



Mark Soekarjo

# Introductions

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- Allereerst: een kort voorstelrondje



# Wie ben ik

Mark Soekarjo trainer/coach/performer

## [Mark Soekarjo]

- Trainer (Eduvision sinds 2000)
- People Lead / HR coach (KPN, Stater, ...)
- Background in Web Design and Research

### ➤ opleidingen

web design, Photoshop, eBusiness, Flash

### ➤ trainingen: jira, confluence, smart photography,

CSS(masterclass), jQuery, Prezi, WordPress,

html5/css3, Bootcamp Front-End, blogging,

Infographics, enz ...

### ➤ veel ervaring in reclame / communicatie



Jira Software  
Confluence



WORDPRESS



aptana  
STUDIO 3.0



W3C®



{less}

eduvision  
opleiding & training

# in-company training

## made to measure



coaching, leadership,  
attitude, professionalism



infographics



CSS 2/3



animation, After Effects



bootcamp Front-End  
Web Techniques



Dienst Justitiële Inrichtingen  
Ministerie van Justitie en Veiligheid

Jira



Marketing and Advertising  
11-50 employees

psd to html/css



Smart Photography,  
feedback



Confluence



Responsive Web Design  
jQuery



Prezi



Photoshop



blogging



Flash



website/CMS management



customizing LMS



WordPress, Flash, Web design



Photoshop

# Dagindeling

Begin training (9:30)	
(korte) pauze (11:00)	<ul style="list-style-type: none"><li>• Water / Koffie / Thee / Fris</li><li>• Toilet</li></ul>
Jira Training	
Lunch (12:30 - 13:00)	
Jira Training	
(korte) pauze (14:30)	<ul style="list-style-type: none"><li>• Water / Koffie / Thee / Fris</li><li>• Toilet</li></ul>
Jira Training	
Einde training (16:30)	



# Agenda

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- Introductions
- Interface
- Projects and teams
- Workflows
- Werken met project boards
- Agile methoden in Jira
  - Scrum
  - Kanban
- Backlog beheren
- Beheren van issues
- Prioriteiten en versies van issues en epics
- Sprint planning
- Loggen van voortgang en tijd
- Beheren van releases
- Integratie met externe software
- Rapportages maken en monitoren
- Best Practices

# Introductions

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- What is your daily job and how is jira a part of it?
  
- What is your reason for taking this course now?
  
- What is the main “take-away” you want to get from this training?

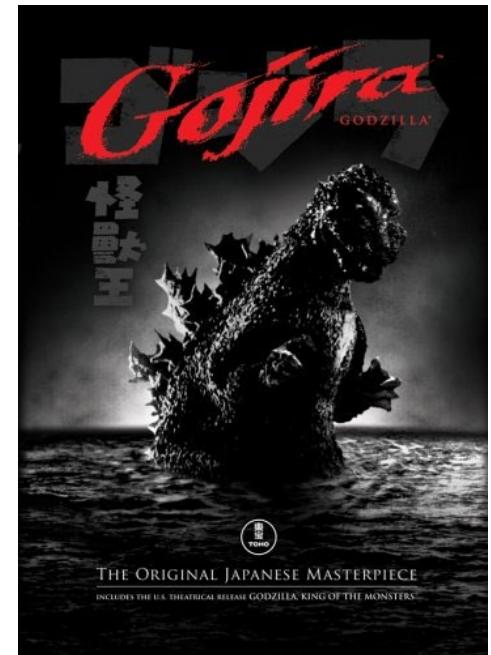
# Introducing jira

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- Jira is Atlassians project management tool used for issue tracking and other management purposes.
- Its name refers to **Gojira**, the Japanese name of Godzilla
- It started out as a bug tracker in 2002 built by 2 CS students in Sydney, Scott Farquhar and Mike Cannon-Brookes



Jira Software



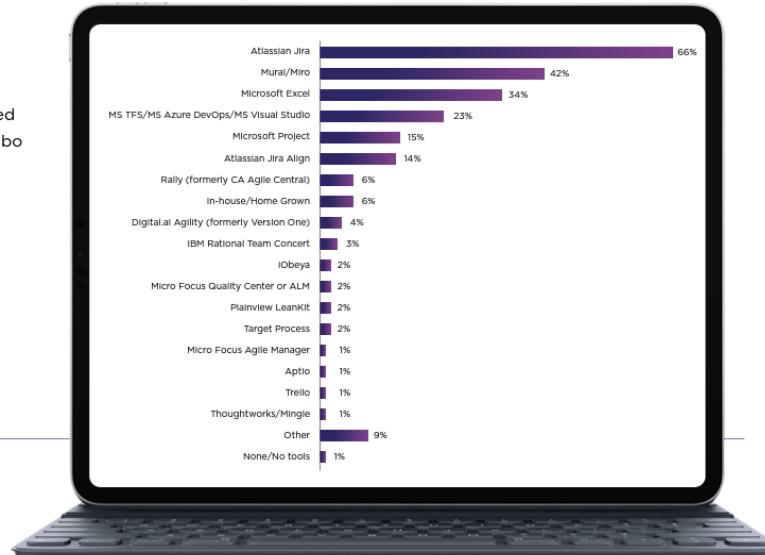
# Jira and alternatives

- Jira is the most popular Agile management tool

**2 out of 3** respondents are using **Atlassian Jira** to manage Agile projects.

That number dropped from 72% in year 15 but Jira Align usage grew, so Atlassian is holding fairly constant. Microsoft Excel dropped from 45% in year 15 to 34% this year, and the combined Microsoft TFS/Azure DevOps/Visual Studio combo dropped from 42% in year 15 to 23% this year.

Two-thirds of respondents use Atlassian Jira to manage Agile projects while over 2 in 5 use Mural/Miro and one-third use Microsoft Excel

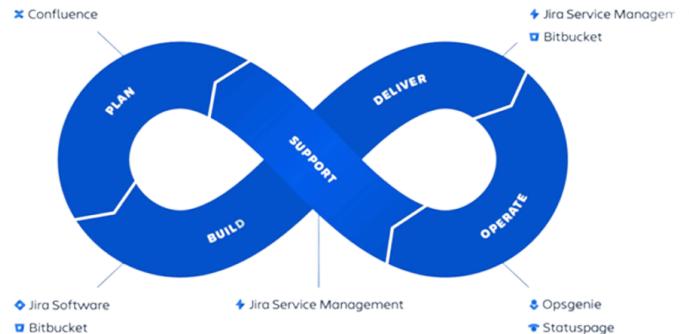


RE-SA-15th Annual State Of Agile Report

# Atlassian Products

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- **Jira Software:** Plan, Build, Track
- Confluence: Documentation, wiki
- All Products: <https://atlassian.com/software>
- Apps=plugins



# Jira: versions

## ➤ Jira Cloud

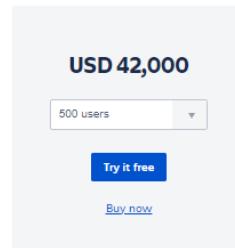
is hosted by Atlassian

- Its free version for teams up to 10
- Regularly updated
- Regional data storage coming up

Free	Standard	Premium	Enterprise
<p><b>\$0</b> always free for 10 users, <b>monthly subscription only</b></p> <p><a href="#">Get it now</a></p> <p>✓ Up to 10 users ✓ Unlimited project boards ✓ Backlog and basic roadmaps ✓ Reporting and insights ✓ 2 GB of storage ✓ Community support</p>	<p><b>\$7.75</b> per user (estimated) \$77.50 per month</p> <p><a href="#">Start trial</a></p> <p>Everything from Free plus: ✓ Up to 35,000 users ✓ User roles &amp; permissions ✓ Audit logs ✓ Data residency ✓ 250 GB of storage ✓ Business hour support</p>	<p><b>\$15.25</b> per user (estimated) \$152.50 per month</p> <p><a href="#">Start trial</a></p> <p>Everything from Standard plus: ✓ Advanced roadmaps ✓ Sandbox &amp; release tracks ✓ Project archiving ✓ Guaranteed uptime SLA ✓ Unlimited storage ✓ 24/7 Premium support</p>	<p><small>Billed annually. Switch the Billing cycle to Annual to view Enterprise pricing.</small></p> <p><a href="#">Contact sales</a></p> <p>Everything from Premium plus: ✓ Unlimited sites ✓ Centralized security controls ✓ Centralized user subscriptions ✓ 24/7 Enterprise support</p>

## ➤ Jira Data Center

is the self-managed solution

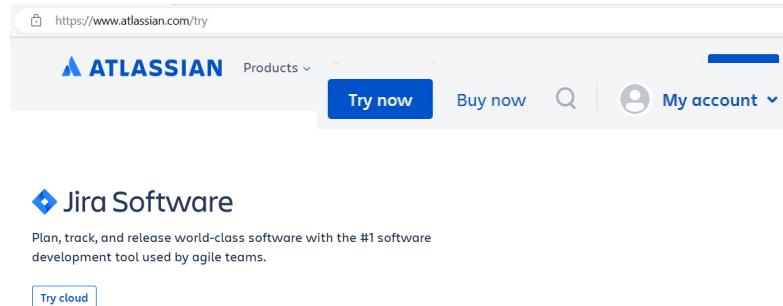


- Jira Server is discontinued  
(end of support feb 2024)

# Jira: free Cloud version

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- In this course we will use Jira Cloud
  - Free version, up to 10 persons
  - Hosted by Atlassian
- 
- Make an account at Atlassian.com and choose Jira Software>Try Cloud
  - Username.Atlassian.com is your site
  - Admin.Atlassian.com your backend
  - Your Jira at work might look slightly different, because of different version and of installed third party software



# Jira: 3 major concepts

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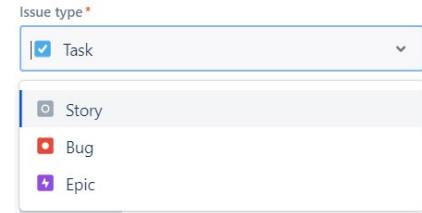
- **Issues:** Every task, bug, enhancement, request, story, epic; anything to do/be created and simply tracked is considered an issue.
  
- **Projects:**  
These are the collections of issues.
  
- **Workflow:** A workflow is the series of steps an issue goes all through starting from creation to completion.



## Issues

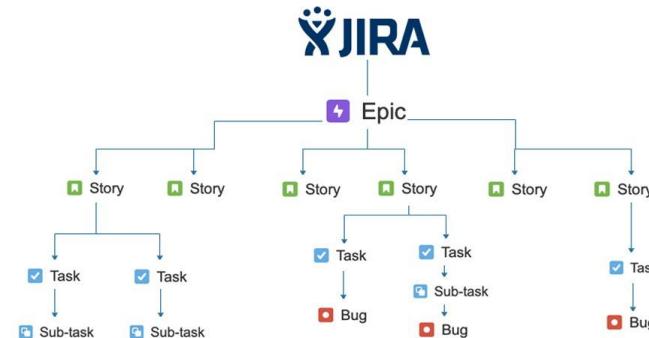
# Jira issues

- Every object you create in the Jira database is called an issue
- You set the **issue type** when you **create** an issue



## Default issue types

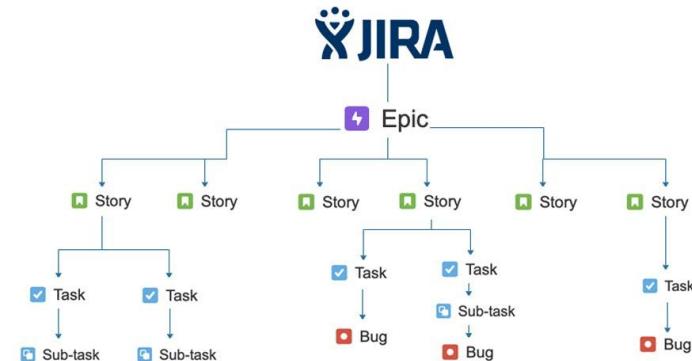
- Epic    Why?    Business need
- Story    What?    Customer needs
- Task    How?    Solution



# Jira issues: Epics

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- An epic is a large initiative (often several months) that encompasses smaller issues, within one or more stories
- Example: “as a user I can use the online application”
- The epic needs to have a unique Epic Name in Jira



# Jira issues: Stories and Tasks

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A story is a user requirement

- e.g. “As a user I can login to the online application”

## **Dev Tasks** examples

- Review the story
- Estimate the story
- Design
- Code
- Unit testing
- Integration

## **QA Tasks** examples

- Review the story
- Test cases
- Test scenarios
- Test data
- Reviews
- Set up test environments
- Execute test cases
- Report bugs

# Jira issues: Stories Points

- In most cases in Scrum the size of a story is estimated roughly by the developers using the Fibonacci sequence as a relative scale:

Backlog

Search backlog Q MS 8 Only My Issues Recently Updated

SSP-6 1

Details

Assignee Unassigned Assign to me

Reporter MS Mark Soekarjo

Labels None

Story Points 1

Priority Medium

As a user, I can find important items on the board by using the c SSP-14 = 3

As a scrum master, I can see the progress of a sprint via the Burr SSP-15 = 4

As a team, we can finish the sprint by clicking the cog icon next SSP-16 = 2

Instructions for deleting this sample board and project are MS SSP-17 =

SAMPLES

Sample Sprint 2 4 of 6 issues visible Clear all filters 05/Febr/23 4:39 PM • 19/Febr/23 4:59 PM View linked pages

Sample Sprint 3 0 of 3 issues visible Clear all filters Start sprint

Backlog 3 of 5 issues visible Clear all filters Create sprint



## Jira issues: Labels

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- Add labels to categorize your issues
- Any user on the system can add labels
- Labels are global
- <https://YOURDOMAIN.atlassian.net/rest/api/3/label>  
gives you all the labels in use on your domain in json format
- Caveat: Labels can not be deleted easily  
<https://confluence.atlassian.com/jirakb/how-to-delete-a-label-in-jira-297667646.html>
- Coming up: best practises ...

## Jira issues: Labels Best Practise

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- Only add a label if the connection you're trying to establish doesn't already exist. (For example, don't use a label to indicate that an issue belongs to a particular epic.)
- Always check to see whether a label already exists before creating it; remember, too, that it might simply be a question of spelling or case variation.
- Avoid using abbreviations unless they are widely understood and accepted by your team. This will, in turn, help avoid synonyms.
- Don't create too many labels, as the complexity of managing them increases with their number.



## Projects

## Jira : Projects

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- A project is a collection of issues
  - Each team usually has one project
  - Today you will make several projects to learn from
- 
- Exercise:  
Make 2 blank Software Dev projects : Team and Company managed

# Jira Projects: Team vs. Company managed

Name	Key	Type
Bug tracking	BT	Company-managed software
Sample Kanban Project	SKP	Company-managed software
Sample Scrum Project	SSP	Company-managed software
test1	TST	Team-managed software

**Simplified configuration**



Get up and running quickly, with simplified configuration.

Anyone on your team can set up and maintain
Settings do not impact other projects
Easy setup for issue types and custom fields
Simple configuration for multiple workflows
Access level permissions

**Expert configuration**



Benefit from complete control with expert configuration, customization and flexibility.

Set up and maintained by your Jira admins
Standardized configuration shared across projects
Complete control over issue types and custom fields
Customizable workflows, statuses and issue transitions
Detailed permission schemes

[Select a team-managed project](#) [Select a company-managed project](#)

- Caveats: no Advanced Roadmaps in team-managed Project at this moment
- Migrating between Team Managed and Company Managed is not simple
- <https://support.atlassian.com/jira-software-cloud/docs/migrate-between-team-managed-and-company-managed-projects>

# Jira : Create Team managed Project

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To create a new team-managed project:

- Choose Projects > Create project.
- Select Software development under Project template or Jira Software under Products.
- Learn more about the available templates and select a template.
- View the detailed information on the template and choose Use template.
- Choose project type: Team-managed.
- Give your project a name. You can change your template by selecting Change template.
- Choose who can access your project.
- Select Create.

# Jira : Create Company managed Project

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To create a new company-managed project:

- To create a new company-managed project:
- Choose Projects > Create project.
- Select Software development under Project template or Jira Software under Products.
- Learn more about the available templates and select a template.
- View the detailed information on the template and choose Use template.
- Choose project type: Company-managed.
- Give your project a name. You can change your template by selecting Change template.
- Choose who can access your project.
- Select Create.

# Jira: prefilling a project with issues

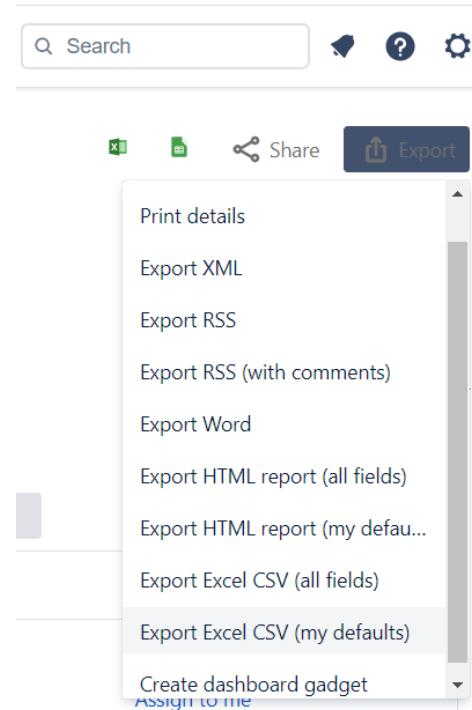
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- You might want to work with a prefilled project. See the next sheets for the two options:
  1. Export issues from existing project, then import
  2. Or generate fake content in Jira
  3. <http://jumble.explum.com/> is a 3<sup>rd</sup> party tool for fake data

# Jira: export issues

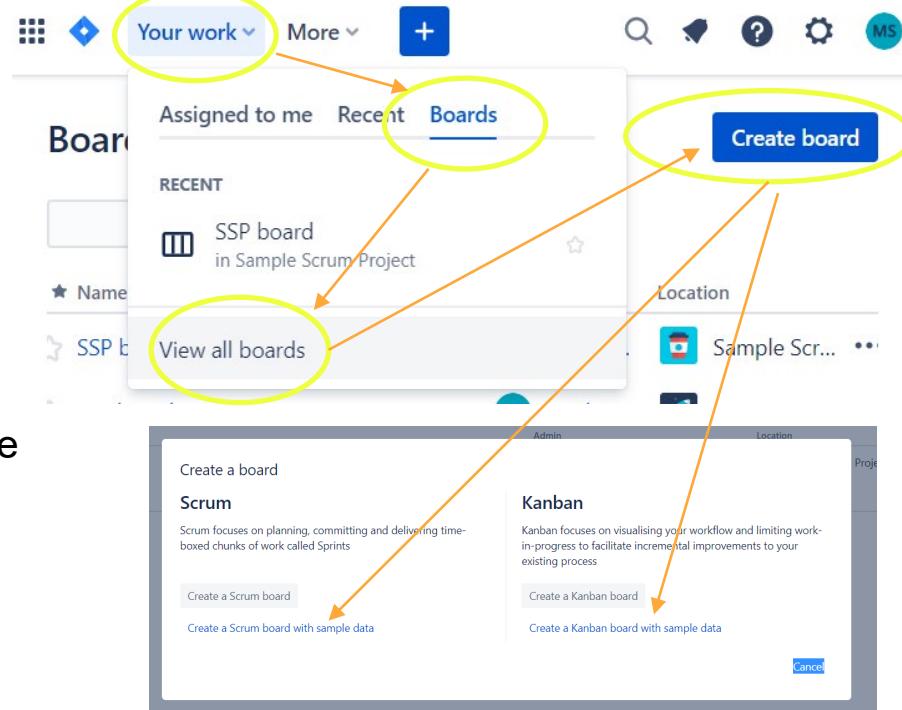
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- Filters>Advanced Issue Search
- In basic or JQL mode filters the items to export
- Hit: Search to run your filter
- Export (top right corner)
- For import into another Jira instance choose CVS



# Jira: create demo Projects with sample data

- To make a project with sample data go to
- Your work>Boards>View all boards
- Click on: Create board
- Create a Scrum board with sample data
- Repeat for Kanban board with sample data
- Compare the two projects. Play around with settings



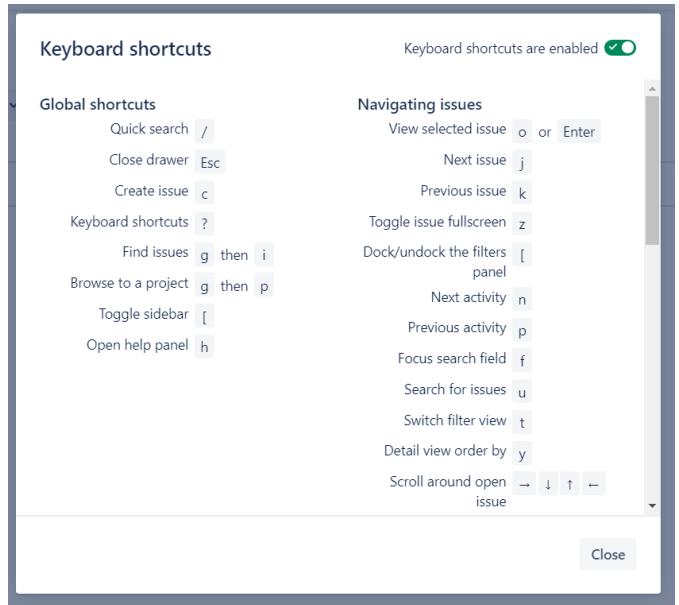


# Interface

The screenshot shows the Jira Software interface. At the top, there is a navigation bar with the following items: a grid icon, the Jira Software logo, "Your work", "Projects", "Filters", "Dashboards", "People", "Apps", and a "Create" button. Below this is a secondary navigation bar with the ATlassian logo, the word "Admin", a dropdown menu for "soekarjo", and links for "Overview", "Directory", "Products", "Security", "Billing" (which is underlined), and "Settings".

# Jira Interface: Shortcuts

- If you wish you can navigate Jira with keyboard shortcut
- Type ? To open the shortcuts dialog



- See also <https://confluence.atlassian.com/agile066/jira-agile-user-s-guide/using-keyboard-shortcuts>

# Jira Admin Interface: Directory

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- Log in to <https://admin.Atlassian.com> to perform administrator tasks.
- Go to the Directory to manage users

The screenshot shows the Atlassian Admin interface. At the top, there's a navigation bar with the Atlassian logo, the word "Admin", a user dropdown menu ("soekarjo"), and several tabs: "Overview", "Directory" (which is highlighted in blue), "Products", "Security", "Billing", and "Settings". On the left side, there's a sidebar with links for "Users", "Groups", and "Managed accounts". The main content area has a purple header box that says "Manage users in Directory" and "Give and manage product access to individuals or groups.". Below this, it shows "1/2" and a "Next" button. A small note at the bottom says "Manage product access for all the users in your organization. Learn more about access settings".

# Inviting people

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- Invite people in the Admin Directory to this site
- Add your colleagues
- Add me as an extra user: [soekarjo@gmail.com](mailto:soekarjo@gmail.com)
- Caveat: the free Jira Software Cloud allows for 10 users

# Jira Admin Interface: Directory

- Invite and manage users from the Directory tab

Admin / soekarjo

## Users

Manage product access for all the users in your organization. [Learn more about access settings](#)

Total users    Active users    Administrators

2    2    1

Enter name or email address  Filters (1)

User	Last active ⓘ	Status	Actions
 mark mark@soekarjo.nl	Aug 30, 2022 ⓘ	Invited	<a href="#">Resend invite</a> <span>...</span>
 Mark Soekarjo <small>ORG ADMIN</small> soekarjo@gmail.com	Feb 02, 2023	Active	<a href="#">Show details</a> <span>...</span>

< 1 >

# Jira Admin Interface: Products

- Add products and manage groups access from the Products tab

The screenshot shows the Atlassian Admin interface. The top navigation bar includes the ATASSIAN Admin logo, a user dropdown for 'soekarjo', and tabs for Overview, Directory, Products (which is highlighted in blue), Security, Billing, and Settings. On the left, there's a sidebar with links for Users, Groups, and Managed accounts. The main content area shows a 'Users' list with 'Admin / soekarjo'. A prominent purple callout box titled 'Manage products from the Products tab' contains the text 'Add products and manage group access to them.' and a 'Done' button. Below this, it says '2/2' and 'Manage product access for all the users in your organization. Learn more about access settings'.

# Jira Admin: Products

- From Jira Admin>Products
- Choose from the fly-out menu what you want to manage for a product
- Go through the option

Admin / soekarjo

**soekarjo**

Find by name  Products  Plans

Showing 3 results out of 3 products ↗

Product	Plan	Users	...
 Confluence <a href="https://soekarjo.atlassian.net/wiki">https://soekarjo.atlassian.net/wiki</a>	Free	2	...
 Jira Administration <a href="https://soekarjo.atlassian.net">https://soekarjo.atlassian.net</a>			...
 Jira Software <a href="https://soekarjo.atlassian.net">https://soekarjo.atlassian.net</a>	Free	2	...

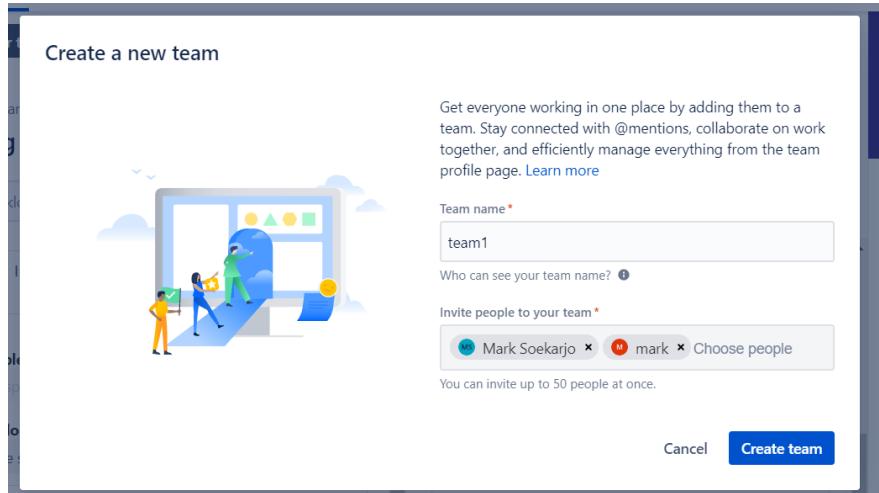
[◀ Previous](#) [Next ▶](#) 1-3 of 3 results

Manage users  
Manage product access  
  
Open Jira Software   
Jira settings   
Manage Jira apps 

# Create a team

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- Invite people by mail
- Add me as an extra user: soekarjo@gmail.com
- The free Jira Software Cloud allows for 10 users





## Backlog

# Jira Backlog: Versions

- Versions and Epics: side panels on the Backlog page
- Semantic versioning  
MAJOR.MINOR.PATCH
  - MAJOR: incompatible API changes
  - MINOR: add functionality backwards compatible
  - PATCH: backwards compatible bug fixes
- See <https://semver.org/>

Projects / Sample Scrum Project / SSP board

## Backlog

The screenshot shows the Jira Backlog interface for the 'Sample Scrum Project' under the 'SSP board'. At the top, there's a search bar labeled 'Search backlog' and filter buttons for 'Only My Issues' and 'Recently Updated'. On the left, there are two side panels: 'VERSIONS' (which lists 'Version 2.0' as active, 'Version 3.0', and 'Version 1.9.11') and 'EPICS' (which lists 'All issues'). The main area displays three sprints: 'Sample Sprint 2' (4 of 6 issues visible), 'Sample Sprint 3' (0 of 3 issues visible), and the 'Backlog' (3 of 5 issues visible). Each sprint has a 'Clear all filt' button. Below the sprints, there's a 'Create sprint' button and a 'To Do' list. A sidebar on the right shows user roles: 'As a developer, story status dur' (with a dropdown menu), 'Click the Active', 'top right of the', 'Active sprints w', 'Sprint's items ca', and 'Add a comment'.



## Reporting

# Jira Reporting Features

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Jira has a powerful set of reporting features

- Filter    Saved search result
- Filter subscription                              Search result by email
- Board    Status-based view of issues
- Dashboard                                      Statistic-based view of issues
- Gadget    Dynamic dashboard content  
    (graphs, charts, lists)



## Search/Filters

# Categorizing: Labels

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- Add Labels to your pages and attachments to categorize content
  - Every content owner can make labels.
  - Labels are global
  - Think before you make a new label
- 
- Which labels are missing?
  - Is there redundancy?

<https://DOMEINNAAM.atlassian.net/wiki/labels/listlabels-alphaview.action>

# Jira Search

- From the top right Search Box, or Issues>Search

The screenshot shows the Jira Issues page for the 'Sample Scrum Project'. At the top, there's a navigation bar with 'Filters', 'Dashboards', 'People', 'More', a '+' button, and a search bar labeled 'Search'. Below the navigation is the project name 'Projects / Sample Scrum Project'. The main area is titled 'Issues' and includes buttons for 'Share', 'Export issues', 'Go to advanced search', and 'LIST VIEW'. A search bar at the top of the list has 'Search issues' and a magnifying glass icon. Below it, a dropdown menu says 'Project: Sample Scrum Project' followed by 'Type', 'Status', and 'Assignee'. There are also 'More +' and 'Save filter' buttons.

- Start setting up your query in Basic mode, refine in advanced mode/JQL

This screenshot shows the Jira search interface. It features a 'Search issues' input field with a magnifying glass icon. Below it is a dropdown for 'Project: Sample Scrum Project'. To the right are filters for 'Type', 'Status', and 'Assignee'. At the bottom right are two tabs: 'BASIC' and 'JQL', with 'BASIC' highlighted. At the very bottom left are 'More +' and 'Save filter' buttons.

<https://confluence.atlassian.com/jirasoftwareserver/advanced-searching-939938733.html>

# Jira Save Filter

- A **Filter** in Jira is a saved Query

The screenshot shows the Jira search interface. At the top, there is a navigation bar with links for Filters, Dashboards, People, Apps, and a prominent blue Create button. To the right of the Create button is a search bar with a magnifying glass icon and a placeholder "Search". Below the navigation bar, the word "Search" is displayed in large blue letters, followed by a "Save as" button with a small downward arrow icon. A red arrow points from the text "A Filter in Jira is a saved Query" to this "Save as" button. Further down, the search query "project = demo AND assignee = currentUser()" is shown in a search bar, preceded by a green checkmark icon. To the right of the query are a help icon, a blue Search button, and a "Switch to basic" link. On the far right of the interface, there are icons for export (CSV, Excel, PDF), share, and help.

# Jira Share Filter

- Click details > Edit Permissions
- Click My Organization
- Click Add to confirm

Assigned to me in (SKD,SSP) Save as [Details](#)

Owned by Mark Soekarjo

Permissions  
This filter is only visible to you.  
This filter is only editable by you.

[Edit permissions](#)

1-27 of 27 ↗

T	Key	Summary
SKP-3	Add work items with "+ Create Issue" at the	

Edit filter

Name \* Assigned to me in (SKD,SSP)

Description use this filter to view your assigned issues in the projects SKD and SSP

Viewers

Private Only you [Add](#)

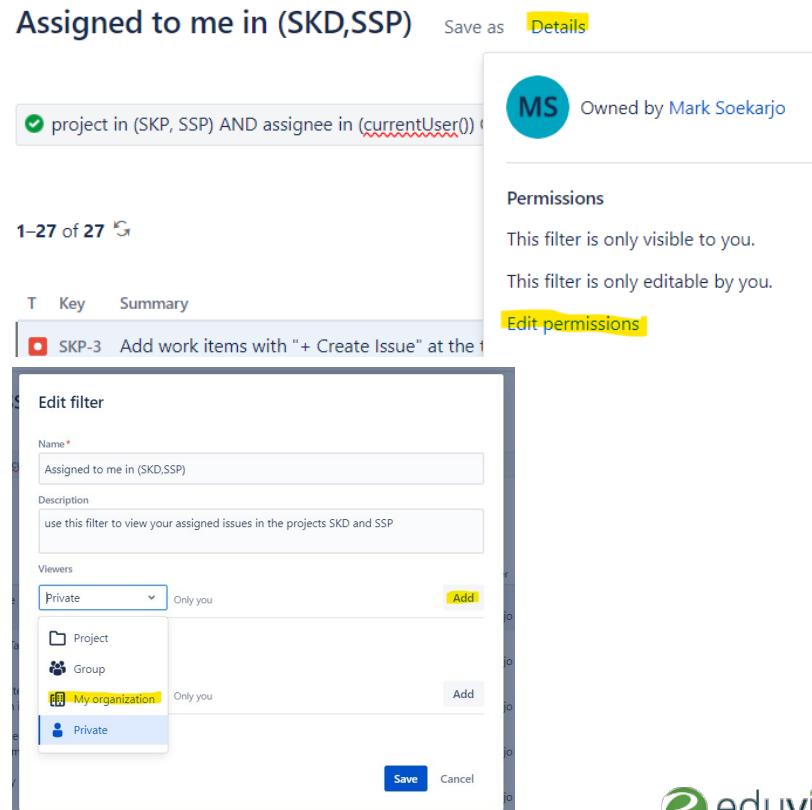
Project [Add](#)

Group [Add](#)

My organization Only you [Add](#)

Private [Add](#)

[Save](#) [Cancel](#)



# JQL, Jira Query Language

JQL is the language to search Jira. It is very powerful in extracting data from Jira that is not visible in the standard screens

- Resembles SQL
- A **Filter** in Jira is a saved Query

## Timeline

2002	Jira 1.0 released by Atlassian
2004	Jira 3.0 introduced customizable workflows
2009	Jira 4.0 introduced Jira Query Language (JQL)
2012	Jira 5.0 launched with enhanced social features
2013	Jira 6.0 redesigned with mobile-friendly interface
2014	Jira Service Desk 2.0 released with SLA support



## JQL Cheat Sheet

A simple query in JQL (also known as a "clause") consists of a **field**, followed by an **operator**, followed by one or more **values** or **functions**. For example:

project = Test  
field operator value

To perform a more complex query, you can link clauses together with **keywords**.

project = TEST AND assignee in (currentuser())  
field operator value keyword field operator function

## Fields

Assignee	Epic link	Resolved
Affected version	Filter	Sprint
Attachments	Fix version	Status
Comment	Issue key	Summary





## Boards

# Jira Boards

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- A board is a **status-based view** of issues.  
It shows the progress of team work with issues as cards you can move across the columns of the board

## Default columns

- “To do”, the first column on the board
- “In progress”
- “Done”, the last column on the board

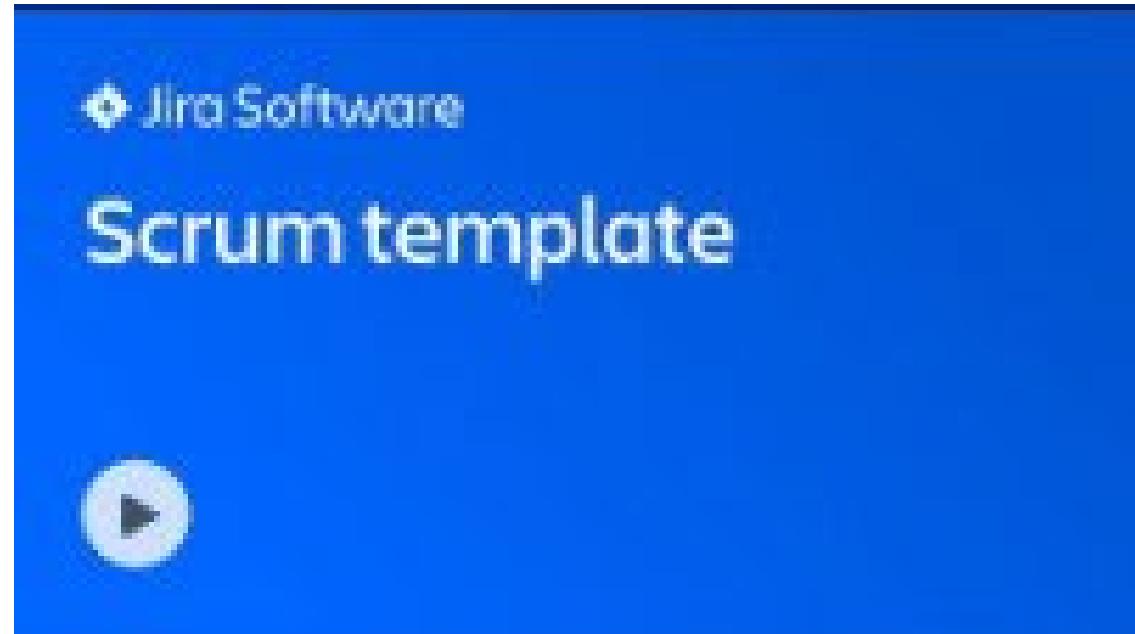
## Available Templates

- |  |   |                         |
|--|---|-------------------------|
| ➤ Scrum Board  | sprint based improvements                       | timeboxed improvements  |
| ➤ Kanban Board   | maximize flow, minimize # of issues in progress | continuous improvements |
| ➤ Jira users and projects can have multiple boards of both types |   |                         |

# Jira Boards: Scrum

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- Scrum can be helpful to teams that approach their work as continuous improvements made through fixed-length iterations called sprints.
- Strict deadlines/timeboxed
- Pull in work from the backlog



# Jira Boards: Kanban

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Kanban can be helpful to teams that want to:

- visualize their work
- limit work-in-progress
- maximize efficiency (or flow).
- continuously deliver

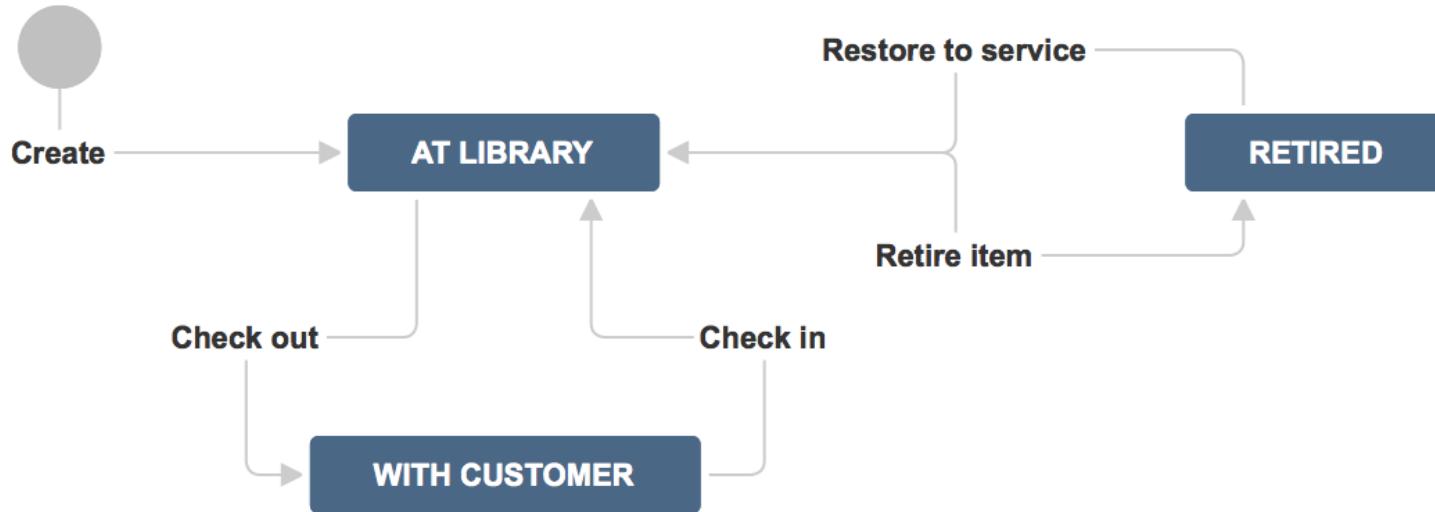




# Workflow

# Jira workflow: Library Example

- Each item (e.g. book) is an issue in Jira
- Each issue can have Statuses, Transitions, Assignees, Resolutions



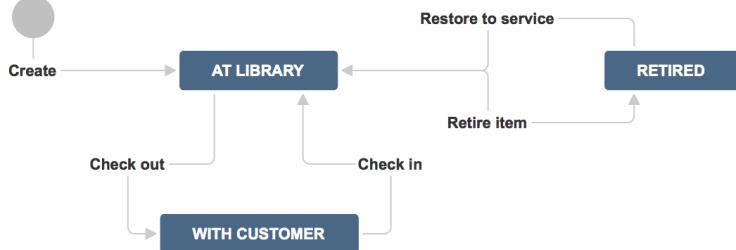
# Jira workflow: Anatomy

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- Statuses              What?
- Transitions            Where?
- Assignees             Who?
- Resolutions           Why?

# Jira workflow: Statuses

Statuses: Where?



- **Unresolved = Open**
- At Library
- With customer
  
- Open Statuses:  
Open, In Progress, In Review,  
Scheduled, Waiting on Customer,  
and Pending Analysis
  
- **Resolved = Closed**
- Retired
  
- Closed Statuses:  
Shipped, Published, Fixed,  
Analysis Complete, and Closed

# Jira workflow: Statuses

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- In the default workflow the progression is:  
Open, In Progress, Resolved, Closed
- Add your own

OPEN

The issue is open and ready for the assignee to start work on it.

IN PROGRESS

This issue is being actively worked on at the moment by the assignee.

REOPENED

This issue was once resolved, but the resolution was deemed incorrect. From here issues are either marked assigned or resolved.

RESOLVED

A resolution has been taken, and it is awaiting verification by reporter. From here issues are either reopened, or are closed.

CLOSED

The issue is considered finished, the resolution is correct. Issues which are closed can be reopened.

BUILDING

Source code has been committed, and JIRA is waiting for the code to be built before moving to the next status.

BUILD BROKEN

The source code committed for this issue has possibly broken the build.

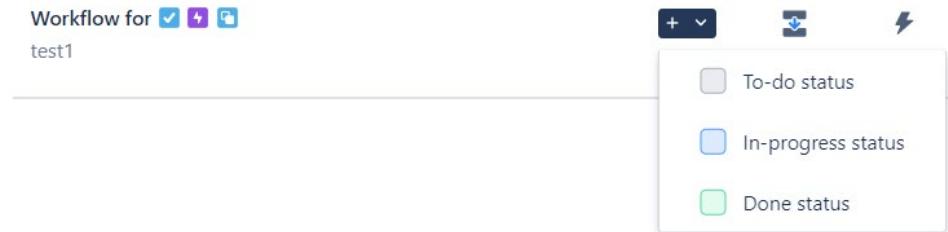
TO DO

IN PROGRESS

DONE

TO DO

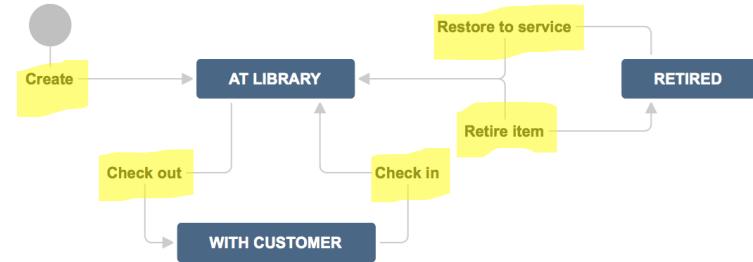
# Jira workflow: Anatomy



# Jira workflow: Transitions

## Transitions: What?

- A transition moves an issue from status to status
- Between all statuses, or along a strict pathway (e.g. library)
- Uni-directional or bi-directional
- Workflow permissions
  - Librarian checks out
  - Customer checks in
  - Staff restores to service

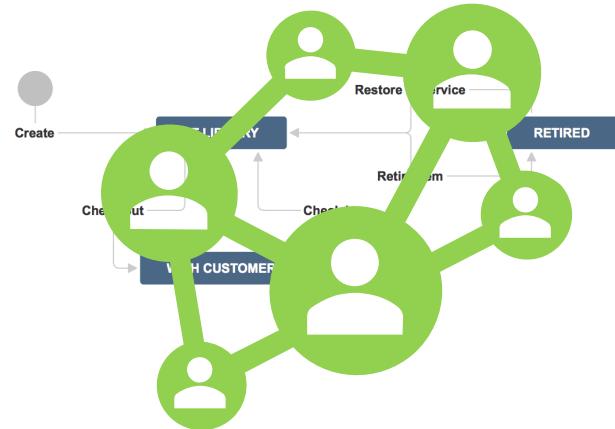


# Jira workflow: Assignees

---

## Assignees: Who?

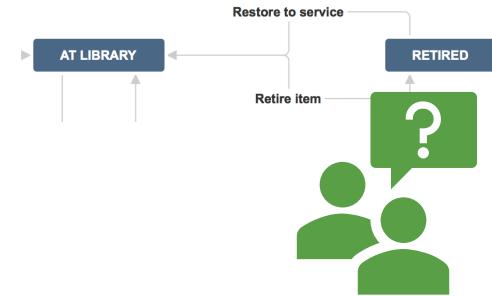
- The assignee is responsible for an issue at a given status
  
- In the library example:
  - Book on loan: Assignee is set to Customer
  - Book on shelf: Assignee is set to Unassigned



# Jira workflow: Resolutions

## Resolutions: Why?

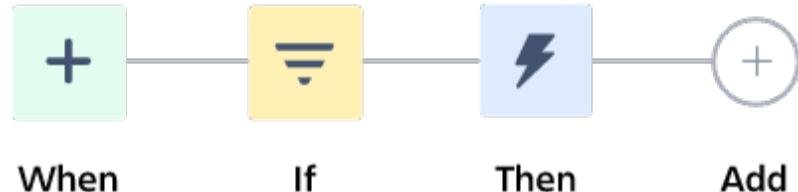
- A Resolution is the reason why an issue moves from an open to closed status
- Remove when opened again
  
- e.g. Book Removed from collection:
  - Damaged
  - Out of Date
  - Lost



# Jira workflow: Automation

---

- <http://Atlassian.com/automation>
- Jira automation template library
- Templates and sandbox



- Automation Rule example
  - Trigger When Event Jira/external Creation of issue
  - Condition If Refines the rule Is it high priority?
  - Action Then Execution of rule Set field/ MS Teams message

# Jira workflow: Automation Exercise

---

- <http://Atlassian.com/automation>
- Evaluate the different templates to determine which would be a useful starting point for your project
- Add automation to your Jira project using templates from at least two different categories

Popular categories



Most popular automations  
[See templates →](#)



Jira + Slack / MS Teams  
[See templates →](#)



Jira + Bitbucket, GitHub or GitLab  
[See templates →](#)



Jira automation for software teams  
[See templates →](#)



Jira automation for business  
[See templates →](#)



Jira Service Management automations  
[See templates →](#)



**Dag 2**

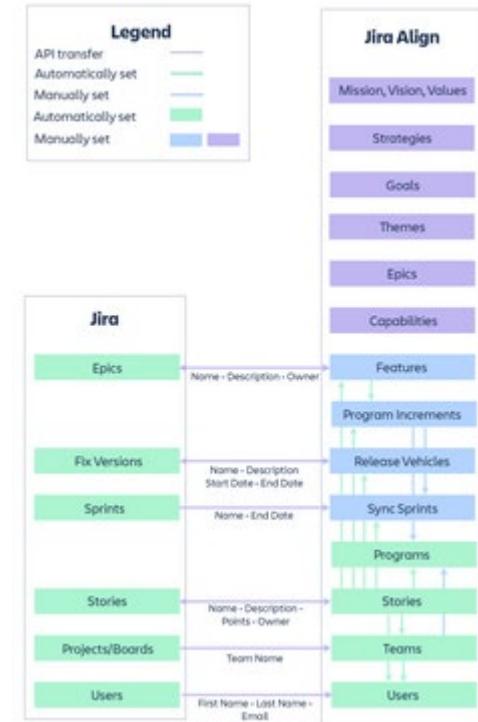
## Dag 2: Agenda

---

- Jira Align
- Integration with  
Confluence
- Slack
- Git
- Dashboards
- Reporting

# Jira Align

- Jira Align is Atlassian's Enterprise Agile at Scale solution
- Coordinates teams working with Jira, aligning them to the corporate strategy
- Jira Align starts with a five-level hierarchy:  
Strategy -> Theme -> Epic -> Feature -> Story
- Pricing different, no free version
- Many (consultancy) services around scaling up
- Typically for enterprises with 500+ devs
- Specific implementations for SAFe, Scrum@Scale, Disciplined Agile(DA), or LeSS
- <https://www.eduvision.nl/course/jira-align> 2 days course



# Jira Best practises for Jira Align

To make scaling up possible have all teams do the following in Jira Software

- Use “Epics” in Jira as you would “Features”
  - > if an issue may span a PI it should be an Epic
- Ensure stories in Jira are tied to a parent Jira Epic
  - > orphan stories do not add value to higher initiatives
- Ensure stories in Jira have a story point estimate
  - > estimation is needed over the whole portfolio
- Finish a story within a sprint, or move it before closing the sprint, or it will remain tagged with that sprint





## Integration

# Jira Integration

---

- A lot of programs have their own integration with Jira e.g.
  - Confluence
  - Slack
  - Git en Bitbucket
  - CI/CD pipelines
- For these and for other programs there are custom apps in Atlassian Marketplace, so be sure to check the Marketplace for extra functionality

# Atlassian Marketplace: apps/plugins

- Jira has become a swiss army knife and is used for almost everything.
- Find your apps at

<https://marketplace.atlassian.com/>

## ➤ Exercise

Filter for jira and “free for up to 10 users” and try out a plug-in that you think might fit your projects.

The screenshot shows the Atlassian Marketplace interface. At the top, there's a blue header bar with the text "Atlassian Marketplace". Below it, a search bar displays the query "jira" and a filter "Free up to 10 users". To the right of the search bar, there's a section titled "Top-rated apps" showing two results:

- Jira Workflow Toolbox**: An app by Decadis AG, rated 4.5 stars (419 reviews), with 6.2k installs. It's categorized under "CLOUD FORTIFIED".
- Better PDF Exporter for Jira**: An app by Midori Global, also rated 4.5 stars (419 reviews), with 6.2k installs. It's categorized under "CLOUD FORTIFIED".

On the left side of the main content area, there are several filter options and category lists:

- Filters: "All Products", "Select a hosting type", "Top rated", and a checked "Free up to 10 users".
- Categories: Utilities, Project management, Integrations, Reports, and Macros.

# Jira and Confluence

---

## Connect a Confluence space to a Jira project

This is the first step to integrating Confluence and Jira.

- Navigate to 'Project pages' in the Jira lefthand sidebar
- Click 'Connect to Confluence'
- Search for the Confluence space you want to connect

## Add a Jira shortcut to a Confluence page

Adding shortcuts will make it easy to switch between products when needed.

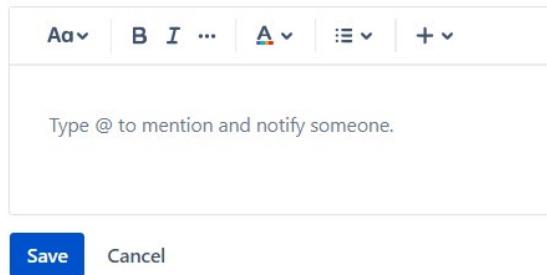
- Copy the URL of your Jira project
- Navigate to the Confluence space you'd like to connect it to
- Tap the Add shortcut option in the Confluence lefthand sidebar
- Paste your Jira project URL in the Edit space shortcuts dialog box, and name your shortcut for easy reference

## Exercise

- Make a Confluence page that shows the Jira issues assigned to you that are in progress

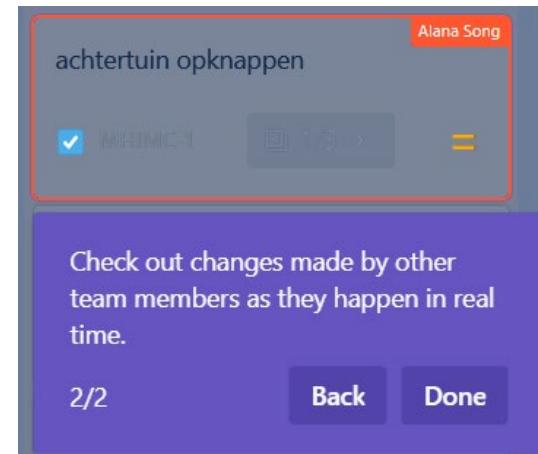
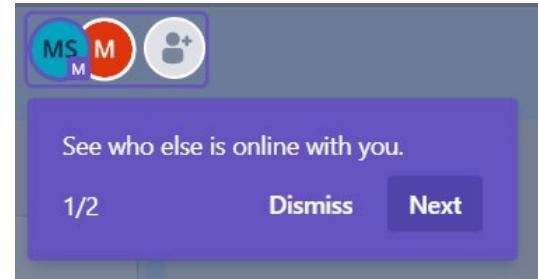
# Jira Collaboration

- Check online status of team members
- Check changes in real time
- To mention a person using autocomplete, type '@' in the editor, then start typing their name. If the person does not appear add her to the team



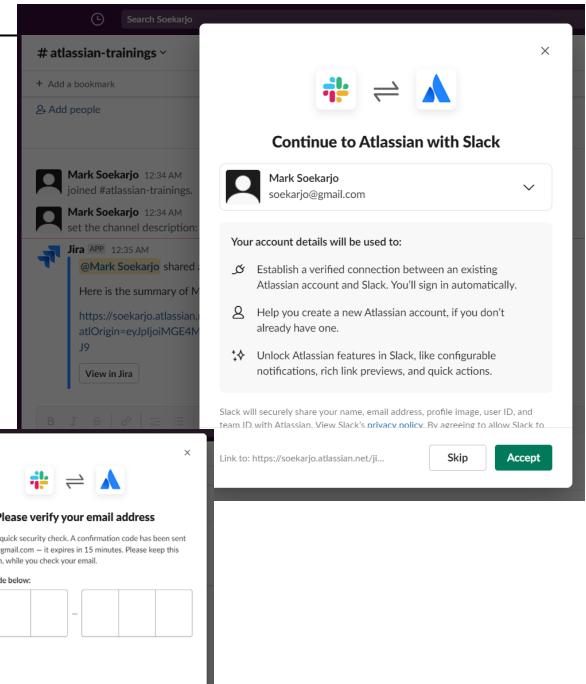
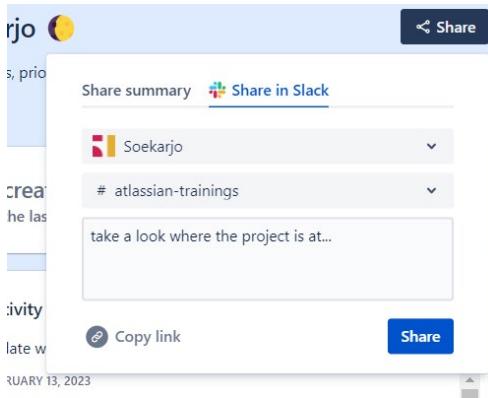
## Exercise

- Open a conversation in your work project by mentioning a colleague



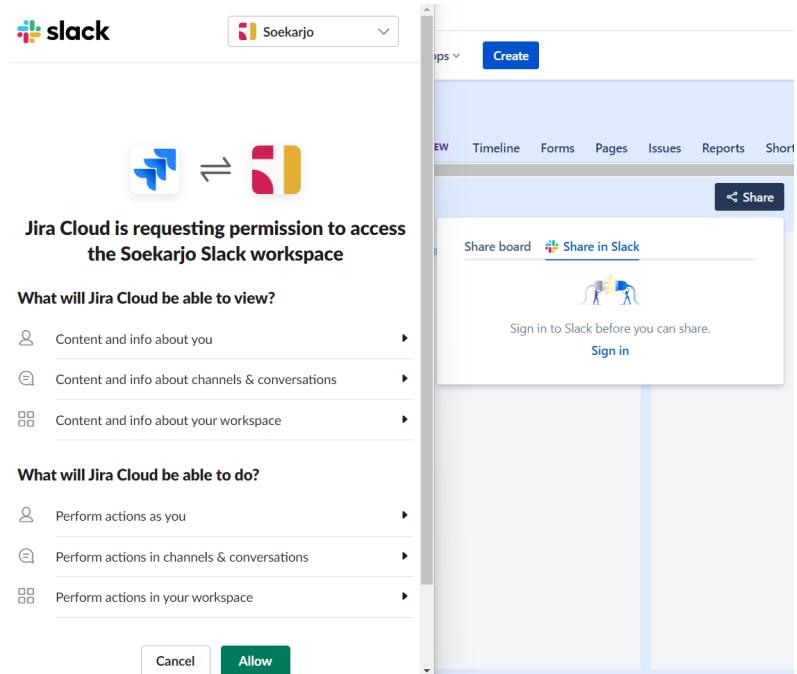
# Integration with external software: Slack

- Setting up communication with Slack, (or MS Teams) is done by your site administrator.
- In this course you will set up communication to a personal Slack account
- Connect to Slack by trying to share e.g. a board or summary to Slack.
- It will prompt for your Slack space credentials
- You can now send messages through Slack.
- Use the share icon to share any info in Jira



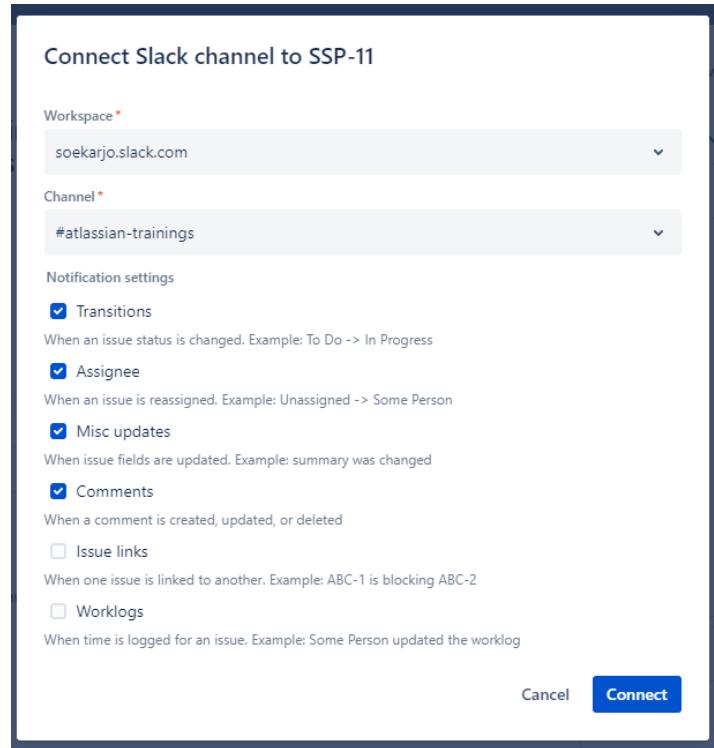
# Following Jira links in Slack

- If you click for the first time on a Jira link in Slack it will prompt you to connect your accounts in that direction as well.



# Subscribing to Jira Issues in Slack

- In a jira issue go to the ... menu (top right)
- Click connect Slack channel
- Choose the target Slack Workspace/channel and the conditions for your notification



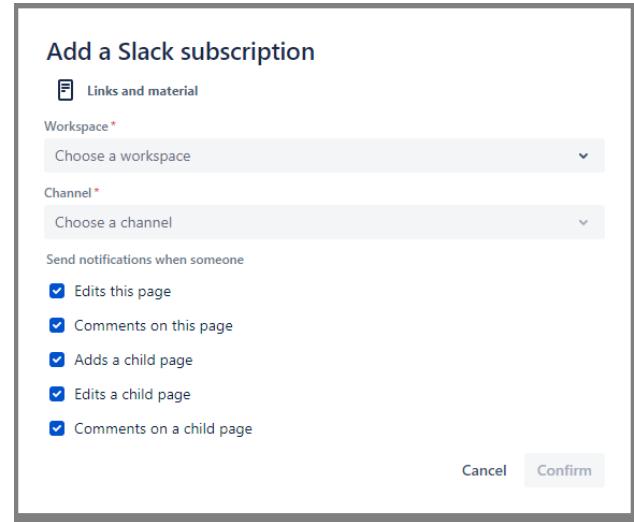
# Subscribing to Confluence pages in Slack

---

- In a confluence page go to the ... menu (top right)
- Click Slack notification
- Choose the target Slack Workspace/channel and the conditions for your notification

## Exercise

- Subscribe to at least two relevant pages at your work



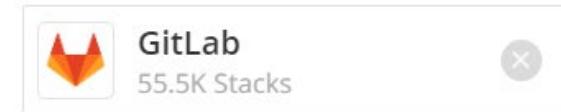
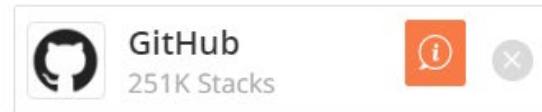
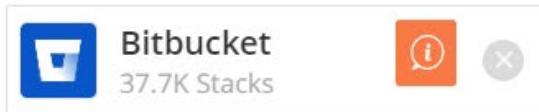
# Jira and Git

- Bitbucket Cloud is Atlassian's native Git tool with built-in CD/CI
- Free version limited to 5 users
- Access Git from a jira project via the "Code" link on the left
- Alternatively choose GitHub or GitLab
- Bitbucket: best integration
- GitHub: most popular for public visibility
- GitLab: only open source solution

The screenshot shows the Jira Software interface. At the top, there are navigation links: Your work, Projects, Filters, Dashboards, More, and a search bar. Below the header, a sidebar on the left lists 'Sample Scrum Project' under 'Software project' and sections for 'PLANNING' (SSP board, Board, Roadmap, Backlog, Active sprints, Reports), 'Issues', and 'Components'. On the right, the main area is titled 'Projects / Sample Scrum Project' and 'Code'. It displays a tooltip for the 'Code' button, which says: 'Get visibility into your team's work, from issue to code. Create an automated DevOps workflow and minimize context switching between Jira Software and Bitbucket, GitHub, GitLab, and other source code management tools.' Below this, there's a section titled 'Select a source code management tool' with icons for Bitbucket, GitHub, GitLab, and others, and a 'Quickstart' button.

## Excercise

- After the next two slides try and set up at least one repo



<https://stackshare.io/stackups/bitbucket-vs-github-vs-gitlab>

# Jira issues in GitHub

- Install GitHub for jira from the Marketplace  
(or choose another app)
- Get started
- Connect GitHub Organization
- Authorize
- Install GitHub for jira on your github account

- Copy Issue Key in Jira issue (Top Left) and use for commits

JC-7: add repository for Goodies

Add epic / JC-7

Which GitHub product do you want to connect?



Choose this if the URL of your GitHub organization contains the domain name "github.com". This encompasses "Free", "Team" and "GitHub Cloud Enterprise" accounts.



Choose this if the URL of your GitHub organization does not contain the domain name "github.com"; it instead points to a GitHub Enterprise Server installed into your own infrastructure.

Continue

Jira by Atlassian would like permission to:

Verify your GitHub identity (soekarjo)  
Know which resources you can access  
Act on your behalf

Learn more about Jira

Cancel Authorize Jira

Authenticating will redirect to  
<https://github.atlassian.com>

Install Jira

Install on your personal account soekarjo

All repositories  
This applies to all current and future repositories owned by the resource owner.  
 Only select repositories  
Select at least one repository  
Also includes public repositories (read-only).

Select repositories

Search for a repository  
wit  soekarj/jira  
no description  
✓ security events  
✓ Read & write access to code, issues, and pull requests

Install Cancel

Note: you'll be directed to the GitHub App's site to complete setup.

# Jira issues in Bitbucket

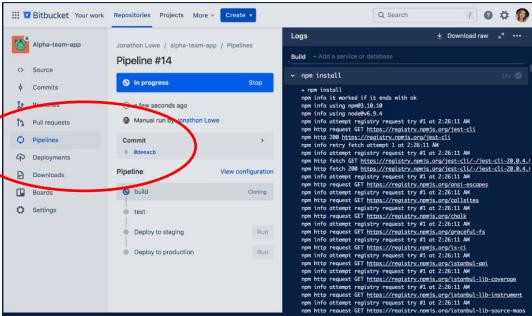
- First add Git repositories to a project (as admin)
- Add issue keys in branch names, commit messages, and pull requests to link your development work
- View info in your issue's Development section

The screenshot shows the Bitbucket interface for creating a new repository. A red circle highlights the 'LINK COMMITS TO JIRA ISSUES' section. It contains two options: 'Copy issue key' (with value 'SSP-11') and 'Copy sample Git commit' (with value 'git commit -m "SSP-11 <message>"').

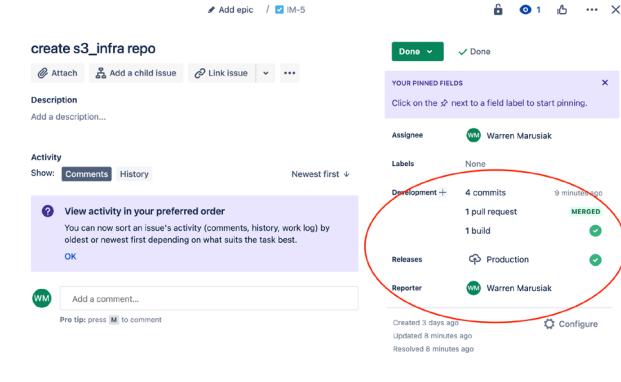
The screenshot shows the Bitbucket issue details page for a pull request. At the top, there is a search bar with the placeholder 'Your Jira issue key' and a field containing 'ABC-123 -your-development-branch'. Below the search bar, there are buttons for 'Add epic' and 'IM-5'. On the right, there are pinned fields for 'Assignee' (Warren Marusiak), 'Labels' (None), 'Development' (4 commits, 1 pull request, 1 build, MERGED), 'Releases' (Production), and 'Reporter' (Warren Marusiak). A red arrow points from the 'Development' section of the Bitbucket interface on the left to the 'Development' section of the Bitbucket issue details page on the right.

# CI/CD pipelines in Bitbucket

- CI/CD Pipelines are integrated in Bitbucket



- Information will show up in the jira issue, provided the issue key is used in Bitbucket





## Dashboard and Reports

# Jira Dashboard

---

- A dashboard is a **statistic-based view** of issues for one or more projects.  
It shows counts, trends and charts
  
- There is a default dashboard and you can create your own
- You use a Query to pose question to Jira
- JQL, or Jira Query Language, is the language you use to write Queries.
  
- The main difference with a **report** is that the gadgets on a Dashboard are dynamic, while a report shows the data at the time the report is run

# Jira Dashboard

- Go to Dashboard in the top menu
- Drag and configure components from the right column
- I will show 2 examples

The screenshot shows the Jira Software interface with the 'Dashboards' tab selected in the top navigation bar. The main area is titled 'my Dashboard' and contains a 'Assigned to Me' gadget. This gadget displays 10 results and includes columns for Issue Type, Key, Summary, and Priority. A message at the top indicates that changes will be saved automatically. To the right, there is a sidebar titled 'Add a Gadget' with a search bar and a list of available gadgets, each with an 'Add' button:

- Activity Stream (By Atlassian)
- Average Age Chart (By Atlassian)
- Average Number of Times in Status (By Atlassian)
- Average Time in Status (By Atlassian)
- Assigned to Me (By Atlassian)
- Assigned to Me (Jira)
- Charts (Jira)
- Wallboard (Jira)
- Wallboard (Wallboard)

At the bottom of the sidebar, there is a note: "Drag a gadget to this column or [add a new gadget](#)".

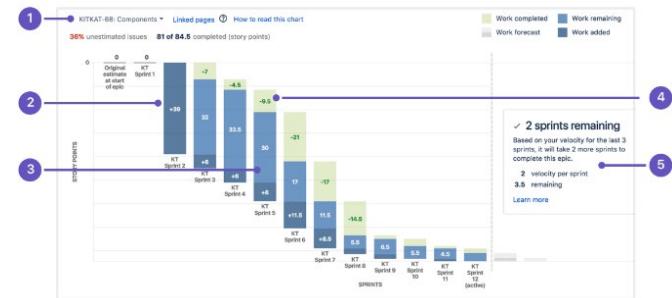
## Exercise

- Make two dashboards  
First in your sandbox,  
then in your work project  
to show meaningful results

# Burn Rate Chart

A burndown chart shows the amount of work completed in an epic or sprint, and the total work remaining

- predict likelihood of completing the work in remaining time, help with scope creep awareness
- Insight in over/under commitment
- Sharp drop->inaccurate work estimation or break down

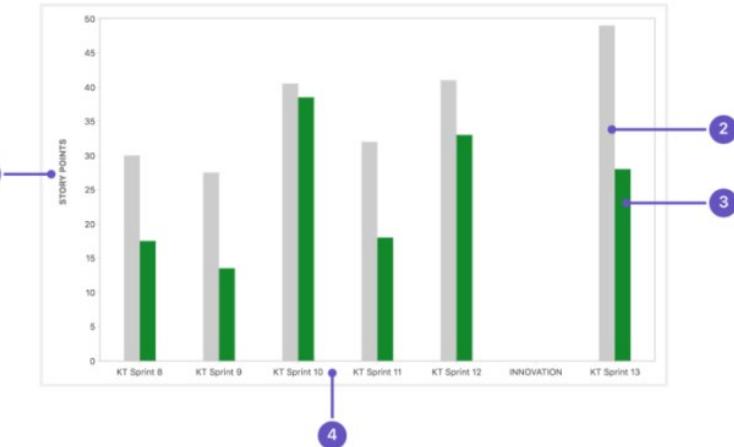


# Velocity Chart

---

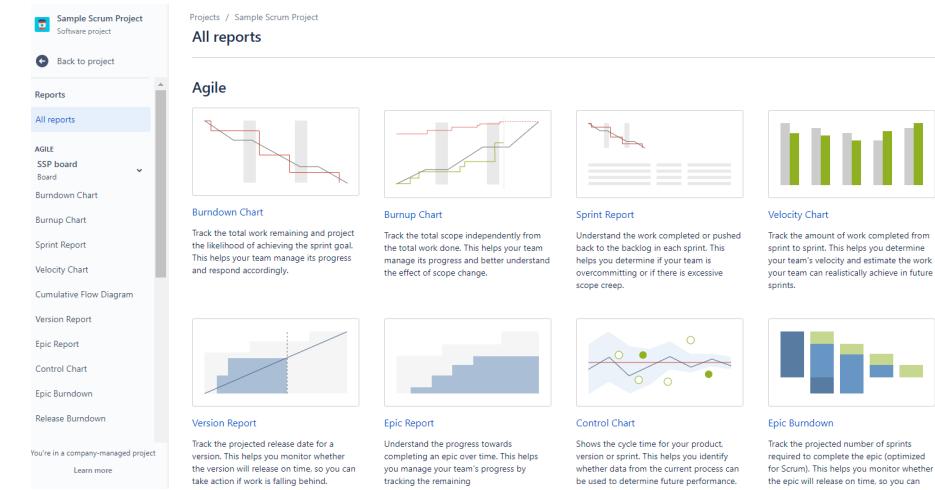
A Velocity Chart shows work completed in an epic or sprint (3) vs. the amount committed to (2) for the last 7 sprints.

- Velocity is the average of completed work and is a forecast for the next sprint
- only in company managed Scrum projects
- Select Reports>Velocity



# Reports

- In a project click on “Reports” in the left menu
- The reports are comparable to what we saw in Dashboards, only static and for a specific project



## Exercise

- Make a rapport for a project from work

# Jira: best practices

---

- Gebruik synergie met andere Atlassian tools zoals Confluence, etc.
- Implementeer een workflow in Jira admin om de flow van stories af te dwingen over teams.
- Gebruik subtaken om concreet werk van een taak meer inzichtelijk te maken.
- Gebruik subtask-templates om standaard subtaken te maken bij het maken van een nieuwe story.
- Investeer tijd om JQL goed te leren ... erg handig om data uit het systeem te halen wat je niet uit de standaard schermen krijgt.
- Gebruik alleen van Jira wat je nodig hebt en “zet de rest uit” (veldweergave e.d.).
- Jira is ook handig om “werkborden” te maken voor individuen en subteams, d.m.v. JQL en het filter van het bord.
- Gebruik @colleganaam en juiste emailinstellingen om elkaar te taggen en te attenderen in Jira en Confluence.
- Main take away: invest in knowledge of JQL

Shout Out to Nick Badoux, scrum master@Stater

# Importing data from Excel

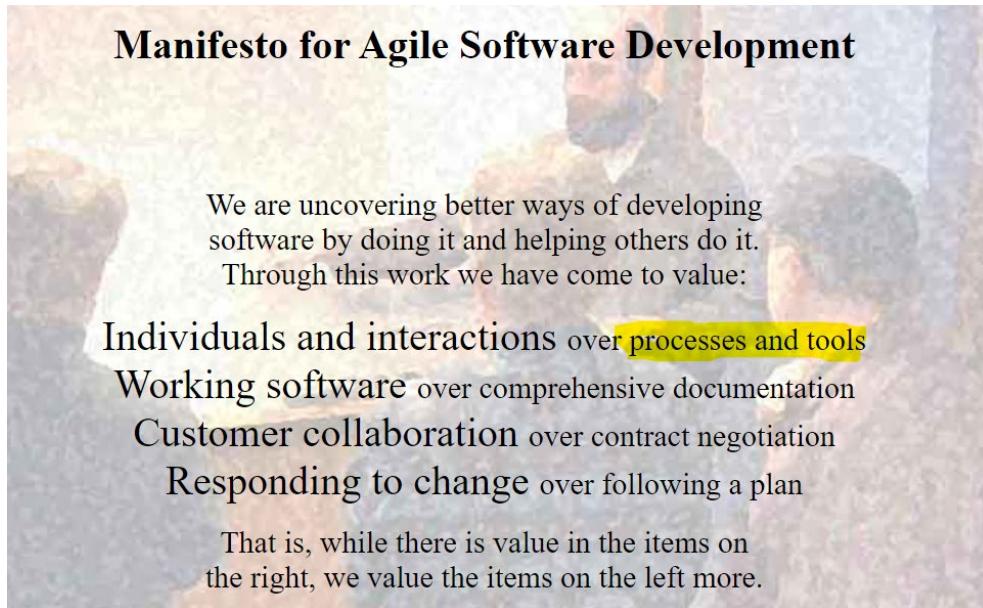
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- You can also import your data as CVS or json
- Your data must follow the format Jira needs
- Follow this tutorial: <https://confluence.atlassian.com/adminjiraserver/importing-data-from-csv-938847533.html>
- Or, set up a new project with a relevant issues and export that as an example

# The Jira Conundrum

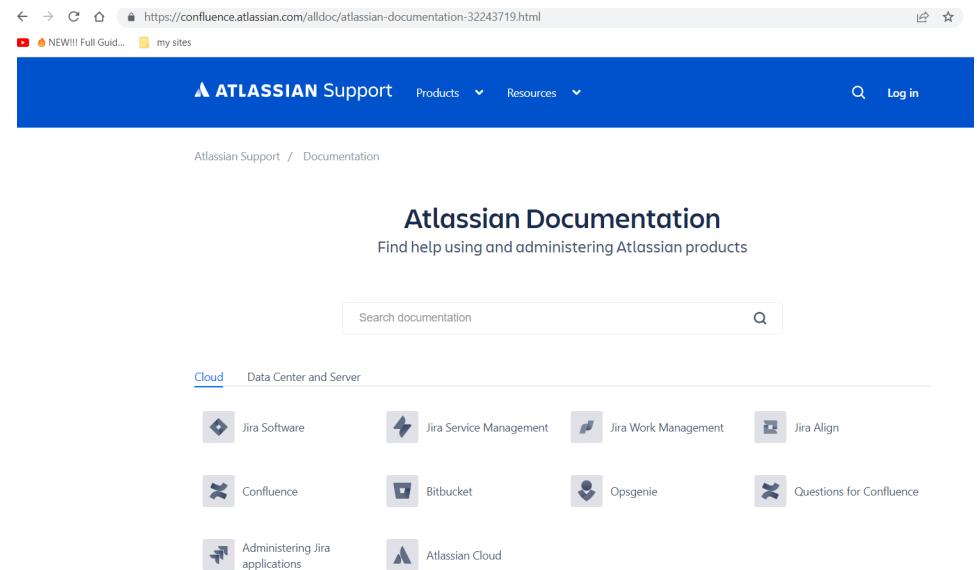
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- Jira is a tool. As such it can help, but also risks to shift the focus from human interactions to processes



# Next steps

## ➤ Atlassian documentation



The screenshot shows the Atlassian Documentation homepage. The URL in the browser bar is <https://confluence.atlassian.com/alldoc/atlassian-documentation-32243719.html>. The page features a blue header with the Atlassian Support logo, navigation links for Products and Resources, and a search bar. Below the header, the title "Atlassian Documentation" is displayed, followed by the subtitle "Find help using and administering Atlassian products". A search bar is located below the title. The main content area is divided into sections for "Cloud" and "Data Center and Server". Under "Cloud", there are links for Jira Software, Jira Service Management, Jira Work Management, Jira Align, Bitbucket, Opsgenie, and Questions for Confluence. Under "Data Center and Server", there are links for Confluence, Administering Jira applications, and Atlassian Cloud.

<https://confluence.atlassian.com/alldoc/atlassian-documentation-32243719.html>

# Next steps

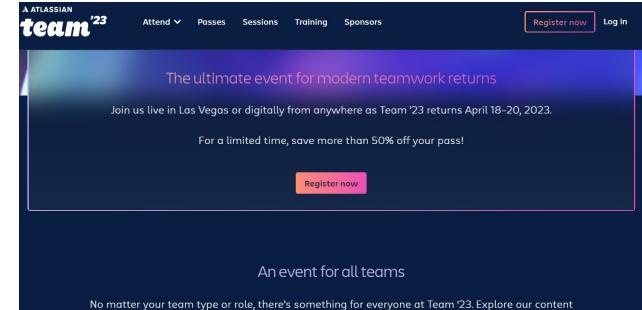
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- <http://atlassian.com/events>

## Trainingen bij Eduvision

- Confluence
- Jira advanced workflows & automation (1 day)
- Jira Align (2 days)
- Jira Service Management (1 day)

<https://www.eduvision.nl/course/jira-advanced-workflows-automation>







## Extra slides



**testing**

# Jira & Test Case Management

---

- Jira has no specific issue types for testing
- Customization is possible, but has limitations
  - e.g. endpoint is always “done”, which is fine for most issues, but may not be for test cases

## **Need to know as a tester from development**

---

- Do you have access to the bug tracking project in Jira?
- Familiarize yourself with any reporting requirements from development
- Ask if they need specific logs, reports or other items attached to replicate your reported issues

# Test Case Example

- Writing test cases using custom issue types
- Add tests as subtasks to story

The screenshot shows the Jira software interface. At the top, there's a navigation bar with 'Your work', 'Projects' (which is the active tab), 'Filters', 'More', and a search bar. Below the navigation is a breadcrumb trail: 'Projects / Quality assurance / QA-1'. To the right of the breadcrumb are icons for a speaker, a person, a question mark, settings, and a user profile.

The main content area is titled 'Test case: Insert new comparison slide to presentation'. It includes buttons for 'Attach', 'Create subtask', 'Link issue', and an ellipsis. Below these are sections for 'To Do' (with a dropdown arrow) and 'Test steps'. The 'Test steps' section contains instructions: 'Add a new Comparison slide to the list of slides and enter two lists (one on each side). Try various formatting options to verify the rich-text feature. Specifically:' followed by a bulleted list:

- Go to *Slide management*
- Click the *plus* icon to add another slide
- In the popup, select *Comparison* for the slide type
- Confirm the dialog

Below the 'Test steps' section is a 'Expected results' section with the instruction: 'The new slide should be added to the slide list successfully. The entered content should be displayed in the preview pane. Make sure that the different formatting options are displayed correctly.'

The 'Subtasks' section at the bottom shows three items:

Subtask	Description	Status
QA-2	Failed: Could not add new slide	IN PROGRESS
QA-3	Passed: Added new comparison slide	IN PROGRESS
QA-4	Passed: Added new comparison slide	IN PROGRESS

A progress bar indicates '0% Done'.

Writing test cases in Jira using custom issue types

# Setting up Jira for tracking test scripts

---

- In a company-managed software project create a new issue type called "Test Case". Define custom fields for the issue type that are specific to test cases, such as "Expected Results" or "Test Data".
- Create a test case issue: Create a new issue for each test case that you need to track. Fill out the required fields, such as the test case name and description, and add any custom fields that you defined in the previous step.
- Add test case steps: In the "Description" field of the test case issue, add a list of steps that need to be executed for the test case. This will ensure that testers have a clear understanding of what needs to be done to execute the test case.
- Track test case status: As testers execute the test cases, they can update the status of each test case issue in Jira. For example, they can mark the test case as "Passed", "Failed", or "Blocked". This will enable stakeholders to track the progress of the testing effort.
- Use Jira reports: Jira offers several reports that can help you track test case status and progress. For example, you can generate a report that shows the number of test cases that have been executed and their status.

# Using Plug-ins for test management

- In the marketplace, <https://marketplace.atlassian.com/> find and try out different apps, e.g.:
- **Katalon** Studio and TestOps Integration
- **Tricentis**
  
- Or use the shortlist on the next slide as a jump point

ATLASSIAN Marketplace

 **Katalon**

Katalon Studio and TestOps integration  
by Katalon Studio - Best Test Automation Solution  
for Jira Cloud, Jira Server 7.0.0 - 8.25.2 and more  
★★★ 28 1,300 installs  
SUPPORTED JIRA SERVICE MANAGEMENT

Overview    Reviews    Support    Versions    Installation

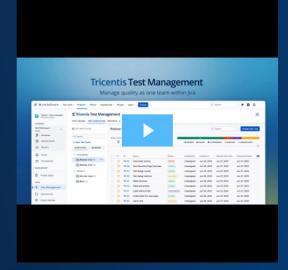
A simple and powerful test management for Jira

 **Tricentis**

Tricentis Test Management for Jira  
**End-to-end test management inside Jira**

Keep QA and development aligned in one place, and collaborate to build quality into your software from idea to production.

[Try it free](#)



<https://www.tricentis.com/products/test-management-jira>

# Top 10 test management apps 2023 shortlist by The QA Lead

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- Xray Jira test management app that uses Jira native issue types to manage testing artifacts
- TestRail All-in-one tool for tracking both manual and automated test results
- Kualitee Best for an easy-to-use dashboard
- QALity Plus Best ease of use for small teams
- Ranorex Best for test management teams of different experience levels
- Requirements and Test Management (RTM) Best for built-in requirements management
- Tricentis qTest Best for enterprise software testing
- Zephyr Squad Best for small Agile testing teams
- QADeputy Best for teams that want customization to fit their unique testing needs
- Apwide Golive
- Best for managing test environment details



<https://theqalead.com/tools/test-management-tools-for-jira/>