

JIRA

A Powerful Tool for Project & Agile Management

Presented by - Yash Sharma

What is JIRA?

- Developed by **Atlassian**
- JIRA is a **project management and issue tracking tool**
- Commonly used for **Agile** and **Scrum** project methodologies
- Enables teams to **plan, track, and release software or projects**

Originally designed for bug tracking but now widely used across industries

Features That Make JIRA Powerful

- Agile Boards (Scrum & Kanban)
- Backlog Management
- Sprint Planning & Tracking
- Custom Workflows
- Issue Types (Bug, Story, Task, Epic)
- Dashboards & Reports
- Integration with tools like Confluence, Bitbucket, Trello, etc.

Why Use Jira?

- Clear visibility of tasks and responsibilities
- Better collaboration across departments
- Helps manage Agile/Scrum processes
- Keeps stakeholders informed through dashboards and timelines
- Customizable to fit different industries and teams

How JIRA is Used Day-to-Day

- Creating Epics, Stories, Tasks
- Assigning issues to team members
- Tracking project progress on a visual board
- Creating documentation and linking Confluence
- Reporting: Burndown charts, velocity reports

Business Analysts use it to define and track requirements

Fun & Interesting Facts

- The name "JIRA" comes from "Gojira" (Japanese for **Godzilla**)
- Jira supports **over 25 languages**
- Over **65% of Fortune 500** companies use JIRA
- JIRA integrates with **over 3,000 apps and tools**
- Used by big brands like **NASA, eBay, Cisco, and Airbnb**
- Atlassian doesn't have a sales team—relies on product-led growth

How Analysts Use JIRA

- Creating and tracking user stories and tasks
- Writing acceptance criteria and definitions of done
- Collaborating with developers/testers via Jira comments and attachments
- Monitoring project timelines and statuses
- Generating Jira reports for insights

What is Agile?

- ❑ Agile is a flexible, iterative approach to software and project development that focuses on **collaboration, customer feedback, and delivering small, usable features quickly.**

Agile breaks work into **small, manageable parts** called iterations or sprints.

Encourages **continuous feedback** and **adaptability to change.**

Promotes **cross-functional team collaboration.**

Delivers **working solutions frequently** rather than all at once.

“Individuals and interactions over processes and tools.

Working software over comprehensive documentation.

Customer collaboration over contract negotiation.

Responding to change over following a plan.”

Agile

Basic Task Hierarchy in Jira

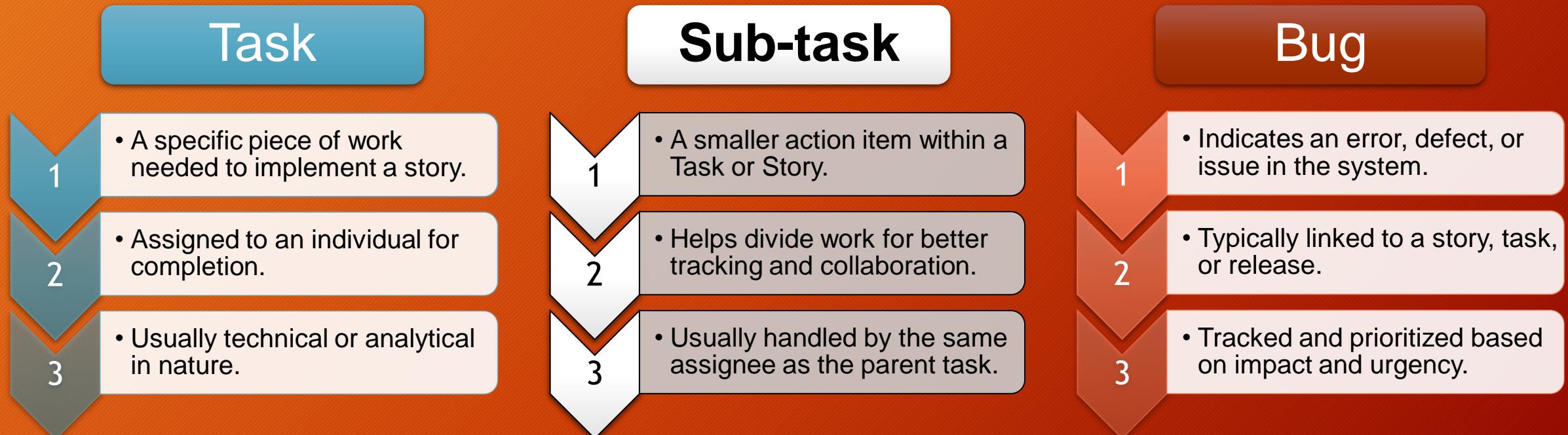
Epic

- 1 • Represents a large body of work or business goal.
- 2 • Typically spans multiple sprints and user stories or Tasks.
- 3 • Used to group related features or high-level initiatives

User Story

- 1 • Describes a requirement from the user's perspective.
- 2 • format: *As a [user], I want [feature], so that [benefit].*
- 3 • Helps the team understand what the user needs and why.

Basic Task Hierarchy in Jira



- Task and User story have the same Rank.
- Epics, User Stories, and Bugs can be created as standalone items.
- Sub-tasks can only be created under a parent issue, such as a Story, Task, Bug, or Epic.

Overview of Jira Project Navigation Panels

- This section of the presentation introduces the key views available in a Jira software project, especially within Scrum or Kanban boards.
- Each slide explains one Jira view- such as Summary, Backlog, Board, Reports, and more - to help you understand how teams manage and track their work efficiently in an Agile environment.

1. Summary

- Provides a high-level overview of project activity and health.
- Shows issue statistics, status breakdowns, and updates.
- Highlights recent work by team members.
- Good for stakeholders to quickly assess progress.

Jira

Search + Create Premium trial

For you Recent Starred Apps Plans Projects + ...

Recent My Scrum Project View all projects Teams More

Give feedback on the n...

Projects My Scrum Project ...

Summary Backlog Board Code Timeline Pages Forms +

Filter

2 completed in the last 7 days 20 updated in the last 7 days 20 created in the last 7 days 0 due soon in the next 7 days

Status overview Get a snapshot of the status of your work items. [View all work items](#)

30% To Do

Status	Count
To Do	6
In Progress	5
In Review	7
Done	2

Recent activity Stay up to date with what's happening across the project.

Yesterday

Yash Sharma updated field "Sprint" on SCRUM-4: (Sample) Remember Me Option TO DO about 18 hours ago

Yash Sharma updated field "Sprint" on SCRUM-15: (Sample) Add Login Rate Limiting TO DO about 18 hours ago

Yash Sharma updated field "Sprint" on SCRUM-9: (Sample) Add Temporary Admin Login IN PROGRESS

Priority breakdown Get a holistic view of how work is being prioritized. [See what your team's been focusing on](#)

Types of work Get a breakdown of work items by their types. [View all items](#)

Type	Distribution
Task	28%
Story	28%
Epic	...
Request	...
Bug	...

Quickstart

2. Backlog

- Lists all unscheduled stories, tasks, and bugs.
- Allows prioritizing and grooming work before starting a sprint.
- Supports drag-and-drop of issues into sprints.
- Crucial for sprint planning and product refinement.

The screenshot shows the Jira interface for a project named "My Scrum Project". The left sidebar includes links for "For you", "Recent", "Starred", "Apps", "Plans", "Projects" (with "My Scrum Project" selected), "View all projects", "Teams", and "More". The main area displays the "Backlog" tab for "My Scrum Project". It shows two sprints: "SCRUM Sprint 0" (8 Jul – 22 Jul) and "SCRUM Sprint 1". "SCRUM Sprint 0" contains 14 work items, including tasks like "Remember Me Option", "Payment Confirmation", and "Multi-Factor Authentication". "SCRUM Sprint 1" currently has 0 work items. A "Quickstart" button is visible at the bottom right.

Issue Key	Description	Type	Status	Assignee
SCRAM-4	(Sample) Remember Me Option	(SAMPLE) USER AUTH...	TO DO	
SCRAM-7	(Sample) Payment Confirmation	(SAMPLE) PAYMENT P...	IN REVIEW	
SCRAM-5	(Sample) Integrate OAuth2 Authentication	(SAMPLE) USER AUTH...	IN REVIEW	
SCRAM-8	(Sample) Integrate Payment Gateway API	(SAMPLE) PAYMENT P...	DONE	
SCRAM-6	(Sample) Login Session Expiring Too Soon	(SAMPLE) USER AUTH...	IN REVIEW	
SCRAM-9	(Sample) Add Temporary Admin Login	(SAMPLE) USER AUTH...	IN PROGRESS	
SCRAM-13	(Sample) User Login	(SAMPLE) USER AUTH...	IN REVIEW	
SCRAM-14	(Sample) Duplicate Charges on Rapid Clicks	(SAMPLE) PAYMENT P...	IN REVIEW	
SCRAM-15	(Sample) Add Login Rate Limiting	(SAMPLE) USER AUTH...	TO DO	
SCRAM-16	(Sample) Implement Session Timeout Logic	(SAMPLE) USER AUTH...	IN PROGRESS	
SCRAM-17	(Sample) Multi-Factor Authentication	(SAMPLE) USER AUTH...	IN REVIEW	
SCRAM-18	(Sample) Credit Card Payment	(SAMPLE) PAYMENT P...	DONE	
SCRAM-19	(Sample) Password Recovery	(SAMPLE) USER AUTH...	IN PROGRESS	
SCRAM-20	(Sample) Set Up Payment Logging	(SAMPLE) PAYMENT P...	IN REVIEW	

3. Board

- Visualizes tasks in columns like To Do, In Progress, Done.
- Enables real-time tracking of sprint progress.
- Supports drag-and-drop issue management.
- Ideal for daily standups and sprint execution.

The screenshot shows the Jira Board interface for the project "My Scrum Project". The board is divided into four main columns: TO DO, IN PROGRESS, IN REVIEW, and DONE. Each column contains several items, each represented by a card with a title, a sub-type indicator in a purple box, and a unique ID (e.g., SCRUM-4, SCRUM-9, SCRUM-16, SCRUM-5, SCRUM-19, SCRUM-6, SCRUM-13, SCRUM-14, SCRUM-18). The "IN PROGRESS" column has three items, while the others have two. A "Create" button is located at the bottom of the TO DO column. The top navigation bar includes links for Summary, Backlog, Board, Code, Timeline, Pages, Forms, and a Create button. The right side of the screen features various filter and sorting options, along with a "Complete sprint" button.

Column	Item 1	Item 2	Item 3
TO DO	(Sample) Remember Me Option (SAMPLE) USER AUTHENTICATION SCRUM-4	(Sample) Add Login Rate Limiting (SAMPLE) USER AUTHENTICATION SCRUM-15	
IN PROGRESS	(Sample) Add Temporary Admin Login (SAMPLE) USER AUTHENTICATION SCRUM-9	(Sample) Implement Session Timeout Logic (SAMPLE) USER AUTHENTICATION SCRUM-16	
IN REVIEW	(Sample) Payment Confirmation (SAMPLE) PAYMENT PROCESSING SCRUM-7	(Sample) Password Recovery (SAMPLE) USER AUTHENTICATION SCRUM-19	
DONE	(Sample) Integrate OAuth2 Authentication (SAMPLE) USER AUTHENTICATION SCRUM-5	(Sample) Login Session Expiring Too Soon (SAMPLE) USER AUTHENTICATION SCRUM-6	
		(Sample) User Login (SAMPLE) USER AUTHENTICATION SCRUM-13	
		(Sample) Duplicate Charges on Rapid Clicks (SAMPLE) PAYMENT PROCESSING SCRUM-14	
		(Sample) Multi-Factor Authentication (SAMPLE) USER AUTHENTICATION	

4. Code

- Connects Jira with tools where developers write and store code (like GitHub or Bitbucket).
- Lets the team see which code changes are linked to specific tasks or bugs.
- Helps track who is working on what in the code.
- Useful for BAs to understand if a feature is being built or fixed.

The screenshot shows the Jira interface with the 'Code' tab selected. On the left, there's a sidebar with links like 'For you', 'Recent', 'Starred', 'Apps', 'Plans', 'Projects', 'Recent', 'View all projects', 'Teams', and 'More'. The main area displays a 'My Scrum Project' card with sections for 'Summary', 'Backlog', 'Board', 'Timeline', 'Pages', 'Forms', and '+'. Below this, there's a callout box with a purple border containing a screenshot of a GitHub commit history showing a pull request for 'Kan-251'. Another callout box shows a terminal window with the command '\$ git commit -m "Kan-1 Update"'. A section titled 'Connect your code to Jira' explains how it minimizes context switching and improves visibility of development workflow. It includes buttons to 'Connect GitHub', 'Connect GitLab', and 'Connect Bitbucket', along with a link to 'Explore other integrations'. At the bottom right, there's a 'Quickstart' button.

Jira

Search

+ Create

Premium trial

For you

Recent

Starred

Apps

Plans

Projects

Recent

View all projects

Teams

More

My Scrum Project

Summary Backlog Board Timeline Pages Forms +

kan-251

\$ git commit -m "Kan-1 Update"

Connect your code to Jira

Minimize context switching and gain visibility of your team's pull requests and development workflow.

Connect GitHub

Connect GitLab

Connect Bitbucket

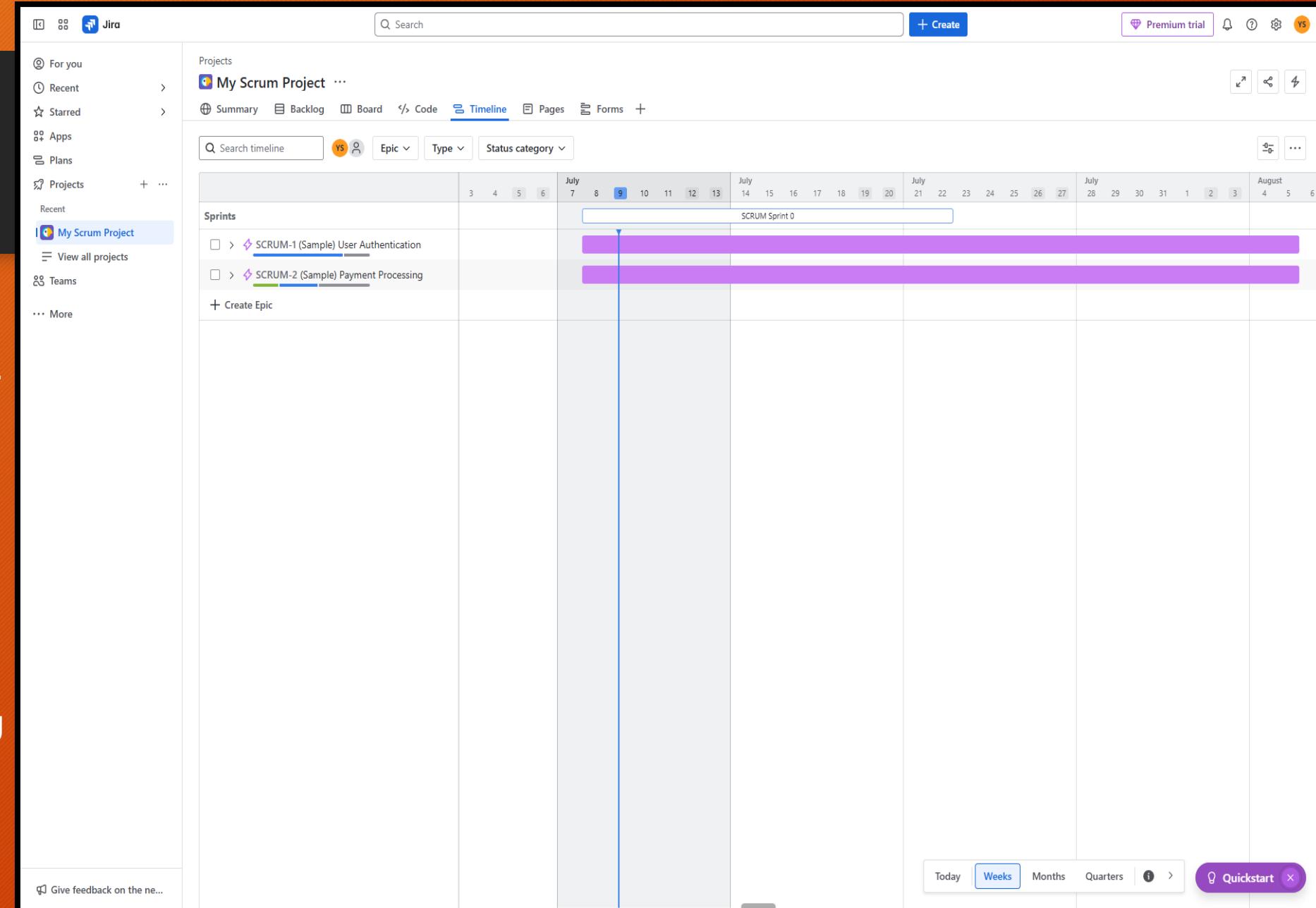
Explore other integrations

Give feedback on the ne...

Quickstart

5. Timeline

- Offers a roadmap-style view of issues across time.
- Helps visualize project plans, dependencies, and milestones.
- Drag to reschedule issues or adjust durations.
- Useful for release planning and delivery forecasting.



6. Pages

(Confluence Integration)

- Links to **Confluence pages** for documentation and notes.
- Provides **centralized access** to meeting notes, BRDs, FRDs, etc.
- Useful for **knowledge sharing and team onboarding**.
- Keeps documents **linked and version-controlled**.

The screenshot shows the Jira software interface with the Confluence integration. The left sidebar shows navigation options like 'For you', 'Recent', 'Starred', 'Apps', 'Plans', 'Projects', 'Recent', 'Teams', and 'More'. The main area is titled 'My Scrum Project' and includes tabs for 'Summary', 'Backlog', 'Board', 'Code', 'Timeline', 'Pages' (which is selected), 'Forms', and '+'. A sub-section titled 'Start from scratch with a blank page' is displayed, along with a rich text editor toolbar. On the right side, there's a 'Preview templates' section with links to 'Blank page', 'Product requirements', 'Decision', 'Meeting notes', and 'Retrospective', each with a brief description. At the bottom, there's a 'Try it now' button and a 'Quickstart' link.

7. Forms

- Allows creation of **custom forms** for structured data collection.
- Non-technical users can **submit requests or feedback** easily.
- Responses create **Jira issues automatically**.
- Ideal for **intake forms, approvals, and change requests**.

The screenshot shows the Jira interface with the 'Forms' tab selected. On the left, a sidebar lists 'For you', 'Recent', 'Starred', 'Apps', 'Plans', 'Projects', 'View all projects', 'Teams', and 'More'. The main area displays a form titled 'Project My Scrum Project - Epic Form' with three fields: 'Summary*', 'Description', and 'Attachment'. A sidebar on the right titled 'Fields' lists various Jira fields like 'Assignee', 'Due date', 'Labels', etc., with a 'Create new field' button at the bottom.

Projects
My Scrum Project ...
Summary Backlog Board Code Timeline Pages Forms +

← Back

Epic ✓ All changes saved

Project My Scrum Project - Epic Form

Add help text and instructions to fill in this form

Summary*
Add a description
Answer will be written here

Description
Add a description
Answer will be written here

Attachment
Add a description
Attachments will be uploaded here

Drag another field here

Give feedback on the ne...

Premium trial

Fields

Drag fields to build your custom form.
Manage your form fields

- Assignee
- Due date
- Labels
- Parent
- Sprint
- Start date
- Story point estimate
- Team

+ Create new field

8. Reports

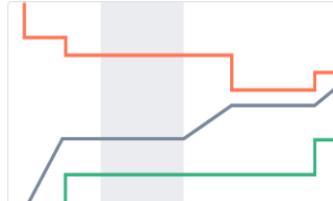
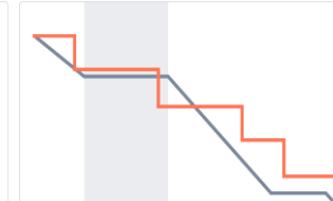
- Offers Agile metrics like **Burndown, Velocity, Sprint Reports.**
- Tracks **progress, performance, and trends** over time.
- Supports **team retrospectives** and planning.
- Customizable for different **users, teams, and sprints.**

Jira

Search + Create Premium trial

For you Recent Starred Apps Plans Projects Recent My Scrum Project View all projects Teams More

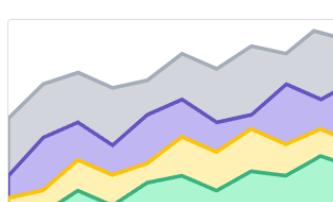
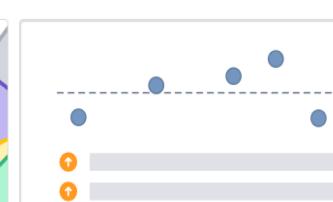
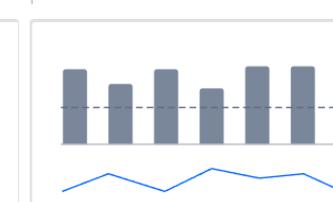
Projects My Scrum Project Summary Backlog Board Code Timeline Pages Forms Reports Goals Releases +

Burnup report
Visualise a sprint's completed work and compare it with its total scope. Use these insights to track progress toward sprint completion.

Sprint burndown chart
Track and manage the total work remaining within a sprint. After the sprint, summarise both team and individual performance.

AWAITING A COMPLETED SPRINT
Velocity report
Predict the amount of work your team can commit to in future sprints by seeing and reviewing the amount of value delivered in previous ones.

Cumulative flow diagram
Shows the statuses of your project's work items over time. See which columns accumulate more work items, and identify bottlenecks in your workflow.

Cycle Time Report
Understand how much time it takes to ship work items through the deployment pipeline and how to deal with outliers.

Deployment Frequency Report
Understand your deployment frequency to understand risk and how often you are shipping value to your customers.

Give feedback on the ne...

9. Goals

- Defines **high-level objectives** for a team or project.
- Links Jira issues and epics to specific **strategic goals**.
- Tracks progress towards **business outcomes**.
- Keeps the team **focused and aligned** on priorities.

Screenshot of the Jira Goals app interface:

The top navigation bar shows "Jira" and a search bar. The right side includes a "Premium trial" badge, notification bell, help icon, and settings gear. The left sidebar lists "For you", "Recent", "Starred", "Apps", "Plans", and "Projects" (with "My Scrum Project" selected). Below the sidebar are sections for "Recent", "View all projects", "Teams", and "More".

The main content area displays the "Goals" tab for "My Scrum Project". A central message asks, "Are your teams aligned on the 'why' of their work?". It explains that Goals give teams a single place to track objectives and connect the dots between their work and what it contributes to. It encourages users to try the app by clicking "Go to Atlassian Home".

On the right, there's a visual representation of goal progress with four columns of horizontal bars. Each column contains several bars, some with green segments indicating progress and others with red segments indicating blockers. To the left of these columns, there are three smaller boxes with icons: a lightning bolt, a target, and a checkmark.

At the bottom, there are three call-to-action cards:

- Create a goal once and use it everywhere**: Linking goals to Jira epics automatically syncs them. No more duplication or inconsistencies.
- Share progress and blockers with status updates**: Goal owners share monthly updates, so everyone has the latest context.
- Use the goal framework that suits your company**: From OKRs, to KPIs, and smart goals - goals are flexible to support any framework that you love.

10. Releases

- Manages versions and **tracks work done for each release.**
- Shows which issues are **included in upcoming or past versions.**
- Helps **plan release dates** and coordinate deployments.
- Useful for **product managers and QA** during rollout.

Screenshot of the Jira interface showing the 'Releases' section for the project 'My Scrum Project'. The 'Releases' tab is selected in the navigation bar. A search bar and a dropdown menu for 'Unreleased' are visible. Below, a table titled 'Release versions' shows columns for Version, Status, Progress, Start date, Release date, Description, and More actions. An illustration of a ship on waves is displayed, and the message 'No matching versions' is shown, along with a note: 'There aren't any versions in this project with that status. Check your filters and try again.'

11. On-call (Opsgenie Integration)

- Connects Jira with **on-call alerting systems** like Opsgenie.
- Manages **incident responses and escalations**.
- Displays **on-call schedules and duties** for team members.
- Ensures **24/7 support and incident readiness**.

The screenshot shows the Jira application interface. In the top left, there's a sidebar with links for 'For you', 'Recent', 'Starred', 'Apps', 'Plans', 'Projects' (which is currently selected), 'Recent', 'My Scrum Project' (highlighted in blue), 'View all projects', 'Teams', and 'More'. The main content area is titled 'My Scrum Project' and includes tabs for 'Summary', 'Backlog', 'Board', 'Code', 'Timeline', 'Pages', 'Forms', 'Reports', 'Goals', 'Releases', and 'On-call' (which is underlined). A prominent message box states: 'Opsgenie is moving to Jira Service Management. You'll get a better alerting and on-call experience in Jira Service Management — with advanced incident response capabilities, including AI-powered and automated workflows to fully support your team's operations.' It includes a link to 'Sign up for Jira Service Management · Read the announcement'. Below this is a section titled 'Your example schedule' showing a 14-day calendar from Monday, 7/07 to Sunday, 20/07. The schedule shows 'On Call' shifts for 'Emma' (Mon 7/07 to Fri 11/07) and 'José' (Sat 12/07 to Sun 20/07). A callout box says 'Create on-call schedules for your Jira project' with the text: 'Help your team stay in control when something goes wrong. Opsgenie gives your team the power to create on-call schedules and seamlessly link them with your projects in Jira.' It has 'Learn more' and 'Try Opsgenie' buttons. At the bottom left of the main area, it says 'Give feedback on the n...'. The top right of the screen shows a 'Premium trial' badge, user profile icons, and a 'Y5' badge.

Similarities (Scrum vs Kanban)

Both **Scrum** and **Kanban** projects in Jira can include:

- **Summary**
- **Board**
- **Backlog** (*optional in Kanban*)
- **Code**
- **Timeline**
- **Pages (Confluence)**
- **Forms**
- **Reports**
- **Goals**
- **Releases**
- **On-call**

Key Differences Between Scrum and Kanban in Jira:

Feature/View	Scrum	Kanban
▪ Sprints	▪ Yes (time-boxed work cycles)	▪ No (continuous flow)
▪ Backlog View	▪ Always present	▪ Optional (can be enabled)
▪ Active Sprint	▪ Used to show current sprint	▪ Not available
▪ Board	▪ Shows sprint-based progress	▪ Shows continuous workflow
▪ Reports	▪ Focused on sprint metrics (e.g., Burndown)	▪ Focused on flow metrics (e.g., Control chart, Cumulative flow)
▪ Velocity Tracking	▪ Built-in via sprints	▪ Not used
▪ Planning Style	▪ Sprint Planning, Reviews, Retros	▪ Continuous Planning
▪ Best For	▪ Teams working in fixed-length sprints	▪ Teams with continuous delivery or service requests

Scrum vs Kanban : Conclusion

- ❑ Scrum is for structured teams working in 2-week sprints with sprint reviews, retrospectives, and planned goals.
- ❑ Kanban is for ongoing work (e.g., support teams, design tasks) where tasks just move continuously without a sprint deadline.
- ❑ In Scrum, you'll be actively involved in Backlog grooming, sprint planning, and writing stories.
- ❑ In Kanban, you'll focus more on continuous task creation, progress tracking, and flow monitoring.

Using Jira : Step-by-Step Guide

This section walks through how to set up and use a Jira project for **Agile workflows** — including **project creation, team setup, backlog management, and sprint execution**.

1. Creating a New Jira Project

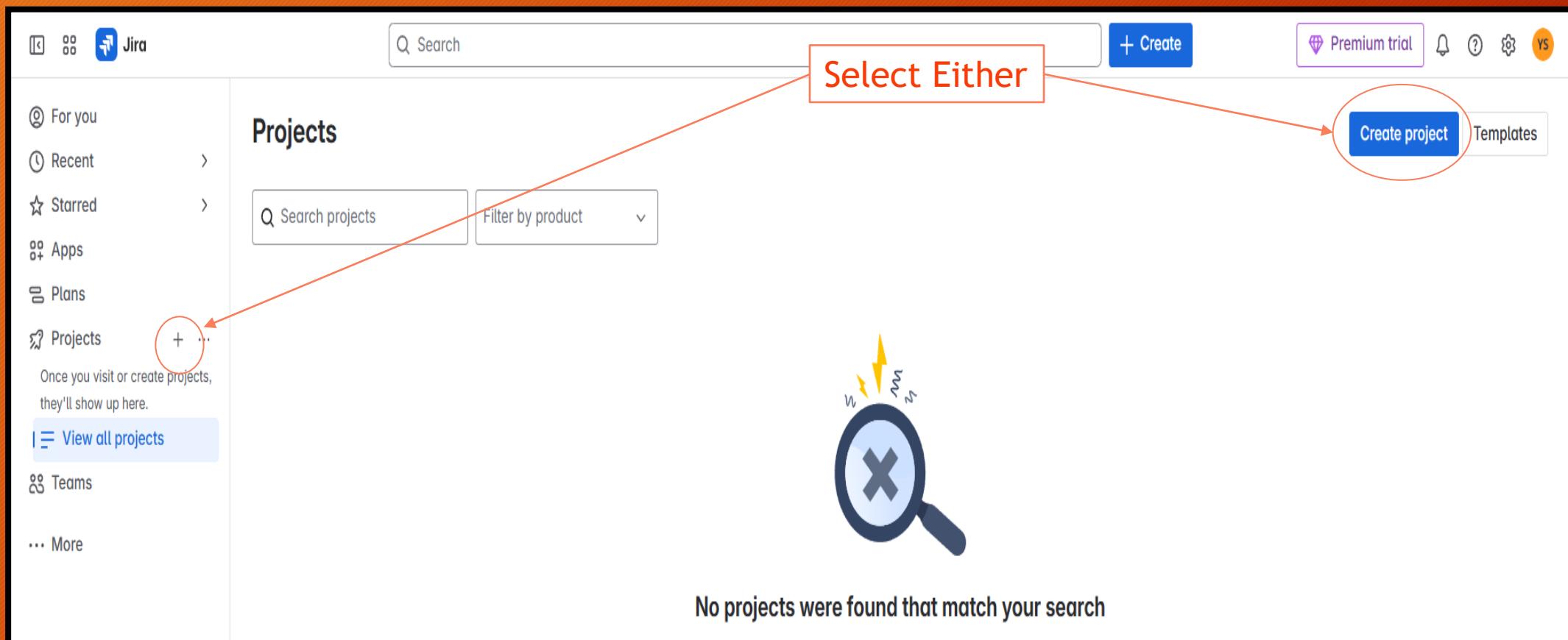
This section walks through the steps to create a new Jira project, from selecting the project template to naming and initializing the project.

Step 1 :

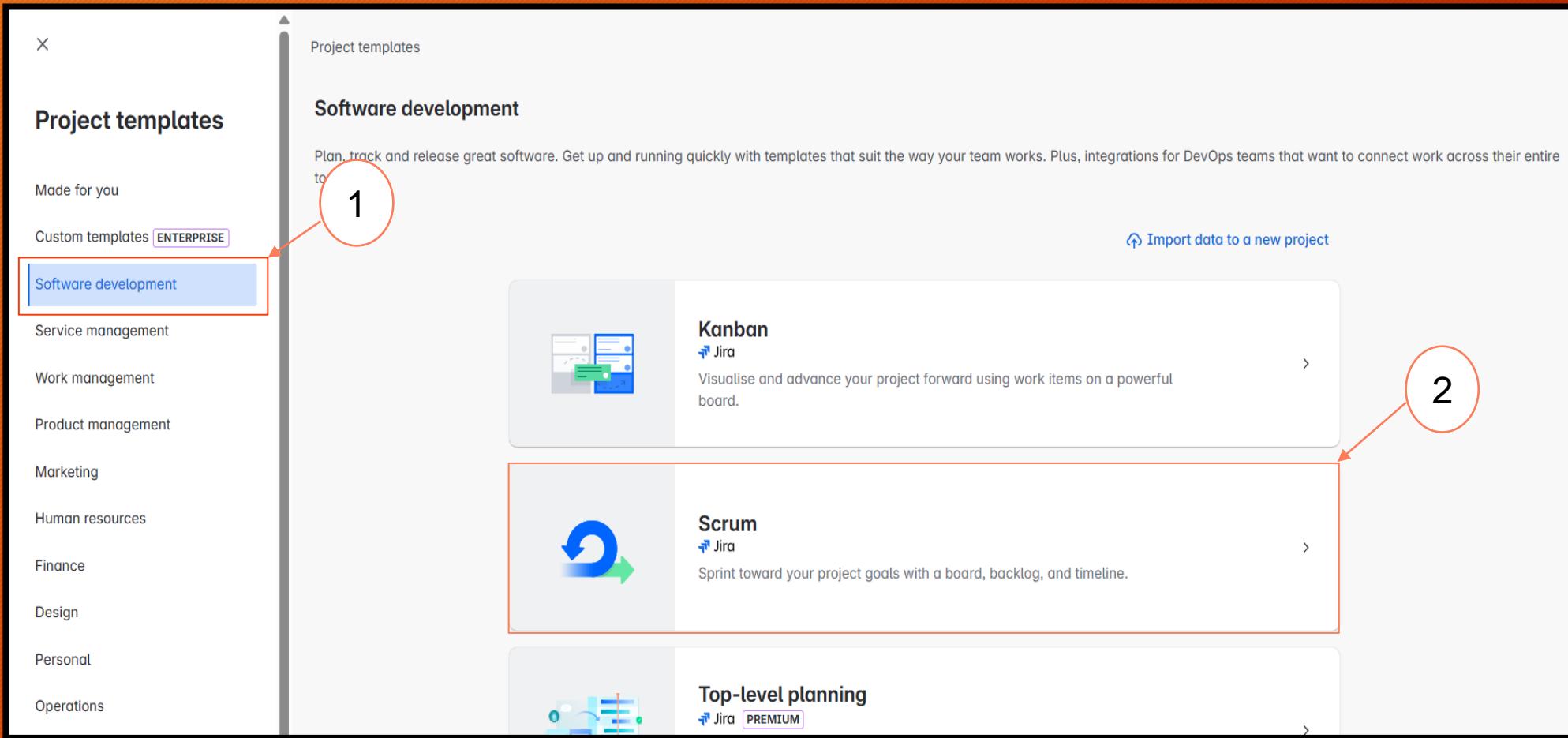
You can initiate the project creation process in **two ways**:

From the **left navigation panel**, click on the “**Projects**” button and then select the “**+**” icon next to it.

Or, go to the **top-right corner** of the screen and click on the “**Create project**” button.



Step 2 :



Step 3 :

1. Choose Project Type

- # The “Project Type” window appears.
- # Select “Team-managed project” to keep setup simple and self-contained.

2. Enter Project Details

- # The “Add project details” window will open.
- # Enter your **Project Name** the **Project Key** will auto-generate.
- # Choose the **Access Level** (select **Private** for a dummy/training project).

3. Create the Project :

- # Click the “Create project” button to proceed.

4. Skip Team Invitation

- # The “Bring the Team with You” page appears.
- # Click “Skip” at the bottom to continue without inviting.

The Project is Successfully Created

● Project template



Scrum
Jira
Sprint toward your project goals with a board, backlog, and timeline.

Change template

● 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.

Simplified configuration

Get up and running quickly, with simplified configuration.

Anyone on your team can set up and maintain
Settings do not impact other projects
Easy setup for work types and custom fields

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.

Expert configuration

Benefit from complete control with expert configuration, customization and flexibility.

Set up and maintained by your Jira admins
Standardized configuration shared across projects
Complete control over work types and custom fields

Select a company-managed project

Add project details

Explore what's possible when you collaborate with your team. Edit project details anytime in project settings.

Required fields are marked with an asterisk *

Name *
Qeats

Key * ⓘ
QEAT

Access *
Choose an access level

Private
Only admins and people you add to the project can search for, view, create, or edit its issues.

Limited
Anyone with access to the "yashsharmaanalytics-1751994732868" Jira site can search for, view, and comment on this project's issues. Only people you add to the project can create and edit its issues.

Open
Anyone with access to the "yashsharmaanalytics-1751994732868" Jira site can search for, view, create and edit this project's issues.

Template



Scrum
Jira
Sprint toward your project goals with a board, backlog, and timeline.

Change template

Type



Team-managed
Control your own working processes and practices in a self-contained space.

Change type

Cancel Create project

2. Adding and Assigning People in Jira

This section explains how to add team members to your Jira project and assign tasks to ensure clear responsibility and smooth collaboration.

Step 1 :

1. Navigate to the Teams Section

Click on the “Teams” tab located in the top-left corner of the Jira interface.

2. Invite People (Two Options)

Option 1: Click the “+” icon, then select “Invite people” from the dropdown.

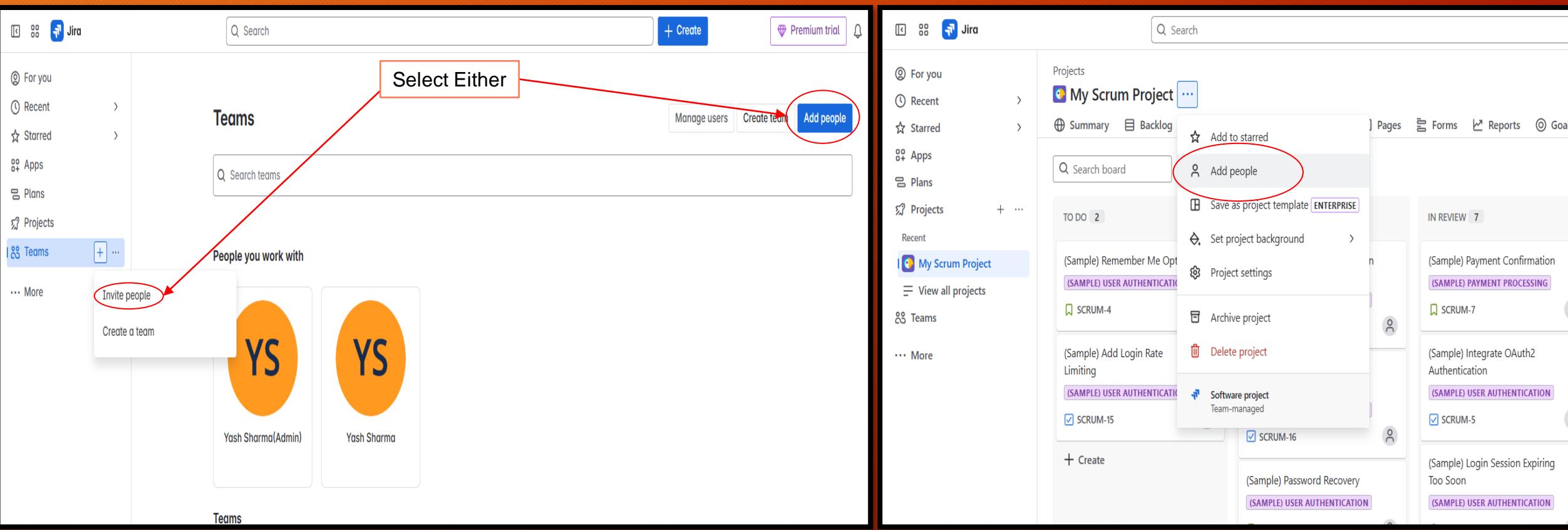
Option 2: In the Teams window, click the “Add people” button in the top-right corner.

OR

1. Open Your Project
From the Projects list, select the project where you want to add team members.

2. Open Project Options
Click the three dots (...) next to the project name at the top.

3. Select “Add People”
From the dropdown menu, click “Add people” to invite users and assign roles.

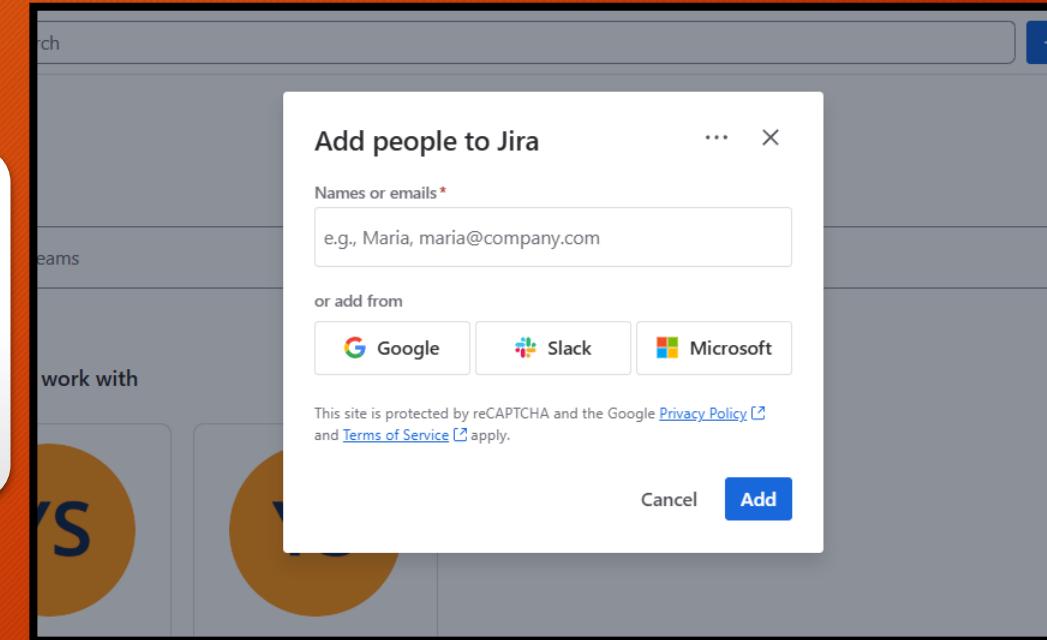


Step 2 :

“Add People to Jira” Window Appears
(After selecting “Add people”, a pop-up window will open.)

Enter Details and Invite
Type the person's **email address** in the input field.
Click “**Add**” to send the invitation.

Confirmation and Appearance in Teams
Once the invitee **accepts the invitation**, their name will appear in the **“People you work with”** section in the **Teams** view.



A screenshot of the Jira "Teams" view. At the top, there are search and creation buttons ("Search", "+ Create", "Premium trial"). Below the search bar is a "Teams" section with a "Search teams" input. A red box highlights the "People you work with" section, which lists "Yash Sharma (Admin)" and "Yash Sharma". Arrows point from the "Manage users" and "Create team" buttons in the main header to this section. At the bottom, there is a "Teams" section showing a team named "myscrumprojectteam" with 2 members.

Next Steps After Adding People

Create teams

Manage Users

Assign Tasks To People

Next Slide

Steps to Assign Tasks in Jira

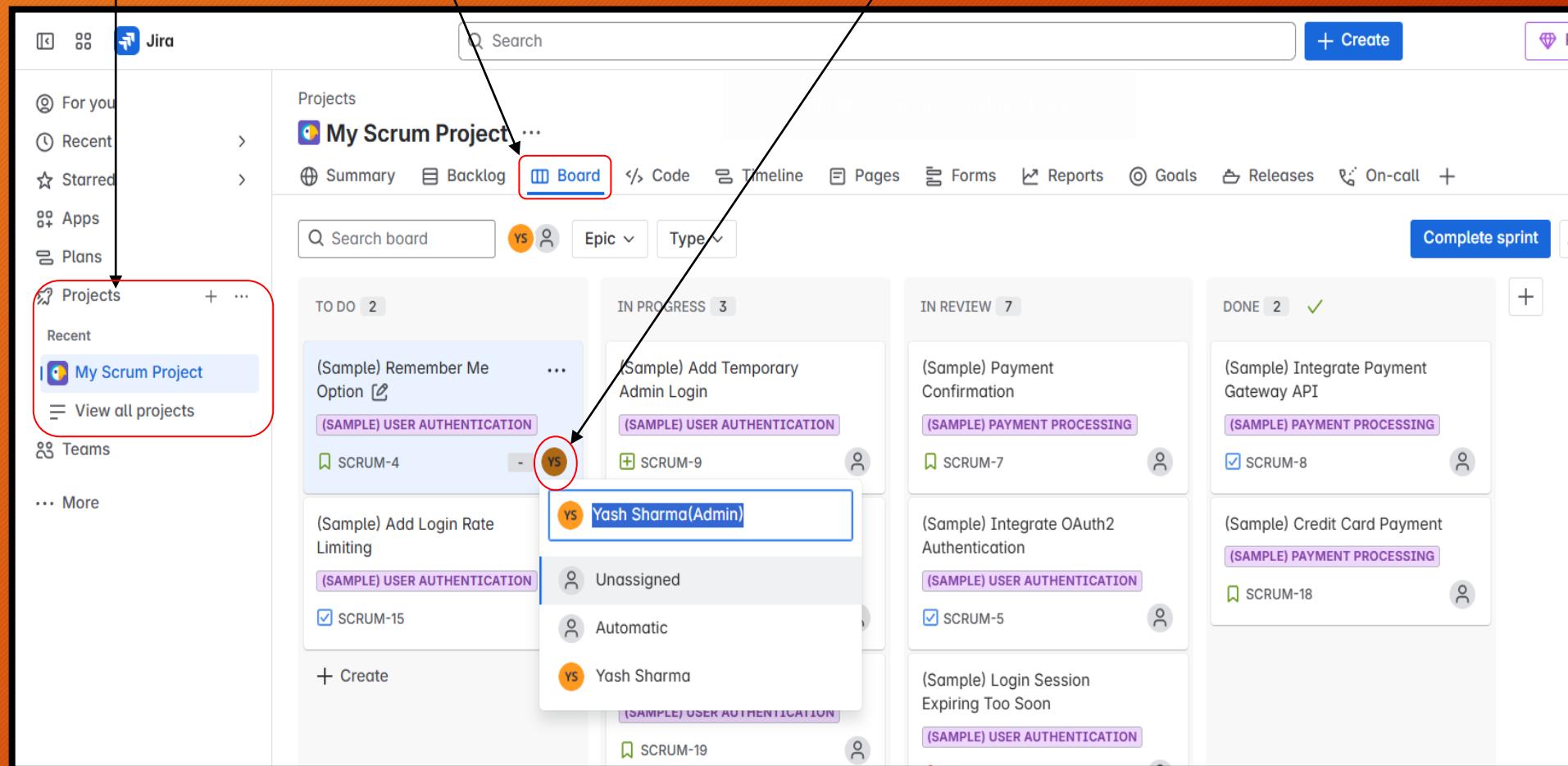
1 Open the correct project

2 Switch to Board view

3 Hover to the work item
(story, task, or bug.)

4 Click the assignee icon
(Find the circle at bottom-right.)

5 Select a team member
(Click the person's name to assign.)



3. Creating Work Items in Jira

This section covers how to create tasks, user stories, epics, and bugs directly in the backlog view of a Jira project.

Step 1. Navigate to the Create Icon

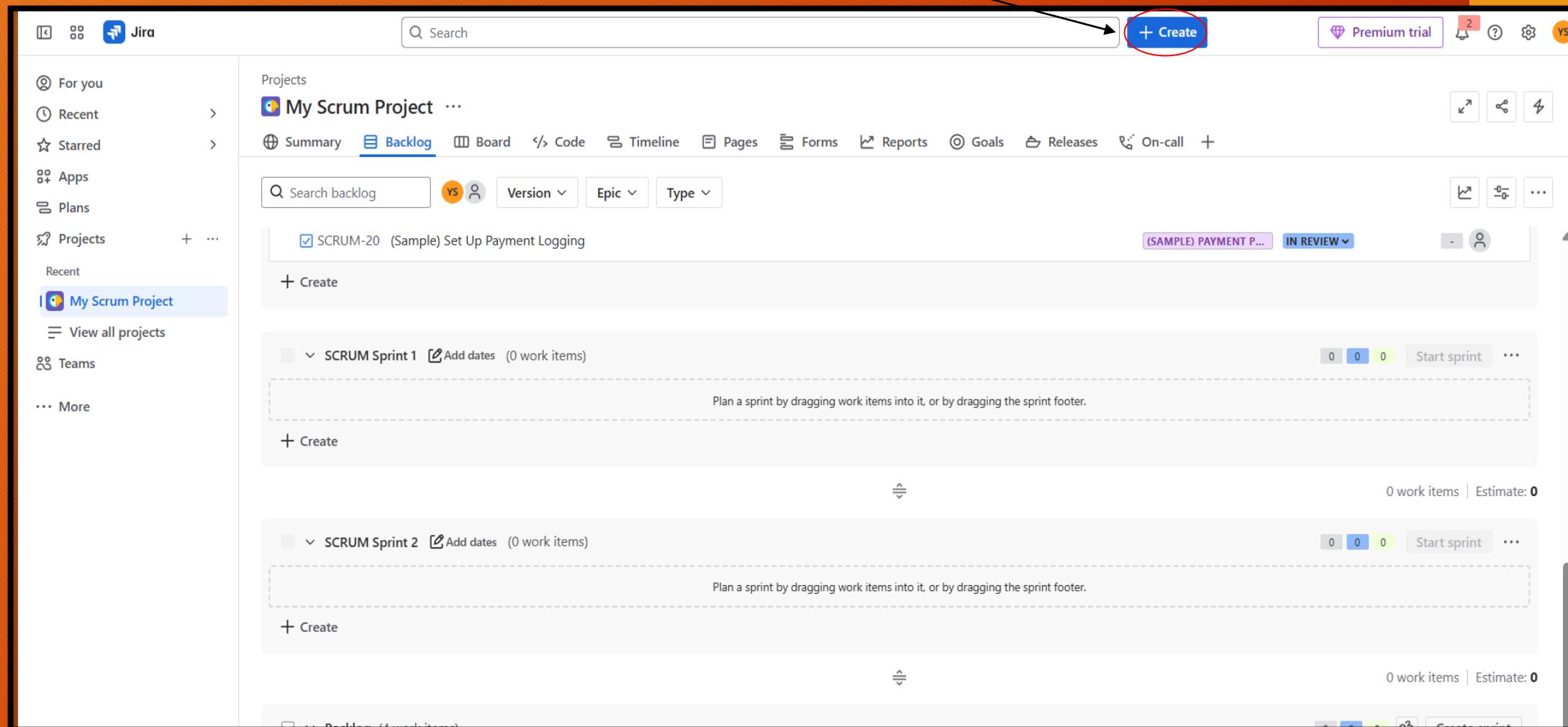
- Locate the “Create (+)” icon next to the **search bar** at the **top center** of the Jira interface.

Step 2. Click the Create Button

- Click on the **Create** icon to open the task creation window.

Step 3. Create Task Popup Appears

- The “Create Task” popup will appear, where you can enter details for your task, story, epic, or bug.



Project

- Select the Project From the dropdown list in which the work item needs to be created

Work Type

- Select the needed work type from dropdown list (Tasks, Epic, User Story And Bug).

Status

- Here you can select the initial status of the work item.

Summary

- the **Summary** field is a **short, concise title** that briefly describes the task or issue

Description

- the **Description** field provides a **detailed explanation** of the task, issue, or request.

Create Task

Introduction to work items

Required fields are marked with an asterisk *

Project*

My Scrum Project (SCRUM)

Work type*

Task

[Learn about work types](#)

Status

To Do

This is the initial status upon creation

Summary*

Summary is required

Description

Tt **B** I ... A @ +

Paste a Confluence link here, and we can help generate the description from the page's contents.

Assignee

Automatic

[Assign to me](#)

Labels

Create another

Cancel **Create**

Assignee

- the **Assignee** field indicates **who is responsible** for completing the task.

Parent

- the **Parent** field is used to **link the current task or sub-task to a higher-level item**

Sprint

- the **Sprint** field is used to assign the task to a specific **time-boxed development cycle** within an Agile project

Story Point Estimate

- the **Story Point Estimate** field is used to represent the **relative effort or complexity** required to complete the task.

Create Task

Introduction to work items

Assignee



Automatic

Assign to me

Labels

Select label

Parent

Select parent

Your work type hierarchy determines the work items you can select here.

Team



Choose a team

Associates a team to an issue. You can use this field to search and filter issues by team.

Sprint

Select sprint

Jira Software sprint field

Story point estimate

Measurement of complexity and/or size of a requirement.

Fix versions

None

Create another

Cancel

Create

Reporter

- the Reporter field identifies the person who created or raised the task.

Now, press the ‘Create’ button to create the work item.

Once created, it will appear in the Backlog view of the project.

Create Task

Introduction to work items

Jira Software sprint field

Story point estimate

Measurement of complexity and/or size of a requirement.

Fix versions

None

Reporter *

ys Yash Sharma(Admin)

Attachment

Drop files to attach or

Linked work items

blocks

Select work item

Restrict to

Select Roles

Flagged

Impediment

Allows to flag issues with impediments.

Create another

Cancel

4. Creating a Sprint

This section explains how to create a new sprint in the backlog view and prepare it for task planning by adding selected work items.

Step 1:
Click on “Create Sprint” to add a new sprint in the backlog view.

Step 2:
Drag and drop the required work items into the newly created sprint.

Step 3:
Once all items are added, click “Start Sprint”.

Result:
The selected items will move to the To Do list in the Board View.

The screenshot shows the Jira Software interface in the Backlog view for the project "My Scrum Project".

The interface includes a sidebar with navigation links like "For you", "Recent", "Starred", "Apps", "Plans", "Projects", "Teams", and "More". The main area displays three sprints:

- SCRUM Sprint 2:** Contains a note "Plan a sprint by dragging work items into it, or by dragging the sprint footer." and a "Start sprint" button.
- Backlog:** Contains 4 work items: "SCRUM-3 (Sample) Recurring Payments", "SCRUM-10 (Sample) Save Payment Method", "SCRUM-11 (Sample) Finance Team Export Format", and "SCRUM-12 (Sample) Create Payment Retry Logic". It also includes a note "Plan a sprint by dragging work items into it, or by dragging the sprint footer." and a "Create sprint" button.
- SCRUM Sprint 1:** Contains a note "Plan a sprint by dragging work items into it, or by dragging the sprint footer." and a "Start sprint" button.

A dashed arrow points from the "Create sprint" button in the SCRUM Sprint 1 section to the "Start sprint" button in the SCRUM Sprint 2 section, indicating the flow of the process described in the steps above.

Sprint Progress and Completion Steps:

1. Track Progress:

Once the sprint starts, your work items will appear in the **To Do** list on the **Board View**.

2. Move Tasks Through Phases:

As work progresses, drag and drop items from **To Do** to **In Progress**, and then to **Done**.

3. Complete the Sprint:

At the end of the sprint (or when all tasks are completed), click on "**Complete Sprint**" in the Board View to close it.

The screenshot shows the Jira Board View for a project named "My Scrum Project". The board is divided into four columns: TO DO, IN PROGRESS, IN REVIEW, and DONE. Each column contains several task cards with titles like "(Sample) Remember Me Option", "(Sample) Add Temporary Admin Login", etc., and labels such as "(SAMPLE) USER AUTHENTICATION" or "(SAMPLE) PAYMENT PROCESSING". Some cards have checkmarks or status indicators. On the far right, there is a blue button labeled "Complete sprint". A red circle highlights this button, indicating it is the target for the third step. The top navigation bar includes "Search", "+ Create", and a "Premium trial" badge. The left sidebar shows project navigation with "My Scrum Project" selected.

Conclusion

- ✓ Understood how to navigate Jira and its panels like Backlog, Board, Reports, and more.
- ✓ Learned to create and manage work items such as Tasks, Stories, Epics, and Bugs.
- ✓ Covered sprint creation, assigning tasks, and moving them across the workflow.
- ✓ Explored real-time tracking of work progress using Board View.
- ✓ Finalized the process by completing the sprint once all work is done.
- ✓ Compared Scrum vs Kanban, and how Jira adapts to both methodologies.

Jira empowers Agile teams to plan smarter, collaborate better, and deliver faster.

Thank You!

Master your sprints. Deliver with clarity.

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