## Your Guide to Connecting Projects, People, Content, and Partners

Sponsors | Portfolios & Projects | Staffing & Expertise | Managing Documents | Search, Discover, & Analytics | Collaborating with MITRE & External Partners | Assessment



## A Knowledge–Driven Enterprise (KDE) Results in Higher Quality Outcomes

Welcome to an overview of MITRE's tools and processes for supporting portfolio, project, and document management. You may be new and just discovering what the company offers you. Or perhaps you're an experienced staffer looking to better understand new MITRE processes and the tool suite that supports them. In either case, you have come to the right place.

This guide describes and points to the resources that will help you thrive in your assignments. It outlines the tools and systems in place for planning and executing portfolio and project plans, customer engagement, project staffing, and knowledge sharing, all in support of the way that MITRE does business. Following standard processes and using consistent practices across the tool suite strengthens the company's ability to deliver work. As we enable reliable knowledge capture and reuse, we gain insight into our operations and how we as a company use our resources. This insight helps us develop additional services on everyone's behalf so that we can do our jobs more efficiently.

As your workflow processes mature and your sponsors' needs evolve, you'll be able to immerse yourself more fully in MITRE best practices with the links we'll point you to inside this guide. FastJump: <u>MITRE Tools</u> or <u>mtools</u> for an online version of this booklet and for a straight shot to the Tools & Templates page. FJ: <u>mitreway</u> for an overview of the MITRE Way processes. To see how MITRE discusses knowledge management with the rest of the world and how you can participate in that conversation, FJ: <u>kdesite</u>.

Go do great things!

## Understanding Your Sponsors

Tools for managing strategy and value



Because our sponsors' business needs drive everything we do at MITRE, a good place for a portfolio or program leader to start is the **Customer Environmental Scan** 

(FJ: <u>environmental scan</u>). This process helps you focus on your customers' current

environment and identifies the factors likely

#### The Customer Environmental Scan

- 1. The Customer Blueprint outlines the information you need to collect.
- 2. CI&T Information Services helps you find that information via our many subscription databases for federal and government agencies. See the *mitre way research guide*.
- You can perform this research yourself or use a research analyst from Information Services to help you.

to influence its evolution. The scan helps the portfolio team write its **Customer Blueprint**. Ask your porfolio team where to find a copy of the blueprint for your program if you've never read it. If you're a portfolio leader, MITRE's **Customer Relationship Management (CRM)** system (FJ: <u>mitrecrm</u>) will help you capture and maintain appropriate sponsor data. CRM helps you track what your

## Thinking strategically about your customer's needs

- Ask your colleagues and managers for background on the technical and business issues that keep your sponsors up at night.
- To learn more about your sponsor's environment, ask Information Services (FJ: <u>infoservices</u>) to help you with an environmental scan and baseline assessment.
- Share information that your teams need to know on MITRE's many forums: Handshake, Lists, MITREpedia, and others.
- Use the **CRM** system to record information such as MITRE points of contact, sponsor organization charts, professional biographies, and meeting minutes.
- Ensure that the sponsor information stays current by creating regular update schedules with your teams.
- Work with your teams to capture Strengthening the Core (STC) project assessments using the STC Guide and the survey tool found at FastJump <u>STC</u>.
- Need help? FastJump: <u>MITRE Tools</u> or <u>mtools</u> for the tools menu and links to training videos and webinars.

sponsors value, how they rate MITRE's value, your team's engagement strategy, and MITRE's impact. The CRM system automates report generation so that you can keep your attention where it belongs and not have to fiddle with routine documentation.

The **Customer Blueprint** and **Customer Value Profile** (FJ: <u>mitreway</u>), and **Program Work Value Analysis** (FJ: <u>clarity</u>) contribute to your team's **Five Year Customer Strategy**. The strategy explains your portfolio's strategic direction and outcomes for our FFRDC role, and how projects will contribute to customer outcomes. FJ: <u>MITRE Tools</u> or <u>mtools</u> to access the full suite of sponsor-related tools.

## Planning & Managing Portfolios & Projects

Tools for describing your work, tracking outcomes, and integrating resources



All of MITRE's sponsors have strategic outcomes of their own. One reason they come to our company in the first place is that they want our counsel. Wise counsel is strategic, and strategies are best developed with an eye to the future. Our portfolio strategies help us anticipate how the work we are doing will contribute to sponsor outcomes. To enable you and your teams to take the long view, our suite of tools aims to help you focus on the right horizon while keeping your efforts in the flow of your daily work. Portfolio and Project Pages each help you record what you are doing so that you can repurpose your words and data. Need to brief a sponsor? The data is there. Write an activity or quarterly report? The data is in one place where everyone can take advantage of your due diligence.

**The Portfolio Pages** tool captures overview information about your team's sponsor portfolio, the strategic outcomes, and the portfolio work plan. It also aggregates portfolio information from related systems such as the CRM, eReqs, and published documents. For access to the full slate of MITRE's portfolios and sub-portfolios, FJ: *portfolios*.

#### Keeping track of your work

- Fill out the Project Pages tabs— Overview, Staff, Sponsor/QWF, and POET—to document your project's most important outcomes, the technical quality of your products, and to ensure MITRE's accountability for our sponsors' success.
- Write the Overview text in neutral language that you could share with sponsors and colleagues.
- Think of the information on the Overview page as your project's elevator pitch. It's there for you and your colleagues to repurpose.
- When your project receives additional funding, extend the current page to create a new page—linking past and present seamlessly.
- Write your outcome statements so that they meet the criteria MITRE is accountable for (i.e., specific, measurable, achievable, relevant, time-bound, impactful).
- Use the POET page as a secure place to document honest assessments of the project's risk areas and customer involvement.
- Need help? FastJump: <u>MITRE Tools</u> or <u>mtools</u> for the tools menu and links to training videos and webinars.

**Project Pages** capture detailed project outcomes and plans at the project level, as well as the status of those plans and staff deliverables. You know how frustrating it is when you don't know what's happening with a given task. Are staff on target to deliver as promised? What are those deliverables? Where can you find them? Which goals do they support? Project Pages capture all of the details in one place so that everyone can access your data anytime. They don't replace conversations—they enrich them so that you can track goals, technical solutions, and sponsor outcomes in the flow of your reporting cycles (FJ: *project pages*, or *discover projects*).

## Staffing Projects and Finding Expertise

Tools for finding expertise, people, and organizations



Our work extends well beyond collecting and reusing data. MITRE tools help you find people with knowledge of or expertise in a particular skill area; who have experience with a particular tool, process, domain, or customer; or who can answer a question, point you to a resource, or staff a project team.

 People
 MII Search
 Projects
 Proj/Task #
 Orgs
 Communities
 More
 EXPLORE

 Find a person by name, dept., skill, topic, and more
 DISCOVER
 EXPLORE
 HELP

Want to find colleagues who share your interests? Know things that you want to learn? Know customers you need to talk to? Or do you just need a phone number and a mail stop? To answer a large question or small one, you can search for any MITRE staff by name, skills, or experience. Everyone is present and accounted for.

#### **Staying visible**

- Update your **Technical Stature** yearly to reflect your most relevant
   skills.
- Focus on recent skills and experiences. Sustain older information in your resume.
- Put an up-to-date resume in your About Me folder.
- For skill tags, use single words or short phrases (five words or fewer) such as Java, natural language processing, risk management, Lean Six Sigma, event planning, or whatever reflects your skills, and interests.
- Limit your tags to your primary focus areas.
- Need help? Edit your tags by clicking on the pencil on your Technical Stature page.

The **Discover People** search tool will execute your search, display your results, give you additional filter opportunities, and take you to the People Pages. These pages display contact information and pointers to your colleagues' documents and communities. They also link to a **Technical Stature** tab where you can find detailed information about skills and experience—and where you can post your own. Skills tags help ensure that your colleagues can find your expertise when they need it. Together, these tools help you reduce the time you spend on the administrative aspects of your workflow.

#### **Project Staffing**

If you're a project leader, you can identify the talent you need by posting task requisitions in the **Enterprise Requisition** (FJ: <u>e-Req</u>) system.

Discover People also guides you to the right MITRE staff for your customer's needs. After searching for a skill or expertise term, you can further filter the result set by organization, location, level, degree, foreign languages spoken, etc. This lets you home in on exactly the kind of skill resource that you need to make your project a success.

You can search for staff by name, skills, skills attributes, or experience. Start by entering keywords for a skill or expertise area, or by browsing and filtering by the skill attributes (e.g., organization, job specialty, level, location, degree, and military experience).

4

## Managing Documents

Tools for managing products and finding them later



As a good steward of the government's resources, MITRE is responsible for the knowledge we create and collect on the government's behalf. Our product libraries enable you to reuse data that your peers have collected for their sponsors and to immerse yourself in one of our greatest assets: reachback. You can use Community Share project team sites to collaborate as you and your teams create and capture deliverables that will make their way through our knowledge flow. You post final versions to the new MITRE Product Libraries (FJ: *mpl*), and we help you find these finished products via our **Discover Center Products** capability (FJ: center products). You can search for documents by keyword or filter them by document metadata items such as author, portfolio, document ID number, project number, and fiscal year. This capability is central

### Managing your documents and those of your team

- Use Community Share working sites during the active phase of your project for team coordination, supporting materials, and drafts.
- Upon finishing a formal or informal deliverable, publish it to your Center's Product Library.
- Exercise good stewardship by entering descriptive metadata to ensure that your colleagues can find your products—and you!—easily when they need them.
- Use Discover Center Products and Discover Archived Products to find products others have published that may interest you and be relevant to your activities.
- Need help? FastJump: <u>MITRE Tools</u> or <u>mtools</u> for the tools menu and links to training videos and webinars.

to successful reachback or to finding projects working with similar technologies.

#### **MITRE Product Libraries and Document Management**

MITRE manages its products in accordance with our Corporate Records management policies (FJ: <u>records</u>). Searchable and browsable by Discover, MITRE Product Libraries are managed by our Corporate Records management system. The **Center for National Security**, **Center for Connected Government**, and **Homeland Security Center** product libraries are ready as of 2015. More than 80,000 archived documents

can also be searched using **Discover Archived Products**. Our libraries are a rich source of information—and you can make them even richer by uploading your finished documents! Project and Administrative email is also managed in accordance with our Corporate Records management policies (FJ: *email guidance*). Tagging emails as Project and Administrative records ensures that they are kept for the proper retention periods.

#### **Publicly Released Documents**

From the **Public Release** (FJ: <u>prr search</u>) option in Discover's **More Menu**, you will find a comprehensive browse and keyword search of the electronic versions of all MITRE's publicly released documents from 2002 on. MITRE copyright is displayed on most documents. Direct copyright and intellectual property questions to the **Technology Transfer Office** (FJ: <u>tto</u>).



## Search, Discover, and Analytics

Tools for finding documents and data on the MII



You've already heard about **Discover People**, **Discover Center Products**, **Discover Archived Products**, and **Discover Public Release**. But there's more to our faceted search than staff and stuff. Read on...

We share what we know via many vehicles at MITRE. **Discover Communities** helps us track and sort our Handshake, Community Share, and listserv groups by title, fiscal year, number of members, status, owner, and more. A fast way to see which communities you might want to join.

#### Finding what you need

- Poke around on the Discover bar on the MII home page. It helps you search, browse, and reuse all of our key knowledge assets.
- Find a facet that you have never explored before and probe for something you need.
- Take full advantage of Discover Digital Libraries to enhance your knowledge and skills. You'll be surprised at the number of highquality external resources available to you at a click.
- Need help? FastJump: <u>MITRE Tools</u> or <u>mtools</u> for the tools menu and links to training videos and webinars.

MITRE licenses electronic resources on your

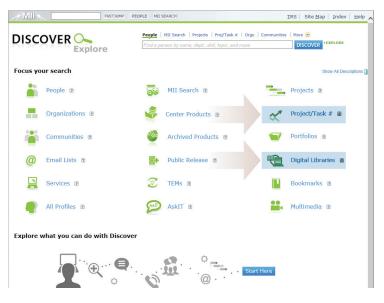
behalf so that you can find everything you might need in a couple of clicks (e.g., IEEE proceedings). Search. Complete an assignment. Learn. Read for pleasure. **Discover Digital Libraries** (FJ: <u>ddl search</u>) sends you to ebooks, conference proceedings,



government documents, newsletters, references, and trade publications to enjoy and to deploy for your work.

#### MII Search is our

comprehensive, full text search tool (similiar to Google or Bing on the Web). It searches across the broadest set of information sources and even finds access-controlled resources in Community Share!



**Discover Orgs** 

(FJ: <u>organizations</u>) helps you find internal organizations by entering a

department or division name, number, or leader's name. By FY16, you will be able to locate organizations with skills and expertise in a particular domain by searching on attributes such as org type, keyword skills, competencies, and capabilities.

**Discover Projects** (FJ: *projects*) is the mechanism by which you can search across Project Pages to find specific projects by keyword or domain area, or to find areas in which MITRE is engaged. The benefit to this particular faceted search is that you can sort by charge number, alpha order, budgeted dollars, organization, contract, and more.

**Discover Portfolios** (FJ: *portfolios*) is the mechanism by which you can browse or search across portfolios to find sponsor strategic plans and outcomes for each sponsor area, and their aligned projects. It gives you an overview of areas in which MITRE is engaged. The benefit to this particular faceted search is that you can sort by portfolio, portfolio type, portfolio leader, portfolio level, and tags.

MITRE is deploying and integrating a **Reporting, Analytics, and Visualizations** (FJ: <u>rav</u>) capability into our knowledge tool suites. Powered by an enterprise version of Tableau, it provides detailed reports on MITRE Way/MITRE tools and process usage, operational management views for tracking outcomes and products, and other useful reports. The first enterprise integrated reports are available from the new Organization Pages. Use the Reports button in the upper right of the Organization Page to access the organizational reports (Over/Under in Clarity; and a Tags Dashboard). These reports offer insight into where we are in our operational processes.

# Collaborating with MITRE and External Partners

Tools for collaborating securely inside and outside the company

MITRE fully embraces the concept of cross-company and cross-community collaboration. MITRE-only teams are rare. As you work across the company, you'll find teams that include sponsors, academic partners, staff from other FFRDCs, and industry. Sharing widely requires precautions, of course, so our tools enable you to collaborate within MITRE and with sponsors and external partners securely.

**Secure File Transfer** (FJ: <u>sft</u>) makes it easy for you to exchange large files with MITRE staff and customers.

#### **Community Share Partners**

(FJ: <u>extranet</u>) is one of the company's collaboration platforms that we use to engage with our partners. Although Community Share (either internal or external) can serve as a simple document repository, used creatively, it can track workflow, function as a community calendar, and serve as a safe haven for all the stuff that makes organizations work but is otherwise hard to keep track of.

## Sharing with your teams and partners

- Are your rich, gorgeous files too big to send via email? Use Secure File Transfer to eliminate those "cannot be delivered" messages.
- Instead of relying on email, consider taking advantage of Community Share Partners. Once you've set up the account, you can invite your sponsors and partners right into the site. You can post and so can they. And no one will keep asking you to resend the same files!
- Do you and your sponsors prefer to see related posts on a page rather than opening and scrolling through an email chain? Use Handshake to satisfy that preference—and get email notifications, too, if you like.
- Share news, documents, and project-specific data with your sponsors via MPN. This is an excellent way to both showcase the value of FFRDCs and avoid local silos (FJ: <u>mpn</u>).
- Need help? FastJump: <u>MITRE Tools</u> or <u>mtools</u> for the tools menu and links to training videos and webinars.

A social networking tool, **Handshake** (FJ: <u>handshake</u>) helps you collaborate with partners and sponsors inside and outside MITRE. To avoid a deluge of emails, your project team or your sponsors may want to encourage everyone on the team to coordinate discussions, messaging, and documentation. Handshake safely enables that kind of freedom to pool resources. Besides team collaboration, Handshake hosts communities based on shared interests. One caveat: It's not for sensitive content.

If you want to collaborate via video teleconference facilities and desktop conferencing tools, **UC Conferencing** (FJ: <u>lync meeting</u> or <u>uc conferencing</u>) gives you,



your partners, and your sponsors the means to do that.

**MITRE Partnership Network** (FJ: <u>mpn</u>) is a collection of tools that support external collaboration. The MPN portal is an entrance point for our partners to this environment, with pointers to resources such as Community Share Partners, Secure File Transfer, and Handshake. For descriptions of other MPN content-sharing capabilities such as WordPress, CoDev, and semantic Wikis, visit the MPN info site (FJ: <u>mpn info</u>).

Email may still be the best option for some communication and collaboration–using PKI certificates to share sensitive information securely is one of them (FJ: <u>email guidance</u>).



## MITRE's knowledge-driven enterprise in the flow great resource management that we enable together!

Please send comments and feedback to Donna Cuomo (<u>dcuomo@mitre.org</u>) and Jean Colbert (<u>jcolbert@mitre.org</u>).

© 2015 The MITRE Corporation. All rights reserved.

Version 2.1 Approved for Public Release. Distribution unlimited. Case number 15-2134.

Produced by MITRE Corporate Communications and Public Affairs.



