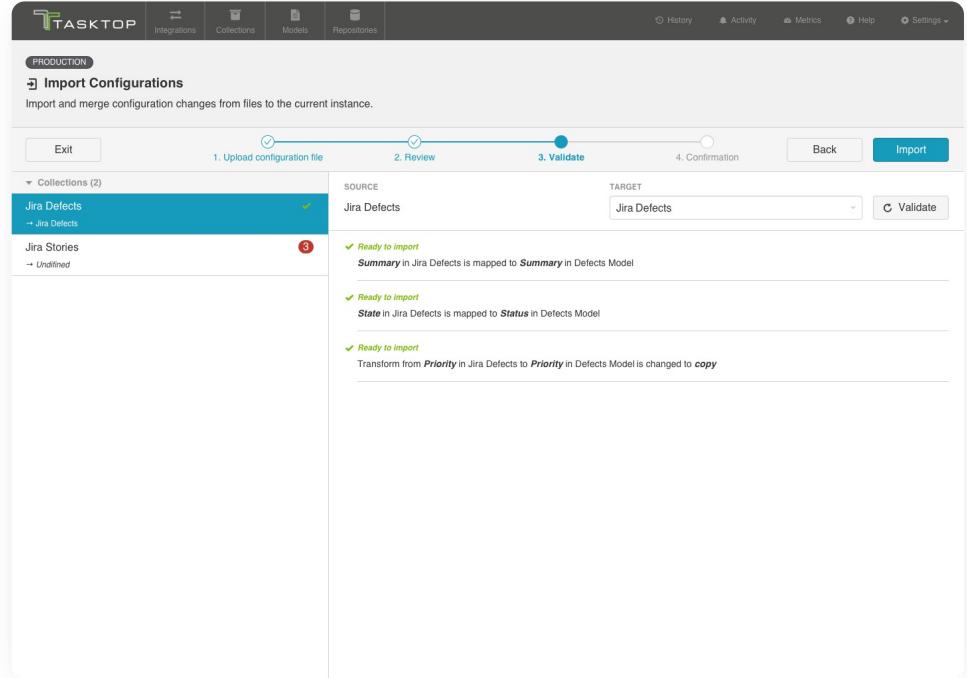


Portability of configurations

This feature allows customers to track the changes they make in one instance of the product and transfer the changes to another instance without too much manual work.



TEAM

1 product designer
1 product manager
4 engineers



MY ROLE

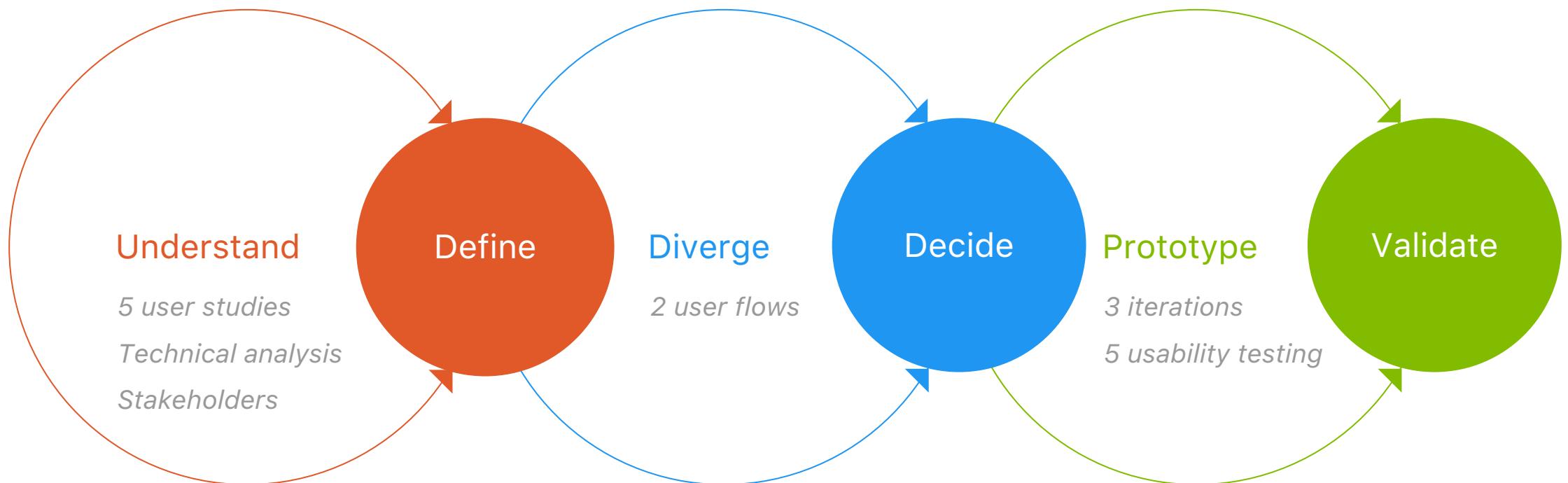
User Research
Product Design

Introducing Background

When customers make changes and validate them in a test or development environment, they must manually make the same changes in production.

BUSINESS REQUIREMENT
\$ Deal Breaking Feature

Overall Process

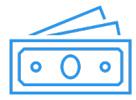


Conducting 5 User Studies



Automotive Industry

6+ Instances, 45+ Integrations



Finance Company

2 Instances, 10+ Integrations



Insurance Company

2 Instances, 15 Integrations



Consulting firm

6+ Instances, 10-15 Integrations



Automotive Industry

10+ Instances, 8+ Integrations

Conducting **5 User Studies**

Ask customers to walk through their journey:

- When they need to make and replicate the changes
- What changes they need to make
- How often they would make changes
- How they replicate changes today

	A	B	C	D	E	F	G
1	Configurations	Difficulty to migrate	Frequency to Change				
2	Entire Hub						
3	Clone one entire hub	▼	Rarely	▼ Rarely	▼ Rarely	▼ Rarely	▼ Rarely
4	Repository						
5	New Repository Connection	▼	Rarely	▼ Rarely	▼ Rarely	▼ Rarely	▼ Rarely
6	Edit Repository Settings	▼	Rarely	▼ Rarely	▼ Rarely	▼ Rarely	▼ Rarely
7	Model						
8	New Model	▼	Often	▼ Often	▼ Often	▼ Often	▼ Often
9	Add Fields	▼	Often	▼ Often	▼ Often	▼ Often	▼ Sometimes
10	Edit Fields	▼	Often	▼ Often	▼ Rarely	▼ Rarely	▼ Rarely
11	Add Values to Field	▼	Often	▼ Often	▼ Often	▼ Sometimes	▼ Sometimes
12	Edit Value of a Field	▼	Often	▼ Often	▼ Rarely	▼ Rarely	▼ Rarely
13	Delete Model	▼	Rarely	▼ Unknown	▼ Unknown	▼ Unknown	▼ Never
14	Collection						
15	New Collection	▼	Often	▼ Often	▼ Sometimes	▼ Sometimes	▼ Often
16	Add Projects to Collection	▼	Rarely	▼ Often	▼ Rarely	▼ Sometimes	▼ Often
17	Edit Projects to Collection	▼	Rarely	▼ Rarely	▼ Rarely	▼ Rarely	▼ Rarely
18	Change Model	▼	Rarely	▼ Rarely	▼ Unknown	▼ Unknown	▼ Unknown
19	Edit Field Mapping	▼	Often	▼ Often	▼ Often	▼ Sometimes	▼ Rarely
20	Edit Transform	▼	Sometimes	▼ Sometimes	▼ Sometimes	▼ Sometimes	▼ Rarely
21	Edit Value Mapping	▼	Often	▼ Often	▼ Often	▼ Sometimes	▼ Sometimes
22	Edit Relationship Mapping	▼	Sometimes	▼ Rarely	▼ Rarely	▼ Sometimes	▼ Never
23	Edit Person Mapping	▼	Often	▼ Rarely	▼ Sometimes	▼ Rarely	▼ Rarely

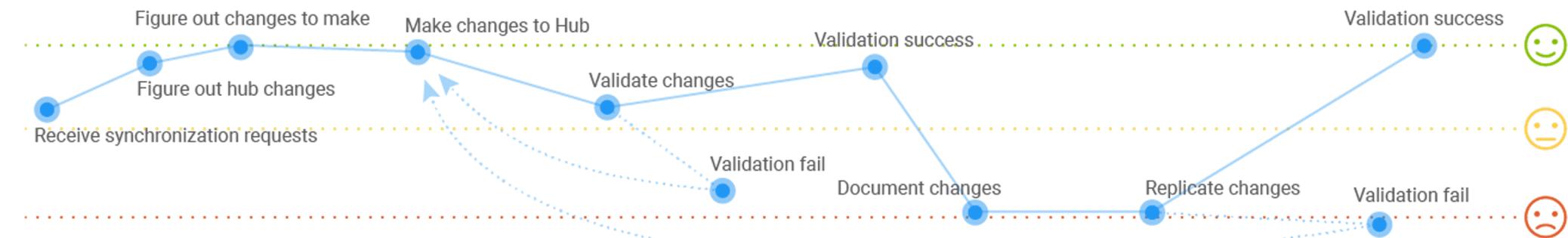
PHASES

Receive Requests

Make and Document Changes

Replicate Changes

CUSTOMER ACTIONS



TOUCHED PLATFORMS

- IT Ticket Management System
- Email
- Tasktop Hub (Test)
- Paper & Pencil
- Online document / Git

- Tasktop Hub (Production)

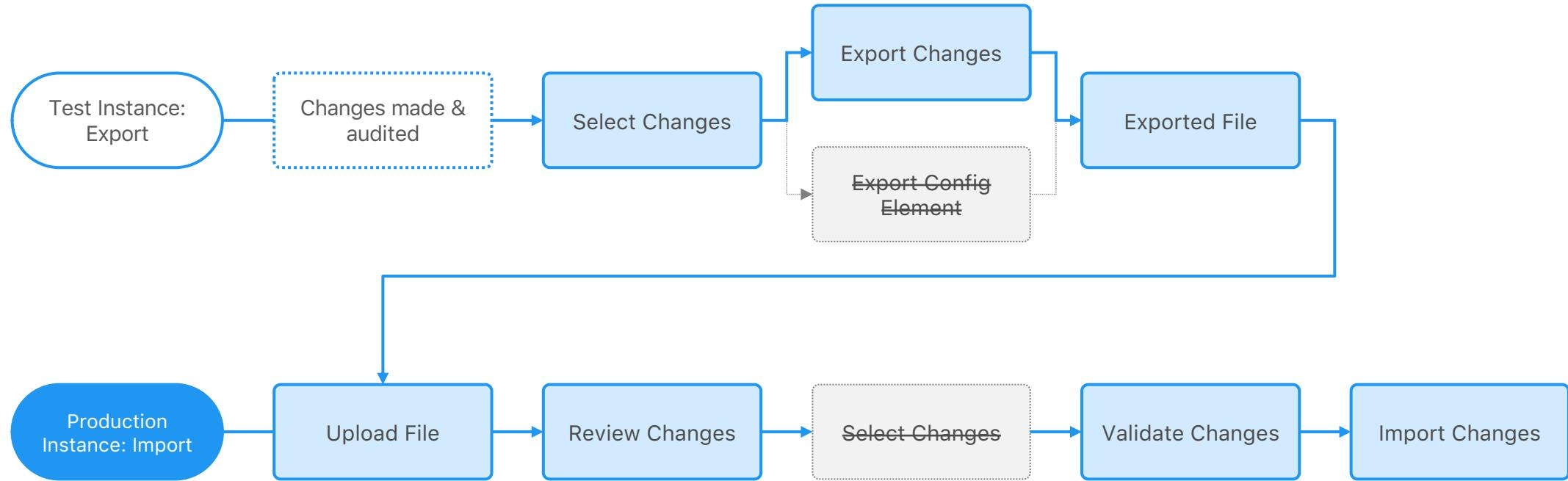
CUSTOMER PAIN POINTS

- | | | |
|-----|---|--|
| N/A | <ul style="list-style-type: none"> • Team spends hours manually tracking changes | <ul style="list-style-type: none"> • Waste of time performing manual updates • Waste of resources and money • Error Prone due to manual process |
|-----|---|--|

PROPOSED SOLUTIONS

- | | | |
|-----|---|--|
| N/A | <ul style="list-style-type: none"> • User activity audit • Export changes | <ul style="list-style-type: none"> • Import and merge changes • Validation before applying changes |
|-----|---|--|

Proposing User Flow



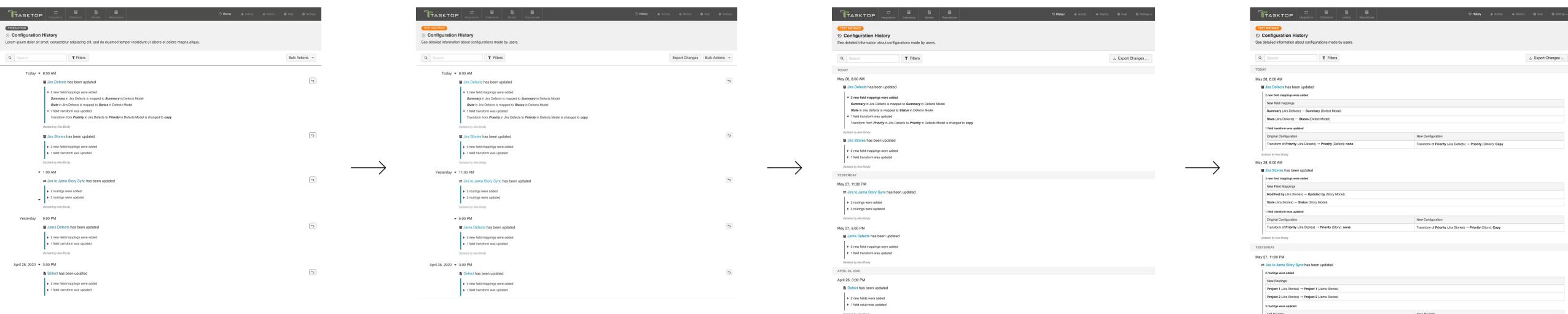
Iterating Prototype

5 USABILITY TESTING

3 Internal Users
2 Customers

Link to the Prototype

Prototype



Today ▾ 8:00 AM

Jira Defects has been updated

- 2 new field mappings were added
 - Summary in Jira Defects is mapped to **Summary** in Defects Model
 - State in Jira Defects is mapped to **Status** in Defects Model
- 1 field transform was updated
 - Transform from **Priority** in Jira Defects to **Priority** in Defects Model is changed to **copy**

Updated by Alex Brady

Jira Stories has been updated

- 2 new field mappings were added
- 1 field transform was updated

Updated by Alex Brady



TODAY

May 28, 8:00 AM

Jira Defects has been updated

- 2 new field mappings were added
 - Summary in Jira Defects is mapped to **Summary** in Defects Model
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Updated by Alex Brady

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TODAY

May 28, 8:00 AM

Jira Defects has been updated

- 2 new field mappings were added

New field mappings
Summary (Jira Defects) — Summary (Defect Model)
State (Jira Defects) — Status (Defect Model)
- 1 field transform was updated

Original Configuration	New Configuration
Transform of Priority (Jira Defects) → Priority (Defect): none	Transform of Priority (Jira Defects) → Priority (Defect): Copy

Updated by Alex Brady

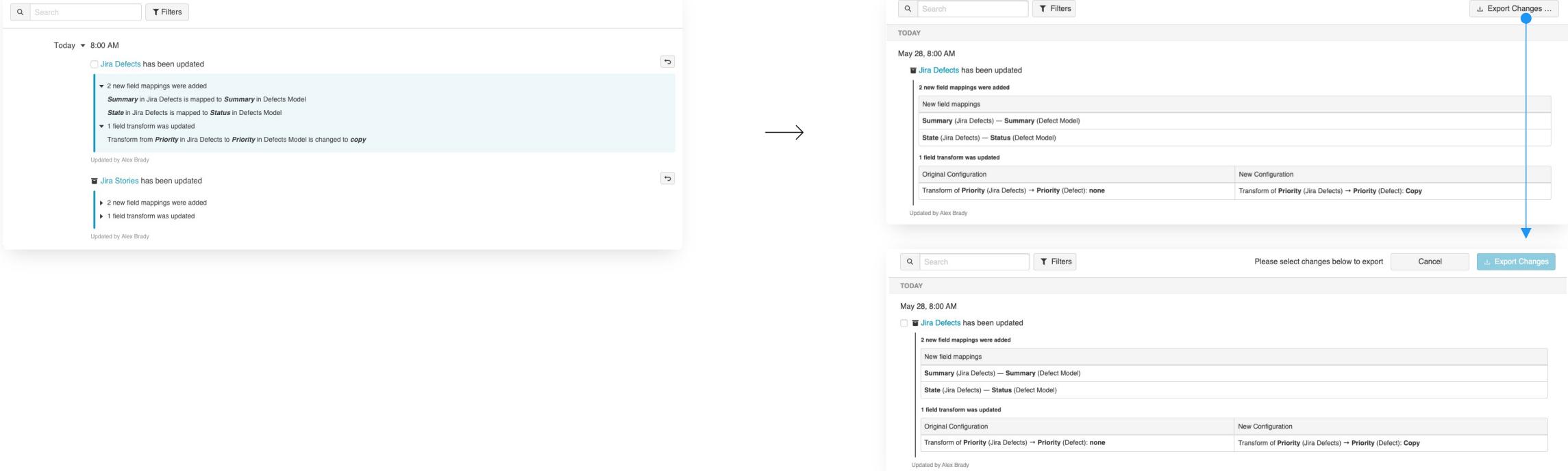
May 28, 6:00 AM

Design Iterations

History Screen

Over complicated expand and collapse, summary could be more clear

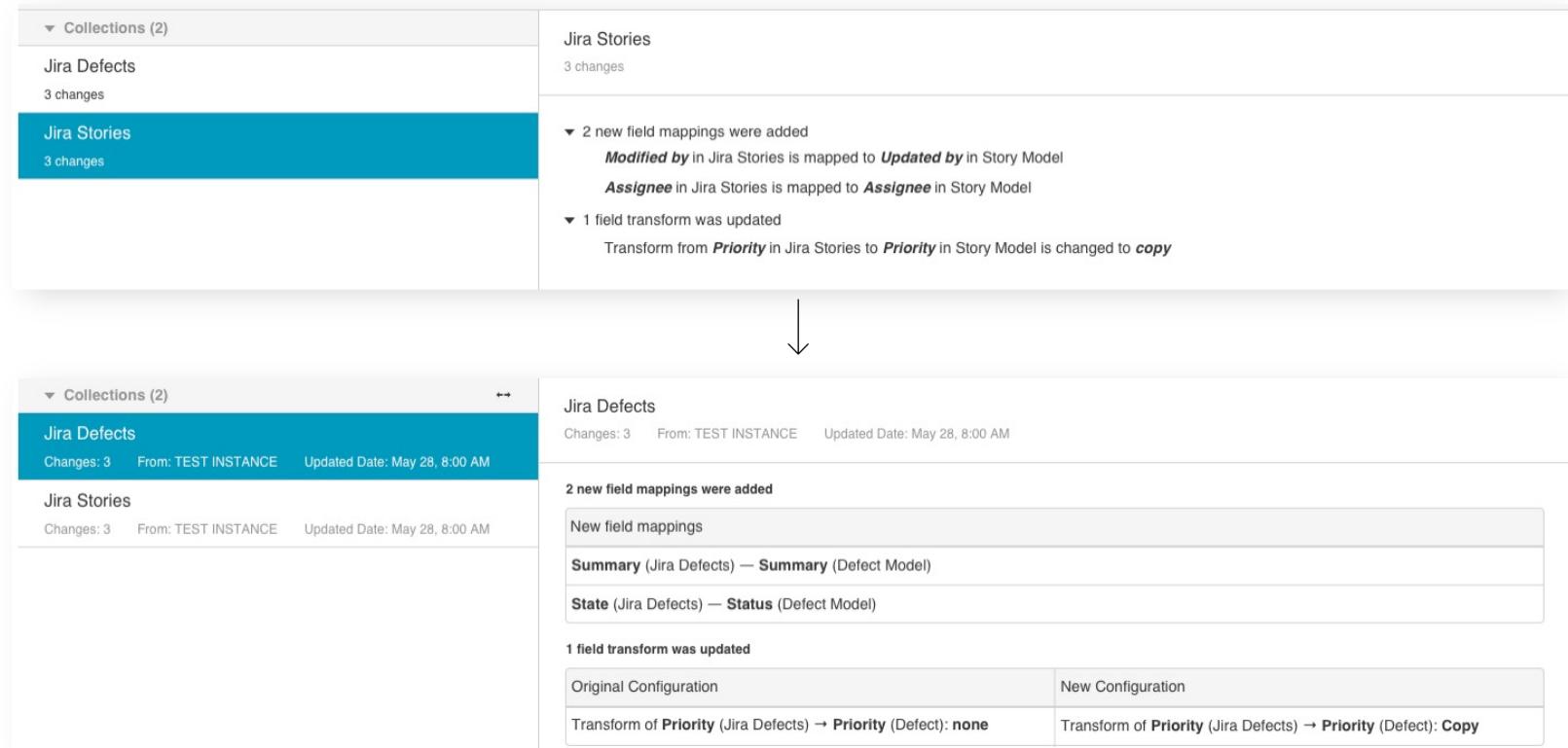
Solution: reduce number of collapses and reorganize date information.



Design Iterations History Screen

It is not clear that users can select and export changes

Solution: add an action button to trigger the selection for export



Collections (2)

Jira Defects	3 changes
Jira Stories	3 changes

Jira Stories

3 changes

▼ 2 new field mappings were added

Modified by in Jira Stories is mapped to *Updated by* in Story Model
Assignee in Jira Stories is mapped to *Assignee* in Story Model

▼ 1 field transform was updated

Transform from **Priority** in Jira Stories to **Priority** in Story Model is changed to **copy**

↓

Collections (2)

Jira Defects	Changes: 3 From: TEST INSTANCE Updated Date: May 28, 8:00 AM
Jira Stories	Changes: 3 From: TEST INSTANCE Updated Date: May 28, 8:00 AM

Jira Defects

Changes: 3 From: TEST INSTANCE Updated Date: May 28, 8:00 AM

2 new field mappings were added

New field mappings

Summary (Jira Defects) — **Summary** (Defect Model)

State (Jira Defects) — **Status** (Defect Model)

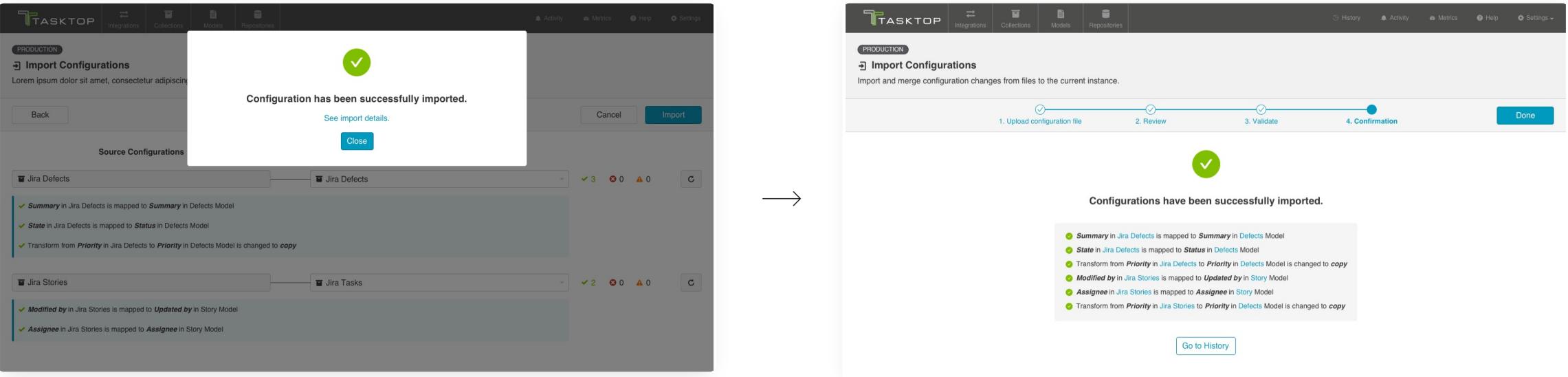
1 field transform was updated

Original Configuration	New Configuration
Transform of Priority (Jira Defects) → Priority (Defect): none	Transform of Priority (Jira Defects) → Priority (Defect): Copy

Design Iterations Import Screen

More metadata information should be included in the exported file

Solution: includes metadata like instance name, last updated date and number of changes



Design Iterations Import Screen

Instead of a confirm dialog with limited information, would rather an extra step for summary

Solution: in the wizard, add a confirmation step to summarize what has been imported successfully.

TEST INSTANCE

Configuration History

See detailed information about configurations made by users.

Search Export Changes ...

TODAY

May 28, 8:00 AM

Jira Defects has been updated

- 2 new field mappings were added
- New field mappings
- Summary (Jira Defects) — Summary (Defect Model)
- Status (Jira Defects) — Status (Defect Model)
- 1 field transform was updated
- Original Configuration New Configuration
- Transform of Priority (Jira Defects) → Priority (Defect): none Transform of Priority (Jira Defects) → Priority (Defect): Copy

Updated by Alex Brady

May 28, 6:00 AM

Jira Stories has been updated

- 2 new field mappings were added
- New Field Mappings
- Modified by (Jira Stories) — Updated by (Story Model)
- Status (Jira Stories) — Status (Story Model)
- 1 field transform was updated
- Original Configuration New Configuration
- Transform of Priority (Jira Stories) → Priority (Story): none Transform of Priority (Jira Stories) → Priority (Story): Copy

Updated by Alex Brady

YESTERDAY

May 27, 11:00 PM

Jira to Jama Story Sync has been updated

- 2 routings were added
- New Routings
- Project 1 (Jira Stories) → Project 1 (Jama Stories)
- Project 2 (Jira Stories) → Project 2 (Jama Stories)
- 3 routings were updated
- Old Routing New Routing

PRODUCTION

Import Configurations

Import and merge configuration changes from files to the current instance.

Exit 1. Upload configuration file 2. Review 3. Validate 4. Confirmation Back Import

Collections (2)

SOURCE

Jira Defects → Jira Defects ✓

Jira Stories → Undefined ③

TARGET

Jira Defects

✓ Ready to import
Summary in Jira Defects is mapped to Summary in Defects Model

✓ Ready to import
State in Jira Defects is mapped to Status in Defects Model

✓ Ready to import
Transform from Priority in Jira Defects to Priority in Defects Model is changed to copy

The Results Releases

The feature got released in two parts:

1. History: auditing configuration changes made by users (*released*)
2. Import: allow users to export and import changes from one to the other instance (*releasing soon*)

Summarizing **Key Take-aways**

Don't let perfect be the enemy of good.

Instead of spending a lot of time tackling the technical difficulties, use alternative solution to solve it for customers, even if it is not perfect