document for the PLL functional area
- This person is not listed as reviewer for Engineering and System Test, so he doesn't have options to approve/reject the document for these areas
- Customer Service is not set in the associated epic, hence the *Reviewer* column is empty

When a document is rejected by any reviewer, the PLL responsible for the epic (in the case of UC) or the Engineer (in the case of FS) receive an email with the rejection notification. The email has this format

```
1 From: Jira Cloud Admin <noreply@calix.com>
2 Subject: Document Review for epic <epic_key> has been rejected
3 Body:
4 Review of document <link_to_wiki> has been rejected by <person_who_rejected_it>
5 Jira Epic <link_to_jira_epic>
```

Restrictions after approving a document

By operating in the *Action* controls and while the issue type is in review status, each area responsible is allowed to approve or reject a document as many times as deemed. However, once all reviewers have approved the document, the *Action* controls disappear and the document will permanently stay in approved status. This is displayed in the following screen-shot

| AE-13 | | Approved | |
|------------------|--------------|----------|----------|
| Functional Area | Reviewer | Action | Approved |
| Customer Service | Javier Perez | | ✓ |
| Engineering | Javier Perez | | ✓ |
| PLL | Javier Perez | | ✓ |
| System Test | Javier Perez | | ✓ |

Additionally, changes in the responsible fields in the associated Jira issue type which would normally be propagated to the reviewers table won't be so if a document is already approved.

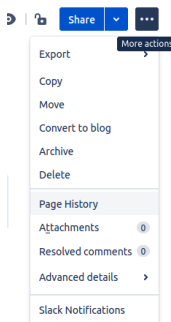
Epics family and transition restrictions

An epic family is formed by those epics which have the same associated UC/FS. Another way of seeing it, all epics displayed in the Required Set of Reviewers panel in a document under review forms a family. For example, the two epics displayed when explaining the [Panel Header](#) section forms a family.

An epic with an associated Use Case which has been approved for that epic is free to be transitioned to *Committed*, even though the epic may have not approved siblings in its family. However, an approved epic can't be transitioned to *Resolved* unless its associated Functional Spec had been approved for all the members in the family.

Document Approval Time Stamp and Versioning

Wiki pages are versioned, in the way that when a wiki is published it gets a new version assigned. A wiki page version history can be displayed by accessing the ellipsis menu and selecting Page History



This is an example of a page history

| Compare selected versions | | | | | |
|---------------------------|-----------------------|----------------------|------------|--------------------------|------------------|
| Select | Version | Published | Changed By | Comment | Actions |
| <input type="checkbox"/> | CURRENT (v. 3) | About an hour ago | CA | Approved for epic IAE-47 | |
| <input type="checkbox"/> | v. 2 | About an hour ago | CA | Approved for epic IAE-46 | Restore - Delete |
| <input type="checkbox"/> | v. 1 | Yesterday at 7:12 PM | JP | | Restore - Delete |

When a document is approved for a particular issue type, a mark in the form of a note in the *Comment* column is introduced in that document versions history. These marks allows to visit the version of the document which was approved for each one of its associated epics. Used notes are shown in the above screen-shot.

Reviews Reports

These are the different kind of reports available to get information on pending doc reviews

Pending Doc Reviews per User

Using a wiki macro

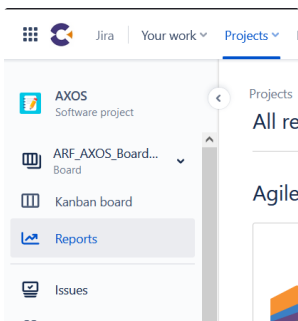
You can find what documents are pending of your review by inserting the *Pending Document Reviews* Macro on a wiki page of your choice. More information on [Confluence Macros | Pending Document Reviews](#)

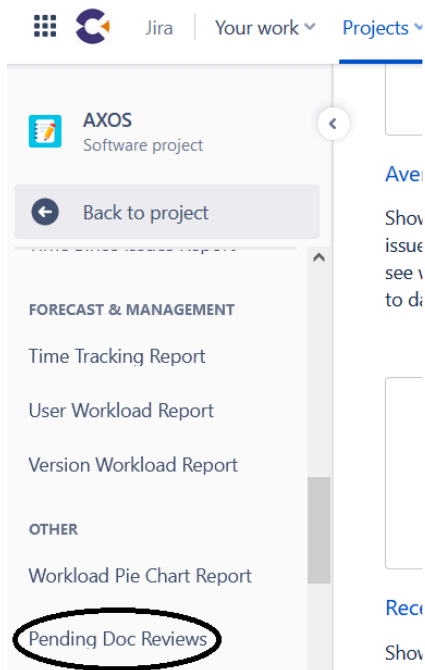
Using a wiki page

You can list what documents are pending of your review by creating a child wiki page to [Pending Doc Reviews per Author](#), which will periodically be populated by the system. The same wiki page gives instructions on how to do this

Pending Doc Reviews per Project

You can find what documents are pending of review and who are the reviewers by clicking on the the *Pending Doc Reviews* link located in the Jira project *Reports* area





The report is a table listing the epics with UC/FS status field with values *draft* and *in review* and the associated document, if any (this is the entry in UC/FS info). This table looks like the one below

Pending Doc Reviews

| Epic | Fix Version | Document | Doc Type | Status | Reviewers |
|----------------------------|--------------|----------|-----------------|--------|-----------|
| AXOS-39256 | None | | Use Case | None | |
| AXOS-39256 | None | | Functional Spec | None | |
| AXOS-39255 | None | | Use Case | None | |
| AXOS-39255 | None | | Functional Spec | None | |
| AXOS-39253 | None | | Use Case | None | |
| AXOS-39253 | None | | Functional Spec | None | |
| AXOS-39157 | AXOS-R22.2.0 | | Functional Spec | None | |

Excel capable consolidated report

Document review information is fed into a database for centralization and reporting purposes. The database is daily queried into a [text file](#), which can be loaded with excel. To do this, download the file and open it with excel. When asked, select to open the file with tabs delimiter. Excel should display a similar view to this one

Because of the way the report is generated there will be a row for each combination of the area responsible values. The following view (for clarity only the area responsables have been extracted) is an example:

| | A | B | C | D | E | F | G | H |
|----|--------------|---|---------------|---|-------------|---|------------|---|
| 1 | Chad Whitten | a | Adam Morawicz | a | George Wong | a | Cary Yang | a |
| 2 | Chad Whitten | a | Adam Morawicz | a | George Wong | a | Joe Garcia | a |
| 3 | Chad Whitten | a | Adam Morawicz | a | George Wong | a | Leo Lin | a |
| 4 | Chad Whitten | a | Anna Young | a | George Wong | a | Cary Yang | a |
| 5 | Chad Whitten | a | Anna Young | a | George Wong | a | Joe Garcia | a |
| 6 | Chad Whitten | a | Anna Young | a | George Wong | a | Leo Lin | a |
| 7 | Chad Whitten | a | Eric Zhou | a | George Wong | a | Cary Yang | a |
| 8 | Chad Whitten | a | Eric Zhou | a | George Wong | a | Joe Garcia | a |
| 9 | Chad Whitten | a | Eric Zhou | a | George Wong | a | Leo Lin | a |
| 10 | Chad Whitten | a | Jeff Qin | a | George Wong | a | Cary Yang | a |
| 11 | Chad Whitten | a | Jeff Qin | a | George Wong | a | Joe Garcia | a |
| 12 | Chad Whitten | a | Jeff Qin | a | George Wong | a | Leo Lin | a |

The view corresponds to epic [EXOS-13727: \[Hardware\] GigaPro™ GPR8802x - Elvis 8+8 \(8 Ethernet and 8 POTS\) PoE switch \(code name: Elvis 8+8\) MVP](#) CLOSED and FS Functional Spec wiki

[FS: GigaPro™ GPR8802x- Elvis 8+8 \(8 Ethernet and 8 POTS\) PoE switch \(code name: Elvis 8+8\) MVP](#)

Here the multiple values of *Engineering* and *System Test* have been combined to create the many rows. This is expected and needed for a consolidated view in a single spread sheet of all the available data. To focus in a particular area, create an excel view with the column of interest (either *Customer Service*, *Engineering*, etc.) and remove duplicates.

This other [text field](#) is a reduced version which filters rows by *none* and *unassigned*.

Text files with the database information are regenerated daily

Other alternatives

Jira filters

A user can create and subscribe to a jira filter so results would be emailed by jira with a chosen periodicity. The jira filter jql would be something like this:

```
1 Project=<project> and "<doc type> Status" = "In Review" and <responsible> = <user> and <other_criteria>
```

This is an example

```
1 project = axos and fixVersion = AXOS-R22.3.1 and "Functional Spec Status" = "In Review" and "Engineering Respons
```

Note: Jira filter subscribers may be receiving emails which may include reference to wikis that they may have already been reviewed, since the search criteria is that the overall status is “In Review” (overall status is *in review* whenever there is at least one responsible who hasn’t approved yet, who may not be the filter subscriber).

The Jira vendor has [documentation](#) on working with filters. This documentation includes how to [subscribe to a filter](#)

Create a CPEGSR ticket request if you have some search criteria in mind which you need help to put into a Jira filter

PowerBI reports

You can create a CPEGSR ticket requesting a report that would show the data in a format of your choice.

FAQ

✓ I can't transition my epic to Committed

To be able to transition an epic to In Committed, its Use Case Status field value must be either

- Approved

- Not required (with a reason in the Use Case Info field)

Additionally, these fields need to have a Yes value: *Dev Committed*, *PLL Committed* and *Solution Test Committed*

▼ I can't transition my epic to Resolved

- Confirm that the epic has an assignee
- Confirm that the user who is doing the transition is the assignee
- Confirm that the FS contains the docReview macro
- To be able to transition an epic to Resolved, its Functional Specification Status field value must be either
 - Approved
 - Not required (with a reason in the Functional Specification Info field)
- An epic can be transitioned to resolved only if all the epics in the family have an approved Functional Specification associated wiki
- Additionally (due to other transition requirements) confirm that *Dev Committed*, *Solution Test Committed* and *PLL committed* are set to "Yes"

▼ Transition to Resolved doesn't happen automatically

- All children, even those that are not story type, should be in resolved status for the system to automatically transition an epic to resolved
- The Epics's Functional Specification Status field value must be either
 - Approved
 - Not required (with a reason in the Functional Specification Info field)
- Additionally (due to other transition requirements) confirm that *Dev Committed*, *Solution Test Committed* and *PLL committed* are set to "Yes"

▼ My epic seems to have dissapeared from the associated wiki reviewers panel

If you transition your epic to Not Required once the epic has been associated to a wiki, the system will drop the epic from that associated wiki, even if the <UC/FS> Info field still has a valid wiki url.

▼ The Required Review Panel is not displayed/updated on the wiki

Checkout following conditions:

- The associated wiki needs to have been created with the appropriate template, as explained per the [Document Templates and Reviewers Sections](#) section
- For the Required Review Panel to be displayed on a wiki its associated epic must have been created after 2021-09-24 or its fixVersion must be 22.x. Additionally for fixVersion, if a wiki is already associated to an epic and it wasn't originally created with the doc review template (it was changed later), the url should be dropped from the UC/FS Info epic field and re-enter it again as-it-is for the review workflow to kick-in
- The Required Review Panel is static and as such it will stay as-you-see-it until you refresh the page, or alternatively, you open a new tab with your document.
- The <doc_type> Status field is set to *Not Required*. If this is the case, no matter whether <doc_type> Info field is a valid wiki link, the reviewers panel won't update because the system assumes that an associated wiki is not required. To get out of this situation, set <doc_type> Status field to *Draft*

▼ The Required Review Panel is not loading on the wiki There is a message Loading app... instead

The panel won't load if you are accessing from particular offices (CVIL at the time of this writing). This is a communication restriction set by the network team.

▼ The status field value is none even when the info field has a valid url to a document


For the *status* field to display the value corresponding to the review status the epic should have been created after 2021-09-24 or its fixVersion must be 22.x. Additionally for fixVersion, if a wiki is already associated to an epic and it wasn't originally created with the doc

review template (it was changed later), the url should be dropped from the UC/FS Info epic field and re-enter it again as-it-is for the review workflow to kick-in

✓ How to remove an epic from the panel

In some situations it may be need to remove an epic from a panel, for example when the epic has been de-scoped or moved to a different project. To remove an epic from a wiki reviewers panel,

- Verify the <Use Case|Functional Spec> Info field value
 - If it's *None* or *In Review*, go to next step
 - If it's *Not Required* set it to *Draft*
 - If it's *Approved*, it can't be changed. Refer to your admin
- Verify the <Use Case|Functional Spec> Info field value
 - If it's not the wiki url, enter the wiki url
- Drop the link to the wiki in the epic's <Use Case|Functional Spec> Info field

 Dropping the link in the info field will reset all approvals: if you made a mistake and want to put it back, the epic will be back in the panel, but all approvals will be gone

In the case of moving an epic from one project to another, the documentation link needs to be dropped before the epic is moved

✓ Reviewers are not accurate on the wiki review panel

If area responsables in the wiki are not matching those of the epic, remove one responsible from the epic and put the name back. This will trigger the system to recalculate the area responsables in the wiki review panel

✓ Reviewers changes in the epic (or any other applicable changes) don't propagate to the view review panel

For the reviewers to be updated on a wiki its associated epic must have been created after 2021-09-24 or created before 2021-09-24 but its fixVersion must be 22.x.

✓ How to avoid the system to transition the status field to in review when the document is still in draft status

The system automatically transitions the status field to *In Review* whenever there are area responsables in the epic, or responsables are added to the epic. This may not be the desired action when the document is still in draft but however the fact that there is a document needs to be communicated

The system will no attempt any change in the status workflow if what is entered in the info field is anything but a valid link to a wiki page. Taking this into account, to avoid a transition of the status field to *in review* when the wiki is still in draft, enter the page title on the info field (just the title, no url). Following are examples of scenarios solved by this action:

- The PM would know that there is a wiki associated with the epic
- Other users who want to collaborate in the document would know which one is the wiki in the works

Once the wiki is ready for review, replace the title by the wiki's full url, which would trigger the engage of the workflow

✓ Workflow restrictions don't seem to be applied (epics can be resolved without associated wikis, etc.)

- Confirm with your admin that the epic workflow is the *Calix Epic Workflow With Doc Review*
- Confirm that the epic was created after 2021-09-24 or if created before 2021-09-24 then its fixVersion must be 22.x.

✓ How to link an epic with a wiki when the Info field had bee set to Not Required

- Transition the status field to *Draft*
- Add the wiki url to the Info field
- Add an area responsible (or remove and add back one existing one)

✓ Functional area responsible is not displayed in the reviewers panel

Check the following

- Is the functional area applicable to the project?
- Is the functional area applicable to the issue type? (Value Stream, Epic)
- Is the value of the *committed* field associated with the functional area (for example *Solution Test Committed*) *Not Required*?

Also, if the *committed* field was ever set to *Not Required* as it was then set to a different value, the system will re-engage if the functional area responsible is removed and added back

Training

Recording of the training sessions:

PST Time Zone

Topic: Review Workflow Automation for Usecase and FS document - Session(1/2)

Date: Sep 23, 2021 10:53 AM Pacific Time (US and Canada)

Share recording with viewers:

https://calix.zoom.com/rec/share/O2ZwsLFgYgQ6VO_wzqjwFJzpezXySQvo7xw_sCUkfkW6I5bmHF-OhFkbiwrO6OKu.r6x13kln0767xHxC

(Access Password: !p.6=9Hq)

CDC and IST Time Zone

Topic: Review Workflow Automation for Usecase and FS document - Session(2/2)

Date: Sep 23, 2021 08:57 PM Pacific Time (US and Canada)

https://calix.zoom.com/rec/share/NG04RoSYPfH4G8lceANZAfLQxazBLQ5-NCOKr8Xf-OA3HuT_Kcp9JeqtJRdJzIRp.TLcnlAXA1R9eJFTC

(Access Password: i8Ts+yej)