

# 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 work 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 uninterrupted, 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>.



The image shows a screenshot of a Jira interface. A dropdown menu is open, with the title "Issue Type\*" at the top. Inside the dropdown, there is a single option labeled "Story" with a small icon to its left. A small downward arrow indicating a dropdown is located to the right of the "Story" label.

**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.

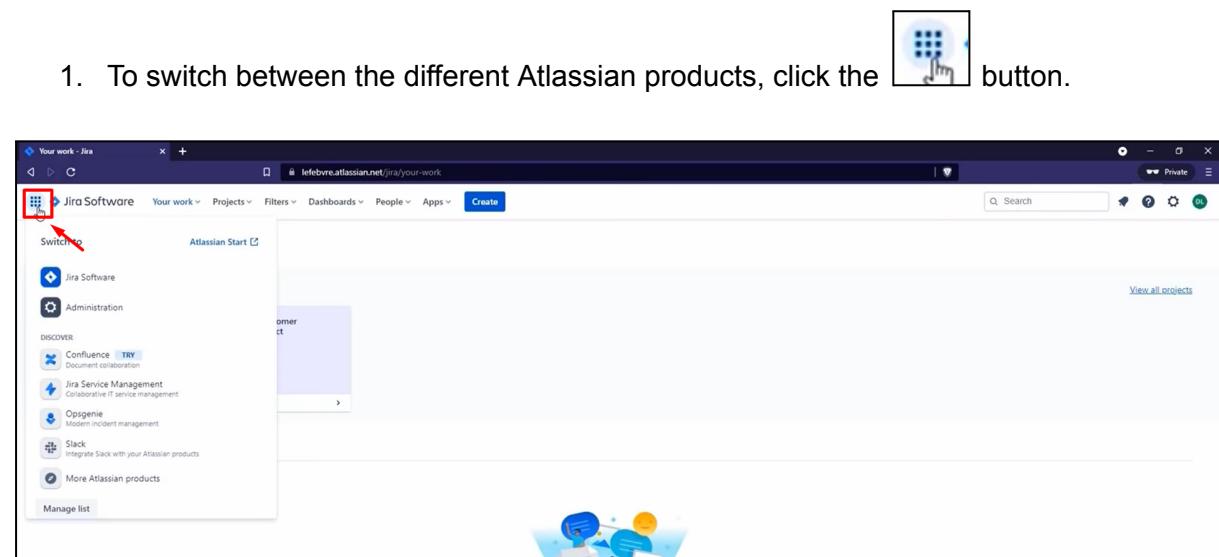
**An Epic-** is a story that is too big for a single sprint. It's broken down into multiple user stories. When those are done, the epic is complete. Epics in Jira contain multiple user stories.

## Jira terms

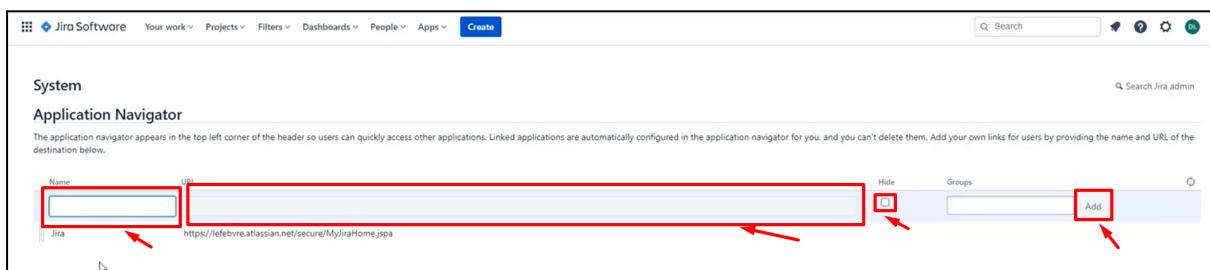
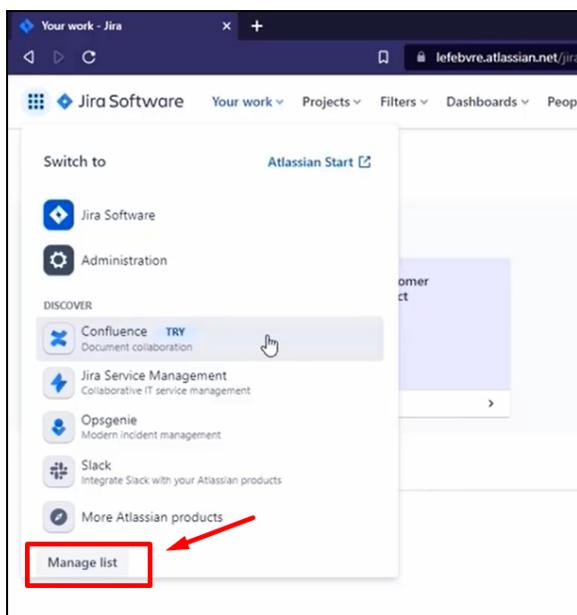
**Issues** are containers for fields and fields hold all of your data (e.g. descriptions, summary, assignee, Due Date).

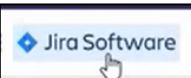
**Projects** are containers for issues that live inside your Jira projects.

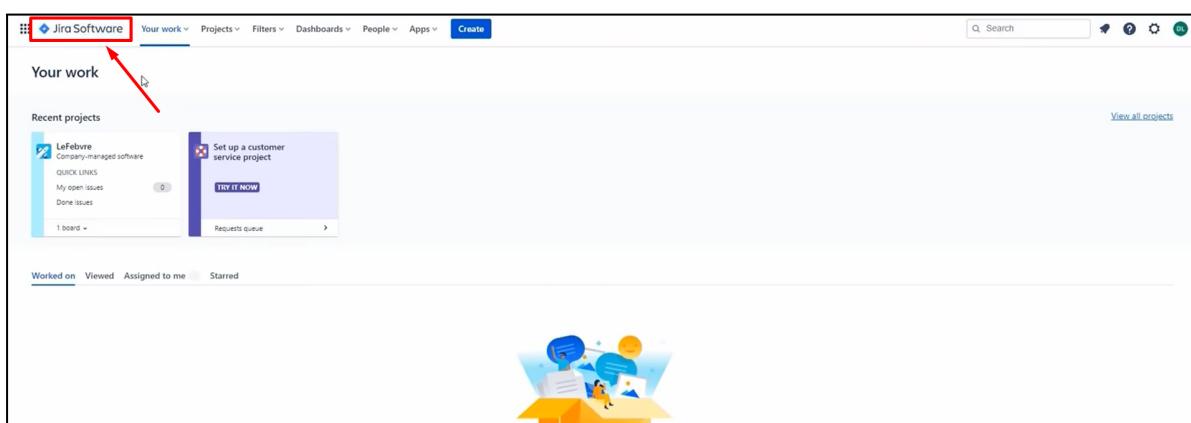
## Jira's interface



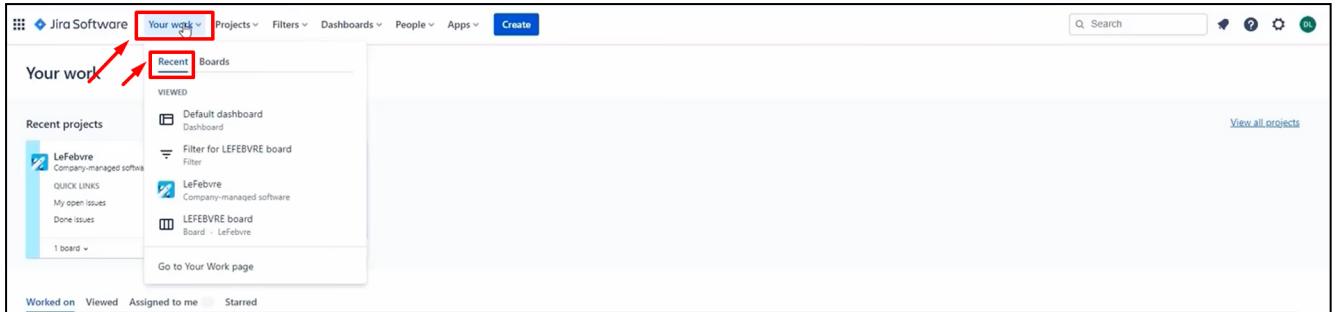
**Tip:** If you have administrative permission, you can customize the list of the products. Click **Manage list** at the bottom of the dropdown list and add different internet links, or to any specific documentation to have quick access to this inside of Jira (type the name, **URL**, check or uncheck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



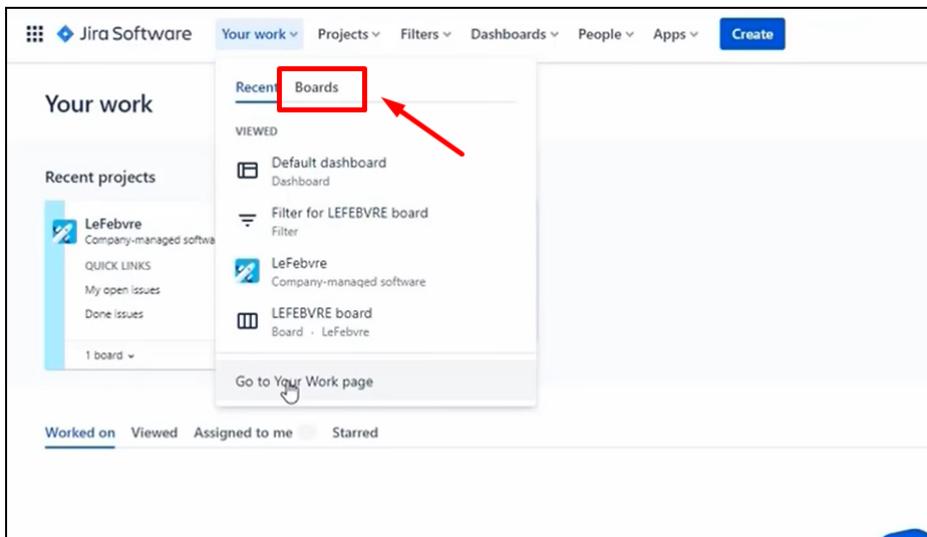
2. Click  to come back to the home page.



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



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



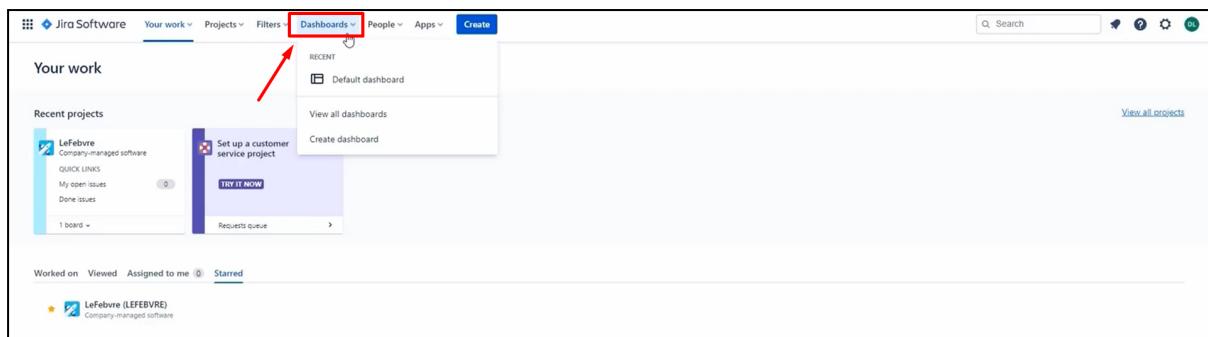
5. To access or create your projects, click the **Projects** button.



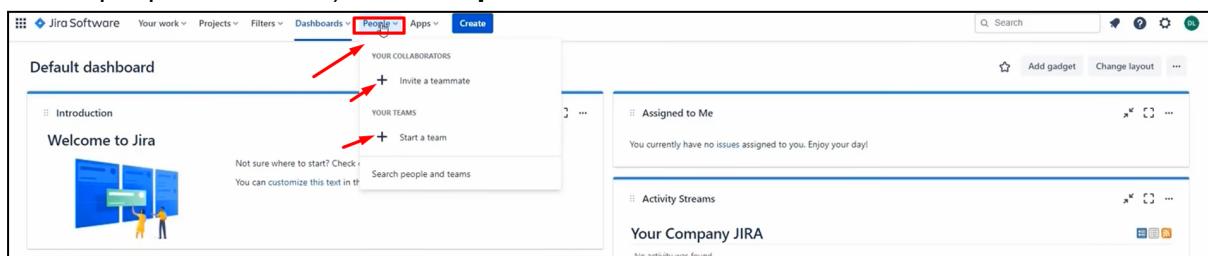
6. To access or build your filters, click **Filters**.



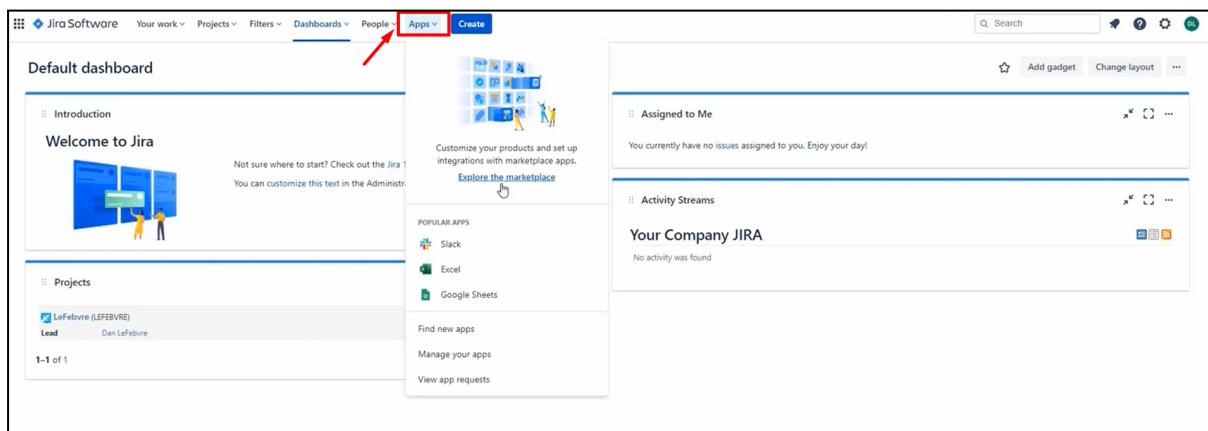
7. To see the things you are working on and be able to share them with users, click **Dashboards**.



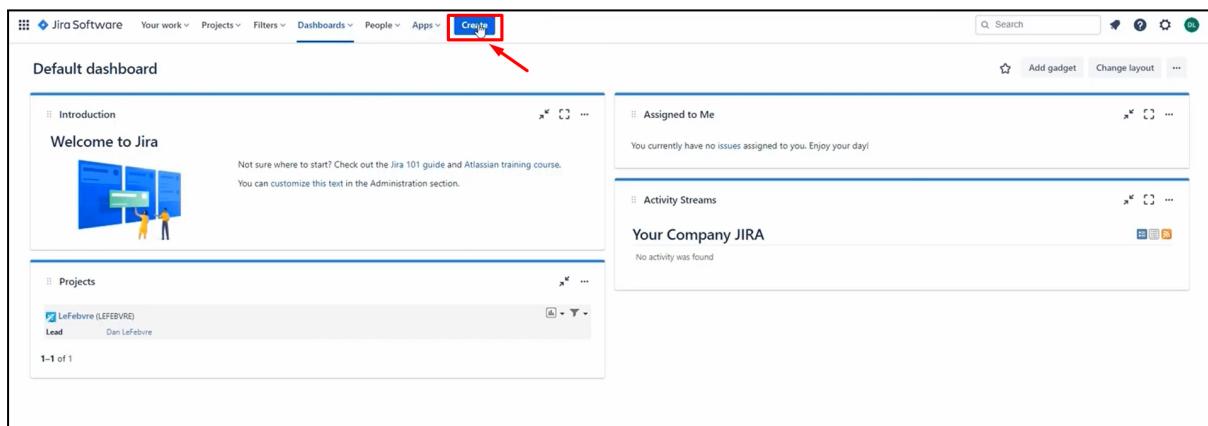
8. To find people in your organization (e.g. invite a teammate, start a team, search people and teams), click **People**.



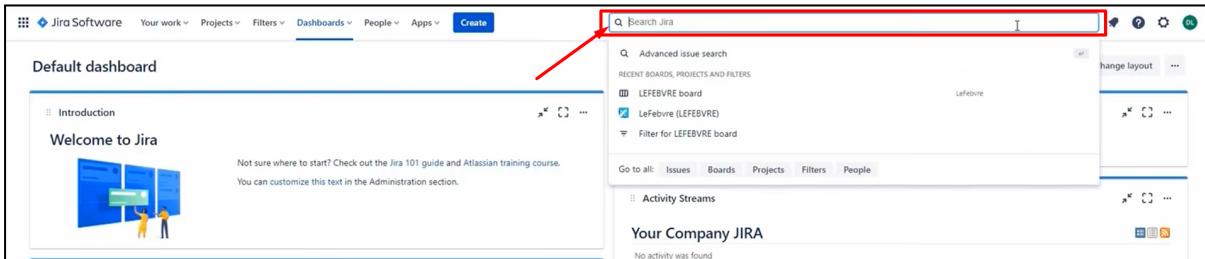
9. To add any other functionalities to Jira (e.g. Excel, Stack, Google Sheets), click **Apps**.



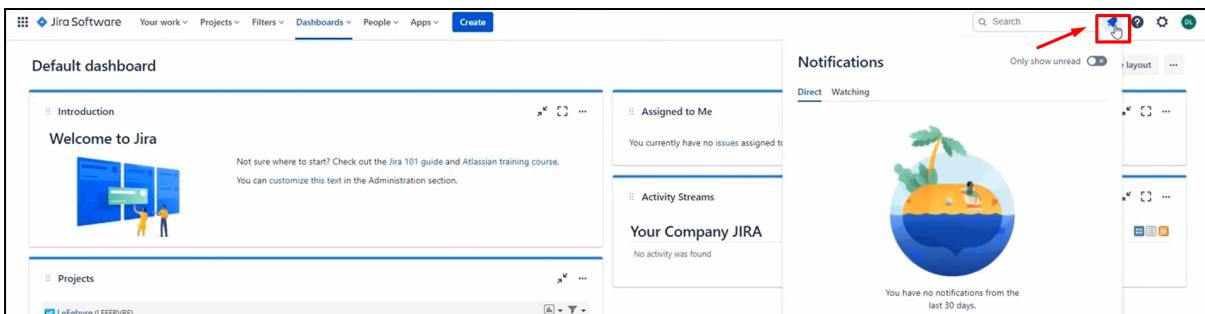
10. To create a new issue, click the **Create** button.



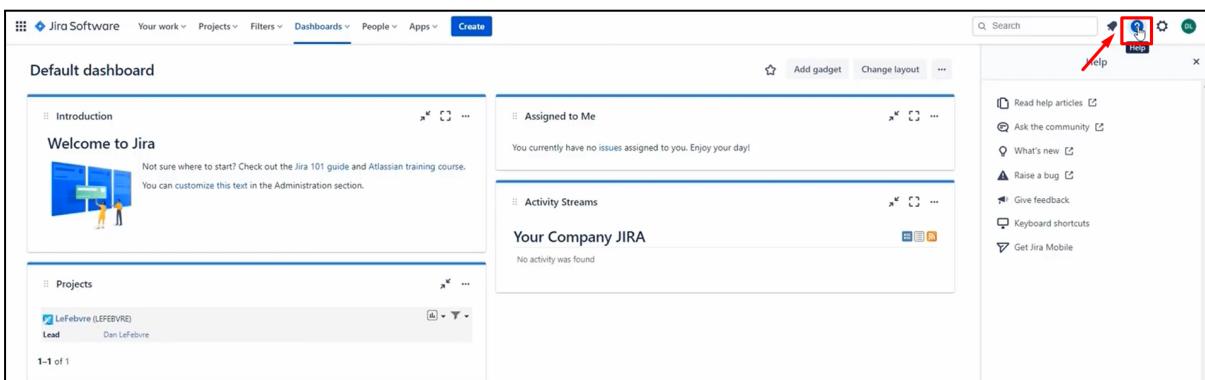
11. To search for issues, click the search box at the top-right of the screen.



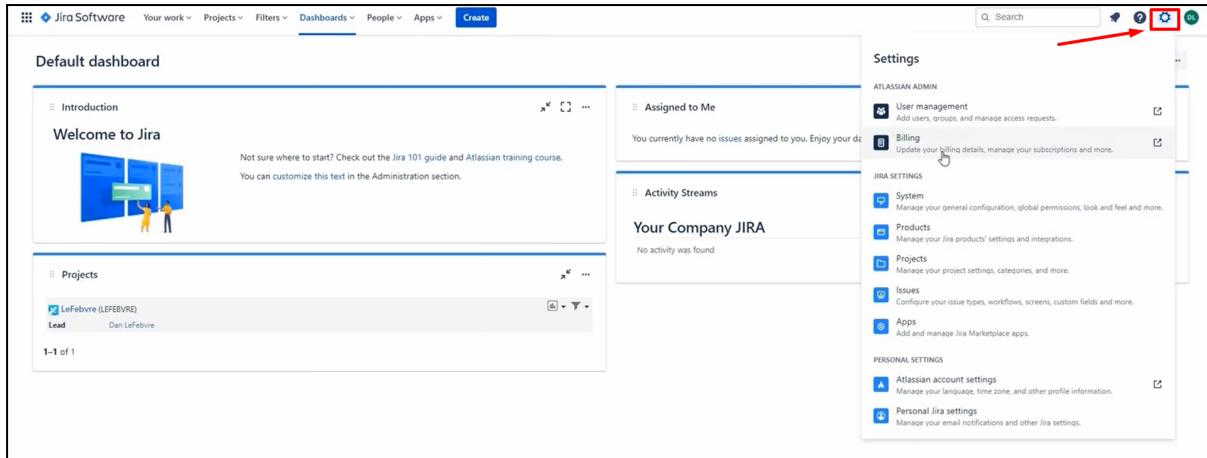
12. Click the notification icon to see your notifications (e.g. when somebody comments on your issue, watching, or tags your user name).



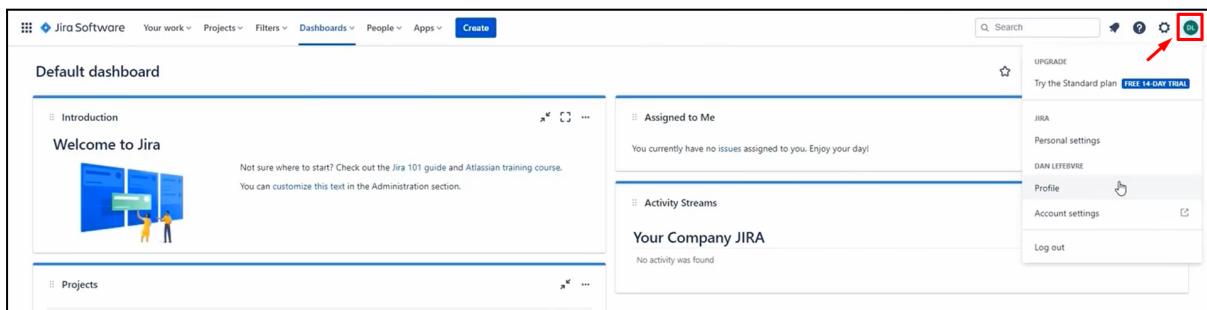
13. To have some explanations and answers to your questions click the  icon.



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

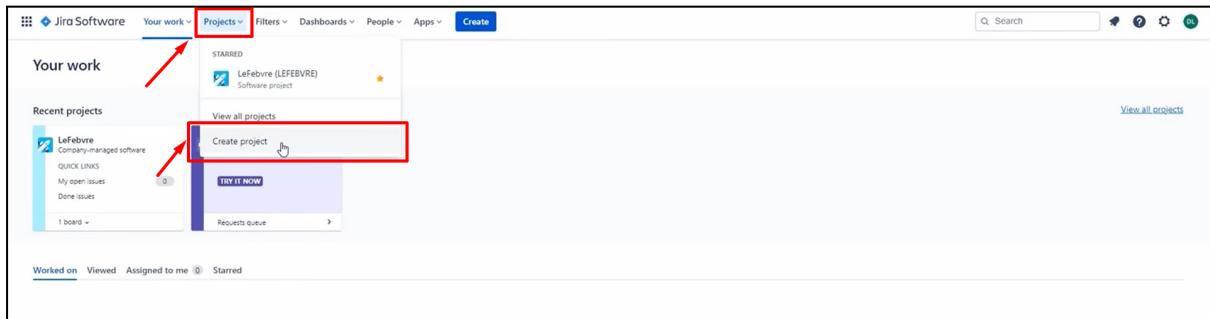
**Team-managed projects** were introduced in 2018 as ‘Next-gen projects’ and then they were renamed in 2021 to Team-managed projects. Team-managed projects don’t require admin permission to create them because all entities (e.g. issue types, statuses, resolutions, etc.) live inside the project. Team-managed 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.

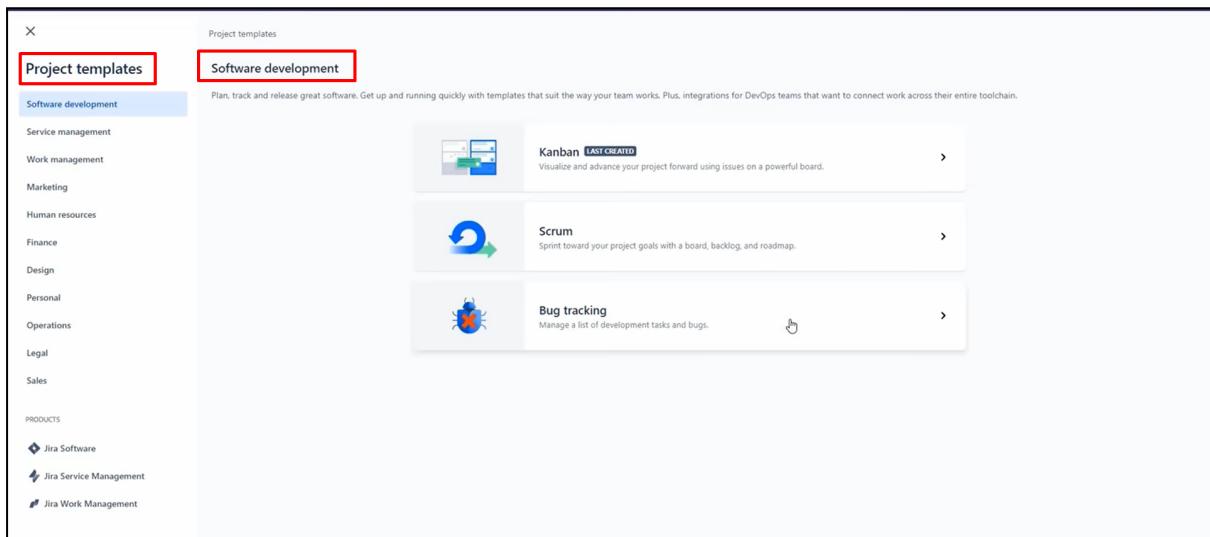
# How to create a team-managed project

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).

**Kanban**

Use template X

Kanban (the Japanese word for “visual signal”) is all about helping teams visualize their work, limit work currently in progress, and maximize efficiency. Use the Kanban template to increase planning flexibility, reduce bottlenecks and promote transparency throughout the development cycle.

PRODUCT Jira Software

RECOMMENDED FOR Teams that control work volume from a backlog DevOps teams that want to connect work across their tools

ISSUE TYPES Epic Story Bug Task Sub-task

WORKFLOW TO DO IN PROGRESS DONE

**Track work using a simple board**



Work items are represented visually on your kanban board, allowing teams to track the status of work at any time. The columns on your board represent each step in your team's workflow, from to-do to done.

[Learn more about kanban boards](#)

**Use the board to limit work in progress**



Set the maximum amount of work that can exist in each status with work in progress (WIP) limits. By limiting work in progress, you can improve team focus, and better identify inefficiencies and bottlenecks.

[Learn more about WIP limits](#)

**Continuously improve with agile reports**



One of the key tenets of kanban is optimizing flow for continuous delivery. Agile reports, like the cumulative flow diagram, help ensure your team are consistently delivering maximum value back to your business.

[Learn more about agile metrics](#)

Next: Select a project type Use template

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

**Kanban**

Use template X

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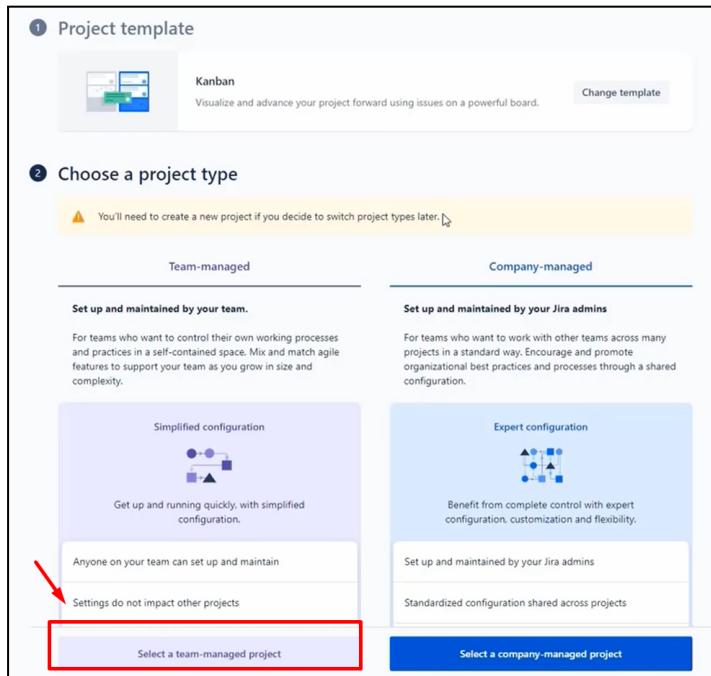
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[Learn more about agile metrics](#)

Next: Select a project type **Use template**

A red arrow points to the "Use template" button at the bottom of the page.

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**.

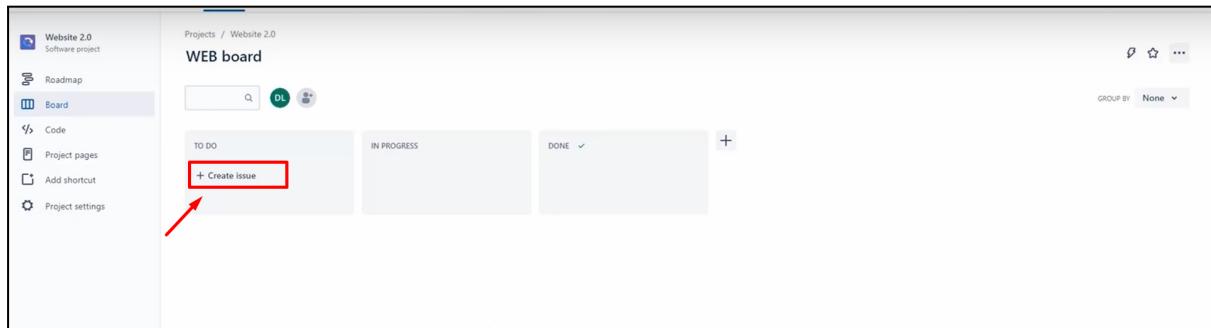
The screenshot shows the 'Add project details' form. It includes fields for 'Name\*' (empty and highlighted with a red box), 'Key' (empty and highlighted with a red box), and a checkbox for 'Connect repositories, documents, and more' (unchecked and highlighted with a red box). There are also sections for 'Template' (set to 'Kanban') and 'Type' (set to 'Team-managed'). At the bottom, there are 'Cancel' and 'Create project' buttons, with a red arrow pointing to the 'Create project' button.

The team-managed project is created.

# How to navigate team-managed projects

To navigate team-managed projects:

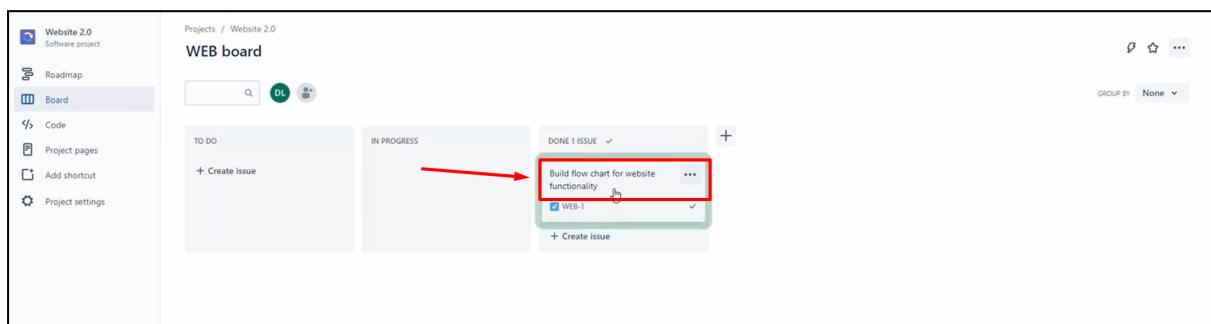
1. Click **Create issue**.



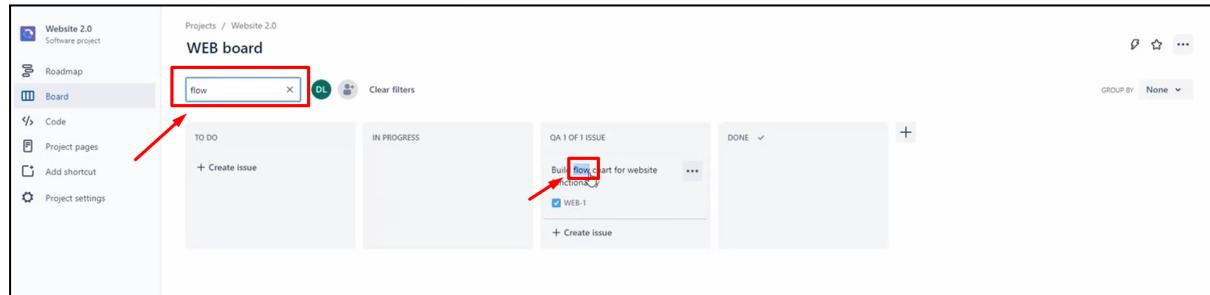
2. Type your issue into the **to do list**.



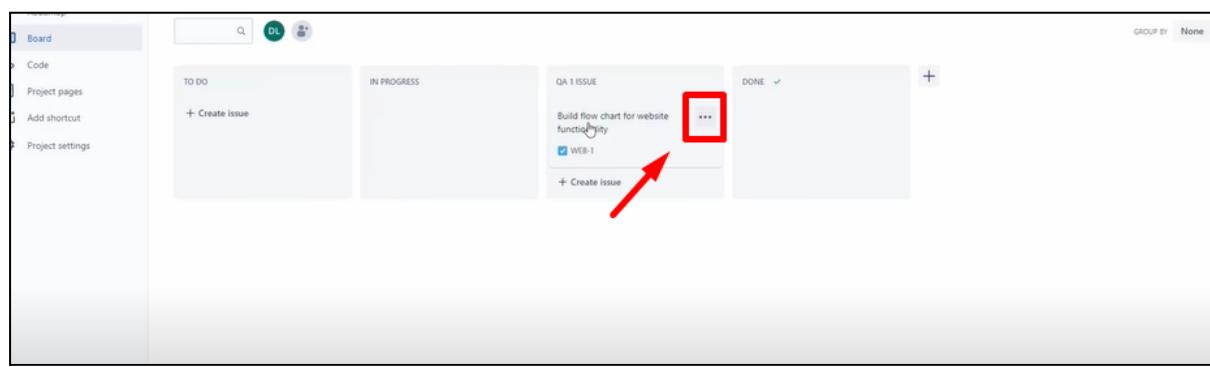
3. Drag the issue throughout the different columns (from left to right as work is completed).



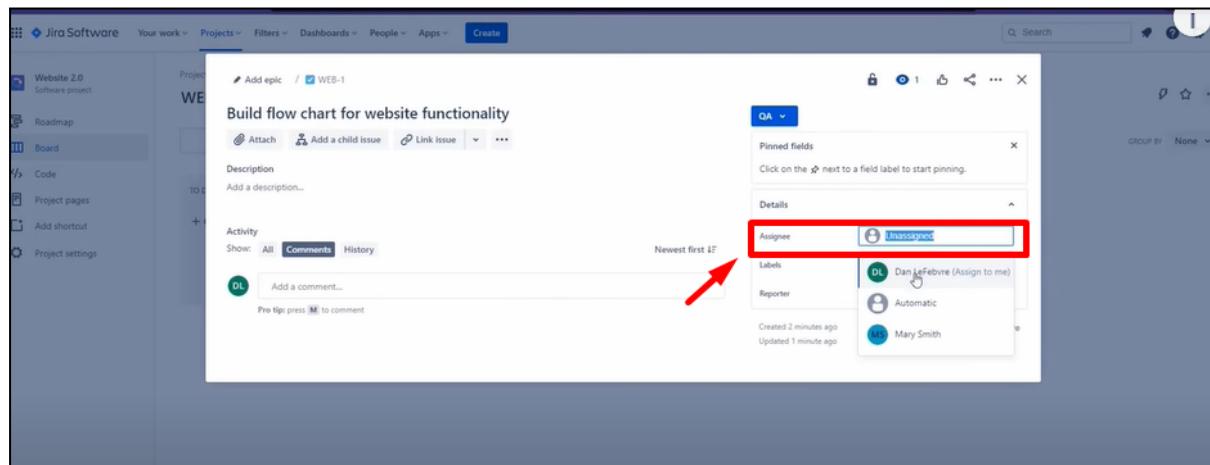
4. To filter issues, click the search box at the left of the screen.



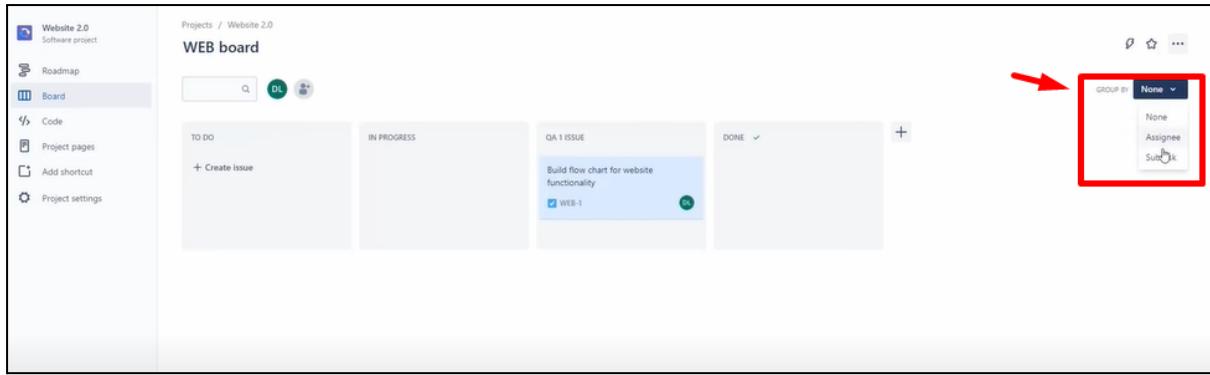
5. To assign an issue click the icon.



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.

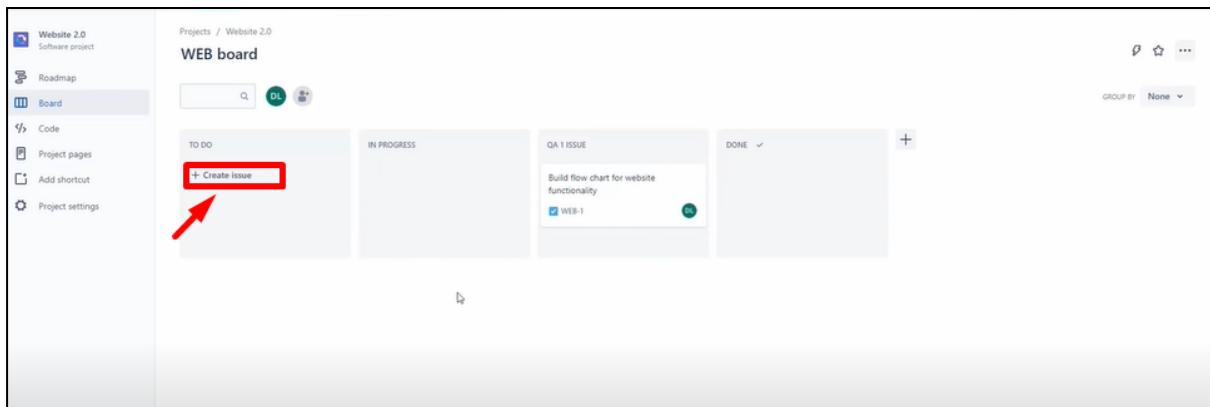


## How to create issues in team-managed projects

To create issues in team-managed projects:

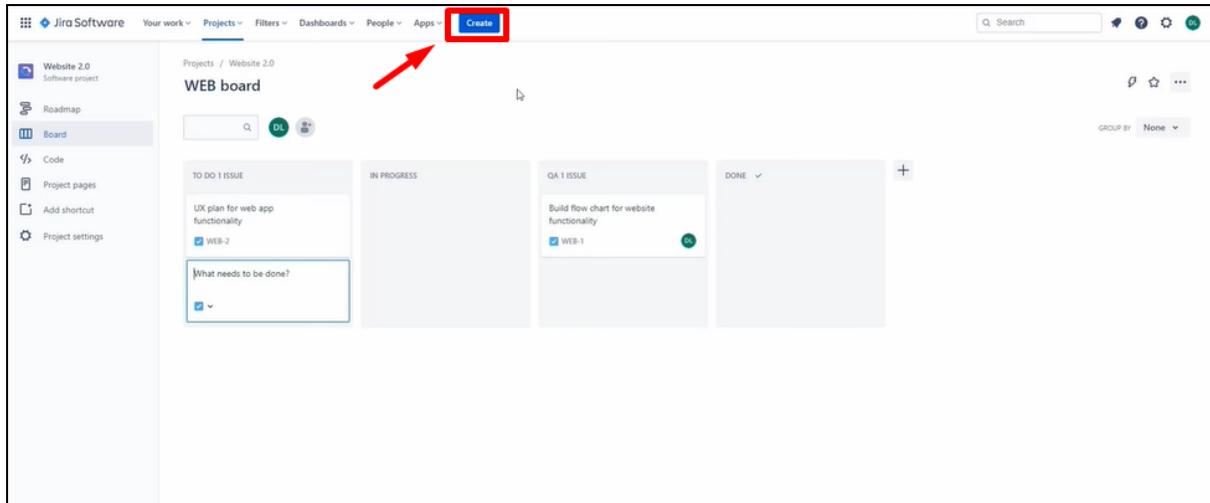
*The first way is:*

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

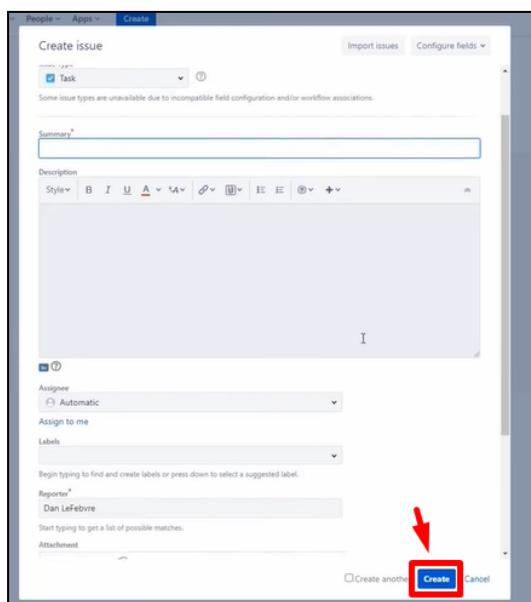


*The second way is:*

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**.

Jira Software interface showing the WEB board. The sidebar on the left includes links for Website 2.0, Roadmap, Board, Code, Project pages, Add shortcut, and Project settings. A red box highlights the 'Project settings' link, and a red arrow points to it from below.

## 2. Click **Add issue type**.

Jira Software interface showing the 'Issue types' configuration page for the 'Task' issue type. The sidebar shows 'Issue types' with 'Task' selected. A red box highlights the '+ Add issue type' button, and a red arrow points to it from below.

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

Jira Software interface showing the 'Add issue type' dialog box. The dialog lists 'SUGGESTED' issue types: 'Bug' (selected) and 'Story'. A red box highlights the 'Create issue type' button at the bottom right of the dialog, and a red arrow points to it from below.

## 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.).

The screenshot shows the 'Issue types' configuration for a 'Bug' issue type in Jira. On the left, there's a sidebar with 'Issue types' listed: Epic, Bug, Idea, Task, Subtask, and an option to 'Add issue type'. The 'Bug' item is selected. The main area shows 'Description fields' (Summary, Description) and 'Context fields' (Status, Location on Site, Assignee, Labels, Reporter). On the right, a 'Fields' section is highlighted with a red box and a red arrow pointing to it. It contains a heading 'Fields capture and display the information people need to carry out your project's work.' and a sub-section 'CREATE A FIELD' with a grid of field types: Short text, Paragraph, Date, Number, Time stamp, Labels, Dropdown, Checkbox, and People. Below this, there's a section titled 'PREVIOUSLY-CREATED FIELDS' with options like Priority, Due date, Original estimate, Environment, and Time tracking.

## How to change the details of your issue

To change the details of your issue:

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

The screenshot shows the 'Details' page for the 'Website 2.0' project in Jira. The sidebar on the left has a 'Project settings' section with 'Details' highlighted, indicated by a red arrow. The main content area shows project details: Name (Website 2.0), Key (WEB), Category (Choose a category), Project lead (Dan LeFebvre), and Default assignee (Unassigned). There are also sections for Change icon, Choose a category, and Make sure your project lead has access to issues in the project.

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.

Details

Name  
Website 2.0

Key  
WEB

Category  
Choose a category

Project lead  
Dan LeFebvre

Default assignee  
Project lead

Save

The details of your issue have been changed.

## How to customize the board

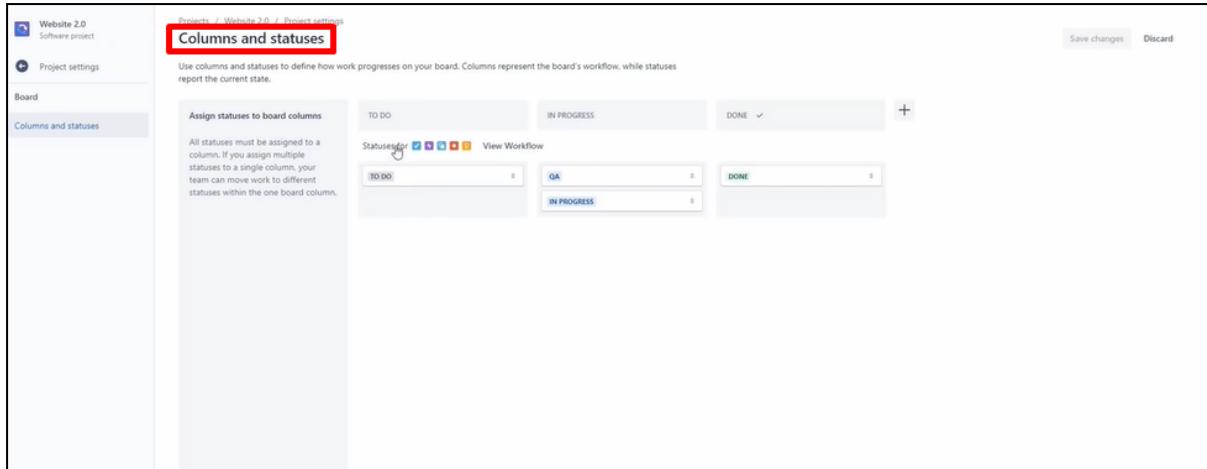
To customize the board:

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

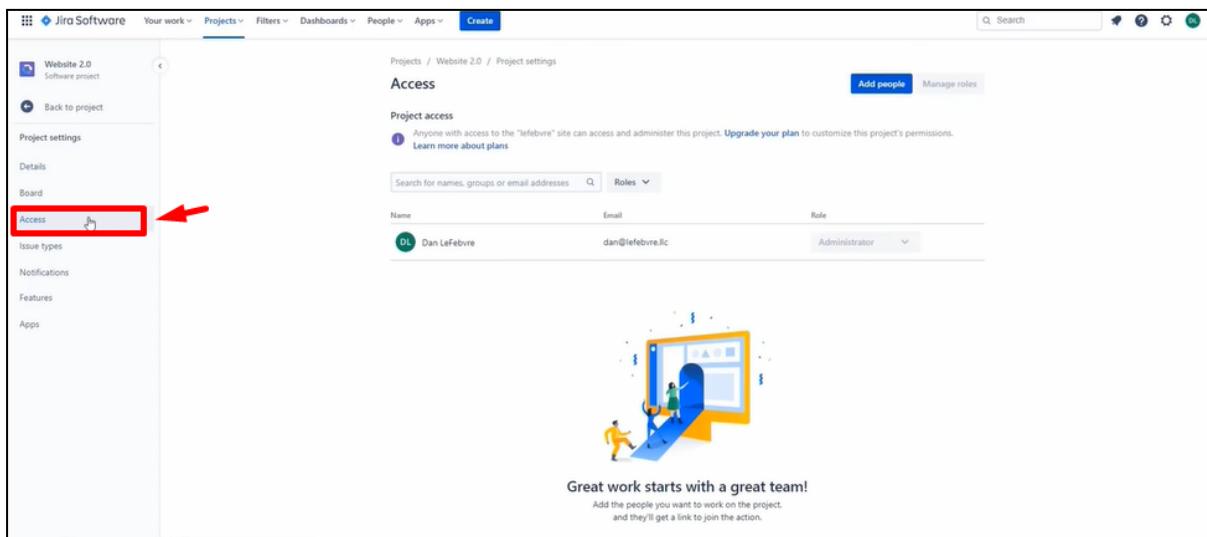
Project settings

- Details
- Board**
- Access
- Issue types
- Notifications
- Features
- Apps

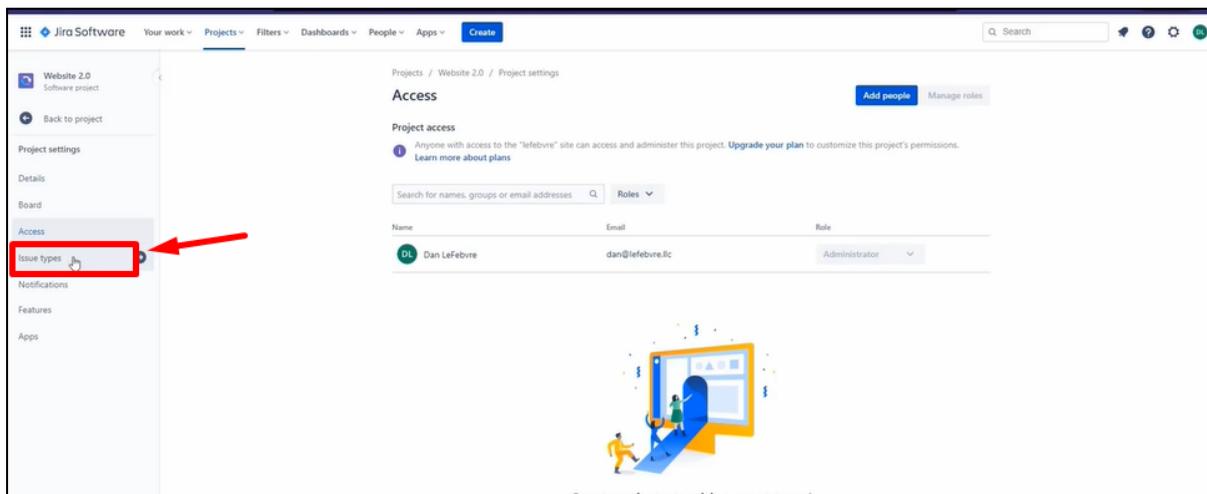
2. In the section **Columns and statuses** you can drag your issues between to do/in progress/done and change their statuses.



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.

Jira Software Project settings - Notifications

Notifications

Email

Event Recipient Actions

Event	Recipient	Actions
Issue Created	All Watchers, Current Assignee, Reporter	...
Issue Updated	All Watchers, Current Assignee, Reporter	...
Issue Assigned	All Watchers, Current Assignee, Reporter	...
Issue Deleted	All Watchers, Current Assignee, Reporter	...
Issue Moved	All Watchers, Current Assignee, Reporter	...
Issue Commented	All Watchers, Current Assignee, Reporter	...
Issue Comment Edited	All Watchers, Current Assignee, Reporter	...
Work Logged On Issue	All Watchers, Current Assignee, Reporter	...
Issue Worklog Updated	All Watchers, Current Assignee, Reporter	...
Issue Workflow Transitions	All Watchers, Current Assignee, Reporter	...

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

Jira Software Project settings - Features

Planning

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

Reports

Analyze and track your team's work by reporting on the project's activity. Learn more about Reports

Issue navigator

Browse a list of issues in your project. Use the built-in filters and text search to find issues

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

Jira Software Default dashboard

People > Apps > Create

Default dashboard

Welcome to Jira

Not sure where to start? Check out the Jira 101 guide. You can customize this text in the Administer section.

Explore the marketplace

POPULAR APPS

- Slack
- Excel
- Google Sheets

Find new apps

Manage your apps

View app requests

Assigned to Me

You currently have no issues assigned to you. Enjoy your day!

Activity Streams

Your Company JIRA

No activity was found

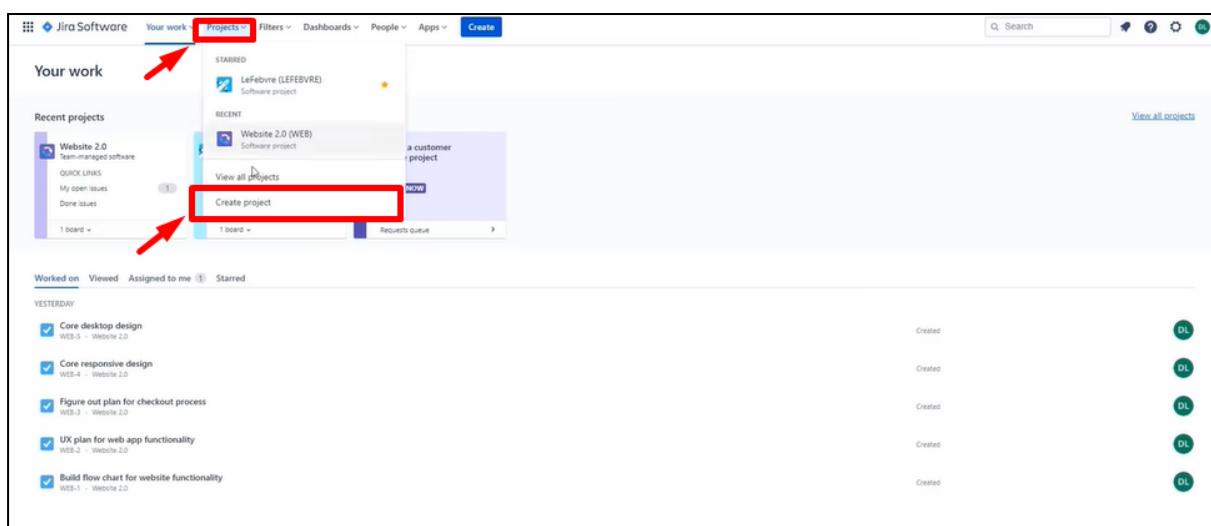
The main customization features of team management have been described.

# How to create a company-managed project

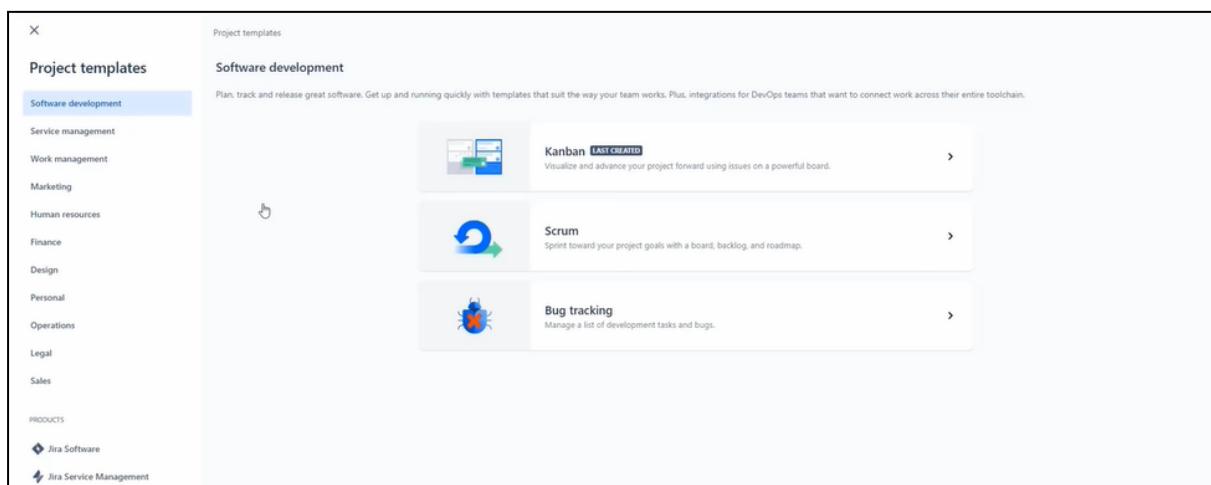
To create a company-managed project:

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

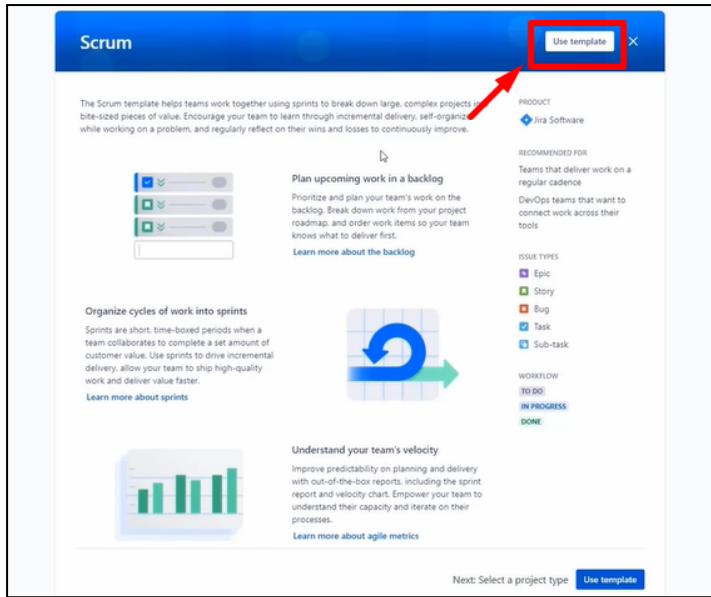
1. Click **Projects>Create project**.



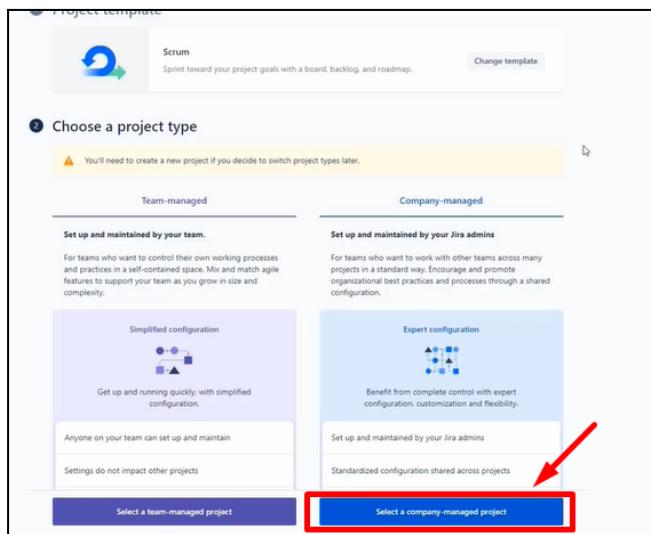
2. Choose a project template.



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**.

Add project details

You can change these details anytime in your project settings.

Name: Marketing Team

Key: MT

Type: Company-managed

Connect repositories, documents, and more

**Create project**

Marketing Team

MARKETING board

Active sprints

TO DO IN PROGRESS DONE

There are no active sprints  
Start sprints in the Backlog

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**.

Marketing Team

MARKETING board

+ Create board

TO DO IN PROGRESS DONE

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

The screenshot shows the Jira Software interface for the 'MARKETING board' under the 'Marketing Team' project. The left sidebar has a red box around the 'Roadmap' option. The main area is titled 'Roadmap' and shows a timeline from AUG to DEC. A single epic item, 'What needs to be done?', is listed for the month of August. The interface includes standard Jira navigation like 'Search', 'Share', and 'Export' at the top right.

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

The screenshot shows the Jira Software interface for the 'MARKETING board' under the 'Marketing Team' project. The left sidebar has a red box around the 'Backlog' option. The main area is titled 'Backlog' and shows a list of items. One item, 'What needs to be done?', is highlighted with a blue box and a yellow clipboard icon. A tooltip says: 'Plan your team's work. The backlog is your team's to-do list. Create 3 issues, and rank them in order of priority.' The interface includes filters for 'Only My Issues' and 'Recently Updated'.

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

The screenshot shows the Jira Software interface for the 'MARKETING board' under the 'Marketing Team' project. The left sidebar has a red box around the 'Active sprints' button. The main area is titled 'Backlog'. At the top right, there is a button labeled 'Complete sprint' with a red arrow pointing to it. The interface includes standard Jira navigation like 'Search', 'Share', and 'Export' at the top right.

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

Marketing Team Software project

MARKETING board

- Board
- Roadmap
- Backlog
- Active sprints**
- Reports**
- Issues
- Components
- Code
- Releases
- Project pages
- Add shortcut
- Project settings

Active sprints

TO DO IN PROGRESS DONE

There are no active sprints  
Start sprints in the Backlog

All reports

Agile

- Burndown Chart
- Burnup Chart
- Sprint Report
- Velocity Chart
- Cumulative Flow Diagram
- Version Report
- Epic Report
- Control Chart
- Epic Burndown
- Release Burndown
- Cycle time report NEW

Marketing Team Software project

Back to project

Reports

All reports

Agile

Burndown Chart

Track the total work remaining and project the likelihood of achieving the sprint goal. This helps your team manage its progress and respond accordingly.

Burnup Chart

Track the total scope independently from the total work done. This helps your team manage its progress and better understand the effect of scope change.

Sprint Report

Understand the work completed or pushed back to the backlog in each sprint. This helps you determine if your team is overcommitting or if there is excessive scope creep.

Velocity Chart

Track the amount of work completed from sprint to sprint. This helps you determine your team's velocity and estimate the work your team can realistically achieve in future sprints.

Cumulative Flow Diagram

Shows the statuses of issues over time. This helps you identify potential bottlenecks that need to be investigated.

Version Report

Track the projected release date for a version. This helps you monitor whether the version will release on time, so you can take action if work is falling behind.

Epic Report

Understand the progress towards completing an epic over time. This helps you manage your team's progress by tracking the remaining incomplete/unestimated work.

Control Chart

Shows the cycle time for your product, version or sprint. This helps you identify whether data from the current process can be used to determine future performance.

Epic Burndown

Track the projected number of sprints required to complete the epic (optimized for Scrum). This helps you monitor whether the epic will release on time, so you can take action if work is falling behind.

Release Burndown

Track the projected release date for a version (optimized for Scrum). This helps you monitor whether the version will release on time, so you can take action if work is falling behind.

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

All reports

Agile

- Burndown Chart
- Burnup Chart
- Sprint Report
- Velocity Chart
- Cumulative Flow Diagram
- Version Report
- Epic Report
- Control Chart
- Epic Burndown
- Release Burndown

Marketing Team Software project

Back to project

Reports

**Issues**

Components

Code

Releases

Project pages

Add shortcut

Project settings

Jira Software - Marketing Team - Issues

Search issues Project: Marketing Team Type Status Assignees More +

No issues were found matching your search

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

Jira Software - Marketing Team - Components

This project doesn't have any components, yet

Create component Learn more

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

Jira Software - Marketing Team - Code

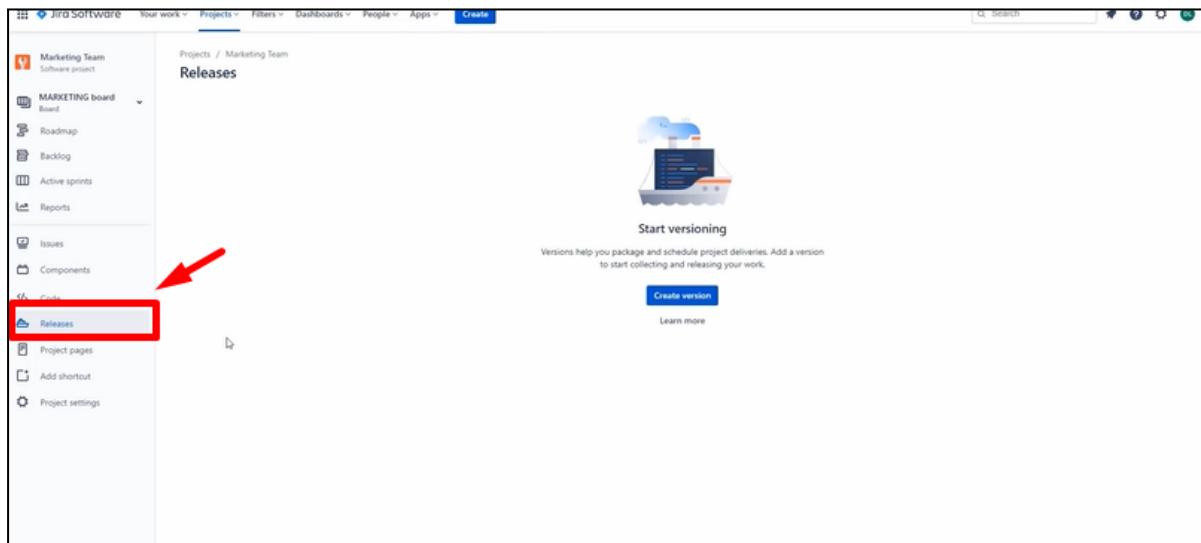
Give feedback ...

Select a source code management tool

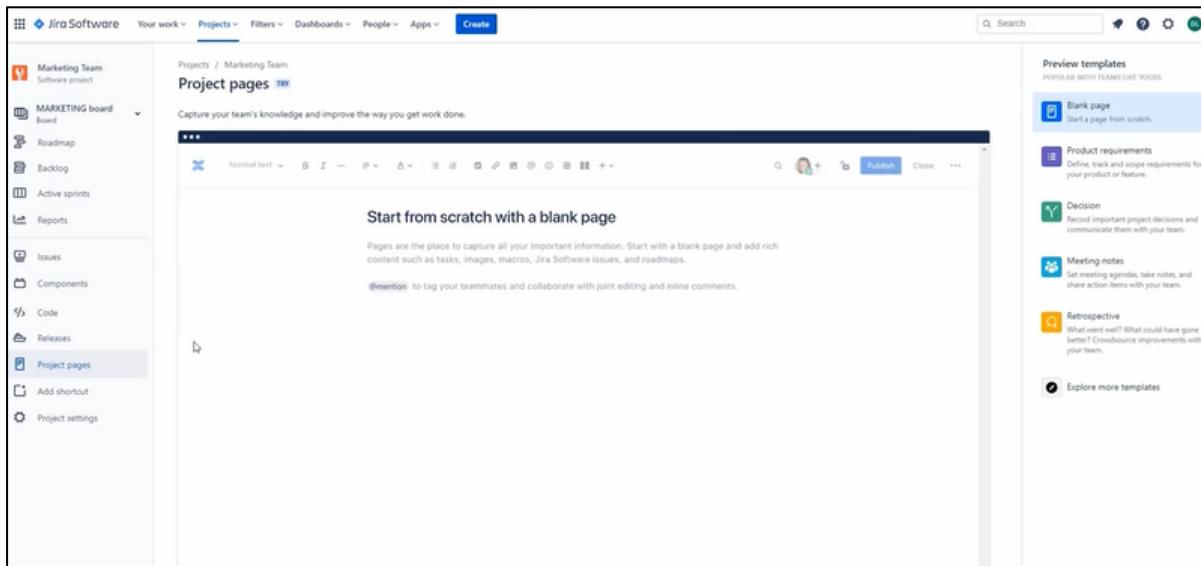
Bitbucket GET STARTED FREE Connect to Bitbucket Connect to other providers

Release 14% more often with Jira and Bitbucket

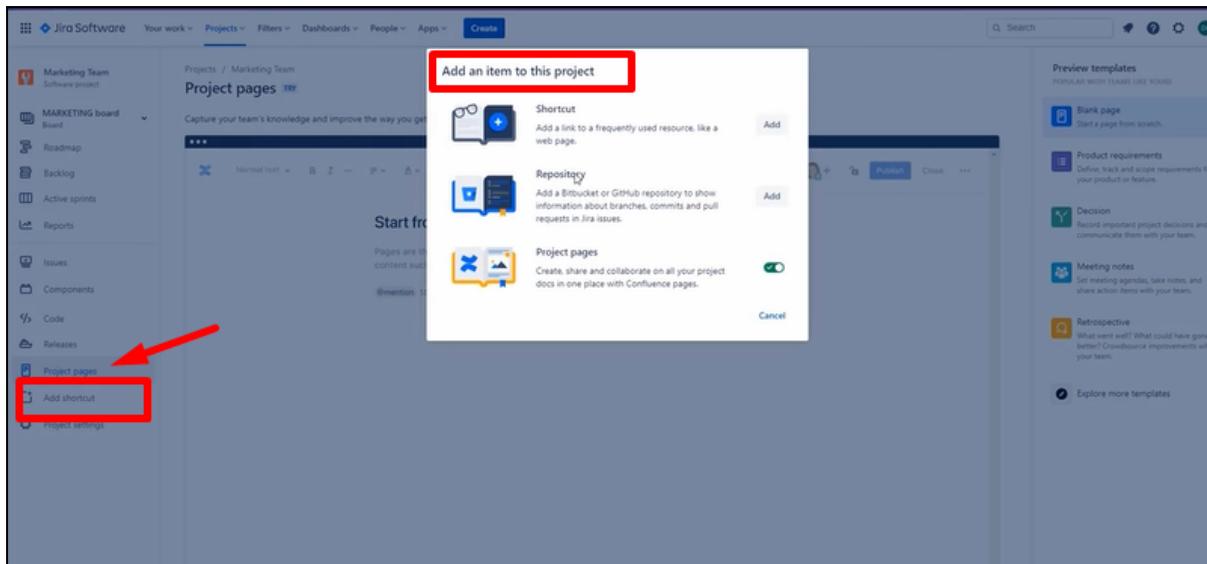
9. To see what issues, bugs, and stories were resolved in a release, click **Releases**.



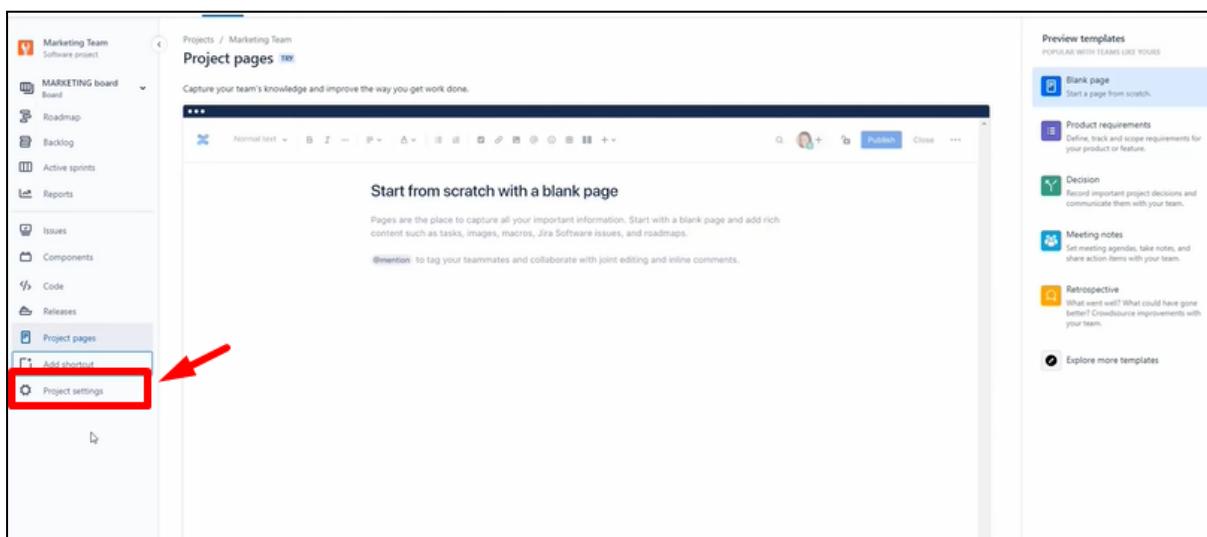
10. To have access to Confluence's project pages, click **Project pages**.



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.



Jira Software

Marketing Team Software project

Marketing board

Roadmap

Backlog

Active sprints

Reports

Issues

Components

Code

Releases

Project pages

Add shortcut

Project settings

Projects / Marketing Team / Project settings

**Details**

Name\* Marketing Team

Key\* MARKETING

URL

Project type

Project category

Avatar\* select image

Description

Style

Project lead\* Dan Lafebvre

Default Assignee Unassigned

You're in a company-managed project

Learn more

## Scrum Agile board overview

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

Projects / Sample Scrum Project / SSP board

Sample Sprint 2

To Do

IN PROGRESS

DONE

Update task status by dragging and dropping from column to column >> Try dragging this task to "Done"

When the last task is done, the story can be automatically closed >> Drag this task to "Done" too

As a developer, I can update details on an item using the Detail View >> Click the "SSP-13" link at the top of this card to open the detail view

As a user, I can find important items on the board by using the customisable "Quick Filters" above >> Try clicking the "Only My Issues" Quick Filter above

As a scrum master, I can see the progress of a sprint via the Burndown Chart >> Click "Reports" to view the Burndown Chart

As a team, we can finish the sprint by clicking the cog icon next to the sprint name above the "To Do" column then selecting "Complete Sprint" >> Try closing this sprint now

Instructions for deleting this sample board and project are in the description for this issue >> Click the "SSP-17" link and read the description tab of the detail view for more

SSP-10 [IN PROGRESS] 2 sub-tasks As a developer, I can update story and task status with drag and drop (click the triangle at far left of this story to show sub-tasks)

SSP-11 [IN PROGRESS]

SSP-12 [IN PROGRESS]

SSP-13 [IN PROGRESS]

SSP-14 [IN PROGRESS]

SSP-15 [IN PROGRESS]

SSP-16 [IN PROGRESS]

SSP-17 [IN PROGRESS]

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

The screenshot shows a Jira Scrum board titled "Sample Sprint 2". At the top, there is a navigation bar with a search field, a "DL" icon, and two buttons: "Only My Issues" and "Recently Updated". A red arrow points to the "Only My Issues" button. Below the navigation bar, there are three columns: "TO DO", "IN PROGRESS", and "DONE". The "IN PROGRESS" column contains several cards, one of which is highlighted with a red border. The card has a title and some descriptive text. The "DONE" column also contains cards with similar titles and descriptions. At the bottom of the board, there is a section for "Other Issues 5 issues" and some general instructions.

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

This screenshot is identical to the one above, showing the "Sample Sprint 2" board. However, the "Only My Issues" and "Recently Updated" buttons in the top navigation bar are now highlighted with a red box. A red arrow points to the "Only My Issues" button. The rest of the board structure and content are the same as in the first screenshot.

- Adding automation to the issues on the board.

The screenshot shows a Jira board titled "Sample Sprint 2". At the top right, there is a pinned board icon (a red star inside a square) which is highlighted with a red arrow. The board has three columns: "TO DO", "IN PROGRESS", and "DONE". A story card in the "IN PROGRESS" column has its status updated to "Done". The right sidebar contains automation rules and a burndown chart.

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

The screenshot shows a Jira board titled "Sample Sprint 2". At the top right, there is a pinned board icon (a red star inside a square) which is highlighted with a red arrow. The board has three columns: "TO DO", "IN PROGRESS", and "DONE". A story card in the "IN PROGRESS" column has its status updated to "Done". The right sidebar contains automation rules and a burndown chart.

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

The screenshot shows a Jira board titled "Sample Sprint 2". At the top right, there is a pinned board icon (a red star inside a square) which is highlighted with a red arrow. The board has three columns: "TO DO", "IN PROGRESS", and "DONE". A story card in the "IN PROGRESS" column has its status updated to "Done". The right sidebar contains automation rules and a burndown chart.

- Completing the sprint

This screenshot shows a Jira Sprint board for 'Sample Sprint 2'. At the top right, there is a 'Complete sprint' button with a red box and arrow pointing to it. The board has three columns: 'TO DO', 'IN PROGRESS', and 'DONE'. In the 'IN PROGRESS' column, there is a card for 'SSP-10' with sub-tasks 'SSP-11' and 'SSP-12'. In the 'DONE' column, there are cards for 'SSP-13', 'SSP-14', 'SSP-15', 'SSP-16', and 'SSP-17'. The 'TO DO' column contains a card for 'Other Issues 5 issues'.

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

This screenshot shows a Jira Sprint board for 'Sample Sprint 2'. At the top right, there is a 'Share' button with a red box and arrow pointing to it. The board structure is identical to the previous screenshot, with 'TO DO', 'IN PROGRESS', and 'DONE' columns and various cards and sub-tasks.

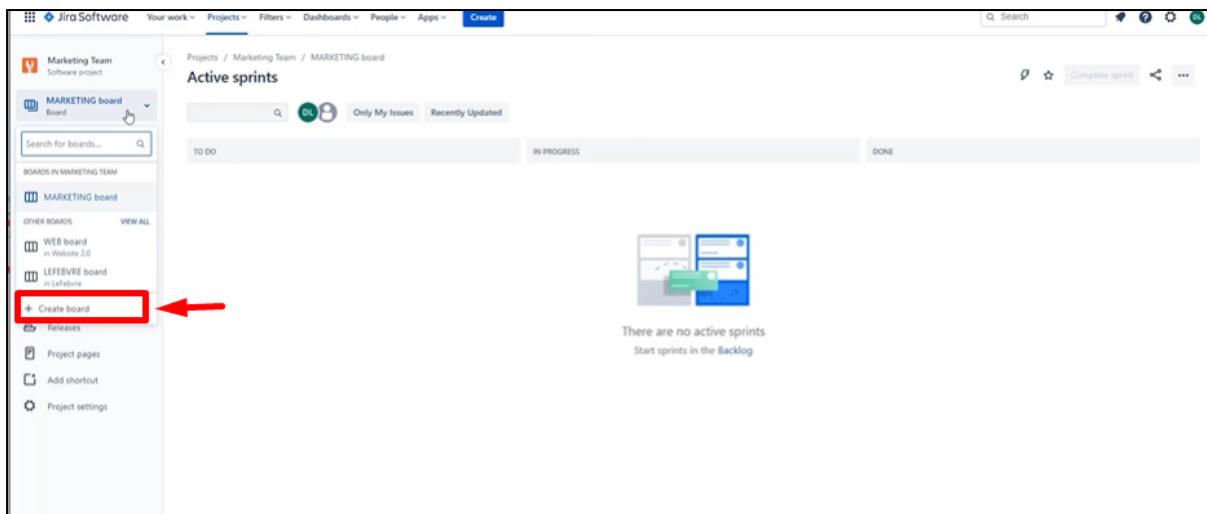
- Changing settings in a Sprint (board settings, etc.).

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

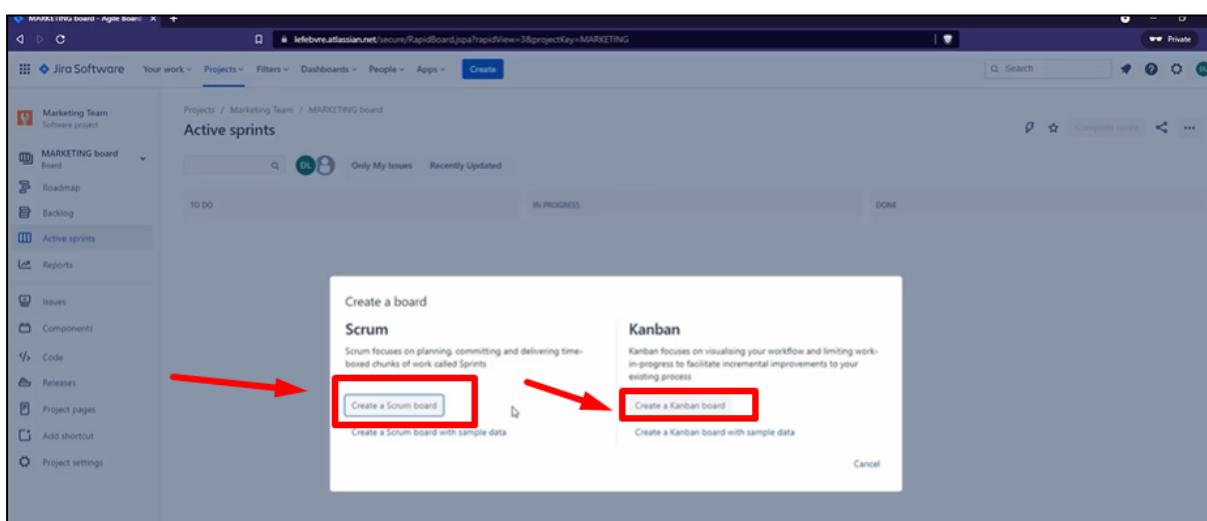
## How to create a new scrum board

To create a new scrum board:

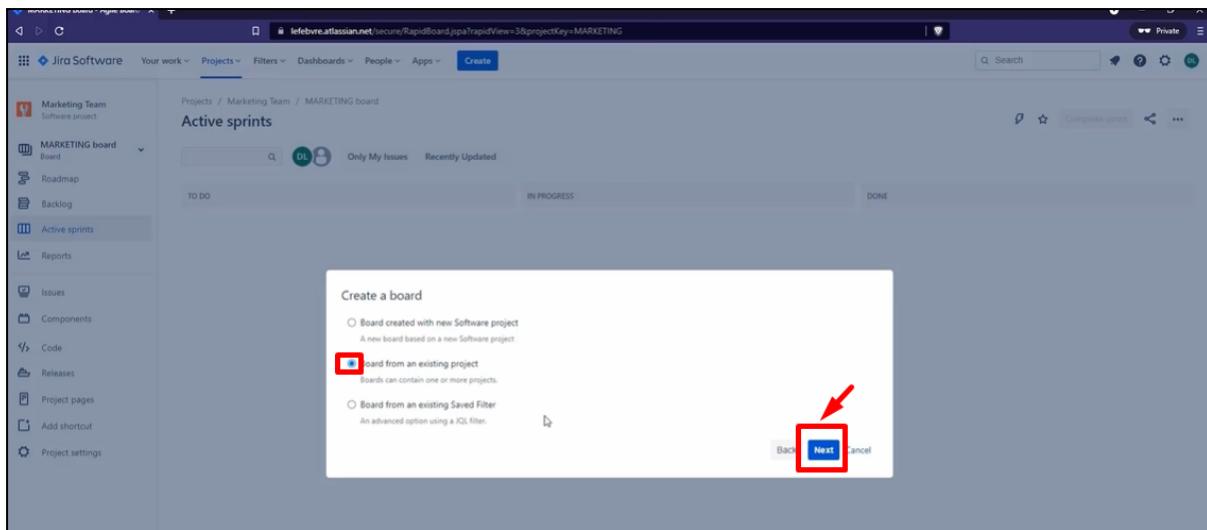
1. Click **MARKETING board** and select **Create board** from the dropdown list.



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**.

A screenshot of the 'Name this board' dialog box. It has fields for 'Board name\*' (containing 'Sample Scrum Board'), 'Project\*' (dropdown set to 'Marketing Team (MARKETING)'), and 'Location\*' (dropdown set to 'Marketing Team (MARKETING)'). Below these fields is a note: 'Select a Software project or your own profile as the place where this board will live'. At the bottom right, there are 'Back', 'Create board', and 'Cancel' buttons, with 'Create board' being highlighted with a red box and a red arrow pointing to it.

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.

The screenshot shows the Jira Software interface with the 'Marketing Team' project selected. In the top navigation bar, there's a dropdown menu with 'Sample Scrum Board' highlighted. Below the navigation bar, there's a search bar and some filters. On the left, there's a sidebar with a list of boards under 'BOARDS IN MARKETING TEAM' and 'OTHER BOARDS'. At the bottom of this sidebar, there's a button labeled '+ Create board...'. A red arrow points from the text '2. Click Create a Scrum board with sample data.' to this button.

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

This screenshot shows the 'Create a board' dialog box. It has two main sections: 'Scrum' on the left and 'Kanban' on the right. The 'Scrum' section includes a 'Create a Scrum board' button and a 'Create a Scrum board with sample data' button, both of which are highlighted with a red box and have a red arrow pointing to them. The 'Kanban' section includes a 'Create a Kanban board' button and a 'Create a Kanban board with sample data' button. There is also a 'Cancel' button at the bottom right.

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

This screenshot shows the 'New project with board' dialog box. It has several input fields: 'Project name' (filled with 'Sample Scrum Project'), 'Project key' (filled with 'SSP'), and 'Project lead' (set to 'Dan LeFebvre'). To the right, there's a 'Creating a project' section with a brief description and a 'Create board' button, which is highlighted with a red box and has a red arrow pointing to it. There are also 'Back' and 'Cancel' buttons at the bottom.

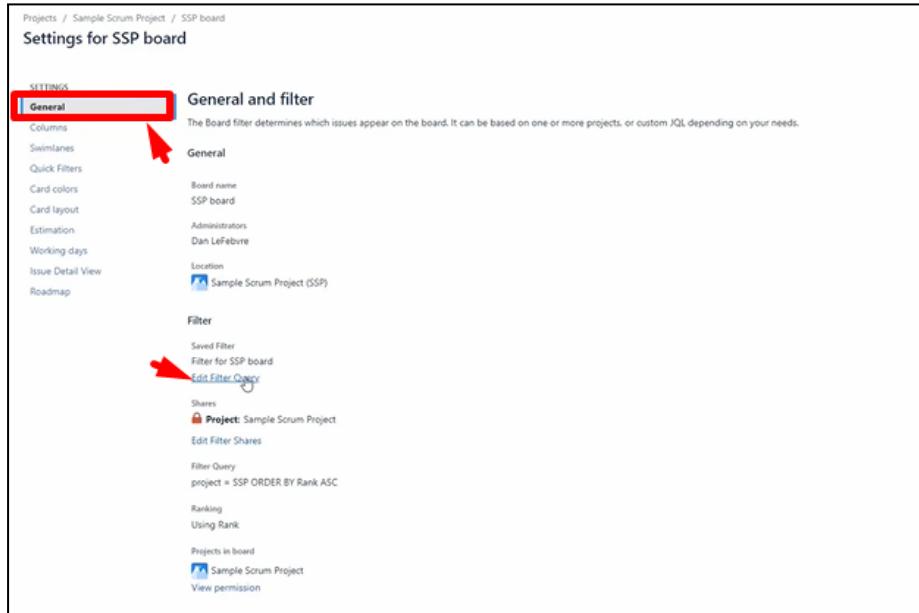
The Scrum board with sample data has been created.

## 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**.



Projects / Sample Scrum Project / SSP board  
Settings for SSP board

**SETTINGS**  
**General**  General and filter

The Board filter determines which issues appear on the board. It can be based on one or more projects, or custom JQL depending on your needs.

**General**

Board name: SSP board  
Administrators: Dan LeFebvre  
Location: Sample Scrum Project (SSP)

**Filter**

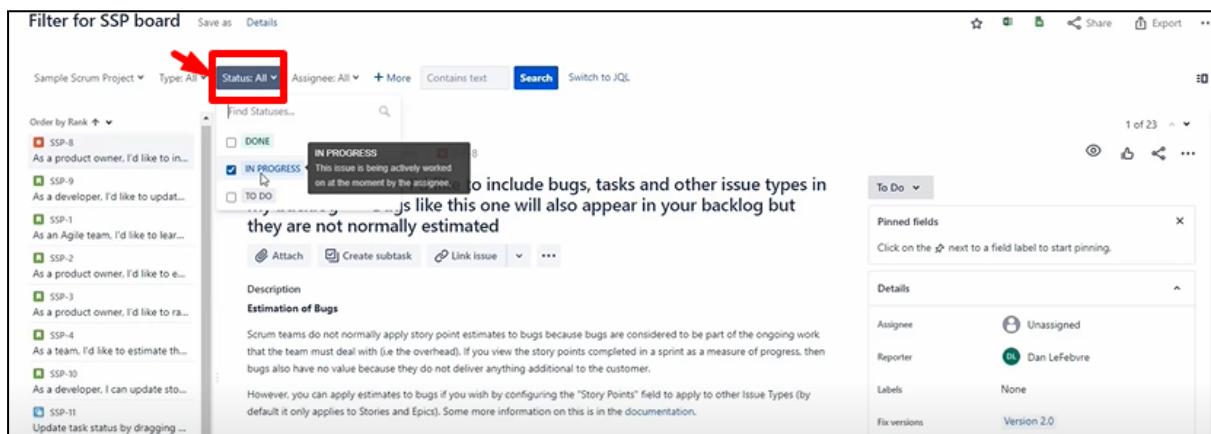
Saved Filter: Filter for SSP board 

Shares:  Project: Sample Scrum Project  
Edit Filter Shares

Filter Query:  
project = SSP ORDER BY Rank ASC

Ranking: Using Rank  
Projects in board: Sample Scrum Project  
View permission

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



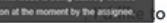
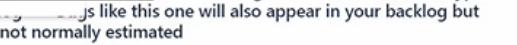
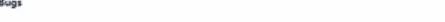
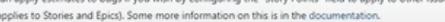
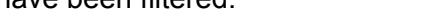
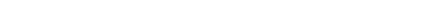
Filter for SSP board 

Sample Scrum Project  Type: All  Save as Details Share Export ...

Status: All  Assignee: All  + More Contains text Search Switch to JQL

Order by Rank   SSP-8 As a product owner, I'd like to in...   SSP-9 As a developer, I'd like to updat...   SSP-1 As an Agile team, I'd like to lea...   SSP-2 As a product owner, I'd like to e...   SSP-3 As a product owner, I'd like to ra...   SSP-4 As a team, I'd like to estimate th...   SSP-10 As a developer, I can update sto...   SSP-11 Update task status by dragging --

**Status All**  Assignee: All  + More Contains text Search Switch to JQL

**DONE**                                              <img alt