

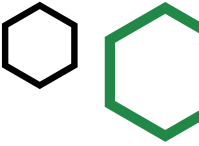


Atlassian Project Management Guide

5 immediately actionable tips to eliminate project chaos

Know your project status in real-time.
Without having to ask, chase, or gather information from countless sources.





Welcome!

Thank you for downloading the Atlassian Project Management Guide 2024.

I've created this guide to be a reliable companion for managing your projects from now on.

Refer to the following points whenever they are relevant to you.

Clear overview of all projects in real-time – without chaos and tool-hopping

When your team has to dig through emails and folders, projects lose momentum.

Use a central source of information and improve the visibility of all project steps and tasks with tools like Jira for project structure and Confluence as a central document repository.



Your Vladyslav Kalynkovskiy



Vladyslav Kalynkovskiy

**Enterprise Account Manager
at Polygran GmbH**

Over 40,000 users have made their projects clearer and more effective with Polygran. This guide contains valuable insights from their experiences.

01

Project Planning with Jira Software

Jira Software supports all types of agile methodologies, such as Kanban or Scrum.

A **Kanban board** provides a clearer visualisation of your tasks and always shows your team what needs to be done next.

Kanban Boards provide transparency at every project step

With Kanban boards from Jira, your team can continuously improve cycle times and efficiency:

Enhancing Transparency

Kanban Boards give teams a clear overview of the status of all tasks, stories, issues, bugs, and tasks, making communication more effective (see point 3 for more details).

Optimising Workflow

Kanban Boards visually display task phases and allow teams in Jira Software to customise workflows from simple to complex according to their needs.

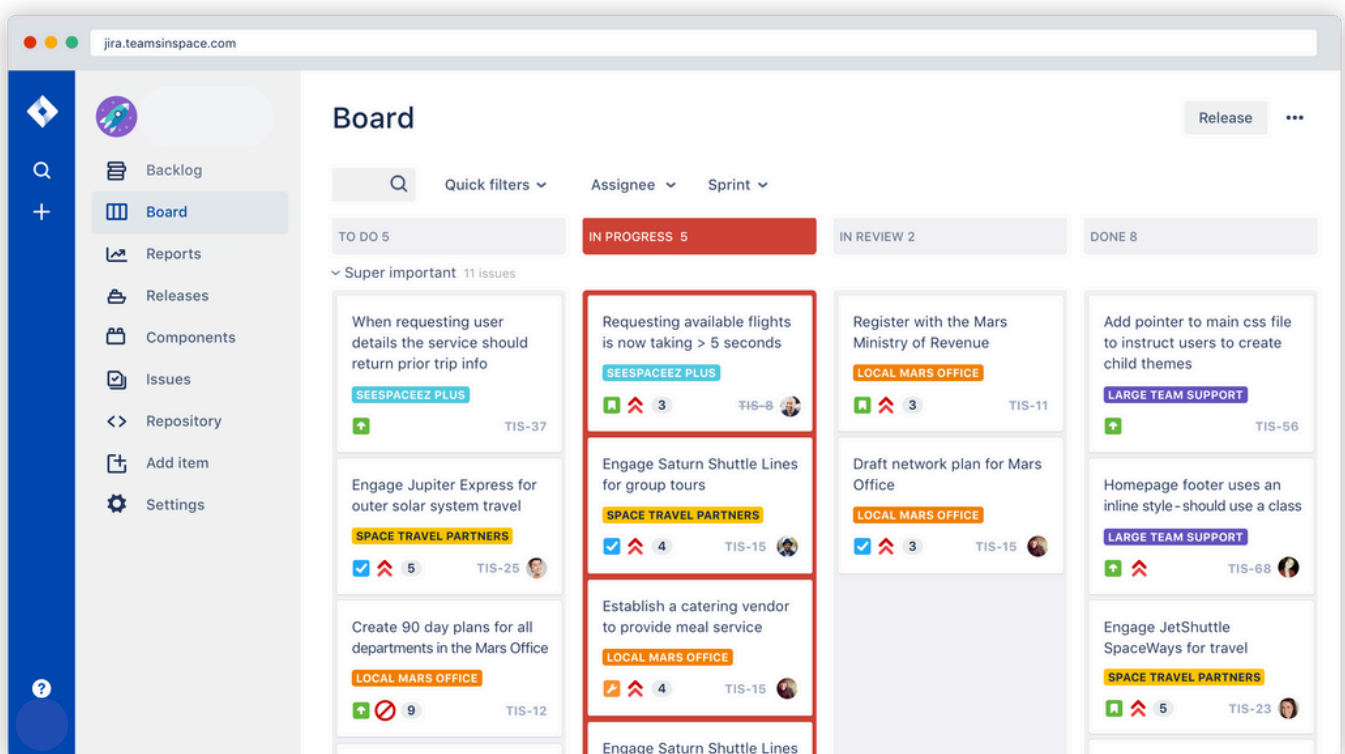
Easily Identifying Bottlenecks

WIP (Work in Progress) shows the number of active stories per status. WIP limits prevent bottlenecks, ensuring a smooth workflow.

Continuous Improvement

Agile reports for Kanban boards provide real-time metrics to identify cycle times and blockages in the workflow.

Example of a Kanban Board:

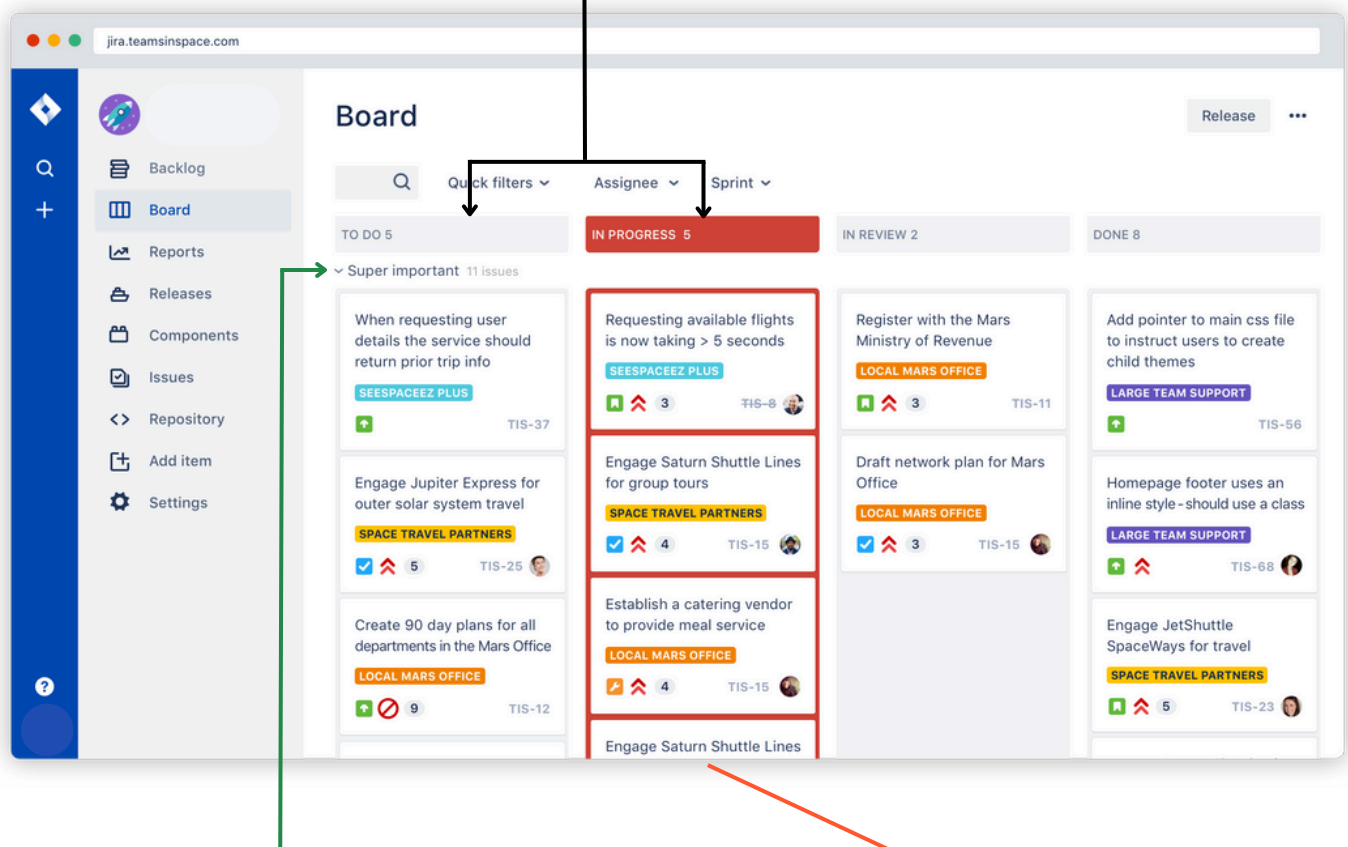


Project Planning with Jira Software

Workflow

Tasks in "To Do" can be moved to "In Progress" and vice versa.

Workflows can be customised to meet the specific needs of your team or project.



Swimlanes

Horizontal swimlanes can make your projects even clearer.

With swimlanes, you can separate and group your projects by **employee, product, urgency**, and more.

→ Swimlanes in Jira are **individually configurable** and can be tailored precisely to the needs of your team.

WIP Limits

WIP (Work in Progress) limits can be set for each status, such as "In Progress".

For example, this means that only a maximum of 10 tasks can be worked on simultaneously in the "In Progress" status.

→ This helps to identify and prevent **bottlenecks** early on.

Project Planning with Jira Software

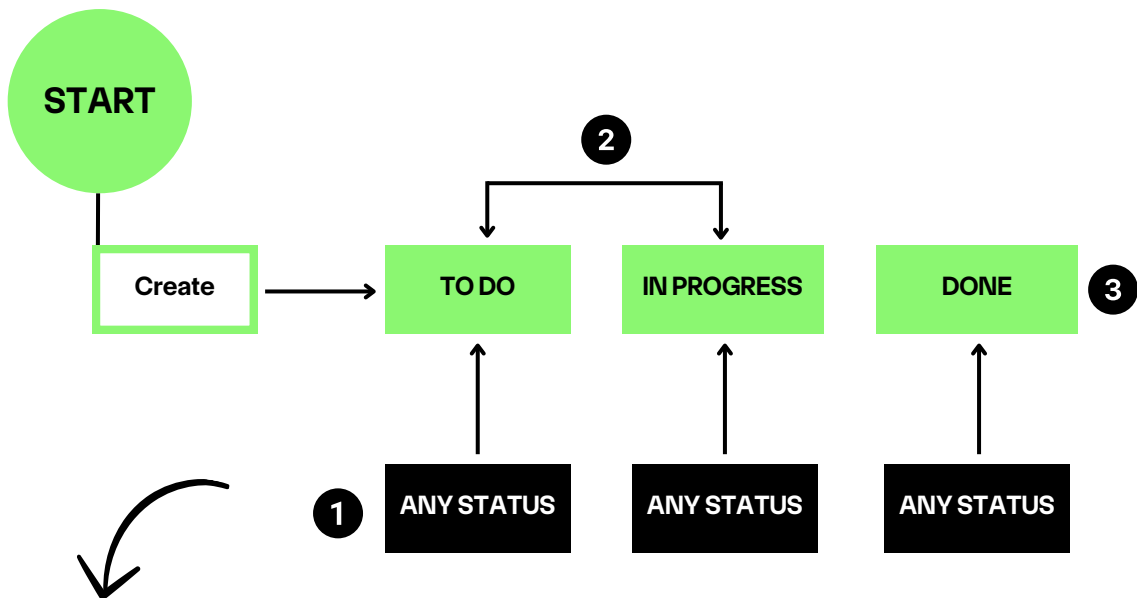
Customising Jira Workflows

Workflows are processes that your issues (project steps) go through from creation to completion.

Jira offers built-in workflows that you can use straight away. Alternatively, you can create your **own workflows** (which we recommend).

We support our clients in creating new workflows, ensuring they are perfectly and individually tailored to the needs of the team → this **saves time** and **avoids chaos** in collaborative project work.

Example of a very simplified workflow:



- 1 Status:**

A status indicates where the project is within the workflow. The status helps everyone in the team to get a quick overview of the project's progress.

Examples:
"Open," "In Progress," "Under Review," "Planned," "Pending," "On Hold," etc.
- 2 Transition:**

A transition is an action that changes the status of an issue and works only in one direction. To switch an issue between two statuses back and forth, two transitions are necessary.
- 3 Resolution:**

When a task is completed and no longer open, it requires a resolution status.

Examples:
"Done," "Completed," "Won't Do," etc.

Project Planning with Jira Software

Jira Workflow Examples from Our Clients

We assist our clients in creating customised workflows tailored to their specific needs.

Client Workflow Example 1

Status

Transition

Resolution



Client Workflow Example 2



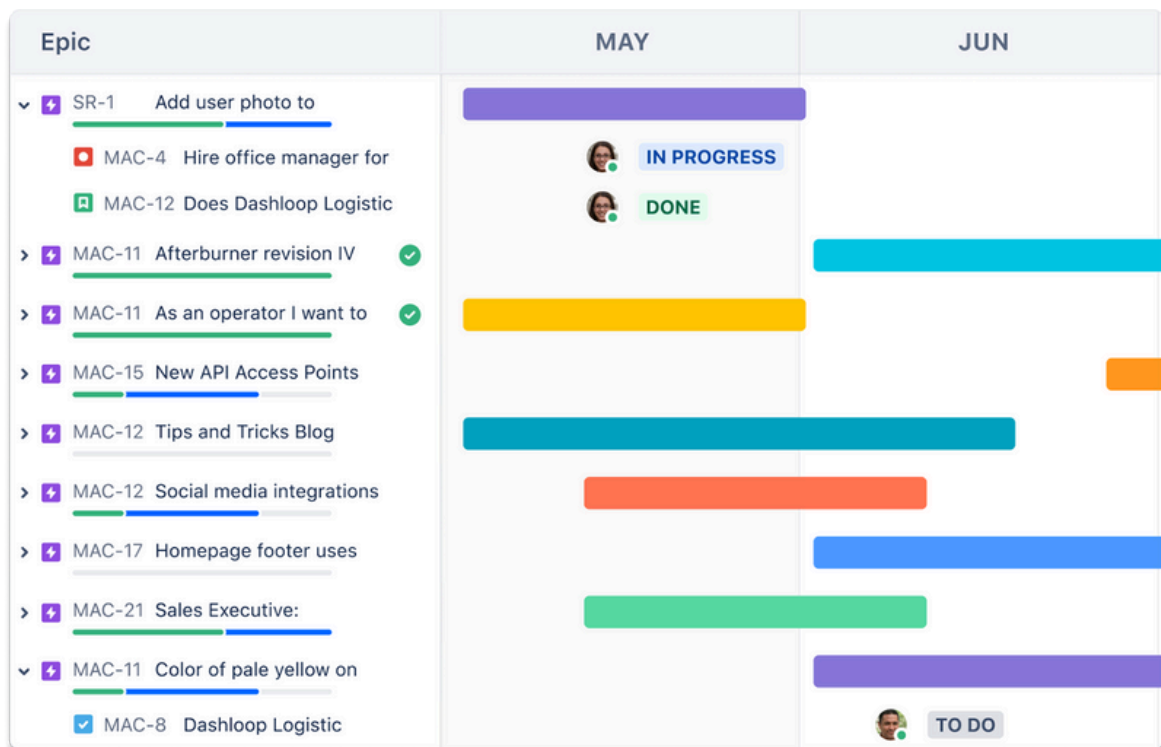
Project Planning with Jira Software

03

A timeline in Jira helps you stay up-to-date

Create an **interactive timeline** by adding large projects (Epics) and tasks, specifying dependencies, and setting deadlines.

This helps the team collaborate effectively, as all team members can see the dependencies of their tasks and continuously monitor the project's progress.



Epic

A large project that encompasses many smaller tasks is called an Epic.

Example: Creating a website for a small business.



Bug

An issue that needs to be resolved.

Example: The website loads too slowly.



Story

A requirement from the user's perspective.

Example: As a website visitor, I want to quickly access the homepage.



Task

A task that needs to be completed. Tasks cover all those things that don't quite fit into other issue types.

Example: Write blog posts. Design a logo. Develop the website.

Project Planning in Confluence

Now that we have taken a closer look at Jira, you can create a **dedicated space** in Confluence for your project to centrally collect all essential information.

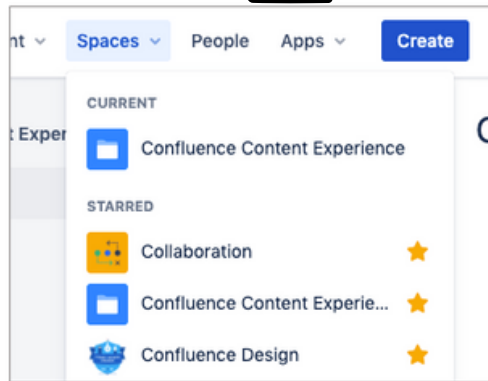
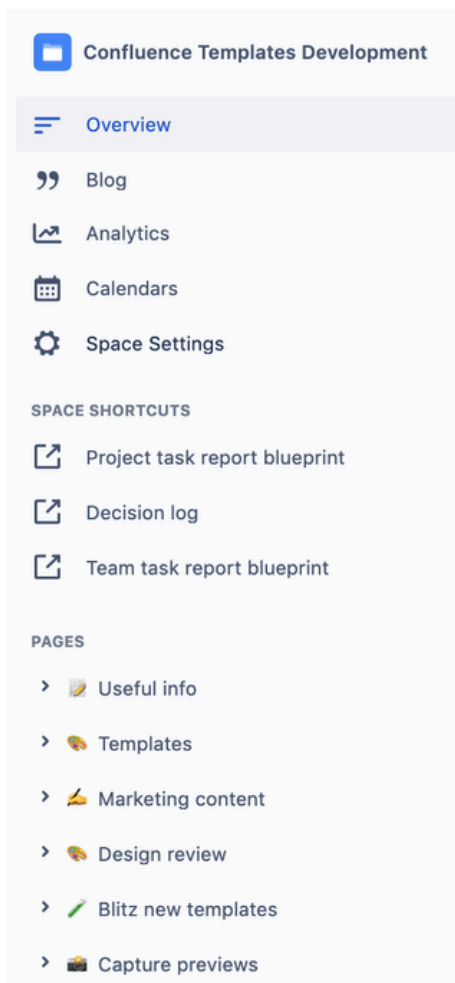
This facilitates **easy access** to project information and enhances the availability of information for your team.

An organised and structured hierarchy in Confluence is important.

You can structure the documentation in two ways:

- You can set up a separate space (Space) for each project team and create a dedicated page (Page) for larger projects.
- Alternatively, you can create a space (Space) for each project and a page (Page) for each release cycle or product launch.

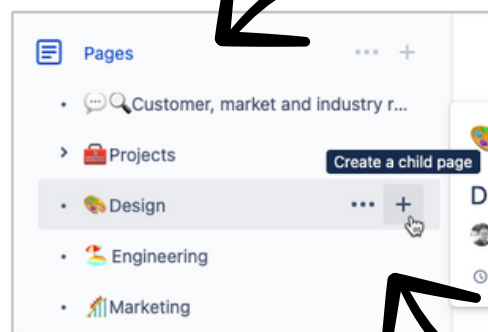
Here is an example of a well-structured hierarchy in Confluence:



Spaces

Create spaces for different project teams such as: Marketing & Sales, IT Development, etc.

→ This way, each team can find all the important information in one place.



Pages

Create a page for each larger project, for example. You can also create child pages if you want to break down the projects further.

Project Planning in Confluence

Using Templates for Quick Starts

Utilise one of over **80 customisable** Confluence templates, ranging from strategy and planning to reporting. These templates enable a quick start while ensuring consistency across various projects.

This leads to standardised communication and documentation, which can also reduce the onboarding time for new team members.

Example Confluence Template:

Projektplan

Einflussnehmer	Einflussnehmer @ erwähnen
Genehmiger	@ Genehmiger
Beitragende	@ Beitragende
Fachkundiger	@ Stakeholder
Zielsetzung	Fassen Sie die Zielsetzung in 1 - 2 Sätzen zusammen.
Fälligkeitstermin	Geben Sie // ein, um ein Datum hinzuzufügen.
Wichtige Ergebnisse	Führen Sie erwartete Ergebnisse und Erfolgskriterien auf.
Status	NICHT BEGONNEN / IN ARBEIT / ABGESCHLOSSEN

😊 Problemstellung
Beschreiben Sie das Problem und seine Auswirkungen. Fügen Sie die Hypothese ein, die Ihre Arbeit antreibt ("Wir denken, dass X zu Y führen wird, und wir werden wissen, dass wir es geschafft haben, wenn Z").

📅 Zeitleiste
Geben Sie /planner ein, um eine visuelle Roadmap zu erstellen, damit Ihr Team auf Kurs bleibt. Wenn Sie Workflows oder Zeitangaben bearbeiten möchten, wählen Sie den folgenden Platzhalter aus und tippen auf das Stiftsymbol.

Roadmap Planner

The roadmap shows two lanes: Lane 1 (red) and Lane 2 (blue). Lane 1 contains three features: Feature 1 (Nov-Dec), Feature 2 (Jan-Feb), and Feature 3 (Mar). Lane 2 contains two tasks: iOS app (Nov-Dec) and Android app (Mar). The timeline spans from October 2021 to March 2022.

Mentions

With @-mentions, you can directly add all team members involved in the project.

Roadmap

With a visual roadmap, you keep track of all tasks and always see if you and your team are still on course.

Maximising the benefits of both tools together

BONUS TIP

Easily Link Jira and Confluence

Once your team is familiar with Jira and Confluence documentation, **linking both tools** can streamline your workflow.

You can easily share information without switching between different apps.

In Jira, you can directly embed Confluence pages, and in Confluence, you can directly connect projects with Jira.

A particular advantage is that you can create tasks **directly in Confluence that then appear in Jira**. This integration simplifies and enhances the agile workflow by quickly resolving issues.

Example: Jira Software Task

The screenshot displays a Jira task titled "LinkedIn Awareness Campaign" (ID C1-1). The task description field contains a rich text editor with a placeholder text: "Press Ctrl + / to learn time-saving keyboard shortcuts." Below the editor are buttons for "Speichern" (Save) and "Abbrechen" (Cancel). Under the "Confluence-Seiten" (Confluence Pages) section, a dropdown menu is open, showing options: "Seite", "Whiteboard" (marked "DEMNÄCHST VERFÜGBAR"), and "Datenbank" (marked "DEMNÄCHST VERFÜGBAR"). A search bar is present with the text "Seiten durchsuchen oder in einem Link einfügen". To the right, a sidebar shows the task's details, including the assigned person (Catharina Guß), author, priority (Medium), and creation/updated dates (10. Apr. 2024). A "Konfigurieren" (Configure) button is visible at the bottom right of the sidebar.



Easily Integrate Confluence into Jira

Open your Jira task and link relevant Confluence pages with just one click.

→ This allows all team members to quickly find the information they need without searching for long.

You can also create a new Confluence page directly from your Jira task.


→ This saves you time and ensures the information is correctly linked right away.



Questions or Feedback?

Our team is happy to help you make your projects even clearer and implement a smooth process.

Feel free to schedule a personal meeting.

 [Schedule a Meeting](#)

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