MANUAL PRINCIPIOS BÁSICOS DE JIRA

Versión 1.0
2011-09-30

Detailed Document Change History

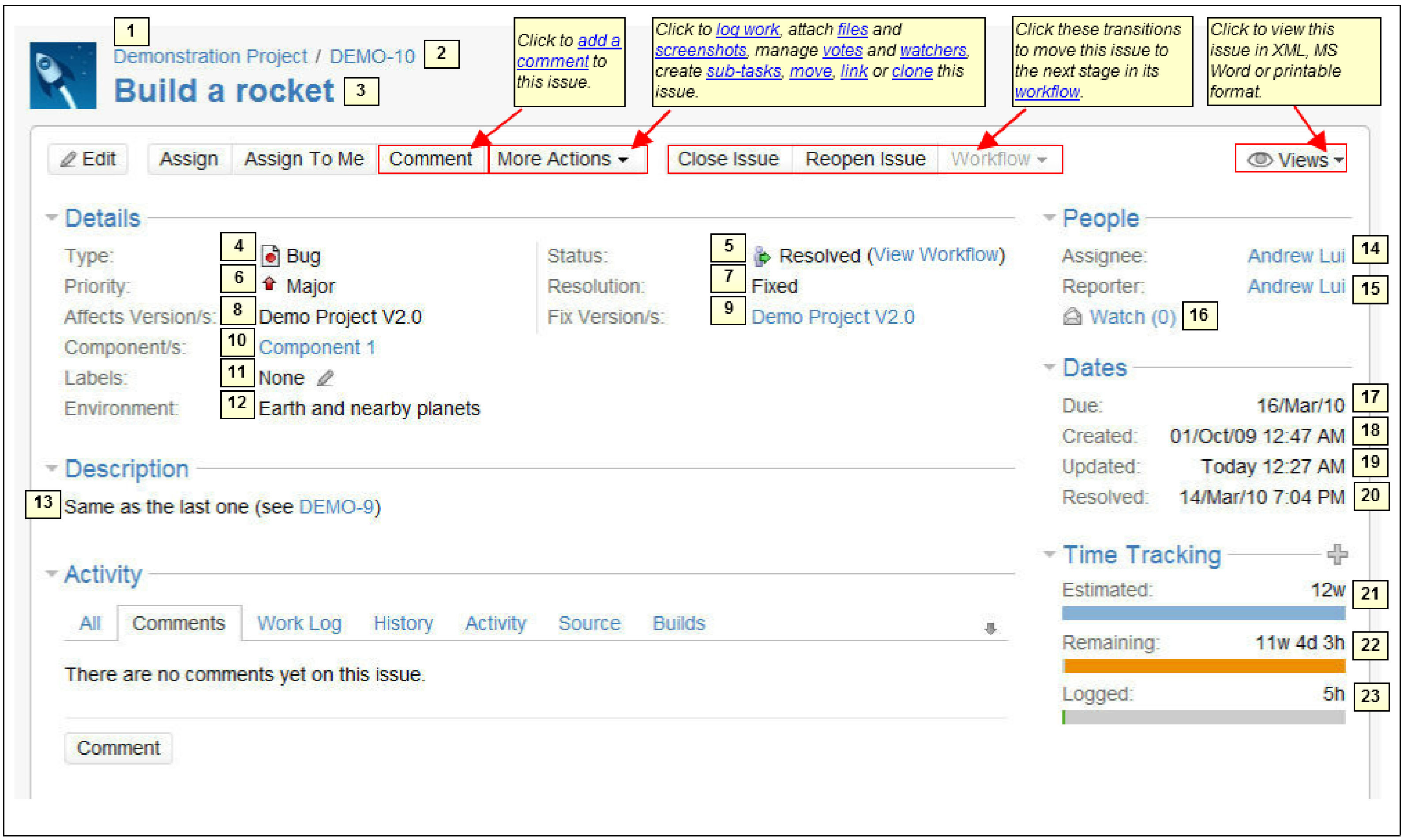
Version	Date	Author	Description
1.0	2011-09-30	Adriana Chavarría	Initial Draft

CONCEPTS

1 What is an Issue

Different organisations use JIRA to track different kinds of issues. Depending on how your organisation is using JIRA, an issue could represent a software bug, a project task, a helpdesk ticket, a leave request form, etc.

A JIRA issue typically looks like this:



Your JIRA issues may look different to the above screenshot if your administrator has customised JIRA for your organisation.

The numbered fields shown in the above screenshot are:

1. **Project** — the 'parent' project to which the issue belongs.
2. **Key** — a unique identifier for this issue. (The characters to the left of the hyphen represent the project to which this issue belongs.)
3. **Summary** — a brief one-line summary of the issue.
4. **Type** — see below for a list of types.
5. **Status** — the stage the issue is currently at in its lifecycle ('workflow'). See below for a list of statuses.
6. **Priority** — the importance of the issue in relation to other issues. (See below for a list of priorities).
7. **Resolution** — a record of the issue's resolution, if the issue has been resolved or closed. (See below for a list of resolutions).
8. **Affects Version(s)** *(if applicable)* — project version(s) for which the issue is (or was) manifesting.
9. **Fix Version(s)** *(if applicable)* — project version(s) in which the issue was (or will be) fixed.
10. **Component(s)** *(if applicable)* — project component(s) to which this issue relates.
11. **Labels(s)** *(if applicable)* — labels to which this issue relates.
12. **Environment** *(if applicable)* — the hardware or software environment to which the issue relates.
13. **Description** — a detailed description of the issue.
14. **Assignee** — the person to whom the issue is currently assigned.
15. **Reporter** — the person who entered the issue into the system.
16. **Watchers** — the number of people who are watching this issue.
17. **Due** *(if applicable)* — the date by which this issue is scheduled to be completed.
18. **Created** — the time and date on which this issue was entered into JIRA.
19. **Updated** — the time and date on which this issue was last edited.

20. **Resolved** — the time and date on which this issue was resolved.
21. **Estimate** — the **Original Estimate** of the total amount of time required to resolve the issue, as estimated when the issue was created.
22. **Remaining** — the **Remaining Estimate**, i.e. the current estimate of the remaining amount of time required to resolve the issue.
23. **Logged** — the sum of the **Time Spent** from each of the individual work logs for this issue.

Some of the most important fields — 'Type', 'Priority', 'Status' and 'Resolution' — are described as follows:

Issue Type

JIRA can be used to track many different types of issues. The default types are listed below, but please note that your JIRA administrator may have customised this list to suit your organisation.

Bug — A problem which impairs or prevents the functions of the product.

Improvement — An enhancement to an existing feature.

New Feature — A new feature of the product.

Task — A task that needs to be done.

Custom Issue — A custom issue type, as defined by your organisation if required.

Priority

An issue's priority indicates its relative importance. The default priorities are listed below; note that both the priorities and their meanings can be customised by your JIRA administrator to suit your organisation.

Blocker — Highest priority. Indicates that this issue takes precedence over all others.

Critical — Indicates that this issue is causing a problem and requires urgent attention.

Major — Indicates that this issue has a significant impact.

Minor — Indicates that this issue has a relatively minor impact.

Trivial — Lowest priority.

Status

Each issue has a status, which indicates where the issue currently is in its lifecycle ('workflow'). An issue starts as being 'Open', then generally progresses to 'Resolved' and then 'Closed'; or, depending on circumstances, it may progress to other statuses. Please also note that your JIRA administrator may have customised the available statuses to suit your organisation.

Open — This issue is in the initial 'Open' state, ready for the assignee to start work on it.

In Progress — This issue is being actively worked on at the moment by the assignee.

Resolved — A Resolution has been identified or implemented, and this issue is awaiting verification by the reporter. From here, issues are either 'Reopened' or are 'Closed'.

Reopened — This issue was once 'Resolved' or 'Closed', but is now being re-examined. (For example, an issue with a *Resolution* of 'Cannot Reproduce' is Reopened when more information becomes available and the issue becomes reproducible). From here, issues are either marked *In Progress, Resolved* or *Closed.*

Closed — This issue is complete.

Resolution

An issue can be resolved in many ways, only one of them being 'Fixed'. The default resolutions are listed below; note that your JIRA administrator may have customised these to suit your organisation.

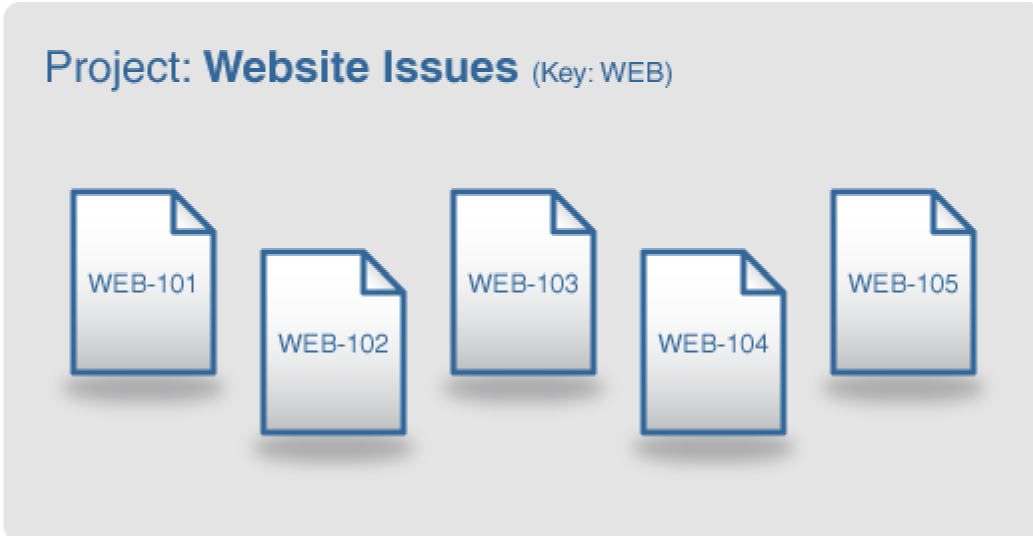
Fixed — A fix for this issue has been implemented.
Won't Fix — This issue will not be fixed, e.g. it may no longer be relevant.
Duplicate — This issue is a duplicate of an existing issue. Note: it is recommended you create a link to the duplicated issue.
Incomplete — There is not enough information to work on this issue.
Cannot Reproduce — This issue could not be reproduced at this time, or not enough information was available to reproduce the issue. If more information becomes available, please reopen the issue.
Note that once an issue has been resolved (that is, the issue's Resolution field is not empty), textual references to that issue will show the key in strikethrough text.

2 What is a Project

A JIRA project is a collection of issues, and is defined according to your organisation's requirements. For example, a JIRA project could be:

- a software development project
- a marketing campaign
- a helpdesk system
- a leave request management system
- a website enhancement request system

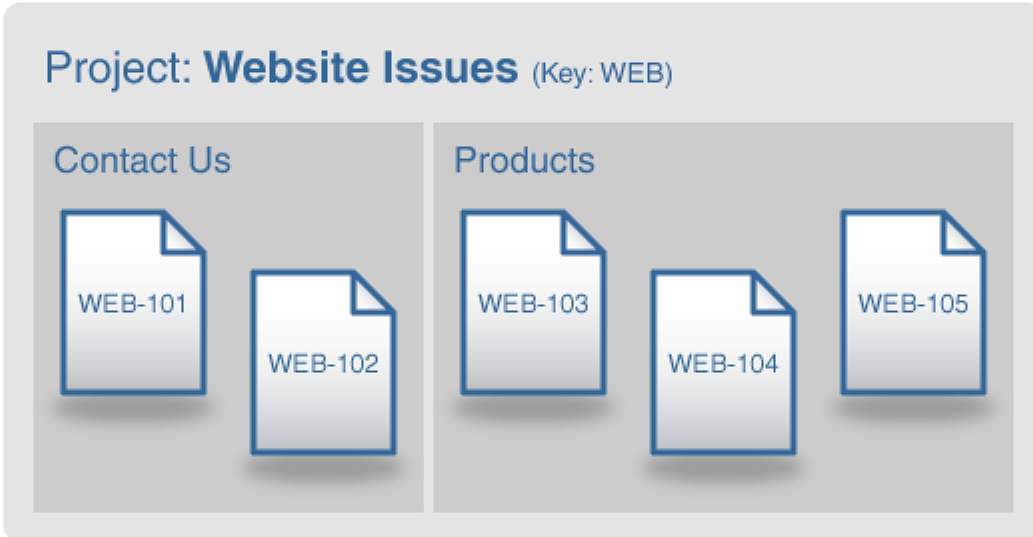
Every issue belongs to a project. Each project has a *name* (e.g. **Website Issues**) and a *key* (e.g. **WEB**). The project key becomes the first part of that project's *issue keys,* e.g. **WEB-101, WEB-102,** etc:



What is a component?

A project component is a logical grouping of [issues]() within a project. Each project may consist of various components (or none), depending on your organisation's needs.

For example, a software development project could consist of components called 'Documentation', 'Backend', 'Email Subsystem', 'GUI'. A website enhancement request system might consist of components called 'Products', 'Contact Us', etc:



An issue can belong to zero, one or multiple components within a project.

What is a version?

For some types of projects, particularly software development, it is useful to be able to associate an issue with a particular project *version* (e.g. 1.0 beta, 1.0, 1.2, 2.0).
Issues have two fields that relate to versions:

- **Affects Version(s)** — this is the version(s) in which the issue is manifesting. For instance, a software bug might affect versions 1.1 and 1.2.
- **Fix Version(s)** — this is the version(s) in which the issue was (or will be) fixed. For instance, the bug affecting versions 1.1 and 1.2 might be fixed in version 2.0. Note that issues which do not have a **Fix Version** are classified as 'Unscheduled', as shown in the screenshot above.

Versions can be in one of three states: **Released, Unreleased** or **Archived.** Versions can also have a *Release Date,* and will automatically be highlighted as 'overdue' if the version is Unreleased when this date passes.

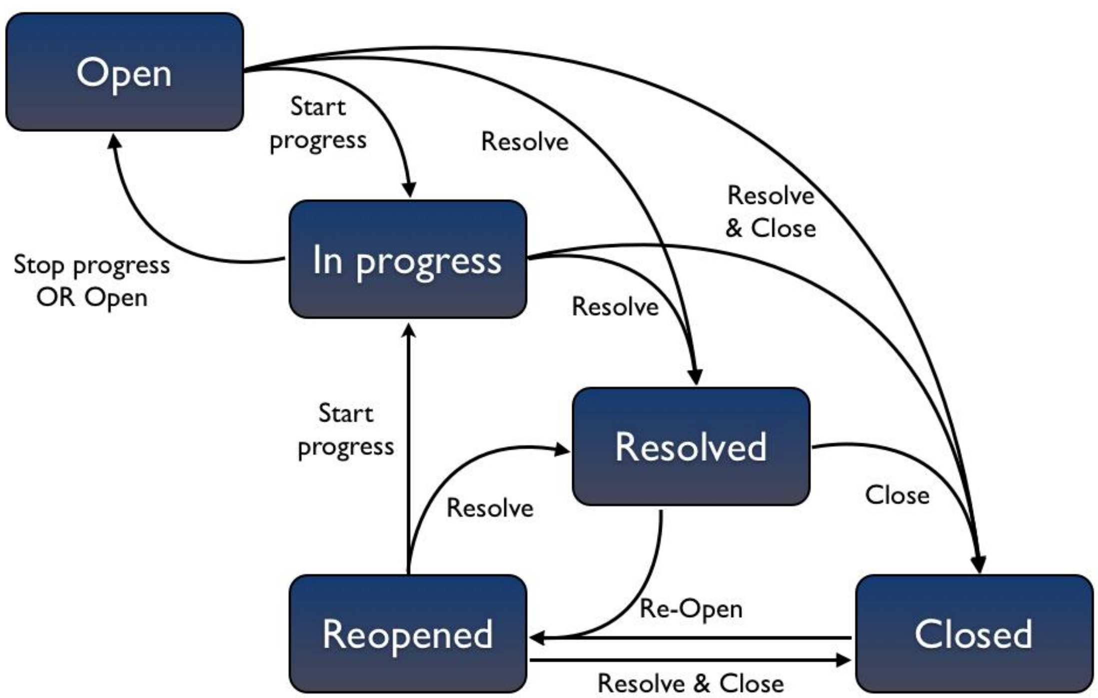
Additional Resources

- See 'Browsing a Project' for information on looking up a project's structure and issues.
- See the *JIRA Administrator's Guide* for information on defining projects, components and versions.

3 What is Workflow

Workflow is the movement (or **transition**) of an issue through various **Statuses** during its lifecycle.
The following diagram shows JIRA's default workflow, where:

- each **status** is represented by a blue box
- each **transition** is indicated by an arrow.



JIRA's workflow can also be customised by your JIRA administrator

GETTING STARTED

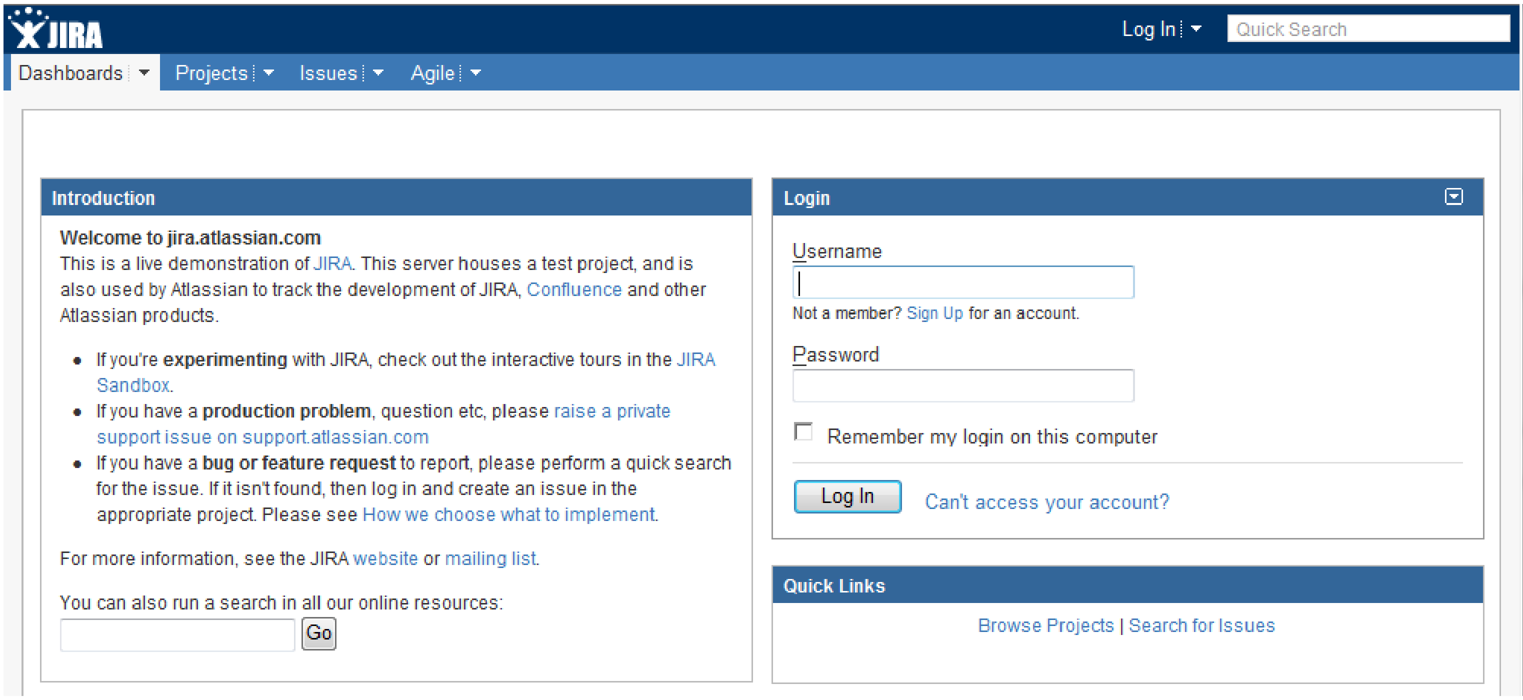
1 Logging in to JIRA

Many JIRA instances will have permissions implemented that restrict issues and issue actions to certain users and user groups. Some JIRA instances may not permit anonymous access. In these scenarios, you will be prompted to log in to JIRA.

The **Login** panel will be displayed if you have not logged in to JIRA. There are three things you can do here:

1. **Log into JIRA:** To log in to JIRA, enter your **'Username'** and **'Password'** and click the **'Log In'** button.
   *Selecting the **'Remember my login on this computer'** check box will prevent you from being automatically logged out of JIRA. However, your session will not be preserved, e.g. last search, current project, etc.*
2. **Reset your password:** To reset your password, click the **'Forgot Password'** link. The reset password page will display. Enter your **'Username'** and a new password will be emailed to the email address specified in your JIRA user profile. If you have forgotten your email address, you will need to contact your JIRA administrator for help.
3. **Sign up for an account:** If you do not have a user account and your JIRA administrator has enabled public signup, you can create your own user account by clicking the **'Sign up'** link in the 'Not a member? Sign up for an account' text. Enter your details and click the **'Sign up'** button to create your account.

Please note that your JIRA screen may look different from the following screenshot as the dashboard and colours may have been customised by your JIRA administrator. The links, however, will be the same.

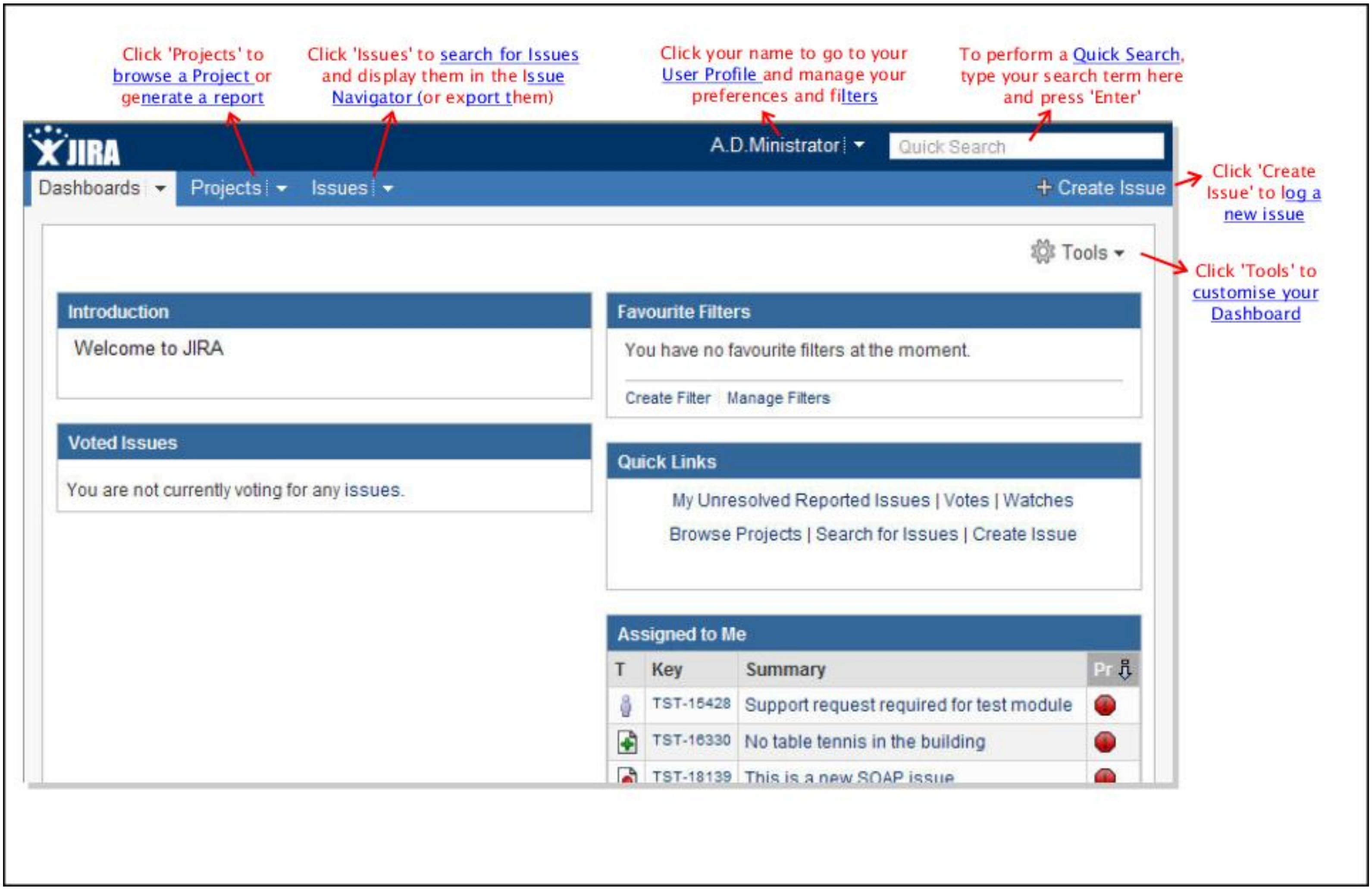


2 Exploring the JIRA Workspace

The **Dashboard** is the first screen you see when you login to JIRA.

- The navigation bar (at the top of the screen) is the same on every screen in JIRA. It contains links which give you quick access to many of JIRA's most useful functions.

- The white area of the screen, below the top navigation bar, can be customised to display 'gadgets' showing many different types of information, depending on your areas of interest.



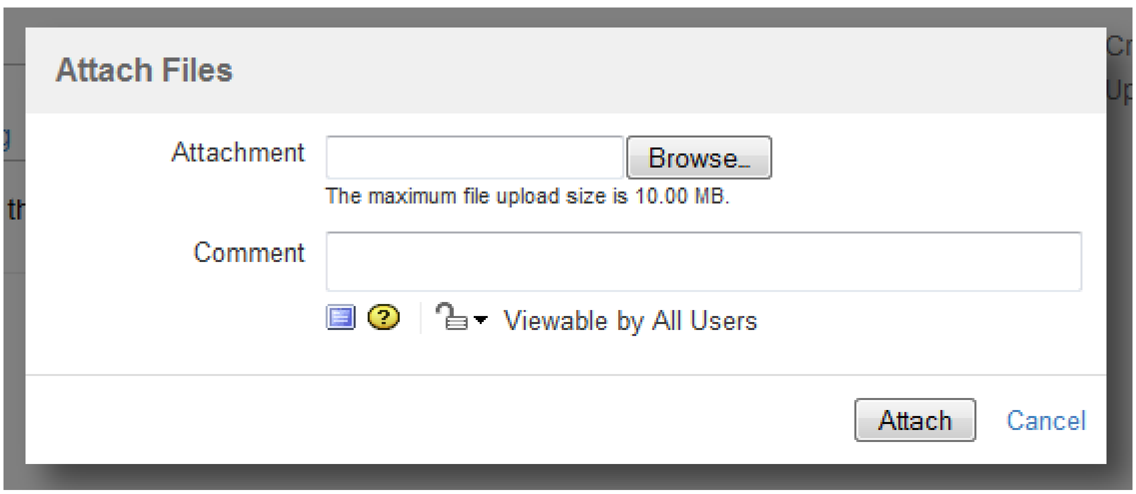
Please note that your JIRA screen may look different from this screenshot, as the logo and colours may have been customised by your JIRA administrator. The links in the navigation bar, however, will be the same.

WORKING WITH ISSUES

Attaching a File

To attach a file to a JIRA issue:

1. Open the JIRA issue to which you wish to attach a file.
2. From the **More Actions** menu, select **'Attach File'**.
3. The **'Attach Files'** dialog box will appear:



4. Click the '**Browse**' button to search for your files.

You can attach more than one file at a time: after you select a file, it will appear at the top of the **Attach Files** dialog box, followed by each subsequent file you add via the **Browse** button.

If you use Firefox 3.6 or later or Chrome browsers, you can select multiple files in the browser dialog box which appears after clicking the '**Browse**' button.

If you select a file by mistake, clear its check box to prevent the file being attached to the issue.

By default, the maximum size of any one file is 10MB, although this limit can be customised by your JIRA administrator. See Configuring File Attachments for more information

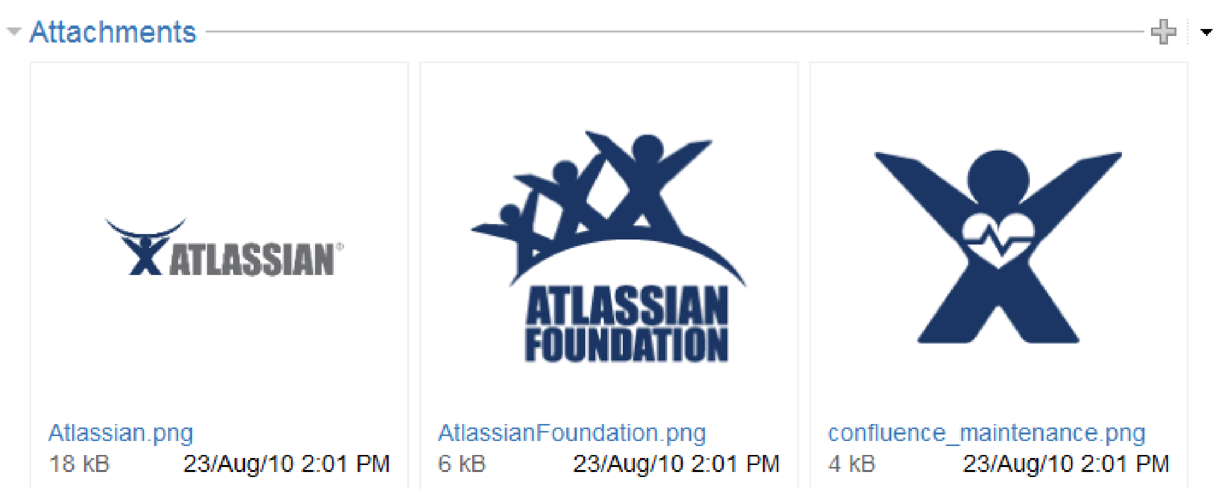
File names cannot contain any of these characters: '\', '/','\"', '%', ':', '$', '?', '*'.

5. (Optional) Enter a comment about the files(s) you are attaching.
   If you enter a comment, then you can also set the security level for the comment by selecting the appropriate value from the padlock icon dropdown. The security level for the comment is 'All Users' by default.
6. Click the '**Attach**' button. All selected files will be attached to the issue.

Viewing an Image Gallery

By default, JIRA displays image files (ie. GIFs, JPGs, PNGs) attached to an issue, including any screenshots, as 'thumbnails' on the issue.

Screenshot: Viewing attached image files on an issue



ℹIf your JIRA administrator has disabled **Thumbnails** in JIRA's Attachment Settings, then JIRA will not display thumbnails of image files on an issue and instead, they will be part of the list of attached files.

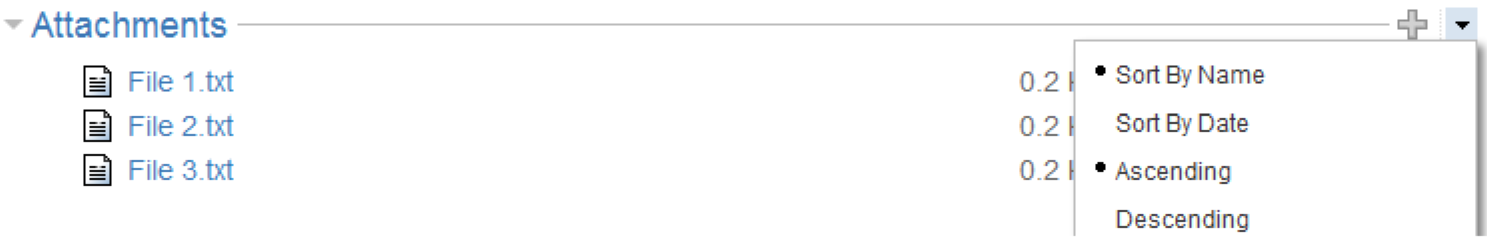
You can click on an image's thumbnail to preview a larger version of it in a popup. If multiple images are attached to an issue, click the left and right arrows at the sides of an image preview to see previews of the adjacent attached images.

Screenshot: Previewing attached image files on an issue

Sorting Attachments

You can sort the list of attachments on JIRA issues in ascending or descending order according to the attachment file name or date of attachment to the issue. To do this:

1. Open a JIRA issue with attachments.
2. Click the down-arrow icon to the right of the **Attachments** section and select the required sort criteria or order options provided in the list.

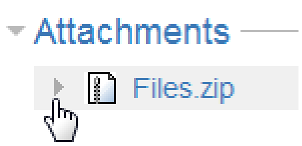


Your final sort criteria and order options will also apply to image thumbnails and all subsequent issues viewed.

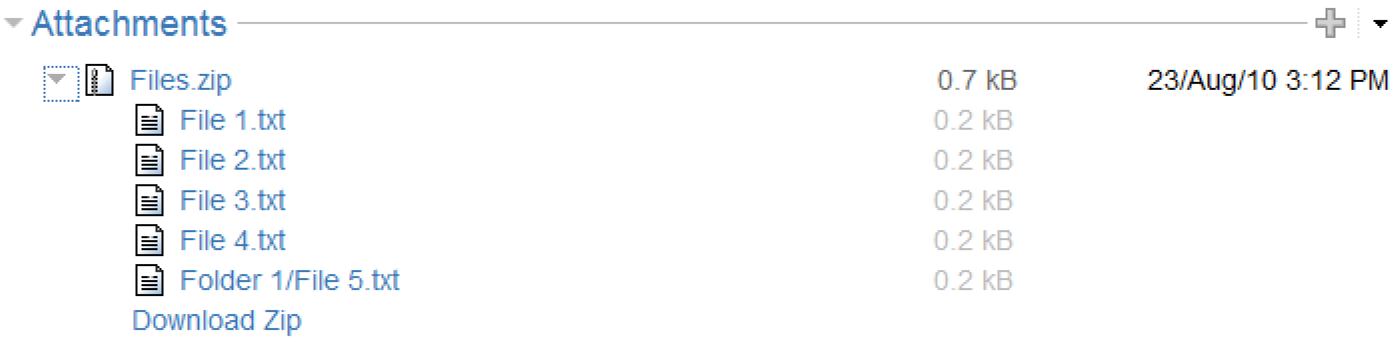
Accessing ZIP-format File Contents

When viewing an issue, JIRA allows you to browse and access the contents of any ZIP-format file (such as those with a '.zip' or '.jar' file name extension) attached to an issue.
To browse the contents of a zipped attachment and access its files:

1. Open a JIRA issue with an attached zipped file.
2. Click the right-arrow icon to the left of the zipped file's name.



3. The contents of the zipped file are listed. From this expanded list, you can access the zipped file's individual files by clicking their linked names or you can download the whole zipped file in its entirety by clicking the **Download Zip** link.



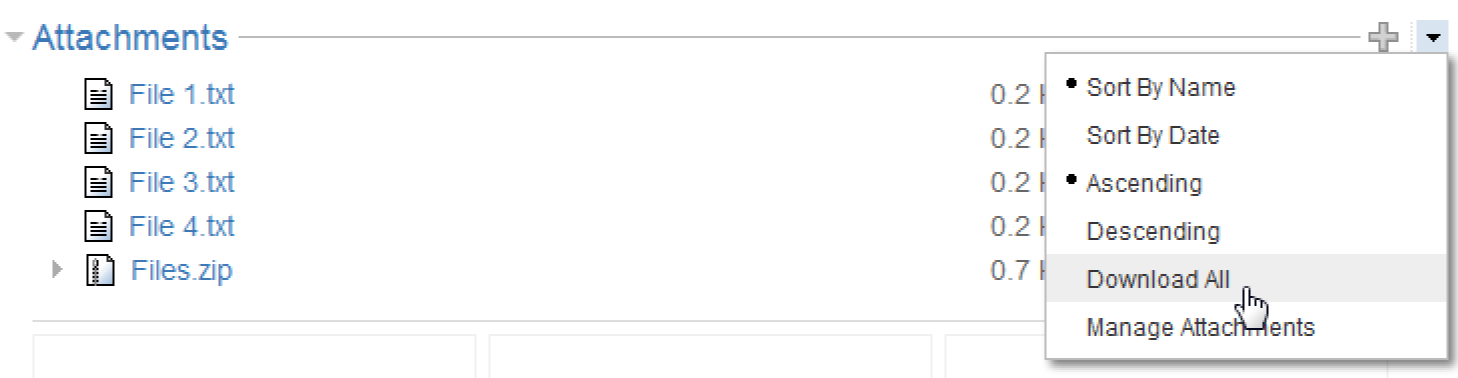
If a file is located within a subdirectory of the zipped file, then the path to that file is indicated in the content of the zipped file. For example, the content of **Files.zip** listed in the screenshot above shows that **File 5.txt** is located within the **Folder 1** subdirectory of **Files.zip**.

If your JIRA administrator has disabled **ZIP support** in JIRA's Attachment Settings, then this feature will not be available and you must download the zip file to your computer before accessing its individual files.

Exporting All Attachments as a ZIP File

To download all the files attached to an issue (including any screenshots) as a single ZIP file:

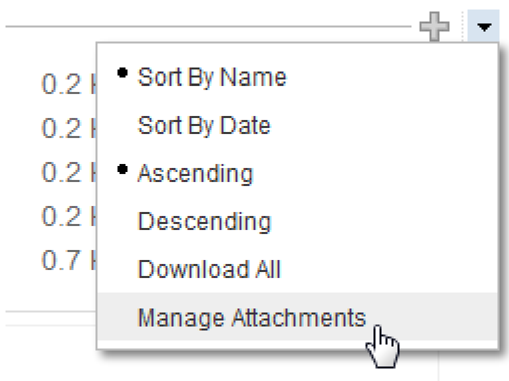
1. Open the JIRA issue from which you wish to export all attachments as a zip file.
2. Click the down-arrow icon to the right of the **Attachments** section and select '**Download All**' from the dropdown menu.



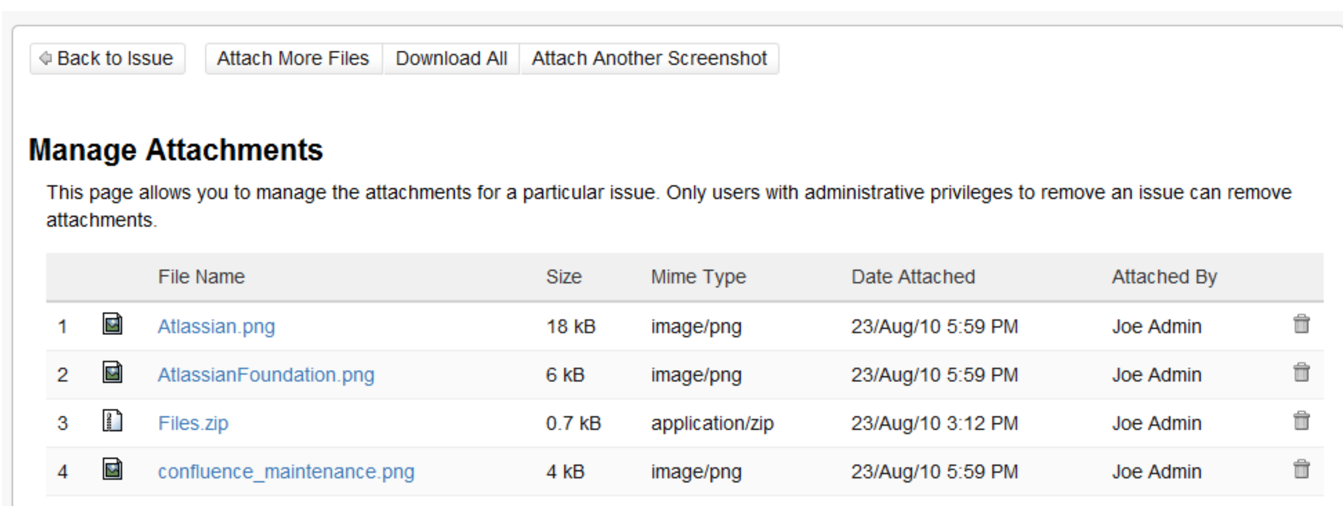
Removing a File Attachment from an Issue

To remove a file attachment from a JIRA issue:

1. Open the JIRA issue from which you wish to remove a file.
2. Click the down-arrow icon to the right of the **Attachments** section and select '**Manage Attachments**' from the dropdown menu.



3. The '**Manage Attachments**' page will appear:

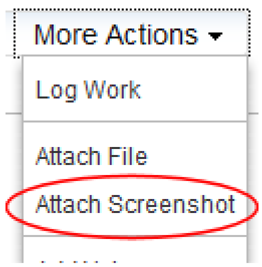


4. Locate the file you wish to delete and click the '**Delete Attachment**' icon:

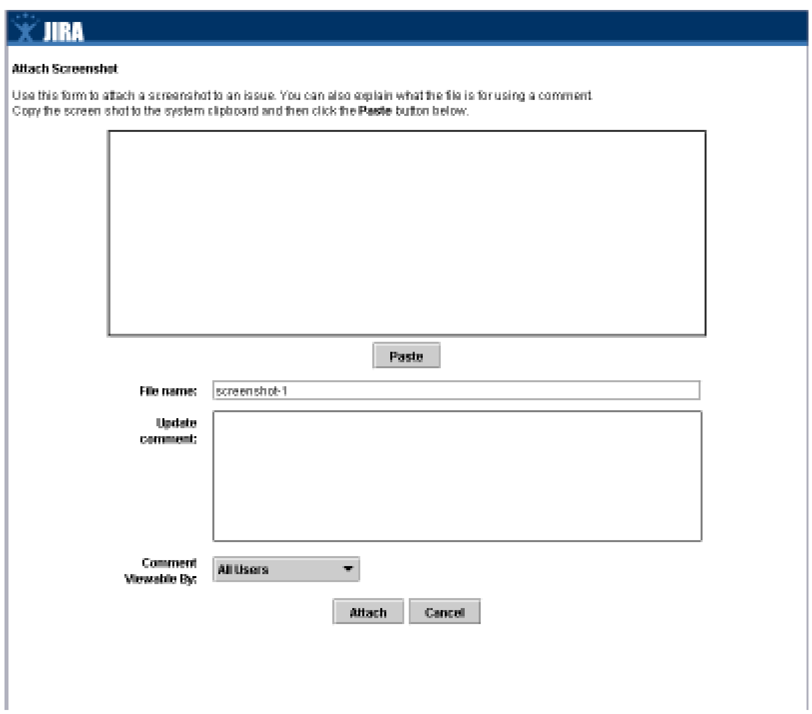
Attaching a Screenshot

To attach a screenshot:

1. Open the JIRA issue to which you wish to attach a file.
2. From the **'More Actions'** menu, select **'Attach Screenshot'**:



3. The **'Attach Screenshot'** page will open in a new browser window.

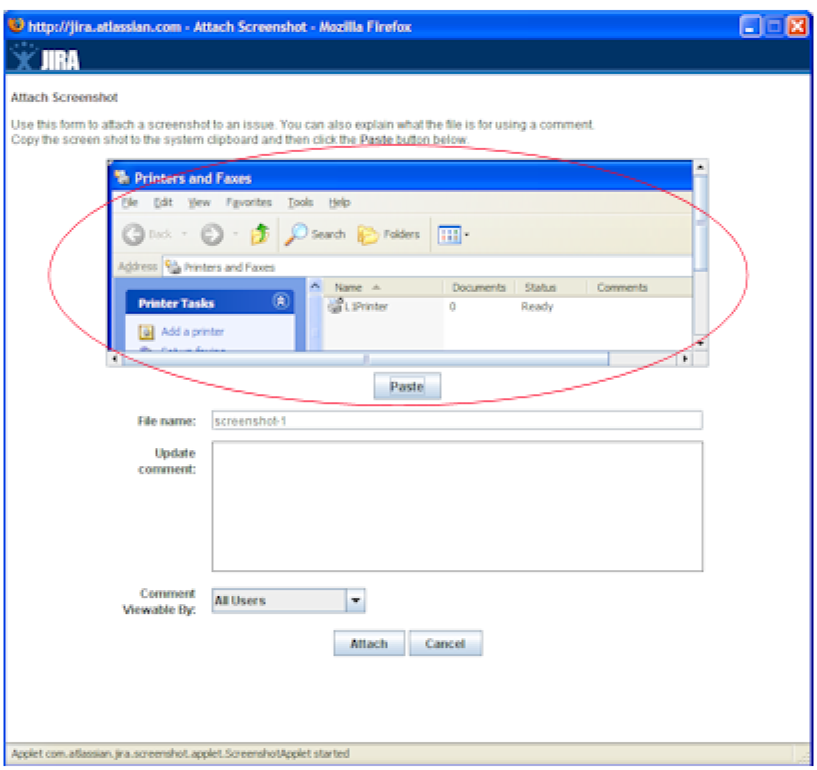


If this is the first time you have used this function, a security warning will also display in a dialog box asking you whether you want to trust the applet or not.

Choose the **'Yes'** option to trust the applet and access the **'Attach Screenshot'** page.

JIRA uses an applet to run the **'Attach Screenshot'** functionality in the new browser window. This will require you to have the JDK/JRE 6 installed.

4. Ensure that you have captured an image to your operating system's clipboard and click the **'Paste'** button to paste the image. Your captured image should display in the blank area above the **'Paste'** button.



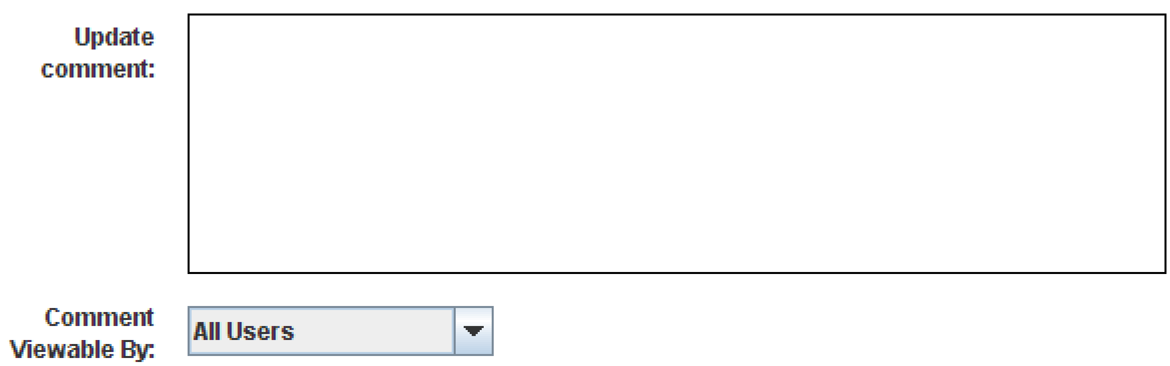
Please note that clicking the **'Attach'** button before an image has been pasted will not attach anything to the JIRA issue.

5. Enter a file name for the screenshot you are attaching in the **'File name:'** field. The file name will be initially defaulted to 'screenshot-1'.

A valid file name cannot contain any of these characters: '\', '/','\"', '%', ':', '$', '?', '*'.

If an invalid file name is entered, an error message will display when the **'Attach'** button is clicked and the screenshot will not be attached to the JIRA issue.

6. Enter a comment for the screenshot you are attaching in the **'Update comment:'** field. This is an optional step.

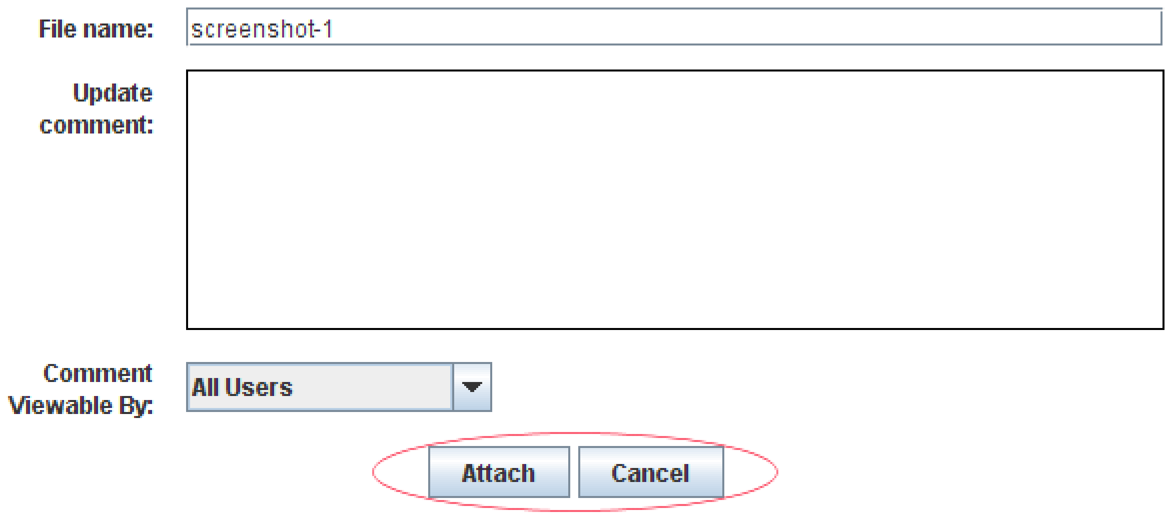


If you have entered a comment, then you can also set the security level for the comment by selecting the appropriate value from the **'Comment Viewable By:'** dropdown. The security level for the comment will initially be defaulted to 'All Users'.

The comment entered will be added to the JIRA issue, with the selected security level, when the screenshot is attached.

7. Click the **'Attach'** button to attach the captured image to your JIRA issue. The window will close and you will be returned to your original JIRA issue. At any time you may click the **'Cancel'** button to close the window without

attaching anything to the JIRA issue.



Capturing Screenshots

The method for capturing screenshots differs on each operating system, as described below:

Capturing a screenshot on Windows

- New screenshot capture — To capture a screenshot into the system clipboard, use either of the following keyboard combinations:
  - press **ALT-PRINTSCREEN** to capture your currently selected window; or
  - press **CTRL-ALT-PRINTSCREEN** to capture the whole desktop
- Existing image — Open your existing image in your favourite imaging application and select the copy option from the appropriate menu to capture the image into the system clipboard.

Capturing a screenshot on Mac OSX

- New screenshot capture — To capture a screenshot into the system clipboard, use either of the following keyboard combinations:

- press **CTRL-APPLE-SHIFT-4** to capture your currently selected window; or
- press **CTRL-APPLE-SHIFT-3** to capture the whole desktop

- Existing image — Open your existing image in your favourite imaging application and select the copy option from the appropriate menu to capture the image into the system clipboard.

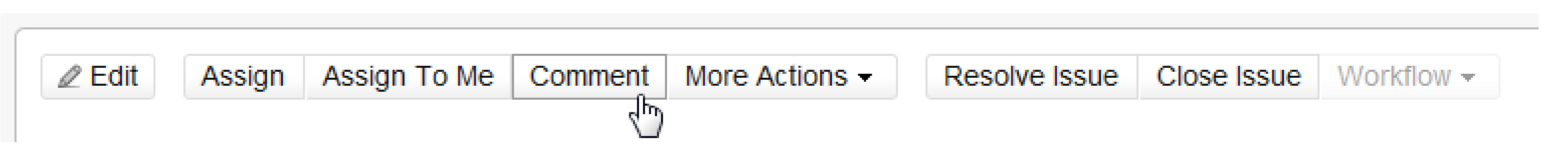
Commenting on an Issue

Adding comments to an issue is a useful way to record additional detail about an issue, and collaborate with team members. Comments are shown in the '**Comments**' tab of the '**Activity**' section when you view an issue.

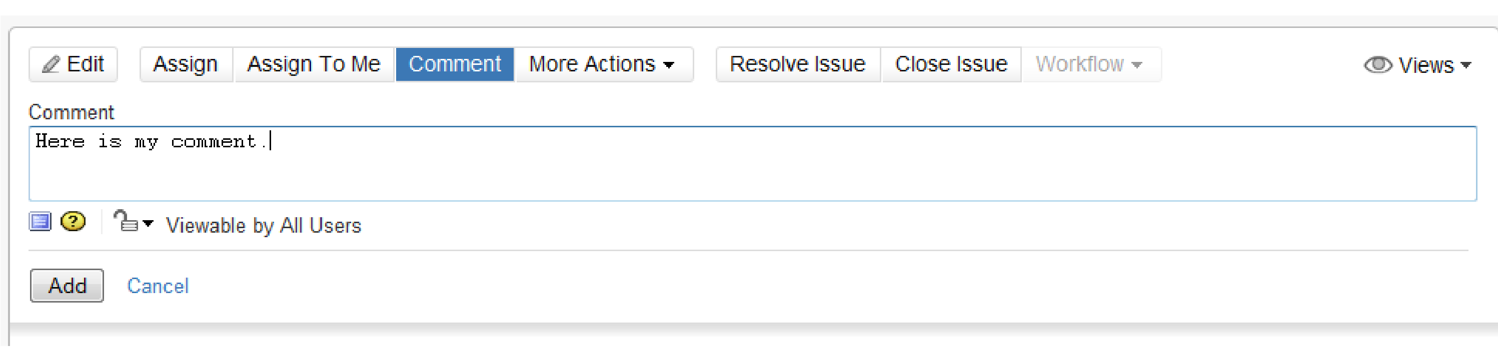
When adding a comment, you can set the comment to be **Viewable by** members of a particular project role or user group only; or you can allow all users to view it. For users to view a comment, they must have the 'Browse Project' permission to view the issue, and for each comment they must be a member of the **Viewable by** users (see Adding a Comment below).

Adding a comment

1. Open the issue on which to add your comment.

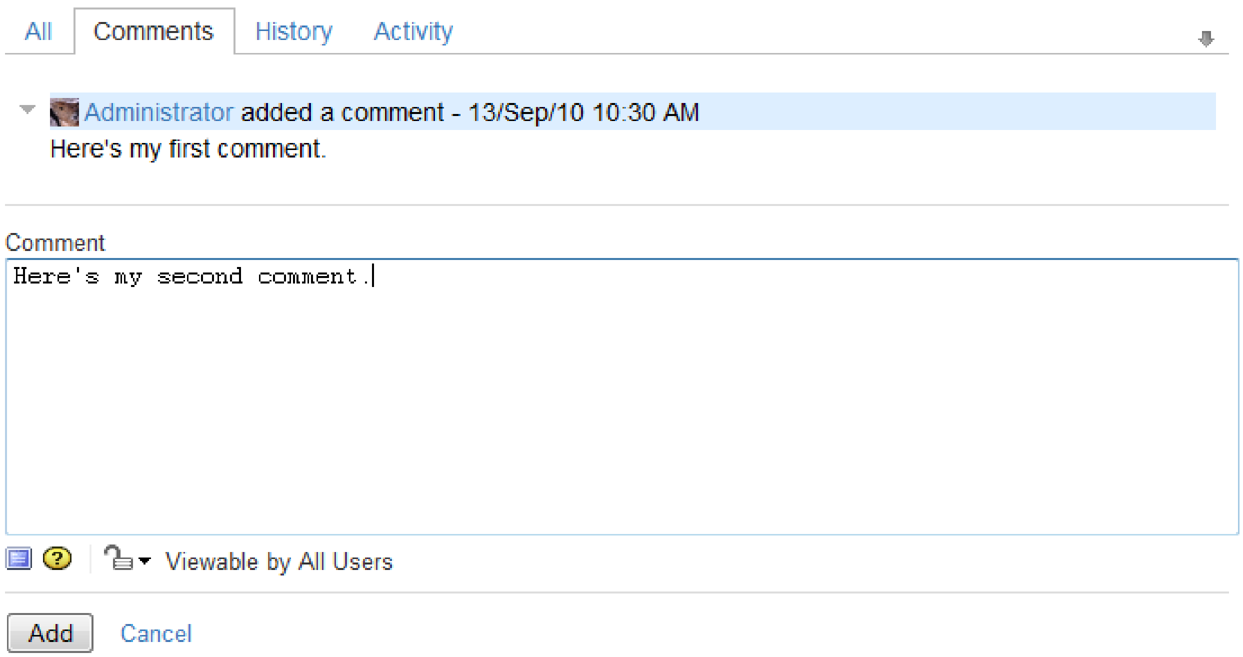


2. Click the '**Comment**' button at the top of the page. Refer to the note below if you do not see this button.



This opens the comment text box at the top of the page, where you can enter your comment:

Alternatively, if you are at the end of an issue, click the '**Comment**' button at the end of the page to open the comment text box at the bottom of the page.



3. Type your comment, using as many lines as you require.

   You can use [wiki markup]() if you wish.

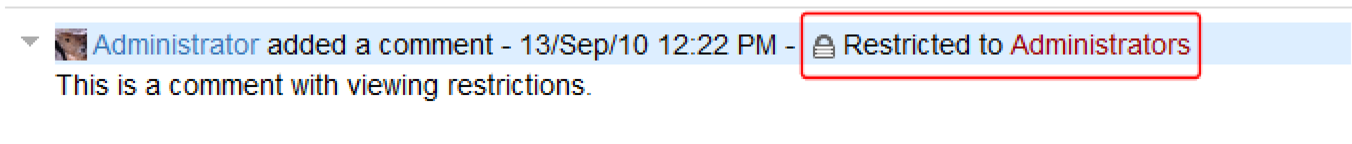
4. If you wish to apply viewing restrictions to this comment, click the open padlock icon next to **Viewable by...** and select which users will be able to view this comment.

   The **Viewable by...** list also includes all project roles and groups to which you belong. (Note that **All Users** means everybody who uses JIRA, while **Users** means everybody who is a member of the **Users** project role in this project.) Depending on how your JIRA administrator has configured 'Comment visibility', the **Viewable by...** list may include groups as well as project roles.

Once viewing restrictions have been applied to a comment, the padlock icon closes and **Viewable by...** is replaced by **Restricted to...** and indicates the user, project role or group, who can view this comment, for example:

5. Click the '**Add**' button.

Screenshot: Example comment with visibility restrictions



For each comment on an issue, a small version of the comment author's user avatar appears to the left of their full name.

To add comments to an issue, you must have both of the following permissions:

- 'Browse Project' permission — to view the issue to be commented on
- 'Add Comments' permission — to add a comment to the issue

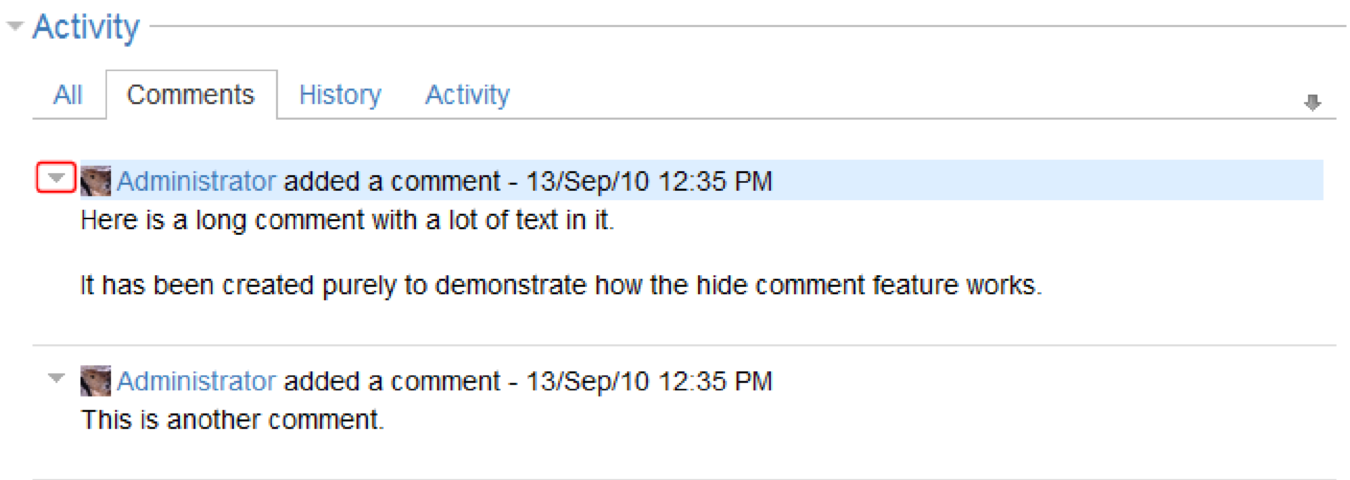
Collapsing/Expanding a comment

Note that 'Collapsing' or 'Expanding' a comment does not relate in any way to 'visibility restrictions'.

To collapse or expand a comment:

1. Locate the comment in the **Activity** section at the bottom of the issue.

2. Browse to the comment you wish to collapse/expand.
3. To 'collapse' a comment, click the **Collapse** icon, located on the comment:

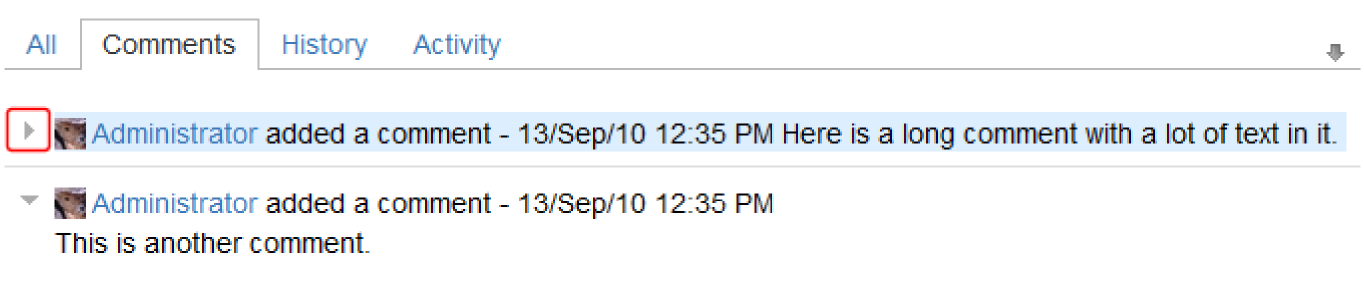


4. To 'expand' a collapsed comment, click the **Expand** icon, located on the comment:

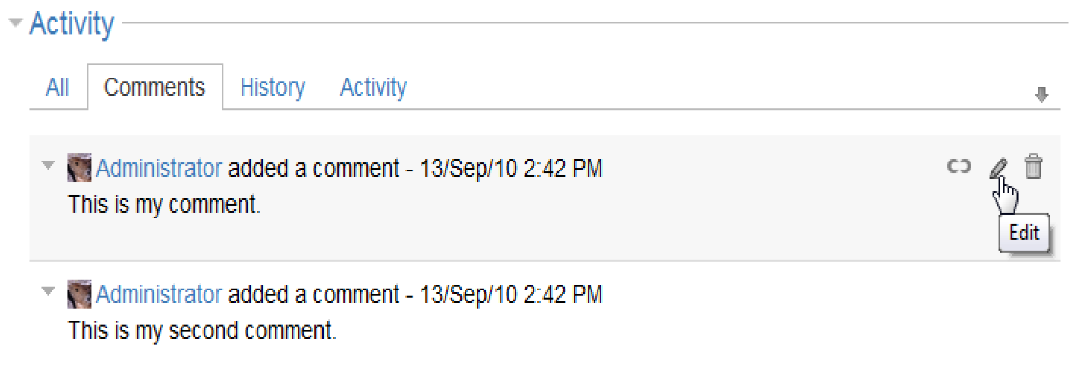
Editing a comment

To edit a comment,

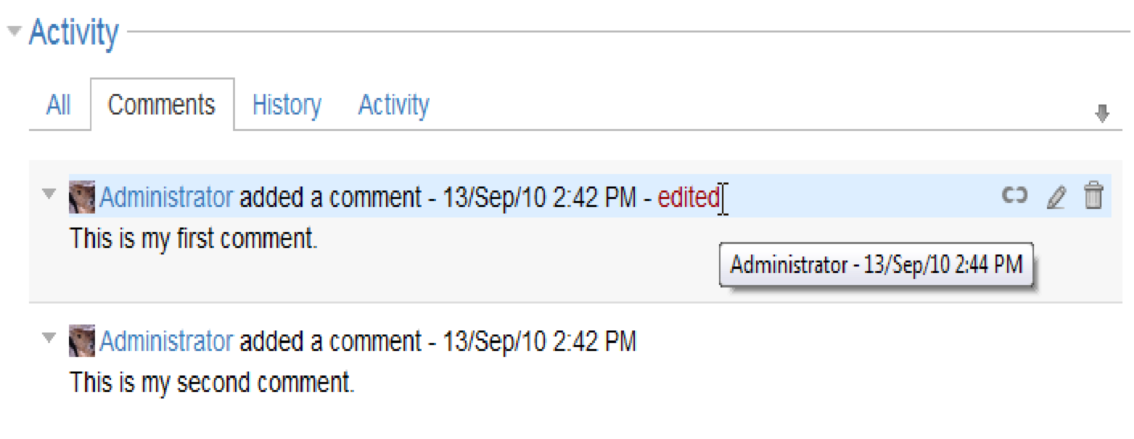
1. Locate the comment in the **Activity** section at the bottom of the issue.
2. Browse to the comment you wish to edit.



3. Click the **Edit** (pencil) icon, located on the comment:



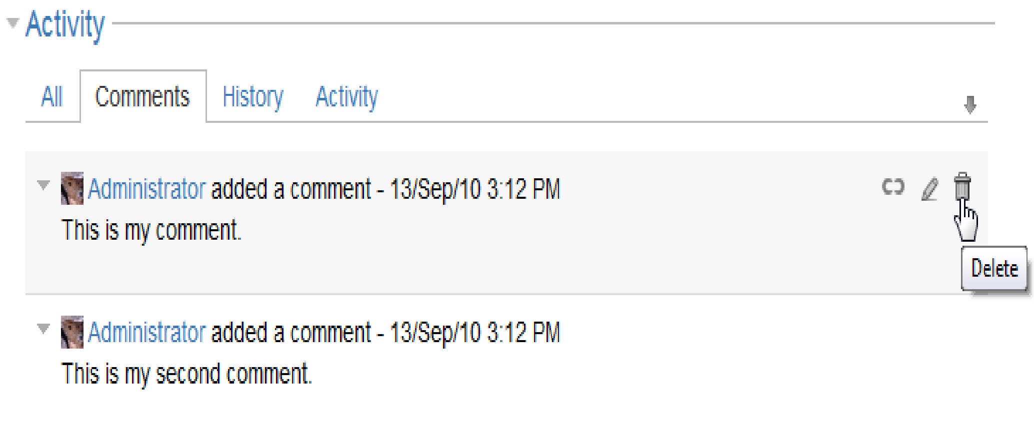
4. Edit the comment's text and/or **Viewable by** list as required.
5. Click the **'Save'** button.
6. The word 'edited' will be displayed to indicate that the comment has been edited. You can hover your mouse over the word 'edited' to see who edited the comment and when, e.g.:



You can edit your own comments if you have been granted the 'Edit Own Comments' permission. You can edit other people's comments if you have been granted the 'Edit All Comments' permission.

Deleting a comment

1. Browse to the comment you wish to delete.
2. Click the **Delete** (trash-can) icon, located on the comment:



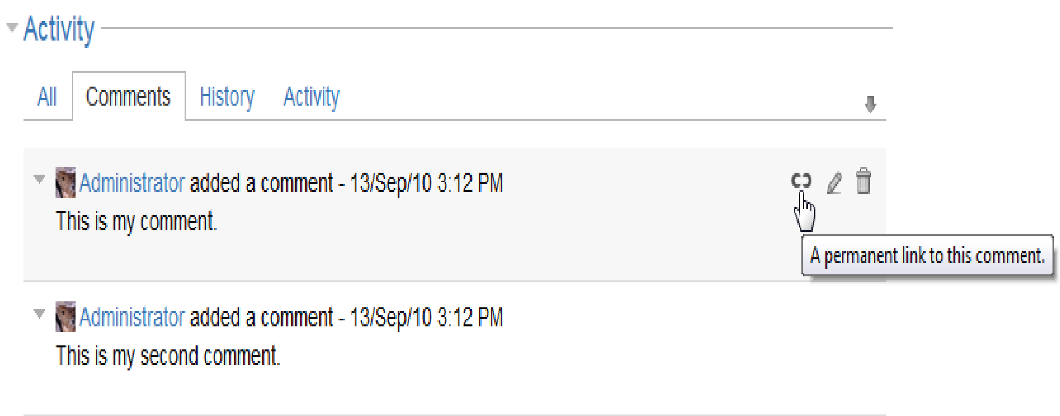
3. Confirm the deletion by clicking the **Delete** button.

You can delete your own comments if you have been granted the 'Delete Own Comments' permission. You can delete other people's comments if you have been granted the 'Delete All Comments' permission.

Linking to a comment

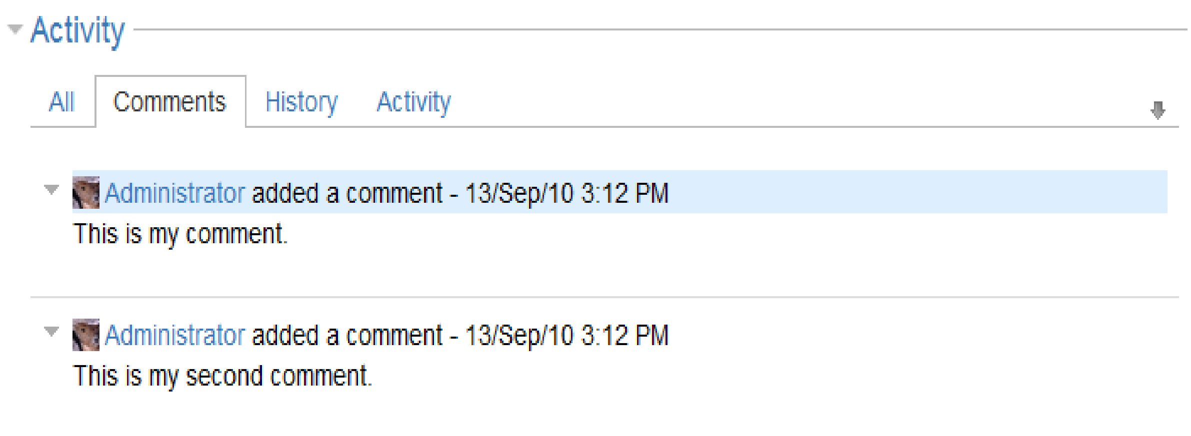
Sometimes you may want to link to a specific comment within a JIRA issue. To do this,

1. Browse to the comment you wish to link to.



2. Click the **Permlink** (link) icon, located on the comment:

3. The comment will now be highlighted in pale blue, e.g.:



If your JIRA issue contains an extensive list of comments, the issue page will automatically be scrolled down so that the linked comment is visible.

4. The URL in your browser's address bar will now look something like this:

http://jira.atlassian.com/browse/TST-123?focusedCommentId=94796#action_94796

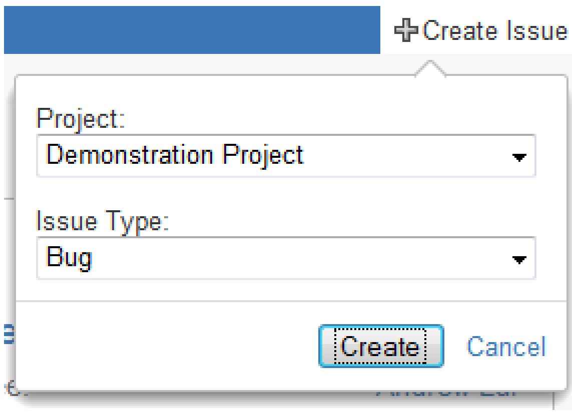
5. Copy the URL from your browser's address bar and paste it into wherever you want to link from (e.g. an email).

Creating an Issue

To create a JIRA issue, you will need to have the 'Create Issue' permission in the relevant project. If you don't have this permission, please contact your JIRA administrator.

To create a new JIRA issue:

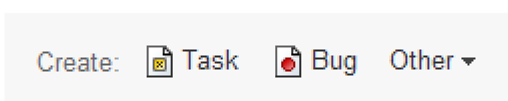
1. Click the '**Create Issue**' link at the top of the screen.



The '**Choose the project and issue type**' popup will be displayed.

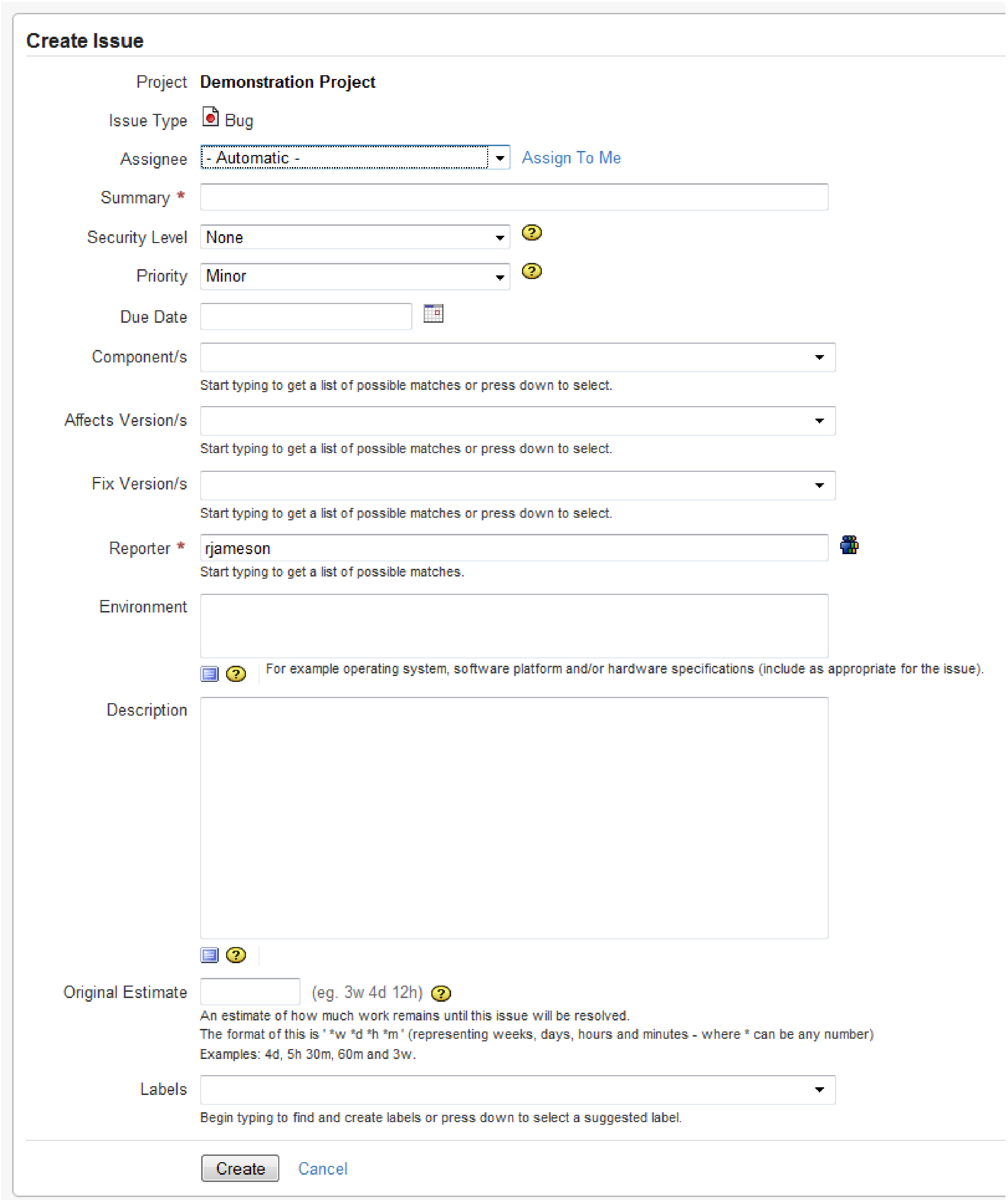
Note that this popup will not be displayed if:

- There is only one project and only one issue type for that project in your JIRA site.
- You click '**Create Issue**' while browsing a project, and there is only one issue type for that project.
- You click one of the '**Create**' icons while browsing a project, e.g.:



2. Select the relevant project and issue type, then click the '**Create**' button.

   The '**Enter the details of the issue**' screen will be displayed.



Note that this screen may look different if your JIRA administrator has customised it.

3. Type a summary of the issue and complete any other required fields, which are italicised and highlighted by an asterisk.
4. Click the '**Create**' button at the bottom of the page. The new issue will be created and you will see the 'View Issue' screen, showing the issue details that you have provided. You may also receive an email containing details and a link to your new issue.

To see a list of all issues that you have created, which have not yet been resolved, go to your user profile and click the '**Reported & Open**' filter.

With appropriate configuration by your JIRA administrator, it is also possible to create issues via email.

Creating a Sub-Task

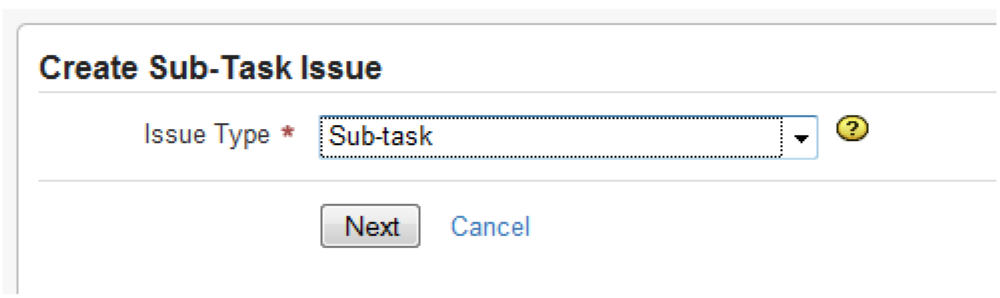
Sub-task issues are useful for splitting up a parent issue into a number of tasks which can be assigned and tracked separately. Splitting issues into smaller tasks often provides a better picture of the progress on the issue, and allows each person involved in resolving the issue to better understand what part of the process they are responsible for.

All the sub-tasks related to a parent issue are summarised on the parent issue's main screen (see 'Working with Sub-Tasks' below). Sub-tasks always belong to the same project as their parent issue.

Sub-tasks have all the same fields as standard issues, e.g. Summary, Description, Reporter, Assignee, Status. Note that sub-tasks have a different set of issue types from the standard issue types.

Sub-tasks cannot have sub-tasks of their own. However, if you need to break up a sub-task into smaller sub-tasks, you could achieve this by first converting the sub-task to a standard issue (see below). You would then be able to create sub-tasks for it.

Creating a sub-task

1. Navigate to the issue which you would like to be the parent issue of the sub-task you are about to create.
2. Select '**Create Sub-Task**' from the '**More Actions**' drop-down menu.
3. The '**Choose the project and issue type**' screen will be displayed. Select the sub-task issue type (the default is 'Sub Task', but others may have been added by your JIRA administrator) and click the 'Next' button.


4. The '**Enter the details of the issue**' screen will be displayed, similar to creating a standard issue. Type a summary for the sub-task and complete any other required fields, which are italicised and highlighted by an asterisk.
Note that there is no option to set security on a sub-task, as sub-tasks inherit their parent issue's security levels (if any have been set).

5. Click the '**Create**' button at the bottom of the page. The sub-task will be created and you will see the 'View Issue' screen, showing the sub-task's details that you have provided. The parent issue's summary and issue key are displayed above the sub-task's summary. You can easily return to the parent issue by clicking its summary or issue key.

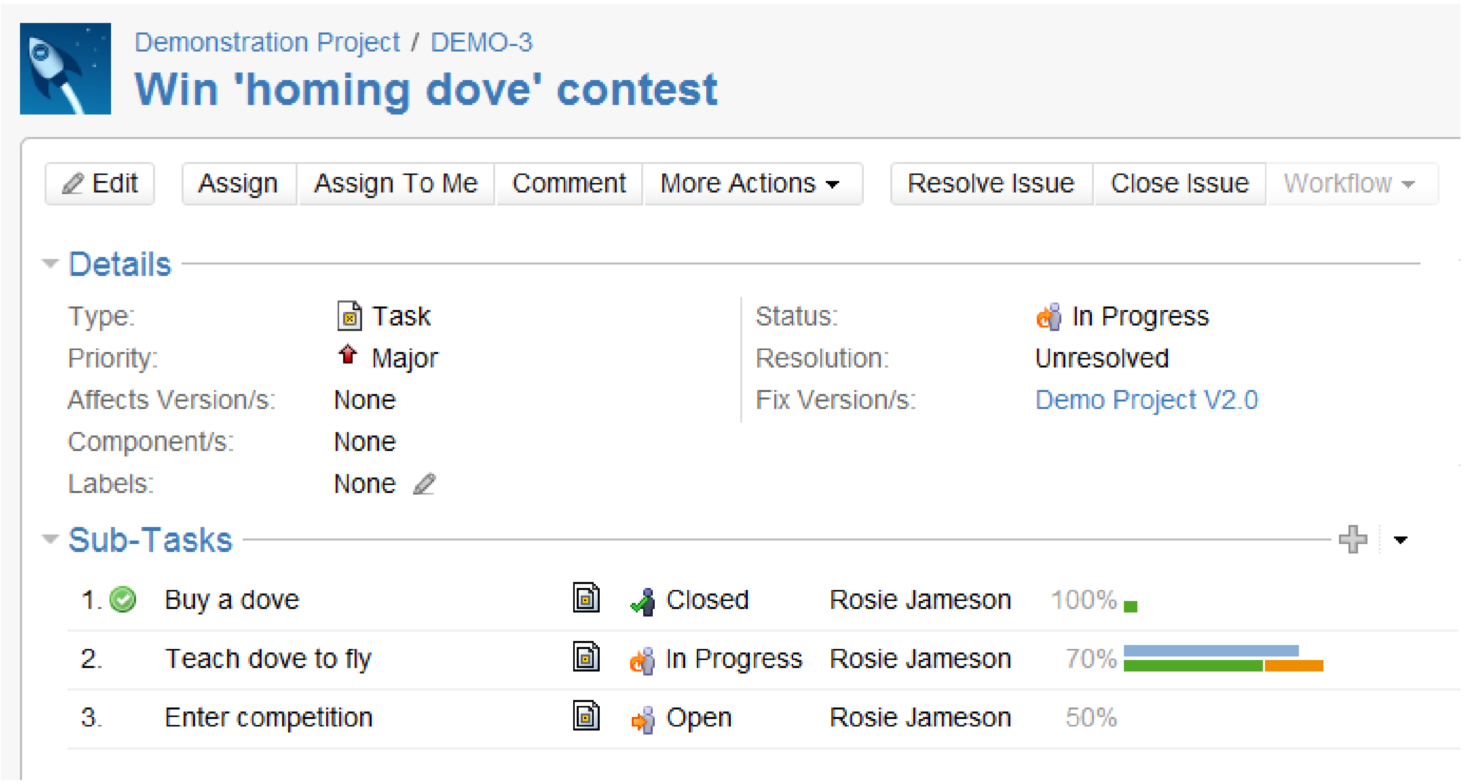
In the above screenshot, the new sub-task is **DEMO-6 (Enter competition)** and its parent issue is **DOVE-3 (Win 'homing dove' contest).** Both belong to the **Dove** project.

To create sub-tasks, you will need to have the 'Create Issue' permission in the parent issue's project. Also note that sub-tasks can only be created if your JIRA administrator has enabled sub-tasks and added the sub-task issue type to the project's issue type scheme.

Working with sub-tasks

If an issue has sub-tasks, then the issue screen will show a list of all the issue's sub-tasks:

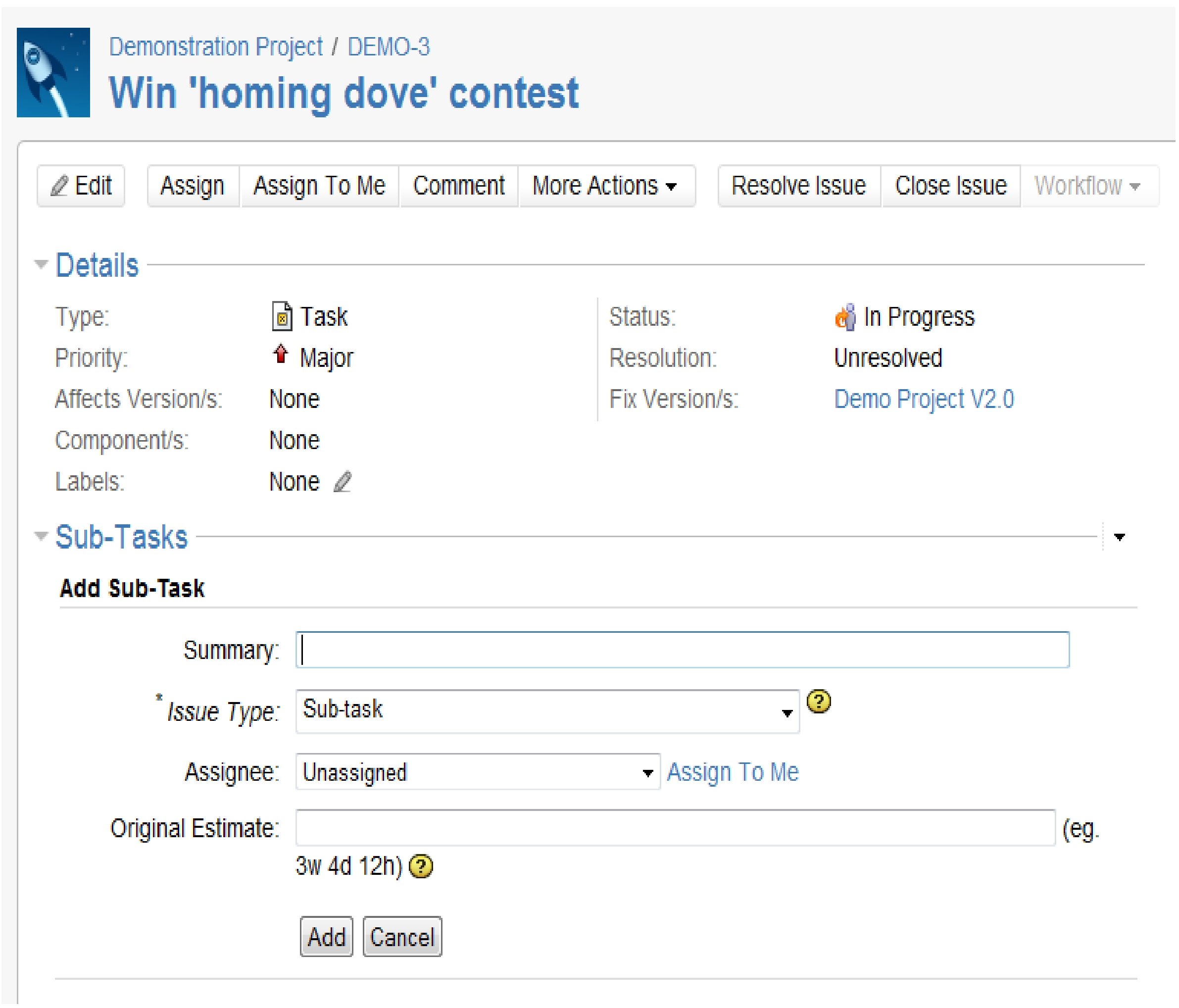
Screenshot: An Issue's Sub-Tasks



- The sub-task list has two *views:* 'All' and 'Open'. The *All* view lists all sub-tasks, regardless of status, while the *Open* view only shows sub-tasks that have not been resolved (i.e. do not have a Resolution). You can switch views by clicking the 'All' and 'Open' links.
- The coloured bars show the time-tracking data for the issue and its sub-tasks.
- You can reorder sub-tasks, for example, organise the list in the order of intended execution or priority. Hover your mouse over the sub-task you wish to move, and use the 'up' and 'down' arrows that will appear.

- You can perform *actions* on the sub-tasks, e.g. 'Assign Issue', 'Resolve Issue', 'Close Issue', 'Reopen Issue'. Hover your mouse over the sub-task you wish to action, and click the 'Actions' drop-down menu link that appears.
- Once an issue has one or more sub-tasks, you can quickly create additional sub-tasks by clicking the '+' icon, which will display the '**Add Sub-Task**' form show below. Type a description in the 'Summary' field and click the '**Add**' button. (The other sub-task fields are optional, although '**Issue Type**' will default to 'Sub-task' and '**Assignee**' will default to 'Unassigned'.)

Screenshot: 'Add Sub-Task' form



The 'Add Sub-Task' form may look different if your JIRA administrator has customised it — see Configuring Sub-tasks.

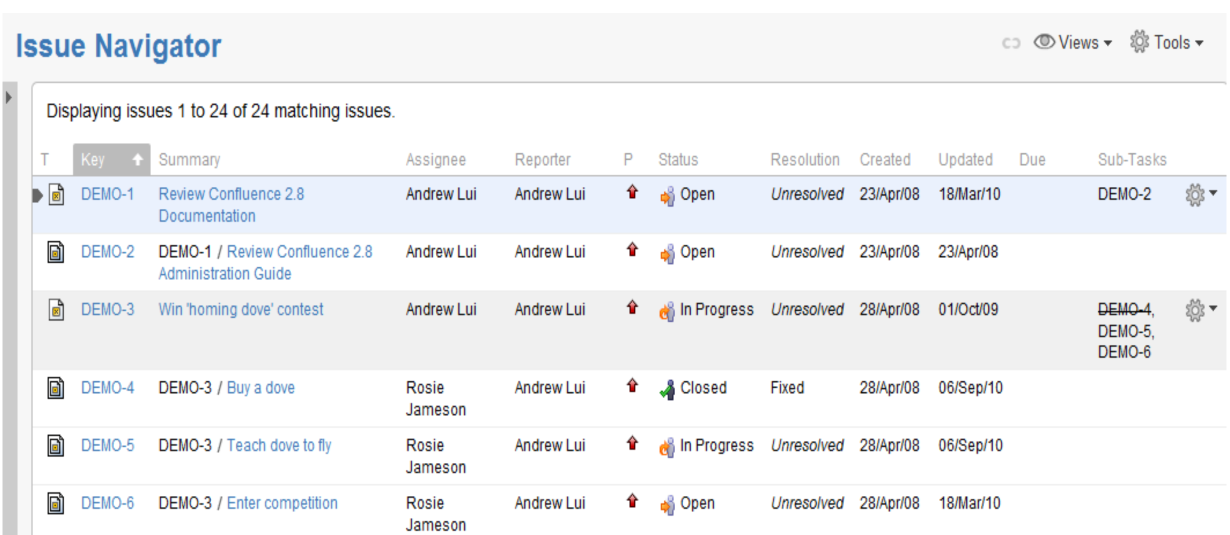
Searching for sub-tasks

When sub-tasks are enabled, two extra entries will appear in the 'Issue Type' drop-down list in the Issue Navigator's search form. These entries are: 'Standard Issue Types' and 'Sub-Task Issue Types'.

- To search standard issues only, click the *Standard Issue Types* entry.
- To search sub-task issues only, click *Sub-Task Issue Types* entry.
- To search for one specific type of issue or sub-issue, select just one Issue Type or one Sub-Task Issue Type.

If no entries are selected from the 'Issue Type' drop-down then the search will return all the standard issues *and* sub-task issues that meet the rest of the search criteria.

Once you have added the 'Sub-Tasks' column to your Issue Navigator (see below), the search results indicate sub-task issues by displaying the parent issue's issue key above the sub-task's summary, as shown below:



Adding the 'Sub-Tasks' column to your Issue Navigator

To add the '**Sub-Tasks**' column to your Issue Navigator as shown in the above screenshot, please see Customising your Issue Navigator columns.

Converting a standard issue to a sub-task

1. Navigate to the issue which you would like convert to a sub-task.
2. Select '**Convert to sub-task**' from the '**More Actions**' drop-down menu
3. The '**Step 1. Select Parent Issue and Sub-Task Type**' screen will be displayed. Type or select the appropriate parent issue type, select the new issue type (i.e. a sub-task issue type) and click the 'Next' button.
4. If the issue's current status is not an allowed status for the new issue type, the '**Step 2. Select New Status**' screen will be displayed. Select a new status and click the '**Next**' button.
5. The '**Step 3. Update Fields**' screen will be displayed. If the new issue type requires any additional fields, you will be prompted to enter them (otherwise you will see the message 'All fields will be updated automatically'). Click the '**Next**' button.
6. The '**Step 4. Confirmation**' screen will be displayed. If you are satisfied with the new details for the issue, click the '**Finish**' button.
7. The issue will be displayed. You will see that it is now a sub-task, that is, its parent's issue number is now displayed at the top of the screen (see 'Creating a sub-task' above).

Note that you will not be able to convert an issue to a sub-task if the issue has sub-tasks of its own. You will first need to convert the issue's sub-tasks to standalone issues (see below); you can then convert them to sub-tasks of another issue if you wish. Sub-tasks cannot be moved directly from one issue to another — you will need to convert them to standard issues, then to sub-tasks of their new parent issue.

Converting a sub-task to a standard issue

1. Navigate to the sub-task issue which you would like convert to a standard issue.
2. Select '**Convert to issue**' from the '**More Actions**' drop-down menu.
3. The '**Step 1. Select Issue Type**' screen will be displayed. Select a new issue type (i.e. a standard issue type) and click the '**Next**' button.
4. If the sub-task's current status is not an allowed status for the new issue type, the '**Step 2. Select New Status**' screen will be displayed. Select a new status and click the '**Next**' button.
5. The '**Step 3. Update Fields**' screen will be displayed. If the new issue type requires any additional fields, you will be prompted to enter them (otherwise you will see the message 'All fields will be updated automatically'). Click the '**Next**' button.
6. The '**Step 4. Confirmation**' screen will be displayed. If you are satisfied with the new details for the issue, click the '**Finish**' button.
7. The issue will be displayed. You will see that it is no longer a sub-task, that is, there is no longer a parent issue number displayed at the top of the screen.

Searching for Issues

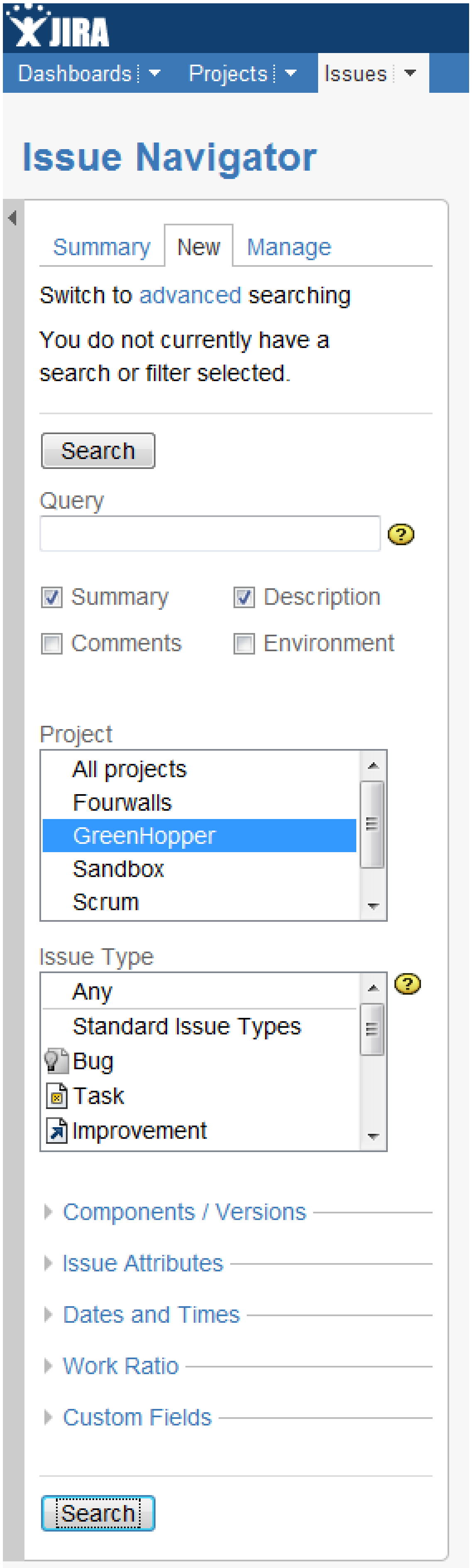
JIRA provides a powerful issue search facility. You can search for issues across projects, versions and components using a range of search criteria. If you need to find issues based on time-tracking details, then the standard 'simple search' interface also allows you to search against the work logged on issues. JIRA also makes custom fields available as search criteria, allowing you to refine your searches even further.

You can also save your search as an issue filter in JIRA, allowing you to recall the same search and run it again or even share it with other users. Read more about issue filters.

Performing a Simple Search

1. On the top navigation bar, click the '**Issues**' tab. This will display information on the issue filter or search you currently have selected, if any, on the left hand side of the page. If you have an issue filter or search currently selected, the results will be displayed in the 'Issue Navigator' on the right hand side of the page. Otherwise, no results will be shown.
2. If you currently have an issue filter or search selected and wish to run a new search, click the '**New**' link on the top left hand side of the page. The search form will display on the left-hand side of the screen.
3. Type your search term(s) into the '**Query**' box (see Specifying a Query below), and/or select other criteria from the drop-down boxes and check-boxes described below. The drop-down boxes and check-boxes allow you to narrow your search, e.g. to issues in a certain project, only issues that are marked as 'critical', only issues marked as 'enhancements', only issues reported by or assigned to a particular person.
4. Click the '**Search**' button to perform the search. Your search results will be displayed in the Issue Navigator.

Screenshot: The 'Simple Search' form


JIRA
Dashboards
Projects
Issues
Issue Navigator
Summary
New
Manage
Switch to advanced searching
You do not currently have a search or filter selected.
Search
Query
Summary
Description
Comments
Environment
Project
All projects
Fourwalls
GreenHopper
Sandbox
Scrum
Issue Type
Any
Standard Issue Types
Bug
Task
Improvement
Components / Versions
Issue Attributes
Dates and Times
Work Ratio
Custom Fields
Search

Specifying a Query

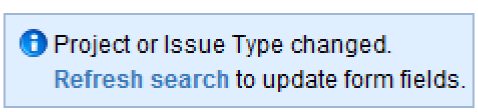
You can specify particular text to search for in any or all of the following fields:

- **Summary**
- **Description**
- **Environment**
- **Comments**

For details about how to refine your search term, please see Performing Text Searches.

Searching particular Projects or Issue Types

The **Project** and **Issue Type** fields determine which other fields are shown in the search form and what options you can see for these fields. For example, the 'Version' and 'Component' fields (see below) will only be available when searching for a single project, and will have different options for each project. When you change the project(s) or issue type(s), you may need to *refresh* the search filter in order to get the most up-to-date versions, components and custom fields. If a refresh is needed, a blue box will appear, containing a link for you to click:



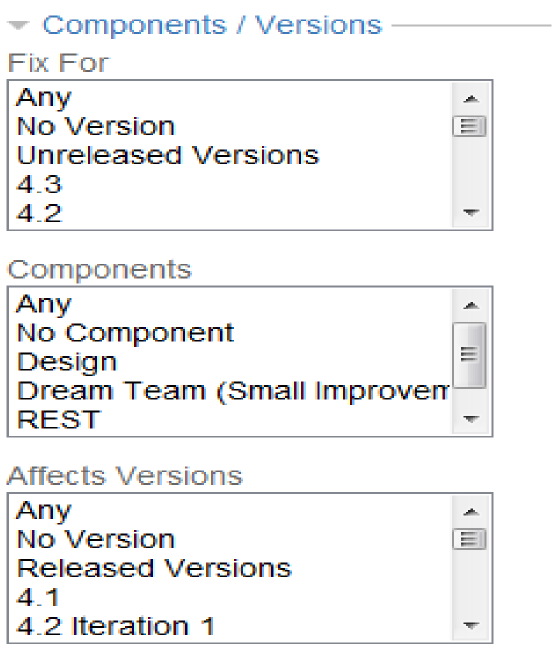
If you search on a single project, JIRA will remember that as your selected project and will default to that project on the "Browse Project" and "Create Issue" screens.

Using the 'Components/Versions' section

You can search for issues in a particular:

- **Component**
- **Affects Version**
- **Fix Version**

Screenshot: The 'Components' section



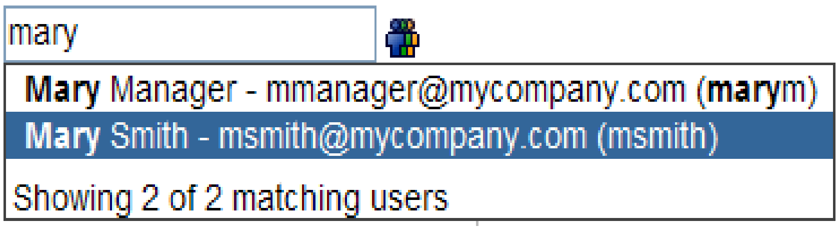
To learn more about components and versions, please see What is a Project?.

Using the 'Issue Attributes' section

You can specify particular values for the following fields:

- **Reporter**
- **Assignee**
- **Status**
- **Resolutions**
- **Priorities**
- **Labels**

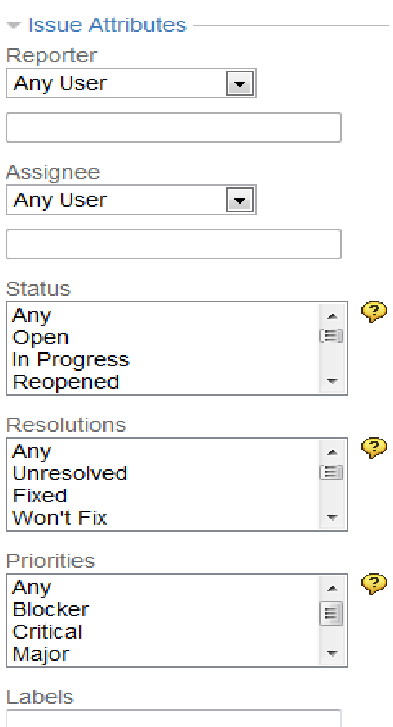
For example, to find issues reported by a particular person, select 'Specify User' in the '**Reporter**' field. In the field that appears beneath, type a few letters of the person's name (first name or surname) to display a drop-down list of matching names:



Alternatively, click the  icon to display a pop-up list of all names on your JIRA system.

Please note: if the names drop-down does not display, your administrator may have disabled the '[User Picker Auto-complete]' feature for your JIRA instance.

Screenshot: The 'Issue Attributes' section

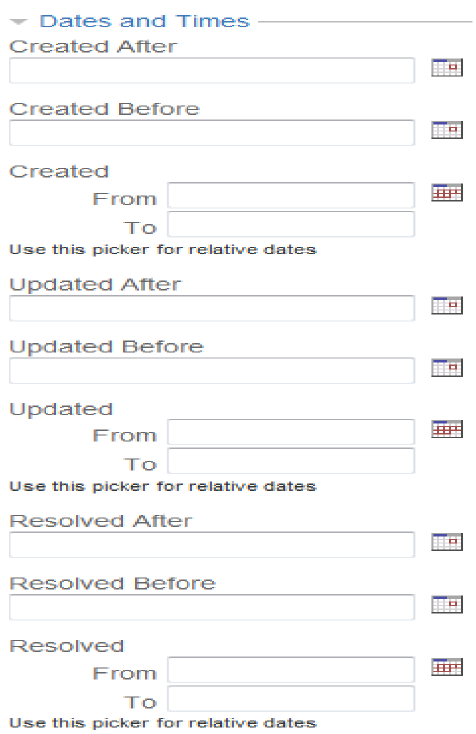


Using the 'Dates and Times' section

You can search for issues that were:

- **Created** after or before a particular date, or during a particular date range
- **Updated** after or before a particular date, or during a particular date range
- **Resolved** after or before a particular date, or during a particular date range
- **Due** after or before a particular date, or during a particular date range

Screenshot: The 'Dates and Times' section



Using the 'Work Ratio' section

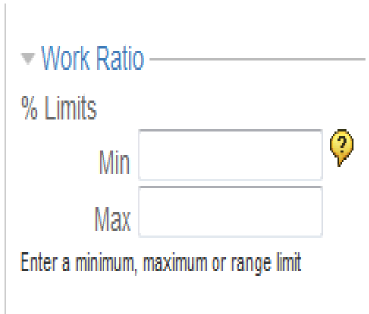
The search form contains a 'Work Ratio' section, enabling you to search JIRA issues based on time-tracking details.

The 'Work Ratio' search is based on the **Actual** work logged against an issue versus the original **Estimated** work duration.

- **Work Ratio Percentage = (Time Spent / Original Estimate) x 100**

You can enter a minimum, maximum or percentage range; the search will respectively return all issues above, below or within the specified percentage range.

Screenshot: The 'Work Ratio' section



Using the 'Custom Fields' section

Your administrator may have created custom fields for your JIRA system. Custom fields can be searched, but note that they will only appear in the search form on the left when appropriate. That is:

- Custom fields that relate to a particular *project* will only appear in the search form after you choose that project.
- Custom fields that relate to a particular *issue type* will only appear in the search form after you choose that issue type.