JIRA ADVANCED
Module 1

AGENDA

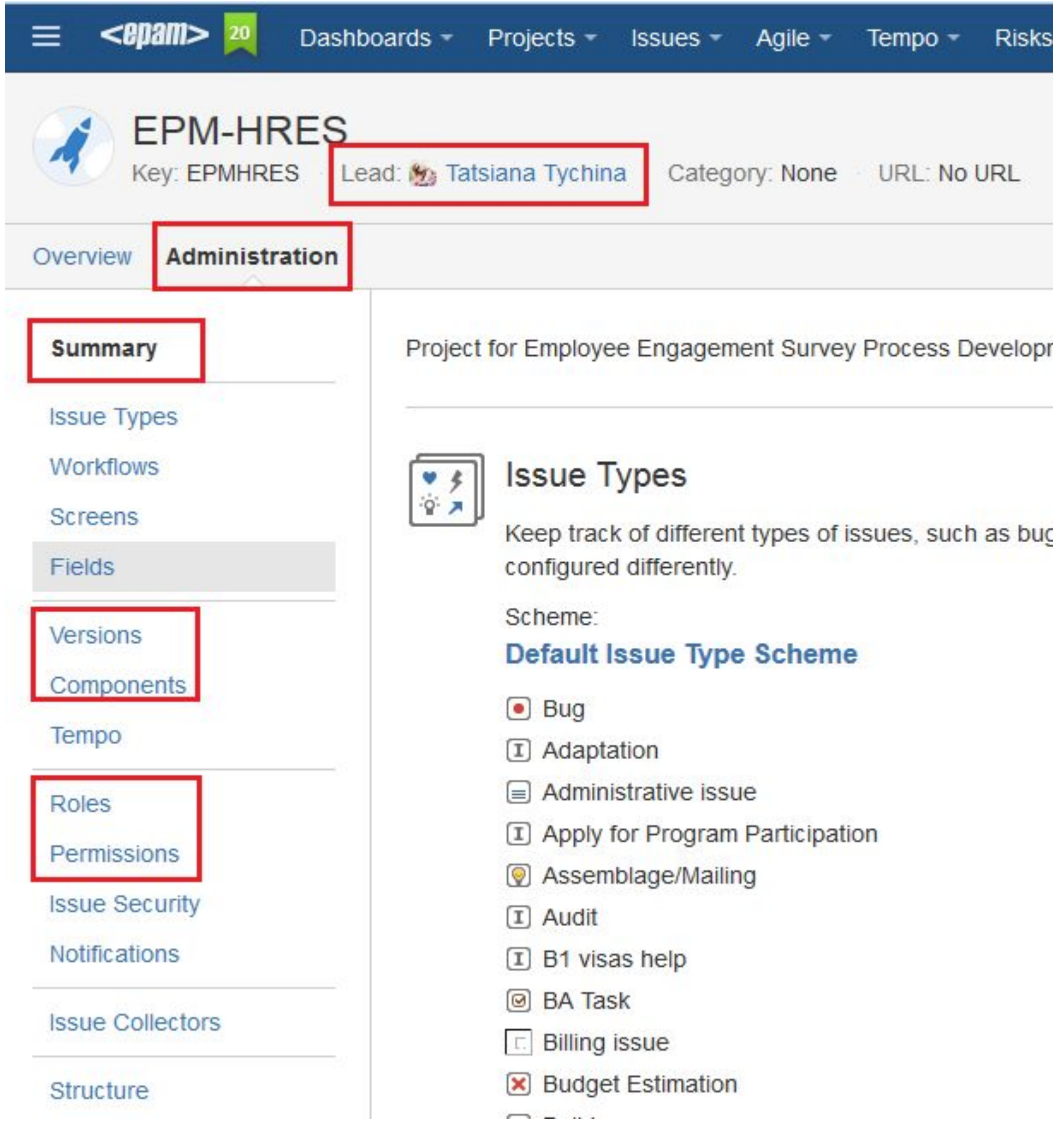
1. How to administer your JIRA project
   - Summary
   - Versions
   - Components
   - Roles / Permissions
2. Scrum and basic definition
3. Kanban and basic definition
4. Difference between Kanban and Scrum
5. JIRA Board
6. How to create JIRA Board
   - Create filters
   - Share filters
7. How to create JIRA Tracking Board (based on Kanban)
8. How to configure Tracking board
   - Columns
   - Swimlanes
   - Quick filters

HOW TO ADMINISTER YOUR JIRA PROJECT

Select Projects → your Project → Administration tab

5 main fields to configure:

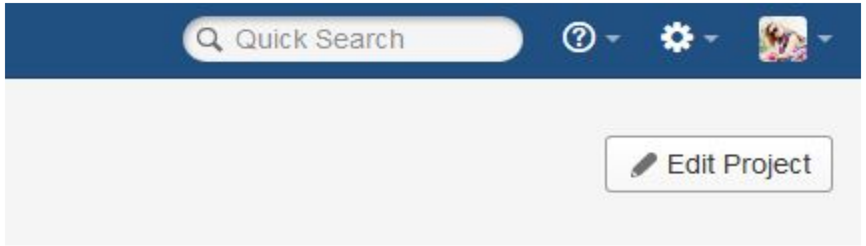
- Summary
- Versions
- Components
- Roles
- Permissions



HOW TO ADMINISTER YOUR JIRA PROJECT - SUMMARY

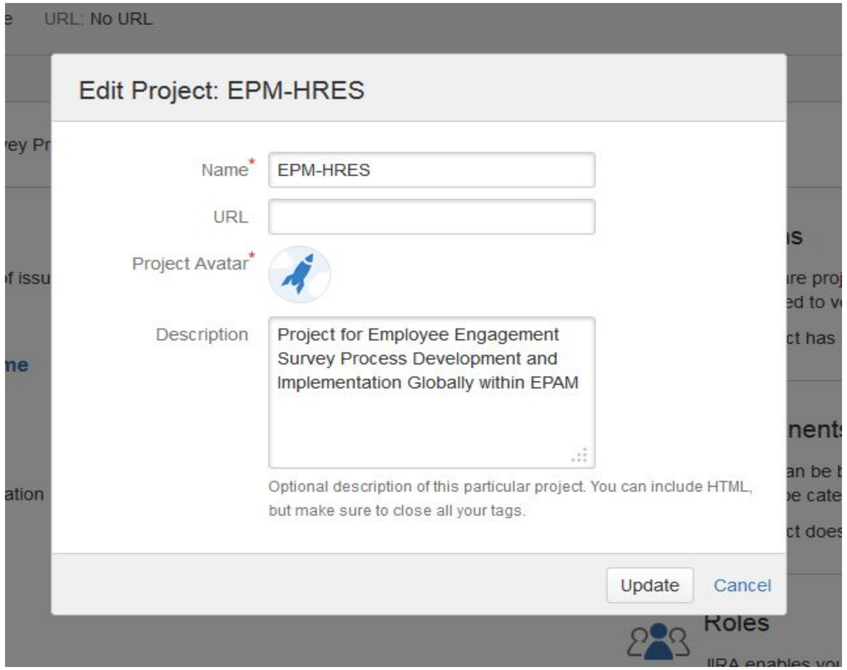
Summary – short project description

Click Edit Project



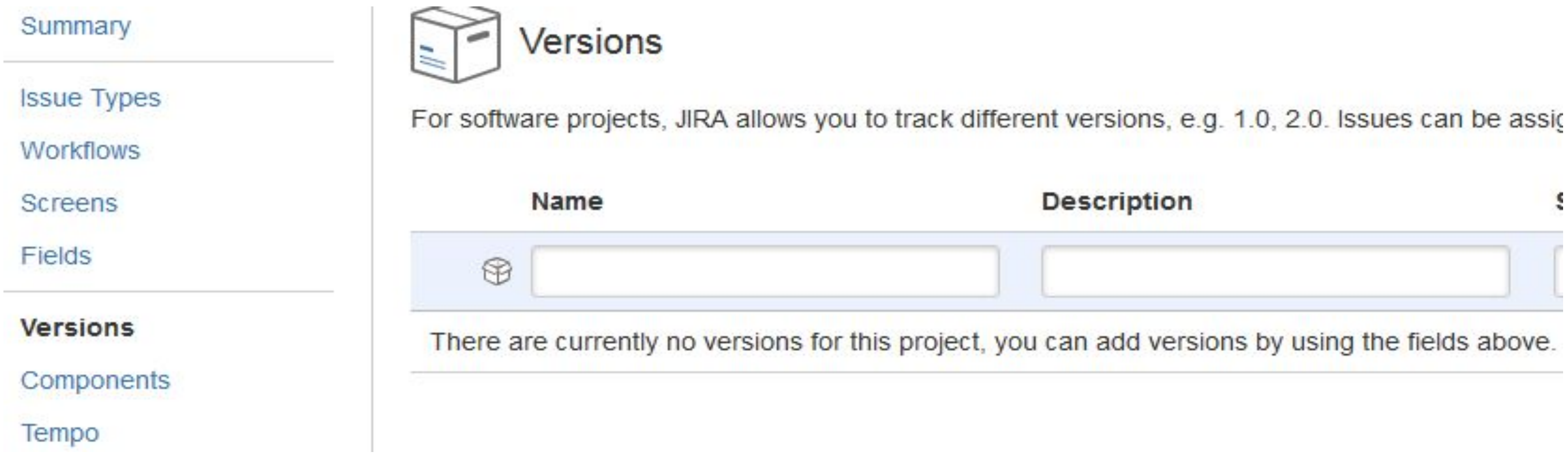
Fields to configure:

- Project Avatar
- Description



HOW TO ADMINISTER YOUR JIRA PROJECT – VERSIONS

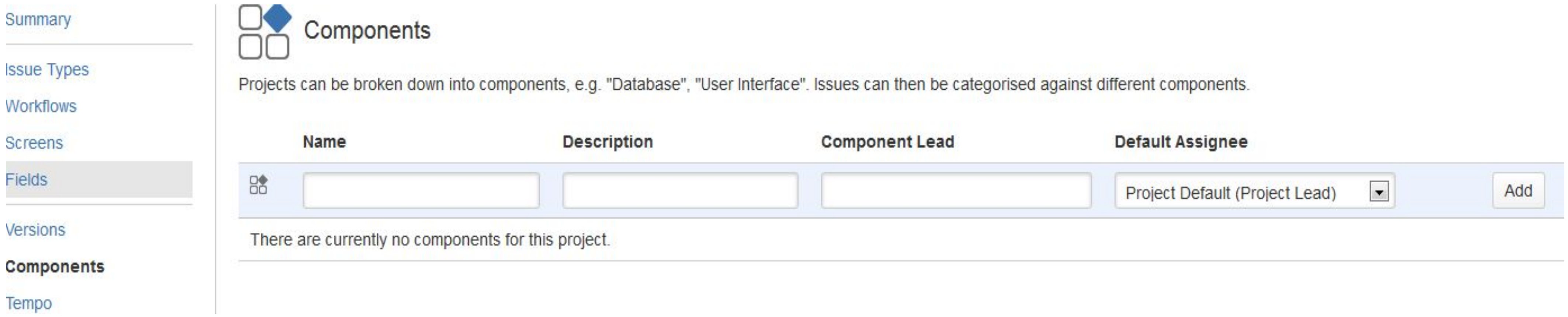
In the blue area, type the 'Name' and optional a 'Description', then click the '**Add**' button.



Example of Fix Versions within EPM-HRMT project – 'STD', 'MSTD', 'Travel' etc.

HOW TO ADMINISTER YOUR JIRA PROJECT – COMPONENTS

In the blue area, type the 'Name' and optional a 'Description', 'Component Lead' (if any), 'Default Assignee' and then click the '**Add**' button.



Example of Components within EPM-HRMT project – 'Action Item', 'Training', etc.

Link to the list of possible components:
https://kb.epam.com/display/EPMHRM/JIRA+Components

HOW TO ADMINISTER YOUR JIRA PROJECT – ROLES\PERMISSIONS

Project permissions allow you to control **who** can access your project, and **what** they can do. The permission scheme defines how the permissions are configured for this project.

Possible Permissions:

Project Permissions

Permission	Users / Groups / Project Roles
Administer Projects Ability to administer a project in JIRA.	Project Role (epam-administrator) Project Lead Group (jira-administrators) Group (jira-system-administrators)
Browse Projects Ability to browse projects and the issues within them.	Group (jira-system-administrators) Project Role (epam-team-leader) Single User (UJIT Tool) Project Lead Project Role (epam-external-user) Project Role (epam-administrator) Group (jira-administrators) Project Role (epam-user) Project Role (epam-member) Group (jira-readonly) Group (WFT Internal Auditors) Project Role (epam-developer) Single User (jira readonly) Project Role (epam-tester)
View Development Tools Allows users to view development-related information on the view issue screen, like commits, reviews and build information.	Group (jira-administrators) Group (jira-readonly) Project Role (epam-administrator) Project Lead Project Role (epam-developer) Project Role (epam-tester) Group (jira-system-administrators) Project Role (epam-team-leader)
View Read-Only Workflow	Group (WFT Internal Auditors)

HOW TO ADMINISTER YOUR JIRA PROJECT – ROLES\PERMISSIONS

JIRA enables you to allocate **particular people** to **specific roles** in your project. Roles are used when defining other settings, like notifications and permissions.

Project Roles:

Project Roles	Users	Groups
Administrators	Liudmila Glazunova, Nataliya Dolgikh, Tatsiana Tychina, Yana Sanko	
Business		
Business Analyst		
Client		
Developers		
epam-administrator	Auto EPM-RQUA Monitoring, Ievgen Kireiev, Liudmila Glazunova, Olena Polishchuk, Roman Bubiakin, Tatsiana Tychina, Yana Sanko, Yuliia Akhramovych	prj_EPMH-MSTD-administrators
epam-developer	Olga Punchak	prj_EPMH-MSTD-developers
epam-external-user		prj_EPMH-MSTD-external-users
epam-member	Katsiaryna Khatseyeva, Nastassia Burakova	prj_EPMH-MSTD-members
epam-team-leader		prj_EPMH-MSTD-team-leaders
epam-tester		prj_EPMH-MSTD-testers
epam-user	Katsiaryna Khatseyeva, Nastassia Burakova	prj_EPMH-MSTD-users

SCRUM AND BASIC DEFINITIONS

Scrum is an iterative and incremental agile software development framework for managing product development. It defines "a flexible, holistic product development strategy where a team works as a unit to reach a common goal" and enables teams to self-organize by encouraging physical co-location or close online collaboration of all team members, as well as daily face-to-face communication among all team members and disciplines in the project.

Scrum board is a board that was created using the "Scrum" preset

Sprint — also known as an iteration — is a short (ideally two to four week) period in which the development team implements and delivers a discrete product increment, e.g. a working milestone version.

A **sprint backlog** contains the list of tasks that need to be completed to implement the features planned for a particular Sprint. Ideally, each task in a sprint is relatively short and can be picked up by a team member rather than being assigned.

KANBAN AND BASIC DEFINITIONS

Kanban is a scheduling system for lean and just-in-time (JIT) production.

Kanban board — for teams that focus on managing and constraining their work-in-progress. Kanban boards are visible in Work mode but not in Plan mode.

Work mode is where you transition your cards (issues) through a series of columns (statuses).

DIFFERENCE BETWEEN KANBAN AND SCRUM

- Time box doesn’t use for tasks and sprints in Kanban.
- Size of tasks bigger than in Scrum, but number less.
- Deadline of tasks in Kanban is optional or doesn’t used at all.
- In Kanban «teams performers» is absent and considered only the average time of completed tasks.

JIRA BOARDS

Board displays issues from one or more projects, giving you a flexible way of viewing, managing and reporting on work in progress.

Boards in JIRA Agile:

- **Scrum board** — for teams that plan their work in sprints.
- **Kanban board** — for teams that focus on managing and constraining their work-in-progress.

HOW TO CREATE TRACKING BOARD – CREATE FILTER

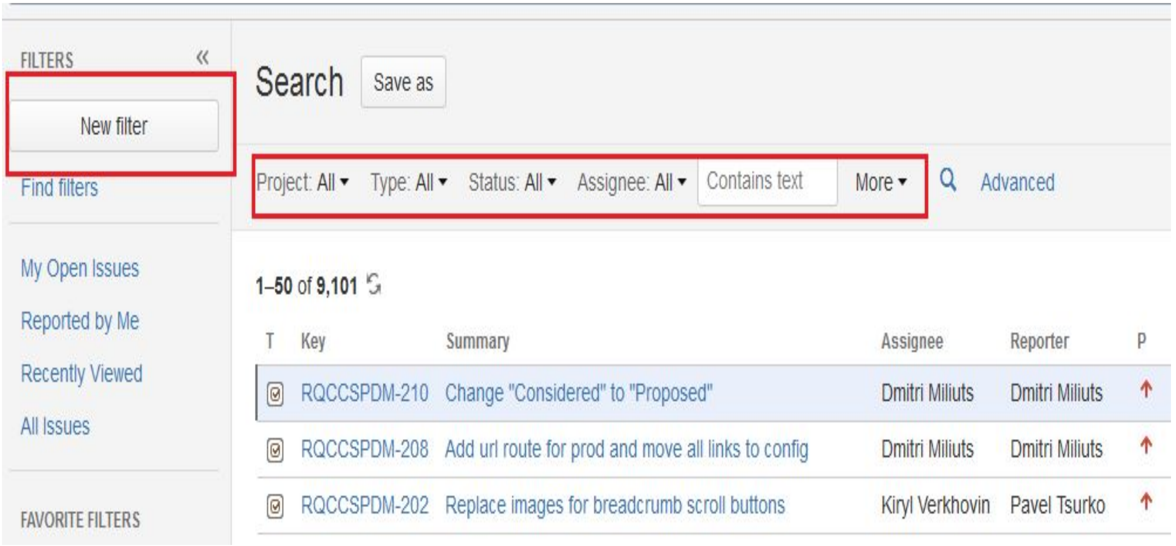
All Tracking Boards are based on Filters.

To create **Filter** for your Tracking board you need to perform the following actions:

1. Go to Issues tab
2. My open issues
3. New Filter
4. Set up the categories

(Project, Status, Assignee, Fix Version (add this field using **MORE** tab))

5. Save as button
6. Name your Filter
7. Submit

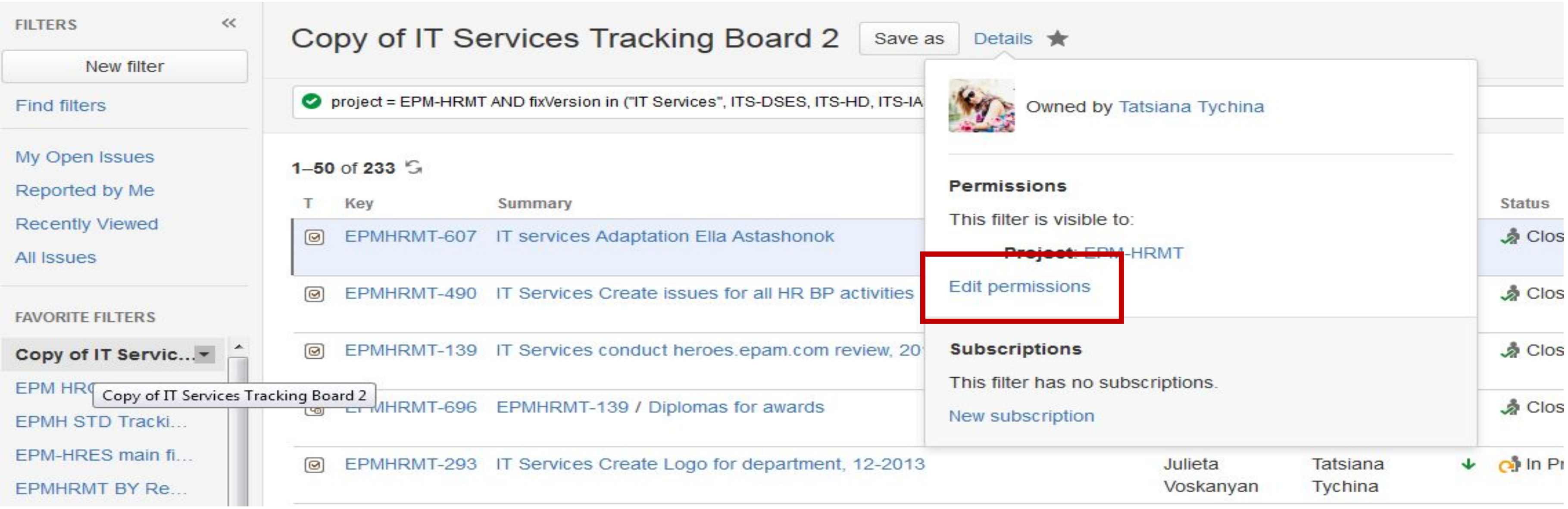


HOW TO CREATE TRACKING BOARD – SHARE FILTER

IMPORTANT!

For your project team members to have possibility viewing Tracking Board you need to SHARE Filter (which your Tracking Board based on) with Project or Group (DL)

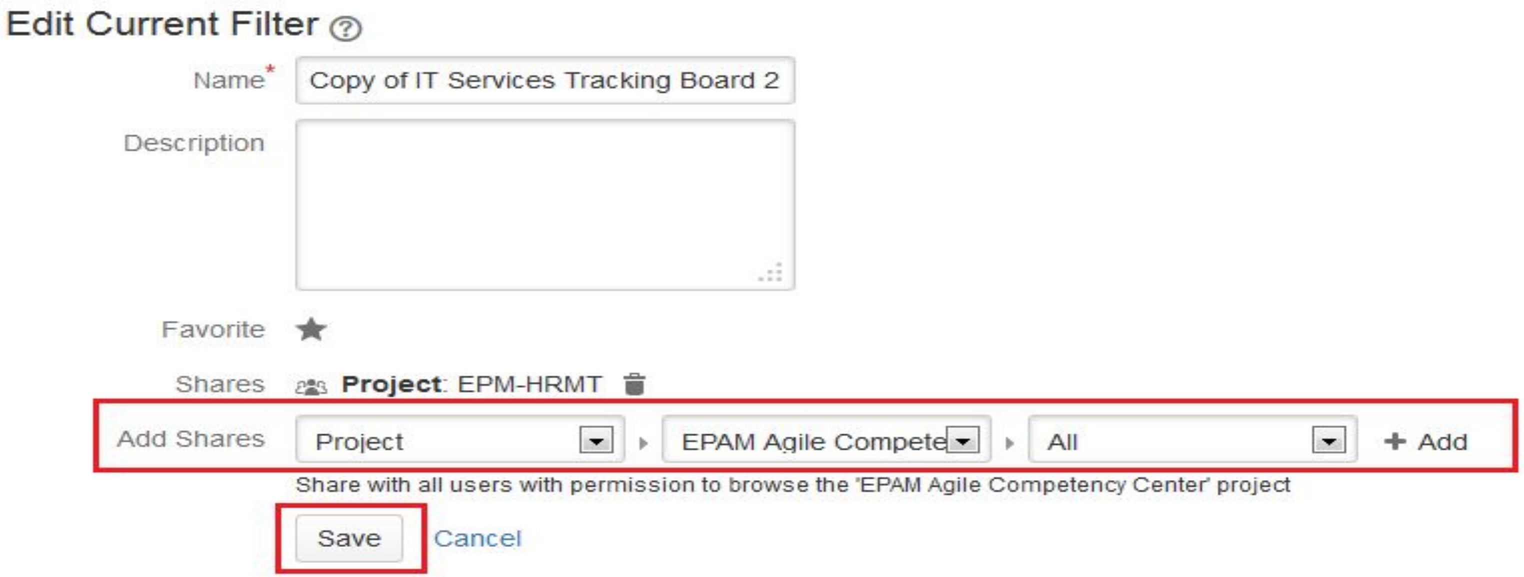
Choose the necessary Filter → Details → Edit permissions



HOW TO CREATE TRACKING BOARD – SHARE FILTER

For example you want to share your Filter with project members:

In the Add shares line → Project → select the destination project → press Add → Save



HOW TO CREATE TRACKING BOARD (based on Kanban)

To create new **Tracking Dashboard** the following actions are required:

Go to Agile tab (navigation panel) → Manage Boards → Create Board → Create a Kanban Board → choose Board from an existing Saved Filter → fill the necessary fields (in the field Saved filter choose your newly created Filter) → press create**.**

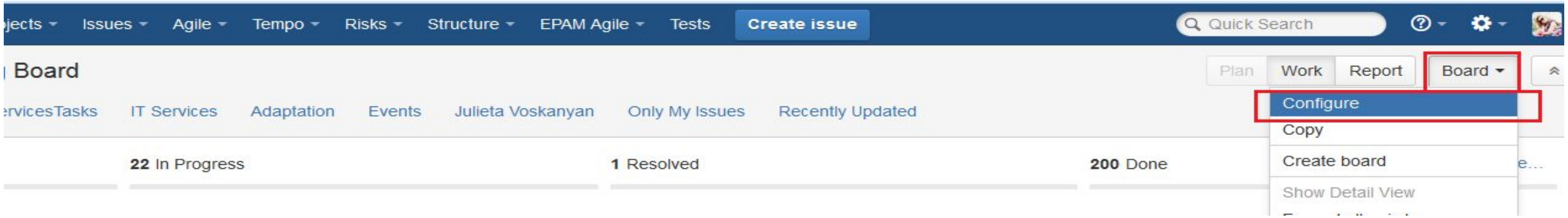
After that when you click on Agile tab you’ll see your newly created Tracking board.

Such board in the whole is based on the JQL filter (so tasks from multiple projects can appear in a single board).
For example: *project = EPMHRMT AND fixVersion = "TASK- MUD" ORDER BY Rank ASC*

HOW TO CONFIGURE TRACKING BOARD

To configure your newly created board you need to perform the following actions:

Choose the necessary board → in the upper right corner press on Board → select Configure option



On the screen appeared (in the left navigation pane) you may find 3 options that need to be configured for your Tracking Board:

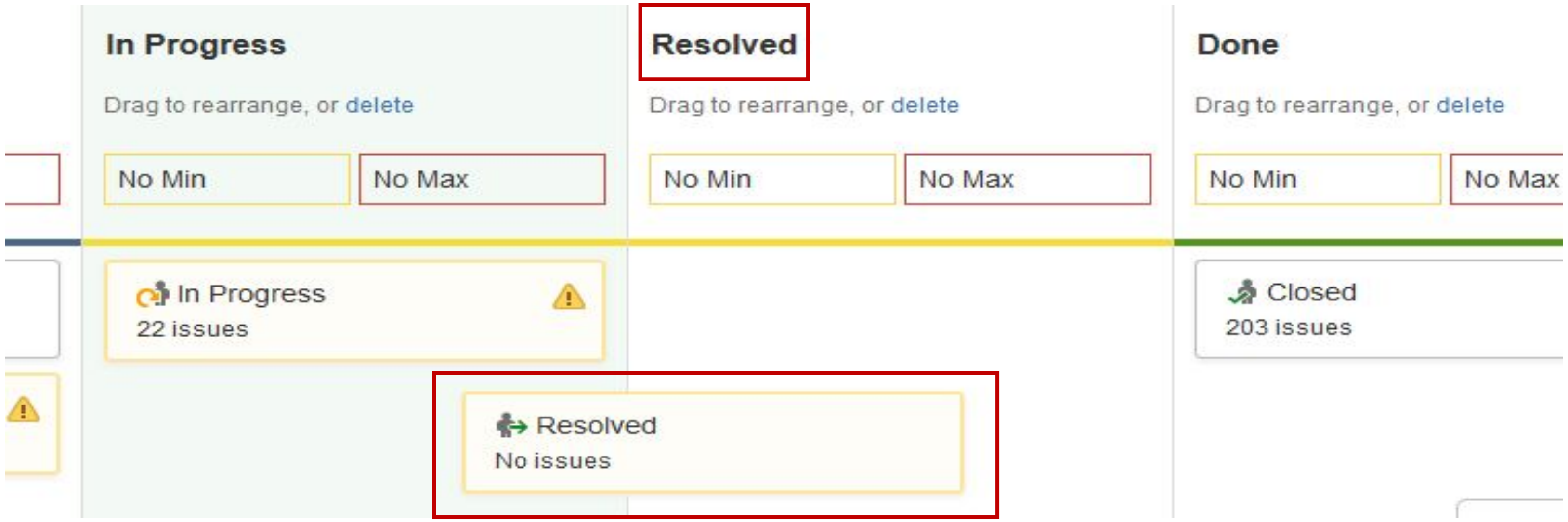
- Columns
- Swimlines
- Quick Filters

HOW TO CONFIGURE TRACKING BOARD - COLUMNS

By default, each board contains three columns, called 'To Do', 'In Progress' and 'Done'. You can add, delete, rename or move these columns if you wish.

Add a column:

Click the Add Column button → Click in the name area of the column, modify the existing name → Enter → Map a status to a column (Status Resolved to the column Resolved)



HOW TO CREATE TRACKING BOARD - SWIMLINES

A **swimlane** is a horizontal categorisation of issues in work mode on a board
Our swimlines base on Queries

Add a new swimlane:

In the blue area, type the Name, JQL, and optional Description, then click the Add button. Your new swimlane is added in the top swimlane position.

Base Swimlanes on: Queries

Group issues by custom queries. Queries are based on JQL that is additional to the saved filter of this board.

Name	JQL	Description	
			Add
This week	(status in (Resolved, Closed) and duedate >= -7d and duedate<=0d) or (status not in (Resolved, Closed) and duedate <=1w)		Delete
Next week	(status in (Resolved, Closed) and duedate >= 0d and duedate<=7d) or (status not in (Resolved, Closed) and duedate <=2w)		Delete
Future tasks	(status in (Resolved, Closed) and duedate > 7d) or (status not in (Resolved, Closed) and duedate > 2w)		Delete
Overdue	(status in (Open, "In Progress", Reopened) and duedate <=-1d) or (status = Resolved and duedate < -7d)		Delete
No Due Date	duedate is empty and status != Closed		Delete
Expedite	priority = Blocker	All issues with priority set to 'Blocker'	Delete
Everything Else			

HOW TO CREATE TRACKING BOARD – QUICK FILTERS

Quick Filters allow you (or anyone else using this board) to further filter the collection of issues appearing in Work mode or Plan mode.

Add a new Quick Filter:

In the blue area, type the 'Name', 'JQL', and optional a 'Description', then click the '**Add**' button. Your new Quick Filter will be added in the top Quick Filter position.

Name	JQL	Description	
			Add
Trainings	component=Training AND fixVersion in (ITS-DSES,"IT Services",ITS-HD,ITS-IAS)		Delete
Dismissal IT ServicesTasks	assignee=Tatsiana_Tychina AND component=Dismissal OR assignee=Julieta_Voskanyan AND component=Dismissal		Delete
IT Services	fixVersion in (ITS-DSES,"IT Services",ITS-HD,ITS-IAS)		Delete