

# IMPLEMENTING CUSTOM JIRA WORKFLOW FOR QUALITY ASSURANCE

## OVERVIEW

A custom Jira workflow based on the Eight Disciplines (8D) methodology was successfully implemented for a new Quality Assurance (QA) team, replacing spreadsheets, improving efficiency, enabling real-time reporting, and saving costs.

## PROBLEM STATEMENT

A newly formed QA team lacked a dedicated system to track and manage QA-related activities. The team, which had grown to over 30 members, was relying on Excel spreadsheets, making it difficult to maintain consistent processes, track nonconformance, and quality-related issues.

## PROPOSED SOLUTION

Using my knowledge and prior experience with Jira, I proposed creating a custom workflow tailored to the team's needs using the 8D methodology of problem solving. The implementation process included:

1. **Collaborative Planning:** Partnered with the company's Jira Administrator and two QA engineers to gather requirements and identify how the team could leverage 8D with a Jira workflow.
2. **Workflow Design:** I sketched a developed a step-by-step custom workflow in Jira with statuses, transitions, and custom fields that aligned with 8D.
3. **Access Controls & Automation:** Established role-based permissions for transitions and built automations to notify assignees, enforce field completion, and support users with reminders.
4. **Testing and Feedback Loop:** Ran a pilot with QA engineers and the QA manager to test the workflow and incorporated iterative feedback for improvement.
5. **Documentation & Training:** Created end-user guides, technical documentation for administrators, and held training sessions for the QA team.
6. **Launch & Optimization:** After management approval, I pushed the project to production with appropriate permissions, published resources to the knowledge base, and introduced dashboards and automated reporting features.

## RESULTS

The initiative was successfully developed and rolled out over a 3-6 month period. Outcomes included:

- **Cost Savings:** Eliminated the need for a paid TIPQA service.
- **Improved Efficiency:** Replaced spreadsheets with a dynamic, centralized Jira workflow that supports real-time collaboration.
- **Enhanced Visibility:** Created dashboards and ad-hoc reporting features that helped managers save time and simplified report requests.
- **Team Empowerment:** QA team members could now easily track progress, escalate issues, and contribute to continuous improvement using a structured, familiar system.
- **Recognition:** I received an internal Bravo Award for innovation, development, and impact.