

Triage Process

- [Role](#) on page 1
- [Stakeholders](#) on page 1
- [Partners](#) on page 1
- [JIRA Management \(Issue Tracking\)](#) on page 2
- [Ticket Types](#) on page 2
- [MCT process](#) on page 2
 - [Status: In Progress](#) on page 2
 - [Status: Waiting on Stakeholder](#) on page 3
 - [Status: Waiting on Partner](#) on page 4
 - [Status: Triage](#) on page 4
- [Prioritization Logic](#) on page 4
- [JIRA Scrub](#) on page 5

Role

The primary role of Monsoon Commerce Triage (MCT) is to serve as a centralized liaison between stakeholders. MCT accomplishes this by communicating the needs of various stakeholders through tickets and discussions.

MCT is a subject matter expert (SME) for product, market, and technical knowledge. As an SME, MCT works closely with stakeholders to perform root cause analysis on complicated issues and gather requirements for Product Management.

Stakeholders

- Software users
- Sales
- Marketing
- Account Management
- Client Services
- Product Management
- Program Management
- Pro Engineering
- Service Tier Engineering
- DevOps Engineering

Partners

- Abebooks
 - Alibris
 - Amazon
 - eBay
 - Play.com
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- Rakuten.com
- Endicia

JIRA Management (Issue Tracking)

Tickets for the following projects are initially filed in MCT:

- Product Management (MCPM)
- Pro (MCPRO)
- Service Tier (MST)
- DevOps (SUP)
- Information Development (MCID)

MCT tickets are managed in the [MCT Agile Board](#).

Ticket Types

Defect

A defect is an error, flaw, failure, or fault in a computer program or system that causes it to produce an incorrect or unexpected result or to behave in unintended ways.

An enhancement is any product change or upgrade that increases capabilities beyond original specifications.

Request

A request is an action item that needs to be completed such as a research task.

MCT process

Each ticket in the MCT queue follows a specific path and workflow.

Status: Batter

When you create an MCT ticket, JIRA automatically places the ticket in Batter status. While a ticket's in Batter status, it's managed as part of the Batter queue, a prioritized list of tickets that require action by MCT. The queue contains new tickets filed by stakeholders and existing tickets that have had additional requirements or information added by a stakeholder.

Status: In Progress

In Progress means that the ticket has been prioritized within a list of In Progress tickets and work on the issue has started.

- The Batter moves a ticket from Batter status to In Progress status to indicate that work on the issue has started. At that time, the Batter prioritizes the ticket within a list of In Progress tickets.

After a ticket's moved to In Progress, the Batter's next steps depend on the ticket type: Defect, Enhancement, or Request.

Ticket type: Defect

1. Review the ticket to ensure that the scope of the issue and the impact to the stakeholder is clear.
2. Perform a JIRA search to determine if this ticket is a duplicate of an existing ticket. If it is a duplicate:
 1. Link the ticket to the ticket it duplicates.
 2. Resolve the ticket with a Resolution of Duplicate.
3. Develop a workaround for the affected stakeholders and document it in the ticket.
4. Gather requirements necessary to do root cause analysis and document in the ticket.
5. Do root cause analysis on the issue and document it in the ticket.
6. Groom the ticket:
 1. Set Priority.
 2. Update Summary to clearly identify the issue.
 3. Verify that affected customers are documented. If not, add affected customers.
 - The customer should be formatted in lower case with their company name followed by their TXN Id with dashes replacing any spaces. (i.e. *mc-triage-1234*)
 4. Update Description to clearly define the issue.
 5. Add the Component.
 6. Add Affects Version.
 7. Add Version Introduced.
 8. Add Steps to Reproduce.
7. If the issue requires a code change, move the ticket to Triage status.
8. If the issue is resolved, Resolve the ticket with the appropriate Resolution: Fixed, Won't Fix, Cannot Reproduce, or Invalid.

Ticket type: Enhancement

1. Review the ticket to ensure that the requested change is clearly defined.
2. Search JIRA to determine if the ticket duplicates an existing ticket. If it does:
 1. Link the new ticket to the ticket it duplicates.
 2. Resolve the new ticket with a Resolution of Duplicate.
3. Gather requirements and groom the ticket for Product Management:
 1. Set Priority.
 2. Update Summary to clearly identify the issue.
 3. Verify that affected customers are documented. If not, add affected customers.
 - The customer should be formatted in lower case with their company name followed by their TXN Id with dashes replacing any spaces. (i.e. *mc-triage-1234*)
 4. Update Description to clearly define the issue.
 5. Verify that Expected Benefit is documented. If not, add Expected Benefit.
 6. Add the Component.
4. Move the issue to Triage status.

Ticket type: Request

1. Review.
2. Gather requirements.
3. Complete.
4. Close.

Status: Waiting on Stakeholder

Waiting on Stakeholder means that additional information is needed to resolve the ticket or to groom it for Engineering or Product Management. For example, a Defect ticket could be missing log files necessary to do root cause analysis or the Expected Benefit field might not be complete in an Enhancement ticket.

- MCT moves a ticket from In Progress status to Waiting on Stakeholder status to indicate that additional information is needed and assigns the ticket to the stakeholder who created the ticket. When requirements are gathered, the stakeholder changes the status of the ticket to Batter by clicking the Back to Batter button.

Status: Waiting on Partner

Waiting on Partner means that the Batter has requested information from a Partner or filed a ticket with a Partner. For example, a stakeholder may have questions on how the API functions or a Partner may have introduced a bug in their API that MCT is working with the Partner to resolve.

- MCT moves a ticket from In Progress status to Waiting on Stakeholder status and assigns the ticket to themselves. When requirements are gathered, MCT changes the status to Batter by clicking the Back to Batter button.

Status: Triage

Triage means that the ticket has been prioritized and is ready for review by the JIRA Scrub team for placement in the appropriate project.

- After a ticket has been moved to Triage status it's ready for review in the JIRA scrub.

Prioritization Logic

MCT reviews and sets the priority of tickets when moving a ticket to Triage status, focusing on prioritizing Defect tickets.

- Product Management typically sets the priority of Enhancement tickets so they can be given a more general priority.

MCT considers the following questions when setting a ticket's priority:

1. **How many users are affected?**

The greater the number of users affected by a ticket the higher the ticket's priority.

2. **What users are affected?**

A ticket may only affect one user, but the user could be one of our most successful. Tickets affecting these users should have higher priority.

3. **What's the impact to the user?**

If the ticket blocks a user from using the software or is causing them to lose money, the issue should be higher priority. If the ticket is "nice to have" and not really impacting the user, it should be lower priority.

4. **What's the impact to Monsoon Commerce?**

If the ticket is causing Monsoon Commerce to lose money or possibly the customer, it should be given a higher priority.

5. **How does the stakeholder feel?**

Ask the stakeholder! Make sure you understand the priority from the stakeholders point of view.

Triage Process

Priority values are:

- **Trivial:** Trivial tickets are "nice to have" tickets where there is little or no value to the users or the business in resolving the ticket. Trivial doesn't mean the ticket is trivial to resolve.
- **Minor:** This is the default priority. Minor tickets are tickets that should be considered for a future release.
- **Major:** Major tickets are tickets that impact the user(s) in a way where the issue should be fixed in the next few releases.
- **Critical:** Critical tickets are tickets that impact the user(s) in a way where the issue needs to be fixed in the next release.
- **Blocker:** Blocker tickets are tickets so impactful that a patch needs to be created off of the current version.
- **Mandatory:** Mandatory tickets are tickets where a Partner has or will be making a change that must be supported in order for the software to function. Mandatory tickets have a due date that determines which release the ticket will be included in.

JIRA Scrub

Every Wednesday at 12:00pm, MCT, a member from each project's team, Product Management, and a member of the Client Service's team meet to review tickets.

For tickets in Triage status, the goal is to make sure each team has all of the requirements to place the ticket into their backlog and understand the ticket's priority. *The review is about the problem and not about the solution.*

For tickets in Batter, In Progress, and Waiting on... status, the goal is to discuss the status of the ticket by reviewing new information and making decisions on the next steps.

If the ticket passes review, the Batter moves the ticket to the appropriate project.

- When the ticket is moved from MCT to another project's backlog, it is assigned an epic for tracking purposes.

If the ticket needs more information, the Batter changes the ticket's status to Batter by clicking the Back to Batter button with a comment on what is missing.