



Leveraging Wikis and Jira for Program Office Types of Work

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DM21-0131

Agenda

Confluence & Jira – What Goes Where?

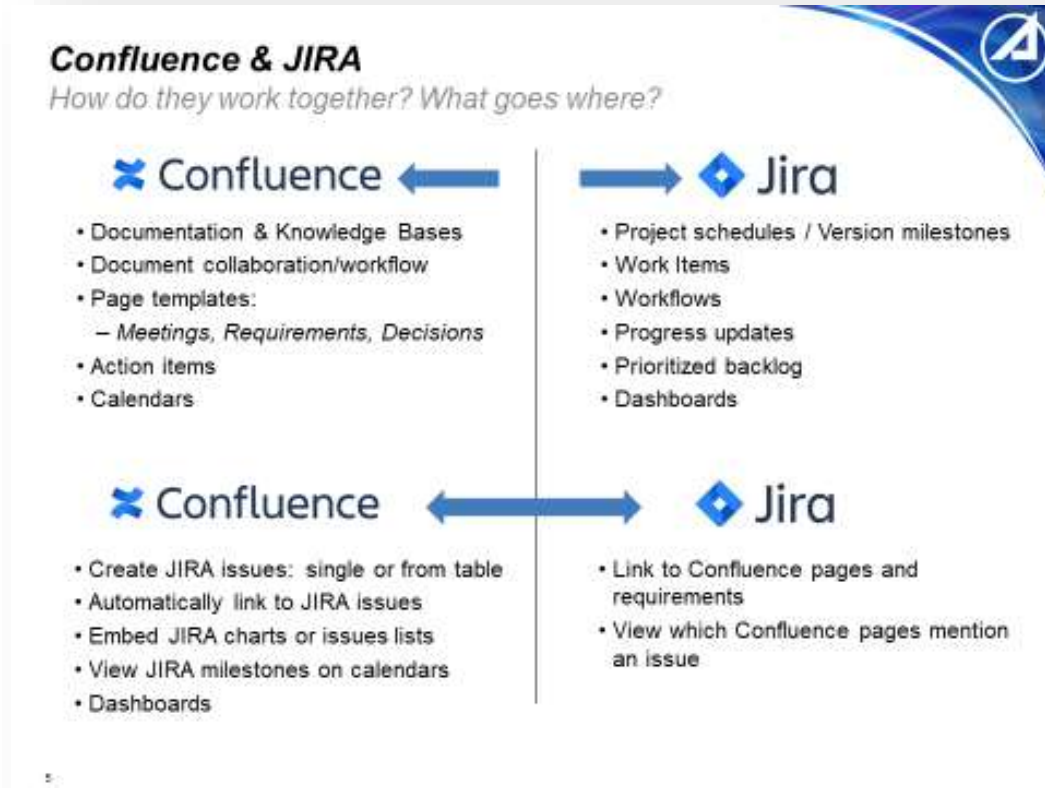
What kinds of things does a Confluence Wiki support?

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

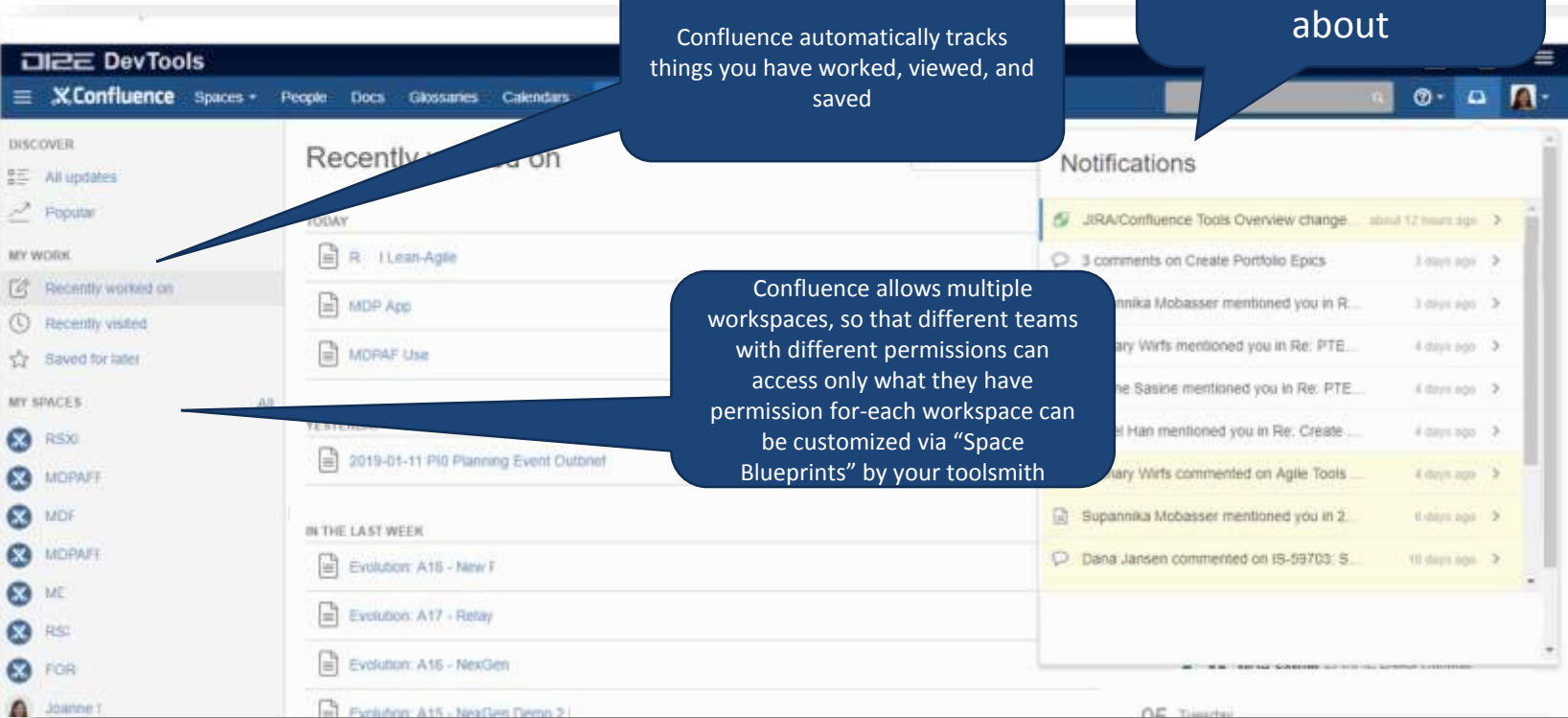
Gimmees (things Wikis enable really well)

- 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



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

Pull notifications about Tasks and wiki pages you care about

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 McCaughrin (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 if you have something you think was here that you can no longer find.

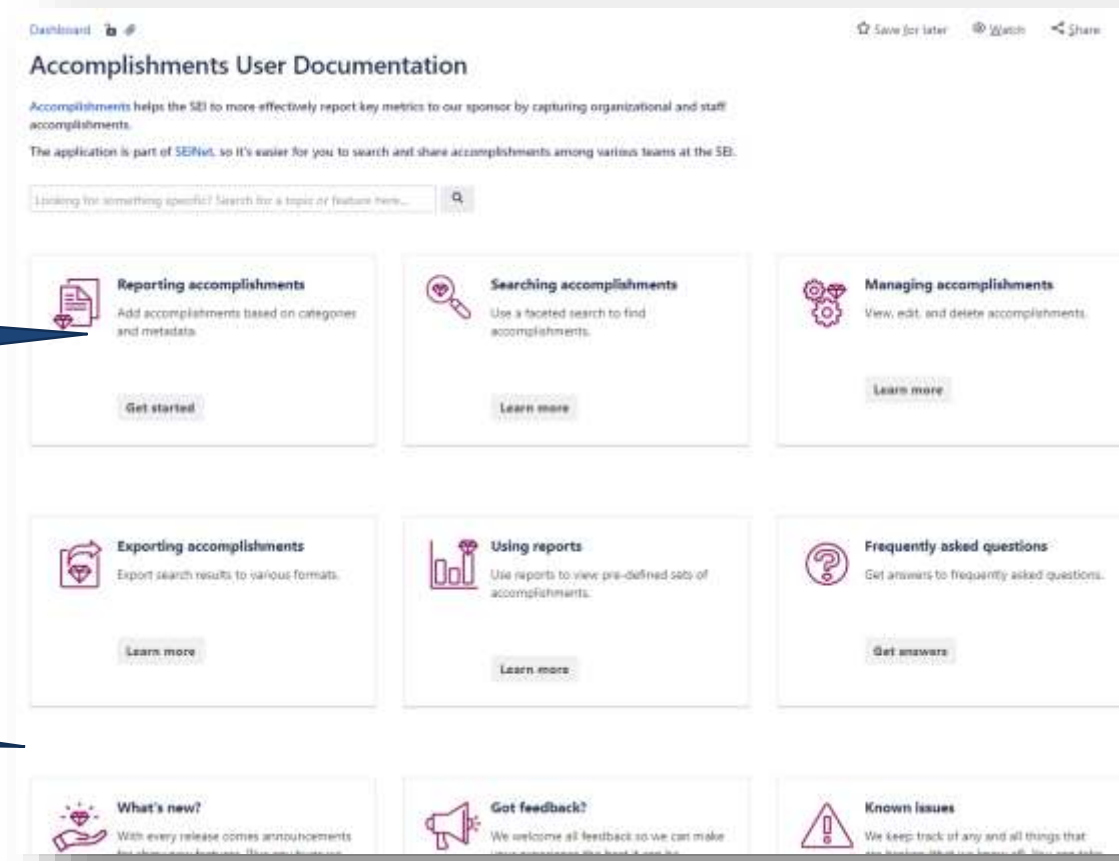
One thing that has changed in how we use this site – for C... Development, we mostly are using a SharePoint site...

For courses that we give frequently (e.g. AIG), we use production instructions to provide a spot for admin... the files and process them for production. So cour... work" won't show up in the wiki until it's in produc...

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



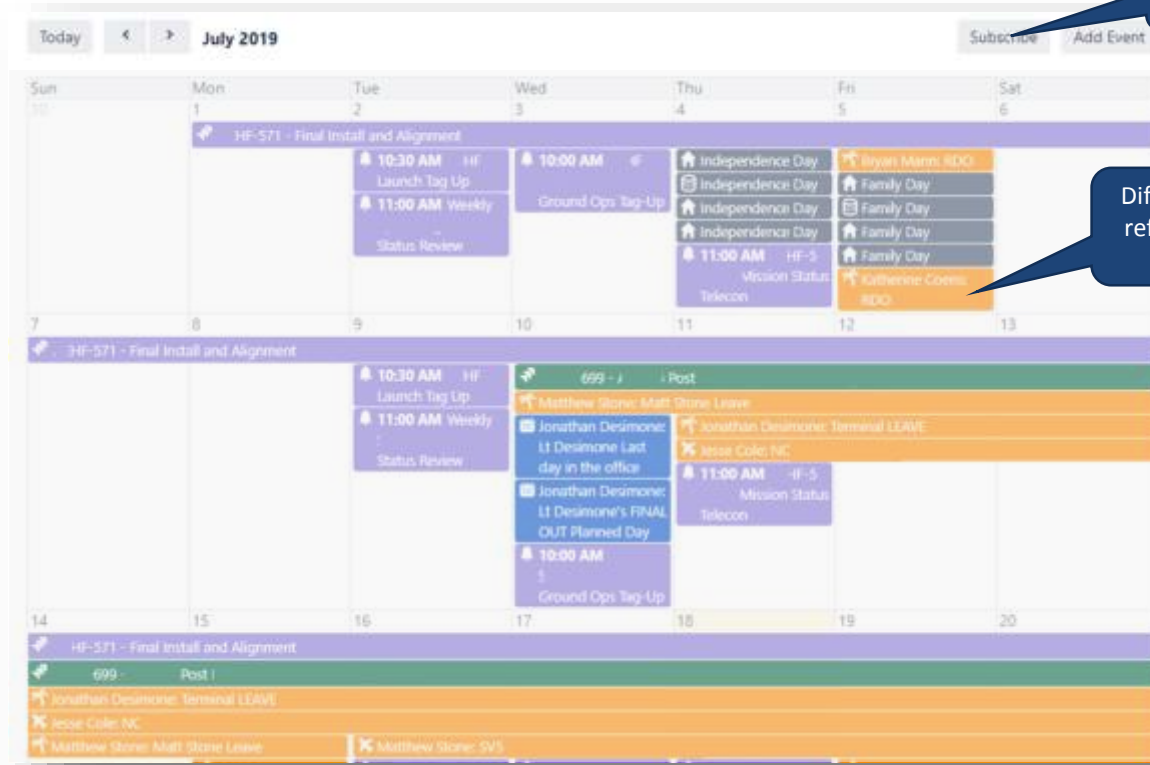
An annotated Table of Contents that takes users directly to that section without having to look through the tree structure on the navigation pane

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

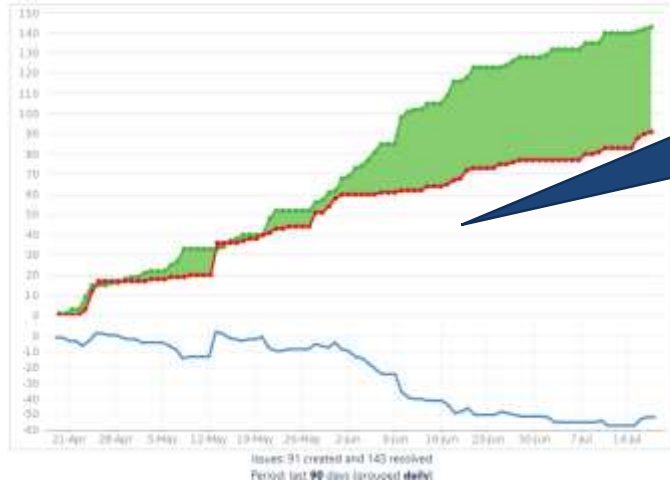
To view content, you must have the right JIRA permissions, not just the wiki page permission

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

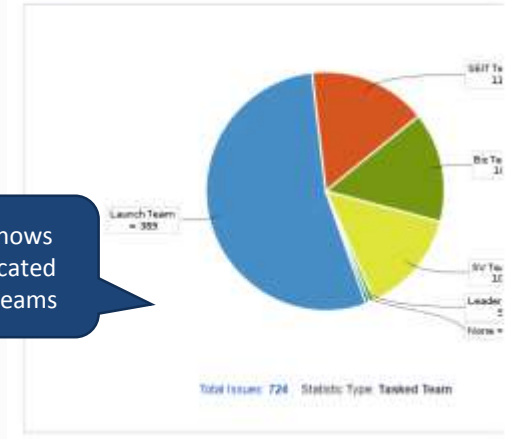
The top half of the chart shows how many issues have been resolved vs created in the last 90 days across all teams. Green is resolved issues, red is new issues. The bottom half is the average rate at which issues are being either created (positive number) or resolved (negative number). If the red line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



Created vs Resolved helps management see the inflow of tasks to the group and the pace at which tasks are completed.

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.



Tasks by team shows how work is allocated across multiple teams

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 Sta
	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 Sustainment	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.

Team can individually edit page to enter activity into report.

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

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 Getts to see about getting access to his AEHF and ARC projects on DIZE-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 tongle		Suzanne M Miller	2018-05-04 Meeting notes
<input type="checkbox"/> sdfsdfsdf @ 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 D

Branch PMR Report

Created by Jason Ellis last modified by Elizabeth Fortson on Mar 08, 2019

Material Leader | Integrated Master Schedule (IMS) | SV Production Team | cSEIT | Bis Ops Team | **Launch Team** | iSEIT 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 - MLBER(s)	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 Exercise 2	May 22, 2019	
DHF S - MAb	May	
DHF S - Broads	Jun 05, 2019	Jun 13, 2019
DHF S - Readiness Review	Jun 13, 2019	Jun 13, 2019
DHF S - Integration Facility		Jun 14, 2019
DHF S - iDress Referral		Jun 20, 2019
DHF S - Executive Review		Jun 21, 2019
DHF S - Readiness Review		Aug 05, 2019
DHF S - ULA Review		Aug 05, 2019
DHF S - Initial Capability		Aug 08, 2019

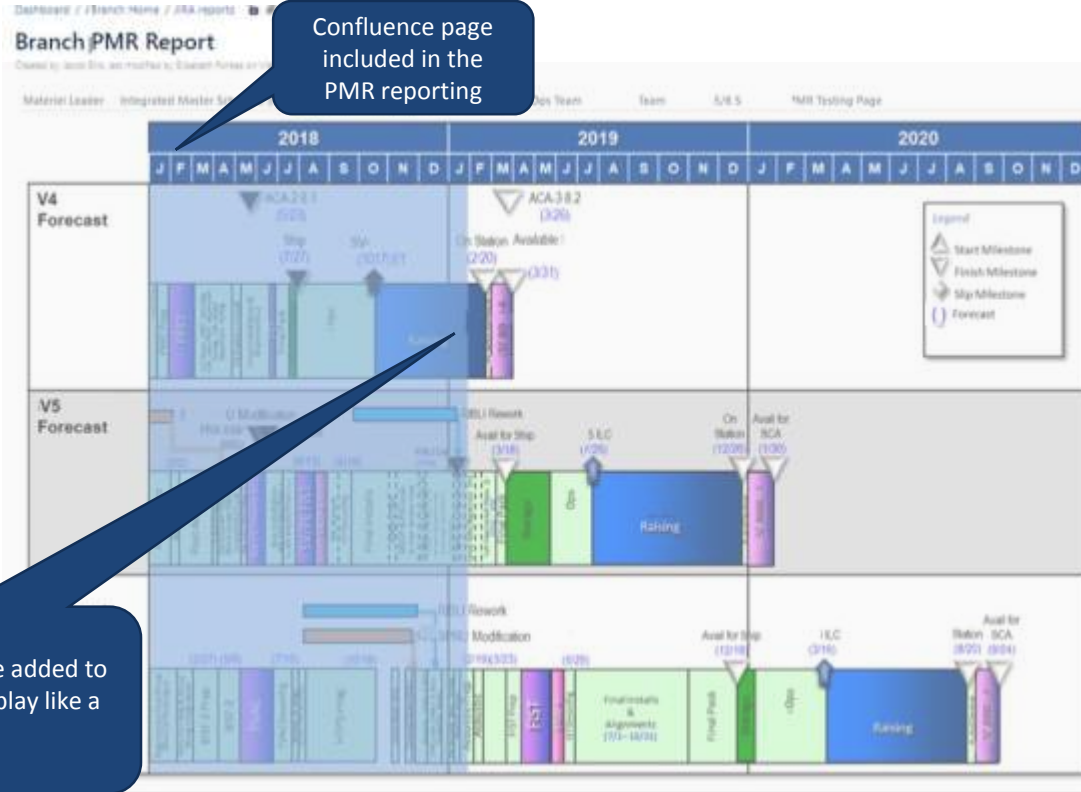
16 issues Refresh

Tabs are links to other wiki pages with PMR report elements

Automated data gathered in report from Jira activity

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	Jun '19 Budget vs Planned.xlsx	FY19 Monthly Financials - Jun19 2nd Close.xlsx	June FY19 Actuals Monthly 2nd Close.xlsx	Jun19
May '19	May '19 Budget vs Planned.xlsx	FY19 Monthly Financials - May19.xlsx	May FY19 Actuals Monthly.xlsx	May19

Summary of reports and links to documents built into Confluence dashboard

Dashboard updated at specified frequency

Management Dashboards: Pulled from Jira Task Boards

The screenshot shows a Jira dashboard with several sections:

- Sprint Dates:** 13 Mar 2019 - 03 Apr 2019
- Sprint Goal:** Complete development on all functionality needed for SEI-wide release of Accomplishments and "gray background", multi-day availability and hover card ready for release, and have archetypes survey ready for launch.
- User Stories:** A table listing user stories with keys, summaries, and status.
- Sprint Summary:** A line chart showing progress over time with callouts.

Callouts provide context:

- "Sprint dashboard reflects current activity in Jira." (points to the Sprint Summary chart)
- "Jira task data and status are reflected in the wiki dashboard." (points to the User Stories table)
- "Link to Jira interface for more information about user story" (points to a link in the User Stories table)

Key	Summary	Status
KM-4012	As a product owner, I'd like a survey that will help me identify various archetypes.	CLOSED
KM-4156	How many views a page has and how to increase its popularity	OPEN
AMS-2252	...	CLOSED

Sprint Summary Chart Data (Approximate):

Date	Actual Progress (Red)	Forecast (Grey)
Mar 15	2000	2000
Mar 17	1800	1600
Mar 19	1600	1200
Mar 21	1400	900
Mar 23	1200	600
Mar 25	1000	300
Mar 27	800	0
Mar 29	600	-
Mar 31	400	-
Apr 2	200	-

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

Decision	Status	Stakeholders	Outcome	Due date	Owner
PCS Form Statuses	IN PROGRESS	@ Bernadette Ledwich @ Michael A Wright @ Debbie Spear			@ Danielle L Edwards
System/Role Terminology	DECIDED	@ Bernadette Ledwich @ Michael A Wright @ Debbie Spear	See roles specified below.		@ Danielle L Edwards
PCS Statuses	DECIDED	@ Bernadette Ledwich @ Michael A Wright @ Debbie Spear	Will use the statuses below.		@ Danielle L Edwards
PCS Numbering	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

Link to view wiki page about decision

Button to add new decision wiki page using template

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

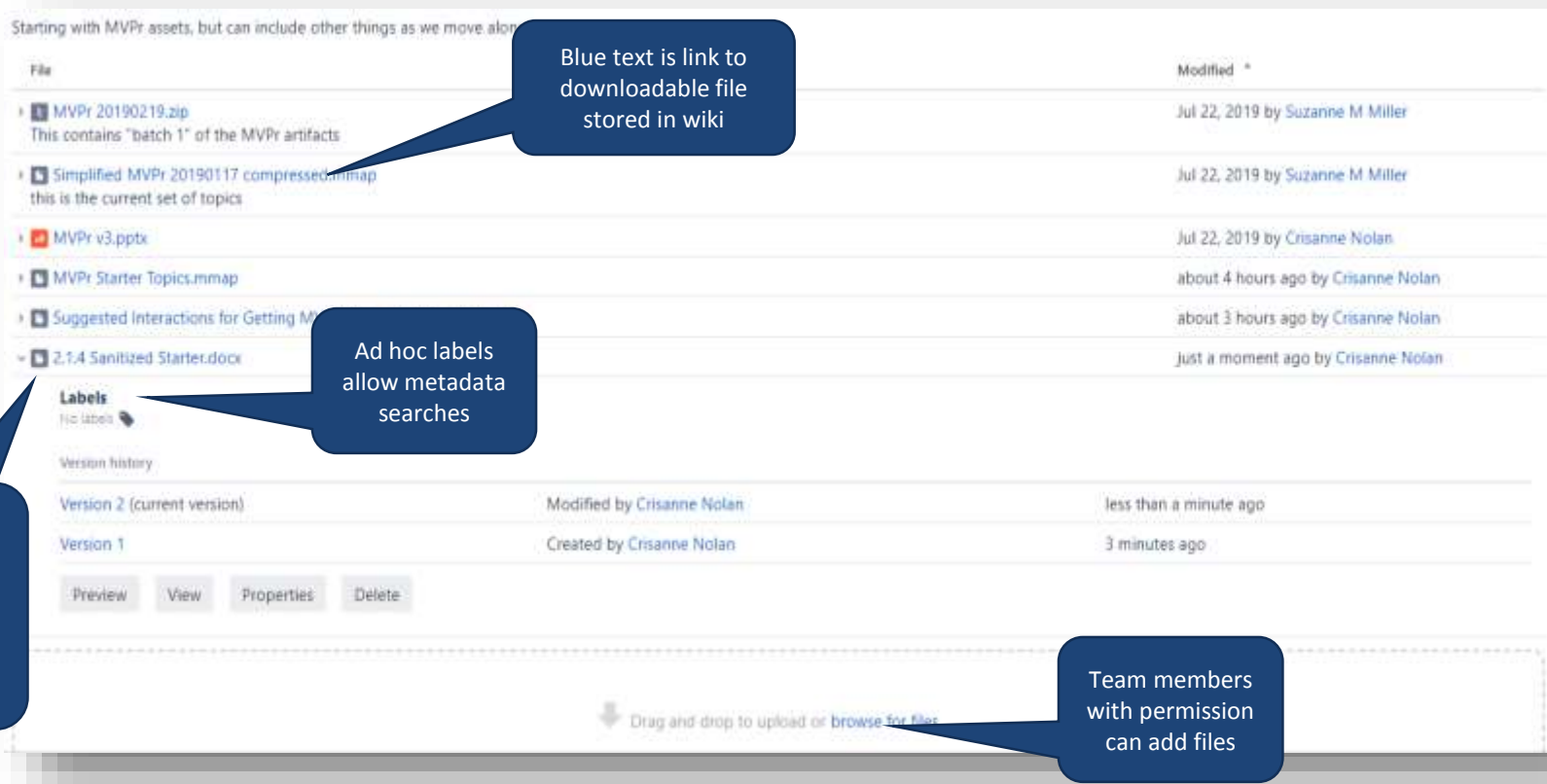
Labels
No labels

Version history

Version	Modified by	Modified
Version 2 (current version)	Crisanne Nolan	less than a minute ago
Version 1	Crisanne Nolan	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

3DEI (Team: @Suzanne M Miller)

- Working with Colleen on training needs

Any team member can edit content of page.

Document can be modified and shared by team members.

Page History

Compare selected versions

Version	Published	Changed By	Actions
CURRENT (v. 11)	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

Possible to restore an earlier version of the page

Tagging other users supports search and notifications

Links to view a previous version of the edited 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.

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 page for 'Knowledge Management / KMA-2622'. The issue title is 'Create a Confluence template for InfoByte scripts'. The issue is in the 'CLOSED' status. The details section shows: Type: Task, Priority: Minor, Affects Version/s: None, Component/s: Documentation - All, Labels: None, Sprint: KMA Sprint 36 - Lucky Bucket. The issue links section shows a link to the Wiki Page: 'Scripts - SEI InfoBytes'.

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

Issue Links







Link Type	Link
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
>  Authorization for Employee Expense.pdf	Feb 14, 2019 by Cait Batchelor
>  Checklist - Invoicing and Accounts Receivable	Jan 03, 2019 by Cait Batchelor
>  Taxable Reimbursement Form.pdf	Jan 03, 2019 by Cait Batchelor
>  Communication Allowance Form.pdf	Jan 09, 2019 by Cait Batchelor
>  Effort Project Budget Template.xls	Jan 03, 2019 by Cait Batchelor
>  Express Shipping Request Form.doc	Jan 03, 2019 by Cait Batchelor

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

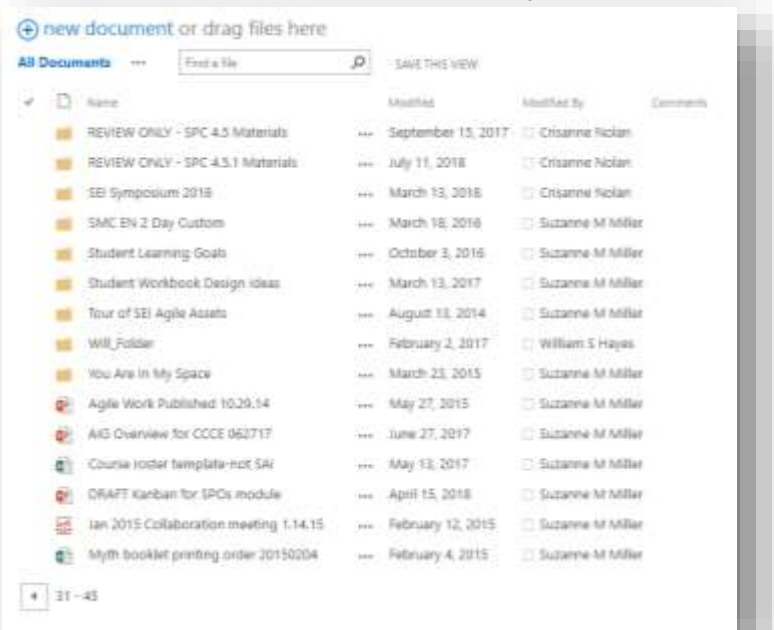
Provides version control

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



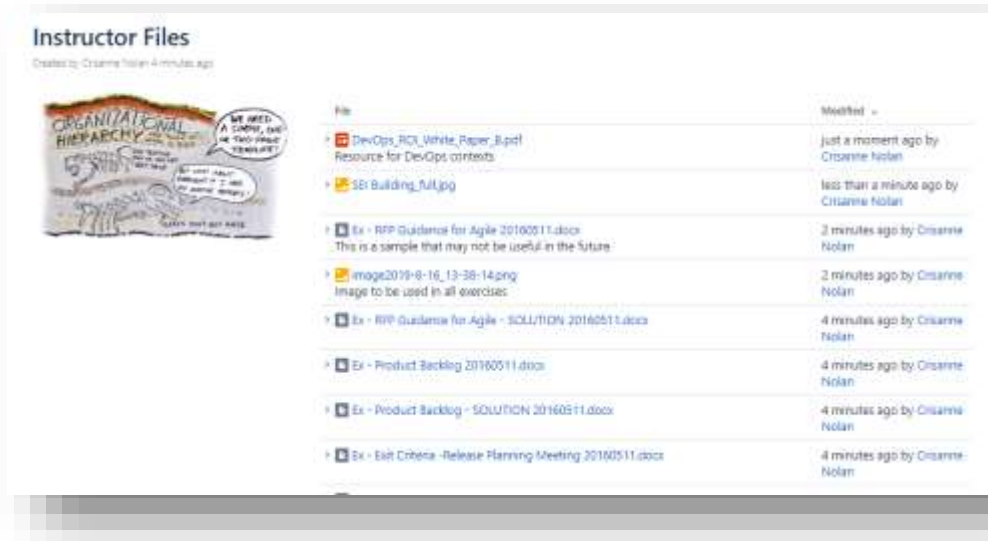
new document or drag files here

All Documents Find a file SAVE THIS VIEW


Name	Modified	Modified By	Comments
REVIEW ONLY - SPC 4.5 Materials	September 15, 2017	Crisanne Nolan	
REVIEW ONLY - SPC 4.5.1 Materials	July 11, 2018	Crisanne Nolan	
SEI Symposium 2018	March 13, 2018	Crisanne Nolan	
SMC EN 2 Day Custom	March 18, 2016	Suzanne M Miller	
Student Learning Goals	October 3, 2016	Suzanne M Miller	
Student Workbook Design ideas	March 13, 2017	Suzanne M Miller	
Tour of SEI Agile Assets	August 13, 2014	Suzanne M Miller	
Will Folder	February 2, 2017	William S Hayes	
You Are In My Space	March 23, 2015	Suzanne M Miller	
Agile Work Published 10.29.14	May 27, 2015	Suzanne M Miller	
AG Overview for COCE 062717	June 27, 2017	Suzanne M Miller	
Course Model template-not SAR	May 13, 2017	Suzanne M Miller	
DRAFT Kanban for SPOs module	April 15, 2018	Suzanne M Miller	
Jan 2015 Collaboration meeting 1.14.15	February 12, 2015	Suzanne M Miller	
Myth booklet printing order 20150204	February 4, 2015	Suzanne M Miller	

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Confluence Page



Instructor Files
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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 Status: **FUNNEL**
Priority: **Minor** Resolution: Unresolved
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

Priority Options:

- Minor
- Blocker
- Critical
- Major
- Trivial
- Normal
- Low
- High

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

Funnel	To Do	In Progress
<input checked="" type="checkbox"/> CO-160 treating each system independent Observ...	<input checked="" type="checkbox"/> CO-140 Assess progress of pilot to date Observ...	<input checked="" type="checkbox"/> CO-214 Architecture Observ...
<input checked="" type="checkbox"/> CO-222 Impromptu Meeting With Brian Observ...	<input checked="" type="checkbox"/> CO-198 Continuous integration implemented by Observ...	<input checked="" type="checkbox"/> CO-295 System vision not communicated Observ...
<input checked="" type="checkbox"/> CO-248 Operating Instruction Definition Observ...	<input checked="" type="checkbox"/> CO-215 Ad Hoc Planning Observ...	
<input checked="" type="checkbox"/> CO-258 Legacy	<input checked="" type="checkbox"/> CO-278 Vastly different	

Task Priority icons appear on Kanban task board and exports

Task Planning

The screenshot shows a Jira task page for 'EVSM IV' with the following details:

- Unique identifier assigned to task:** CO-292
- Type:** Task
- Priority:** Minor
- Status:** In Progress
- Resolution:** Unresolved
- Labels:** None
- Category:** Implementation
- Description:** This was a 1 week meeting to generate the information necessary for XR's process improvement team
- Attachments:** Marked up Waterfall Process (3.62 MB), Problem Statement.jpg (7.85 MB), Proposed Process.jpg (8.14 MB)
- Activity Summary:** Charlie Ryan added a comment - 05/Jun/19 3:07 PM. Charlie attended Agile Collaboration Team bi-weekly meeting today. Rough notes uploaded below. Also PPT file uploaded below - this was the product of the week long event that Pat attended.

Capture important details about the task

Link to or attach resources associated with this task

Unique identifier assigned to task

Assign task to appropriate team member

Task activity summary, including comments and history

Task Workflow Management

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

The screenshot shows the 'Create Issue' form in Jira. The 'Project' is set to 'Coach's Observations (CO)' and the 'Issue Type' is 'Task'. The 'Epic Link' field is empty. The 'Summary' and 'Description' fields are present, with the 'Description' field having a rich text editor toolbar. The 'Reporter' is 'Crisanne Nolan' and the 'Assignee' is 'Automatic'. The 'Program' field is set to 'None'. The 'Event Name Labels' field is empty. A 'Configure Fields' button is located in the top right corner of the form.

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 displays the Jira search interface. On the left, there is a sidebar with 'FILTERS' and 'COLUMN TOTALS' sections. The main area shows a search bar with 'Coach's Observations' selected, and various filters for Type, Status, Assignee, and text content. Below the search bar, there is a table of results with columns for Key, Summary, Assignee, Reporter, and Status. The table shows five tasks, each with a checkbox in the first column and a status indicator in the last column.

	Key	Summary	Assignee	Reporter	Status
<input checked="" type="checkbox"/>	CO-2	Testing Concerns	Bruce A Grant	Peter S Capell	DONE
<input checked="" type="checkbox"/>	CO-3	Issues with the JIRA site	Keith Korzec	Keith Korzec	FUNNEL
<input checked="" type="checkbox"/>	CO-4	Definition of Done and Acceptance Criteria not being met	Bruce A Grant	Bruce A Grant	QUARTERLY
<input checked="" type="checkbox"/>	CO-5	Business Owners Options	Keith Korzec	Keith Korzec	QUARTERLY
<input checked="" type="checkbox"/>	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

The screenshot shows the Jira Reports interface. On the left is a navigation sidebar with options like 'Kanban board', 'Releases', 'Reports', 'Issues', 'Components', 'Test suites', 'Roles', and 'Aut'. The main area is titled 'All reports' and features a 'Switch report' dropdown. Under the 'Agile' section, there are three report cards: 'Cumulative Flow Diagram', 'Control Chart', and 'Issue analysis'. Below these are three more report cards: 'Average Age Report', 'Created vs. Resolved Issues Report', and 'Pie Chart Report'. A blue callout bubble points to the 'Reports' link in the sidebar, and another points to the 'Cumulative Flow Diagram' card.

Reports link offers catalog of possible reports to generate

Click on any report to view current report of your Jira activity

The screenshot shows the 'Cumulative Flow Diagram' report. At the top, it says 'Cumulative Flow Diagram' with a 'Switch report' dropdown. Below that, it shows a date range '3/Aug/15 to 26/Jun/16 (Custom)' and a 'Refresh report' button. A legend indicates three categories: 'To Do' (orange), 'In Progress' (blue), and 'Done' (purple). The main chart is a stacked area chart showing the number of issues over time from Oct 2015 to Apr 2017. The y-axis is labeled 'NUMBER OF ISSUES' and ranges from 0 to 14000. A blue callout bubble points to the legend, and another points to the 'Refresh report' button. Below the main chart is an 'Overview' section with a smaller version of the chart and a note: 'Click and drag across report or chart overview to select date range (double-click overview to reset)'. A blue callout bubble points to the 'Overview' section.

View other reports

Modify which tasks are included in report

Modify report by selecting timeframe

Task Reporting: Exports to Wiki Reports

The screenshot shows a Wiki report page for a project named 'Recognition Award Form'. The page includes a metadata table, a table of associated JIRA issues, and sections for goals and background. Two callouts highlight specific features: one pointing to the metadata table and another pointing to the JIRA issues table.

Wiki report page provides summary of information

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

Task fields populated with information exported from Jira

Key	Summary	Created	Updated	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

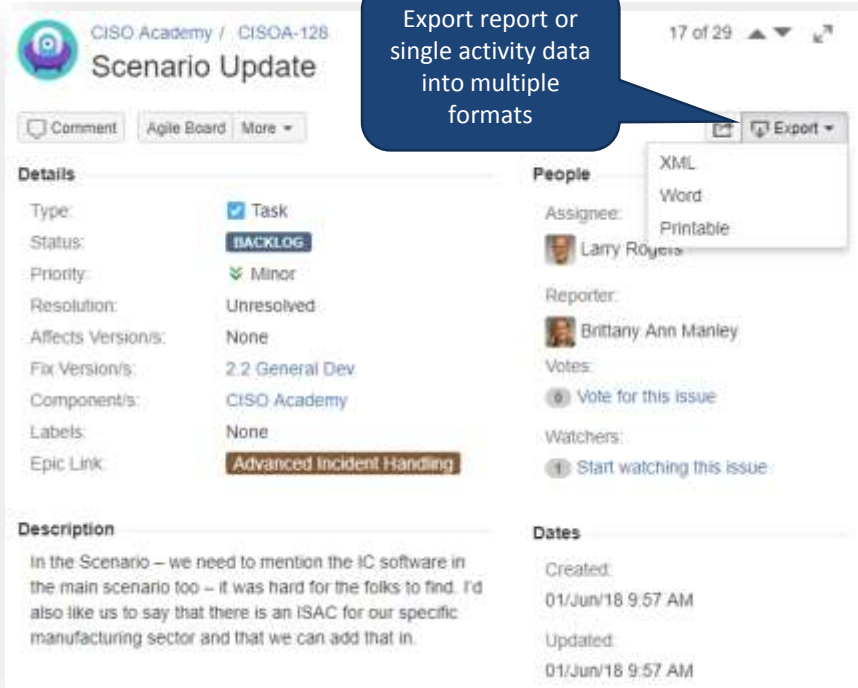
Goals

- 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: Vote for this issue

Watchers: Start watching this issue

Dates

Created: 01/Jun/18 9:57 AM

Updated: 01/Jun/18 9:57 AM

Details

Type: Task

Status: **BACKLOG**

Priority: Minor

Resolution: Unresolved

Affects Version/s: None

Fix Version/s: 2.2 General Dev

Component/s: CISO Academy

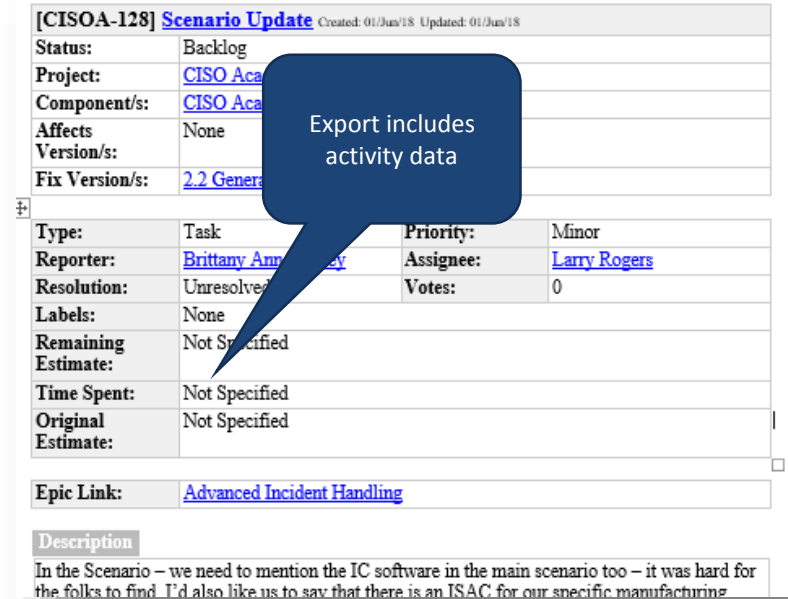
Labels: None

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.

Export report or single activity data into multiple formats



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

Status: Backlog

Project: [CISO Academy](#)

Component/s: [CISO Academy](#)

Affects Version/s: None

Fix Version/s: [2.2 General Dev](#)

Type:	Task	Priority:	Minor
Reporter:	Brittany Ann Manley	Assignee:	Larry Rogers
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

Export includes activity data

Team Collaboration

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	2.5.0
Labels	None		
Epic Link	AMS to All		
Sprint	KM Sprint 05 - Cooms		

Description

Refer to the CERT mockup on this page

- Accomplishment life 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 Km - Could you look at what I wrote for a description and add/change based on how you want it to look.
- Annie Km 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

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 shows a Jira issue page for 'Unable to create a professional award accomplishment' in the 'Accomplishments Management System / AMS-2100' project. The issue is a 'Bug' with 'Critical' priority and 'CLOSED' status. The 'Activity' tab is selected, showing a history of comments and assignments. Callouts highlight key collaboration features: a task reassignment to Damon Morda for help, updates and assignee changes recorded in the History tab, and a new assignee assisting and then reassigning the task back to the original owner, Steve Scholnick.

Task reassigned to different team member for help

Updates and Assignee changes are recorded in History tab

New assignee assists then reassigns to original owner

Current task owner displayed here

Team Collaboration: Commenting

Accomplishments Management System / AMS-2251
Implement Recent Accomplishments portlet on "About Us" section of Division pages

Comment | Agile Board | More +

Details

Type	Task	Status	Closed
Priority	Critical	Resolution	Fixed
Affects Version/s	None	Fix Version/s	2.5.0
Labels	None		
Epic Link	AMS to All		
Sprint	KM Sprint 05 - Coors		

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

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- 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 - Coors 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' (ID: KM-4560). The task is marked as 'RESOLVED'. The 'Details' section shows the task type is 'Task', priority is 'Minor', and status is 'RESOLVED'. 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.

Callout 1: Tasks can be linked to other tasks. Links reflect relationships including required, related to, and blocks.

Callout 2: Completion of this task is required to complete another task

Callout 3: 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