

My Dummies Guide: What does it take to Manage JIRA Projects?

Note: *This document is simply my personal dummy guide and a basic overview on principles, concepts and practices related to Atlassian Jira Software. It does not represent the teachings and concepts by Atlassian community. Please refer to the actual Atlassian website for further references. Thank You.*

**** Jira PRODUCTS ****

What is Jira SOFTWARE?

- Jira Software made by Atlassian (Australian Company) was originally designed as a Bug Tracking & Issue Tracking Tool but then became an Agile Project Management Tool as well.
- Jira is used by teams to plan, track, release and support Software Development (SLDC - Software Development Life Cycle)
- JIRA is derived from the Japanese word 'Gojira', meaning Godzilla.
- JIRA makes it easy for team members and product managers to see the big picture surrounding the development of a product.
- JIRA Software = JIRA core + JIRA Agile

What is Jira CORE?

- Jira Core = Jira only WITHOUT Jira Agile
- Jira Core is built for BUSINESS TEAMS to manage their work
- Jira Core features all the power of Jira (fine grained definition of work items and workflows, customizability, extensibility, JQL search, reporting/dashboarding etc.) This allows business teams to describe their work and processes without bumping into unfamiliar software concepts like releases or dev tool integrations.

What is Jira SERVICE DESK(IT) or SERVICE MANAGEMENT?

- Jira Service Desk is similar to an IT Helpdesk as it is the first point of contact for CUSTOMERS and EMPLOYEES
- Jira Service Desk is used for Customer Support as they can call in and reach the Helpdesk to report login issues, bugs, etc.
- Jira Service Desk is also for Employees to troubleshoot IT issues

**** Jira QUICK BASIC DEFINITIONS ****

What are Jira PROJECTs?

- A Jira Project is a COLLECTION of ALL related ISSUES that need to be completed to achieve a particular goal
- Each Jira Project contains a set of issues and can have its own custom fields, workflows, and permission schemes.

What are Jira ISSUES?

- Jira Issues are individual pieces of WORK that must be completed
- Jira Issue can represent a task, story, bug, and other work items that need tracking and managing such as helpdesk ticket, leave request form, etc.
- Jira Issues can be assigned to individuals or teams with various attributes like priority, status, and due date.

What are Jira WORKFLOWS?

- Workflow is a PATH an Issue moves into different stages from Creation to Completion.
- Workflow is a LIFECYCLE of ISSUE that carries a set of STATUSES/TRANSITIONS as an Issue moves from creation to completion.
 - Example: To Do, In Progress, In Development, Done
- Jira has Default Workflow, but it can also customize a Workflow for a specific project

What are Jira BOARDS?

- Jira BOARD is a VISUAL DISPLAY of your Issues where it MANAGES/TRACKS PROGRESS of your Issues from creation to completion

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- Jira Board displays VERTICAL COLUMNS where each Column represents a change in Status of an Issue (Ex: To Do, In Progress, Review, Done, etc.)
- Types of Jira Boards: Scrum & Kanban Board

What are Jira SPRINTS?

- Jira Sprints are time-boxed periods of work in Scrum methodology. Sprints help teams to focus on a specific set of tasks and deliverables within a fixed timeframe.

What are Jira EPICS?

- EPIC is an Issue Type in Jira which contains a LARGER BODY of WORK broken into smaller User Stories
- EPIC represents a LARGE ISSUE
- Within Epic, there can be other Issue Types such as:
 - Stories, Tasks, Bugs (Sub-Tasks)

What is Jira USER STORY?

- Stories or User Stories are shorter requirements or smaller unit of work written from the perspective of an END USER or CUSTOMER.

What are Jira VERSIONS?

- Versions TRACK Releases of a Project
 - At the end of each Sprint, you are releasing a group of features, and you can add all those features into a Version for release and tracking purposes
- Versions represent a set of Features/Fixes that are tagged together to be delivered to users
- Issues can be assigned to different Versions

What are Jira DASHBOARDS?

- Dashboard is a high level SUMMARY VIEW page displaying a collection of "gadgets", reports, status, metrics and variety of data
- Dashboard Tracks/Monitors your work on Projects
- Dashboards can be Private or Shared with other users to provide visibility into the project.

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What are Jira PERMISSIONS?

- Permissions are variety of SETTINGS within Jira that control WHAT USERS CAN SEE AND DO
- 3-Types of Permissions: Global Permissions, Project Permissions, Issue Security Permissions

What are Jira PERMISSION SCHEMES?

- PERMISSION SCHEMES are settings within Jira that allow what users can see and do within Jira Software
 - Jira Permissions are created using Permission Schemes (Ex: Project Permissions)
- Permission Schemes are created at an INDIVIDUAL Project Level

What are Jira CUSTOM FIELDS?

- Custom Fields are MANUAL fields created used GLOBALLY by the user which allows you to collect information that is very specific to your company.

What are Jira COMPONENTS?

- Jira Components are another type of CUSTOM FIELDS created at a SINGLE PROJECT LEVEL holding additional information based on user needs (Different from normal custom field feature or the default system fields)
- Users use Components when they want to AUTO-ASSIGN an issue to a SPECIFIC USER

What are Jira SCREENS?

- Jira Screens are basically an ARRANGEMENT OF FIELDS displayed on the Issue Detail Page that you can also CUSTOMIZE based on different Issue Operations such as: Create Issue, Edit Issue or View Issue
- SCREEN is basically a User's VIEW of an Issue that displays a group of fields that are available based on the Issue Type Operation

What are Jira SCREEN SCHEMES?

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- Screen Scheme allows you to choose which SCREEN will be displayed to a Jira User when they perform a particular Issue Operation (creating, editing, viewing issue)
- Once you create a Screen Scheme, it is then MAPPED to Issue Types (Bug, Epic, Story, Task, Sub-Task) via ISSUE TYPE SCREEN SCHEMES which can be associated to one or more Projects.
- User may create MULTIPLE Screen Schemes and associate them with different projects and

What are Jira ISSUE TYPE SCREEN SCHEMES?

- Issue Type Screen Scheme is associated with a Screen Scheme (which defines mappings between screens and issue operations) and allows you to MAP different Screens based on different Issue Types such as:
 - Bug, Epic, Story, Task, Sub-Task

What are Jira ISSUE TYPES?

- Issue Types are used to track different types of work items (aka Issues) within Jira Project to help you identify, categorize and report on your Team's overall Project
 - DEFAULT Issue Types: Epic, Story, Bug, Task & Sub-Task

What are Jira BOARD FILTERS?

- A Board Filter (in the form of JQL Query) is an Issue Filter that specifies which Issues are displayed on the MAIN BOARD (Scrum/Kanban)

What is Jira JQL?

- Jira Query Language (JQL) is a way to BASIC SEARCH or ADVANCE SEARCH for ISSUES within Jira Projects

What are Jira REPORTS?

- Jira REPORTS helps your team ANALYZE and VISUALIZE your progress on Projects, Versions, Epics, Sprints, and Issues
- Different Reports are designed to provide specific Insights and the overall Health, Progress and Status of your Projects

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- Ex: BurnDown Report, Epic Report, Sprint Report, Velocity Chart, Cumulative Flow, Control Chart, etc.

What are Jira ROADMAPS?

- Roadmaps/Timeline is a high-level planning view that allows you to visualize, plan, track and share work for a SINGLE PROJECT (Cannot do multiple projects)

What are Jira GLOBAL AUTOMATION RULES?

- Global Automation Rule allows you to CREATE Rule(s) that can AUTOMATE ACTIONS/TASKS across many or ALL projects based on the criteria that you set within these 3-Elements:
 - a. TRIGGERS (Kick off the rule)
 - b. CONDITIONS (Refine the rule)
 - c. ACTIONS (Perform Tasks on your site)
- Global Automation Rule removes the need to perform manual, repetitive tasks by automating a team's processes and workflows
- You can apply ONE Global Automation Rule across MULTIPLE Projects

**** Jira ADMINISTRATION ROLES ****

1. What is SITE ADMINISTRATOR Role?

- Site Administrator manages the Users, Groups and Administration Settings of the site
- Site Administrator can do the following:
 - Manage Site Settings
 - Manage & CREATE new USERS
 - Manage & CREATE GROUPS, Add/Invite Users to Groups
 - Grant Access to Products & Applications
 - Manages BILLING, SUBSCRIPTIONS, Team's Finances

2. What is JIRA ADMINISTRATOR Role?

- Jira Administrator installs, configures, and manages your Organization's INSTANCE of Jira.
- Jira Administrator can do the following:

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- Creates Custom Fields, Workflows, Schemes, Permissions, Notification, Field Configuration, etc.
- Maintains Updates, Routine Maintenance Tasks, and monitoring Performance.
- Install and Maintain Jira Apps, Integrate 3rd Party Tools, Add-ons & Plugins to enhance functionality of Jira Instance
- Manages & Configures GLOBAL Settings
- Sets Policies and SLAs for Entire Company to use with their Jira Projects
- Provide Technical Support for Projects, Issues, Queries, Reports, Workflows, JQL, Filters, Dashboards, etc.
- Provides recommendations and best practices

3. What is PROJECT ADMINISTRATOR Role?

- Project Administrator configures and maintains settings at INDIVIDUAL PROJECT LEVEL
- Project Administrators can do the following:
 - Create & Manage Components for a Project
 - Add/Remove Users to a specific Project through Project Roles
 - Customize/Owners of Projects
 - Configure Basic Project Settings (Project Details)

What is difference between JIRA ADMINISTRATOR & PROJECT ADMINISTRATOR?

- Jira Administrator is a user with the Administer Jira global permission.
- Project Administrator is a user with the Administer projects project permission for a particular project.

**** Jira OTHER ROLES ****

What are PROJECT Roles?

- Project Roles are a flexible way to associate users and/or groups with particular functions and projects.
- Project Roles are SIMILAR to Groups, with the main difference being that group membership is global whereas project role membership is project-specific.

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- Users are assigned with Project Roles which are associated to Permission Schemes to assign Permissions to users.
- MULTIPLE Users can be assigned to a SINGLE Project Role
- MULTIPLE Project Roles can be assigned to a SINGLE User
- There are 3-DEFAULT Project Roles:
 - Project Administrator
 - Developers
 - Users

What is PROJECT LEAD Field?

- Project LEAD is ONLY ONE SINGLE USER who is responsible for running or owning the Project
- Project Lead are NOT Project Administrators as they are not administering configurations of the Project
- Project Lead are typically Project Managers who are managing, planning and running the team
- SINGLE Project can ONLY have a ONE Project Lead
- Jira Administrator/Project Administrator assigns Project LEAD to a Project
- Project LEAD is a DEFAULT ASSIGNEE to a Project
- By Default, Project Lead is the Project's CREATOR
- Project LEAD can be referenced in permission schemes, notification schemes, issue security schemes, and workflows.

What is COMPONENT LEAD Field?

- Component Lead is the person responsible for part of the project defined by the component
- Jira can AUTO-ASSIGN issues to Component Leads if an Issue is created with that Component
 - Components are custom fields used to GROUP ISSUES within a project into smaller modules or sets (Example of Components: API, Backend, user interface, etc.)
- Component's Default Assignee Field will OVERRIDE the overall Project's Default Assignee Field under Project Level Settings.

What is DEFAULT ASSIGNEE Field?

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- Default Assignee Field under Project Details page allows you to auto-assign Issues to a "Project Lead" or "Unassigned" when CREATING ISSUES
- If no assignee is specified when Issue is created, Jira will automatically assign to whoever is set in the Default Assignee field.

What is BOARD ADMINISTRATOR Field?

- Board Administrator is basically an administrator of a Board (Typically it is the User who CREATED the Board)
- Board Administrators can change CONFIGURATIONS of a board (similar to Jira Administrator)
- Board Administrator can be a SINGLE USER, MULTIPLE USERS or GROUPS

What are Jira USERS?

- In Jira Software, a USER is any individual who can log into your Jira instance and counts towards your Jira License.

What are Jira GROUPS?

- GROUP refers to a COLLECTION of USERS who share the same Global Permissions.
- Groups make it easier for you to MANAGE Permissions across MULTIPLE Users at once.
- Groups are a powerful tool for organizing and managing users within a Jira instance.
- Groups can be used in MULTIPLE Projects and can be assigned to ROLES
- Groups can be associated with GLOBAL and PROJECT Permissions
- Groups are managed/created by *Site Administrators*
- Groups are typically created to GRANT Same set of PERMISSIONS based on shared characteristics.

**** TEAM vs COMPANY PROJECTS ****

What are TEAM-MANAGED Projects? (SIMPLE & QUICK)

Formerly known as Next-Gen

- Team-Managed projects are ideal for autonomous teams who want to control their own working processes and practices in a self-contained space.
- Team-Managed Projects offer SIMPLE Configuration
- DEFAULT Roles in Team Managed Projects:
 1. *Administrator*
 2. *Member*
 3. *Viewer*
- Does NOT require dedicated Jira Admin or expert.
- Team-Managed is Maintained/Created/Managed by ANY USER in Team
- Users can create a New Project Role
- By Default, ANY Licensed Users can create and maintain team-managed projects
- Team Managed Projects only have STANDARD Board Filters
- Users can only have a SINGLE board in the Team Managed Project
- Users CANNOT customize the Board Filter
- Sub-Filter and Quick Filter DO NOT exist in Team Managed Projects
- Team Managed Project configurations DO NOT impact other Projects

Which USERS have ACCESS to Team-Managed Project?

1. Project Administrator
2. Jira Software Users
3. Anyone that has access to the site
4. Jira Service Management Agents

Who uses Team-Managed Projects?

- Team Managed projects are typically for companies who are interested in Jira, and want to do it NOW, Team is very small
- Simple, Quick and Easy to get started.

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- Team Managed is perfect for companies who DO NOT have a DEDICATED Jira Administrator Onsite or a Jira Expert.
- Team Managed gives you GUARDRAILS (sort of like a bowling alley) that prevent you from going into the gutter and keep you safe in general
- Team Managed has LESS CONFIGURATIONS
- Simpler Workflows
- Permissions are either all or nothing (LOW MAINTAINENCE)
- But as your level of comfort increased in Team Managed projects, you start finding yourself limited in Team Managed projects.
- Team Managed has Issue Types & Custom Fields easier to work with

What are COMPANY-MANAGED Projects? (ADVANCED)

Formerly known as CLASSIC

- Company-Managed Projects are the best choice for teams who want to work with other teams across many projects in a standard way, such as sharing a workflow.
- Company Managed Projects offer PARALLEL SPRINTS
- Created by *JIRA ADMINISTRATORS ONLY*
- Project Creation are controlled better in Company-Managed
- Company-Managed Projects offer ADVANCED Configuration
- Company Managed Projects offer more customizations:
 - Advanced Workflows (Status, Functions, Transitions, etc.)
 - Advanced Permissions (Up-to 20 different levels of Permissions Settings)
- Users can have BOTH Kanban and Scrum Boards on the same Jira Project.
- Users can have both Team Managed and Company Projects on the SAME Company Managed Board

What are 3-ACCESS LEVELS for Team Managed Projects?

1. OPEN - Anyone with access to the site can search, view, create, or edit this project's issues.
2. LIMITED - Anyone with access to the site can search, view, and comment on this project's issues. Only people added to the project can create and edit its issues.

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3. PRIVATE - Only admins and people added to the project can search, view, create, or edit its issues.

What are DEFAULT ROLES for Team-Managed Projects?

1. ADMINISTRATOR: Admins can do most things, like update settings and add other admins to the project. They can manage features, customize issue types, and add rules on the board. Admins need product access to Jira Software to get the full benefit of this role.
2. MEMBER: Members are a part of the team. They can create issues, edit them, comment on them, move them into different statuses, and generally collaborate on your project's work. Members need product access to Jira Software to get the full benefit of this role.
3. VIEWER: Viewers can search through and view issues in your project, but not much else. You can give any registered user on your Jira site this role without extra product access.

**** Jira PROJECT ****

What is Jira PROJECT?

- A Jira Project is a COLLECTION of ALL ISSUES that need to be completed to achieve a particular goal
- All Jira projects have a "TASKS/ISSUES" that follows from Creation to Completion
 - Task/Issue is simply a piece of work
- All ISSUES can be in different state or workflow such as:
 - To Do, In-Progress, Done, Not ready for deployment, Ready for Deployment, etc.
- Jira Project can have a fixed end date or be an ongoing project.
 - It is not necessary for a Jira Project to have a Start and End date, it could include the work but no end date as well.

What is PROJECT DETAIL Page?

- Project Detail Page is a summary list of Fields with basic information and description related to the specific Project.

What are EDITABLE & NON-EDITABLE Fields on the Project Detail Page? Company - Managed Project Detail Page:

1. EDITABLE Field

- NAME: Name of the Project
- KEY: Short Abbreviation Letters of the Project (EX: "CSS1")
- URL:
- PROJECT CATEGORY: Helps larger organizations label and filter similar projects in directories
- AVATAR ICON: Visual Icon/Image identifying your Project
- DESCRIPTION: Description of the Project
- PROJECT LEAD: Usually the Project Administrator
- DEFAULT ASSIGNEE: All Issues are assigned to this person by Default
- ?? BACKGROUND COLOR: Change the background color of the Project

2. NON-EDITABLE Fields

- PROJECT TYPE: Company Managed vs Team Managed (Ex: Software)
 - Note: Users CANNOT change Project Type. To change the project type, users need to create a new project and use the 'Bulk Change' tools to move all issues into the new project.

Team - Managed Project Detail Page:

1. EDITABLE Fields

- AVATAR ICON: Visual Icon/Image identifying your Project
- NAME: Name of the Project
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 - Note: Users CANNOT change Project Type. To change the project type, users need to create a new project and use the 'Bulk Change' tools to move all issues into the new project.

What is Jira PROJECT KEY?

- Issue KEYS are UNIQUE identifiers for every piece of work you track with Jira (automatically assigned).
- Issue KEYS are made up of two parts:
 - a. **Project Key** - The letters before the dash represent the project key.
 - b. **Sequential Number** - The issue number in the project follows the dash.
- You CANNOT have two projects tied to the same issue or the SAME project key
- Export/Import a renamed project, Jira will ONLY retain the Updated Project Key
- CHANGING the Project Key requires RE-INDEXING
- Only Jira Administrator can change Project Key

What is SHARED SETTINGS CONFIGURATIONS?

- If you create a NEW Project with SHARED SETTING activated, you are sharing the "Configuration Schemes" from the CHOSEN EXISTING project.
- If a change is made to one of the projects' configurations, that change affects ALL the projects that share that configuration.
- If at a later date you make a change to ANY of those Configuration Schemes in ANY of the shared projects, those changes will APPLY to ALL PROJECTS that share the configuration. This is to keep all projects of one "type" in sync.
- NAVIGATION: Create a New Project --> Select Template --> Select Checkbox for "Share Setting with an existing Project"

What is SHARED/COPIED with the Setting?

1. Issue Types

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2. Workflows (Status)
3. Screens
4. Fields (Ex: Priority)
5. Permissions
6. Notifications

What is **NOT SHARED** / **NOT COPIED** with the Setting?

1. Components
2. Version
3. Project Role Members
4. Project Avatar
5. Project Description
6. Project URL (From Details Page)
7. Boards
8. Default Assignee
9. Project Lead
10. Project Category
11. Issue Security Scheme

Why **USERS** should use **SHARED** Jira Projects?

- All teams need the same project permissions.
- All teams need the same project workflows.
- All teams need the same reporting and metrics.
- All teams have the same roadmap.
- All teams have the same sprint planning.
- All teams contribute to the same product releases.

**** PROJECT CONFIGURATIONS ****

What is **HIDE** Project?

- A 'hidden' project will still be visible to people with admin permissions; regular users won't be able to search, view or modify any of the project's issues.

What is **ARCHIVE** Project?

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- When a Project is Archived, its issues WON'T appear in basic or advanced search results.
- You can STILL ACCESS these issues through direct links, but you won't be able to edit them.

What is TRASH Project?

- As an admin in Jira, you can get rid of projects that you don't need by moving them to trash. This won't affect associated schemes, workflows, issue types, or any content that is shared with other projects.
- Projects along with their issues, components, attachments, and versions will be available in trash for 60 days, after which they will be permanently deleted.
- When a project is in trash, its issues won't appear in basic or advanced search results. You can still access these issues through direct links, but you won't be able to edit them.

What is DELETE Project?

- To permanently delete a project, you must first move the project to trash. Once you permanently delete a project from the trash, you won't be able to recover it.
- If you think that you might need a project later, we recommend that you either archive projects or hide projects instead.

**** Jira BOARD ****

What is Jira BOARD?

- Jira Board is a 2-Dimensional TOOL that helps team plan, VISUALIZE and MANAGE Work
- Jira Board displays Issues in Columns, and each Column represents a WORKFLOW state from creation to completion:
 - To Do, In Progress, Code Review, Done
- Jira Board help VISUALIZE the work process of the Team such as:
 - Sticky Notes in Columns
 - Digital Boards
- Jira Board displays Issues as CARDS

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- Jira Boards are flexible, can be used in different ways:
 - Practice Scrum
 - Practice Kanban
 - Practice Larger projects with multiple/cross-project boards
- Jira Board is automatically created when a new project is created using Kanban/Scrum template.
- Create SINGLE BOARD can have MULTIPLE PROJECTS
- Create SINGLE PROJECT can have MULTIPLE BOARDS
 - You can have BOTH a Scrum and Kanban Board within a SINGLE Project
- Create a BOARD from EXISTING SAVED FILTER

What is Board CONFIGURATION?

- Board CONFIGURATION is a way to customize and configure specific needs on your Project within a Board (Scrum/Kanban)
- **There are 9-Configuration for a Board:**
 1. General: Board Name, Admin, Filters, SubFilter (Only for Kanban), Hide Issues (Kanban)
 2. Columns
 3. Swim Lanes
 4. Quick Filters
 5. Card Colors
 6. Card Layout
 7. Estimation (Scrum Only)
 8. Working Days
 9. Issue Detail View

What is Board RELATIONSHIP?

- A Single Project can have MULTIPLE BOARDS
 - Create Individual Board for Each Team
- A Single BOARD can display Issues from MULTIPLE PROJECTS
 - Create a Master Board to display Issues from Multiple Related Projects

What is the DIFFERENCE between Jira PROJECT & Jira BOARD?

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- A Jira project houses the collection of all issues that need to be completed to achieve a particular goal.
- A Jira board, on the other hand, is the tool used to manage those issues as they move from creation to completion.

What if Issues are MISSING on the Board?

Checkpoints to Consider:

- Check Board Filter Query Results
- Check Sub-Filter Query Results (If it is Kanban Board only)
- Check Quick Filter Query Results
- Check if any of the Fields used by those Issue are being HIDDEN (Hidden Fields used by Issues will also hide those Issues from Board)
- Check "Browse Project" Permission is missing on some Projects if multiple Projects are linked on a single Board
- Check "Issue Level Security" Permission

**** KANBAN Board ****

What is KANBAN Board?

- Smaller, lightweight Framework of Agile, evolutionary approach to Agile
- Kanban Board is great for teams who's primary objective is to manage CONTINUOUS flow of the work.
- Kanban uses visuals and columns to track work.
 - Continuous Flow
 - Features: Columns, Work In Progress (WIP) Limits
- Kanban boards are excellent for tracking an ongoing stream of tasks, such as support issues or bug fixes.
- Kanban is used for SUPPORT, UNPREDICTABLE DEVELOPMENT (Ex: Ongoing Bugs, Support, Maintenance Development, End User Problems)
- DEFAULT Columns for KANBAN Board:
 - Backlog,
 - Selected for Development,
 - In Progress,
 - Done

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- **DEFAULT Features of Kanban Board:**
 - Kanban Boards DO NOT have a SEPARATE BACKLOG view by Default. If your list of Issues is getting longer in the default Backlog column(1st column), you can activate an Actual "Kanban Backlog" view through Board Settings by dragging the Backlog column into the "Kanban Backlog" tile.

WHY & WHEN use Kanban?

- CONTINUOUS flow of work where you're constantly adding new issues
- Fix existing Bottlenecks before starting new issues
- Pull vs. Push: Pulling work empowers Teams to select their own work rather than assigning or pushing them work. Overall Kanban process is a pull-push system from one column to another.
- Used by Service, Customer Support, Helpdesk, Operations team
- Because most of the time, BUGS are difficult to ESTIMATE. So the best way to get that done is to keep the HIGHEST priority ticket at the top.

What is Kanban Work In Progress(WIP) LIMITS?

- Specify a *Minimum/Maximum* Number# of Issues ALLOWED in a specific Board column
 - Columns color turn yellow/red if issues exceed threshold

Why set Kanban WIP Limits?

- Better Flow, Limit Waste, Eliminate Bottlenecks, Overburn, Promotes Teamwork, Discourage Multi Tasking, Avoid neglecting column that may not be looked at more often

How do you DECIDE WIP Limits?

- Set none in beginning to see if process has problems
- Discourage multitasking
- Minimum on steps the team neglects

What is HIDE COMPLETED ISSUE Feature (Kanban Only)?

- Hide Completed Issues will allow users to HIDE Completed Issues OLDER than 1-week, 2-weeks, or 4-weeks.

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- Available in the Kanban Project ONLY

What are **BOARD SUB-FILTER?** (Kanban Only)

- Sub-Filter exists ONLY for Kanban Boards
- Sub-Filter further FILTERS OUT Issues further OUT OF BOARD in addition to the NORMAL Board's JQL Filter
- Sub-filters can be added to Boards to help FILTER out Issues that are OLDER than a specific TIME FRAME or that have been moved to a CERTAIN STATUS.
 - Example:
 - Add a Sub-Filter to filter out results with Issues that are either in Resolved or Close Status
 - Add a Sub-Filter to filter out results with issues that are older than 2-weeks old
 - "status = Done and Issue was changed to status Done in the last two weeks"
- By DEFAULT, Sub-Filter has following Query in Kanban Board:
 - *"((fixVersion in unreleasedVersions() OR fixVersion is EMPTY))"*
 - REMOVES Issues from the Board if they don't have the Fix Versions field in their configured screen or if it's set to hidden in the field configuration.
- If you don't have a Sub-Filter query, then the Board will return the Issue results simply from the MAIN FILTER query

**** SCRUM Board ****

What is **SCRUM Board?**

- Scrum Board is great for teams that like to work in Sprints or Time-Boxed periods when a team works to complete a set amount of work
 - Time Boxed Sprints
 - Features - Insights, Backlog, Sprint
- Scrum is used for Projects with DEFINED FEATURES
 - WHY use Scrum Board? You use this when a group of features or requirements are fully laid out and can be ESTIMATED by the development team.
- Scrum Boards are ideal for teams working in small cycles, or sprints.

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- Scrum Boards have a dedicated backlog where work can be planned and allocated to sprints,
- Scrum Boards are sometimes referred to as "Sprint Boards" or "agile boards".
- DEFAULT Columns for SCRUM Board:
 - To Do
 - In Progress
 - Done

**** CROSS PROJECT Board ****

What is Multiple/Cross Project Board?

- Cross Project Board (Multiple Project) are boards that pull issue from multiple projects. Typically used for: summary view for executives, single team working in multiple projects, security reasons for client information
- Multiple Boards (Single Project): Create a multiple board within a single company project that will only display issues that meet your specific criteria: different workstreams(development, design, features, bugs, enhancement, etc.), multiple teams on a single project

**** FILTERS ****

What are FILTERS?

- FILTERS (JQL Queries) are essentially SAVED SEARCHES for Issues based on specific criteria
- FILTERS are widely used in Jira including Boards, Dashboards, and Reports
- You can SHARE Filters

What are BOARD FILTERS?

- A Board Filter (in the form of JQL Query) is an Issue Filter that specifies which Issues are displayed on the MAIN BOARD (Scrum/Kanban)
- Board Filter is written as a JQL Query.

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- For example, your Board may include Issues from multiple projects, or from only one project, or from a particular component of a project:
- *"project = TOYOTA_CompanyManaged_Scrum and issuetype = Story ORDER BY created DESC"*

What are BOARD QUICK FILTERS?

- Quick Filters allows users to further enable MULTIPLE JQL FILTERS with a SINGLE CLICK from their Jira Board view.
- QUICK FILTERS can be further applied on TOP of your EXISTING *main JQL Board Filter*
 - If you have more than one JQL Query to apply on the Board, then you would create and use Quick Filter
- Quick Filter DOES NOT OVERWRITE your existing *main JQL Board Filter*
- Quick Filter SHORTCUTS are displayed next to the SEARCH BOX on the Board
 - You can directly select QUICK FILTERS instead of filtering manually every time.
- QUICK FILTERS are available both in Scrum/Kanban projects
- Quick Filters only display Issues that meet the Filter CRITERIA. Users can flip between filters, or stack filters to refine their search further.
- Quick Filters is a way to REFINE your Board RESULTS
- Examples of Quick Filters:
 - Issues due soon ("due <= 48h")
 - Unassigned issues ("assignee is empty")
 - Critical issues ("priority=critical")
 - Bugs ("type=bug")
 - Issues by project ("project=(projectname)")
- By DEFAULT, Board contains 2-Quick Filters:
 - 'Only My Issues'
 - 'Recently Updated':

What are BOARD SUB-FILTER? (Kanban Only)

- Sub-Filter option ONLY exists for Kanban Boards

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- Sub-Filter allows you to further FILTER OUT Issues on top of your EXISTING *Main JQL Board Filter* and applies to the Kanban Board
- Sub-Filter DOES NOT OVERWRITE your existing *Main JQL Board Filter*
- Sub-filters can be added to Boards to help FILTER out Issues that are OLDER than a specific TIME FRAME or that have been moved to a CERTAIN STATUS.
 - Example:
 - Add a Sub-Filter to filter out results with Issues that are either in Resolved or Close Status
 - Add a Sub-Filter to filter out results with issues that are older than 2-weeks old
 - "status = Done and Issue was changed to status Done in the last two weeks"
- By DEFAULT, Sub-Filter has following Query in Kanban Board:
 - "*((fixVersion in unreleasedVersions() OR fixVersion is EMPTY))*"
 - REMOVES Issues from the Board if they don't have the Fix Versions field in their configured screen or if it's set to hidden in the field configuration.
- If you don't have a Sub-Filter query, then the Board will return the Issue results simply from the MAIN FILTER query

**** BOARD SETTINGS ****

What are SWIMLANES in Board?

- Swimlanes allows you to GROUP Issues HORIZONTALLY on your Board
 - Group it by: Assignee, Issue, Project, Epic, Stories, Priority, any custom category you create, JQL Search Criteria or none
- Swimlanes allow you to break down your active sprints or projects in whatever way is most helpful to the team. They establish a customized view of the overall workflow for your team or company.

What are CARD COLORS in Board?

- COLOR CARDS enhances more VISUAL clarity to the Project Board. Colors appear as a vertical stripe on the left edge of the card.
- You can COLOR your cards based on:

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- Issue Types, Priorities, Assignees, or JQL Custom Query

What are **CARD LAYOUTS** in Board?

- Customizing CARD LAYOUTs on your board bring information to your team's attention at a QUICK GLANCE for EASY SCANNING on your physical Board

What is **ESTIMATION STATISTIC** Feature?

- Estimation Statistic feature is a way of ESTIMATING and TRACKING TIME on Issues located under Board Settings and provides you with an option to choose which type of units will be used for estimating and tracking Issues.
 - Example of Units to choose from: Story Points, Original Time Estimate, Issue Count, etc.
- Estimation Statistics allows the Team to compare how much time they originally estimated versus actual completed time
- Estimation Statistic is used for VELOCITY REPORT and often used to measure the SIZE of your backlog

What is **REMANING ESTIMATE** and **TIME SPENT** Feature?

- This Time Tracking feature is another way of ESTIMATING and TRACKING TIME on Issues located under Board Settings based on following 2-Parameters:
 1. REMAINING ESTIMATE is the current estimate of the remaining amount of time it would take to complete an Issue
 2. TIME SPENT is an aggregate amount of time spent on a particular Issue.
- Remaining Estimate and Time Spent Feature is often used for BURNDOWN REPORT to make sure that they are on track to complete the stories during the Sprint period
- By DEFAULT: This feature is always enabled in the *background* for STANDARD ISSUE TYPES
 1. However, the actual setting for this Feature under Board Configuration ONLY applies for SUB-TASKS (does NOT apply to standard Issue Types)

What is **HIDE COMPLETED ISSUE** Setting? (Kanban Only)

- Hide Completed Issues will allow users to HIDE Completed Issues OLDER than 1-week, 2-weeks, or 4-weeks.
- Hide Completed Issues is ONLY available in the Kanban Project

**** BOARD COLUMN, STATUS, WORKFLOW ****

What are Board **COLUMNS**?

- Columns describe the current **STATUS** of an Issue
- As your team's workflow matures, you may start to introduce many more statuses to your team's working process. To help organize and discuss your team's work:
 - Assign **MULTIPLE STATUSES** to a **SINGLE** column
 - Reduce the #Columns your team uses when moving cards across your board.
 - You can Add/Edit/Rearrange/Delete Columns
- **DEFAULT** Columns for **KANBAN** Board:
 - To Do,
 - In Progress,
 - Done
- **DEFAULT** Columns for **SCRUM** Board:
 - To Do,
 - In Progress,
 - Done
- **MULTIPLE STATUSES** CAN be mapped to a **SINGLE COLUMN**.
- **MULTIPLE COLUMNS** CANNOT be mapped to the **SAME STATUS**

What is **STATUS**?

- **STATUS** is when a particular Issue/Work is in a specific **STATE** of its LifeCycle (Ex: Development, In QA, Waiting for Approval, To Do, InProgress, Done)
- **STATUS** for each Issue is determined by which Column it is in

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- STATUS will differ in each Project depending upon the Project Template you choose, and how the Workflow is configured for that Project
- Ideally, you DO NOT WANT TO EXCEED more than 7-Statuses
- MULTIPLE STATUSES CAN be mapped to a SINGLE COLUMN.
- MULTIPLE COLUMNS CANNOT be mapped to the SAME STATUS
- By default, a Board's columns are mapped to the default Jira Statuses:
 - To Do <> Open, Reopened
 - In Progress <> In Progress
 - Done <> Resolved, Closed
- **DEFAULT Status Columns:**
 - Scrum Board: To Do, InProgress, Done
 - Kanban Board: Selected for Development, In Progress, Done

What is WORKFLOW?

- Workflow is a PATH an Issue takes as it moves through during its Lifecycle and typically composed of TRANSITIONS and STATUSES
- Workflow will differ in each Project, depending on which Template you're using for your business project.
- Workflow include 3-**DEFAULT** STATUSES in a Project:
 1. To Do
 2. In Progress
 3. Done
- Every Project uses Workflow
- Simplified Workflow can ONLY be used if a Board represents a SINGLE Project.
- Users CANNOT delete a Status from an ACTIVE WORKFLOW

What is TRANSITION?

- In order for an Issue to move between two Statuses, a Transition must exist. Transition is a one-way link, so if an issue needs to move back and forth between two statuses, two transitions need to be created.

What is CUSTOM Workflow?

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- By default, Jira provides the SIMPLIFIED workflow. However, if your project is more complicated then the simple statuses (To Do, In Progress & Done), then you'll need to CUSTOMIZE your workflow.
- CUSTOM Workflow is usually more complex workflow.
- Often, it has a specific sequence of steps rather than allowing every status to transition into every other status (global transitions).
- You can have CONDITIONS in the CUSTOM Workflow
- Jira Administrator can fully edit a workflow.

What happens when you DELETE a Column from Board?

- Any Jira workflow Statuses that had been mapped to the Deleted Column are moved back to the 'UNMAPPED STATUS' Column.
- If you want those UNMAPPED STATUS Issues to display on the Board, then you have to MAP it back to an existing Column.
- #Issues in the Report depends on the Board Filter and NOT the Board Column
- Jira will NOT Delete the Status from that Deleted Column

**** COMPONENTS ****

What are COMPONENTS? Project Level

- Components are another type of CUSTOM FIELDS created at a SINGLE PROJECT LEVEL holding additional information based on user needs (Different from *normal* custom field feature or the *default* system fields)
- Users use Components when they want to AUTO-ASSIGN an issue to a SPECIFIC USER
- Components CANNOT be shared GLOBALLY because it is created at a SINGLE PROJECT LEVEL ONLY
 - Unlike normal Custom Fields, Components CANNOT be used across MULTIPLE PROJECTS.
- Component can have MULTIPLE OPTIONS to select within one SINGLE CUSTOM FIELD
 - Example of Components: User Interface (UI), Database, Java, Middleware, Server, etc.

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- Components are managed by Project Administrators at a **SINGLE Project Level ONLY** (DO NOT need to be Jira administrator/Site administrator to do this)
- Components allow report tracking by GROUPING & ORGANIZING ISSUES by those Custom Fields.
- PROs & CONs of Components:
 - PRO: Just need to be a Project Administrator to create Components. Do not need to be Jira Admin or Site Admin to manage Components.
 - CONS: Components are Less Versatile & Less Flexibility compared to Fields

What are **DEFAULT ASSIGNEE** for Components?

- Component's Default Assignee will **OVERRIDE** any *Project's Overall Default Assignee* under Project Level Settings.
- Choose any of following roles to be DEFAULT ASSIGNEE under Components:
 1. Project Default - assign the issue to the same person as the project's default assignee located under project wide settings.
 2. Project Lead - assign the issue to "project's lead" located under project wide settings.
 3. Component Lead - assign the issue to "component's lead".
 4. Unassigned - if your site allows unassigned issues and someone creates an issue with this component, the issue will remain unassigned.

What is the Default Assignee on an Issue that is created w/MULTIPLE Components?

1. If multiple components + default assignee for all those components has multiple component lead names, then:
 - Jira assigns the Issue to the first created component lead in the system between all those Components.
2. If multiple component + only one of the component carries component lead names, then:
 - Jira assigns the Issue to the NEXT Component Lead name (skips the component without a component lead)

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3. If multiple component + both component carries no component lead names, then:
 - Jira assigns the Issue to the Component that carries a valid Project Lead name

What is the Default Assignee on an Issue that is created w/SINGLE Component?

1. If component has a default assignee with a component lead name, then:
 - Jira assigns the Issue to that component lead name
2. If component has no component lead name but instead has a Project Default Assignee then:
 - Jira assigns the Issue to whatever the Project Default Assignee is.

What is DIFFERENCE between COMPONENTS & CUSTOM FIELDS?

1. Components: Users should use Components when they want to auto-assign an issue to a specific user. An issue can have more than one component. Project administrators have access to manage the project component. Since project components can only belong to a Jira project, users cannot share the component globally with other Jira projects.
2. Custom Fields: Users should use custom fields if they want the field to be used globally. The custom field has a few field types that can only accept a single value. Jira administrators have global permission to manage the custom field.

**** Jira ISSUE ****

What is Jira ISSUE?

- Teams use Issue to track individual ITEMS OF WORK that must be completed
- These are all types of ISSUES in Jira:
 - Epic, Story, Task, Bug, Service, Incident, Problem, Change, etc.
- Issues help you manage code, estimate workload, and keep track of your team

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- An Issue could represent a story, a software bug, a project task, a helpdesk ticket, a leave request form or another issue type in your project.
- An issue can contain a lot of information in the custom fields:
 - name of issue,
 - unique identifier(*aka issue keys*),
 - description,
 - labels,
 - URLs and much more
- Team tracks issues in different states such as:
 - Not Ready for deployment,
 - Ready for development,
 - In progress and
 - Done.
- Every Issue in Jira is unique and belongs to JUST ONE project
(NOTE: You CANNOT have the same issue in two different projects)

What is Jira ISSUE LAYOUT Page? (aka Issue View Page)

- Issue Layout Page allows you to CUSTOMIZE Fields (add/remove/hide) within an Issue page to provide further information about the Issue
 - Ex of Custom Fields: Issue Color, Environment, Impact, Flagged, etc.
- Issue Layout Page also allows you to REORDER Fields by moving it up or down.

What are 3-SECTIONS of ISSUE LAYOUT Page? (aka Issue View Page)

1. DESCRIPTION FIELD (Section 1)
 - Fields/Information in this Section is the first place users look when they open an issue, your most important fields should be configured here.
 - Contains Most Important Information on the Issue
2. CONTEXT FIELD / DETAILS (Section 2)
 - Fields/Information in this Section appear here in the Details group tab. Each user can pin their most important context fields into the Pinned fields group depending on what works for them.

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- Contains Secondary Information on Issues
- 3. HIDE FIELD / MORE FIELDS / HIDE WHILE EMPTY (Section 3)
 - Fields/Information in this section will be hidden if they don't have a value, or will be displayed in the Context Field (aka Details) if they do.

What is an ISSUE DETAIL VIEW Page?

- Issue Detail View Page allows you to CUSTOMIZE FIELDS within the DETAIL Section of the Issue Page
- Issue Detail View Page allows you to do the following:
 1. Choose which Fields are placed in the LEFT Column
 2. RE-ARRANGE / RE-ORDER Fields by moving them up or down.
 3. Choose which Fields will be HIDDEN if their values are EMPTY
 4. Choose which Fields are ALWAYS HIDDEN from Issue view Screen

What are ISSUE OPERATIONS?

- There are 3-Types of Issue OPERATIONS:
 1. Create
 2. Edit
 3. View
- You can customize any of the three Issue Operations

**** Jira ISSUE TYPES ****

What are Jira ISSUE TYPES?

- Issue Types are used to track different types of work items (aka Issues) within Jira Project to help you identify, categorize and report on your Team's overall Project:
 - DEFAULT Issue Types: *Epic, Story, Bug, Task & Sub-Task*
- You can set the Default issue Type to be NONE
- ORDER of Issue Types can be CHANGED
- ONLY Jira Administrators can create a new Issue Type (NOT Project Administrators)
- Each Issue Type can have its own:
 - Project Workflow

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- Screen (View, Edit, Create)
- Field Configuration
- You can CUSTOMIZE a NEW Issue Type to match your business needs
 - Example: Service, Incident, Problem, Change, Claim, etc.

What are Jira EPICS?

- EPICS are a LARGER BODY OF WORK that can be broken down into SMALLER STORIES or ISSUES
- EPICS are used to GROUP a number of Issues or Stories together relating to the same large body of work.
- EPICS can span into multiple teams, multiple projects, multiple boards
- EPICS are delivered over MULTIPLE Sprints
- EPICS are a COLLECTION of USER STORIES that GROUPS them together into one valuable item.
- EPICS are strictly a JIRA Feature
- EPIC can have Issues from MULTIPLE Different PROJECTS
- EPIC's COLOR can be customize
 - Example:
 - Epic: Logging into Website
 - Story: Login with Email, Login with Social Media
 - Epic: Account Management
 - Story: Password Reset, Delete Account

What are Jira STORIES? aka User Story

- Stories or User Stories are shorter requirements or smaller unit of work written from the perspective of an END USER or CUSTOMER.
- Stories are SMALLER FEATURES within an Epic
- Stories may take ONE or MULTIPLE Sprints to be completed
- Whenever you're creating and delivering a VALUE for a customer, package that into a release, and SHIP it to a customer
- Stories generates Money or Profit to the Company (Adds Value to a Customer)
- Example: Creation of new landing pages in marketing, migration of instances in consulting.

What are Jira TASKS?

- TASKS represents the Work that needs to be done to complete a Story but Tasks itself has NO VALUE added to the Customer
- Tasks are Single To-Dos, assigned to one employee
- Tasks are something that needs to get done, but you're not making any profit or revenue (NO VALUE added to Customer)
- Tasks are BASE Issue Type
- Tasks functions part of STORY (Tasks & Story are siblings)
- Tasks are part of SPRINT
- Tasks can be CROSS-LINKED
 - You can MULTIPLE Tasks linked to a SINGLE Story
- Tasks which should not take more than 1 working day.
- While Stories define a goal or an end result, Tasks is a step in the process. Stories may consists of multiple tasks which maybe done in tandem or sequential order.

What are Jira SUB-TASKS?

- SUB-TASKS are more GRANULAR pieces of work that is required to complete a TASK, STORY or BUG.
- Sub Tasks are TECHNICAL DETAILS on how to do the work
- Sub-Task can be created for an Issue to either SPLIT the issue into SMALLER CHUNKS or to allow various aspects of an issue to be assigned to DIFFERENT people.
- Sub-Tasks are NOT considered as part of SCOPE CHANGE if Remaining Estimate and Time Spent feature is DISABLED (If enabled, it will affect the Scope Change)
- Sub-Tasks can be TRANSLATED into OTHER INSTALLED LANGUAGES (Add Translations to Sub-Tasks)
- Sub Tasks DO NOT display in the Backlog, but will DISPLAY on the Board
- Users can CONVERT Sub-Tasks to Standard Issue Types and vice versa (when you have a sub-task holding up the resolution of an issue)
 - You can BULK-CHANGE multiple Sub-Tasks into Standard Issue Types

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What **VALUES** are **INHERITED** from **PARENT** Tasks when Users **CREATE** **Sub-Tasks**?

1. Project
2. Issue Security Level
3. Sprint Value (if any)

How to add Installed Languages via **TRANSLATIONS** to a **Sub-Tasks**?

- Each Issue constant can be configured to have a **TRANSLATION** set for each available **LANGUAGE** in your Jira System Management(JSM).
- If no **TRANSLATION** has been configured for a particular language, the default issue constant name and description are displayed.

What are **BUGS**?

- Bugs are **TECHNICAL** problems that impede the progress or functionality of work.
- Bug is a specific issue related to a **DEFECT**
- Bugs are a Flaw in the software **CODE** or **FUNCTIONALITY**.
- Coding Error that requires a fix by Developers
- Code Level Problems

**** Jira FIELDS ****

What are **Jira FIELDS**?

- Jira Issues are made up of Fields
- You can choose a number of Fields to appear on the Issue Detail Page when creating, editing, or transitioning Issues.

What are **2-Types** of Fields?

1. Standard Default System Fields
2. Custom Fields

What are **STANDARD DEFAULT SYSTEM** Fields?

- Jira comes with built-in **STANDARD DEFAULT SYSTEM FIELDS** that is out of the box for any Project.
 - Ex: Name, Description, Summary, Status, Due Date, Priority, etc.

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- Default System Fields appear on the Issue Detail Page and you typically cannot customize those.
- Issues in Jira are made up of these Default System Fields that store various pieces of Information.

What are CUSTOM Fields?

- Custom Fields are MANUAL fields created used GLOBALLY by the user which allows you to collect information that is very specific to your company.
- Custom Fields are NOT *Default* System Fields
- Custom Fields can be used GLOBALLY across MULTIPLE PROJECTS
- Custom Fields are tied to ISSUE SCREENS which ultimately appear in Issue Detail Page within a Project
- Jira Administrators are allowed to create Custom Fields
- Custom Fields are More Versatile & More Flexibility
- Custom Fields are managed at the SYSTEM LEVEL across MULTIPLE PROJECTS by Jira Administrator
- Custom Field has a few field types that can only accept a SINGLE VALUE.

What are CUSTOM FIELD TYPES?

- When creating a new Custom Field, you should first set a TYPE of this Field. The TYPE indicates how your custom field will display and function, as well as what values it can accept.
 - Examples of Custom Field TYPES?
 - Checkbox, Datepicker, Labels, Number Field, Paragraph, Radio Button, Select List, Select List Multiple Choice, etc.

What are GLOBALLY SHARED FIELDS?

1. Select list (single choice),
2. Text field (single line),
3. Radio button

Fields that have more than ONE VALUE?

1. Components
2. Checkboxes

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3. Labels

Fields that can have different CONFIGURATION SCHEME CONTEXT?

1. Select list (single choice),
2. Text field (single line),
3. Radio button

What are CONFIGURATION SCHEMES for Custom Field?

- A Field Configuration Scheme maps Field Configurations to Issue Types in a project. You can use the same scheme in multiple projects.

What are Field Configuration Scheme CONTEXT?

- As #Projects grows, #of Custom Fields grows. Instead of creating a new field for each particular use case, you can configure contexts for the existing field and then reuse it as you see fit.
- A context of a custom field is a combination of projects and issue types where that field can be used. For each context, you can choose:
 1. Default Values (what is pre-filled when a custom field is displayed)
 2. Options (what users can choose from), only if the custom field type uses options

What are VERSION PICKER Field Type? (Project Level)

- Version Picker Field Type will pick Versions (other name Releases) that are defined/created within a Project under Releases. You can add versions in Releases under Project
- Version Picker exists at the PROJECT LEVEL only

What are LABELS Field Type? (Global Level)

- Labels are a custom Field Type in Jira that are in the form of TAGS or KEYWORDS that you can add to Issues to show certain characteristics on that Issue.
- While Components are Project specific, Labels are can be use across MULTIPLE Projects
- Labels are SEARCHABLE so you find Issues quicker or easily by FILTERING the particular text within a Label.

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- You can also CLICK on the Labels to jump to the Issue Navigator and see a list of ALL ISSUES related with that Label
- Labels are CASE SENSITIVE so you have to type the exact word or text if you're searching for Issues
- Labels are like a GROUPING mechanism, or defining certain attributes to a bunch of Issues.
- Example: "ready_for_UAT", "needs_review" , "marketing"

What are FACTS about LABELS?

- ANYONE can create a Label
- Labels have INCONSISTENT VALUES
- CANNOT use Labels for REPORTS
- UNRELIABLE for Searching Issues
- Labels can be used GLOBALLY
- Use "Bulk Change" tool to change Label Values

**** Jira SCREENS & SCREEN SCHEMES ****

What are SCREENS?

- SCREENS are basically an arrangement of Fields displayed on the Issue Detail Page that you can also CUSTOMIZE based on different ISSUE OPERATIONS such as:
 - Create Issue Screen
 - Edit Issue Screen
 - View Issue Screens
- SCREEN is basically a User's VIEW of an Issue
- For each Issue Type, you can customize its own Screen displaying a list of Fields on the Issue Detail Page such as:
 - Summary, Description, Due Date, Status, Assignee, Priority, etc.
- Screens allow you to :
 - Add/Remove default or custom Fields
 - Re-Order Fields
 - Make Empty Custom Fields Hidden/Visible in the Issue detail page.
- Screens are then linked to SCREEN SCHEMES

How to Access Existing Screens on a Project?

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1. Project Settings --> Summary Tab
2. Project Settings --> Issues --> Types
3. Project Settings --> Issues --> Screens

What are SCREEN SCHEMES?

- Screen Scheme allow you to choose which SCREEN will be shown based on a particular selection of ISSUE OPERATION:
 - CREATE Issue, EDIT Issue, VIEW Issue operations
- Once you create a Screen Scheme, it is then MAPPED to Issue Types (Bug, Epic, Story, Task, Sub-Task) via ISSUE TYPE SCREEN SCHEMES which can be associated to one or more Projects.
- User may create MULTIPLE Screen Schemes and associate them with different projects and
- By Default, Jira comes with 2-Different Screen Schemes to every Project:
 - Bug Screen Scheme
 - Default Screen Scheme

What are ISSUE TYPE SCREEN SCHEMES?

- *Issue Type Screen Scheme* is associated with a Screen Scheme (which defines mappings between screens and issue operations) and allows you to MAP different Screens based on different Issue Types such as:
 - Bug, Epic, Story, Task, Sub-Task
- Whenever a new Project gets created in Jira, there is a DEFAULT Issue Type Screen Scheme automatically assigned.
- Each Project has ONLY one SINGLE Issue Type Screen Scheme (Single Project CANNOT have multiple Issue Type Screen Scheme)
- Each Issue Type Screen Scheme CAN have MULTIPLE Screen Schemes (Ex: Default Screen Scheme, Bug Screen Scheme)

**** Jira PERMISSIONS ****

What are Jira PERMISSIONS?

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- Permissions are variety of SETTINGS within Jira that control WHAT USERS CAN SEE AND DO
- Permissions can be assigned:
 1. Groups
 2. Project Roles
 3. Issue Roles
- All Jira Applications allow a variety of Permissions from whether users can create new projects or see a specific type of comment on an issue.
- Only Jira Administrators can manage Permissions

What are the different TYPES of Permissions?

1. Global Permissions
2. Project Permissions
 - (Sub Types: Issue Permission, Voters & Watch Permission, Comments Permission, Time Tracking Permission)
3. Issue Security Permissions

What are GLOBAL Permissions?

- Global Permissions are SYSTEM WIDE and are granted to GROUPS of USERS.
 - Example: Browse Users, Bulk Changes, Share Dashboards, etc.
- Global Permissions apply to Issues as a WHOLE (Not Individual Projects)
- Only Jira Administrators can manage Global Permissions

What are PROJECT Permissions?

- Project Permissions apply to INDIVIDUAL Projects and are created through PERMISSION SCHEMES
 - Permission Schemes allow you to apply varying access levels to combinations of groups, roles, and individuals at the Individual Project Level
- Project Permissions can be granted to:
 - Individual Users
 - Groups
 - Project Roles
 - Issue Roles

What are **ISSUE SECURITY** Permissions?

- *Issue Security* Permissions in Jira allows you to **RESTRICT ACCESS TO ISSUES** to specific groups or individuals via Issue Security Schemes & Issue Security Levels.
- *Issue Security* Permission is helpful when you want to keep sensitive information private or only share it with specific team members.

What are **PERMISSION SCHEMES**?

- **PERMISSION SCHEMES** are settings that determine what users can see and do within Jira Software
- Project Permissions are created through Permission Schemes at **INDIVIDUAL Project Level**
- **PERMISSION SCHEMES** is a **TEMPLATE** listing all custom permissions and who gets them.
- All Permission Schemes are configured by Jira Administrators.
 - Only Jira administrators can create, edit, and apply permission schemes
- Permission Schemes can be applied to:
 - Groups
 - Users,
 - Project Roles
 - Issue Roles
- A Permission Scheme will enable/disable specific actions for users for that project.
- For example, the 'Browse Project' permission for a particular project restricts who can view the project in JIRA and thus view issues that belong to that project via the Issue Navigator.

How to **MANAGE ISSUE PERMISSIONS**?

- There are 2-Ways to Manage Issue Permissions located under Project Settings of Project:
 1. Permission Method (Macro Level)
 2. Workflow Method (Micro Level)

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How to use PERMISSION Method to manage issue permissions? (Macro Level)

- Permission Method allows you to grant the selected Permission access when it is moving from **ANY** type of STATUS (Ex: To-do, InProgress, Done, etc.)
- Applies to **ALL STATUS across the board**, less flexibility

How to use WORKFLOW Method to manage issue permissions? (Micro Level)

- Workflow Method allows you to grant the selected Permission access based on **STATUS specific (More Flexibility)**
 - Ex: If you select "Done" Status, then Transition Issue Permission will only apply to anyone who is moving issues INTO Done Status.
- Applies only when you're moving into **SPECIFIC STATUS Only**

**** Jira PROJECT PERMISSIONS ****

What are PROJECT Permissions?

- Project Permissions apply to INDIVIDUAL Projects and are created through PERMISSION SCHEMES (Permission Schemes are associated with Projects and also reside at the project level)
- Project Permissions can be granted to:
 - Individual Users
 - Groups
 - Project Roles
 - Issue Roles
- Example: who can see the project's issues, create, edit and assign them

What is ADMINISTER PROJECT Permission?

- Administer Projects permission allow users to ADMINISTER a PROJECT in Jira, which includes:
 1. Manage VERSIONS and COMPONENTS
 2. EDIT Project Role Membership, Project Components, Project Versions, and Project Details (Project Name, URL, Project Lead, Project Description)

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- Typically, grant Administer Project permission to Admins and Project Team members that are allowed to configure the project

What is BROWSE PROJECT Permission? (MINIMUM Permission)

- Allows users to VIEW/BROWSE Projects
- Allows users to VIEW Individual ISSUES in the Project
- Allows users to VIEW REPORTS
- MINIMUM Permission
- Most of the Basic Permissions are DEPENDENT on this Browse Project Permission

What is MANAGE SPRINTS Permission?

- Manage Sprint Permission allows people to create, start, and COMPLETE SPRINTS in your project. This includes adjusting the sprint duration and goal.
- If you have a SINGLE Board with MULTIPLE different Projects, then the User needs to have Manage Sprint permission in every one of those projects.
- This permission is typically assigned for Project Administrator (Jira Administrator already has this)

What is VIEW DEVELOPMENT TOOLS Permission?

- View Development Tools Permission allows users to view DEVELOPMENT-related information on the Issue, such as COMMITS, REVIEWS, and BUILD information.
- Grants users to view the DEVELOPMENT PANEL that displays 3rd Party DEVELOPMENT TOOLS like Bitbucket, GitHub, GitLab, Jenkins, etc.
- View Development Tools helps you keep track of work within Jira instead of logging separately into these 3rd party Tools

What is VIEW READ ONLY WORKFLOW Permission?

- View Read-Only Workflow permission allows users to view a read-only version of a workflow.

What is VIEW AGGREGATED DATA Permission?

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- View Aggregated Data Permission allows users to view combined and summarized project data, regardless of their individual permissions.

**** Jira ISSUE PERMISSIONS ****

What are ISSUE Permissions?

- Issue Permissions also apply to INDIVIDUAL Projects and are created through PERMISSION SCHEMES (Permission Schemes are associated with Projects and also reside at the project level)
- Issue Permissions determine WHO can perform specific ACTIONS on individual Issues such as:
 - Create/Delete/Edit/Schedule/Transition/Assign Issues, etc.

What is EDIT ISSUE Permission?

- EDIT ISSUE permission allows people to change the Summary and Description, and CHANGE the VALUE of FIELDS that aren't overridden by another permission (like the Assign issues, Modify reporters, or Schedule issues permissions).
- Edit Issue Permissions also allows people to convert issues to subtasks or vice versa.
- Edit Issue Permission allows you to move Issues out of Sprint and into Backlog or next sprint.
- You need both Edit Issue & Schedule Issue Permission to change the Issue's Due Date

What is SCHEDULE ISSUE Permission?

- Schedule Issue Permission allows people to RANK/REORDER Issues within the Board and Backlog.
- Schedule Issue Permission allows people to MODIFY the value of the DUE DATE Field on your project's issues.
- Schedule Issue Permission allows you to MOVE Issues from BACKLOG to SPRINT (vice versa)

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- You need both Edit Issue & Schedule Issue Permission to change the Issue's Due Date

What is TRANSITION ISSUE Permission? (Status Change)

- Transition Issue Permission grants users the ability to control who can TRANSITION STATUS on an Issue
- Transition Issue Permission allows you to UPDATE an Issue from ONE STATUS TO ANOTHER STATUS
- By Default:
 - Transition Issue is activated for ANY Login User
 - Note: Users have to first bypass the *Browse Project* permission to get this access
- View an Issue's underlying Workflow in the Project

What is ASSIGN ISSUE Permission? (Assign issues to other people)

- Assign Issues grants you the ability to ASSIGN Issues to OTHER PEOPLE
- Allows people to CHANGE the VALUE of the ASSIGNEE Field to another name within the Project's Issue
- It DOES NOT allow other people to assign issues to YOU rather allows you assign issues to other people (Ex: Check *Assignable User* Permission when you want Issues to be assigned to you)

What is ASSIGNABLE USER Permission? (Allow Others to assign Issues to You)

- Allows OTHER USERS to ASSIGN Issues to YOU or YOUR USERNAME
- Allows people to ASSIGN YOUR USERNAME as the Assignee field on any of the Project's Issues.

What is CREATE ISSUE Permission?

- Create Issue Permission allows users to move issues to ANOTHER Projects (Move from One Project to Another)
- Create Issue permission allows people to create issues in your project, including subtasks if you've enabled subtasks on your site.

What is MOVE ISSUE Permission? (Move to Another Project)

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- **MOVE Issues Permission** grants users to move/transfer Issues from **ONE PROJECT** to **ANOTHER PROJECT**
 - *Note that the user can only move issues to a project that they have 'CREATE Issues' permission.*
- **MOVE Issue Permission** also grants users to move/transfer Issues between **ISSUE TYPE/Workflow** within the **SAME PROJECT** if applicable. (Ex: Bug, Task, Story)

What is the reason/need to **MOVE Issue** from One Project to another?

- If you're looking to change specific Issue Type (Ex: Bug, Task, Story)

What is **RESOLVE ISSUE Permission**? Resolve and Reopen Issues + Fix Version field

- **Resolve Issue Permission** allows us to **RESOLVE** and **REOPEN** issue
- **Resolve Issue Permission** gives users the ability to set "*Fix For Version Field*" on Issues

**** Jira TIME TRACKING PERMISSIONS ****

What is **WORK ON ISSUE Permission**? Create Work Logs

- *Work On Issue* Permission allows people to **CREATE WORK LOGS**, where they can indicate the time spent and time remaining to complete the task, including a brief description of the work they did along the way.

What is **DELETE ALL WORK LOGS Permission**? Delete any Work Logs by anyone

- *Delete All Work Logs* Permission allows people to **REMOVE/DELETE ANY WORK LOGS** added by **ANYONE** on any of your project's issues.

What is **EDIT ALL WORK LOGS Permission**? Edit ANY Work Logs by ANYONE

- *Edit All Work Logs* Permission allows people to alter the time logged, time remaining, and description of **ANY WORK LOGS** entry added by **ANYONE** on **ANY** of your project's issues.

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What is DELETE OWN WORK LOGS Permission? Delete ONLY their OWN Work Logs

- *Delete Own Work Logs* Permission allows people to REMOVE ONLY their OWN TIME they logged, their OWN TIME they estimated as remaining, and the description of any work log entry THEY added to any of your project's issues.

What is EDIT OWN WORK LOGS Permission? Edit ONLY their OWN Work Logs

- *Edit Own Work Logs* Permission allows people to alter ONLY THEIR OWN time they logged, the time they estimated as remaining, and the description of any work log entry they added to any of your project's issues.

**** Jira ISSUE SECURITY PERMISSIONS ****

What are ISSUE SECURITY Permissions?

- Issue Security Permissions in Jira allows you to RESTRICT ACCESS TO ISSUES to specific groups or individuals via Issue Security Schemes & Issue Security Levels.
- Issue Security Permission is helpful when you want to keep sensitive information private or only share it with specific team members.

What are ISSUE SECURITY LEVELS?

- Issue Security Levels are created within Issue Security Schemes and let you control which User or Group of Users CAN or CANNOT view the Issue.
- You can have 1-Security Level or MULTIPLE Security Levels
- For each Level, you can define who can see the Issue
- Security Levels are also assigned within the Issue Detail Page which are linked to Security Schemes and then ultimately deciding who views what Issue.

What are ISSUE SECURITY SCHEMES?

- Issue Security Schemes allow you to Control who CAN/CANNOT view your Issues

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- Within Issue Security Schemes , you are also creating:
 - SECURITY LEVELS which are further assigned to either a single user, multiple users or groups
- Security Levels are then assigned on the Issue Detail Page so ultimately you can decide what users have access to what Issues based on Level assignments.

When do you need ISSUE SECURITY SCHEMES?

- Issue Security is perfect for situations where many people need access to a particular project, but privacy still matters. It does this by limiting which people, roles, and groups can see a particular issue

**** Jira ISSUE SECURITY PERMISSIONS ****

What are GLOBAL Permissions?

- Global Permissions are SYSTEM WIDE and are granted to GROUPS of USERS.
 - Example: Browse Users, Bulk Changes, Share Dashboards, etc.
- Global Permissions apply to Issues as a WHOLE (Not Individual Projects)
- Only Jira Administrators can manage Global Permissions

What is ADMINISTER JIRA Permission?

- Administer Jira is a Global Permission allowing you to create projects, issue types, fields, workflows, schemes for all projects.
- Users with this Permission can perform most administration tasks

What is BROWSE USERS & GROUPS Permission?

- Browse Users & Groups is a Global Permission allowing you to VIEW and SEE other Users.
- Users can see the names of other Users

What is SHARE DASHBOARD & FILTER Permission?

- Share Dashboard & Filter is a Global Permission allowing you to share dashboards and filters with other users.

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What is **MANAGE GROUP FILTER SUBSCRIPTIONS** Permission?

- This is a Global Permission allowing you to **CREATE/DELETE GROUP FILTER SUBSCRIPTIONS**

What is **MAKE BULK CHANGES** Permission?

- Make Bulk Changes is a Global Permission allow you to perform bulk changes such as edit, move, delete
- Making Bulk Changes are **RISKY**

What is **CREATE TEAM MANAGED PROJECT** Permission?

- This is a Global Permission allowing you to **CREATE NEW PROJECTS**

**** Jira **GLOBAL AUTOMATION RULES** ****

What is Jira Global **AUTOMATION RULES**?

- Global Automation Rule allows you to **CREATE** Rule(s) that can **AUTOMATE ACTIONS/TASKS** across many or **ALL** projects based on the criteria that you set within these 3-Elements:
 1. **TRIGGERS** (Kick off the rule)
 2. **CONDITIONS** (Refine the rule)
 3. **ACTIONS** (Perform Tasks on your site)
- Global Automation Rule removes the need to perform manual, repetitive tasks by automating a team's processes and workflows
- You can apply **ONE** Global Automation Rule across **MULTIPLE** Projects
- Create Rules that can do anything from auto-closing old issues to notifying specific teams when a release has been shipped
- Global Rules apply to **ALL Projects** equally
 1. It can be scary to apply Global Rule to **ALL** Projects, so its better practice to only apply to Specific Projects (refer to **SCOPE**)

What are Jira Automation **TRIGGERS**? (When to Kick off the Rule)

- *WHEN* to Kick off the Rule
- Every Rule starts with a **TRIGGER**.
- **TRIGGERS** kick off the execution of your rules.
- **TRIGGERS** will listen for events in Jira, such as when an issue is created or when a field value is changed. You can also trigger rules to run from third party services like Bitbucket or GitHub.

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- TRIGGERS can be set to run manually, based on a condition you set or scheduled.

What are Jira Automation **CONDITIONS**? (Refine the Rule/if-Else-Else)

- *If - Else If - Else* Condition is Met
- CONDITIONS allow you to narrow the scope of your rule
- CONDITIONS contain one or more rules defined by Users
- CONDITIONS must be met for your Rule to continue running.
 - For example, you can set up your rule to only escalate an issue if it is high priority.
- If a CONDITION fails, the rule will STOP running and no actions following the condition will be performed.

What are Jira Automation **ACTIONS**? (Execute Tasks/Doers)

- *THEN* Execute the Tasks
- Actions **EXECUTE TASKS** (*final step in automation*)
- Actions are the DOERS of your rule. They allow you to automate tasks and make changes within your site.
- ACTIONS are the Final Step in automating tasks, making changes within your site, and can perform many tasks, such as editing an issue, sending a notification, or creating sub-tasks.

**** Jira **VERSIONS, RELEASES, ROADMAP** ****

What are **VERSIONS**?

- VERSIONS track RELEASES of Software
 - At the end of each Sprint, you are releasing a group of features, and you can add all those features into a Version for release and tracking purposes.
- Versions represent point in time for a Project
- Issues can be assigned to different Versions (milestones)
- Release page displays the status of all Versions
- Merge Versions - Combine/Merge MULTIPLE Versions into one Version
- You Can Reschedule a Version
- Versions are available both in Scrum & Kanban Projects

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What are RELEASES?

- Releases represent point in time for your project
- Releases are used to SCHEDULE how features are rolled out to your customers
- Each release is a VERSION

Scenarios for RELEASING a Version:

- Users can release Un-Resolved Issues in a current Version
- Users can move Un-Resolved Issues to another future Version and then release current Version

What are ARCHIVED VERSIONS?

- Hide an OLD version from the Change Log reports and the Jira User Interface
- Merge Versions - You can Combine/Merge MULTIPLE Versions into one Version
- Users can UNARCHIVE, MERGE, EDIT or DELETE Archived Versions
- Versions Report DOES NOT display Archived Versions (only displays Released Versions)
- Users cannot move Issues into the Archived Versions (they need to first UNARCHIVE the Version)

What is Jira TIMELINE/ROADMAP?

- Roadmaps/Timeline is a high-level planning view that allows you to visualize, plan, track and share work for a SINGLE PROJECT (Cannot do multiple projects)
- Basic Roadmaps are designed for a SINGLE PROJECT only
- Basic Roadmap CANNOT use Board Filters that contain Issues from MULTIPLE Projects
- Roadmaps are a *QUICK and EASY WAY* to directly enter & save Epics, Stories, Tasks & Bugs (as oppose to the normal "Create" feature)
- Epic Bar Default Timeline: Weeks, Months & Quarters

**** Jira REPORTS ****

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What are Jira/Agile REPORTS?

- Jira REPORTS helps your team ANALYZE and VISUALIZE your progress on Projects, Versions, Epics, Sprints, and Issues
- Different Reports are designed to provide specific Insights and the overall Health, Progress and Status of your Projects
- Reports help review past performance to continuously improve in the future

Examples of Jira/Agile REPORTS:

1. BurnDown, BurnUp Chart
2. Epic BurnDown
3. Release BurnDown
4. Sprint Report
5. Epic Report
6. Version Report (Scrum)
7. Velocity Chart
8. Cumulative Flow Diagram (Kanban)
9. Control Chart (Kanban)

What are List of all SCRUM REPORTS?

1. BurnDown Chart
2. BurnUp Chart
3. Epic BurnDown
4. Release BurnDown
5. Sprint Report
6. Epic Report
7. Version Report
8. Velocity Chart

What are List of all KANBAN REPORTS?

1. Cumulative Flow Diagram
2. Control Chart

What Reports are available in Team Managed Projects?

1. - Burnup report
2. - Cumulative Flow diagram

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3. - Velocity report
4. - Sprint Burndown report

**** Jira BURNDOWN REPORTS ****

What is Jira BURNDOWN Chart? (Work Remaining)

- Burndown Chart shows the amount of Actual Work REMAINING TO BE DONE in a Sprint over time. (also displays ideal Estimated Work Remaining)
- Burndown Chart projects the team's likelihood of completing their work in the time available?
- NOTE: In the BURNDOWN CHART, only Story Points from PARENT Tasks are included (**DOES NOT include Story Points from SUB-TASKS**)
- Burndown Chart will display new Issues as a SCOPE CHANGE
- If the GREY LINE ('Guideline') does NOT show, *the sprint may have been started before any issues were assigned to it.*
- By Default, Remaining Estimate and Time Spent will be displayed in the Burndown Chart for STANDARD Issue Types (not for Sub-Tasks)
- Grey vertical SHADED AREA indicates NON-WORKING DAYS

What is SCOPE CHANGE?

- Scope change is when work is ADDED TO or REMOVED FROM a Project.
- Client suddenly demands extra features, or work is removed from a project to meet a deadline.

What is Jira BURNUP Chart? (Work Completed)

- BurnUp Chart shows the amount of Actual Work COMPLETED in a Sprint over time.
- NOTE: In the BURNUP CHART, only Story Points from PARENT Tasks are included (**DOES NOT include Story Points from SUB-TASKS**)

What is Jira EPIC BURNDOWN Chart?

- EPIC BURNDOWN report shows you how your team is progressing against the Total Work for an Epic
 - Epic is a Large User Story broken down into Smaller User Stories

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- Report is based on Estimation Statistic (Story Points, Issue Count, Estimates)
- See if work was added or removed during some sprint and possibly affected your team's overall progress
- Helps predict how many sprints it will take to complete the work for an Epic

What is Jira RELEASE BURNDOWN?

- Shows how the Team is progressing against the Work of a RELEASE
- Based on Estimation Statistic: User Story Points, Issue Count, Estimates
- See how quickly Team is progressing
- See if work was added or removed during some Sprint and possibly affected your team's overall progress
- Predicts how many #Sprints it will take to complete the work for a Version

*** Jira FORECAST & MANAGEMENT REPORTS ***

What is TIME TRACKING Report? Original & Current Time Estimates

- Time Tracking Report tracks ORIGINAL Time Estimates & CURRENT Time Estimates for all Issues in current Project
 - Time Estimation & Time Spent
- It helps determine whether work is on track for those issues:
 - Identify which Issues have exceeded Original Estimation
 - Identify which Issues are still On Track
 - Identify Team's progression
- Time Tracking Report can help to evaluate the challenging task by comparing the original estimates of time with the actual time logged

What is USER WORKLOAD Report?

- USER WORKLOAD Report shows the number of UNRESOLVED Issues assigned to a user across projects.
- This helps you understand the user's workload better.

What is VERSION WORKLOAD Report?

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- VERSION WORKLOAD Report shows the time estimates for all UNRESOLVED Issues assigned to a Version, broken down by user and issues.

**** Jira ISSUE ANALYSIS REPORTS ****

What is AVERAGE AGE Report? (Un-Resolved Issues)

- Average Age Report displays a GRAPH BAR CHART and a TABLE list showing the Average #Days that Issues were UNRESOLVED for on a given day over the past certain days.
- Shows the average age of UNRESOLVED issues for a project or filter. This helps you see whether your backlog is being kept up to date.

What is CREATED vs RESOLVED Issues Report? (#Created vs #Resolved issues)

- This report displays the **#CREATED Issues vs #RESOLVED Issues** over a given time-period(Daily, Weekly, Monthly, etc.)
- It helps to understand whether the overall backlog is moving towards resolution or not.

What is RECENTLY CREATED Issue Report? (Bar Chart displaying #Issues Created and how many of those Issues UnResolved)

- RECENTLY CREATED ISSUE is bar chart Report displays #Issues CREATED over a Time Period(daily, weekly, etc.) for a project and how many of those were RESOLVED.
- This helps you understand if your team is keeping up with incoming work.

What is RESOLUTION TIME Report? (Time Taken to Resolve Issues)

- Resolution Time Report displays a VERTICAL BAR GRAPH and a TABLE list showing the length of TIME(#Days) taken to RESOLVE set of Issues(#Issues) for a project/filter.
 - Time: Hourly, Daily, Weekly, Monthly, Quarterly, Yearly
- Resolution Time Report helps users identify trends and incidents which they can investigate further.

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What is **SINGLE LEVEL GROUP BY Report?** (Table of Issues grouped by Custom Field)

- *Single Level Group By Report* displays a TABLE of ISSUES grouped by a CUSTOM FIELD and FILTER.
- Displays search results in the form of a Table List
- *Single Level Group By Report* can help users GROUP Search Results by a Field and see the overall Status of each Group

What is **PIE CHART Report?** Graphical Pie Chart of Issues grouped by Custom Field

- PIE CHART Report displays a graphical pie chart of Issues for a SPECIFIC PROJECT grouped by CUSTOM FIELD and FILTER
- This helps users see the breakdown of a set of issues at a glance.

What is **TIME SINCE ISSUES Report?** (Date Field)

- Time Since Issue Report displays vertical bar chart on #ISSUES GROUPED by DATE FIELD (Ex: Created, Due Date, Resolved, Start Date, etc.) over a certain time-period (Ex: Daily, Weekly, Monthly, etc.) and project/filter
- This can help users track how many issues were created, updated, etc, over a period of time.

**** Jira STATUS REPORTS ****

What is **SPRINT Report?**

- Sprint Report shows a List of all Issues in EACH SPRINT
- It is useful for Sprint Retrospective meetings and also for mid-sprint progress checks. WHY?
 1. It helps you understand if you're Team is OVER-COMMITTING
 2. Does not understand the SCOPE well
 3. Or if the Scope is spiking up all of a sudden by adding new issues after Sprint is started
- You can quickly understand the work that has been completed and the ones that were returned to the backlog with the Sprint Reports.

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- You can clearly see how many of those tasks weren't completed and were pushed back to the backlog or reprioritized and/or sent to another active sprint.

What is EPIC Report?

- EPIC Report shows a list of complete, incomplete, and un-estimated issues in an epic.
- It is particularly useful in planning work for an epic that may extend over multiple sprints.
- EPIC report helps understand the progress towards completing an Epic over time
- Track the amount of remaining work that's INCOMPLETE or UN-ESTIMATED

What is VERSION Report?

- VERSION Report shows how your Team is progressing toward the completion of the Version.
- It also shows you the **Predicted Release Date** based on your Team's average rate of progress (velocity) since the start of the Version, and the estimated amount of work remaining.
- *VERSION Report ONLY applies to SCRUM Boards.*
- NOTE: In the VERSION REPORT, only Story Points from PARENT Tasks are included (**DOES NOT include Story Points from SUB-TASKS**)
- Versions Report EXCLUDES Sub-Tasks
- Versions Reports Displays RELEASED Versions (NOT ARCHIVED Versions)

**** Jira CONTINUOUS IMPROVE REPORTS ****

What is VELOCITY Chart? (Scrum ONLY)

- VELOCITY Chart displays a vertical bar chart on the amount of Work Committed vs. Total Actual Work Completed during a Sprint (Story Points)

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- Velocity Chart helps PREDICT FUTURE WORK Performance and how quickly Teams can work through the Backlog
 - **HOW does it PREDICT FUTURE?** Velocity is calculated by taking the AVERAGE amount of Total Work (Story Points) Completed over the last several Sprints. This calculated Velocity#(Story Points) is what can be then expected to be completed in the next Sprint.
 - **HOW does ESTIMATION get better?** This Velocity# should become more ACCURATE over time, as more data becomes available with more Sprints, the more accurate will be the forecast, and then the Team gets better at ESTIMATING their work.
- Useful for Sprint Planning to determine Scope
- Displays 7 of your most recently completed Sprints

What is CUMULATIVE FLOW DIAGRAM? Kanban ONLY

- Cumulative Flow Diagram (CFD) displays the various STATUSES of ISSUES (To Do, In Progress, Done) within a Sprint, Application or Version
- Each colored area represents the different Workflow Status (i.e. Columns)
- Cumulative Report is ONLY for Kanban Projects
- Helps identify Bottlenecks:
 - If the area is widening vertically, then that generally means there is a Bottleneck
- Cumulative Report is Board specific so it uses results from the *MAIN BOARD FILTER*

What is CONTROL Chart? (Kanban ONLY)

- CONTROL Chart shows the Cycle Time (or Lead Time) for your Product, Version, or Sprint
- Control Chart Report takes the time spent by each issue in a particular status (or statuses), and maps it over a specified period of time.
- Control Chart helps determine if Data from a Selected Timeframe can be used to PREDICT future performance (the less variance the better)
- Available in Scrum and Kanban(primarily used)

What are the Indicators for INCREASED PRODUCTIVITY?

1. Issues Dots are *BELOW* the Average Line means *INCREASING* Productivity (Why? Taking lesser #Days than the Average #Days)
 - **Increase Productivity = Issue Dots Below Average Line**
2. *DECREASING* Rolling Average Line / *DOWNTREND* Rolling Average Line means *INCREASING* Productivity (Why? taking less time(#days) to finish tasks)
 - **Increase Productivity = Downtrend Rolling Average Line**
3. *NARROWER/LESSER* Standard Deviation Shade/Predictability means *MORE* Predictable Work
 - **More Predictable Work = Narrower Standard Deviation Shade**

What are the Indicators for DECREASED PRODUCTIVITY?

1. Issues Dots are **ABOVE** the Average Line means **DECREASING** Productivity (Why? Taking more #Days than the Average #Days)
 - **Decrease Productivity = Issue Dots Above Average Line**
2. **INCREASING** Rolling Average Line / **UPTREND** Rolling Average Line means **DECREASING** Productivity (Why? taking more time(#days) to finish tasks)
 - **Increase Productivity = Uptrend Rolling Average Line**
3. **WIDENING/BIGGER** Standard Deviation Shade /Predictability means **LESS** Predictable Work
 - **Less Predictable Work = Widening Standard Deviation Shade**

**** Jira DASHBOARD ****

What is DASHBOARD?

- Dashboards are designed to display gadgets, reports, charts and graphs that help organize your projects, assignments and achievements
- Typically, Dashboards display more AGGREGATED DATA
- Dashboard is the Main Display when you log into Jira
- Create & Customize MULTIPLE Dashboards from MULTIPLE Projects (Setup view and edit rights as well)

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- Turn Dashboard into a WALLBOARD which basically projects your dashboard into a TV Monitor

What is the different between DASHBOARD <> BOARD?

- DASHBOARD is a broader place of view where you can add gadgets, reports, charts to display aggregated data.
- BOARD is a view of Issues displayed in vertical Columns for which you can update the Status of those Issues as it progresses in its cycle (To Do, In Progress, Done, etc.)

What is a WALLBOARD?

- A Wallboard is a Dashboard GADGET that essentially projects your dashboard into a TV Monitor
- Wallboard provides INSTANT VISUAL INSIGHTS into Project Progress and Team Accomplishments
- Wallboard can rotate different gadgets as a Slideshow

**** Jira JQL Queries ****

What is JQL? Jira Query Language

- Jira Query Language (JQL) is a way to BASIC SEARCH or ADVANCE SEARCH for ISSUES within Jira Projects
- JQL Query Syntax can do 2 things:
 - SEARCH Clause - Selects a Subset of Issues
 - ORDER BY Clause - Order the results
 - Example: project = PROJ order by created DESC
- JQL also uses Boolean Operators, Functions, etc. (Reference the JQL Guide)

What are JQL OPERATORS?

- An operator in JQL is one or more symbols or words, which compares the value of a field on its left with one or more values (or functions) on its right, such that only true results are retrieved by the clause. Some operators may use the NOT keyword.

What are JQL FUNCTIONS?

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- Functions are further EXTENSIONS of JQL built-in within Jira to search using one or more explicit values or JIRA fields
- Example:
 - issueFunction in epicsOf("resolution=empty and project=Mobile")
 - issueFunction in issuesInEpics("project=Mobile and status='to do'")
 - Project Specific: project = "Udemy"
 - CreatedDate < startOfDay()

**** Jira TIME DEFINITIONS ****

What is LEAD TIME?

- When an Item/Issue first initially enters into the Backlog till the time the work is Implemented, Completed and Finished.
- So, Lead Time also includes the initial time when work is just *residing in the Backlog Status for pickup*
- Backlog to Completion

What is CYCLE TIME?

- When an Item/Issue enters into the "In Progress" status which is ideally when the work is actually picked up from the Backlog and is actually starting till the time it is Implemented, Completed and Finished. (DOES NOT include the time if the Item/Issue is residing in the Backlog)
- In Progress to Completion

What is RESPONSE TIME?

- Response Time is the time when a work Item/Issue enters into the initial "Backlog" status till the time work get picked up and enters into the "In Progress" status.
- How long does it take between placing the order and actually then starting to work on the order?
- Backlog to In Progress

**** MISCELLANEOUS ****

What is Kanban Project SIDEBAR?

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- Common Features in the Project Sidebar between Kanban Team Managed & Kanban Company Managed:
 1. Source Code Management Tools
 2. Repositories Link (Bitbucket, GitHub)
 3. Confluence Integrated page
 4. Website Link Shortcut

What is COMPLETE SPRINT?

- After users click the '**Complete sprint**' button, they have **2 options**; either move the incomplete issues to a **new sprint** or move them to the **backlog**.
- When completing an active sprint with incomplete issues, you can't directly move these incomplete issues to another active sprint. You need to move these issues to the backlog first, and then you can add the issues to the active sprint.

What are PARALLEL Sprints?

- Parallel Sprints allow you to run MULTIPLE ACTIVE SPRINTS at the SAME TIME using the SAME Backlog
- Parallel Sprints are useful when your team wants to SPLIT their work to focus on DIFFERENT GOALS
- Users can ONLY Complete ONE SPRINT at a TIME
- Each Sprint can be Started and Completed INDEPENDENTLY
- Parallel Sprints can have MORE than 2-Sprints in Parallel
- Feature is enabled at the GLOBAL level, so you are enabling this for ALL Projects
- Users CANNOT have a separate Velocity Chart for each Team
- If there are Unresolved Issues in the current active Sprint and users want to complete the Sprint, users can only move them to inactive Sprint or Backlog. They cannot move them to other active Sprints.
- Example:
 - Two Teams working from the same Backlog, each Team can now work on their own Sprint.
 - One Team runs Sprint for Development, Other Team focus on a separate sprint for Design. Both sprints would contain issues

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from the same backlog, but each sprint can be started and completed independently.

What is RANKING?

- Rank your issues to organize your team's tasks more effectively.
- By ranking issues, you actually arrange issues according to their relative importance or urgency.
- For example, you have two issues that are of 'High' priority. With Jira Software ranking, you can choose which of these two issues have a higher priority or ranking than the other.
- By default, ranking is enabled on company-managed boards.

You can only rank issues if:

1. Ranking has been **enabled** (see [Enabling ranking](#)),
2. If you have the 'Schedule Issue' Permission
3. If you have 'Edit Issue' Permission

What is Ranking Sub-Tasks?

- When you rank an Issue that has Sub-Tasks, all of the sub-tasks are automatically moved with the issue.
- Sub-task issues can only be ranked in relation to their 'sibling' issues.

What happens when SCOPE Changes in middle of Project?

- Scope changes may have a larger impact than the current Sprint
- If Scope changes, we may not be able to complete other Issues we have already committed.
 - Those Issues may be part of one or more Epics, and therefore can also impact Epic Burndown
 - Those Issues may be part of a specific Version, and therefore can also impact Release Burndown

**** Jira REPORTS Quick Summary ****

Time Tracking Report (Table Report) – Table List Report displaying ORIGINAL and CURRENT TIME ESTIMATES (days or hours) for ISSUES in the current project. It uses TIME ESTIMATION & TIME SPENT.

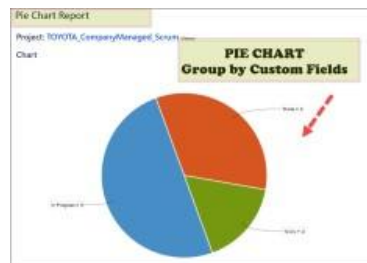


Resolution Time Report (Bar Graph) – Vertical Bar Graph Report w/table showing LENGTH of TIME taken to RESOLVE a set of issues for a project.



Average Age Report (Bar Graph) – Vertical Bar Graph Report w/table showing the AVERAGE #DAYS that issues were UNRESOLVED in a day over the past certain days.

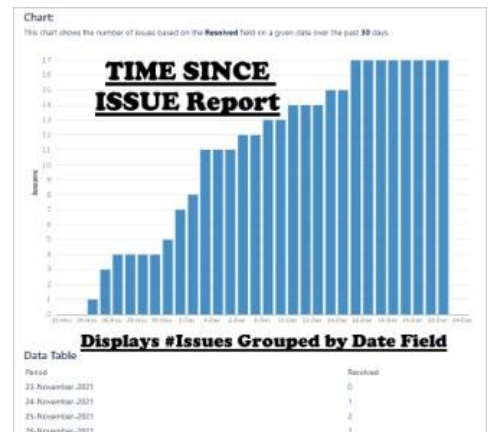
Pie Chart Report (Graphical Report)– Pie Graphical Report displaying ISSUES GROUPED by a SPECIFIC FIELD in a pie chart.



Single Level Group By Report (Table Report) – Table List Report displaying Issues GROUPED by a PARTICULAR FIELD or CUSTOM FIELD for a Filter.

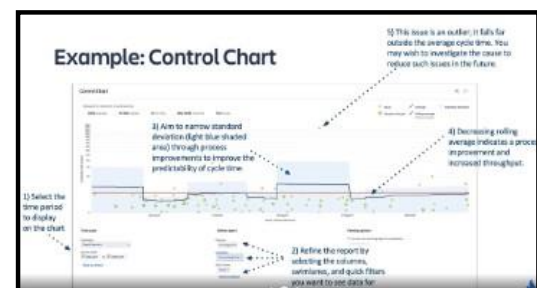


Time Since Issues Report (Bar Graph) – Vertical Bar Graph Report displaying #ISSUES GROUPED by DATE FIELD over a certain Time Period



Control Chart (Graphical Report) – Graphical Report w/dots displaying TIME spent by each ISSUE in a particular status or statuses and maps it over a period of time. Primarily used in Kanban

- Increase Productivity = Issue Dots Below Average Line
- Increase Productivity = Downtrend Rolling Average Line
- More Predictable Work = Narrower Standard Deviation Shade
- Decrease Productivity = Issue Dots Above Average Line
- Decrease Productivity = Uptrend Rolling Average Line
- Less Predictable Work = Widening Standard Deviation Shade



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