



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 and 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.

The screenshot shows the Jira application interface. At the top, there is a navigation bar with icons for Your work, Projects, Filters, Dashboards, People, Apps, and a Create button. A search bar and some user-specific icons are also at the top right. Below the navigation bar, the title "Jira Training" and "Software project" is displayed. On the left, a sidebar titled "PLANNING" contains links for "JT board" (which is selected and highlighted in blue), Roadmap, Backlog, Active sprints (also highlighted in blue), and Reports. Below this, there are links for Issues and Components. A note at the bottom of the sidebar says "You're in a company-managed project" with a "Learn more" link. The main content area shows "Active sprints" for the "JT board". It includes a search bar, filter options for "Only My Issues" and "Recently Updated", and three columns for "TO DO", "IN PROGRESS", and "DONE". At the bottom right, there is a "Quickstart" button with a help icon and a close button.

Register for Jira

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

- 1  **ATLASSIAN**
One moment, your site is starting up

When you get in, explore all the products you're evaluating.
Create a project to explore your Jira products' features.



Jira Software
The #1 software development tool used by agile teams. Plan, track, and release world-class software

Jira Service Management
Collaborate at high-velocity, respond to business changes and deliver great customer and employee service experiences fast.
- 2 **Help us set up your Jira Software**

I am  Jira Software.

new to
 experienced with

[Skip](#) [Next](#)
- 3 **Invite your teammates**
Bring your team along for the ride!

Add email address

Add email address

Add email address

Let my teammates invite other people to our site

You can change these settings at any time. [Continue](#)
- 4 **Add project details**
You can change these details anytime in your project settings.

Name

Key 

Template	Change template
 Scrum RECOMMENDED Sprint toward your project goals with a board, backlog, and roadmap.	Change template
Type	Change type
 Company-managed RECOMMENDED Work with other teams across many projects in a standard way.	Change type

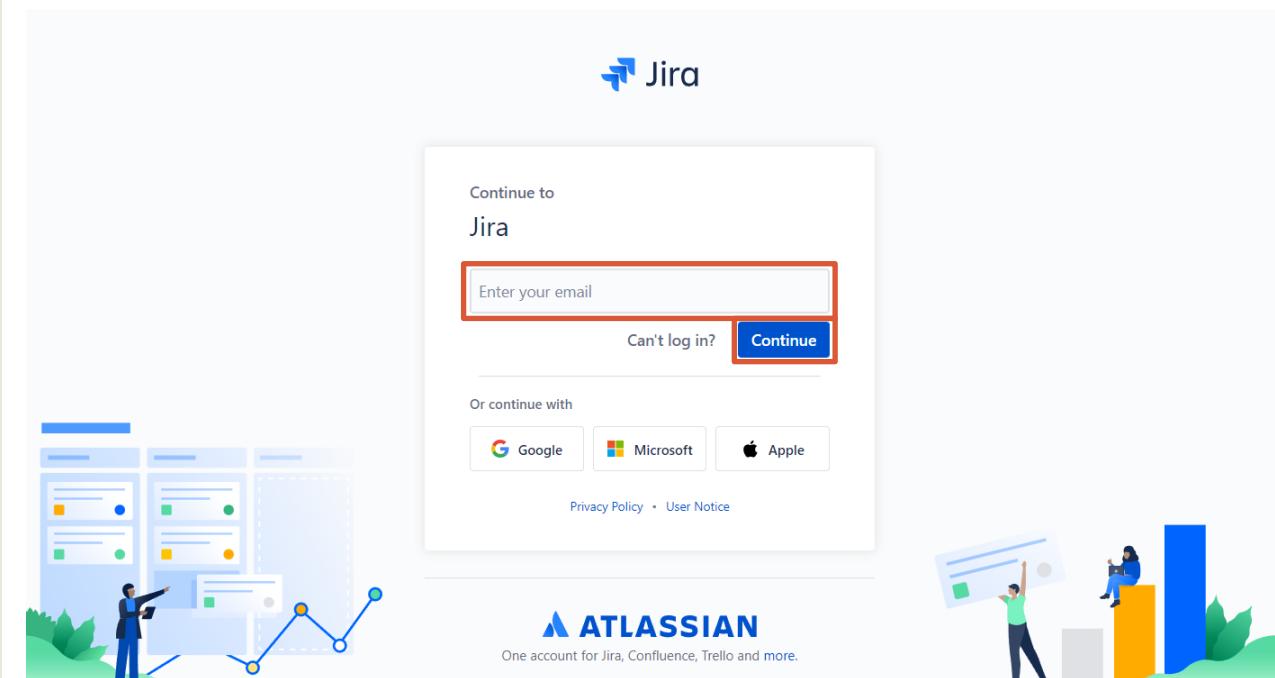
[Back](#) [Create project](#)

Signin to your Account

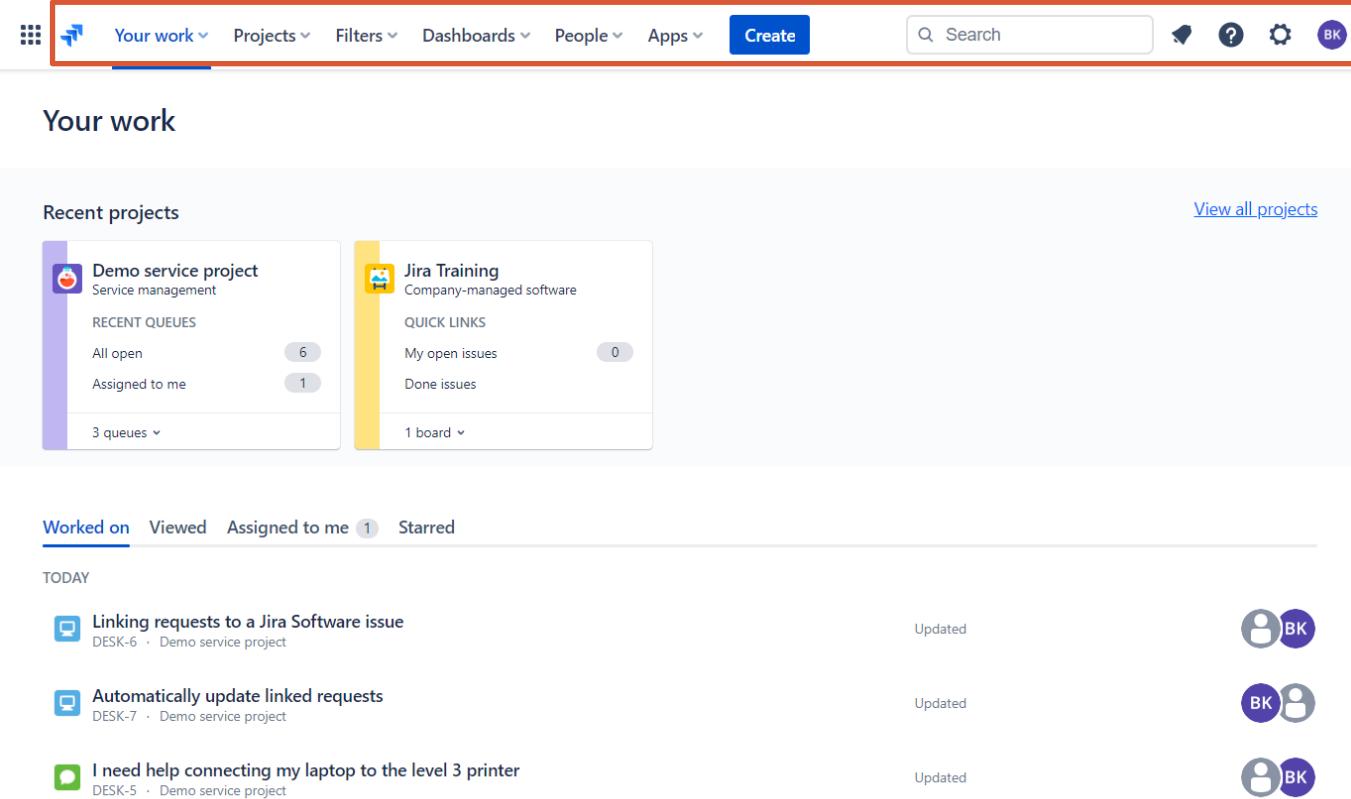
- Sign in with email/password
- Click **Continue**

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



The screenshot shows the Jira Software interface. At the top, there is a navigation bar with the following items from left to right: a grid icon, 'Your work' (highlighted with a red border), 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', a 'Create' button, a search bar with the placeholder 'Search', and three icons: a gear, a question mark, and a 'BK' logo.

The main area is titled 'Your work'. It features a 'Recent projects' section with two cards:

- Demo service project** (Service management): RECENT QUEUES - All open (6), Assigned to me (1). A dropdown menu shows 3 queues.
- Jira Training** (Company-managed software): QUICK LINKS - My open issues (0), Done issues. A dropdown menu shows 1 board.

Below this is a filter bar with tabs: 'Worked on' (selected), 'Viewed', 'Assigned to me (1)', and 'Starred'.

The 'TODAY' section lists three updates:

- Linking requests to a Jira Software issue** (DESK-6 · Demo service project) - Updated, status: **BK**
- Automatically update linked requests** (DESK-7 · Demo service project) - Updated, status: **BK**
- I need help connecting my laptop to the level 3 printer** (DESK-5 · Demo service project) - Updated, status: **BK**

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

The screenshot shows the Jira 'Your Work' page. At the top, there is a navigation bar with icons for 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. Below the navigation bar, the title 'Your work' is displayed. Under 'Recent projects', there are two cards: 'Demo service project' (purple icon) and 'Jira Training' (yellow icon). Each card lists 'RECENT QUEUES', 'All open' (6), 'Assigned to me' (1), and a dropdown for '3 queues'. Below the cards, there is a horizontal navigation bar with tabs: 'Worked on' (underlined in blue), 'Viewed', 'Assigned to me (1)', and 'Starred'. A red box highlights the 'Worked on' tab. To the right of this bar is a 'Load new activity' button. At the bottom, under the heading 'TODAY', there is a single activity item: 'Linking requests to a Jira Software issue DESK-6 · Demo service project'.

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

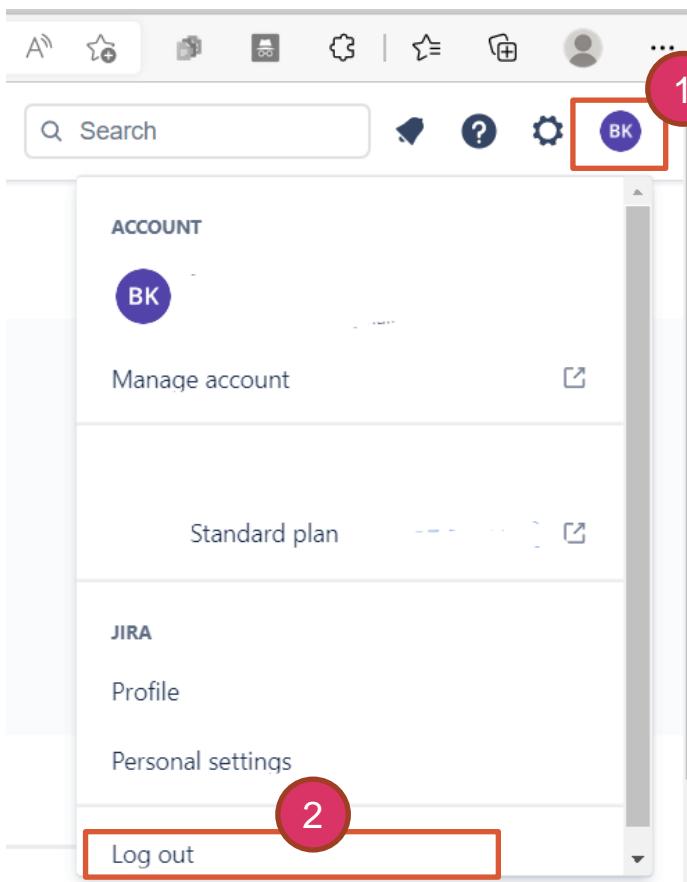
Help and Settings

The screenshot shows the Jira application interface. At the top, there is a navigation bar with a search bar, a bell icon, a help icon (highlighted with a red box), a settings gear icon, and a 'Create' button. Below this is a secondary search bar. The main content area has a header 'Help' with a close button. On the left, there is a sidebar with various links: 'Find out what's changed in Jira', 'Browse complete documentation', 'Learn with Atlassian University', 'Ask our community forum', 'Contact support', 'Give feedback about Jira', 'Keyboard shortcuts', and 'Get Jira Mobile'. The right side of the screen displays the 'Jira Settings' and 'Personal Settings' sections. The 'Jira Settings' section includes links for System, Products, Projects, Issues, and Apps. The 'Personal Settings' section includes links for Atlassian account settings and Personal Jira settings. A vertical scroll bar is visible on the right side of the settings panels.

- 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.



A screenshot of the Atlassian logout confirmation dialog. It features the Atlassian logo at the top. The main heading is 'Log out of your Atlassian account'. Below it is a large blue button labeled 'Log out', which is highlighted with a red box and a red circle with the number '3' around it. There is also a smaller 'Log in to another account' link. At the bottom, there are links for 'Privacy Policy' and 'User Notice'. The Atlassian logo is also present at the bottom of the page.

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.

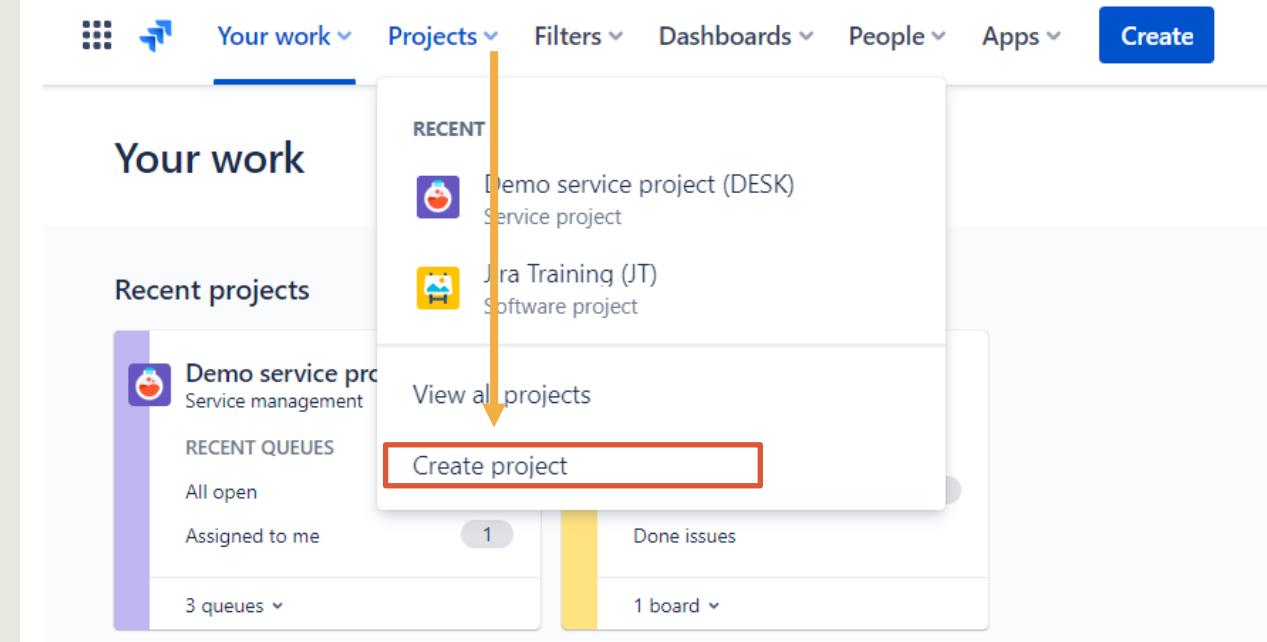
Follow along and you will learn how you can quickly create a new project by choosing a project template such as Kanban, Scrum or Bug Tracking.



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 chooses the SCRUM template.

The screenshot shows a software interface for selecting project templates. On the left, a sidebar lists categories: Project templates, Software development (selected), Service management, Work management, Marketing, Human resources, Finance, Design, Personal, Operations, Legal, and Sales. A large orange arrow points from the 'Software development' category in the sidebar to the 'Scrum' template card. The 'Scrum' card features a blue circular arrow icon and the text: 'Sprint toward your project goals with a board, backlog, and roadmap.' To the right of the Scrum card is a cartoon character of a man in a suit with arms outstretched. At the top right, there is a section titled 'Software development' with the sub-section 'Kanban' and its description: 'Visualize and advance your project forward using issues on a powerful board.' Below that is the 'Bug tracking' section with its description: 'Manage a list of development tasks and bugs.'



Creating a Project

- Select project type

[← Back to project templates](#)

1 Project template



Scrum

Sprint toward your project goals with a board, backlog, and roadmap.

[Change template](#)

2 Choose a project type

⚠ You'll need to create a new project if you decide to switch project types later.

[Team-managed](#)

Set up and maintained by your team.

For teams who want to control their own working processes and practices in a self-contained space. Mix and match agile features to support your team as you grow in size and complexity.

[Select a team-managed project](#)

[Company-managed](#)

Set up and maintained by your Jira admins.

For teams who want to work with other teams across many projects in a standard way. Encourage and promote organizational best practices and processes through a shared configuration.

[Select a company-managed project](#)

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

Add project details

You can change these details anytime in your project settings.

Name *

Try a team name, project goal, milestone...

Access Anyone with access to born.skurowski can access and administer this project. [Upgrade your plan](#) to customize project permissions.

Key ⓘ*

Connect repositories, documents, and more

Sync your team's work from other tools with this project for better visibility, access, and automation.

Template	Change template
 Scrum Sprint toward your project goals with a board, backlog, and roadmap.	
Type	Change type
 Team-managed Control your own working processes and practices in a self-contained space.	

Create project

Creating a Project



A screenshot of the Jira Software interface. At the top, there's a navigation bar with icons for boards, filters, your work, projects (which is highlighted in blue), filters, dashboards, people, apps, and a create button. To the right of the create button is a search bar and some additional icons. The main area shows a project titled "Jira Training 2" under "Jira Training 2". Below the title is a sidebar with sections for "PLANNING" (Roadmap, Backlog, Board - which is selected and highlighted in blue), "DEVELOPMENT" (Code, Project pages, Add shortcut, Project settings), and a note that the user is in a team-managed project. The main workspace is titled "JT2 board" and contains three columns: "TO DO" (with a "Quickstart" button), "IN PROGRESS", and "DONE". A message in the TO DO column says "You haven't started a sprint" and provides instructions to go to the backlog to plan and start a sprint. There's also a "Go to Backlog" button.

The Board will appear on the screen. You can see 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.

The image shows the Jira interface for managing a project. On the left, a sidebar lists project management sections: PLANNING (Roadmap, Backlog), DEVELOPMENT (Code), and a highlighted section for BOARD. At the bottom of the sidebar is a 'Project settings' link. To the right, a detailed configuration screen is displayed for the project 'Jira Training 2'. The screen includes fields for Name (Jira Training 2), Key (JT2), Category (Choose a category), and a prominent 'Project lead' section. The 'Select Lead name' input field in this section is highlighted with a red border. A large orange arrow points from the 'Project settings' link in the sidebar towards this highlighted field. Below the lead selection, a note says 'Make sure your project lead has access to issues in the project.' Other settings shown include 'Default assignee' set to 'Unassigned' and a 'Save' button.

Jira Training 2
Software project

PLANNING

- Roadmap
- Backlog
- Board

DEVELOPMENT

- Code

Project pages

Add shortcut

Project settings

Name: Jira Training 2

Key: JT2

Category: Choose a category

Project lead

Select Lead name

Make sure your project lead has access to issues in the project.

Default assignee: Unassigned

Save

Adding Access

Jira Training 2
Software project

Back to project

Details

Access

Notifications

Automation

Issue types

Features

Projects / Jira Training 2 / Project settings

Access

Project access

Anyone with access to the "bonniekurowski" site can access and administer this project. [Upgrade your plan](#) to customize this project's permissions. [Learn more about plans](#)

Add people Manage roles

Search for names, groups or email addresses Roles

Name	Email	Role
BK	...	Administrator

- Choose Access
- Add people

Choosing Project Features

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

The Project is now open!

Jira Training 2
Software project

Back to project

Details

Access

Notifications

Automation

Issue types

Features

Roadmap

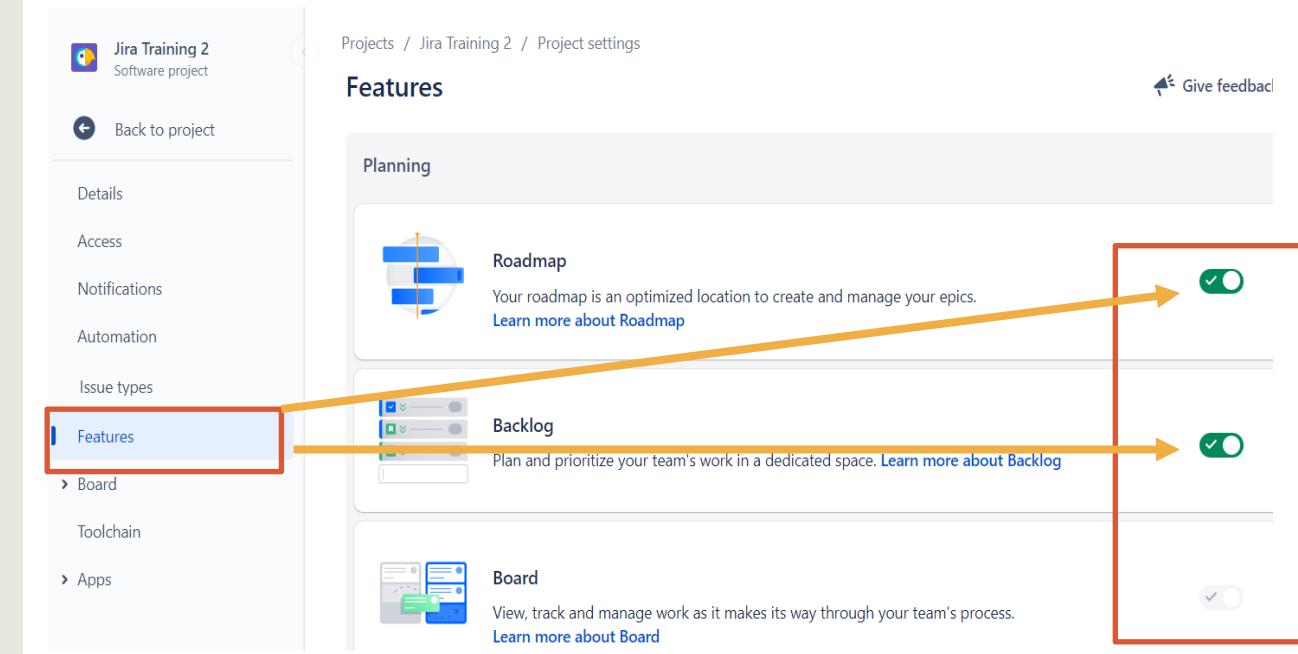
Your roadmap is an optimized location to create and manage your epics.
[Learn more about Roadmap](#)

Backlog

Plan and prioritize your team's work in a dedicated space.
[Learn more about Backlog](#)

Board

View, track and manage work as it makes its way through your team's process.
[Learn more about Board](#)



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.

The image shows the Jira navigation bar on the left and the 'Permission schemes' page on the right. A yellow arrow points from the 'Issues' link in the navigation bar to the 'Permission schemes' section on the right. Another yellow arrow points from the 'Permission schemes' section back to the 'Permission schemes' link in the navigation bar.

The Jira navigation bar includes links for User management, Billing, System, Products, Projects, Issues (which is highlighted with a red box), and Apps. The 'Issues' link is described as 'Configure your issue types, workflows, screens, custom fields and more.' The 'Permission schemes' link is described as 'Manage permission schemes for your Jira instance.'

The 'Permission schemes' page lists several sections under 'ISSUE ATTRIBUTES': Statuses, Resolutions, Priorities, Issue security schemes, and Notification schemes. The 'Permission schemes' link is also present at the bottom of this list.

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

Editing

Issues

Permission schemes

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 <small>This is the default Permission Scheme. Any new projects that are created will be assigned this scheme.</small>	<ul style="list-style-type: none">• Demo service project	Permissions Copy Edit Permissions Delete Permissions Copy Edit
Jira Service Management Permission Scheme for Project DESK <small>This Jira Service Management Permission Scheme was generated for Project DESK</small>	<ul style="list-style-type: none">• Jira Training	Permissions Delete Permissions Copy Edit
JT software permission scheme <small>The permission scheme for Jira Software Free. In Free, any registered user can access and administer this project.</small>		

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	Update	Remove
Assignable User Users with this permission may be assigned to issues.	Project Role <ul style="list-style-type: none">atlassian-addons-project-access	Update	Remove
Assign Issues Ability to assign issues to other people.	Any logged in user Project Role <ul style="list-style-type: none">atlassian-addons-project-access	Update	Remove
Close Issues Ability to close issues. Often useful where your developers resolve issues, and a QA department closes them.	Any logged in user Project Role <ul style="list-style-type: none">atlassian-addons-project-access	Update	Remove

Look, there is
where I can update
my users! Thanks!



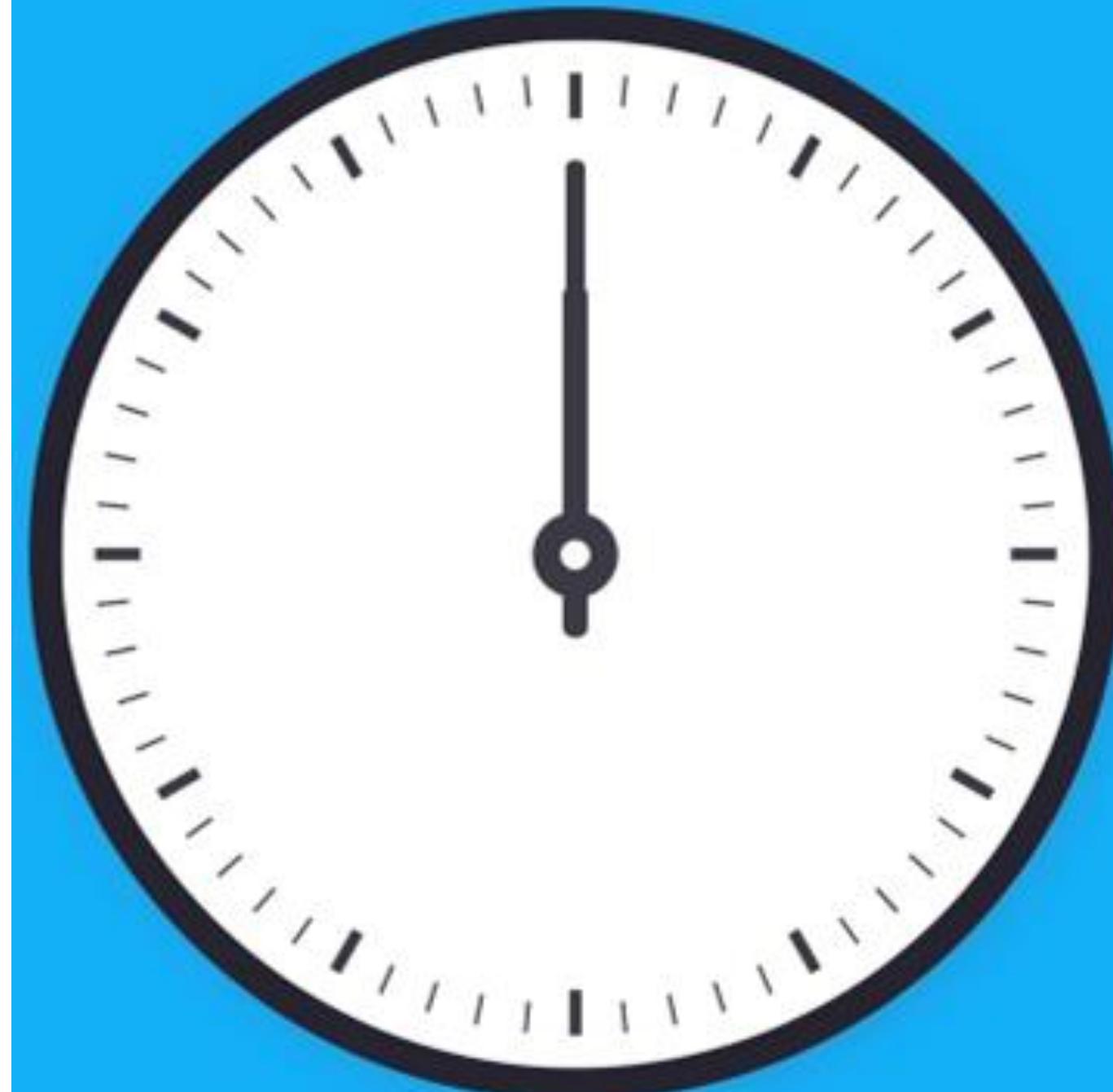
Granting user permissions

- 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

The screenshot shows the Jira Settings page. At the top, there is a navigation bar with a search bar and several icons. Below the navigation bar, there are several sections: "JIRA SETTINGS" containing "System", "Products", "Projects", and "Issues". The "Issues" section is highlighted with a red box and an orange arrow points to it. Below "JIRA SETTINGS" is a section titled "PERSONAL SETTINGS" with "Atlassian account settings" and "Personal Jira settings". To the right of the main content area, there is a sidebar with various links: "Issues", "Field configuration schemes", "FORMS", "Data connections", "ISSUE FEATURES", "Time tracking", "Issue linking", "ISSUE ATTRIBUTES", "Statuses", "Resolutions", "Priorities", "Issue security schemes", "Notification schemes", and "Permission schemes", which is also highlighted with a red box.

Adding a Permission Scheme

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

Issues

Search Jira admin

Permission schemes

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](#)

Issues

Add permission scheme

Name*

Description

Add

Cancel

Adding permission schemes to projects

The screenshot shows the Jira interface with three numbered steps:

- Step 1:** A red box highlights the Jira icon in the top-left corner of the header.
- Step 2:** A red box highlights the "Projects" dropdown menu in the top navigation bar. A red circle with the number "2" is placed over the dropdown button.
- Step 3:** A red box highlights the "Project settings" link in the sidebar of a project page. A red circle with the number "3" is placed over the sidebar area. An orange arrow points from the "Permissions" link in the sidebar down to the "Permissions" link at the bottom of the page.

The main content area shows the "Projects" page with a list of recent projects:

- Jira Training 2 (JT2) Software project
- Demo service project (DESK) Service project
- Jira Training (JT) Software project
- Jira Training (JT) Software project

Below the list are "View all projects" and "Create project" buttons.

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

The screenshot shows the Jira Settings interface. At the top, there's a navigation bar with 'More', a '+' button, a search bar, and other icons. Below this, there are several sections: 'JIRA SETTINGS' containing 'System', 'Products', 'Projects', and 'Issues'. The 'Issues' section is highlighted with a red box and an orange arrow points to its title. Below 'JIRA SETTINGS' is a 'PERSONAL SETTINGS' section with 'Atlassian account settings' and 'Personal Jira settings'. To the right of the main content area, there's a sidebar with a tree view of Jira features: 'Issues', 'Field configuration schemes', 'FORMS', 'Data connections', 'ISSUE FEATURES', 'Time tracking', 'Issue linking', 'ISSUE ATTRIBUTES', 'Statuses', 'Resolutions', 'Priorities', 'Issue security schemes', 'Notification schemes', and 'Permission schemes', which is also highlighted with a red box.

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.

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

Issues Search Jira admir

[Edit Permission Scheme: Default Permission Scheme](#)

Name

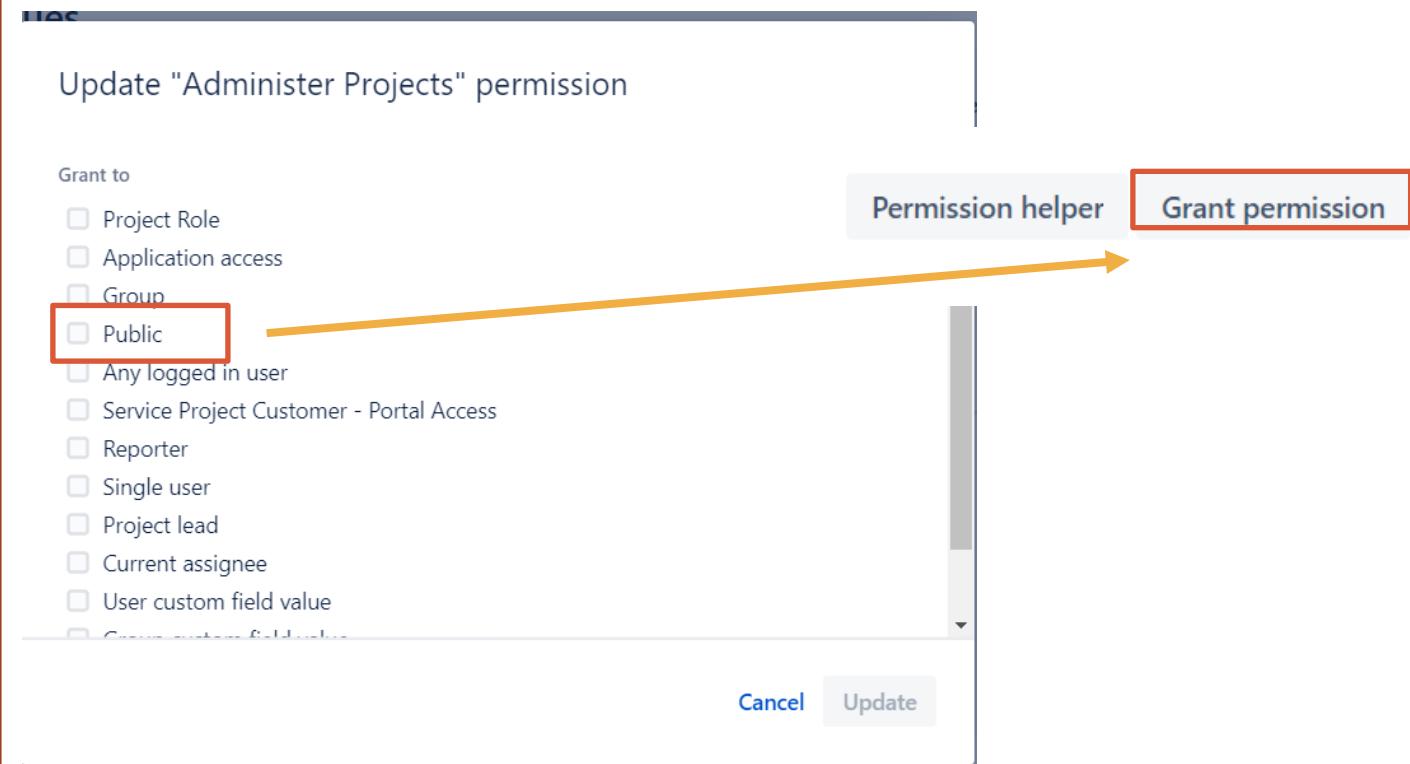
Description

[Update](#) [Cancel](#)

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.

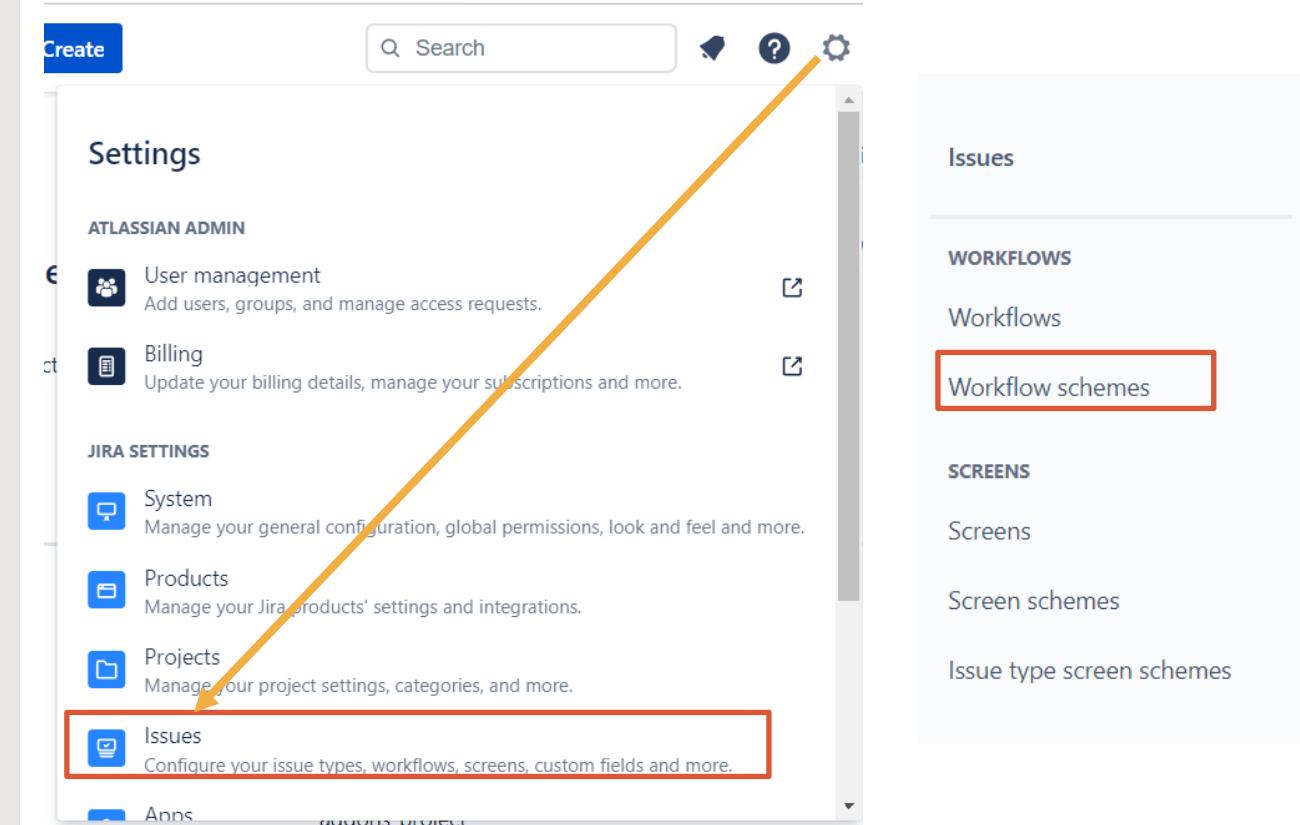
Let's help Sam.



Accessing Workflows

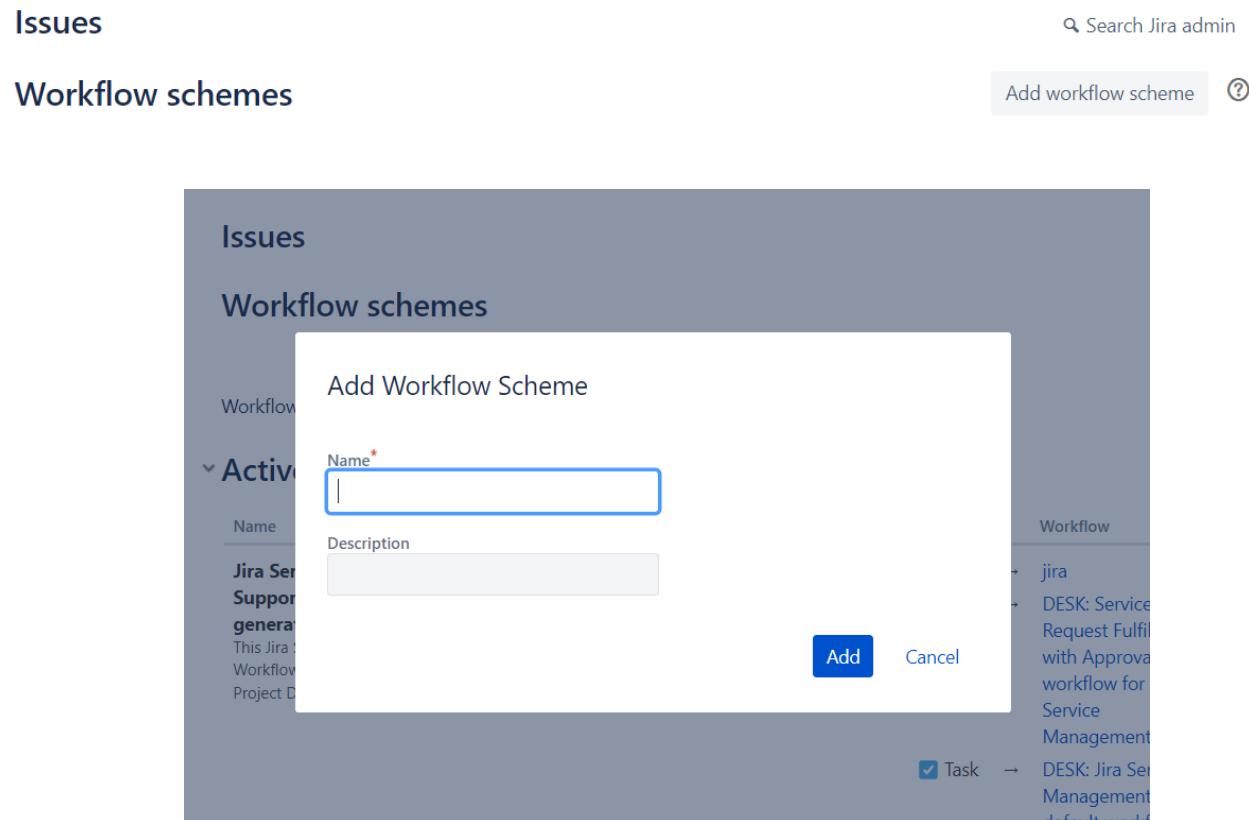
In order to associate workflows with specific issue types, you can create workflow schemes.

- 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.

Workflow Schemes allow you to define which workflows apply to given issue types and projects.

Active

Name	Projects	Issue Type	Workflow	Actions
Jira Service Management IT Support Workflow Scheme generated for Project DESK This Jira Service Management IT Support Workflow Scheme was generated for Project DESK	• Demo service project	<input type="checkbox"/> Unassigned Types <input checked="" type="checkbox"/> Service Request with Approvals	→ jira → DESK: Service Request Fulfilment with Approvals workflow for Jira Service	Edit Copy

Jira Service Management IT Support Workflow Scheme generated for Project DESK...

SHARED BY 1 PROJECT

This Jira Service Management IT Support Workflow Scheme was generated for Project DESK

Add Workflow ▾

Workflow Issue Types Actions

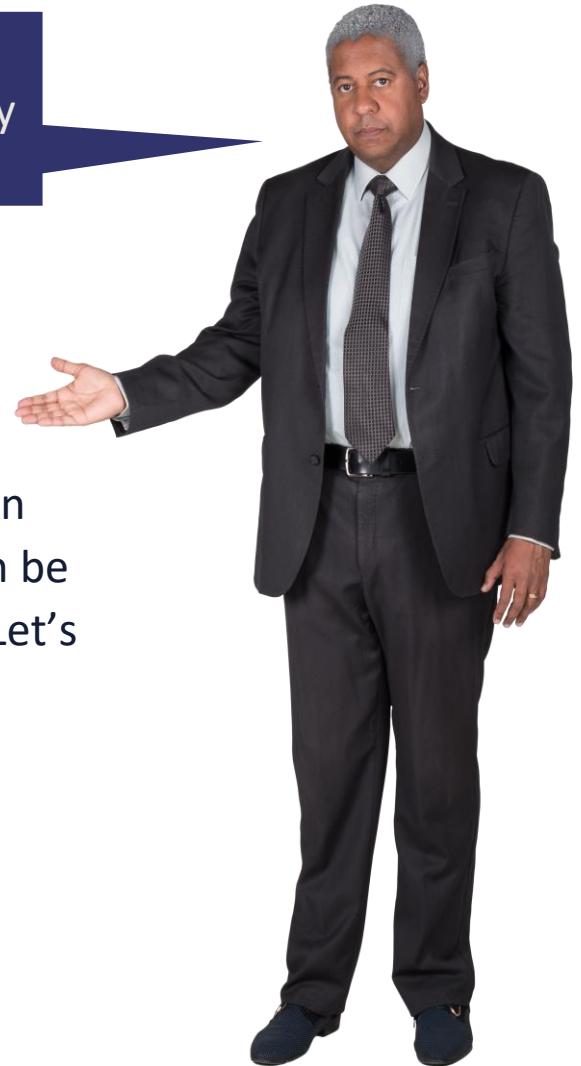
Jira Workflow (jira) View as: [Text](#) [Diagram](#) All Unassigned Issue Types [Assign](#) [Remove](#)

The default Jira workflow.

Configuring Attachments



I am creating an issue. Can I add my attachment?



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

Settings

ATLASSIAN ADMIN



User management

Add users, groups, and manage access requests.



Billing

Update your billing details, manage your subscriptions and more.



JIRA SETTINGS



System

Manage your general configuration, global permissions, look and feel and more.

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

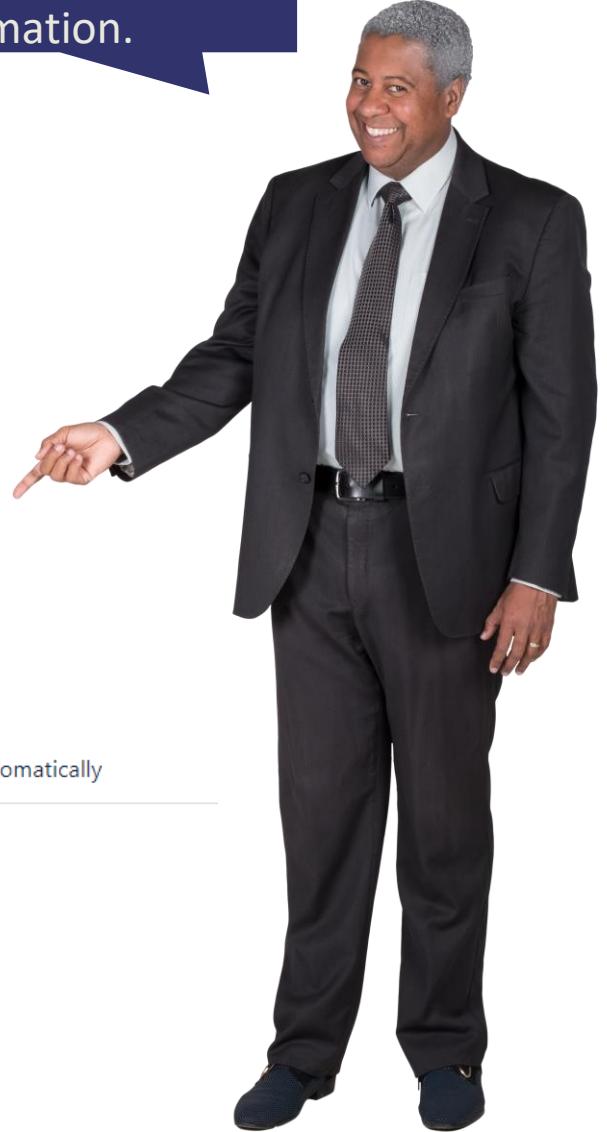
Now attach!

The screenshot shows the Jira Admin System settings page. At the top right are search and navigation icons. Below them are tabs for 'System' and 'Settings'. On the far right are 'Advanced Settings' and 'Edit Settings' buttons, with 'Edit Settings' highlighted by a red border. The main content area has a heading 'Sharing for dashboards and filters that are already shared with the public.' Below it are two input fields: 'Maximum project name size' set to 80, with a note 'The minimum length is 2. 80 is recommended. Changing this length will not impact the currently existing project names.' and 'Maximum project key size' set to 10, with a note 'The minimum length is 2. 10 is recommended. Changing this length will not impact the currently existing project keys.'

Updating

Click Update

Attachments will save me
a lot of time from having
to enter all that
information.



Enables inline editing of issues

Auto-update search results ON OFF

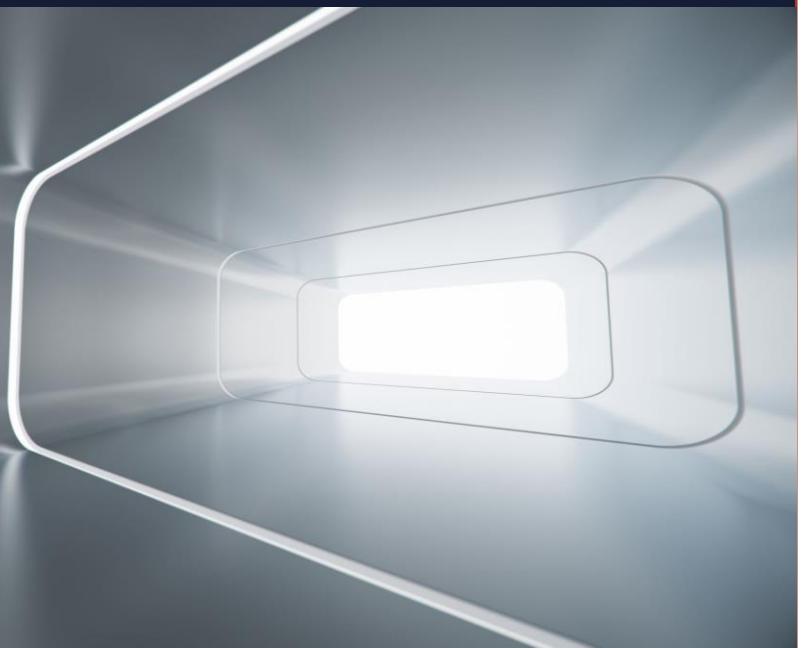
Turn on to update search results automatically

Update

Cancel

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

The screenshot shows the 'Settings' section of the Atlassian Admin interface. It is organized into two main sections: 'ATLASSIAN ADMIN' and 'JIRA SETTINGS'. Under 'ATLASSIAN ADMIN', there are two items: 'User management' (Add users, groups, and manage access requests) and 'Billing' (Update your billing details, manage your subscriptions and more). Under 'JIRA SETTINGS', there is one item: 'System' (Manage your general configuration, global permissions, look and feel and more). A red box highlights the 'System' item under 'JIRA SETTINGS'. Below this, a secondary navigation panel titled 'System' shows a single item: 'General configuration', which is also highlighted with a red box.

- Select Jira Setting
- Select System
- Click General Configuration

Customizing Your Internationalization Settings

- Internationalization
- Modify the language preferences

You can include Wiki markup.

Internationalization

Indexing language Please select the language that issues are entered in, if multiple languages are used select 'Other'.

Installed languages Chinese (China), Chinese (Taiwan), Czech (Czechia), Danish (Denmark), Dutch (Netherlands), English (United Kingdom), English (United States), Estonian (Estonia), Finnish (Finland), French (France), German (Germany), Hungarian (Hungary), Icelandic (Iceland), Italian (Italy), Japanese (Japan), Korean (South Korea), Norwegian (Norway), Polish (Poland), Portuguese (Brazil), Portuguese (Portugal), Romanian (Romania), Russian (Russia), Slovak (Slovakia), Spanish (Spain), Swedish (Sweden), Turkish (Turkey), Vietnamese (Vietnam)
To install a new language, you need to add a new language bundle and then restart Jira for the new language(s) to be picked up. [\(?\)](#)

Default language This feature is currently in development. [Learn More](#). Determines the language which Jira is displayed in. Only installed languages are shown in this list.

Default user time zone Region Time Zone Determines the default time zone used when displaying time and date information. Users can override the default time zone and use a different time zone than this global default.

Adjusting Regional Settings

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

You have now changed the regional settings.

You can include Wiki markup.

Internationalization

Indexing language

Please select the language that issues are entered in, if multiple languages are used select 'Other'.

Installed languages Chinese (China), Chinese (Taiwan), Czech (Czechia), Danish (Denmark), Dutch (Netherlands), English (United Kingdom), English (United States), Estonian (Estonia), Finnish (Finland), French (France), German (Germany), Hungarian (Hungary), Icelandic (Iceland), Italian (Italy), Japanese (Japan), Korean (South Korea), Norwegian (Norway), Polish (Poland), Portuguese (Brazil), Portuguese (Portugal), Romanian (Romania), Russian (Russia), Slovak (Slovakia), Spanish (Spain), Swedish (Sweden), Turkish (Turkey), Vietnamese (Vietnam)

To install a new language, you need to add a new language bundle and then restart Jira for the new language(s) to be picked up. [?](#)

Default language

This feature is currently in development. [Learn More](#). Determines the language which Jira is displayed in. Only installed languages are shown in this list.

Default user time zone Region Time Zone

Determines the default time zone used when displaying time and date information. Users can override the default time zone and use a different time zone than this global default.



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

Jira projects contain boards such as SCRUM and Kanban. These boards can be customized and configured to meet your project's 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.

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



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**



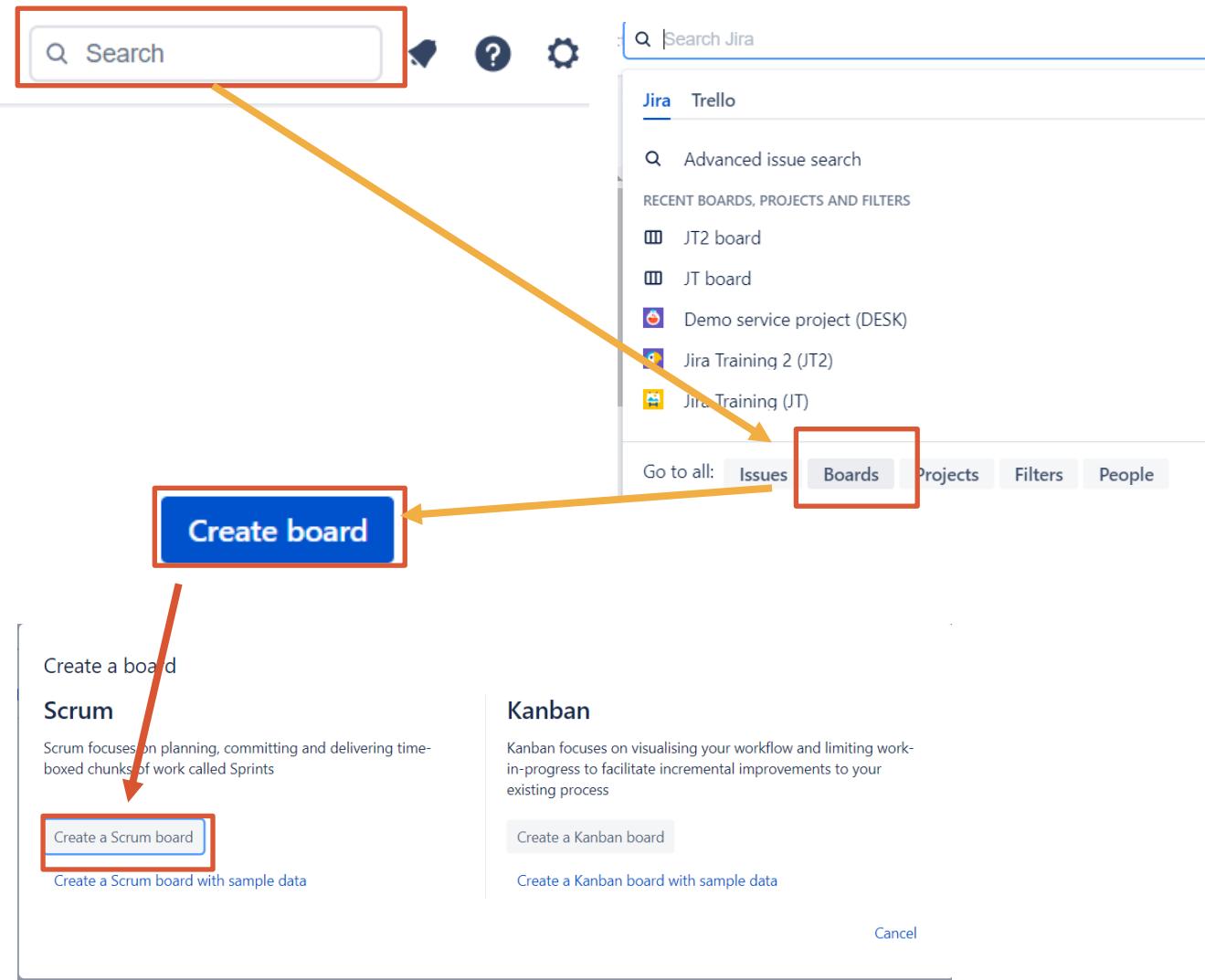


Creating a SCRUM Board

Jira enables you to quickly create scrum boards to add 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

The screenshot shows the Jira Training 2 board interface. On the left, a sidebar menu includes options like Roadmap, Backlog, and Board (which is selected). The main area is titled "JT2 board". It features three columns: "TO DO", "IN PROGRESS", and "DONE". The "TO DO" column contains a message: "You haven't started a sprint. You can't do anything on your board because you haven't started a sprint yet. Go to the backlog to plan and start a sprint." Below this message is a "Go to Backlog" button. The "IN PROGRESS" and "DONE" columns are currently empty.

Interface

Exploring the board interface

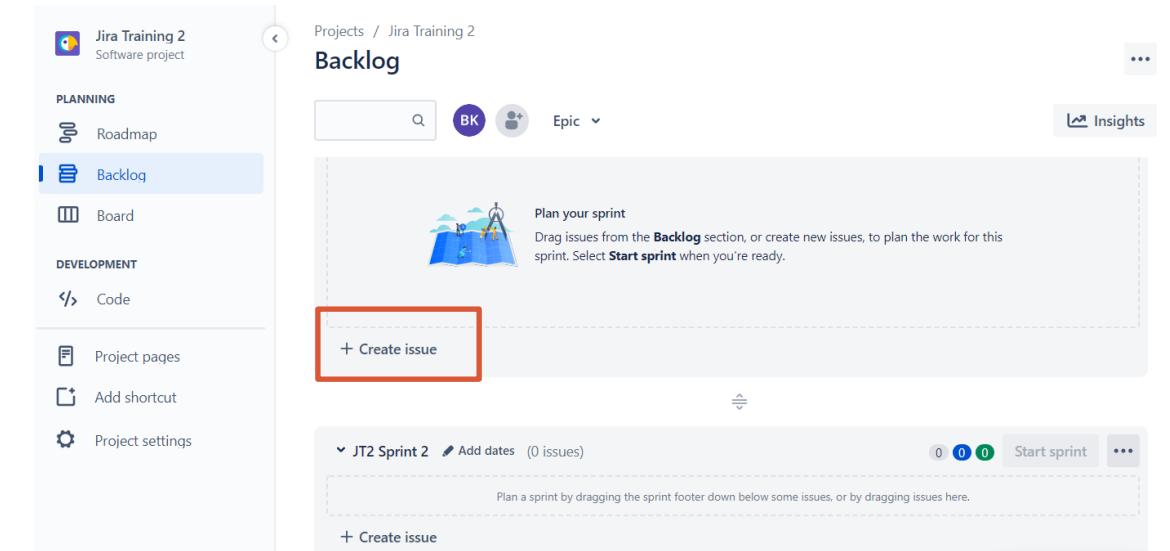
- Click **Create Sprint**

The screenshot shows the Jira Backlog interface for the project 'Jira Training 2'. On the left, a sidebar menu includes options like 'Roadmap', 'Backlog' (which is selected and highlighted in blue), 'Board', 'Code', 'Project pages', 'Add shortcut', and 'Project settings'. The main area is titled 'Backlog' and shows a section for 'JT2 Sprint 1' with '(0 issues)'. Below this, there's a 'Plan your sprint' section with a placeholder for dragging issues from the backlog. At the bottom right of the main area, a button labeled 'Create sprint' is highlighted with a red box.

Interface

Exploring the board interface

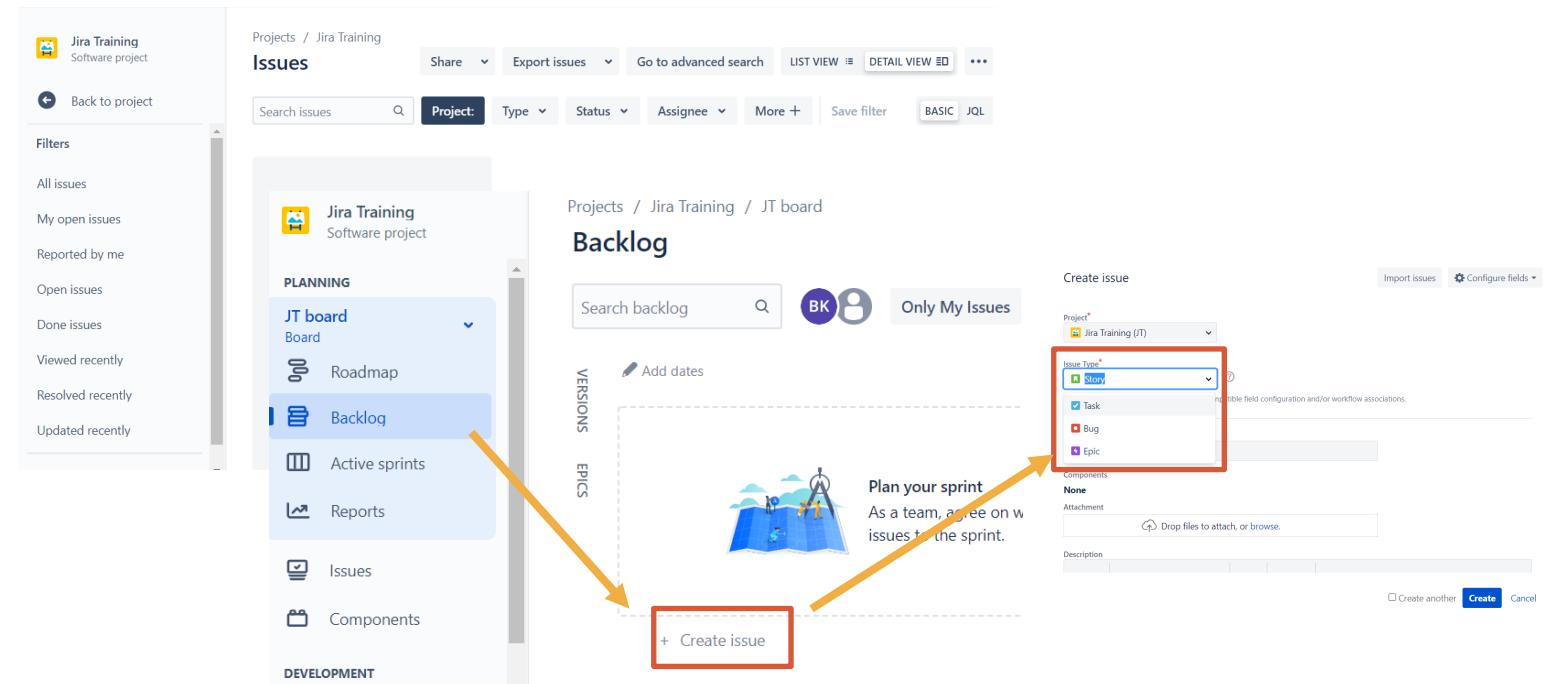
- Click **Create Issue**



Adding Issues

Adding issues to the board

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



Editing Sprints

The screenshot shows a software interface for managing sprints. At the top, there's a navigation bar with a star icon, 'Complete sprint' button, 'Share' button, and a three-dot menu. Below the navigation is a search bar labeled 'Search backlog' with a magnifying glass icon, and user filters 'Only My Issues' and 'Recently Updated'. To the right is an 'Insights' button.

On the left, vertical navigation tabs are visible: 'Backlog' (selected), 'VERSIONS', and 'EPICS'. The main area is titled 'Plan your sprint' with a sub-instruction: 'As a team, agree on what work needs to be completed, and drag these issues to the sprint.' It features a blue map icon with figures on it. A large orange arrow points upwards from the 'Backlog' section towards the 'Sprint' section above. The 'Backlog' section contains a '+ Create issue' button. At the bottom, it says 'Backlog 0 issues' and includes 'Create sprint' and three-dot buttons.

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

Projects / Jira Training / JT board

Backlog

The screenshot shows the Jira Backlog interface. On the left, there are navigation links for 'VERSIONS' and 'EPICS'. The main area displays a backlog item for 'JT Sprint 1' which contains one issue, 'JT-1'. A blue button labeled 'Start sprint' is visible. Below the backlog items, a modal dialog is open for starting a new sprint. The dialog fields are as follows:

- Sprint name: JT Sprint 1
- Duration: Custom
- Start date: 19/Jul/22 01:30 AM
- End date: 02/Aug/22 1:31 AM
- Sprint goal: (empty field)

An orange arrow points from the text 'Start sprint' in the backlog to the 'Start sprint' button in the dialog. A yellow warning icon is present in the dialog, indicating that the 'Estimate' field for JT-1 has not been filled.

Editing sprints in a scrum board

- Edit fields you need to change

Editing Sprints

The screenshot shows a Jira Scrum board titled "JT Sprint 1". The board has two columns: "TO DO" and "IN PROGRESS". A card titled "training" is in the "TO DO" column. A context menu is open over this card, with the "Delete" option highlighted and surrounded by a red box.

Left sidebar (Planning section):

- Jira Training Software project
- Planning
 - JT board Board
 - Roadmap
 - Backlog
 - Active sprints (highlighted)
 - Reports
- Issues
- Components

Right sidebar (Development section):

- Code
- Releases

You're in a company-managed project

Editing sprints in a scrum board

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

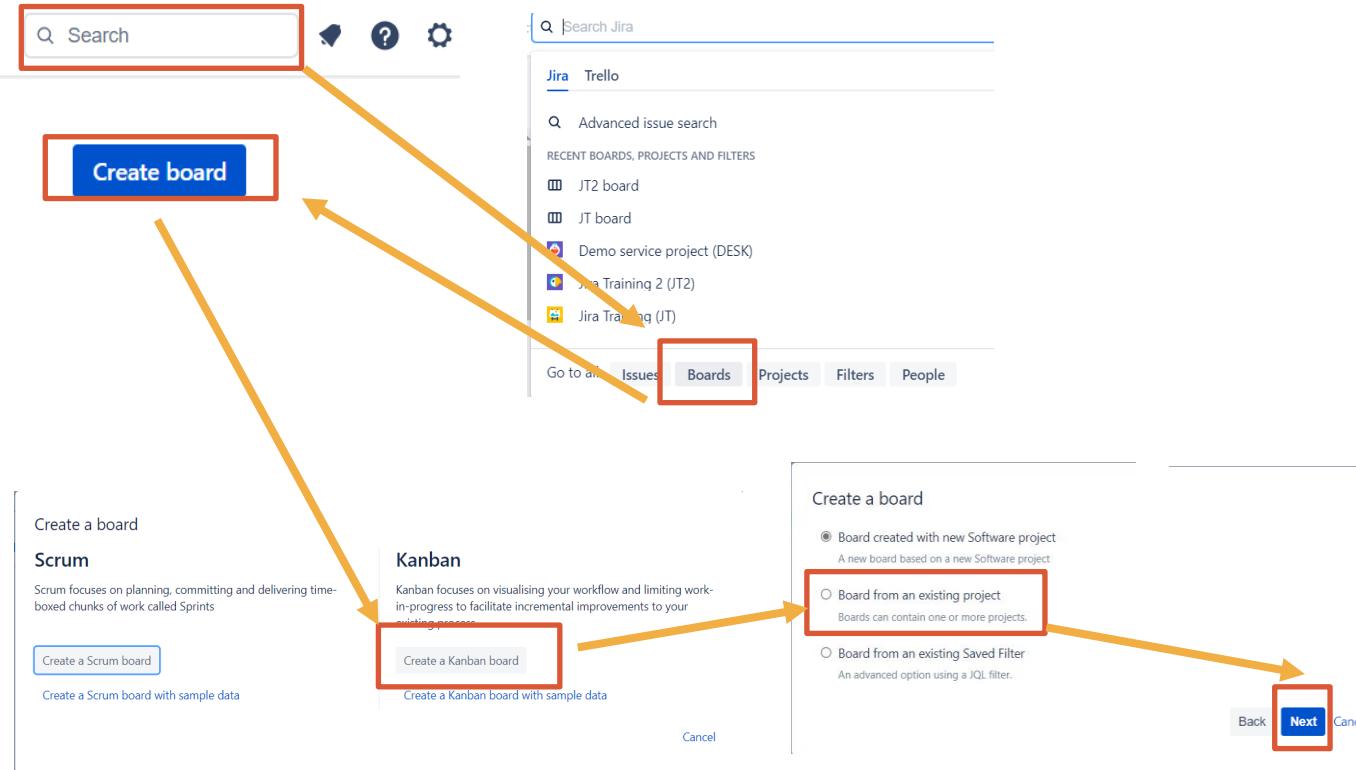


Creating a Kanban Board

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

Exploring the board interface

- Explore the issues presented in the Kanban board

The screenshot shows the Jira Kanban board interface. At the top left is the project navigation bar: Jira Training > Software project > Training on Jira. On the right are various project management icons: a lightning bolt, a star, a release dropdown, and a three-dot menu.

The main area is titled "Kanban board". It features a search bar and filters for "Only My Issues" and "Recently Updated". The board is divided into three columns: "TO DO 1", "IN PROGRESS 5", and "DONE 1".

- TO DO 1:** Contains one card: "Collecting custom request details" (status: DESK-4).
- IN PROGRESS 5:** Contains five cards:
 - "What is a request?" (status: DESK-1)
 - "Capturing customer email requests" (status: DESK-2)
 - "Agents & customers" (status: DESK-3)
 - "Linking requests to a Jira Software issue" (status: DESK-6)
 - "Automatically update linked requests" (status: DESK-7)
- DONE 1:** Contains one card: "I need help connecting my laptop to the level 3 printer" (status: DESK-5).

A message at the bottom right says, "We're only showing recently modified issues." Below it is a "Quickstart" button with a lightbulb icon and a close button.

Interface

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

The screenshot shows the Jira interface for the 'Jira Training' project. The left sidebar has sections for PLANNING (JT board, Roadmap, Backlog, Active sprints, Reports, Issues, Components) and DEVELOPMENT. The 'Backlog' item is selected and highlighted in blue. The main area shows the 'Backlog' view for the 'JT board'. A search bar at the top says 'Search backlog' with a magnifying glass icon. To the right of the search bar are 'BK' initials and a user profile icon, followed by 'Only My Issues'. Below the search bar is a button labeled 'Add dates'. On the left, there are tabs for VERSIONS and EPICS. The central part of the screen displays a 'Create issue' dialog box. The 'Project' dropdown is set to 'Jira Training (JT)'. The 'Issue Type' dropdown is set to 'Story' (which is also selected). Other options in the 'Issue Type' dropdown include 'Task', 'Bug', and 'Epic'. Below the dropdowns are fields for 'Components' (set to 'None') and 'Attachment' (with a placeholder 'Drop files to attach, or browse...'). At the bottom of the dialog are 'Description' fields, a checkbox for 'Create another', and a prominent blue 'Create' button. An orange arrow points from the text 'Click Create' in the adjacent column to the 'Create' button.

Adding issues to the board

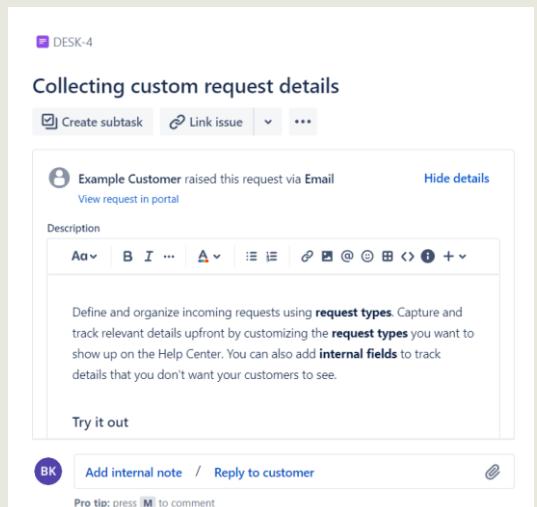
- Choose - Story/task/bug
- Add notes
- Click **Create**

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.



Kanban board

The screenshot shows a Jira Kanban board with the following columns and items:

- TO DO 1**: One item: 'Collecting custom request details' (status: In Progress, assigned to DESK-4).
- IN PROGRESS 5**: Five items:
 - 'What is a request?' (status: To Do, assigned to DESK-1)
 - 'Capturing customer email requests' (status: To Do, assigned to DESK-2)
 - 'Agents & customers' (status: To Do, assigned to DESK-3)
 - 'Linking requests to a Jira Software issue' (status: To Do, assigned to DESK-6)
 - 'Automatically update linked requests' (status: To Do, assigned to DESK-7)

At the top of the board are search, filter ('BK 8'), and navigation buttons ('Only My Issues', 'Recently Updated').

Creating an Issue

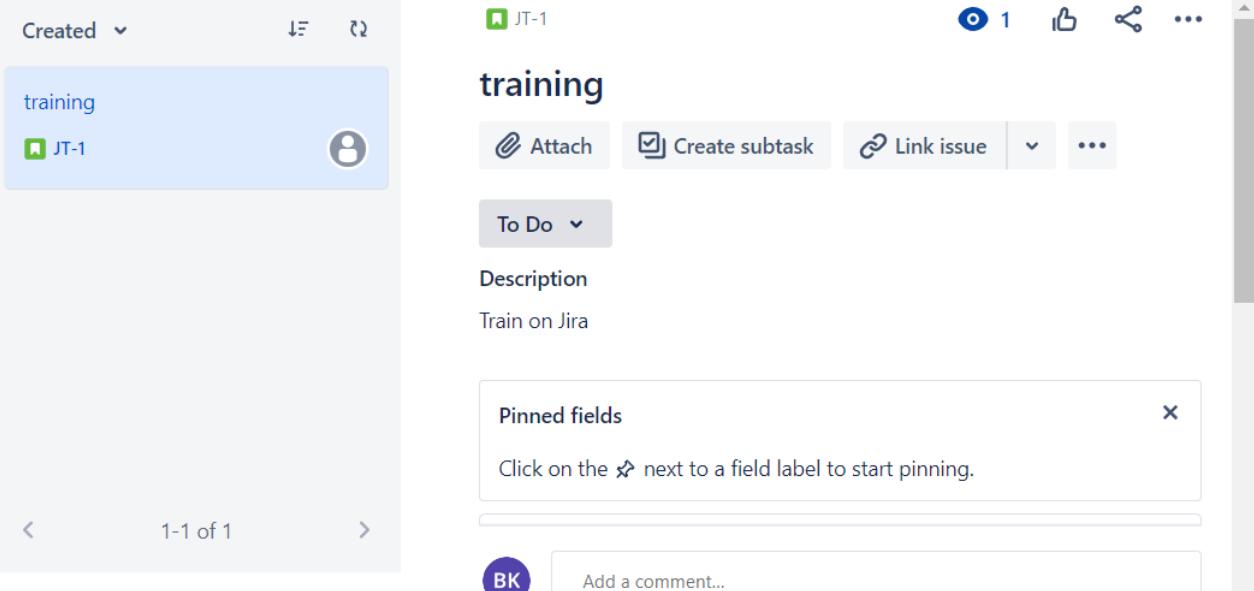
Projects / Jira Training

Issues

Share Export issues Go to advanced search LIST VIEW DETAIL VIEW ...

Search issues Project: Jira Training Type Status Assignee More + BASIC JQL Save filter

Created training JT-1 1 To Do Description Train on Jira Pinned fields Click on the next to a field label to start pinning. Add a comment... BK



- 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

The screenshot illustrates the Jira interface for adding subtasks. At the top, a modal window titled "Subtasks" is open, showing a list of existing subtasks: "JT-2 Classroom Activities" (status: TO DO). Below this is a text input field labeled "What needs to be done?" and buttons for "Create" and "Cancel". Above the modal, the main Jira interface shows a project board with one issue titled "training" (status: To Do). The "Create subtask" button, located in the issue details panel, is highlighted with a red box. The board view shows the issue "training" with its subtask "JT-1". The Jira header includes navigation links like "Projects / Jira Training", "Issues", and "Share", along with search and filter options.

Editing Issues

DESK-4

The screenshot shows the Jira issue editing interface for ticket DESK-4. At the top, there's a note from an 'Example Customer' raised via Email, with a 'View request in portal' link. Below it is a 'Description' section with rich text editor tools. A red box highlights a note about defining request types and capturing relevant details. Under 'Try it out', another note says we've given some request types to try, mentioning Channels and Back to project. The main editing area has tabs for 'Add internal note' and 'Reply to customer'. It includes 'Save' and 'Cancel' buttons, approver fields (None), and a 'Subtasks' section. A red box highlights a subtask titled 'Jira Training' with an edit summary button. The subtask description is 'What needs to be done?'.

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



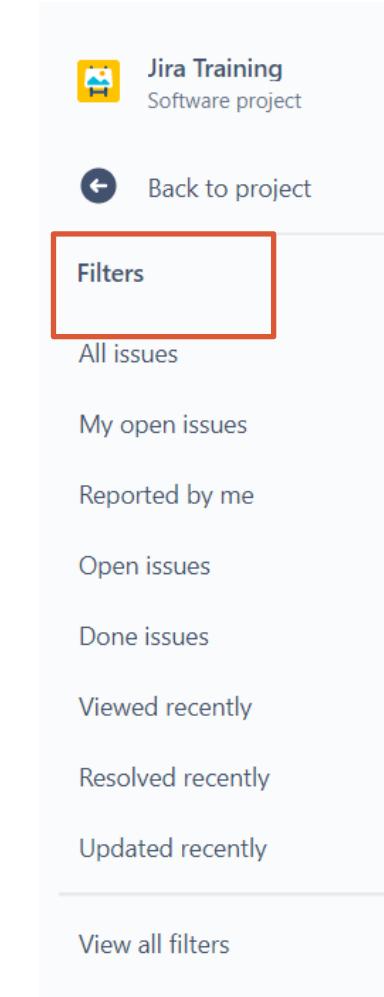
Managing Issues

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.

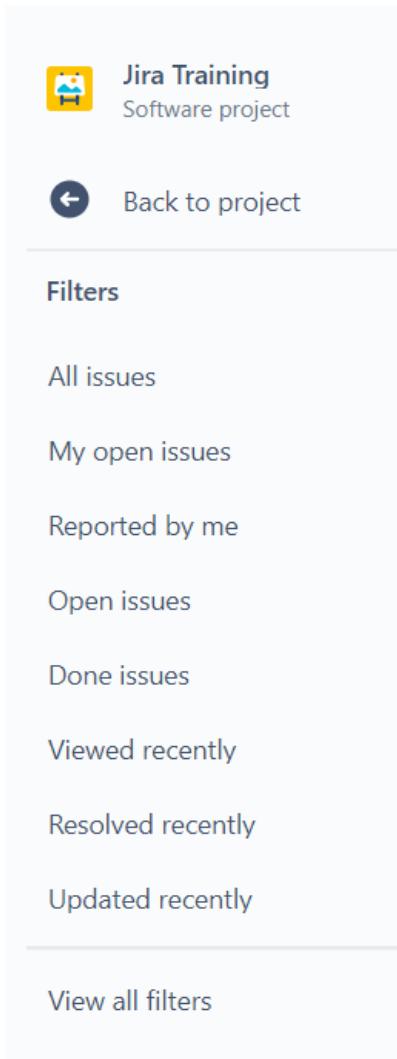
Viewing all Issues

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



This screenshot shows the Jira 'Issues' page for the 'Jira Training' project. The top navigation bar includes 'Projects / Jira Training', a 'Share' dropdown, a search bar, and a 'Project: Jira' dropdown. The main content area shows a list of issues with a blue header bar containing the text 'Created' and a dropdown arrow. One specific issue, 'training' (ID JT-1), is highlighted with a blue background and a user icon. The sidebar on the left is identical to the one in the previous screenshot, with 'All issues' highlighted.

Filtering Issues



The screenshot shows the Jira interface for the 'Jira Training' project. At the top, there's a yellow icon of a person at a desk and the text 'Jira Training Software project'. Below that is a 'Back to project' button with a left arrow icon. A horizontal line separates this from the 'Filters' section. The 'Filters' section contains several options: 'All issues', 'My open issues', 'Reported by me', 'Open issues', 'Done issues', 'Viewed recently', 'Resolved recently', and 'Updated recently'. Another horizontal line is below these, followed by the 'View all filters' link.

- 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.

The screenshot shows the Jira search interface. At the top is a search bar with the placeholder "Search Jira". Below it, there are two tabs: "Jira" (which is selected) and "Trello".
RECENTLY VIEWED ISSUES:

- JT-1 training (Jira Training, Recently viewed)
- DESK-4 Collecting custom request details (Demo service project, Recently viewed)

RECENT BOARDS, PROJECTS AND FILTERS:

- Training on Jira (Jira Training)
- JT board (Jira Training)
- JT2 board (Jira Training 2)
- Jira Training (JT)
- Jira Training 2 (JT2)
- Demo service project (DESK)

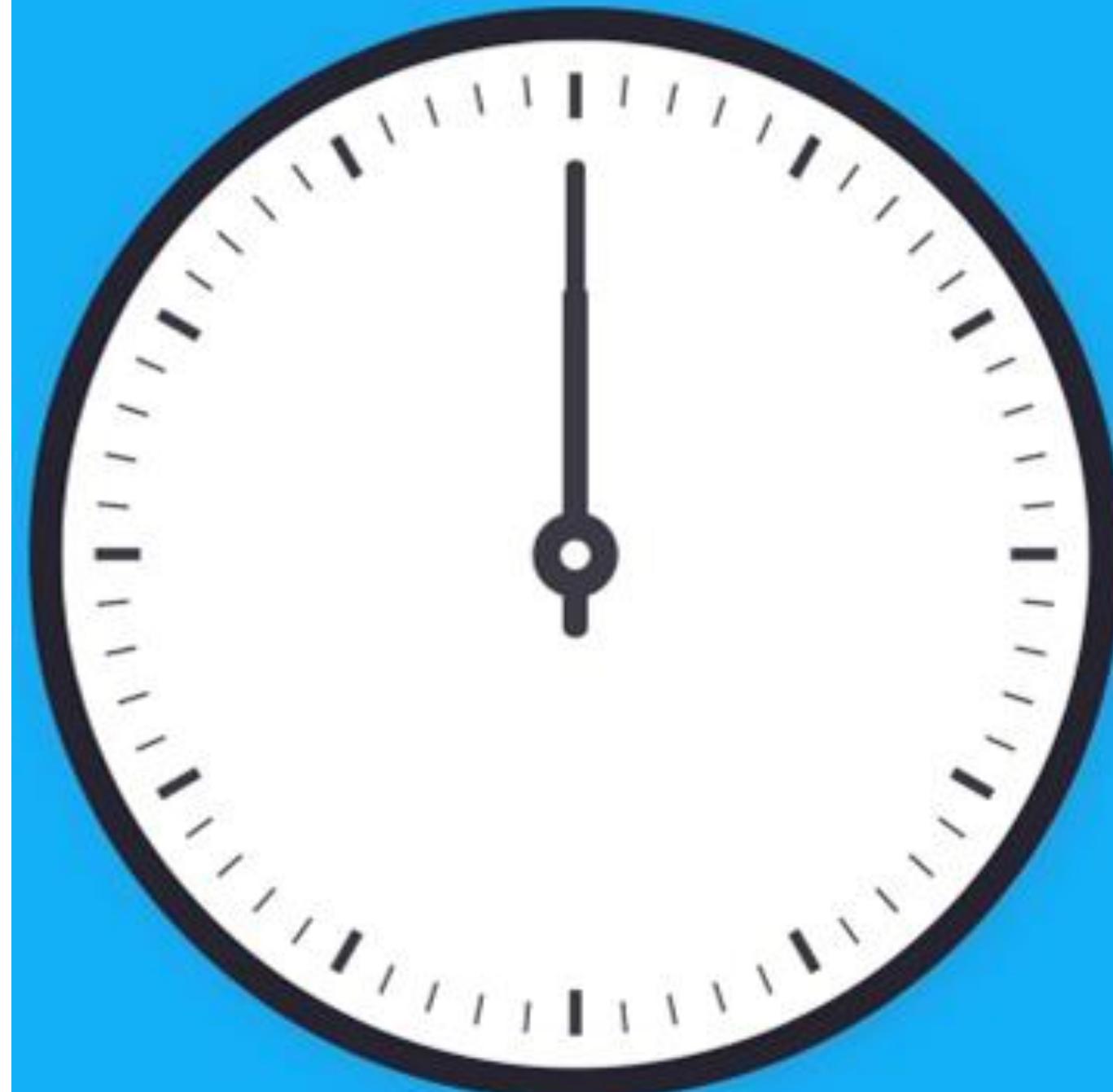
At the bottom of the interface, there is a navigation bar with links: "Go to all: Issues, Boards, Projects, Filters, People".

Project: ... ▾ Type: All ▾ Status: ... ▾ Assignee... ▾ + More Contains text **Search** Switch to JQL



Questions?

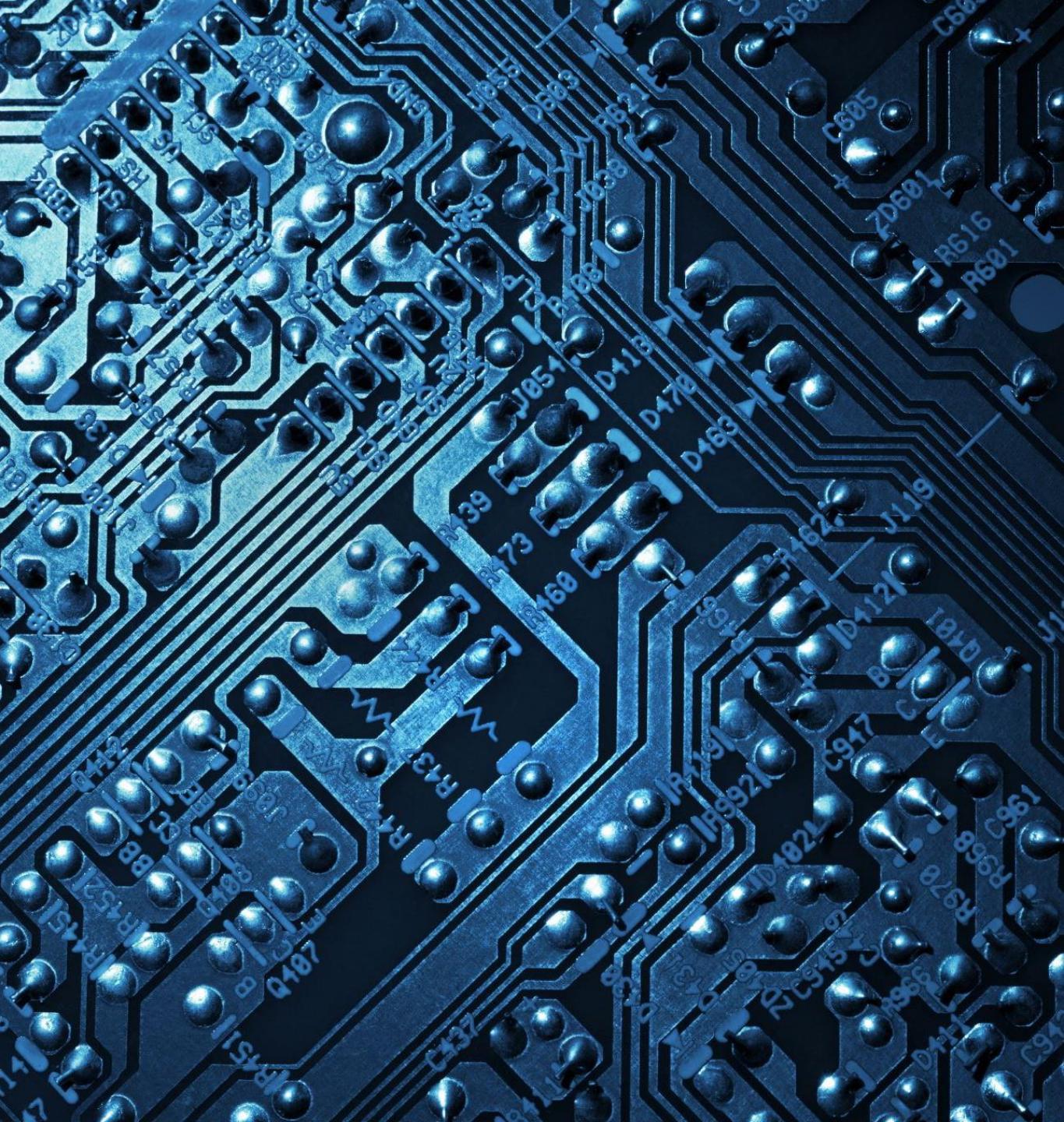
**Take a 10-minute
Break!**



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

Projects / Jira Training / Training on Jira

Kanban board

Search this board ...

BK Only My Issues Recently Updated

TO DO 2 IN PROGRESS 5 DONE 1

SETTINGS

General

Columns

Swimlanes

Quick Filters

Card colors

Card layout

Working days

Issue Detail View

Roadmap

Column management

Columns can be added, removed, reordered and renamed. Columns are based upon global statuses and can be moved between columns. Minimum and maximum constraints can be set for each mapped column.

Column Constraint

Constraints can be added to columns on the board for one statistic.

Simplified Workflow

Software Simplified Workflow unavailable

This board is unable to use a Software Simplified Workflow. ?

Add column

To Do

No Min No Max

Unmapped Stat...

Kanban backlog

WAITING FOR APPROVAL

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

Projects / Jira Training / Training on Jira

Settings for Training on Jira

◀ Back to board

SETTINGS

General

Columns

Swimlanes

Quick Filters

Card colors

Card layout

Working days

Issue Detail View

Roadmap

Card colors

Choose a method for assigning colors to your cards. If no method is selected, the cards will not have a colored edge. Any changes to the color configuration for a method are saved immediately, so you can switch back to it later if you wish.

[Learn more about card colors.](#)

Colors based on

Modifying the Card View

SETTINGS

General

Columns

Swimlanes

Quick Filters

Card colors

Card layout

Working days

Issue Detail View

Roadmap

Card layout

Cards can be configured to show up to three extra fields.

Kanban board

Field Name

[CHART] Date of First Response

Add

Days in column



Show a visual indicator on each card that represents the time spent in the column. This can help identify slow moving issues.

- 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 to your project board in Jira.

Accessing Board Filters

Projects / Jira Training / Training on Jira

Kanban board

Search this board Only My Issues Recently Updated

TO DO 2 IN PROGRESS 5 DONE 1 Hide menus

SETTINGS

- General
- Columns
- Swimlanes
- Quick Filters**
- Card colors
- Card layout
- Working days
- Issue Detail View
- Roadmap

Quick Filters

Quick Filters can be used to further filter the issues in the board based on the additional JQL query.

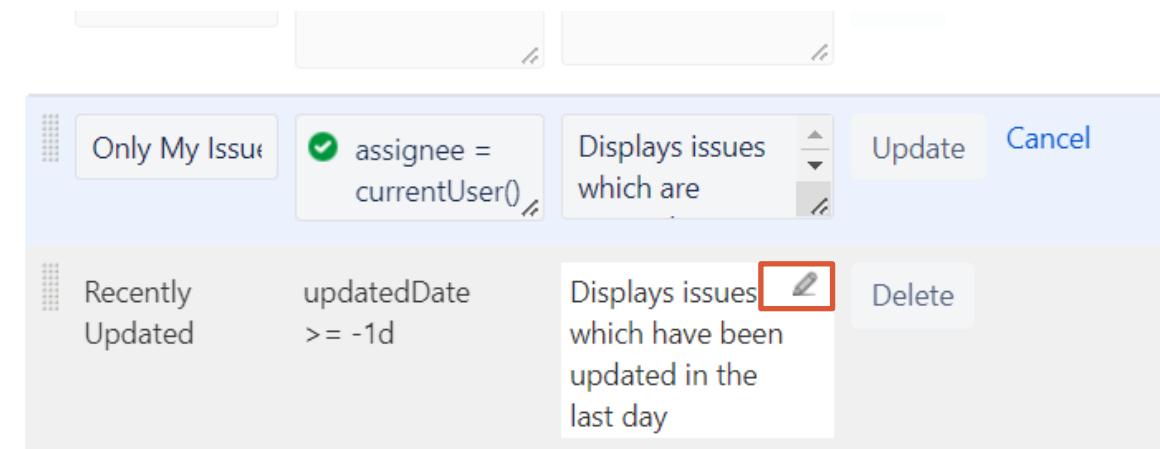
Name	JQL	Description	Action
Only My Issues	assignee = currentUser()	Displays issues which are currently assigned to the current user	Delete
Recently Updated	updatedDate >= -1d	Displays issues which have been updated in the last day	Delete

A screenshot of a Jira Kanban board interface. At the top, there's a navigation bar with 'Projects / Jira Training / Training on Jira'. Below it, the title 'Kanban board' is displayed. On the left, there's a sidebar with various settings options like General, Columns, and Quick Filters. The 'Quick Filters' option is highlighted with a red box. The main area shows a Kanban board with three columns: 'TO DO 2', 'IN PROGRESS 5', and 'DONE 1'. Above the board, there's a toolbar with icons for Release, star, share, and more. A dropdown menu is open from the 'More' icon, and the 'Board settings' option is highlighted with a red box and an orange arrow pointing to it. Below the board, there's a section titled 'Quick Filters' with a table showing two existing filters: 'Only My Issues' and 'Recently Updated'.

- 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

SETTINGS

General
Columns
Swimlanes

Quick Filters

Card colors
Card layout
Working days
Issue Detail View
Roadmap

Quick Filters

Quick Filters can be used to further filter the issues in the board based on the additional JQL query.

Name	JQL	Description	
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="Add"/>
Only My Issues	assignee = currentUser()	Displays issues which are currently assigned to the current user	<input type="button" value="Delete"/>





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.**