WIKI

https://ddi-alliance.atlassian.net/wiki/display/DDI4/DDI+Home

The Wiki site for your group is located within the section DDI Committees & Working Groups or DDI Moving Forward. DDI Committees & Working Groups are those that pertain broadly to the on-going activities and products of the Scientific Board. These currently include:

* Technical Committee
* Marketing and Partnerships
* Training Group
* Publications
* Web Group
* Controlled Vocabularies Group
* Documentation Group
* Data Description in R Group
* DDI Workflow for Dataverse

DDI Moving Forward is a project of the Scientific Board focused on the initial creation of the next generation of DDI. The working groups in Moving Forward exist for the period required to complete the development work in a specific area. The Modeling Team is the central team which continues through the life of the project. The Moving Forward Project is guided by an Advisory Group.

The individual Wiki sites have a common set of purposes. These include capturing the work of the group to facilitate completing their tasks, ensuring that documents generated during their work are retained and available, serve as a source of information to the DDI community on the current work of the DDI Alliance Scientific Board, and provide transparency on the development and work processes of the Alliance. To facilitate ease of navigation, each site has a general format which covers the following sets of information:

* Home Page
	+ Role/Purpose – statement of the purpose and possible goals of the group
	+ Link to Minutes of the group and other regularly produced reports
	+ Link to the JIRA issue tracker(s) associated with the group
	+ Meeting time and connection information
	+ List of Members
	+ Documents of interest – these may be finalized decision documents or drafts of documents under construction
* Minutes page
	+ Minutes are listed with most recent at the top and use the ISO date structure
	+ Normally entered as page content using the Expand feature to make it easier to locate minutes from a specific date

Individual pages will vary, particularly for on-going groups. The home page should provide basic information on the purpose, contact information, current activities, and priorities of the group for anyone from the DDI community. Clear links to subpages and important documents are provided from the home page. There should be consistency in the general look and feel of the pages for all groups to make it easy for non-group members to easily navigate between the wiki sites of the various groups. Variation on specific content between wiki sites is often necessary to support the work of the group, but general similarities should be maintained.

# Editing the WIKI

***All editing EXCEPT checking off tasks is done in “Edit” mode (link on upper left of the page IF you are logged in).***

## Adding Minutes on the Minutes page:

* Use Expand
* Label of Expand should include the date in ISO structure with or without hyphens (ex. YYYYMMDD 20161031 or 2016-10-31)
* Current minutes go at the top

## General pages

***The following editing directions apply to changes in the Home page or adding child pages***

* The title can be entered directly
* All other content should be entered within sections and within some form of box rather than free form unless you are creating a page that holds a document

To add structural content place cursor on the appropriate point of the page and enter “{“. This will bring up a dropdown box of options. Select last one “Open macro browser”. Within the macro browser type the word for the macro type (common ones below) to jump to type. Try to keep to common set.

Sections (click on image)

* Add a new section
* Identify the layout of the section
* Content should be places within defined boxes. Default boxes include:
	+ Information (blue)
	+ Warning (red)
	+ Tip (green)
	+ Note (yellow)
* Panel (box with a defined title section which may have a different color from the box)
	+ Outline type = solid
	+ Color = use basic colors [red, blue, yellow, green, etc.] if using “light” color enter as one word “lightgreen”
	+ Weight of border
		- 1 = very fine
		- 2 = normal
		- 3 = heavy [use this if you want to catch reader’s attention]
* Tables can be created from the top tool bar. Select the number of column as rows and hit enter. Table structure has a dropdown tool bar that allows you to add or remove columns or rows like Excel.
* Attachments can be made to the attachment page invisibly using the “…” icon on the upper right. Browse or drag-and-drop options.
	+ To make this visible create a box and add the content “Attachment”
* Hyperlinks
	+ Highlight content and click on chain-link image on toolbar
	+ Option box allows you to search, add a web link, a document, or see a list of recently viewed sites
	+ You can edit the text associated with the link at the bottom of the option box
	+ Highlight and right click an existing hyperlink for options to “go to”, “edit”, or “remove”

**Basic Editing Tools**



The Editing Toolbar contains basic text format items including:

* Paragraph – font sizes
* Bold, Italics, Underline
* Font color
* Font style – strikethrough, subscript, superscript, monospace
* Bullets
* Numbers
* Indent (right and left)
* Alignment options

Special items include the ability to create a check list. This feature can be added to any box and lets you list a task (in edit mode) with a preceding tick box and then check it off without going into edit mode.

Other standard options include

* Section (described separately)
* Insert picture
* Hyperlink
* Table
* Undo / Redo

The “+” dropdown contains a few commonly used format features, which may be time savers.

JIRA

https://ddi-alliance.atlassian.net/secure/BrowseProjects.jspa?selectedCategory=all&selectedProjectType=all

The JIRA issue tracker needs to be used consistently to be the most effective for both your group and for others in the DDI Alliance. General guidelines include:

* Log in prior to entering issues (this will link your name to the issue)
* All issues requiring action should be listed in JIRA
	+ If unsure of which project to file the issue in, file it in DDI Views General (DVG). It will be reviewed and moved to the appropriate project(s)
	+ https://ddi-alliance.atlassian.net/projects/DVG/issues/?filter=allopenissues
* Enter a single issue for each item
* Issues should be stated in a way that it is clear when the item is completed
* Do not provide a label unless you are filing an issue in your own project and are using a known set of labels. Labels used for tracking purposes should be agreed upon between projects.
* A single person should manage JIRA items on a routine basis to either
	+ Review new issues to see if clarification is needed
	+ Prioritize and/or label
	+ Schedule and/or bring to the attention of the group
	+ Organize similar issues by linking
* Inform filer of actions that have been taken (if possible)

## Features of JIRA

* Anyone can create a JIRA Issue
* Persons with JIRA/Wiki login can comment on the issue and attach document
* The Project Lead and individual’s noted as JIRA developers can close an issue
* The Project Lead can assign an issue to an individual; an individual can assign themselves

## Issue type:

* Bug – an error in the model, web page, CV, or whatever is the product of the group
* Task – an activity which the group needs to complete
* New Feature – a suggestion for new coverage or capability
* Improvement – a suggestion that will improve current coverage or capability

## Managing the Workflow

It is important to note the status of an issue as it moves through the review process. DDI tracks the overall progress of groups working through their issues to identify where additional support may be needed. Ideally issues should be classified as open for only a week or two and should be either acknowledged or rejected during that period. A graphic report of on the status of the issues within a project should provide a clear view as to the number of issues resolved, those actively being worked on, and those waiting for action. This report information is useful for the group as well as the DDI Alliance in determining how well work is moving along and when processing approaches might need to be reviewed.

|  |  |  |  |
| --- | --- | --- | --- |
| **Status** | **Transition** | **Decision Meaning** | **Target Status** |
| ---- | Create | The initial status of all issues | Open |
| Open | Acknowledge | The issue has been identified as something the group will address | To Do |
| Reject | The issue has been rejected by the group as bogus [add comment on reason for rejecting] | Done |
| To Do | Begin Work | Work could include assignment to a member to provide additional information; opening discussion; any activity which indicates the group is actively working on this issue. | In Progress |
| In Progress | Is Resolved | A decision has been made on how to handle the issue. Use the list of  | Resolved  |
| Resolved | Entry review | The resolved solution has been entered in Drupal or appropriate location and is ready for review. | In Review |
| In Review | Completed | Review indicates action was taken as resolved and the issue is now closed. | Done |
| Done | Reopen | Allows for reopening the issue in case of error etc. | In Progress |

## Labels:

Labels can be added as a means of filtering issues for viewing or reporting. Prior to using labels, the groups should identify a set of labels that will help them sort or report on their activities in a consistent manner. Guidelines:

* Labels are case specific (i.e. List and list are two separate labels)
* Use only agreed labels for agreed purposes

## Resolution Properties:

Resolution allows you to indicate a general type of resolution. This information can be used in creating reports showing both patterns in resolution actions and in the type of issues being entered into the tracker.

* Done – the task was completed, new feature added, or improvement made
* Duplicate – the issue is a duplicate of another issue and therefore resolved by that issue
	+ Good practice would include adding a link to the issue it duplicates
* Fixed – the bug was corrected
* No action required – the issue required no specific action or notation for working process
* No longer evident – changes in the model, specification, document, etc. has changed since the issue was filed
* Noted – the issue was noted as a comment to the workflow and/or production process
* Not fixable – the issue cannot be fixed
* Referred – the issue has been referred to another group
	+ Good practice would be to use Label to capture the Issue Tracker identifier for the group

## Entering an issue:

You can enter an issue even if you are not logged in but it is good practice to log in so that you are noted as the person who filed the issue.

* Go to JIRA
* Click on CREATE
* Select the project for the issue
* Change Issue type as appropriate
* Change priority if required
* Provide a clear summary line
* Describe the issue as clearly as possible (if you do not have a log in provide your name)
* Attach any documents required to support your issue

## Additional Management Hints:

If your group is filing several issues in someone else’s project and you want to track their progress you can label the issue you file and then create a report on the status of the other group’s issues using the label as a filter. The Technical Committee (TC) uses this approach to track the status of issues assigned to individual working groups during a development review.

* Assign a consistent label to the issue in the other groups project (i.e. the label D4Q2 used by the TC in assigning issues from the 2016 Q2 review)
* Note that groups have their own sets of label to help them manage their work, so inform them that you have added this label to track general progress on these issues
* Create a report for a dashboard that can be reviewed periodically