

Here are five key steps to using Jira for product management:

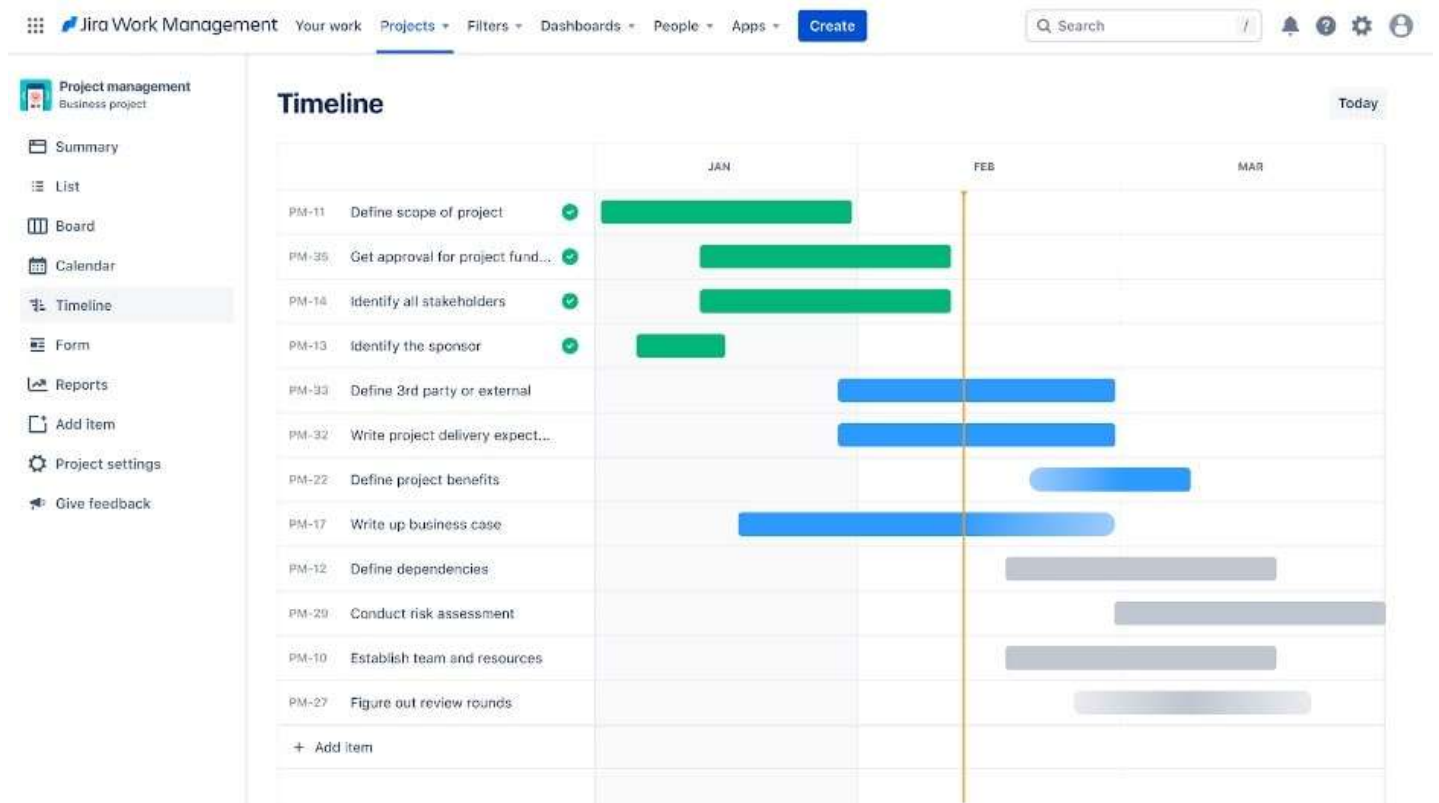
1. Set Up Templates in Jira for Project Management
2. Create Issues According to Your Project Plan
3. Use Teams and Permissions as a Project Manager
4. Track Your Projects
5. Take Advantage of Jira's Agile Project Management Methodology

Let's discuss the ins and outs of Jira's project management software so that you can make full use of the program's capabilities.

## Step 1: Set Up Templates for Jira Project Management

Jira's wide array of templates and pre-built workflows make it an adaptable tool for project management. This becomes important when selecting a template that best suits your company model.

For optimal project management, consider incorporating any tools your teams already use.



Credit: Atlassian

While this stage of setting up Jira for project management may seem like a quick first step, remember that your template is the base from which the rest of your project management work stems.

Taking the time to do this properly helps everything run smoothly, from issue creation to project completion.

Many project managers make use of Kanban boards, for example. It is ideal if you and your team know how to use Kanban project management. Once you have selected the Kanban board, which includes Kanban workflows in Jira software, you then go on to further customize its template according to your needs.

That said, you see the Backlog, Selected for Development, In Progress, and Done stages. From there, you make alterations like adding or deleting a workflow state.

In short, you need to configure your workflow in a way that best represents the way you and your team manage your projects.

If you're using Kanban boards, be sure to make full use of the backlog, and remember that you can add and remove limits for how many tasks fall under each of the workflow stages.

The Kanban board also allows you to track progress using the Control Chart, which means that you can monitor the cycle times of issues assigned and shifts in the average cycle time of your team as a whole.

Choose your template with care and be mindful of its workflow schemes and your project's requirements. Kanban boards are great for tracking efficiency and controlling the amount of work that enters the workflow from the backlog at any time.

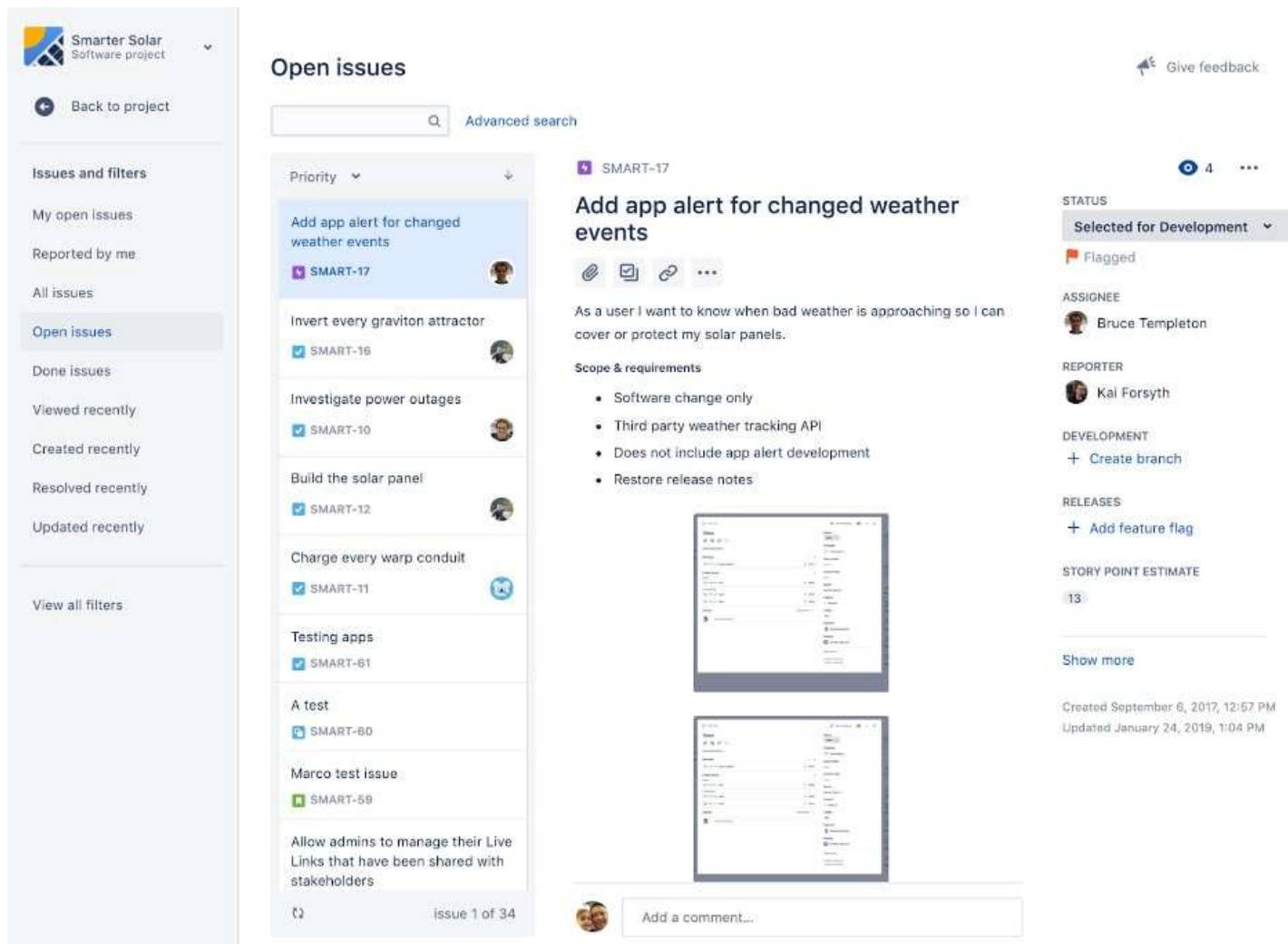
Bug tracking is especially useful for software development teams or teams with long-lasting, iterative projects. Tracking bug fixes and resolving technical issues is easy for a software development team to do using the list format of this board.

That said, the Scrum board's roadmap and backlog make it ideal for teams that work well with routine deadlines.

## Step 2: Create Issues According to Your Project Plan

Once you've got your template set up and ready to go, the next step is creating issues. To maximize the effectiveness, make use of Jira's project plan sketching tools and roadmaps as you prepare to assign your issues.

This project management hack makes maintaining control much easier for you as a Jira user.



Credit: Atlassian

When creating issues, take full advantage of their features to make communication and [team collaboration](#) a breeze. The more information you keep in one place, the less work you must do to communicate deadlines and share documents with multiple teams.

Issues do much of that work for you, while it also makes accessing information easier and more efficient for any team member.

Here are a few ways that you can add information to issues to make project management easier:

- Input due dates and flag urgent tasks
- Add a description of the task
- Attach important documents
- Include links to websites or other resources
- If a project is long and complex, consider breaking it up into smaller tasks

Once you've set up tasks, you can then choose to integrate them into a single project plan or keep them as separate projects. If you want to take a rigorous approach to your project management, don't forget that you create versions of your project plan.

Doing so allows you to consider possible influences that impact the timeline of your project, and this prepares you for almost any scenario.

## **Step 3: Use Teams and Permissions as a Project Manager**

Now, it's time to start assigning issues. You can share your projects and tasks with your entire team or with one team member at a time. Make use of Jira's permission schemes to adjust the access your team members have not only to tasks but also to Jira's settings and third-party apps.

Set up your default permissions from the get-go so you don't have to go back and make these minor adjustments halfway through a project.

**Issues**

Permission schemes

### Jira Service Management Permission Scheme for Project TEST

This Jira Service Management Permission Scheme was generated for Project TEST  
[Learn more about project permission schemes](#)

[Permission helper](#) [Grant permission](#)

**Project permissions**

Permission	Granted to		
<b>Administer Projects</b> Ability to administer a project in Jira.	<b>Project role</b> <ul style="list-style-type: none"> <li>Administrators</li> <li>atlassian-addons-project-access</li> </ul>	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>Browse Projects</b> Ability to browse projects and the issues within them.	<b>Project role</b> <ul style="list-style-type: none"> <li>Administrators</li> <li>atlassian-addons-project-access</li> <li>Service Desk Team</li> </ul> <b>Application access</b> <ul style="list-style-type: none"> <li>Jira Service Desk</li> </ul> <b>Service project customer - portal access</b>	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>Manage sprints</b> Ability to manage sprints.	<b>Project role</b> <ul style="list-style-type: none"> <li>atlassian-addons-project-access</li> </ul>	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>Service Project Agent</b> Allows users to interact with customers and access Jira Service Management features of a project.	<b>Project role</b> <ul style="list-style-type: none"> <li>Administrators</li> <li>atlassian-addons-project-access</li> <li>Service Desk Team</li> </ul>	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>View aggregated data</b> <span>NEW</span> Users with this permission will have access to view combined and summarized project data, regardless of their individual permissions. <a href="#">Learn more.</a>	<b>Project role</b> <ul style="list-style-type: none"> <li>atlassian-addons-project-access</li> </ul>	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>View Development Tools</b> Allows users in a software project to view development-related information on the issue, such as commits, reviews and build information.	<b>Project role</b> <ul style="list-style-type: none"> <li>Administrators</li> <li>atlassian-addons-project-access</li> </ul>	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>View Read-Only Workflow</b>	<b>Project role</b>	<a href="#">Edit</a>	<a href="#">Remove</a>

Credit: Atlassian

When it comes to task management, it is important to ensure that you don't overload team members with too many tasks or projects at once, especially when you're managing multiple projects at the same time.

Remember to use Jira's monitor team capacity feature, which helps you distribute work.

## Step 4: Tracking Your Projects

Project tracking is the largest part of project management. Prioritizing certain aspects will depend on what your needs are as a project manager. This can include tracking team performance, the time tasks take to complete, and the proximity of deadlines. Jira software highlights this information depending on your settings and choice of template.

Whatever the case may be, Jira gives you insights into the efficiency of your team members and what tasks you need to prioritize.

The screenshot displays the Jira Work Management interface. At the top, there's a navigation bar with 'Jira Work Management', 'Your work', and tabs for 'Projects', 'Filters', 'Dashboards', 'People', and 'Apps'. A 'Create' button is on the right. Below this, a search bar and notification icons are visible. On the left sidebar, under 'Task tracking', the 'List' view is selected. The main area shows a table of tasks for a 'Business project'.

Type	Key	Summary	Status	Assignee	Due date	Priority
✓	TASK-1	Create pitch deck	TO DO	Alana Song	2021-11-14	Highest
✓	TASK-8	Finish up review and feedback gathering	TO DO	Alana Song	2021-01-05	Medium
✓	TASK-9	Competitive analysis	IN PROGRESS	Alana Song	2021-06-25	Low
✓	TASK-7	Gather information for website	IN PROGRESS	Alana Song	2021-07-28	Low
✓	TASK-10	Source and create images	IN PROGRESS	Alana Song	2021-03-03	Medium
✓	TASK-15	Submit creative brief	DONE	Alana Song	2021-09-13	Low
✓	TASK-17	Audit current experience	DONE	Alana Song	2021-06-01	Low

Below the table is a '+ Add item' button. The left sidebar also includes options like Summary, Board, Calendar, Timeline, Form, Reports, Add item, Project settings, and Give feedback.

Credit: Atlassian

Some popular plugins that can be helpful when managing projects include:

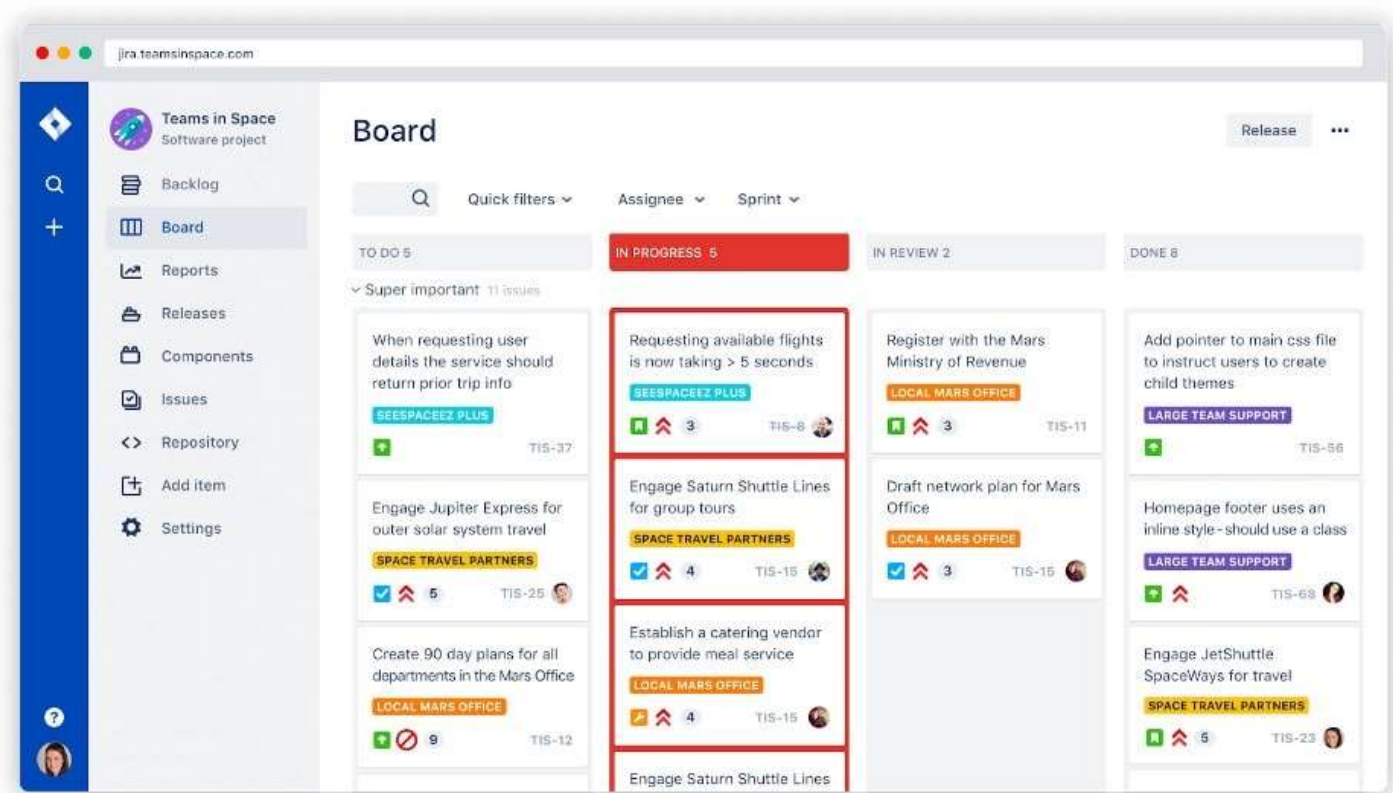
- Structure – Suitable for both agile project management as well as more traditional project management methods. Structure brings all information across Jira together in one place.
- Gantt Charts – This plugin is also a comprehensive visualization tool, and its features include a risk matrix and a resources module.
- Tempo Planner – If resource management visualization sounds appealing, a plugin like Tempo can offer a clear sense of all team members' workloads and capacities.

Between the visualization and agile tools of Jira software, you can simplify the project stage monitoring. Once you have a set of completed tasks and project completion, you can send them to the archived projects section. Once there, you have the option to view and edit your project.

## Step 5: Take Advantage of Jira's Agile Project Management Methodology

Jira is an agile project management tool that supports a variety of agile project management tools, including Scrum, Kanban, and mixed methodologies. Jira allows you to customize workflows in ways that work for you and your teams.

You can adapt default workflows, enabling you to bring the agile methodology forefront of your project management process. The option to connect workflows to projects is also an option.



Credit: Atlassian

User stories, a key feature of agile methodologies, make Jira users the foregrounded feature of team engagement, tracking, and communication. User stories clarify the customer value of project activities, and they dovetail well with teams that practice agile project management.

Jira is well known for its Scrum support; it accommodates Scrum's scaled agile framework, including sprint planning, standups, sprints, retrospectives, and scrum teams.

To create an even more custom workflow, you can choose whether you want to use fixed-length sprints or future sprints, turning on and off agile features as you see fit.

Any practiced project manager knows that flexibility is key when it comes to taking control of project tasks and workflows. With Jira software, project managers are not bound to traditional project management software parameters.

Managing projects with Jira workflows, from project creation to completion, is a customizable process that can work for technical teams, software teams, and agile teams alike.