

# Jira Essentials With Agile Mindset



# COURSE OVERVIEW



# What you will learn

- Use lean and agile principles
- Differentiate Kanban and scrum
- Configure Jira to match your team's current process

# To succeed here, you need to have

- No knowledge of agile or Jira Is assumed

# Live teach schedule (1 of 2)

1	Course Overview	20 minutes
2	Agile and Jira Overview	45 minutes
3	Visualize Work Using Project Boards	35 minutes
4	Enrich Issues	40 minutes
5	Kanban Method	30 minutes
6	Lean and Agile Principles	45 minutes
7	Scrum Overview I - Artifacts	15 minutes
8	Scrum Overview II – Roles and Events	35 minutes

# Live teach schedule (2 of 2)

9	Quick Search and Basic Search	25 minutes
10	JQL	20 minutes
11	Filters	15 minutes
12	Epics	20 minutes
13	Dashboards	15 minutes
14	Putting it all Together	15 to 40 minutes*
	Total	~7 hours

# Jira Cloud vs Jira Server/Data Center

A screenshot of the Jira Cloud interface showing a Kanban board. The board has three columns: 'To do', 'In progress', and 'Done'. There are several cards in each column, each with a title like 'add more A', 'add more B', and 'add more C'. The sidebar on the left shows project navigation and settings.

Cloud

A screenshot of the Jira Server/Data Center interface showing a Kanban board. The board has three columns: 'To do', 'In progress', and 'Done'. The cards are identical to the ones in the Cloud version. The sidebar on the left includes additional options like 'Backlog' and 'Report board'.

Server /  
Data Center

# Jira Cloud- classic vs. next-gen projects

The diagram illustrates the comparison between Jira Cloud classic and next-gen projects.

**Classic project:** A card with a blue folder icon and the text "Create project". It contains two sections: "Classic project" (blue background) and "Try a next-gen project" (white background). The "Classic project" section describes it as having "All the power and functionality you expect. Created and managed by your Jira admin." The "Try a next-gen project" section describes it as having "Easy setup and reimagined features. Created and managed by project team members." Dashed arrows point from the "Classic project" and "Try a next-gen project" sections to their respective Jira interfaces.

**Kanban board (Classic interface):** Shows a Kanban board titled "Kanban board" for project "PROJ001". It has four columns: "READY TO START", "READY FOR DEVELOPMENT", "IN PROGRESS", and "DONE". Each column contains three items labeled "add item 1", "add item 2", and "add item 3".

**PROJ board (Next-gen interface):** Shows a Kanban board titled "PROJ board" for project "PROJ001". It has four columns: "Ready", "In Progress", "In Review", and "Done". Each column contains three items labeled "add feature 1", "add feature 2", and "add feature 3".

# Lab 1- Course Overview

- Decide If you want to do the Cloud or Server version of the Lobs
- Login to Ara

# Jira Service Management



# What will you learn?

- Describe agile
- Describe Jira
- Identify how Jira relates to an agile mindset
- Create Jira project
- Create a Jira Issue
- Use a project board
- Identify/Jira user types

# Agile and Jira Overview



# Welcome to the Course!

- Just focus on the basics. No need to be an expert yet.
- Learn the terms first. Important terms will be highlighted like this .
- Your screens may look different. That's okay. The concepts and terms are still the same.
- the course.

# BLUF (Bottom Line Up Front)

**Jira Service Management is a tool  
to help you track your tickets,  
communicate with customers, and  
resolve requests.**

# Power your Service Desk



## IT Support

We can help with any questions regarding your computer.



## Facilities

Is something broken? We can help. Raise a request here.



## Legal

Legal advice, contract reviews and NDAs



## Infrastructure support

Need a cloud service? Raise a request here.



## Accounting and finance

Contact us for financial approvals and general queries.



## Give kudos

Say thanks to your colleagues, send them a kudos here.



## Human resources

We can help with new employee onboarding and general queries.



## Marketing

Contact us for marketing campaigns and content.



## Data engineering

Ask us for anything data or analytics related.



## Research & Insights

We manage all outgoing customer research and VOC.



## Global Tax

Home to all your Tax needs.



## Security

Contact us for any security reviews or breaches.

# Why use a Service Desk Tool?

- **It's fast:** 40% faster task resolution than other service desk providers.
- **It's efficient:** Easily organize, prioritize, and assign tickets.
- **It's easy to use:** Clean, intuitive interface that's simple for both customers and agents.
- **It's affordable:** 80% lower cost than other service desk tools, including a free plan.

# Avatars



**AGENT**  
(Probably you)



**CUSTOMER**



**PROJECT  
ADMINISTRATOR**



**COLLABORATOR**

# Issues

An **issue** is an individual unit of work.

The screenshot shows the Jira Service Management interface for the 'IT Support' project. The left sidebar displays navigation links like 'All tickets', 'Starred', and 'Team Priority'. The main area is titled 'All open tickets' and lists several customer requests. One ticket, 'Get IT help' (ITS-36), is highlighted with a yellow border. The table columns include Customer Request, Key, Summary, Reporter, Assignee, Status, Created, and Time to re... . The status for ITS-36 is 'IN PROGRESS'.

Customer Request	Key	Summary	Reporter	Assignee	Status	Created	Time to re...
Get IT help	ITS-36	My VPN is not connecting to the network	Melissa Brimer	Melissa Brimer	IN PROGRESS	02/Dec/21	7h 53m
Fix an account problem	ITS-37	My password expired and I am locked out of my email.	Charlie Teamerson	Unassigned	WAITING FOR SUPPORT	02/Dec/21	7h 54m
Get IT help	ITS-38	Computer won't connect to wifi	Ryan Lee	Unassigned	WAITING FOR SUPPORT	02/Dec/21	7h 55m
Request new software	ITS-39	Need software license for Adobe Creative Cloud	Alana Grant	Andrew DeBell	WAITING FOR SUPPORT	02/Dec/21	7h 55m
Fix an account problem	ITS-40	Password expired and need help resetting it	Charlie Teamerson	Andrew DeBell	IN PROGRESS	02/Dec/21	7h 56m
Get IT help	ITS-41	My VPN is not connecting to the network	Ryan Lee	Andrew DeBell	IN PROGRESS	02/Dec/21	7h 56m
Get IT help	ITS-42	Laptop keeps restarting unexpectedly	Alana Grant	Melissa Brimer	IN PROGRESS	02/Dec/21	7h 57m

# Interacting with Issues

# Requests

**Agents see this**  
(called an issue in their view)

The screenshot shows a service management application with a sidebar on the left containing navigation links like 'Dashboard', 'Issues', 'Projects', 'Trans.', 'Entitlements', 'People', 'Helpdesk', 'Audit', and 'Devices'. The main area displays an issue card for 'Laptop keeps restarting unexpectedly'. The card includes sections for 'Details' (Status: Open, Assignee: Anna Smith, Priority: 24 hr), 'Actions' (Add note, Add file, Add attachment, Add to backlog, Under review), and 'Comments' (Add comment). A 'Recent' section lists 'Laptop keeps restarting unexpectedly' (Anna Smith, 24 hr ago) and 'Laptop keeps restarting unexpectedly' (Anna Smith, 24 hr ago). At the bottom, there are tabs for 'Issues' (selected), 'Trans.', 'Entitlements', 'People', 'Helpdesk', and 'Audit'.

**Customers see this**  
(called a request in their view)

The screenshot shows a customer support application with a sidebar on the left containing navigation links like 'Dashboard', 'Issues', 'Entitlements', 'People', 'Helpdesk', 'Audit', and 'Devices'. The main area displays a request card for 'Laptop keeps restarting unexpectedly'. The card includes sections for 'Details' (Status: Pending, Assignee: Anna Smith, Priority: 24 hr), 'Actions' (Add note, Add file, Add attachment, Add to backlog, Under review), and 'Comments' (Add comment). A 'Recent' section lists 'Laptop keeps restarting unexpectedly' (Anna Smith, 24 hr ago) and 'Laptop keeps restarting unexpectedly' (Anna Smith, 24 hr ago). At the bottom, there are tabs for 'Issues' (selected), 'Trans.', 'Entitlements', 'People', 'Helpdesk', and 'Audit'.

# Issues and Requests

An **IT Support team** might have an issue like this:

My laptop keeps restarting unexpectedly



GD-1



A **Human Resources team** might have an issue like this:

Set up onboarding kit for new manager



GD-24



A **Legal team** might have an issue like this:

Review MSA contract and provide feedback



GD-2



W

# Service Project and Queue

The screenshot shows the Jira Service Management interface for the 'IT Support' service project. The left sidebar is a navigation menu with several items highlighted by yellow boxes and arrows:

- IT Support** (Service project)
- Queues**
- Service requests**
- Incidents**
- Problems**
- Changes**

The main area displays a table titled 'Open service requests'. The columns are: Key, Summary, Reporter, Assignee, Status, Created, and Time to resol... (with a dropdown arrow). One row is selected, highlighting the entry for 'ITS-42' with the summary 'Laptop keeps restarting unexpectedly'. The status for this request is 'IN PROGRESS', assigned to 'Melissa Brimer', and it was created on '02/Dec/21'.

Key	Summary	Reporter	Assignee	Status	Created	Time to resol...
ITS-42	Laptop keeps restarting unexpectedly	Alana Grant	Melissa Brimer	IN PROGRESS	02/Dec/21	7h 57m II
ITS-43	My password expired and I am locked out of my email.	Charlie Townsend	Melissa Brimer	In Progress	02/Dec/21	7h 58m 30s
ITS-44	Laptop keeps restarting unexpectedly	Alana Grant	Melissa Brimer	In Progress	02/Dec/21	7h 58m 30s
ITS-45	My WiFi is not connecting to the network	Ryan Lee	Andrew Dallas	In Progress	02/Dec/21	7h 58m 30s
ITS-46	Processor overheat and need help removing it	Charlie Townsend	Andrew Dallas	In Progress	02/Dec/21	7h 58m 30s
ITS-47	Need software license for Adobe Creative Cloud	Alana Grant	Andrew Dallas	In Progress	02/Dec/21	7h 58m 30s
ITS-48	Computer won't connect to WiFi	Ryan Lee	Unassigned	In Progress	02/Dec/21	7h 58m 30s
ITS-49	My password expired and I am locked out of my email.	Charlie Townsend	Unassigned	In Progress	02/Dec/21	7h 58m 30s
ITS-50	My WiFi is not connecting to the network	Melissa Brimer	Melissa Brimer	In Progress	02/Dec/21	7h 58m 30s

# Make sure you are on the Right Project

Jira Service Management   Your work ▾ Projects ▾ Filters ▾ Dashboards ▾ People ▾ Insight ▾ Apps ▾ Create   Search 3

IT Support  
Service project

Queues

- Service requests
- Incidents
- Problems
- Changes

OPERATIONS

- Change calendar
- Services
- Alerts
- On-call

KNOWLEDGE

- Knowledge base
- Reports

CHANNELS & PEOPLE

- Channels
- Customers

Projects / IT Support / All tickets

### All open tickets

Reset sorting

<input type="checkbox"/>	Customer Requ...	Key	Summary	Reporter	Assignee	Status	Created ↑	Time to resol...
<input type="checkbox"/>	Fix an account problem	ITS-47	My password expired and I am locked out of my email.	Charlie Teamerson	Unassigned	WAITING FOR SUPPORT	03/Dec/21	8h II
<input type="checkbox"/>	Get IT help	ITS-48	Computer won't connect to wifi	Ryan Lee	Unassigned	WAITING FOR SUPPORT	03/Dec/21	8h II
<input type="checkbox"/>	Request new software	ITS-49	Need software license for Adobe Creative Cloud	Alana Grant	Andrew De...	WAITING FOR SUPPORT	03/Dec/21	8h II
<input type="checkbox"/>	Fix an account problem	ITS-50	Password expired and need help resetting it	Charlie Teamerson	Andrew De...	IN PROGRESS	03/Dec/21	8h II
<input type="checkbox"/>	Get IT help	ITS-51	My VPN is not connecting to the network	Ryan Lee	Melissa Bri...	IN PROGRESS	03/Dec/21	8h II
<input type="checkbox"/>	Get IT help	ITS-52	Laptop keeps restarting unexpectedly	Alana Grant	Melissa Bri...	IN PROGRESS	03/Dec/21	8h II
<input type="checkbox"/>	Fix an account problem	ITS-53	My password expired and I am locked out of my email	Charlie Teamerson	Sumedh S	IN PROGRESS	03/Dec/21	8h II

# Customers POV

# Queues

# Filtering Issues by Types

The screenshot shows the Jira Service Management interface. On the left, there's a sidebar with a search bar and four filter options: Service requests (selected), Incidents, Problems, and Changes. A yellow box highlights the 'Service requests' option. An arrow points from the text 'Filter issues by request type' to this highlighted box. The main area displays a table of 'Open service requests' with columns: Key, Summary, Reporter, Assignee, Status, Created, and Time to Res.. There are six rows of data, each representing a different service request.

Key	Summary	Reporter	Assignee	Status	Created	Time to Res.
ITSM-101	My password expired and I am locked out of my email	Charlie Isensemen	Unassigned	In Progress	2024-02-27	4h 30m
ITSM-102	My phone is not connecting to the network	Ryan Lee	Unassigned	In Progress	2024-02-27	4h 30m
ITSM-103	My phone is not connecting to the network	Ryan Lee	Unassigned	In Progress	2024-02-27	4h 30m
ITSM-104	Password expired and need help resetting it	Charlie Isensemen	Andrew Delfi	In Progress	2024-02-27	4h 30m
ITSM-105	Need software license for Adobe Creative Cloud	Alice Green	Andrew Delfi	Not Started (Summary)	2024-02-27	4h 30m
ITSM-106	Computer won't connect to wifi	Ryan Lee	Unassigned	Not Started (Summary)	2024-02-27	4h 30m
ITSM-107	My password expired and I am locked out of my email	Charlie Isensemen	Unassigned	Not Started (Summary)	2024-02-27	4h 30m



# Customer Requests

# The Queue is Populated

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# Who gets the ticket?

# Make sure the status is updated!

# Because this is what the customer sees

The screenshot shows a Jira Service Management ticket interface. At the top, a purple banner says "We've collapsed your details view to help you focus on the work that matters most." Below this, the ticket details are visible:

- Help Center / IT Support / ITS-45**
- My VPN is not connecting to the network**
- Andrew DeBell** raised this on 10/Dec/21 7:24 PM. [Show details](#)
- Status**: IN PROGRESS
- Activity**:
  - Melissa Brimer Today 9:15 PM: We're starting work on this request now!
  - Automatic response Today 9:15 PM: Your request status has changed to In Progress.
- Request type**: Get IT help
- Shared with**: Andrew DeBell (Creator), [Share](#)

At the bottom, it says "Powered by Jira Service Management".

# Welcome to the Course!

# Topics

- Agile Overview
- Jira Overview
- Projects, issues and boards



# What is Agile?

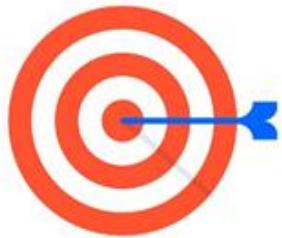
A way of getting things done.

An empirical approach to project management

Continuously develop the plan, process and product

A mindset

# Why Agile?



## Effectiveness

Perform better than traditional projects



## Empower the Team

Leverage team knowledge and increase job satisfaction



## Manage Complexity

Simple project management approach to increasing complexity

# What is an agile mindset?

- A growth/continuous improvement way of working
- Allowing the data to change your approach
- Uses agile techniques to accomplish work



# What is an agile mindset?

- For an agile team to perform its best, all team members must have an agile mindset



# The agile coach



**BROWSE TOPICS**

- [Agile manifesto](#)
- [Scrum](#)
- [Kanban](#)
- [Agile project management](#)
- [Product Management](#)
- [Agile at scale](#)
- [Software development](#)

## What is Agile?

Agile is an iterative approach to project management and software development that helps teams deliver value to their customers faster and with fewer headaches. Instead of betting everything on a "big bang" launch, an agile team delivers work in small, but consumable, increments. Requirements, plans, and results are evaluated continuously so teams have a natural mechanism for responding to change quickly.

# Topics

- Agile Overview
- Jira Overview
- Projects, issues and boards



# What is Jira

- A tool used to help teams perform, visualize and manage work
- Models the team's current processes/workflows

# Why Jira?

- Leverage project management technology, allowing teams to focus on their work
- Facilitates planning, prioritizing, organizing and completing work
- Visualizes work using project boards, reports and dashboards
- Facilitates team communication

# How does Jira relate to an agile mindset?

- Jira is a tool that teams can use to model and execute their agile processes

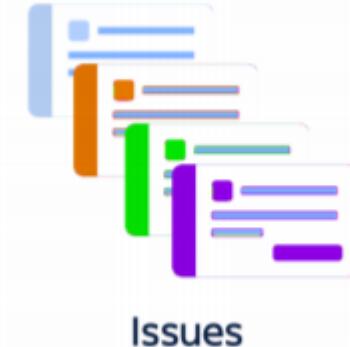
# Topics

- Agile Overview
- Jira Overview
- Projects, issues and boards



# What is a Jira issue?

- An item of work (work item) identified by the team
- An issue has an associated type (for example, story, task, bug)
- The details of the issues are known as fields



# What is a Jira project?

- A collection of related issues
- A team “to do” List
- Can have a fixed end date or be an ongoing project
- A project has an associated type (for example, Kanban, scrum)



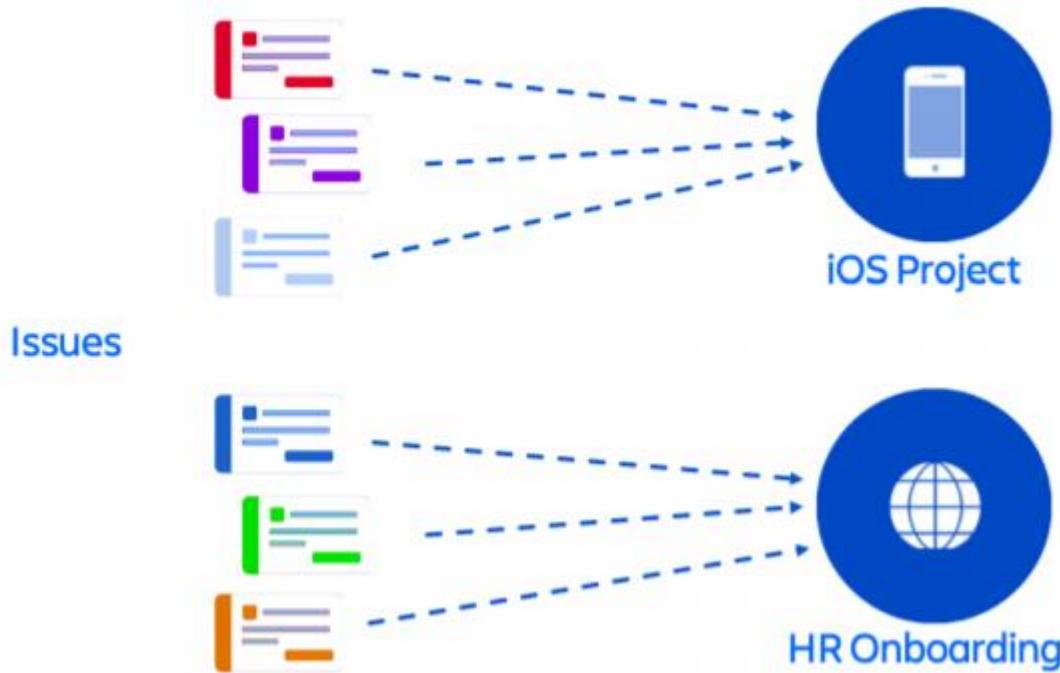
# Issue Key



Jira automatically assigns a unique *issue key* to created issues

`<issue_key> = <project_key>-<issue_number>`

# Each issue belongs to one project



# What is a project board?

- A two-dimensional “to do” List
- A way to visualize issues
- A visualization of the team's process/workflow
- Displays Issues as cards



# Jira User Types



Jira Administrator

..... Configures the Jira instance  
for all users



Jira Project  
Administrator

..... Can configure a Jira project to  
match the team's process



Team Member

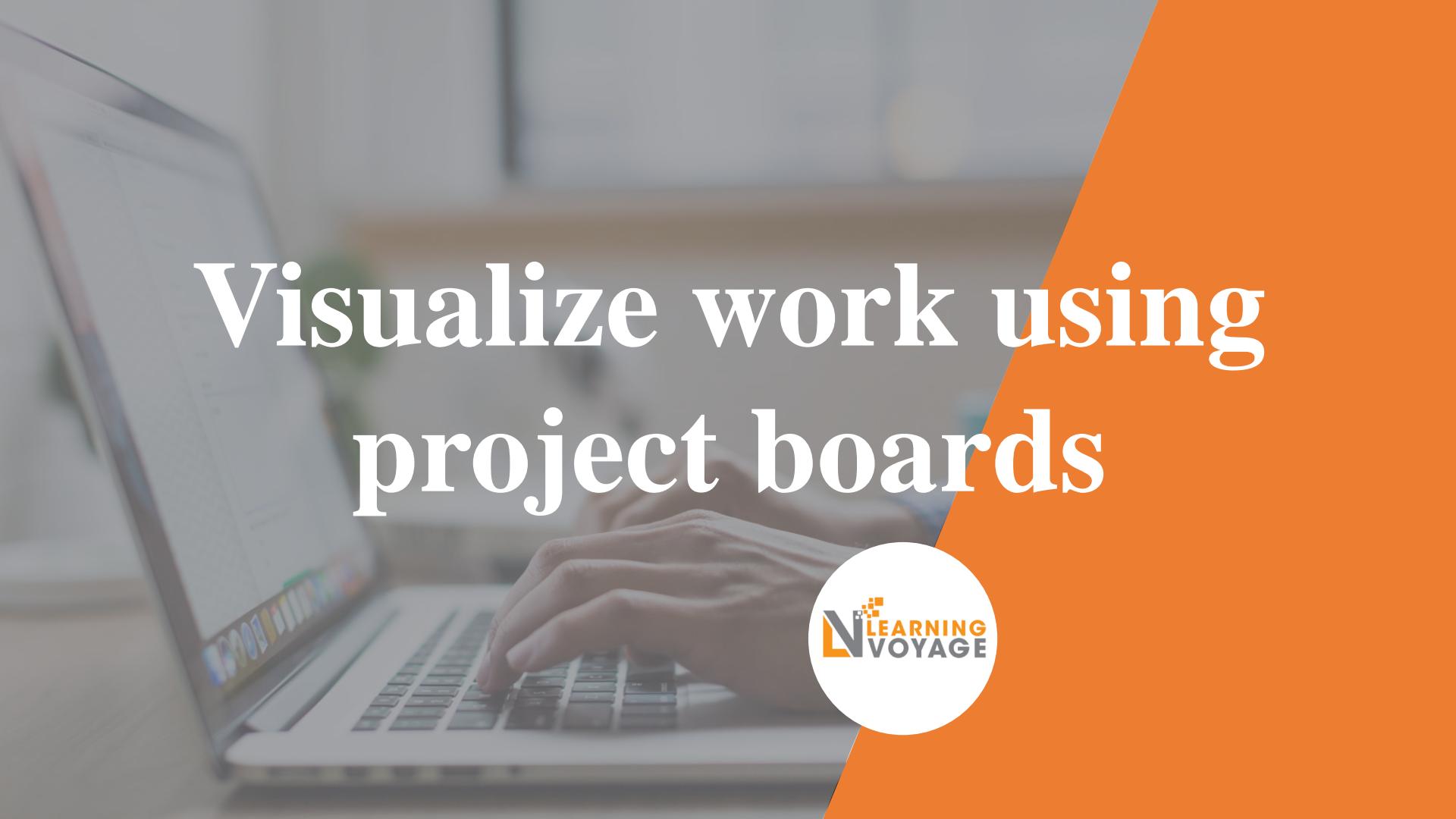
..... Works on projects

# Takeaways

- Agile Is a way of working
- Jira Is a tool teams use to manage and visualize work
- Jira can be configured to match a team's continuously improving processes
- A Jira Issue is on Item of work Identified by the team
- Project boards visualize a team's work
- The main types of Jira users are Jira administrators, Jira project administrators and team members

# Lab 2 -Agile and Jira Overview

- Create a project
- Create issues



# Visualize work using project boards



# What will you learn?

- Describe the Importance of visualizing work
- Describe common workflows
- Differentiate Jira boards and workflows
- Describe the purpose of an issue's status field
- Configure board columns

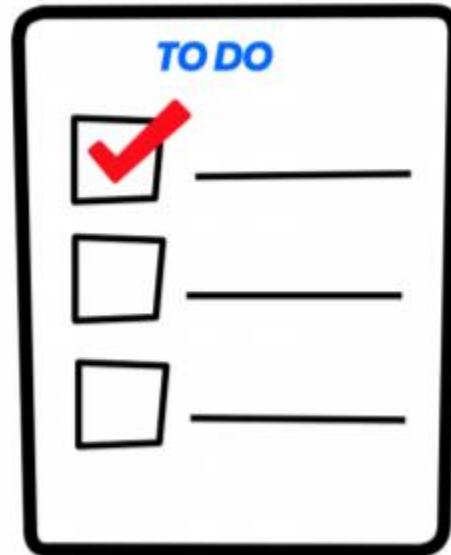
# Topics

- Visualizing work
- Workflows
- Jira Boards and workflows
- Configuring board columns



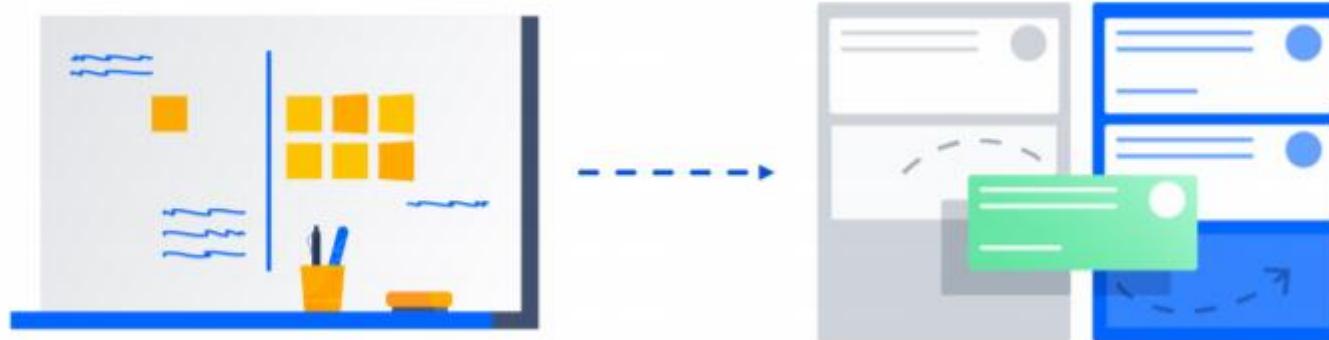
# Visualizing work: a “to do” list

- Reminds you
- Focuses you
- Sets priorities
- Tracks progress



# Visualizing work: a board

- A principle of agile projects is to "visualize work"
- A board is an agile tool used to visualize and manage work



# Visualizing work: reports and dashboards



Reports



Dashboards

# Why Visualize Work?

- To easily **see** the work of the project
  - Allows anyone to see the true current state of the project
  - Organizes and focuses the team
- To **manage** things
  - Easy to add and prioritize the work of the project
  - Easy to update work items
- To **improve** the team's way of working
  - Can visually identify problems



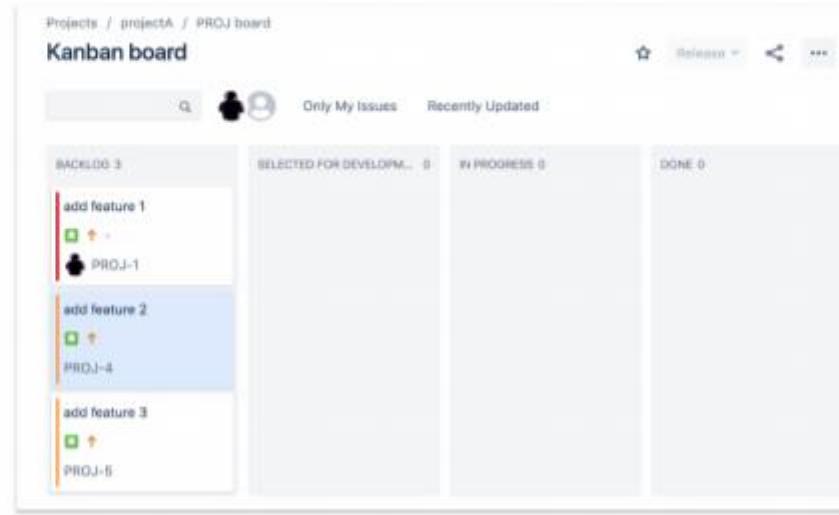
# Topics

- Visualizing work
- **Workflows**
- Jira Boards and workflows
- Configuring board columns

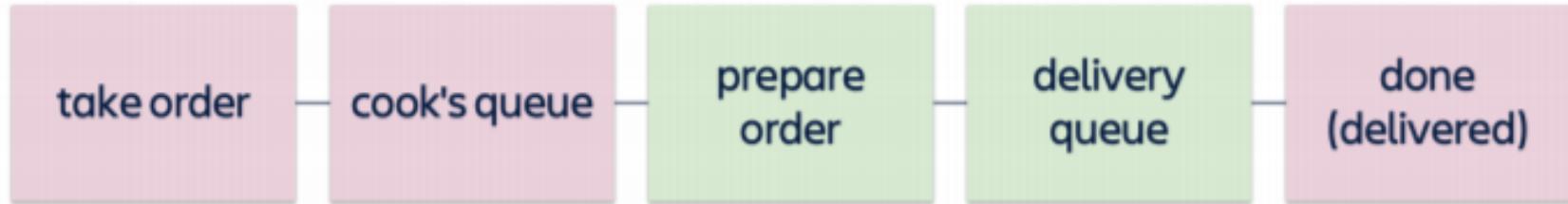


# Workflows

- The set of columns of a board represent a **workflow** (or process) for completing the work of an issue
- Workflows are broken down into **statuses** (or steps)

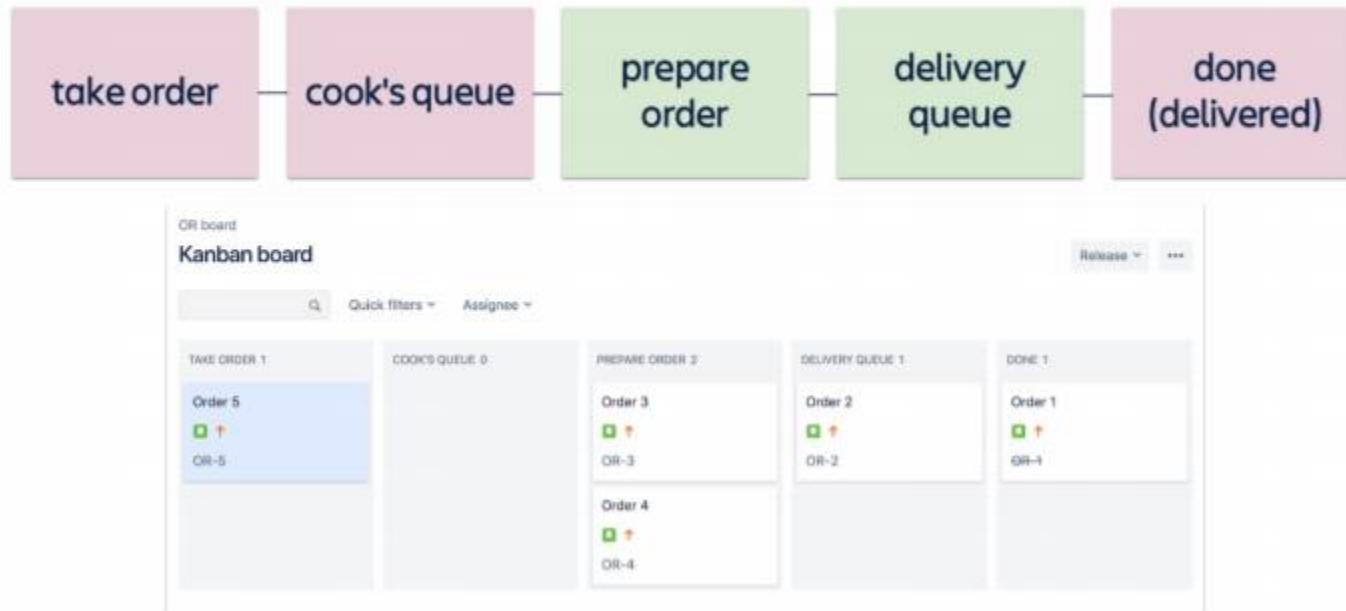


# Example workflow: restaurant order and delivery



# Boards VS Workflows

- A team works using a board
- The board's structure is defined by an underlying workflow



# Topics

- Visualizing work
- Workflows
- **Jira Boards and workflows**
- Configuring board columns



# How are boards created?

- Automatically
- Create additional boards at any time

The screenshot shows a Jira Kanban board for projectA / PROJ board. The board has three columns: BACKLOG (3 items), SELECTED FOR DEVELOPME... (0 items), and IN PROGRESS (0 items). A red arrow points from the top right towards a context menu that is open on the right side of the header. The menu options are: Board settings (selected), Create board, Hide menus, Show detail view, Open issues in sidebar, and Expand all swimlanes.

Projects / projectA / PROJ board

## Kanban board

Only My Issues   Recently Updated

BACKLOG 3   SELECTED FOR DEVELOPME... 0   IN PROGRESS 0

add item 1  
PROJ-1

Board settings

Create board

Hide menus

Show detail view

Open issues in sidebar

Expand all swimlanes

# An issue's status field

- Every project automatically has one or more associated workflows
- The status field for each issue must be set to a workflow's status

The screenshot shows a Jira interface for creating a new issue. At the top left, there is a checkbox labeled "PROJ-1". On the right side, there are icons for "Give feedback", a blue circular button with the number "1", and a share icon. Below these, the title "add item 1" is displayed. To the right of the title is a red arrow pointing towards a dropdown menu. The dropdown menu is titled "Backlog" and contains three items: "SELECTED FOR DEVELOPMENT" (highlighted in blue), "IN PROGRESS", and "DONE".

PROJ-1

Give feedback 1

add item 1

Backlog

SELECTED FOR DEVELOPMENT

IN PROGRESS

DONE

# Boards and status

- Boards are a view of issues arranged by status
- Moving an issue changes the value of its status field

Projects / projectA / PROJ board

### Kanban board

Only My Issues Recently Updated

BACKLOG 3	SELECTED FOR DEVELOPMENT 0	IN PROGRESS 0	DONE 0
add item 1 PROJ-1			We're only showing recently modified issues. Q Looking for an older issue?
add item 2 PROJ-2			
add item 3 PROJ-3			

# Topics

- Visualizing work
- Workflows
- Jira Boards and workflows
- Configuring board columns



# Adding a board column

Projects / projectA / PROJ board

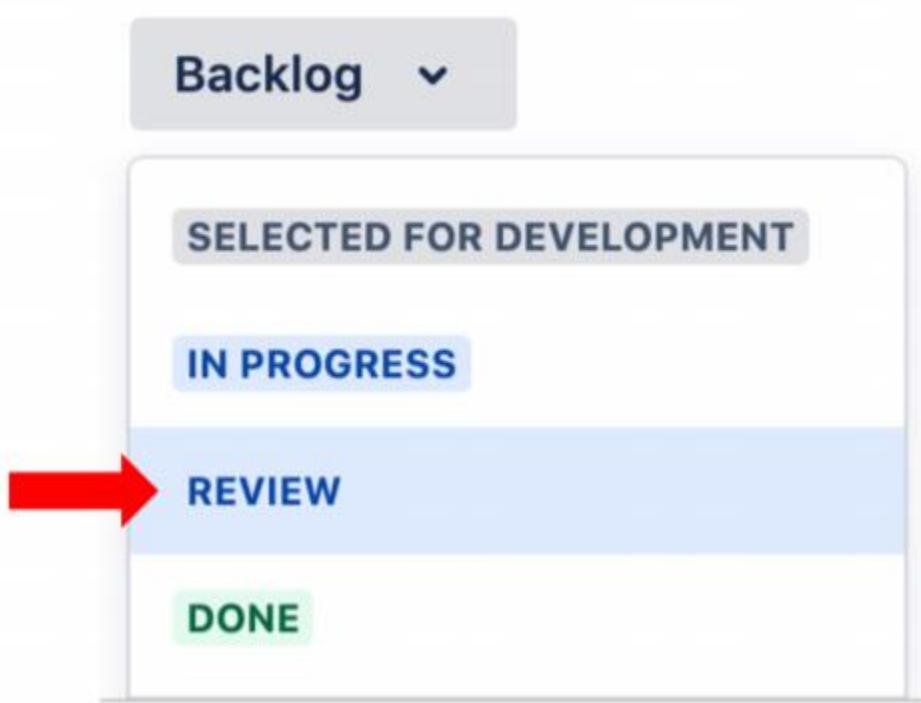
## Kanban board

Release   

  Only My Issues Recently Updated

BACKLOG 3	SELECTED FOR DEVE... 0	IN PROGRESS 0	REVIEW 0	DONE 0
<p>add item 1</p> <p> </p> <p>PROJ-1</p>				<p>We're only showing recently modified issues.</p> <p> Looking for an older issue?</p>
<p>add item 2</p> <p> </p> <p>PROJ-2</p>				
<p>add item 3</p> <p> </p> <p>PROJ-3</p>				

# Viewing the new status



# Takeaways

- A board is a two-dimensional way to visualize the work of a team
- In Jira, a workflow is often represented using a board
- Board columns usually map to the status field of Issues
- Board columns can be added or removed to match the team's desired process

# Lab 3 - Visualize Work Using Boards

- Move Issues through a workflow
- Assign an Issue
- Add a Review column bathe board
- Explore the difference between Jira project administrators and standard users

# Enrich Issues



# What will you learn?

- Identify ways that Issues can be enriched with Information
- Describe the benefits of using Issue types
- Describe subtasks
- Use Labels to organize Issues
- Introduce Integration with version control and build systems

# Topics

- Enrich issues
- Issue types
- Labels
- Developer integration overview



# Issues contain work-related information

## Issue

Summary: Check network jacks

Description: Each network jack in the new building needs to be checked for signal strength.

Type:  Task

Assignee:



Helena

Priority:  Critical

Status:  IN PROGRESS

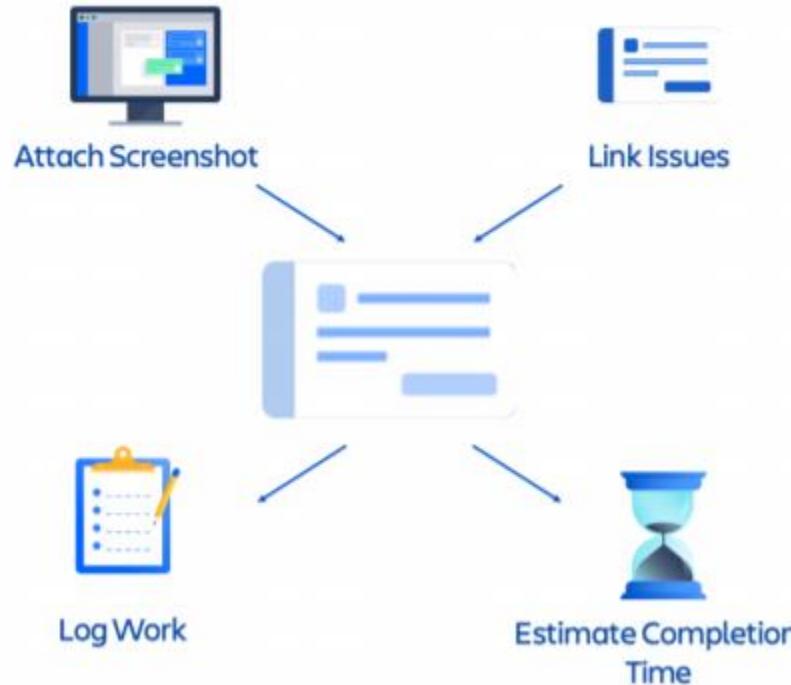
Reporter:



Oliver

Comments: Helena needs the network diagram from IT.

# Enriching issues



# Mention team members



# Topics

- Enrich issues
- Issue types
- Labels
- Developer integration overview



# The issue type field

- **Epic** - a big issue that can contain issues
- **Story** - requirement from the user's perspective
- **Task** - team work item
- **Bug** - a flaw that needs to be fixed
- **Subtask** - a child of another issue

Create issue

Project\*

projectA (PROA)

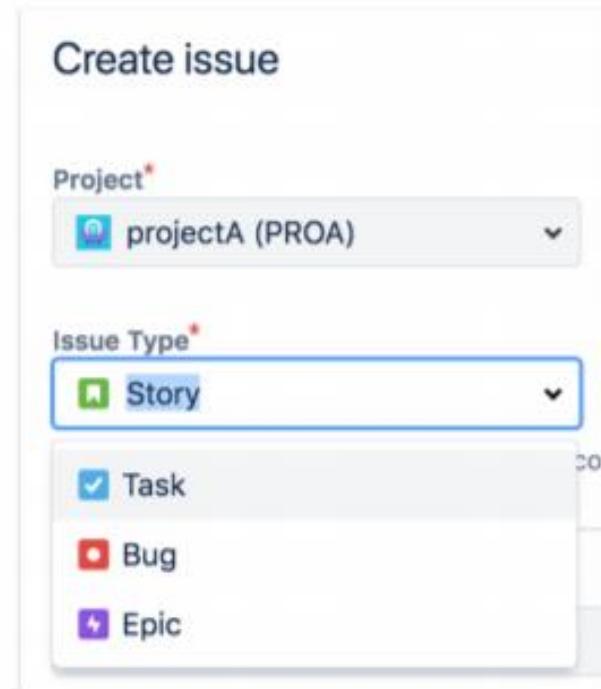
Issue Type\*

Story

Task

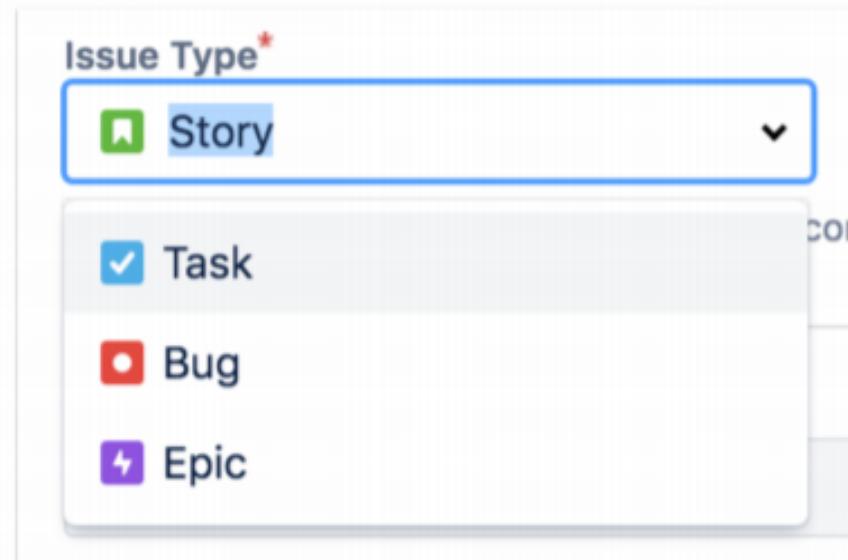
Bug

Epic

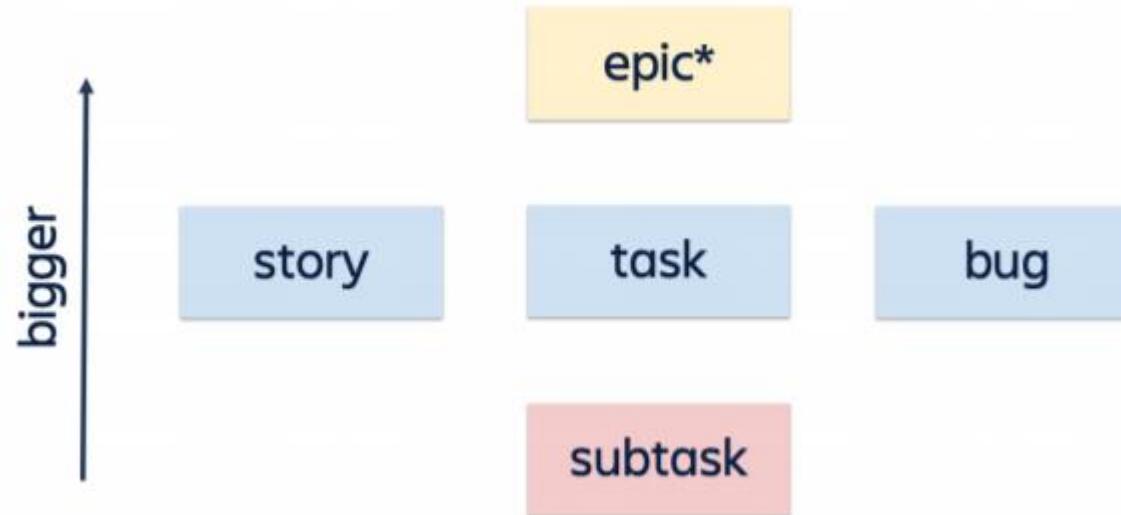


# Why issue types

- Supports different types of work
- Each type can have different fields, screens and workflows
- Can report on types separately



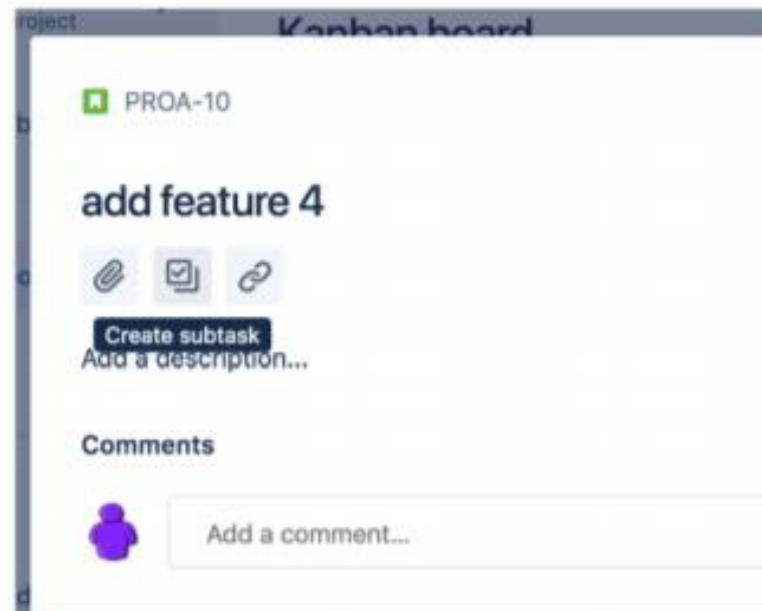
# Jira's issue type hierarchy



\* Epics are discussed later

# Subtasks

- An issue type that must have a parent issue
- Allow an issue to be broken down into individually manageable tasks
- Can be more technical than the parent issue



# Subtask characteristics

- Have their own issue key and field values
- Have independent workflow status

The screenshot shows a Jira subtask creation dialog. At the top, it displays the parent issue key 'PROA-10' and the subtask title 'add feature 4'. Below the title are three icons: a person icon, a checklist icon, and a gear icon. A placeholder text 'Add a description...' is present. The 'Subtasks' section lists two subtasks: 'PROA-17 add feature 4a' and 'PROA-18 add feature 4b', both currently in the 'BACKLOG' status. A large text input field at the bottom contains the placeholder 'What needs to be done?'. At the bottom right are 'Create' and 'Cancel' buttons.

# Topics

- Enrich issues
- Issue types
- Labels
- Developer integration overview



# Labels

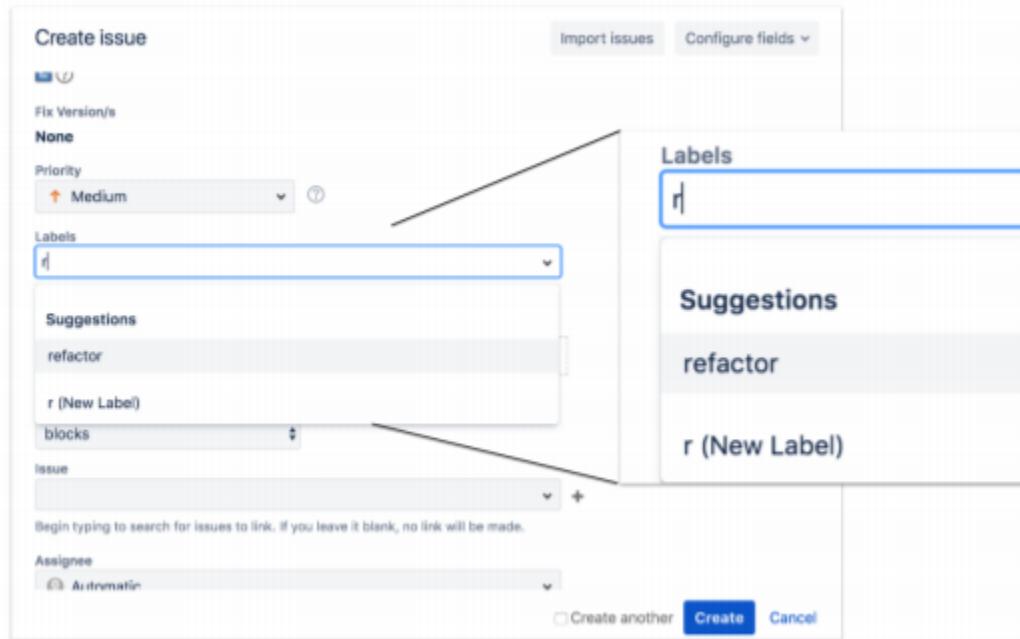
A field used to categorize and search for issues

The screenshot shows a Jira issue card for 'PROJ-6'. The card has the following fields:

- Summary:** complete task 1
- Status:** Selected for Development
- Assignee:** Unassigned
- Labels:** refactor, database
- Priority:** Medium
- Reporter:** Steve Byrnes
- Comments:** Add a comment...
- Subtasks:** PROJ-10: complete task 1a (Backlog)

Two labels, 'refactor' and 'database', are highlighted with blue boxes and arrows pointing to them from the text 'Labels' on the right.

# Adding or creating a labels



# Searching for a Labeled issues

Click on a label to search for all issues with this label

The image shows a Jira interface. On the left, a new issue is being created for 'PROJ-6' with the title 'complete task 1'. The 'Labels' field contains 'database refactor'. On the right, a 'Search' results page displays the query 'labels = "refactor"' with two results: 'PROJ-10 PROJ-6 / complete task 1a' and 'PROJ-6 complete task 1'. A red arrow points from the 'refactor' label in the issue creation screen to the 'refactor' label in the search results.

PROJ-6

complete task 1

Add a description...

Subtasks:

Comments

Status: Selected for Development

Assignee: Unassigned

Labels: database refactor

Priority: Medium

Reporter: Steve Byrnes

Show more

Created 6 days ago Updated 8 minutes ago

Labels

database refactor

Search Save as

labels = "refactor"

1-2 of 2

T Key Summary

PROJ-10 PROJ-6 / complete task 1a

PROJ-6 complete task 1

1-2 of 2

# Topics

- Enrich issues
- Issue types
- Labels
- **Developer integration overview**



# The issue detail development panel

Issue detail view  
for selected issue



## Development

4 commits

Latest 2 days ago

1 pull request MERGED

Updated 2 days ago

1 build ✓

Latest 2 days ago

---

Deployed to QA

---

Create a branch or view existing  
branches related to this issue



[Create branch](#)

# Integration works through the issue key

## Using a Commit Message

Include an issue key in a commit message  
“Initial commit – TIS-498”

## Using a Branch Name

Include an issue key in a branch name  
“Feature branch TIS-498”

## For Pull Requests

Include an issue key in a pull request title, or Jira can use the issue key from an associated commit or branch

## For Builds and Deployments

Jira uses the issue key associated with a commit in the build

# Takeaways

- An Issue contains a diverse set of fields that are used to add Information to the Issue
- Issues can facilitate team communication with comments and @mentions
- Issue types can have unique fields, screens and workflows
- Subtasks are children of another issue type
- Subtasks have their own issue key and field values
- Labels can be used to categorize and search for Issues
- Jira can be integrated with version control and/or build systems to improve developer-related communication

# Lab 4- Enrich Issues

- Add Information to an Issue
- Use team-related Issue features
- Create Issue of different types
- Create subtasks
- Add Labels to issues

# Kanban Method



# What will you learn?

- Describe the Kanban method
- Describe the importance of flow
- Identify the purpose of work-in-progress limits
- Differentiate pull vs. push processes
- Identify reasons to separate the backlog from the board

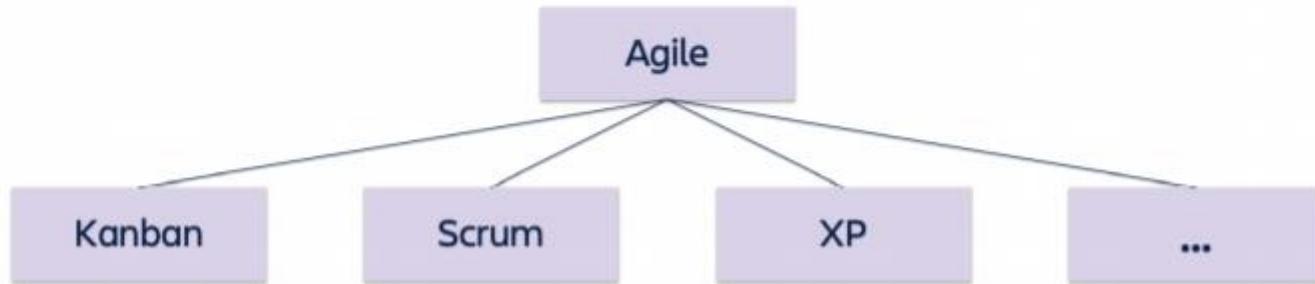
# Topics

- Kanban method overview
- Improving flow
- Pull VS Push
- Separate Backflow



# Agile methods

- Agile is a way of thinking (mindset) and working
- An agile method (or framework) is an approach to implementing agile
- Common agile methods include kanban and scrum
  - Each embody core principles of agile
  - These are often combined



# What is Kanban method?

- An agile method used to manage a continuous queue of work items
- Commonly used ideas:
  - Visualize work
  - Remove process bottlenecks to Improve "flow" of value
  - Limit work in progress/ small batch size
  - Pull work rather than push (where it makes sense)
  - Continuously prioritize work items

# Why choose the Kanban method

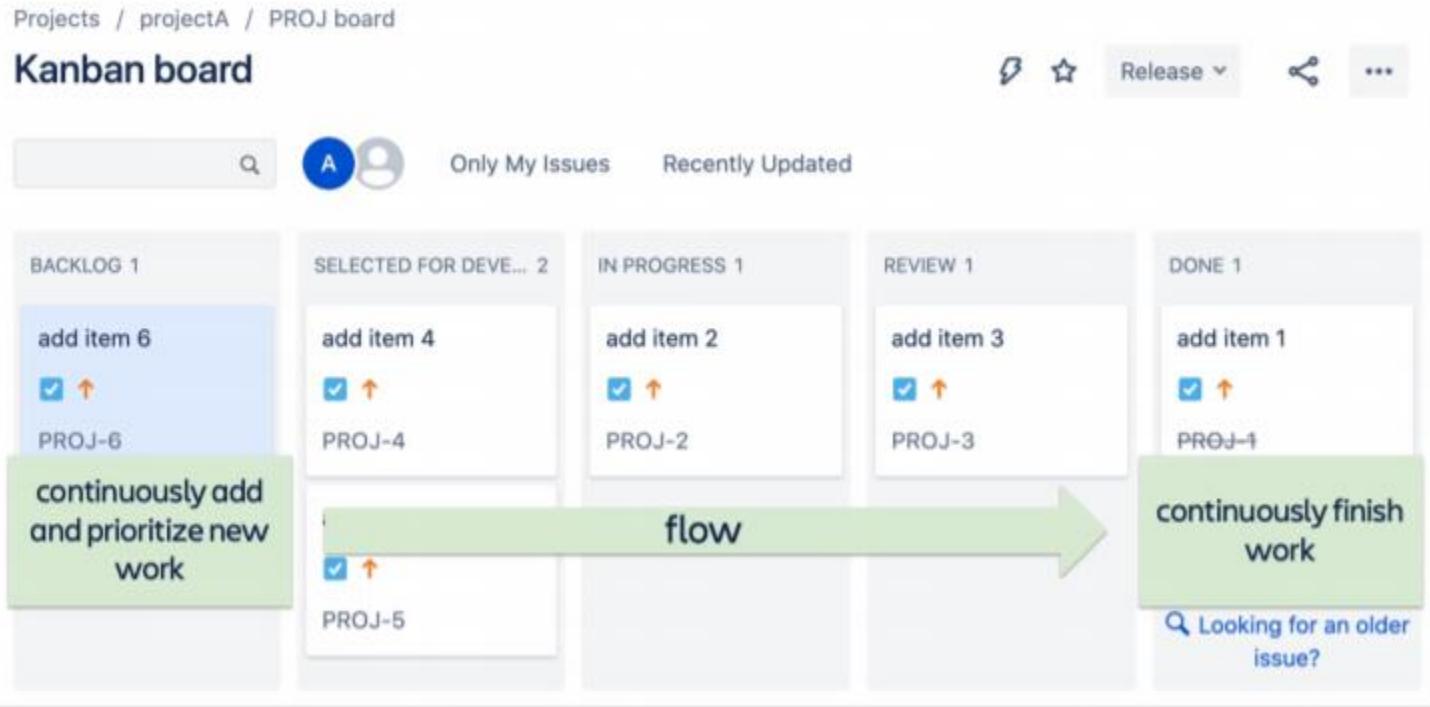
- Very Lightweight and efficient
- Evolutionary approach of transforming to agile
- Works well If the workflow is service-oriented
- operations
- support
- maintenance development
- new hire funnel
- Supports multi-team and multi-project workflows

# Topics

- Kanban method overview
- Improving flow
- Pull VS Push
- Separate Backflow



# Continuous flow of work items



# Improving flow- limit work in progress (WIP)

- How?
  - Specify the minimum and/or maximum number of uses allowed in certain project board columns
- Why?
  - Better flow
  - Limits waste
  - Promotes teamwork

# Column under minimum limit

Projects / projectA / PROJ board

## Kanban board

Only My Issues   Recently Updated

BACKLOG 2	SELECTED FOR DEVE... 1	IN PROGRESS 1	REVIEW 1	DONE 1
add item 5 PROJ-5	add item 4 PROJ-4	add item 2 PROJ-2	add item 3 PROJ-3	add item 1 PROJ-1

Min 2

Only My Issues   Recently Updated

IN PROGRESS 1

add item 2  
PROJ-2

SELECTED FOR DEVE... 1

add item 4  
PROJ-4

BACKLOG 2

add item 5  
PROJ-5

add item 6  
PROJ-6

REVIEW 1

add item 3  
PROJ-3

DONE 1

add item 1  
PROJ-1

We're only showing recently modified issues.

Looking for an older issue?

# Column over maximum limit

Projects / projectA / PROJ board

## Kanban board

The screenshot shows a Jira Kanban board for projectA. The board has five columns: BACKLOG (1 item), SELECTED FOR DEVEL... (2 items), IN PROGRESS (0 items), REVIEW (3 items, Max 2), and DONE (0 items). A red arrow points down to the REVIEW column, which contains three items: add item 1 (PROJ-1), add item 2 (PROJ-2), and add item 3 (PROJ-3). The REVIEW column has a red border around its cards.

BACKLOG 1

SELECTED FOR DEVEL... 2  
Min 2

IN PROGRESS 0

REVIEW 3 Max 2

DONE 0

We're only showing recently modified issues.

Looking for an older issue?

Column	Items
BACKLOG	add item 6 PROJ-6
SELECTED FOR DEVEL...	add item 4 PROJ-4
IN PROGRESS	0
REVIEW	add item 1 PROJ-1 add item 2 PROJ-2 add item 3 PROJ-3
DONE	0

# What should WIP limits be set to?

- Could start with no WIP limits
- Add WIP limits as the process shows problems
- Could set WIP limits to discourage multitasking
- Could set WIP limits on steps that the team neglects

Projects / projectA / PROJ board

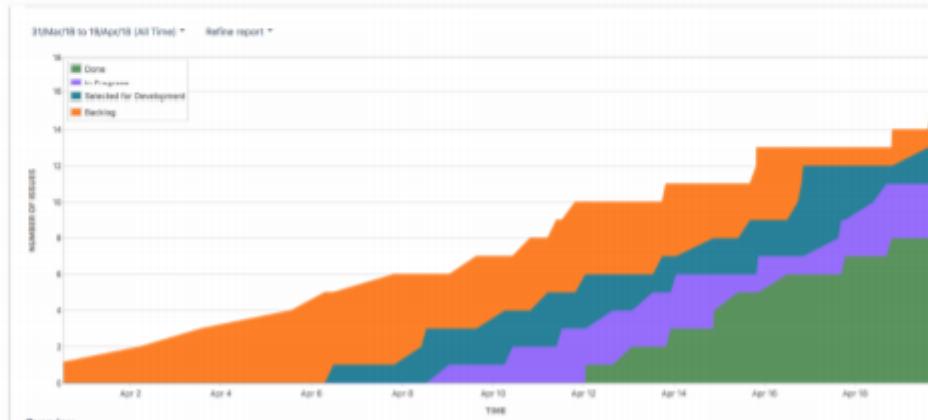
## Kanban board

Only My Issues Recently Updated

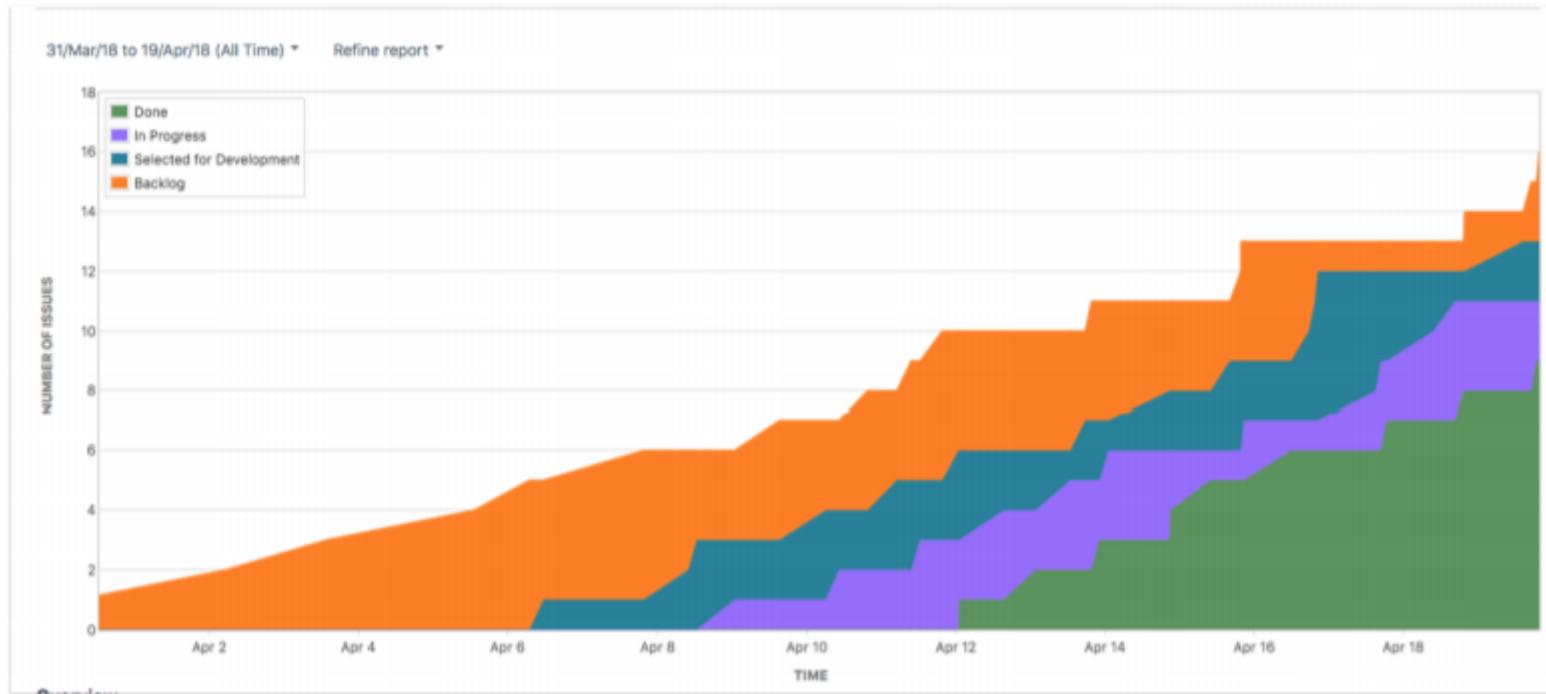
BACKLOG 1	SELECTED FOR DEVELOP... 2 Min 2	IN PROGRESS 1	REVIEW 2 Max 2	DONE 6
add item 6 PROJ-6	add item 4 PROJ-4	add item 3 PROJ-3	add item 1 PROJ-1	We're only showing recently modified issues. Looking for an older issue?
	add item 5 PROJ-5		add item 2 PROJ-2	

# What agile reports

- Visualize the work
- Promote transparency
- Aid troubleshooting and continuous improvement
- Aid planning and estimating



# Cumulative flow



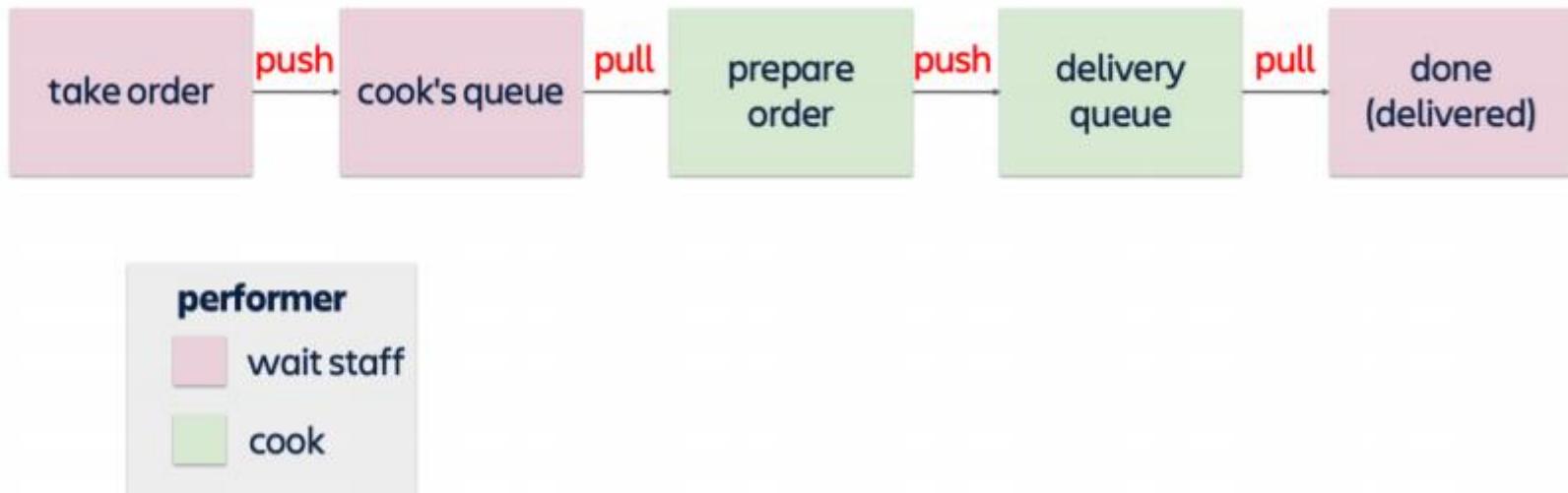
# Topics

- Kanban method overview
- Improving flow
- Pull VS Push
- Separate Backflow



# Pull vs Push in process steps

Performers either push work to the next step or pull from the previous step



# Pull vs Push

Projects / projectA / PROJ board

## Kanban board

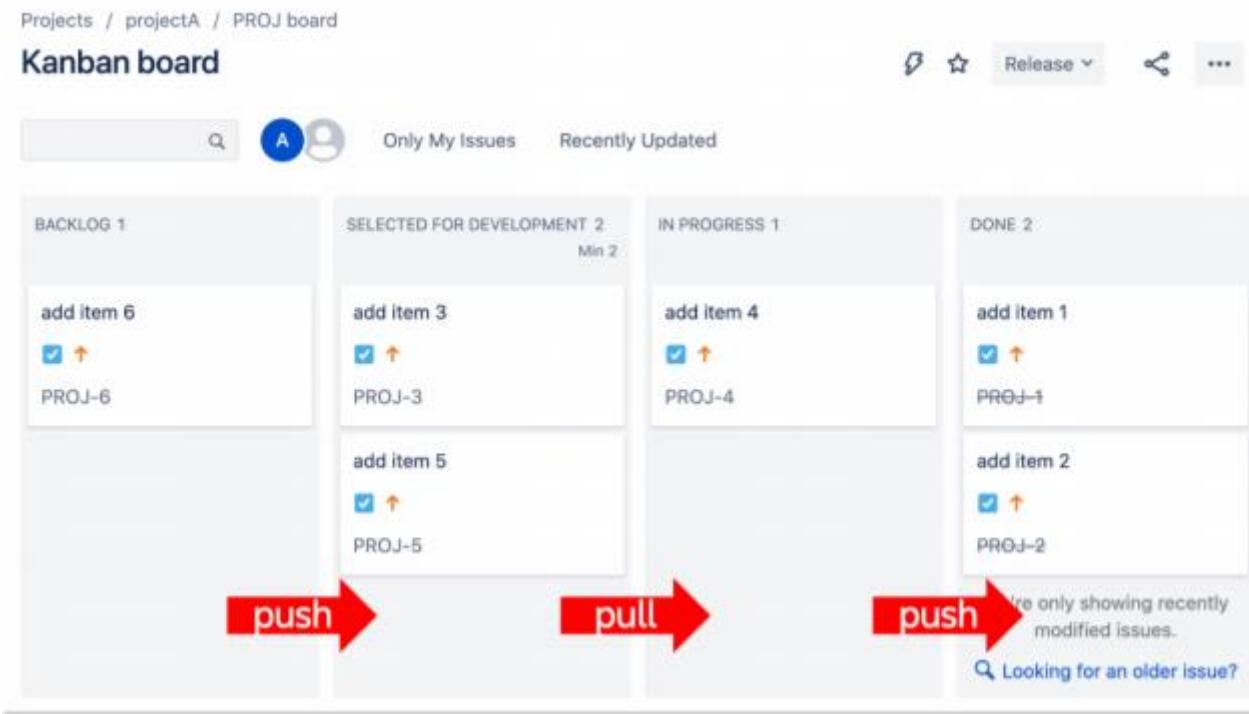
Release

Only My Issues Recently Updated

BACKLOG 1	SELECTED FOR DEVELOPMENT 2	IN PROGRESS 1	DONE 2
add item 6  PROJ-6	add item 3  PROJ-3	add item 4  PROJ-4	add item 1  PROJ-1
	add item 5  PROJ-5		add item 2  PROJ-2

**push** **pull** **push**

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



# Adding queues to enabled pull (1 of 2)

Projects / projectA / PROJ board

## Kanban board

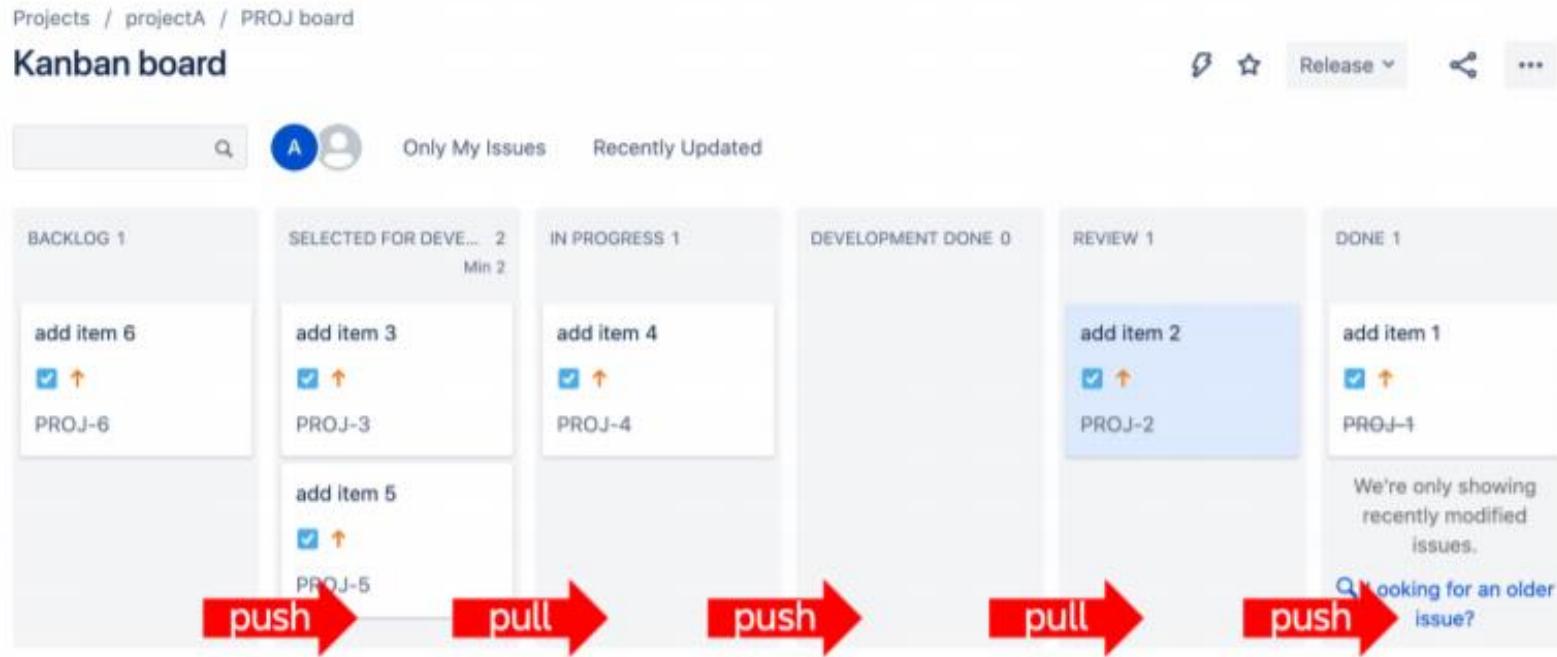
Release    

Only My Issues Recently Updated

BACKLOG 1	SELECTED FOR DEVEL... 2 Min 2	IN PROGRESS 1	REVIEW 1	DONE 1
add item 6   PROJ-6	add item 3   PROJ-3	add item 4   PROJ-4	add item 2   PROJ-2	add item 1   PROJ-1
add item 5  PROJ-5				We're only showing recently modified issues.  Looking for an older issue?

# Adding queues to enabled pull (2 of 2)



# Why Pull ?

- Empowers the team - team members select work, they are not assigned work
- Maintains a sustainable pace

Projects / projectA / PROJ board

## Kanban board

Only My issues Recently Updated

BACKLOG 1	SELECTED FOR DEVELOPMENT 2	IN PROGRESS 1	DONE 3
add item 6 PROJ-6	add item 3 PROJ-3	add item 4 PROJ-4	add item 1 PROJ-1
	add item 5 PROJ-5		add item 2 PROJ-2

**pull**

We're only showing recently modified issues.

Looking for an older issue?

# Topics

- Kanban method overview
- Improving flow
- Pull VS Push
- Separate Backflow



# Separate Backflow

Projects / projectA / PROJ board

## Kanban board

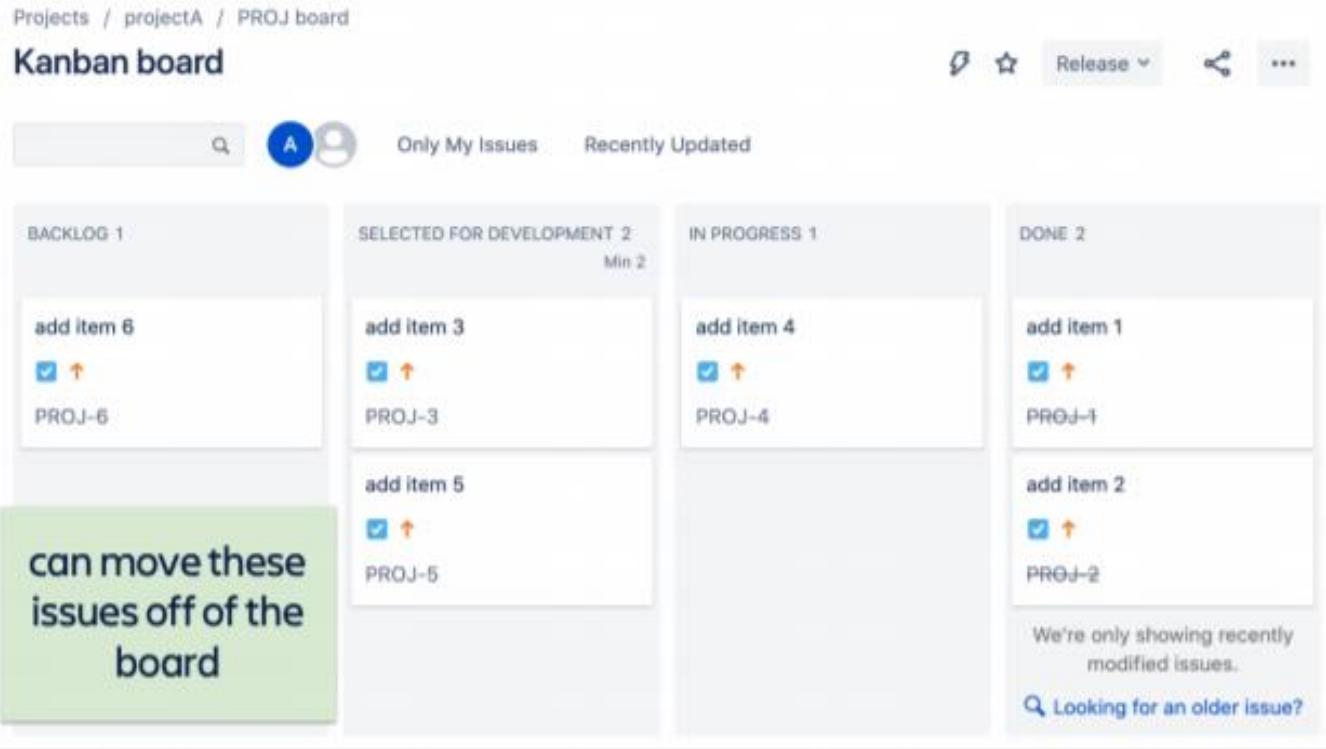
Only My Issues Recently Updated

BACKLOG 1	SELECTED FOR DEVELOPMENT 2	IN PROGRESS 1	DONE 2
add item 6 <input checked="" type="checkbox"/> <input type="button" value="↑"/> PROJ-6	add item 3 <input checked="" type="checkbox"/> <input type="button" value="↑"/> PROJ-3	add item 4 <input checked="" type="checkbox"/> <input type="button" value="↑"/> PROJ-4	add item 1 <input checked="" type="checkbox"/> <input type="button" value="↑"/> PROJ-1
	add item 5 <input checked="" type="checkbox"/> <input type="button" value="↑"/> PROJ-5		add item 2 <input checked="" type="checkbox"/> <input type="button" value="↑"/> PROJ-2

can move these issues off of the board

We're only showing recently modified issues.

Looking for an older issue?



# Why a Separate Backflow?

- Simplicity - separates the planning of issues from the project board
- The team can focus on work items that are ready to be worked on

Projects / projectA / PROJ board

## Kanban board

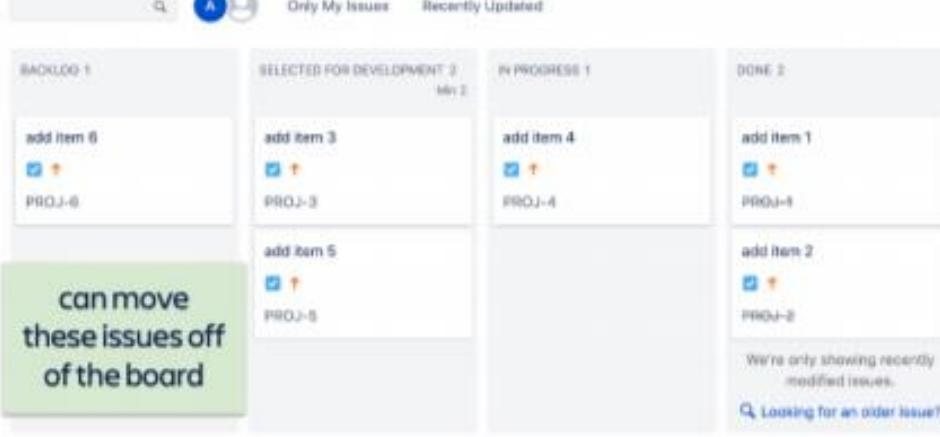
Only My Issues Recently Updated

BACKLOG 1	SELECTED FOR DEVELOPMENT 2	IN PROGRESS 1	DONE 2
add item 6 PROJ-6	add item 3 PROJ-3	add item 4 PROJ-4	add item 1 PROJ-1
	add item 5 PROJ-5		add item 2 PROJ-2

can move these issues off the board

We're only showing recently modified issues.

Looking for an older issue?



# Managing a Separate Backflow

The screenshot shows a Jira project interface for 'projectA' under 'PROJ board'. A red arrow points to the 'Backlog' option in the left sidebar, which is currently selected. The main view displays two sections: 'Selected for Development' and 'Backlog'.

**Selected for Development** (MIN 2 2 issues)

- add item 3 PROJ-3 ↑
- add item 5 PROJ-5 ↑

**Backlog** 1 issue

- add item 6 PROJ-6 ↑

+ Create issue

# Takeaways

- Kanban Is a lightweight agile method
- A board should have a continuous flow of Issues moving from backlog to done columns
- Work in progress Limits can improve the flow of value by focusing team
- In Jira, the backlog can be separated from the board, simplifying the board and allowing separate backlog work

# Lab 5- Kanban Method

- Configure WIP Limits
- View a cumulative flow diagram
- Configure a separate backlog

# Lean and Agile Principals



# What will you learn?

- Identify reasons the Toyota Production System Is studied today
- identify Kanban objects
- Describe benefits of using Kanban objects
- Identify Kanban systems
- Describe Lean principles
- Describe agile principles
- Compare Lean and agile principles

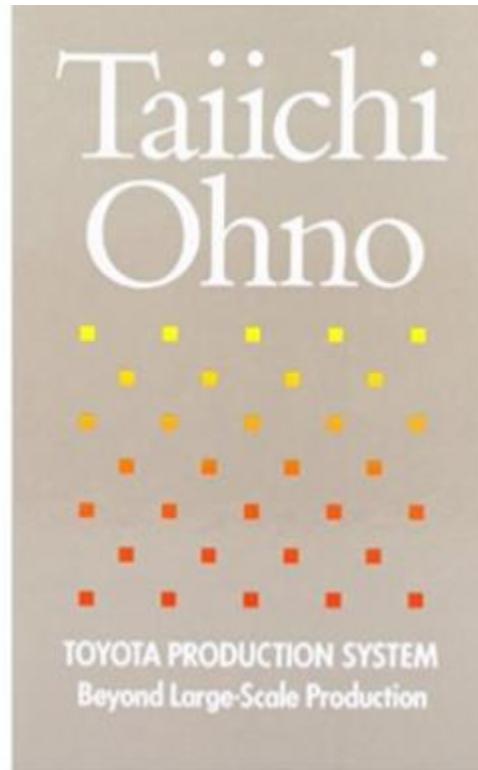
# Topics

- Toyota production system
- Toyota Kanban
- Lean principles
- Agile manifesto
- Lean vs Agile



# Toyota production system

- Written in 1978, English translation in 1988
- Describes what is now sometimes called "lean thinking" or "lean management"
- Many agile principles are similar



# Toyota simplified history

- "Catch up with America in three years."
- Focus was to eliminate waste and increase productivity
- Embraced ideas from Ford, but used a more "agile" approach

"I would like to emphasize that (the Toyota Production System) was realized because there were always clear purposes and needs."

Taichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Lean principles apply broadly

"I am confident (the Toyota Production System) will reveal its strength as a management system..."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production  
preface to the English edition (1988)

# Topics

- Toyota production system
- **Toyota Kanban**
- Lean principles
- Agile manifesto
- Lean vs Agile



# What is Kanban?

- Kanban - an object that controls the flow of work
- The idea came to Toyota from supermarkets
  - Instead of push, order when inventory is low (pull)
  - This matches the supply and demand
  - An empty box is a "kanban" - a signal to order more

"From the supermarket, we got the idea of viewing the earlier process in a production line as a kind of store."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Other examples of Kanbans



guest check



coffee cup



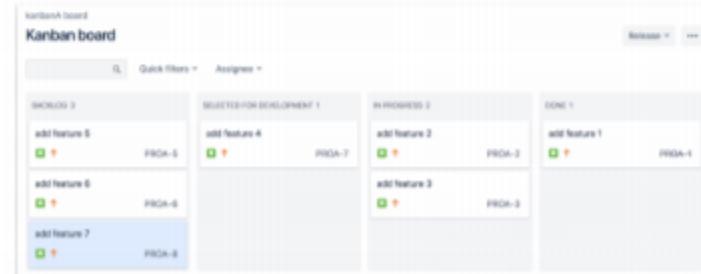
Jira issue

# Kanban systems

"The Toyota Production System is the production method and the kanban system is the way it is managed."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production



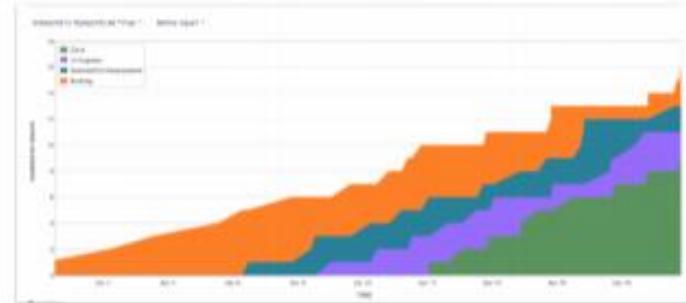
# Benefits of Kanban system

- Visualizes work
- Simple
- Reliable
- Efficient
- Eliminates waste
- Identifies bottlenecks/easy to improve



# Summary – Kanban definitions

- Kanban token - An object that controls the flow of work
- Kanban system - A system that controls the flow of work using kanbans
- Kanban method - A lightweight agile method



# Topics

- Toyota production system
- Toyota Kanban
- **Lean principles**
- Agile manifesto
- Lean vs Agile



# Why principles?

"With a better tool, we can get wonderful results. But if we use it incorrectly, the tool can make things worse."

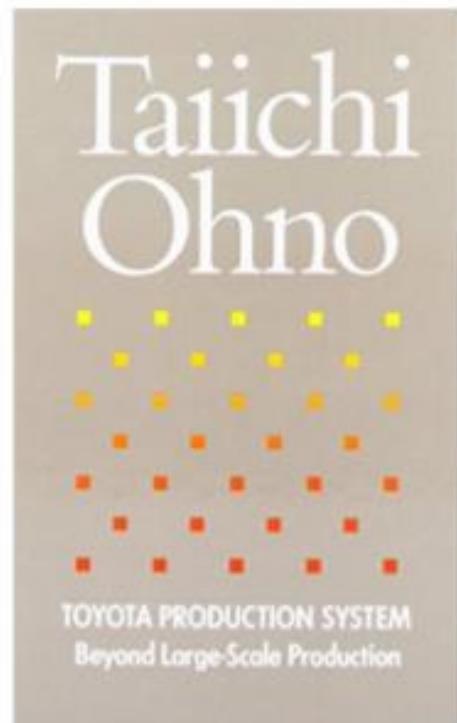
"We should not forget to always use the principles..."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Lean principles

1. Empower the team
2. Visualize work
3. Embrace the scientific method
4. Improve the "flow" of value
5. Build quality in



# Empower the team

"...Operators acquire a **broad spectrum** of production skills... and **participate in** building up a total system in the production plant. In this way, the individual can **find value in working.**"

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Empower the team – teamwork

"A championship team combines good teamwork with individual skill."

"In modern industry, harmony among people in a group, as in teamwork, is in greater demand than the art of the individual craftsman."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Visualize work

- Visual control- Toyota uses kanbans to signal and control the work
- Andon board- An information board that shows any existing problems

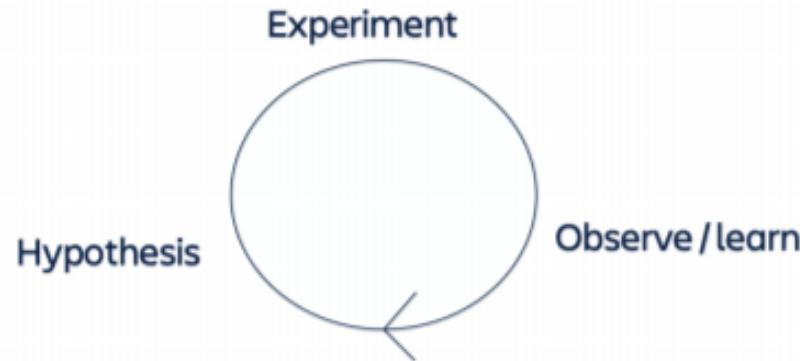
"When one looks up, the andon (the line stop indication board) comes into view, showing the location and nature of trouble situations at a glance."

Taichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Embrace the scientific method

1. Create a hypothesis
2. Build an experiment
3. Observe/learn from the results
4. Repeat/iterate



# Embrace the scientific method

"The Toyota Production System has been built on the practice and evolution of this scientific approach."

"Progress can not be generated when we are satisfied with existing situations."

"... the new market demanded a constantly improving automobile."

Taiichi Ohno  
Toyota Production System: Beyond Large-Scale Production

# Embrace the scientific method-embrace change

"As long as we can not accurately predict the future,  
our actions should change to suit changing situations.  
In industry, it is important to enable people to cope  
with change and think flexibly."

"Build a fine-tuning mechanism into the business so  
that change will not be felt as change."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Improve the flow- limit work in progress / small batch size

"Reducing the number of kanban increases their sensitivity."

"People prefer working with large quantities. It is easier than having to work hard and learn from producing small quantities."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Improve the flow - map the value stream

- Draw the current state
- Draw the desired future state
- Iterate toward the future state

# Improve the flow – pull work

"The conventional way was to supply materials from an earlier process to a later process. So, I tried thinking about the transfer of materials in the reverse direction."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Improve the flow – eliminate waste

"The basis of the Toyota Production System is the absolute elimination of waste."

"The vicious cycle of waste generating waste hides everywhere..."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Improve the flow – reduce setup times

"Our production slogan is 'small lot sizes and quick setups'."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Improve the flow – automate what should be automated

"With computers available, it is a waste to perform calculations by hand."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Summary – ways to improve the flow of value

1. Limit work in progress / small batch size
2. Map the value stream
3. Pull work
4. Eliminate waste
5. Reduce setup times
6. Automate what should be automated

"Look straight at the reality."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Build quality in

"...produce quality products 100 percent of the time..."

Taiichi Ohno

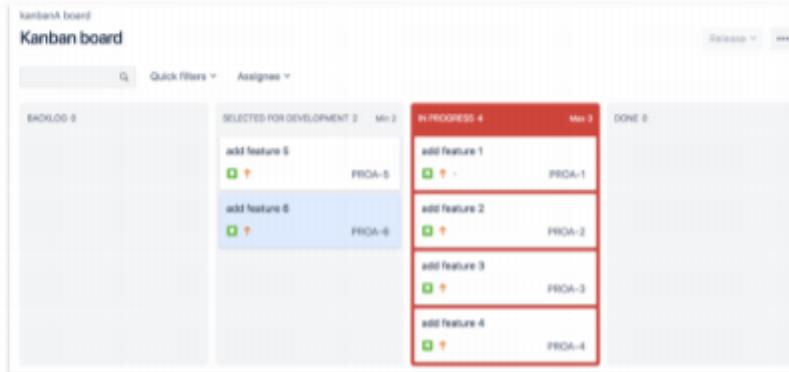
Toyota Production System: Beyond Large-Scale Production

# Build quality in-the process should identify problems

"...distinctions between normal and abnormal operations must be clear and countermeasures (solutions) always taken to prevent recurrence."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production



# Build quality in-fix problems when they are discovered

"Correct a mistake immediately-to rush and not to take time to correct a problem causes work loss later."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Example-fix problems when they are discovered



“Because a device that could distinguish between normal and abnormal conditions was built into the machine, defective products were not produced.”

Taiichi Ohno  
Toyota Production System: Beyond Large-Scale Production

# Build quality in- identify and fix the root cause

"By asking why five times and answering it each time, we can get to the real cause of the problem, which is often hidden behind more obvious solutions."

Taiichi Ohno

Toyota Production System: Beyond Large-Scale Production

# Example: asking “why” to find the root cause and solution

**Problem:** The orbiter crashed into the planet.

**Question:** Why did the orbiter crash into the planet?

**Answer:** Because it didn't have the proper trajectory on approach.

**Question:** Why didn't it have the proper trajectory on approach?

**Answer:** Because the thrusters did not work properly.

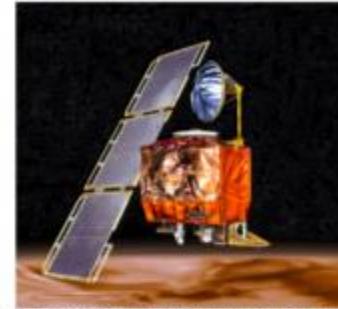
**Question:** Why didn't the thrusters work properly?

**Answer:** Because the acceleration data in the software was inaccurate.

**Question:** Why was the acceleration data inaccurate?

**Answer:** Because one team used metric units and the other used English units.

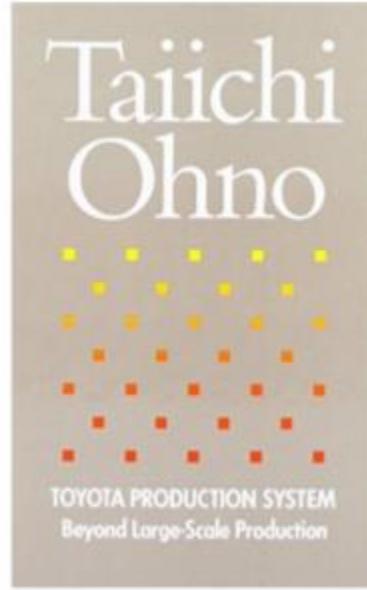
**Solution:** Standardize on a single system of measurement. Ensure pre-launch tests fail in similar circumstances.



<https://commons.wikimedia.org/w/index.php?curid=3>

# Lean principles

1. Empower the team
2. Visualize work
3. Embrace the scientific method
  - a. Continuously learn and improve
  - b. Embrace change
4. Improve the "flow" of value
  - a. Limit work in progress / small batch size
  - b. Map the value stream
  - c. Pull work
  - d. Eliminate waste
  - e. Reduce setup times
  - f. Automate what should be automated
5. Build quality in
  - a. The process should identify problems
  - b. Fix problems when they are discovered
  - c. Identify and fix the root cause



# Topics

- Toyota production system
- Toyota Kanban
- Lean principles
- **Agile manifesto**
- Lean vs Agile



# Manifesto for Agile software development

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- **Individuals and interactions** over processes and tools
- **Working software** over comprehensive documentation
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

Kent Beck	James Grenning	Robert C. Martin
Mike Beedle	Jim Highsmith	Steve Mellor
Arie van Bennekum	Andrew Hunt	Ken Schwaber
Alistair Cockburn	Ron Jeffries	Jeff Sutherland
Ward Cunningham	Jon Kern	Dave Thomas
Martin Fowler	Brian Marick	

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but only in its entirety through this notice.

<https://agilemanifesto.org>

# Agile manifesto values statements-takeaway principles

1. Empower the team
  - "Individuals and interactions over processes and tools"
2. Embrace change
  - "Responding to change over following a plan"
3. Partner with the customer
  - "Customer collaboration over contract negotiation"
4. Plan, develop and deliver incrementally
  - "Working software over comprehensive documentation"

# Principle behind the Agile Manefesto

**Principles behind the Agile Manifesto**

*We follow these principles:*

- Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
- Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
- Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
- Business people and developers must work together daily throughout the project.
- Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

# Principle and ideas from the Agile Manifesto

- 1. Empower the team**
  - a. Select motivated individuals
  - b. Teams should self-organize
  - c. Collaborate to create shared understanding
- 2. Embrace change**
  - a. Partner with the customer
  - b. Obtain fast feedback
  - c. Continuously inspect and adapt
- 3. Plan, develop and deliver incrementally**
  - a. Prefer conversations for conveying information
  - b. Continuously refactor to maintain agility
  - c. Maintain a sustainable pace
  - d. Completed work items are the primary measure of progress
- 4. Focus on value**
  - a. Eliminate waste
  - b. Continuously strive for simplicity
  - c. Don't compromise on quality

# Topics

- Toyota production system
- Toyota Kanban
- Lean principles
- Agile manifesto
- **Lean vs Agile**



# Lean vs Agile

- **Lean**
  - Used at MIT by John Krafcik (1988)
  - Described the ideas of the Toyota Production System
  - Applies to any type of project
- **Agile**
  - Used by the participants who created the Agile Manifesto (2001)
  - Described a lightweight alternative to waterfall software development
  - Applies to any type of project
- The terms are often used interchangeably
- Can think of lean as more “foundational” than agile – you can be lean and use waterfall project management

# Lean and Agile principles

## Lean

1. Empower the team
2. Visualize work
3. Embrace the scientific method
  - a. Continuously learn and improve
  - b. Embrace change
4. Improve the "flow" of value
  - a. Limit work in progress / small batch size
  - b. Map the value stream
  - c. Pull work
  - d. Eliminate waste
  - e. Reduce setup times
  - f. Automate what should be automated
5. Build quality in
  - a. The process should identify problems
  - b. Fix problems when they are discovered
  - c. Identify and fix the root cause

## Agile

1. Empower the team
  - a. Select motivated individuals
  - b. Teams should self-organize
  - c. Collaborate to create shared understanding
2. Embrace change
  - a. Partner with the customer
  - b. Obtain fast feedback
  - c. Continuously inspect and adapt
3. Plan, develop and deliver incrementally
  - a. Prefer conversations for conveying information
  - b. Continuously refactor to maintain agility
  - c. Maintain a sustainable pace
  - d. Completed work items are the primary measure of progress
4. Focus on value
  - a. Eliminate waste
  - b. Continuously strive for simplicity
  - c. Don't compromise on quality

# Combined Lean and Agile principles

- 1. Empower the team**
  - a. Select motivated individuals
  - b. Teams should self-organize
  - c. Collaborate to create shared understanding
- 2. Visualize work**
- 3. Experiment using the scientific method**
  - a. Continuously learn and improve
  - b. Embrace change
  - c. Partner with the customer
  - d. Continuously inspect and adapt
- 4. Plan, develop and deliver incrementally**
  - a. Prefer conversations for conveying information
  - b. Continuously refactor to maintain agility
  - c. Maintain a sustainable pace
  - d. Completed work items are the primary measure of progress
  - e. Obtain fast feedback
- 5. Improve the "flow" of value**
  - a. Limit work in progress / small batch size
  - b. Map the value stream
  - c. Pull work
  - d. Eliminate waste
  - e. Reduce setup times
  - f. Automate what should be automated
  - g. Continuously strive for simplicity
- 6. Build quality in**
  - a. Don't compromise on quality
  - b. The process should identify problems
  - c. Fix problems when they are discovered
  - d. Identify and fix the root cause

# Scrum Overview 1- Artifacts



# What will you learn?

- Define scrum
- Describe an increment
- Identify scrum artifacts
- Define velocity

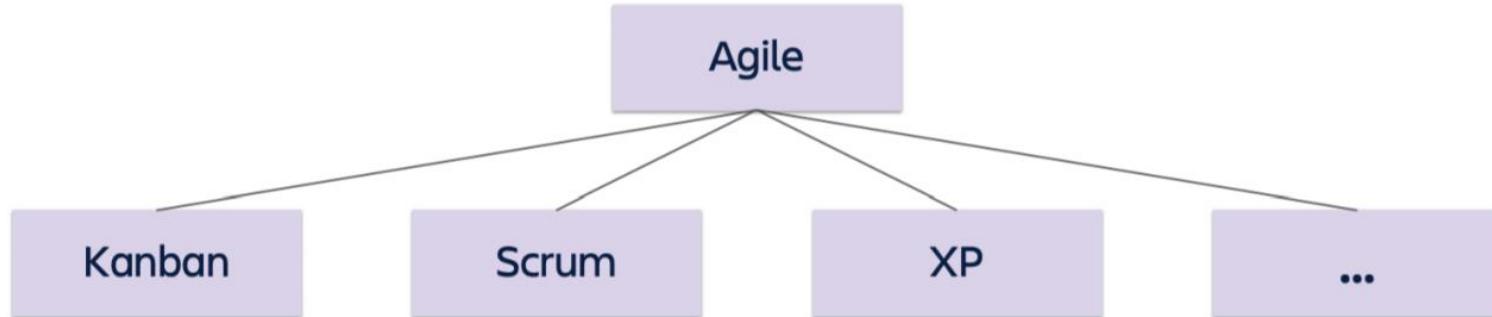
# Topics

- What is scrum?
- Scrum Artifacts

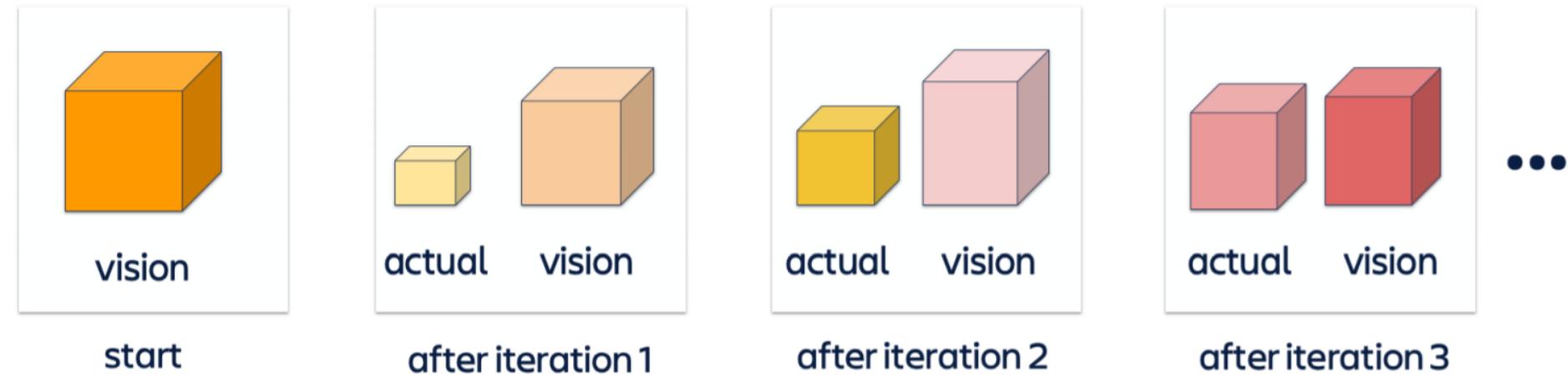


# What is scrum?

- "Scrum is a framework for developing, delivering, and sustaining complex products."  
Scrum Guide 2017
  - <https://www.scrum.org/resources/scrum-guide>
- A way of achieving agility

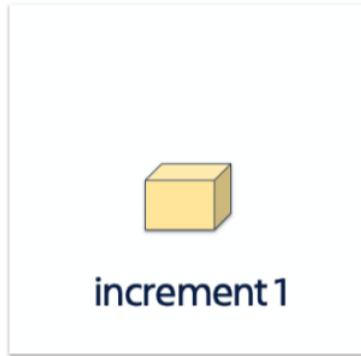


# Continuous learning



# Increment

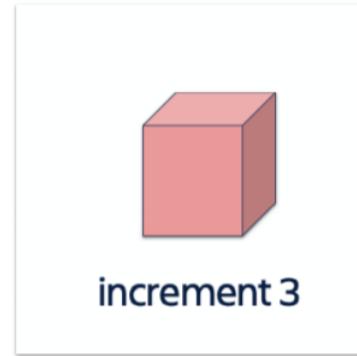
- A usable product that may be given to the customer
- Meets the organization's "definition of done"
- Contains the work of the current iteration, as well as all prior iterations



after iteration 1



after iteration 2



after iteration 3

...

# Sprint

A time-boxed period used to work on an increment of the product

- Usually 1-4 weeks (typically 2 weeks)



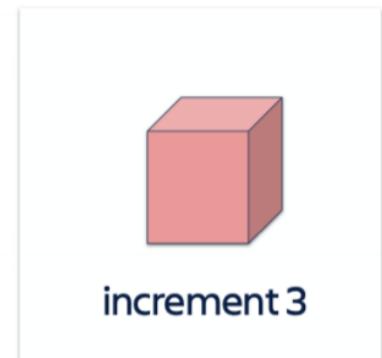
increment 1

after sprint 1



increment 2

after sprint 2



increment 3

after sprint 3

• • •

# Parts of the scrum framework

- **Artifacts**- product backlog, sprint backlog, sprint goal, sprint board, reports
- **Roles** - product owner, scrum master, development team members, stakeholders
- **Events/Meetings/Ceremonies** - sprint, sprint planning meeting, daily standups, sprint review, sprint retrospective

# Topics

- What is scrum?
- Scrum Artifacts



# Scrum Artifacts

- Artifacts:
  - Product backlog
  - Sprint backlog
  - Sprint goal
  - Sprint board
  - Reports
- Provide project transparency
- Enable shared understanding
- Enable inspection and adaptation

Projects / projectB / PRJ board

## Backlog

The screenshot shows a digital backlog interface. At the top, there is a search bar and a user icon labeled 'A'. Below the header, the word 'Backlog' is followed by '3 issues'. On the left, there are navigation tabs: 'VERSIONS' and 'EPICS'. The main area displays three backlog items, each with a green icon and the text 'add item 1', 'add item 2', and 'add item 3'. The third item, 'add item 3', is highlighted with a blue background. At the bottom right, there is a button labeled '+ Create issue'.

Backlog	3 issues
add item 1	
add item 2	
add item 3	

+ Create issue

# Product Backlog

- An ordered, ever-changing to do list for the project
- Can include features, improvements, bug fixes, etc.
- Issues near the top should include more detail
- Modifying the product backlog is called product backlog refinement

Projects / projectB / PRJ board

## Backlog

Share ...

Only My Issues Recently Updated

SEARCH A 8

Backlog 3 issues Create sprint ...

VERSIONS	ISSUES	SPRINTS
	add item 1	PRJ-1 ↑ -
	add item 2	PRJ-2 ↑ -
EPICS	add item 3	PRJ-3 ↑ -

+ Create issue

# Creating a sprint with Jira

Projects / projectB / PRJ board

## Backlog

Share ...

Only My Issues Recently Updated

A

PRJ Sprint 1 0 issues

Start sprint Linked pages 0 ...

VERSIONS

EPICS

Plan your sprint  
As a team, agree on what work needs to be completed, and drag these issues to the sprint.

+ Create issue

0 issues Estimate 0

Backlog 3 issues

Create sprint ...

PRJ-1 ↑ -

PRJ-2 ↑ -

PRJ-3 ↑ -

add item 1

add item 2

add item 3

+ Create issue

# Sprint Backlog

- A subset of the product backlog
- The list of issues to be completed in the sprint
- Includes the plan on how to accomplish the work of the issues
- Can fully emerge during the sprint

Projects / projectB / PRJ board

## Backlog

Share ...

Only My Issues Recently Updated

A

PRJ Sprint 1 2 issues

Start sprint Linked pages 0 ...

VERSIONS EPICS

sprint backlog

add item 1	PRJ-1 ↑ 1
add item 2	PRJ-2 ↑ 2

+ Create issue

2 issues Estimate 3

Backlog 1 issue

Create sprint ...

add item 3	PRJ-3 ↑ 3
------------	-----------

+ Create issue

# Estimation-story point

- Story points are a relative measure of the amount of work (effort) required to complete the story
- Used to help decide how many stories can be completed in the sprint

Projects / projectB / PRJ board

## Backlog

Share ...

A Only My Issues Recently Updated

Versions

PRJ Sprint 1 2 issues

Start sprint Linked pages 0 ...

EPICS

add item 1 PRJ-1 ↑ 1

add item 2 PRJ-2 ↑ 2

+ Create issue

2 issues Estimate 3

Backlog 1 issue

Create sprint ...

+ Create issue

PRJ-3 ↑ 3

Description Add a description...

Story Points

1

The screenshot shows a Jira backlog board for a project named 'projectB'. At the top, there are two sprints: 'PRJ Sprint 1' containing 'add item 1' (1 point) and 'add item 2' (2 points), and 'Backlog' containing 'add item 3' (3 points). A sidebar on the right displays the 'Story Points' for each item: 'add item 1' is 1 point, 'add item 2' is 2 points, and 'add item 3' is 3 points. The interface includes filters for 'Only My Issues' and 'Recently Updated', and buttons for 'Start sprint' and 'Linked pages'.

# Sprint Details

Start sprint

2 issues will be included in this sprint.

Sprint name: \*  
PRJ Sprint 1

Duration: \*  
2 weeks

Start date: \*  
01/Jul/20 4:38 PM 

End date: \*  
15/Jul/20 04:38 PM 

Sprint goal:

# Sprint Goal

- Represents the objective of the sprint's increment
- Is reached by completing the sprint backlog
- Does not change during the sprint
- The sprint is a success if the sprint goal is reached

Start sprint

2 issues will be included in this sprint.

Sprint name: \* PRJ Sprint 1

Duration: \* 2 weeks

Start date: \* 01/Jul/20 4:38 PM 

End date: \* 15/Jul/20 04:38 PM 

Sprint goal:

Create the first product increment.

# Why have a sprint goal

1. Provides coherence to the product increment
2. Enables flexibility with the sprint backlog

Start sprint

2 issues will be included in this sprint.

Sprint name: \* PRJ Sprint 1

Duration: \* 2 weeks

Start date: \* 01/Jul/20 4:38 PM 

End date: \* 15/Jul/20 04:38 PM 

Sprint goal:

Create the first product increment.



# Sprint board

Only contains issues from the sprint backlog

Projects / projectB / PRJ board

**PRJ Sprint 1**

Create the first product increment.

Only My Issues Recently Updated

TO DO      IN PROGRESS      DONE

Item	Status
add item 1	PRJ-1
add item 2	PRJ-2

A

projectB  
Classic software project

PRJ board Board

Backlog

Active sprints

Reports

Releases

Issues and filters

Pages

Components

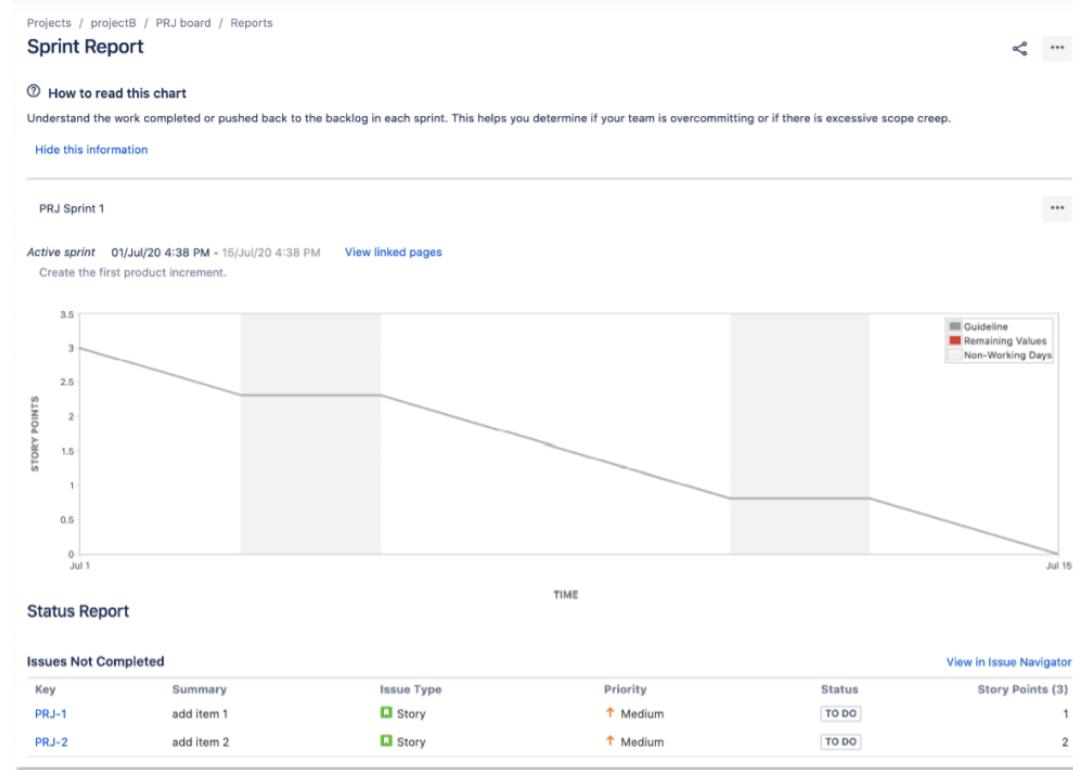
Add item

Project settings

# Scrum Reports – Burndown chart



# Scrum Reports – Sprint Report



# Velocity

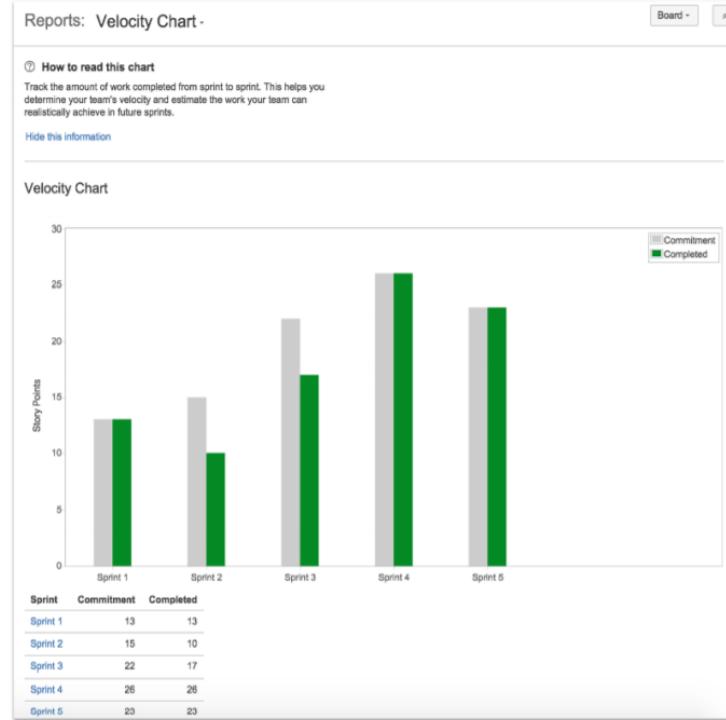
Represents the rate at which the team accomplishes work

- Usually it is the number of story points completed per sprint
- In this example, the velocity is 3 story points per sprint



# Scrum Reports – Velocity Charts

Shows the estimated and actual velocity of the team over time



# Takeaways

- Scrum is an agile framework
- An increment is a potentially shippable portion of the project that meets the "definition of done"
- A sprint is a time-boxed period in which an increment is created
- Scrum artifacts provide project transparency, enable shared understanding, and enable inspection and adaptation
- Artifacts include the product backlog, the sprint backlog, the sprint goal, sprint boards and reports
- Velocity is the rate at which the team accomplishes work, usually in story points per sprint

# Scrum Overview 11- Roles and Events



# What you will learn

- Describe scrum roles
- Differentiate the product owner and scrum master
- Identify common characteristics of scrum events
- Identify the purpose of the sprint planning meeting, daily standup, sprint review and sprint retrospective

# Topics

- Scrum roles
- Scrum Events



# Scrum Team

- Made up three roles: product owner, scrum master, development team
- Cross-functional
- Flexible/adaptable
- Self-organizing



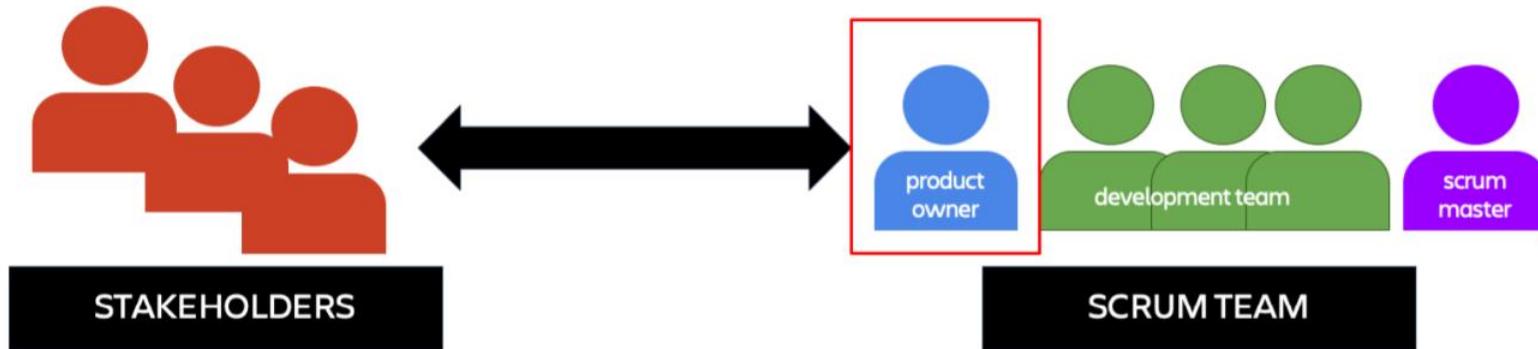
# Stakeholders

- Others interested in the success of the project
- Internal- company managers, executives, other scrum teams
- External- customers, partners, investors



# Product Owner

- Responsible for:
  - communicating the product vision
  - maximizing the value of each increment
  - the product backlog
- Interacts with, represents and is accountable to stakeholders



# Scrum Master

- Responsibilities include:
  - promoting and supporting scrum
  - improving the day-to-day effectiveness of the team
  - protecting the focus of the team
  - increasing the transparency of the project
- Typical tasks:
  - coaching the scrum team and stakeholders on scrum
  - removing blocking issues
  - facilitating scrum events
  - configuring scrum artifacts
  - monitoring sprint progress



# Product Owner VS Scrum Master



## Why separate roles?

- Divide and concur
- Checks and balances

# Development team

- Cross-functional, adaptive team that does the work of the project
- Responsibilities include:
  - estimating issues
  - deciding how much work can be done in a sprint
  - deciding how to organize to do the work of the sprint
  - creating the increment of each sprint
  - ability to modify the sprint backlog during the sprint
- The Scrum Guide recommends three to nine members



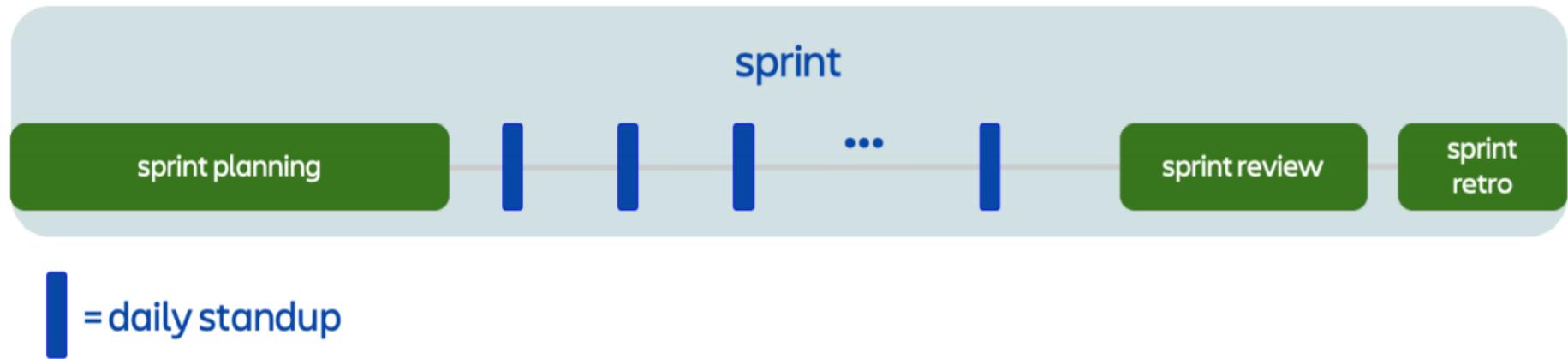
DEVELOPMENT TEAM

# Topics

- Scrum roles
- Scrum Events

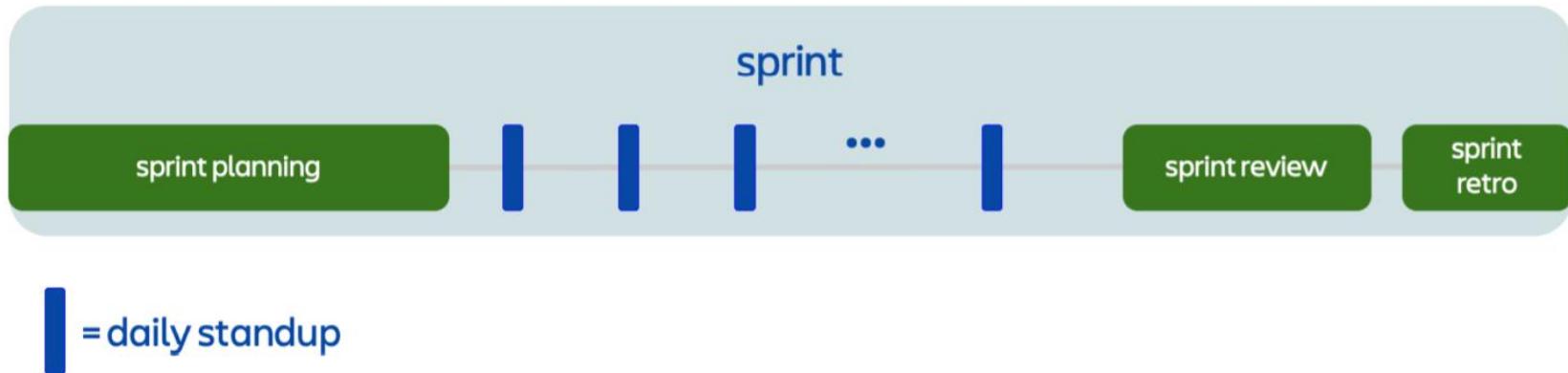


# Scrum Events



# Characteristics of all scrum meetings

- Fixed maximum time limit, no minimum time limit
- Meetings are primarily to plan, inspect and adapt
- Primarily about collaborating, not updating status
- Primarily spend time on things of value to all participants



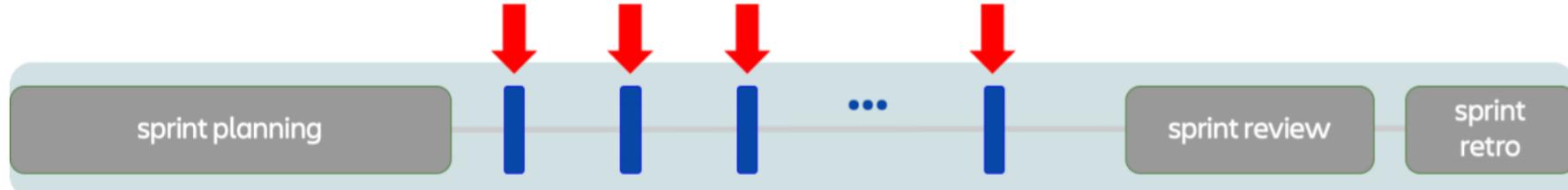
# Sprint planning meeting

- **Attendees:** entire scrum team
- **Duration:** typically four hours for a two week sprint
- **Purpose:** plan the work of the sprint
- **Output:** sprint goal, sprint backlog



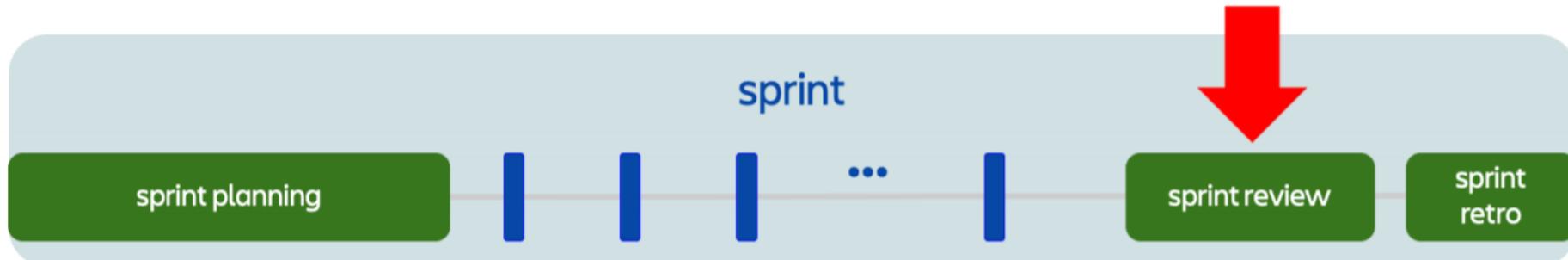
# Daily Standup

- **Attendees:** development team and scrum master (primarily)
- **Duration:** 15 minutes
- **Purpose:**
  - Inspect recent progress toward the sprint goal
  - Plan the day's work
  - Identify any impediments, and plans to resolve them
- **Output:** plan for the day



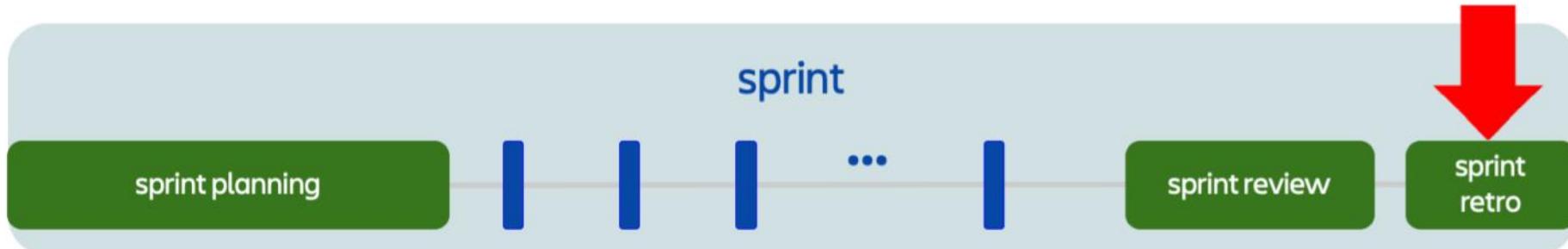
# Sprint Review

- **Attendees:** scrum team and stakeholders
- **Duration:** typically 2 hours for a 2 week sprint
- **Purpose:** Inspect the increment and collaboratively update the product backlog
- **Output:** first-pass next sprint backlog



# Sprint Retrospective

- **Attendees:** scrum team
- **Duration:** typically 90 minutes for a 2 week sprint
- **Purpose:** the team inspects itself, including its processes, tools and team interaction
- **Output:** Improvement issue(s) added to the next sprint's backlog

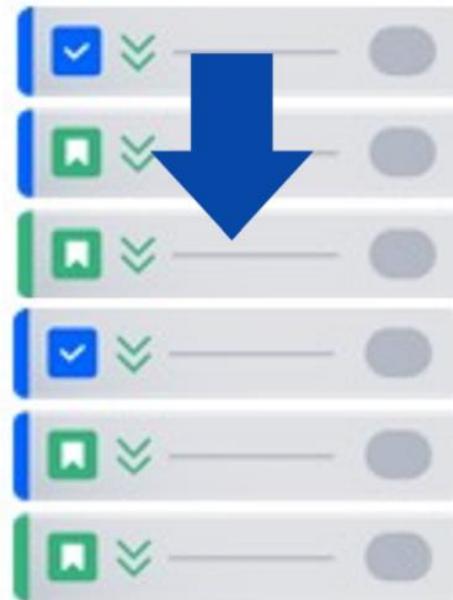


# Scrum meetings - summary

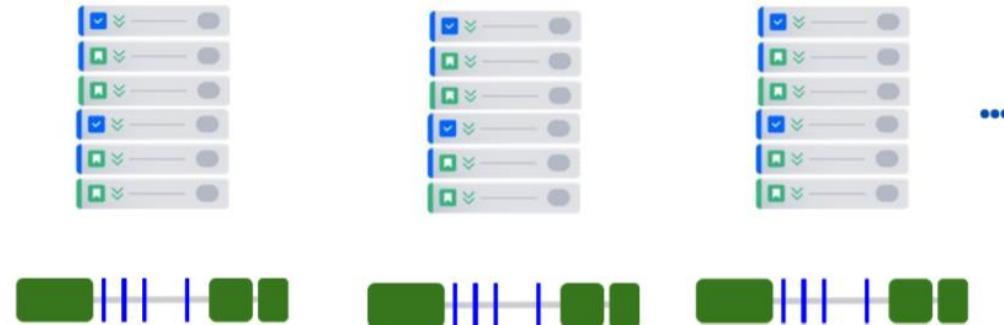
	Sprint Planning	Daily Standup	Sprint Review	Retrospective
<b>Attendees</b>	Scrum team	Development team (primarily)	Scrum team and stakeholders	Scrum team
<b>Duration*</b>	4 hours	15 minutes	2 hours	90 minutes
<b>Purpose</b>	Plan the work of the sprint	Inspect recent work, plan today	Inspect increment, brainstorm next sprint	Inspect team
<b>Output</b>	Sprint goal, Sprint backlog	Today's plan	Proposed next sprint backlog	Amended next sprint backlog

\* typical max duration assuming a two week sprint

# Kanban vs Scrum



Kanban



Scrum

# Takeaways

Scrum roles include:

- product owner
- scrum master
- development team members
- stakeholders

Scrum meetings include:

- sprint planning meeting
- daily standups
- sprint review
- sprint retrospective

# Lab 8 - Scrum Overview II

- Create a scrum project
- Create issues in the product backlog
- Create and plan a sprint
- Execute a sprint
- Complete a sprint

# Quick Search and Basic Search



# What you will learn

- Identify the ways to search in Jira
- Use quick search
- Use basic search

# Topics

- Searching overview
- Quick search
- Basic search



# Viewing a project's progress



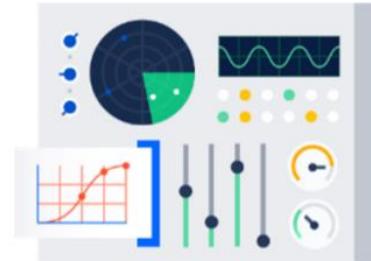
Boards



Search



Reports



Dashboards

# Searching

## 1. Quick search

The screenshot shows the Jira search interface. At the top is a search bar with the placeholder "Search Jira". Below it is a link to "Advanced search for issues". A sidebar on the left lists "RECENTLY VIEWED ISSUES" with items: PRJ-1 add item 1, PRJ-3 add item 3, and PRJ-2 add item 2. Below that is a section for "BOARDS, PROJECTS AND FILTERS" with items: PROJ board, PRJ board, projectA (PROJ), and projectB (PRJ). At the bottom of the sidebar are links to "Go to all: Issues, Boards, Projects, Filters, People".

Search Jira

Advanced search for issues

RECENTLY VIEWED ISSUES

- PRJ-1 add item 1
- PRJ-3 add item 3
- PRJ-2 add item 2

BOARDS, PROJECTS AND FILTERS

- PROJ board
- PRJ board
- projectA (PROJ)
- projectB (PRJ)

Go to all: Issues Boards Projects Filters People

# Searching

1. Quick search
2. Basic search (user interface elements)

All issues [Save as](#)

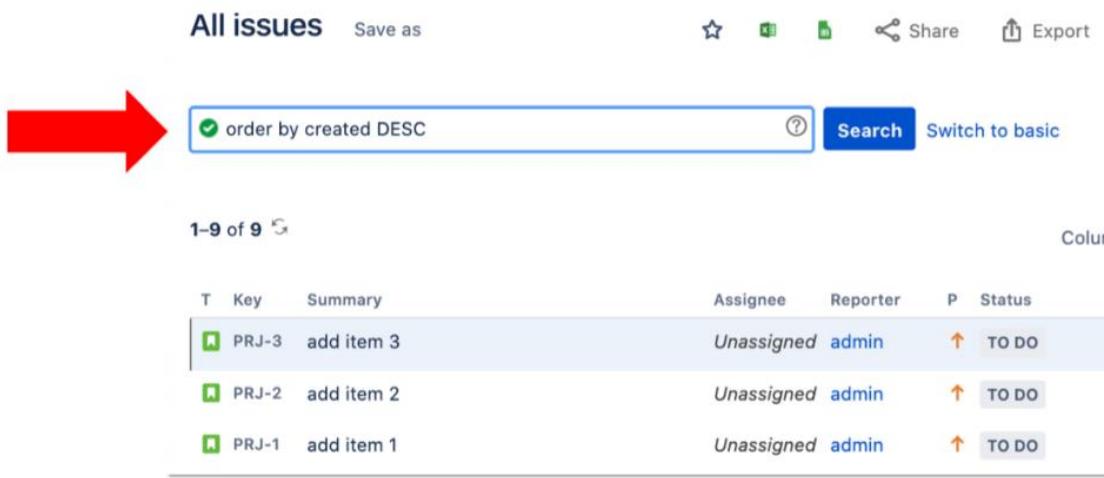
 Project: All ▾ Type: All ▾ Status: All ▾ Assignee: All ▾ + More  [Search](#) [Switch to JQL](#)

1–9 of 9 [S](#)

T	Key	Summary	Assignee	Reporter	P	Status
	PRJ-3	add item 3	Unassigned	admin		<a href="#">TO DO</a>
	PRJ-2	add item 2	Unassigned	admin		<a href="#">TO DO</a>
	PRJ-1	add item 1	Unassigned	admin		<a href="#">TO DO</a>

# Searching

1. Quick search
2. Basic search (user interface elements)
3. Advanced search (JQL)

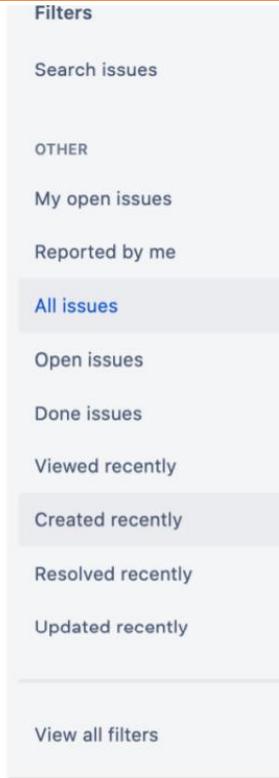


The screenshot shows a Jira search results page titled "All issues". At the top, there are several icons: a star, a green square, a blue square, a share button, and an export button. Below these are three buttons: "Save as", "Share", and "Export". A red arrow points to the search bar, which contains the text "order by created DESC". To the right of the search bar are a help icon, a "Search" button, and a "Switch to basic" link. The search results show 1-9 of 9 items. The columns are Key, Summary, Assignee, Reporter, and Status. The data is as follows:

T	Key	Summary	Assignee	Reporter	P	Status
	PRJ-3	add item 3	Unassigned	admin	↑	TO DO
	PRJ-2	add item 2	Unassigned	admin	↑	TO DO
	PRJ-1	add item 1	Unassigned	admin	↑	TO DO

# Searching

1. Quick search
2. Basic search (user interface elements)
3. Advanced search (JQL)
4. Filters



# Searching

1. Quick search
2. Basic search (user interface elements)
3. Advanced search (JQL)
4. Filters
5. Quick filters

Projects / projectA / PROJ board

Kanban board

The screenshot shows a Jira Kanban board for projectA. At the top, there's a navigation bar with a search icon, a user profile (labeled 'A'), and filter options ('Only My Issues' and 'Recently Updated'). Below the navigation bar are three columns: 'SELECTED FOR DEVELOPMENT 2' (Min 2), 'IN PROGRESS 2', and 'REVIEW 0'. Each column contains two items, each with a title, a checkmark icon, and a progress indicator (blue up arrow, orange down arrow, grey circle). The first item in the 'Selected for Development' column is 'add item 3' (PROJ-3) and the second is 'add item 5' (PROJ-5). The first item in the 'In Progress' column is 'add item 2' (PROJ-2) and the second is 'add item 4' (PROJ-4).

# Why is searching important?

Adapt your Jira experience to your team's processes

Projects / projectA / PROJ board

## Kanban board

Only My Issues   Recently Updated

SELECTED FOR DEVELOPMENT 2	IN PROGRESS 2	REVIEW 0
Min 2	Min 2	0
<b>add item 3</b> PROJ-3	<b>add item 2</b> PROJ-2	<b>add item 4</b> PROJ-4
<input checked="" type="checkbox"/> ⬆ ⬇	<input checked="" type="checkbox"/> ⬆ ⬇	<input checked="" type="checkbox"/> ⬆ ⬇

# Topics

- Searching overview
- Quick search
- Basic search



# Quick search

The image displays two side-by-side screenshots of the Jira interface, illustrating the differences between the Cloud and Server versions regarding the quick search feature.

**Cloud Version (Left):**

- Search Bar:** A large search bar at the top with the placeholder "Search Jira".
- Advanced Search:** A button labeled "Advanced search for issues".
- Recently Viewed Issues:** A list of recent items:
  - PRJ-1 add item 1
  - PRJ-3 add item 3
  - PRJ-2 add item 2
- Boards, Projects and Filters:** A list of boards and projects:
  - PROJ board
  - PRJ board
  - projectA (PROJ)
  - projectB (PRJ)
- Navigation:** A footer with links to "Go to all:" followed by "Issues", "Boards", "Projects", "Filters", and "People".

**Server Version (Right):**

- Search Bar:** A search bar at the top with the placeholder "Search".
- Issues:** A list of issues:
  - add item 5a  
PROJ-7
  - add item 2  
PROJ-2
  - add item 2  
PROJF-2
  - add item 1  
PROJF-1
  - initial release  
PROJF-4
  - add item 3  
PROJF-3
- View All Issues:** A link to view all issues.
- Projects:** A list of projects:
  - projectA (PROJ)  
Software
  - projectfinal (PROJF)  
Software
- View All Projects:** A link to view all projects.

Cloud

Server

# Quick search- with search terms and keywords

feature

ISSUES

-  add feature 2 PROJ-2
-  add feature 3 PROJ-3
-  add feature 1 PROJ-1
-  add feature 2 PRJ-2
-  add feature 3 PRJ-3
-  add feature 1 PRJ-1

 View all matching issues

feature NOT 1

ISSUES

-  add feature 2 PROJ-2
-  add feature 3 PROJ-3
-  add feature 2 PRJ-2
-  add feature 3 PRJ-3

 View all matching issues

feature OR sample

ISSUES

-  add feature 3 PROJ-3
-  add feature 2 PROJ-2
-  add feature 3 PRJ-3
-  add feature 2 PRJ-2
-  Instructions for deleting this sample SAM-17
-  add feature 1 PROJ-1

# Topics

- Searching overview
- Quick search
- Basic search



# Basic search

Search Save as

Project: All ▾ Type: All ▾ Status: All ▾ Assignee: All ▾ + More Contains text Search Switch to JQL

---

Search Save as

projectA ▾ Type: All ▾ Status: All ▾ Assignee: All ▾ + More Contains text Search Switch to JQL Columns ▾

Find Projects...

	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due
<input checked="" type="checkbox"/> projectA (PROJ)	Ryan Lee	admin	↑	IN PROGRESS	Unresolved	01/Jul/20	02/Jul/20	
<input type="checkbox"/> projectB (PRJ)	Alana Grant	admin	↑	IN PROGRESS	Unresolved	01/Jul/20	02/Jul/20	
<input checked="" type="checkbox"/> PROJ-2 add item 2	Unassigned	admin	↑	SELECTED FOR DEV...	Unresolved	01/Jul/20	01/Jul/20	
<input checked="" type="checkbox"/> PROJ-3 add item 3	Unassigned	admin	↑	SELECTED FOR DEV...	Unresolved	01/Jul/20	01/Jul/20	
<input checked="" type="checkbox"/> PROJ-1 add item 1	Unassigned	admin	↑	DONE	Done	01/Jul/20	01/Jul/20	
<input checked="" type="checkbox"/> PROJ-6 add item 6	Unassigned	admin	↑	BACKLOG	Unresolved	01/Jul/20	01/Jul/20	
<input checked="" type="checkbox"/> PROJ-5 add item 5	Unassigned	admin	↑	SELECTED FOR DEV...	Unresolved	01/Jul/20	01/Jul/20	

1-6 of 6

# Contains Text

Search Save as

projectA ▼ Type: All ▼ Status: All ▼ Assignee: All ▼ + More item NOT 1 Search Switch to JQL

1-5 of 5 

T	Key	Summary	Assignee	Reporter	P	Status	Resolutio
<input checked="" type="checkbox"/>	PROJ-4	add item 4	Ryan Lee	admin	 <span>IN PROGRESS</span>	<span>Unresol</span>	
<input checked="" type="checkbox"/>	PROJ-2	add item 2	Alana Grant	admin	 <span>IN PROGRESS</span>	<span>Unresol</span>	
<input checked="" type="checkbox"/>	PROJ-3	add item 3	Unassigned	admin	 <span>SELECTED FOR DEV...</span>	<span>Unresol</span>	
<input checked="" type="checkbox"/>	PROJ-6	add item 6	Unassigned	admin	 <span>BACKLOG</span>	<span>Unresol</span>	
<input checked="" type="checkbox"/>	PROJ-5	add item 5	Unassigned	admin	 <span>SELECTED FOR DEV...</span>	<span>Unresol</span>	

1-5 of 5 



# Searching more fields

A screenshot of a search interface, likely from a project management tool like Jira. The top navigation bar includes 'Search' and 'Save as' buttons, followed by dropdown filters for 'projectA', 'Type: All', 'Status: All', and 'Assignee: All'. A prominent blue button labeled '+ More' is positioned next to a 'Contains text' input field and a 'Search' button. To the right of these controls is a link 'Switch to JQL'. Below the filters, the results are displayed with 1-5 of 5 items. The first item is selected, showing 'PROJ-4 add item 4'. A large red arrow points downwards from the '+ More' button towards a detailed view of the search criteria.

Search Save as

projectA Type: All Status: All Assignee: All + More Contains text Search Switch to JQL

1-5 of 5

T	Key	Summary	... % Limits	Res...
<input checked="" type="checkbox"/>	PROJ-4	add item 4	<input type="checkbox"/> [CHART] Date of First Respo...	GRESS Unre...
<input checked="" type="checkbox"/>	PROJ-2	add item 2	<input type="checkbox"/> [CHART] Time in Status	GRESS Unre...
<input checked="" type="checkbox"/>	PROJ-3	add item 3	<input type="checkbox"/> Approvals	ED FOR DEV... Unre...
<input checked="" type="checkbox"/>	PROJ-6	add item 6	<input type="checkbox"/> Change completion date	OG Unre...
<input checked="" type="checkbox"/>	PROJ-5	add item 5	<input type="checkbox"/> Change reason	ED FOR DEV... Unre...

1-5 of 5

All Criteria

- % Limits
- [CHART] Date of First Response
- [CHART] Time in Status
- Approvals
- Change completion date
- Change reason

...excluding 9 hidden

# Example- Specifying a priority

Search Save as

projectA Type: All Status: All Assignee: All + More Contains text Search Switch to JQL

Priority: All ×

Find Priorities... ×

- ↑ Highest
- ↑ High
- ↑ Medium
- ↓ Low
- ↓ Lowest

	Assignee	Reporter	P	Status	Resolution
PROJ-6 add item 6	Ryan Lee	admin	<span>↑</span>	IN PROGRESS	Unresolved
PROJ-5 add item 5	Alana Grant	admin	<span>↑</span>	IN PROGRESS	Unresolved
			<b>SELECTED FOR DEVELOPMENT</b>	<b>SELECTED FOR DEV...</b>	Unresolved
	Unassigned	admin	<span>↑</span>	BACKLOG	Unresolved
	Unassigned	admin	<span>↑</span>	SELECTED FOR DEV...	Unresolved

1-5 of 5 ↶

The screenshot shows a search interface for a project named 'projectA'. The search bar includes filters for Type, Status, Assignee, and a 'Priority' dropdown set to 'All'. A modal window titled 'Find Priorities...' lists priority levels: Highest, High, Medium, Low, and Lowest, each with a checkbox and an upward or downward arrow icon. Below this is a table of five items. The first two items have their status and resolution columns partially visible. The third item's entire row is highlighted with a dark blue background, and its status and resolution are also partially visible. The fourth and fifth items are also partially visible. At the bottom, a footer indicates '1-5 of 5' items.

# Example- Specifying an updated date

Search [Save as](#)

projectA Type: All Status: All Assignee: All + More Contains text [Search](#) [Switch to JQL](#)

Updated Date: All [X](#)

Within the last 3 days [▼](#)

More than minutes ago [▼](#)

Between 11-Jan-2011 [▼](#) and 30-Jan-2011 [▼](#)

In range -3w 4d to 3w 4d

[Update](#) [Close](#)

PROJ-5 add item 5

1-5 of 5 [G](#)

Assignee	Reporter	P	Status	Resolu
Ryan Lee	admin	↑	IN PROGRESS	Unres
Alana Grant	admin	↑	IN PROGRESS	Unres
Unassigned	admin	↑	SELECTED FOR DEV...	Unres
Unassigned	admin	↑	BACKLOG	Unres
Unassigned	admin	↑	SELECTED FOR DEV...	Unres

# Takeaways

- Quick search can search the text of issues, board names, project names and filter names
- Basic search is a user-friendly way to search for issues

# Lab 9 - Quick Search and Basic Search

- Perform quick searches
- Perform basic searches

# JQL



# What will you learn?

- Describe Jira Query Language (JQL)
- Write JQL using autocomplete
- Use functions in JQL queries

# Topics

- JQL Overview
- Autocomplete
- Functions



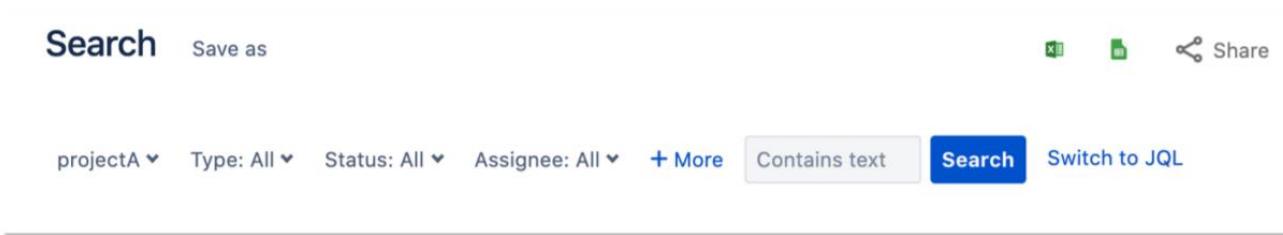
# Basic and advanced/JQL Search

basic

Search Save as

X E Share

projectA Type: All Status: All Assignee: All + More Contains text Search Switch to JQL



advanced/JQL

Search Save as

E Share Export

project = PROJ order by lastViewed DESC

?

Search Switch to basic

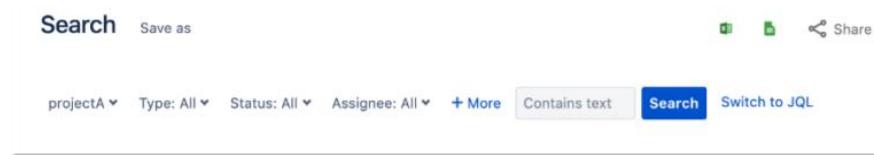


All issues Save as

order by created DESC

Jira Query Language (JQL)- Searches for issues and orders results

# Basic vs. advanced/JQL Search



A screenshot of a search interface. At the top, it says "Search" and "Save as". Below that is a toolbar with icons for file operations like "New", "Open", "Save", and "Share". Underneath the toolbar, there are dropdown filters: "projectA", "Type: All", "Status: All", "Assignee: All", and a "+ More" button. There is also a text input field labeled "Contains text" and a blue "Search" button. To the right of the search button is a link "Switch to JQL".

## Basic search

- User-friendly interface
- Queries can be complex, but there



## Advanced/JQL search

- Uses JQL
- Most powerful search method
- JQL can be used in automation scripts

# Writing “JQL” the easiest way

A screenshot of a search interface. At the top left, there are dropdown filters for 'projectA' (selected), 'Type: All', 'Status: All', 'Assignee: All', '+ More', 'Contains text', and a 'Search' button. To the right of the search button is a link 'Switch to JQL'. A large red arrow points from the 'Switch to JQL' link to the results panel on the right. The results panel shows the query 'project = PROJ ORDER BY created DESC' with a green checkmark icon. Below the query, it says '1-6 of 6'.

# The two main parts of JQL query

 **project = PROJ order by created DESC**

search clause - selects a  
subset of issues

order by clause - orders the  
results

# The Simplest JQL Query



All issues — Edited Save as ▾

1-29 of 29 ⏪ Columns ▾

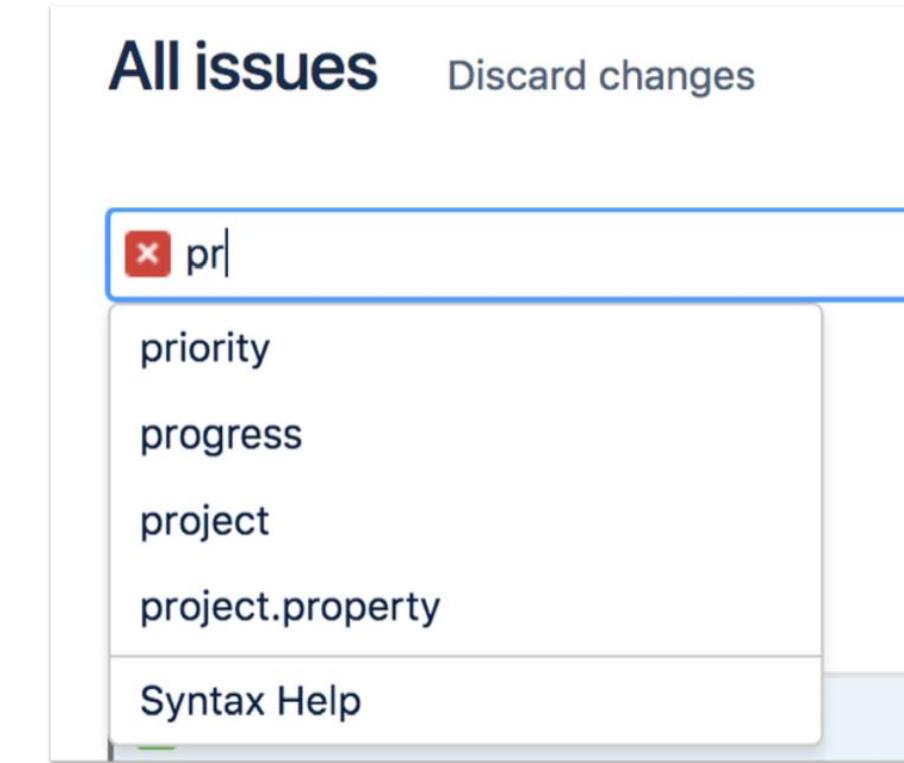
T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due
	SAM-23	As a user, I'd like a historical story to show in reports	Steve Byrnes	Steve Byrnes	↑	DONE	Done	27/May/18	09/Jun/18	...
	SAM-22	As a user, I'd like a historical story to show in reports	Steve Byrnes	Steve Byrnes	↑	DONE	Done	27/May/18	07/Jun/18	
	SAM-21	As a user, I'd like a historical story to show in reports	Steve Byrnes	Steve Byrnes	↑	DONE	Done	27/May/18	04/Jun/18	
	SAM-20	As a user, I'd like a historical story to show in reports	Steve Byrnes	Steve Byrnes	↑	DONE	Done	27/May/18	02/Jun/18	
	SAM-19	As a user, I'd like a historical story to show in reports	Steve Byrnes	Steve Byrnes	↑	DONE	Done	27/May/18	31/May/18	
	SAM-18	As a user, I'd like a historical story to show in reports	Steve Byrnes	Steve Byrnes	↑	DONE	Done	27/May/18	28/May/18	
	SAM-17	Instructions for deleting this sample board and project are in the description for this issue >> Click the "SAM-17" link and read the description tab of the detail view for more	Steve Byrnes	Steve Byrnes	↑	DONE	Done	10/Jun/18	14/Jun/18	

# Topics

- JQL Overview
- Autocomplete
- Functions



# JQL with autocomplete - fields



# Advanced searching fields reference

The screenshot shows a blue header bar with the Jira Software Support logo, navigation links for 'Get started', 'Documentation', 'Knowledge base', 'Resources', and a search icon. Below the header is a breadcrumb trail: Atlassian Support / Jira Software / Documentation / ... / ... / Advanced searching. To the right are 'Cloud' and 'Server' options. The main content area has a title 'Advanced searching - fields reference'. A paragraph explains what JQL is and how clauses work. Below it is a section titled 'Affected version' with a table of its properties. To the right is a sidebar titled 'On this page' listing various JQL fields.

This page describes information about fields that are used for advanced searching. A field in JQL is a word that represents a Jira field (or a custom field that has already been defined in your Jira applications). In a clause, a field is followed by an operator, which in turn is followed by one or more values (or functions). The operator compares the value of the field with one or more values or functions on the right, such that only true results are retrieved by the clause. Note: it is not possible to compare two fields in JQL.

## Affected version

Search for issues that are assigned to a particular affects version(s). You can search by version name or version ID (i.e. the number that Jira automatically allocates to a version). Note, it is better to search by version ID than by version name. Different projects may have versions with the same name. It is also possible for your Jira administrator to change the name of a version, which could break any saved filters that rely on that name. Version IDs, however, are unique and cannot be changed.

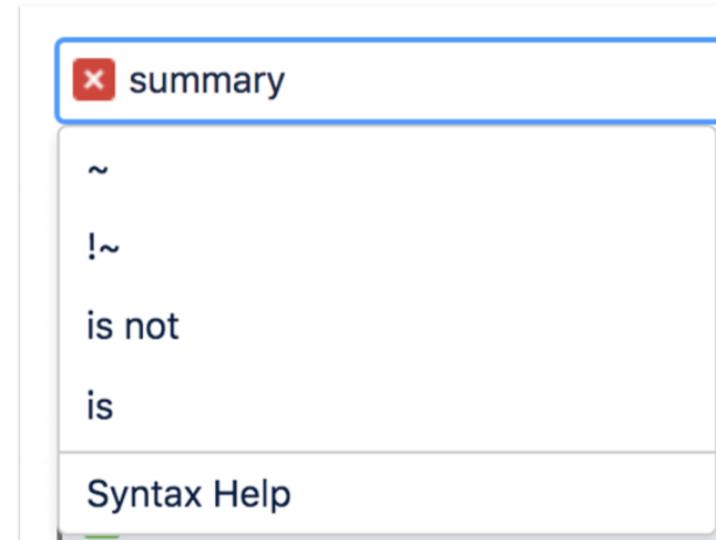
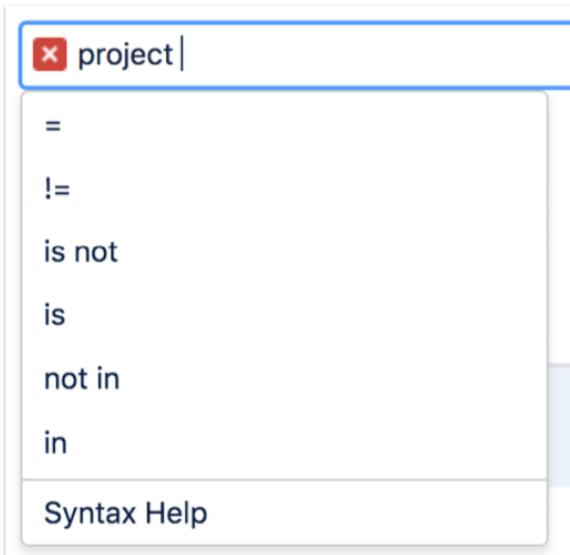
Syntax	affectedVersion
Field Type	VERSION
Auto-complete	Yes
Supported operators	= , != , > , >= , < , <= IS , IS NOT , IN , NOT IN Note that the comparison operators (e.g. ">") use the version order that has been set up by your project

**On this page**

- Affected version
- Approvals
- Assignee
- Attachments
- Category
- Comment
- Component
- Created
- Creator
- Custom field
- Customer Request Type
- Description
- Due
- Environment

# Operator autocomplete

<field name> <operator> <value>  
project = projectA



# Boolean Operators

- **AND**
- **OR**
- **NOT**

```
assignee = currentUser() AND status = "In Progress"

status = "Selected for Development" OR status = "In Progress"
status in ("Selected for Development", "In Progress")

NOT status = Backlog
status != Backlog

find unresolved issues in all projects except SampleA
resolution = Unresolved AND NOT project = SampleA
```

# Advanced searching – operators reference

The screenshot shows a web browser window with the following details:

- Header:** Jira Core Support, Documentation (selected), Resources, Search icon, User icon.
- Breadcrumbs:** Atlassian Support / Jira Core / Documentation / ... / ... / Advanced searching.
- Cloud/Server Selection:** Cloud (selected), Server.
- Section Title:** Advanced searching - operators reference
- Text:** This page describes information about operators that are used for advanced searching. An operator in JQL is one or more symbols or words, which compares the value of a field on its left with one or more values (or functions) on its right, such that only true results are retrieved by the clause. Some operators may use the NOT keyword.
- Section: EQUALS:=**

The "=" operator is used to search for issues where the value of the specified field exactly matches the specified value. (Note: cannot be used with text fields; see the CONTAINS operator instead.)

To find issues where the value of a specified field exactly matches *multiple* values, use multiple "=" statements with the AND operator.

**Examples**

  - Find all issues that were created by jsmith:  
reporter = jsmith
  - Find all issues that were created by John Smith:  
reporter = "John Smith"
- On this page:**
  - EQUALS: =
  - NOT EQUALS: !=
  - GREATER THAN: >
  - GREATER THAN EQUALS: >=
  - LESS THAN: <
  - LESS THAN EQUALS: <=
  - IN
  - NOT IN
  - CONTAINS: ~
  - DOES NOT CONTAIN: !~
  - IS
  - IS NOT
  - WAS

# Executing the query

Search

Save as



Share



Export

project = projectA



Search

Switch to basic

1-6 of 6

Color

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated
<input checked="" type="checkbox"/>	PROJ-6	add item 6	Unassigned	admin	↑	BACKLOG	Unresolved	01/Jul/20	01/Jul
<input checked="" type="checkbox"/>	PROJ-5	add item 5	Unassigned	admin	↑	SELECTED FOR DEV...	Unresolved	01/Jul/20	01/Jul
<input checked="" type="checkbox"/>	PROJ-4	add item 4	Ryan Lee	admin	↑	IN PROGRESS	Unresolved	01/Jul/20	02/Ju

Search

Save as

projectA ▾

Type: All ▾

Status: All ▾

Assignee: All ▾

+ More

Contains text

Search

Switch to JQL

The associated basic search

# Topics

- JQL Overview
- Autocomplete
- Functions



# Search clauses

<field name> <operator> <**field value**>  
project = projectA

<field name> <operator> <**function**>  
assignee = currentUser()



## Advanced searching - functions reference

This page describes information about functions that are used for advanced searching.

A function in JQL appears as a word followed by parentheses, which may contain one or more explicit values or Jira fields. In a clause, a function is preceded by an operator, which in turn is preceded by a field. A function performs a calculation on either specific Jira data or the function's content in parentheses, such that only true results are retrieved by the function, and then again by the clause in which the function is used.



Unless specified in the search query, note that JQL searches do not return empty fields in results. To include empty fields (e.g. unassigned issues) when searching for issues that are not assigned to the current user, you would enter `(assignee != currentUser() OR assignee is EMPTY)` to include unassigned issues in the list of results.

### approved()

*Only applicable if Jira Service Desk is installed and licensed.*

Search for requests that required approval and have a final decision of approved.

### On this page

[approved\(\)](#)

[approver\(\)](#)

[breached\(\)](#)

[cascadeOption\(\)](#)

[closedSprints\(\)](#)

[completed\(\)](#)

[componentsLeadByUser\(\)](#)

[currentLogin\(\)](#)

[currentUser\(\)](#)

[earliestUnreleasedVersion\(\)](#)

[elapsed\(\)](#)

[endOfDay\(\)](#)

[endOfMonth\(\)](#)

# Time based Functions

- startOfDay()
- startOfWeek()
- startOfMonth()
- startOfYear()
- endOfDay()
- endOfWeek()
- endOfMonth()
- endOfYear()
- now()
- currentLogin()
- lastLogin()

Issues created since the start of today

created > startOfDay()

# The unit qualifier

(+|-)nn(y|M|w|d|h|m)

Tip: Use basic search to create the query

**created in the last 2 days (48 hours):**

created > -2d

**created since the start of day 2 days ago:**

created > startOfDay (-2d)

**created since the 15th of this month**

created > startOfMonth (+14d)

# Takeaways

- AJQL query is behind all basic and advanced searches
- Leverage basic queries and autocomplete to simplify creating JQL queries
- JQL queries may select subsets of issues and/or order query results
- Functions can be used to avoid hard-coding values in a search clause
- Time unit qualifiers (yMwdhm) can be used with date-related values

# Lab10-JQL

- Create a basic search and view the JQL query
- Create JQL queries using autocomplete
- Use functions as values

# Filters



# What will you learn?

- Create filters
- Describe board filters
- Use quick filters

# Topics

- Filters
- Board filters
- Quick filters



# Filters

Filters

Search issues

OTHER

My open issues

Reported by me

All issues

Open issues

Done issues

Viewed recently

Created recently

Resolved recently

Updated recently

[View all filters](#)

## My open issues

Save as

assignee = currentUser() AND resolution = Unresolved order by updated DESC

[?](#) [Search](#) [Switch to basic](#) [≡](#)

1-1 of 1 [S](#)

Columns [▼](#)

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated <a href="#">▼</a>	Due
	PRJ-1	add item 1	admin	admin	↑	TO DO	Unresolved	01/Jul/20	02/Jul/20	<a href="#">...</a>

1-1 of 1 [S](#)

# Saving a search creates a filter

The screenshot shows a Jira search interface. On the left, a sidebar lists various filters: Filters, Search issues, OTHER, My open issues (which is selected and highlighted in blue), Reported by me, All issues, Open issues, Done issues, Viewed recently, Created recently, Resolved recently, Updated recently, and View all filters. The main area is titled "My open issues". At the top right of this area are "Edited" and "Save as" buttons, with the "Save as" button highlighted by a red box. Below this is a search bar containing the query: "assignee = currentUser() AND statusCategory = "In Progress" order by updated DESC". To the right of the search bar are "Search" and "Switch to basic" buttons. The results table shows one item: PROJ-2 add item 2, assigned to admin, reported by admin, in IN PROGRESS status, unresolved, created on 01/Jul/20, and updated on 02/Jul/20. The table has columns for T (Ticket), Key, Summary, Assignee, Reporter, P (Priority), Status, Resolution, Created, and Updated.

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated
<input checked="" type="checkbox"/>	PROJ-2	add item 2	admin	admin	↑	IN PROGRESS	Unresolved	01/Jul/20	02/Jul/20

# Save the filters

The screenshot shows the Jira interface with a sidebar on the left and a main content area on the right.

**Left Sidebar (Filters):**

- Filters
- Search issues
- OTHER
- My open issues** (highlighted)
- Reported by me
- All issues
- Open issues
- Done issues
- Viewed recently
- Created recently
- Resolved recently
- Updated recently
- View all filters

**Main Content Area:**

**Section Title:** My open issues — Edited Save as ▼

**Filter Query:** assignee = currentUser() AND statusCategory = "In Progress" order by updated DESC

**Table View (Left):**

T	Key	S
<input checked="" type="checkbox"/>	PROJ-2	a

1-1 of 1 S

**Table View (Right):**

OGRESS		
1-1 of 1 <span style="color: #808080;">S</span>		

**Modal Dialog (Save Filter):**

**Title:** Save Filter

**Form Fields:**

- Filter Name \*:
- Enter a name for this Filter

**Buttons:** Submit (blue button) | Cancel

# The newly created filter

The screenshot shows the Jira interface with a sidebar on the left and a main content area on the right.

**Left Sidebar:**

- Filters
- Search issues
- STARRED**
- My in progress** (highlighted with a red arrow)
- OTHER
- My open issues
- Reported by me
- All issues
- Open issues
- Done issues
- Viewed recently
- Created recently
- Resolved recently
- Updated recently
- 
- View all filters

**Main Content Area:**

**Filter Title:** My in progress

**Filter Description:** assignee = currentUser() AND statusCategory = "In Progress" ORDER BY updated DESC

**Buttons:** Save as, Details, Share, Export, ...

**Table:**

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due
<input checked="" type="checkbox"/>	PROJ-2	add item 2	admin	admin	↑	IN PROGRESS	Unresolved	01/Jul/20	02/Jul/20	...

# Edit filter details

The screenshot shows the Jira interface with a sidebar on the left containing various filters like 'Search issues', 'STARRED', and 'My in progress'. The main area displays the 'My in progress' filter details. A red arrow points from the 'Details' link in the top right of the filter card to the 'Edit filter' dialog box on the right.

**My in progress** Save as Details

**A** Owned by admin

**Permissions**  
This filter is only visible to you.  
[Edit permissions](#)

**Subscriptions**  
This filter has no subscriptions.  
[New subscription](#)

**Filter Subscription**

**Recipients**: Personal Subscription

**Schedule**: Daily

**Interval**: once per day at 9:00 am

The timezone is the same as your profile's timezone - (GMT+00:00), GMT

Email this filter, even if there are no issues found

**Save** **Cancel**

# View all filters

Filters

Search issues

STARRED

My in progress

OTHER

My open issues

Reported by me

All issues

Open issues

Done issues

Viewed recently

Created recently

Resolved recently

Updated recently

[View all filters](#)

## Filters

Name *	Owner	Project	Group	Starred by:
Filter for PRJ board	A admin	projectB, All roles	0 people	***
Filter for PROJ board	A admin	projectA, All roles	0 people	***
My in progress	A admin	Private	1 person	***

[Create filter](#)

[Manage subscriptions](#)

[Copy filter](#)

[Edit](#)

[Delete](#)

# Edit filters query

Filters

Search issues

STARRED

My in progress

OTHER

My open issues

Reported by me

All issues

Open issues

Done issues

Viewed recently

Created recently

Resolved recently

Updated recently

[View all filters](#)

## My in progress

Edited Save Details

assignee = currentUser() AND statusCategory = "In Progress" ORDER BY updated ASC

Search Switch to basic

1-1 of 1

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated ↑	Due
<input checked="" type="checkbox"/>	PROJ-2	add item 2	admin	admin	↑	IN PROGRESS	Unresolved	01/Jul/20	02/Jul/20	...

1-1 of 1

# Topics

- Filters
- Board filters
- Quick filters



# Board filters

- Every board has a filter that defines the issues shown on the board
- You can edit the board's filter
- If you create a board, you must assign it a filter

## Filter

Saved Filter

Filter for PRJCT board

[Edit Filter Query](#)

Filter Query

project = PRJCT ORDER BY Rank ASC

# Example Board filter

A board filter can be used to show issues from multiple projects on a single board

## Filter

- Saved Filter
- Two Projects
- Edit Filter Query

Shares

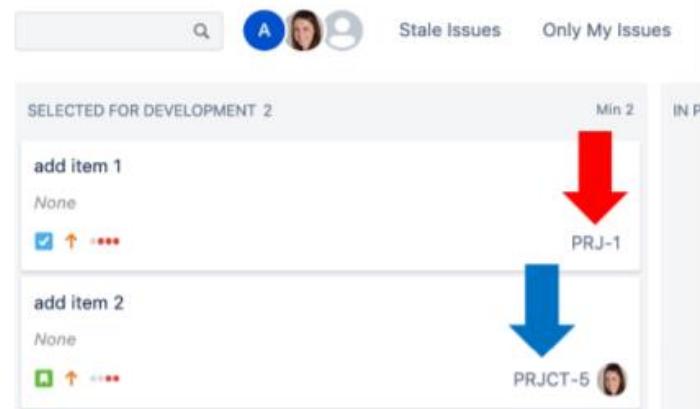
No shares

Edit Filter Shares

Filter Query

project in (PRJCT, PRJ) ORDER BY Rank ASC

## Kanban board



# Topics

- Filters
- Board filters
- Quick filters



# Filtering a board: quick filters

Further filters issues displayed on a board

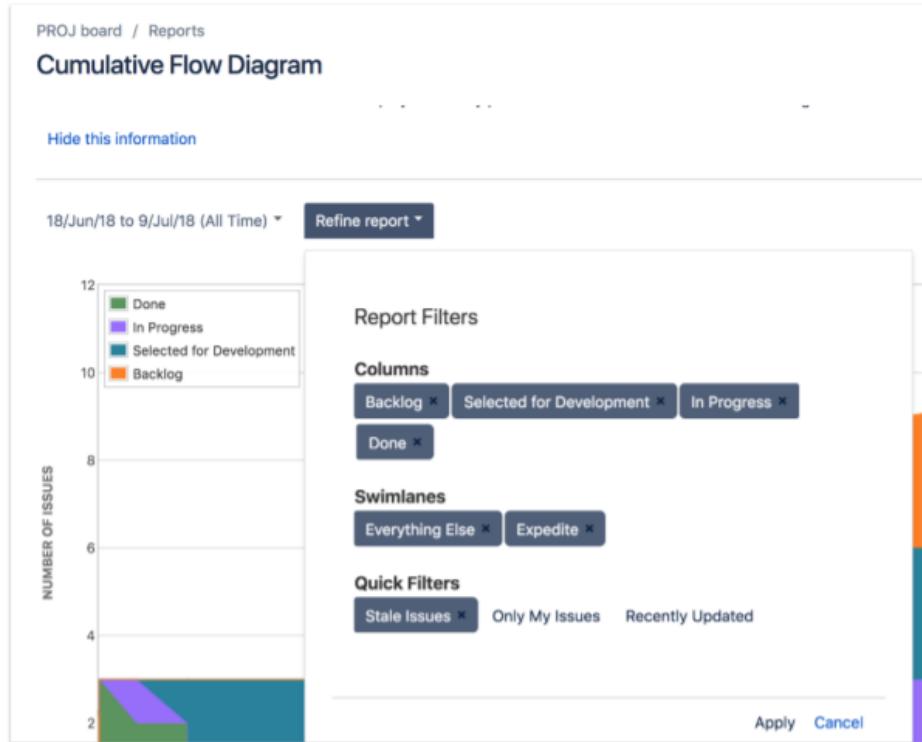
Projects / projectA / PROJ board

## Kanban board

The screenshot shows a Jira Kanban board titled "Kanban board" under "Projects / projectA / PROJ board". The board has three columns: "SELECTED FOR DEVELOPMENT" (2 items), "IN PROGRESS" (2 items), and "REVIEW" (0 items). Each item card contains a title, a checkmark icon, a move-up/move-down icon, and a project identifier (PROJ-3, PROJ-2, PROJ-5, PROJ-4). At the top of the board, there is a search bar, a user profile icon (A), and three filter buttons: "Only My Issues", "Recently Updated", and a button with a question mark icon. A red box highlights the search bar and the filter buttons.

Column	Item 1	Item 2
SELECTED FOR DEVELOPMENT	add item 3 PROJ-3	add item 2 PROJ-2
IN PROGRESS	add item 5 PROJ-5	add item 4 PROJ-4
REVIEW		

# Quick filters and report



# Takeaways

- Filters are saved searches that can be exposed through user interface elements
- Every board has a filter that defines the issues shown on the board
- Quick filters are saved searches that are used to further limit the issues displayed on a board or in reports

# Lab 11- Filters

- Explore default filter queries
- Create a starred filter
- Explore and create quick filters

# Epics



# What will you learn?

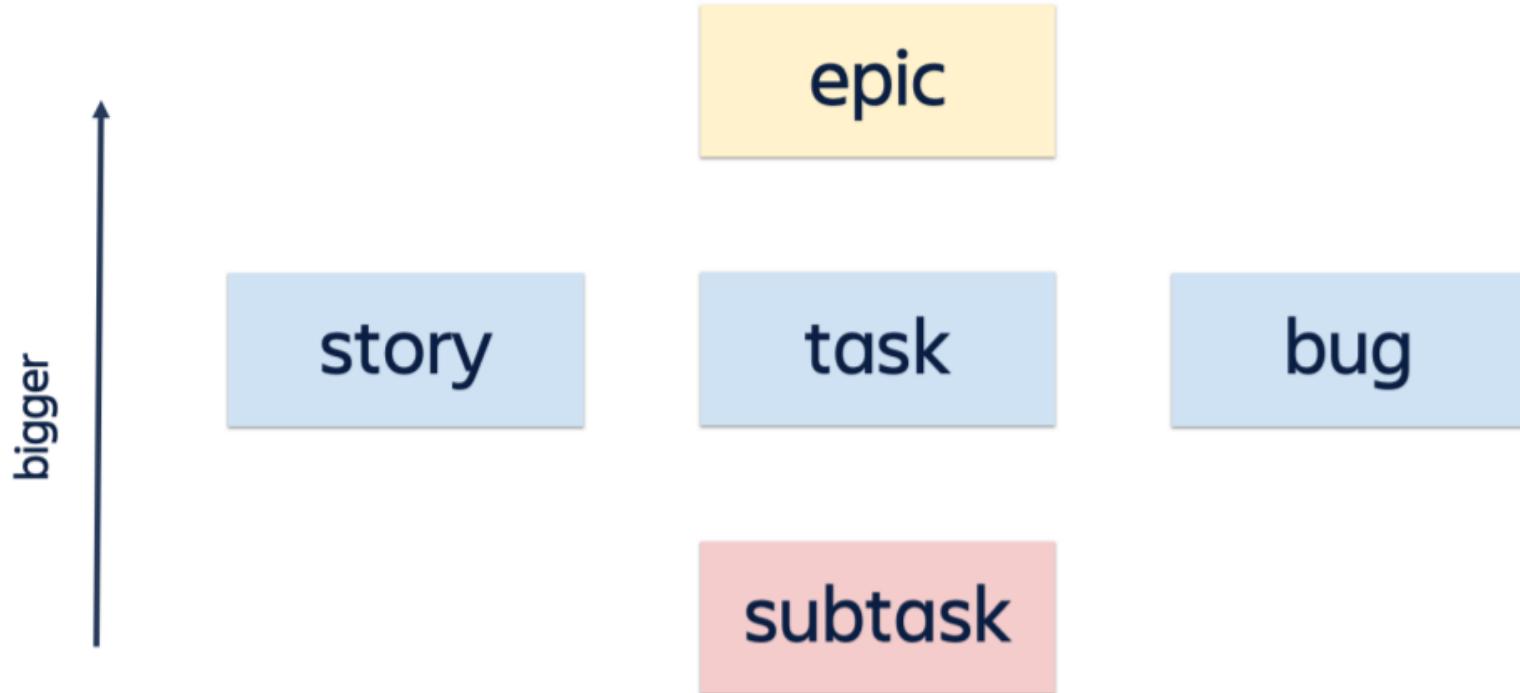
- Describe epics
- Work with epics
- Manage epics in the backlog

# Topics

- Epics overview
- Working with epics
- Epics in the backlog



# Jira's issue type hierarchy



# Epics

- A large issue
- Can contain other issues
- Child issues can span multiple iterations, projects, teams and boards
- Can be a placeholder for many stories

Create issue

Import issues Configure fields ▾

Project\* projectA (PROJ)

Issue Type\* Epic

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

Epic Name\* Big Feature A

Provide a short name to identify this epic.

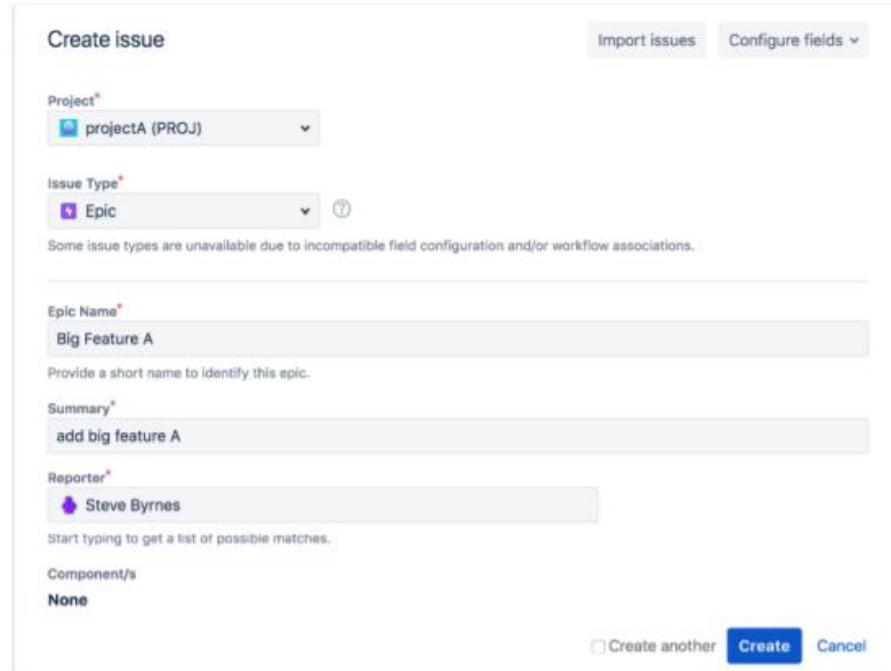
Summary\* add big feature A

Reporter\* Steve Byrnes

Start typing to get a list of possible matches.

Component/s None

Create another Create Cancel



# Why Epics?

- Organization of work
- Span multiple iterations and projects
- Simplifies backlog (one issue)

# Topics

- Epics overview
- **Working with epics**
- Epics in the backlog



# Creating an epic

### Create issue

[Import issues](#)
[Configure fields](#) ▾

---

**Project\***

projectA (PROJ) ▾

**Issue Type\***

Epic ▾

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

---

**Epic Name\***

Feature A

Provide a short name to identify this epic.

**Summary\***

add feature A

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

---

**Components**

**None**

**Attachment**

Drop files to attach, or browse.

**Description**

Style ▾

B I U A    ~~A~~   |

Create another
**Create**
[Cancel](#)

# Managing the issue of an epic

The screenshot shows a Jira issue page for an epic titled "add feature A".

**Header:** PROJ-7, Give feedback, 1, ... X

**Section: add feature A**

- Buttons: Attach, Create issue in epic, Link issue, ...
- Description: Add a description...
- Assignee: Unassigned
- Reporter: admin

**Section: Issues in this epic**

- PROJ-8 add feature A task 1 (checkbox checked, orange arrow pointing up, BACKLOG button)

**Comment Section:**

- Add a comment... (with a placeholder for pressing M to comment)
- Feature A
- Story Points: None
- Original Estimate: 0m

# Epic link

A field in the child issue pointing to the parent epic

The screenshot shows a Jira interface with two main components. On the left is a task card for "add feature A task 1" under "PROJ-7 / PROJ-B". The card includes fields for Description, Activity (Comments selected), and a comment input area. On the right is a larger epic card for "Feature A" under "Backlog". The epic card displays fields for Assignee (Unassigned), Reporter (admin), and Labels (None). A vertical line connects the "Link issue" button in the task card to the "Epic Link" section in the epic card.

PROJ-7 / PROJ-B

add feature A task 1

Attach Create subtask Link issue ...

Description  
Add a description...

Activity  
Show: Comments History Work log

Add a comment...  
Pro tip: press M to comment

Backlog

Assignee  
Unassigned

Reporter  
admin

Labels  
None

Epic Link

Feature A

Created 6 minutes ago Updated 6 minutes ago Configure

# Adding an existing issue to an epic

Open the child issue and select the existing epic under Epic Link

The screenshot shows a Jira issue creation interface for 'add item 2'. At the top left is a checked checkbox labeled 'PROJ-2'. On the right are standard Jira navigation icons: 'Give feedback', a '1' in a circle, a share icon, three dots, and a close button.

The main area has a title 'add item 2' and several buttons: 'Attach', 'Create subtask', 'Link issue', and three dots. Below this is a 'Description' section with a text input placeholder 'Add a description...'. To the right of the description are fields for 'Assignee' (set to 'admin'), 'Reporter' (set to 'admin'), and 'Labels' (set to 'None').

Under the 'Activity' section, there are tabs for 'Comments' (which is selected), 'History', and 'Work log'. A comment input field contains 'Add a comment...' and a note 'Pro tip: press M to comment'. A large red arrow points from the text 'Select Epic' in the 'Epic Link' dropdown menu to the 'Epic Link' heading.

The 'Epic Link' dropdown menu is open, showing a single option: 'Feature A PROJ-7'.

# Searching for issues of an epic

## Search

Save as

 "Epic Link" = PROJ-7

Feature A - (PROJ-7)

Feature A - (PROJ-7)

Syntax Help

T Key Summary

Assignee Reporter

PROJ-8 add feature A task 1

Unassigned admin

1-1 of 1 ⌂

# Epics labels on a board

Projects / projectA / PROJ board

## Kanban board

The screenshot shows a Jira Kanban board titled "Kanban board" for "projectA / PROJ board". The board has three columns: "BACKLOG 3", "SELECTED FOR DEVELOPM... 2", and another column partially visible. In the "BACKLOG 3" column, there are two cards:

- A card titled "add feature A" with a sub-task "Feature A". This card has a red arrow pointing to it from the left.
- A card titled "add feature A task 1" with a sub-task "Feature A". This card also has a red arrow pointing to it from the left.

In the "SELECTED FOR DEVELOPM... 2" column, there are two cards:

- A card titled "add item 3" with a sub-task "PROJ-3".
- A card titled "add item 5" with a sub-task "PROJ-5".

The board includes a search bar, user profile icons, and a filter for "Only My Issues".

# Epic based swimlanes

Projects / projectA / PROJ board

## Kanban board

Only My Issues   Recently Updated

BACKLOG 3

SELECTED FOR DEVELOPM... 2

IN PROGRESS 2

▼ Feature A 1 issue

add feature A task 1

Feature A



PROJ-B

▼ Issues without epics 6 issues

add item 6



PROJ-6

add item 3



PROJ-3

add item 2



PROJ-2

add item 5

add item 4



# Topics

- Epics overview
- Working with epics
- **Epics in the backlog**



# Creating an epic from a backlog

Projects / projectB / PRJ board

## Backlog

The screenshot shows a Jira backlog interface. At the top, there is a navigation bar with 'Projects / projectB / PRJ board' and a search bar. Below the navigation is a header with 'Backlog' and user profile icons. A red arrow points upwards from the bottom of the 'VERSIONS' dropdown menu towards the 'Create epic' button. The 'VERSIONS' dropdown has two options: 'EPICS' and 'All issues', with 'All issues' currently selected. To the right of the dropdown is a 'Create epic' button and an 'X' button. Below the dropdown, there is a section titled 'PRJ Sprint 1' which contains 2 issues. This section includes a description: 'Create the first product increment.' and a date range: '01/Jul/20 4:38 PM - 15/Jul/20 4:38 PM'. There is also a '...' button next to the sprint title. Below this section is a 'Backlog' section containing 1 issue, with a 'Create issue' button at the bottom.

VERSIONS

EPICS Create epic X

All issues

PRJ Sprint 1 2 issues

Create the first product increment.  
01/Jul/20 4:38 PM - 15/Jul/20 4:38 PM

A ...

add item 1

add item 2

Backlog 1 issue

add item 3

+ Create issue

# Epics panel

Can monitor the status of issues in the epic

Projects / projectB / PRJ board

## Backlog

The screenshot shows the Jira Backlog interface for the 'PRJ board' under 'projectB'. At the top, there are filters for 'Only My Issues' and 'Recently Updated'. A red box highlights the 'EPICS' section on the left, which contains a search bar, user profile, and buttons for 'Create epic' and 'X'. Below this, it lists 'All issues' and a specific epic named 'feature B' (PRJ-4 add feature B). The epic details show 3 Issues, 2 Completed, 0 Unestimated, and an Estimate of 6. It also includes links to 'Create issue in epic' and 'View linked pages'. To the right, the backlog is organized by sprint: 'PRJ Sprint 1' (2 issues), 'PRJ Sprint 2' (1 issue), and 'Backlog' (1 issue). Each item in the backlog has a 'Create issue' button.

EPICS Create epic X

All issues

feature B  
PRJ-4 add feature B

Issues 3

Completed 2

Unestimated 0

Estimate 6

Create issue in epic

View linked pages

Issues without epics

PRJ Sprint 1 2 issues

0 0 3 Linked pages 0 ...

Create the first product increment.  
01/Jul/20 4:38 PM × 15/Jul/20 4:38 PM

A ...

add item 1 feature B PRJ-1 ↑ 1

add item 2 feature B PRJ-2 ↑ 2

Backlog 1 issue Create sprint ...

add item 3 feature B PRJ-3 ↑ 3

+ Create issue

# Mark an epic as done

An epic marked as done will be removed from the epics panel

Projects / projectB / PRJ board

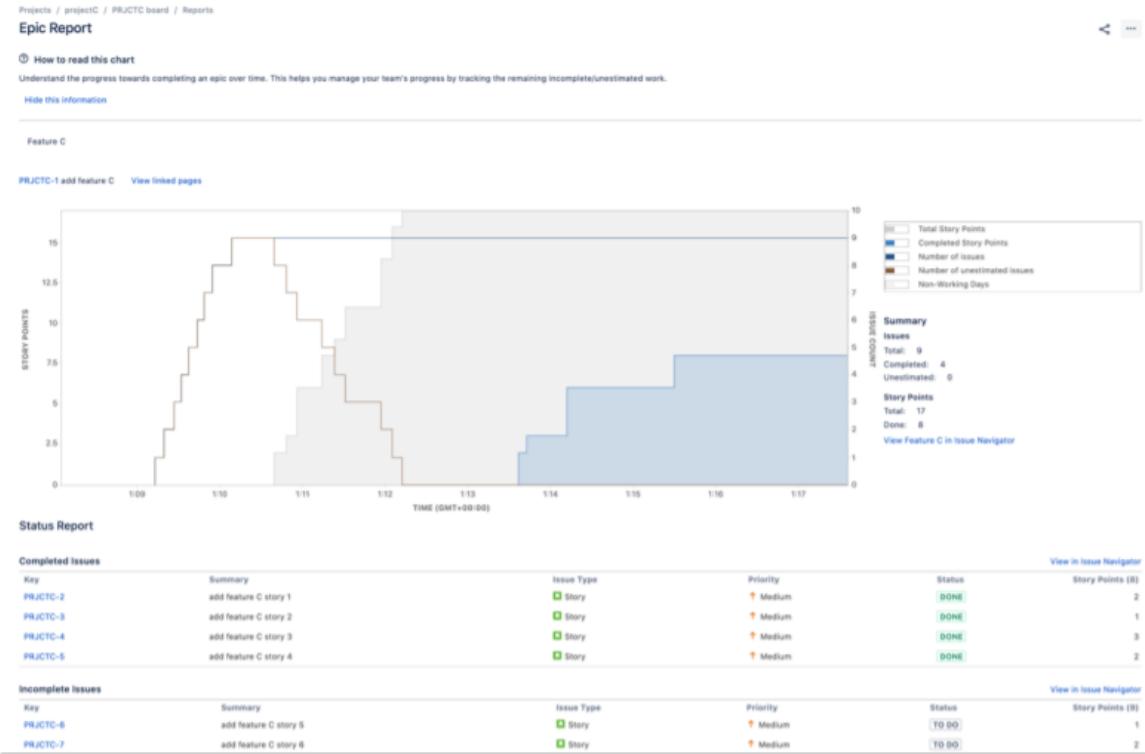
## Backlog

The screenshot shows a Jira backlog interface. At the top, there's a search bar, a user icon (A), and navigation links for 'Only My Issues' and 'Recently'. Below this is a modal window titled 'EPICS' with a close button 'x'. The modal contains a dropdown menu set to 'All issues', a color palette, and several buttons: 'Edit name', 'View epic details', and a prominent 'Mark as Done' button which is highlighted with a red border. To the left of the modal, there's a sidebar with 'VERSIONS' and a list of epic cards:

- feature B (PRJ-4 add feature B)
- Issues: 3
- Completed: 3
- Unestimated: 0
- Estimate: 6

Below the sidebar are buttons for 'Create issue in epic' and 'View linked pages'. At the bottom of the sidebar, it says 'Issues without epics'.

# Epics Report



# Scrum - Epics burndown report



# Takeaways

- An epic is a large issue of issue type "epic" that may contain other issues
- The "Epic Link" field is used to associate Issues with an epic
- Epics can be shown on boards or in backlogs

# Lab12- Epics

- Create an issue of type
- Add issues to the epic
- View swimlanes by epic
- View the epic in the Kanban backlog
- Complete an epic

# Dashboards



# What will you learn?

- Describe dashboards
- Configure a dashboard
- Display a dashboard as a wallboard

# Visualizing work



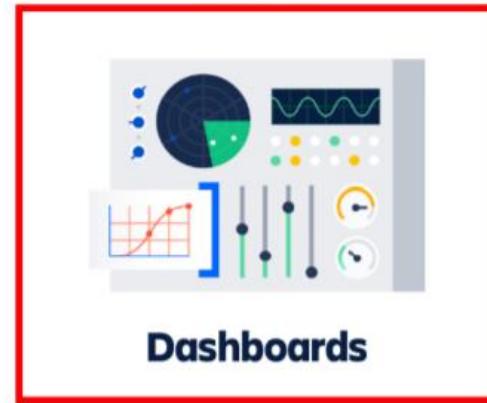
**Boards**



**Reports**



**Search**



**Dashboards**

# Dashboards

The dashboard consists of two main sections. The left section, titled "Alana's dashboard", contains a "Sprint Health Gadget" for "PROJB Sprint 3 - PROJB board". It displays the "Overall sprint progress (Story Points)" at 5, with 5 days left. Below this, under "Assignees in Sprint", there is a small profile picture of a person. The right section contains a "Sprint Burndown Gadget" showing a burndown chart from Nov 3 to Nov 9. The y-axis is "STORY POINTS" (0 to 6) and the x-axis is "TIME". A legend indicates "Guideline" (blue line), "Remaining Values" (red line), and "Non-Working Days" (light gray area). The burndown chart shows a steady decline from 6 points on Nov 3 to 0 points by Nov 9. The right section also features an "Activity Stream" for "Your Company JIRA". It lists several recent activity items from "Alana Grant":

- updated the Sprint of PROJB-6 - add item 8 (1 minute ago)
- updated the Sprint of PROJB-7 - add item 7 (1 minute ago)
- updated the Story Points of PROJB-7 - add item 9 (1 minute ago)
- created PROJB-7 - add item 9 (2 minutes ago)
- updated the Story Points of PROJB-6 - add item 8 (2 minutes ago)

A "Show more..." button is visible at the bottom of the stream.

- Configurable view of the work of one or more projects
- Can be personal or shared
- Contains gadgets

# Types of Gadgets

## Add a gadget

Search

CATEGORIES

All	31
Charts	8
Jira	27
Other	3
Wallboard	7

Discover powerful apps compatible with your JIRA version via the Atlassian Marketplace.

The screenshot shows the Atlassian Marketplace interface. At the top, there's a search bar and dropdown menus for 'Staff-picked', 'Dashboard gad...', and 'All paid & free'. A red box highlights the 'Dashboard gad...' dropdown. Below the search bar, there are two app cards:

- Xray Test Management for Jira** by Xpand IT (Top Vendor). It has a 4-star rating (231 reviews), 6,562 installations, and a price of \$2500. It's categorized under CUSTOM FIELDS, DASHBOARD GADGETS, JIRA SERVICE DESK, TESTING & QA, and REPORTS. The description states: "Xray is a Jira App for managing quality assurance tests which integrates seamlessly with Jira. Xray supports manual and automated tests and provides reports to track test coverage of your Jira projects. Xray includes a RESTful API out of the box."
- Arsenale Dataplane - Jira Reports** by Arsenale (Top Vendor). It has a 3.5-star rating (55 reviews), 1,142 installations, and a price of \$1250. It's categorized under CHARTS & DIAGRAMMING, DASHBOARD GADGETS, PROJECT MANAGEMENT, and REPORTS. The description states: "Dataplane delivers powerful, intuitive Jira reports and metrics for managers. Dozens of built-in reports; save, share and subscribe to reports; display on dashboards; export to PDF and Excel."

- Contains more dashboard gadgets
- Select “Dashboard gadgets”

# Adding gadgets

Add gadget   Edit layout   ...

**Add a gadget**

Search

CATEGORIES

- All 31
- Charts 8
- Jira 27
- Other 3
- Wallboard 7

**Activity Stream**  
By Atlassian + Local  
Lists recent activity in a single project, or in all projects.  
[Show XML link](#) [Add gadget](#)

**Agile Wallboard Gadget**  
By Atlassian + Local  
Displays a board as a Wallboard gadget  
[Show XML link](#) [Add gadget](#)

**Assigned to Me**  
By Atlassian + Local  
Displays all unresolved issues assigned to me  
[Show XML link](#) [Add gadget](#)

**Average Age Chart**  
By Atlassian + Local  
Displays the average number of days issues have been unresolved.  
[Show XML link](#) [Add gadget](#)

# Configuring a gadget

The screenshot shows a configuration dialog for a 'Sprint Health Gadget'. At the top, it says 'Sprint Health Gadget'. Below that, there are dropdown menus for 'Board' (set to 'PROJB board') and 'Sprint' (set to 'Next Sprint Due (auto)'). Under these, there are three checked checkboxes: 'Show board name', 'Show sprint name', and 'Show assignees'. At the bottom, there is an 'Auto refresh' section with a checkbox for 'Update every 15 minutes'. At the very bottom are 'Save' and 'Cancel' buttons.

Minimize

Delete

Edit

Sprint Health Gadget

Board PROJB board

Show board name

Show sprint name

Show assignees

Sprint Next Sprint Due (auto)

Auto refresh  Update every 15 minutes

Save Cancel

# Sharing Dashboards

The screenshot shows a user interface for managing a dashboard. At the top right, a context menu is open with options: Add gadget, Edit layout, Copy Dashboard, Edit Dashboard, Share Dashboard (which is highlighted in blue), Delete Dashboard, Find Dashboards, Create Dashboard, View as wallboard, View wallboard slideshow, and Set up wallboard slideshow.

The main form contains the following fields:

- Name: Team Sprint Dashboard
- Description: (empty)
- Favorite: (no star icon)
- Shares: Not shared
- Add Shares: Project (dropdown), Teams in Space (dropdown), Shared with everyone with permission to browse the 'Teams in Space' project.
- Sharing dropdown (opened from the 'Add Shares' button):
  - All (selected, checked)
  - Project Roles
  - Administrators
  - Developers
  - Users

At the bottom are Update and Cancel buttons.

# Wallboards

- Turn any dashboard into a wallboard
- Acts as an information radiator

The screenshot shows a Jira dashboard titled "Sample Sprint 2" with the subtitle "0 days left". The dashboard features a Gantt chart at the top left, followed by four large progress bars: "Time elapsed" (100%), "Work complete" (43%), "Scope change" (55%), and "Blockers" (0). Below these are two tables: "Stories to be triaged" and "Untriaged bugs". The "Stories to be triaged" table lists various stories with their names and percentages. The "Untriaged bugs" table lists bugs with their names and percentages. To the right of the dashboard is a context menu with the following options: Add gadget, Edit layout, ..., Copy Dashboard, Edit Dashboard, Share Dashboard, Delete Dashboard, Find Dashboards, Create Dashboard, View as wallboard (which is highlighted in blue), View wallboard slideshow, and Set up wallboard slideshow.

# Takeaways

- Dashboards display the work of projects
- Dashboards can be shared or used personally
- Gadgets display a portion of a dashboard
- Dashboards can be shown as a wallboard to radiate information

# Lab 13 - Dashboards

- Create a dashboard
- Display a dashboard as a wallboard

# Putting it all together



# Topics

- Course overview
- Jira family
- Wrap up



# Combined lean and agile principles

## 1. Empower the team

- Select motivated individuals
- Teams should self-organize
- Collaborate to create shared understanding

## 2. Visualize work

## 3. Experiment using the scientific method

- Continuously learn and improve
- Embrace change
- Partner with the customer
- Continuously inspect and adapt

## 4. Plan, develop and deliver incrementally

- Prefer conversations for conveying information
- Continuously refactor to maintain agility
- Maintain a sustainable pace
- Completed work items are the primary measure of progress
- Obtain fast feedback

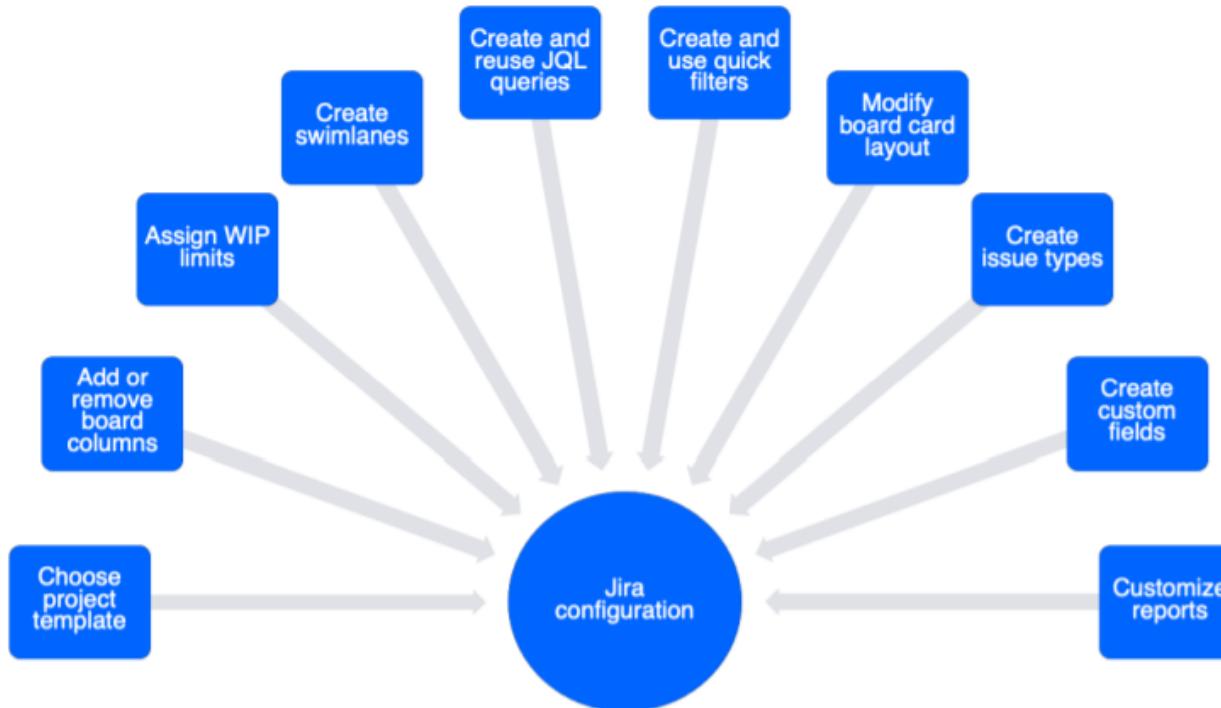
## 5. Improve the "flow" of value

- Limit work in progress
- Map the value stream
- Pull work
- Eliminate waste
- Reduce setup times
- Automate what should be automated
- Continuously strive for simplicity

## 6. Build quality in

- Don't compromise on quality
- The process should identify problems
- Fix problems when they are discovered
- Identify and fix the root cause

# Ways to configure Jira to match your team's process



# Topics

- Course overview
- Jira family
- Wrap up



# Jira family of products



**Jira Core**  
Business project management  
software

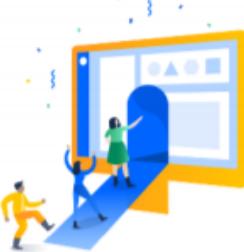


**Jira Software**  
Plan, track, and release  
software



**Jira Service Desk**  
Service desk software for IT  
teams

## Onboarding



## Tasks



Create email account



Acquire Laptop



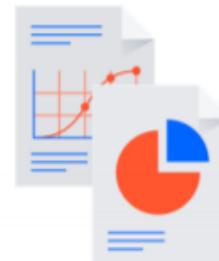
Video chat with new employee



Jira Core

Create & manage

Track progress



## Mobile App Development



Manage backlog



Backlog



Jira Software



Manages board



Board



Monitor pull requests



Code Repository



Customer



Customer  
Portal



Jira Service Desk

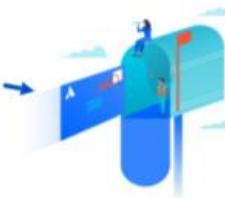


Customer

Creates  
Request



Knowledge Base



Customer  
Communication



Request Queues

# Lab 14- Final project (optional)

- Modify a Jira project to match your team's ever-changing agile processes

# Topics

- Course overview
- Jira family
- Wrap up



# Congratulations on completing the course!

