

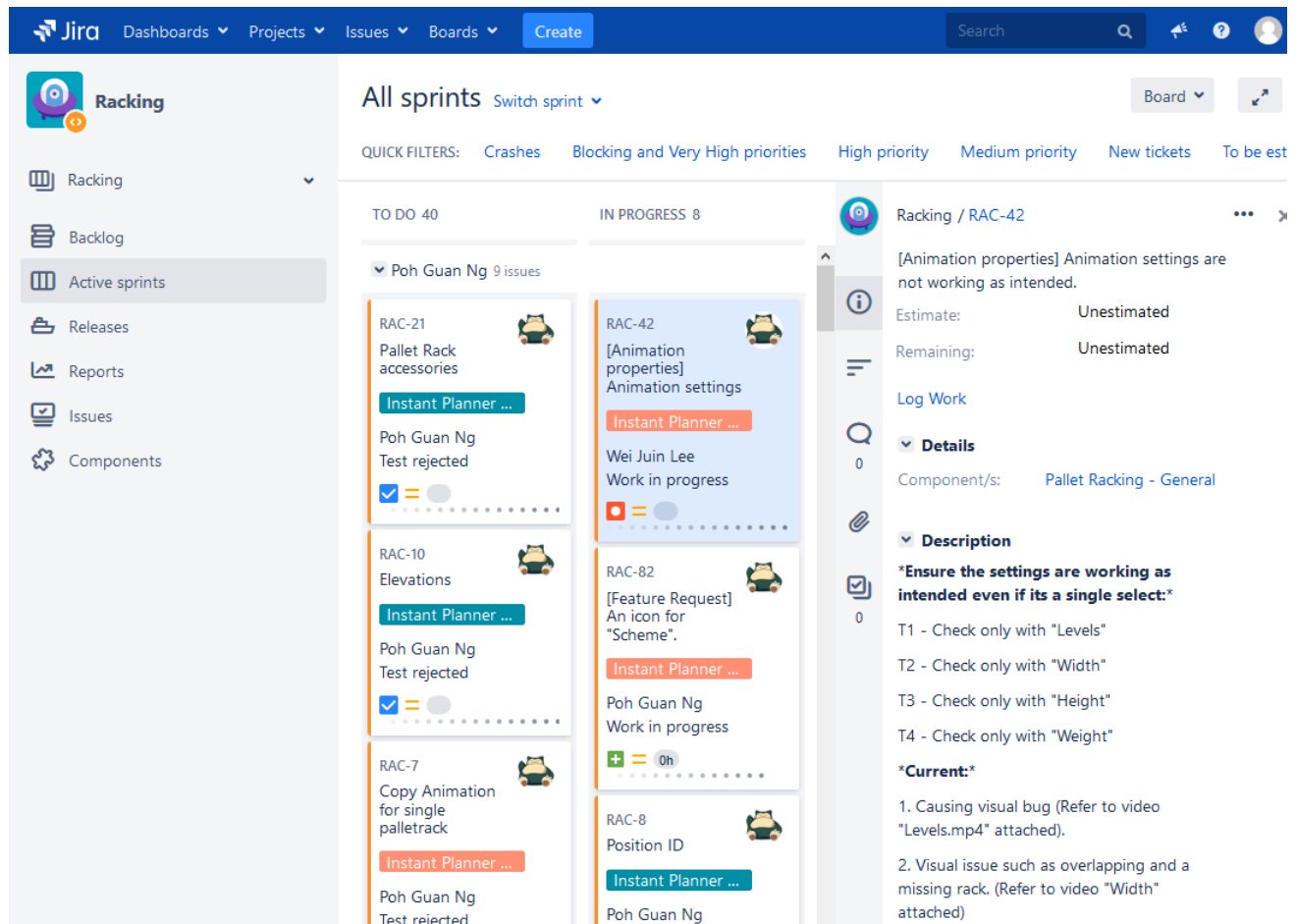
# GUIDELINES FOR **JIRA BOARDS**

## Setting up and Configuring Boards in Jira

All Jira projects are initially set up by Configura. Multiple scrum teams can work on the same project.

A project can consist of one or several **Boards**, that are of either Kanban or Scrum type as described below. A board can access one or multiple projects.

Here is an example of how a Scrum board could look:



## Scrum vs Kanban

### Scrum

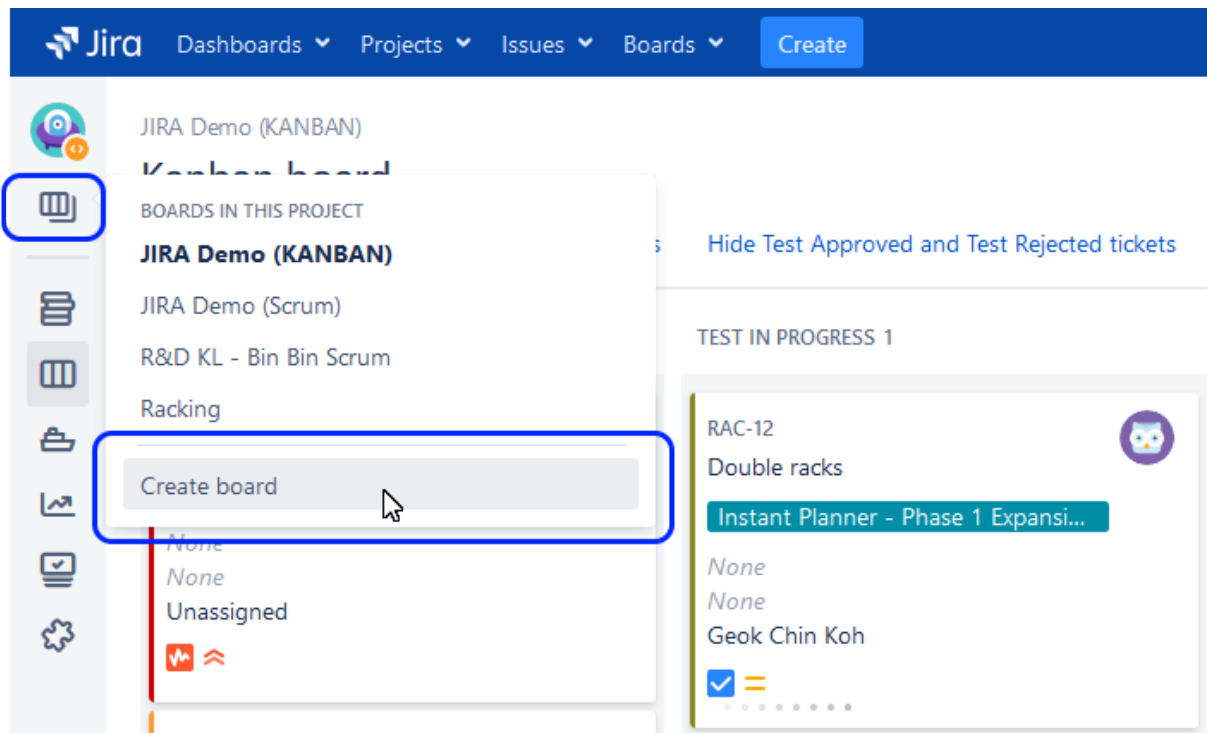
- Create sprint backlogs
- Add tasks to sprints
- More iterative

### Kanban

- Work directly from master backlog
- Pull next highest priority from the master backlog
- Less iterative

## Creating a New Board

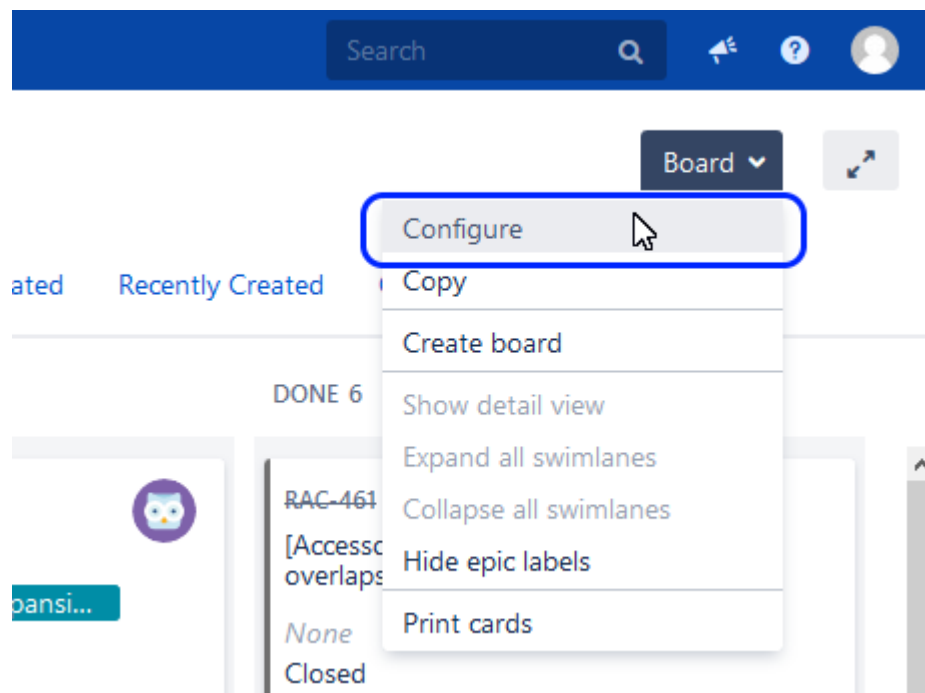
1. Place the mouse over this symbol in the sidebar and select **Create board**:



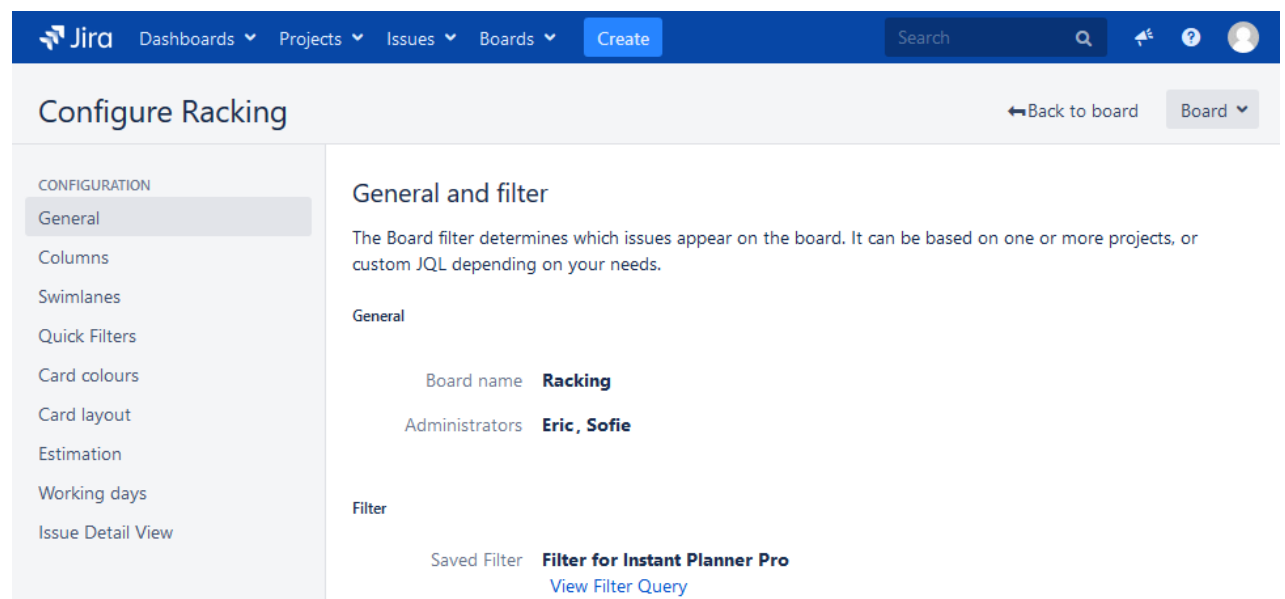
2. Choose between creating either a **Scrum** board or a **Kanban** board and then decide how to create the board by selecting one of these options:
  - Board from existing projectOR
  - Board from existing Saved Filter
3. Enter a **Board name** and select one or more **Projects** to be included in the board.
4. Click the **Create board** button.

## Configuring a Board

1. To configure a board, go to the **Board** drop-down and select **Configure**:



2. General board and filter information is displayed:



The options on the sidebar are for configuring the board, and what they are and how they work is described on the following pages.

## General and Filter

The **General** section displays **Board name** and **Administrators**. If you have editing rights, you can edit both the board name and the administrators.

The filter section shows the **Board filter**, which determines which issues appear on the board and can be based on one or more projects, or custom JQL, depending on your needs.

The screenshot shows the 'Configure Racking' page in Jira. The left sidebar contains a 'CONFIGURATION' menu with options: General, Columns, Swimlanes, Quick Filters, Card colours, Card layout, Estimation, Working days, and Issue Detail View. The 'General and filter' section is active. It displays the board name 'Racking' with an edit icon. Administrators listed are Geok Chin Koh (geoko), Sara Schill Saran (sarsc), and Sofie Rönnerberg (soffo). The filter section shows a saved filter 'Filter for Instant Planner Pro' with a 'View Filter Query' link. Shares are listed for Group: Configura Developers (VIEW), Group: Configura QAs (VIEW), User: Geok Chin Koh (EDIT), and User: Poh Guan Ng (EDIT). The owner is Geok Chin Koh. The filter query is 'project = RAC ORDER BY Rank ASC'. The ranking is 'Using Rank'. Projects in board are listed as 'Racking' with a 'View permission' link.

Clicking the **View Filter Query / Edit Filter Query** link opens a Filter view with detailed filter information. Clicking the star symbol saves the filter as a favorite in the sidebar for easy access.

There are also tools for Emailing, Sharing and Exporting the filter:

The screenshot shows the 'Filter for Instant Planner Pro' view in Jira. The top navigation bar includes 'Jira', 'Dashboards', 'Projects', 'Issues', 'Boards', and a 'Create' button. The left sidebar shows 'New search' and 'Find filters'. The main content area displays a list of filters under 'Order by Rank'. The selected filter is 'RAC-519 [Elevation] Refresh not working'. The right sidebar shows the details of the selected filter, including 'Type: Bug', 'Status: NEW (View Workflow)', 'Priority: High', 'Resolution: Unresolved', 'Affects Version/s: None', 'Fix Version/s: None', 'Component/s: None', 'Labels: None', and 'Test results: (Please add your test results here)'. The 'People' section shows the assignee as 'Unassigned' and the reporter as 'Zhen Yeap Lee'. The 'Tools' section includes 'Email', 'Share', and 'Export' buttons.

## Columns

Decide which columns to show in the board. Columns can be:

- **Added:** use the **Add column** button to add a column.
- **Removed:** click the trash bin icon to remove a column
- **Reordered:** click anywhere above the horizontal line and drag to move the column left or right.
- **Renamed:** click the column name to change it.

Columns are based upon global statuses which can be moved between columns. Minimum and maximum constraints can be set for each mapped column.

Please note that unmapped statuses will not show in the **Backlog** or the **Board/Active Sprint** views.

*Example*

The image consists of two screenshots from the Jira interface. The top screenshot shows the 'Configure Racking' page. On the left is a sidebar with 'CONFIGURATION' options: General, Columns (selected), Swimlanes, Quick Filters, Card colours, Card layout, Estimation, Working days, and Issue Detail View. The main area is titled 'Column management' and contains settings for 'Column Constraint' (set to 'None'), 'Days in column' (unchecked), and 'Simplified Workflow' (labeled 'Software Simplified Workflow unavailable'). Below these settings is a visual representation of the board columns: 'To Do' (32 issues), 'In Progress' (11 issues), 'Testing' (24 issues), and 'Done' (206 issues). Each column has a sub-section for 'NEW' issues. A blue arrow points from the 'To Do' column header in this configuration view to the 'To Do' column header in the bottom screenshot. The bottom screenshot shows the 'IPP Sprint #3' board. It features a top navigation bar with 'Jira', 'Dashboards', 'Projects', 'Issues', 'Boards', and a 'Create' button. Below this is a 'Racking' section with 'Switch sprint' and a '9 days remaining' timer. A 'Quick Filters' bar includes 'Open Issues', 'To Be Estimated', 'Blocking', 'High Priority', 'Test Rejected', 'Test Approved', 'Ready For Test', and a 'Show more' link. The board itself has four columns: 'TO DO', 'IN PROGRESS', 'TESTING', and 'DONE'. Each column contains issue cards with details like 'RAC-37 QA Testing', 'RAC-13 Check performance', 'RAC-5 Schemes', and 'RAC-484 Create data catalogue'. A blue arrow points from the 'To Do' column header in the configuration view to the 'TO DO' column header in this board view.

## Swimlanes

Control which swimlanes to show in the **Board/Active Sprint** view. A swimlane is a horizontal row on the board that can be used to group issues. Swimlanes can be based on **Queries**, **Stories**, **Assignees**, **Epics**, **Projects** or **No Swimlanes**. There could, for example, be a swimlane for crashes that need to be fixed before continuing with other issues. For boards with multiple projects, swimlanes could be used to filter on project or persons.

### Example

The image shows two screenshots from the Jira interface. The top screenshot is the 'Configure Racking' page, and the bottom screenshot is the 'All sprints' board view. A blue arrow points from the 'Swimlanes' configuration in the top screenshot to the swimlane labels in the bottom screenshot.

**Configure Racking - Swimlanes Configuration**

**Swimlanes**

A swimlane is a row on the board that can be used to group issues. Swimlane type can be changed below and will be saved automatically. Note: queries will not be lost when changing to another swimlane type.

Base Swimlanes on: **Epics**

Group issues under their epic. Issues not assigned to an epic will be shown in their own group at the bottom. Epics with no issues on the board will not be shown.

**Configure Racking - Left Sidebar**

- CONFIGURATION
- General
- Columns
- Swimlanes**
- Quick Filters
- Card colours
- Card layout
- Estimation
- Working days
- Issue Detail View

**All sprints Board View**

Racking: All sprints (Switch sprint)

QUICK FILTERS: Performance Crashes Blocking and Very High priorities High priority Medium priority Low and Lowest priority

Columns: TO DO 22 | WORK IN PROGRESS 7 | TEST IN PROGRESS 1

Swimlanes (Epics):

- Instant Planner - Basic Features 12 issues
- Instant Planner - Phase 1 Expansion Pack 6 issues

Issue Cards (Swimlane: Instant Planner - Phase 1 Expansion Pack):

- RAC-21**  
Pallet Rack accessories  
Poh Guan Ng  
Test rejected
- RAC-8**  
Position ID  
Poh Guan Ng  
Work in progress
- RAC-9**  
Material selection  
Wei Juin Lee  
Test in progress

## Quick Filters

To further filter the issues in the board, set up quick filters that can be applied in the **Board/Active Sprint** and **Backlog** views. Quick filters are based on JQL queries and can be:

- **Added:** enter a Name, JQL query, Description and then click Add. When you start typing in the JQL field, you will automatically get suggestions to choose from, and a Syntax Help is enabled by default.
- **Removed:** click the Delete button to remove a quick filter.
- **Reordered:** click the handle to the left of the quick filter name and drag it up or down in the list.
- **Edited:** click the Name, JQL or Description field to edit it.

## Example

The image shows two screenshots from the Jira interface. The top screenshot is the 'Configure Racking' page, specifically the 'Quick Filters' section. It shows a table of quick filters with columns for Name, JQL, and Description. A blue bracket on the left side of the table points to the 'Quick Filters' link in the left-hand navigation menu. The bottom screenshot shows the 'All sprints' board view. At the top of the board, there is a 'QUICK FILTERS:' section with buttons for 'Crashes', 'Blocking and Very High priorities', 'High priority', 'Medium priority', 'New tickets', and 'To be estimated'. These buttons correspond to the filters defined in the top screenshot. The board itself is divided into columns: 'TO DO 25', 'WORK IN PROGRESS 6', 'READY FOR TEST 9', 'TEST IN PROGRESS 0', and 'DONE 13'. Each column contains issue cards, such as 'Crash when Blocking a Racking System' in the 'TO DO' column and 'Crash when Copy Pasting Using the A Command' in the 'DONE' column.

**Quick Filters Configuration:**

Name	JQL	Description	Action
			Add
Crashes	type = Crash	All crash tickets	Delete
Blocking and Very High priorities	priority in (Blocker, "Very high")	Blocking and very high priority tickets	Delete
High priority	priority = High	High priority tickets	Delete
Medium priority	priority = Medium	Medium priority tickets	Delete
New tickets	created >= -14d	New tickets created within these 14 days	Delete
To be estimated	status in ("More info needed (Verification)", New, Verified, "More info needed (Estimate)")	Tickets to be estimated	Delete

**Board View (All sprints):**

QUICK FILTERS: Crashes Blocking and Very High priorities High priority Medium priority New tickets To be estimated

Columns: TO DO 25, WORK IN PROGRESS 6, READY FOR TEST 9, TEST IN PROGRESS 0, DONE 13

Issues shown include: RAC-479 (Crash when Blocking a Racking System), RAC-42 ([Animation properties] Animation settings are not working as), RAC-9 (Material selection), and RAC-478 (Crash when Copy Pasting Using the A Command).



Below are a few examples on JQL syntax that can be used to set up quick filters:

- Priority = "High" Find all issues with "High" priority.
- Priority != "Very low" Find all issues except those that have the "Very low" priority.
- Status in ("New", "Verified", "To Do") Find all issues which have the status "New", "Verified", or "To Do".
- Status not in (New, Verified) Find all issues except those that have the status "New" or "Verified".
- fixVersion is EMPTY Find all issues without any Fix Version
- Developer is not EMPTY Find all issues with developer assigned.
- created >= -14d Find all issues created for the past 14 days including today.
- created < 1w Find all issues created before 1 week ago.
- Type = Task AND Developer is EMPTY Find all issues with issue type task and developer is unassigned.
- status = New OR Developer is EMPTY Find all issues with issue status new or issues with developer unassigned.

## Card colours

Choose a method for assigning colours to the cards in the **Board/Active Sprint** and **Backlog** views. If no method is selected, the cards will not have a coloured edge. Any changes to the colour configuration for a method are saved immediately, so you can switch back to it later if you wish.

*Example:*

The image consists of three screenshots from the Jira interface, illustrating how to configure card colors and how they appear in different views. A blue arrow traces the flow from the configuration page to the Backlog and then to the All sprints view.

**Top Screenshot: Configure Racking**

The 'Card colours' section is shown. The 'Colours based on' dropdown is set to 'Priorities'. A table lists the color assignments for different priority levels, each with a 'Delete' button.

Color	Priority	Action
[Red square]	Blocker	Delete
[Dark red square]	Highest	Delete
[Pink square]	High	Delete
[Orange square]	Medium	Delete
[Grey square]	Low	Delete
[Light grey square]	Minor	Delete
[Green square]	Very high	Delete

**Middle Screenshot: Backlog**

The 'Backlog' view for 'IPP Sprint #3' is shown. The cards have colored edges corresponding to their priority: RAC-9 (Medium, orange), RAC-478 (Very high, dark red), and RAC-479 (Blocker, red).

**Bottom Screenshot: All sprints**

The 'All sprints' view is shown, displaying cards across different stages: TO DO, WORK IN PROGRESS, READY FOR TEST, TEST IN PROGRESS, and DONE. The cards maintain their colored edges based on priority, such as RAC-479 (Blocker, red) in 'TO DO' and RAC-478 (Very high, dark red) in 'DONE'.

## Card layout

In addition to the fields that are always shown on the cards – **Key**, **Summary** and **Epic** – it is possible to add up to three extra information fields. The setup could look different for the **Board/Active sprint** view and for the **Backlog** view.

*Example:*

The image consists of three screenshots from the Jira interface, illustrating the 'Card layout' configuration and its application in different views.

**Top Screenshot: Configure Racking**

The 'Configure Racking' page shows the 'Card layout' configuration. The 'Backlog' section lists the fields to be displayed on the backlog cards: 'Linked Issues', 'Priority', and 'Status'. The 'Active sprints' section lists the fields to be displayed on the active sprint cards: 'Affects Version/s', 'Developer', and 'Status'. Blue arrows point from these field lists to the corresponding views in the bottom screenshots.

**Middle Screenshot: Backlog View**

The 'Backlog' view shows a list of issues. The first issue, 'RAC-9 Material selection', has a card layout showing 'None', 'Medium', 'Ready for test', and 'Instant Planner - Pha...'. The second issue, 'RAC-478 Crash when Copy Pasting Using the A Command', has a card layout showing 'None', 'Very high', 'Test approved', and '2h'. The third issue, 'RAC-479 Crash when Blocking a Racking System', has a card layout showing 'None', 'Blocker', 'Verified', and '2h'. Blue boxes highlight these card layouts, and a blue arrow points from the 'Backlog' configuration section to this view.

**Bottom Screenshot: All sprints View**

The 'All sprints' view shows a Kanban board with columns: 'TO DO 24', 'WORK IN PROGRESS 7', 'READY FOR TEST 9', 'TEST IN PROGRESS 0', and 'DONE 13'. The 'Active sprints' section shows the first column. The first issue, 'RAC-479 Crash when Blocking a Racking System', has a card layout showing 'None', 'Verified', and '2h'. The second issue, 'RAC-42 [Animation properties] Animation settings are not working as', has a card layout showing 'Instant Planner - Ba...', 'Wei Jun Lee', 'Ready for test', and '2h'. The third issue, 'RAC-17 Forklift layout insert animation', has a card layout showing 'Instant Planner - Ba...', 'Poh Guan Ng', 'Ready for test', and '2h'. The fourth issue, 'RAC-478 Crash when Copy Pasting Using the A Command', has a card layout showing 'None', 'Test approved', and '2h'. Blue boxes highlight these card layouts, and a blue arrow points from the 'Active sprints' configuration section to this view.

## Estimation

Issues can be estimated when in the **Backlog** view to get an idea of how much work is being committed to in a sprint. Choose to estimate on;

- **Story Points:** estimate issues in the Backlog by entering values for Story Points. Your velocity from sprint to sprint will be measured against these estimates.
- **Original Time Estimate:** estimate issues in the Backlog using durations (e.g. hours, ideal days). Your velocity from sprint to sprint will be measured against these estimates.
- **Issue Count:** your velocity from sprint to sprint will be measured by the number of issues completed in each sprint. However, you will not be required to enter any estimates against issues in the Backlog.

*Example:*

The image shows two screenshots from the Jira interface. The top screenshot is the 'Configure Racking' page, specifically the 'Estimation' tab. It shows the 'Estimation Statistic' set to 'Original Time Estimate' and 'Time Tracking' set to 'Remaining Estimate and Time Spent'. A blue arrow points from the 'Original Time Estimate' dropdown to the 'Original Time Estimate' field in the backlog view below. The bottom screenshot is the 'Backlog' view for 'IPP Sprint #3'. It shows a list of issues with their estimated time in hours. A blue arrow points from the 'Original Time Estimate' field in the configuration to the '4h' estimate for the issue 'Instant Planner - Pha...'. Another blue arrow points from the 'Remaining Estimate and Time Spent' radio button in the configuration to the 'In Progress: 10h of 42h (Original Time Estimate)' status bar at the top of the backlog. The backlog view also shows a progress bar at the top with 'Not Started: 20h of 42h (Original Time Estimate)', 'In Progress: 10h of 42h (Original Time Estimate)', and 'Done: 12h of 42h (Original Time Estimate)'. The issues listed are:

- RAC-9 Material selection (None, Medium, Ready for test) - 4h
- RAC-478 Crash when Copy Pasting Using the A Command (None, Very high, Test approved) - 2h
- RAC-12 Double racks (None, Medium, Test rejected) - 20h
- RAC-92 Stretch uprights (None, Medium, Test rejected) - 20h

## Working days

These settings allow you specify **Time Zone**, **Standard Working Days** and **Non-Working Days**.

Jira

Dashboards

▼

Projects

▼

Issues

▼

Boards

▼

Create

Search

Q

?

Configure Racking

← Back to boardBoard ▼

CONFIGURATION

General

Columns

Swimlanes

Quick Filters

Card colours

Card layout

Estimation

Working days

Issue Detail View

Working days

These settings allow you to highlight or exclude non-working days from reports and gadgets.

They apply to the following reports: Burndown Chart, Sprint Report, Epic Report, Version Report, Control Chart; and the following gadgets: Sprint Health Gadget, Burndown Gadget.

Time Zone

Region: System default ▼

Time Zone: (GMT+00:00) UTC ▼

Standard Working Days

Every

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

☐ Sunday

Non-Working Days

Dates: No dates

Add Date

## Issue Detail View

Clicking an issue in the **Backlog** view or the **Board/Active sprint** view brings up a detailed view to the right on the board. The contents of this Issue Detail view are configured here, and the available fields are categorized as **General Fields**, **Date fields**, **People** and **Links**. Fields can be:

- **Added:** select the desired field and click the **Add** button.
- **Deleted:** click the **Delete** button on the field you want to delete from the Issue Detail view.
- **Reordered:** click the handle to the left of the field name and drag up or down in the list.

The screenshot shows the Jira interface for configuring a board. The top navigation bar includes 'Jira', 'Dashboards', 'Projects', 'Issues', 'Boards', and a 'Create' button. A search bar and user profile icon are on the right. The main header is 'Configure Sara's Demo Board' with a 'Back to board' link and a 'Board' dropdown. A left sidebar lists configuration options: 'CONFIGURATION', 'General', 'Columns', 'Swimlanes', 'Quick Filters', 'Card colours', 'Card layout', 'Estimation', 'Working days', and 'Issue Detail View' (which is selected). The main content area is titled 'Issue Detail View' and contains the instruction 'Add, delete or reorder fields on the Issue Detail View.' It is divided into four sections: 'General fields', 'Date fields', 'People', and 'Links'. Each section has a 'Field name' label and a list of fields with 'Add' and 'Delete' buttons. In 'General fields', 'Affects Version/s' is added, while 'Component/s' and 'External issue ID' are marked for deletion. 'Date fields' has 'Created' added. 'People' has 'Approvers' added. 'Links' has 'Linked Issues' added.

**Configure Sara's Demo Board** [Back to board](#) **Board** ▼

**Issue Detail View**  
Add, delete or reorder fields on the Issue Detail View.

**General fields**

Field name

Affects Version/s **Add**

Component/s **Delete**

External issue ID **Delete**

**Date fields**

Field name

Created **Add**

**People**

Field name

Approvers **Add**

**Links**

Field name

Linked Issues **Add**