

# DLF 2012 Using Confluence for Project Planning

## Background:

- Confluence = Knowledge management tool for sharing & organizing information, as well as fostering collaboration
- UCSD Library started using Confluence in 2009
  - Since then, content and uses has been growing...there are currently over 50 different spaces in Confluence at the UC San Diego Library.
- Created the project template in January 2010 as a way to incorporate project planning into Confluence.

## Goals:

- Make planning & executing a project easier
- Provide the foundation for project planning, scheduling, & resource allocation (not to mention risk management)
- Transparency & consistency across projects
- Report out on progress

## Demo:

- [DLDP Home](#)
- [DLP Projects Portfolio \(Active Projects\)](#)
- [Sample Project](#)
- [Sample Project Plan](#)
- Current Projects:
  - [ECE Distinguished Lecturer Series](#)
  - [Baca Project](#)

## Key Features & Potential Benefits:

- Define the scope & list the milestones of the project (or WBS - Work Breakdown Structure)
- Bring out assumptions and raise critical issues early on
- Delegate tasks and responsibilities, create accountability and commitment for specific project tasks
- Document work and measure progress
- Portfolio provides snapshot across projects
- *URL* to each project page

Icon

NOTE: Requires effort and continual refinement to keep it up-to-date and useful.



### Pros:

- Integration: Allows for consistent project documentation in an existing system used in the Library.
- Data entry using the templates is very simple and direct.
- Structured data allows for compiling and presenting data in new/interesting ways
  - Using data fields such as Strategic Direction allowed us to create a [custom Dashboard](#) showing all projects in Confluence organized by Strategic Direction.

### Cons:

- Third-party plugins now require a commercial license and are relatively expensive.
- The plugins are on the critical path for Confluence upgrades.
- Limited functionality compared to software specifically geared towards project management.

### Core Plugins used for UCSD Confluence Project Template:

- Scaffolding: [http://www.customware.net/store/plugins/confluence/scaffolding\\_plugin.html](http://www.customware.net/store/plugins/confluence/scaffolding_plugin.html)
  - Use: To create the PM template.
- Linking: [http://www.customware.net/store/plugins/confluence\\_plugins/linking\\_plugin.html](http://www.customware.net/store/plugins/confluence_plugins/linking_plugin.html)
  - Use: To create “live” links to the PM template. So if we add an “On Hold” phase option, all current PM pages using the template inherit the change.
- Reporting: [http://www.customware.net/store/plugins/confluence\\_plugins/reporting\\_plugin.html](http://www.customware.net/store/plugins/confluence_plugins/reporting_plugin.html)
  - Use: To create the table view for a quick glance at all projects.
- Graph: <https://studio.plugins.atlassian.com/wiki/display/CHRT/Gantt+Charts>
  - Use: To create a graphical view of the start date and revised due date for all projects.

Added by [Crichtlow, Matt](#), last edited by [Garcia-Spitz, Cristela](#) on May 16, 2011 ([view change](#))

### Site Navigation

- DLP Guides, Policies & Procedures
- DLP Technical Information
- DLP Related Activities
- DLP Program Meetings
- DLP Program Development 2012-2013
  - DLP Projects Monthly Status Report
- DLP Project Proposals
- DLP Projects Roadmaps
- DLP Projects Portfolio (Active Projects)
  - AV Dissertations
  - Baca Project
  - Baja California
  - Baja Journals of Prevent Meigs
    - Meigs Project Plan
      - Meigs Meeting 2012.02.23
      - Meigs Meeting 2012.05.10
      - Meigs Meeting 2012.06.07
  - Born Digital AV Dissertations
  - CA/VP
    - CA/VP Project Plan
  - CineWest
  - CME
  - Cook-Rappaport Slides
  - DAMS Legacy Video Reformatting
  - DMCA
    - DMCA Project Plan
      - DMCA editing checklist
      - DMCA Forms
      - DMCA Juries
      - DMCA Meetings
      - DMCA Metadata Specs
        - DMCA Metadata Component
        - DMCA Multi-channel files
        - DMCA Outsourcing 0.5' reels
        - DMCA Spreadsheet
        - DMCA Steps to Test Run
        - DMCA Tools - Pros & Cons
        - DMCA Training
        - UCSD Libreres Metadata Creation Guidelines for

### Announcements

Welcome DLP Community!

General information on the Digital Library Program (DLP) can be found on the [DLP LISN site](#), such as:

- Digital Library Collections Inventory
- Project Proposal Process
- Documentation on the DAMS
- Organizational Chart
- Annual Reports

The Digital Library Program Confluence site is a web-based, collaborative space for sharing information about DLP activities. It gives us the ability to search across content, track changes, and add more context to our information.

Here you'll find:

- **DLP Home** - Contains general announcements and links to additional information. The Site Navigation is on the left, which currently has a few pages with DLP Program information, followed by the DLP Projects Portfolio. We've taken a projects-based approach to structuring this portion of the wiki.
- **DLP Projects Portfolio** - This page provides an overview of the projects including the Project Manager, Project Lead, and Dates. It's also a nice snapshot of the various projects going on in the DLP.
- **Project Details** - If you click on the project, you'll see the Project Details page containing an overview of the project and information like the project status and major milestones.
- **Project Plan** - From here, you can drill down further to the Project Plan page. This is where you will find details on the project including the names of those involved, recent developments, and links to meeting information. Pages created from the Project Plan are open and flexible to be used based on the needs of the project.
- **Navigation** - Use the bar on the top of the page or links at the bottom of the page to navigate the space. You can also link directly to pages by going to [Edit](#) > Insert Link or by copying and pasting the URL of the page.
- **Examples** - There's a [Sample Project](#) with some ideas of how the project space can be organized, but remember this is a work in progress and it depends on you and your project team to organize and maintain the space.
- **Templates** - The Projects Portfolio and Project Details pages are based on a templates designed by IT (special thanks to Matt Crichtlow). These templates are maintained by IT and have a fixed set of fields to ensure consistency.

Please send any feedback or suggestions for improvements to [dp@ucsd.edu](mailto:dp@ucsd.edu).

For more information on Confluence, visit <http://www.atlassian.com/software/confluence/> which contains a brief overview video. There's also a [User Manual](#) and [Product Demo](#) for more detailed information.

But, the best way to learn is just to start using it! Review existing content and add additional content or comments. Be sure to add your name and role to the projects you are working on (simply go to [Edit](#) at the top right corner of the page). There's a ["Page History"](#) feature for versioning so feel free to play around - your changes will be tracked and we can always roll back to previous page versions if needed.

### Search

### News

Garcia-Spitz, Cristela posted on Aug 04, 2011

## DLP Project Ingest Workflow

See: [DLP Project Ingest Workflow](#)

[Edit](#)

Garcia-Spitz, Cristela posted on Aug 09, 2010

## Wiki LibGuide

For more information on wikis, see this LibGuide: <http://libguides.ucsd.edu/wikis>

[Edit](#)

Garcia-Spitz, Cristela posted on Apr 08, 2010

## DCPS Mapping Instructions

**Recently Added:** Instructions on ["How to Map to a DCPS"](#)

For a current list of the Digital Content Project Spaces (DCPS) by project, see the link to ["Storage Requirements"](#) at the bottom of the page.

**NOTE:** This is to keep track of the different workspaces for each project. If you are currently involved in a project, you are probably already mapped to the project's DCPS, so no action is needed. This is just a resource to reference should you need help mapping to a DCPS in the future.

Added by [Garcia-Spitz, Cristela](#), last edited by [Garcia-Spitz, Cristela](#) on Sep 02, 2011 ([view change](#))

## UCSD Libraries

### Project Details

Project Name	<Title>
Project Overview	<Purpose>
Project Manager	<Name>
Program Manager	<Name>
Strategic Direction	None
Current Risk Estimate	Low
Current Phase	Planning and Analysis
Start Date	Mar-15-2009
Original Due Date	Mar-16-2009
Revised Due Date	Mar-16-2009
Document Repository	Path on shared drive, e.g. P:\DLP Projects\Project Title

### Project Status

Date	Status
Feb-09-2010	

### Project Issues and Risks

Date	Status
Feb-09-2010	

### Strategic Milestones

#### Planning and Analysis

Milestone	Start Date	End Date	Status
Approve Project Proposal	Feb-09-2010	Feb-09-2010	complete
Complete Project Plan	Feb-09-2010	Feb-09-2010	complete
Kick off meeting	Sep-02-2011	Sep-02-2011	
Create inventory	Sep-02-2011	Sep-02-2011	
Get quote	Sep-02-2011	Sep-02-2011	
Obtain P.O.	Sep-02-2011	Sep-02-2011	

#### Implementation

Milestone	Start Date	End Date	Status
Digitization	Feb-09-2010	Feb-09-2010	on schedule, 30% complete
Description	Feb-09-2010	Feb-09-2010	overdue, 10% complete
Assembly Plan creation	Mar-02-2011	Mar-02-2011	
Assembly Plan testing	Jul-01-2011	Jul-01-2011	
Object Build	Mar-02-2011	Mar-02-2011	

#### Completion

Milestone	Start Date	End Date	Status
Final Assessment of Completed Goals & Objectives	Feb-09-2010	Feb-09-2010	
Sign off with vendor	Feb-09-2010	Feb-09-2010	
Publicity	Sep-02-2011	Sep-02-2011	
Document Lessons Learned	Feb-09-2010	Feb-09-2010	
Team Recognition	Feb-09-2010	Feb-09-2010	

Completed  No

# Sample Project

Edit Data | [Preview](#) | [Notation Guide](#) | [Save](#) | [Cancel](#) | [Edit Layout](#)

## UCSD Libraries

**Project Details**

**Project Name** <-Title>

**Project Overview** <-Purpose>

**Project Manager** <-Name>

**Program Manager** <-Name>

**Strategic Direction**  
 Supporting 1  
 Supporting 2  
 Supporting 3  
 None

**Current Risk Estimate** Low

**Current Phase** Planning and Analysis

**Start Date** Mar - 15 - 2009

**Original Due Date** Mar - 16 - 2009

**Revised Due Date** Mar - 16 - 2009

**Document Repository** Path on shared drive, e

**Project Status**

Date	Status
Feb - 09 - 2010	

**Project Issues and Risks**

Date	Status
Feb - 09 - 2010	

## Strategic Milestones

**Planning and Analysis**

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**Completion**

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Sign off with vendor	Feb - 09 - 2010	Feb - 09 - 2010	
Publicity	Sep - 02 - 2011	Sep - 02 - 2011	

# Sample Project Plan

Added by Garcia-Spitz, Cristela, last edited by Garcia-Spitz, Cristela on Sep 05, 2012 (view change)

## Project Plan

- Project Overview
- Project Objectives
- Target Audience
- Priority
- Team
- Formats
- Approach
- Lessons Learned
- Resources
- Stats
- Promotions

## Project Site Navigation

- Expand all | Collapse all
- Sample Project Meetings
  - Sample Issues Log
  - Sample Status Report
  - Sample Risk Assessment

## Project Overview

Overview from the project proposal

## Project Objectives

Objectives from the project proposal  
 For more details: see Project Proposal Form

## Target Audience

- Description of Audience
- Include publicity and outreach efforts

## Priority

Description of any time constraints (NOTE: This is optional and might not apply to every project.)

## Team

Name	Contact Info	Department	Role	Responsibility	Average Number of Hours Spent on the Project per Week	Duration
			Project Lead			
			Subject Specialist			
			Format Specialist			
			Metadata Advisor			
			Administrator			
			Contributor			
			Consultant			
			DLP Project Manager			
			DLP Analyst			

## Formats

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

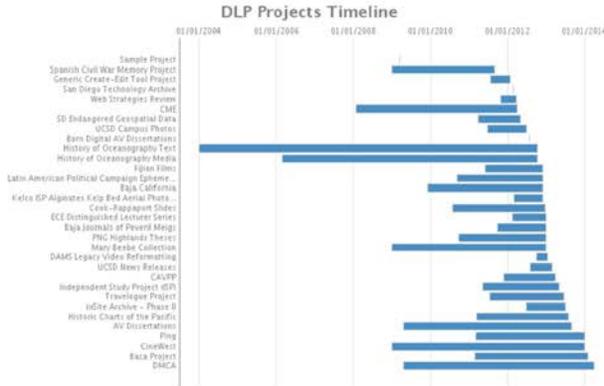
Number of objects by type	Number of files	Notes



## DLP Projects Portfolio (Active Projects)

Edit Share Add Tools

Added by [Critechow, Matt](#) last edited by [Trujillo, David](#) on Oct 16, 2012 ([view change](#))



### Project List

[Add a new DLP Project](#)

Project	Project Manager	Program Manager	Current Phase	Current Risk	Last Updated	Due Date	Revised Due Date
Sample Project	<-Name->	<-Name->	Planning and Analysis	Low	Sep 02, 2011	Mar 16, 2009	Mar 16, 2009
Spanish Civil War Memory Project	Matt Peters	Lynda Claassen	On Hold	Low	Oct 31, 2012	Feb 20, 2010	Aug 30, 2011
Generic Create-Edit Tool Project	Gabriela A. Montoya		On Hold	Low	Oct 31, 2012	Jan 29, 2012	Jan 29, 2012
San Diego Technology Archive	Tracey Hughes		On Hold	Low	Oct 30, 2012	Feb 27, 2012	Feb 27, 2012
Web Strategies Review	Cristela Garcia-Spitz	Martha Huska	Completion	Low	Mar 21, 2012	Feb 01, 2012	Mar 23, 2012
CME	Cristela Garcia-Spitz	Ken Calkins	On Hold	High	Oct 30, 2012	Oct 01, 2009	Apr 01, 2012
SD Endangered Geospatial Data	Tracey Hughes		On Hold	Low	Oct 30, 2012	May 01, 2012	May 01, 2012
UCSD Campus Photos	Kim Schwenk	Steve Coy	Implementation	Low	Oct 23, 2012	Jul 01, 2012	Jul 01, 2012



## Library Project Dashboard

Share Tools

Added by [Critechow, Matt](#) last edited by [Critechow, Matt](#) on Mar 30, 2011 ([view change](#))

### Dashboard Information

This space provides an overview of projects which are being managed in Confluence. You can click on any of the strategic direction links to see a list of projects related to that strategic direction. A full description of the strategic directions is provided in the right column.

UCSD Libraries Strategic Plan 2011-2014

#### In Progress Projects

- Core Direction 1
- Core Direction 2
- Core Direction 3
- Supporting Direction 1
- Supporting Direction 2
- Supporting Direction 3
- Other Projects

#### Completed Projects

- Core Direction 1
- Core Direction 2
- Core Direction 3
- Supporting Direction 1
- Supporting Direction 2
- Supporting Direction 3
- Other Projects

#### Strategic Directions

##### Core Direction 1:

*Re-imagine collections and information services to support our users, evolving information needs.*  
The Libraries will implement technological innovations and organizational changes that will make online information services the norm, meet user needs for seamless access to virtual and traditional resources, and engage users in their own and library spaces.

##### Core Direction 2:

*Create dynamic, flexible spaces that support the changing needs of users, staff, and collections.*  
Recognizing that the Libraries, physical space and environment continue to be highly valued by the University community, we will re-envision and re-purpose our space as needed to meet evolving campus and library needs.

##### Core Direction 3:

*Engage with partners to make digital scholarly work and data openly discoverable and accessible for the long term.*  
In response to growing campus-wide data management and preservation challenges, the Libraries will actively support open data and open access by collaborating with faculty, researchers, students, and other partners to ensure the long-term curation and accessibility of scholarly works in all formats.

##### Supporting Direction 1:

*Build a nimble, creative, sustainable, and efficient organization that supports continuing transformative change.*

To respond to rapidly changing circumstances, the Libraries will build an organizational culture that supports staff creativity, efficiency, development, and empowerment. We will increase transparency, engage in consistent multi-directional communication, and commit to making equitable opportunities available to all staff.

##### Supporting Direction 2:

*Lead the development of collaborations and partnerships that further the University's and*