Advanced Roadmaps For Jira Server (Formerly Portfolio)

1 Day

Classroom, Webinar

This course is ideal for new users of Jira Portfolio App (Now Advanced Roadmaps for Jira Server), Especially those with the requirements to plan and project the delivery of software projects run by agile teams.

About this course

Is this course right for me?

This course is ideal for new users of Jira Portfolio. It may be especially helpful to those requiring the ability to plan the delivery of software projects led by agile teams.

Objectives and outcomes

By the end of this course, delegates will have a solid understanding of the strengths and capabilities of Jira Portfolio.

They will be able to manage projects through live plans, work through a variety of scenarios to understand the implications of changes to projects and integrate data directly into Jira Software to connect with teams on the ground.

Also included is the managing of teams, their skills, and reporting on efforts in relation to releases and themes.

Prerequisites

-A basic understanding of Jira use cases.

-A basic understanding of agile concepts including scrum and/or kanban.

-Access to a laptop

-Internet connection

Modules breakdown

Module 1: Introduction

- What is Jira Portfolio?
  - Benefits and purpose of Portfolio
  - Server vs. Cloud
  - Portfolio plans
- Accessing plans
- Permissions
- Navigating the interface
  - Views
  - Actions
- Building a plan

Module 2: Scope

- Epics
- Stories/tasks
  - Subtasks
- Above the epic
  - Multi-project plans
- Estimates
- Rank
- Dependencies
- Target dates
- Sprints
- Kanban vs. scrum and mixed plans
- Calculating the plan
- Committing to Jira

Module 3: Teams

- Creating a team
  - Associating boards
    - Parallel sprints
- Adding resources
  - Jira users
  - Virtual users
- Assigning resources
- Resource availability
- Shared teams
  - Availability vs. allocation
- Modifying teams
- Viewing teams in Jira issues
- Stages and skills

Module 4: Above the epic

- Jira releases
- Creating releases
- Cross-project releases
- Assigning releases
- Editing releases
- Reading the release timeline
- Later releases

Module 5: Reporting

- Using reports
  - View settings
  - Filters
  - Sharing
  - Exporting
  - Reading additional details – capacity reporting
- Themes
- Programs
- JQL

Module 6: Configuration and what-ifs

- Configuration
  - Planning
  - Source data
  - Access control
- Scheduling factors
  - Viewing scheduling factors
- Advanced configuration
  - Scenarios
    - Building scenarios
    - Commits in scenarios
  - Stages and skills (set-up)
- Atlassian administration
  - Jira
    - Issue types
    - Issue type schemes
  - Portfolio
    - Hierarchy
    - Dependencies
    - Permissions

Module 7: Wrap-up

- Questions and answers
- Additional resources

"The instructor was great! She knows her stuff and went out of her way to make sure we understood and got what we needed for Portfolio."

Donnalee, Mass Mutual

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