Building software at scale with SAFe® 5.0 and Atlassian tools

A pragmatic guide

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Adaptavist
Professional Services

SCALED AGILE PARTNER GOLD

ATLASSIAN
Platinum
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ENTERPRISE

Building software at scale with SAFe® 5.0 and Atlassian tools

A pragmatic guide

by Nick Bialaszewski, William Rojas, Rizwan Hasan and Jennifer Eolin

Contents

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Scaling Agile in the digital workplace

The software products being built today are bigger and more complex than ever before, and the resulting demand has pushed existing development practices to their breaking point. Large organisations feel this pain acutely, often with tens or even hundreds of teams using multiple software tools to run a single business workflow—and frequently without the clarity needed to relate the work back to business strategy and value delivery.

The result? The promises of agile development, like faster time to market and fewer failed initiatives, are hamstrung in enterprise environments when there are no means in place to scale agile effectively.

Now more than ever, the future of the workplace requires digital tooling solutions that can effectively provide a clear visual representation of how the work being delivered relates back to strategic initiatives and customer value. This is the key addition in the 5.0 iteration of the Scaled Agile Framework for Enterprise® (SAFe®): advocating for business agility.

Why SAFe®?

While there are many approaches to scaling agile development teams and practices, we are focusing this white paper specifically on SAFe® because it continues to be the most widely adopted and recognised framework, and thus is a common starting point even for organisations that are new to agile.

This document is a follow up to Adaptavist's 2019 white paper *SAFe® with Atlassian Tools: A pragmatic guide by Adaptavist*.

In this iteration, we go into more detail on the value of SAFe® including additions for SAFe® 5.0, and show how to approach implementation of its practices and principles with Jira Software. In the guide that follows, we'll delve into the Atlassian ecosystem and introduce solutions we have built with our clients to mature their adoption of a scaled agile delivery practice.

Why Atlassian?

A crucial part of any SAFe® implementation is selecting the right toolset to execute the framework day-to-day, with users spanning from senior leadership across to development teams. This is where the integrated Atlassian platform has a lot of benefit and flexibility, offering organisations the ability to pick and choose what works best for their unique business needs and constraints.

Since Atlassian's software can be customised in so many different ways however, we strongly advise that implementation not be taken lightly. A partnership with experienced SAFe® practitioners can be crucial in enabling success with the tools.

Read on to go beyond the theology of SAFe® and explore the pragmatic implementation of SAFe® 5.0 with the core Atlassian toolset. The Adaptavist team will share our experience aligning customers' teams on their journeys of SAFe® adoption. Included are orientations to the tools, configuration best practices, lessons learned, and further learning resources to help you and your team start on your pathway to adopting SAFe® with Atlassian tools.

The evolving role of agile

In 2018, an article in the Harvard Business Review[1] stated that eight in ten businesses building software had committed to adopting agile. And of those, more than half were actually were actually still somewhere in the process of adoption. The takeaway is eye-opening: even 17 years after the The Manifesto for Agile Software Development was written, only about half of organisations have emerged from their journey toward meaningful nd effective implementation of agile. This move to agile is still very much a work in progress in many companies—even in teams in research and development, which have traditionally been the first to adopt new ways of working.

"Agile is not a prescription, nor an instruction manual. It's a shift in culture and mindset. That kind of change doesn't happen overnight in any organisation, large or small."

Jon Kern of Adaptavist
Co-author of the Agile Manifesto for Software Development

Yet in spite of this challenge agile is continuing to spread, even into new (and less obvious) corners of the business. Marketing, finance, and even legal teams are beginning to see the benefits of adopting an agile mindset and processes. Forward-looking enterprises are starting to organise around value, creating opportunities for these newly-agile parts of the business to collaborate and help drive the success of the company in innovative ways.

While maturity of of agile practices and adoption remains a challenge, it's one well worth overcoming. A broad-based, successful agile transformation can yield faster time to market, reduction in defects, increases in productivity, and ultimately happier customers and staff.

[1] https://hbr.org/sponsored/2018/03/survey-data-shows-that-many-companies-are-still-not-truly-agile, 2020, Harvard Business Review, 2018, Cited

The Atlassian platform and SAFe®

Atlassian rolled out Jira 1.0 in 2002 as a better way to help development teams track and manage bugs, and has since built out its platform to include an entire suite of integrated software products that support all major aspects of agile software development. Today the Atlassian platform holds the enviable position of being the world's leading toolset for agile teams, with over 70% marketshare in the software development industry.

When SAFe® 1.0 arrived in 2011, large organisations took notice, as it provided a methodical and prescriptive approach to scale the successes of small development teams. SAFe® is a tool agnostic framework—it focuses more on process and organisational structure, and less on tooling. As a result of SAFe® gaining more widespread adoption, a large opportunity for tooling solutions built around the framework has opened up.

In 2019 Atlassian acquired AgileCraft, maker of a leading enterprise agile planning tool targeted at SAFe® and other enterprise agile frameworks. Jira Align was born as the evolution of the AgileCraft solution, and introduced into Atlassian's portfolio of products. This move has positioned Atlassian as the go-to choice for organisations that want to adopt SAFe®, no matter what stage they are at in their agile business transformation.

The latest version of SAFe®, 5.0, focuses on the transformation of a business into a 'Lean Enterprise' (agile development, systems thinking, Lean product management, and DevOps), as well as improving 'Business Agility' (organising around value streams instead of departments). This is where Jira Align shines, as the tool provides robust reporting and feature sets to measure agile transformation, and visualises this with data from the Jira systems used by development teams.

SAFe® 5.0 requires new mechanisms and management techniques that pose significant challenges for the tools:

- How to get a holistic view of the agile release train
- How to use the tools to run a program increment planning event
- How to leverage Atlassian's rich feature set
- How to get crucial reports and analytics for decision support

For a deep dive into SAFe® 5.0, we recommend digging in at the source: Scaled Agile, Inc

Making a safe bet on your toolset

A robust tooling framework is necessary to underpin SAFe®, enabling teams to work within its principles and deliver solutions and innovation to market faster in a digital workplace. But vetting, implementing, and optimising the right tools for the job can be a long and tedious process, especially if the following apply:

- The delivery teams as a whole are new to SAFe®
- Internal bureaucracies for purchasing new, expensive software in a large, distributed organisation add complication

To ease this pain, Adaptavist has developed a core SAFe® configuration based on products that most Atlassian customers already have—Jira Software, Jira Service Desk, Bamboo, and Bitbucket—that can be applied pragmatically in step with an organisation's progress toward SAFe® adoption.

And for organisations whose demands and practices are of a scale and maturity that warrant a more all-encompassing solution to measure business value, Jira Align will help bring even more clarity and focus, especially where tools like Jira Software are already in use.

The tried and tested Adaptavist SAFe® solution for Atlassian tools can be configured for flexibility to suit the specific compliance requirements, security, process, workflow, and budget constraints every organisation has, while still supporting the seven core competencies of SAFe® 5.0:

Lean-Agile Leadership

Team and Technical Agility

Agile Product Delivery

Enterprise Solution Delivery

Lean Portfolio Management

Organisational Agility (new to 5.0)

Continuous Learning Culture (new to 5.0)

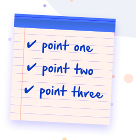
What follows in this paper are the big things **you need to know about the changes to SAFe® 5.0,** and what they mean for development tools and teams.

We'll outline an approach to configuring Atlassian Jira and other products for SAFe® intake-to-release, as well as how to approach implementation. Lastly we'll touch on some high-level outcomes to expect as you progress along your path.

If you’re in need of an experienced partner to help you on your journey with SAFe®, the Adaptavist team is here to help.

Atlassian tooling at a glance

Atlassian has been adding tools to their stack since rolling out Jira 1.0 (issue tracking) in 2002 and Confluence (knowledge management and collaboration) 1.0 in 2003.
Let's take a quick look at Atlassian's list of integrated tools and capabilities.



Plan and track

Jira Software

Jira Align

Confluence

Support and fix

Jira Service Desk

Opsgenie

Statuspage

Code, build, and ship

Jira Software

Bitbucket

Bamboo

Sourcetree

Collaborate

Confluence

Trello

Jira Core

Manage portfolio and strategy

Jira Align

In addition to the software offerings, there are over 4000 third-party add-on applications available in the Atlassian Marketplace.

Jira Software is the cornerstone of our SAFe® tooling solution, no matter which configuration of tools are implemented. Its Projects, Issue Types, Workflows, Custom Fields, and Boards provide all of the necessary elements to construct and manage Portfolio backlogs, Large Solutions, Programs, Program Increments, Teams, Stories, Defects, and many more items.

Jira Align can be thought of as an 'almost all in one' tool for implementing SAFe® as a framework, without the need for the detailed Jira Software configurations and customisations outlined in the following sections of this paper.

It is important to note however, that most organisations which have implemented Jira Align still rely on Jira to be the foundation on top of which Align can effectively operate. Making sure that development teams are practicing proper 'agile hygiene' in Jira is the common practice of orgs using Jira Align.

Integration overview

These tables contain a quick overview of Atlassian's flagship products and their integration capabilities to build your customised SAFe® solution.

Fig. 01 Atlassian Products

Atlassian product	Solution role	Product description
Jira Software	Issue tracking, project management	Track, plan, and manage all types of work
Jira Service desk	Request intake and management	Receive, track, manage, and resolve requests from your team's customers
Confluence	Document collaboration	Content collaboration and knowledge sharing
Bitbucket	Source code repository	Git and Mercurial source code repository hosting, security, pull requests, and more
Bamboo	Continuous integration / deployment	Integrated and automatic build, test, package, and deploy functions for products under development
Atlassian Marketplace	Third party extensions for Atlassian products	Apps that extend the out-of-the-box functionality of Atlassian products
Jira Align	Portfolio management, program management, product management	Connect business strategy to execution, plan and manage product investments

Integration overview continued

These tables contain a quick overview of Atlassian's flagship products and their integration capabilities.

Fig. 02 Atlassian Product Integrations

Atlassian product	Integration options	Integration benefits
Jira Software	Confluence, Bitbucket, Bamboo	• Expose Jira issues and filters on Confluence pages • View and manage commits, branches, and pull requests from Jira • View and manage builds, tests, and deployments from Jira
Confluence	Jira Software	• Expose Jira issues and filters on Confluence pages
Bitbucket	Jira Software, Bamboo	• View and manage commits, branches, and pull requests from Jira • View build and test results from Bitbucket
Bamboo	Jira Software, Bitbucket	• View and manage builds, tests, and deployments from Jira • View commits and issues from Bamboo
Jira Align	Jira Software (at time of writing)	• View and manage product features from Jira Align into Jira and vice versa • Expose and remediate planning issues in Jira

So which tools are right for you?

This is a great question, and one we hear a lot. Years of experience in the SAFe® realm have helped our hundreds-strong team of technical engineers, business agilists, and Atlassian experts to develop a methodology to analyze and assess each organisation's tooling needs when it comes to SAFe®.

We feel the best approach is to tailor a suite of tools that fits each unique team and company, and addresses their goals and constraints in a bespoke manner. Adaptavist avoids absolutes and encourages teams to discover what they really need versus what they think they need. No two companies will ever have the same set-up!

Some organisations will find a configuration of Atlassian Jira Software to be their pathway to success. The one detailed in this paper, with carefully chosen add-on apps, customisations, and the integration of complimentary Atlassian tools, is a great place to start. Others will adopt Jira Align, a powerful tool that's built specifically for SAFe® and other scaled agile frameworks.

A seamless integration is critical to getting teams up and running in their new workflows. Regardless of the specific path chosen, a SAFe® tooling solution using Atlassian software provides both the power and the flexibility to accomplish this best. If you're looking for expert SAFe® tooling consultation, you can always reach out to our team.

A note about Cloud deployments

We have implemented parts of the solution described in this paper using Atlassian Jira and Confluence cloud deployments for some of our customers. At this time however the full functionality, including some configuration customisations and Marketplace apps, are not yet available for the cloud versions of the Atlassian toolset. The good news is that this is a quickly-evolving space, and **we expect to release updates** to our solution to address new aspects of cloud compatibility in the very near future.

Adaptavist SAFe® Solution for Atlassian tools overview

In this section, we'll dive into the practicalities of applying Atlassian tools and add-ons to solve the very real problems of globally-distributed teams, high stakes PI Planning events, and the confusion surrounding mixed and non-technical teams on agile release trains. This section will also include information about when an organisation should consider Jira Align as part of their solution.

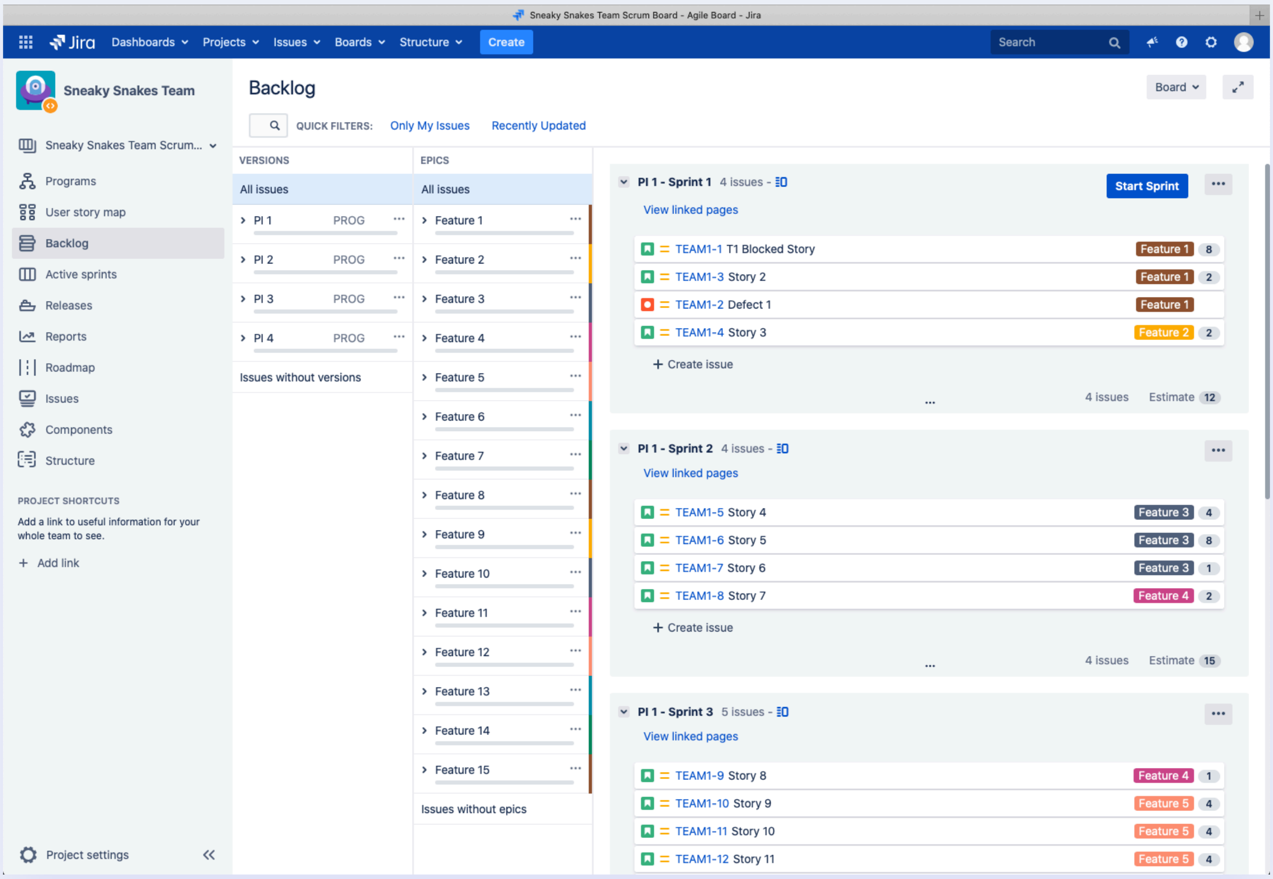
> **So, what does a flexible, pragmatic Atlassian tool solution for SAFe® look like?**

Teams manage their own backlogs with dedicated projects and boards

Each team, from development to business-focused, has their own Jira project and board, which enables them to have separate agile reports, velocity, and backlogs. It is also possible to have multiple teams share a single Jira project with discrete boards. This would be the recommended configuration if it's desirable to keep the SAFe® configuration consolidated within a single project.

Team projects can also permit variability in screens, custom fields, workflows, and boards, if teams desire this flexibility. Care should be taken to ensure that impacts to reporting on the underlying data will be understood.

Fig. 03: Team scrum board with Features and Program Increments from the SAFe® Program Project



PI 1 - Sprint 1 4 issues

TEAM1-1 T1 Blocked Story	Feature 1	8
TEAM1-3 Story 2	Feature 1	2
TEAM1-2 Defect 1	Feature 1	
TEAM1-4 Story 3	Feature 2	2

4 issues Estimate 12

PI 1 - Sprint 2 4 issues

TEAM1-5 Story 4	Feature 3	4
TEAM1-6 Story 5	Feature 3	8
TEAM1-7 Story 6	Feature 3	1
TEAM1-8 Story 7	Feature 4	2

4 issues Estimate 15

PI 1 - Sprint 3 5 issues

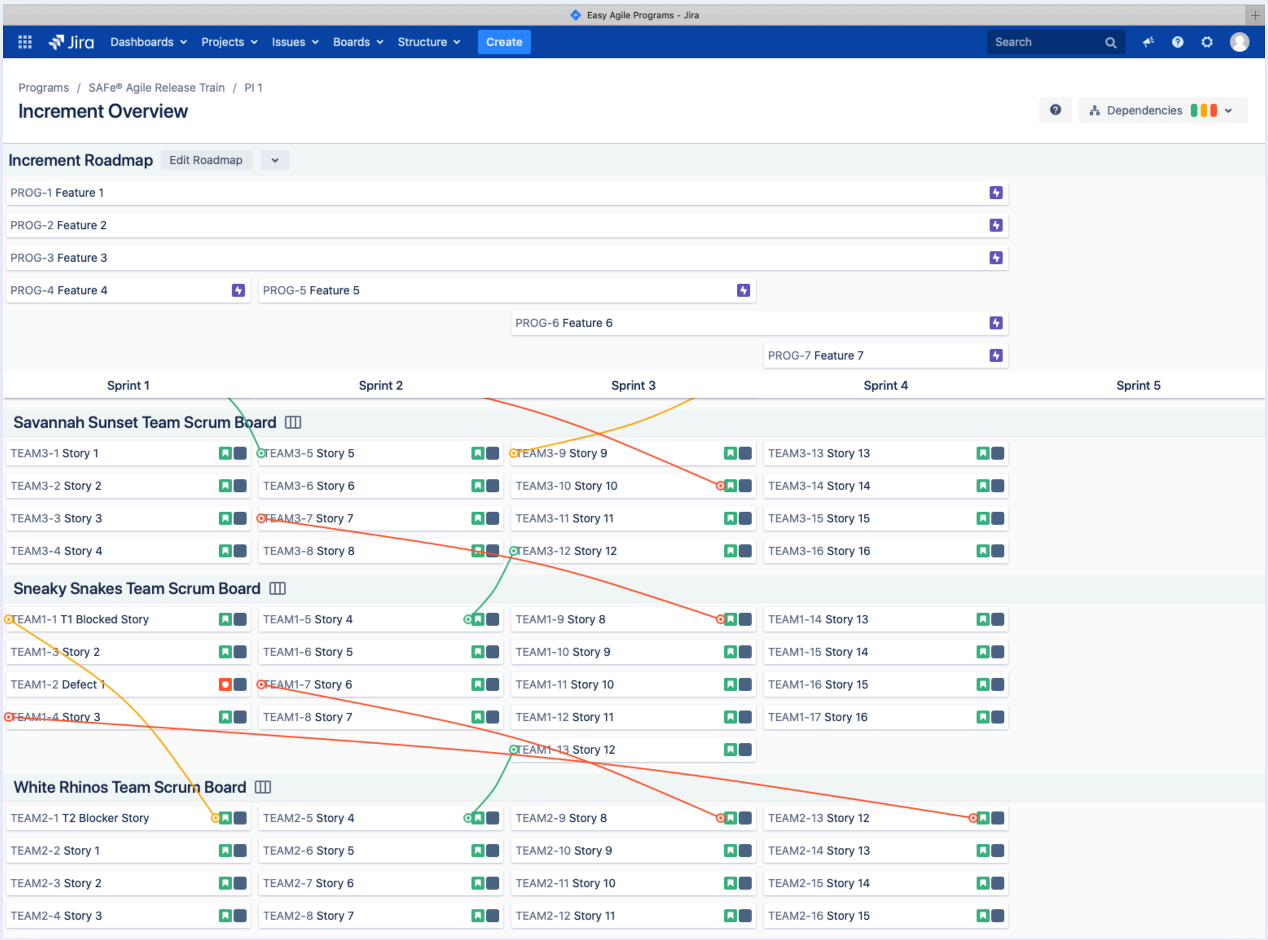
TEAM1-9 Story 8	Feature 4	1
TEAM1-10 Story 9	Feature 5	4
TEAM1-11 Story 10	Feature 5	4
TEAM1-12 Story 11	Feature 5	4

Visualising and managing inter-team dependencies

The Marketplace app Easy Agile Programs for Jira has a Board Increment Overview that's outstanding for visualising and managing dependencies between stories at the team level.

During PI planning, as teams populate their sprint backlogs, individuals can start to draw dependencies between stories in other teams' backlogs by clicking and dragging their stories. The application supports healthy/risky/unhealthy dependencies based on the source and target issues' assigned sprints, helping teams to order their work in such a way that dependencies are minimised.

Fig. 04: Easy Agile Programs offers an incredibly powerful and interactive interface for visualising and managing dependencies



Programs / SAFe® Agile Release Train / PI 1

Increment Overview

Increment Roadmap

PROG-1 Feature 1

PROG-2 Feature 2

PROG-3 Feature 3

PROG-4 Feature 4

PROG-5 Feature 5

PROG-6 Feature 6

PROG-7 Feature 7

Savannah Sunset Team Scrum Board

Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5
TEAM3-1 Story 1	TEAM3-5 Story 5	TEAM3-9 Story 9	TEAM3-13 Story 13	
TEAM3-2 Story 2	TEAM3-6 Story 6	TEAM3-10 Story 10	TEAM3-14 Story 14	
TEAM3-3 Story 3	TEAM3-7 Story 7	TEAM3-11 Story 11	TEAM3-15 Story 15	
TEAM3-4 Story 4	TEAM3-8 Story 8	TEAM3-12 Story 12	TEAM3-16 Story 16	

Sneaky Snakes Team Scrum Board

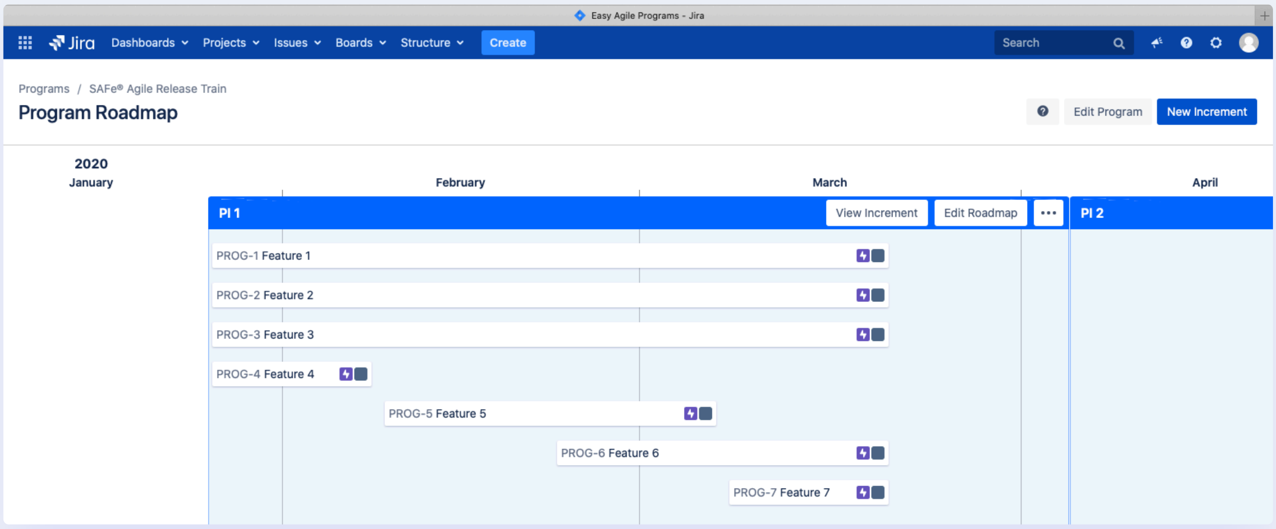
Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5
TEAM1-1 T1 Blocked Story	TEAM1-5 Story 4	TEAM1-9 Story 8	TEAM1-14 Story 13	
TEAM1-3 Story 2	TEAM1-6 Story 5	TEAM1-10 Story 9	TEAM1-15 Story 14	
TEAM1-2 Defect 1	TEAM1-7 Story 6	TEAM1-11 Story 10	TEAM1-16 Story 15	
TEAM1-4 Story 3	TEAM1-8 Story 7	TEAM1-12 Story 11	TEAM1-17 Story 16	
		TEAM1-13 Story 12		

White Rhinos Team Scrum Board

Sprint 1	Sprint 2	Sprint 3	Sprint 4	Sprint 5
TEAM2-1 T2 Blocker Story	TEAM2-5 Story 4	TEAM2-9 Story 8	TEAM2-13 Story 12	
TEAM2-2 Story 1	TEAM2-6 Story 5	TEAM2-10 Story 9	TEAM2-14 Story 13	
TEAM2-3 Story 2	TEAM2-7 Story 6	TEAM2-11 Story 10	TEAM2-15 Story 14	
TEAM2-4 Story 3	TEAM2-8 Story 7	TEAM2-12 Story 11	TEAM2-16 Story 15	

Easy Agile Programs' Roadmap View shows features across program increments. This is the primary working view for Release Train Engineers (RTEs) and Product Owners leading up to PI planning and also throughout the event.

Fig. 05: Easy Agile Programs Program Roadmap view shows features planned in a program increment



Programs / SAFe® Agile Release Train

Program Roadmap

PROG-1 Feature 1

PROG-2 Feature 2

PROG-3 Feature 3

PROG-4 Feature 4

PROG-5 Feature 5

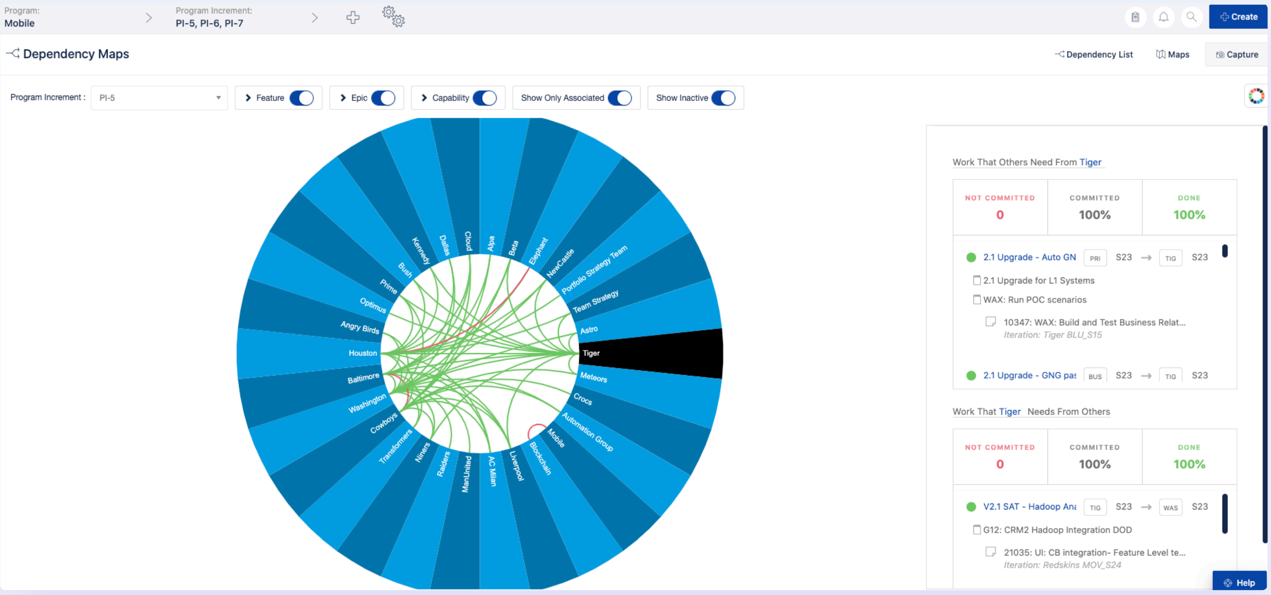
PROG-6 Feature 6

PROG-7 Feature 7

Consider Jira Align if…

Your development organisation contains 500 or more Jira Software users performing development or related IT functions (40-50 teams or 4+ ARTs), and multiple programs, along with a diverse set of product portfolios. Organisations with a diversified set of digital products that share the same technical infrastructure, or work frequently with external entities (hardware, logistics, and outsourced services), will find the reporting and analytical tools contained out-of-the-box with Jira Align useful and robust.

Fig. 06: Jira Align Dependency Map (wheel view) to identify and manage dependencies between large teams of teams



Work That Others Need From Tiger

NOT COMMITTED	COMMITTED	DONE
0	100%	100%

● 2.1 Upgrade - Auto GN PRI S23 → TIG S23

□ 2.1 Upgrade for L1 Systems

□ WAX: Run POC scenarios

10347: WAX: Build and Test Business Relat...
Iteration: Tiger BLU_S15

● 2.1 Upgrade - GNG pas BUS S23 → TIG S23

Work That Tiger Needs From Others

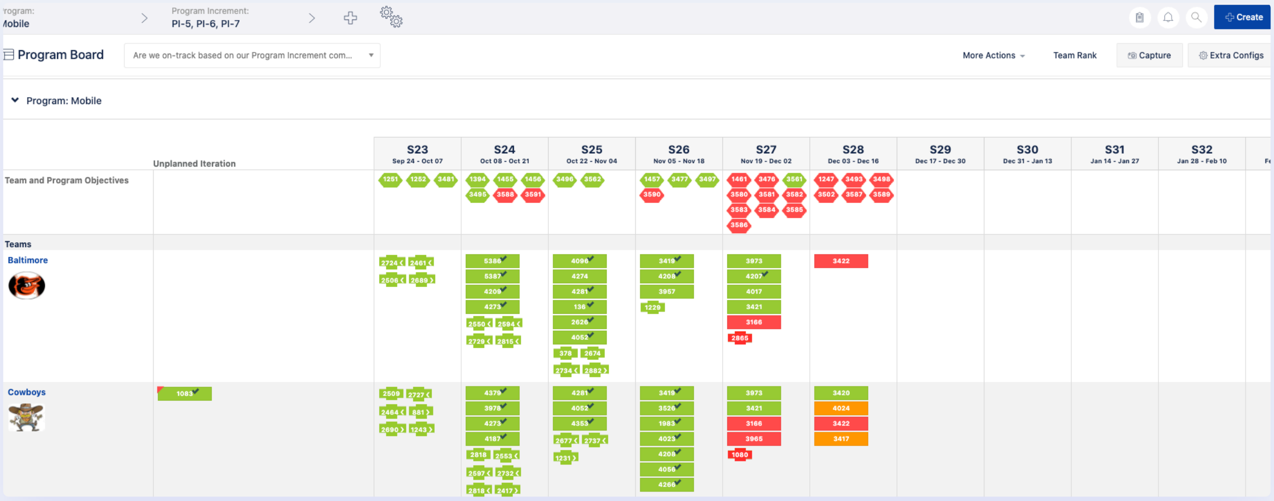
NOT COMMITTED	COMMITTED	DONE
0	100%	100%

● V2.1 SAT - Hadoop Ana TIG S23 → WAS S23

□ G12: CRM2 Hadoop Integration DOD

21035: UI: CB integration- Feature Level te...
Iteration: Redskins MOV_S24

Fig. 07: Jira Align Program Board to show planned work and delivery objectives by program increment/quarter



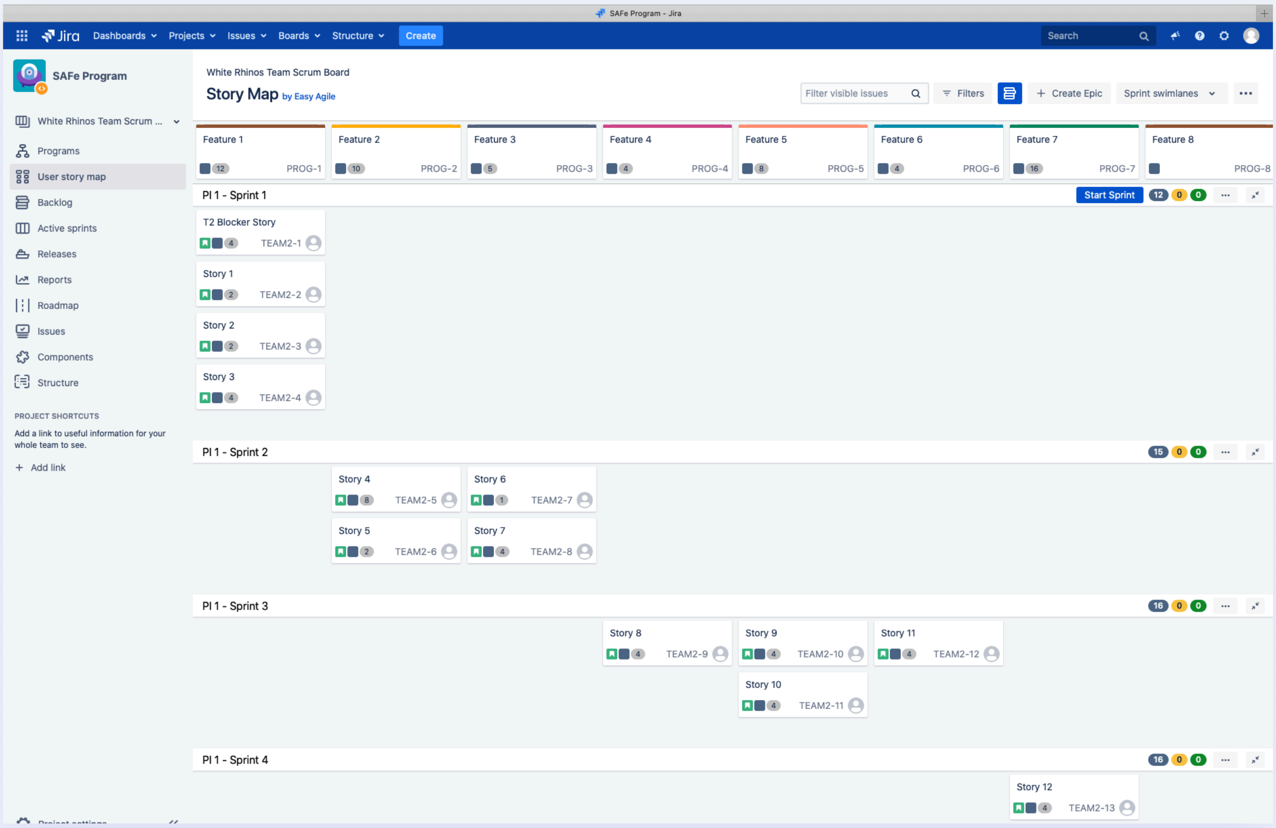
Program: Mobile

	Unplanned Iteration	S23 Sep 24 - Oct 07	S24 Oct 08 - Oct 21	S25 Oct 22 - Nov 04	S26 Nov 05 - Nov 18	S27 Nov 19 - Dec 02	S28 Dec 03 - Dec 16	S29 Dec 17 - Dec 30	S30 Dec 31 - Jan 13	S31 Jan 14 - Jan 27	S32 Jan 28 - Feb 10	Fe
Team and Program Objectives		1251 1252 3481	1394 1455 1456 3495 3588 3591	3496 3562	1457 3477 3497 3590	1461 3476 3561 3580 3581 3582 3583 3584 3585 3586	1247 3493 3498 3502 3587 3589					
Teams												
Baltimore		2724 2461 2506 2689	5386 5387 4209 4273 2550 2594 2729 2815	4096 4274 4281 136 2626 4052 378 2674 2734 2882	3419 4208 3957 1229	3973 4207 4017 3421 3166 2865	3422					
Cowboys	1083	2509 2727 2464 881 2690 1243	4379 3978 4273 4187 2818 2553 2597 2732 2818 2417	4281 4052 4353 2677 2737 1231	3419 3526 1983 4023 4208 4056 4266	3973 3421 3166 3965 1080	3420 4024 3422 3417					

Product owners and product management manage the program backlog with a dedicated project and board

SAFe® programs or agile release trains (ARTs) get their own dedicated project and board in Jira. The project's workflow is based on solution kanban, and can be modified to suit any organisation's desired process for features. We employ two more Easy Agile apps, User Story Maps, and Roadmaps, to assist as shown.

Fig. 08: Easy Agile User Story Maps shows stories by sprint by feature



Add a link to useful information for your whole team to see.

	Feature 1	Feature 2	Feature 3	Feature 4	Feature 5	Feature 6	Feature 7	Feature 8
	12 PROG-1	10 PROG-2	5 PROG-3	4 PROG-4	8 PROG-5	4 PROG-6	16 PROG-7	PROG-8
PI 1 - Sprint 1 Start Sprint 12 0 0	T2 Blocker Story 4 TEAM2-1 Story 1 2 TEAM2-2 Story 2 2 TEAM2-3 Story 3 4 TEAM2-4							
PI 1 - Sprint 2 15 0 0		Story 4 8 TEAM2-5 Story 5 2 TEAM2-6	Story 6 1 TEAM2-7 Story 7 4 TEAM2-8					
PI 1 - Sprint 3 16 0 0				Story 8 4 TEAM2-9	Story 9 4 TEAM2-10 Story 10 4 TEAM2-11	Story 11 4 TEAM2-12		
PI 1 - Sprint 4 16 0 0							Story 12 4 TEAM2-13	

Fig. 09: Easy Agile Roadmaps shows features over time

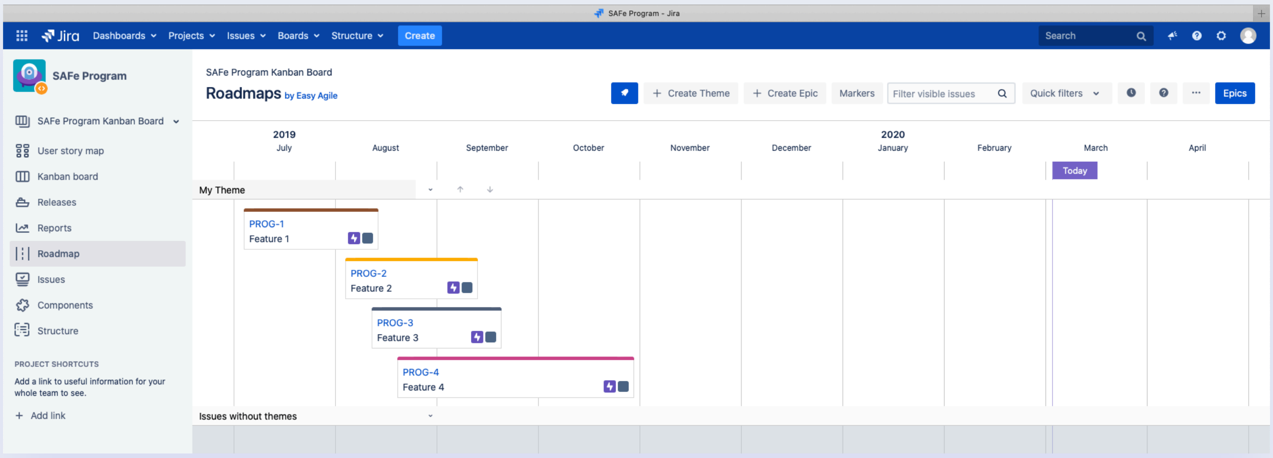
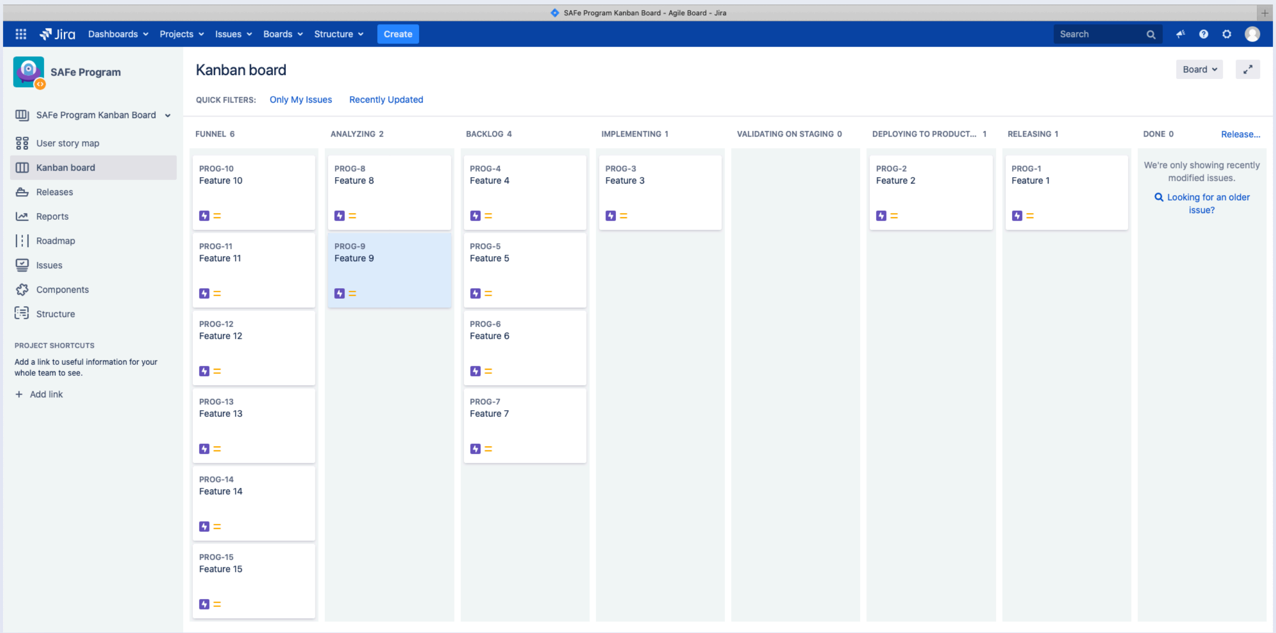


Fig. 10: Jira Software kanban boards provide visual drag-and-drop controls over features

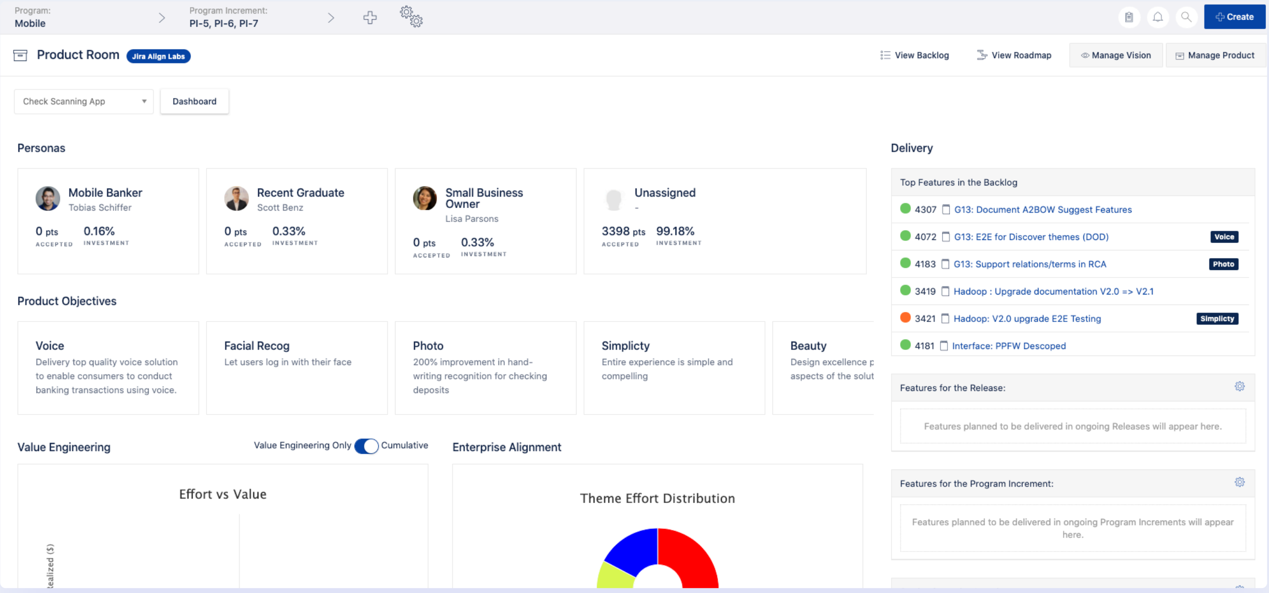


FUNNEL 6	ANALYZING 2	BACKLOG 4	IMPLEMENTING 1	VALIDATING ON STAGING 0	DEPLOYING TO PRODUCT... 1	RELEASING 1	DONE 0
PROG-10 Feature 10	PROG-8 Feature 8	PROG-4 Feature 4	PROG-3 Feature 3		PROG-2 Feature 2	PROG-1 Feature 1	We're only showing recently modified issues. Looking for an older issue?
PROG-11 Feature 11	PROG-9 Feature 9	PROG-5 Feature 5					
PROG-12 Feature 12		PROG-6 Feature 6					
PROG-13 Feature 13		PROG-7 Feature 7					
PROG-14 Feature 14							
PROG-15 Feature 15							

Consider Jira Align if…

your teams are organised around products and require deeper capabilities for effective product management tooling—such as managing multiple integrated product lines with heavy dependencies, managing personas, and managing overall product investment.

Fig. 11: Jira Align Product Room to manage multiple products, personas, and investment types



Program: Mobile

Program Increment: PI-5, PI-6, PI-7

Create

Product Room Jira Align Labs

View Backlog | View Roadmap | Manage Vision | Manage Product

Check Scanning App | Dashboard

Personas

- Mobile Banker, Tobias Schiffer: 0 pts ACCEPTED, 0.16% INVESTMENT
- Recent Graduate, Scott Benz: 0 pts ACCEPTED, 0.33% INVESTMENT
- Small Business Owner, Lisa Parsons: 0 pts ACCEPTED, 0.33% INVESTMENT
- Unassigned, -: 3398 pts ACCEPTED, 99.18% INVESTMENT

Product Objectives

- Voice: Delivery top quality voice solution to enable consumers to conduct banking transactions using voice.
- Facial Recog: Let users log in with their face
- Photo: 200% improvement in hand-writing recognition for checking deposits
- Simplicty: Entire experience is simple and compelling
- Beauty: Design excellence p aspects of the solut

Value Engineering

Value Engineering Only | Cumulative

Enterprise Alignment

Delivery

Top Features in the Backlog

4307	G13: Document A2BOW Suggest Features	
4072	G13: E2E for Discover themes (DOD)	Voice
4183	G13: Support relations/terms in RCA	Photo
3419	Hadoop : Upgrade documentation V2.0 => V2.1	
3421	Hadoop: V2.0 upgrade E2E Testing	Simplicty
4181	Interface: PPFW Descoped	

Features for the Release:

Features planned to be delivered in ongoing Releases will appear here.

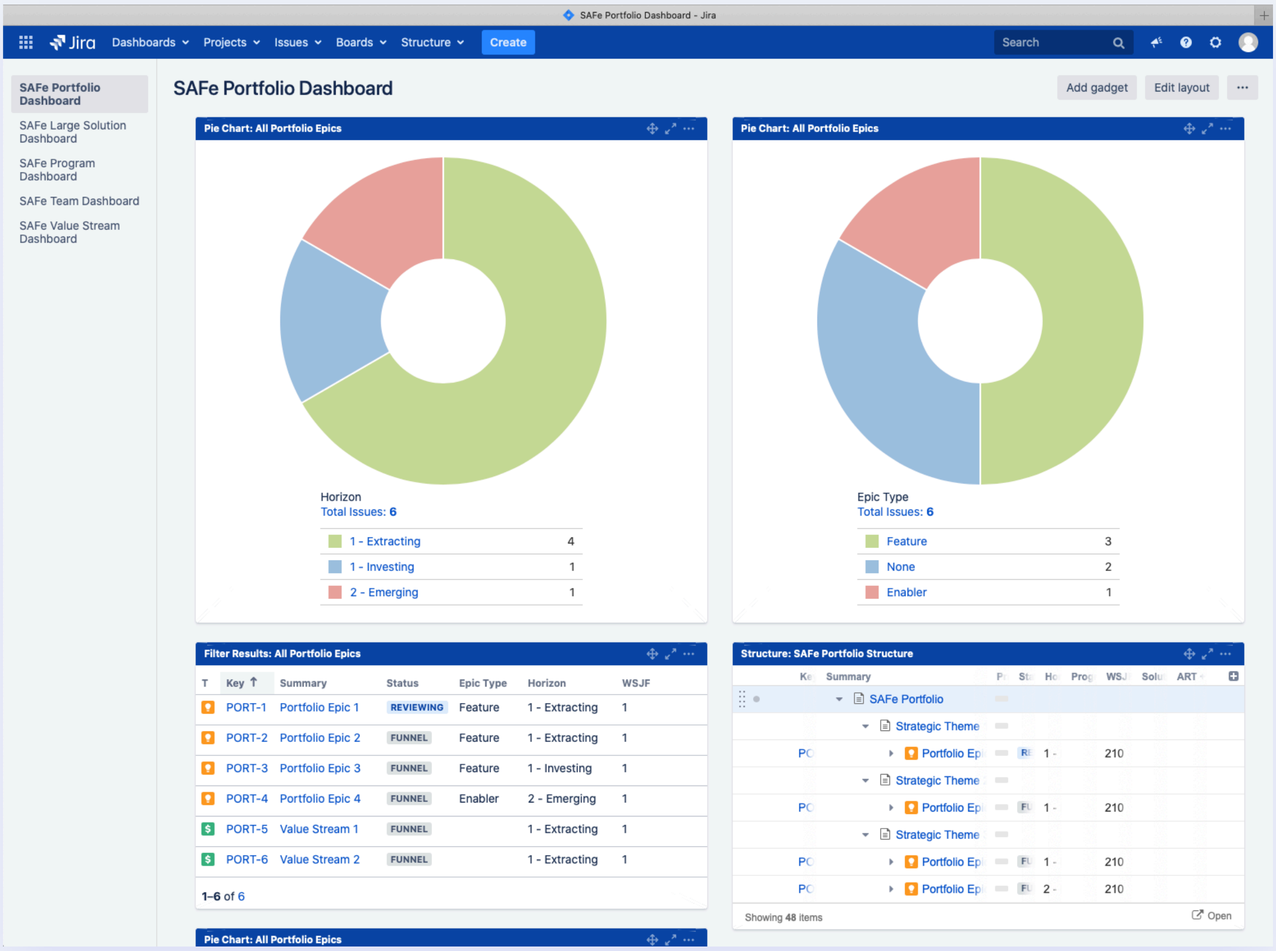
Features for the Program Increment:

Features planned to be delivered in ongoing Program Increments will appear here.

Dedicated Large Solution and Portfolio projects and boards

Large Solution backlogs also get dedicated projects and boards in Jira. Like the Program level, the project's workflow is based on solution kanban and can be modified to suit any organisation's desired process for capabilities.

Fig. 12: Jira dashboards and out-of-the-box gadgets surface vital Portfolio information in a convenient setting


SAFe Portfolio Dashboard - Jira
Jira
Dashboards
Projects
Issues
Boards
Structure
Create
Search
SAFe Portfolio Dashboard
SAFe Large Solution Dashboard
SAFe Program Dashboard
SAFe Team Dashboard
SAFe Value Stream Dashboard
Add gadget
Edit layout
Pie Chart: All Portfolio Epics
Pie Chart: All Portfolio Epics
Filter Results: All Portfolio Epics
Structure: SAFe Portfolio Structure
Pie Chart: All Portfolio Epics

SAFe Portfolio Dashboard

Horizon
Total Issues: 6

🟩 1 - Extracting	4
🟦 1 - Investing	1
🟥 2 - Emerging	1

Epic Type
Total Issues: 6

🟩 Feature	3
🟦 None	2
🟥 Enabler	1

T	Key ↑	Summary	Status	Epic Type	Horizon	WSJF
💡	PORT-1	Portfolio Epic 1	REVIEWING	Feature	1 - Extracting	1
💡	PORT-2	Portfolio Epic 2	FUNNEL	Feature	1 - Extracting	1
💡	PORT-3	Portfolio Epic 3	FUNNEL	Feature	1 - Investing	1
💡	PORT-4	Portfolio Epic 4	FUNNEL	Enabler	2 - Emerging	1
$	PORT-5	Value Stream 1	FUNNEL		1 - Extracting	1
$	PORT-6	Value Stream 2	FUNNEL		1 - Extracting	1

1–6 of 6

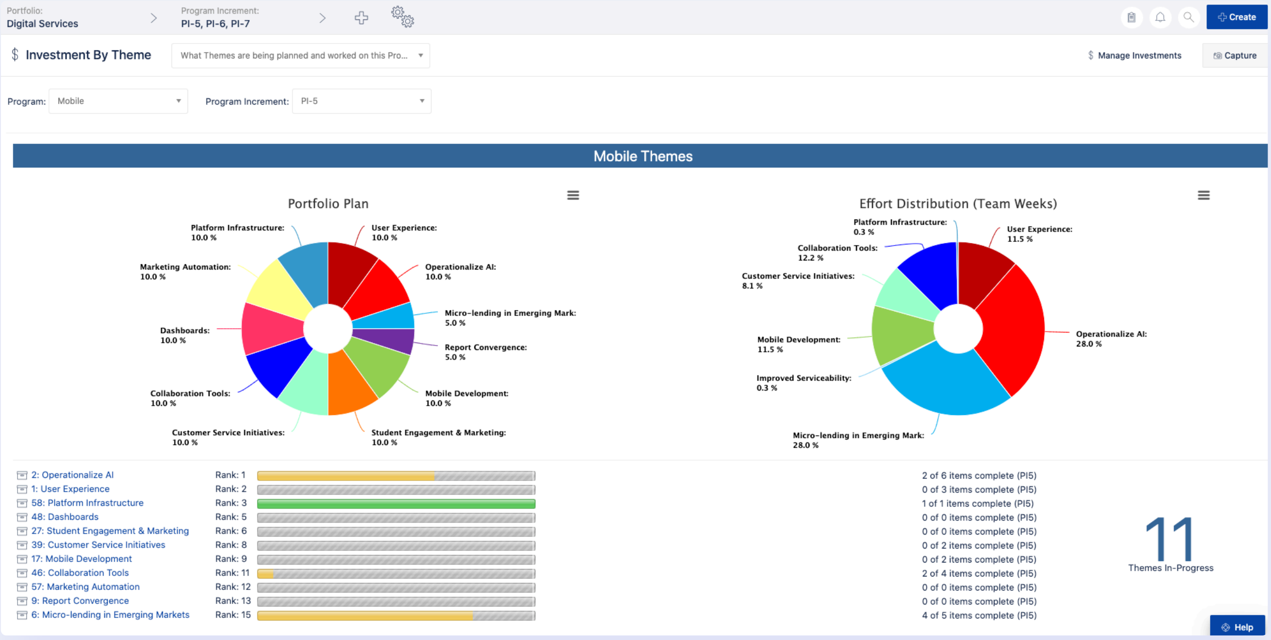
Ke	Summary	P	Sta	Ho	Prog	WSJ	Solu	ART
	SAFe Portfolio							
	Strategic Theme							
PC	Portfolio Ep		RE	1 -		210		
	Strategic Theme							
PC	Portfolio Ep		FU	1 -		210		
	Strategic Theme							
PC	Portfolio Ep		FU	1 -		210		
PC	Portfolio Ep		FU	2 -		210		

Showing 48 items
Open

Consider Jira Align if…

your organisation has multiple Large Solutions or Portfolios. Organisations that undergo mergers and acquisitions, or multiple lines of business where management is delegated or outsourced, will find value in the flexibility to separately track multiple organisations within a holdings or umbrella company.

Fig. 13: Jira Align Investment by Theme Report tracks progress on business objectives by multiple portfolios and across a diverse set of products


Create
Manage Investments
Capture
Help

Portfolio: Digital Services

Program Increment: PI-5, PI-6, PI-7

$ Investment By Theme

What Themes are being planned and worked on this Pro...

Program: Mobile

Program Increment: PI-5

Mobile Themes

Portfolio Plan
Platform Infrastructure: 10.0 %
User Experience: 10.0 %
Marketing Automation: 10.0 %
Operationalize AI: 10.0 %
Micro-lending in Emerging Mark: 5.0 %
Dashboards: 10.0 %
Report Convergence: 5.0 %
Collaboration Tools: 10.0 %
Mobile Development: 10.0 %
Customer Service Initiatives: 10.0 %
Student Engagement & Marketing: 10.0 %
Effort Distribution (Team Weeks)
Platform Infrastructure: 0.3 %
User Experience: 11.5 %
Collaboration Tools: 12.2 %
Customer Service Initiatives: 8.1 %
Operationalize AI: 28.0 %
Mobile Development: 11.5 %
Improved Serviceability: 0.3 %
Micro-lending in Emerging Mark: 28.0 %

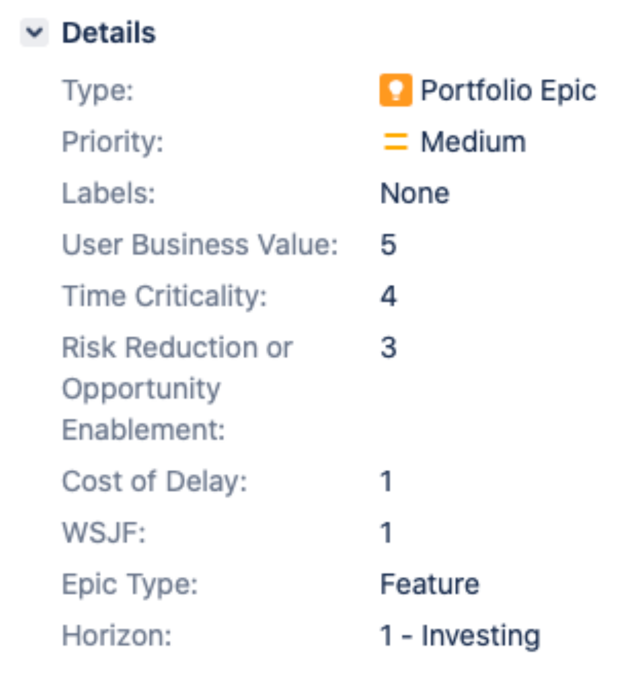
2: Operationalize AI	Rank: 1	2 of 6 items complete (PI5)
1: User Experience	Rank: 2	0 of 3 items complete (PI5)
58: Platform Infrastructure	Rank: 3	1 of 1 items complete (PI5)
48: Dashboards	Rank: 5	0 of 0 items complete (PI5)
27: Student Engagement & Marketing	Rank: 6	0 of 0 items complete (PI5)
39: Customer Service Initiatives	Rank: 8	0 of 2 items complete (PI5)
17: Mobile Development	Rank: 9	0 of 2 items complete (PI5)
46: Collaboration Tools	Rank: 11	2 of 4 items complete (PI5)
57: Marketing Automation	Rank: 12	0 of 0 items complete (PI5)
9: Report Convergence	Rank: 13	0 of 0 items complete (PI5)
6: Micro-lending in Emerging Markets	Rank: 15	4 of 5 items complete (PI5)

11
Themes In-Progress

ScriptRunner for Jira provides powerful scripted field and automation functions

The ScriptRunner for Jira app by our team at Adaptavist provides the ability to calculate field values dynamically, such as cost of delay and WSJF for Portfolio epics. ScriptRunner also provides essential automation, built-in scripts, and project template functionality that enable the scaling of Jira's configuration for large enterprises.

Fig. 14 Adaptavist ScriptRunner for Jira provides powerful scripted field capabilities, enabling the use of dynamic fields



Details

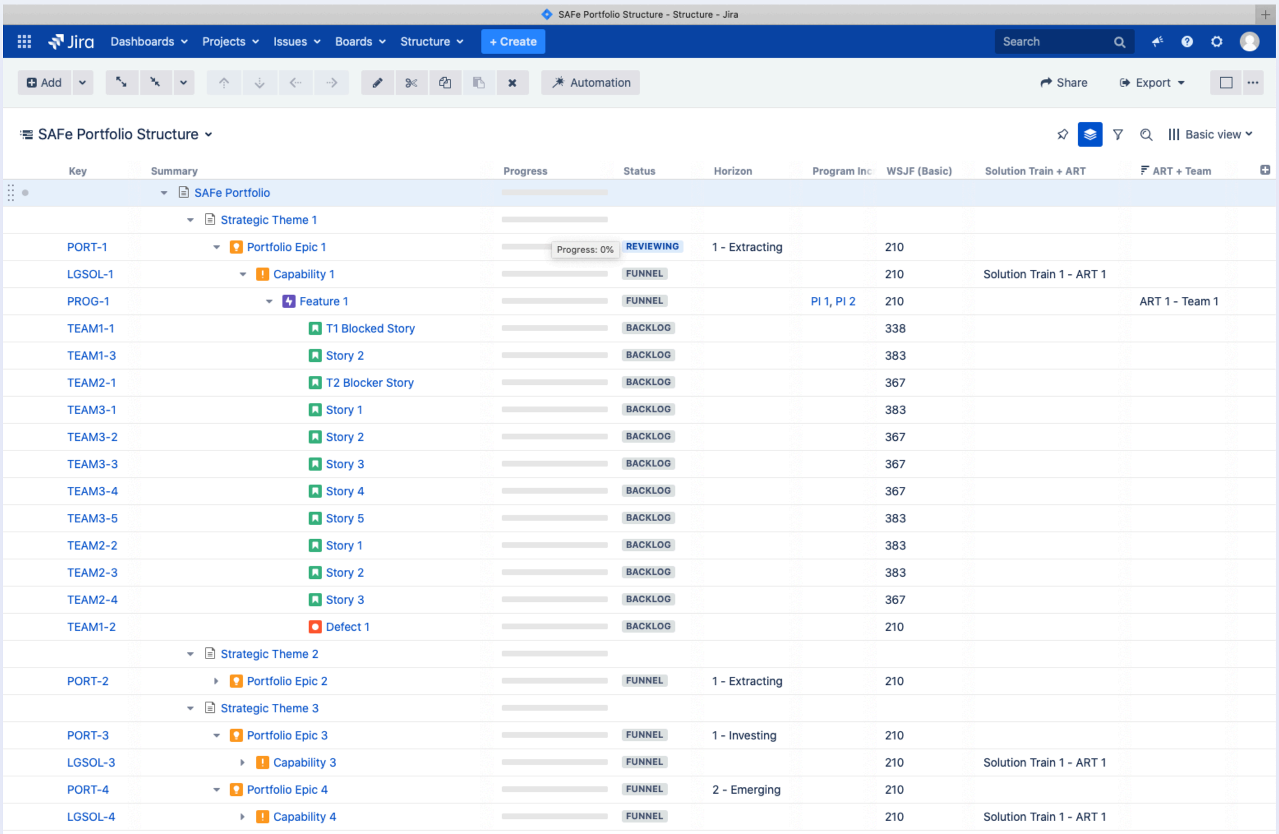
Type:	Portfolio Epic
Priority:	= Medium
Labels:	None
User Business Value:	5
Time Criticality:	4
Risk Reduction or Opportunity Enablement:	3
Cost of Delay:	1
WSJF:	1
Epic Type:	Feature
Horizon:	1 - Investing

ALM Works Structure provides multiple hierarchical drill-down/roll-up views of your portfolio, program increment, product releases, and more

The Structure app by ALM Works can provide a roll-up/drill-down, hierarchical view of any data in the Jira instance—a truly powerful application. In this case, Structure can be relied upon to deliver essential views of Jira's underlying data in a SAFe® Portfolio, Large Solution, or Program. Some examples include the ability to show features by program increment, stories by team by feature by epic, defects by sprint by product component, and so on.

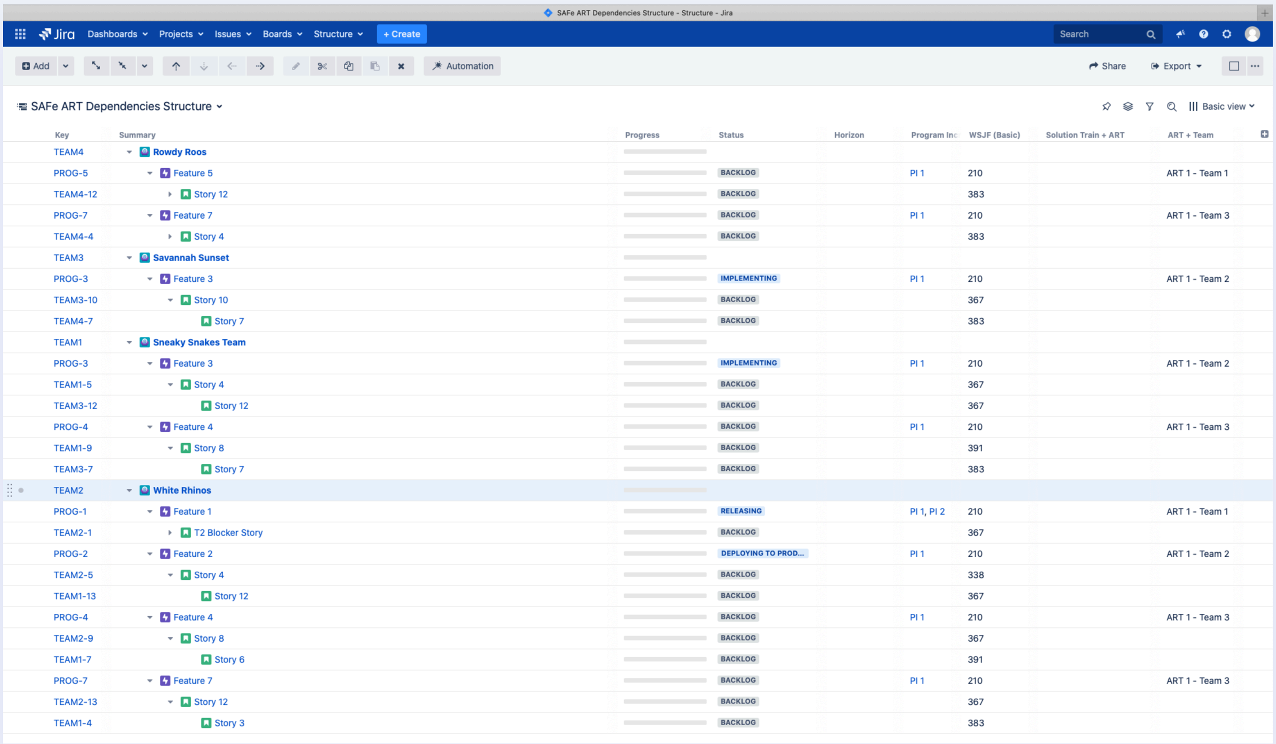
The Portfolio Rollup Structure below is one example of the many possible ways the application can be used to aid in the visualisation of data in Jira. Columns can also be configured to display different field values, enabling further customisation.

Fig. 15: ALM Works Structure provides a top-down view of the entire portfolio, broken down logically by epic, capability, feature, and story



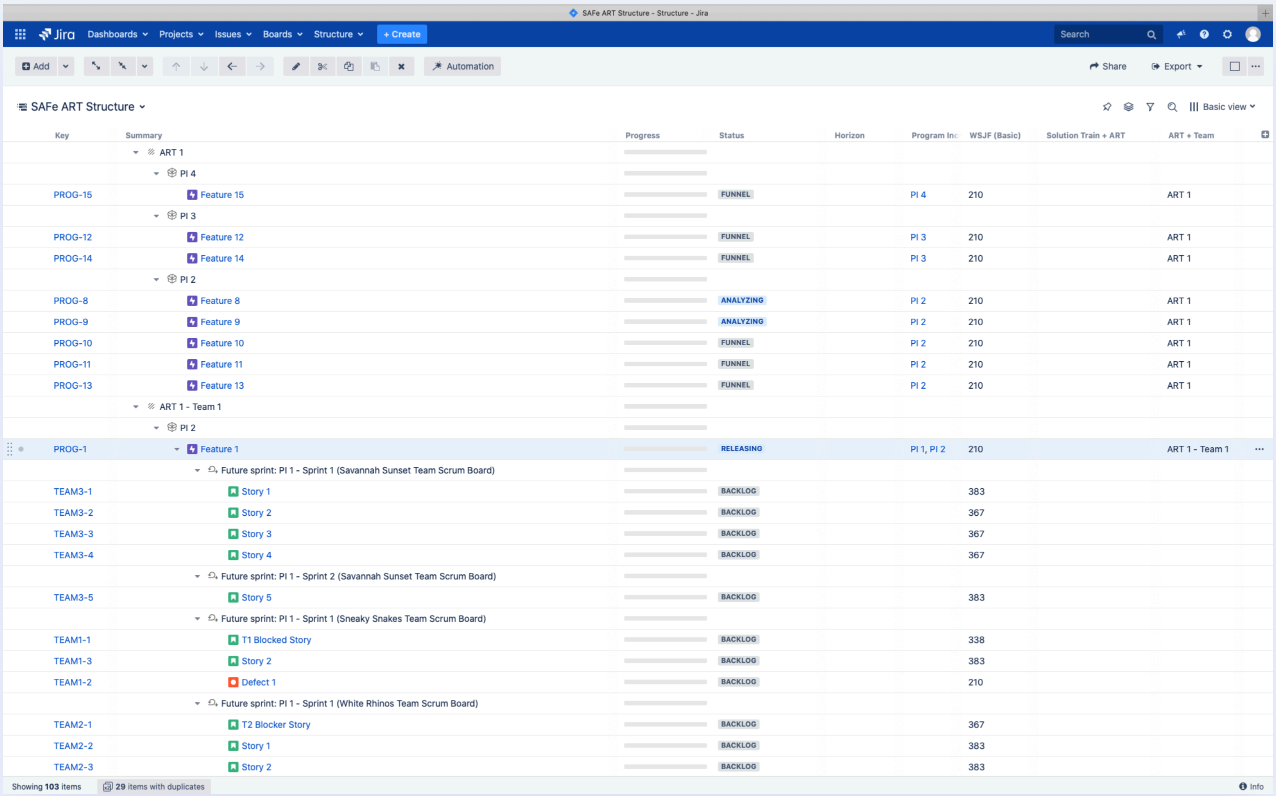
Key	Summary	Progress	Status	Horizon	Program Inc	WSJF (Basic)	Solution Train + ART	ART + Team
	SAFe Portfolio							
	Strategic Theme 1							
PORT-1	Portfolio Epic 1	Progress: 0%	REVIEWING	1 - Extracting		210		
LGSOL-1	Capability 1		FUNNEL			210	Solution Train 1 - ART 1	
PROG-1	Feature 1		FUNNEL		PI 1, PI 2	210		ART 1 - Team 1
TEAM1-1	T1 Blocked Story		BACKLOG			338		
TEAM1-3	Story 2		BACKLOG			383		
TEAM2-1	T2 Blocker Story		BACKLOG			367		
TEAM3-1	Story 1		BACKLOG			383		
TEAM3-2	Story 2		BACKLOG			367		
TEAM3-3	Story 3		BACKLOG			367		
TEAM3-4	Story 4		BACKLOG			367		
TEAM3-5	Story 5		BACKLOG			383		
TEAM2-2	Story 1		BACKLOG			383		
TEAM2-3	Story 2		BACKLOG			383		
TEAM2-4	Story 3		BACKLOG			367		
TEAM1-2	Defect 1		BACKLOG			210		
	Strategic Theme 2							
PORT-2	Portfolio Epic 2		FUNNEL	1 - Extracting		210		
	Strategic Theme 3							
PORT-3	Portfolio Epic 3		FUNNEL	1 - Investing		210		
LGSOL-3	Capability 3		FUNNEL			210	Solution Train 1 - ART 1	
PORT-4	Portfolio Epic 4		FUNNEL	2 - Emerging		210		
LGSOL-4	Capability 4		FUNNEL			210	Solution Train 1 - ART 1	

Fig. 16: Structures can be created to assemble dynamic lists, such as story dependencies, enabling scrum masters to manage inter-team collaboration



Key	Summary	Progress	Status	Horizon	Program Inc	WSJF (Basic)	Solution Train + ART	ART + Team
TEAM4	Rowdy Roos							
PROG-5	Feature 5		BACKLOG		PI 1	210		ART 1 - Team 1
TEAM4-12	Story 12		BACKLOG			383		
PROG-7	Feature 7		BACKLOG		PI 1	210		ART 1 - Team 3
TEAM4-4	Story 4		BACKLOG			383		
TEAM3	Savannah Sunset							
PROG-3	Feature 3		IMPLEMENTING		PI 1	210		ART 1 - Team 2
TEAM3-10	Story 10		BACKLOG			367		
TEAM4-7	Story 7		BACKLOG			383		
TEAM1	Sneaky Snakes Team							
PROG-3	Feature 3		IMPLEMENTING		PI 1	210		ART 1 - Team 2
TEAM1-5	Story 4		BACKLOG			367		
TEAM3-12	Story 12		BACKLOG			367		
PROG-4	Feature 4		BACKLOG		PI 1	210		ART 1 - Team 3
TEAM1-9	Story 8		BACKLOG			391		
TEAM3-7	Story 7		BACKLOG			383		
TEAM2	White Rhinos							
PROG-1	Feature 1		RELEASING		PI 1, PI 2	210		ART 1 - Team 1
TEAM2-1	T2 Blocker Story		BACKLOG			367		
PROG-2	Feature 2		DEPLOYING TO PROD...		PI 1	210		ART 1 - Team 2
TEAM2-5	Story 4		BACKLOG			338		
TEAM1-13	Story 12		BACKLOG			367		
PROG-4	Feature 4		BACKLOG		PI 1	210		ART 1 - Team 3
TEAM2-9	Story 8		BACKLOG			367		
TEAM1-7	Story 6		BACKLOG			391		
PROG-7	Feature 7		BACKLOG		PI 1	210		ART 1 - Team 3
TEAM2-13	Story 12		BACKLOG			367		
TEAM1-4	Story 3		BACKLOG			383		

Fig. 17: Another application of Structure is to conflate scope and schedule views, as shown in this example where we see stories by sprint by feature by program increment by team by ART



Key	Summary	Progress	Status	Horizon	Program Inc	WSJF (Basic)	Solution Train + ART	ART + Team
	ART 1							
	PI 4							
PROG-15	Feature 15		FUNNEL		PI 4	210		ART 1
	PI 3							
PROG-12	Feature 12		FUNNEL		PI 3	210		ART 1
PROG-14	Feature 14		FUNNEL		PI 3	210		ART 1
	PI 2							
PROG-8	Feature 8		ANALYZING		PI 2	210		ART 1
PROG-9	Feature 9		ANALYZING		PI 2	210		ART 1
PROG-10	Feature 10		FUNNEL		PI 2	210		ART 1
PROG-11	Feature 11		FUNNEL		PI 2	210		ART 1
PROG-13	Feature 13		FUNNEL		PI 2	210		ART 1
	ART 1 - Team 1							
	PI 2							
PROG-1	Feature 1		RELEASING		PI 1, PI 2	210		ART 1 - Team 1
	Future sprint: PI 1 - Sprint 1 (Savannah Sunset Team Scrum Board)							
TEAM3-1	Story 1		BACKLOG			383		
TEAM3-2	Story 2		BACKLOG			367		
TEAM3-3	Story 3		BACKLOG			367		
TEAM3-4	Story 4		BACKLOG			367		
	Future sprint: PI 1 - Sprint 2 (Savannah Sunset Team Scrum Board)							
TEAM3-5	Story 5		BACKLOG			383		
	Future sprint: PI 1 - Sprint 1 (Sneaky Snakes Team Scrum Board)							
TEAM1-1	T1 Blocked Story		BACKLOG			338		
TEAM1-3	Story 2		BACKLOG			383		
TEAM1-2	Defect 1		BACKLOG			210		
	Future sprint: PI 1 - Sprint 1 (White Rhinos Team Scrum Board)							
TEAM2-1	T2 Blocker Story		BACKLOG			367		
TEAM2-2	Story 1		BACKLOG			383		
TEAM2-3	Story 2		BACKLOG			383		

Showing **103** items

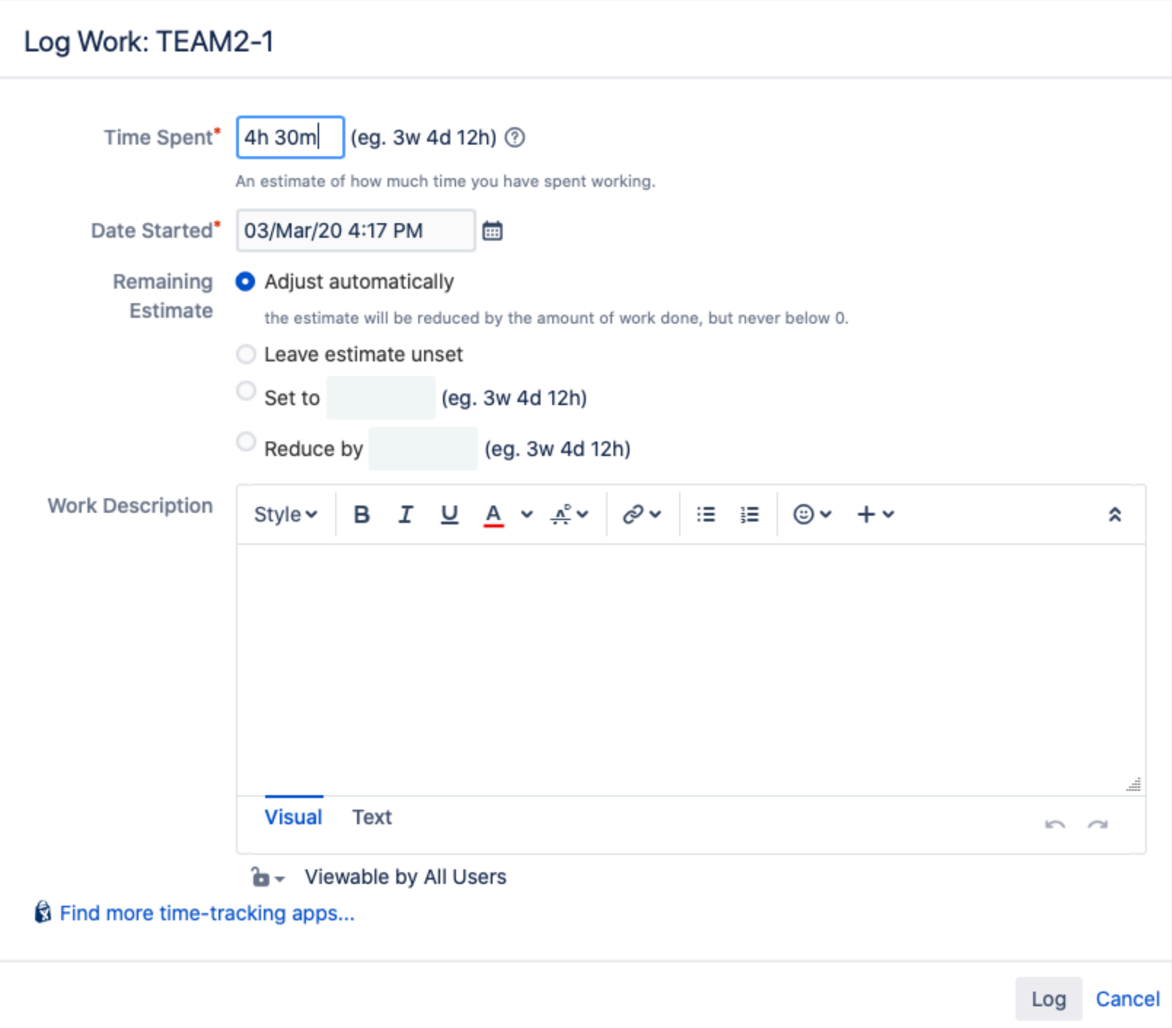
29 items with duplicates

Info

Track effort against stories, tasks, or defects

For organisations that capitalise research and development, effort can be logged against Jira issues, enabling organisations to associate costs with development effort.

Fig. 18: Jira provides out-of-the-box time tracking, enabling the logging of effort against stories, defects, tasks, and more



Log Work: TEAM2-1

Time Spent*: 4h 30m (eg. 3w 4d 12h)

An estimate of how much time you have spent working.

Date Started*: 03/Mar/20 4:17 PM

Remaining Estimate:

● Adjust automatically

the estimate will be reduced by the amount of work done, but never below 0.

○ Leave estimate unset

○ Set to (eg. 3w 4d 12h)

○ Reduce by (eg. 3w 4d 12h)

Work Description

Viewable by All Users

Process improvement through data-driven recommendations

By leveraging Jira's data in retrospectives, teams can learn about their quality, consistency, velocity, and more.

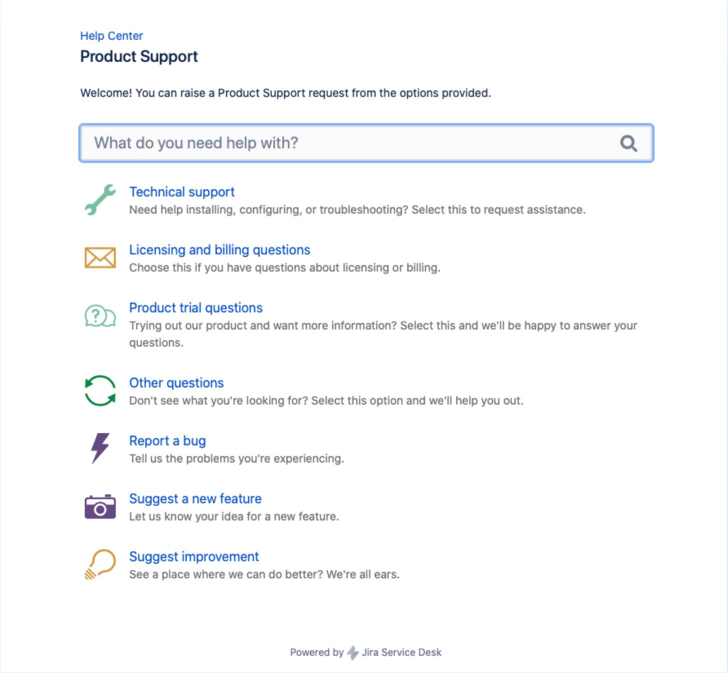
Jira Service Desk aligns request intake and product management from idea-to-backlog-to-build-to-ship

With Jira Service Desk, customers can be guided through the process of making requests of any type, helping you and your teams to focus on delivering software.

Common examples of feature requests and reporting defects can be modelled easily with Jira Service Desk, providing a seamless interface between your customers and product management.

Requests can be vetted and converted into stories or defects that get slotted right into any team's backlog. These issues can be linked to the original requests, providing the customer with full transparency.

Fig. 19: The Jira Service Desk customer portal shows a set of configured request groupings to guide users to the right spot



Help Center

Product Support

Welcome! You can raise a Product Support request from the options provided.

What do you need help with?

Technical support
Need help installing, configuring, or troubleshooting? Select this to request assistance.

Licensing and billing questions
Choose this if you have questions about licensing or billing.

Product trial questions
Trying out our product and want more information? Select this and we'll be happy to answer your questions.

Other questions
Don't see what you're looking for? Select this option and we'll help you out.

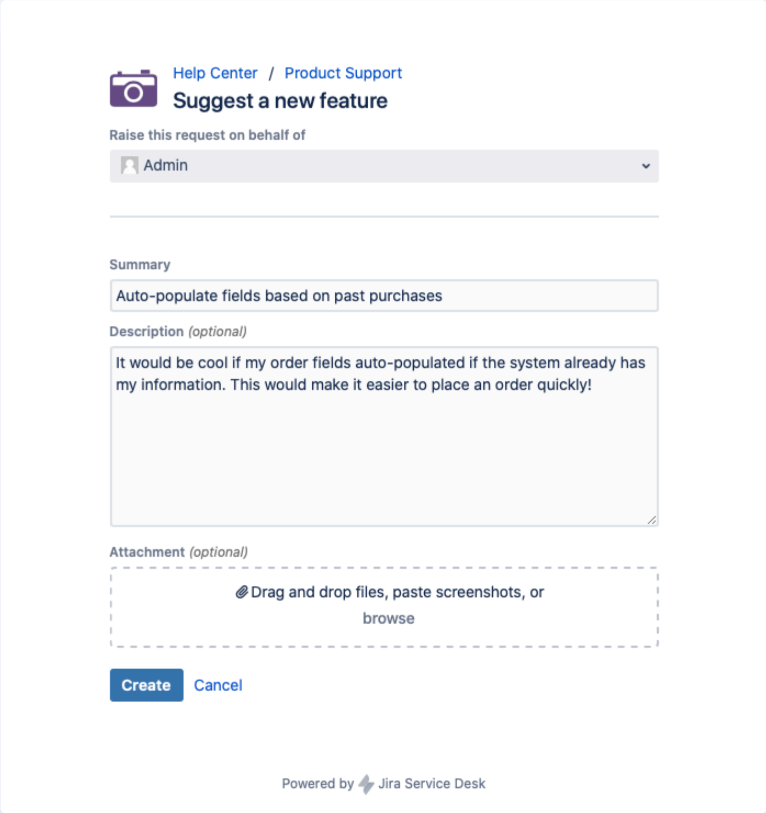
Report a bug
Tell us the problems you're experiencing.

Suggest a new feature
Let us know your idea for a new feature.

Suggest improvement
See a place where we can do better? We're all ears.

Powered by Jira Service Desk

Fig. 20: Request fields can be thoroughly customised—names, descriptions, and required values are all available options



Help Center / Product Support

Suggest a new feature

Raise this request on behalf of

Admin

Summary

Auto-populate fields based on past purchases

Description *(optional)*

It would be cool if my order fields auto-populated if the system already has my information. This would make it easier to place an order quickly!

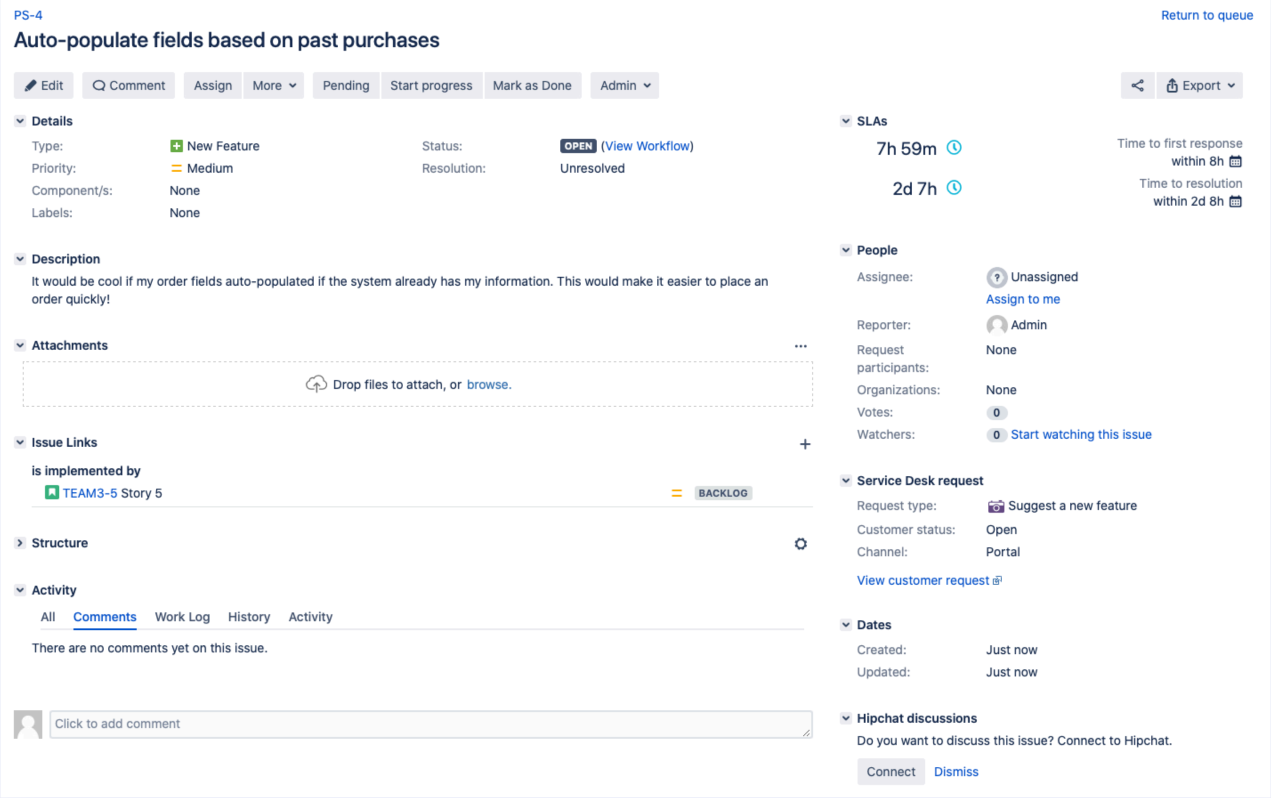
Attachment *(optional)*

Drag and drop files, paste screenshots, or browse

Create Cancel

Powered by Jira Service Desk

Fig. 21: Link original requests directly to implementation stories to enable full, end-to-end traceability that keeps your customers in the loop and happy



PS-4

Return to queue

Auto-populate fields based on past purchases

Edit | Comment | Assign | More | Pending | Start progress | Mark as Done | Admin | Export

Details

Type:	New Feature	Status:	OPEN (View Workflow)
Priority:	Medium	Resolution:	Unresolved
Component/s:	None		
Labels:	None		

Description

It would be cool if my order fields auto-populated if the system already has my information. This would make it easier to place an order quickly!

Attachments

Drop files to attach, or browse.

Issue Links

is implemented by

TEAM3-5 Story 5 BACKLOG

Structure

Activity

All | Comments | Work Log | History | Activity

There are no comments yet on this issue.

Click to add comment

SLAs

7h 59m Time to first response within 8h

2d 7h Time to resolution within 2d 8h

People

Assignee:	Unassigned Assign to me
Reporter:	Admin
Request participants:	None
Organizations:	None
Votes:	0
Watchers:	0 Start watching this issue

Service Desk request

Request type:	Suggest a new feature
Customer status:	Open
Channel:	Portal

View customer request

Dates

Created:	Just now
Updated:	Just now

Hipchat discussions

Do you want to discuss this issue? Connect to Hipchat.

Connect Dismiss

Solution configuration prerequisites

While it's possible for any organisation to simply dive in and implement the configuration that follows with a Jira Software instance, the benefits won't truly be realised unless the business is already doing a few particular things well.

The number of people involved and amount of coordination involved in the use of development and collaboration tools when organisations begin to scale agile is hugely challenging. Bringing teams together for the first time to work collaboratively as part of an ART is difficult in practice because it will require changes to tool configurations, build and test processes, reporting requirements, and ceremonies. And this is not to mention the cultural challenges around forming teams of people who have not yet built trusting relationships with one another.

Thus, we strongly suggest that all organisations ensure they have adequate SAFe® and Atlassian expertise, either in-house or contracted, along with team level operational excellence, and leadership buy-in and participation. With all of these building blocks in place, you'll be ready to tackle the challenge of determining how best to configure your tools for SAFe® (bearing in mind of course that configurations will change over time).

Our solution is as lightweight as possible while still supporting a Full SAFe® configuration

SAFe® 5.0 Solution configurations for Jira Software

The tables on the following pages describe the ways in which Jira Software can be set up to support the four SAFe® configurations. This is where Jira shines in its ability to provide different options for configuring projects, custom fields, and workflows to suit the specific needs of each implementation.

These recommendations are intended to be used as guidelines or starting points, as most organisations have constraints that necessitate alternate configuration options.

Global configuration recommendations

- 'Epic' is used in place of 'Feature' in order to take advantage of Jira Software's special relationship between epics and stories
- Portfolio and Solution Kanban workflows are taken from Scaled Agile®
- It is possible to contain the deployment to a single project with creative use of boards, as well. Discrete projects are generally preferred as they provide more flexibility at the expense of administration
- Add Time Tracking fields to the screen(s) for any Issue Type(s) against which you would like to log Effort (Time)

Improve quality management

Our solution includes a recommended configuration for bugs or defects. The additional fields enable teams to improve their development process objectively using quality data from each sprint. In order to use this method, teams must:

- Fix their own defects
- Decide what constitutes a defect and what does not
- Commit to logging defects consistently
- Not use defect data punitively

Teams conduct their development activities as normal, but with the logging of defects added as they go.

For instance, let's say a developer is analysing the existing code, looking for a way to implement a new page design. During this phase of work, the developer spends a significant amount of time researching how to achieve cross-browser compatibility with the presented design, only to learn later that the product owner or the solution architect never planned for a specific client-side technology. This is an example of a planning defect, or something that the team failed to plan for.

This incident can be very instructive if we log it and attribute it to:

- Date
- Process phase we were in
- Process phase where the error was made
- Type of defect it was
- Root cause
- How long it took us to diagnose and fix

En masse, we're able to look at our defect data and identify trends that might be costing the team time or predictability. Frequent defects of type 'Oversight' or 'Education' might indicate that better checklists or mentoring could have a positive impact on the team's situation, e.g., reducing the number of overall defects, increasing velocity, and decreasing volatility.

Fig. 22: Defect Custom Fields

Defect custom field	Field options	Field description
Phase Injected	Any status of the team's workflow	When the error was made
Phase Removed	Any status of the team's workflow	When the error was found
Defect Type	e.g. User interface, Runtime error, Checking, Data, etc.	What type of defect
Root Cause	e.g. Education, Oversight, Rushing, etc.	What conditions led to the defect's injection

Embrace a DevOps culture by leveraging tight integration between tools

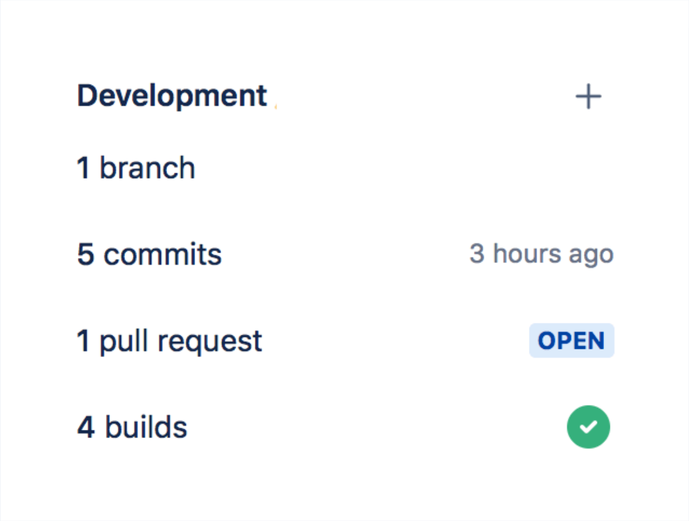
Once again we'll leverage Jira Software's close integration with all of Atlassian's other major products. It's capable of providing Confluence with issue data so that filter results and other issue elements can be displayed on pages, enabling live dashboards.

Issues representing user stories can be traced all the way from planning through development to deployment using Bitbucket and Bamboo.

Developers using Git for version control can reference a Jira issue's unique key in their commit message to associate any Jira issue with a commit in the repository. When integrated, Jira Software displays the issue's associated commits, branches, and pull request status right inside the issue.

A bit further down the line, if the commit is included in a build executed by a Bamboo Build Plan, the Jira issue will also display the current build status (pass/fail/warning) and any environment(s) the build has been deployed to.

Fig. 23: Jira's Development Panel shows associated code commits, branches, builds, test results, pull requests, and deployment when integrated with Bitbucket and Bamboo



Development +

1 branch

5 commits 3 hours ago

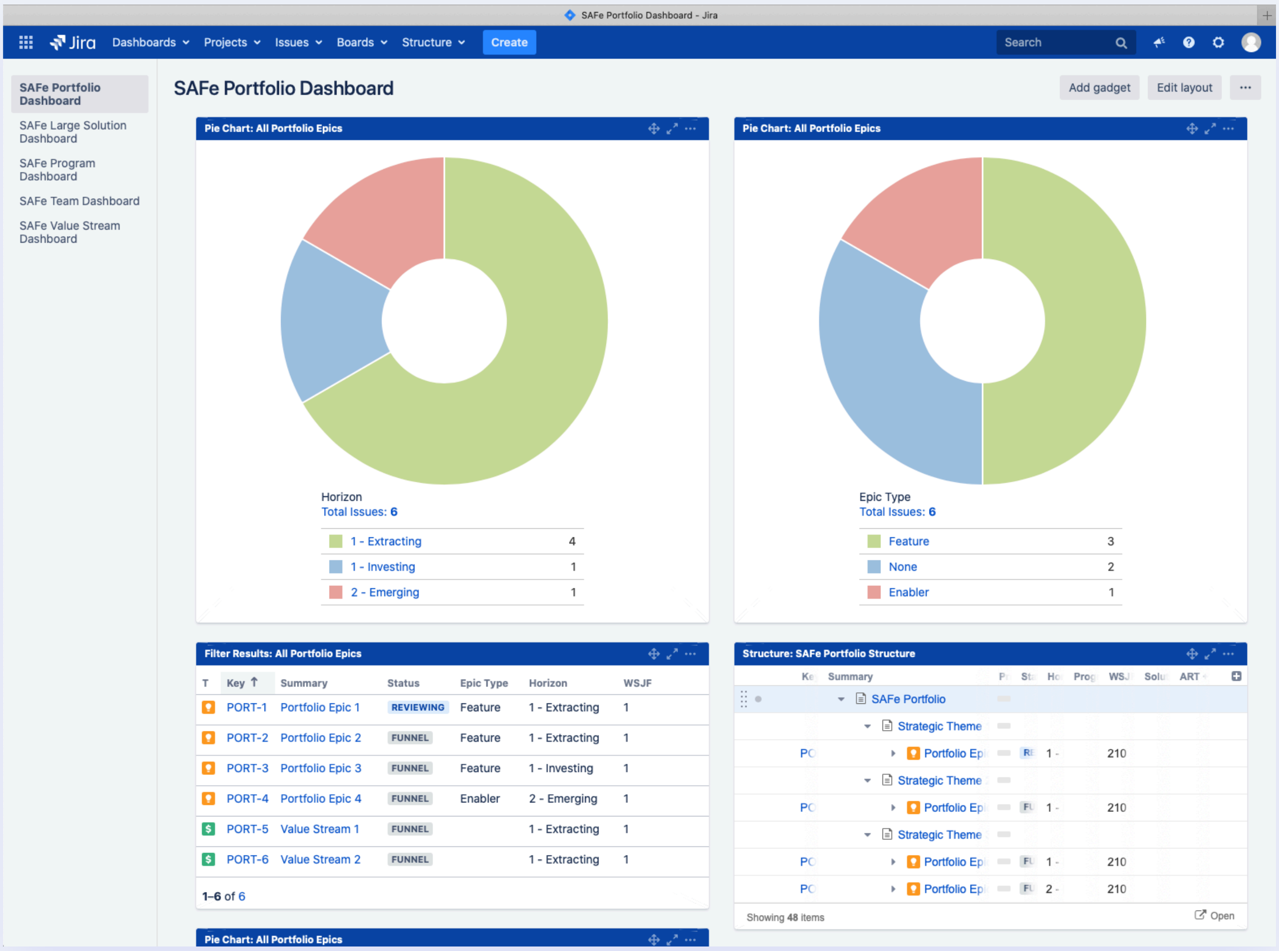
1 pull request OPEN

4 builds ✓

Control over lean budgets and value streams

Value Streams are first class citizens in the Adaptavist SAFe® Solution. You can create and manage them like any other Jira issue. They can be displayed on boards and dashboards, as well as linked to portfolio epics, capabilities, and features, depending on your exact SAFe® configuration.

Fig. 24: Jira Dashboards can provide a helpful interface for showcasing a portfolio, its epics, and its value streams


SAFe Portfolio Dashboard - Jira
Jira
Dashboards
Projects
Issues
Boards
Structure
Create
Search
SAFe Portfolio Dashboard
SAFe Large Solution Dashboard
SAFe Program Dashboard
SAFe Team Dashboard
SAFe Value Stream Dashboard
Add gadget
Edit layout
Pie Chart: All Portfolio Epics
Pie Chart: All Portfolio Epics
Filter Results: All Portfolio Epics
Structure: SAFe Portfolio Structure
Pie Chart: All Portfolio Epics

SAFe Portfolio Dashboard

Pie Chart: All Portfolio Epics

Horizon
Total Issues: 6

🟩 1 - Extracting	4
🟦 1 - Investing	1
🟥 2 - Emerging	1

Pie Chart: All Portfolio Epics

Epic Type
Total Issues: 6

🟩 Feature	3
🟦 None	2
🟥 Enabler	1

Filter Results: All Portfolio Epics

T	Key ↑	Summary	Status	Epic Type	Horizon	WSJF
	PORT-1	Portfolio Epic 1	REVIEWING	Feature	1 - Extracting	1
	PORT-2	Portfolio Epic 2	FUNNEL	Feature	1 - Extracting	1
	PORT-3	Portfolio Epic 3	FUNNEL	Feature	1 - Investing	1
	PORT-4	Portfolio Epic 4	FUNNEL	Enabler	2 - Emerging	1
$	PORT-5	Value Stream 1	FUNNEL		1 - Extracting	1
$	PORT-6	Value Stream 2	FUNNEL		1 - Extracting	1

1–6 of 6

Structure: SAFe Portfolio Structure

Ke	Summary	P	Sta	Ho	Prog	WSJ	Solu	ART
	SAFe Portfolio							
	Strategic Theme							
PO	Portfolio Epi		RE	1 -		210		
	Strategic Theme							
PO	Portfolio Epi		FU	1 -		210		
	Strategic Theme							
PO	Portfolio Epi		FU	1 -		210		
PO	Portfolio Epi		FU	2 -		210		

Showing 48 items
Open

Consider Jira Align if…

your organisation requires an SOC3 compliant system, or generally needs tighter controls around budget, investment, and auditing.

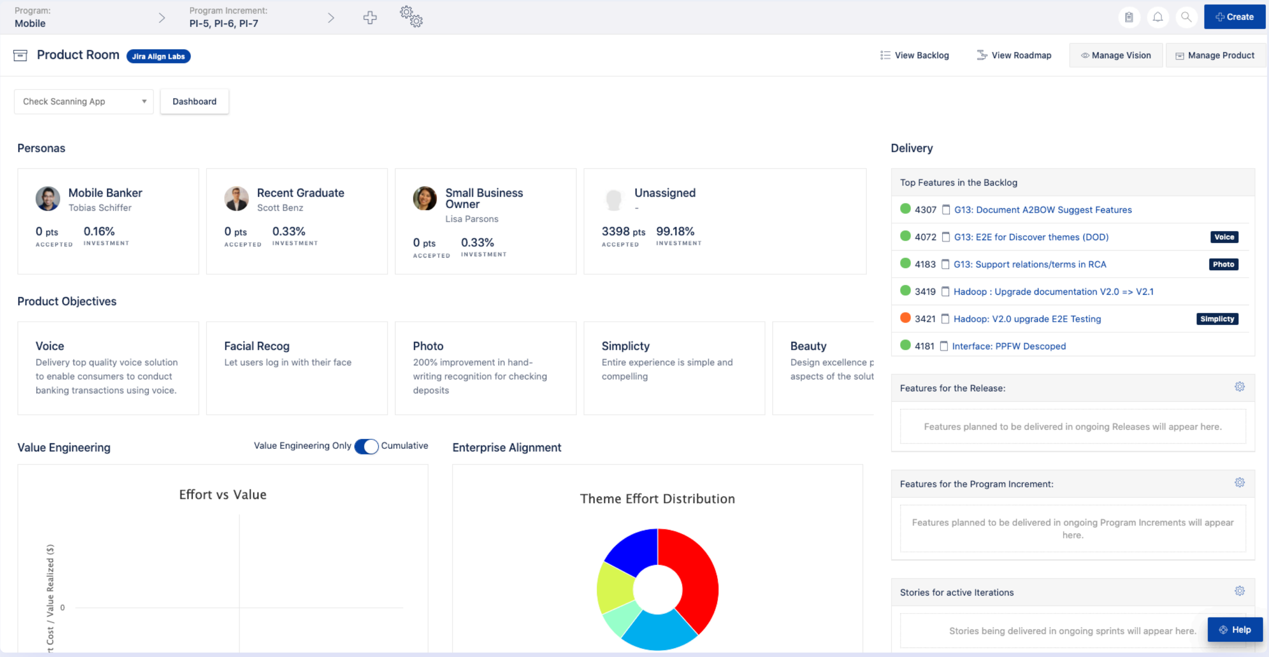


Fig. 25: Jira Align Investment vs. Actuals Report to track portfolio budgets, broken down by theme

Personas

Mobile Banker
Tobias Schiffer
0 pts ACCEPTED
0.16% INVESTMENT

Recent Graduate
Scott Benz
0 pts ACCEPTED
0.33% INVESTMENT

Small Business Owner
Lisa Parsons
0 pts ACCEPTED
0.33% INVESTMENT

Unassigned
-
3398 pts ACCEPTED
99.18% INVESTMENT

Product Objectives

Voice
Delivery top quality voice solution to enable consumers to conduct banking transactions using voice.

Facial Recog
Let users log in with their face

Photo
200% improvement in hand-writing recognition for checking deposits

Simplicty
Entire experience is simple and compelling

Beauty
Design excellence p aspects of the solut

Value Engineering

Enterprise Alignment

Delivery

Top Features in the Backlog

●	4307	G13: Document A2BOW Suggest Features	
●	4072	G13: E2E for Discover themes (DOD)	Voice
●	4183	G13: Support relations/terms in RCA	Photo
●	3419	Hadoop : Upgrade documentation V2.0 => V2.1	
●	3421	Hadoop: V2.0 upgrade E2E Testing	Simplicty
●	4181	Interface: PPFW Descoped	

Features for the Release:

Features planned to be delivered in ongoing Releases will appear here.

Features for the Program Increment:

Features planned to be delivered in ongoing Program Increments will appear here.

Stories for active Iterations

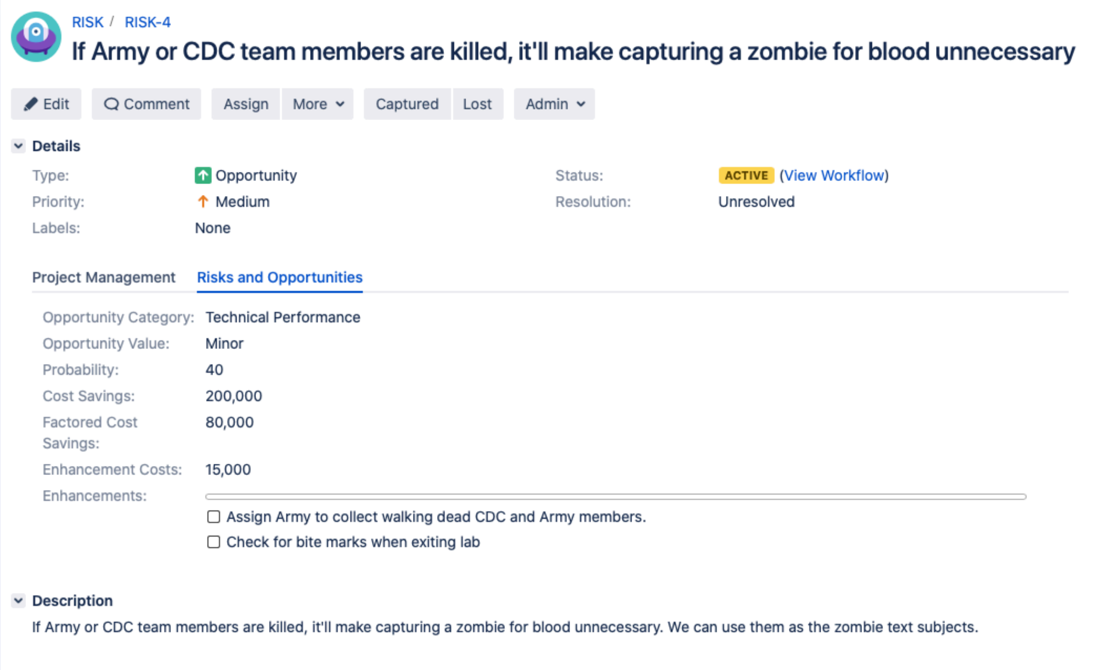
Stories being delivered in ongoing sprints will appear here.

Modern, flexible project and risk management

Many organisations prefer to use Jira to track and manage risks. Risk management is performed in several different ways throughout the software development industry, including ROMB, ROAM, and others. Our solution is capable of replacing homegrown tools such as spreadsheets or napkins.

Risks are tracked as discrete issue types within Jira and can be applied to any project. Risks can also be displayed on a dashboard or within a structure. ScriptRunner is used to calculate dynamic fields.

Fig. 26: Viewing a Risk with ScriptRunner-powered dynamic, calculated fields



RISK / RISK-4

If Army or CDC team members are killed, it'll make capturing a zombie for blood unnecessary

Details

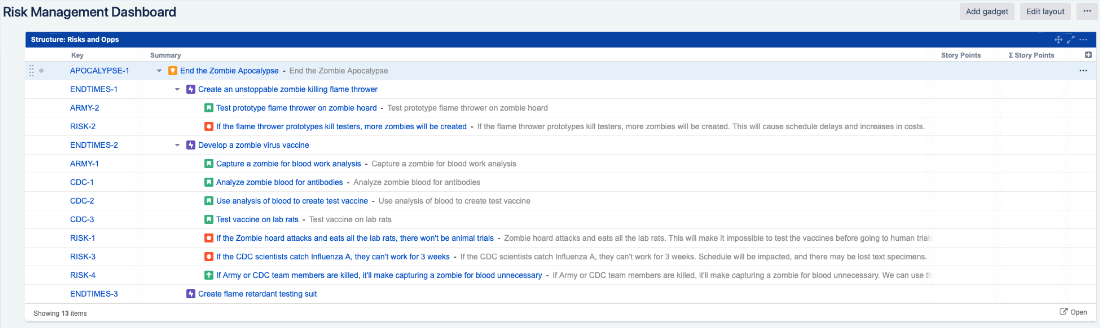
Type:	Opportunity	Status:	ACTIVE (View Workflow)
Priority:	↑ Medium	Resolution:	Unresolved
Labels:	None		

Opportunity Category:	Technical Performance
Opportunity Value:	Minor
Probability:	40
Cost Savings:	200,000
Factored Cost Savings:	80,000
Enhancement Costs:	15,000
Enhancements:	☐ Assign Army to collect walking dead CDC and Army members. ☐ Check for bite marks when exiting lab

Description

If Army or CDC team members are killed, it'll make capturing a zombie for blood unnecessary. We can use them as the zombie text subjects.

Fig. 27: Structure providing a view of all risks and opportunities associated with features



Risk Management Dashboard

Structure: Risks and Opps

Key	Summary	Story Points	Σ Story Points
APOCALYPSE-1	End the Zombie Apocalypse - End the Zombie Apocalypse		
ENDTIMES-1	Create an unstoppable zombie killing flame thrower		
ARMY-2	Test prototype flame thrower on zombie hoard - Test prototype flame thrower on zombie hoard		
RISK-2	If the flame thrower prototypes kill testers, more zombies will be created - If the flame thrower prototypes kill testers, more zombies will be created. This will cause schedule delays and increases in costs.		
ENDTIMES-2	Develop a zombie virus vaccine		
ARMY-1	Capture a zombie for blood work analysis - Capture a zombie for blood work analysis		
CDC-1	Analyze zombie blood for antibodies - Analyze zombie blood for antibodies		
CDC-2	Use analysis of blood to create test vaccine - Use analysis of blood to create test vaccine		
CDC-3	Test vaccine on lab rats - Test vaccine on lab rats		
RISK-1	If the Zombie hoard attacks and eats all the lab rats, there won't be animal trials - Zombie hoard attacks and eats all the lab rats. This will make it impossible to test the vaccines before going to human trials		
RISK-3	If the CDC scientists catch Influenza A, they can't work for 3 weeks - If the CDC scientists catch Influenza A, they can't work for 3 weeks. Schedule will be impacted, and there may be lost text specimens.		
RISK-4	If Army or CDC team members are killed, it'll make capturing a zombie for blood unnecessary - If Army or CDC team members are killed, it'll make capturing a zombie for blood unnecessary. We can use th		
ENDTIMES-3	Create flame retardant testing suit		

Showing 13 items

Fig 28a: Jira Software configurations for SAFe® 5.0

		Essential SAFe® Jira configuration	Large Solution SAFe® Jira configuration	Portfolio SAFe® Jira configuration	Full SAFe® Jira configuration
PROJECT SETUP		One Project/Team	One Project/Team	One Project/Team	One Project/Team
		One Project/ART (Program)	One Project/ART (Program)	One Project/ART (Program)	One Project/ART (Program)
			One Project/Solution	One Project/Portfolio	One Project/Solution
					One Project/Portfolio
ISSUE TYPES	Team	Story Bug/ Defect Task Sub-task	Story Bug/ Defect Task Sub-task	Story Bug/ Defect Task Sub-task	Story Bug/ Defect Task Sub-task
	ART	Epic (Feature)	Epic (Feature)	Epic (Feature)	Epic (Feature)
	Solution		Capability		Capability
	Portfolio			Portfolio Epic Value Stream	Portfolio Epic Value Stream

Fig 28b: Jira Software configurations for SAFe® 5.0

		Essential SAFe® Jira configuration	Large Solution SAFe® Jira configuration	Portfolio SAFe® Jira configuration	Full SAFe® Jira configuration
WORKFLOWS	Team	SAFe® Team Scrum Workflow	SAFe® Team Scrum Workflow	SAFe® Team Scrum Workflow	SAFe® Team Scrum Workflow
	ART	SAFe® Program Kanban Workflow	SAFe® Program Kanban Workflow	SAFe® Program Kanban Workflow	SAFe® Program Kanban Workflow
	Solution		SAFe® Solution Kanban Workflow		SAFe® Program Kanban Workflow
	Portfolio			SAFe® Portfolio Workflow	SAFe® Portfolio Kanban Workflow
BOARD CONFIGURATION	Team	SAFe® Team Scrum Board Includes Epics and Versions from ART Board	SAFe® Team Scrum Board Includes Epics and Versions from ART Board	SAFe® Team Scrum Board Includes Epics and Versions from ART Board	SAFe® Team Scrum Board Includes Epics and Versions from ART Board
	ART	SAFe® Program Kanban Board	SAFe® Program Kanban Board	SAFe® Program Kanban Board	SAFe® Program Kanban Board
	Solution		SAFe® Large Solution Kanban Board		SAFe® Large Solution Kanban Board
	Portfolio			SAFe® Portfolio Kanban Board	SAFe® Portfolio Kanban Board Issues ordered by WSJF custom field

Fig 28c Jira Software configurations for SAFe® 5.0

		Essential SAFe® Jira configuration	Large Solution SAFe® Jira configuration	Portfolio SAFe® Jira configuration	Full SAFe® Jira configuration
CUSTOM FIELDS	**Story**	Summary, Description	Summary, Description	Summary, Description	Summary, Description
	Bug/ Defect	Summary, Description Phase Injected, Phase Removed Defect Type, Defect Reason	Summary, Description Phase Injected, Phase Removed Defect Type, Defect Reason	Summary, Description Phase Injected, Phase Removed Defect Type, Defect Reason	Summary, Description Phase Injected, Phase Removed Defect Type, Defect Reason
	Task	Summary, Description	Summary, Description	Summary, Description	Summary, Description
	Sub-task	Summary, Description	Summary, Description	Summary, Description	Summary, Description
	Epic	Summary, Description, Epic Name	Summary, Description, Epic Name	Summary, Description, Epic Name	Summary, Description, Epic Name
	Capability		Summary, Description		Summary, Description
	Portfolio			Summary, Description User Business Value Time Criticality Risk Reduction/Opportunity Enablement Cost of Delay WSJF	Summary, Description User Business Value Time Criticality Risk Reduction/ Opportunity Enablement Cost of Delay WSJF

Intake and request management

Jira Service Desk Projects can be created to establish any number of independent portals for customers. Each portal can be configured with request groupings and types that aid users in submitting requests correctly.

For product intake situations, common request types include:

- Feature suggestion
- Submit an idea
- Report a bug
- Request enhancement.

Each request type can be configured with custom fields of your choosing, enabling flexibility to collect any and all relevant information from users at the point of entry. Additionally, requests can be retroactively logged and attributed to a requestor for real world scenarios where not everybody has been able to use the portal for one reason or another.

To establish traceability between a request and its implementation in a team's backlog, simply issue link the original request to the appropriate story or stories.

Naming convention for SAFe® schemes

We recommend using schemes and an appropriate naming convention for consistency and ease of administration.

Guidance on scheme configuration is provided in the table below.

Fig. 29a: Jira Software configurations for SAFe®

Jira scheme	Jira entity type	Scheme elements	Purpose
SAFe® Team Workflow	Workflow Scheme	Workflow(s) for Team Projects	Ensures all Team Projects have the same set of Workflows
SAFe® Team Screen	Screen Scheme	Screens for Team Projects	Ensures all Team Projects have the same set of Screens and Fields
SAFe® Team Issue Type Screen	Issue Type Screen Scheme	Screen scheme for Team Projects	Ensures all Team Projects have the same set of Screen Schemes, Actions and Issue Types
SAFe® Team Issue	Issue Type Scheme	Issue Type(s) for Team Projects	Ensures all Team Projects have the same set of Issue Types
SAFe® Program Workflow	Workflow Scheme	Workflow(s) for Program Projects	Ensures all Program Projects have the same set of Workflows
SAFe® Program Screen	Screen Scheme	Screens for Program Projects	Ensures all Program Projects have the same set of Screens and Fields
SAFe® Program Issue Type Screen	Issue Type Screen Scheme	Screen scheme for Program Projects	Ensures all Program Projects have the same set of Screen Schemes, Actions and Issue Types
SAFe® Program Issue Type	Issue Type Scheme	Issue Type(s) for Program Projects	Ensures all Program Projects have the same set of Issue Types

Fig. 24b: Jira Software configurations for SAFe® 5.0

Jira scheme	Jira entity type	Scheme elements	Purpose
SAFe® Program Workflow Scheme	Workflow Scheme	Workflow(s) for Program Projects	Ensures all Program Projects have the same set of Workflows
SAFe® Program Screen	Screen Scheme	Screens for Program Projects	Ensures all Program Projects have the same set of Screens and Fields
SAFe® Program Issue Type Screen	Issue Type Screen Scheme	Screen scheme for Program Projects	Ensures all Program Projects have the same set of Screen Schemes, Actions and Issue Types
SAFe® Program Issue Type	Issue Type Scheme	Issue Type(s) for Program Projects	Ensures all Program Projects have the same set of Issue Types
SAFe® Portfolio Workflow	Workflow Scheme	Workflow(s) for Portfolio Projects	Ensures all Portfolio Projects have the same set of Workflows
SAFe® Portfolio Screen	Screen Scheme	Screens for Portfolio Projects	Ensures all Portfolio Projects have the same set of Screens and Fields
SAFe® Portfolio Issue Type Screen	Issue Type Screen Scheme	Screen scheme for Portfolio Projects	Ensures all Portfolio Projects have the same set of Screen Schemes, Actions and Issue Types
SAFe® Portfolio Issue Type	Issue Type Scheme	Issue Type(s) for Portfolio Projects	Ensures all Portfolio Projects have the same set of Issue Types
SAFe® Large Solution Workflow	Workflow Scheme	Workflow(s) for Large Solution Projects	Ensures all Large Solution Projects have the same set of Workflows
SAFe® Large Solution Screen	Screen Scheme	Screens for Large Solution Projects	Ensures all Large Solution Projects have the same set of Screens and Fields
SAFe® Large Solution Issue Type Screen	Issue Type Screen Scheme	Screen scheme for Large Solution Projects	Ensures all Large Solution Projects have the same set of Screen Schemes, Actions and Issue Types
SAFe® Large Solution Issue Type	Issue Type Scheme	Issue Type(s) for Large Solution Projects	Ensures all Large Solution Projects have the same set of Issue Types

Atlassian Marketplace Apps

The table below includes all of the Marketplace apps included in the SAFe® solution.

Fig. 25: Atlassian Marketplace apps for the SAFe® solution

Marketplace App	Product	Platform Compatibility	Benefits
Adaptavist ScriptRunner for Jira	Jira	Server / Data Center	Provides scripted field capabilities
Easy Agile Programs	Jira	Server / Data Center	Provides program boards and visual dependency mapping
Easy Agile User Story Maps	Jira	Server / Data Center	Provides story map view of features and stories
Easy Agile Roadmaps	Jira	Server / Data Center	Provides roadmap view of features and releases
ALM Works Structure	Jira	Server / Data Center	Provides hierarchical view of epics, capabilities, features, stories, PIs, sprints, teams, etc
ALM Works Structure Gantt	Jira	Server / Data Center	Provides Gantt chart view to conflate with standard structures.
ALM Works Structure Pages	Jira	Server / Data Center	Provides ability to include Confluence page content into standard structures
Atlassian Jira Service Desk	Jira	Server / Data Center	Provides a customer portal and configurable requests for request intake and management
Adaptavist ScriptRunner for Bitbucket	BitBucket	Server / Data Center	Provides helpful customisations for organisations to manage cadence, integration, and standards

Reporting and analytics

Adaptavist Quantic Platform with SAFe® 5.0 Reports and Analytics includes 3-5 SAFe® reports that integrate with your Jira Software Server or Data Center instances.

Atlassian Jira Align compatibility

If your organisation uses Jira Align or is looking into adopting the tool, our recommended configuration for Essential SAFe® Teams and Programs is compatible with Jira Align. Adaptavist is a leading provider of Jira Align implementation as part of our tooling practice for large-scale agile transformations.

If you want to learn more about Jira Align and/or pose a question to our experts, head to adaptavist.com/jira-align

Combining Atlassian products for SAFe®

Now that we've introduced the individual tools, add-ons, and integrations, we want to show you how combining tools further can be beneficial. By combining Atlassian Confluence, Bitbucket, and Bamboo with Jira Software, organisations wield a fully-featured development suite that offers powerful issue tracking, backlog management, team management, document collaboration, source code management, and CI/CD.

Confluence is a key component of the Customer Centricity and Continuous Exploration SAFe® processes, as it provides the ability to create and share pages of content with others throughout an organisation. Examples of applications of this ability include collaborating on product designs, product roadmaps, lean business cases, or sprint retrospectives. The possibilities are endless.

Bitbucket and Bamboo are critical components of the Continuous Delivery Pipeline in SAFe®. Bitbucket provides source code management, repository hosting, and rich integrations with Jira and Bamboo, enabling story-to-deployment traceability through Smart Commit tagging.

Bamboo can be used to automatically build, test, notify, package, deploy, and release product components, artefacts, or even entire systems. Such capabilities and integration with other tools in the suite enable organisations to rally around a common framework for management, design, planning, tracking, reporting, and more

Confluence

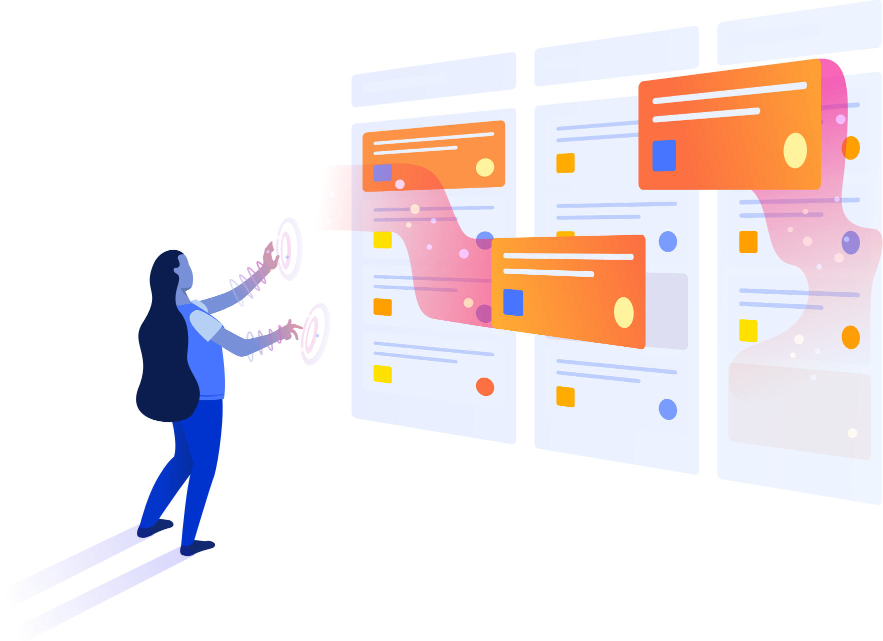
Confluence is a key component of the Customer Centricity and Continuous Exploration SAFe® processes, as it provides the ability to create and share pages of content with others throughout an organisation. Examples of applications of this ability include collaborating on product designs, product roadmaps, lean business cases, or sprint retrospectives. The possibilities are endless.

Space for Program/ART

- Roster
- Features
- Templates
- Teams
- Roadmap

Spaces for Teams

- Roster
- Onboarding info
- Templates
- Development environment setup
- Helpful links and resource
- Policies
- Reports and historical data
- Initiatives



Bitbucket

Bitbucket and Bamboo are critical components of the Continuous Delivery Pipeline in SAFe®. Bitbucket provides source code management, repository hosting, and rich integrations with Jira and Bamboo, enabling story-to-deployment traceability through Smart Commit tagging.

No matter what your current practice is, you should consider how your source code repositories are logically structured. What works for one team today is likely not to work for multiple teams tomorrow, so care should be taken to configure Bitbucket's projects and repositories such that they enable good engineering practices, while also supporting the growth of your engineering staff and product portfolio.

Projects = multiple repositories, e.g., one system or product

Repositories = 1 artefact

Bamboo

Bamboo can be used to automatically build, test, notify, package, deploy, and release product components, artefacts, or even entire systems. Such capabilities and integration with other tools in the suite enable organisations to rally around a common framework for management, design, planning, tracking, reporting, and more.

Similar to Bitbucket, thought must be put into how Bamboo can enable you and your teams to continuously integrate, test, release, and deliver software.

Build Projects and Plans

- Per solution
- Per product
- Per artefact

SAFe® level configurations

Special usage considerations for Large Solution and Portfolio SAFe®

As we’ve mentioned for these types of larger implementations, special care should be paid to aspects of the tool chain. The typical path we've seen for Large Solutions and solution trains starts from the successful launch of at least one train. After this successful launch, leaders almost immediately ask how the tools can be outfitted to support the management of multiple trains, simultaneously.

For the most part, the addition of a Large Solution level doesn't require any drastic tooling changes. Provided that you've started with a best practice configuration, you should have little to fear in the way of consistency across trains or teams.

Some care will need to be taken with the continuous delivery pipeline. Large Solutions typically involve suppliers or at least a larger number of internal contributors to a product. Care should also be taken to design and implement a Bitbucket and Bamboo strategy that aligns with the audience and development demands of the solution.

Capabilities of Large Solutions can be managed using a separate project and kanban board. Capabilities can be issue-linked to features, establishing their relationship similarly to how epics relate to stories.

Portfolio SAFe® configuration elements

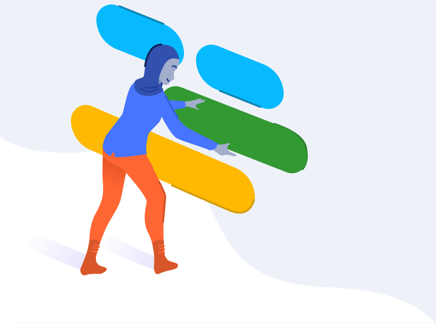
Portfolio SAFe® introduces Portfolio Epics, Value Streams, Lean Budgeting, and strategic alignment to features. For this SAFe® configuration, our solution relies on Confluence for collaboration on and presentation of the strategic portfolio.

Portfolio Epics and Value Streams can be created like features or capabilities in a dedicated project and kanban board.

Dashboard gadgets enable helpful, focused views of content at any level—Portfolio, Large Solution, Program, or Team.

Going Full SAFe®

Full SAFe® is simply everything above combined into one single implementation.



Customising the configuration

Every organisation customises portions of these recommended configuration, as some elements simply do not apply or aren't a good fit for one reason or another. This is expected with any implementation, and **the ability to do this is one of the key benefits of the flexibility of Atlassian tools**.

Business impact and outcomes

Improved collaboration and instant backlog setup in PI planning

We've been fortunate to witness the performance of this solution in our customers' environments. We've seen PI planning events with globally-distributed teams successfully leverage the configuration shown in this paper to build their backlogs, draw dependencies, manage inter-team work, and collaborate on issues.

Discovery of additional training

The intensity with which the tools are employed during PI planning often surfaces the need for organisations to be rock solid in their Atlassian skillsets. From end users to administrators, an appropriate level of familiarity with the tools is an absolute must in order to best organise and manage essential items such as team backlogs, the program backlog, dependencies, and more.

For PI planning, teams should consider the impact the event will have on infrequently-considered items such as project roles and permissions to mingle in other teams' backlogs, and manage these points accordingly in advance of the event.

Considered preparation goes a long way toward PI Planning success

Notes on adoption

Start with a pilot and continuously explore

Small teams with mature, consistent processes and good attitudes are prime candidates for piloting a new configuration.

Allow the big picture to emerge

Much like how the current situation did not manifest itself overnight, the new reality along with the path to get there will take time to emerge. Start by taking small steps toward the goal of improving one team or train at a time. Create surrogates and advocates by spending as much time as possible one-on-one with individuals, taking care to listen to their concerns as well as to share a consistent message.

With sustained effort, a shared understanding will emerge and the path forward will become clearer

Final thoughts

Evolve best practices and learn from experience

Sometimes it seems that the state of the art in software development changes by the hour. The tech industry is constantly learning from experience, and rightly so. Best practices emerge and evolve as new technologies ceaselessly disrupt our businesses and our world.

Adaptavist, along with our customers, have learned much in the past year working with the solution described in this paper. This virtual white paper will continue to change with our practice, and we will revise it here on a continuous basis.

Get more performance out of your existing tools

Most Jira Software and Confluence instances are cluttered and messy. This comes from the flexible nature of the tools, and the fact that their use has tended to grow organically within teams and companies. The good news is that by applying a healthy amount of best practice organisation, education, and standards, these tools provide everything required to scale agile in any organisation.

Drive culture change with processes, practices, and policies

In helping customers who are looking to drive cultural change in their organisations, we have found that applying new ways of working in SAFe® and the tool modifications detailed here can have an impact on culture. By focussing on improvements to processes, practices, and policies, the intersecting aspects of culture will often shift organically.

Foster a productive environment and develop talent

We've yet to meet a client that did not have members on their teams who lacked knowledge of some of the basic features of the Atlassian tools they use every day. It's a fact in organisations of every size, and of every level of maturity in terms of their use of software.

Ensuring that everyone using the tools knows as much about them as possible is the surest way to see that they're used productively and adopted widely. Studies have shown that fostering a productive environment and developing talent are the strongest investments you can make toward delivering the best software to your customers.

Achieve early wins to gain traction with SAFe®

In our experience the most successful SAFe® journeys begin with choosing the configuration that's most appropriate for your organisation and its unique needs. Then implement it pragmatically, with phased roll-outs of the parts of the solution that will deliver maximum value and pain reduction early on.

As we hope is apparent from this paper, the Atlassian toolset is an excellent choice to do just that—and to emerge on the other side with happier, higher-functioning teams, and with customers who are delighted by what they deliver.

Learn more or get in touch:
adaptavist.com/safe

Adaptavist SCALED AGILE PARTNER GOLD ATLASSIAN Platinum Solution Partner ENTERPRISE