ATLASSIAN University

Jira Administration Part 1

Cloud

Lab Workbook

Table of Contents

Jira Administration Part 1 Introduction

Many labs have optional exercises. These are not required to be done to complete the course. However, if you have time and interest, they supplement the exercises for the lab.

There are also appendices, which you don't need during class. They are full of useful information like additional reading and best practices. Dig into this section after class!

You'll log in as various users throughout the course. Here's a list of the users and what role they'll have.

Name	**Role**
Site administrator	Site administrator
Dakota Jones	Jira administrator
Sophie Nguyen	Development project administrator
Luis Beck	Development project member
Max Taylor	Software developer

To log in during the labs, you need your assigned site URL and each user's email address and password. If you are taking an On Demand course, this information is provided under the "Start here" tab of the course. If you are taking an instructor-led course, your instructor will provide you this information.

- **Note:** The password for every account you use in these labs is the same. Keep this password easily accessible.
- **Note:** When switching between products in these labs, you'll be able to see other sites. It's important that you choose the product on the site that's been assigned to you.

The language you see in the Atlassian product UI is set to your browser's language. If you wish to see the UI in English (to match the lab instructions), or in a different language, go to your Atlassian user profile and edit your account preferences.

Because the Cloud products are constantly being updated with new features, you may see some slight differences between the instructions in this lab workbook and the product you are using.

Lab 1 Course Overview

> ⓘ There is no lab for this module.

Lab 2 Introducing Cloud Administration

> ⓘ There is no lab for this module.

Lab 3 Setting Up Your Site

Lab 3 Exercise 1 Accessing Administration & Managing Subscriptions

Lab 3 Exercise 2 Configuring Site Access Settings

Lab 3 Appendix

Lab 3 Exercise 1 Accessing Administration & Managing Subscriptions

Access site administration:

1. Go to your site URL and log in as the **site administrator**.
   - **Note:** Do not log in with Google.
2. If you see onboarding screens, skip the questions or select whatever options you like.
3. Once you're logged into Jira, bookmark the page.
   - **Note:** Bookmark this address to save you time later when logging in as other users. It's important you log into the site that's been assigned to you.
4. To navigate to site administration, click the cog (gear) icon (Settings) in the menu.
5. Select **Billing** under ATLASSIAN ADMIN.
6. This opens a new browser window for site administration.

Manage product subscriptions:

> **Note:** The Billing overview page shows you details of your bill. You can get more billing details on the pages listed below **Overview** on the sidebar.

1. Click **Manage subscriptions** in the sidebar. Here you see your active subscriptions.
   - **Question:** What products are on this site (active subscriptions)?
   - **Answer**: Confluence, Jira Service Management, and Jira Software are on this site.
   - **Question** How many users are licensed and how many are used for the Jira Software subscription on this site?
   - **Answer**: Look at the numbers for Jira Software under Users.
2. Click **Add more Atlassian products** at the top of the page.
3. Scroll down the **Discover new products.**
   - **Note**: The Discover new products page is where you can add more Atlassian products to your subscription. You can also add recommended Confluence and Jira apps.
4. Access product administration:
   a. Scroll to the bottom of the site administration sidebar. You see two links under APPLICATION SETTINGS – one for Jira and one for Confluence.
   b. Click **Jira**.
   c. This opens a new browser window showing Jira product administration. Note the Jira icon in the menu. Close the tab.
   d. Back on the site administration window, click **Confluence** under APPLICATION SETTINGS in the sidebar.
   e. This opens a new browser window showing Confluence product administration. Note the Confluence icon in the menu. Close the tab.

Lab 3 Exercise 2 Configuring Site Access Settings

1. From site administration, click **Site access** in the sidebar. Here you control how users get access to your site.
2. Generate an invitation URL:
    a. Click **Invite links**.
    b. Click the button next to **Confluence** (if it's not already enabled).
        - **Note**: You can copy this URL and send it to anyone so they can get access to a product quickly.
    c. Click **Create a new invite link for Confluence**. Note the message that the previous link stops working, and the new link starts working immediately.
    d. Click **Create**. Now you see a new link.
    e. Uncheck **Confluence**. The link is now disabled.
3. Control whether users can invite others:
    a. Click **User invites**.
    b. Check **Existing users can send invitations to anyone** (if it's not already enabled). Now any user on your site can invite new users.
    c. If you made a change, click **Save changes**.
4. Controlling who can join your site:
    a. Click **Approved domains**.
        - **Note:** Here we control who can join your site. Currently, no domains are approved so all users need to request access or be invited.
    b. Check **Approve any domain**.
        - **Note**: Site visitors can now immediately create their own accounts. Your site is now public. You can choose whether to get notified every time a new user gets access to your site by checking the 'Notify all site admins when a new user joins with an approved domain' setting.
          You should consider the number of users your license supports when deciding whether to allow anyone to join your site.
        - **Note:** If you check Approve the following domains and enter one, then any user with an email address in that domain can join the site. You'll automatically be notified about any new user.
    c. Recheck **Don't approve any domain**. You don't need to save as these are the original settings. We'll invite users in the next lab.

Congratulations on completing the lab!

Lab 3 Appendix

Further Reading

Reference	**URL**
Specify how users get site access	go.atlassian.com/cloudsiteaccess
Subscriptions and billing	go.atlassian.com/cloudsubscriptions

Best Practices

Pitfall	Example Use Case	Best Practice
The site administrator is spending too much time inviting others.	You want users to join your site by invitation only but you're spending a lot of time creating the invites.	Allow others to invite users to reduce your administrative load. But be mindful of your subscription limits.

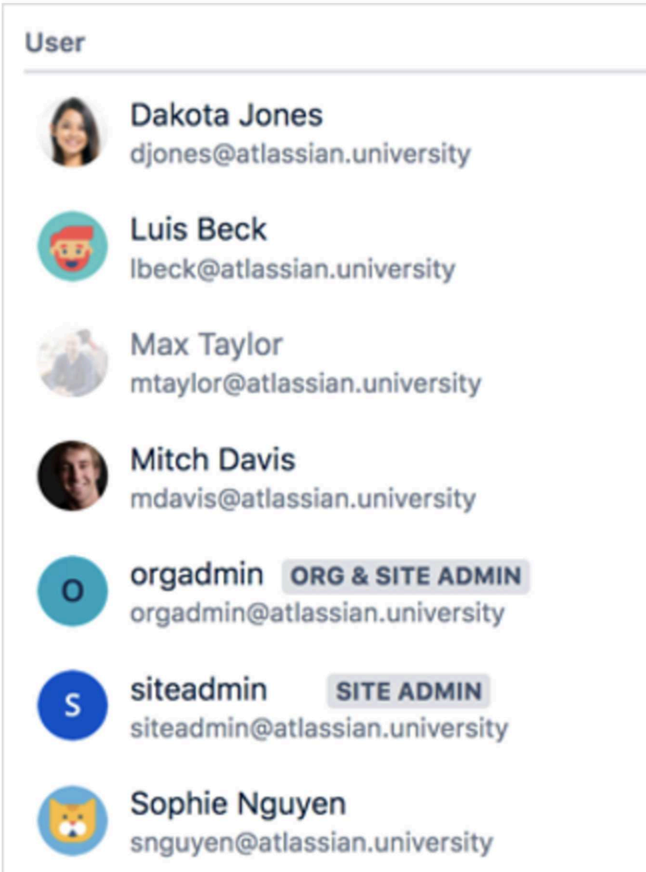
Lab 4 Managing Site Users & Their Product Access

Lab 4 Exercise 1 Exploring Product Access

1. Log in to your cloud site as the **site administrator**.
    - **Note:** Remember to always log into the site assigned to you.
2. Click the cog icon (Settings) in the menu and select **User management**.
3. Click **Product access** (under SITE SETTINGS).
4. Review the existing product access and answer the questions below.
    - **Question**: What products do new users have access to by default?
    - **Answer**: New users have access to Jira Service Management, Jira Software, and Confluence by default. Note the green check for each product.
    - **Question:** If a user joins your site and is given access to only Jira Software what group will they be placed into by default?
    - **Answer**: A new Jira Software user will be placed into the jira-software-users group by default. Note the DEFAULT ACCESS GROUP indicator by the product.
    - **Question:** Which groups have access to all products on this site?
    - **Answer**: The administrators and site-admins groups have access to all products on this site.
5. Make the **administrators** group the default group for Confluence by clicking Options (**...**) next to that group and selecting **Make this group default**.
    - **Question:** Were you successful?
    - **Answer**: No. You cannot make a group with administration access a default access group for a product. If you could, that would mean that any new users that were given access to Confluence would automatically be administrators for Confluence and Jira too!
6. Remove the **jira-software-users** group from Jira Software product access by clicking Options (**...**) next to that group and selecting **Remove group**.
    - **Question:** Were you successful?
    - **Answer**: No. You cannot remove a default access group. Each product needs at least one default group to assign users to when they are given product access.
    - **Question:** How many licenses are used for Jira Software?
    - **Answer**: Look at the numbers next to the Jira Software product name. Make a note of this number.
    - **Question:** What product will users land in when they log into your site?
    - **Answer**: When users log in to your site they'll land in Jira. See the note in the What you need to know box on the right. Optionally, click **Change this setting**. View the dropdown but don't change the setting.
7. In the sidebar, click **Access requests**.
    - **Note:** Here you can grant or deny product access requests from users. A teammate may have sent them the product URL but your site settings don't allow them to self-signup. In that case, they'll see a button to request access when they try to access your site.

Lab 4 Exercise 2 Inviting Users

1. Navigate to the **Users** site administration page (under USER MANAGEMENT).
   - Note: Here, you see all the users that are on this site. When you only have a few users, you see a simple invite.
2. Click **Invite users** at the top of the page, which gives you more options:
   a. Enter the email addresses for **Dakota Jones**, **Mitch Davis**, **Sophie Nguyen**, and **Luis Beck** separated by commas. These emails were provided to you along with your cloud site information.
   b. For Role, ensure **Basic** is selected.
      - Note: Basic gives them default access to all products on the site as set up in Product access. You can see the default products selected below.
   c. Leave all three products selected and Group membership blank. They'll be added to the default product groups automatically.
   d. Leave the domain unchecked.
   e. Click to expand **Personalize email invite**.
      - **Note:** Here you can add any text to personalize the invitation email that's sent to your invitees.
   f. Click **Invite 4 users**. The users are immediately added to the list of users and use a license for the products they can access.
      - **Question**: How are the new users' full names and avatars known as you just entered their email addresses?
      - **Answer**: When you invite a new user to your site, their profile information is accessed from their Atlassian account. This account exists independently of any site they are invited to.
3. Back on the **Users** page, confirm your list Includes these users. Note, the email addresses may be different to what you see below, and there may be some other users.



   a. Click a user's name and confirm they have access to all three products and are in all three default product groups.

4. Navigate to the **Product access** page. You just added 4 more users who have access to all products. Confirm there are now 4 more licenses used for each product. You may need to refresh the page.

Lab 4 Exercise 3 Managing Groups

1. Create a group and add users:
2. Navigate to the **Groups** site administration page (under USER MANAGEMENT).
    a. Note the DEFAULT ACCESS GROUP indicators next to the three default product access groups.
    b. Click **Create group**.
        i. For the name, enter **Development**.
        ii. Optionally for the description enter **Members of Development**.
        iii. Select **Add members in the next step**
        iv. Click **Create group**.
        v. Select **Luis Beck** and **Sophie Nguyen**.
        vi. Click **Add**.
            - **Question:** On the Development group page, note the message on the right that says this group currently has no product access. Do you need to add product access for this group so Sophie and Luis can access the products on this site?
            - **Answer**: No, you don't need to add product access for this group. Both members already have default access to all the products on this site through their membership in the default product groups. You only need to be in one group that has product access for you to get access to a product.
3. Explore administrators group access:
    a. Return to the **Groups** site administration page.
    b. Note the columns on the right – **Access to product** and **Product administration**.
        - **Question:** Which groups have both product access and access to product administration
        - **Answer**: The administrators and site-admins groups have both product access and access to product administration.
4. Set up the Jira administrator:
    a. Add Dakota Jones to the jira-administrators group:
        i. On the **Groups** page, open the **jira-administrators** group.
        ii. Click **Add members** and add **Dakota Jones**.
        iii. Click to open the **Dakota Jones** user.
        iv. Confirm the **jira-administrators** group is listed in the Groups section. Refresh the page if you don't see it.
            - **Question:** What products does Dakota have access to and why?
            - **Answer**: Dakota has access to all the products on the site –Jira Service Management, Jira Software, and Confluence. When we invited her, we gave her access to all the products and she was added to the default product groups.
            - **Note:** Being a Jira administrator means you have access to the Jira administration pages and can create company-managed projects. (Note

company-managed projects were previously named classic projects). But to view issues or work in projects you need to be in a group that has the appropriate product access. Teams In Space wants Jira administrators to have access to all products. This may not be the case for all organizations. Some may want to prevent Jira administrators from seeing the actual content and so prevent mistakes with the data. It's up to your organization and its policies whether or not to allow Jira administrators product access.

5. Give jira-administrators group access to all products:
    - **Note:** Even though Dakota already had all product access, the site administrator wants to ensure that anyone in the jira-administrators group gets access to all products, as they may have originally been invited with limited product access.
        i. As the **site administrator**, navigate to the **Product access** page. You're on the **Product access** tab.
        ii. For **Jira Service Management**, click **Add group**.
        iii. Select **jira-administrators** and click **Add groups**
        iv. Repeat these steps to add the **jira-administrators** group to **Jira Software** and **Confluence**.
        v. Refresh the page if you don't see your changes.
6. Test access as Dakota:
    - **Note:** In these labs, you'll log in and out as various users. To lessen the amount of logging in and out, use different browser windows. However, you can't just open a new tab and log in as another user, as your original tab will be logged in as that user too. You have a few options:
        i. Open an incognito/private window in your current browser.
        ii. Open a separate browser if you have another one installed. For example, if you're using Google Chrome, open Firefox.
        iii. Log out as the current user by clicking their avatar at the bottom of the global sidebar. This method will require a lot of logging in and out!
7. To simplify the instructions, when you need to log in as another user, we'll tell you to use your incognito window, but use the method that works for you.
    a. Open an incognito window, go to your site bookmark, and log in as **Dakota Jones**.
    b. If you see onboarding screens, skip the questions or select whatever options you like.
    c. If you get prompted to choose navigation, choose **Use improved navigation**.
        i. In Jira, click the cog (gear) icon (Settings) in the menu to confirm she still has access to Jira administration.
        ii. Click **Search** then enter return on your keyboard.
        iii. Confirm Dakota can see some Jira issues, so she has Jira product access.
        iv. Log out as Dakota and minimize the window.

Lab 4 Exercise 4 Troubleshooting a User Log in Issue

1. Max Taylor has complained to you, the site administrator, that he can't log in to your site. He needs access to Jira Software, Jira Service Management, and Confluence.
2. As the **site administrator**, resolve the problem.
3. See the next page for the answer.
4. Navigate to the **Users** site administration page and click to view **Max Taylor**. Review his account settings to find and fix the problem.
    - **Question:** Does he have access on the site?
    - **Answer**: No, he doesn't have access to the site.
5. Click the button next to **Has access on the site** so it shows green.
    - **Question:** Max now has access to the site but will he be able to access the products?
    - **Answer**: Max can't access the products because he doesn't have product access.
6. Under Access, click each of the three product buttons to give him access to **Jira Service Management**, **Jira Software**, and **Confluence**. Note that the default product access groups are now added under Groups at the bottom of the page. (If you cannot click the product buttons, ensure his Role is Basic and not Trusted.)
    - **Note:** It's easy to revoke and restore site access by simply clicking the Has access on site button. You can leave the products checked but once you remove site access the user can't log in and they will no longer consume any product licenses. This can be useful for users such as contractors who are used regularly but you don't want to give them continuous access. You can simply restore their site access when they return and they are given access to the products they need.
7. Click the three dots at the top right of Max's account page.
    a. Note, but don't click, the option to remove the user.
    b. Don't remove Max but this is where you would do so if you needed to remove a user.

Lab 4 Appendix

Further Reading

Reference	URL
Groups and product access	go.atlassian.com/cloudgpproductaccess
Managing groups	go.atlassian.com/cloudmanagegps
Invite a user	go.atlassian.com/cloudinviteuser

Best Practices

Pitfall	Example Use Case	Best Practice
You are spending too much time changing product access.	You are giving users access to products on an individual level. A large number of users now needs access to another product. You have to update each user's product access individually.	Generally, it's preferable to use groups wherever possible to lessen your administrative load. Rather than updating multiple users as things change you can just update the group.
You run out of licensed users.	You invited many users but some of them don't need access to Jira and so never accepted your invitation.	Be wary of inviting too many users if you don't have a lot of licensed users. If you invite a user, even if they don't accept or even log in, they become a billable user.

Lab 5 Configuring Jira

Lab 5 Exercise 1 Exploring Application Links and Apps

Lab 5 Exercise 2 Brand your Jira

Lab 5 Exercise 3 Configuring Auditing

Lab 5 Exercise 4 (Optional) Exploring Configuration Settings

Lab 5 Appendix

Lab 5 Exercise 1 Exploring Application Links and Apps

1. Log in to your cloud site as the Jira administrator, **Dakota Jones**.
2. Access the Jira Administration pages:
   You can access the Jira Administration pages by either going through the menus or using a shortcut:
   a. Click the cog icon (Settings) in the menu. Select the type of Jira settings page you want to go to e.g. System, Products, Projects, Issues, or Apps. Then select the page from the sidebar.
   b. Or, a shortcut is to type **.** (period) or **gg**, which will bring up a search dialog, then type the name of the page you want to go to.
3. View application links:
   a. Navigate to the **Application links** Jira administration page using either the menus (under Products) or search for the page using the **.** (period) or **gg** shortcut (see previous step for details).
      - **Note:** Because your site has a subscription for Confluence, the application link to Confluence is set up automatically. If, for example, you had a Confluence Server instance you wanted to link to, you could do so here by entering its URL.
4. Explore apps:
   a. Navigate to the **Manage apps** administration page by clicking the cog icon in the menu then going to **Apps** or by using the **.** (period) or **gg** shortcut.
   b. Click the dropdown and select **System**.
      - **Note:** System apps are integral parts of your Jira products.
   c. In Filter visible apps, type **working hours** to find the Jira Working Hours plugin.
   d. Click **Audit log** under System apps.
      - **Note:** Here you see changes (if any) to your apps in the last 90 days.
   e. Click **Find new apps** in the sidebar.
      - **Note:** Here you can find and discover apps on the Atlassian Marketplace. All the ones you see are compatible with your Jira.
      - **Question**: How can you find the top rated Utility apps that are free?
      - **Answer**: Click **Sort** and select **Top rated**. Then click **Categories** and select **Utilities**. Finally check **Free**. Using search, you can easily find the apps that will help you extend Jira.
   f. If you want to install an app, do so when you've finished all the labs at the end of the course. Don't install any apps now as it may affect subsequent labs.

Lab 5 Exercise 2 Brand your Jira

1. Change the application title:
    a. Navigate to the **General configuration** Jira administration page (under **System**) and click **Edit Settings**.
    b. Change the Application title to **TIS Jira.**
    c. Click **Update** at the bottom of the page. (We'll enable this in the next step.)
2. Change the look and feel:
    a. Navigate to the **Look and feel** Jira administration page (under System).
    b. In the Logo section, click **Browse** (or Choose File).
    c. Go to the location on your local drive where you saved the lab file you received with your course materials and open **TIS.png**.
    d. Click **Upload Logo**.
    e. Scroll down and for Title, check **Show on dashboard sidebar** and click **Update**.
        - Question: What changed?
        - Answer: The Teams In Space logo now appears in the top left, and now the site title, **TIS Jira**, appears near your logo.
    f. Scroll down to the **Favicon** section.
        - **Note:** Here, you can also update the favicon (the icon that appears in the browser tab). We'll leave it at the default of the Jira icon as it's a handy way for users to see quickly if the tab is Jira or another product such as Confluence.
    g. Optionally, change the menu colors.
        i. Scroll down to the **Navigation colors** section.
        ii. Click the color square next to **Background**.
        iii. Choose your new color and click **Update**. Then refresh the page.
            - **Note:** Ensure you keep accessibility in mind when changing the colors, especially the contrast between the background and the text/icon colors. Go to https://webaim.org/resources/contrastchecker/ to check you're meeting accessibility standards.
    h. You can also update date / time formats. Leave these at the defaults.
    i. If you like the new look and feel, keep it. Or, you can revert to the defaults:
        i. In the Logo section, click **Reset to Default** next to the new logo.
        ii. Uncheck **Show on dashboard sidebar** and click **Update**.
        iii. In the **Navigation colors** section, if there are any Revert buttons next to any of the colors, click each of the **Revert** buttons.
        iv. Refresh the page.
        v. Navigate to the **General configuration** Jira administration page (under System) and change the Application title back to **Jira**.
            - **Note:** For the rest of this Lab Workbook, the screenshots will reflect the default look and feel.

Lab 5 Exercise 3 Configuring Auditing

1. Navigate to the **Audit Log** administration page (under System).
    - **Note:** Here you see the key configuration changes in Jira. Auditing is a tool to aid you in troubleshooting or for security purposes.
2. Click **Show more** for one of the changes and view the operation details.
3. Update the retention period:
    a. Click **Actions** then **Audit Log Settings**.
    b. Click the Retention period dropdown and select **6 months**.
        - **Note:** Before changing this setting at your site ensure you are following your company retention policies.
        - **Note:** You can also hide events triggered by your external user directory from appearing in the audit log.
    c. Leave Hide external user directory unchecked and click **Save**.
4. Search for log entries:
    a. To find all the configuration changes related to project roles in the past day:
        i. In the Contains text box, enter **Project role**.
        ii. Click **Time** and select **Within the last 1 days**.
        iii. Click **Update**.
5. If no entries are returned, change the search.
6. Optionally, click **Export** then **Export** again to export the audit log to a .csv file.
    - Note: You can't sort the audit log. But you can export the data to .csv and open it in a spreadsheet application to manipulate the data. When you export the audit log, all the events are included in the export, even if you currently have filtered the audit log results in the page.

Lab 5 Exercise 4 (Optional) Exploring Configuration Settings

1. Explore the default language setting:
   a. Navigate to the **General configuration** administration page (under System).
      - **Note:** The General configuration page contains many general settings related to your Jira instance.
   b. Click **Edit Settings**.
   c. Scroll down to the **Internationalization** section.
      - **Question**: What's the default language?
      - **Answer:** English (United States).
   d. Click the drop down for **Default language** and view the other languages that are installed. Keep the default language.
   e. Explore any other settings on this page.
   f. Scroll to the bottom of the page and click **Cancel** so no changes are made.
2. Explore time tracking:
   a. Navigate to the **Time tracking** administration page (under **Issues**).
      - **Note**: Here you can configure the working hours per day, working days per week, time format, and so on. Time tracking is on by default. You can disable time tracking for company-managed projects but not globally for team-managed projects. (Note team-managed projects were previously named next-gen projects). However, the team-managed project administrator can always remove the time tracking fields from the issues in their projects. Also, you can add other time tracking providers for advanced time tracking. You can find other providers on the Atlassian Marketplace.
   b. Leave the settings at the default.
3. Feel free to explore any other Jira configuration pages but don't make changes.

Congratulations on completing the lab!

Lab 5 Appendix

Further Reading

Reference	**URL**
Using AppLinks to link to other applications	go.atlassian.com/cloudapplinks
Auditing in Jira applications	go.atlassian.com/cloudauditing
Configuring time tracking	go.atlassian.com/cloudtimetrack

Best Practices

Pitfall	**Example Use Case**	**Best Practice**
Users can't read menus.	You have some users who are visually impaired. After updating the sidebar colors, they are complaining they cannot read the Jira menus.	Ensure you keep accessibility in mind when changing the colors, especially the contrast between the sidebar and the text/icon colors. Go to webaim.org/resources/contrastchecker/ to check you're meeting accessibility standards.

You lost needed auditing records.	You set the auditing retention period to 1 month, but the company policy is 6 months. A configuration change was made 6 weeks ago that negatively affected the installation but now you have no record of who did it.	Before changing the auditing retention period ensure you are following your company retention policies.

Lab 6 Configuring Global Permissions

Lab 6 Exercise 1 Removing & Adding Global Permissions

Lab 6 Appendix

Lab 6 Exercise 1 Removing & Adding Global Permissions

1. View global permissions:
    a. Log in to your cloud site as the Jira administrator, **Dakota Jones**.
    b. Navigate to the **Global permissions** Jira administration page (under System).
        - **Note:** On the left, we see the list of permissions. On the right, you can view the users/groups that have the associated global permission.
        - **Question**: Which global permission is available only to members of the various administrators groups?
        - **Answer:** The Administer Jira global permission is only available to members of the various administrators groups.
        - **Note**: The View Users link for each group shows what users are in each group but only site administrators can configure users and groups so Dakota, who's a Jira administrator, can't see this information.
          Jira also adds the system-administrators and atlassian-addons-admin groups to each permission. These are internal groups managed by Jira.
2. Remove global permissions from groups:
    a. Scroll down and view the **Make bulk changes** permission.
        - **Note:** Teams In Space has decided that only administrators, trusted users, and members of the Development group should have the ability to modify a collection of issues in one step.
    b. In the **Make bulk changes** row, click **Delete** for the default group **jira-software-users**. Click **Delete** again to confirm.
    c. Repeat this step to remove the **jira-servicedesk-users** group from Make bulk changes.
        i. **Note:** Because this site was updated from Jira Service Desk to Jira Service Management, the default group is still called jira-servicedesk-users. If it was a brand new site, the default group name would be jira-servicemanagement-users.
3. Add global permissions to groups:
    a. Scroll down to the **Grant Permission** section.
    b. Select the **Make bulk changes** permission.
    c. Click the **Group** dropdown.
        - **Question:** What do you think the Public option means here?
        - **Answer**: The Public group grants the permission you've chosen to anyone including non-logged-in users.
        - **Note:** Typically, you should avoid using Public with most global permissions, especially for public or production instances. Public includes non-registered and anonymous users. Instead, you should use project permissions to control the access of anonymous users. We'll discuss that in more detail in a later module.
    d. For Group, select **Development** and click **Add**.

   e. Now you should see the Development group listed but none of the default product access groups.
      - **Note:** New groups are not given any global permissions unless you explicitly add them.
   f. In the Grant permission section, view the permissions you can grant.
      - **Question:** Which global permission is missing and why?
      - **Answer**: The Administer Jira global permission is missing. The only way to assign groups this global permission is through the Product access site administration page. The site administrator can give another group administration access to Jira on the Administration access tab of the Product access page. Then that group will automatically appear in the list of groups for the Administer Jira global permission on this page.
4. Optionally, verify global permission change:
   a. Click **Search** and press **Return** on your keyboard.
   b. On the issue navigator, click the three dots on the top right of the page. You should see an option for **Bulk change**. This confirms Jira administrators have the ability to perform bulk change operations.
   c. Using your incognito window, go to your site bookmark and log in as **Max Taylor**. Max is not an administrator and he's not in the Development group.
      - **Note**: If you cannot log in to Jira as Max, you may not have completed an earlier lab. As the site administrator, navigate to his user page. Under Access, click the four buttons to give him access to the site and all the products on the site.
   d. If you see onboarding screens, skip the questions or select whatever options you like.
   e. Click **Search** and press **Return**.
   f. On the issue navigator, click the three dots on the top left of the page. You should not see an option for **Bulk change**. This confirms that Max does not have the ability to perform bulk change operations.
   g. Log out as Max.

Congratulations on completing the lab!

Lab 6 Appendix

Further Reading

Reference	**URL**
Managing global permissions	go.atlassian.com/cloudglobalperms

Best Practices

Pitfall	**Example Use Case**	**Best Practice**
Unknown public users can perform operations only Jira non-public users should be able to perform.	The Public group was assigned the Browse users and groups global permission by mistake. A malicious person was able to find out all the names of internal users at the company without even logging in.	You should be careful about using Public with Global Permissions, especially for public or production instances. The Public group grants the permission you've chosen to non-logged-in users

Lab 7 Jira Projects Overview

There is no lab for this module.

Lab 8 Creating & Configuring Company-Managed Projects

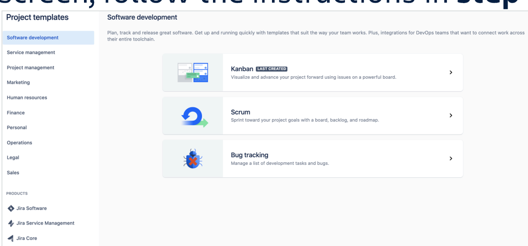
Lab 8 Exercise 1 Creating a project

> When you create a new project, you will be asked to create it in one of two ways. This is dependent on the environment version that you are logged into. For this reason, in the first part of the lab, you'll be offered two options for creating your project.

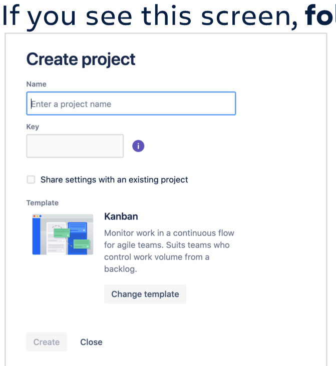
Create a company-managed project:

Teams in Space want a Kanban project to manage its development tasks.

1. Log in to your cloud site as the Jira administrator, **Dakota Jones**.
    a. If you're not already on the Project page, click **Projects** in the menu and select **View all projects**.
    b. In the menu click **Projects** then select **Create project**.
    c. If you see this screen then **follow the instructions in this step.** If you see a different screen, follow the instructions in **step 2.**



    d. Ensure **Software development** is selected in the sidebar.
    e. Select **Kanban.**
    f. Click **Use template**.
    g. Click **Select a company-managed project.**
    h. Name the project **Planets App.**
    i. Leave the key at **PA**.
    j. Leave **Share settings with an existing project** unchecked.
    k. Click **Create**.
2. If you see this screen, **follow the instructions in this step**:



a. Name the project **Planets App.**
b. Leave the key at **PA**.
c. Leave **Share settings with an existing project** unchecked.
d. If the Kanban template is not already selected, click Change template.
e. From the dropdown, select **Software**.
f. For the **Kanban** template, click **Select**.
g. Click **Create**.

Note on creating projects:

1. The key is used as the prefix of this project's issue keys. For example, your first issue's key will be PA-1. If there are multiple words in the project name, the key will be filled in with the first letter of each of the words in the name.
2. You can change the default project key that's created for you, but if you do, choose a key that's descriptive and easy to type. Users will often use the issue key to find an issue and you want to make it as easy as possible for them so don't use overly long keys. The key can be changed after project creation, but it's better to start off with a suitable one.
3. The Share settings with an existing project setting lets you share project configurations such as issue types, workflow, and more with other projects. If a change is made to one of the projects' configurations, that change affects all the projects that share that configuration.

Lab 8 Exercise 2 Edit Project Details

1. Click **Project settings** (or the cog icon) at the bottom of the project sidebar to access the project's settings pages.
    - **Note:** Jira has two types of administration pages – Jira administration and project settings pages. The Jira administration pages cover the whole Jira product. These you access from the cog icon (Settings) in the main menu or by typing '**.**' (period) or gg then the name of the page. The project settings pages only apply to the project.
2. On the project's **Details** page, click the current avatar or **select image** next to it.
3. In the project avatar dialog, click any icon.
    - **Note:** It's good to have an avatar that is representative of your project. If none of the supplied avatars suit your purposes, you can upload your own image.
4. Optionally enter a Description: **Manage work for Planets app**.
    - **Note:** The Description is optional, but is useful, especially if you have many projects.
5. For Project lead, start typing **sophie** and select **Sophie Nguyen**.
    - **Note:** The project lead is the person who manages the project within and outside Jira. By default, Jira assigns the person who created the project. We'll discuss project roles in more detail in the next module.
6. Leave Default Assignee as **Unassigned**.
7. Click **Save details**.
8. You should now see your new project avatar at the top of the project sidebar.

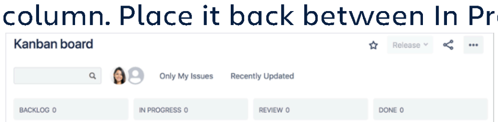
Lab 8 Exercise 3 Updating the Workflow for a Project

> ⓘ The default workflows for project templates are provided to you as a starting point. In many cases, they may be sufficient but often you'll need to modify them to suit your business needs.

1. Update the workflow by configuring the board:
    a. Click **Back to project** in the project sidebar and view the project's board.
        - **Note**: Each column on the board represents a status in the workflow – BACKLOG, SELECTED FOR DEVELOPMENT, IN PROGRESS, AND DONE.

    b. Click the three dots on the top right of the page and select **Board settings**.
        - **Note:** Here you can add, remove, reorder and rename columns (which are based on workflow statuses). Note it indicates this is a simplified workflow so issues can move from any column to any other column.
2. Teams in Space want to remove Selected for Development and add a Review column.
    a. Click **Columns**.
    b. In the Selected for Development column, click the **Delete icon**.
    c. In the Unmapped Statuses column, click **X** then **Remove** to delete the SELECTED FOR DEVELOPMENT status from the workflow.
    d. Click **Add column**:
        i. Name: **Review**
        ii. Category: **In Progress**
        iii. Click **Add**
            - **Note:** The Review column is added along with the REVIEW status (which already exists in Jira).

    e. Grab the grey dots at top of the Review column and see how you can move the column. Place it back between In Progress and Done.



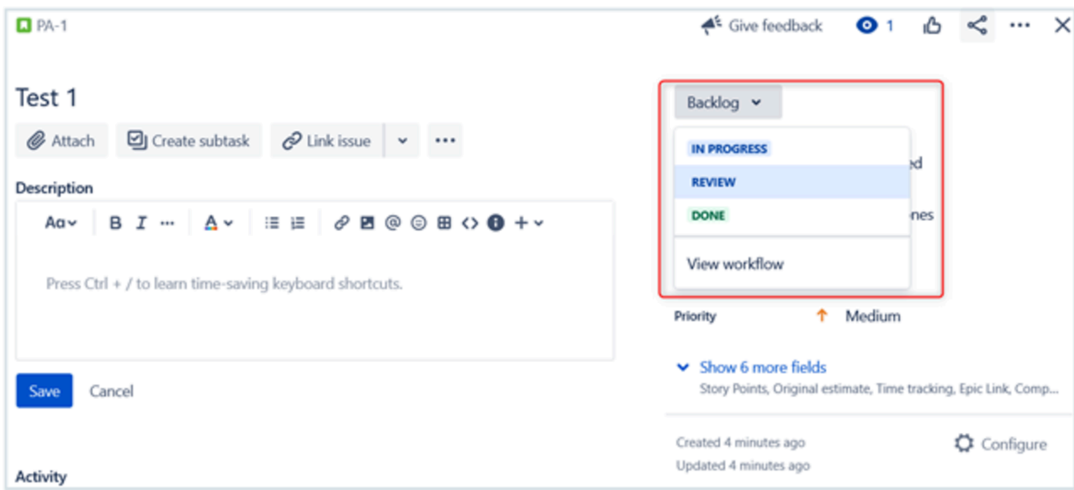
    f. Click **Back to board** and view the new workflow.
    g. **Create a new issue** in the Planets App project:
        i. Issue type: **Story**
        ii. Summary: **Test 1**
        iii. Click **Create**
        iv. Move the issue around on the board and confirm you can move it from any column to any other column.
3. Viewing the workflow:
    a. Go to project settings and click **Workflows** in the sidebar.
        - **Note:** In the project's workflow scheme, this workflow applies to all issue types in the project.

    b. Click **diagram** next to **Software Simplified Workflow for Project.**

- **Note:** Here you see a diagrammatic representation of the default workflow for this project.

c. Close the dialog.
d. Click the **Edit** icon under Actions.
   - **Note:** You can use the advanced workflow editor to edit workflows but this is typically done for more complex workflows that are not using the simplified workflow. We'll cover editing complex workflows in the Jira Administration Part 2 - Cloud course.

e. Don't make any changes here. Click **Discard Draft** then **Discard**.
f. Click **Back to project** to return to the project board.
g. Open your new issue.
h. Click the workflow status dropdown.
   - **Note:** You can also move issues through the workflow by selecting a new status here.



i. Click **View workflow**.
   - **Note:** When you have projects with more than one workflow, this is a quick way to see which workflow an issue is using.

j. Close the dialog then close the issue view.

Lab 8 Exercise 4 Updating Fields & Screens in a Project

View fields:

1. Navigate back to the **Planets App** project settings pages and view the **Fields** page.
    - **Note:** Field configurations define how fields behave, for example, whether they are required or optional, hidden or visible, etc. This field configuration is the system default field configuration (it applies to all the company-managed projects in Jira) and shows all the fields configured, their properties, and where they are used.
    - **Note:** If you edit this system default field configuration, it will apply to all company-managed projects by default!
    - **Question:** How many screens is the Assignee field used on?
    - **Answer**: You'll see the number of screens listed on the right. Click the link to see all the screens it's used on.
2. Scroll down and view the **Summary** field.
    - **Question:** Is Summary a required field?
    - **Answer**: The Summary field has a **Yes** in the Required column, so it is required.
3. Leave the fields at their default configuration.

Edit a screen:

We're going to:

- Edit the Create Issue screen for bugs
- Remove a field
- Move a field to a new location on the screen

But before we edit the screen, let's look at the default Create Issue screen.

1. Click **Back to project** at the top of the sidebar.
    a. Create an issue in the **Planets App** project:
        i. Select **Bug** issue type.
        ii. View all the fields that make up this screen.
        iii. Click **Create** before entering anything.
            - **Question:** What happened?
            - **Answer:** You got a message that you must specify a summary of the issue because this is a required field. Note the asterisk, which means it's required.
        iv. For Summary, enter **Test 2**.
        v. Scroll down and notice the **Labels** field (which we'll remove).
            - **Note:** It's a good idea to remove unused fields to simplify the screens and make them easier to use. Labels are useful, but we'll remove the labels field in this exercise as an example.
        vi. Click **Create**.
    b. Navigate to the project settings **Screens** page.

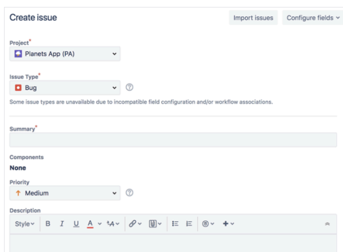
- **Note**: The Screens page shows you the Issue Type Screen Scheme for this project. It lists the two screens used for the issue types in this project. Note that the Bug issue type uses a different screen than the other issue types.

c. Click the **> icon** beside each screen scheme to expand them.
   - Note that in each screen scheme, all operations (create, edit, view) use the same screen (**PA: Kanban Bug Screen** for Bug issue types and **PA: Kanban Default Issue Screen** for all other issue types).

d. Click **PA: Kanban Bug Screen**.
   - **Note:** This took you to the Configure Screen page in Jira administration.

e. Hover over the **Labels** row and click **Remove**.

f. Test your screen changes by creating a new issue:
   i. Start to create a Bug in the **Planets App** project.
   ii. Confirm the **Labels** field is no longer there.



   iii. Change the issue type to **Story**.
   iv. Confirm you see the **Labels** field.
   v. For Summary, enter **Test 3,** then click **Create**.

Configure fields via the issue layout:

1. View the **Test 3 issue** you created in the previous step**.**
2. Click the **Configure cog icon** in the bottom right of the issue.
   - **Note:** Users with the Administrate Jira global permission or the administer projects project permission can move and hide fields via the issue layout page. The issue layout page is accessed from the **Configure cog icon** in an issue or the **Issue layout** link in the **Project settings sidebar**.
   - **Note:** The instructions asked you to create **Test 3** as a Story. This means you are now editing the **PA: Kanban Default Issue Screen** that is used by **Story issue types**.
3. In the issue layout page, drag the **Priority field** from the **HIDE WHEN EMPTY** section, so it sits directly under the **Description field** in the **Description fields** section of the issue layout page.
4. Click **Save changes**.

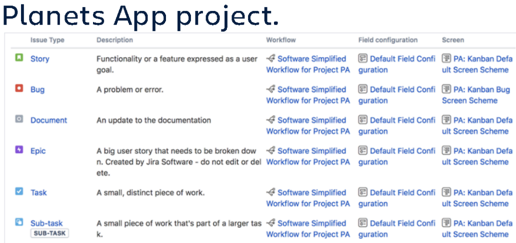
Confirm that the **Priority field** is under the **Description field**:

Note: When you move a field using the issue layout page, this impacts the Edit/View issue operations. The changes do not impact the Create issue operation. To confirm that changes made using the issue layout page have taken place, you must view an issue that has already been created.

1. Create a Story in the **Planets App** project.
2. For Summary, enter **Test 4,** then click **Create**.
3. Go to the board in the **Planets App's project**.
4. Click **Test 4** (or any other Story you have created) to view the issue.
5. Confirm that the **Priority field** is under the **Description field**.

Lab 8 Exercise 5 Adding an Issue Type to a Project

1. Return to the **Planets App** project.
   - **Note:** A quick way to get there is to click **Your work** and select Planets App.
2. Go to the project settings **Issue types** page.
   - **Note:** Here you see the issue types that come with the Kanban project template. You also see the workflow, field configuration, and screen scheme associated with each issue type.
     One of the team's responsibilities is to update the documentation when they make a change to the app. We'll create a new issue type for that.
3. Click **Actions** – **Edit issue types**.
   - **Note:** This takes you to the Modify Issue Type Scheme page for the project in Jira administration.
4. Click **+ Add issue type**:
   a. Name: **Document**
   b. Description (optional): **An update to the documentation**
   c. Type: **Standard Issue Type**
   d. Click **Add**
5. Click **Save**.
6. Confirm your new Document issue type is now listed in the current scheme for the Planets App project.



Issue Type	Description	Workflow	Field configuration	Screen
Story	Functionality or a feature expressed as a user goal.	Software Simplified Workflow for Project PA	Default Field Configuration	PA: Kanban Default Screen Scheme
Bug	A problem or error.	Software Simplified Workflow for Project PA	Default Field Configuration	PA: Kanban Bug Screen Scheme
Document	An update to the documentation	Software Simplified Workflow for Project PA	Default Field Configuration	PA: Kanban Default Screen Scheme
Epic	A big user story that needs to be broken down. Created by Jira Software - do not edit or delete.	Software Simplified Workflow for Project PA	Default Field Configuration	PA: Kanban Default Screen Scheme
Task	A small, distinct piece of work.	Software Simplified Workflow for Project PA	Default Field Configuration	PA: Kanban Default Screen Scheme
Sub-task SUB-TASK	A small piece of work that's part of a larger task.	Software Simplified Workflow for Project PA	Default Field Configuration	PA: Kanban Default Screen Scheme

   This new Document issue type is associated with the:
   a. **Software Simplified Workflow for Project PA** – any new issues created using this issue type in this project will follow this workflow. This is the one you edited earlier.
   b. **Default Field Configuration** – any new issues created using this issue type in this project will use the settings in this field configuration.
   c. **PA: Kanban Default Screen Scheme** – any new issues created using this issue type in this project will use the screens defined in this scheme.
      - **Note:** You can change the icon shown for an issue type by editing the issue type on the Issue types Jira administration page (under Issues).
7. Test the new issue type:
   a. Create a new issue for Planets App and select **Document** for the Issue Type.
      - **Question:** Why don't you see the Priority field above Description?
      - **Answer**: Because the changes you made earlier were only for the Bug issue type. This issue type is using the default screen scheme for all other issues in this project.
   b. Enter a Summary e.g. **Test 5** and click **Create**.

Congratulations on completing the lab!

Lab 8 Appendix

Further Reading

Reference	URL
Configuring projects	go.atlassian.com/cloudprojects

Best Practices

Pitfall	Example Use Case	Best Practice
Creating a long difficult to remember project key results in users getting frustrated because they cannot easily search for issues.	You created the key HMN_RSS for the new Human Resources project but users of this project are complaining because they can't remember the key to easily find issues.	You can change the default project key but if you do, choose a key that's descriptive and easy to type. Users will often use the issue key to find issues and you want to make it as easy as possible for them. Don't use overly long keys.
Can't find projects easily.	We have hundreds of projects but some of the names are very short and cryptic and they don't have descriptions, so we can't find the projects easily.	If you're going to have a lot of projects and a lot of project schemes, always use a descriptive name and add a description so you can easily see what each one is.

Screens that contain too many fields will make users frustrated and they'll skip filling out important fields.	Users are frustrated with filling out a long Create Issue screen as there are too many fields and they don't know what half of them are. So, they just leave most of them blank and you miss out on getting data on some of the important fields, so gadgets and reports don't work well.	Remove unused fields to help simplify the screens for users and make them easier to use.

Lab 9 Configuring Company-Managed Project Permissions

Lab 9 Exercise 1 Configuring Project Permissions

Lab 9 Appendix

Lab 9 Exercise 1 Configuring Project Permissions

> ⓘ The Planets App project lead wants only the members of the Development group to be able to create issues in the Planets App project. Members of other teams will only be able to view issues in this project.

1. View the default permission scheme:
    a. Log in to your cloud site as the Jira administrator, **Dakota Jones**.
    b. Navigate to the **Permission schemes** Jira administration page (under Issues) by using the cog icon or the **.** or **gg** shortcut.
        - **Note:** Here you see two permission schemes. The Default Permission Scheme is the default permission scheme for Business projects. The Default software scheme is the default permission scheme for Software projects. This scheme is associated with your Software project.
    c. Click to open the **Default software scheme**.
    d. Scroll down and view the default permissions.
        - **Note:** A permission scheme associates various permissions (for the project, issues, comments, etc.) with various roles, for example, the Administrators project role.
          Note that the Browse Projects project permission is assigned to Any logged in user. This means that any user who's logged in to Jira is allowed to see Software projects and the issues within it. The default permission schemes in Jira have an open approach to accessing the projects and issues. If your organization doesn't want to provide that much access to projects, as the Jira administrator, you could edit this scheme, but changes will apply to all new projects. The atlassian-addons-project-access role enables products that extend Jira to have permissions to do their work.
2. Copy the default permission scheme:
    a. Click the **Permission schemes** link above the name of the scheme to return to that page.
    b. In the **Default software scheme** row, click **Copy**.
    c. In the new **Copy of Default software scheme** row, click **Edit**:
        i. Name: **Dev Permission Scheme**
        ii. Description: **Permission scheme for Development projects.**
        iii. Click **Update**.
            - **Question:** As the Jira administrator, could we simply edit the Default software scheme to update the permissions for the Planets App project?
            - **Answer**: It depends. Any changes we make to this default scheme will be shared with all new Software projects that are created. If this is a change all Software projects will use, then you could edit the default scheme. However, if it's a change you think will only apply to this one

project (or to a subset of all Software projects) then you need to make a copy of the default scheme and edit the copy.
- **Note:** If you're going to have a lot of projects and a lot of project schemes, always use a descriptive name and add a description so you can easily see what each one is.

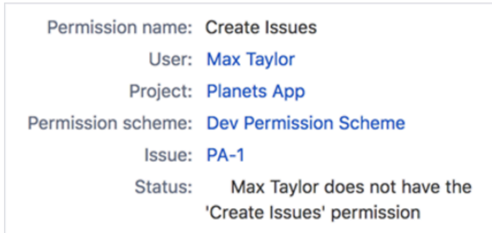
3. Update the permissions in the scheme:
   Now we'll update the permissions so that only users who belong to the Development group can create issues.
   a. Click **Dev Permission Scheme** to open the scheme.
   b. In the **Create Issues** permission row, click **Edit**.
      i. Click **Show more** and review the different roles, users, groups, etc. you can assign this permission to.
         - **Question:** Can you grant a permission to just the users of a particular Jira product?
         - **Answer**: Yes, you could. If you click Application access, then the drop-down you will see all the Jira products that you have subscribed to. The default, Any logged in user, means any user from any Jira product who's logged in. (Don't change the setting here.)

      ii. Click the radio button to select **Group** then select **Development** (the group you created earlier).
      iii. Click **Grant**.
      iv. In the Create Issues row, click **Remove**.
      v. Select **Application access – Any logged in user** and click **Remove**.
         - **Note:** You would also want to update other permissions such as Edit Issues, Assign Issues, Resolve Issues, etc. to fully protect the issues in this project. For this exercise, we'll just change Create Issues.

4. Associate new permission scheme with the project:
   a. Return to the **Permission schemes** page.
   b. Click **Planets App** under the Projects column to return to the project.
   c. In the Project settings sidebar click **Permissions**.
   d. Click the **Actions** drop-down and select **Use a different scheme**.
   e. Select the **Dev Permission Scheme** and click **Associate**.
   f. Confirm the name of the scheme is now **Dev Permission Scheme**.
5. Verify permissions:
   a. At the top of the Dev Permission Scheme page, click **Permission helper**.
      - **Note:** The Permission helper is very useful for verifying permissions or troubleshooting permission issues. You can also get to it by navigating to the **Permission helper** administration page (under System).

   b. Check the permission for a user who is *not* a member of the Planets App project:
      i. User: **Max Taylor**
      ii. Issue: Choose one of your Planets App test issues
      iii. Permission: **Create Issues**

iv. Click **Submit** and confirm he doesn't have the permission.



v. Check the Create Issues permission for a Planets App project member, **Luis Beck**.
   - **Note**: Just change the name and click **Submit**.
   - **Note:** He has the permission because he's a member of the Development group.

vi. Close the Permission helper dialog.

Congratulations on completing the lab!

Lab 9 Appendix

Further Reading

Reference	URL
Managing project permissions	go.atlassian.com/cloudprojectperms

Best Practices

Pitfall	Example Use Case	Best Practice
Permissions are being changed for all Software projects to meet the needs of one project that has different requirements than most.	I have a Software project with very specific requirements that are totally different from all other Software projects. I've updated the Default software scheme for that project, but I just realized that a lot of other projects use the Default software scheme.	The Default software scheme is used for any new Software project. So, any changes you make to this default scheme will be shared with all new Software projects that are created. If this is a change all Software projects will use, then you could edit the default scheme. However, if it's a change you think will only apply to this one project then you need to make a copy of the default scheme and edit the copy. Then associate the copy with the project and edit that.

Lab 10 Configuring Company-Managed Project Roles

Lab 10 Exercise 1 Assigning Project Roles

Lab 10 Exercise 2 Using Project Roles in Permission Schemes

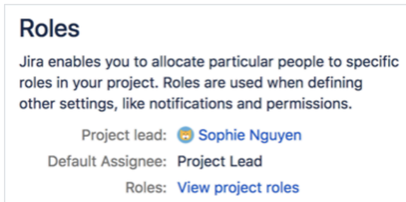
Lab 10 Exercise 3 (Optional) Viewing Project Role Usage

Lab 10 Appendix

Lab 10 Exercise 1 Assigning Project Roles

ⓘ For the Planets App project, the project administrator will be the project lead. We've already assigned Sophie Nguyen as the project lead. Note that Jira administrators can always administer projects.

1. Set the project administrator:
   a. Log in to your cloud site as the Jira administrator, **Dakota Jones**.
   b. Navigate to the **Planets App** project settings **People** page.
   c. Click **Add people**.
      i. Start typing **sophie** and select **Sophie Nguyen**.
      ii. Click the role dropdown and select **Administrators**.
      iii. Click **Add**.
         - **Note:**As a project administrator, Sophie can now update this project's details (name, description, avatar, and URL). She can also edit the project lead and project role memberships, change the project type, and define components and versions. She cannot however edit the project's schemes. Only the Jira administrator can do that. Managing project role membership is the most important responsibility of a project administrator.
2. Set the Default Assignee:
   a. Using your incognito window, go to your site bookmark and log in as **Sophie Nguyen**, the new project administrator.
      - **Note:** If you see onboarding screens, skip the questions or select whatever options you like.
      - **Note**: If you see a large blue sidebar and no top menu, click Sophie's avatar. Click **Try the new navigation** if you see this option. If you don't continue with the existing navigation.
   b. Navigate to the **Planets App** project settings.
   c. On the **Details** page, view the Default Assignee is Unassigned.
      - **Note:** When a new issue is created, if the assignee is not specified, the project's Default Assignee is used. You can either choose Project Lead or leave it as Unassigned. The Unassigned option is only available if the **Allow Unassigned Issues** setting in Jira's General configuration is set to ON (this is the default). Additionally, settings in the Component section of the project's configuration may override the Default Assignee for any issues that have the Component field set.
   d. For Default Assignee, select **Project Lead** and click **Save details**.
   e. Navigate to the **Summary** project settings page.
      - **Note:** You can also view who's the Project lead and the Default Assignee in the Roles section of the Summary page.



3. Optionally, verify the default assignee for the project:
   a. Log out as Sophie and log back in as **Luis Beck**, a member of the Development group.
      i. If you see onboarding screens, skip the questions or select whatever options you like.
      ii. If you see a large blue sidebar and no top menu, click Luis's avatar. Click **Try the new navigation** if you see this option. If you don't continue with the existing navigation.
      iii. Create an issue for the **Planets App** project e.g. Test 6.
      iv. Open the issue and verify the assignee is **Sophie Nguyen**.
      v. Log out as Luis.

Lab 10 Exercise 2 Using Project Roles in Permission Schemes

> ⓘ In the last lab, we updated the Dev Permission Scheme so only members of the Development group could create issues. The Jira administrator needs to create more projects where only the members of the project should be able to create issues. But instead of creating individual permission schemes for each project, we'll update the Dev Permission Scheme to use a project role instead of a group. That way, different users can be in the role in different projects so we can share the one permission scheme.

1. Create project role:
    a. Return to Dakota's window or log out and log back into your site as the Jira administrator, **Dakota Jones**.
    b. Navigate to the **Project roles** Jira administration page (under **System**).
        - **Note:** Here are the default project roles. We see the Administrators role for administrators in a project. There's also a role, atlassian-addons-project-access, that provides project permissions to apps (addons). You also see some roles associated with Jira Service Management projects.
          Notice the Manage Default Members link. When you create a project, Jira automatically will assign any default members to the project role. The default members can be users and/or groups.
    c. Scroll down to the **Add Project Role** section and enter:
        i. Name: **Members**
        ii. Optional Description: **This project role represents users who are members of a project and can create issues in the project**
        iii. Click **Add Project Role**.
        iv. Confirm the new **Members** role now appears on the page. We won't define any default members, as the members will be different for each project this is used in.
2. Update the permissions in the scheme:
   Now we'll update the permissions so that only users who belong to the Members role can create issues.
    a. Navigate to the **Permission schemes** Jira administration page (under Issues).
    b. Click to open the **Dev Permission scheme**.
    c. In the **Create Issues** row, click **Edit**.
        i. Click the radio button to select **Project Role.**
        ii. Select **Members** (the new project role you created earlier)
        iii. Click **Grant**.
        iv. In the **Create Issues** row, click **Remove**.
        v. Select **Group – Development** and click **Remove**.
            - **Note:** Now, the Jira administrator can associate this permission scheme with any project that has the same permission requirements.
3. Add users to a project role:

a. Using your incognito window, go to your site bookmark and log in as **Sophie Nguyen**, the project administrator, and project lead.
b. Navigate to the **Planets App** project settings **People** page.
c. Click **Add people**:
    i. Search for and select the members of this project **Sophie Nguyen** and **Luis Beck**.
    ii. From the Role drop-down, select your new role, **Members**.
    iii. Click **Add**.
    iv. Verify Luis is listed on the page with the new Members role, and Sophie now has two roles in the project – Administrators and Members.
    v. Click **Add people** again.
    vi. Cancel to close the dialog.
        - **Note:** You can enter an email address. If the site administrator set Existing users can send invitations to anyone to On in the Site access site administration page, then the project administrator can invite users to join the site and access the project. Even if this setting is Off, the project administrator can invite users in any approved domains here.

4. Optionally, verify project roles and permissions:
    a. Return to Dakota's window or log out and log back in as the Jira administrator, **Dakota Jones**.
    b. Open the **Permission helper** at the top of the **Dev Permission scheme** page or go to the **Permission Helper** Jira administration page (under System).
    c. Check the permission for a user who is *not* a member of the Planets App project.
        i. User: **Max Taylor**
        ii. Issue: Choose one of your Planets App test issues
        iii. Permission: **Create Issues**
        iv. Click **Submit** and confirm he doesn't have the permission.
        v. Check the Create Issues permission for a Planets App project member, **Luis Beck**. He has the permission because he's a member of the Members project role in the project.

Lab 10 Exercise 3 (Optional) Viewing Project Role Usage

1. As the Jira administrator, Dakota Jones, navigate to the **Project roles** Jira administration page (under **System**).
2. If you have project roles that are used in multiple projects and schemes, it's good to be able to see which projects and schemes they're used in. For the **Members** role, click the **View Usage** link.
3. Here you can see that the Members project role is used in the Dev Permission scheme, which is associated with the Planets App project. In the **Project Role Members Per Project** column, click **View,** and it takes you to the People page in the project where you can see the role members.

Congratulations on completing the lab!

Lab 10 Appendix

Further Reading

Reference	URL
Managing project roles	go.atlassian.com/cloudprojectroles

Best Practices

Pitfall	Example Use Case	Best Practice
Issues are getting assigned to the wrong person and aren't being seen by the project team.	The default assignee for the Pluto app project was set up as the Project Lead. However, the person who was the Project Lead left the team and is working on another project. However, the Project Lead was never changed so issues are still being automatically assigned to her.	It's important to set both the Project Lead and Default Assignee correctly for your project. The Default Assignee controls who is tasked with a new issue when it's created.
Assigning users or groups to permission or notification schemes means you need more schemes, which incurs more administrative overhead and possible performance degradation.	I've created copies of the Default Notification Scheme for each of my new projects and I've updated each scheme adding just the users for each of the projects. But it's a lot of work to do this and keep them all maintained. And I've noticed performance is not as good as it was.	Use roles in permission and notification schemes. While you could assign permissions and notifications to users and groups directly, roles are more flexible and sustainable. Also, when you use roles you can delegate some administrative tasks to the project administrator – they can add their users to their project roles.

Lab 11 Creating & Configuring Team-Managed Projects

In this lab, you log in as a development team member and perform the following tasks:

- Create a team-managed (formerly next-gen) Software project
- Control access to a project
- Add issue types
- Add fields for issue types
- Configure the board
- Customize project features

Lab 11 Exercise 1 Creating a Team-Managed Project

Lab 11 Exercise 2 Managing Access in Team-Managed Projects

Lab 11 Exercise 3 Adding & Configuring Issue Types

Lab 11 Exercise 4 Configuring the Board & Customizing Features

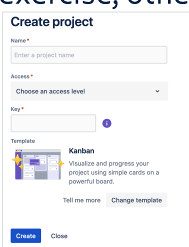
Lab 11 Appendix

Lab 11 Exercise 1 Creating a Team-Managed Project

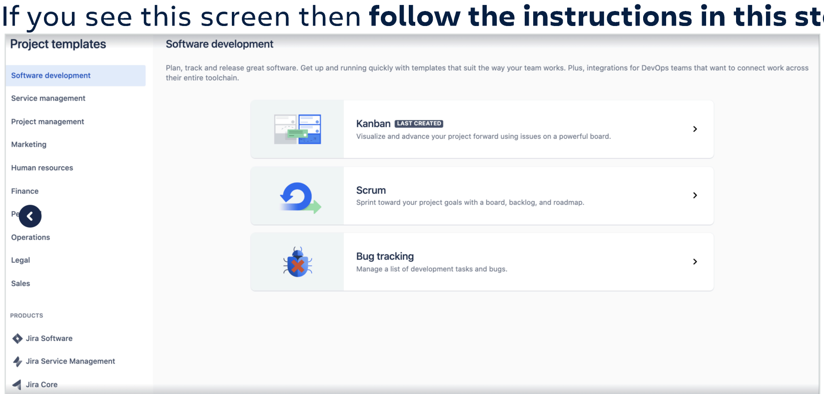
> When you create a new project, you will be asked to create it in one of two ways. This is dependent on the environment version that you are logged into. For this reason, in the first part of the lab, you'll be offered two options for creating your project.

1. Create a team-managed Software project:
   a. Log in to your cloud site as a developer, **Max Taylor**.
      - **Note:** If you cannot log in to Jira as Max, you may not have completed an earlier lab. As the site administrator, navigate to his user page. Under Access, click the four buttons to give him access to the site and all the products on the site.

   b. If you're not already on the Project page, click **Projects** in the menu and select **View all projects**.
2. If you see this screen, **follow the instructions in this step** then you're done with this exercise, otherwise, **skip to step 3**:



   a. Name the project: **Galaxy App**
   b. Project access: **Open**
   c. Leave the key as **GA**.
   d. Click **Create**.
3. If you see this screen then **follow the instructions in this step**:



   a. Select **Kanban.**
   b. Click **Use template.**
   c. Click **Select a team-managed project.**
   d. Name the project: **Galaxy App.**

e. Project access: **Open.**
f. Leave the key as **GA**.
g. Click **Create**.

Lab 11 Exercise 2 Managing Access in Team-Managed Projects

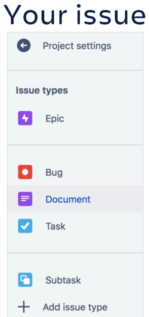
1. Control who can work in the project:
    a. Click **Project settings** then **Access**.
        - **Note:** Max has the role of Administrator as he created the project. And as the project has open access, you see a message saying, “Anyone with access to the "nameofyoursite" Jira site can search for, view, create and edit this project's issues”. These users automatically have the role of Member. You don't need to specifically add people to roles in this project as people with access to the site can already perform most of the required functions.

    b. Max's team decide that only users of Jira Software should be able to create and edit issues in their project.
        i. Click **Change project access**.
        ii. Select **Limited**.
        iii. Click **Change** then **Save and make limited**.
            - **Note:** Now anyone with access to the site has the role of Viewer. This means that anyone who has access to your site will be able to search for, comment on and view the issues in your project. To add users who can add and edit issues, we need to add users or groups and assign them the role of member.

        iv. Click **Add people**.
        v. Start typing **jira** and select the **jira-software-users** group.
        vi. Select the role, **Member**.
        vii. Click **Add**.
            - **Question:** What can a licensed user who's not a member of the jira-software-users group do in this project?
            - **Answer**: A user who's not in the jira-software-users group can search for and view issues in this project.

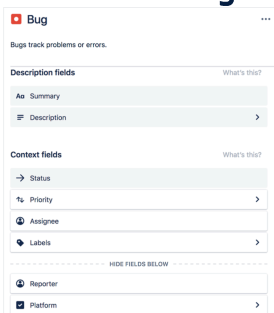
Lab 11 Exercise 3 Adding & Configuring Issue Types

1. Add issue types:
    a. Navigate to the **Galaxy App** project settings **Issue types** page.
        - Question: What are the default issue types for this Kanban project?
        - **Answer**: This Kanban project has the Epic, Task, and Subtask issue types by default. They are listed in the sidebar.
2. The team also needs to track bugs. Click **Add issue type** in the sidebar.
    a. Bug is one of the suggested issue types and is already selected. Click **Add**.
        - **Note:** One of the team's responsibilities is to update the documentation when they make a change to the app. We'll create a new issue type for that.
3. Click **Add issue type**.
    a. Click **Create issue type**.
    b. Name: **Document**
    c. Optional description: **An update to the documentation**.
    d. Click **Change icon** then **…** and select the purple one with lines (or another one if you wish).
    e. Click **Select**.
    f. Click **Create**.
    g. Your issue types should look like this:

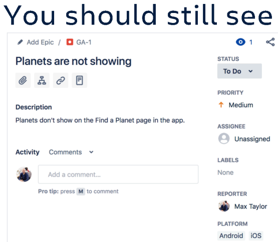


4. Add fields to an issue type:
    a. Click the **Bug** issue type.
    b. On the right, click **Priority**. It's placed in the Context fields area above the HIDE FIELDS BELOW line.
        - Fields below the HIDE FIELDS BELOW line remain hidden in the issue if they don't contain a value. Once they have a value they appear on the issue. You can always show hidden fields by clicking Show more on the issue.
5. Grab the new **Priority** field and drag it around. Place it between Status and Assignee.
    a. Create a new custom field to track platform. On the right, click **Checkbox**:
        i. Field name: **Platform**
        ii. Optional description: **Choose which platform the bug appears on**
        iii. Highlight **Option 1** text and replace it with **Android**
        iv. Add another option, **iOS**
    b. Collapse **Platform** field details (click down arrow).

c. Drag the new **Platform** field to beneath **Reporter** in the **HIDE FIELDS BELOW** section.
d. Click **Save changes**.



6. Test the new issue type:
   a. Create a new issue in the **Galaxy App** project of type **Bug**:
      i. Add a Summary e.g. **Planets are not showing**.
      ii. Optional Description: **Planets don't show on the Find a Planet page in the app**.
      iii. Scroll down and ensure you see the **Priority** field. Change it if you wish.
      iv. Scroll down and ensure you see the **Platform** field. Leave both options unchecked.
      v. Click **Create**.
   b. Open your new bug issue.
      - Do you see the Platform field? If not, why not?
      - **Answer**: You don't see the Platform field because it doesn't have a value.
7. Click **Show 1 more field**.
   a. Click in the Platform field and select both **Android** and **iOS**.
   b. You should still see the field as it now has values.



Lab 11 Exercise 4 Configuring the Board & Customizing Features

1. Add a new column to the project board:
    a. Click **Board** in the project sidebar.
    b. Click the **<** at the top of the project sidebar or enter **[** to collapse the project sidebar.
    c. Add a review step in their work process (workflow). Click **+** to the right of the Done column.
        i. Name the new column **Review**.
        ii. Click **Return** or the tick sign.
    d. Grab the top of the column and drag it to just before DONE.
2. Customize project features:
    a. Expand the project sidebar and note the options in the sidebar.
    b. Go to the project settings **Features** page.
        - Note: Max's team has grown, and they want to start using scrum with sprints instead of Kanban. They also want to track their performance with reports.
    c. Select **Backlog**, **Sprints**, **Reports**, and **Estimation**.
    d. Return to the project and note the project sidebar now has Backlog and Reports.
    e. Go to the **Backlog** and you now see an area to create sprints at the top of the page.

Note: With next-gen projects, you can customize the features in your projects regardless of what type of project template you started with.

Congratulations on completing the lab!

Lab 11 Appendix

Further Reading

Reference	**URL**
Manage and administer team-managed projects	go.atlassian.com/manage-and-administer-team-managed-projects
Overview of permissions in team-managed projects	go.atlassian.com/team-managed-permissions
Customize an issue's fields in team-managed projects	go.atlassian.com/customize-an-issues-fields-in-team-managed-projects

Best Practices

Pitfall	Example Use Case	Best Practice
Creating a long difficult to remember project key results in users getting frustrated because they cannot easily search for issues.	You created the key HMN_RSS for the new Human Resources project but users of this project are complaining because they can't remember the key to easily find issues.	You can change the default project key but if you do, choose a key that's descriptive and easy to type. Users often use the issue key to find issues and you want to make it as easy as possible for them. Don't use overly long keys.

Screens that contain too many fields will make users frustrated and they'll skip filling out important fields.	Users are frustrated with filling out a long Create Issue screen as there are too many fields and they don't know what half of them are. So, they just leave most of them blank and you miss out on getting data on some of the important fields, so gadgets and reports don't work well.	Remove unused fields to help simplify the screens for users and make them easier to use.