WAYFINDER PM

Navigate your projects with ease:
Agile project management for Salesforce

Administrator's Guide

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Table of Contents

Welcome to WayFinder

Welcome to WayFinder - we're glad you're here!

This Administrator's Guide is here to help you get familiar with the application. In this guide, we introduce you to the application, how to install it, and how to customize security settings through permission sets and add user accounts through user licenses. Then we'll walk you through the features of the application and how you can customize it to suit your business needs.

WayFinder is a lightweight project management tool that follows standard terminology used in Agile project management. The application helps you organize your project and track individual tasks without a steep learning curve.

If there is information you'd like to see in this guide, please drop us a line at WayFinder.Support@Hike2.com.

Product Installation

1. In the AppExchange, navigate to the WayFinder PM listing and click "Get It Now".
2. You will be prompted to select where you want to install the package. Select between Install in Production and Install in Sandbox.
3. In the Confirm Installation Details prompt, review the information and check the I have read and agree to the terms and conditions checkbox.
4. Click Confirm and Install.
5. You will be taken to the login screen. Enter your Salesforce username and password and click Log In.
6. On the next page, select the type of users that you want to install WayFinder PM for:
   Install for Admins Only
   Install for All Users
   Install for Specific Profiles
7. Click Install.

Permission Sets & User Licenses

For WayFinder PM, it is necessary for you to utilize the permission sets that are provided to you through the tool. Two are provided to your org upon installation:

- The **WayFinder PM - Admin** permission set will provide you full access to the tool: all objects, all fields, combined with read, create, edit, and delete permissions.
- The **WayFinder PM - User** permission set will provide you with a more relaxed set of permissions. While similar to the Admin permission set in most ways, this set will **not** provide Delete access.

Either permission set will allow access to the WayFinder PM custom application and its related objects, so be sure to choose which permission set you assign based on the need for a user to perform destructive actions within the tool. More granular permission sets and groups will become available in future iterations of the tool.

Console App Experience

WayFinder PM leverages what is referred to as a **Console** app experience in Salesforce. A console application allows a user to open up and access multiple records at once using sub-tabs to display related records under respective original records. This is a contrast to standard navigation used in most Salesforce apps where you can only open one record page up at a time.

This console experience allows its users to leverage an app that allows for faster-paced work emphasizing the light-weight nature of the tool. You'll notice this behavior as you start to dive into the custom objects that come with WayFinder PM, such as working with Work Tickets under an Epic, or Iterations under a Project.

Read more about Console Navigation in Salesforce Help Article on the subject.

Getting Started

Projects

To create a new Project to manage, navigate to "Projects" and select "New".
This opens up a window where you can fill in standard Project details.

Primary Team - The primary team that is associated or responsible for this specific project. This can entail the project owner, the primary team assigned to completing work, or other similar situations.

Statuses - The statuses stored on the Project object are Budget, Schedule, Scope, Quality, and Overall, and they are represented by Green, Yellow, and Red.

- The **Budget** status field and notes represent the well-standing of projected costs of the project.
- The **Schedule** status and notes represent the accuracy and stability of the project's projected milestone and respective completion dates.
- The **Scope** status and notes represents the stability and well-being of the project's specific goals, deliverables, requirements, and other items related to its scope.
- The **Quality** status and notes represents the well-standing of the project's quality controls, including policies, objectives, and testing.
- The **Overall** status and notes represents the overall status of the project as a whole.

Epics

Your project work can be broken down into Epics. An Epic is defined as a large body of work that can be broken down into individual Work Items.

To create a new Epic to manage:

1. Navigate to "Epics" and select "New".
2. This opens up a window where you can fill in standard Epic details.
3. You may associate your Epic to a specific Project or Iteration and select the Primary Team working on this Epic.

Iterations

The time in which you work on a project can be broken down into Iterations. An Iteration, or Sprint, is defined as a set amount of time reserved for a development. These are unique to your organization but typically last up to 4 weeks.

To create a new Iteration to manage, navigate to "Iterations" and select "New". This opens up a window where you can fill in standard Iteration details. You may associate your Iteration to a specific Project and Primary Team.

Epics vs. Iterations

The primary distinction between Epics and Iterations can be found between their measures. Epics are used to describe a higher level view of a requirement, a story, or a primary object/deliverable hoping to be derived from a project. They measure the level of effort, the priority, and other qualitative aspects of a larger project requirement.

Iterations, on the other hand, work with more quantitative measures, primarily time. Iterations act as an umbrella for Work Tickets, much like Epics, but organizes them on a Start and End date basis indicating when Work Tickets plan to be worked on and/or completed, instead of what larger requirement they are related to.

Epics and Iterations are not mutually exclusive because of these differences, but instead we encourage you to use both types of records when organizing your tracked Work Tickets and Projects. Using both will give you greater high-level descriptiveness tracking for work through Epics, and scheduling ability through the use of Iterations.

Work Tickets

Your Epics can be broken down into Work Tickets. A Work Ticket describes an individual task that can be categorized as different Types

Requirement - A thing that is generally needed or wanted. This is something that needs to be completed for a project to be considered a success. For the purposes of this tool, this can generally be used as a "catch-all" for work ticket triage.

Feature - A distinct aspect or attribute of a particular effort. This can encompass project enhancements, or future projects that may not be large enough to be tracked as a separate project.

User Story - A feature of work written from the user's perspective. The format is "As a ___, I want to ___, so that ___".

Bug - An error or fault in development or configuration, represents something that was previously implemented but is not working as expected after the fact.

Spike - An effort that is required to research potential solutions for a given business problem. These do not typically involve implementation or development work, but deliverables or potential solutions for another piece of work.

Issue - A matter that should be kept as an attention item throughout development. Like Spikes, these are not typical work items, but something that should be considered during development, or throughout the entirety of a project.

Level of Effort

You can estimate the level of effort (LOE) required to complete a Work Ticket. This LOE field is based on Agile methodology t-shirt sizing concept. The sizes do not necessarily equate to a number of hours as much as they correlate to the LOE relative to the other Work Tickets in a Project.

Test Cases

These are a child object found beneath every Work Ticket and they represent the potential test cases that should be run against the requirements/needs of a particular work ticket in order to consider the work fully complete with quality assured. Test Cases store the status of said tests, test plans, expected results, and the actual results of a performed test.

To create a new Test Case to manage, navigate to “Test Cases” and select “New”, or travel to a Work Ticket record and click “New” on the respective related list view found on the Work Ticket record page. This opens up a window where you can fill in standard Open Item details.

Open Items

Represents miscellaneous items, pieces of work, issues, risks, and other points of interests relevant to a project. These records exist to simply keep track of extraneous information or important matters that simply do not fit the criteria of aforementioned objects found in the tool. Contains important reporting fields such as the date an open item may be “needed” and the date it was “resolved”.

To create a new Open Item to manage, navigate to “Open Items” and select “New”. This opens up a window where you can fill in standard Open Item details. You may associate your Open Item to a specific Project, Team, and Team Member.

Teams

This object primarily exists to allow for macro-level assignments between projects, work tickets, and open items to larger groups of individuals. It groups together child Team Member records.

To create a new Team to manage:
1. Navigate to “Teams” and select “New”.
2. This opens up a window where you can fill in standard Team details.

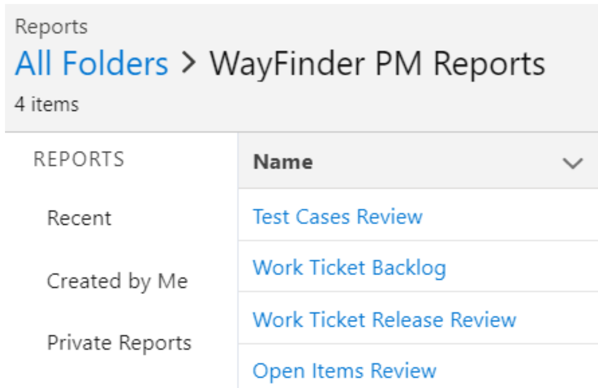
Team Members

These represent the individual resources or members that will be assigned to records such as Work Tickets as Dev Owners, Testing Owners, or even Deployment Owners. It is these Team Member records that allow you (versus Teams) more granular assignment capabilities amongst your tracked project items. Team Members represent individual project team members, such as Admins, Developers, or Project Managers, or other people who may be more distant from the project but still relevant to the project’s success, such as a Project Owner.

To create a new Team Member to manage, navigate to “Team Members” and select “New”. This opens up a window where you can fill in standard Team Member details. You must associate your Team Members to a Team, and they can be optionally related to an existing User in your org.

Reports

WayFinder PM comes with a set of pre-generated sample reports for you to utilize as you navigate through tracking Work Items, Test Cases, and Open Items. Said reports can be found under **Reports** > **All Folders** > **WayFinder PM Reports**. These reports include:



- **Test Cases Review -** Gives a rundown of existing Test Cases, their status, their type, and results. Grouped by Project and by related Work Ticket.
- **Work Ticket Backlog -** Reports on Work Tickets with a focus on priority, level of effort, and the owners of development, testing, and deployment. Grouped by Project and the type of Work Ticket.
- **Work Ticket Release Review -** Gives a report of Work Tickets that are marked as **Ready for Deployment**, detailing deployment notes, method, and notes. Grouped by Project and the type of Work Ticket.
- **Open Items Review -** Provides a review of existing open items that are Open or In Progress, showing owners, teams, and the dates needed for them. Grouped by Project, Priority, and Type.

Past these reports, we encourage users of WayFinder PM to create their own reports as needed for their particular projects and related project needs.

Learn more about creating your own reports on Trailhead.

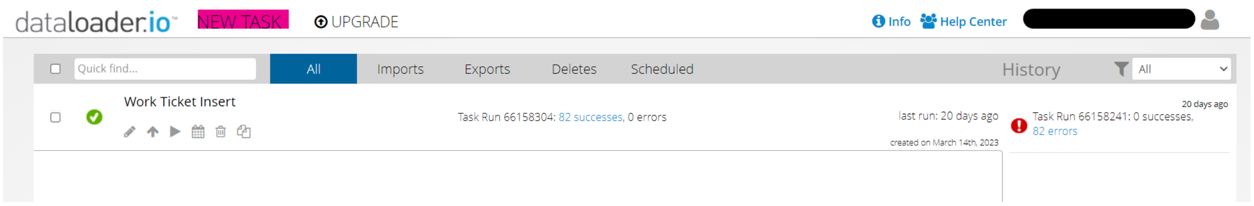
Migrate Project Data

Export the data from your legacy project management tool to a spreadsheet in CSV format. Clean up your data by checking that all the columns (fields) that were exported from your legacy system are fields that you would like to keep in WayFinder.

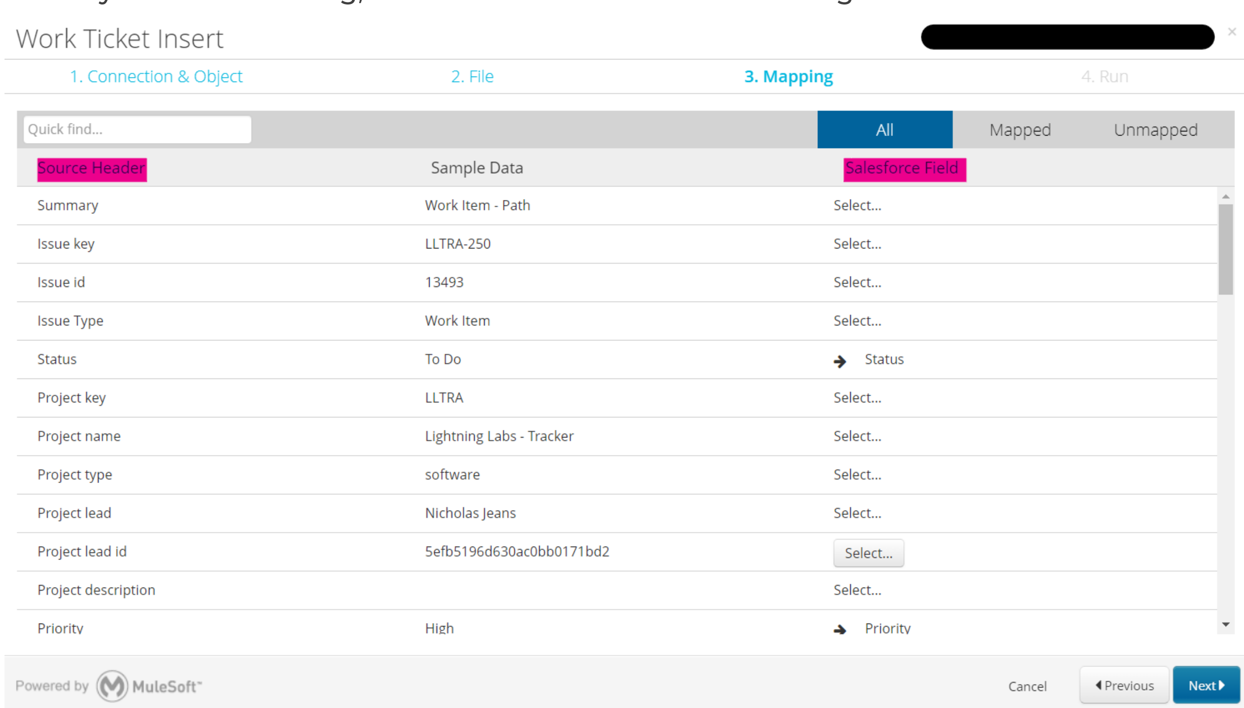
For any fields you wish to retain that are not standard in WayFinder, you will want to add them to the Work Ticket object. See the “Add Custom Fields to a Standard Object” section in this guide.

Now you are ready to import your data into WayFinder. There are many free tools available to import data into your Salesforce Org. In this guide, we describe how to import data using Data Loader.

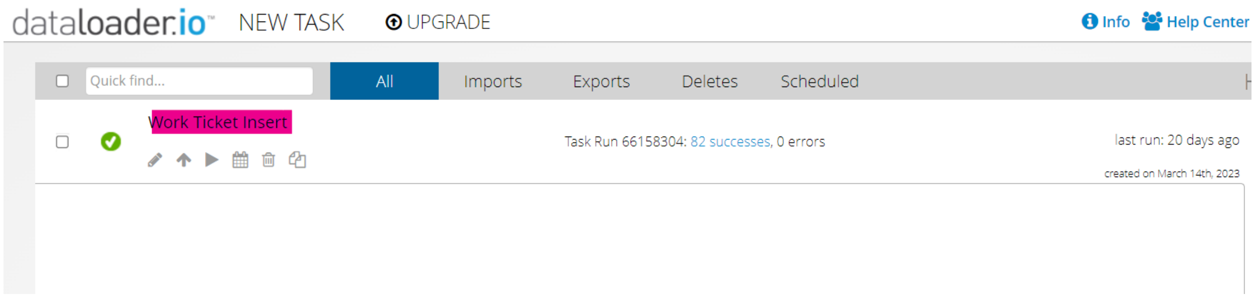
1. Visit this link https://dataloader.io/
2. Click the "Log in with Salesforce" button in the top right of the screen. Use your org credentials to log in.
3. Click "New Task" at the top of the screen



4. Select "Import"
    a. Under connection, your Salesforce org will be listed.
    b. Under operation, insert should be selected.
    c. Under object, Work Ticket should be selected. If you need to import data into a different object or a custom object, you may select that here.
5. Click "Next"
6. Click "Upload CSV" and navigate to the CSV format spreadsheet that contains the data you wish to import.
7. Now you can map the existing data in your CSV into the destination Salesforce org. The column on the left titled "Source Header" contains the names of the fields (columns) that are present in your CSV. These fields should be mapped to an existing field in your Salesforce org, "Salesforce Field" column on the right.



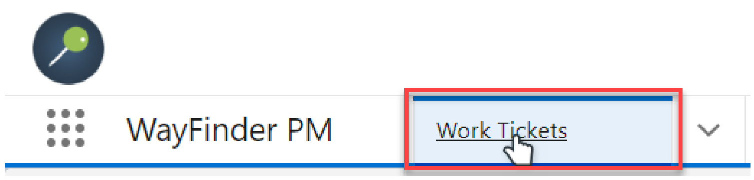
8. When you are finished mapping the existing fields to destination fields, you can click "Next". You will be presented with a summary. Double-check that the information is correct and select "Run".
9. You can manage your import and see the status in the main page of Data Loader.

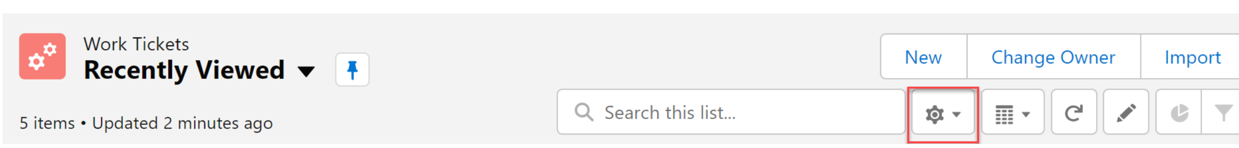


Customize WayFinderPM for your Org

List Views

While WayFinder PM comes with a host of sample list views out of the box, users are by all means permitted to create and customize their own list views catered to their own project or personal needs. The tools to do so can be accessed by clicking on the respective object name directly at the top left of your browser window. From there, click on the gear icon found on the right end of the List View header.





From the menu that follows, you can modify existing list views, create new ones and share them, and select the specific fields that are displayed, for whichever object that you wish.

Learn more about creating and customizing your own list views on Trailhead.

Customize WayFinder for your Business Processes

One of the strengths of WayFinder PM compared to other project management tools is the ability to customize it to fit your team's business and management processes as closely as you need to. Objects such as Work Ticket and Open Item are left intentionally open-ended, for example, to be molded for any purpose.

New users to experienced Salesforce admins are able to configure the tool, through changes to Lightning Pages, Object fields, and other pieces to create a highly customized experience that is not prescribed the moment of installation. Experiences with WayFinder PM can vary greatly from Org to Org as a result.

Add Custom Fields to a WayFinder Object

As an example of customizability, you and/or your team may discover that while there is a respectable amount of tracking ability in the Work Ticket object, there are some other pieces of information that you are looking to track on a record basis that don't exist as fields right now. To accommodate this, your team's admin can configure new fields and easily add them to your layouts to begin tracking right away.

Adding fields can be done by traveling to **Setup**, and then navigating to **Object Manager**. Select the object from WayFinder PM that you would like to add fields to, such as Work Ticket; navigate to **Fields & Relationships** on the left sidebar of the object view and select **New** to go through the field creation wizard.

When you've created the fields you like, be sure to add them to the record's respective lightning page. You can manage this by viewing the existing record page of any record of the respective object, and go to **Edit Page** found under the same Cog button you would find **Setup**. From the builder that you enter into, you can select from the Fields tab in your left sidebar whichever field you would like to place and where.

Learn more about Lightning Pages and Dynamic Forms through Salesforce's Help Article.

Uninstall

The WayFinder PM package can be uninstalled by simply traveling to **Setup**, and searching for **Installed Packages** in the left Quick Find sidebar. Once there, scroll down to the list item for WayFinder PM and click Uninstall.

Salesforce will ask you if you'd like to keep data about the app or delete it all with the app. Once confirmed, Salesforce will handle the uninstallation of the app for you, and after some time the app will be removed from your org.

Need Support?

Please reach out to us at WayFinder.Support@Hike2.com with comments or questions.