

The Power of Excel, Now in Jira and Confluence

Everything you must know about leveraging the power of Excel in Jira and Confluence. For all of your project management needs.



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INTRODUCTION

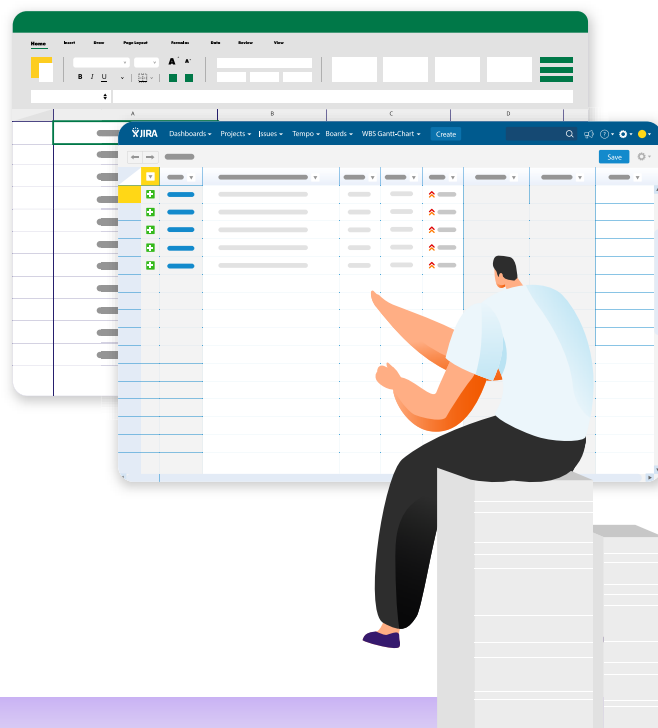
Companies and projects go hand in hand. Whether they're internal or customer/client projects, successfully managing these projects translates into a powerful competitive advantage for the companies.

One of the best ways to ensure effective project management is by deploying agile solutions like Atlassian's Jira and Confluence. Both solutions facilitate project managers to efficiently stay on top of different project and team needs.

That said, these solutions still lack some data analysis, reporting, and visualization capabilities that are important to improve project and team performance. We believe that your Jira and Confluence can perform even better when complemented with Excel capabilities.

Wondering how to merge Atlassian software and Excel functions together?

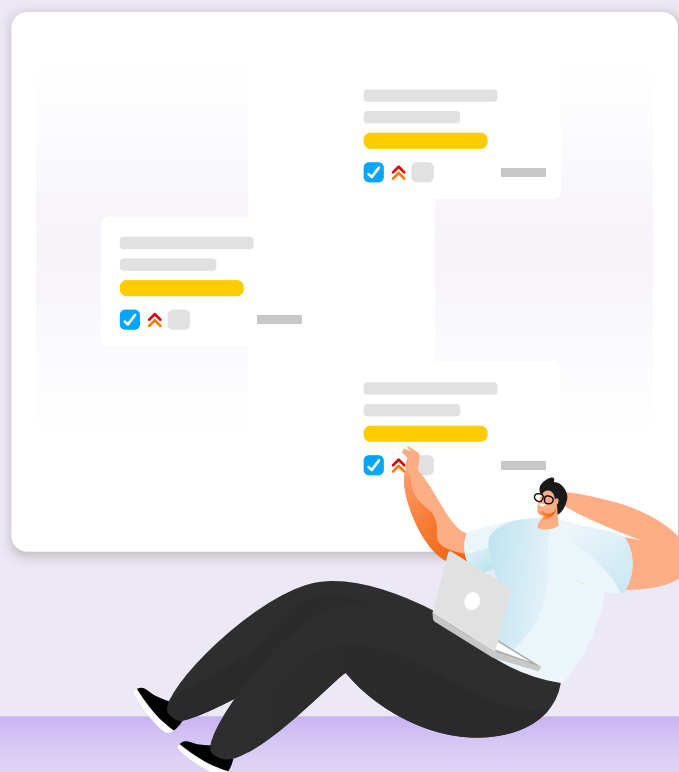
The Power of Excel, Now in Jira and Confluence e-book highlights the Excel features that can supercharge your Jira and Confluence project management process. You'll also learn how to choose the best Atlassian Excel add-on to support your project management requirements.



CHAPTER 1

PROJECT MANAGEMENT IN JIRA AND CONFLUENCE

First, let's start by understanding why projects are managed in Jira and Confluence.



USING JIRA AND CONFLUENCE FOR PROJECT MANAGEMENT

Project management is such a critical part of daily work. It helps to fulfill various business needs, from something as simple as completing a task to something complex like deploying a new company-wide process.

Quick Info

According to Project Management Institute (PMI), "Project management is the use of specific knowledge, skills, tools and techniques to deliver something of value to people."

That's why companies globally are constantly looking to improve their project management practice. And what better way to do this than by deploying project management software? In fact, research found that the [remote task and project management tool market is expected to grow to USD 4.3billion by 2023 \(CAGR\)](#).

Enter Atlassian.

Atlassian products like [Jira and Confluence are agile solutions designed to transform project management for the better](#). Since these solutions are customizable and integrable with tons of third party Atlassian apps, they're perfect for managing different business needs and the corresponding projects.

Check out the section below to learn some of the benefits of using each tool to manage projects.

Pros of Using Jira for Project Management

- Plan long-term project initiatives.
- Complement project initiatives with actionable Jira issues.
- Track project status more diligently with Jira status.
- Personalize Jira to suit different types of users with varying expertise.

Pros of Using Confluence for Project Management

- Flesh out project scope collaboratively.
- Visualize and communicate project plans to stakeholders.
- Provide a transparent Single Source of Truth (SSoT).
- Convert action items in Confluence into Jira issues.

ARE JIRA AND CONFLUENCE ENOUGH TO MANAGE PROJECTS?

Though the benefits of Jira and Confluence are aplenty, there's still something lacking when it comes to managing projects using those two solutions. And that's the undeniable power of Microsoft Excel.

 **Quick Info**

There are an estimated half a billion Excel users worldwide, making it one of the best consumer products Microsoft has created.

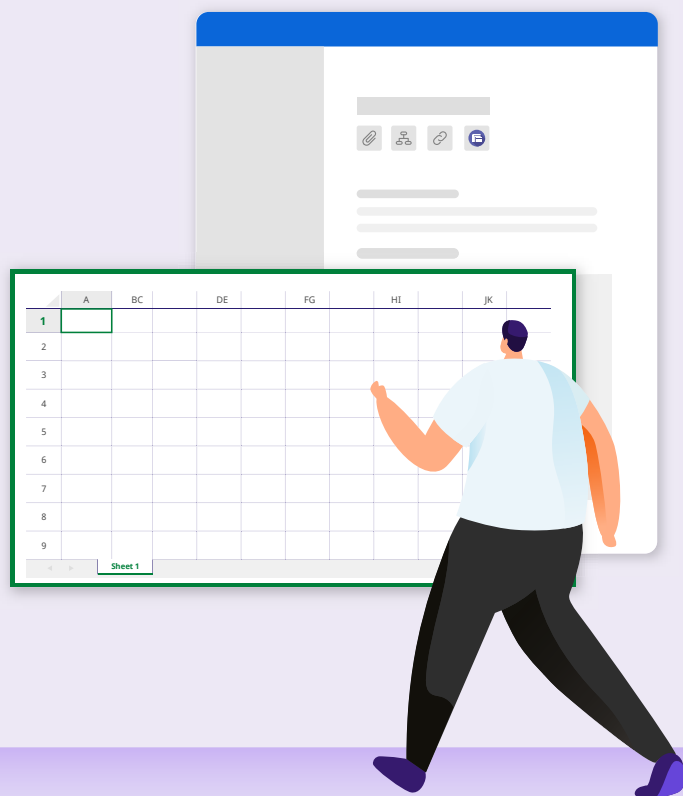
Excel is a spreadsheet program first released in 1985 with many robust data analyzing and reporting capabilities that are missing in Jira and Confluence. Thanks to these features, Excel can support various business functions and processes—from organizing inventory lists to projecting future sales number.

The same goes for project management too.

CHAPTER 2

HOW EXCEL CAPABILITIES SUPPORT JIRA AND CONFLUENCE PROJECTS

Next, discover how Excel can transform the way projects are managed on Jira and Confluence.



IMPORTANT EXCEL FEATURES TO HAVE IN JIRA

If you're already using Jira to manage projects, that's great! But you can ensure a **better** Jira project management process with the following Excel features.

In-Line and Bulk Edit Jira Issues

Currently, you can either edit Jira issues one by one through the issue detail view, or you must perform [Jira bulk operations](#) to edit more than one issue. And this process involves time-consuming additional steps and frustrating restrictions.

When you're busy managing projects and teams, you need an efficient way to ensure that project tasks and information are up-to-date. Remember how easy it is to edit data in multiple Excel rows and columns? Having this in-line and bulk editing feature ala Excel can make your [Jira project planning](#) process a lot smoother.



Scenario

Let's say that you're a product owner with a long list of issues in your Jira backlog. You need to [groom your backlog](#) to stage the next sprint cycle. Editing these issues individually is a waste of time. With in-line and bulk editing, you can quickly edit multiple Jira issues from one screen just like you would when you're editing multiple Excel rows and columns.

Excel-like Operations

There's a vast amount of data on Jira (e.g., user stories, points, blockers) that you can access to get a better understanding of your project progress and team performance. However, Jira makes it tricky for you to manipulate the way this issue data is presented.

You can either adjust the columns in the issue navigator or you would need to rely on [Jira Query Language \(JQL\)](#)—which can be difficult to master for newbies—to pinpoint specific data. Excel makes slicing and dicing data easy with features like freeze columns and sort and filter.

Powerful Excel Formulas

Unfortunately, Jira out-of-the-box doesn't offer any formulas or functions. Though you can create basic Jira tables to tabulate datasets, you can't use powerful formulas to analyze the dataset like you would in Excel.

Excel, on the other hand, is synonymous with formulas. To date, there are over 400 formulas in its Functions Library that range from simple mathematics (e.g., COUNT, SUM) to complex engineering functions (e.g., Bessel, Bitwise).

IMPORTANT EXCEL FEATURES TO HAVE IN JIRA



Scenario

Let's say that as a project manager, you need to keep track of a project budget spend. Keeping track of the numbers through a Jira issue table is feasible.

But if you have Excel formula features in Jira, not only can you monitor actual expenses throughout project execution, but you can also forecast future project budgets.

In-Depth Reporting Tools

One of the most important processes in project management is reporting. It helps you to assess team and project performance against objectives and how to improve them moving forward. In Jira, you can make use of [agile reports](#) like burndown charts to track progress towards sprint goals.

But did you know that Excel reports can perfectly complement Jira reports? This is because while Jira reports can give an agile view of a project's progress, Excel reports like Gantt charts can give the big picture view of a project.

Highly Visual Graphs and Charts

Related to the point above, you can leverage Jira for its graphs and charts. But remember that they're pretty basic and not customizable. In fact, you can't even create a bar chart in Jira out-of-the-box.

Besides the data analysis and reporting capabilities, Excel is also renowned for its highly visual graphs and charts. Having this Excel feature in Jira can help you clearly present project information to teams and stakeholders.

IMPORTANT EXCEL FEATURE TO HAVE IN CONFLUENCE

Confluence is a web-based corporate wiki that makes collaborating on mission-critical projects smooth. If you're already using Confluence, kudos to you!

Just remember that there's one powerful Excel capability—in addition to the ones listed above—that can transform your Confluence project management practice.

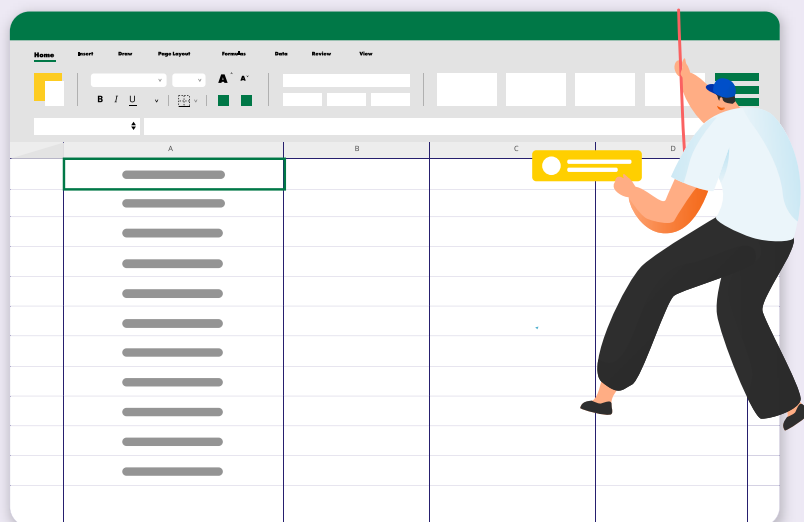
Ready-Made Templates

Though Confluence comes with [project management templates](#) to help you create and execute projects, the options are quite limited. Nothing beats the vast collection of Excel templates that you can directly download and incorporate into your projects.

CHAPTER 3

HOW TO CHOOSE THE RIGHT EXCEL ADD-ON FOR JIRA AND CONFLUENCE

Finally, learn what makes an Excel add-on the right fit for your Jira and Confluence instances.



REQUIREMENTS FOR AN ATlassian EXCEL APP

Remember that installing any Jira and Confluence Excel app won't do since there are different project management requirements to consider. So, when evaluating your Jira and Confluence Excel add-on, make sure it's built-in with the following capabilities:

Fits Specific Project Management Needs

First, always consider why you're installing an Excel add-on to your Jira and/or Confluence instances. Usually, you might have some project management needs that the two Atlassian out-of-the-box software can't support.



Scenario

For example, if you're a product owner who needs to quickly groom your Jira backlog, then go for a spreadsheet-like issue editor app. One that allows you to easily edit multiple Jira issues and get them ready to be worked on by your team members. Edits must also be reflected in Jira in real-time.

ID	Key	Summary	Assignee	Reporter	Priority	Status	Resolution	Created	Updated
10000	PROJ-1	Task A1	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10001	PROJ-2	Task A2	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10002	PROJ-3	Task A3	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10003	PROJ-4	Task A4	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10004	PROJ-5	Task A5	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10005	PROJ-6	Task A6	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10006	PROJ-7	Task A7	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10007	PROJ-8	Task A8	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10008	PROJ-9	Task A9	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10009	PROJ-10	Task A10	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10010	PROJ-11	Task A11	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10011	PROJ-12	Task A12	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10012	PROJ-13	Task A13	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10013	PROJ-14	Task A14	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10014	PROJ-15	Task A15	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10015	PROJ-16	Task A16	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10016	PROJ-17	Task A17	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10017	PROJ-18	Task A18	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10018	PROJ-19	Task A19	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10019	PROJ-20	Task A20	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10020	PROJ-21	Task A21	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10021	PROJ-22	Task A22	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10022	PROJ-23	Task A23	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10023	PROJ-24	Task A24	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10024	PROJ-25	Task A25	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10025	PROJ-26	Task A26	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10026	PROJ-27	Task A27	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10027	PROJ-28	Task A28	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10028	PROJ-29	Task A29	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10029	PROJ-30	Task A30	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10030	PROJ-31	Task A31	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10031	PROJ-32	Task A32	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10032	PROJ-33	Task A33	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
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10034	PROJ-35	Task A35	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10035	PROJ-36	Task A36	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10036	PROJ-37	Task A37	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10037	PROJ-38	Task A38	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10038	PROJ-39	Task A39	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10039	PROJ-40	Task A40	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10040	PROJ-41	Task A41	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10041	PROJ-42	Task A42	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10042	PROJ-43	Task A43	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10043	PROJ-44	Task A44	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10044	PROJ-45	Task A45	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10045	PROJ-46	Task A46	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10046	PROJ-47	Task A47	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10047	PROJ-48	Task A48	Unassigned	Thomson	Low	Done		08/01/20	08/01/20
10048	PROJ-49	Task A49	Unassigned	Thomson	High	To Do		08/01/20	08/01/20
10049	PROJ-50	Task A50	Unassigned	Thomson	Medium	In Progress		08/01/20	08/01/20
10050	PROJ-51	Task A51	Unassigned	Thomson	Low	Done		08/01/20	08/01/20

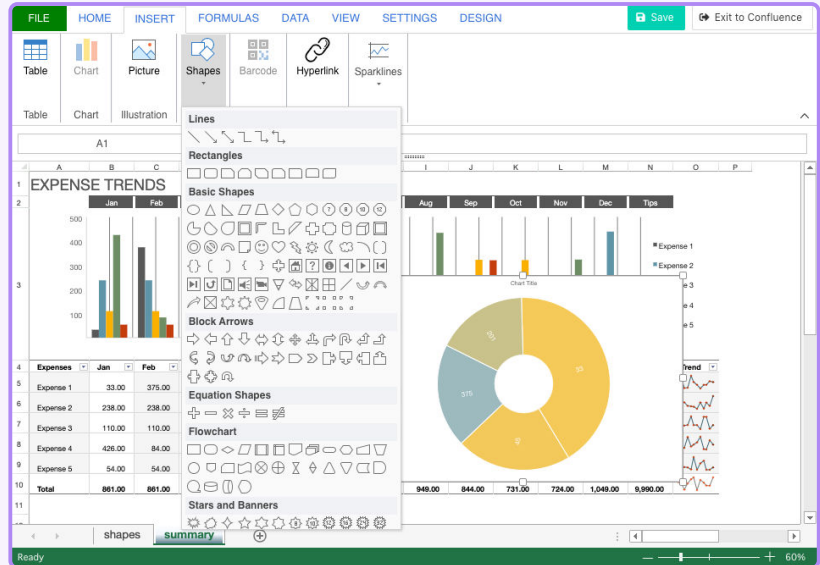
It's easy to in-line and bulk edit multiple Jira issues when they're all displayed in a single spreadsheet app like Excel-like Issue Editor for Jira.

REQUIREMENTS FOR AN ATlassian EXCEL APP



Scenario

Alternatively, if you're a project manager who needs to visualize project progress to stakeholders, then your best bet is a spreadsheet add-on with powerful data visualization capabilities.



Choose an Atlassian Excel app with robust data visualization as this helps to clearly communicate project progress. Shown above is Excel-like Tables for Confluence.

Single Source of Truth (SSoT)

If possible, avoid installing spreadsheet apps that require time-consuming repeated sign-ins and authentications. This usually happens if the app needs permission to access spreadsheet files hosted in external locations like Microsoft Office 365 or Google Drive. Currently, you can either attach Excel files or links to externally hosted Excel files in Jira issues and Confluence pages, which doesn't support an SSoT environment.

So, select an app that's seamlessly integrated into every Jira issue and Confluence page. This means that you don't have to create Excel files separately in external folders. All your important project data will then be stored in a single SSoT.

Quick Import/Export

Next, choose an Atlassian Excel app that allows your project data to be quickly imported or exported in Excel or CSV formats. The app should easily transfer project data from an Excel file into a Jira issue or Confluence page without any errors. Such a feature will help you build a project management platform with an SSoT.

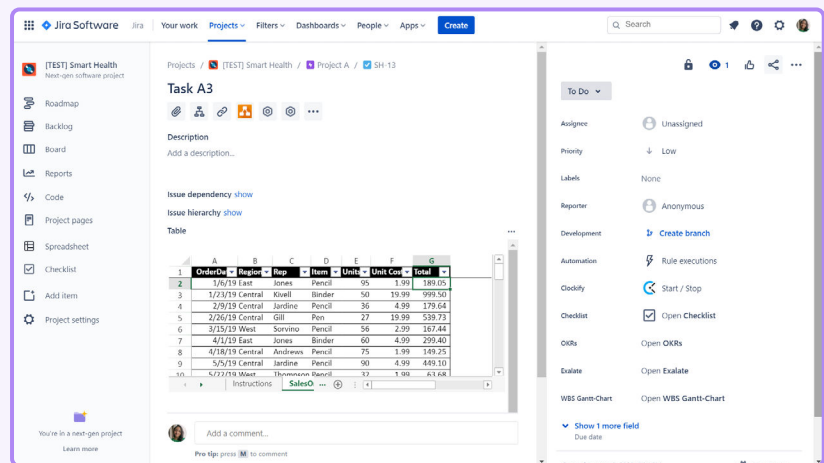
REQUIREMENTS FOR AN ATLISSIAN EXCEL APP

Not only that, once the project data is stored in a Jira or Confluence instance, you must also be able to analyze, report, and visualize it using Excel-like operations. Other import/export file formats like JSON and PDF can also facilitate your project collaboration process.

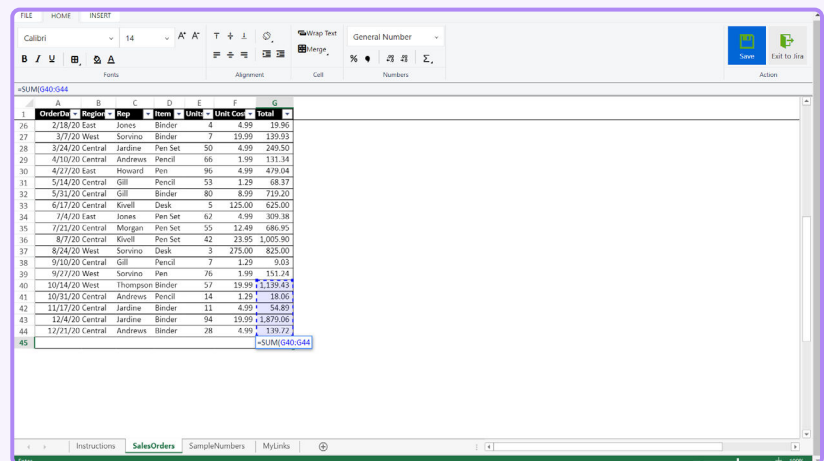
Scenario

Let's say that instead of using the Jira table, you're actually tracking your project budget spend in a separate Excel file. However, having a separate file stored in a cloud drive or even on your desktop can be confusing.

A good workaround to this is to import the data from the file directly into the relevant Jira issue or Confluence page and then continuously edit it using various Excel-like functions.



The right Atlassian Excel app should allow you to firstly, import the Excel data directly into a Jira issue.



And then the app should allow you to edit the data using different Excel-like features. Achieve this using Excel-like Tables for Jira.

REQUIREMENTS FOR AN ATLASSIAN EXCEL APP

Supports JQL and CQL

If you're not a Jira or Confluence newbie, then you're probably familiar with and can use JQL and [Confluence Query Language \(CQL\)](#) to look for relevant information. So, it helps if the project data in your Excel app can be retrieved through JQL and CQL. Ideally, you'd want your project data to be stored in a single platform that can be accessed immediately.

Dynamic Data Analysis, Reporting, and Visualization

Feature parity between Microsoft Excel and your chosen Atlassian Excel add-on is critical. It enables you to take advantage of most—if not all—of the Excel data analysis, reporting, and visualization features. Make sure that the Atlassian Excel app has advanced features like formulas, formatting, graphs, charts.

CONCLUSION

That's all, folks!

It should be clear by now that the Excel-like capabilities are instrumental for successful project management in Jira and Confluence. The key is to choose the right Atlassian Excel add-on that fulfills your project management requirements.

Quick Info

Ricksoft is an Atlassian Marketplace Gold Partner that specializes in creating project management apps with advanced Excel-like capabilities.

Excel-like Issue Editor for Jira and **Excel-like Tables for Jira** are two Jira Excel apps designed to bring the power of Excel into Jira. Together, these solutions supercharge various aspects of project management, from grooming Jira backlogs to delivering the full Excel experience to each Jira issue.

Excel-like Tables for Confluence is the app that can complement Confluence and its knowledge management features with full Excel operations.

Ready to leverage the power of Excel in your Jira and Confluence instances?

- > [Try Excel-like Issue Editor for Jira](#)
- > [Try Excel-like Tables for Jira](#)
- > [Try Excel-like Tables for Confluence](#)





**EXCEL-LIKE ISSUE
EDITOR FOR JIRA**



**EXCEL-LIKE TABLES
FOR JIRA**



**EXCEL-LIKE TABLES
FOR CONFLUENCE**



**WBS GANTT-CHART
FOR JIRA**