Reporting in Software Houses

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Agenda

- Weekly Status Report
- Project Time sheet
- Release Notes
- Deployment Guide
- User Manual
- Service Request/Incident/Change Request

Weekly Status Report

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Weekly Status Reports (WSR)

- You need to create regular status reports to update **stakeholders on project progress**.
- WSR captures all of the **business-critical activities**, **developments**, and **risks** associated with a project.
- Gives a thorough view of how the project is progressing. The report tracks the budget, indicates milestones, enumerates risks, etc.
- Status report is developed according to **time frame and audience**: team members and managers usually receive weekly reports that include more details, while higher-level executives get just the highlights on a less frequent basis.

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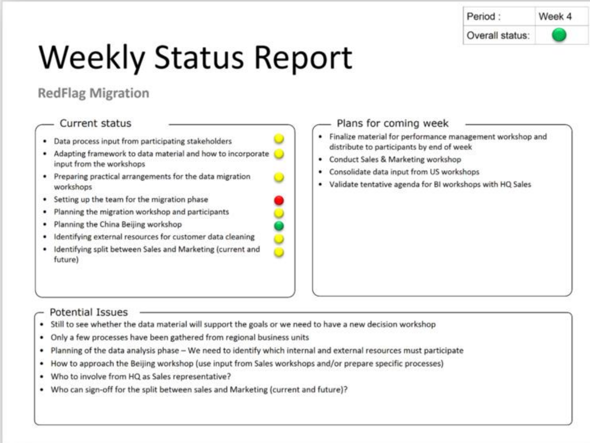
WSR Benefits

- Help identify issues and risks, so course correction can happen quickly
- Pinpoint the progress of the work done by individuals, teams, and resources, so you can rotate out and bring in staff in a timely manner
- Prevent unpleasant surprises (to team members, clients and stakeholders)
- Keep project members and leaders accountable
- Provide a paper trail



Period :	Week 4
Overall status:	

Weekly Status Report

RedFlag Migration

Current status

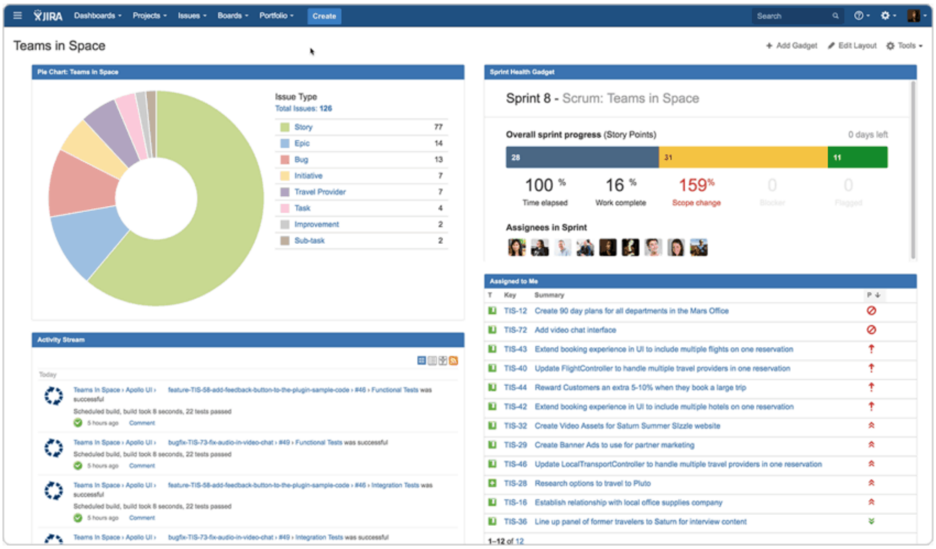
- Data process input from participating stakeholders
- Adapting framework to data material and how to incorporate input from the workshops
- Preparing practical arrangements for the data migration workshops
- Setting up the team for the migration phase
- Planning the migration workshop and participants
- Planning the China Beijing workshop
- Identifying external resources for customer data cleaning
- Identifying split between Sales and Marketing (current and future)

Plans for coming week

- Finalize material for performance management workshop and distribute to participants by end of week
- Conduct Sales & Marketing workshop
- Consolidate data input from US workshops
- Validate tentative agenda for BI workshops with HQ Sales

Potential Issues

- Still to see whether the data material will support the goals or we need to have a new decision workshop
- Only a few processes have been gathered from regional business units
- Planning of the data analysis phase – We need to identify which internal and external resources must participate
- How to approach the Beijing workshop (use input from Sales workshops and/or prepare specific processes)
- Who to involve from HQ as Sales representative?
- Who can sign-off for the split between sales and Marketing (current and future)?


JIRA
Dashboards
Projects
Issues
Boards
Portfolio
Create
Search
Teams in Space
Add Gadget
Edit Layout
Tools
Pie Chart: Teams in Space
Issue Type
Total Issues: 126
Story 77
Epic 14
Bug 13
Initiative 7
Travel Provider 7
Task 4
Improvement 2
Sub-task 2
Sprint Health Gadget
Sprint 8 - Scrum: Teams in Space
Overall sprint progress (Story Points)
0 days left
28
31
11
100 % Time elapsed
16 % Work complete
159% Scope change
Assignees in Sprint
Activity Stream
Today
Teams in Space › Apollo UI › feature-TIS-58-add-feedback-button-to-the-plugin-sample-code › #46 › Functional Tests was successful
Scheduled build, build took 8 seconds, 22 tests passed
5 hours ago Comment
Teams in Space › Apollo UI › bugfix-TIS-73-fix-audio-in-video-chat › #49 › Functional Tests was successful
Scheduled build, build took 8 seconds, 22 tests passed
5 hours ago Comment
Teams in Space › Apollo UI › feature-TIS-58-add-feedback-button-to-the-plugin-sample-code › #46 › Integration Tests was successful
Scheduled build, build took 8 seconds, 22 tests passed
5 hours ago Comment
Teams in Space › Apollo UI › bugfix-TIS-73-fix-audio-in-video-chat › #49 › Integration Tests was successful
Assigned to Me
T Key Summary P
TIS-12 Create 90 day plans for all departments in the Mars Office
TIS-72 Add video chat interface
TIS-43 Extend booking experience in UI to include multiple flights on one reservation
TIS-40 Update FlightController to handle multiple travel providers in one reservation
TIS-44 Reward Customers an extra 5-10% when they book a large trip
TIS-42 Extend booking experience in UI to include multiple hotels on one reservation
TIS-32 Create Video Assets for Saturn Summer Sizzle website
TIS-29 Create Banner Ads to use for partner marketing
TIS-46 Update LocalTransportController to handle multiple travel providers in one reservation
TIS-28 Research options to travel to Pluto
TIS-16 Establish relationship with local office supplies company
TIS-36 Line up panel of former travelers to Saturn for interview content
1–12 of 12

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Project Time Sheet

Project Time Sheet

- **Time tracking** is simply recording what hours you and your team members spend doing project work. The main tool for time tracking is the time sheet.
- Unless you know how long a task has taken, and can compare that to how long it was scheduled to take, then understanding the **performance** of your project is much harder.
- Should be **recorded daily**. If you postpone it to the end of week for example, you will not be able to remember the exact tasks and meetings.
- If you want to bill in units of time, you need to record **billable hours**.

Project Time Sheets Benefits

- **To build a database of historical information about how long tasks take**

Many of those tasks will happen again in the future. This will let you estimate better in the future because you can draw from real-life data.

- **For billing clients**

Of high importance in case of customized products, when your invoices are queried by the customer and when work takes longer than planned because of changes the client requested.

- **To manage your workload**

Timesheets can be really helpful in pointing out why you aren't as efficient as you think you should be. This helps you manage your workload more efficiently both during a single day and over a longer period of time.

[Company Name] - Weekly Timesheet Template

1234 Sesame St., San Francisco, CA 94129
(123) 456-7890
email@acmeincdomain.com

Weekly Timesheet for MM/DD/YYYY - MM/DD/YYYY

	Monday		Tuesday		Wednesday		Thursday		Friday		
Employee Name	Tasks	Hours	Tasks	Hours	Tasks	Hours	Tasks	Hours	Tasks	Hours	TOTAL
											0.00
											0.00
											0.00
											0.00
											0.00
											0.00
											0.00
											0.00

Manager signature: Date:

ClickTime
Free use content provided by ClickTime
For more time tracking resources, features and information, visit www.clicktime.com

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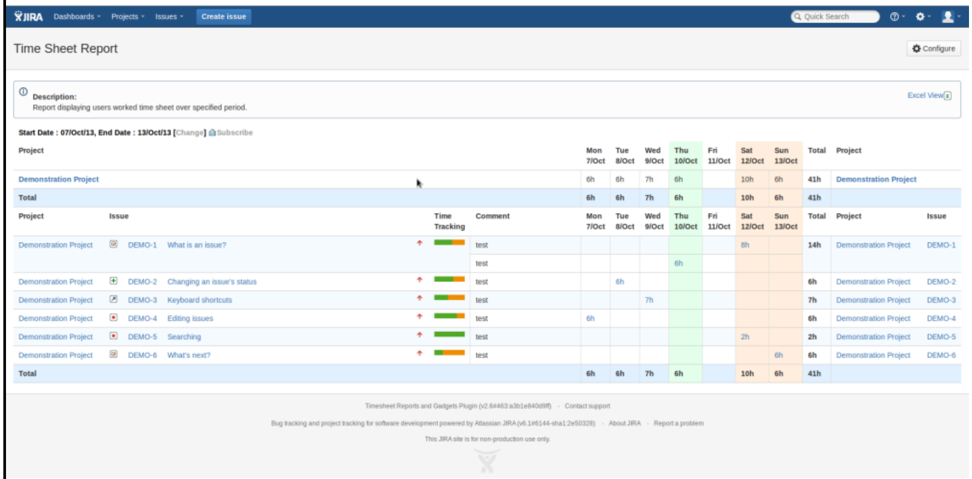

JIRA Dashboards Projects Issues Create issue Quick Search

Time Sheet Report

Configure

Description:
Report displaying users worked time sheet over specified period.

Excel View

Start Date : 07/Oct/13, End Date : 13/Oct/13 [Change] Subscribe

Project	Mon 7/Oct	Tue 8/Oct	Wed 9/Oct	Thu 10/Oct	Fri 11/Oct	Sat 12/Oct	Sun 13/Oct	Total	Project
Demonstration Project	6h	6h	7h	6h		10h	6h	41h	Demonstration Project
Total	6h	6h	7h	6h		10h	6h	41h	

Project	Issue		Time Tracking	Comment	Mon 7/Oct	Tue 8/Oct	Wed 9/Oct	Thu 10/Oct	Fri 11/Oct	Sat 12/Oct	Sun 13/Oct	Total	Project	Issue
Demonstration Project	DEMO-1	What is an issue?		test						8h		14h	Demonstration Project	DEMO-1
				test				6h						
Demonstration Project	DEMO-2	Changing an issue's status		test		6h						6h	Demonstration Project	DEMO-2
Demonstration Project	DEMO-3	Keyboard shortcuts		test			7h					7h	Demonstration Project	DEMO-3
Demonstration Project	DEMO-4	Editing issues		test	6h							6h	Demonstration Project	DEMO-4
Demonstration Project	DEMO-5	Searching		test						2h		2h	Demonstration Project	DEMO-5
Demonstration Project	DEMO-6	What's next?		test							6h	6h	Demonstration Project	DEMO-6
Total					6h	6h	7h	6h		10h	6h	41h		

Timesheet Reports and Gadgets Plugin (v2.6#463:a3b1e840d9ff) · Contact support

Bug tracking and project tracking for software development powered by Atlassian JIRA (v6.1#6144-sha1:2e50328) · About JIRA · Report a problem

This JIRA site is for non-production use only.

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Release Notes

Release Notes

- **Release Notes** are documents that are distributed with **every version of the product**.
- Whenever a new software version is released, a release note is generated to provide the necessary information about **recent changes, enhancements, bug fixes, new features, workarounds and known issues**.
- For products that have already been in use, the release note is delivered to the customer when **every update is released**.

- In many cases, two release notes are required:
  - **Private** (Internal) release note provided for the company's own use.
  - **Public** release note provided for customers and end users
- Release notes **are not substitute for user manuals**.
- Release notes provide information that is clear, correct, and complete.
- For some businesses, release notes are the only way product enhancements are communicated to customers.

- There is **no standard format** for release notes followed throughout different organizations.
- Often written by the development team/technical writers.
- The **content of release notes** vary according to the release type.

  For products that are at testing stage and that are newly released, the content is usually more descriptive compared to release notes for bug fixes and feature enhancements, which are usually brief.

Release Note Sections

- **Header** – Document Name, product name, release number, release date, note date, note version.
- **Overview** - A brief overview of the product and changes.
- **Purpose** - A brief overview of the purpose of the release note with a listing of what is new in release, including bug fixes and new features.
- **Issue Summary** - A short description of the bug or the enhancement in the release.
- **Steps to Reproduce** - The steps that were followed when bug was encountered.
- **Resolution** - A short description of the modification/enhancement that was made to fix the bug.
- **End-User Impact** - What different actions are needed by the end-users of the application. This should include whether other functionality is impacted by these changes.
- **Support Impacts** - Changes required in the daily process of administering the software.
- **Notes** - Notes about software or hardware installation, upgrades and product documentation (including documentation updates)
- **Disclaimers** - Company and standard product related messages. e.g.; freeware, anti-piracy, duplication etc..
- **Contact** - Support contact information.

Deployment Guide

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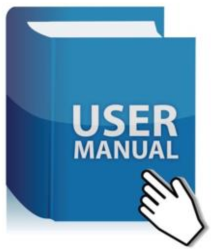
DEPLOYMENT

- **Software deployment** is all of the activities that make a software system available for use. It occurs at producer side or at the consumer side or both.
- The **Deployment Guide** provides relevant information regarding the deployment, configuration and administration of system.
- The **Deployment Guide** must be tested to ensure it is technically correct and can be used to install and deploy the software or system in the target environment, resulting in a working and usable system.
- Often written by development team/technical writer.

Deployment Guide Elements

- Introduction
- Hardware and Software Configuration
- Installation/Deployment Software
- Licensing
- Performance Tuning Tips
- Technical Support
- Additional Resources

User Manual



User Manual/Guide

- A **user guide**, commonly known as a **manual**, is a technical communication document intended to give assistance to people using a particular system.
- It explains **how to use** a software application in language that a **non-technical** person can understand.
- Contain both a written guide and the associated **images**. It is usual to include screenshots of the human-machine interface(s), and hardware manuals often include clear, simplified diagrams.
- The language used is matched to the intended audience, with **jargon kept to a minimum** or explained thoroughly.
- Often written by the technical writers with help from the business team.

Identify the Audience

- Who are your users?
- Are there different groups of users?
- Will different groups of users perform different tasks?
- What level of technical expertise do users have?
- How much time will they invest reading the user guide?
- What tasks are users typically going to perform with the software?

Content

1. **Preface**
   - Use this section to reference other documents related to the software.
   - If needed include a “How to use this guide” section
2. **Table of contents**
3. **Body/Procedures**
4. **Reference Materials**
   - Error messages that may arise when you use the application.
   - Troubleshooting tips to resolve these issues.
   - Frequently asked questions.
5. **Glossary**: All acronyms and terms in document.
6. **Index**: Locate specific items very fast without having to search through the entire document manually.

Preface
Use this section to reference other documents related to the software. Make sure you refer to the correct release number for all software and documents that you refer to. If necessary, include a section on "How to use this guide" as an introduction.

Procedures

- Procedures help the user perform specific tasks.
- Examples:
  - When, why, and how you can perform a task.
  - What the screen will show after you perform a task.
  - Examples of tasks and program operation.
- Tasks include:
  - Identifying the major tasks.
  - Separating each major task into subtasks.
  - Writing a series of steps that walk the user through each subtask.
  - Using an "if-then" approach when explaining decisions that users can make.

Procedures

Procedures help the user perform specific tasks. They are also known as instructions or tasks. Examples of these may include:

When, why, and how you can perform a task, for example, printing a document, cropping an image, uploading a file.

What the screen will show after you perform a task, for example, an updated view of your bank balance.

Examples of tasks and program operation.

Guidelines

- Make sure the instructions actually map on to the product in all respects.
- Include a one-page quick start guide.
- Present instructions as step-by-step procedures.
- Tell the user what functions there are, and what they are for — not just how to use them.

Guidelines (cont.)

- Avoid lengthy paragraphs.
- Use everyday words and terms.
- Explain symbols, icons and codes early.
- Do not assume the user has prior experience or product knowledge.
- Write in the present tense and the active voice.


What's the Difference Between
INCIDENTS,
SERVICE REQUESTS,
AND TICKETS?

Service Request

- A service request is a request for a pre-approved service that your organization can offer to its end users.
- It is a formal request from a user for something to be provided – for example, a request for using a device or license update.
- For example, if a user forgets his password and calls for a password reset, that would be a Service Request.

Service Request

Service requests typically have the following characteristics:

- Approval is automatically granted by the delegated authority.
- The tasks are well known, documented and proven.
- Authority is effectively given in advance for the change.
- The request is included as part of the service offering.
- The risk is usually low and well understood.

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Incident

- An unplanned interruption of an IT service or reduction in the quality of an IT service.
- Something that is a break/fix issue that needs to be resolved. This might be something that is not working properly or could be damaged.
- Examples
  - A broken printer
  - An application that will not load properly
  - When an authorized personnel is unable to access services that should be available to him. E.g. Internet not working in the office.

Change Request (CR)

- A formal proposal for an alteration/addition to product/system.
- Often arises when the client wants an addition or alteration to the agreed-upon deliverables for a project. Such a change may involve an additional feature or customization or an extension of service.
- Because change requests are beyond the scope of the agreement, they generally mean that client will have to pay for extra resources required to satisfy them.
- Handled by the product support team who solves it or forwards it to the developers/DB administrators.

IT Ticketing System

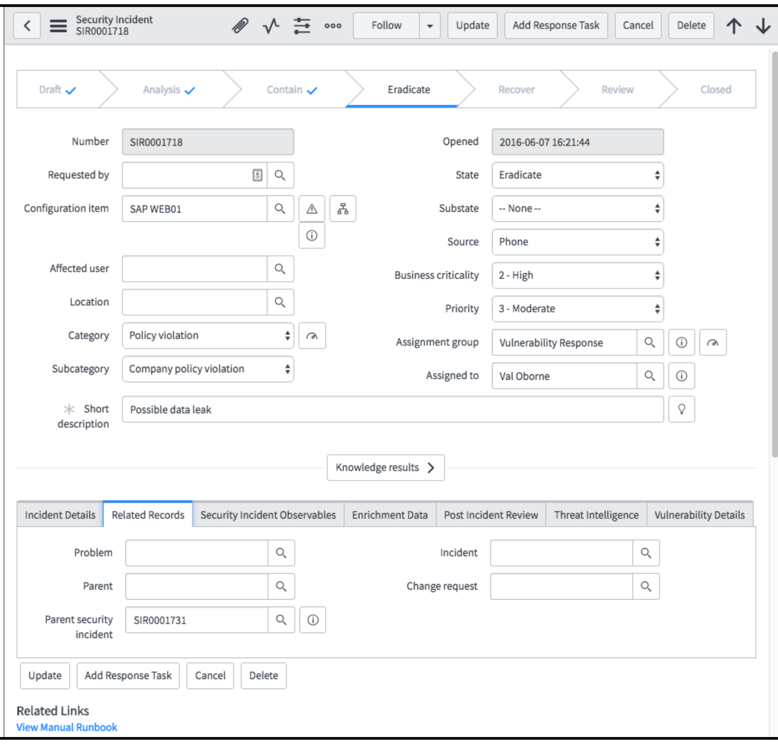
- The core function of an IT ticketing system is to manage all **incoming requests** from other departments in a company and **external requests** from customers.
- Because IT departments have a high volume of requests, they need a system to manage the **lifecycle of every individual request**, from submission to resolution.
- Key objective of installing a ticketing system is ensuring better, faster communication between the ticket sender and issue resolver.

Ticket

- When anything occurs, a “ticket” is submitted.
- The service desk works on the ticket according to workflows the organization has set up.
- Simply put, the incident is the event, and the ticket is the **documentation of the event**. It is the way through which your service desk is alerted of an incident and responds to it.
- Most highly evolved help desks have automated their system so that users can submit tickets and/or issue a service request by visiting a **service portal**.

IT Ticketing System Features

- **Self Service Portal:** A one-stop shop where workers and customers can quickly and easily submit their tickets.
- **Ticket Log:** Sorting tickets by issue type, forwarding requests to appropriate team member and tracking tickets.
- **Assigning Tickets:** Tickets are assigned to a single “owner” who will work on ticket from start to end.
- **Live Support:** 24/7 staffed help-desk or chat service.
- **Multiple Channel Support:** Phone, email or mobile application.
- **File Attachments:** Users attach screenshots of problem or add documents relevant to their current issue.
- **Multi-lingual systems**


Security Incident
SIR0001718
Follow
Update
Add Response Task
Cancel
Delete
Draft
Analysis
Contain
Eradicate
Recover
Review
Closed
Number
SIR0001718
Opened
2016-06-07 16:21:44
Requested by
State
Eradicate
Configuration item
SAP WEB01
Substate
-- None --
Source
Phone
Affected user
Business criticality
2 - High
Location
Priority
3 - Moderate
Category
Policy violation
Assignment group
Vulnerability Response
Subcategory
Company policy violation
Assigned to
Val Oborne
Short description
Possible data leak
Knowledge results
Incident Details
Related Records
Security Incident Observables
Enrichment Data
Post Incident Review
Threat Intelligence
Vulnerability Details
Problem
Incident
Parent
Change request
Parent security incident
SIR0001731
Update
Add Response Task
Cancel
Delete
Related Links
View Manual Runbook

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Do Your Best!