

BT Issues Guide: Contents

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1 Managing Issues in Business Transformation

JIRA is the tool used by the Business Transformation Programme for recording and managing issues. Issues are an important aspect of any project or programme and must be identified and managed to a predefined framework to ensure consistent and reliable application across teams and the programme.

1. Definition of an Issue

An **issue** is an unplanned situation that has occurred and justifies management consideration and possible action. If left unresolved it will impact upon the achievement of investment objectives. An **issue** can also be a risk which has come to fruition and requires resolution.

2. Rating an Issue

The Issue rating is based on the analysis of the impacts and the determination of the level of consequences as prescribed in the IR ERMP/F.

- **Low** - Any impact which is assessed as Minimal within the relevant Consequence Matrix.
- **Medium** - Any impact which is assessed as Minor within the relevant Consequence Matrix.
- **High** - Any impact which is assessed as Moderate within the relevant Consequence Matrix.
- **Very High** - Any impact which is assessed as Major within the relevant Consequence Matrix (eg an issue that has a high chance of moving a major milestone date or increasing cost if not resolved.)
- **Extreme** - Any impact which is assessed as Severe within the relevant Consequence Matrix (eg the issue must be resolved immediately or a major milestone/implementation date will be moved and/or there will be a significant increase in cost).

3. Escalating Issues

Issues generally materialise at the workstream level and are managed appropriately. However, at times, an Issue may need further management intervention either at the PLT or PGC level. Below are a set of criteria to determine if management escalation is required.

	PLT	PGC
For an issue	<ul style="list-style-type: none"> • issues are systemic (across more than one workstream) • issues rated as Extreme • issues stop a deliverable being met • issues impact outside of the Programme (inter-dependencies) • issues have the following themes: <ul style="list-style-type: none"> ○ ongoing resource constraints ○ serious business or external stakeholder impact ○ legislative implications ○ public perception/media implications. • issues rated as High and mitigation strategies are not effective • issues already monitored at Programme-level and identified to be merged or for closure • a major change of the wording leading to a change in the nature of the issue • a change of the rating decreasing from Extreme or increasing to Extreme. 	<ul style="list-style-type: none"> • issues rated as Extreme • issues rated as High with non-effective mitigation strategies • issues already escalated and qualified as "Major" for monitoring purposes.

4. For more general tips and guidance with regard to managing issues in JIRA

1 Managing Issues in Business Transformation

Refer to the General Tips and Guidance - Risks and Issues guide which includes instruction on how to create filters, dashboards, bulk editing and more.

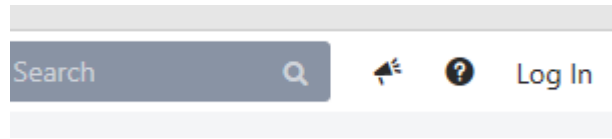
1 Creating a New BT Issue in JIRA

This section provides guidance on how to create a new issue in JIRA.

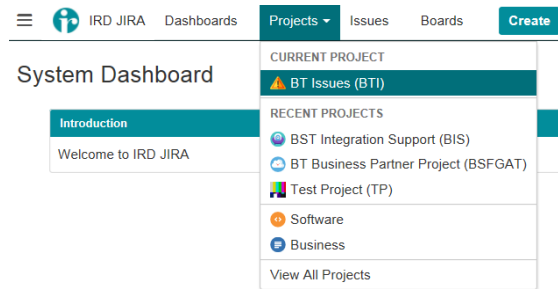
To access JIRA:
<https://jira.nsp.ird.govt.nz>

Your log-in should happen automatically

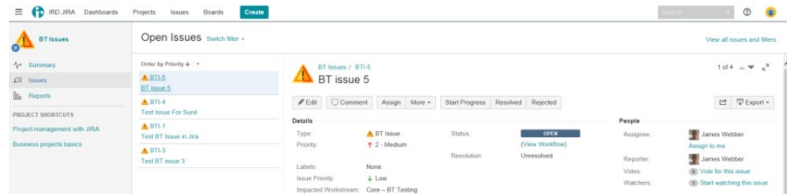
However, if the "Log In" button is showing at the top right of your screen, click on this button and if prompted enter your IRD Username and Password.



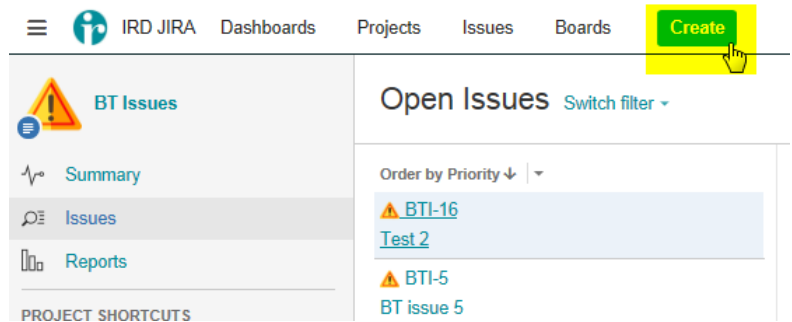
1. Select the **Projects** dropdown and choose **BT Issues (BTI)**



2. You will be taken to the **BT Issues (BTI) Homepage**.



3. Click **Create** to open a new BT Issue. You will be prompted with a pop-up box to begin drafting your Issue.



1 Creating a New BT Issue in JIRA

4. To create your new BT Issue, the following fields are populated. An asterisk marks mandatory fields.

Project –BT Issues (BTI)
Issue Type – BT Issue
Summary – a brief description of the Issue
Issue Priority – The issue rating will be based on the analysis of the impacts and the determination of the level of consequences as described in the ERMP/F.
Security Level – option to secure your risk for visibility to a selected group. Note: Please discuss this option with the BT PMO first.
Release – enter the release your risk relates to i.e. for major releases, use "X.SRT.0 START Release X"; for other releases use "Release X"
Escalation – The level at which the risk is to be managed: workstream, release, PLT, PGC (programme)
Issue Owner – the senior person accountable for the issue, ie, a PLT member or workstream lead.
Assignee – The person who will manage and is responsible for the issue. Leaving the field as default (auto-assign) JIRA will assign based on the component lead.
Component/s – this is the workstream who will own the Issue, e.g. Programme Management Office
Category – select an appropriate Category based on the IR ERMP/F
Initial Due Date – due date when issue first raised (cannot be edited once set)
Due Date – target date for Issue resolution
Description – provided a detailed description of the Issue and provide all Planned Actions
Labels – add multi tags if known to make search easier, e.g. START
Linked Issues / Epic Link – use this option to add an issue or epic

The screenshot shows the 'Create Issue' form in JIRA. The 'Project' is set to 'BT Issues (BTI)' and the 'Issue Type' is 'BT Issue'. The 'Summary' is 'TEST Issue' and the 'Issue Priority' is 'Medium'. The 'Security Level' is 'None'. The 'Release' field is empty. The 'Escalation' is set to 'Workstream'. The 'Issue Owner' is empty. The 'Assignee' is 'Automatic'. The 'Reporter' is 'Marie Hickman'.

The screenshot shows the 'Create Issue' form in JIRA, continuing from the previous one. The 'Component/s' field is empty. The 'Issue Category' is 'Schedule'. The 'Initial Due Date' and 'Due Date' fields are empty. The 'Description' field is empty. The 'Labels' field is empty. The 'Linked Issues' field is set to 'relates to'. The 'Issue' field is empty. The 'Epic Link' field is empty.

5. Once complete Click **Create** to formally raise the Issue. A specific Issue number will be generated and the issue will be in the **New** Status.



1 Creating a New BT Issue in JIRA

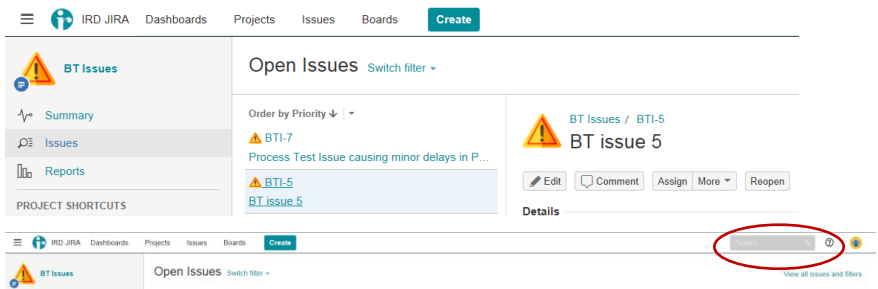
2 Updating a BT Issue in JIRA

This section provides guidance on how to update an issue in JIRA.

Finding an Issue

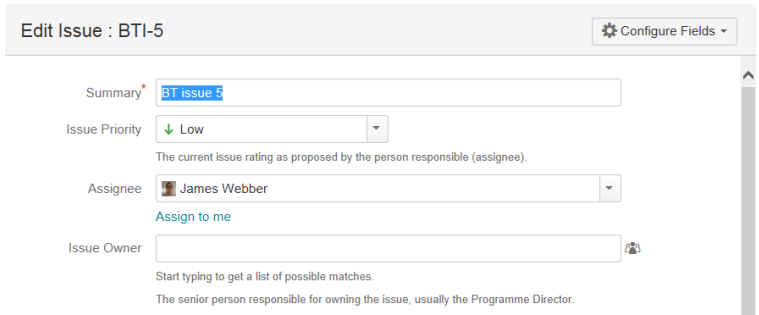
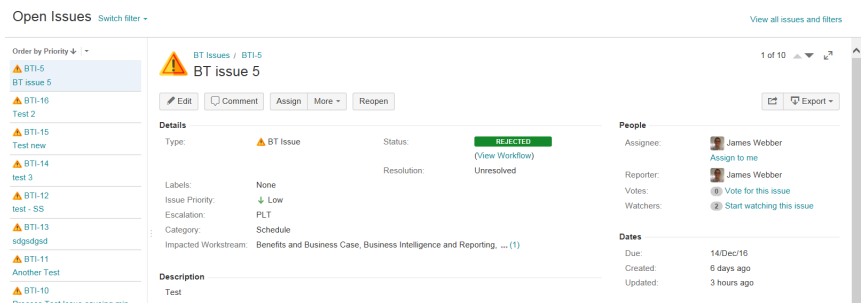
Once an Issue has been created it can be tracked, managed and updated.

1. Select **Issues** from the left-hand menu. This will open a list of **Open Issues**.
2. You may search for an Issue using the Search function, type the Issue #, press Enter or a keyword such as JIRA



Editing an Issue

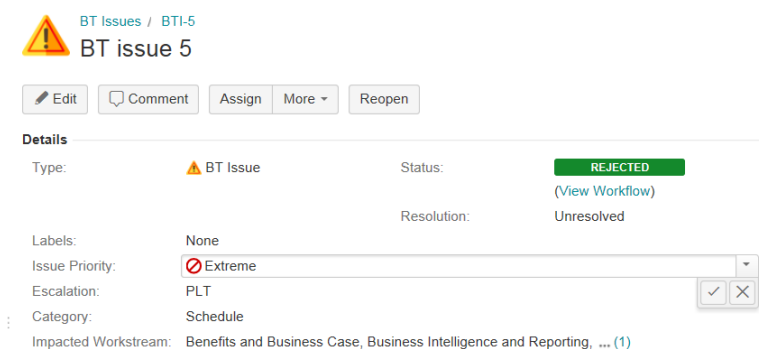
1. Under **Open Issues** select the **Issue** you would like to manage, eg, BTI-5.
2. The selected **Issue** will open within the browser window
3. Click **Edit** to update the **Issue** and a pop-up window will appear.
4. You may edit any field relating to the **Issue** you want to update, ie, Summary, Issue Priority, Assignee, Category etc etc
5. Click **Update** to save the changes you have made to the **Issue**.



Inline editing

If you want to make a quick update to a single field.

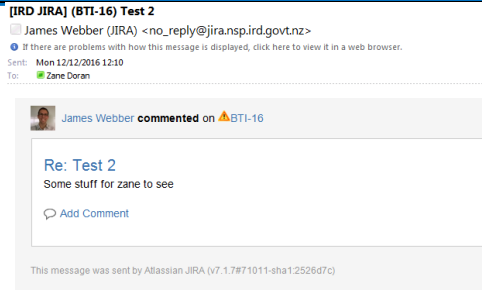
1. Hover the field, ie, **Issue Priority** and select the appropriate status.
2. Click the 'Tick' icon to save change to change **Issue Priority** to 'Extreme' in this example.
3. If you don't want to save the change, Click the 'X' icon to revert back to the current **Issue Priority**.
4. The **Assignee** will receive an email letting them know a



2 Updating a BT Issue in JIRA

change has been made to the Issue.

- 5. The email notification contains links to the Issue in JIRA, allowing quick access for review.



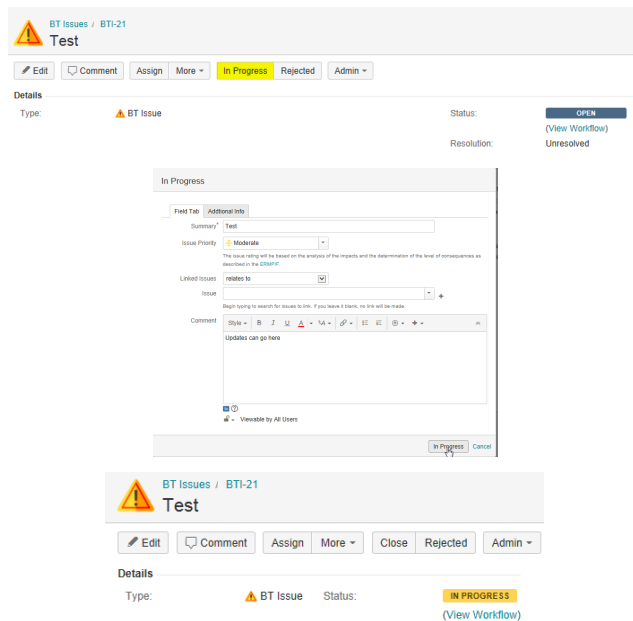
Note: All "watchers" of your risks and issues will receive a notification email when changes are made within the JIRA ticket. Following JIRA upgrade 8.3.4 (Q4 2019), the notifications are batched and sent between 30-60 mins).

Note that the time counts down from first edit on an issue – then all changes made on that issue within the next hour will be sent at the end of that hour. If you would like someone to receive a notification sooner, add an @name mention in the comments field and they will receive the notification immediately.

To reduce email traffic (still worthwhile as your edits may not be captured in the timed hour), editing can be done in one screen, this will then summarise all changes in one email.

Changing an Issue Status

1. When working on an issue it should be in status **In Progress**
2. Select the **In Progress** button from the top of the issue.
3. An In progress dialogue window will be displayed, update and choose **In Progress**



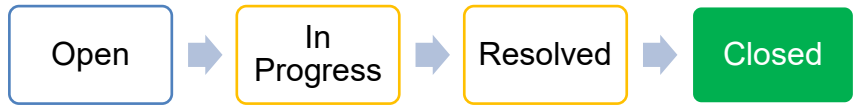
The Status is now **In Progress**.

2 Updating a BT Issue in JIRA

3 Closing a BT Issue in JIRA

This section provides instructions on how to close an issue in JIRA.

When the resolution actions have been complete for an Issue and reviewed by the Issue Owner it can be set to **Closed**.



1. The Issue Owner reviews the issue resolutions provided and chooses to close the Issue.
2. Choose the **Closed** button from the top of the issue.

BT Issues / BTI-138

PMO Functional Test

Details

Type:	BT Issue	Status:	RESOLVED
			(View Workflow)
Component/s:	PMO	Resolution:	Done

If the Issue Owner is not satisfied with the resolution of the issue

3. If the Issue Owner is unhappy with the resolution, they may select **Back to In Progress**.

BT Issues / BTI-138

PMO Functional Test

Details

Type:	BT Issue	Status:	RESOLVED
			(View Workflow)
Component/s:	PMO	Resolution:	Done

4. The Issue Owner provides reasoning for the decision and selects **Back to In Progress**.

Back to In Progress: BTI-138

Field Tab | Additional Info

Summary* PMO Functional Test

Issue Priority

The issue rating will be based on the analysis of the impacts and the determination of the level of consequences as described in the [ERMP/F](#).

Linked Issues

Issue

Begin typing to search for issues to link. If you leave it blank, no link will be made.

Comment

Style | B | I | U | A | | | | |







not happy with the resolution.

3 Closing a BT Issue in JIRA


- 5. The Issue is now set back to **In Progress** until the Issue Owner is happy that the issue has been resolved appropriately.

BT Issues / BTI-138

PMO Functional Test

 Edit  Comment  Assign  More  Resolved  Rejected

Details






Type:	 BT Issue	Status:	IN PROGRESS (View Workflow)
Component/s:	PMO	Resolution:	Done

If closing an issue without exception to the resolution(s)


- 6. The Issue is now **Closed**. And the **Resolution** is marked as **Done**.
- 7. An Issue may be **Reopened** at any time if required.

BT Issues / BTI-138

PMO Functional Test

 Edit  Comment  Assign  More  Reopen

Details

Type:	 BT Issue	Status:	CLOSED (View Workflow)
Component/s:	PMO	Resolution:	Done

4 Resolving a BT Issue in JIRA

This section provides instructions in order to close an issue in JIRA.

When the resolution actions are complete for an Issue it can be set to **Resolved**. An Issue must be set to **Resolved** before it can be **Closed**.



1. Choose the **Resolved** button from the top of the issue.



Details

Type:	BT Issue	Status:	IN PROGRESS (View Workflow)
Component/s:	PMO	Resolution:	Unresolved
Labels:	None		
Issue Priority:	↓ Low		
Escalation:	Workstream		
Issue Category:	Technical		
Impacted Workstream:	Programme Management Office (PMO)		

2. A simple resolved screen will be displayed.
3. Update the **Comments** with details of the issue resolution for the Issue owner to review.
4. Choose **Resolved**.

Resolved: BTI-138

Field Tab | Additional Info

Summary* PMO Functional Test

Linked Issues relates to

Issue +

Begin typing to search for issues to link. If you leave it blank, no link will be made.

Comment

Style | B | I | U | A | | | | | | | |

5. The Issue is now **Resolved**. And the **Resolution** is marked as **Done**.
6. The Issue is now ready to be reviewed and closed by the Issue Owner.

[BT Issues / BTI-138](#)

PMO Functional Test

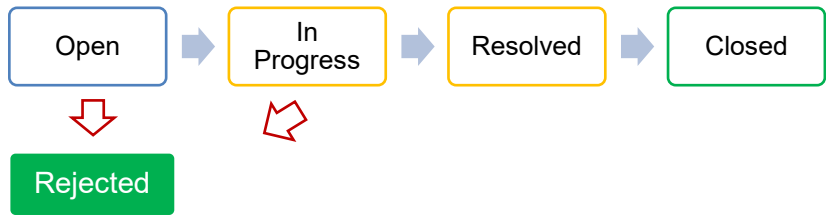
Details

Type:	BT Issue	Status:	RESOLVED (View Workflow)
Component/s:	PMO	Resolution:	Done

5 Rejecting a BT Issue in JIRA

This section provides instructions on rejecting an issue in JIRA.

If an issue is created in error or not accepted as being an issue the assignee can reject the issue. The issue is set to **Rejected**.



7. Add a comment about why this issue is should be closed.

8. Choose the **Rejected** button from the top of the issue.

The Issue is now **Rejected**. And the **Resolution** is marked as **Won't Do**.