



Tool Administration - Day 8

1

Jira Fundamentals: Project Management Made Simple

Master the essentials of Atlassian Jira for effective project tracking and team collaboration

Training Period: 23rd July - 19th September, 2025

Focus: Jira Setup, Project Management, User Administration & Best Practices



Project Setup

Learn to create and configure projects



Board Configuration

Master Kanban and Scrum boards



User Management

Control access and permissions

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Day 8: Learning Objectives



"From Zero to Jira Hero in One Day"



Introduction to Jira

- Understand what Jira is and why it's essential
- Learn about Jira's role in project management
- Explore the Jira interface and navigation
- Understand key Jira terminology



Project Types in Jira

- Compare different project types
- Understand when to use each type
- Learn about templates and workflows
- Explore project customization options



Creating Projects

- Step-by-step project creation process
- Configure project settings and details

- Set up project categories and components
- Define project roles and responsibilities



Configuring Boards

- Create and customize Kanban boards
- Set up Scrum boards and sprints
- Configure columns, swimlanes, and filters
- Optimize board layouts for team workflow



Managing Users and Permissions

- Add and manage user accounts
- Configure permission schemes
- Set up groups and project roles
- Implement security best practices



Practical Skills

- Hands-on project setup exercises
- Real-world configuration scenarios
- Troubleshooting common issues
- Best practices and tips

💡 **By the End of Today**

You'll be able to set up complete Jira projects, configure boards, and manage users with confidence!



What is Jira?



The World's #1 Project Management Tool



Simple Definition

Jira is a powerful project management and issue tracking tool developed by Atlassian. It helps teams plan, track, and manage their work efficiently from start to finish.



What Jira Does

- **Issue Tracking:** Track bugs, tasks, and user stories
- **Project Management:** Plan and organize work
- **Team Collaboration:** Enable seamless teamwork
- **Workflow Management:** Automate processes
- **Reporting:** Generate insights and analytics
- **Integration:** Connect with other tools



Why Teams Love Jira

- **Flexibility:** Adapts to any workflow
- **Scalability:** Works for small teams to enterprises
- **Customization:** Tailored to your needs
- **Visibility:** Clear project status
- **Collaboration:** Keeps everyone aligned
- **Reliability:** Trusted by millions

Key Concept: Issues

In Jira, everything is an **"Issue"** - whether it's a bug to fix, a feature to build, a task to complete, or a story to implement. Issues are the building blocks of all work in Jira.



Bug

Something broken



Feature

New functionality



Task

Work to be done



Story

User requirement



Real-World Example

Imagine you're building a mobile app. You might have:

- **Story:** "As a user, I want to login with my email"
- **Task:** "Design the login screen"
- **Bug:** "Login button doesn't work on iOS"
- **Feature:** "Add social media login options"



Jira Interface Overview



Navigate Jira Like a Pro



Main Navigation Areas

Jira's interface is organized into logical sections that make it easy to find what you need:

1 Top Navigation Bar

- **Jira Logo:** Home button
- **Your Work:** Assigned to you
- **Projects:** All your projects
- **Filters:** Saved searches
- **Dashboards:** Custom views
- **Apps:** Additional tools

2 Project Sidebar

- **Backlog:** Planned work
- **Active Sprints:** Current work
- **Board:** Visual workflow
- **Reports:** Analytics
- **Issues:** All project items
- **Settings:** Configuration



Jira Interface Screenshot

Main dashboard showing navigation, project list, and recent activity

Live Demo: We'll explore this together!

Search & Filters

- Quick search bar
- Advanced search (JQL)
- Saved filters
- Recent items

Dashboards

- Customizable widgets
- Project overviews
- Team performance
- Personal workspace

Settings

- User preferences
- Project configuration
- System administration
- App management

Pro Tips for Navigation

- **Keyboard Shortcuts:** Press "?" to see all shortcuts
- **Quick Search:** Use "/" to quickly search for issues
- **Breadcrumbs:** Always visible at the top to show your location
- **Recent Items:** Access your recently viewed projects and issues



Essential Jira Terminology



Speak Jira Fluently



Core Concepts



Issue

Any piece of work - bug, task, story, or feature



Project

Collection of issues for a specific goal or team



Workflow

The path an issue takes from creation to completion



Board

Visual representation of your team's work



People & Roles



Assignee

Person responsible for working on the issue



Reporter

Person who created or reported the issue



Watcher

Person who wants to be notified of changes



Project Lead

Person responsible for the overall project



Agile Terms



Backlog

List of work items waiting to be done



Configuration Terms



Scheme

Sprint

Time-boxed period for completing work (usually 1-4 weeks)

Epic

Large piece of work that can be broken into smaller stories

Story Points

Estimation unit for measuring work complexity

Configuration template (workflow, permission, etc.)

Component

Subsection of a project (e.g., Frontend, Backend)

Version

Release or milestone marker

Label

Flexible tag for categorizing issues

Status Categories



To Do

Work not started



In Progress

Work being done



Done

Work completed

Remember This

Don't worry about memorizing everything! Jira has helpful tooltips and help text throughout the interface. The key is understanding the basic concepts so you can navigate confidently.



Project Types in Jira



Choose the Right Project Type for Your Team



Why Different Project Types?

Different teams work differently. Jira offers various project types to match your team's workflow, methodology, and needs. Each type comes with pre-configured settings, workflows, and boards.



Scrum Project

Best for: Teams using Scrum methodology

- Sprint planning and management
- Backlog prioritization
- Burndown charts and reports
- Story point estimation
- Sprint reviews and retrospectives

Perfect for: Development teams, Product teams



Kanban Project

Best for: Continuous flow of work

- Visual workflow management
- Work-in-progress limits
- Continuous delivery
- Flexible prioritization
- Cumulative flow diagrams

Perfect for: Support teams, Operations teams



Bug Tracking Project

Best for: Issue and bug management

- Bug reporting and tracking
- Issue prioritization
- Resolution workflows
- Quality assurance
- Customer support integration

Perfect for: QA teams, Support teams



Business Project

Best for: Non-technical teams

- Task management
- Process workflows
- Team collaboration
- Simple reporting
- Goal tracking

Perfect for: Marketing, HR, Finance teams

Quick Decision Guide

Choose Scrum if:

- You work in fixed-length sprints
- You need backlog management
- You do sprint planning meetings
- You want burndown charts

Choose Kanban if:

- Work flows continuously
- Priorities change frequently
- You want to limit work-in-progress
- You need flexible workflows



Project Types: Detailed Comparison



Feature-by-Feature Breakdown

Feature	 Scrum	 Kanban	 Bug Tracking	 Business
Sprint Planning	✓ Full Support	✗ Not Available	✗ Not Available	✗ Not Available
Backlog Management	✓ Advanced	⚠ Basic	⚠ Basic	⚠ Basic
Kanban Board	✓ Available	✓ Primary Feature	✓ Available	✓ Available
Story Points	✓ Built-in	⚠ Optional	✗ Not Typical	✗ Not Available
Burndown Charts	✓ Multiple Types	✗ Not Available	✗ Not Available	✗ Not Available
Cumulative Flow	⚠ Basic	✓ Advanced	⚠ Basic	⚠ Basic
Issue Types	Story, Bug, Task, Epic	Story, Bug, Task	Bug, Improvement, Task	Task, Sub-task
Complexity	High	Medium	Medium	Low
Learning Curve	Steep	Moderate	Easy	Very Easy

When to Use Each Type

Scrum Projects

- Software development teams
- Product development
- Teams that plan in iterations
- Need detailed reporting and metrics

Kanban Projects

- Support and maintenance teams
- Operations teams
- Continuous delivery workflows
- Unpredictable work patterns

Specialized Use Cases

Bug Tracking

- Quality assurance teams
- Customer support
- Issue management focus
- Simple workflow needs

Business Projects

- Non-technical teams
- Marketing campaigns
- HR processes
- Simple task management

Pro Tip

You can always change project types later, but it's easier to start with the right one. When in doubt, start with Kanban - it's the most flexible and can be adapted to most workflows.



Project Templates and Workflows



Understanding the Foundation of Every Project



What are Templates?

Templates are pre-configured project setups that include workflows, issue types, screens, and permissions. They provide a starting point that matches common team practices and can be customized as needed.



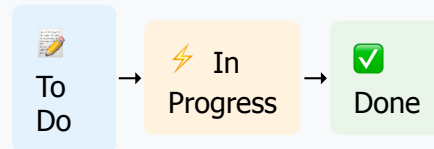
Template Components

- **Issue Types:** Bug, Story, Task, Epic, etc.
- **Workflows:** Status transitions and rules
- **Screens:** Fields shown when creating/editing
- **Permissions:** Who can do what
- **Notifications:** Email and alert settings



Understanding Workflows

A workflow defines the path an issue takes from creation to completion:



Each transition can have conditions, validators, and post-functions.

- **Board Configuration:**
Columns and swimlanes

Popular Template Examples

Scrum Template **Includes:**

- Epic, Story, Bug, Task issue types
- Sprint-based workflow
- Story point field
- Backlog and sprint boards
- Burndown chart configuration

Kanban Template **Includes:**

- Story, Bug, Task issue types
- Simple workflow (To Do → Done)
- Kanban board with WIP limits
- Cumulative flow diagram
- Continuous delivery focus

1 Choose Template

Select based on your team's methodology and needs

2 Customize

Modify workflows, fields, and permissions to match your process

3 Iterate

Refine and improve based on team feedback and usage

Workflow Customization Options

Status Configuration:

- Add custom statuses
- Define status categories

Transition Rules:

- Who can perform transitions
- Required fields for transitions

- Set status colors
- Configure resolution types
- Automatic actions on transition
- Validation rules

Important Considerations

- **Start Simple:** Begin with standard templates and customize gradually
- **Team Input:** Involve your team in workflow design decisions
- **Test Changes:** Use a test project to validate workflow changes
- **Document Process:** Keep track of customizations and reasons



Creating Your First Project

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Step-by-Step Project Creation



Before You Start

Creating a project is more than just clicking "Create." Good planning ensures your project serves your team effectively from day one.



Pre-Creation Checklist

- **Project Purpose:** What will this project track?
- **Team Members:** Who needs access?
- **Workflow Type:** Scrum, Kanban, or other?
- **Issue Types:** What work will you track?
- **Permissions:** Who can do what?
- **Integration Needs:** Other tools to connect?



Project Information Needed

- **Project Name:** Clear, descriptive name
- **Project Key:** Short abbreviation (3-10 chars)
- **Project Type:** Based on your workflow
- **Template:** Starting configuration
- **Lead:** Project administrator
- **Description:** Project purpose and scope



Step-by-Step Creation Process

1

Access Project Creation

Navigate to **Projects** → **Create Project** or use the "+" button in the top navigation

2

Choose Project Type

Select from Scrum, Kanban, Bug Tracking, or Business project based on your needs

3

Select Template

Choose a template that matches your workflow or start with a basic template

4

Configure Details

Enter project name, key, and description. Choose project lead and access settings

5

Review and Create

Double-check all settings and click "Create" to generate your new project

6

Initial Configuration

Set up boards, add team members, and customize workflows as needed



Project Key Best Practices

✓ **Good Project Keys:**

- **WEBAPP** - Web Application
- **MOBILE** - Mobile App Project
- **SUPPORT** - Customer Support
- **INFRA** - Infrastructure Team

✗ **Avoid These:**

- **PROJ1** - Too generic
- **TEST** - Confusing purpose
- **ABC** - No meaning
- **VERYLONGPROJECTKEY** - Too long



Live Demo: Project Creation

We'll walk through creating a sample project together, showing each step in the Jira interface

Hands-on Exercise: You'll create your own practice project!



Project Settings and Configuration



Fine-Tune Your Project for Success



Why Configure Your Project?

Default settings are a good start, but customizing your project ensures it matches your team's specific needs, processes, and terminology. Proper configuration improves adoption and productivity.



Essential Settings

Project Details:

- **Name & Description:** Clear project identity
- **Project Lead:** Primary administrator
- **Default Assignee:** Who gets unassigned issues
- **Avatar:** Visual project identifier

Access Control:

- **Access Level:** Open, restricted, or private



Components and Versions

Components (Project Subsections):

- **Frontend:** UI/UX related work
- **Backend:** Server-side development
- **Database:** Data layer issues
- **Documentation:** User guides, specs

Versions (Release Tracking):

- **v1.0:** Initial release
- **v1.1:** Bug fix release

- **Permission Scheme:** Who can do what
- **Issue Security:** Sensitive issue handling

- **v2.0:** Major feature release
- **Future:** Planned features

Configuration Walkthrough

Accessing Project Settings

1. Go to your project
2. Click "Project Settings" in the sidebar
3. Navigate through different configuration sections
4. Make changes and save

Key Configuration Areas

- **Details:** Basic project information
- **People:** Team members and roles
- **Issue Types:** Types of work items
- **Workflows:** Process definitions
- **Screens:** Field layouts
- **Permissions:** Access control



Components Setup

Organize work by functional areas or team responsibilities



Version Management

Track releases and plan future development cycles

Example: v1.0, v1.1, v2.0-beta



Project Roles

Define who can perform specific actions in the project

Example: Developers, Testers, Managers

Example: Frontend,
Backend, QA,
DevOps



Configuration Best Practices



Do This:

- Start with simple configurations
- Involve team in decision making
- Document configuration choices
- Test changes in a safe environment
- Train team on new configurations



Avoid This:

- Over-complicating initial setup
- Making changes without team input
- Frequent configuration changes
- Ignoring user feedback
- Not backing up configurations



Important Notes

- **Permissions:** Some configuration changes require project admin rights
- **Impact:** Changes affect all project users immediately
- **Testing:** Use a test project to validate major changes
- **Communication:** Notify team members of significant changes



Project Categories and Organization



Keep Your Projects Organized and Discoverable



Why Organize Projects?

As your organization grows, you'll have many projects. Good organization helps users find relevant projects quickly, improves navigation, and makes administration easier. Categories are your primary organizational tool.



Project Categories

Categories group related projects together and can be used for:

- **Department-based:** Engineering, Marketing, HR
- **Product-based:** Mobile App, Web Platform, API
- **Function-based:** Development, Support, Operations
- **Status-based:** Active, Archived, Planning



Category Benefits

- **Improved Navigation:** Easier project discovery
- **Better Permissions:** Category-based access control
- **Cleaner Interface:** Organized project lists
- **Reporting:** Category-based analytics
- **Administration:** Bulk operations on categories

- **Client-based:** Customer A, Customer B, Internal

- **User Experience:** Logical project grouping



Example Category Structures



By Department:

- **Engineering**
 - Web Application
 - Mobile App
 - Infrastructure
- **Marketing**
 - Campaign Management
 - Content Creation
 - Social Media



By Product:

- **Platform Core**
 - Authentication Service
 - User Management
 - Payment System
- **Customer Facing**
 - Web Portal
 - Mobile Apps
 - Customer Support



Setting Up Categories

1

Access Administration

Go to **Settings** → **Projects** → **Project categories** (requires admin rights)

2

Create Categories

Add new categories with descriptive names and clear descriptions

3

Assign Projects

Move existing projects to appropriate categories or set category during creation

4

Configure Permissions

Set category-level permissions if needed for access control



Naming Strategy

Use clear, consistent naming that reflects your organization structure

Good: "Engineering - Backend"
Bad: "Stuff - Team 1"



Hierarchy Planning

Plan your category structure before creating to avoid reorganization later

Tip: Start broad, then add subcategories as needed



Regular Review

Periodically review and update categories as your organization evolves

Schedule: Quarterly or bi-annual reviews



Pro Tips for Project Organization

- **Start Simple:** Begin with a few broad categories and refine over time
- **User Input:** Ask teams how they naturally group their work
- **Consistency:** Use consistent naming conventions across categories
- **Documentation:** Document the purpose and scope of each category
- **Training:** Help users understand the category structure



Introduction to Jira Boards



Visualize Your Team's Work Flow



What are Jira Boards?

Boards are visual representations of your team's work that help you track progress, identify bottlenecks, and manage workflow efficiently. They transform your issues into an easy-to-understand visual format.



Scrum Boards

Sprint-based workflow visualization

- Backlog management
- Sprint planning interface
- Sprint progress tracking
- Burndown charts
- Sprint reports and metrics
- Story point estimation

Best for: Teams using Scrum methodology with fixed sprints



Kanban Boards

Continuous flow workflow visualization

- Continuous workflow
- Work-in-progress (WIP) limits
- Flexible prioritization
- Cumulative flow diagrams
- Cycle time tracking
- Real-time updates

Best for: Support teams, operations, continuous delivery

Board Components



Columns

Represent workflow stages (To Do, In Progress, Done)



Cards

Individual issues displayed as moveable cards



Swimlanes

Horizontal groupings (by assignee, priority, etc.)

Board Visualization Example



To Do

PROJ-123

Login page design

PROJ-124

Fix login bug



In Progress

PROJ-125

User dashboard



Done

PROJ-122

Database setup

PROJ-121

Project planning



Why Boards Are Powerful

- **Visual Clarity:** See all work at a glance
- **Real-time Updates:** Changes reflect immediately
- **Drag & Drop:** Easy status updates
- **Team Collaboration:** Shared understanding of progress
- **Bottleneck Identification:** Spot workflow issues quickly
- **Customizable:** Adapt to your team's needs





Configuring Kanban Boards



Master Kanban Board Setup and Customization



Kanban Board Configuration Overview

Kanban boards are highly customizable to match your team's workflow. Proper configuration ensures the board reflects your actual process and provides maximum value for tracking and managing work.



Step-by-Step Kanban Configuration

1

Create or Access Board

Go to your project → Boards → Create Board or select existing Kanban board

2

Configure Columns

Board Settings → Columns → Add, remove, or modify columns to match your workflow

3

Set Column Constraints

Configure minimum/maximum limits for each column to control work-in-progress

4

Configure Swimlanes

Set up horizontal groupings by assignee, priority, epic, or custom fields

5

Set Up Filters

6

Customize Card Layout

Define which issues appear on the board using JQL (Jira Query Language)

Choose which fields to display on issue cards for quick information access

Column Configuration

Common Column Setups:

- **Basic:** To Do → In Progress → Done
- **Development:** Backlog → Development → Testing → Done
- **Support:** New → Investigating → Waiting → Resolved
- **Marketing:** Ideas → Planning → Creating → Review → Published

Column Mapping:

Each column maps to one or more issue statuses from your workflow.

Swimlane Options

Popular Swimlane Configurations:

- **Assignee:** Group by person responsible
- **Priority:** High, Medium, Low priority lanes
- **Epic:** Group by larger work items
- **Component:** Frontend, Backend, etc.
- **Issue Type:** Stories, Bugs, Tasks
- **Custom Field:** Team, Client, etc.

Work-in-Progress (WIP) Limits

Why Use WIP Limits?

- Prevent team overload
- Identify bottlenecks quickly

Setting WIP Limits:

- **Start Conservative:** Begin with lower limits

- Improve focus and quality
- Encourage collaboration
- Reduce context switching
- **Team Size Based:** Usually 1-2 items per person
- **Column Specific:** Different limits per column
- **Monitor & Adjust:** Refine based on experience



Card Appearance

Customize what information appears on issue cards

Options: Assignee, Priority, Due Date, Labels, Story Points



Board Filters

Control which issues appear on your board using JQL queries

Example: project = "MYPROJ" AND assignee = currentUser()



Quick Filters

Add one-click filters for common views (My Issues, High Priority, etc.)

Benefit: Instant board filtering without complex queries

⚠ Configuration Best Practices

- **Start Simple:** Begin with basic columns and add complexity gradually
- **Team Input:** Involve the team in board design decisions
- **Regular Review:** Periodically assess and adjust board configuration
- **Test Changes:** Make incremental changes and monitor impact
- **Document Decisions:** Keep track of why certain configurations were chosen



Configuring Scrum Boards



Sprint-Based Workflow Configuration



Scrum Board Essentials

Scrum boards are designed for teams using the Scrum framework with fixed-length sprints. They provide specialized features for backlog management, sprint planning, and progress tracking that Kanban boards don't offer.



Scrum Board Features

- **Backlog Management:** Prioritized list of work
- **Sprint Planning:** Drag issues into sprints
- **Sprint Board:** Active sprint visualization
- **Burndown Charts:** Progress tracking
- **Story Points:** Effort estimation
- **Sprint Reports:** Detailed analytics



Board Views

Backlog View:

- Product backlog prioritization
- Sprint planning interface
- Story point estimation
- Epic and version management

Active Sprint View:

- Current sprint progress
- Drag-and-drop status updates
- Sprint burndown chart
- Team workload visibility

- **Velocity Tracking:** Team performance metrics



Scrum Board Configuration Steps

1

Create Scrum Board

Project → Boards → Create Board → Choose Scrum template

2

Configure Columns

Set up workflow columns (To Do, In Progress, Done) and map to statuses

3

Set Up Estimation

Configure story points or time-based estimation for sprint planning

4

Configure Sprints

Set default sprint duration and configure sprint settings

5

Customize Card Fields

Choose which fields to display on issue cards (assignee, story points, etc.)

6

Set Up Reports

Configure burndown charts and other sprint reports



Sprint Planning Configuration

Estimation Setup:

- **Story Points:** Fibonacci sequence (1,2,3,5,8,13)

Sprint Settings:

- **Duration:** 1-4 weeks (2 weeks common)

- **Time Tracking:** Hours or days
- **T-Shirt Sizes:** XS, S, M, L, XL
- **Custom Scale:** Define your own values
- **Start Day:** Monday, Tuesday, etc.
- **Working Days:** Exclude weekends/holidays
- **Capacity:** Team velocity planning



Burndown Charts

Visual progress tracking showing work remaining vs. time

Types: Sprint burndown, Release burndown, Epic burndown



Velocity Tracking

Measure team's delivery capacity over multiple sprints

Use: Sprint planning, capacity forecasting



Backlog Grooming

Prioritize and estimate backlog items for future sprints

Features: Drag-drop prioritization, bulk estimation

Scrum Board Best Practices

Do This:

- Keep sprint duration consistent
- Involve team in estimation
- Review velocity regularly
- Use burndown charts for daily standups
- Maintain a well-groomed backlog

Avoid This:

- Changing sprint scope mid-sprint
- Ignoring velocity trends
- Over-committing in sprint planning
- Skipping retrospectives
- Not updating story points

Pro Tips for Scrum Success

- **Start with Standard Settings:** Use default configurations initially
- **Team Involvement:** Include the team in board configuration decisions
- **Regular Reviews:** Assess board effectiveness in retrospectives
- **Gradual Customization:** Add complexity as team matures
- **Training:** Ensure team understands Scrum principles

User Management in Jira

Control Access and Collaboration

Why User Management Matters

Proper user management ensures the right people have access to the right projects with appropriate permissions. It's crucial for security, collaboration, and maintaining organized workflows across your organization.

User Types in Jira

Licensed Users:

- **Jira Software Users:** Full access to software features
- **Jira Core Users:** Basic project management
- **Jira Service Management:** Service desk access

Special User Types:

- **Administrators:** System-wide control
- **Project Admins:** Project-level control

User Management Levels

Global Level:

- System administration
- User account creation
- Global permissions
- License management

Project Level:

- Project access control
- Role assignments
- Project-specific permissions
- Team member management

- **Customers:** Limited portal access

Key User Management Concepts



Users

Individual accounts with login credentials



Groups

Collections of users for easier management



Roles

Project-specific user functions

+ Adding Users

1. **Access User Management:** Settings → User Management
2. **Create User:** Click "Create User" button
3. **Enter Details:** Email, full name, username
4. **Set Password:** Temporary or permanent
5. **Assign Groups:** Add to relevant groups
6. **Send Invitation:** Email notification to user



Managing Existing Users

- **Edit Profile:** Update user information
- **Reset Password:** Help with login issues
- **Deactivate User:** Temporarily disable access
- **Change Groups:** Modify permissions
- **View Activity:** Monitor user actions
- **Delete User:** Permanent removal (careful!)

User Management Best Practices

- **Principle of Least Privilege:** Give users minimum necessary access
- **Regular Audits:** Review user access periodically
- **Deactivate vs Delete:** Deactivate users who might return
- **Group Management:** Use groups instead of individual permissions
- **Onboarding Process:** Standardize new user setup



Permissions and Security



Secure Your Jira Environment



Understanding Jira Permissions

Jira uses a multi-layered permission system that controls what users can see and do. Understanding this system is crucial for maintaining security while enabling productive collaboration.



Permission Hierarchy

1

Global Permissions

System-wide access control

2

Project Permissions

Project-specific access

3

Issue Security

Individual issue access



Permission Types

Project Permissions:

- **Browse Projects:** View project content
- **Create Issues:** Add new work items
- **Edit Issues:** Modify existing issues
- **Delete Issues:** Remove issues
- **Assign Issues:** Change assignees
- **Resolve Issues:** Mark as complete

- **Administer Projects:**

Manage settings

Permission	Description	Typical Users	Risk Level
Browse Projects	View project and its issues	All team members	Low
Create Issues	Add new issues to project	Team members, stakeholders	Low
Edit Issues	Modify issue details	Assignees, project members	Medium
Delete Issues	Permanently remove issues	Project leads, admins	High
Administer Projects	Manage project settings	Project administrators	High

Groups and Roles

Groups (Global):

- **jira-administrators:** Full system access
- **jira-software-users:** Software license holders
- **jira-core-users:** Basic license holders
- **developers:** Custom development team
- **managers:** Custom management group

Project Roles:

- **Administrators:** Project management
- **Developers:** Development team
- **Users:** General project access
- **Viewers:** Read-only access
- **Custom Roles:** Specific to needs



Permission Schemes

Templates that define who can do what in projects

Benefit: Consistent permissions across projects



Issue Security

Control access to specific sensitive issues

Use Case: Confidential bugs, security issues



Field Security

Hide or protect specific fields from certain users

Example: Salary info, customer data



Security Best Practices

- **Least Privilege:** Grant minimum necessary permissions
- **Regular Audits:** Review permissions quarterly
- **Group Management:** Use groups instead of individual permissions
- **Role Clarity:** Clearly define what each role can do
- **Documentation:** Document permission decisions and changes
- **Testing:** Test permission changes in a safe environment

Hands-On Exercise: Complete Project Setup



Put Your Knowledge into Practice



Exercise Objective

Create a complete Jira project from scratch, configure boards, and set up user access. This exercise integrates all the concepts we've covered today into a real-world scenario.



Exercise Scenario

Scenario: You're setting up a Jira project for a new mobile app development team. The team consists of 2 developers, 1 designer, 1 QA tester, and 1 project manager. They want to use Scrum methodology with 2-week sprints.



Part 1: Project Creation (15 minutes)

1. Create Project:

- Name: "Mobile App Development"



Part 2: Board Configuration (15 minutes)

1. Configure Scrum Board:

- Set up columns: To Do, In Progress, Review, Done

- Key: "MOBILE"
- Type: Scrum
- Template: Scrum template

2. **Configure Project Details:**

- Add project description
- Set project avatar
- Configure default assignee

3. **Set Up Components:**

- Frontend (iOS/Android)
- Backend (API)
- Design (UI/UX)
- Testing (QA)

- Map columns to workflow statuses
- Configure card layout (show assignee, story points)

2. **Set Up Estimation:**

- Enable story points
- Use Fibonacci sequence (1,2,3,5,8,13)
- Configure sprint duration (2 weeks)

3. **Create Sample Issues:**

- 2 Epics (User Authentication, Core Features)
- 5 User Stories
- 3 Tasks
- 2 Bugs

Part 3: User Management (10 minutes)

1. **Create User Groups:**

- mobile-developers
- mobile-designers
- mobile-qa
- mobile-managers

2. **Add Team Members:**

- Create 5 test users

Part 4: Testing & Validation (10 minutes)

1. **Test Board Functionality:**

- Move issues between columns
- Create and start a sprint
- View burndown chart

2. **Validate Permissions:**

- Assign to appropriate groups
- Set project roles

3. **Configure Permissions:**

- Developers: Create, Edit, Assign issues
- QA: Create, Edit issues, Resolve
- Manager: All permissions
- Designer: Create, Edit issues

- Test different user access levels
- Verify group memberships
- Check project visibility

3. **Review Configuration:**

- Verify all components are set up
- Check board configuration
- Confirm user assignments

Success Criteria

Project Setup Complete:

- Project created with correct details
- Components configured
- Sample issues created
- Project accessible to team

Team Ready to Work:

- Board configured for Scrum workflow
- Users added with correct permissions
- Sprint can be created and started
- Issues can be moved through workflow

Exercise Tips

- **Work in Pairs:** Collaborate with a partner for better learning
- **Ask Questions:** Don't hesitate to ask for help

- **Take Notes:** Document any challenges or insights
- **Experiment:** Try different configurations to see what works
- **Share Results:** Compare your setup with others



Day 8 Summary & Next Steps



You've Mastered Jira Fundamentals!



What You've Accomplished Today

Congratulations! You've built a solid foundation in Jira administration. You now understand the core concepts and have hands-on experience with project setup, board configuration, and user management.



Skills Mastered

- **Jira Fundamentals:** Interface, terminology, concepts
- **Project Types:** Scrum, Kanban, Bug Tracking, Business
- **Project Creation:** Setup, configuration, organization
- **Board Configuration:** Kanban and Scrum board setup
- **User Management:** Adding users, groups, permissions



Practical Experience

- **Created:** Complete project from scratch
- **Configured:** Scrum board with proper workflow
- **Organized:** Components and project structure
- **Managed:** Users, groups, and permissions
- **Tested:** End-to-end functionality
- **Validated:** Security and access controls

- **Security:** Permission schemes, access control

Coming Up: Days 9 & 10

17 **Day 9: Advanced Jira Administration**

- Custom workflows and automation
- Advanced reporting and dashboards
- Jira integrations and apps
- Performance optimization
- Backup and maintenance

17 **Day 10: Enterprise Jira & Best Practices**

- Scaling Jira for large organizations
- Advanced security configurations
- Compliance and governance
- Troubleshooting common issues
- Migration and upgrade strategies



Continue Learning

Practice with your own projects and explore advanced features

Tip: Set up a personal Jira instance for experimentation



Share Knowledge

Help colleagues and team members with Jira setup and best practices

Impact: Become the Jira expert in your organization



Apply Skills

Implement what you've learned in real projects and workflows

Goal: Improve team productivity and collaboration

Key Takeaways

- **Start Simple:** Begin with basic configurations and add complexity gradually
- **User-Centric:** Always consider the end-user experience in your configurations
- **Security First:** Implement proper permissions and access controls from the start
- **Iterate and Improve:** Regularly review and refine your Jira setup
- **Documentation:** Keep track of configurations and decisions for future reference
- **Team Collaboration:** Involve your team in Jira setup and configuration decisions

Congratulations!

You're now equipped with the fundamental skills to set up and manage Jira projects effectively. Tomorrow, we'll dive deeper into advanced administration and enterprise-level configurations.

Ready for Day 9? Let's continue the journey! 

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