

JIRA Overview & Configuration

Based on the A2F Framework

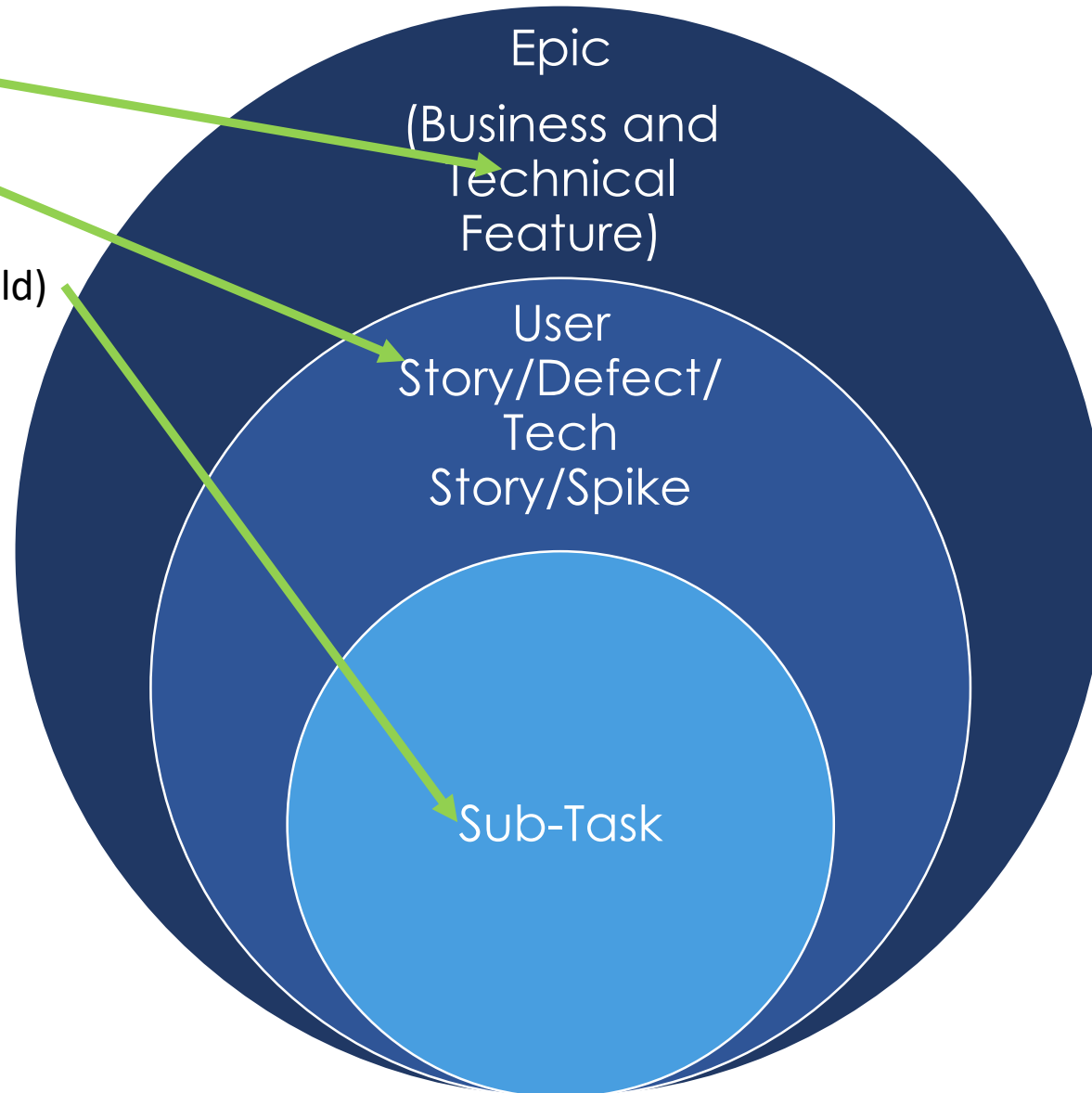
- What is Jira?
 - Proprietary issue tracking software tool
 - Developed by Atlassian located in Sydney, Australia
 - It provides
 - Defect tracking
 - Issue tracking
 - Task management
 - Project management functions
 - Supports Agile
 - Is scalable, very configurable, easy to use, and can significantly enhances communication

- What makes up a Jira Project?
 - A Project is a collection of Issues in JIRA
 - It allows Teams to coordinate and deliver a desired outcome
 - Ex. – A software product or a marketing project
 - Each Project has a unique Project Key
 - External Website (Project Key = EXWEB)
 - Human Resources (Project Key = HR)
 - Automotive (Project Key = AUTO)
 - This unique key is used to identify all issues in that project
 - Ex. – HR-46
 - *Recommendation: To have all current Scrum Teams (3 Teams) under one Project. This will reduce JIRA Admin overhead by 66%, and will be easier to generate metrics without having to install JIRA Portfolio.*

- Issues are the JIRA term for a record of information such as a requirement, defect, or spike
 - Story
 - Defect
 - Improvement
 - Request
 - Epic
 - Task
 - Almost anything we want!
- These are the basic elements of JIRA and they follow a predefined hierarchy
- Each Issue has specific fields that hold its details and attributes
 - Some that are built-in
 - Capable of creating custom fields
- *Recommended Issue Types: Epic, Story, Tech Story, Defect, Spike, Sub Task*

JIRA Standard Issue Type Hierarchy

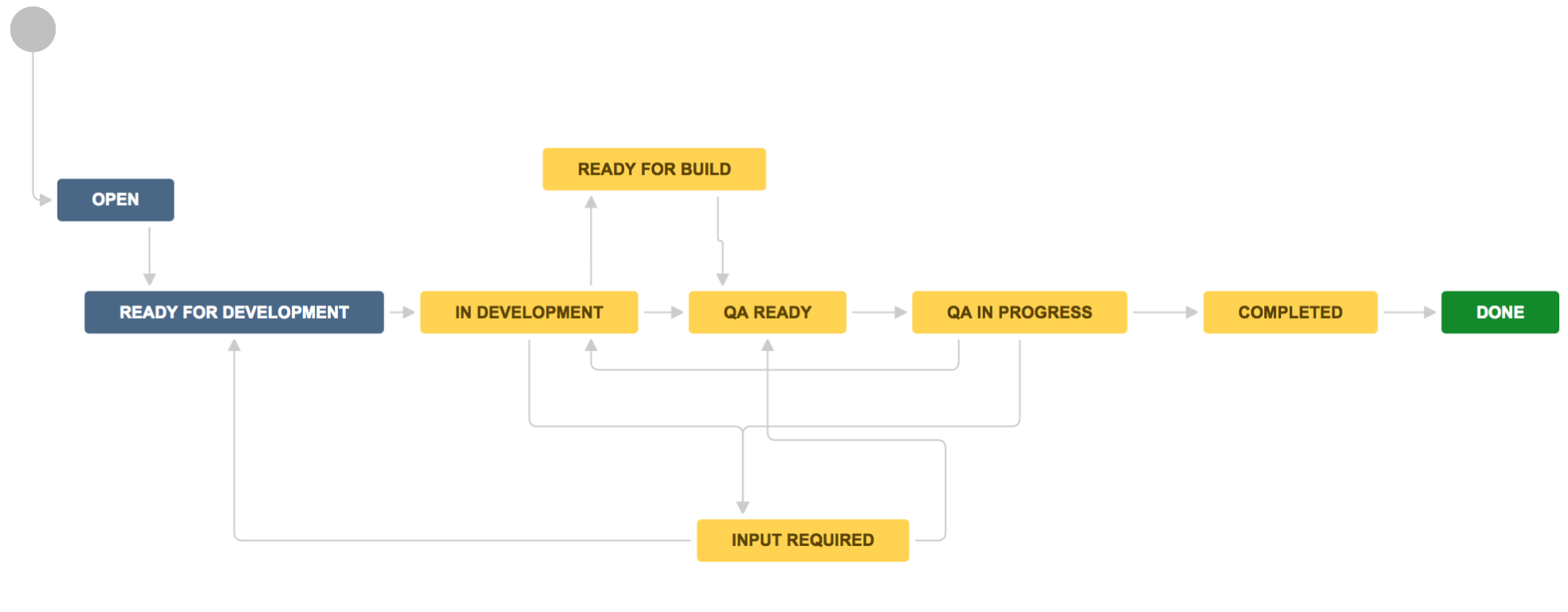
- Highest Level (i.e., Parent)
- Medium Level (i.e., Child)
- Lowest Level (i.e., Grandchild)



JIRA Agile Issue Types

Hierarchy	Issue Type	Description
Top	Epic/Feature	A tangible business or technical functionality that needs to be broken down into one to many Stories
Middle	User Story/Tech Story/Spike	A work item (issue type) that can be completed within a Sprint. Represents business or technical value (User/Tech), or research/analysis that needs to be done (Spike).
Middle	Defect	An unplanned Issue related to improperly working software or systems for previously working functionality.
Bottom	Sub-Task	A unit of work within a work item that is often executed by a single team member. Typical Sub-Task ranges from 2 to 16 hours.

- JIRA uses a workflow to manage Issue delivery through its lifecycle
 - Issues must follow the assigned workflow states



- JIRA uses the concept of issue ownership

Owner	Responsibility
Assignee	Owner of the work in an Issue
Reporter	Creator of an Issue

- Issues can only have one Assignee and one Reporter



Project Roles and Permissions

- Project roles are a flexible way to associate users and groups with permissions in a particular project

Project Role	Definition
Administrator	Resources who administer the Project (i.e. NBC-OTS)
Scrum Master/PO/Tech Lead/Team Member	Resources who create, edit, manage, and deliver Issues
External Stakeholders	Resources with View-only permissions

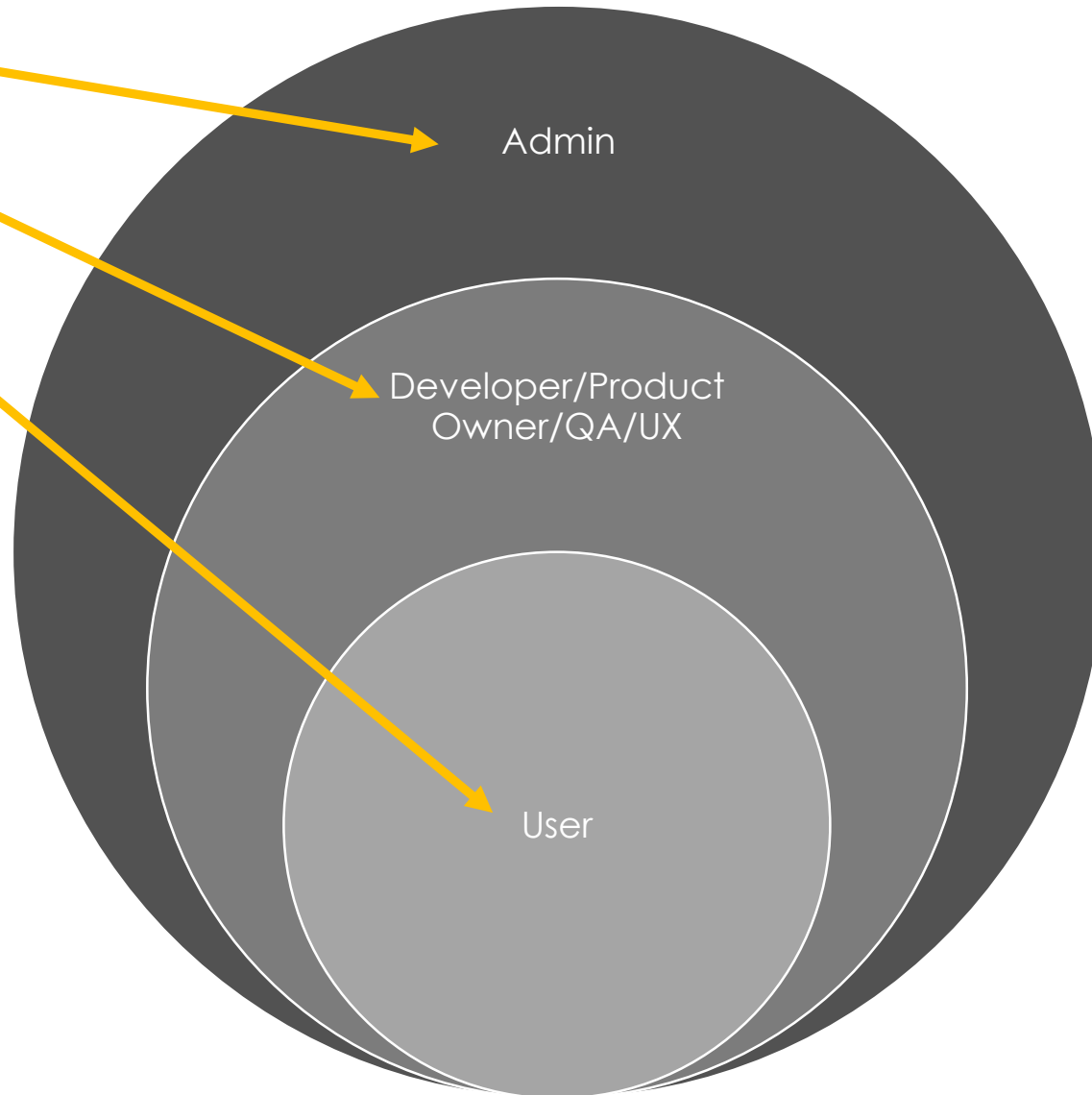
- Other roles may be added later in your instance to support organization needs

Hierarchy of Roles

- Higher Privileges

- Medium Privileges

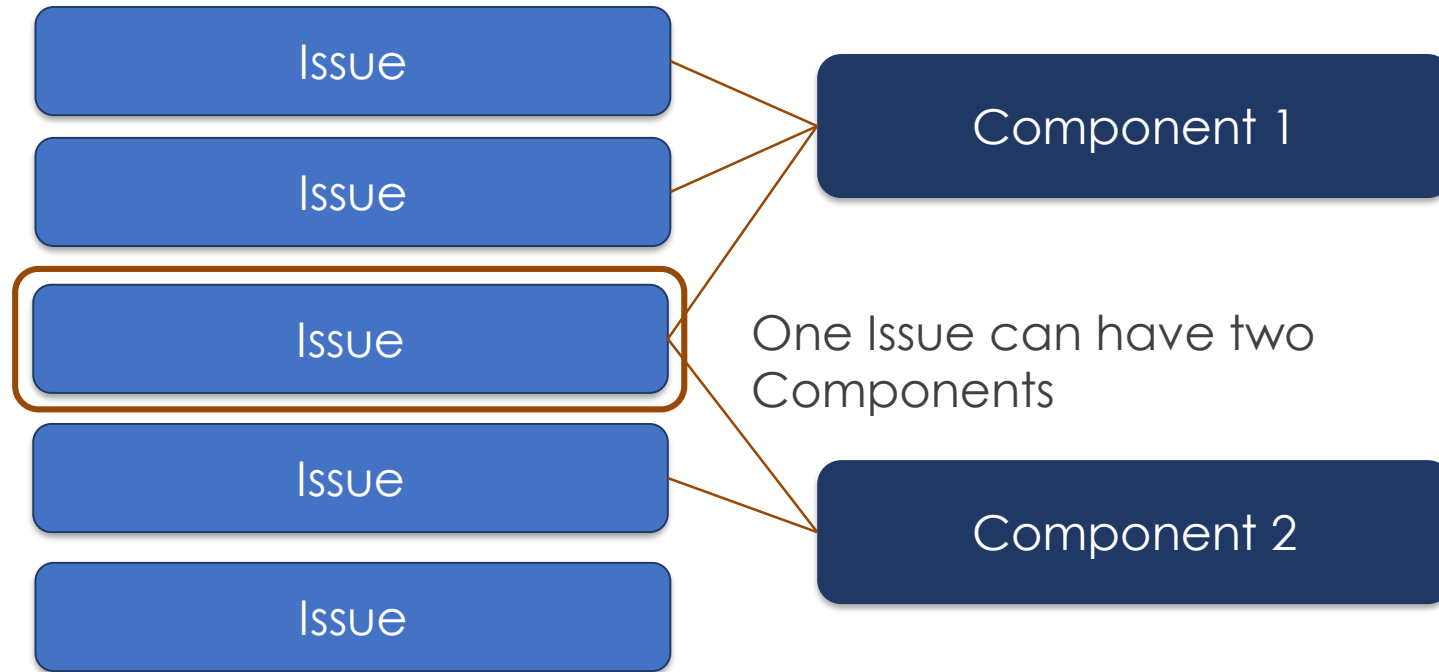
- Lowest Privileges



Components

- Components are a project-specific categorization to help group and find Issues
- We will use a pre-set drop down for the Components field

Components

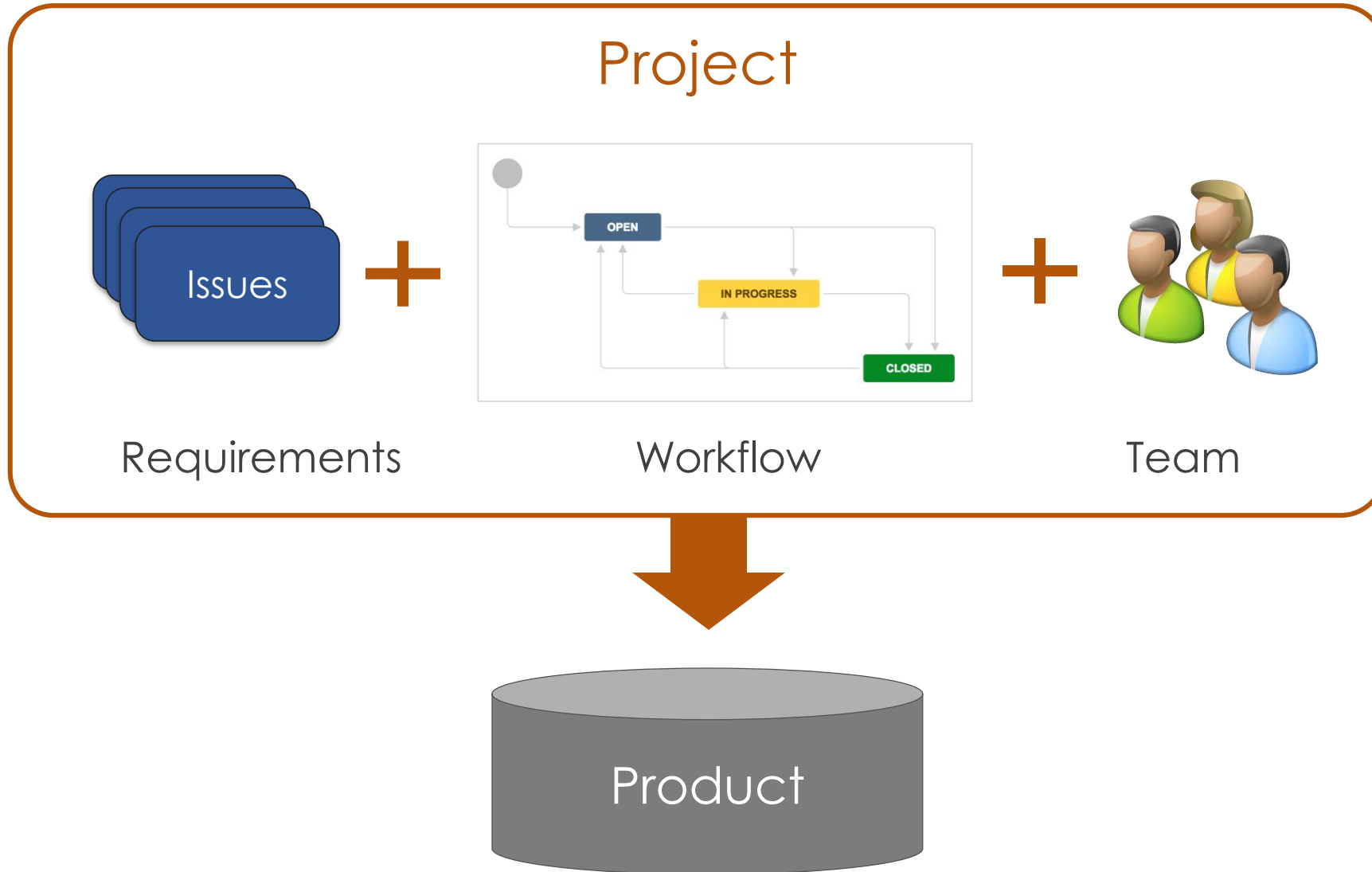


- “Tag” an issue with a Component
- Issues may belong to one, many, or no components
- Can search on Components to find common work

- Releases are project-specific groupings to assign work to a date and deliver a specific business or technical goal
- Configure the Version name, description, and dates
 - Uses the “FixVersion” field

Releases					
Q QUICK FILTERS: Released Unreleased					
Version	Status	Progress	Start date	Release date	Description
3.0	UNRELEASED			26/Sep/16	Version 3
2.2	UNRELEASED			29/Aug/16	Version 2.2
2.1	UNRELEASED			21/Oct/15	Version 2.1
2.0	UNRELEASED			12/Aug/15	Version 2.0

Projects deliver Products



Application Features and Project Types

- Each Project Type delivers tailored configurations for different purposes

Application	Project type	Application specific feature set
JIRA Core	 Business projects	• Available to all licensed users
JIRA Software	 Software projects	• Integration with development tools • Agile boards • Release hub for software versions
JIRA Service Desk	 Service Desk projects	• Service Level Agreements (SLAs) • A customizable web portal for customers • Permission schemes allowing customer access

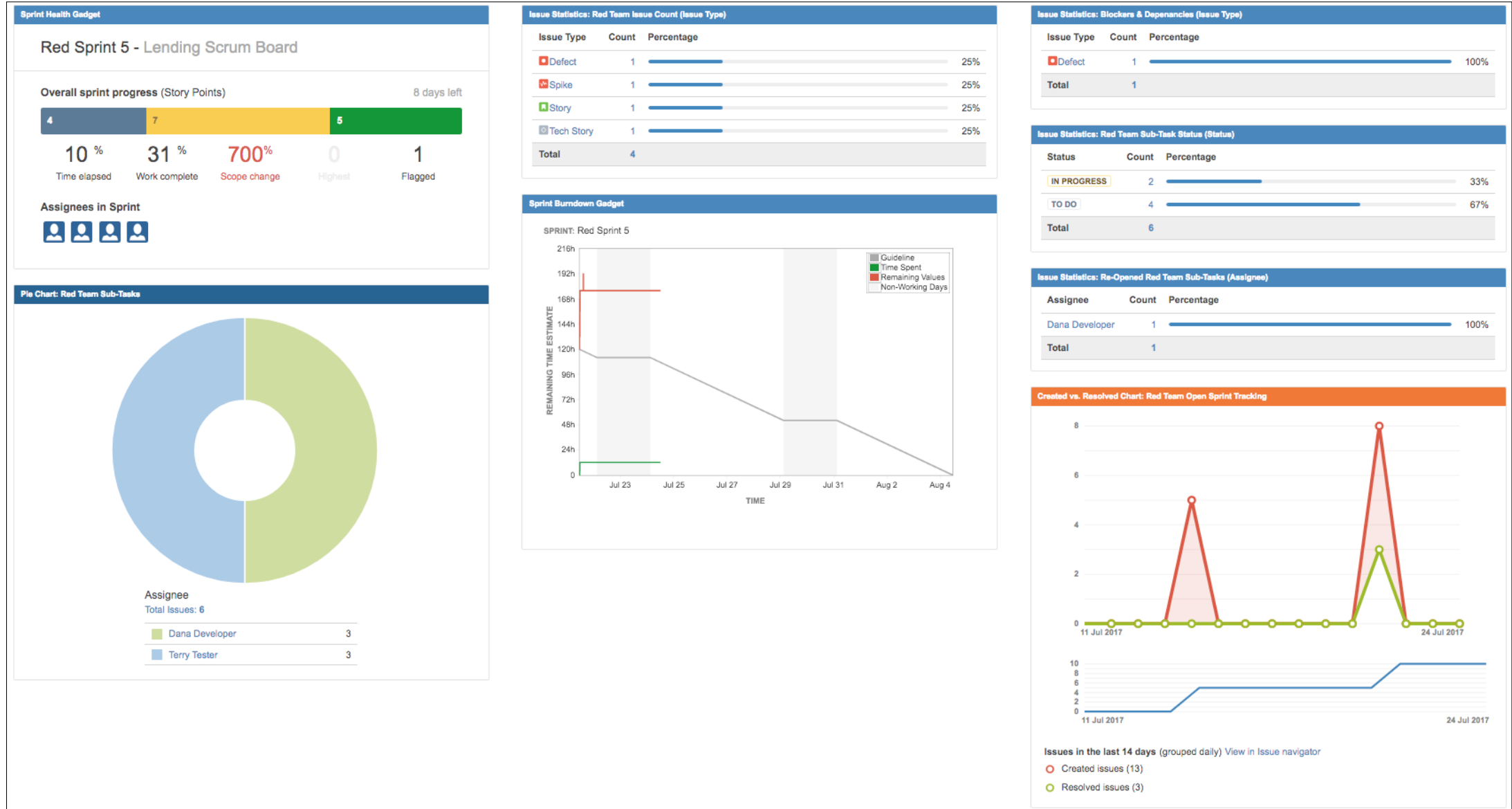
Working on an Issue

- How Does It Works

- Moving an issue to In Progress, you are indicating that work has started on it
- Usually the Issue will be assigned to you, so that everyone knows who is working on it
- You may also want to add some technical details about the Issue
 - It's helpful for your teammates to know as much information as possible about the Issues you're working on
 - In the Active Sprints of your Team's Agile Board, select the issue in the In Progress column
 - The issue is displayed in the Issue Detail view
 - In the Issue Detail view, select Edit from the 'cog' drop-down
 - The 'Edit Issue' dialog will be displayed (you can also perform in line editing)
 - Click the update button when you are finished editing
- Objective is to keep your assigned Issues up to date with useful information
- As a member of a Team you are helping to progress the work to completion and delivery

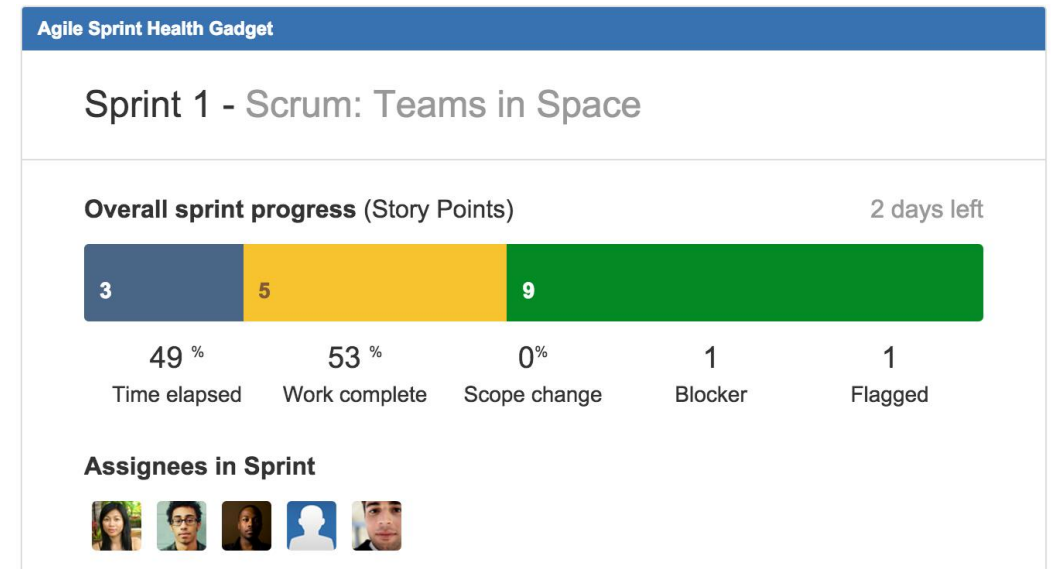
Jira Dashboard

Jira Dashboard



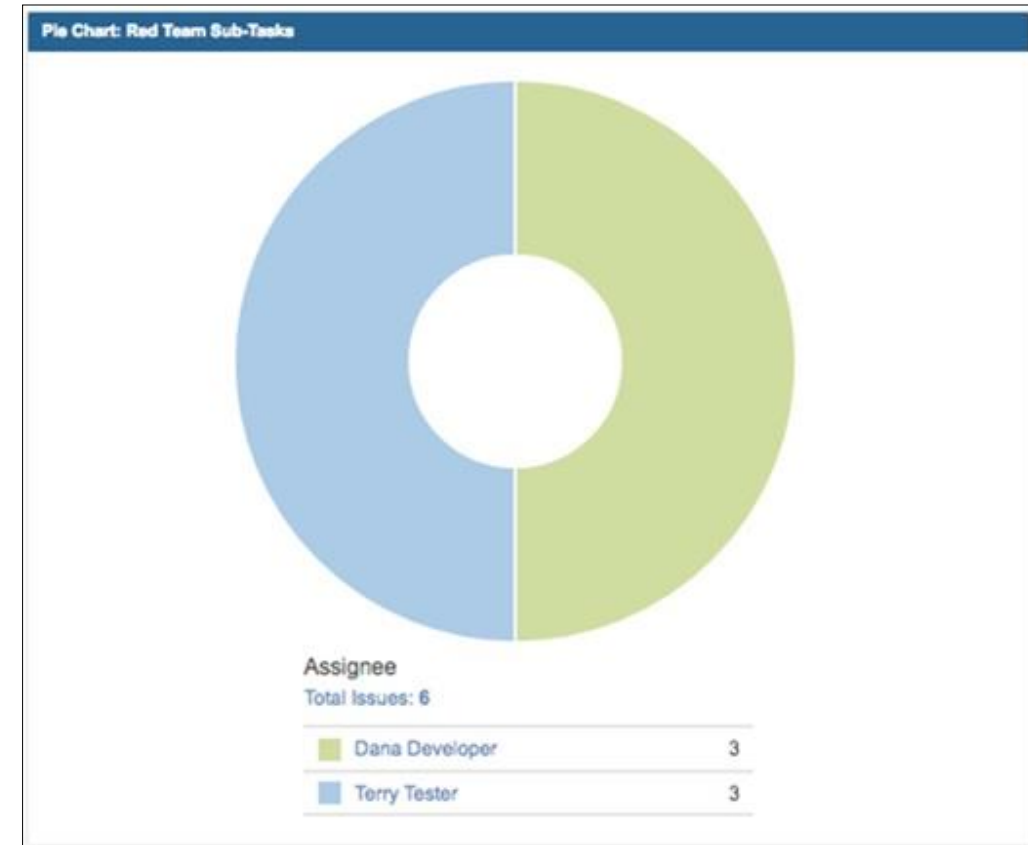
Jira Dashboard - Sprint Health Gadget

- How many days in the current Sprint has elapsed. Represented in percentage.
- How many work items are completed in the current sprint. Represented in percentage.
- How many Work Items were added or deleted from the current sprint commitment. Represented in percentage.
- How many days are left in the current Sprint.
- How many work items are flagged in the current Sprint.
- Who are assigned to Work Items in the current Sprint.



Jira Dashboard – Sub Tasks Pie Chart

- Allocation of sub-tasks to team members in the Current Sprint. Assignees are team members on the Scrum team.
- Total count of sub-tasks across all team members and for each team member.



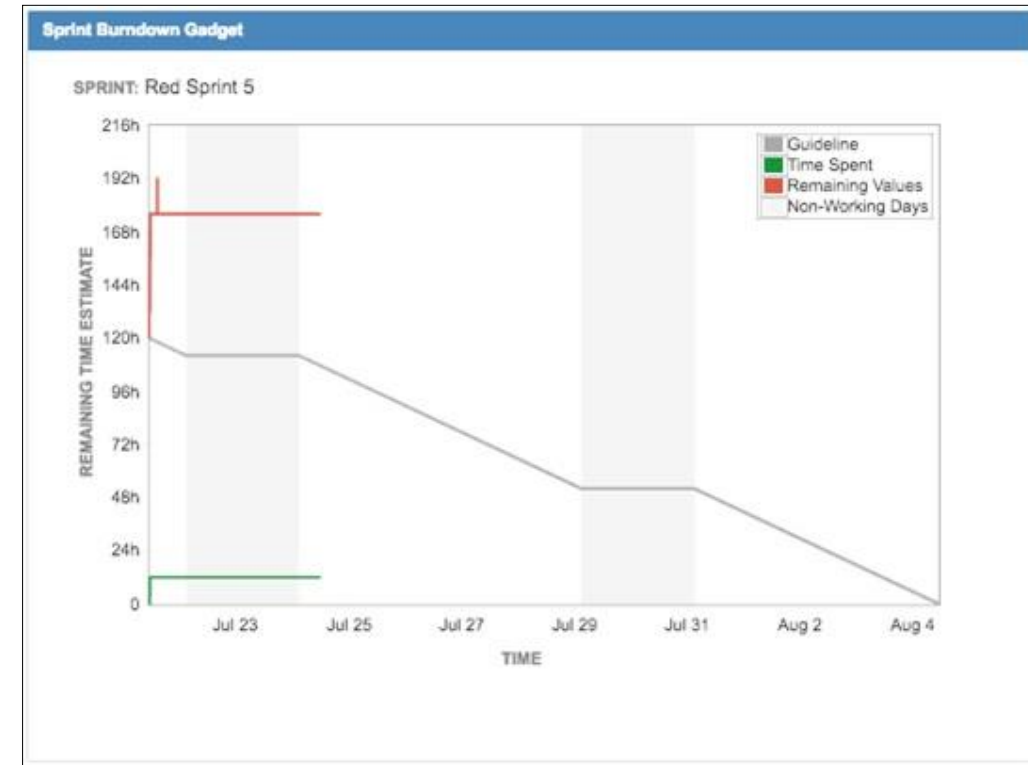
Jira Dashboard – Issue Statistics

- Breakdown of issue types committed to the current sprint.
- Issue types are defects, technical stories, user stories, and spikes.
- Percentage of issue types allocated within the current Sprint.
- Total count of all issue types committed to the current Sprint.

Issue Statistics: Red Team Issue Count (Issue Type)			
Issue Type	Count	Percentage	
 Defect	1		25%
 Spike	1		25%
 Story	1		25%
 Tech Story	1		25%
Total	4		

Jira Dashboard – Sprint Burndown Gadget

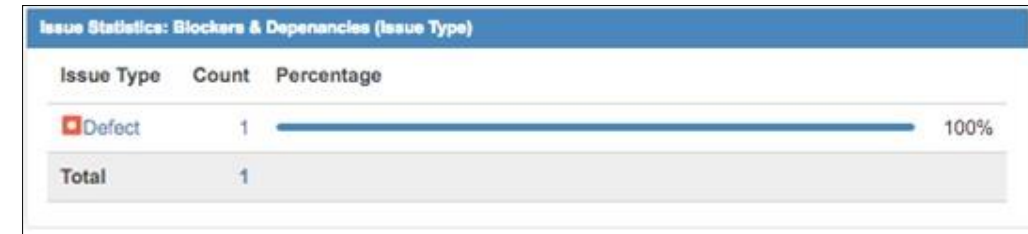
- Y-axis is in Hours.
- X-axis is in Days.
- The gray line is the ideal burndown for the current Sprint.
- The red line represents in the remaining hours in real time for the current Sprint.
- The green line represents actual time spent for the current Sprint.



Jira Dashboard – Issue Statistics(Blockers)

- Allocation of issues that are blocked by issue type. Represented in percentage.
- Total count of all issues that are blocked and by issue type.

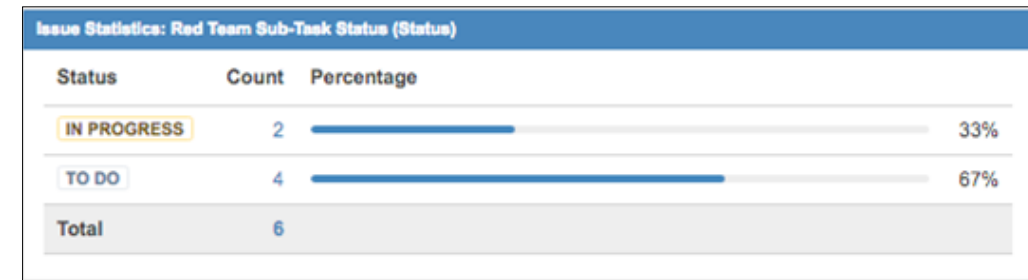
“Block” will be a State in the Workflow and used in the gadget to represent the “blocked” Issue Types.



Jira Dashboard – Issue Statistics(Status based)

- Number of issues that are “To Do”, In Progress, and “Complete”. Represented in percentage.
- Total count of all issues that are blocked and by issue type.

State in the Workflow will be used in the gadget to represent the “Status” Issue Types.



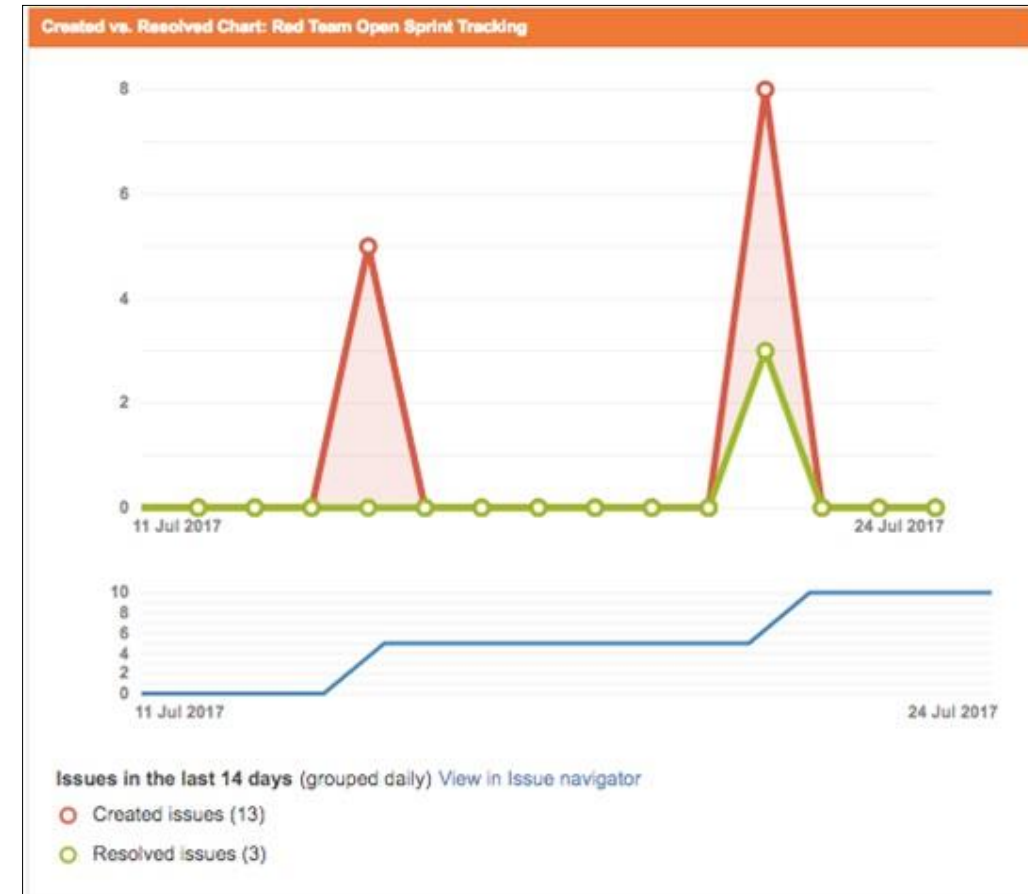
Jira Dashboard – Issue Statistics(Assignee based)

- Sub tasks that were re-opened after moved to the complete state. Represented in percentage.
- Allocations of sub tasks re-opened for each assignee.
- Total count of all sub tasks that are re-open and by assignee.



Jira Dashboard – Created Vs Resolved Chart

- Number of issues created and closed (accepted) in the current Sprint (14 days).
- Tally of created issues in the current Sprint.
- Tally of resolved issues in the current Sprint.



Scrum Board

 Dashboards ▾ Projects ▾ Issues ▾ Agile ▾ **Create**

Search   

ss-scrum-board

Backlog Active sprints Reports Board ▾

SPRINT: Sprint 3 ▾ QUICK FILTERS: Only My Issues Recently Updated

To Do

In Progress

Done

ITSS-116 OPEN 3 sub-tasks story 3 test issue

ITSS-117
↑ sub task1 of itss-116

ITSS-118
↑ sub task 2 of itss-116

ITSS-119
↑ sub task 3 of itss-112

27

- Displays the sub tasks in the current Sprint and what state they are in.
- Sub-tasks will have the Story name associated with it.
- Individual filters can be applied to only show the sub tasks for a given assignee. ** This can be useful during the standup.*

Creating/Edit/View Issues in Jira

Create/Edit/View Issue Screen - Epic

- “*” indicate mandatory fields.
- Summary field indicates the title of the Epic.
- Narrative field will have a pre-defined format (e.g. Role, Action, Value).
- Description field allows the Product Owner/Tech Lead to add more details about the Epic.

The screenshot shows the 'Create issue' interface for an Epic. At the top right is a 'Configure fields' button. The form includes the following fields:

- Project***: A dropdown menu showing 'Lending (LEND)'.
- Issue Type***: A dropdown menu showing 'Epic'. Below it, a note states: 'Some issue types are unavailable due to incompatible field configuration and/or workflow associations.'
- Summary***: A text input field.
- Reporter***: A dropdown menu showing 'Bryan McMillan'. Below it, a note says: 'Start typing to get a list of possible matches.'
- Assignee**: A dropdown menu showing 'Automatic'. Below it, a link says 'Assign to me'.
- Priority**: A dropdown menu showing 'Medium'. To its right is a help icon.
- Epic Name***: A text input field. Below it, a note says: 'Provide a short name to identify this epic.'
- Component/s***: A dropdown menu. Below it, a note says: 'Start typing to get a list of possible matches or press down to select.'
- Labels**: A dropdown menu. Below it, a note says: 'Begin typing to find and create labels or press down to select a suggested label.'
- Narrative**: A large text area.
- Description***: A rich text editor with a toolbar containing options like Style, Bold, Italic, Underline, Text Color, Background Color, Link, Unlink, Bulleted List, Numbered List, Table, and more. Below the toolbar is a large text area for the description.

Create/Edit/View Issue Screen - Epic...

- Acceptance criteria for an Epic is at a high level and each line item can potentially be broken into one to many stories.
- Affected Version/s is where the “defects” were found that need to be fixed.
- Fix version is the version you will release with the fix/enhancement and/or new functionality.
- Linked Issues defined the relationship between two issue types.

The screenshot shows a form for creating or editing an issue. The form includes the following fields and controls:

- Acceptance Criteria:** A large text area for entering acceptance criteria.
- T-Shirt Size:** A dropdown menu with "None" selected.
- High Level Estimate:** A text input field.
- Affects Version/s:** A dropdown menu with a search prompt: "Start typing to get a list of possible matches or press down to select."
- Fix Version/s:** A dropdown menu with a search prompt: "Start typing to get a list of possible matches or press down to select."
- Linked Issues:** A dropdown menu with "Depends On" selected.
- Issue:** A dropdown menu with a search prompt: "Begin typing to search for issues to link. If you leave it blank, no link will be made."
- Attachment:** A dashed box with a cloud icon and the text "Drop files to attach, or browse."

At the bottom right, there are three buttons: "Create another" (disabled), "Create" (active), and "Cancel".

Create/Edit/View Issue Screen - Story

- “*” indicate mandatory fields.
- Summary field indicates the title of the User Story.
- Narrative field will have a pre-defined format (e.g. Role, Action, Value).
- All Issue Types should be linked to the appropriate Epic.
- Description field allows the Product Owner/Tech Lead to add more details about the User Story.

The screenshot shows the 'Create issue' interface for a 'Story' type issue. The form includes the following fields and options:

- Project:** A dropdown menu set to 'Lending (LEND)'.
- Issue Type:** A dropdown menu set to 'Story'. A note below states: 'Some issue types are unavailable due to incompatible field configuration and/or workflow associations.'
- Summary:** A text input field with a blue border, currently empty.
- Reporter:** A dropdown menu set to 'Bryan McMillan'.
- Assignee:** A dropdown menu set to 'Automatic'. Below it is a link that says 'Assign to me'.
- Priority:** A dropdown menu set to 'Medium'.
- Component/s:** A dropdown menu.
- Labels:** A dropdown menu.
- Epic Link:** A dropdown menu.
- Narrative:** A large text area for the narrative.
- Description:** A rich text editor with a toolbar containing options like 'Style', 'B', 'I', 'U', 'A', 'A', 'Link', 'Image', 'List', 'Table', 'Quote', and 'More'.

Create Issue/Edit/View Screen – Story...

- User Stories will typically be capitalized.
- Acceptance criteria for a User Story is what the team members will develop and test against.
- Affected Version/s is where the “defects” were found that need to be fixed.
- Fix version is the version you will release with the fix/enhancement and/or new functionality.
- Linked Issues defined the relationship between two issue types.
- When a User Story meets the definition Ready based on progressive elaboration, it will be marked as “Ready” and can then be pulled into a Sprint.
- You don’t have to fill in the Original and Remaining Estimate since we are using points at the Issue Type level.

The screenshot displays the JIRA 'Create Issue/Edit/View Screen – Story...' form. The form includes the following fields and options:

- Cap/Exp:** A dropdown menu set to 'None'.
- Acceptance Criteria:** A large text area for describing acceptance criteria.
- Story Points:** A text input field with a description: 'Measurement of complexity and/or size of a requirement.'
- Agile Team:** A dropdown menu set to 'None'.
- Affects Version/s:** A dropdown menu with a hint: 'Start typing to get a list of possible matches or press down to select.'
- Fix Version/s:** A dropdown menu with a hint: 'Start typing to get a list of possible matches or press down to select.'
- Display on Impediment Board:** A dropdown menu set to 'None'.
- Sprint:** A dropdown menu with a hint: 'JIRA Software sprint field'.
- Story Ready:** A checkbox labeled 'Ready'.
- MTM Test Case ID# and Iterations:** A text input field.
- Linked Issues:** A dropdown menu set to 'Depends On'.
- Issue:** A dropdown menu with a hint: 'Begin typing to search for issues to link. If you leave it blank, no link will be made.'
- Attachment:** A dashed box with a cloud icon and the text 'Drop files to attach, or browse.'
- Original Estimate:** A text input field with a hint: '(eg. 3w 4d 12h) ?' and a description: 'The original estimate of how much work is involved in resolving this issue.'
- Remaining Estimate:** A text input field with a hint: '(eg. 3w 4d 12h) ?' and a description: 'An estimate of how much work remains until this issue will be resolved.'

At the bottom right, there are three buttons: 'Create another' (with a plus icon), 'Create' (in blue), and 'Cancel'.

Create Issue/Edit/View Screen - Defect

- “*” indicate mandatory fields.
- Summary field indicates the title of the Defect.
- All Issue Types should be linked to the appropriate Epic.
- Severity and Defect Priority is defined in the Screenshot.

Create issue

Configure fields

Project*

Lending (LEND)

Issue Type*

Defect

Some issue types are unavailable due to incompatible field configuration and/or workflow associations.

Summary*

Reporter*

Bryan McMillan

Start typing to get a list of possible matches.

Assignee

Automatic

Assign to me

Severity

None

Sev	Description
1	Represents *any defect or connectivity issue that renders a system unusable. The system, application or function is inoperable without any workaround.
2	Represents *any defect that causes an essential component of the system to malfunction. For Severity 2 issues, a workaround may be available.
3	Represents *any defect where the system/application is usable but not functioning in accordance with the user documentation or internal specifications. The error condition would have no substantial impact on the user's operation.
4	Represents any defect where *the system/application is usable and functioning in accordance with the business/functional specifications; however some minor (cosmetic) problems are present.

Defect Priority

None

Defect Priority	Description
Emergency	The issue has a legal, operational, financial or firm reputation risk if not corrected and is a non-discretionary need. This will not always tie directly to Severity
High	The issue requires immediate attention with a plan of action to resolve within a given period of time.
Medium	User community impacted – requires attention but must be prioritized behind issues of higher priority and/or severity. This priority must be combined with Severity to determine plan of action if necessary.
Low	The system/application is usable and functioning in accordance with the user documentation or internal specifications for the applicable release of the software; however some minor problems are present. May be deferred or closed depending on the severity of the issue.

Epic Link

Choose an epic to assign this issue to.

Component/s

Start typing to get a list of possible matches or press down to select.

Create Issue/Edit/View Screen – Defect...

- Description field allows the Team Member to add more details about the Defect.
- Environment found in can be Dev, Test, UAT, Prod.
- Display on Impediment board allows you to show the defect on a separate board for tracking and visibility purpose.
- Affected Version/s is where the “defects” were found that need to be fixed.
- Fix version is the version you will release with the fix/enhancement and/or new functionality.
- Linked Issues defined the relationship between two issue types.

The screenshot displays the JIRA 'Create Issue/Edit/View Screen – Defect...' form. The form includes the following fields and options:

- Component/s:** A dropdown menu with a search prompt: 'Start typing to get a list of possible matches or press down to select.'
- Labels:** A dropdown menu with a search prompt: 'Begin typing to find and create labels or press down to select a suggested label.'
- Env. Found In:** A dropdown menu currently set to 'None'.
- Description:** A rich text editor with a toolbar containing options for Style, Bold (B), Italic (I), Underline (U), Text Color (A), Background Color (A), Link, Unlink, Bulleted List, Numbered List, Emoji, and a plus sign for more options.
- Story Points:** A text input field with a measurement prompt: 'Measurement of complexity and/or size of a requirement.'
- Sprint:** A dropdown menu with the label 'JIRA Software sprint field'.
- Agile Team:** A dropdown menu currently set to 'None'.
- Display on Impediment Board:** A dropdown menu currently set to 'None'.
- Affects Version/s:** A dropdown menu with a search prompt: 'Start typing to get a list of possible matches or press down to select.'
- Fix Version/s:** A dropdown menu with a search prompt: 'Start typing to get a list of possible matches or press down to select.'
- MTM Test Case ID# and Iterations:** A text input field.
- Linked Issues:** A dropdown menu currently set to 'Depends On'.
- Issue:** A dropdown menu with a search prompt: 'Begin typing to search for issues to link. If you leave it blank, no link will be made.'
- Attachment:** A dashed box with a cloud icon and the text 'Drop files to attach, or browse.'

At the bottom right of the form, there are three buttons: 'Create another', 'Create', and 'Cancel'.

Copying Epics/Stories from Confluence to Jira

Copying Epics/Stories from Confluence to Jira

- Step 1 - create a Product Requirement in Confluence.
- Step 2 - fill out the form as it comes up in edit mode when creating it.

Copying Epics/Stories from Confluence to Jira...

- Step 3 - is to tie the Epic(s) if they are existing or create Epic(s) for the Product Requirements:

The screenshot shows a Confluence page titled "Product Requirement with Screen Mockup" with a sidebar containing "Page properties" and "Goals". An "Insert JIRA Issue/Filter" dialog box is open in the center, displaying a search for "IssueType=Epic" and a list of Jira epics. The dialog box has a "Search" section with "Create New Issue" and "Recently Viewed" links. Below this, it shows "OTHER JIRA CONTENT" and "JIRA Charts". The main list of epics includes columns for "Key" and "Summary".

Key	Summary
LEND-98	New Feature for Lending
LEND-75	"Demonstration Epic to track Demo Work"
LEND-51	New Feature X
LEND-48	New Epic for Mr. Tim
LEND-30	[EPIC] User Feature
LEND-25	[EPIC] Product Owner Feature
LEND-24	[EPIC] Developer Feature

The dialog box also includes a "Display options" section and "Insert" and "Cancel" buttons. At the bottom of the dialog, there is a "Select Macro" button and a hint: "Hint: type 'Cmd+Shift+J' in the editor to quickly access this dialog."

The background page shows the "Page properties" sidebar with the following information:

Target release	Version 2.0
Epic	JIRA LEND-25
Document status	DRAFT
Document owner	Bryan McMillan
Designer	Lead designer
Developers	Lead developer
QA	Lead tester

The "Goals" section includes a bullet point: "E.g. Simplify the user experience, reduce friction etc...". The "Background and strategic fit" section has the text: "Why are you doing this? How does this relate to your overall product strategy?". The "Assumptions" section is empty.

The bottom of the page features a "What did you change?" input field, a "Notify watchers" checkbox, a "Changes saved" status, and a "Publish" button.

Copying Epics/Stories from Confluence to Jira...

- Step 4 is to fill out the Requirements table:

Requirements

#	Title	User Story	Importance	Notes
1	Feature 1	As a User I need a	Required	• Additional considerations or noteworthy references (links, issues)
2	Feature 2	As a User I need a	Required	• Additional considerations or noteworthy references (links, issues)

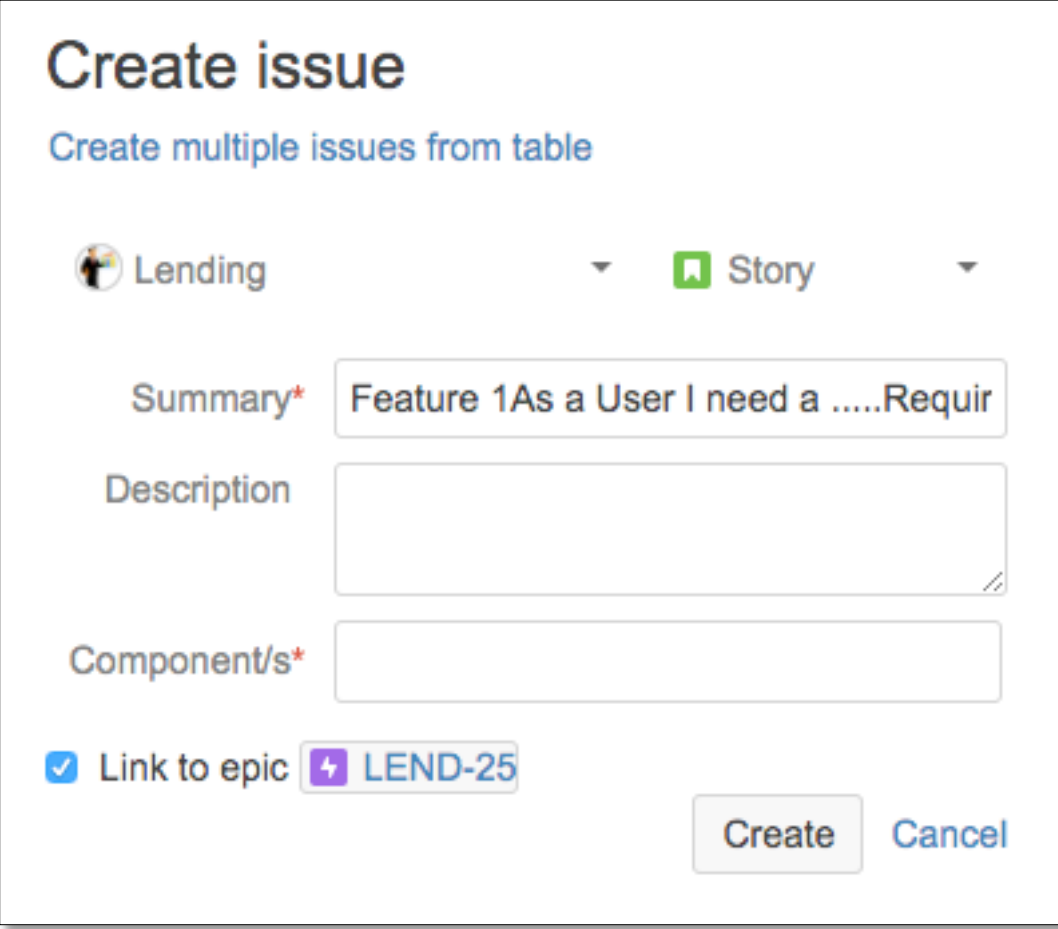
Copying Epics/Stories from Confluence to Jira...

- Step 5 – finish completing the Product Requirement page then save it.
- Step 6 – Select the requirements in the Requirements Table then mouse over to get the Icon showing the Jira Icon as follows:

Requirements				
#	 	User Story	Importance	Notes
1	Feature 1	As a User I need a	Required	•
2	Feature 2	As a User I need a	Required	•

Copying Epics/Stories from Confluence to Jira...

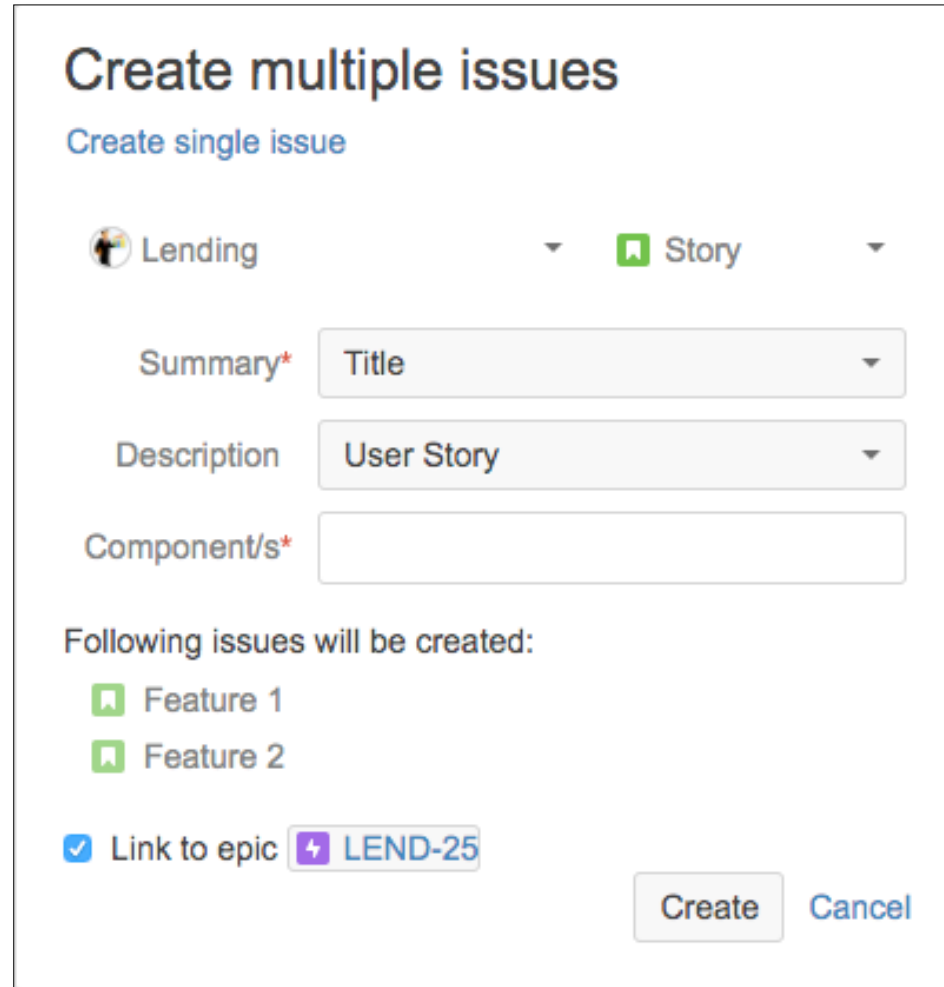
- Step 7 – Select the Jira Icon and see that this window appears:
** Make sure the correct Jira project and Issue Type are Selected.



The screenshot shows the 'Create issue' dialog box in Jira. At the top, it says 'Create issue' in bold, followed by 'Create multiple issues from table' in a smaller blue font. Below this, there are two dropdown menus: the first is labeled 'Lending' with a person icon, and the second is labeled 'Story' with a green square icon. The 'Summary*' field contains the text 'Feature 1As a User I need aRequir'. The 'Description' field is empty. The 'Component/s*' field is also empty. At the bottom left, there is a checked checkbox labeled 'Link to epic' followed by a purple lightning bolt icon and the text 'LEND-25'. At the bottom right, there are two buttons: 'Create' and 'Cancel'.

Copying Epics/Stories from Confluence to Jira...

- Step 8 – If you are creating multiple issues then click on the “Create multiple issues from table” link on the top of the window (shown below)



The screenshot shows the 'Create multiple issues' dialog box in Jira. At the top, there is a title 'Create multiple issues' and a link 'Create single issue'. Below this, there are two dropdown menus: the first is set to 'Lending' with a user icon, and the second is set to 'Story' with a green square icon. Underneath, there are three input fields: 'Summary*' with a dropdown menu showing 'Title', 'Description' with a dropdown menu showing 'User Story', and 'Component/s*' which is empty. Below these fields, it says 'Following issues will be created:' followed by two items: 'Feature 1' and 'Feature 2', each with a green square icon. At the bottom, there is a checkbox 'Link to epic' which is checked, and a dropdown menu showing 'LEND-25'. Finally, there are two buttons: 'Create' and 'Cancel'.

Copying Epics/Stories from Confluence to Jira...

- Step 9 – Completely select the appropriate fields for the Summary (normally the title), Description (normally the user story), and any mandatory fields.
- Step 10 – Click on the Create button.

Copying Epics/Stories from Confluence to Jira...

- Step 11 – all Jira issues 1 to N are created in the Jira Project and the Table will be updated as follows:

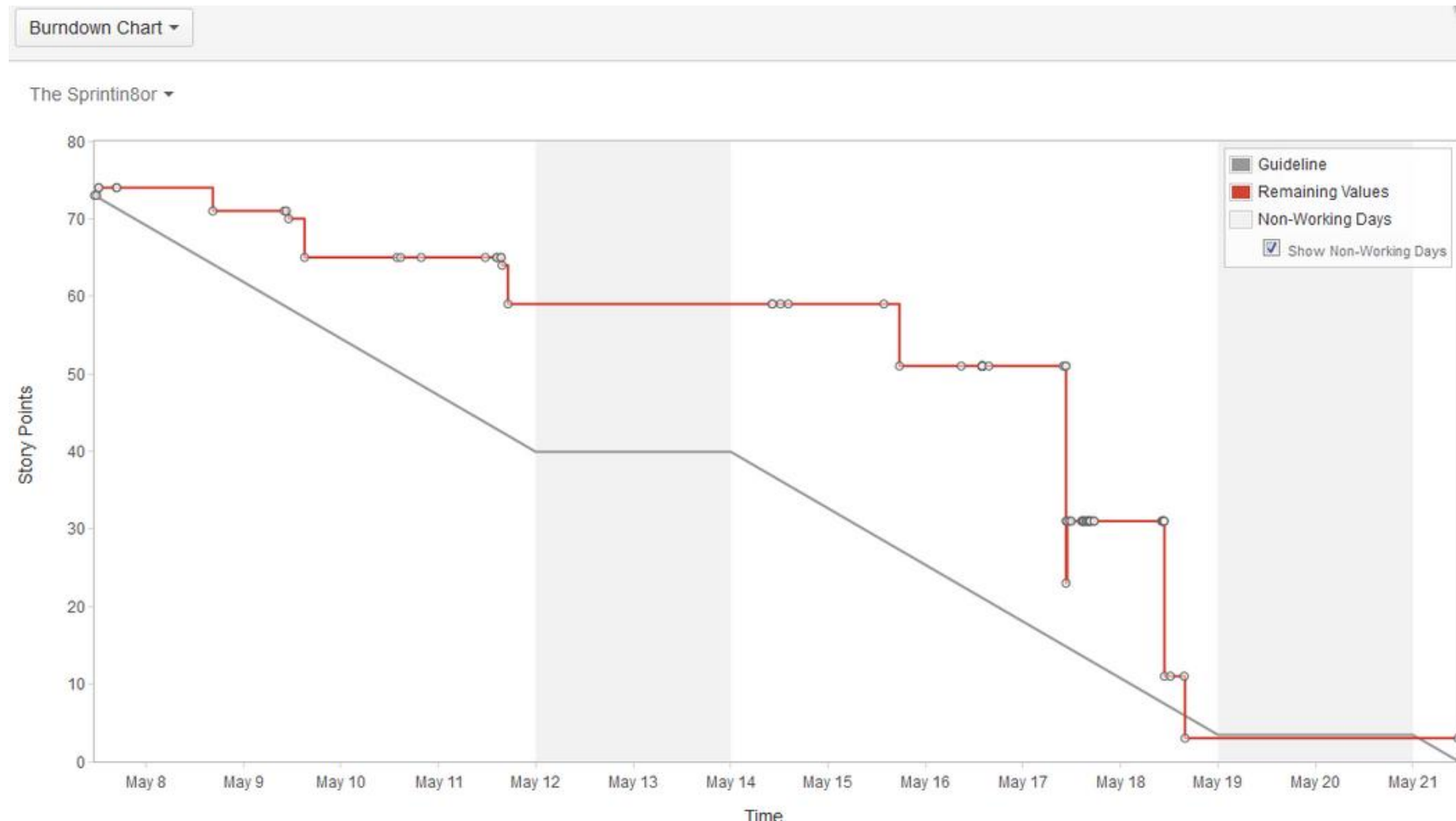
Requirements

#	Title	User Story	Importance	Notes
1	Feature 1  LEND-40 TO DO	As a User I need a	Must Have	•
2	Feature 2  LEND-41 TO DO	As a User I need a	Nice to Have	•

Jira Reports

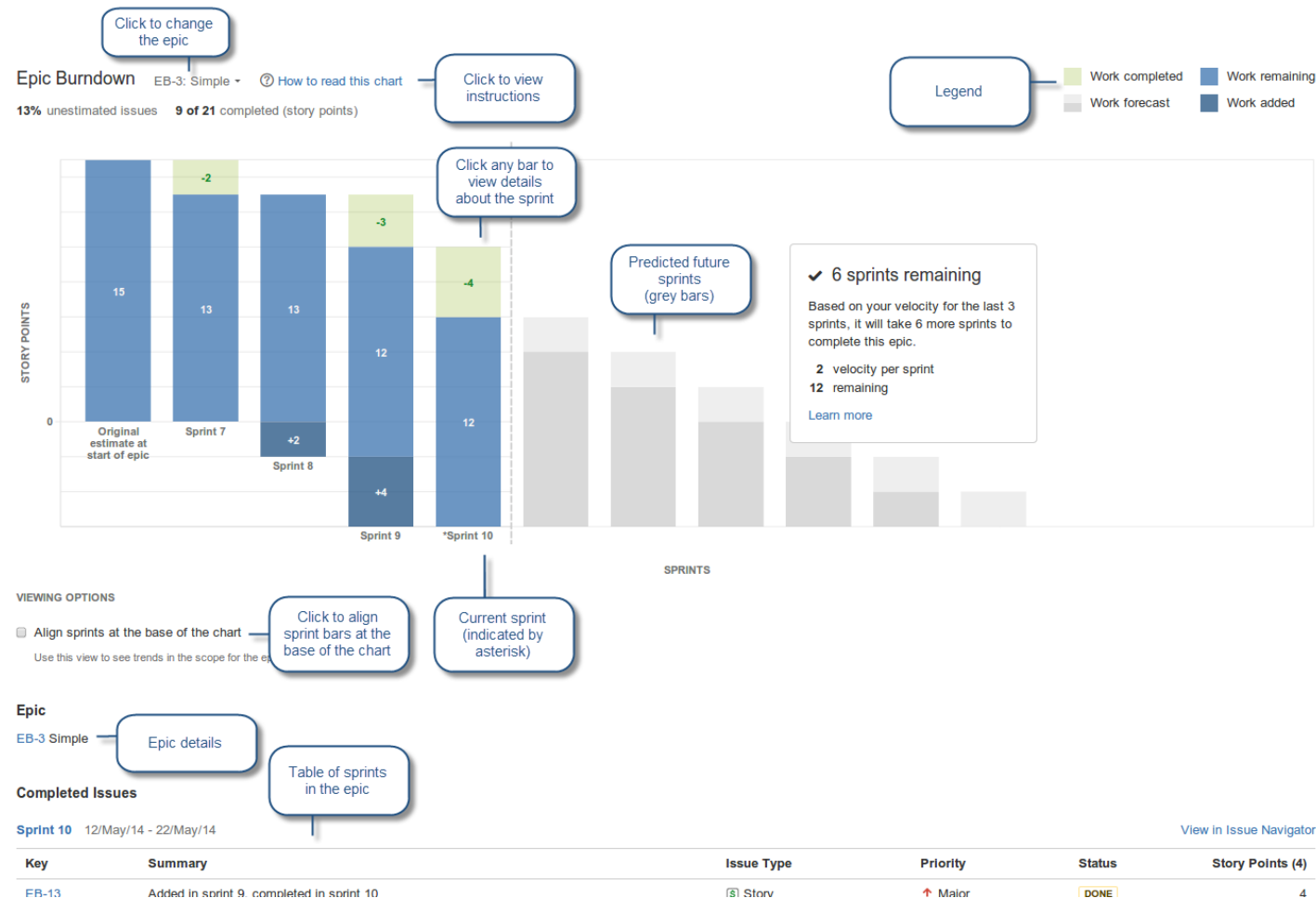
Burndown Chart

- This Burndown chart is in Points and shows the burndown of points as Stories get accepted within the current Sprint.

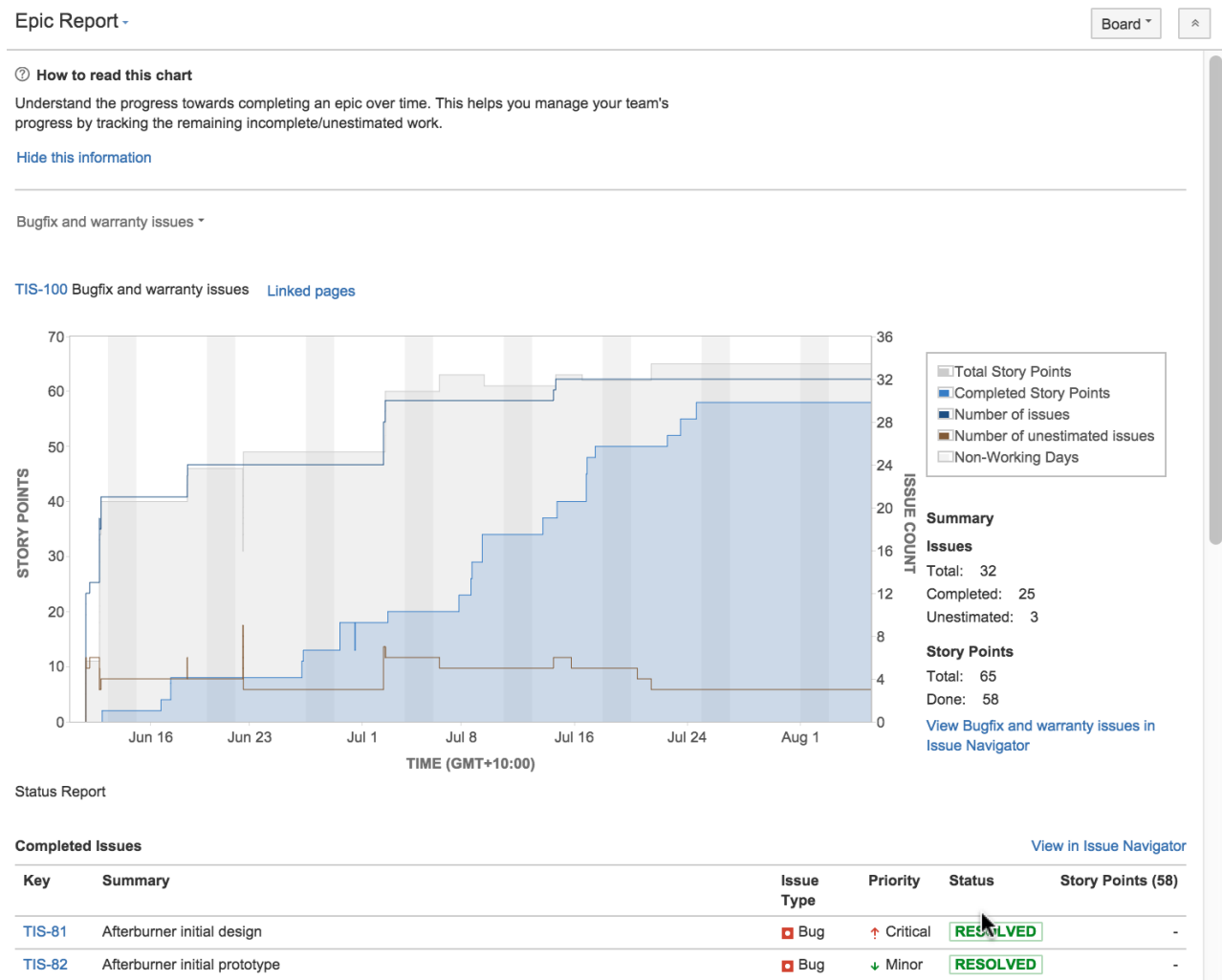


Epic Burndown Report

- Shows the burndown of points across all Stories linked to the Epic. A forecast to when the Epic will be completed can be calculated after a few Sprints.

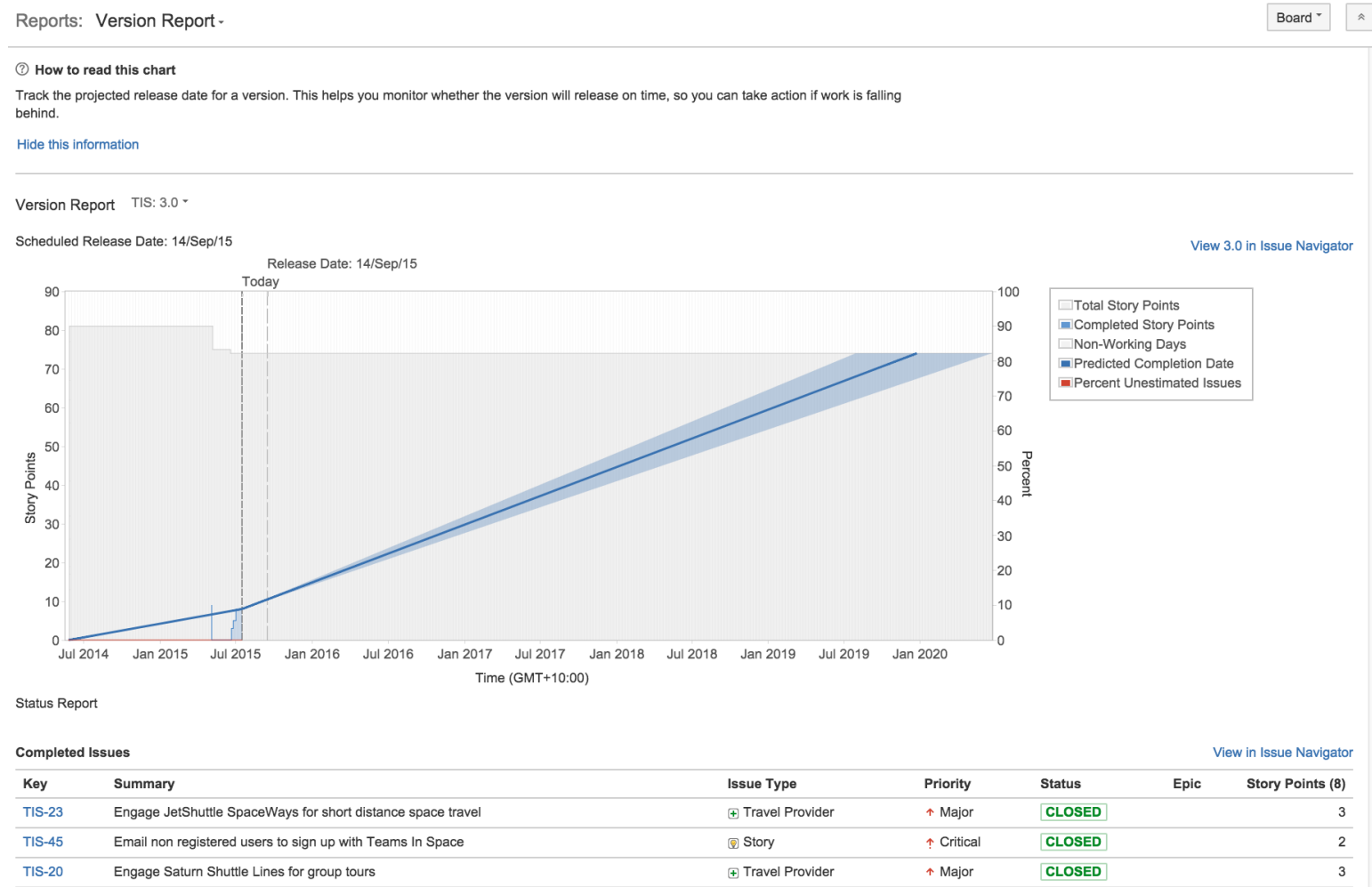


- The Epic report shows all the work items linked to the Epic, with the corresponding title (summary), issue type, priority, status, and points. A tally of story points, un-estimated work items, work items completed are also shown.



Version Report

- Version report shows the burnup of points (accepted) for all work items (e.g. User Stories) that is linked to a specific version. An ideal line is calculated to show if the program is on track to deliver all the committed points.



Sprint Report

- Sprint summary report shows the burndown chart, Work Items committed to the Sprint, title (summary) of the Work Item, Issue Type, Priority, Status, Story Point estimation.

