

# Sprint-to-Jira AI Agent – User Manual

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## 1. Executive Summary

The Sprint-to-Jira AI Agent is an enterprise automation solution designed to streamline the project management lifecycle. By converting unstructured sprint planning discussions into structured Jira work items, it significantly reduces manual administrative effort.

The solution utilizes an Agent Driven Tool Framework, incorporating Human-in-the-Loop verification to ensure accuracy before execution, and integrates seamlessly with Jira Cloud and Microsoft Outlook.

## 2. Solution Overview

The system operates as a two-stage intelligent process: 1. Sprint Planner Agent: Interacts with the user to refine and finalize the sprint plan. 2. Plan2Jira AI Agent: Takes the approved plan and executes the necessary actions in Jira and Outlook.

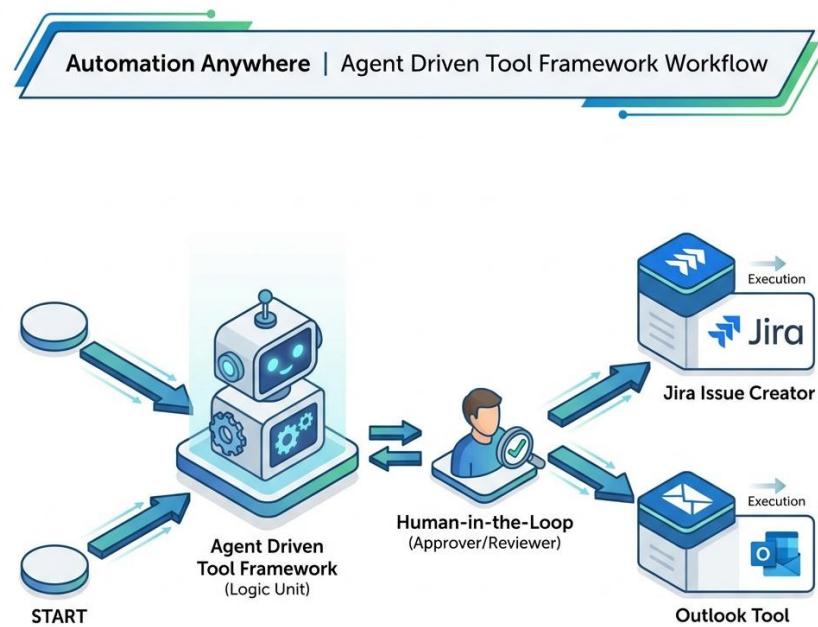


Figure 1: High-Level Solution Overview

## Key Benefits

- **Structured Planning:** Dedicated agent ensures the plan is solid before execution.
- **Efficiency:** Automates repetitive ticket creation.
- **Accuracy:** AI converts natural language to strict API-compliant formats.
- **Control:** User explicitly reviews and approves the plan in the UI.
- **Visibility:** Stakeholders receive immediate summaries via Outlook.

## 3. System Architecture

The architecture divides the responsibility into Planning and Execution phases.

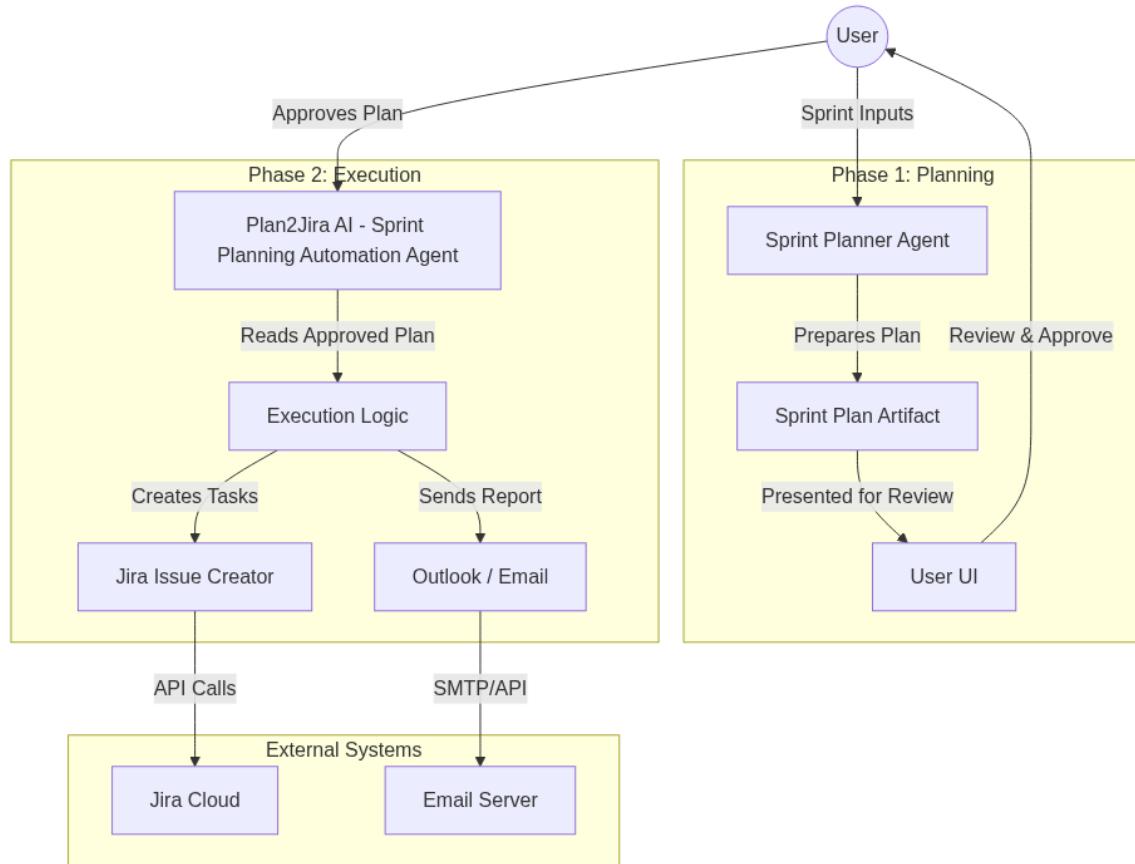


Figure 2: Technical System Architecture

## Core Components

### 1. Sprint Planner Agent

The initial interaction point. It processes user inputs (goals, notes) and structures them into a sprint plan.

### 2. Co-Pilot Form (Approval Step)

The interface where the user reviews the generated plan. Allows for "Review" and "Approve" actions.

### 3. Plan2Jira AI (Sprint Planning Automation Agent)

The execution engine. It is triggered only after the plan is approved. It iterates through the plan items to create specific Jira issues (Epics, Stories, Tasks).

### 4. Tools

Jira Issue Creator: Handles API authentication and data transmission to Atlassian.

Outlook / Email Tool: Sends summary reports or exception notifications.

## 4. Process Flow

The following sequence diagram details the interaction between the User, the two Agents, and external systems.

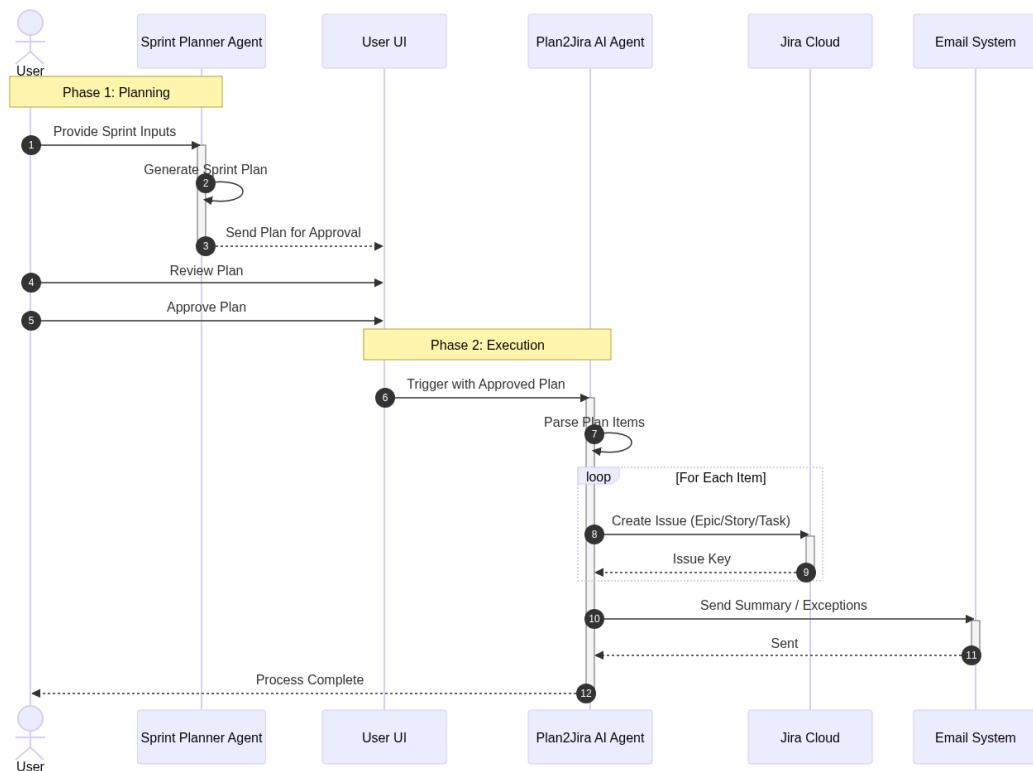


Figure 3: End-to-End Sequence Flow

## Step-by-Step Workflow

1. Planning Phase: User provides sprint goals/notes to the Sprint Planner Agent. Agent analyzes inputs and creates a Sprint Plan Artifact. The plan is presented in the Co-Pilot Form.
2. Approval Phase: User reviews the plan items. User clicks "Approve".
3. Execution Phase: The Plan2Jira AI Agent reads the approved plan. It loops through each item and calls the Jira Issue Creator to post data to Jira Cloud. Jira returns the new Issue Keys.
4. Completion: The agent compiles a summary report. Sends an email via Outlook to the user/stakeholders.

## 5. Setup & Configuration

### 5.1 Prerequisites

- Automation Anywhere Control Room access.
- Jira Cloud account with "Create Issues" permission.
- Microsoft Outlook client or API access.

### 5.2 Jira Authentication

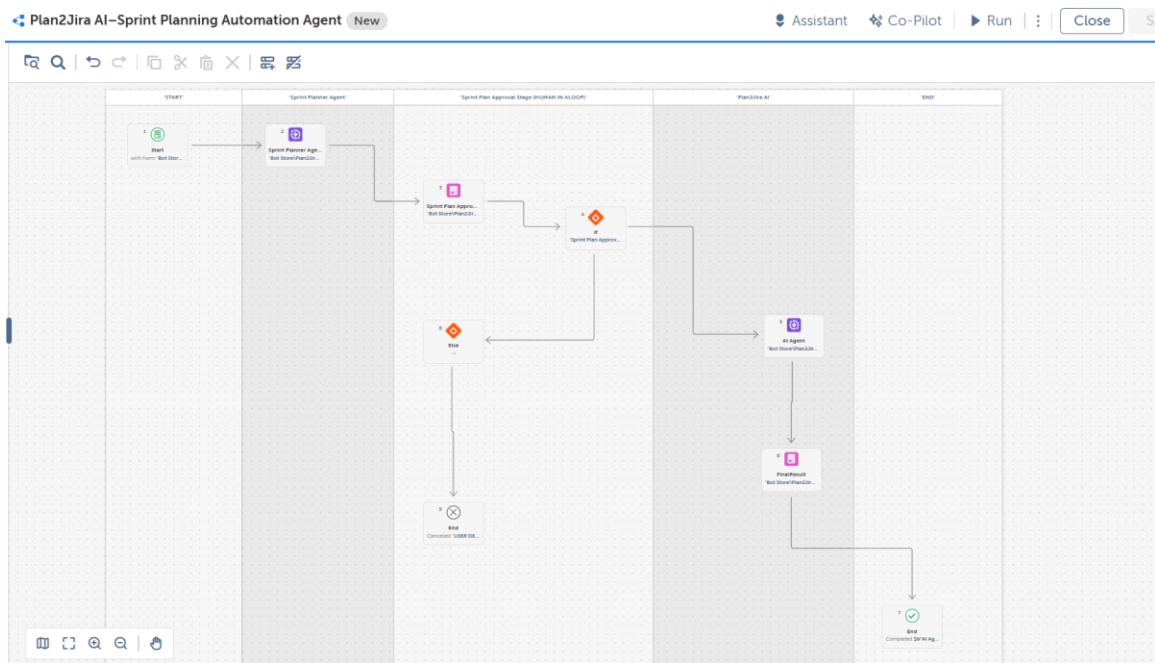
Jira Cloud uses Basic Authentication with an API Token.

5. Go to Atlassian Account Settings (Security -> API Tokens).
6. Create a new API Token.
7. Important: Do not use your login password.
8. Function format: Base64(UserEmail:ApiToken).

### 5.3 Outlook Configuration

Ensure the bot runner machine has a configured Outlook profile, OR Configure the "Email: Send" command with SMTP server details in the Agent settings.

## 6. Usage Guide



BOTS :

Type	Name	Folder path	Status
Folder	Tools	Bot Store\Plan2Jira AI - Sprint Planning Automation Agent	N/A
Process	Plan2Jira AI-Sprint Planning Automation Agent	Bot Store\Plan2Jira AI - Sprint Planning Automation Agent	New
AI Agent	Plan2Jira AI - Sprint Planning Automation Agent	Bot Store\Plan2Jira AI - Sprint Planning Automation Agent	New
AI Agent	Sprint Planner Agent	Bot Store\Plan2Jira AI - Sprint Planning Automation Agent	New

## HOW TO EXECUTE :

Step 01 : Execute Plan2Jira AI-Sprint Planning Automation Agent Process Flow

Step 02 : Fill the information in Co-Pilot Form and Submit ( ADD JIRA URL AND JITA TOKEN)

Step 03 : Wait for the Bot Magic.

Step 04 : Once Bot completed you will receive an email confirmation as well as Co-Pilot form.

### 7. Troubleshooting

Issue	Probable Cause	Solution
401 Unauthorized	Invalid Jira Token or Email	Regenerate API Token and check Base64 encoding.
403 Forbidden	Lack of Permissions	Request "Create Issue" access for your project in Jira.
Email Not Sent	Outlook blocked/closed	Ensure Outlook is open or SMTP is allowed on port 587.