JIRA

SummitWorks™
GLOBAL SOLUTION ARCHITECTS

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Introduction to JIRA

Introduction to JIRA

What is JIRA?

JIRA is an **Incident Management Tool** used for Project Management, Bug Tracking, Issue Tracking and Workflow.
JIRA is based on the following three concepts:

- Project
- Issue
- Workflow

Introduction to JIRA

What is JIRA project?

- A Jira project is a collection of issues. Your team could use a Jira project to coordinate the development of a product, track a project, manage a help desk, and more, depending on your requirements. A Jira project can also be configured and customized to suit the needs of you and your team.

What is an issue?

- Different organizations use Jira to track different kinds of issues, which can represent anything from a software bug, to a project task, or a leave request form.

- Issues are the building blocks of any Jira project. An issue could represent a story, a bug, a task, or another issue type in your project.

Introduction to JIRA

What is a workflow?

In JIRA a workflow is a record of statuses and transitions of an issue during its lifecycle. A status represents the stage of an issue at a particular point. An issue can be in only one status at a given point of time like Opened, To Do, Done, Closed, Assigned, etc.

A transition is a link between two statuses when an issue moves from one status to another. For an issue to move between two statuses, a transition must exist. In a simple way, a transition is some kind of work done on the issue, while status is the impact of work on that issue.

Example

As of now, an issue is created and opened. When the assignee starts working on the issue, the issue moves to the **In Progress status**. Here, the transition is starting the work, while the status of the issue is now progressive.

Introduction to JIRA

Workflow stages

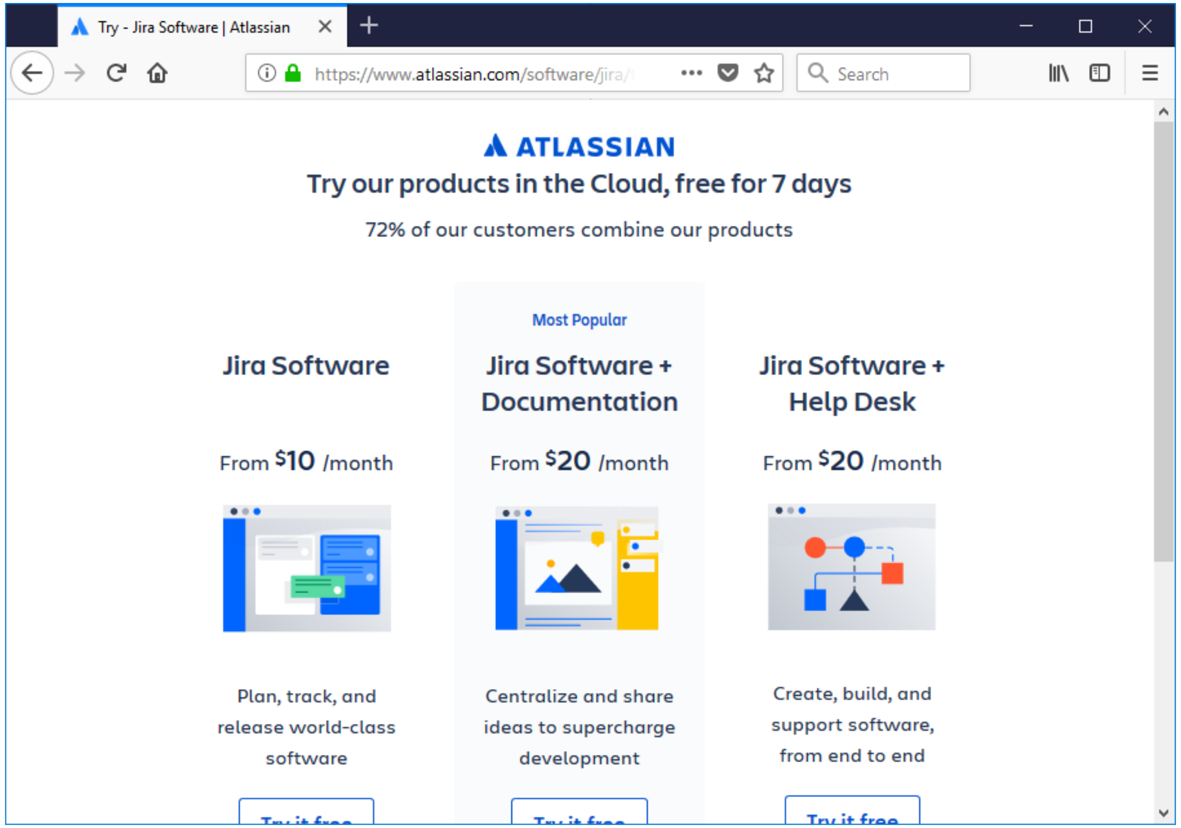
JIRA workflow has the following stages to track as soon as an issue is created:

- **Open Issue**: After creation, the issue is open and can be assigned to the assignee to start working on it.
- **In Progress Issue**: The assignee has actively started to work on the issue.
- **Resolved Issue**: All sub-tasks and works of that Issue are completed. Now, the issue is waiting to be verified by the reporter. If verification is successful, it will be closed or re-opened, if any further changes are required.
- **Reopened Issue**: This issue was resolved previously, but the resolution was either incorrect or missed a few things or some modifications are required. From Reopened stage, issues are marked either as assigned or resolved.
- **Close Issue**: The issue is considered as finished, resolution is correct as of now. Closed issues can be re-opened later based on the requirement.

JIRA - Free Trials Setup

JIRA provides 7 days to 1-month free trials of basic features. JIRA has other plans as well with different advanced features and add-ins. The cost depends on the number of users.

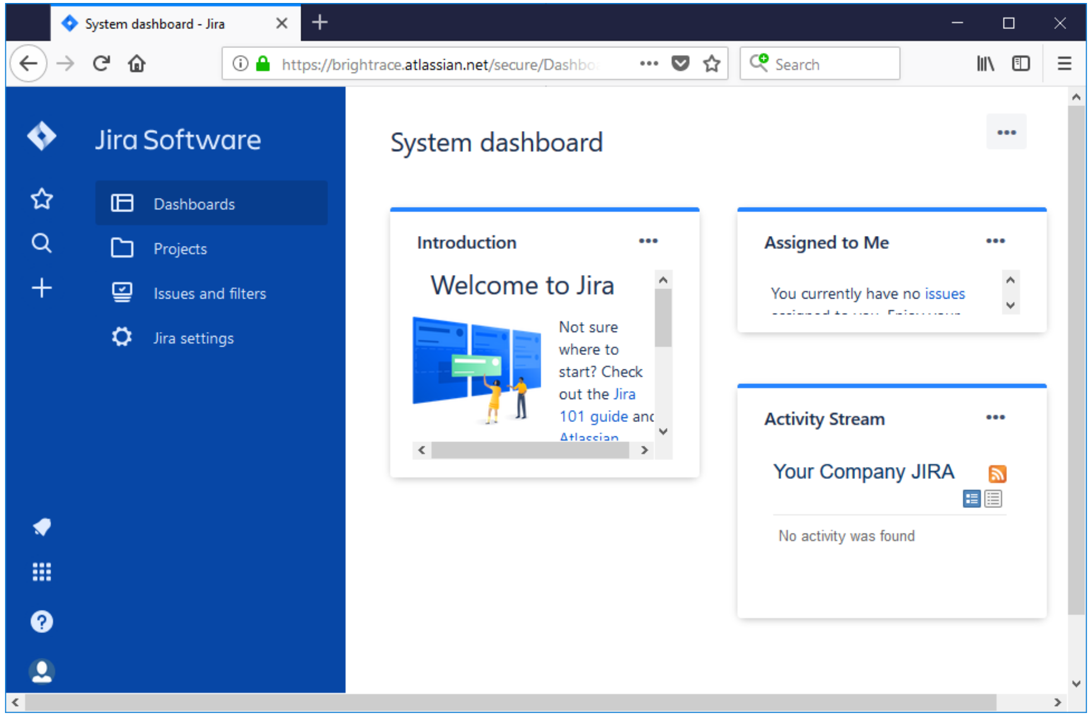
By visiting https://www.atlassian.com/software/jira/try, a user can see different available plans for trying purposes.



Dashboard

Dashboard

After logging into JIRA, the Dashboard is the first page that shows up. The Dashboard is customized by the Admin. Based on the roles, the admin can set the access of JIRA.



Important Points of the Dashboard

- The navigation bar, present at the left of the JIRA page, will be the same across all the pages/screens of JIRA. Dashboard, Projects, Issues, Boards and Create are the main links. These links have many sub-links to navigate other functionalities.
- Navigation bar contains links that provides a quick access to the most useful functions of JIRA.
- Just next to navigation bar, there is a System Dashboard.
- The information provided in the system dashboard area can be customized by the Admin.
- By default, it has three main sections – **Introduction, Assigned to Me** (displays Issues list assigned to users) and **Activity Stream**(Activities done by the users).

Issue Types

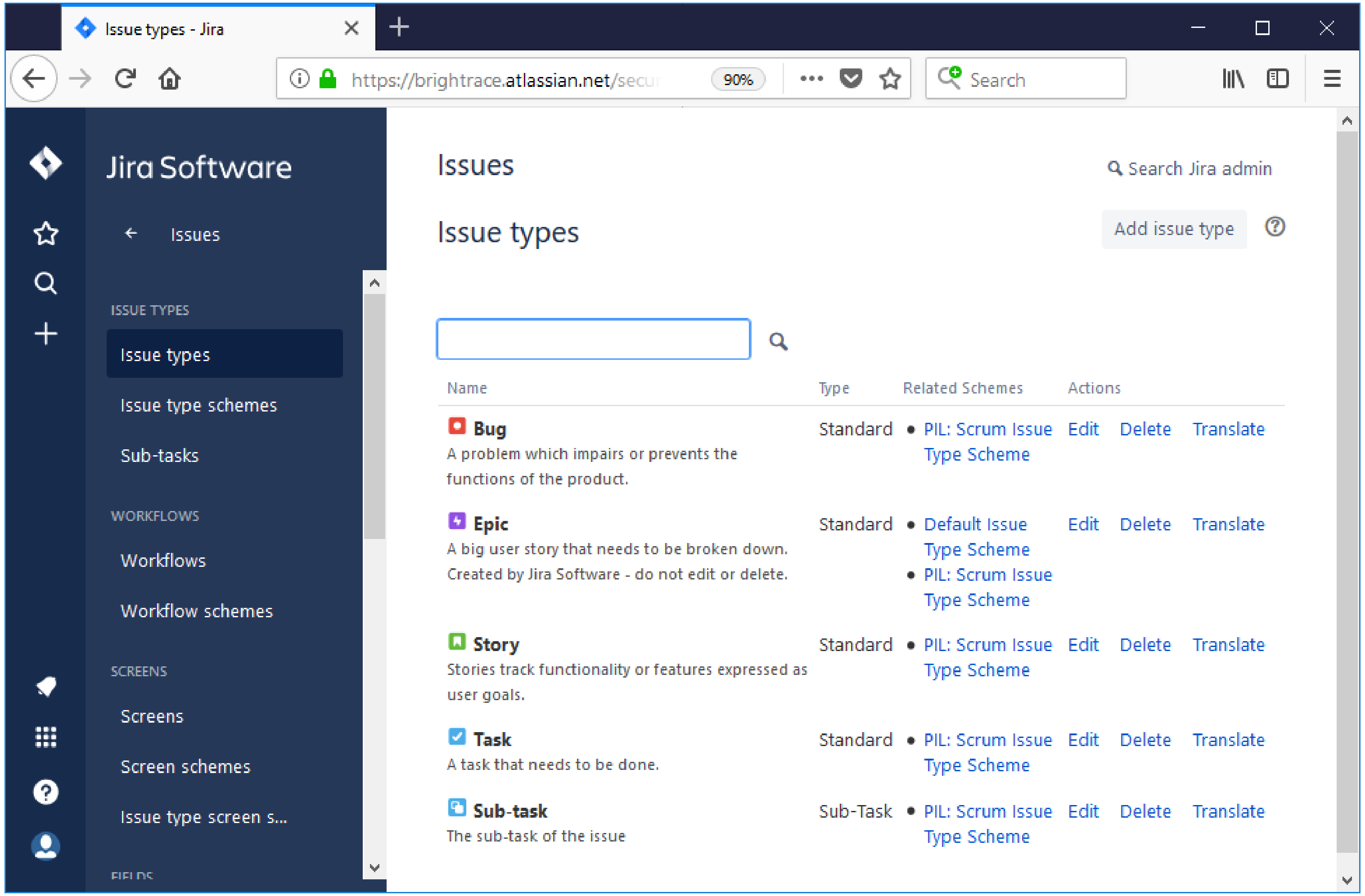
Since JIRA tracks all the tasks, the sub-tasks or even a work as an Issue, there are several types of Issues to identify the work and categorize the similar issues.

An Issue is classified as follows:

- **Sub-Task**: This is the sub-task of an issue. In a logged issue, there can be different tasks to resolve it, which are called as sub-tasks.
- **Bug**: A problem that impairs or prevents the functions of the product.
- **Epic**: Are large bodies of work that can be broken down into a number of smaller tasks
- **Story**: Also called "user stories" are short requirements or requests written from the perspective of an end user.
- **Task**: A task that needs to be done to achieve team's goal.

Issue Types

Issue types in JIRA.



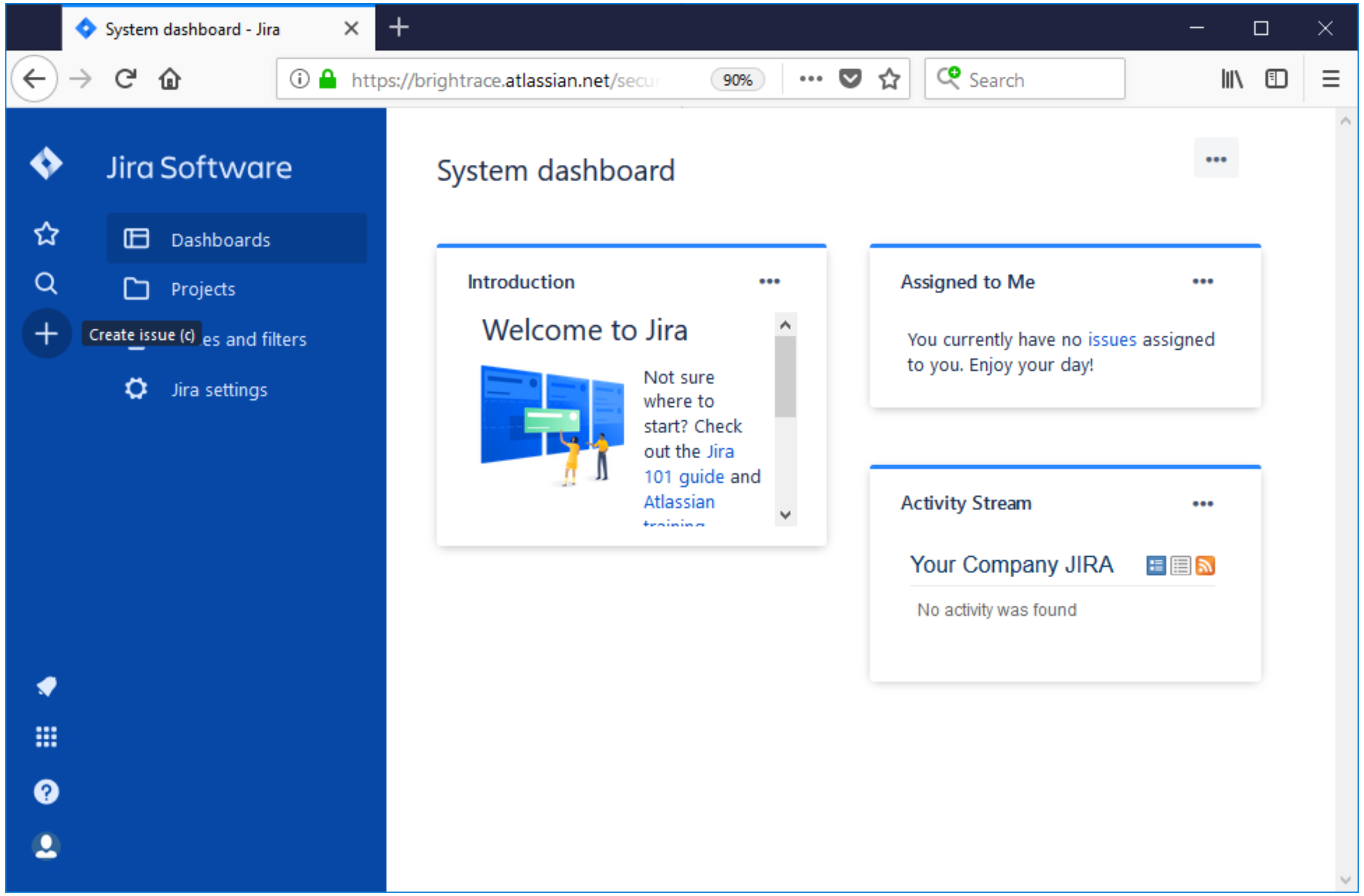
Create/Clone an Issue

Create an Issue

To create an issue in JIRA, the user should have Create Issue permission in the project. Admin can add/remove the permission.

Steps to Follow

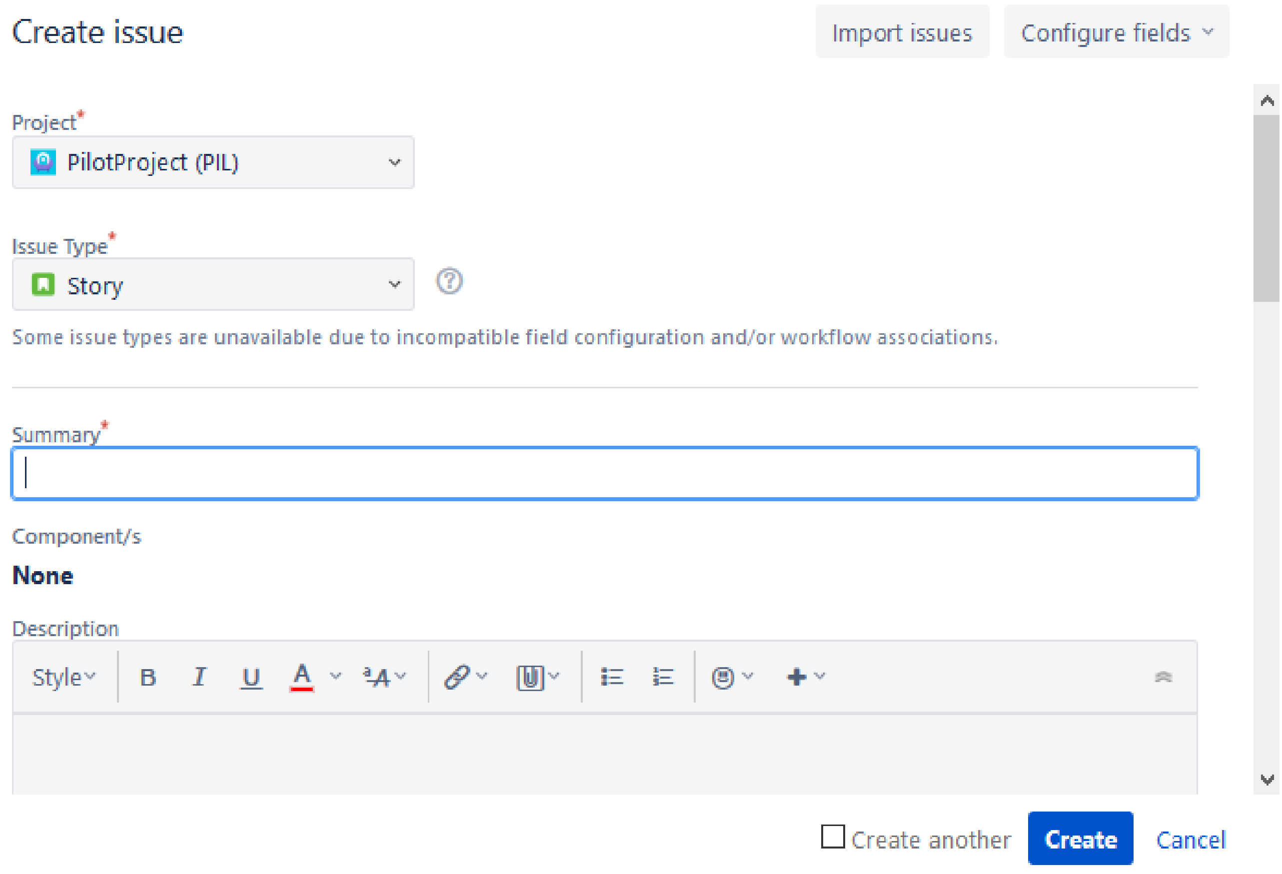
- Click on the Create button in the navigation bar to open the create issue dialogue box.



Create an Issue

To complete the process of creating an issue, we should follow the pointers given below.

- Select the Project where the issue is.
- Select the type of issue, whether it is a bug/story/task, etc.
- Write a one-line summary to provide the overall idea about the issue.
- Write the details of the issue in the **Description** field. Explain the issue, so that stockholders can understand every detail of the issue.
- To create a similar type of issue in the same project and issue type, check the checkbox of “Create another” otherwise keep it as unchecked.
- After entering all the details, click on the Create button.



Create an Issue

Fields in the Create Issue form

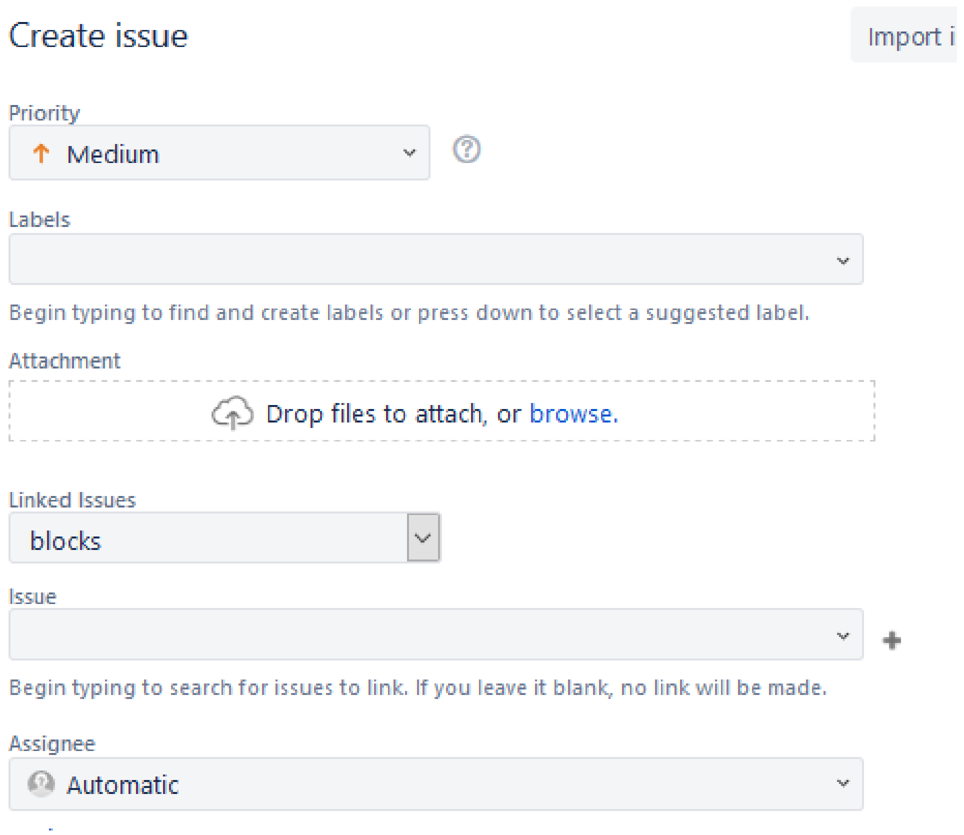
Priority: Issue creator can set the priority to resolve the issue as High, Medium, Low, and Lowest.

Labels: It is similar to **Tag;** it helps in filtering out specific types of issues.

Linked Issue: It links other issues that are either dependent on this issue or this issue is dependent on them. Options in dropdowns are – block, is blocked by, duplicate, clone, etc.

Issue: User can link the issue by the **Typing ID** or summary of those that are related to the linked issue field.

Assignee: The person who is responsible to fix this issue. Assignee name can be entered by the issue creator.

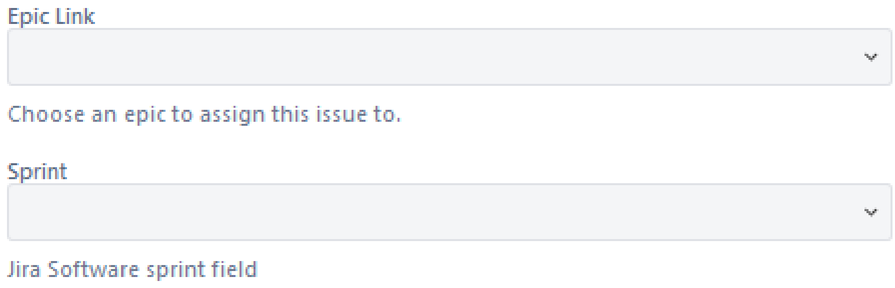


Create an Issue

Fields in the Create Issue form

Epic Link: An Issue creator can provide an epic link, if the issue belongs to any of those.

Sprint: The user can define in which sprint, this issue belongs to, when this issue should be addressed.



Clone an Issue

Cloning means to copy. To clone an issue means to create a duplicate issue within the same project. A cloned issue can be treated as a new issue and edited like other issues.

We should consider the following points while cloning an issue.
A cloned issue is completely a separate issue from the original issue.
Any action or operation taken on the original issue does not have any impact on the clone issue and vice-versa.
The only connection between the original and clone is the link that is created.

Information that is carried from the original issue to clone issue is as follows :

- Summary
- Description
- Assignee
- Environment
- Priority
- Issue Type
- Security
- Component
- Reporter
- Affects Version
- Fix Version
- Attachment
- Projects
- Content of custom fields are also cloned

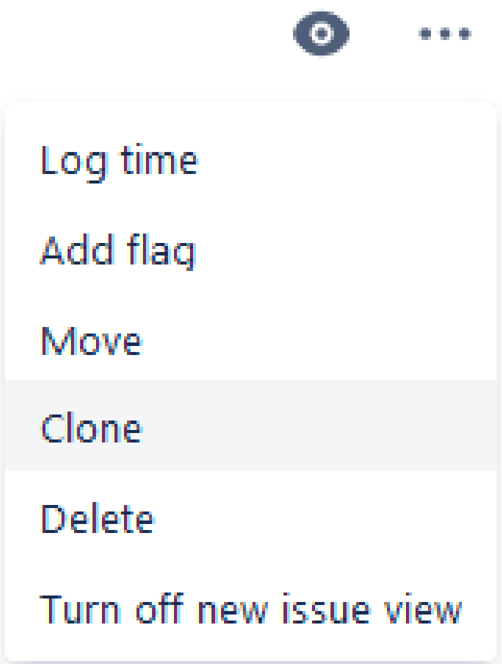
Clone an Issue

Information that is not cloned:

- Time Tracking
- Comments
- Issue History
- Links to confluence pages

Steps to Follow for Cloning

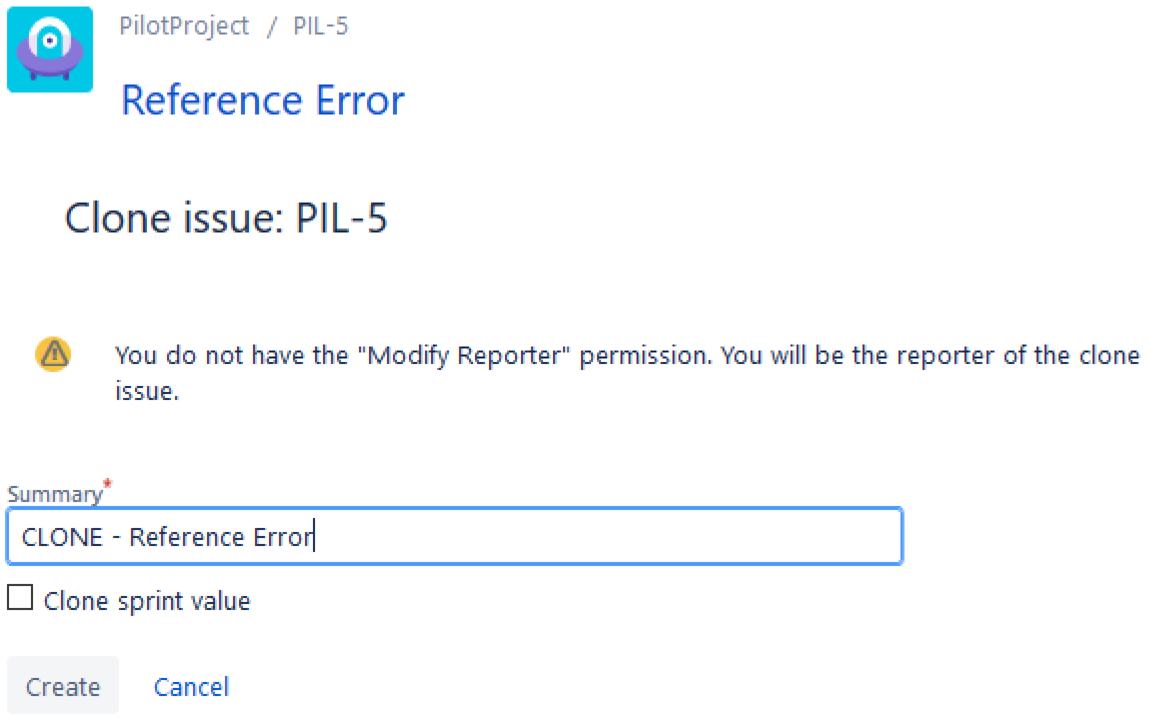
Open a JIRA issue that is supposed to be cloned.
Select More(…) → Clone when the screen appears.



Clone an Issue

In the clone screen, there are a few options given to the users, which are as follows:

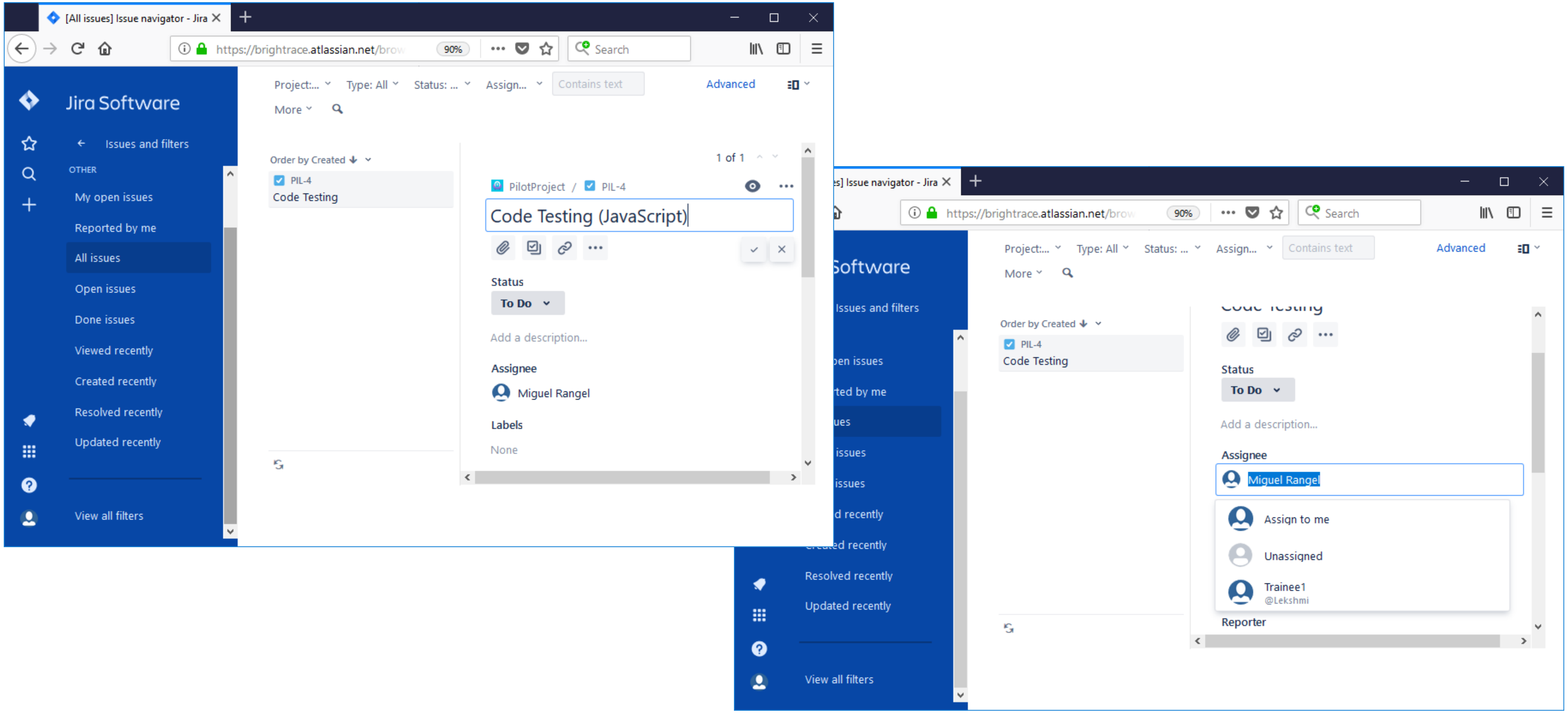
- A user can change the summary while cloning it.
- If the issue contains links to other issues, a user can check the checkbox to contain the clone issue or uncheck if the user does not want to be a part of the clone issue.
- If the issue has sub-tasks, the user can select/deselect the checkbox to contain the sub-tasks in clone or not.
- The same is applicable for attachment as well.
- It also gives an option, whether to carry or not – the sprint value to the new clone issue.



Edit/email/label/link/move an Issue

Edit an Issue

To edit an issue in JIRA, the user has to navigate to the issue, which is required to edit and the click on the issue to open the page and modify the issue details in the corresponding field of the edit Issue page.



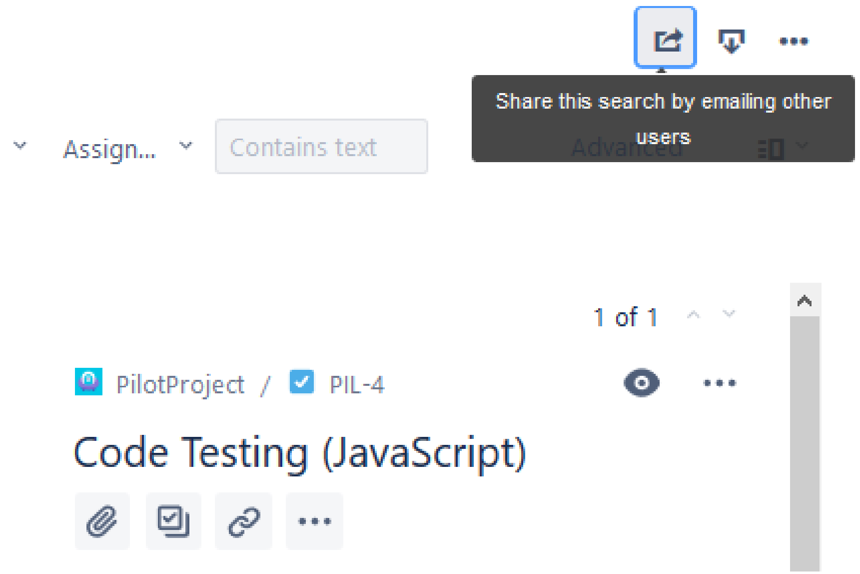
Email an Issue

A user can email an issue to other JIRA users. There are two ways to do it:

- By share an issue
- By mention these users in issue's Description or Comment field.

Sharing an Issue

Navigate to the issue that is required to share and click to view the issue. Click on the **Share Symbol** on the top right hand side of the page.

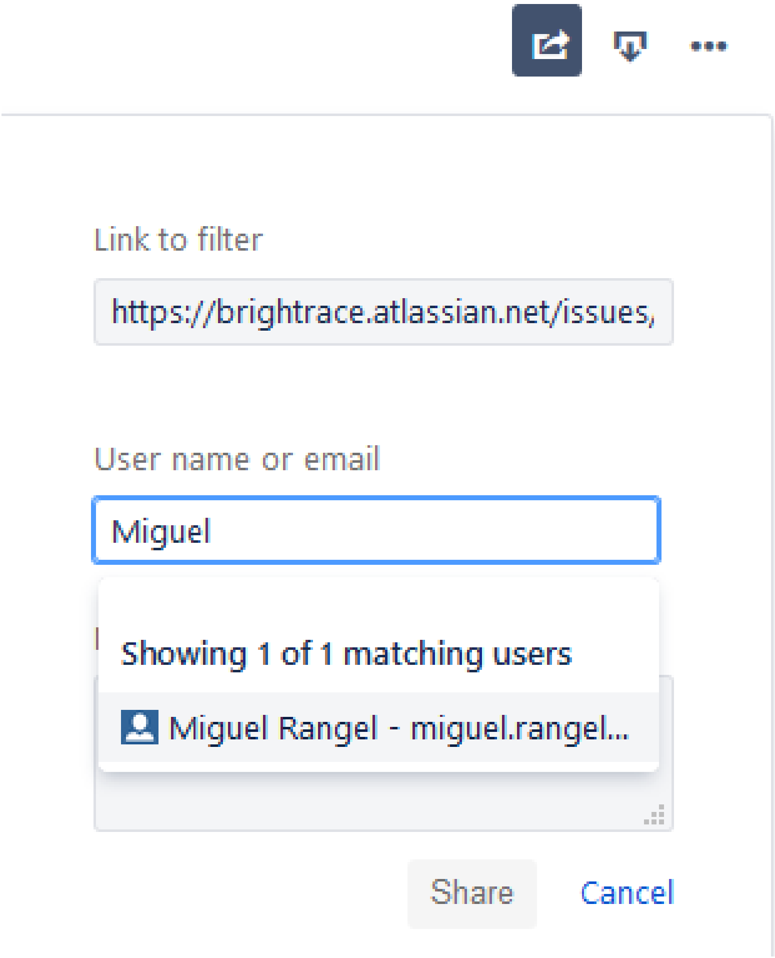


Email an Issue

You can write the JIRA users' name by typing their usernames or partially/all of their full names as registered with JIRA or type the email addresses of the individuals with whom you would like to share the issues.

When the user starts typing a JIRA user's username or name, or a previously specified email address, an auto-complete dropdown list of users appears.

Add optional note. Click on the Share button present in the Share wizard section. The following screenshot shows how to share/email an issue to a user.

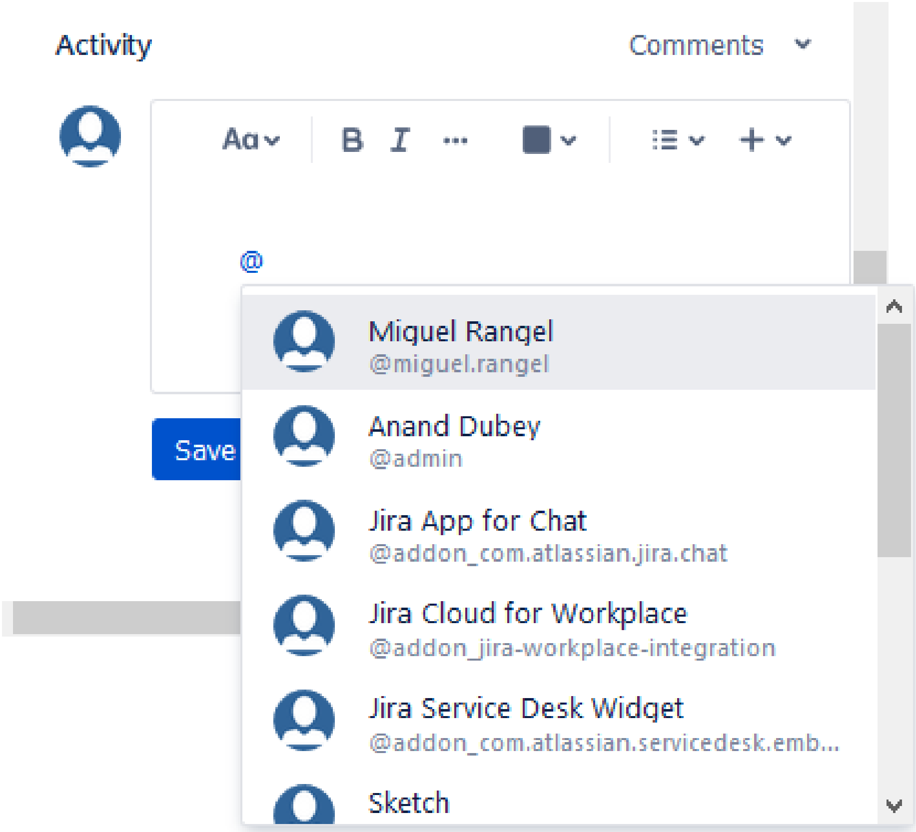


Email an Issue

Mention Users in Description / Comment

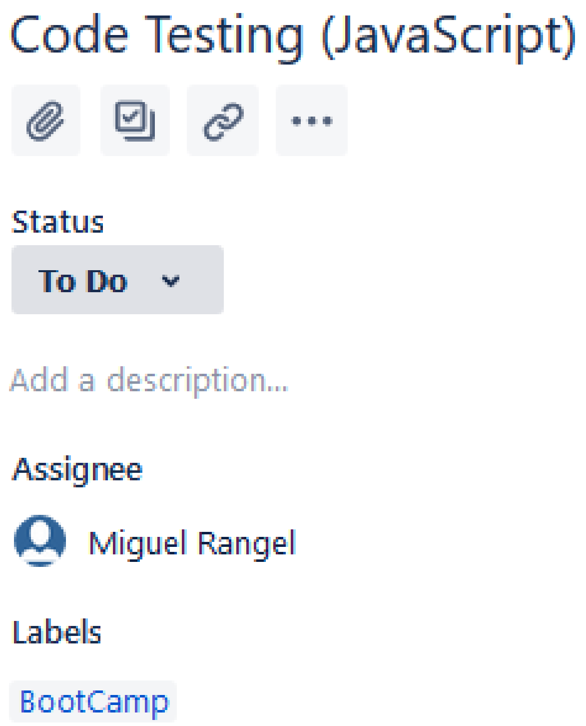
In the issue's **Description** or the **Comment** field, type '@' and then the first few characters of the JIRA user's username or partially/all of their full name as registered with JIRA.

As the user starts typing, a list of suggested users will appear in a dropdown list below the field. The user should select based on the referenced users by completely typing the JIRA user's username or choose from the list of suggested users in the dropdown list.



Label an Issue

A Label is used to categorize an issue. It is similar to the hashtag (#) used in twitter, Facebook or other social sites. It also helps while searching an issue. While viewing an issue, the label appears in the detail section of the issue.



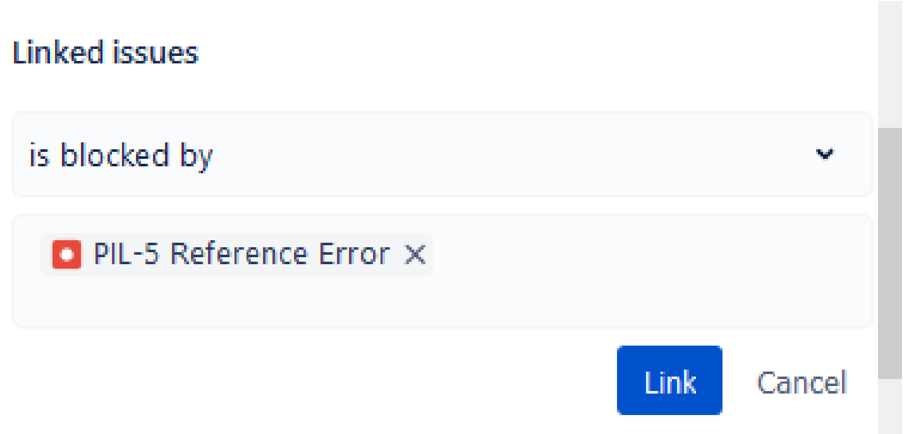
Link an Issue

This feature is very useful when two issues have some type of a dependency on each other as if they are duplicates or relate to each other, upstream downstream dependency or blocking issues.

Create a Link to Another Issue

For creating a link to another issue, navigate to the issue and click on the Link Issue button.

Now select/search issue from the dropdown list. And click on "Link" button.

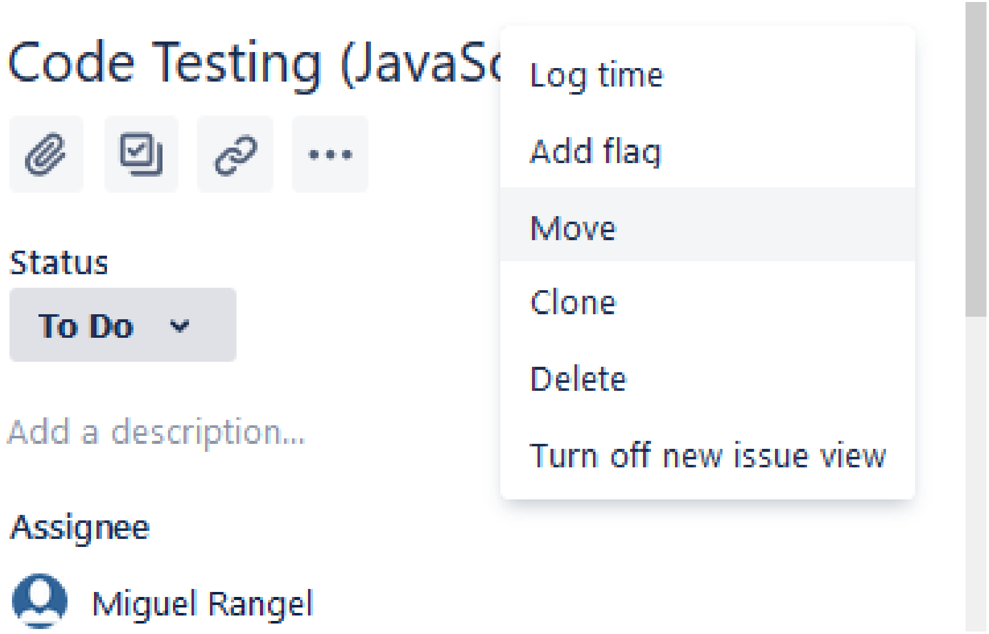


Move an Issue

JIRA has a feature to move an issue from one project to another project.

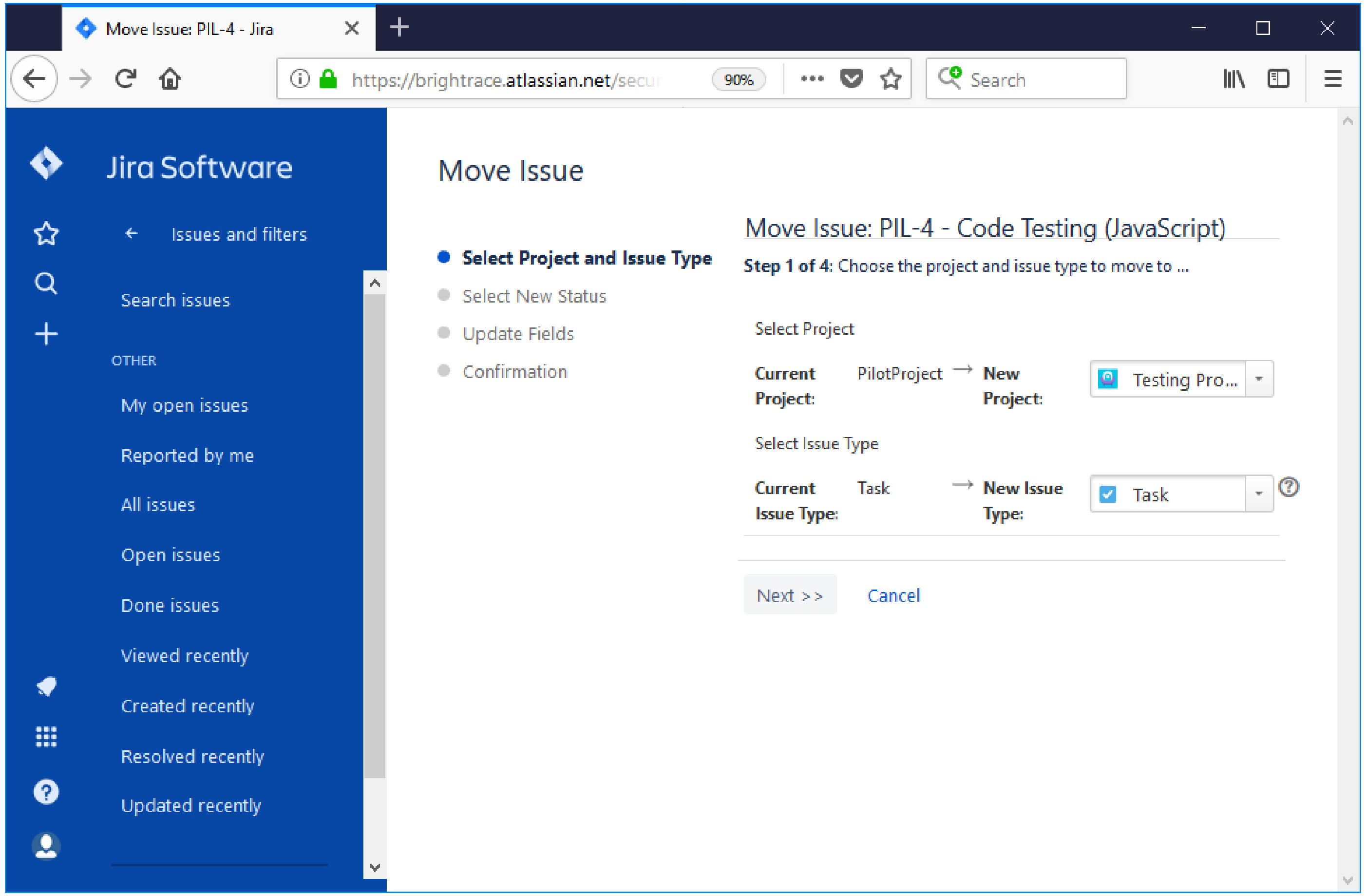
Steps to Follow

Go to the View Issue page that needs to move into another project. Select More (…) → Move.



Move an Issue

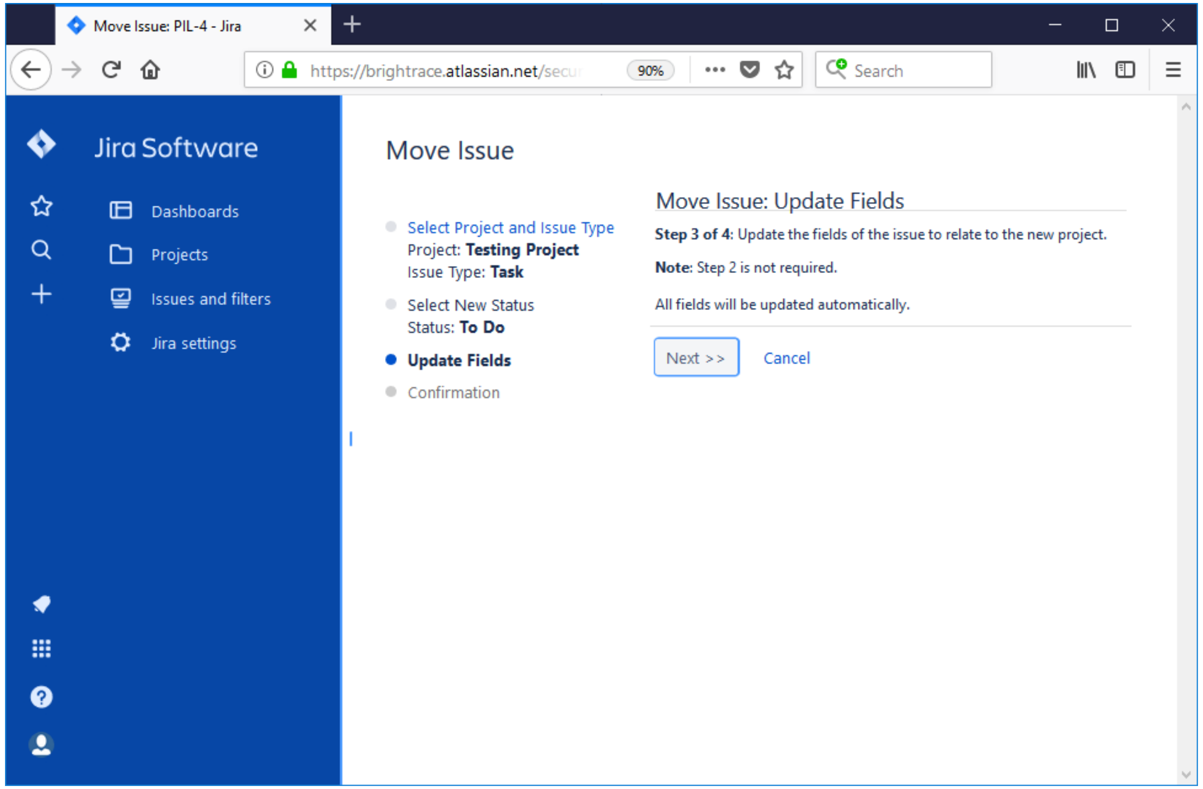
In the first step of the **Move Issue** wizard, select the new project where the issue will move, and if required/desired, change the issue type. Click on **Next** to continue.



Move an Issue

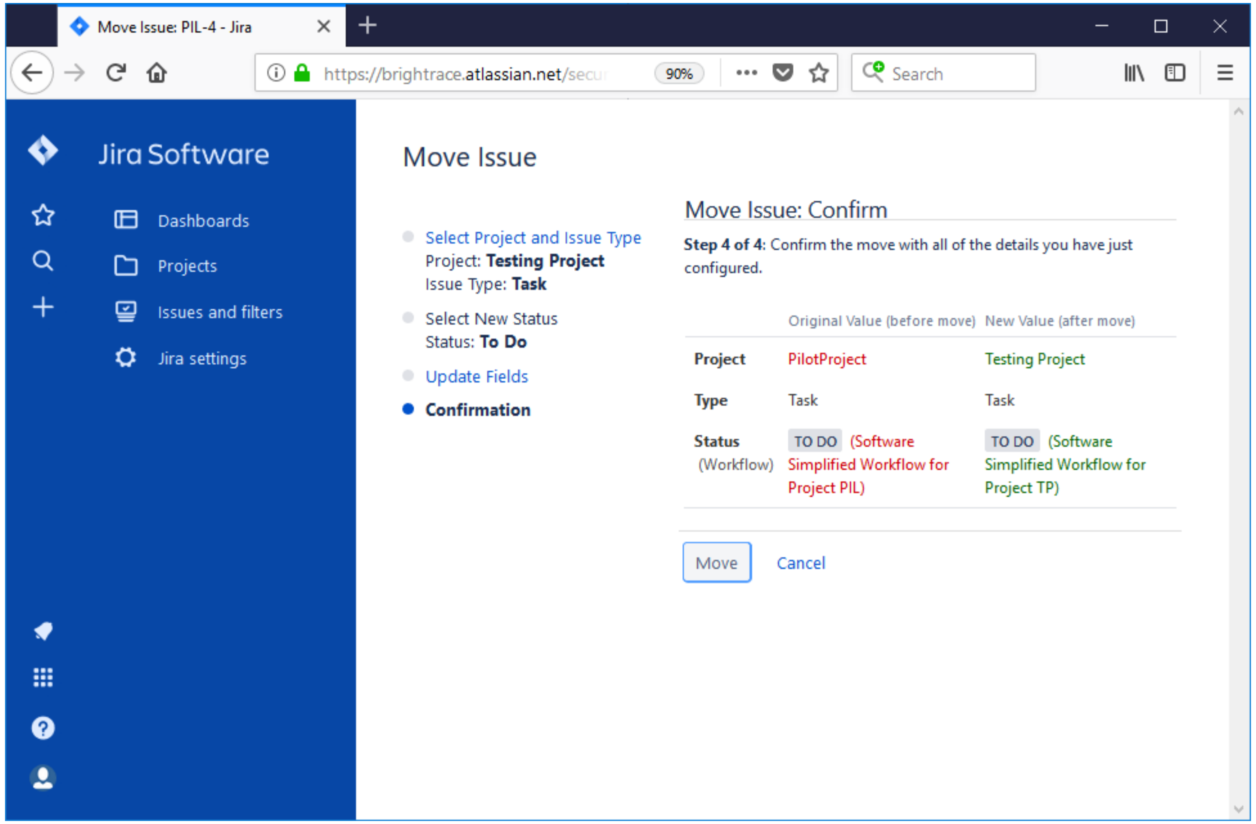
If there is a need to change the status of the issue, you can go to Select Status page. Select the new status for the issue and click on the Next button to continue.

If required to specify the values for any required custom fields, the Update Fields page is displayed. Specify the desired values for each field, and click on Next to continue.



Move an Issue

The confirmation page will display with all the changes. If a user wants to revise any of the changes, click the appropriate step in the left hand side menu to return to that page of the wizard. After that, click on the **Move** button to move the issue to the target project.



Create a Subtask

Subtask

An issue can be completed by performing many tasks with different persons like Dev, QA, UAT, Business, Support, etc. To track the progress in each department, sub-tasks are created in an issue and assigned to the concern person. Once all the sub-tasks are resolved, the issue can be marked as completed.

Points to Note for Creating a Subtask

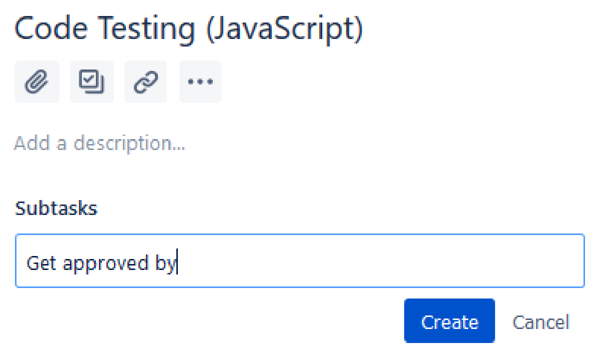
- All subtasks are an essential part of their parent issue.
- All subtasks are visible on the main screen of the parent issue.
- Subtasks always belong to the same project as their parent issue.
- Subtask has all fields that are present in the standard issue.
- Subtasks cannot have a subtask of their own.

Subtask

Steps to Follow for Creating a Subtask

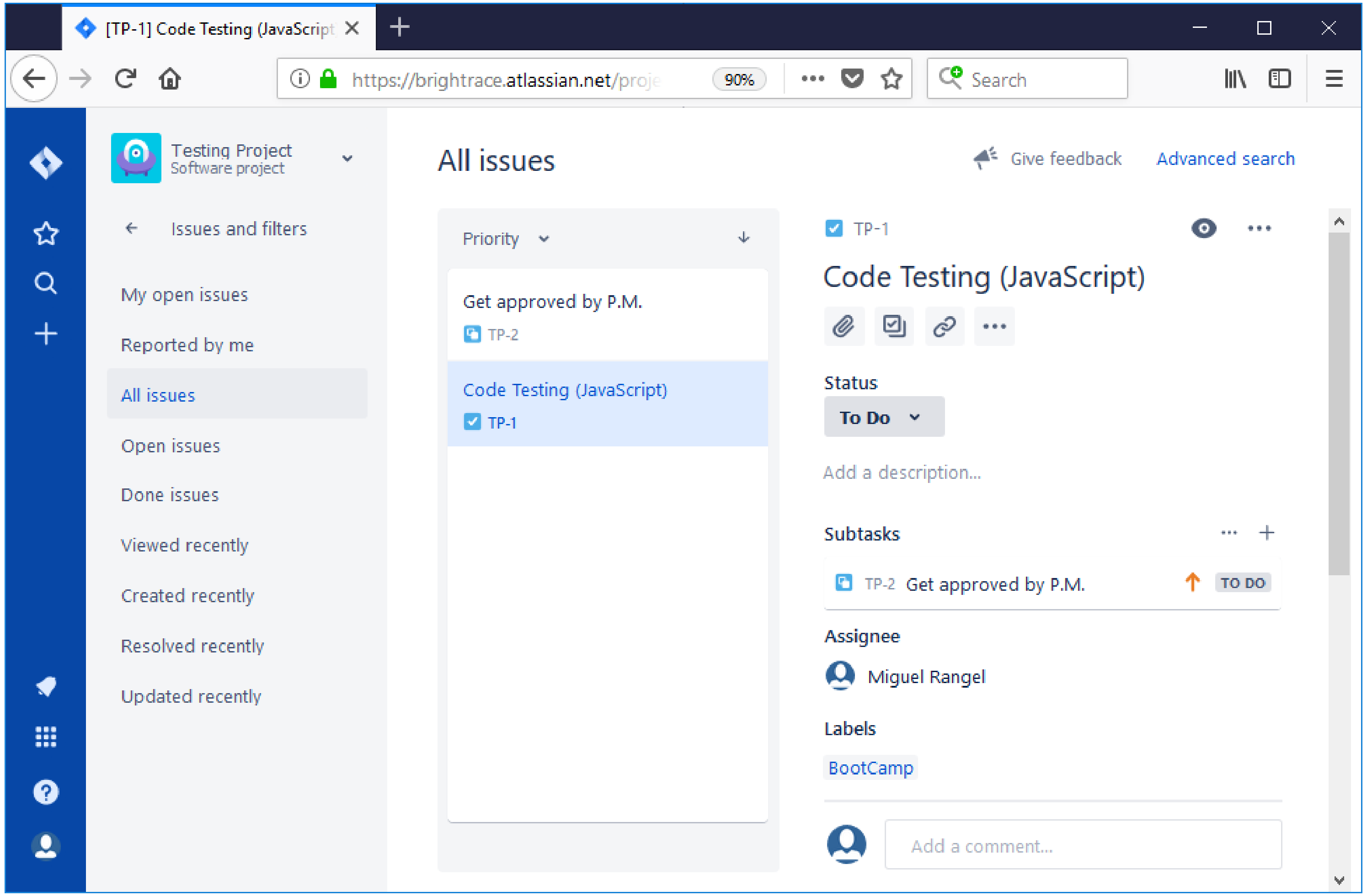
Open an issue where subtasks should be created.
Click on the "Create Subtask" button.

Enter the details in all the required fields and then click on Create. The following screenshot shows the **Create Subtask Form** with the required and optional fields.



Subtask

Once a subtask is created, it will be available on the Main Issue page.



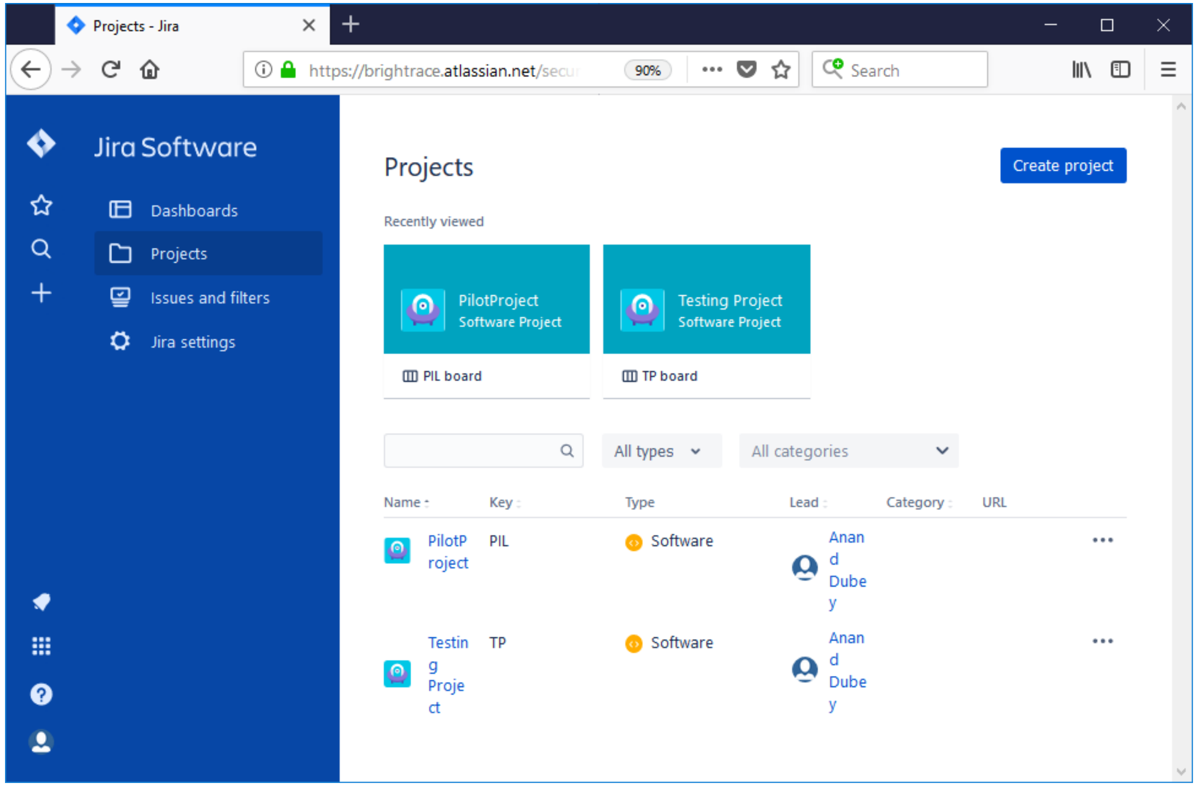
Reports

Reports

JIRA provides different types of reports within a project. It helps to analyze the Progress, Issues, Showstoppers and Timeliness of any Project. It also helps to analyze the resource utilization as well.

How to Access Reports

To access reports in JIRA, you should go to Project → choose Specific project.



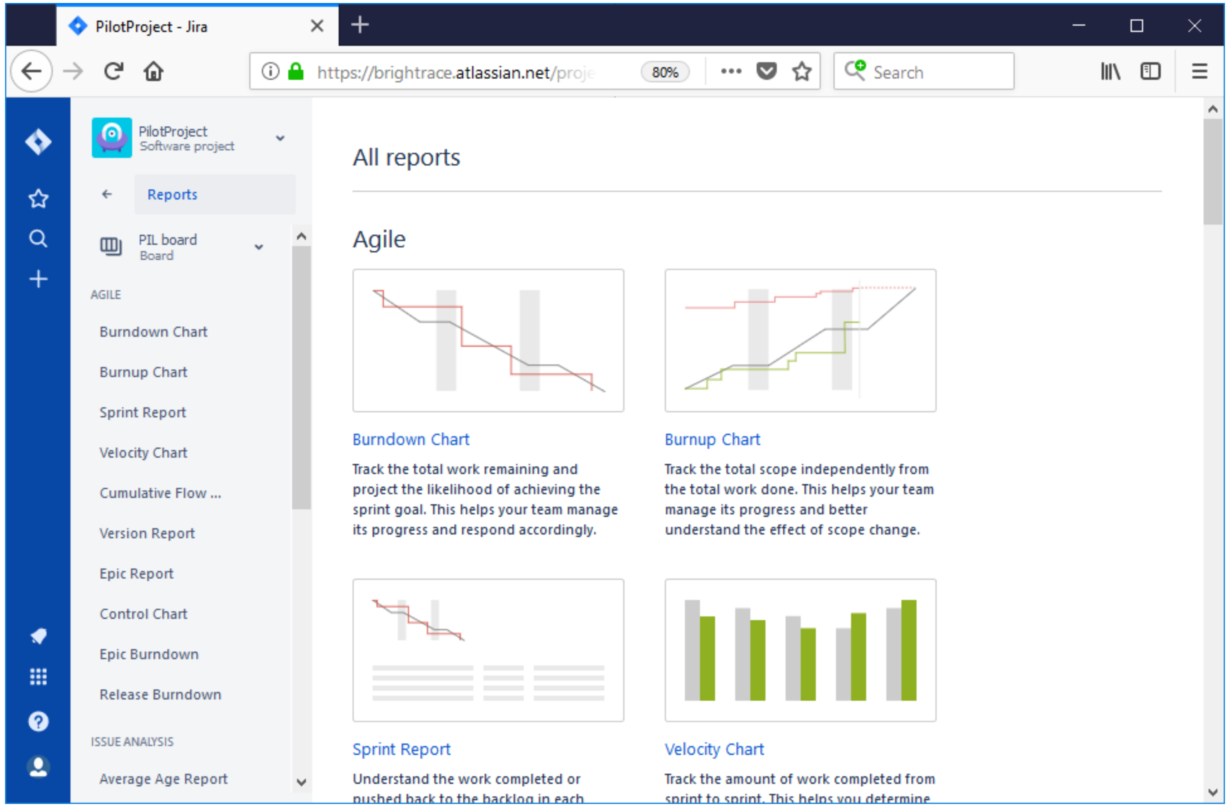
Reports

Click on the Reports option on the left side of the page. It will display all the reports supported by JIRA.

Type of Reports

JIRA has categorized reports in four levels, which are:

- Agile
- Issue Analysis
- Forecast & Management
- Others



Created vs Resolved Issues Report

Created vs Resolved Issues Report

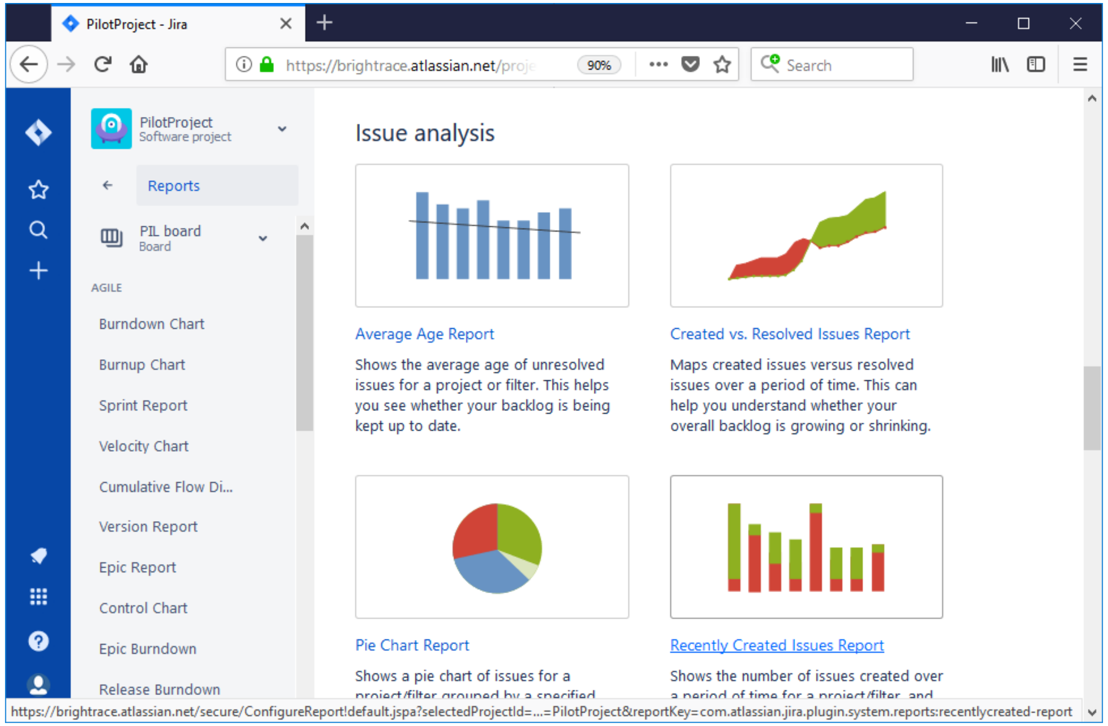
It displays the number of created issues versus resolved issues over a given time-period. It helps to understand whether the overall backlog is moving towards resolution or not.

Generate a Report

To generate a report, you should follow the steps given below.

Step 1

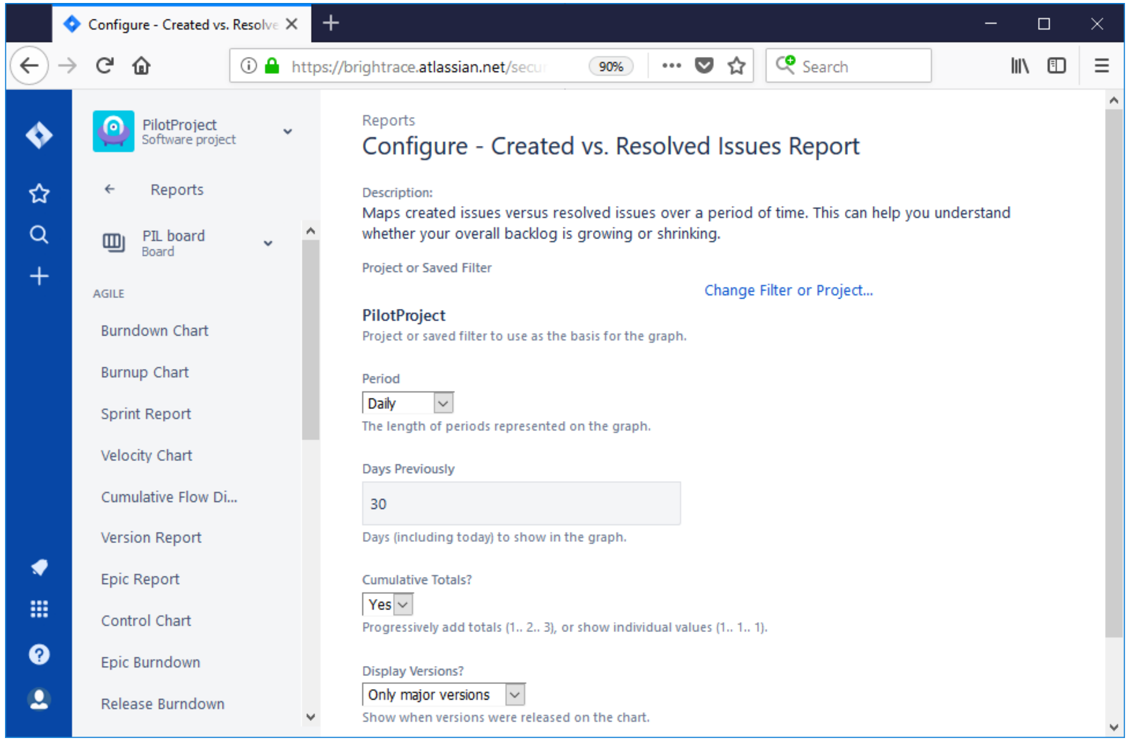
Go to Project → choose a specific project. Click on the Report option on the left side of the menu. Go to Issue Analysis and click on Created Vs Resolved Issues Report.



Created vs Resolved Issues Report

Step 2

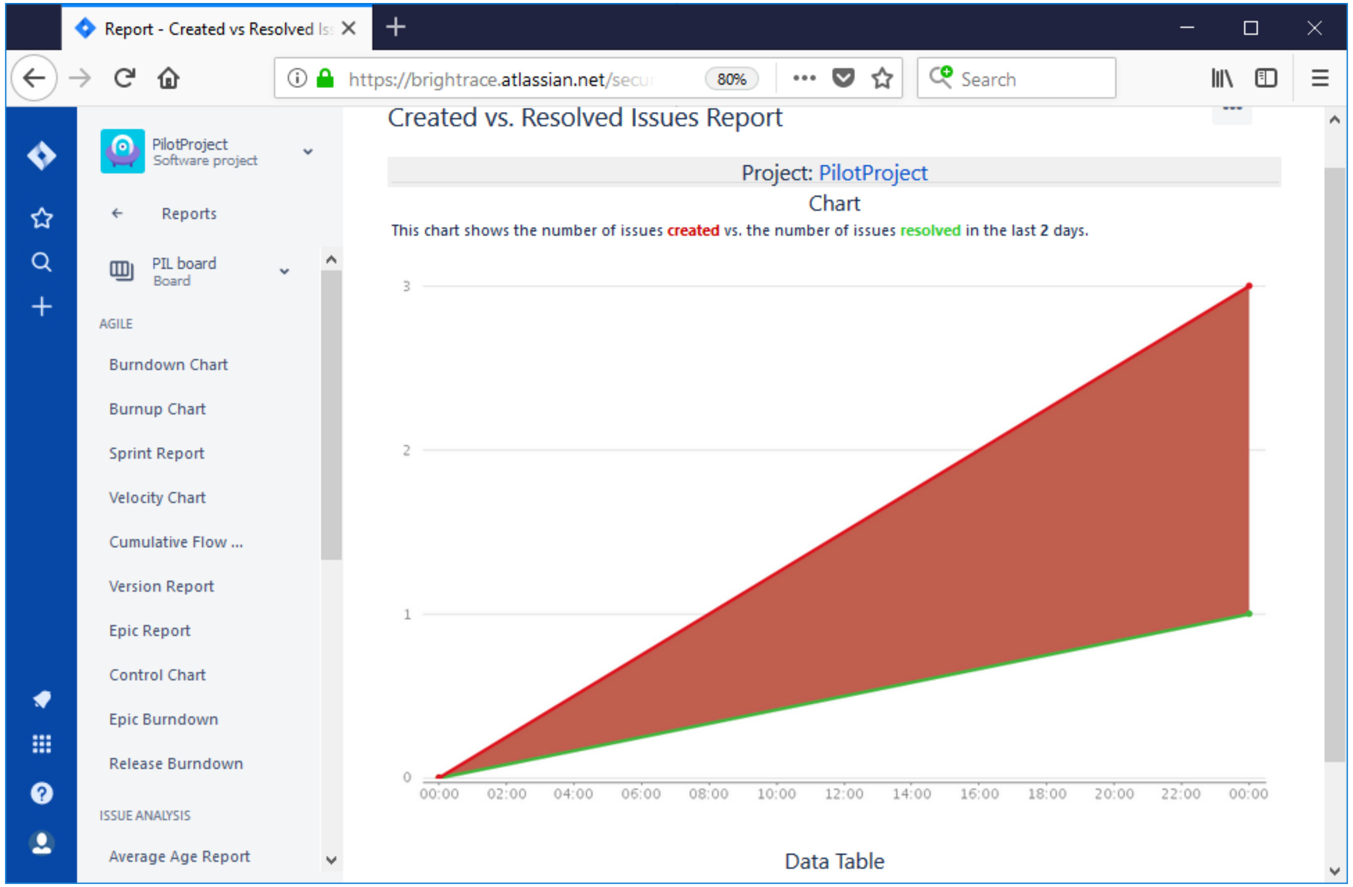
Select the Project or the issue filter for which the report has to be generated. Select the time-period to see reports like Daily, Weekly, Monthly, Quarterly, Annually, etc., available in the dropdown box. Enter the number of days in the **Days Previously** field to show in the graph. Select **Yes** or **No** for Cumulative totals. Select Display Versions as All Versions from the dropdown list.



Created vs Resolved Issues Report

Step 3

Click on Next to generate the reports. The following screenshot shows how the generated report looks like.



The created issues are displayed in red, while the resolved issues are in green color.

Burndown Chart Report

Burndown Chart Report

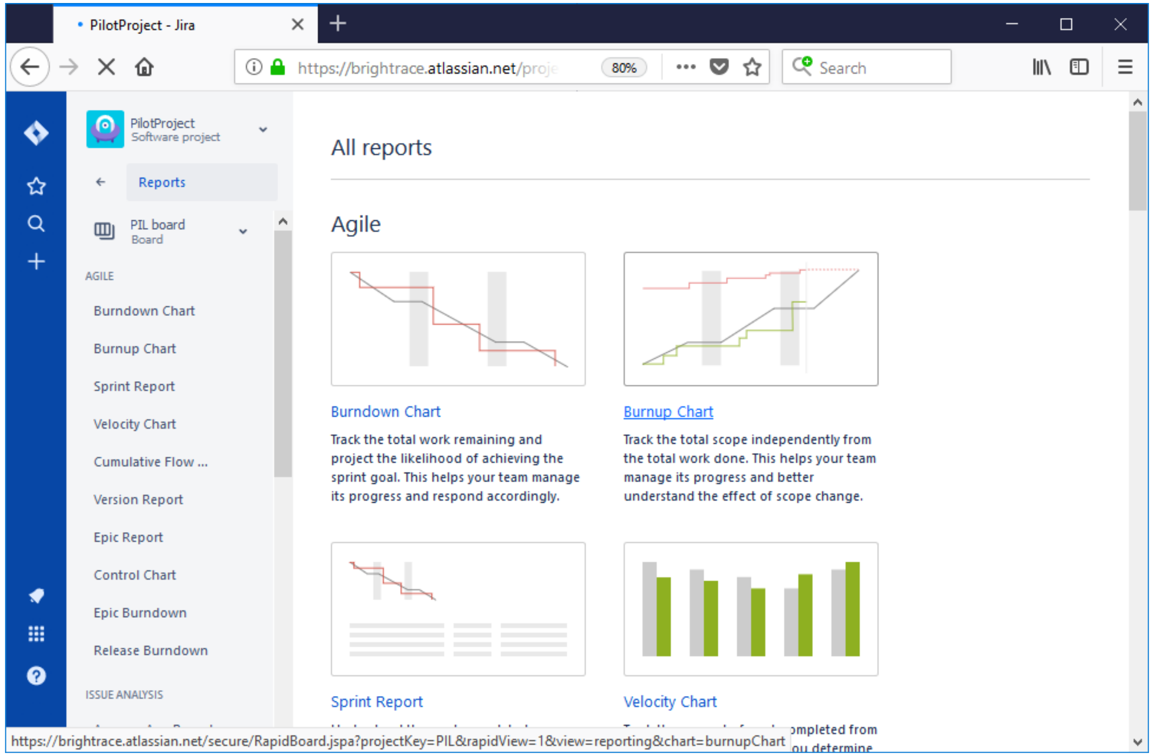
It displays the total work remaining to achieve the sprint goal for a given time to sprint. It helps the team to manage the progress and respond accordingly. This chart is an important feature of Agile – Scrum methodology.

Generate a Report

To generate a report, the user should follow the steps given below.

Step 1

Go to Project → choose a Specific project. Click on the Report option on the left side of the menu. Go to Agile and click on Burndown chart. The following screenshot shows how to access a Burndown Chart.



Created vs Resolved Issues Report

Step 2

It displays the Burndown chart of the sprint like how the team is progressing towards a committed task. The red line displays how much work is remaining, while the grey line shows the committed tasks. The team can see where they stand in terms of the progress of sprint as compared to the commitment at the starting of that sprint. The user can change the Sprint and Y-axis by selection from a dropdown.