Note: This is a fictional process document. It contains a general process overview for a fictional QA team as well as more detailed information on how to use Jira within that process. All names and email addresses are fictitious. Screenshots are from a fictitious Jira project. External links to other QA documents are for illustration purposes only and do not work; internal links that lead to other sections in this document or external links to Jira's web interface do work.

FY25 QA process: Using Jira for tasks

This document outlines how to use Jira to track QA tasks, and is part of the new QA process for FY25 (fiscal year 2025). Reach out to QA team lead Quyen Anderson (qanderson@qateam.com) with questions or for clarification.

What is Jira and why do we use it?

Jira is a project management tool. The QA team will be using it to create, describe, track, and assign tasks completed as part of its standard QA review process. For more detailed guidance on the new FY25 QA process, refer to the FY25 QA end-to-end process document.

Note: Jira uses the term **issue** to describe tasks. This document will use the term **task** except when describing UI labels.

An overview of the FY25 QA process

1. **The primary QA editor assigned to the project** will populate all Kanban boards associated with it.
   a. The **Intake tasks (primary QA)** and **Post-QA tasks** boards will always contain the same tasks, but the **Pre-QA tasks** and **QA tasks** boards may vary from project to project.
2. The primary QA editor will complete all tasks on the **Intake tasks (primary QA)** board.
   a. If needed, the primary QA editor can delegate some tasks on this board to other editors.
3. All QA editors associated with the project will assign tasks on the **Pre-QA tasks**, **QA tasks**, and **Post-QA tasks** boards to themselves.
4. All editors associated with the project will move assigned tasks to the **Completed** board upon finishing.

Using Kanban boards in Jira

Each course uses a series of Kanban boards to track tasks. The template contains the following boards:

- **Intake tasks (primary QA)**
  o These tasks remain the same from project to project.
  o The primary QA editor assigned to the course should complete these.
  o The primary QA editor should also populate the other Kanban boards with tasks.
- **Pre-QA tasks**
  o Pre-QA tasks may not be needed, depending on the project. These are tasks that are completed before the official start of QA.

- **QA tasks**
  - These tasks may vary, depending on the project.
- **Post-QA tasks**
  - These tasks remain the same from project to project.
- **Completed**
  - Any QA editor may move an assigned task to this board.

Using Jira to track tasks for a single course

Use the guidance in this section to learn how to access a project and create, describe, assign, and move tasks associated with a project in Jira.
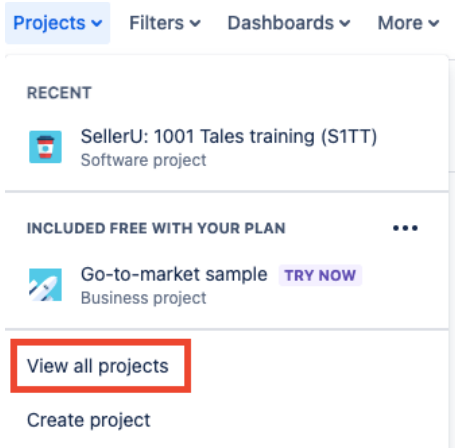
Accessing a project in Jira

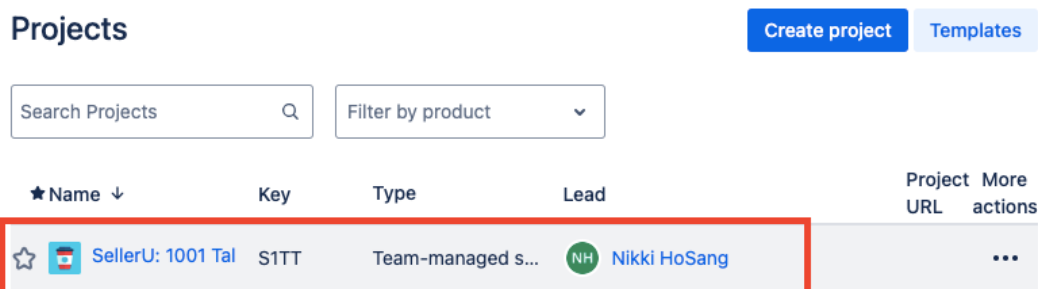To access a project in Jira, follow these steps:

1. In Jira, select the **Projects dropdown** from the **navigation menu**.

2. Select **View all projects**.

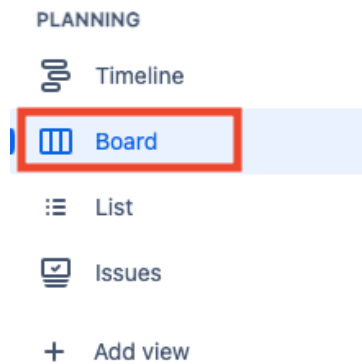3. Select **your project** from the list.

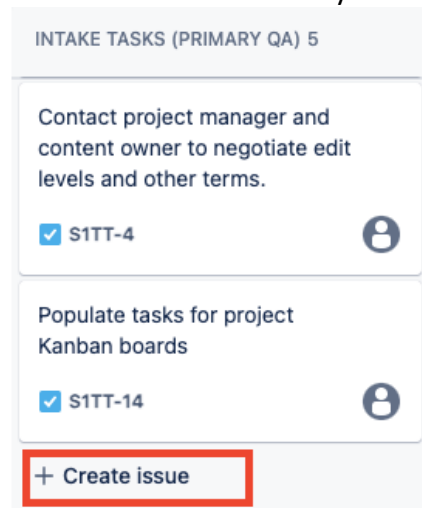A series of Kanban boards associated with your project will appear.

Creating a new task in Jira

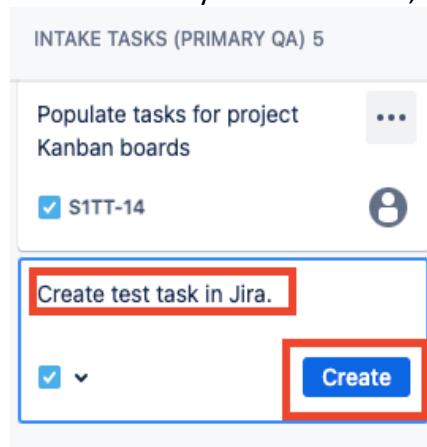To create a new task in Jira, follow these steps:

1. Select a project, following the guidance in Accessing a project in Jira.
2. From the **Planning** navigation panel, select **Board**.

3. Select the Kanban board you wish to update, then select **+ Create issue.**

4. Enter the task you need to add, then select **Create**.

Describing a task in Jira

To describe a task in Jira, follow these guidelines:

- Tasks should be discrete units. If a task can be broken down into two or more sub-tasks, enter each task separately.
  - For example, "Conduct global readiness review" can be broken down into two sub-tasks: "Conduct global readiness testing on export of course" and "QA all images for global readiness."
- Clearly and concisely describe the task. If necessary, include whether the task is a first or second pass. Include scoping information, such as page count or number of documents, if available.
  - For example, use "First pass: QA simulation text and behavior/functionality" rather than "Test simulations."
  - For example, use "QA 14 transcripts (42 pages) and video CC" rather than "QA transcripts and video CC."
    - You may still need to enter extra details in the Description box for this task.
- If needed, enter extra information such as rationale and scoping information such as video length and page count in the Description box for your task.

Assigning a task in Jira

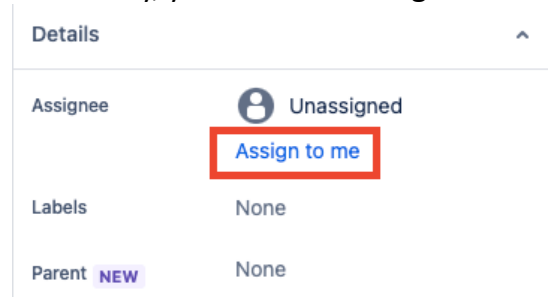To assign a task to yourself or someone else in Jira, follow these steps:

1. Select a task. The task details will open in a new window.
2. Locate and expand the **Details** dropdown.
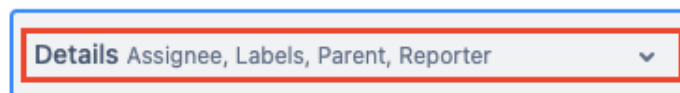
3. Next to Assignee, select **Unassigned**. A blank field will appear. Then, enter the name of the person you wish to assign to the task.

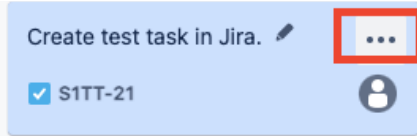   a. Alternately, you can select **Assign to me** to assign a task to yourself.

Moving tasks in Jira

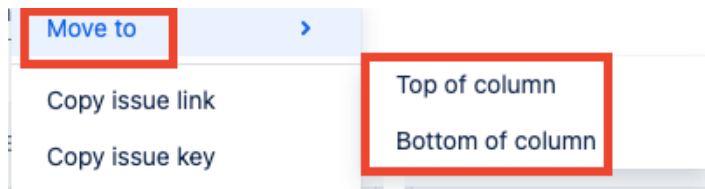You can move tasks within individual Kanban boards or from one Kanban board to another.

Moving tasks within an individual Kanban board

To move a task within an individual Kanban board, follow these steps:

1. Locate the task you wish to move.
2. Select the **ellipses icon** (…).

3. Hover over **Move to**, then select one of the following options:
    a. Top of column
    b. Bottom of column

Note: Depending on the location of the task you wish to move, you may only be given one of the two options. For example, if your task is at the bottom of the Kanban board, you will only be given the option to select **Top of column**.

Moving tasks to different Kanban boards

To move a task to a different Kanban board, follow these steps:

1. Select the task you wish to move.
2. Select the named dropdown for your board. For example, **Intake tasks (primary QA)**.

3. Select the board you wish to move to the task to.