



# Leveraging Wikis and Jira for Program Office Types of Work

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# Agenda

**Confluence & Jira – What Goes Where?**

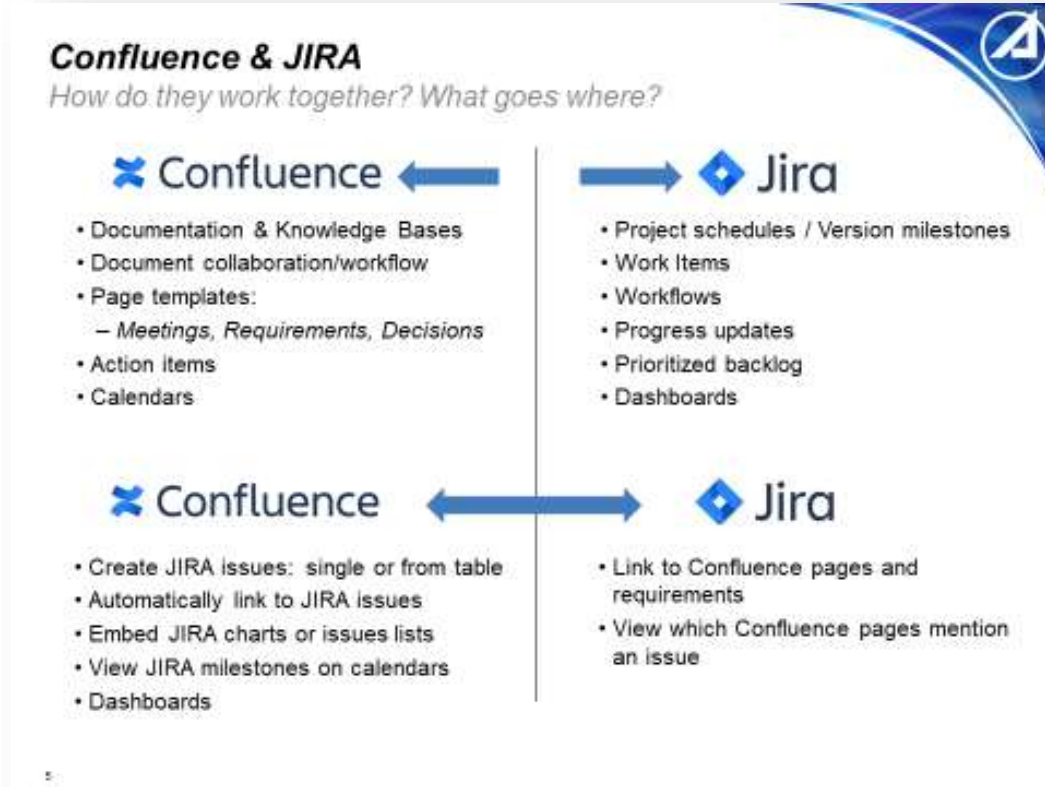
**What kinds of things does a Confluence Wiki support?**

**What kinds of things does Jira support?**

**Tips and Tricks**

# Confluence Wiki & Jira: What Goes Where?

# Confluence Wikis and Jira do Connect, but are Optimized for Different Tasks



From Aerospace Corp presentation “AtlasX Jira Workshop”, Joanne Succeri. Used with permission.

# What kinds of things does a Wiki Support?

# Typical Program Office Needs Supported by a Wiki

## Dashboards:

- One of Confluence Wiki's most powerful features is the ability to bring filtered information from other wiki pages and Jira into a single "report"

## Team Calendaring

## Basic Periodic Reporting

- Pulled directly from task lists
- Entered by team members

## "Fancy" Reporting

- PMRs as an example

## Management Dashboards

- Pulled from Task List
- Pulled from Wiki
  - "exceptions to policy" e.g. missing key information, can be highlighted

## Document Storage and Collaboration

- Templated Documents
- Group-edited documents
- Jira task-associated documents
- Common storage area for documents OR
- Access to documents via a different structure than the Sharepoint (or other) repository structure

# Gimmees and Gotchas of Confluence Wikis

## *Gimmees (things Wikis enable really well)*

- The wiki information structure is completely up to the people who use it
  - Custom templates can mimic reports and documents previously passed around in email
  - Wiki structures can mimic information structures found to be useful in other parts of the project/program
- Visibility into Jira tasks via custom-created dashboards
  - Rather than bloat Jira board with attachments, easy connection to Jira enables documents to be accessed directly but not stored in Jira
- Easy commenting and direct document editing

## *Gotchas (things to be cautious about)*

- The wiki information structure is completely up to the people who use it
  - It's easy to create a structure that becomes difficult to navigate
  - Explicit policies about how the wiki will be used have been a solution in some settings
- Permissions must be actively managed to ensure that users who need information from the wiki have access to it
- MS Word red-lining feature is accomplished differently in wiki document editing

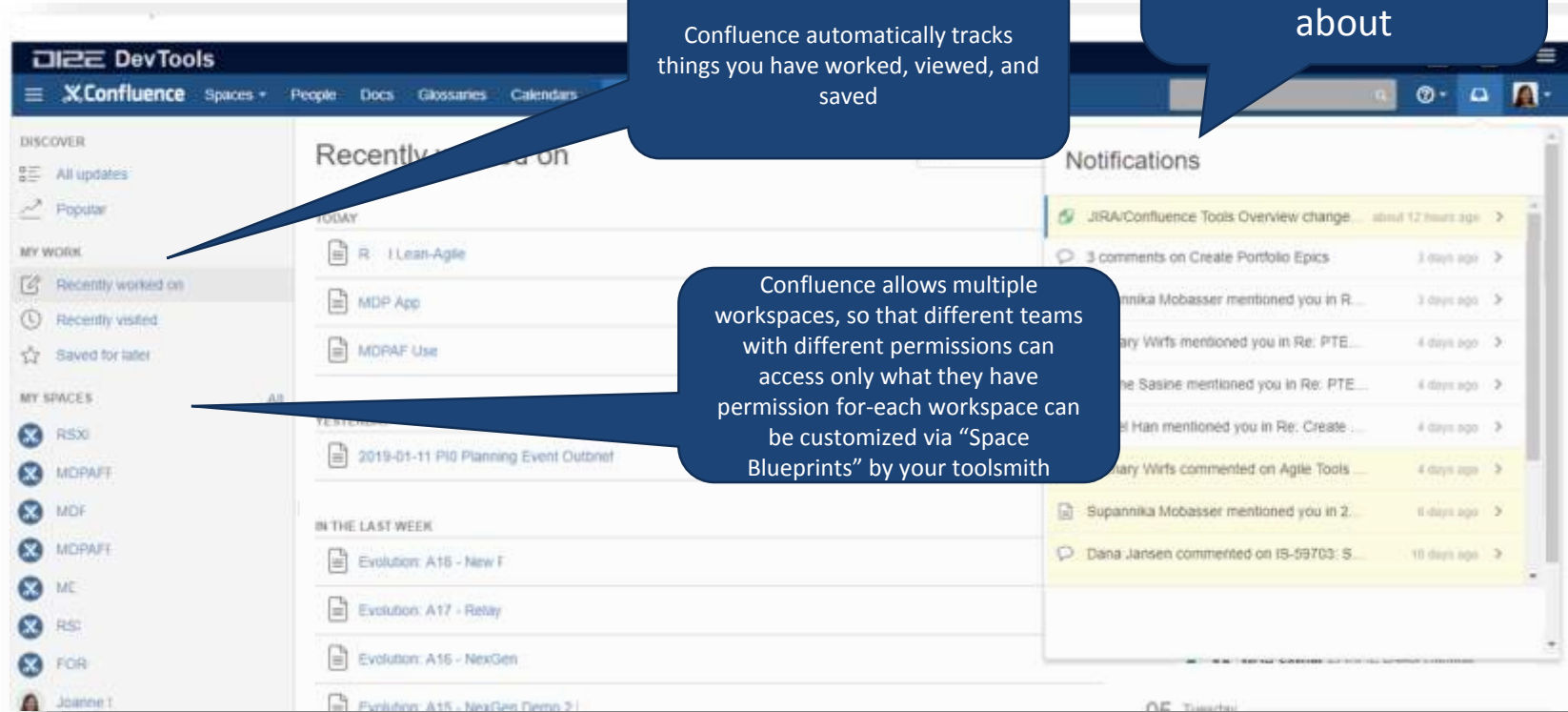


# Example Dashboard for Personal Tasks

Pull notifications about Tasks and wiki pages you care about

Confluence automatically tracks things you have worked, viewed, and saved

Confluence allows multiple workspaces, so that different teams with different permissions can access only what they have permission for—each workspace can be customized via “Space Blueprints” by your toolsmith



# A Project or Team “Home Page” Can Provide Lots of Different Types of Information, Depending on the Project

Confluence | Spaces | People | Create

Agile Adoption in Regulated Settings Home (aka Agile in Government Team)

Created by Bernadette McLaughlin (Manager), last modified by Suzanne Miller on Nov 14, 2018

Line funded research related to Agile Adoption in Regulated (particularly DoD) Settings

Recent space activity

Link to these Pages for Information on Agile Adoption Research and Transition:

[General Information on Agile-related Activities in SSD](#)

The focus of this page has shifted from line-funded research, which ended in FY 15, to transition support activities, currently funded as an SSD Special Project.

The site is being reorganized to separate transition activities from the archive of research topics.

Please contact SuZ Miller, [smg@sei.cmu.edu](mailto:smg@sei.cmu.edu) if you find something you think was here that you can no longer find.

One thing that has changed in how we use this site – for C Development, we mostly are using a SharePoint site.

For courses that we give frequently (e.g. AIG), we use production instructions to provide a spot for administering the files and process them for production. So course “work” won’t show up in the wiki until it’s in production.

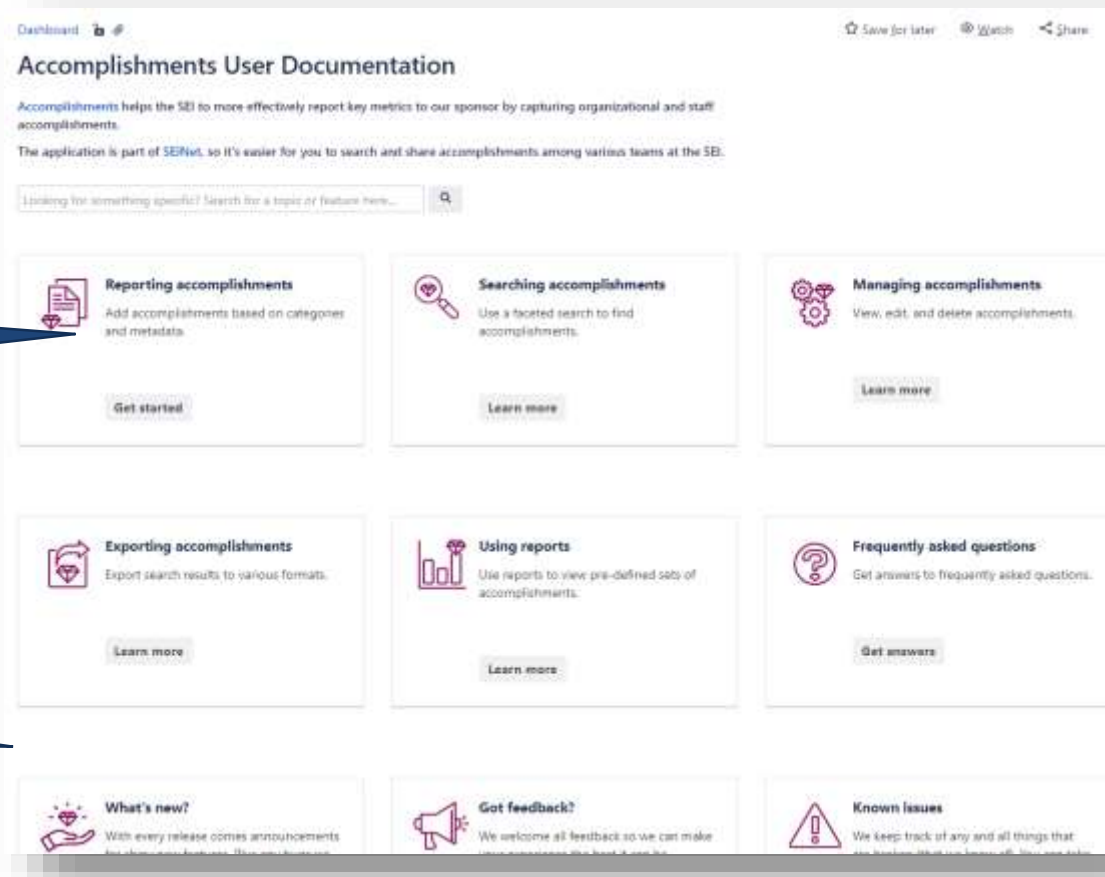
Space contributors

A workspace meant for external as well as internal users can provide links to other wiki spaces, sharepoint sites, Jira boards, etc.

# A Different Way for a Home Page to Redirect Users to Specific Resources

An annotated Table of Contents that takes users directly to that section without having to look through the tree structure on the navigation pane

What's New, Commenting/Feedback, and Issues List available to all users to see



# This Home Page Designed “just for the team” starts with a Team Calendar

Team members can subscribe to different calendars

Different color codes and icons reflect different aspects of the project

*Below the calendar, sections with “Tasks Assigned to Me” and “Tasks I Need to Review” give team members easy access to areas of the Jira board that are relevant to them*

# Basic Periodic Reporting-Pulled from Jira Task Board-1

## Branch Task Report

Created by Jacob Bills, last modified on Nov 15, 2018

This report covers all tasks in the /Branch.

Date	Apr 25, 2018
Issues	724 issues
Status	GREEN

## Division Leadership Watch List

A quick reference list of issues that are currently in work within the Branch that have been marked as important enough to warrant attention from Division leadership. Issues in this filter have had the "Elevate to Division Leadership" option selected in the "Request Action" field. In the future these issues will automatically appear on the IFront Office watch list once it is created.

key	summary	type	created	updated	due	assignee	reporter	priority	status	tasked
-----	---------	------	---------	---------	-----	----------	----------	----------	--------	--------

⚠ Jira project doesn't exist or you don't have permission to view it.  
[View these issues in Jira](#)

## Branch Leadership Watch List

A quick reference list of issues that are currently in work within the Branch that have been marked as important enough to warrant attention from Branch leadership. Issues in this filter have had the "Elevate to Branch Leadership" option selected in the "Request Action" field.

Key	Summary	T	Created	Updated	Due	Assignee	Reporter	P	Status	Tasked Team
-----	---------	---	---------	---------	-----	----------	----------	---	--------	-------------

No issues found [Refresh](#)

Report columns based on data collected as part of Jira task management process

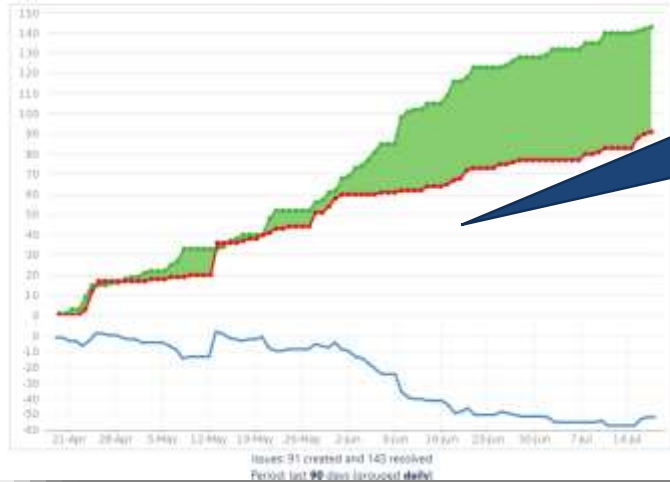
To view content, you must have the right JIRA permissions, not just the wiki page permission

Well designed reports make it transparent as to how filters generate the information you see

# Basic Periodic Reporting-Pulled from Jira Task Board-2

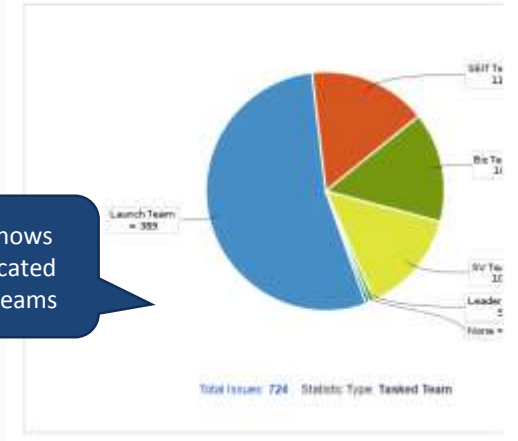
## Created vs Resolved

The top half of the chart shows how many issues have been resolved vs created in the last 90 days across all teams. Green is resolved issues, red is new issues. The bottom half is the average rate at which issues are being either created (positive number) or resolved (negative number). If the red line is above the green then more issues are being created than resolved. If the green is above the red then more issues are being resolved than created.



## Issues by Team

The total number of tasks split out by assigned team. Issues that have no assigned team may require attention as they are likely to be incompletely filled out.



Which measurement reports are selected depends on management needs. Both of these are created “naturally” via the inputs that team members provide as part of their task management activities in Jira. But the report is accessed via the wiki, so people who don’t use Jira regularly can still make use of the reporting information.



# Basic Periodic Reporting-Pulled from Jira Task Board-3

## Overdue Issues

These issues are past their due date.

T	Key	P	Summary	Assignee	Due
<input checked="" type="checkbox"/>	HF-600	↓	SV Screw on	Dimitar Stoyanov	Feb 2019
		↓	Tech Eval	Jacob Bills	Apr 2019
		✓	Study Tech Eval	Gregory Sanders	Apr 2019
		✓	FIST	Dimitar Stoyanov	Apr 2019
<input checked="" type="checkbox"/>	HF-646	↓	Material FOIR	Bryan Mann	Apr 2019
<input checked="" type="checkbox"/>	HF-712	↓	tracking Status of G	Dimitar Stoyanov	Apr 2019
<input checked="" type="checkbox"/>	HF-825	✓	PLA at ASO	Dimitar Stoyanov	May 2019
	HF-851	↑	Online Requirement (Suspense 30 May)	Unassigned	May 2019

Filters are used in the Jira task board to access subsets of the task list that are meaningful to management.

## Late To Start Issues

These issues have past their estimated start date.

T	Key	P	Summary	Assignee	Due	Date - Issue Start
	HF-693	✓	FOIRs and Issues	Nicholas Hyatt	Jan 08, 2020	Feb 05, 2019
<input checked="" type="checkbox"/>	HF-670	✓	Swap Capability	Jonathan Desimone	Sep 25, 2019	Feb 11, 2019
<input checked="" type="checkbox"/>	HF-725	✓	Inclination Study	Gregory Sanders		
<input checked="" type="checkbox"/>	HF-922	↓	REA Tech Eval	Jacob Bills		
<input checked="" type="checkbox"/>	HF-847	✓	Transition to Sustainability	Angela Sims	Oct 25, 2019	
<input checked="" type="checkbox"/>	HF-673	↓	Spec Letter	Jesse Cole	Oct 18, 2019	Apr 28, 2019

The blue text indicates an active link to a specific task in the Jira board.

Getting into the details (as needed) is also possible from the wiki, by pulling filtered reports in from Jira

# Basic Periodic Reporting: Entered by Team Members

Weekly reporting accomplished by using a wiki page template.

User name is a link to summary of user assignments and activity

Team can individually edit page to enter activity into report.

May 27 - 31 2019

Created by Crisanne Nolan, last modified by Richard G. Turner on May 31, 2019

If a project is new/not listed, please add it. Always use the last week's notes as the template for the next week

## General AAT Team Updates

AMP (Team: [@Nanette Brown](#) [@Suzanne M Miller](#) )

ARDE (Team: [@Nanette Brown](#) [@William S Hayes](#) )

## Podcasts

[@Eileen Wrubel](#) :Kristi Roth, our new intern, has agreed to participate in the Women in SW & Cyber series. Eileen & Heidi Brayer coordi

## Conferences

[@Eileen Wrubel](#) : Keith Korzec connected with the PEO at ADAPT, and the PEO has reached out to him to talk about what is happening. Keith is working with Matt Milazzo to get an understanding of the technical picture

vel/PTO next week:

[enter S Capell](#) LSAIG delivery



# Basic Periodic Reporting: Individual Task Summary

**SuZ Activities**  
Created by Suzanne M Miller yesterday at 04:51 PM

Description	Due date ↓	Assignee	Task appears on
<input type="checkbox"/> @ Suzanne M Miller		Suzanne M Miller	2019-07/9-10 Note: D (MP)
<input type="checkbox"/> @ Suzanne M Miller: See if we could use an SEI Jira instance to prototype ways of managing the tasking for the Work Stream groups		Suzanne M Miller	2019-06-05 Meeting Note: (Suzanne M Miller) Status/Moving Forward)
<input type="checkbox"/> @ Suzanne M Miller: See if we could allow Brigid/Kate to access an internal SEI Jira/Confluence instance (from one of Hasan's instances?) @ Suzanne M Miller: connect Brigid with Matt Gettis to see about getting access to his AEHF and ARC projects on OIGE-note. SuZ told Brigid about the planned demo of the AEHF Launch Ops board at the RAF next week		Suzanne M Miller	2019-06-05 Meeting Note: (Suzanne M Miller) Status/Moving Forward)
<input type="checkbox"/> @ Suzanne M Miller: send adoption considerations map to jeff and major tangle		Suzanne M Miller	2018-05-04 Meeting notes
<input type="checkbox"/> sdfsdsdf @ Suzanne M Miller		Suzanne M Miller	checklist example:
<input type="checkbox"/> @ Suzanne M Miller: expand this with additional context/info (sorry, I have to run to a meeting before finishing this)		Suzanne M Miller	Socializing More Robust Defn of Done from Iteration through VS
<input type="checkbox"/> @ Suzanne M Miller: - contact Katie in Events to help us find the right venue in DC		Suzanne M Miller	Workshop Design Kickoff Oct 16, 2014
<input type="checkbox"/> design and conduct a workshop with both academic and government program office participation to solicit and synthesize ideas: @ Suzanne M Miller @ Forrest J Shull @ Unknown User (mlapham)		Suzanne M Miller	Agile Success Measurement
<input type="checkbox"/> @ Suzanne M Miller: will send Karen Hayes-Ryan enterprise agile briefing		Suzanne M Miller	2014-04-30 Task 2 Metrics Meeting

Link to page with complete context of task – meeting notes, checklists, etc.

Report summarizes tasks assigned to a team member on other wiki pages.

# Fancy Reporting: Tabbed Program Management Review without Powerpoint!

Dashboard / Branch Home / JIRA reports

UNCLASSIFIED//FOR OFFICIAL USE ONLY

## Branch PMR Report

Created by Jacob Ellis last modified by Elizabeth Fortson on Mar 06, 2019

Material Leader Integrated Master Schedule (IMS) SV Production Team xSEIT i Bi Ops Team Launch Team 6 SEIT U PMR Testing Page

Launch Team:

Summary	Start Date	End Date
DHF S - Mission Readiness Review	Apr 12, 2019	Apr 12, 2019
DHF S - Ground Readiness Review	Apr 16, 2019	Apr 16, 2019
DHF S - MLBERAp (	Apr 20, 2019	
DHF S - Confidence Test	Apr 29, 2019	
DHF S - iFuel	May 08, 2019	
DHF S - Load Complete	May 22, 2019	
DHF S - Integrated i Exercise 2	May 22, 2019	
DHF S - Make	May	
DHF S - Snaps	Jun 05, 2019	Jun 13, 2019
DHF S - Readiness Review	Jun 13, 2019	Jun 13, 2019
DHF S - i Integration Facility		Jun 14, 2019
DHF S - i Dress Rehearsal		Jun 20, 2019
DHF S - Executive Review		Jun 21, 2019
DHF S - Readiness Review		Aug 05, 2019
DHF S - ULA i Review		Aug 05, 2019
DHF S - Initial Capability i		Aug 08, 2019

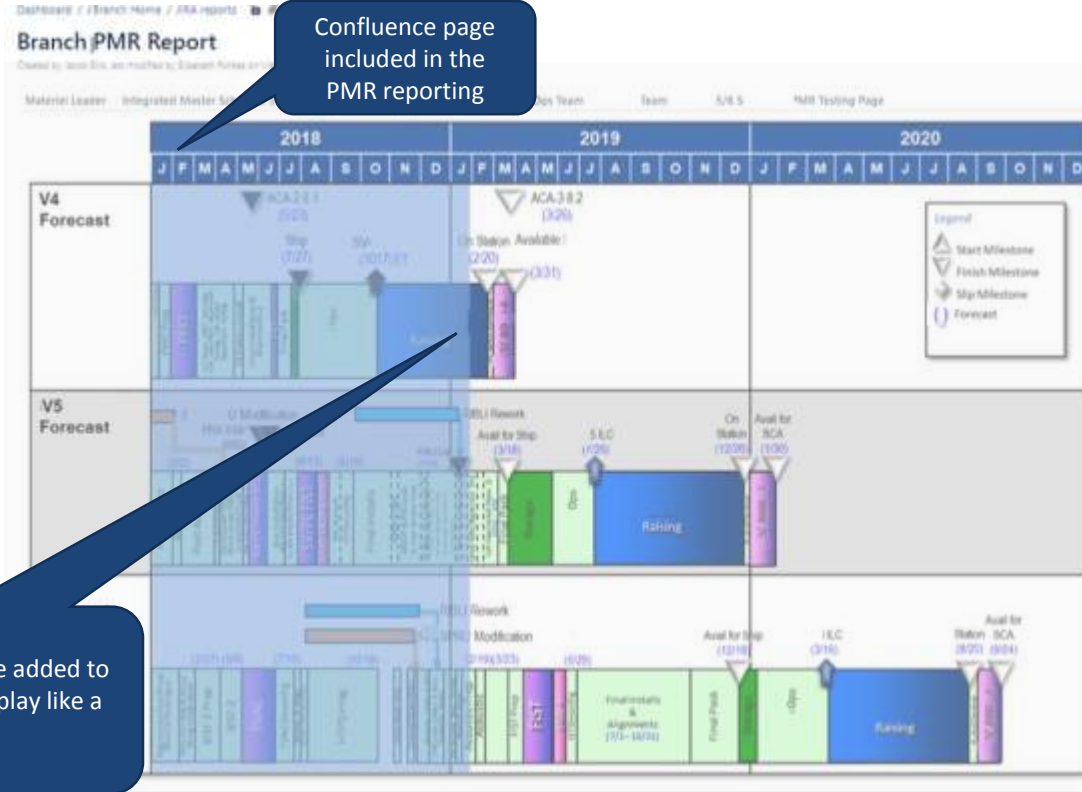
16 Issues Refresh

Callout 1: Tabs are links to other wiki pages with PMR report elements

Callout 2: Automated data gathered in report from Jira activity

Callout 3: Links to view more granular reporting if requested

# Fancy Reporting: Simulating Powerpoint



# Management Dashboards

## Monthly Financial/Budget Data

Created by Brian David Benestell, last modified on Jul 16, 2019

### Financial Reports

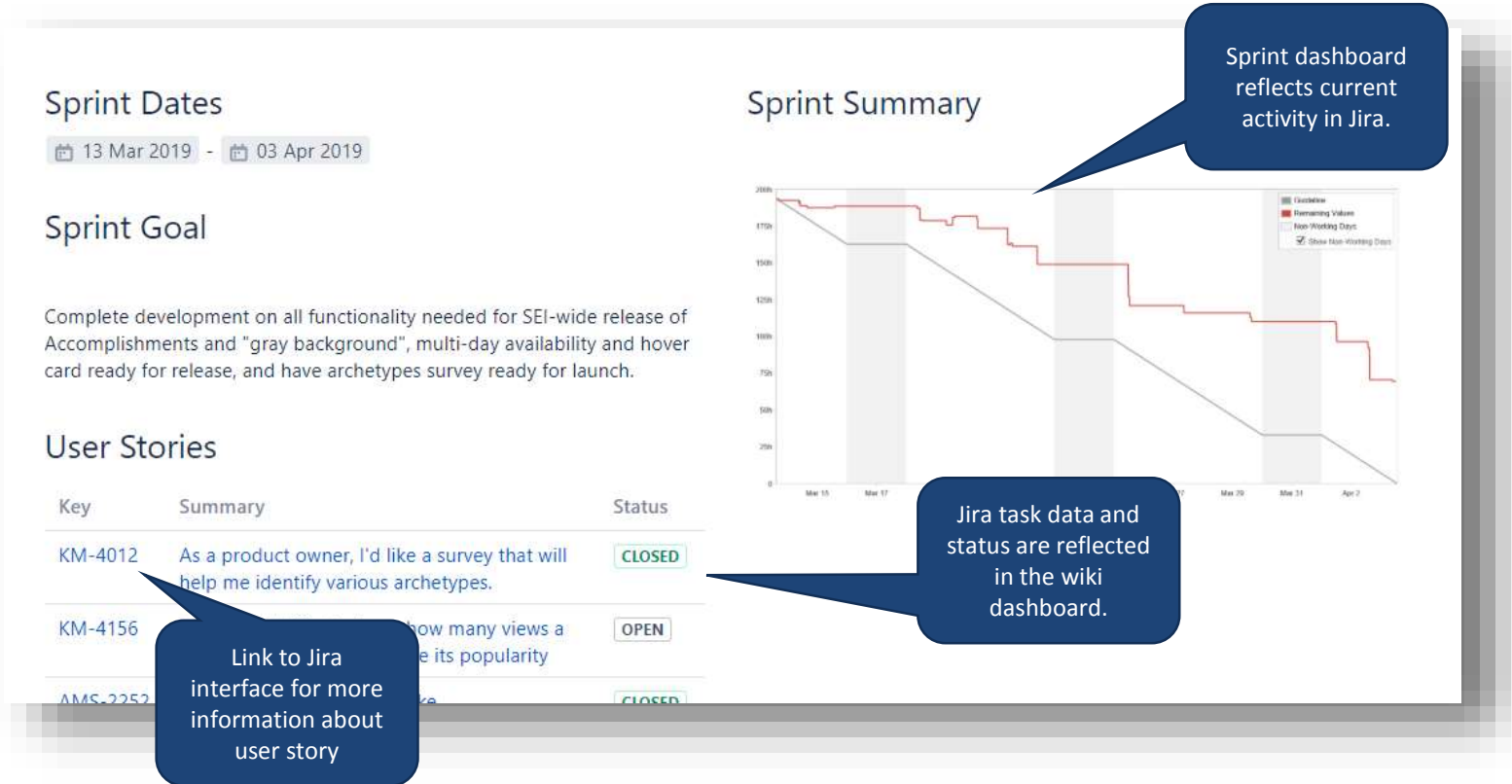
### FY19 Reports

Data to build report comes from this month's financials	Variance Reports	Financial Reports		
	Pre-Close	CEI	DH	Spend Plan Charts
Description of file	Budgeted FTE vs. effort entered into MIS at month	Funding, expenses, and forecast data	Funding, expenses, and forecast data	PWP and subtask-level graphical representations of
Approx. distribution date*	2-3 days before month-end	10th of the month	10th of the month	15th of the month
Jun '19	<a href="#">Jun '19 Budget vs Planned.xlsx</a>	<a href="#">FY19 Monthly Financials - Jun19 2nd Close.xlsx</a>	<a href="#">June FY19 Actuals Monthly 2nd Close.xlsx</a>	<a href="#">Jun19</a>
May '19	<a href="#">May '19 Budget vs Planned.xlsx</a>	<a href="#">FY19 Monthly Financials - May19.xlsx</a>	<a href="#">May FY19 Actuals Monthly.xlsx</a>	<a href="#">May19</a>

Summary of reports and links to documents built into Confluence dashboard

Dashboard updated at specified frequency

# Management Dashboards: Pulled from Jira Task Boards



# Management Dashboards: Pulled from Wiki

**Decision log**  
Created by Vijay Sai Vadlamudi, last modified on

Dashboard provides summary of decisions recorded in wiki

Create decision

Button to add new decision wiki page using template

Link to view wiki page about decision

Decision	Status	Stakeholders	Outcome	Due date	Owner
<a href="#">PCS Form Statuses</a>	IN PROGRESS	@ Bernadette Ledwich @ Michael A Wright @ Debbie Spear			@ Danielle L Edwards
<a href="#">System/Role Terminology</a>	DECIDED	@ Bernadette Ledwich @ Michael A Wright @ Debbie Spear	See roles specified below.		@ Danielle L Edwards
<a href="#">PCS Statuses</a>	DECIDED	@ Bernadette Ledwich @ Michael A Wright @ Debbie Spear	Will use the statuses below.		@ Danielle L Edwards
<a href="#">PCS Numbering</a>	DECIDED	@ John Zekany @ Stephen Patrick Cooney	In order to maintain consistency, the PCS number will be the same number as the PR with 'PCS-' appended. For	12 Mar 2019	@ Danielle L Edwards

*This wiki page generates high level summary of key information from other wiki pages documenting Team Decisions.*

# Using Management Dashboards to Enhance Learning about Team Policies

Viewing Confluence page reporting Jira tasks with incomplete information can help to identify when policies are not followed. Example: policy is that *'all tasks must be assigned to someone on the team'*.







T	Key	Summary	Assignee	Reporter		Resolution	Created	Updated	Due
<input checked="" type="checkbox"/>	WICYS-20	Local Sponsorship Outreach	Unassigned	Aaron Marc Detwiler		Unresolved	16/May/18	17/May/18	31/May/18
<input checked="" type="checkbox"/>	WICYS-19	Manage WICYS Website	Unassigned	Aaron Marc Detwiler		Unresolved	16/May/18	17/May/18	31/May/18
<input checked="" type="checkbox"/>	WICYS-18	Announcements/Outreach	Unassigned	Aaron Marc Detwiler	✓ BACKLOG	Unresolved	16/May/18	17/May/18	31/May/18
<input checked="" type="checkbox"/>	WICYS-17	Determine Announcement and Outreach Comms Plan	Unassigned	Aaron Marc Detwiler	✓ BACKLOG	Unresolved	16/May/18	17/May/18	31/May/18
<input checked="" type="checkbox"/>	WICYS-16	Co-Chair Visit of the Wyndham	Unassigned	Aaron Marc Detwiler	✓ BACKLOG	Unresolved	16/May/18	17/May/18	31/May/18
<input checked="" type="checkbox"/>	WICYS-15	Kick-Off Meeting	Unassigned	Aaron Marc Detwiler	✓ BACKLOG	Unresolved	16/May/18	17/May/18	31/May/18

Report of Jira tasks with no assigned owner.

Links open Jira task detail summary

# Document Storage and Collaboration

Starting with MVPr assets, but can include other things as we move along

File	Modified *
 <a href="#">MVPr 20190219.zip</a> This contains "batch 1" of the MVPr artifacts	Jul 22, 2019 by <a href="#">Suzanne M Miller</a>
 <a href="#">Simplified MVPr 20190117 compressed.mmap</a> this is the current set of topics	Jul 22, 2019 by <a href="#">Suzanne M Miller</a>
 <a href="#">MVPr v3.pptx</a>	Jul 22, 2019 by <a href="#">Crisanne Nolan</a>
 <a href="#">MVPr Starter Topics.mmap</a>	about 4 hours ago by <a href="#">Crisanne Nolan</a>
 <a href="#">Suggested Interactions for Getting M</a>	about 3 hours ago by <a href="#">Crisanne Nolan</a>
 <a href="#">2.1.4 Sanitized Starter.docx</a>	just a moment ago by <a href="#">Crisanne Nolan</a>

**Labels**  
No labels

Version history

Version 2 (current version)	Modified by <a href="#">Crisanne Nolan</a>	less than a minute ago
Version 1	Created by <a href="#">Crisanne Nolan</a>	3 minutes ago

[Preview](#) [View](#) [Properties](#) [Delete](#)

Drag and drop to upload or [browse for files](#)

Blue text is link to downloadable file stored in wiki

Ad hoc labels allow metadata searches

Item can be expanded for properties and version history.

Team members with permission can add files



# Doc Storage/Collab: Templated Documents

## Communication Plan

Created by Melissa Ludwick, last modified on Apr 05, 2018

### Communication Plan: External

Receiver	Information	Method	Timing or Frequency	Sender

Template documents can be copied whenever a new instance is required.

### Communication Plan: Internal

Receiver	Information	Method	Timing or Frequency	Sender

Structure of template encourages consistency as data is inserted.

# Doc Storage/Collab: Group-edited Documents

**May 20 - 24 2019 Weekly Accomplishments (AAT)**  
Created by Crisanne Nolan, last modified by Suzanne M Miller on May 22, 2019

General AAT Team Updates

AMP (Team: @Nanette Brown @Suzanne M Miller)

- @Nanette Brown @Suzanne M Miller working on follow-on tasks from RFA

F-22 (Team: @William S Hayes @Suzanne M Miller @Crisanne Nolan)

- Team working with customer to finalize agenda, speakers, invitation for Rapid Acquisition Forum

F-35 (Team: @William S Hayes @Richard G Turner @Suzanne M Miller @Eileen Wrubel @Crisanne Nolan)

- @Richard G Turner continue working on roles and responsibilities
- @Suzanne M Miller @Crisanne Nolan coordinate transcription activities from F35 SW Modernization Summit sessions
- @William S Hayes engaging LM RTE about PI Planning
- @Crisanne Nolan completed 2.3 Retrospective meeting summary report

Collaboration Efforts

3DEL (Team: @Suzanne M Miller)

- Working with Colleen on training needs

**Page History**

Compare selected versions

Version	Published	Changed By	Actions
<b>CURRENT (v. 11)</b>	Jun 25, 2019 11:46	Peter S Capell	
v. 10	Jun 25, 2019 11:38	Peter S Capell	Restore Delete
v. 9	Jun 25, 2019 11:34	Peter S Capell	Restore Delete
v. 8	Jun 22, 2019 10:42	Eileen Wrubel	Restore Delete
v. 7	Jun 22, 2019 08:14	William S Hayes	Restore Delete
v. 6	Jun 21, 2019 14:14	Richard G Turner	Restore Delete
v. 5	Jun 21, 2019 09:39	Crisanne Nolan	Restore Delete

Any team member can edit content of page.

Document can be modified and shared by team members.

Tagging other users supports search and notifications

Links to view a previous version of the edited page

Possible to restore an earlier version of the page

# Doc Storage/Collab: Jira Task-Associated Documents

## SEI InfoBytes

Created by Damon Morda, last modified by Shane P McGraw on Jun 26, 2019

### Overview

InfoByte videos provide a quick, informative summary to inform, educate, and raise awareness about an important SEI topic. They cover a wide range of topics from ongoing initiatives and information security to learning more about the internal applications we use to get our work done here at the SEI.

A few examples of topics might include:

- keeping your computer and other digital devices secure and in compliance with federal regulations,
- using the SEI's video conferencing capabilities, and
- understanding how the SEI differs from other federally funded research and developm

Suggestions for topics should be sent to [infobytes@sei.cmu.edu](mailto:infobytes@sei.cmu.edu).

### Documentation

- Procedures - SEI InfoBytes
- Scripts - SEI InfoBytes
- Schedule - SEI InfoBytes

Wiki page links to documents for team review

Jira task links to Confluence Wiki page where document files are accessed—keeps Jira performance from degrading

### Team

- @Rosemary J Darr
- @John (Jay) W Huber
- @Shane P McGraw
- @Lizann Stelmach
- @Bill Thomas

The screenshot shows a Jira issue in the 'Knowledge Management' project, ID KM-2622. The issue title is 'Create a Confluence template for InfoByte scripts'. It is a 'Task' with 'Minor' priority, 'None' affects versions, 'Documentation - All' components, 'None' labels, and is in the 'KM Sprint 36 - Lucky Bucket' sprint. The status is 'CLOSED' with a resolution of 'Done' and fix version '1.19.4'. The 'Issue Links' section shows a link to the Confluence Wiki page 'Scripts - SEI InfoBytes'.

Details	
Type:	Task
Priority:	Minor
Affects Version/s:	None
Component/s:	Documentation - All
Labels:	None
Sprint:	KM Sprint 36 - Lucky Bucket
Status: CLOSED	
Resolution:	Done
Fix Version/s:	1.19.4




Issue Links	
Wiki Page	Scripts - SEI InfoBytes

# Doc Storage/Collab: Common Storage Area

## Forms

Created by Christopher Baum, last modified on Oct 17, 2018

Forms that appear in the wiki space

File ^	Modified
>  <a href="#">Authorization for Employee Expense.pdf</a>	Feb 14, 2019 by <a href="#">Cait Batchelor</a>
>  <a href="#">Checklist - Invoicing and Accounts Receivable</a>	Jan 03, 2019 by <a href="#">Cait Batchelor</a>
>  <a href="#">Taxable Reimbursement Form.pdf</a>	Jan 03, 2019 by <a href="#">Cait Batchelor</a>
>  <a href="#">Communication Allowance Form.pdf</a>	Jan 09, 2019 by <a href="#">Cait Batchelor</a>
>  <a href="#">Effort Project Budget Template.xls</a>	Jan 03, 2019 by <a href="#">Cait Batchelor</a>
>  <a href="#">Express Shipping Request Form.doc</a>	Jan 03, 2019 by <a href="#">Cait Batchelor</a>

Wiki page stores  
related files  
(e.g., .PDF, .XLS,  
.DOC)

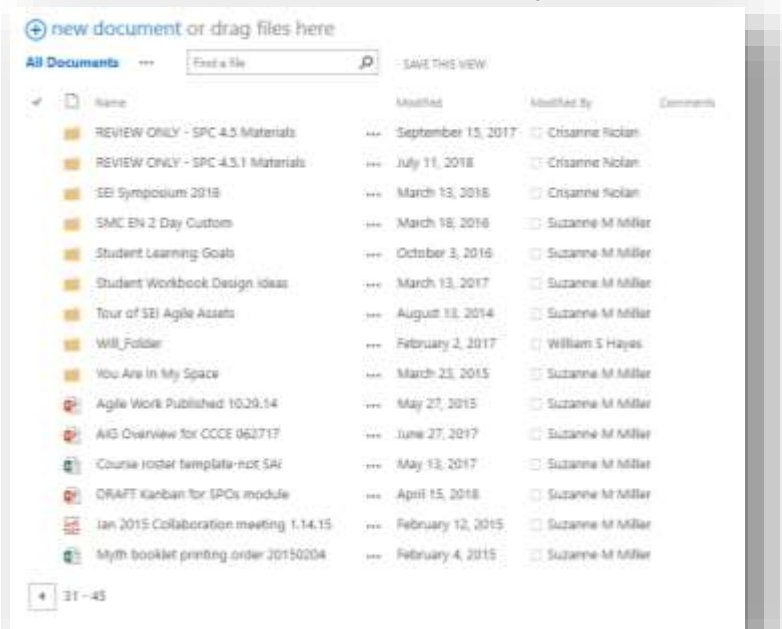
Provides version  
control

Other wiki pages and Jira tasks can now link to any of the forms saved in this common storage area.

# Doc Storage/Collab: Accessing Documents via Wiki Structure vs Other Structure

*Each Confluence Page can be like a Sharepoint Folder—but with more context data.*

## Sharepoint Library



## Confluence Page



# Success Factors in Establishing Useful Wikis

## Knowledgeable administrators/toolsmiths

- Configure permissions
- Configure and support template creation/update
- Configure dashboard pages and create pages that pull from Jira and other wiki sources

## Explicit team policies/conventions need to be socialized and accepted

- What tags and labels mean
- When/how/who should update different types of information (e.g. who can “assign” a Jira task to someone besides themselves?)

# What kinds of things does a Jira Kanban Board Support?

# Typical Program Office Needs Supported by a Jira Task Board

## Tasks Roadmap

## Task Prioritization

## Task Planning

## Task Workflow Management

- Multiple ways to view/organize

## Task Reporting

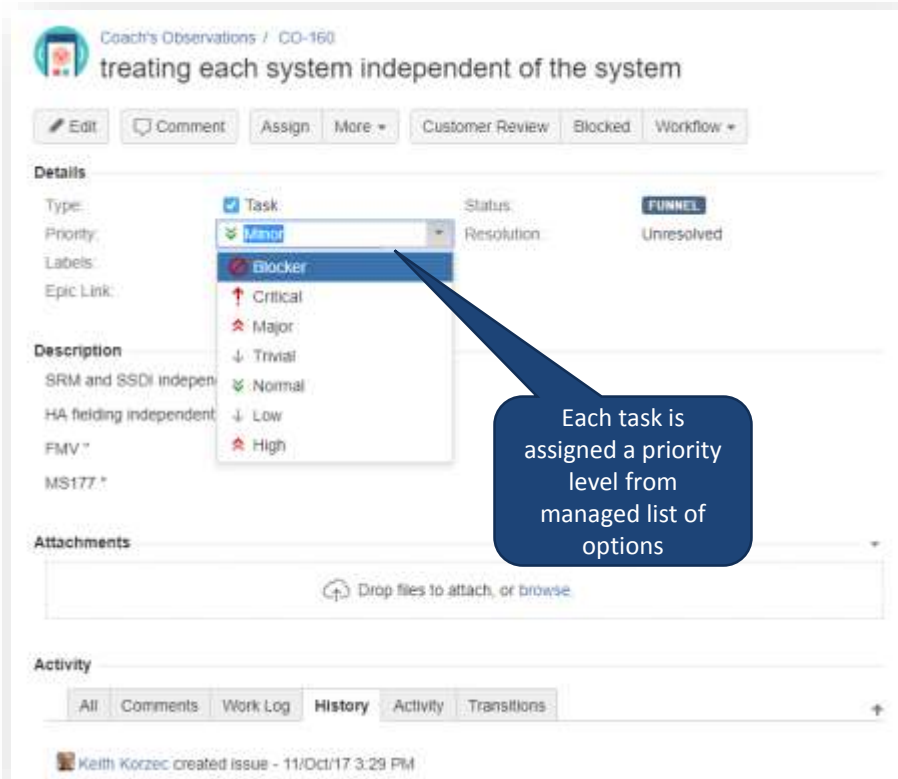
- Filters and Summaries within Jira
- Measurement Reports within Jira
- Exports to Wiki Reports
- Exports to Other Environments

## Team Collaboration

- Helping with Others' Tasks
- Commenting
- Reviewing



# Task Prioritization



Coach's Observations / CO-160

## treating each system independent of the system

Edit Comment Assign More Customer Review Blocked Workflow

**Details**

Type: Task  
Priority: Minor  
Labels: Blocker  
Epic Link:

**Description**

SRM and SSDi independent  
HA fielding independent  
FMV  
MS177

**Attachments**

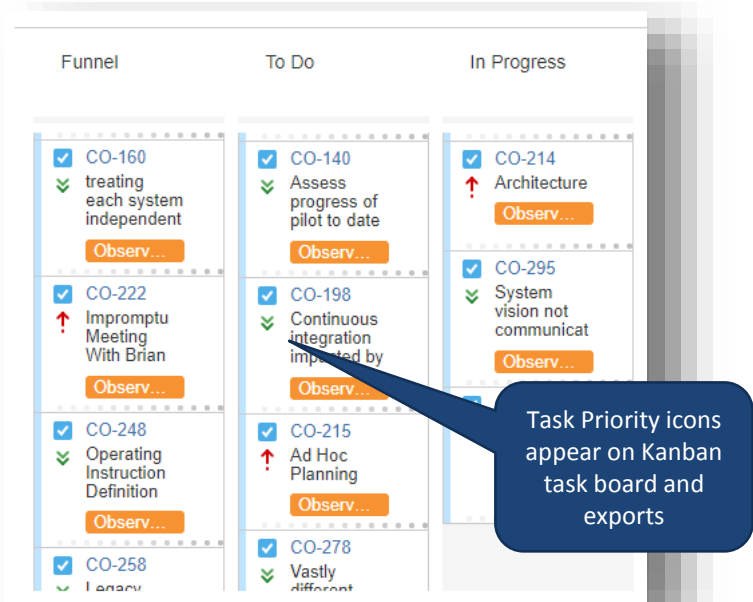
Drop files to attach, or browse

**Activity**

All Comments Work Log History Activity Transitions

Keith Korzec created issue - 11/Oct/17 3:29 PM

Each task is assigned a priority level from managed list of options



Funnel	To Do	In Progress
<ul style="list-style-type: none"><li>CO-160: treating each system independent (Minor priority icon)</li><li>CO-222: Impromptu Meeting With Brian (Minor priority icon)</li><li>CO-248: Operating Instruction Definition (Minor priority icon)</li><li>CO-258: Legacy (Minor priority icon)</li></ul>	<ul style="list-style-type: none"><li>CO-140: Assess progress of pilot to date (Minor priority icon)</li><li>CO-198: Continuous integration implemented by (Minor priority icon)</li><li>CO-215: Ad Hoc Planning (Minor priority icon)</li><li>CO-278: Vastly different (Minor priority icon)</li></ul>	<ul style="list-style-type: none"><li>CO-214: Architecture (Minor priority icon)</li><li>CO-295: System vision not communicated (Minor priority icon)</li></ul>

Task Priority icons appear on Kanban task board and exports

# Task Planning

The screenshot displays a Jira task interface for 'EVSM IV' (ID: CO-292). The task is currently in the 'In Progress' state. The interface includes sections for Details, Description, Attachments, and Activity. Callouts highlight specific features: the unique identifier 'CO-292', the task details (Type: Task, Priority: Minor, Labels: Implementations), the description of a 1-week meeting, the attachments (Marked up Waterfall Process, Problem Statement, Proposed Process), and the activity summary (comment by Charlie Ryan).

Unique identifier assigned to task

Capture important details about the task

Link to or attach resources associated with this task

Assign task to appropriate team member

Task activity summary, including comments and history

# Task Workflow Management

The screenshot displays a Jira Kanban board for the 'Design Team'. The board is organized into three columns: '35 of 562 To Do', '5 of 38 In Progress', and '4 of 5156 Done'. Each column contains task cards with details such as ID, description, priority, and assignee. A callout points to a task card in the 'To Do' column, indicating a link to full summary information. Another callout points to the 'In Progress' column, indicating where to view tasks in each stage of the workflow. A third callout points to a task card in the 'Done' column, highlighting color-coding and icons that provide a quick glimpse of task priority, owner, etc.

Design Team  
Kanban board

QUICK FILTERS: Only My Issues Recently Updated

35 of 562 To Do

5 of 38 In Progress

4 of 5156 Done

View Tasks in each stage of workflow

Link to full summary of task information

Color-coding and icons provide quick glimpse of task priority, owner, etc.

# Task Reporting

Create Issue

Project: Coacfr's Observations (CO)

Issue Type: Task

Epic Link: Choose an epic to assign this issue to

Summary\*

Description

Reporter: Crisanne Nolan

Assignee: Automatic

Program: None

Event Name Labels

Buttons: Create another, Create, Cancel

Some fields are required – denoted by red asterisk – and other fields are optional

Task data fields can be configured to meet project needs, depending on the type of Jira instance you are using

Drop-down response options ensure consistency where needed—especially useful for constructing reports

# Task Reporting—Filters and Summaries within Jira

Filter results by default filters or create your own

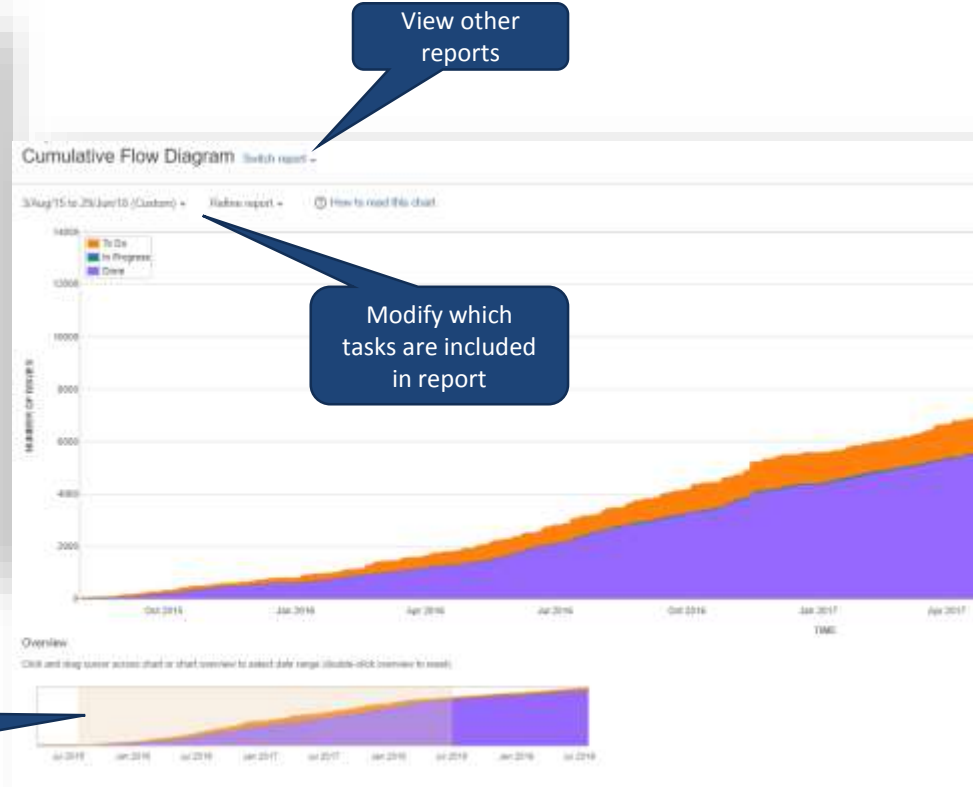
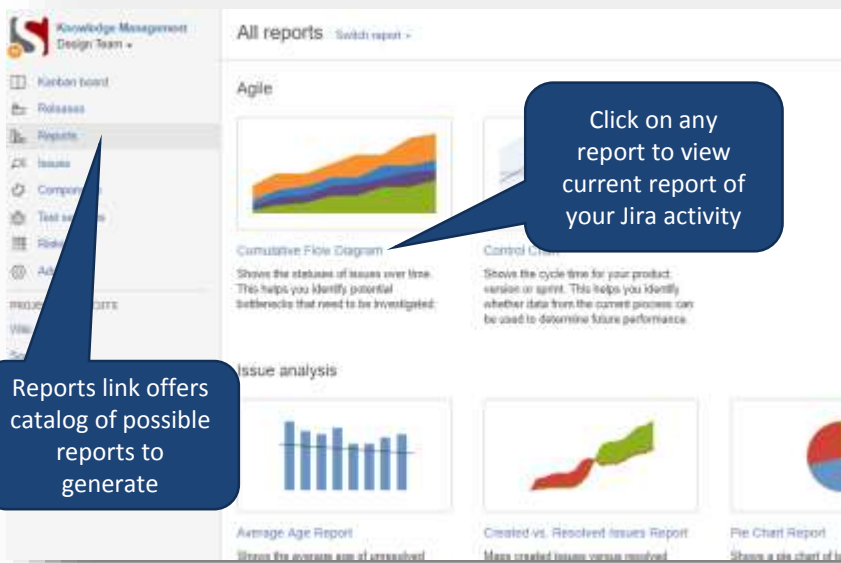
Save searches for future use

The screenshot shows the Jira Search interface. On the left, there is a sidebar with a 'FILTERS' section containing a 'New filter' button and a 'Find filters' search bar. Below this is a 'COLUMN TOTALS' section with a 'Calculate' button and a settings gear icon. The main area has a 'Search' header with a 'Save as' button. Below the header, there are filter criteria: 'Coach's Observations', 'Type: All', 'Status: All', 'Assignee: All', 'Contains text', 'More', and 'Advanced'. The results are displayed as a table with columns: 'Key', 'Summary', 'Assignee', 'Reporter', 'P', and 'Status'. The table shows 1-50 of 280 results. The first row is 'CO-2 Testing Concerns' by Bruce A Grant, reported by Peter S Capell, with a status of 'DONE'. The second row is 'CO-3 Issues with the JIRA site' by Keith Korzec, with a status of 'FUNNEL'. The third row is 'CO-4 Definition of Done and Acceptance Criteria not being met' by Bruce A Grant, with a status of 'QUARTERLY'. The fourth row is 'CO-5 Business Owners Options' by Keith Korzec, with a status of 'QUARTERLY'. The fifth row is 'CO-6 Decomposition of Epics, Capabilities, Features and User Stories' by Bruce A Grant, with a status of 'QUARTERLY'.

Key	Summary	Assignee	Reporter	P	Status
CO-2	Testing Concerns	Bruce A Grant	Peter S Capell	★	DONE
CO-3	Issues with the JIRA site	Keith Korzec	Keith Korzec	🚧	FUNNEL
CO-4	Definition of Done and Acceptance Criteria not being met	Bruce A Grant	Bruce A Grant	🚧	QUARTERLY
CO-5	Business Owners Options	Keith Korzec	Keith Korzec	🚧	QUARTERLY
CO-6	Decomposition of Epics, Capabilities, Features and User Stories	Bruce A Grant	Bruce A Grant	🚧	QUARTERLY

Click on link to view all of the task information

# Task Reporting: Measurement Reports within Jira



# Task Reporting: Exports to Wiki Reports

The screenshot shows a Wiki report page titled "Recognition Award Form". It includes a metadata section, a table of associated JIRA issues, and sections for goals and background. Two callouts highlight key features: one pointing to the metadata section stating "Wiki report page provides summary of information", and another pointing to the JIRA issues table stating "Task fields populated with information exported from Jira".

**Wiki report page provides summary of information**

**Task fields populated with information exported from Jira**

**Recognition Award Form**  
Created by Danielle L. Edwards; last modified by Stephen Patrick Cooney on Apr 26, 2017

Target release	April 2017
Document status	DRAFT
Document owner	@Danielle L. Edwards
Designer	@Stephen Patrick Cooney
Developers	@Stephen Patrick Cooney
QA	@Bernadette Ledwich @Alena Leybovich

**Associated JIRA Issues**

Key	Summary	Created	Updated	Due	Assignee	Reporter	P	Status	Resolution
MISG-104	Recognition Award Form Updates	Apr 03, 2017	May 30, 2017		Stephen Patrick Cooney	Danielle L. Edwards	W	CLOSED	Fixed
MISG-99	Recognition Award Form Revisions Meeting	Mar 17, 2017	May 10, 2017		Stephen Patrick Cooney	Bernadette Ledwich	W	CLOSED	Fixed

2 issues Refresh

**Goals**

- Modify the Recognition Award Form to include fields necessary to capture information related to the Activity Pay form and route e-mail to the appropriate parties.

**Background and strategic fit**

Merging two related forms (one electronic, the other PDF) in an unified form.

# Task Reporting: Exports to Other Environments

CISO Academy / CISOA-128

## Scenario Update

Comment Agile Board More

17 of 29

Export

XML  
Word  
Printable

People

Assignee: Larry Rogers

Reporter: Brittany Ann Manley

Votes: 0

Watchers: 1

Start watching this issue

Details

Type: Task

Status: BACKLOG

Priority: Minor

Resolution: Unresolved

Affects Version/s: None

Fix Version/s: 2.2 General Dev

Component/s: CISO Academy

Labels: None

Epic Link: Advanced Incident Handling

Description

In the Scenario – we need to mention the IC software in the main scenario too – it was hard for the folks to find. I'd also like us to say that there is an ISAC for our specific manufacturing sector and that we can add that in.

Dates

Created: 01/Jun/18 9:57 AM

Updated: 01/Jun/18 9:57 AM

Export report or single activity data into multiple formats

[CISOA-128] [Scenario Update](#) Created: 01/Jun/18 Updated: 01/Jun/18

Status:	Backlog
Project:	<a href="#">CISO Academy</a>
Component/s:	<a href="#">CISO Academy</a>
Affects Version/s:	None
Fix Version/s:	<a href="#">2.2 General Dev</a>

Export includes activity data

Type:	Task	Priority:	Minor
Reporter:	<a href="#">Brittany Ann Manley</a>	Assignee:	<a href="#">Larry Rogers</a>
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		

Epic Link: [Advanced Incident Handling](#)

Description

In the Scenario – we need to mention the IC software in the main scenario too – it was hard for the folks to find. I'd also like us to say that there is an ISAC for our specific manufacturing sector and that we can add that in.



# Team Collaboration

The screenshot displays the 'Accomplishments Management System / AMS-2251' interface. The main heading is 'Implement Recent Accomplishments portlet on "About Us" section of Division pages'. Below this, there are tabs for 'Comment', 'Agile Board', and 'More +'. The 'Details' section shows the task type as 'Task', priority as 'Critical', status as 'CLOSED', and resolution as 'Fixed'. The description mentions a CERT mockup and a link to the view page. The 'Activity' section shows a list of comments from Damon Morda, Annie Kim, and Jason D. Stankoski. The 'Time Tracking' section shows a bar chart for estimated, remaining, and logged time. The 'Agile' section shows the completed sprint 'KM Sprint 05 - Cosma'.

Team uses comments to request review and input

Users can opt in to watch for updates on important tasks others are working

New comments can be added at any time

# Team Collaboration: Helping with Others' Tasks

The screenshot displays a Jira issue titled "Unable to create a professional award accomplishment" (ID: AMS-2100). The issue is a "Bug" with "Critical" priority, status "CLOSED", and resolution "Fixed". It is assigned to Steve Scholnick. The "Description" field contains the text "Unable to create a professional award accomplishment". The "Activity" tab is selected, showing a history of comments and assignments. A callout points to the "History" tab, stating "Updates and Assignee changes are recorded in History tab". Another callout points to a comment by Steve Scholnick, stating "Task reassigned to different team member for help". A third callout points to a comment by Damon Morda, stating "New assignee assists then reassigns to original owner". The "People" section shows the assignee and reporter as Steve Scholnick. The "Dates" section shows the issue was created on 19/Sep/18 and resolved on 20/Sep/18. The "Time Tracking" section shows 1h of time logged. The "Agile" section shows the issue is part of the "KM Sprint 47 - UFO" which ended on 02/Oct/18.

Accomplishments Management System / AMS-2100  
202 of 2047

Comment Agile Board More

Export

**Details**

Type: Bug Status: CLOSED  
Priority: Critical Resolution: Fixed  
Affects Version/s: 2.2.0 Fix Version/s: 2.2.1  
Labels: None  
Sprint: KM Sprint 47 - UFO

**Description**  
Unable to create a professional award accomplishment

**Issue Links**  
mentioned in a Page No Confluence page found with the

**Activity**  
All Comments Work Log History Activity Transitions

Steve Scholnick added a comment - 28/Sep/18 1:54 PM  
Assigning to Damon Morda for verification.

Damon Morda added a comment - 02/Oct/18 8:42 AM  
Works for me in test.

**People**  
Assignee: Steve Scholnick  
Reporter: Steve Scholnick  
Votes: Vote for this issue  
Watchers: Start watching this issue

**Dates**  
Created: 19/Sep/18 9:05 PM  
Updated: 03/Oct/18 10:57 AM  
Resolved: 20/Sep/18 10:30 AM

**Time Tracking**  
Estimated: Not Specified  
Remaining: 0m  
Logged: 1h

**Agile**  
Completed Sprint: KM Sprint 47 - UFO ended 02/Oct/18  
View on Board

Current task owner displayed here

Updates and Assignee changes are recorded in History tab

Task reassigned to different team member for help

New assignee assists then reassigns to original owner

# Team Collaboration: Commenting

Accomplishments Management System / AMS-2251

## Implement Recent Accomplishments portlet on "About Us" section of Division pages

Comment | Agile Board | More +

Export +

**Details**

Type	Task	Status	CLOSED
Priority	Critical	Resolution	Fixed
Affects Version/s	None	Fix Version/s	2.6.0
Labels	None		
Epic Link	AMS to AI		
Sprint	KM Sprint 05 - Cosmo		

**Description**

Refer to the CERT mockup on this page

- Accomplishment title should take them to the view page for the accomplishment
- People's names should be just the Major Contributors and follow the following syntax:
  - Damon Morda

**Activity**

All | Comments | Work Log | History | Activity | Transitions

Damon Morda added a comment - 09/Apr/19 7:19 AM  
Annie Kim - Could you look at what I wrote for a description and add/change based on how you want it to look.

Annie Kim added a comment - 09/Apr/19 8:56 AM  
Description is good to go. Let me know if you run into any hiccups.

Jason D Stankoski added a comment - 22/Apr/19 12:42 PM  
Available in QA

Comment

**People**

Assignee: Steve Scholnick  
Reporter: Damon Morda  
Votes: Vote for this issue  
Watchers: Start watching this issue

**Dates**

Created: 07/Mar/19 9:00 AM  
Updated: 23/Apr/19 10:21 AM  
Resolved: 22/Apr/19 12:42 PM

**Time Tracking**

Estimated: 5h  
Remaining: 44m  
Logged: 4h 15m

**Agile**

Completed Sprint: KM-Sprint 05 - Cosmo ended 06/May/19  
View on Board

Leverage comments and notifications to provide feedback and iterate quickly

Users can opt in to notifications when changes and comments are added to the task

New comments can be added at any time

# Team Collaboration: Task Relationships

The screenshot shows a Jira task page for 'Review archetypes feedback and incorporate into News & Events slide deck' (KM-4560). The task is in a 'RESOLVED' status. The 'Details' section shows the task type as 'Task', priority as 'Minor', and it is linked to 'None' for Affects Version/s, Component/s, Labels, Epic Link, Sprint, and Acceptance Criteria. The 'Issue Links' section shows that this task is 'required by' 'KM-4452 Develop a draft slide deck that pitches the News & Events capability' and is 'mentioned in' 'Sprint 59: Pre-Planning Notes'. The 'Activity' section shows a comment from Barbora Batokova added yesterday. Three callouts explain task relationships: 'Tasks can linked to other tasks. Links reflect relationships including required, related to, and blocks.', 'Completion of this task is required to complete another task', and 'This task is included in a sprint.'

Knowledge Management / KM-4560  
Review archetypes feedback and incorporate into News & Events slide deck

Comment Agile Board More ▾

**Details**

Type: Task  
Priority: Minor  
Affects Version/s: None  
Component/s: None  
Labels: None  
Epic Link: None  
Sprint: None  
Acceptance Criteria: None

Status: **RESOLVED**  
Resolution: Done  
Fix Version/s: None

Hide Checked

**Issue Links**

is required by: KM-4452 Develop a draft slide deck that pitches the News & Events capability  
mentioned in: Sprint 59: Pre-Planning Notes

**Activity**

All Comments Activity Transitions

Barbora Batokova added a comment - Yesterday

Tasks can linked to other tasks. Links reflect relationships including required, related to, and blocks.

Completion of this task is required to complete another task

This task is included in a sprint.

# Constraints for Using Confluence Wiki or Jira

If you can't establish an environment where all stakeholders who would use the wiki/Jira are allowed, you will have to do a fair bit of export to allow them to engage.

- E.g. non-US Persons are not allowed on DI2E wiki/Jira spaces, a frequent place program offices start their wiki/Jira spaces

If you can't establish an environment that meets the classification needs of your project, you may not be able to have \*all\* your data in one place

- Most projects find that the Jira tasks can be kept at an unclassified level
- Classified content is segregated from task content

Understand the number of stakeholders that will regularly use the system to make sure you scale your installation appropriately

- Government networks are often already slow – an overburdened Jira instance that is slow won't be tolerated well by new users

# When to Consider \*NOT\* Using Wiki/Jira

When you do \*NOT\* need tasks of at least 4 hours in effort to be

- Identified
- Prioritized
- Assigned
- Tracked
- Reviewed
- Completed
- Reported on

(e.g. small tasks like “complete expense report”)

# Summary

Organizations trying to implement Agile/Lean principles quickly figure out that automating workflow and using online systems to provide transparency are high leverage

Even organizations not pursuing Agile/Lean often find that the capabilities provided by Wikis and Jira or similar workflow management systems help them to manage projects more effectively