Sample Jira Workflow and Automation 2

Microsoft Windows Server Deployment Project

Workflow Stages:

- Planning: Define scope, gather requirements, and create initial plans.
- Preparation: Procure hardware, set up the environment, and configure prerequisites.
- Deployment: Install Windows Server and configure roles and features.
- Testing: Validate functionality, test user access, and ensure performance.
- Handover & Monitoring: Transition to the operations team and monitor post-deployment.

Workflow Statuses:

- Backlog
- To Do
- In Progress
- In Review
- Testing
- Blocked
- Done

Workflow Stages

1. Planning (10 Issues):
   - Define project scope and objectives.
   - Gather system requirements (hardware, software, licensing).
   - Identify dependencies with existing systems.
   - Create a high-level project timeline.
   - Document roles and responsibilities.
   - Identify risks and mitigation strategies.
   - Procure Windows Server licenses.
   - Create a backup plan for critical systems.
   - Plan Active Directory (AD) structure.
   - Review and finalize project plan.

2. Preparation (15 Issues):
   - Procure and set up server hardware.
   - Install hypervisor (if using virtual servers).
   - Validate server hardware compatibility with Windows Server.
   - Configure basic network settings (IP, DNS, DHCP).
   - Prepare the domain controller environment.
   - Test network connectivity.
   - Ensure sufficient storage capacity.
   - Configure RAID for data redundancy.
   - Create bootable installation media.
   - Document existing server configurations.

- Train the team on server installation procedures.
- Create a rollback plan for critical errors.
- Validate Active Directory readiness.
- Test backup and recovery solutions.
- Review and approve preparation phase tasks.

3. Deployment (15 Issues):
   - Install Windows Server on the primary machine.
   - Configure initial settings (hostname, timezone, network).
   - Set up Active Directory and promote the server to a domain controller.
   - Create organizational units (OUs) in Active Directory.
   - Configure Group Policies (GPOs).
   - Install DNS and DHCP roles.
   - Set up file and print services.
   - Configure Windows Server Update Services (WSUS).
   - Set up user accounts and permissions.
   - Install additional roles (e.g., IIS, Hyper-V).
   - Deploy secondary domain controllers for redundancy.
   - Test replication between domain controllers.
   - Install required applications and services.
   - Validate secure access to server resources.
   - Document server configurations.

4. Testing (5 Issues):
   - Test user login and access to resources.
   - Perform load testing on critical applications.
   - Verify server backups and recovery processes.
   - Validate security configurations (firewalls, antivirus).
   - Test failover and redundancy systems.

5. Handover & Monitoring (5 Issues):
   - Train the operations team on server management.
   - Transition the project to production.
   - Monitor server performance for the first week.
   - Address any post-deployment issues.
   - Finalize project documentation and close the project.

Workflow Example

Statuses:
- Backlog → To Do → In Progress → In Review → Testing → Done
- Blocked: Used for issues that cannot progress due to external dependencies.

Automation Rule Recommendations

1. Auto-Assign Tasks Based on Labels
   - Trigger: Issue created.
   - Condition: Labels include "AD" or "DNS."
   - Action: Assign the issue to the relevant SME (Subject Matter Expert).
   - Example: If a task is labeled "DNS," assign it to the Network Administrator.

2. Notify Teams of Blocked Tasks
   - Trigger: Issue transitioned to "Blocked."
   - Action: Send an email or Slack notification to the project lead.
   - Example: "Task #25 is blocked due to missing hardware. Please review."

3. Transition Issues After Sub-Task Completion
   - Trigger: All sub-tasks are marked as "Done."
   - Condition: Parent issue is in "In Progress."
   - Action: Transition parent issue to "In Review."
   - Example: When sub-tasks for Group Policy configuration are done, move the main issue to "In Review."

4. Send Weekly Status Reports
   - Trigger: Scheduled (every Friday at 4 PM).
   - Condition: None.
   - Action: Send a summary of open tasks and completed tasks via email.
   - Example: "This week, 10 tasks were completed, and 5 remain in progress."

5. Automatically Move Issues to "Done"
   - Trigger: Issue status changes to "Testing."
   - Condition: Testing field is set to "Passed."
   - Action: Transition the issue to "Done."
   - Example: If a load testing task passes, mark it as "Done."

6. Auto-Create Sub-Tasks for Deployment
   - Trigger: Issue created (Type = Deployment).
   - Action: Create sub-tasks for installation, configuration, and documentation.
   - Example: Create sub-tasks for "Install Windows Server" and "Configure RAID."

7. Notify the Team of Overdue Issues
   - Trigger: Scheduled (daily at 8 AM).
   - Condition: Due date < today AND status != Done.
   - Action: Send reminders to assignees and the project lead.
   - Example: "The task Install WSUS is overdue. Please update."