JIRA Agile Essentials

JIRA Agile (formerly known as GreenHopper) is a plugin that adds agile project management to any JIRA project. It allows you to visualize your existing process and stimulate incremental improvement. JIRA Agile brings the power of agile methodology to Atlassian JIRA.

With JIRA Agile Essentials you will dive straight into the action, exploring critical agile terminologies and concepts in the context of JIRA Agile. Learn to install and run JIRA Agile, and set it up to run with Scrum and Kanban. Collaborate with your colleagues to define requirements, create user stories, and manage and plan sprints based on the availability of your members. Create reports and share your project progress with other stakeholders.

With this practical guide, you will develop a great working knowledge of JIRA Agile and make your project management much more efficient.

Who this book is written for

If you want to get started with JIRA Agile and learn how to run your JIRA projects the agile way, then this is the perfect book for you. You will need to be familiar with the basics of JIRA, both from an end user's and an administrator's perspective. Experience with workflows, custom fields, and other administrative functions of JIRA will be useful.

What you will learn from this book

- Understand how JIRA Agile and JIRA work together
- Install JIRA Agile and extend it beyond project tracking
- Manage and run your JIRA projects with Scrum or Kanban
- Customize your agile boards to adapt to your team's workflow process
- Create and share project statuses with amazing charts
- Plan your sprints with JIRA Agile and Team Calendar
- Integrate JIRA Agile with Confluence
- Redefine your project management process with the Atlassian stack


Patrick Li

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Professional Expertise Distilled

JIRA Agile Essentials

Bring the power of Agile to Atlassian JIRA and run your projects efficiently with Scrum and Kanban
In this package, you will find:

- The author biography
- A preview chapter from the book, Chapter 1 'JIRA Agile Basics'
- A synopsis of the book’s content
- More information on JIRA Agile Essentials
About the Author

**Patrick Li** is a cofounder and senior engineer at AppFusions. AppFusions is an expert company that develops and packages integrated solutions for many enterprise applications and platforms, including IBM Connections, Jive, Atlassian, Google Apps, Box, Dropbox, and more.

He has worked in the Atlassian ecosystem for over 8 years, developing products and solutions for the Atlassian platform and providing expert consulting services. He is one of the top contributors to the Atlassian community, providing answers and advice on forums such as Atlassian Answers and Quora.

He has extensive experience in the design and deployment of Atlassian solutions from the ground up, and customizing existing deployments for clients across vertical markets, such as healthcare, software engineering, financial services, and government agencies.
Preface

JIRA Agile or agile software development is a new and revolutionary way of developing software. Many organizations have adopted agile over the traditional waterfall model, as it lets development teams produce software with better quality, higher customer satisfaction, and improved efficiency. JIRA Agile brings the power of agile to Atlassian JIRA; the most popular enterprise issue tracking and project management system. It builds on top of JIRA, allowing you to leverage many of its customization abilities including workflows and custom fields.

With JIRA Agile, you will be able to enjoy all the features that you love in JIRA and also use Agile to manage and run your projects with an all new interface, as well as switch between the two when required.

What this book covers

This book is organized into five chapters, starting with an overview of JIRA Agile, how it fits in with JIRA, and how to install JIRA Agile. We then move on to introducing the two main agile methodologies, Scrum and Kanban, and how to use JIRA Agile with them. In the last chapter, we will go beyond the basics and look at ways to further customize JIRA Agile to bring out more value from it.

With each chapter, you will learn important concepts including the agile methodologies themselves and how JIRA Agile lets you take advantage of what they offer.

Chapter 1, JIRA Agile Basics, serves as a starting point for the book and aims to guide you through installing and getting JIRA Agile up and running. This chapter will also be a gentle introduction, covering basic concepts and terminologies used in JIRA Agile, laying the foundation for subsequent chapters.
Chapter 2, *JIRA Agile for Scrum*, covers using JIRA Agile for the Scrum methodology. Starting with a high level overview of Scrum, it describes how JIRA Agile can be used to run projects with Scrum.

Chapter 3, *Customizing the Scrum Board*, extends on the previous chapter by introducing some of the additional customizations available for running Scrum projects with JIRA Agile. This chapter covers some of the key customization options including board column layout and swimlanes.

Chapter 4, *JIRA Agile for Kanban*, covers using JIRA Agile for the Kanban methodology. This chapter starts with an introduction of Kanban and how to use JIRA Agile to run Kanban-based projects.

Chapter 5, *JIRA Agile – Advanced*, covers some advanced uses of JIRA Agile, including additional customization options, and how to integrate JIRA Agile with Atlassian JIRA and Confluence. By integrating JIRA Agile with these two applications, teams can be more effective at creating contents and reporting on project progress. This chapter also covers using third party add-ons for JIRA Agile, to extend its capabilities.
JIRA Agile Basics

Agile software development has been gaining momentum over the years as more and more people start to see problems with the traditional model, and the benefits agile methodologies bring. In agile, development happens in iterative cycles and improvements are made in each iteration. Feedback is gathered as early as possible, improving customer engagement and team collaboration. All of these actions help development teams to better anticipate and manage changes.

Atlassian, the maker of popular issue tracking software JIRA, recognizes the values agile can bring. It has become a leader in agile software development by coming out with JIRA Agile, a product that adds agile support to JIRA. In this chapter, we will introduce the basics of JIRA Agile.

By the end of the chapter, you will have learned:

- What JIRA Agile is
- The different options to install JIRA Agile
- The key concepts and terminologies
- Creating new agile projects with project templates
Introducing JIRA Agile

JIRA Agile, formerly known as GreenHopper, is a JIRA add-on that enables agile capabilities in JIRA. This does not mean you need to choose between JIRA and JIRA Agile. As we will see later in this chapter, JIRA Agile simply takes the data stored in JIRA, transforms and presents it in a way that makes it easier for you to visualize, plan, and manage your issues with agile methodologies such as Scrum. JIRA Agile supports two agile methodologies:

- **Scrum**: This is an agile methodology where the development team works iteratively to complete the project. Each iteration or sprint has a defined timeframe and scope. Scrum is most suitable for software development projects. You can find out more about Scrum at http://en.wikipedia.org/wiki/Scrum_(software_development).

- **Kanban**: This is an agile methodology that emphasizes on just-in-time delivery by visualizing the workflow and tasks in progress. Kanban is most suitable for operation teams. You can find out more about Kanban at http://en.wikipedia.org/wiki/Kanban.

In short, the following list summarizes what JIRA Agile is and is not:

- JIRA Agile is an add-on for JIRA
- JIRA Agile is powered by new features and data stored in JIRA
- JIRA Agile is not a separate, standalone application
- JIRA Agile does not require you to be a seasoned JIRA user to use it
- As an end user, you can use JIRA Agile, almost independently, from JIRA if you choose to

Installing JIRA Agile

Before we can install JIRA Agile, we first need to make sure we have everything we need. Firstly, you will need to have an account on the my Atlassian website (http://my.atlassian.com). You should have an account when installing JIRA and the account should have your JIRA license. If you wish to try the product, you can sign up and create an account for an evaluation purpose.

The easiest way to get JIRA Agile is to install it directly from JIRA, via the Universal Plugin Manager (UPM). To do this, you will need to have an account with JIRA System Administrator global permission, and perform the following steps:

1. Click on the cog icon from the top right-hand corner of the screen and select the Add-ons option.
2. Type in **JIRA Agile** in the search box and hit the *Enter* key on your keyboard. This will search Atlassian Marketplace and automatically find the latest version of JIRA Agile that is compatible with your version of JIRA, this is shown in the following screenshot:

![JIRA Agile search result](image)

JIRA Agile adds Agile project management to any JIRA project. It's perfect for building and grooming a backlog, planning work, visualizing team activity and reporting team progress.

3. Click on the **Free trial** button for JIRA Agile in the search result list.

4. Review and accept the end user agreement from Atlassian Marketplace. Once you have accepted the agreement, JIRA will automatically download and install JIRA Agile for you.

5. Enter your Atlassian ID (your Mac account) when prompted and click on the **Log in** button, as shown in the following screenshot. This will automatically generate for you a 30 day trial license for JIRA Agile:
6. After the 30 day trial license has been generated and automatically applied, you will get a confirmation message similar to the following screenshot, indicating the version of JIRA Agile installed:

![Licensed and ready to go!]

7. Click on the Get started button to take you to the Getting Started with JIRA Agile page as shown in the following screenshot:
Manually installing JIRA Agile

As you can see, installing JIRA Agile is simple and straightforward. However, there might be times when you cannot use the Universal Plugin Manager (UPM). In these cases, you will need to manually download JIRA Agile from https://marketplace.atlassian.com/plugins/com.pyxis.greenhopper.jira onto your local computer first, then upload and install it via the UPM.

You might want to do a manual installation if you need to install a specific version of JIRA Agile due to version compatibility issues or other bugs with the latest release. Another reason would be if your JIRA does not have access to Atlassian Marketplace due to network or firewall settings. To manually install JIRA Agile:

1. Go to the preceding link and click on the Download link to get the add-on file.
2. Go back to JIRA and click on the cog icon in the top right-hand corner and select the Add-ons option.
3. Select the Manage add-ons option from the left-hand panel.
4. Click on the Upload add-on link:

![Upload add-on dialog](image)
5. Select the downloaded add-on file, and click on the **Upload** button.

6. After you have uploaded the add-on, you will need to generate an evaluation license. You can do this by either going to https://my.atlassian.com or the Marketplace page and clicking on the **Try it free** button.

**Understanding JIRA and JIRA Agile**

If you have used JIRA before, it is useful to understand how JIRA and JIRA Agile work together as a whole. Firstly, as we have mentioned earlier, JIRA Agile is an add-on for JIRA, so it leverages many of JIRA's features. It also introduces some new features and concepts.

**The agile board**

The agile board, or simply board, is a new user interface introduced in JIRA Agile. It is the main interface you, as the end user, will be using most of the time. If we use a real life comparison, the agile board will be your white board where you will place your user stories as post-it notes, which will be represented as cards. Essentially, you get the advantages of being able to visualize your backlog, as well as the added benefits of keeping track of changes and the progress of your tasks, along with reporting capabilities. For many teams, to keep using a white board is still very valuable, and we will look at ways we can combine both the white board and the JIRA Agile board in *Chapter 5, JIRA Agile – Advanced*.

In JIRA Agile, there are two different types of boards, one for Scrum and the other for Kanban, each with their own features. There is also a classic board, which is no longer under active development, so we will not be covering it. The following screenshot shows a sample Scrum board in the work mode:
Card

A card is like a post-it note you would have on your white board. It captures the user story and represents the requirement or feature that is to be implemented. In JIRA Agile, each card is an issue in JIRA. The following screenshot shows what a card looks like in JIRA Agile:
Issues and issue types
Every unit of work in JIRA Agile, such as a story or an epic, is an issue in JIRA. They are simply new issue types created by JIRA Agile when it is installed. The following new issue types will be added:

- **Epic**: This represents a big user story that has not been broken down into finer-grained requirements. In JIRA Agile, epics are usually used to define the "theme" for several stories that will be part of it, as well as modules or major components in a big development project.

- **Story**: This represents a single feature to be implemented. It is usually used to capture requirements from the end user's perspective. For this reason, stories are often written in non-technical language while focusing on the desired results of the feature.

- **Technical task**: This is a subtask issue type that represents the actual technical work that needs to be done in order to implement the story.

Filters and JQL
JIRA Agile is able to work on either one specific project, or multiple projects at once. When you want to have multiple projects, you will need to use filters to define what issues will be included. For this reason, understanding and being able to use JIRA Query Language (JQL) effectively can be very handy. You can find more information on JQL at https://confluence.atlassian.com/display/JIRA/Advanced+Searching.

Workflows
Workflow is the heart of JIRA and is what powers JIRA Agile in the background. As we will see in later chapters, JIRA Agile is able to integrate with your existing workflows, or adapt to and model after your development process. When you are just getting started, you don't have to know much about workflow as JIRA Agile will take care of it for you.

Using JIRA Agile project templates
To help you get started quickly, JIRA Agile comes with two new project templates, one for Scrum and one for Kanban. If you are familiar with JIRA, project templates let you create new projects based on pre-defined templates. So, when the project is created, it will have all the necessary configurations set for you, including:
**Issue type scheme**: An issue type scheme that contains only agile-related issue types, such as story and epic.

**Workflow**: A specially designed workflow to work with JIRA Agile that lets you easily move tasks on your board.

**Screens**: A set of screens that contain necessary fields for working with agile, such as epic link to link stories to epics, and sprint for when tasks are added to Scrum sprints.

**Agile board**: An agile board that is dedicated to the new project.

The agile board is a handy tool if you want to create a new agile project and get running straight away. To use these new templates, perform the following steps:

1. Select the **Create Project** option from the **Projects** drop-down menu.
2. From the **Select Project Type** dialog, select either the **Agile Scrum** or **Agile Kanban** template and click on the **Next** button:

   ![Select Project Type](image)

3. Enter your project's name and description, and click on the **Submit** button to create the new project.

   The Agile Scrum and Agile Kanban templates are present when you first install JIRA, but they are only usable after JIRA Agile is installed.

As we will see in later chapters, to use JIRA Agile, you do not have to use these templates. You can enable JIRA Agile and create agile boards for any existing projects. These templates are simply tools to help you get started quickly.
Summary

In this chapter, we looked at some of the basics of JIRA Agile, what it is, and what it is not. JIRA Agile is an add-on that lets you visualize your issues in a different way, and by leveraging many of the core features of JIRA, it keeps the learning curve low, especially for seasoned JIRA users.

Now that we have laid out the basics of JIRA Agile, we will start to explore how we can use it to run agile projects, starting with the Scrum methodology in the next chapter.
Where to buy this book

You can buy JIRA Agile Essentials from the Packt Publishing website.

Alternatively, you can buy the book from Amazon, BN.com, Computer Manuals and most internet book retailers.

Click here for ordering and shipping details.