



# 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

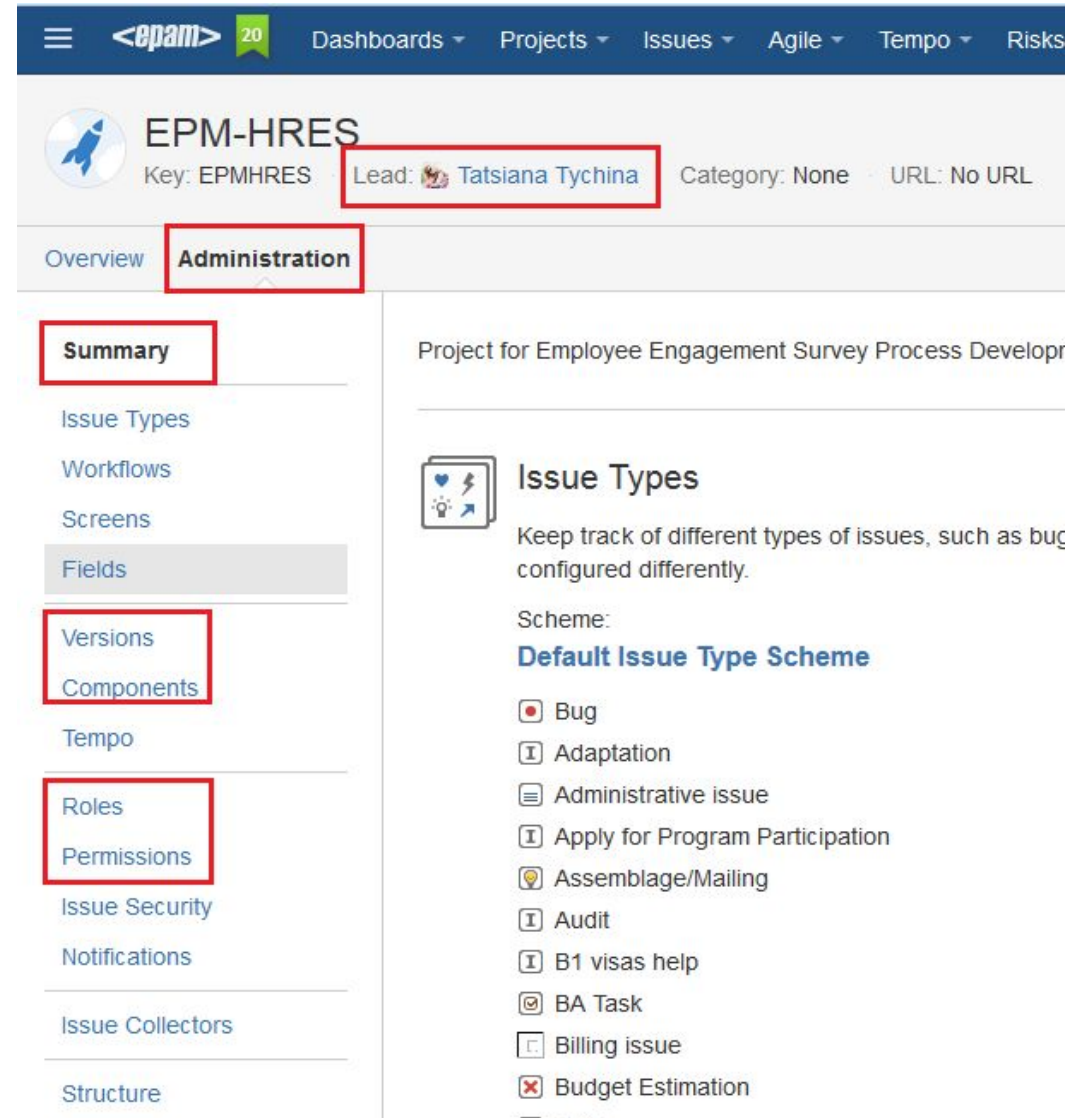


# HOW TO ADMINISTER YOUR JIRA PROJECT

Select **Projects** → your Project → **Administration** tab

5 main fields to configure:

- Summary
- Versions
- Components
- Roles
- Permissions



The screenshot shows the Jira Administration page for the project 'EPM-HRES'. The navigation bar at the top includes 'Dashboards', 'Projects', 'Issues', 'Agile', 'Tempo', and 'Risks'. The project details section shows 'Key: EPMHRES', 'Lead: Tatsiana Tychina', 'Category: None', and 'URL: No URL'. The 'Administration' tab is selected, and the left sidebar contains a list of configuration options: Summary, Issue Types, Workflows, Screens, Fields, Versions, Components, Tempo, Roles, Permissions, Issue Security, Notifications, Issue Collectors, and Structure. The 'Issue Types' section is expanded, showing a list of issue types under the 'Default Issue Type Scheme'.

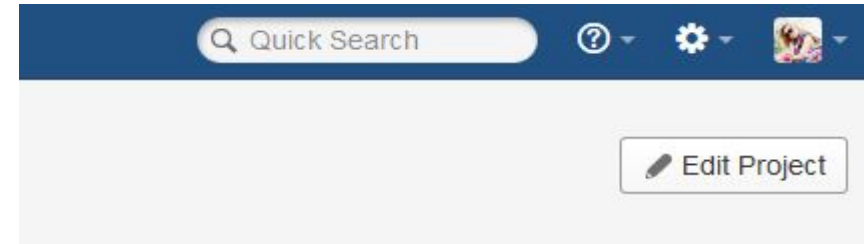
| Issue Type                      | Icon |
|---------------------------------|------|
| Bug                             |      |
| Adaptation                      |      |
| Administrative issue            |      |
| Apply for Program Participation |      |
| Assemblage/Mailing              |      |
| Audit                           |      |
| B1 visas help                   |      |
| BA Task                         |      |
| Billing issue                   |      |
| Budget Estimation               |      |



# HOW TO ADMINISTER YOUR JIRA PROJECT - SUMMARY

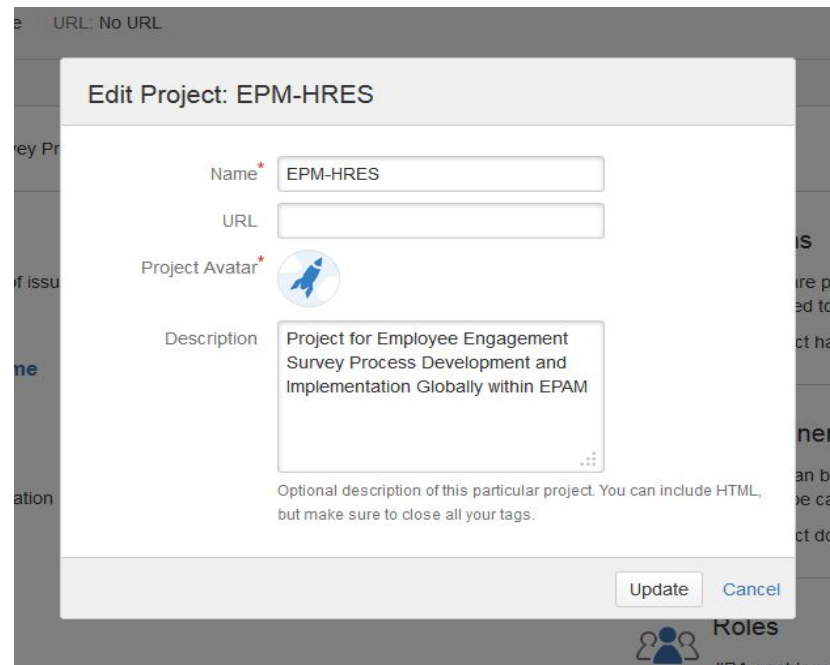
**Summary** – short project description

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.

The screenshot shows the JIRA administration interface for a project. On the left is a sidebar menu with options: Summary, Issue Types, Workflows, Screens, Fields, Versions (highlighted), Components, and Tempo. The main content area is titled 'Versions' with a box icon. Below the title is a descriptive paragraph: 'For software projects, JIRA allows you to track different versions, e.g. 1.0, 2.0. Issues can be assigned to a version.' Below this is a form with two input fields: 'Name' and 'Description'. The 'Name' field contains a small box icon. Below the form is a message: 'There are currently no versions for this project, you can add versions by using the fields above.'

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.

The screenshot shows the 'Components' administration page in Jira. On the left is a navigation menu with options: Summary, Issue Types, Workflows, Screens, Fields (highlighted), Versions, Components, and Tempo. The main content area is titled 'Components' and includes a sub-header with a diamond icon. Below the header is a descriptive sentence: 'Projects can be broken down into components, e.g. "Database", "User Interface". Issues can then be categorised against different components.' A table with four columns is shown: 'Name', 'Description', 'Component Lead', and 'Default Assignee'. The 'Name' column contains a small icon and an empty text input field. The 'Description' column contains an empty text input field. The 'Component Lead' column contains an empty text input field. The 'Default Assignee' column contains a dropdown menu with 'Project Default (Project Lead)' selected and a small downward arrow icon. To the right of the table is an 'Add' button. Below the table, a message states: 'There are currently no components for this project.'

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



## HOW TO ADMINISTER YOUR JIRA PROJECT – COMPONENTS

Link to the list of possible components:

<https://kb.epam.com/display/EPMHRM/JIRA+Component>

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

The screenshot shows the Jira Issues page. On the left, the 'FILTERS' sidebar is visible, with a red box highlighting the 'New filter' button. Below it are options for 'Find filters', 'My Open Issues', 'Reported by Me', 'Recently Viewed', and 'All Issues'. At the bottom of the sidebar is the 'FAVORITE FILTERS' section. The main content area has a search bar with a 'Save as' button. Below the search bar, a red box highlights the filter configuration options: 'Project: All', 'Type: All', 'Status: All', 'Assignee: All', 'Contains text', and a 'More' dropdown menu. The main content area also shows a table of issues with columns for 'T', 'Key', 'Summary', 'Assignee', 'Reporter', and 'P'. The table contains three rows of issue data.

| T | Key          | Summary   | Assignee        | Reporter       | P |
|---|--------------|---|-----------------|----------------|---|
|   | RQCCSPDM-210 | Change "Considered" to "Proposed"                   | Dmitri Miliuts  | Dmitri Miliuts | ↑ |
|   | RQCCSPDM-208 | Add url route for prod and move all links to config | Dmitri Miliuts  | Dmitri Miliuts | ↑ |
|   | RQCCSPDM-202 | Replace images for breadcrumb scroll buttons        | Kiryi Verkhovin | Pavel Tsurko   | ↑ |



# 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**

The screenshot shows the Jira interface for a tracking board titled "Copy of IT Services Tracking Board 2". The filter expression is "project = EPM-HRMT AND fixVersion in ('IT Services', ITS-DSES, ITS-HD, ITS-IA)". A modal window is open over the filter, showing the owner "Tatsiana Tychina" and the permissions section. The permissions section indicates the filter is visible to "Project: EPM-HRMT" and has an "Edit permissions" button highlighted with a red box. The subscriptions section shows "This filter has no subscriptions." and a "New subscription" button. The tracking board table below the modal lists several issues with their keys and summaries.

| T | Key         | Summary  |
|---|-------------|--|
| 📌 | EPMHRMT-607 | IT services Adaptation Ella Astashonok             |
| 📌 | EPMHRMT-490 | IT Services Create issues for all HR BP activities |
| 📌 | EPMHRMT-139 | IT Services conduct heroes.epam.com review, 20...  |
| 📌 | EPMHRMT-696 | EPMHRMT-139 / Diplomas for awards                  |
| 📌 | EPMHRMT-293 | IT Services Create Logo for department, 12-2013    |



# 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

## Edit Current Filter ?

Name\* Copy of IT Services Tracking Board 2

Description

Favorite

Shares **Project:** EPM-HRMT

Add Shares  ▾ >  ▾ >  ▾ + Add

Share with all users with permission to browse the 'EPAM Agile Competency Center' project





## 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).

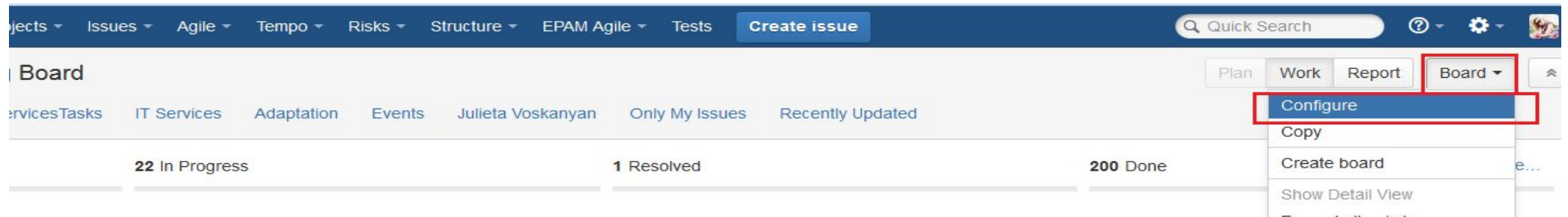
**For example:** *project = EPMHRMT AND fixVersion = "TASK- MUD" ORDER BY Rank ASC*



# 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)

The screenshot shows a Kanban board configuration interface with three columns: 'In Progress', 'Resolved', and 'Done'. Each column has a header, a subtitle 'Drag to rearrange, or delete', and two input fields for 'No Min' and 'No Max'. Below the columns, there are issue cards. The 'In Progress' column has a card with 'In Progress' and '22 issues'. The 'Done' column has a card with 'Closed' and '203 issues'. A new 'Resolved' column is being added below the existing one, with a card showing 'Resolved' and 'No issues'. The 'Resolved' column header and the new 'Resolved' card are highlighted with red boxes. A yellow horizontal line is drawn across the board.



# 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

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

| Name                                     | JQL  | Description                               |                                       |
|--|--|---|---------------------------------------|
| <input type="text"/>                     | <input checked="" type="checkbox"/>  | <input type="text"/>                      | <input type="button" value="Add"/>    |
| <input type="checkbox"/> This week       | (status in (Resolved, Closed) and due date >= -7d and due date <= 0d) or (status not in (Resolved, Closed) and due date <= 1w) |   | <input type="button" value="Delete"/> |
| <input type="checkbox"/> Next week       | (status in (Resolved, Closed) and due date >= 0d and due date <= 7d) or (status not in (Resolved, Closed) and due date <= 2w)  |   | <input type="button" value="Delete"/> |
| <input type="checkbox"/> Future tasks    | (status in (Resolved, Closed) and due date > 7d) or (status not in (Resolved, Closed) and due date > 2w)                       |   | <input type="button" value="Delete"/> |
| <input type="checkbox"/> Overdue         | (status in (Open, "In Progress", Reopened) and due date <= -1d) or (status = Resolved and due date < -7d)                      |   | <input type="button" value="Delete"/> |
| <input type="checkbox"/> No Due Date     | due date is empty and status != Closed   |   | <input type="button" value="Delete"/> |
| <input type="checkbox"/> Expedite        | priority = Blocker   | All issues with priority set to 'Blocker' | <input type="button" value="Delete"/> |
| <input type="checkbox"/> 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          |                                       |
|----------------------------|---|----------------------|---------------------------------------|
| <input type="text"/>       | <input type="text" value=""/>   | <input type="text"/> | <input type="button" value="Add"/>    |
| Trainings                  | component=Training AND fixVersion in (ITS-DSES,"IT Services",ITS-HD,ITS-IAS)                            |                      | <input type="button" value="Delete"/> |
| Dismissal IT ServicesTasks | assignee=Tatsiana_Tychina AND component=Dismissal OR assignee=Julieta_Voskanyan AND component=Dismissal |                      | <input type="button" value="Delete"/> |
| IT Services                | fixVersion in (ITS-DSES,"IT Services",ITS-HD,ITS-IAS)   |                      | <input type="button" value="Delete"/> |