What is JIRA?

Jira is a project management and issue-tracking tool. By using Jira it is assumed that a company uses **Agile** methodology. Consequently, learning Jira requires learning some Agile concepts.

Basics of Agile Methodology

Agile is a software development methodology that is centered around helping teams get more stuff done by self-organizing their work. Agile is ever-evolving and changing. It's about constantly improving as a team. To organize the work using Agile methodology one of the most important tools is an **Agile board**.

What is an Agile board?

An Agile board has different columns (presented as steps that are needed to have work done). In the simplest project, there are at least 3 columns: to do/in progress/done.

There are two primary ways to organize projects: Scrum and Kanban. The main difference is a sprint (Scrum has sprints, Kanban doesn't).

What is a sprint?
A sprint is a pre-determined amount of time where teams determine the work to get done. For example, a team decided on a two-week sprint, which means that every two weeks, a team holds a sprint meeting. This sprint meeting starts with discussing the last sprint->what went well->what didn't go well->what can we do better next sprint->discussions and agreements on the word to be completed in the next sprint. Then after two weeks, hold another sprint meeting with the same steps.

Kanban doesn't have sprints as workflows uninterruptedly, and the list to do/in progress/done changes continuously without time limits or organized check-up meetings.

Key Agile terms in Jira

A user story has a formula like: As a <type of user>,
I want <some goal>,
So what <some reason>.

User story example: As a technical writer, **I want** my documentation to be easy and intelligible to every user **so that I** can write my documentation correctly and comprehensively.

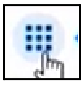
An Epic- is a story that is too big for a single sprint. It’s broken down into multiple user stories. When those are done, the epic is complete. Epics in Jira contain multiple user stories.

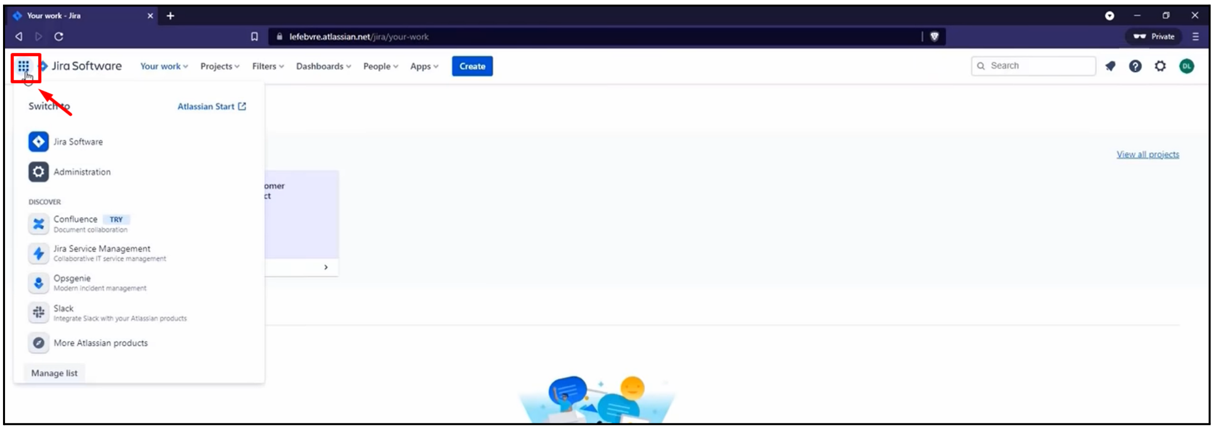
Jira terms

Issues are containers for fields and fields hold all of your data (e.g. descriptions, summary, assignee, Due Date).

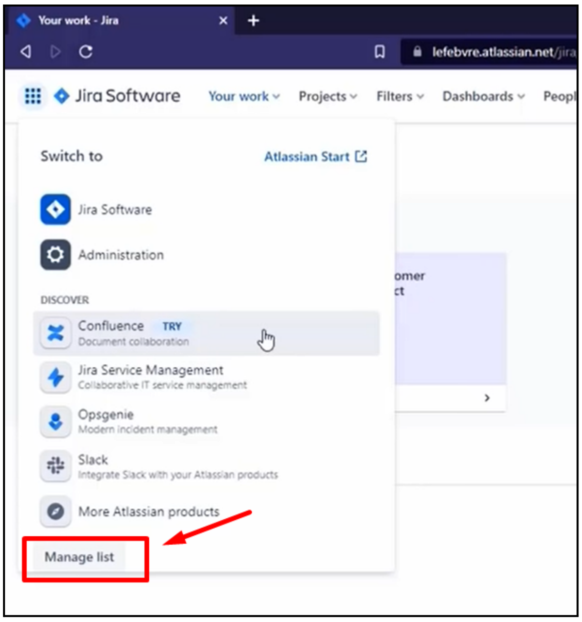
Projects are containers for issues that live inside your Jira projects.

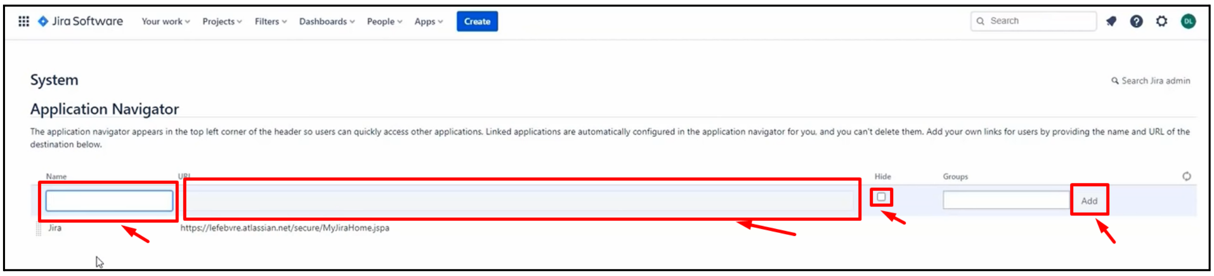
Jira’s interface

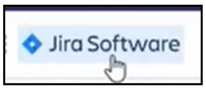
1. To switch between the different Atlassian products, click the  button.



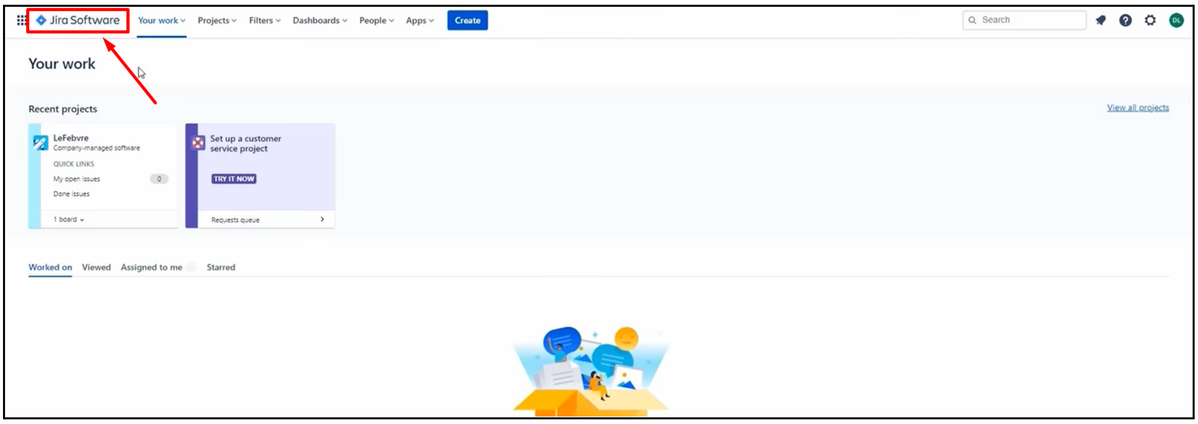
Tip: If you have administrative permission, you can customize the list of the products. Click **Manage list** at the bottom of the dropdown list and add different internet links, or to any specific documentation to have quick access to this inside of Jira (type the name, **URL**, check or uncheck **Hide** and click **Add**).





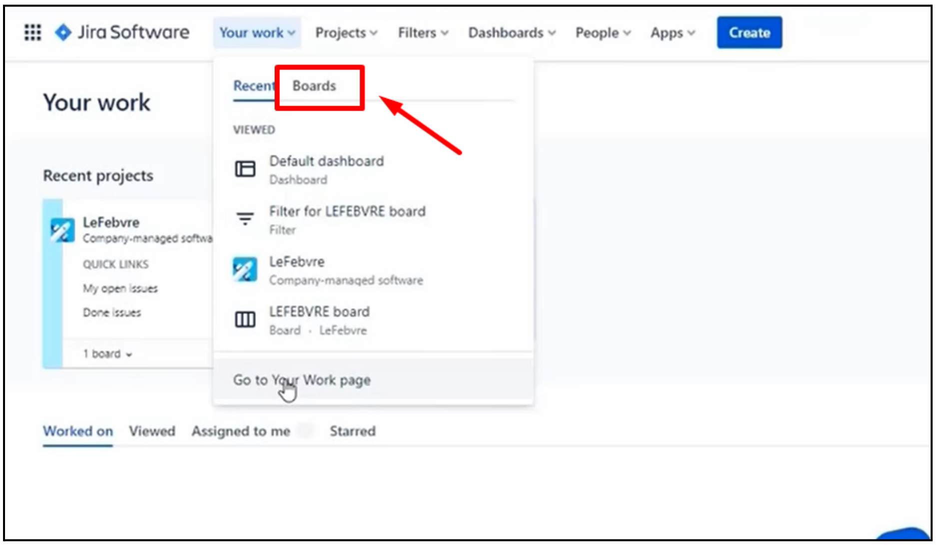
2. Click 

to come back to the home page.

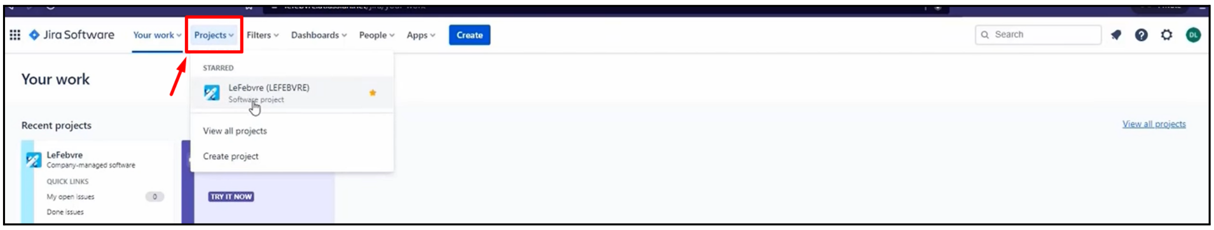


3. To access the recent works click **Your work**.

4. To access your recent boards, click **Boards**.

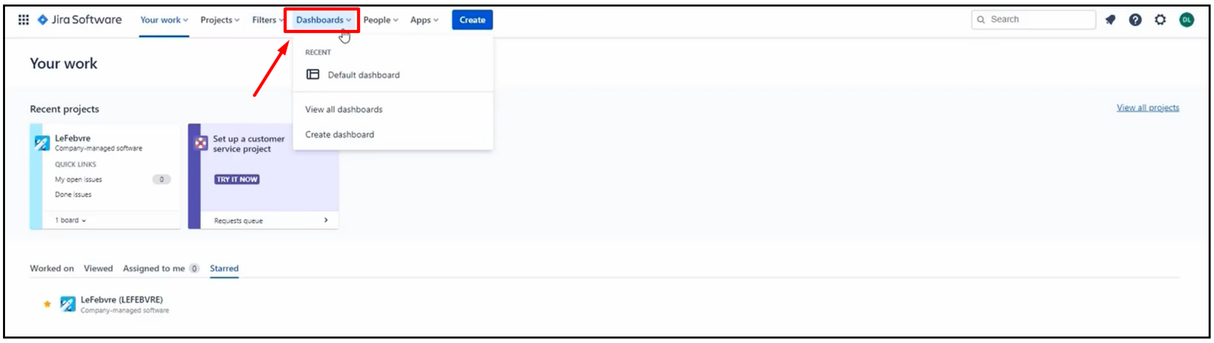


5. To access or create your projects, click the **Projects** button.

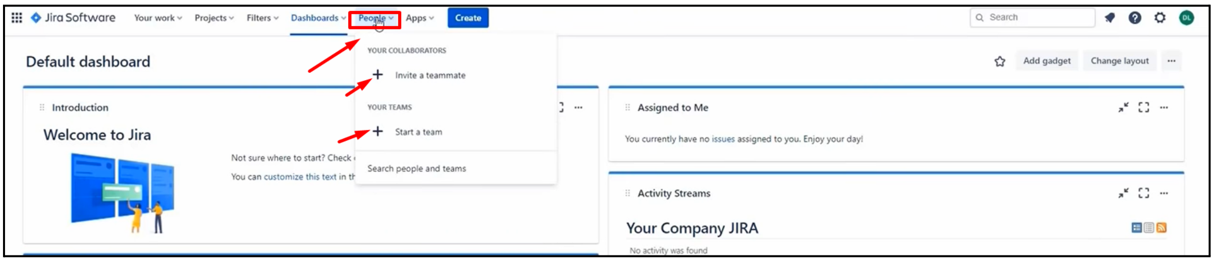


6. To access or build your filters, click **Filters**.

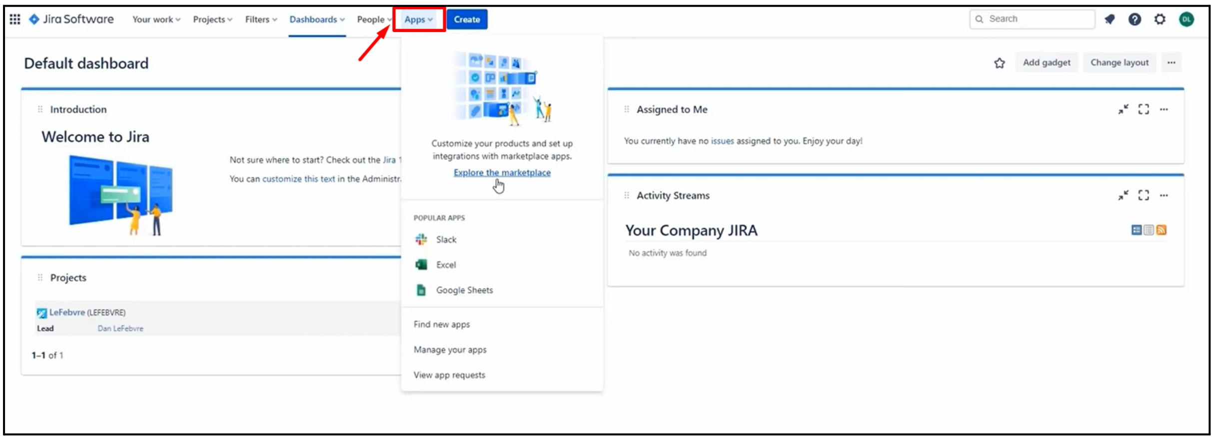
7. To see the things you are working on and be able to share them with users, click **Dashboards**.



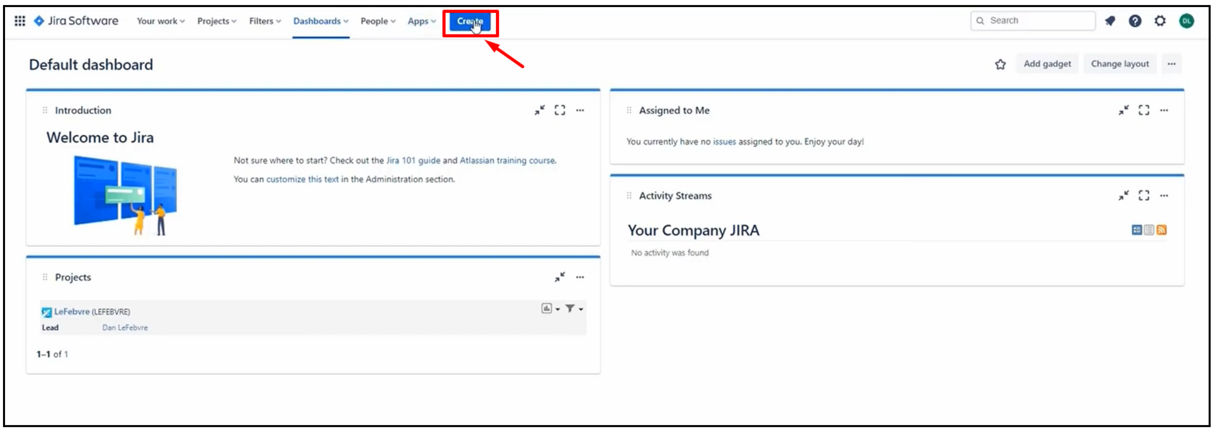
8. To find people in your organization (e.g. invite a teammate, start a team, search people and teams), click **People**.



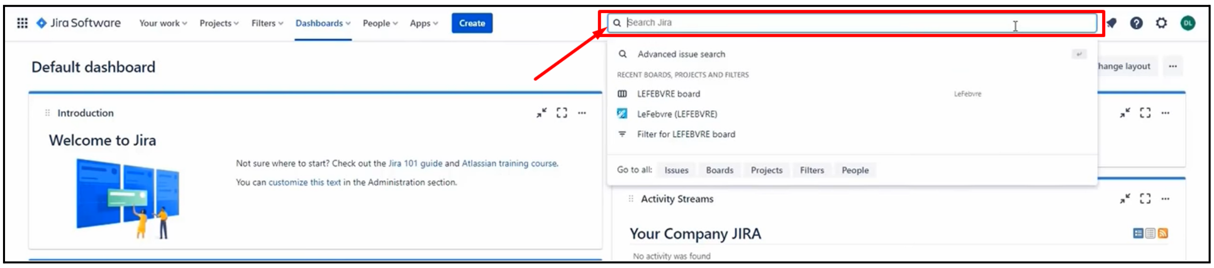
9. To add any other functionalities to Jira (e.g. Exel, Stack, Google Sheets), click **Apps**.



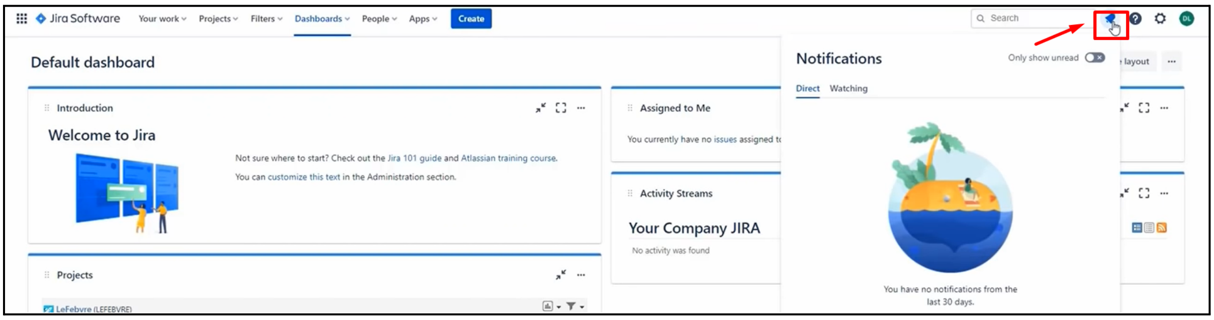
10. To create a new issue, click the **Create** button.



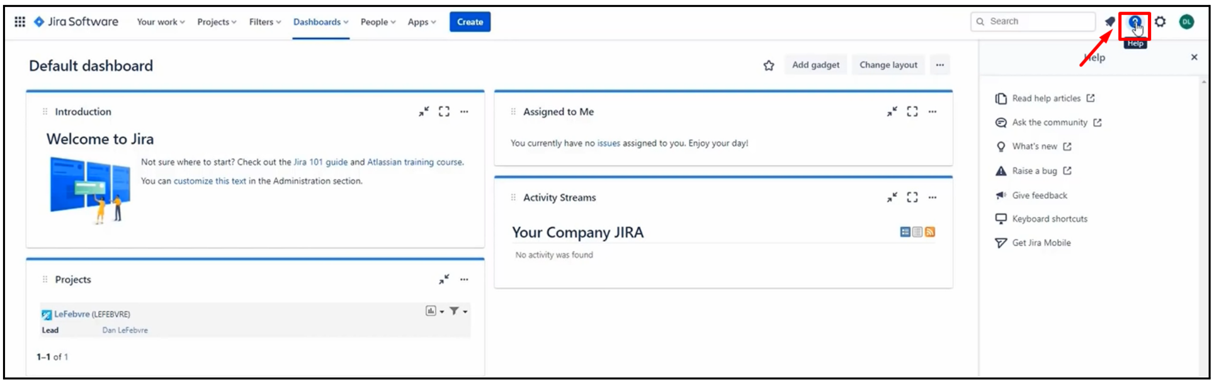
11. To search for issues, click the search box at the top-right of the screen.

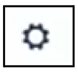


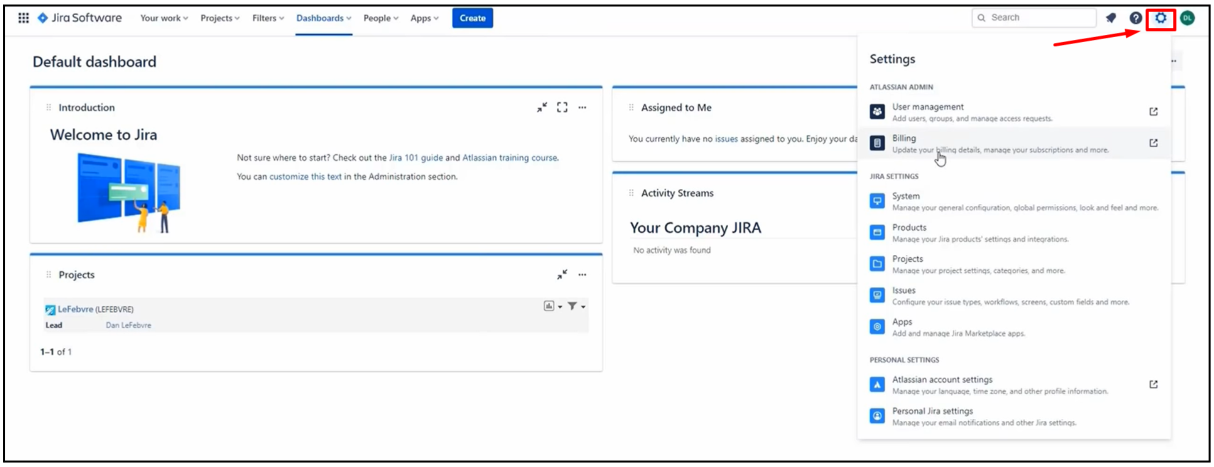
12. Click the notification icon to see your notifications (e.g. when somebody comments on your issue, watching, or tags your user name).



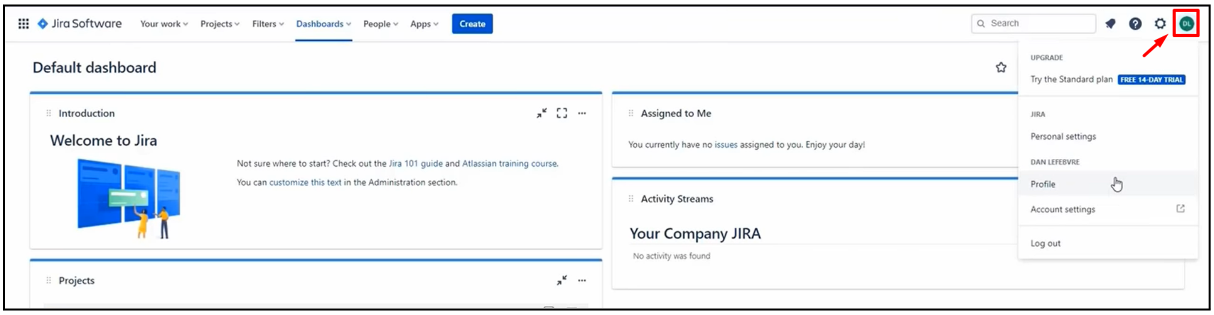
13. To have some explanations and answers to your questions click the  icon.



14. Click the  icon to see as a user your personal settings (e.g. language, time zone, etc.), and personal Jira settings (e.g. manage your notifications, etc.).



15. To see or change your personal settings click the icon on the top-right corner of the screen.



Team-managed vs Company-managed projects

Team-managed projects were introduced in 2018 as ‘Next-gen projects’ and then they were renamed in 2021 to Team-managed projects. Team-managed projects don’t require admin permission to create them because all entities (e.g.issue types, statuses, resolutions, etc.) live inside the project. Team-managed projects are fast and easy to set up and maintain because any team member of your organization can create one and they can maintain that project, share it and a team can work together.

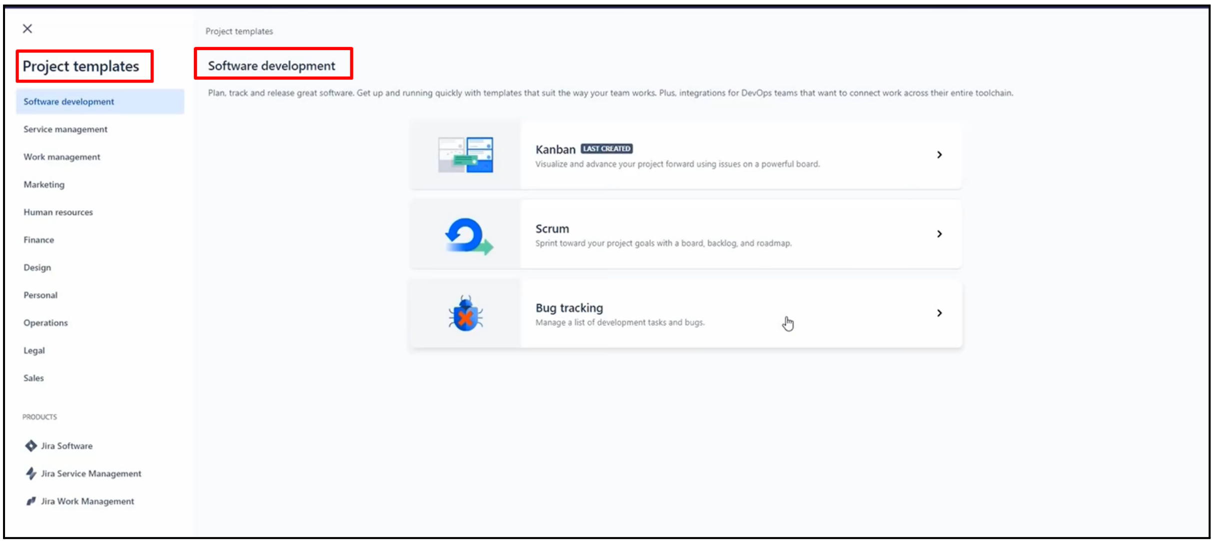
Company-managed projects (used to be called ‘Classic Projects’), require admin permissions to create. One of the key reasons why Jira admin permission is required for a company project is because entities can be shared across other company-managed projects. Company-managed projects are more complicated to set up and maintain because these entities are shared across multiple company-managed projects.

How to create a team-managed project

To create a team-managed project:

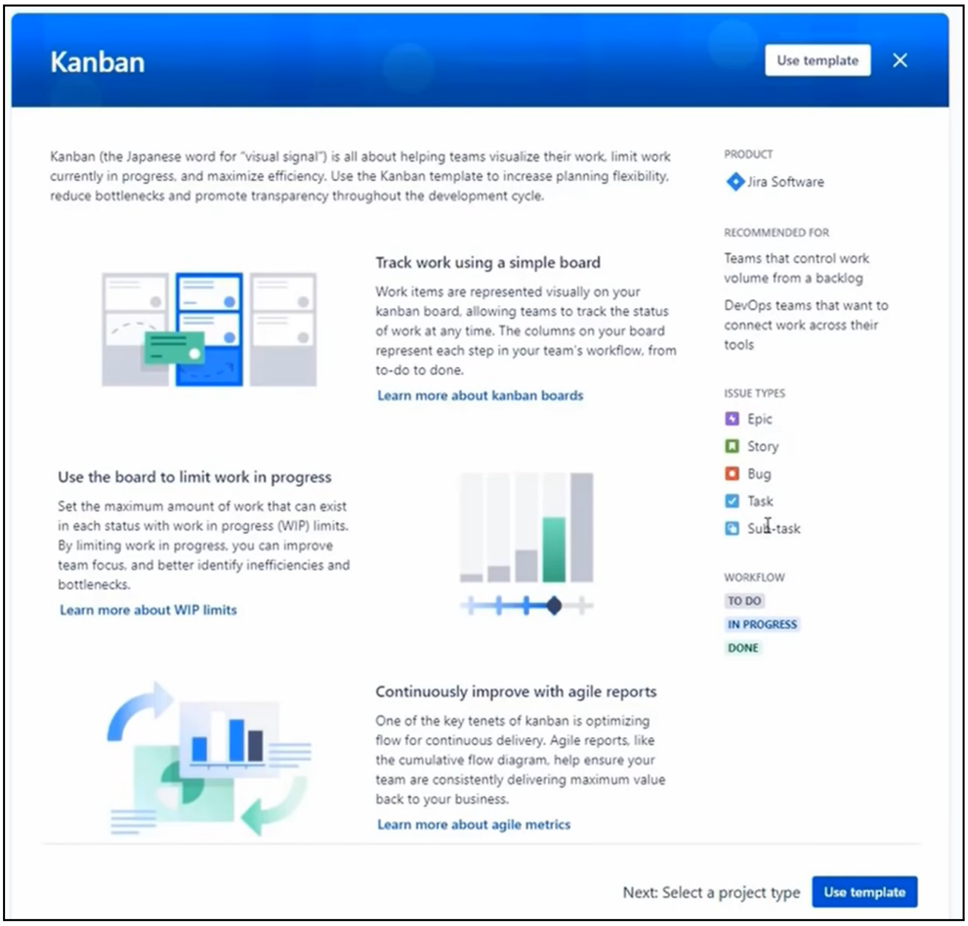
1. Click **Projects**>**Create project**.

2. Choose a project template from the suggested (Kanban, Scrum, Bug tracking) or the list at the right of the screen.

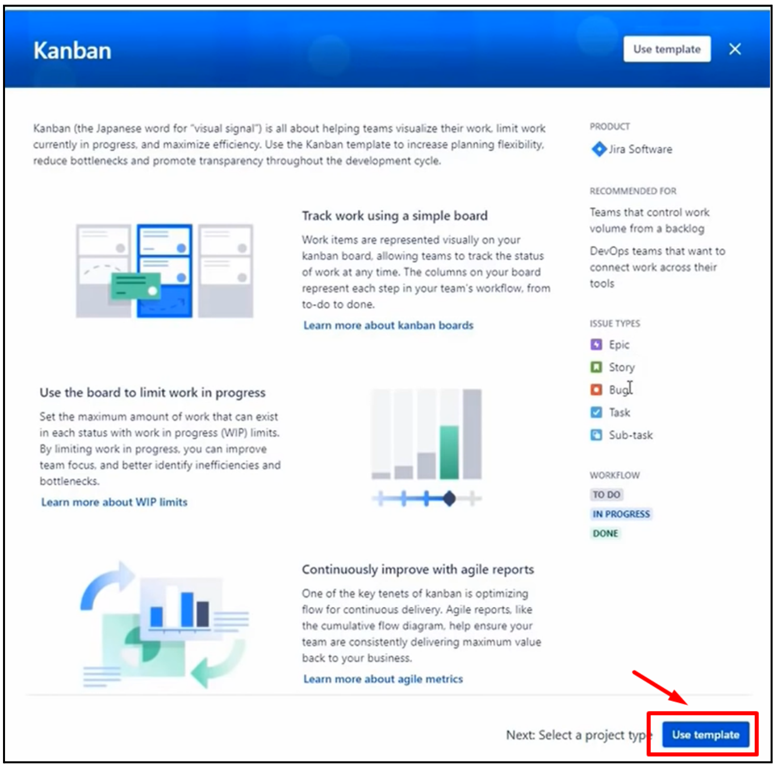


Note: not all the features are available, sometimes you need to have administrative permission to use a template.

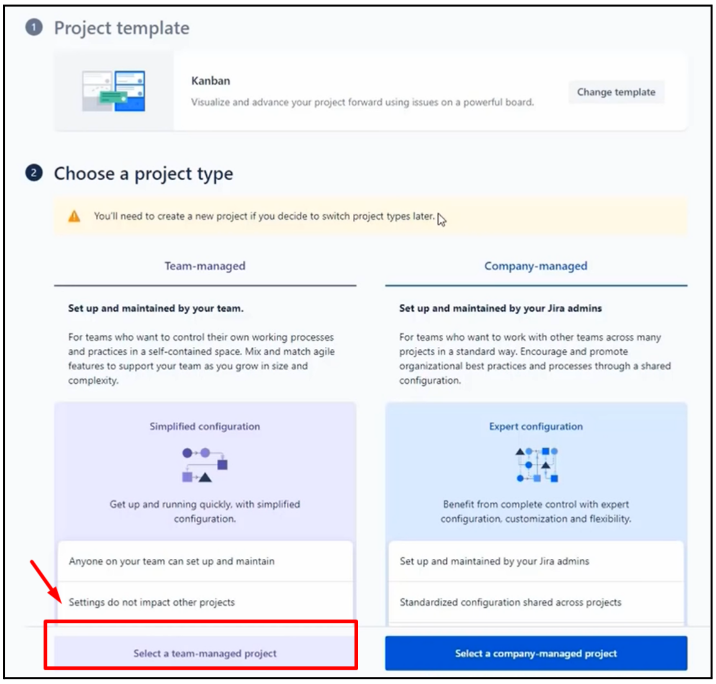
As an example, choose the Kanban template. This template creates issue types (Epic, Story, Bug, Task, Sub-task), and gives the workflow (to do/in progress/done).



3. To use the Kanban template click **Use template**.

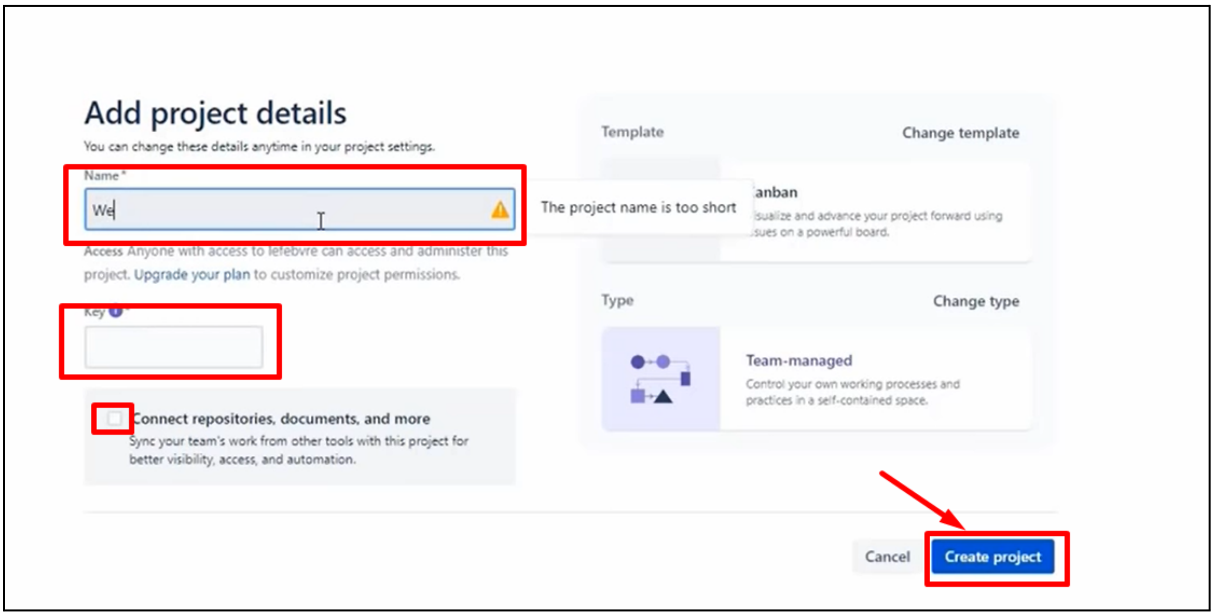


4. Click **Select a team-managed project** to create your team-managed project.



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

5. Type your **Name**, **key**, check/uncheck the checkbox and click **Create project**.

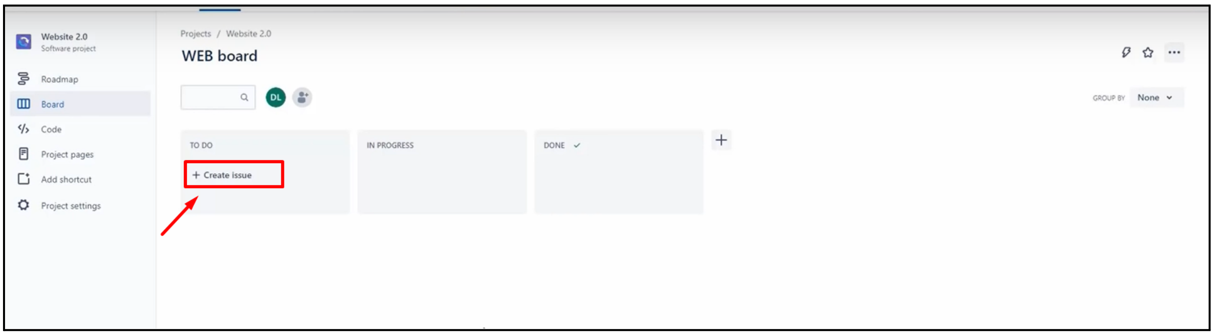


The team-managed project is created.

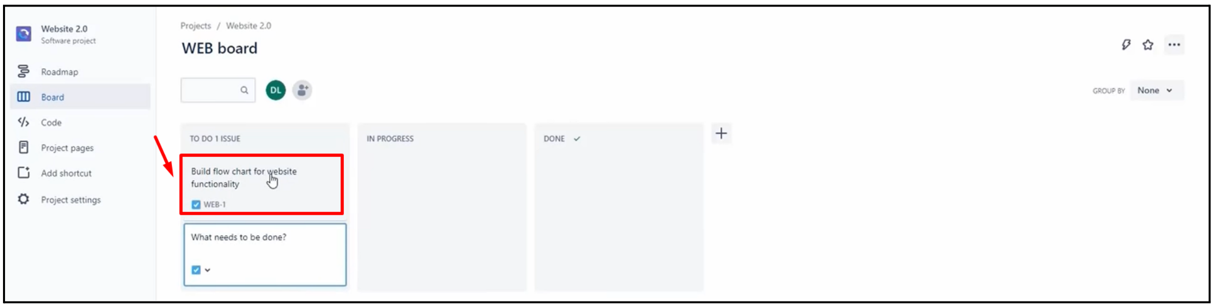
How to navigate team-managed projects

To navigate team-managed projects:

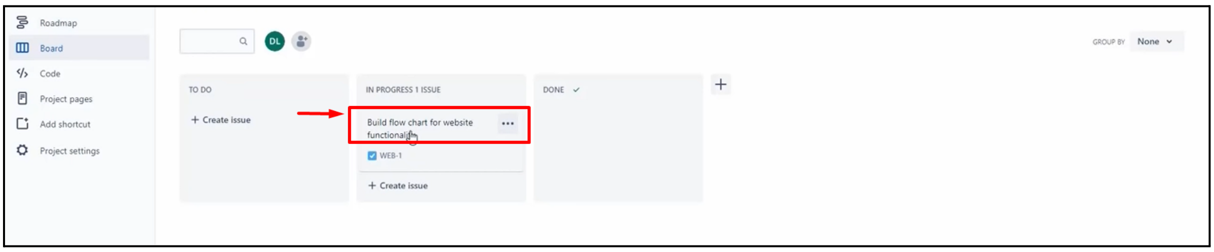
1. Click **Create issue**.

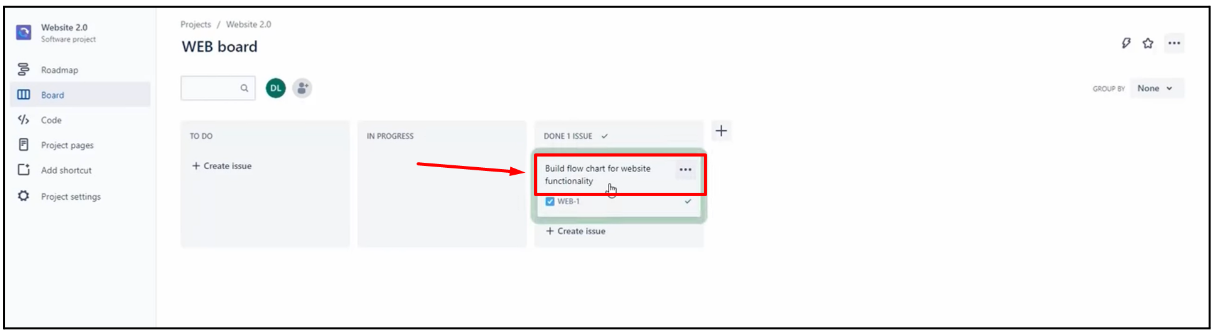


2. Type your issue into the **to do** list.

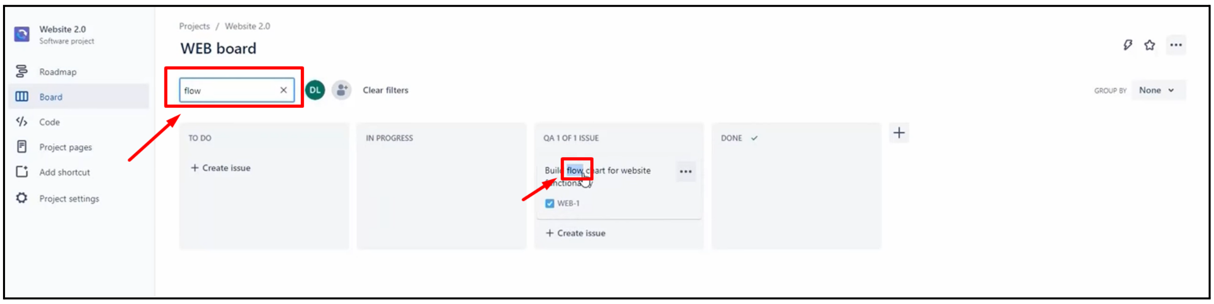


3. Drag the issue throughout the different columns (from left to right as work is completed).

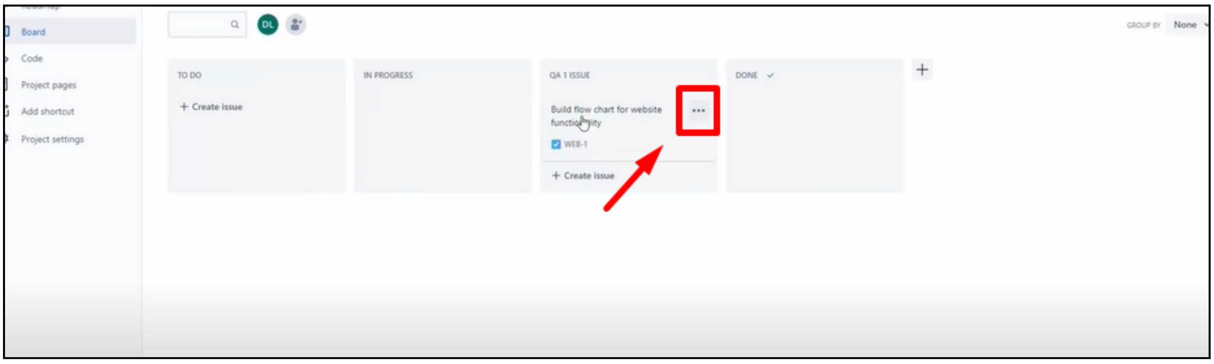




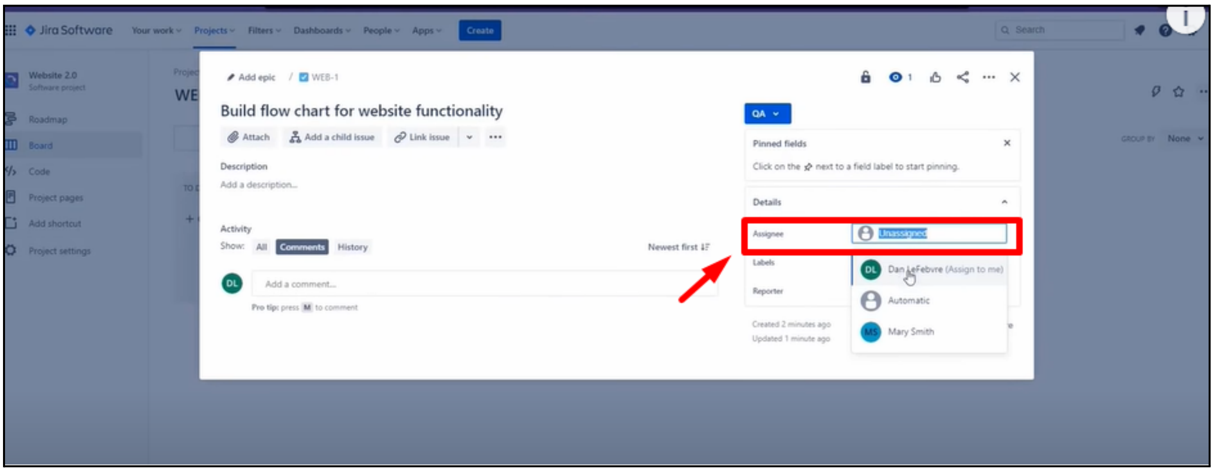
4. To filter issues, click the search box at the left of the screen.



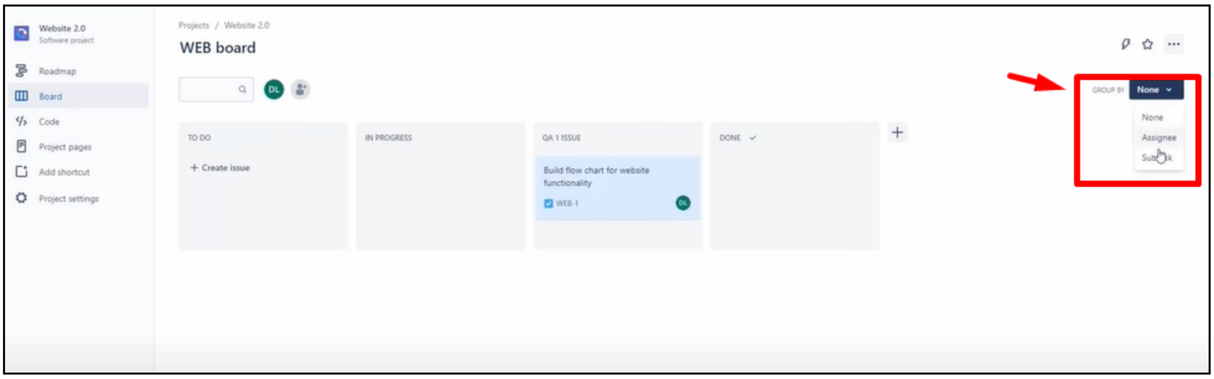
5. To assign an issue click the  icon.



6. Type or choose from the dropdown list the assignee.



7. To group your issues click **None** at the right of a screen and choose group by **assignee** or **subtasks** from the dropdown list.

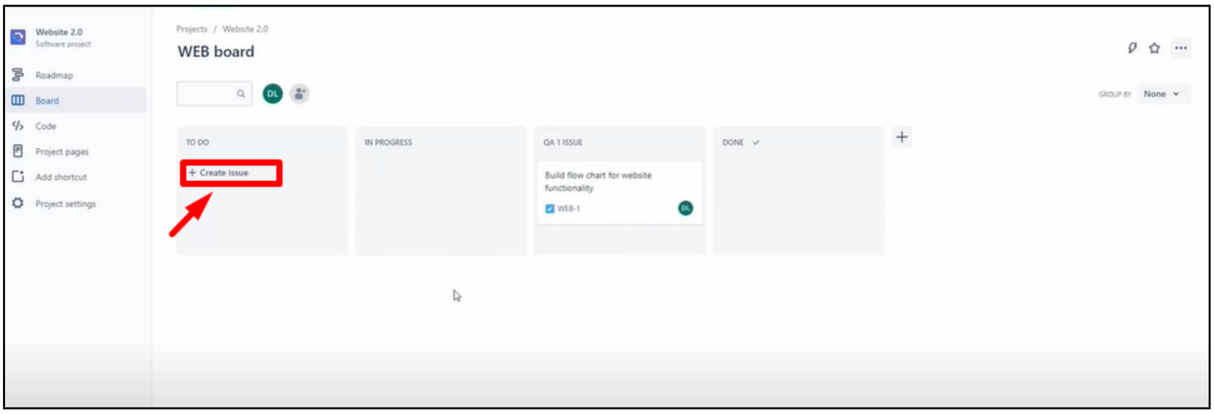


How to create issues in team-managed projects

To create issues in team-managed projects:

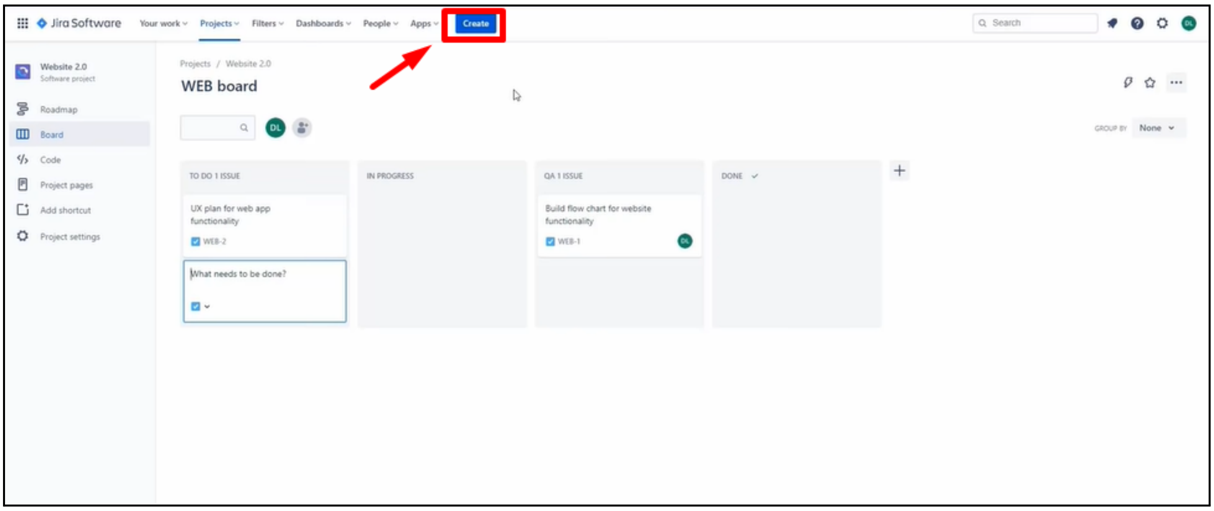
The first way is:

Click **Create issue** in the to do list and type your issue.

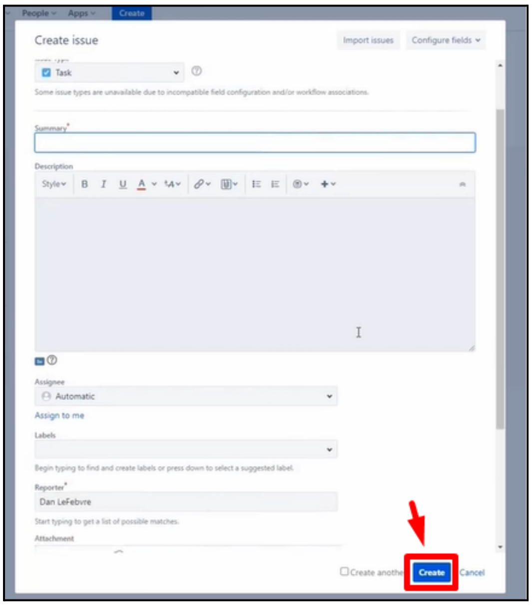


The second way is:

Click the **Create** button or shortcut **c** on the keyboard.



Fill in the appeared form and click **Create**.



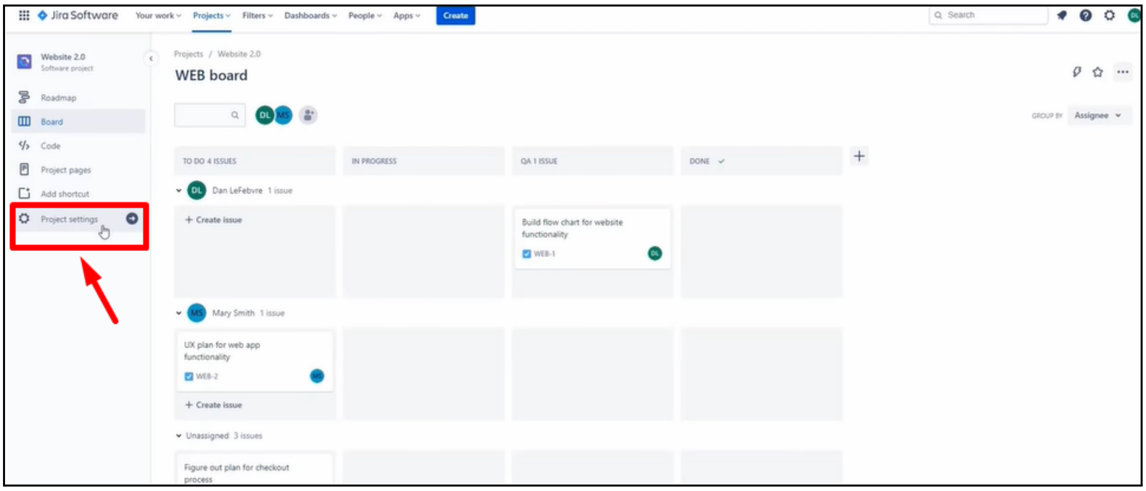
The issue is created.

Customization of team-managed projects

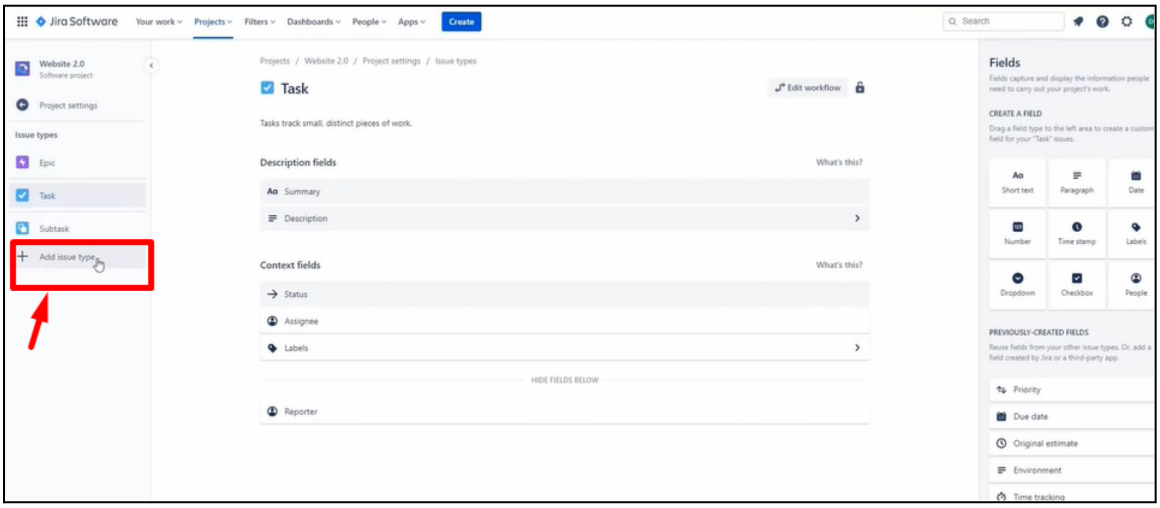
How to add issue type

To add issue type:

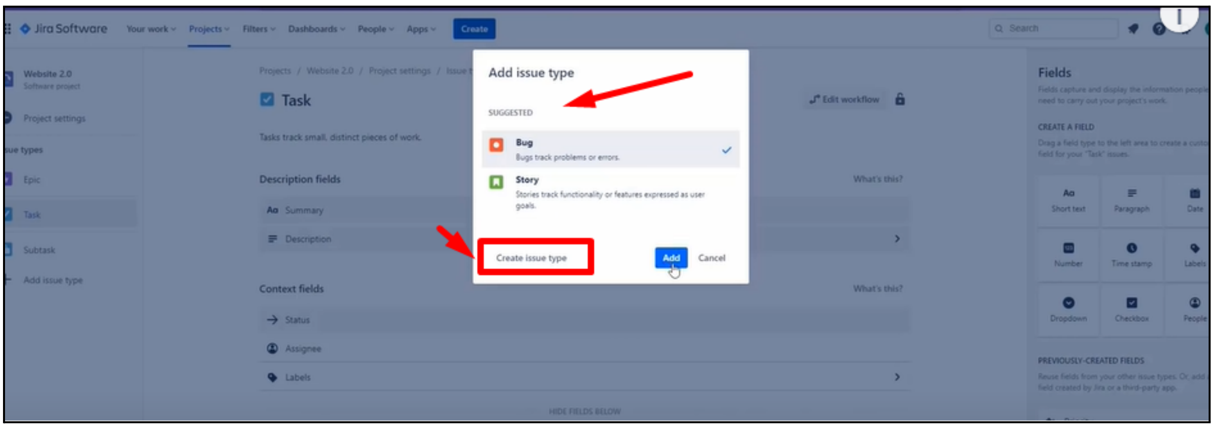
1. Click **Project settings**.



2. Click **Add issue type**.

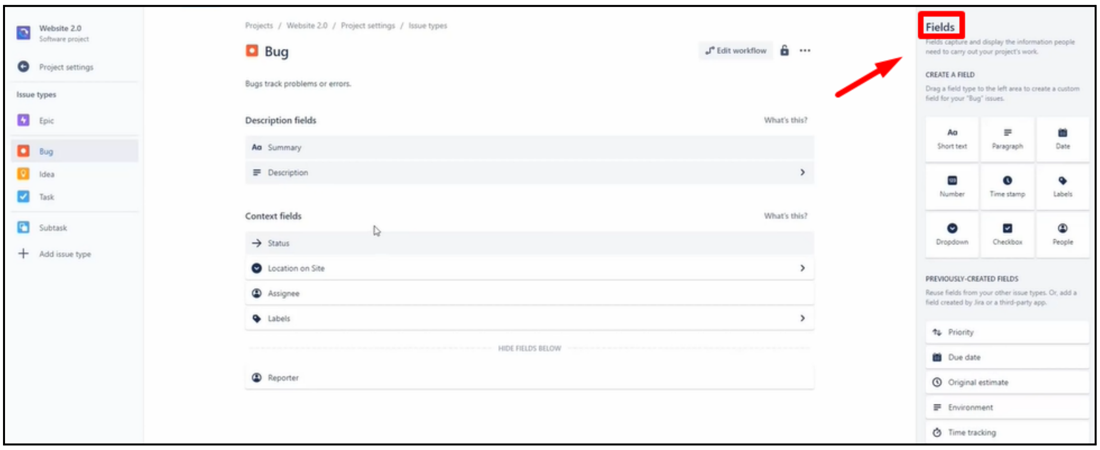


3. Select the suggested issue types or click **Create issue type** to create your own issue type, then click **Add**.



How to add a new field to your issue

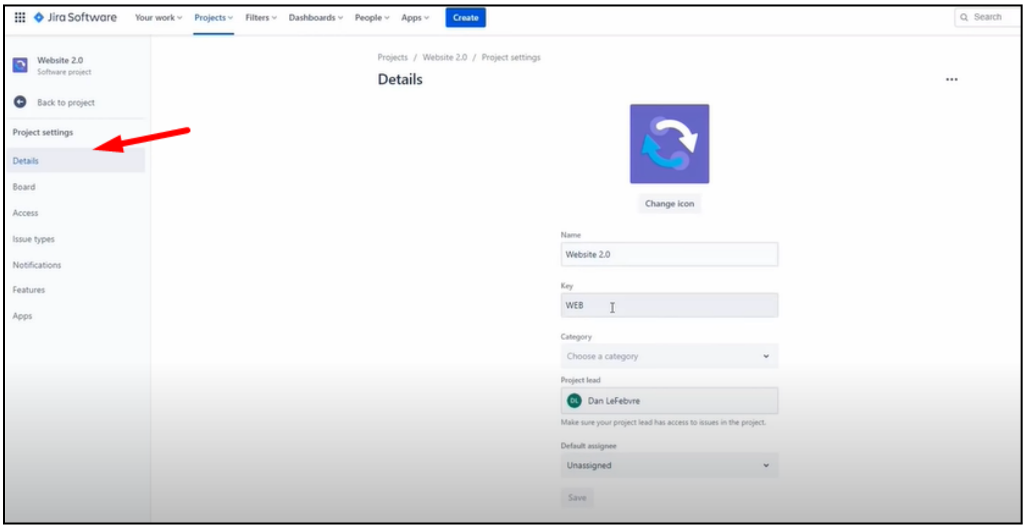
To add a new field to your issue, choose a necessary field from the right of a screen (e.g. short text, paragraph, date, number, etc.).



How to change the details of your issue

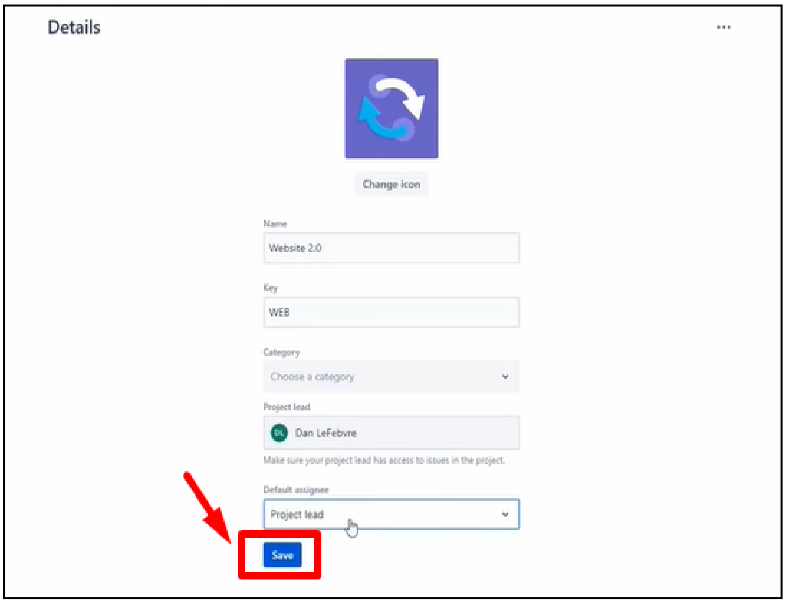
To change the details of your issue:

1. Click **Details** in the **Project settings**



2. In the **Details** you can change your icon, name of the issue, key, default assignee.

3. Click the **Save** button to save the changes.

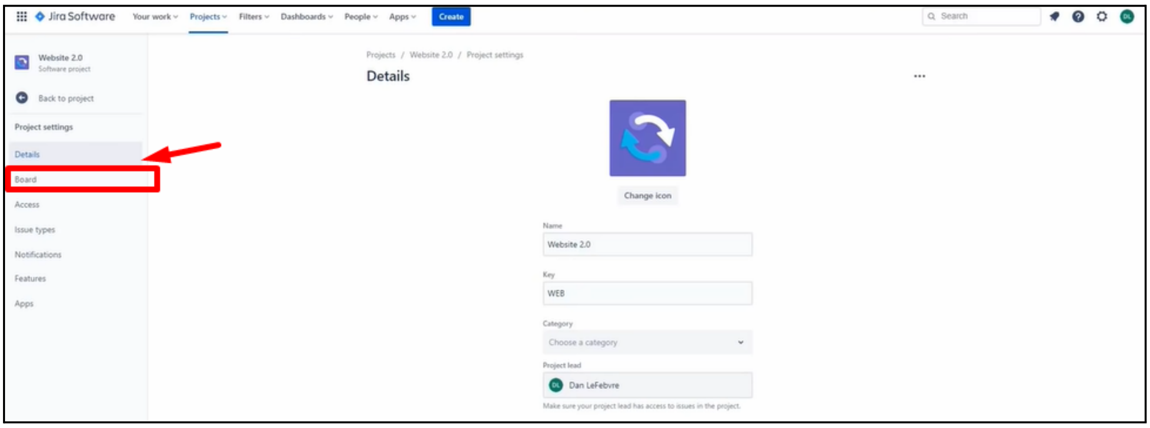


The details of your issue have been changed.

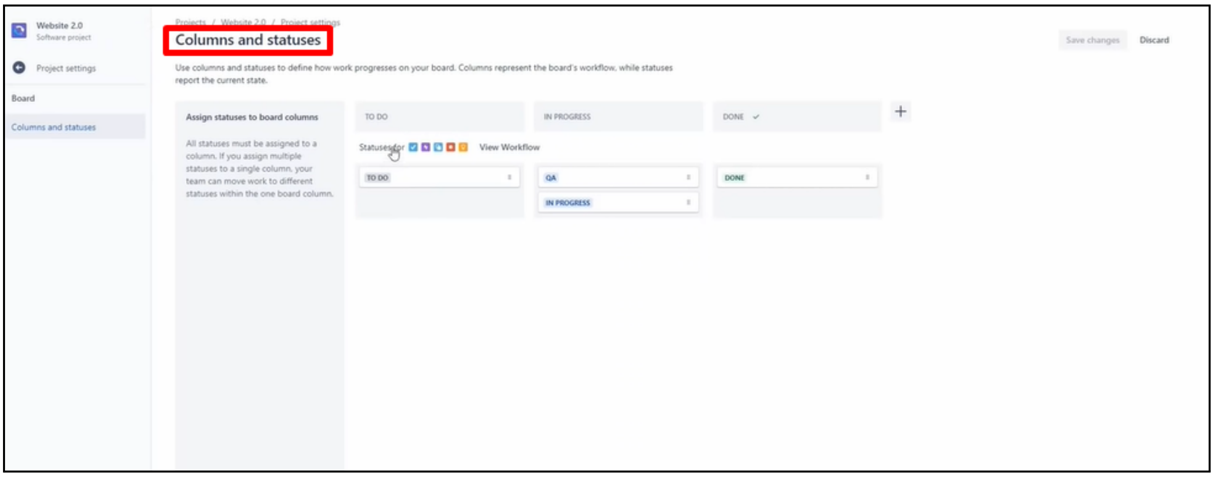
How to customize the board

To customize the board:

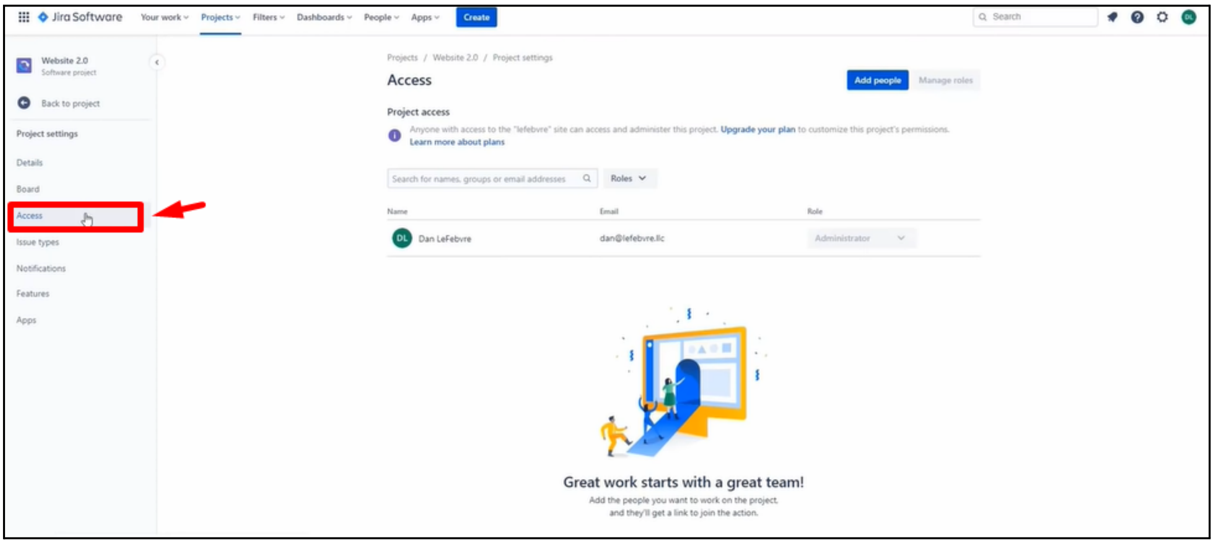
1. Click **Board** at the right of the screen.



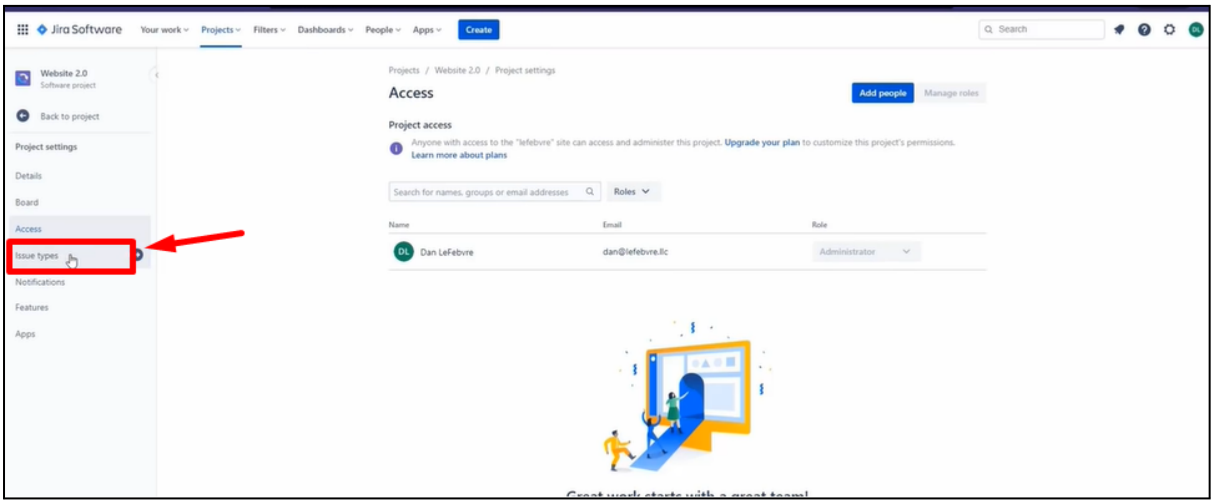
2. In the section **Columns and statuses** you can drag your issues between to do/in progress/done and change their statuses.



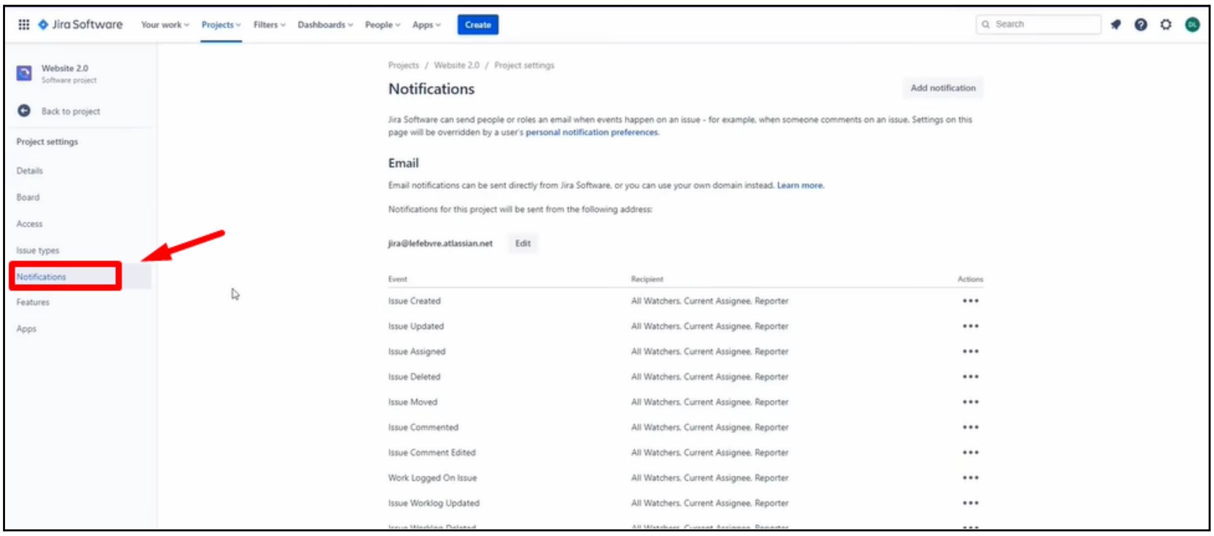
3. To control who can see your project click **Access** at the left of the screen.



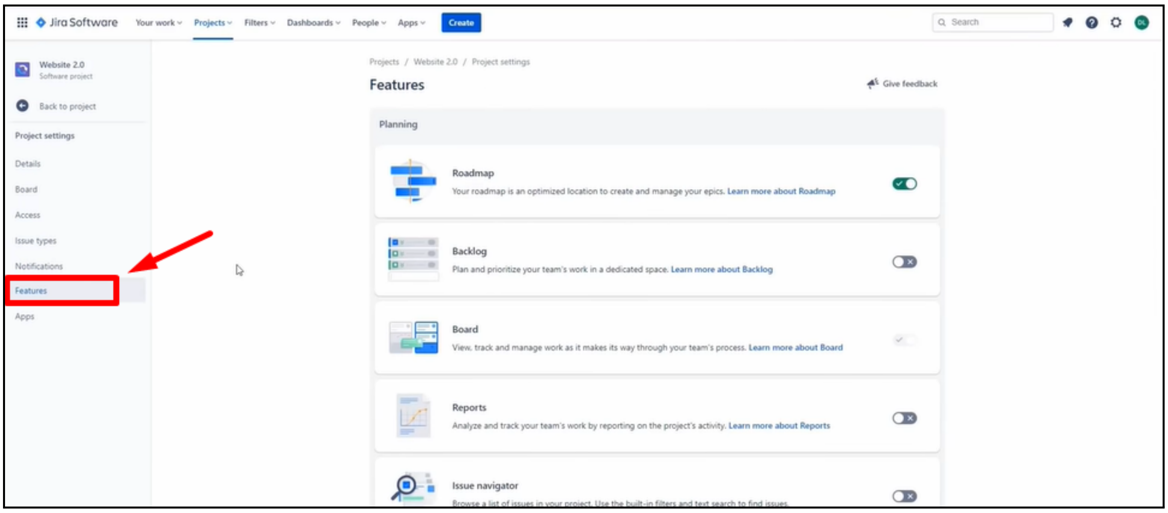
4. To choose an issue type click the **Issue type** button.



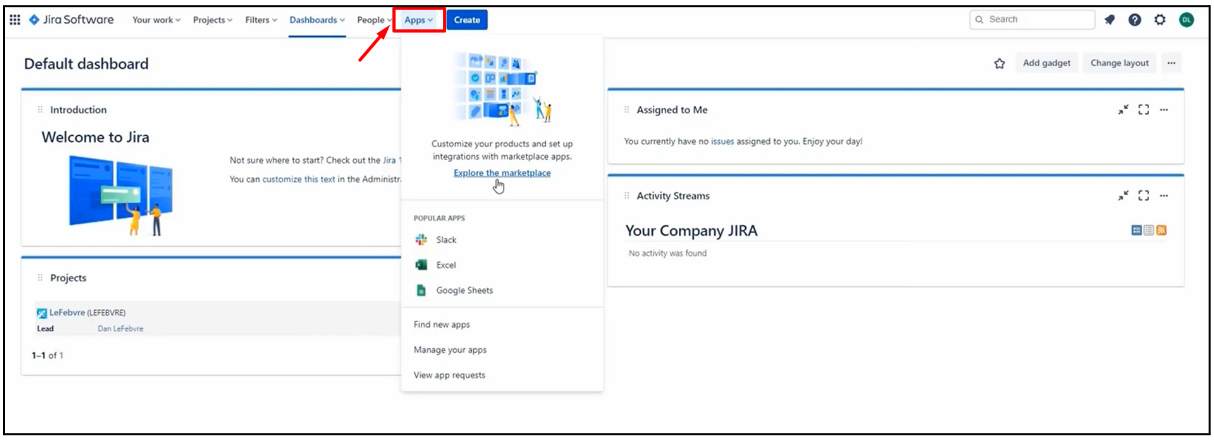
5. To control your notifications click the **Notifications** button.



6. To control (turn on/turn off) the features in your issues, click the **Features** button.



7. To discover apps or automatically tell Jira to do things, click **Apps**.



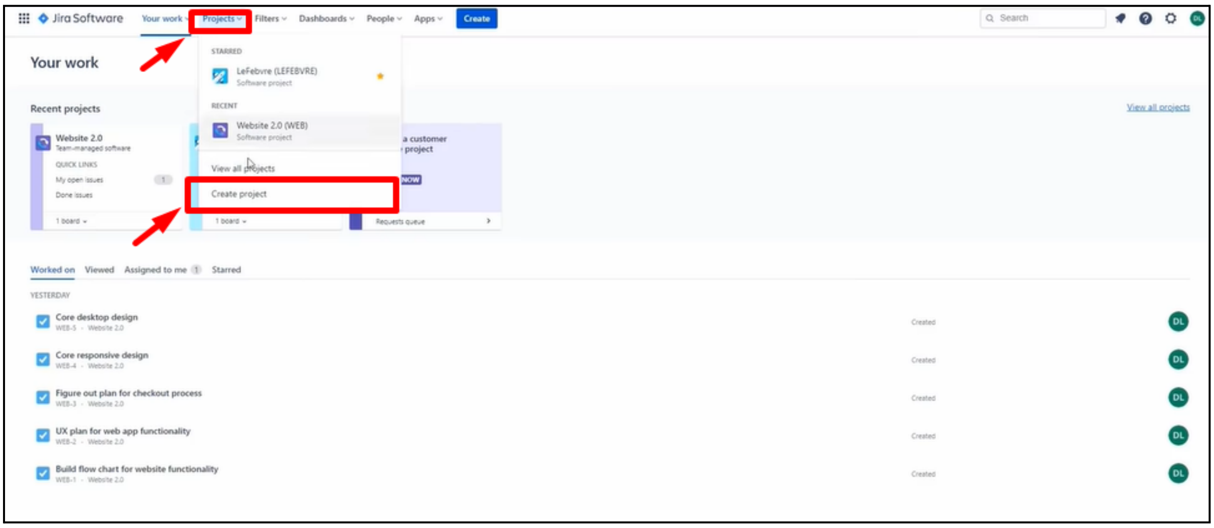
The main customization features of team management have been described.

How to create a company-managed project

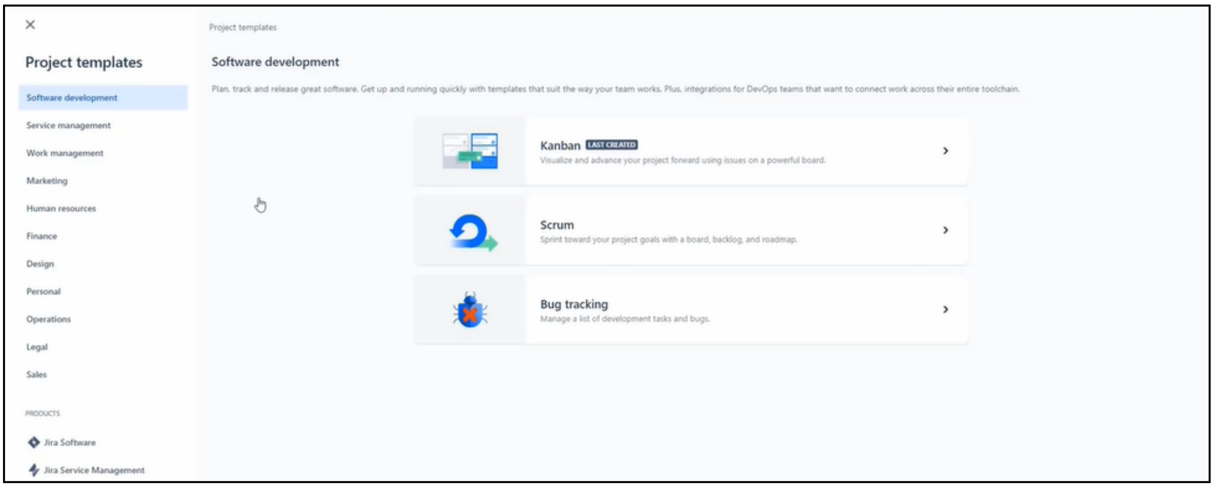
To create a company-managed project:

Note: You have to have Jira administration permissions to create company-managed projects.

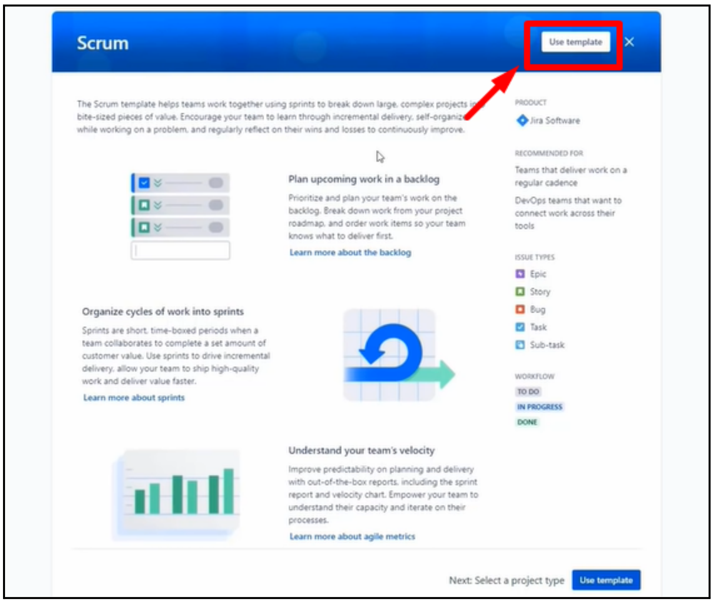
1. Click **Projects**>**Create project**.



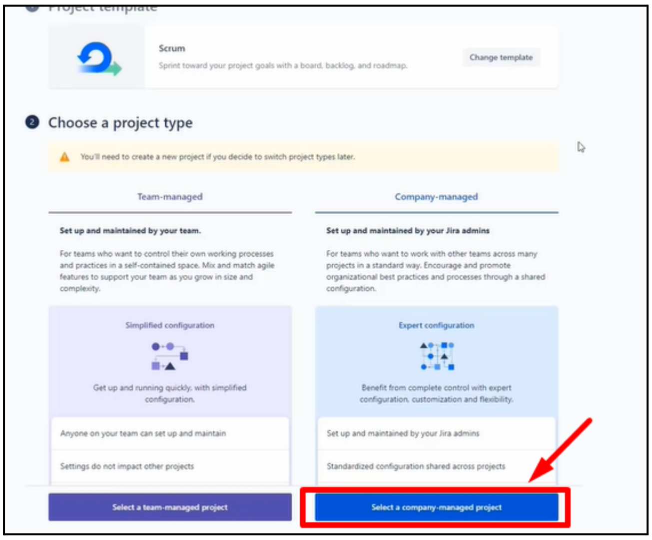
2. Choose a project template.



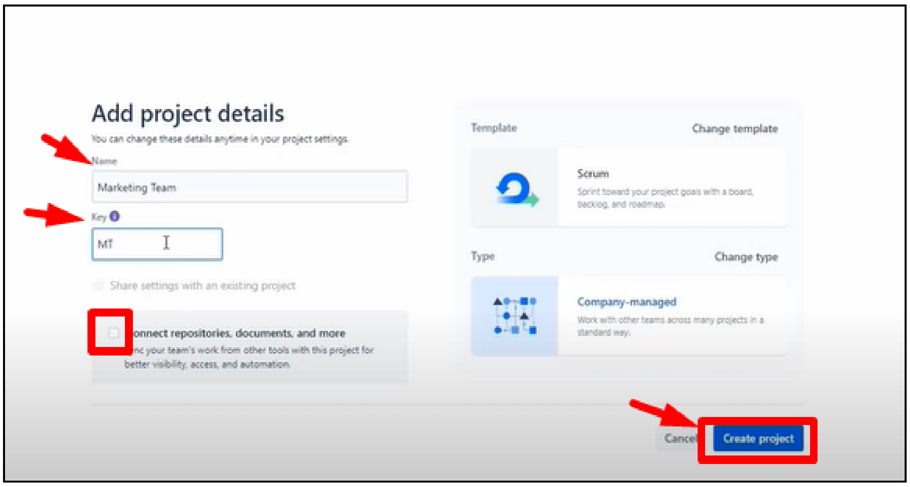
3. As an example, choose the Scrum template and click **Use template**.

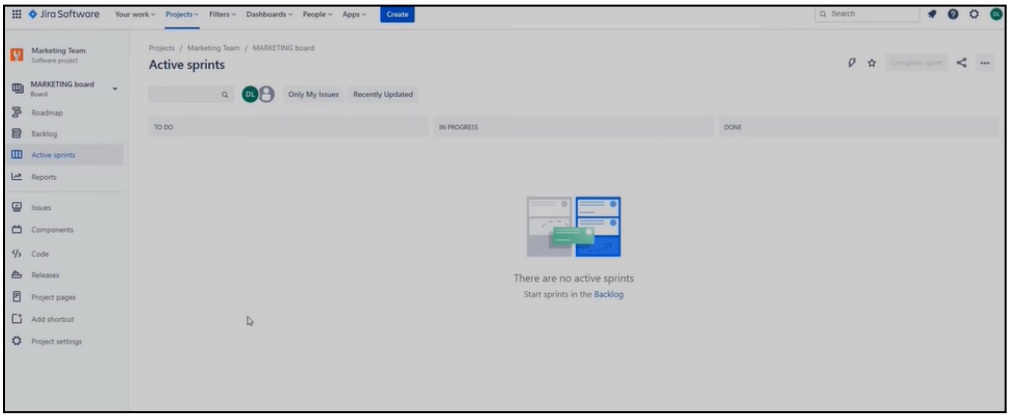


4. Click **Select a company-managed project** to choose your project type.



5. Add details to your project (**Name**, **Key**, check/uncheck the checkbox to connect your repositories, documents, etc.), and click **Create project**.

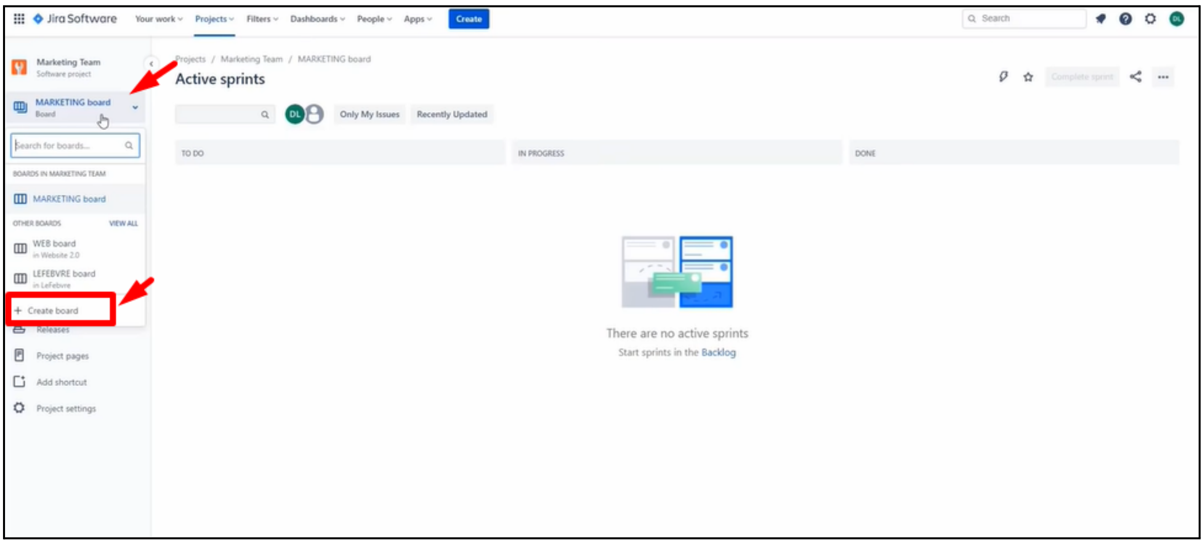




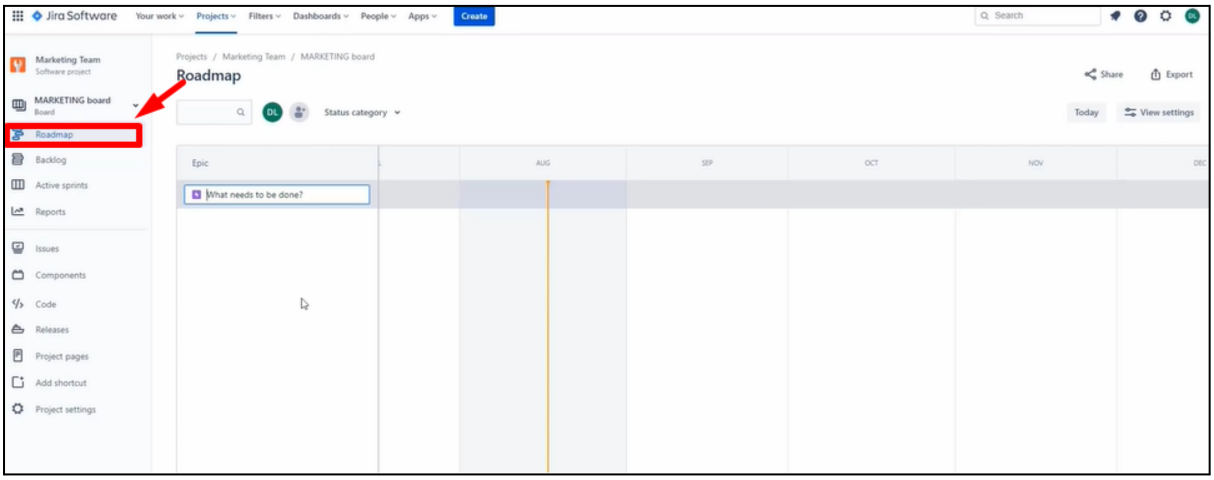
The company-managed project has been created.

How to navigate a company-managed project

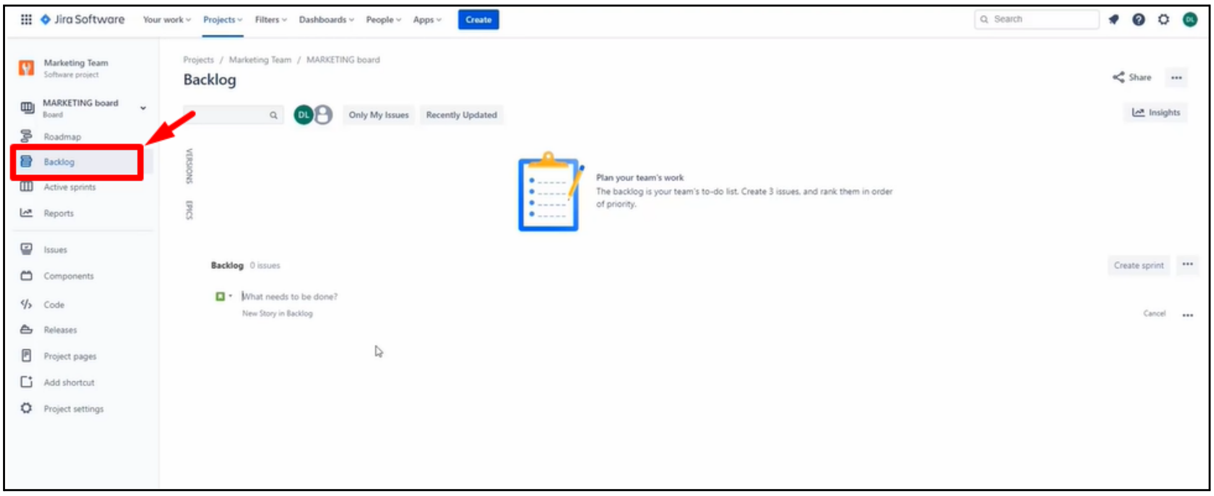
1. To see Agile boards or create a new click **MARKETING board** or if you want to create a new board, click **Create board**.



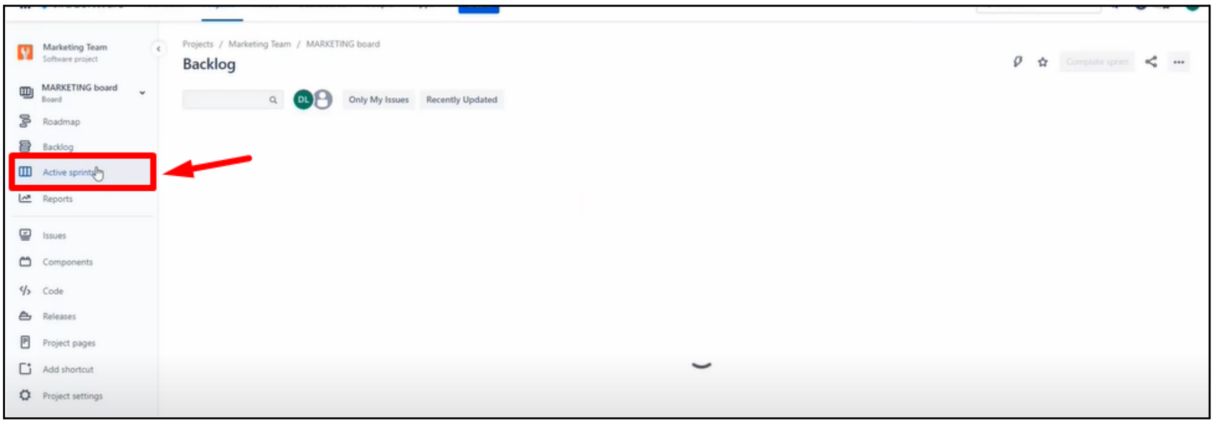
2. To see all the epics in your project, click **Roadmap**.



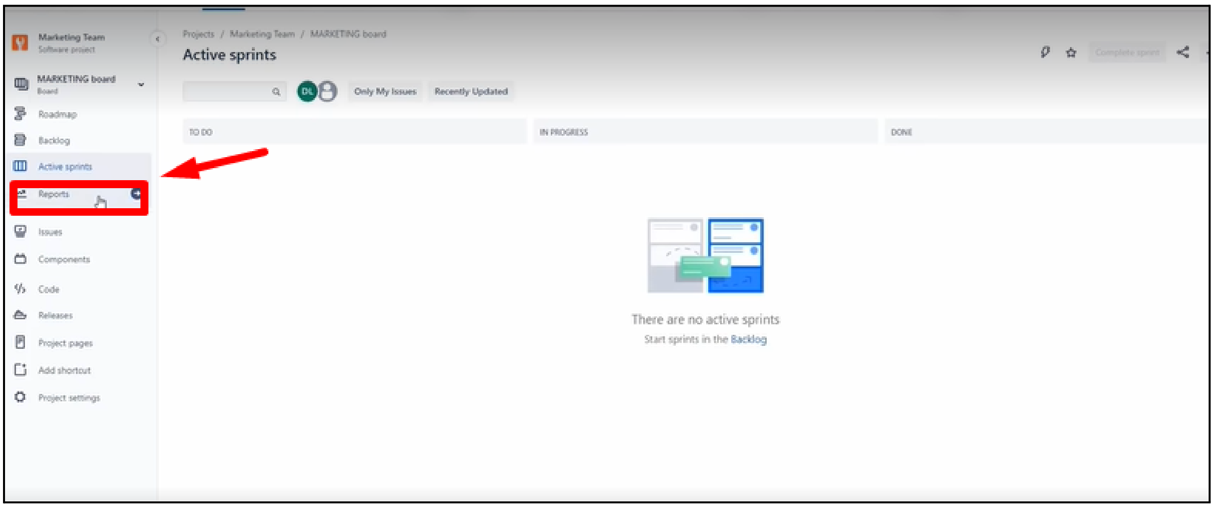
3. Click **Backlog** to see and plan your teamwork.

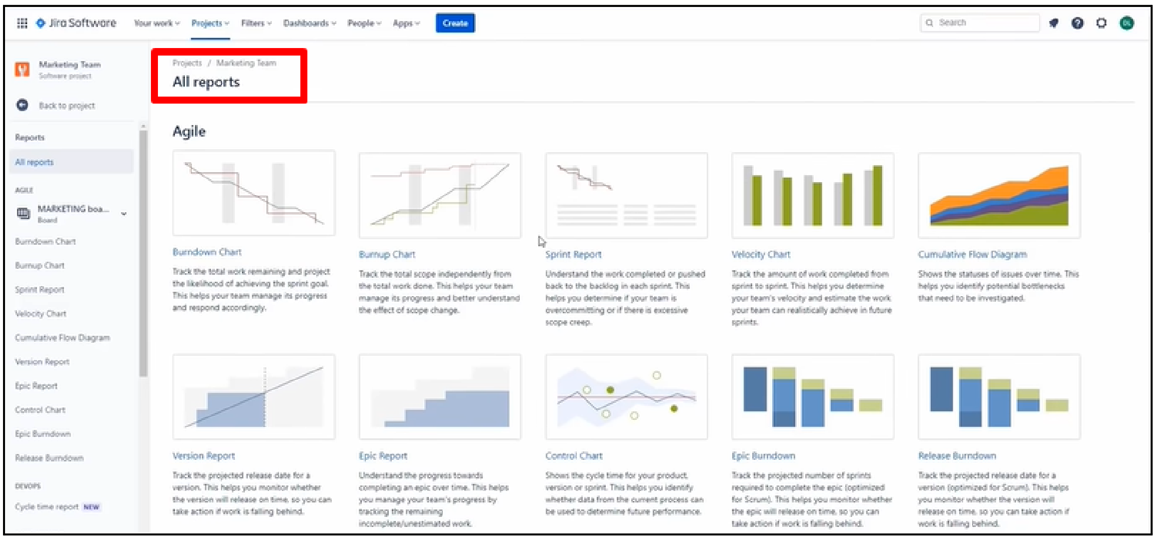


4. To see the active sprints click the **Active sprints** button.

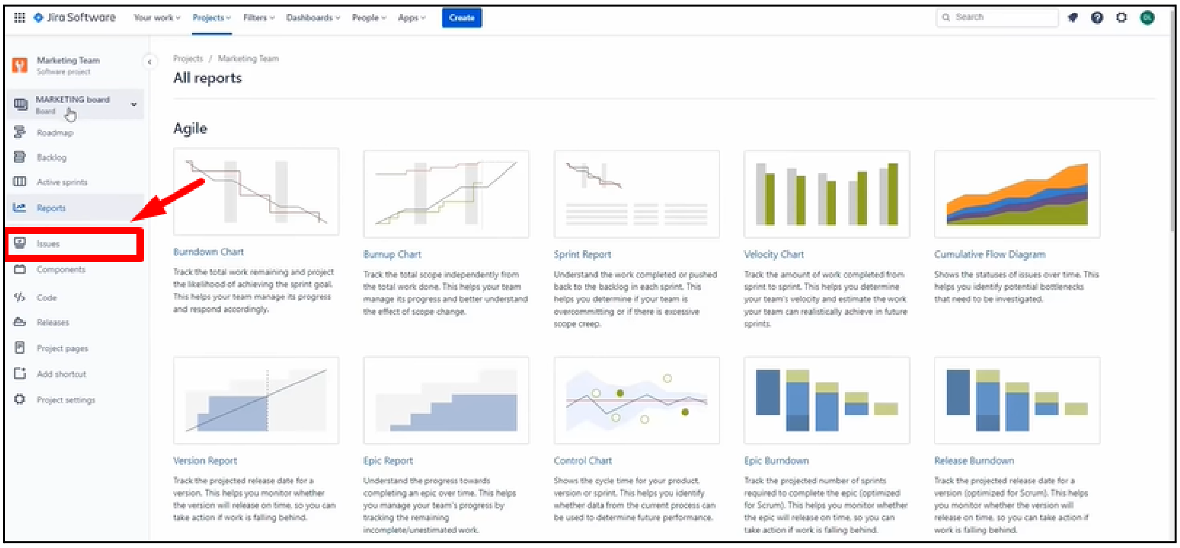


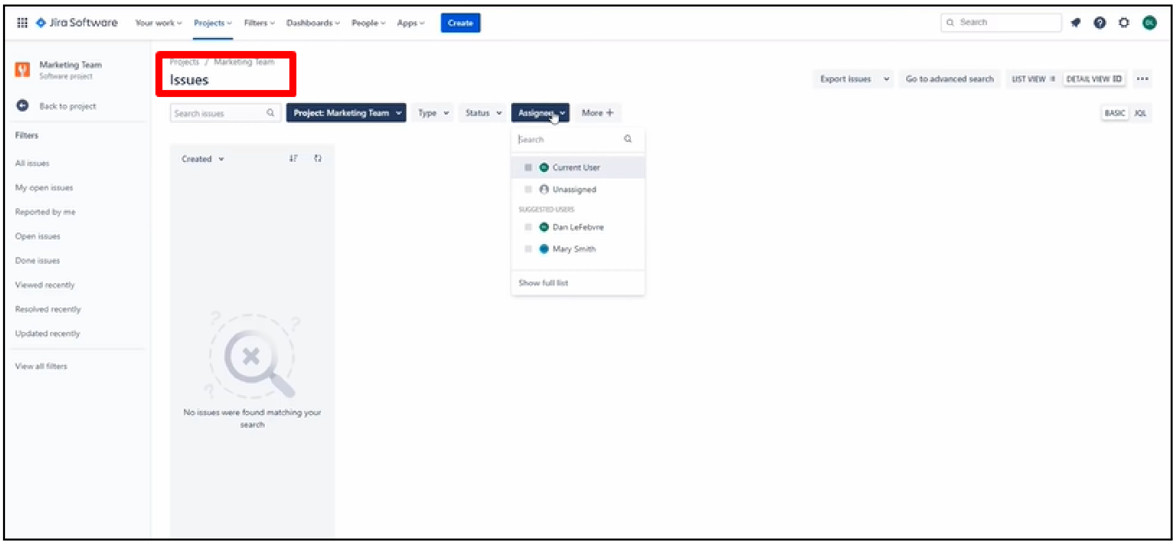
5. To find all the necessary reports for your projects, click **Reports**.



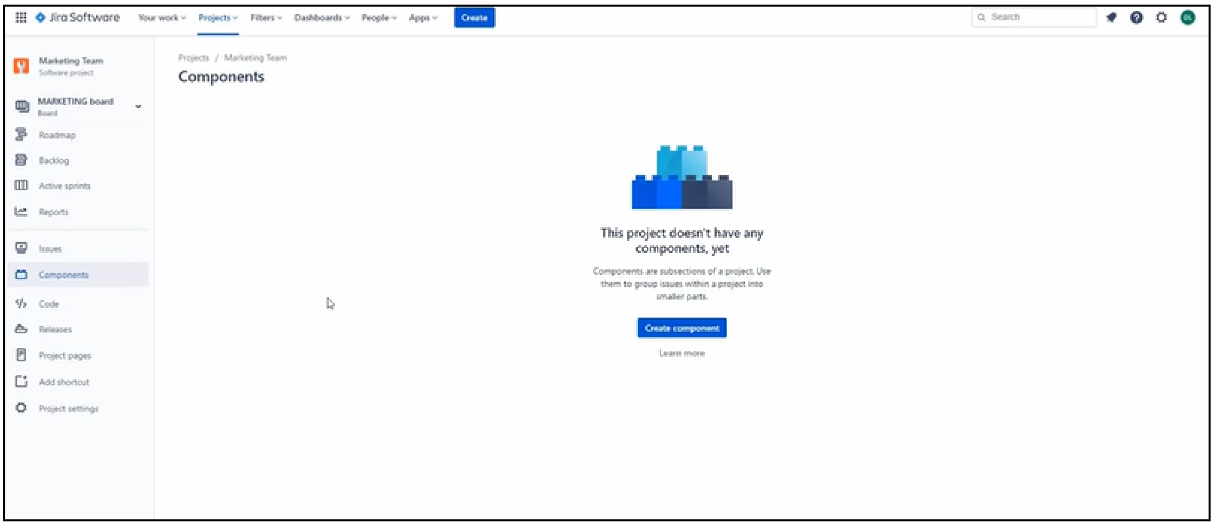


6. To see the list of all the issues that are based on your project, click **Issues**.

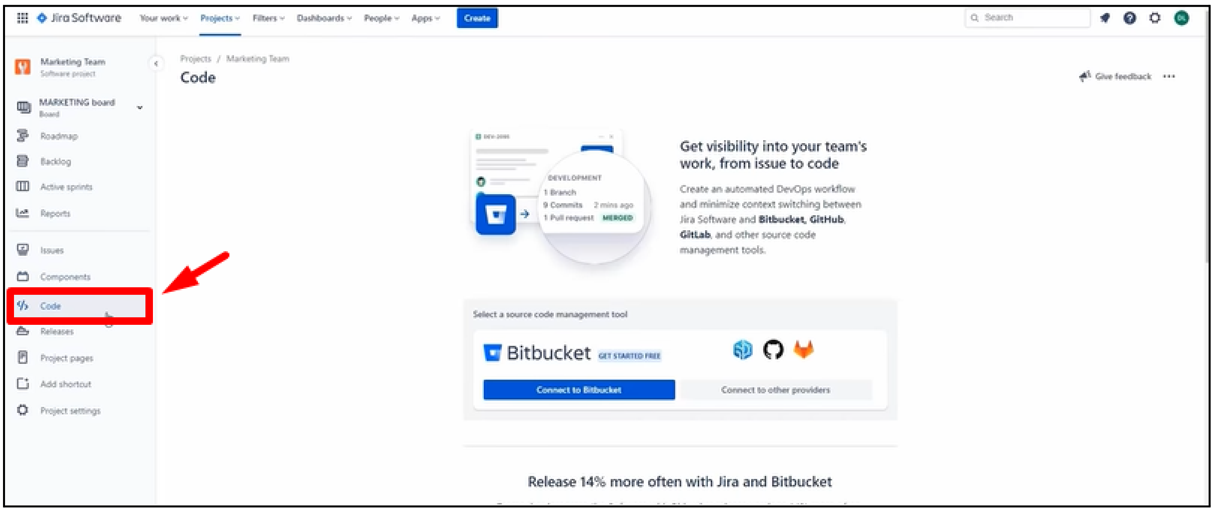




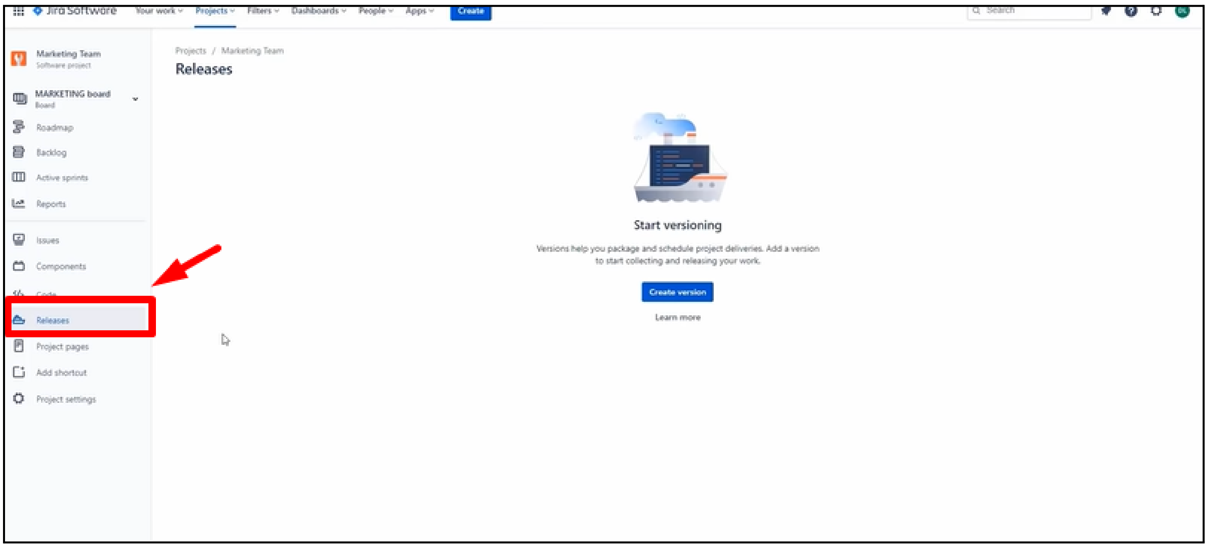
7. To group together issues that are related, click **Components**.



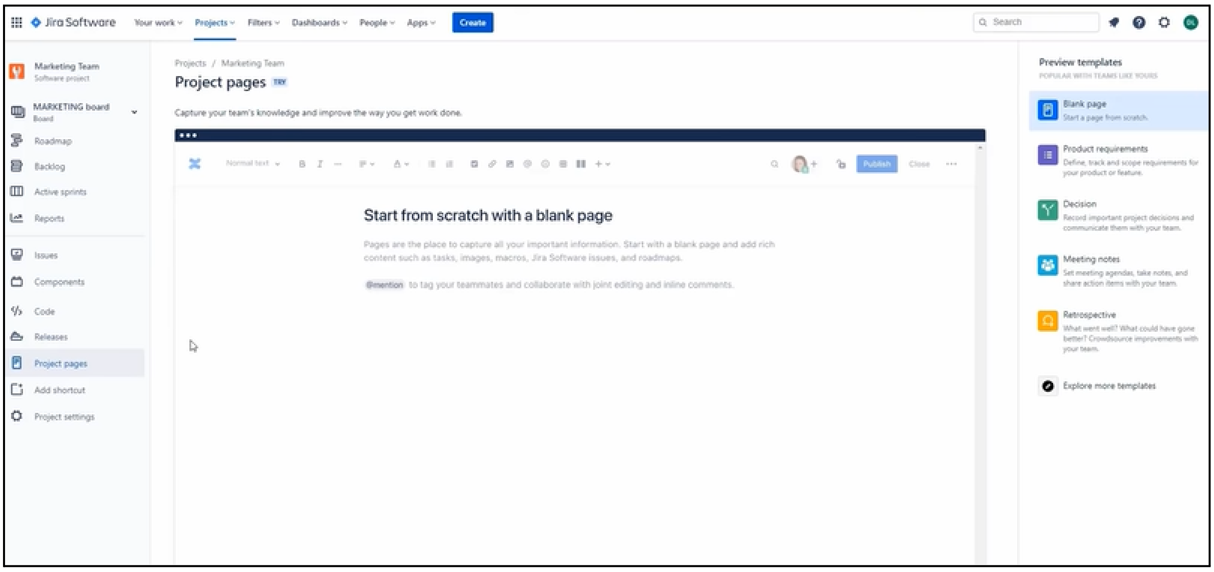
8. To link up with Bitbucket, GitHub, GitLag, click **Code**.



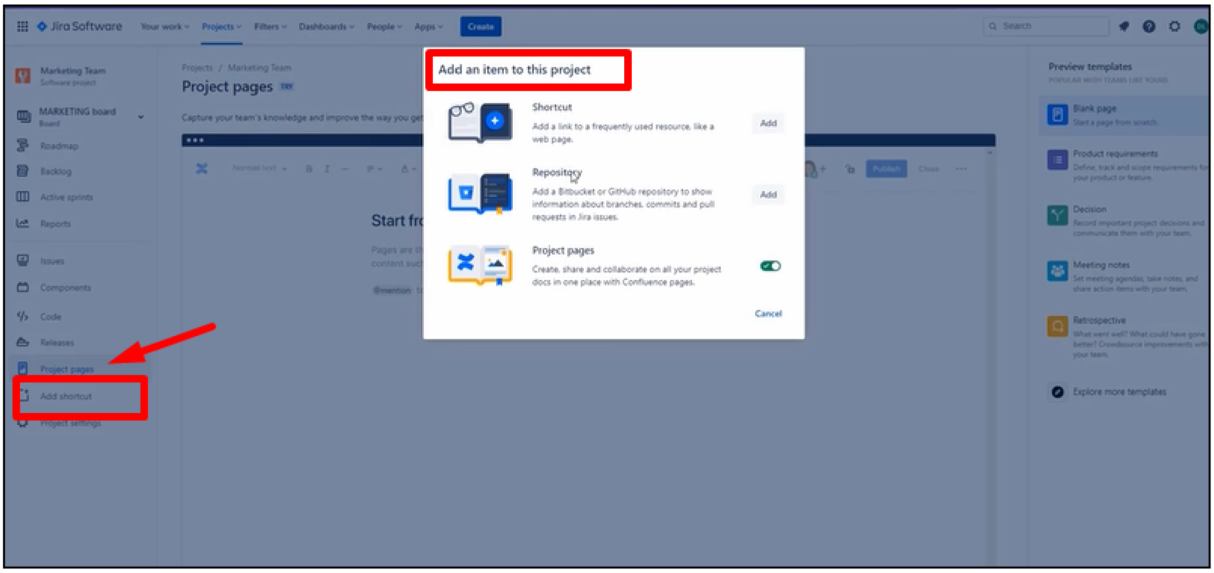
9. To see what issues, bugs, and stories were resolved in a release, click **Releases**.



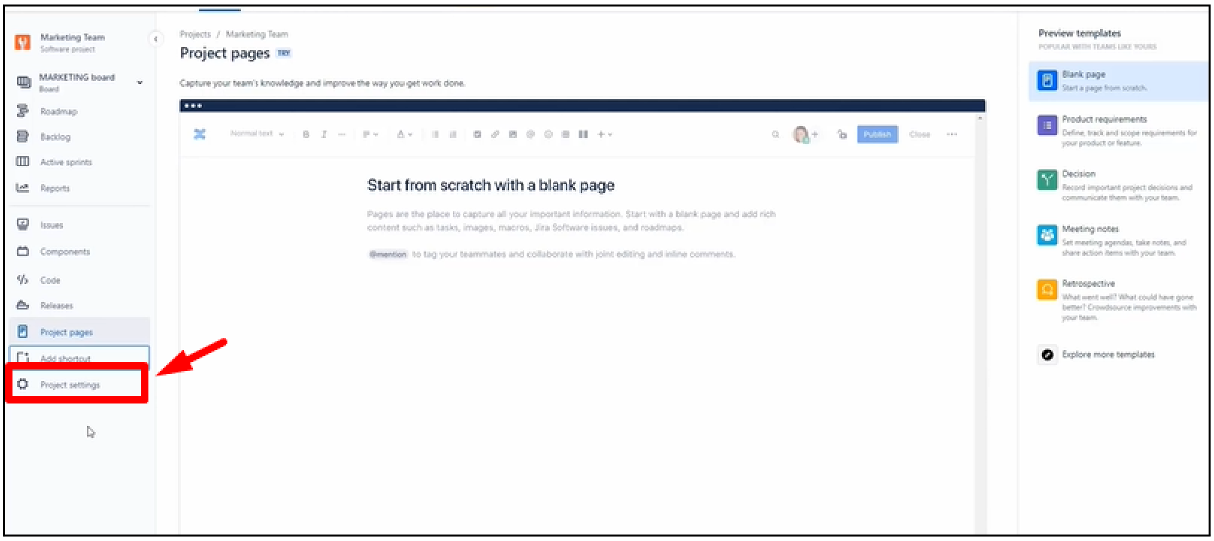
10. To have access to Confluence's project pages, click **Project pages**.

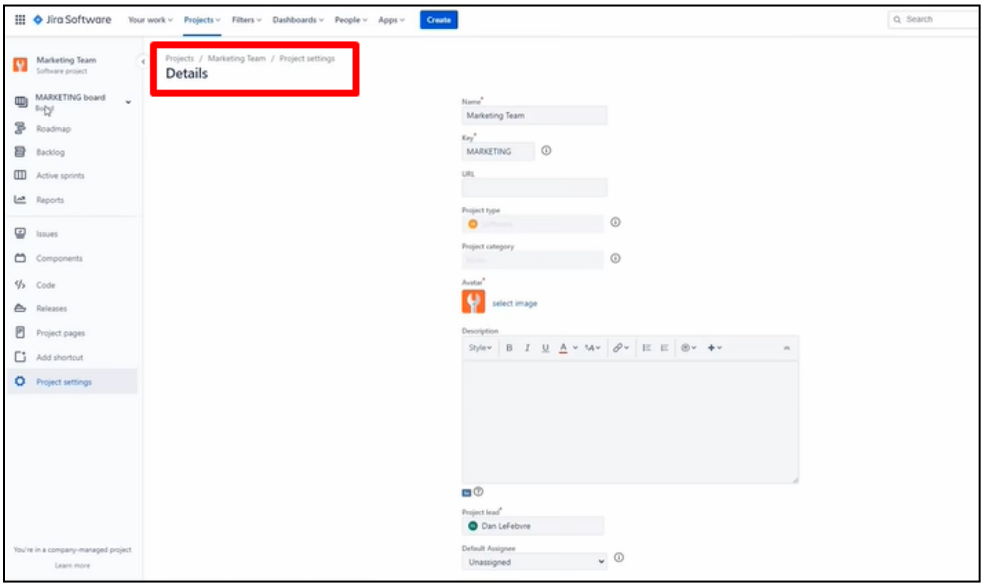


11. To add a shortcut to your repository or project pages, click **Add shortcut**.



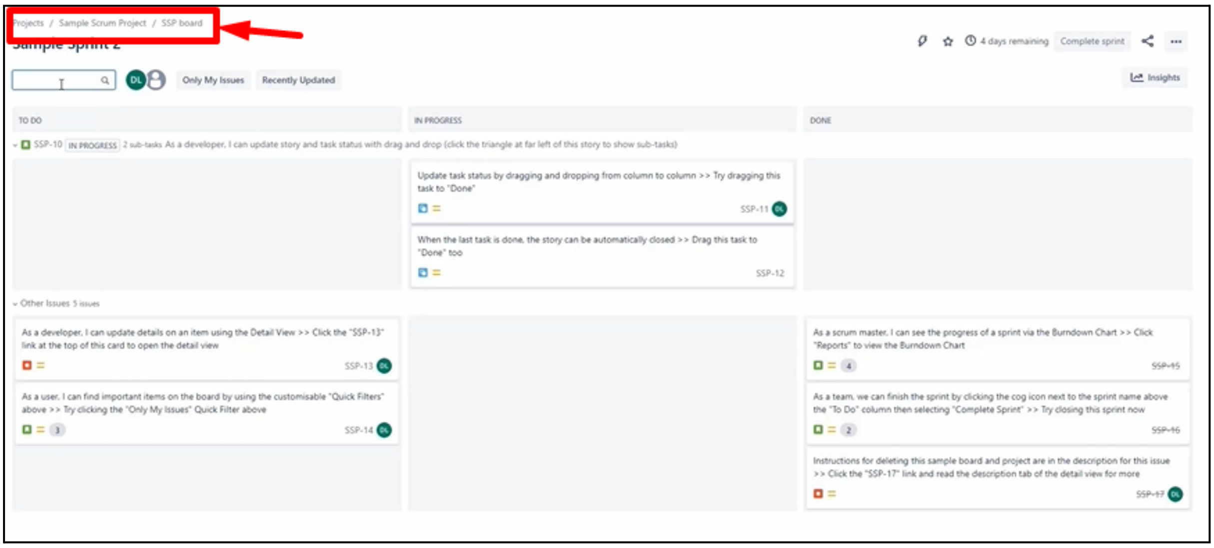
12. If you have administrative permission, click **Project changes** to introduce the necessary changes to your project.



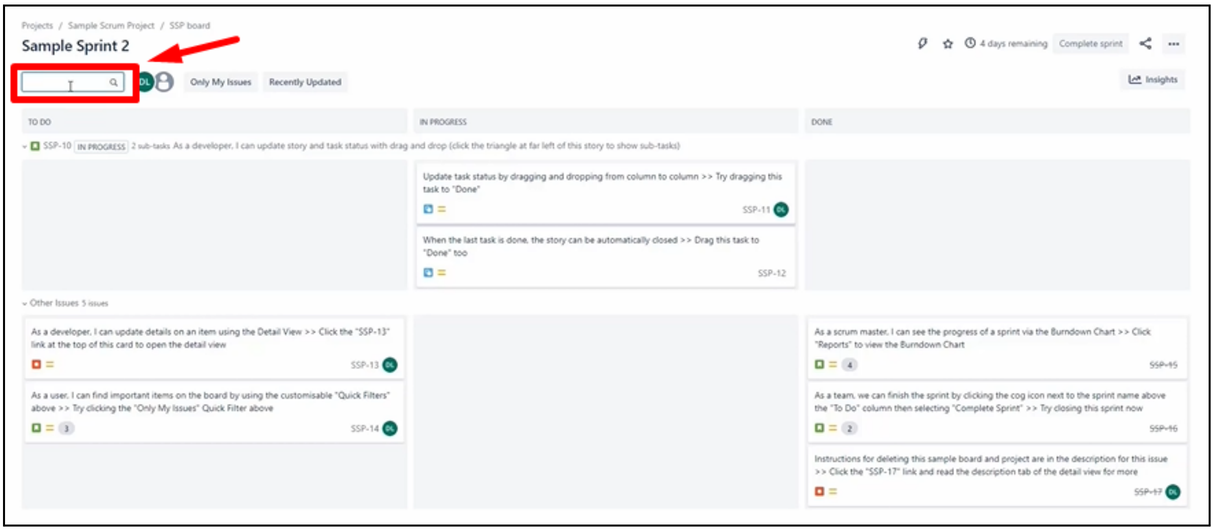


Scrum Agile board overview

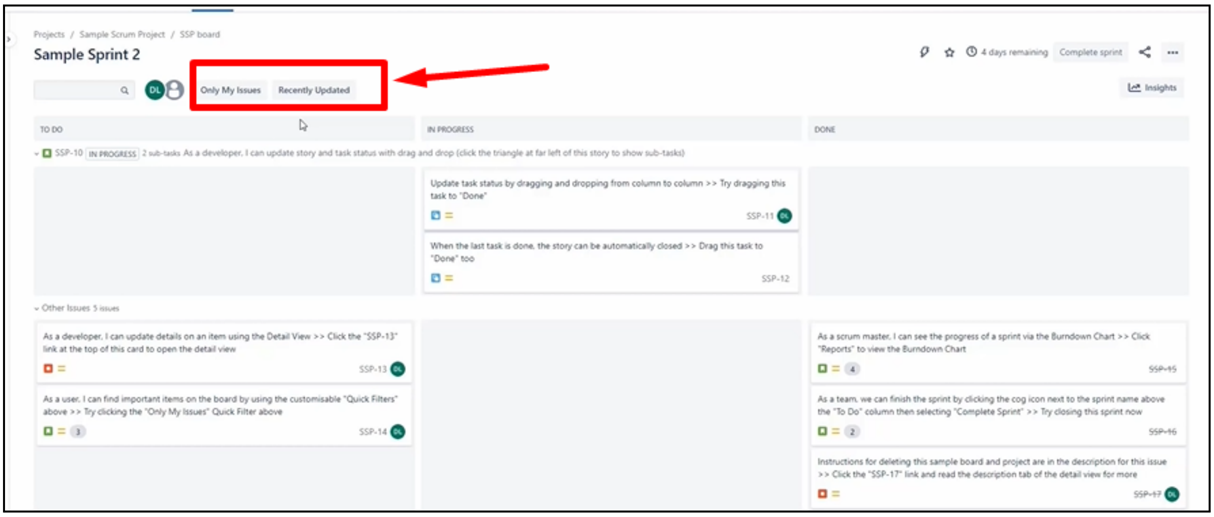
- A breadcrumb is an information about where you are in your project.



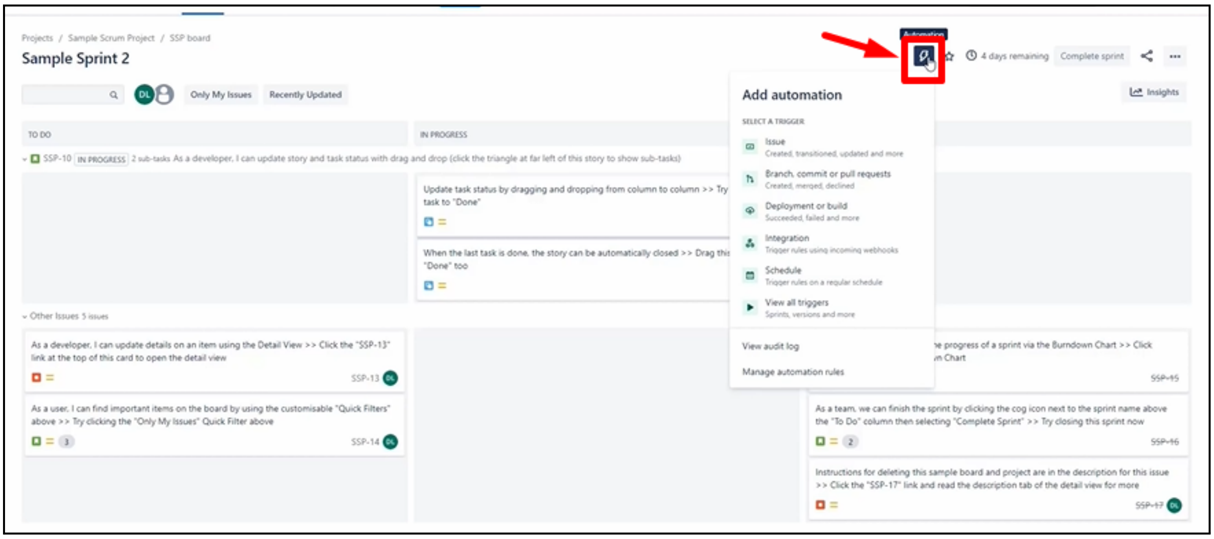
- A search is to filter your issues on the board.



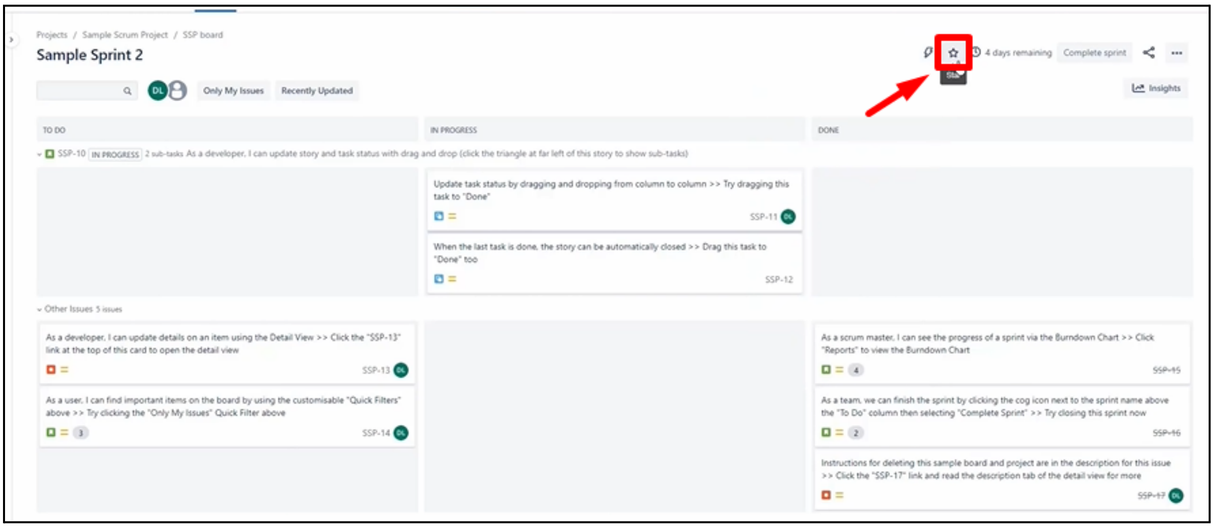
3. Fast filters as **Only My Issues**, **Recently Updated** are to have quick access to your issues (or recently updated issues).



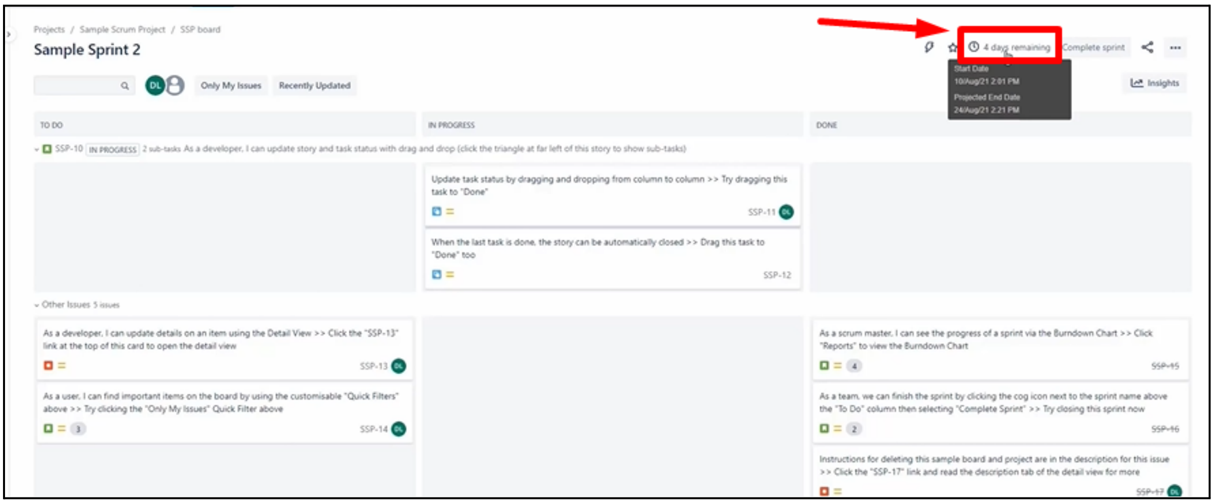
- Adding automation to the issues on the board.



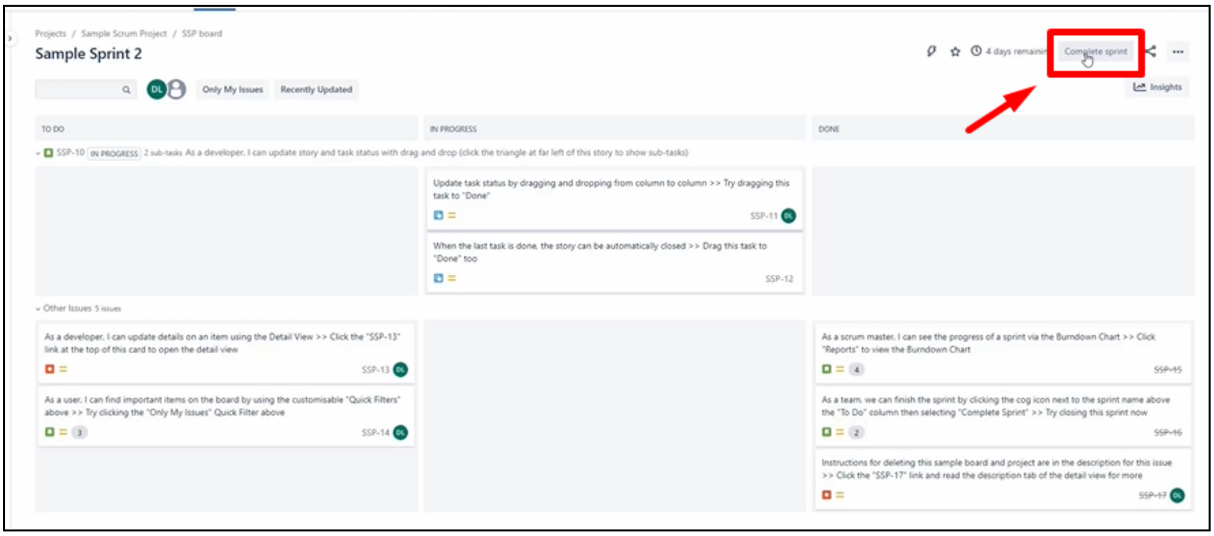
- Star is to pin your board and have quick access.



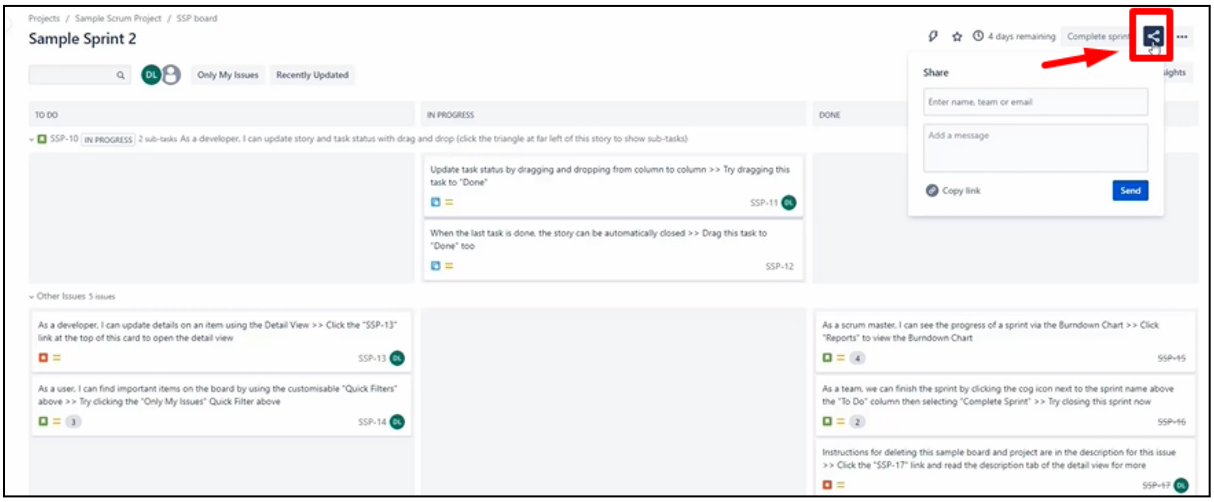
- The information on how much time has left to get all of the issues on the board completed.



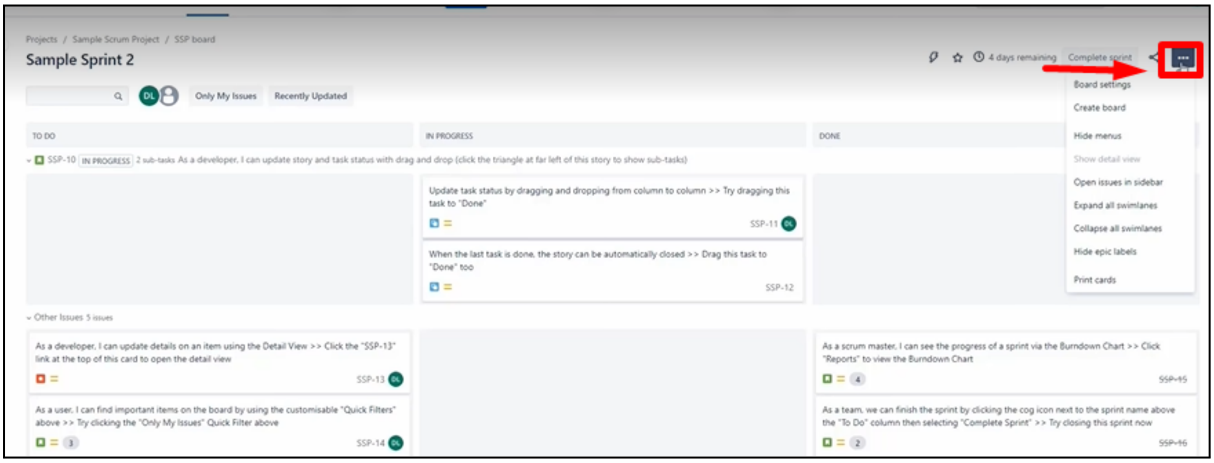
- Completing the sprint



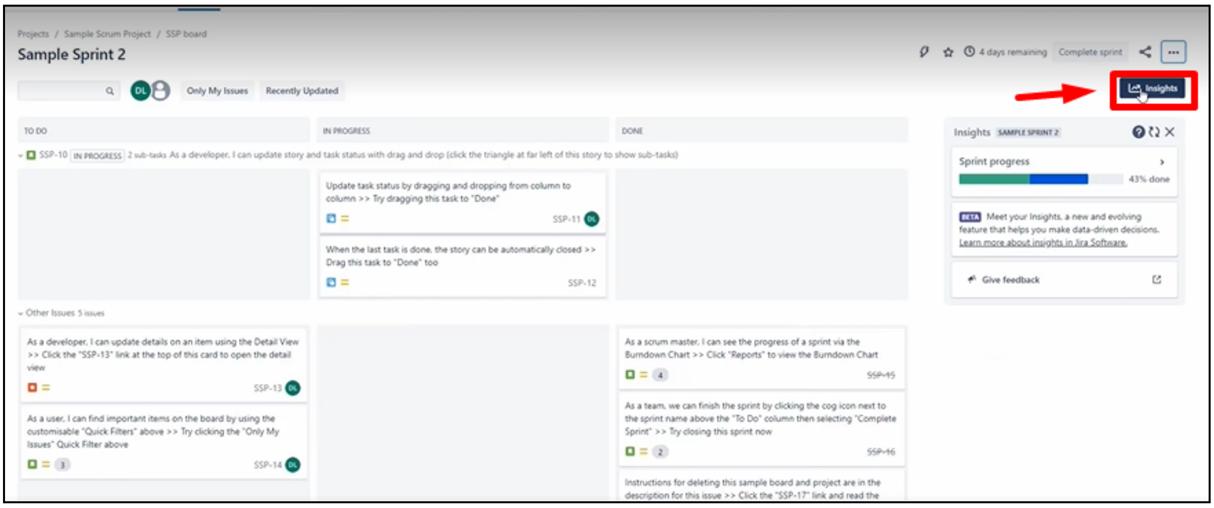
- Sharing among your team members (you cannot share to someone outside the Jira because people won't be able to see it).



- Changing settings in a Sprint (board settings, etc.).



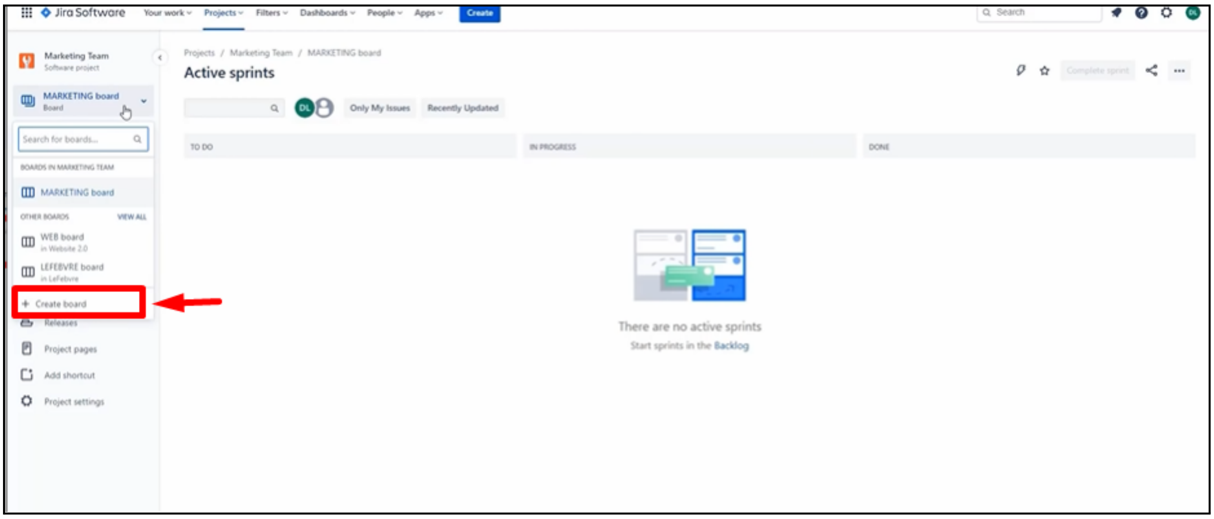
- A quick way to see the progress in your Sprint.



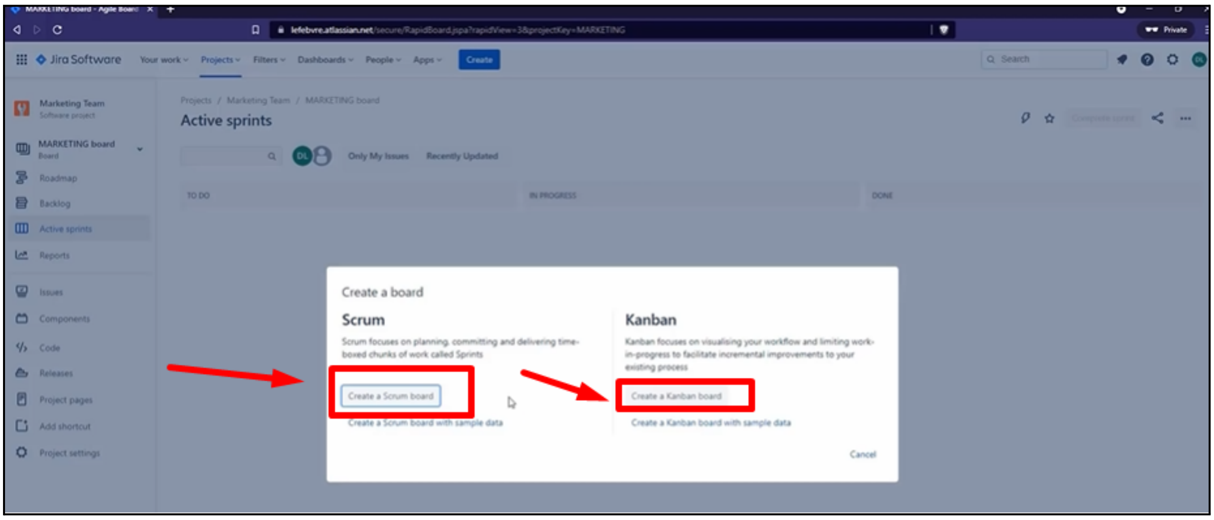
How to create a new scrum board

To create a new scrum board:

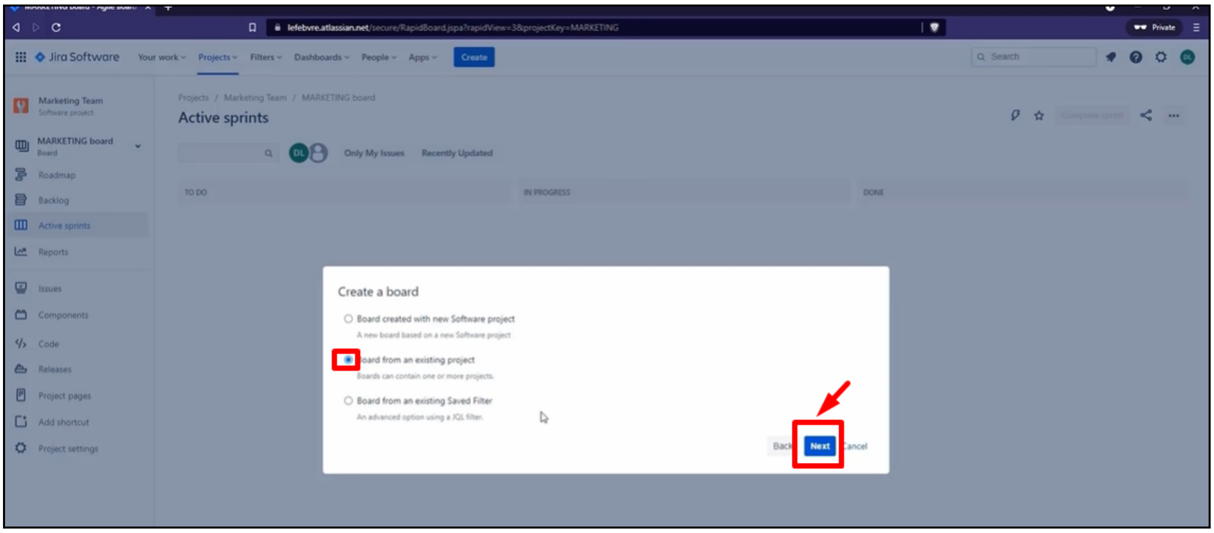
1. Click **MARKETING board** and select **Create board** from the dropdown list.



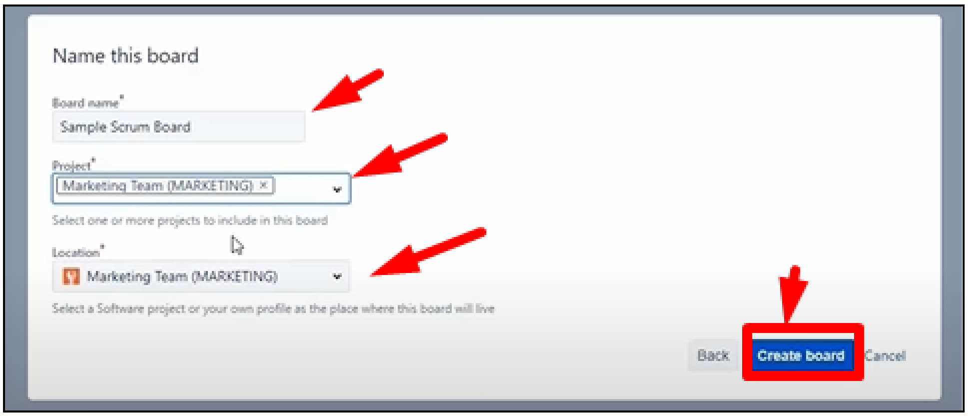
2. To create a Scrum board, click **Create a Scrum board** (but, if you want to create a Kanban board, you can also do it even if you use a Scrum project template, click **Create a Kanban board**).



3. To choose where you want to create a new Scrum project, select and click the radio button with the necessary board from the appeared list (**Board from an existing project** will be used as an example), then click **Next**.



4. In the form type your **Board name**, select **Project** and **Location** where the board will live, and **Create board**.

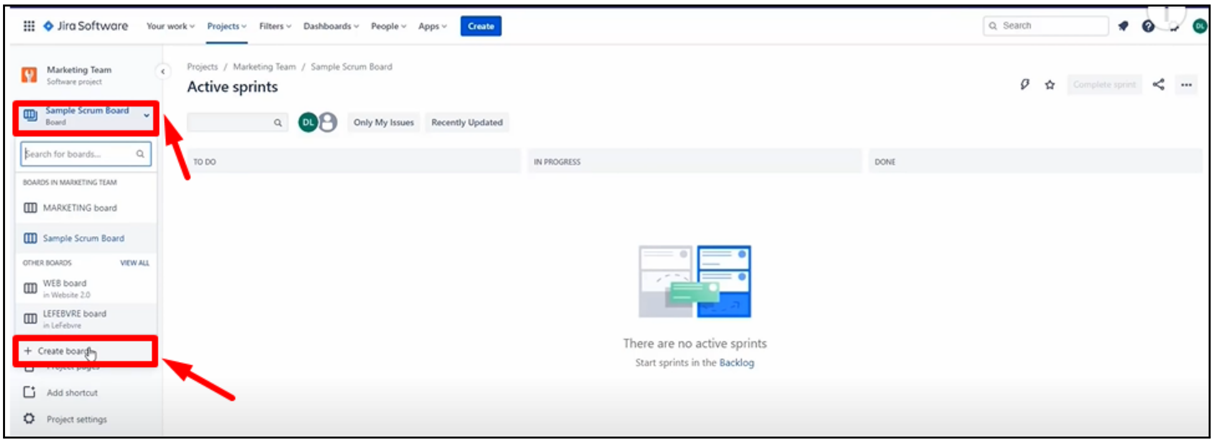


The new scrum board has been created.

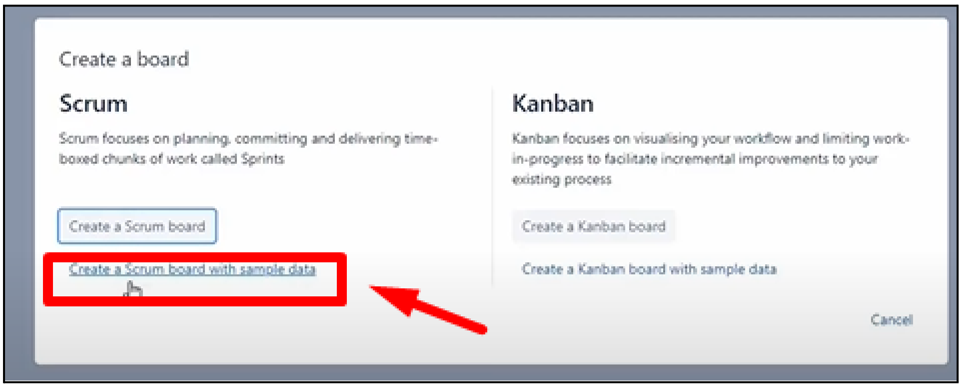
How to create a Scrum board with sample data

To create a Scrum board with sample data:

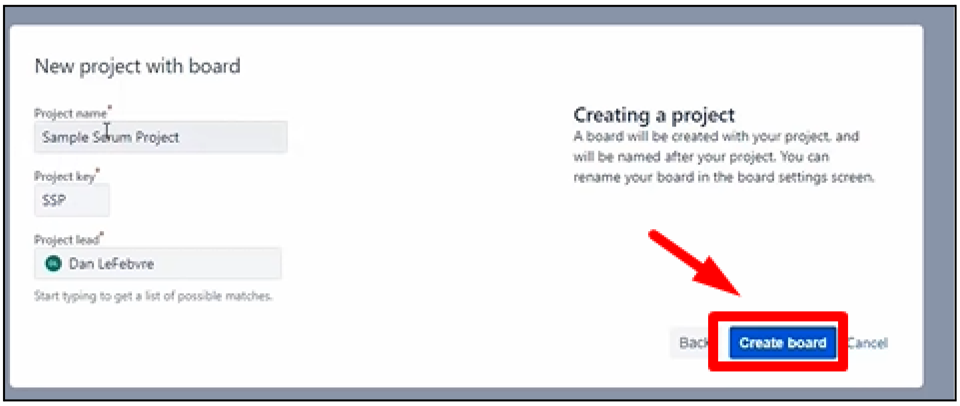
1. Click **Sample Scrum Board** and select **Create board** from the dropdown list.



2. Click **Create a Scrum board with sample data**.



3. Click **Create board** to create a sample Scrum project.



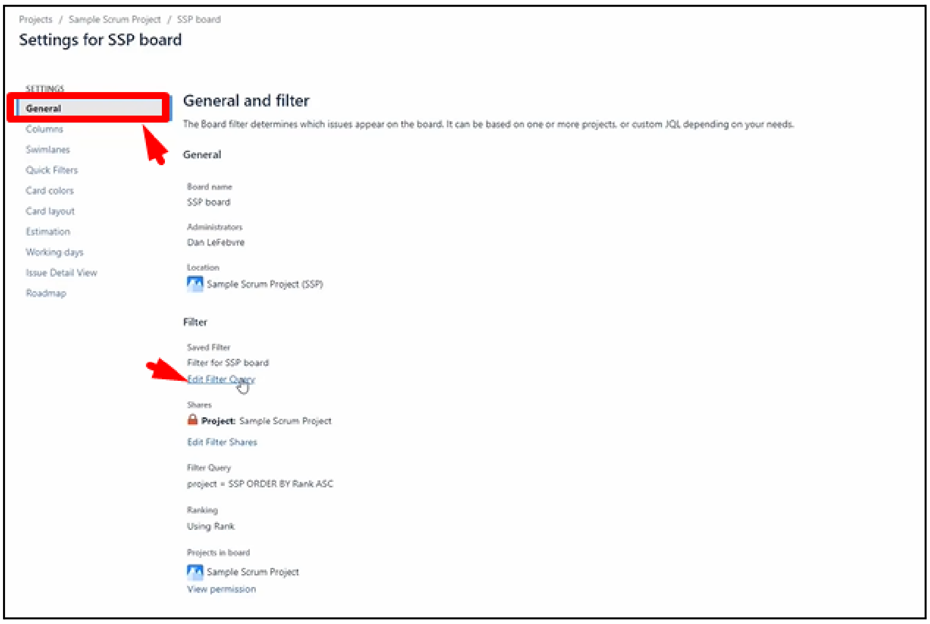
The Scrum board with sample data has been created.

How to customize scrum boards

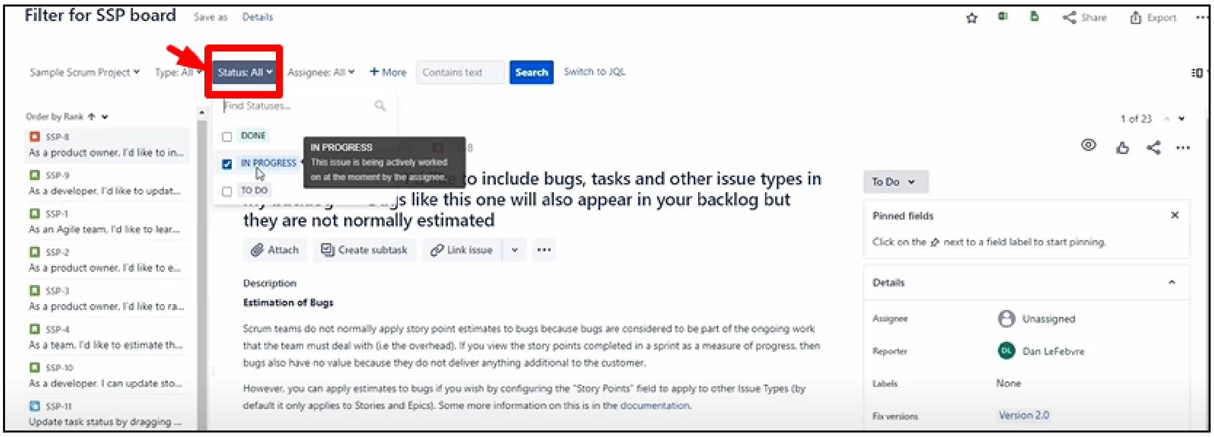
The main driver to see the issues on the board is the filter.

To filter your issues:

1. Click ··· and select **Board settings** from the dropdown list.
2. Click **General** and then click **Edit Filter Query**.



3. To change your filters click **Status All** and choose **DONE**, **IN PROGRESS**, **TO DO**.



The issues in projects have been filtered.