Share Better & Learn More

USING JIRA FOR BETTER COLLABORATION
About Me

- Ruth Kneale
- rkneale@nso.edu
- Systems Librarian
- Daniel K. Inouye Solar Telescope
- dkist.nso.edu
- Support staff in 4 states (and on the mountain)
- I do ALL THE TECHNOLOGY
About JIRA

- Atlassian product
- Bug tracking, issue tracking, and project management functions
- [www.atlassian.com/software/jira](http://www.atlassian.com/software/jira)
How We Used It

- Software issues, of course
- Rolling Action Item Lists (RAILs)
- Conversations where external input was needed
  - i.e., a question about an instrument that a non-staff instrument builder could contribute to
- Questions and clarifications about documentation
- Checklists

An Effective, One-Stop-Shop for Issue Management
<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Description</th>
<th>Location</th>
<th>Duration</th>
<th>Notes</th>
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<tbody>
<tr>
<td>10/01/2023</td>
<td>8:00</td>
<td>Introduction to the project and project goals</td>
<td>Conference Room</td>
<td>1 hour</td>
<td>Overview</td>
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<td>10/01/2023</td>
<td>9:00</td>
<td>Data collection methods and strategies</td>
<td>Conference Room</td>
<td>1.5 hours</td>
<td>Presentation</td>
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<td>10/02/2023</td>
<td>8:00</td>
<td>Data analysis techniques and tools</td>
<td>Conference Room</td>
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<td>Workshop</td>
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<td>10/03/2023</td>
<td>8:00</td>
<td>Results and conclusions</td>
<td>Conference Room</td>
<td>2 hours</td>
<td>Summary</td>
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**Spreadsheet Hell**

*Internet Librarian 2016*  
*Ruth Kneale*  
*Session C204*
The D’oh Moment

Review Items = Issues
New Projects

- Previously categories of Construction and Operations
  - Simple Issue Tracking process style
  - Basic notifications to Reporter and Assignee, add Watchers
- New project category of Reviews
- Process style: Task Management
- New Issue Types: RID, RIC/Q
- New Workflow with multiple new steps
- Components
- More extensive Notifications
New workflow

- Open Issue
- In Progress
- Resolved
- Reopened
- Closed
- Post-Review Action

Diagram showing transitions between stages: Open Issue to In Progress, In Progress to Resolved, Resolved to Closed, Closed to Reopened, Reopened to In Progress, and In Progress to Post-Review Action.
New notification processes

- **Assignee** – Who the action is on
- **Reporter** – Who reported the action
- **Component Lead** – The lead of the item group being acted on
- **Project Lead** – The person in charge
- **All Watchers** – Others who want to see what happens
- **Chair** – The review chair
Dashboards

Two Dimensional Filter Statistics: GFS FFR RIs

<table>
<thead>
<tr>
<th>Components</th>
<th>IN PROGRESS</th>
<th>CLOSED</th>
<th>DEFERRED</th>
<th>POST REVIEW</th>
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Status
Total Issues: 73
- In Progress: 36
- Open: 19
- Deferred: 15
- Reopened: 3
First internal review
Lessons Learned

- Worked well with staff
- A few stumbles with notifications
  - Some folks said too many
  - Others said too few
- Workflow adjusted to include more options
- Determined components were very useful
A more complex review

- Visible Spectropolarimeter
- Wider audience
- External reviewers
  - International ones, too!
- Substantially more review items
- International reviewers
External reviewers

Managing a Review Session:

1. Choose "View" tab and then click the icon next to "View CDR".

2. From here on, when you pull down the Dashboard menu, you can view the "View CDR" option.

3. Click the "View" tab, enter the review site, and then click on "View CDR".

Creating a Review Session:

1. Click the top left corner, then the bottom right corner to Dashboard.

2. In the "Create New" box, enter the name of the review you wish to initiate.

3. Click on the "Submit" button, then submit once the review has been submitted.

4. Choose "Manage Dashboard" – we will allow you access to the review, which will be active.

Additional Workflow Information:

Partner = Associate = Partner who authorized the review. An Associate is raised for this person. You will also have a rating tool.

Task Submission = Submitter: Associate or partner who submitted the review. The submitters will be able to log in to the system.

Task Reviewers = Reviewers: Associates who reviewed the work, and are charged with providing feedback. The reviewers will be able to log in to the system.

Task Actions = Task Actions: Associates who took action to complete the task. The task actions will be able to log in to the system.

For accepted notifications that require the review, such as capturing a document or summary, the role will be that of the Associate. Any task that has been reviewed and the actions are pending.

The Review Center will close tickets at the Forums, in day, and then closed, after the Partner/Associate action is completed.
Current process

- Web Page (presentations, documents)
- JIRA (discrepancies, questions, clarifications)
- Meeting Happens: Any outstanding items addressed or assigned
- Post-Review Actions
- Review Report Issued

Review Needed
What else?

Student work

Collection moves & remodels

Library Catalog

www.istl.org/05-fall/article3.html

www.library.pima.gov
Thank You!

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