Managing Workflows Using Jira

A Low-Code, Low-Cost Solution

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Introduction

Agencies often manage their internal processes, workflows, and submissions with a disparate collection of tools, shared drives, spreadsheets, email, and paper. This creates challenges with version control, transparency, and processing time. Information is often unavailable, tasks are manual and time consuming, and the status of a project or task in a specific workflow is not transparent, making it unclear who is responsible for the next step — a problem that can have catastrophic consequences. To avoid these pitfalls, Federal agencies can replace the manual processes that link different systems, data, and people across their organization. One of the key components of automating processes to create agility is digitizing workflows.

Using Atlassian Jira with the Ideal Forms for Jira plugin, TCG has built a FedRAMP Moderate workflow management solution that can be customized for use in any organization, and for any kind of program. Jira is a natural tool for facilitating agility throughout an organization as it was designed to support Agile software development teams. Jira is used by teams handling complex, fast-paced work — precisely what Federal agencies handle every day when managing recovery from natural disasters, planning billions of dollars in spending, managing maintenance on real property, and many more activities.

TCG's Jira workflow management solutions allow teams to quickly deploy data collection, reporting, and dashboarding functionalities, while relying on Jira's native permissions model for security and authorization. The Ideal Forms plugin allows developers to create intuitive user interfaces and gives administrators without advanced technical skills the ability to control many features. The interface, workflow management, and business rules are highly customizable.

Advantages of Jira as a Low-Code Solution

Workflow problems can affect all areas of an organization, be specific to offices, or particular areas of business. This means that any solution must be scalable and customizable to the needs and processes of any part of the organization. Jira projects are fast to implement, have the agility needed for on-the-fly changes, are highly customizable, and do not require extensive coding experience. In other words, there is a low barrier to entry for system administrators and easy maintenance by non-developers.

System administrators can build out a basic configuration file to include issues, permissions, validation checks and other rules. This allows non-developers — often the project manager or business manager on the program team — to work on new systems and updates and avoid having to go to an outside support team to manage the platform and user interface. With this greater control over the tool, each team can better serve its partners.

Features

Business Rules: Using Jira workflow and business rules, administrators set values and verifications for each stage in a workflow. The workflow engine has validation checks that identify errors and stop the user from transitioning to the next step until problems have been fixed. In addition, Jira handles multiple years of data without affecting performance — load times are fast and do not decline as more years of data are added.

Interface: Users can create unique page layouts for a wide variety of use cases, including mobile devices. The interface shows functions and permissions at each step that are relevant to different user levels, omitting any options that may not be relevant to a specified user or process step. It is highly customizable, allowing for screen space to be effectively utilized, and the Jira system is responsive to individual screen resolutions and devices.

Integration: Jira can connect with a wide number of applications including SharePoint, Power BI, and Microsoft Office. These integrations allow staff to work directly in documents without needing to download, edit, and upload.

Dashboards: The tool provides a dashboard that details each stage in the workflow, so any user can see where a task is in the process. Automated workflow notifications that require action are sent out to the individuals responsible for the next step. Every action is documented, and the dashboard provides clear information on who is working on what phase of a project, process, or task.

API: Integration with the Jira restful API helps automate data transfers, notifications, and other processes that were once completed manually.

The Solution at Work in the Federal Budget Community

TCG supported the Federal Budget Line of Business team in developing their Jira workflow management tool for processes such as apportionment and allotment, crucial aspects of the Federal budget cycle.

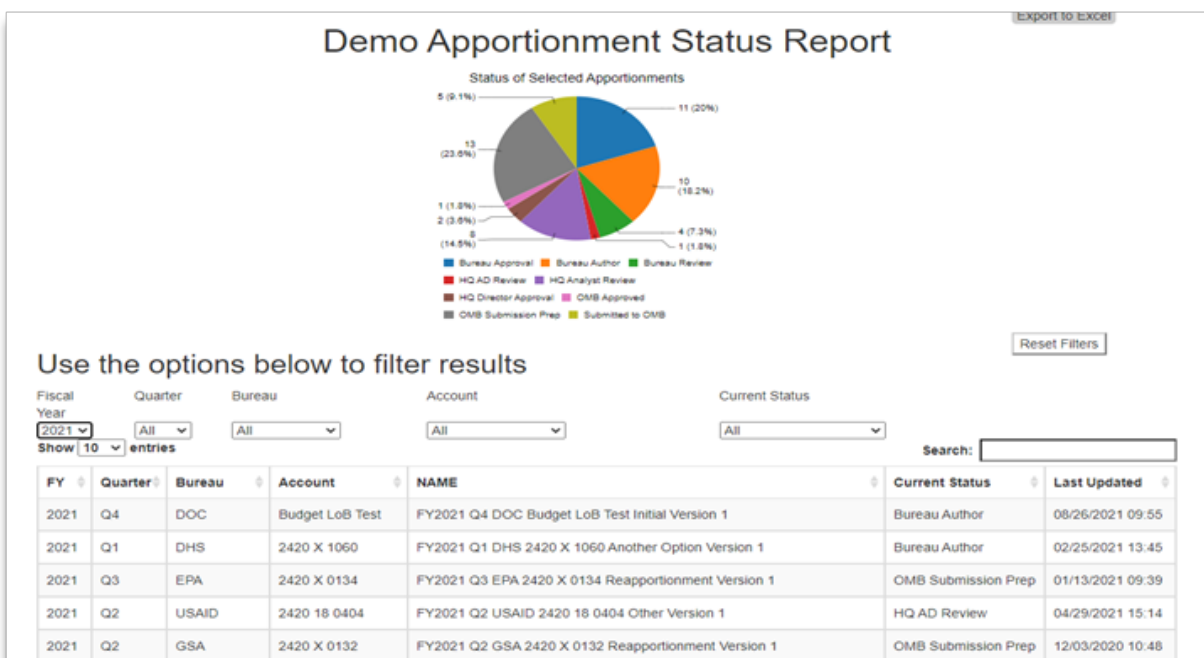## Managing Workflows in the Apportionment Process

In the apportionment process, agencies complete an SF-132 that details plans for budgetary spending throughout an agency. Depending on the agency, completing the report requires data collection, reporting, and validation from several bureaus and departments within a federal agency. Jira enables tracking all of the work that goes into completing the SF-132 and manages the various versions, as well as organizing the permissions and the parameters for valid data that is input and submitted by each bureau and department.

Using Jira workflow and Ideal Forms business rules, the required values and verifications for each stage in the apportionment workflow can be set. The workflow engine has validation checks that stop the user from transitioning to the next step until any problem with the data it has identified is fixed. At each stage, authors and approvers work directly in the apportionment, so there is no need to download the file. This is accomplished by way of SharePoint integration, allowing for authors and approvers at each stage to work directly on the apportionment file without needing to download and re-upload their work. In addition, Jira handles multiple fiscal years of data without impacting performance — load times are fast and do not decline as more years of fiscal data are added.

The Federal Budget Line of Business represents a community of financial (not technical) experts, and the tools built on Jira are tailored and customized to meet their requirements, helping budget offices become more agile through better workflows, automated processes, and efficient data management.

Cost Savings and Accelerated Delivery

The government's analysis shows that the initial implementation was approximately $500 thousand cheaper than a traditional acquisition activity could provide, and was fielded in less than half the time.

There was an estimated savings of approximately $1 million for each additional agency that adopted the workflow system, and it was fielded in less than a quarter of the time (approximately 3 months on average).

The Numbers

10

Budget processes
supported using Jira

10

CFO ACT agencies
using the system

50

Jira instances supporting all
Budget Line of Business partners

30

Hours to stand up a
new Apportionment system

2,000+

Users in Jira

Summing Up

Jira is a proven tool for workflow management, and it's likely available in your environment today, with key benefits to manage your complex workflows.

- **Scalability in all dimensions:** vertical, horizontal, storage, network

- **Complex data organizations:** flexible object modeling and object types by use case

- **Complex granular security:** multi-tenant environment to support use cases across agencies

- **Workflow engine:** flexible workflow engine for each use case

- Inbound and outbound email processors

- **Server-side processing** for asynchronous and scheduled work

- **Robust API:** MAX.gov runs a Service Oriented Architecture

- Reporting engine

- **Flexible user interface** to accommodate varying user experiences

- FedRAMP Moderate

Learn More

To learn more, schedule 15 minutes with us to see how your program can benefit from TCG's workflow management solutions using Jira. You can also read more about the Apportionment Manager system on our website.

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