



Jira and Confluence Together

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06 Jul 2020 – Cloud and Server



1

Course Overview



What will you learn?



- Identify the value of using Jira and Confluence together
- Integrate Jira information in Confluence spaces
- Integrate Confluence information in Jira projects



To succeed here, you need to have



- A basic understanding of Jira
 - Creating and editing issues
 - Using project boards
 - Knowledge of JQL is helpful
- A basic understanding of Confluence
 - Creating and editing pages
 - Using macros



If you don't have experience with Jira and/or Confluence, you should still find the course useful. All of the labs should be achievable for you.

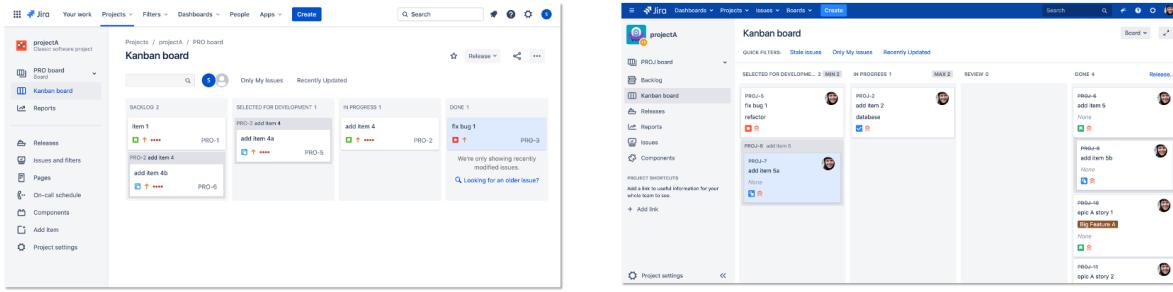
Schedule



1	Course Overview
2	Why Integrate Jira and Confluence?
3	Linking Jira Issues and Confluence Pages
4	Creating Issues in Confluence
5	Product Requirements Blueprint
6	Reporting Jira Information in Confluence



Jira Cloud vs Jira Server/Data Center



There are two main ways that a company can choose to run their Jira instance. Using Cloud, Atlassian does the work of hosting and maintaining the Jira software, so that the company can focus on their value-added activities. This is much like a company that chooses to host their email using an external service such as Google Gmail. If a company wants to host their own Jira instance, they could choose the Server or Data Center version. They can host their Jira instance in the cloud, for example using Amazon Web Services (AWS), or they can host their Jira instance in their own data center. The Server version of Jira is hosted on a single node. The Data Center version is hosted on multiple nodes, leveraging the reliability benefits of a distributed architecture.

Lab 1 – Starting Your Lab Environment

- ❑ Choose your lab environment (Server/Cloud)
- ❑ Log in to your environment



2

Why Integrate Jira and Confluence?



What will you learn?



- Identify common uses of Jira
- Identify common uses of Confluence
- Describe why to integrate Jira and Confluence
- Perform Jira and Confluence administrator setup tasks



Topics

Jira and Confluence overview

Why integrate Jira and Confluence?

Administration overview



What is Jira used for?

- Helps manage the work of a team project, broken down into *issues*
 - Add, prioritize, update, communicate and report on issues
- Visualizes the work and status of the project using *project boards, reports* and *dashboards*



What is Confluence used for?

- A team content, communication and collaboration platform
 - Effectively a versioned team website and social media platform
- Teams plan, discuss, document and broadcast the work of the project in standardized ways



Having standardized ways of documenting project knowledge is good for productivity because it is easy to start your work and you can focus on providing value to customers. The company does not need to spend time dealing with disorganized, scattered, inconsistently reported project knowledge.

Example uses of Confluence

Project content creation and sharing

Requirements, documentation, specifications, knowledge base

Status

Roadmaps, schedules, project status

Collaboration

Meeting notes, blogs, comments, idea discussions, decisions, retrospectives



Topics

Jira and Confluence overview

Why integrate Jira and Confluence?

Administration overview



Why integrate Jira and Confluence?

Single source of project knowledge

Increase productivity by avoiding overlapping, scattered and out-of-sync information

Improve the team's shared understanding of the project

Provide information to team members from the application they use

Maintain traceability

Organized, complete history of project work, conversations, decisions, etc.



Integrating Jira and Confluence provides a single source of real time project knowledge. As an example, integrating Jira and Confluence enables you to have a single piece of project knowledge in Confluence referenced in many Jira issues. If you update some information in one place, it is automatically updated everywhere that it is referenced in the project. For example, if you update the name of a Confluence page, it is automatically updated in any Jira issue that mentions the page. It's important not to have the same information (for example, product requirements) independently in Jira and Confluence, or spread among more places. This will inevitably lead to out-of-sync content and lost productivity for the team.

Having a shared understanding of the current goals, work and status of the project leads to higher productivity. Project team members, or members of other teams, can use their preferred application to see the latest project information without the need for separate status reports or meetings. Having a few simple to use tools that provide a common real-time view of all project knowledge increases team satisfaction and lets your team focus on providing value to the customer.

Why integrate Jira and Confluence?

Agile projects involve continuous change and planning- integration enables the project information to be *living*



Agile teams do not have big up-front plans.

Why integrate Jira and Confluence?

“Teams can use the strengths of Confluence for knowledge management, and the strengths of Jira for work management.”

<https://www.atlassian.com/blog/confluence/task-management-confluence-jira>



Topics

Jira and Confluence overview

Why integrate Jira and Confluence?

Administration overview



We will discuss administration tasks related to integrating Jira and Confluence. We are doing this now because in the lab you will perform some of these tasks to set up your Jira and Confluence instances.

Confluence spaces and Jira projects



In Confluence, a team's project knowledge is usually part of a single space. A space contains pages.

In Jira, a team's project issues (work items) are usually part of a single Jira project. A Jira project contains issues.

Jira and Confluence administration tasks

- Connect Jira and Confluence instances (Jira and Confluence admins)
- Create Confluence spaces (Confluence admin)
- Assign Confluence space administrators (Confluence admin)
- Create Jira projects (usually a Jira admin)
- Assign project administrators and leads (usually a Jira admin)
- Create a link between a Confluence space and the Jira project (either Jira or Confluence admin)



The first task connects the Jira and Confluence instances, enabling things like single sign-on and connecting specific Confluence spaces to Jira projects. This course focuses mainly on project and space administrator tasks.

Disclaimer

- This course provides ideas for using Jira and Confluence together
- Every agile team is unique and always changing- there often is no “right way”
- Use the Jira and Confluence tools to reflect your team’s current processes, not dictate them



As an example, we just discussed scrum roles. Many teams do not strictly use scrum and do not use those titles for roles. Your team may refer to the product owner as the product manager, or the scrum master as the development manager. Your team may also use other roles. As much as possible, Jira and Confluence are designed to be configurable to adapt to how your team currently does things.

Takeaways



- Issue management (Jira) and content creation and collaboration (Confluence) are essential to most projects.
- Integrate Jira and Confluence to inform and involve the entire team from a single source of truth.
- Integrating Jira and Confluence improves shared understanding, team satisfaction and productivity.





Lab 2- Why Integrate Jira and Confluence?

- Create a Jira project
- Add a Jira project administrator
- Create a Confluence space
- Add a Confluence space administrator
- Create a project link between the space and project
- Create a sidebar link from the Confluence space to the Jira project
- Create a sidebar link from the Jira project to the Confluence space



3 Linking Issues and Pages



What will you learn?



- Identify the value in linking Confluence pages and Jira issues
- Add links to Confluence pages in Jira issues
- Add links to Jira issues on Confluence pages



Topics

Add links to pages in issues

Add links to issues on pages



Linking a Jira issue to a Confluence Page (1 of 4)

The screenshot shows the Jira interface for creating a new story. On the left is a sidebar with project navigation links like 'MARS board', 'Backlog', 'Active sprints', 'Releases', 'Reports', 'Issues' (which is selected), and 'Components'. Below that is a 'PROJECT SHORTCUTS' section with 'Mars space'. The main area is titled 'Mars / MARS-1 add story 1'. It has tabs for 'Edit', 'Q Comment', 'Assign', and 'More'. The 'More' tab is open, showing a dropdown menu with options: 'Log work', 'Agile Board', 'Rank to Top', 'Rank to Bottom', 'Attach files', 'Voters', 'Watch issue', 'Watchers', 'Move', and 'Link'. The 'Link' option is highlighted with a red box. At the bottom of the screen, there's a 'Comments' tab selected, followed by 'Work Log', 'History', and 'Labels'.

- Use the Link feature to add a link to a Confluence page
- This provides more information related to the Jira issue

Linking a Jira issue to a Confluence Page (2 of 4)

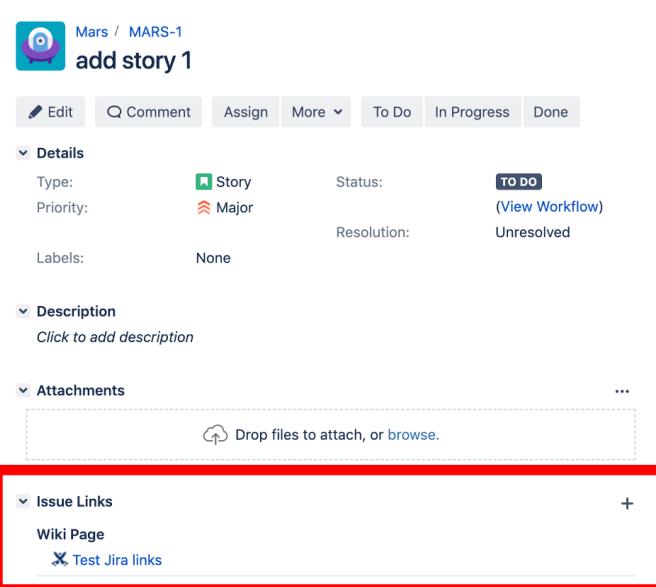
Link

Jira Issue	Enter a Confluence page URL to link this issue to
Confluence Page	Page URL <input type="text" value="http://"/> or search for a page
Web Link	Comment Style I <u>U</u> A ^{A^o} Visual Text Viewable by All Users
<input type="button" value="Link"/> <input type="button" value="Cancel"/>	

Can paste a page's URL or perform a search



Linking a Jira issue to a Confluence Page (3 of 4)



The screenshot shows the Jira 'add story' interface for a project named 'Mars' under issue 'MARS-1'. The 'Issue Links' section is highlighted with a red box. It contains two entries: 'Wiki Page' and 'Test Jira links'. A blue 'A' logo is visible in the bottom right corner.

Mars / MARS-1
add story 1

Edit Comment Assign More To Do In Progress Done

Details

Type:	Story	Status:	TO DO (View Workflow)
Priority:	Major	Resolution:	Unresolved
Labels:	None		

Description
Click to add description

Attachments
Drop files to attach, or browse.

Issue Links

- Wiki Page
- Test Jira links

- Linked pages show under Issue Links
- Can navigate directly to the page
- Changes to the page's location or title are automatically reflected
- Can click + to link more pages

Linking a Jira issue to a Confluence Page (4 of 4)

The screenshot shows a Confluence page titled "Test Jira links". At the top, there is a header with "Dashboard / Mars Home" and a "1 Jira link" badge. Below the header, the page content includes a section titled "Jira links" with a "Issues" button and a link to "MARS-1 TO DO". A red box highlights this "Jira links" section. At the bottom of the page, there is a "Write a comment..." input field.

The associated
Confluence page
contains a link to the
Jira issue



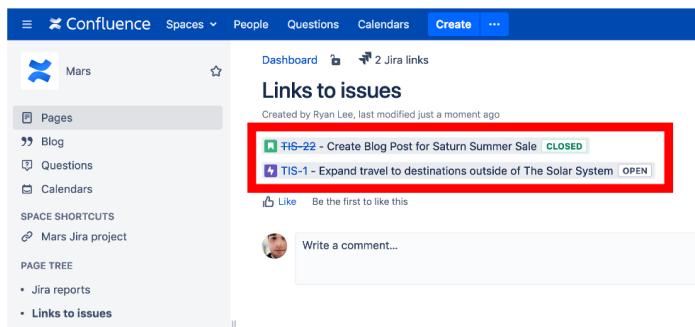
Topics

Add links to pages in issues

Add links to issues on pages



Use the Jira Issue/Filter Macro to link to issues (1 of 6)

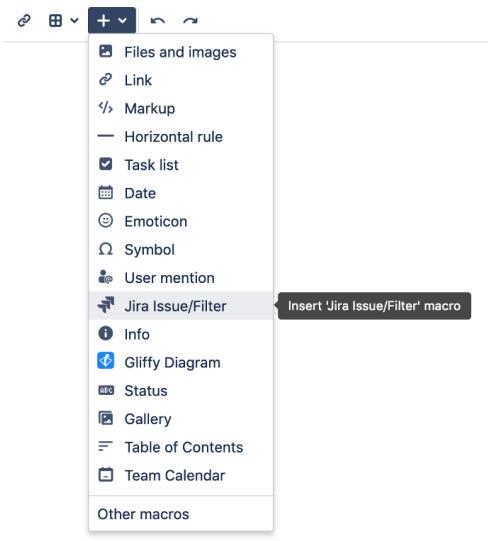


The screenshot shows a Confluence page titled 'Links to issues'. It lists two Jira issues: '#TIS-22 - Create Blog Post for Saturn Summer Sale' (status: CLOSED) and '#TIS-1 - Expand travel to destinations outside of The Solar System' (status: OPEN). A red box highlights these two entries.

- What?
 - On Confluence pages, add links to related Jira issues
- Why?
 - Creates a convenient link to the issue
 - Automatically provides the current status of the issue (a living document)
 - Automatically adds a link to the page in the Issue Links section of the Jira issue



Use the Jira Issue/Filter Macro to link to issues (2 of 6)



- How?
 - Edit a Confluence page
 - + (Insert more content)
 - Jira Issue/Filter macro

macros enable you to add extra functionality or include dynamic content on a Confluence page



Use the Jira Issue/Filter Macro to link to issues (3 of 6)

The screenshot shows the 'Insert Jira Issue/Filter' dialog box. On the left, there's a sidebar with 'Search', 'Create New Issue', 'Recently Viewed', 'OTHER JIRA CONTENT', and 'Jira Charts'. The main area has a search bar with 'expand travel' typed in, a 'Key' checkbox checked, a 'Summary' checkbox unchecked, and a result for 'TIS-1'. Below the search bar is a 'Display options' section with a dropdown arrow. At the bottom, it says 'Select Macro Hint: type "Cmd+Shift+J" in the editor to quickly access this dialog.' with 'Insert' and 'Cancel' buttons.

- How?
 - Edit a page
 - + (Insert more content)
 - Jira Issue/Filter macro
 - **Search for the issue(s)- use any issue key, search URL, Jira link, JQL, plain text or filter**



Use the Jira Issue/Filter Macro to link to issues (4 of 6)

Insert Jira Issue/Filter

Search expand travel

Create New Issue

Recently Viewed

OTHER JIRA CONTENT

Jira Charts

Display options

Display as Single issue
Display the macro as a single issue.

Total issue count
Display total number of Issues as a link. E.g. 1 Issues

Table
Customise your columns below.

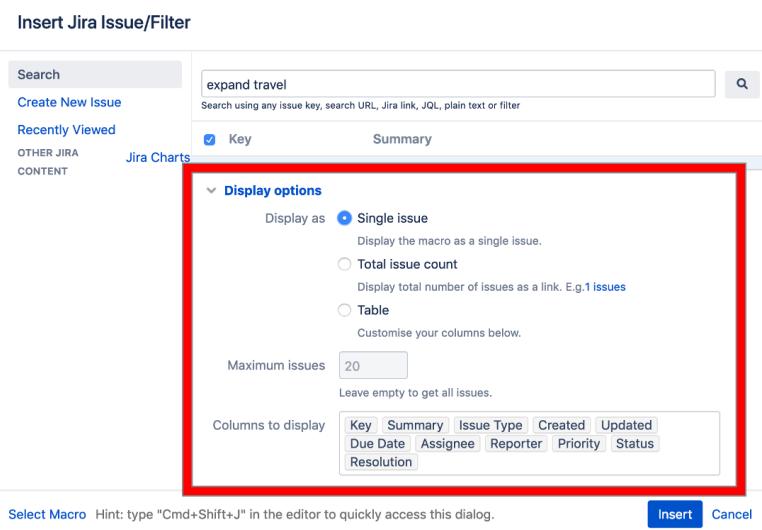
Maximum issues 20

Leave empty to get all issues.

Columns to display Key Summary Issue Type Created Updated Due Date Assignee Reporter Priority Status Resolution

Select Macro Hint: type "Cmd+Shift+J" in the editor to quickly access this dialog.

Insert Cancel



- How?
 - Edit a page
 - + (Insert more content)
 - Jira Issue/Filter macro
- Search for the issue(s)-use any issue key, search URL, Jira link, JQL, plain text or filter
- Configure Display options
- Click Insert



Use the Jira Issue/Filter Macro to link to issues (5 of 6)

Dashboard 🔒 2 Jira links

Links to issues

Created by Ryan Lee

 TIS-22 - Create a blog post for the summer sale

 TIS-1 - Expand travel to destinations outside of The Solar System

 Like Be the first to like this



Write a comment

Jira links

 Epics

[Beyond the Solar System](#)

Expand travel to destinations outside of The Solar System

[OPEN](#)

 Issues

[TIS-22 CLOSED](#)

Create Blog Post for Saturn Summer Sale

Automatically adds a clickable link listing Jira links on the page



Use the Jira Issue/Filter Macro to link to issues (6 of 6)

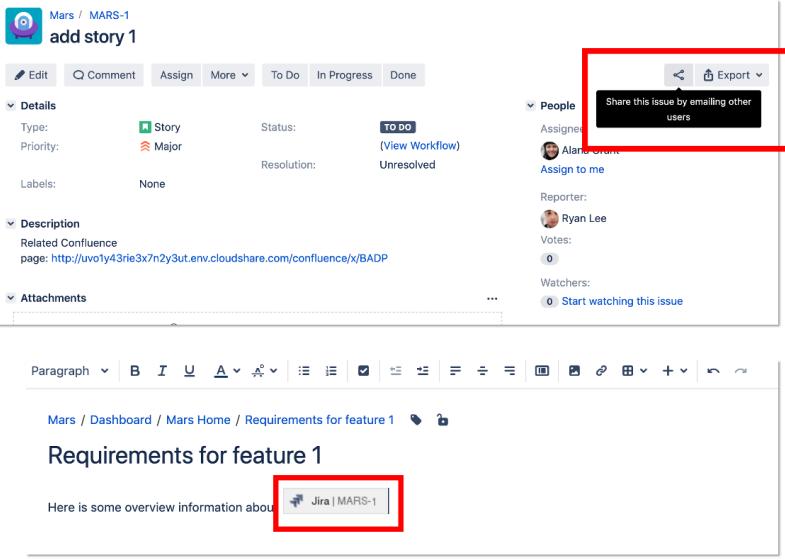
The screenshot shows a Jira issue page for an epic titled "Expand travel to destinations outside of The Solar System". The sidebar on the left is for the project "Teams in Space" and shows the "Issues" tab is selected. The main content area displays the epic's details, including its type as an Epic, priority as Major, and status as OPEN. Below the details, there is a section titled "Issue Links" with a sub-section "mentioned in". Under "mentioned in", there is a link labeled "Links to issues".

Automatically adds a link to the page in the Issue Links section of the Jira issue



This is a convenient way to obtain more context on the issue.

Auto-convert Jira issue URLs on Confluence pages



The screenshot shows a Jira issue page for 'Mars / MARS-1'. The top navigation bar includes 'Edit', 'Comment', 'Assign', 'More', 'To Do', 'In Progress', and 'Done'. Below this, there's a 'Details' section with fields for Type (Story, Major), Status (TO DO, View Workflow), Priority, Resolution (Unresolved), and Labels (None). A 'Description' section contains a link to a Related Confluence page. An 'Attachments' section is also present. On the right side, there's a 'People' section with fields for Assignee (Alice Brown), Reporter (Ryan Lee), Votes (0), and Watchers (0). A button labeled 'Share this issue by emailing other users' is highlighted with a red box. At the bottom, a rich text editor toolbar is shown, followed by a Confluence page titled 'Requirements for feature 1' containing some text and a Jira macro.

Paste a Jira issue URL
on a Confluence
page and it auto-
converts to a proper
Jira link



You can copy the URL to a Jira issue using the share icon for the issue. You then can paste the URL into a Confluence page and the Jira link will appear as if you used the Jira issue/filter macro.



Takeaways

- Jira and Confluence have out-of-the-box linking capabilities
- Changes to linked pages or issues are automatically reflected in the links
- In Jira, use the Link feature of Jira issues to link to Confluence pages
- In Confluence, use the Jira Issue/Filter macro or autoconvert to link to Jira issues





Lab 3- Linking Issues and Pages

- Create a Confluence page
- Add links to Confluence pages in Jira issues
- Add links to Jira issues on Confluence pages



4

Creating Jira Issues Using Confluence



What will you learn?



- Use the Jira Issue/Filter macro in Confluence to create Jira issues
- Create multiple Jira issues from a Confluence table
- Insert a dynamic list of Jira issues on a Confluence page



Topics

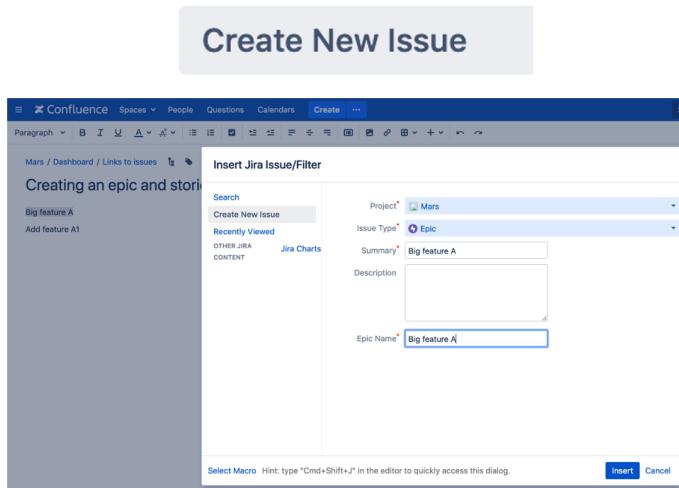
Create single issues using Confluence

Create multiple issues using Confluence

Insert a dynamic list of issues on a
Confluence page



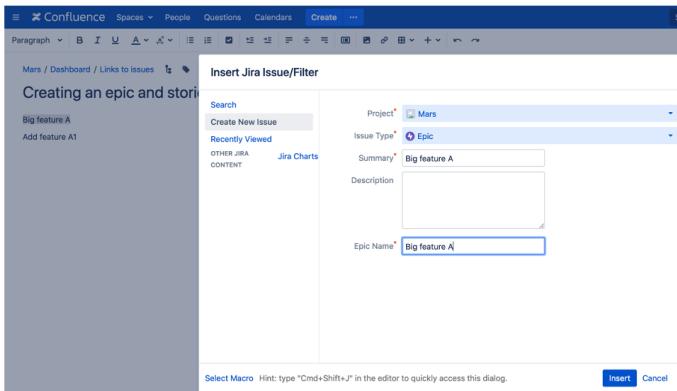
Use the Jira Issue/Filter Macro to create issues (1 of 2)



- **What?**
 - Create a Jira issue while editing a Confluence page
 - Results in an issue in Jira with a link on the Confluence page
- **Why?**
 - The user would prefer to use Confluence
 - The issue metadata (for example, summary) already exists in Confluence



Use the Jira Issue/Filter Macro to create issues (2 of 2)



- How?

- (optional) In edit mode, select some text on the page
- Use the Jira Issue/Filter macro
- Select Create New Issue
- Enter project, issue type, etc. (if you selected text to start, it is used as the Summary)
- Click Insert



Topics

Create single issues with Confluence

Create multiple issues with Confluence

Insert a dynamic list of issues on a
Confluence page

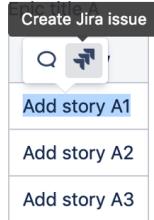


Create issues in view mode of a Confluence page (1 of 10)

Dashboard 

Create issues in view mode

Created by Ryan Lee just a moment ago



- What?
 - Create an issue in view mode of a page by selecting text and clicking the Jira icon
 - (optional) Create multiple issues at once by selecting text in a table
 - Results in issue(s) in Jira with a link on the Confluence page
- Why?
 - An alternative to creating issues in edit mode
 - Create multiple issues at one time (if from a table)
- Who?
 - Any team member who can edit pages (this results in an automatic page edit and publish) and can create issues

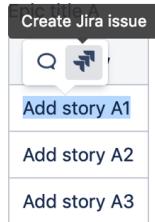


Create issues in view mode of a Confluence page (2 of 10)

Dashboard 

Create issues in view mode

Created by Ryan Lee just a moment ago



- How?

- Add text (optionally in a table)
- Publish the page
- Highlight text
- Select the Create Jira issue icon



Create issues in view mode of a Confluence page (3 of 10)

Create issues in view mode

Created by Ryan Lee, last modified 29 minutes ago

Epic A

Create task



Mars



Epic

Summary* Epic A

Description

Epic Name* Epic A

[Create](#) [Cancel](#)

- How?

- Add text (optionally in a table)
- Publish the page
- Highlight text
- Select the Create Jira issue icon
- **Enter the issue metadata**
- **Click Create**



Create issues in view mode of a Confluence page (4 of 10)

Create issues in view mode

Created by Ryan Lee, last modified Mar 13, 2019 18:26

Epic A MARS-36 TO DO

Summary
Add story A1
Add story A2
Add story A3

Like Be the first to like this

- How?
 - Add text (optionally in a table)
 - Publish the page
 - Highlight text
 - Select the Create Jira issue icon
 - Enter the issue metadata
 - Click Create
- **The issue is created in Jira with a link added to the page (no editing or publishing required)**



Create issues in view mode of a Confluence page (5 of 10)

- How?
 - To create multiple issues from a table, highlight a single summary
 - Click the Jira icon

Create issues in view mode

Created by Ryan Lee, last modified Mar 13, 2019 18:26

The screenshot shows a 'Create Jira issue' dialog box overlaid on a Confluence page. The dialog has a dark header bar with the text 'Create Jira issue' and a 'TO DO' button. Below the header are two small icons: a magnifying glass and a Jira logo. The main body of the dialog contains three buttons labeled 'Add story A1', 'Add story A2', and 'Add story A3'.



Create issues in view mode of a Confluence page (6 of 10)

Create issues in view mode

Created by Ryan Lee, last modified Mar 13, 2019 18:26

Epic A MARS-36 TODO

Summary

Add story A1

Create task

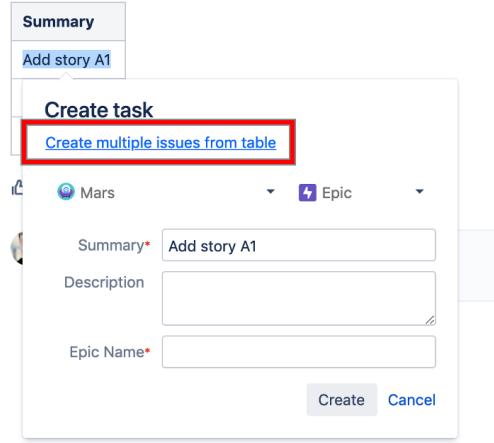
[Create multiple issues from table](#)

Mars Summary* Add story A1

Description

Epic Name*

Create Cancel



- How?
 - To create multiple issues from a table, highlight a single summary
 - Click the Jira icon
 - **Because the text is in a table, Confluence adds the Create multiple issues from table link**



Create issues in view mode of a Confluence page (7 of 10)

The screenshot shows the 'Create issues in view mode' dialog. At the top, it says 'Dashboard 1 Jira link'. Below that is the title 'Create issues in view mode' and a note 'Created by Ryan Lee, last modified just a moment ago'. Underneath is a 'Summary' section with 'Add story A1'. A large button labeled 'Create multiple issues' is prominent. To its right is a 'Create single issue' button. Below these are dropdown menus for 'Summary' (set to 'Summary') and 'Story'. A 'Description' field is also present. At the bottom, it says 'Following issues will be created:' followed by three items: 'Add story A1', 'Add story A2', and 'Add story A3'. There is a checkbox for 'Link to epic' which is checked, and next to it is a Jira icon with the text 'MARS-36'. At the very bottom are 'Create' and 'Cancel' buttons.

- How?
 - To create multiple issues from a table, highlight a single summary
 - Click the Jira icon
 - Because the text is in a table, Confluence adds the Create multiple issues from table link
 - **Three issues will be created, with a summary corresponding to the text in the Summary column**

Create issues in view mode of a Confluence page (8 of 10)

The screenshot shows the 'Create issues in view mode' dialog. It displays a table with three rows: 'Summary' (selected), 'Add story A1', and 'Add story A2'. Below the table, it says 'Following issues will be created:' with three items: 'Add story A1', 'Add story A2', and 'Add story A3'. At the bottom, there are 'Create' and 'Cancel' buttons. A red box highlights the 'Link to epic MARS-36' button.

- How?
 - To create multiple issues from a table, highlight a single summary
 - Click the Jira icon
 - Because the text is in a table, Confluence adds the Create multiple issues from table link
 - Three issues will be created, with a summary corresponding to the text in the Summary column
 - **Because there is a single link to an epic on the page, Confluence provides the option to link created issues to that epic**
 - **Click Create to create the three issues and link to them on this page**

Create issues in view mode of a Confluence page (9 of 10)

Dashboard 🔒 4 Jira links

Create issues in view mode

Created by Ryan Lee, last modified just a moment ago

Epic A ⚡ MARS-36 TO DO

Summary
Add story A1 📈 MARS-43 TO DO
Add story A2 📈 MARS-44 TO DO
Add story A3 📈 MARS-45 TO DO

- How?

- To create multiple issues from a table, highlight a single summary
- Click the Jira icon
- Because the text is in a table, Confluence adds the Create multiple issues from table link
- Three issues will be created, with a summary corresponding to the text in the Summary column
- Because there is a single link to an epic on the page, Confluence provides the option to link created issues to that epic
- Click Create to create the three issues and link to them on this page
- **Here's the result of creating an epic with three issues using Confluence**



Create issues in view mode of a Confluence page (10 of 10)

The screenshot shows the Jira interface in view mode. On the left, there's a sidebar with project navigation: Mars board, Backlog, Active sprints, Releases, Reports, Issues (which is selected), Components, PROJECT SHORTCUTS, and Mars Space. The main area is titled "Epic A" under the "Mars / MARS-36" project. It shows basic details: Type: Epic, Priority: Major, Labels: None, and Epic Name: Epic A. Below these are sections for Description (with a placeholder "Click to add description") and Attachments (with a placeholder "Drop files to attach, or browse..."). Under Issue Links, it says "mentioned in" and lists "Create issues in view mode". A red box highlights the "Issues in Epic" section, which contains three items: MARS-43 Add story A1, MARS-44 Add story A2, and MARS-45 Add story A3, all assigned to Alana Grant and in the TO DO status.

Verify that the issues have been created in Jira

Topics

Create single issues with Confluence

Create multiple issues with Confluence

**Insert a dynamic list of issues on a
Confluence page**



Inserting a dynamic list of issues of an epic (1 of 3)

Use JQL to search for issues of the epic

The screenshot shows the Confluence editor interface with the 'Insert Jira Issue/Filter' dialog open. The search bar contains the JQL query "epic link = MARS-01". The results table displays three issues: MARS-4, MARS-3, and MARS-2, each with a summary like "Add feature A3", "Add feature A2", and "Add feature A1" respectively.

We have replaced the hard-coded approach to listing issue with a dynamic approach, using JQL.

Inserting a dynamic list of issues of an epic (2 of 3)

Use Display options to define the columns of the table

Display options

Display as Single issue
Display the macro as a single issue.

Total issue count
Display total number of issues as a link. E.g. [4 issues](#)

Table
Customise your columns below.

Maximum issues
Leave empty to get all issues.

Columns to display



Inserting a dynamic list of issues of an epic (3 of 3)

- Click Refresh to ensure that you see the very latest information

The screenshot shows a Jira interface with a blue header bar containing 'People', 'Questions', 'Calendars', 'Create', and a three-dot menu. To the right of the header are 'Search', a magnifying glass icon, a question mark icon, a help icon, and a user profile icon. Below the header, the title 'Epic issues' is displayed. A table follows, with columns: Key, Summary, T, Created, Updated, Due, Assignee, Reporter, P, Status, and Resolution. Three rows of data are shown:

Key	Summary	T	Created	Updated	Due	Assignee	Reporter	P	Status	Resolution
MARS-4	Add feature A3	BUG	Mar 14, 2019	Mar 14, 2019		Alana Grant	Ryan Lee	✗	TO DO	Unresolved
MARS-3	Add feature A2	BUG	Mar 14, 2019	Mar 14, 2019		Alana Grant	Ryan Lee	✗	TO DO	Unresolved
MARS-2	Add feature A1	BUG	Mar 14, 2019	Mar 14, 2019		Alana Grant	Ryan Lee	✗	TO DO	Unresolved

At the bottom left of the table area, it says '3 issues' and has a 'Refresh' button.



If a user adds an issue to the epic using a different Confluence page or in Jira itself, this table will be updated. This is because the table is generated from a JQL query.

Basic and advanced search

Basic

The screenshot shows the Jira Software interface. On the left, there's a sidebar with 'Jira Software' at the top, followed by 'Dashboards', 'Projects', 'Issues and filters' (which is selected and highlighted in blue), and 'Settings'. The main area is titled 'All issues' with a 'Save as' button. Below the title are several filter dropdowns: 'Project: All', 'Type: All', 'Status: All', 'Assignee: All', 'Contains text' (with a search icon), 'More', and an 'Advanced' link. At the bottom of the main area, it says '1-29 of 29' with a refresh icon. Below the main area are three columns: 'T' (Ticket), 'Key', and 'Summary'. At the bottom right are buttons for 'Assignee', 'Reporter', 'P' (Priority), and 'Status'. A small 'Basic' link is visible in the top right corner of the main search area.

Advanced/JQL

This screenshot shows the same Jira interface as above, but with an advanced search. The 'Issues and filters' option in the sidebar is still selected. In the main search area, there's a text input field containing the JQL query 'order by created DESC'. This field has a 'Basic' link next to it. The rest of the interface is identical to the basic search view, including the filter dropdowns, the '1-29 of 29' count, and the column headers 'T', 'Key', and 'Summary'.



If you need to paste a JQL query into Confluence, it is suggested that you execute the query first in Jira, instead of troubleshooting a query in Confluence. This is because Jira has very powerful features that make writing JQL queries easy. For example, you can execute a query using basic search, then click on the Advanced link to view the JQL. You can simply copy and paste that JQL to your Confluence page.

"Writing" JQL - the easiest way

The screenshot shows two panels of the Jira search interface. The left panel displays a basic search results page for 'projectA' with three issues: PROJ-3, PROJ-2, and PROJ-1. The right panel shows the 'Advanced' search results page with the same three issues, but with a specific JQL query displayed at the top: `project = PROJ order by created DESC`. This demonstrates how to copy the generated JQL query from the search interface.

projectA Type: All Status: All Assignee: All Contains text More Advanced

1–3 of 3 ⓘ

T	Key	Summary	Assignee	Reporter	P	Status
PROJ-3	add feature 3	Steve Byrnes	Steve Byrnes	↑	DONE	
PROJ-2	add feature 2	Steve Byrnes	Steve Byrnes	↑	BACKLOG	
PROJ-1	add feature 1	Steve Byrnes	Steve Byrnes	↑	DONE	

1–3 of 3 ⓘ

All issues — Edited Save as ⏯

project = PROJ order by created DESC

1–3 of 3 ⓘ

T	Key	Summary
PROJ-3	add feature 3	
PROJ-2	add feature 2	
PROJ-1	add feature 1	

1–3 of 3 ⓘ

A blue Atlassian logo is visible in the bottom right corner of the interface.

Here we have first executed a query in basic search, then click on the Advanced link. The resulting query can be pasted to Confluence.

Takeaways



- You can use the Jira Issue/Filter macro in Confluence to create Jira issues
- You can create multiple Jira issues from a Confluence table
- Use the Jira Issue/Filter macro to insert a dynamic list of issues on a Confluence page





Lab 4- Creating Issues in Confluence

- Create a Jira epic using the Jira Issue/Filter macro in Confluence
- Create multiple Jira stories from a Confluence table in view mode
- Display a dynamic list of Jira issues on a Confluence page



5

Product Requirements Blueprint



What will you learn?



- Use the product requirements blueprint in Confluence



Blueprints

- A blueprint is a template with more functionality than standard page templates
- Example blueprints include blog posts, decisions, meeting notes, retrospectives and product requirements
 - These are all collections of similar pages for your project
 - Usually, an index page is created along with individual pages

Mars / Dashboard / Mars Home / Product page for Big feature A

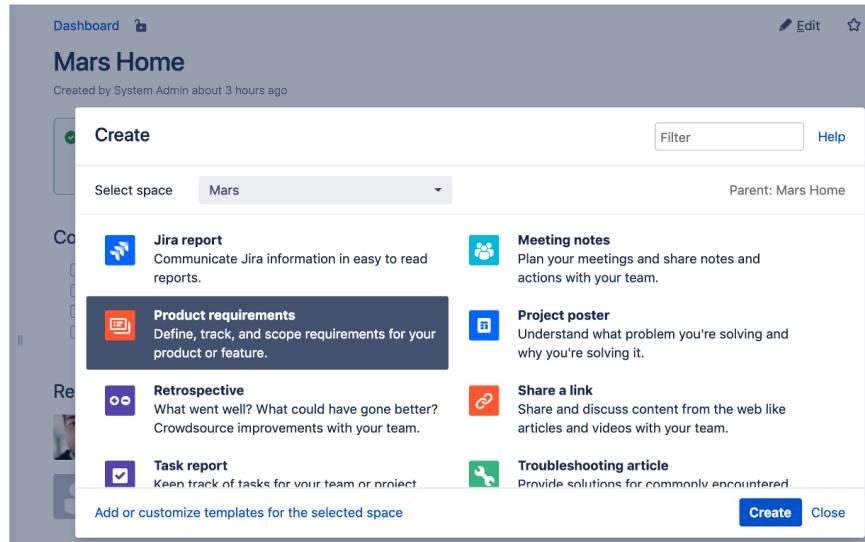
Product page for Big feature A

Target release	1.0
----------------	-----



A blueprint includes developer code to add unique functionality to the pages created.

The Product Requirements blueprint



The screenshot shows the Jira 'Create' dialog for a space named 'Mars Home'. The 'Select space' dropdown is set to 'Mars'. The 'Parent' field shows 'Parent: Mars Home'. The 'Create' button is visible at the bottom right. The dialog lists several template options:

- Jira report**: Communicate Jira information in easy to read reports.
- Product requirements**: Define, track, and scope requirements for your product or feature. This option is highlighted with a dark blue background.
- Meeting notes**: Plan your meetings and share notes and actions with your team.
- Project poster**: Understand what problem you're solving and why you're solving it.
- Retrospective**: What went well? What could have gone better? Crowdsource improvements with your team.
- Share a link**: Share and discuss content from the web like articles and videos with your team.
- Task report**: Keep track of tasks for your team or project.
- Troubleshooting article**: Provide solutions for commonly encountered issues.

At the bottom left is a link 'Add or customize templates for the selected space'. At the bottom right are 'Create' and 'Close' buttons.



We will use the product requirements blueprint.

A single product requirements page

The screenshot shows a Jira Confluence product page for 'Big feature A'. At the top, there's a toolbar with various icons for editing. Below it is a breadcrumb navigation: Mars / Dashboard / Mars Home / Product page for Big feature A. The main title is 'Product page for Big feature A'. Underneath the title is a 'Page properties' section containing the following information:

Target release	1.0
Epic	(empty)
Document status	DRAFT
Document owner	@Ryan Lee

Below the properties is a 'Goals' section with a single bullet point: 'Add big feature A'.

A page template is provided as a start for your project page

- Customizable
- Click on the Epic row to bring up the Insert Jira Issue/Filter macro...
 - Can link to or create Jira issues
 - Can display a dynamic list of Jira issues



We will assume that we use one product page for each epic in the page.

A published product requirements page

The screenshot shows a published product requirements page in a Confluence space named "Mars". The left sidebar includes links for Pages, Blog, Questions, Calendars, SPACE SHORTCUTS (Mars Jira project, Product requirements), and PAGE TREE (Product page for Big feature A, Product requirements, Project overview). The main content area displays the title "Product page for Big feature A", created by Ryan Lee just a moment ago. It includes a summary table with columns for Target release (1.0), Epic (MARS-1 - Big feature A, status TO DO), Document status (DRAFT), and Document owner (@Ryan Lee). Below the table, the "Goals" section lists "Add big feature A". The "Background and strategic fit" section is present but empty.

Target release	1.0
Epic	MARS-1 - Big feature A TO DO
Document status	DRAFT
Document owner	@Ryan Lee

The product requirements index page

- Contains metadata (from each page's table) for all product requirements pages in the project
- Automatically generated

The screenshot shows a Confluence page titled "Product requirements". The left sidebar has a "Pages" section with two items highlighted by red boxes: "Product page for Big feature A" and "Product requirements". The main content area displays a table with one row for "Product page for Big feature A". The table columns are: Title, Document owner, Document status, Epic, and Target release. The data is: Title - "Product page for Big feature A", Document owner - "@Ryan Lee", Document status - "DRAFT", Epic - "MARS-1 - Big feature A [TO DO]", Target release - "1.0". Below the table is a "Like" button and a "Write a comment..." input field.

The next time the product requirements blueprint is used, a page will be added to this index page.



Lab 5- Product Requirements Blueprint

- Use the product requirements blueprint
- Add a link to a Jira epic in a product requirements page
- Create a product requirements page for a new epic



6

Reporting Jira Information in Confluence



What will you learn?



- Add a Jira chart to a Confluence page
- Add a Jira reporting page to a Confluence space



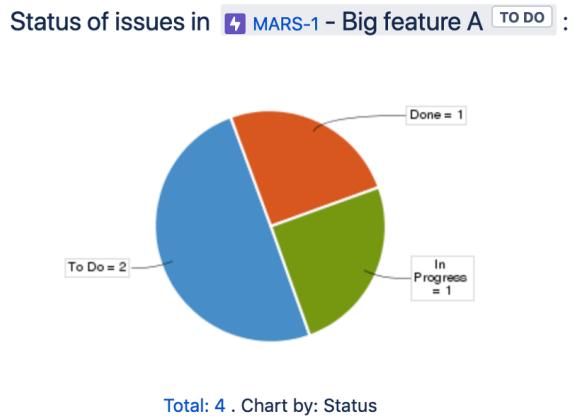
Topics

Jira charts macro

Jira report blueprint



Jira Charts macro- overview



- What?
 - Add Jira charts to part of a Confluence page
- Why?
 - Provides graphical, live Jira information in Confluence
- Who?
 - Users who can edit Confluence pages can create the charts
 - Viewers of the chart only see issues that they have permission to see



Jira Charts macro

The screenshot shows the 'Select macro' dialog in Confluence. On the left, a sidebar lists categories: All, Administration, Communication, Confluence content, Development, External content, Formatting, Media, Navigation, Reporting, Visuals & images, and Hidden. The 'All' category is selected. In the main area, there are several macro cards. One card, 'Jira Charts', is highlighted with a red border. It features a icon of a chart with a gear, the text 'Jira Charts', and the description 'Display Jira information on your page as a chart.' Other visible cards include 'Info', 'Jira', 'JUnit Report', 'Labels List', 'Livesearch', 'Lorem ipsum', and 'Multimedia'. At the bottom left is a link 'Find more macros...', and at the bottom right is a 'Cancel' button.

The Jira Charts macro may be under Other macros.

Jira Charts macro- inserting a pie chart

Insert Jira Chart

The screenshot shows the 'Insert Jira Chart' dialog. On the left, there's a sidebar with categories: 'Pie Chart' (selected), 'Created vs Resolved', 'Two Dimensional', 'OTHER JIRA CONTENT', and 'Jira Issue/Filter'. The main area displays a pie chart with three slices: blue ('To Do = 2'), green ('In Progress = 1'), and orange ('Done = 1'). Above the chart, a search bar contains the query '!Epic Link = MARS-1'. Below the chart are 'Display options' settings, including 'Chart by Status' (selected), a width input field, and two checkboxes for 'Show border' and 'Show chart information'. At the bottom right are 'Insert' and 'Cancel' buttons.

The search defines which issues appear in the chart

Display options > Chart by defines what the pie slices represent

Jira Charts macro- two dimensional

Insert Jira Chart

Pie Chart
Created vs Resolved
Two Dimensional
OTHER JIRA
CONTENT Jira
Issue/Filter

"Epic Link" = MARS-1
Search using any issue key, search URL, Jira link, JQL, plain text or filter

Assignee	Status			
	IN PROGRESS	DONE	TO DO	T:
Alana Grant	1	1	2	4
Total Unique Issues:	1	1	2	4
Showing 1 of 1 statistics.				

Display options

Preview

Select Macro

Insert Cancel

Select **Two Dimensional**
to view the results as a
table



Topics

Jira charts macro

Jira report blueprint



Jira Report blueprint- overview

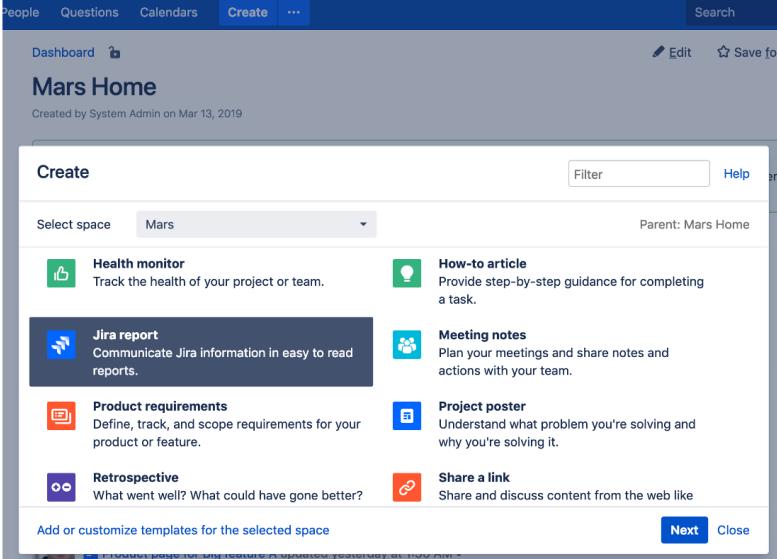
The screenshot shows a Confluence page titled "Jira report- Mars project". The page has a header with "Confluence", "Spaces", "People", "Questions", "Calendars", "Create", "Search", and a magnifying glass icon. On the left, there's a sidebar with "Pages", "Blog", "Questions", "Calendars", "SPACE SHORTCUTS" (including "Mars Jira project"), "Product requirements", and "Jira reports". Below that is a "PAGE TREE" section with items like "Jira report- Mars project", "Jira reports", "Product page for Big feature A", "Product requirements", and "Project overview". The main content area has a title "Jira report- Mars project" and a subtitle "Created by Alana Grant just a moment ago". It shows three cards: "Date Mar 15, 2019", "Issues 5 issues", and "Status GREEN". Below these are sections for "Report summary", "Overall status for 5 issues" (with a pie chart showing 3 To Do, 1 Done, and 1 In Progress), and "Priority" (with a pie chart showing 5 Major). There are also "Edit", "Save for later", and "Watching" buttons.

Uses the Jira charts macro and other macros on a single customizable page



The Jira report blueprint allows you to add a customizable Confluence page containing information from the Jira project.

Jira Report blueprint



The screenshot shows the Jira 'Create' dialog box. At the top, there's a navigation bar with 'People', 'Questions', 'Calendars', 'Create', and a three-dot menu. A search bar is on the right. Below the bar, it says 'Dashboard' and 'Mars Home'. A note indicates it was created by System Admin on Mar 13, 2019. The main area is titled 'Create' with a 'Filter' and 'Help' button. A dropdown menu shows 'Select space' set to 'Mars'. To the right, it says 'Parent: Mars Home'. The central part lists several template options: 'Health monitor' (Track the health of your project or team), 'How-to article' (Provide step-by-step guidance for completing a task), 'Meeting notes' (Plan your meetings and share notes and actions with your team), 'Jira report' (Communicate Jira information in easy to read reports, highlighted with a dark blue background), 'Product requirements' (Define, track, and scope requirements for your product or feature), 'Project poster' (Understand what problem you're solving and why you're solving it), 'Retrospective' (What went well? What could have gone better?), and 'Share a link' (Share and discuss content from the web like). At the bottom left is a link 'Add or customize templates for the selected space'. On the right are 'Next' and 'Close' buttons. A small blue 'Atlassian' logo is in the bottom right corner of the dialog.

Use the Jira report option when creating a page.

Jira Report blueprint- status report

Select report type

Change log

Create a report with a list of Jira issues for a project, release or specific query.

Status report

Create a report with charts to communicate the status of your release with stakeholders.

About Jira reports

Communicate Jira information in easy to read reports.

Back

Next

Close



You are given the option of creating a change log page or a status report page.

Configuring a Jira status report

Create a status report

Project* Mars

Fix version(s) Leave empty to get all versions

Switch to advanced

Title Jira report- Mars project

Back Create Close

About status reports

Visually communicate the overall progress of your project with your stakeholders. Generate charts from a saved search, Jira URL or JQL query.

- Select the project that you want to report on
- Enter a report title



The queries in the initial report will be based on the project that you select here. You could also click Switch to advanced to enter a more advance criteria, such as basing the report only on a single epic.

Jira status report- editing the report

Mars / Dashboard / Mars Home DRAFT

Jira report- Mars project

Page properties label = jirareport	
Date	Mar 15, 2019
Issues	 5 issues
Status	GREEN

Edit the text and macros on the report to suit your project



The status report contains many macros is completely editable. This page properties table includes an Jira Issue/Filter macro and a Status macro.

Jira status report- advanced mode (1 of 2)

The screenshot shows the Jira interface for creating a status report. At the top, there's a navigation bar with 'People', 'Questions', 'Calendars', 'Create', and a search bar. Below that, the URL is 'Dashboard / Mars Home'. The main title is 'Jira report- Big Feature A epic', with a note 'Created by Alana Grant just a moment ago'. On the left, a sidebar says 'Create a status report'. In the center, there's a 'Jira Query' field containing '"Epic Link" = MARS-1'. Below it is a link 'Switch to simple'. Underneath is a 'Title' field with 'Jira report- Big Feature A'. To the right, there's a section titled 'About status reports' with a description: 'Visually communicate the overall progress of your project with your stakeholders. Generate charts from a saved search, Jira URL or JQL query.' At the bottom right are 'Back', 'Create' (which is highlighted in blue), and 'Close' buttons.

Use the advanced mode of the Jira report blueprint to enter the starting JQL query for the report



Enter the starting query for the macros in the report. Here the report is only for issues from a single epic.

Jira status report- advanced mode (2 of 2)

Screenshot of a Jira status report in Confluence Advanced mode:

The dashboard shows the following details:

- Date:** Mar 15, 2019
- Issues:** 4 issues
- Status:** GREEN

Report summary:

Overall status for 4 issues:

Status	Count
To Do	2
In Progress	1
Done	1

Priority:

Priority	Count
Major	4

Here is the resulting status report for a single epic



Takeaways



- Use the Jira charts macro to display single Jira charts in Confluence
- Use the Jira Report blueprint in Confluence to create a customizable, graphic page containing information related to Jira issues





Lab 6 – Reporting Jira Information in Confluence

- Plan and start a sprint
- Add a Jira chart to a Confluence page
- Add a Jira reporting page to the Confluence space



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- Introduces essential concepts
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- The app also keeps track of users' progress so they can see where they left off, and so managers can track the progress of their teams.

The Tutorials...

- Cover popular topics and tasks
- Introduce essential concepts
- Showcase in-product demos
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- Search for "Training for Jira" from marketplace.atlassian.com to download a free trial.
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- Note: If you're using a firewall or have network restrictions where Jira is installed, you may need to whitelist IP addresses to access this app.

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General Online Community	community.atlassian.com
Documentation	confluence.atlassian.com
Support	support.atlassian.com
Enterprise Services	atlassian.com/enterprise/services
More Resources	atlassian.com/resources
The Atlassian Team Playbook	atlassian.com/team-playbook



If you want to learn more, here are some additional resources to help.

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