Transitioning Project
Requirements: Worth The Risk

George Edwards
REConf 2017, Munich, DE

28-March-2017
Presenter: George Edwards

Background

- Five years at Merck KGaA\Millipore (Boston)
- Manager, Agile Practices Team in Merck’s Business Technology Department
- Certified Scrum Master
- SME for Jama and JIRA

Prior Experience

- Software Quality Assurance Manager
- Worked at Lotus/IBM, Intranets.com, MathWorks
Jama – A brief introduction

Product development application | Web-based and local installation supported |
Users have project-specific permissions |
Teams like the great features without sacrificing usability
They also like breaking away from paper-based project management
Project Explorer | Review Center | Test Center
Merck KGaA: What we do

Prescription medicines to treat, for example, cancer, multiple sclerosis and infertility, over-the-counter pharmaceuticals for everyday health protection or to provide fast relief of colds and pain, as well as innovations in the areas of allergies and biosimilars.

Innovative tools and laboratory supplies for the life science industry that make research and biotech production easier, faster and more successful.

A wide range of specialty chemicals, such as liquid crystals for displays, effect pigments for coatings and cosmetics, or high-tech materials for the electronics industry.
Identify Products that are ripe candidates for Agile & Scrum and foster them

Support teams with their critical success factors:
- Product Ownership
- Training
- Coaching & Support
- Impediment removal

Engage clear, vocal sponsorship for the Agile initiative
The Struggle to Manage Project Data

Teams are switching away from Word and Excel / paper-based processes

• Traceability – “How do I know there are tests for all requirements?”
• Transparency – “How are others to make sense of this folder of files?”
• Collaboration – “Who’s got the current version of the spec?”
• Issue tracking – “Did everyone report issues that they found?”
• Version control – “This doesn’t seem right. Did someone change this?”
Jama’s growing popularity due to...
- Robust functionality
- Teams like its ease of use
- Adaptable to globally distributed team

The question they commonly ask: **Can our active project team switch to Jama?**
- Adopting a new tool introduces risks
- Nobody wants to disrupt a functioning team

For Merck BT, the answer is often “Yes”
Keys to a successful transition
Plan for success: Move slow to go fast

People like that Jama is easy to use, but success comes with good planning:

• **Provide Training** to ensure team members use Jama correctly
• **Re-use existing documentation** by importing into Jama
• **Understand key Jama functionalities** that will help your project
• Be clear on your **project team’s workflows**
• **Evaluate project reporting and documentation**
• **Consider your schedule**
Offer Jama Training to your Team

• Training options:
  o Internal experts
  o Jama Customer Success Rep
  o Jama videos on YouTube
  o Jama eLearning & Help

• Hands-on training is recommended

• PM’s report that trained teams become productive quickly

• One tip: Start with a small group. Make sure they use Jama correctly.

• Important: Adhere to Jama Best Practices

  “...people that we thought were early adopters were using the tool the wrong way and discrediting it (e.g. exporting the item to send an email for review them instead of using the Review tool).”
Re-use Existing Documentation

“No need to retype anything”

• Import Requirements, Specs, Test Cases from Word and Excel
• Avoid down time typically associated with switching systems
• Consistent formatting and structured information make importing easy
  • Important: Evaluate doc structure to see if it is import-ready

“Creating test scripts in Excel and importing them was easy”
Excel data imported into Jama. The yellow row tells Jama to create a folder.

1.1.1 Sub process “Data Posting” - Process ID: 1
The Process covers the creation, review and subsequent updates to the record posted.
System shall have the ability to track the trial registration process and subsequent updates to the record posted.
System shall have the ability to track the results posting process.
System shall accommodate current and future global study registration and results posting requirements.
System shall have the ability to track the trial registration process and subsequent updates to the record posted.
System shall have the ability to track the results posting process.
System shall accommodate current and future global study registration and results posting requirements.
System shall have the ability to track the trial registration process and subsequent updates to the record posted.
System shall have the ability to track the results posting process.
System shall accommodate current and future global study registration and results posting requirements.

Unique ID: CTD-REQ-524
Name: System shall have the ability to track the trial registration process and subsequent updates to the record posted.
Assigned: Unassigned
Priority: Unassigned
Rating: MAND
Description: System shall have the ability to track the trial registration process and subsequent updates to the record posted.
Release: Unassigned
Centralize the Project IP in Jama’s Project Explorer

- One single source of truth shared with whole team
- Capture templates based on Merck standards
- Export when needed
- Sort and Filter based on your project role
Track Traceability of all Requirements

• Alternative to huge unwieldy spreadsheets
• “Coverage Explorer” identifies gaps in traceability coverage
• Relationship Rules flag items with missing relationships
• **Important**: Set clear expectations about who creates/checks relationships. Otherwise, there’s the risk that they won’t get done.

“Traceability was almost impossible in Word/Excel yet it is mandatory to cover regulatory requests.”
Improve Team Collaboration with the Review Center

Important - Figure this out early. Your team will love it.

Track and facilitate complex review cycles. Capture all feedback.
Managing Testing Efforts in the Test Center

**Plan and organize**

**Compose and assign**

**Track execution progress and pass/fail**

**Log defects** – Can xfer to applications like JIRA

**Important:** Jama supports a well-planned test effort. Think through test structure, assignments, and reporting.
Clarify Project Workflows

• Are project workflows & roles as clear as they should be?
  • SDLC methodology: Waterfall or Agile?
  • Review process: Process and roles
  • Feedback: Agree on how feedback to be collected and responded to
  • Completion: Make sure everyone understands how to get to “DONE”

• Use other applications to manage Stories, Defects, or Final Approval?
  • Decide when information should transfer to the other application
  • Defect workflow: Make sure team understands how issues life cycle
Evaluate Jama Reporting & Export functionality

• Reports – written in BIRT/Velocity
• Exports – Word templates, allow teams to some flexibility in structuring/formatting the data

• Many teams find these easy to use and adequate for generating documentation
• **Important:** Determine early if your PMO/Compliance groups approve Jama’s project documentation
  • If no, assess your options:
    • Do you have internal resources who can create new Reports or Word templates?
    • Contact Jama Software or a Jama Consultant who can offer professional services assistance
Is there time?

Evaluate what you want to accomplish with the amount of time you have

- Expect at least 3 weeks for
  - Project and user account creation
  - Importing and cleaning up project data
  - Getting team buy-in, providing training, and letting people get familiar with the app

- That being said, some teams tactically use Jama for managing user acceptance testing
  - These teams have been known to cut it close schedule-wise but many teams have benefitted from the structured testing environment
In Summary
Jama’s Features Make Transitioning Worth the Effort

- By keeping IP in one secure, organized, highly usable and version-controlled location
- By re-using existing project information
- By leveraging the Review Center for quicker & more productive review cycles
- By demonstrating traceability; knowing that everything planned is tested
- By managing Testing end-to-end
To get there, think it through

• Provide Training
• Re-use documentation
• Understand key Jama functionalities
• ID project team’s workflows
• Evaluate reporting and compliance needs
• Consider your schedule
“Since transitioning to Jama we have been able to work on reviews, testing, defect management and traceability all at the same time.

“JAMA has become the hub of activity on the project and our central collaboration resource.

“We simply would not be able to do the advanced testing we are leveraging for the project without it.”

“Switching to Jama was an easy decision for our project as it represented best-practices in the industry, which we recognized would benefit all parties that we support at Merck.

“After utilizing Jama for the past year, we can comfortably attest to the many benefits we experienced.”

“We had a project with a large number of testers, a huge number of Test Cases, and only 3 days for on-site UAT.

“We were able to get our UAT done as planned, and I don't think it would have been possible without the Jama.

“Using it, we were able to give testers guidance that was clear and easy to follow, track all incidents and integrate our efforts with the vendor.”
### UAT: Traditional PM vs. Jama (& JIRA) Project Management

<table>
<thead>
<tr>
<th>Traditional Project Management</th>
<th>JAMA/JIRA Project Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upfront investment to create scripts using WORD is moderate</td>
<td>Upfront investment to setup JAMA/JIRA required, consider right way of setting up instance otherwise risk of rework</td>
</tr>
<tr>
<td>Effort required to train testers on UAT process</td>
<td>Effort</td>
</tr>
<tr>
<td>Aggregate test summary manually &amp; labour intensive using Excel or other tools</td>
<td>Easy, built in reporting gives ad-hoc status &amp; overview of testing phase. Report engine produces summary out of test cases (Generate ~350 pages test report in 10 seconds)</td>
</tr>
<tr>
<td>Printed 2.000+ pages testing documentation</td>
<td>0 pages (saved more than 1/40 part of a tree)</td>
</tr>
<tr>
<td>Same effort for enhancement releases 😊</td>
<td>Same efficiency for enhancement releases 😊</td>
</tr>
</tbody>
</table>

"Due to efficiency gains using JAMA/JIRA during UAT, we could wrap up UAT phase very quickly. This allowed us to consider releasing our application a few days earlier than planned! **Strong recommendation to use JAMA/JIRA for non-GxP projects!**"
Transitioning project information, such as requirements, tests and defects, to a project development application can seem daunting. Especially when the project teams are accustomed to using Word and Excel. How can it be done without causing widespread disruption? Why take on that risk?

Within the large Business Technology (BT) department of Merck KGaA, Darmstadt, Germany, Jama Software has made the risk worth taking. Adoption rates within BT for in-stream projects have grown steadily as word spread about improvements to collaboration, transparency, and reporting.

The purpose of this talk is to illustrate the approach for transitioning project requirements and other information into Jama Software. This includes transition planning, importing the data, clarifying workflows, and identifying key functionalities to take advantage of - particularly in regards to establishing traceability.