

## Getting started

- Introduction to Jira Product Discovery
- User roles and permissions

### Quick start guide

- Step 1 - Create a project
- Step 2 - Assign project roles
- Step 3 - Add ideas
- Step 4 - Create or update custom fields
- Step 5 - Add insights
- Step 6 - Prioritize ideas
- Step 7 - Create and share roadmap
- Step 8 - Connect with Jira Software

## Projects

## Ideas

## Insights

## Fields

## Views

## Delivery

## Automation

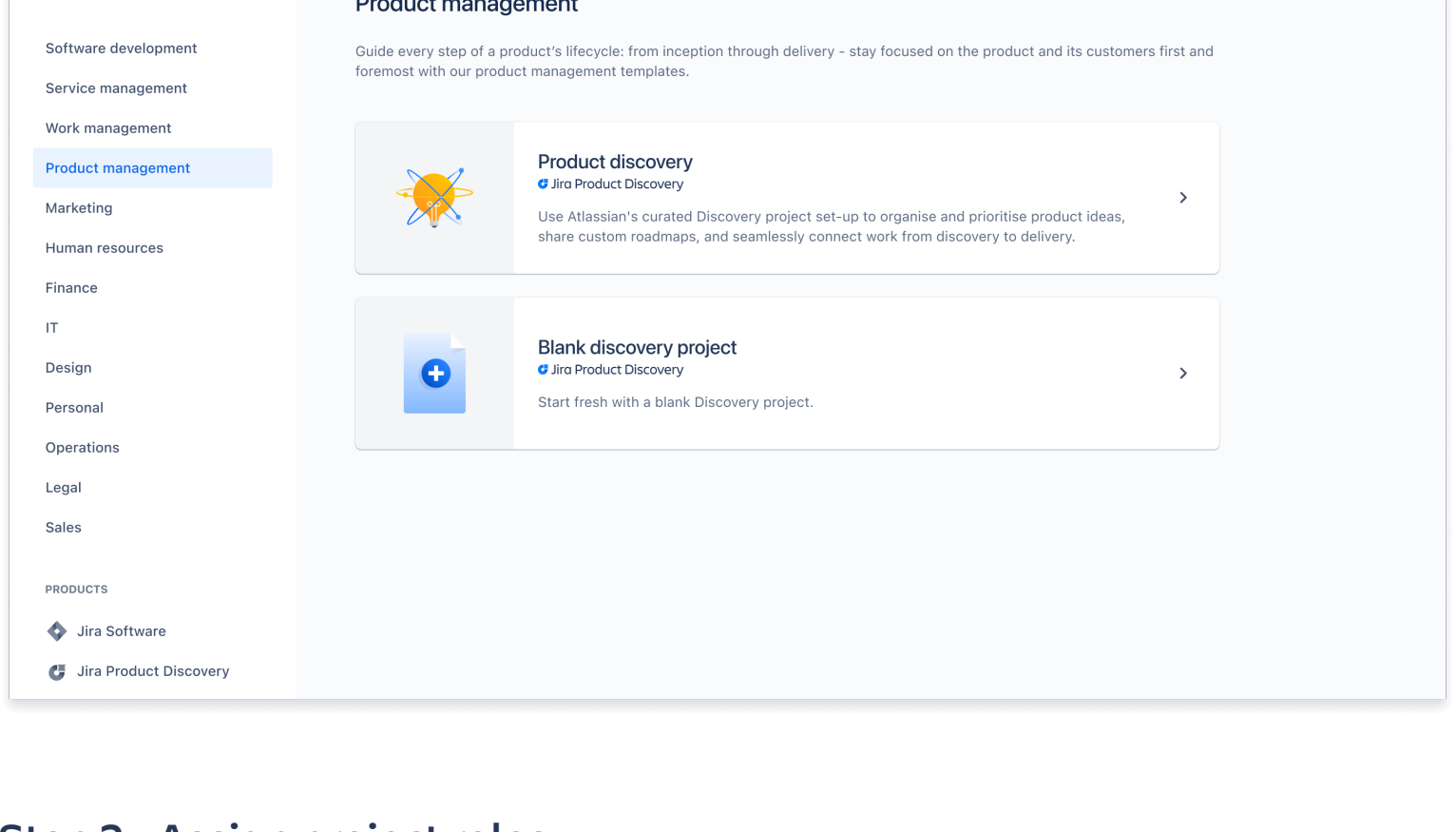
## Integrations

# Quick start guide

Follow the steps below to kickstart your first discovery project.

## Step 1 - Create a project

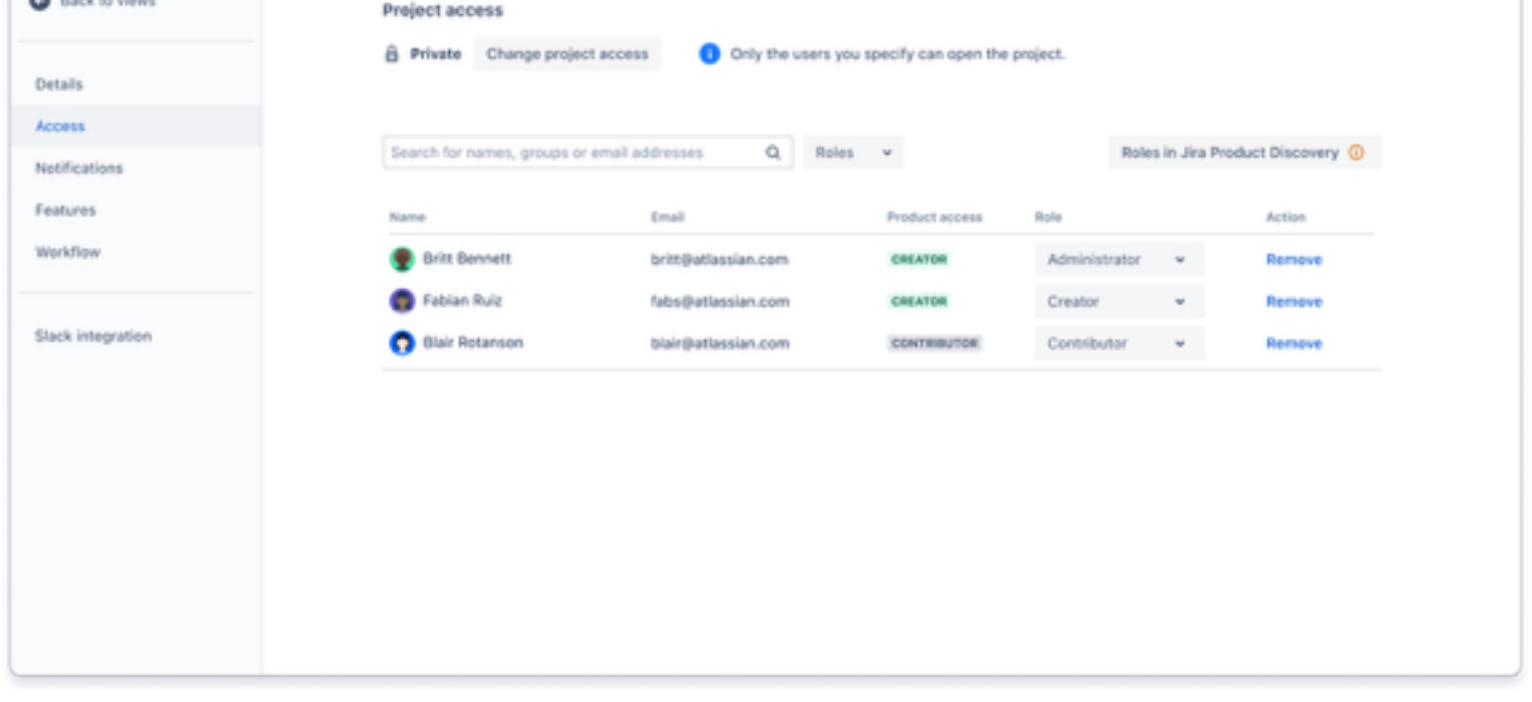
Log into your Jira Product Discovery site and click on the **Projects** dropdown in the top navigation. Click **Create project**. Here you'll find [several templates](#) you can choose from across the Jira suite of products. Select **Product management** or **Software development** and find the **Product discovery** template.



## Step 2 - Assign project roles

Decide who on your team is a Creator (create and manage ideas, views, and projects) and a Contributor (add insights, comments, and reactions, and if permitted, create ideas).

To manage project access and roles, visit **Project settings** in the lower lefthand navigation of your discovery project, and select **Access**. Note, you must be a Creator or an admin to complete this step.

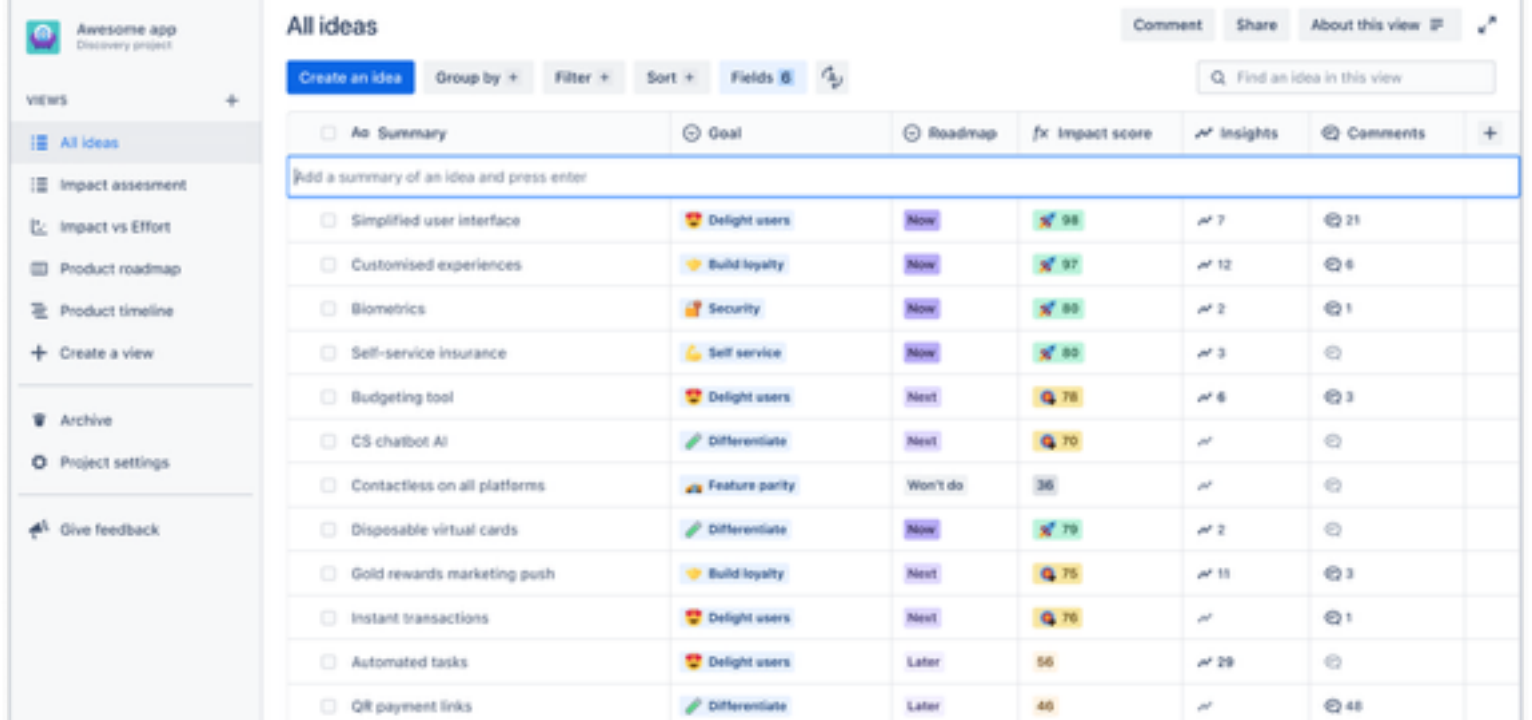


Visit our [documentation](#) to learn more about [product access](#) and [project roles](#).

## Step 3 - Add ideas

Once you've set up your project it's time to add your [ideas](#). A Jira Product Discovery project is made up of ideas, which can be anything from opportunities to potential solutions.

To add an idea, click the blue **Create** button.



Once the idea is created, click into it to add a description or context to your idea.

## Step 4 - Create or update custom fields

[Fields](#) are granular sets of criteria or traits that can help you describe, compare, and prioritize ideas. Fields can be goals, effort level, business impact, and more.

To add a new field click the **Fields +** button. Select from our out-of-the-box options, or create a custom field of your own.



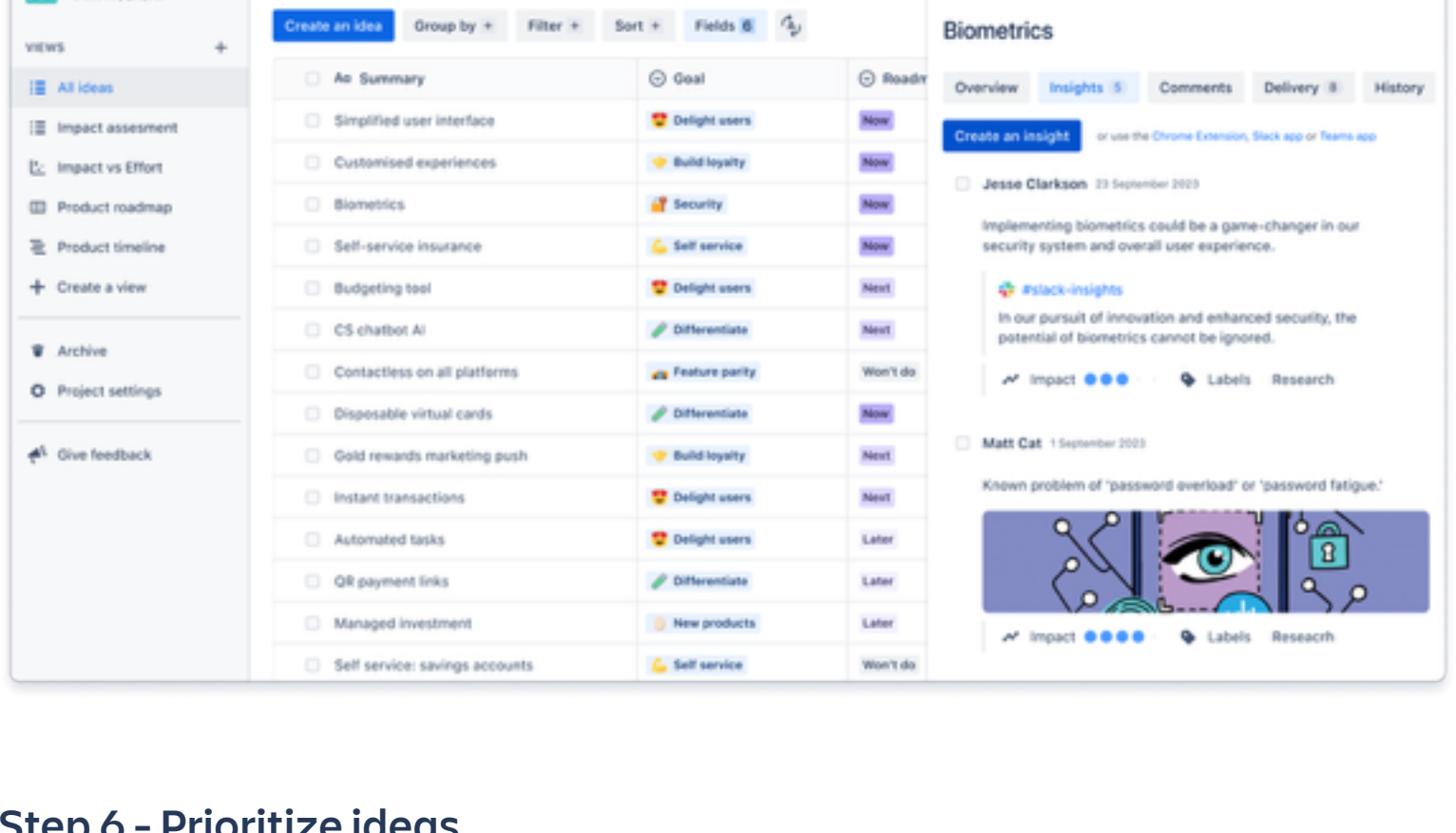
Learn more about [fields](#) and [how to create a custom field](#).

## Step 5 - Add insights

Ideas are better when they're enriched with insights. [Insights](#) can be customer quotes, product analytics, market research, and more.

There are two ways to gather insights:

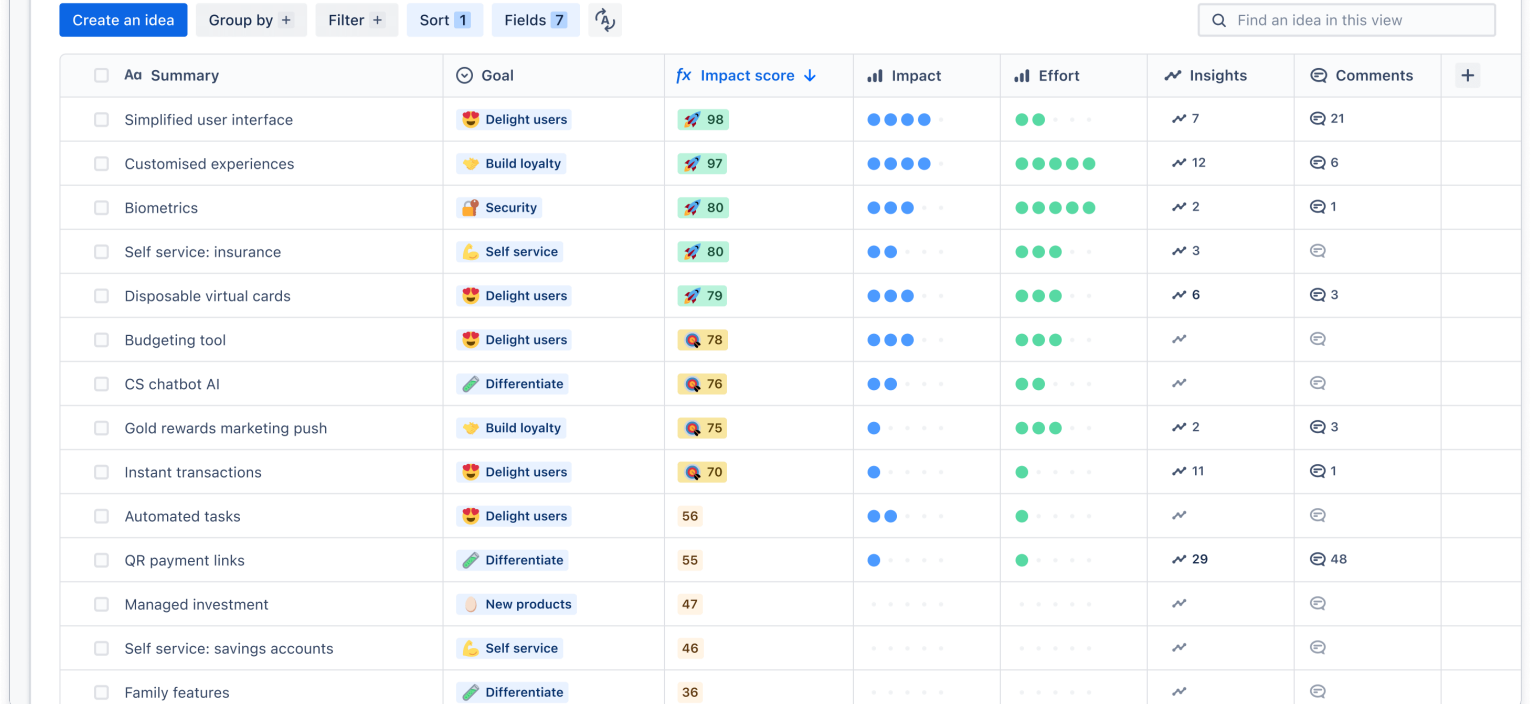
- 1 Within an idea
  - Click on an idea and click the **Insights** tab.
  - Click the blue **Create an insight** button and paste plain text or a link, like a Jira Service Management ticket or a Slack message
- 2 [Jira Product Discovery Chrome extension](#)
  - Highlight any text
  - Click on the extension in your Chrome browser
  - Select the idea you'd like to add to, or create a new idea, and click **Add**



## Step 6 - Prioritize ideas

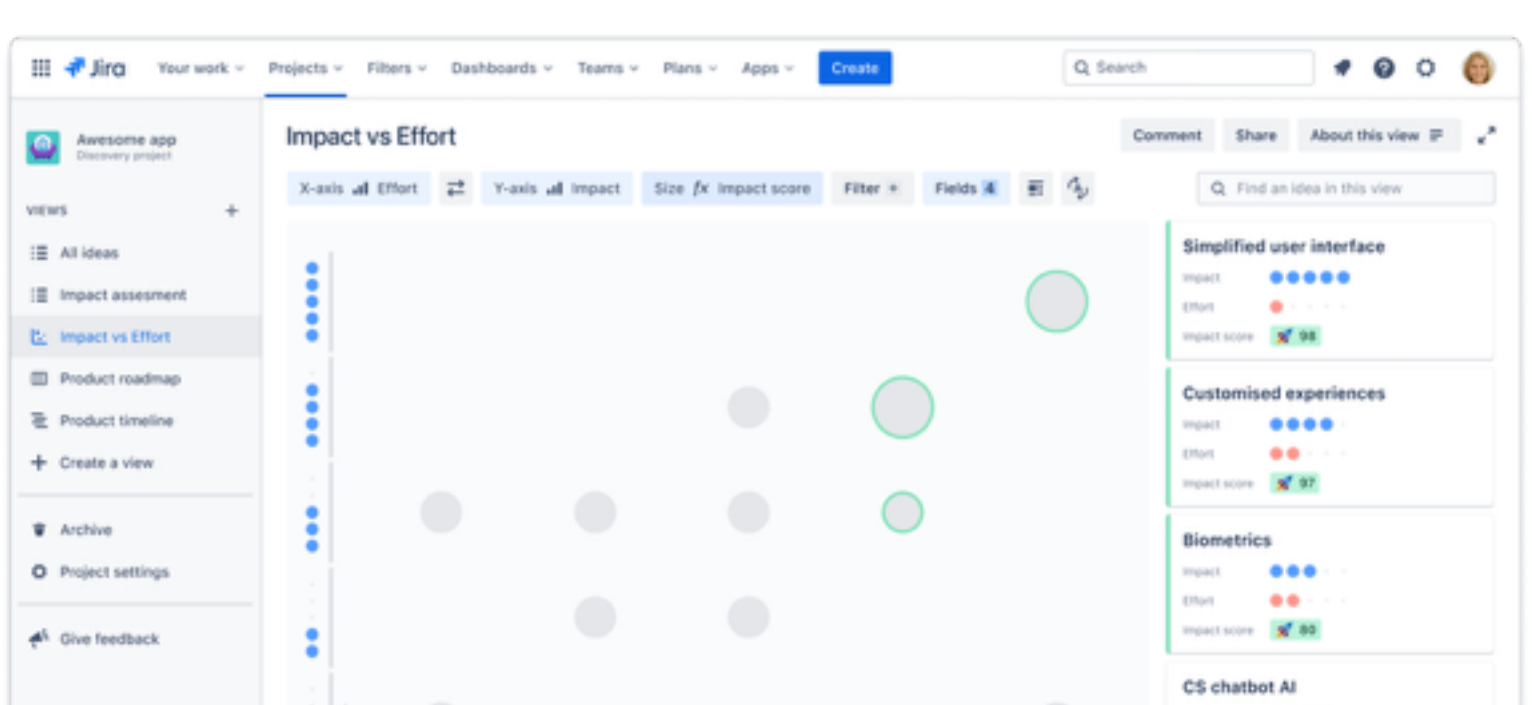
Now it's time to prioritize which ideas should come now versus later (or never). Prioritize based on criteria you care about (i.e Impact score) or use a method that works for your team (i.e RICE method).

Click **Create a view +** in the lefthand navigation to create a prioritization view. Select **Create a new list**. Add fields or create a custom formula based on how you want to prioritize your ideas. Sort ascending or descending to easily identify high priority ideas.



**i** Looking for inspiration on how other teams triage and prioritize? Watch our video on [how one team at Atlassian uses Jira Product discovery](#).

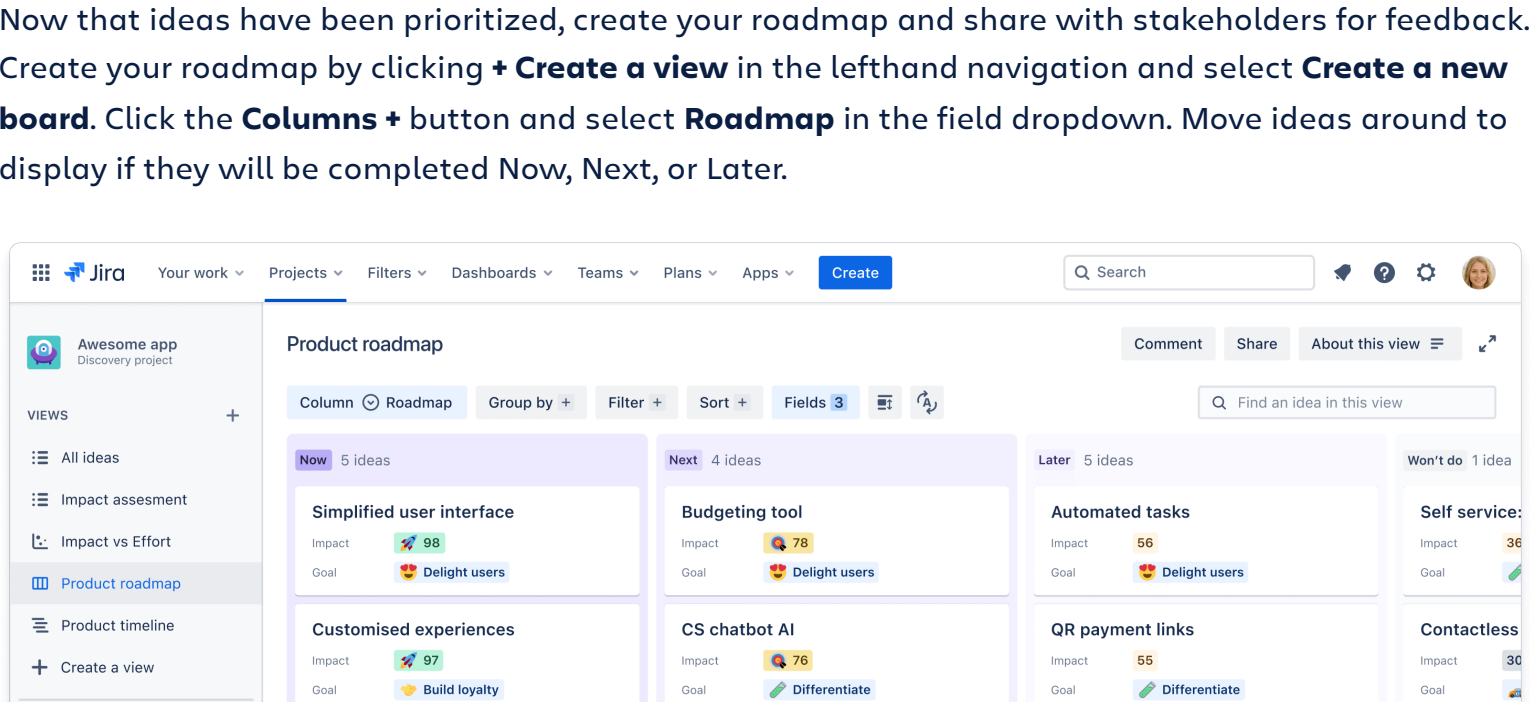
For an easy visual way to compare ideas against two fields, use a [matrix view](#). Click **Create a view +** in the lefthand navigation and select **Create a new matrix**. Move ideas around and customize cards for an easy to glance view.



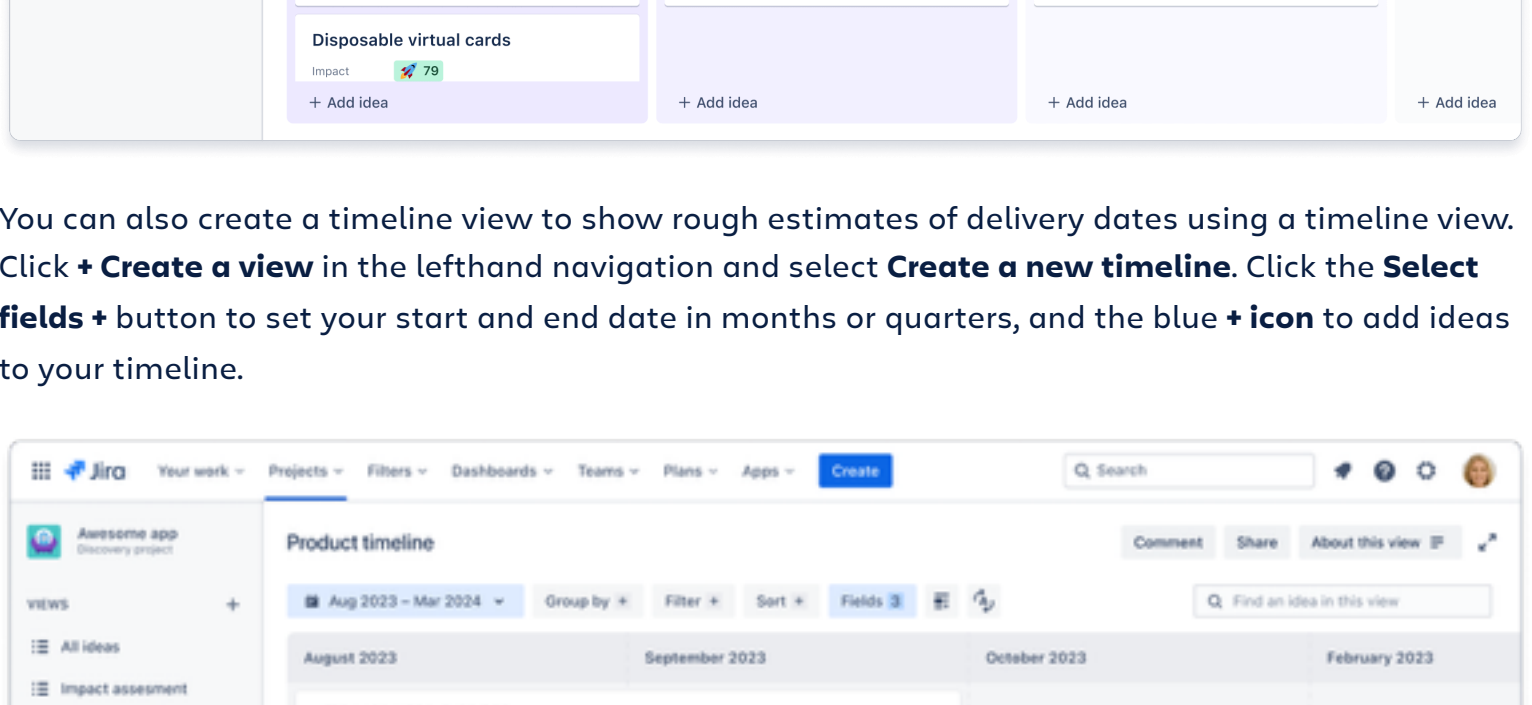
**i** For more examples, watch this [demo on using custom fields and views to prioritize and communicate roadmaps](#).

## Step 7 - Create and share roadmap

Now that ideas have been prioritized, create your roadmap and share with stakeholders for feedback. Create your roadmap by clicking **+ Create a view** in the lefthand navigation and select **Create a new board**. Click the **Columns +** button and select **Roadmap** in the field dropdown. Move ideas around to display if they will be completed Now, Next, or Later.



You can also create a timeline view to show rough estimates of delivery dates using a timeline view. Click **+ Create a view** in the lefthand navigation and select **Create a new timeline**. Click the **Select fields +** button to set your start and end date in months or quarters, and the blue **+ icon** to add ideas to your timeline.



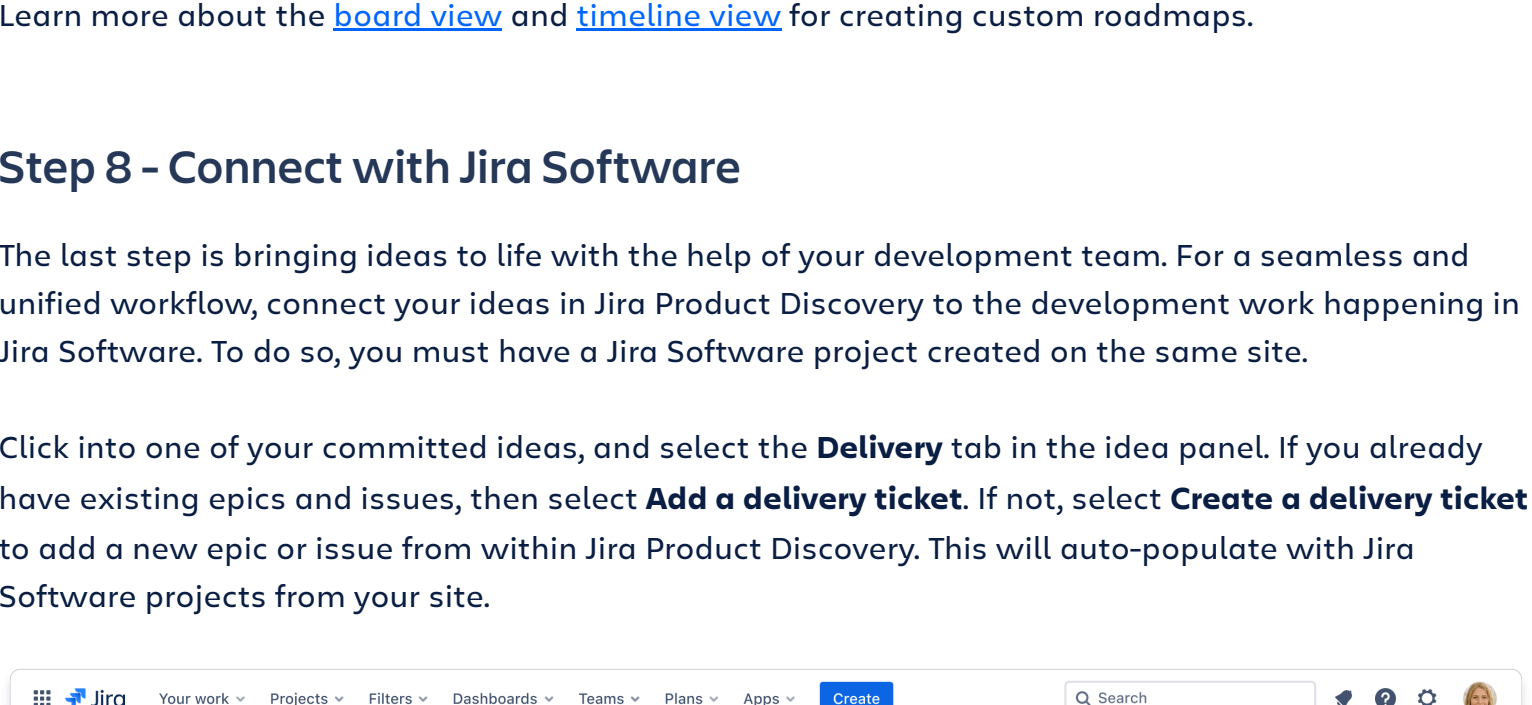
When ready, share a link with contributors for feedback via comments, votes, and reactions, or publish a read-only view to external stakeholders.

Learn more about the [board view](#) and [timeline view](#) for creating custom roadmaps.

## Step 8 - Connect with Jira Software

The last step is bringing ideas to life with the help of your development team. For a seamless and unified workflow, connect your ideas in Jira Product Discovery to the development work happening in Jira Software. To do so, you must have a Jira Software project created on the same site.

Click into one of your committed ideas, and select the **Delivery** tab in the idea panel. If you already have existing epics and issues, then select **Add a delivery ticket**. If not, select **Create a delivery ticket** to add a new epic or issue from within Jira Product Discovery. This will auto-populate with Jira Software projects from your site.



You are now able to track a helicopter view of progress for your Jira Software epics and issues directly from Jira Product Discovery using the fields **Delivery progress** and **Delivery status**. Many customers also choose to create a separate delivery view so they have one space within Jira Product Discovery to see high-level progress on the actual work happening.

	PRODUCTS	RESOURCES	LEARN
<b>Company</b>	Rovo	Technical support	Partners
<b>Careers</b>	Jira	Purchasing & licensing	Training & certification
<b>Events</b>	Jira Align	Atlassian Community	Documentation
<b>Blogs</b>	Jira Service Management	Knowledge base	Developer resources
<b>Investor Relations</b>	Confluence	Marketplace	Enterprise services
<b>Atlassian Foundation</b>	Trello	My account	
<b>Contact us</b>	Bitbucket		
	<a href="#">See all products →</a>	<a href="#">Create support ticket →</a>	<a href="#">See all resources →</a>