

VALUE Tool Integration Manual

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Abstract

This document describes the process of integrating the VALUE tool with Atlassian's JIRA and Confluence. The instructions presented herein are meant to be used with VALUE tool version 1.5 or higher. To execute all steps below, it is required to have an administrator account on all applications, as well as access to the VALUE tool's application server.

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1 JIRA

1.1 Creating a User for the Application

To perform this action you will need to be signed in with a JIRA administrator user. In JIRA's administration site, open the **User management** tab and create a new user to be used by the VALUE tool.

1.2 Creating Custom Fields

Still in the JIRA's administration site, access the **Issues** tab and open the **Custom fields** screen. Create the three custom fields described in Table 1 below.

Field name	Description	Field type
Value Ranking	Provide the value ranking from the VALUE tool	Number Field
Value Summary	Provide the group assessment summary from the VALUE tool	Text Field (multi-line)
Value URL	URL of the issue on the VALUE tool	URL Field

Table 1: Custom fields

In the **Issues** tab, access the **Field configurations** and click on **configure**. Set the renderer of the **Value Summary** field to **Wiki Style Renderer**.

2 VALUE Tool

2.1 Connecting with JIRA's REST API

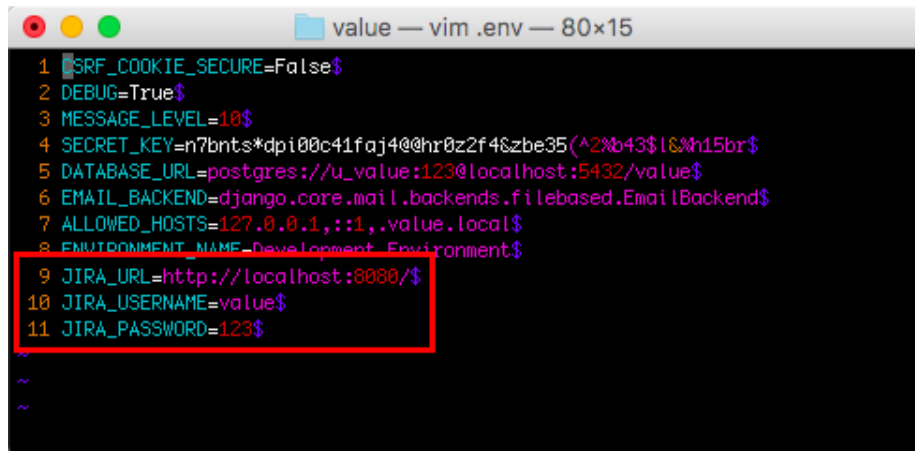
To perform this task you will need access to the application server where the VALUE tool is deployed.

Edit the `.env` file located in the project root (`/opt/value_tool/value/.env`). Add the following environment variables accordingly, as per Figure 1.

- `JIRA_URL`: base URL of the JIRA installation
- `JIRA_USERNAME`: username defined in Section 1.1
- `JIRA_PASSWORD`: password defined in Section 1.1

2.2 Mapping JIRA's Custom Fields

In the VALUE tool, open the **Application settings** screen and click on the **JIRA integration** menu. Check the **Enable JIRA integration** option and inform the IDs of the JIRA custom fields created in Section 1.2 (see Figure 2).



```
1 SRF_COOKIE_SECURE=False$
2 DEBUG=True$
3 MESSAGE_LEVEL=10$
4 SECRET_KEY=n7bnts*dp100c41faj4@hr0z2f4$zbe35(^2%b43$l&%h15br$
5 DATABASE_URL=postgres://u_value:123@localhost:5432/value$
6 EMAIL_BACKEND=django.core.mail.backends.filebased.EmailBackend$
7 ALLOWED_HOSTS=127.0.0.1,:1,.value.local$
8 ENVIRONMENT_NAME=Development Environment$
9 JIRA_URL=http://localhost:8080/$
10 JIRA_USERNAME=value$
11 JIRA_PASSWORD=123$
~
~
~
```

Figure 1: JIRA credentials

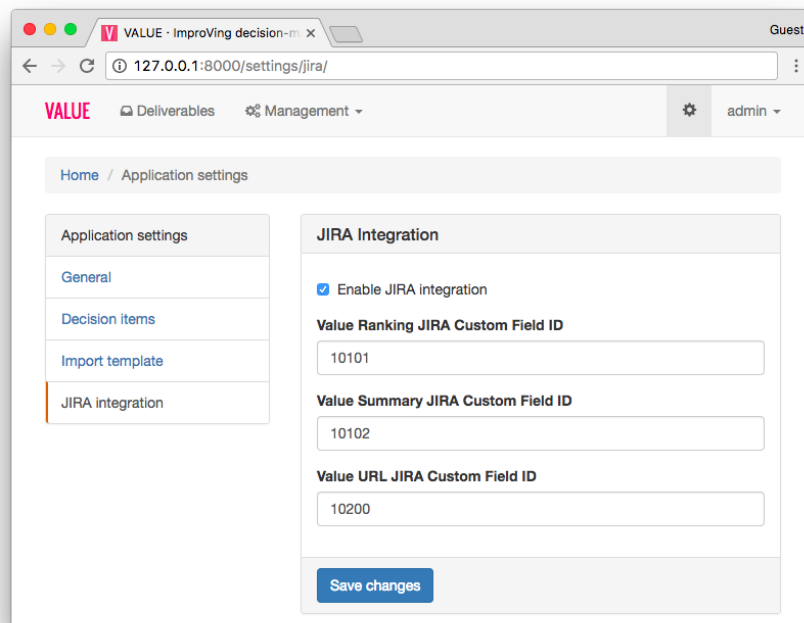


Figure 2: VALUE tool JIRA configuration

3 Confluence

To install the **User Macros** properly, download the templates in plain text using the link: <http://docs.valueproject.fi/integrations/confluence/#resources>

3.1 Creating User Macros

Inside the **Confluence administration**, access the **User Macros** screen to create the following macros described below.

3.1.1 Value Charts Macro

- **Macro Name:** value_charts
- **Macro Title:** Value Charts
- **Description:** Renders a chart from the VALUE tool's dashboard
- **Categories:** Development
- **Macro Body Processing:** No macro body

Template:

```
## Macro title: Value Charts
## Macro has a body: N
##
## Developed by: Vitor Freitas
## Date created: 05/05/2017
## Installed by: <INSTALLER_NAME>

## @param ChartType:title=Chart Type|type=enum|
enumValues=decision_items_overview,value_ranking,
factors_comparison|default=red|desc=Choose a chart type
## @param IssueId:title=Issue ID|type=string|
desc=JIRA Issue ID
## @param Width:title=Width|type=string|default=500|
desc=Width of the chart
## @param Height:title=Height|type=string|default=400|
desc=Height of the chart

<iframe style="border:0;padding:0;margin:0;"
width="$paramWidth" height="$paramHeight"
src="https://<VALUE_TOOL_DOMAIN>/api/charts/
?id=$paramIssueId&chartType=$paramChartType"></iframe>
```

Change the <INSTALLER_NAME> and <VALUE_TOOL_DOMAIN> markups with the correct values.

3.1.2 Value Summary Macro

- **Macro Name:** value_summary
- **Macro Title:** Value Summary
- **Description:** Display the evaluation summary from the VALUE tool
- **Categories:** Development
- **Macro Body Processing:** No macro body

Template:

```
## Macro title: Value Summary
## Macro has a body: N
##
## Developed by: Vitor Freitas
## Date created: 05/05/2017
## Installed by: <INSTALLER_NAME>

## This is an example macro
## @param IssueId:title=IssueId|type=string|
required=true|desc=JIRA Issue ID

<iframe style="border:0;padding:0;margin:0;" width="100%"
height="20" src="https://<VALUE_TOOL_DOMAIN>/api/summary/
?id=$paramIssueId"></iframe>
```

Change the <INSTALLER_NAME> and <VALUE_TOOL_DOMAIN> markups with the correct values.

Appendices

A JIRA Integration Screenshots

Import issues from JIRA directly into the VALUE tool

The screenshot shows a web browser window with the URL `127.0.0.1:8080/deliverables/6/decision-items/`. The browser tab is titled "VALUE - Improving decision-making". The page header includes the "VALUE" logo, "Deliverables", "Management", and a user profile "admin". The breadcrumb trail is "Home / Deliverables / TEST / Decision Items". The main heading is "TEST". Below it, there are tabs for "Meetings", "Stakeholders", "Decision Items", "Historical Dashboard", and "Settings". The "Decision Items" tab is active. Below the tabs, there are four buttons: "+ Add item", "Import from Excel", "Import from JIRA", and "Remove selected items". Below the buttons is a table with four columns: "Name", "Description", and "URL". The table contains three rows of data:

<input type="checkbox"/>	Name	Description	URL
<input type="checkbox"/>	TEST-6	What's next?	http://localhost:8080/browse/TEST-6
<input type="checkbox"/>	TEST-5	Keyboard shortcuts	http://localhost:8080/browse/TEST-5
<input type="checkbox"/>	TEST-4	Searching for information	http://localhost:8080/browse/TEST-4

Select the issues to import

VALUE - ImproVing decision-m X Guest

127.0.0.1:8000/deliverables/6/decision-items/jira-import/SDP/

VALUE Deliverables Management admin

Meetings Stakeholders Decision Items Historical Dashboard Settings

Sample Data Project / Issues

Select the issues to import

<input type="checkbox"/>	Key	Summary	URL
<input type="checkbox"/>	SDP-6	What's next?	http://localhost:8080/browse/SDP-6
<input type="checkbox"/>	SDP-5	Keyboard shortcuts	http://localhost:8080/browse/SDP-5
<input type="checkbox"/>	SDP-4	Searching for information	http://localhost:8080/browse/SDP-4
<input type="checkbox"/>	SDP-3	Editing tasks	http://localhost:8080/browse/SDP-3
<input type="checkbox"/>	SDP-2	Workflows and statuses	http://localhost:8080/browse/SDP-2
<input type="checkbox"/>	SDP-1	This is your first task	http://localhost:8080/browse/SDP-1

Import Selected Issues Cancel JIRA Import

Sync the data back to JIRA

VALUE - ImproVing decision-m X Guest

127.0.0.1:8000/deliverables/6/meetings/6/evaluate/

VALUE Deliverables Management admin

Home / Deliverables / TEST / Meetings / Pilot meeting / Evaluate

TEST / Pilot meeting

100.0% May 5, 2017, 5:47 a.m. Meeting notes Sync JIRA Analysing

Evaluate Dashboard Final Decision Settings

Search + - View Save changes

TEST-1	50.00%	12.50%	37.50%
Value Factor	Positive	Neutral	Negative
Customer: Customer Retention	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer: Customer Satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Technical: Development Effort	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical: Solution's Complexity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial: ROI	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Financial: Revenue Growth	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Internal Business: Continuous Improvement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Visualize the value of the issues/features in JIRA

Open issues

Order by Priority

TEST-2 Workflows and statuses

TEST-6 What's next?

TEST-5 Keyboard shortcuts

TEST-4 Searching for information

TEST-3 Editing tasks

TEST-1 This is your first task

+ Create issue

Test / TEST-2 Workflows and statuses

1 of 6

Edit Comment Assign More Start Progress Done Admin

Details

Type: Task Status: TO DO (View Workflow) Priority: Medium Resolution: Unresolved Labels: demo keyboard-shortcuts

Field Tab VALUE Tool

Value URL: http://127.0.0.1:8000/deliverables/6meetings/6dashboards/factors/35/7stakeholder=1&stakeholder=2&stakeholder=3&stakeholder=4&chart_type=stacked_bars

Value Summary: ~

Value Ranking: 9.375

Description

Workflows - What you need to know

Workflows define steps to get a task to done. To see the workflow this tasks goes through, click on View Workflow

People

Assignee: Vitor Freitas Reporter: Vitor Freitas Votes: Stop watching this issue Watchers: Stop watching this issue

Dates

Due: 10/May/17 Created: 15 hours ago Updated: 14 hours ago Deadline: 18/May/17

Time Tracking

Estimated: 1d 2h Remaining: 1d 2h

Display the value data in Confluence pages

Test page 2 - Value Project

Pages / Value Project

Edit Save for later Watching

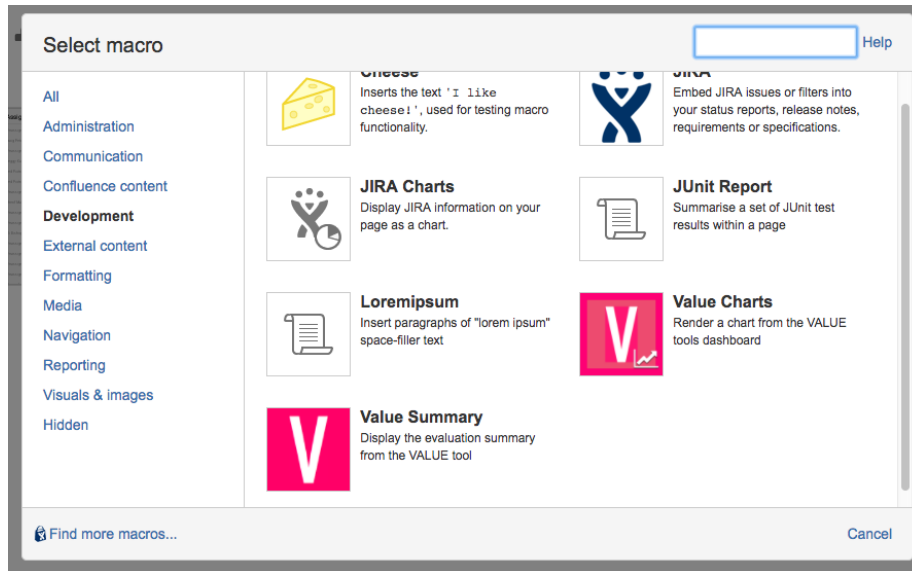
Test page 2

Created by Vitor Freitas, last modified less than a minute ago

Key	Summary	T	Due	Assignee	P	Value Ranking	Value Summary
TEST-6	What's next?	✓		Vitor Freitas	↑	-3.125	
TEST-5	Keyboard shortcuts	✓		Vitor Freitas	↑	-15.625	
TEST-4	Searching for information	✓		Vitor Freitas	↑	9.375	
TEST-3	Editing tasks	✓		Vitor Freitas	↑	-9.375	
TEST-2	Workflows and statuses	✓	May 10, 2017	Vitor Freitas	↑	9.375	
TEST-1	This is your first task	✓		Vitor Freitas	↑	15.625	

6 issues Refresh

Use custom user macros on Confluence



Use value charts embedded to Confluence pages

