The Ultimate Guide to Reporting in Jira Align

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Jira Align
SPECIALIZATION

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The goal of this white paper is to explore the robust reporting capabilities offered through Jira Align by Atlassian. It will cover Jira Align reports of specific value to Agile practitioners at the:

1. Team Level
2. Program Level
3. Portfolio Level
4. Enterprise Level

Each segment will briefly cover:

- How Jira Align effectively ties each level into the bigger enterprise picture
- Which stakeholders are most likely to use the reports available at each level
- Which Jira Align reports are likely to be most popular at each level and why

Jira Align is a cloud-based software designed from the ground up to effectively scale an organization's Agile practice from the individual development teams to the enterprise level. It offers a single source of truth that unifies overarching business goals and strategic planning with day-to-day productivity and provides practical visibility into every level of the organization so all stakeholders can work from a common, accurate, real-time database.

Here at Cprime, we're thrilled with how Jira Align rounds out the Atlassian suite so effectively, providing a technological framework that perfectly supports the Agile scaling principles we've used for years to guide our clients through that challenging but rewarding process. That's why we've developed an entire capability set in our practice around effectively implementing Jira Align and using it as a foundation for the successful scaling of Agile at large companies.

Learn more about Cprime's solutions around Jira Align

While providing enterprise management and control for a well-formed Agile-at-scale model, Jira Align also acts as a data aggregator that accepts inputs from numerous popular team productivity tracking tools, including the industry-leading Atlassian Jira platform. The application then takes all the collected data and produces hundreds of reports that promote transparency, support continuous improvement, enhance processes, and empower effective decision making at every level of the organization.

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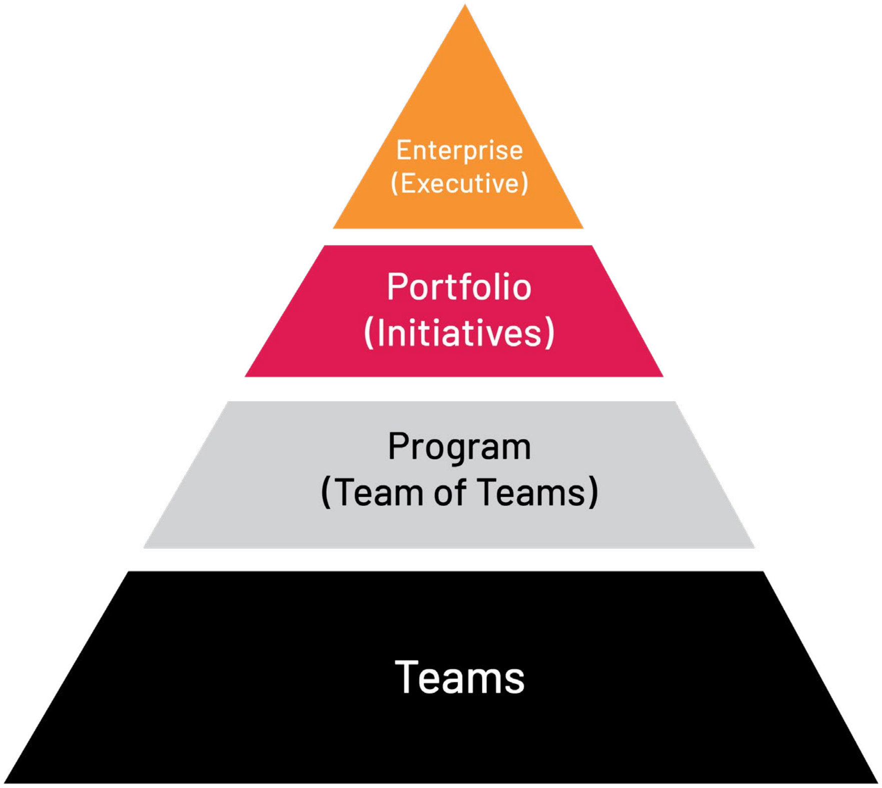
How Jira Align Ties Individual Teams into the Full Enterprise

With that concept in mind, we can start by picturing the full enterprise as a pyramid:



[Figure 1 - Representation of full enterprise as a pyramid; from team to executive level]

As you can see, all the individual development teams that are in the trenches getting work done day in and day out make up the solid foundation of the structure. That's because for the entire enterprise to take advantage of Agile at scale, the executives must effectively communicate the strategic initiatives coming down to those teams and that strategy must guide their daily activity. Likewise, all the data generated as team members do the work needs to filter up to stakeholders at each level so they can make decisions, adjust steering, and verify success.

Jira Align's reporting capabilities provide precisely that sort of top-down and bottom-up visibility to facilitate organizational alignment in real-time.

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Which Stakeholders Will Benefit From Team Level Reporting in Jira Align?

Theoretically, everyone in the organization can benefit from being able to access real-time data at the team level where strategic management and planning translate into productive action, and they can observe results on an hour-to-hour basis, if necessary.

In more practical terms, however, the roles likely to spend the most time poring over team level reports in Jira Align include:

- Scrum Masters
- Team Leads
- Product Owners
- Product Managers
- Portfolio Managers (occasionally)

As we look into some specific team level reports, we'll highlight why these individuals may want to access the information they contain, and how they can use it.

Examples of Popular Team Level Reports in Jira Align

The following reports are the most popular among Jira Align users, often because they provide wide-ranging snapshots of team level activity across one or more sprints. It's important to note, of course, that Jira Align also contains dozens of additional pre-formatted reports that get even more granular when a deeper dive is required. And, custom reporting is available when users are looking for specific insights that the established reports don't offer through the use of Atlassian Enterprise Insights or other third-party integrations. (To explore custom reporting in Jira Align, pick up our white paper dedicated to that topic.)

For a thorough explanation of every available report at the team level, check out this Jira Align support documentation.

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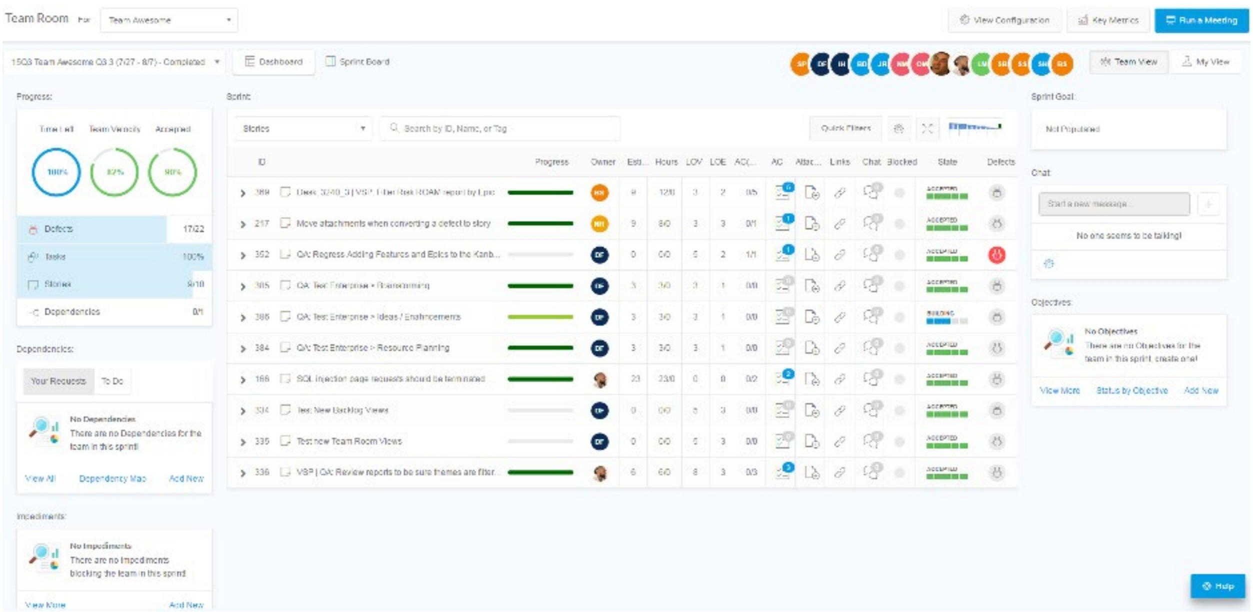
Team Room



[Figure 2 - Team Room Report - The optimal "home base" for Product Managers and Scrum Masters in Jira Align]

The Team Room serves as an optimal "home base" for Product Managers and Scrum Masters in Jira Align. In this one interconnected set of reports and views, they will find just about everything they need to carry out their day-to-day tasks, keep their finger on the pulse of the team, and make necessary decisions quickly and confidently.

With both a dashboard view and a classic Kanban-style sprint board view, all this data is easily accessible:

- Stories, tasks, and defects
- Progress
- Dependencies
- Impediments
- Sprint goal
- Objectives

With this information, Product Managers and Scrum Masters can:

- Adjust priorities and staffing on-the-fly as needs arise
- Run an efficient and informative Daily Standup
- Quickly access snapshot data to report to other stakeholders

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Sprint Metrics Report

Release/Sprint Metrics | Release/Sprint Metrics | Capture

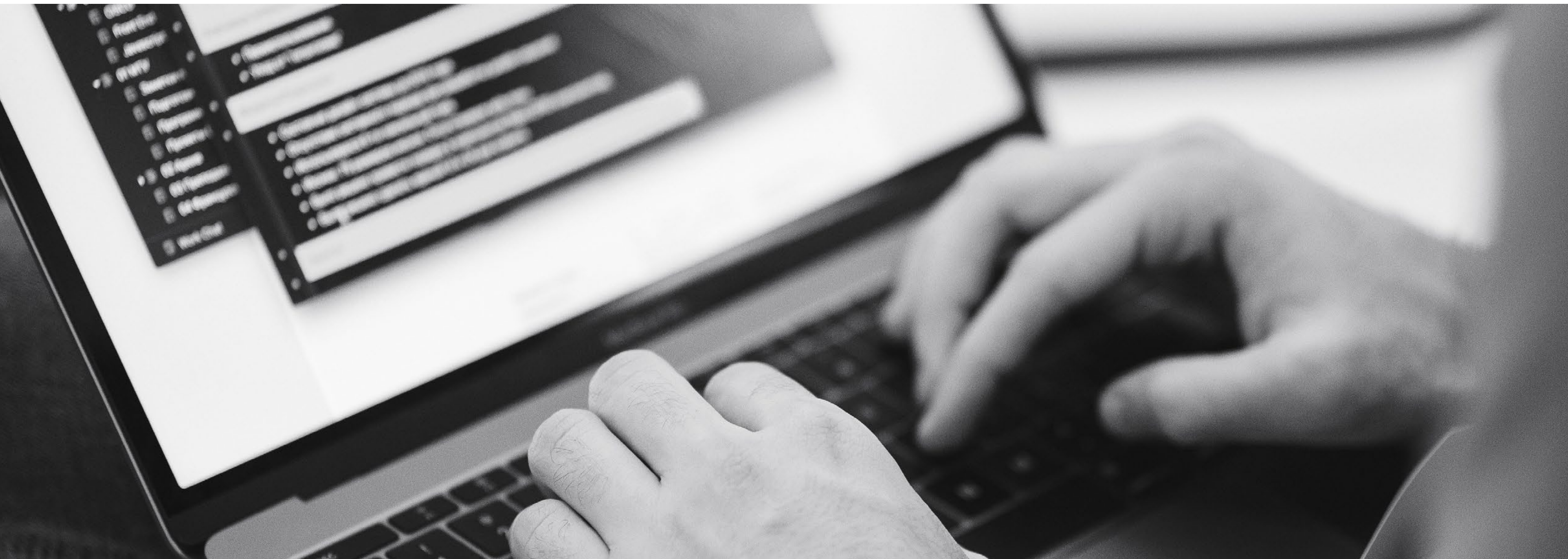
	Sprint Planning	SEP 25	SEP 26	SEP 27	SEP 28	SEP 29	SEP 30	OCT 1	OCT 2	OCT 3
Meeting Attendance	100%	0%	0%	0%	0%	100%	100%	100%	100%	100%
Absent List	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Scope Creep (added tasks)	N/A	15 t 91 h	38 t 152 h	0 t 0 h	0 t 0 h	22 t 63 h	1 t 0 h	1 t 0 h	2 t 12 h	7 t 23 h
Scope Creep (dropped tasks)	N/A	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h
Burn %	N/A	62%	113%	0%	0%	137%	146%	104%	137%	74%
Burn Hours	N/A	21 h	38 h	0 h	0 h	46 h	49 h	35 h	46 h	25 h
Bug Fix %	N/A	0%	0%	0%	0%	0%	0%	0%	0%	18%
Bug Fix Hours	N/A	0 h	0 h	0 h	0 h	0 h	0 h	0 h	0 h	1 h
Open Impediments	N/A	0	0	0	0	0	0	0	0	0
Defects Opened	N/A	7	6	7	0	3	19	28	23	36
Defects Closed	N/A	0	0	3	0	2	1	2	2	3
Defect Hours Spent	N/A	0 h	0 h	0 h	0 h	0 h	0 h	0 h	0 h	1 h
Code Reviews	N/A	0	0	0	0	0	0	0	0	0
Story Count	N/A	14	14	0	0	14	14	14	14	14
Task Count	N/A	96	137	0	0	146	147	148	158	161
Stories With no LOV	N/A	162	162	0	0	162	162	162	162	162
Stories with no LOE	N/A	114	114	0	0	114	114	114	114	114

	OCT 4	OCT 5	OCT 6	OCT 7	OCT 8	OCT 9	OCT 10	OCT 11	OCT 12	OCT 13	OCT 14	OCT 15	Sprint Review
Meeting Attendance	0%	0%	100%	100%	100%	100%	100%	0%	0%	100%	100%	100%	100%
Absent List	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Scope Creep (added tasks)	0 t 0 h	0 t 0 h	5 t 12 h	4 t 11 h	4 t 15 h	1 t 5 h	2 t 7 h	0 t 0 h	0 t 0 h	1 t 3 h	0 t 0 h	0 t 0 h	N/A
Scope Creep (dropped tasks)	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	0 t 0 h	N/A
Burn %	0%	0%	137%	167%	143%	83%	83%	0%	0%	199%	122%	0%	N/A
Burn Hours	0 h	0 h	46 h	56 h	48 h	28 h	28 h	0 h	0 h	67 h	41 h	0 h	N/A
Bug Fix %	0%	0%	0%	0%	0%	36%	0%	0%	0%	125%	0%	0%	N/A
Bug Fix Hours	0 h	0 h	0 h	0 h	0 h	2 h	0 h	0 h	0 h	7 h	0 h	0 h	N/A
Open Impediments	0	0	0	0	0	0	0	0	0	0	0	0	N/A
Defects Opened	35	3	16	37	46	35	30	30	3	29	32	32	N/A
Defects Closed	4	0	0	16	13	13	6	13	7	4	22	21	N/A
Defect Hours Spent	0 h	0 h	0 h	0 h	0 h	2 h	0 h	0 h	0 h	7 h	0 h	0 h	N/A
Code Reviews	0	0	0	0	0	0	0	0	0	0	0	0	N/A
Story Count	0	0	14	14	14	14	14	0	0	14	14	14	N/A
Task Count	0	0	165	167	169	172	174	0	0	174	174	173	N/A
Stories With no LOV	0	0	162	162	162	162	162	0	0	162	162	146	N/A
Stories with no LOE	0	0	114	114	114	114	114	0	0	114	114	66	N/A

[Figure 3 - Sprint Metrics Report - Offers grid-based view of all teams' performance across any sprint within PI]

The Sprint Metrics Report offers a grid-based view of all teams' performance across any sprints that fall within the same planning increment (PI). It's an excellent overview report that highlights:

- How different teams compare to each other across several qualitative and quantitative metrics
- How a series of consecutive sprints within the PI are trending
- Where adjustments may be needed to ensure longer-term PI goals will be met



As such, it's especially useful as a visual basis for discussion during sprint planning meetings, retrospectives, and post-PI meetings. Scrum Masters, team leads, Product Owners, and Program Managers are generally called on to plan for and facilitate these meetings, so they're likely to use the Sprint Metrics Report the most. Actively engaged Portfolio Managers may even pull it on occasion to get a glance at the overall health of the programs under their purview.

The report includes the following "gadgets"—groupings of data designed to provide a specific insight—among others:

- **Team Emotion** – Subjective record of how the team is feeling about the work and/ or the process. Look for trends to get ahead of potential problems via coaching or intervention.
- **Team Objectives** – How consistently is each team meeting its objectives? Look for trends to determine if the team needs more or less work, or if underlying issues are blocking optimal productivity.
- **Story Completion** – Each team commits to completing a certain number of stories during each sprint. If a team fails to do so regularly, it may indicate the need for intervention to improve productivity or to help the team better estimate their workload.
- **Splits & Drops** – Ideally, no stories should be split or dropped during a sprint. If a team does this regularly, it's a sign of estimating problems, either of story complexity or sprint commitment.
- **Goal State** – Is the team meeting their sprint goals regularly? If they always achieve every goal they're likely not stretching enough. If a team rarely reaches its goals, they're either overreaching or the goals aren't truly theirs to begin with. Both issues can lead to demotivated teams.

Many of the metrics highlighted in this report are clickable, allowing the user to drill down deeper into the data, or to pull up a closely related report, the Sprint Coaching Report.

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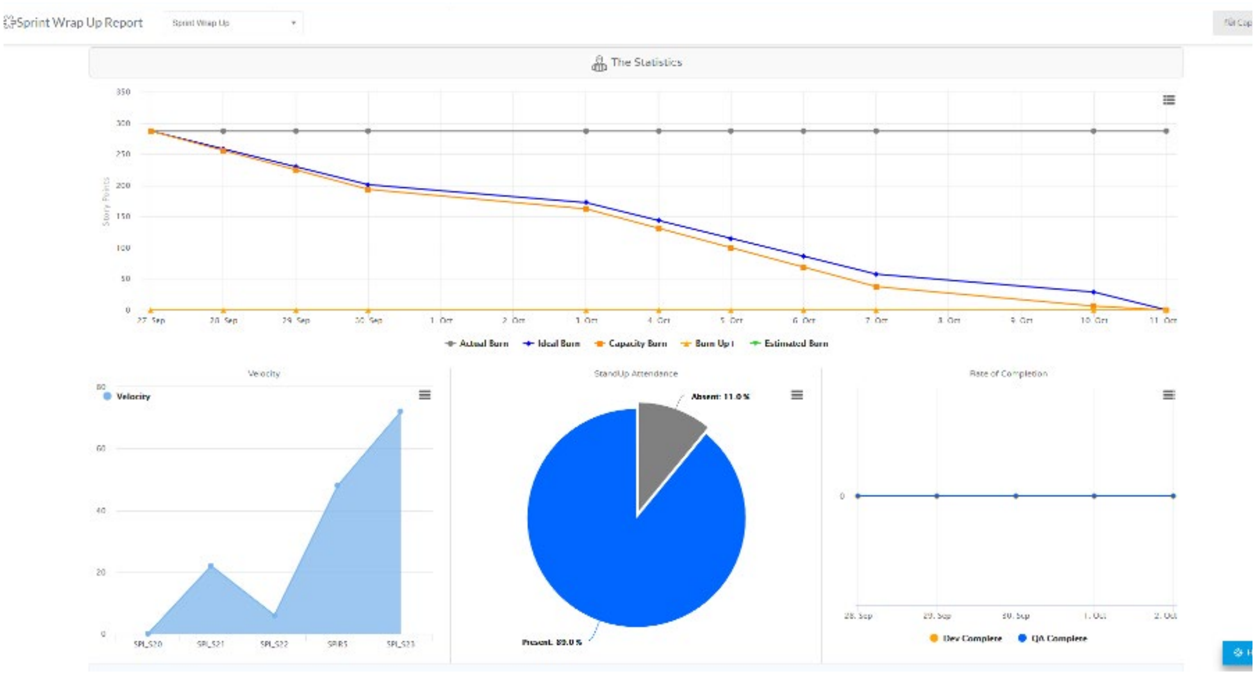
Sprint Coaching Report



[Figure 4 - Sprint Coaching Report - Compares and contrasts established sprint plan and objectives with actual results upon sprint completion]

The Sprint Coaching Report combines highly visual charts and graphs that compare and contrast the established sprint plan and objectives with actual results once the sprint is done. It “tells the story” of each sprint, making it a natural report to pull up during retrospectives. It highlights:

- The sprint’s established goals and objectives
- Each team’s performance against those goals and objectives
- Each team member’s contribution to the team’s overall performance

As noted above, many of the gadgets in the Sprint Metrics Report will link to the particular sprint’s Sprint Coaching Report for further insight. This allows stakeholders to move from generalized trends over several sprints to sprint-specific data, helping to identify outliers and confirm suspected issues to address. When consulted during a sprint, the Sprint Coaching Report also displays forecasted velocity and burndown based on what’s occurred thus far in the sprint.

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Scrum Masters, team leads, and Product Owners will all be heavily invested in this report as it offers an excellent basis for promoting continuous improvement at the individual team level, which has its place in every sprint planning session and retrospectives.

Here are some gadgets included in this report:

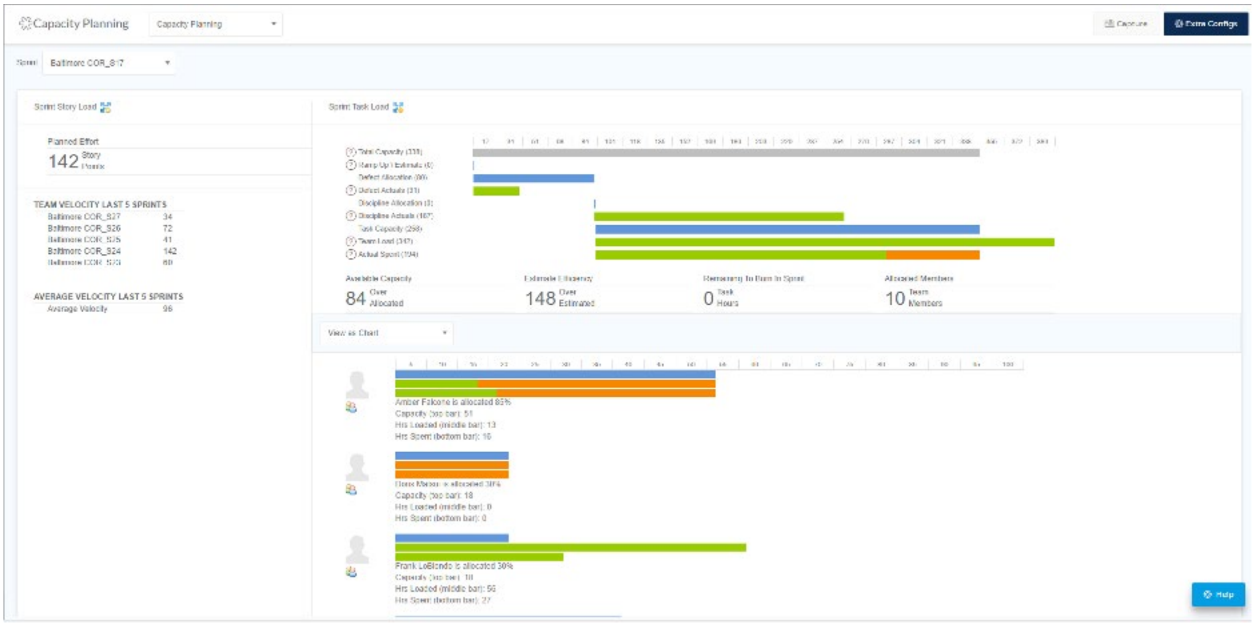
- **Sprint Goal/Objectives** - The main objectives the team committed to at the beginning of the sprint.
- **Committed Plan** - A more granular outline of commitments made during sprint planning, such as user stories, task hours and effort, and value points.
- **Burndown Chart** - Displays how task hours are burned down in the sprint compared to the ideal. If the sprint is not yet complete, this chart also shows the Estimated Remaining Burn.
- **Velocity Chart** - The velocity for the team over the past several sprints.
- **Standup Attendance** - This can potentially identify unengaged team members or highlight needed improvements in standup meeting quality.
- **Sprint Story Progress** - A complete view of progress across all committed stories: progress bars, story health, acceptance criteria, value points, effort points, and the total number of hours spent.

Capacity Planning Report

The Capacity Planning Report brings together the current and historical information Scrum Masters need for effective sprint planning, answering these vital questions:

- Can we make commitments for our team?
- Is the work equally distributed among team members?
- Are we estimating the work appropriately?

Just as the Sprint Coaching Report tells the story of the sprint just past, the Capacity Planning Report tells the story of the sprint to come. It's a valuable resource that not only facilitates practical task management and story assignments for the team but also provides insights from past sprints to help the team determine what they can realistically take on.



[Figure 5 - Capacity Planning Report - Gathers current and historical information Scrum Masters need for effective sprint planning]

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The Capacity Planning Report includes the following charts and graphs, among others:

- **Average Velocity Last Five Sprints** - These are the accepted story points the team completed during the previous five sprints — a valid predictor of what the team can realistically commit to this sprint.
- **Sprint Task Load** - A roll-up of team capacity, hours team members have already committed to other tasks, adjusted capacity, the task hours currently loaded for this sprint, and actual hours spent on tasks. As a sprint commences, this chart is continually updated, offering real-time sprint status.
- **Available Team Capacity** - At a glance, lets you know whether your team is over or under-allocated, and by how much. Most capacity planning activities center around using the Sprint Task Load data to equalize the Available Capacity numbers.
- **Individual Team Members** - The bottom section of the report breaks down each team member with allocation percentages, available capacity, assigned tasks, actual hours to complete tasks, remaining tasks in hours, and remaining capacity. These numbers should start as close to equal as possible, but offer a fair warning of reallocation needs as the sprint progresses.

Team Burndown and Velocity by Team (Trend) Reports

These classic Agile artifacts are not unique to Jira Align, but they're present and accounted for as an Agile practitioner would expect. Both of these simple reports will be routinely referenced by Scrum Masters, team leads, and Product Owners both as real-time and historical documents of team performance:

- **The Team Burndown Report** highlights the number of story points assigned to the team for a given sprint, the stories completed, and those remaining to be completed by the sprint's end. It provides a high-level understanding of whether the work for a sprint is on track. It may be beneficial to review the report with team members and stakeholders during sprint retrospectives and daily standup meetings.
- **The Velocity by Team (Trend) Report** aggregates the same necessary information, but in terms of how well the team has historically completed stories in each sprint compared to what was expected. It is beneficial to review the report regularly to assist in making future work commitments for highly predictable teams and identify any negative trends early.

[Figure 6 - Velocity Trend Report - Compares actual story completion based on expected]

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How Jira Align Ties the Program Level (Team of Teams) into the Full Enterprise

The last section was focused on the team level, and we noted two vital steps in establishing and maintaining Agile at scale:

- “Executives must effectively communicate the strategic initiatives coming down to those teams and that strategy must guide their daily activity.”
- “Likewise, all the data generated as team members do the work needs to filter up to stakeholders at each level so they can make decisions, adjust steering, and verify success.”

As we move up the pyramid, we arrive at the program level (aka the “team of teams”). The leaders operating here are primarily responsible for those two vital steps, and Jira Align’s reporting capabilities can enhance their abilities.

Which Stakeholders Will Benefit From Program Level Reporting in Jira Align?

As with the team level reports, the whole organization benefits from the flow of information facilitated at the program level. However, these roles will likely spend the most time with the specific program level reports we’ll discuss below:

- Program Managers
- Release Train Engineers (RTEs)
- Portfolio Managers
- Scrum Masters (occasionally)

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Program Managers and RTEs are usually responsible for making feature commitments during each planning increment (PI), much like the Scrum Master at the individual team level. So, they must be able to access accurate and timely data that are rolled up from each team, both historically and in real-time. They're also responsible for reporting to Portfolio Managers and sometimes executives, so access to this information needs to be quick, efficient, accurate, and easy to communicate.

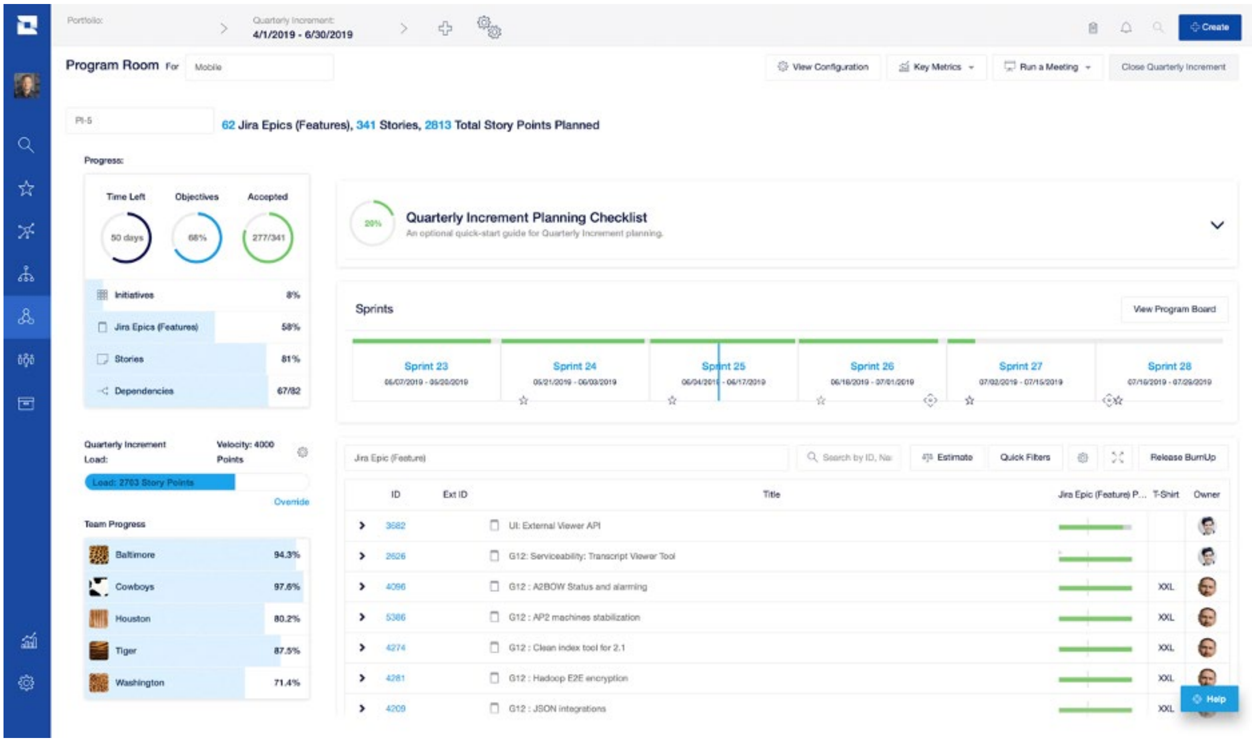
As we look into some specific program level reports, we'll highlight how these individuals can get the most out of them using Jira Align.

Examples of Popular Program Level Reports in Jira Align

Jira Align users leverage the following reports to monitor program level activity across one or more sprints or PIs. Again, there are many more reports available beyond the few we'll be discussing here.

For a thorough explanation of all 53 program level reports, check out this Jira Align support documentation.

Program Room



[Figure 7 - Program Room - Provides comprehensive dashboard across a full program of activity, including PI Planning, PI defect trends, cross-team dependencies, and more]

Much like its counterpart at the team level, the Program Room provides a centralized dashboard that offers clear insight across a full program of activity. Program Managers will especially value this set of complementary reports and views, although stakeholders at all levels will find it useful.

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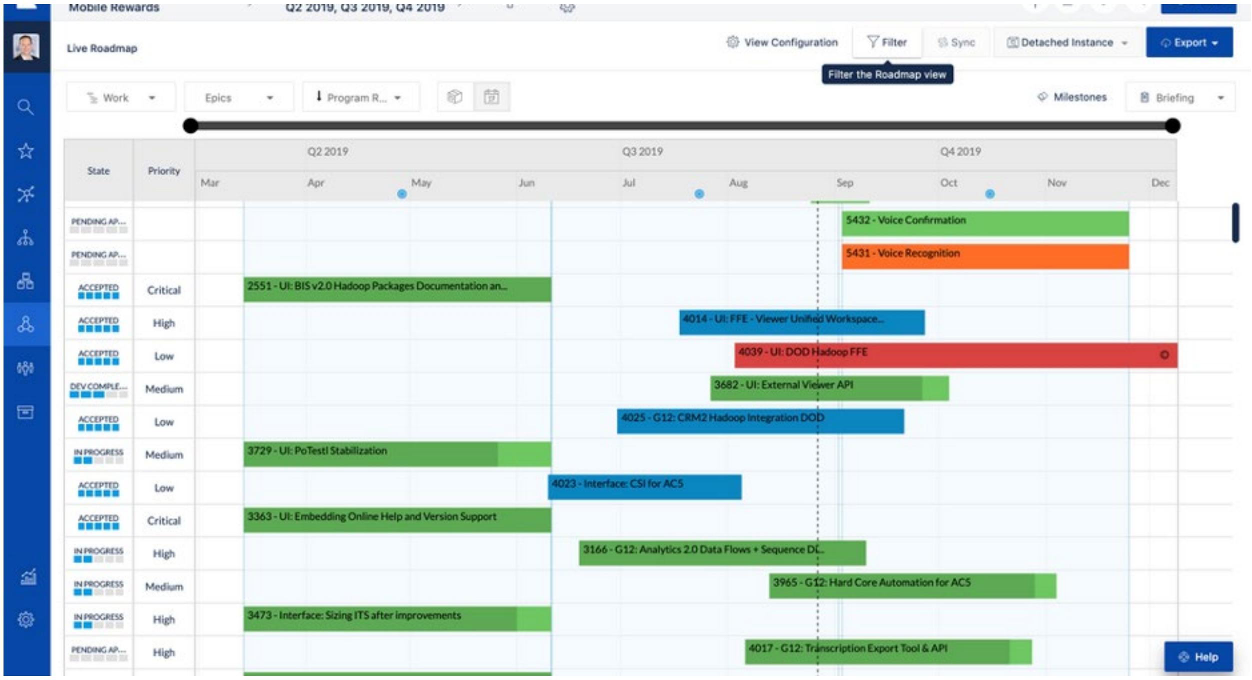
A vital function of the Program Room is to make PI planning and monitoring easy and intuitive. The PI Planning Checklist, for instance, is a powerful planning tool that can walk you through the sometimes complex process of planning a PI. You can customize the checklist to your organization's unique PI planning needs.

Access current and planned work using dozens of views and filters to drill down as needed, to maximize the value of current and future efforts:

- PI burndown and burn-up
- Group velocity
- Velocity by certainty/complexity
- PI defect trends
- Program objectives
- Cross-team dependencies
- Plus, everything WIP-related available in the Team Room

Roadmaps



[Figure 8 - Roadmaps - Allows planning and alignment of work with larger strategic initiatives and provides health monitor for guiding ongoing effort]

Roadmaps offer some of the most versatile and useful options available in Jira Align. While it's categorized as a program level feature, the Roadmaps can be very useful to stakeholders at all levels, including Scrum Masters, Product Owners, Product, Program, and Portfolio Managers, and executive leadership. They effectively support both top-down and bottom-up views of each PI, but other views can span multiple PIs and release vehicles as well.

As a planning tool, the Roadmap allows practitioners to plan and align work with larger strategic initiatives. And, it serves as a valuable health monitor for the steering of ongoing effort. It's also especially helpful because it's highly visual and provides a snapshot of all current epics for the PI on one screen.

From a product management perspective, the Roadmap offers a powerful means of aligning the product vision and strategy with what you know about the customer. By doing so, it becomes easier to vet, prioritize, and hone ideas from multiple inputs. Each can be placed in the Roadmap to see how it stacks up against everything else that's been built, is in progress, or is planned for the future. Then, if necessary, decisions can be made to pivot or reprioritize based on new input.

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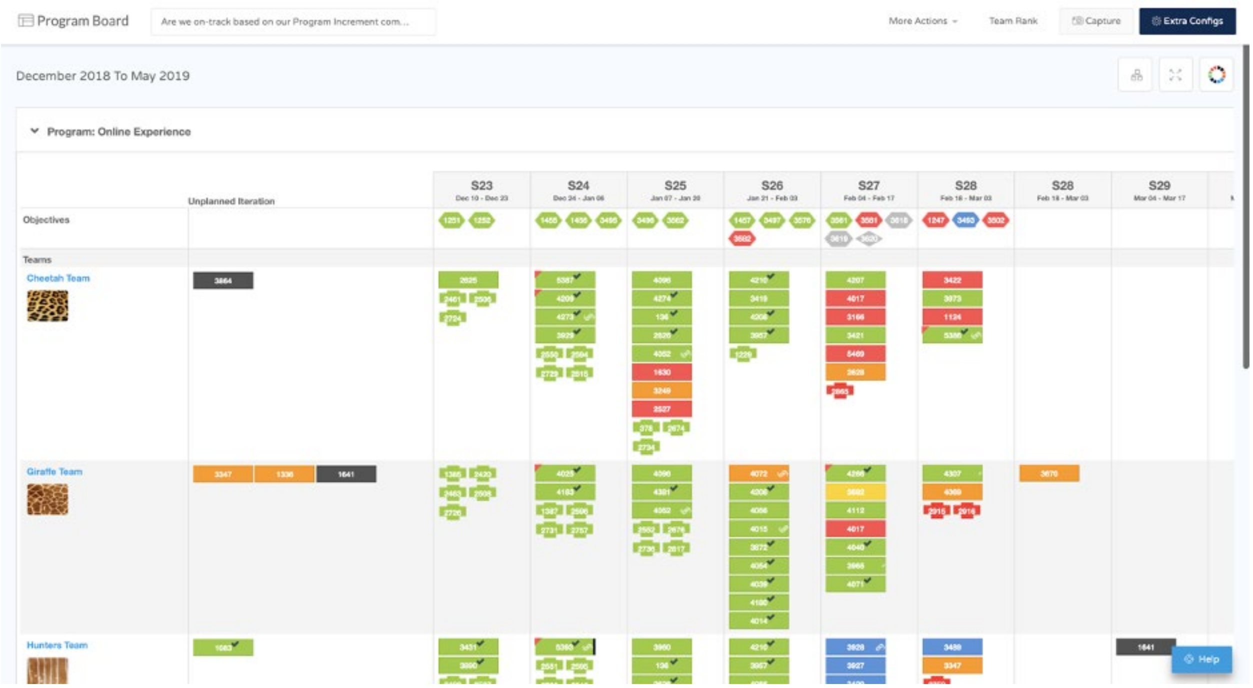
Program Board



[Figure 9 - Program Board - Displays the status of Features, Dependencies, Objectives, and Milestones all on one view]

Less a specific report and more a living document, the Program Board is a highly visual tool representing an agreement between product management and development teams as to what functionality will be delivered at various points of the upcoming or current PI. It's an excellent tool to use during planning meetings but becomes critical for Program Managers and RTEs during the execution of the PI.

From the Program Board, you can plan out all the features and related stories across an entire program and multiple PIs, if needed. Move features across sprints to help visualize when a team needs to deliver their stories or stand-alone features to keep the whole program plan on track. Then, as work commences, the Program Board displays a continually updated status of features, dependencies, objectives, and milestones.

Since there's a lot of data consolidated on the Program Board, it's been made to be highly customizable. Use filters to focus on just the teams and increments in which you're most interested. It's also available in three distinct views, each with its own level of detail.

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Program Velocity (Portfolio Program Predictability Report)

The Program Velocity Report offers a combined analysis of the entire team of teams' velocity across one or more sprints within the same PI. Program Managers, Portfolio Managers, RTEs, and even Scrum Masters can dig into this valuable report to get a high-level view of predictability:

- Are the teams consistently meeting or exceeding their commitments?
- Are there outlier teams that need coaching to improve?
- Or, does the evidence reveal problems with planning at a higher level?

Monitoring velocity across teams and over time allows stakeholders to plan with confidence, knowing what all the representative teams have historically been able to take on. While the concept of a velocity report certainly isn't new, standard Jira only offers it at the team or project level. This report adds a dimension that effectively connects teams to the program.

The report includes burn down and burn up views across all the teams in the program, and you can drill down to the team level as needed.

Program Allocation

The Program Allocation Report is designed to confirm that the workload is evenly distributed across teams and time. To accomplish this, it displays story point allocations and actual performance across teams, sprints, and PIs within the program. With simple color-coding, a Program Manager or RTE can gauge how many story points can be allocated based on known capacity, and how well the best-laid plans are working out in real-time, and adjust if necessary.

This report is going to be valuable for planning and execution. When planning, a Program Manager will want to review historical insights and look into the known capacity for the PI:

- How many points has a team historically completed per sprint or PI?
- Is anyone going to be out of the office or otherwise unable to carry their normal share of that workload?
- Are there any other teams that can take up the slack to balance out capacity? Will the number of stories to be completed in an upcoming sprint or PI need to be adjusted to compensate?

All the teams working on a sprint or program together don't need to be allocated equally. Ideally, they work will be allocated in line with historical performance so that the overall PI workload can be reliably completed. Of course, if certain teams don't seem to be "pulling their weight" over the long run, coaching and implementation of stretch goals can be handled at the team level so that overall productivity improvements are possible.

Estimation Trend (Program Planning Accuracy)

[Figure 10 - Estimation Trend - Compares the total number of story points and value points planned over a specified time period vs what was delivered and accepted]

The Estimation Trend Report uses bar charts to compare the total number of story points and value points planned over a specified time period versus what was delivered and accepted. It naturally works hand-in-hand with the Program Allocation and Program Velocity Reports to assist Program Managers, RTEs, or others in making future work commitments and identifying any negative trends early.

It's also helpful to review this report at the end of each release (at the program retrospective) to determine how teams are progressing. Ideally, the planned and actual figures should be nearly equal, as that would indicate effective planning. But, at the same time, both values should be trending up over time, at least to the point that the report shows the teams began to complete all planned work consistently. That helps to balance a successful plan with optimal productivity and bears out that the development teams aren't languishing, but getting better over time.

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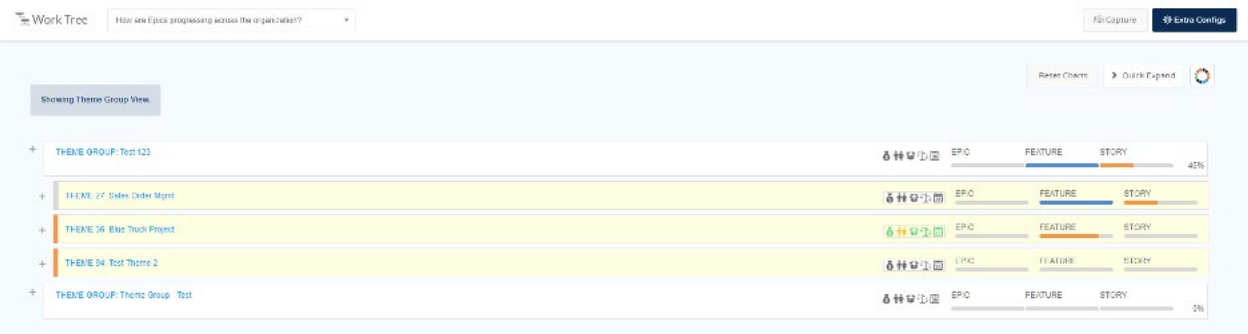
Work Tree Reports



[Figure 11 - Work Tree - Display roll-up and roll-down hierarchies of past, current, and future work across an entire portfolio]

The Work Tree is a collection of five different reports that are invaluable for use at both the program and the portfolio level. The five comprehensive reports are:

1. Strategy
2. Top-Down View (from Epic)
3. Bottom-Up View (from Story)
4. Team
5. Theme Group

As you can probably guess from the titles, the Work Tree Reports show the full power of Jira Align by displaying roll-up and roll-down hierarchies of past, current, and future work across an entire portfolio. They are highly configurable and can provide the 50,000-foot view or a high level of detail in just a few clicks.

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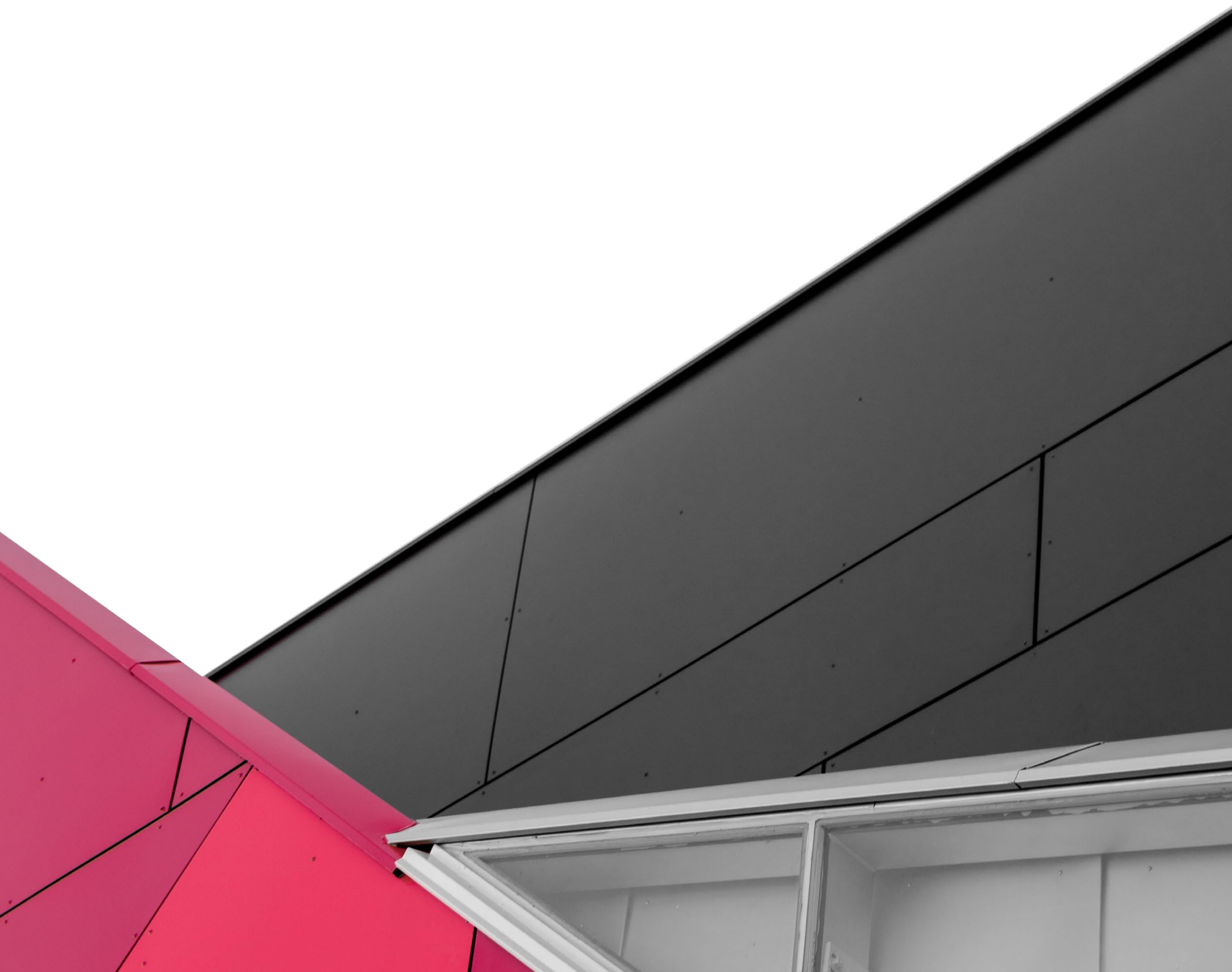
At the program level, Program Managers and RTEs can use the various views to get a comprehensive perspective on all the WIP that falls into their program or release train, as well as what's already planned for the future. Since the reports can either hide or display parent and child stories that are part of a specific program or PI, they can look outside the here and now to better understand...

- Past performance during previous sprints or PIs
- Risks, dependencies, and allocation needs around future work
- WIP progress as it relates to both

We'll cover more of the benefits of this valuable set of reports when, in the next section, we dive into the most popular portfolio level reports available within Jira Align.



How Jira Align Ties the Portfolio Level (Initiatives) into the Full Enterprise

As we've already mentioned, Jira Align was specifically designed to effectively scale an organization's Agile practice from the individual development teams to the enterprise level. It offers unmatched visibility into overarching business goals and strategic planning, as well as day-to-day productivity, unifying every level of the organization so all stakeholders can work from one centralized database.

Successful scaling of Agile depends, to a large extent, on that unification. And, it's at the portfolio level that we find this power displayed most clearly. Just as they did at the program level, leaders at the portfolio level need to facilitate two-way communication to maintain alignment. Jira Align's reporting capabilities can make that possible.

Which Stakeholders Will Benefit From Portfolio Level Reporting in Jira Align?

Stakeholders at every level benefit from a smooth interchange of information and having access to the best data at all times. However, the roles likely to spend the most time with the specific portfolio level reports we'll discuss below include:

- Portfolio Managers
- Executives
- Program Managers (to a lesser degree)

Rather than focusing on individual stories (like a team) or features developed during one planning increment (like a Program Manager), the Portfolio Manager is overseeing an entire solution made up of multiple epics. Each epic is eventually broken down into prioritized features and stories, but the Portfolio Manager doesn't often get that far into the weeds. Instead, their focus is on understanding the large-scale strategic objectives the organization is pursuing and ensuring the various programs making up their portfolio remain aligned with that vision.

As we look into some specific portfolio level reports, we'll consider how Portfolio Managers, especially, can get the most out of them.

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Examples of Popular Portfolio Level Reports in Jira Align

Jira Align contains dozens of pre-formatted reports that offer as broad or granular a view as required based on what you need to understand. Custom reporting can be set up as well if specific insights are required that the available reports don't offer using Atlassian Enterprise Insights or other third-party integrations. (To explore custom reporting in Jira Align, pick up our white paper dedicated to that topic.)

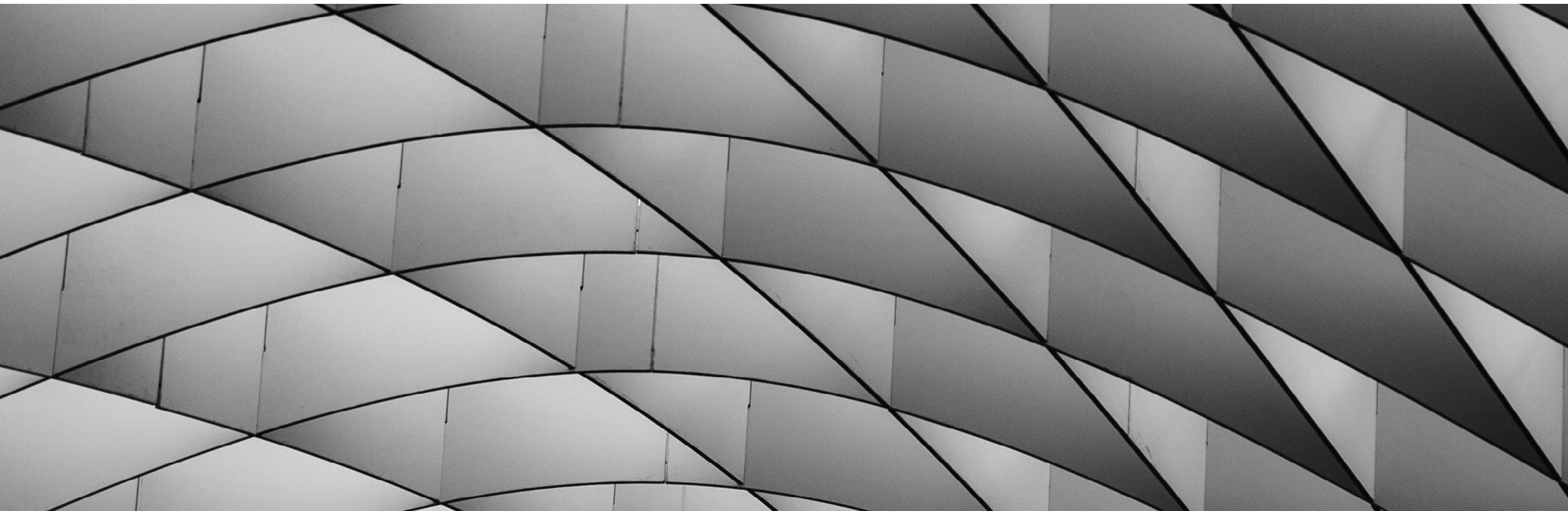
The following are the most popular out-of-the-box reports for effective portfolio management.

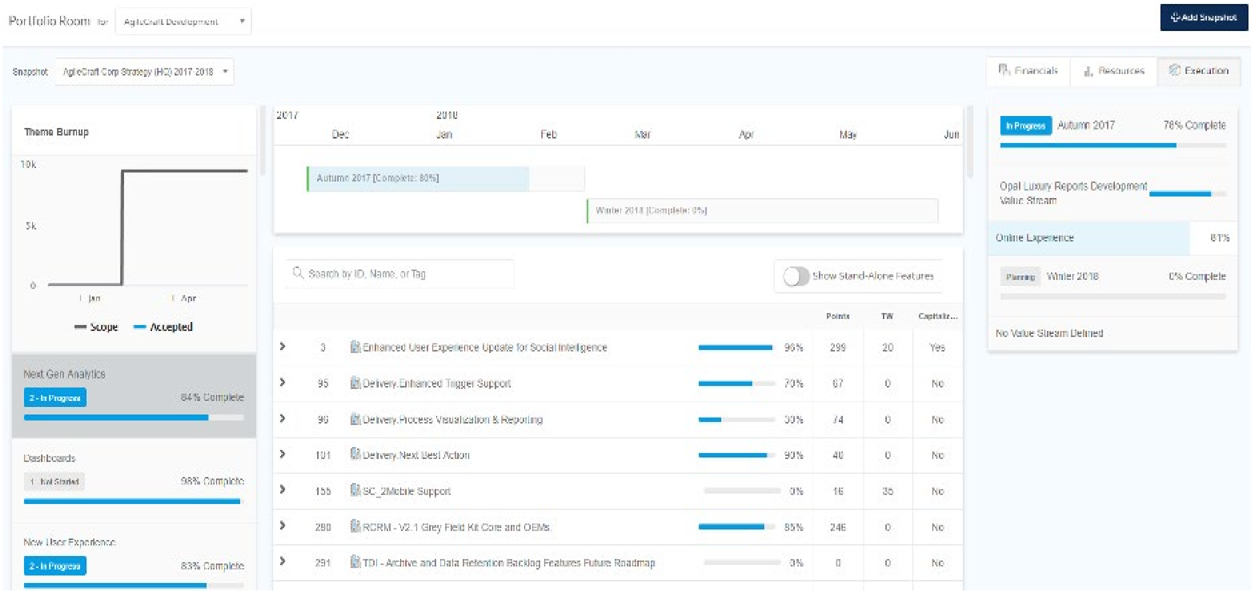
For a thorough explanation of all 22 portfolio level reports, check out this Jira Align support documentation.

Portfolio Room

As noted in the previous section, when discussing the Program Room, the Portfolio Room serves as an optimal "home base" for Portfolio Managers in Jira Align. In this one interconnected set of reports and views, managers will find just about everything they need to carry out their day-to-day tasks, keep their finger on the pulse of the portfolio, and make necessary decisions quickly and confidently:

- Financials - Is the emerging spend aligned with target budgets across the portfolio?
- Resources - Is the emerging scope (down the tree) in line with the higher-level estimates (SWAGs) of effort/size?
- Execution - Is OKR progress tracking against expectations?





[Figure 12 - Portfolio Room - Information radiator that helps the Portfolio Leadership team track decision-making from financials, resources, and execution perspective]

With this information, Portfolio Managers can:

- Refine the business strategy and allocate budget to strategic investment themes
- Define and fund value streams
- Identify, prioritize, authorize, and fund epics
- Adjust staffing levels of programs up to three PIs into the future to match the expected demand based on epic backlogs
- Provide governance of execution across the portfolio's value streams

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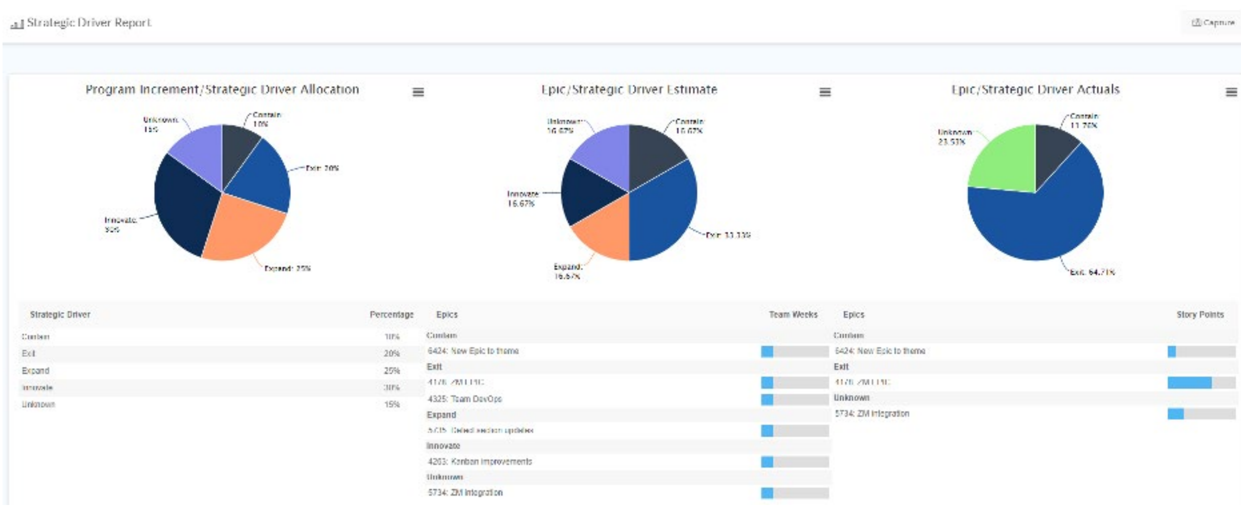
Strategic Driver Allocation



[Figure 13 - Strategic Driver - Provides a visual comparison of work in the strategic plan vs WIP and planned work]

The Strategic Driver Allocation Report allows Portfolio Managers or executives to quickly assess whether the planned strategic allocation of the work is aligned with the work the teams are actually doing or planning on doing. This informs planning and supports alignment top-down from the strategic level with a direct impact on important KPIs including revenue.

The report shows three pie charts that are PI-specific:

1. **Program Increment/Strategic Driver Allocation** - a breakdown of planned allocation for each strategic driver
2. **Epic/Strategic Driver Estimate** - the planned allocation, in team-weeks, based on what has been estimated for every epic associated with the strategic driver
3. **Epic/Strategic Driver Actuals** - a bottom-up calculation reflecting accepted story points from all associated epics within each strategic driver

Additionally, users can view the same information in the form of a list of epics (which is not PI-specific) sorted from most allocation to least.

Reviewing this report regularly will ensure leaders identify any negative trends early and can make the necessary adjustments.

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Epic Progress by State Step

[Figure 14 - Epic Progress by State/Step - Provides a visual snapshot of work in progress at the portfolio and program levels]

Pulling back from the past and future visibility for a moment, the Epic Progress by State Report provides a highly visual snapshot of work in progress (WIP) at the portfolio and program levels. Both epics and stand-alone features are broken down by their current state (started, in progress, ready, etc.) and process step (assigned, in development, in review, etc.)

This can quickly and effectively highlight risks and bottlenecks that could be overlooked at the team level throughout a PI. The chart is especially useful for Portfolio Managers, Program Managers, or RTEs for predicting when WIP will be completed, offering a high-level understanding of whether the work for a PI is on track. Users can filter the report by PI, program, release vehicle, theme group, and Scrum Masters/Product Owners.

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Work Tree Reports

We covered the Work Tree Reports in detail in the previous section but wanted to include them here as well because they are just as important and valuable to Portfolio Managers.

As noted previously, the Work Tree Reports highlight how Jira Align shines through its unmatched aggregation of data from all levels of the organization. Parent/child relationships are mapped out from the theme level down to individual stories, showing how the progress of each impacts the rest of the organization. WIP updates in near real-time, so adjustments can be made on the fly as needed.

This thorough visibility into the data is priceless for Portfolio Managers who want a comprehensive perspective on all the WIP that falls into their portfolio, progress being made toward established OKRs and strategic initiatives, and what's already planned for the future. Beyond the apparent benefits for managing WIP, planning ahead, and understanding historic trends, the Work Tree Reports also provide Portfolio Managers with quick, accurate, and easily digestible status updates for executives with just a few clicks.

In the last section, we'll explore the most popular executive level reports available within Jira Align.

How Jira Align Offers Enterprise Executives the High-Level Insight They Need

The first section of this paper was focused on the team level, and the second discussed the "team of teams" or program level. In the third section, we explored even higher up the pyramid, to the portfolio level. At the very pinnacle of the enterprise hierarchy, we come to the executive level. Let's not forget the two vital steps in establishing and maintaining Agile at scale:

1. Effective, two-way communication
2. Universal access to accurate data

It's the responsibility of the C-suite and their cadre of VPs to answer the really big questions:

- Why does this business exist?
- What are we striving to achieve?
- What are our most important goals this year?

But, if the answers to those questions aren't recorded and shared with the entire enterprise, they're not going to guide day-to-day operations or decision-making. Additionally, just as they did at the portfolio level, leaders at the executive level need to facilitate two-way communication to maintain alignment. Jira Align's reporting capabilities can make that possible.

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Which Stakeholders Will Benefit From Executive Level Reporting in Jira Align?

Stakeholders at every level benefit from a smooth interchange of information and having access to the best data at all times. However, the roles likely to spend the most time with the specific enterprise-level reports we'll discuss below include:

- Executives
- Portfolio Managers (to a lesser degree)
- Program Managers (rarely)

Rather than focusing on individual planning increments (like a Program Manager), or even multi-epic features (like the Portfolio Manager), executives are looking for a bird's eye view of everything going on in the business, broken down by strategic themes and initiatives. These are further broken down into solutions or features, which likely include multiple epics. Each epic is made up of prioritized stories, but the executives can't afford to get too granular. Instead, their focus is on developing the large-scale strategic objectives the organization is pursuing and keeping their finger on the pulse of operations to make sure the various portfolios making up the business remain aligned with that vision.

As we look into some specific executive level reports, we'll consider how these busy executives can get the most out of them using Jira Align.

Examples of Popular Executive Level Reports in Jira Align

The following are the most popular out-of-the-box reports for effectively steering enterprise strategy.

For a thorough explanation of all 13 enterprise-level reports, check out this Jira Align support documentation.

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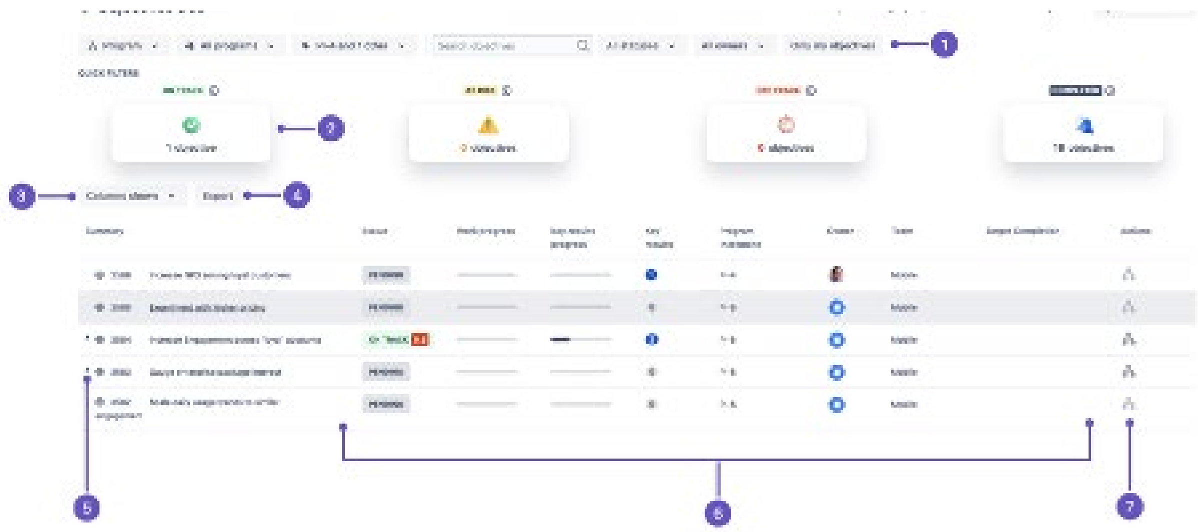
Objectives Tree



[Figure 15 - Objectives Tree - Helps to visualize the relationship between objectives and goals set at the different levels of the organization]

Executives will be thrilled to access these powerful views that follow established OKRs and strategic initiatives across all levels of the organization, providing as much drilled-down detail as desired.

Beginning at the top of the strategic hierarchy, every objective living in the system can be found nestled within the familiar parent-child tree, either in a list or visual format. As objectives are scored and work progresses, the Objectives Tree offers a quick and rich view of progress against key results at every level, down to individual teams.

This report provides valuable insight into WIP, but it’s also a powerful tool to support agile decision-making when circumstances require reprioritization, reallocation of resources, or large-scale product-, program- or portfolio-wide realignment. It also offers a quick and efficient way to identify how various value streams and themes compare and contrast within and between more significant strategic initiatives. And, it can be used to evaluate the OKRs themselves (and scoring methods being used) through the lens of past and ongoing performance.

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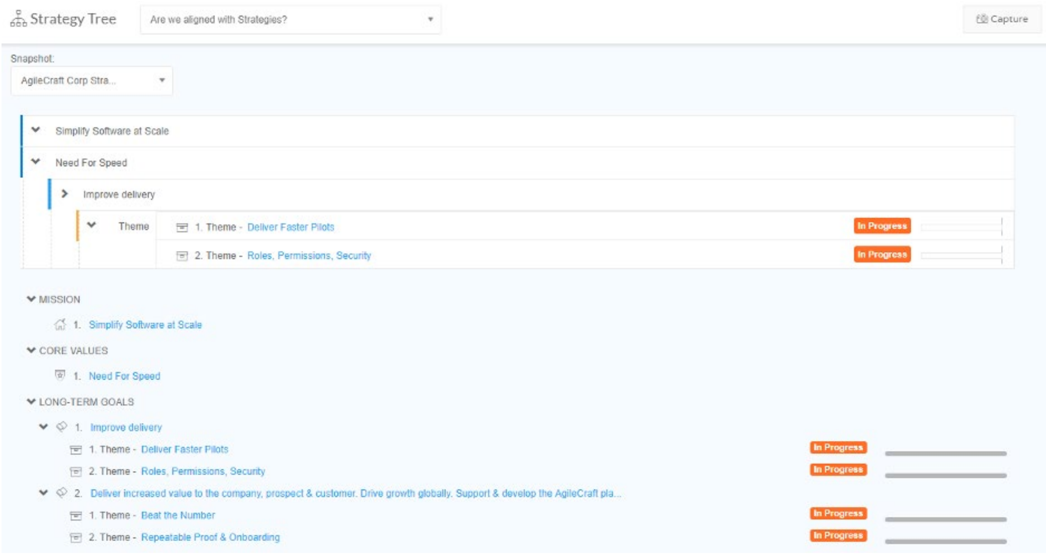
Strategy Tree



[Figure 16 - Strategy Tree - Provides a high-level summary of the mission, vision, values, goals, and themes established for the business]

The Strategy Tree Report provides a quick, high-level summary of the mission, vision, values, goals, and themes established for the business. The relationship between each is made clear through a nested dropdown list.

Executives at the enterprise level love this report because it displays the organization's strategic superstructure, and highlights how the overall enterprise strategy drives all lines of business. This high-level view—visually focused by the nested structure—is just the kind of quick but thorough source busy executives need to stay on top of a fast-moving enterprise workflow.

Access to a clear, concise record of the mission, vision, values, goals, and themes everyone should be working toward is essential to alignment within an organization. They provide purpose to the staff and the work they are performing and act as the catalyst for further planning and strategy development.

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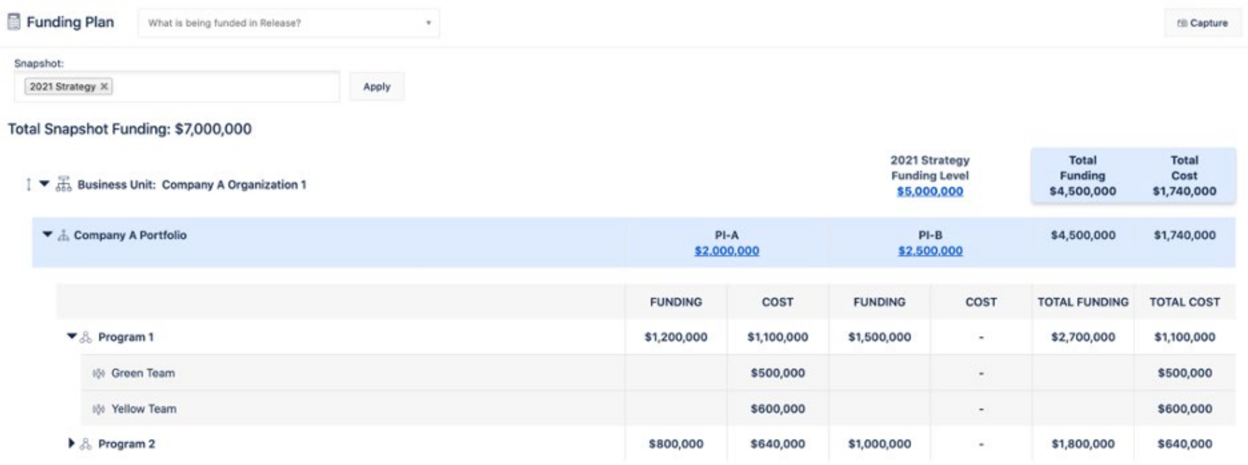
Funding Plan



[Figure 17 - Funding Plan Report - Shows investment distribution breakdown for work items associated with themes, epics, capabilities, features, and more]

The Funding Plan Report provides a real-time financial snapshot of a subset of the organization, so executives can track funding levels against allocation, and view progress through the lens of the organization structure hierarchy, instead of the usual program-based view. This promotes enterprise alignment around organizational accountability and financial responsibilities.

The report shows funding and costs from one or more selected snapshots, down to portfolio, program, and PI allocations, so executives can effectively manage funding levels in context and manage the costs spent against the allocated funding levels.

For example, this allows leadership to:

- Consider adding teams or work when program and PI funding are not tracking toward the total snapshot funding
- Manage the risk of cost overrun when one or more PIs run over the allocated funding levels
- Analyze PI cost as sprints are completed

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Status Reports

Status Reports is a set of interrelated reports:

1. Financial View
2. Status View
3. Epic / Standalone Feature (within Status and Financial views)
4. Capability (within Status and Financial views)

The purpose of the Status Reports is to offer executives and the organization's PMO a comprehensive data table for use when they need to evaluate schedule, budget, risk, scope, quality, and progress of WIP. It's not just a powerful report for stakeholders to access as needed, but it can save Product and Portfolio Managers tremendous time in creating their own weekly or monthly status reports for their bosses, freeing them up to add more value in other ways.

1. Financial View

The Status Report (Financial View) is a roll-up of WIP at multiple levels of detail: by the organization, portfolio, program, theme, program increment, release vehicle, and epic.

The report displays the hierarchy: enterprise, portfolio, program, prioritized initiatives, and totals. It focuses on the financial statement but also shows due dates and health status of work items like epics and features. It can be filtered by PI dates or a specific date range. Or, set PI selection to All, and the report will filter by program instead.

Executives can use this data to review the overall status of a theme, portfolio, or program, with a primary focus on the budget.

2. Status View

The Status view focuses on a list of initiatives with health indicators but also tracks budget, personnel, quality, risk, and schedule for each initiative. Like the Financial View, the report can be filtered by specific PI dates, a date range, or a program.

Executives can use this data to review the overall status of a theme, portfolio, or program, with a primary focus on the health status of WIP.

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3. Epic/Standalone Feature

The Epic/Standalone Feature drills down into the Status Report's main views, Financial and Status. The report isolates specific epics and stand-alone features that are tied to portfolios.

Executives can use this report to review the overall status of epics and stand-alone features in a portfolio. Primarily, the epic report focuses on the epic's acceptance and success criteria, objectives, risks, dependencies, capabilities, features, and stories. This level of detail can be of benefit to Product and Program Managers as well.

4. Capability

Like the Epic/Standalone Feature Report, the Capabilities Report drills down on the Status Report main views, Financial and Status. In this case, however, the report isolates specific capabilities that are tied to the portfolios.

The data in this report provides an overall status of capabilities in a portfolio. The primary focus, in this case, is on the acceptance and success criteria, objectives, risks, and dependencies the capabilities have, as well as the features associated with each capability.

If you'd like to learn more about how Jira Align can help your organization, contact us today.

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50	250+	20+
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