BT Deliverables Process Guide

Background

BT tracks deliverables[1]in JIRA and stores the controlled documents in BT SharePoint.

- Deliverable Documents in SharePoint.
- Deliverables in JIRA.

There are two main sections to this document

- Pre-Release, Creating or Modifying a Deliverable Process
- Deliverable Sign Off Process

For more information about this process or any technical difficulties please contact PMO Workflow Deliverables PMOWorkflowDeliverables@ird.govt.nz

1 1. Pre-Release, Creating or Modifying a Deliverable Process

A. Pre-Release Preparation Process

Before the start of each BT Release, the required deliverables are identified.   Workstreams are responsible for identifying these, developing the deliverables and on completion, for arranging formal sign off by the Responsible and Accountable persons. After approval, the BT PMO will facilitate a deliverable QA. Deliverables are recorded in a Release Specific **Deliverables Register** and on completion, stored in the Deliverables Library on **BT SharePoint**.

Once the **Deliverables Register** is baselined, the deliverables are:

- provided a unique Deliverable ID (e.g., BTDEL-1234),
- a JIRA record is created for tracking purposes, and
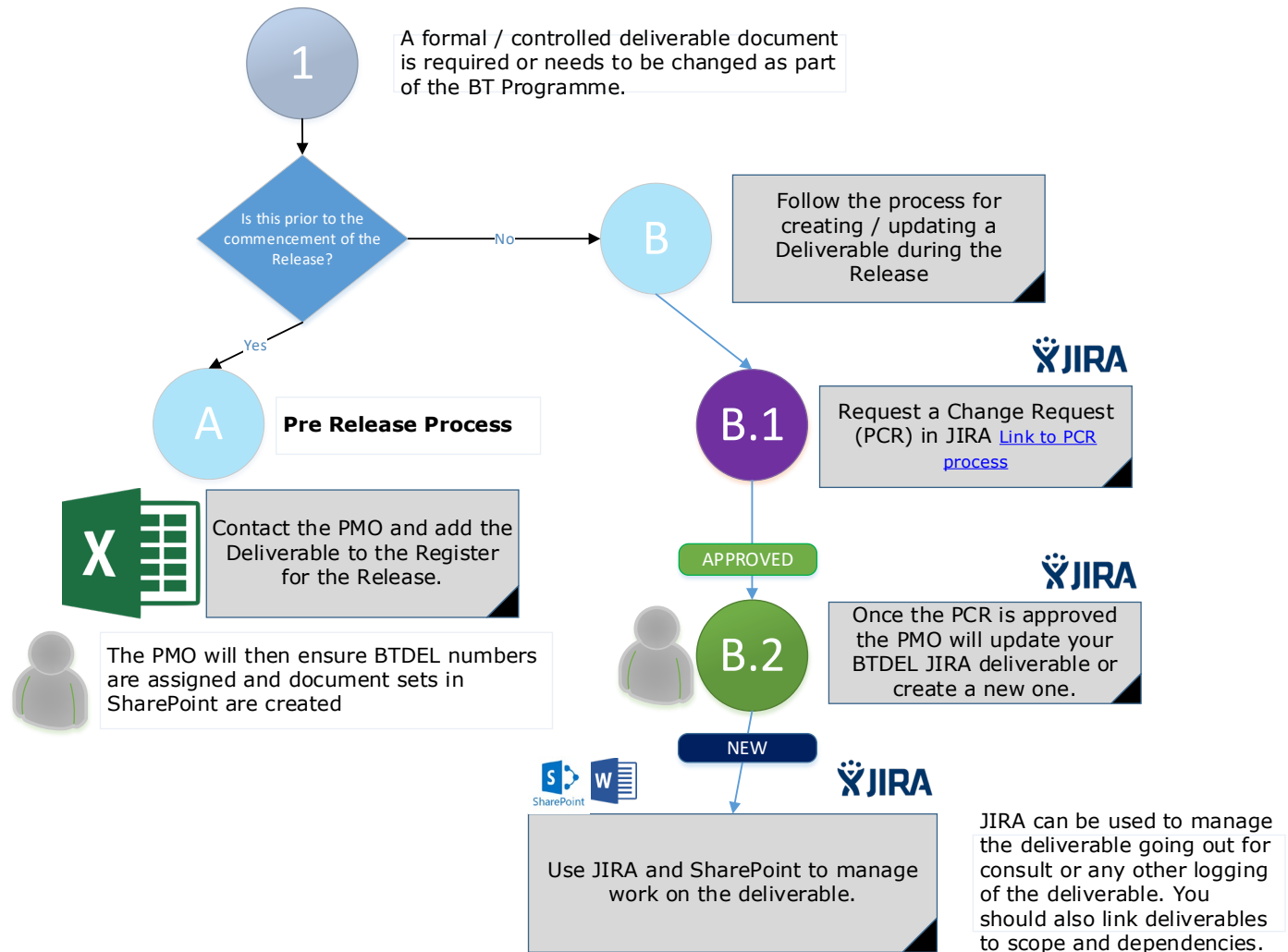- managed under change control

Being under change control means that **no informal changes** can be made to the:

- Deliverable Name, Description, RACI, or Completion Dates,
- *Including descoping a deliverable.*

Formal approval is required to change a deliverable. The change management process must be followed, and a Programme Change Request (PCR) is required.

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[1] A deliverable is a programme artefact not a project artefact. For more information, please contact PMOWorkflowDeliverables@ird.govt.nz

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1 — A formal / controlled deliverable document is required or needs to be changed as part of the BT Programme.

Is this prior to the commencement of the Release?

No → **B** — Follow the process for creating / updating a Deliverable during the Release

Yes → **A** — **Pre Release Process**

Contact the PMO and add the Deliverable to the Register for the Release.

The PMO will then ensure BTDEL numbers are assigned and document sets in SharePoint are created

B.1 — Request a Change Request (PCR) in JIRA Link to PCR process

APPROVED

B.2 — Once the PCR is approved the PMO will update your BTDEL JIRA deliverable or create a new one.

NEW

Use JIRA and SharePoint to manage work on the deliverable.

JIRA can be used to manage the deliverable going out for consult or any other logging of the deliverable. You should also link deliverables to scope and dependencies.

B. Process during a Release

B.1 Request a PCR

To request a NEW deliverable or AMEND an existing deliverable you must use the Programme Change Management process. Link to PCR process

B.2 BT PMO Update JIRA and BT SharePoint

Once the PCR is approved, BT PMO will:

a) Update the existing JIRA BTDEL record, or
b) Create a NEW deliverable JIRA item (this will provide the unique BTDEL ID.)
c) Create a BT SharePoint Deliverable Doc Set for the deliverable documents to be stored.
d) Update the Document link in JIRA to point to the SharePoint doc set.
e) Update the master **Deliverable Register**
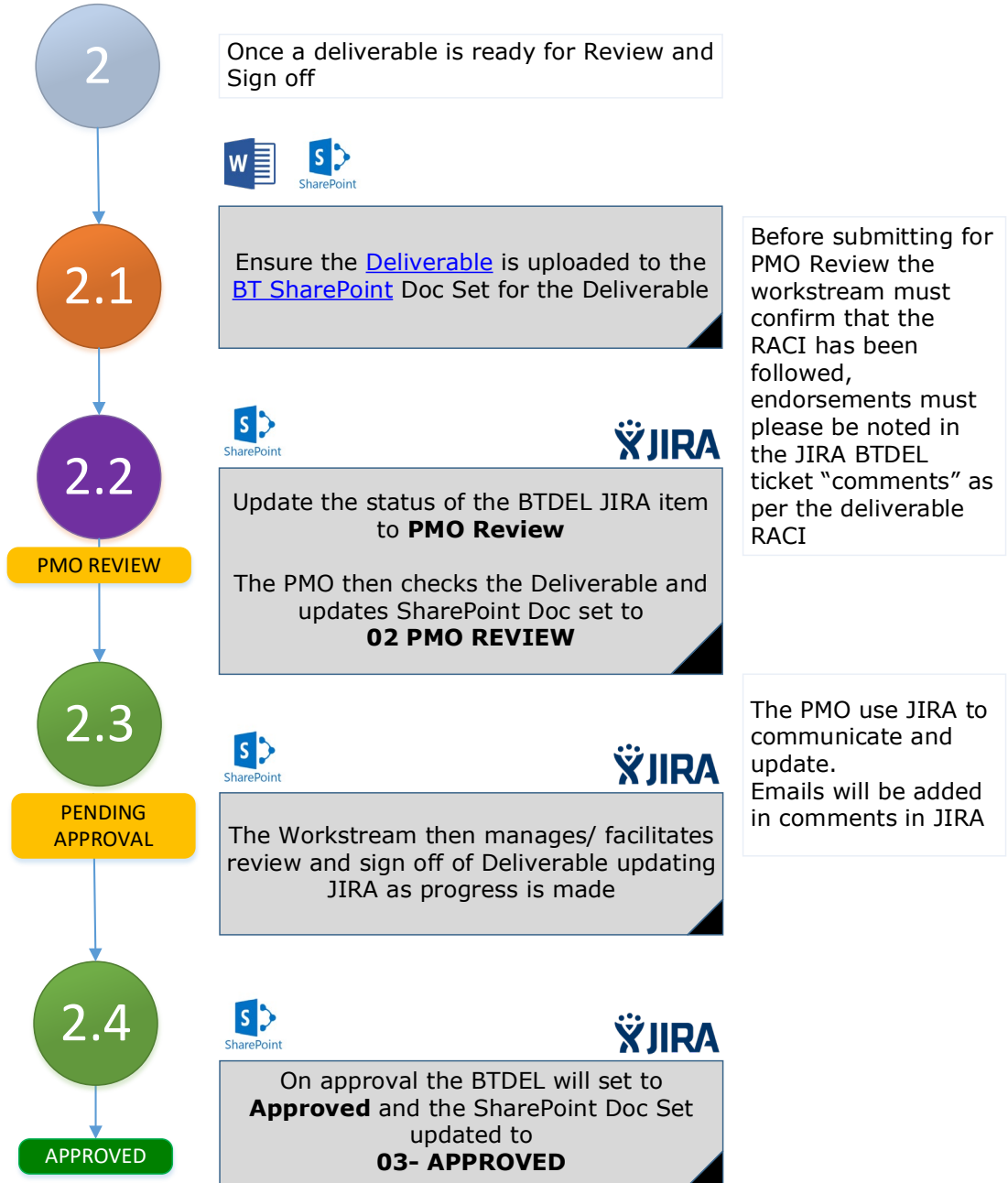
The JIRA deliverable status will be set to **NEW**.

The SharePoint Doc set will be set at **01 – DRAFT.**

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See 3.1 Add Documents to MS **SharePoint from Template**

2 2. Deliverable Sign Off Process

This is the process when the deliverable is ready for the BT PMO to quality review and formally approve.

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Once a deliverable is ready for Review and Sign off

2.1

Ensure the Deliverable is uploaded to the BT SharePoint Doc Set for the Deliverable

Before submitting for PMO Review the workstream must confirm that the RACI has been followed, endorsements must please be noted in the JIRA BTDEL ticket "comments" as per the deliverable RACI

2.2

PMO REVIEW

Update the status of the BTDEL JIRA item to **PMO Review**

The PMO then checks the Deliverable and updates SharePoint Doc set to **02 PMO REVIEW**

The PMO use JIRA to communicate and update.
Emails will be added in comments in JIRA

2.3

PENDING APPROVAL

The Workstream then manages/ facilitates review and sign off of Deliverable updating JIRA as progress is made

2.4

APPROVED

On approval the BTDEL will set to **Approved** and the SharePoint Doc Set updated to **03- APPROVED**

2.1 Ensure all the documents are in BT SharePoint

Ensure the following are uploaded:

- Deliverable document/s – this will be the deliverable itself plus any supporting reports, data sheets, charts, etc)

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2.2 Update JIRA Status to PMO Review

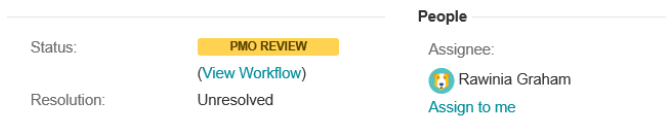Before updating the status in JIRA ensure that you have:

- Saved the deliverable in the *SharePoint Document Set*,
- Linked the deliverable file to the JIRA ticket (get/copy the link from SharePoint), then

Change the status on the JIRA item to **PMO Review**

2.3 BT PMO Document Review

JIRA Deliverables in **PMO Review** will auto assign and generate a notification to the PMO

1. The PMO will update the status of the MS SharePoint Doc Set to **02 - PMO Review**.
2. The PMO will review / QA the deliverable documents in the SharePoint Doc set.

(You may need to Review, Accept or Reject track changes as advised by PMO.)

2.4 Manage Deliverable Approval

The PMO will change the JIRA status to **PENDING APPROVAL.**

- The Workstream will facilitate the approvals by the Responsible and Accountable person(s).
- An email from the approver embedded in the deliverable document or sign-off memo is ideal.
- Endorsement / Approval in the JIRA thread is acceptable.

Once approved and approvals have been embedded in the deliverable/ JIRA. The PMO will:

1. **APPROVE** in JIRA
2. Change the status of the SharePoint Doc set to **03 APPROVED**
3. Save the deliverable as a *major version* in SharePoint
4. Update the **Deliverable Register**

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3   3. Appendix

### 3.1   Add Documents to MS SharePoint from Template

To upload documents,
see Uploading a document into SharePoint

For ease, we suggest you create the templates. This is easier than copying older templates.

1. Go:

   https://irnz.sharepoint.com/sites/BT/deliv

   - Find the Deliverable Doc set which has been created for you by the PMO
   - Open the Doc set
   - Choose **+ New**
   - Choose the template you wish to use:
   - PowerPoint, or MS Word
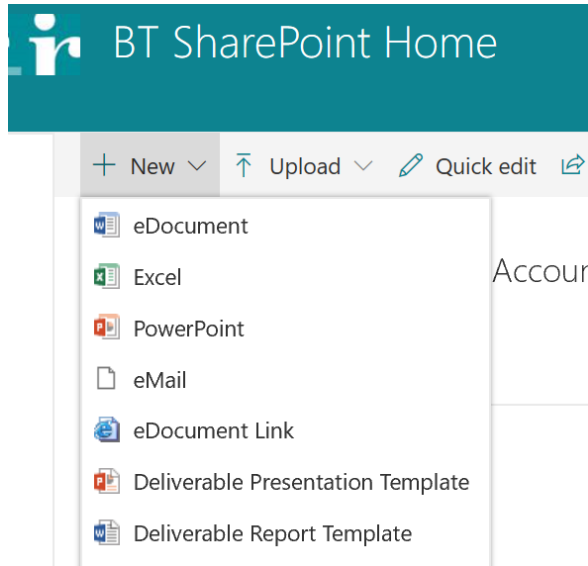
2. The template will open
3. In the Properties on the right give the file a title and
4. Fill in the metadata
5. The **Save**

6. *Name the file: Always start with the deliverable number: D####: Deliverable Name*
7. *Choose the location: BT SharePoint Home > Deliverables*
8. Then click **More save options**
9. Choose the doc set
10. Then **Save**

Alternatively, you can save the document to another location and when ready **upload** it to the doc set.
   - Please remember to do this **from the doc set** location and to **fill in** the metadata.
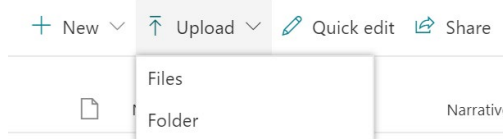
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3.2 Using JIRA to consult

JIRA can be used to mention, log and track activity on the Deliverable. For general information see https://irnz.sharepoint.com/sites/BT/BTTools/SitePages/ JIRA.aspx.

If you want to tag people for consult on a deliverable, please use the consult field.
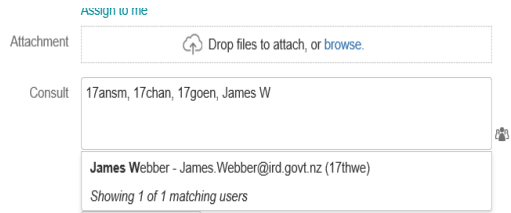
3.3 Deliverable Dashboard in JIRA

Within JIRA there is a Deliverable Dashboard. If you would like to see active deliverables, and their progress, see this link:

> https://jira.nsp.ird.govt.nz/secure/RapidBoard.jspa?rapidView=526.

Many teams include deliverables in their own dashboards. Or, create their own document tracking dashboards that include deliverables and other documents.

If you need help with JIRA dashboards, please contact your Project Coordinator or email BT PMO Tools BTPMOTools@ird.govt.nz

3.4 Viewing Deliverables in MS SharePoint

To find deliverables in SharePoint go to the BT Deliverables Library. https://irnz.sharepoint.com/sites/BT/deliv.

Sensitive deliverables can only be viewed by your team.

Please contact BTPMOTools@ird.govt.nz for assistance with this.

Deliverables can also be viewed by Workstream in other ways.

https://irnz.sharepoint.com/sites/BT/deliv/For ms/Workstream.aspx

See How to use views for more information.

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