Banking Ops Automation – Jira Rules SOP

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Project Name: Banking Ops Automation – Full Access
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Overview 🔗

This SOP documents key Jira automation rules configured under the Banking Ops Automation project. These rules streamline task triage, tracking, and closure in an operations context, demonstrating automation, SLA alignment, and business rule enforcement.

Automation Rules Summary 🔗

Rule Name	Description	Status	SLA / Notes
Auto-Assign Owner for High Priority Tasks	Assigns high-priority tasks to a default owner automatically.	Enabled	SLA: Assign within 2 minutes
Auto-Label High Priority Items for Tracking	Tags high-priority tasks with a `High_Priority` label.	Enabled	SLA: Label within 2 minutes
Auto-Comment on Stagnant Tasks in To Do	Posts reminders on "To Do" items stagnant for 2+ days.	Enabled	SLA: Notify daily at 9:00 AM
Auto-Close Resolved Tasks After 3 Days	Transitions resolved issues to "Closed" after 3 days.	Enabled	SLA: Auto-close at T+3 resolve

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Rule Details 🔗

1. Auto-Assign Owner for High Priority Tasks 🔗

- **Trigger**: Issue created or updated
- **Condition**: Priority = High AND Assignee = Unassigned
- **Action**: Auto-assign to default owner (e.g., queue owner)
- **Audit Log Result**: SUCCESS

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2. Auto-Label High Priority Items for Tracking 🔗

- **Trigger**: Issue created or updated

- **Condition**: Priority = High AND label != High_Priority
- **Action**: Add label `High_Priority`
- **Audit Log Result**: SUCCESS

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3. Auto-Comment on Stagnant Tasks in To Do 🔗

- **Trigger**: Scheduled (daily at 9:00 AM)
- **JQL Condition**: `status = "To Do" AND created <= -2d`
- **Action**: Add comment:

  "Reminder: This task has been open for over 2 days. Please review or update the status."

- **Audit Log Result**: CONFIG CHANGE (To be triggered)

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4. Auto-Close Resolved Tasks After 3 Days 🔗

- **Trigger**: Scheduled (daily)
- **JQL Condition**: `status = "Resolved" AND resolved <= -3d`
- **Action**: Transition issue to **Closed**
- **Audit Log Result**: CONFIG CHANGE (To be triggered)

Testing & Validation Log 🔗

Rule Name	Test Method	Status	Notes
Auto-Assign Owner for High Priority Tasks	Manual trigger + log	✅ SUCCESS	Audit Log ID: 2361251397
Auto-Label High Priority Items	Manual trigger + log	✅ SUCCESS	Audit Log ID: 2361251383
Auto-Comment on Stale To Do Items	Awaiting match	🟣 Pending	Test needs task older than 2 days
Auto-Close Resolved Tasks (3+ days)	Awaiting match	🟣 Pending	Requires resolved task older than 3 days

Audit Log Cleanup 🔗

- Only **SUCCESS** logs were retained for final screenshots.
- **CONFIG CHANGE** entries were excluded from export to maintain clarity.

Attachments / Export Options 🔗

- Export as PDF or Word for interviews.
- Optional: Link to GitHub repo for full traceability.

Final Review Checklist 🔗

- All 4 rules enabled

- Labels and assignment logic tested
- SOP document cleaned
- Ready for interview / recruiter review