Jira User Guide

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Name of approving committee	YHCR Central Team
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Updates

New Version Number	Date	Change
V1	13 September 2021	Independent quality review of draft document to include consistency, branding changes and alignment to local ICS programme methods
V1.1	18 October 2021	Add screenshots of ticket logging screens
V2.0	20th April 2022	Updated document with new screen shots and additional information

Table of Contents

Version Control

Version	Release Date	Released By	Reason for Release
1.0	07/12/2020	Tim Davey	Internal version
1.1	06/05/2021	Tim Davey	Appendix on Clinical Safety added
2.0	20/04/2022		Updated screenshots and information

Reviewers

Initials	Name	Role	Organisation

1 Introduction

1.1 Purpose of this Document

This document provides a brief overview of how to use the Interweave Jira support system.

It is intended for end-users who wish to log tickets and track progress. It does not aim to cover configuration and administration of the system.

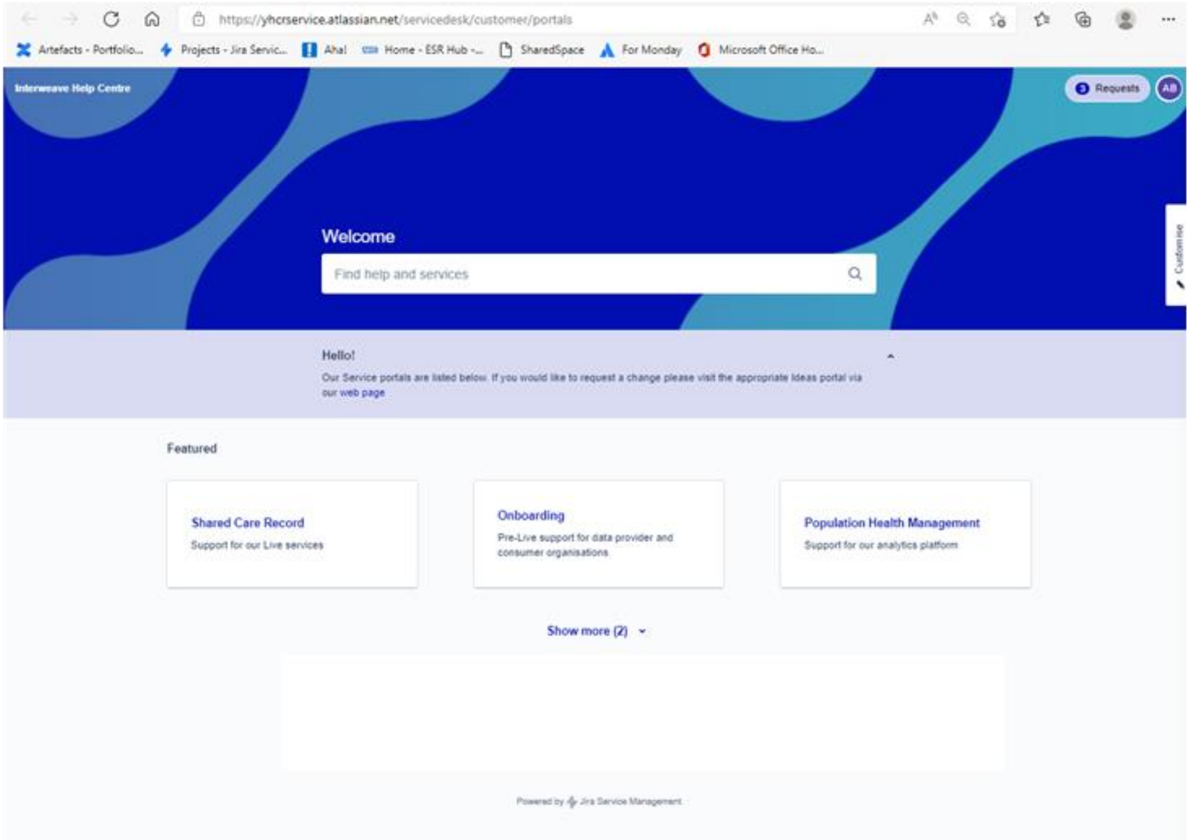
2 User Guide

2.1 Initial Log On

The YHCR customer portal can be found at:
https://yhcrservice.atlassian.net/servicedesk/customer/portals

You will receive an email invite which includes this link when your account is created.

2.2 Front Screen



The front screen has three buttons for:

- **Shared Care Record** – to log live support tickets relating to Interweave Exchange
- **Population Health Management** – to log tickets relating to PHM
- **Onboarding** – to log tickets relating to Interweave Exchange Onboarding and development

Note: depending on your role you may be able to see only a subset of these buttons. If you only have access to one button, then the previous screen is skipped entirely.

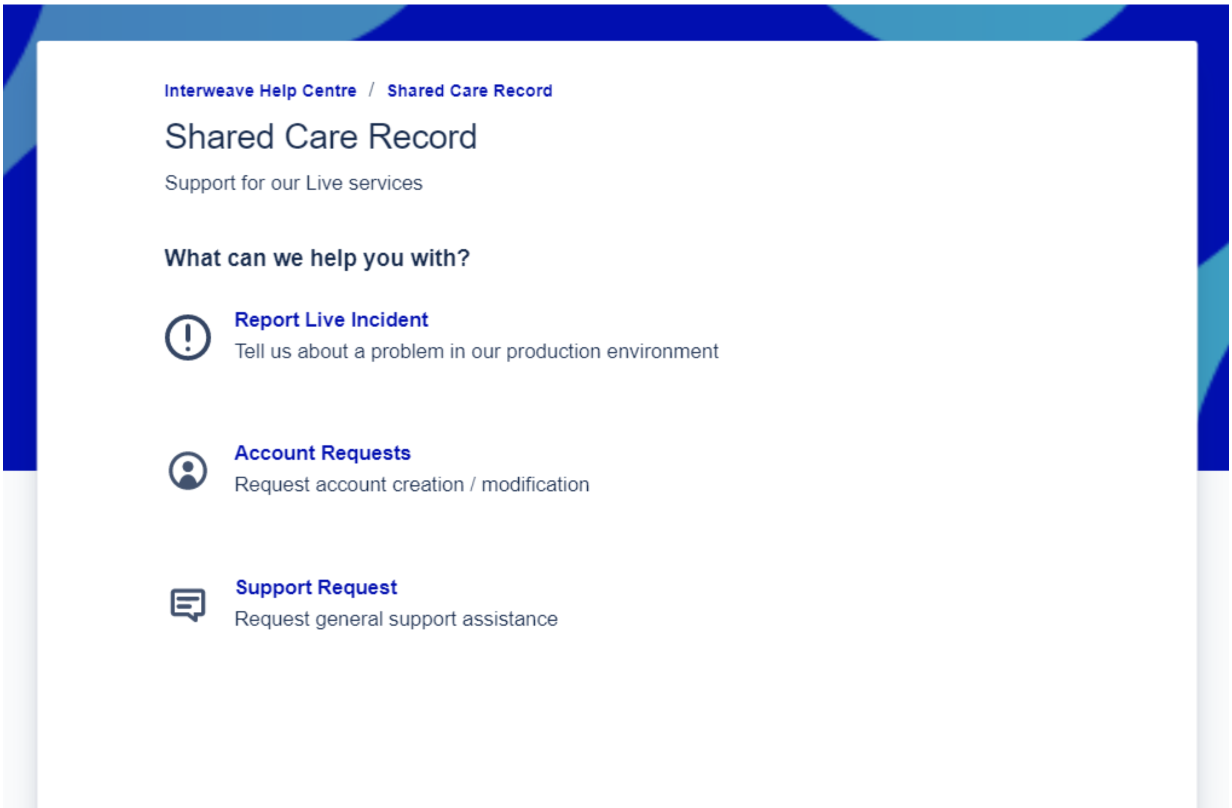
If you do have access to multiple buttons, then please take care to log each issue in the correct place, thus ensuring that the most efficient and appropriate response can be provided.

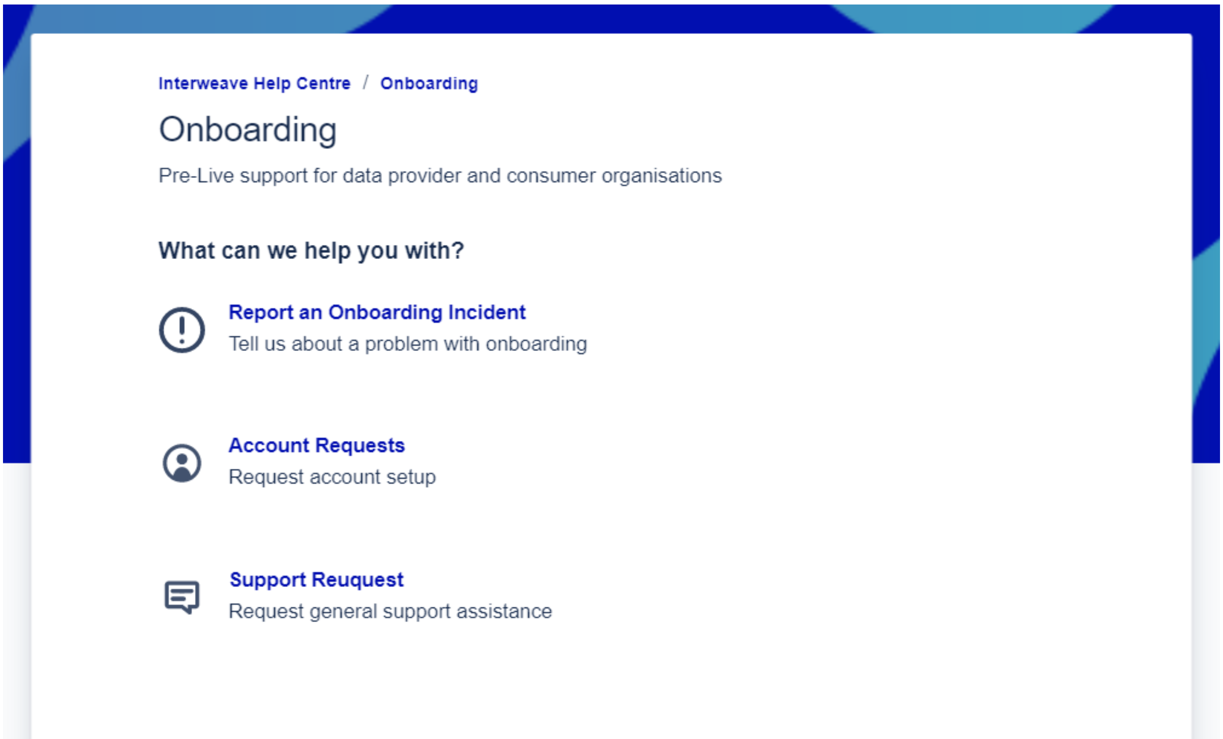
2.3 Raising a ticket

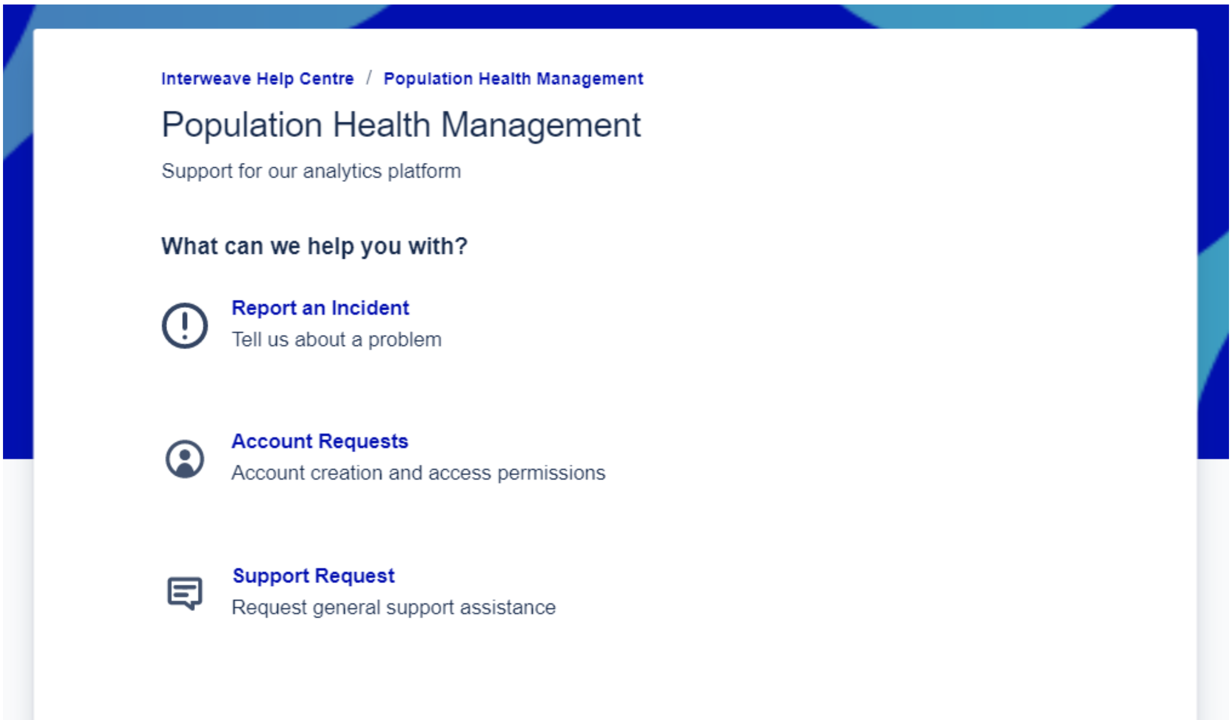
The next screen allows you to choose the type of ticket you wish to raise. This screen varies slightly between the different project areas (see screenshots below), however, the underlying concepts are consistent, namely:

- **Report an Incident** – this is used to report a problem which needs to be fixed. There are response targets based on the priority recorded.
- **Support Request** – this is used to request additional help and assistance, but not linked to an incident per se. The request will be considered and prioritised within the available support capacity.
- **Change Request** – to submit an idea for a future change, to be considered by the Change Advisory Board
- **Access Request** – this is specifically for PHM, to request user permissions to access the system

To raise a ticket, click on the relevant button and complete the form. The fields to fill in are relatively self-evident, however see the Appendix for further details.

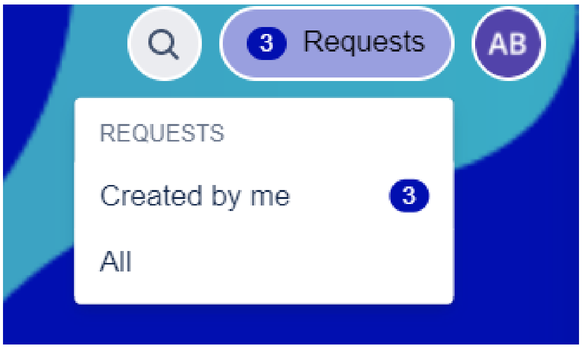



Interweave Help Centre / Onboarding
Onboarding
Pre-Live support for data provider and consumer organisations
What can we help you with?
Report an Onboarding Incident
Tell us about a problem with onboarding
Account Requests
Request account setup
Support Reuquest
Request general support assistance

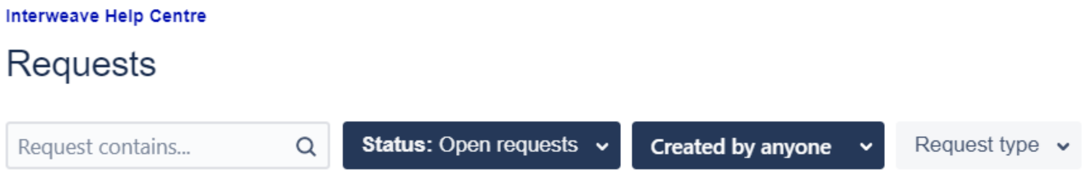

Interweave Help Centre / Population Health Management
Population Health Management
Support for our analytics platform
What can we help you with?
Report an Incident
Tell us about a problem
Account Requests
Account creation and access permissions
Support Request
Request general support assistance

2.4 Finding tickets

The “Requests” button at the top of the screen allows you to find your previously raised tickets



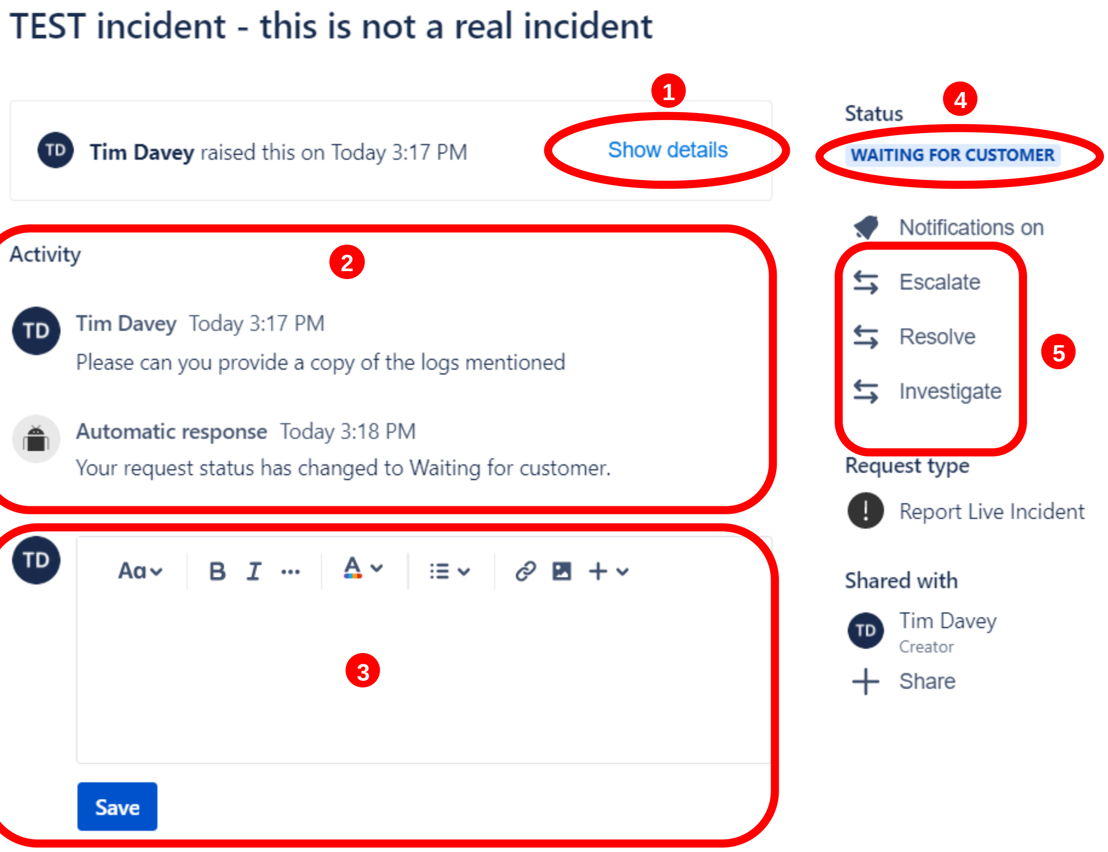
This takes you to a search screen to view requests raised by yourself and/or others in your organisation. Various search criteria can be set, including searching by ID, by text, or by status.



NB: If a request has been “resolved” and returned for testing / confirmation then you may need to look in “Closed requests” to find it.

2.5 Viewing and working with tickets

When looking at a ticket in the portal there are some useful items on the screen to be aware of:



1. **Show details** – click this to display full details, as logged in the original ticket
2. **Activity History** – this lists the history, including any comments and discussion
3. **Comment box** – enables comments and responses to be entered

   NB: If a request is "Waiting for Customer", then entering a comment response here will automatically transfer it back to "Waiting for Support"

4. **Status** – where in the process the ticket is. For example, whether it is waiting for customer action or being progressed by the support team. See the workflow maps in the Appendix to further understand the various status codes
5. **Status action buttons** – these allow other status changes to be made. For example, to escalate a request, or to mark it as resolved or cancelled. Here also is where you can agree with a proposed resolution and close the request

3 Appendix – Detail of Ticket Types

3.1 Incident

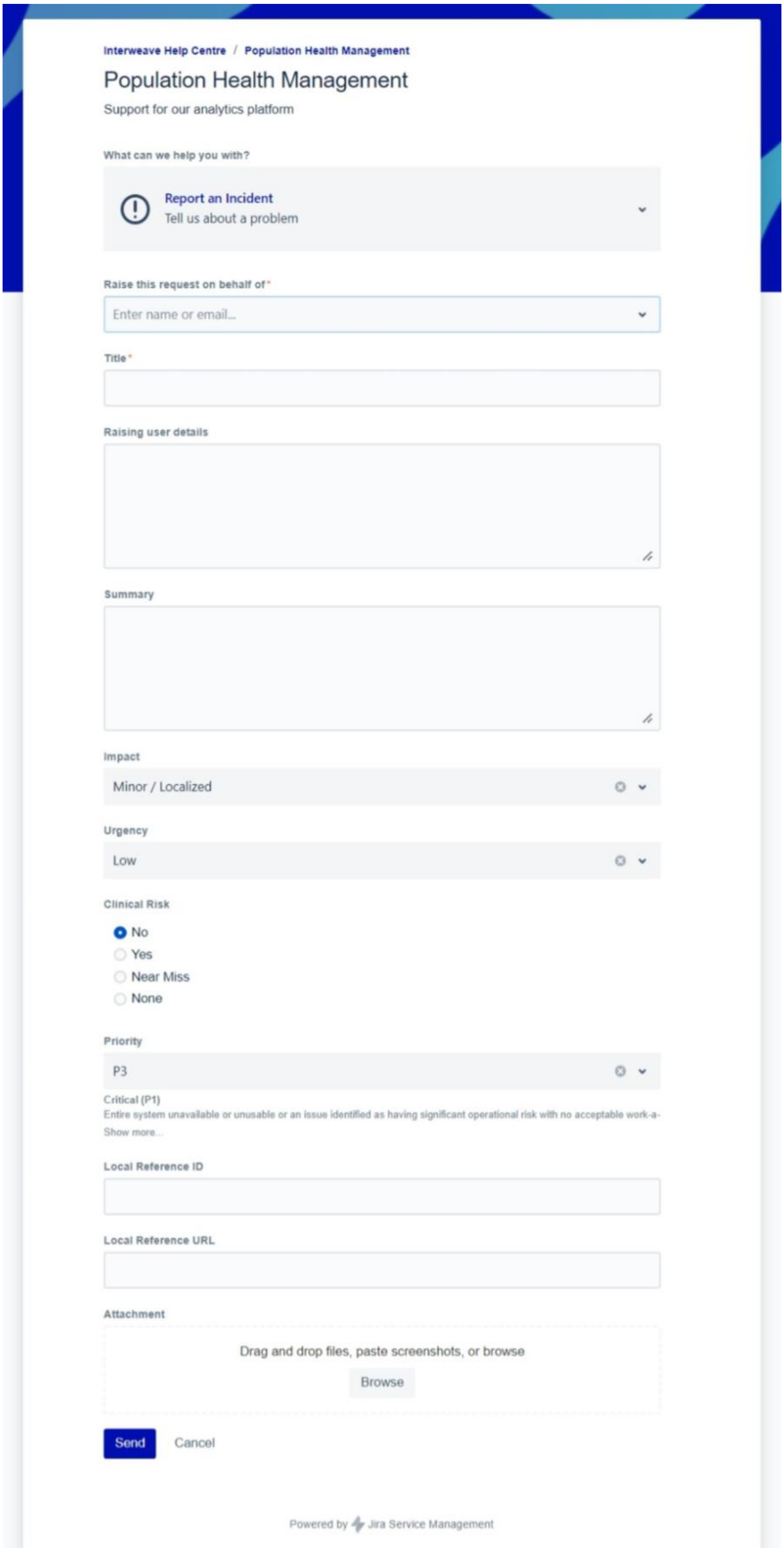
The following fields are involved in logging an incident:

Raise this request on behalf of – defaults to the current user and should normally be left alone

- **Title** – provide a short title for the issue
- **Summary** – describe the problem, including as much detail as possible. As highlighted in the notes on-screen, please take care not to include Patient Identifiable Data in this description
- **Attachment** – for any other attachments. It can be especially helpful to attach relevant screenshots, if possible. Again, please take care not to include Patient Identifiable Data.
- **Priority** – this describes how critical the incident is and drives response time targets. Please see the on-screen prompts for further description. The field defaults to P3 but can be changed – please ensure that the most appropriate priority is selected.
- **Clinical Risk** – a flag to highlight if the issue presents a clinical risk (yes, no, near miss)

The remaining fields are optional and are intended for first line support desk use. (They are therefore not included for all types of requests, e.g. Onboarding)

- **Raising User details** – if the ticket is being logged by a first line support desk agent, then this field can capture details of the originating end user. For example, name, contact details, asset id, etc. If the support desk deals with multiple NHS organisations, then the name and ODS code of the originating NHS organisation must be included. Following consultation, this is a free format text box, thus allowing user details in various formats to be easily pasted in from other support systems.
- **Local reference URL** – a link (if any) to a ticket in another system (e.g. first line support desk)
- **Local reference ID** – the ID of a ticket in another system (e.g. first line support desk)


Interweave Help Centre / Population Health Management

Population Health Management

Support for our analytics platform

What can we help you with?

Report an Incident
Tell us about a problem

Raise this request on behalf of*

Enter name or email...

Title*

Raising user details

Summary

Impact

Minor / Localized

Urgency

Low

Clinical Risk

- No
- Yes
- Near Miss
- None

Priority

P3

Critical (P1)
Entire system unavailable or unusable or an issue identified as having significant operational risk with no acceptable work-a-
Show more...

Local Reference ID

Local Reference URL

Attachment

Drag and drop files, paste screenshots, or browse

Browse

Send Cancel

Powered by Jira Service Management

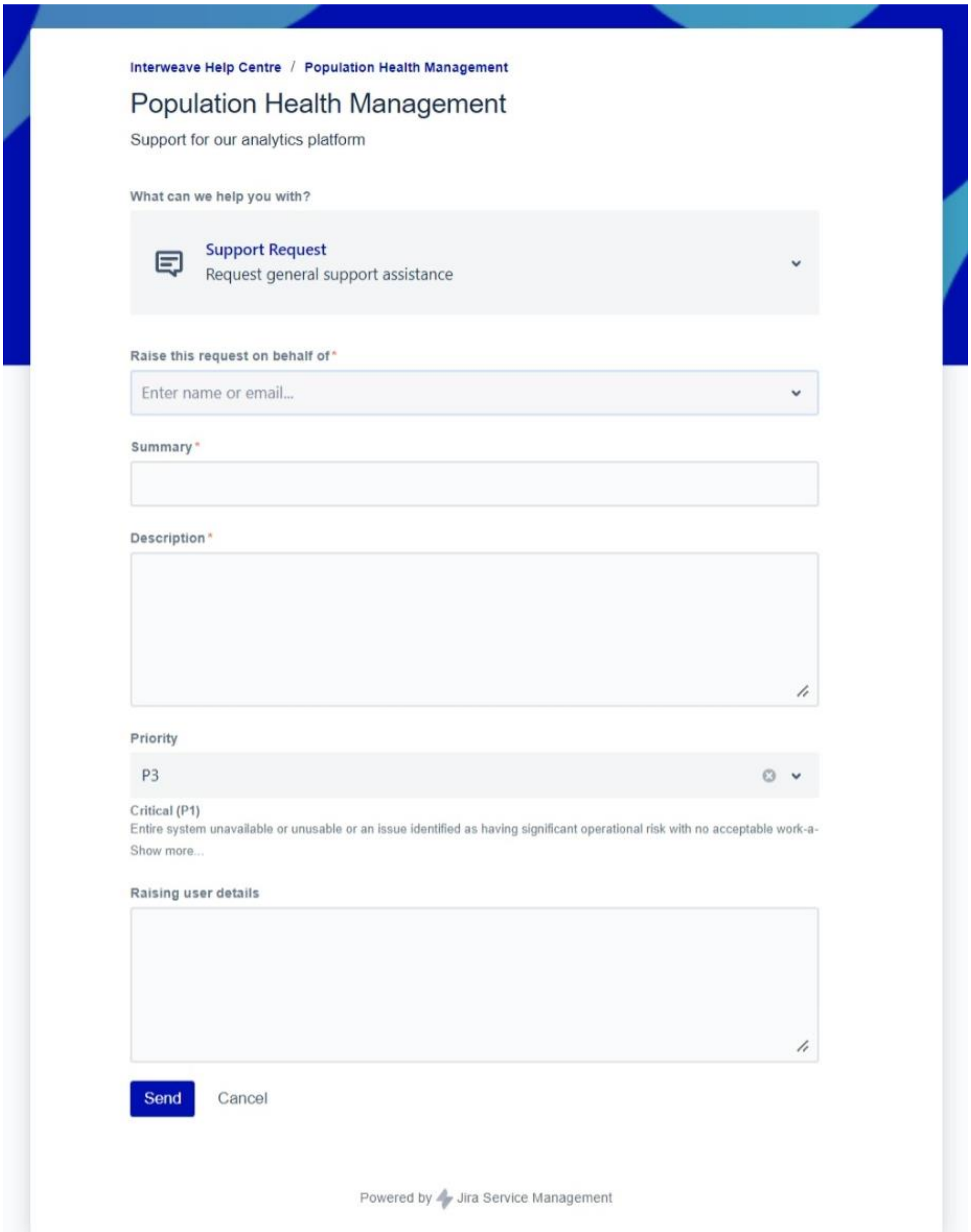
3.2 Support Request

The following fields are involved in making a support request:

Raise this request on behalf of – defaults to the current user and should normally be left alone

- **Title** – provide a short title for the request
- **Summary** – describe the assistance that is requested. As highlighted in the notes on-screen, please ensure not to include Patient Identifiable Data (PID) in this description
- **Urgency** – indicate the urgency of the request (critical, high, medium, low)
- **Attachment** – any further information, screenshots or supporting documents

The remaining fields are optional and enable details of an originating user and external ticket reference to be captured – see "Incident" above for details



3.3 Change Request

The following fields are involved in making a change request:

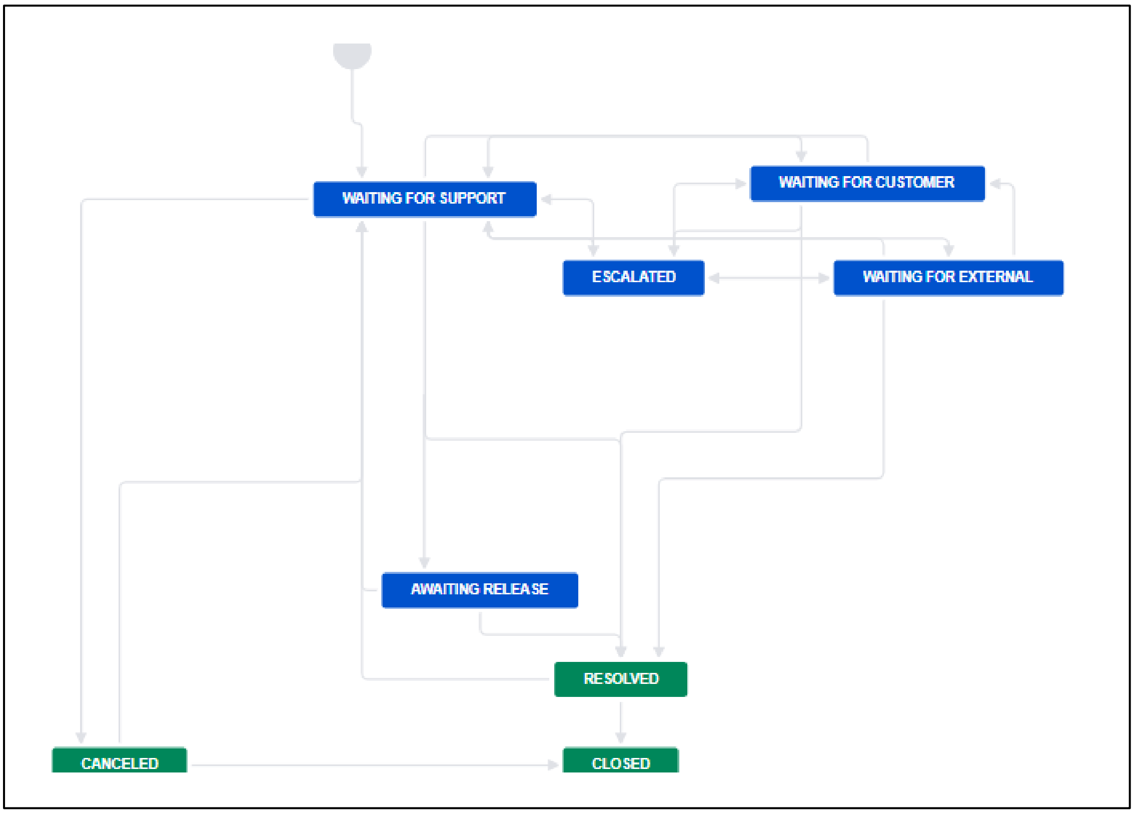
Raise this request on behalf of – defaults to the current user and should normally be left alone

- **Title** – provide a short title for the request
- **Change Type** – this defaults to “Normal” and should normally be left alone.
- **Full Description of Requested Change** – fully describe the change that you would like, i.e. the requirement. This needs to provide enough detail for the Change Advisory Board (CAB) to understand and decide about the change. If necessary, then attachments can be referenced.
- **Change Benefits and Disadvantages** – explain the reasons for the change, including where possible evidence and details of support for the change. It is also useful to highlight any potential risks or disadvantages.
- **Change Required by Date** – indicate the timeframe by which the change needs to be done
- **Attachment** – any further information, screenshots or supporting documents

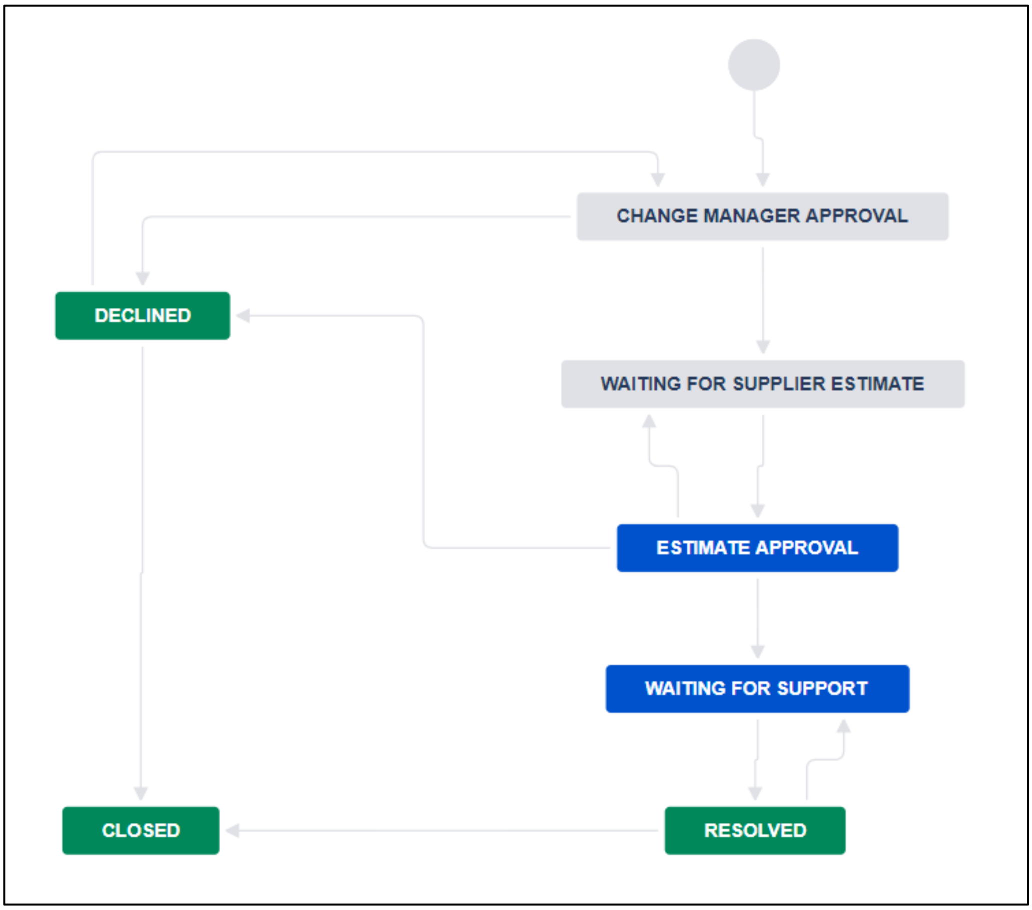
3.4 Workflow definitions

The following workflows define how each type of change moves through the statuses:

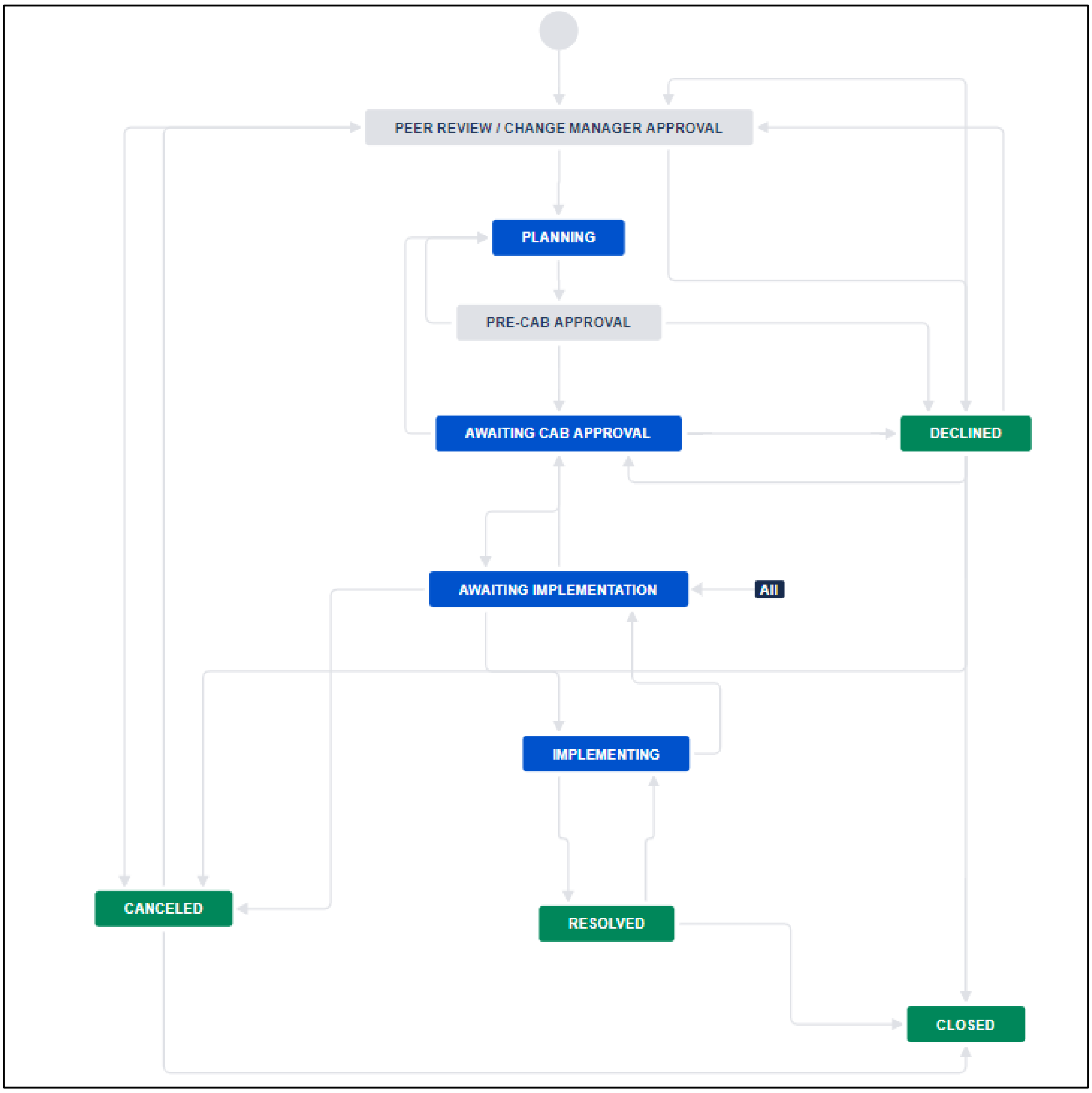
Incident Workflow



Support Request Workflow



Change Request Workflow



4 Appendix – Clinical Safety Incidents

Please refer to the document "***YHCR Clinical Incident Process***" which provides full details of the assessment, reporting, and actions required for clinical safety incidents and near-misses.

Key points of note for this document are:

- Jira is the preferred tool for reporting these events – they should be raised in Jira as an "Incident"
- When logging an incident then it is mandatory to populate the "Clinical Risk" flag with either "No", "Yes", or "Near Miss"
- If the "Clinical Risk" flag is set to either "Yes" or "Near Miss" then an automated email alert is sent to the YHCR Clinical Safety Officer
- An appropriate "Priority" in Jira should be selected based on the clinical safety SAC Score. The following mappings are suggested:

Clinical Safety SAC Score	Jira Priority
SAC-5	P1
SAC-4	P2
SAC-3	P3
SAC-4	P3
SAC-5	P3