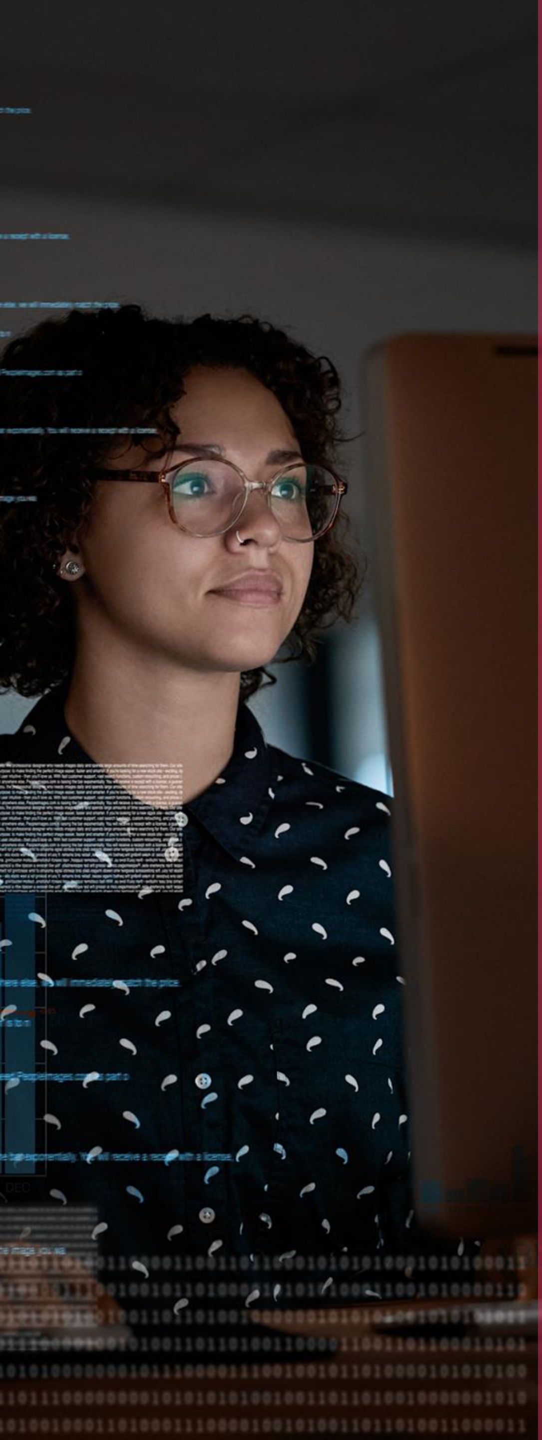


JIRA

Creating & Setting Up Projects

Day 2 of 3

Overview

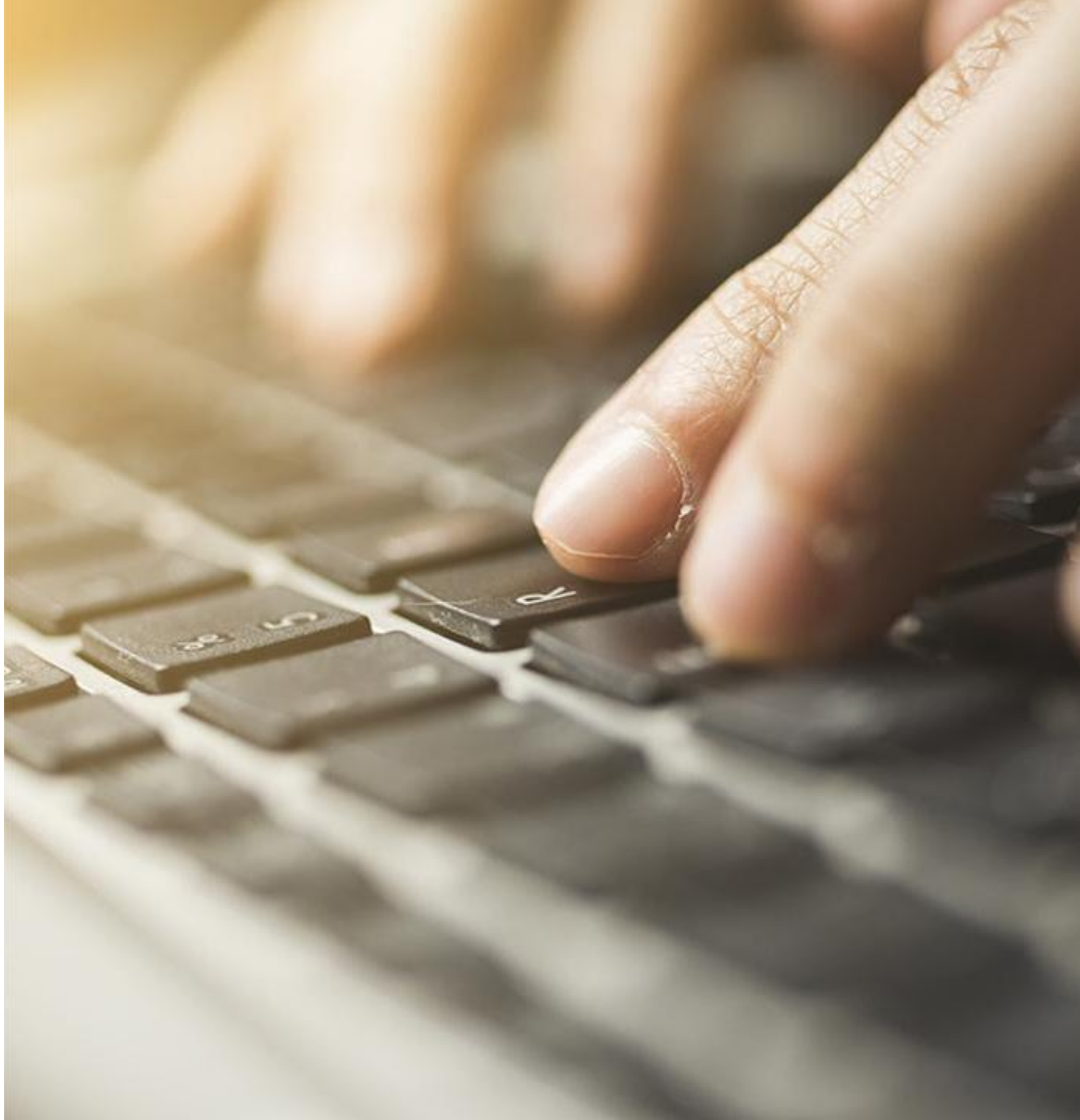
Jira allows you to quickly create and manage projects.

- In order to start using Jira you will need to know how to sign in an navigate the application interface.
- Once you have familiarized yourself with the interface you can start creating projects.
- Jira has two project types Classic and Next Gen. Each project has its own advantages and templates to match your project needs.
- After creating projects, you may need to assign or update your project lead. You can also assign and create workflows to help your projects stay on track.
- If you’re working in a multinational environment, it's important to know how to set up your Jira language and regional settings to be sure everyone is on the same page.

Objectives

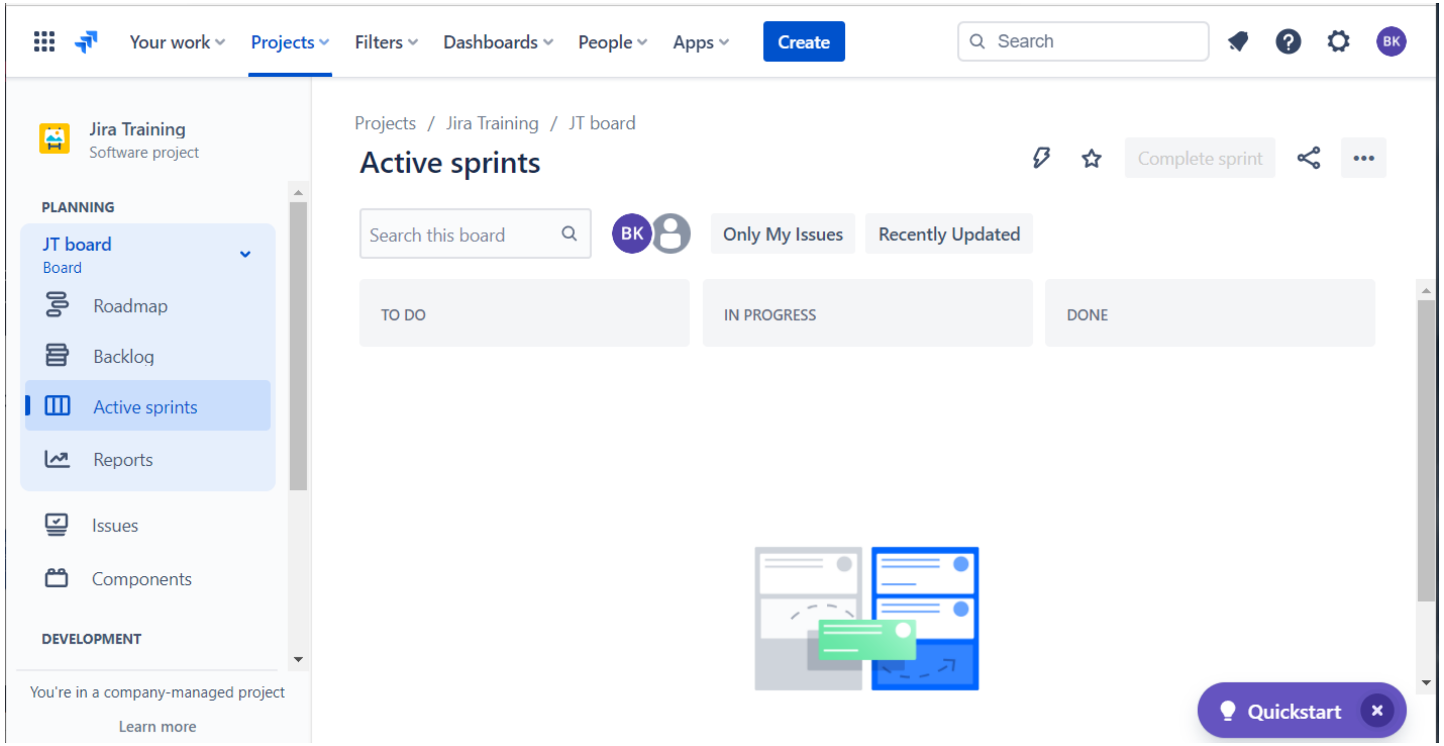
In this course, you will learn how to:

- **Sign in** and **Navigate** Jira
- Create a Project
- Add **users, groups, roles** and **permissions**
- Customize **workflows** and schemas
- Configuring **attachments** and **regional settings**



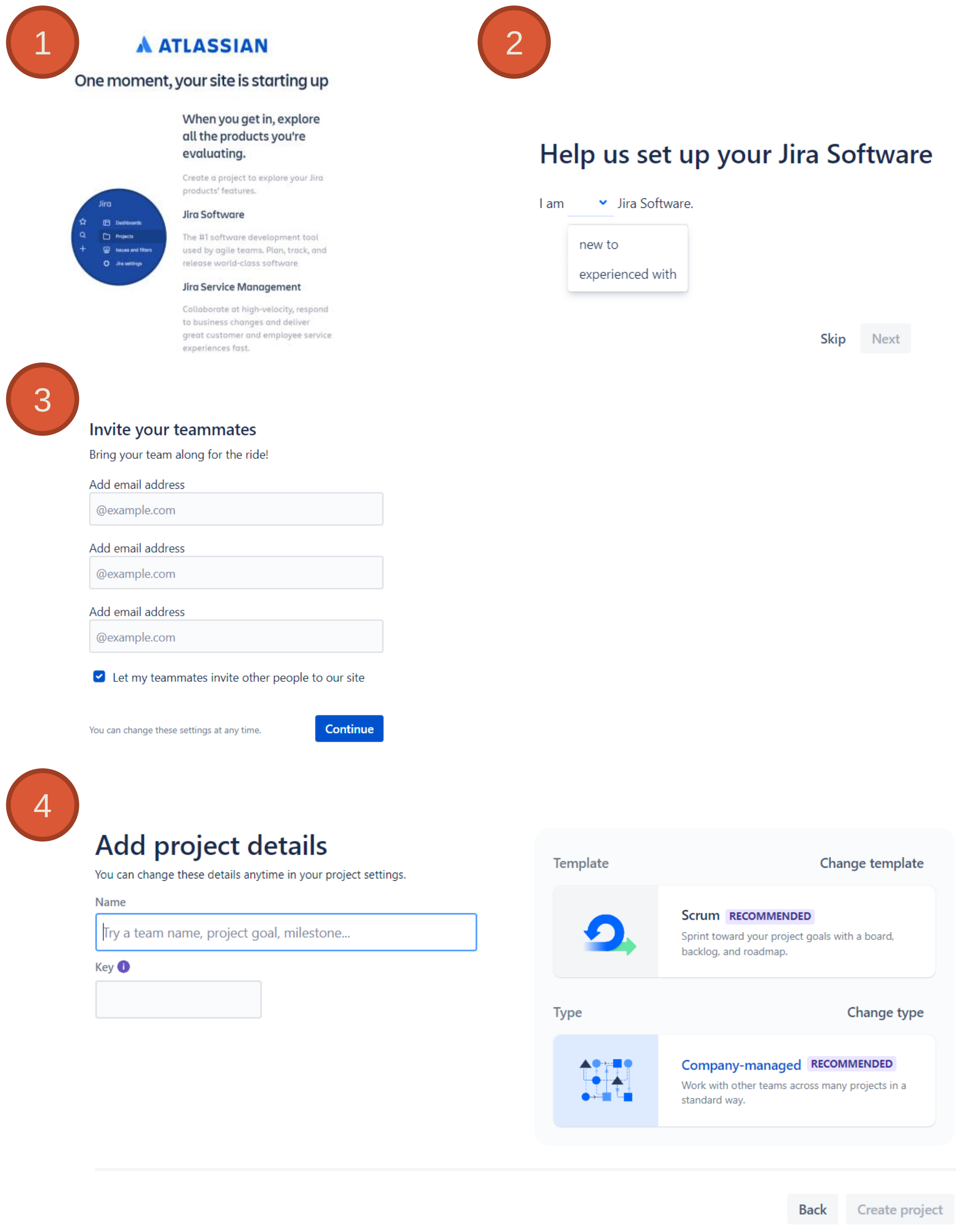
Sign in and Navigate Jira

When using Jira for the first time, you'll need to know how to login and navigate the application interface. In this section, you will discover how to identify and access the key tools that Jira has to offer.



Register for Jira

On the Jira site, locate the download option. Or register with your organization to receive a download.

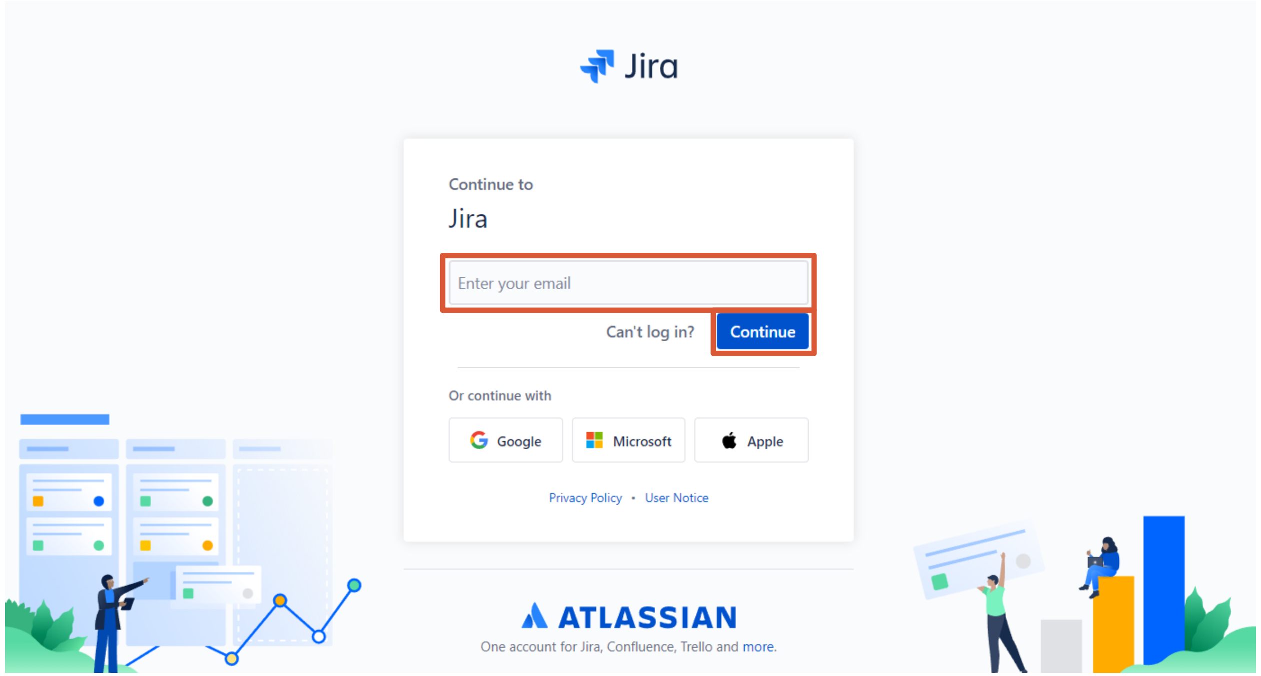


Signin to your Account

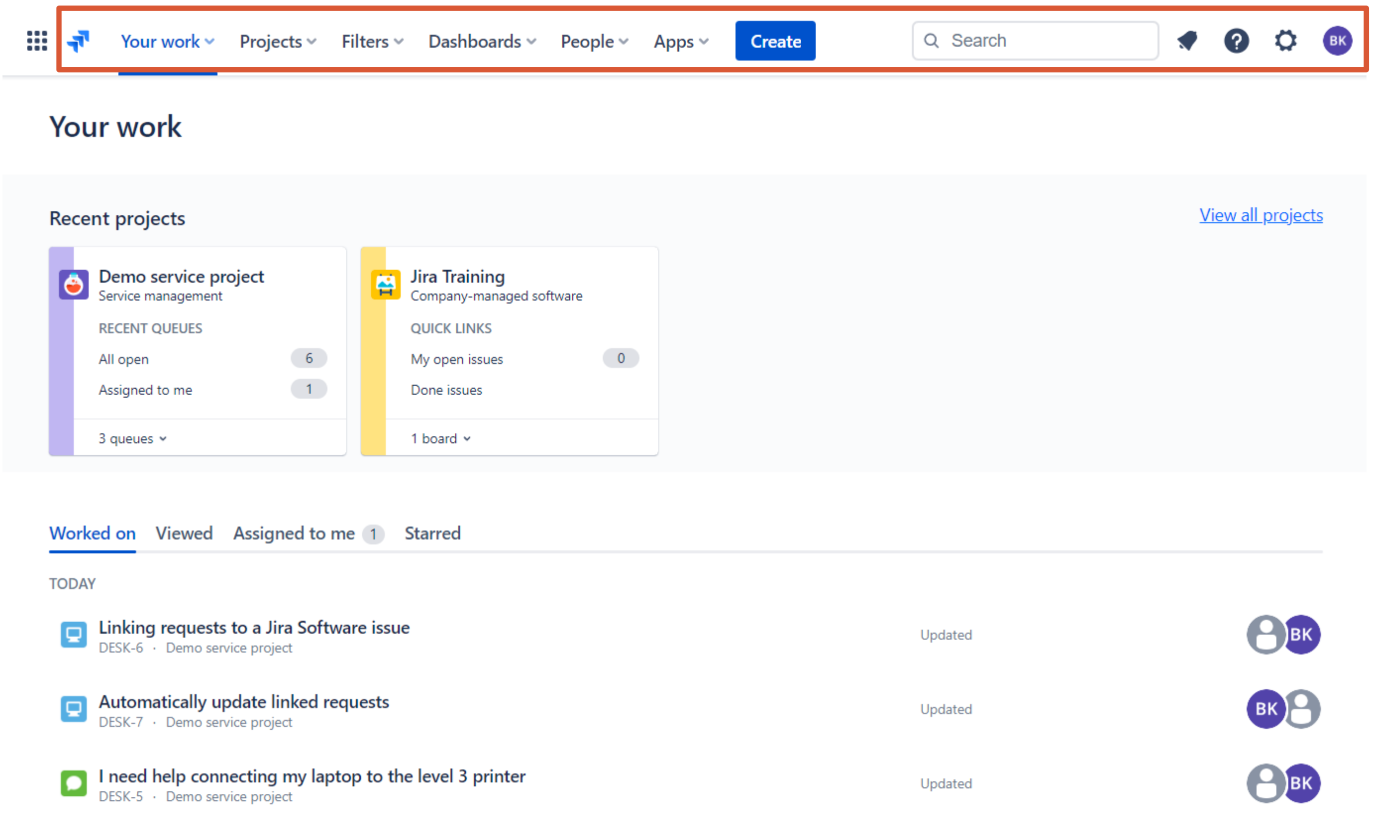
- Sign in with email/password
- Click **Continue**

Signing in

If this is your first-time logging in you will need to create a password. If you have forgotten your password your admin will need to re-set it and you will receive an email to create a new password.



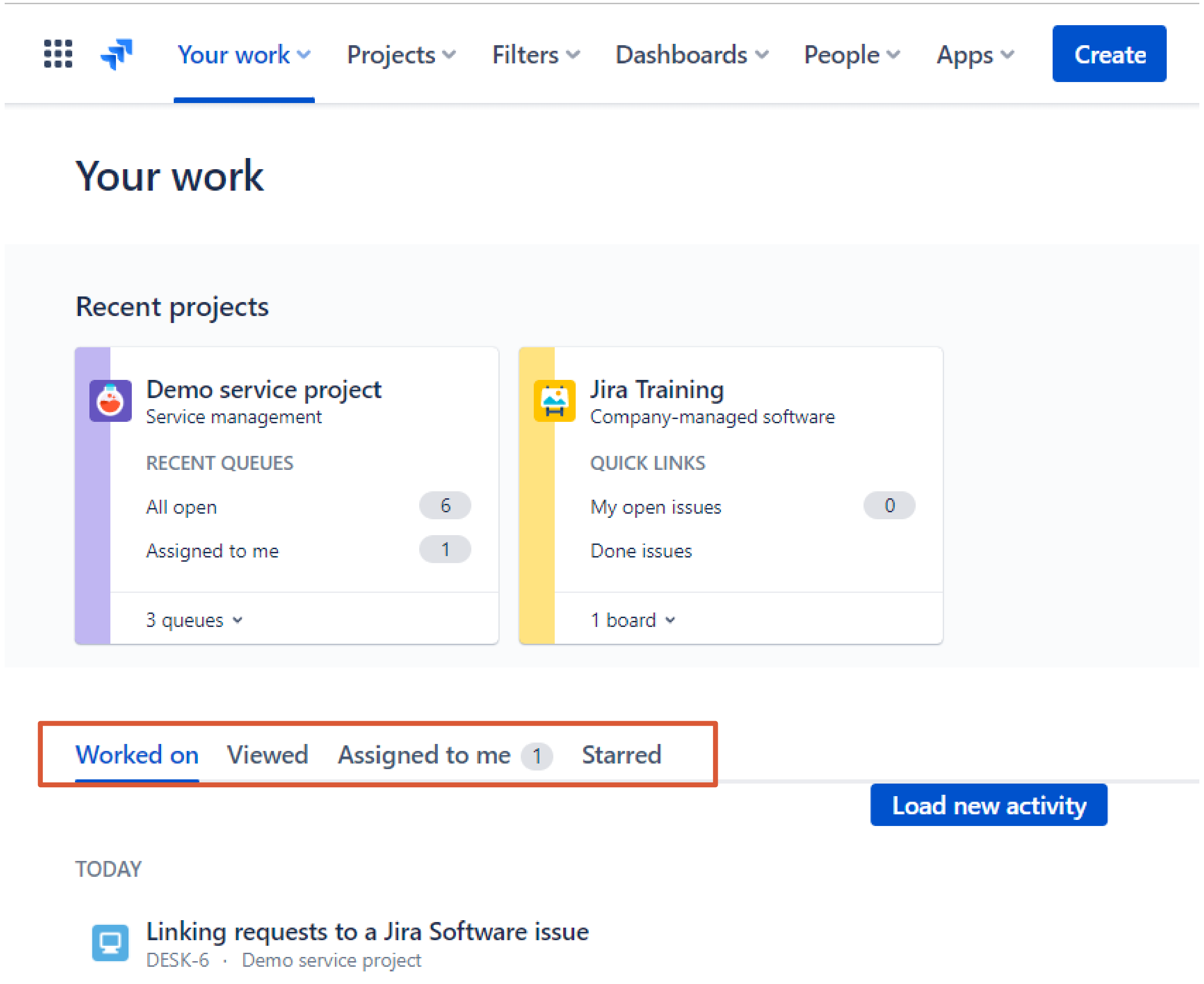
Navigation



Navigating the main interface

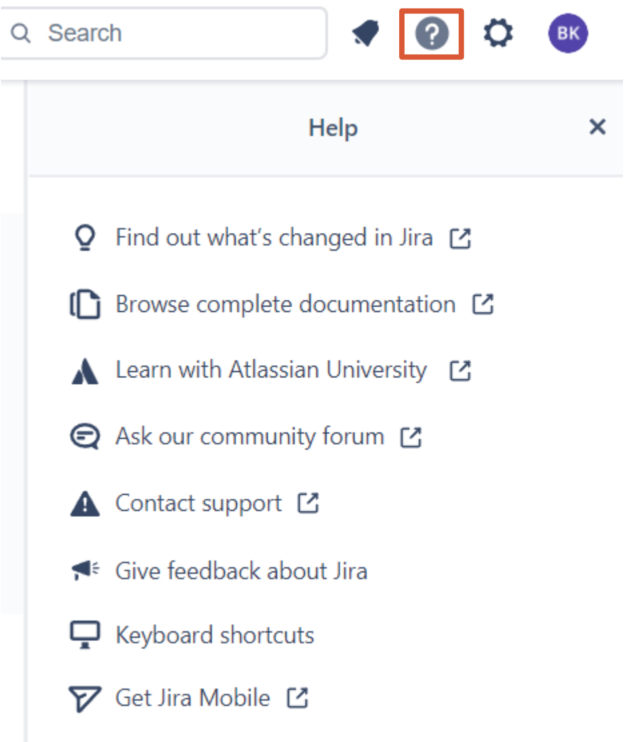
You will notice the top tool bar contains all the drop downs you will need in your work. These will be discussed in future sections.

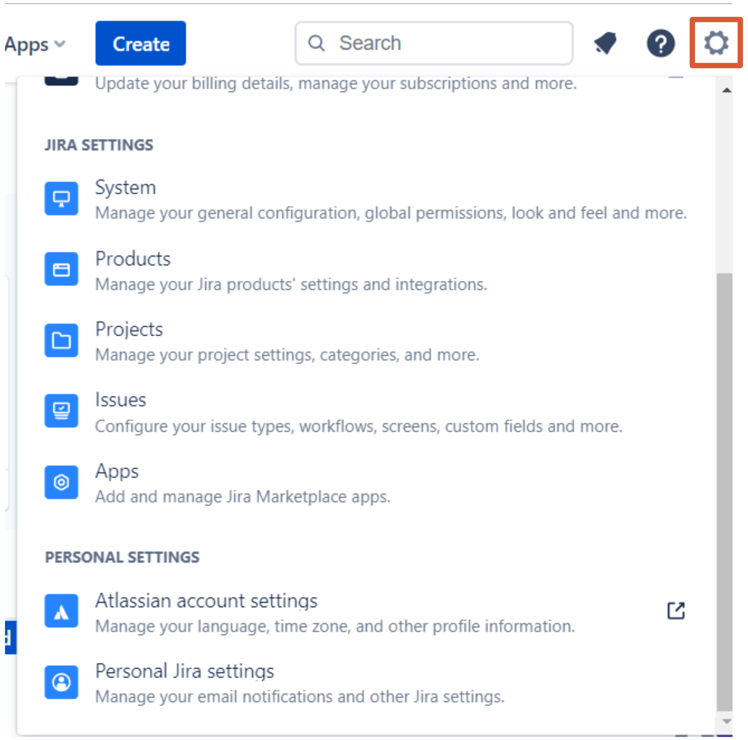
Your Work



Under the **Your Work** page, you will find your recent projects, activity, starred locations and what is assigned to you.

Help and Settings

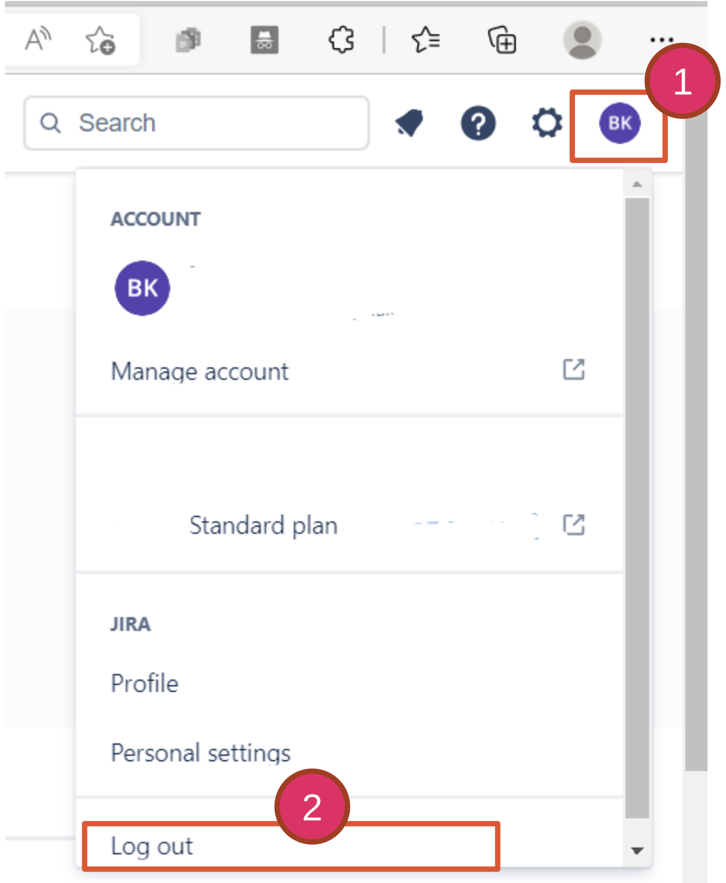


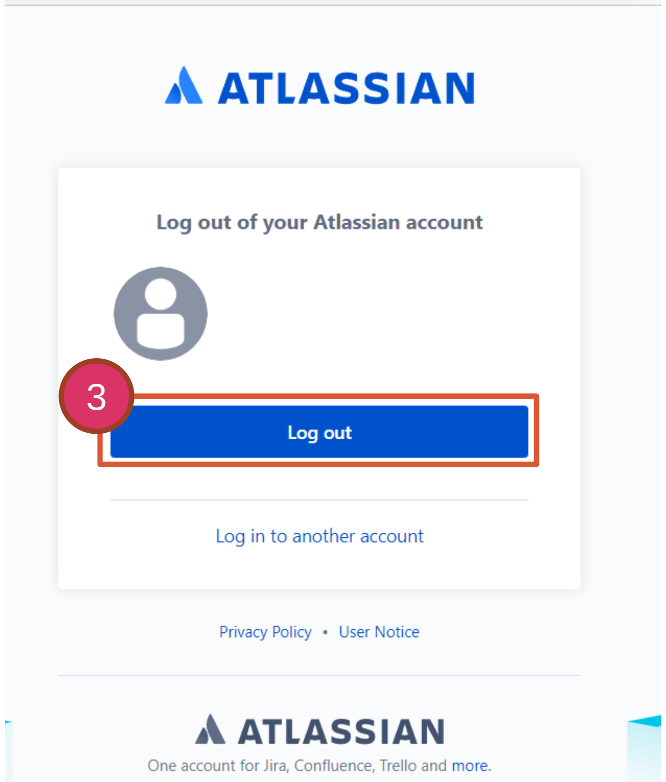


- The **Help** Icon will open a location for common help tools.
- The **Settings** button will allow you to change your personal and project settings.

Signing Out of your Account

1. Select 'Your profile' in the global sidebar
2. Choose **Logo**
3. A new box will open. Select **Logout** again.





Create a Project

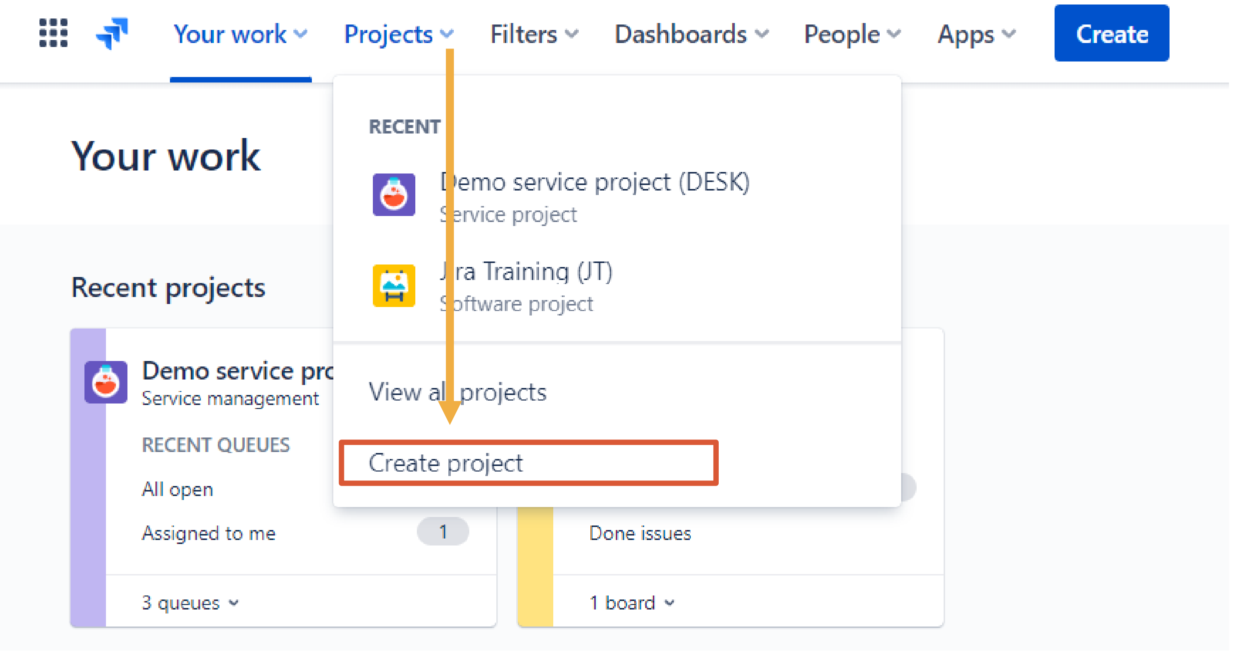
This is Sam. Sam is a Project Manager that just started using Jira. He needs to know how to create a project.

Follow along and you will learn how you can quickly create a new project by choosing a project template such as Kanban, Scrum or Bug Tracking.

Creating a Project

- Select **Project** from the top bar
- Select **Create project**

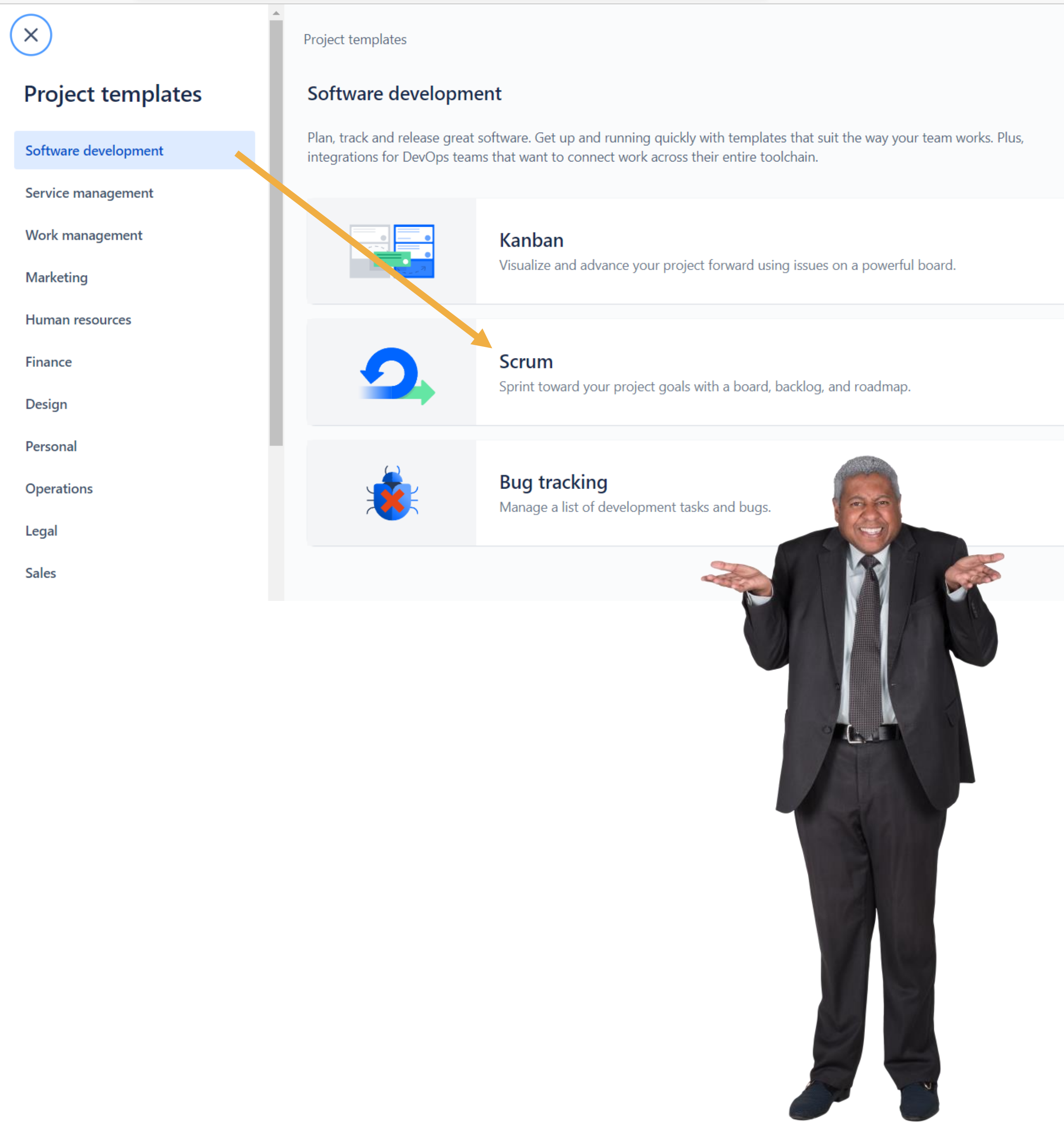
Sam's project needs to be entered into Jira. He has his information ready to go. Let's start by opening Jira. On the top you will see the top header with ACTIONS and Dropdowns.



Creating a Project

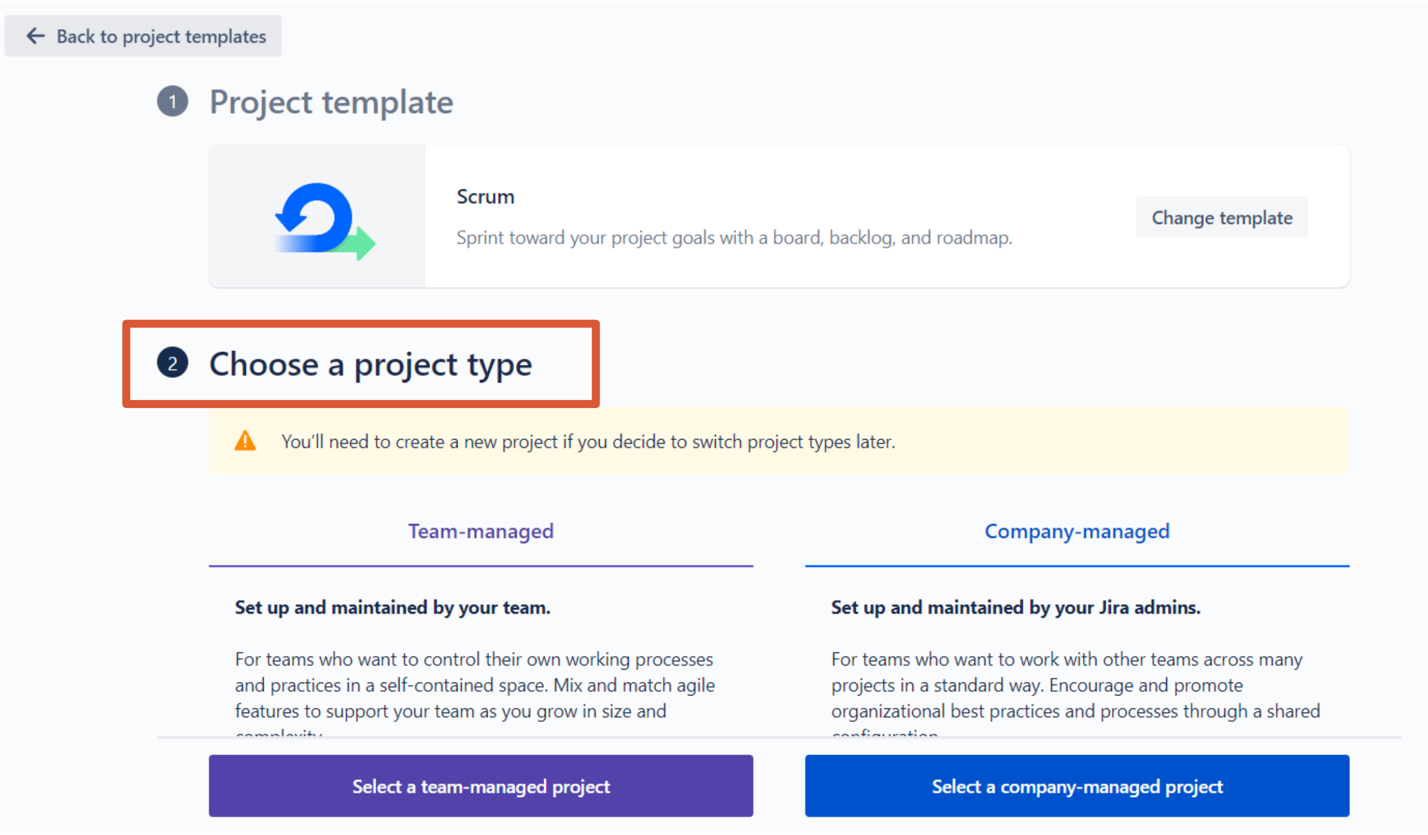
- Select a template
- Choose **Scrum**

Use the left menu to browse templates. Since this is for Sam’s PM Project, he choses the SCRUM template.



Creating a Project

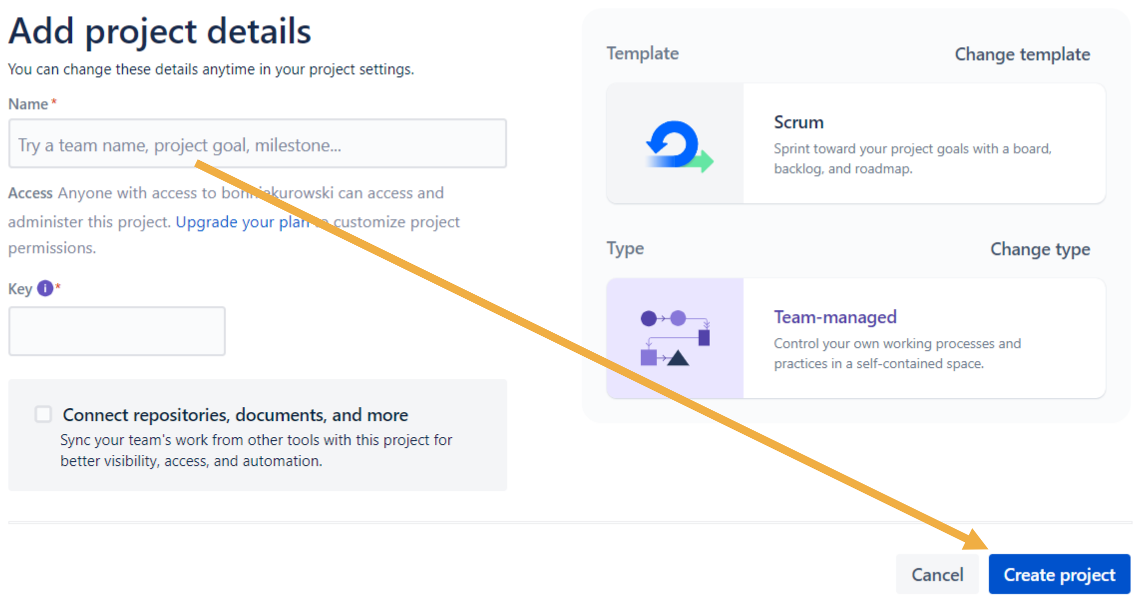
- Select project **type**



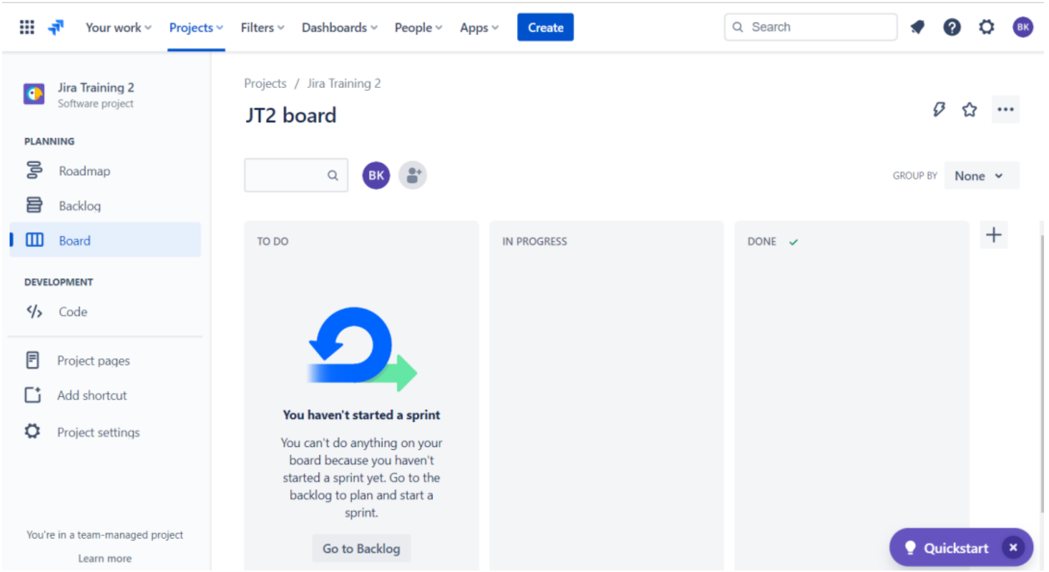
Creating a Project

- Add Project Details, including **Project Name**. Note: You can still change the template at this time on the right if needed.
- Click **Create Project**.

Adding Project Details



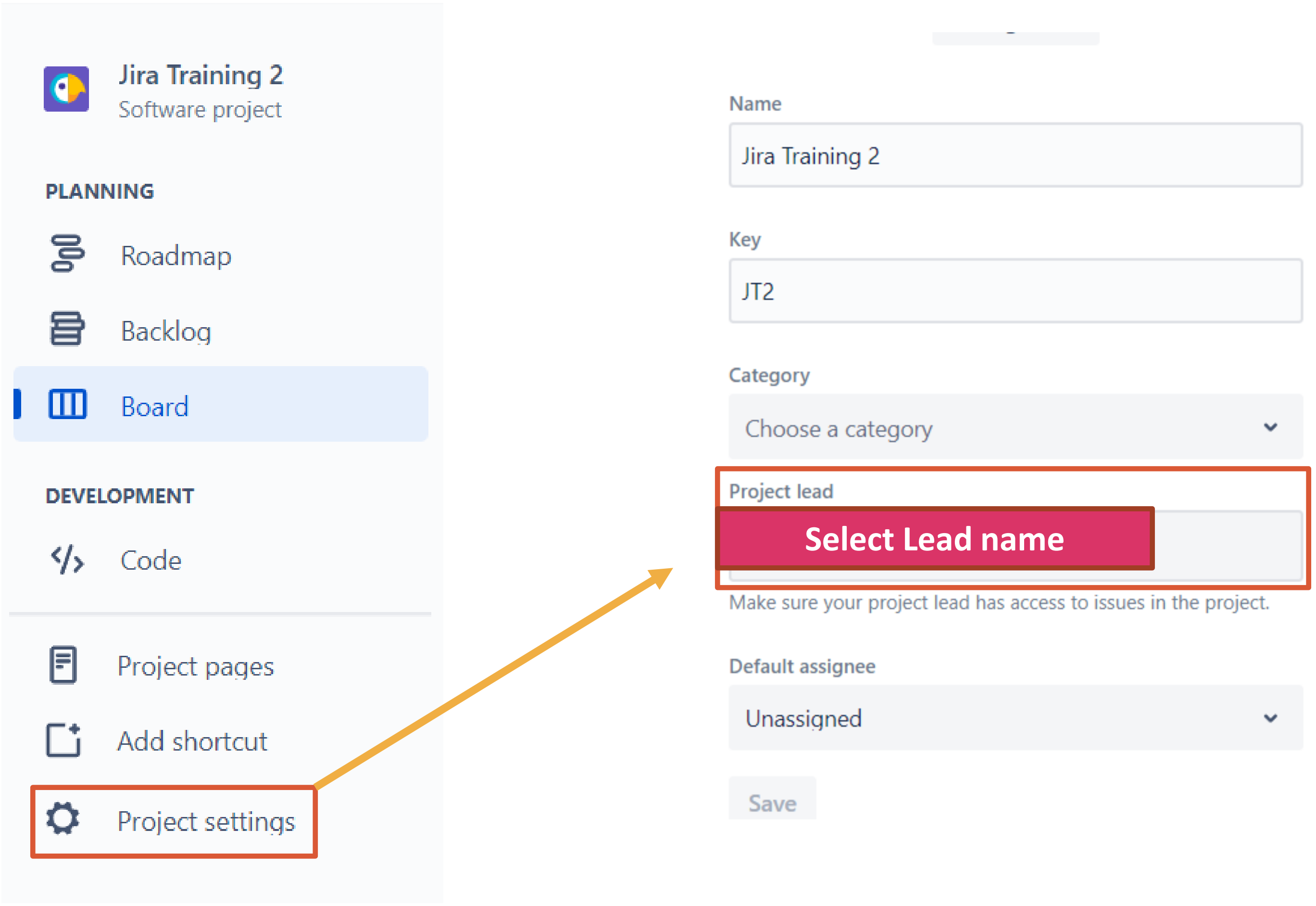
Creating a Project



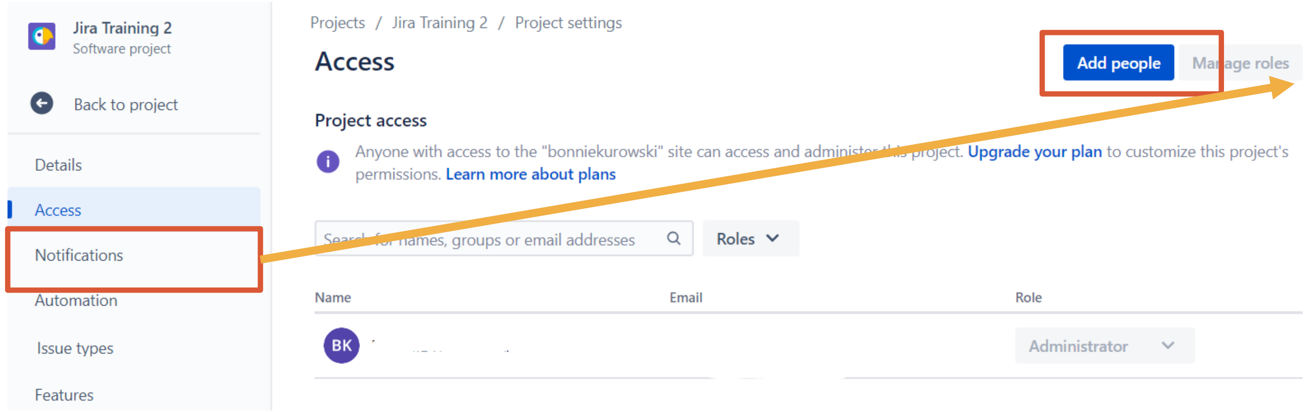
The Board will appear on the screen. You can se the left toolbar will be your guide.

Assigning a Project Administrator (Project Lead)

- Select **Project Settings** in the bottom left corner
- Another screen will pop up. Add your project lead here.



Adding Access

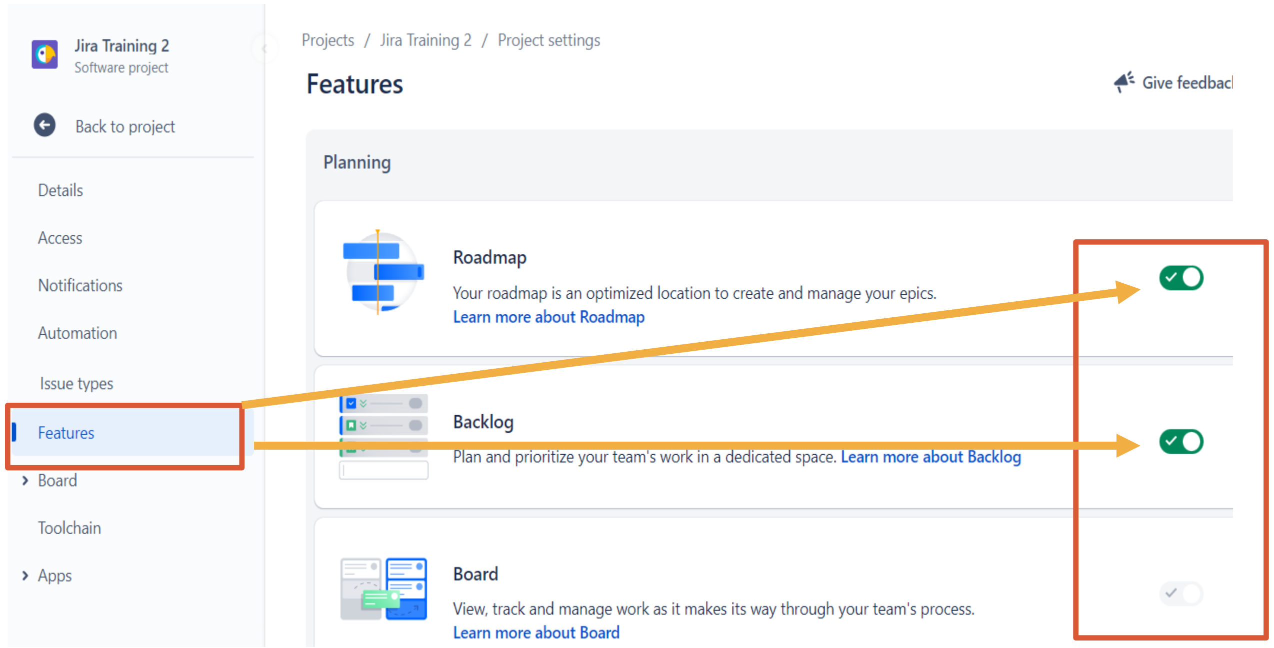


- Choose Access
- Add people

Choosing Project Features

- Click **Features**
- Toggle on/off feature options

The Project is now open!

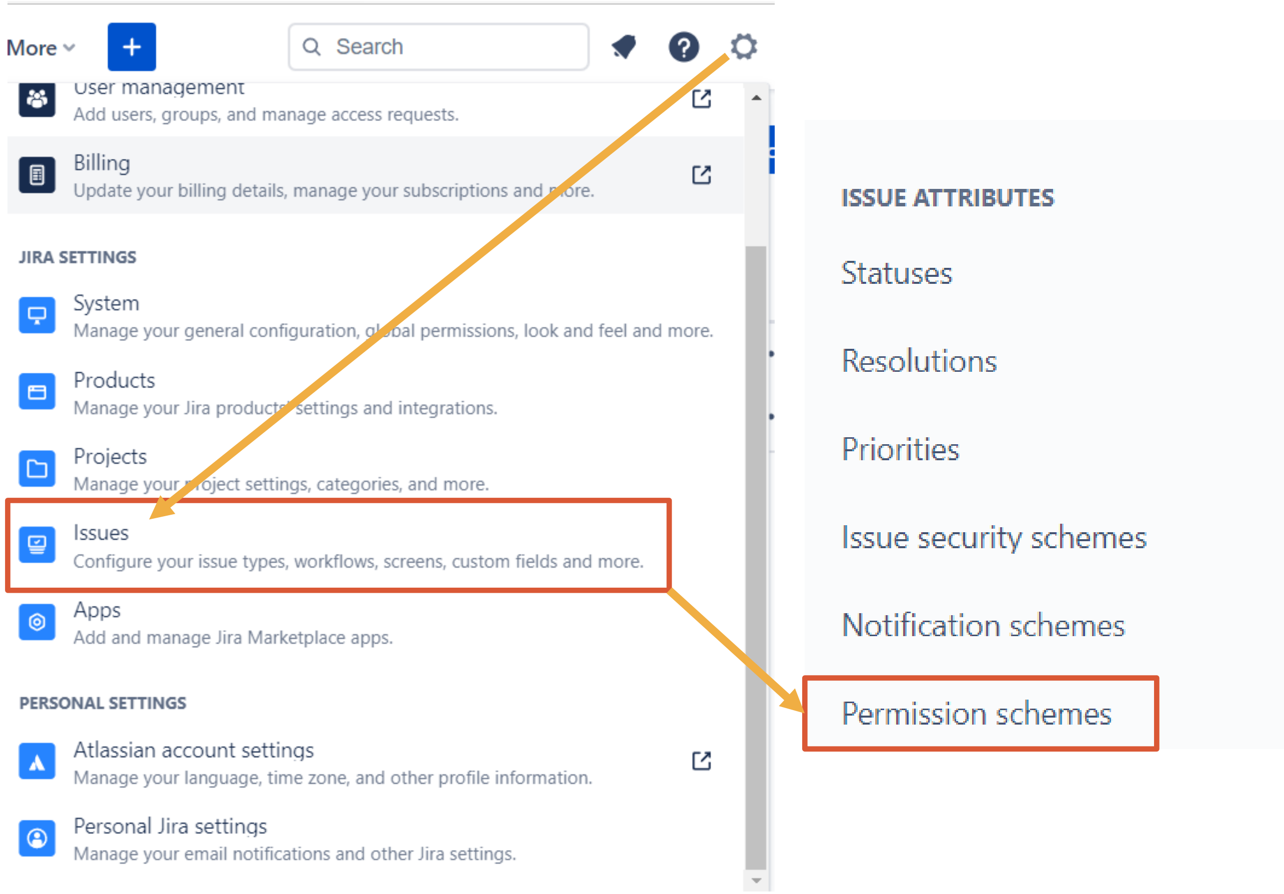


Add users, groups, roles and permissions

In order to help your project to run more smoothly you can manage user roles in the permission schemes. In this section, you will learn how to access and grant roles to groups or users in Jira.

Accessing Permission Schemes

Let's help Sam add permissions.



- Select Jira settings and click on Issues
- Select Permission Schemes to open the Permission Schemes page

Editing

Issues

Search Jira admin

Permission schemes

Add permission scheme

Permission schemes save you time in project setup and admin. Each scheme is a set of permissions that you can apply to multiple projects. Learn more

Below are the schemes currently configured for this site. For permissions that apply to all projects, see global permissions.

Learn more about project permission schemes

Name	Projects	Actions		
Default Permission Scheme This is the default Permission Scheme. Any new projects that are created will be assigned this scheme.		Permissions	Copy	Edit
Jira Service Management Permission Scheme for Project DESK This Jira Service Management Permission Scheme was generated for Project DESK	• Demo service project	Permissions Delete	Copy	Edit
JT software permission scheme The permission scheme for Jira Software Free. In Free, any registered user can access and administer this project.	• Jira Training	Permissions Delete	Copy	Edit

Editing Permission schemes

- Locate the Permission scheme that need to be updated
- Select **Permissions** from the Actions columns to view the scheme
- Select **Edit** link for permission to add to

User Permissions

Issue Permissions

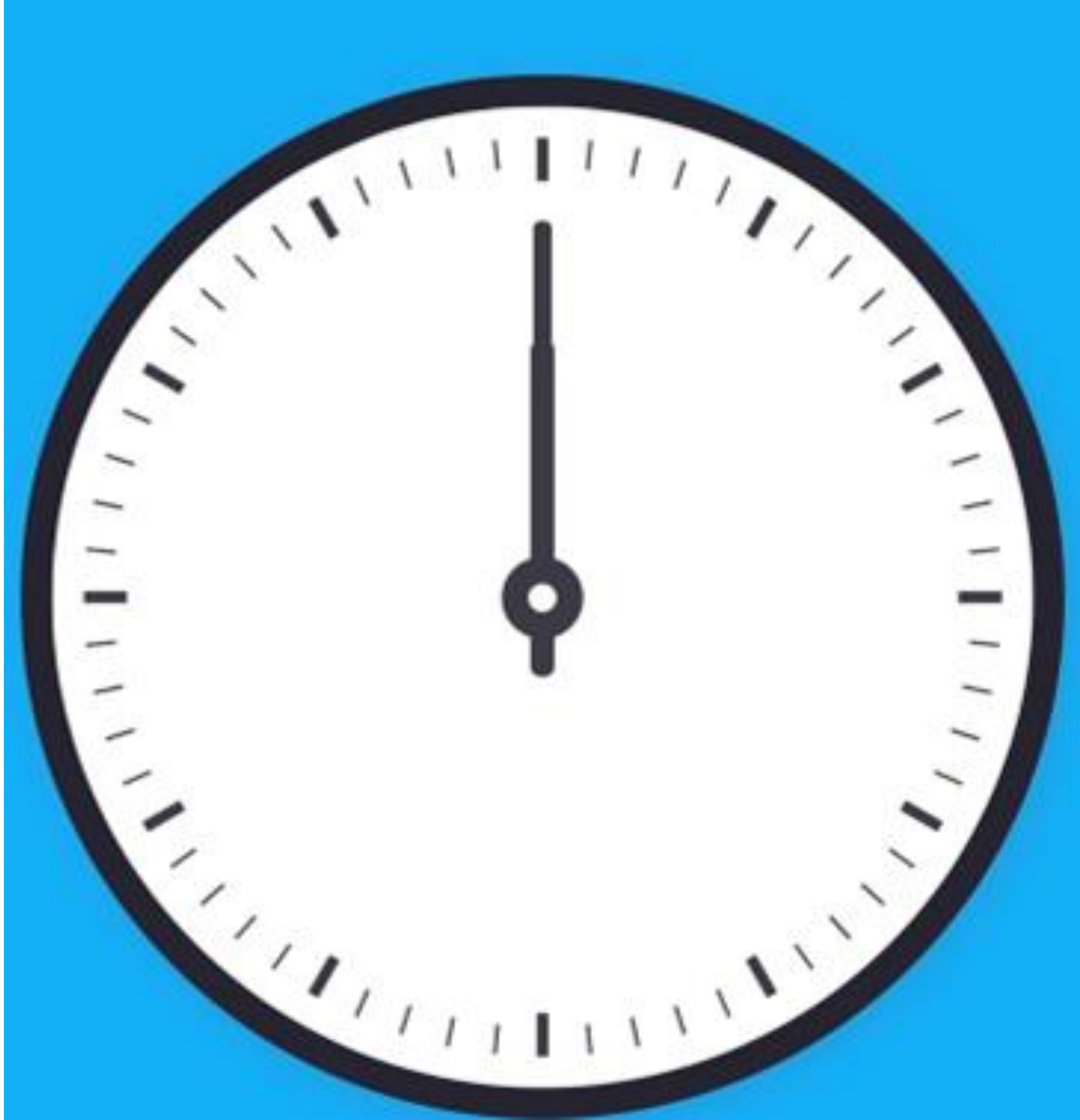
Permission	Grant To		
Assignable User Users with this permission may be assigned to issues.	**Project Role** • atlassian-addons-project-access **Any logged in user**	Update	Remove
Assign Issues Ability to assign issues to other people.	**Project Role** • atlassian-addons-project-access **Any logged in user**	Update	Remove
Close Issues Ability to close issues. Often useful where your developers resolve issues, and a QA department closes them.	**Project Role** • atlassian-addons-project-access **Any logged in user**	Update	Remove

Granting user permissions

- When the Permission dialog box appears select **update**
- Add users

Questions?

Take a 10-minute Break!



Creating and Associating Permission Schemes

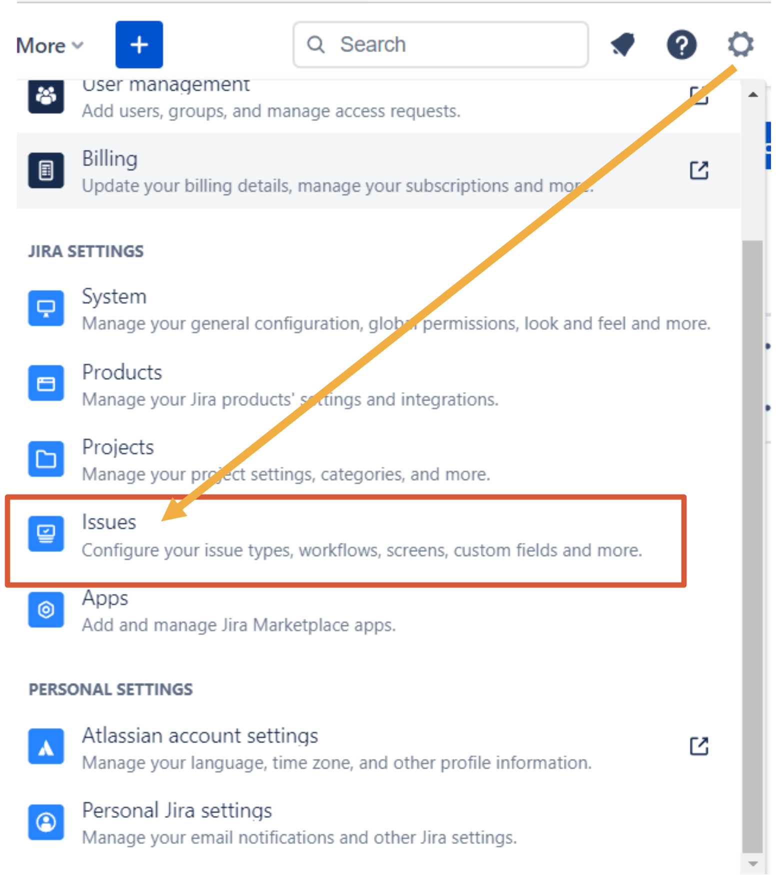
Jira gives you the possibility to create new permission schemes that can be easily added to your existing projects.

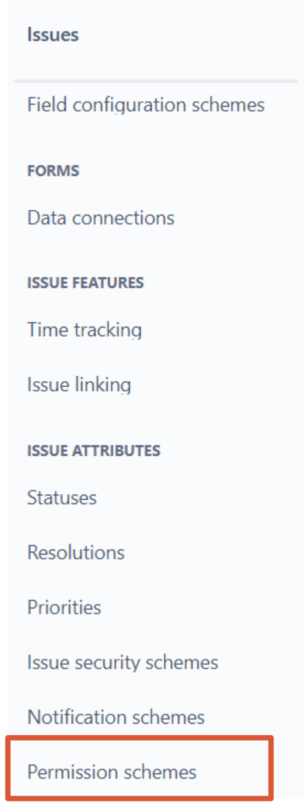
This gives you the possibility to have specific permission schemes for each of your projects allowing you to better manage your user permissions.

Assist Sam to create a new permission scheme.

Accessing Permission Schemes

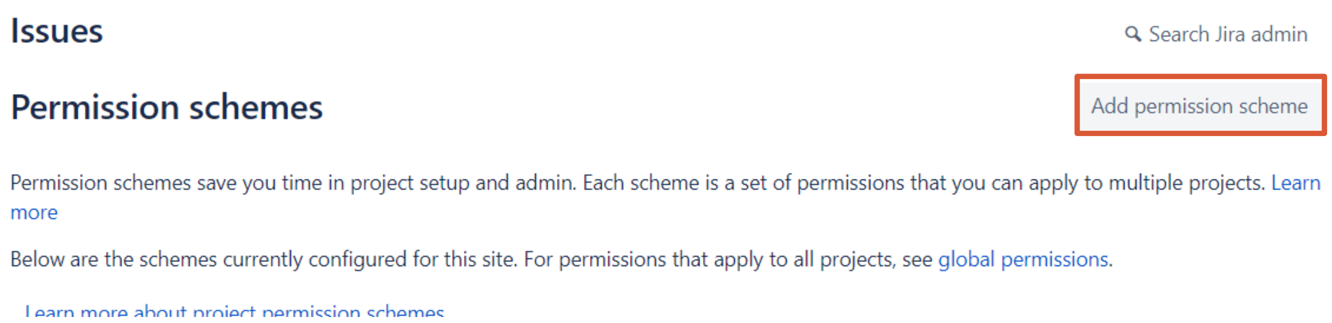
- Select Jira settings and click on Issues
- Select Permission Schemes to open the Permission Schemes page

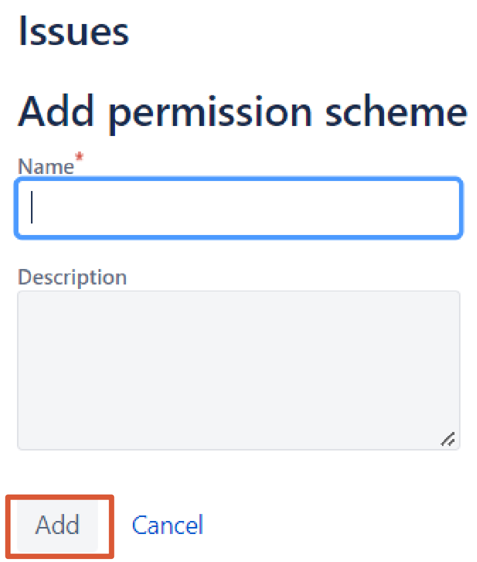




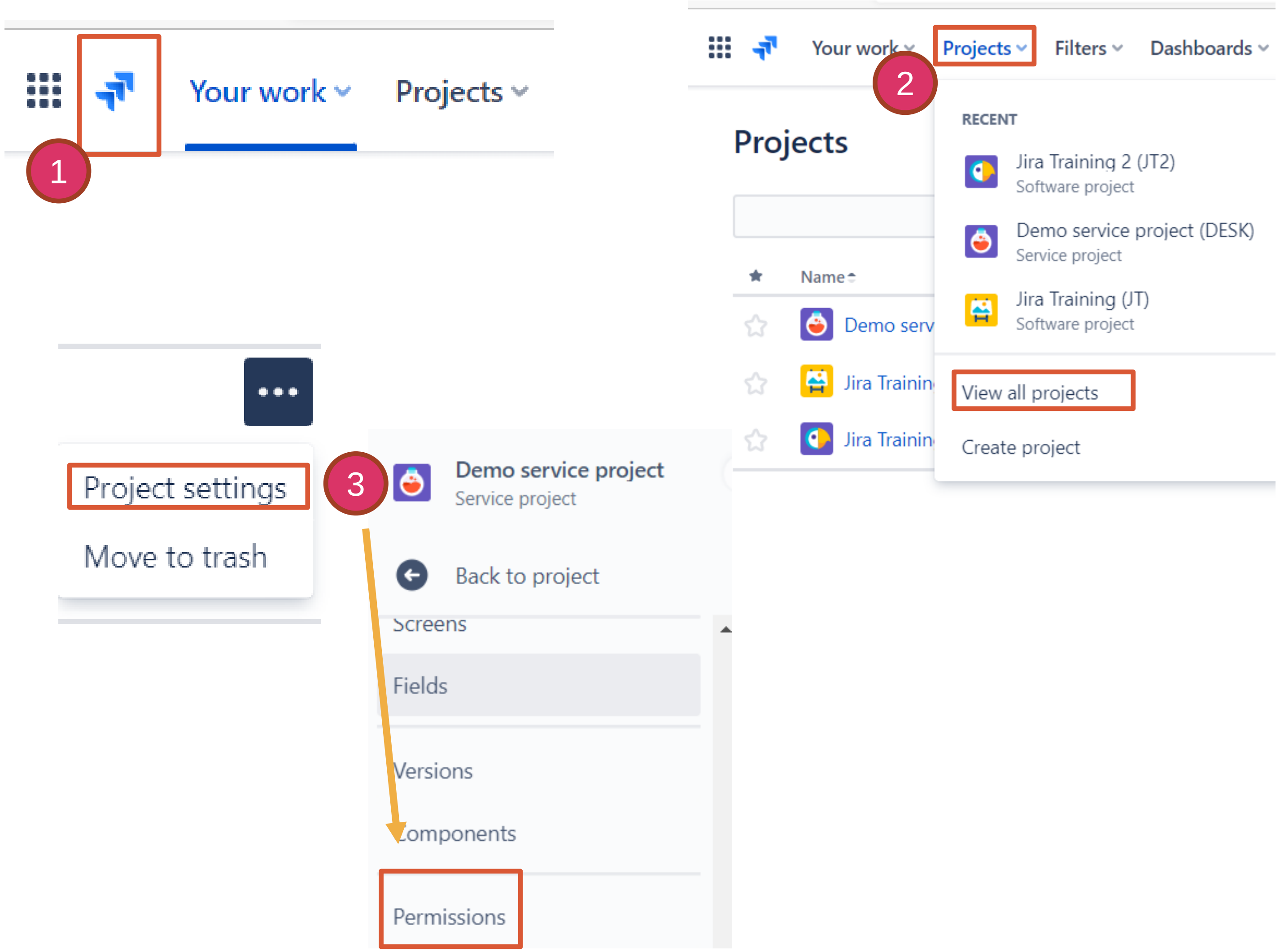
Adding a Permission Scheme

- Click on the **Add Permission Scheme** link
- Enter the name (description optional) and click **Add**





Adding permission schemes to projects



1. Select the Jira **icon** to go to projects page
2. Search **Projects** and launch the Project page
3. Select **settings**, scroll down and select **Permissions**

Adding Permission Schemes to Projects

- Click **Actions** and choose **Use Different Scheme**
- On the Associate Permission Scheme to Project page select Permission Scheme

If I have these permissions can I add public access?

Setting up public access

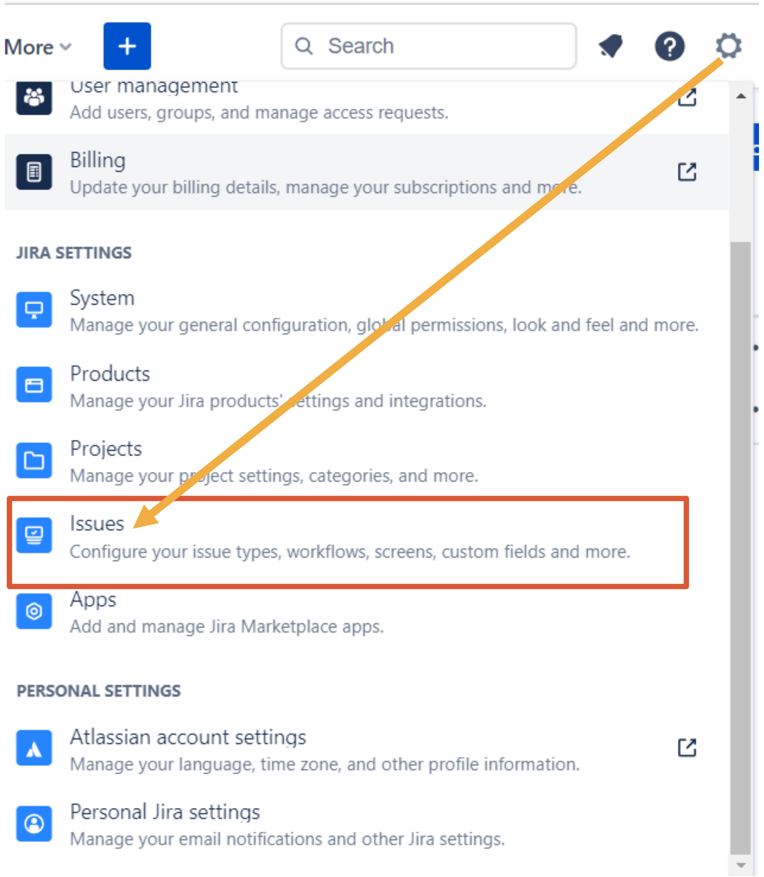
Yes, public access is available. If you would like users to be able to access your project from outside of your company, clients for example, you can grant public project permissions.

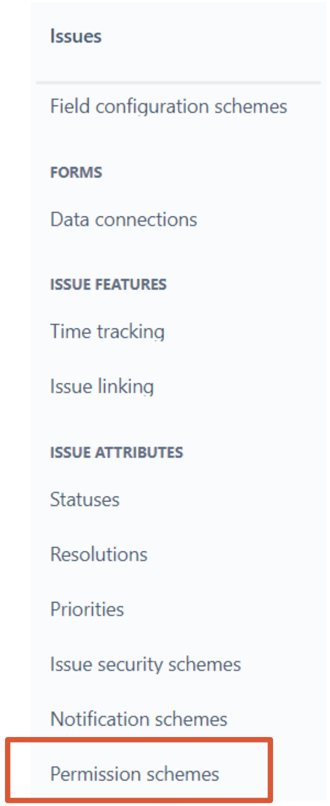
Assist Sam with this request.

Accessing Permission Schemes

- Select Jira **settings** and click on **Issues**
- Select **Permission Schemes** to open the Permission Schemes page

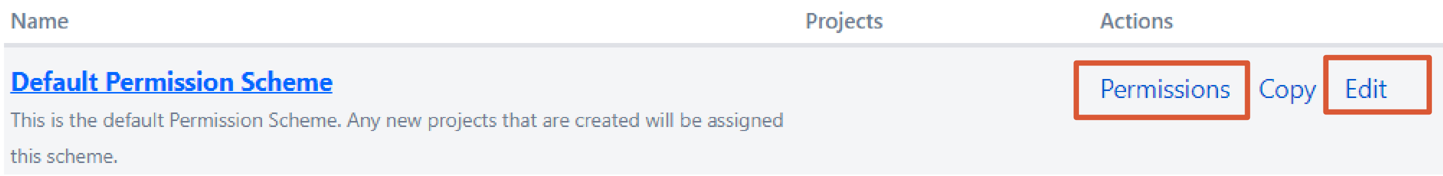
If you would like users to be able to access your project from outside of your company, clients for example, you can grant public project permissions





Editing Permission Schemes

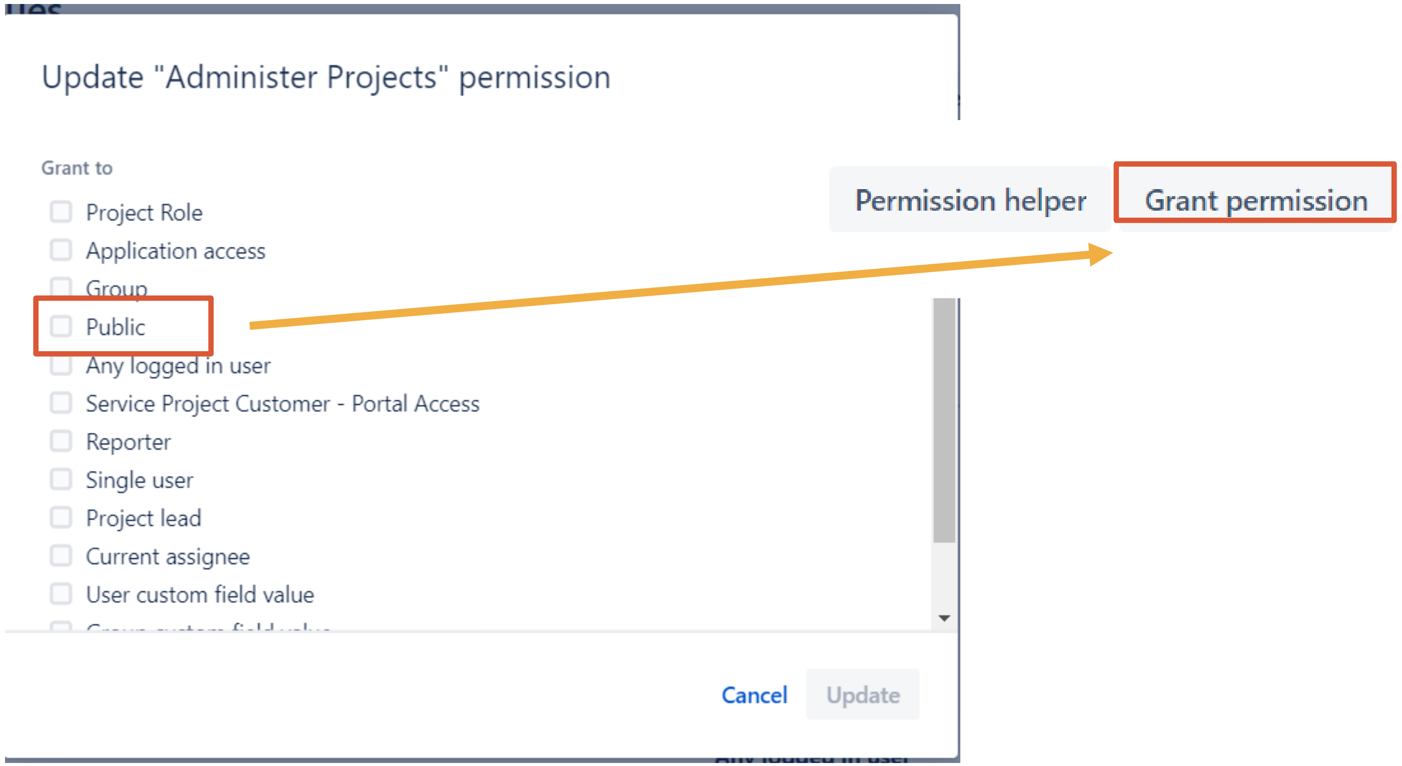
- Locate the Permission scheme that need to be updated (Project Permissions vs Issue Permissions)
- Select **Permissions** from the Actions columns to view the scheme or **edit** to make changes.



Adding Public Groups to Permission Schemes

- Add group to the browse Project Permission in Permission Scheme for Project
- Select drop down menu and choose "**Public**"
- Warning for making permission public – **Grant**

You added public groups!



Associating workflow schemes to projects

Do you have any tips on how I can better manage my projects in Jira?

Tip: Jira enables you to better manage your projects by creating workflow schemes.

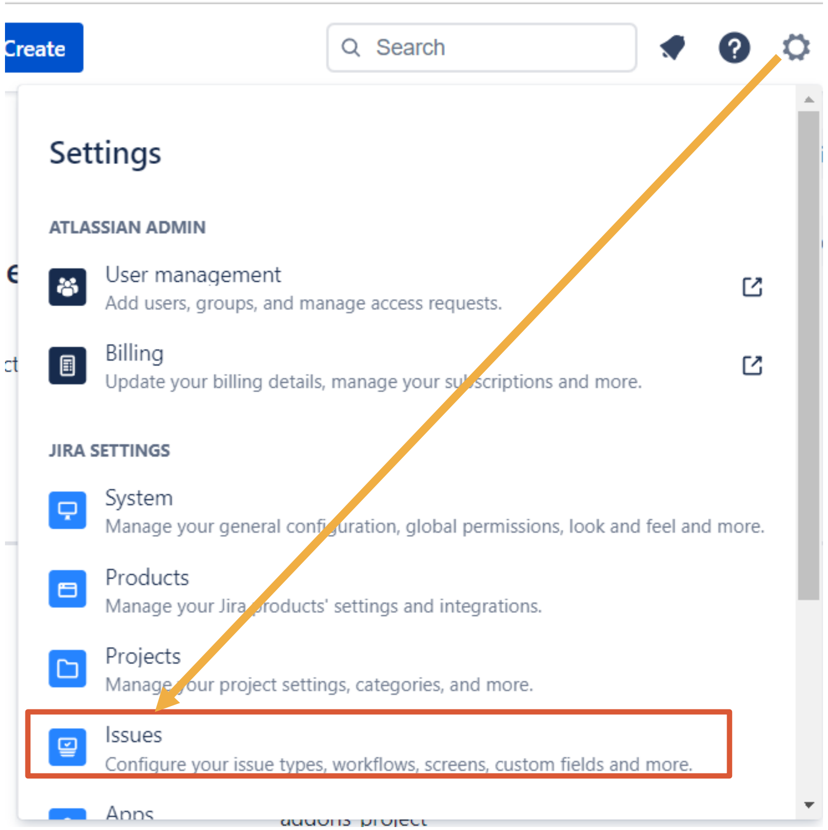
These workflow schemes can be easily associated with your projects in Jira.

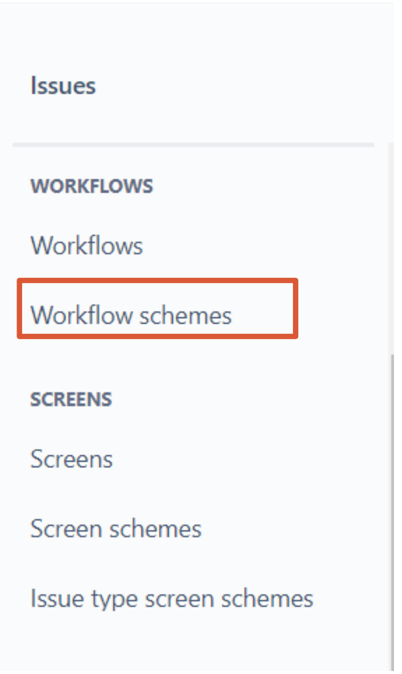
Let’s help Sam.

Accessing Workflows

In order to associate workflows with specific issue types, you can create workflow schemes.

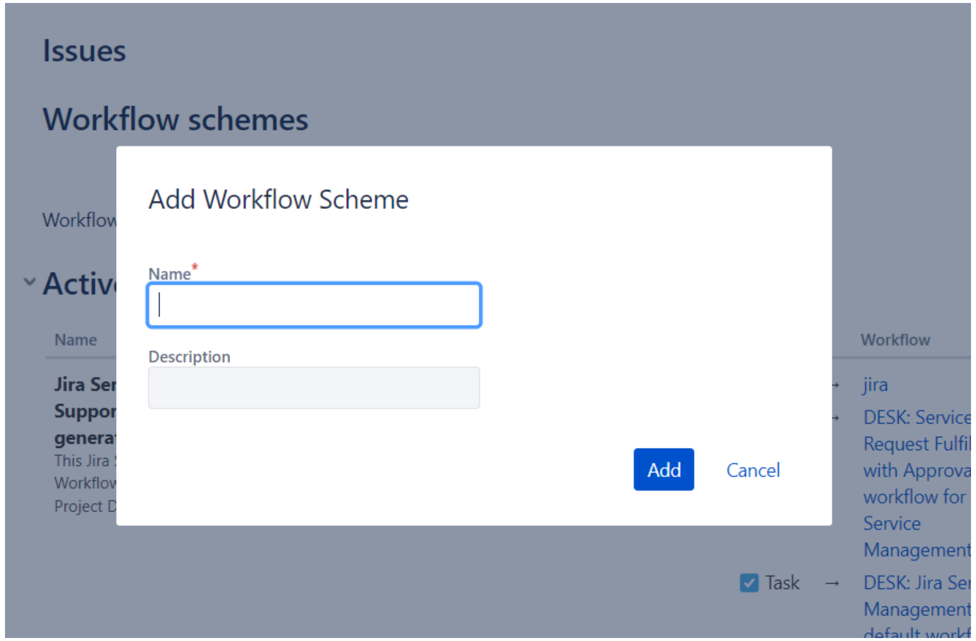
- Select Jira Settings - Select **Issues**
- Locate and select **Workflow Schemes**





Adding a Workflow Scheme

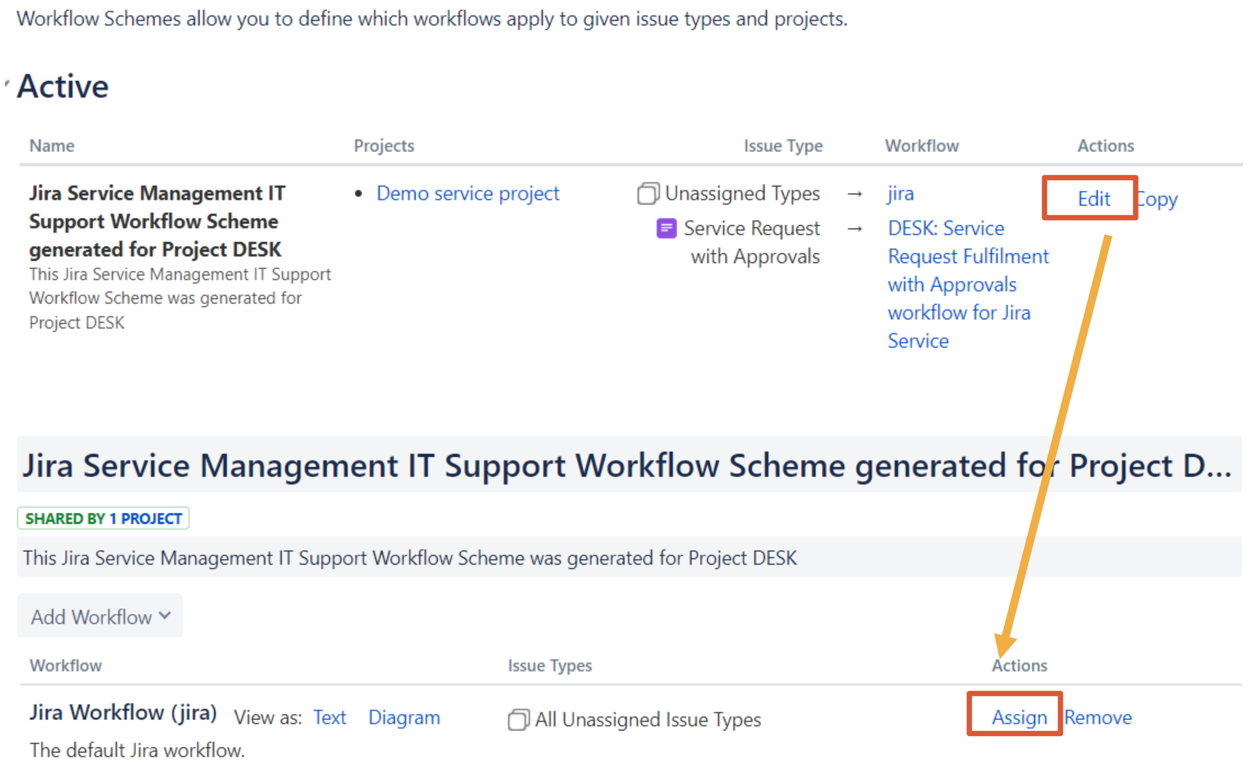
- Select **Add Workflow Scheme** in the top right corner
- Add name, description (optional) - Select **Add**



Adding Issues Types to Workflow Schemes

- Return to Workflow schemes
- From the Workflow Schemes Dashboard select **Edit** and **assign** Issue Type by checking the desired Issue Type
- Click **Finish**

You added a workflow Scheme.



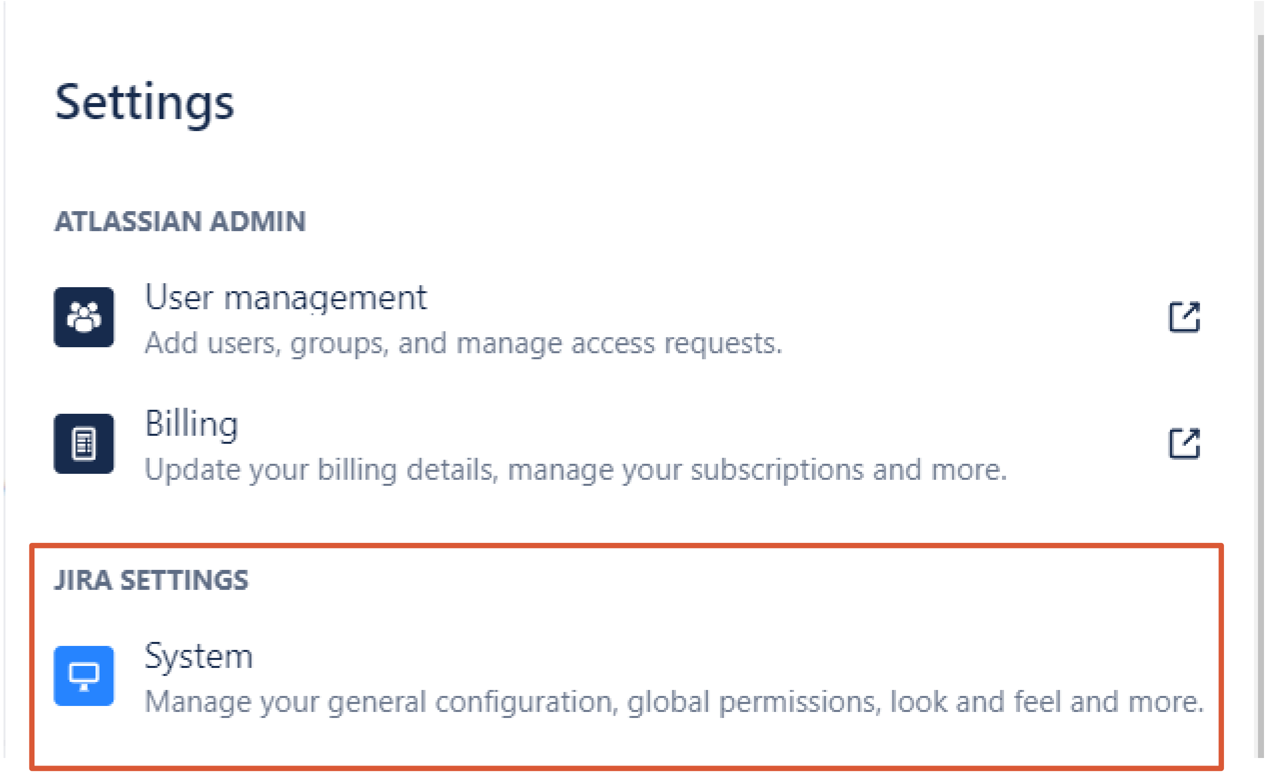
Configuring Attachments

Attachments can be added to issues in projects. The attachment settings can be easily modified to meet your needs. Let’s look at how to access and update attachment settings for Jira.

Let’s assist Sam.

Accessing the Attachment Settings Menu

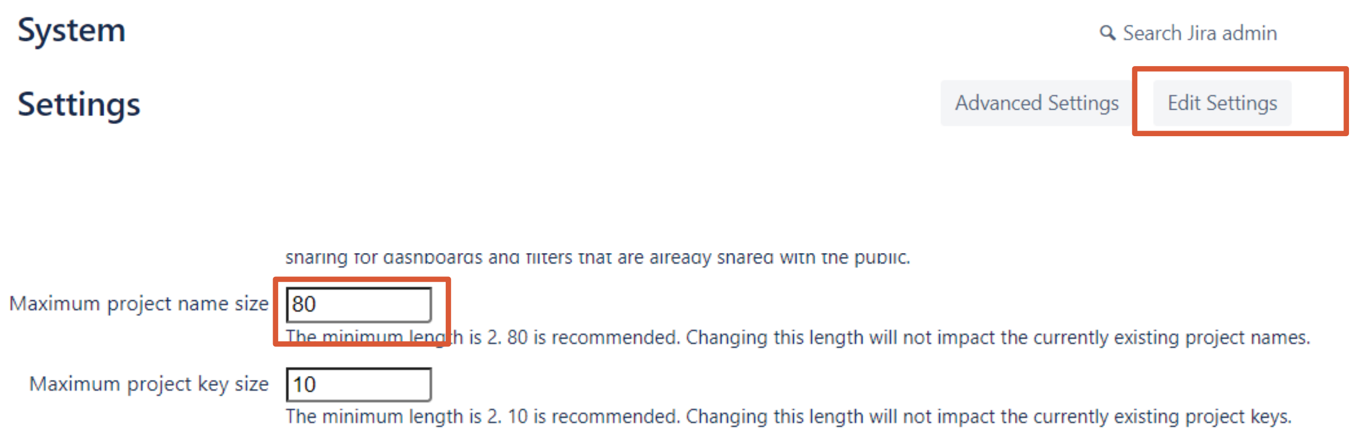
Select Jira **Setting** followed by System



Editing Attachment Settings

- From the System page select Advanced and click on Attachments
- Click **Edit** Settings to launch the Edit Attachment Setting dialog box
- In the Attachment Size option specify the **maximum desired** attachment size

Now attach!

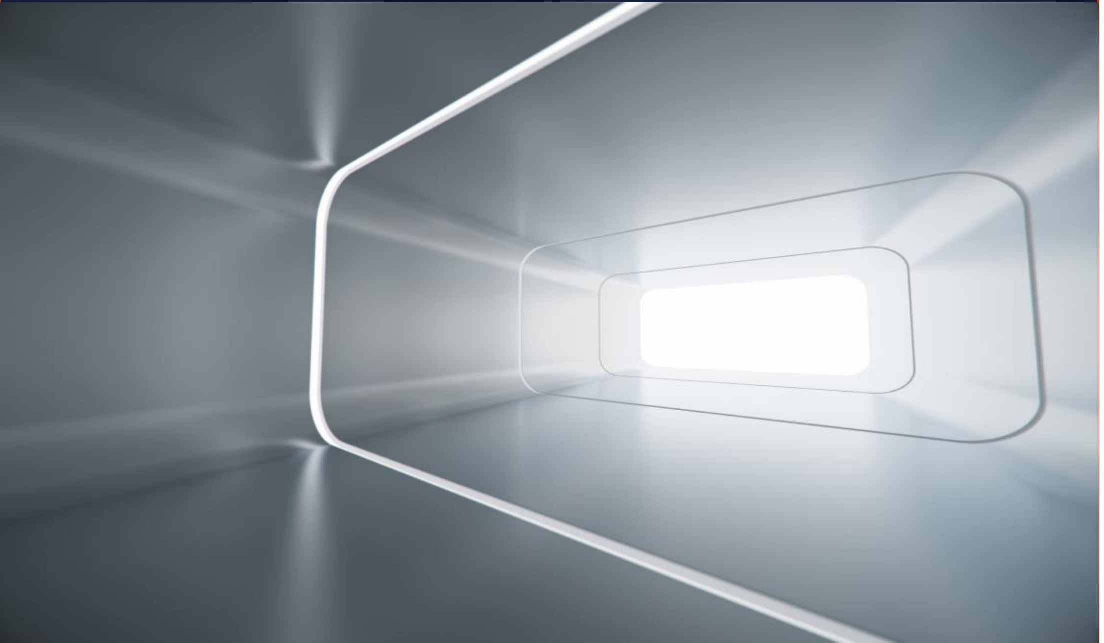


Updating

Click Update

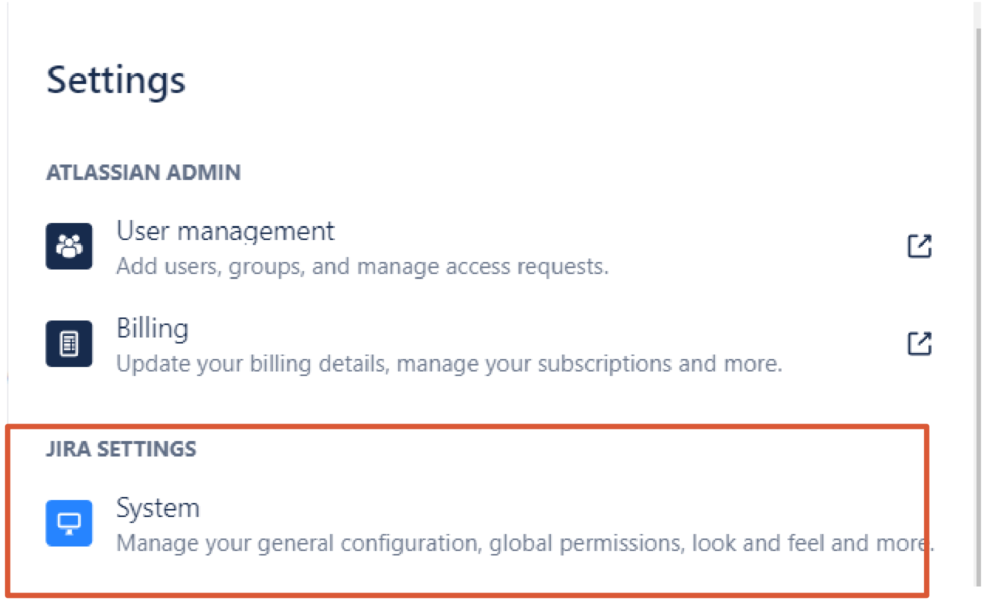
Configure Jira Regional Settings

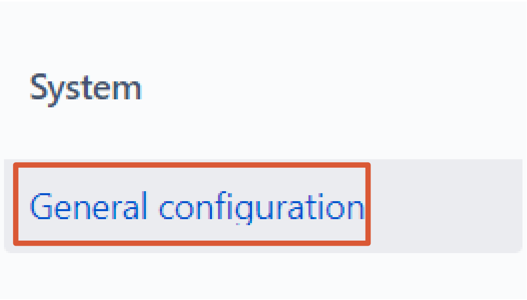
Let’s show Sam how to access and update his internationalization settings in Jira from the general configuration’s menu.



What if I would like to change the default language and regional settings for Jira?

Accessing the System Settings

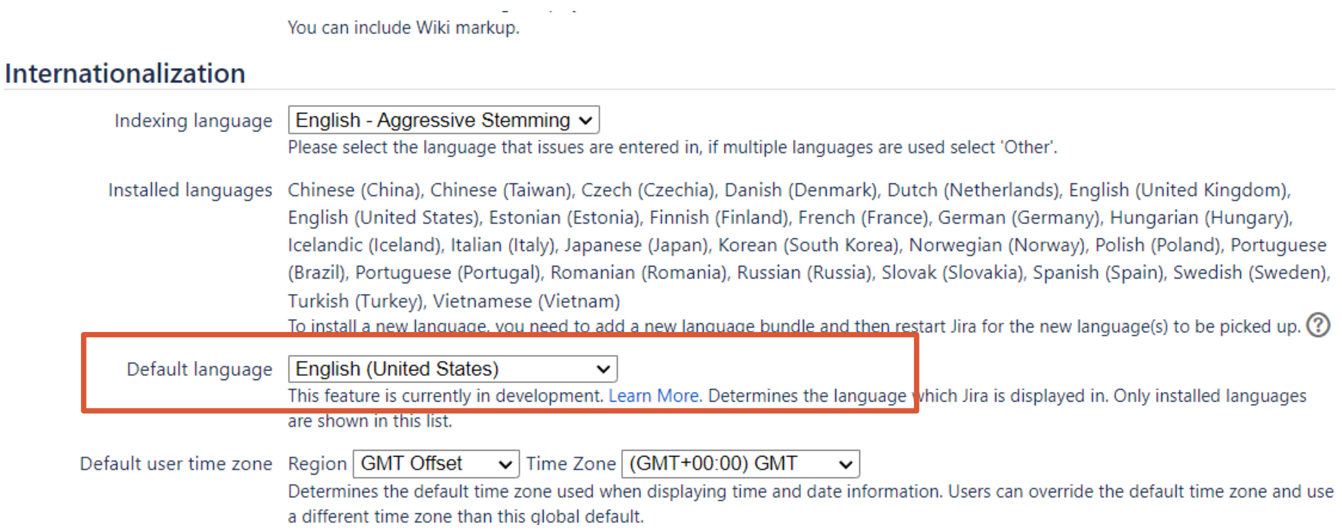




- Select Jira **Setting**
- Select **System**
- Click **General Configuration**

Customizing Your Internationalization Settings

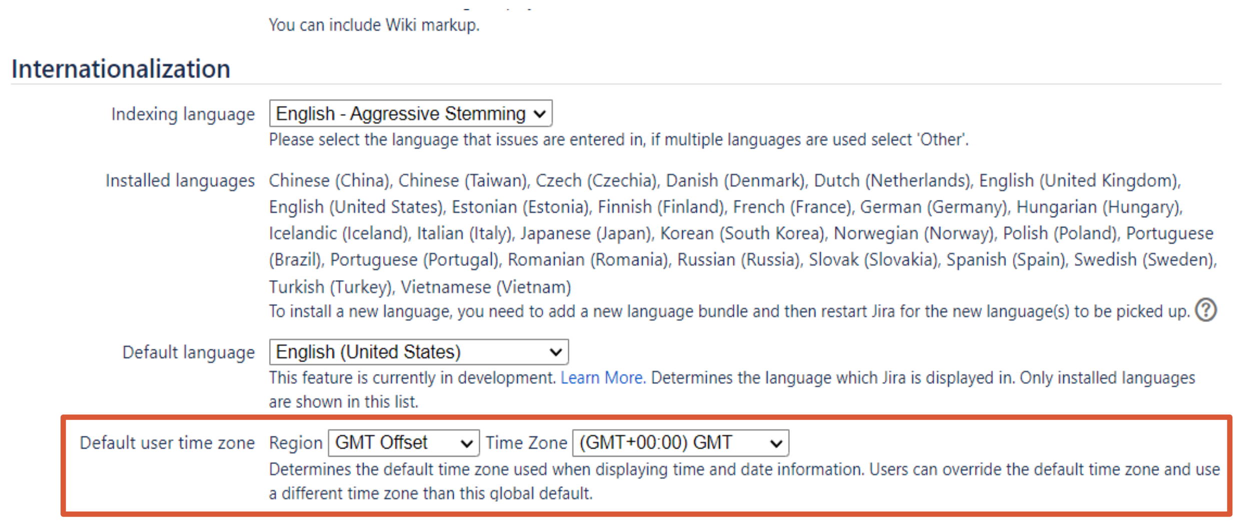
- Internationalization
- Modify the language preferences



Adjusting Regional Settings

- Region and time zone settings
- Select update at the bottom of the page

You have now changed the regional settings.



Questions?

In Summary:

You are now able to:

1. **Sign in** and **Navigate** Jira
2. Create a Project
3. Add **users, groups, roles** and **permissions**
4. Customize **workflows** and schemas
5. Configuring **attachments** and **regional settings**

JIRA

Creating & Setting Up Projects

Overview

Now it's your turn to learn while I watch!

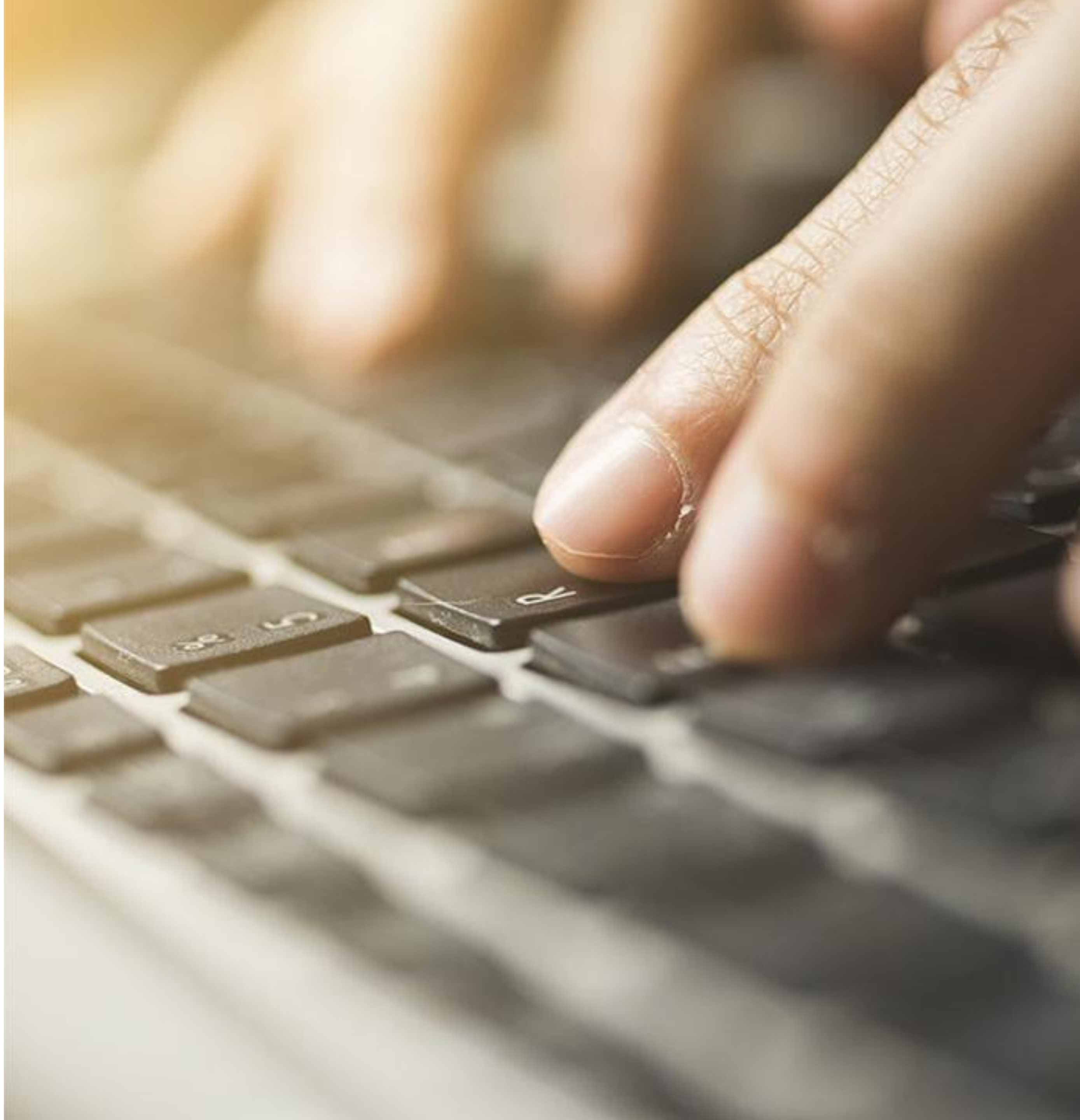
Jira projects contain boards such as SCRUM and Kanban. These boards can be customized and configured to met your projects needs. Once you've created boards you can start managing your projects by adding issues and subtasks.

To get the most out of your boards, you can easily configure the filters, columns and overall display.

Objectives

In this course, you will learn how to:

- Create **SCRUM** and **Kanban Boards**
- Create and manage **issues** and **subtasks**
- Create **stories**
- **Manage board configurations** and **board filters**

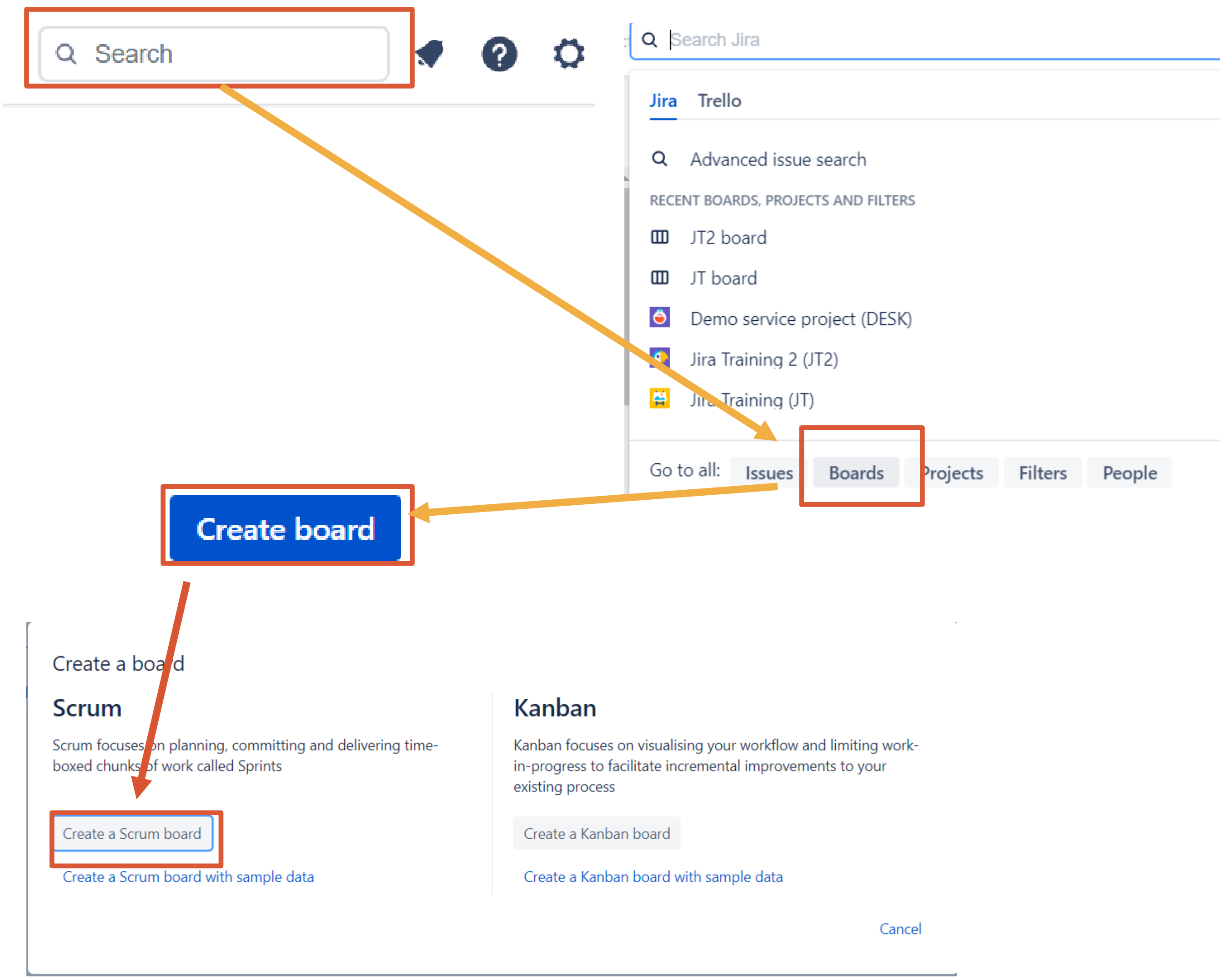


Creating a SCRUM Board

Jira enables you to quickly create scrum boards toadd the new or existing projects. Scrum boards are commonly used in software development to manage complex projects by creating a collaborative environment.

In this section, you will learn how to quickly add, edit and use scrum boards in Jira.

SCRUM Board



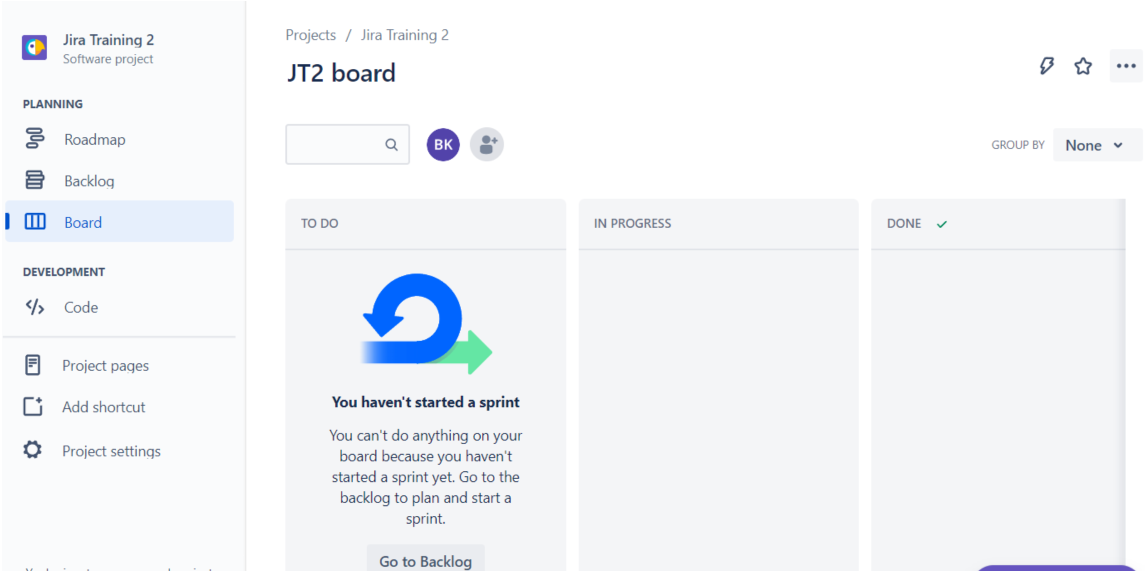
Creating a scrum board

- Click **Search** in the Global sidebar - Select View all boards
- Click **Create Board** from the top-right side of the page
- Select **Create** board in the top right corner
- Select **SCRUM** Board

Interface

Exploring the board interface

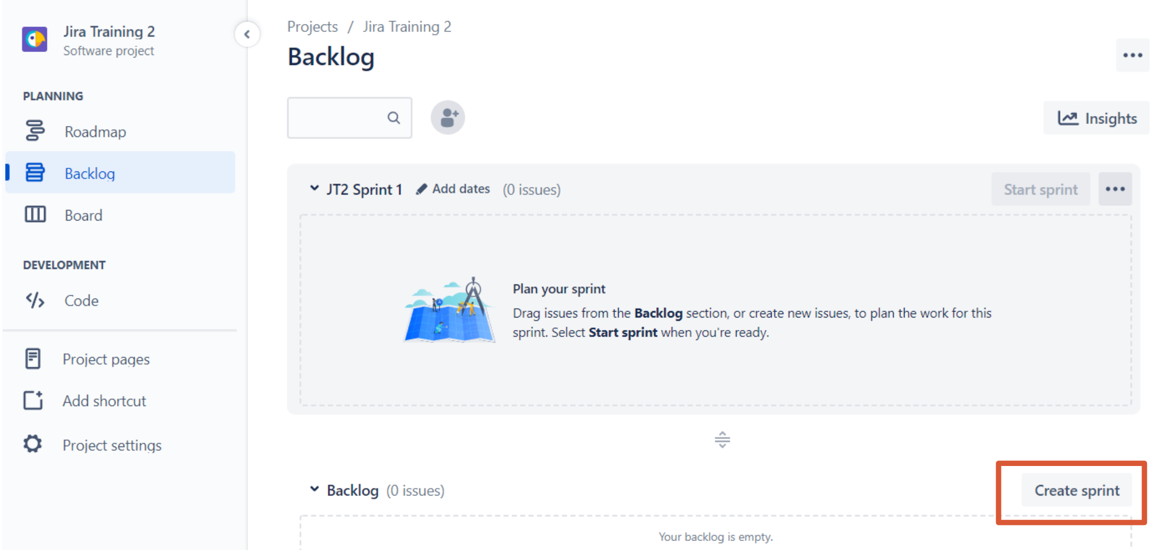
- Explore the Sprint presents in the board
- Plan sprints



Interface

Exploring the board interface

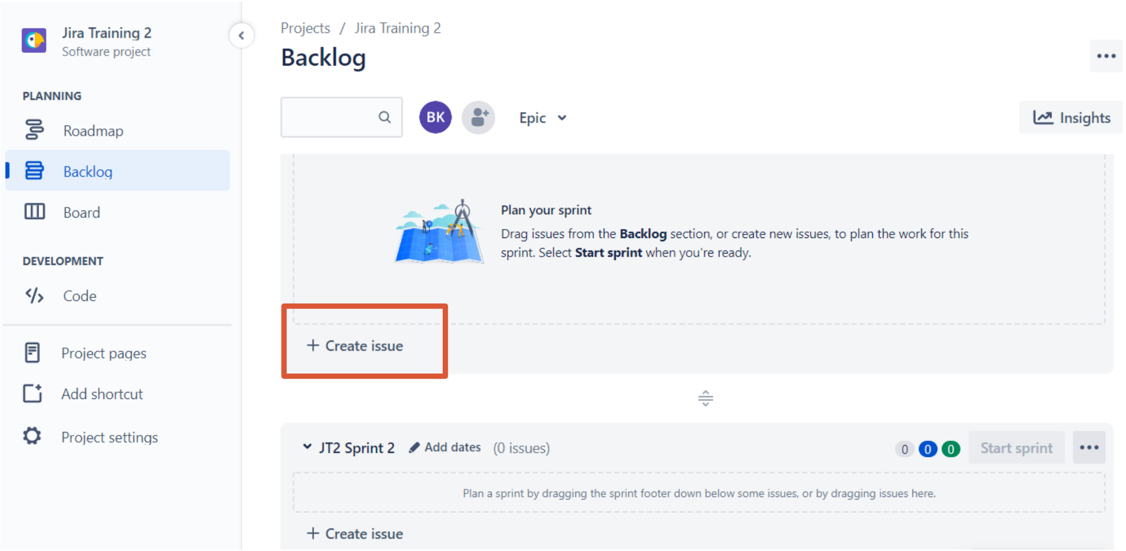
- Click **Create** Sprint



Interface

Exploring the board interface

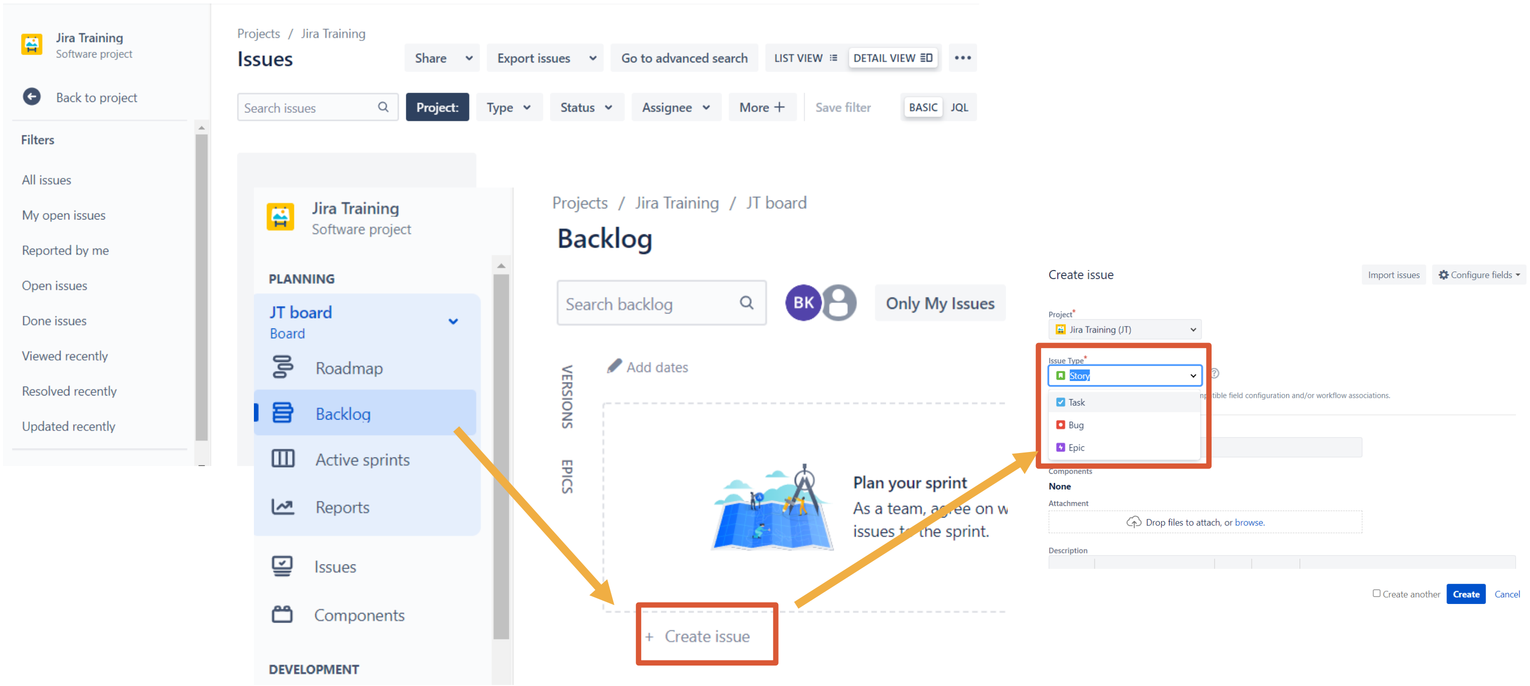
- Click **Create** Issue



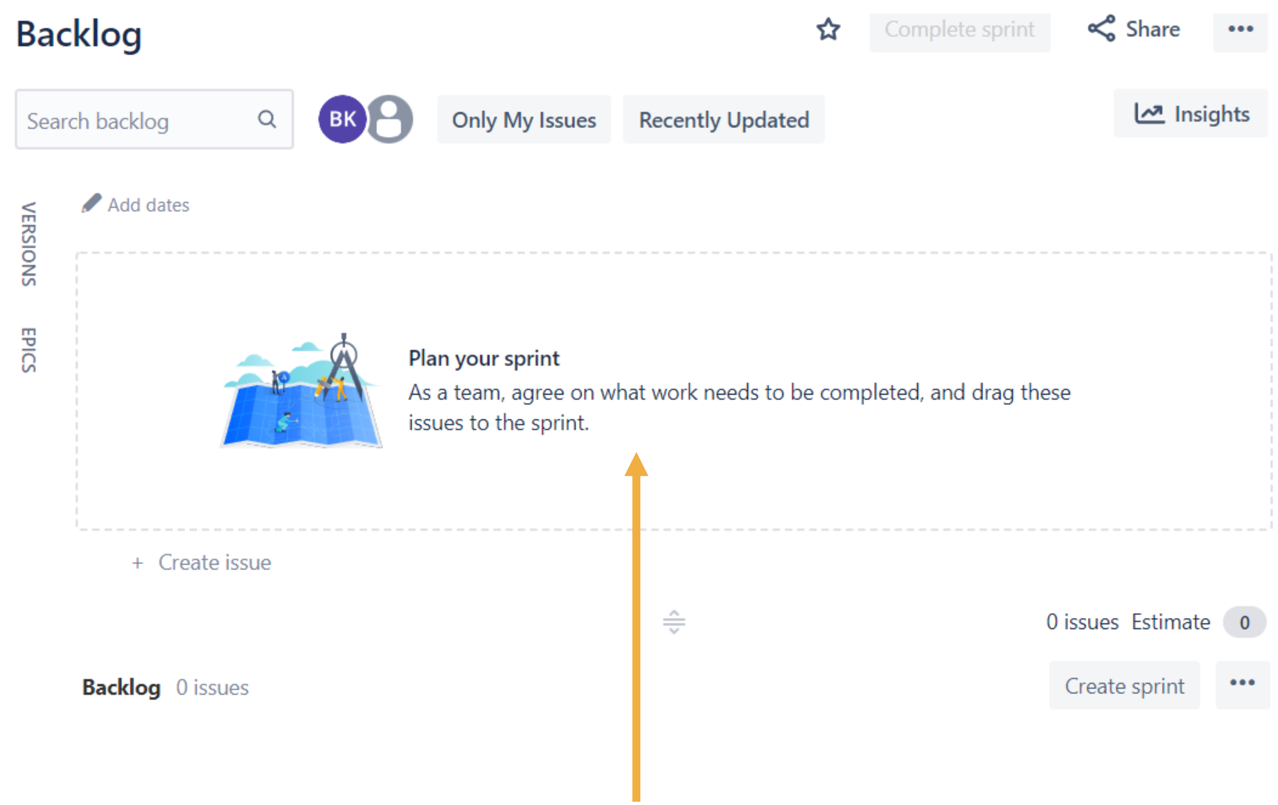
Adding Issues

Adding issues to the board

- In Backlog, click create issue then Story/task/bug



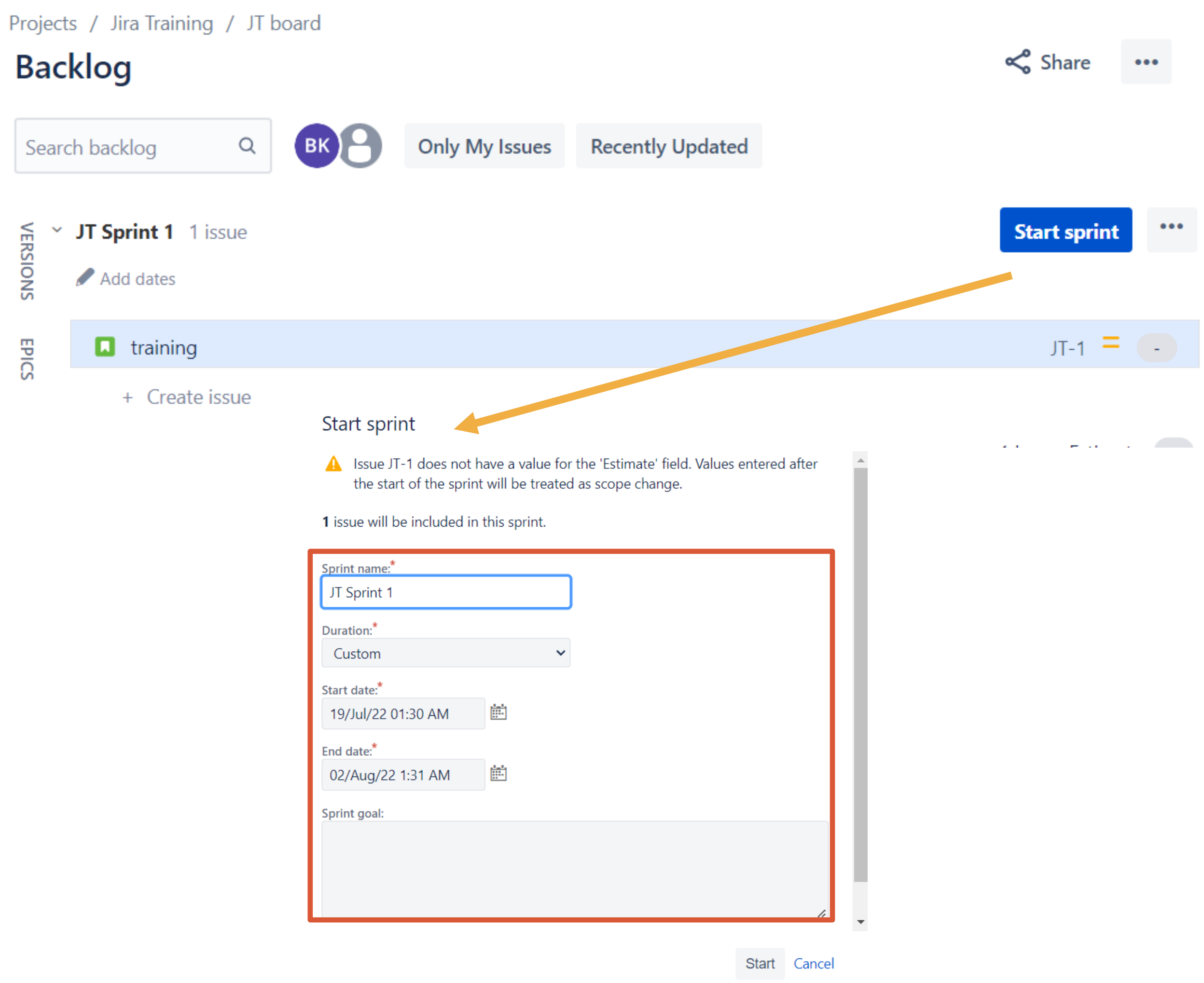
Editing Sprints



Editing sprints in a scrum board

- Move Backlog from the Backlog section to current sprint by dragging it to Sprint section
- Click on Sprint

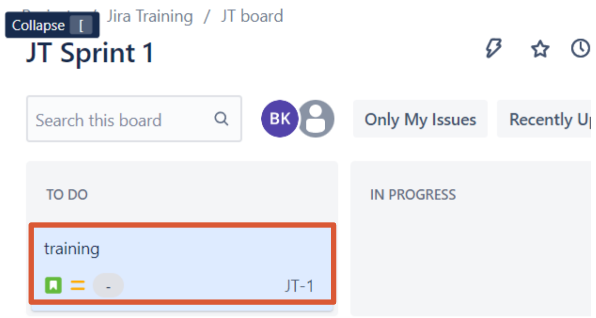
Editing Sprints

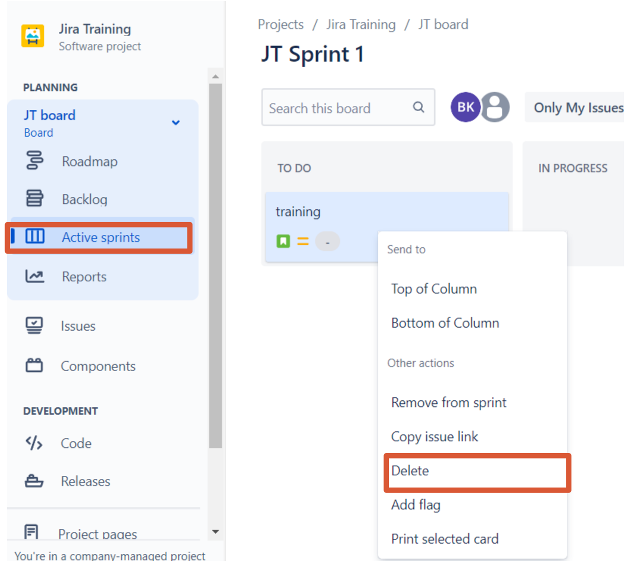


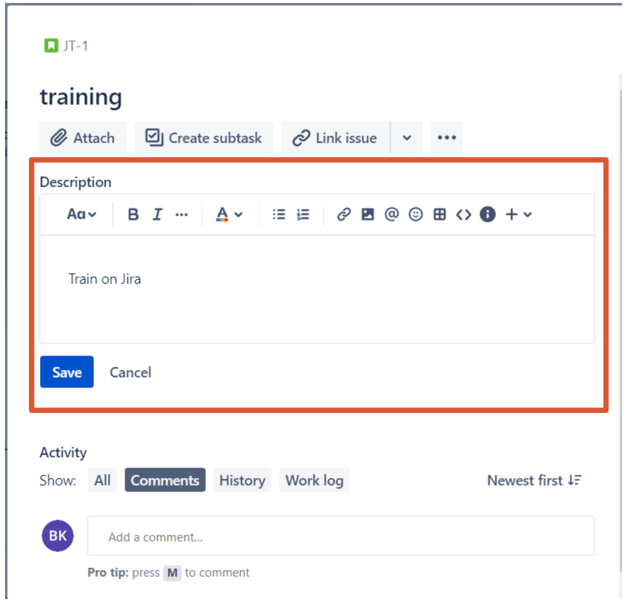
Editing sprints in a scrum board

- Edit fields you need to change

Editing Sprints

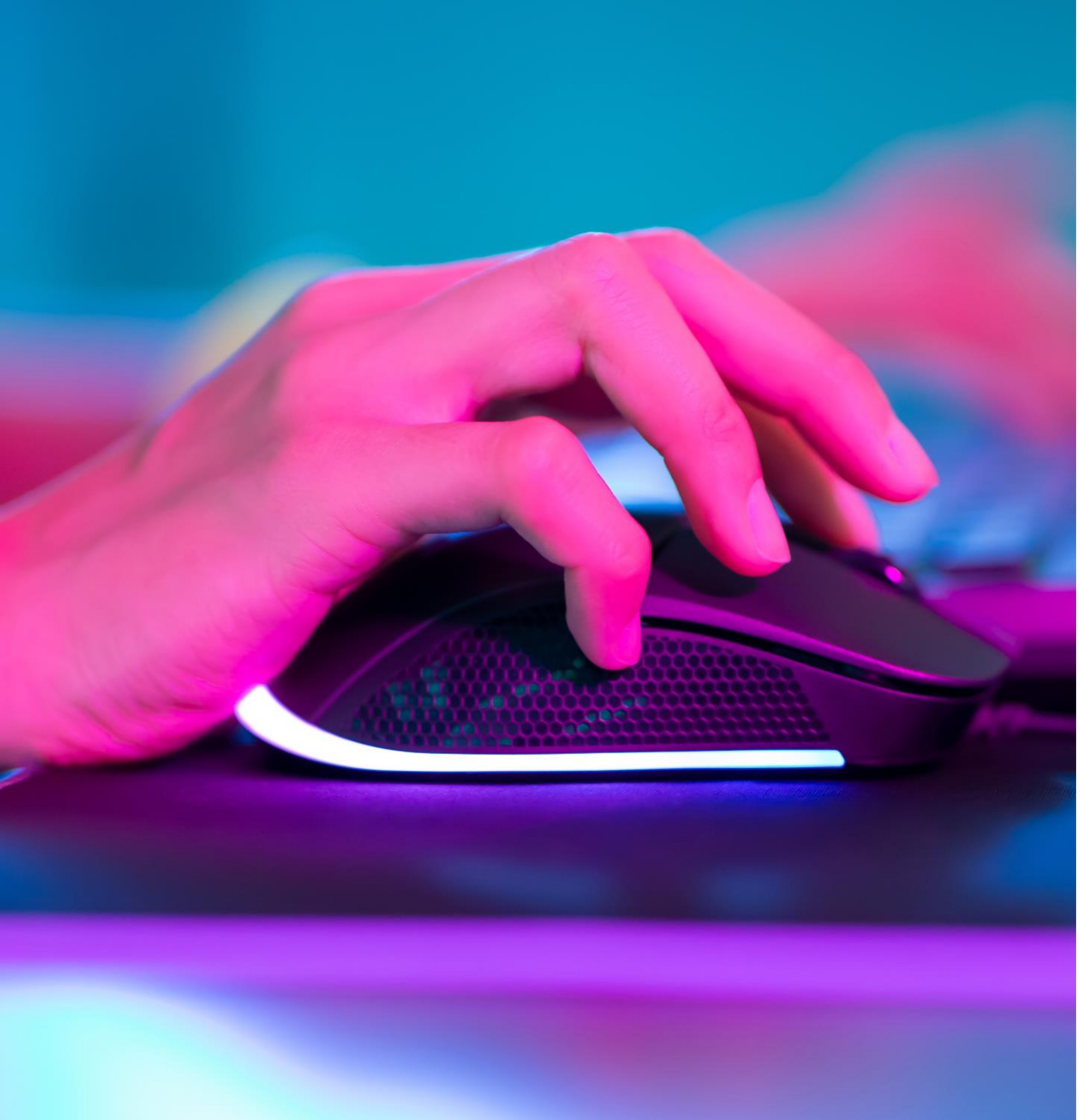






Editing sprints in a scrum board

- Same process, select active sprint, select the sprint, edit or delete

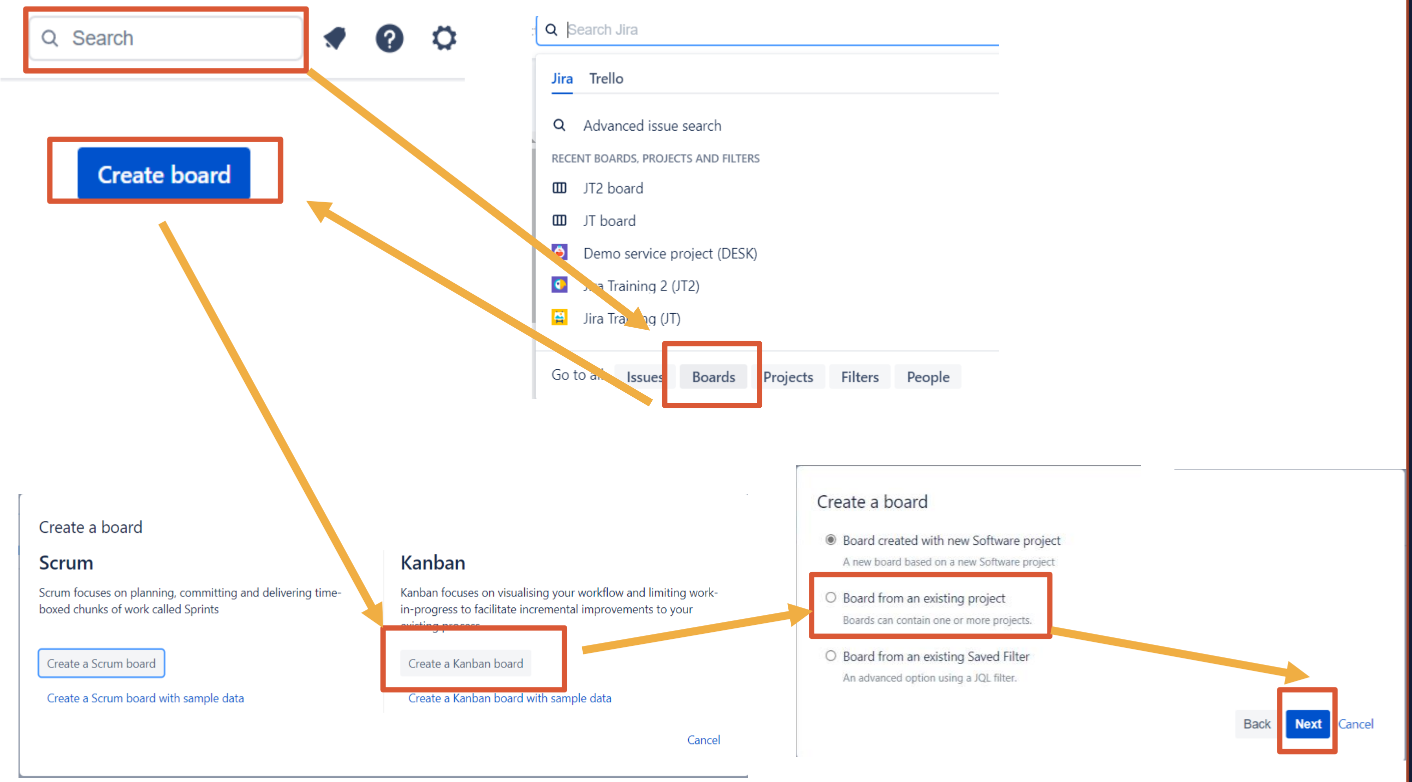


Creating a Kanban Board

Jira enables you to manage projects in a more agile and visual manner with Kanban boards. Kanban boards use cards, columns and helps you visual it's step in your project easily.

In this section, you will learn how to create a Kanban board for an existing project in Jira.

Kanban



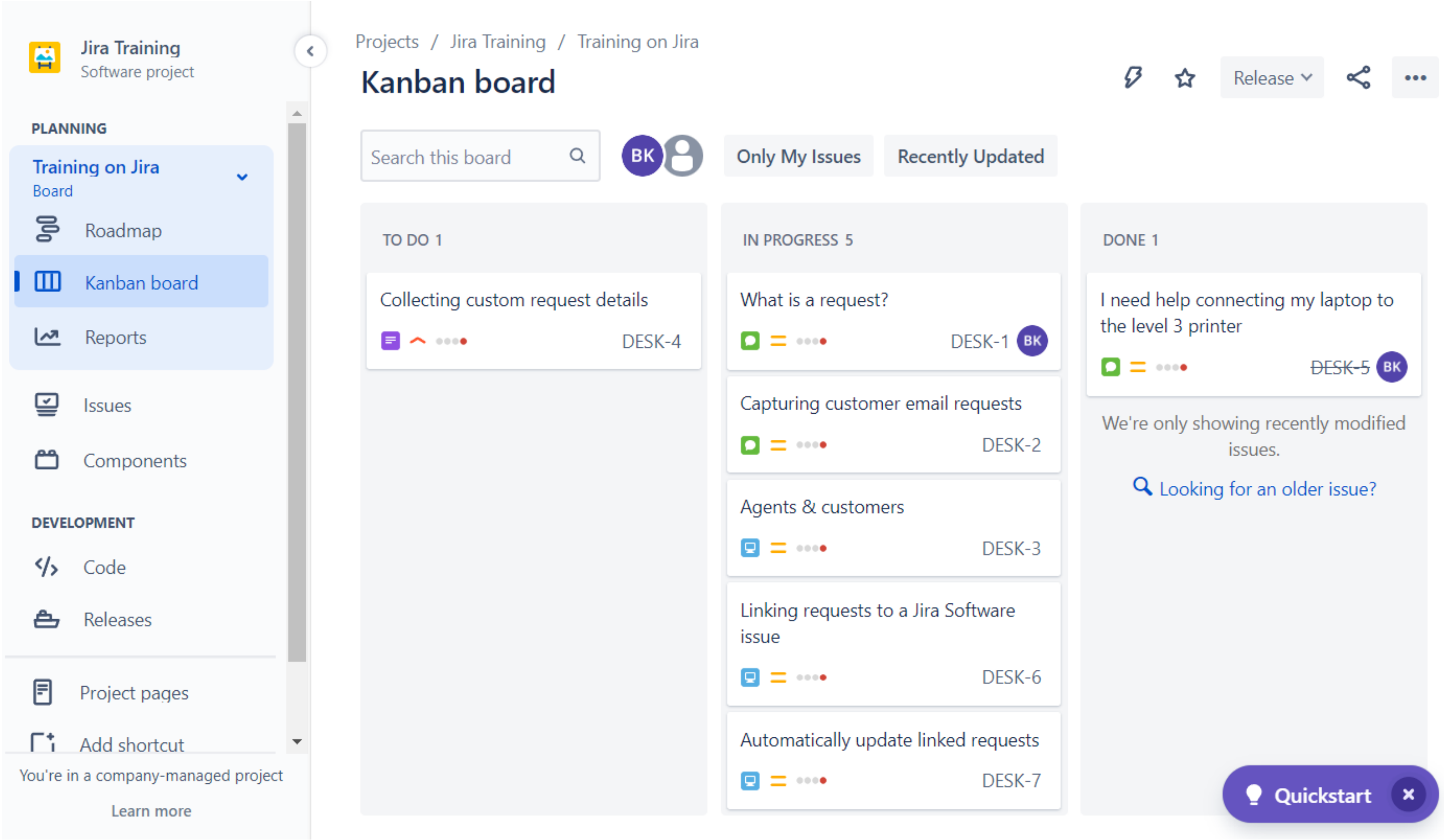
Creating a Kanban board

- Click **Search** in the Global sidebar
- Select **View** all boards
- Click **Create Board** from the top-right side of the page
- Select Create Sample Kanban board
- Choose board from an existing project

Interface

Exploring the board interface

- Explore the issues presented in the Kanban board

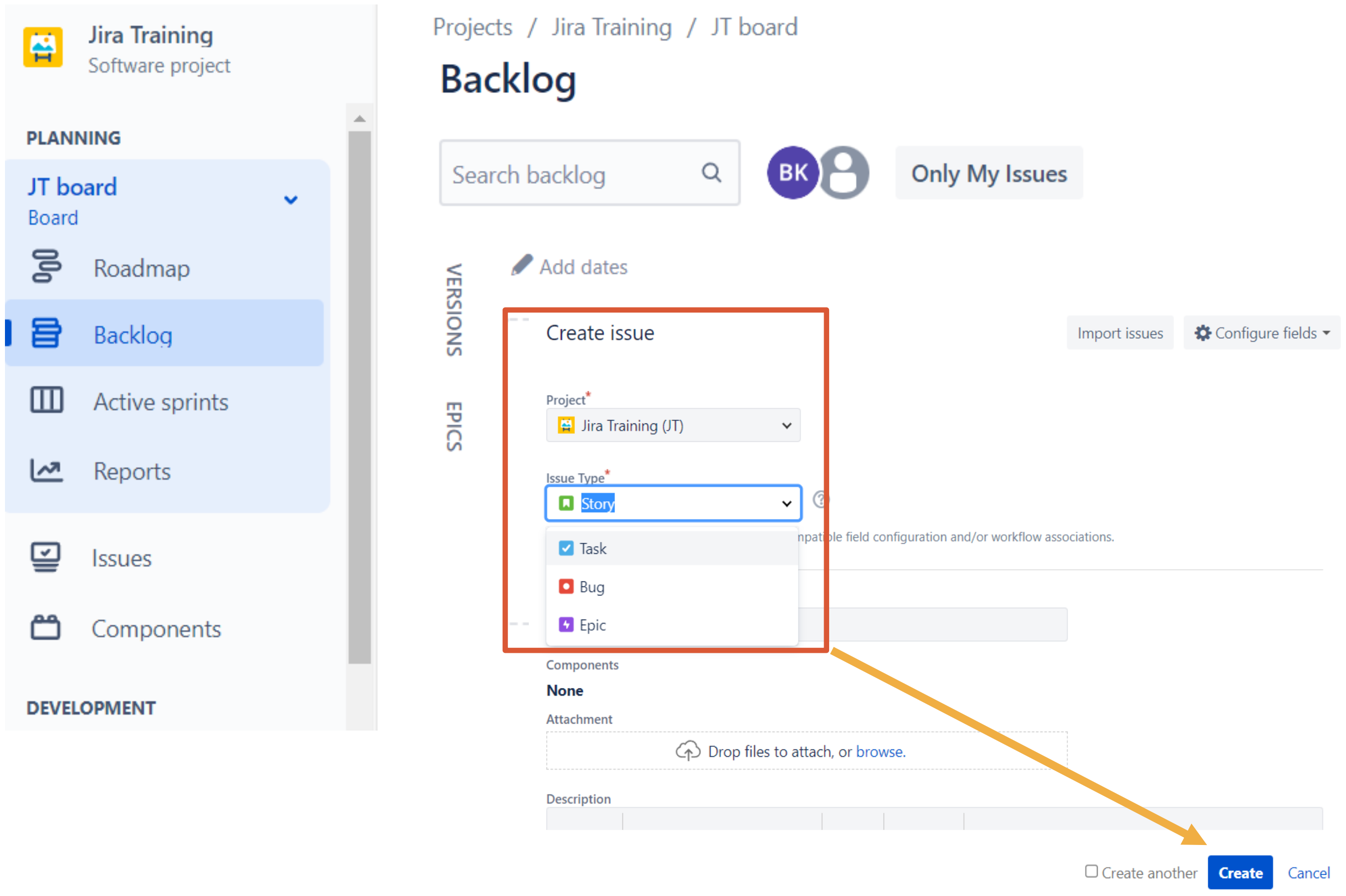


Creating Issues & Subtasks

Issues are the base of all projects in Jira. An issue can represent a story, a task, a bug or other issues types.

You can also create subtasks under existing issues to breakdown larger issues into a more manageable workflow.

Creating an Issue



Adding issues to the board

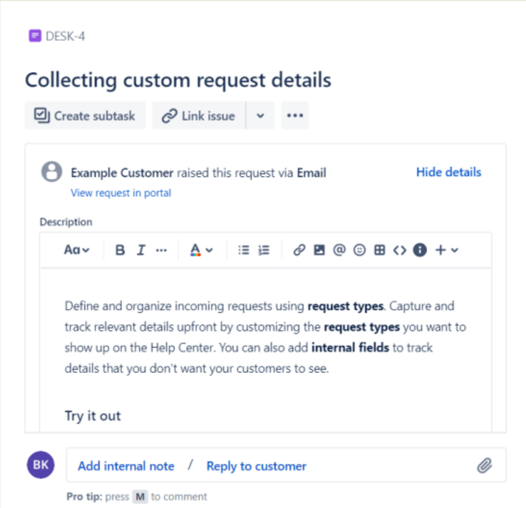
- Choose - Story/task/bug
- Add **notes**
- Click **Create**

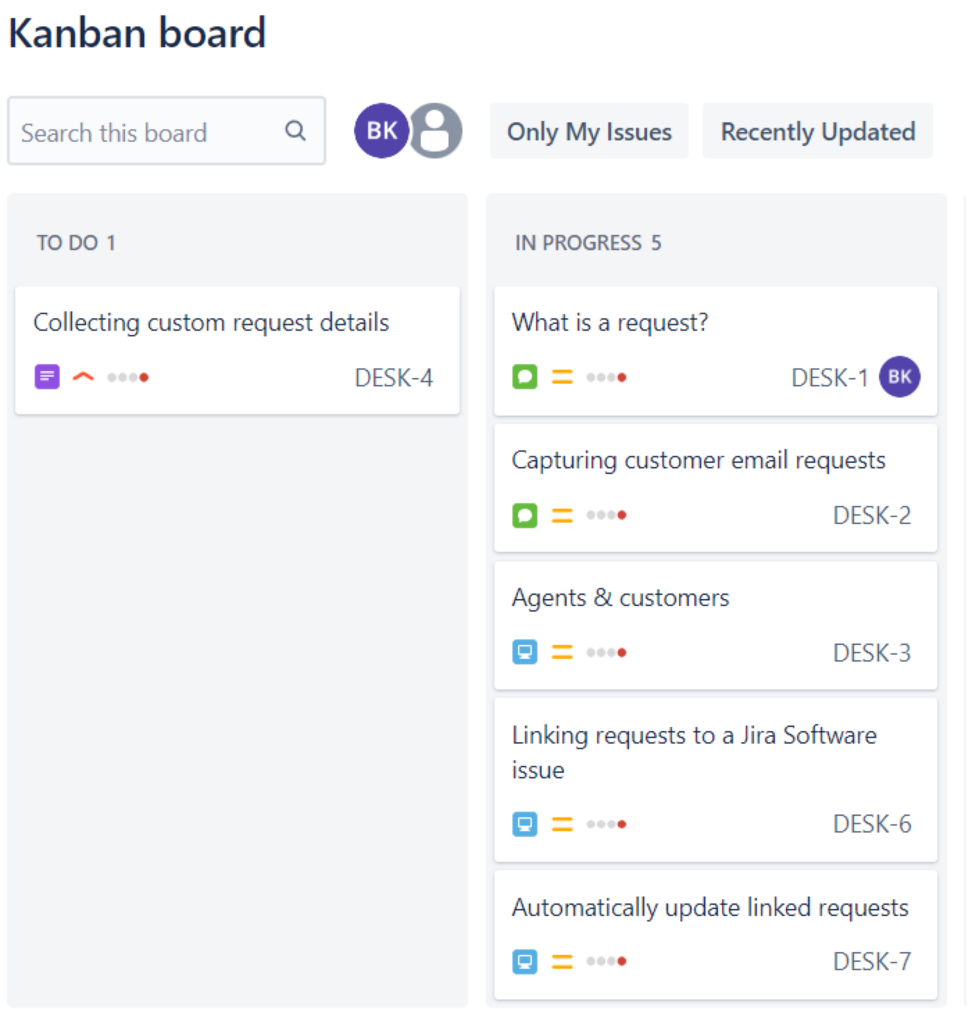
Editing Issues

Editing issues in a Kanban board

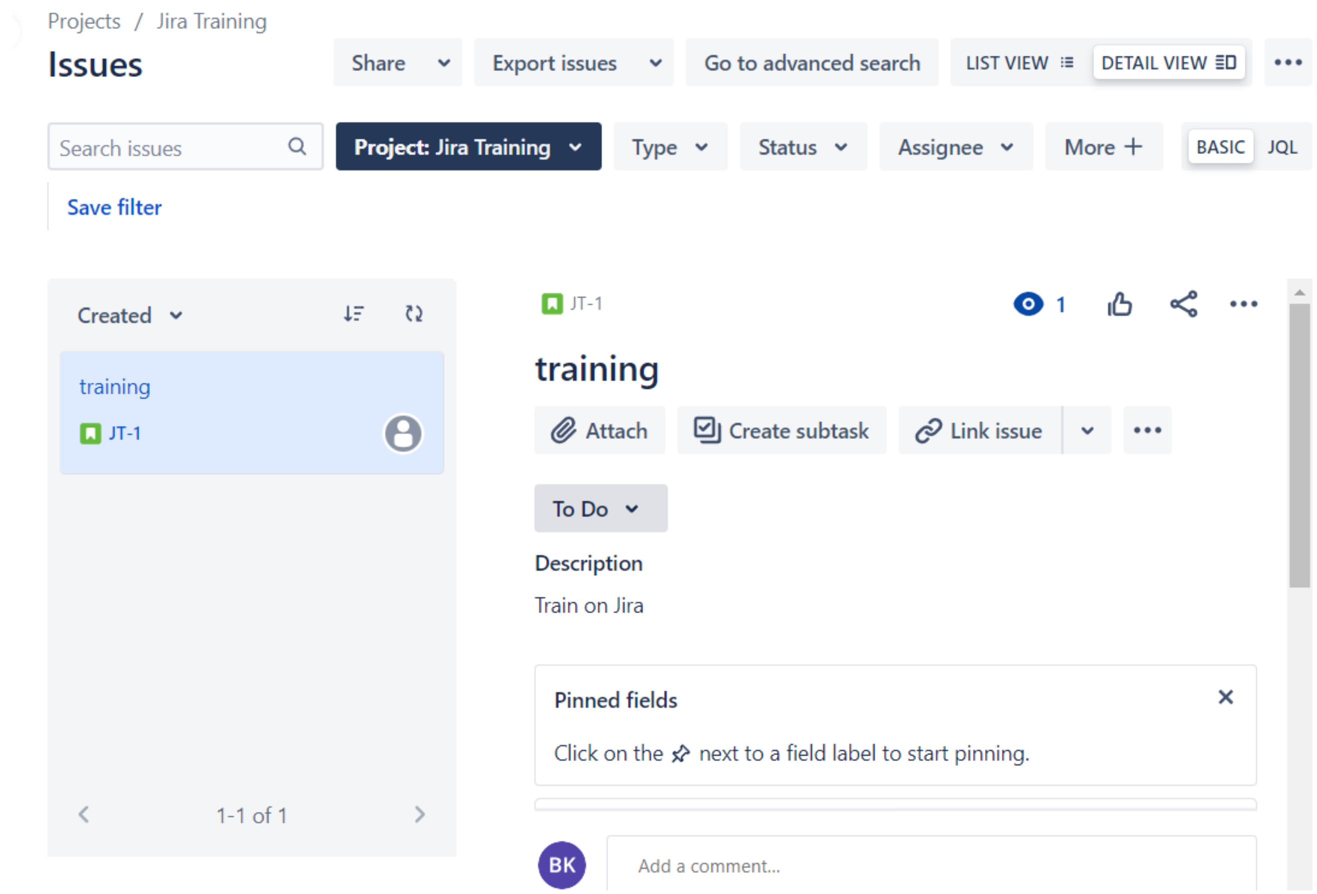
- Move Backlog from the Backlog section to for development/In progress by dragging

To Edit issues, click in the box.





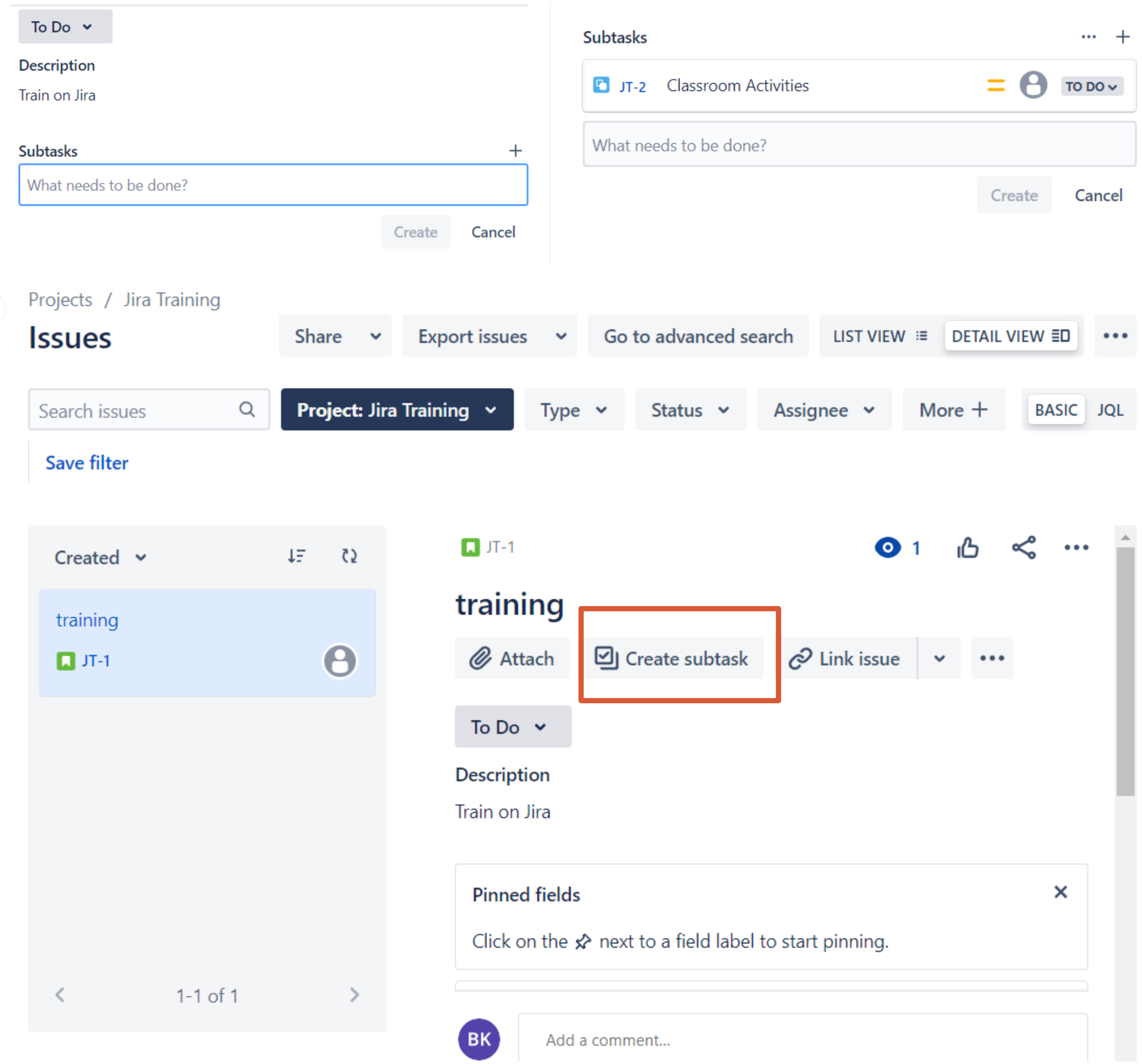
Creating an Issue



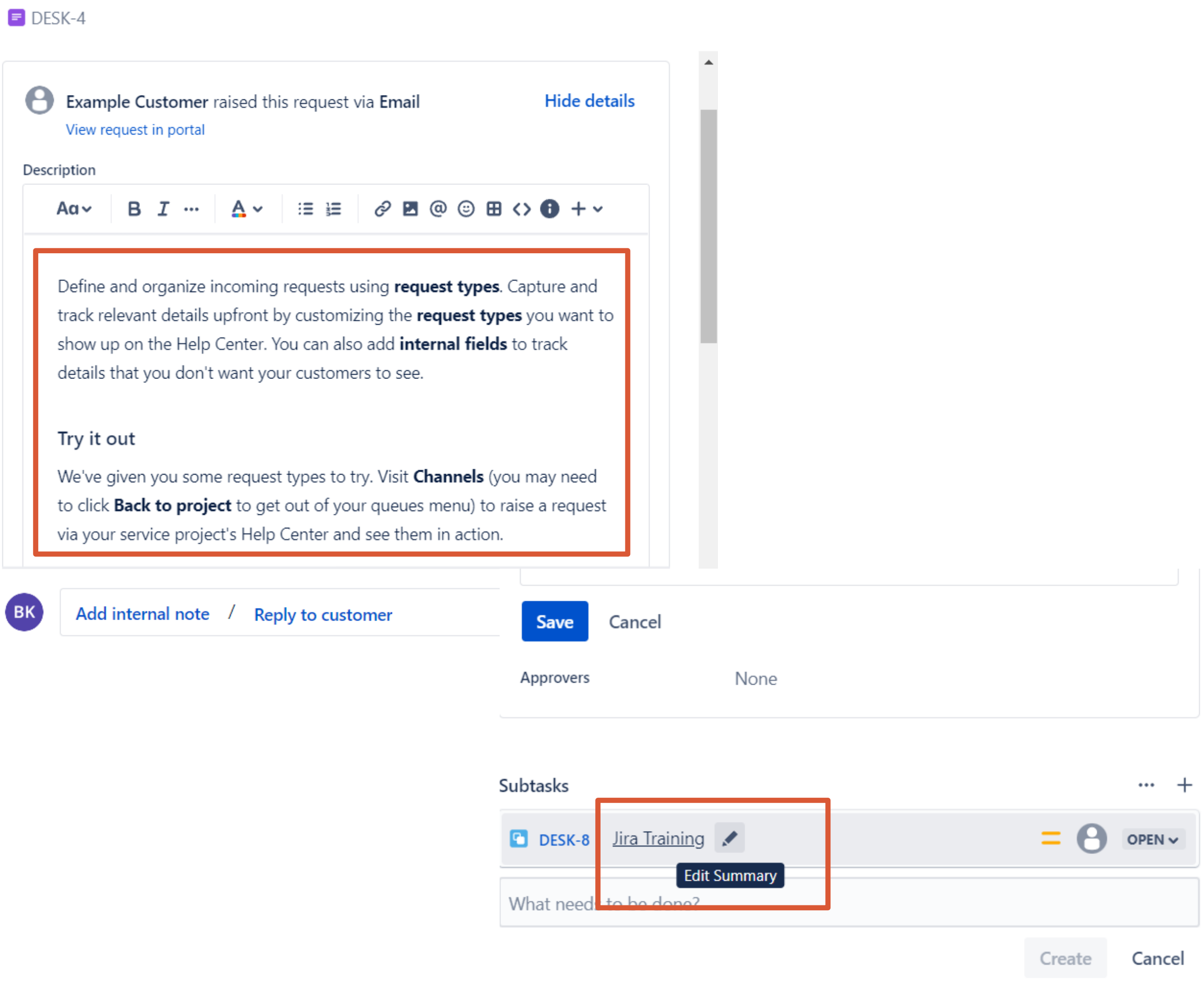
- We have now shown how to create an issue. Let's look at creating a sub-task.

Adding Subtasks

- Select Create subtask
- Add Subtask to display subtasks in board



Editing Issues



- Open task - Edit description &subtask
- Select 'Delete' note that this will remove subtasks as well

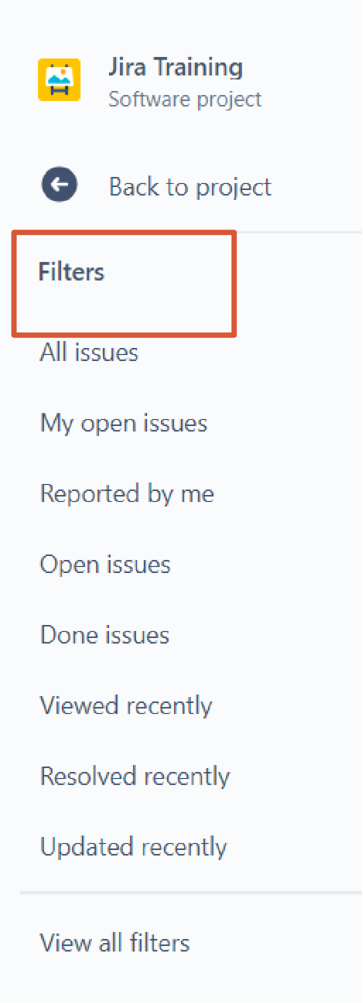
Managing Issues

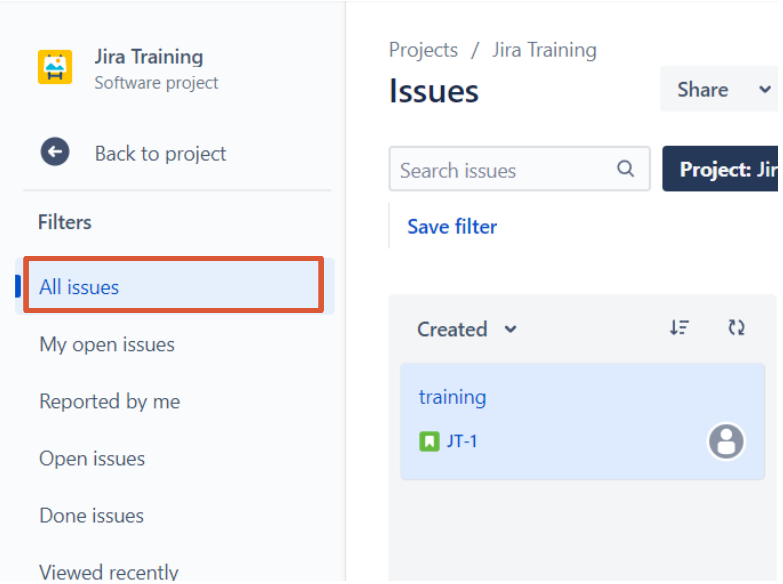
Once you've added issues to your project you'll need to know how to locate and manage your most important issues.

In this section, you will learn how to get a global view on all your issues as well as filter out issues for specific projects in Jira.

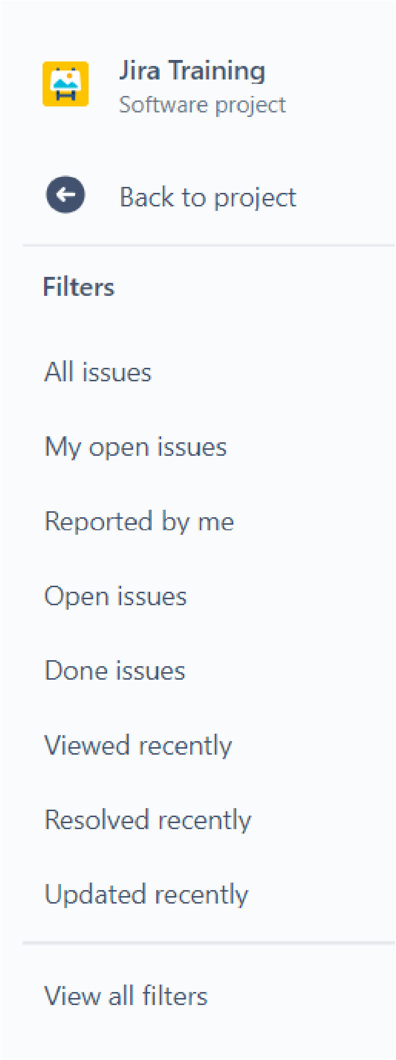
Viewing all Issues

- Select **Issues & Filters** from the side menu
- Select **All issues** from the side menu





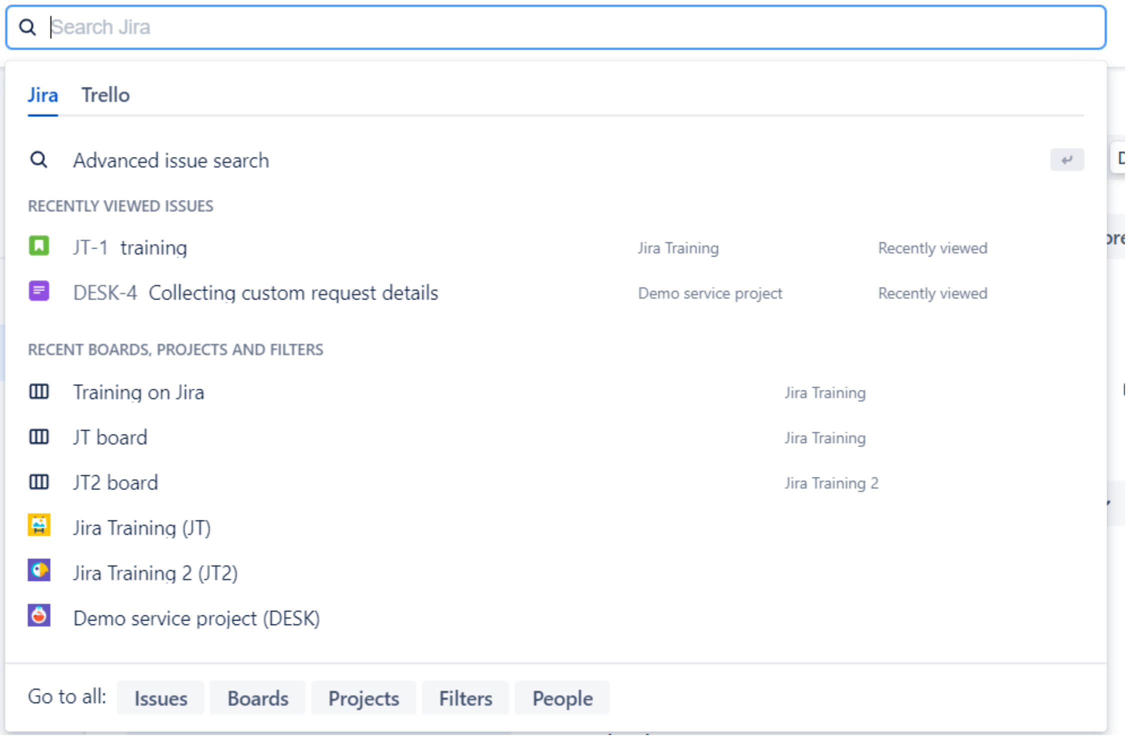
Filtering Issues



- Use the side menu options to filter out issues (All issues, open issues, done issues)

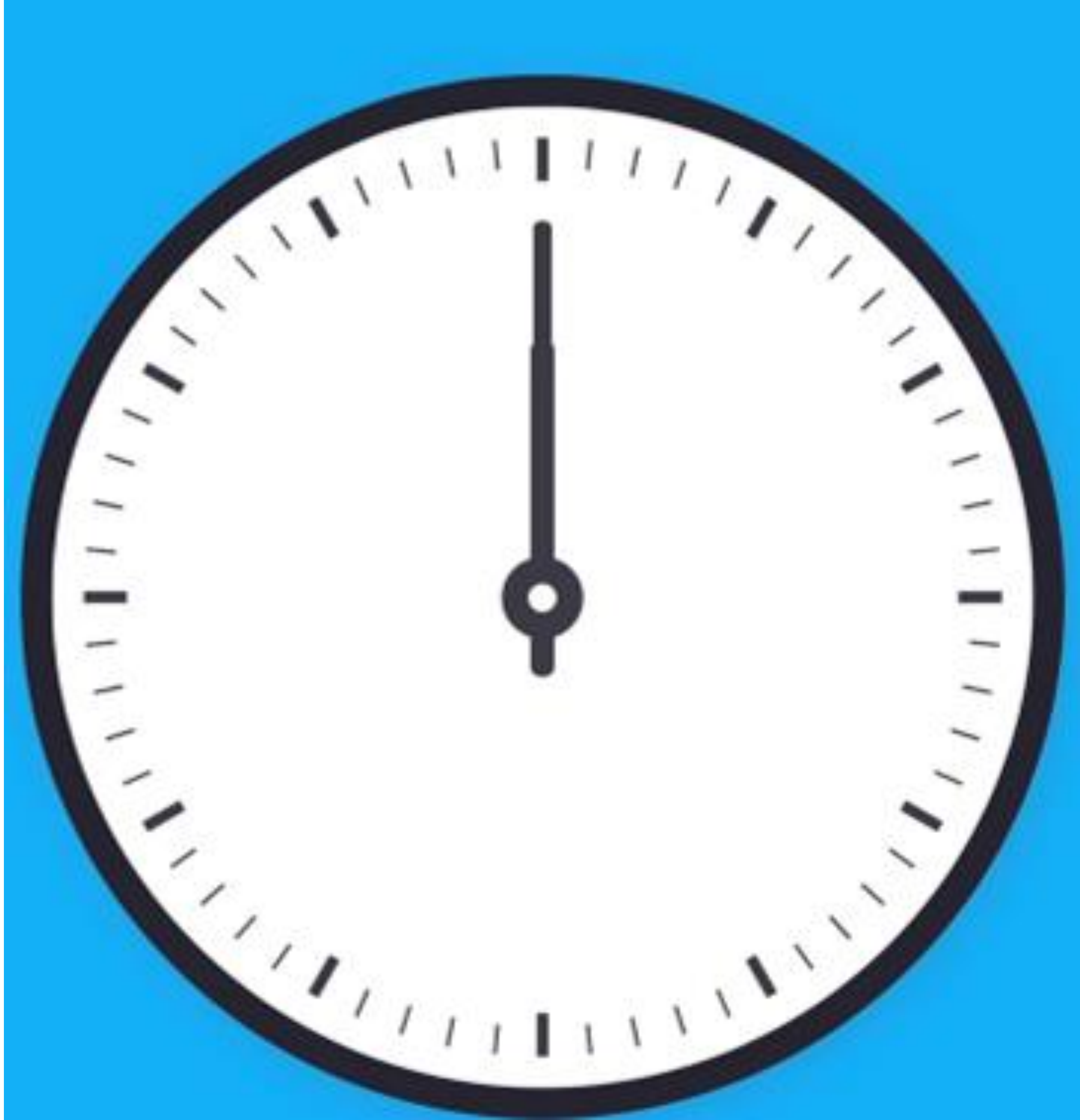
Managing Issues in Projects

- Go to **Search** in the global sidebar
- Select **issues** at the bottom of the menu
- Select **Project - Filter** for project/type/status etc.



Questions?

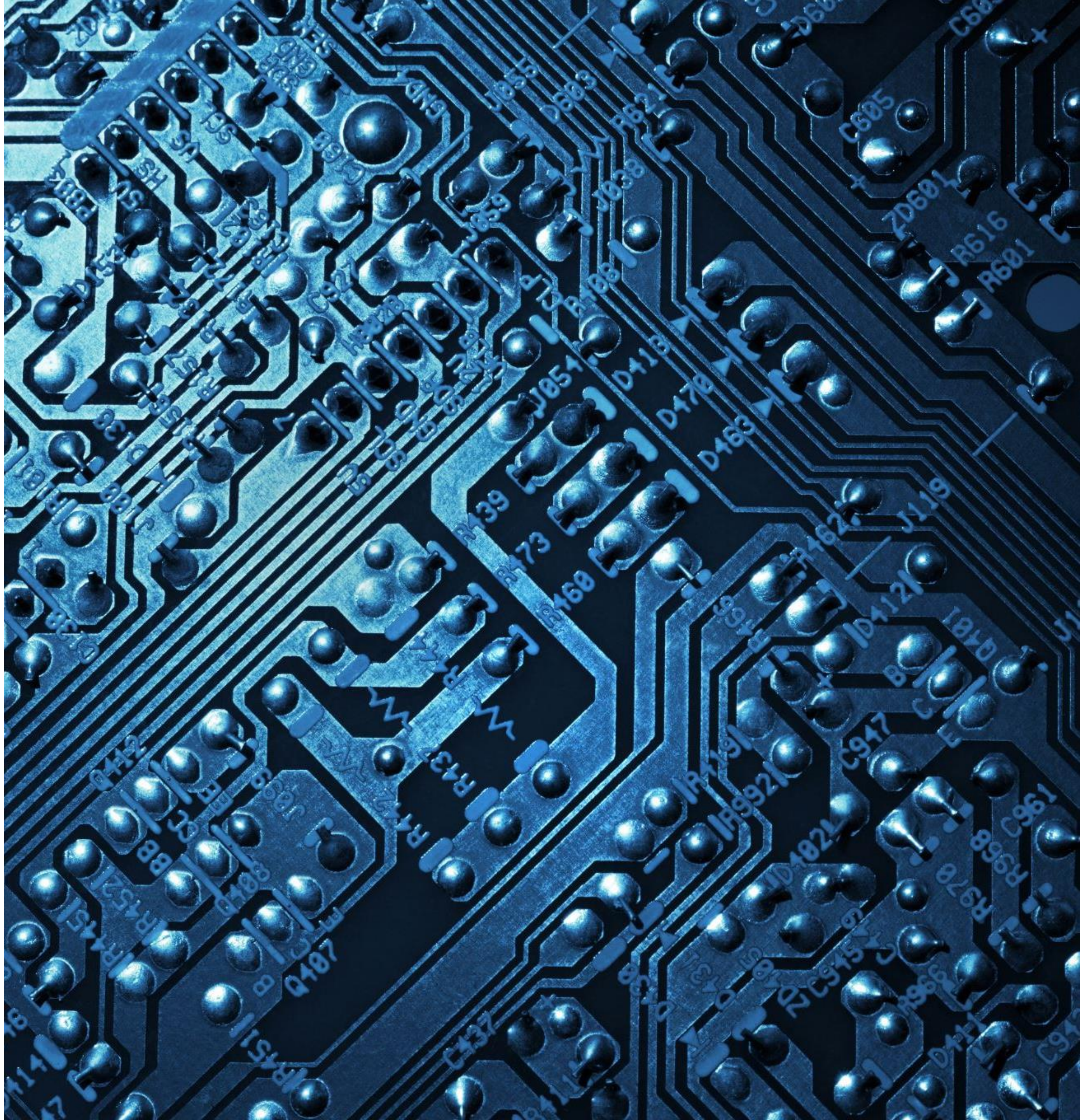
Take a 10-minute Break!



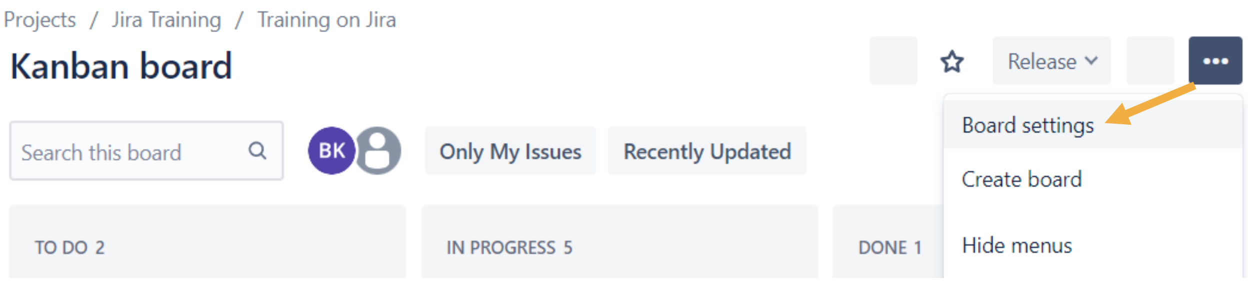
Board Configuration

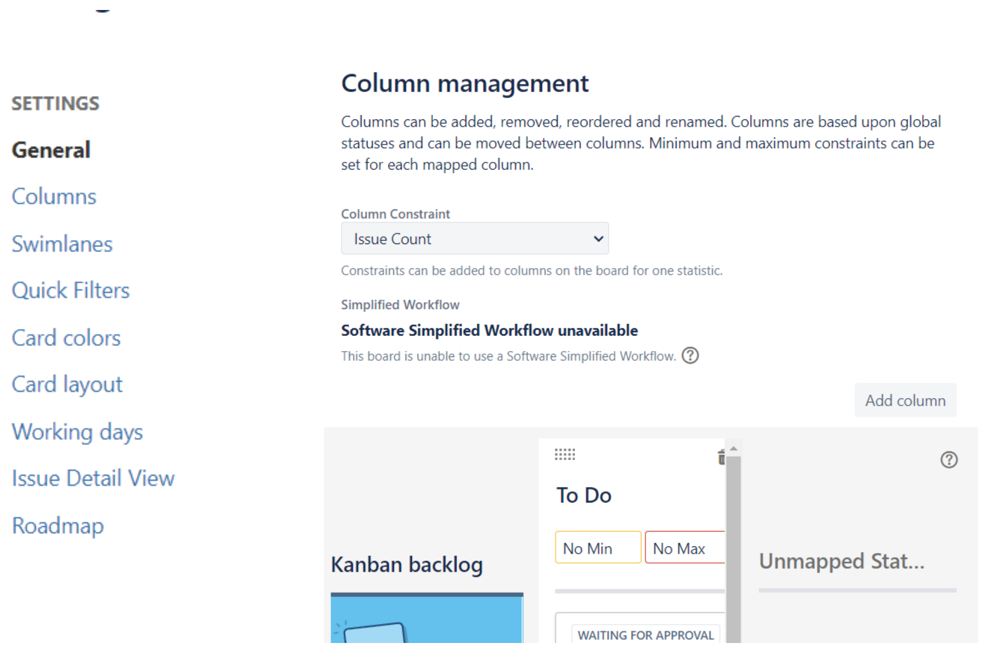
The Kanban and scrum board in your Jira projects can be customized and configured to meet your projects needs.

In this section, you will learn how to adjust columns, card color and display options from the board settings menu.



Configuring a Board



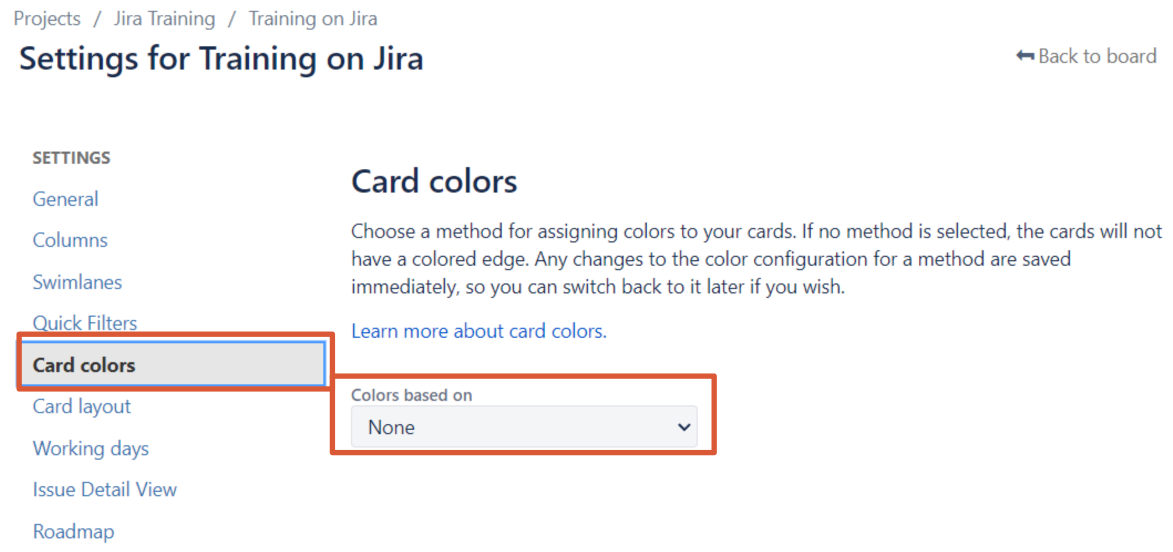


Configuring a board (for Kanban & scrum)

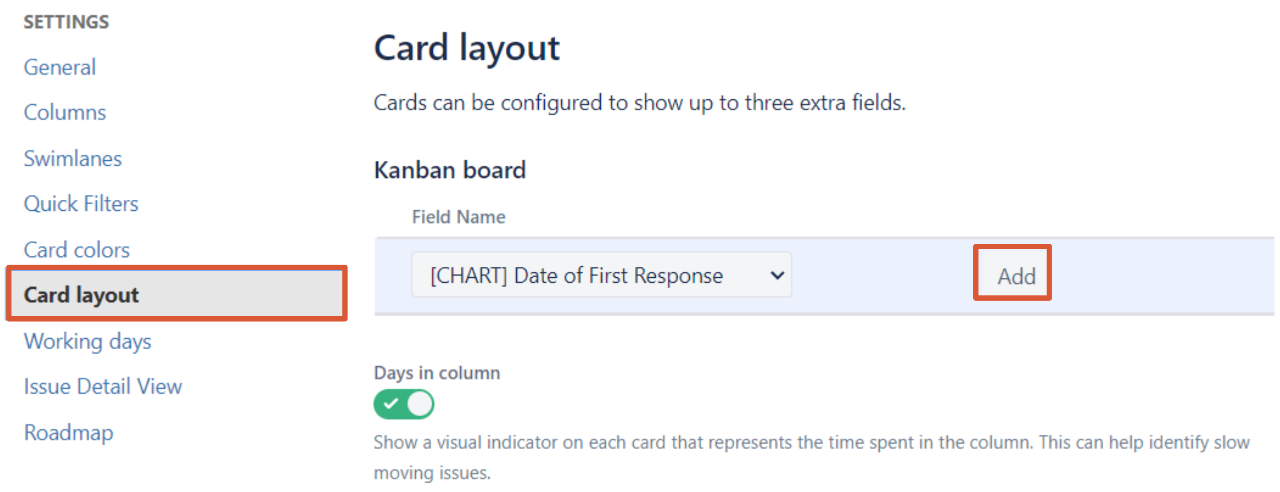
- From Kanban board - Select **More options** top right -Select 'Board settings'
- From **General**, Manage Kanban columns (move, edit, delete)
- Add status & Column

Adding Color to the Board

- Select **Card Colors** from the setting menu
- Show **color options** from Colors based on menu



Modifying the Card View



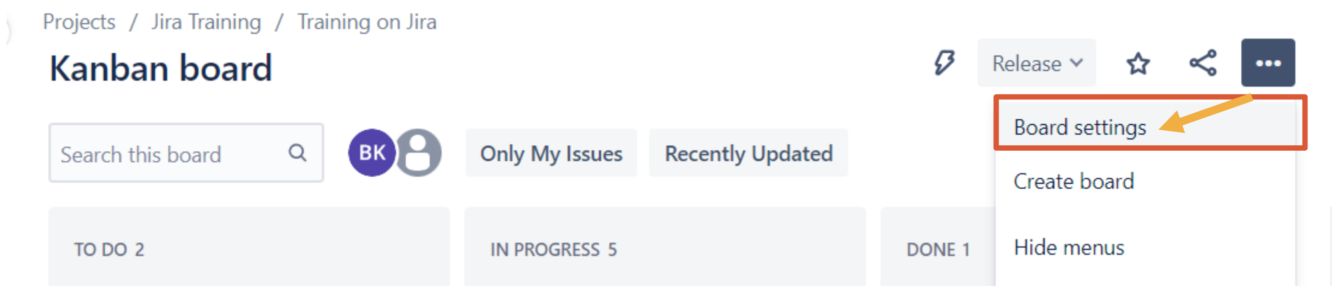
- Select **Card layout** from setting menu
- Field name options
- **Add** field name
- Or **Delete** field name

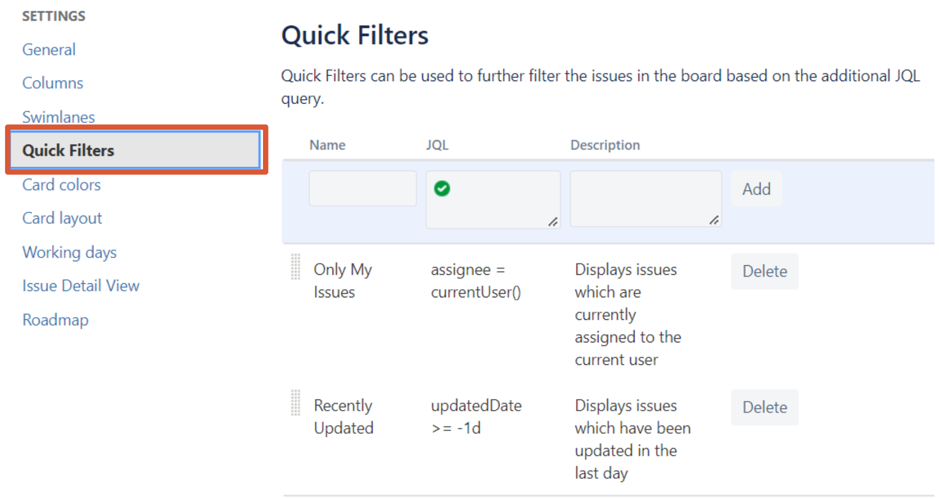
Managing Board Filters

Board filters allow you to visualize the information you need most from the board interface.

In this section, you will learn how to access the board filters, edit existing filters and even add new filters you your project board in Jira.

Accessing Board Filters

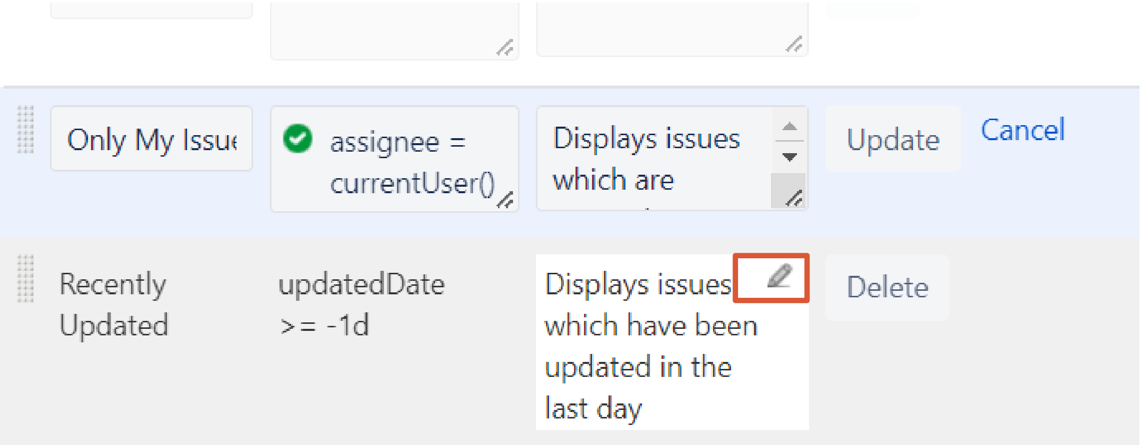




- Click on Projects
- Select the relevant project
- Click the More icon (•••) at the top right followed by Board settings
- Click Quick filters

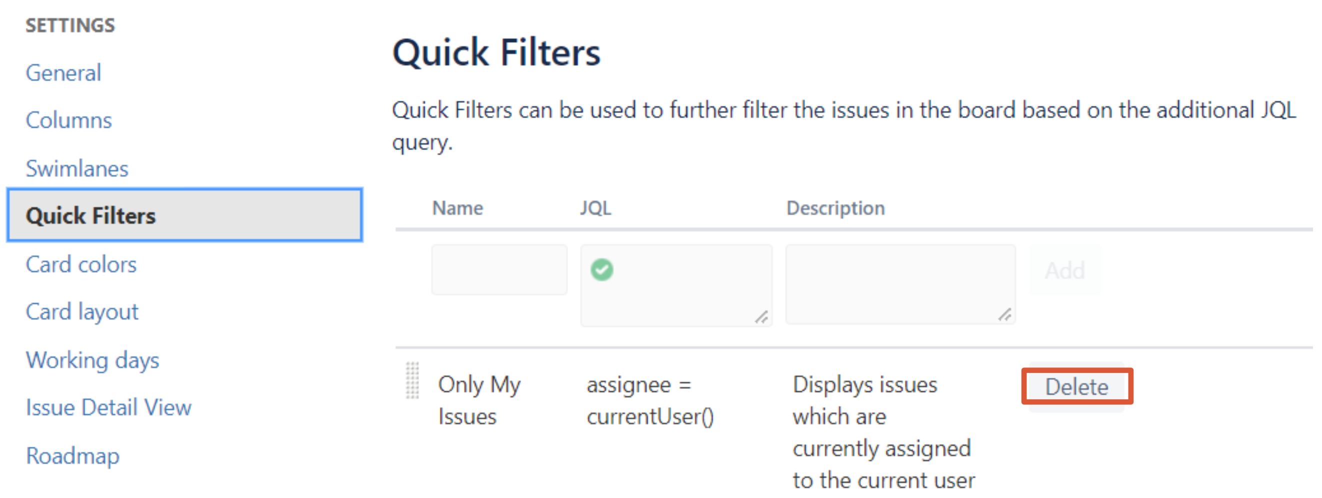
Editing Board Filters

- Halfway down the page, hover over the name of the Filter displayed in the Saved Filter field and wait for a Pencil icon to appear
- Click on it and select different filters for the current board and press **Enter**



Removing Filters

Select Delete next to filter




Great Job!

Questions?

In Summary:

You are now able to:

1. Create **SCRUM** and **Kanban Boards**
2. Create and manage **issues** and **subtasks**
3. Create **stories**
4. **Manage board configurations** and **board filters**

Thank you for taking this course.