DRAFT - Jira Advanced Planning Runbook

Documentation

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2 Overview

Jira provides several methods to help organize and deliver project information at the Epic level. Jira Plans serve as a source of truth for the progress of a given project or initiative.

This document shows you how to use custom filters and Jira's Advanced Planning feature[1] to provide greater visibility into a project.

This page also describes how to export Jira data to Google Sheets. Exporting Jira data can increase communication and collaboration across multiple teams.

To take full advantage of these tools, you will learn to:

1. Create custom filters for your Jira data.
2. Use Jira Advanced Planning to create a plan based off those filters or other issue sources.
3. Export Jira data into a Google Sheet.

1 https://www.atlassian.com/software/jira/guides/advanced-roadmaps/overview#what-is-advanced-planning

3 Project Plans

Project Plans use custom filters to surface details about Epics related to a specific project.

This section shows you how to create a new custom filter and use it as the issue source for a new Project Plan.

3.1 Creating a Custom Filter

Before you create a Project Plan, you need to create and save a filter that's appropriate for the plan's intended audience:

- For a Project Plan that provides a high-level overview of project Epics, create a Project Overview filter (see page 6).
- For a Project Plan that provides more details about a project's active and unfinished tickets, regardless of issue type, create a Project Planning filter (see page 6).

1. Select **Issues** > **Search for issues**.
2. Enter a Project Overview (see page 6) or Project Planning (see page 6) filter into the search box, replacing values when necessary.

   > If you do not see a search box, select **Advanced** to swap search modes.

3. Select **Search**.
4. After reviewing the results, select **Save as**.
5. Enter a **Filter Name** using the format *projectName Tickets*.
   For example: projectAlexandria Tickets
6. Select **Save**.

After you create the filter, you need to change its access level to make sure it is visible to everyone. To do so:

1. While viewing your filter's results, select **Details**.
2. Select **Edit permissions**.
3. Select **Any logged-in user** from the Add Viewers dropdown.
4. Select **Add**.
5. Select **Save**.

3.2 Creating a Project Plan

1. Select **Plans** > **Create...**
2. Select **Plan** then select **Create**.
3. Enter the **Plan name** and set the **Access level**.
4. Choose **Filter** as your Issue source and select the saved filter to use.
5. Select **Create**.

3.3 Project Overview Filter

The Project Overview filter returns a list of project Epics that include the specified label. Use this filter to create a Project Plan for stakeholders that need to see a timeline of your Epics, but don't necessarily need to see additional tasks or stories associated with those Epics.

Project Overview Filter

```
project = "yourProjectName" AND type = Epic AND labels = yourLabel ORDER BY created
ASC
```

Filter Parameters

- `project` : Replace *yourProjectName* with the full name of your Jira project, or its project key.
- `type` : Use *Epic* as the value for this parameter.
- `labels` : Replace *yourLabel* with any labels that apply to the Epics you want to display.
    - For example, *scheduled* or *process_improvement*.
- `ORDER BY created ASC` : Keep this parameter as-is to prevent issues when exporting and importing data to Google Sheets.

3.4 Project Planning Filter

The Project Planning filter returns every issue in a project with a status from the *To Do* or *In Progress* status categories. Use this filter to create a view that shows a timeline of the requested issues. You can expand Epics on the timeline to view their associated tasks, stories, or sub-tasks.

Project Planning Filter

```
project = "yourProjectName" AND statusCategory in ("To Do", "In Progress") ORDER BY
created ASC
```

Filter Parameters

- `project` : Replace *yourProjectName* with the name of your Jira project.
- `statusCategory` : Use *"To Do"* and *"In Progress"* to make sure you don't show any tickets that are considered complete.
- `ORDER BY created ASC` : Keep this parameter as-is to prevent any potential issues when exporting and importing data to Google Sheets.

If you want to include closed Epics in your Project Plan, use the following filter:

Project Plan with Closed Epics

```
project = "yourProjectName" AND statusCategory in ("To Do", "In Progress") OR project
= "yourProjectName" AND type = Epic ORDER BY created ASC
```

4 Initiative Plans

Initiative Plans visually communicate the development of cross-team and Crunchyroll initiatives.

Before you create an Initiative Plan, you need to save a custom filter and create a new Jira board based on that filter.

4.1 Creating a Custom Filter

1. Select **Issues** > **Search for issues**.
2. Enter one of the following filters into the search box.

   > If you do not see a search box, select **Advanced** to swap search modes.

3. Select **Search**.
4. Select **Save as**.
5. Enter a unique **Filter Name** using the format *initiativeName Tickets*.
   For example: addAuthentication Tickets
6. Select **Save**.

After you create the filter, you need to change its access level to make sure it is visible to everyone. To do so:

1. While viewing your filter's results, select **Details**.
2. Select **Edit permissions**.
3. Select **Any logged-in user** from the Add Viewers dropdown.
4. Select **Add**.
5. Select **Save**.

For an Initiative Plan based on one (1) Epic, use the following filter:

Single Epic Filter

```
issuekey in childIssuesOf(XXX-123) OR id =XXX-123 ORDER BY created ASC
```

For an Initiative Plan based on multiple Epics, use the following filter:

Multiple Epics Filter

```
issuekey in childIssuesOf(XXX-123) OR issuekey in childIssuesOf(XXX-456) OR id in
(XXX-123, XXX-456) ORDER BY created ASC
```

Filter Parameters

- `issuekey in childIssuesOf(XXX-123)` : Returns issues Replace *XXX-123* with the issue ID for your Epic.
- `id =XXX-123` :
- `id in (XXX-123, XXX-456)` :
- `ORDER BY created ASC` : Keep this parameter as-is to prevent issues when exporting and importing data to Google Sheets.

Use the saved filter to create a new Jira board. Afterwards, create an Initiative Plan and set the new Jira board as its issue source.

4.2 Creating a Jira Board

1. Select **Boards** > **View all boards**.
2. Select **Create Board**.
3. Select **Create a Kanban board**.
4. Choose **Board from an existing Saved Filter** and select **Next**.
5. Enter a **Board name**.
6. Select your **Saved Filter**.
7. Select **Create Board**.

4.3 Creating an Initiative Plan

1. Select **Plans** > **Create...**
2. Select **Plan** then select **Create**.
3. Enter the **Plan name** and set the **Access level**.
4. Choose **Board** as your issue source and select the board you created in the previous steps.
5. Select **Create**.

5 Exporting Data From Jira

Exporting Jira data to Google Sheets helps communicate the overall status of your plans to a wider audience, most of whom do not have access to Jira. Additionally, Google Sheets can pull data into relevant cells of a tracking sheet so its owner doesn't need to manually update every change to an issue.

> You can also use this data to build a timeline view in Google Sheets that resembles the timeline views in Jira Plans.

1. Select **Google Sheets** next to the Share icon.
2. On the Google Sheets Export page, select the columns to include in your export.
   The following list represents columns that must be included in every export. Additional columns can be added if necessary.
   Default columns list...
   - Issue Type
   - Project
   - Epic Name
   - Summary
   - Status
   - Labels
   - Start Date
   - End Date
   - Live Date
   - Assignee
   - Reporter
   - Resolved
   - Resolution
   - Created
   - Updated
3. Enter a **Sheet name** using the format *yourProjectName Tickets $DATE $TIME*. The *$DATE* and *$TIME* variables insert the date and time of the export when it runs.
   a. For example, projectAlexandria Tickets $DATE $TIME.
4. Select an **Update schedule** for your export.

> Setting a schedule with very frequent updates may cause performance issues across Jira. Do not set a frequency under six (6) hours.

5. Select **Export** to export the data.
   The export opens in a new browser tab.

5.1 Updating Exported Jira Data

Exported Jira data updates automatically according to a set schedule or when re-exported manually. Ideally, these updates only affect the Jira data and not the organization of the Google Sheet itself. However, if needed, you can change the following characteristics of the export:

- Columns
- Column Order
- Update Schedule

1. Select the custom filter to export from **Issues** > **Filters**. If you don't see your filter:
   a. Select **Issues** > **Manage filters**.
   b. Select **My** in the sidebar.
2. Select **Google Sheets** next to the Share icon.
3. Update the export as needed.

> Do not change the Sheet Name unless you want to create a brand new export.

4. Select **Export** to save your changes and re-export your data.
   The export opens in a new browser tab.

6 Working With Data in Google Sheets

By default, exports contain one (1) sheet named *Data* which contains the raw export from Jira. You need to use other spreadsheets to call and manipulate this data. Adding tabs or extra information to the *Data* sheet may interfere with the Jira export process during updates. If you change the name of the export sheet, make sure to update its name in formulas that reference the export.

6.1 Importing Data With IMPORTRANGE

1. Open the project tracking spreadsheet that will use the imported data.
2. Create and name an empty tab in your spreadsheet.
3. Insert the following formula into cell A1 of the empty tab and update the link to point to the exported *Data* sheet. This mirrors the exported data into your project tracking sheet.
   Setting up the import this way ensures the referenced data will always reflect the most recent export from Jira.

```
=IMPORTRANGE("https://docs.google.com/spreadsheets/yourDataSheet","Data!A:Z")
```

6.2 Referencing Data with VLOOKUP

After importing the raw data into your project tracking sheet, you can use VLOOKUP to create references to your exported data.

To import data into a cell, use a VLOOKUP formula that pulls relevant data from the corresponding section of the exported *Data* sheet. Refer to Google's VLOOKUP documentation[2] for more information on how to use this formula.

Insert the following formula in any cells that will contain referenced data:

```
=VLOOKUP(lookupValue,searchRange,columnIndex,match)
```

Arguments	Type	Description	Example
lookupValue	cell reference	Defines the value to search for in the first column of your search range.	`$B2`

2 https://support.google.com/docs/answer/3093318?hl=en

Arguments	Type	Description	Example
searchRange	range of data	The range of data that contains the lookup value.	`'dataSheet'!$A:$Z`
columnIndex	integer	The column number of the search range to use as a return value.	`4`
match	boolean	Set to *true* for an approximate match, or *false* for an exact match.	`false`

6.2.1 VLOOKUP Example

This section provides an example of how to use VLOOKUP to reference an issue's status from a Jira export.

The following formula is used in cell D2 of the *Project Tracking Sheet*.

Sample formula

```
=VLOOKUP($B2,'Ticket Data'!$A:$I,6,false)
```

Project Tracking Sheet

	A	B	C	D	E	F	G
1	*Release*	*Jira*	*Summary*	*Status*	*Team Lead*	*Start*	*End*
2	v1.4.3	DOC-1410 ①	Video Engineering	Closed ④	e Doe	7/23/2023	10/4/2023
3	v1.4.4	DOC-1411	Video Engineering	Closed	Jane Doe	7/24/2023	10/5/2023
4	v1.4.5	DOC-1412	Video Engineering	Closed	Jane Doe	7/25/2023	10/6/2023

1 Screenshot of a Google Sheets spreadsheet with details of Jira issues

Ticket Data

	A	B	C	D	E	F	G	H	I
1	Issue Key	Issue Type	Project	Epic Name	Summary	Status	Labels	Start date	End date
2	DOC-1410 ②	Story	Documentation	Video Engineering	Video Engineeri	Closed ③		2023/7/23	2023/10/4
3	DOC-1411	Story	Documentation	Video Engineering	Video Engineeri	Closed		2023/7/24	2023/10/5
4	DOC-1412	Epic	Documentation	Video Engineering	Video Engineeri	Closed		2023/7/25	2023/10/6

1. VLOOKUP sets the lookup value from the *Project Tracking* sheet (*DOC-1410*).
    a. It looks in the search range (*Ticket Data* sheet, columns A through I) for that value.
2. An exact match of the lookup value is in the second row of *Ticket Data*. VLOOKUP sets this as the return row.
3. From the return row, VLOOKUP pulls the data in the sixth column of the search range (column F).

4. VLOOKUP returns the pulled data and inserts it into the *Project Tracking* cell (Closed).

7 More Information

- Jira Advanced Planning[3]
- Advanced Search with JQL[4]

3 https://www.atlassian.com/software/jira/guides/advanced-roadmaps/overview#what-is-advanced-planning
4 https://support.atlassian.com/jira-service-management-cloud/docs/use-advanced-search-with-jira-query-language-jql/