

# Step 1: Creating an Issue

Issues are the foundation of any Jira project, and they refer to any work that requires completion. A Jira issue is customizable; it represents a project task, all the user stories, software bugs, and other major features. Issues help to manage and estimate workload, all while keeping track of the team's progress.

The screenshot shows the 'Create issue' form in Jira. It includes the following elements:

- 1** Points to the 'Project' dropdown menu, which is set to 'test101'.
- 2** Points to the 'Issue type' dropdown menu, which is set to 'Story'.
- 3** Points to the 'Summary' text input field.
- 4** Points to the 'Import issues' button and the 'Show fields' / 'Find your field' dropdown menu.
- 5** Points to the 'Description' text area, which includes a rich text editor toolbar with options like 'Normal text', 'Bold', 'Italic', 'Link', 'Image', etc.

Other visible elements include the 'Components' dropdown (set to 'None'), the 'Attachment' section with a 'Drop files to attach or browse' button, the 'Reporter' field, a 'Create another issue' checkbox, and 'Cancel' and 'Create' buttons at the bottom right.

Credit: Atlassian

There are three ways to create an issue:

- Click the 'Create' button on the navigation bar at the top of the screen
- Select 'Create Issue' on the [backlog](#) (toward the bottom)
- Hit the plus sign on your board (only for projects that are team-managed)

## Step 2: Creating a Sub Task

Although this is optional, sub tasks allow you to assign and track issues on an individual basis.

Here are some reasons for creating sub tasks:

- To divide an issue into smaller tasks
- To allow for the assignment of issues to individuals
- To generate a to-do list for an issue

The screenshot shows the 'Test ticket' page for 'TestProject / TST-4633'. The ticket is of type 'Task' and has a status of 'OPEN'. The 'More' menu is open, showing options like 'Log work', 'Create Zephyr Test', 'Attach files', 'Watch ticket', 'Watchers', 'Create sub-task', 'Convert to sub-task', 'Create milestone', 'Create branch', 'Move', 'Link', 'Clone+', 'Clone++', 'Labels', and 'Delete'. The 'Create sub-task' option is highlighted with a red circle labeled '2'. A red circle labeled '1' points to the 'More' button. The 'Create sub-task' option has a tooltip that says 'Create sub-task for this ticket'.

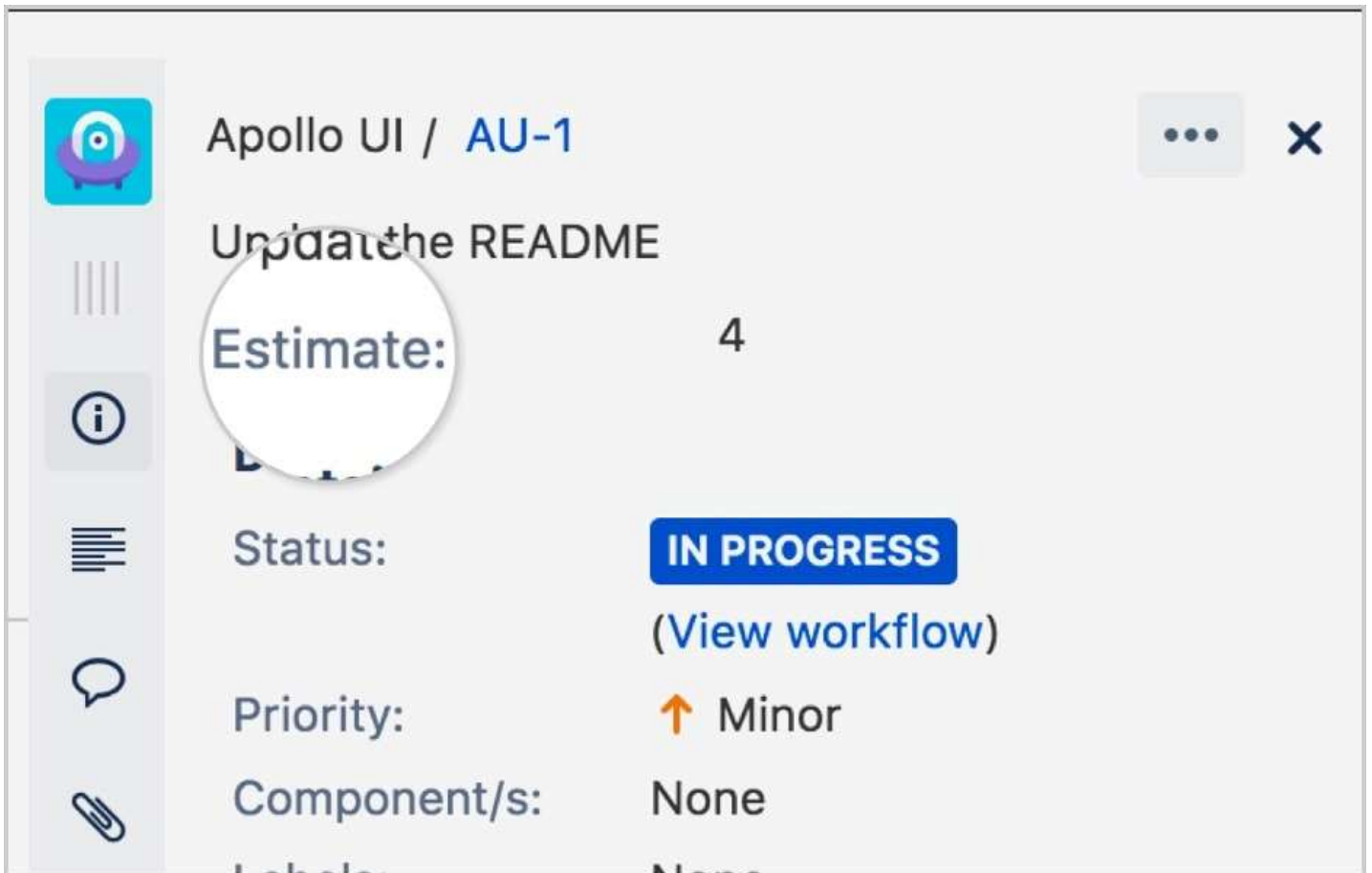
Credit: Atlassian

To create the sub task, select the particular issue, then the ellipses (⋮), and finally, 'Create Sub-task'. Outline all the details to your preference, then click 'Create'.

## Step 3: Setting Issue Estimates

In [Scrum](#), estimating issues means predicting how long certain aspects of the backlog take before completion.

The intent is to measure and achieve reliable velocity. This metric allows the teams to become consistent with their deliverables over each sprint.



Credit: Atlassian

To set an estimate, select the Jira issue and enter an estimation value at the 'Estimate' tab. Be sure to change this value before the start of a sprint. Otherwise, it shows up as a scope change on the burndown chart (a method of monitoring [sprints](#) and [epics](#)).

## Step 4: Prioritizing the Issues

In order to give the team an idea of their work in progress, you have the option to rank issues in order of priority. This is possible for both Scrum and [Kanban](#) projects.

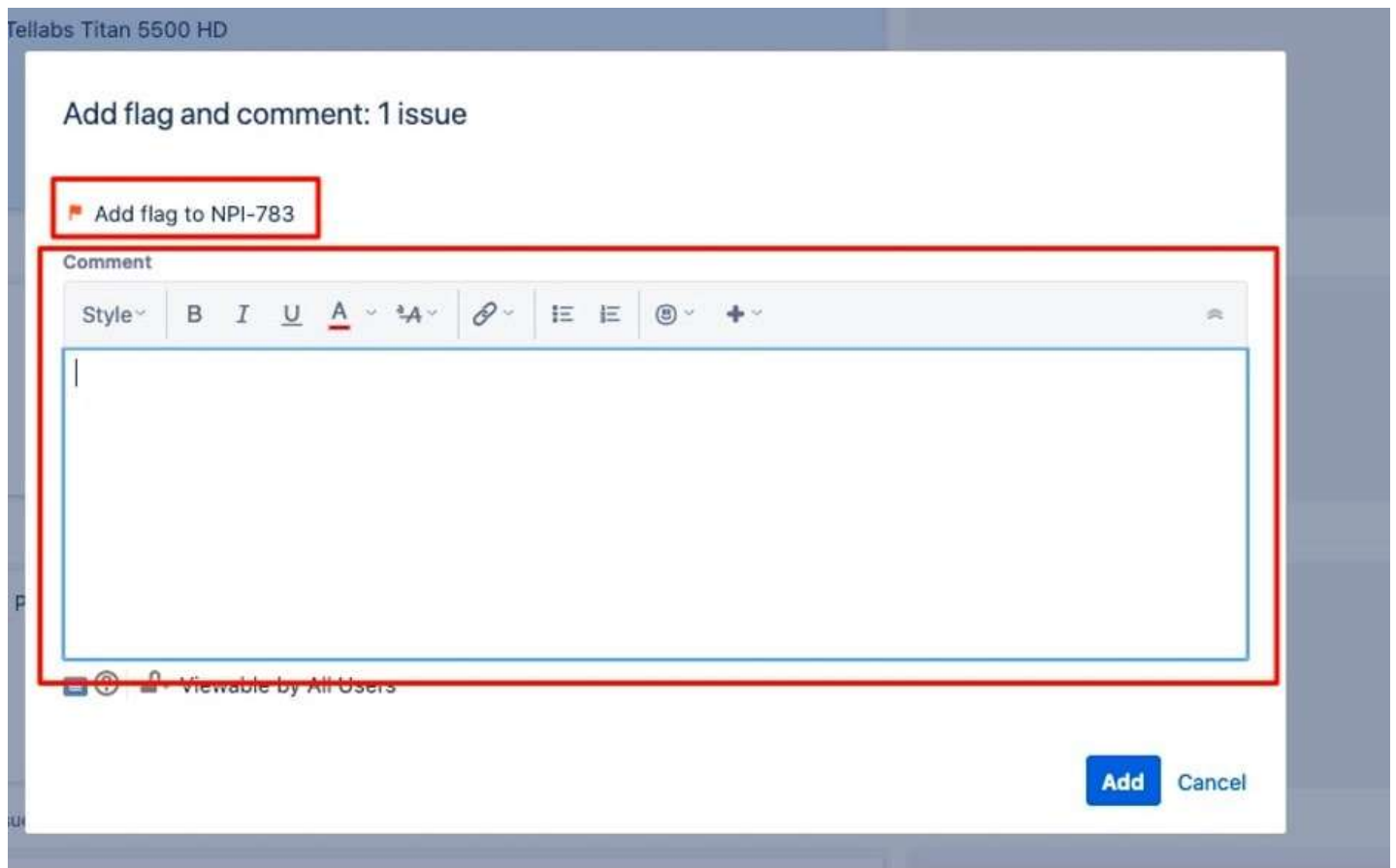
To rank your issues, go to the backlog or [board](#), then click-and-drag the issues to arrange them in the order you see fit.

Take note that making these changes requires a default permission scheme. The first is 'Schedule Issue', and the second is 'Edit Issue'.

## Step 5: Flagging Issues

You have the option to flag issues, and this means pointing out specific issues for any reason you deem necessary.

It is a useful feature because it fosters collaboration and encourages communication among team members because they indicate that someone needs help or a problem needs solving. In any case, you can add a comment to outline or explain what the flag represents.



Credit: Atlassian

To add a flag, go to your board, then right-click on the issue and select 'Add Flag'. The flag appears as a small orange icon on the bottom left of the issue.

## Step 6: Transitioning Issues

When you transition issues, it demonstrates that the workflow is progressing.

A workflow comprises statuses and transitions. While statuses detail the state of a task (for example, whether it is in progress or resolved), transitions describe how the work status changes or moves.

Take note that the workflow of the project determines whether or not you are able to transition an issue. Jira provides built-in workflows which give you the option to either incorporate them into your project as is or make modifications according to your preferences.

To transition issues, click and drag the issues from one column to another.

## Step 7: Filtering Issues

Issue filters allow you to categorize issues by hiding the ones you don't want to see and focusing on the ones that you do.

The screenshot shows the Jira Software interface. On the left, there's a 'Filters' sidebar with options like 'Search issues', 'STARRED', 'My test filter', 'OTHER', 'My open issues' (selected), 'Reported by me', 'All issues', 'Open issues', 'Done issues', 'Viewed recently', 'Created recently', 'Resolved recently', and 'Updated recently'. Below this is a 'View all filters' link.

The main area is titled 'My open issues' with a 'Save as' button. It shows a search bar with the query 'assignee = currentUser() AND resolution = Unresolved order by updated DESC'. Below the search bar, there's a list of filters under 'Order by Updated':

- SMS-1: Add app alert for changed weather events
- TS-1: this
- AUTO-1: Engage the silent drive
- SAL-2: Pet supplies r us
- SAL-5: Reticulated splines industries
- PAK-3: test2

The selected filter shows a list of issues. The first issue is 'Add app alert for changed weather events' by Smart Solar / SMS-1. The issue details are shown on the right:

- Title:** Add app alert for changed weather events
- Status:** In Progress
- Assignee:** Gil Admin
- Reporter:** DanK
- Components:** None
- Labels:** None
- Time tracking:** 4d 7h 30m logged
- Development:** Create branch
- Country and state:** Australia - QLD
- Priority:** Medium

The issue description is: 'As a user I want to know when bad weather is approaching so I can cover or protect my solar panels.' The scope/requirements are: 'Software change only', 'Third party weather tracking API', 'Does not include app alert development', and 'Provide product & app store release notes'. The environment is 'MacOS Mojave Version 10.14.6'. There are no attachments.

Credit: Atlassian

Jira offers quick filters that you can use as is, but you also have the option to customize them. Here's how to access the filter feature:

**The Search Bar:** Use this to only show issues that have certain search terms.

**Quick Filters Menu:** Here, you can access any quick filters you create. You also have the default template options to display issues according to recent updates or whether they are your assignments.

**Assignee Menu:** Use this menu to view issues assigned to any team member you select.

To customize your own quick filters on Scrum and Kanban boards, first, go to the board and click the ellipses (top right hand corner). Next, select 'Board Settings', and then the quick filters tab. Enter all necessary information, such as a name or a description, and click 'Add'.

## Step 8: Using Automation

Having a good handle on workflow is essential to the success of any project. Jira automation makes it so that you can remain up to date, manage multiple tasks, and save time during the Jira workflow.

Jira offers several options that allow you to automate any project in progress. Some of the most popular templates include:

**Smart Auto-Assign:** Automatic assignment of issues according to skill set, workload, or any other reason you prefer.

**Auto-Create a Sub Task:** After you create a Jira issue, make creating sub tasks automatic by populating certain fields.

**Clone Issues:** Duplicates an issue after it transitions.

**Change Due Date:** Automatic updating of an issue due date when it transitions to 'In Progress' status.

## Jira Issues Tutorial: Key Takeaways

Jira, being a play on the Japanese word for 'Godzilla', functions just as the name suggests. It is a colossal project management and project tracking software. The free Jira dashboard is the focal point of this Jira tutorial, as you can access every function, from how to create issues and incorporate other Jira methods such as issue tracking and issue transitions.

Creating issues by using the default issue type scheme, adding a sub task, prioritizing, and managing workflow transitions are all useful features of this Jira project management tool that, in the end, lead to the success of the Jira [agile](#) project.