



A WHITE PAPER by Gerald Aquila, Founder & CEO

HYBRID PPM FOR JIRA: SUCCESSFULLY MANAGING PORTFOLIOS OF HYBRID AND AGILE JIRA PROJECTS

HYBRID PPM FOR JIRA

Jira is also increasingly being used in traditional and hybrid project management processes, but often lacks the level of integration with strategic portfolio and resource management. ONEPOINT Projects aims to close this gap by providing a state of the art, web-based project and portfolio management with a bidirectional, real-time integration with Jira.

THE JIRA REVOLUTION

Jira is one of the most liked and widely deployed issue tracking and agile task management solutions worldwide. IT departments love it for its ultra-simplistic approach to workflow-style task management. Developers like its tight integration with IDEs and source code management systems such as GIT and SVN. Atlassian even provides great add-ons to Jira such as FishEye that provides even more value for developers and quality engineers.

However, Jira is typically not so well received by non-technical knowledge workers, simply because it was not designed to be used by marketing or sales people, business analysts, or controllers. In addition, Jira provides great agile PM functionality on the team level with Jira Agile (formerly GreenHopper), but it lacks real portfolio, multi-project management, controlling, or resource management capabilities. And this

is where ONEPOINT Projects's real-time, two-way Jira integration comes in.

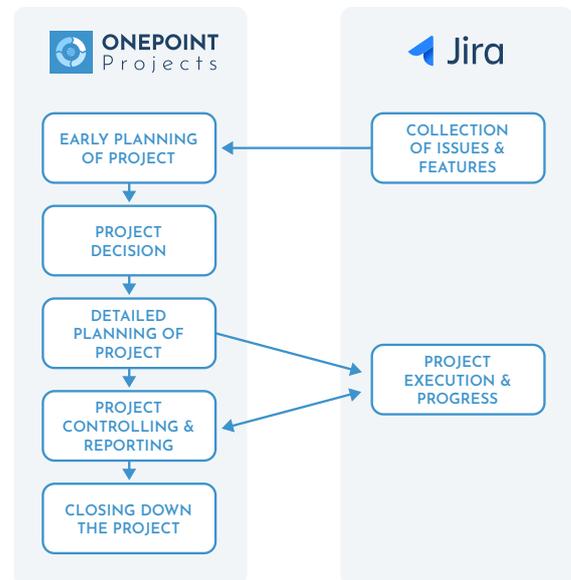


Figure 1: Two-way Jira synchronization process

The main goal of our 2nd generation synchronization with Jira is to provide both non-technical knowledge workers and IT staff with the best project management environments available - without having to ever enter any information twice. Project and team managers can do project and resource planning in ONEPOINT Projects using state-of-the-art, easy-to-use PPM functionality. Developers and engineers can work entirely within Jira while all progress is synced back to ONEPOINT Projects, so project managers and controllers have always access to up-to-date effort, cost, and progress information.

FROM IDEA TO PROJECT

Project ideas are typically "born" in a PPM system, rather than a mainly execution-oriented environment such as Jira. In ONEPOINT Projects project ideas or business cases are often treated as normal

projects that are in an early "IDEA" stage and thus, are already part of the project pipeline. By outlining a potential project team, resource planning across projects is already possible early on. Of course, at this stage it typically only makes sense to assign so-called "pools" (teams, e.g., Sprint teams) beside some key resources. It can also be of advantage to set project probabilities in this stage, so resource forecasting is only calculated based on weighted resource assignments according to probability. Thus, it provides a more realistic picture of the probable future resource utilization.



Figure 2: ONEPOINT's clear project pipeline

EARLY PLANNING - QUICK WINS

Once a project becomes more likely, the project manager will start preliminary planning - this often also involves either coming up with a rough cost estimation, or matching an early cost plan with a designated budget. In order that the PM can reuse already existing issues, improvements, features, and tasks from Jira she can now already link to an existing Jira project or version. As this will automatically bring in all existing Jira issues (within the given scope) into ONEPOINT Projects as ad hoc activities and issues, the PM can freely decide what she wants to reuse in her early project plan and what not. She can even reuse existing

initial estimations from Jira meaning that also cost information is already pre-calculated based on hourly rates defined within ONEPOINT Projects.

The project manager has two distinct advantages with this approach:

1. She can delegate and reuse existing information easily from Jira and
2. She can add additional planning dimensions that are not available in Jira.

One example is risk and response planning - an important and critical part of overall project planning, especially in the early stages. Another practical aspect is milestone planning which makes especially sense in terms of release planning, or program management in general. In addition, the PM can also include deliverables and link them to planned activities for client-side, external projects.

ANALYZING AND PRIORITIZING

Results from preliminary planning together with manually-evaluated project criteria form the basis for strategic project prioritization and portfolio analysis. Beside portfolio-level scoring models, tabular and bubble chart analysis, ONEPOINT Projects also provides a unique visualization of up to 12 project dimensions simultaneously using so-called "dynamic project symbols". With these kinds of tools at hand, project prioritization becomes a breeze and ongoing portfolio analysis can even take dynamic progress information from Jira into account.

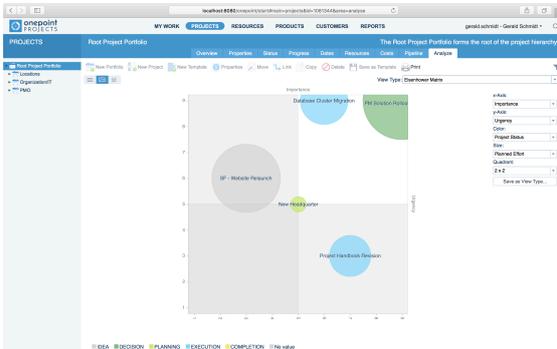


Figure 3: Project prioritizing using bubble charts

Another distinct advantage is the fact that with this approach, all kinds of projects can be analyzed using a single, central, and consistent project repository. Non-technical projects, Jira projects, even programs consisting of Jira and non-Jira projects are part of the same project pipeline and can be evaluated based on a single set of business criteria to ensure the strategic alignment of all projects to defined company goals.

DECISION & PROJECT ORDER

Once a project is decided on, the PM can easily document the project decision in ONEPOINT Projects and easily generate a project order/charter document with the press of a button. The project order is a PDF report that combines project meta information with the current project plan, effort and cost breakdown, milestone list, risk plan, etc.

If the project team is not yet completely staffed, this is typically also the time to fill the remaining seats on the bus. ONEPOINT Projects supports project staffing with skills management that is closely integrated with resource utilization planning. For instance, a PM could easily search for resources available to an extent of 50% between July

and August who are fluent in French and have deep database optimization know-how.

VISUAL RESOURCE PLANNING

The next step is to come up with a more detailed project plan and optionally assign resources on a per-activity level. ONEPOINT Projects allows you to also plan resources only on the pool level (e.g., for Sprint team planning), but resource assignments can only be synced directly to Jira for single-resource assignments. If multiple resources are assigned, or a pool is used, ONEPOINT Projects syncs the activity without resource assignment and leaves the assignment up to Jira based on its default assignment rules for the given project or version.

Note that even while you cannot directly map pool-based resource planning to Jira, it still provides invaluable advantages to be able to do high-level (Sprint) team planning. After all, resource planning is about the future, not about the past. You will also be able to compare your resource planning to the actual time tracking information that will be synced back from Jira or Tempo work-logs.

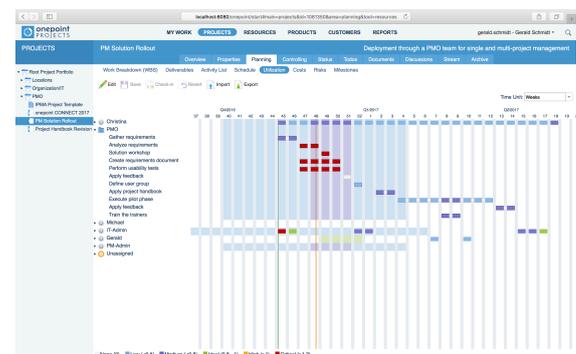


Figure 4: Resource planning and conflict resolution

PUTTING THE PM IN CONTROL

For executing a project in a consistent way, the PM has full control on when the project and resource plan is "pushed" to Jira for the first time - when she performs the so-called initial "check-in". ONEPOINT Projects provides built-in, automatic version control for project plans: the PM can work on a private working copy of the project plan without the risk of confusing other PMs or project contributors. However, in contrast to many other solutions this working copy is already securely stored on the server and even provides real-time previews for all project monitoring and resource utilization views. In other words, the PM can "play around" with the project and resource plan until satisfied and then control very easily when she wants to "unleash" the new plan version onto her project contributors and fellow PMs.

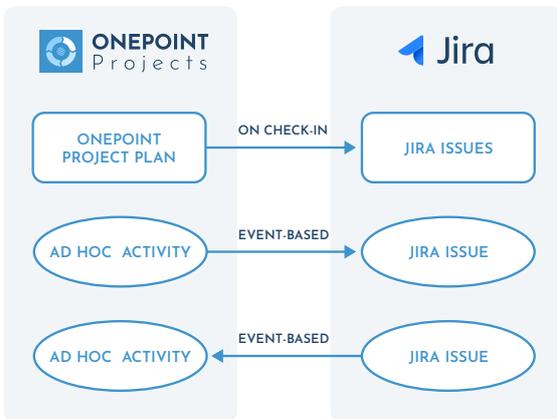


Figure 5: Full control vs. dynamic ad hoc synchronization

By checking-in a new project plan version the project plan is "hard-pushed" to Jira ensuring that the PM remains in control. On the other side, all issues and activities that are not part of the plan have a much more dynamic nature: they are synced two-way in

both directions. This way, the PM can decide what parts of a Jira project to keep under strict control and what parts she wants to keep dynamic for maximum agility.

PROJECT EXECUTION IN JIRA

Meanwhile developers and support engineers can already work on both ad hoc and more strictly planned Jira issues in the same natural and consistent way. All time and progress updates including status changes and revised estimates are automatically synced back to ONEPOINT Projects allowing the PM to have instant access to up-to-date actual and progress data. Everyone can work using their preferred tools and environments and not a single bit of information has to be entered twice.

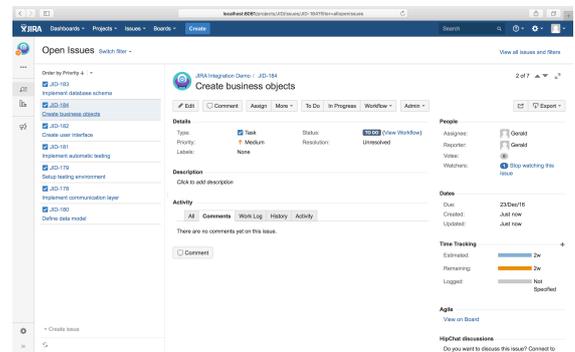


Figure 6: Projects are still executed within Jira

The same is true for comments and attachments that are added on both sides. Comments are simply added up based on their creation date and time. If a single attachment is updated concurrently on both sides, the newest information gets preference - regardless whether it comes from Jira or ONEPOINT Projects. This ensures up-to-date project information and a consistent flow of data.

INCLUDING EXTERNAL PARTIES

It is even possible to more easily distribute information to external parties involved in certain tasks that have neither access to ONEPOINT Projects, nor Jira, as you can easily create a work instruction report based on a planned activity. The PM can then simply distribute the resulting auto-generated PDF document via email and incorporate the progress on such a task manually.

THERE ARE NO PERFECT PLANS

However, there is nothing like a perfect project plan. This is why ONEPOINT Projects allows all project contributors to create ad hoc tasks and issues in parallel to planned activities. This way, overlooked or new requirements can be quickly added to the project's scope without waiting for the PM to find the time for updating the plan. The PM can still easily reuse ad hoc tasks and issues with the press of a button in a new project plan version - complete with already tracked actual effort, progress information, attachments and comments.

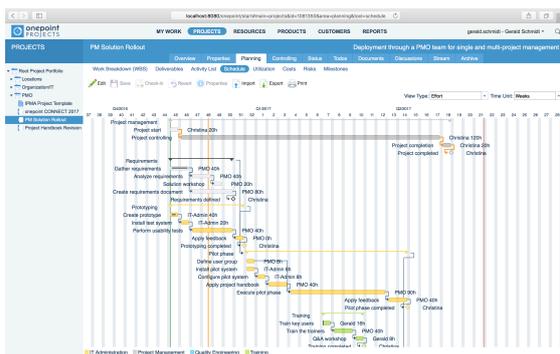


Figure 7: Scheduling for Jira-executed projects

Since a project team often consists of both non-technical knowledge workers and IT personnel, ad hoc tasks and issues are always synced in both directions. Issues

created in Jira are synced to ONEPOINT Projects and ad hoc tasks originating in ONEPOINT are synced to Jira. Therefore, both sides can dynamically add to the scope of a project without having to leave their natural working environment, or entering any information twice.

AGILE PROJECTS DO COST \$

A detail sometimes overlooked when going agile on the team level is that it is no longer easily possible to get accurate planned or actual cost information from agile projects. Project costs might not be important for all kinds of projects, but costs can be relevant for business planning and development, for government grants, or for client/external projects.

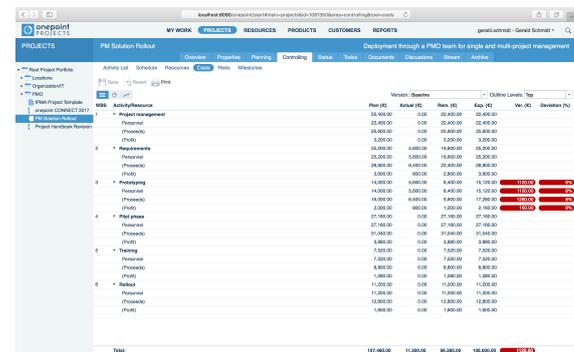


Figure 8: Quick access to effort & cost plan/actuals

Since ONEPOINT Projects calculates planned costs based on the assigned effort both on the resource and pool levels, you always have a consistent cost baseline. But ONEPOINT also automatically calculates actual and open costs (cost-to-complete) based on actual hours - both internally and when synced from Jira or Tempo. This not only provides the PM with up-to-date access to complete project cost information, but also enables related functionality such as plan/actual comparisons, Earned Value KPIs

and charts, and automated cost-based traffic lights for Jira-executed projects.

PROJECT & PORTFOLIO CONTROLLING

A very nice "side effect" of the way ONEPOINT Projects' 2nd generation Jira integration works is that the ONEPOINT project repository aggregates all project-relevant information from Jira and combines it with other important data that cannot be stored in the Jira database schema. For instance, a Jira-executed project plan can include milestones - they do not really make sense in Jira, so they are not synced to Jira, but they are still part of the plan and can be monitored in ONEPOINT.

In other words, all of ONEPOINT's controlling tools can be used with Jira-executed projects including dates, effort and costs plan/actual comparisons, Earned Value charts, milestone tables and the built-in milestone trend analysis. Also, all automated traffic lights (general, resources, costs, dates) trigger based on Jira-synced actual and progress information. And of course even ONEPOINT's portfolio controlling views (status, progress, plan/actuals, dates, pipeline) and dynamic project criteria are recalculated using progress information from Jira and Tempo.

STATUS REPORTING FOR JIRA PROJECTS

However, project controlling alone is typically not enough for a well-managed project. You also need to do explicit, periodic status reporting in order to ensure that your project stays on track. ONEPOINT Projects supports status reporting through status reports that the PM submits once for each reporting interval. The status report allows the PM to provide guidance through

info about the project's progress, issues and necessary decisions, as well as the short-term forecast. She can also comment on automatic traffic lights and milestones, adjust manual traffic lights, and optionally control billable hours.

“Basically everyone is working in an agile way at the team level, but at the end of the day, we still also need classical metrics and KPIs to make informed decisions.”

– **Gerald Aquila**, ONEPOINT Projects

Status reports can be easily printed or sent via email using an automatically generated, document-style PDF project progress report, e.g. for usage in project update meetings. Once submitted, a status report historicizes progress information much like a project plan version documents plan

Key Features and Benefits

Combining the flexibility of Jira with a modern PPM system provides many benefits.

- Optimized resource utilization planning for Jira projects
- Real status reporting featuring customizable traffic lights
- Standards-based risk management and controlling
- Portfolio management criteria and bubble chart visualizations
- Clear overview across all projects with a single project pipeline

changes. In combination with Jira, you combine the advantages of an extremely dynamic project execution model with the power of a well-documented project history without any additional effort.

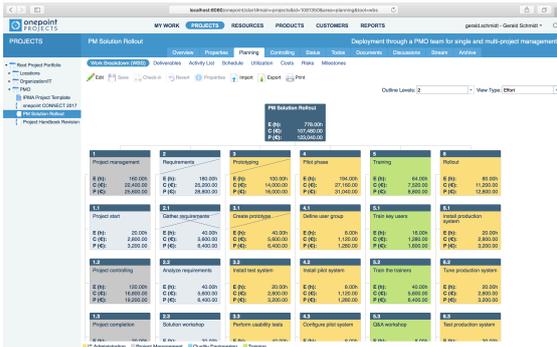


Figure 9: Using the WBS for planning & controlling

Additionally, tying project controlling cycles to Sprint boundaries has proven valuable when closely integrating agile and formal project management. The fact that each sprint should (ideally) deliver a potentially shippable product increment, makes the end of a sprint a perfect time for submitting a status report, since it marks a consistent point in time regarding project progress and status of deliverables. ONEPOINT Projects makes this easy by allowing you to simply synchronize your controlling cycle duration with your default Sprint duration.

DYNAMIC PORTFOLIO AND RESOURCE MANAGEMENT

Synced progress information from Jira also brings in valuable data for project reevaluation and portfolio analysis. Dynamic project symbols show up to 12 project dimensions concurrently while feeding up to 8 of these dimensions directly through Jira synchronization (activity, dates, effort, cost, and overall progress, as well as dates,

resources, and costs traffic lights). Jira progress information for project reevaluation is enabled through dynamic project criteria that can be defined based on a number of built-in project fields, such as actual effort, costs, variances, or even traffic lights.

In addition, resource management and planning directly benefit from synchronized progress information from Jira. For instance, actual resource allocation based on tracked hours can be easily viewed in ONEPOINT Projects, and is also used for automatically calculating actual start/finish dates for activities as well as variances. This is not just valuable information for evaluating current and improving future resource plans, but also provides important guidance for HR and business development in general.

CLOSING & LESSONS LEARNED

Finally, projects end sooner or later: they are either completed, or they get canceled. Formally closing down a project is always a good idea, but you do not want to spend a lot of time on this. ONEPOINT Projects allows to either document project closure in a very simple way by entering a closure date and comment, or you can submit a final closure status report. The advantage of using a closure status report is that you can easily document best practices and lessons learned using closure comments without additional administrative overhead. Of course, you can create a project closure report based on actual data synced from Jira with the press of a button - complete with optional closure comments you may have provided.

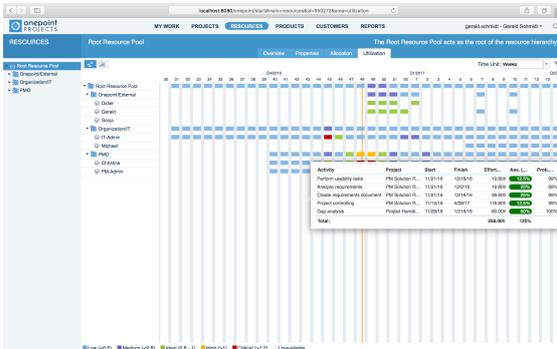


Figure 10: Resource utilization across projects

Again everyone benefits from the two-way syncing approach: developers and engineers do not have any additional work or new tools to learn. Project and team members still get all the information they need in real-time. Even management dashboards are kept automatically up-to-date and provide valuable insights. There is no need to choose between an agile approach that benefits IT teams, or a more formal framework that provides accurate data for informed decisions. Agile and formal project management are no contradiction, they need each other and benefit from each other. ONEPOINT Projects and Jira form a perfect symbiosis closing gaps in the project portfolio process and leveraging their strengths.

Additional Information

Find out more about ONEPOINT Projects unique bidirectional Jira integration by visiting our website at:

www.onepoint-projects.com/solutions/jira