

What will you learn here?



- Determine the right board type for your team
- Customize board configurations to meet business requirements
- Analyze agile reports and see the impact of scope and estimation changes
- Explore various board caveats and the tricks and troubleshooting tips



To succeed here, you should have



- Knowledge of agile principles, including Scrum and Kanban methodologies
- Practical experience in project administration
- Good understanding of project schemes
- Expertise in JQL



Agenda

Overview

Board Configuration

Agile Reports

Board Caveats



Overview

Visualizing work in Jira



“

Visualizing information can give us a very quick solution to problems. We can get clarity or the answer to a simple problem very quickly.

David McCandles, data-journalist, writer & information designer



Why visualize work?



Understand

- current state of the project
- focus the team(s) working on it



Why visualize work?



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Manage

- add and prioritize the work
- update individual work items



Why visualize work?



Understand

- current state of the project
- focus the team(s) working on it



Manage

- add and prioritize the work
- update individual work items



Improve

- spot problems and bottlenecks
- identify solutions & improvements



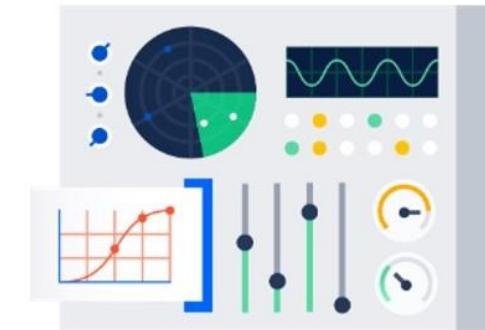
Visualizing work in Jira



Boards



Reports



Dashboards



Boards



- Visualize the process (columns, workflow mapping)
- Physical and digital boards
- Two-dimensional
- Display current status of each work item
- Displays issues as cards



Reports



- Display information and data analysis about the issues on the board
- Available reports depend on the board type



Dashboards



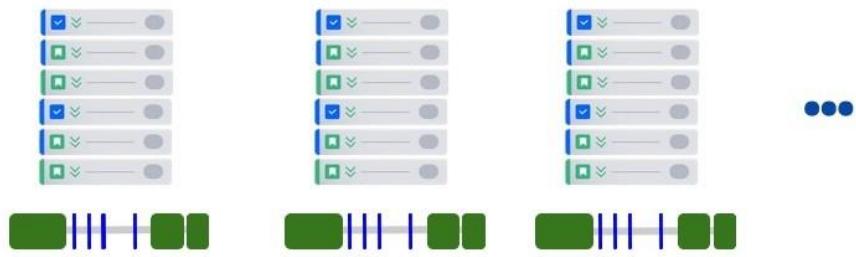
- Numerous gadgets that show issues from project(s) or saved filter(s)
- Several agile-related gadgets available – display data from the selected board



Board types



Board types



Scrum board

Default views of Backlog and Active Sprints
Versions Panel and Epic Panel in Backlog

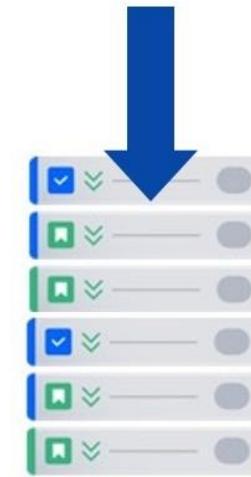


Board types



Scrum board

Default views of Backlog and Active Sprints
Versions Panel and Epic Panel in Backlog



Kanban

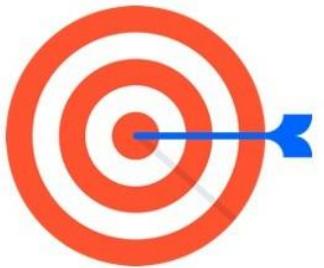
Kanban board only by default
Backlog may be enabled, with optional Epics Panel
No Versions Panel
Release from Done column



Scrum framework



Scrum framework

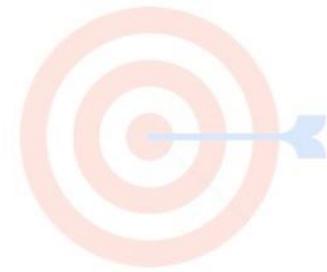


Artifacts

- Product backlog
- Sprint backlog
- Sprint goal
- Sprint boards
- Reports



Scrum framework



Artifacts

- Product backlog
- Sprint backlog
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- Sprint boards
- Reports

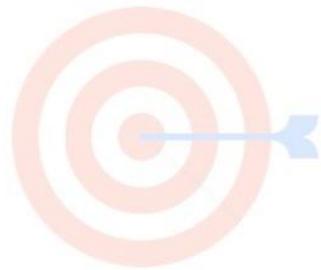


Roles

- Product owner
- Scrum master
- Development team members
- Stakeholders



Scrum framework



Artifacts

Product backlog
Sprint backlog
Sprint goal
Sprint boards
Reports



Roles

Product owner
Scrum master
Development team members
Stakeholders



Events

Sprint planning meeting
Daily standups
Sprint review
Sprint retrospective



Scrum

Product backlog

Sprint backlog

Sprint goal

Active Sprints

Reports

Product backlog

- Dynamic, ordered to-do list for the project
- Includes stories, features, improvements, bugs, etc.
- Issues at the top include more detail
- Managed and continually refined by the product owner



Product backlog



Modifying the product backlog is called product backlog refinement (or backlog grooming).



Scrum

Product backlog

Sprint backlog

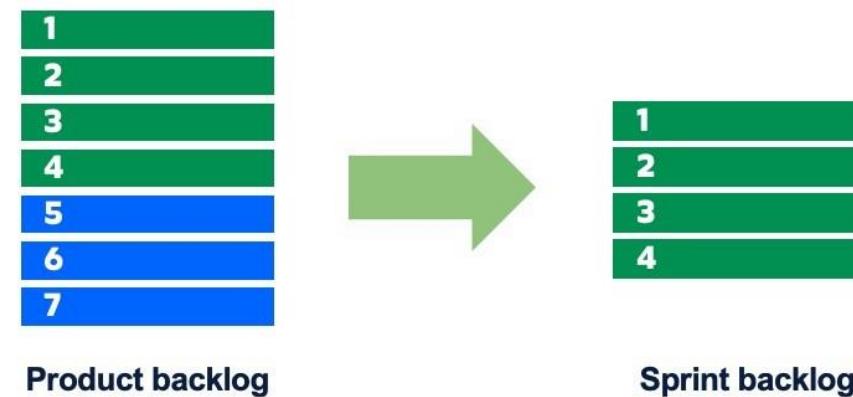
Sprint goal

Active Sprints

Reports

Sprint backlog

- A subset of the product backlog
- In current (active) sprint or the next one to get started
- Issues that are well-defined, broken down, estimated
- Assigned to and completed by the development team



i The total of all estimated issues is the team's sprint commitment.



Scrum

Product backlog

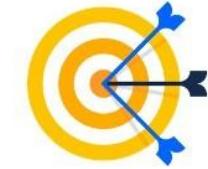
Sprint backlog

Sprint goal

Active Sprints

Reports

Sprint goal



- Represents the objective of the sprint's increment
- Is reached by completing the sprint backlog
- Does not change during the sprint; sprint is a success if the sprint goal is reached
- Provides a coherent product increment
- Enables flexibility with the sprint backlog



Scrum

Product backlog

Sprint backlog

Sprint goal

Active Sprints

Reports

Active Sprints

- Work through the sprint backlog
- Complete items by moving them across columns
- Identify impediments
- Conduct daily standup meetings

To Do	In Progress	Done
2	3	1
4		



Scrum

Product backlog

Sprint backlog

Sprint goal

Active Sprints

Reports

Reports

- Burndown Chart
- Burnup Chart
- Sprint Report
- Velocity Chart
- Version Report
- Epic Report
- Epic Burndown
- Release Burndown
- Cumulative Flow Diagram
- Control Chart



Kanban framework



Kanban framework



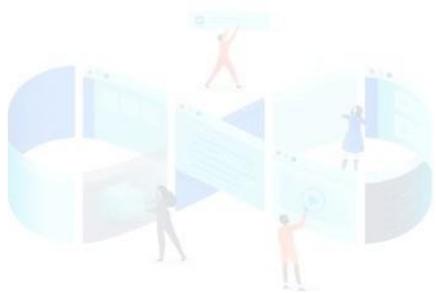
Continuous work

Continuously add & prioritize new work items. Continuously finish work.

Used by service, customer-support, help desk, operations teams.



Kanban framework



Continuous work

Continuously add & prioritize new work items. Continuously finish work.
Used by service, customer-support, help desk, operations teams.

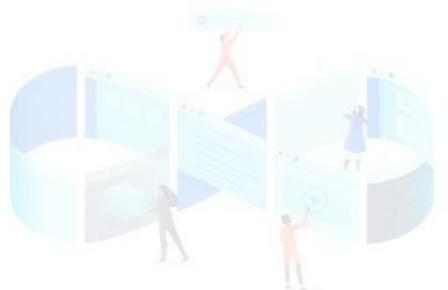


Improve flow

Limit work in progress and fix bottlenecks before starting new issues.



Kanban framework



Continuous work

Continuously add & prioritize new work items. Continuously finish work. Used by service, customer-support, help desk, operations teams.



Improve flow

Limit work in progress and fix bottlenecks before starting new issues.



Pull vs. push

Pull work from previous step when ready to do it. Push work to next column when done.



Kanban

Kanban board

Backlog

WIP limits

Reports

Kanban board

- Entire backlog is visible
- Tasks are pulled
- Work is completed one-by-one
- Issues are released from the Done column as needed



Kanban

Kanban board

Backlog

WIP limits

Reports

Kanban backlog

- Backlog must be enabled to use
- Provides separate and bigger space to create & prioritize issues before sending them for development
- Main Kanban board shows issues actively being worked on
- Can (optionally) enable the Epics Panel
Selected for Development



Kanban

Kanban board

Backlog

WIP limits

Reports

WIP limits

- Set minimum and/or maximum number of issues allowed in certain board columns
- Column color turns yellow or red if the number of issues exceeds the threshold
- WIP limits depend on the team's need:
 - ✓ none at first then add them if process has problems
 - ✓ discourage multitasking
 - ✓ minimums on steps the team neglects



Backlog and Done columns generally don't have limits.



Kanban

Kanban board

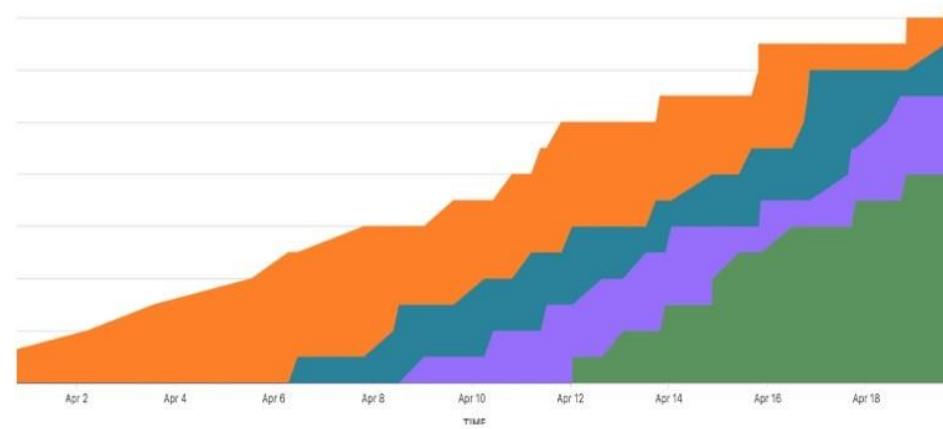
Backlog

WIP limits

Reports

Reports

- Cumulative Flow Diagram
- Control Chart



Board creation



Automatically

A board is created automatically when a new project is created using the Kanban or Scrum project template.



Board creation



Automatically

A board is created automatically when a new project is created using the Kanban or Scrum project template.

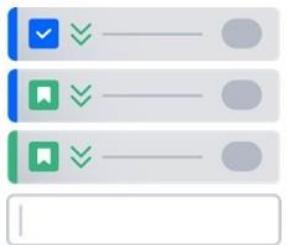


Manually

Create additional boards, of either board type, at any time, regardless of Software project template used.



Board configuration

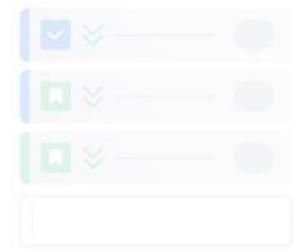


Board Filter

- All or subset of issues from one or more projects
- Kanban boards also have a sub-filter.



Board configuration



Board Filter

- All or subset of issues from one or more projects
- Kanban boards also have a sub-filter.



Features

- Swimlanes
- Quick filters
- Card layout, etc.



Board features

	Scrum board	Kanban board
Columns	✓	✓
Quick filters	✓	✓
Swimlanes	✓	✓
Card layout	✓	✓
Card colors	✓	✓



Board features

	Scrum board	Kanban board
Columns	✓	✓
Quick filters	✓	✓
Swimlanes	✓	✓
Card layout	✓	✓
Card colors	✓	✓
Estimation	✓	✗
Sprints	✓	✗



Board features

	Scrum board	Kanban board
Columns	✓	✓
Quick filters	✓	✓
Swimlanes	✓	✓
Card layout	✓	✓
Card colors	✓	✓
Estimation	✓	✗
Sprints	✓	✗
Release	✗	✓



Use Case



I need a board for my team that works in a continuous process. I want a separate place to plan and prioritize tickets before team members start work on them.

Choosing the board type

We need to decide which board type to use and how to configure it.



Walkthrough



Knowledge Check



Samantha needs to improve the continuous flow of work for her service team. She wants to constrain their work in progress and focus them on removing bottlenecks before they start work on new issues.

Which board feature will meet her needs?

- A. Backlog
- B. Card colors
- C. WIP limits
- D. Estimation



Knowledge Check



Samantha needs to improve the continuous flow of work for her service team. She wants to constrain their work in progress and focus them on removing bottlenecks before they start work on new issues.

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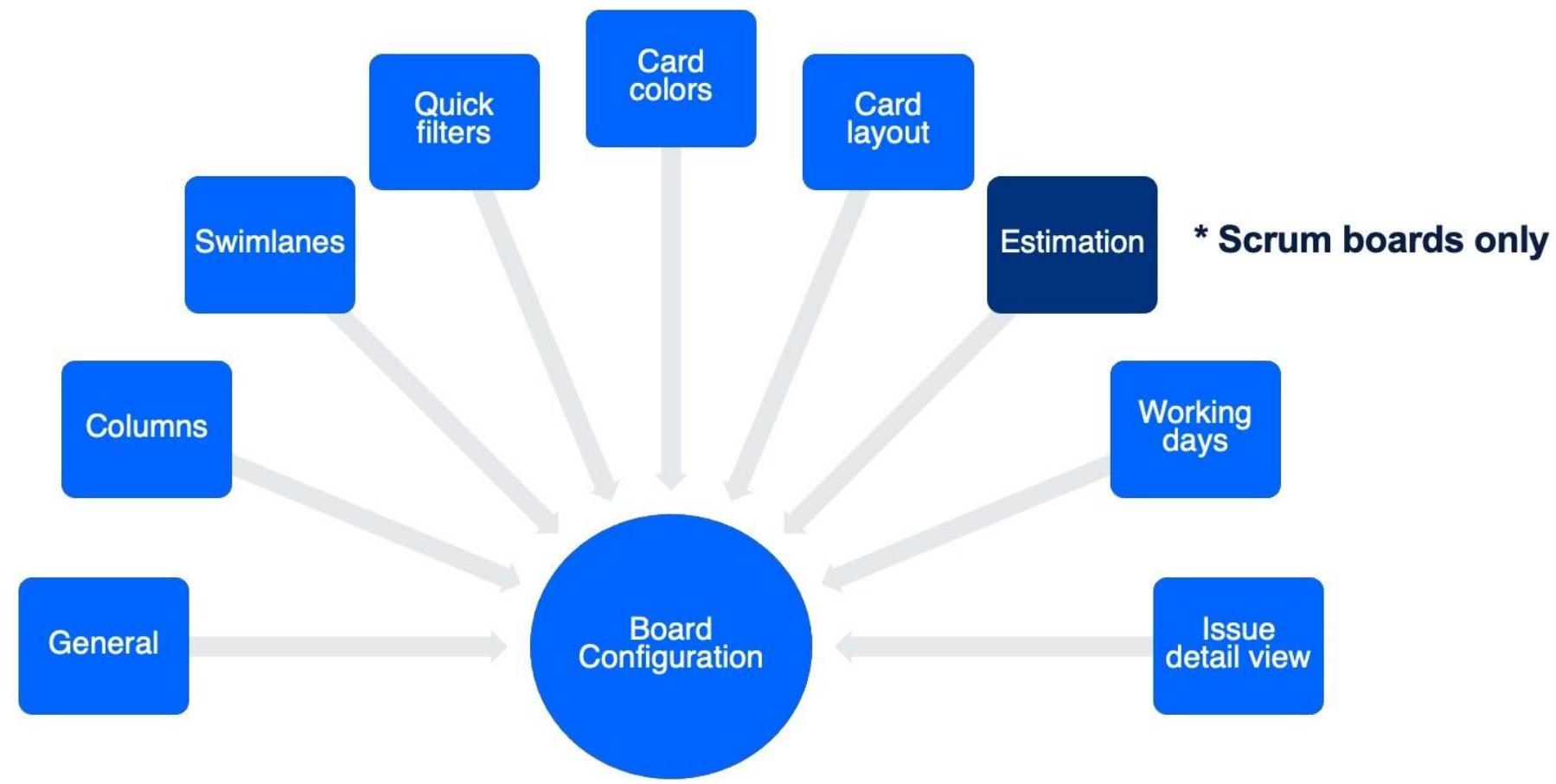


Board Configuration

Customizing boards to meet the needs
of your team



Board configuration options



General settings



General

- Board name
- Administrators



General settings



General

- Board name
- Administrators

Filter

- Saved Filter
- Shares
- Filter Query
- Ranking
- Projects in Board



General settings



General

- Board name
- Administrators

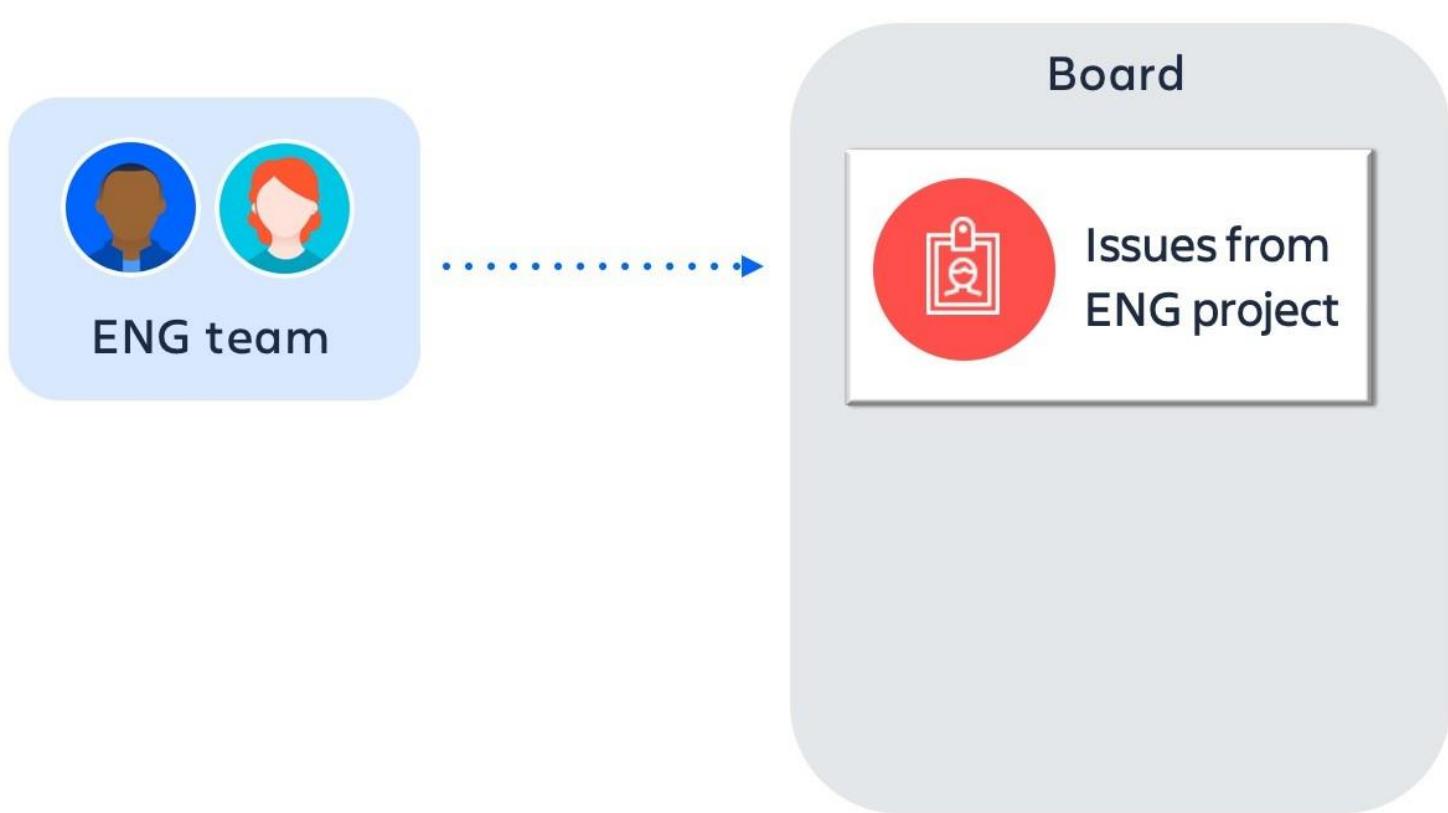
Filter

- Saved Filter
- Shares
- Filter Query
- Ranking
- Projects in Board
- Kanban board sub-filter
- Hide completed issues older than

Kanban
boards only



Board filter: 1 team & 1 project

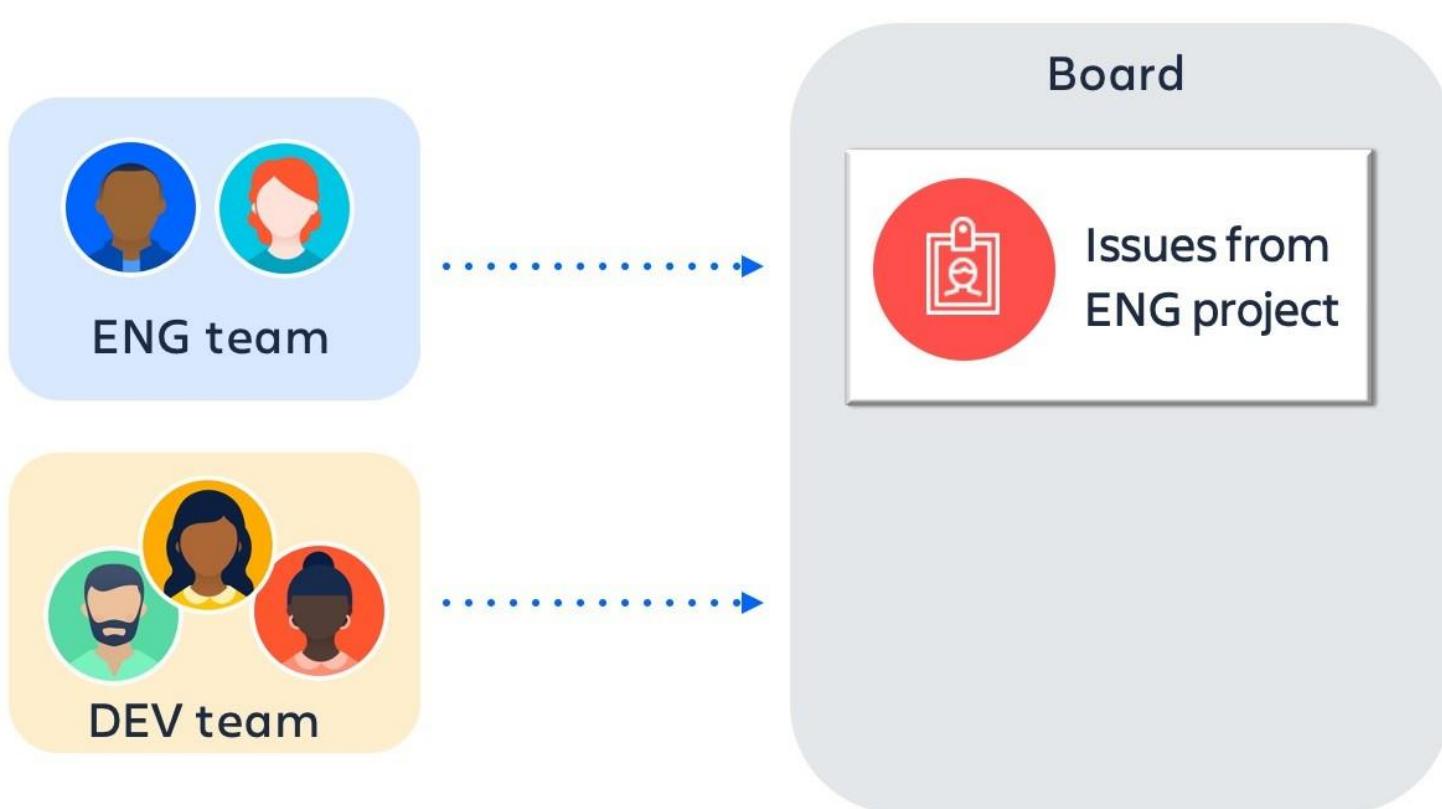


FILTER QUERY

`project = ENG ORDER BY Rank ASC`



Board filter: 2 teams & 1 project

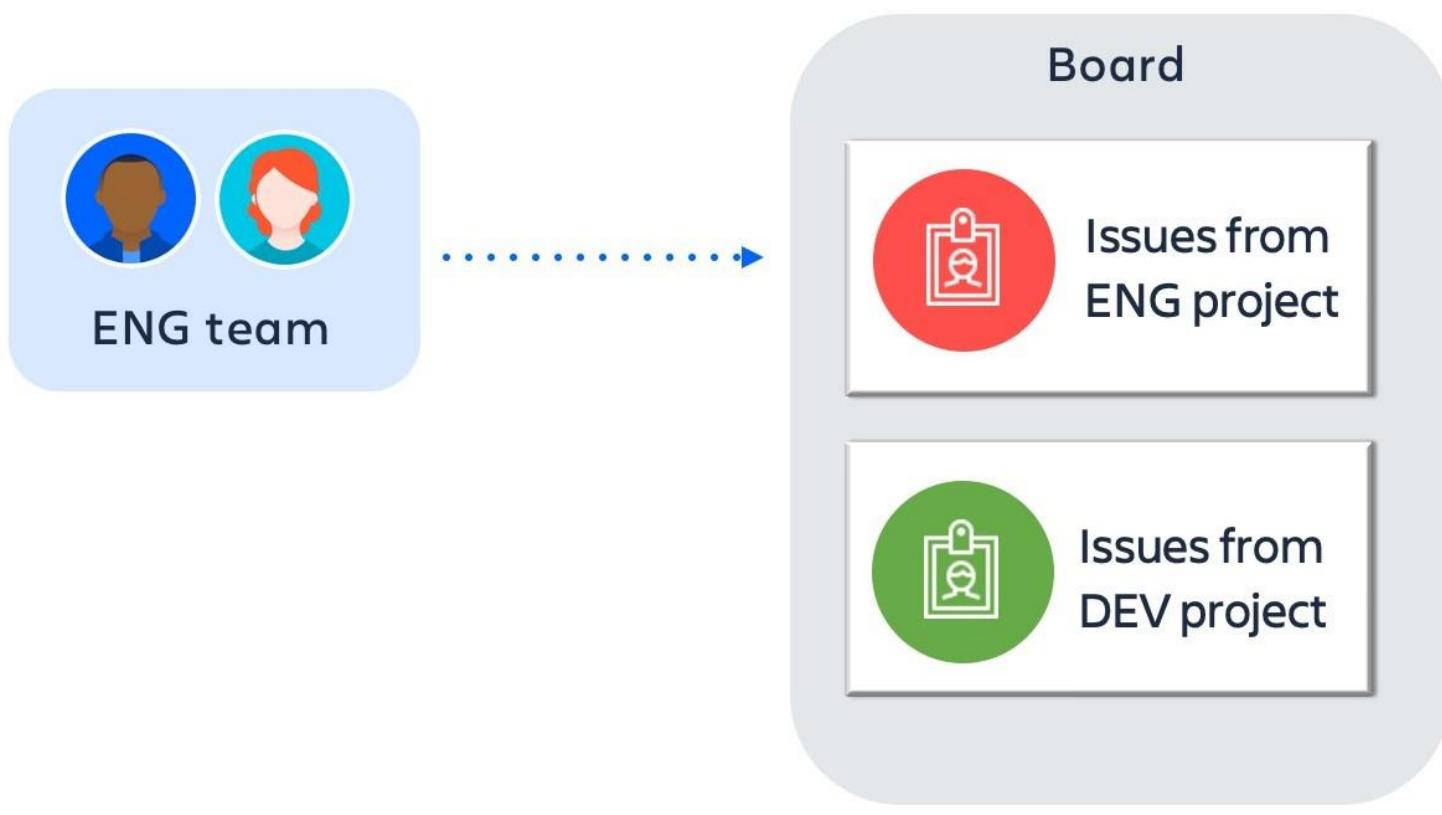


FILTER QUERY

`project = ENG AND Labels in (eng-team, dev-team) ORDER BY Rank ASC`



Board filter: 1 team & multiple projects

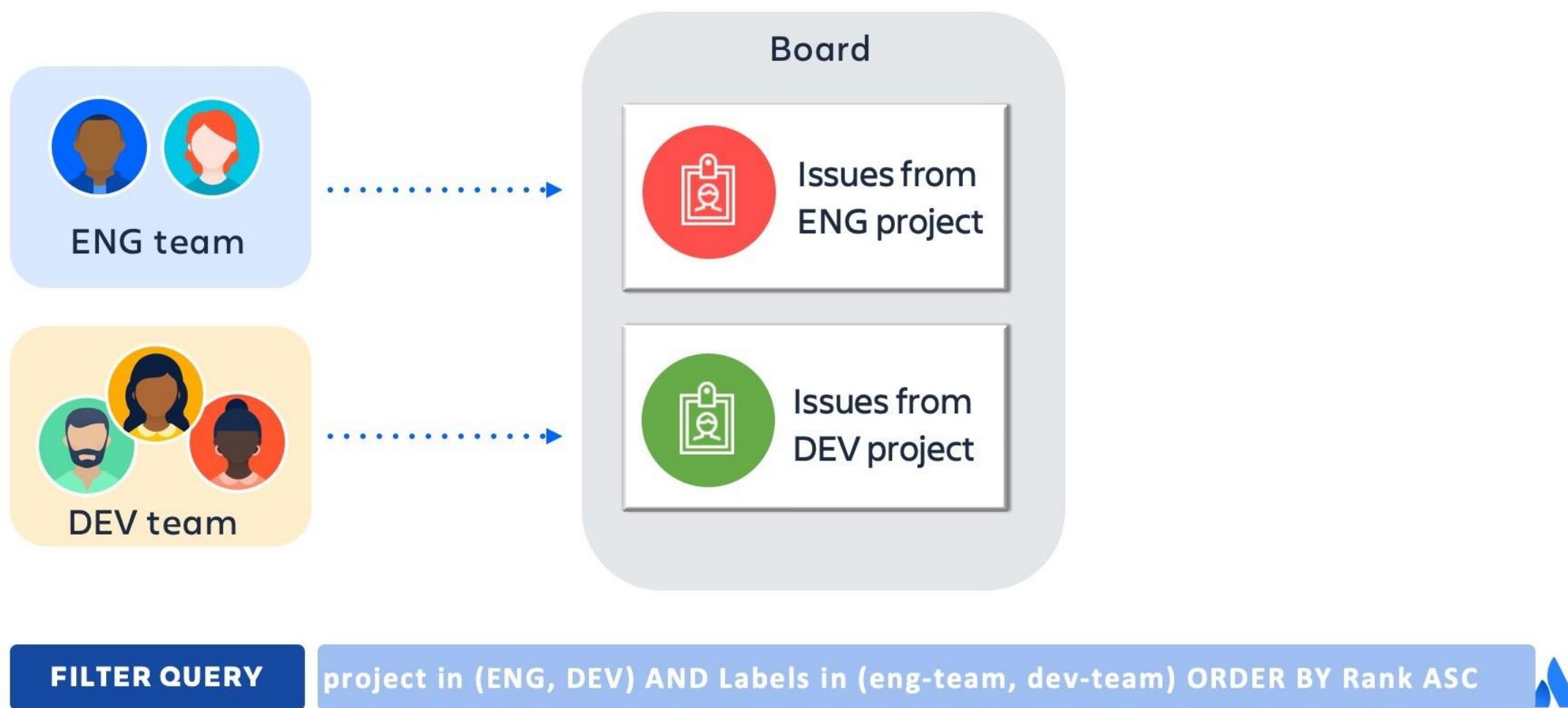


FILTER QUERY

`project in (ENG, DEV) ORDER BY Rank ASC`



Board filter: multiple teams & projects



Example: General

The screenshot shows the 'General' configuration page for a board named 'MULTI'. It includes sections for Board name, Administrators, Filter, Projects in board, and Kanban board sub-filter.

- Board name:** MULTI
- Administrators:** Admin Istrator (admin)
- Filter**
 - Saved Filter:** Filter for MULTI
 - Shares:** Project: AKAN (VIEW), Project: Teams in Space (VIEW)
 - Filter Query:** project in (AKAN, TIS) ORDER BY Rank ASC
 - Ranking:** Using Rank
- Projects in board:**
 - AKAN
 - Teams in Space
- Kanban board sub-filter:** fixVersion in unreleasedVersions() OR fixVersion is EMPTY
- Hide completed issues older than:** 2 weeks

1) Two projects in the board and the board is shared with both

2) Ranking is enabled

3) Default Kanban sub-filter query

4) Hide older issues



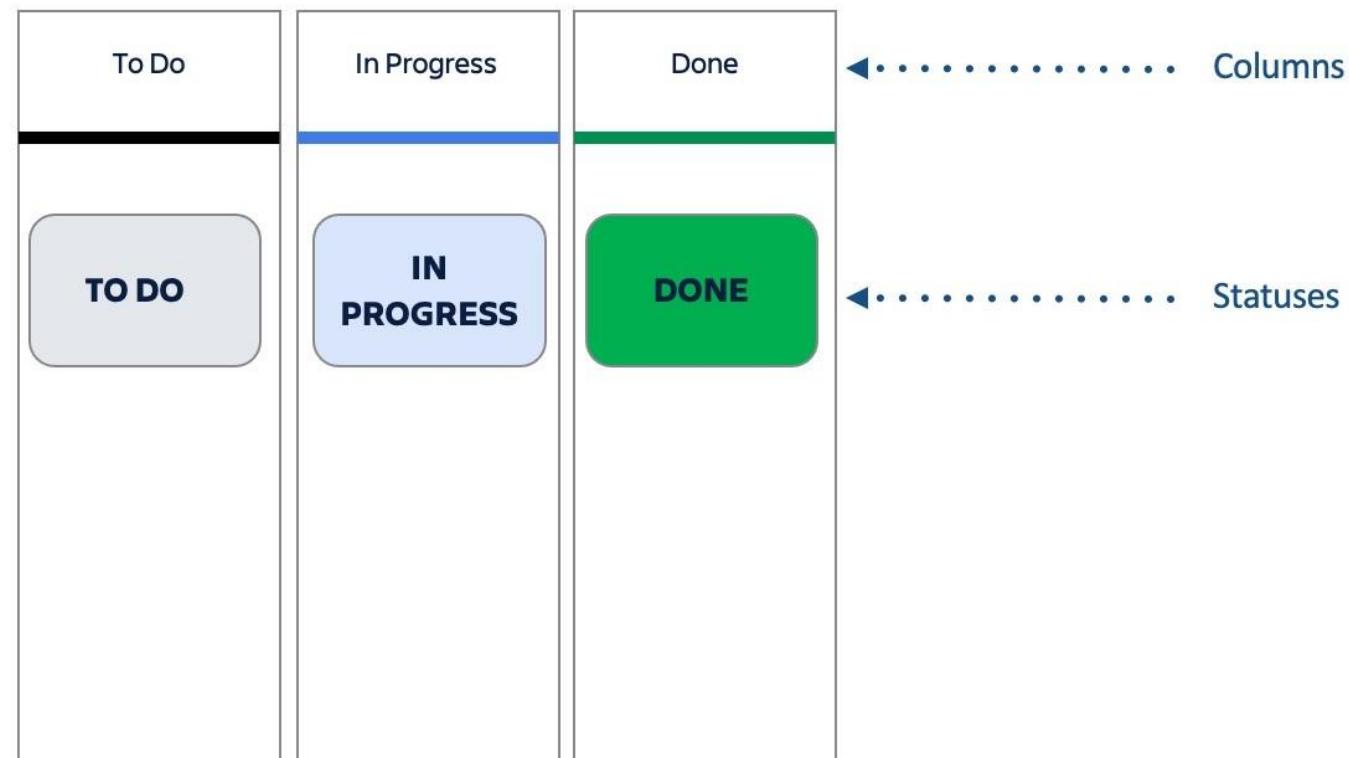
Columns settings



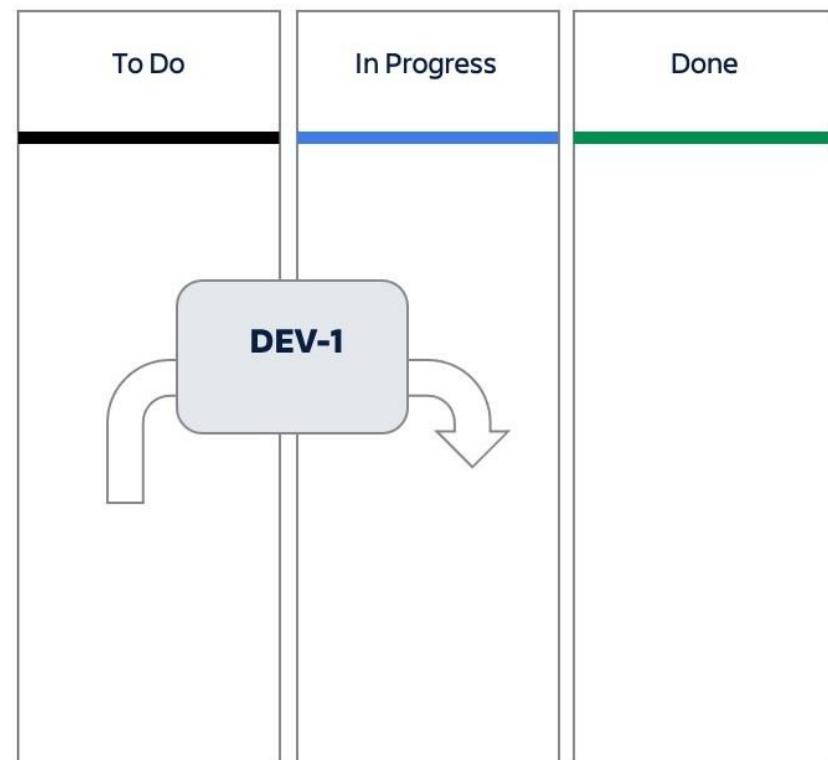
- Column constraint
- Days in column
- Simplified Workflow
- Column and Status mapping



Columns represent workflow status(es)



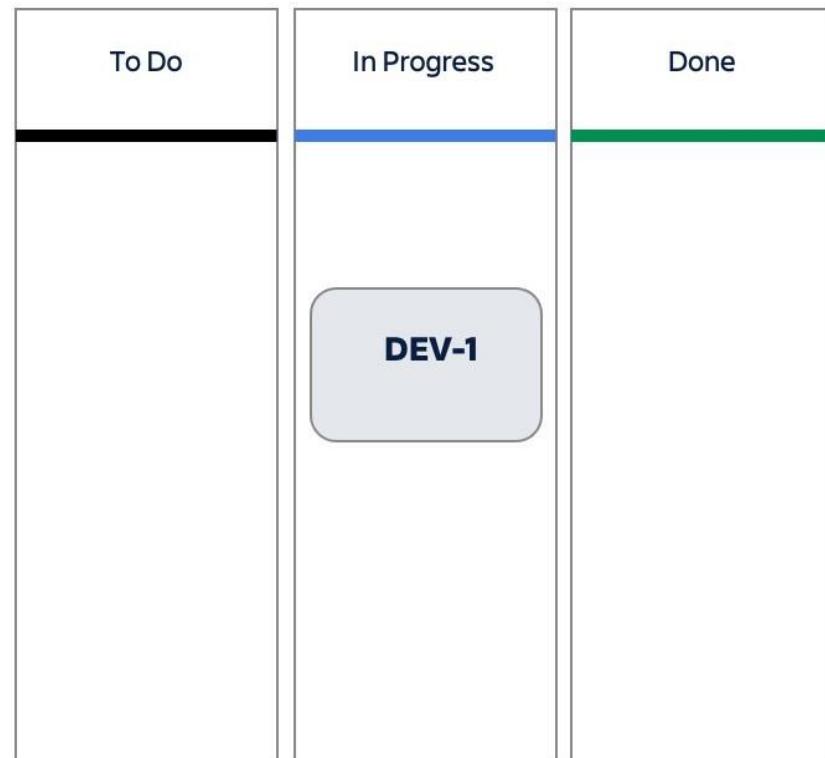
Dropping into a column = workflow transition



- Using drag-and-drop between columns transitions the issue



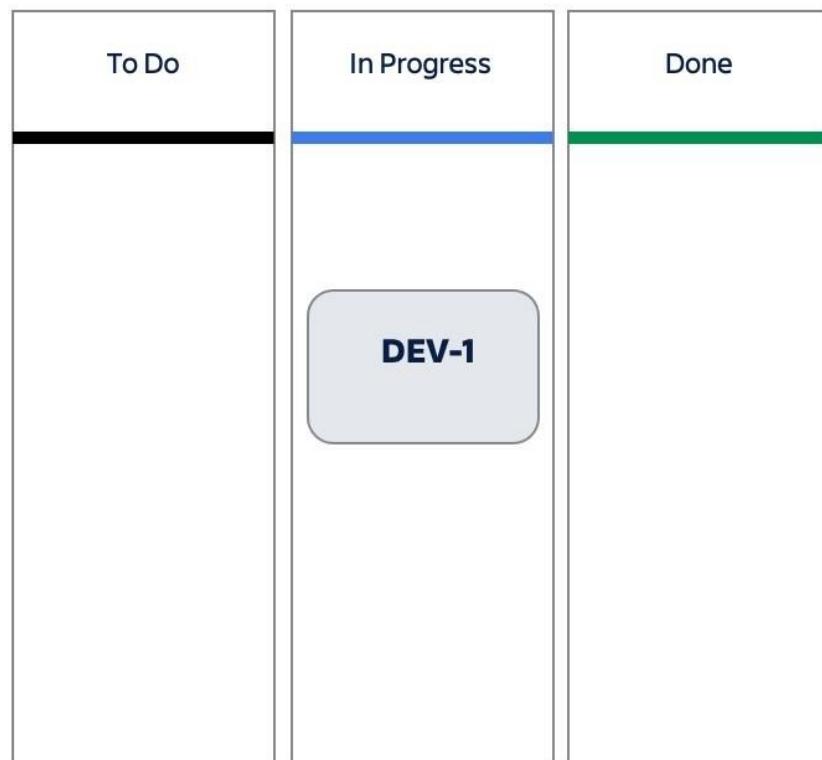
Transition outside of a board updates the board



- Transitioning from issue view (or bulk operations) updates the board(s) on which the issue is found



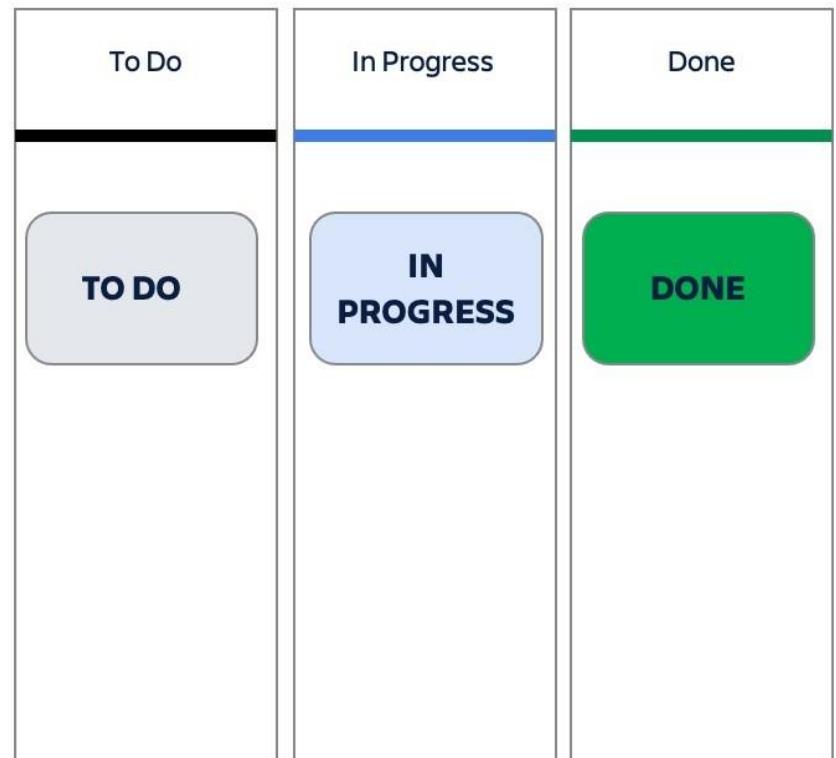
Issue status and column location are in sync



Issue status and issue location within a board column stay in sync.



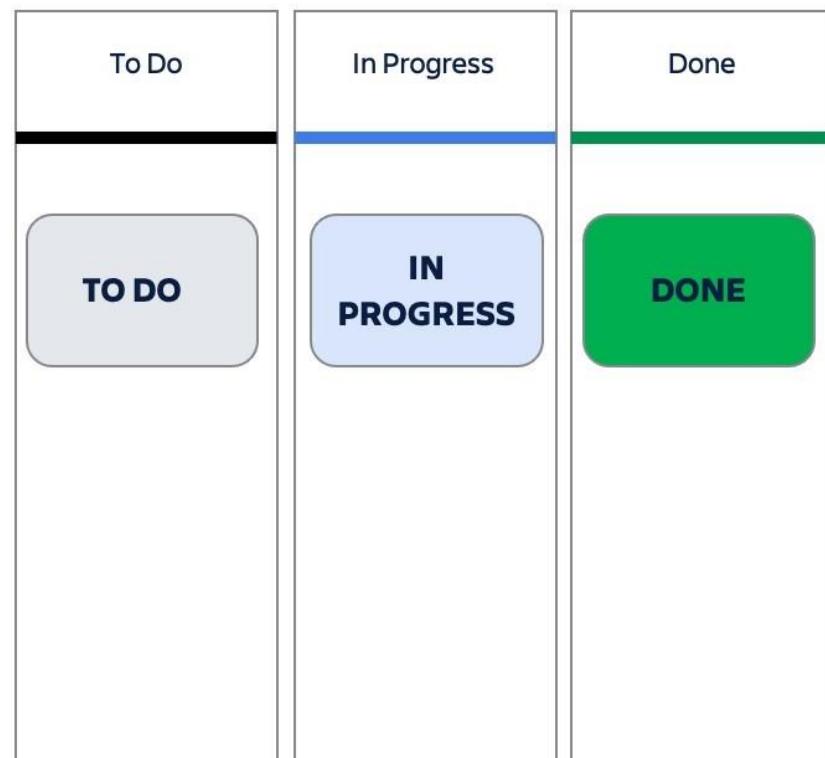
Default Configuration: Scrum board



Automatically configured during creation of a Scrum project and board.



Simplified Workflow



- Easy to use
- Managed by Jira Software
- Board represents single project
- Only global transitions
- No transition screens
- No conditions or validators



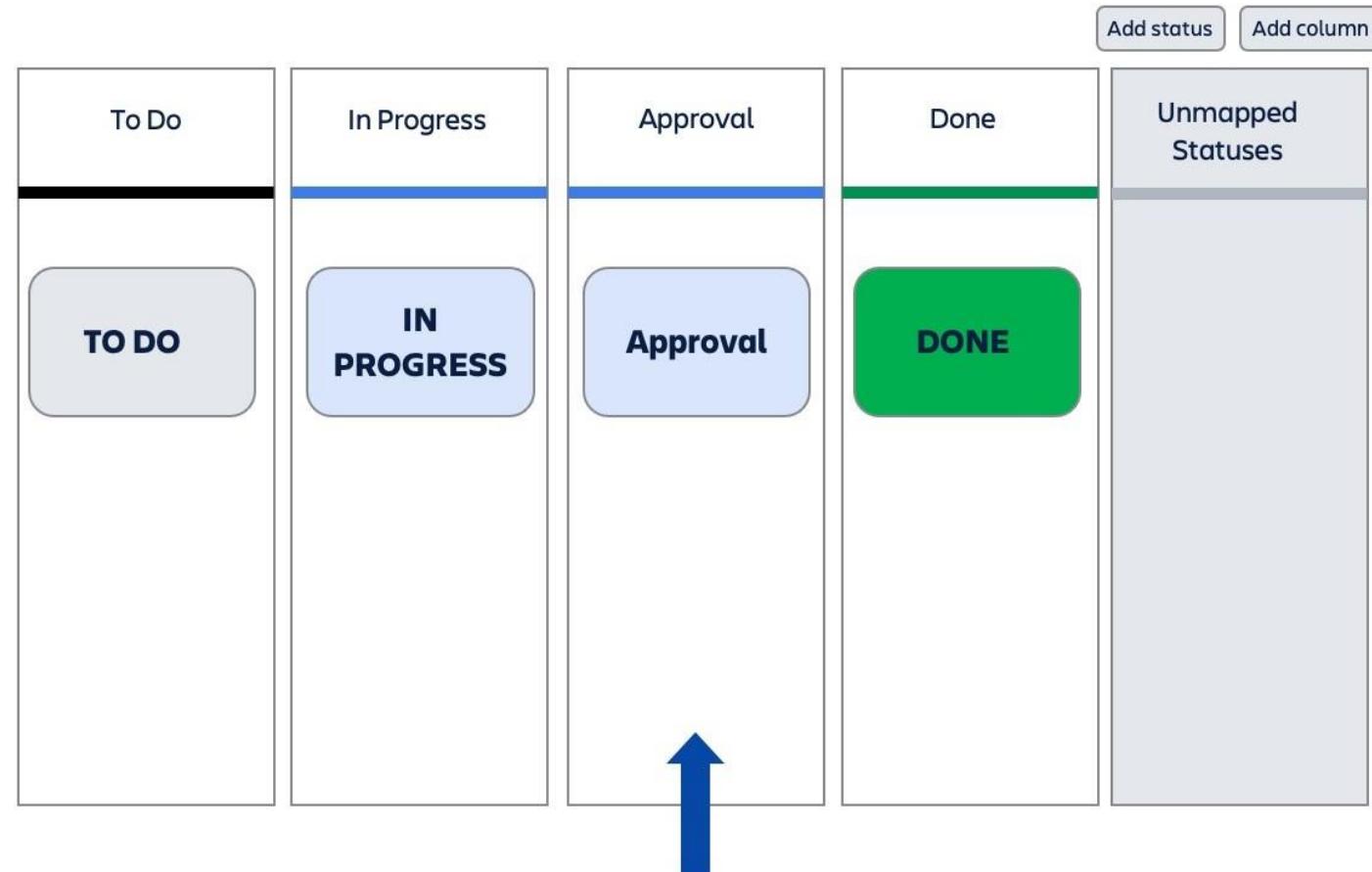
Simplified Workflow



- Status and columns can be added and removed by:
 - Jira administrators
 - Project Administrators (who are also board administrators)



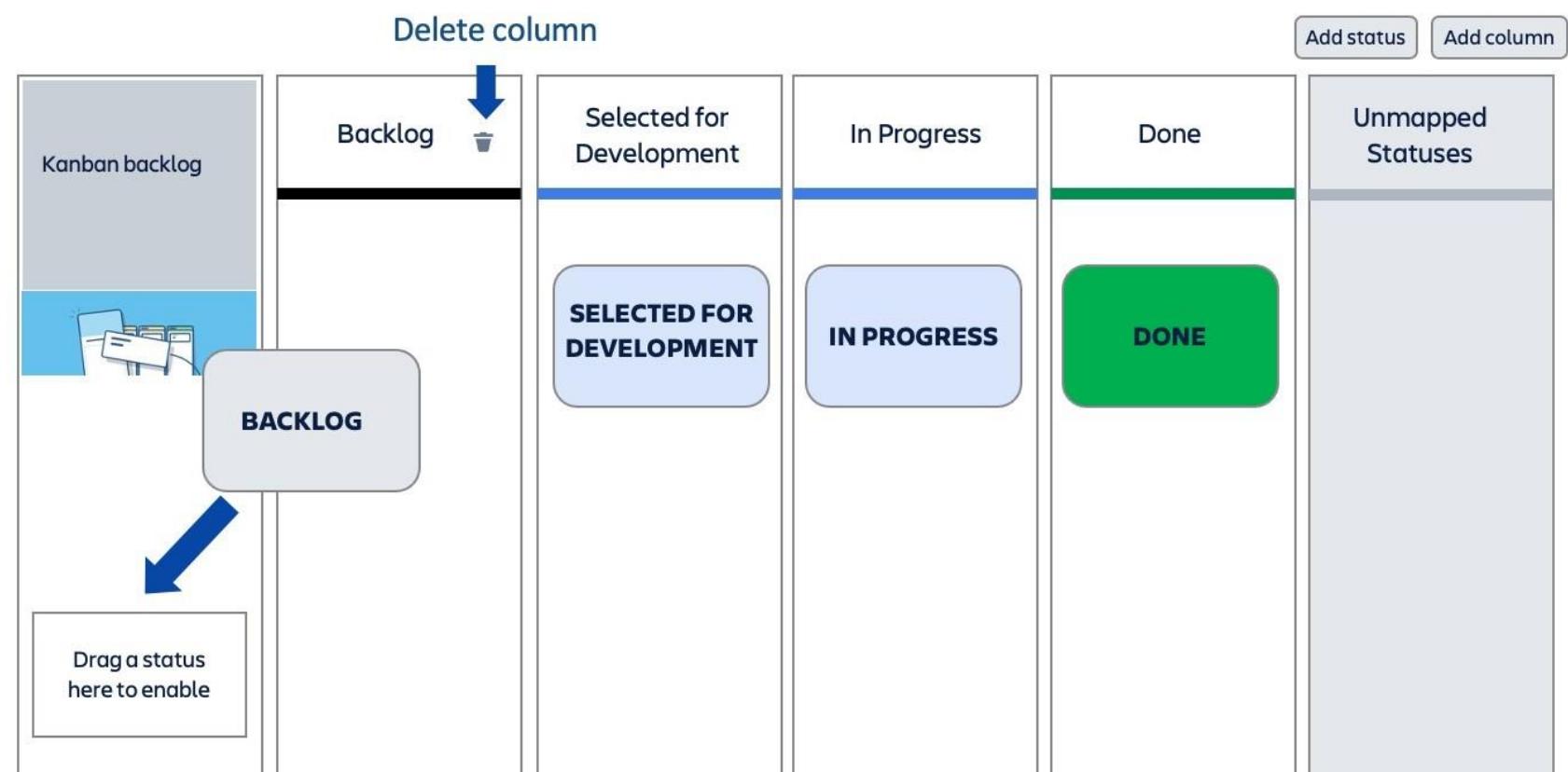
Simplified Workflow with new status



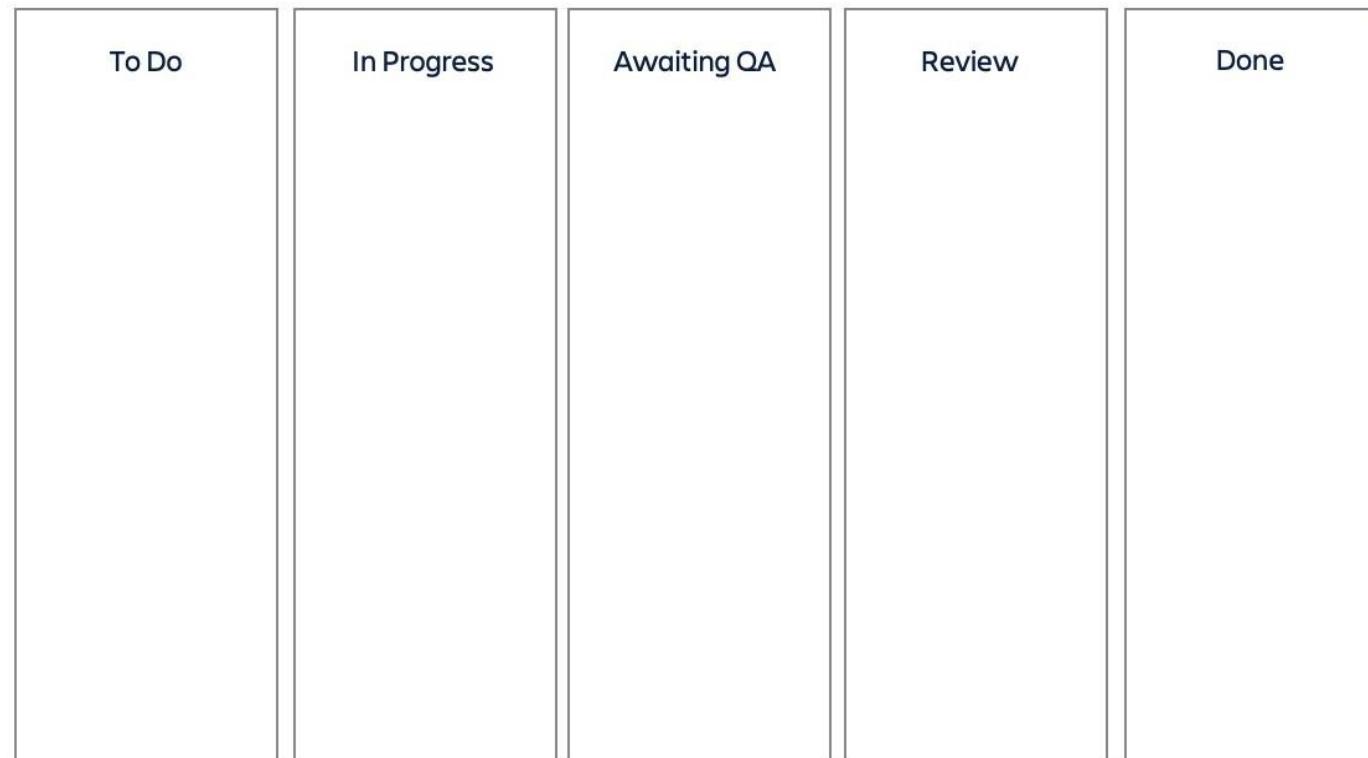
Default Configuration: Kanban board



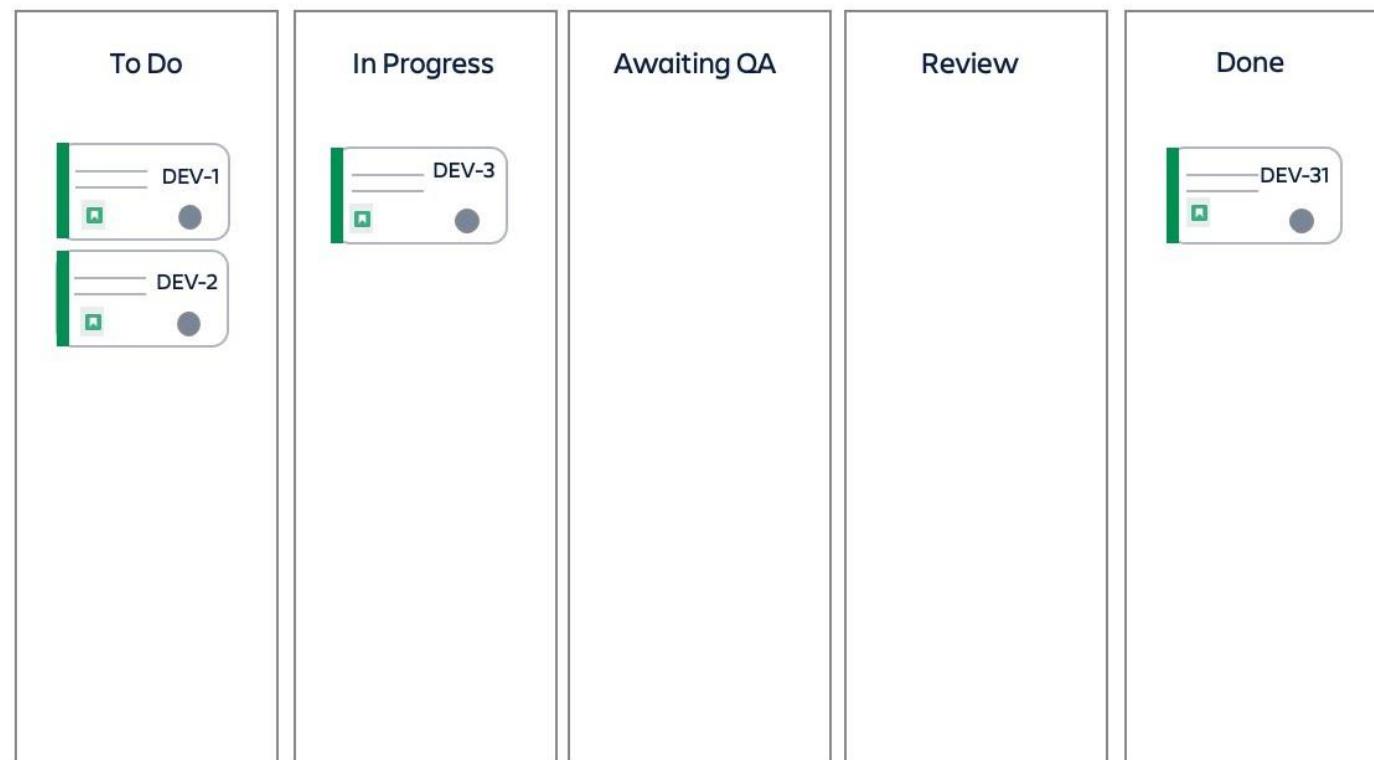
Enabling the Kanban Backlog



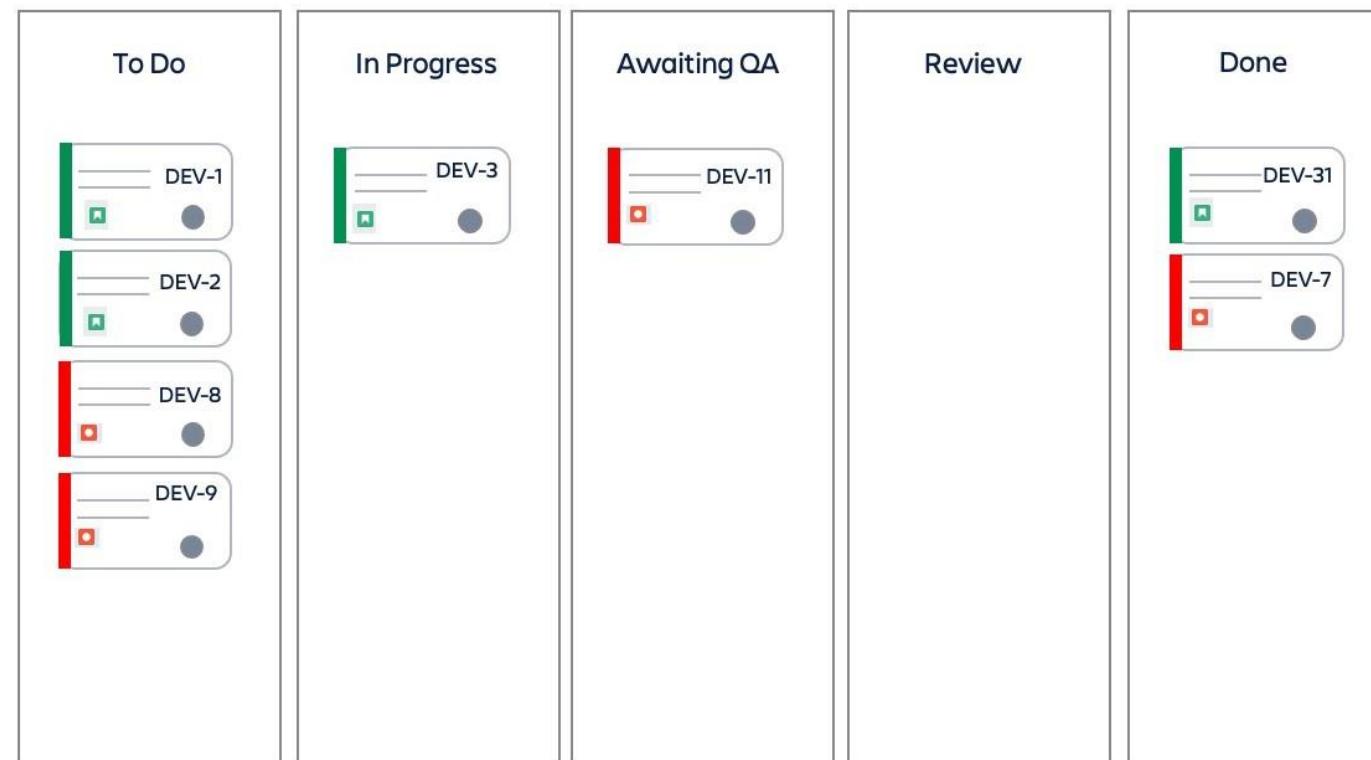
Complex board configurations



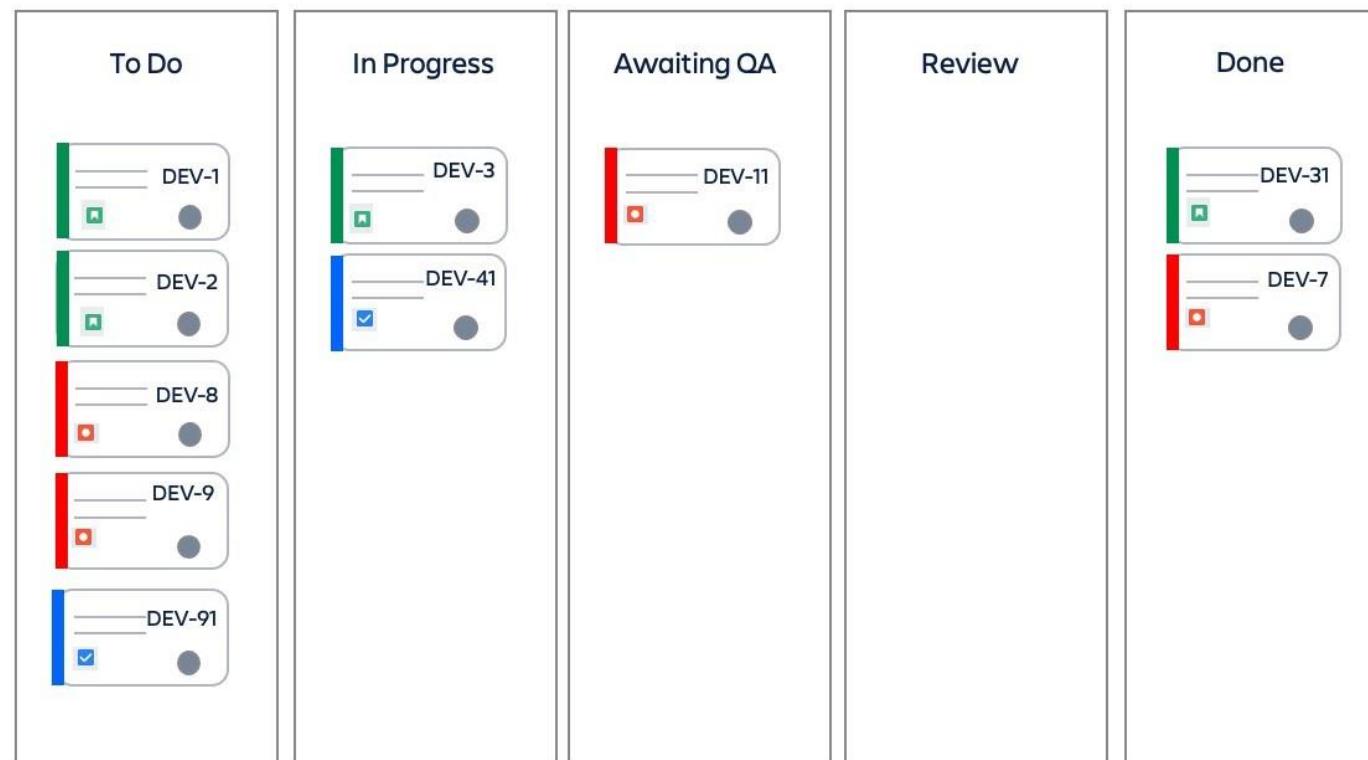
Example: 1 issue type, 1 project



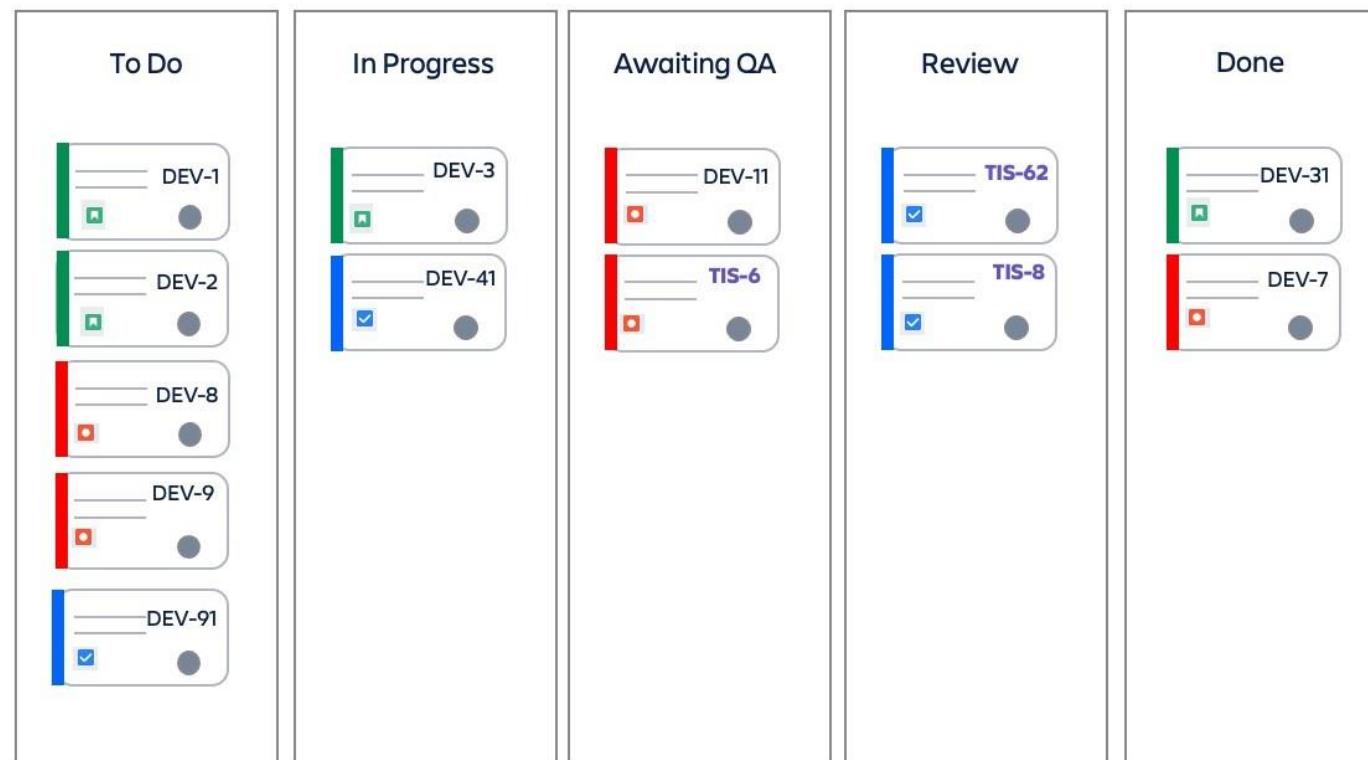
Example: 2 issue types, 1 project



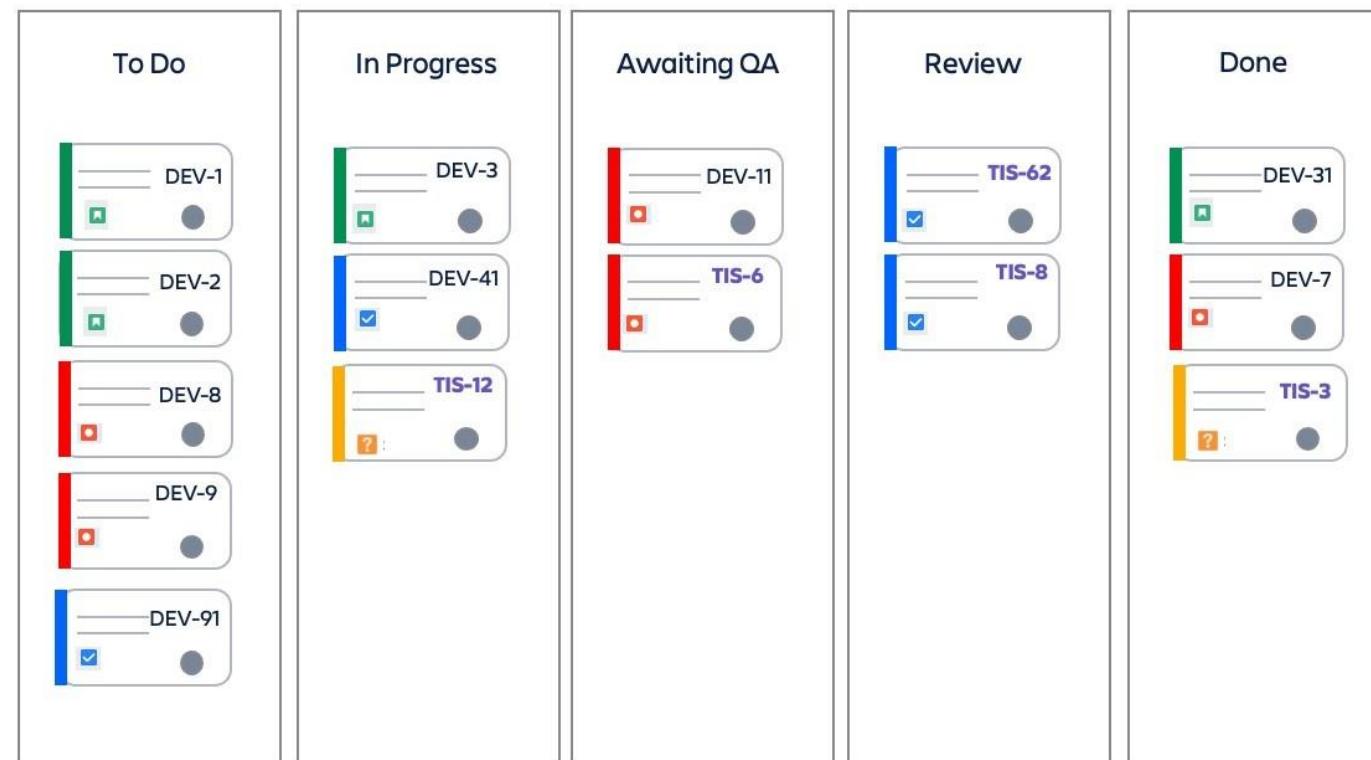
Example: All issue types, one project



Example: Multiple projects



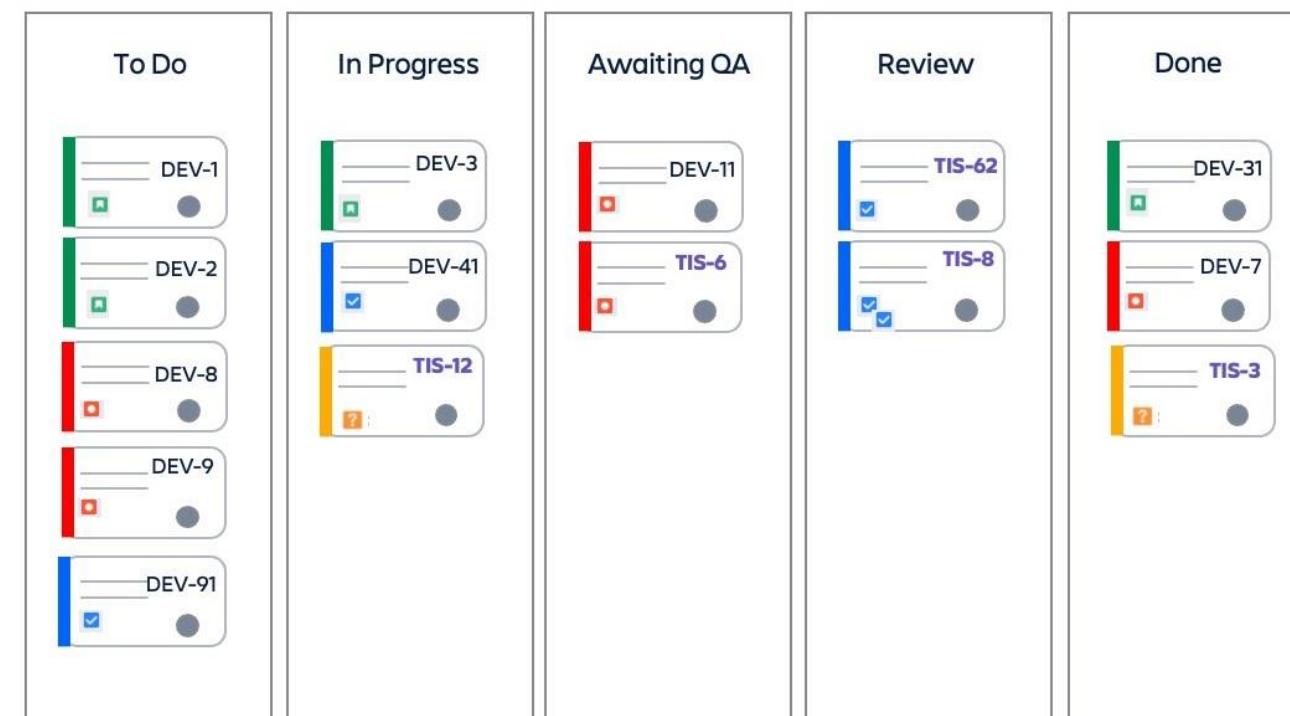
Example: Multiple issue types and projects



Example: Multiple workflows in a project

Dev Workflow Scheme

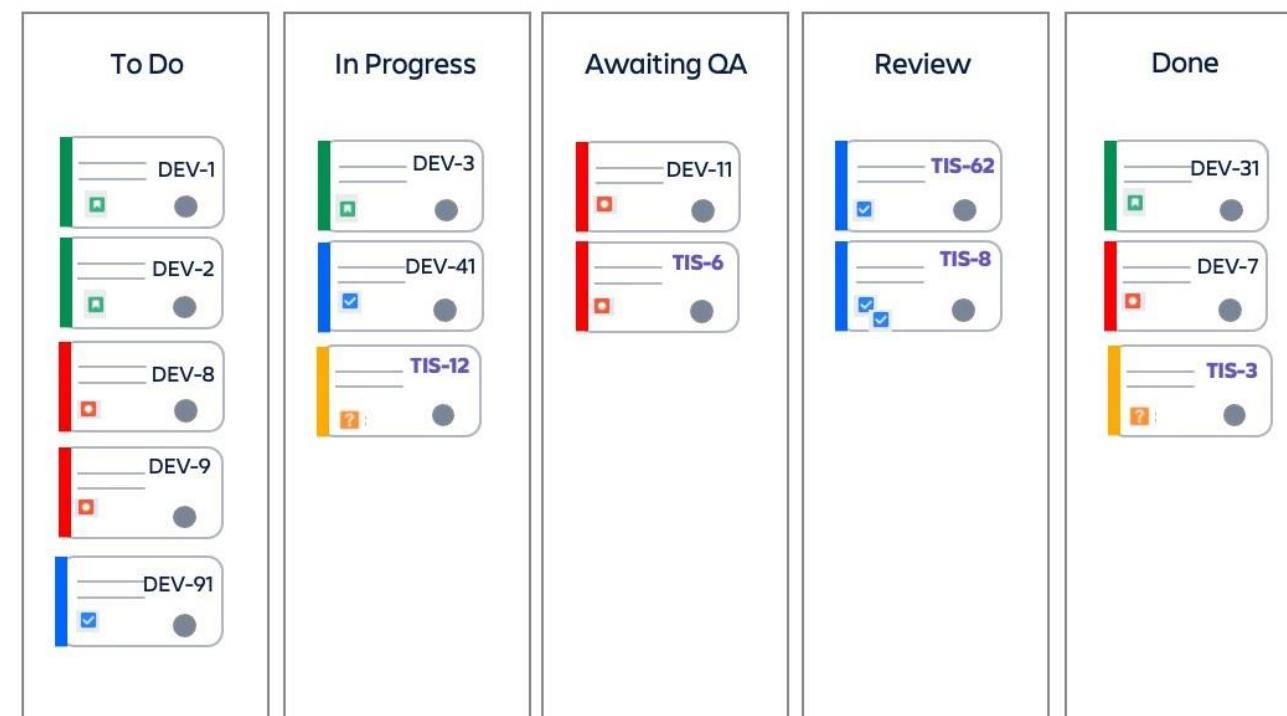
- ❑ Backlog, In Progress, Done
- ❑ New, In Progress, Awaiting QA, Resolved
- ☒ To Do, Working, Review, Closed



Example: Multiple workflows in multiple projects

Dev Workflow Scheme

- Backlog, In Progress, Done
- New, In Progress, Awaiting QA, Resolved
- To Do, Working, Review, Closed

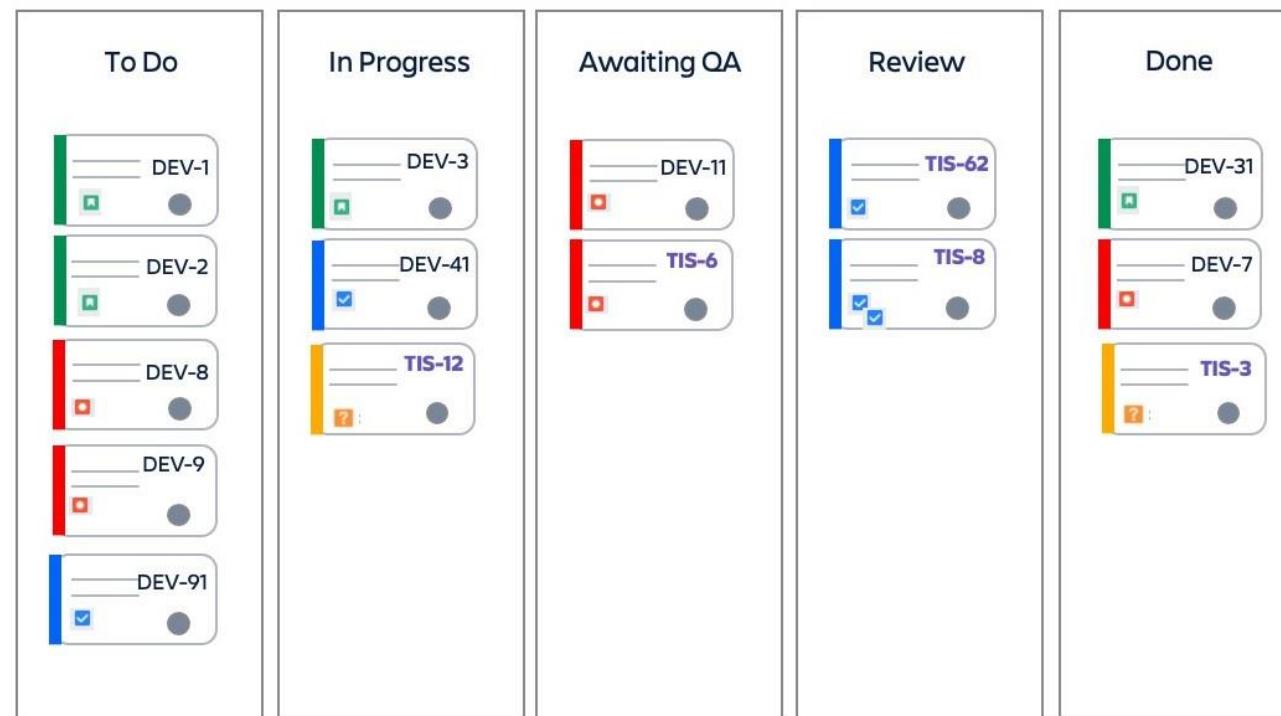


TIS Workflow Scheme

- Open, In Progress, Done
- ?
- ?



Complex boards are difficult for admins & users



As a best practice, keep workflows simple. Jira has a process to simplify workflows.



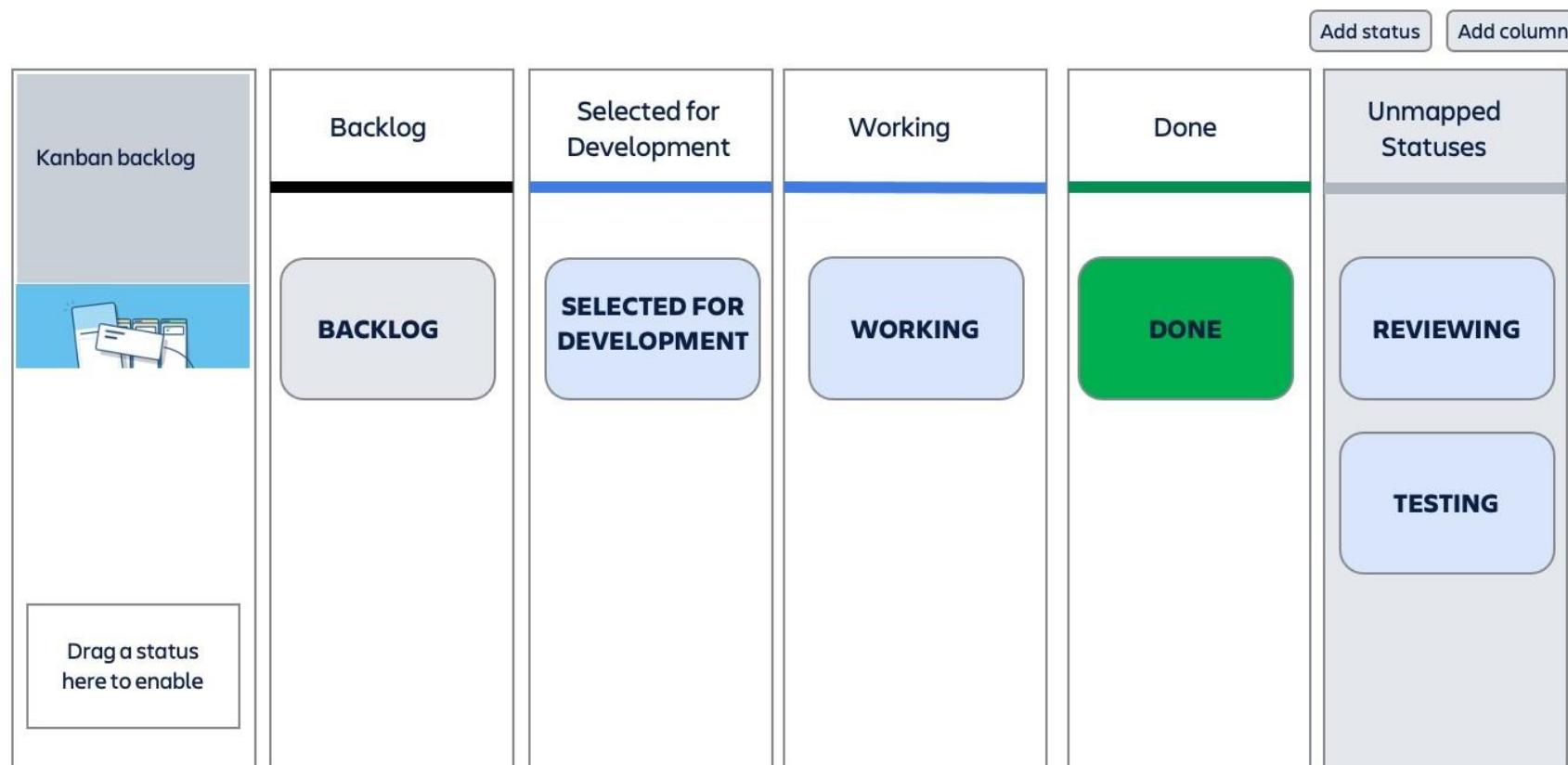
Unmapped statuses



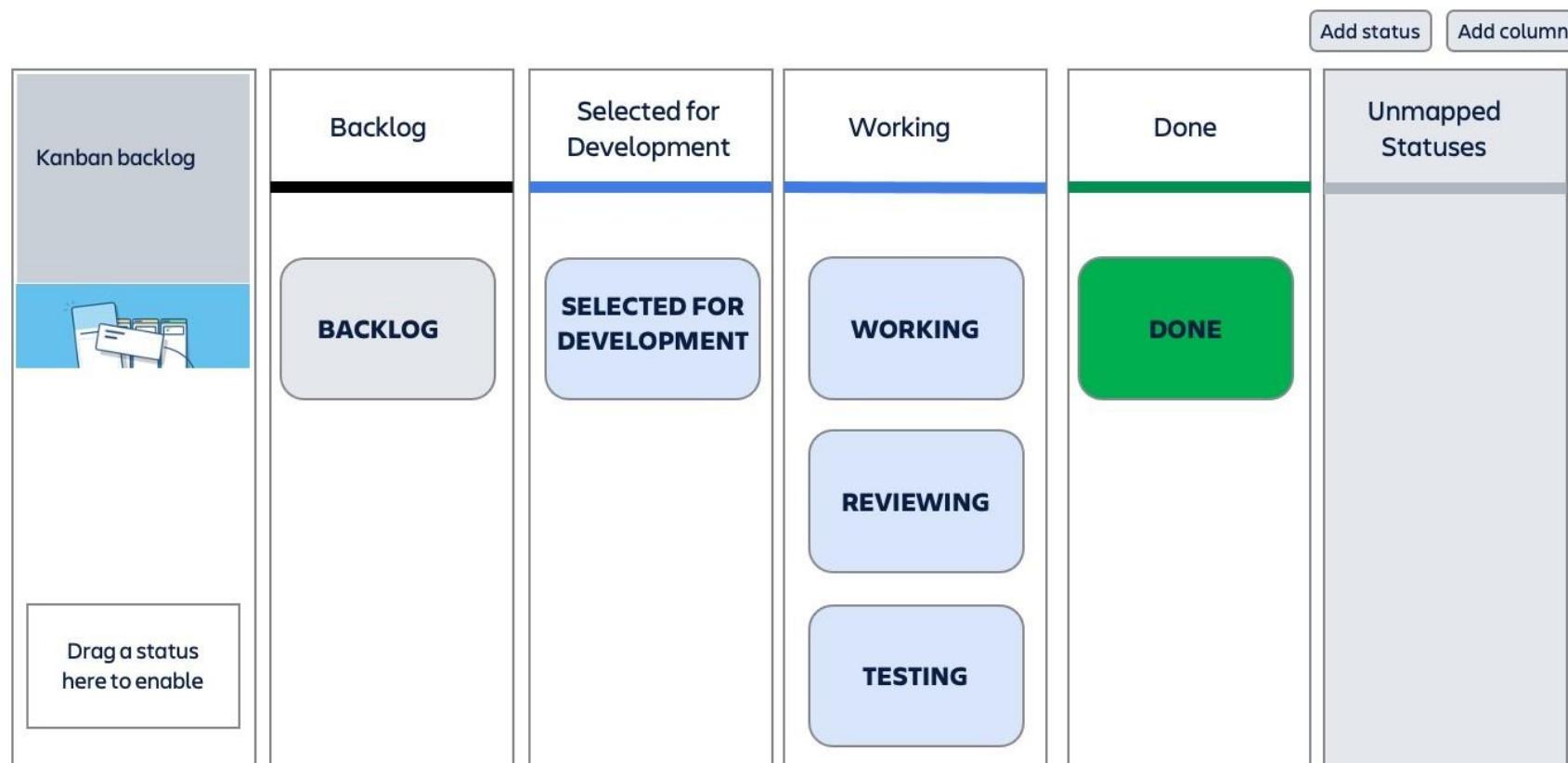
As a best practice, all statuses should be mapped to a column.



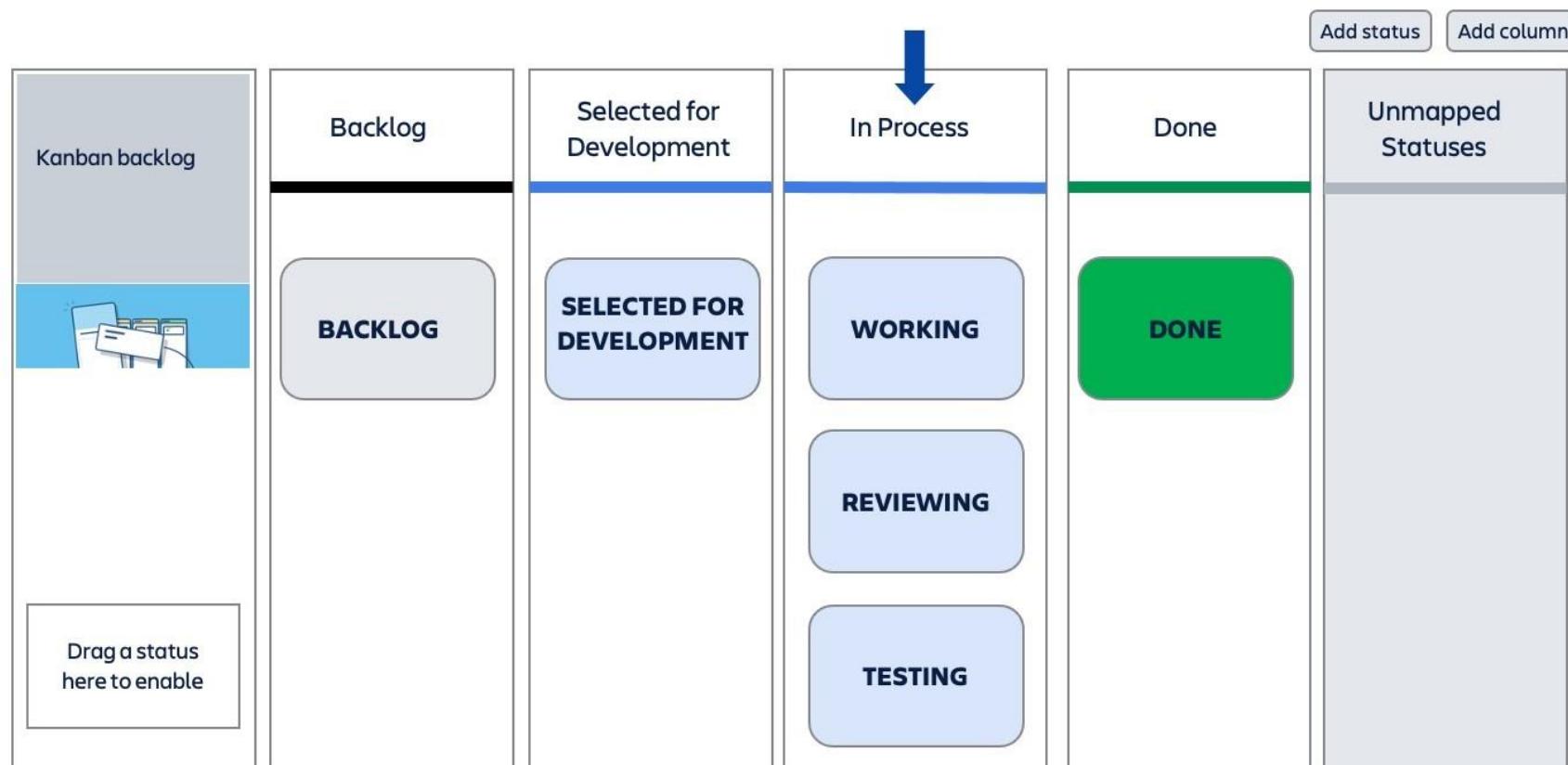
Mapping multiple statuses to a column



Mapping multiple statuses to a column



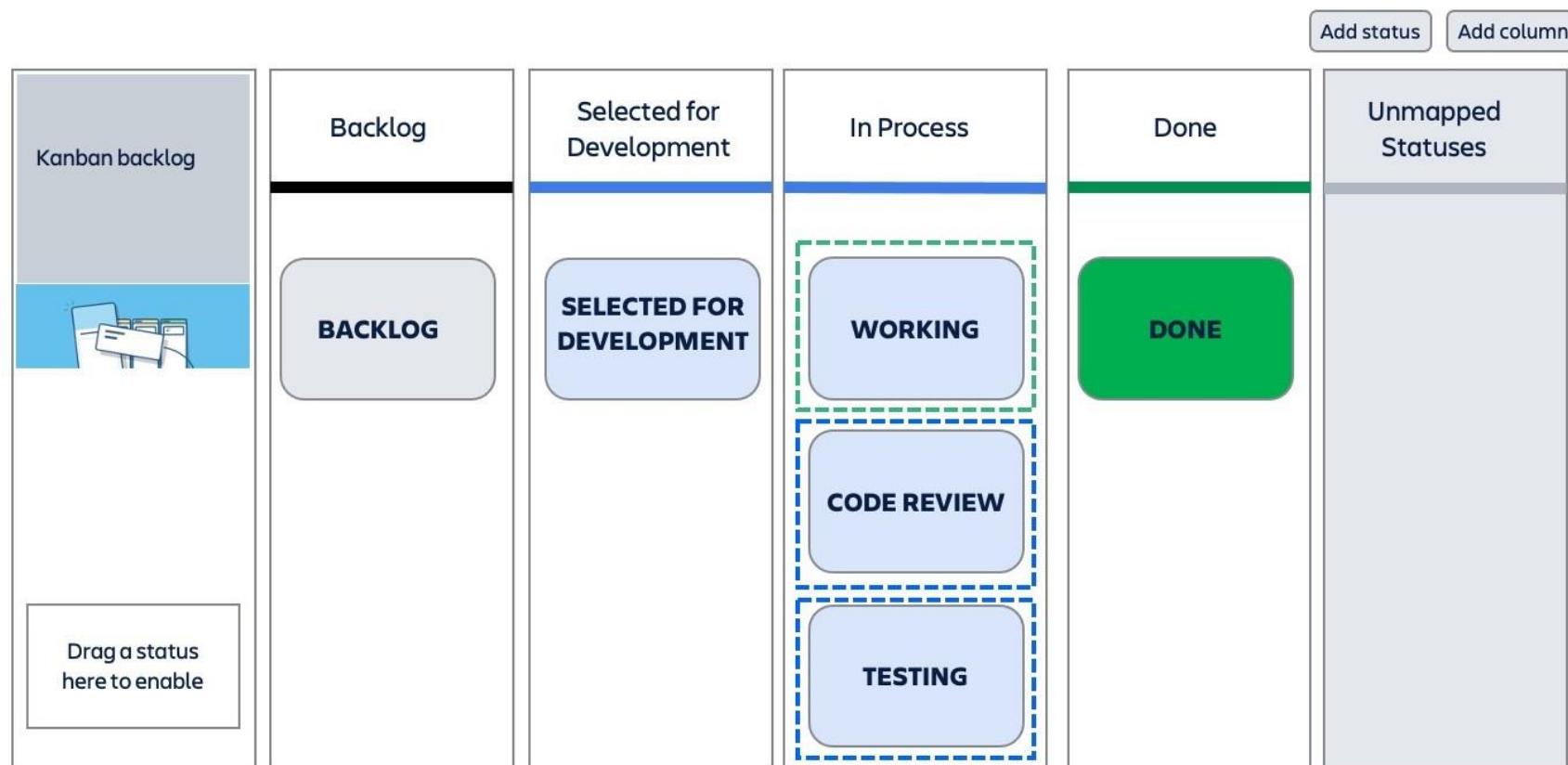
Mapping multiple statuses to a column



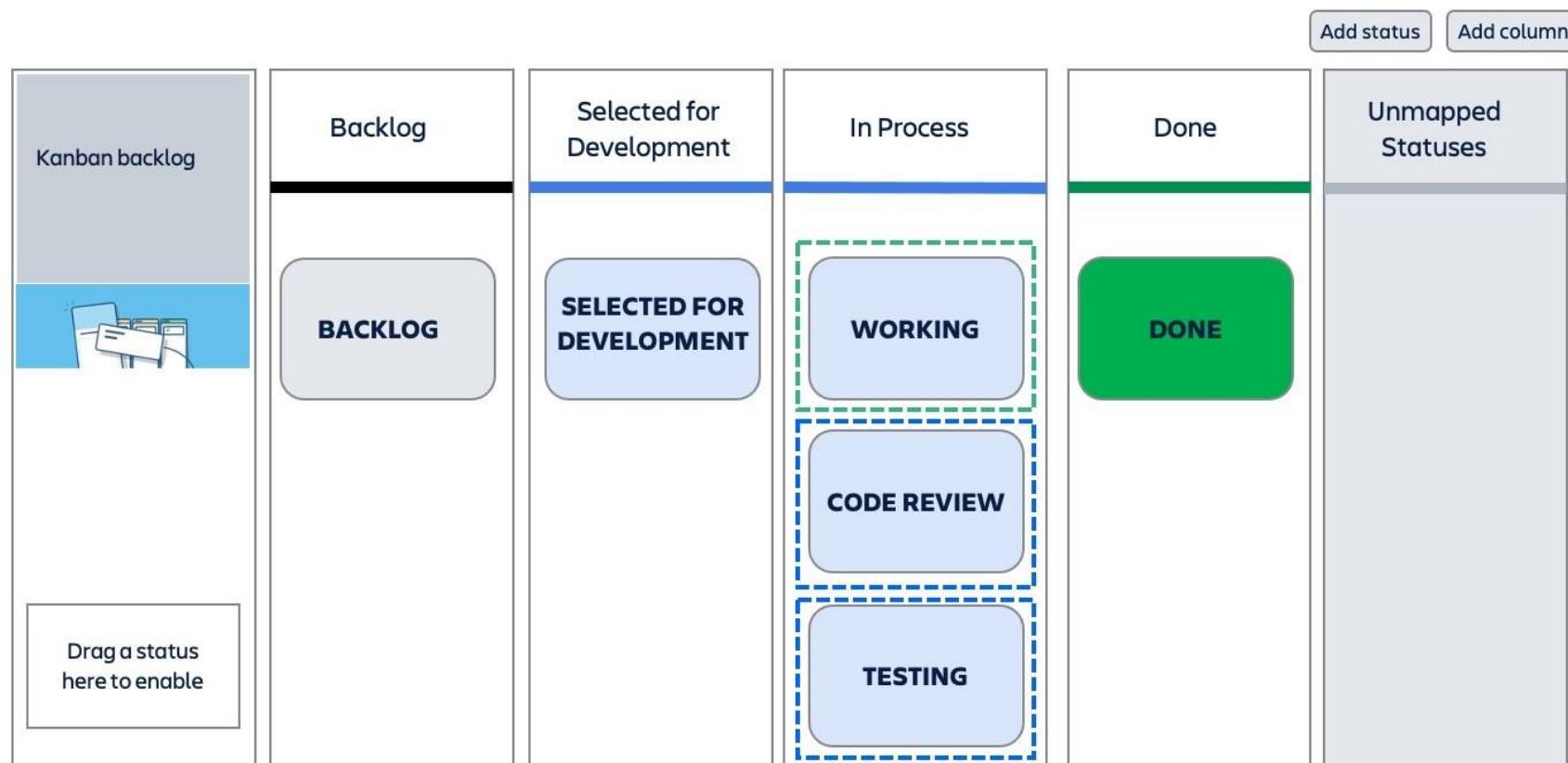
As a best practice, name columns appropriately.



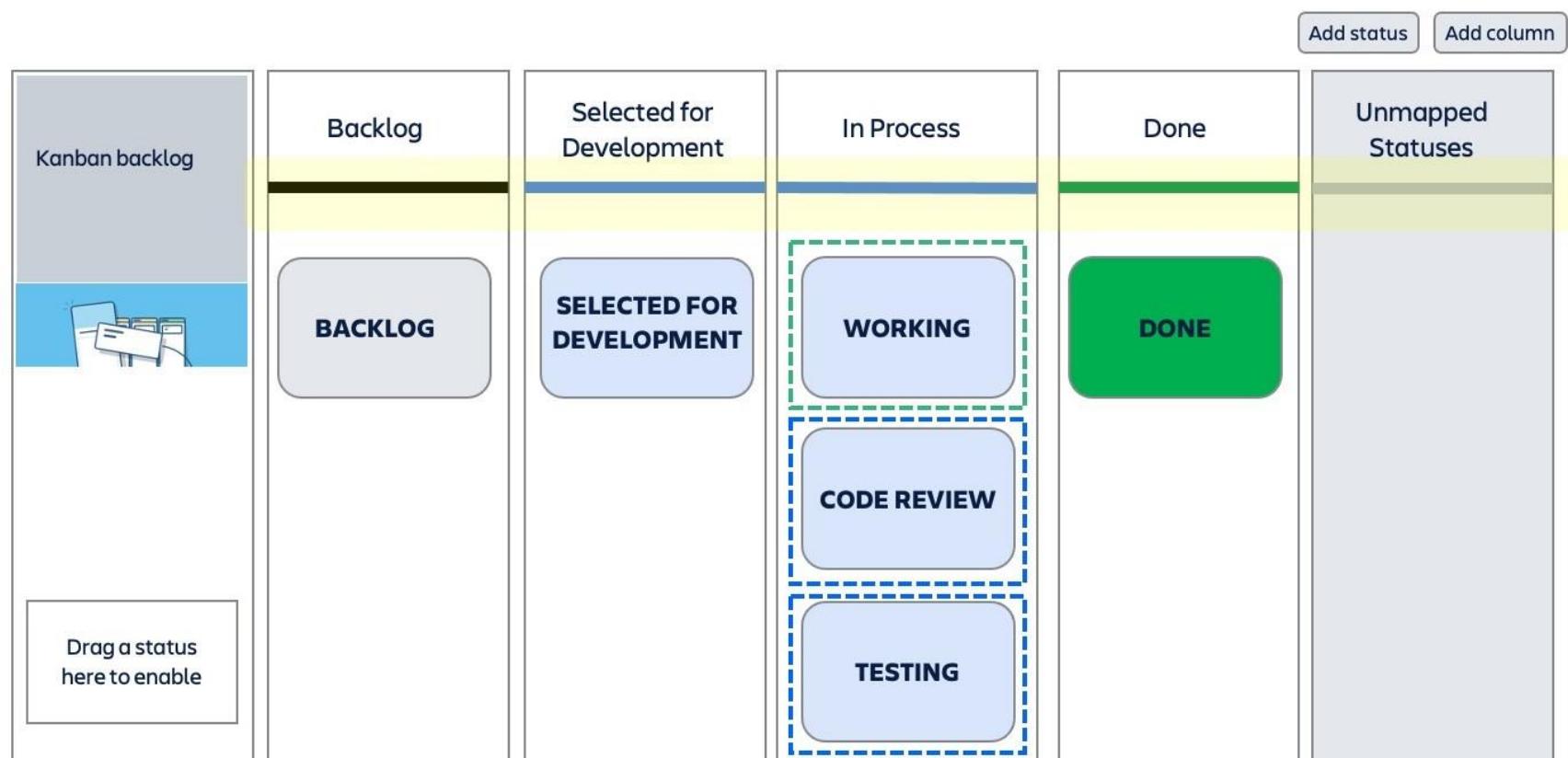
Transition to column with multiple statuses



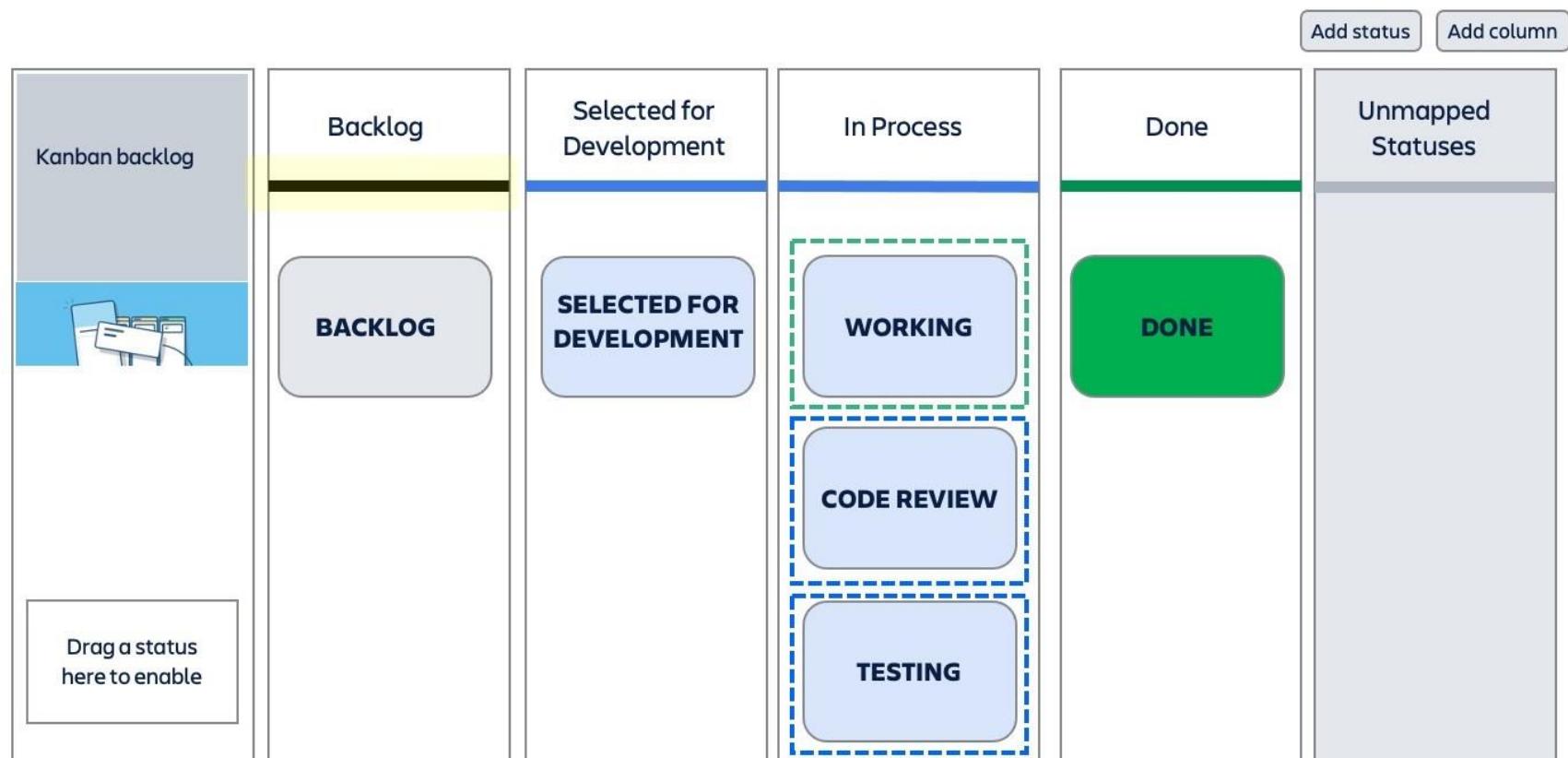
Definition of Done



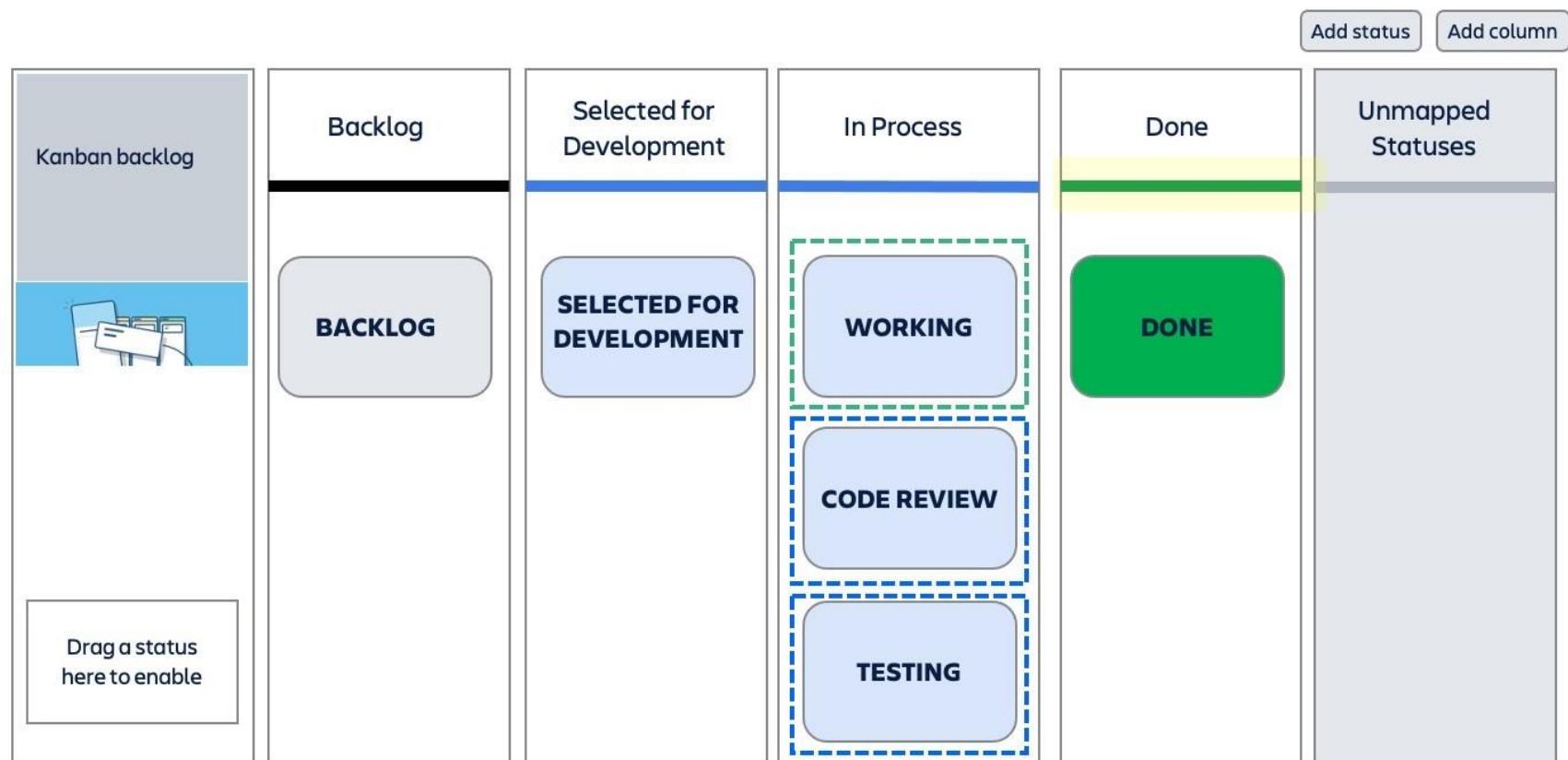
Definition of Done



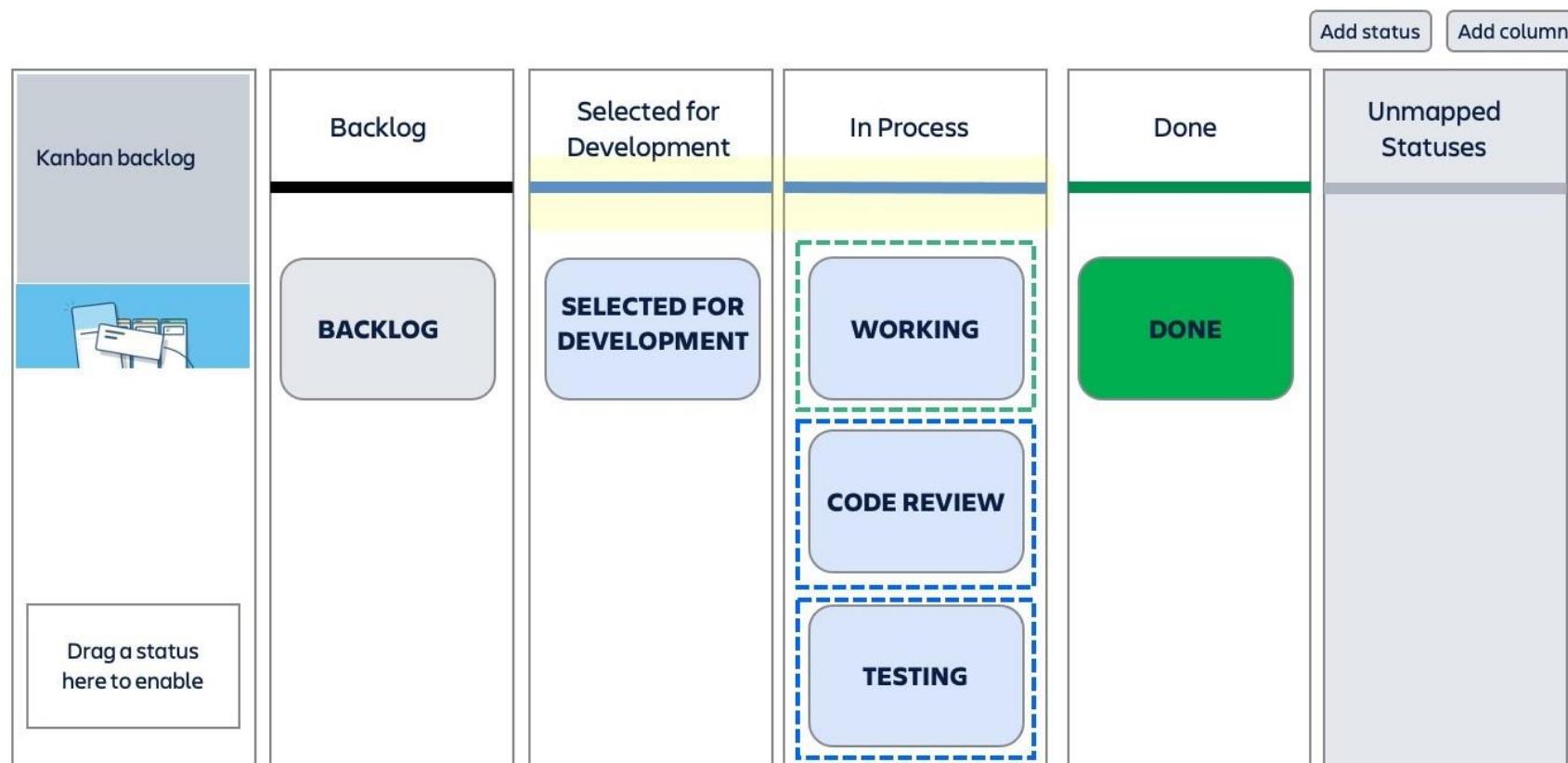
Definition of Done



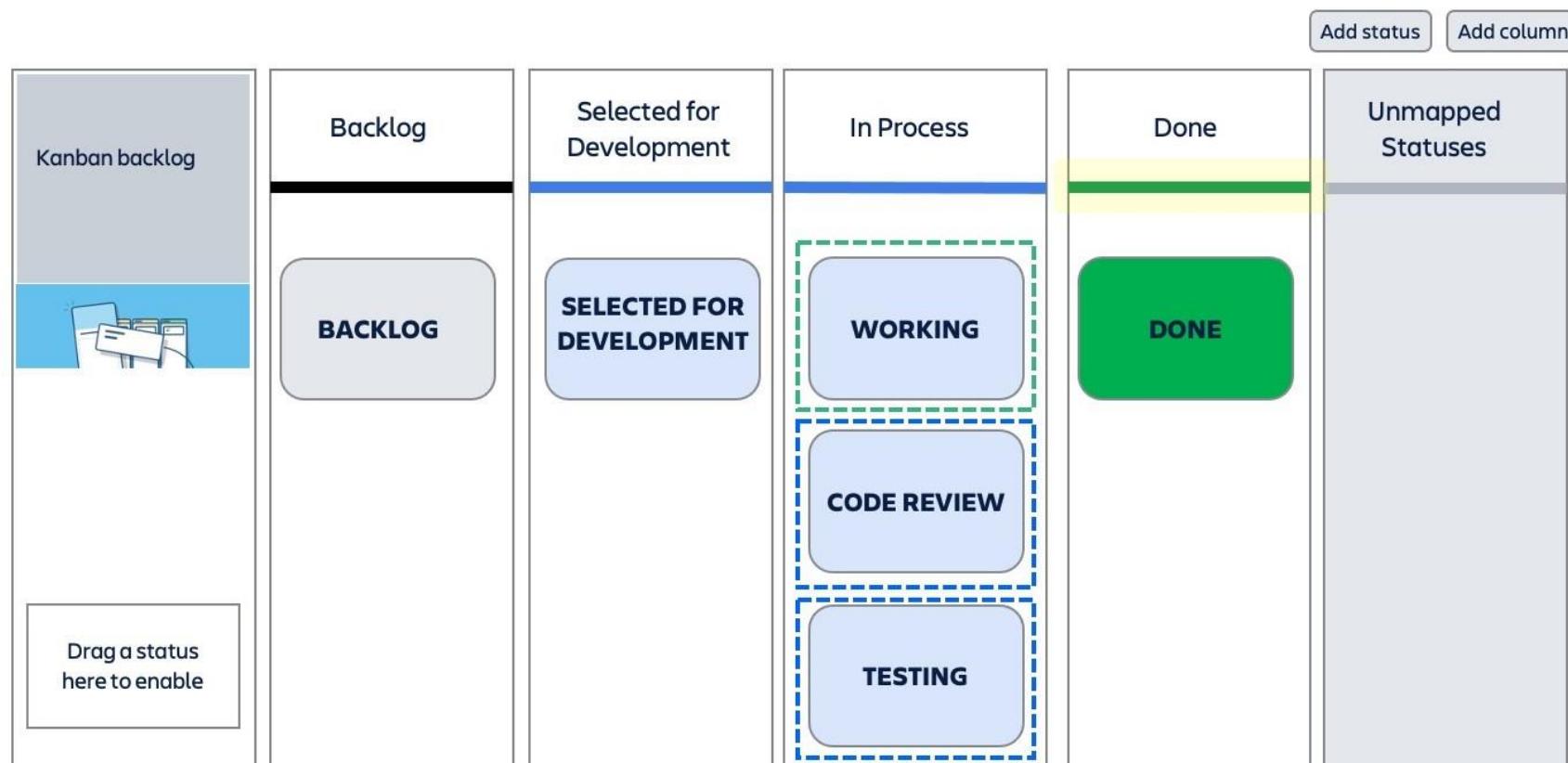
Definition of Done



Definition of Done



Definition of Done impacts reporting



Example: Columns

The screenshot shows the Jira Column Management interface with various configuration options and status counts for different columns.

- 1) Kanban backlog is enabled. Issues in Backlog status visible in a separate view**: Points to the 'Kanban backlog' section on the left.
- 2) Kanban backlog will show the Epics Panel**: Points to the 'Epics panel' toggle switch.
- 3) WIP limits based on issue count**: Points to the 'Issue Count' constraint settings for each column.
- 4) Issues dragged to Done column have their Resolution set and are considered Resolved in reports, gadgets, etc.**: Points to the 'Set resolution' checkbox in the 'Done' column settings.
- 5) Issues in Review status will not display on the board because the status is not mapped**: Points to the 'REVIEW' status entry in the 'Unmapped Statuses' list.
- 6) Issues can transition into either status because 2 statuses are mapped to single column**: Points to the 'IN PROGRESS' and 'UNDER REVIEW' status entries in the 'Development Done' column.
- 7) Simplified workflow has all global transitions, no conditions or validators**: Points to the 'Using Simplified Workflow' section.



Swimlanes settings

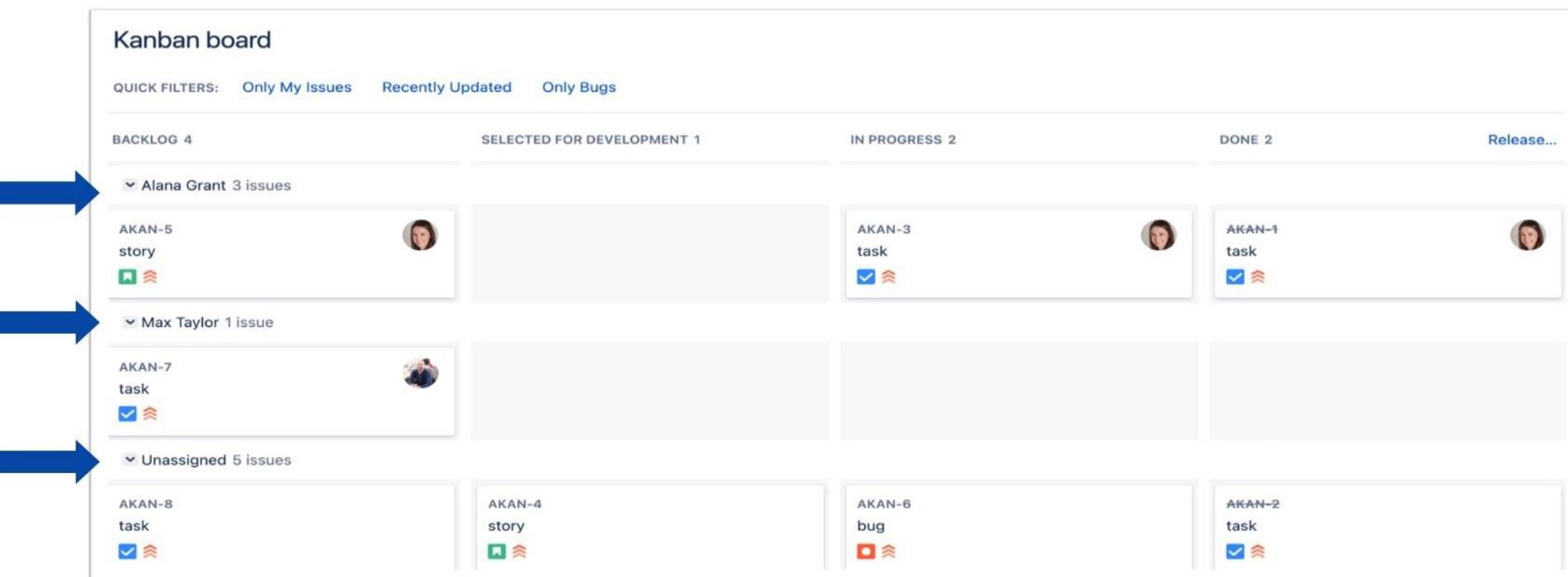


Base Swimlanes on:

- None
- Assignees
- Epics
- Projects
- Stories
- (JQL) Queries



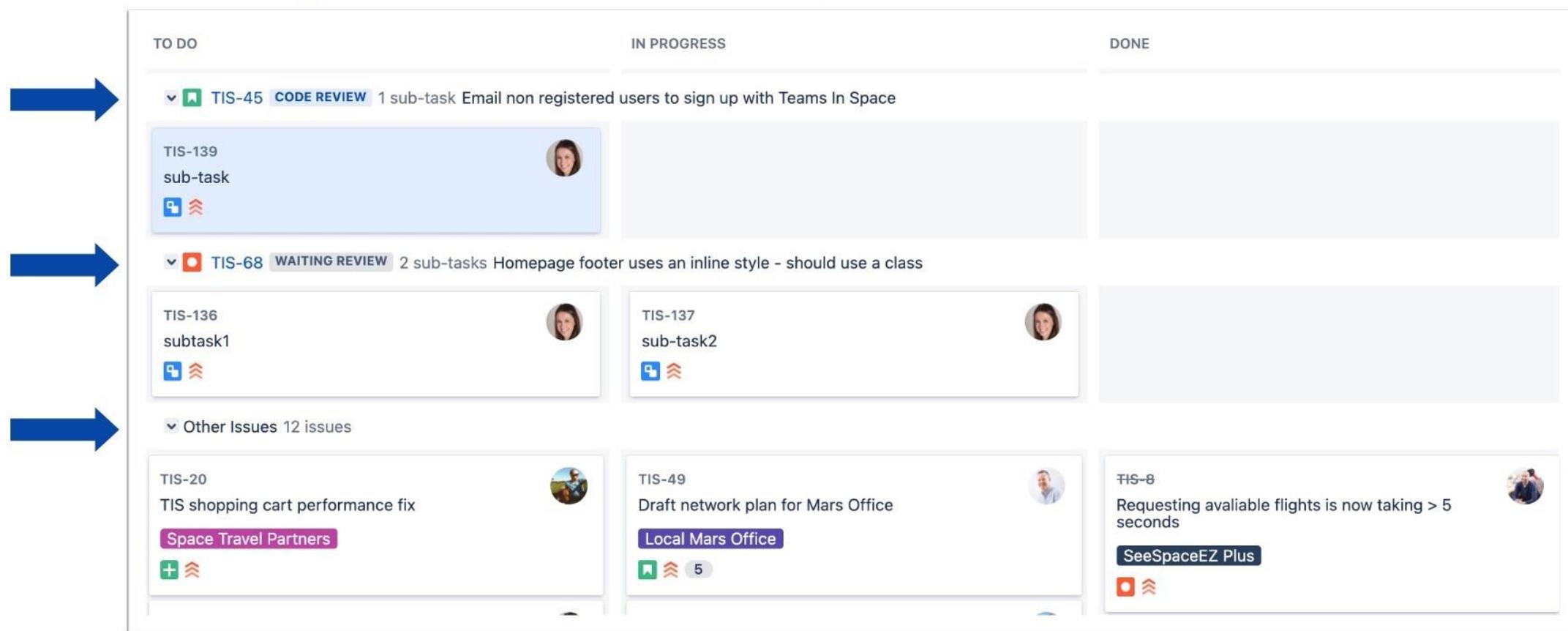
Example: Swimlanes by Assignee



Swimlanes based on Assignees. Unassigned issues shown below other swimlanes.



Example: Swimlanes by Stories



Swimlanes based on Stories with sub-tasks then other issues without sub-tasks



Example: Swimlanes by Queries

The screenshot shows a Jira board with three columns: TO DO (75), IN PROGRESS (14), and DONE (1 OF 44). A blue arrow points to the first column, and another blue arrow points to the second column.

TO DO 75

- Expedite 2 issues
 - TIS-12 Create 90 day plans for all departments in the Mars Office
Local Mars Office
 - TIS-9 After 100,000 requests the SeeSpaceEZ server dies
SeeSpaceEZ Plus
- Everything Else 88 issues
 - TIS-45 Email non registered users to sign up with Teams In Spa...
TIS-139 sub-task
Large Team Support
 - TIS-68 Homepage footer uses an inline style - should use a class
Large Team Support
 - TIS-45 Email non registered users to sign up with Teams In Space
Large Team Support
 - TIS-49 Draft network plan for Mars Office
Local Mars Office

IN PROGRESS 14

DONE 1 OF 44

Release...

We're only showing recently modified issues.
Looking for an older issue?



Swimlanes based on Stories with sub-tasks then other issues without sub-tasks



Swimlanes by Queries – Kanban default

Name	JQL	Description
Expedite	priority = blocker	All issues with the highest priority.
Everything Else		



Issues are evaluated from top to bottom in the table.



Swimlanes by Queries - Custom

Name	JQL	Description
System Outages	(Type = Problem AND labels = Outage) OR summary ~ outage	Issues where issue type is Problem and Labels value is Outage as well as those where the Summary field contains the text “Outage”
Escalations	Status was Escalated	Issues where the status currently is, or ever was, Escalated
Platinum Support	“Support Level” = Platinum	Issues where the “Support Level” custom field equals Platinum
Everything Else		Everything Else



Swimlanes by Queries - Custom

Name	JQL	Description
System Outages	(Type = Problem AND labels = Outage) OR summary ~ outage	Issues where issue type is Problem and Labels value is Outage as well as those where the Summary field contains the text “Outage”
Escalations	Status was Escalated	Issues where the status currently is, or ever was, Escalated
Platinum Support	“Support Level” = Platinum	Issues where the “Support Level” custom field equals Platinum
Everything Else		Everything Else



Issues are evaluated from top to bottom in the table.



Quick Filters settings



- By default, a board displays all the issues returned by the board filter
- Quick filters can be used to further filter the issues in the board based on an additional JQL query (or more)
- Configured by board administrators
- Used by individual users to temporarily affect their own display
- On/off toggle



Quick Filters - default

Name	JQL	Description
Only my Issues	assignee = currentUser()	Displays issues which are currently assigned to the current user
Recently updated	updated >= -1d	Displays issues which have been updated in the last day



Quick Filters - Custom

Name	JQL	Description
Only my Issues	assignee = currentUser()	Displays issues which are currently assigned to the current user
Recently updated	updated >= -1d	Displays issues which have been updated in the last day
Only Bugs	type = Bug	Displays only Bug issues types
Has Component	Component is not EMPTY	Displays issues that have one or more Components selected



Example: Quick Filters

QUICK FILTERS: Only My Issues Recently Updated Only Bugs Has Component

TO DO

TIS-68 Homepage footer uses an inline style - should use a class
TIS-136 subtask1
TIS-20 TIS shopping cart performance fix

IN PROGRESS

DONE

TIS-8 Requesting available flights is now taking > 5 seconds
SeeSpaceEZ Plus



Card Colors settings

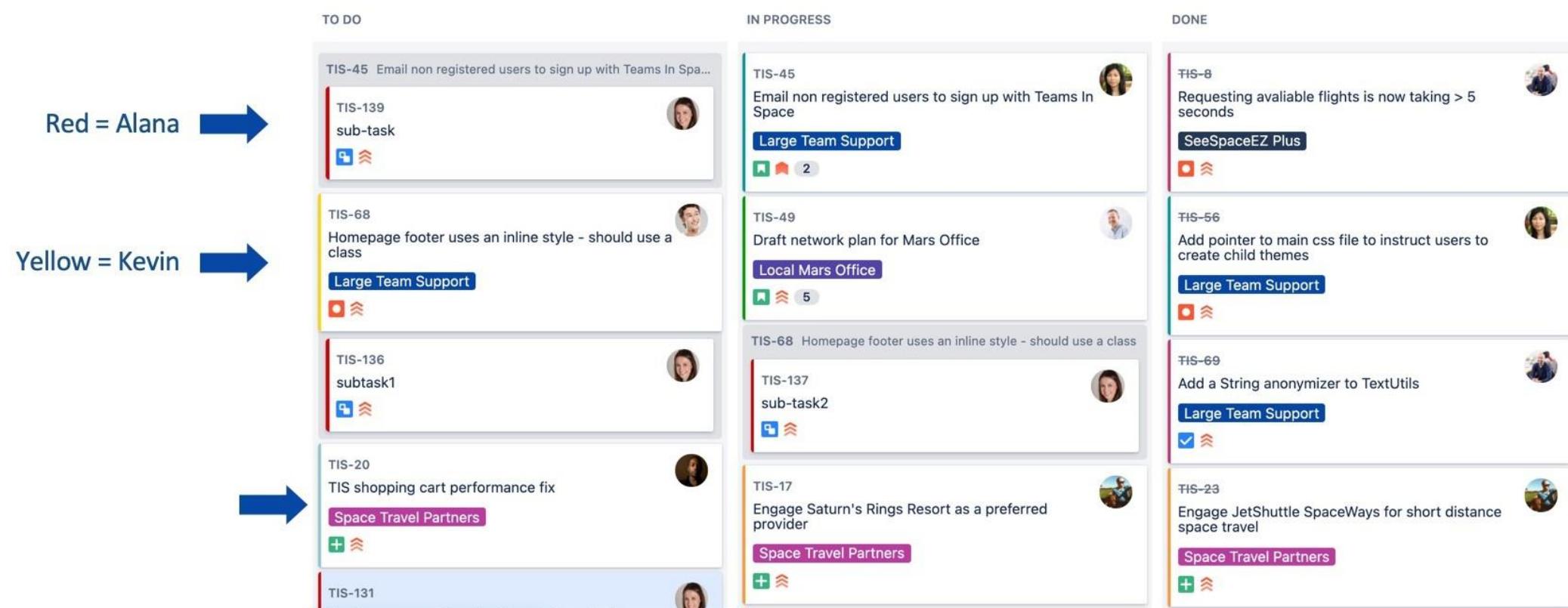


Colors based on:

- None
- Issue Types
- Priorities
- Assignees
- Queries



Example: Card Colors



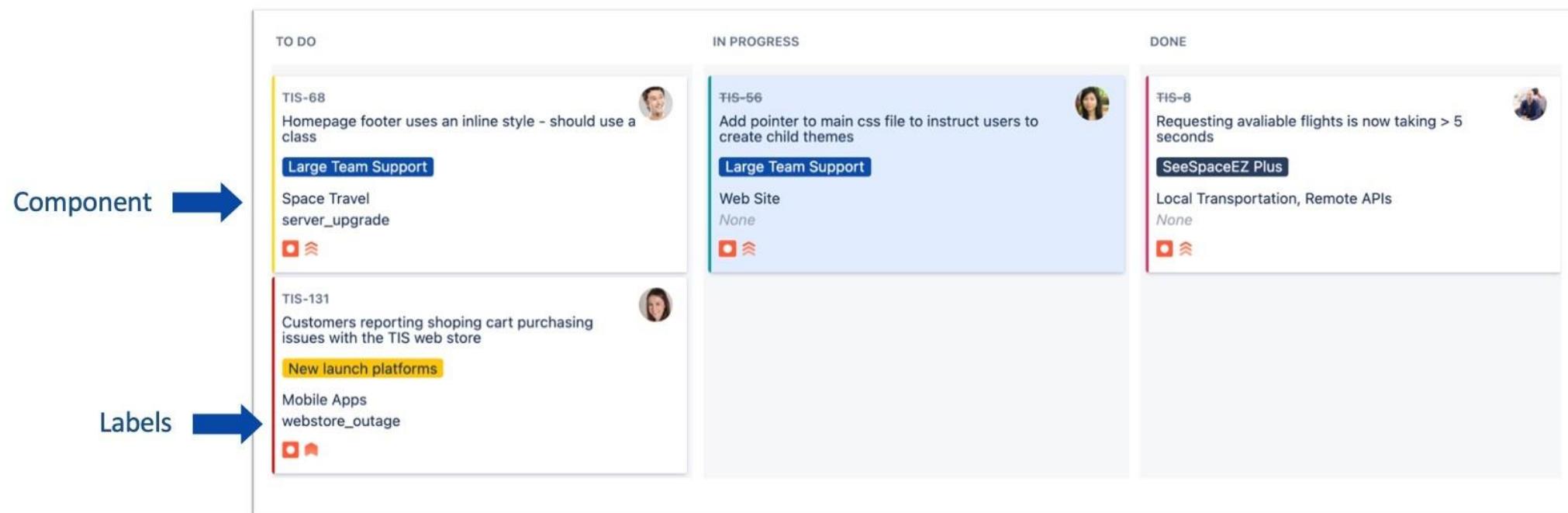
Card Layout settings



- Cards can be configured to show up to three extra fields.
- Scrum boards (Backlog and Active Sprints)
- Kanban boards (Backlog, if enabled, and main Kanban board)



Example: Card Layout



Estimation settings



Scrum boards
only



Estimation settings



Estimation Statistic

- Story Points
- Original Time Estimate
- Issue Count
- Numeric custom field

Scrum boards
only



Estimation settings



Estimation Statistic

- Story Points
- Original Time Estimate
- Issue Count
- Numeric custom field

Scrum boards
only

Time Tracking

- None
- Remaining Estimate and Time Spent



Estimation settings



Estimation Statistic

- Story Points
- Original Time Estimate
- Issue Count
- Numeric custom field

Scrum boards
only

Time Tracking

- None
- Remaining Estimate and Time Spent



Unit of time depends on Jira system configuration



Successful estimation

- Aim for reliable velocity
- Estimate issues **before** starting a sprint
- Complete your sprints (on time)
- Avoid scope changes
- Map all statuses to columns



Successful estimation

- Aim for reliable velocity
- Estimate issues **before** starting a sprint
- Complete your sprints (on time)
- Avoid scope changes
- Map all statuses to columns

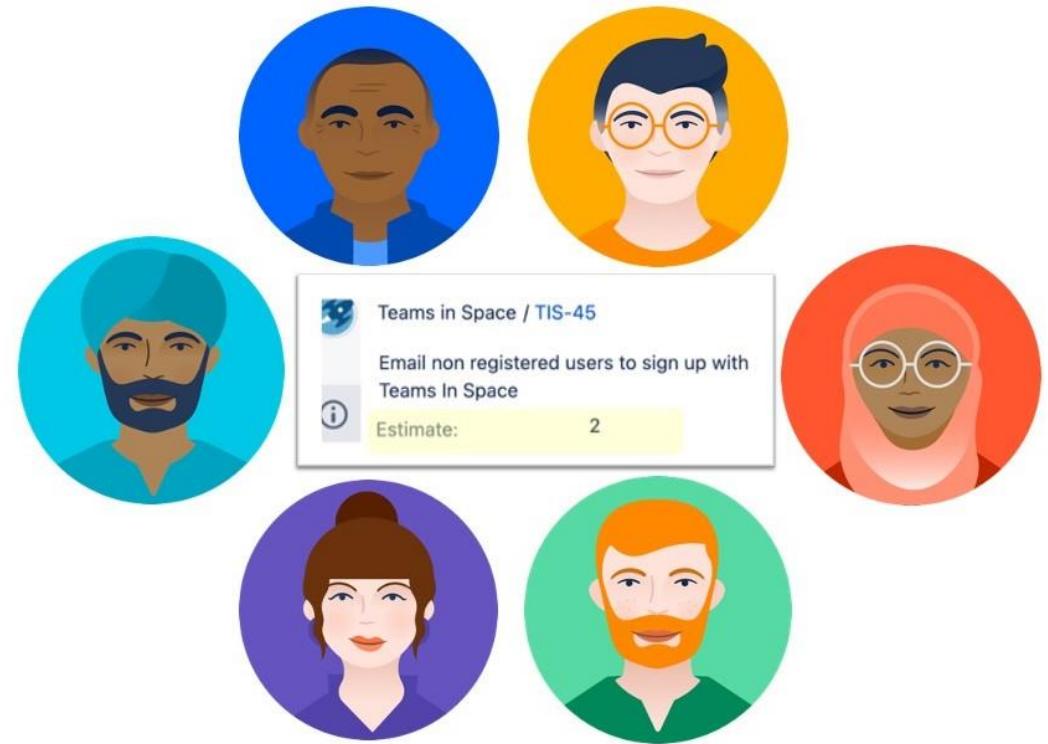


Estimation improves over time ...



Successful estimation

- Aim for reliable velocity
- Estimate issues **before** starting a sprint
- Complete your sprints (on time)
- Avoid scope changes
- Map all statuses to columns



Estimation improves over time especially when everyone on the team is involved and brings their own perspective on the work required to deliver a story.



Story Points

- Most common estimation statistic
- Relative measure of the amount of work required to complete an issue
- Helps the team decide how many issues can be completed in a sprint



Story Points

- Most common estimation statistic
- Relative measure of the amount of work required to complete an issue
- Helps the team decide how many issues can be completed in a sprint
- Reduces anxiety around accuracy
- Available only on Story and Epic issue types by default



Don't assign time values to story points.



Example: Estimation

1) Active Sprint

Sprint 6 16 issues - ACTIVE
25/Oct/21 11:05 PM - 22/Nov/21 11:05 PM View linked pages

TIS-30 Create Saturn Summer Sizzle Logo (2.2)
TIS-49 Draft network plan for Mars Office (2.1)
TIS-45 Email non registered users to sign up with Teams In Spa... (3.0)
TIS-12 Create 90 day plans for all departments in the Mars Office (2.1)
TIS-37 When requesting user details the service should return prior tri... (2.1)
TIS-8 Requesting available flights is now taking > 5 seconds (2.0)

2) This story has an estimate of 2 Story Points

3) Unestimated Story.
Estimating it later will be considered Scope Change

4) Story Points field is not available on Bugs (by default)

Story Points

Create Saturn Summer Sizzle Logo
Estimate: 2
Details
Status: CLOSED (View Workflow)
Priority: Major
Component/s: Deals and Offers
Labels: None
Affects Version/s: 1.5
Fix Version/s: 2.2
Epic Link: Summer Saturn Sale



Working Days settings



Time Zone

- Region
- Time Zone

Standard Working Days

- Monday ... Sunday

Non-Working Days

- Dates



Example: Working Days

Working days

These settings allow you to highlight or exclude non-working days from reports and gadgets.

They apply to the following reports: Burndown Chart, Sprint Report, Epic Report, Version Report, Control Chart; and the following gadgets: Sprint Health Gadget, Burndown Gadget.

Time Zone

Region: Asia

Time Zone: (GMT+02:00) Jerusalem

Standard Working Days

Every Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Non-Working Days

Dates: 6/Sep/21 ✖ 7/Sep/21 ✖ 8/Sep/21 ✖
15/Sep/21 ✖ 16/Sep/21 ✖ 20/Sep/21 ✖
21/Sep/21 ✖

Add Date



Example: Working Days

Working days

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Non-Working Days

Dates: 6/Sep/21 × 7/Sep/21 × 8/Sep/21 ×
15/Sep/21 × 16/Sep/21 × 20/Sep/21 ×
21/Sep/21 ×

Add Date



Issue Detail View settings



- Allows you to add, delete or reorder fields on the Issue Detail View.
- Customize the information shown about the selected card
- Update fields in different sections



Example: Issue Detail View

Issue Detail View
Add, delete or reorder fields on the Issue Detail View.

General fields

Field name	Access to Secure areas?	Add
Status	Delete	
Labels	Delete	

Date fields

Field name	Begin Date	Add
Due Date	Delete	
Updated	Delete	

people

Field name	Approvers	Add
Reporter	Delete	
Assignee	Delete	

Links

Field name		
------------	--	--

The screenshot shows the Jira Issue Detail View for ticket TIS-30. The ticket is titled "Create Saturn Summer Sizzle Logo" and is assigned to "Summer Saturn Sale". It has an estimate of 2.2 and is part of Sprint 6. The ticket is labeled "CLOSED" and was last updated on 22/Nov/21 at 11:05 PM. The details panel shows the ticket is closed with a green "CLOSED" button and a "View Workflow" link. The people panel lists the reporter as Ryan Lee and the assignee as Cassie Owens, with an "Assign to me" button. A large blue arrow points from the left side of the screen down to the ticket details in the center.

Use Case



I need some board changes:

- add testing into the process and ensure that development is done before testers pull work into Testing
- have only 3 issues being tested at a time
- show the Platform field on each card

Updating board configuration

We need to decide which board changes will meet Claudia's needs and how to make those changes.



Walkthrough



Knowledge Check



Your team wants to see issues organized into 3 groups from top of the board to the bottom, and the rest of the issues beneath them:

1. Issues labeled “system” or “error”
2. Issues with a component
3. Unassigned issues

Which board feature meets their need?

- A. **Swimlanes**
- B. **Card layout**
- C. **Card colors**
- D. **Issue Detail View**



Knowledge Check



Your team wants to see issues organized into 3 groups from top of the board to the bottom, and the rest of the issues beneath them:

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- A. **Swimlanes**
- B. Card layout
- C. Card colors
- D. Issue Detail View



Agile Reports

Analyzing board data to improve
team efficiency



Agile Reports Overview

- Visualize the work
- Assess the progress of current work (commitment vs. actuals); respond if needed
- Review past performance to continuously improve in the future
- Promote transparency
- Help with troubleshooting
- Aid in planning and estimating

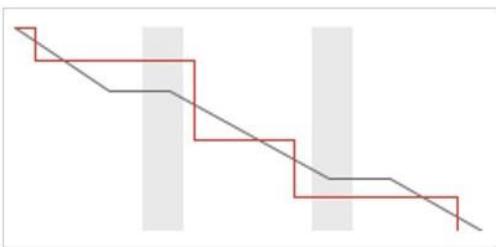


Board-specific

- Only include data about the issues that match the board filter
- The concepts of "To do" and "Done" depend on how statuses are mapped (the Definition of Done)
- Scrum reports use the estimation statistic (usually story points)



Types of Reports - Burndown

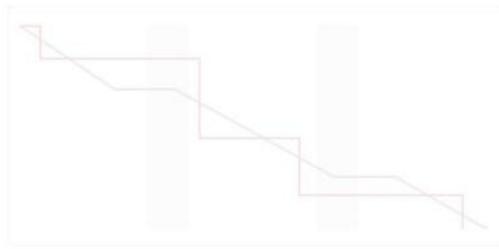


Burndown

Burndown Chart
Burnup Chart
Epic Burndown
Release Burndown



Types of Reports - Status



Burndown

Burndown Chart
Burnup Chart
Epic Burndown
Release Burndown

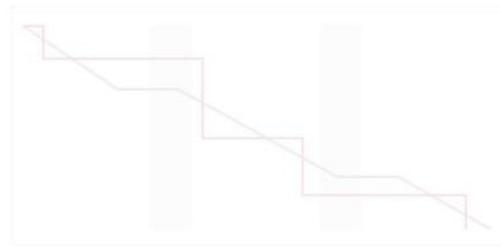


Status

Sprint Report
Epic Report
Version Report



Types of Reports – Continuous Improvement



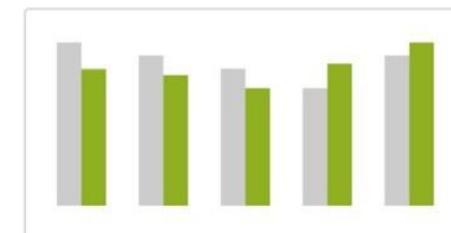
Burndown

Burndown Chart
Burnup Chart
Epic Burndown
Release Burndown



Status

Sprint Report
Epic Report
Version Report

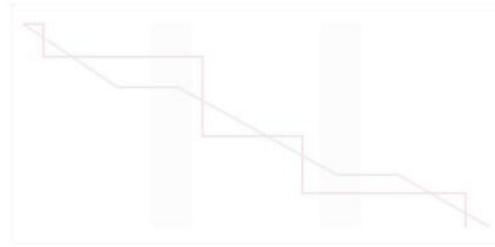


Continuous Improvement

Velocity Chart
Cumulative Flow Diagram
Control Chart

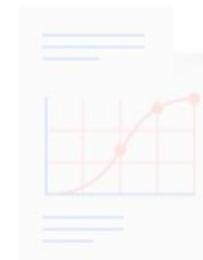


Types of Reports – Continuous Improvement



Burndown

Burndown Chart
Burnup Chart
Epic Burndown
Release Burndown



Status

Sprint Report
Epic Report
Version Report



Continuous Improvement

Velocity Chart
Cumulative Flow Diagram*
Control Chart*



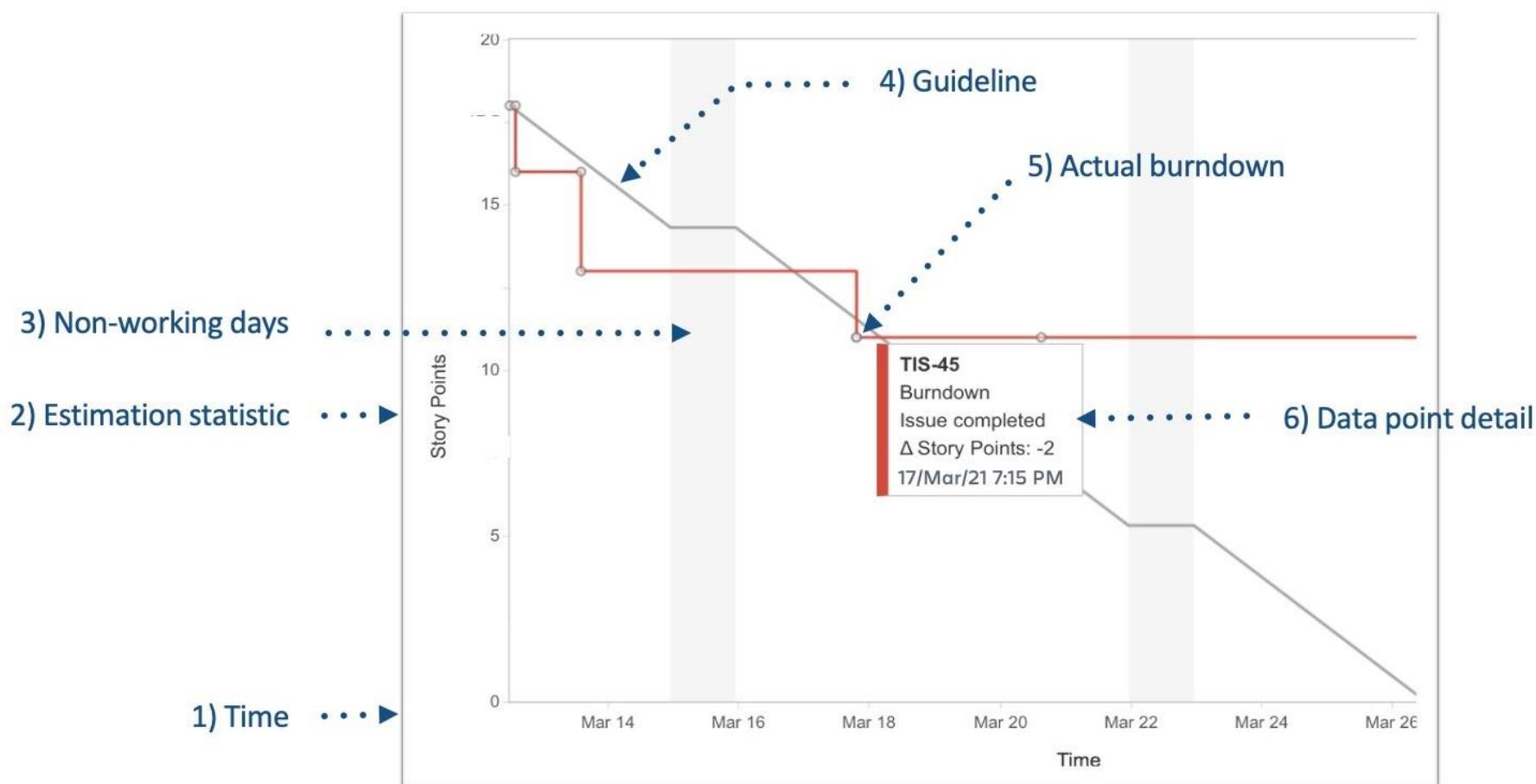
Burndown Chart



- Tracks the total work remaining in sprint
- Shows the actual vs. estimated amount of work to be completed
- Projects the likelihood of achieving the sprint goal
- Helps the team manage its progress and respond accordingly



Example: Burndown Chart



Example: Burndown Chart Detail

Date	Issue	Event Type	Event Detail	Inc.	Dec.	Remaining
	TIS-30	Scope change	Issue added to sprint	2		18
15/Jul/21 1:09 AM	TIS-8	Burndown	Issue completed	0		18
15/Jul/21 1:10 AM	TIS-30	Burndown	Issue completed		2	16
16/Jul/21 1:12 AM	TIS-69	Burndown	Issue completed	0		16
16/Jul/21 1:13 AM	TIS-23	Burndown	Issue completed		3	13
20/Jul/21 6:15 AM	TIS-45	Burndown	Issue completed		2	11
	TIS-56	Burndown	Issue completed	0		11
27/Jul/21 2:54 AM	TIS-67	Burndown	Issue completed	0		11
27/Jul/21 2:55 AM	TIS-67	Burndown	Issue reopened	0		11
07/Aug/21 7:14 AM	TIS-128	Scope change	Issue added to sprint	0		11
07/Aug/21 12:31 PM	TIS-131	Scope change	Issue added to sprint	0		11
	TIS-131	Burndown	Issue completed	0		11
21/Sep/21 1:38 AM	TIS-132	Scope change	Issue added to sprint	0		11



Burnup Chart



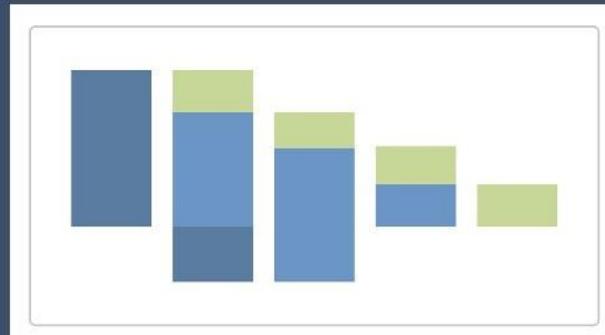
- Provides a visual representation of a sprint's completed work compared with its total scope.
- Track your team's progress towards sprint completion
- Helps identify problems related to scope creep
- Story Points on sub-tasks are not included in the Burnup Chart. (Only Story Points on parent tasks are included.)



Example: Burnup Chart



Epic Burndown



- Shows how the team is progressing against the work for an epic
- Based on estimation statistic used by the board
- See if work was added or removed during some sprint and possibly affected your team's overall progress
- Helps predict how many sprints it will take to complete the work for an epic



Example: Epic Burndown

1) Name of Epic



2) Light Blue = Work remaining at start of sprint (= 14 for Sprint 1)

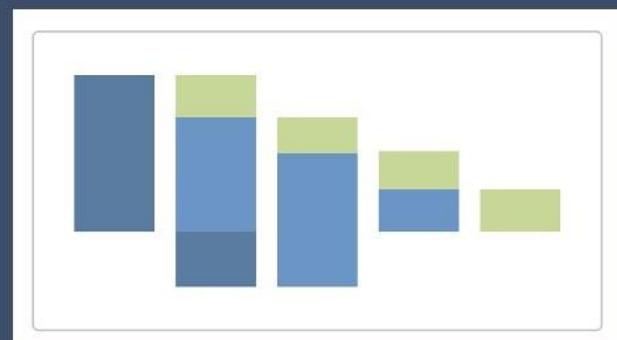
3) Light Green = Work completed during sprint (= 3 for Sprint 1)

4) Estimated # of sprints to finish the rest of the issues in this epic based on the completion rate of the first 3 sprints

5) Table with details of the issues completed in each sprint



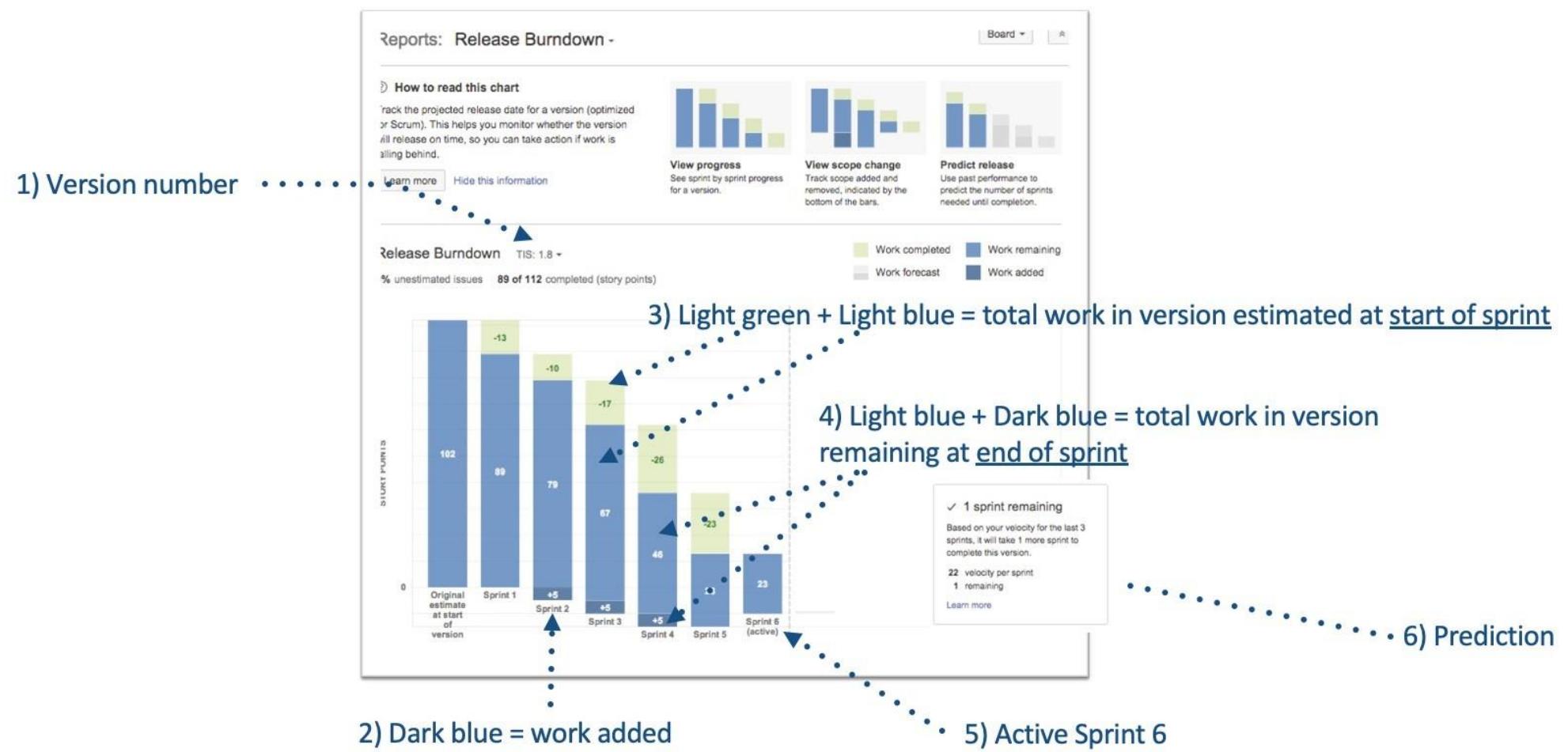
Release Burndown



- Shows how the team is progressing against the work for a release
- Based on estimation statistic
- See how quickly the team is progressing
- See if work was added or removed during some sprint and possibly affected your team's overall progress
- Helps predict how many sprints it will take to complete the work for a version



Example: Release Burndown



Sprint Report



- Shows issues in the sprint (Completed, Not completed)
- Shows scope changes (Issues Added, Issues Removed)
- Reflects initial commitment; values are recorded when sprint is started
- Useful for mid-sprint progress check and Sprint Retrospectives
- Highlights team's overcommitment or excessive scope creep



Example: Sprint Report

1) Mini burndown chart

2) Completed issues

3) All 4 issues added after sprint start

4) Not completed

Status Report

Completed Issues

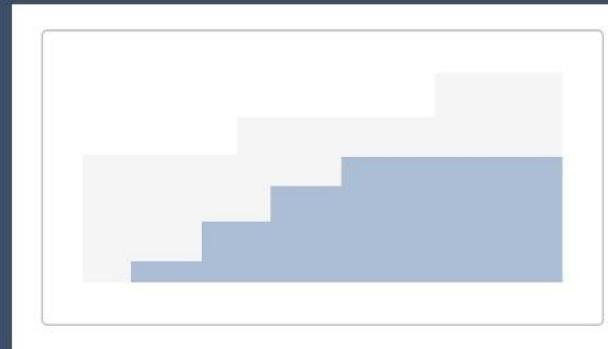
Key	Summary	Issue Type	Priority	Status	Story Points (2)
TIS-8 *	Requesting available flights is now taking > 5 seconds	Bug	Major	CLOSED	-
TIS-23 *	Engage JetShuttle SpaceWays for short distance space travel	Travel Provider	Major	CLOSED	-
TIS-30 *	Create Saturn Summer Sizzle Logo	Story	Major	CLOSED	2
TIS-69 *	Add a String anonymizer to TextUtils	Task	Major	CLOSED	-

Issues Not Completed

Key	Summary	Issue Type	Priority	Status	Story Points (16 → 8)
TIS-12 *	Create 90 day plans for all departments in the Mars Office	Story	Blocker	WAITING REVIEW	9 → -
TIS-17 *	Engage Saturn's Rings Resort as a preferred provider	Travel Provider	Major	DRAFT	-
TIS-20 *	TIS shopping cart performance fix	Travel Provider	Major	WAITING REVIEW	-
TIS-37 *	When requesting user details the service should return prior trip info	Story	Major	WAITING REVIEW	- → 1
TIS-45 *	Email non registered users to sign up with Teams In Space	Story	Critical	CODE REVIEW	2
TIS-49 *	Draft network plan for Mars Office	Story	Major	DRAFT	5
TIS-56 *	Add pointer to main.css file to instruct users to create child themes	Bug	Major	CODE REVIEW	-



Epic Report



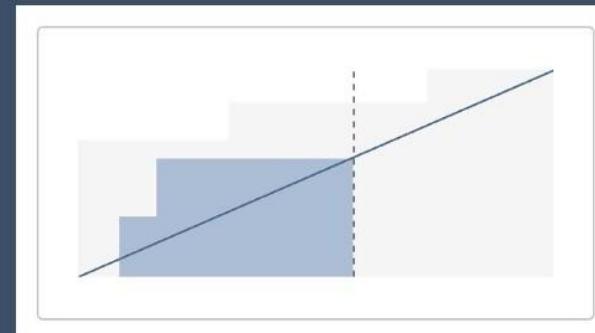
- Shows a list of complete, incomplete, and unestimated issues in an epic
- Useful in planning work for an epic that may extend over multiple sprints
- Helps understand the progress towards completing an epic over time
- Helps track the amount of remaining work that's incomplete or unestimated



Example: Epic Report



Version Report

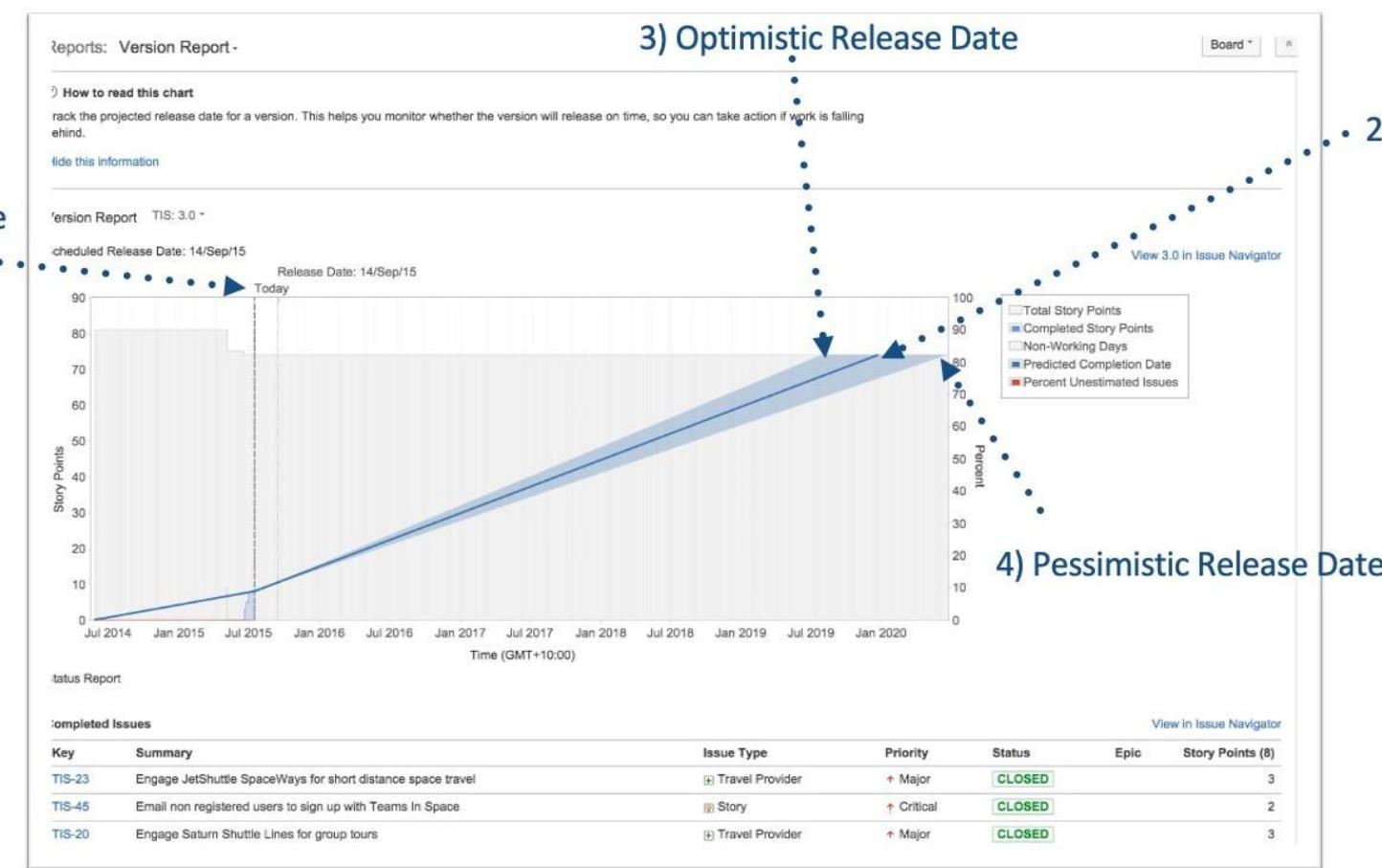


- Shows team progress towards completing a particular version and a predicted Release Date
- Excludes sub-tasks
- Shows Released but not Archived versions
- X-axis starts on the version Start Date
- Shows the state of the version at any given point in time (in terms of total and completed Story Points)
- See scope changes and progress



Example: Version Report

1) Today and Release Date



3) Optimistic Release Date

2) Predicted Release Date

4) Pessimistic Release Date



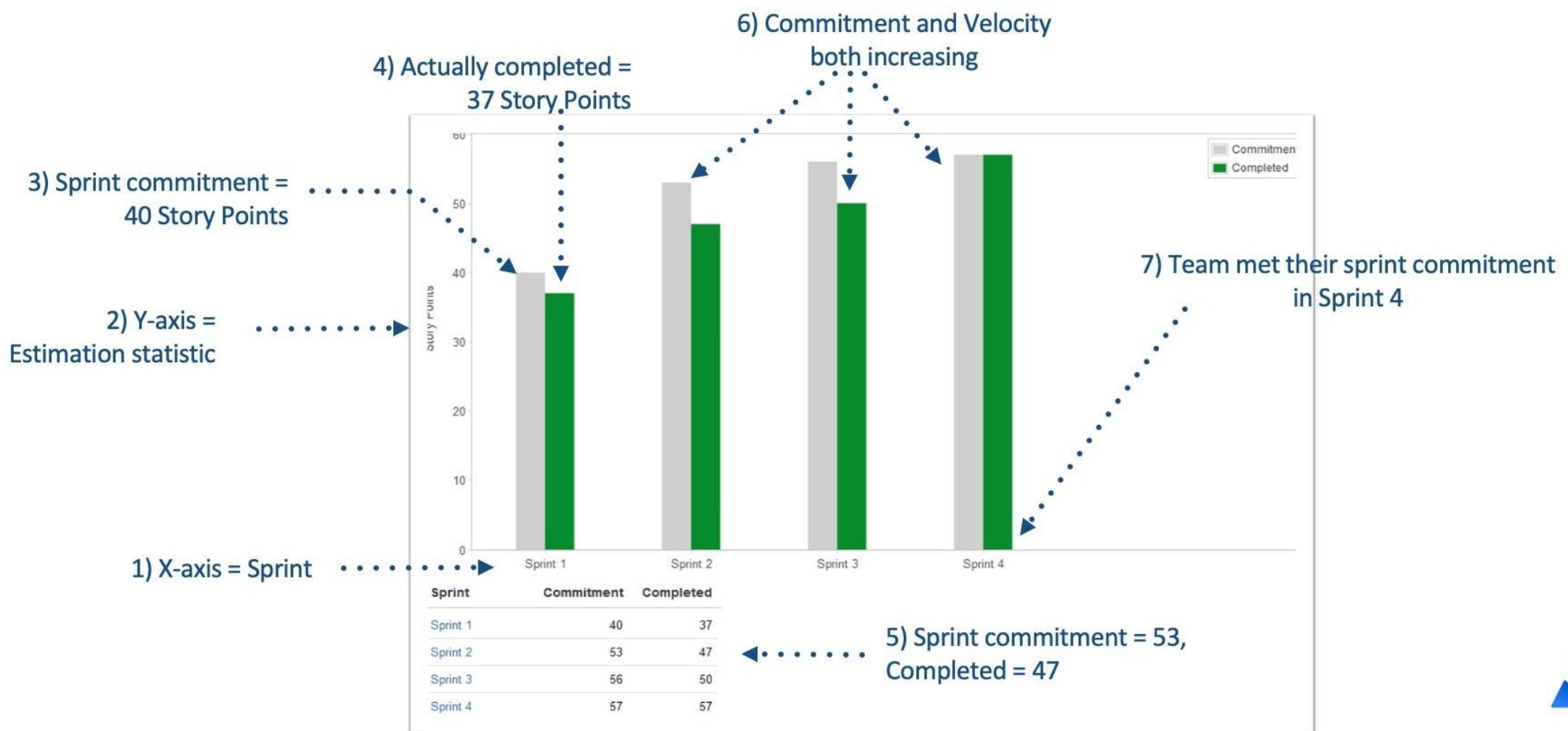
Velocity Chart



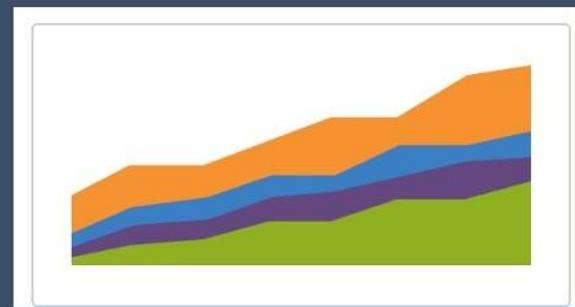
- Shows the value (sum of estimates) delivered in each sprint
- Sprint commitment vs. actual velocity
- Helps predict future work during sprint planning
- Velocity generally improves over time as the team gets better at estimating



Example: Velocity Chart



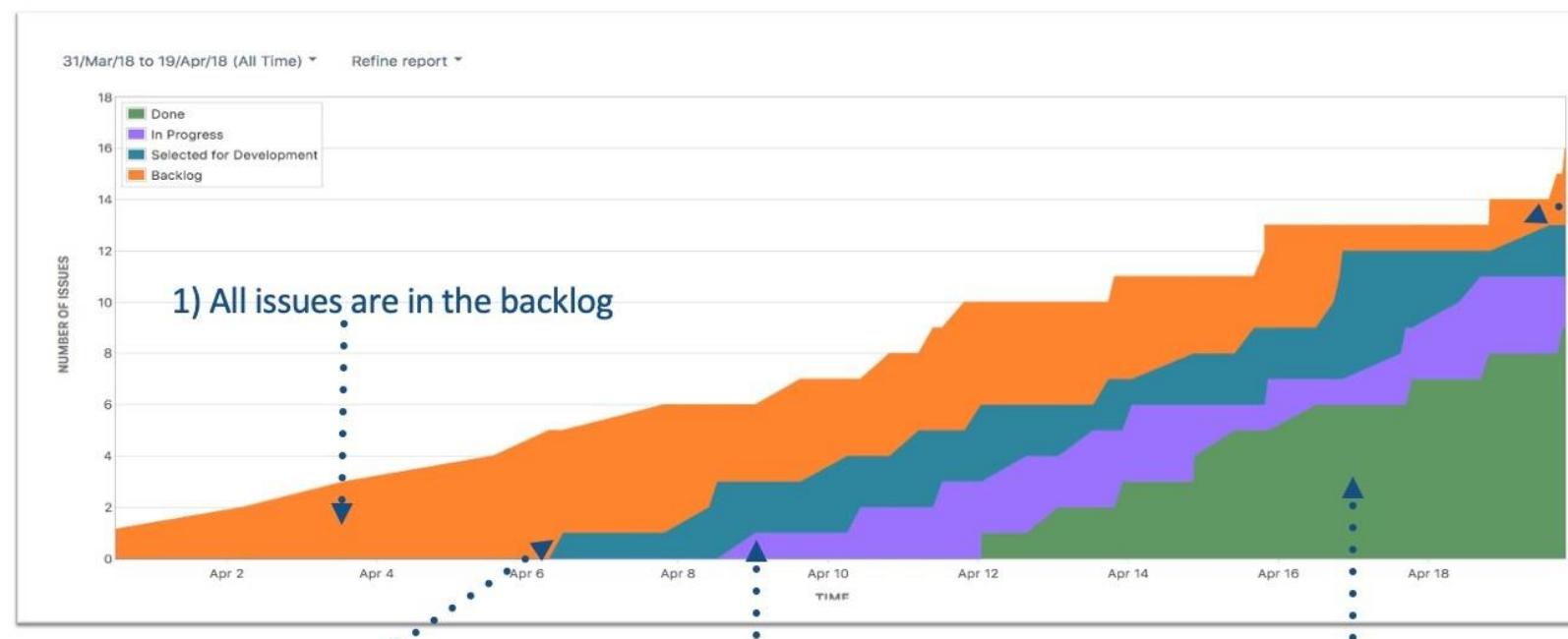
Cumulative Flow Diagram



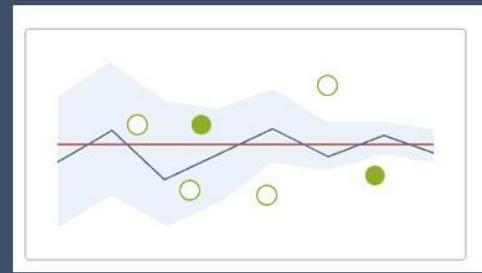
- Area chart that shows the statuses of work items for a board
- X-axis is time; Y-axis are cards (issues)
- Colored area is a status on the board
- Helps identify bottlenecks
- Shows if overall flow is improving and if team is keeping up with the backlog
- Can refine the report with column, swimlane, and quick filter selections



Example: Cumulative Flow Diagram



Control Chart

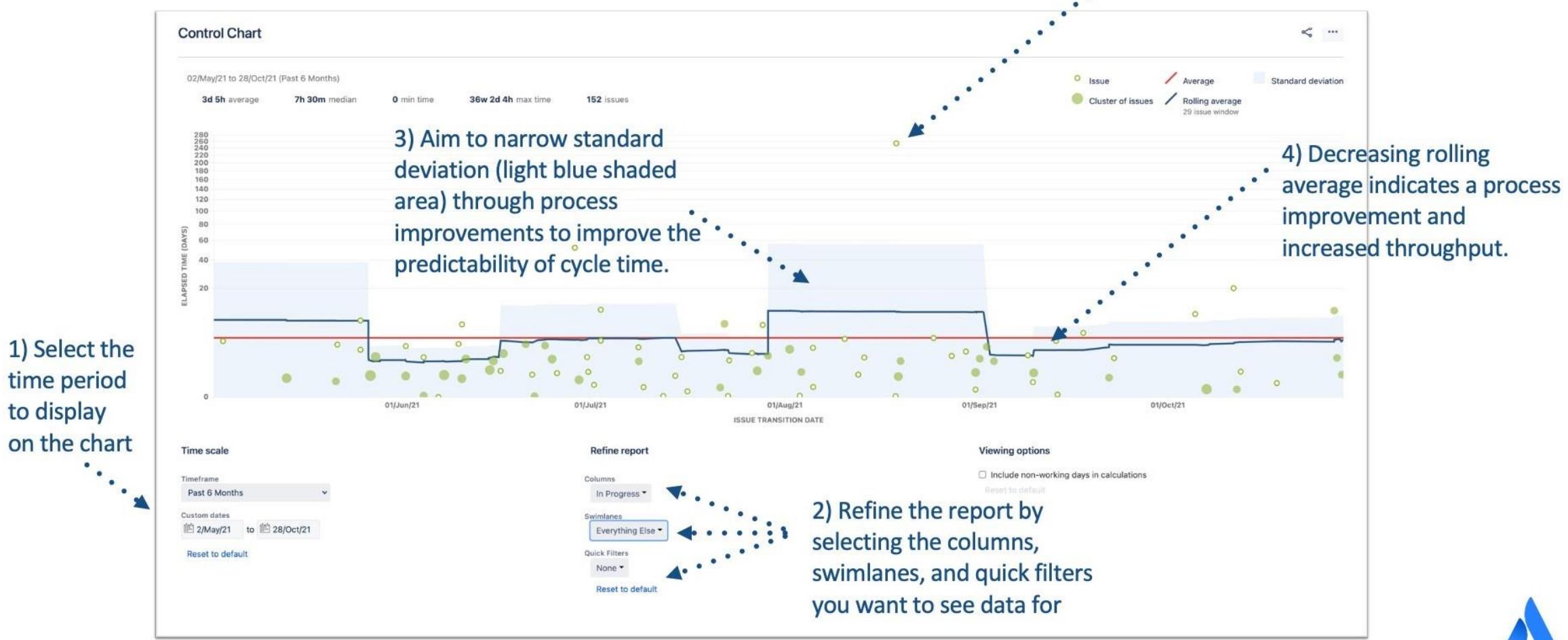


- Shows the Cycle Time (or Lead Time) for the issues on the board
- Shows the average, rolling average, and standard deviation
- Helps determine if data from selected timeframe can be used to predict future performance (the less variance the better)
- Analyze past performance to set targets for your team
- Measure the effect of a process change on your team's productivity



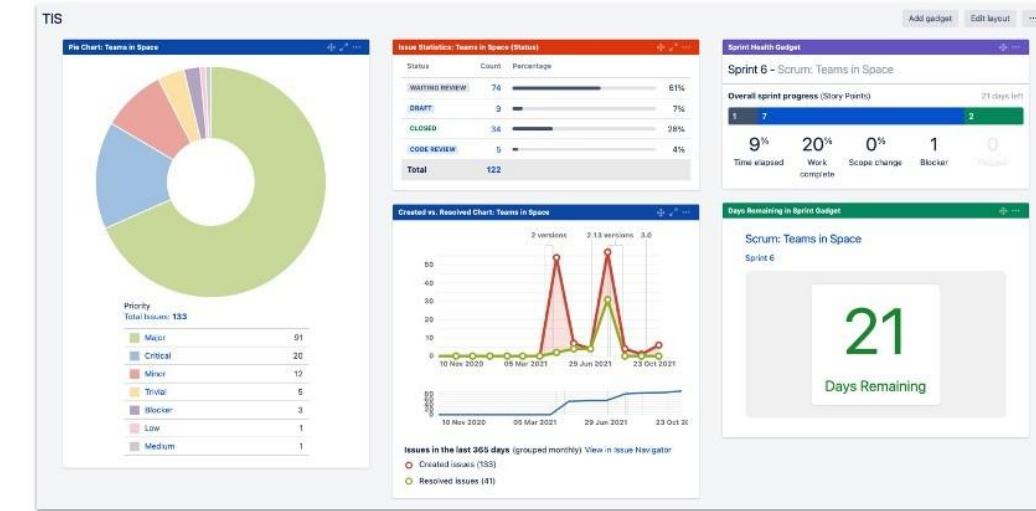
Example: Control Chart

5) This issue is an outlier; it falls far outside the average cycle time. You may wish to investigate the cause to reduce such issues in the future.



Dashboards

- Present a customized view of projects
- Personal and shared dashboards
- Include one or more gadgets
- Customizable layouts
- Many native gadgets available



Agile Gadgets



Days Remaining in Sprint Gadget

Displays days remaining
in a sprint



Agile Gadgets



Days Remaining in Sprint Gadget

Displays days remaining in a sprint



Sprint Burndown Gadget

Sprint burndown chart to track remaining work



Agile Gadgets



Days Remaining in Sprint Gadget

Displays days remaining in a sprint



Sprint Burndown Gadget

Sprint burndown chart to track remaining work



Sprint Health Gadget

Visual snapshot of the health of a sprint



Example: Agile Wallboard Gadget

Displays a Kanban board or the Active Sprints board as a Wallboard gadget

The image displays two separate instances of the Agile Wallboard Gadget, each showing a Kanban-style board with four columns: CANDIDATES, APPROVED ROADMAP, IN PROGRESS, and DONE.

Top Screenshot (Portfolio Management):

- CANDIDATES:** PM-4 Intelligent travel suggestions, PM-6 Multi-destination search, PM-7 Integrate partner travel sites.
- APPROVED ROADMAP:** PM-2 New payment system (highlighted in yellow).
- IN PROGRESS:** PM-1 Team Travel Mobile Apps, PM-3 Performance level-up, PM-5 Fuel-tracker tracking experience.
- DONE:** PM-8 Affiliate marketing program, PM-9 Research blockers.

Bottom Screenshot (Scrum: Teams in Space):

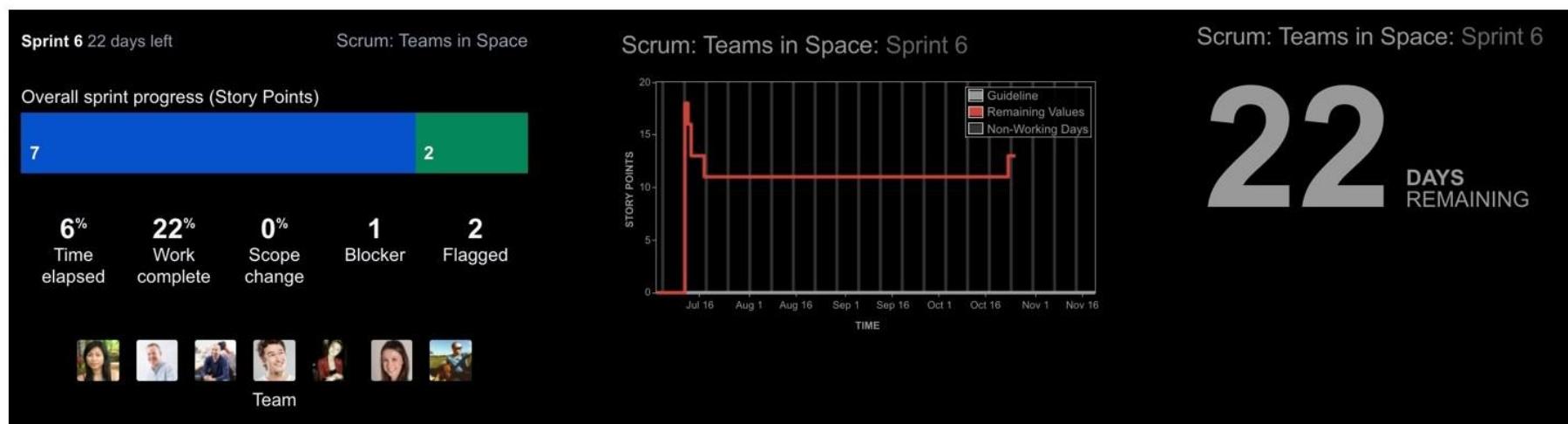
- TO DO:** TIS-48 Homepage footer uses an inline style - should use a class, TIS-28 TIS shopping cart performance fix, TIS-31 Customers reporting shopping cart purchasing issues with the TIS web store.
- IN PROGRESS:** TIS-49 Draft network plan for Mars Office (highlighted in yellow), TIS-17 Engage Saturn's Rings Resort as a preferred provider, TIS-12 Web-store purchasing performance issue fix....
- MAX:** TIS-46 Enable non registered users to sign up with Teams In Space, TIS-18 TIS product search bug, TIS-47 TIS Developer Toolbox does not display by default.
- CODE REVIEW:** TIS-4 Requesting available flights is now taking > 5 seconds, TIS-44 Add pointer to main.css file to instruct users to create valid themes, TIS-43 Engage JetShuttle SpaceWays for short distance space travel.
- DONE:** TIS-32 Create Saturn Summer Sizzle Logo, TIS-33 Summer Saturn Sale.

Blue arrows point from the left towards each screenshot, indicating they are examples of the Agile Wallboard Gadget.



Example: View as Wallboard

View any dashboard as a wallboard



Use Case



The product owner approved five new stories to include in our current sprint. How will this impact our commitment?

And will changing our estimation settings be helpful in the future?

Analyzing reports

We want to determine the impact of scope changes and changes to estimation settings.



Walkthrough

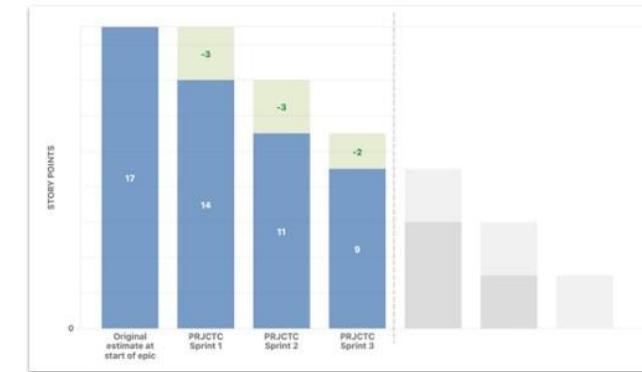


Knowledge Check



Evaluate the Epic Burndown Chart shown.

Select two statements that are **definitely** true. (Choose two.)



- A. The team met each of their sprint commitments.
- B. There were no scope changes during the sprints.
- C. The epic will be done after 3 more sprints.
- D. No estimated issues have been added to the epic.
- E. 3 of the epic's issues were completed in Sprint 1.
- F. Each sprint may have included other issues.

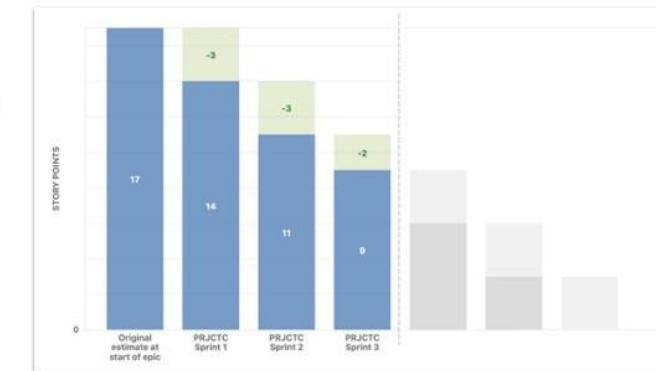


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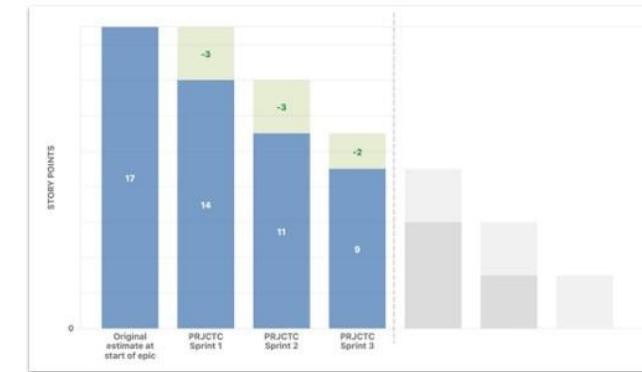


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- E. 3 of the epic's issues were completed in Sprint 1.
- F. Each sprint may have included other issues.

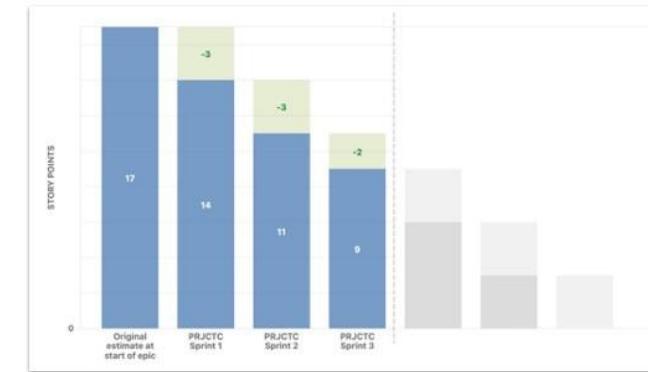


Knowledge Check



Evaluate the Epic Burndown Chart shown.

Select two statements that are **definitely** true. (Choose two.)



- A. The team met each of their sprint commitments.
- B. There were no scope changes during the sprints.
- C. The epic will be done after 3 more sprints.
- D. No estimated issues have been added to the epic.
- E. 3 of the epic's issues were completed in Sprint 1.
- F. Each sprint may have included other issues.



Board Caveats

Tips, tricks, and troubleshooting the
board configuration



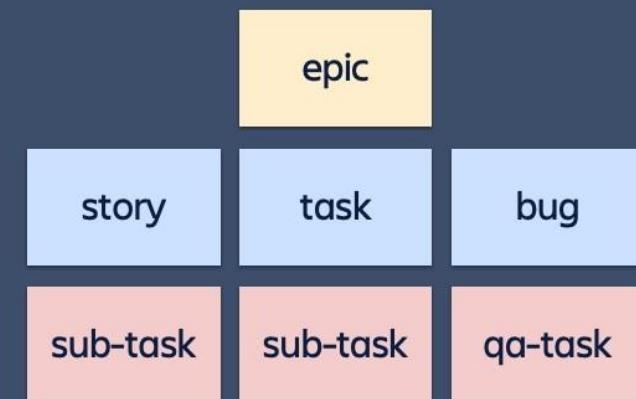
Ranking issues



- Priority is set through the issue detail view
- Many issues have the same Priority
- Ranking is strictly positional
- Use drag-and-drop or right-click
- Requires Schedule Issues and Edit Issues permissions and board ordered by Rank
- Ranking is global

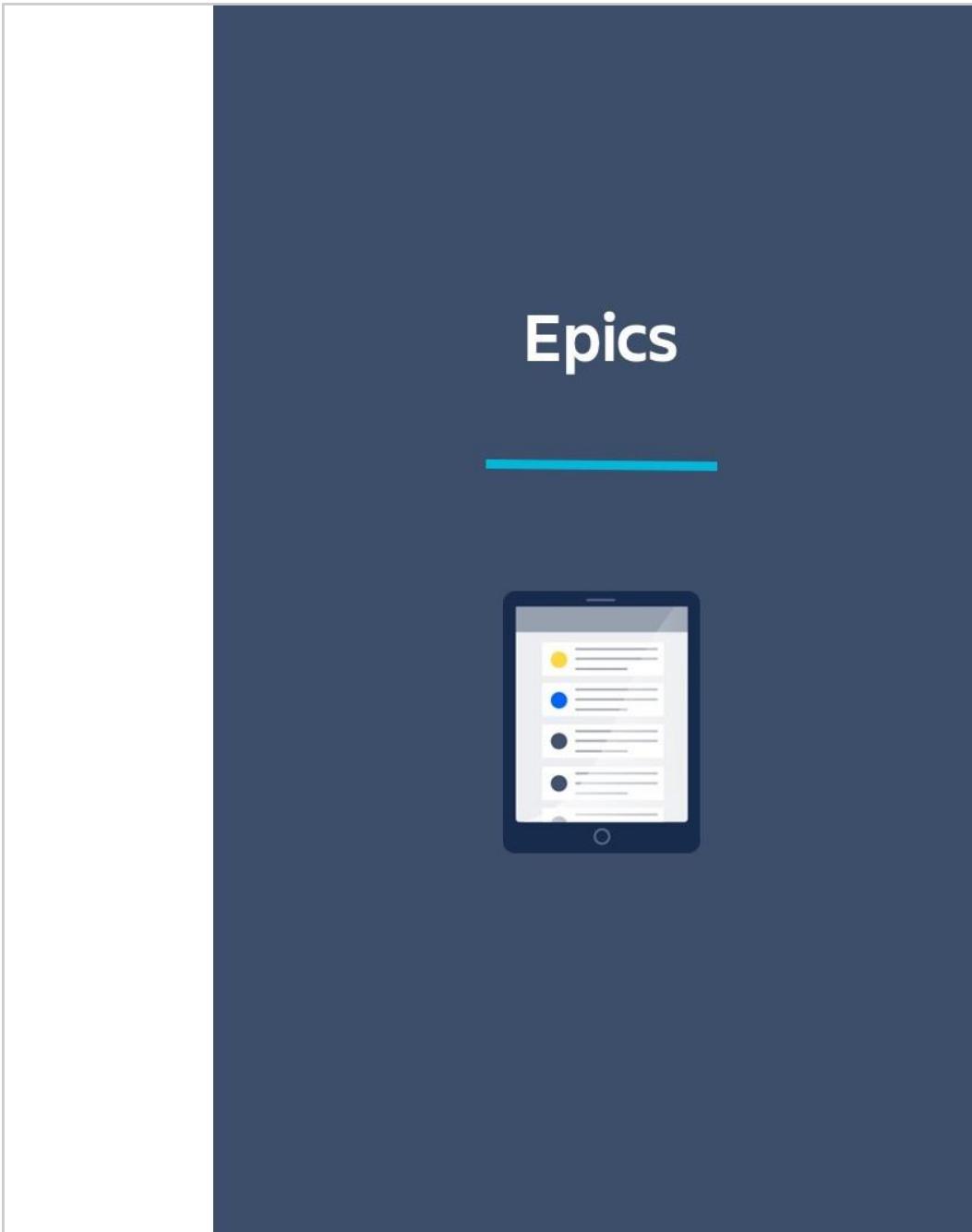


Issue Type Hierarchy



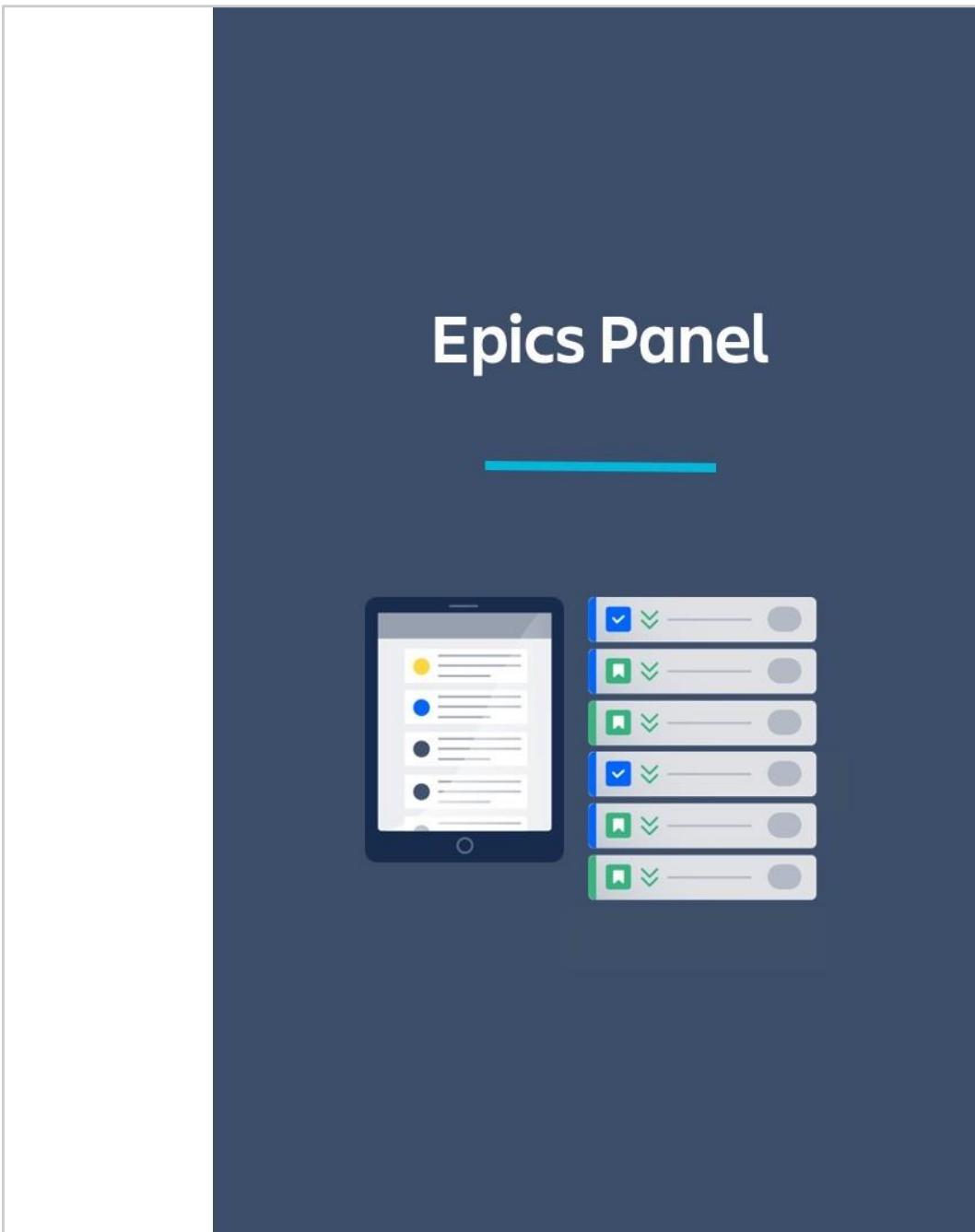
- Standard issue types (Story, Task, Bug)
- Sub-task issue types (sub-task, dev-task)
- Standard issues (can) contain sub-tasks
- Epics are also standard issue types and can have sub-tasks, but also have a bigger scope than the others
- Epics can contain the other standard issue types which can contain subtasks
- This functions like a 3-tiered hierarchy





- Scrum – epics always display in a dedicated Epics Panel in the Backlog
- Kanban – epics display in Kanban board by default but can display in Kanban backlog
- Epics usually span multiple sprints
- Associate issues to epics from different projects, teams, and boards
- Epic Link field links epic to its issues; used for search, filter, sort, and card display



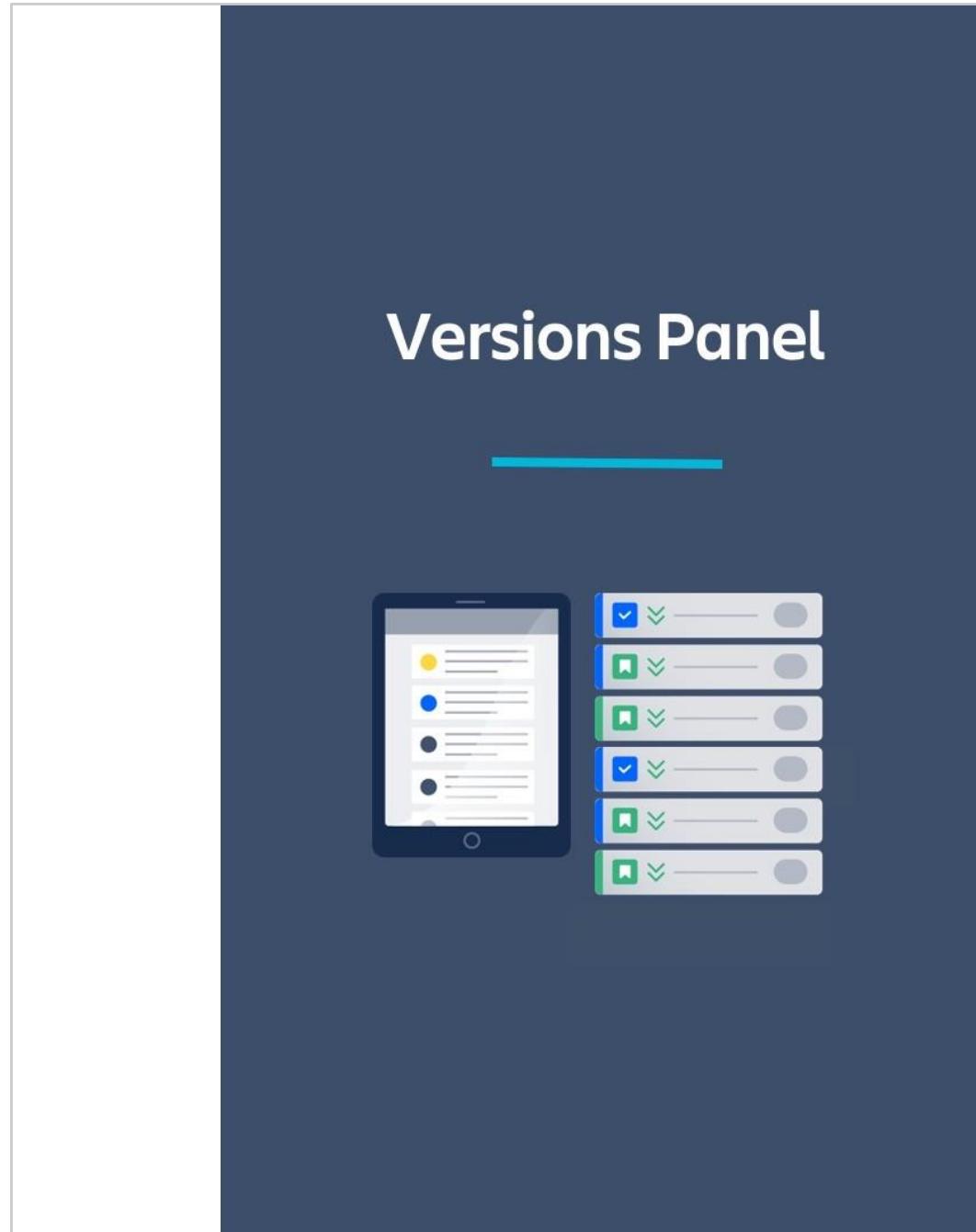


- Helps monitor the status of issues in Epic
- Create issues in Epic
- Drag-and-drop issues into Epic
- Must mark Epic as Done to drop it out of the Epics panel



Transition the Epic to Done status at the same time as you Mark it as Done.





- Scrum Boards Only
- Shows unreleased versions; must release the Version to drop it out of the Versions panel
- Helps monitor the status of versions
- Create issues in version or drag-and-drop
- Associate issues to versions only from their own project, not across projects



Boards with multiple projects



- Saved filter determines which issues/projects are displayed on a board
- Can associate issues from one project with an epic from another, but can only associate issues with versions from their own project
- Board respects all schemes of all projects in the board (workflow, permissions, etc.)



Completing Sprints



- All issues removed from Active Sprints
- Completed issues removed from board but visible in reports
- Incomplete issues moved to next planned sprint or top of backlog
- Parent issue and all sub-tasks must be Done in order to be considered complete



JQL functions



- sprint in **openSprints()**
- sprint in **closedSprints()**
- sprint in **futureSprints()**
- Issues may belong to both complete and incomplete sprint(s)
- functions apply to all teams and projects





**I can't see some issues on my
Scrum board.**

Why?





I can't see some issues on my Scrum board.

Why?

Check the board filter

- Is it returning the expected issues?

Check issue status

- Are the Stories already done?

Check issue type

- Are you looking for sub-tasks in the Backlog?

Check Columns configuration

- Are there unmapped statuses?

Consider other reasons

- Does the project use issue-level security?





I can't see some issues on my
Kanban board.

Why?





I can't see some issues on my Kanban board.

Why?

Check released issues

- Are they Done issues already released from the board?

Check the Kanban sub-filter

- Is it excluding the issues?





I can't rank issues on my board.

Why?





I can't rank issues on my board.

Why?

Check the board filter query

- Is it using Rank?

Check project permissions

- Do you have both Schedule Issues and Edit Issues permissions?
- Did you check all the projects (if there are multiple in the board?)





I don't see all my Epics in the
Epics Panel.

Why?





I don't see all my Epics in the Epics Panel.

Why?

Check the “Epic Status” field

- Is “Epic Status” set to Done? That is what happens when Epics are Marked as Done, and this is what determines if Epics show in the Epics Panel, not their workflow status.

Check the board filter

- Does the JQL query include the epics in question?





My swimlanes are ordered by Epics. But I don't see all the epics. And the ones I do see are not in the right order.

Why?





My swimlanes are ordered by Epics. But I don't see all the epics. And the ones I do see are not in the right order.

Why?

Check the issues in the Epics

- Do the Epics have any issues? Epics with no issues on the board will not be shown as swimlanes.

Check the Epics Panel

- Are the Epics ranked correctly in the Epics Panel? You can drag-and-drop Epics to reorder them. The swimlanes will then respect the order.





**I see versions from other
projects in my Versions Panel.**

**But I can't drag-and-drop
issues into all the versions.**

Why?





I see versions from other projects in my Versions Panel.

But I can't drag-and-drop issues into all the versions.

Why?

Check the board filter

- Does it display issues from multiple projects? All unreleased versions from all the projects on the board will be displayed.

Check the version you're associating

- You can only associate issues to versions in their own project, not across projects.





Some cards are assigned the wrong card color.

Why?





Some cards are assigned the wrong card color.

Why?

Check card color configuration

- Which method is being used to assign colors to your cards?
- Is that what you intended?
- Do the cards have the expected value?

Check JQL

- If you're using queries, is the JQL correct?
- Does it return the expected results when run in Issue Navigator?

Check the order of queries

- Is it correct?





**Some users can't transition
issues on my board.**

Why?





Some users can't transition issues on my board.

Why?

Check project permissions

- Do the users have Transition Issues permission?

Check the workflow

- Could there be workflow conditions in a non-Simplified Workflow?

Check column configuration

- Could some statuses be unmapped?
- Could users be trying to drag-and-drop between two statuses in the same column?



Use Case



I created and configured a board, but:

- No one can see it
- I can't rank issues
- I see Epics that have long been completed
- Issues appear in the wrong swimlanes

Can you help me sort this out?

Troubleshooting issues

We need to evaluate the root cause of several board problems and find the appropriate solutions.



Walkthrough



Knowledge Check



Mike's Scrum board contains issues from two projects: ACME and BREA.

Which action can **definitely** be performed on his board?

- A. drop ACME issues into BREA versions
- B. release ACME issues from the Done column
- C. estimate ACME issues with Story Points and BREA issues with Business Value
- D. create ACME sub-tasks under BREA stories
- E. drop ACME and BREA issues into any board column
- F. mark either ACME and BREA epics as Done



Knowledge Check



Mike's Scrum board contains issues from two projects: ACME and BREA.

Which action can **definitely** be performed on his board?

- A. drop ACME issues into BREA versions
- B. release ACME issues from the Done column
- C. estimate ACME issues with Story Points and BREA issues with Business Value
- D. create ACME sub-tasks under BREA stories
- E. drop ACME and BREA issues into any board column
- F. mark either ACME and BREA epics as Done





Takeaways

- Board type determines the available functionality and reports
- Each board can have its own complex configuration
- The board filter determines the issues displayed on the board – across multiple teams and projects
- Agile reports help monitor work progress, control the burndown, identify bottlenecks, and continuously improve velocity and cycle time.



Congratulations
on completing this course!

