Epic's Progress

Overview

This example illustrates a possibility to use the sumUp Custom Fields in Jira instances for keeping track of an epic's progress.

To use this example Jira Software and admin rights are **needed**.

Agile Project Management / APM-1

Agile Management Improvement

| Edit | Comment | Assign | More ▾ | | To Do | In Progress | Done | | Admin ▾ |

Details

Type:	🟣 Epic	Status:	IN PROGRESS (View Workflow)
Priority:	↑ Medium	Resolution:	Unresolved
Labels:	None		

| General | **Progress** |

Total Stories:	5
Total Story Points:	29
Time Tracking:	5.82 %
Status Categories:	5 Issues Total
Total Progress:	1 / 5 Issues resolved (20.00 %)

Description

Click to add description

Attachments

Drop files to attach, or browse.

Issues in Epic +

APM-2	Story 1		🔖	IN PROGRESS	admin
APM-3	Story 2		🔖	TO DO	*Unassigned*
✅ APM-4	Story 3		🔖	DONE	admin
APM-6	Story 4		🔖	TO DO	*Unassigned*
APM-7	Story 5		🔖	IN PROGRESS	admin

The Custom Fields will give an overview over the epic's stories:

- Total number of stories
- Total number of story points
- Total Time Tracking
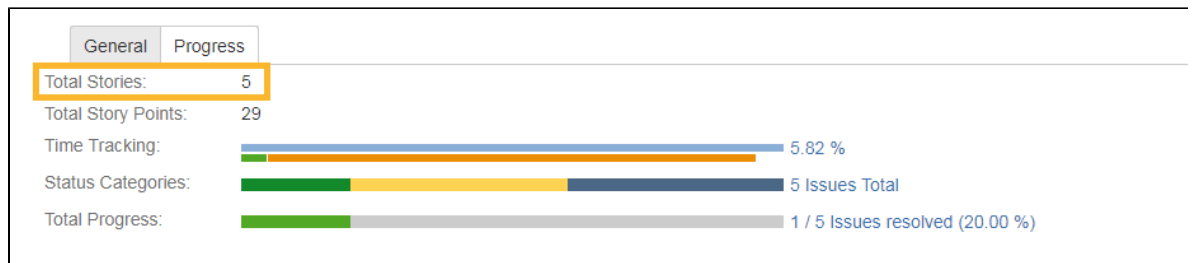- Total Status Categories

- Total Progress

The following steps show how to setup the Custom fields and how to display them in the right way in an epic.

Creating the Custom Fields

(1)

Total Stories

The "Total Stories" field's job is to count the number of stories belonging to the epic.

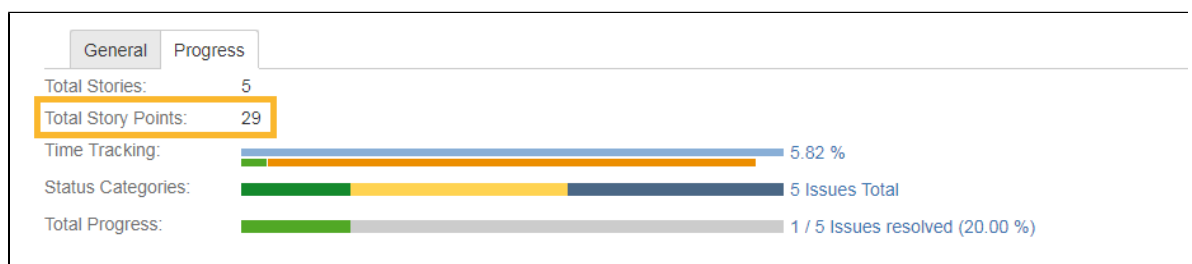|	
Name	Total Stories
Field type	sumUp Calculated Field
JQL	`issuetype = Story AND "Epic Link" = currentIssueKey`
sumUp Rule	Number of issues

> If you are uncertain about creating a sumUp Text Custom Field, please refer to **this page**.

(2)

Total Story Points

The next custom field that will be created is "Total Story Points".

This Custom Field has the same job as the field "Total Stories" but counting the story points in the stories instead.

Name	Total Story Points
Field type	sumUp Calculated Field
JQL	`issuetype = Story AND "Epic Link" = currentIssueKey`
sumUp Rule	Total Story Points

If there is no field called "**Story Points**" which gets displayed in your **issuetype** "**Story**", click **here** to see how this can be managed.

For this Custom Field a specific sumUp rule for summing up the story points of the related stories is needed.

Add new rule

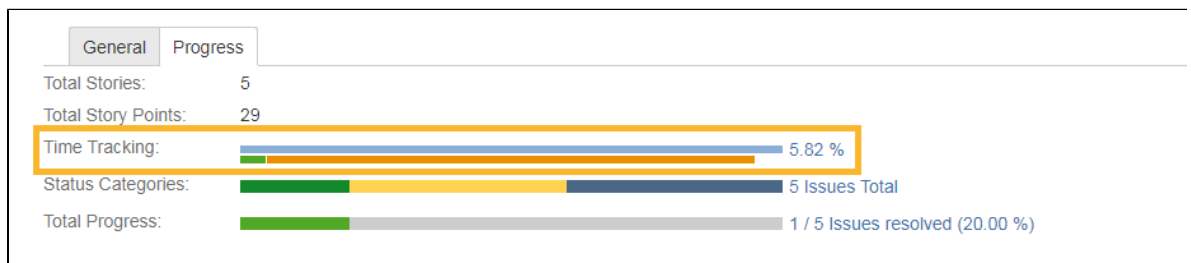|	
Select Field*	Story Points
Select Method	Summarize Values
Custom name	Total Story Points ∑ ∅
Output format	◉ Standard
	○ Velocity Template
Decimal Places	0
Prefix	
Suffix	
Non indexed value	☐
	For example, scripted fields, custom time tracking fields and more custom fields, calculation can rise very quickly depending on the script and number of values
Number Format	Default
	Test your regular expression

Save   Cancel

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③

Time Tracking

The sumUp Time Tracking Progress Custom Field provides a general overview over the time tracking status in the stories.

- Time that was estimated
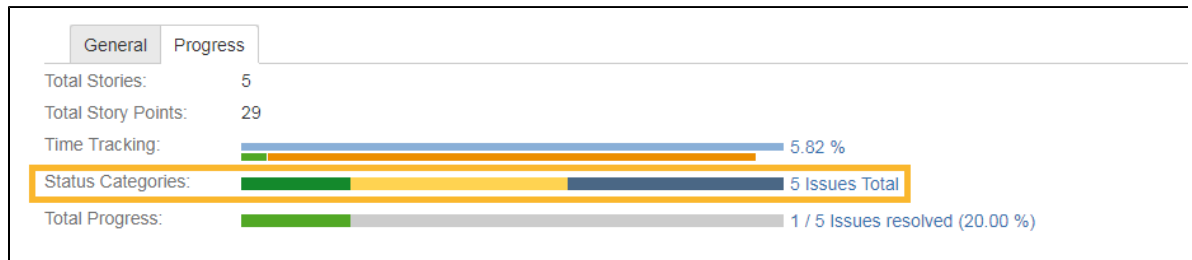- Time that was logged
- Time that is still remaining,

General	Progress

Total Stories:	5
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Status Categories:	5 Issues Total
Total Progress:	1 / 5 Issues resolved (20.00 %)

Name	Time Tracking
Field type	sumUp Calculated Progress Field
Style	Time Tracking
JQL	`issuetype = Story AND "Epic Link" = currentIssueKey`

sumUp Rule	*No required for this type of Progress field*

4   Status Categories

The field "Status Categories" helps to keep track of issues by displaying how many issues are open, in progress or done.
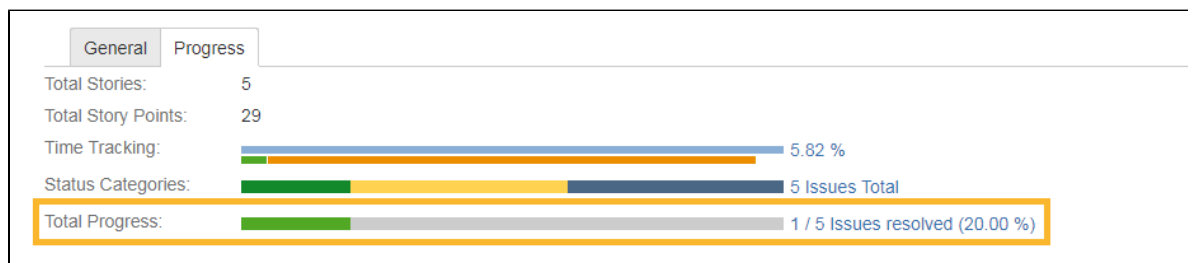
General	Progress
Total Stories:	5
Total Story Points:	29
Time Tracking:	5.82 %
Status Categories:	5 Issues Total
Total Progress:	1 / 5 Issues resolved (20.00 %)

Name	Status Categories
Field type	sumUp Calculated Progress Field
Style	Status Categories
JQL	`issuetype = Story AND "Epic Link" = currentIssueKey`
sumUp Rule	Number of issues

5   Total Progress

The last field is "Total progress". It is also a Progress Custom Field.

General	Progress
Total Stories:	5
Total Story Points:	29
Time Tracking:	5.82 %
Status Categories:	5 Issues Total
Total Progress:	1 / 5 Issues resolved (20.00 %)
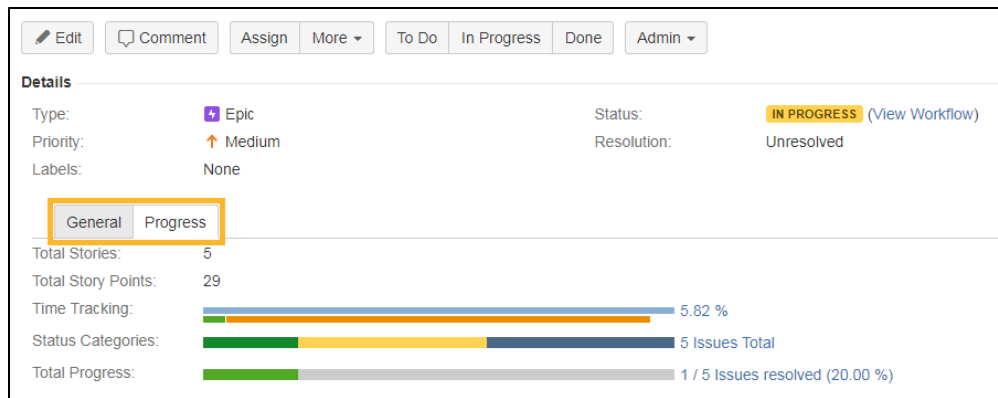
Name	Total Progress
Field type	sumUp Calculated Progress Field
Style	Progress
JQL	`issuetype = Story AND "Epic Link" = currentIssueKey`
sumUp Rule	Number of issues

Creating own tab with the Custom Fields

Once all needed custom fields are created, they can be located in a separate tab in the issuetype "epic".

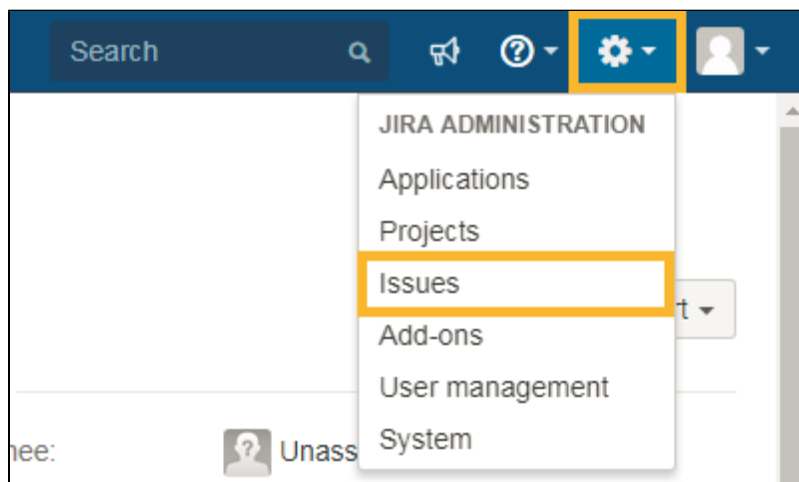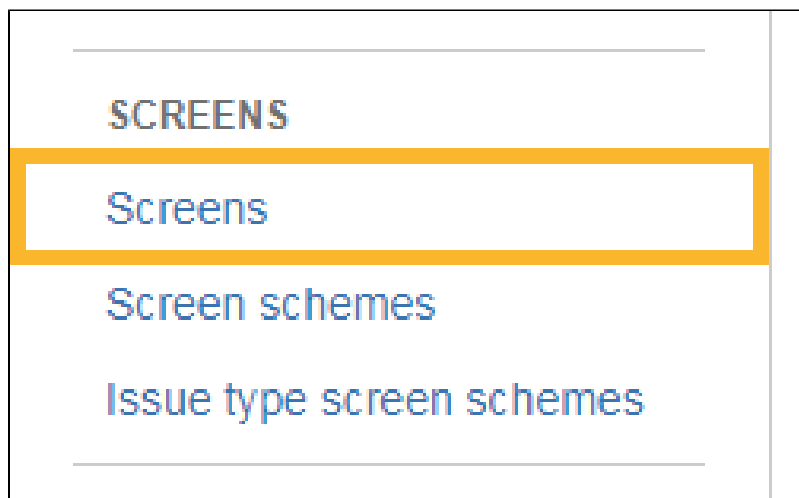**1**

| Edit | Comment | Assign | More ▾ | To Do | In Progress | Done | Admin ▾ |

Details

Type:	⚡ Epic	Status:	**IN PROGRESS** (View Workflow)
Priority:	↑ Medium	Resolution:	Unresolved
Labels:	None		

| General | Progress |

Total Stories:	5
Total Story Points:	29
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Total Progress:	1 / 5 Issues resolved (20.00 %)

2

Head over to **Administration Issues**

Search 🔍 📢 ❓▾ ⚙▾ 👤▾

JIRA ADMINISTRATION

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3

Click on "**Screens**" in the left-hand tab in settings.

SCREENS

Screens

Screen schemes

Issue type screen schemes

Now choose the screen where the new tab should be created and click on "**Configure**".
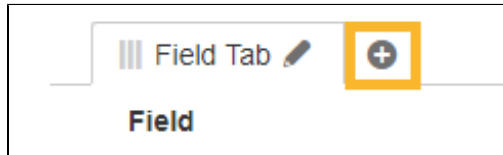
4

10203   **APM: Scrum Default Issue Screen**   • APM: Scrum Default Screen Scheme   Configure

5

By clicking on the ⊕ button a new tab will be created and can be named (in this example it's called "Progress").

||| Field Tab ✎   ⊕

Field

6

Finally Custom fields can be added by typing in their name and clicking **Add**.

Adding "Story Points" to issuetype "Story"

"Story Points" is a field that comes with the application **Jira Software**.

Once installed, the custom field is set up and ready to go. No extra custom field has to be created.

If "Story Points" does not get displayed in the specific issue type, the easiest way is to go to the specific issue and select "Admin" and then "Add field".

Agile Project Management / APM-2

Story 1

| ✎ Edit | 💬 Comment | Assign | More ▾ | To Do | In Progress | Done | Admin ▾ |

Details

			Add field
Type:	🔲 Story		Permission helper	Status:	RESS (View Workflow)
Priority:	↑ Medium		Notification helper	Resolut	ved
Labels:	None				

If you still have questions about Story Points, please refer to the additional **information**.

Gadget	sumUp Custom Fields
Description	Demonstration of how to use sumUp Custom Fields to track the progress of an epic.

If you still have questions, feel free to refer to our support team.