



Tutorial on JIRA

By World Of Agile

Jira Tutorial

What is Jira

Jira is a software application developed by company named Atlassian. Jira is a very popular tool that allows teams to track issues, manage projects, and automate workflows. Agile development teams widely use this tool for managing their projects. Jira is also used as an issues and bugs tracking system.

Mobile App

JIRA is available as a Mobile Application as well.

It is available on Google Play Store and App Store (iTunes) of Apple.

Easy to stay connected with the team while moving anywhere with notification, comments and project activity.

Multilingual

JIRA supports more than 10 languages those are widely used as English (US, UK, India), French, German, Portuguese, Spanish, Korean, Japanese and Russian.

Introduction to Jira:

This tutorial on Jira introduces the readers to the fundamental features and usage of JIRA.

Core Jira Features

There are 6 core JIRA features. Listed below are important and commonly used features in detail for better understanding.

Feature	Description
Boards	JIRA supports Scrum and Kanban boards. These boards provide an immediate snapshot of the project to the team.

	<p>Helps to quickly review the progress of the project and see the status of the individual tasks.</p> <p>Board workflow can be customized to fulfil the way a team wants to proceed.</p>
Task Details	<p>Tasks can be defined at the individual level to track the progress.</p> <p>Status of every task, comment, attachment and due dates are stored in one place.</p>
Business Project Template	<p>JIRA supports n number of business templates to manage simple tasks and complex tasks like workflow.</p> <p>Template can be customized based on the team and their approach. Ex: Workflow can be customized based on each team's approach.</p> <p>Every step is accounted and team can move to achieve their goals.</p>
Notifications	<p>An email can be sent for a particular task to the users.</p> <p>Voting and watching features to keep an eye on the progress for the stakeholders.</p> <p>Use @mention to get the attention of a specific team member at Comments/Description.</p> <p>User will instantly notify if something is assigned or if any feedback is required.</p>
Power Search	<p>JIRA supports a powerful search functionality with Basic, Quick and Advanced features.</p> <p>Use the search tool to find answers like due date, when a task was last updated, what items a team member still needs to finish.</p>

	Project information at one place, search within a project.
Reports	<p>JIRA supports more than a dozen reports to track progress over a specific timeframe, deadlines, individual's contribution, etc.</p> <p>Easy to understand and generate different reports those help to analyze how the team is going on.</p> <p>Easy to configure these reports and display the matrices to the stakeholders.</p>

How to install Jira?

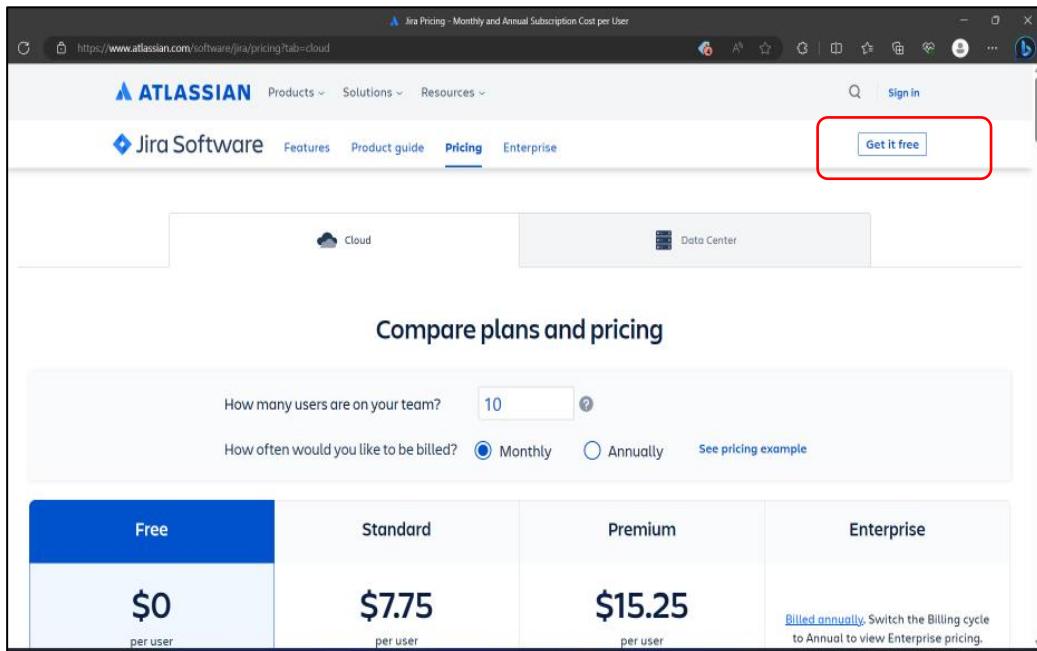
Points to Note

- JIRA is a web application that provides a private website to an individual or a set of requested users belonging to the same company/project.
- JIRA can be run as a Windows Service at the server side.
- JIRA is a pure Java based application and supports all OS platforms like Windows, Linux of different versions or MAC, etc., those satisfy JDK/JRE requirements.
- JIRA supports all famous browsers like Chrome, IE, Mozilla and Safari.
- It supports Mobile browsers as well in mobile views.

Use Web-based Jira Instance

Steps to Follow:

1. Go to Atlassian Website. [– Click Here](#)
2. Click on “Get it Free”



Jira Pricing - Monthly and Annual Subscription Cost per User

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Jira Software Features Product guide **Pricing** Enterprise

Cloud Data Center

Get it free

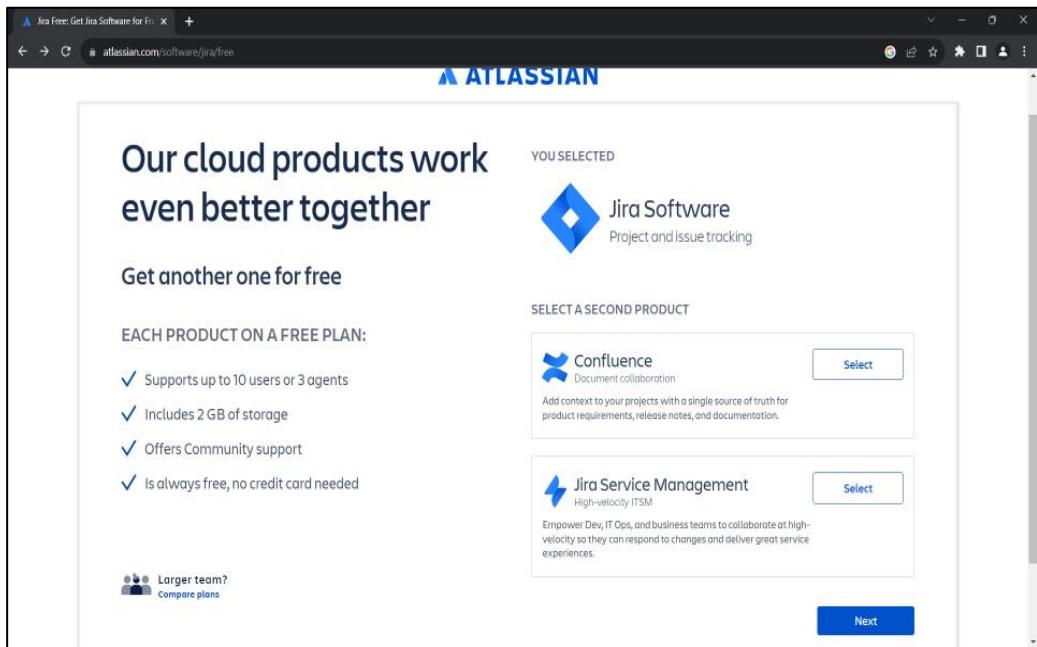
Compare plans and pricing

How many users are on your team? ?

How often would you like to be billed? Monthly Annually See pricing example

Free	Standard	Premium	Enterprise
\$0 per user	\$7.75 per user	\$15.25 per user	Billed annually. Switch the Billing cycle to Annual to view Enterprise pricing.

3. Product information page will open. Click "Next"



atlassian.com/software/jira/free

ATLASSIAN

Our cloud products work even better together

YOU SELECTED

Jira Software
Project and issue tracking

Get another one for free

EACH PRODUCT ON A FREE PLAN:

- ✓ Supports up to 10 users or 3 agents
- ✓ Includes 2 GB of storage
- ✓ Offers Community support
- ✓ Is always free, no credit card needed

Larger team?
Compare plans

SELECT A SECOND PRODUCT

Confluence
Document collaboration

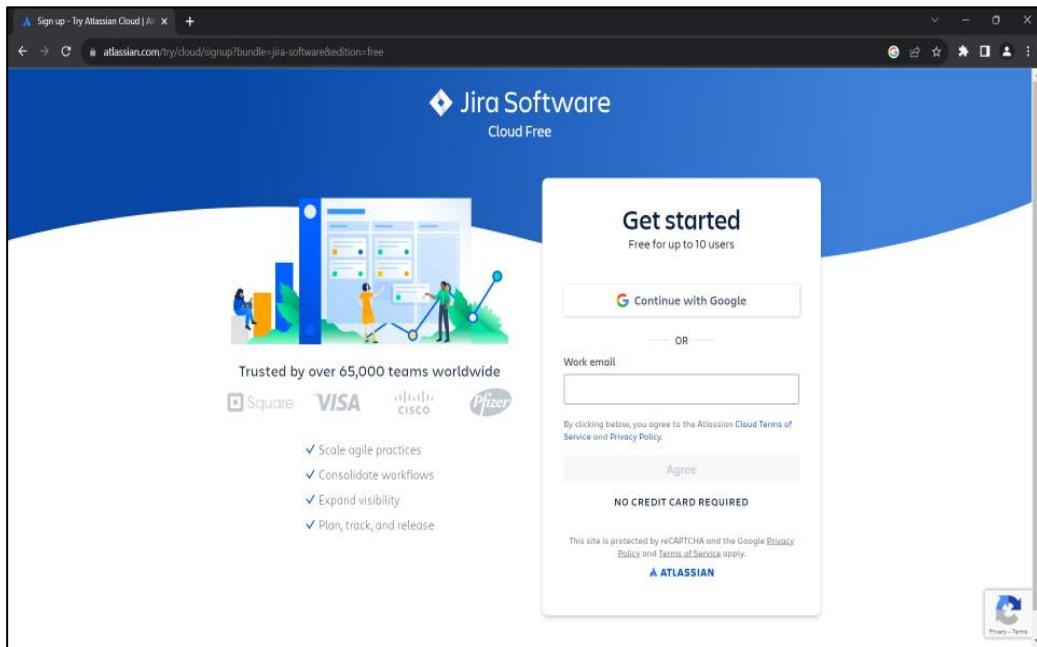
Select

Jira Service Management
High-velocity ITSM

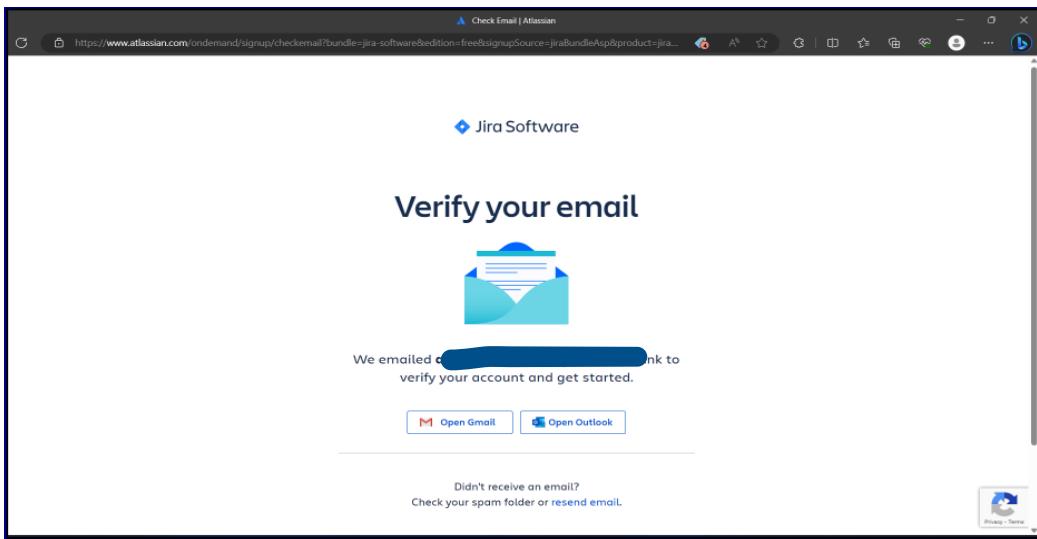
Select

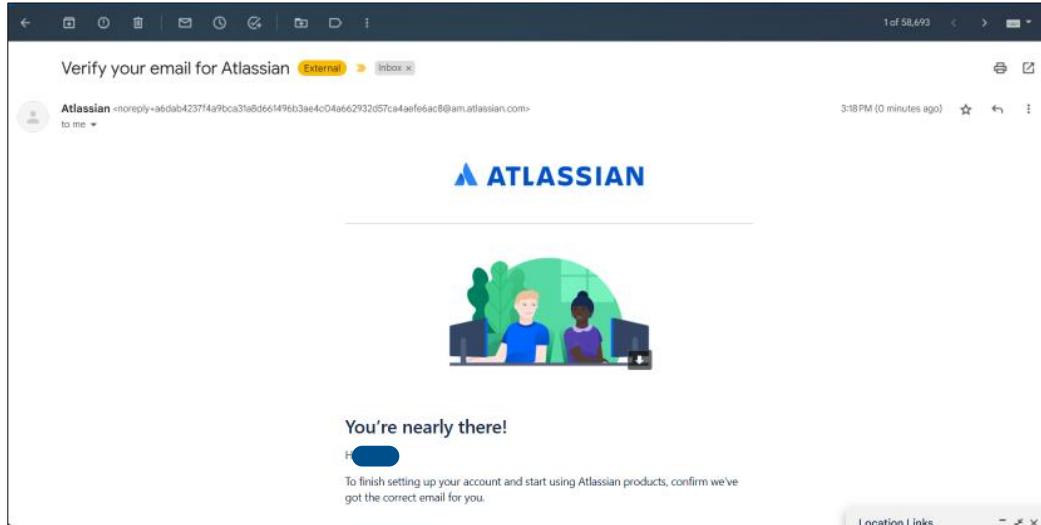
Next

4. Enter your email id for registration

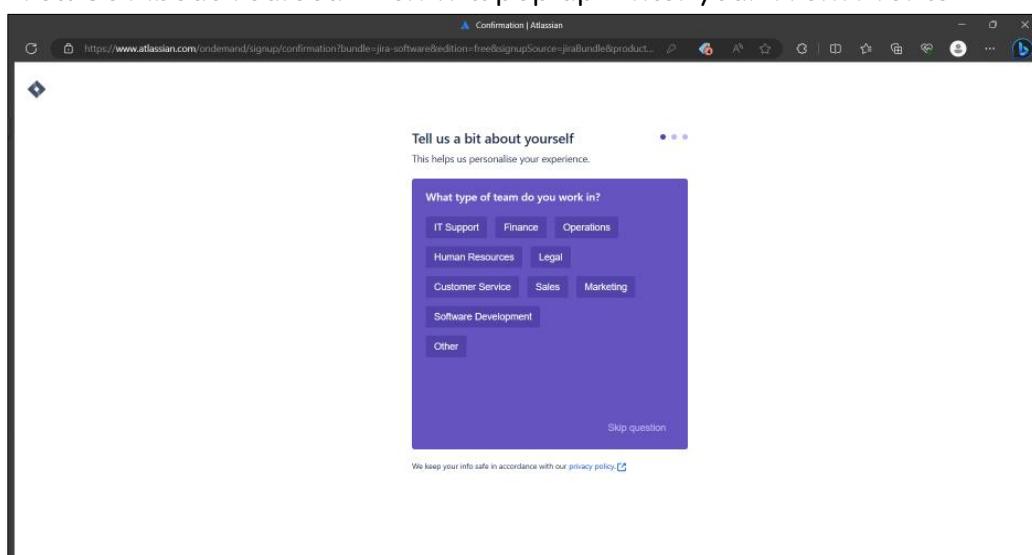


5. An email verification link will be sent to the email id you entered. Now verify the email id.

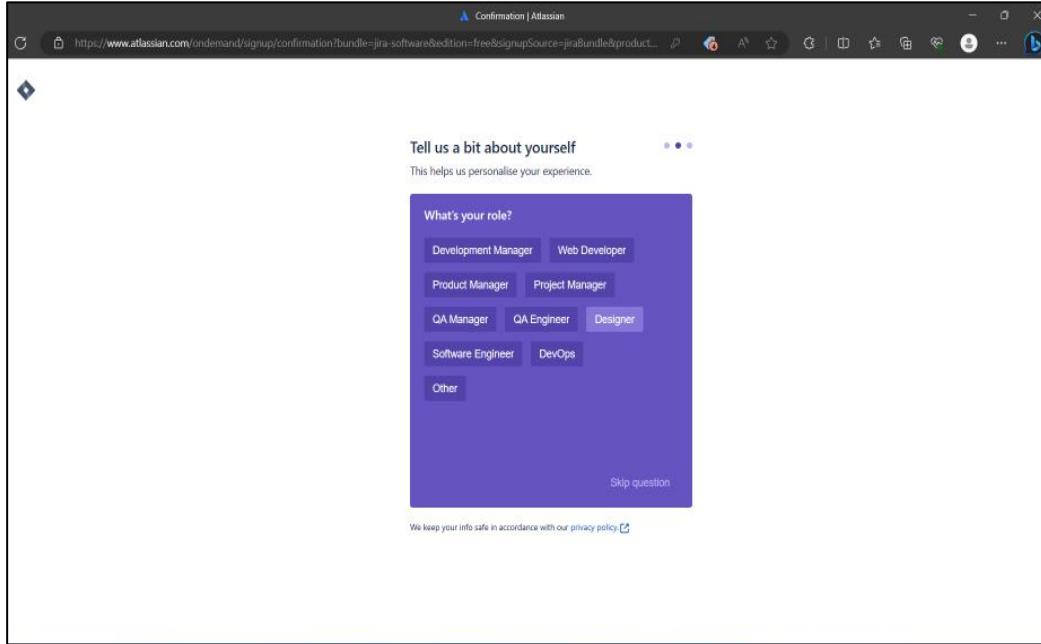




6. “Tell Us About Yourself” Box will pop up. Enter your Work Profile.

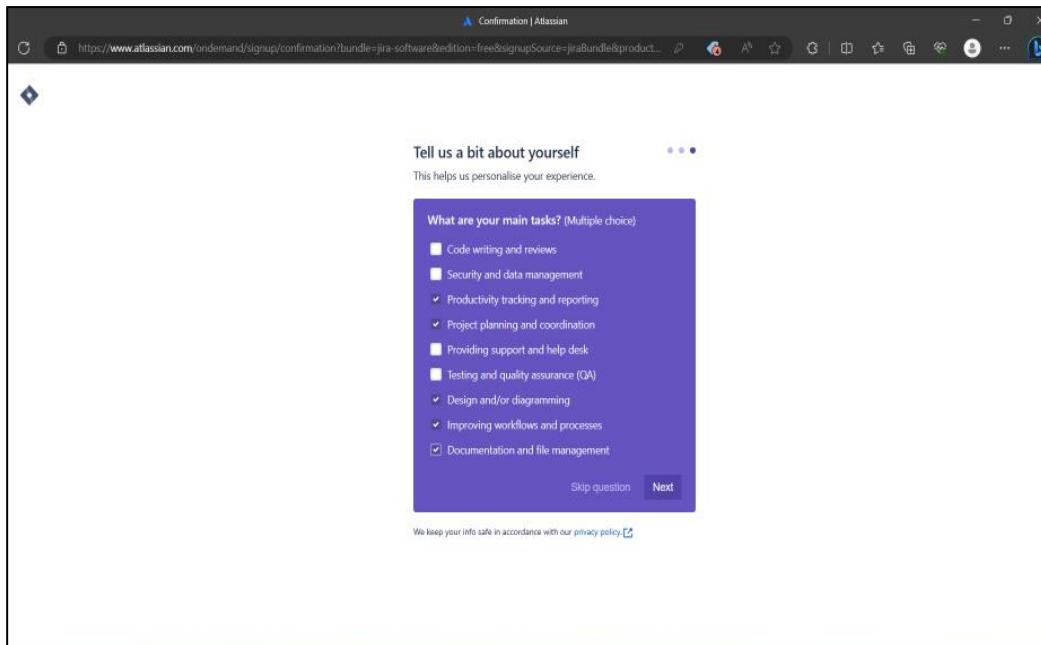


7. On the next prompt “Enter details about your role”



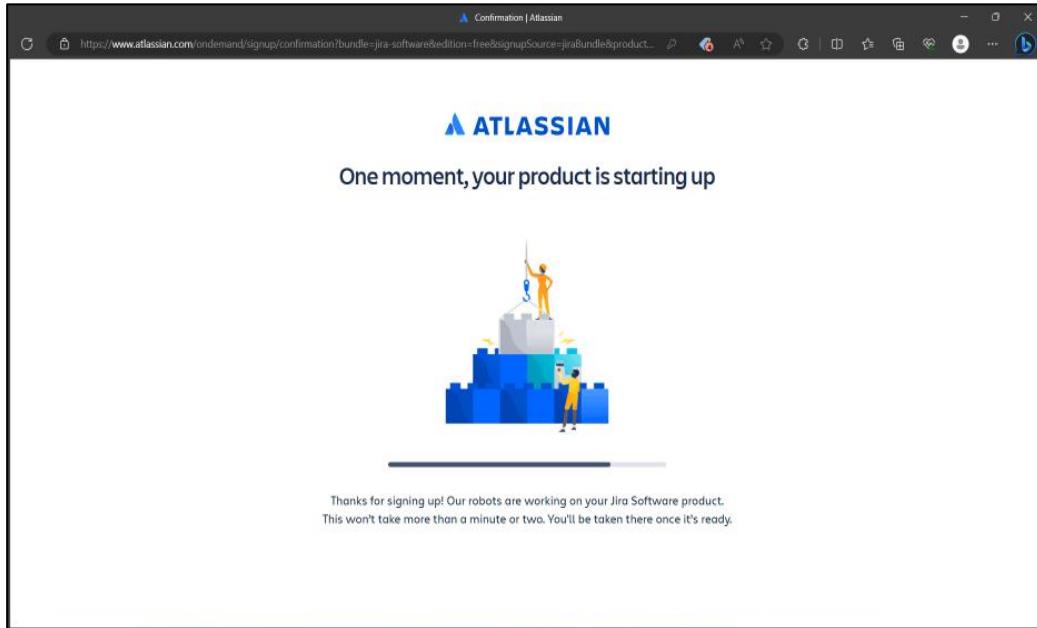
A screenshot of a web browser showing the 'Confirmation | Atlassian' page. The URL in the address bar is <https://www.atlassian.com/ondemand/signup/confirmation?bundle=jira-software&edition=free&signupSource=jiraBundle&product...>. The page displays a survey question: 'Tell us a bit about yourself' with the sub-instruction 'This helps us personalise your experience.' Below the question is a purple rectangular form titled 'What's your role?'. It contains several buttons for selecting a role: Development Manager, Web Developer, Product Manager, Project Manager, QA Manager, QA Engineer, Designer, Software Engineer, DevOps, and Other. At the bottom right of the form are 'Skip question' and 'Next' buttons. A small note at the bottom of the page states: 'We keep your info safe in accordance with our [privacy policy](#)'.

8. Now Enter your Tasks

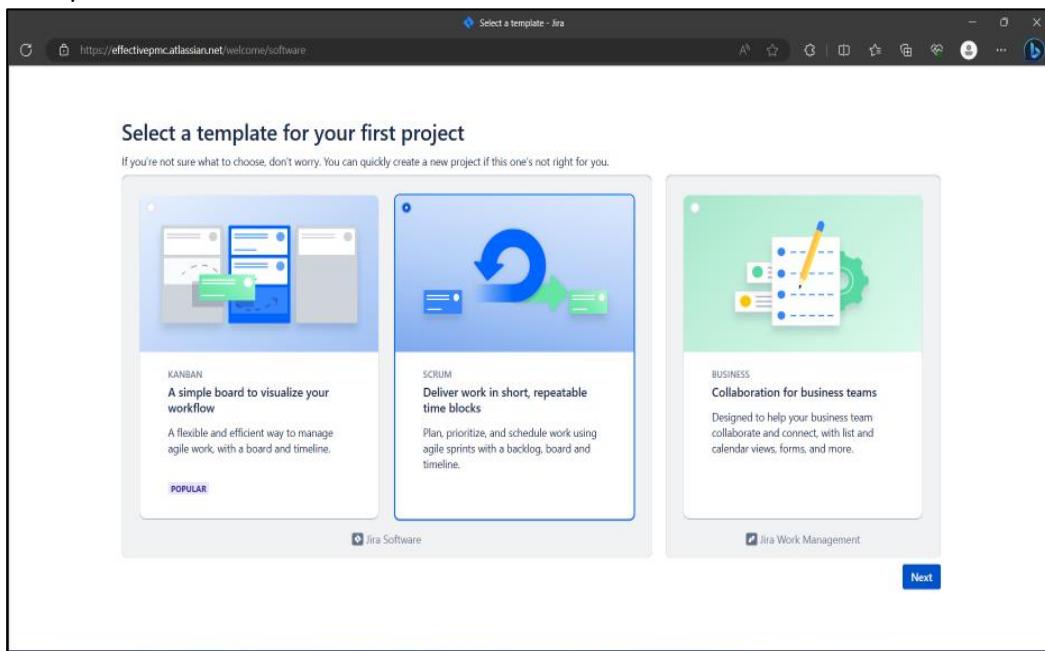


A screenshot of a web browser showing the 'Confirmation | Atlassian' page. The URL in the address bar is <https://www.atlassian.com/ondemand/signup/confirmation?bundle=jira-software&edition=free&signupSource=jiraBundle&product...>. The page displays a survey question: 'Tell us a bit about yourself' with the sub-instruction 'This helps us personalise your experience.' Below the question is a purple rectangular form titled 'What are your main tasks? (Multiple choice)'. It contains a list of tasks with checkboxes: Code writing and reviews, Security and data management, Productivity tracking and reporting, Project planning and coordination, Providing support and help desk, Testing and quality assurance (QA), Design and/or diagramming, Improving workflows and processes, and Documentation and file management. Most checkboxes are checked. At the bottom right of the form are 'Skip question' and 'Next' buttons. A small note at the bottom of the page states: 'We keep your info safe in accordance with our [privacy policy](#)'.

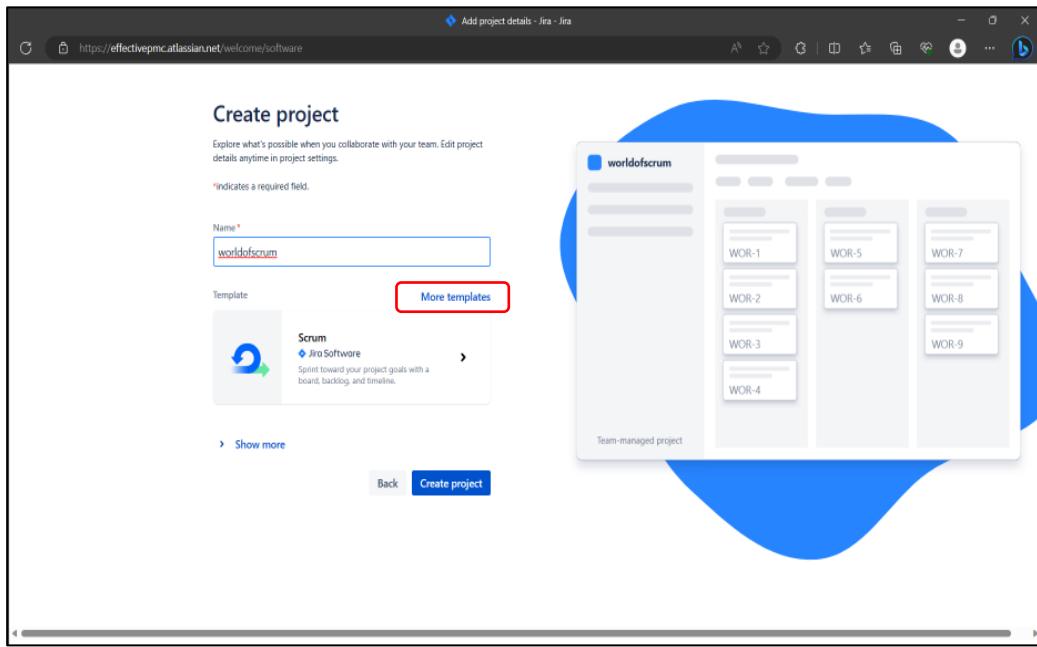
9. Now the setup will trigger.



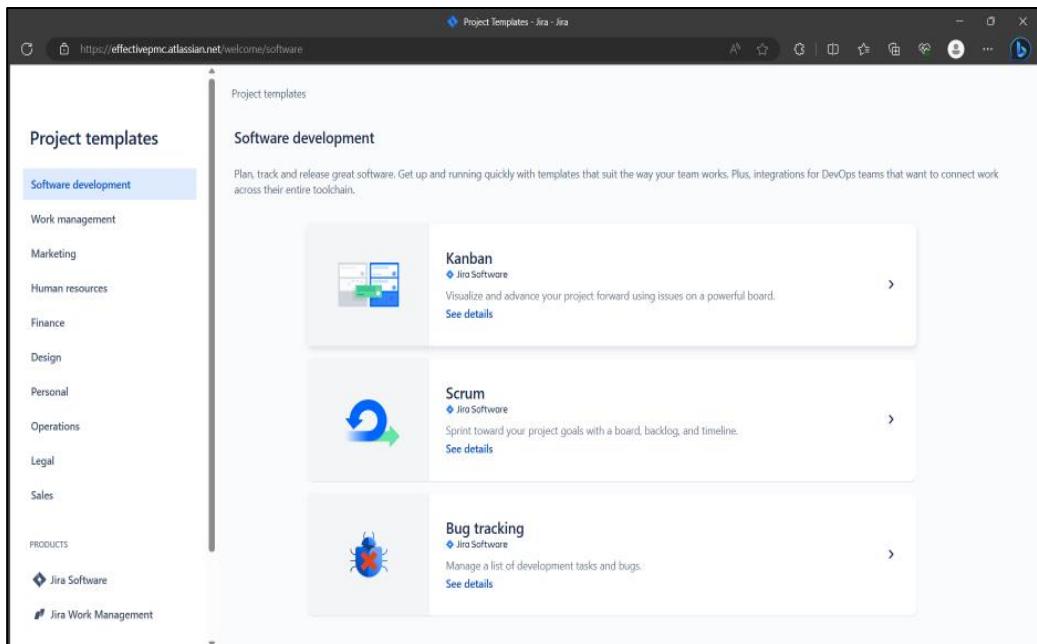
10. Setup will prompt to select the Project Type, It can be “Scrum” or “Kanban” or many more



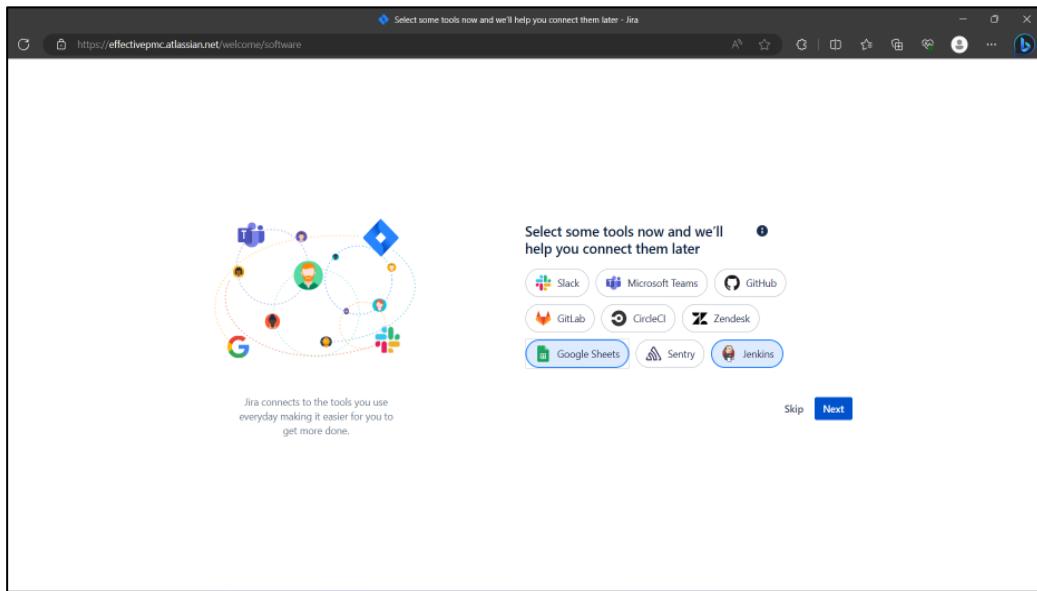
11. Name your project.



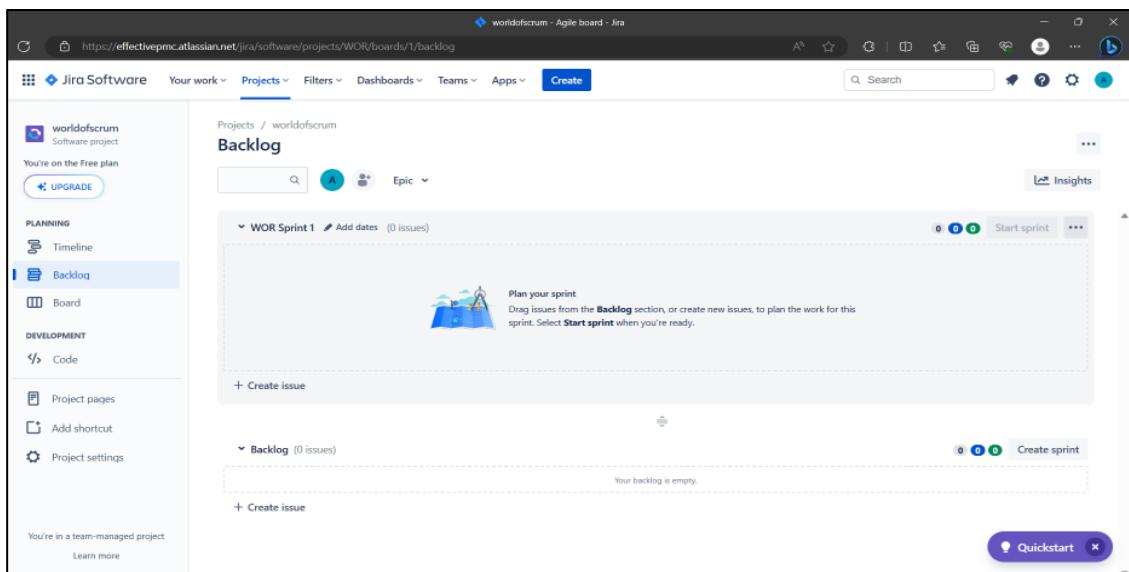
You can click on “More Templates” to view different project templates available.



12. If you want JIRA to work with other tools, pick them on the next screen.



13. After this final step, JIRA default dashboard will open to display your project. Start recording your project tasks and stories now.



Use Server-Side Jira Instance

System Requirements

Since JIRA is a web-application, it follows the concept of client/server. It means that JIRA can be installed centrally on a server and users can interact with it through web-browsers using a website from any computer.

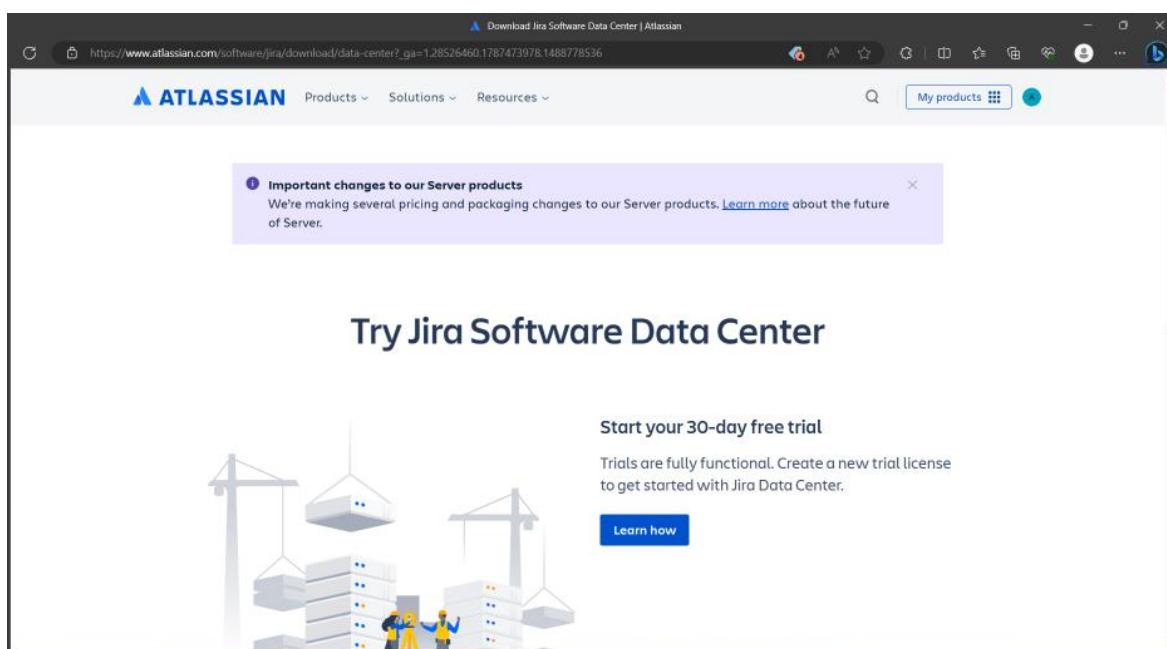
- **Browser** – JavaScript should be enabled, the user is recommended not to use any script-blocking tool like **NoScript** to access full functionality of JIRA.
- **JDK/JRE** – It is recommended to update JRE/JDK with the latest version. JIRA 9.0 recommends using JRE/JDK version 8.

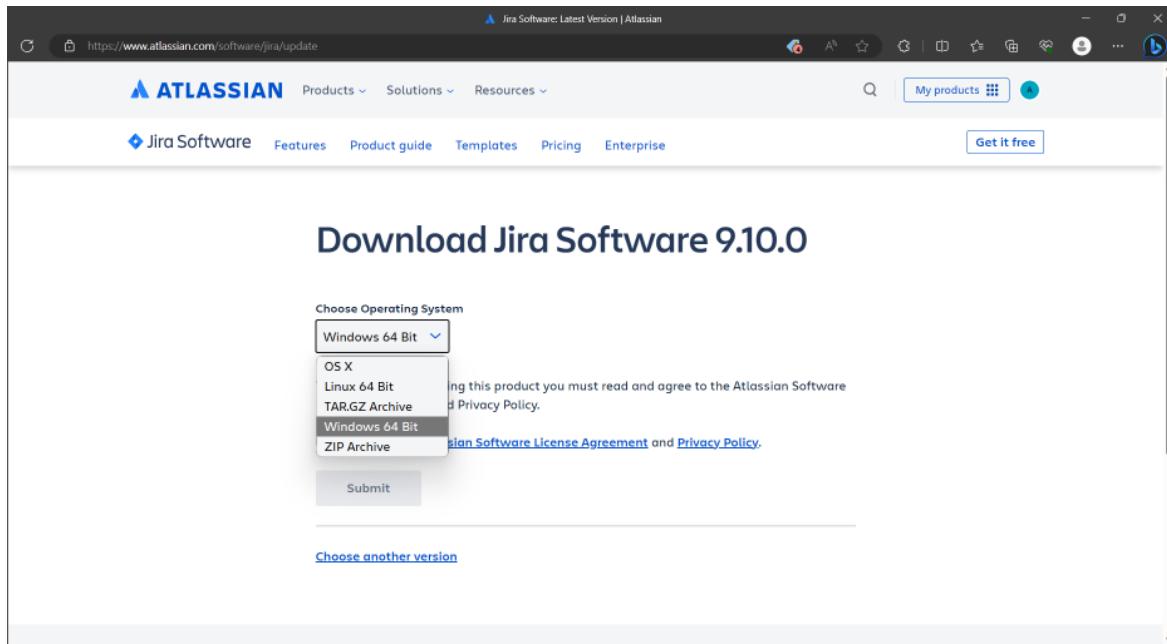
Since our scope is to consume the JIRA application as end users, we can ignore the server-side requirements.

Steps are as follows:

- JIRA follows the Client/Server concept. At the server side, JIRA must be installed before using it as end user.
- At the server side, JIRA must connect with relation database to store issues/application data.
- Download the JIRA **Windows Installer.exe** file from the following link – https://www.atlassian.com/software/jira/download?_ga=1.28526460.1787473978.1488778536.
- Select the OS type and click on Download.

The following screenshot shows how to download the .exe file for a specific OS.





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Download Jira Software 9.10.0

Choose Operating System

Windows 64 Bit

OS X

Linux 64 Bit

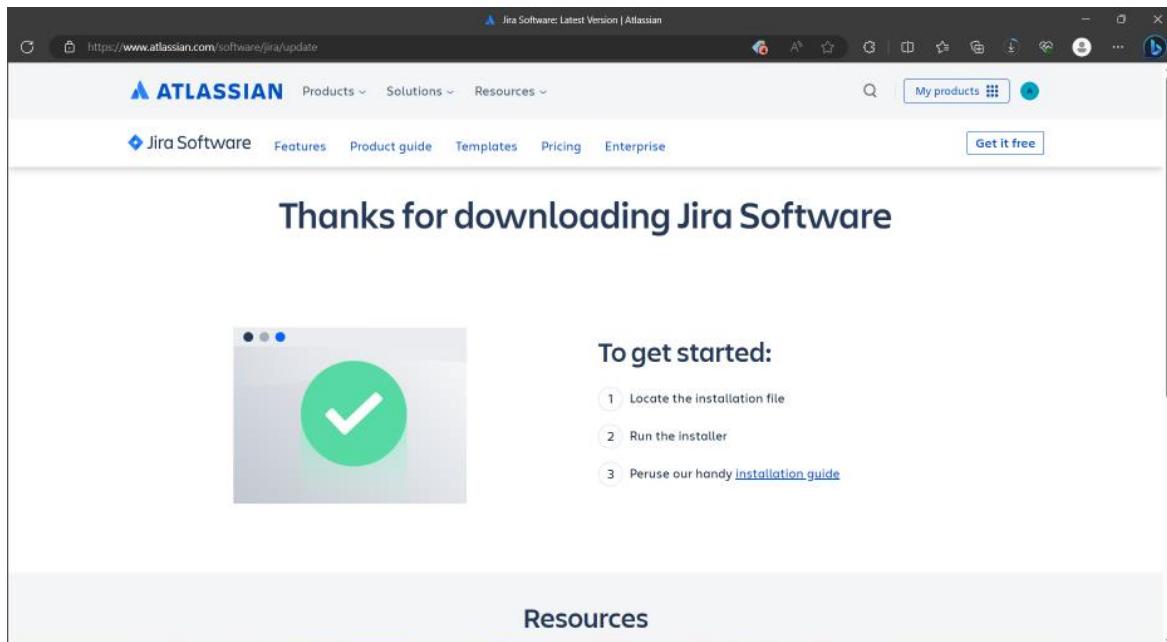
TAR.GZ Archive

Windows 64 Bit

ZIP Archive

Submit

[Choose another version](#)



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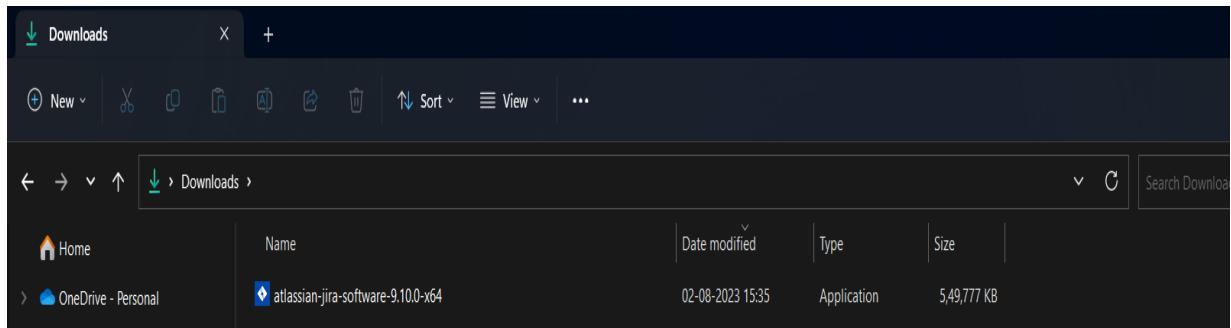
Thanks for downloading Jira Software

To get started:

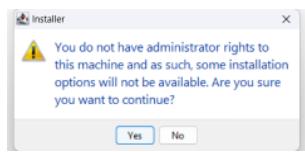
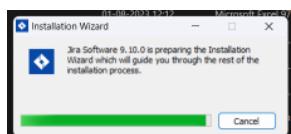
- Locate the installation file
- Run the installer
- Peruse our handy [installation guide](#)

Resources

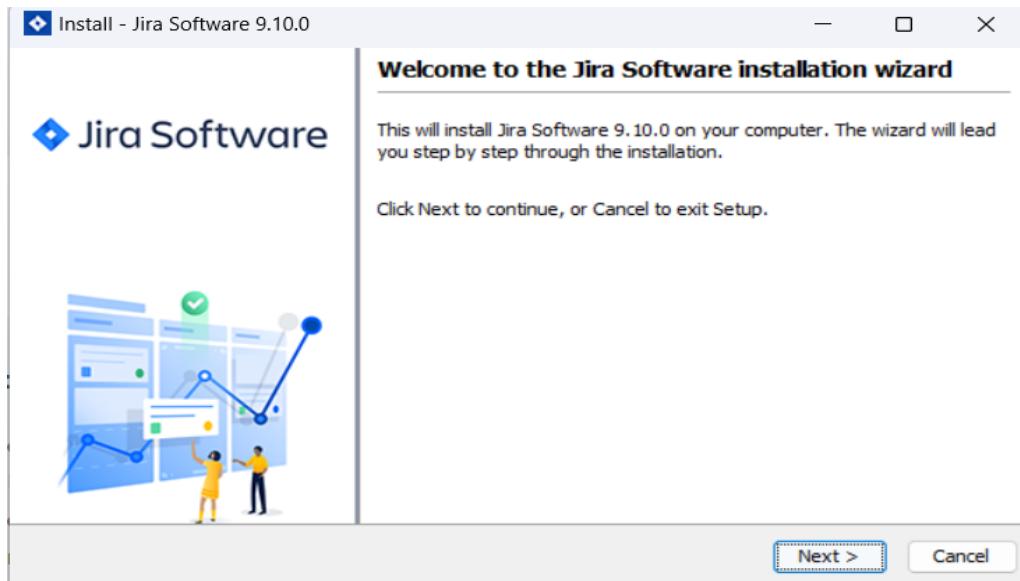
Run the .exe file to run the installation wizard. The following screenshot shows the downloaded .exe file.



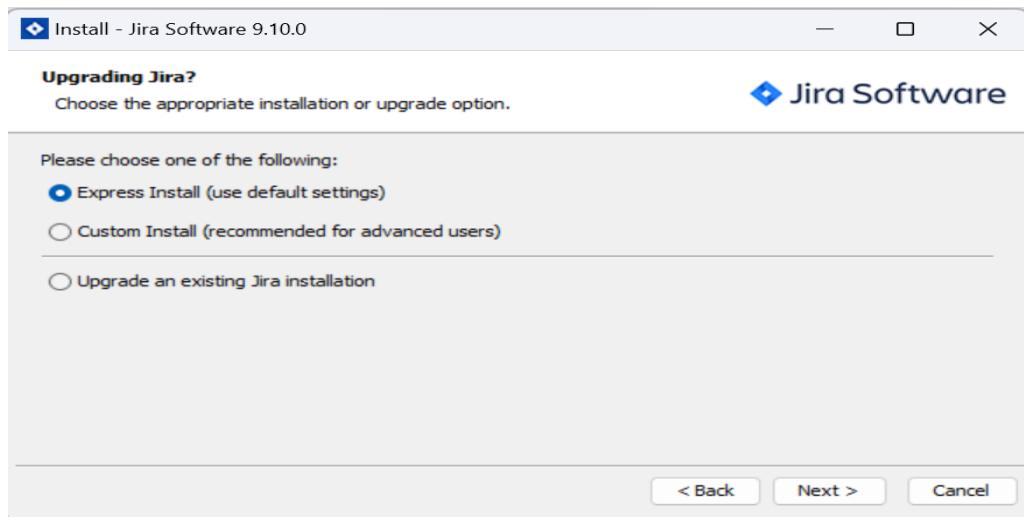
After clicking the .exe file, the **Run** confirmation pop-up displays, click on RUN. The following screenshot shows the RUN confirmation pop-up.



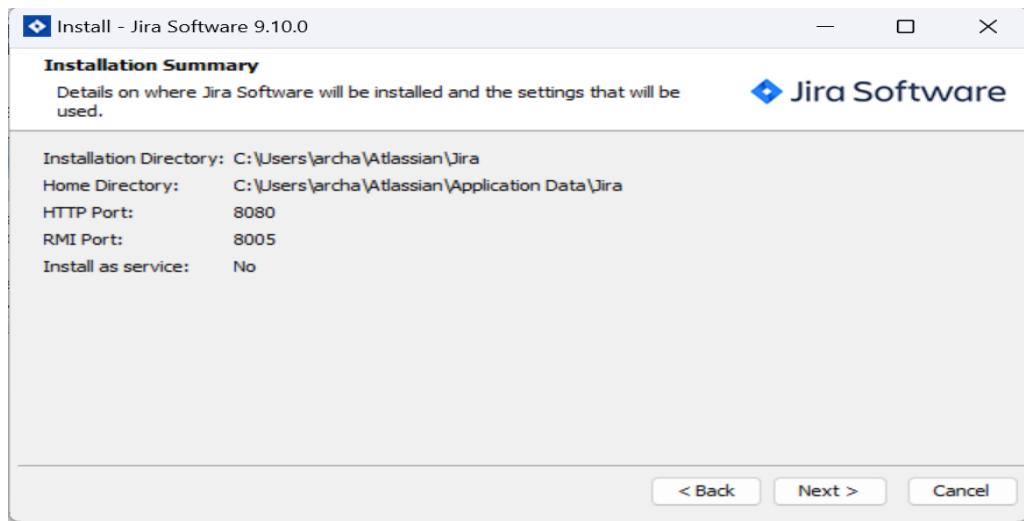
The following JIRA installation wizard displays, click on Next.



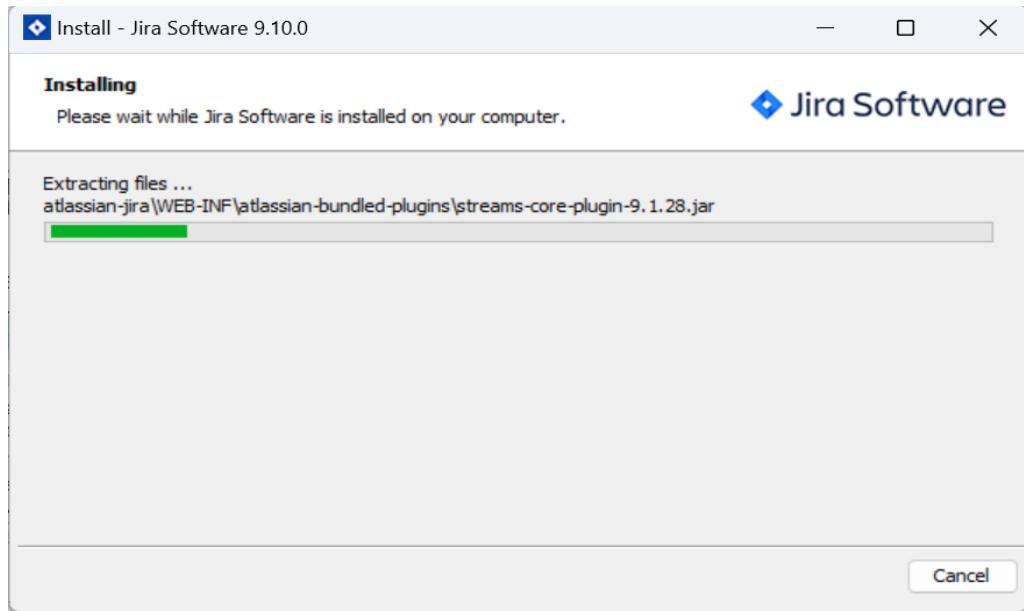
Choose the appropriate installation option as shown in following screenshot and then click on Next.



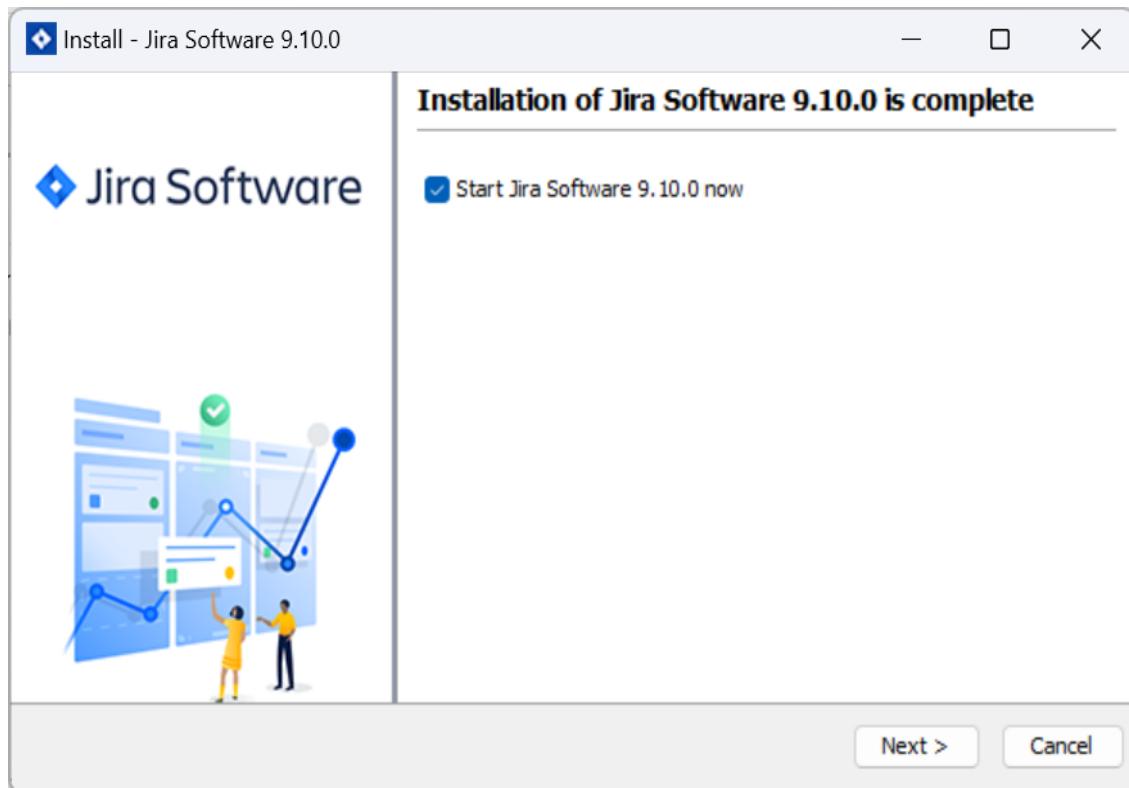
The installation summary is displayed with the Destination Directory, Home Directory, TCP Ports, etc., as shown in the following screenshot.



Click on Install. JIRA will start installing as displayed in following screenshot. It takes a couple of minutes to finish the installation.



After installation, JIRA will be started automatically if the check box to “Start JIRA Software 9.10.0 now” is checked. Then click on Next, if not, it can be accessed using the appropriate Windows Start Menu shortcut.

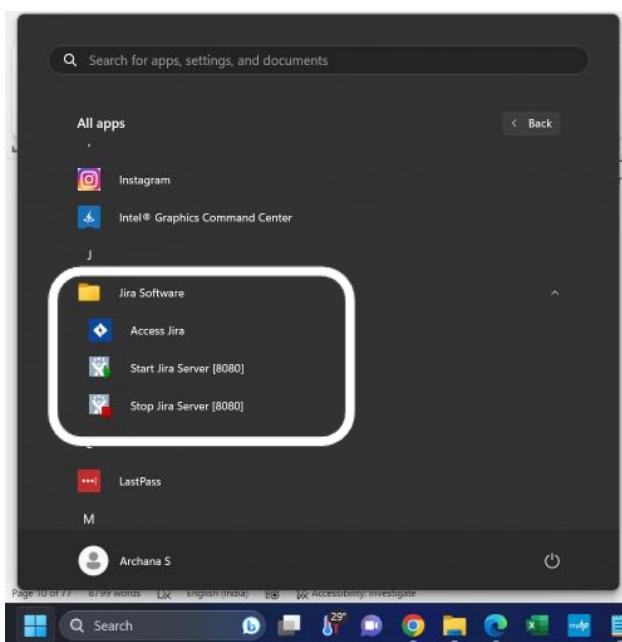


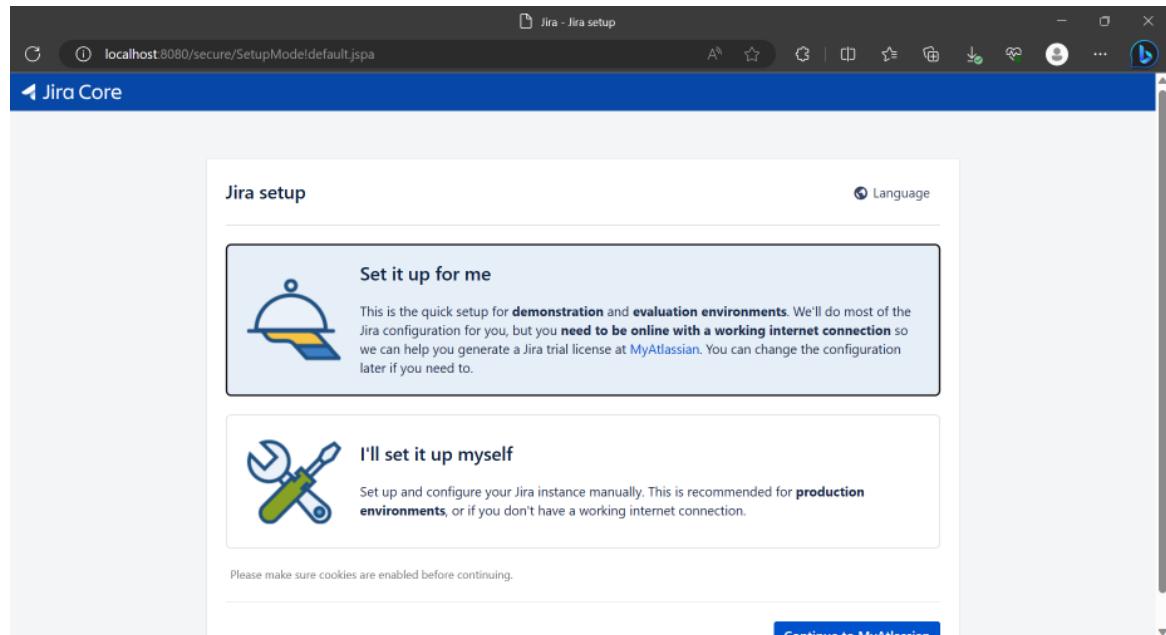
Click the Finish button.

The installer will create the following shortcuts on the start menu –

- Access JIRA
- Start JIRA Server
- Stop JIRA server
- Uninstall JIRA

The following screenshot shows the above-mentioned shortcuts –





Jira setup

Set it up for me

This is the quick setup for **demonstration** and **evaluation environments**. We'll do most of the Jira configuration for you, but you **need to be online with a working internet connection** so we can help you generate a Jira trial license at [MyAtlassian](#). You can change the configuration later if you need to.

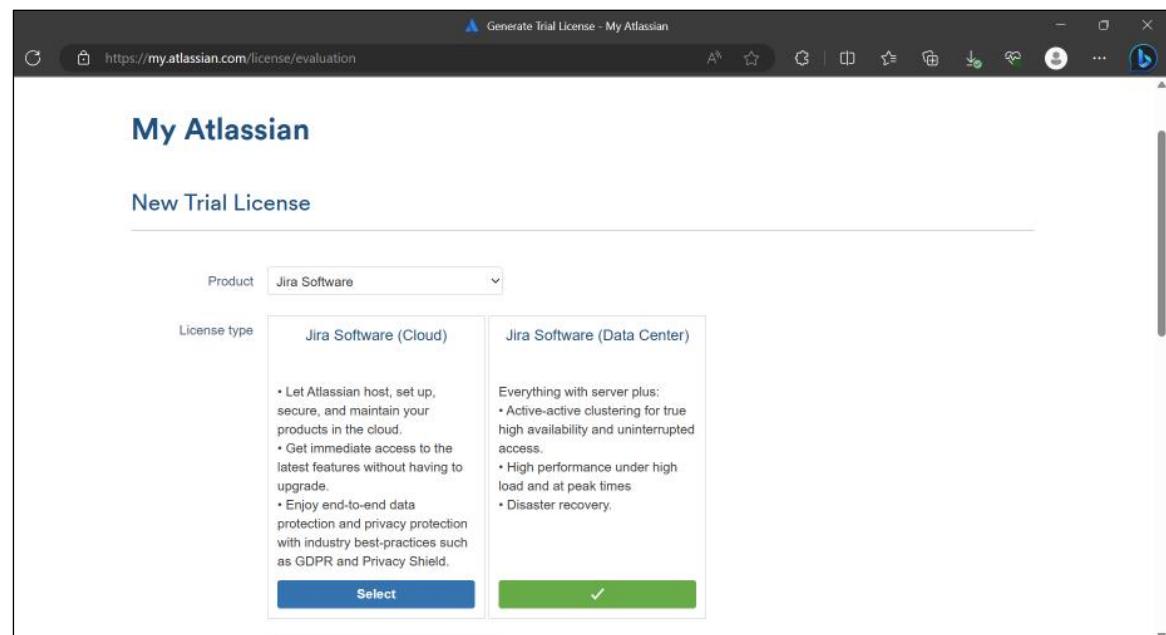
I'll set it up myself

Set up and configure your Jira instance manually. This is recommended for **production environments**, or if you don't have a working internet connection.

Please make sure cookies are enabled before continuing.

[Continue to MyAtlassian](#)

Select the license type and enter organization name as shown in following screenshot –



Generate Trial License - My Atlassian

https://my.atlassian.com/license/evaluation

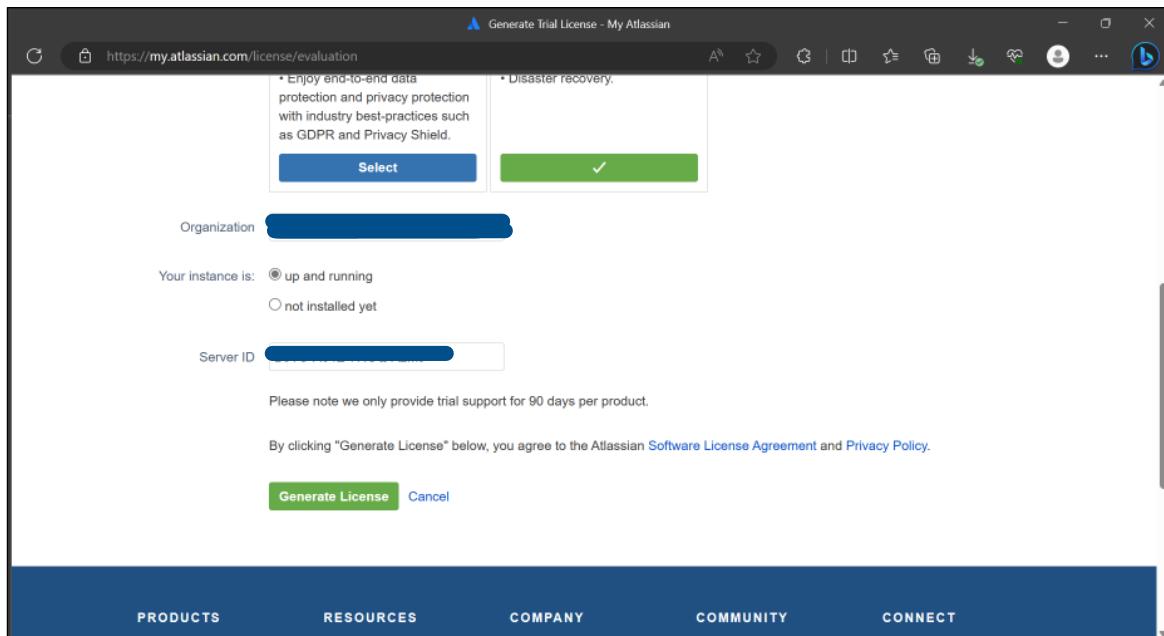
My Atlassian

New Trial License

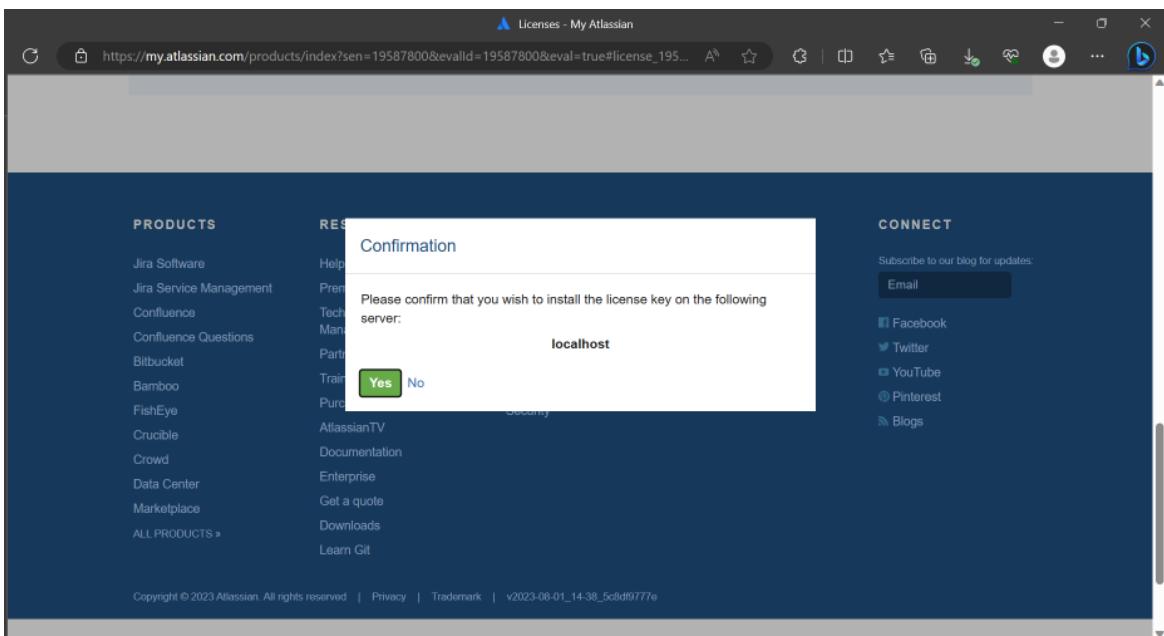
Product: Jira Software

License type	Jira Software (Cloud)	Jira Software (Data Center)
	<ul style="list-style-type: none">Let Atlassian host, set up, secure, and maintain your products in the cloud.Get immediate access to the latest features without having to upgrade.Enjoy end-to-end data protection and privacy protection with industry best-practices such as GDPR and Privacy Shield. Select	<p>Everything with server plus:</p> <ul style="list-style-type: none">Active-active clustering for true high availability and uninterrupted access.High performance under high load and at peak timesDisaster recovery. ✓

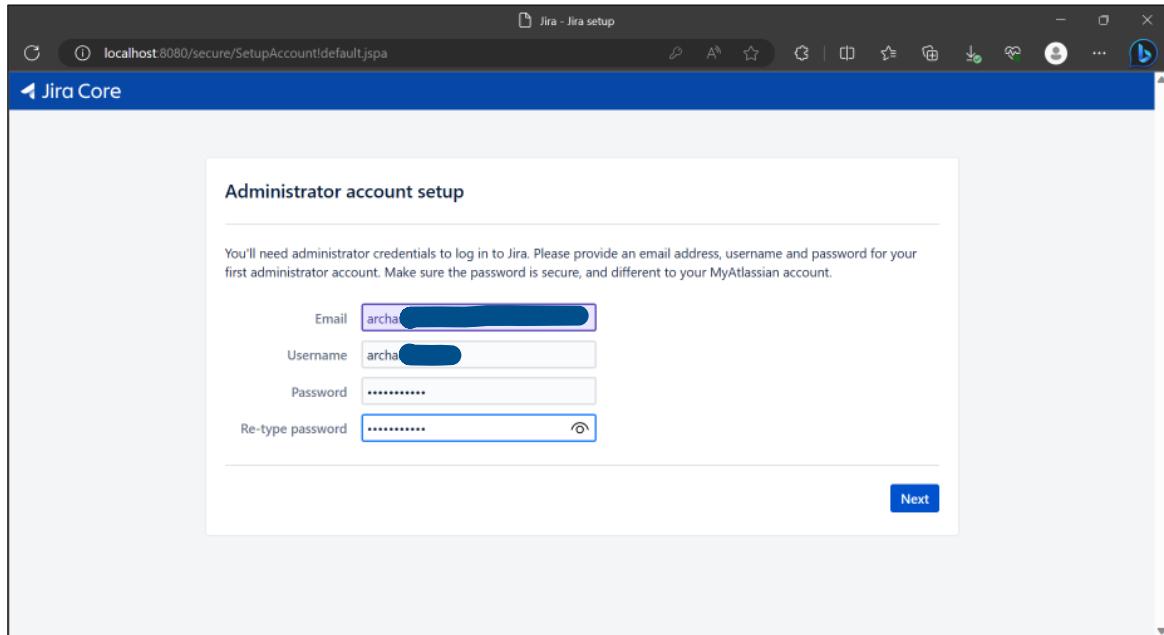
Click on Generate License



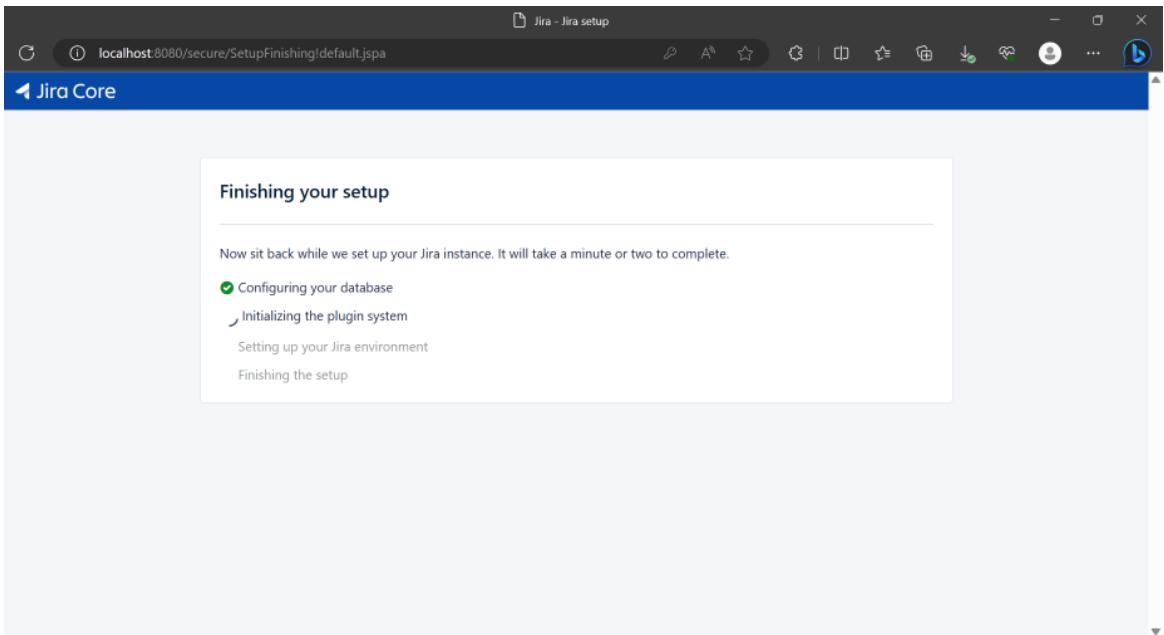
A confirmation pop-up will display as shown in the following screenshot. Click on Yes.



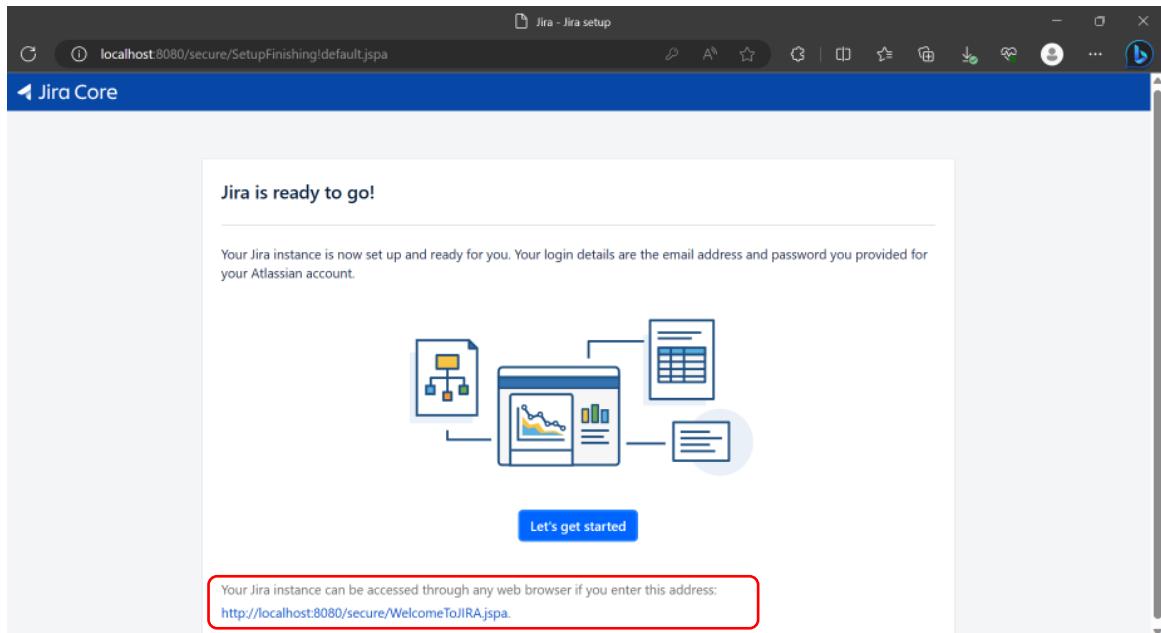
Set up the administration account as displayed in the following screenshot.



JIRA will automatically finish the setting-up as shown below –

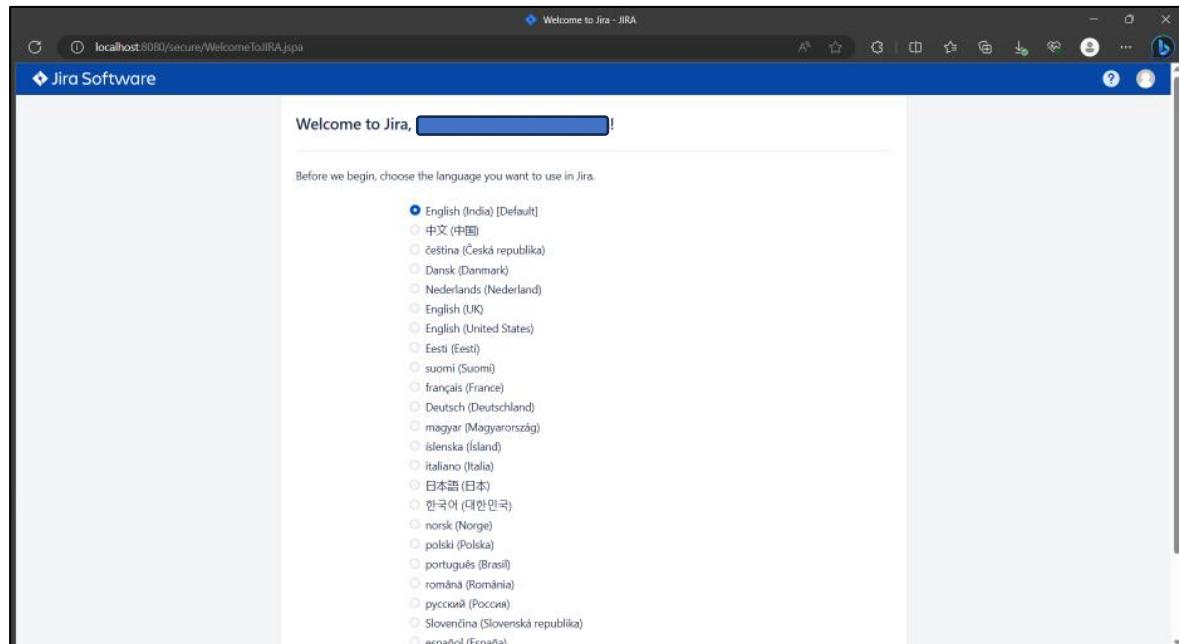


Once JIRA finishes the setup and starts running in the server, the user can access it from a browser on any computer with network access to the JIRA server.

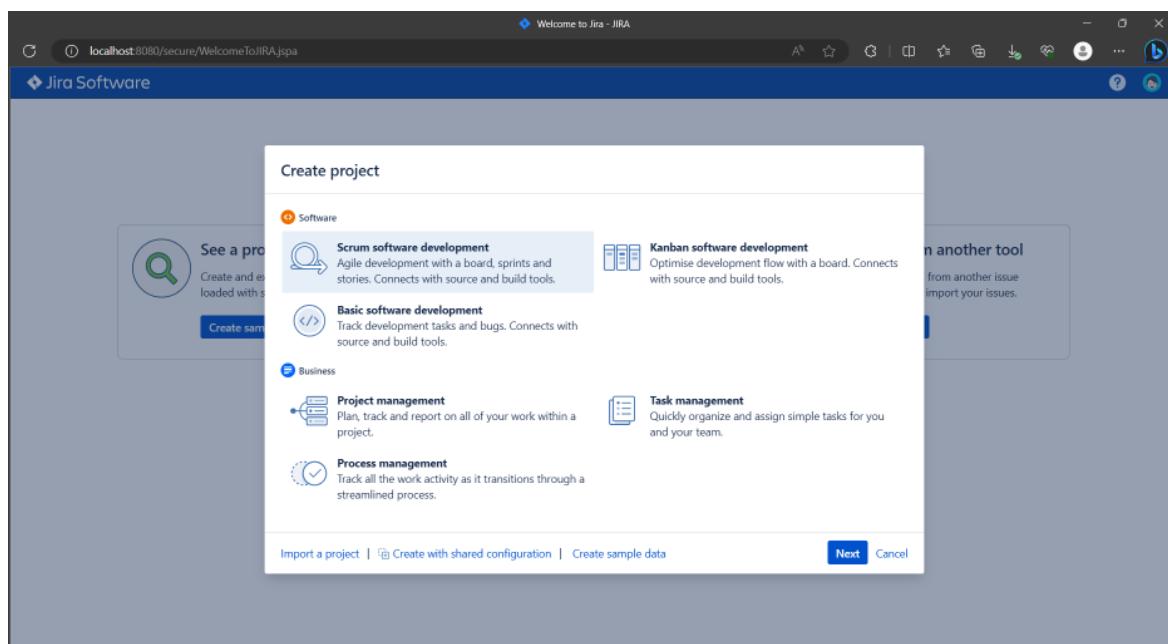
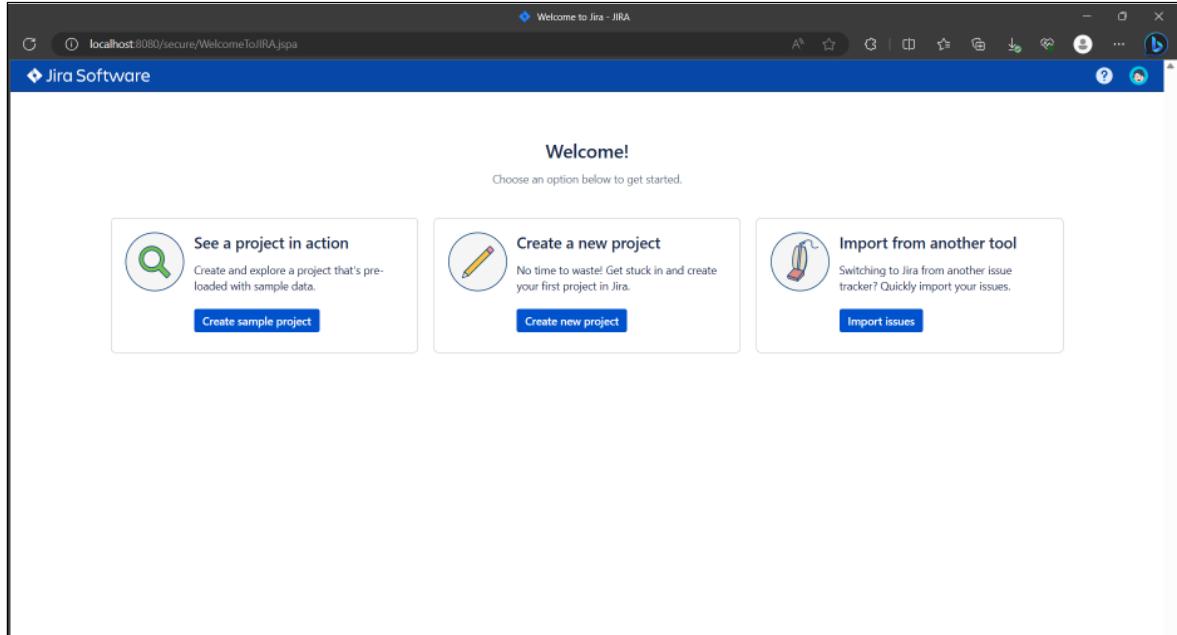


Link for the server is displayed at the bottom of the screen.

Choose the language.

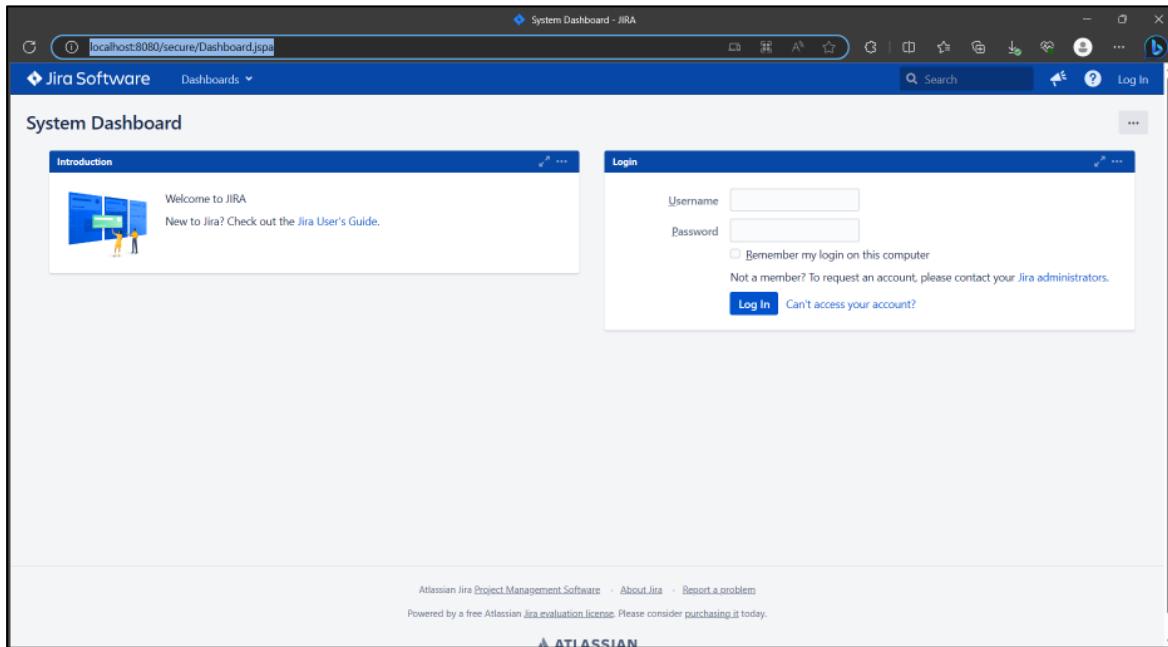


Now you are Ready to Go....!!!



How to Login to Jira?

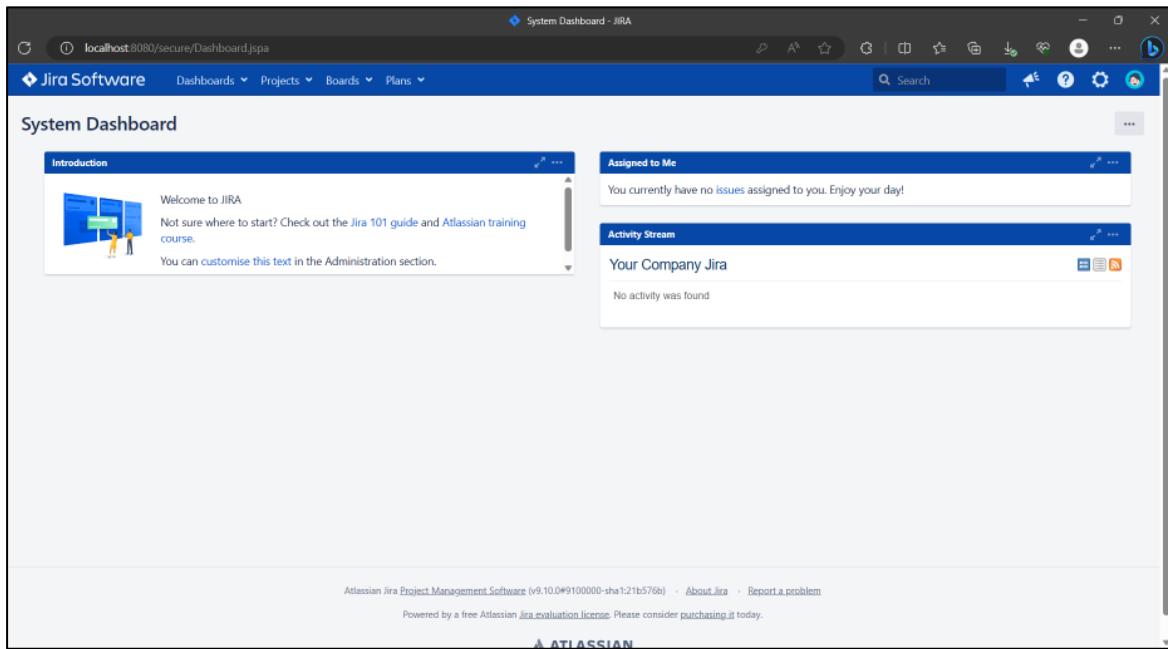
To login to JIRA, go to your sample website. (Like [System Dashboard - JIRA](#)) It will open a login page. Fill in your registered email address/username and Password. Click on the Login button. The following screenshot shows how to login into JIRA using your credentials.



Successful Login

On a successful login, the system dashboard will display if the account is associated with any project by the admin, or if a user can create a sample project as explained in the earlier chapters.

The following screenshot displays the welcome page/dashboard of JIRA on a successful login.



What is on Jira Dashboard?

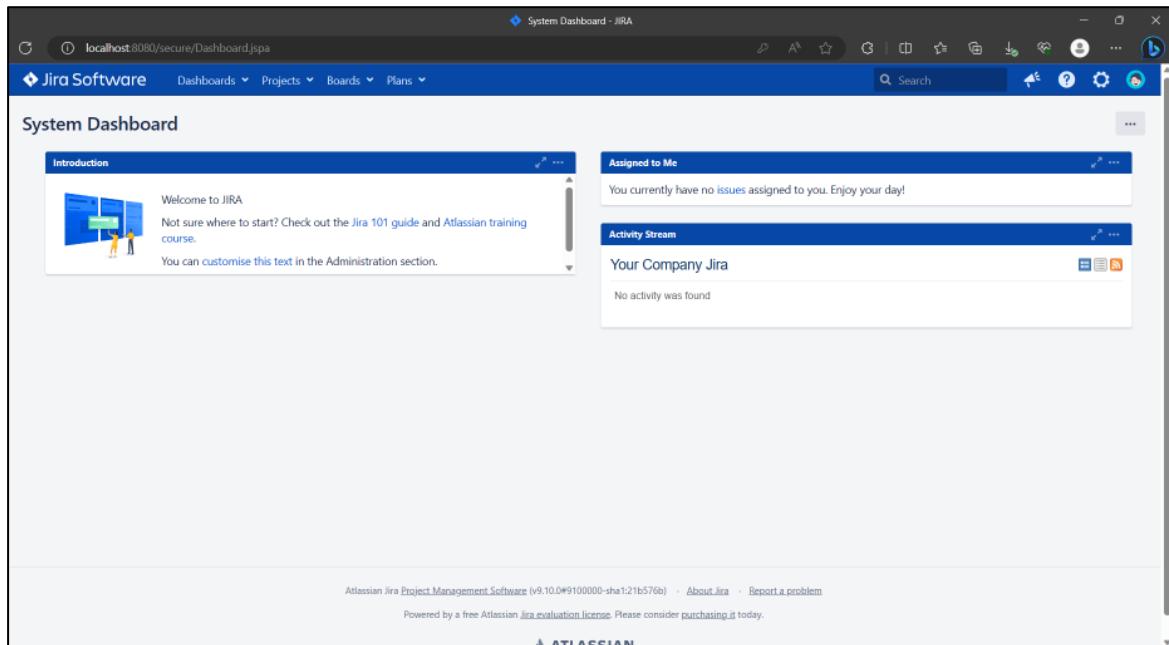
After logging into JIRA, the Dashboard is the first page that shows up. The Dashboard is customized by the Admin. Based on the roles, the admin can set the access of JIRA. Even the admin has the right to change colors and the logo of JIRA.

Important Points of the Dashboard

Following are some of the most significant points the users should understand before using the JIRA Dashboard –

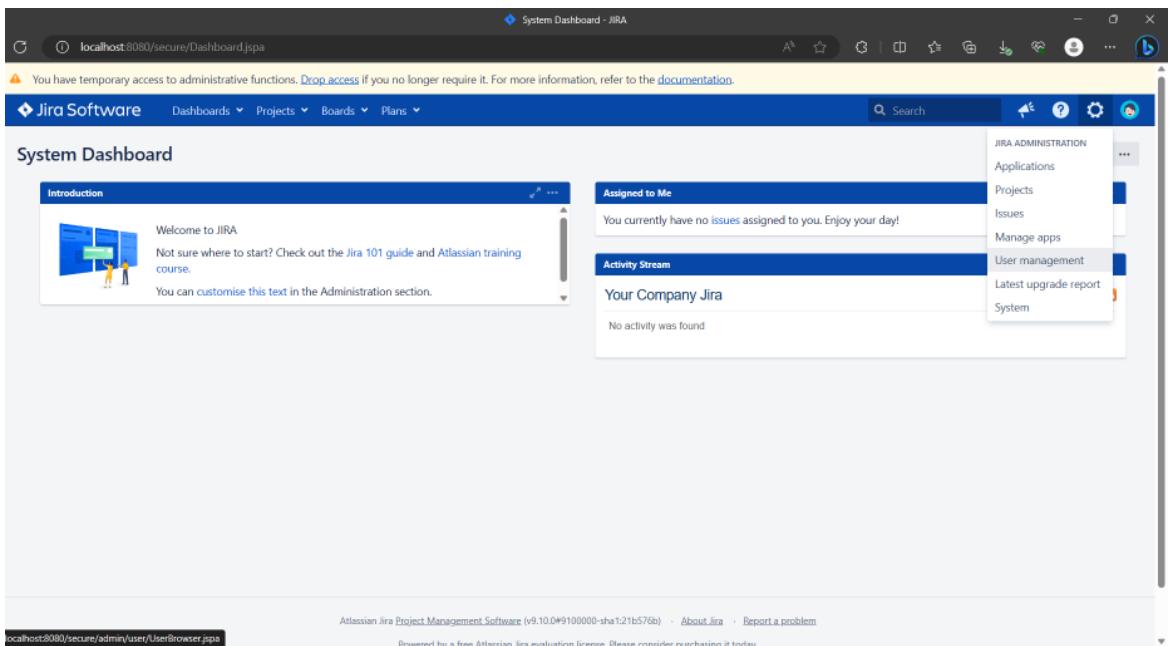
- The navigation bar, present at the top of the JIRA page, will be the same across all the pages/screens of JIRA. Dashboard, Projects, Issues, Boards and Create are the main links. These links have many sub-links to navigate other functionalities.
- Navigation bar contains links that provides a quick access to the most useful functions of JIRA.
- Just under navigation bar, there is a System Dashboard.
- The information provided in the system dashboard area can be customized by the Admin.
- By default, it has three main sections – **Introduction**, **Assigned to Me** (displays Issues list assigned to users) and **Activity Stream** (Activities done by the users).

The following screenshot shows the overview of the Dashboard page of JIRA –



This screenshot shows the Jira Software System Dashboard. The top navigation bar includes links for Jira Software, Dashboards, Projects, Boards, and Plans. The dashboard features three main sections: 'Introduction' (>Welcome to JIRA. Not sure where to start? Check out the [Jira 101 guide](#) and [Atlassian training course](#). You can [customise this text](#) in the Administration section.), 'Assigned to Me' (You currently have no issues assigned to you. Enjoy your day!), and 'Activity Stream' (Your Company Jira. No activity was found). At the bottom, it displays the Atlassian Project Management Software version (v9.10.0#9100000-sha1:21b576b), links to About Jira and Report a problem, and a note about a free evaluation license.

Click on “Administration” icon to access “Administrative Task Menu” to create Global Projects or User Management or Issue Management.



This screenshot shows the same Jira Software System Dashboard as above, but with the 'Administration' icon in the top right corner expanded to reveal the 'Administrative Task Menu'. The menu includes options for Jira Administration (Applications, Projects, Issues, Manage apps, User management, Latest upgrade report, System), a Help icon, and a gear icon for Settings.

Now Let's look at the different Workflow feature & setting which can be setup in JIRA. For all the next section we will be using the Web based JIRA Instance.

What is a Jira Project?

A project is simply a collection of issues (stories, bugs, tasks, etc). You would typically use a project to represent the development work for a product, project, or service in Jira Software.

A Project contains issues; a JIRA project can be called as a collection of issues. A JIRA Project can be of several types. For example –

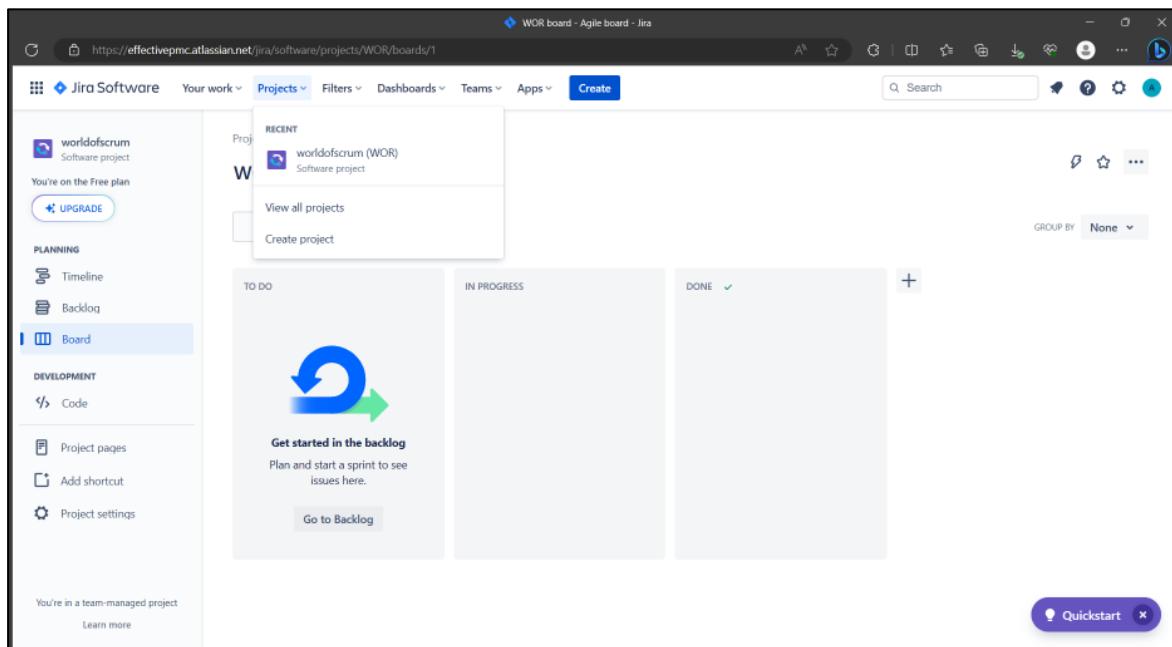
- Software Development Project
- Marketing Project
- Migration to another platform project
- Help Desk Tracking Project
- Leave Request Management System
- Employee Performance System
- Website Enhancement

Types of Projects

The Projects link has several sub-links, which are explained in detail for better understanding –

- **Recent Project** – It displays the name of the recent project that the user has accessed, if exists, where the user can navigate by clicking on the project listed under this header.
- **Software** – It is the sub-link to navigate the list of projects, which are listed in the Project Type as Software.
- **Business** – It is also a project-type. By clicking here, it will display the list of business project types.
- **View all Projects** – It displays all the projects, which are associated with the logged in user.
- **Create Project** – This link is usually accessed by the Admin or it depends on various roles. If this link is visible, a user can create a new project by following the instructions given there.

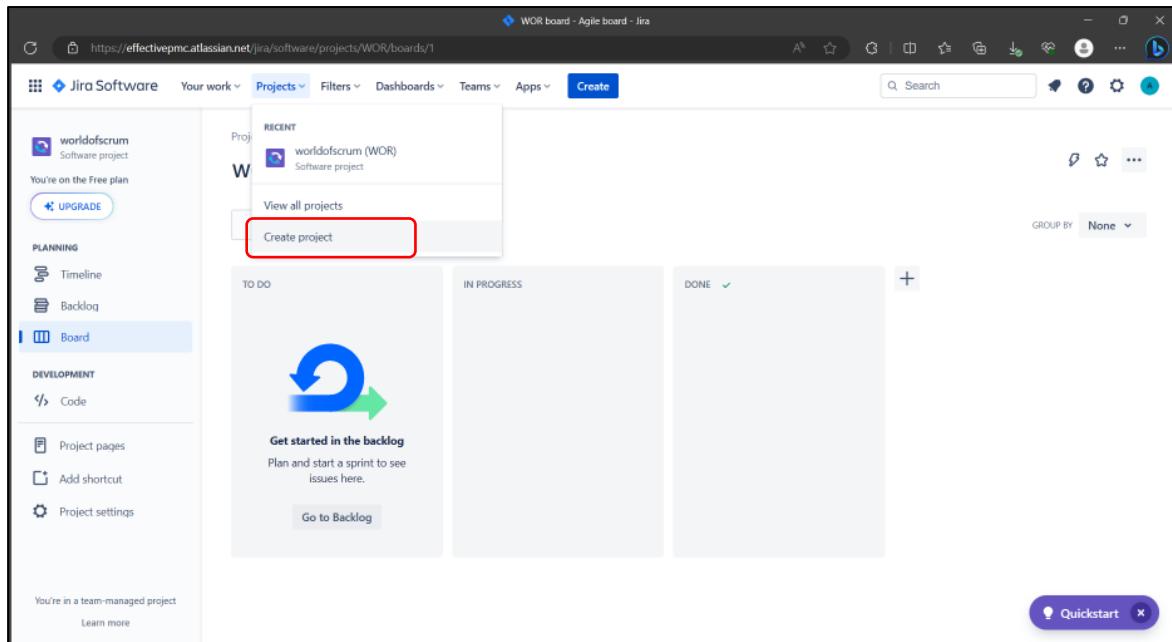
The following screenshot shows the different sub-links under the Project category.



Create a New Project

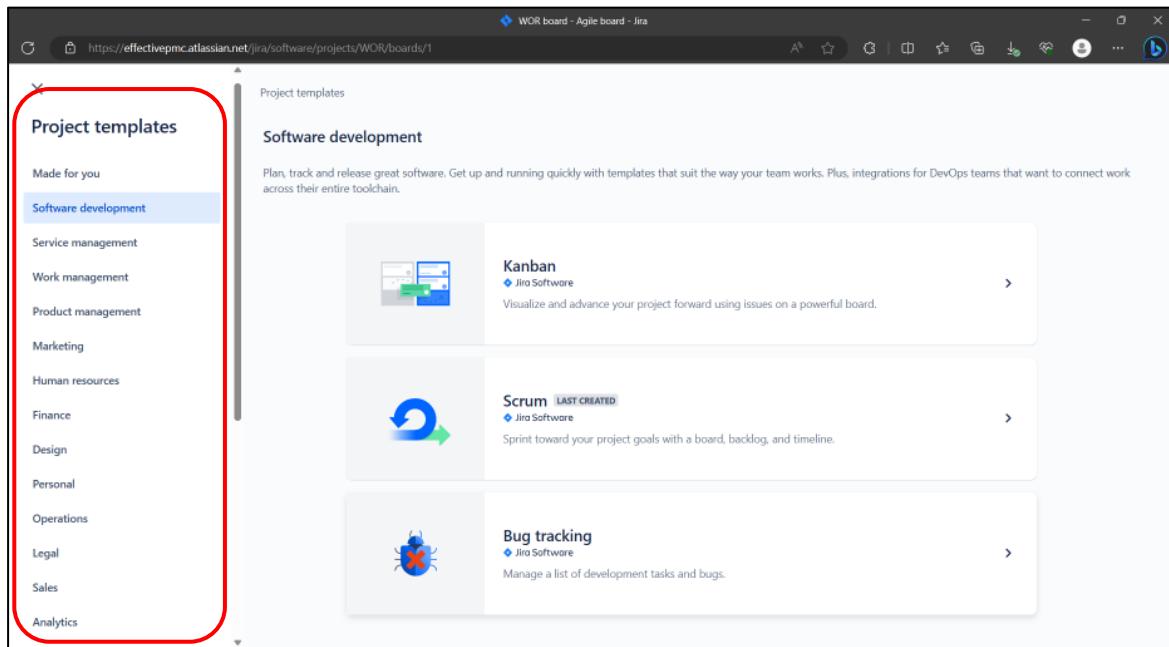
To create a project, the user should login as a JIRA Admin and then Click on Project → Create Project.

The following screenshot shows how to reach to the **Create Project** button from the Dashboard.



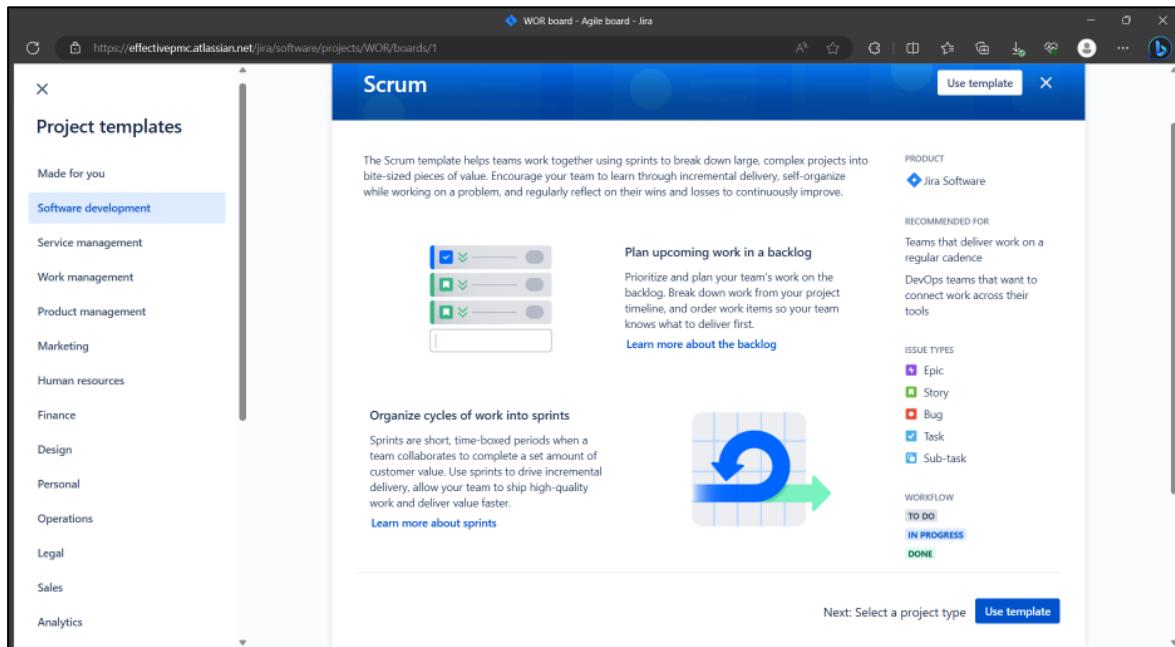
Choose the type of Project that suits your requirement and the process it should follow.

The following screenshot displays the type of projects available in JIRA.



Once the type of project is selected, click on Next. The user will see the flow of the project based on the selection. Here, we have selected **Software development**.

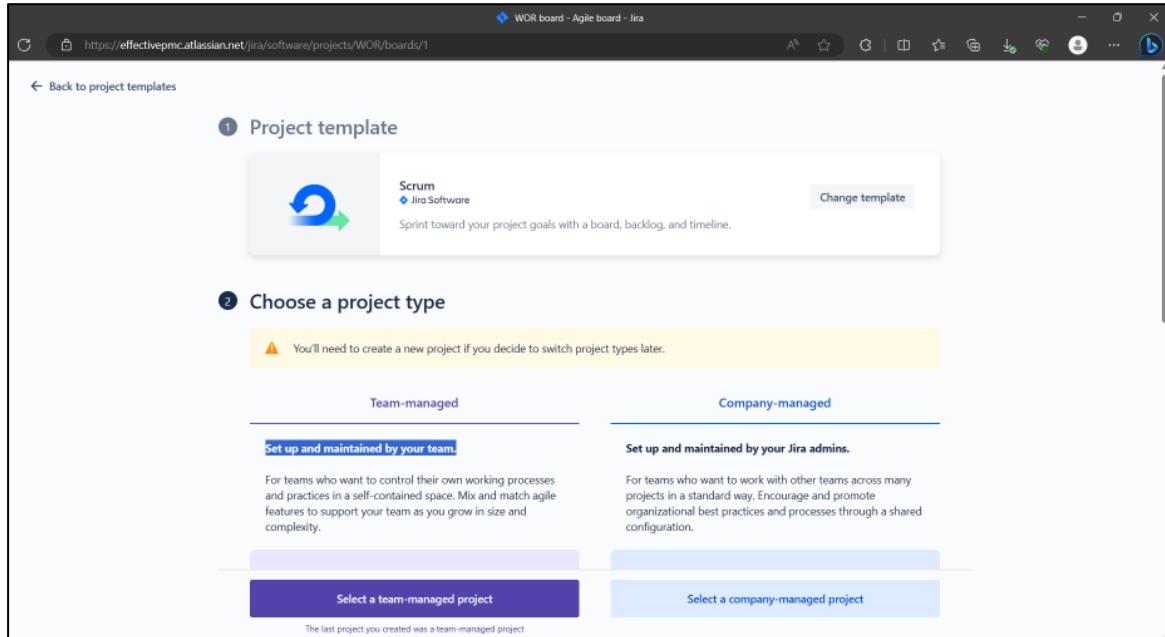
The following screenshot displays the available issue types and the workflow for the chosen project in the step mentioned above –



The screenshot shows the Jira Software interface for selecting a project template. On the left, a sidebar lists 'Project templates' categorized by industry: Made for you, Software development, Service management, Work management, Product management, Marketing, Human resources, Finance, Design, Personal, Operations, Legal, Sales, and Analytics. 'Software development' is selected. The main content area is titled 'Scrum' and describes the template's purpose: helping teams work together using sprints to break down large, complex projects into bite-sized pieces of value. It includes sections on 'Plan upcoming work in a backlog', 'Organize cycles of work into sprints', and 'Learn more about the backlog' and 'Learn more about sprints'. To the right, there are sections for 'PRODUCT' (Jira Software), 'RECOMMENDED FOR' (Teams that deliver work on a regular cadence, DevOps teams), 'ISSUE TYPES' (Epic, Story, Bug, Task, Sub-task), and 'WORKFLOW' (TO DO, IN PROGRESS, DONE). A 'Use template' button is located at the top right of the main content area.

Click on the “Use Template” button.

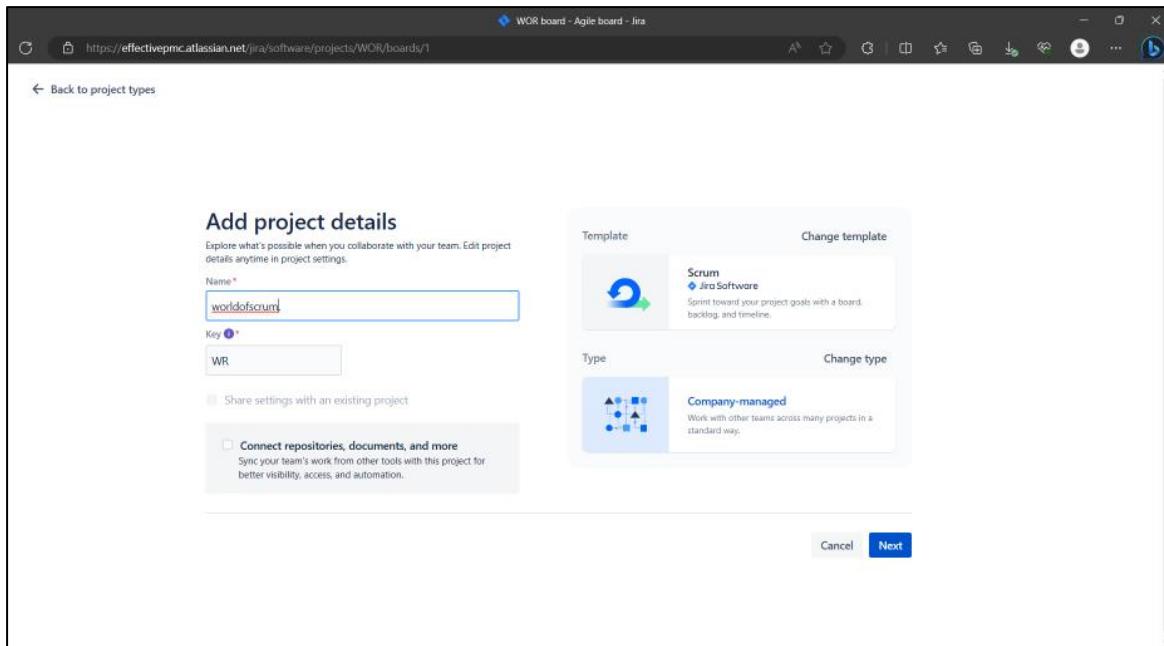
Now on the next screen you will be asked to choose the project Type. Either **Team-managed** or **Company-managed** (Refer Server-side Setup for detail)



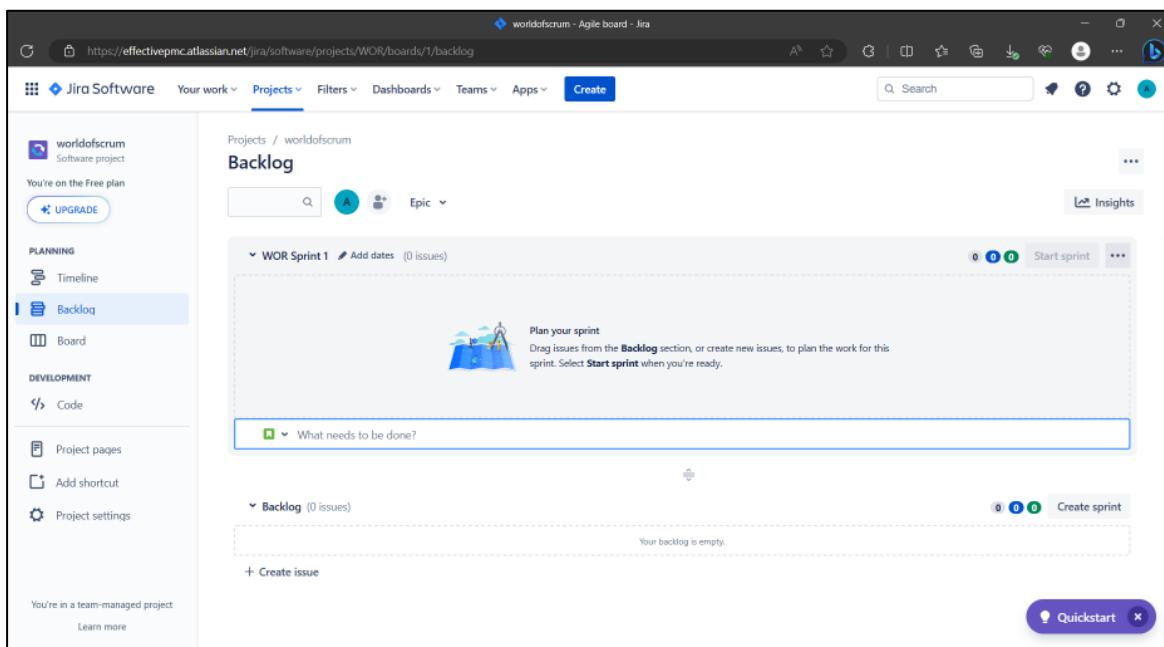
The screenshot shows the Jira Software interface for choosing a project type. At the top, it says 'Project template' and shows the 'Scrum' template selected. Below that, a note says 'Sprint toward your project goals with a board, backlog, and timeline.' A 'Change template' button is available. The main section is titled 'Choose a project type' and contains two options: 'Team-managed' and 'Company-managed'. A warning message states: '⚠ You'll need to create a new project if you decide to switch project types later.' Under 'Team-managed', there is a sub-section 'Set up and maintained by your team.' which describes it as for teams who want to control their own working processes and practices in a self-contained space. A 'Select a team-managed project' button is present. Under 'Company-managed', there is a sub-section 'Set up and maintained by your Jira admins.' which describes it as for teams who want to work with other teams across many projects in a standard way. A 'Select a company-managed project' button is present. A note at the bottom says 'The last project you created was a team-managed project.'

Now “Add Project Details”

- Enter Project Name



The following screenshot displays dashboard presented after creation of a project.



What are issues in Jira?

JIRA uses issues to track all the tasks. An issue helps to track all works that underlie in a project. In real time, every work or task either technical, non-technical, support or any other type of a project in JIRA are logged as an issue.

An issue can be dependent on the organization and requirements –

- Story of a project
- Task of a story
- Sub-task of a story
- A defect or bug can be an issue
- Helpdesk Ticket can be logged as issue
- Leave Request

In JIRA, workflow is used to **track the lifecycle of an Issue**. Workflow is a record of statuses and transitions of an issue during its lifecycle. A status represents the stage of an issue at a particular point. An issue can be in only one status at a given point of time like Opened, To Do, Done, Closed, Assigned, etc.

Example

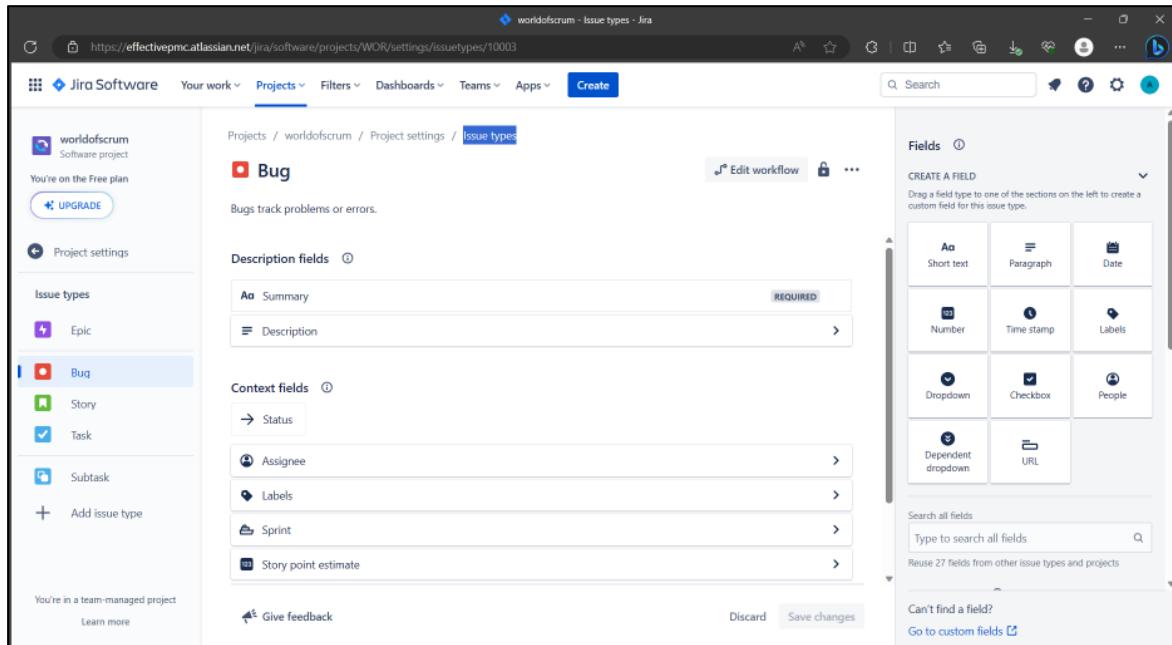
As of now, an issue is created and opened. When the assignee starts working on the issue, the issue moves to the **In Progress status**. Here, the transition is starting the work, while the status of the issue is now progressive.

JIRA workflow has the following stages to track as soon as an issue is created –

- **Open Issue** – After creation, the issue is open and can be assigned to the assignee to start working on it.
- **In Progress Issue** – The assignee has actively started to work on the issue.
- **Resolved Issue** – All sub-tasks and works of that Issue are completed. Now, the issue is waiting to be verified by the reporter. If verification is successful, it will be closed or re-opened, if any further changes are required.
- **Reopened Issue** – This issue was resolved previously, but the resolution was either incorrect or missed a few things or some modifications are required. From Reopened stage, issues are marked either as assigned or resolved.
- **Close Issue** – The issue is considered as finished, resolution is correct as of now. Closed issues can be re-opened later based on the requirement.

Types of Issues

It has many sub links to access other functionalities. The following screenshot shows different available issue types. To see the issue types available for your project navigate to “Project-> Project settings -> Issue types”



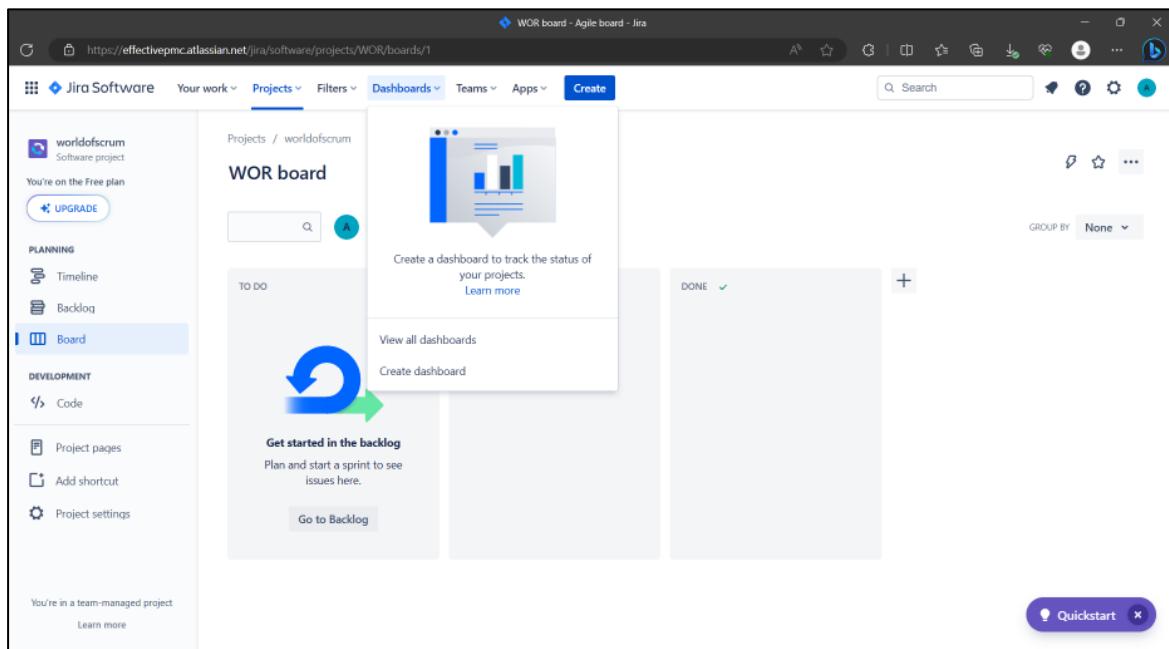
The screenshot shows the Jira Software interface for managing issue types. On the left, there's a sidebar with 'Issue types' listed, including 'Epic', 'Bug' (which is selected and highlighted in blue), 'Story', 'Task', 'Subtask', and '+ Add issue type'. The main content area is titled 'Bug' and describes it as 'Bugs track problems or errors.' It shows 'Description fields' like 'Summary' (REQUIRED) and 'Description'. Under 'Context fields', there are dropdowns for 'Status', 'Assignee', 'Labels', 'Sprint', and 'Story point estimate'. On the right, a panel titled 'Fields' lists various field types: Short text, Paragraph, Date, Number, Time stamp, Labels, Dropdown, Checkbox, People, Dependent dropdown, and URL. A search bar at the bottom right allows for finding specific fields.

Types of Boards

Boards are showcase of process that is followed by Project. It could be the most famous Agile Board if the project is following the agile methodology or it might be the Kanban board as well.

- **Recent Board** – It displays the recent project board accessed by the user.
- **View all boards** – It displays all available project boards.

The following screenshot shows the different sub-links available under the board section.



What are issue types in Jira?

Since JIRA tracks all the tasks, the sub-tasks or even a work as an Issue, there are several types of Issues to identify the work and categorize the similar issues.

An Issue is classified as follows –

- **Epic** – A big user story that needs to be broken down. Created by JIRA Software - do not edit or delete.
- **Bug** – A problem that impairs or prevents the functions of the product.
- **Improvement** – An improvement or enhancement to an existing feature or task.
- **New Feature** – A new feature of the product, which is yet to be developed.
- **Story** – A user story. Created by JIRA Software - do not edit or delete.
- **Task** – A task that needs to be done to achieve team's goal.
- **Sub-Task** – This is the sub-task of an issue. In a logged issue, there can be different tasks to resolve it, which are called as sub-tasks.

JIRA – Scrum Workflow

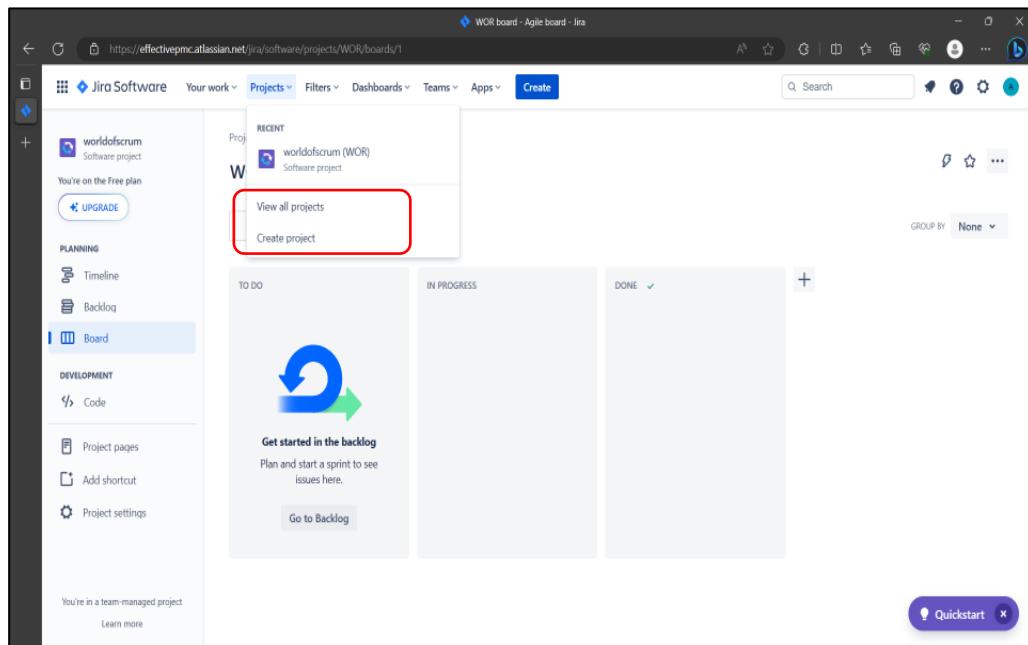
Scrum is an agile approach, commonly used by developers to deliver the value in the shortest time. It makes it possible to work upon projects iteratively. Each iteration is called Sprint.

How to Use Jira for Scrum?

In Scrum, the team builds the product in a series of iterative sprints. To get started, you'll want to create a Jira Scrum project. Jira makes it easy to track and schedule tasks and to monitor progress. To get started, you'll need to create a Jira Scrum project at first.

Create a Jira Scrum Project

1. Navigate to Projects > Create project.



2. Choose Project template (whatever suits you best).
3. Choose a project type - Team-managed or Company-managed
4. Add project details - Enter a name for the project.
5. Click the Create button.

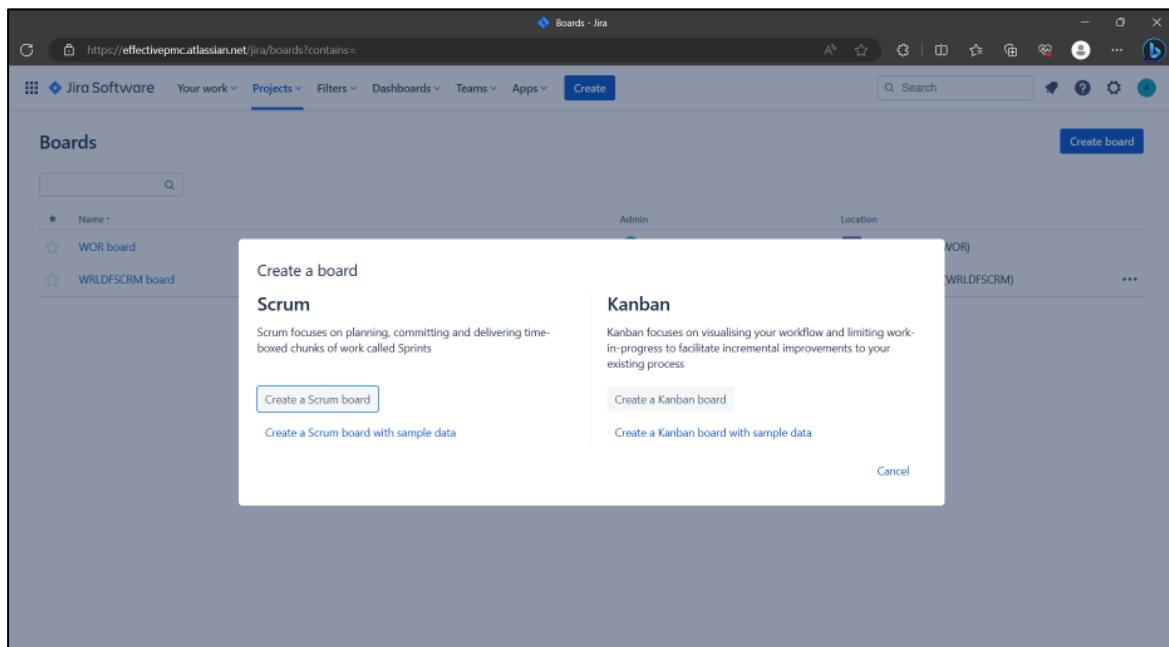
Create a Jira Scrum Board

To create a board from scratch, select **Search > Goto all boards**.

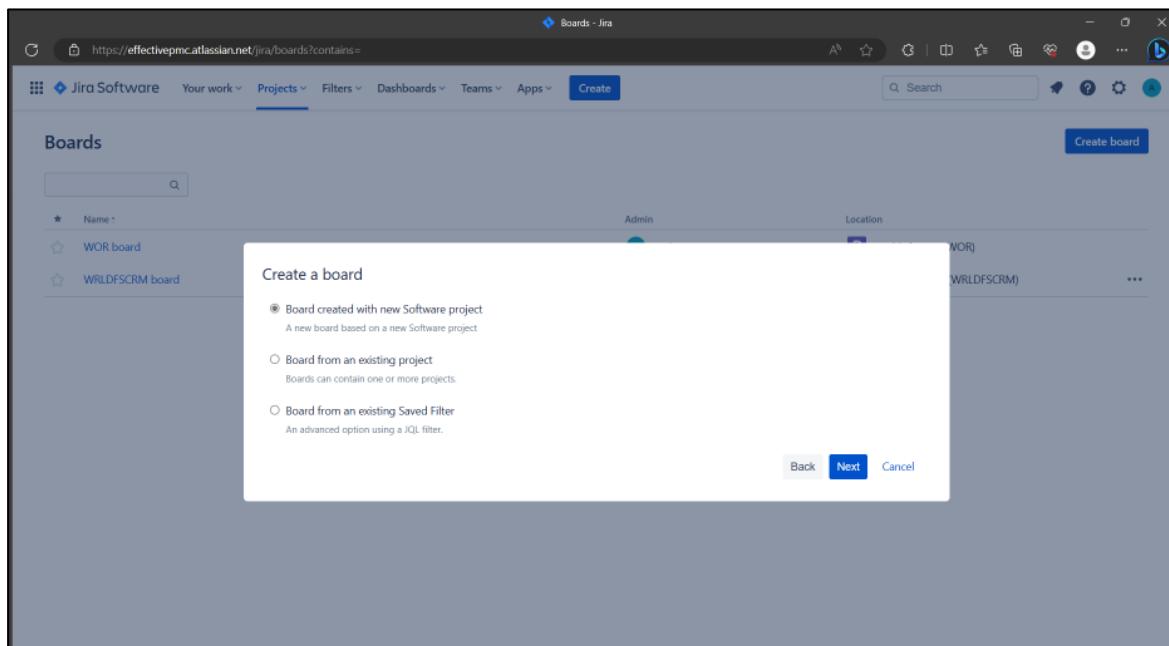
Then click **Create board**.

Name	Admin	Location
WOR board	Archana	worldofscrum (WOR)
WRDFSCRM board	Archana	worldofscrum- (WRDFSCRM)

Select **Scrum** among the proposed board types.



The screenshot shows the Jira Boards creation dialog. It has two main sections: 'Scrum' and 'Kanban'. The 'Scrum' section contains a brief description: 'Scrum focuses on planning, committing and delivering time-boxed chunks of work called Sprints', a 'Create a Scrum board' button, and a link to 'Create a Scrum board with sample data'. The 'Kanban' section contains a brief description: 'Kanban focuses on visualising your workflow and limiting work-in-progress to facilitate incremental improvements to your existing process', a 'Create a Kanban board' button, and a link to 'Create a Kanban board with sample data'. A 'Cancel' button is at the bottom right of the dialog.



The screenshot shows the Jira Boards creation dialog. It displays three options for creating a board: 'Board created with new Software project' (selected), 'Board from an existing project', and 'Board from an existing Saved Filter'. Each option has a brief description below it. At the bottom of the dialog are 'Back', 'Next', and 'Cancel' buttons.

Select “Board from an existing project” -> “Next”

On next screen “Name the board”, Select the project and location. Click “Create Board”

Create EPICs, User Stories, Tasks, and Bugs in Jira Scrum Backlog for the project.

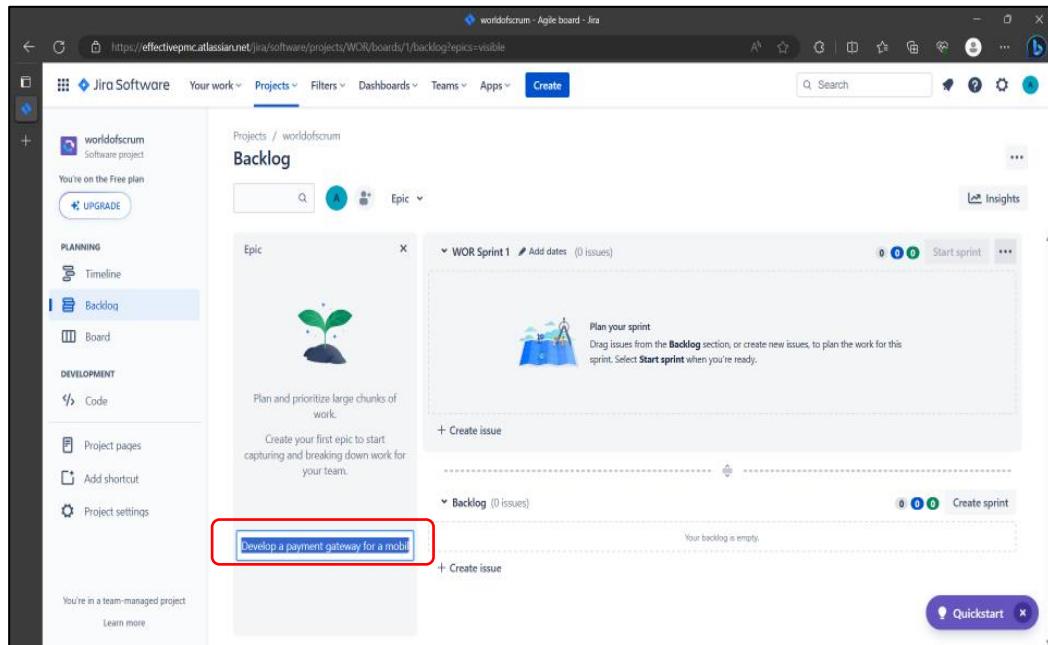
In Scrum, user stories define the requirements in user Language. They help developers to understand who needs a product? what benefits they need? Etc. JIRA defines User Stories, Tasks, and Bugs in form of “Issues” Let’s look at how to create issues or EPICS

Create an EPIC

High level user stories are called EPICs. They can be subdivided into stories and subtask.

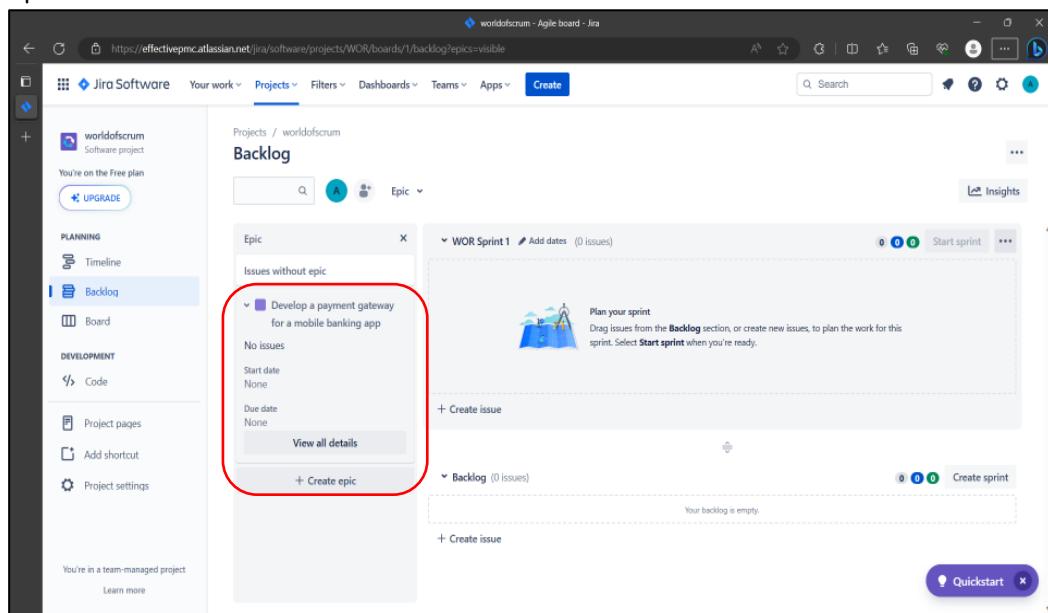
1. Open EPIC's panel

2. Click on Create epic and describe your epic details



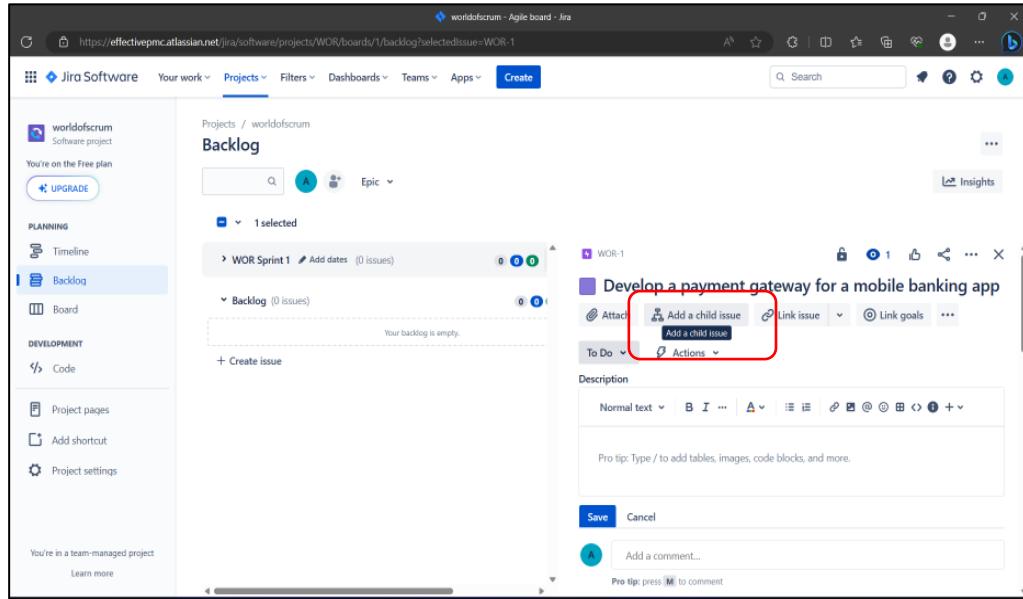
The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar is open, showing 'Backlog' is selected. The main area is titled 'Backlog' and contains an 'Epic' section. A card for an epic titled 'Develop a payment gateway for a mobile banking app' is visible, with a red box highlighting it. Below the epic card, there is a note: 'Plan and prioritize large chunks of work. Create your first epic to start capturing and breaking down work for your team.' To the right of the epic card is a sprint section for 'WOR Sprint 1'. At the bottom of the epic section, there is a button labeled '+ Create epic'.

3. Epic will be created as seen in follow screen shot.



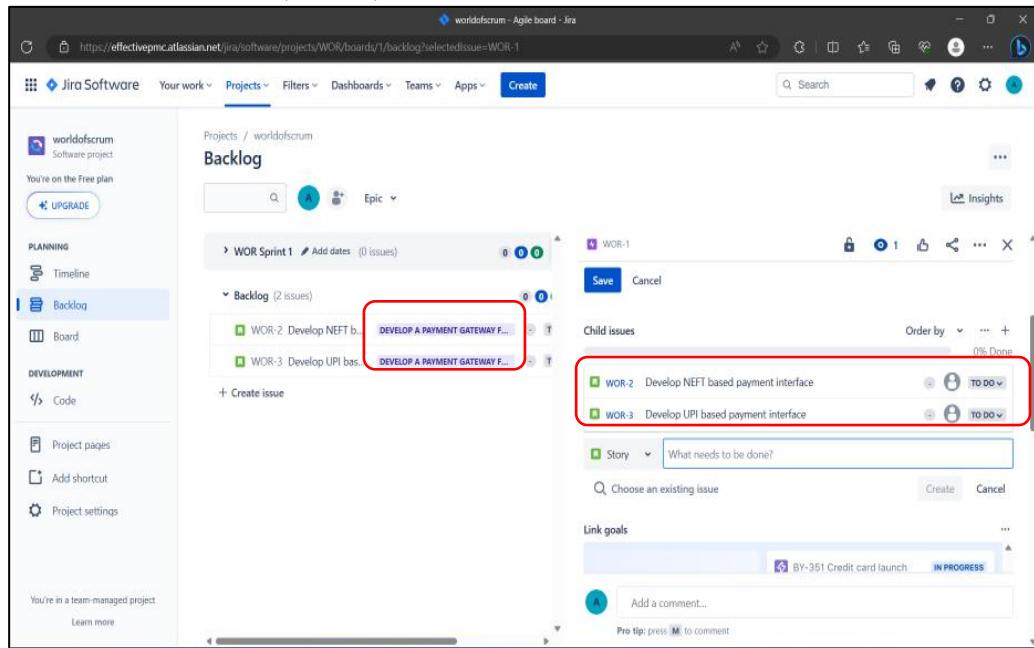
The screenshot shows the same Jira Software interface as the previous one, but now the epic has been successfully created. The 'Issues without epic' section is highlighted with a red box, showing the newly created epic card. The card's title is 'Develop a payment gateway for a mobile banking app'. The rest of the interface remains the same, including the 'WOR Sprint 1' section and the '+ Create epic' button at the bottom.

4. No add details of user stories as “Issues” under EPIC.



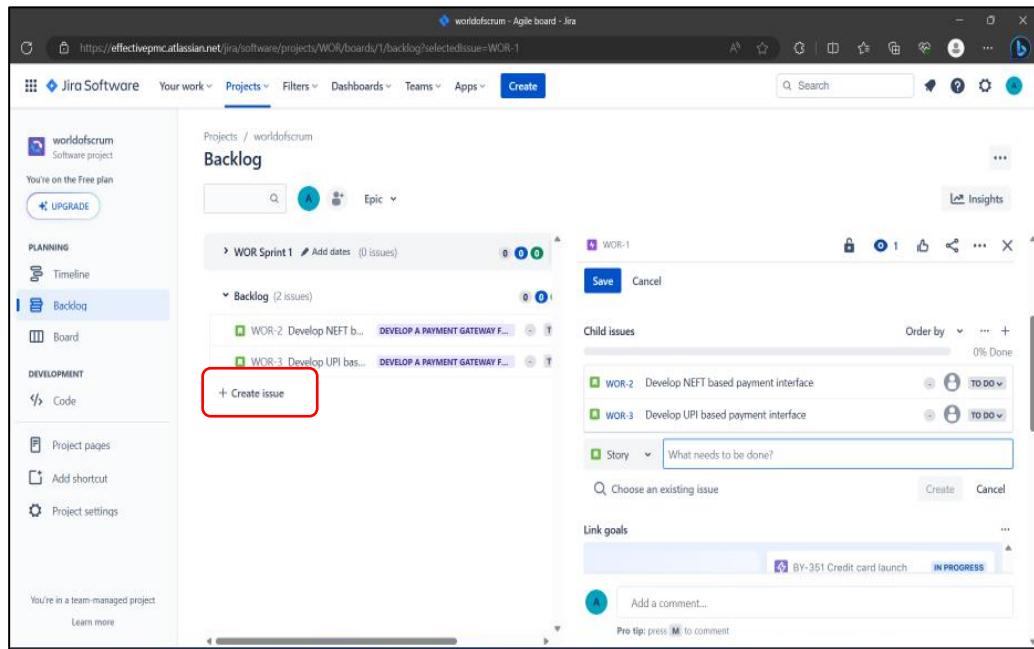
The screenshot shows the Jira Software interface for the 'worldofscrum' project. On the left, the sidebar has 'Backlog' selected under 'PLANNING'. The main area shows a backlog for 'WOR Sprint 1' with 0 issues. An epic titled 'WOR-1' is expanded, showing a child issue: 'Develop a payment gateway for a mobile banking app'. A red box highlights the 'Add a child issue' button in the epic's action menu.

5. Enter Stories details (Issues)

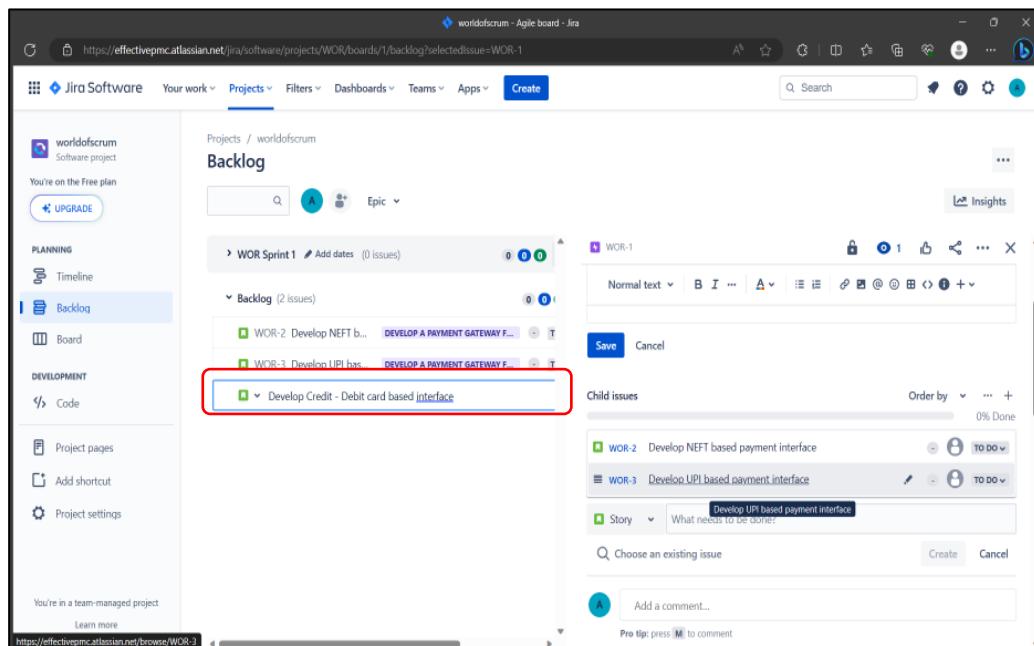


The screenshot shows the Jira Software interface for the 'worldofscrum' project. The 'Backlog' section now displays two issues: 'WOR-2: Develop NEFT based payment interface' and 'WOR-3: Develop UPI based payment interface'. A red box highlights the 'Child issues' section where these stories are listed. Another red box highlights the story details for 'wOR-2' and 'wOR-3', which both show a status of 'TO DO'.

6. If epics are not needed you can create the User story directly using “Create Issue” option



The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar has sections for PLANNING (Timeline, Backlog), DEVELOPMENT (Code), and other project management tools. The main area displays the 'Backlog' with two issues: 'WOR-2: Develop NEFT based payment interface' and 'WOR-3: Develop UPI based payment interface'. A red box highlights the '+ Create issue' button at the bottom of the backlog list.



This screenshot shows the same Jira interface after a new issue has been created. The backlog now includes three items: 'WOR-2: Develop NEFT based payment interface', 'WOR-3: Develop UPI based payment interface', and a new item 'Develop Credit - Debit card based interface'. A red box highlights this newly added issue in the backlog list.

Create an issue

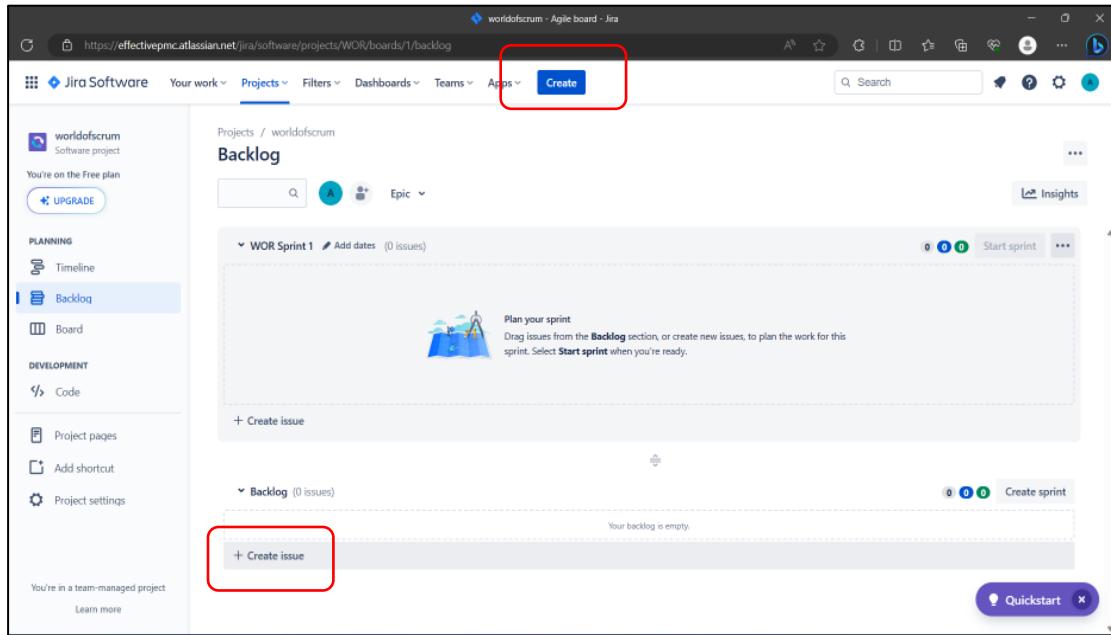
To create an issue in JIRA, the user should have Create Issue permission in the project. Admin can add/remove the permission.

There are a few different ways to create issues:

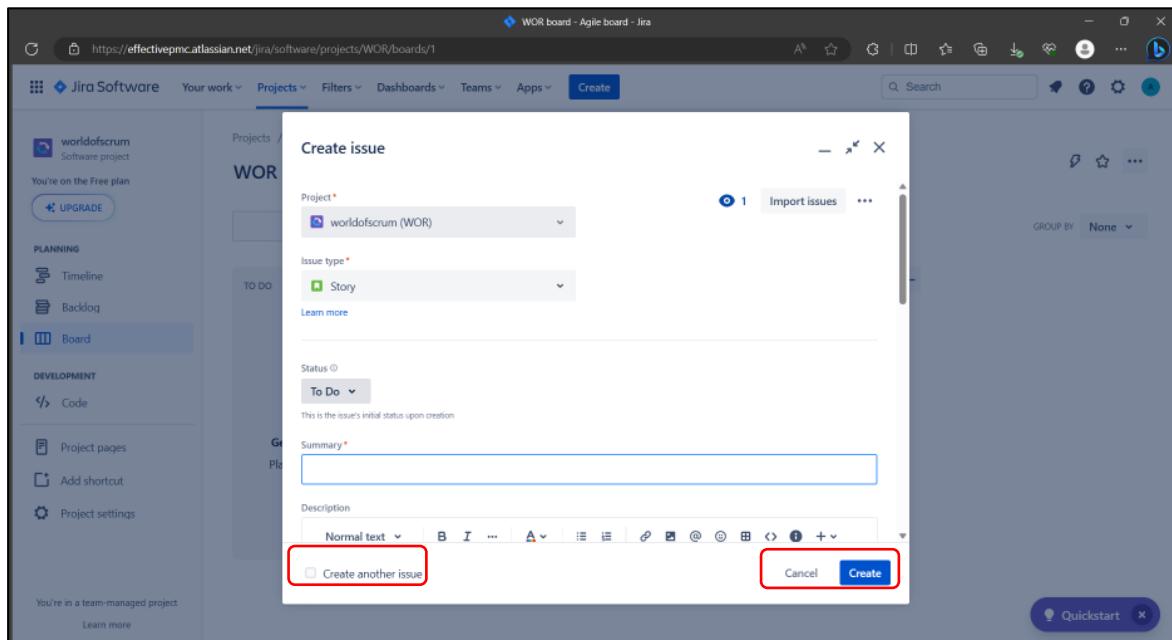
“Create” - From the top navigation bar, anywhere in Jira

Or

“Create issue” – From On the backlog



The following screenshot shows how to create an issue by providing the required and optional details.



If the “Create another” checkbox is not checked, after clicking on the Create button, the user will have to navigate to the Dashboard and a pop-up will display on the right side with an **issue id** and **summary**.

JIRA - Edit an Issue

To edit an issue in JIRA, the user has to navigate to the issue, which is required to edit and click on the issue to open the page. It will open the edit issue page that is similar to the create page.

Create sub-tasks (Optional)

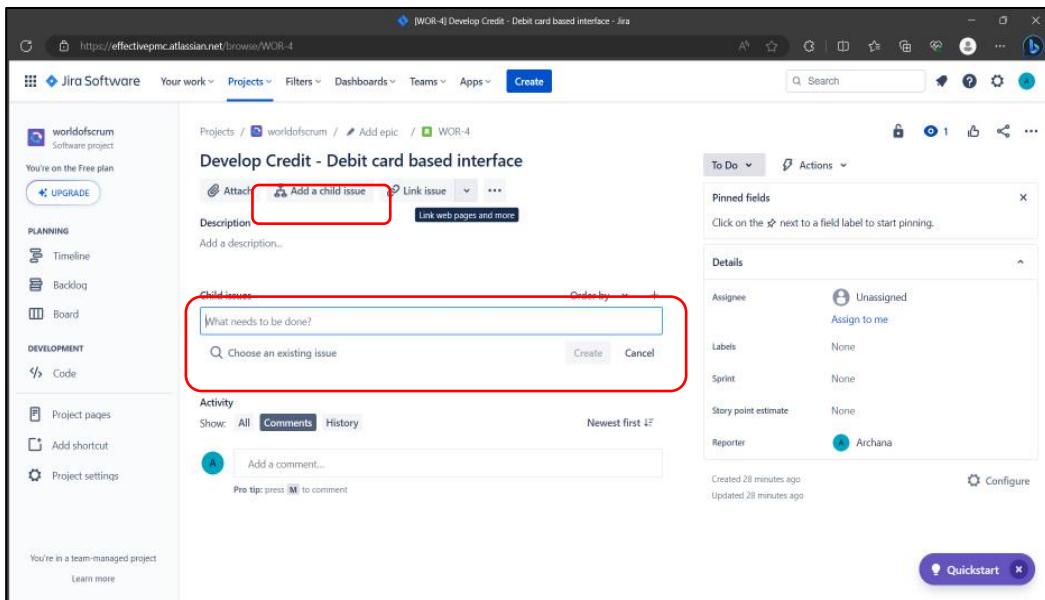
Issues can also have sub-tasks that are assigned and tracked individually. You might create sub-tasks for any of the following reasons:

- To split an issue into even smaller chunks
- To allow various aspects of an issue to be assigned to different people
- To create a to-do list for an issue

Please note that Subtasks cannot have a subtask of their own.

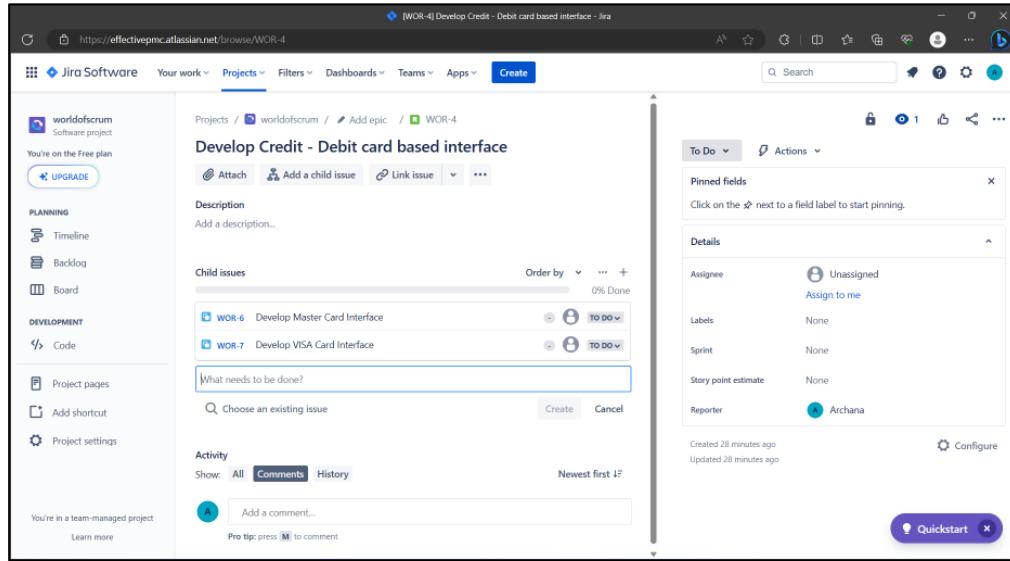
To create a sub-task:

1. Navigate to an issue, and select Add a child issue.



The screenshot shows the JIRA interface for editing an issue titled 'WOR-4 Develop Credit - Debit card based interface'. On the left, there's a sidebar with project navigation. The main area shows the issue details. A red box highlights the 'Add a child issue' button in the top right of the main panel. Another red box highlights the 'Description' field and the 'Child issues' section below it, which contains a text input field and a dropdown menu for selecting an existing issue.

2. Fill in the details as needed. Click **Create** to create the subtask



Convert Issue to Subtask & Subtask to Issue

In this Section, we will understand how to convert an issue to a subtask. For doing this, we should follow the procedure given below.

JIRA - Convert an Issue to a Subtask

We should consider the following points while converting an issue to a subtask.

- An issue cannot be converted into a subtask if it has its own subtask.
- To convert such an issue into a subtask, we should first convert all the subtasks of issues into a standard issue and after that convert the issue into a subtask.
- Subtasks cannot be moved from one issue to another directly.
- To move a subtask from one issue to another, first convert all sub-tasks into issues and then again, convert issues to subtasks by giving the parent issue name while converting.

Let's learn how to convert a subtask to an issue.

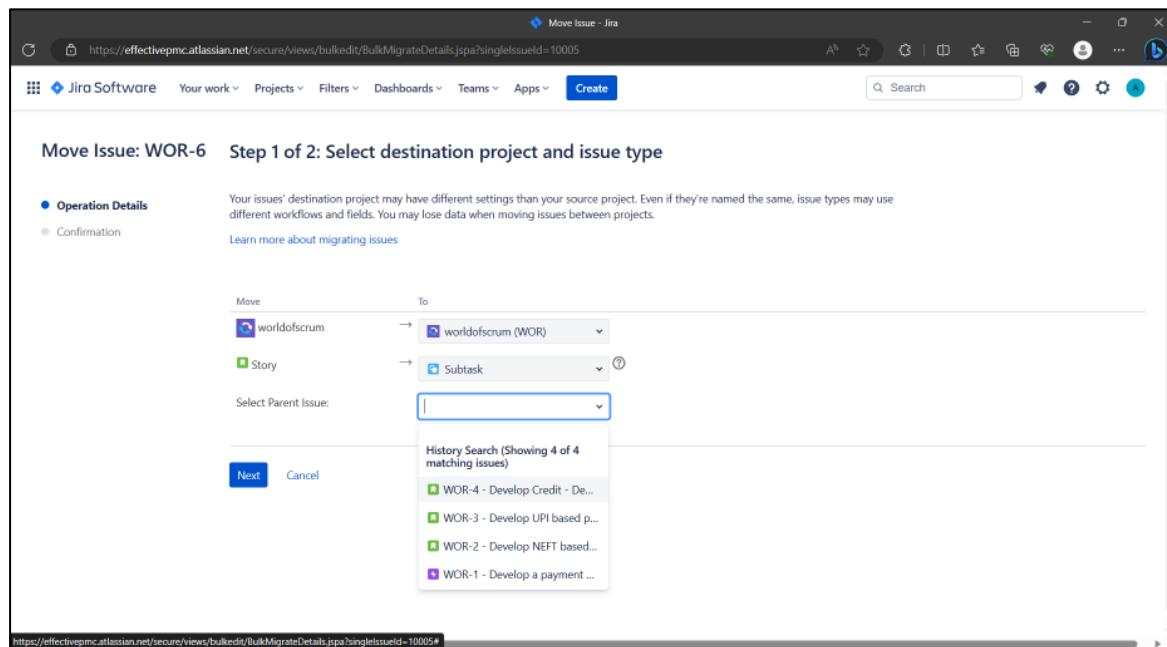
To convert an issue to subtask, we should first navigate to the issue that needs to be converted into a subtask. Then, Select More → Move.

The screenshot shows a Jira Software interface for issue WOR-6. The main panel displays the issue details: 'Develop Master Card Interface' under 'Activity' and 'Comments' selected. The right side shows the 'Actions' dropdown menu, which includes options like 'Add flag', 'Connect Slack channel', 'Change parent', 'Move', 'Clone', 'Delete', 'Print', 'Export XML', 'Export Word', 'Take a tour', and 'Configure'. The 'Move' option is circled in red.

On Select destination project and issue type screen – Change the “Story” dropdown to “Subtask”.

The screenshot shows the 'Move Issue' wizard, Step 1 of 2: Select destination project and issue type. It shows the 'Move' section where 'worldofscrum' is selected and mapped to 'worldofscrum (WOR)'. Below it, the 'Story' section has a dropdown menu open, showing 'Story' and 'Subtask'. 'Subtask' is selected and highlighted. At the bottom are 'Next' and 'Cancel' buttons.

“Select Parent Issue” - option will be displayed. Select appropriate parent for the issue and Click “Next”



Move Issue: WOR-6 Step 1 of 2: Select destination project and issue type

Operation Details

Your issues' destination project may have different settings than your source project. Even if they're named the same, issue types may use different workflows and fields. You may lose data when moving issues between projects.

Learn more about migrating issues

Move To
 worldofscrum → worldofscrum (WOR)
 Story → Subtask

Select Parent Issue:

History Search (Showing 4 of 4 matching issues)

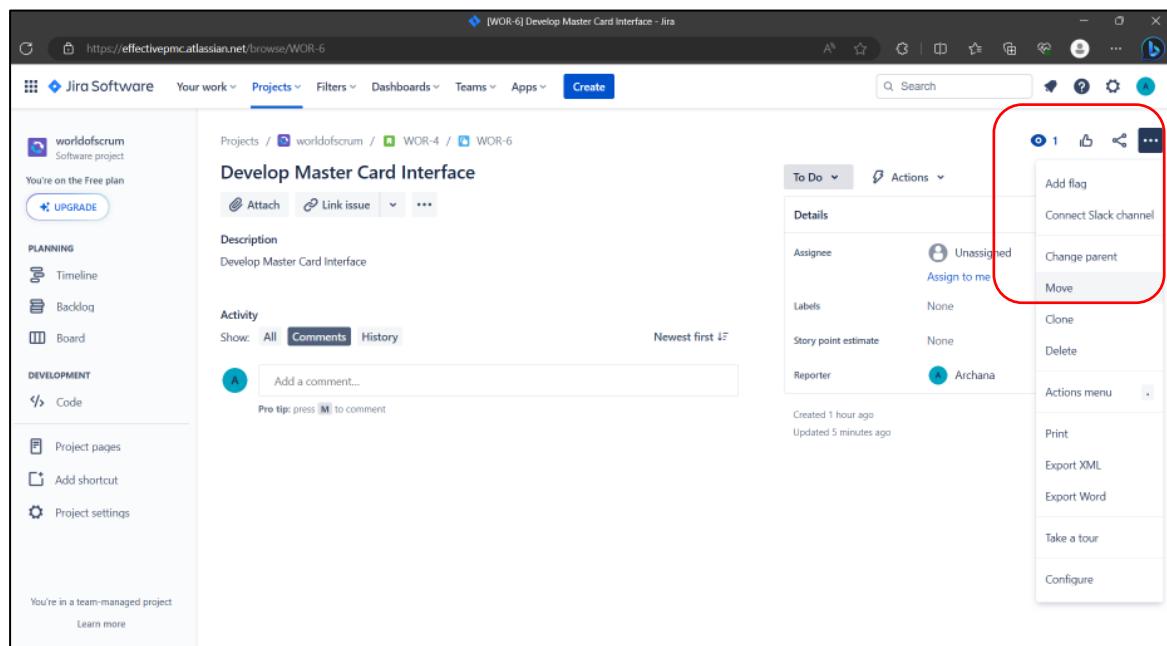
- WOR-4 - Develop Credit - De...
- WOR-3 - Develop UPI based p...
- WOR-2 - Develop NEFT based...
- WOR-1 - Develop a payment ...

Next Cancel

Confirmation message “Update fields for 'SubTask' issues in the 'Your' project” will be shown. Click “Next” & “Confirm”

JIRA - Convert a Subtask to an Issue

To convert a subtask to an issue, we should first navigate to the subtask that needs to be converted into an issue. Then, Select More → Move.



[WOR-6] Develop Master Card Interface - Jira

Projects / worldofscrum / WOR-4 / WOR-6

Develop Master Card Interface

Description: Develop Master Card Interface

Activity: Show: All Comments History Newest first 47

Add a comment... Pro tip: press M to comment

To Do Actions

Details

Assignee: Unassigned Assign to me

Labels: None

Story point estimate: None

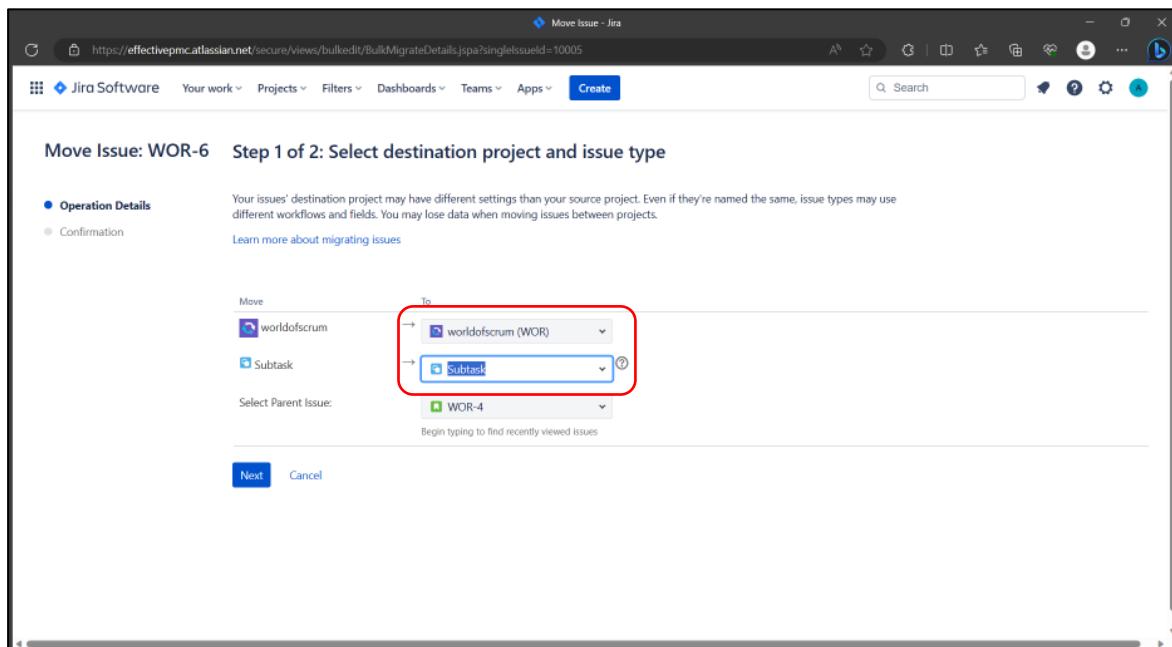
Reporter: Archana

Created 1 hour ago Updated 5 minutes ago

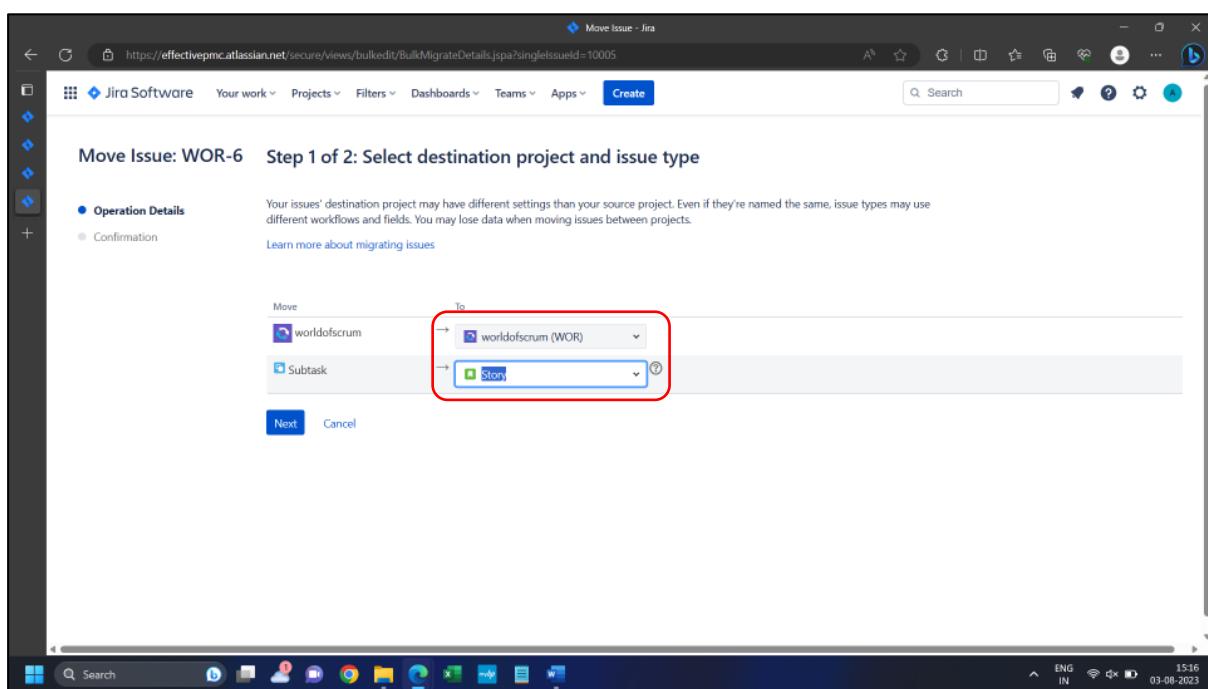
Actions menu

- Add flag
- Connect Slack channel
- Change parent
- Assign to me
- Move
- Clone
- Delete
- Actions menu
- Print
- Export XML
- Export Word
- Take a tour
- Configure

On Select destination project and issue type screen -



Change the dropdown for “Subtask” to “Story” and click “Next”



Confirmation message “Update fields for 'Story' issues in the 'Your' project” will be shown. Click “Next” & “Confirm”

Using Sprints in Jira

To implement sprints in Jira set of steps need to followed. They are listed below.

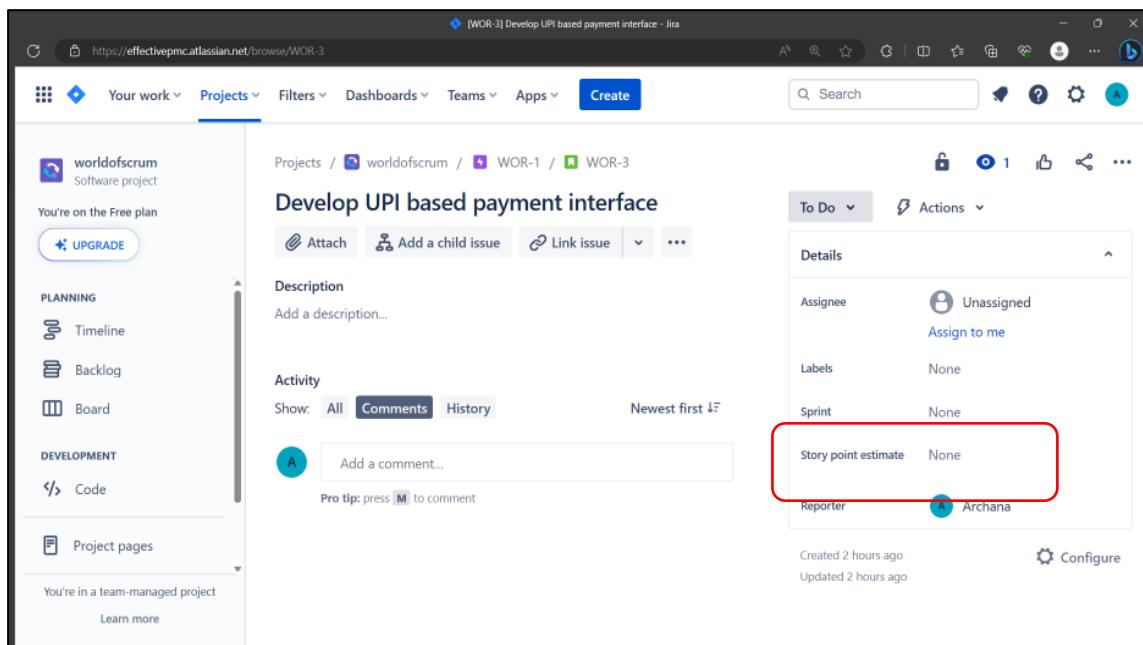
Hold the sprint planning meeting

Sprint planning meeting allows the entire team to discuss the sprint goal and the stories from product backlog. The development team creates detailed tasks and estimates for the high-priority stories. The development team then commits to completing a certain number of stories in the sprint. These stories and the plan for completing them become what is known as the sprint backlog.

Click here to know the steps to [create Sprint Backlog](#).

Add Story point estimate:

Once the stories for sprint are decided, team needs to add story point estimates to your stories by adding a number in the **Story point estimate** field.



The screenshot shows a Jira issue details page for 'WOR-3' titled 'Develop UPI based payment interface'. The 'Details' section is open, showing fields for Assignee (Unassigned), Labels (None), Sprint (None), and Reporter (Archana). A red box highlights the 'Story point estimate' field, which currently displays 'None'. Other visible fields include 'Description' (Add a description...), 'Activity' (Comments tab selected), and 'Created 2 hours ago / Updated 2 hours ago'.

create subtasks

If your stories are big you can think about breaking it down in Sub-tasks.

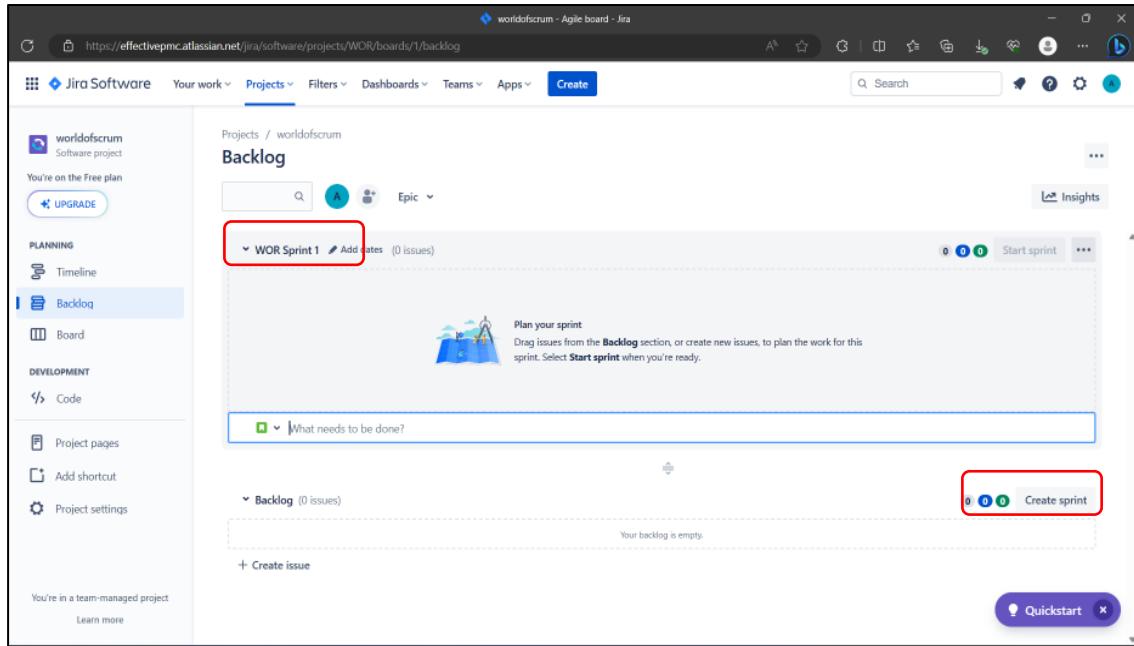
Read how to [create a Sub-Task](#) in JIRA

Create and Start the Sprint in Jira

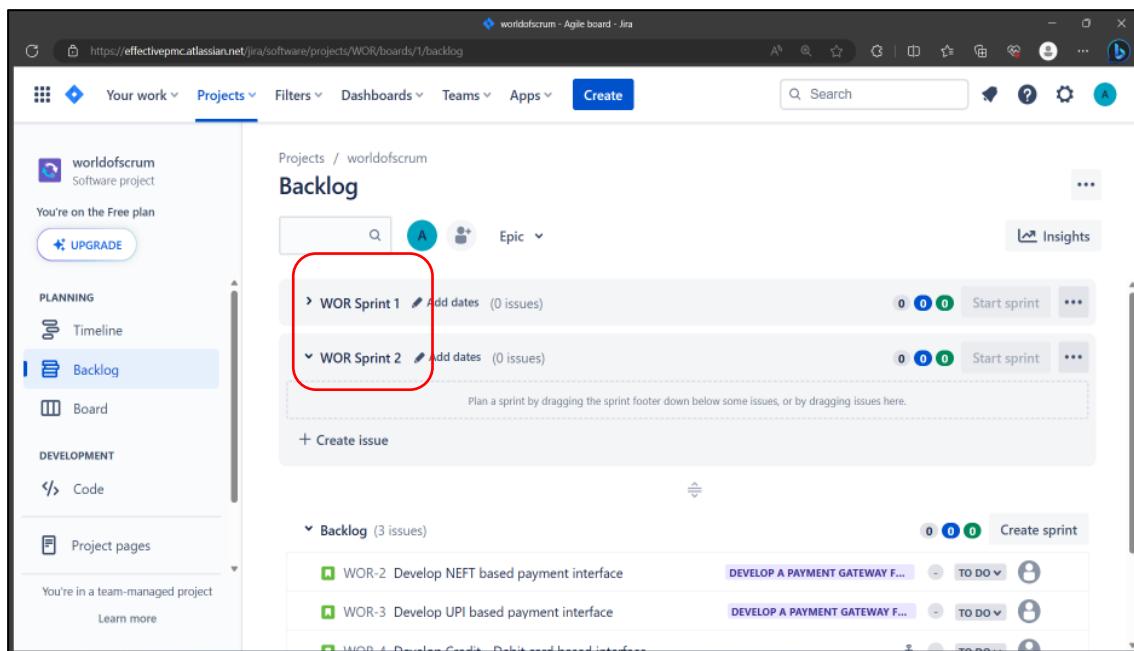
In Scrum, teams work on different tasks in sprints. These are scheduled periods, usually is of 4 weeks long. Before working with a sprint, the team usually holds a

special ceremony called a planning meeting to identify a sprint goal and define the issues for current sprint. Below are listed the step to create and start SPRINT in JIRA

1. A Default 1st sprint is created in JIRA as you create the project and backlog.
2. If you need to create more sprints go to the **Backlog** of your Scrum project.
3. Click the **Create Sprint** button at the top of the backlog

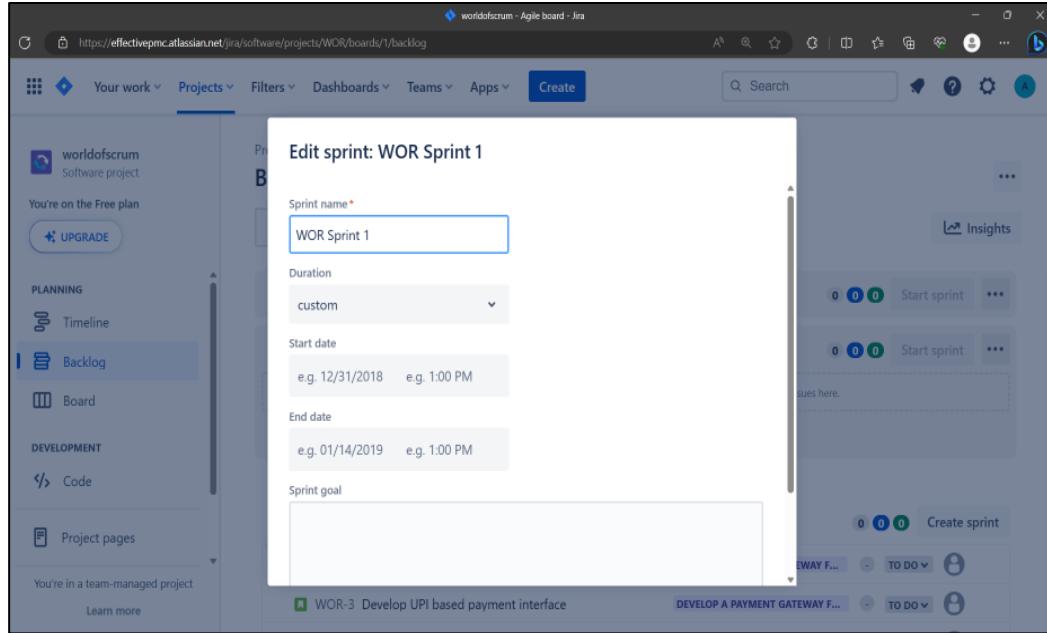


The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar is visible with options like Planning, Backlog (selected), Board, and Development. The main area is titled 'Backlog' under the 'worldofscrum' project. It shows a section for 'WOR Sprint 1' which has 0 issues. Below it is a 'Backlog' section with 0 issues and a note saying 'Your backlog is empty.' At the bottom right of the backlog section, there is a button labeled 'Create sprint' with three dots next to it, which is highlighted with a red box.



This screenshot shows the same Jira Software interface as the previous one, but now with two sprints listed: 'WOR Sprint 1' and 'WOR Sprint 2'. Both sprints have 0 issues. The 'Create sprint' button is still present at the bottom right of the backlog section. The entire 'WOR Sprint 1' and 'WOR Sprint 2' sections are highlighted with red boxes.

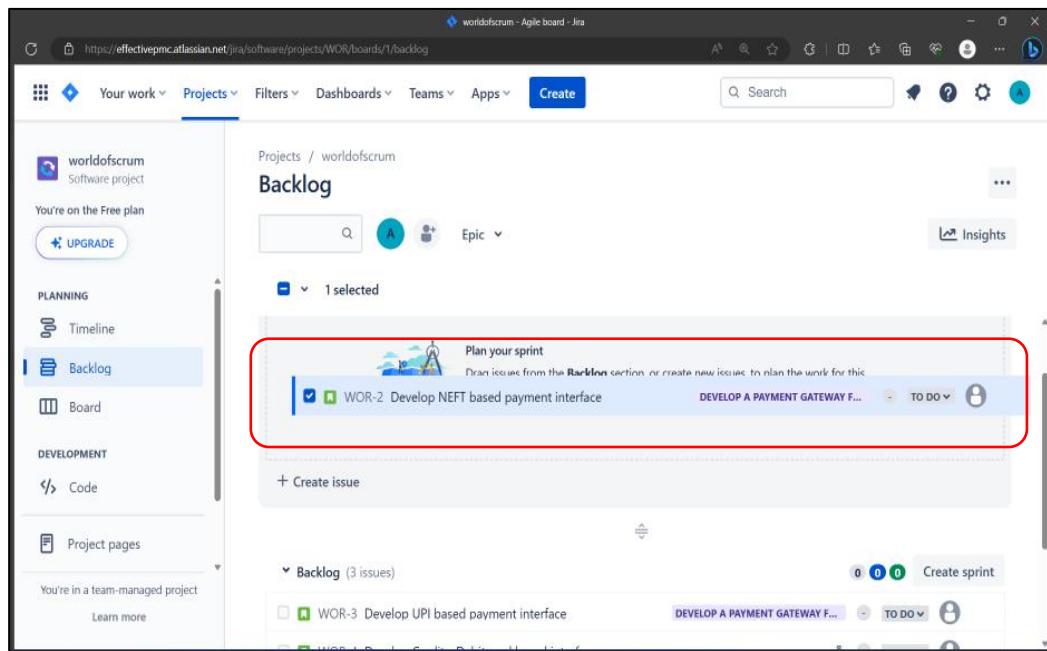
- Click on pencil icon to edit the sprint details.

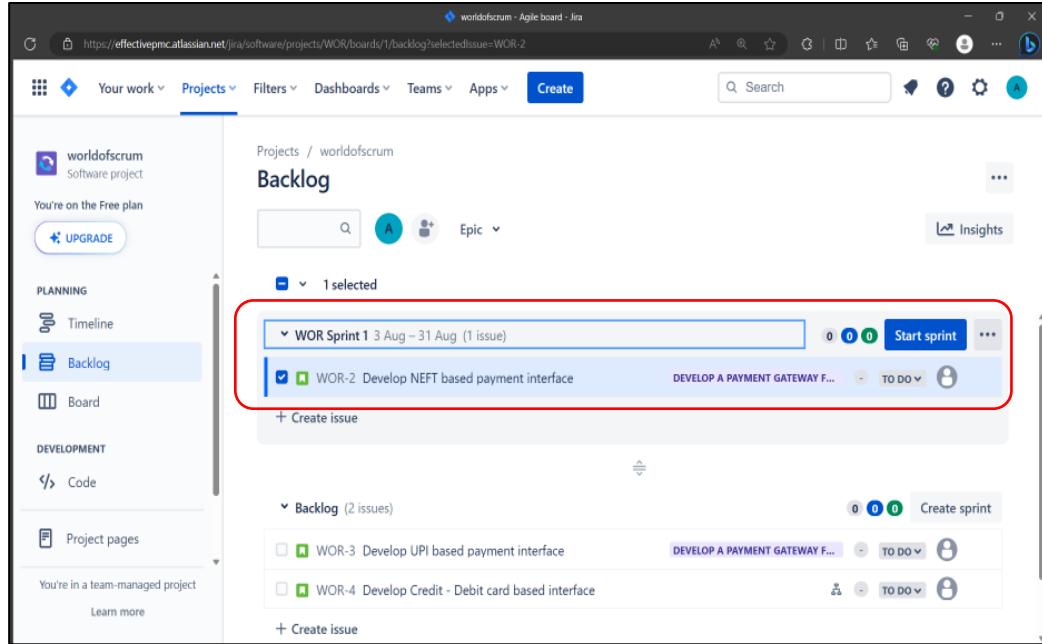


- Name the sprint.
- Add a duration of the sprint and start and end dates.
- Add the sprint goal as agreed to in the sprint planning meeting.
- Now fill your sprint with stories from the backlog

To add stories to your sprints

1. Navigate to the Backlog.
2. Drag and drop issues from the Backlog onto your sprint.

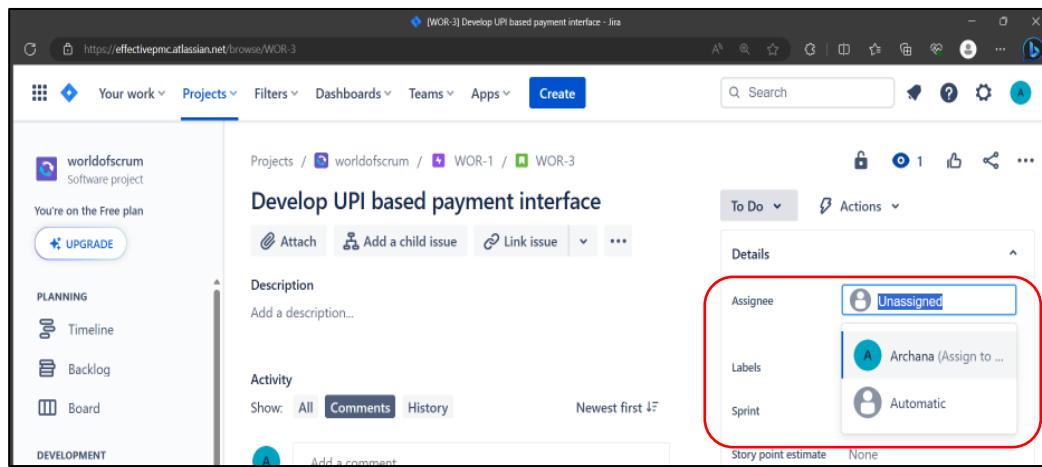




The screenshot shows the Jira Backlog interface for the 'worldofscrum' project. On the left, there's a sidebar with project navigation options like Planning, Backlog, Board, Development, and Project pages. The main area is titled 'Backlog' and shows a list of stories. One story, 'WOR-2 Develop NEFT based payment interface', is highlighted with a red box and has its details expanded. At the top of this expanded view, there's a button labeled 'Start sprint'. Below the story, there are buttons for 'DEVELOP A PAYMENT GATEWAY F...' and 'TO DO'.

To assign stories in JIRA

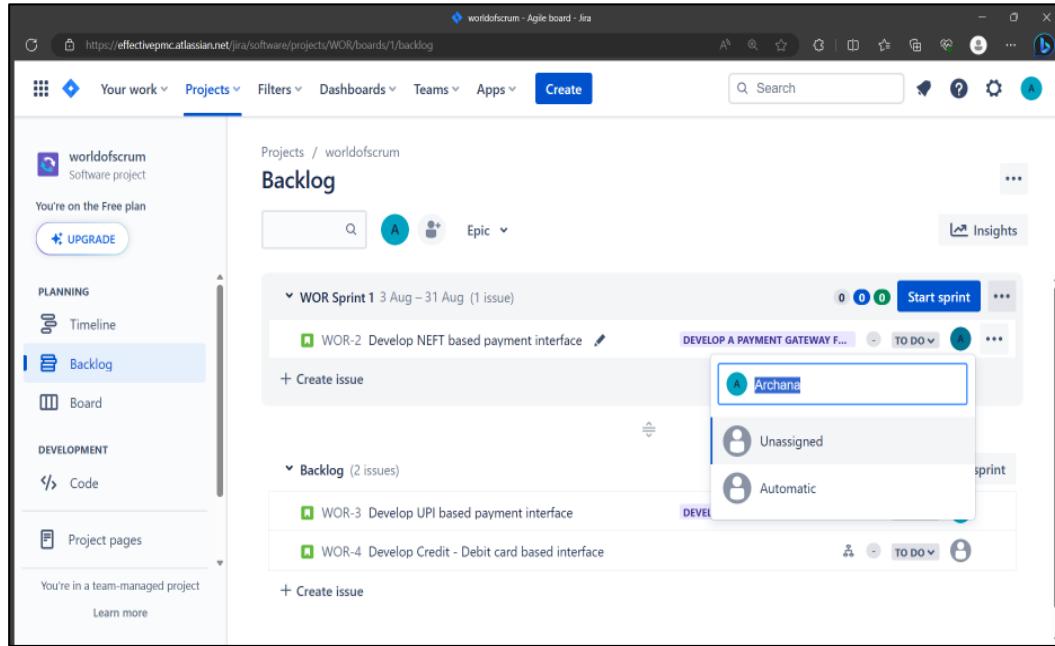
1. Navigate to the story you want to assign.
2. Open the details pane.
3. In "Assignee" select the team member name



The screenshot shows the Jira Story Details screen for issue 'WOR-3 Develop UPI based payment interface'. The right side of the screen has a 'Details' panel with several fields: 'Assignee' (set to 'Unassigned'), 'Labels' (with one item 'Archana (Assign to ...)'), 'Sprint' (set to 'Automatic'), and 'Story point estimate' (set to 'None'). The 'Assignee' field is highlighted with a red box.

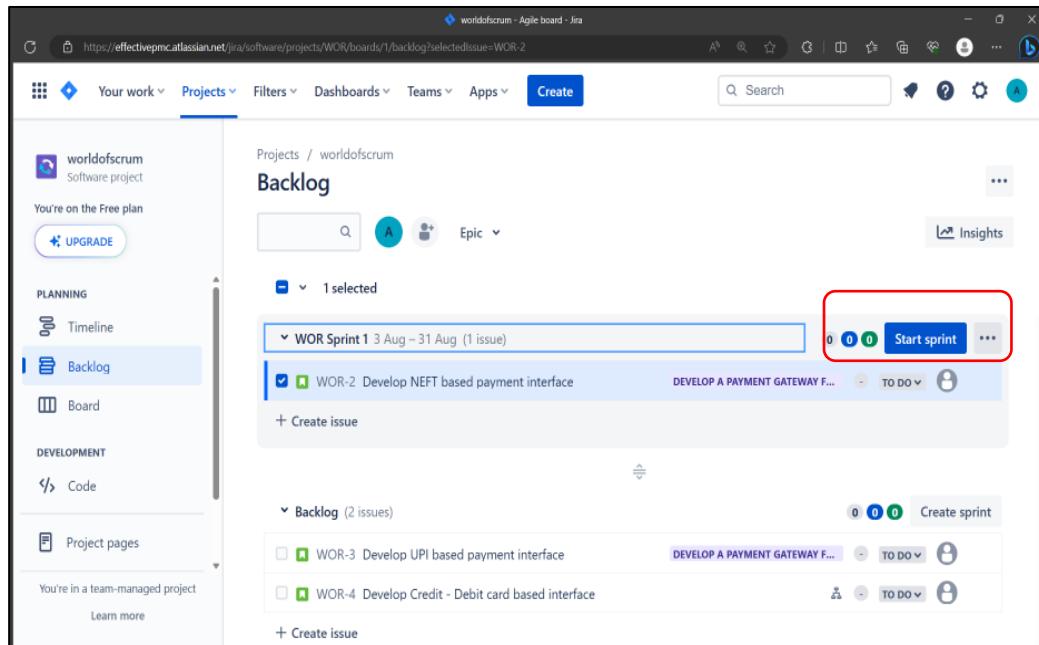
Or

Click on the assignee from backlog stories and select the team member.

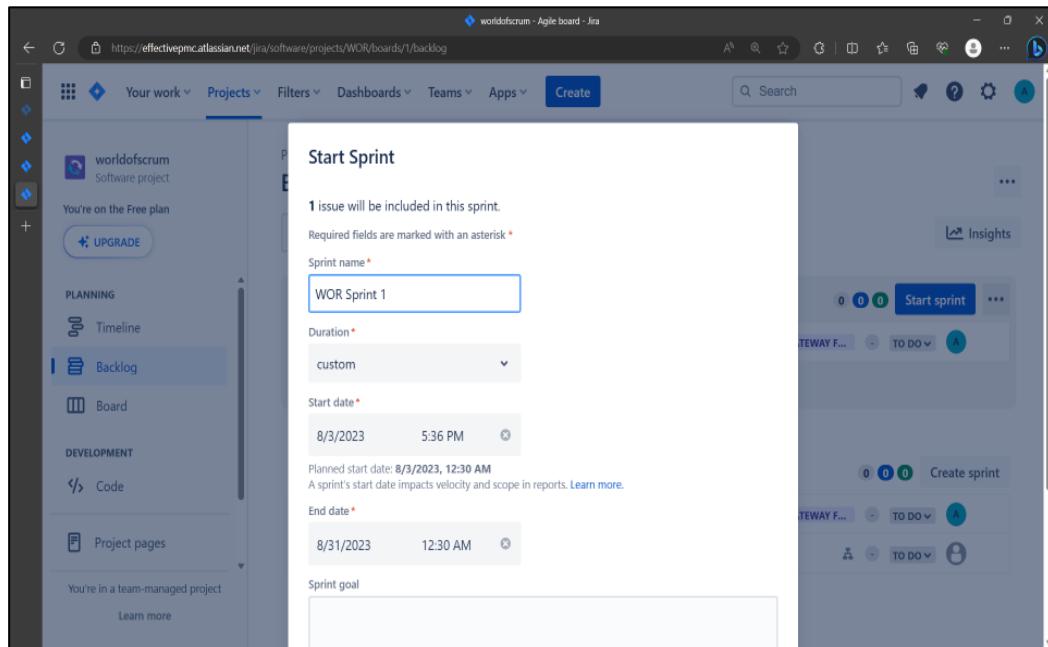


To start a sprint

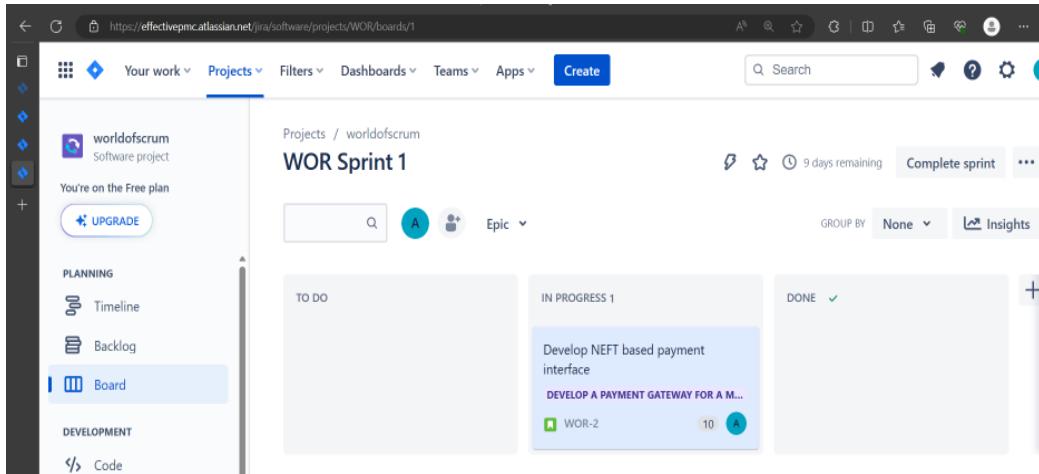
1. Go to the **Backlog** of your Scrum project.
2. Find the sprint that you want to start and click **Start Sprint**.



3. In **Start Sprint** dialog box Enter Duration / Start / End Date / SPRINT Goal.



4. Click “Start”
5. Your Project Board will display the SPRINT Workflow (TO-DO, In-Progress, Done)
4. Team will pick up the work – User Stories. (Moving them from To-Do to In-Progress status. Then eventually, done!)
5. To Change the Story Status, Just drag and Drop on Work Flow or Open the issue and Change the status.



6. Hold the daily standup meetings

[View Sprint Report & Burndown Chart in Jira](#)

Use **Sprint Report** to watch how your team advances throughout the assignments. To access it, go to the appropriate project, click **Reports > Sprint Report** and choose the suitable sprint from the drop-down menu. There is also a **Burndown Chart** in the **Sprint Report**. It shows the actual and estimated amount of work to be done in a sprint. The horizontal x-axis in a Burndown Chart indicates time, while the vertical y-axis typically indicates story points.

[Hold the sprint review meeting](#)

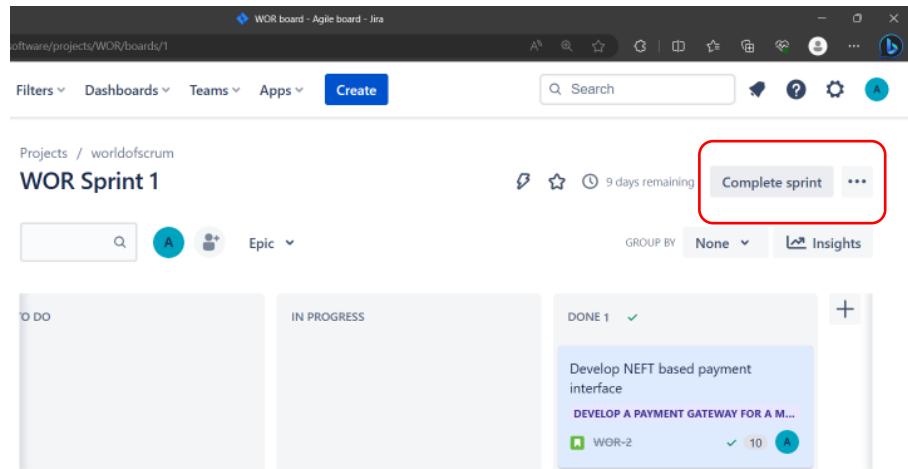
Sprint Review is a sharing meeting where the team shows what they've Created & delivered in that sprint. Each sprint usually produces a working part of the product called an increment.

[Hold the sprint retrospective meeting](#)

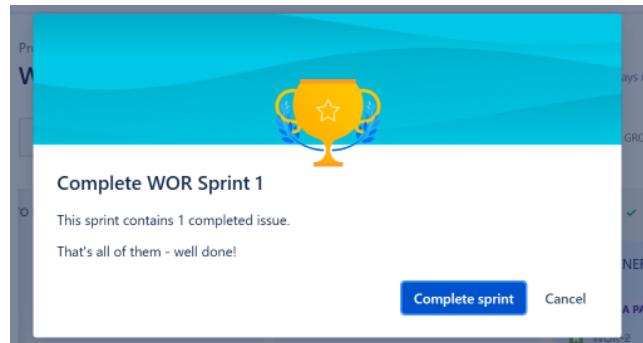
After you complete the sprint, have your team do a retrospective. Document your retrospective somewhere.

[Close the Sprint in Jira](#)

Go to the **Active** sprints in the Scrum board and choose the sprint to be closed in the drop-down menu. Then click **Complete Sprint**. Issues which were not completed from this sprint can be transferred to the backlog, other sprint, or a new sprint.



The screenshot shows a Jira Agile board titled "WOR Sprint 1". The board has three columns: "TODO", "IN PROGRESS", and "DONE". In the "DONE" column, there is one card with the title "Develop NEFT based payment interface" and a subtitle "DEVELOP A PAYMENT GATEWAY FOR A M...". Below the card, it says "WOR-2" and "10". At the top right of the board, there is a red box highlighting the "Complete sprint" button.



Repeat step From “Hold SPRINT Planning Meeting” to “Close SPRINT” for each Sprint.

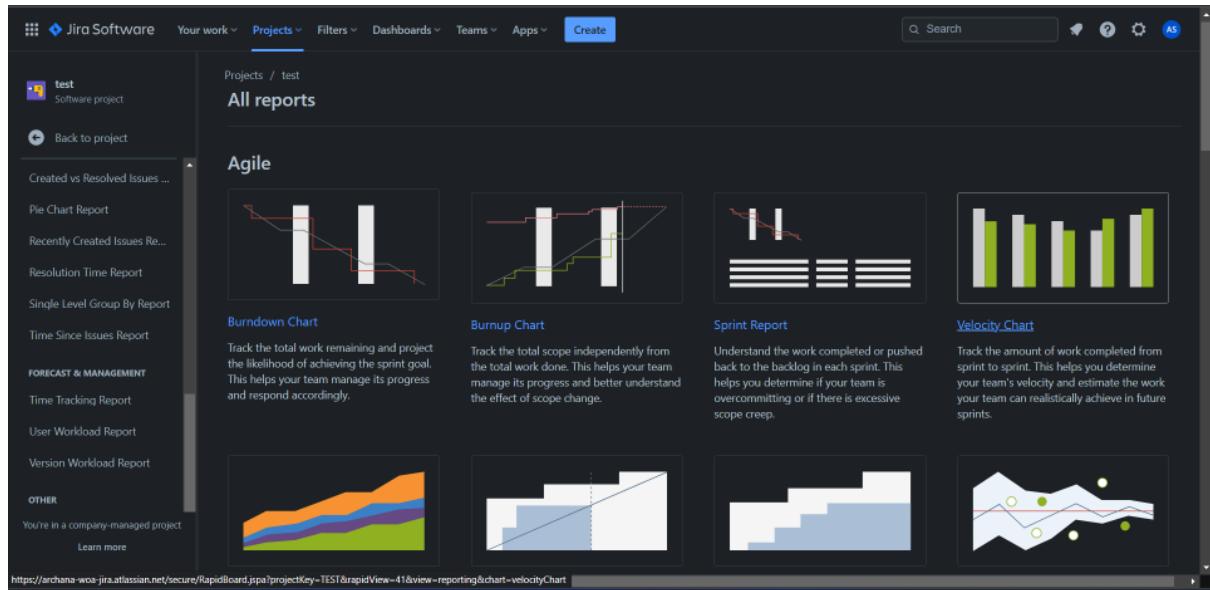
How to Access Jira Reports

JIRA provides different types of reports within a project. It helps to analyze the Progress, Issues, Showstoppers and Timeliness of any Project. It also helps to analyze the resource utilization as well.

How to Access Reports

To access reports in JIRA, the user should go to Project → choose Specific project. The following screenshot shows how to navigate to a specific project.

Click on the Reports icon on the left side of the page. It will display all the reports supported by JIRA. The following screenshot shows how to access the Report section.



The screenshot shows the Jira Software interface with the 'Projects' tab selected. On the left sidebar, under 'Agile', there are four report categories: 'Burndown Chart', 'Burnup Chart', 'Sprint Report', and 'Velocity Chart'. Each category has a brief description and a corresponding chart preview. The 'Velocity Chart' is highlighted with a yellow box.

Type of Reports

JIRA has categorized reports in four levels, which are –

- Agile
- Issue Analysis
- Forecast & Management
- Others

Let us now discuss the features of the above-mentioned report categories in detail.

Agile

Following are the list of features of Agile Reports.

- **Burn down / Burn Up Chart** – Track the total work remaining, also whether sprint is achieving the project goal or not.
- **Sprint Report** – Track the work completed or pushed back to the backlog in each sprint.
- **Velocity Chart** – Track the amount of work completed from sprint to sprint.
- **Cumulative Flow Diagram** – Shows the statuses of issues over time. It helps to identify high-risk issues or unresolved important issues.
- **Version Report** – Track the projected release date for a version.
- **Epic Report** – Shows the progress towards completing an epic over a given time.
- **Control Chart** – Shows the cycle time for the product, its version or the sprint. It helps to identify whether data from the current process can be used to determine future performance.
- **Epic Burn Down** – Track the projected number of sprints required to complete the epic.
- **Release Burn Down** – Track the projected release date for a version. It helps to monitor whether the version will release on time, so mandatory action can be taken if work is falling behind.

Issue Analysis

Following are the list of features of Issue Analysis.

- **Average Age Report** – Displays the average age in days of unresolved issues.
- **Created Vs Resolved Issue Report** – Display the number of issues created vs the number of issues resolved in given period.
- **Pie chart Report** – Shows a pie chart of issues for a project grouped by a specified field.
- **Recently Created Issue Report** – Shows the number of issues created over a time-period for a project and how many of those were resolved.
- **Resolution Time Report** – Displays the average time taken to resolve issues.
- **Single Level Group by Report** – It helps to group the search results by a field and see the overall status of each group.
- **Time since Issues Report** – It helps to track how many issues were created, updated, resolved, etc., over a time-period.

Forecast & Management

Following are the list of features of Forecast and Management type of reports.

- **Time Tracking Report** – Shows the original and current time estimates for issues in the current project. It can help to determine whether work is on track for those issues.
- **User Workload Report** – Shows the time estimates for all unresolved issues assigned to a user across projects. It helps to understand how much a user is occupied, whether overburdened or has less work.
- **Version Workload Report** – Displays how much outstanding work is remaining per user and per issue. It helps to understand the remaining work of a version.

Generate A Sample Report :

Burndown Chart

It displays the total work remaining to achieve the sprint goal for a given time to sprint. It helps the team to manage the progress and respond accordingly. This chart is an important feature of Agile – Scrum methodology.

Generate a Report

To generate a report, the user should follow the steps given below.

Step 1 – Go to Project → choose a Specific project. Click on the Report icon on the left side of the menu. Go to Agile and click on Burndown chart. The following screenshot shows how to access a Burndown Chart.

