White Paper: Implementing SAFe® with BigPicture

SAFe® Jira and BigPicture Preconfiguration
For an agile, flexibility-oriented approach that cultivates a fluid work culture and behavior and fosters self-organization, the Scaled Agile Framework® introduces a very formal work structure, and a strict terminology, that may almost seem counterintuitive to agile. Offering to organize work of agile teams into a neat order by breaking down the scope into elements of different sizes, from the most significant objectives down to the most minute of details, the framework lays out a structured four-tier hierarchy:

1. **Story**, being the smallest bit, is understood as a small body of work that is shippable over the course of an iteration. Stories are often thought of as ‘requirements’ or ‘requests’ from the user which are small enough for a team to commit to implementing them in a single sprint.

2. **Feature**, a bigger chunk of work defined as ‘a service that fulfills a stakeholder need’. Features should be sized in such a way to guarantee that they can be delivered by a single Agile Release Train (ART) in a single Program Increment (PI).

3. **Capability**, yet a bigger element that is — according to the definition offered by Scaled Agile Inc — a higher-level solution that typically spans multiple ARTs.” Capabilities are broken into multiple ‘Features’ to facilitate their implementation in a single PI.

4. **Epic**, lying at the very top of the SAFe work hierarchy, is a term to describe a ‘solution development initiative large enough to require analysis, the definition of a Minimum Viable Product (MVP), and financial approval before implementation which occurs over a multiple PIs.

‘Stories’, ‘Features’, ‘Capabilities’ and ‘Epics’ are the key elements to understand the way SAFe® helps teams self-organize and seeks to put into practice the idea of quick and efficient iterative agile development to ensure the delivery of incremental value on a regular and predictable schedule.
DEFINING SAFe® ISSUE TYPES IN JIRA

The first part of your pre-configuration process will be for your Jira to accommodate all elements of the SAFe®-prescribed work structure and mirror the four-tier SAFe® hierarchy: SAFe® Epic -> (SAFe® Capability) -> Feature -> Story.

1. Go to the Jira Administration panel, switch on the ‘Issues’ drop-down menu, and edit issue type ‘Epic’ to re-name it to ‘Feature’ (SAFe® Feature is after all the equivalent of an Epic in Jira).

2. Create a new Jira Project and dub it ‘Initiatives’.

3. Under the newly created Project create two issue types: SAFe® Epic and SAFe® Capability.
All SAFe® issue types — the building blocks of your four-step Scaled Agile® hierarchy — are now set. The default Jira Epics have now become your ‘SAFe® Features’ (please note the resulting convenience of creating quick epic dependencies using the out-of-the-box, drag&drop Jira ‘Epic’ links).

SAFe® ‘Capabilities’ have been added as a separate issue type along with ‘Epics’ which have acquired the ‘SAFe®’ determiner to clearly distinguish them from Jira ‘Epics.’ Last but not least, ‘Stories’ — the smallest issue type defined in the Scaled Agile Framework, has already been there from the start in your default Jira settings.

Your next step will be putting these four elements into the ascending order for establishing a proper SAFe®-predefined hierarchy, which will then be displayed in your Work Breakdown Structure.

4. Set the ‘Feature’ — ‘Capability’ — ‘Feature’ — ‘Story’ hierarchy in BigPicture using the Jira Epic Link. The hierarchy between all other issue types will be built based on parent/child link or any custom link of your choice used to generate the hierarchy.

Your SAFe® ‘Epic’ -> ‘Capability’ -> ‘Feature’ -> ‘Story’ hierarchy is now established.
At times you may want a piece of information relevant to a given 'User Story' to be invisible to your customer. While a 'Story' will refer to customer business value, an underlying subtask or a group of subtasks, required to be completed by your team for this value actually to be delivered, will be of no concern to the customer.

Be it a small refactoring task, back-end code grooming, a change in the production process, etc., this information will be irrelevant to your clients and is best left hidden from their view.

To meet this requirement, it is recommended to enrich the default SAFe® hierarchy with an additional element, which for convenience, we have dubbed 'Technical'. This cannot be achieved by merely renaming Jira 'Subtask' to 'Technical' as 'Subtasks' inherit security level from the 'Story' they originate from. While all your 'Stories' should maintain unhindered visibility, the content of 'Technical' is best restricted to your predefined group of users. To overcome this obstacle:

5. Create a new issue type and name it 'Technical'.

6. Define 'Technical's security level as 'Internal'.

![Add Issue Type](image-url)

![Edit Issue Security Levels](image-url)
No app can be said to be fully SAFe®-compliant if it does not accommodate ‘Objectives’. These items, constituting a compendium of your primary business aims and technical goals are to be met by your team during a given Program Increment.

They have been set during a PI Planning event and then displayed on a Roadmap for all to see and refer to during Program execution. Not only do ‘Objectives’ serve the important purpose of planning and communicating the company strategy, mission and vision, but they also allow visibility into cross-team dependencies, which will need to be coordinated for the Program Increment to be successfully completed.
Create a new project and dub it 'PI Objectives' where an issue type 'Objective' will be defined. I will then be put on your BigPicture Roadmap. (You can also use the built-in 'artificial' objectives in BP, but those will not be visible in your Jira). Then go through the same procedure for Iteration 'Goals'.

7. 'Objectives' and 'Goals' can also make up a hierarchy, with one being defined as the parent of the other via the parent/child Jira link.

8. Use the 'relates to' Jira link to connect Objectives with your SAFe® Features or Stories.

Important: The meaning of this relation should be construed as: "the present Feature/Story implements this Objective/goal". By no means however should this relation be misinterpreted as meaning either "if all related tasks are implemented, the Objective/goal is met", or "if not all related tasks are implemented, the Objective/goal shall not be met".
**KEEPING IT ALL IN SYNC**

To facilitate your work, help retain the bird’s eye view of your project or portfolio of projects (with the visualization of the cross-team and cross-iteration dependencies), and save precious time, it’s best to have it all synchronized between BigPicture in Jira.

Keeping it all in sync will mean whatever has been planned on your BigPicture Roadmap or Board will become instantly visible for your teams on their respective boards in Jira. In just a few simple actions, you can align your BigPicture plans with the Jira Agile Schedule and overcome the limitations resulting from Jira’s lack of teams.

10. You can align your BP PIIs with Jira Program Increments, and your BigPicture Iterations with Jira Sprints, by customizing your Scope Synchronization template to enable automated synchronization of PIIs & Iterations.

11. To make sure specific tasks you’ve planned on your BigPicture Board will remain properly assigned to teams in Jira, synchronize BP Teams with a custom field Team.

Becoming an agile organization is a substantial effort, but one that comes with a significant reward. It allows greater flexibility and ability to respond to change faster and more constructively.

It brings the advantage of being able to use fewer resources, eliminate waste, and deliver customer value on a predictable schedule. The right tools can truly assist in introducing and applying the framework.

With your Jira + BigPicture duo of complementary apps adequately configured for the application of the SAFe®, you can quickly move on to start reaping the benefits across your organization.
SoftwarePlant was founded in 2015. Now, only a few years later, our suite of Product and Project Portfolio Management products have been tried and tested, and found favor with over three million users around the globe.

With close to 17,000 teams, from start-ups to Fortune 500 companies, using our solutions every day, we are convinced that our success has been possible due to an unbeatable combination of four factors: modern thinking, a love for technology, meticulous attention to quality, and a drive for constant improvement.

SAFe® PLATFORM PARTNER
Scaled Agile Framework is one of the most complete and mature PM methodologies inspiring the development of our products.

ATLASSIAN PLATINUM TOP VENDOR
All of our plugins have been through a rigorous review process by Atlassian, who holds vendors to high standards for add-on traction and reliability.

OUTSTANDING SUPPORT
Customers are the focus of our attention, which is why we place great emphasis on competent and timely support.

30-DAY MONEY BACK GUARANTEE
If for some reason our products do not satisfy your needs, let us know and we’ll refund you without any hassle!