UC San Diego
Presentations and Posters

Title
DLF Project Managers Group - Project Portfolio Management Demo

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Hello! Intro. Recording this demo to share with the group.

My role: provide project portfolio management for digital projects (digitization, born digital, DH), Monitor project status and identify issues, includes lots of coordination, problem-solving/troubleshooting

Discuss project portfolio management and demo how digital projects are being tracked by the UC San Diego Library's Digital Library Development Program using Confluence and JIRA
Cover some of the goals and challenges of portfolio management
Plan for questions and discussion at the end

Overview

Project Portfolio Management = managing a group of projects
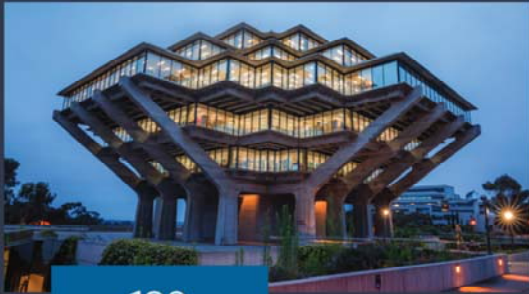
Goals:

- Prioritization
- Allocation of resources
- Resolving issues/change management
- Reporting out

Simple definition and overarching goals

Demo-ing tool-specific way of doing project portfolio management, but hope it provides ideas for any tool (possible to do some of this in Excel/Word, or Google Docs/Spreadsheet/Drive)

UCSD = Large Academic Library serving ~38,000 students, public research institute 100+ research centers, hospitals

We have a distributed, team approach to build digital collections between various programs in our Library, such as digital library development, research data curation, special collections and archives, metadata services, and information technology.

Digital Library Development Program established on the concept of coordinating the skills, knowledge and experience of staff distributed in various areas of the library to build digital collections, access systems and tools

We utilize Confluence and JIRA for project management, issue tracking, sharing and organizing information, as well as fostering collaboration.
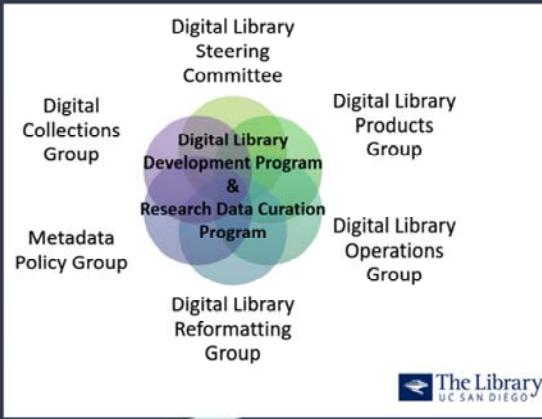
Presented at DLF on using Confluence/JIRA for project management in the past; over 10 years developing what we have today. And it takes many hands!

Committee Structure - Formed committees to address different aspects of digital initiatives:
• The Digital Library Steering Committee provides strategic oversight for the building, maintenance, long-term sustainability, and promotion of the Library's digital collections. (Membership: AULs & Directors of Programs, monthly meetings)
• The Digital Collections Group recommends and advises the Digital Library Steering Committee on priorities for local digitization projects and born digital content. The group considers, reviews, and prioritizes digital projects and advises on funding strategies. (Collection Curators, quarterly meetings)
• The Digital Library Products Group (DLPG) is responsible for the review and prioritization of work associated with utilities supporting Library Digital Collections, digital exhibits, Chronopolis, Samvera, Fedora, and other related services. The primary focus of the group is the Library's Digital Asset Management System (DAMS). (IT, Metadata Services, Digital Library Development, Research Data Curation, meets every other week)
• The Digital Library Operations Group is responsible for the overall planning, supervision, and coordination of digital projects; monitoring the progress of specific projects; identifying resource conflicts and project bottlenecks; and the provision of guidance and support to designated project managers. (Acting Project Managers include Subject Specialists, Archivists,

Curators, and other staff designated as Project Managers, monthly meetings)
• The Digital Library Reformatting Group oversees format conversion for a variety of material types including still image, print, audio, and moving image. This may include transition from analog to digital or from outdated formats to current use digital format types. (Format Specialists, monthly meetings)
• Metadata Policy Group, formerly Cataloging Committee, sets metadata policies for UC San Diego Library resources, coordinates metadata procedures to be implemented in digital projects, and addresses continuing education needs on metadata and cataloging issues. (Members of MPG represent units that are directly engaged in cataloging and metadata functions or directly interact with procedures associated with those functions, quarterly meetings). There are MPG subgroups for Archives Space, BIBFRAME, the DAMS, Roger (ILS), and JSTOR Forum which meet with more frequency.

Special Thanks to:
Input Streams Working Group (small 5 person subgroup of the Products Group) met circa 2014-2016 with charge to develop, document, and improve workflows and processes for ingest of materials into the DAMS; one outcome was more integration of Confluence/JIRA in tracking digital projects
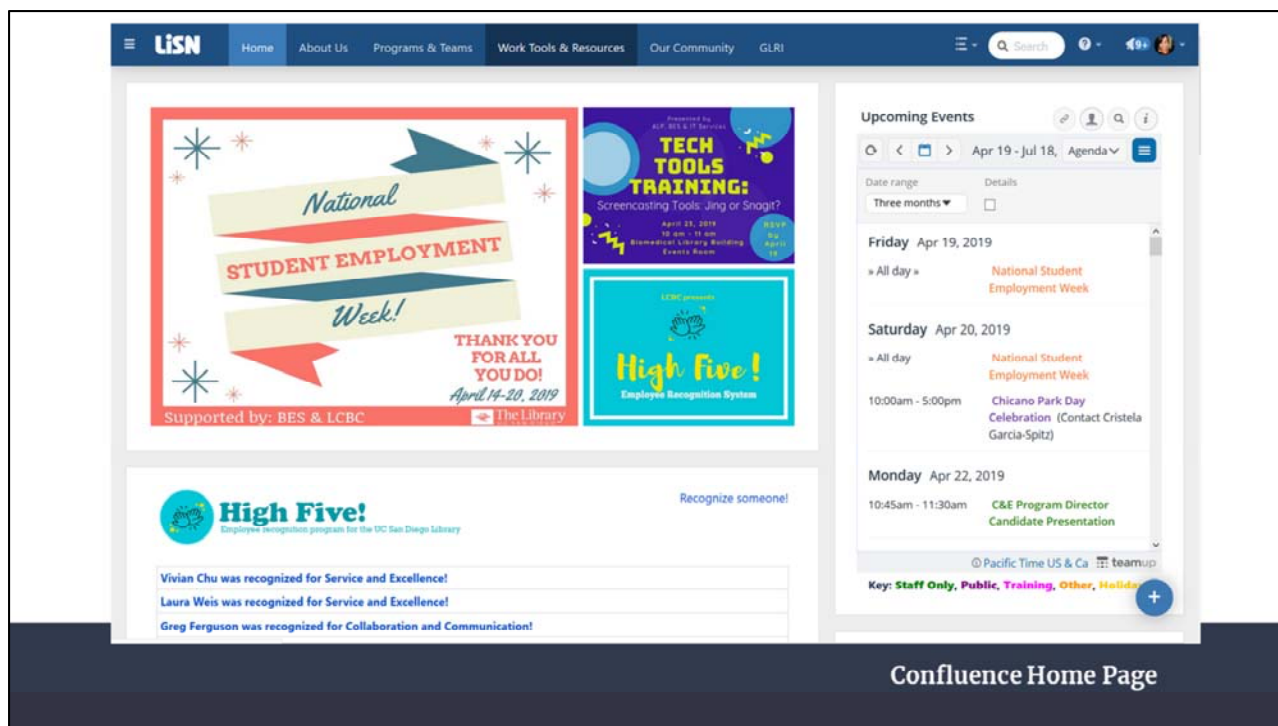
Daily users now: Metadata Analysts & Project Managers

Demo: warts and all!
Confluence - home > DLDP > Digital Projects > Project Plan
JIRA - Dashboard > CPP/DI tickets > Board
Current Projects Report

Confluence Home Page

Confluence, a wiki based knowledge management tool, is used to coordinate activities between various programs in our Library (e.g. digital library development, research data curation, special collections and archives, metadata services, and information technology)

- Started with pilot project in 2009
- Created the existing DLP space in January 2010
- Since then, there has been adoption throughout the Library
- Over the years, there are added features like page templates, tasks

Internal Communications Working Group worked to migrate our old cms intranet to Confluence in 2015. Developed "skin" in order to have top navigation, added plugins and widgets to customize content, and put a lot of thought into the information architecture.
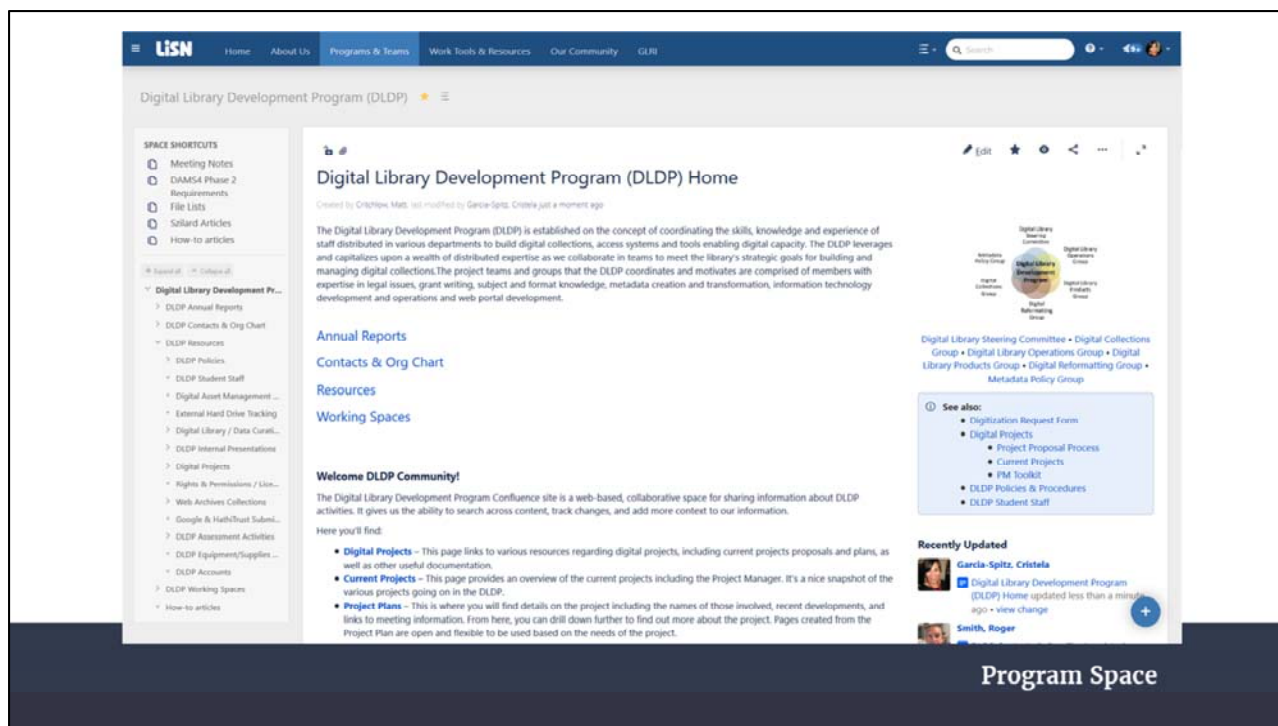
Confluence is organized into Spaces and Pages (hierarchical structure Parent/Child Page)
Determined how pages are grouped, and name pages consistently

For example, every program/committee has a landing page with a brief description. There are four standard child pages under the landing page: Annual Reports, Contacts & Org Chart, Resources, and Working Space. The resource and working space sections are structured according to the needs of the program or committee.
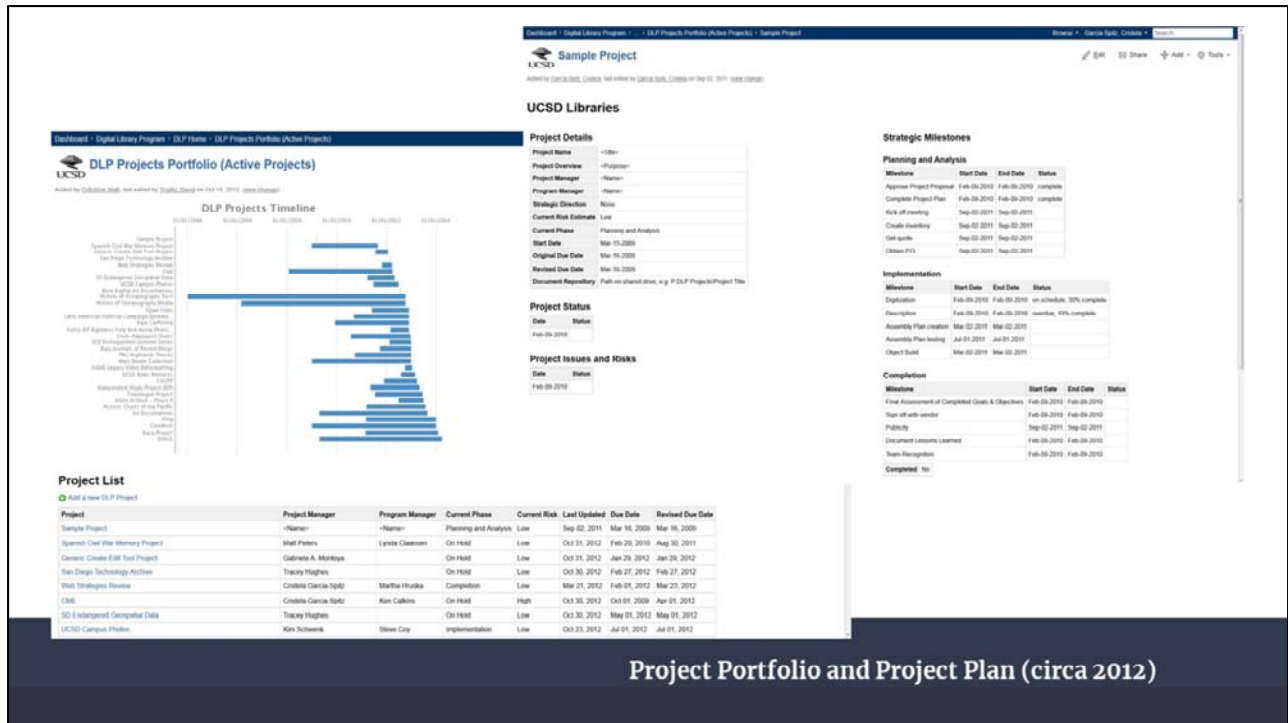
Digital Projects Page
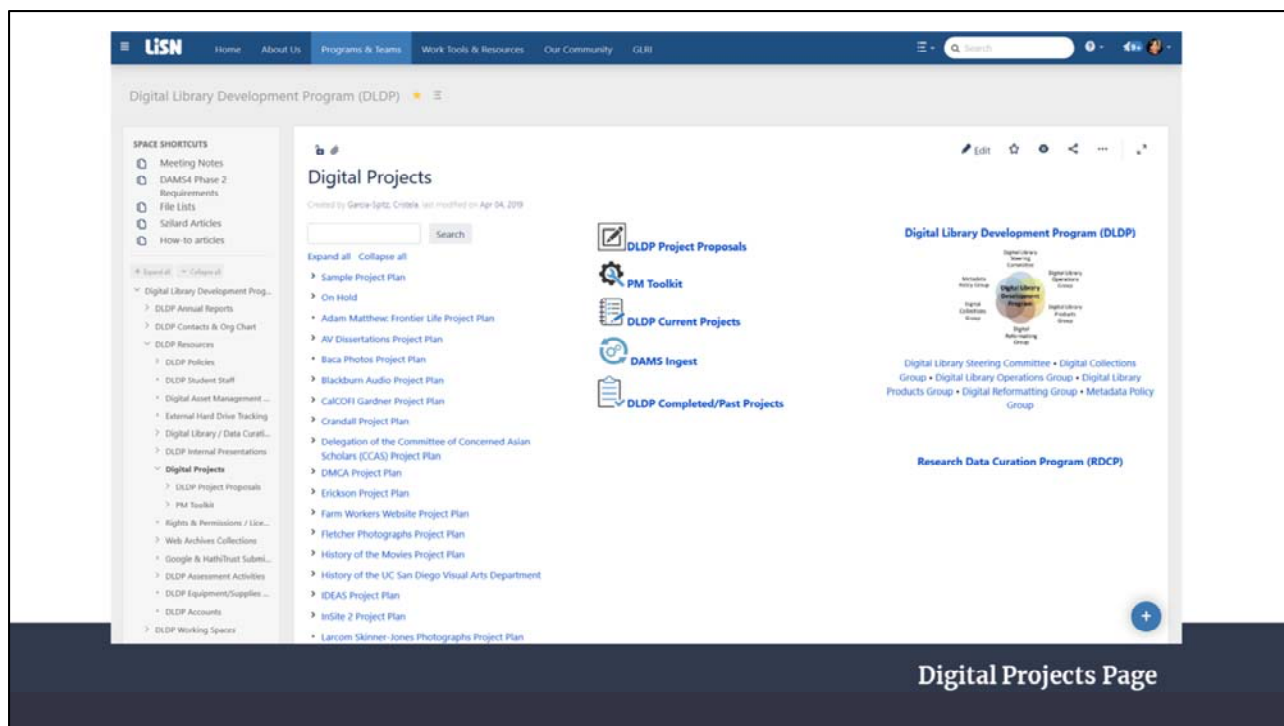
In Digital Library Development Program, first worked to make sure every project had a project plan

All the current project plans are listed under the Digital Projects page

This page also links out to related content (proposal forms, project management toolkit, other committee spaces)

Project Portfolio and Project Plan (circa 2012)

Originally kept track of project portfolio information in tables using Confluence plugins (Scaffolding, Linking, Reporting, and Graph) circa 2012

But over time, the cost and maintenance of the plugins became problematic
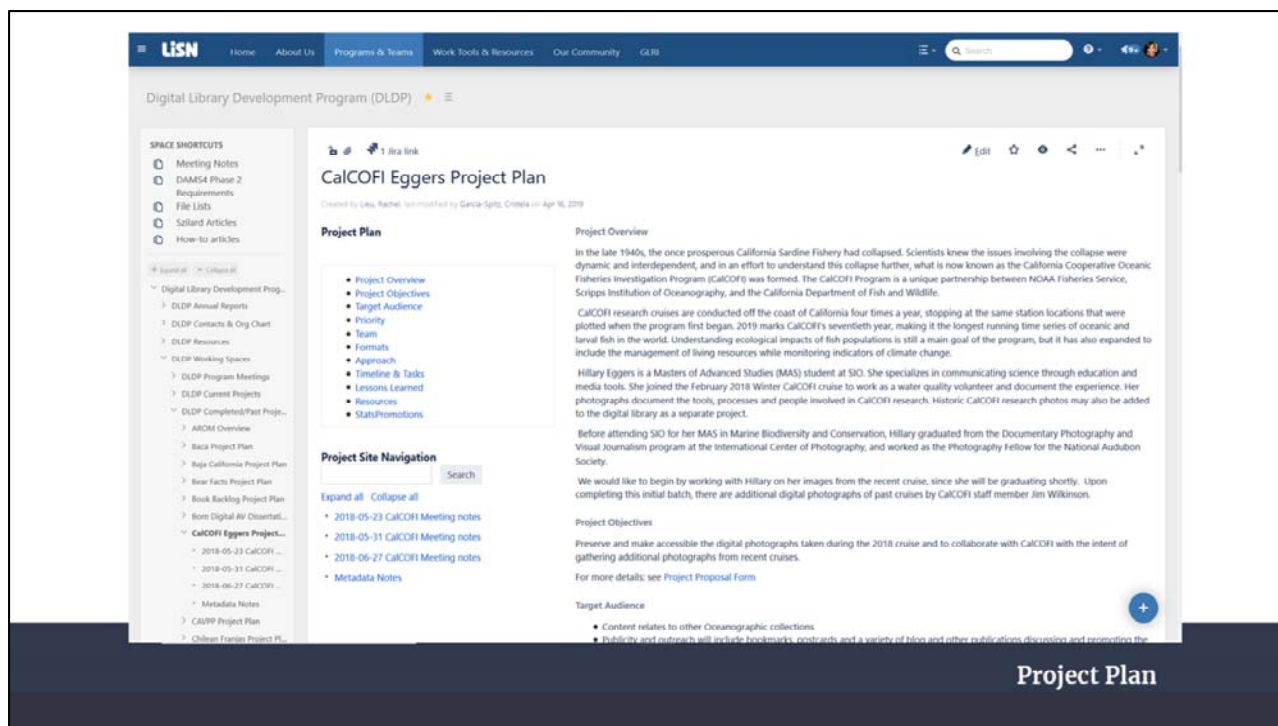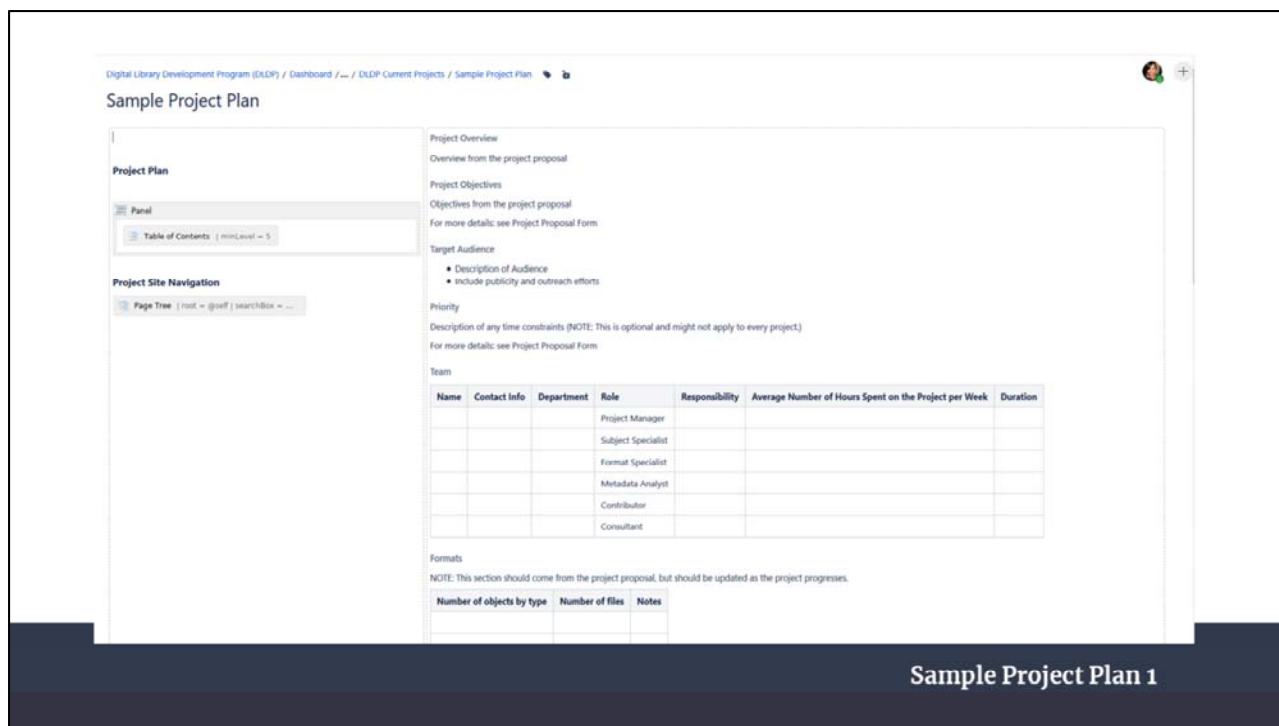
Project Plan

When we could no longer support those plugins, we started to rethink how we could incorporate project planning into Confluence.

Project plan captures information like project objectives, project team, etc. consistently and uses out-of-the-box Confluence features (widgets, basic page formatting)

Goals:

- Make planning & executing a project easier
- Provide the foundation for project planning, scheduling, & resource allocation
- Create transparency & consistency across projects

The project plan has all the same general sections, and serves as the project landing page. Any project documentation, e.g. meeting notes, metadata specs, etc., are child pages of the project plan.

Sample Project Plan 1

To do this, there is a sample project plan, which is a structured Confluence page using specific page formatting and widgets, that can be copied for each new project.

Seen here is the use of the Table of Contents and Page Tree widgets for the left navigation.

The project plan sections are headers and tables which can then be filled out with the specific project information.

The project plan can also easily be exported and act as a final report at the conclusion of the project. Eventually, we plan to ingest the project plan into our DAMS with the collection.

Formats

NOTE: This section should come from the project proposal, but should be updated as the project progresses.

Number of objects by type	Number of files	Notes

Approach

- Digitization (in-house group or vendor details, arrangement of items, filenaming scheme, any specs, etc.)
- Description (existing metadata or metadata enhancements, tools used e.g. Archivists' Toolkit or spreadsheet, or standards followed, etc.)
- Special Circumstances (any precedents or any thing that necessitates additional support, e.g. format type that has not gone into the DAMS yet and will require the Digital Object Viewer to change in support of it)

Collection(s):

- List any collections or subcollections of these digital objects
- Description for the Browse by Collection page
- Thumbnail for the Browse by Collection page

Rights:

- Copyright Status (select one as indicated in the Checklist for Determining Access Options form):
  1. Public Domain
  2. UC Regents
  3. 3rd Party holds the copyright & license agreement exists permitting internet distribution
  4. 3rd Party holds the copyright & NO license agreement exists
  5. Unknown
- For further details, see: Checklist for Determining Access Options

Access:

- Access Level (as indicated in the Checklist for Determining Access Options form)
- Are there links that need to be updated (MARC records, finding aids, etc.)?
- Does there need to be a collection MARC record? See CLIR/Roger Task Force - Project Scenarios and Recommendations

Timeline & Tasks

Roadmap Planner

2017 Oct	Nov	Dec	2018 Jan	Feb	Mar	Apr	May	Jun
Project Planning								

Sample Project Plan 2

The sections are broad enough that they can be applied to many different types of projects.

And the information on the project plan is kept fairly brief and high level (tables and bullet points).
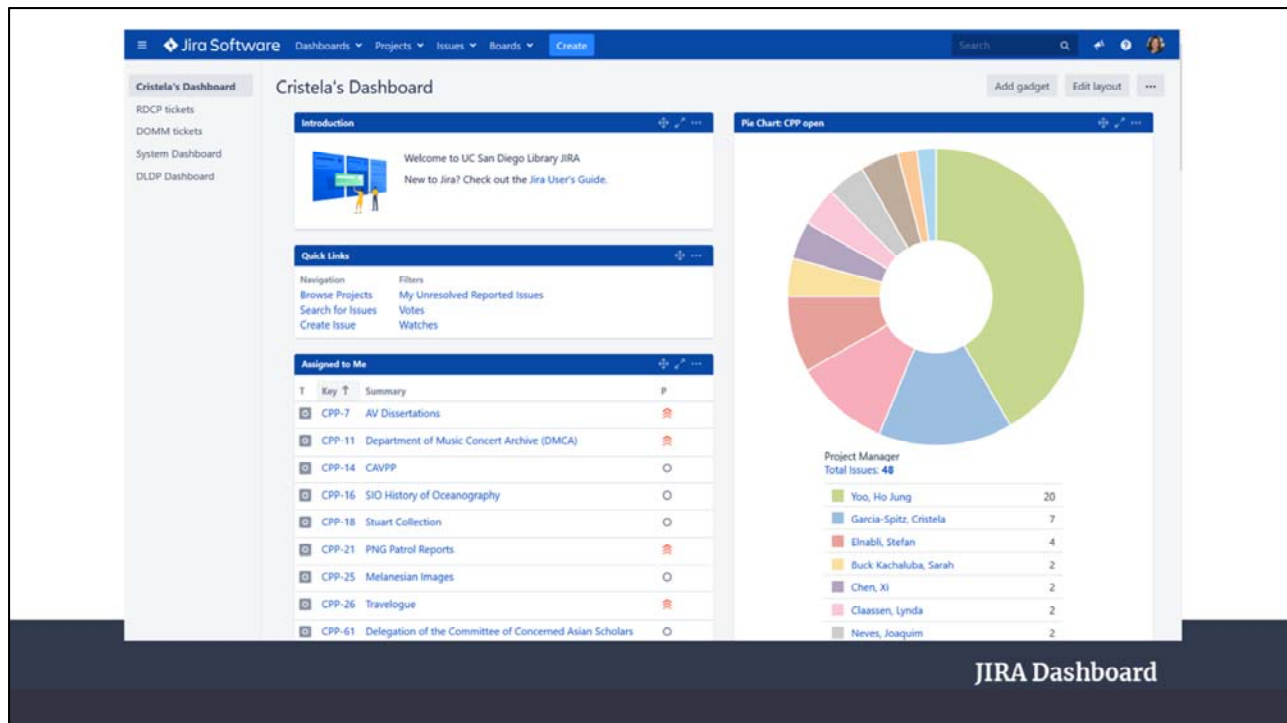
Sample Project Plan 3

We've been experimenting with using the Roadmap Planner as a way of capturing milestones and project timelines/phases.

And we begin using the Task Report to capture and display any outstanding tasks on the child pages (e.g. meeting notes, etc.)

The project plan also links to the project's JIRA ticket, which we will look at next.

JIRA Dashboard

JIRA is used for issue tracking. Initially used by our Library IT development team.   We decided to explore whether it could be used for tracking digital projects.

Increased integration within the two tools (Confluence + JIRA) has allowed for better ways to document decisions, customize workflows and report out on progress.

Our programmers started using JIRA in 2007 with an Academic License.

Cloud vs Server

1. We use the Server products, which are the locally hosted versions. The Cloud is a good option if you don't have your own resources.
2. One of our admins upgrades Jira and Confluence monthly, usually they are small patches, quarterly there are large patches (feature releases).
3. Server = one-time, perpetual license. Cloud = subscription
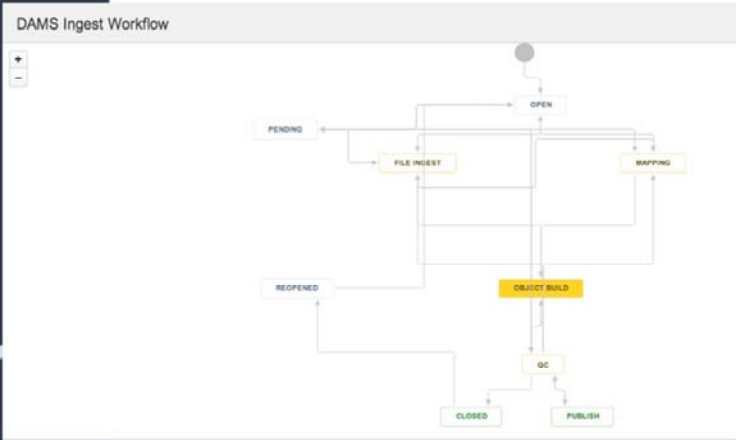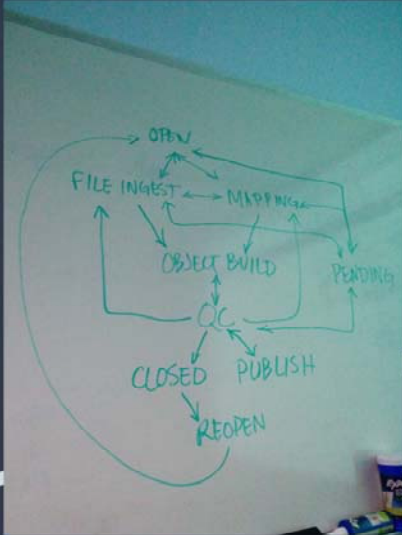
Input Streams Working Group did a whiteboard exercise to develop the workflow that could be implemented in JIRA and displayed as a report in Confluence.

We were looking for a way to recreated the project portfolio table and graph that we had using Confluence plugins.

Goals

- Document work and measure progress throughout the project lifecycle
- Delegate tasks and responsibilities
- Create accountability and commitment for specific project tasks
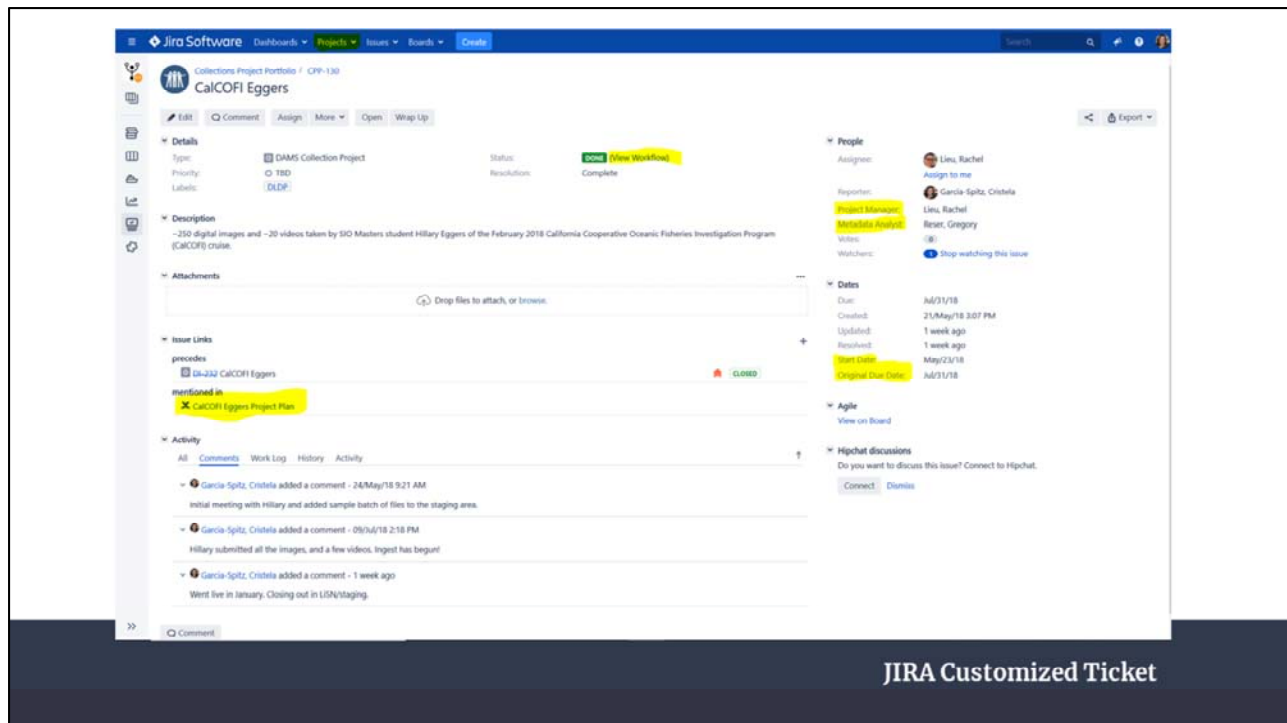
JIRA Customized Ticket

Created CPP for Collections Project Portfolio a new ticket type, or "Project" as it is called in JIRA.

Came up with the steps for a custom workflow and added custom fields like Project Manager, Metadata Analyst, Start Date and Original Due Date.

The steps in the custom workflow display as Status in the JIRA ticket.

This allows us to track project information more granularly. These customizations do not require any special plugins.

JIRA Administrators have the privileges to carry out these customizations.

We use the comments field to provide any project updates or note any issues.

Report in Confluence

We then could create a report in Confluence based on the information gathered in the JIRA tickets.

Seen here is the information from the CPP tickets displayed in a table. The columns can be sorted so we can view the projects by status or by project manager or by date, etc.
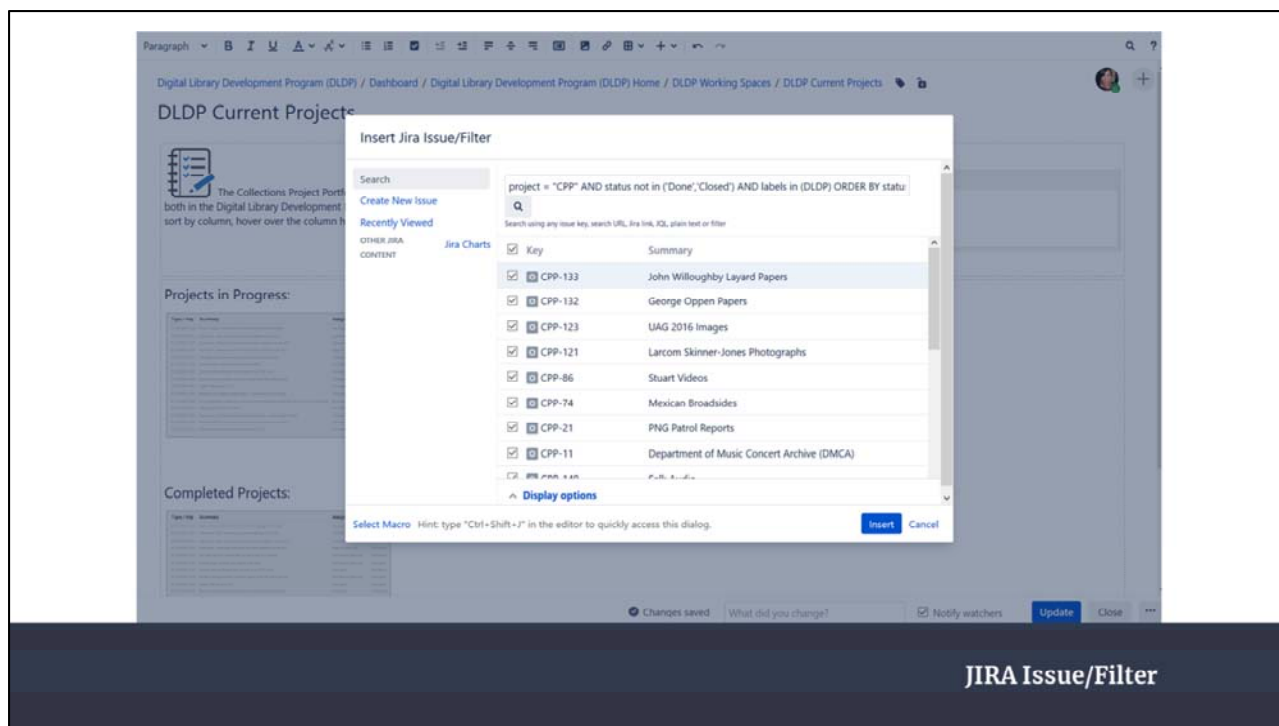
JIRA Issue/Filter

The report is created by using the JIRA Issue/Filter macro.

Here is the search string used:
> project = "CPP" AND status not in ('Done','Closed') AND labels in (DLDP) ORDER BY status

For this report, we wanted all the active digital library project tickets (limited to CPP tickets in JIRA) with a status that was not Done or Closed and labeled as Digital Library Development Program DLDP (not any of our Research Data Curation Projects which are labeled RDCP)

The second report on the page uses this search string:
> project = "CPP" AND status in ('Done','Closed') AND labels in (DLDP) ORDER BY updatedDate DESC

It displays completed digital library projects.

JIRA Dashboard Gadgets 1

With the customized CPP tickets, we also started to take advantage of some of the built-in features of JIRA. For example, the JIRA Dashboard has many gadgets.
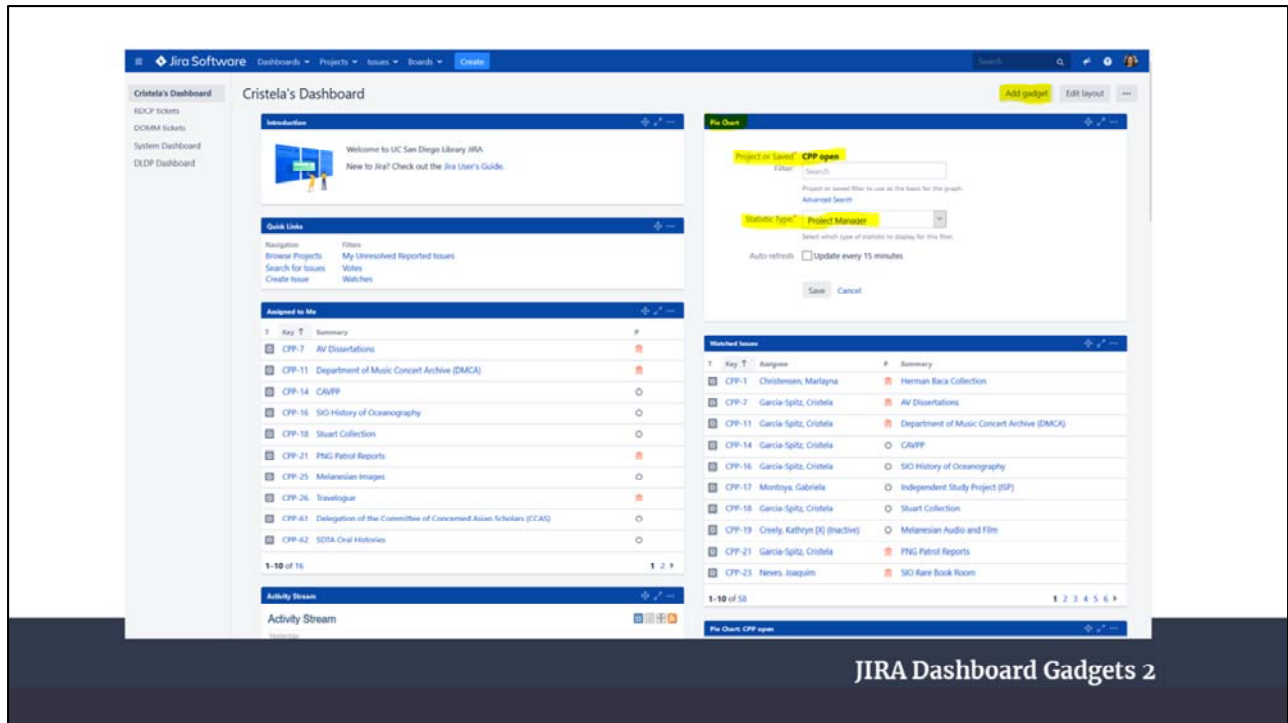
JIRA Dashboard Gadgets 2

Here I have added a pie chart to display the digital projects (or CPP tickets) by Project Manager. From here I can quickly view how many projects are assigned to each project manager.

JIRA Dashboard Gadgets 3

If I click on the Project Manager's name, it displays a search and lists all of the projects assigned to them. I can then view those projects by status or date. This can be useful for resource planning to make sure someone is not overloaded, etc.
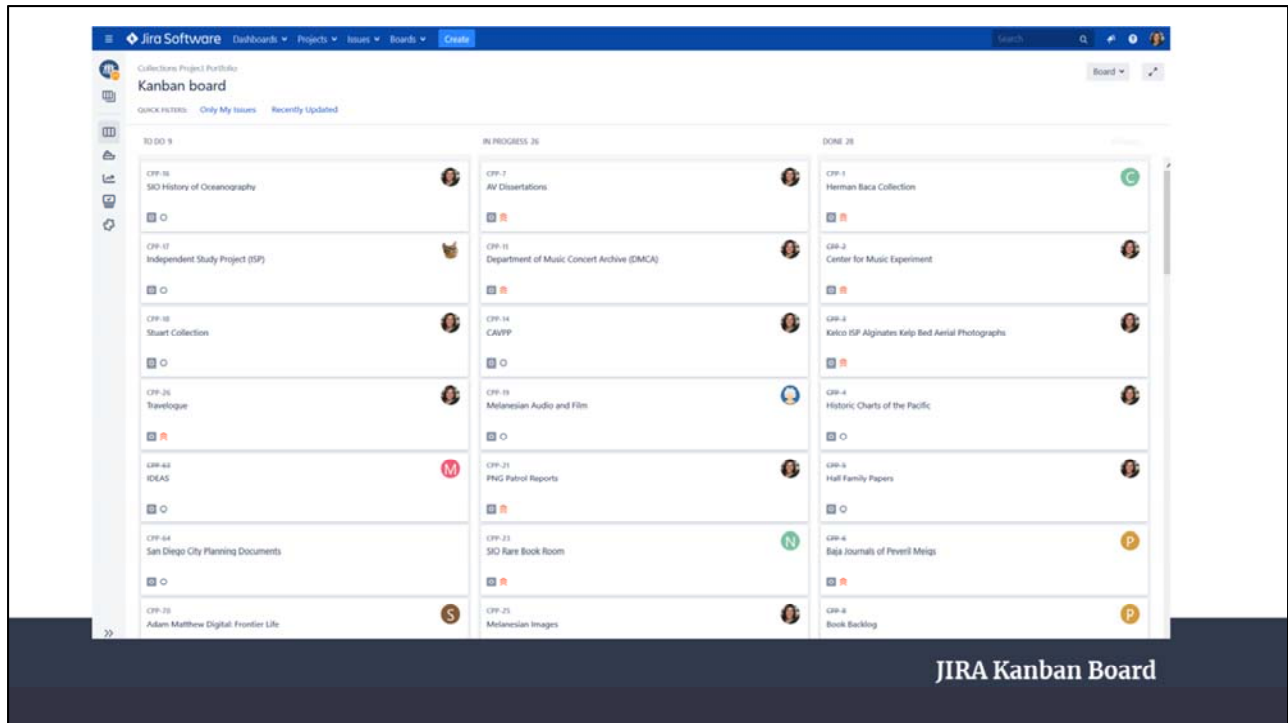
JIRA Kanban Board

And there are other JIRA built-in features such as this Kanban board which can provide other ways of viewing the digital project tickets.

Project Portfolio Benefits

Record/track work.

Provides perspective.

Aligns work of different programs within the library.

Encourages participation/ownership of work.

Creates technical solutions...but there is still human element to collaboration.

Main goal: track work but also useful in organizing and keeping a record of projects

There is one list to go to, which provides visibility/perspective on projects: List View / Drill Down to the Details

Allows us to think more strategically about work & people (e.g. work of different programs, planning for on-boarding/retirements)

Assign specific roles and duties; helps clarify who is working on what

Big help to see project information displayed this way, but still takes meetings and discussion to do the work - doesn't replace face-to-face component to collaboration

Project Portfolio Challenges

Gotta use it.

Balance investment & maintenance costs with benefits.

Incorporate some but not too much customization.

Get buy-in.

Stay flexible.

Only useful if kept up-to-date.

We have incorporated periodic review:
1. monthly Digital Library Operation meetings with all Project Managers doing a round robin on project and asked to update project plan and JIRA tickets for the meeting
2. Every six months, Digital Library Program staff meets to review all the projects and determine which projects need support/strategize what to focus on and finish up

Balance of investment and benefit - lightweight but utility is in consistently reviewing it
good to keep it simple but, if I could make it more complex
future wish list:
- more dynamic, better way to run reports or analyze how long its taken
- not analyzing risk, dependencies, scheduling to the fullest
- no pipeline from project proposal page vs. digital projects page
- would like to get better about capacity planning
need more buy-in: senior management use of portfolio has been limited; governance structure needs clearer, e.g. role of the Steering Committee vs. Products Group vs. Collections Group in decision-making

Confluence/JIRA specifics

Get to know your tools!

Experiment with:

- Dashboards
- Boards
- Workflows
- Labels
- Fields
- Watching Pages

Lessons Learned

- Plugins made it hard to upgrade to newer versions of Confluence/JIRA. Find a balance in the amount of customization.
- Jump in, but reevaluate along the way.
  - Tweaks allowed for more clarity (adding fields and removing unnecessary steps).
  - Build in flexibility to the workflow (arrows go both ways).
- Think about the reporting and work backwards to figure out how to capture the information for that report.

Confluence/JIRA specifics:
Dashboard - built in feature, user should be able to set up
Workflow, added fields - need an administrator
Could get creative with out-of-the-box features, e.g. labels, watching pages, type of information being captured consistently

We did reevaluate the process about a year after it was implemented to make adjustments (remove some of the steps not used in the custom workflow, etc.). Things evolve in the organization and so it is good to adapt along the way.

One thing that helped with the design was that we knew what we wanted to recreate - project portfolio table with information on the projects, so we could figure out how to capture that information in JIRA.
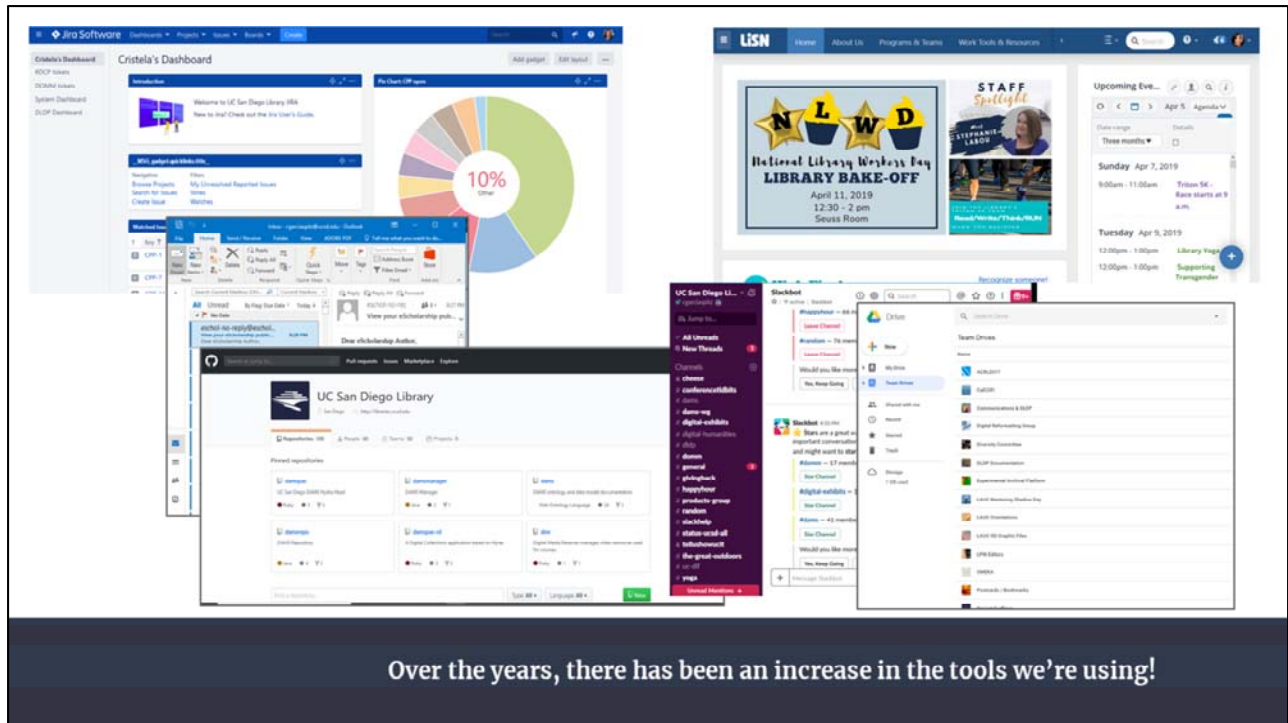
Over the years, there has been an increase in the tools we're using!

Confluence/JIRA gained broad adoption and promoted the use of collaborative software in the Library
Now using many different types of collaborative software in workplace: Confluence/JIRA, Outlook, Slack, Github, Google Drive, Trello, and on and on
Good to strive for single integrated solution, but realistically using different tools for different purposes
Finding the right tool for the right purpose/group

Questions? Comments?
Tools & Tips to share?

Presentation Recording:

https://www.youtube.com/watch?v=UtLLmFWQeQ8

Resources:

https://wiki.diglib.org/DLF_Project_Managers_Toolkit

https://www.zotero.org/groups/2205688/dlf_pmg

Resources available from DLF PMG
Please consider contributing tool/tips in DLF PM Toolkit and Zotero

Thanks!
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If you have ideas for future demo topics, please contact the DLF Project Manager's Steering Committee: https://wiki.diglib.org/DLF_Project_Managers_Group