

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.

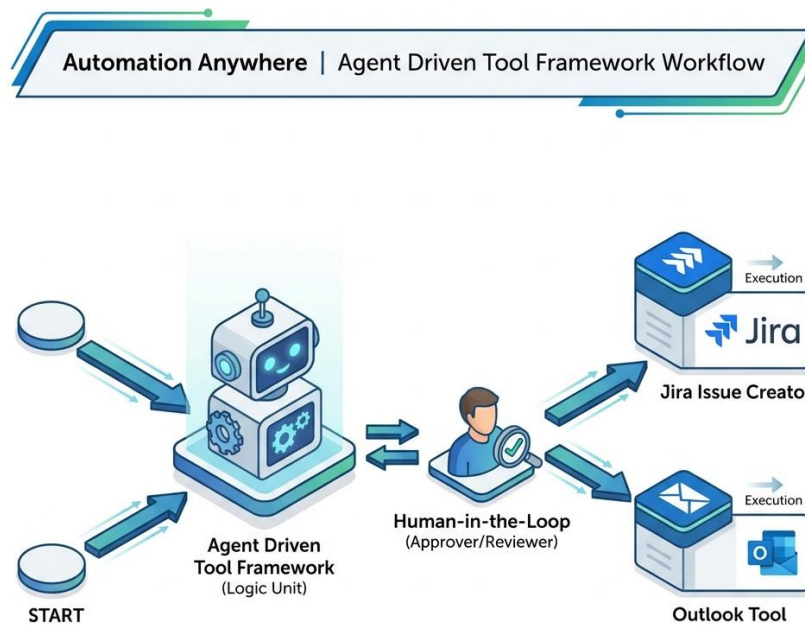


Figure 1: High-Level Solution Overview

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.

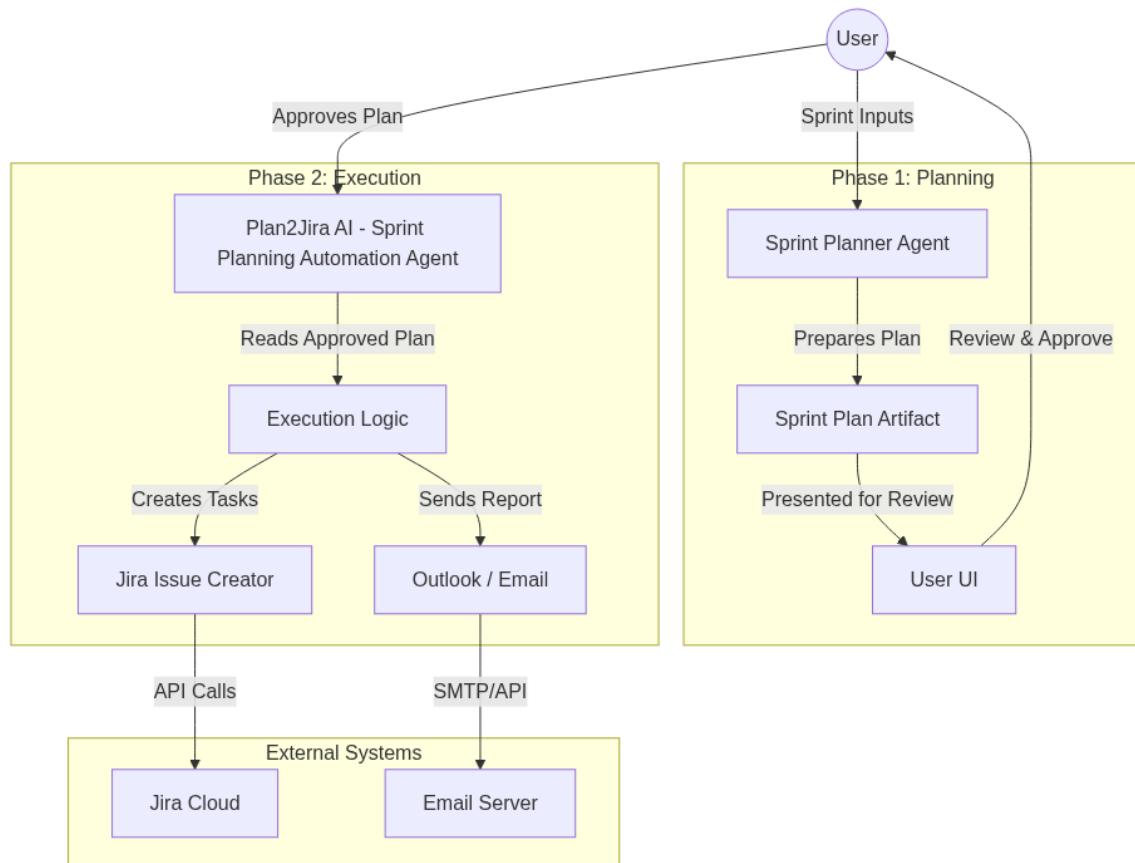


Figure 2: Technical System Architecture

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.

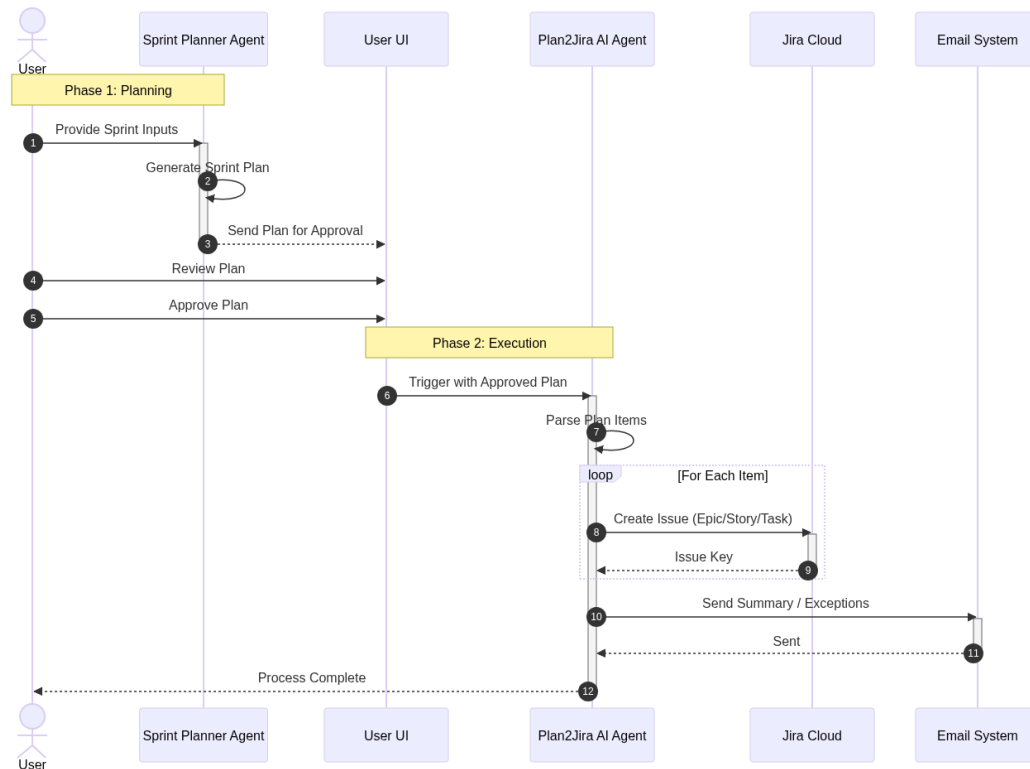


Figure 3: End-to-End Sequence Flow

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.

The screenshot displays the Plan2Jira AI - Sprint Planning Automation Agent interface. At the top, there's a header bar with the title "Plan2Jira AI - Sprint Planning Automation Agent" and a "New" button. To the right, there are navigation icons for Assistant, Co-Pilot, Run, and a Close button. Below the header is a toolbar with various icons for editing the workflow. The main area shows a workflow diagram with the following steps:

- START**: Step 1, "Start with Form: 'Sprint Plan...'" (Green circle icon).
- Sprint Planner Agent**: Step 2, "Sprint Planner Agent: 'Sprint Plan...'" (Purple square icon).
- Sprint Plan Approver (Stage 1: HUMAN IN A LOOP)**:
 - Step 3, "Sprint Plan Approver: 'Sprint Plan...'" (Pink square icon).
 - Step 4, "Sprint Plan Approver: 'Sprint Plan...'" (Orange diamond icon).
 - Step 5, "End" (Orange diamond icon).
 - Step 6, "End" (Orange diamond icon).
- Plan2Jira AI**:
 - Step 7, "AI Agent: 'Sprint Plan...'" (Blue square icon).
 - Step 8, "Final Review: 'Sprint Plan...'" (Pink square icon).
- END**: Step 9, "End: 'Completed Sprint Planning...'" (Green circle icon).

The workflow is divided into sections: START, Sprint Planner Agent, Sprint Plan Approver (Stage 1: HUMAN IN A LOOP), Plan2Jira AI, and END. The AI Agent step is highlighted in blue. The interface also includes a sidebar on the left with a list of agents and a bottom toolbar with icons for editing the workflow.

Automation

+ Create

Manage

Public

Private

Bot Store

Private bots and files cannot be viewed by other people. If a bot or file has been checked out from the Public tab, it can be viewed and run by other people, but cannot be edited.

Folders

> Bots

> Bot Store

> Plan2Jira AI ...

> SmartRoute AI ...

☒ Search within subfolders

Name

Search

Files and folders (4)

	Type	Name	Folder path	Status
<input type="checkbox"/>	Folder	Tools	Bot Store\Plan2Jira AI – Sprint Planning Automation Agent	N/A
<input type="checkbox"/>	Process	Plan2Jira AI-Sprint Planning Automation Agent	Bot Store\Plan2Jira AI – Sprint Planning Automation Agent	New
<input type="checkbox"/>	AI Agent	Plan2Jira AI – Sprint Planning Automation Agent	Bot Store\Plan2Jira AI – Sprint Planning Automation Agent	New
<input type="checkbox"/>	AI Agent	Sprint Planner Agent	Bot Store\Plan2Jira AI – Sprint Planning Automation Agent	New

100 per page

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 JIRA 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.