

JIRA RAID User Manual

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1 OBJECTIVE

The objective of this document is provide users with a ready reference for the Risk, Assumption, Issue & Dependency templates in JIRA and how the same can be used.



2 INTRODUCTION

Risks, Assumptions, Issues & Dependencies within a project are normally tracked using spreadsheets. We have implemented the RAID template in JIRA so that Project and Risk Managers can use this template as a dynamic tool to effectively record, analyze, monitor, manage and report project risks, assumptions, issues and dependencies.

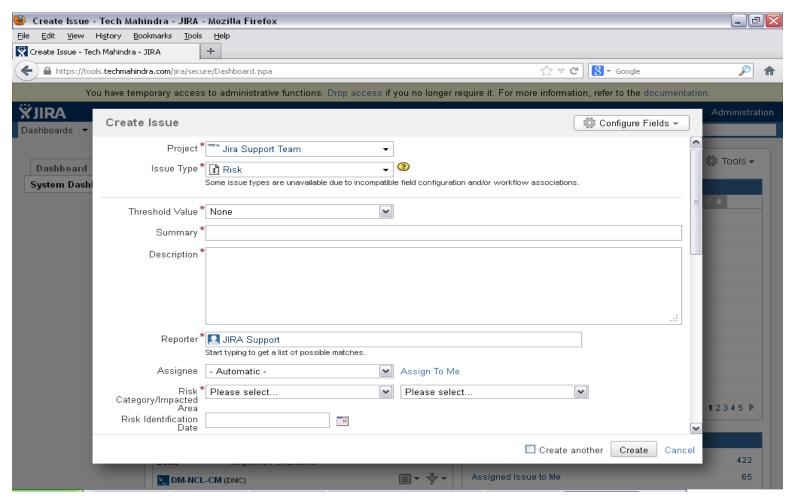
3 RISK ISSUE TYPE TEMPLATE

A Risk is any specific event which might occur and thus have a negative impact on a project or program.

The description of the various fields in the Risk Template is as follows:

3.1 CREATE ISSUE SCREEN





Threshold Value: This field determines the risk exposure thresholds that indicate when a risk becomes unacceptable and triggers the execution of a risk mitigation plan or a contingency plan. User will have to select the Threshold Value from the drop-down list.

Summary: Summary of the Risk reported.



Description: Clearly articulate the risk with the condition and the consequence.

Reporter: Person responsible for tracking and addressing the risk. By default the Username of the user who logs a risk will be populated in this field.

Assignee: Person responsible for resolving the risk. The Assignee can be selected from the drop-down list which includes names of all members of the project. If the Assignee name does not exist in the drop-down, then a request should be raised for adding the user in the project.

Risk Category/ Risk Impacted Area: This field give the mapping of risk categories with the risk sources. This is field is a cascaded select list.

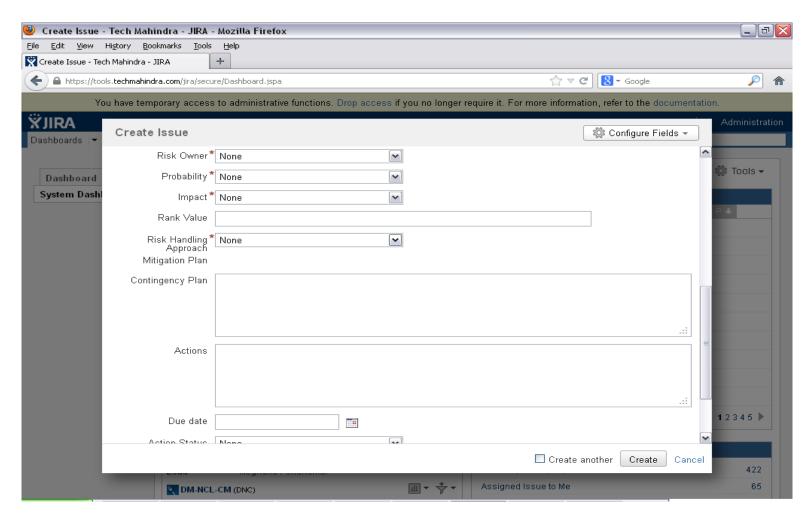
The following table illustrates a high-level classification of the risk categories and the risk sources it can be mapped to.

RISK-CATEGORY	RISK-SOURCE
People	Customers, End-users, Sponsors, Stakeholders, Personnel, Organization, Skills, Politics, Morale, Communication
Process	Deployment, Support, Mission and Goals, Decision Making, Project Characteristics, Budget Cost Schedule, Requirements, Design, Building, Testing
Technology	Security, Development/Test/Operational/Environment, Tools, Deployment, Support, Availability, Infrastructure
Environmental	Legal, Regulatory, Competition, Economic, Technology, Business, Organizational, Politics
External	Sub-Contractors/ Suppliers, Regulatory, Market, Weather, Customer



Risk Identification Date: Date when the risk was identified.





Risk Owner: Person who is responsible for all the risks. The Risk Owner can be selected from one of the following values in the drop-down list:

- Customer
- > TechM



Probability: How likely the risk event or condition is to occur. The Probability can be selected from one of the following values from the drop-down list:

- > High
- Medium
- > Low

Impact: Extent of what would happen if the risk materialized. The Impact can be selected from one of the following values from the drop-down list:

- > High
- Medium
- > Low

Rank: Rank of the risk based on risk exposure rating. This should be manually entered on each risk issue after the sorting of the risk exposure values in the issue navigator page.

E.g. the risk with the highest value for risk exposure will have the rank 1.

Risk Handling Approach: This field describes the approach followed for handling the risk. The Risk Handling Approach can be selected from one of the following values from the drop-down list:

- > Avoid : Changing the scope while still meeting the user's needs so that the risk is avoided
- > Transfer: Minimize the impact of the risk by transferring it to another project, team, organization or individual
- Mitigate: Mention the specific action plan to reduce the probability of occurrence of the risk and/or the impact of the risk; Risk mitigation plans are developed and implemented as needed to proactively reduce risks before they become issues
- > Accept: Live with the consequences if the risk were actually to occur. We accept the risk and take no further action.



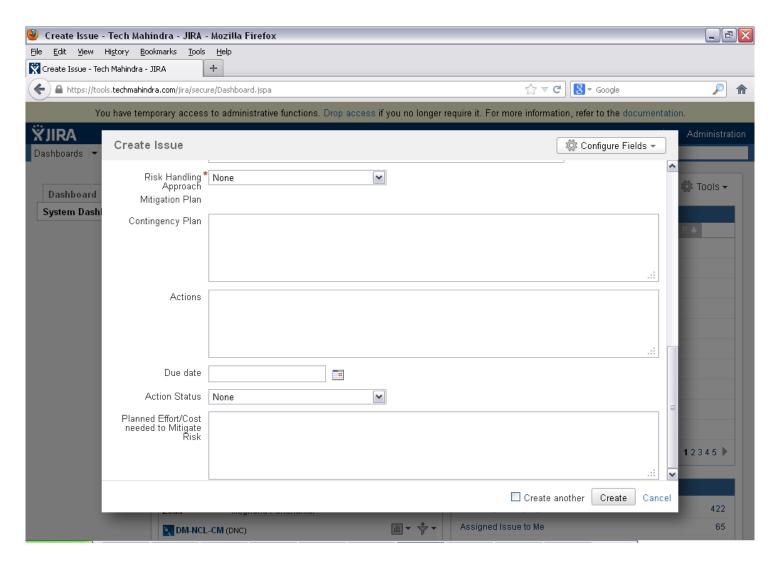
Mitigation Plan: Provide Mitigation Plan in this field if risk handling approach is mitigation. This field is to be enabled only if the Risk Handling Approach value is "Mitigate".

Contingency Plan: Provide Contingency plan if risk handling approach is mitigation or accept. Contingency Plan is mandatory if Risk Exposure value is greater than Threshold.

Action: Mention the action to be taken based on the risk handling approach e.g. mitigation actions, contingency planning actions.

Due Date: The date by which the Issue should be resolved. Due Date should be greater than the Risk Created date.





Action Status: This field indicates the status of the action taken. The Action Status can be one of the following values from the drop-down list:



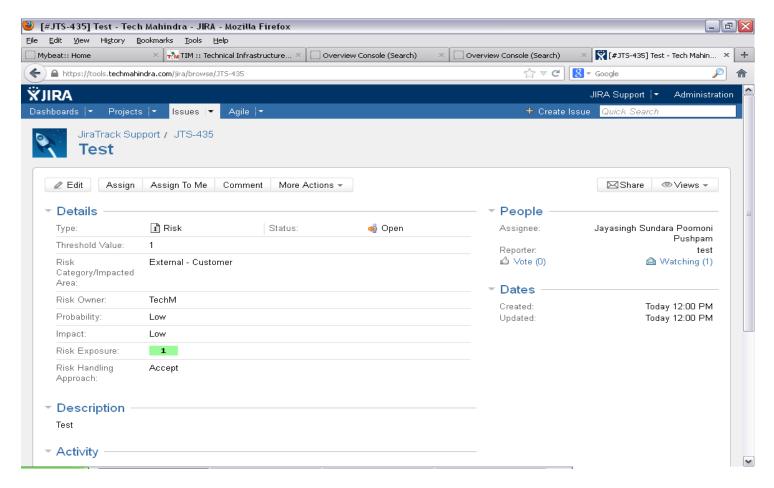
- > To Be Started
- > In Progress
- Completed

Risk Status: This is determined by the workflow steps.

Planned Effort/Cost needed to Mitigate Risk: Effort (in terms of Hours spent)/cost needed to mitigate specified risk.



3.2 VIEW ISSUE SCREEN AFTER REQUIREMENTS CAPTURED AND ISSUE CREATED



Risk Exposure: This is a calculated and non-editable field which will be displayed on the screen once the Risk issue type is created. This calculated field is based on the values selected for the Probability and Impact fields. The risk

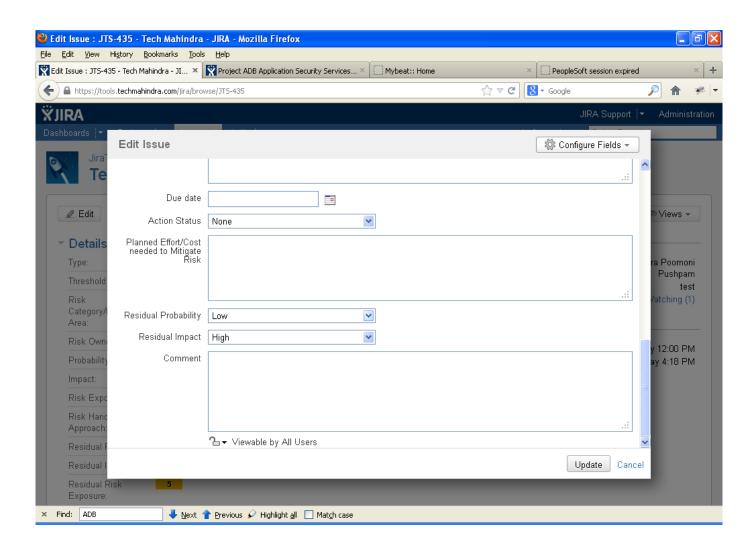


exposure values can be viewed in the Issue Navigator by adding a new column in the Issue Navigator and can be arranged in the descending order for assigning the rank.

Click on Edit to enter the Residual Probability and the Residual Impact.



3.3 EDIT ISSUE SCREEN





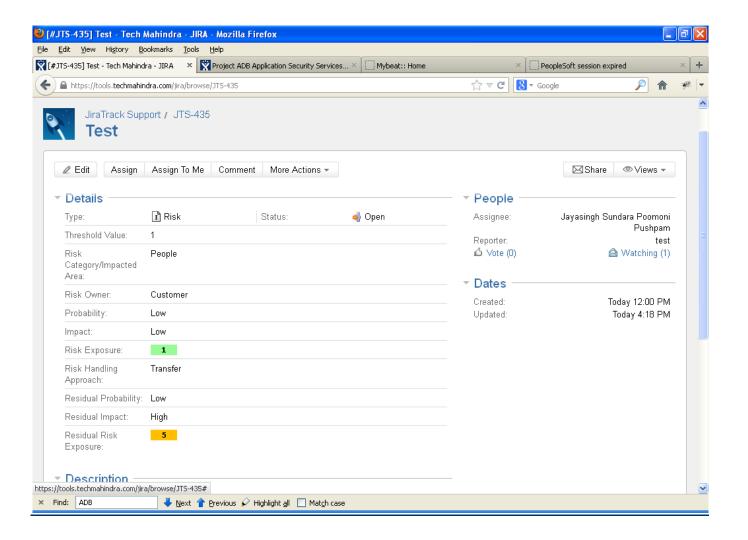
In Addition to the fields present in the Create Issue screen (Excluding Probability and Impact), the following fields need to be populated in the Edit Issue screen once the issue is created:

Residual Probability: This filed indicates the Risk Probability after implementing the identified risk action plan. This is a drop-down field which is editable and can be changed during the progress of the issue. This field will not be present at the time of the issue creation. The user should manually change the values after the issue is created by editing the issue. This value can be changed during the workflow cycle as well.

Residual Risk Impact: This field indicates the Risk Impact after implementing the identified risk action plan. This is a drop-down field which is editable and can be change during the progress of the issue. This field will not be present at the time of the issue creation. The user should manually change the values after the issue is created by editing the issue. This value can be changed during the workflow cycle as well.



3.4 VIEW ISSUE SCREEN AFTER EDITING ISSUE





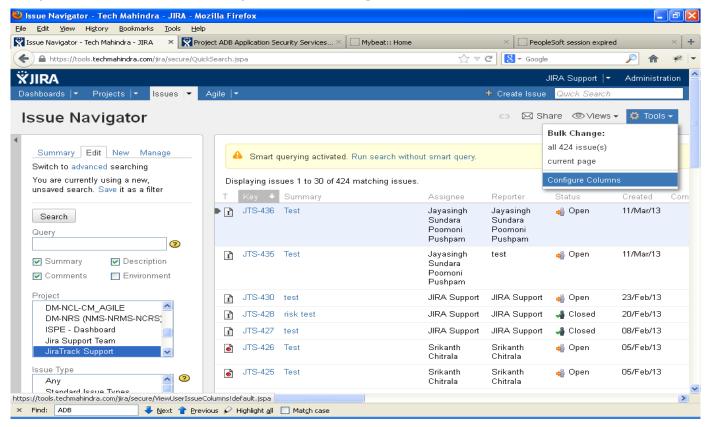
Residual Risk Exposure: This is a non-editable field whose value is calculated based on the values for the Residual Probability and Residual Impact fields. The Residual Risk Exposure values can be viewed in the view issue screen after the issue is edited. It can also be viewed in the issue navigator by adding the column in the issue navigator.



3.5 CUSTOMIZING OF ISSUE NAVIGATOR

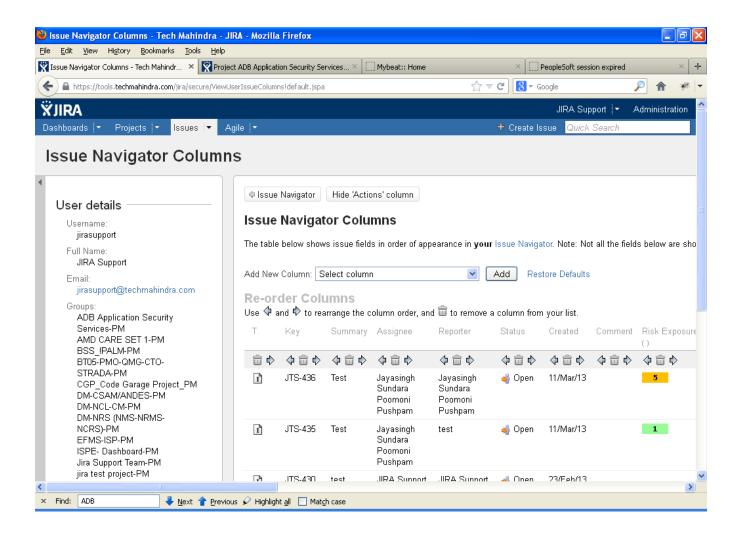
You can customize your Issue Navigator by choosing: which **columns** (i.e. issue fields) to display and how many **rows** (i.e. issues) to display.

> To customize the issue navigator: In the issue navigator page from the 'Tools' menu at the right of the screen (above the search results), select 'Configure Columns'.



> The following page will be displayed.



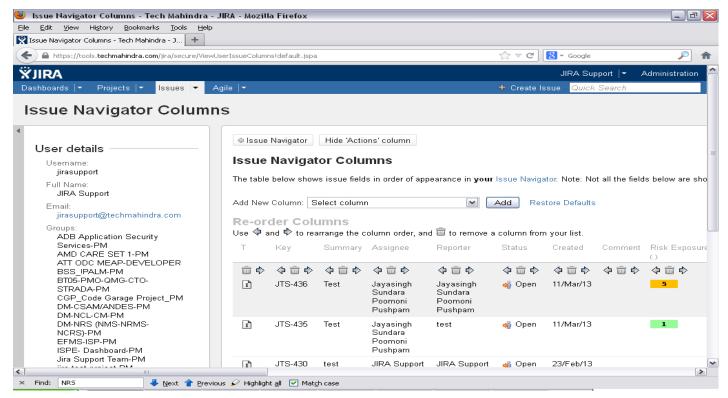


> To add a column to the list: Select the issue field name from the drop-down box titled 'Add New Column' and click the 'Add' button. The column will appear as the right-most column in the list.



You can then position the column where desired by using the arrow icons (In our case select Risk Exposure and Residual Risk Exposure)

After configuring the issue navigator columns and selecting the Filter from the dashboard, the issues will be displayed. Click on the Risk Exposure field as highlighted to set the risks in the descending order for Ranking the issues.



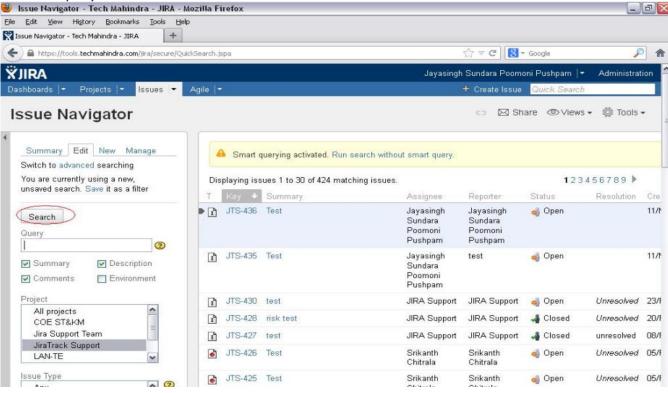
Once the Issues have been sorted, edit the issues to enter the rank into each issue.



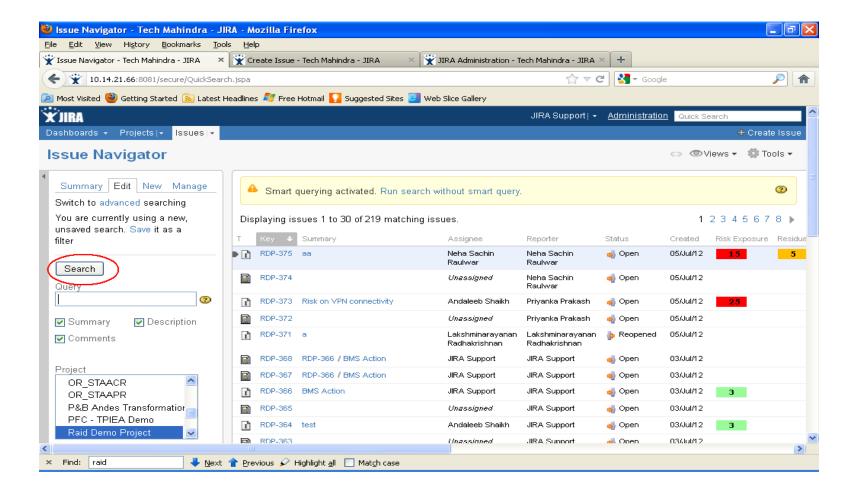
3.6 FOR CONFIGURING AUTO-GENERATED MAILS FROM JIRA ON VARIOUS TRIGGERS BASED ON USER ENTRY / BUSINESS RULES

There is RSS feed which the user should subscribe to after creation of the filter based on which the mail will be triggered to the user.

- > Create a filter for which you require the notifications.
- > Enter search to display all the filtered issues.

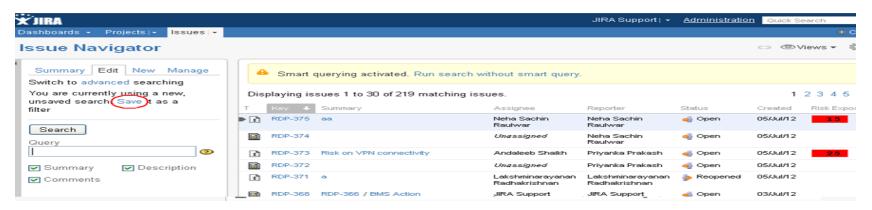




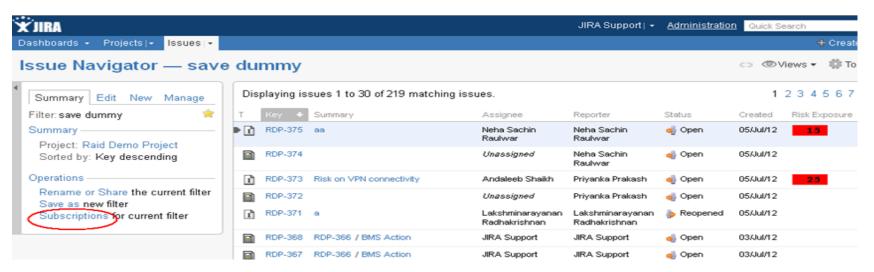




> Click on Save to save the filter created for future use.

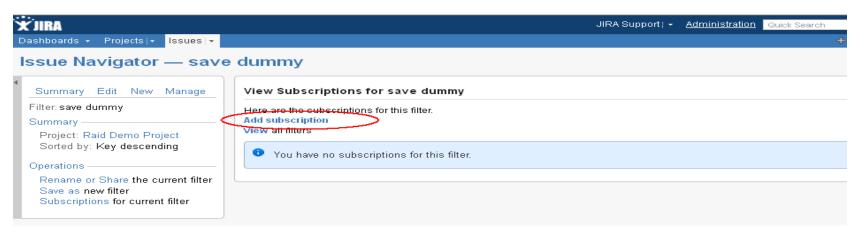


> The saved filter displays all the issues. Click on Subscriptions for getting notified for the filter created.

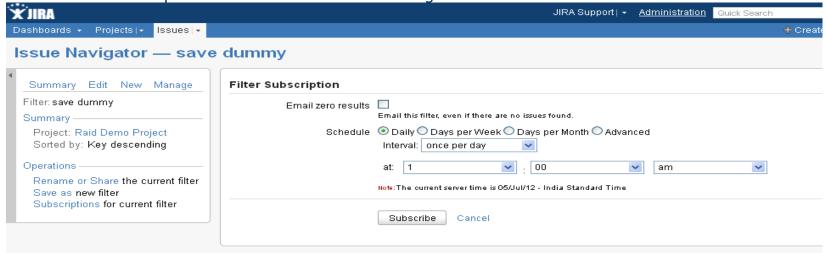




Click on Add Subscriptions.



> Enter the details as required and Click on Subscribe to get mail notifications.

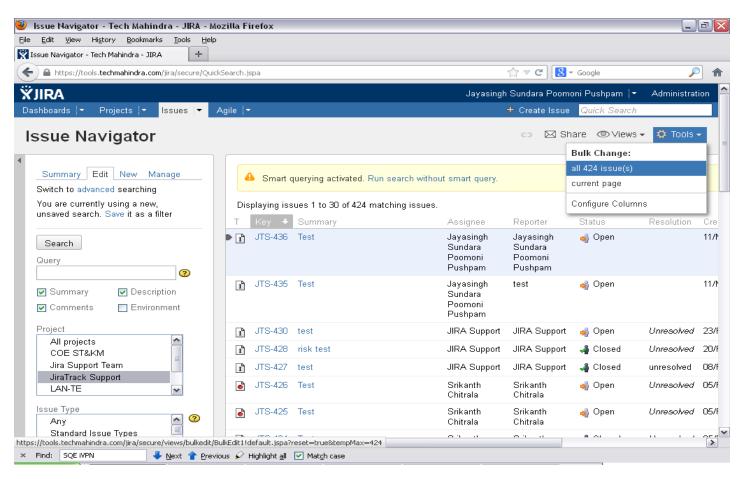




3.7 CHANGE OF ISSUE TYPE FROM RISK TO ISSUES BY USING BULK MOVE

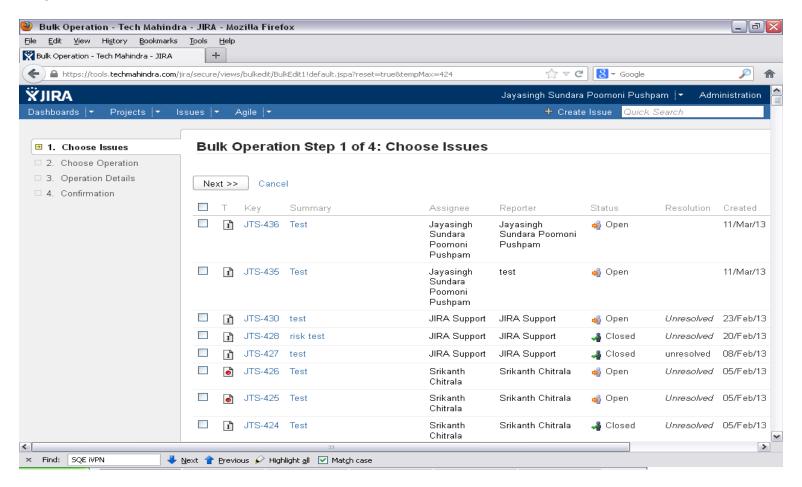
The bulk change operation can be done from the following steps:

➤ In the issue navigator page from the **'Tools'** menu at the right of the screen (above the search results), select **'all issues'**



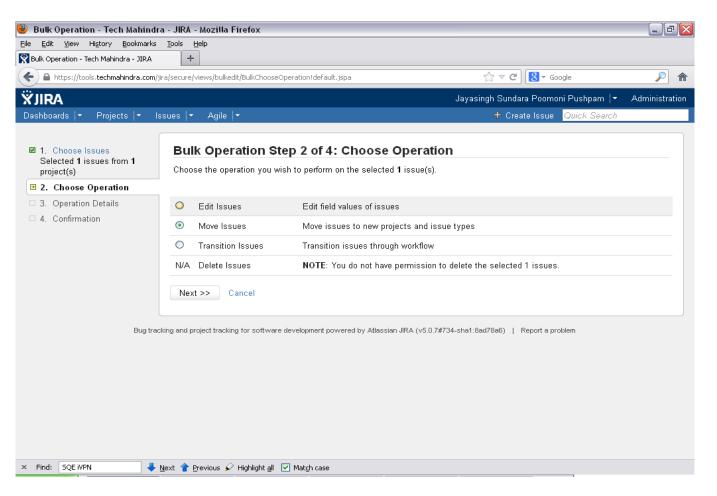


> The following page will be displayed. Select the issues which need to be changed from the risk to issues by clicking on the check boxes and then Click on **'Next'**



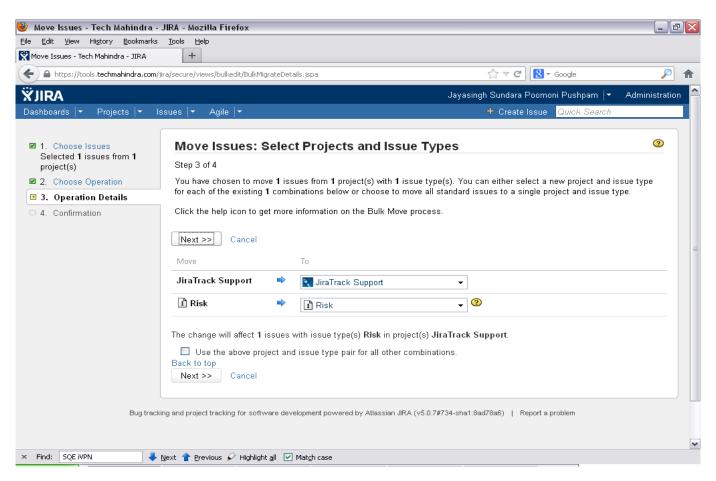


> Choose 'Move Issues' radio button and Click on ' Next'





From the Issue Type drop down, select the issue type to which the issue type is to be converted to and click on 'Next' from the bottom of the page. Note: do not check the *Use the above project and issue type pair for all other combinations* as this will allow the tool to compare the fields with other issue types as well.



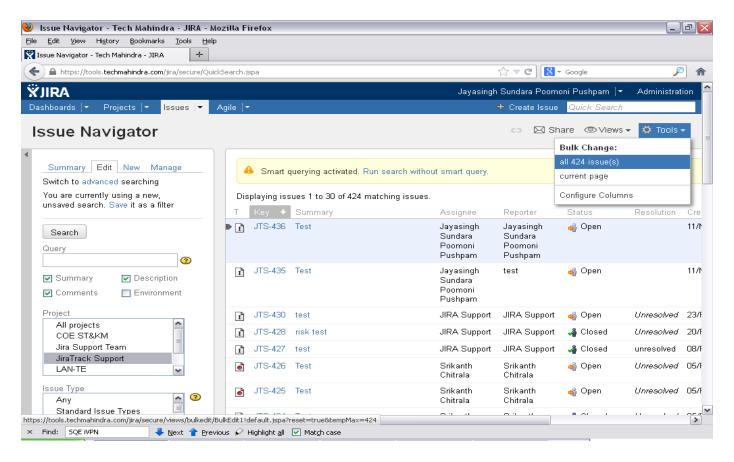


> Click on 'Confirm' button to confirm the changes made and the Issue type from Risk will be changed to 'Issues'.

3.8 Bulk change operation for moving bulk issues

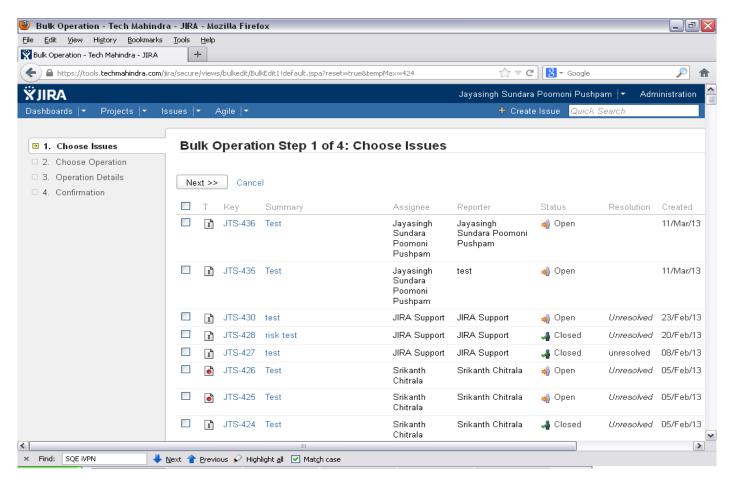
The bulk move operation can be done from the following steps:

➤ In the issue navigator page from the **'Tools'** menu at the right of the screen (above the search results), select **'all issues'**



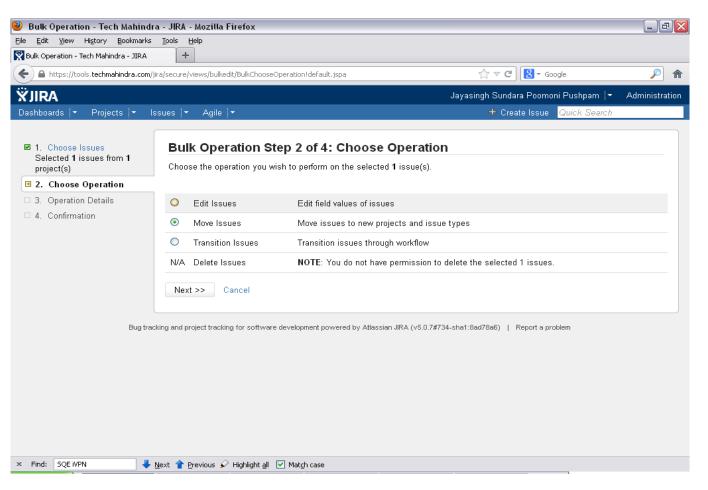


➤ The following page will be displayed. Select the issues which needs to be changed from the risk to issues by clicking on the check boxes and the Click on 'Next'



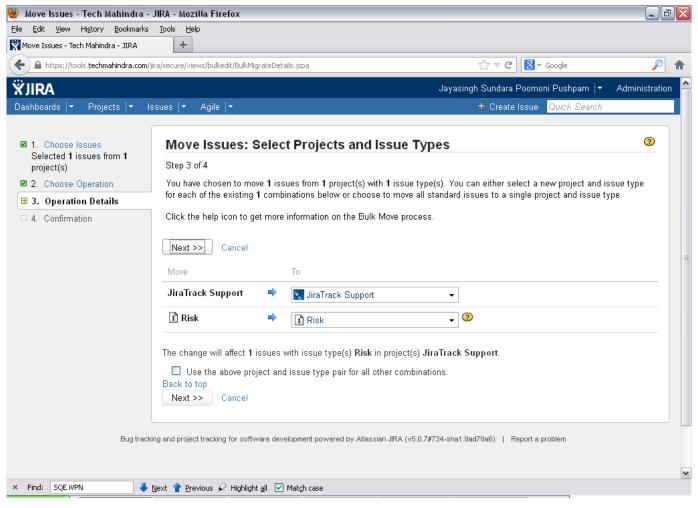


> Choose 'Move Issues' by the radio button and Click on 'Next'



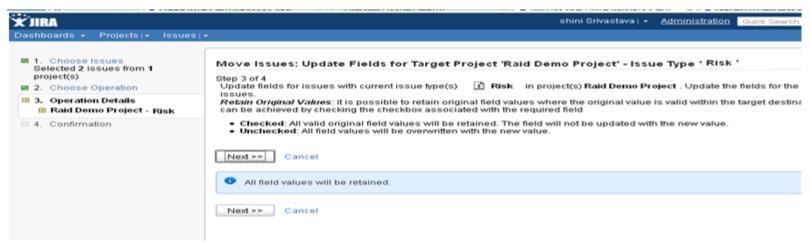


From the project drop down select the select the project to which the issue has to be moved and click on 'Next' from the bottom of the page. Note: do not check the *Use the above project and issue type pair for all other combinations* as this will allow the tool to compare the fields with other issue types as well.

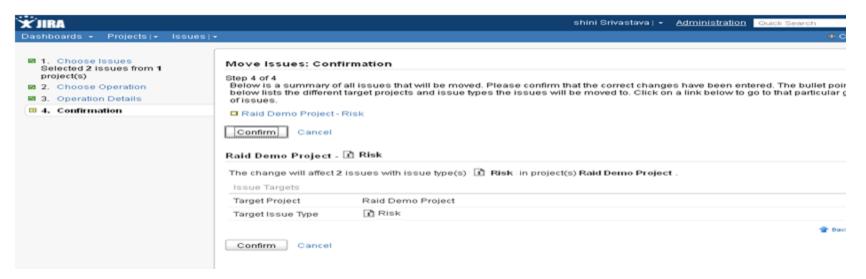




> Click on 'Next' since all the fields will be retained.



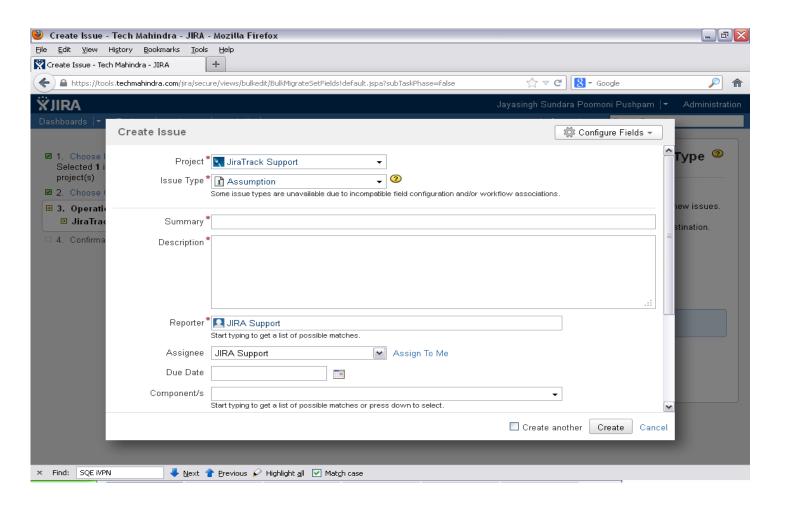
> Click on 'Confirm' to confirm the move operation.





4 ASSUMPTION TEMPLATE

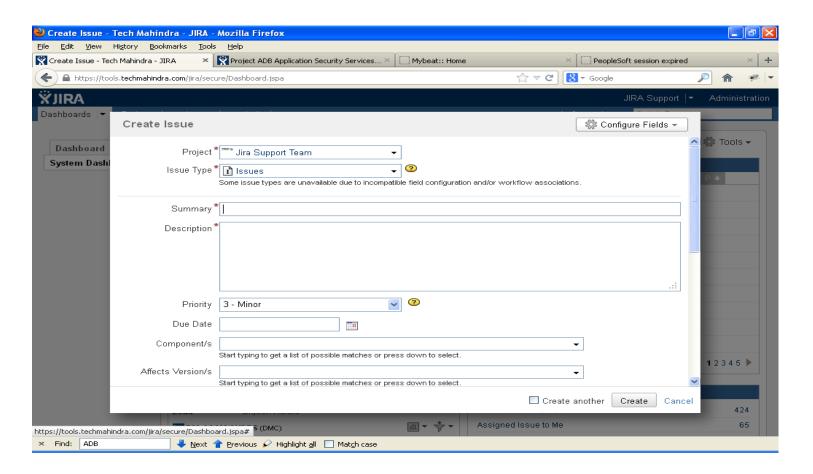
Assumption Template for RAID tracking





5 ISSUES TEMPLATE

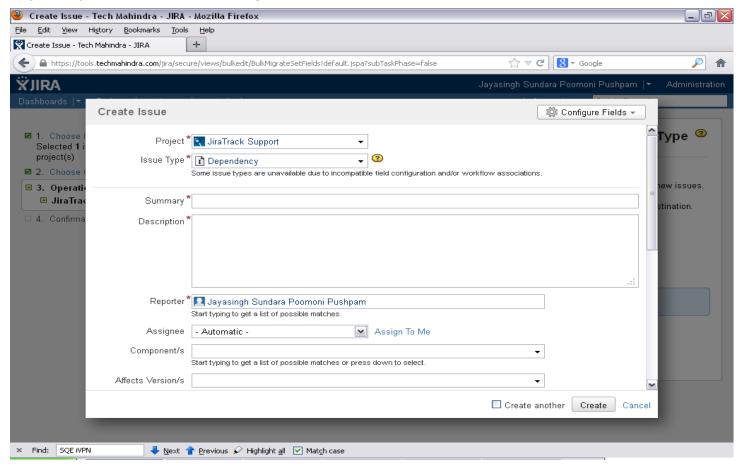
Issues Template for RAID tracking



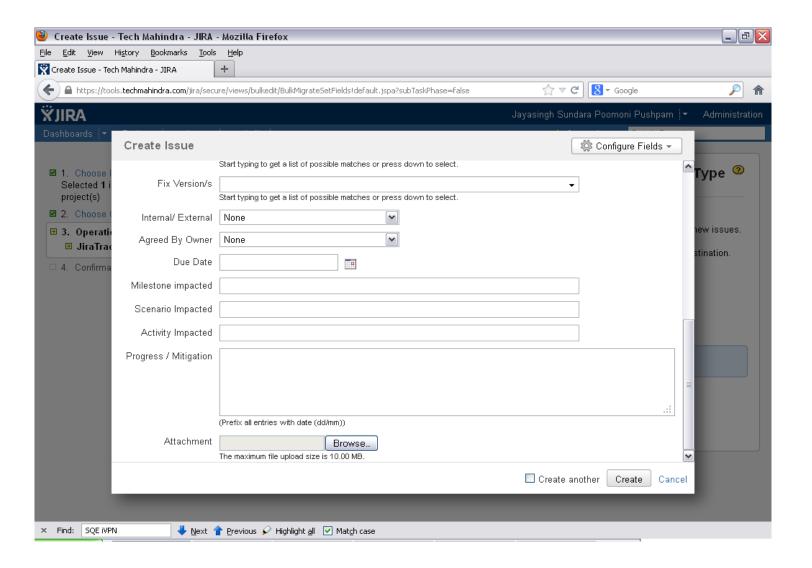


6 DEPENDENCY TEMPLATE

Dependency Template for RAID tracking





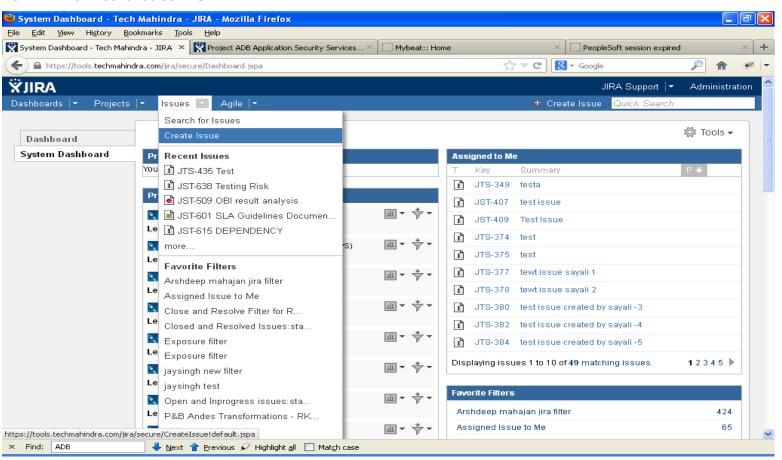




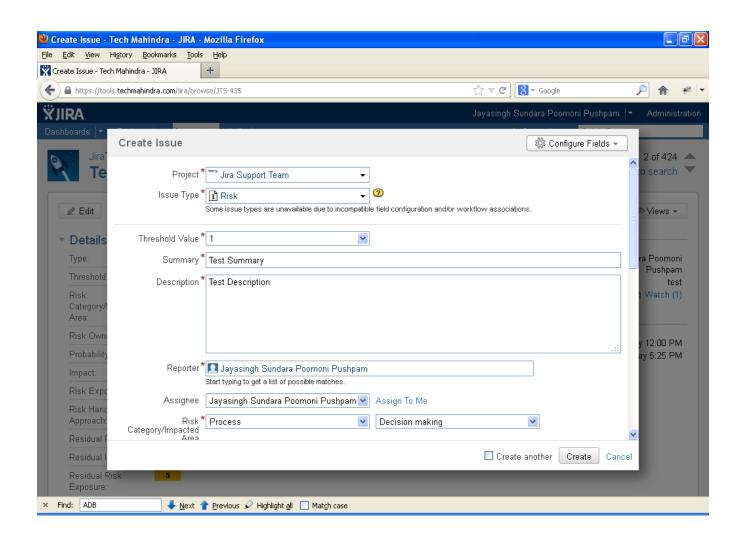
7 QUICK WALK THROUGH

10.1 RISK

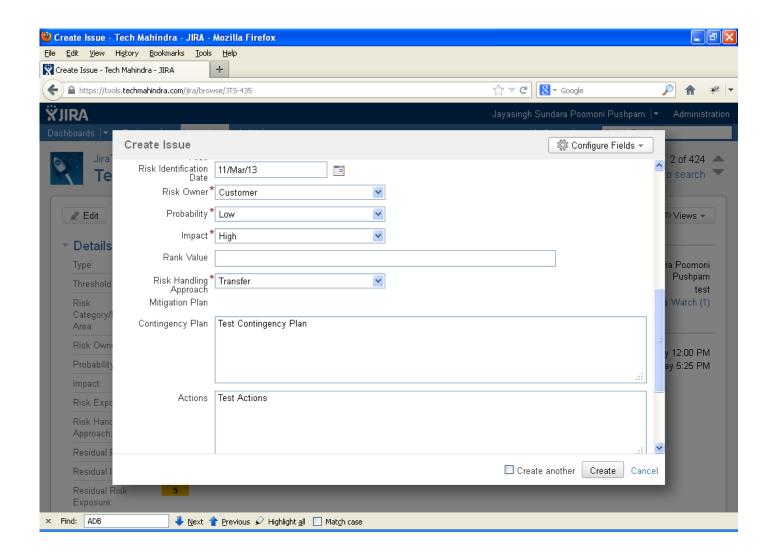
10.1.1 How to create Risk?



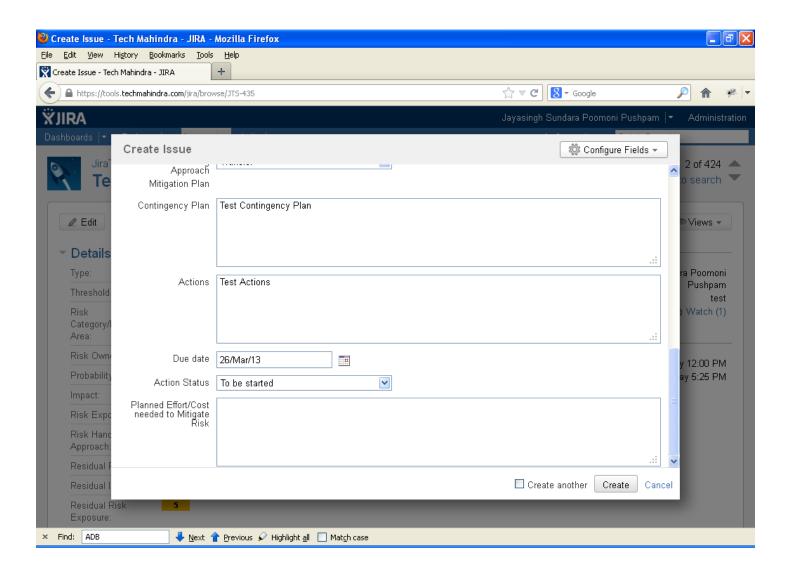








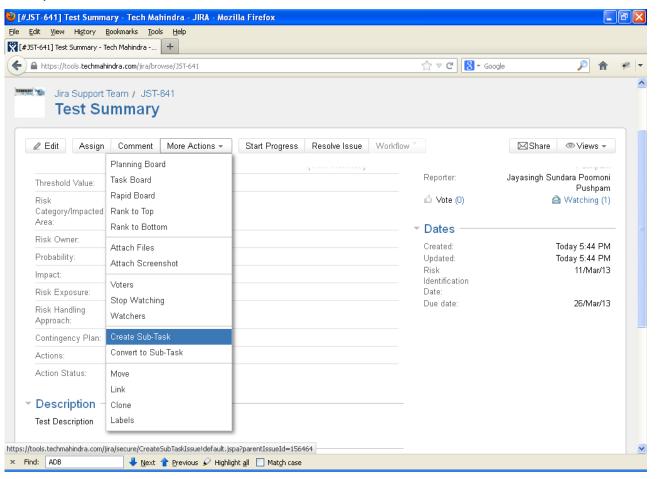




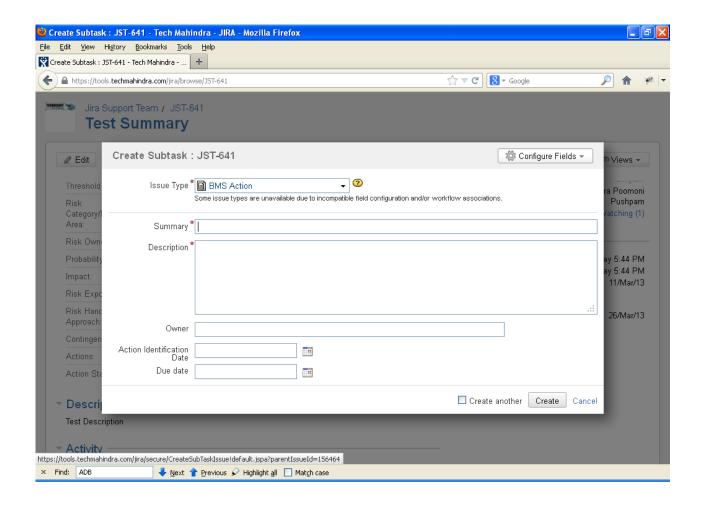


10.1.2 How to create the subtask?

After the Risk has been created, sub-task can be created by clicking on More Actions tab and selecting Create Sub-Task option.



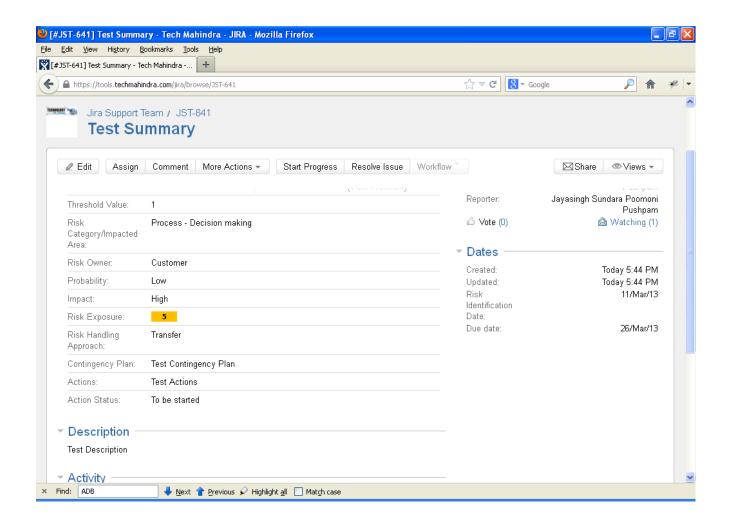






10.1.3 How to Modify/Update the Risk?

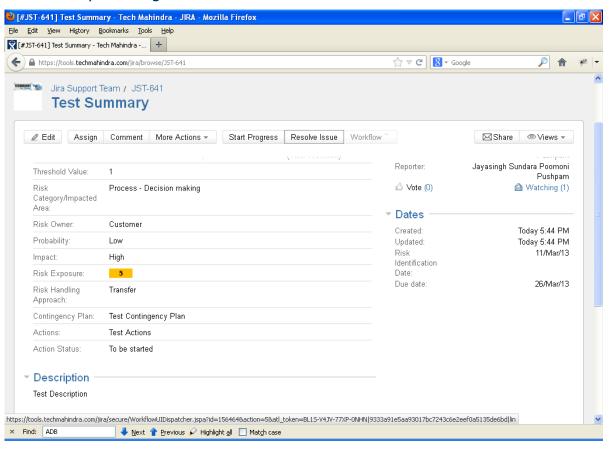
After the Risk has been created, it can be edited by clicking on Edit tab.



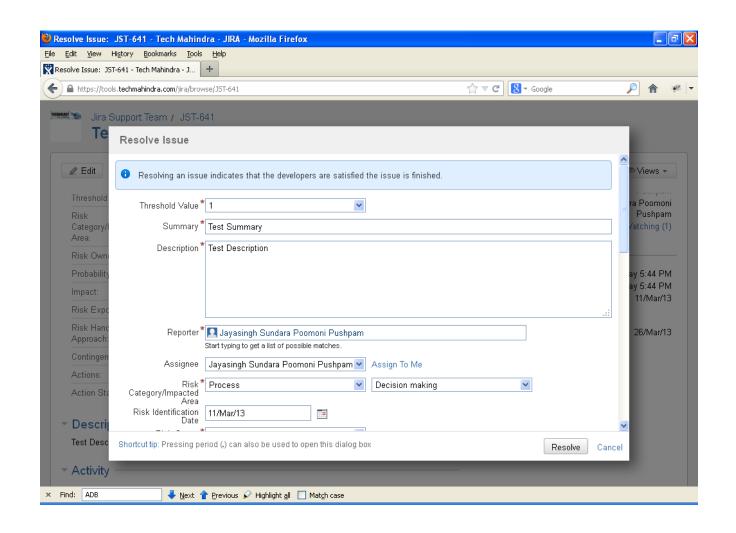


10.1.4 How to Resolve the Issue?

The Issue can be resolve by clicking on Resolve Issue tab.



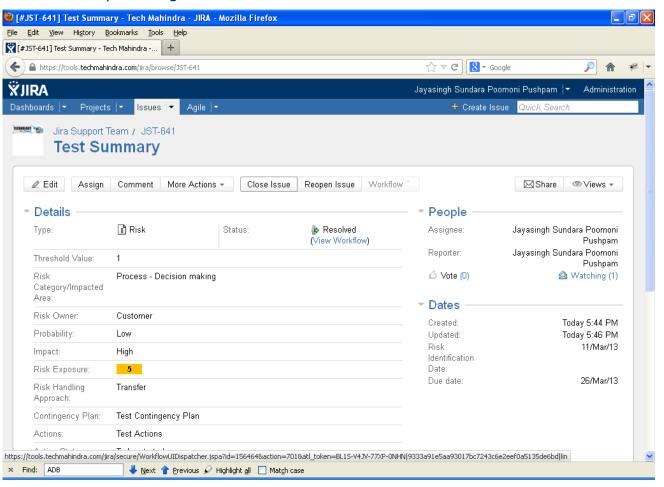




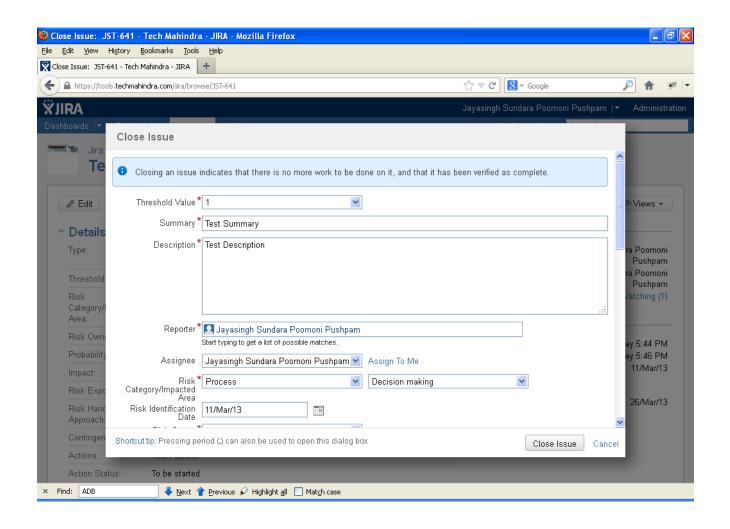


10.1.5 How to Close the issue?

The Issue can be closed by clicking on Close Issue tab.



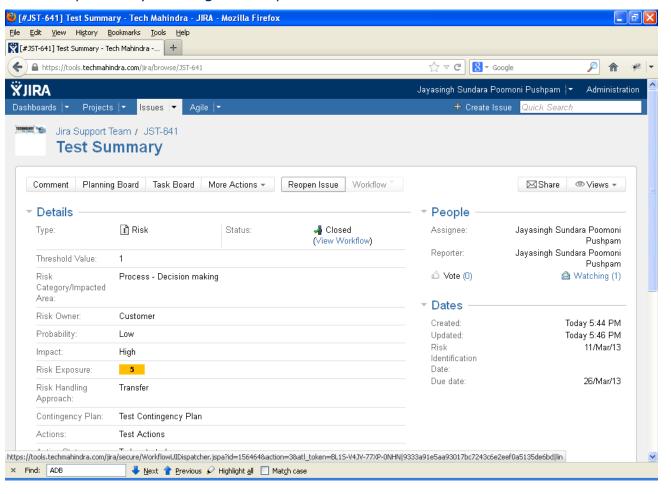




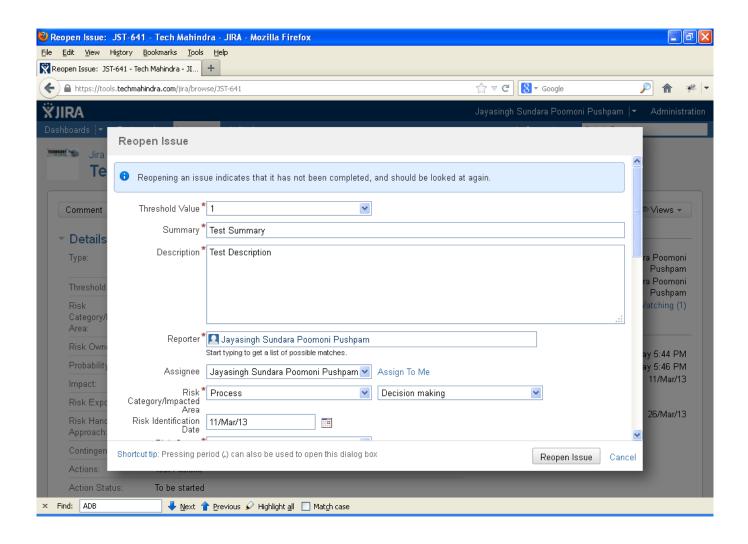


10.1.6 How to Reopen the issue?

The Issue can be re-opened by clicking on Reopen Issue tab.



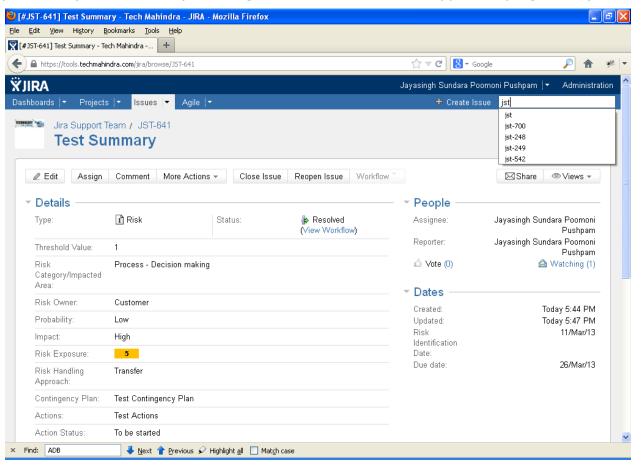




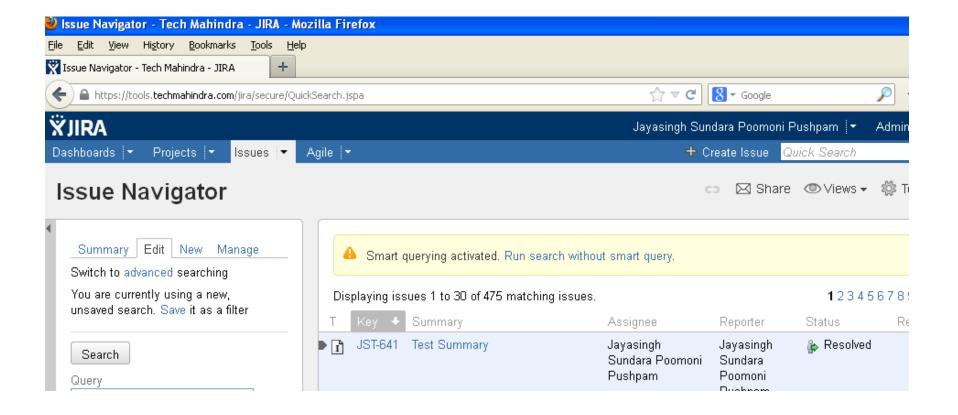


10.1.7 How to Quickly Search your issue from the Issue Navigator?

You can quickly search your issues by clicking on Quick Search and type the project key.



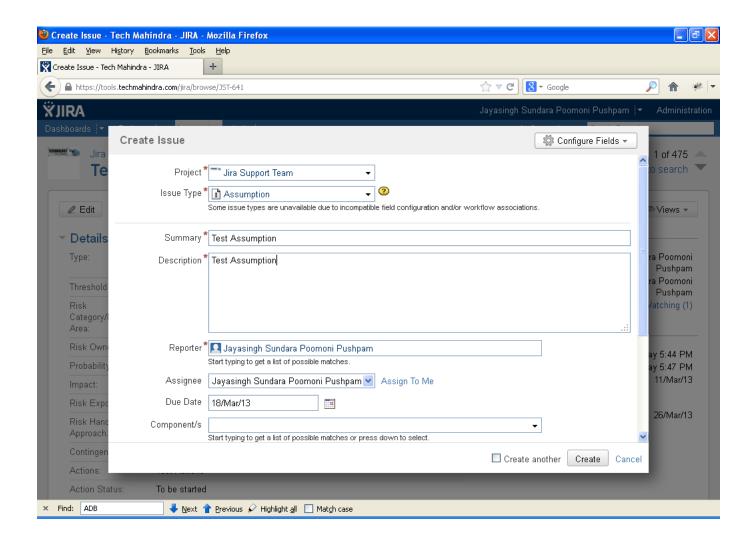






10.2 ASSUMPTION

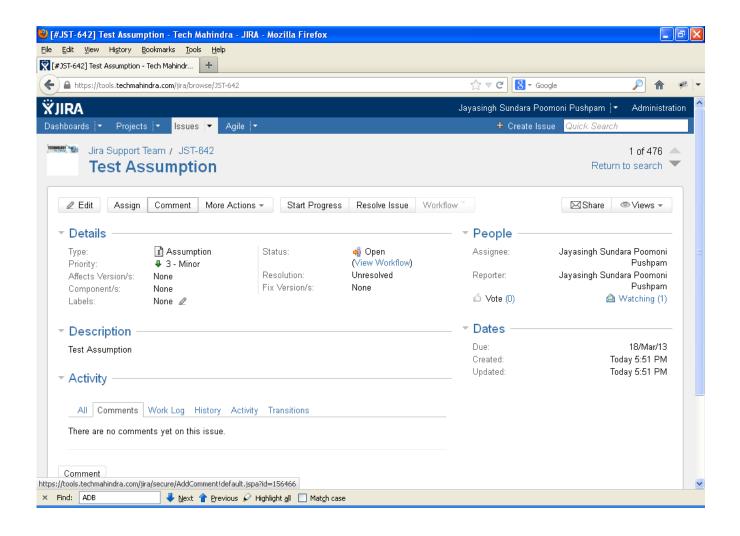
10.2.1 How to create Assumption?





10.2.2 How to Comment in an Issue?

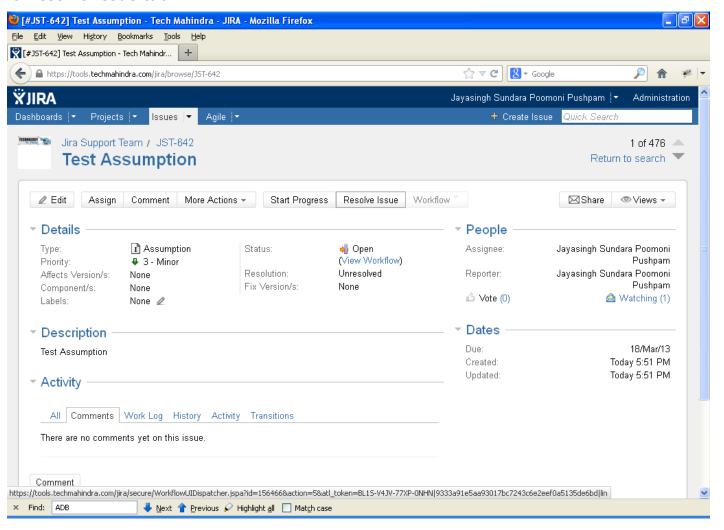
To comment on an issue, click on the Comment tab and write the comment. Then click on ADD.



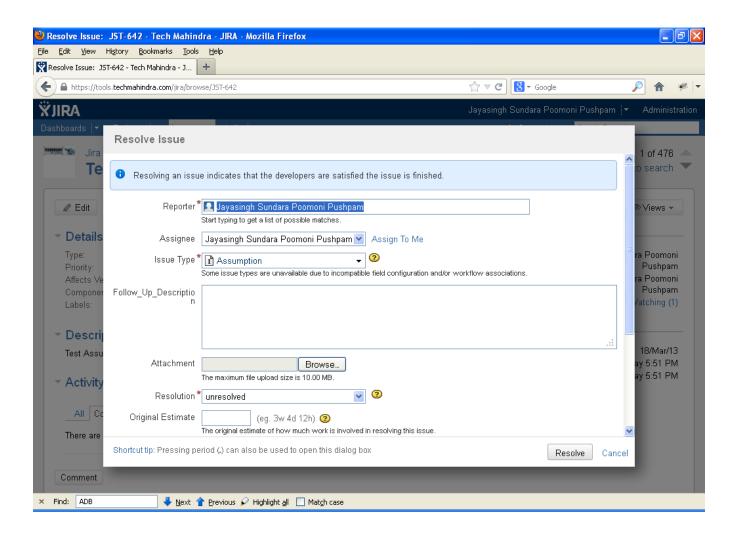


10.2.3 How to Resolve and Close the Assumption?

Click on the Resolve Issue tab.



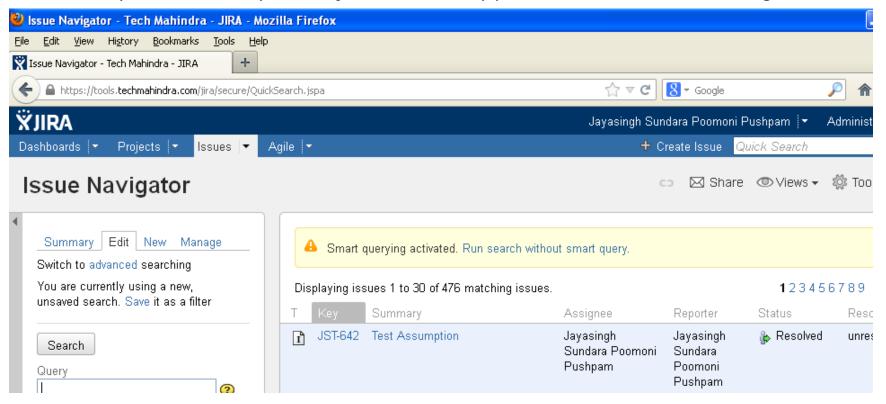






Now click on the Close Issue tab for closing the issue.

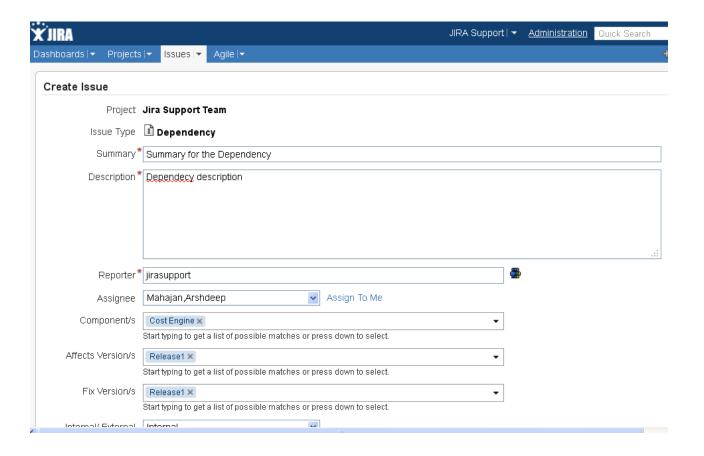
You can view your issue which you have just created at any point of time from the Issue Navigator.



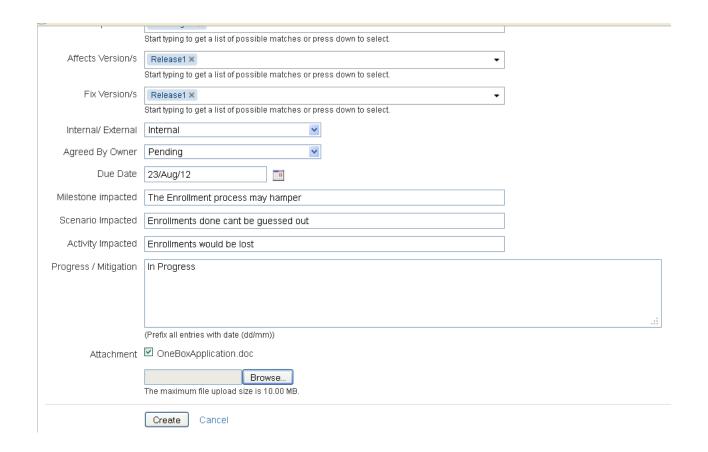


10.3 DEPENDENCY

10.3.1 How to create Dependency?

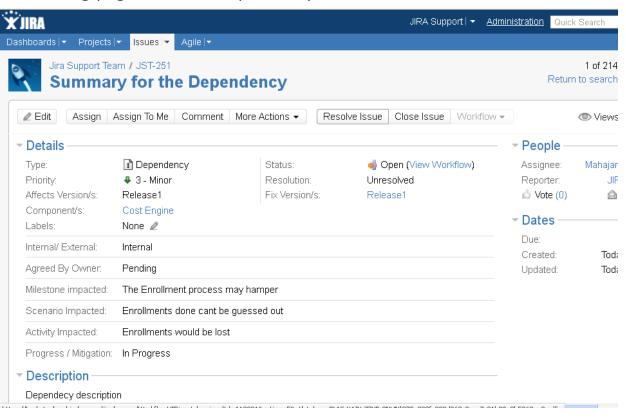








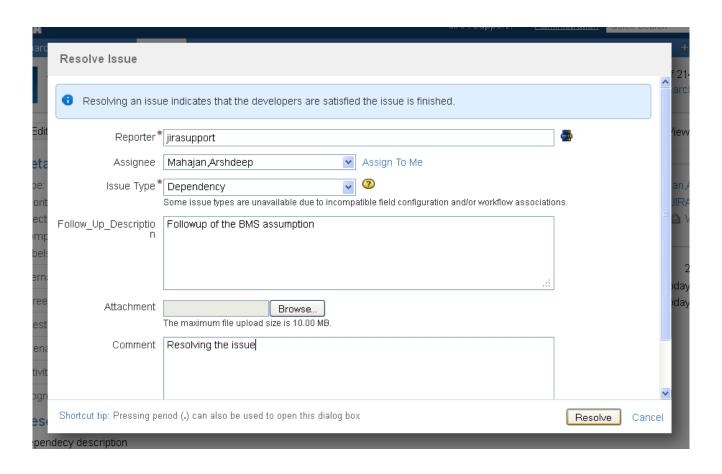
You can view the following page after the Dependency is created.





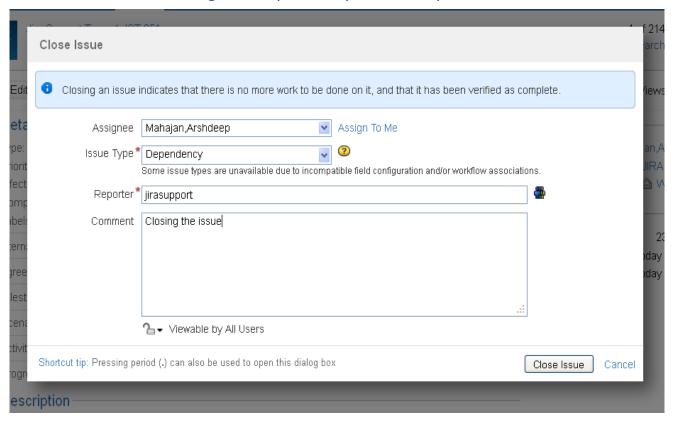
10.3.2 How to Resolve and Close the Issue?

Click on the Resolve Issue tab for resolving the issue.





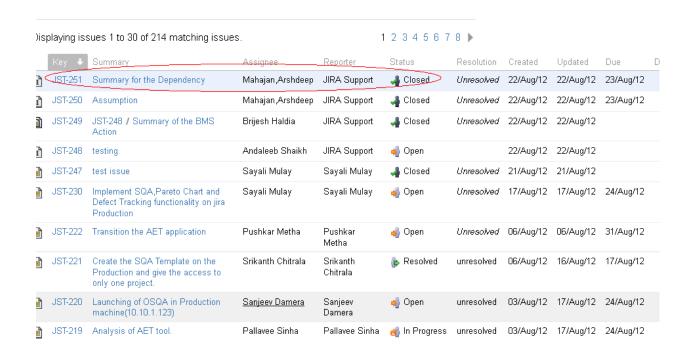
Click on the Close Issue tab for closing the Dependency once completed.





10.3.3 How to view your issues?

You can view your issue in the Issue Navigator as shown below:



END OF DOCUMENT

