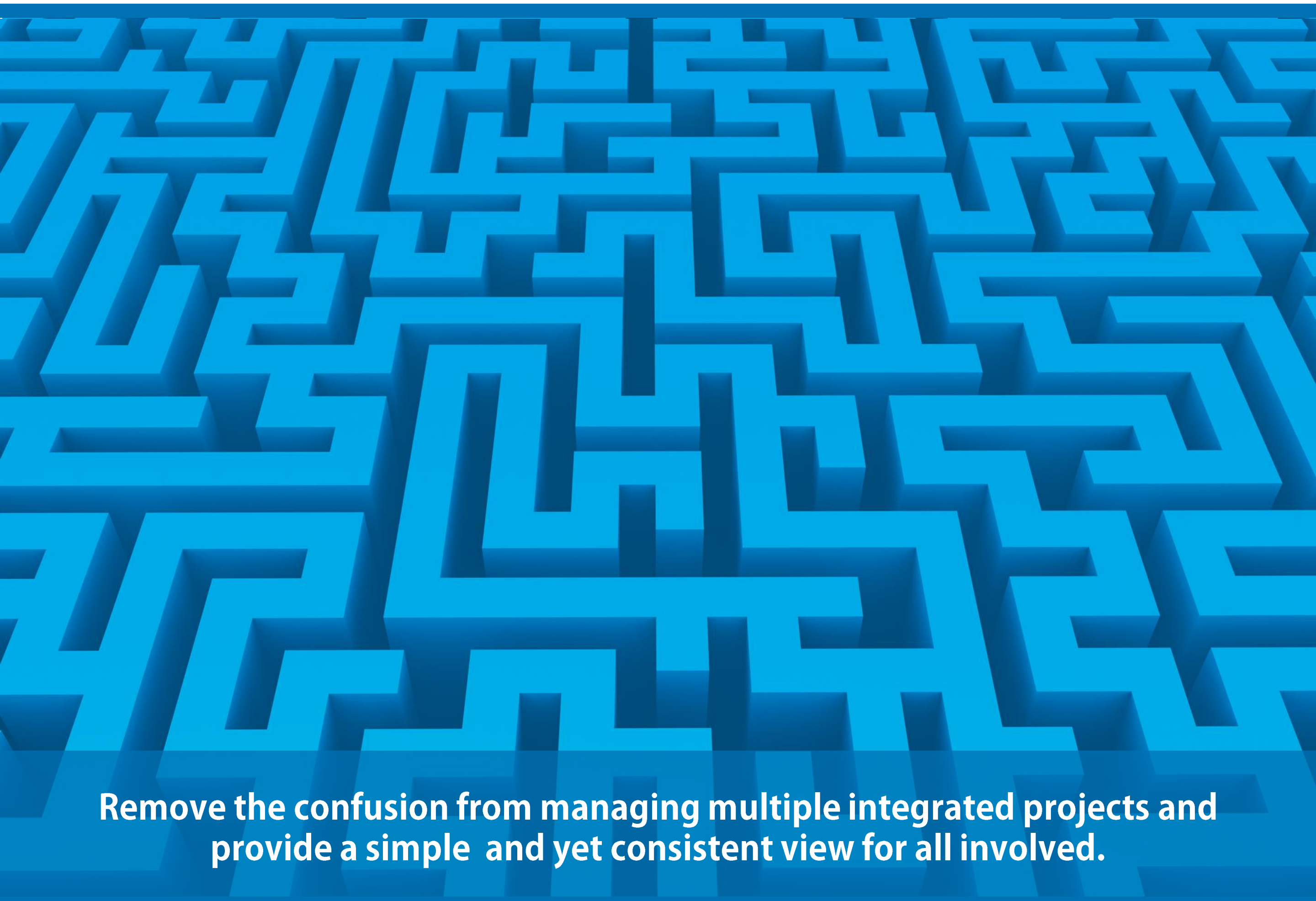
PROGRAMME AND PROJECT MANAGEMENT GUIDE FOR JIRA

VERSION 1.0

DATE:2021



Remove the confusion from managing multiple integrated projects and provide a simple and yet consistent view for all involved.

PROVIDING AN INTEGRATED DELIVERY LANDSCAPE FOR PROGRAMMES

Content

Overview / Purpose

Introduction

Zenneo Design has provided an agency wide Jira design for programmes / projects to use, reducing the need for the development of individual Jira solutions. This solution is known as the Integrated Delivery Landscape (IDL), and can be applied across the delivery of a programme.

The IDL was initially developed to support large scale programmes of work with visibility of the backlog, tracking dependencies between projects, reducing the time requirement of reporting, and allowing project managers to focus on delivery rather than tool configuration.

Use of the unified design enables reduction in the time it takes to set up Jira for a project, creates consistency in the Jira data structure, and promotes the use of organisational processes and knowledge.

The IDL also enables tracing individual tasks and features back to agency level strategic objectives and themes.

Features of the Jira solution include:

- Automated Jira project setup
- Project management and reporting tools
- Issue hierarchy and taxonomy
- Activity templates
- Automated activity creation
- Jira governance

How to use this guide

This guide has been produced to inform project managers, release train engineers, scrum masters, and teams on how to complete Agile projects within Jira in the agencies environment. It is intended as a reference document, and so it should be referred to when there are questions about the use of particular features of the IDL.

This guide contains information and pull-outs including:

- Creating programmes, projects and Gantt views
- Agile definitions
- Defined processes and workflows
- How to create reports and dashboards
- How to update activities

Structure

Integrated Delivery Landscape

The IDL consists of three main tools: Jira, and two plugins that have been integrated into and are directly accessible from Jira. BigPicture has been integrated to provide portfolio, programme and project management capabilities including Gantt views and risk management. EazyBI is a dashboard and reporting tool that allows for the creation of charts that can be added to real-time dashboards. These dashboards can be automated to send daily snapshots to users, or customised by users to meet specific one-off reporting requirements.

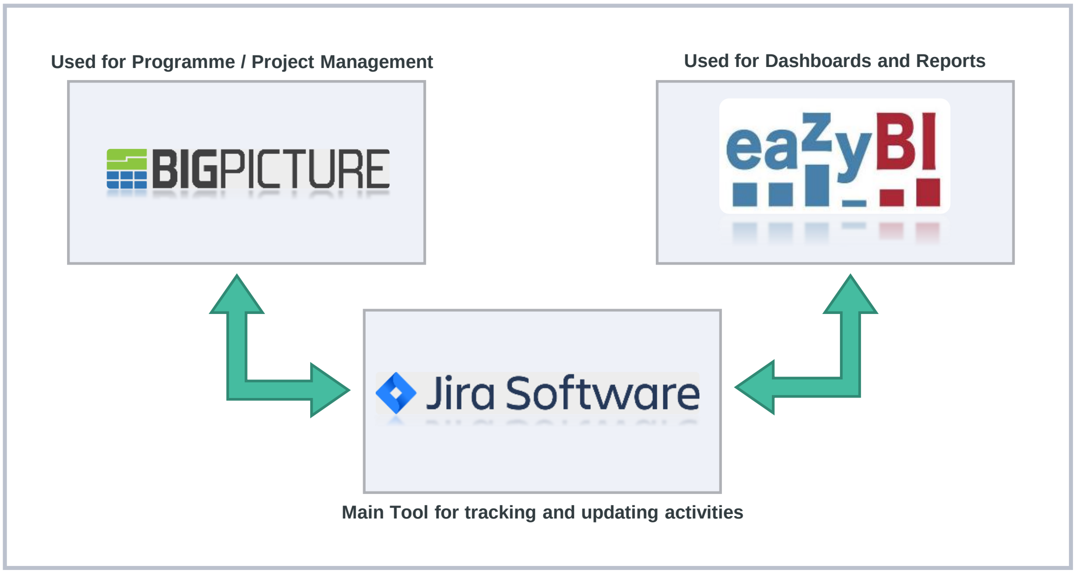

Used for Programme / Project Management
BIGPICTURE
Used for Dashboards and Reports
eazyBI
Jira Software
Main Tool for tracking and updating activities

Table 1: IDL tool details describing capabilities and primary users

Tool	Description	Primary Users
JIRA	Issue tracking software with workflows and process definitions.	All project teams (MDT, Discovery, BAU, etc.)
BigPicture	Portfolio/Programme/Project Management Tool. Provides graphical hierarchy view, GANTT chart, Agile Dependency Map, Agile risks and issues.	- Scrum Masters - Project Managers - Product Owners - Product Managers - RTE - Programme Management Office
EazyBI	Dashboard and reporting solution.	- Scrum Masters - Project Managers - Product Owners - Product Managers - RTE - Programme Management Office

Definitions

Term	Definition
Activity	Activities are the smallest unit of work for a deliverable, and are automatically generated for each phase. These usually are items that can be delivered within hours or 1-2 days.
Acceptance Criteria	The set of predefined requirements that must be met in order to mark a feature as complete. Acceptance criteria are created for each feature individually as part of feature definition.
Board	A board displays issues from one or more projects, allowing for the viewing, managing, and reporting of work in progress. There are two types of boards in Jira Software: Scrum board: For teams that plan their work in sprints. Includes a backlog. Kanban board: For teams that focus on managing and constraining their work-in-progress. Includes the option of a Kanban backlog. A project can have multiple boards, and a combination of Scrum and Kanban boards.
Done	Definition of Done is an agreement between Development Team and the Product Owner on what needs to be completed for each feature in order for it to be considered 'done'
Epic	An Epic is a set of requirements that together deliver business value greater and touch the same portion of the service, either functional or logical.
Feature	A Feature is a service that fulfils a stakeholder need. Each feature includes a benefit hypothesis and acceptance criteria, and is sized or split as necessary to be delivered by a single project or Agile Release Train (ART) in a Programme Increment (PI).
Field	Fields hold the information about an issue, and each issue type can have different fields. How these fields behave is defined by a field configuration.
Issues (risk management)	An issue can be defined as an unplanned event that has happened, which requires management actions. In other words, an issue is a risk that has been realised.
Mitigation	A mitigation is an action that has been or will be taken to reduce the likelihood of a risk, or the risk's impact if it does occur.
Priority	Priority defines an issue's importance in relation to other issues.
Programme Increment (PI)	Programme Increment: A Programme Increment (PI) is a period during which an Agile project plans and delivers features in the form of working, tested software and systems. PIs are typically 8 weeks long.
Programme	A programme is a high-level view that helps you track status and progress across multiple projects. Programmes provide visibility of deliverables and releases across work streams, and aggregate data into tables and schedule views.
Project	In Jira, a project is simply a collection of issues (activities, releases, tasks, etc). A project typically represents the development work for a product, project, or service.
Ready	The criteria that a specific feature has to meet before being considered for estimation or inclusion into a programme increment.
Release	A release is the process leading up to and following the deployment of features into the production environment. To be accepted, a release must meet criteria set out in the Design for Run Framework (DRF).
Risk	Risk is the possibility of an event or activity preventing an organisation from achieving its outcomes or objectives. An effect is a positive, negative or both, and can address, create or result in opportunities and threats. Risk is measured in terms of impact and likelihood.
Screen	A screen defines how fields are displayed for an issue. Different screens can be used when an issue is created, viewed, edited, or transitioned through a workflow.
Sprint	A sprint is a short, time-boxed period when a scrum team works to complete a set amount of work. Sprints are at the very heart of scrum and agile methodologies, and getting sprints right will help your agile team ship better software with fewer headaches.
Task	A Task is the smallest unit of work that can be registered. These usually are items that can be delivered within hours or 1-2 days.
Workflow	A workflow is made up of statuses and transitions. An issue moves between statuses via a transition. The workflow defines what transitions and statuses an issue type can use.

Default Jira Terms

There are some terms that are defaulted in Jira that cannot be changed. These have been identified below for clarity and to prevent communication issues, as there can be differences between programme and project terms and Jira terms.

Jira Term	Description
Issues	Jira refers to all ticket types as 'issues'. Issues can represent any piece of work, from whole programmes of work down to tasks for running workshops. This is especially important to note when creating reports to ensure the correct issue type is used when reporting risks.
Workflow	A workflow is made up of statuses and transitions. An issue moves between statuses via a transition. The workflow defines what transitions and statuses an issue type can use.
Boards	The Board provides filters that determine which issues appear on the board. It can be based on one or more projects, processes, or custom Jira Query Language (JQL) depending on your needs.
Project	A Jira project is a shared workspace, used by project managers, delivery teams, executives, and other internal teams. In Jira, a project is simply a collection of issues (activities, releases, tasks, etc). A project typically represents the development work for a product, project, or service.

More About Issues

What are issues?

Issues are the building blocks of any Jira project. Issues can represent any piece of work, from whole programmes of work down to tasks for running workshops.

Who can create issues?

Everyone involved in a programme can create different types of issues for different purposes.

What is an issue phase?

Every issue type has its own lifecycle. Different stages in that lifecycle are called 'phases'. Generally, there will be rules that determine when an issue is able to move to the next phase in its lifecycle. These rules are elaborated in the section for each issue type, below.

What is an issue field?

Each issue type will have a number of fields that can be filled by the user. These are the qualities that distinguish one issue from another, for example, the name of the issue, who it is assigned to, and when it is expected to be completed.

What are activities?

Activities are a special type of issue that are automatically generated by the system. In order to move an issue from one phase to another, for example moving a release issue into the 'release staging' phase, you must complete all of the activities that are associated with the current phase.

Types of issues include:

- **Features**
- **Activities**
- **Tasks**
- **Risks**
- **Mitigations**
- **Epics**
- **Releases**

Managing a Jira project

A Jira project is a shared workspace for project managers, delivery teams, executives, and other internal teams. It contains all the information that is relevant to the delivery of a particular project, such as deliverables, issues, dependencies, and timelines. In order to meet the needs of all its users, a Jira project will utilise a number of plugins, for example BigPicture and EazyBI, in order to give users access to information and features that support their role.

Configuration and tailoring of a Jira project may be required in order to meet user needs, but these changes will be based on a standard template in order to prevent Jira project setup becoming a major deliverable for projects.

Project creation and configuration

The first step in Jira configuration is creating a new project. Each project will have a number of settings automatically imported from the IDL template, but can be customised as needed to meet user needs. A project also has its own access permissions, and so can restrict the ability to edit and view project information to only the required staff.

Who do I need to contact to have a project created?
Creation of Jira projects is managed centrally by the Jira admin team

What information do I need to provide?

- Project name
- Project start and end date
- Staff requiring access, and access level required

Project operation and management

During project operation, delivery teams will update activities, tasks, and features which are assigned to them on their Jira boards. Project managers will be able to manage delivery, risks, and issues using BigPicture. Programme office staff will produce reports across the programme using EazyBI.

How do I kick off project operations?
When your project is created, it will not contain any information on deliverables, risks, or issues. The first activity required of project managers will be to populate their project with known deliverables. After this, work can be assigned to teams for completion.

Project closure

When projects are closed in the your agencies environment, access is removed from all users, and the project is put into a dormant state. The data of the project is preserved for archival purposes.

Who do I need to contact to have a project closed?
Closure of Jira projects is managed centrally by the Jira admin team

Access & Permissions

Access to the Jira web service, individual Jira projects, and BigPicture are all managed separately. A user must first request access to the Jira web service through ISP, and then request an access role from the Project Administrator. BigPicture access is managed centrally by the Jira admin team. EazyBI will automatically inherit a user's Jira project access.

Jira web service access

Like most non-standard tools on the DHS common desktop environment, Jira requires a user to request access via ISP. Your request must be approved by your line manager before access will be granted.

Further information on access within Jira can be found on the Jira SharePoint page.

https://oursites.internal.dept.local/communities/PPO/JIRA/SitePages/Access.aspx

The Jira web service can be accessed at https://jira-prod.csda.gov.au/

Jira Project Access

Access Level	Description
Project Administrator	A Project Administrator has access to configure their Jira Project. This is the highest level of access available to users. Ideally there would be no more than 2 to 3 people per project with this role.
Board Administrator	A Board Administrator has access to configure a particular Jira Board. The default is the Board creator, but other Board Administrators can be added manually.
Sprint Administrator	A Sprint Administrator has the access to the functions required to set up and manage a sprint for the project. This role should be limited to the scrum master and their back-up.
Team Member	Team Member is the standard level user access. This access allows a user to create, edit, and manage Issues within their Jira Project.
Reviewer	Reviewer is a basic level of access that allows a project collaborator to view and comment on Issues within a Jira Project. This level is commonly used when external parties are working on dependencies, and need a view of the work within your Jira Project.
Read Only	Read Only is a basic level of access that allows a user to only view issues and there is no ability to update, move or make comments on issues. It is a view only access.

BigPicture Access

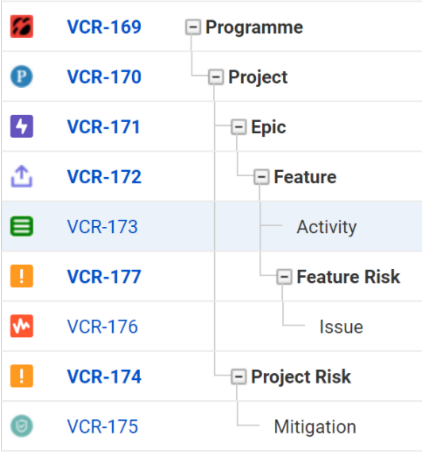
Access to Big Picture is managed separately to Jira access. Access to BigPicture is managed centrally by the Jira admin team.

Access Level	Description
Team Member	Able to manage most of the BigPicture functionality associated with their project.
Read Only	Able to view a project in BigPicture.

Default Issue Hierarchy

The Issue Hierarchy determines parent/child relationships between Issues in Big Picture. It is automatically generated by the links that are created in Issues. For example, if a Feature has the 'belongs to Epic' link, the feature will appear under that Epic in Big Picture.

Hierarchy



VCR-169	Programme
VCR-170	Project
VCR-171	Epic
VCR-172	Feature
VCR-173	Activity
VCR-177	Feature Risk
VCR-176	Issue
VCR-174	Project Risk
VCR-175	Mitigation

The Hierarchy

Pictured on the left is the Big Picture issue hierarchy.
The hierarchy controls how Jira issues are organised in the Gantt view. Programmes exist at the top level, and can have multiple projects underneath them. Projects then have multiple epics for delivery, and epics are broken down into multiple features, etc.
To function correctly, the hierarchy requires that issues be correctly linked together.

Links

Definition

A link is a connection between two items in Jira. Links can be vertical (parent/child) or horizontal (relationships, e.g. dependencies). Vertical links are used to maintain the Big Picture Issue Hierarchy.

Usage

The type of link used between Jira issues will affect the way the relationship between those issues is displayed in Big Picture. Link types are generally in pairs, e.g. ZEN *is programme for* NEO, NEO *belongs to programme* ZEN.

Vertical Links	Horizontal Links
Belongs to Parent	Blocks
Is Parent for	Is blocked by
	Is related to
	Is dependent on

Creating Epics

Preparation of an epic often has a different process than requirements themselves. A ‘Portfolio Kanban’ is recommended for the preparation of epics. A separate Kanban board with multiple statuses exists on which the momentum of the epic realization is transparently displayed. This creates space for regular meetings of a small team preparing requirements ahead and continuous improvement of epic details.

Definition

An Epic is a set of requirements that together deliver some business value and touch the same portion of the service, either functional or logical.

Naming Convention

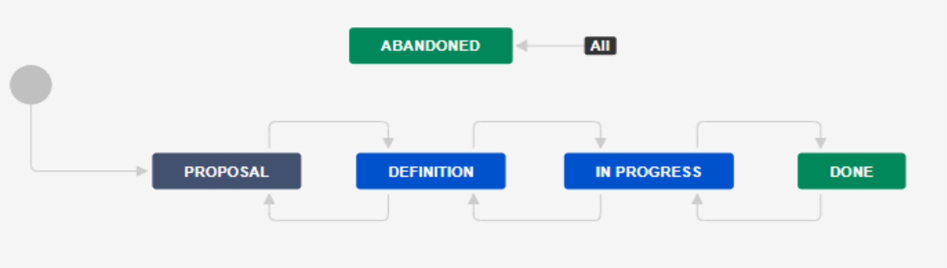
Standardised naming convention for Epics:

PROJECT-<Tranche>-<Epic Title>

NEO-Y4-CMS

Workflow

The below diagram illustrates how epics move through their workflow. The statuses and transitions have been standardised and begin with ‘*Proposal*’. Once the epic is approved it can progress through to ‘*Definition*’, ‘*In Progress*’ and ‘*Done*’. If the epic not approved or not required it can be ‘Abandoned’.



Fields

Field	Description
Assignee	The person responsible for managing the delivery of the epic.
Attachment	External files attached to the epic. Most file types can be attached to Jira issues, e.g. .doc, .pdf, .xls, etc.
Business Benefit	The anticipated value of the Epic to the customer/business.
Component/s	Used for grouping work according to impacted components, e.g. DB, Web Service, etc.
Cost	The projected cost of the epic.
Description	The description of the epic.
Fix Version/s	Used to record information about programme increments. If an epic is delivered across multiple PI’s, this information can be recorded in this field.
Labels	Used to tag epics with search terms to assist with finding information that shares labels.
Linked Issues	Used to create links between epics, and from epics to other issue types such as features, project, or risks.
Priority	The relative priority of the epic, e.g. Highest/High/Medium, etc.
Reporter	The person accountable for the delivery of the epic. This will generally be the SRO.
Source	The origin point of the epic, e.g. Email, Front Door, Direct engagement, SES, Costing.
Start Date/End Date	The expected start and end date of the epic. This information is used to update the project Gantt chart.
Summary	A brief summary of the epic.
Title	The name of the epic.

Creating Features

When epics are broken down into specific deliverables, these deliverables are referred to as 'features'. A feature is a piece of work which will eventually be delivered into production as part of a release, and it should provide some benefit to the business. Features have complex workflows because they require development and testing and have a large impact on the overall environment.

Definition

A Feature is a service that fulfils a stakeholder need. Each feature includes a benefit hypothesis and acceptance criteria, and is sized or split as necessary to be delivered by a single Agile Release Train (ART) in a Program Increment (PI).

Naming Convention

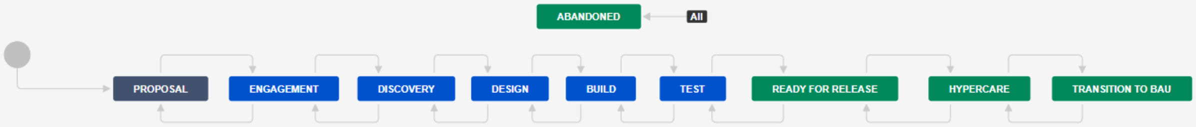
Standardised naming convention for Features:

<Epic Title>-<Feature Name>

CMS – Partner Consent

Workflow

The below diagram illustrates how features move through their workflow. The statuses and transitions have been standardised and begin with ‘*Proposal*’. Once the feature is approved it can progress through the rest of its workflow. If the feature not approved or not required it can be ‘*Abandoned*’.



Fields

Field	Description
Assigned Team	The team that the feature is currently assigned to.
Assignee	The person responsible for managing the delivery of the feature.
Attachment	External files attached to the feature. Most file types can be attached to Jira issues, e.g. .doc, .pdf, .xls, etc.
Business Benefit	The anticipated value of the feature to the customer/business.
Change ID	The ID of the Service Manager change record that corresponds with the feature.
Component/s	Used for grouping work according to impacted components, e.g. DB, Web Service, etc.
Cost	The projected cost of the feature.
Description	The description of the feature.
Fix Version/s	Used to record information about programme increments. If a feature is delivered across multiple PIs, this information can be recorded in this field.
Labels	Used to tag features with search terms to assist with finding information that shares labels.
Linked Issues	Used to create links between features, and from features to other issue types such as epics, project, or risks.
Original Estimate/Remaining Estimate	Used for tracking the number of hours required to deliver the feature.
Priority	The relative priority of the feature, e.g. Highest/High/Medium, etc.
Reporter	The person accountable for the delivery of the feature.
Source	The origin point of the feature, e.g. Email, Front Door, Direct engagement, SES, Costing.
Start Date/End Date	The expected start and end date of the feature. This information is used to update the project Gantt chart.
Story Points	The relative size of the feature.
Summary	A brief summary of the feature.
Title	The name of the feature.

Project Activities and Tasks

Tasks are items which are created by Project Managers, Scrum Masters, and Team Members in order to assist with their day-to-day work, but which do not need to be tracked by the overall programme. Examples include setting up meetings, completing performance reviews, and creating group mailboxes. Tasks can be created for any purpose and will not be included in progress reports.

Activities are similar to tasks, but are automatically generated and linked to a parent. For example, when a feature is put into the testing phase, it will spawn activities for SIT, PIT, UAT, etc.

Definition

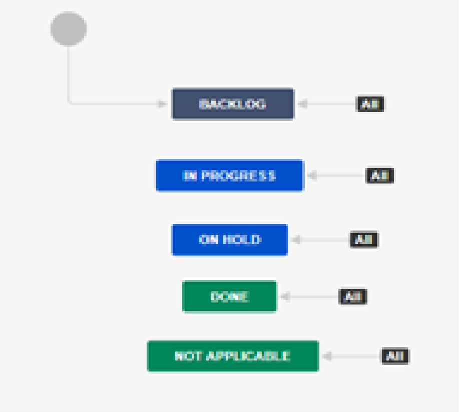
An activity or task is the smallest unit of work that can be registered. These usually are items that can be delivered within hours or 1-2 days.

Naming Convention

Standardised naming convention
for activities and tasks:
<Feature Name>-<Task Name>
Partner Consent – Testing

Workflow

The Task workflow is for manually added items. These could be items that contribute to the delivery of a project or ad-hoc items that need to be tracked by the team. Tasks can be added as dependencies for features or epics if required or kept as individual items.



Fields

Field	Description
Assignee	The person responsible for managing the delivery of the activity or task.
Attachment	External files attached to the activity or task. Most file types can be attached to Jira issues, e.g. .doc, .pdf, .xls, etc.
Component/s	Used for grouping work according to impacted components, e.g. DB, Web Service, etc.
Description	The description of the activity or task.
Fix Version/s	Used to record information about programme increments. If an activity or task is delivered across multiple PIs, this information can be recorded in this field.
Labels	Used to tag activities or tasks with search terms to assist with finding information that shares labels.
Linked Issues	Used to create links between activities or tasks, and from activities or tasks to other issue types such as features, project, or risks.
Original Estimate/Remaining Estimate	Used for tracking the number of hours required to deliver the activity or task.
Priority	The relative priority of the activity or task, e.g. Highest/High/Medium, etc.
Reporter	The person accountable for the delivery of the activity or task.
Start date/End date	The expected start and end date of the feature. This information is used to update the project Gantt chart.
Summary	A brief summary of the activity or task.
Title	The name of the activity or task.

Project Releases

Project release items are used to put a number of changes into the production environment. Your agencies Release Management team will define release windows for a number of different release types (Major, Infrastructure, Problem Only) on their release calendar. Projects should create release items for the releases they are targeting to show what will be deployed.

Definition

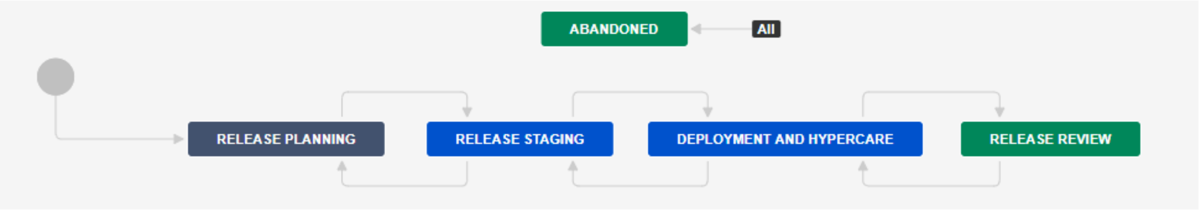
The process leading up to and following the deployment of features into the production environment. To be accepted, a programme must have completed the Design for Run Framework (DRF).

Naming Convention

Standardised naming convention for Releases:
<Release Type & Number>-<Project Name>
Soft Release 01 – NEO

Workflow

The Release workflow follows the Agency's release process.
Features, Epics, Tasks, and Activities can all be linked to a release to show what will be delivered in the release.



Fields

Field	Description
Assignee	The person responsible for managing the delivery of the release.
Attachment	External files attached to the feature. Most file types can be attached to Jira issues, e.g. .doc, .pdf, .xls, etc.
Change ID	The ID of the Service Manager change record that corresponds with the release.
Component/s	Used for grouping work according to impacted components, e.g. DB, Web Service, etc.
Description	The description of the release.
Labels	Used to tag releases with search terms to assist with finding information that shares labels.
Linked Issues	Used to create links between releases, and from releases to other issue types such as features, project, or risks.
Priority	The relative priority of the release, e.g. Highest/High/Medium, etc.
Release Date	The date the release window is scheduled to open.
Release Type	The type of release, e.g. major, infrastructure, problem only.
Reporter	The person accountable for the delivery of the release.
Summary	A brief summary of the Release.
Title	The name of the release.

Design for Run Framework

NOTE: This section is interchangeable with your organisations change and release management procedures. This process below can also be removed if you are a small organisation and you don’t have lots of competing released throughout the year however, some sort of release governance is good to have in place to track from a programme governance perspective.

The Design for Run Framework (DRF) is a requirement for programmes to improve the quality of releases. When a DRF item is created, it will spawn activities for all of the documents and stage gates that are required for the project to be able to release changes. This is intended to assist project managers to allocate time to DRF activities. The DRF checklist must also be completed on the release management intranet page. Examples of DRF activities include architectural documentation, testing strategy, and knowledge management.

Definition

A checklist of required activities which a project must complete in order to be able to release changes into the production environment.

Naming Convention

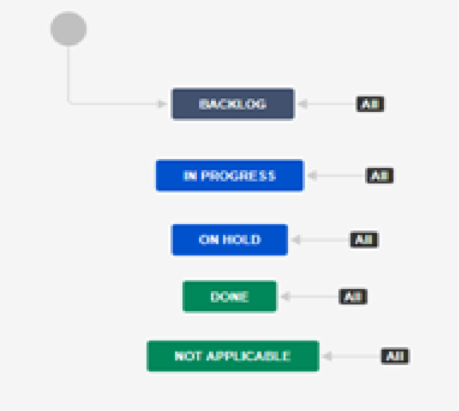
Standardised naming convention for activities and tasks:

<Programme Name>-DRF

ZEN – DRF

Workflow

The DRF workflow allows for the tracking of the status of the overall DRF completion task. In order to move the DRF item into the ‘Done’ phase, all linked DRF activities must be completed.



Fields

Field	Description
Assignee	The person responsible for managing the delivery of the activity or task.
Attachment	External files attached to the activity or task. Most file types can be attached to Jira issues, e.g. .doc, .pdf, .xls, etc.
Component/s	Used for grouping work according to impacted components, e.g. DB, Web Service, etc.
Description	The description of the activity or task.
Labels	Used to tag activities or tasks with search terms to assist with finding information that shares labels.
Linked Issues	Used to create links between activities or tasks, and from activities or tasks to other issue types such as features, project, or risks.
Priority	The relative priority of the activity or task, e.g. Highest/High/Medium, etc.
Reporter	The person accountable for the delivery of the activity or task.
Start date/End date	The expected start and end date of the feature. This information is used to update the project Gantt chart.
Summary	A brief summary of the activity or task.
Title	The name of the activity or task.

Risk Management Module

The risk module is used to assess risk probability and consequence, and show your risks on the heat map. The risks module consists of two main elements:

- Customizable risk heat map
- Customizable risk list (register)

The dimensions of the heat map depend on the number of selected options. The current dimension is 5x5, and it is the recommended size because it maps to the organisational dimensions.

Definition

Risk is the possibility of an event or activity preventing a programme/project/team from achieving its outcomes or objectives.

Naming Convention

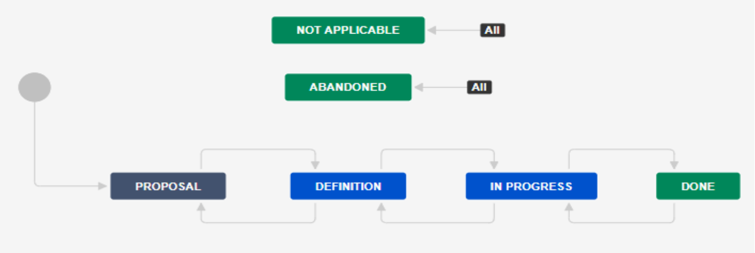
Standardised naming convention for risks:

R####.<Risk Name>

R0001. Lack of communication may cause lack of clarity and confusion.

Workflow

The below diagram illustrates the risks workflow. Risks can be raised at the programme, project or activity/task level. Once a new risk is proposed it can be assessed to ensure the it is not a duplicate and is well defined. Once 'In Progress', it can be managed and tracked until it can be closed.



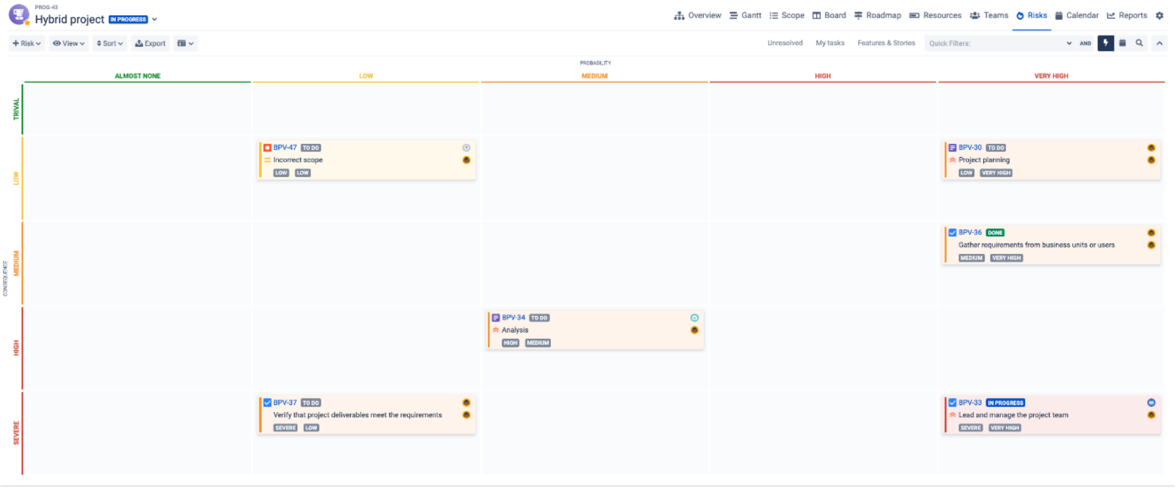
Fields

Field	Description
Areas	The areas that will be affected if the risk occurs, e.g. reputation, project delivery.
Assignee	The person responsible for managing the risk.
Description	The description of the risk.
Expected Resolution Date	The date the risk is expected to be resolved.
Impact	The organisational impact that will happen if the risk occurs. This is prior to the effect of any mitigations.
Level	The level at which the risk exists, e.g. programme, project, team.
Next Review Date	The date the risk is next due to be reviewed.
Reporter	The person accountable for the management of the risk.
Residual Risk Impact	The risk impact that remains once existing mitigations are accounted for.
Residual Risk Probability	The risk probability that remains once existing mitigations are accounted for.
Residual Risk Rating	The rating of the risk once existing mitigations are accounted for.
Response Type	The decision that has been taken on how to respond to the risk, i.e. mitigate, investigate, transfer, avoid, accept.
Risk Probability	The probability of the risk occurring. This is prior to the effect of any mitigations.
Risk Rating	The risk rating, as determined by the risk impact and risk probability. This is prior to the effect of any mitigations.
Summary	A brief summary of the risk.
Treatment Effectiveness Assessment	The assessment of how effective the mitigations are for controlling the risk.

Risk Management (Cont.)

Risk Heat Map

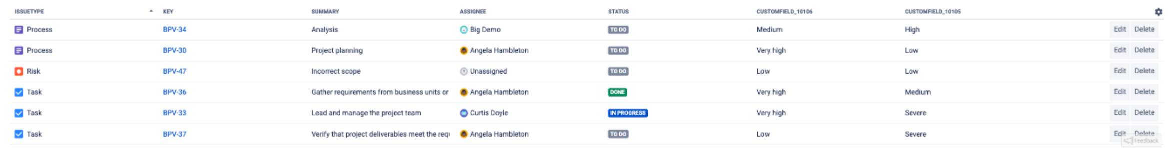
The below images is an example of a risk heat map. Risks can be entered by clicking onto the corresponding area on the heat map and selecting ‘Create New Issue’. Proceed by filling in the details for your risk, and finish by clicking on the blue ‘Create’ button.



	ALMOST NONE	LOW	MEDIUM	HIGH	VERY HIGH
TRIVIAL					
LOW		BPV-47 TO DO Incorrect scope LOW LOW			BPV-30 TO DO Project planning LOW VERY HIGH
MEDIUM					BPV-36 DONE Gather requirements from business units or users MEDIUM VERY HIGH
HIGH			BPV-34 TO DO Analysis HIGH MEDIUM		
SEVERE		BPV-37 TO DO Verify that project deliverables meet the requirements SEVERE LOW			BPV-33 IN PROGRESS Lead and manage the project team SEVERE VERY HIGH

Risk List (Register)

The Risk Register is located below the heat map (if heat map is enabled). Fields can be added or removed and filters can be applied to show only the risks you want to see. For example, project managers may want to only view risks listed for their project and not the entire programme.



ISSUETYPE	KEY	SUMMARY	ASSIGNEE	STATUS	CUSTOMFIELD_10106	CUSTOMFIELD_10105	
Process	BPV-34	Analysis	Big Demo	TO DO	Medium	High	Edit Delete
Process	BPV-30	Project planning	Angela Hambleton	TO DO	Very high	Low	Edit Delete
Risk	BPV-47	Incorrect scope	Unassigned	TO DO	Low	Low	Edit Delete
Task	BPV-36	Gather requirements from business units or	Angela Hambleton	DONE	Very high	Medium	Edit Delete
Task	BPV-33	Lead and manage the project team	Curtis Doyle	IN PROGRESS	Very high	Severe	Edit Delete
Task	BPV-37	Verify that project deliverables meet the requ	Angela Hambleton	TO DO	Low	Severe	Edit Delete

Issue Management

Issues are managed in Jira using the risk module, which is used to assess risk probability and consequence, and show risks on a heat map. The risks module consists of two main elements:

- Customizable risk heat map
- Customizable issues list (register)

The dimensions of the heat map depend on the number of selected options. The current dimension is 5x5, and it is the recommended size because it maps to the organisational dimensions.

Definition

An issue can be defined as an unplanned event that has happened, which requires management actions. In other words, an issue is a risk that has been realised.

Naming Convention

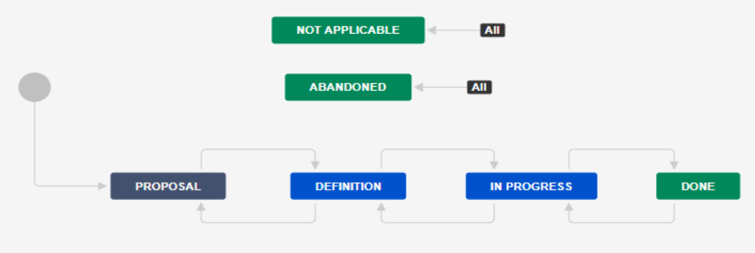
Standardised naming convention for issues:

I####.<Issue Name>

I0001. Lack of testing resources has resulted in testing not finishing on time

Workflow

The below diagram illustrates the issues workflow. Issues can be raised at the programme, project or activity/task level. Once a new issue is proposed it can be assessed to ensure the it is not a duplicate and is well defined. Once 'In Progress', it can be managed and tracked until it can be closed.



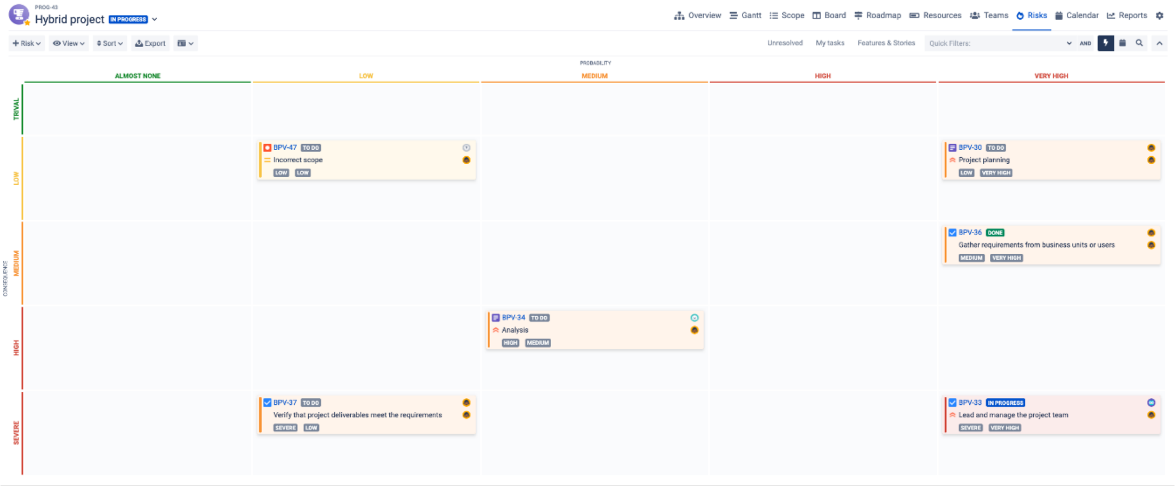
Fields

Field	Description
Areas	The areas affected by the issue, e.g. reputation, project delivery.
Assignee	The person responsible for managing the issue.
Description	The description of the issue.
Expected Resolution Date	The date the issue is expected to be resolved.
Impact	The impact of the issue.
Level	The level at which the risk exists, e.g. programme, project, team.
Next Review Date	The date the risk is next due to be reviewed.
Remediation Plan	The plan for how the issue will be resolved.
Reporter	The person accountable for the management of the issue.
Summary	A brief summary of the issue.
Title	The name of the issue.

Issue Management (Cont.)

Issue Heat Map

The below images is an example of a issue heat map. Issues can be entered by clicking onto the corresponding area on the heat map and selecting ‘Create New Issue’. Proceed by filling in the details for your issue, and finish by clicking on the blue ‘Create’ button.

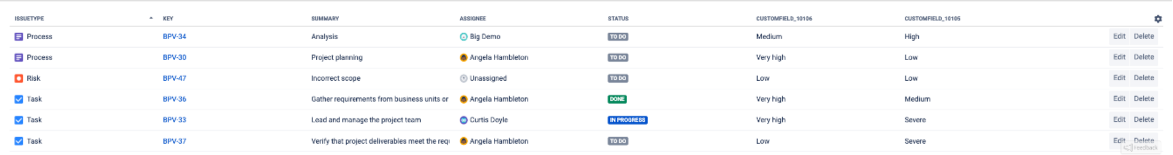


PROBABILITY

CONSEQUENCE	ALMOST NONE	LOW	MEDIUM	HIGH	VERY HIGH
TRIVAL					
LOW		BPV-47 TO DO Incorrect scope LOW LOW			BPV-30 TO DO Project planning LOW VERY HIGH
MEDIUM					BPV-36 DONE Gather requirements from business units or users MEDIUM VERY HIGH
HIGH			BPV-34 TO DO Analysis HIGH MEDIUM		
SEVERE		BPV-37 TO DO Verify that project deliverables meet the requirements SEVERE LOW			BPV-33 IN PROGRESS Lead and manage the project team SEVERE VERY HIGH

Issue List (Register)

The Issue Register is located below the heat map (if heat map is enabled). Fields can be added or removed and filters can be applied to show only the issues you want to see. For example, project managers may want to only view issues listed for their project and not the entire programme.



ISSUETYPE	KEY	SUMMARY	ASSIGNEE	STATUS	CUSTOMFIELD_10106	CUSTOMFIELD_10105	
Process	BPV-34	Analysis	Big Demo	TO DO	Medium	High	Edit Delete
Process	BPV-30	Project planning	Angela Hambleton	TO DO	Very high	Low	Edit Delete
Risk	BPV-47	Incorrect scope	Unassigned	TO DO	Low	Low	Edit Delete
Task	BPV-36	Gather requirements from business units or	Angela Hambleton	DONE	Very high	Medium	Edit Delete
Task	BPV-33	Lead and manage the project team	Curtis Doyle	IN PROGRESS	Very high	Severe	Edit Delete
Task	BPV-37	Verify that project deliverables meet the requ	Angela Hambleton	TO DO	Low	Severe	Edit Delete

Mitigations

Mitigations, (also known as controls), can be created by any user and can be linked to single or multiple risks and issues at any level within a program.

Definition

A mitigation is an action that has been or will be taken to reduce the likelihood of a risk, or the risk's impact if it does occur.

Naming Convention

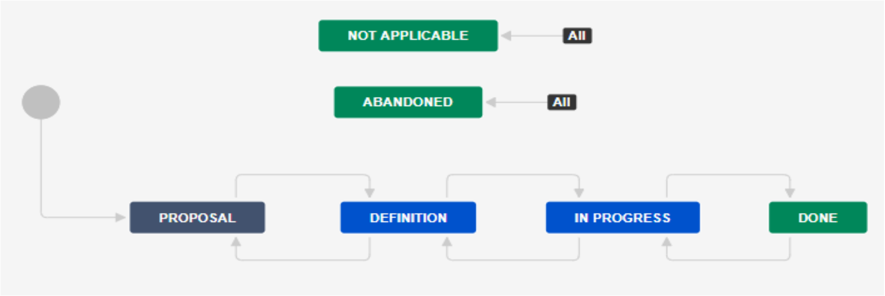
Standardised naming convention for mitigations:

M####.<Mitigation Name>

M0001. Lack of communication may cause lack of clarity and confusion.

Workflow

The below diagram illustrates the mitigations workflow. Mitigations can be created at the programme, project or activity/task level. Once a new mitigations is proposed it can be assessed to ensure the it is not a duplicate and is well defined. Once 'In Progress', it can be managed and tracked until it can be closed.



Fields

Field	Description
Assignee	The person responsible for managing the delivery of the mitigation.
Description	The description of the mitigation.
Next Review Date	The date the mitigation is next due to be reviewed.
Reporter	The person accountable for the management of the mitigation.
Summary	A brief summary of the mitigation.
Treatment Effectiveness Assessment	The assessment of how effective the mitigation is for controlling the risk.
Title	The name of the mitigation.

Creating Jira Boards

A board displays issues from one or more projects, giving you a flexible way of viewing, managing, and reporting on work in progress. Boards are available as either Scrum or Kanban. You can use a board that someone else has created, or create your own. You can create as many boards as you like. A project can have multiple boards, and a combination of Scrum, Kanban, and agility boards.

Definition (Scrum Board)

Scrum boards are used for teams that plan their work in sprints. Utilises the Jira sprint functionality and includes a backlog.

Definition (Kanban Board)

Kanban is based on the continuous delivery of work. Rather than plan iterations, the flow of work is constantly monitored to ensure that there are always tasks being worked on. This means that when tasks are completed, new tasks are pulled into work-in-progress.

Accessing a Board

In Jira Software, a board must belong to either a project, or a person—this is known as the board's *location*. A project can have multiple boards, even a combination of classic Scrum and Kanban boards, depending on the needs of your team.

To see all the boards in your Jira site:

1. Click in the search field (or press /) and choose **View all boards**.

To see boards that belong to you, choose **Your profile and settings** () > **Your boards**.

To access a board that belongs to your project:

1. Choose **Projects** in the navigation bar.
2. Select a project.
3. Navigate to the project's board (for Scrum, that'll be **Active Sprints**).

To switch boards in a project that has multiple boards:

1. Navigate to your project.
2. Select the board switcher, which you'll find under your project's name.

Board usage recommendations

Although any number of boards can be created in any structure for a Jira project, it is recommended to begin with the following configuration and adapt as needed:

Admin Board

A scrum board used by project administration for tracking tasks and activities that relate directly to general management of the project

Epic Board

A Kanban board used to tracking the status of all epics within the project

Feature Board

A Kanban board used to tracking the status of all features within the project

Release Board

A Kanban board used for tracking the status of releases and the completion of release activities.

Team Boards

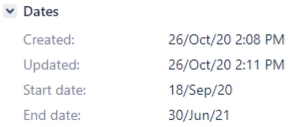
Scrum boards created for each team to track the status of assigned tasks and activities

Using Time Tracking

Time tracking in Jira enables the automated updating of the BigPicture Gantt chart for project managers, and forecasting of time to completion for features, activities, and tasks. Time tracking is done by updating fields within the Jira issue.

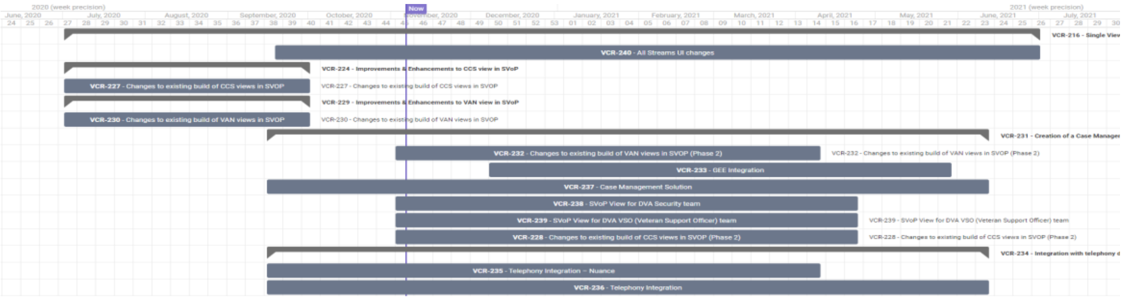
Start and end dates

Start and end dates are used primarily for updating the BigPicture Gantt chart. By estimating when work will begin and end on issues, a visual representation of the project's timeline of work will be automatically generated in Big Picture.



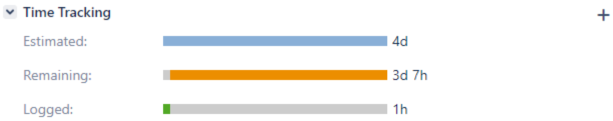
Dates

Created:	26/Oct/20 2:08 PM
Updated:	26/Oct/20 2:11 PM
Start date:	18/Sep/20
End date:	30/Jun/21


2020 (week precision)
2021 (week precision)
June, 2020
July, 2020
August, 2020
September, 2020
October, 2020
November, 2020
December, 2020
January, 2021
February, 2021
March, 2021
April, 2021
May, 2021
June, 2021
July, 2021
Now
VCR-216 - Single View
VCR-240 - All Streams UI changes
VCR-224 - Improvements & Enhancements to CCS view in SVoP
VCR-227 - Changes to existing build of CCS views in SVOP
VCR-227 - Changes to existing build of CCS views in SVOP
VCR-229 - Improvements & Enhancements to VAN view in SVoP
VCR-230 - Changes to existing build of VAN views in SVOP
VCR-230 - Changes to existing build of VAN views in SVOP
VCR-231 - Creation of a Case Manager
VCR-232 - Changes to existing build of VAN views in SVOP (Phase 2)
VCR-232 - Changes to existing build of VAN views in SVOP (Phase 2)
VCR-233 - GEE Integration
VCR-237 - Case Management Solution
VCR-238 - SVoP View for DVA Security team
VCR-239 - SVoP View for DVA VSO (Veteran Support Officer) team
VCR-239 - SVoP View for DVA VSO (Veteran Support Officer) team
VCR-228 - Changes to existing build of CCS views in SVOP (Phase 2)
VCR-228 - Changes to existing build of CCS views in SVOP (Phase 2)
VCR-234 - Integration with telephony
VCR-235 - Telephony Integration – Nuance
VCR-236 - Telephony Integration

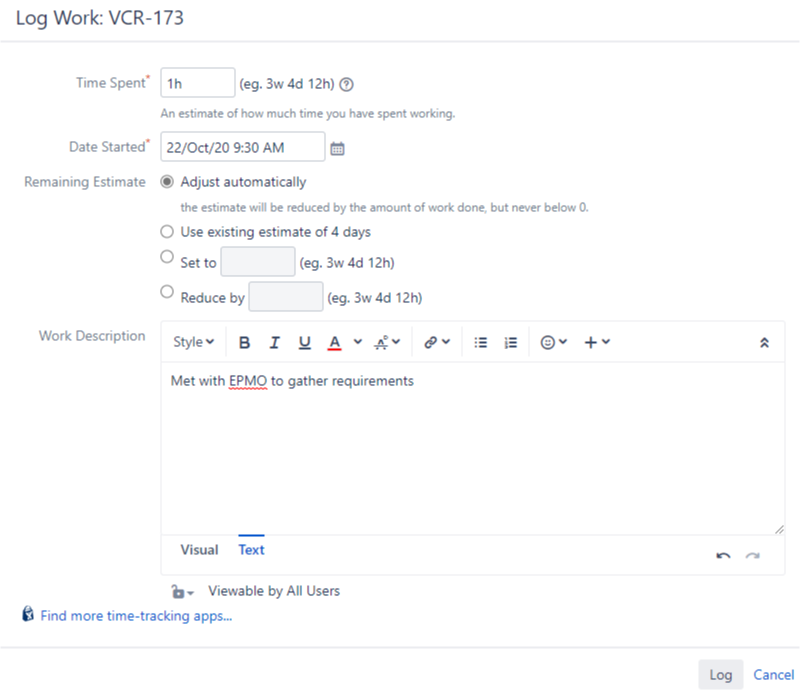
Time tracking

Time tracking is used to estimate the number of workhours remaining to complete a feature, activity, or task. When work is logged against an issue, it will automatically update the remaining time, which can be used to keep work on track.



Time Tracking

Estimated:	4d
Remaining:	3d 7h
Logged:	1h



Log Work: VCR-173

Time Spent* 1h (eg. 3w 4d 12h)

An estimate of how much time you have spent working.

Date Started* 22/Oct/20 9:30 AM

Remaining Estimate
- ● Adjust automatically

  the estimate will be reduced by the amount of work done, but never below 0.
- ○ Use existing estimate of 4 days
- ○ Set to (eg. 3w 4d 12h)
- ○ Reduce by (eg. 3w 4d 12h)

Work Description

Met with EPMO to gather requirements

Managing sprints and PI’s

Sprints and programme increments are the primary units of time for tracking delivery in agile projects. A programme increment is standardised to be 8 weeks (4 sprints) long. It will generally be required for projects within a programme to maintain a cadence with programme increments, so that they start and finish at the same time.

Managing programme increments

Jira does not have a native function for tracking and managing programme increments, and so a solution has been configured for the as part of this programme environment.

Jira issues for deliverables (epics, features, activities, tasks) have a field available, which is the ‘Fix Version/s’ field. The programme increment to which a deliverable belongs should be recorded in this field.

Definition

A Programme Increment (PI) is a period during which an Agile project plans and delivers features in the form of working, tested software and systems. PI’s are typically 8 weeks long.

Naming Convention

Standardised naming convention for Programme Increments:

<Project Tranche/Year>-<Project PI number>

ZEN Year 4 – PI1

Managing sprints

Sprints are managed with a native Jira capability by creating scrum boards for delivery teams. Sprints are at the very heart of scrum and agile methodologies, and getting sprints right will help your agile team ship better software with fewer headaches.

Sprints are started in the backlog of a scrum board. Sprint objectives are set at the beginning of the sprint, and at the end of the sprint will either be marked as completed, or carried forward.
Project managers should ensure that all delivery teams in their projects start and finish their sprints at the same time.

Definition

A sprint is a short, time-boxed period when a scrum team works to complete a set amount of work. Sprints are 2 weeks long by default.

Naming Convention

Standardised naming convention for Sprints:

<Project Tranche/Year>-<Project PI number>-<Team ID>-<Sprint Number>

ZEN Year 4 – PI1 – NEO02 – Sprint 3

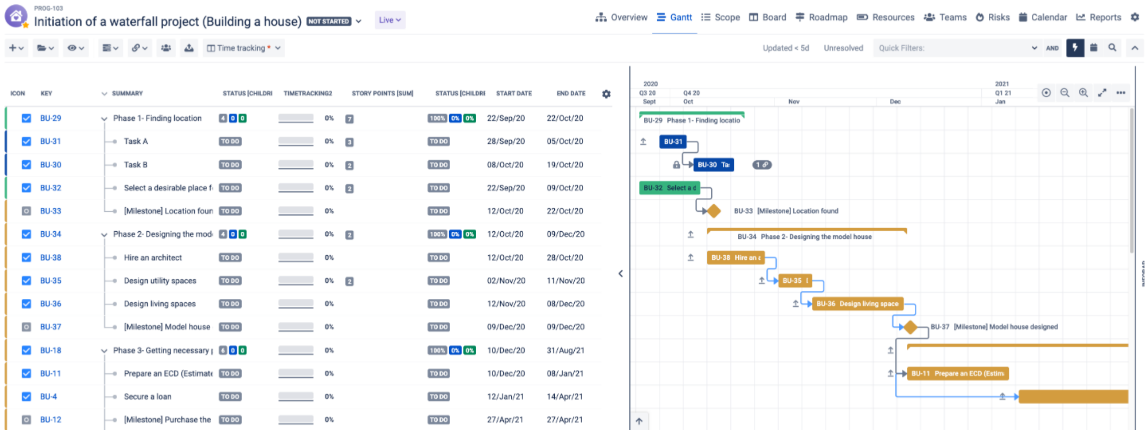
BigPicture Gantt View

The BigPicture Gantt module is all you need to manage your project or programme. Use it to prepare and visualize your project schedule or roadmap, monitor and control the execution, and generate reports by aggregating your task data or using advanced export features.

The Gantt module includes four key elements:

1. Task list (WBS) that presents almost any Jira or built-in fields as columns with aggregated data
2. Timeline with tasks and dependencies that visualizes your work items and includes auto-scheduling
3. Resources panel that shows your resources' workload
4. Infobar that highlights the most important information related to your project, e.g. Overdue tasks, Critical path, Dependencies, and Milestones

Use the Gantt to show your project schedule or to visualise your product roadmap. Gantt views can be created to show different information to different stakeholders. For example: a programme view can be created to summarise multiple projects alongside individual project views.



PROG-103

Initiation of a waterfall project (Building a house) NOT STARTED

Live

ICON	KEY	SUMMARY	STATUS [CHILDRI	TIMETRACKING2	STORY POINTS [SUM]	STATUS [CHILDRI	START DATE	END DATE
☑	BU-29	Phase 1- Finding location	4 0 0	0%	7	100% 0% 0%	22/Sep/20	22/Oct/20
☑	BU-31	Task A	TO DO	0%	3	TO DO	28/Sep/20	05/Oct/20
☑	BU-30	Task B	TO DO	0%	2	TO DO	08/Oct/20	19/Oct/20
☑	BU-32	Select a desirable place f	TO DO	0%	2	TO DO	22/Sep/20	09/Oct/20
▣	BU-33	[Milestone] Location foun	TO DO	0%		TO DO	12/Oct/20	22/Oct/20
☑	BU-34	Phase 2- Designing the mod	4 0 0	0%	2	100% 0% 0%	12/Oct/20	09/Dec/20
☑	BU-38	Hire an architect	TO DO	0%		TO DO	12/Oct/20	28/Oct/20
☑	BU-35	Design utility spaces	TO DO	0%	2	TO DO	02/Nov/20	11/Nov/20
☑	BU-36	Design living spaces	TO DO	0%		TO DO	12/Nov/20	08/Dec/20
▣	BU-37	[Milestone] Model house	TO DO	0%		TO DO	09/Dec/20	09/Dec/20
☑	BU-18	Phase 3- Getting necessary	6 0 0	0%		100% 0% 0%	10/Dec/20	31/Aug/21
☑	BU-11	Prepare an ECD (Estimat	TO DO	0%		TO DO	10/Dec/20	08/Jan/21
☑	BU-4	Secure a loan	TO DO	0%		TO DO	12/Jan/21	14/Apr/21
▣	BU-12	[Milestone] Purchase the	TO DO	0%		TO DO	27/Apr/21	27/Apr/21

Gantt Features

Feature	Description
Add task	Use this option to add tasks by: • Creating new tasks in the Host platform (the Host platform is the Jira instance you are currently using) • Cloning existing tasks
View	Change the view options to include more information in the Gantt chart or show additional features: • Layout - adjust the row height so that you can fit more more tasks on the screen and show larger portion of your schedule. You can also add grid lines to distinguish between dates. • Baselines - set project baselines to compare initial and actual schedules • Critical path - highlight tasks on the critical path that determine project duration • Period warning - show the position of parent tasks calculated based on its children tasks • Progress - show task progress directly on the taskbar
Dependency	Visualise both strong links and soft links
Filter	Add your favourite filters to the header and filter the list tasks to see only the items which you are interested in. There are two types of filters (quick filters and date range filters).
Infobar	Provides you more information about your tasks including milestones, overdue tasks, dependencies and critical paths.
Mini Map	Enable a mini map to navigate through the whole timeline with a single click.
Task Structure	Indent and outdent your tasks manually or move them up and down the list. The manual structure might be in conflict with the active structure builders in which case a warning will be displayed.

Creating Dependencies

Dependencies specify the relationships between tasks, milestones, and other items which can be presented on the timeline and can be displayed by the Gantt and Board type modules (Gantt and Board are the default module names used). By defining dependencies, you can not only automate task scheduling but also highlight relations between tasks without impacting the schedule. Keep in mind, that the items presented on the Gantt chart are system-wide and changing their dependencies might affect tasks in other Boxes or connected tools.

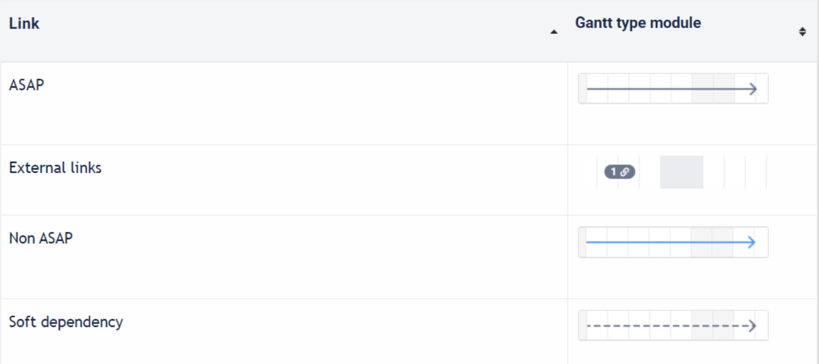
The Gantt module takes linking to the next level and you can use non-Jira links to define dependencies between Issues and non-issues, such as Projects, Versions, Components, Sprints and Backlog, Checklists, etc. You can visualize up to five different links. Almost any native Jira link or custom link can be synchronized.

The Board module dependencies are colour coded so that you can easily find the tasks which need your attention.

The strong dependencies between tasks impact the scheduling of those tasks (does not apply to Soft links). Linked tasks will push and pull each other in time, according to the properties of the dependency between them.

Displaying Dependency Links

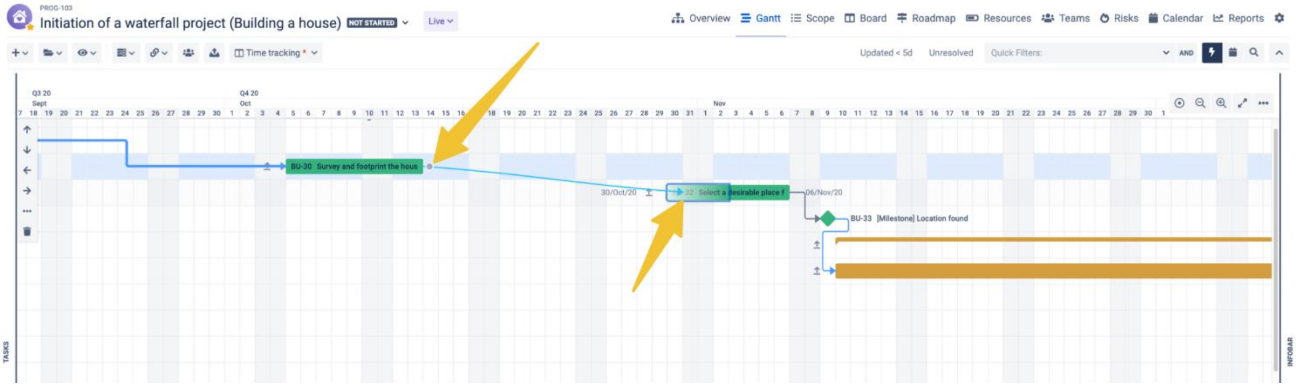
Depending on the business rules links will be displayed differently. For example, the links displayed using the Gantt module will display by default as per the below table:



Link	Gantt type module
ASAP	——→
External links	1 🔗
Non ASAP	——→
Soft dependency	- - - - - - - - -→

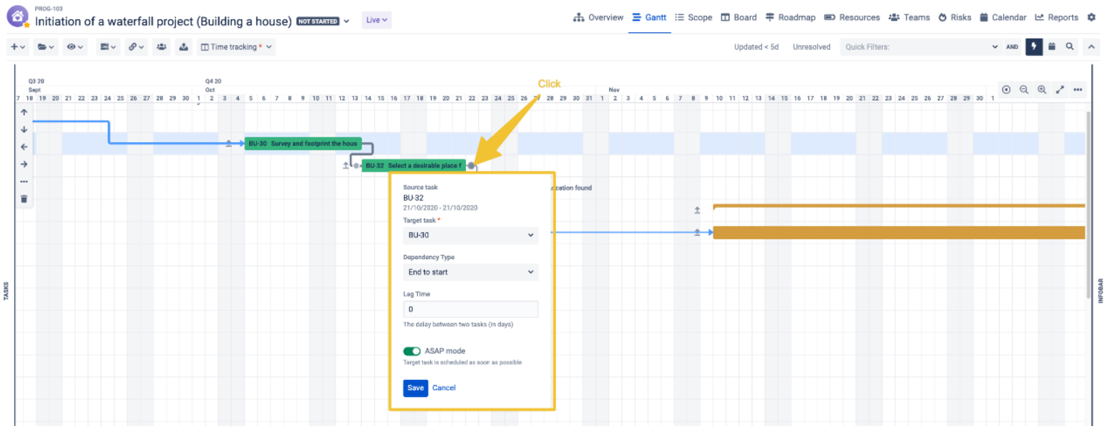
Creating Dependencies

You can create the dependencies using drag and drop or by clicking the rings (or dots) which appear when you hover over the task using the pointer. Alternatively, you can create the link using Jira or connected tools.



Creating Dependencies (Cont.)

You can also use the add link pop-up as show below:



Source task
BU-32
21/10/2020 - 21/10/2020

Target task *
BU-30

Dependency Type
End to start

Lag Time
0
The delay between two tasks (in days)

ASAP mode
Target task is scheduled as soon as possible

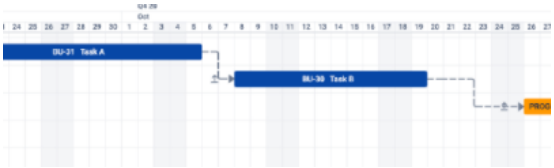
Save Cancel

Strong Links (Dependencies)

You can create the dependencies using drag and drop or by clicking the rings (or dots) which appear when you hover over the task using the pointer. Alternatively, you can create the link using Jira or connected tools.

Soft Links (Dependencies)

Soft links are just and information about a dependency between to tasks and have no scheduling impact. By default, Soft links are not visible as this type of link is dedicated for showing dependencies using the Board module. Such links are displayed using a dashed-line:

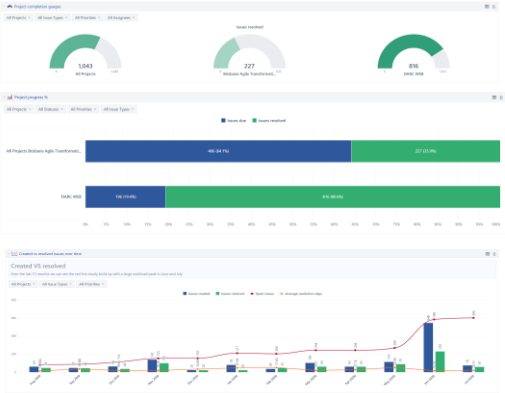


External Links (Dependencies)

External links show dependencies between tasks within the scope of different Boxes. Such a dependency might constrain and therefore the task period mode is set to "locked":

EazyBI Dashboards

EazyBI allows users to build custom reports in Jira along with visualising and analysing Jira metrics. Users can instantly access all their data including that gained from workflows, projects, epics, stories, sub-tasks and custom fields. There are a series of pre-build charts and dashboards that are initially available but as users learn the tool and its capabilities they can modify or create their own charts and dashboards for reporting.

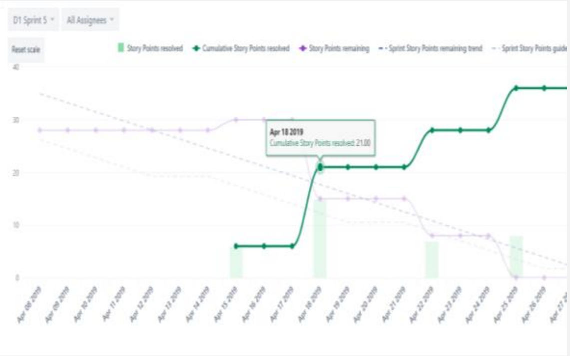


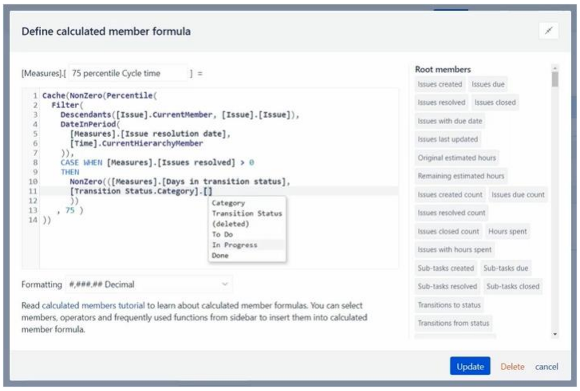
Custom Reports, Charts, and Dashboards

Create custom reports, charts, and dashboards with an easy-to-use drag-and-drop report builder. Create new tables, charts, reports, and dashboards with just a couple of clicks. Quickly discover new insights and opportunities with all your data at your fingertips.

Interactive Data Analysis and Visualization

Explore and analyze your data with an instant feedback. Start with a summary and dig into details to examine your business data with multi-dimensional analysis. Drill-in or across other dimensions right from the report. Find actionable insights, trends, and opportunities, make smart and data-driven decisions.


D1 Sprint 5
All Assignees
Reset scale
Story Points resolved
Cumulative Story Points resolved
Story Points remaining
Sprint Story Points remaining trend
Sprint Story Points guide
Apr 18 2019
Cumulative Story Points resolved: 21.00
40
30
20
10
0



Define calculated member formula

[Measures].[75 percentile Cycle time] =

```
Cache(NonZero(Percentile(
  Filter(
    Descendants([Issue].CurrentMember, [Issue].[Issue]),
    DateInPeriod(
      [Measures].[Issue resolution date],
      [Time].CurrentHierarchyMember
    )),
    CASE WHEN [Measures].[Issues resolved] > 0
    THEN
      NonZero(([Measures].[Days in transition status],
      [Transition Status.Category].[]
      ))
   , 75 )
))
```

Formatting #,###.## Decimal

Read calculated members tutorial to learn about calculated member formulas. You can select members, operators and frequently used functions from sidebar to insert them into calculated member formula.

Powerful Calculations for Advanced Users

Go way beyond basic analysis by creating new measures and powerful calculations. Start with many predefined calculations or write your own using the built-in MDX editor with auto-complete and syntax highlighting. Perform multi-dimensional analysis and examine your business data in almost any way you need.

More Information

Detailed user guides and videos are available online for everything from how to create a chart to creating dashboards and calculated measures https://docs.eazybi.com/eazybi . You will also find best practice information for creating your own dashboards and reports here: https://docs.eazybi.com/eazybi/analyze-and-visualize/best-practices-for-report-creation .

Activities Index

Activity	Parent	Phase
DRF – Architecture	DRF	Backlog
DRF – Environments Management Plan	DRF	Backlog
DRF – Test Strategy	DRF	Backlog
DRF – Privacy Assessment	DRF	Backlog
DRF – Cyber Engagement	DRF	Backlog
DRF – Monitoring Planning	DRF	Backlog
DRF – Capacity Planning	DRF	Backlog
DRF – Availability Planning	DRF	Backlog
DRF – MI & OI Reports	DRF	Backlog
DRF – Data Governance	DRF	Backlog
DRF – Design Document – Architecture	DRF	Backlog
DRF – Design Document – Disaster Recovery	DRF	Backlog
DRF – Service Agreement/s	DRF	Backlog
DRF – High Level Testing Plan	DRF	Backlog
DRF – Test Status Report	DRF	Backlog
DRF – Configuration Management	DRF	Backlog
DRF – Service Catalogue Update	DRF	Backlog
DRF – Detailed Run Sheet	DRF	Backlog
DRF – Change Communications	DRF	Backlog
DRF – Knowledge Management	DRF	Backlog
DRF – Hypercare Arrangements	DRF	Backlog
DRF – Planning for Support	DRF	Backlog
DRF – Code Review	DRF	Backlog
BVT	Release	Deployment and Hypercare
TVT	Release	Deployment and Hypercare
Post-Implementation Review	Release	Release Review

Activities Index (Cont.)

Activity	Parent	Phase
Decommission Strategy	Epic	Definition
Risk Assessment	Epic	Definition
Communications Plan	Epic	Definition
High Level Design	Feature	Engagement
Risk Assessment	Feature	Engagement
UX Statement	Feature	Engagement
KPIs	Feature	Engagement
Prioritisation	Feature	Engagement
Schedule	Feature	Discovery
Architecture	Feature	Discovery
Dependency Mapping	Feature	Discovery
Environments Plan	Feature	Discovery
Data Migration Plan	Feature	Discovery
Detailed Design	Feature	Design
Prototype	Feature	Design
PIT	Feature	Test
SIT	Feature	Test
UAT	Feature	Test
PEN	Feature	Test
PST	Feature	Test
Benefits Measurement	Feature	Hypercare

Acronyms

Acronym	Description
PI	Program Increment
DRF	Design for Run Framework
UX	User Experience
PIT	Product Integration Testing
SIT	System Integration Testing
UAT	User Acceptance Testing
PST	Performance Stress Testing
PEN	Penetration Testing
ROAM	Resolved, Owned, Accepted, Mitigated
RTE	Release Train Engineer
MDT	Multi Disciplinary Team
BAU	Business As Usual
IDL	Integrated Delivery Landscape
WBS	Work Breakdown Structure