



Jira Align: Jira Integration Best Practices and FAQs

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Connectors

Jira Integration Best Practices

Jira Integration Best Practices and FAQs Overview

With Jira Align, you can scale agile to the enterprise. Everyone from engineers to executives can use Jira Align to optimize software delivery.

Jira Align integrates with a number of third-party tools, such as Jira. The Jira Integration Best Practices and FAQs Guide provides information on using Jira for Agile development teams as well as integrating Jira to Jira Align. The guide is intended primarily for Jira system administrators.

Jira Integration Best Practices and FAQs: Teams and Sprints

Jira does not natively have the concept of a “Team”. The closest object in Jira that mimics a team is a rapid board in Jira Agile. Whether a team is using Scrum or Lean/Kanban, Agile best practices call for that team to have their own, single, backlog and tracking board, so that the team is able to focus on their own work and track individual team metrics, such as Velocity or Cycle Time.

Given these conventions, Jira Align considers a rapid board in Jira to equal an agile team, and the Jira Align/Jira integration will create one team in Jira Align per board that is configured.

Best practice: One rapid board = one agile team

Create one rapid board per team, whether a Scrum or Kanban board. Have each team work solely on the one team board. Use Jira Align to obtain roll up views and metrics. See the FAQs for more information on specific cases.

Best practice: Issues should show up on one rapid board only

Issues (stories, bugs, etc.) in Jira should only show up on one Team rapid board at a time. This is accomplished via the board filter. You may still have other boards in Jira that you have used in the past for rollup views that show the same issues – these will not be integrated. See the FAQs for more information.

Best practice: One active sprint per rapid board

Have one sprint active at a time for Scrum Boards. It is fine to have future sprints not activated that are used for future planning. Multiple concurrent sprints are not part of Scrum methodology and are not supported in the integration. See the FAQs for more information.

FAQs

Q: What if I have multiple teams using the same rapid board?

A: It is usual for team leads who are responsible for many teams to set up a single rapid board and have all their teams use that one board. Typically, this is done so the lead can look across all teams at once. Doing this, however, confuses the internal Jira metrics, as the teams cannot track their own Velocity or Cycle Time or identify their own backlog ahead of sprint planning without bending Jira constructs to different purposes than intended. As Jira Align is inherently a platform intended to help leaders of all kinds aggregate data and metrics across multiple teams, using such a setup in Jira becomes unnecessary for the team lead once Jira Align is deployed and integrated to Jira.

If you want to continue using one rapid board for multiple teams, and you adhere to a naming convention for your sprints that includes the team name, then separate boards can be set up just for the integration to use that filter on the name of the team in each sprint. For instance, if you have “Zeus Sprint 1” and “Athena Sprint 1” on the same board, create a board called “Zeus Integration Board”, and have the filter for the board use “sprint = Zeus” as part of the filter – do the same for the Athena board. This will be the board Jira Align is integrated to and the team members need not change the way they work or even know about the existence of the board.

If you do not use the convention above, then that multi-team rapid board will become just one team in Jira Align. As in Jira, you will not be able to track individual team metrics like Velocity, and will only get an aggregate metric for the entire group of teams. The bigger issue comes into play if you use multiple active, concurrent sprints on the same rapid board. Jira Align does not allow sprints for a single team to overlap, as that would be a bad Scrum practice and violate the purpose of sprinting. The work around would be to map all the active sprints from Jira to just one sprint in Jira Align. This would require manual intervention every time new sprints are activated and is not ideal. To change sprint mappings, go to Team > Manage > Sprints, and then select the Manage Jira Sprints option from the More Actions menu at the top-right of the page.

Q: What happens if I have teams using multiple boards for different types of work in Jira?

A: Sometimes product owners or other stakeholders prefer to keep “their” backlog and active work on their own board, and teams have to jump from board to board to do work in the different work streams. This is against agile team best practices, as there is no one view of all work for that team.

If you continue to use multiple boards for one team, each board will become its own team in Jira Align. You will not be able to get consolidated metrics for any individual team that is working across multiple boards. Each of these teams created will get their own set of sprints which will map to the sprints on each of those boards. In Jira, however, it is possible to physically share the same sprint object across multiple boards. If this is what you do, then all work in that sprint will show up in just one of the sprints for one of the teams that got created in Jira Align, further throwing off metrics and confusing object mapping.

Q: What happens if I have my team boards set up so that a single issue (story, bug, etc.) can show up on more than one board?

A: Typically, in Jira you assign issues to a team via a custom field (“Team”, for example) or you have each team’s work within their own Jira project, so they own all issues in that project. When an issue is first created, it may not yet be assigned to a team, so the “Team” field would be left empty or the issue would have some other identifier that can be filtered on to indicate it is not assigned to a team yet. If these conventions are not used, and an issue shows up on more than one team board, then the Jira/Jira Align integration cannot determine which team owns that issue and the team will remain unassigned. Once that issue is assigned to a sprint, Jira Align will assign it to the team that owns that sprint. Should the issue be assigned to multiple different team sprints at the same time, the integration has no choice but to pick just one sprint, as a story in Jira Align naturally belongs to just one sprint at a time. Jira Align will pick the sprint with the latest dates in this case.

Q: I have created my own “roll-up” boards in Jira to try and see cross-team progress or else to perform backlog grooming. What do I do with these boards?

A: “Roll-up” or backlog grooming boards should not be integrated. They do not represent a single agile team and will cause many of the difficulties mentioned above. You can keep your roll-up boards in Jira, but you will also find that Jira Align provides the type of roll-up views and backlog grooming facilities being mimicked by these boards.

Q: Some boards use future sprints as buckets for categorizing work. Examples: A sprint named “To Delete” or a sprint named “Grooming”. What happens to these “fake” sprints?

A: As these are sprint objects just like any other in Jira, the integration will create these as sprints within Jira Align, likely with unusual dates as the bucket sprints tend to be older than the current sprint. Do not create “fake” sprints in Jira. Instead, use labels or custom fields to filter for issues that you categorize in this manner

Q: I have a team that uses one board, but we have two sprints running at the same time (concurrent dates) to indicate different work streams. What will happen in the integration?

A: You would have to manually map both sprints to the same single Jira Align sprint every sprint cycle. This is the same issue as mentioned in What if I have multiple teams using the same rapid board? It is best to have ONE active sprint per board. Use labels or custom fields to filter the issues for the Jira views.

Q: What do I do if the future dates of Jira sprints are misaligned on the Jira Align Sprint Board under Jira Management > Jira Sprints?

A:

1. Jira does not assign date ranges to future sprints without interference from an add-on. The Jira Align connector predicts the future sprint dates based on PI anchor dates and existing Jira Align sprints. The Jira connector will align future Jira sprints based on their sequential order on their respective Jira board and the sequential order of Jira Align PI anchor dates. Common reasons for future Jira sprints to be misaligned include the creation and later deletion of a bucket sprint for planning in Jira and improperly managed PI long sprints in support of a Kanban cadence. If your future sprints are misaligned, it will most likely look something like this.

The screenshot shows the 'Jira Sprints' management interface. A table lists various sprints with columns for JIRA Sprint, Board Conflicts, Start, End, Status, Recommended Sprint, and Override / Actual Sprint. A red box highlights the 'Sample Sprint 4' row, which shows a date conflict between the 'Start' and 'End' dates (7/22/2018 and 7/13/2018) and the 'Recommended Sprint' (AC Support-JIRA Team - Sample Sprint 4) and 'Override / Actual Sprint' (AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 4 (07/02/18 - 07/13/18)).

JIRA Sprint	Board Conflicts	Start	End	Status	Recommended Sprint	Override / Actual Sprint	Select
1 Sample Sprint 2		5/30/2018	6/13/2018	closed	AC Support-JIRA Team - Sample Sprint 2	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 2 (05/20/18 - 06/13/18)	<input type="checkbox"/>
2 Sample Sprint 1		5/16/2018	5/30/2018	closed	AC Support-JIRA Team - Sample Sprint 1	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 1 (05/16/18 - 05/30/18)	<input type="checkbox"/>
10 Sample Sprint 3		6/14/2018	6/25/2018	closed	AC Support-JIRA Team - Sample Sprint 3	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 3 (06/14/18 - 06/25/18)	<input type="checkbox"/>
11 Sample Sprint 4		7/22/2018	7/13/2018	closed	AC Support-JIRA Team - Sample Sprint 4	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 4 (07/02/18 - 07/13/18)	<input type="checkbox"/>
28 Sample Sprint 5		7/16/2018	7/27/2018	active	AC Support-JIRA Team - Sample Sprint 6	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 6 (07/15/18 - 07/26/18)	<input type="checkbox"/>
48 Sample Sprint 6		7/22/2018	7/13/2018	future	AC Support-JIRA Team - Sample Sprint 4	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 6 (07/15/18 - 07/26/18)	<input type="checkbox"/>
44 Sample Sprint 7		7/16/2018	7/27/2018	future	AC Support-JIRA Team - Sample Sprint 6	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 7 (07/16/18 - 07/27/18)	<input type="checkbox"/>
45 Sample Sprint 8		7/30/2018	8/19/2018	future	AC Support-JIRA Team - Sample Sprint 6	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 8 (07/30/18 - 08/10/18)	<input type="checkbox"/>
46 Sample Sprint 9		8/13/2018	8/24/2018	future	AC Support-JIRA Team - Sample Sprint 9	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 9 (08/13/18 - 08/24/18)	<input type="checkbox"/>
47 Sample Sprint 10		8/27/2018	9/7/2018	future	AC Support-JIRA Team - Sample Sprint 10	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 10 (08/27/18 - 09/07/18)	<input type="checkbox"/>

- Once you recognize that future Jira sprints are misaligned on the Jira Align sprint board, you should proceed to the PI Sync Sprints tab. Go to Program > Manage > Program Increments > select the PI corresponding to the Program the Jira Board is mapped to > Sync Sprints tab. You should verify your active Jira sprint is on the same cadence as the Jira Align anchor sprints plus or minus the assigned buffer days under Jira Settings > Jira Setup.

The screenshot displays the Jira Align interface. On the left, a sidebar contains navigation icons. The main content area is titled 'Program Increments' and shows a list of items with columns for ID and Title. The items listed are:

ID	Title
264	VV JIRA RELEASE
263	AgileCraft JIRA
190	SAMD101
166	OK JIRA PI
162	Tulip
79	DV JIRA NEW PI
76	VV JIRA RELEASE 2 (secondary)
71	New JIRA Release

At the bottom of this list, it indicates '1 of 8 Records'.

On the right side, a configuration panel for 'Program Increment 263 AgileCraft JIRA' is visible. It includes settings for 'Daily Max' (6), 'Daily Defect' (3), and 'Total Anchors' (1). Below these settings is a 'Create Sprints' button. Underneath, the 'Current Sprints' section shows a grid of sprints with columns for 'Anchor Sprints', 'Short', and 'Standard Sprint Dates'.

Anchor Sprints	Short	Standard Sprint Dates
1/5/21-6/1	AS1 S	5/16/2018 5/30/2018
2/6/4-6/15	AS2 S	5/30/2018 6/13/2018
3/6/18-6/29	AS3 S	6/13/2018 6/23/2018
4/4/9-4/20	AS4 S	6/25/2018 7/2/2018
5/7/2-7/13	AS5 S	7/2/2018 7/13/2018
6/7/16-7/27	AS6 S	7/16/2018 7/27/2018
7/7/20-8/10	AS7 S	7/30/2018 8/10/2018
8/8/13-8/24	AS8 S	8/13/2018 8/24/2018
9/8/27-9/7	AS9 S	8/27/2018 9/7/2018
10/9/10-9/21	AS10 S	9/10/2018 9/21/2018
11/9/24-10/5	AS11 S	9/24/2018 10/5/2018

At the bottom of the configuration panel, there is a 'Save' button and a toggle for 'Update Sprints with dates'.

- After verifying your Jira board is on the same cadence as the Jira Align PI, you should check the sprint grid for any sprints sharing an anchor date with another sprint or sprints that are past their completion date, but still open. Move any sprints past their completion date that are still open to the Completed status. If you have the toggle under Jira Settings > Jira Setup > Create Sprints in Jira Align from Jira set to Yes, you should ensure there is only one team sprint for each PI anchor sprint by deleting any duplicate sprints. If you have the toggle under Jira Settings > Jira Setup > Create Sprints in Jira Align from Jira set to No, you should make sure there is an Jira Align team sprint created for each anchor sprint and delete any duplicates.

Sprint List

Apply Filters Columns Shown More Actions Add Sprint

Search

ID	Sprint Name	State	Program Increment	Owner	Schedule	Start Date	Stores	Sync Date	Select
2687	AC Support-JIRA Team - Sample Sprint 10	PLANNING PHASE	AgileCraft JIRA		10 Week Days	9/24/2018	0	11/8/24-10/5) (9/24 - 10/5)	
2686	AC Support-JIRA Team - Sample Sprint 9	PLANNING PHASE	AgileCraft JIRA		10 Week Days	9/19/2018	0	10/9/10-9/21) (9/19 - 9/21)	
2685	AC Support-JIRA Team - Sample Sprint 8	PLANNING PHASE	AgileCraft JIRA		10 Week Days	8/27/2018	1	9/8/27-9/7) (8/27 - 9/7)	
2684	AC Support-JIRA Team - Sample Sprint 7	PLANNING PHASE	AgileCraft JIRA		10 Week Days	8/13/2018	3	8/8/13-8/24) (8/13 - 8/24)	
2683	AC Support-JIRA Team - Sample Sprint 6	PLANNING PHASE	AgileCraft JIRA		10 Week Days	7/16/2018	0	6/7/16-7/27) (7/16 - 7/27)	
2681	AC Support-JIRA Team - Sample Sprint 5	IN DEVELOPMENT	AgileCraft JIRA		10 Week Days	7/15/2018	6	6/7/16-7/27) (7/16 - 7/27)	L
2355	AC Support-JIRA Team - Sample Sprint 4	COMPLETED	AgileCraft JIRA		10 Week Days	7/2/2018	2	5/7/2-7/13) (7/2 - 7/13)	L
2340	AC Support-JIRA Team - Sample Sprint 3	COMPLETED	AgileCraft JIRA		10 Week Days	6/14/2018	0	3/6/15-6/29) (6/13 - 6/22)	L
2279	AC Support-JIRA Team - Sample Sprint 2	COMPLETED	AgileCraft JIRA		10 Week Days	5/30/2018	0	2/8/4-6/15) (5/30 - 6/13)	L
2278	AC Support JIRA Team - Sample Sprint 1	PLANNING PHASE	AgileCraft JIRA		10 Week Days	5/16/2018	2	1/5/21-6/1) (5/16 - 5/30)	L

1 of 15 Results 1 of 1 First Previous Next Last

Help

4. After cleaning up the sprint grid, you should return to the Jira Align sprint board, and then click Resync Future Sprints, which will null Jira Align's predicted sprint dates for the Jira future sprints and repopulate the dates based on the PI anchor sprints and existing Jira Align sprints. If Create Sprints in Jira Align from Jira is set to Yes, the connector will create new team sprints based on the PI anchor sprints if necessary. If Create Sprints in Jira Align from Jira is set to No, the connector will only map to existing team sprints.

CONNECTORS

- GitHub Settings
- JIRA Settings
- JIRA Management**
- Rally Settings
- Rational Settings
- ServiceNow Settings
- Stack Settings
- TFS/VSTS Settings
- VersionOne Settings
- Pivotal Settings

LOGS

- Changes
- Use Trend

SETTINGS

- Announcement
- Email
- Platform
- Platform Terminology
- Report Baseline
- Time Tracking
- User Record Terminology
- Workday

JIRA Boards JIRA Sprints JIRA Deleted Issues

View Details Fit View View Logs Auto-Sync AgileCraft Sprint Remove Save Resync Future Sprints Sync Board Now Board Sync (AS board) : Start Time 7/15/2018 10:46:36 PM

JIRA Sprint	Board Conflicts	Start	End	Status	Recommended Sprint	Override / Actual Sprint
1 Sample Sprint 2		5/30/2018	6/13/2018	closed	AC Support-JIRA Team - Sample Sprint 2	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 2 (05/30/18 - 06/13/18)
2 Sample Sprint 1		5/16/2018	5/30/2018	closed	AC Support-JIRA Team - Sample Sprint 1	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 1 (05/16/18 - 05/30/18)
10 Sample Sprint 3		6/14/2018	6/25/2018	closed	AC Support-JIRA Team - Sample Sprint 3	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 3 (06/14/18 - 06/25/18)
11 Sample Sprint 4		7/2/2018	7/13/2018	closed	AC Support-JIRA Team - Sample Sprint 4	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 4 (07/02/18 - 07/13/18)
28 Sample Sprint 5		7/16/2018	7/27/2018	active	AC Support-JIRA Team - Sample Sprint 5	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 5 (07/15/18 - 07/26/18)
48 Sample Sprint 6				future		Select One
44 Sample Sprint 7				future		Select One
45 Sample Sprint 8				future		Select One
46 Sample Sprint 9				future		Select One
47 Sample Sprint 10				future		Select One

- The Board Sync Start Time will reappear in the upper right corner of the board, notifying you that the resync is completed. This process can take 10 to 30 minutes depending on the size of the board. If Synchronize sprint names from Jira to Jira Align is set to Yes, the names will resync over upon the next automated board sync, which is set under Jira Settings > Jira Setup > Timer on Jira Boards.

The screenshot shows the Jira Align interface with a notification box in the top right corner that reads "Board Sync (AS board) : Start Time 7/15/2018 10:53:15 PM". Below the notification is a table of sprints with columns for JIRA Sprint, Board Conflicts, Start, End, Status, Recommended Sprint, Override / Actual Sprint, and Select.

JIRA Sprint	Board Conflicts	Start	End	Status	Recommended Sprint	Override / Actual Sprint	Select
1 Sample Sprint 2		5/30/2018	6/13/2018	closed	AC Support-JIRA Team - Sample Sprint 2	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 2 (05/30/18 - 06/13/18)	<input type="checkbox"/>
2 Sample Sprint 1		5/16/2018	5/30/2018	closed	AC Support-JIRA Team - Sample Sprint 1	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 1 (05/16/18 - 05/30/18)	<input type="checkbox"/>
10 Sample Sprint 3		6/14/2018	6/25/2018	closed	AC Support-JIRA Team - Sample Sprint 3	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 3 (06/14/18 - 06/25/18)	<input type="checkbox"/>
11 Sample Sprint 4		7/2/2018	7/13/2018	closed	AC Support-JIRA Team - Sample Sprint 4	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 4 (07/02/18 - 07/13/18)	<input type="checkbox"/>
28 Sample Sprint 5		7/16/2018	7/27/2018	active	AC Support-JIRA Team - Sample Sprint 5	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 5 (07/15/18 - 07/26/18)	<input type="checkbox"/>
48 Sample Sprint 6		7/30/2018	8/19/2018	future	AC Support-JIRA Team - Sample Sprint 6	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 6 (07/30/18 - 08/19/18)	<input type="checkbox"/>
44 Sample Sprint 7		8/13/2018	8/24/2018	future	AC Support-JIRA Team - Sample Sprint 7	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 7 (08/13/18 - 08/24/18)	<input type="checkbox"/>
45 Sample Sprint 8		8/27/2018	9/7/2018	future	AC Support-JIRA Team - Sample Sprint 8	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 8 (08/27/18 - 09/07/18)	<input type="checkbox"/>
46 Sample Sprint 9		9/10/2018	9/21/2018	future	AC Support-JIRA Team - Sample Sprint 9	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 9 (09/10/18 - 09/21/18)	<input type="checkbox"/>
47 Sample Sprint 10		9/24/2018	10/5/2018	future	AC Support-JIRA Team - Sample Sprint 10	AgileCraft JIRA: AC Support-JIRA Team - Sample Sprint 10 (09/24/18 - 10/05/18)	<input type="checkbox"/>

Jira Integration Best Practices and FAQs: Issue, Story, and Epic Management

Jira only has a two level backlog hierarchy: Epic -> Story, whereas Jira Align enables at minimum a five-level hierarchy: Strategy -> Theme -> Epic -> Feature -> Story. Capability can also be introduced between Epic and Feature for six levels: Strategy -> Theme -> Epic -> Capability -> Feature -> Story.

Between Jira and Jira Align, an “Epic” in Jira becomes a “Feature” in Jira Align, as it is the natural parent of a Story, a “Story” becomes a “Story”, a “Bug” becomes a “Defect”, and a “Sub-Task” becomes a “Task” under a Story. Any other custom issue types can be configured to integrate, and those will become a “Story” in Jira Align, with a Type field indicating the origin type configured from Jira.

Best practice: Use “Epics” in Jira as you would “Features”

A feature should be a concise unit of value that can be delivered within a single program increment. Any objects in Jira that you use to represent true “Epics” (which are allowed to span a PI), whether they be Jira Epics or another object, should be migrated to be Epics within Jira Align. The feature level should be represented by Jira “Epics”, with stories directly underneath them. True epics have no representation in Jira. The connection between epics and features will be made within Jira Align.

Best practice: Ensure stories in Jira are tied to a parent Jira Epic

Stories not tied to a parent (epic in Jira or feature in Jira Align) are considered “orphaned” stories. The value from these stories cannot be rolled up to any higher level initiative to promote organizational visibility. In Jira Align, you can use Program > Backlog (select PI at the top left, and then click Orphan Objects at the top right), to see your orphaned stories and assign them to a parent feature.

Best practice: Ensure stories in Jira have a story point estimate

Without an estimate, it is impossible to forecast completion for a backlog. Estimates are also what drive the velocity number for a team per sprint. Each portfolio in Jira Align can be configured to estimate stories in one of two ways: Modified Fibonacci or Power of Two. Ensure your stories use the correct estimation system for your portfolio and that the majority are estimated. At the least, there should be no unestimated stories assigned to an active sprint. In Jira Align, you can use Program > Backlog (select PI at the top left, and then click Orphan Objects at the top right), to see your unestimated stories.

Best practice: Finish story within a sprint, otherwise, move or split it before closing the sprint

Within Jira, if an issue (story, etc.) is unfinished when you close the sprint, Jira will tell you it is moving the story to the backlog. Unfortunately, that story will forever be tagged with the sprint where it was not finished if you do it this way. Let's say another team picks up the story in their sprint. Now it looks like that story belongs to two sprints, and in fact the Jira reports for the original team will now include the new team's sprint in the filter dropdown menu. When this occurs, you also have to tell Jira Align which sprints belong to which teams, by going to Team > Manage > Sprints, and then selecting the Manage Jira Sprints option from the More Actions menu at the top-right of the page. You will need to remove wrong sprints from teams where they do not belong.

To avoid this whole issue in both Jira and Jira Align, remove the stories from the sprint BEFORE closing the sprint. This will accurately report in Jira that you had a scope change for the sprint, and it will not forever tag that story with the sprint it was not completed in. Another work around is to split the story within Jira Align, allowing part of the story to be properly closed out in one sprint, and the remainder to go to the backlog or any future sprint.

FAQs

Q: What if I use Jira Components, the Structures Plugin, or some other way to mimic a three- or four-tier hierarchy in Jira?

A: The Jira Align/Jira integration does not support Components or third party plugins. Plan to use Jira Align for all layers above the feature, which is represented natively in Jira as a Jira Epic. You will need a migration plan for importing your higher level layers into Jira Align, which can easily be done via Portfolio > Epics > More Actions > Import Epics or Solutions > Capabilities > More Actions > Import Capabilities (if using capabilities).

Q: What if my team does not do any story estimation?

A: If your team does not estimate stories, then Agile common sense would indicate that all your stories are approximately the same amount of work (“sized” the same). If that is the case, the best thing is to estimate all stories with the same value (1 or 2, for example). That way the velocity can still be calculated (by both Jira and Jira Align) and will reflect the number of stories completed. If the stories are NOT all of similar size, then not estimating them means you will not be able to calculate a velocity, you cannot make trade-offs between larger and smaller stories, you cannot do any forecasting, and a host of other anti-patterns. In this case, your teams should begin to estimate your stories ahead of putting them into sprints, at a minimum, according to Agile best practices.

Q: What if my team makes heavy use of custom issue types?

A: Any custom issue types can easily be configured to integrate to Jira Align. These issues will be represented in Jira Align as stories, and you can preserve the original issue type name in the field called Type on the story.

Q: What if I map the same Jira field (Story Points) to two unique Jira Align fields (LOE for stories and Points for features)?

A: A custom field is created or exists by default in Jira. This field is added to the **Story Points** field ID mapping in Jira Align under **Administration > Jira Settings > Jira Setup**. You need to turn on the **Enable Feature Point Sync** and **Enable Story Point Sync** options on the **Jira Setup** page. In Jira, you need to make the **Story Points** field show up on the Jira story and epic pages.

The story's **LOE** field in Jira Align syncs with the **Story Points** field in Jira. The feature's **Points** field in Jira Align would sync with the **Story Points** field on the Jira epic.

Note that Jira Align features (Jira epics) have story points in Jira Align that is a rollup of children stories LOE. Jira Align does not sync this field with Jira epics; it syncs the feature's **Points** field which is a separate estimate.

Q: How do I prioritize Jira epics and stories?

A: To enable rank synchronization between Jira Align and Jira, a custom field ID for rank must be set in the **Rank** text field on the **Jira Settings** page within Jira Align **Administration**. In the field, enter the default Jira rank field's ID. The setting **Enable Rank Sync** on the same page must also be set to **Yes**.

Rank synchronization is performed automatically; ranking must be either pushed to or pulled from Jira Align on demand. To do this, navigate to the feature or story backlog, ensure a program is selected in the Configuration bar, and set the program increment to **None**. Ranking requires setting the PI to **None** as PIs don't exist in Jira. Then, select **Pull Rank** and choose to either push or pull the rank from the external system.

Once a push or pull request has been made, a job order to the external system is created and the rank synchronizes after the job finishes. After the job order is sent, the options for push and pull rank are not selectable until the job completes.

If **Push rank to the External System** has been selected, the rank of all items in the selected Jira backlog updates according to the ranks of their corresponding Jira Align issues. If **Pull rank from the External System** has been selected, the Jira Align backlog rank updates according to the ranks of their corresponding Jira issues.

Note that only items that are visible on the Jira Align backlog when push or pull rank is performed will be updated.

Q: Why are issues in Jira sometimes updated with the connector ID and sometimes by an actual user?

A: The updates made via the service account were made in Jira Align. Updates made by a specific user were made in Jira. In Jira Align, the service account will use Jira user information when available due to matching external ID or emails between Jira Align accounts and Jira accounts. Updates made to Jira are made by the service account via the API so they will have the service account's name. If you need to verify who made the update, you can typically check the Jira Align audit log.



Jira Integration Best Practices and FAQs: Adding a PI Field in Jira

Jira Align has the ability to push PI data to a custom field in Jira. Whether you already have this custom field in place or are creating it for the first time, please be aware of the following best practices:

1. This is a one-way push from Jira Align to Jira--only Jira Align can push PI data as PI is not a field native in Jira. Jira Align is the system of record for the PI upon integration. This custom field should be of type Text Field (single line).
 2. For all integrated projects, the PI field must be read-only to the API users. To accomplish this, the admin must make the field available on the Create and View screen, but not on the Edit screen. Jira integration requires a separate Create and Edit screen (one each, not shared) to be in place for all integrated projects. The API will update integrated projects, even if not listed on the Edit screen.
 3. The Acceptance Criteria field for stories and features (Jira epic) should not be the same custom field. If it is the same custom field, Product Managers lose the ability to accept, reject, or constrain a single unique acceptance criteria on features. For stories, it is important to have acceptance criteria available for teams to use; clearly defined acceptance criteria help to avoid surprises at the end of a sprint and ensures a higher level of customer satisfaction.
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Jira Integration Best Practices and FAQs: Commonly Utilized Jira Query Language (JQL)

A very useful tool used to search for Jira issues is JQL, which stands for Jira Query Language. Jira users can use JQL to create database queries to provide faster access to information in Jira. If you have a technical background and are familiar with SQL, then you have a head start because Atlassian's implementation of JQL is similar. To learn more about JQL and how to use it with Jira, please consult Atlassian's Jira documentation:

- [Search Jira like a Boss with JQL](#)
- [JQL: The Most Flexible Way to Search Jira](#)

JQL functions the same way in Jira Align as it does with a Jira Advanced Search--it allows you to create custom queries that search for data in Jira. When a JQL query is used in Jira Align, it returns data directly from Jira and performs a one-way sync to Jira Align (i.e., data is pulled from Jira into Jira Align, but not pushed from Jira Align into Jira). For example, you can use a JQL query to search for a specific sprint in Jira, and have the found sprint added to Jira Align's backlog and/or Sprint grid.

The primary use case for JQL queries is to search for legacy data in Jira and have it pulled into Jira Align. For example, let's suppose Jira was integrated with Jira Align via the connector on a specific date, such as 01/01/18. In this case, Jira and Jira Align data has been syncing since the integration date, but what if you wanted to sync data that was created before the integration date, for example from the year 2017? You would need to create a JQL query that searches for your target data in Jira and syncs it with Jira Align.

Best Practice:

We recommend that you build the query statement first in Jira using a Jira Advanced Search, and test it to make sure it returns the target data. Query strings are easier to build directly in Jira, as Jira will suggest operators and spaces to use in the string. Once tested, the string can be cut and pasted into the Jira Integration page of Jira Align to conduct a search.

Follow these steps to search for and sync legacy Jira data with Jira Align:

1. Make sure you have performed all of the prerequisites and followed instructions for Jira Setup, so that sprints and other work items are correctly mapped from Jira to Jira Align.
2. In the Nav menu, select Administration. Under the Connectors section of the menu, select Jira Settings; the Jira Integration Settings page displays.
3. Click the Jira Integration tab.
4. In the Jira Search Query field, type or paste your JQL string. For example, to find sprint 35 in the project named ST, your string would be (project = 'ST' and sprint = 135).

***Note:** When using a target date range in your query, you must use one of the following supported date formats: 'yyyy/MM/dd HH:mm', 'yyyy-MM-dd HH:mm', 'yyyy/MM/dd', 'yyyy-MM-dd'. You may also use a period format, e.g., '-5d', '4w 2d'.*

5. In the lower-left of the panel is a drop-down list with Yes/No options for Run Board, Sprint and Fix Version sync along with the search query; select Yes to run a full sync concurrently with the search, and No if you do not want to run a full sync (if your connector sync interval runs every few minutes, there is probably no need to run a full sync at the time of search).
6. Click the Run button in the lower-right of the panel.
7. Refresh the page after several minutes until you get a notification to the left of the Run button that indicates the run is complete, for example, Last Run: 11/21/2018 10:30:02 AM .
8. Verify that your target data has been successfully pulled into Jira Align. For example, if you searched for project = 'ST' and sprint = 135 as depicted in the example in Step 4, make sure sprint 135 from the project ST is available in the Sprint grid of Jira Align's Sprints page.