

Analyst Portfolio Project

Getting Smart with Jira and
Confluence

This is a presentation of how I used Jira and Confluence to manage my own personal project.

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Overview

Even though I am the only person working on this project, it is important that I hold myself accountable for the work to be done.

Objective: Two birds, one stone. Gain hands-on experience with an industry tool while managing value delivery for my portfolio.



After I started working on building my website and analyzing a set of data, I decided that I'd better get a project management system in place to prevent scope creep and help me break down the work to be done. Since Jira is a commonly used product and I had already received basic training for it, I decided to use it to track my project deliverables and schedule.

Project Components

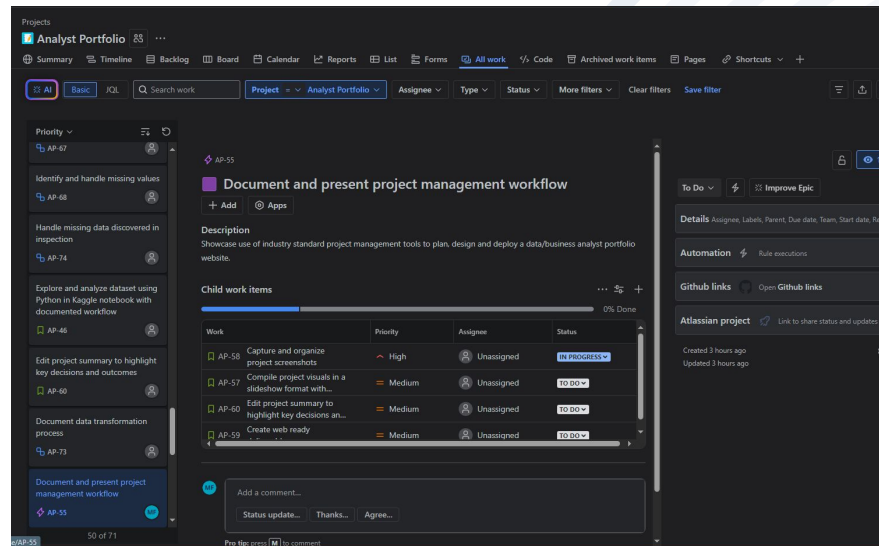
A la Jira



This section includes screenshots of how I record Epics, Stories, Tasks, Subtasks and Bugs.

Epic

The grand narrative of smaller stories and tasks.



When I started building the portfolio project in Jira, I consulted with ChatGPT to verify that I was correctly breaking down the layers of work. I didn't want to be using Jira as a glorified to-do list. Through conversation, ChatGPT helped me understand the relationship between epics, stories and tasks better and we collaborated on verbiage.

Story

- A smaller chunk of the epic
- Description is formatted like a user story
- I added the “Acceptance Criteria” field to help scope the work



AP-37 / AP-44

Import, inspect and clean dataset

+ Add @ Apps

Acceptance Criteria

- ☐ Dataset uploaded to Kaggle notebook.
- ☐ Use Kaggle markdown fields to document actions and findings.
- ☐ Run data cleaning and inspecting commands like

```
1 .head()
2 .describe()
3 .shape()
4 .smallest()
```

Description

As a data analyst, I want to use Kaggle notebook so that I can import a CSV file and use Python code to analyze it.

Priority High

Subtasks 25% Done

Work	Priority	Assignee	Status
AP-68 Identify and handle missing values	Medium	Unassigned	10:00
AP-69 Document actions and findings using Kaggle markdown	Medium	Unassigned	10:00
AP-70 Run data inspection commands	Medium	Unassigned	10:00
AP-71 Upload dataset to Kaggle notebook	Medium	Unassigned	10:00

Linked work items

Items

Item	Priority	Assignee	Status
AP-81 Create new data frame from cleaned and transformed data for analysis	Medium	Unassigned	10:00
AP-82 Explore and analyze dataset using Python in Kaggle notebook with documented workflow	Medium	Unassigned	10:00
AP-83 Summarize Python analysis findings in portfolio-ready format	Medium	Unassigned	10:00
AP-84 Add portfolio deliverables to website	Medium	Unassigned	10:00
AP-85 Visualize Results	Medium	Unassigned	10:00

Implementers

Item	Priority	Assignee	Status
AP-71 Upload dataset to Kaggle notebook	Medium	Unassigned	10:00

Activity

All Comments History Work log

Add a comment...

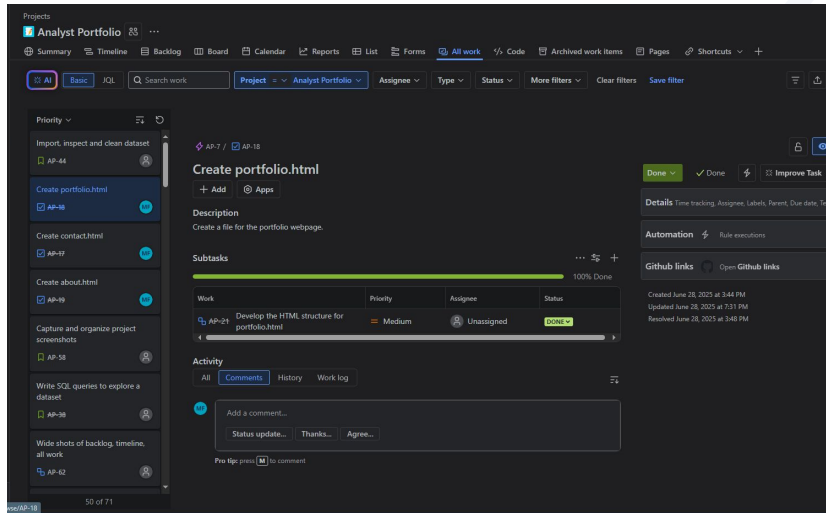
Who is working on this...? Status update... Thanks...

Pre-App (10:00) to comment

My experience as an Emerging Technology Analyst in the Office of Online Services at the IRS taught me the importance of requirements elicitation. As a single-member project team, I need acceptance criteria as part of my stories so that I have a written Definition of Done and visible scope of work. I am susceptible to the black hole of perfectionism and having a checklist that tells me when enough is enough is very handy. If I want to do more, it becomes a new story or task and gets added to the backlog!

Also, formatting the descriptions as user stories helps me scope the work. It simplifies the work into what the feature is, who it's for and how it gives value. This not only helps with scope but also with backlog refinement.

Task



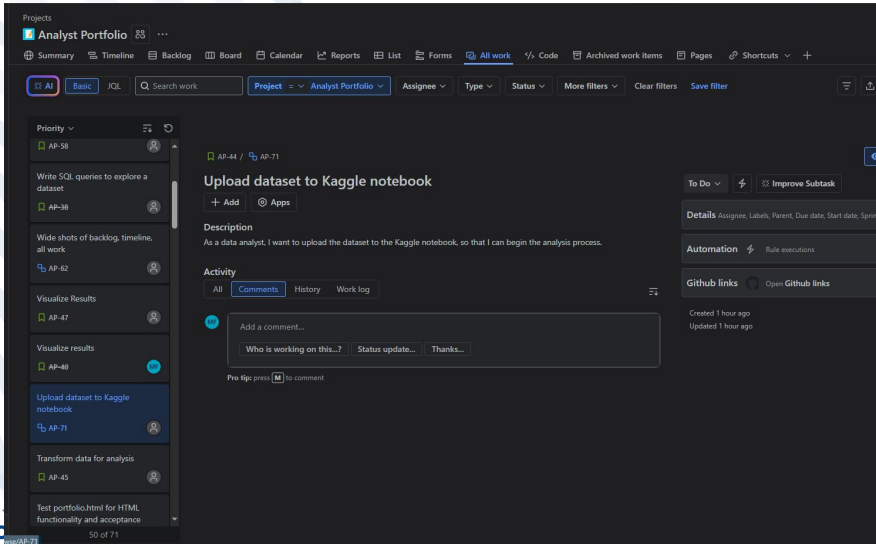
Simple, just a thing to do.

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The slide says it all. 🤖

Subtask

The pieces of work that support meeting the story's acceptance criteria.



Scope of work is very important to project completion. I have a tendency to forget steps and will underestimate the effort needed to get something done. By breaking the stories into subtasks, and collaborating with ChatGPT to make sure I don't forget anything, I am able to appropriately assign myself work in sprints. I have instructed ChatGPT to use the Socratic method with me because I don't like to be handed answers, I like to get to them on my own.

The screenshot displays the Jira 'Analyst Portfolio' interface. On the left, a table lists tasks with columns for Type, Key, Summary, Status, Comments, and Sprint. The tasks include 'Build a website' (IN PROGRESS), 'Fix sticky footer' (DONE), 'Create index.html' (DONE), 'Set up HTML structure' (DONE), 'Style website with CSS' (DONE), 'Create contact.html' (DONE), 'Create portfolio.html' (DONE), 'Create about.html' (DONE), 'Add text content to website' (DONE), 'QA and Deployment' (DONE), and several test tasks (DONE).

The right panel shows the details for the bug 'Fix sticky footer' (AP-7 / AP-82). It includes a description of the issue, a reproduction step, and a section for details, automation, and GitHub links.

Type	Key	Summary	Status	Comments	Sprint
Task	AP-7	Build a website	IN PROGRESS	Add comment	
Task	AP-82	Fix sticky footer	DONE	Add comment	
Task	AP-14	Create index.html	DONE	Add comment	
Task	AP-8	Set up HTML structure	DONE	1 comment	AP Sprint 1
Task	AP-9	Style website with CSS	DONE	Add comment	AP Sprint 2
Task	AP-17	Create contact.html	DONE	Add comment	
Task	AP-18	Create portfolio.html	DONE	Add comment	
Task	AP-19	Create about.html	DONE	Add comment	
Task	AP-41	Add text content to website	DONE	Add comment	AP Sprint 4
Task	AP-11	QA and Deployment	DONE	Add comment	AP Sprint 4
Task	AP-23	Test index.html for HTML functionality and acceptance criteria	DONE	Add comment	AP Sprint 4
Task	AP-24	Test about.html for HTML functionality and acceptance criteria	DONE	Add comment	AP Sprint 4
Task	AP-25	Test portfolio.html for HTML functionality and acceptance criteria	DONE	Add comment	AP Sprint 4
Task	AP-26	Test contact.html for HTML functionality and acceptance criteria	DONE	Add comment	AP Sprint 4
Task	AP-27	Test index.html for CSS functionality and acceptance criteria	DONE	Add comment	AP Sprint 4

Fix sticky footer
 + Add @ Apps
 Done Done Improve Bug
Description
 The sticky footer feature is not functioning correctly when the page contains minimal content, leading to a poor user experience as the footer fails to stay fixed at the bottom. Ideally, the footer should remain sticky at the bottom of the viewport regardless of how much content is on the page. Currently, it does not do this when the amount of content does not fill the page.
 To reproduce the issue, one can open the page with limited content and inspect the footer, body and main sections using F12 developer tools. Collaboration with ChatGPT is suggested for troubleshooting the problem if review of Christine Truong's LinkedIn Learning video and MDN Web Docs proves insufficient.
 Details Assignee, Labels, Parent, Due date, Team, Start...
 Automation Rule executions
 GitHub links Open GitHub links
 Created 2 minutes ago Updated 11 seconds ago Configure



Bug: An issue that needs fixing

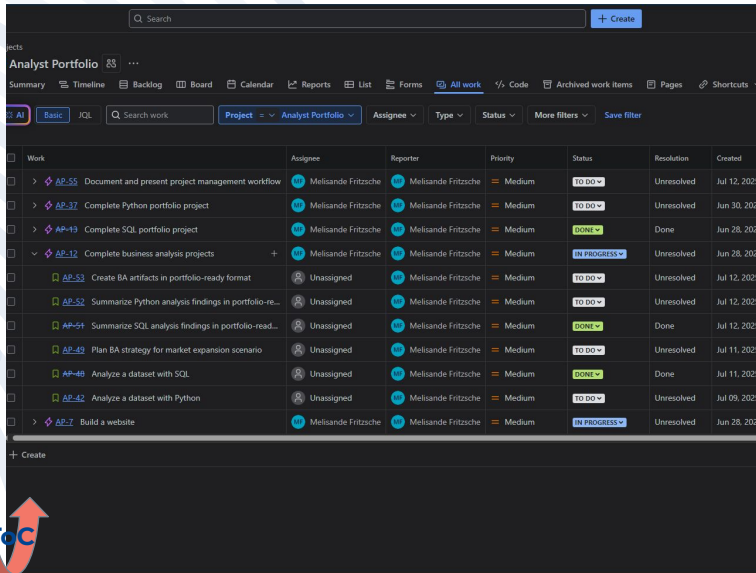
Ah, bugs! When you finally finish a task and think you've checked everything, but then something comes out of left field. I had not used this feature much when I started my project because I saw it as applying to literal product development more. However, as I progress into the maintenance phase of building my website I see it as more useful because I need to not put off a task in the active sprint to fix a but. Everything needs to wait for its turn!

Project Management

Jira Desktop



All Work

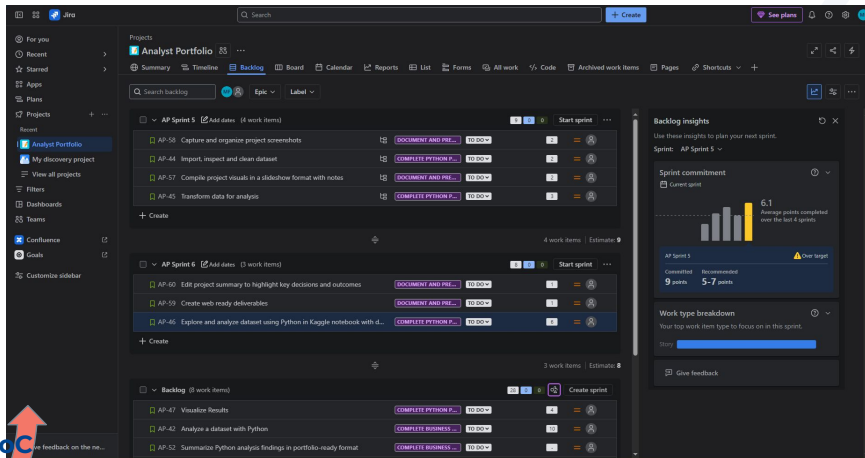


Work	Assignee	Reporter	Priority	Status	Resolution	Created
> AP-55 Document and present project management workflow	Melkaende Fritzsche	Melkaende Fritzsche	Medium	TO DO	Unresolved	Jul 12, 2025, 9
> AP-37 Complete Python portfolio project	Melkaende Fritzsche	Melkaende Fritzsche	Medium	TO DO	Unresolved	Jun 30, 2025, 9
> AP-19 Complete SQL portfolio project	Melkaende Fritzsche	Melkaende Fritzsche	Medium	DONE	Done	Jun 28, 2025, 9
AP-12 Complete business analysis projects	Melkaende Fritzsche	Melkaende Fritzsche	Medium	IN PROGRESS	Unresolved	Jun 28, 2025, 9
AP-53 Create BA artifacts in portfolio-ready format	Unassigned	Melkaende Fritzsche	Medium	TO DO	Unresolved	Jul 12, 2025, 9
AP-52 Summarize Python analysis findings in portfolio-ready format	Unassigned	Melkaende Fritzsche	Medium	TO DO	Unresolved	Jul 12, 2025, 9
AP-51 Summarize SQL analysis findings in portfolio-ready format	Unassigned	Melkaende Fritzsche	Medium	DONE	Done	Jul 12, 2025, 9
AP-49 Plan BA strategy for market expansion scenario	Unassigned	Melkaende Fritzsche	Medium	TO DO	Unresolved	Jul 11, 2025, 8
AP-48 Analyze a dataset with SQL	Unassigned	Melkaende Fritzsche	Medium	DONE	Done	Jul 11, 2025, 8
AP-47 Analyze a dataset with Python	Unassigned	Melkaende Fritzsche	Medium	TO DO	Unresolved	Jul 09, 2025, 9
AP-7 Build a website	Melkaende Fritzsche	Melkaende Fritzsche	Medium	IN PROGRESS	Unresolved	Jun 28, 2025, 9

Where I go to see everything I've done and everything I've yet to do.

This is where I usually start when I don't have an active sprint. I like to get a big picture view of the project before diving in to work to keep things in perspective.

Backlog Filling

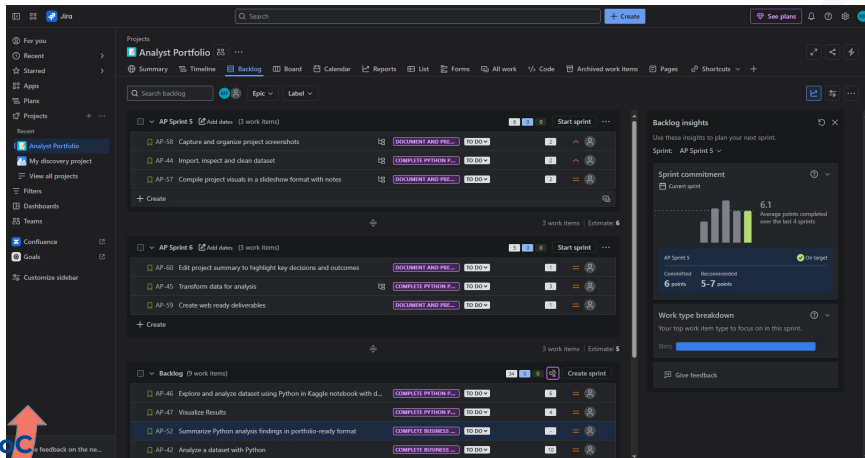


- Keeping track of all my project's stories
- Using the built-in tools to ensure I avoid burnout and missed deadlines

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When I learn a new tool, I usually operate with a “click buttons and see what happens” mentality. Atlassian is nice enough to have tool tips to give me a hint of what any button might do prior to clicking. I appreciate the insights offered...

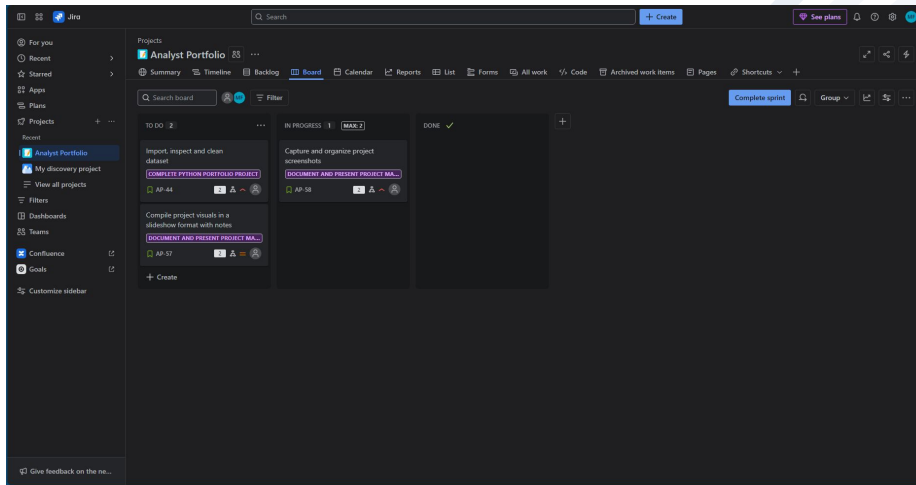
Backlog Refinement



- Adjusting the backlog to optimize delivery
- Prioritizing tasks based on value and effort

...and actually use them. That's why they're there. My use case definitely benefits from strict adherence to the backlog insights because I am the only worker. I wish that the priority field was easier to edit or that it defaulted to null. I don't think it's worth it to go through and adjust them all for my use case, but it makes me uncomfortable having them all be there and all be "medium".

The Board



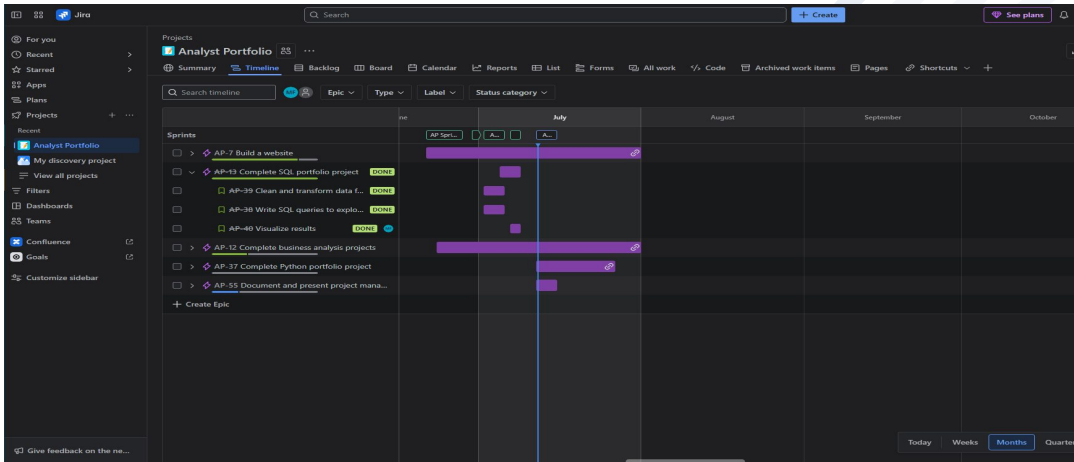
I love moving work from one bucket to another!

I made sure to put a limit on work in progress to mitigate my overconfidence.

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I was disappointed that the free version of Jira does not support Kanban. Working based on work in progress (WIP) load and emphasizing flow of work items fits my work management mentality better, and for my use case it would have been a better set-up. It's unfortunate that whiteboards use so much bandwidth, but I think I'll try to prioritize my backlog after my next sprint using the whiteboard integration with Confluence.

Timeline - Month View



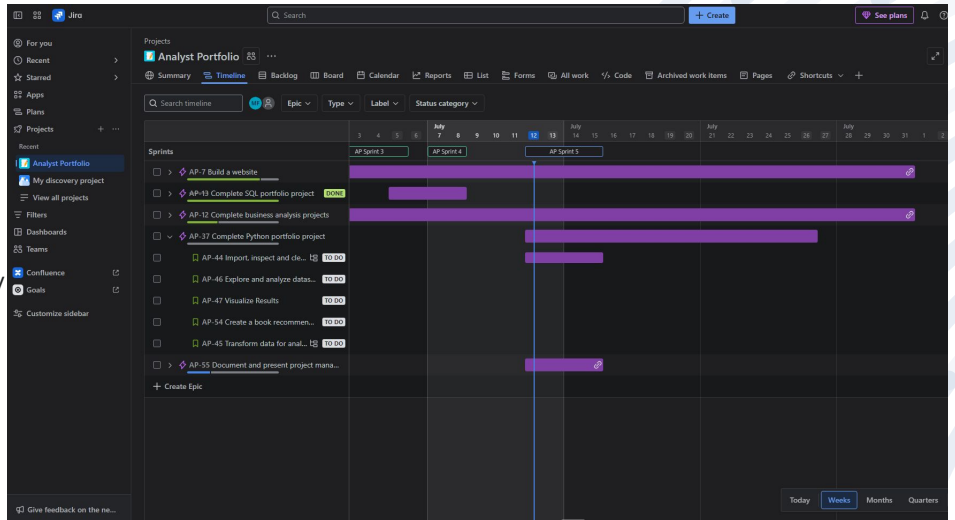
Getting a Gantt-esque view of the project as a whole

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I do have links between work items, but they don't have high visibility on the timeline. I am trying to deliver value in a short amount of time. One of my project assumptions is that I have the intelligence and energy to do this. 😊

Timeline - Week View

Using the timeline to get a more granular view of the work to be done.



When I want to see the trees for the forest I come to the timeline view. I need to see all the pieces of work that add value to the story. Work breakdown structure for the win!

Project Documentation

Confluence Desktop



Retrospective

Analyst Portfolio / Retrospective: AP Sprint 1 (Write HTML Structure)

Owned by Melissaonde Fritzschke, created with a template ...
Last updated: just a moment ago • 1 person viewed

Overview

Reflect on past work and identify opportunities for improvement by following the instructions for the [Retrospective Play](#).

Date	Jun 30, 2025
Team	Army of One
Participants	@Melissaonde Fritzschke

Retrospective

Start doing	Stop doing	Keep doing
<ul style="list-style-type: none">Scheduling work in time boxes	<ul style="list-style-type: none">"Side quests"	<ul style="list-style-type: none">Consult with AI before taking action.
<ul style="list-style-type: none">Practice new concepts on one html file at a time.		<ul style="list-style-type: none">Using all resources available
<ul style="list-style-type: none">Write and test in VS before committing to GitHub.		

Action items

- ☐ Make mock-ups of web pages.
- ☐ Reevaluate scope for every idea. Learn to say, "no."

Summarize changes

Summarize changes

retrospective X + Add label

- First sprint retrospective
- Holding myself accountable for correcting poor behaviors

Hooray for lessons learned and retrospectives! Being a one-person team, there's less bonding and collaboration involved, but I do these to hold myself accountable. I have ego and I need to acknowledge when I overestimate my abilities or make decisions with unintended or detrimental consequences.

Being able to acknowledge what I am doing well, what I'm not doing well and what I have discovered that could help me succeed is a great help. Also, writing things down increases neural pathways and memories so now I will never *not* use F12 dev tools to troubleshoot a webpage ever again.

Retrospective

The screenshot shows a Jira retrospective board titled "Retrospective: AP Sprint 3 (SQL coding)". It includes an overview section with a date of Jul 5, 2025, a team of "Army of One", and a participant "@Melissandra Fritzschke". The retrospective section contains a table with three columns: "Start doing", "Stop doing", and "Keep doing". The "Start doing" column lists "Write a DoD to know when enough is enough" and "Make a schedule or procedure, e.g., a >b>c, repeat". The "Stop doing" column lists "Working randomly". The "Keep doing" column lists "Asking AI for debugging assistance", "Using programming language documentation", and "Following your instincts". The action items section lists "Make definition of done", "Post to GitHub", and "Write/update .md files".

Start doing	Stop doing	Keep doing
<ul style="list-style-type: none">• Write a DoD to know when enough is enough• Make a schedule or procedure, e.g., a >b>c, repeat	<ul style="list-style-type: none">• Working randomly	<ul style="list-style-type: none">• Asking AI for debugging assistance.• Using programming language documentation• Following your instincts.

- Third sprint retrospective
- List and complete action items to improve future sprints

Hopefully we see positive shifts in my leveraging of the the retrospective...

Retrospective

- Fourth sprint retrospective
- Having different work types in the project means different lessons learned
- Refining the learning process

Retrospective: AP Sprint 4 (Website Build-out)

Owned by Melissa Fazzache • Last updated: just a moment ago • 1 min read • 1 person viewed

Overview

Reflect on past work and identify opportunities for improvement by following the instructions for the [Retrospective Play](#).

Date	Jul 11, 2025
Team	Army of One
Participants	@Melissa Fazzache

Retrospective

1 Add your Start doing, Stop doing, and Keep doing items to the table below. We'll use these to talk about how we can improve our process going forward.

Start doing	Stop doing	Keep doing
<ul style="list-style-type: none">• Write a DoD to know when enough is enough• Make a physical task list to mark it when things are done	<ul style="list-style-type: none">• Not tracking timeboxing• Pretending that what you'd like, no matter how small, isn't scope creep	<ul style="list-style-type: none">• Asking AI for debugging assistance.• Using programming language documentation
<ul style="list-style-type: none">• Timeboxing properly- research how		<ul style="list-style-type: none">• Use F12 dev tools!• Syncing VS Code to GitHub repo

Action items

- ☐ Make definition of done - 10 min per deliverable - put in as acceptance criteria
- ☐ Post to GitHub

+ Add label

Summarize changes

Summarize changes

I had another collaboration session with ChatGPT to verify whether I was completing these retrospectives properly. I also asked when the action items were supposed to be marked completed.

ChatGPT suggested that I get more specific about the action items, giving timeframes and details, which I added here. They also made suggestions via questions about how to fill out the table. Prior to our conversation, my "Stop doing" had been blank even though I knew that I had done things that had hindered progress on the sprint tasks. The questions it asked helped me articulate the things that I had done that I should try and stop.

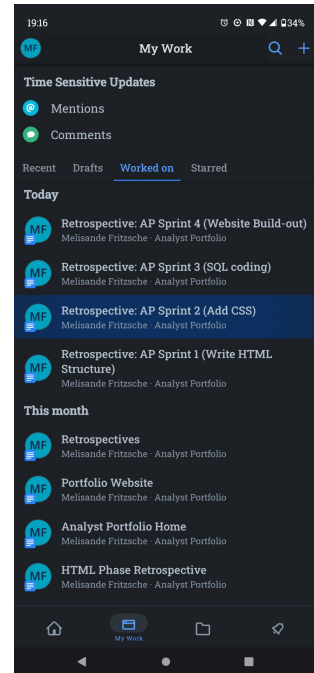
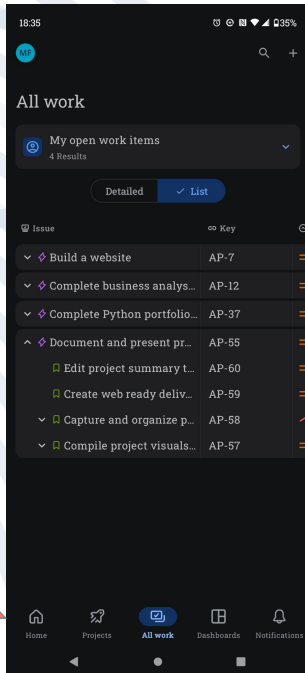
Project Portability

Mobile Apps



Mobile Updates

- Downloaded the Jira and Confluence apps to my phone so I can add ideas to the backlog as they occur to me or edit a document anytime
- Log and track the time I spend working on tasks
- Start a retrospective as soon as I finish a sprint



My brain doesn't switch off except for maybe five minutes while I'm sleeping. Having Jira on my phone lets me input updates like logging time and changing the work status of a task when I'm not at my computer. Similar to the Jira app, it is helpful to be able to work on project documents in Confluence on my phone while sitting anywhere. Luckily, I have a bluetooth keyboard, which makes typing at scale easier.

