

Getting Started in Jira



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Section 1 – Course Introduction

Video: Course Introduction

Dan: Hello, and welcome to this getting started in JIRA course. My name is Dan LeFebvre, and I've consulted and developed processes, standards and workflows for organizations around the world that are using JIRA for project management.

Today, we're going to uncover the key features that you need to know to master JIRA's powerful capabilities. We'll start by learning some of the terms and concepts that we're going to find inside of JIRA. From there we'll get familiar with JIRA's team managed projects before hopping into the company managed projects in JIRA. And, of course, we'll also learn the differences between team and company-managed projects, so you'll know when it's best to use one over the other.

Finally, we'll wrap up this course learning how to customize JIRA for our team using its administrative backend. Now, we've got a ton to cover throughout this course. So let's kick things off in our next video by getting familiar with some of the different versions of JIRA that are available, as well as which version we'll be working in today. See you there.

Video: Versions of JIRA

Dan: Throughout this course, you may notice the version of JIRA I'm using might look a little different than the one you're using. That's because there are multiple versions of JIRA out there. Fortunately, no matter what version of JIRA you're using, the core concepts that we'll be covering throughout this course are applicable to you. There just might be some slight differences in the features available depending on which version you have.

So in this video, we'll look at some of the different versions of JIRA that are out there, as well as which version I'll be using throughout this course. So these are the different versions of JIRA. And really, what these are determines the features that you have available to you. Think of it sort of like how you can get the same model car, but you can get a two door version, a sport version, four door version, maybe a hatchback version.

There are different options available for the same model car, it's really the same core engine driving it, there are just some different features available. So JIRA Software is the flagship version of JIRA. It is the issue tracking and agile project management tool for software developers. In my experience, when someone refers to JIRA, or says that they're using JIRA, nine times out of 10, what they're really referring to is JIRA Software.

Then we have JIRA Align. So every version of JIRA is going to be more corporate-focused, then something like Trello, which is another product from Atlassian, the same company behind JIRA. JIRA Align though is really designed to go beyond what JIRA Software can do and scale up to handle things like financial allocations across different teams, letting different teams use different process frameworks or even letting you build out your own processes. It really is JIRA at an enterprise scale.

Now, another version of JIRA is JIRA Work Management. This version offers some features that aren't really as software development-focused, but are more general office type project management. There are lists and calendars that Atlassian targets non-development teams like marketing, HR, and so on.

Next, we have JIRA Service Management used to be called JIRA Service Desk. Think of a help-desk type scenario where you need customers to be able to access frequently asked questions or FAQs, a knowledge base, the ability to submit service requests tickets, and then being able to track those on the backend, tracking assets and things like that. That's where Service Management can really help.

So for this course, we're going to be using JIRA Software. As I mentioned earlier, nine times out of 10 when somebody says they're using JIRA, what they mean is JIRA Software. There is a little asterisk to this, I want to make sure I point out that I am not going to be using JIRA Software Premium. There is a premium version of JIRA Software costs a little bit more and it's going to give you some more things like advanced roadmaps, unlimited storage for attachments, IP allow listing and so on. You still have attachments in JIRA Software Standard, which is what I'm going to be using in this course, you just don't have unlimited storage, so things like that.

And that brings us to JIRA's licenses. There are essentially two ways to license JIRA. Either you buy a license to JIRA and install it on your own server, that's called JIRA Server. And there are pros and cons to this. On JIRA Server, since it's on your server, you can customize it a lot more than you can with the other versions of JIRA, we'll get to in a minute. Of course, customizing it, as new versions of JIRA come out. If you make customizations that could break with those updates, so it can get pretty involved. You may need some developers on staff in order to maintain the installation of JIRA itself.

So if you're a smaller team and don't have the resources to keep up with the updates, then you can get JIRA Cloud as a subscription. One of the key benefits to Cloud is that Atlassian manages the backend completely, and they keep it up to date with the latest version automatically for you.

In this course, we will be using JIRA Software on Cloud. But no matter what version of JIRA you're using, again, the core concepts that we're going to learn in this course, are essentially the same, you just might have some different features. For example, if you are using JIRA Server, and your administrator hasn't updated it to the latest version, then of course, you're not going to have some of those newer features that are in JIRA Software on Cloud.

Speaking of features, one great thing about JIRA is how many plugins and apps they have available to really extend its features beyond the core functionality. But, those come at an extra cost. So, for this course, I will not be using any third party apps from the Atlassian marketplace. I'll only be using the core functionality that comes with the license of JIRA Software on Cloud.

Okay, so that wraps up this section. When you're ready, I will see you in the next section, where we'll start to unpack some of the key terms and concepts you need to know before we dive into JIRA. See you there.

Section 2 – What Is JIRA?

Video: What Is JIRA?

Dan: In this video, we'll take a couple minutes to understand exactly what JIRA is and what it's used for. Simply put, JIRA is a project management and issue-tracking tool. As a fun little fact, the name JIRA actually comes from Gojira, the Japanese name for Godzilla.

Now, there are a lot of different ways that companies organize their Projects; Waterfall, Six Sigma, Prints too, and so on. Some of these methodologies or ways of organizing and getting work done are similar to each other. Some of them are quite different from each other. Overall, the methodology that a company uses to organize and get work done can determine the tool that they use to organize all of that.

When you're using JIRA, it will assume that your team is using the Agile methodology. Now I've worked with teams who are using JIRA and they're not using the Agile methodology. There are apps and plugins that you can get in order to have JIRA organize things in a different way. But by default, without any extended capabilities, JIRA itself is an Agile tool. This course is not really designed to be a deep dive into Agile methodology.

But there are a lot of Agile terms and concepts that will come across inside of JIRA. So that's why it's important to take the time to understand some of those core Agile terms and concepts. Now if you're already familiar with Agile, then great, you can skip over the next few videos. But if you're new to Agile or if you just want a quick refresher, then I'll see you in our next video, where we'll get a crash course on the basics of Agile methodology.

Video: Basics of Agile Methodology

Dan: In this video, we'll get an overview of Agile methodology. Now before we begin, I want to point out that this is not going to be an in depth look at Agile. There are tons of great courses and workshops out there that do take a deep dive into Agile methodology. But if we were to try to do that in this course, there wouldn't be any time left over for JIRA.

As we learned in an earlier video though, before we can understand how JIRA works, there are some things about how Agile works that we need to understand first, because JIRA just assumes that we already know them. So that's the purpose of this video; to give a crash course on Agile in a single video. For our purposes today, the term Agile refers to a methodology that software development teams around the world use to get stuff done.

It's a methodology that promotes adaptive planning, evolutionary development, early delivery, continuous improvement, and encourages rapid and flexible response to change. Now, JIRA certainly is not the only Agile tool out there, there are quite a few of them. In fact, I've worked with teams that prefer to use a simple whiteboard on the wall in the office with something like post-it notes instead of using a digital tool at all. But of course, physical whiteboards won't work for everyone. There is no right or wrong tool when it comes to Agile, it's more about what's right for your team, or your organization.

With that in mind, JIRA is something that some of the world's largest companies and organizations are using for their Agile workflows. Because for a lot of teams, it is a lot easier to see things using a digital tool like JIRA. To organize our work using Agile methodology, one of the most important tools that we'll use is an Agile board. And that begs the question, what is an Agile board?

On an Agile board, we'll have different columns. In Agile, sometimes they're called Lanes, in JIRA, they're called Columns. Think of these as the steps you need to get a project done. In the simplest project, there's going to be at least three columns To Do or Not Started, so the project hasn't even been started yet. In Progress, it's currently being worked on, and Done, it's complete. Of course, Boards can get even more complex than that. And in JIRA, you can customize it to add in whatever sort of columns that you want. But this is just a simple example of an Agile board.

Now, underneath Agile, there are two primary ways to organize Projects. There are different workflows for how your team tackles those Projects and the process that they use to get them done. One is called Scrum, and the other is Kanban. The differences between these could be an entire course in and of itself. But for our purposes today, there's really one key difference to keep in mind. And that difference has to do with something called a Sprint. And, again, that begs the question, you can start to see why some of these concepts that we're going to see inside of JIRA doesn't really explain them. So what is a sprint?

Well, a sprint is a predetermined amount of time where teams determine what work is going to get done in that time. That might be easier. Let's walk through an example of this just to explain.

So let's say our team has decided we're going to work with a two-week sprint. So, that means, every two weeks, our team is going to hold a sprint meeting. In that sprint meeting, might look something like this, start by discussing the last sprint. A lot of teams that I work with, they prefer to go around each individual team member and go around and say, what went well for you in the last sprint? What didn't go well for you in the last sprint? Are there any roadblocks that you came across or things that we can try to work better? This goes back to that iterative and continuous improvement. What can we do better in the next sprint?

And then as a team, discuss and agree on the work. Again, usually, teams that I've worked with, they'll go around individually each team member, discuss and agree the work that's going to be completed in the next sprint, what's the highest priority thing to do in the next two weeks. Then, day-to-day workflow, we'll be taking those Projects. So let's say these are the three things that I need to get done in the next sprint.

And again, if there's a priority level to these, then of course, that will be something that will be discussed in the sprint meeting. If there's not then it'll be up to me to determine which ones of these I need to get done. We just know that we need to get these three things done in the next two weeks.

So the process for this is to take a single ticket and drag it all the way from left to right before you bring another one on. You don't want to have multiple things in progress, if you can help it. You take one all the way over to completion until they're all done. Then after another two weeks, you're gonna hold another sprint meeting. And in that sprint meeting, just like the last one, it's going to go around and say, what went well? Were you able to get all the tickets across the board? If not, what sort of roadblocks did you come across that kept you from being able to complete all of those things that we had said needed to get done?

What can we do better to make sure that we're able to hit those in the future? Or is there better communication between teams? And as a team leader, it's really helpful to hear some of these roadblocks that your team is having to be able to fix those so that more work can be done. And then again, discuss and agree the works that are going to be completed in the next sprint and keep going.

Now, with that said, not every team works best with these blocks of time for their project with these Sprints. Sometimes it might be better for your team to work on Projects on an ongoing basis. And that is where Kanban comes into play. So in a Kanban workflow, the board may look very similar, but the workflow is going to be different. Where you take your ticket and you drag it over again, you're still going to try to get that all the way to completion if you can.

But as you're working on things, new Issues, new tickets may be added to the board at any given time. Because with Kanban, it's more of an ongoing thing. You're working on a project on an ongoing basis. Okay, so to recap, we have the Agile methodology that's made up of two primary ways to organize and get in the process for getting our Projects completed.

One is Scrum, which has a sprint where your team will sit down and figure out all the Projects that your team needs to get done in that predetermined amount of time. Then there's Kanban,

where there aren't sprints, but your team works on Projects on an ongoing basis. And as I mentioned at the beginning of this video, there's a ton more depth that we could go into when it comes to Agile. But, we're ready now to move on to some of the key Agile terms that we'll find inside of JIRA and we'll learn more about those in our next video.

Video: Key Agile Terms you'll Find in JIRA

Dan: In this video, we'll look at a couple of Agile terms that we'll come across a lot in JIRA; Stories and Epics. So this is a screenshot of what it looks like when we create a new issue in JIRA. And this screenshot right here is one of the most common reasons why I get this question from folks who are new to JIRA. Why does this say story? What this is referring to is a concept inside of Agile methodology called User Stories.

So a User Story has a formula that goes something like this; as a blank type of user, I want blank, some sort of goal. So that blank, some sort of reason. Here's an example. As a web developer, I want to be able to add users to JIRA, so that my coworkers can report bugs. Or another example would be as a driver, I want my car's Dashboard to be voice activated, so that I can get directions safely while driving. Or, as a cashier, I want to have the total calculated for me so that I can give the correct change back to the customer. These are just examples. Not all User Stories have to be done exactly like that. But you can see the wide variety here, kind of using that same formula.

Generally speaking, User Stories, and Agile are how developers around the world break up their work. You'll notice that there's no technology mentioned. It's done this way specifically to leave all the technical stuff out of it, that doesn't matter. The person driving the car here just wants to be able to get directions safely while they're driving. They don't care how you get the GPS to be voice activated, they just want it to work. As a developer, figuring out the technical stuff to achieve that goal is your job.

That brings us to Epics. So probably the easiest way to think of epics is like a big, massive, well, epic-sized story. Not every story needs to live inside an epic. But, if you have something especially if you're using Scrum where you're working with sprints like the example on our last video where we have a two-week sprint. If we're working on something that's going to take longer than two weeks to get done, then that's going to be an epic, and we want to break that down to smaller Projects, essentially into smaller User Stories that can be tracked in the epic.

So the hierarchy can look something like this, where you have multiple stories, all linked to that epic. So here's an example. Let's say the epic is the core functionality for note taking app say that we're building. Probably not going to be able to get that done in a single sprint. But here are a few stories that we may be able to get done in a single sprint. So we can work on one of those and then the next sprint we can work on another and we can start to see as we track the epic, have those stories linked to it, being able to track the overall progress in the epic. It's a really great way of being able to break down big epic Projects in to small ones to get them done.

Okay, so to recap, when you see stories in JIRA, it's referring to User Stories. And epics in JIRA contain multiple User Stories, or other issue types as well. But we'll get to that later on in this course. I should probably mention, if you're using JIRA for more than your dev team, stories don't really have to be written out that way every time. Because JIRA is created as a dev tool, stories are basically the default method of organizing your Projects inside of JIRA.

Now, I've worked with marketing teams and graphics teams that all use JIRA Software, and they just use stories as whatever project they need to get done in their sprints. But that probably raises another question because User Stories and epics sure sound a lot like the Projects that you need to get done at work. And I've even mentioned that, you know, they're the Projects that you need to get done. And they are, but JIRA also has Projects too.

So what are those because that's a different thing. That's exactly the sort of thing that can make JIRA so confusing when you first jump into it. So now that we're familiar with what stories and epics are, let's clarify some JIRA terminology by moving on to our next video, where we'll learn about some JIRA terms we need to know.

Video: JIRA Terms you need to know

Dan: In this video, we'll look at a couple more terms we'll see in JIRA; Issues and Projects. Now, at first, these terms seem very straightforward. We all know what Issues are, and we all know what Projects are. But what does JIRA mean when it's using these terms, because it might not be what you think. Let's start with Issues.

Issues are the heart of what you'll be tracking in JIRA. Issues are containers for fields, and fields hold all of your data. So things like the description, the summary, who it's assigned to, a due date, attachments, comments, all of those things are fields on Issues. One of my favorite ways to explain Issues is to think of them like post-it notes.

The note itself is really just an empty container, you can put any sort of information that you want on it. You can even color coordinate your notes to help organize that information better. Just like inside of JIRA, you can have different issue types. Now, you can also have custom issue types, but it does come with some pre-installed like stories and epics, like we learned about in the last video.

Maybe on the story-issue type, you want to have the summary, description, and due date, maybe on the bug-issue type, you also want to have the OS or the operating system, so it's easier to know where that bug took place so it can be fixed easier. All of this is customizable of course, it kind of depends on what sort of data you need to track. But you can start to get a sense for what JIRA means when it's talking about Issues and how you can have different fields on different Issues. And that brings us to Projects.

Now, as I mentioned earlier in this course, Projects in JIRA probably aren't really what you think of when you think of a project. By that what I mean is when you start a new project at work, that does not necessarily mean you're going to start a new project in JIRA to track it. So let's go back to our example of the post-it notes here. We have these different Projects, all of the Issues in the top row are in the web dev project, all the Issues in the middle row or in the marketing project on Issues in the bottom row are in the customer service project. Those Issues actually live-in side of the project. And in the project settings is where you can tell JIRA what types of Issues will live in there, right?

And of course, as we learned, the Issues contain the data and contain different types of fields. So let's say in the web dev project, we want to be able to have bugs, so we can track those in there. But the marketing project doesn't need bugs. So we're going to hide that from them, we're not even gonna show them bugs, because they don't need to see that. You can start to get a sense for how you can customize this to fit your organization's needs so they can see the information, they can track the information that they need, and anything else that just would end up being clutter and hinder productivity, they don't even need to see.

Okay, so to recap, as we learned Issues are things like stories, epics, bugs, those are types of Issues in JIRA. And of course, you can create your own custom-issue types as well if you don't want to, or if you want to add to the ones that are the prebuilt ones that come with JIRA. Issues

JIRA

hold the fields that contain your data. Now Projects are where the Issues live inside of JIRA and you're not necessarily going to be creating a bunch of Projects all the time. Okay, so now that we have a good understanding of some key concepts, let's actually hop into JIRA. So we'll do that in the next video.

Video: Getting Familiar with JIRA's Interface

Dan: In this video, we'll start getting familiar with JIRA by looking at its interface. Now when you first log in by default, JIRA will send you to this area called Your work. Right now, you can see there's not really a lot here, because we haven't done a lot of work in JIRA yet. But as we continue throughout this course, we'll see things like the recent Projects that we visit will show up here, items that we've worked on, Issues that we've worked on, Issues that we've viewed, or things that we viewed here, Issues that are assigned to us, or any items that we've starred or favorited, bookmarked, same sort of concept.

But for now, let's get an understanding what we're looking at here and start by moving from up at the top left-hand side. So this is the app switcher. And in here, we can switch between the different Atlassian products that we have. So you can see if we had Confluence, which is Atlassian wiki tool for documentation, knowledge base, things like that. If we had that, then we would see that actually right here, or we could start a trial if we wanted to. Of course, the key thing to keep in mind here is starting the trial or actually subscribing to this. Since I'm using JIRA Software on Cloud, that would be another subscription.

So in order to do that, we would actually have to have administrative permissions, which means access to the billing information as well to be able to set that up. Or down here at the bottom, actually if we have administrative permissions, we can customize this. So you may see some different things just adding in different links. I've worked with teams that add links to a different intranet or specific documentation website, things like that. Just a quick way to link that and being able to see that up here very, very quickly directly inside of JIRA.

Next to that, we have the JIRA logo here. Depending on your organization, this may be your company's logo, the JIRA administrator has the ability to customize this. But by default, when you click on this, it's going to take you right back to Your work, where we were when we first logged in. So at any point, if you get lost in JIRA, you can click on the logo up here, and it will take you back home. After that, again, we have Your work. But here we have quick access in the menu to some of the things that we would see on this page.

But as we're working in JIRA, sometimes it's faster to not have to navigate to this page fully. So we can see the recent things that we viewed, you can see some recent Dashboards or Filters that we viewed, we can go to the Your work page, it's probably faster just to click on the link up here. As well as being able to see recent Boards that we've looked at. Don't worry, we're going to look at Agile Boards and these Boards later on, just know that this is where you can access a lot of the recent things that you've looked at.

Then moving along, a lot of these just start to make sense as we're going through this course because we are looking at what the Projects and Filters and Dashboards are. I know we got a sense for the concept of Projects previously, but we'll actually see them working inside of JIRA, so it'll start to make more sense. But for now, just know that this is where you're going to access all of those things.

So you can see I have a project that I've starred here, and actually we can come in. And if we remove it from the star, then we'll see this update, let me go ahead and refresh. We can see it's no longer starred, it's recent. So as we view more Projects, this one will eventually get kicked off this list in the menu. Or, we could come in and we can star that to make sure that it is always there in this menu. As well as of course, as you can imagine, finding it under all of our starred items on the Your work page.

Next to the Projects, we have Filters. Now essentially, in a nutshell, Filters are saved searches. And like Projects, you can star your favorite Filters, if you want to make sure you can see them up here for quick access, you can view all the Filters that you have. Or you can start building a new one through advanced search. And again, we'll look at that in more depth later on in this course.

Next to the Filter, we have Dashboard. So a Dashboard is essentially a quick way to access things that we're working on, or build charts, things like that. But one of the big differences between this Dashboard and the Your work section is Your work is just focused on you, the user that is currently logged in.

A Dashboard can be customized. You can add in different gadgets, different reports, different I mean, you know pie charts, things like that, and then share them across different users. Multiple teams can have the same Dashboard so everybody sees the bugs as they come in and things like that, as opposed to everybody going to their own Your work page, which is going to change as you know, different users are seeing different things. So that's just one thing to keep in mind.

One thing I would like to point out with this is depending on your version of JIRA, if you're using an older version of JIRA, then the Dashboards are the default place that you go to when you log in. The Your work section is relatively new in the last year or so. Around 2020, I believe, is when they started to migrate over to the Your work section being the default place where you log in.

Next to Dashboards, we have People. So this is where you can find other people in your organization. You can start a team; we'll look at this later on in this course. But it's just a place where you can get a collection of people together to work on things and being able to see what other people are working on very quickly. And then, of course, we have the Apps and I mentioned this in the last section, the Atlassian marketplace where there's a lot of functionality that you can add on to JIRA.

Throughout this course, I will not be using any of these Apps or Add-ons. This course is specifically designed that way so I won't be using those extra third-party things that you won't have access to without paying. But you can explore the marketplace and you can find new apps in here.

Moving right along, we can click on the Create button to create an issue. And don't worry, we'll be looking at this screen and we'll be using this quite a bit throughout this course. Just know that's where you can create an issue here. And then up at the top right-hand side, we have a Search. So searching for Issues or Boards or things in our JIRA installation, we can search for

those here, I do want to point out that we can get to the advanced search which is where we can go to create our Filters.

So again, under Filters, you can see the Advanced issue search, going to the same place just another way to get there. Or we can see all of the Issues in our JIRA installation. All of our Boards, Projects, Filters, or People. One thing I do want to point out here has to do with the permission levels. So going to all the Issues, if you are a JIRA administrator, you're going to be able to see everything.

If you're not a JIRA administrator, you're going to be able to see all of the Issues you have access to. So that might be a specific project. But you might have access to the web dev project, but not the marketing project for example. Those permissions are set up by your JIRA administrator. And then over here, we have Notifications. So this is pretty straightforward. You'll start to see numbers pop up here when you have notifications, like when someone comments on an issue that you're watching, or when someone tags your username somewhere in JIRA, this is just a quick way to hop to wherever those notifications come from.

You can see down here it's saying, hey, there's notifications and chat apps, right? You can connect your JIRA installation to Slack or to Teams to get notifications in there. You can get notifications through email as well. But then all of the notification that you see in any of those other integrations, you'll also see here inside of JIRA showing up at the top right-hand side here. And then we have Help.

This is pretty straightforward. But I do want to point it out because if at any point as you're following along with this course, if something doesn't make sense, make use of this. Atlassian has some super detailed and incredibly helpful documentation that can answer just about any question that you have. And not only for this version of JIRA, but they have it for previous versions as well. So if you're using an older version of JIRA Server, and you see something that I'm working on, that is a newer feature that you don't have access to, then you can do a search for it and see if there's a workaround or if there's something else that you can do in there.

And if the Help documentation doesn't have what you're looking for, Atlassian support team is amazing. Even though I am not associated with Atlassian at all, I've interacted with their support team a lot over the years. And they've been really helpful to either fix a problem or if even if it's just someone to bounce ideas off of for the best practices say, hey, this is what I want to do, what's the best way to set this up and organize this inside of JIRA? So, take advantage of the Help if you ever get stuck.

And we have our Settings. So if you are a user, you'll have limited options in here. You won't have access to things like your organization's billing details and all of that information, as well as adding users that's something that will increase the bill. So depending on your permission level that will determine what you see in here. But at the very least, you'll see things like your personal settings.

So you're managing your time zone, managing your email notifications that you get directly from JIRA, things like that, your profile information, stuff like that. And then of course last but not

least, we have our personal settings, same as pretty much coming in here, changing profile, things like that. Pretty straightforward stuff as far as the personal settings are concerned. Okay, so that is a look at the user interface in JIRA, I know I threw a ton at you there.

And of course, as you've seen throughout this video, as we choose things from the top navigation, then all of this area here is going to change to show whatever it is, wherever we're navigating to, as you would expect that primary work area changes. And we'll get familiar with all these different areas in JIRA as we start to dig into things. But for now, I would encourage you to take some time in between videos, click around in here and just start getting accustomed to where things are at and how the interface changes when you click around.

And don't worry, you can always get back to this Your work area by clicking on the logo up here. And that brings us to an end of this section. In the next section, we'll start by getting an understanding of the two types of Projects inside of JIRA Team-Managed Projects and Company-Managed Projects. See you there.

Section 3 – Team-Managed vs Company-Managed Projects

Video: Team-Managed vs Company-Managed Projects

Dan: Before we dive into learning about Team-Managed Projects, we'll take a couple minutes in this video to learn what Team-Managed Projects are, and how they compare to the other type of project in JIRA; Company-Managed Projects. So let's start with our Team-Managed Projects.

Team-Managed Projects were introduced into JIRA in 2018 as next-gen projects, and then they were renamed in 2021 to Team-Managed Projects. The primary reason why I want to point that out is because JIRA's first release was in 2002. So, Team-Managed Projects coming in at in 2018 is relatively new. So depending on what version of JIRA you're using, you may or may not have access to these.

Now one of the key things about Team-Managed Projects is that they do not require any JIRA administrative permissions to create them. And the reason for that is because all of the entities live inside the project. And by entities I mean things like the Issue types. So, any Issue types that you create inside of a Team-Managed Project lives entirely inside that project. By comparison, the other type of project, the Company-Managed Projects, they used to be called Classic Projects, and they were renamed in 2021 as well to correlate with the Team-Managed Projects.

A Company-Managed Project requires JIRA administrative permissions to create. One of the key reasons why JIRA admin permissions are required for a Company-Managed Project is because entities can be shared across other Company-Managed Projects. So those entities, things like Issue types and statuses and resolutions. For example, if you create a custom Issue type in a Company-Managed Project, any other Company-Managed Project can use that. So you have to have JIRA admin permissions across all of those projects to be able to assign those Issue types to those different projects.

On the flip side, if you create a custom Issue type in a Team-Managed Project, it only lives in that Team-Managed Project. No other Team-Managed Project no other Company-Managed Project has access to that particular Issue type. I mean, I suppose you could create another Issue type if you create an Issue type called Bug in one Team-Managed Project you could create another Issue type called Bug in another Team-Managed Project. But from the back end, as far as JIRA is concerned, those are two different Issue types, they just happen to both have the same name.

Okay, so to recap, Team-Managed Project have project scope entities, so things inside the Team-Managed Project entirely live in that project. For that reason, or because of that, there's no special permissions to create a Team-Managed Project. When you create one, you become the administrator of that project, and everything that you create lives inside of that project. That makes them very fast and easy to set up and maintain because any team member in the organization can create one and they can then maintain that project. They can invite other users to it, and the team can work together.

Company-Managed Projects on the other hand, because they have global entities that are shared across the entire organization across the entire JIRA installation, that means that requires that they have to be created and maintained by JIRA admins. So for that reason, they can be more complicated to set up and maintain because these entities are shared across multiple Company-Managed Projects.

We'll be looking at the more complicated Company-Managed Projects and digging into those later on in this course. But for now, let's move on to our next video where we'll learn how we can create a Team-Managed Project.

Video: Creating a Team-Managed Project

Dan: In this video, we'll look at the process of creating a Team-Managed Project. Fortunately, this process is very simple. All we need to do is to come up to Projects, Create Project. Now we can pick the Project template.

So, this would go back to some of the concepts that we learned about the last section. Is our team using a Kanban workflow, a Scrum workflow with sprint? If you're not familiar with these terms, we covered them in our previous section, just the concepts, these are Agile concepts. Or maybe we just want to bypass Agile altogether and manage a list of Issue types like Tasks and Bugs.

Or over here on the left, there are a lot more Project templates that we can pick from. I do want to point out that, depending on our version of JIRA, we may not have access to all of these templates. So let me show you what I mean. If I come into Service management, and let's pick let's say the IT management one here at the top.

Notice there's a lock on this template. That's letting us know we don't have access to these yet, because I'm using JIRA Software for this course and this template requires features that are in JIRA Service Management. Now, if we have admin permissions with access to billing, because that is a different product with different billing, we would have to have access to that, we could unlock that now. The same goes for a lot of these templates.

If we see this lock, basically it means our current JIRA license doesn't have the features that we need for that template. Now there are some templates that we could use. Let's go into Design and pick this one here for Project management. You can see this is using JIRA Work Management as product, but we have access to this template. The reason for that is because I'm using JIRA Software and JIRA Software is basically JIRA Work Management with the Agile software development features built on top. So, I have access to the JIRA Work Management templates.

But let's go back to software development, I'm going to pick the Kanban template, and we can see what this template is doing for us. It's going to create some Issue types for us; the Epic Issue type, Story, Bug, Tasks, Subtasks. It's going to give us a workflow here with the columns on our Board, pretty simple. The To Do, In Progress, and Done. Let's go ahead and use this template.

Now the key thing to point out here is really this part right here. I want to mention this because when we create this project, if we create it as a Team-Managed Project, we cannot switch that to a Company-Managed Project later on. We have to create a whole new project to do that. And the same is if we create a Company-Managed Project, we cannot switch that to a Team-Managed Project later on. So, we have to know which one we want to do at the point of creating.

So let's select our Team-Managed Project since that's what we're working with here today, and let's give this a name. This will be our Website 2.0, give this a key. So this key is going to be on all of the Issues. So if we say this key is WEB, so all of the Issues will be WEB-1, WEB-2. It'll just be a sequential order for all of the Issues that get added into our project. Then once we're happy with this, click on Create and our project gets created.

JIRA

Alright, so now that we have our Team-Managed Project created, let's get familiar with how it is organized here in JIRA and we'll do that in our next video.

Video: Navigating Team-Managed Projects

Dan: In our last video, we looked at creating a Team-Managed Project. In this video, we'll continue right along and look at how to navigate around that project. So right away, we can see by default, we're taken to our projects, Agile Board. And this is a Kanban Agile Board based on the Project template that we chose in the last video.

So the workflow for this is to take Issues from left to right, so let's create a new Issue here. Let's say this is our let's just say build flow chart for website functionality, there we go. Once we have this created, we can see a few different things here. So one, we can see the project key. This is something again pointed out in the last video when we created this project, this is the first Issue.

So we can take this and we can left-click and drag throughout the different columns, right. So that's the basic process that we're going to do; take the Issue from left to right, as work is completed. Now we can customize this, let's say you know what, we actually need a new column here for QA. So we can track that.

So once we create this, you can see how the cursor changes to a hand, I can left-click and drag the entire column to organize this. And you know what before this is actually done, we need to run this through QA to make sure that this has been done. And then once that's done, you can actually pull that in.

Now up here at the top, we can filter any of the Issues. So if we wanted to filter those Issues, say just show the ones that have to do with the flow chart, you can see how it's highlighting that. Of course we only have one Issue on here so it's pretty simplified. But we also have the ability to see who is in this project and who really filter by that. So only see the Issues that are assigned to me, right? So right now, none of the Issues is assigned to me.

Let's change this here. Select this, and the assignee right now it's unassigned. Let's assign this to me. And now we can see this Issue has been assigned to me. And we can start to filter those Issues based on who those Issues are assigned to within the project.

Now we can take that to another level if we want by grouping them so we could group by the assignee or by if there's subtasks. Let's see what this looks like. You can see when we group this, it creates an Agile. This is called a swim lane. Therefore, what this does is it gives another way of viewing and filtering out the Issues. If you think you know we have a lot of different Issues on this Board.

Being able to group them is really, really nice way of doing that. See, okay, these are the Issues that are unassigned, which maybe we need to assign that to somebody and make sure that that gets done so work isn't slipping through the cracks.

Of course, in this example, we only have one Issue and it's assigned to me so we only see this one. Actually, you know what, let's change that. Let's look at creating more Issues and get a better look at that screen that we saw when we assigned that Issue. So let's move on to our next video where we'll do that.

JIRA

Video: Creating Issues in Team-Managed Projects

Dan: In this video, we'll look at creating Issues in Team-Managed Projects. So there's a couple ways that we can create Issues including the one that we looked at in our last video here on the Board. Just to clean this up, I'm going to go ahead and switch this back so we're not grouping it by the assignee.

So we can come in and create an Issue. Let's say maybe this is our UX plan for web app, whatever our Issue is, hit Enter on the keyboard, and we have our Issue created. Now another way that we can create an Issue is using the Create button up here at the top, or by using the keyboard shortcut, C for create. So when we hit the keyboard, make sure I don't actually have that selected, there we go. Hit the keyboard shortcut C, and we can see it's going to pop up this window where it can create an Issue.

Now, the key difference here, as we can see is, we have a lot more fields that we can fill out when we create the Issue this way. So let's give this a title, there we go. Now this little red asterisk here of course means that this is a required field. The summary is kind of a special field in JIRA. So if you look on the Board here, you can see that's the summary. And so it's displayed in different places inside of JIRA that make the summary a required field really across all of the Issue types. And we can add whatever we want to these fields.

But I do want to point out this little checkbox down here, this is just a little tip, from my experience, it's saved a lot of time. Because as soon as I hit Create, this window will close. But if we're creating multiple Issues, then sometimes it can be just time consuming to hit Create, and then it closes and then we have to open it back up again. So if we check this little Create another box, when I hit Create, this window is going to stay open.

So we can create another one, whatever we want our summary to be, or we could just continue creating those. We can see our other Issue has been created, I can uncheck this, and now when I hit Create, that window is going to close out and we can see those Issues have been added to the Board. Another little tip when creating Issues, let me hit C to get back to this here is if we don't need all of these fields, sometimes especially again, if we're creating multiple Issues, sometimes it can be annoying to see all of these fields and have to scroll up and down if we don't really need to.

So we can configure the fields and customize this to only show the ones that we want. We want it to show an attachment, show how it's flagged, we want to add in labels. However, we want to customize this, we can configure those fields that we see just to make it a little bit faster to fill this out and create our Issues. Now it is worth pointing out that we can customize this and add or remove fields from this list. And we'll look at that in our next video when we're configuring this project.

But before we do that, there is one more thing I want to show. Let us create this Issue here, design there, create that. So all of these Issues here, we can see a difference between these Issues and this one right here, who it's assigned to. So we can assign these to different users. Even if we

didn't fill these fields out when we first create it, if we create it on the Board, and it just creates the Issue right away, like we saw for this one here.

As soon as we click on the Issue, it's going to open up this screen where we can see those fields and you know, assign it to somebody else if we want to, assign it to Mary on our team. And then once we close out, we can see this is assigned to Mary, right, and this one's assigned to Dan. And these are unassigned.

So again, if we go back and we can group these, we can start to see how all of these works together and how we can use these Issues to start to filter down to only what we need to see. So when Mary is working, maybe she only wants to see the Issues that are assigned to her because those are the ones that she really needs to focus on so she can filter those out. Similar to what we looked at in our last video when we were getting familiar with the layout.

Okay, great. So now that we've seen how we can create Issues and gotten some tips and tricks there, we've gotten more familiar with the fields that are on the Issue by default. Let's move on to our next video where we'll look at some of the ways that we can customize our Team-Managed Projects. See you there.

Video: Customizing Team-Managed Projects

Dan: In this video, we'll look at some of the ways that we can customize our Team-Managed Projects. So let's start with Issue types and how we can add in a new Issue type. Before we do that, I'm going to hit C on the keyboard just so we can see right now, we currently have two Issue types in here. We have our Task and our Epic, so I'm going to cancel out of this, and let's add in a new Issue type.

So I can go into Project Settings, Issue types, and then add in a new Issue type over here. You can see that JIRA has a couple of them that are suggested that we can add, right? So, we could either add one of these in, add that, and now if we create a new Issue, we'll see that there's a Bug in here as well. Or what we can do is we can come in and create our own custom Issue type.

So maybe, let's call this an Idea, let's change the icon to the light bulb here, create that. And now we have our own custom Issue type that we've created in our project. And you can see right here where we can customize the fields that are on that Issue. So again, if I create this, we can see kind of how it looks on the other end. If I switch to a bug, let me show all the fields that had that filtered. So we can see the fields that we have on this Issue type.

Now if we switch this to our new custom one, we can see these fields, and we can customize these. So let's say you know on the Idea, let's give this a due date. Actually you know what we could even come in here and say, let's give this a drop down. Actually, let's do this on the Bug. Let's do that on the Bug. Save this, and on the Bug, we'll come in and do a drop down. And this is going to be location on sites. And then fill in the options that we want in the drop down. So maybe it's in the header, the body, or the footer, right? Make sure to save the changes.

Now if we create a new Issue, and we have this as a Bug, we can see we have this drop down that we've added. And this is just a really great way to be able to organize everything to be able to say you know what the Bug is actually in the footer on the site. And then we could start to fill this in and start to you know, add in more descriptions to that. But on the Idea, we have a due date. That field that we added in, we don't have the location on the site field.

So hopefully this starts to get the kind of the gears turning in your head, you can start to see how the fields are on the Issues. And like I mentioned early in the last section, how the Issues contain the fields that are going to contain your data and you can come in and start to create custom fields. Or, add in some prebuilt fields basically is what JIRA has for some of those like the due date, really just kind of a prebuilt field that is a date field, right, that is automatically created for us.

Okay, so before we wrap this up, I want to kind of go over some of the rest of the settings that we can customize Team-Managed Project. Customizing the Issue types is probably going to be one of the more popular things that we are going to do. That's why I wanted to focus on that quite a bit. But let's go through some of these other settings that we have to customize our Team-Managed Projects.

So head back to our Project settings here. So in the details, these are some of the settings that we picked when we created the project. We can change that here things like the name of the project, the Issue key that you can see here, as well as choosing who the default assignee is going to be. So when we were creating those Issues, they were assigned to nobody. We could choose instead, you know what I want it to be assigned to the project lead, which we can set right here.

So if this was set to project lead, when I create a new Issue, unless I assign it to somebody specifically, then it will be assigned to the project lead, in this case, Dan. What I've done in my experience with teams here is to set a point of contact on the team to have any Issues created assigned to that person.

So that person is kind of in charge of making sure that nothing slips through the cracks. They will then delegate who it needs to go to or if it's something that they need to do, then of course they can take control of that as well. We have the settings for our Board. So in here, we can come in and add in new columns that we looked at, we can reorganize the columns if we need to. We can customize our Board however we want.

Now you'll notice we have the columns here, but we also have the statuses, right? So this is something that's kind of cool. I'm going to take this, let's add this here, and let's come in and delete this column. So now we have two statuses on a single column. Watch what happens when we do this, I'm going to come back to the Board here. Now, if I group this by nothing. Okay, so now if I come in here, and I click and drag this, I can say, you know what, I can either take this to In Progress, or I can take this to QA. So those are statuses, right?

So if I click on this, you can see the current status of this particular Issue. If I take this and drag it to QA, that takes that Issue and puts it in the QA status. So that's really what's going on behind the scenes. If we head back to the settings here, we can see. That's really what's going on behind the scenes is we have the columns in the Board. And then when we drag an Issue from one column to another, it's changing the status of that Issue.

Now in my experience, there are a few different reasons why you might want to do something like this. But probably the most common that I've come across is a simple reason that some teams have a lot of different statuses for Issues. And if every single one has its own column, then you might have to start scrolling left and right to see all of the columns that you have on your Board. Putting multiple statuses into a single column can make it a lot easier to see everything at once.

Okay, so let's go back to our Project settings and look at some of these other settings that we have here. We have the Access, so we can control who can see our Board or who can see basically our project. So right now we can see anyone that has access to the entire JIRA installation can access and administer this project. And depending on what plan we have, what license we have to JIRA will allow us to unlock more control over who has access to this project. And we have the Issue types, we looked at that already coming in here and customizing the Issue types in this project.

We can control the Notifications. So, when somebody creates an Issue right now, anybody who is watching that Issue who is assigned to, or who has reported it, which, in JIRA, the reporter is the person that created the Issue, the user that created that Issue, then we can come in here and customize this if we wanted to, to control who gets the notifications. But by default, usually I found the defaults here work pretty well. Then we have the Feature. So we can come in here and turn on or off some of the features.

So if we go back to our project, we can see we have a Roadmap here. And we'll look at Roadmaps later on in this course, kind of what those are. But we can turn that on or off if we wanted to. So if we turn that off, and come back, and we can see that's no longer there. Same with the Code. It kind of depends on what we're using this project for. Some of these things are set up with the Project template that we created, right? So because we created one from software development, it's going to automatically turn on Code where we can link in some of our other development tools like Bitbucket or GitHub, things like that. And then we have the Apps. We've looked at Apps before.

Some of the Apps in the marketplace. I should say I mentioned where you can go to discover and find those Apps similar to up here. I do want to point out the Automation. Automation is something that we will look at later on in this course as well. But this is where you can come in and start to automatically tell JIRA to do things. Think of tools like If this then that, or Zapier, JIRA has some of that automation built in automatically. And we'll look at that later on in this course, when we're looking at it with a Company-Managed Project. But we can also do that in Team-Managed Projects here as well.

The concepts between those features like the Roadmap and Automation between Company-Managed Projects and Team-Managed Projects are really the same, similar to the Issue types being the same. The big difference is what we learned earlier where in a Team-Managed Project like this, everything in here lives in this project only. For example, the Idea Issue type that we created doesn't live anywhere else but in inside of this Website 2.0 project that we created.

So hopefully the gears are starting to turn for how you can customize your own Team-Managed Projects. And with that, we've come to an end of this section. I would encourage you to take some time between the sections now to play around with some of these features. And when you're ready, we'll move on to Company-Managed Projects and start taking a deeper look at a lot of the features and customizations that we can do in JIRA. See you in the next section.

Section 4 – Creating a Company-Managed Project

Video: Creating a Company-Managed Project

Dan: In this video we'll kick off this section by learning how we can create Company-Managed Projects. Now the process for creating a Company-Managed Project is very similar to when we created a Team-Managed Project. So if you watched that in the last section, then a lot of this may seem familiar. But there is one key difference; you have to have JIRA administrative permissions to be able to create Company-Managed Projects.

Not everyone can create or customize a Company-Managed Project like you can a Team-Managed Project. But if you are a JIRA administrator to create the project, come up to Projects, Create Project. And then in here just like with a Team-Managed Project, with a Company-Managed Project, the first step is to pick the Project template. So this would go back to what we learned about earlier in this course.

What sort of organization do we want for this? You know, who in our organization is going to be using this project? What are they using it for? Are they going to be using a Kanban Workflow, a Scrum Workflow with Sprints? And at this point, usually what I'll do as a JIRA administrator is I'll sit down with a team leader or team leaders, if there's multiple teams that are going to be using this project, and get a sense for what their goals are, what are the things you're trying to track?

What sort of Workflows are your teams using and the members of your team using, and what are the expectations for what this can get? And then from there, I'll figure out which template will get me most to that point. And then you know, later on in this course, we'll look at how we can start to customize some of the things that the template does with Issue types and Workflows and things like that.

But the templates can get you part of the way there. Over here on the left-hand side, we have a lot of different templates in here. I highly recommend going through and just looking at some of these different templates, seeing what is available, and what sort of templates you have access to.

Because one key thing to keep in mind here, if we come in here, and maybe come to one of these templates, we can see this template is currently locked. That lets us know that we don't have access to this. And that's because I'm using JIRA Software for this course. And this template requires us to be using JIRA Service Management, which is a product that has features that I don't have. And so this template is trying to use some of those features, but I don't have the license for that.

Now, if we do have JIRA administrator permissions, with access to billing, then we could unlock that and we could pay for that. That's going to be an extra cost with the license. That's something to keep in mind with that. But I just want to point out if you see this lock, that just means it's trying to use features that your license currently does not have.

So, let's hop back to Software, I'm going to select a Scrum template. And we can see what this template is going to do some of the Issue types it's going to bring in, the Workflow over here on the right-hand side. So if we use this template. Now we'll be taken to the Project type. And this is something again, that we looked at very similar to the Team-Managed Project.

The key thing I want to point out here, once again, just to reiterate this is this part up here, you can't switch from a Team-Managed Project to a Company-Managed Project or vice versa, right? So if we create a Company-Managed Project here in this video, we can't switch that to a Team-Managed Project later on, we would have to actually create a whole new project to do that.

So let's go ahead and select the Company-Managed Project, let's give this a name. So this would be, say our Marketing Team is going to be using this project. And I do want to point out so even though there's Team-Managed Project, it's called a Team-Managed Project, right, you could still use Company-Managed Projects for the team. And as a JIRA administrator, the benefit of that would be you can create Issue types or Workflows, or Statuses that can be shared across multiple Company-Managed Projects, right? Instead of the Team-Managed Projects that everything is all encompassing in that one project.

Once we're happy with this, let's go ahead and create the project, and there we go. Now that we have our Company-Managed Project created, let's move on to our next video where we'll get familiar with what we're looking at here and how to navigate around it. See you there.

Video: Navigating Company-Managed Projects

Dan: In our last video, we looked at creating a Company-Managed Project. So let's take a couple minutes to get familiar with the interface and some of the features that we have in a Company-Managed Project, starting with the left side menu.

So this first menu item is going to show us the other Agile Boards either in this project or boards that we have access to across the JIRA installation. And this is important this is a cool thing to keep in mind about Company-Managed Projects that's different from Team-Managed Projects is in a Company-Managed Project, we can have as many boards as we want living inside of that project, we can see all of those right here.

Next, we have the Roadmap, this is looking pretty empty right here, because we just created this. And we'll be looking at this more in depth later in this section. But for now, just know that the Roadmap is a high-level way to see all the Epics in our project and their status. So earlier, when I was talking about the concepts of Epics and Stories and how they linked to the Epics, the Epic itself can be a great way to see all of the Stories or Issue types that we've broken down to fit inside of a Sprint.

And then the Epic itself, there may be more than one Epic across the project. So the Roadmap is a great way to see all those different Epics, that then each of those Epics are going to have other issues underneath them, right? So it's kind of a hierarchy thing. And the Roadmap is just a nice way to get a really, really 10,000-foot big picture view of the Epics in our project.

Next, we have the Backlog. So Backlog is another Agile term relating to the Agile Board. So like we were learning earlier in this course, about Sprint meetings where a team decides what work is going to get done in the next Sprint, that work actually is going to come from the Backlog. Then throughout the Sprint, as new things come up, they get added to the Backlog since the team has already decided what to work on for the duration of the Sprint.

So the day-to-day is actually going to be done in this active Sprint area. And then as new things come up, those issues can get created throughout the Sprint, but they're not going to show up on this board, they're going to show up in the Backlog for the next Sprint planning meeting. Now I know there will be times where there are emergencies and things really have to be added. But the goal of the Sprint is we've decided that this is going to be the work that gets done.

If there's new work that comes in, then we're going to have to take something else off. That's just the Workflow that happens. Because, you can't make up more time in the day we've already allocated all of the time for things to get done.

Now under the Reports is where we can find things like the Burndown for the Scrum Board. So the Reports for a Scrum are going to be different from Reports for Kanban. There are some that are pretty universal, you know, the average age, you know how long it's been from created to being resolved for each of those issues.

We will look at some of these Reports later on in this section. But I'd encourage you to take some time, there are a ton of Reports in here. And of course, all the data is going to be different. The data that I'm using and recently just created this, right. So there's not going to be a lot of data for a lot of these Reports. But the data that you have on your side, as you're creating issues and as your Workflows are going, then it's really cool to see some of these and see how they can start to see where some of the roadblocks are, and start to break some of those down.

Now if we go back to the project, we have the issue. So this is where we can see a list of all the issues that live in a project. So this is just a simple list of all the issues in the project that we can filter down by status, by who it's assigned to, things like that. This is very powerful feature. We're going to look at this again more in depth later in this section. But just know for now that this is where we can almost bypass the Agile Boards and see just a list of all the issues that live inside of this project.

Go back to the project here, we have Components. Now Components are a way to group together issues that are related. So let's say our website has a checkout system. Well, that can be a component. So all the Stories, Bugs or any issues that are related to checkout can be easy to find. It's just grouping all of those together.

Next we have Code. So, if we want to link this up with Bitbucket, GitHub, GitLab you can see there, source code management tools we can do that, and see those repositories very quickly here inside of JIRA and start to see some of the branches commits and pull requests and things like that.

Releases are similar to Components. But releases, think of them more like versions, right? So you can see it starting versioning. So think of anything that is Version 2.0, or Version 3.0 of our website or app, all that can be tied to a release can be super helpful when you're writing the change log or things like that, to see exactly what Bugs what Stories, what issues were resolved in that release.

So the Project pages is really a link to Confluence. Confluence is a separate app from JIRA, so we're not going to be covering it in this course. But just know that Confluence is Atlassian's wiki documentation tool. So you can link a space filled with pages for documentation or whatever it may be in Confluence to a project in JIRA. So that's what this is for, to be able to go back and forth with those very quickly. And then these last two menu items are pretty straightforward, we can add a shortcut.

So adding a shortcut either to the certain repository, or I've worked with teams sometimes where they just want to add a shortcut to maybe another intranet, or specific web pages that are referenced. And when you add that, you can see the website address and the name, it's just going to add it over here on the left side menu. It's a quick way to navigate to that very, very quickly, just a way to speed up your team's productivity.

And then last, we have the Project settings. We will be looking at these more later on in this course. But, I want to point out here one key thing here is you have to have administrative permissions to the project, not necessarily to JIRA overall, but to this project. You have to have

administrative permissions to see the Project settings. So if you don't have administrative permission, then on the left side menu, you're not even really going to see the Project Settings link there.

Okay, so we covered a lot but as you can see, there's so much more that we have yet to cover as we start digging into all these different features. And we'll be looking at most of these more in depth throughout this section and later on in this course. But for now, let's move on to our next video where we'll have JIRA create some sample data so we have some things to work with.

Video: Creating a New Scrum Board

Dan: In the past few videos, we've looked at a Company-Managed Project. And when we created the project, it came with a Scrum Board. However, we don't really have any issues in it. So in this video, we're going to do a couple things, we're gonna look at how we can create a new Scrum Board in the same project. And while we're at it, we will also have JIRA create some sample data, so we have some issues to work with.

So let's start by creating a new Scrum Board in this Marketing Team project that we've created. Come over here to the Board drop down, click on Create Board. And the key thing I want to point out here is we can create a Scrum Board come in here, click this button, and we'll do that here in a second. But I also want to point out, we can create a Kanban Board. Even though we use the Scrum project template, we can create a Kanban Board in that same project.

The template is really just how things are set up. From there, we can customize things however we want. And vice versa is true as well. If we created a project with a Kanban template, we could create a Scrum Board in there as well. So let's create a Scrum Board. Now here, we need to tell JIRA where we want to create this, right? So do you want this board to be created with a new project?

That's basically what we did in the last video, except we went the other route, we created the project with the board. This is creating the board with the project, end result is the same, it's just a matter of kind of where you go to do that. We can create the board from an existing project, or you can create it from an existing Saved Filter.

Now we haven't looked at Filters yet. Essentially, think of them like Saved Searches. So we can create a board around a filter. And we'll look at how Filters are a vital part to boards, and we'll look at those here in a little bit. But for this video, we're going to create the board from an existing project. Now we need to give this a name. So let's call this our Sample Scrum Board.

Now we need to tell JIRA two things. One, what is the project that we want this to be based off of, where do we want those issues coming from? So let's say we want them to be coming from the Marketing Team. And then by default, JIRA is going to say, "Oh, that's a project. We're going to have this live in that same project". We could change this if we wanted to. If we wanted the issues on the board to be from the Marketing Team, but we wanted the board itself to live in the LeFebvre T project, we could change that.

So, they can be independent of each other. And this is where it can get a lot more complex, but you get a lot more customization of how you can organize things across these Company-Managed Projects. Alright, so let's create our board, and there we go. We have this new board, let me skip this. So it's the same as the other board, as you can see. Because they're both Scrum Boards, they're both blank Scrum Boards that we've just created. But we can customize these separately.

So as we're going through some of the customizations in this section, just keep in mind that you can have multiple boards and different customizations for different boards living in the same project.

Okay, so now that we have this board created, let's have JIRA give us some issues so we have some data to work with so everything isn't completely blank like this. So to do this, I'm going to come up, come back to Create Board. And instead of just creating the board, I'm going to create the board with some sample data.

Now there is something to keep in mind here, when we do this, it's going to create a new project. We're not creating it from an existing project or an existing filter, we're creating a whole new project that's going to create that, put some issues in that project, and then also create a board, okay? So I'm gonna say we can leave this as a Sample Scrum Project, that's fine. Go ahead and create this.

Now JIRA is going to go through the process of creating the project, creating the board, and creating a bunch of issues for us on that board. So let's give it a moment to think about that, and there we go. So, we have a bunch of issues on here, and we'll look at this here in a little bit, kind of get familiar with what we're looking at here. But for the purposes of this video, I do want to point out that we have this new project that's been created, the Sample Scrum Project.

You can see the ID key. SSP is that key for that project. And that's different from the Marketing Board, or even the Sample Scrum Board that we've created. You'll notice that these don't have any of those issues. So, let's move on to our next video where we'll get familiar with what we're looking at here, and all of this interface and get familiar with the board itself. And then we'll get into customizing the board and how we can get issues on that sample board that we created, see those across different projects.

Alright, so I'll see you in the next video where we'll get a good overview of this screen here.

Video: Scrum Agile Board Overview

Dan: In the past couple of videos, we've looked at how we can create Scrum Agile Boards and Company-Managed Projects. Now that we have a lot of data, a lot of issues on our Scrum Board, let's take a couple minutes to understand what we're looking at here.

So as with everything with the left menu, you can see we can hover over, we can collapse, or open this up. That's really the case anywhere here inside of JIRA just give us a little bit more room to see things. Depending on how many Columns you have on the board. That's where I find it can be really, really helpful to collapse that if we need to.

Up here, we have our Breadcrumb. So we can see where we're at, right? So this is the board that we're on, the board lives inside this project. And then this project is, well it's a project so we can access all of our projects by clicking on this Breadcrumb link here. And then down below, we can search so we can filter the issues on our board. So let's say we only want to see the issues that have fecund spelled properly detail in them.

You can see it has details in the Summary. So this is the only issue that we're filtering. So just a quick way to filter all of the issues on the board. And then to the right of that we can filter based on the user that that issue is assigned to. We saw this when we were looking at the Team-Managed Projects, it's the same concept here in the Company-Managed Projects. If we only want to see the issues that are assigned to me, to Dan, we can filter that, or we can find any of the issues that are unassigned. Or, if there are other people who have issues assigned to them, we'll see them show up here and we can start to filter them out.

You'll notice that that's actually additive as well. So we can add, see any issues that are assigned to me and unassigned or assigned to me and somebody else, can add that as well. Right here, these buttons here may look a little different on your side if your JIRA administrator has started to customize some of this. So these are called Quick Filters, and these two right here are kind of prebuilt, they're built in. But these are fully customizable by really the project administrator can customize these as well. Just a quick way, again, to filter things.

So only the issues that are mine, or only the issues that have been updated recently. Which recently, I think it's a day, we'll look at these Board Settings here a little bit. But yeah, update it. Yeah, so updated within the past day is what recently means. But you know, we can customize that right. And again, we'll look at customizing Quick Filters later on in this section. Over here on the right side, let me clear this out so we see all of the issues on the board.

Over on the right side, this is for Automation. So, we can start to add some Automation to the issues on this board. We'll have a video dedicated to the basics of Automation and how that works in the next section, but just know that you can access some of that here directly on the board. We can Star this board. So we looked at starring projects earlier in this course, it's the same concept. Think of it like bookmarking, or favoriting. If you were to star this, if we go under Your work, under the boards, you can see the recent ones that we've accessed, but watch what happens when I star this.

Now if I come here, we can see it's always going to be up there. Might need to actually refresh for it to update. There we go. So we can see this board has been starred so it's not in the recent anymore, it's always going to be pinned essentially to the top of that menu. So just a quick way to access the board if we want quick access to that.

To the right, we have how many days are remaining in the Sprint. So this is going to be based on how long the Sprint is. If you remember from earlier section a Sprint has a predetermined amount of time. So if your team is Sprinting for two weeks, and this is the first day of the Sprint, you're gonna have two weeks left, you know 14 days left on that Sprint. So this is just a quick way to be able to see how much time is left to get all of the issues on the board completed.

Then to the right of that we can complete the Sprint so once the Sprint is over, and we're going into our Sprint planning meeting in the Sprint planning meeting, we'll complete this Sprint before we actually start a new one. So, this is where you can do that. We can share the board so we can share this with anybody who has access to this project inside of JIRA. Alright, so if you try to share this outside of the organization and they don't have access to the JIRA, then they'll be prompted to create an account or login or whatever it may be and they won't necessarily have access to that. But you can share this with your team members there.

And then of course, we have the three dots where we can change some more Board Settings. We'll look at that in our next video actually. We do have some Insights here. So they give us some quick stats about our Sprint, you know what our current progress is for the Sprint. Just a quick way to be able to see how things are going without going into the full Reports or anything like that. Just a really quick way to see that directly on the board.

Now before we do get to some of those Board Settings, I want to hop over here real quick. Because a big part of a Scrum Board is the Backlog as well. So let's look through the Backlog in this interface and kind of get familiar with these. You can see there are a lot of similarities. So the Search, the Filter based on Assignee, the Quick Filters, the Insights, the three little dots for the drop down there to get to the Board Settings, all that is pretty much the same. But we also have our Backlog. So these issues are not in the Sprint.

Actually, you know what, this might be a little bit easier just to walk through a sample process for what this Sprint might look like. So let's say we're working, it's the last day of our Sprint, right? So we're in our Sprint planning meeting, we're preparing for the next Sprint, first step will be to complete this Sprint. And so here, JIRA is going to say, okay, there were three issues that were completed, you can see these three issues are done here, three issues that are still on the board that are not complete. So what should we do with those three issues that are not complete?

Do you want to move them to the new Sprint, which means it'll automatically put them on the new Sprint to get done in the next Sprint, whether you know, two weeks a week, a month, however long your Sprint is? Or do you want to shift them to the Backlog. So for this, let's actually add those to the new Sprint so we can see what happens there. Complete this, it's going to take us to the report, we can see how well we did.

We can have that discussion over what went well, what didn't go well, really start to see some of these particular issues that were done, some that were not done, and start to break that down more and really get into some of the details of where some of the roadblocks may have been. When we're ready to figure out what the work is for the next Sprint and hop into the Backlog. And you can see the three issues that we had that were incomplete have automatically been added to the next Sprint.

If we want to filter these, we can filter them based on the team member so who it's assigned to. And in order to be like Dan, these are the issues that you really need to work on getting complete in the next Sprint. Going through each person, we can see the versions so we can see the different versioning and remember we talked about what versions are where we can group together issues. So we can see in Version 2.0, we there are seven issues total.

Two of them are complete. And there's still a couple that are on the Sprint, there are some that are in the Backlog, we can start to filter that down if we want to. We can do the same for Epics. So we can see all the issues that are in Epics, there are currently no issues in Epics. We'll look at those more later on when we start to work with Roadmaps and stuff. But if we have Epics, it's the same sort of concept as the version. It's just another way of grouping those. The same sort of concept as far as this display is here inside of the Backlog.

Now because we had JIRA add those to a new Sprint automatically, we already have a Sprint that's been created. We could create a new Sprint if we needed to, if we didn't have anything here. Or, we can edit this Sprint if we say you know what, we're gonna do two weeks or no, we're gonna do four weeks, we'd have a custom start and end date however we want to for that Sprint. And then the next step would be to add any issues that we need to. So if there are any issues that are in the Backlog that we need to add, then now is the time to do that.

So either we can left click and drag to bring that up, or we can use this little thing right here in order to drag it down and say, how many do we want to add? So maybe we want to add those three to the Sprints, it's just a quick way of doing that. One cool thing to keep in mind, a little tip here, is we can do this using these Filters as well. So let me show you what I mean. Let's say this here, I'm going to come in and let's assign this to Mary so we have a few different issues that are assigned to somebody other than myself.

So now we can say okay, here in the Backlog, let me refresh this so we can see this filter update up here. So we can see okay, now we have Mary up here so we can say, "Okay Dan, it's your turn to go through the issues that you need. There's currently nothing in your Backlog". You know, we could create new issues if we need to, go through that process. When it's Mary's turn, we can look at just hers and say, "Okay, these are the issues you need to work on", let's just drag those in really quickly rather than having to select them and do that.

So, it's a nice way of just being able to work a little bit faster when you're going through that Sprinting process. When you're happy with things that are there, actually, I'm going to take these, I'm gonna hold down Shift, left click, and we can drag those back out. So anything that's Unassigned, we're only going to have assigned issues in the Sprint.

Now the next step is to start the Sprint. Confirm that yep, two weeks. Okay, two weeks from today, start that Sprint. And now we go back to that day-to-day process of taking those issues, working them through the Statuses in the Columns in order to get them to completion.

Okay, so to recap. In this video, we got an overview of a Scrum Agile Board, as well as a quick rundown of an example Sprint Workflow. Now in our next video, we'll look at some ways that we can customize our Scrum Boards.

Video: Customizing Scrum Board

Dan: In our last video, we got an overview of a Scrum Board. In this video, we'll look at some ways that we can customize that board. Now, before we do any editing, let's make a note of what this board looks like right now.

So some of the issues that we have on here, so we have some issues and Subtasks. You can see there are two Subtasks under this story, that's what these are here. And then we have some other issues above a story and another story. So just kind of get a note of what we have here. So when we make some changes, we can see what those changes actually were. Okay, so the main driver for what issues we see on the board is going to be the filter.

So if you come into the Board Settings, come to General, we can see the filter for this board. And this Filter Query is really going to be the driver behind all the issues that we see on the board, right? So we can see all these issues here, these are the issues that are going to be on the board. You'll notice there's a lot more here in this list. But you have to remember we have a Backlog. So let me show you what I mean by that. So let's come back into our project here, I'm going to open this up in a new tab.

So we have these issues on the board. But we also have more issues in the Backlog, right? So the board is really just a way of filtering and displaying all of the issues that are in the filter. So this concept can start to get pretty confusing pretty quickly. And this is really one of the biggest questions that I get from people who are new to JIRA is because it's a bit of an abstract concept. But if you think of, okay, there's a project, all of the issues live in a project, right? There might be multiple projects that have different types of issues. But all issues live in a project. And then a filter will filter that down. It's a Saved Search.

So what do we want? Do we want things that are maybe only In Progress? So now when we see things, if we were to save this on the board, now we're only going to see those issues that are In Progress. Even though we had some over here before, because they're not In Progress, we're not going to see them anymore. As soon as I take this and move it, it's going to disappear because it's no longer In Progress, right? So you can see refresh there, and it disappears.

That's because the filter is saying, only show issues that are In Progress. Let me save this back here. And then we can hop back may need to refresh in order to bring those back. I forgot to save it. Remember to save the filter. There we go. Now we can bring those back so we can see all those issues that we had there before. So again, all of the issues live inside of a project, a filter is going to tell JIRA which issues you want to see on the board. And then where they display on the board will be determined by the board itself.

So have we actually brought that into a Sprint? If not, it's going to show up in the Backlog. If it is on a Sprint, where on that board is it going to show? That's going to be based on the status of that issue. And we can customize that just like we saw in the Team-Managed Projects. If we come into the Board Settings, we can see how this is laid out. So we can see okay, these are the

Columns that we have, these are the Statuses, so the Statuses are tied to the issue. And where do we want those to show up?

So let's say you know, maybe for this week, let's add in our QA status. And let's say we want that to be In Progress, okay? We could add a new Column if we wanted to, or we can just have that in the same one. And then if we head back to the board, now if we take an issue and drag it in, may need to refresh, there we go. So now if we take an issue, dragging it, we can say okay, we want this to be In Progress or QA. And watch what happens.

So this issue is currently To Do. Soon as I drag this over here, the issue is now In Progress, right? So the status is tied to the issue, and where you drag it on the board, based on the Board Settings, will determine what Column has which Statuses mapped to it. Now a couple of videos ago, we created a new blank Scrum Board and there were no issues on it because it's in the Marketing Team project. And this is one of the things that's really cool about Company-Managed Projects is you can see issues from other projects on boards that live in a completely different one. So let me show you what I mean by that.

Come over to the Marketing Board, let's go to the Sample Scrum Board that we created, this blank one here. So this is going to have its own filter. So if we come into the Board Settings, change the filter, and say, okay, there's no issues in here. That's why there's nothing showing on the board. Because there are currently no issues in the Marketing Team project. If we want to show the issues in the Scrum project, or maybe both of them, there's really nothing in Marketing. But we could do both if you wanted to, save this.

Now, if we head back to the board, open this up in another tab again, we can see now in the Marketing Team board, we have this Sample Scrum Board that we created that was blank, and now we have this set up. So this can be completely different if we wanted to. We can come in here and we can say you know what, for this, I am going to add a Column. And this is going to be this needs graphics, right? And maybe we don't have you know, a status created for that yet.

But we could drag this over, and we can have that status map just showing how we can customize this. Head back to the board, and now we can see this completely different Column that we have. So this is one of the huge benefits to Company-Managed Projects is we can see issues from multiple projects in one place like we are with this Scrum Board. And the last thing I want to point out about this before we get back to some of the Board Settings is because the status is tied to the issue itself.

So this one here, let's remember, this is SSP-5, right? So we are on the Scrum Board in the Marketing Team. Now if we head back to where we were before, let's head back to the completely different project. This is a different board. And we look at SSP-5, let's say we take this and we're going to drag this over to Done, okay? So this is now done.

Over on this board, this issue right here, might need to refresh, and we'll see that it will show up over here as Done. The reason for that because it was updated on a different board that when we dragged it to the Done Column, even though it was a completely different board, it changes the status of that issue. So this board here, because it's still on that board, this issue is still on that

board, it says “Oh hey, wait a minute, the status of that issue has been changed. Doesn't have to be changed on this board. It was just changed elsewhere. So now this board is going to reflect that difference”.

Alright, now this video is actually starting to run a little bit long. So let's move on to our next video where we can go back to the Board Settings and get an overview of the rest of those settings there.

Video: Continuing to Customize our Scrum Board

Dan: In this video, we'll continue our look at customizing Scrum Boards by getting an overview of the Board Settings. So let's hop back into the Board Settings, we looked at some of these in our last video.

Let's move along and look in the General here just to get an overview of where things are located, start to get the gears turning for how you can customize this for your team and your organization in order to make them more productive. So in General, we can see of course, the filter. We can change the filter if we wanted to if we wanted to use a completely different one, rather than this one that automatically gets created at the point of the board being created.

We can change the name of the board; we can change the location. So if want to change the project that the board is located in, one of the key things to think about which project it goes into, has to do with the Shares. So right now, and by default, when you create a board in a project, only people who have access to that project can see that board.

So if you want somebody outside the project to see the board, then you have to change the Shares. Or maybe move the board to a different project depending on you know, who's using that board primarily. We have the Column. So we looked at Columns in the previous video, the Columns versus Statuses and how those map together.

Now Swimlanes, let me actually show you what Swimlanes look like. And actually, you know what, let me do this. Let me hop here, and let me open up Board Settings in a new tab just so we can see this right next to each other. Okay, so that I'm going to close out of some of these other tabs just clean up a little bit, so we can see a little bit easier here. And then one of these will go into the Board Settings so we can see these settings as we're making changes.

So this is the Swimlane here, right? So we can see the Swimlanes are currently based on Stories. So if we were to change this to None, then over here, you can see it automatically updates. Sometimes you need to refresh, sometimes it's automatic. Kind of depends on the setting and how quickly the server realizes the setting has been changed. But you can see what changes here.

So when we're not using a Swimlane, if we have things like Subtasks, we can see this Subtask here is for SSP-6, that's this one right here. And this is actually in a different Column, because we have the Columns mapped to the issue Statuses. So this status is To Do, which is why it's in this Column and the status of the Subtasks, even though it's linked to that story. So it's a child of that story, that status is different. So that's why it's in a different Column.

So Quick Filters, and we've looked at Quick Filters earlier, kind of briefly, that's what these are right here. But we can start to customize these too well quickly filter the issues that we see on the board. So let's say we want to see the Bugs. So let's say Bug. So this is going to be Issue type equals Bug, add that, there we go, that's been added.

Now over here, this probably need to refresh for, we'll see that Quick Filter be added. So we can filter and only see just the Bugs. Now what's cool about these is, these Filters are additive. So I

could say you know, I only want to see the Bugs that are assigned to Mary. Well, there are no Bugs assigned to Mary. So of course there's nothing there. Only the Bugs are assigned to Dan. Well, only the Bugs are assigned to Dan and Mary, right? So both of those. So these are additive things that we can start to do. So keep that in mind as you're thinking about what sort of Quick Filters you want, and what sort of ways you want to be able to access that.

And these are great things in my experience that come up in the Sprint planning meeting. Be like you know, I really wish there was a way I just want to see the Bugs. I don't want to have to filter through all these different issues, I just want to be able to see the Bugs. Okay, well, let's just add a Quick Filter to do that and make that faster. Speeding up things here and there, it all adds up and helps the team overall be more productive.

The Color Cards, there's nothing here, let me show you Priorities. Let me shift that so we can see. Okay, so now you'll start to see what the Color Cards do. It doesn't change the color of the entire card, it's just another quick way to visually see in this case, the priority level. So we're basing it based on priorities. So this one here you can see has a highest priority.

If we were to change this. Now, all of a sudden, that color card gets changed, right? So it's basically we just change the color we can change you know, whatever color we want based on that. We could base it on you know Assignee, who it's assigned to, what type of issue it is. Is it a Story or is it a Bug, you know, do that or certain query? If we want to do a Custom Query, a custom search to change the Color Cards, we can do that.

The Card layout shows what fields we can see in this view, right? So let's come in here, and let's say we want to add in Labels, okay? So just another way of organizing. So right now we can see, okay, there are no Labels on here. But if we wanted to add some, I don't know, we can Label things however we want to organize things, right? And then we can start to see that show up on the board, maybe you need to refresh that for that to update. There we go. So we can see the Labels have been added to that.

Now, some of these other settings that we have for the board, things like the Estimation, the Working days, these really affect the Reports. So things like Burndown chart, which is another Agile thing for Scrum. So, how much work is left, versus how much time is left on the Sprint? So this Sprint currently has nine days remaining, you know, how much of this still has yet to be done? And is it realistic that we think it's going to actually happen?

So right now it's based on Story points, that's an Agile thing. Again, that's completely outside the scope of this course. But just so we know, like, okay, so this here, it currently has one story point. This one here has three story points. And it looks like we actually have this on the Card layout. So we can see five story points. So this is a heavier one, that's going to be worth more. So is it realistic that we're going to be able to get that done within the next nine days?

Probably less likely to get this one done, than one that only has one story point. So that's really where this comes in and starts to change some of the Reports and start to show that or visualize that more. Same with the Working days. So with the Working days, it's basically how many days left are there in the Sprint, and are any of those days that we're actually going to be working? So

if we look at the Reports, then we can just actually come in here and look at this. So let's look at the Burndown just as an example.

So with this, we can see, okay, this is kind of the Burndown. So this is how many issues we have. This is the end of the Sprint, and this is what it's going to take; kind of the average to get to completion. These spots here are weekends, because we have Saturday and Sunday unchecked. So, we're not expecting any work to be done, there's not going to be any progress. So realistically, this is going to be essentially, the remaining values here. As we start to grow this out over the days, we would want it to be underneath this line.

So that's the basics of how that works and how we can change the Board Settings in order to customize that to our team's needs. If we need to add individual days, if there are holidays or things like that we need to take off during the Sprint, we can add those in there. So let me head back to the board over here. So this here, this is something actually that is changing. Recently, Atlassian has been making some changes to the way that fields are organized on the issues so they're more consistent.

If you're using an older version of JIRA, you may notice if you click here, it may pull up a little sidebar as opposed to this little pop up. And the fields that you see in this view, this is the Issue detail view here that this is talking about. The fields that you see here, may be driven by this. So this is kind of a legacy thing. What Atlassian has done is they've started to change the way that they are organized so it's more consistent.

So when you see it on the board, it's going to look very similar when you see it in the Backlog as opposed to when you see it in a Saved Search or a filter. Those all used to be kind of convoluted and different and controlled in different ways. And so they're trying to bring all of that together into what they're calling the Issue layout. So, it's a little bit different. And this area here is kind of a legacy thing that we're not really going to cover in this course because it is for older versions of JIRA primarily.

There are ways that you can use it in the newer version. But the new Issue layout is much better and we'll look at that later on in this course as well. And then of course we have the Roadmap. This is essentially just turning it on or off if you want to be able to turn it on or off. So that's really all that is. It's just enabling that or not. And again, we will look at Roadmaps later on in this course. This is just enabling the Roadmap for the board.

But as you can see here, because we are using issues. So we have actually issues from multiple projects on here. Because we're pulling in issues from a different project, the Roadmap isn't available. So that's something to keep in mind with some of these features too is depending on how you configure things, then some of the other features may not be available.

Okay, so to recap. In this video, we looked at some of the General settings, we looked at the Swimlanes, got an understanding for what those are. Quick Filters, how to customize those, Color Cards, Color layout, we got an idea around Estimation and Working days and all of those in side of the Board Settings for a Scrum Board.

Now in our next video, we'll be starting the process of going through essentially the same steps that we just went through. But instead of using a Scrum Board, we're going to be using Kanban Boards. Which means there will be some slight differences that we'll learn along the way. Now, if your team is not using Kanban Workflows, then feel free to skip those videos. But if you are, then I'll see you in the next video where we'll start that process.

Video: Creating a New Kanban Board

Dan: Over the past few videos, we've looked at a Scrum Agile Board. Over the next few videos, we'll be walking through very similar steps. But this time we'll be working with a Kanban Board.

Now if you're not familiar with these terms Scrum and Kanban, or the differences between them, we talked about these concepts. They're Agile concepts, and we talked about them in an earlier section. So check out that video if you want to learn more. But let's get started by creating a new Kanban Board.

So to do that, right now we're on our Your work page. We need to go to the project where we want to create this. So let's come into Projects. And then over here on the left-hand side menu, we can come over to the Boards and create a board. So here we can choose if we want to create a Scrum Board, or if we want to create a Kanban Board, and we want to do a Kanban Board.

Now we need to tell JIRA what we want to be on this board at the point that we create it. What sort of issues do we want on this board when we create the board? So either we can have the board get created with a new software project. And we looked at this relatively similar aspect when we created a new project, and then it created a board for us at the same time.

So when you create a new project, it'll create a board or you can have it create a board and create a new project at the same time. End result is essentially the same. It's just a matter of where you go to create it. If you're creating a project first and that creates the board, or you're creating the board and it creates the project. Or we can tell JIRA to create the board from an existing project.

So create it on top of whatever existing elements or entities are in that project. Or we can tell JIRA to create it from an existing Saved Filter. Now, we haven't really delved into Filters yet but we will do that later on. But we can choose that option here. For this video, I'm going to go ahead and create this from an existing project. And let's give this a name, so this would be our Sample Kanban Board.

Now we need to choose the project that we want to have the issues displayed. So we're choosing essentially here, we choose the Marketing Team, what it's going to do is have all of the issues that are in the Marketing Team project displayed on this board. And then this here is telling JIRA where the board actually lives.

Now the cool thing about this is we don't have to have just one project issues showing up on this board. We could have let's say we want some of that data that we created in an earlier video. So we could have multiple projects showing up on this board even though the board is only living in a single project. You can only live in one project. And really the key there to keep in mind for where the location is, it's going to be based on Permissions.

So who has permission to view the Marketing Team project? Well they're also going to be able to see this board. So that's something to keep in mind when you're creating a board. And that's really all there is to it. Now we go ahead and create our board and JIRA will go through the process of creating the board and filling it with the issues that are in the projects that we selected.

JIRA

Alright, so now that we have our board created, let's go ahead and move on to our next video where we'll start to get familiar with what we're looking at here.

Video: Kanban Agile Board Overview

Dan: In this video, we'll get an overview of a Kanban Agile Board here in JIRA. So this is what a Kanban Board looks like in JIRA. And let's just get familiar with what we're looking at here. So up here at the very top, we have the Breadcrumb. So this is the location of the board itself. So we have the board, we can link to that, we have a link to the project that the board lives in.

And then we also have the link to all of our projects. So we can see all the projects and just kind of see where this is located. And then we have the ability to search. So this is a Quick Filter for the issues on the board. So let's say we wanted to find anything that had the word "owner" in it. So we can see how this filters out very quickly any of the issues. So product owner, product owner, product owner. So we can very, very quickly see the issues that we have on the board are the ones that are most important to us.

And we have the ability to filter by Assignee. So we can see just the issues that are assigned to me, Dan, or we can see just the issues that are assigned to Mary. Or the cool thing about this is this is additive. So we can see just the issues that are assigned to Mary and Dan so at the same time. So we can add these different Filters together to make them even more powerful, or maybe just the issues that are Unassigned.

Now Quick Filters, that's what these are right here. And they work very similar to these Filters by Assignee. But we can customize these, and we'll look at that in our next video; how we can start to customize these. But what's really cool about these is we can go beyond just who they're assigned to. So like which issues are recently updated, which I believe recently updated. Want to check here, don't worry, we're gonna look at the Board Settings here in a second. But the recently updated means yes, so updated in the last day.

So in the last one day, something about that issue has been updated. So it looks like nothing has been updated in the last day. So you can get an idea for how you can start to really filter out the issues that you need based on what your organization's needs are. Over here on the right-hand side, we have Automation. So we're going to look at the basics of Automations more in the next section.

But we do have access to add some Automation directly on the board here. We have the ability to Star the board. So this is like favoriting or bookmarking something, think of it like that. So if we were to star this, up here, see we can say under Your work, you can see the boards. So you can see this board is under Recent. Now if I refresh, now it's starred.

So basically, it's kind of pinning it to the top there so that it's always going to be accessible. Because the recent boards that we visit are going to be of course, based on our activity. And if our organization has a lot of different Agile Boards, then the one that we're working on most or the few that we're working on most may not show up at the top, so we can always star that up there at the top. Or we can remove that if we want to. And you can see, it's no longer starred. And it's no longer starred over here.

Now over here we have Release. So because Kanban doesn't have Sprints like Scrum, instead, JIRA defaults to letting you create a new Release, which we learned about earlier in this course. They are a way of organizing different versions together. So think of releasing Version 1.0 Version 2.0, Version 3.0, all of the issues that are associated with that version can be grouped together into a Release. It's just a nice way of organizing those.

Think of it like putting those issues into a single folder. And then, you know, organizing that that way. So, if we were to create a Release, basically, what it would do is it would take all of these issues in the Done Column. Actually, let's just walk through this, I'll just show this. So let's say this is Version 2.0. We can release it, and then you can see it's going to clear out the Done Column. And then over here under Releases, I know what's going on. So here's something to keep in mind with the location of the board versus the location of the issues.

If we go back to the board here, notice that all of these issues that are on here are actually in a different project, even though the board is in the Marketing Team project. So what's happening is we released that but it actually created the release in a different project. So we need to come in, look at the project where it's located, and now we can see okay, here's our Version 2 release. These are the issues that are associated with that release, and we can see you know, some of the ones that were done that we added there.

So, that's something to keep in mind when you're working with boards. Company-Managed Projects can have issues from different boards or from different projects located on the same board. So that's something to keep in mind. But that's what the Release does. Basically it's going to clear out the Done Column and group those all together into a Release.

Next to Release, we have Share. So we can share this board with somebody else on our team. The only thing to keep in mind here is they have to have access to JIRA installation but also have access to the project. So somebody who has access to this Marketing Team project if you share it with them, they will be able to see it. If you share it with somebody outside the organization or somebody even in the organization that doesn't have access to this project, then they won't be able to see this board, of course, because they won't have permissions to do that.

And we looked at this very briefly. This is you know, the three dots where we can go in and go to the Board Settings and we'll go into more of the Board Settings later on. But that's just where you can access that over there.

Okay, so in this video, we got an overview of a Kanban Agile Board as well as a quick rundown of an example Workflow, releasing those issues and seeing where the release is. We also noticed that the release for a board in a different project is going to release those with the project where the issues are actually located instead of here in this project where the board is located.

Alright. So in our next video, we're going to go through some of the settings to see how we can start to customize our Kanban Board. See you there.

Video: Customizing Kanban Board

Dan: In our last video, we got an overview of a Kanban Board. In this video, we'll look at some of the ways we can customize that board. Alright, so let's hop into our Board Settings. And in here, we can do things like change the name of the board if we wanted to, we could change the location. So if we wanted to move it to a different project, we could move that in there.

We can also edit the query. And this is really what I want to focus on is the Filter Query. So the Filter Query determines what issues we see on the board, right? So let's edit this. And when we make a change to this, that's going to determine what issues we see on the board. So right now, this is a list of all the issues that are on our Kanban Board.

So what if we said you know what, I don't want to see all of these, I only want to see maybe the Bugs. Select that, make sure to save. And now if we go back to the board, we can see only the Bugs. And actually, this might be a little bit easier if we split our screen here. So we can have the settings on one side, and then we can actually see what it does to the board, I'm going to collapse this.

So keyboard shortcut would be the open bracket, or we can just collapse these to see a little bit easier. So we can see the changes as we're making them. Let's hop back into the query here. So we've filtered all of these based on just the type of the issue, we haven't deleted any of those issues. And this is probably one of the biggest questions that I get from people who are new to JIRA, it's a bit of an abstract concept. Because, when you are only working on the board, you think these issues actually live on that board. That's not really true.

They live in the project. In this case, they live in this Sample Scrum Project, you can see the key there that they live in. But the filter determines what gets displayed on the board. So the board is just displaying the issues that our filter finds. So if we were to say, you know what I want to bring this down, we'll say okay, All types, but I only want things that are in the Marketing Team project.

If you notice, all of these are actually in the sample. So there's really no issues here. But if we save this, and then come back over to the board, all of a sudden, everything disappears. We didn't delete anything, we didn't delete any of those issues, those issues still exist. They're just not in the Marketing Team project. So when we're filtering by the project, and there are no issues in that project, well, it's going to look like everything got deleted.

And so of course, this is something where if you're a JIRA administrator, you're probably going to get some comments be like, "Hey, where'd everything go, everything got deleted, it's no longer on the board". I've had some people in my organizations who have been very concerned that something actually got deleted, but no it didn't get deleted, it just is no longer visible because of the filter. And usually what happens is somebody went in and changed the filter, and I need to go back and fix that for them.

Okay, so let's bring some of our issues back here, I'm going to bring back the issues that were in that sample project. So we can see more things on our board here. And let's hop back into the

Board Settings, and come back into the board. Go back into the Board Settings, there we go. And let's take a look at some of these other settings that we have here.

So we have our Columns. And we looked at these when we looked at the Columns for both the Team-Managed Project as well as the Scrum project. So if you've watched both of those, you're familiar with this concept and how it works. Basically, what we're doing here is we are mapping the status of issues to the Column on the board itself. So the issues themselves, if we look at one of these issues, this is the status of that issue.

So this issue is currently being displayed in the To Do Column, because it has a status of To Do. And I realized those are called the same thing, right? But we could change it if we wanted to, we could say you know this is called Not Started. And that's going to affect the board over here. Once we refresh, we can see it's going to change that. But it's not going to change the status of the issue itself because the status is still that way.

So the board, again, it's really just kind of mapping things. So it's using the filter to map what issues we see. It's using this Column to status in order to map where the issues are displayed on the board. And it's using some other things to determine how that display is done. So Swimlanes would be a great example of that.

So Swimlanes are another Agile concept. So right now these Swimlanes are based on this particular query here, but let's just switch this to something like stories very quickly, so we can see what changes here. So we can see all of a sudden, we get these Swimlanes and things are organized differently on the board. So we can see these stories that have Subtasks. Now our little drop down, and then everything else is not.

So these stories here, they do not have Subtasks. That's why they don't get their own Swimlane. You can see, it's going to group Subtasks under their parent issue. Issues without Subtasks will be shown in their own group at the bottom. So that's really what it's doing here. Again, this is just another visual way of being able to see the information.

So we have the Filters that are telling JIRA what issues to show, we have the Swimlanes, we have the Columns, telling JIRA where to map those based on the status of the issue. And then we can go beyond that and organize things based on maybe stories or maybe we want to organize it based on if we had Epics or Assignees, we could do that. So who is it assigned to?

So these are the issues assigned to myself to Dan, these are the issues assigned to Mary, all the issues that are unassigned, it's a very similar concept to using these up here. It's just another way of visually organizing that data. There's not really a right or wrong when it comes to using Swimlanes.

It's based on what is best for your team, your organization, or whoever is using this board, and what they find the easiest way to organize that. Or if we want to, we can always come in turn these off completely, and then you know, we won't have any Swimlanes there at all.

Next, we have the Quick Filter. So we looked at this briefly, or we mentioned this briefly in the last video, these are the Quick Filters here. We could come in and customize this if we wanted

to. So let's say yeah, you know, we want to only be able to see the Bugs, right? So the query for this will be issue, you can start to see it fills it out. So it's actually Issue type equals, and then Bug, add that. Now once that's added, this will probably need to refresh the board to that button show up there. But now we can filter based on the Bugs. And what's cool about this, again, it's additive.

So we can say you know what, I only want to see the Bugs that Mary is working on. Okay, there's currently not any on the board. Well I only want to see the Bugs that Dan is working on. That's the only Bug that Dan is working on that's on the board. So you can start to see how these Filters can be additive to really help hone down and really focus on seeing only the information you need to see and blocking out all of that clutter overall.

That's really helpful when you have multiple people working from the same board. Everybody can see all of the information. But from a day-to-day, maybe you know, I only really need to focus on just this one issue, or just the issues, the Bugs that are assigned to me. So I don't really need to see all of that other stuff, day-to-day. So I can block out all that clutter and really focus on just what I need to work on.

Moving along here in the settings, we have the Card colors. So, it's not going to change the color of the entire card. But let's say we want to do it based on Priorities; you can start to see how it changes this. So this one here is a lower priority, so it changes it. Or if we wanted to switch this priority level, we could say you know what, let's actually switch this, I don't want to actually pin that I wanted to change this. That pins it up to the very top here. Let's say I want to change the priority level to highest. Now it's red, so we can see okay, that's the highest.

Again, it's just a visual way of being able to see whatever it is that we're basing the colors on. So it could be Priorities. That's a very common one that I've used when I worked with teams, it could be Assignee, you can do your own Custom Query if you wanted to, in order to determine those colors.

The Card layout tells JIRA what sort of extra features you want to see on the card itself. So on this card, what do you want to see? Let's say we want to see, maybe our Labels. So let's add that in. And then over here on the board, you can see you know, there's no Label here on a lot of these. This one has a Label, it looks like let's say, you know, let's add a Label to this one.

This is kind of duplicating, because we could use the Priority instead. But you get the idea of how this works with the Labels and then it's going to show up on here. I didn't actually add it. I keep pinning that. Let's go ahead and add this. Actually, you know, let's just change this. Let's say this is a Windows issue, right? So this is a Windows 10 thing, so we can add that Label.

Once we've added that, let's close out of this. We can see it's been added here so we can start to organize some of that information that we see on the Columns themselves. Or we can remove that if we want to. Just helps to add the information you need or declutter from information you don't need.

The Working days tells JIRA really it's mostly based in the Reports, being able to see how well things are going. So what are the days that we're working, and then based on that, it's going to

help to determine some estimations and things like that really in the Reports. So if we're not working on Saturday and Sunday, then JIRA is not going to assume in the Reports that hours are going to be put into any of that. So that's just something to keep in mind when you're working for Reports, if you notice the Reports are not quite right, you may want to check the Working days on the board to make sure that that is set up properly.

Then we have the Issue detail view. So we're not really going to cover this in this particular course, because this is kind of outside the scope. The biggest reason for that is because recently Atlassian has been making some changes to the way the fields are organized on issues. So they're more consistent.

The older versions of JIRA used to have the way that this looked when you pop this up, would be controlled here on the board. But then the way that an issue looked when you were looking at it in the List view or in you know, somewhere else, it would be controlled elsewhere. And really Atlassian is trying to take all of those and have them in a single place so it's more cohesive and more consistent.

So, if you are using an older version of JIRA, you may need to come in here and make some customizations to this to get this to look different here. But for our purposes, because we're using a newer version with JIRA Software on Cloud, then we're not really going to focus on that too much here.

The Roadmap here. So one thing to keep in mind here is because this is designed for single projects, we're not using any issues that are actually on the Marketing Team, even though the board is in the Marketing Team, we'll look at Roadmaps later on in this course. But here we have the ability to enable this or disable. You can see on the menu here, being able to enable or disable that from the menu for this board.

Alrighty, so I know we've covered a ton. But to recap, we looked in this video, we got an overview of some of the settings. We looked at the Filters, how those drive the issues that are on the board, we looked at the Columns to see how JIRA uses that to map the issue status to where it's displayed on the board. As well as looking at a lot of these other Board Settings.

I would encourage you to take some time in between videos to play around with some of these settings and start getting an idea for how you might use them in your organization. Now so far, we've mostly been working with some of the sample data that JIRA created for us when we made our Agile Board. So in our next video, we'll look at how we can create our own issues.

Video: Creating Issues

Dan: In this video, we'll learn how to create issues in JIRA. Since this is something we'll be doing a lot of inside of JIRA from day to day, fortunately, it's really easy to do. What I want you to do is to come up to the Create button up here, or we can hit the keyboard shortcut C on the keyboard in order to create an issue.

Once we do that, then all we need to do is to tell JIRA where we wanted this issue to be created. So what project, let's leave it in the Marketing Team project. And then we tell it the Issue type. So we've looked at Issue types so far throughout this course, and these are the Issue types that are in the Marketing Team project.

So the Issue types that we see here are based on the project selection. So if we were to switch to a different project, you can see we have a different type of issue in here. So that's one thing to keep in mind is think of it kind of like from top- down, right? So first, we picked a project that determines the Issue type, the Issue type determines all of the fields that we see here. So a Story might have different fields than an Epic, right, you can see how those fields change.

All of these are controlled by the JIRA administrator. So if you don't see a field on here, you want some data that you want to be able to organize or whatever that may be, contact your JIRA administrator. Or, if you are the JIRA administrator, we'll look at how we can create Custom Fields and organize things on here. But just keep that in mind. It kind of works from a top-down process.

So let's say we switch this to a Bug, let's give this a name. So this will be say our Survey for next month's social campaign is broken. And then we can give it a description on that link. The link took me to 404. And then you could come in and start to add extra things if you want to add an attachment.

If you aren't working with Bugs, of course, Attachments and Screenshots are really helpful, you can add all of that in there. Then once you're happy with it, let's go ahead and create the issue. And that's really all there is to it. Once we've created that, we can click on this to go to what JIRA calls the Issue detail view. So to recap, creating an issue is super easy.

All we need to do is to hit the Create button at the top, or hit the keyboard shortcut C in order to create a new issue, fill out the fields that we want, hit create and that issue will be created. Now in our next video, we're going to take a few minutes to get familiar with this view once we already have an issue created. See you there.

Video: Overview of the Issue detail view

Dan: In this video, we'll get an overview of the Issue detail view here in JIRA. Alright, so let's get started from the top left and work our way down. At the very top, we have the Breadcrumb. This is similar to what we saw when we're looking at the Agile Board. So we have the link to this particular issue. You can see we can just copy that link to the clipboard and then share that with whoever we want.

Of course, they have to have access to the project or being able to view the issues in this project to be able to actually see this. But it's quick way to copy that and share that with your team. We have the link to the project itself, which is where this issue lives. And then of course, the link to all projects. So, this Breadcrumb is always a nice way to be able to kind of get a sense for where you are at inside of JIRA.

Beneath that we have the Summary of the issue. So think of this as the title. JIRA calls it the Summary; we can just click in here in order to change that if we want to. Beneath that we have the ability to add an attachment. So this will pop up a dialog to browse your computer to find an attachment to add to this issue. We can create a Subtask if we want to where this issue is showing up.

So where is it broken, we can do that, add those Subtasks if we want to, that will be added automatically under there. And then we can see how this kind of hierarchy between the, in this case the Bug or the Issue type, and then the Subtasks. Underneath that you can see how we can start to visualize that beneath the issue itself. So we can link these issues to another issue if there's something associated to it.

So if we wanted to link this, we could say you know what, this is actually blocked by one of these others. So let's say you know, this one here, we can't work on this issue until we get this one resolved. We can start to organize. The day-to-day Workflow can be really complex, one Bug might block another one, or one story might block another one, there might be some of these blocks here we can start to see okay, well, we can't really start working on this until this one is done. So let's see the progress on this one, and so on and so forth.

And that's just for blocking, there are a lot of different links that we can do. And as a JIRA administrator, we can control these links, we can create our own custom ones if we wanted to. Next to that, we can add a web link if we want to, you know, just add a URL to this. Or if we have apps or third-party plugins, we can see some of those start to show up here. Over here, on the right side, we have the status of this issue.

So right now it is To Do, if it's on an Agile Board as being dragged over, we saw earlier how this issue status maps to Columns on Agile Board. So this may change based on that. This is basically just kind of feedback for Atlassian, we can see who is watching this issue.

So this controls kind of who is going to get notifications, you can add yourself to this. If you have administrative permissions, you can add other people to this so that they'll start getting notifications for this. This is Voting. So as far as features, way I've seen this used is you know, if

there's a new feature you can have internal voting on that. Basically like it and see for which issues are kind of rising to the top there. And then we have the ability to Share, we kind of saw that with just copying the link. But we could share this directly if we wanted to with somebody else on our team.

And there are a lot more things that we can do in here, you know, being able to move this, clone the issue, delete the issue, even exporting it to, you know, an XML file or printing it out or whatever we may want to do, we can find that in there. Over here we have the fields for this issue. Okay, so currently we can see that kind of the key ones here. So the details being who is assigned to, Labels, the priority level. But there are some more down here that we have access to.

What fields we see on here are going to be determined by the setting for the issue view, right? So we kind of looked at this a little bit earlier, there was kind of a legacy view in the way that this is displayed for Agile Boards. But there's also a place where we can go to customize the fields that we see on here. And we'll look at that later on in this course but just know that if you don't see a field on here, you can always come in here and find your field to find out why it's not showing up.

If you have project administration or project administrative permissions or JIRA administrative permissions, then you can come in here and start to customize some of this, which ones you actually have permission to do will be determined on how it's all set up. Just because you have project administrative permissions doesn't necessarily mean that your JIRA administrator allows you to customize a lot of that. So if you are having issues, reach out to your JIRA administrator, and they can customize the fields that you see on here.

The last thing I want to point out about these issues, or the fields rather on the issue here is that we can pin them. So if for example, you know, a lot of times we are using the Time tracking element, we might want to pin that up here to the top so that we don't have to open this up every single time, right? So it's just a nice way to be able to surface the things that are of the highest priority to us for these issues.

Then, of course, we can come in and unpin them if you want to, to drop them back down to where they normally live. And then down here at the bottom, we have the ability to interact with these issues. So we could come in here and you know, add a comment, if we wanted to tag somebody, to give them a notification of something, you check this out, send that and then you know, Mary's going to get a notification. And you can start to see the comments on this issue and really get a sense for what's being worked on.

Not only that, but we can also see the history of it. So we can see who is making changes to this. So you can see as I made those changes throughout this video, JIRA is keeping a track of that history, okay? So that's a little different than the Worklog. The Worklog is if we come in here, and log work to it.

So, JIRA does not have by default, unless you know, there are third party apps where you can do this. But by default, JIRA does not have built in Time tracking, you have to come in here and say, I have spent, you know, an hour on this. And I looked at where the issue was, found out it

was in Facebook, whatever, you know, what's the description of what you did, you can log that work. And now this is something that can be seen in here. And of course, that also affects the Time tracking on this, and really starts to affect some of the Reports and you know, where that time is being spent.

All right. So to recap, the Issue detail view is an important screen filled with all the fields and information we need for each issue. And when you're working on an issue, I found it's helpful to have this page open in a browser tab. And then whatever you're working on maybe in another browser or on another monitor if you have that in order to be able to get your work done, but also keep tabs on what's going on with the issuer or make any comments that you may need to or add attachments or do whatever you may need to in order to interact with the rest of your team and make sure that work is being done productively.

This will be a page that you'll want to get familiar with. So I'd encourage you to open up this view in your own JIRA installation, see how it's organized in there, there may be some different fields that you have access to. There may be some different, if there are third party apps in your JIRA installation, then you may see a few different things in here. Just get familiar with this view in your organization's JIRA installation.

When you're ready, I will join you in the next video where we'll look at how we can save searches for quick access later on.

Video: Creating Filters

Dan: In this video, we'll learn how to work with Filters. So Filters are what JIRA calls Saved Searches. The first thing we need know before we dive into this is, what information are we trying to find?

So let's say we're trying to find all the Bugs in the Marketing Team. So that way we can add that to a board or something like that. Okay, so to do that, let's come in and start our search. So let's go into our Advanced Search. And there are a few things we can do. For this, since this is a simple example, we could come in and say, I just want everything in the Marketing Team that is a Bug, right? So that's going to filter all of that out using just these dropdowns here, and there's a lot more that we have, right, so a ton of different things.

Each of these are a field and these are all the prebuilt fields that come with JIRA, we'll look at creating Custom Fields later on. But just know that when you create a Custom Field, it's going to show up in here so that we can actually customize our filter based on that Custom Field.

So really, the sky is the limit when it comes to being able to organize this information to find what we need. And that's really the key of it is, as your company is working inside of JIRA, there's going to be a ton of issues that get created. So, these Filters really help surface the most important things that your team need to know right away.

Now another way that we can create this issue here, let's go ahead and clear this out. Switch this back to All Issues. And then we can come into the JG query, right. So this is more of an advanced way of searching. And then we just come in and type this out. So depending on what we're looking for, if we can't find it in the dropdowns, the basic search view, then we could come in and do something a little more advanced.

So let's say Issue type. And I really like that it has this like IntelliSense type feature to say, okay, you're looking for Issue types, well, these are the Issue types that you have available, which one do you want, okay? Well, you can just select from that, or you could type it out however you want. And I want the project to be the Marketing Team. So put that in quotes, because there's a space in there. And then we're just going to order that by and you know, when it was created, descending.

So we really only have one issue in here, because we've only created one Bug throughout this course. But you can start to see how we can customize our Filters to find the issues that we want. Once we have found the issues we want, now we need to come in here and save this and say this filter is going to be Marketing Bugs. There we go.

Now we have saved this filter. So you can see it shows up over here on the left-hand side because it starred. Also, it's going to show up here under the drop down here. So it's recent, if I refresh, because it starred, you'll see it'll kind of pin it to the top there so we can always access that, a very fast way of being able to access this filter.

If at any time you're looking for a filter and you know, it's not starred, it doesn't show up in here, because you've looked at some other ones, you can go to View All Filters, and you can start to filter the filters even more so. So you can say I knew it had something to do with Bugs, so let's look for that. Okay, there it is. Okay, now I can star this, and now it's going to show up here at the top in the menu because I've starred that filter. And then just click on it, and it's going to take us right back in order to see that.

Now what's cool about this is we can actually take this to the next level. Now that we have a filter built, we can start to use this in some other things. So we looked at how we can customize the filter for an Agile Board earlier in this section. Well, we could use this filter if we wanted to. We saw when we created a new board it was like do you want to use an existing filter instead of an existing project?

Well, we could use this filter if we wanted to build a board around this search. Now right now we don't really have a lot. Let's switch back to our basic so we can see it automatically remembered based on our query. Okay, this is a simple one. So we could have done this really in the Basic view. But we can see it already has these selected based on the search that we have. Let's come in and let's add the Scrum project as well so we can get all of the Bugs or even we could come in and just say you know what I want to clear all of those, I want to find all the Bugs across our JIRA Installation, right?

So now, if we save this, now this is saved. And we're seeing all of the Bugs. Of course, we may want to come in and edit this now that it's all Bugs, not just Marketing Bugs. There's really not a way to do that here. So let's come into the Filters to change the name of it, I should say. And let's just call this, there we go. Save that. And now we've changed that name.

Okay, so to recap, the Filters are essentially Saved Searches. And the power in the Filters really comes with what we can do with them. We can use them for our Agile Boards, but there are other places we can use them, for example, Dashboards. Now, we haven't really looked at Dashboards yet. So let's move on to our next video. We will take a look at another way that we can use Filters in Dashboards.

Video: Using Dashboard

Dan: In this video, we'll look at how to create a Dashboard. So the process of creating a Dashboard is pretty straightforward. Just come up to Dashboards, Create Dashboard. And let's give this a name. So let's say this is our Marketing Teams Dashboard.

Now when you create a Dashboard, usually it's going to be shared with other team members. However, you can create a Dashboard just for yourself if you want. Or if you want to share it with others, the permissions here are important. So either you could share it with a project. So what this means is anybody who has access to one of the projects will also have access to the Dashboard.

So if anybody you know who has access to the Marketing Team project also has access to this Dashboard. Or we can choose a group. Now the groups are going to be set up by your JIRA administrator. And if you are the administrator, we'll look at setting up groups later on in this course when you go through that. But you can see right here, there's really only one this particular group is a default one that's set up by JIRA itself when you first set up your installation. But, you may see more in here, depending on your organization.

The groups are something that the JIRA administrator can control. But you can share them easily with that group if you want to. Or, you can say, My Organization. So anybody who has access to your JIRA installation can have access to the Dashboard. Or, of course, we can just make it just our own.

In this case, what I'm going to do is come into the project, and anybody who has access to the Marketing Team project, let's go ahead and add that. As a JIRA administrator, I get a lot of things where you know, a manager or team leader will create a Dashboard for their team, and they're like, it's not working, they can't see it. Well, when they select this, they just hit Save. And that's not going to work, you actually have to hit Add in order to add this to the Shares. And then hit Save.

Okay, so now that we have the Dashboard created, now it's time to populate this Dashboard with whatever it is that we want. So on Dashboards are things called Gadgets, right? Actually, before we get to Gadgets, I do want to point out, you can see this layout here where we have Gadget here, Gadget here, we can change that layout. So we could have you know, just one across, there's just a few different layouts that we can have. And then the process of editing, this is really just coming in, let's add a Gadget, we can pick from whatever we want.

So sometimes it takes a minute for these to load in and we can load all of them there. One of my favorites is probably something as simple as like the Filter Results. Let's add that. Let's also add maybe a Pie Chart. We're not going to go through all of these, you can see there are a ton of Gadgets that we have. I encourage you to come in here and take a look at some of these just to see which ones would be helpful for your team.

You know, I've worked with teams where they're working on a Sprint and have a Gadget like this displayed on a monitor in the team office with something like you know, the days remaining, the

Burndown chart. There's a Burndown chart in here. If you're working with that, being able to visualize this very, very easily, can be helpful with Dashboards. Let's close out of this once we're done adding our Gadgets.

Now we need to choose. Okay, we have two Gadgets here, let me take this one and move it over here so we can see these side by side. So we have Filter Results and we have the Pie Chart. So just like with boards, Gadgets are based on Filters. So hopefully you can start to see kind of a commonality here where a lot of things in JIRA are based on, you have the issues that live in the projects, and then you have the Filters that decide what group of issues you're going to be looking at. And then things like the Gadgets on the Dashboard and the boards, the Agile Boards themselves use those Filters to determine which issues get shown.

So let's find a filter here, let's say maybe our Bugs filter that we just created a little bit ago. Let's save this. So you can see what this is doing. And for this one, let's maybe change this to be a little bit different. So maybe this is going to be our Sample Scrum Project. All of the issues from that project and the statistic that we want to see in the Pie Chart, let's have that be the status. There we go.

So here we can see okay, these are all the issues in that project and you can start to see okay, 34% of them are To Do, 17 In Progress, you can start to see really how helpful this can be. And you can use really any filter that you want. So the sky is the limit as far as creating that filter to display the issues you want. And then you saw how we can choose this. We can choose what the stat is that we want to track. And these stats are fields, right?

So the cool thing about this is when you create Custom Fields, and we'll get to creating Custom Fields, when we get into the administrative section, when we create Custom Fields or when your JIRA administrator creates Custom Fields for you, you can use those statistics on your Dashboard. So you can really start to hone in on exactly what it is you need to see, on exactly what it is your team needs to see.

Speaking of team, let's see what this Dashboard looks like for someone else on our team. So let's pull over, I have another window here where we are logged in as Mary on our team. So let's see what this looks like. Let's go over to Dashboards. This is under More just because the screen is a little bit smaller, make it a little bit bigger. So let's go to the Marketing Team Dashboard. And we can see, wait a minute, some of these aren't working. This is not working here.

And at this point as your administrator, this is usually when I'm going to get a call from the manager, whoever set up this Dashboard, saying; "Why can't people on my team see things on the Dashboard?" Sometimes it's just one of them, or sometimes it's all of them. They'll set up all these Gadgets, everything looks great on their end, and then they share it with their team and they're like, "Huh, okay, things aren't working".

And I know we did set up the shares properly, you saw that we set them up for the Dashboard to be shared with anybody in the Marketing Team. And it's not entirely intuitive, what's going on here. But this is one of those things that makes sense after you know how it works. But tell you

JIRA

what, this video is starting to run a little bit long. So let's actually move on to our next video where we'll look at how to fix this.

Video: Sharing Filters

Dan: In our last video, we created a Dashboard and set up a filter on the Dashboard with our Gadgets. But when we tested it for our team, it didn't work, it looked like this. But if you recall, we shared the Dashboard with our team, and we did that properly. So why are we getting this error?

Well, the reason for this is because there's actually two sets of permissions that you need to keep in mind when working with Dashboards. You see, there's the Dashboard itself, and that's what we set up in the previous video, we set that up properly. And then there's the permissions of the Filters that we're using in the Gadgets on our Dashboard. That is why we're getting this error on only one of the Gadgets, this one right here.

So Mary has permission to see the filter that we're using for this Pie Chart. But she does not have permission to see the filter being used for this Filter Results Gadget on the Dashboard. That's why she's seeing this error. So to fix this, what we need to do is to go back, let's move Mary's window out of the way here.

Somebody who has access to that filter, the Manager, Team Leader, whoever set this up the JIRA administrator, somebody who has permission to see that filter needs to share that with Mary or the team or the organization or whoever is coming across that error. So to do that, let's come up to Filters, and go to View All Filters, and then find the one that we are using.

So that's this one here, you remember the All Bugs filter that we created earlier in this course. And you can see the access is private, which means that logged in is Dan, I'm the only one that's able to see this. That's why Mary can't see it. And that's why they're seeing that error showing up on the Dashboard.

So what we need to do is to change this so that we can change the permissions on this. So again, this goes back to what kind of what we talked about in the previous video. So either pick some project, and then whoever has access to that project will be able to see this Dashboard. Or we can do a group.

So the groups again are something that's going to be set up by the JIRA administrator, and how those are organized, and what they're called, who's in those completely up to the JIRA administrator, we will look at creating those later on in this course. But you can see those here, or my organization which going to be you can see right here, any user that has access to our JIRA installation to the entire organization will be able to see this Dashboard.

In this case, let's come in and let's set this the same as the Dashboard itself. So anybody who has access to the Marketing Team will be able to see this filter. And just like with the Dashboard with the way this interface is for sharing, I'll say this again, because I've had a lot of people, Managers and Team Leaders come to me like I shared it, but it didn't work.

Well really what happened was they hit Save, and you actually have to hit Add first. You have to add that, and then hit Save. And now you can see the access has changed. So if we hop back over

to Mary's, and refresh, now she can see this filter, and now she can see the Gadget displaying on the Dashboard. And there we go.

So remember, anytime you create a filter, if you want it to be seen by someone on your team, you're going to have to make sure that the permissions for the filter are correct. Otherwise, they're going to get an error trying to view it, including viewing the filter through anything else like a Gadget on the Dashboard.

So to recap, in the last couple of videos, we looked at how to create a Dashboard, we got an overview of them, adding Gadgets to it, sharing it with our team, and then we looked at adjusting the layout and even having the filter being displayed on a Gadgets Dashboard. Then of course, we saw that the permissions were not correct for that filter, and then we learned how to fix that by sharing the filter with our team.

Now in our next video, we'll look at where we can go to get Reports in JIRA.

Video: Finding Reports

Dan: In this video, we'll look at where we can find Reports in JIRA. Now, I do want to point out for this course, obviously, I'm not using a long-time active version of JIRA. I mean, we just created some of the first issues earlier in this course. So, my Reports for this JIRA installation are going to look kind of funny, mostly empty. But there are a couple places where we can go to find Reports depending on what our needs are for our team.

The first is on the Agile Board. So let's hop into a project here. And yeah, okay, we're on the Sample Scrum Board. Let's start with the Scrum report. So, we go into Reports, we can see all the Reports here for our Scrum Board. And these are broken down into five key sections, the first being Agile. And if you're familiar with Agile methodology, then you'll find all the Reports that you're familiar with here; the Burndown charts, the Velocity Charts, your Sprint Reports and so on.

Beneath the Agile Reports, we have the DevOps Reports and I do want to point out over here on the left side menu, we also have them broken down into the same sort of categories. And you'll notice that this DevOps report is new as of this recording as I'm recording this. And because Atlassian chose to break that out into its own section, I would not be surprised if we start to see more Reports get added to this DevOps section here.

The Issue Analysis Reports are more general Reports for the issues in your project or your filter, like the Boards Filter. For example, the Average Age Report is one that will give you an idea for how long issues are open. So in the past 30 days, you can set that here. How long are issues open before they are completed or before they are resolved? So you can see again, it's pretty empty in here. But you can start to see okay, the average age currently is two days. From the time an issue was opened to the time it's resolved, the average age across that project or filter is two days.

So you can start to see how some of these Reports can really help you track how long things are opened for if there are you know, things outstanding that we need to fix. If we head back to All Reports, and scroll down, we'll find the Forecast and Management Reports. These Reports are great to help you try to predict the future as much as one can expect to do so. For example, even though there is not automatic Time tracking built into JIRA by default, you can use this Time tracking report to see how well your team is doing at estimating the times for their Sprints.

So, we earlier looked at how you can log work on to an issue or you can also on an issue, you can say this is how long I think it's going to take, you know, the estimated amount of time. So if you estimate a User Story is going to take three hours to complete, and then it ends up taking six hours based on the time that's logged on there, this report can start to surface some of that information. Again, it goes back to the Agile concept of iterative improvement.

So what went well, what didn't go well, if there's an issue that took twice the amount of time we thought, then we can start to have that conversation and find where some of those roadblocks were that caused that to happen, and then break those roadblocks down for the next Sprint.

Now, if you're not using Scrum, then you won't have quite the same report, but they are located in the same place. So we go back to our project here. Let's shift to the Kanban Board. I want to focus mostly on the Agile here, this is going to be the primary difference. Right? So if you go to our Kanban Board, and then go to the Reports, you'll see most of these Reports are the same. So Issue Analysis, Forecast Management, the DevOps. really the key difference here is the Agile Reports.

We don't have a lot of those, obviously, Kanban doesn't have Sprint, so we're not going to have a Sprint Report. Right? So it makes sense that Kanban Reports are not going to be the same as Scrum Report. Now something else to keep in mind when it comes to reporting in JIRA is Team-Managed Projects do have Reports but they're not to the level of Reports that we have in Company-Managed Project. So let me show you what I mean here. So let's hop into our Team-Managed Project.

I believe it was this one and go to View All projects and see yeah, type Team-Managed Project. It's this one here. So let's hop in here. And it looks like we do not have Reports activated. So let's come into our Features, Turn on Reports, and we can see the Reports that we have for Team-Managed Project. In this case, you know, our project isn't even using Sprints and some of these Reports aren't active, we can't even open those up.

So, that is something to keep in mind with Team-Managed Projects is the number of Reports that we have, you'll notice these Reports are pretty similar to the Reports that we had in the Kanban Board for the Kanban Agile Board. But we don't have a lot of those other Reports that are in the Company-Managed Projects. So that is something to keep in mind when you actually create the project. Because as we learned earlier, when you create a project, you cannot convert it from a Team-Managed Project to a Company-Managed Project, or vice versa. So depending on the reporting levels that you need, that's something to keep in mind when you actually create the project.

Now the last thing I want to point out is there is a way that you can generate your own Reports using Excel using data that you export out of JIRA. So to do that, we come up here, let's go into Search. And same as what we went through earlier in this course where you know, we can search for whatever we want in order to essentially walk through the same process as when we created the filter, right? That same process.

Let's say we want all of the Bugs. So that's going to be our key thing is we want all of the Bugs. Now we can export this up here on the top right, either to Google Sheets, or to Excel, it's kind of depending on your preference there. Once we export this, so allow that and exports, let this Save and then open this up. I opened up on a different monitor, let me pull this over here.

So we can see this data that gets exported. And now we can come in here and start to use this however we want inside of Excel, generating our Reports using Excel's capabilities to create Reports. But you'll notice some of these are actually empty, so like the Due date is empty. And maybe we don't really need to know when it was created. Or maybe there is some other information that we need on here that does not get exported.

So, the thing to know about this when you're exporting is the data that gets exported, is based on the Columns that we have. So let's switch over to our List view, as it's easier to see. So these here are fields that are on the issues. And remember the fields are what holds the data. And these fields are what are going to be exported when we export this to Excel. So we can change this.

If we say you know what, I don't need the Due dates, because that's not really something we're tracking for these Bugs. But you know what, I do need to include the Description, I need to include maybe the Labels, whatever information it is that we need to include there. And now if we come in here, and we export this, let's save this. And we can see that that data that we have is going to be included now.

Now we have the Description, now we have the Labels. And so we can really get a fine level of control over what data gets exported, and then pull it into Excel to generate whatever sort of Custom Reports that we might need. All right. Now in our next video, we're going to shift gears a little bit to get an overview of Roadmaps in JIRA. See you there.

Video: Roadmaps in JIRA

Dan: In this video we'll get an overview of Roadmaps in JIRA. Alright, so let's come into our project here and come up to Roadmap and we're going to see an error. So the reason for this is because if you recall, we are in the Marketing Team project here. But when we set up our board in the Marketing Team project, we're actually pulling in issues from a different project.

So that's the first thing to know about Roadmaps is they only work in the same project where your issues live. Okay, so let's hop over to where our issues actually live in this JIRA installation, which is mostly in this sample project, where we had JIRA generate a bunch of those issues. So now if we come into our Roadmap, we can see the actual Roadmap here, it's pretty empty. Let's create an Epic.

So let's say that Epic will be to complete the JIRA course. Maybe another one to actually take what you've learned and implement new JIRA skills. So you can see as I'm creating those Epics, then JIRA is assigning numbers to them, which basically, it's actually creating those issues. And we can come in here and we can add in child issues. So if you remember the hierarchy that we learned about earlier in an earlier video where we learned about Epics and user stories, or really any other Issue type, there's different Issue types we could create here.

But those are going to live under the Epic. So we can say maybe finish Section 1, Section 2, Section 3, you get the idea. We can add some under this as well. Maybe something like you know, decide if Company-Managed or Team-Managed Projects are right for us. You know, you can make that decision, or maybe kind of what we were looking at, in the last video, review the data in our orbs Reports, to see what we need to track, whatever sort of issues that you want to have under those Epics.

And then what happens here in the Roadmap is we can start to track some of that. So you can see we already have a Sprint on here. So this was a Sprint that we created earlier in this course. And we could say, you know what, this one here, let's drop that into that Sprint. So right now JIRA is going to say, you know what, that scope has now been changed because this Sprint is actually active. And so what we learned earlier with Sprint is in your Sprint planning meeting, you're going to decide how much work gets done, or what work gets done in that Sprint.

So say this Sprint is two weeks long, what work are we going to get done in the next two weeks? Then throughout that two weeks, ideally, you're not going to add anything else to that because you've already decided how much work is going to get done. So if you do that in an active Sprint, then JIRA is going to give you a notification and say, "Hey, the scope is changing so you should probably go in and remove something else".

That way, you're not trying to get three or four weeks' worth of work done in two weeks, that's just setting yourself and your team up for failure. But you'll notice here because we are working with Sprints, and we're working with Scrum, I can't add issues anywhere else. The reason for that is because we can only add things into Sprints, we don't have any other Sprints. So let's come in here and let's create a new Sprint real quick.

Doesn't have to be active, but we could add in a future one. Let's say we're going to start this one on the 30th and then have it be two weeks. Let's update that. So now if we come into our Roadmap, we'll see that on our Roadmap. So now we can say okay, well we're finished Section 1 in this, finish Section 2 in this one here, maybe Section 3 as well.

You can start to see how we can start to organize these things in the future and that's really where the Roadmaps are helpful is not only in the future as you're doing this. Of course you're going to see things you know as they're completed. But you really get a kind of a different visual sense for what is getting completed and where.

And then on the Epic itself you can see the issues in there, you can hop to those you know just like any other issue you know, have your comments, being able to interact with your team to see how things are doing, how things are going. You can start to see you know, maybe this one is In Progress so you can start to see the progress for the overall Epic, right?

So we can see that, you know, as this one's done, okay, now, one out of three, it's 33% done. So we can start to see the overall progress on our bigger projects. You remember Epics are bigger projects and the Roadmap is really a great way to be able to visualize those and the work being done. Now I do want to point out if you are using JIRA Software Premium as we learned earlier in this course, there is a more advanced version of Roadmaps, but that is an additional cost. And, again, as I mentioned, I am not using Premium in this course I'm using JIRA Software.

Okay, great. I would encourage you to take some time to play around with Roadmaps and get an idea for how your organization can use them. And when you're ready, I'll see you in the next video where we'll look at how we can create issues in bulk. See you there.

Video: Creating Issues in Bulk

Dan: In this video, we'll look at creating issues in bulk. So to do this, let's come up to the Create button, we can also use the keyboard shortcut C in order to open this window up. And instead of creating an issue like we've done previously in this course, up at the top right-hand side, there is a button to import issues. And this is going to import a CSV file.

Now I have one of those ready that we can use. And let me open that up first, so we can see what this CSV file looks like. So we can see the field up here at the top. So Summary, Description, we can see the value down below, and you'll notice not every issue is going to have to have every field filled out. So, only one of them in this case has a description, the rest are empty.

So with this, let's go ahead and close out of this, and then come back over to JIRA, select that CSV file, hit next. Now we need to tell JIRA, where do we want those issues to live? Remember, issues always live in a project. So in this case, let's move these into our Marketing Project. There we go. It's a CSV, so comma is going to be the delimiter, I'm just going to leave all of that at default. Hit next, and now we can map the fields.

So if you remember, in the CSV file, we had at the top, we had our Description, Issue type, and Summary. Those were the top fields inside of the CSV. Now we tell JIRA where we want to map those two. So we're going to map the Description to Description, the Issue type, to Issue type and the Summary to Summary.

Now, of course, inside the CSV, you can really call it whatever you want, you know, instead of saying Issue type in the CSV, I could have said something completely different, you know, potato. And then in here, mapping that to the field, I just find it's a lot easier if you know what the field is called in JIRA, then it's easier in the CSV to call it that. That way when you get into mapping things, it's all pretty straightforward.

Now for some of these, we have the ability to map the field value. We don't necessarily need to do this on all of them. But I am going to do that for the Issue type because then we can come in and get to a little bit more detail and say, okay, in the CSV, when the value is Bug, I want to make sure it's a Bug.

When the value is Story, I want to make sure that in JIRA, it's going to create Stories, it's not going to create it as you know, a Task or an Epic or something like that, right. So when you have a drop down or something like that, I would recommend mapping the actual value since you can do that. The other fields, Summary, Description, those are text fields, and so there's not really a specific value that it's going towards.

But that would be something that would recommend for dropdowns or Issue types, things like that. Then, we just come in, begin the import, and JIRA will go through the process of importing those issues.

Of course, how many you actually have in the CSV will determine how long it will take. We can see in this case didn't take very long at all; we have five of them that have been imported. And

what's really cool is now JIRA basically creates a filter for the issues that we've created. And so we can see, here are the issues that we've created. And if we want to double check this, let's hop back to our CSV file, minimize that so we can see, here are the issues that we had. So set up the editorial calendar, that's a Story got correctly, change the password, another Story, these Bugs got imported correctly, and the Story as well.

So obviously, the issues that you'll be importing will be different than the ones that I did. But as you can see, importing issues into JIRA can be a great way to very quickly create a lot of issues at once. My recommendation is to start with just a couple of them at a time, instead of trying to import you know, a thousand issues all at once, and then find out that wait a minute, I didn't map the fields correctly or something like that. And then, you have to go in there and clean up all those issues inside of JIRA.

So, import just a few of them to make sure that you have all the fields that you want, all the information that you want, everything is mapped correctly, and then go through the process of creating a lot more if you need to. But if you do go through that process, and you do need to make some edits to the issues that you just created, you can do that. And we'll look at how you can do that in our next video.

Video: Editing Issues in Bulk

Dan: In our last video, we looked at creating issues in bulk. In this video, we'll look at editing issues in bulk. So the first step to editing issues in bulk is to search for the issues that we want to edit.

So this is something very similar to what we've done before. Basically, we're going through the same process of if we were to create a filter, right? So coming into Advanced Search, let's find issues, let's say, you know, I really meant to when I imported all those issues in the last video, I meant to add a Label so I can find any issues that I've imported later on something like that. So let's say come in, I want to find something that was created within the last hour, it's pretty recent, when I did that, there we go. So these are all the issues that have been created in the last hour.

Now we can come in and come up to Bulk change the issues. So, this is going to walk through the process or little wizard here to make edits to these issues. So the first step is to choose the issues that we want. So filtering this down even further, you'll notice that there were some that we had created earlier, when we're looking at Roadmaps, and those are included in here. And I really only want the ones that we imported. So I'm going to select these, hit Next. So those are the issues that we're going to be editing, see five issues, and they're in one project.

So what do we want to do with these issues? Do we want to delete them? So if we import it, and we made a mistake, we imported way too many issues all at once, and we want to get rid of them to re-import them again, fixed or something like that, we could delete them, just know that it is permanent. You know, JIRA is letting you know, that is permanent. Once they're deleted, you cannot bring them back.

In this case, I'm going to edit them. And now we can tell JIRA, what field do you want to edit? So this is a page that I wanted you to see, because you'll notice we have all of these different fields in here. Even if the field is not shown on the issue itself, that doesn't mean that the field does not exist, it's just not being displayed on that issue. So that's something to keep in mind when you're working with issues.

So remember, the fields live on the issues. And if you don't see a field on there, it may still have data if it was once displayed, say a Due date. Say if we had a Due date, and we were using that for months and months and months, and then we're not going to use that anymore and so the JIRA administrator hides that, that does not delete any of that data that was in there. It just hides it from visibility on the issue.

So we could come in, we could change the Issue type if we wanted to. In this case, I'm going to change the Label. And let's say replace all the Labels with Imported. So this is an Imported issue. There we go. So that's the change that we want to make. One thing I do want to point out here, this is a mistake that I've made, you learn from my mistakes. Do not check this send mail for update unless you really want to notify everybody on that issue.

If you are making bulk changes, I've made changes to you know, archiving or deleting hundreds and thousands of issues before and if you accidentally have this selected, anybody who reported

the issue, was assigned the issue, you know, is getting notifications for that, will get an update. And then you get a lot of emails saying; “Hey, what happened to this issue that was you know, years and years old”? It's like, I was just cleaning up, it's no big deal.

But once we're happy with what we're going to be changing, let's go ahead and go to next. This is confirmation, okay, the email notifications are not going to be sent. And this is essentially what's going to happen, we're going to have these five issues. Currently, there's no Labels on there. But we're going to add the Label imported, hit Confirm, and then JIRA is going to go through the process. And again, depending on how many issues you're changing, that's going to determine how long it takes to actually do this.

Once it's done, we can acknowledge that. And now we can see these issues here have that Label that we've applied to it. Now what's really cool about this is now we could come in and we could say okay, well now instead of when they were created, I want to filter by the Label, and I want to find everything that has imported. So these are all the imported issues. So at any time, we could save this off as a filter, we could use it in Reports, we could use it on our Dashboard. So we could see those issues that we've imported.

And again, we could use this for any sort of thing you know, it doesn't necessarily just have to be the issues that we've imported. Hopefully you're starting to get a sense for how we can very quickly create issues and we can edit a lot of issues at once in order to aid in finding them later in Filters or wherever we may need them. Alright, and with that, we've come to an end of this section.

Now I've mentioned being a JIRA administrator throughout this section and in our next section, we're going to focus on the JIRA administrative backend. So when you're ready, I'll see you there.

Section 5 – User management in JIRA

Video: User management in JIRA

Dan: In this video, we'll get an understanding for how Users work in JIRA. So inside JIRA, your billing is going to be based on Users, but not necessarily the overall number of Users.

What you'll be paying for, especially if you're using a JIRA Cloud subscription license, like I am in this course, what you'll be paying for is Product access. And probably the first question that I get whenever I explain this to someone who's new to JIRA is what's the point of a user in JIRA, if they don't have access to JIRA?

Well, there are a number of reasons why you may want that. But probably the most common reason that I've come across in my experience is if there's someone who is just not a member of the team anymore. You don't have to delete their entire user account, you just revoke access. That way, all their past comments, issues and things that they've created, are still inside of JIRA and still attributed to that user, they just don't have access to anything anymore. They can't log in, you're not paying for access for someone who is no longer on the team. So let's see where we can manage this.

Of course, just like everything in this section, managing Users requires JIRA administrative permissions. So let's hop into the User management section up here, go to the top right, open this up, and you'll notice that there is a little warning that pops up here. This is something I've noticed in my browser, I use Brave as my browser, and I've noticed this pop up recently. I haven't seen any sort of bugs or have any problems in this section at all, just something that I've noticed pop up. So I'm just going to close out of that.

Now here, of course, we have a list of all of our Users. But over on the left side, we have our Site access and Product access. So Site access is where we can control how Users get access to JIRA. So in here, we can really narrow down. You can see I'm limiting who can get access to JIRA based on the domain for their email. Or we could say, you know, any email or any domain will work or don't approve any of them at all, right?

So in this case, it would be New Users actually have to be approved by the admin. And so you can come into the Access requests, and you can start to see who has requested access to the site. And you can get a fine level of control over who you want inside of JIRA. Because again, if you're approving Users, probably the New Users are going to have Product access. And that's going to be something that will increase your bill.

Speaking of Product access over here on the left side, we have that and you can see, by default, New Users are going to have access to the products. So when you accept New Users in by default, they're going to increase your user account that has Product access, and, by extension, increase your bill. So that is definitely something that you'll want to keep tabs on if you want to keep tabs on the increase of your bill.

Okay, so let's actually add in a New User here, so I'm going to hop back to Users. We can invite a user and just click on this here. Add in the email address, so I'm going to invite somebody here, there we go. We can control the role that they have. We can see what these roles do. By default, the basic access is going to be only what we specify. So in this case, we only want them to have access to JIRA, then we can specifically add them to have Product access to JIRA. Or, do we want them to be trusted, which means that they can invite other Users.

So they could start to add other Users, which can be helpful. But again, depending on how we want to monitor that bill with the Product access. We may not want to have a lot of trusted Users out there that can also start to you know, add their add Users on their own. And then of course, there's the Site administrator, which is going to be able to have all of the billing details.

This is pretty straightforward being an overall JIRA administrator. I'm going to keep this at basic, and I'm going to give Brad when I invite him, I'm going to give him access to JIRA. And we could add Brad into a group if you want to. We'll look at groups here in a second.

Let's go ahead and invite Brad so we can see what it looks like. Okay, so we've invited one user. I'm going to pull over email here so we can see what this looks like on the other end. So we can see okay, this is the email that Brad is going to get and then we just walk through the process of joining. So click on the link. And if we don't already have an Atlassian account, then it'll walk through the process of doing that.

If we do, then we could, you know, log in here. In this case, let's go ahead and just walk through this real quick. Give him a password, walkthrough CAPTCHA that we're familiar with there, and there we go.

So that is pretty straightforward process for signing up. But we kind of get an idea for how it looks on the other end and Brad is in there. And then back in the administrative side on JIRA, we can see that he's in our list, he has Product access, and we could add him into a group here. So groups are going to be how you want to organize things for your Users. So let's create a new group, hop over to the left side, create a group, and let's maybe call this Managers and of course, you know, the group name, how you organize your group is really going to be up to you.

But once we have a group created, then we can come in add members and say, okay, Brad is part of this, add him into that group. And now anything that is shared with that group, Brad will automatically get access to. So if we share filters, if we change permission levels on the group, which we'll be looking at later in this section, then all of a sudden, Brad is going to get access to any of those things that shared with a group. So, it's just a faster way of being able to organize the Users together.

Alright, so to recap, in this video, we learned how Users and Product access in JIRA are two different things. We learned how to control the Site access settings. We also looked at the process on both sides of how to invite Users into JIRA. In our next video, we'll look at the administration area for Company-Managed Projects.

JIRA

Video: Company-Managed Project Administration Overview

Dan: In this video, we'll get an overview of the Company-Managed Project administration area. So let's head into our project, and then over on the left side menu at the bottom, we'll find our Project settings.

Now if you do not see this, that just means you do not have administrative permissions over the project. I do want to point out that administrative permissions for a project are different from overall JIRA administrative permissions, right. So if you're an overall JIRA administrator, you're going to have admin permissions over all the projects. But you can also have Users in your organization that only have administrative permissions over individual projects.

So let's hop in here and get an overview of all the settings you see here. You can see there are a lot of different customization that we can do to a project. And really, this area could be a course in and of itself. But on the details, we have some of the things that we set up when we created the project. So things like the name of the project, we want to change that the key.

Now one cool thing about the key is the key does have to be unique, because the key is tied to the Issues themselves. You remember when you're creating the Issues, they're sequential, you know, so be Marketing-1, Marketing-2, and so on. If we change the key, then JIRA is going to have to re-index everything because it's going to have to change those URLs. But what's cool about it is JIRA remembers what the URLs used to be.

So if there's a link out there to Marketing-1 to that issue and we update it to something, the key to something else, the URL is going to change, but that old link will still work, it'll still automatically forward. The other key thing I want to point out in this section here is the Project lead.

So the Project lead, the primary purpose is really just this right here who the default assignee is. So if you don't want the default assignee to be unassigned, then you can assign it to the Project lead. And now, any issues that are created in this project, if whoever is reporting that issue does not assign it to somebody at the point of creation, it will automatically be assigned to me, to Dan, because I am the Project lead there.

So I've worked with teams who have like a point of contact. All of the issues in the particular project get assigned to this person so that they can make sure nothing slips between the cracks and delegate that on to somebody else on the team. Next, we have the People. Now I am working with a free plan here in JIRA so I don't have access to control the user roles on a project level. That's one of the limitations of the free plan.

But in here is where you can come in and make a project administrator. If you wanted to search for certain people, or groups, like we learned about earlier, creating a group to automatically give administrative permissions on a project level to maybe all the managers in the organization, we can do that in here as well. Then we have Automation. So we will look at Automation later on in this section.

But just know that in here, think of it kind of like If this then that, or Zapier, if you're familiar with those tools. Basically, we can come in and say okay, when all the stories that are tied to an Epic are closed, when the Stories are closed, then automatically close the Epic, we can do that sort of thing. So again, we'll look at Automation later on in this section. We have the Feature so we can turn on or off some of these features. So turning on or off the Roadmap or things like that in the project.

Some of these are tied, you notice when I hover over that, it's talking about the Board settings, some of those are tied to the actual Board itself. We looked at that earlier in this course. And then some of these are tied to the overall project. So being able to see the code link on the left side menu, if we wanted to do that. Or maybe we don't want to be able to see that because we're not really working with code. If this is the Marketing Team, probably not really working with code and so we can turn that off, and it's not going to show up on the project.

Now the Summary is kind of an overall view of the current settings, right. So most of these things are the same thing that we have over here in this left menu. So things like the Screens, the Workflows, you can see. But this is just a good summary of all of those options that we have. And a lot of these in this particular case, were set up by the Project template that we chose, but in here we can start to customize them. And don't worry, we'll look at changing some of those more common settings later on in this section as well.

Moving on, we have the Issue types. So these are the Issue types that live inside of this project. And here's where we can start to customize that if we wanted to add a different type of Issue or remove one from. If we don't want to have Bugs in the marketing Project anymore, we can remove that in here. Then we have the Issue layout. So this is where we can control the fields that are on each Issue type. So you can see here, the Story, Epic, Tasks, and Subtasks are all using the same types of fields.

But, the Bug Issue type has different fields defined. And, what JIRA uses to define those are called Screens, right? So we could come in here and customize that if we wanted to. Now, I want to point out, you'll notice when I click on this, all of a sudden, I'm taken to a different area. This is the overall JIRA administrative backend. So if you are project administrator, and you try to click on that, it won't let you, that just means you don't have overall JIRA permissions.

Because, this screen can actually be shared across multiple projects, multiple Company-Managed Projects, and it's one of the benefits to Company-Managed Projects is being able to share things across there. Of course, in order to change a lot of that, you have to have overall JIRA administrative permissions.

Next, we have our Workflow. So we looked at Workflows earlier, basically, these are going to be the Statuses and those transitions between the different Statuses and how they are controlled in this project. And then Screen, we just looked at Screens here, so we can see the Screens that are currently being used in this project.

Then we have our Fields. So these are the Fields that are being used in this project, right. So what Fields do we want, and which Screens do they show up on? This is something that very

quickly again, will start to jump you into the overall JIRA administrative side, because these configurations can be shared across multiple projects. But in here on the project side, we can see what our configuration is for this project. And if you are not an overall JIRA administrator, then you talk to your JIRA administrator to customize this if you want to do that.

Next, we have the Components. So we talked about Components earlier, we don't really have any in here right now. But if you think of a Component, kind of like, maybe your website is the project, but your payment processing might be a Component of the project. So then you can have all of the different issues that are associated with that Component, the payment processing part perhaps, then can be grouped together for you to see all of that. It's just a nice way of organizing the Issues in your project.

Next, we have integration with Opsgenie which is another Atlassian product and that's kind of outside the scope of this particular course. But we can control some of that and how Opsgenie works with our project here. Then we have the Permissions, this is pretty straightforward. You can go a little more in depth with Permissions here rather than on the People menu in there. But in here, we can set up the Permissions for this project. So which Users can actually browse the project, who can actually see it, who can manage the Sprints on the boards for this project. And we can start to customize a lot of that and choose how we want the features inside of our project to be controlled and who can control them. So this is not only going to be Users, but you could also do groups or things like that as well.

Next, we have the Issue Security. So Issue Security is not enabled by default. But if you wanted to hide certain issues from some Users in the project, you can do that in here. For example, I've done this before for teams when we had like customer feedback. It was something our customer service team could create and work with issues but they weren't visible to anyone else until they decided what they were going to do with them, right. So this is something you can control who can and who cannot view issues, essentially.

Then we have a Notification. So what sort of notifications happen for the issues in this project. So you can see right now and by default, anytime an issue is created in this project, all the watchers, who it's currently assigned to, who reported it, they're going to get notifications. Again, you can see here, this is the default notification scheme that is shared by three projects. So as with a lot of the configurations for the project, if we were to jump into start to edit this because it's shared by multiple projects, we have to have overall JIRA permissions.

Now we have the Development tool. So in here we can start to link other tools so we can link you know, Bitbucket or GitHub or whatever we may want into JIRA. We have Issue collectors. So Issue collectors are really, really cool. They're basically a form that you can put on your website in order to collect Issues, right? I mean that's where the name comes from.

So say you put the form on your website, and then it'll pop up. And when somebody creates or fills out the form, basically what JIRA does on the backend is it automatically creates an Issue. And in here, you can configure what sort of fields there are, where it goes in the project, what type of Issue, what Issue type it is, and so on. Because usually, on the front end of a website, you know, if you're having customers fill out this form, they don't need to select the Issue type, they

don't need to select the priority level, who it goes, who gets assigned to, and things like that. So you can start to customize a lot of that in here.

And then of course, we have Slack integration. Being able to integrate the Issues and Notifications that happened inside this project to your team's channel inside of Slack.

Okay, so to recap, in this video, we've really just scratched the surface of the types of customizations that you can do with your projects here in JIRA to get things set up for how your team needs. All of this is just for the one project that we're inside of right now. And hopefully now the gears are starting to turn with ideas for how you can customize your own Company-Managed Projects. Now in our next video, we're going to get a look at Workflows in JIRA

Video: Understanding Workflows

Dan: In this video we'll learn about Workflows in JIRA. So Workflow lets you control the process for issues in a project. And what I mean by that is we've seen the board, and we've seen how we can take Statuses for issues and map them to the different columns on the board. So let's think of these as Statuses, right.

So when you have an issue, that is, say in the To Do Status, when you take it and you change that Status to something else, the process of changing that Status from To Do to In Progress is called a transition inside of JIRA. So you have the different Statuses and when an issue changes from one Status to another, that is a transition. Collectively, the Statuses and the transitions are called Workflows inside of JIRA. So let's take a look at what this looks like actually in JIRA. So I'm gonna pull open JIRA here.

To get to our Workflows, let's come up to Settings and Issues. And then over on the left side, we can find our Workflows. So these are currently the active Workflows that we have inside of JIRA for our Company-Managed Projects. So if we were to look at one of these, we can see, okay, these are the Statuses that we have. So when a new issue is created, it's going to be in the To Do Status, right, and then any of these Statuses can transition to all of the other Statuses.

So we could take an issue from To Do, and drag it into Done, because we have all Statuses can transition to Done right. So that's the way we have this Workflow set up. And by default, the default behavior that JIRA is going to try to get you to do is to transition all Statuses into all other Statuses. Because that's expected behavior. You would expect to be able to take an issue and transition it to any others that you want. You can customize that if you want to. But unless there's a specific reason to do that, I would recommend sticking with allowing all Statuses to transition into all the others.

Now, if we wanted to edit this, and maybe add in a new Status, what JIRA is going to do is it's going to put this into a draft state. The reason why JIRA does this is because this is an active Workflow. So if there are Users out there transitioning issues from one Status to another, if we were to come in here and get rid of one of those Statuses or add a new Status into this, then that can start to mess up with people who are actively using that Workflow.

So basically, takes it into a draft state, and then you have to publish that draft and overwrite anything currently out there. So let's say we wanted to add in a new Status. And I'm going to allow all Statuses to transition into this one. So when we add this, now we can come in, and you know what, let's get a little more advanced with this. Let's come in to our Status here and do a post function, or I'm sorry, our transition.

And on this, what we can do is we can say, okay, after this transition happens, we're going to add a post function to this. And we're going to say, we're going to update a field and come in and assign this to Mary. Okay, so what's going to happen now is, anytime an issue in this project is set to the Graphics Status, it will get assigned to Mary because she's our graphic designer. So

basically, dragging it into that Status means automatically assign it to Mary. Okay, so let's see this in action.

First, we need to publish this draft. Now I don't need to save a backup copy. Let's go ahead and publish this. Okay, so now that this is active, we've published that Workflow. If we head over to our project, let's come into our board here. We can see we have this new Status that we've created. Let's pull it into the In Progress. Actually, you know what, let's do this, let's add in a new column here. So Graphics, we'll add a new column and we can take the Status and map it to that.

So now, if we take an issue and pull it into Graphics, watch what happens. You can see the assignee here watch what happens. We can see this is going to automatically get assigned to Mary. Okay, so to recap, in this video, we learned about the concept of Workflows, Statuses and Transitions and we even looked at a way that we can customize our Workflow to automatically assign issues when they transition from one Status to another.

Now one of the big benefits of Company-Managed Projects is the ability to share some of these configurations across different projects. So in our next video, we'll look at how we can apply the same Workflow to a different project using what JIRA calls Schemes.

Video: Understanding How Schemes Work (1)

Dan: In this video, we'll look at how Schemes work in JIRA. One of the big benefits to Company-Managed Projects is the ability to share configurations across those projects. To do that, JIRA uses what it calls Schemes. So let's look at how we can take that Workflow that we updated in the last video, and see how we can apply it to a completely different project. So let's hop into JIRA.

So the Workflow that we're working with is from the sample Scrum project, and let's say we want to apply it to the Marketing Team project. So let's hop into the Marketing Team. In the project settings, we go under Workflows, we can see, okay, this is the Workflow that is currently being used, right? So these are the Issue types in that Workflow. And if we were to come in here and edit it, then we can see, you know, kind of what we had seen before, I kind of prefer the diagram view. So we can see this is the Workflow that's being used.

This is what we were doing in the last video. So let's go back to where we were in the project, and we can see this Workflow is attached to this Scheme. And this Scheme is what is attached to the project. Okay, so let's switch our Scheme. And this is where it's helpful to have your Schemes and have things named well. So these were Schemes and Workflows and such that were automatically created when we created the project and so JIRA has kind of its default naming Scheme there.

So when we associate this, JIRA is going to go through all of the issues that we have in the project, and say, can these Issue types and Statuses be migrated? Right, if there are any sort of issues, it'll pop up and let you know that there are some issues there. If there are none, then go through the process of migrating those. Basically, it's migrating the issues in that project to the new Workflow. We go, acknowledge that. So now we've shifted the Scheme that the project is using, we can see it shared by two projects now.

So if we head back to our project, and go to the board settings, now you'll notice on this board, we have the same Status that we had created before, right? So we created this in our last video in the sample Scrum project Workflow. And because that Scheme is now applied to this project as well, now it's going to show up here. So we could do kind of the same thing we had done before. Let's do this. So we can see that we're sharing this here.

Let's pull the Status over. And now if we go back to the board, remember we had set up a post function on that transition. So if I take an issue now and drag it over here, that will automatically get assigned to Mary.

So this concept of Schemes can really help us organize our Company-Managed Projects a lot easier, because we can create the Workflow that we want, and then share it across multiple projects. For example, I've worked with some companies who have maybe one Workflow for internal projects and a different Workflow for external projects.

Then using Schemes, we can apply that same Workflow to any new project that gets created, whether it's, you know, internal only, or if we're working externally with freelancers or that sort

of project. But Schemes are not only for Workflows. If we head into our JIRA administration on the issue side here, we can see the Workflow Schemes that we have. You can see right here, it's saying, okay, for Unassigned Issue types, if we wanted to, we could come in here, we could edit this and we can say, you know what, for this Workflow here, we want it to only be for our Bugs, right? So the Bugs can have a completely different Workflow than the Stories in our project.

Maybe we let the Bugs Issue type transition into a QA Status while Stories can't. We can get a fine level of control over how all that happens with our Schemes. Now, with that said, sort of like how we learned in the last video, adding too much control over the transitions in a Workflow can lead to user confusion. Well, in my experience, the same thing is true with Schemes.

So unless you have a good reason for controlling different Workflows with different Issue types in the same project, I would recommend keeping all Issue types with this kind of default of all Unassigned Issue types in the same Workflow. But Schemes are not only for Workflows. You can see over here we have Issue type Scheme so we can drive what Issue types are assigned to different projects. We have the Workflow Schemes that we've looked at, we have the Issue type Screen Schemes.

So the screens control the fields that are displayed on issues. So an Issue type Screen Scheme would control how those are displayed across the different projects in JIRA. We have Field Configuration Scheme. So the fields themselves, do we want some of the fields to be required fields in one project, and then maybe in another project, it's not a required field? We can use the same field require it in one and not in another using the Schemes.

We have Issue Security Schemes. So do we want to show or hide certain issues from Users or groups in some projects over others? We have Notification Schemes. So you can see right now, all of the notifications are the same across all of our projects. But we could customize this to change how notifications happen in some projects over another. Or the same with Permissions, right? So we can share permissions across multiple projects if we want to make it easier to manage them.

Okay, so to recap, Schemes are how JIRA connects configurations, permissions, Issue types, notifications, and so on. It connects our configurations to one or more Company-Managed Projects. I would encourage you to take some time after this video to review how your JIRA installation Schemes are set up, and start to see where you can customize it for your organization. For example, if all these permissions are the same, across all of our projects, we don't really need three different Schemes for them.

Because if we wanted to make a change to our permissions and have it applied to all those projects, we have to go into all three of these different permission Schemes and change that. Instead, maybe if we want them to all be the same, we could just have one Scheme that is applied to all of our projects. Sometimes there can be some cleanup or getting rid of some of the excessive Schemes that get generated by JIRA automatically.

When you're ready, I'll see you in the next video where we'll look at creating a new Issue type.

Video: Creating a New Issue type

Dan: In this video, we'll look at how to create our own custom Issue type here in JIRA. Alright, so to do this, let's hop into the JIRA administration. So come up to Settings, into Issues, over on the left side, we will find the Issue types. So these are all the Issue types that we have inside of JIRA right now. To create a new one, it's pretty simple, all we need to do is to come into Add Issue type, and let's give this a name.

So let's say maybe this is going to be New Feature, and we give it a type. So this is the type of Issue type. I know that can be kind of confusing there. But basically, there's two types of Issue types inside of JIRA, there are Standard and Subtasks. So let's go ahead and add this as a Standard. And we can see, all of these are Standard Issue types, which means they're essentially the root if you think of it as a hierarchy.

Like if we can't create a Subtask Issue type without it being attached to a Standard Issue type. So that's really all that is. Actually, you know what, let's come in, I'm going to edit this. Because I want to add an image to this just to customize a little bit further, we could upload our own if we have some graphics we wanted to upload. I'm just gonna use this little plus here, just to add a nice little bit of customization to that.

So we have our Issue type created. But if I were to come up here and create a new issue, we can't see it, it's nowhere to be found. It's not in any of these projects. Well, the reason for that is because of what we learnt in our last video, we have to use a Scheme to attach it to the project, right?

So we have our new Issue type created, and then we use a Scheme to attach it. You can see the related Schemes here that are associated with that. Let's head over to our Issue type schemes. And we can see what projects are using what Issue type scheme. So we can see. Let's say we want to attach it to our Marketing Team project, we would have to edit this scheme.

So let's edit and we can find our new Issue type here. Let's go ahead and add this in, Save. And now if we create a new issue in the Marketing Team project, we will find the New Feature listed there and you'll notice it's actually in the order that I had it in in the scheme that we customize in this scheme.

So we can create a New Feature inside of the Marketing Team project. But if we were switch projects to a different one, that Issue type is not there because it is not associated with the Issue type scheme.

So to recap, in this video, we created a new custom Issue type and then we assigned that Issue type to a project by using the Issue type scheme. Now another common task that you're probably going to be doing is customizing this even further by adding in some Custom Fields.

So with our custom Issue type created, let's move on to our next video where we'll look at how we can create a Custom Field here in JIRA.

Video: Creating Custom Fields

Dan: In this video we'll learn how to create a new Custom Field. Alright so to do this, let's hop into our JIRA Settings. So come up to Settings, Issues, and on the left-hand side, we will find our Custom Field.

Now you'll notice there are already a lot of Custom Fields in here. These are the fields that come with JIRA by default. And some of these are going to be locked like the Epics, right? Because Epics are built into JIRA, and they're displayed in special locations like in the backlog for, you know, a Scrum Agile Board, then, you can't actually edit these inside of JIRA.

But what we can do is we can come in, create our own Custom Field. And let's say we want this to be a drop down, so a single list or select list with us with single choice. And let's give this a name. So this is going to go on the Feature requests or the New Feature Issue type that we created in the last video. So let's call this our Feature Location and get some location. So like website, mobile app, social, other, you get the idea. We can start to add in whatever locations that we want. We can rearrange these however we want to, go ahead, and create that field.

Now JIRA is going to say, okay, well, now that you have a field created, where do you want this to show up, right? I'm actually not going to select anything here, because we want this to only show up on the New Feature Issue type that we created. And we have not created a screen for that yet. Okay, we don't want it to show up on any of the existing screens yet. So let's come in and create a new screen.

Actually, rather than adding a screen from scratch, I'm going to take this screen, which is the default for the Marketing Team project, and I'm going to copy this so we have something to start with. So this is going to be our New Feature Screen, there we go. And so now we can come in and edit this. So we already have this, let's come in and add the field that we just created. So Feature Location, maybe move it up. And you know, I can remove labels, we can remove or add whatever we want on this screen.

Now we need to create a Screen Scheme. So this over here on the left-hand side, go to Screen Schemes, and I'm going to add in a new Screen Scheme. So let's call this our New Feature Screen Scheme. And the default screen for this is going to be the one that we just created, okay? So once we add this in, now what we want to do is we want to apply this Screen Scheme to the New Feature Issue type that we created in our last video.

So to do that, we're going to go into the Issue type Screen Scheme, and we can see, these are what is applied to the project. And if we actually hop into this Issue type Screen Scheme, we can see okay, for a Bug, it's going to show this Screen Scheme. For all of the other Issue types in this project, it's going to show the default one. And what we want to do is we want to associate the New Feature Issue type with the New Feature Screen Scheme that we created.

So once this is added in, now if we come in and we create a new Issue, watch what happens. We have our Story, we can see, there's our Feature Location Field is not there. As soon as we switch to our New Feature, now we have this Feature Location Field that we added in. So with Fields

and Screens and their Schemes, we have quite a bit of power over what fields get displayed and where they're displayed.

My recommendation is to sit down with your team leaders and figure out what it is their teams need to track to be productive, then create the fields that are needed to store that data and remove any of the fields that they don't need to see from their screen. Like earlier, if you're not using Labels in your organization, then there's no need to show that field. It's only going to add to the visual clutter that keep people from wanting to be more productive in JIRA.

Alrighty, so we're going to switch gears a little bit and in our next video, we'll look at the basics of Automation in JIRA.

Video: Basics of Automation in JIRA

Dan: In this video, we'll get familiar with Automation in JIRA. Now there are a few places where we can go to create an Automation robot, probably the easiest is directly from our Agile board. So we can hop into our project here, up at the top right-hand side, we'll find the Automation.

Automation is made up of a trigger, a condition, and an action, okay? So let's say we want any issues that are assigned to Mary to automatically have the priority level bumped up, okay? So we can do that I'm going to hop into all triggers, just so we can start to see really the breadth of what we can do with Automations. There's so much stuff that we could do.

Automations really could be an entire course in and of itself. But the basics are pretty straightforward. So let's say for the trigger when the issue is assigned, okay, and then we're going to add a condition because we only want it to have this trigger when it is assigned to Mary not when it's assigned to anybody, but only to Mary. So that condition will check a field and we want it to check the Assignee field equals Mary, okay?

So now, this Automation will trigger when an issue is assigned, and the assignee equals Mary. Now, what do we want it to do? That's the action. And in this case, let's say we want it to edit the issue, and we want it to edit the priority field. And let's set this to highest. Okay? So save it, let's turn it on. So assign to Mary, priority to highest, whatever name you want, turn this on. And now if we head back to the project, watch what happens. I'm going to filter just so we can see this a little bit easier.

So this is an Automation in the Marketing Team a project, okay? So this has to be with the issues that are inside the Marketing Team project. So, one of these issues here, watch what happens if I take this issue and I assign it to Mary, watch the priority level. It's going to automatically jump to the highest priority once that Automation kicks in, right? And what's cool about this, if you recall in an earlier video, we created a post function on the Workflow for this project.

So when an issue is transitioned into this Graphics Status, it will automatically get assigned to Mary. And then on top of that, we add another layer with the Automation to set the priority level to change a field on that issue. So if I were to take this, look at the priority level on this issue. If I drag it into Graphics, watch what happens. It's going to switch to automatically be assigned to Mary, that's the post function, and then the priority level is going to automatically update. That's the Automation happening there.

So there are a ton of stuff that we can do with these. And we can do these not only on a project level, if we head back to our Project Settings and go into Automation. We can see these are the Automations that are inside this project. But we also have Global rules that can go across all projects, right. So if we wanted to create a similar rule for all projects, regardless of where it is, then we can add Global rules with our Automation.

There are a ton of stuff that we can do when we start to create these with the triggers, the conditions, and the actions. There are just a ton of customization that we can do. I really

JIRA

encourage you take some time, play around with some of these, and start thinking about how you can use Automation to speed things up in your organization. When you're ready, I'll see you in the next video where we'll get an overview of JIRA's system administration area. See you there.

Video: JIRA System Administration Overview

Dan: Throughout this course, we've covered a lot of the more common things we'll need to do in JIRA. In this video, we'll pick up a few more tips and tricks as we get an overview of JIRA's global administration area. So let's hop into the overall system setting. So come up to Settings System, and this is JIRA's global administration area. So we're not talking about anything applying to a single project. This is across the entire JIRA installation.

So earlier in this section, I was talking about Permissions. We could come into the Global permissions, and we could say, you know what, instead of letting anybody create Team-Managed projects, which is the default, we could say, instead, I only want people who are in that Managers group that we created earlier in this section, right? So only managers, I can delete the Users.

Now, across this JIRA installation, only Users who are part of this Managers group will be able to create Team-Managed projects. So if you are trying to create a Team-Managed project, you're following along with that part of this course and you're not able to, it's very likely that your JIRA administrator has locked that down because there are some permissions that you can control here globally.

Speaking of permissions, another thing that I really like in this area is the Permission and Notification helper. So if you're a JIRA administrator and one of your Users, let's say, you know, Mary comes and she says, I can't actually access one of these issues, right? So I can't see Marketing 6, right, what's going on there?

This helper will walk through and be like, you know what, she should be able to see this, everything should be fine. And so at this point, we know that there's not anything wrong with the way that JIRA is configured. And with the permissions, maybe there's something else going on. And I have had this happen where a user has an extension in their browser or something that's actually blocking something from happening.

So the helper can really well help to track down some of those errors. Because if there is something here that says, you know, there is a permission level error, then it'll give us what that is and we can go fix that to make sure that Mary can access the issues she's supposed to be able to see.

Same with notifications. If somebody is not getting a notification that they think they should be getting, we can use this Notification Helper to track down exactly where that issue may be. Something else that can help our organization, we looked at Dashboards earlier, and how to create those, we can create our own default Dashboard so that when New Users come into our JIRA installation, this would be the dashboard that they see, we can customize this to be however we want, and that's going to be global.

Of course, Users can always come in and create their own dashboards and share them with their team and do that, like we looked at earlier in this course. But this is going to be the global default

dashboard for Users. Now at any time, if you can't find something, one thing I really like is that you can actually search just through the admin area.

So if you are looking for those helpers, and we can't find them, right, we can do that. You'll notice that pressing period also pulls up this dialog box to be able to search through the JIRA admin. And that is something that I use a lot, it's super helpful to be able to just very quickly jump to things.

Now, even though this is the overall system set up for JIRA, there are some other areas where we can go. So we have the ability to control all of our projects, so we can manage all of those, right? So all of the projects that we have inside of our JIRA installation, when you are a JIRA administrator by default, you're going to be able to see everything.

We looked at this earlier in this section, but you know, anything that is pertaining to issues probably going to be doing a lot of work in here, setting up your fields and screens and Workflows and all that, we looked at that earlier in this section.

We also have the App. So this is where you can come in and start to add or manage the apps that you have installed or purchased to extend the functionality of JIRA. As I mentioned throughout this course, I don't have any extra apps or anything like that inside of JIRA. I'm only using the default, right? So I'm not using anything on top of the default JIRA installation.

Of course, we have the Billing overall. So I'm not really going to click on that because there are some private info in there. But, it's fairly straightforward. That's where you're going to go in and manage your billing for your license to JIRA. Alrighty, and as with anything throughout this entire course, I would encourage you to take some time to put some thought into how you want to customize your JIRA installation for your organization.

And with that, we've come to an end of this section and we'll wrap up the entire course in the next video.

Section 6 – Course Conclusion

Video: Course Conclusion

Dan: You made it to the end of the course, congratulations. We've learned about team managed projects, company managed projects, we've looked at customizing both types of projects. We've looked at creating custom issue types, working with workflows and statuses, and agile boards and fields and so much more.

There's just so much customization that you can do in JIRA. And, now that you know about some of the core features and the ways to customize JIRA, it's your turn to start figuring out how you can use JIRA in your own organization to get more stuff done. And remember, you don't have to get it all done at once. Agile methodology is about continuous improvement, and that works for JIRA itself too.

Try configuring it how you think it's best and work with your team to keep customizing it to help speed up everyone's workflows. I hope you enjoyed learning more about JIRA over the past few hours as much as I've enjoyed sharing it with you. Thanks for watching.