SHERPAFLOW
GUIDE TO SUCCESS

SherpaFlow

Salesforce Application Installation Guide

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Overview

SherpaFlow automates and optimizes project management processes, facilitating efficient development cycles and seamless release coordination for teams. Built on the Salesforce platform, it provides a user-friendly interface for anyone with a Salesforce license.

Installation Steps

Step 1: Log in to Salesforce:

Navigate to Salesforce and Enter your Salesforce credentials

Step 2: Access the AppExchange

In the Salesforce interface, click on the "App Launcher" (grid icon) in the top-left corner.

Step 3: Find the SherpaFlow App:

3
Click "Install"

4
Ensure All 3 Sherpa Flow App ssuccessfully downloaded

Sherpaflow Console

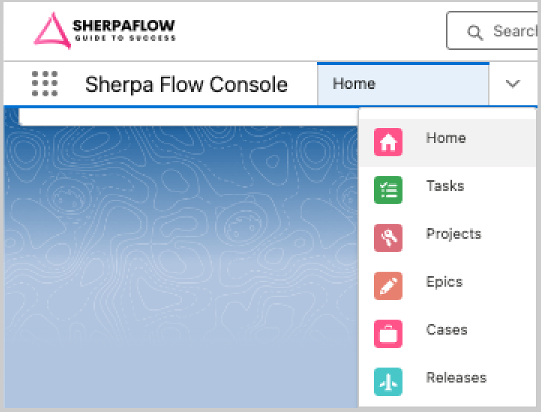
The SherpaFlow console offers a comprehensive overview of your tasks and their influence on case development within a release, providing enhanced clarity and insight into project progression.

Recommendation: To enhance visibility, it is advised to include your tasks, blocked cases, and releases. This approach ensures that you stay informed about any cases requiring attention within the scope of your current work.

- “My Cases”- provides project managers with a concise list detailing the cases currently under development along with their respective statuses, facilitating effective oversight and management of ongoing projects.
- “Blocked Cases” - cases with populated "block reasons" are flagged as blocked, visually indicated by a red flag for easy identification.
- “Open Tasks” - displays tasks assigned to each case, providing comprehensive details such as priority, due dates, and their relationship to the respective case.
- “All” - List of Releases currently present within all Projects

Sherpaflow is structured around five primary components, conveniently presented as tabs for user-friendly access:

- Projects
- Tasks
- Epics
- Cases
- Releases



Releases

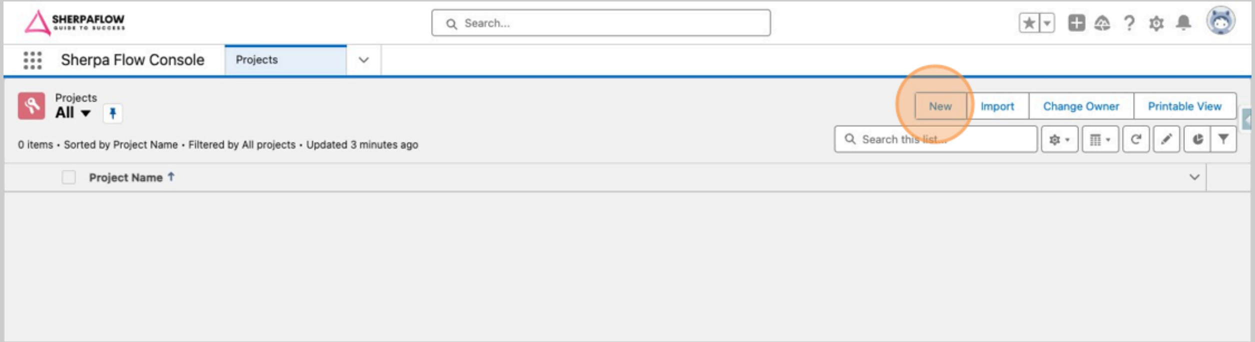
Projects

Unlock the full potential of Sherpaflow's project management capabilities with this invaluable feature. If your company focuses on diverse Salesforce products while collaborating with a **single client**, harness the power of the "Projects" functionality. This allows you to precisely segregate and oversee projects tailored to that specific client.

For individuals specializing in a single Salesforce product while serving **multiple clients**, this tool empowers you to systematically categorize taking into account the distinct needs of each client, minimizing any potential for confusion.

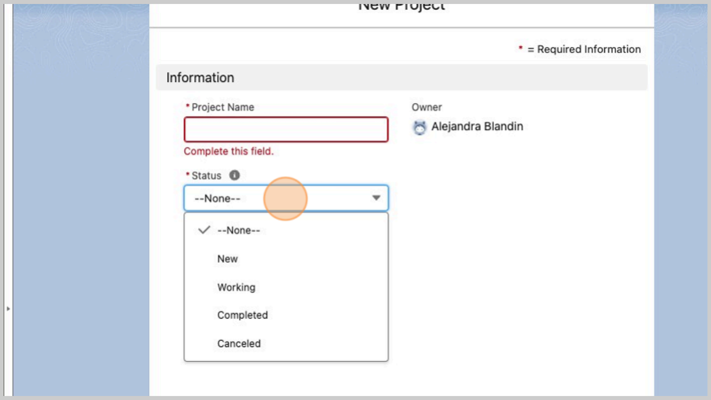
How to create a Project

Select "Project" from the dropdown menu, click on the **"New"** option to initiate the creation of a new project.



Specify the project name and consider including relevant information such as the client's name or the specific product associated with the project.

In managing your projects, it's crucial to understand the various status options available. These include **New, Working, Completed, and Canceled.** This flexibility allows you to input both historical and upcoming projects, providing enhanced visibility for your team to better comprehend their workload. Take note of the description field. Utilize this space to include any pertinent details related to the client or project, ensuring a comprehensive record of information.

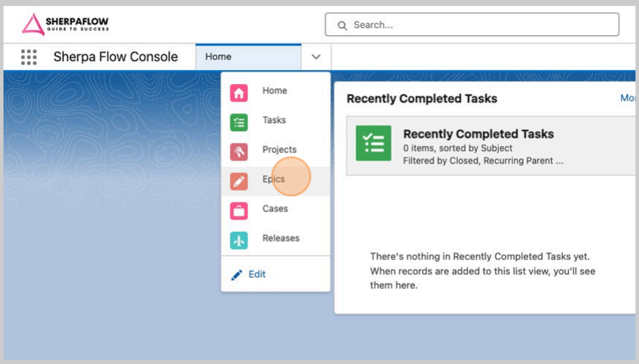


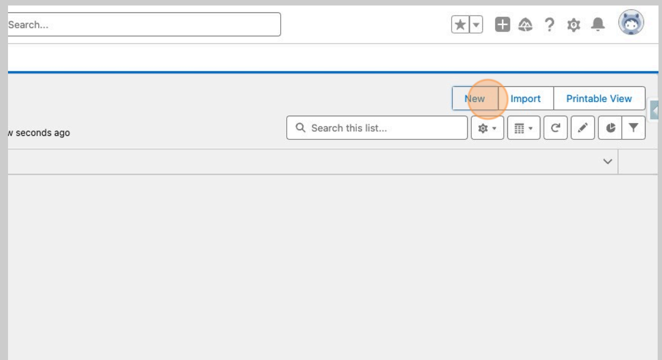
Epics

Epics simplify complex projects by breaking them into manageable sections. Linked to **Cases** and **Projects** within Sherpaflow, they act as categorization tools, enabling the team to easily identify the specific topic under development.

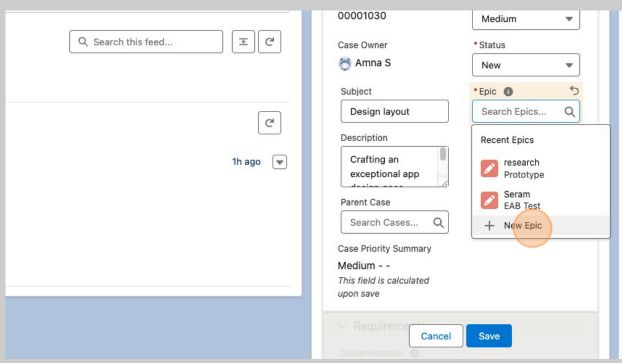
How to create an Epic

One way is through the Epic tab





Given that Epics are linked to cases, a new Epic can be created when a case is generated, particularly if none of the existing options align with the specific requirements of the case.

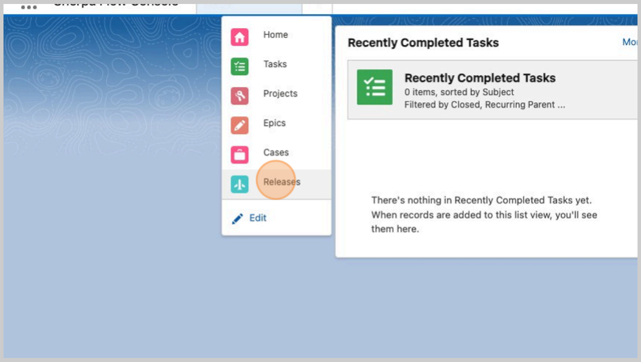


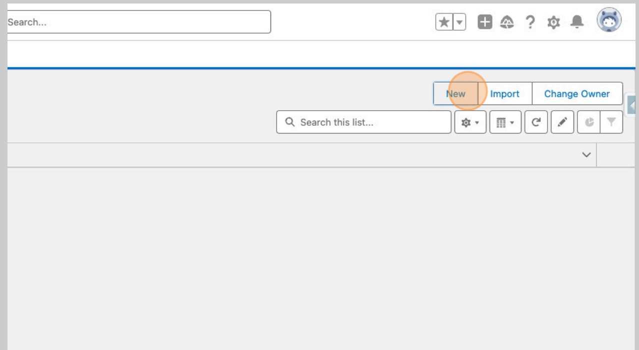
Releases

Releases serve as critical milestones. It's not just about the team's internal progress but about delivering a product that meets or exceeds customer expectations. The release represents a commitment to providing a tangible, finalized version of the product that has undergone thorough testing and is deemed ready for customer use.

How to create a Release:

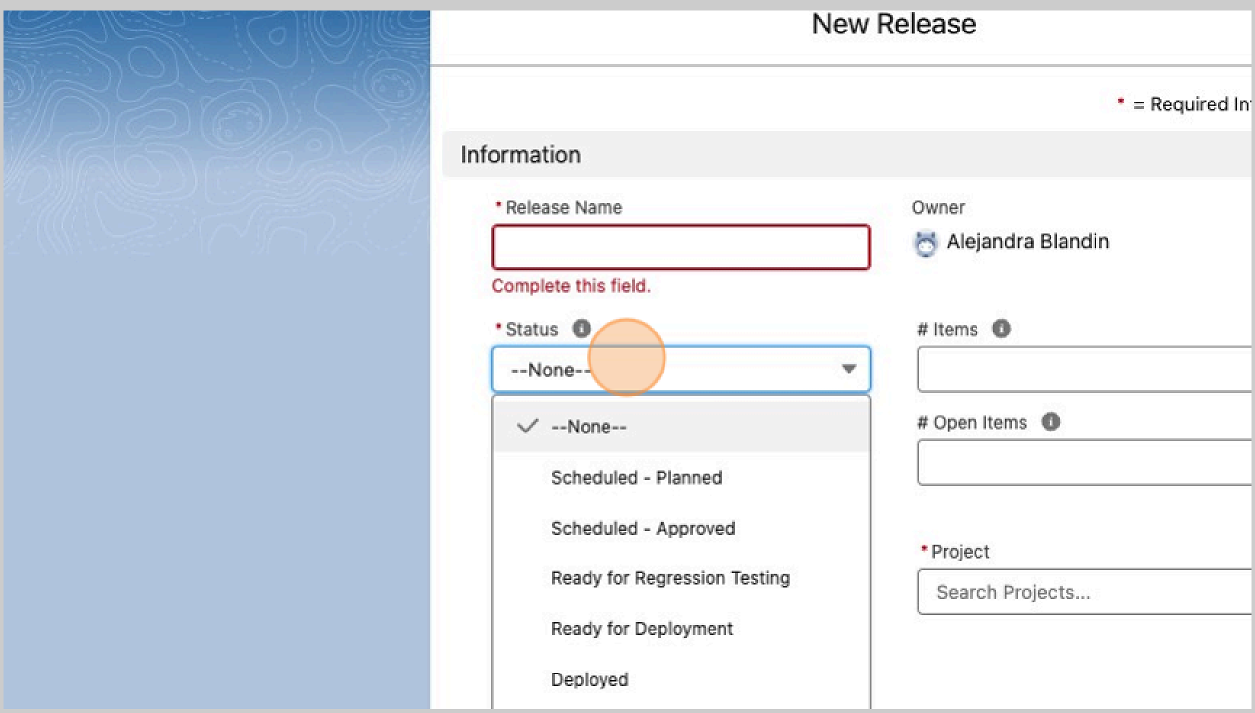
From the main tab, releases can be created by clicking “New”





Here you can enter any name convention your team has to track releases; as well as, link the project to which the release is related to

There are 6 predetermined options for status:
Scheduled - Planned:
Scheduled - Approved:
Ready for Regression Testing:
Ready for Deployment:
Deployed:
Canceled:



Cases

Here is the central hub where all the essential information meets! Cases outline the necessary components for successful implementation. Each case details a clear roadmap for the team during the development process. This systematic approach ensures effective communication within the team and a comprehensive understanding of project objectives.

SherpaFlow offers three predefined types of cases to cater to different project needs:

1. **Development Item:**

This case type adheres to the traditional development cycle, progressing step by step through the established procedures your team follows to complete tasks. It provides a structured approach for comprehensive development processes.

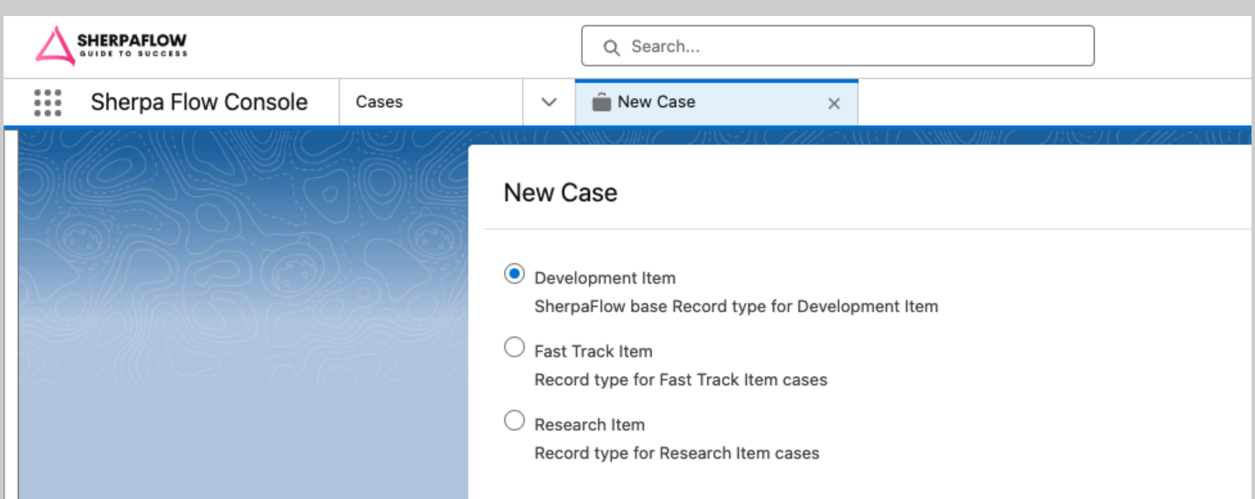
2. **Fast Track Item:**

Designed for efficiency, the Fast Track Item involves a shortened cycle with minimal involvement. This case type is ideal when rapid deployment to production is essential, provided it meets the required functionality. It streamlines processes, reducing the time needed for approval and implementation.

3. **Research Case:**

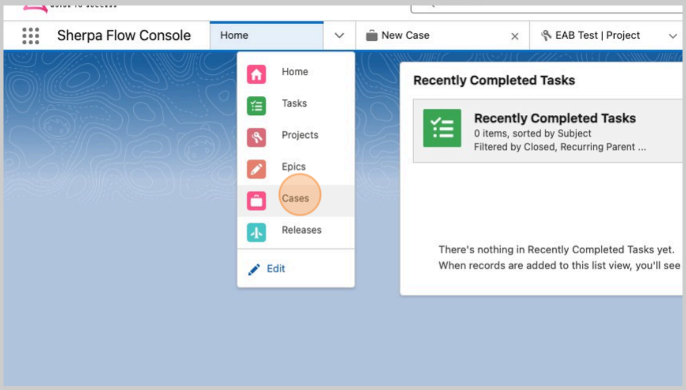
The Research Case is tailored for situations where development is required, but the process doesn't need to move through various departments or follow the entire cycle. It allows for a focused exploration of specific aspects without the formalities of the complete development lifecycle.

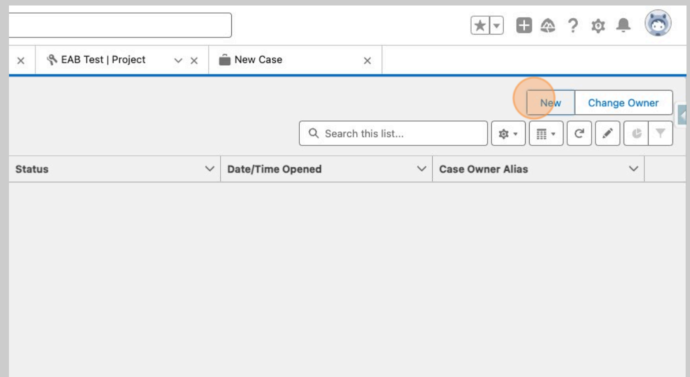
These distinct case types in Sherpaflow provide flexibility and adaptability to diverse project scenarios, enabling your team to choose the most suitable approach based on the nature and urgency of the task at hand. Whether following a traditional cycle, opting for a faster track, or engaging in research-focused development, Sherpaflow accommodates different project requirements seamlessly.



How to create Case

Similar to Projects, cases can be created from the tab section from **“Home”** and then Clicking **“New”**





- Priority: The default field comes with three predefined options: **high, medium, and low.** It's worth noting that these priorities can be updated according to your team's specific categorization or priority scheme.
- Epic: As mentioned above, this will enable your team to seamlessly link and categorize your case
- Project:

Within the case there are key fields that ensure a centralized collection of requirements and other key data.

Requirements:

Documentation- captures the urls where your team manages all the projects documentation

Level Of Effort- displays the time and workload intensity it will take to complete the case. *This field can be personalized based on your team

Functional Requirements- functional requirements obtained from the discussions with the client

Technical Requirements- details what will be used to build the functionality based on requirements

Layout/User Interface-explains any layout updates that may need to be reviewed

Permissions/Access- details permissions that may be added, updated or removed

Testing Notes-captures any remarks that may be overlooked while testing that are not impacted by the already mentioned fields

Data Migration-

Training & Communication

Tracking:

Release-

Next Step-

Version-

Version Reason-

Environment-

Block Reason-

Case Origin-

Installation Guide :

https://scribehow.com/shared/Installing_and_Configuring_a_Salesforce_App_and_Components__RYOpj9tbT0GYPgwkwWDt2g

Dynamic has each own epic, large thing and organize teams have different use caes.

Project- community case s vs flows

Mehotds represent they life cyclwee

How to create Epics

Configuration

Permission Sets:

There are 5 permissions that can be assigned and this will influence the

1. Developer
2. Project Manager
3. Clone
4. System Manager
5. UAT User

Permission Set	Description
Mission Control Full	Full Access to the Mission Control Application
Mission Control Full Classic Only	Full Access to the Mission Control Application. Access to Classic App and VF Tabs, but not LEX App and Components
Mission Control Full LEX Only	Full Access to the Mission Control Application. Access to Lightning App and Components, but not Classic App and Visualforce Tabs
Mission Control Full No Apps	Full Access to the Mission Control Application, but does not have any Apps assigned.
Mission Control Full No Financials	Full Access to the Mission Control Application with no visibility of Financial Fields (e.g. Billing or Cost) on the Role, Project, Milestone, Action, Time Log or Skill Assignment Objects
Mission Control Full No Currency Fields	Full Access to the Mission Control Application with no visibility of Currency Fields across any Object
Mission Control Full No Financials Classic Only	Full Access to the Mission Control Application with no visibility of Financial Fields (e.g. Billing or Cost) on the Role, Project, Milestone, Action, Time Log or Skill Assignment Objects. Access to Classic App and VF Tabs, but not LEX App and Components
Mission Control Full No Financials LEX Only	Full Access to the Mission Control Application with no visibility of Financial Fields (e.g. Billing or Cost) on the Role, Project, Milestone, Action, Time Log or Skill Assignment Objects. Access to LEX App and Components, but not Classic App and VF Tabs
Mission Control Full No Financials Read Only	Full Access to the Mission Control Application with no visibility of Financial Fields (e.g. Billing or Cost) on the Role, Project, Milestone, Action, Time Log or Skill Assignment Objects. Read-Only Field Level Security.
Mission Control Full Read Only	Full Access to the Mission Control Application. Read-Only Field Level Security.
Mission Control Opportunity & Product Fields	Access to the Opportunity & Product Fields required to auto-generate Projects within Mission Control from an Opportunity

EXAMPLE

6. Updating Page Layout s

Assign Permissions:

Ensure that appropriate permissions are assigned to users who will be using the app.
Navigate to Setup > Users > Permission Sets or Profiles to assign necessary permissions.
Step 7: Test the Installation:

After installation and configuration, test the app to ensure it functions as expected.
Perform basic tasks or workflows within the app to verify its functionality.

Additional Resources:

[Include any additional resources such as user guides, FAQs, or support contact information.]

Troubleshooting:

[Provide troubleshooting tips for common installation or configuration issues users may encounter.]

Support:

[Specify how users can seek support for any issues they encounter during the installation or usage of the app.]

How to Create a Project :

Custom Object :

- Name: sherpapm__Project__c
- Purpose: To track and manage individual projects for each client.

Project Status Tracking

- Each project includes real-time updates on the current status.
- Enables efficient monitoring and management of project progress.

Automation for Holistic View

- Automated system to provide a comprehensive overview of all open tasks (Open Items).
- Tracks total items, highlighting tasks currently pending or in progress.

Related Tab Features in Projects

- Cases: Displays all cases linked to the project, ensuring integrated case management.
- Epics: Represents different business lines, each Epic detailing a specific aspect of the business.
- Releases: Provides details on the development cycle, including phases and timelines.

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User Guide: Setting Up and Using Sherpaflow in Salesforce
Introduction
This guide outlines the steps for installing and configuring Sherpaflow in Salesforce, tailored for System Administrators.

Prerequisites
Ensure Sherpaflow is installed in your Salesforce environment.
System Administrator privileges are required.
Step-by-Step Guide

1. Assigning Permission Sets
Firstly, assign the necessary permission sets to the System Administrator.

Permission Set: System Manager

- Grants edit access to all objects installed with the app.
- Assign this set to the System Admin profile

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2. Creating and Understanding a Method
A Method organizes and manages various business tasks.

What is a Method?

A framework for categorizing tasks in business processes.
Contains a 'Method Version' with detailed tasks for a development cycle.
Creating a Method:

Create a Method for specific tasks like development or research.
Link it to a Method Version.

3. Configuring the Method Version and Method Stages

The Method Version and Method Stages are crucial for task progression and case management.

Method Version:

Lists all tasks in the development cycle.
Used as stages in the Salesforce case path.
Method Stages:

Different stages that are part of the Case path.
Ensure that Method Stage Names match when creating a path for case statuses.
This alignment is essential for the backend flows to run correctly.

Method Tasks:
Create Method Tasks to ensure task generation as the case status progresses.

4. Linking Method Record Type with Case Record Type ID
An important step is linking the Method Record type with the case record type ID.

18 Digit ID Field:

On the Method Record type, there is an 18 digit ID field.
This ID needs to be linked to the case record type ID.
This linkage enables the backend flow to associate the Method with the case type effectively.

5. Enabling and Configuring Path in Salesforce

It is recommended to enable and configure the Path feature in your Salesforce org settings.

Enabling Path:

Activate Path in your org settings to enhance the case management process.
The stages in Path should mirror the Method Stages for consistency.

Configuring Path on Lightning Page:

Once Path is activated, navigate to the Lightning page settings on the case object.

Add the Path to your page layout to ensure it's visible and functional in your case management interface.

Creating a Case in SherpaFlow:

- **Choose Record Type:** Start by selecting the right type for your case.
- **Add Details:**
  - EPIC: Enter the EPIC related to the case.
  - Subject: Write down the main issue or topic.
  - Link to Parent Case (If Needed): Optionally, connect your case to a related parent case.
- **Automatic Backend Process:**
  - The system automatically adds current method and version details to your case.
  - Case Ready: Your case is now set up with all essential information.

Creating Additional Case Record Types in SherpaFlow:

Navigate to Case Object:
- Start by going to the Case Object section within SherpaFlow.

Access Record Types:
- In the Case Object, find and select the 'Record Types' option.

Create New Record Type:
- Choose to create a new Record Type.
- After creation, copy the 18-digit ID field of this new record type for later use.

Go to Methods Object:
- Navigate to the Methods Object area in SherpaFlow.

Create a New Method:
- Initiate the creation of a new Method within the Methods Object.

Link Case Record Type with Method:
- Link the newly created Case Record Type with the Method.

- Do this by adding the copied 18-digit ID from step 3 into the 18 Digit ID Field in the Method.

By following these steps, you can successfully create and link a new Case Record Type with a Method in SherpaFlow.

Creating a Level of Effort in SherpaFlow:

Name Field: This field is used for the name of the LOE. This should be a text field. We recommend naming this with the days and the length of task . i.e 01 Days - Small
Days Field: This field is designated for entering the name of the LOE and should be formatted as a text field. We recommend naming it in a way that reflects both the duration and the scope of the task. For example, '01 Days - Small' indicates a small task estimated to take one day.

Conclusion
By following these instructions, Sherpaflow will be correctly set up in your Salesforce environment, ensuring efficient task management and process flow.