

## TUTORIAL

# Learn how to use Epics in Jira Software

A guide on how to use and create epics in Jira Software



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## Jira Epics Tutorial

This tutorial will explain how to use epics in agile software development with Jira Software. It will focus on epics in company-managed and team-managed projects.

### WHEN SHOULD I CREATE AN EPIC?

Consider creating an epic if you have a large body of work that needs to be completed over several sprints or over a long period of time. You can also create an epic when you notice a pattern among several user stories, and you want to bundle them into one group. Check out our guide on [Epics](#) to learn about examples and templates.

If you're using a team-managed project, click [here](#).

### Time:

10 minute read. Complete over 2 weeks or more

### Audience:

You are new to agile software development or Jira Software

### Prerequisite:

You have created a Jira Software account, and a Jira Software project (Scrum or Kanban)

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## Working with epics in company-managed projects

Step 1: Create a new epic in Jira Software

There are three ways to create epics in Jira Software the Roadmap, Backlog, and Global Create issue button. When you create an epic, you'll need to enter the following details:

- **Epic name** - A short identifier for your epic. This will be used as a label on issues that belong to this epic.
- **Epic summary** - You'll see this whenever Jira displays the epic.

### Create an epic on the Roadmap

The [roadmap](#) is useful for visualizing and planning large pieces of work that may be in progress right now or you may prioritize in the future.

First, enable the roadmap.

- 1 From your board select **More (...)** in the top right corner > **Board settings**
- 2 In the **Roadmap** tab, enable the feature for your project.
- 3 Then, select **Roadmap** from the menu on the far left.
- 4 Hit + **Create epic** on the **Roadmap**. If your **Roadmap** is empty, simply start typing to create your first epic.

The screenshot shows the Jira Roadmap interface for a project named 'iOS App'. On the left, a sidebar navigation bar includes links for Board, Roadmap (which is selected and highlighted in blue), Backlog, Active sprints, Reports, Issues, Components, Code, Releases, Pages, Slack integration, Add item, and Project settings. The main area is titled 'Roadmap (BETA)' and shows a timeline for the month of October. A vertical orange line marks the current date. Several epics are listed on the left side of the timeline, each with a purple icon and a title: 'IOS-1 App Basics - iOS', 'IOS-9 Trip management', 'IOS-20 Group booking experience' (which is currently selected and highlighted in yellow), 'IOS-22 Social media integrations', 'IOS-21 Team invitations', and 'IOS-26 New Epic'. At the bottom of the list, there is a '+ Create Epic' button. Above the timeline, there are buttons for Status and Type, and a search bar with placeholder text 'Search'.

**Pro tip:** You can also create a new epic by hovering between epics on the roadmap. [Learn more about roadmaps in Jira Software](#).

### Create an epic from a new issue

You can create epics and any other issue types using the global navigation menu.

SELECTED FOR DEVELOPMENT 0 | IN PROGRESS 0

- 1 Click the **create** button located in the global navigation bar at the top of the screen.
- 2 Select **Epic** for the issue type.

Create issue

Configure fields ▾

Project\*  
TIS Webstore Development ...

Issue Type\*  
Epic

Some issue types are unavailable due to incompatible field configuration and/or workflow associations.

Epic Name

Provide a short name to identify this epic.

Summary\*

Priority  
Minor

Description

## Create an epic from the Epic Panel in the backlog

dev

Backlog

Quick filters ▾ Assignee ▾

VERSIONS Developer Sprint 4 issues 22/Feb/16 1:09 PM • 07/Mar/16 1:09 PM

EPICS ...

- + My customers can't check out in the shopping cart
- Finance system - systems backup bug causes DB to crash
- TIS webstore finance report plugin update
- Webstore billing bug causes outage

dev Sprint 2 4 issues

- 1 Navigate to the **Backlog**.
- 2 Click on the **Epics Panel**.
- 3 Hit **Create Epic**.

Backlog

Epic

Issues without epic

> Epics 1

> Epic 2

+ Create Epic

NP2 Sprint 2 1 issue

NP2-1 Work item

+ Create issue

The screenshot shows the Jira Backlog interface. At the top, there's a header with the word 'Backlog'. Below it, a list of issues is shown: 'NP2-3 3' and 'NP2-4 4', each with a checkmark. At the bottom right of the list is a blue button labeled '+ Create issue'.

## Step 2: Add stories or child-issues

When you've created an epic, you'll need to add stories or child-issues to it.

### WHAT'S THE DIFFERENCE BETWEEN EPICS AND OTHER ISSUE TYPES?

Stories, bugs, and tasks describe a single piece of work, while epics are used to describe a group of issues that all relate to the same, larger body of work. Epics are typically completed over several sprints, or a longer time frame if you don't use sprints. Check out our [guide on delivery vehicles](#) to learn how agile teams gracefully manage scope and structure work. You can also reference the [guide to working with issues in Jira Software](#).

There are two ways to add a story to an epic:

### From the issue create a screen

- 1 Click **Issue** in the top-left corner. Select an issue type other than epic. Find the **Epic Link** field, and select your epic. Fill in any other details and click **Create**.

The screenshot shows the 'Create Issue' dialog box in Jira. It includes fields for 'Attachment' (with a 'Drop files to attach, or browse.' button), 'Linked Issues' (set to 'blocks'), 'Issue' (a dropdown menu with a '+' button), 'Assignee' (set to 'Automatic'), 'Epic Link' (a dropdown menu with a circled 'Choose an epic to assign this issue to.' placeholder), and 'Sprint' (a dropdown menu).

### From the Epics Panel

- 1 Navigate to the **Backlog**.
- 2 Open the **Epics Panel**.
- 3 Hit **Create issue in epic**.

The screenshot shows the Jira Backlog interface. At the top, there's a header with the word 'Backlog'. Below it, there are search and filter options: a search bar with a magnifying glass icon, 'Quick filters', and 'Assignee' dropdowns.

The screenshot shows the Jira interface with the Epics panel open. The Epics panel on the left lists two sprints: 'Alpha Squad Sprint 9' (4 issues) and 'Alpha Squad Sprint 10' (1 issue). The backlog on the right shows several items with checkboxes and descriptions, such as 'Nanotechnology immersion along the information highway will close' and 'Efficiently unleash cross-media information without cross-media value'. A 'Create issue' button is visible at the bottom.

## On the roadmap

- 1 Hover over an epic and click **+ Add a child issue**.
- 2 Choose an issue type, then hit enter.

The screenshot shows the backlog in Jira. An epic named 'CP-1 My first epic' has a child issue 'CP-3 Website redesign' added to it. A button labeled 'Add a child issue' is visible next to the epic. Other epics listed include 'CP-4 GTM Plan', 'CP-5 Large piece of secret work', and 'CP-6 Cross-team initiative planning'.

## To remove an issue from an epic

Navigate to either **Backlog** or **Active sprints**:

- In the **Backlog**, drag the issue onto the **Issues without epics** section at the bottom of the **Epics Panel**; or
- In either the **Backlog** or the **Active sprints**, click the relevant issue to display it on the right-hand side of the screen, then click the **x** in the epic name (e.g. "Apples" in Screenshot 1 below).

## Step 3: Viewing your epics

You can see information relating to all your epics in the Backlog.

The screenshot shows the backlog in Jira. Three numbered arrows point to specific features: 1 points to the 'Epics' button in the backlog header; 2 points to the 'Epics Panel' on the left; and 3 points to the 'x' icon in the epic name 'Apples' in the backlog list.

- 1 **Epics Panel:** Go to the **Backlog** and open the **Epics Panel** to view and manage your epics.

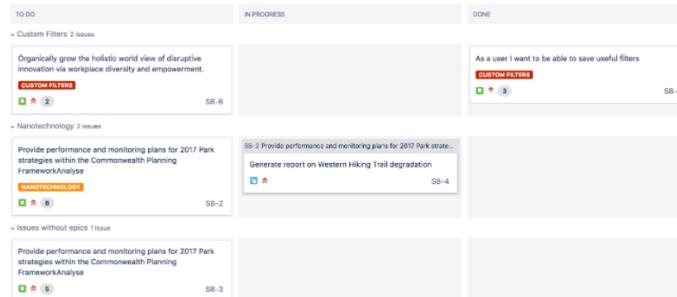
- 2 **List of epics:** The **Epics Panel** displays a list of all epics in your project.
- 3 **View issues in epic:** Click an epic's name to view all the issues belonging to that epic, across all sprints.

You can also view an epic issue to see a list of the stories it contains

The screenshot shows the Jira Epics Panel. At the top, there's a header with project navigation and a search bar. Below that is a section titled 'Issues in this epic' which lists three issues: CP-18 Styleguide refresh, CP-19 Audit E2E journey - consumer, and CP-20 User research. To the right of this list are details for the epic: Assignee (Unassigned), Reporter (Jessie Spiteri), Labels (None), Priority (Medium), and Epic Name (Website redesign). Below the epic details is a link to 'Show 6 more fields' (Story Points, Original Estimate, Time tracking, Components, Sprint and Fix versions). At the bottom of the panel, there are activity tabs (Comments, History, Work log) and a comment input field.

## Step 4: Set up swimlanes for your epics on your board

During a sprint, you might find it useful to divide your board into swimlanes for each epic, to make the board visually clearer.



Here's how you can set this up in Jira Software:

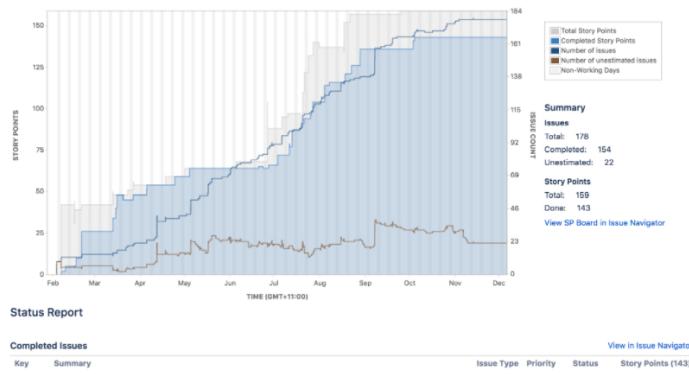
- 1 Navigate to the **Backlog** (or **active sprint**).
- 2 Select **more (...)** > **Board settings**.
- 3 Click on **Swimlanes**.
- 4 Under **Base swimlanes on**, select **Epics**.

When you start a sprint, your board will show issues grouped under their respective epics.

## Step 5: Monitor the progress of your epic

You may find it important to keep track of all incomplete issues attached to an epic. For example, if you have an epic that will span multiple sprints, you might find it useful to track the amount of work remaining over time so you can estimate when the epic will be completed.

In Jira Software, you can use the [Epic Report](#) to easily obtain this information.



## Step 6: Complete your epic

To complete an epic navigate to the backlog or roadmap

Backlog

- 1 Navigate to the [Backlog](#).
- 2 Open the [Epics Panel](#).
- 3 Click the drop-down for your epic, and select **Mark as Done**.

### USING AUTOMATION WITH EPICS

Automation is a great way to ensure your epics, stories, and sub-tasks always stay in sync. See one of the most common use cases in the Jira automation template library.

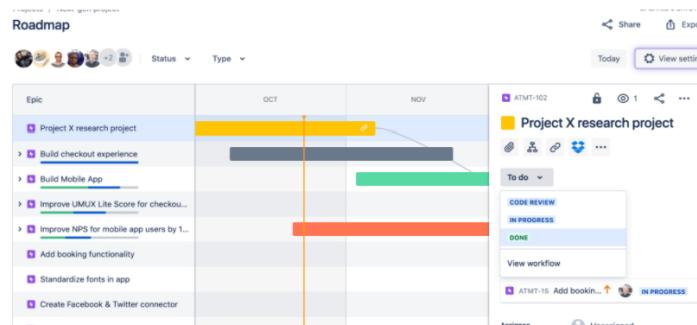
[Go to template](#)

The screenshot shows the Jira Backlog interface. In the top navigation bar, there are filters for 'Quick filters' and 'Assignee'. Below the header, the 'EPICS' tab is selected, showing 'Create epic' and a dropdown menu for 'Alpha Squad Sprint 9' which contains '4 issues' and 'Edit sprint'. The main backlog area lists 'Issues' (2), 'Completed' (1), 'Unestimated' (0), 'Estimate' (5), and 'Create issue in epic'. A magnifying glass highlights the 'Mark as Done' option under the 'Linked pages' section. Other sections include 'Nanotechnology' and 'Epic name'. At the bottom, there's a link to 'Issues without epics'.

Roadmap

- 1 Navigate to the [Roadmap](#)
- 2 Click on the **epic**
- 3 Click the status drop-down in the detail view and

select **Mark as Done**.



#### WHEN SHOULD I MARK AN EPIC AS DONE?



Mark your epic as done whenever all work for the epic is complete. To make this easier, we recommend coming up with a clear definition of done for your epic. Any stories linked to the epic don't have to be complete to mark an epic as done.

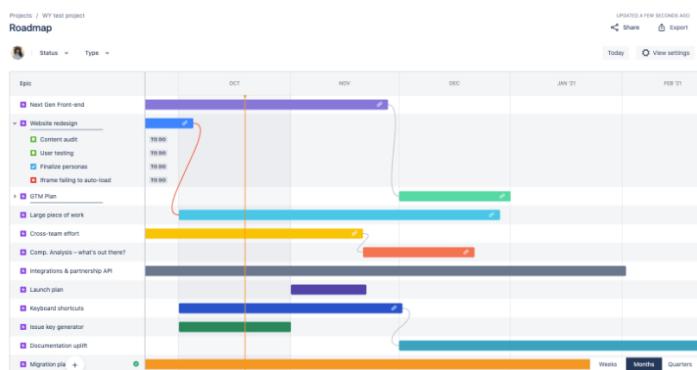
## Want to learn more?

For more detailed information on working with sprints in Jira Software, check out our [sprints tutorial](#).

Have questions? [Ask the Atlassian Community](#).

## Working with epics in team-managed projects

The Roadmap is a place where you can create, manage, and visualize your team's epics. Roadmaps are useful for planning large pieces of work several months in advance and to bundle together similar stories across different sprints.



### Step 1: Create a new epic in Jira Software

There are three ways to create epics in Jira Software,  
either via the Roadmap or the backlog.

from the Roadmap, Backlog, and using the global navigation menu. When you create an epic, you'll need to enter the following details:

- **Epic name** - A short identifier for your epic. This will be used as a label on issues that belong to this epic.
- **Epic summary** - You'll see this whenever Jira displays the epic.

## Create epics on the Roadmap

Epics are created and managed on the Roadmap. The Roadmap is useful for visualizing and planning large pieces of work that may be in progress right now or you may prioritize in the future.

- 1 In the project menu, select **Roadmap**.

The screenshot shows the Jira Roadmap interface for a project named "Next-gen software project". The left sidebar lists project management options like Roadmap, Backlog, Board, Reports, Code, Releases, Slack Integration, Add item, and Project settings. The main area displays a roadmap for October (OCT) and November (NOV). An epic titled "Project X research project" is expanded, showing its sub-tasks: "Build checkout experience", "Build Mobile App", "Improve UX/UI Lite Score for checkout...", "Improve NPS for mobile app users by ...", "Add booking functionality", and "Standardize fonts in app". Other tasks like "Add booking functionality" and "Standardize fonts in app" are collapsed.

- 2 Hit the + in the first column to create an epic. If your roadmap is empty, you can just start typing to create your first epic.

The screenshot shows the Jira Roadmap interface for a new project named "New Project". The left sidebar lists project management options like Roadmap, Backlog, Board, Code, Pages, Slack Integration, Add item, and Project settings. The main area displays a roadmap for the current month. An epic titled "What needs to be done?" is listed under the "Epic" column, and a single task is shown in the "In Progress" status under the "Status" column.

## Create an epic from a new issue

You can create epics and any other issue types from any screen using the global navigation menu. If you create an epic from your board view that epic will only display on your roadmap or backlog.

The screenshot shows the Jira global navigation menu at the bottom of the screen. It includes links for "Projects", "Filters", "Dashboards", "People", "Plans", "Apps", and a prominent blue "Create" button.

1 Click the **create** button located in the global navigation bar at the top of the screen.

2 Select **Epic** for the issue type.

### Create an epic from the Epics Panel in the backlog

To use a backlog for kanban toggle on your backlog feature in the board settings. See [Enabling the Kanban backlog](#) for more information.

1 Navigate to the **Backlog**.

2 Click on the **Epics Panel**.

3 Hit **Create Epic**.

## Step 2: Modify start and due dates

From the Roadmap, drag the edges of the epic bar to modify the start and due dates. You can also edit these dates by clicking an epic in the Roadmap or Backlog. While setting start and due dates isn't required, we recommend you do to help with long-term planning.

The screenshot shows the Jira Roadmap interface for a project named 'New project 2'. The roadmap displays two epics: 'Epic 1' and 'Epic 2'. Epic 1 is represented by a long purple bar spanning from August 4 to November 3. Epic 2 is a shorter purple bar starting around August 1. A vertical orange line marks the current date. On the right side of the screen, a detailed view of Epic 1 is open, showing its start date as '2020/08/04' and its due date as 'August 2020'. The calendar for August 2020 is visible, with the 4th highlighted.

## Step 3: Add child issues

You can add new child issues to an epic directly from the Roadmap, Backlog, or Board within the issue details.

| WHAT'S THE DIFFERENCE BETWEEN EPICS AND OTHER