Jira Project – Notes & Key Concepts

These are my personal notes while completing the "Jira Project Management Course" . They include key concepts, definitions, and screenshots from my practice on Jira Software Cloud.

Jira software - for developers, jira work management - for project managers, as of 2024 these both have been merged into one (called jira)
Jera support management - earlier known as jira service desk, has features of a support help desk
Jira product discovery - helps in product management to capture ideas and organize work flow
You can get jira license in 2 ways - data centre(customized for ur org, u have it locally and take care of everything), cloud(jira handles everything from ensuring latest version to maintenance, less customization)

Jira is a project management and issue tracking tool

Few examples of how companies organize projects
Waterfall : linear and sequential approach, where each phase of the project should be completed before moving on to the next. Mainly used in construction and manufacturing.
Critical path method : focuses on the longest sequence of tasks(critical path) that have to be completed first to ensure that the project is done by deadline.
Prince2 : Projects IN Controlled Environments. Structured method, divides project into manageable stages, mostly used in the public sector.

Jira used Agile, it is based and built on it. Agile focuses on collaboration, iteration and continuous development. Agile is a software development methodology, it helps organizations efficiently organize their work through self management and collaboration.

Agile workflows are executed on agile boards. Agile boards have certain columns in jira, each column has a heading. The main ones are : you have 3 columns. To do, In progress, Done.

There are 2 different types of agile frameworks/boards which we use in jira : scrum and kanban. Scrum and kanban are frameworks, based on what framework you are using, you can pick the agile board accordingly.
Scrum : a framework that uses sprints to get work done. Sprint? Predetermined amount of time for your team to get pre-determined work done.
How to add work mid sprint : Default : add to backlog(in jira, the default setting to add new work is to add it as backlog and continue with the work at hand,backlog means its not done yet and

has to be done, ensures that u dont add new work mid sprint, when the next sprint meeting happens, this backlog work can be taken care of)

Next option - Remove tickets from sprint : delay the correct work and do the new task at hand. Accommodate in the same time line.

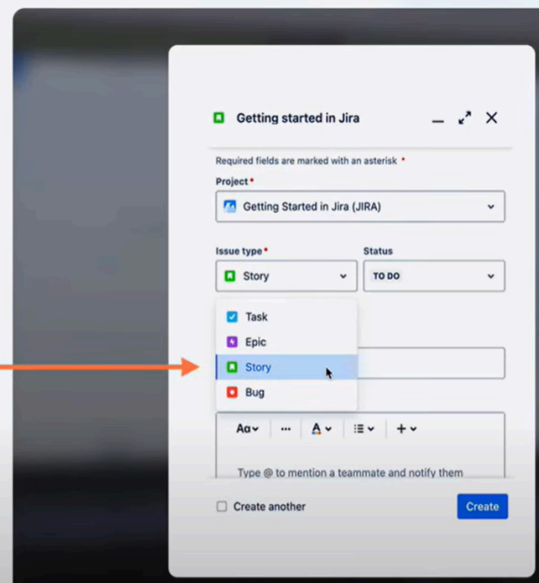**Kanban :** it is the agile framework which uses continuous workflows instead of sprint to get work done

Stand up meeting : quick meeting, everyone on the team reviews what they have done the day before, what they will do today and the roadblocks they are facing.

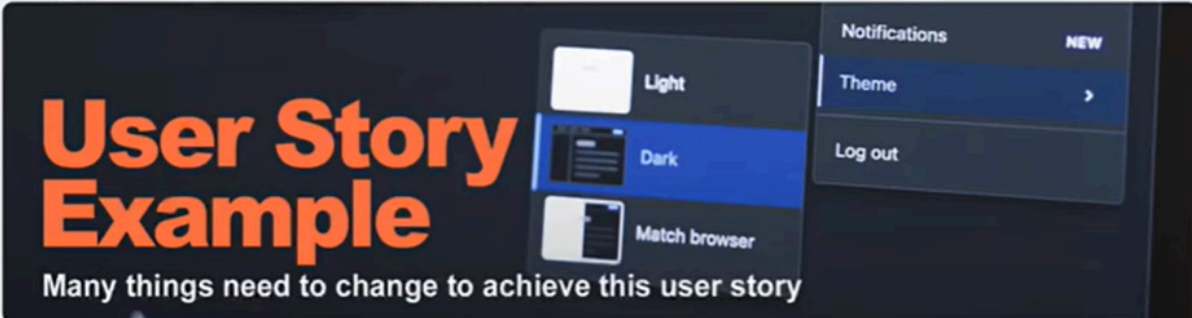Teams using kanban rely more on stand up meetings than the teams using scrum.

Story : creating a new issue on jira. A story issue type refers to an agile term known as user stories.

Agile Terms in Jira: Stories & Epics

User Story Example

Many things need to change to achieve this user story

Dark Mode Theme

A dark mode theme will include the background and font color, icon changes, and all the elements when the user toggles dark mode.

Toggle Switch

Of course, you'll have to build a toggle switch for users to switch between light and dark modes.

Persistent User Preferences

Another key function of dark mode is remembering what theme each user has. This requires some more work beyond creating the theme and toggle.

SECTION 2   **Concepts You Need to Know Before Using Jira**

What's a user story?

As a <Type of user> i need/want<some goal> so that<some reason(why you need it)>

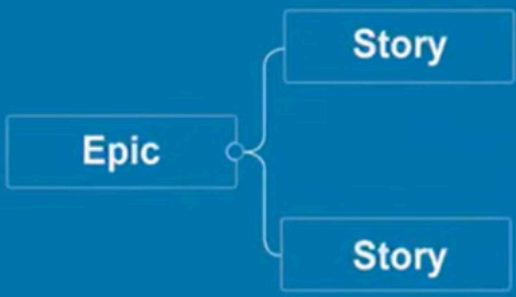Example : as a website user, I want dark mode so that my eyes are not strained.

The user story is more like a particular feature. One feature of the whole website. Multiple stories together make up a website

Multiple stories -> epic -> epics put together -> website

Agile Terms in Jira: Stories & Epics

Epics & Stories

An Epic is how you track multiple Stories that correlate with each other. This helps everyone on the team see the progress of the bigger picture.

Epic — Story

Epic — Story

Epic : Think of it as the parent of the story issue type. Epic is how you track multiple stories related to each other. This helps everyone on the team see the progress of the bigger picture.

Agile Terms in Jira: Stories & Epics

Epic: User Settings

- Story: Dark Mode
- Story: Profile Picture
- Story: Login & Security

Epics & Stories

Issue (i-shü)

Issues are at the heart of what you need to track. They are containers for all the fields in Jira.

All the data that you have to track in jira, are stored in issues. Assume a sticky note to be an issue, each sticky note acts as a container, where u write ur data with pen/pencil.

Project: Web App

- BUG
- STORY
- STORY

Project: Marketing

- STORY
- TASK
- TASK
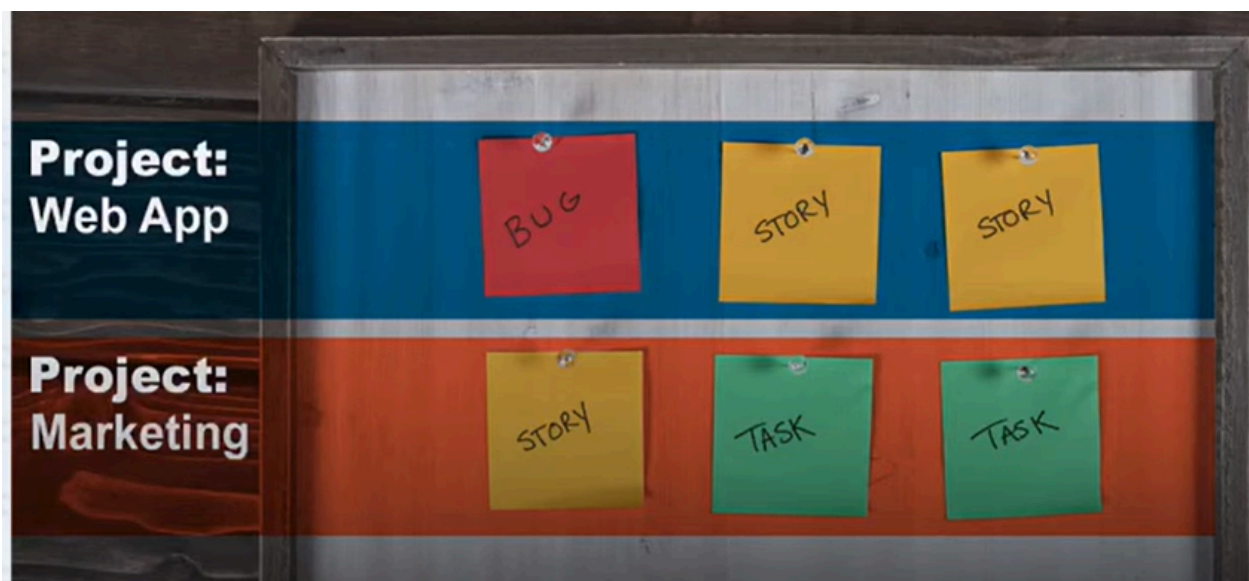
Projects are containers for issues. How you configure issue types, fields, etc. Inside stories u have fields, fields describe the work/task to be done.

Company managed projects(classic projects) : Lets you share settings and entities with other company managed projects.
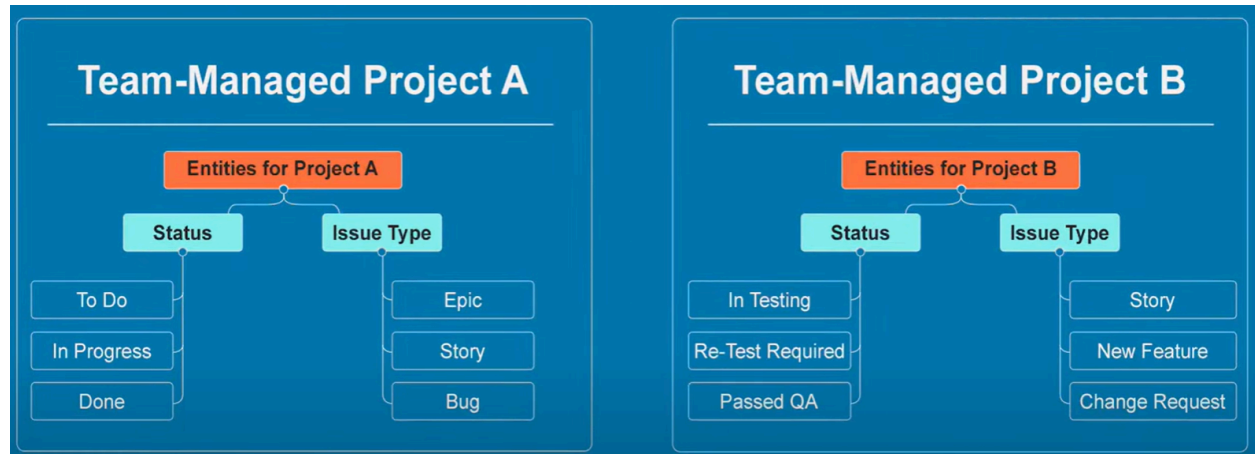

Team managed projects(next-gen projects) : Team managed projects are self contained. That means all the entities like issues, statuses etc stay inside/live within the project, these cannot be shared by other projects. You don't need special permissions to create and modify a team managed project. Power lies with jira administrators : who can create a jira team managed project.

Team-Managed Projects vs Company-Managed Projects
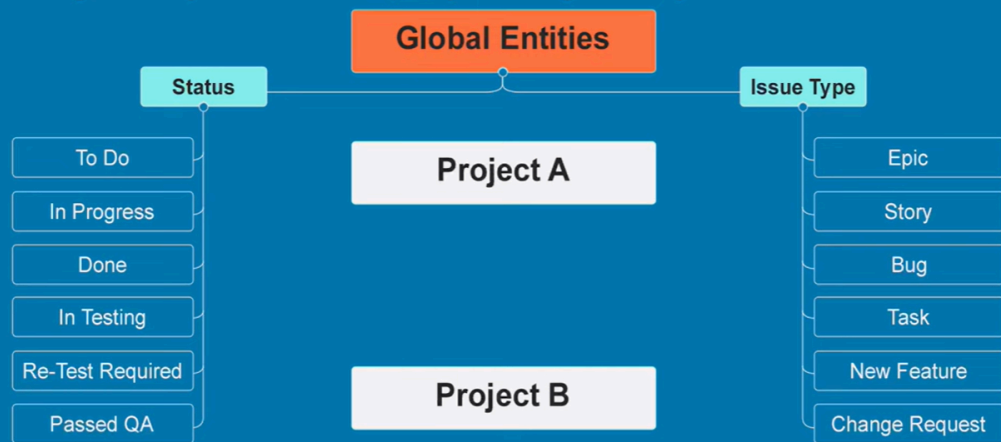
Entities in Company-Managed Projects

You can hook up any number of projects to any number of features here
Suppose project A wants to have a new feature and at the same time project B wants to have a new feature, connect both project A and project B to the new feature.

It can be anything, not just a new feature. It can be a new sub task too, company managed project means, this change is done at once in all projects and you don't have to explicitly do it in each.
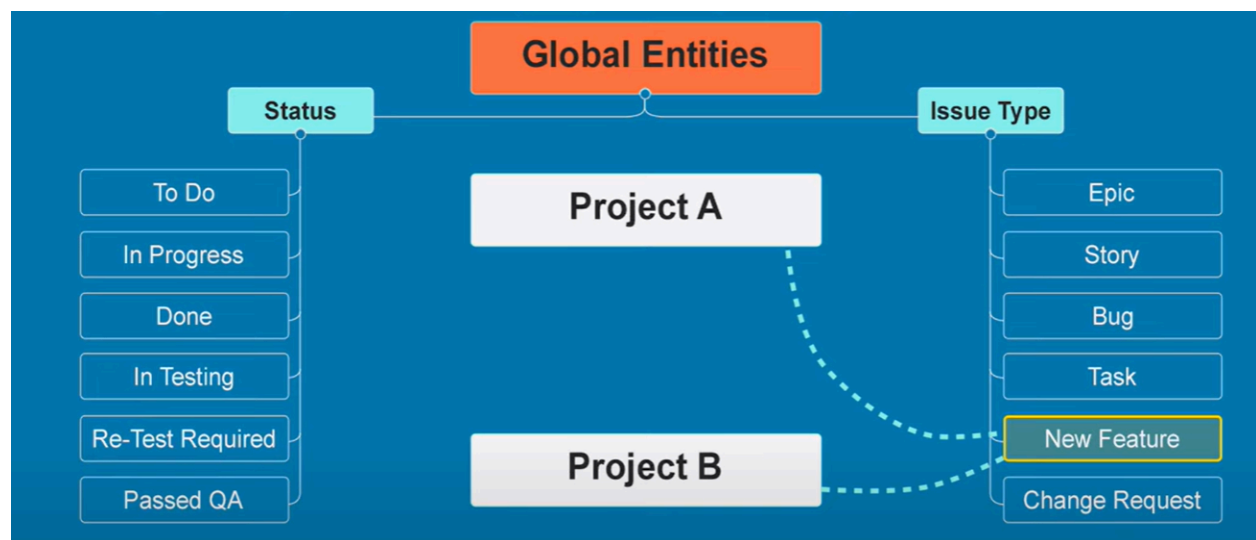
If you click on create, it lets you create a whole new issue. The summary field is very important in this, mandatory to write.

There is a watch sign(eye) when you press on create/open ur task, this means that you are watching this particular project and any changes or updates on it will be emailed to you. If you switch this button off you won't be getting emails or notifications corresponding to this.

How to give project access to your team?
Go to teams/ projects and add more people, or go to project settings and click on access, then add.
You can create a new role, specify what kind of access they can be given and what should be performed. Like if you want someone to be above a member but below an actual administrator, you can write the description as "basically an admin without adding users", then tick the features in the check box below to enable that.

Customizing issue types in a team managed project : like initially we have only task and epic, now go to project settings, we can add stuff like story, bug etc
Go to work type , click on add work type (select bug story or add your own)
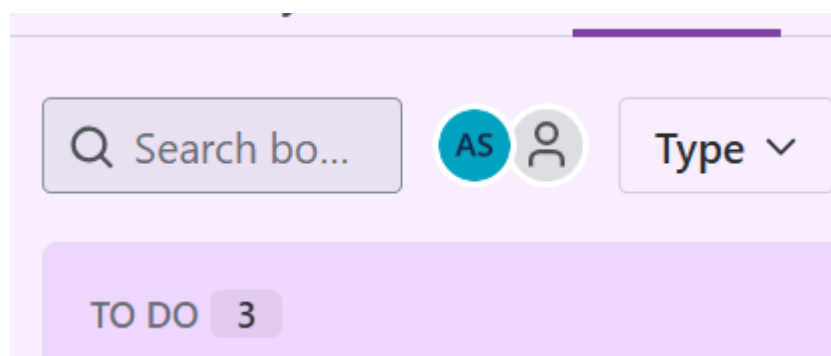
Configuring the agile board :
So if you click on that name or the icon, it shows only the to do of that particular person and not the whole to do tasks. If you want to see the work of 2 people for example, click on their 2 icons or more(whichever u wanna see) and that gets highlighted. Click on the unassigned once and assign them accordingly. You can click on the type to see what kind of task it is, whether it is task or a new feature(according to our project) and it shows only that.

Examples of Custom Filters:

- `assignee = currentUser() AND status = "In Progress"`

Shows issues assigned to you that are currently in progress.

- ```
  project = "Marketing" AND priority = High AND due <= endOfWeek()
  ```

Shows high-priority tasks in the Marketing project due this week.

This is how we use the custom filters option in jira. When we apply filters like these it shows only those specific tasks or issue types.
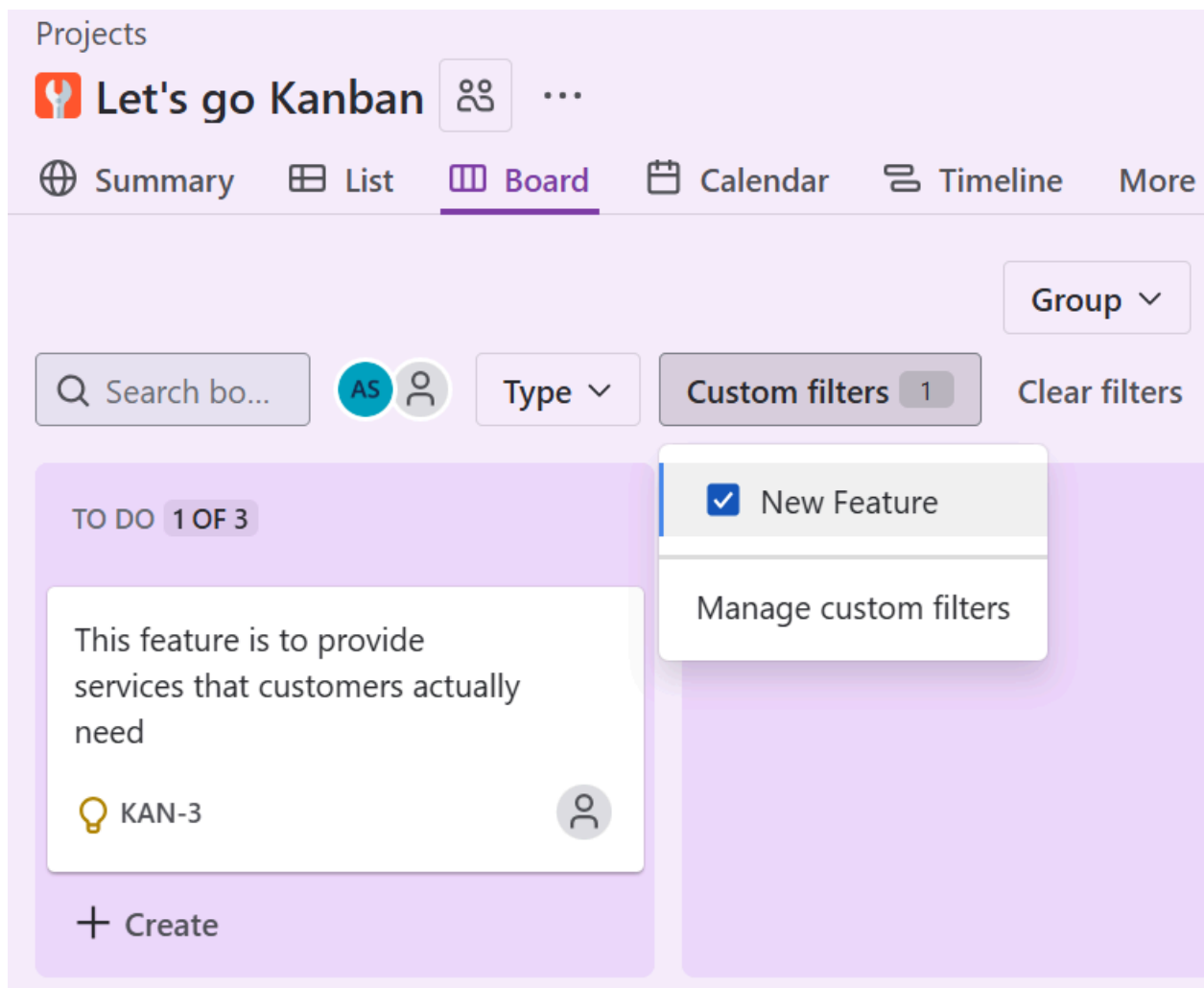
In agile, we work on the board from left to right, to do first, then in progress, then done. You can configure the board : change the name from in progress to working on it(still shows in progress at the status), can add more columns on the board(after done or in between).

Feature	What It Does	Visual Cue	Example Use
Add Label	Tag issues with keywords	Label list on issue	`urgent`, `frontend`, `release2.1`
Add Flag	Marks an issue as blocked or stuck	🔴 red flag on card	Waiting on client input
Link Work Item	Connects related issues	Issue Links section	`BUG-123` blocks `TASK-456`

There is an option to update work flow, so after creating, you can set the default to in progress/review,instead of the issue type being To Do.

Changing from kanban to scrum with features : Backlog, sprint, estimation.. Go to features and turn on these three features to change it from kanban to scrum.

Changing from Kanban to Scrum with Features

Story Points

A unit of measurement that is defined by your team (similar to Sprints) to determine the overall amount of work, complexity, and uncertainty involved.

Changing from Kanban to Scrum with Features

Story Points (an example)

Build podcast playback functionality: 6 hours

Testing by QA: 1 hour

External client verifying functionality: ??

In a **Scrum board** in Jira, the **Estimate** field represents the **amount of effort or time** a team expects an issue (like a story or task) to take.

Estimation Type	Description	Example
Story Points	Relative size/complexity (effort-based)	3 SP
Time Estimates	Actual time (in hours or days)	4h, 1d
Custom Units	Some teams use T-shirt sizes (S, M, L) etc.	M

Issue	Estimate (Story Points)
Build login page	3 SP
Setup database	5 SP
Fix UI bug	1 SP

Total estimate for the sprint: **9 story points**

Using the timeline view :

Feature / Use Case	Scrum/Kanban Boards	Timeline (Roadmap)

Focus	Day-to-day task execution	High-level planning & scheduling
View	Status-based (To Do → Done)	Time-based (Start → End dates)
Ideal for	Teams managing sprints or workflow	Managers/PMs coordinating roadmaps
Sprint tracking	✅ Yes (Scrum)	🚫 Not meant for sprint tracking
Time planning	❌ Not visual by time	✅ Clear visual of schedules
Dependencies	❌ Hard to track	✅ Easily show "blocks"/"blocked by"
Adjusting timelines	❌ Manual	✅ Drag-and-drop to shift tasks
Cross-team planning	❌ Hard to see	✅ See all teams' work in one view

+++ Use **Scrum/Kanban boards** for **execution**
Use **Timeline** for **planning, scheduling, and strategy**

Working with the calendar : Stories under the epic on the calendar show up only when there is a date associated with them. If there is no date, only the epics are shown.

Overview of the list view :

How forms work in jira :

Exploring jira's issue navigator :

Creating our first goal in jira : Goals are used to indicate the end goal of our project, like launch the agency website and generate leads or for example if ur building a podcast app, launch the app on playstore.

Purpose	**Description**

🧭 **Define direction**	Clarify **why** you're doing the work
🔗 **Link strategy to execution**	Connect tasks (issues, epics) to a business objective
📊 **Track progress**	Monitor how much work is done toward achieving a goal
🤝 **Align teams**	Ensure everyone works toward the **same outcomes**

📘 Example:

Let's say you're working in a product team.

Goal:

🚀 *"Improve user engagement by 20% this quarter"*

You can **link this goal** to:

- Epic: "Revamp onboarding flow"

- Story: "Add product tour"

- Bug fix: "Fix broken notifications"

Now Jira can track the **combined progress** of all linked items toward that **goal**.

Understanding the daily work flow : we set a timer of 1 min each for each person and they say : what did they do yesterday? What will they do today? Any issues blocking progress? This is called stand up.