STIBO SYSTEMS
MASTER DATA MANAGEMENT

Creating an Enhancement Request (ER)

February 2021 Version 4

Contents

When Should You Create an Enhancement Request (ER)?

ERs are suggestions by you (the customer) to Stibo System's Product Team to either modify existing functionality or to develop new functionality in STEP.

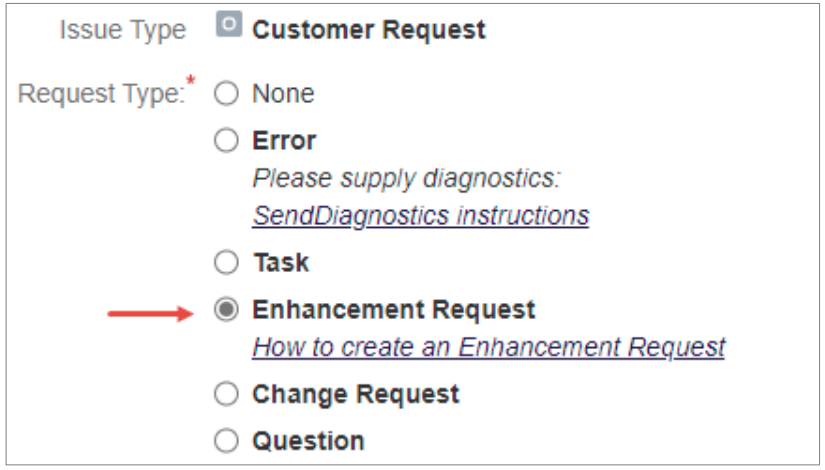
Some ERs are relevant to specific licensed components, such as Flatplanner or GDSN, etc. In this case, if the ER is implemented, updates are made to the "core" system and are available to all customers who have a license for the relevant component.

Common reasons for an ER

1. You reported a "bug" and after investigation you are informed that the system was behaving as it was designed to function. You wish to request a change to the current functionality.
2. You want to see some aspect of the system improved. You recognize (or have been informed) that the system is behaving as designed, but you would like for it to perform differently.
3. You determine that you would benefit from an additional feature in the system, and you think it is one that would also benefit others.

Set the Request Type

- Designate the Request Type of “Enhancement Request” when you create the JIRA issue.



  - If you submit an ER before you verify that the current behavior is normal and expected, your request may be declined because your issue should be first submitted as an Error ticket. A good way to verify that the current behavior is normal is to check the online documentation.
  - ERs are requests for modifying or improving the core STEP system. To request a modification or improvement for an existing customization, submit a Change Request.

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ER Elements

Enhancement Request Elements

Every ER should have at least three (and up to five) distinct areas. In these areas, be concise and clear in your request and avoid ambiguity. Any aspect of your request that is not clearly stated, or can be considered ambiguous, will cause the Technical Product Management (TPM) team to request more information from you.

Each of these ER elements is further defined in the following pages.

1. A required **summary** that is clear, concise, and appropriate. This is really important when lists of ERs in the backlog are reviewed for prioritization.
2. A required **description** of the ER that allows the TPM team to correctly analyze, assess, categorize, and label it.
3. A required **use case** that appropriately describes your need for the ER. What problem are you trying to solve? How can the enhancement improve your ability to solve the problem?
4. A description of how the system behaves currently is sometimes required.
5. A description of how you wish the system to behave if the ER is implemented is sometimes required.

Summary Element

Briefly state what you want the ER to achieve. Try to convey your request so that the reader knows the area of the STEP system that you are referring to and the type of ER that you are requesting.

Provide summaries like these

- Implement the ability to add a watermark to exported image files
- Improve the Test/Check in the workflow designer to better check its operation before committing
- Add an option to export XML files with the Byte Order Marker (BOM)

Avoid summaries like these

- We need a better way to deliver images
- Check workflows better
- Can we have another XML format?
- Our file exports do not work the way they should

Description Element

Expand on the subject stated in your Summary. Try to convey your request in such a way that the reader will have a clear understanding of what you are asking for and to eliminate confusion or misunderstanding. State the area of the STEP system that you are referring to, for example, Web UI, System Setup, API, Tables, etc. Ensure the reader can quickly determine how to properly categorize and label your ER.

Provide descriptions like these

- Add additional capability in the Image Conversion wizard to allow an operator to superimpose a watermark onto an exported image. Options should include how to treat the watermark (tiled, size, location, and angle).
- The current test/checkout of a workflow needs several improvements for variables and parallel conditions. These improvements are described as follows ……
- Add an option to export all XML files with the Byte Order Marker (BOM). It should be available for all the different ways that exports can be done and for all types of XML (STEP, Advanced, Generic).

Avoid descriptions like these

- See the ER title, it should be self-evident
- Refer to issue ACMECO-23 for all information
- We need to handle CAD/CAM images better than we do now
- We don't know if it is supposed to work this way, but if it is then we don't like it
- We can't get our downstream system to accept the files the way they are now

Use Case Element

In the description, include why your ER is significant to you and the situation that has caused you to submit the ER. If appropriate, describe why you think that it would be important to other users of the system.

Provide descriptions like these

- When we go through the workflow, every operator clicks through at least 25 options before it can be moved on. Since most options are not changed, this requires a lot of redundant work. Each operator works through about 50 workflows per day, and this repetitive and redundant work negatively impacts a user's productivity. This would benefit other users who use this type of workflow.
- The capability that was added in STEP version 25.3 works with the 77WorldSync5 format, but we have a new Business Practice that mandates that we need to support the 78WorldSync7 format.

Avoid descriptions like these

- We had this in our former inhouse custom coded system
- Every customer could benefit from this
- Our consultant told us we needed this
- If we had this feature, then three of our attributes would work well for us
- We prefer to do this in STEP because even if our downstream system is really the right place to make this change, it costs a lot of money to update it

Current Behavior Element

A description of the current behavior is not necessary when you are asking for a new feature. But when you want the current system behavior to change, within the description, include as much detail as possible about the current behavior, and include screen shots and any other relevant collateral.

Provide descriptions like these

- Select a product in the Tree. Right click and select option 'x', then select option 'x/3'. Note how the system responds correctly but it doesn't show the 'z' information.
- When setting up the Export Configuration it defaults to selection 'y'. This is counterintuitive since option 'p' was just chosen, and option 'y' would nullify option 'p' and make it an illegal combination of options.

Avoid descriptions like these

- The current method is unworkable and unacceptable
- We do not understand why the system doesn't give us better options to choose from
- The number of choices is unreasonable, we need it to be a filtered list of choices

Requested Future Behavior Element

A description of how you want the system to function after implementing the ER is not necessary, for example, when asking for another check box or radio button option in a particular screen or form. However, when asking for a significant change to the method in which a feature is working, in the description, include your idea as to how this new feature should work.

Provide descriptions like these

- We'd like to see more options at this step in the process. The most frequently selected options should be maintained from one instance to the next, and an 'express' choice should allow the user to launch the task with as few keystrokes as possible.
- When setting up the configuration, we'd like to see some feedback on how the selections might affect response times and file size. And, if possible, show a 'complexity factor' like the Completeness Score, so we can determine which settings cause the most difficulty.

Avoid descriptions like these

- It needs to work intuitively
- Make it configurable based on user, workflow status, priority, and a couple of other useful things

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ER Recommended Practices

Avoid Implementation Details

Details about how to implement the ER are not required. Do not include minute details on how the functionality must work.

Think of the analogy of ordering a taxi in a city you do not know. You tell the driver where you can be picked up and where you wish to go. You do not tell the driver the route to take. You expect the driver to know the roads and to consider the current road conditions, the weather, road works, time of day, and typical traffic problems. In other words, you allow the driver to do their job and select the best route.

Use descriptions like

- It needs to operate with as few options and clicks as possible.

Avoid descriptions like

- …then you need two dropdown selections in the bottom left corner of the popup window and use a radio button to….

Avoid Relying on a Link to the Originating JIRA Issue for Details

Details should be provided in the ER, and not strictly via a link to the JIRA issue that caused the need for an ER.

Your ER should contain all the necessary information for it to be assessed and categorized, even when this means duplicating information from the originating issue.

The originating JIRA issue may have many comments, attachments, and back-and-forth dialog that can be difficult to sift through. In addition, some parts of the issue may be misleading, off-topic, and/or irrelevant to the actual issue. Remember, you only see comments that are visible to you, the customer. While you may see only 15-20 comments, often there are a significant number of internal Stibo Systems comments. All comments can total 100-plus, and in extreme cases, more than 500. Also, if there are a significant number of attachments (which may be unrelated to the root cause), referring the ER to the issue for details can create unintended problems and confusion.

Link to the originating issue when

- You feel that some original background information is important

Avoid relying on information from the originating issue <u>alone</u> when

- It includes a large number of comments and attachments

Avoid User-Specific Terms

Avoid using terminology that is related specifically to your own business terms and acronyms.

Use STEP terms

- Our Inbound Integration Endpoint set up to accept data from our AS/400 system has some limitations and restrictions. When we deliver to one of our downstream systems it causes the following problems.

Avoid “in house” terms

- Our TFS2 loader needs improvement, we can't get it work with our DBSM integration.

Avoid Confusing ERs with Change Requests

ERs are requests from you (the customer) to change existing functionality or add new functionality to the "core" STEP system. That is why, as part of the decision to implement the ER, the benefit to other customers is assessed.

Enhancement Requests are not related to customizations. If a customization that is implemented in your system requires a change, use a Change Request issue type.

Submit an Enhancement Request

- For changes to existing STEP functionality or new STEP functionality

Submit a Change Request

- For modifications to your company’s customization

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ER Workflow

ER Workflow Synopsis

In order to capture suggestions for new STEP functionality, ERs may be submitted in the Stibo Service Portal (JIRA). In JIRA, all ERs are routed through a workflow specifically for the ticket type "Enhancement Request". Previously, customers could not see ERs in JIRA. Now, customers can follow the status and progress of the ER ticket, which eliminates the need to keep the original support ticket open.

ERs in the workflow take the following steps (which are further defined on the ER Workflow Abridged Flow Chart page):

1. Validation for content (i.e., checking that all required information is available and is understandable).
2. Evaluation by the TPM team to determine if it is a valid candidate for a future release. For each STEP release, Product Management selects the ERs that will be included in a release.
3. The ER is confirmed and committed for a specific release.

   OR

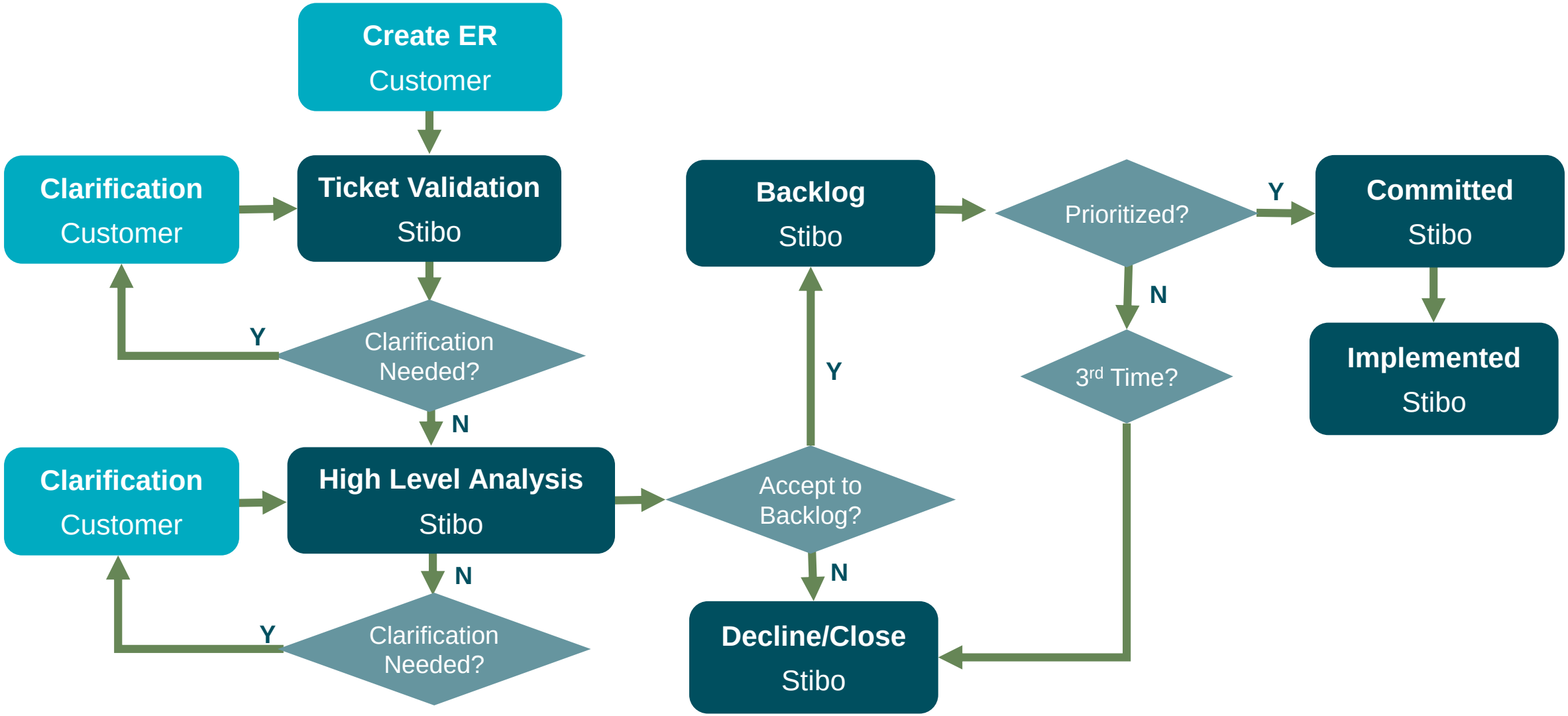
   The ER is closed.

Notes

Until there is a commitment and confirmation that the ER will go into a specific release, there is no guarantee of implementation and, for that reason, there is no delivery timeline.

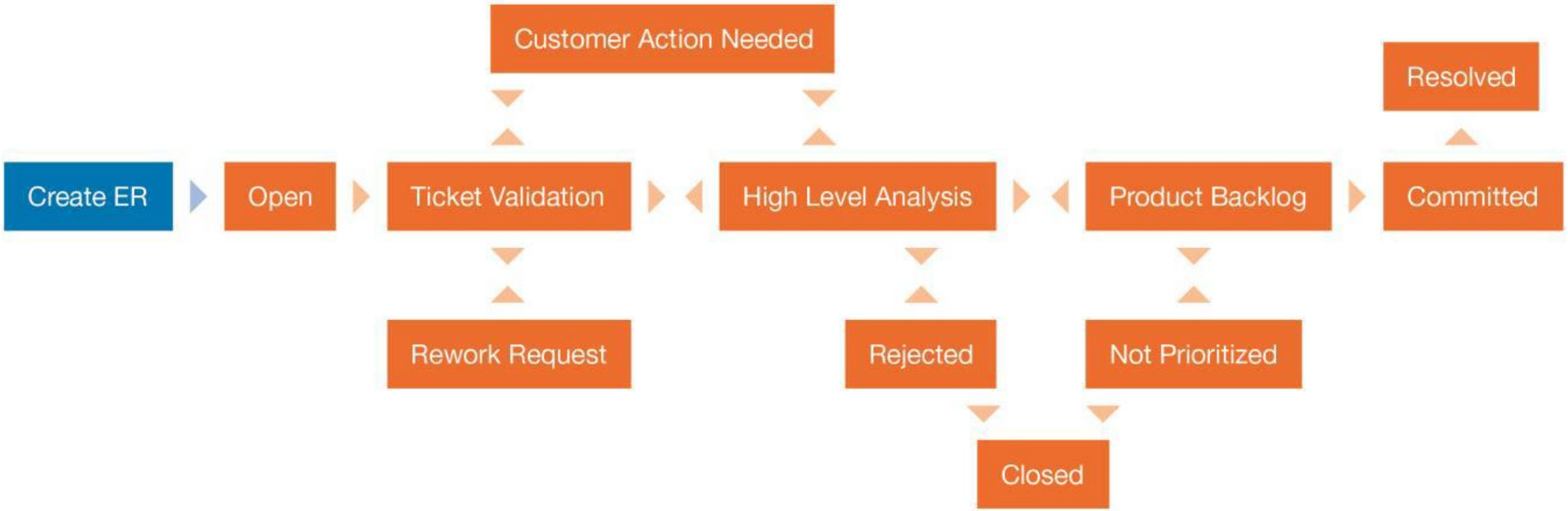
- Submitting an ER does not guarantee implementation, nor does having an ER reach "Product Backlog" status.
- If a "Product Backlog" issue is not included in a release after three (3) release cycles, it is no longer considered a candidate for implementation and the ticket is closed.

ER Workflow Abridged Flow Chart



ER Workflow States

While moving through the ER workflow, an ER issue can be in one of the following states. The definition of each state is defined on the following pages.



ER Workflow State Definitions

In the ER Workflow, each state has the status defined:

- **Open** – the initial state when opening an ER, indicates that a TPM should validate the request.
- **Customer Action Needed** – indicates that more information is needed from the customer.
- **Ticket Validation** – indicates that the ER is being validated by a TPM.
- **High Level Analysis** – the TPM evaluates if the request is a potential candidate for a future STEP release by answering the following questions:
  - Is the requested functionality actually new, or can we already achieve the result?
  - Are there any known suitable workarounds?
  - Is the request inline with the overall product strategy?

  If the ER is suitable as a potential candidate for a future STEP release, the ER is set to **Product Backlog**.

  If the ER is not suitable, it is set to **Rejected**.
- **Declined** – indicates that the ER will not be advanced.

ER Workflow State Definitions (continued)

In the ER Workflow, each state has the status defined:

- **Product Backlog** – the request is added for prioritization by the Product Board. ERs are prioritized two (2) times each year and a comment is added to the ER with each time.

  If the ER is prioritized for a release, the ER is set to **Committed**.

  If the ER is not Committed after three (3) prioritization cycles, it is no longer considered for release and is set to **Not Prioritized**.
- **Committed** – the ER is committed to a coming STEP release and a comment is added with details about the commitment.
- **Resolved** – the committed functionality has been included in a STEP release.
- **Not Prioritized** – the ER has not been selected for inclusion in a STEP release and a comment is added with the reason.
- **Closed** – the ER is closed because it has been Rejected or Not Prioritized and a comment is added with the reason.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