

## 1 Introduction

Track-IT has been a primary incident management system within the company for many years. As a multi-purpose tracking system, it has been used for everything IT-related from simple password changes through the creation and implementation of sophisticated data-driven applications. This tool is effective for what it was intended to be: a place to manage emails from users, tickets, change requests, purchase requests and IT assets all in one place. It is a simple ticket system. It was not designed for project management.

Jira is a relative newcomer in the project ecosystem. Jira a purpose-built project tracking system that does an excellent job of managing information related to complex projects. It is one of many tools favored by seasoned project managers. Jira has been in use now by our staff for about five years and has proven to be an effective tool for managing projects.

Considerable debate has formed around “which tool is the ONE we should all use.” But I propose that neither of these is a one-size-fits-all tool. Rather, each has its place within the organization. I write this analysis with no intention of phasing out Track-IT or using Track-IT for project management, but rather, to illustrate the deficiencies in how we are currently using those tools vs. how they should be used for optimal communication.

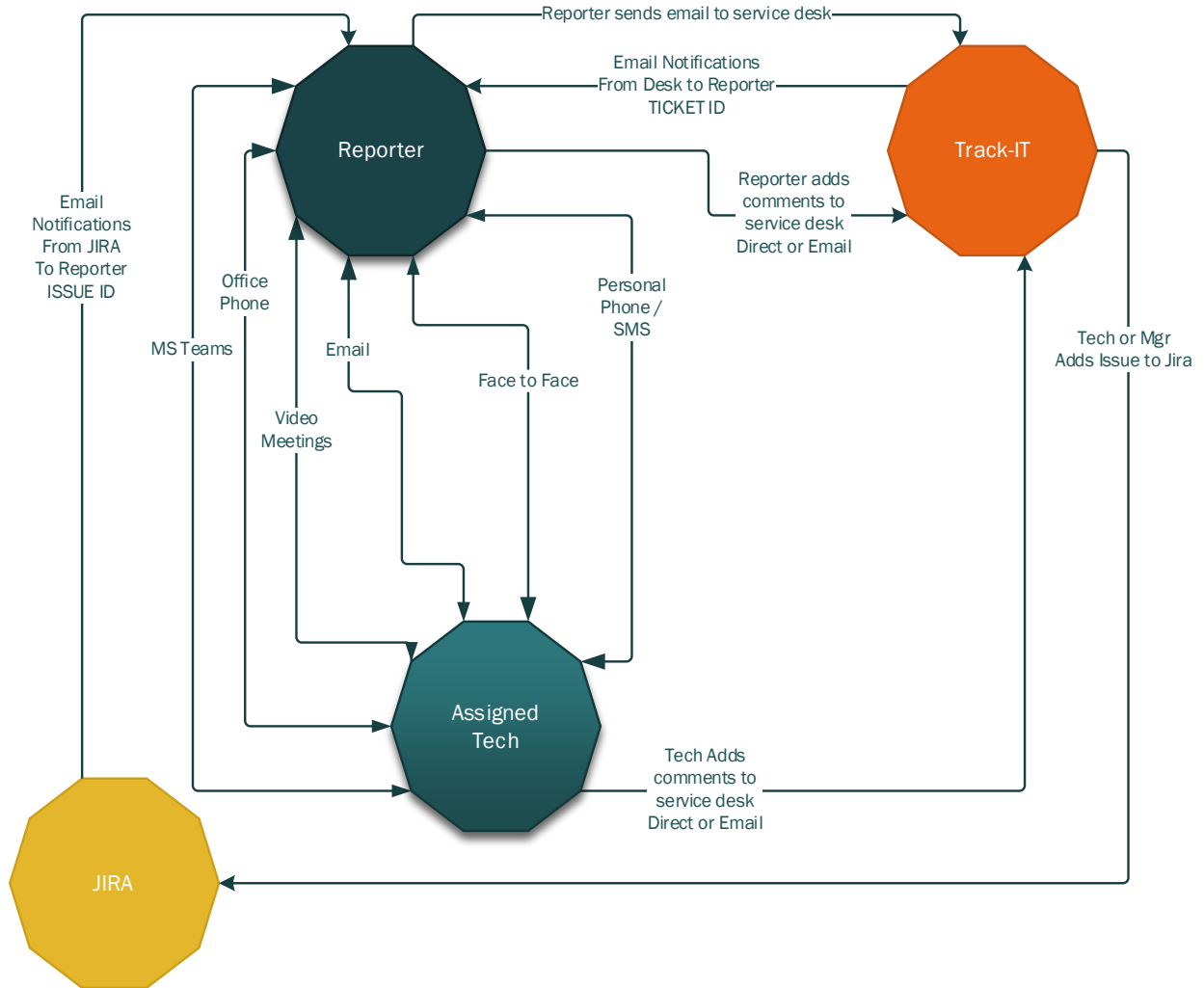
Concerns have also been raised about auditing. One purpose of this document, should the process be adopted, is to contribute this plan as a necessary resource of any audit.

For both Track-IT and Jira, licensing is an issue. There are not enough licenses in either system for either one of them to be used as the primary communication channel. This document will highlight how external communications should be optimized to ensure that knowledge is not lost outside of either system.

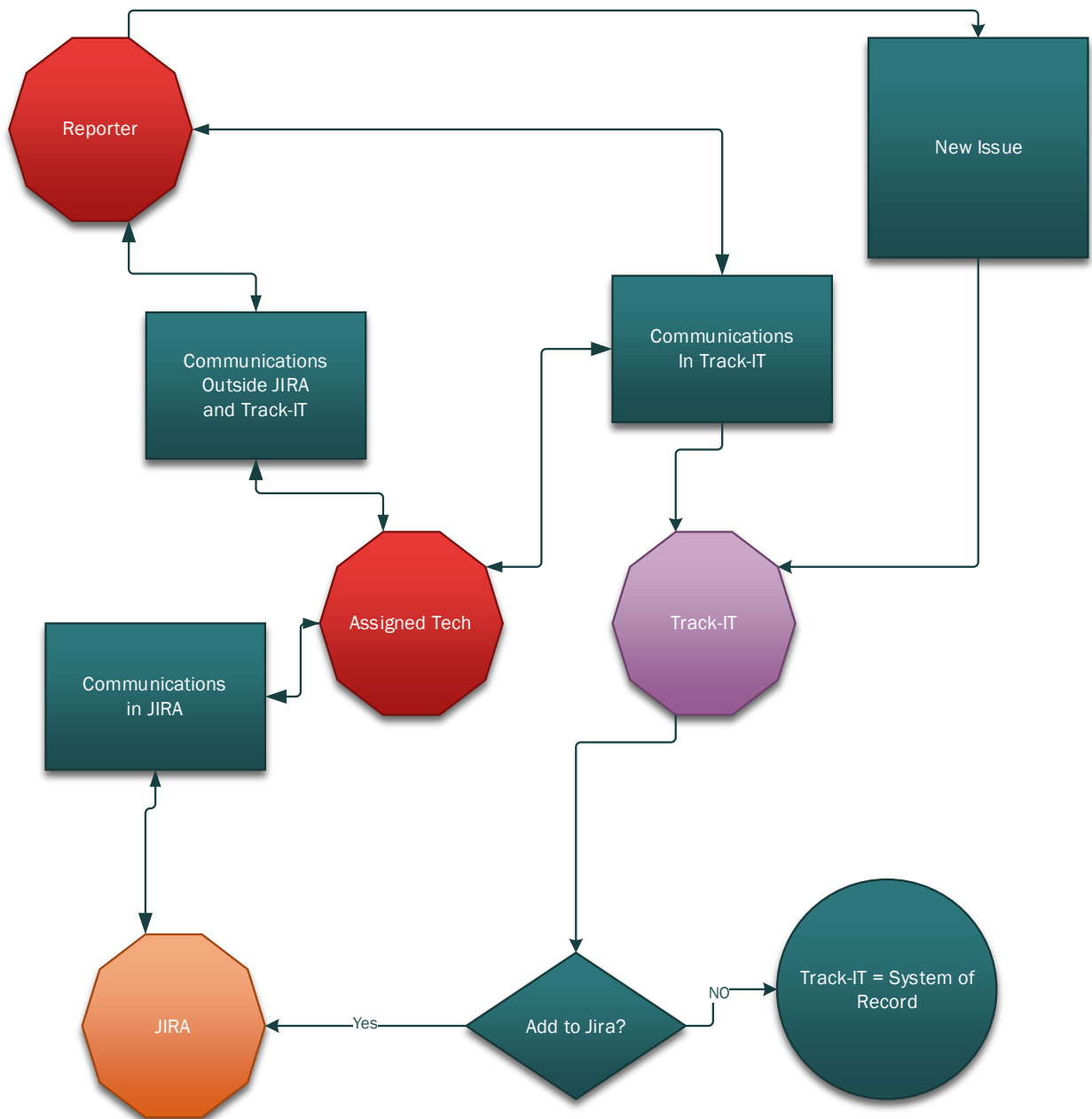
You will also notice within the charts the words “system of record.” It means for any ticket or issue that the system of record is the primary place to look for all information related to that ticket or issue.

On the next pages, I have charted how Track-IT and Jira are currently used alongside external communication channels and then I visually describe the current workflow. Following that, I have documented the deficiencies in the current process and wrap up my analysis with recommendations to fix these problems.

## 2 Communication Channels AS-IS



### 3 Workflow AS-IS



## 3.1 Deficiencies in Communications Channels and Workflows AS-IS

### 3.1.1 No Agreement on Primary Tracking Systems

Some people use JIRA exclusively. Some use Track-IT exclusively. Some people refuse to use one or the other of those systems. Since there is no meeting of the minds, each team is operating in knowledge silos. Silos are never good for organizational knowledge. They are highly susceptible to employee priorities, absences, and attrition.

### 3.1.2 No Continuity Between Systems

There is currently no way to automatically link the two systems together, nor will there ever likely be. And I am not recommending that they ever should be. More important than automation is that there is no continuity between the two systems.

For example, if an issue is chosen to be escalated to a JIRA ticket, there is no policy in place requiring the reporter to link from the originating service desk ticket to a JIRA issue. Essentially there is no link between an originating reporter email through the solution which may be tracked either in Track-IT or Jira or both or neither.

### 3.1.3 Multiple Unsynchronized Channels

Typically, the journey of an issue begins with an email to [servicedesk@thecompany.com](mailto:servicedesk@thecompany.com). An automated email confirms that a new ticket exists. Eventually a tech is assigned to work on the ticket whereupon another automated email is sent to the tech.

The efficient thing to do for tickets that are going to stay within the Track-IT system would be to carry on all conversations within Track-IT. However, that is not what typically happens today. Today there may be any number of conversations between the reporter and tech over the phone, video conferencing, email, MS Teams, and face to face meetings. And unfortunately, typically the techs are not keeping a record of all those conversations. Since there is no uniformity to the communications, and no policies about storing them within Track-IT or Jira, the knowledge exists mostly within the minds, computers, emails, and other channels that each tech controls. There is no organization-wide knowledgebase for issues except that which has voluntarily been contributed to the Track-IT and Jira systems.

### 3.1.4 Inconsistent Tracking and Feedback

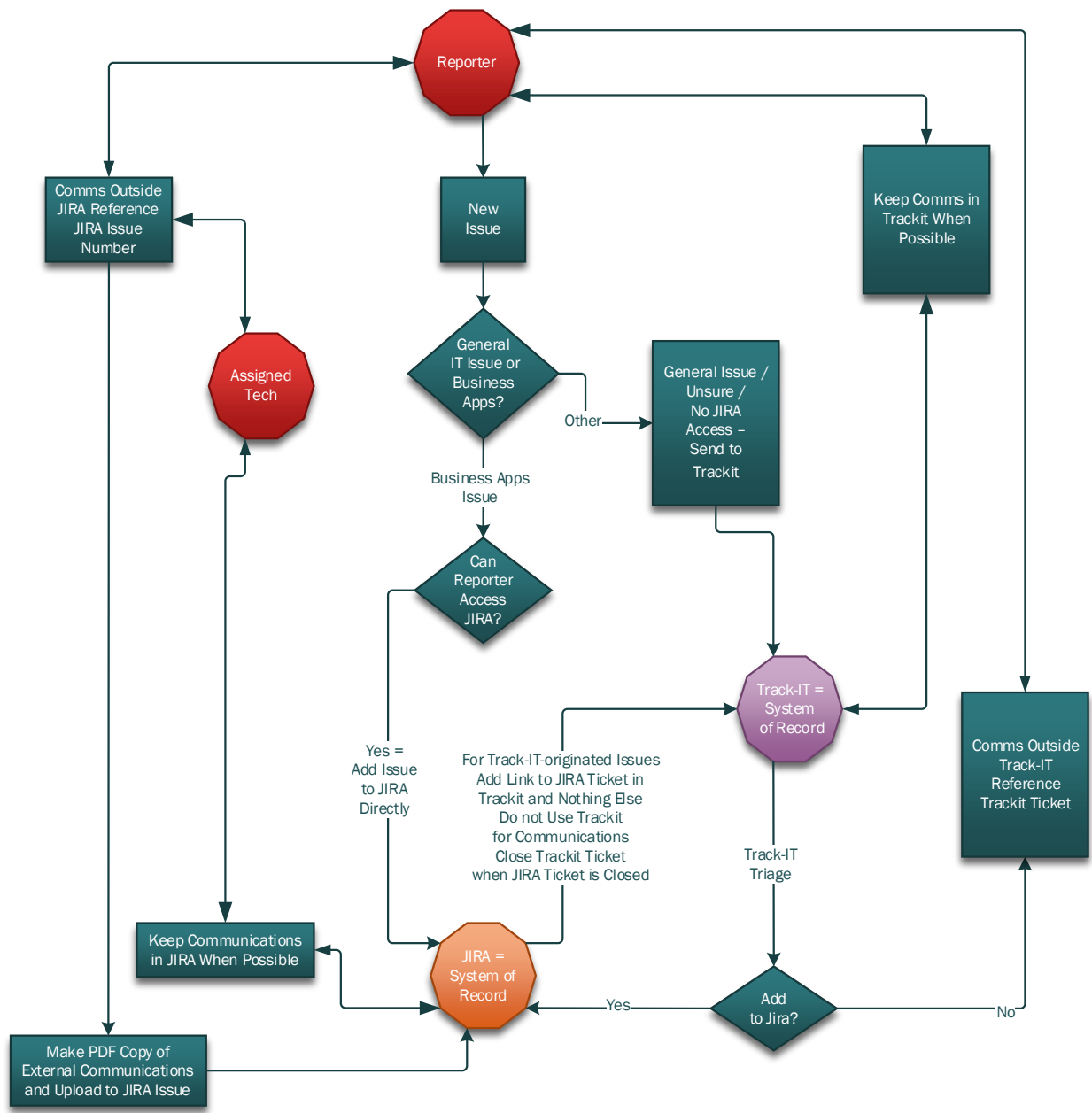
# Project Triage and Communications and Communications Plan

By Mark Warrick

March 29, 2022

Because each tech is essentially operating in a silo, each tech becomes a sort of “project manager” for their assigned issues. What ends up happening, is that the way we report status back to reporters differs from tech to tech. Additionally, since the efforts are not being centrally tracked, there is no way to consistently identify the department-wide workload, efficiency and competing priorities across the entire staff, nor the entire portfolio of projects.

## 4 Recommended Workflow To-Be



## 4.1 Agreement on Systems of Record Must Be Followed

For this communication plan to work, the participants must follow the plan. It will no longer be optional which system the participants will use, but rather, a requirement. This plan must be enforced by management.

## 4.2 Tracking System Continuity

When an issue begins in Track-IT and moves to Jira, the original Ticket number needs to be part of the Jira issue description. When a Jira issue is created from a Track-IT ticket, a note needs to be placed within the originating Track-IT ticket referencing the Jira issue. And a note back to the reporter needs to be added in Track-IT so that the reporter will know that (a) all further communications on the issue will happen within Jira and (b) Jira has become the system of record.

Whenever emails are sent outside of either system, the ticket or Jira number needs to be part of the subject line of those emails. Only the system of record's related ticket or issue number needs to be used. The same will apply to all meeting requests, reports, and all other communications. These ID numbers are the only way to accurately and consistently associate communications back to systems of record.

## 4.3 Channel Synchronization

A best practice would be to copy all communications received on external channels to the system of record. This does not have to be every single message received and sent. But it should include important decisions and the conversations that led up to them. For the record:

- All video conferences should be recorded and a link to the recording added to the system of record. Videos are to be stored in the Microsoft Stream service which doesn't have file expirations. Videos are not to be referenced in personal OneDrive folders
- If a meeting was related to many issues, a link within each of them needs to be added with a reference to the time within the meeting recording in which that issue was discussed.
- All meetings should have minutes, and those should be added to the system of record.
- All email chains that result in a decision need to be printed to a PDF and attached to the system of record. Do not attach .MSG files as those are not viewable on all platforms.
- MS Teams chat should never be used for decisions.
- SMS messaging should never be used for decisions.
- Verbal conversations should never be the "source" of decisions.
- Any other communication should be documented within the system of record.

## 4.4 Issue Triage

Issues shall never be tracked BOTH in Track-IT AND in Jira simultaneously. Whether new issues are in Track-IT or entered directly in Jira, **there needs to be a person acting in a triage role**, directing, and prioritizing issues as either IT or Business Apps. We would need to determine a hierarchy of assignments for both systems.

### **Example #1: Reporter states that they cannot login to their workstation.**

This is purely an IT issue and should stay within Track-IT. Communications should all originate within Track-It.

### **Example #2: Reporter states that they cannot login to an application**

This could be either an IT issue or a Business Apps issue. If upon further research it ends up being strictly an IT issue, it would stay within Track-IT. However, if it turns out that it is a Business Apps issue, then the person managing the original ticket should create an issue within the Triage project of Jira and assign it to the Triage person in Jira.

### **Example #3: Reporter states that the SSRS Report is “taking too long”.**

This could be an IT issue, but it is more likely a Business Apps issue. If the reporter can add an issue in Jira, they should do so within the Triage project. But if they are uncertain or do not have Jira access, they could just send an email to the service desk and then a triage tech will manage it from there. In either case, the Triage tech would inform the reporter whether that issue will be tracked within Track-IT or Jira.

### **Example #4: I need a new Power BI report to do...**

This would clearly be an issue to add to Jira. Assuming the reporter had access to Jira, they would add it to the triage project. Otherwise, they would send it to the service desk and then it would be routed to Jira from there.

## 4.5 Each Department Must Have a Contact aka “Project Manager” and an Account in JIRA

Multi-channel synchronization has been and will continue to be an issue well into the future. The more we can get people to use Jira for all business application communications vs. other channels, the better the knowledgebase will become. A solid knowledge base ultimately lead to better communication, increased teamwork across departments, better planning, better reporting, and more confidence among stakeholders.

We cannot expect everyone in the company to have access to Jira, but it is a reasonable expectation that a designated contact aka “project manager” from each department should collect all requirements from their departments, report them within Jira and then report back status and results to their department’s staff. As this company continues to grow, this will be progressively more important.

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Since a project manager of each department will be designated and since we will be using “systems of record” which will contain all pertinent information, the project managers will not need to (and should not) reach out to assignees for status reports.

Additionally, by using a project manager in each department, all UAT efforts, all signoffs, etc. will be funneled through that one person. This will increase consistency in those efforts.

## 4.5.1 Project Manager Roster

To be determined prior to the commencement of this communication plan.

Department	Project Manager	Reports To

## 4.6 Jira Project / Person Assignments

We would set up a triage project in Jira. A triage tech needs to have access to all projects within Jira to move issues around and owners of other projects need to have access to the triage project in order to communicate with the triage tech.

The triage tech should have a basic understanding of the purpose of each of the projects in Jira to know which new issues go into which projects. Issues will initially be assigned to project owners, and then the project owners would assign issues to individuals. If the triage tech does not know where to put an issue, they will reach out to project owners for clarification via the issue comments.

## 5 Summary

This document is either a first attempt at making communications more efficient, a foundation upon which greater productivity can be built or at the least it is a record of known issues. The author hopes that the information presented will inspire the leaders of the company to at least open a dialog into the problems and work toward a solution.