

# Tutorial on JIRA

By World Of Agile

World Of Agile  
[support@effectivepmc.com](mailto:support@effectivepmc.com)

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# Jira Tutorial

## What is Jira

Jira is a software application developed by company named Atlassian. Jira is a very popular tool that allows teams to track issues, manage projects, and automate workflows. Agile development teams widely use this tool for managing their projects. Jira is also used as an issues and bugs tracking system.

### Mobile App

JIRA is available as a Mobile Application as well.

It is available on Google Play Store and App Store (iTunes) of Apple.

Easy to stay connected with the team while moving anywhere with notification, comments and project activity.

### Multilingual

JIRA supports more than 10 languages those are widely used as English (US, UK, India), French, German, Portuguese, Spanish, Korean, Japanese and Russian.

## Introduction to Jira:

This tutorial on Jira introduces the readers to the fundamental features and usage of JIRA.

### Core Jira Features

There are 6 core JIRA features. Listed below are important and commonly used features in detail for better understanding.

Feature	Description
Boards	JIRA supports Scrum and Kanban boards. These boards provide an immediate snapshot of the project to the team.

	<p>Helps to quickly review the progress of the project and see the status of the individual tasks.</p> <p>Board workflow can be customized to fulfil the way a team wants to proceed.</p>
Task Details	<p>Tasks can be defined at the individual level to track the progress.</p> <p>Status of every task, comment, attachment and due dates are stored in one place.</p>
Business Project Template	<p>JIRA supports <b>n</b> number of business templates to manage simple tasks and complex tasks like workflow.</p> <p>Template can be customized based on the team and their approach. Ex: Workflow can be customized based on each team's approach.</p> <p>Every step is accounted and team can move to achieve their goals.</p>
Notifications	<p>An email can be sent for a particular task to the users.</p> <p>Voting and watching features to keep an eye on the progress for the stakeholders.</p> <p>Use <b>@mention</b> to get the attention of a specific team member at Comments/Description.</p> <p>User will instantly notify if something is assigned or if any feedback is required.</p>
Power Search	<p>JIRA supports a powerful search functionality with Basic, Quick and Advanced features.</p> <p>Use the search tool to find answers like due date, when a task was last updated, what items a team member still needs to finish.</p>

	Project information at one place, search within a project.
Reports	<p>JIRA supports more than a dozen reports to track progress over a specific timeframe, deadlines, individual's contribution, etc.</p> <p>Easy to understand and generate different reports those help to analyze how the team is going on.</p> <p>Easy to configure these reports and display the matrices to the stakeholders.</p>

## *How to install Jira?*

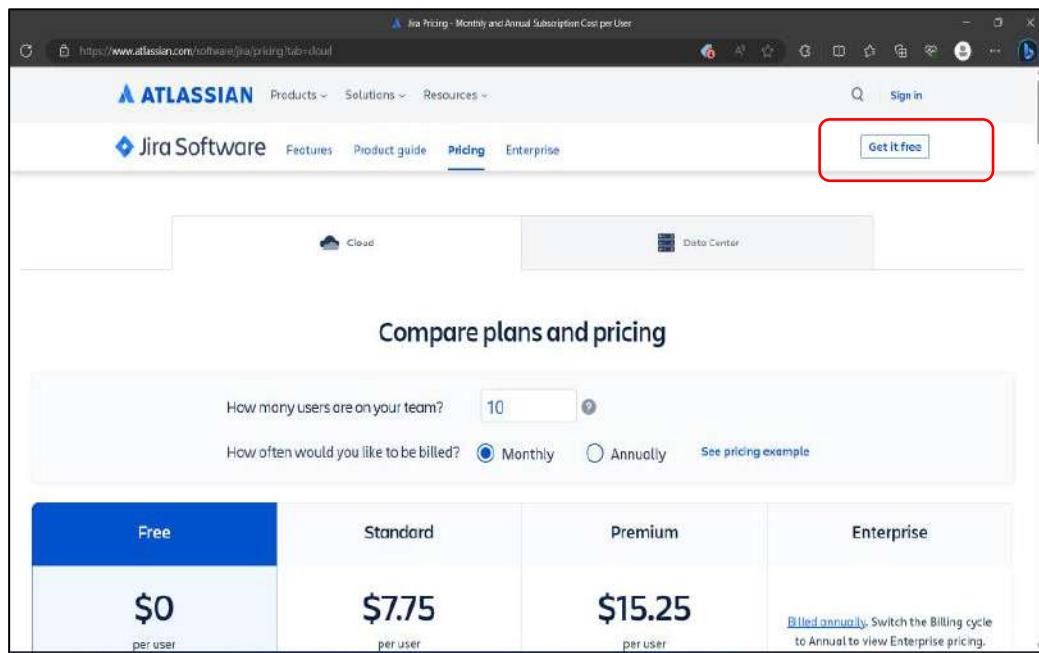
### Points to Note

- JIRA is a web application that provides a private website to an individual or a set of requested users belonging to the same company/project.
- JIRA can be run as a Windows Service at the server side.
- JIRA is a pure Java based application and supports all OS platforms like Windows, Linux of different versions or MAC, etc., those satisfy JDK/JRE requirements.
- JIRA supports all famous browsers like Chrome, IE, Mozilla and Safari.
- It supports Mobile browsers as well in mobile views.

### Use Web-based Jira Instance

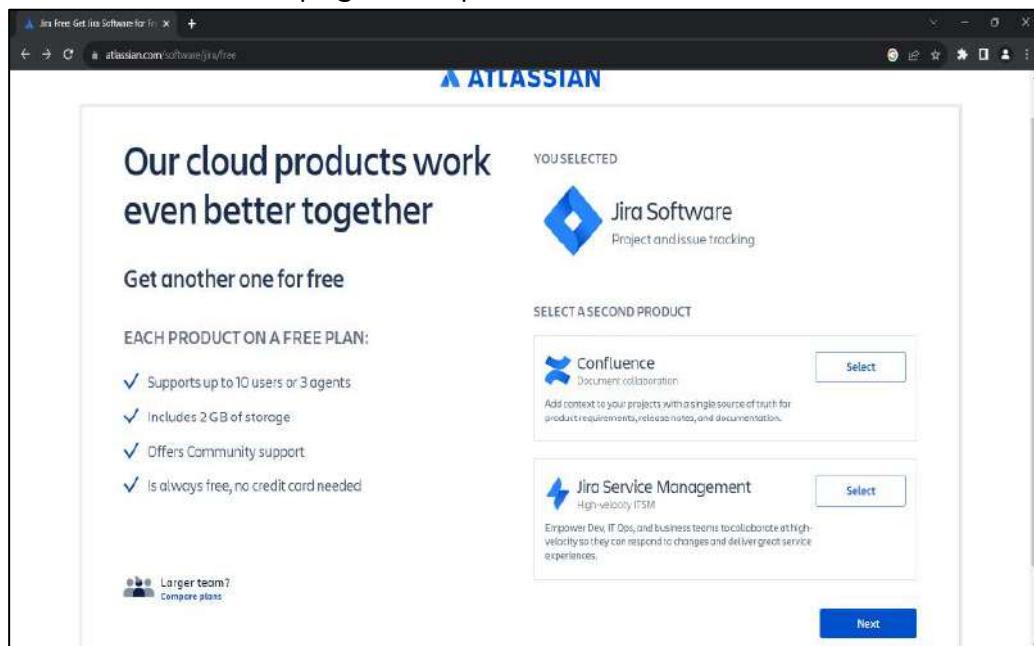
#### Steps to Follow:

1. Go to Atlassian Website. [– Click Here](#)
2. Click on “Get it Free”



The screenshot shows the Atlassian Jira Software Pricing page. At the top, there's a navigation bar with links for Products, Solutions, Resources, Jira Software, Features, Product guide, Pricing (which is underlined), and Enterprise. A "Get it free" button is highlighted with a red box. Below the navigation, there are two tabs: "Cloud" and "Data Center". The main section is titled "Compare plans and pricing". It asks for "How many users are on your team?" (set to 10) and "How often would you like to be billed?" (set to Monthly). It then displays four plan options: Free (\$0 per user), Standard (\$7.75 per user), Premium (\$15.25 per user), and Enterprise (with a note: "Billed annually. Switch the Billing cycle to Annual to view Enterprise pricing").

3. Product information page will open. Click "Next"

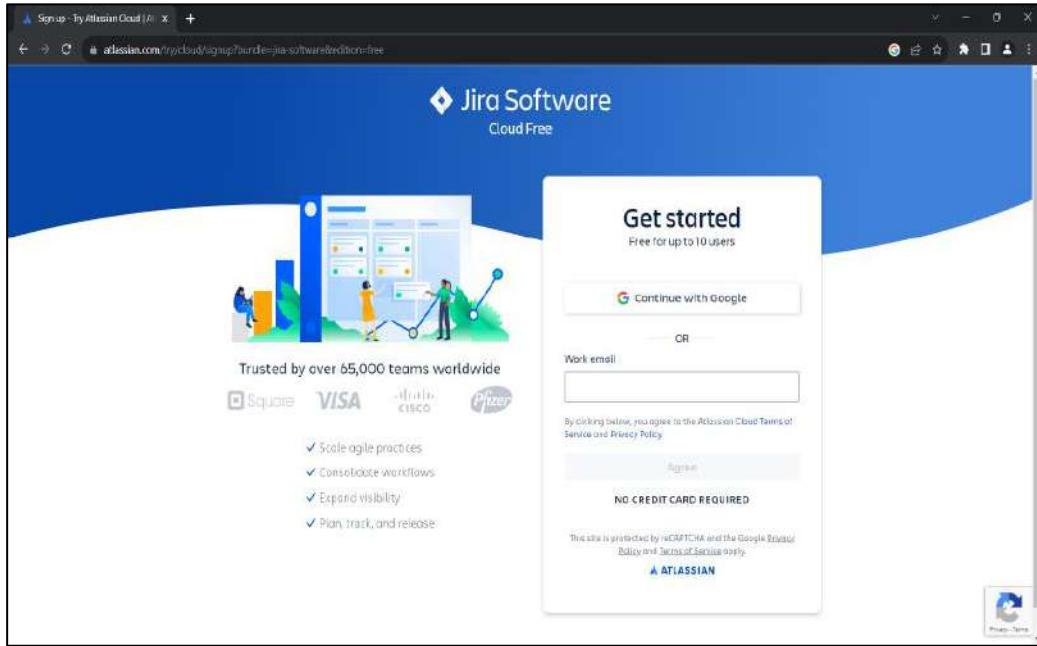


The screenshot shows the "Get it free" page for Jira Software. It features a headline "Our cloud products work even better together" and a sub-section "Get another one for free". It lists "EACH PRODUCT ON A FREE PLAN:" with the following benefits:

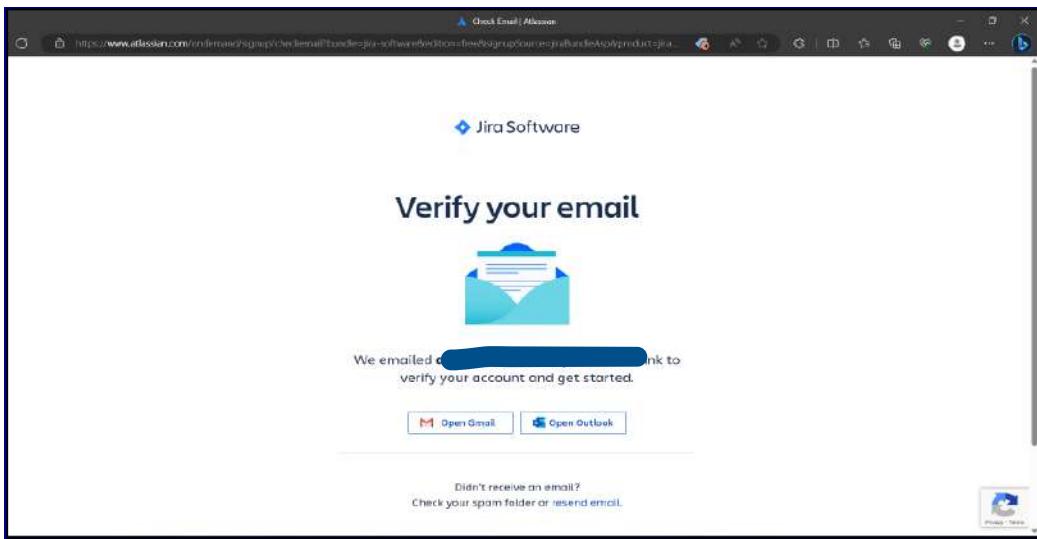
- ✓ Supports up to 10 users or 3 agents
- ✓ Includes 2 GB of storage
- ✓ Offers Community support
- ✓ Is always free, no credit card needed

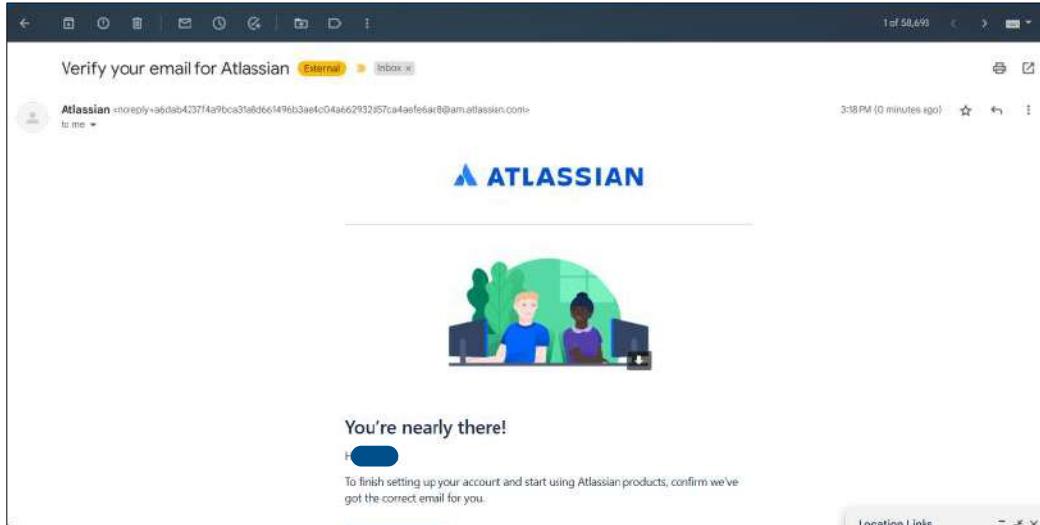
Below this, there's a "YOUSELECTED" section for Jira Software (Project and issue tracking). There are also "SELECT A SECOND PRODUCT" sections for Confluence (Document collaboration) and Jira Service Management (High-velocity ITSM). Both have "Select" buttons. At the bottom, there's a "Larger team? Compare plans" link and a "Next" button.

4. Enter your email id for registration

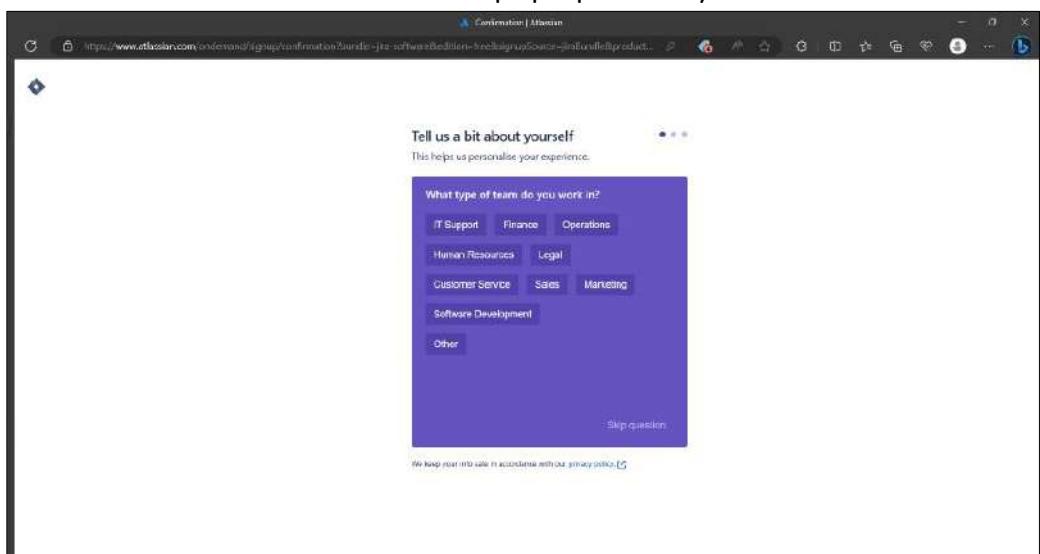


5. An email verification link will be sent to the email id you entered. Now verify the email id.

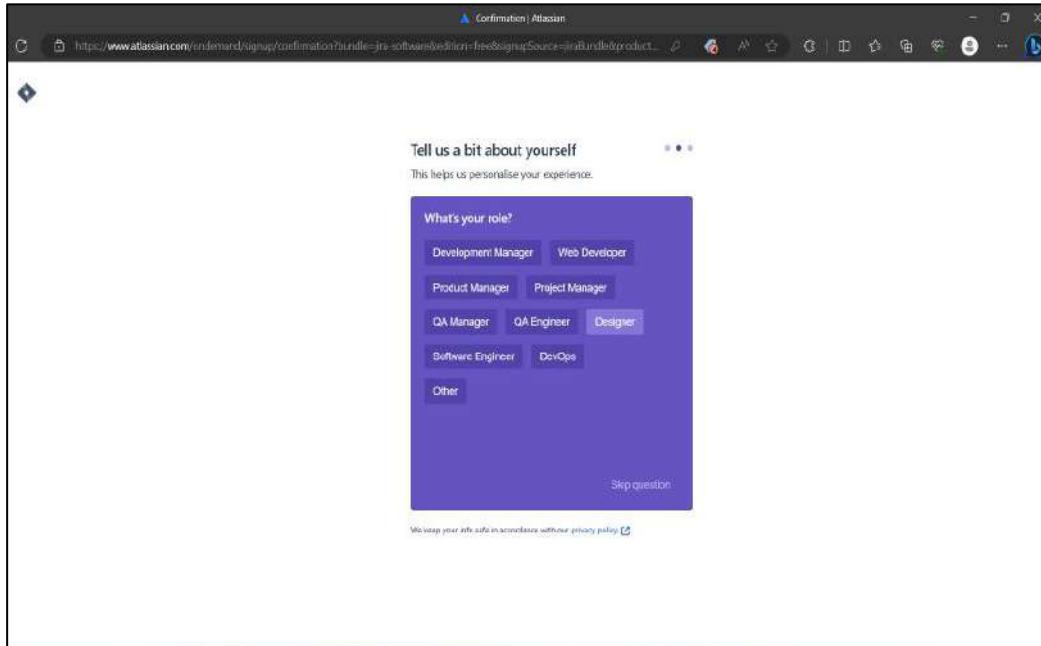




6. “Tell Us About Yourself” Box will pop up. Enter your Work Profile.

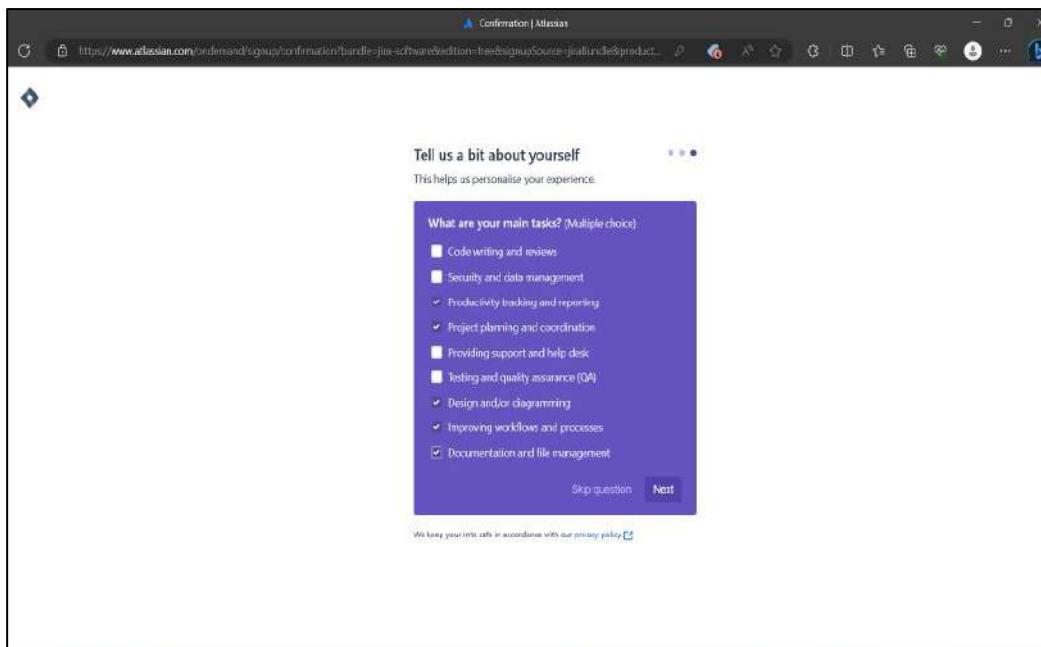


7. On the next prompt “Enter details about your role”



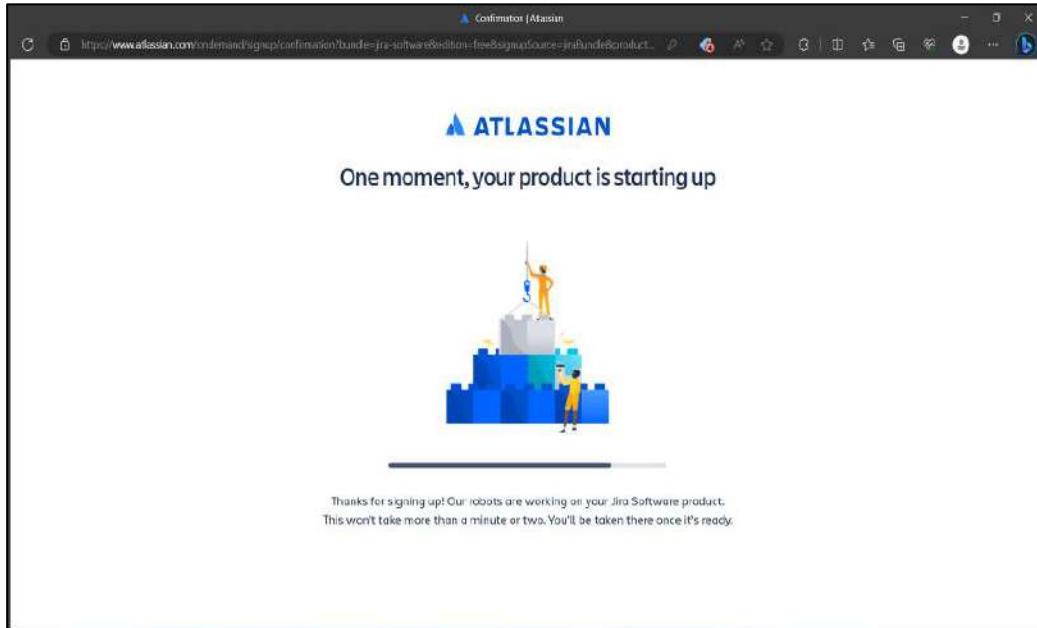
A screenshot of a web browser showing a sign-up confirmation page from Atlassian. The page has a purple header with the text "Confirmation | Atlassian". Below the header, there is a question "Tell us a bit about yourself" with the sub-instruction "This helps us personalise your experience." A purple box contains a list of roles: Development Manager, Web Developer, Product Manager, Project Manager, QA Manager, QA Engineer, Designer, Software Engineer, DevOps, and Other. At the bottom of the box are "Skip question" and "Next" buttons. A small note at the bottom states "We keep your info safe in accordance with our privacy policy.".

## 8. Now Enter your Tasks

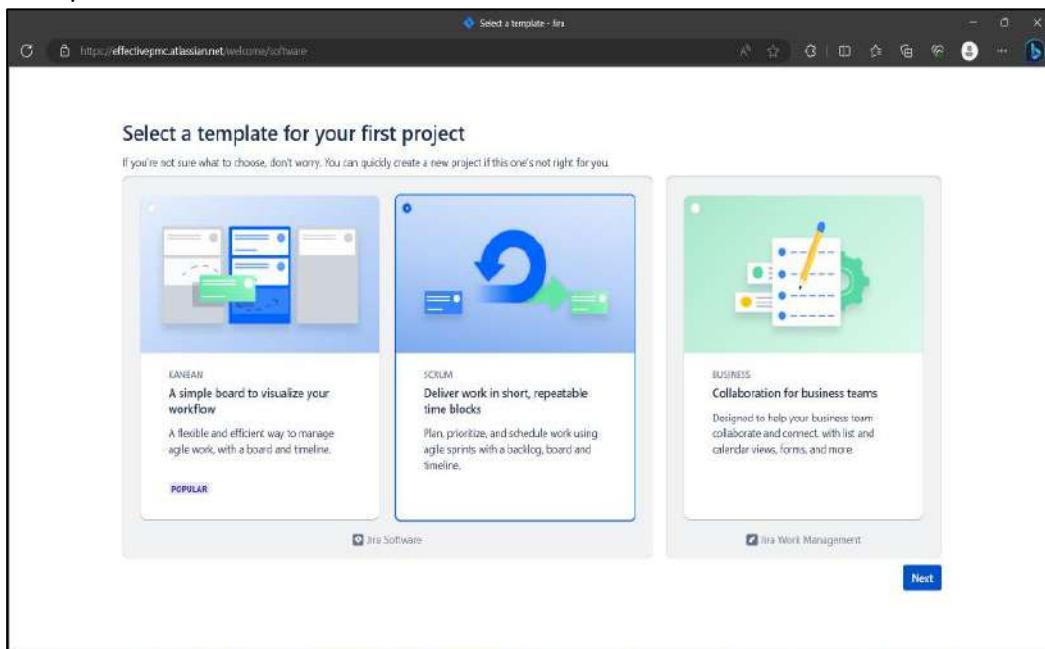


A screenshot of a web browser showing a sign-up confirmation page from Atlassian. The page has a purple header with the text "Confirmation | Atlassian". Below the header, there is a question "Tell us a bit about yourself" with the sub-instruction "This helps us personalise your experience." A purple box contains a list of tasks under the heading "What are your main tasks? (Multiple choice)": Code writing and review, Security and data management, Productivity tracking and reporting, Project planning and coordination, Providing support and help desk, Testing and quality assurance (QA), Design and/or diagramming, Improving workflows and processes, and Documentation and file management. Most of these tasks have checkboxes next to them, with some checked. At the bottom of the box are "Skip question" and "Next" buttons. A small note at the bottom states "We keep your info safe in accordance with our privacy policy.".

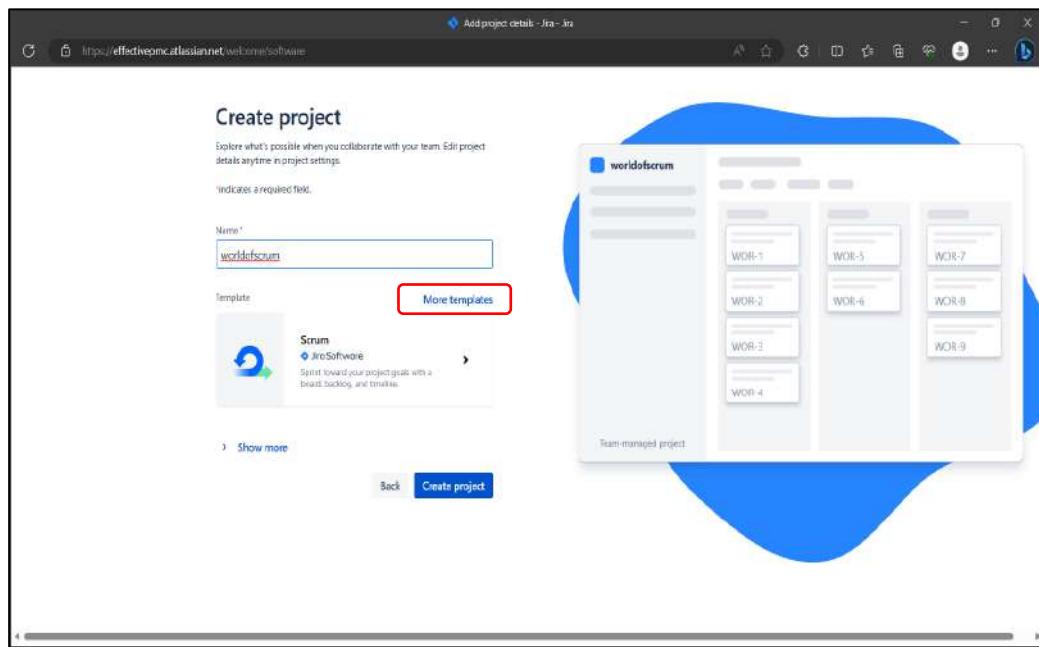
## 9. Now the setup will trigger.



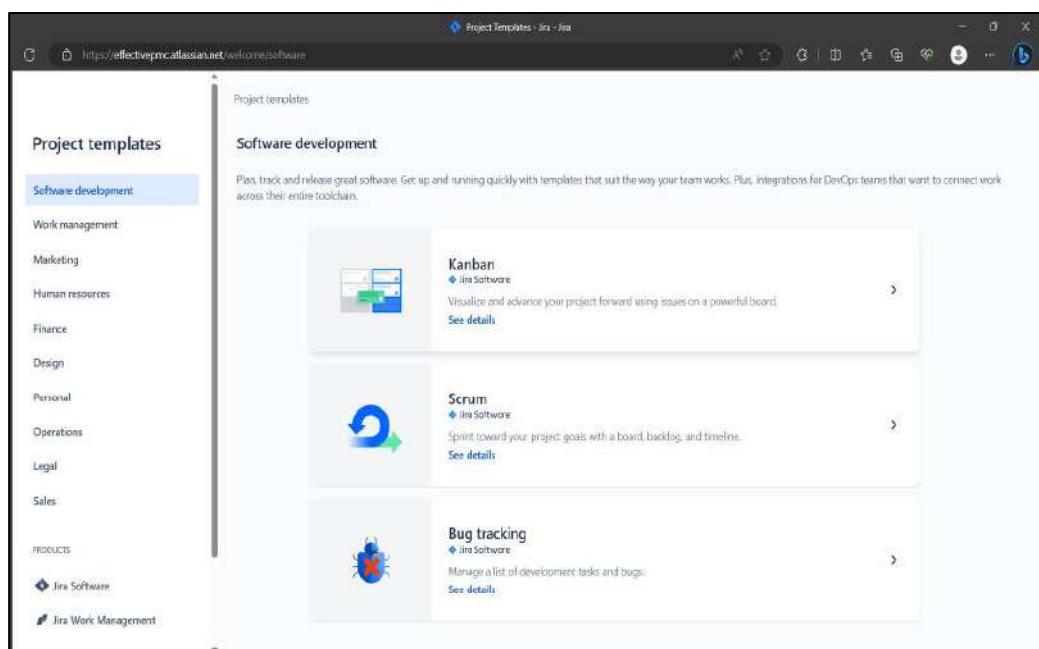
10. Setup will prompt to select the Project Type, It can be “Scrum” or “Kanban” or many more



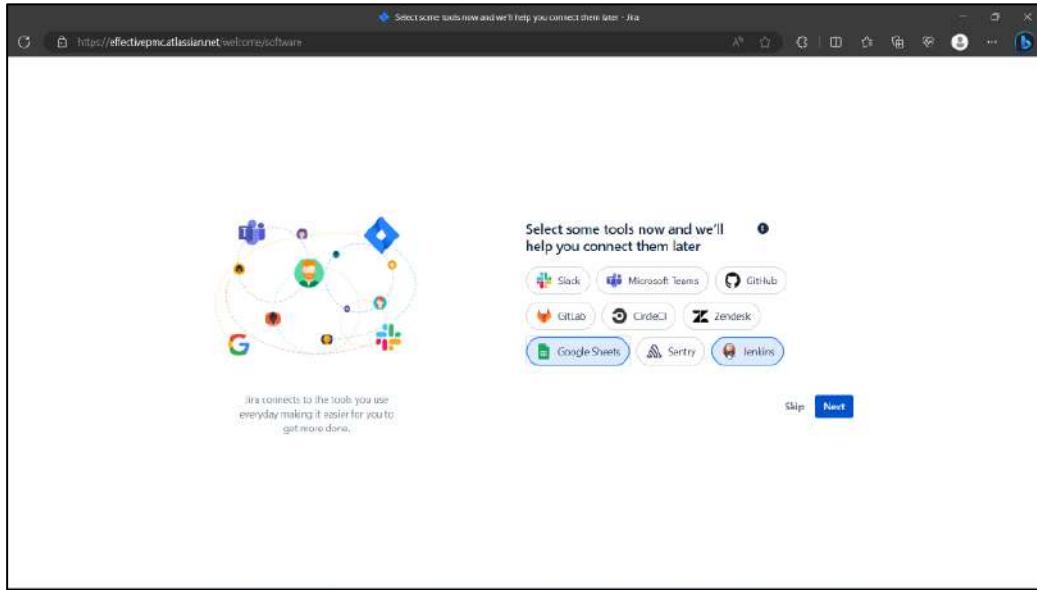
11. Name your project.



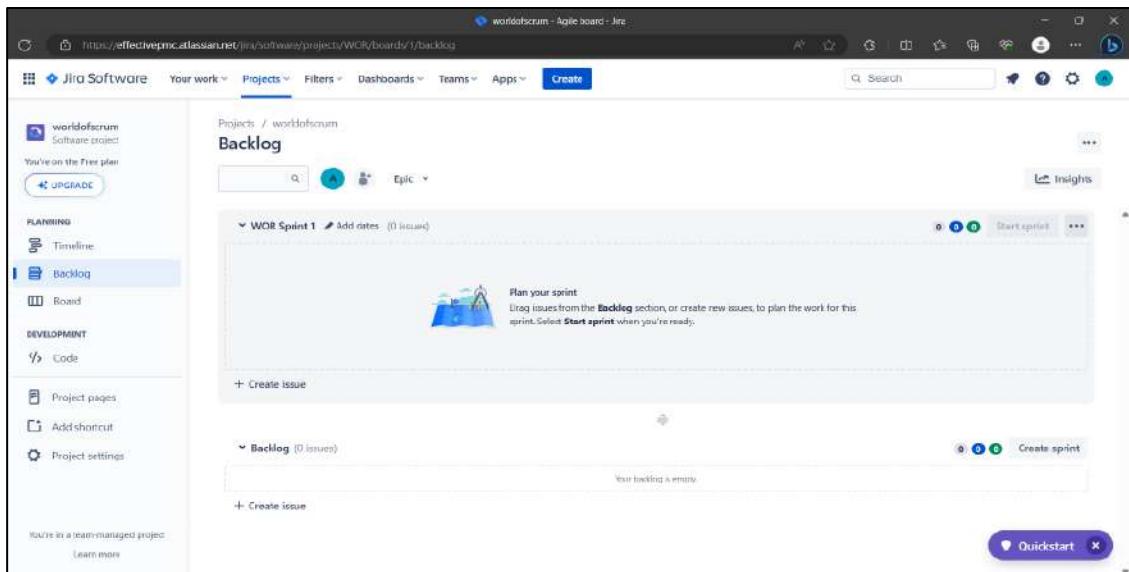
You can click on “More Templates” to view different project templates available.



12.If you want JIRA to work with other tools, pick them on the next screen.



13. After this final step, JIRA default dashboard will open to display your project. Start recording your project tasks and stories now.



## Use Server-Side Jira Instance

### System Requirements

Since JIRA is a web-application, it follows the concept of client/server. It means that JIRA can be installed centrally on a server and users can interact with it through web-browsers using a website from any computer.

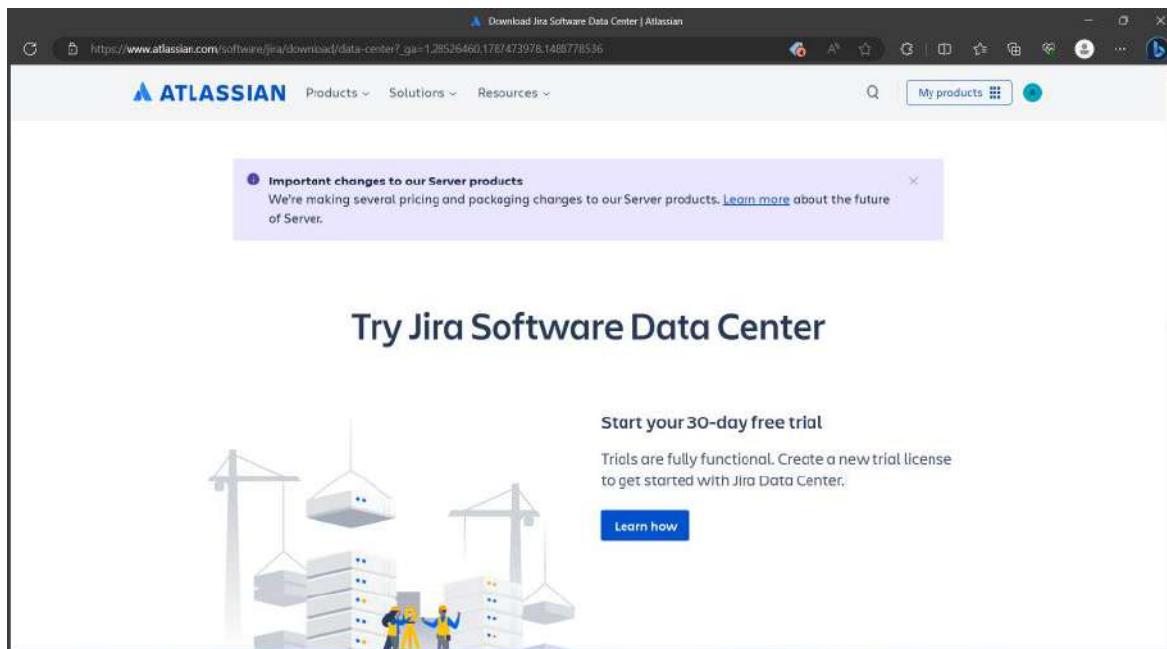
- **Browser** – JavaScript should be enabled, the user is recommended not to use any script-blocking tool like **NoScript** to access full functionality of JIRA.
- **JDK/JRE** – It is recommended to update JRE/JDK with the latest version. JIRA 9.0 recommends using JRE/JDK version 8.

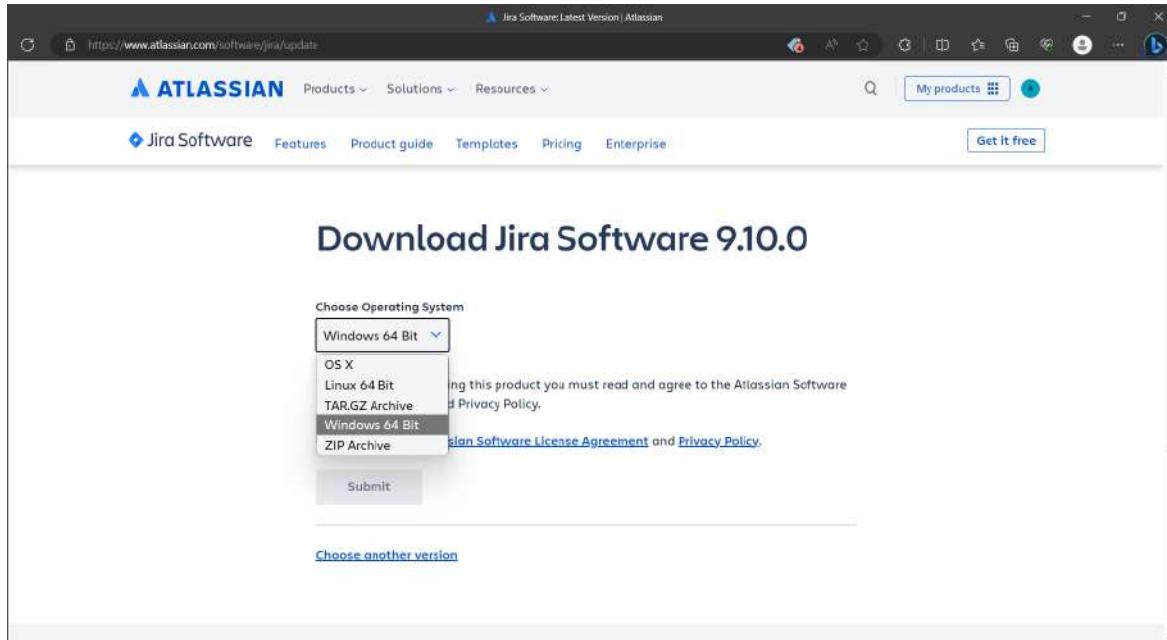
Since our scope is to consume the JIRA application as end users, we can ignore the server-side requirements.

Steps are as follows:

- JIRA follows the Client/Server concept. At the server side, JIRA must be installed before using it as end user.
- At the server side, JIRA must connect with relation database to store issues/application data.
- Download the JIRA **Windows Installer.exe** file from the following link – [https://www.atlassian.com/software/jira/download?\\_ga=1.28526460.1787473978.1488778536](https://www.atlassian.com/software/jira/download?_ga=1.28526460.1787473978.1488778536).
- Select the OS type and click on Download.

The following screenshot shows how to download the **.exe** file for a specific OS.





Jira Software: Latest Version | Atlassian

ATLASSIAN Products Solutions Resources

Get it free

## Download Jira Software 9.10.0

Choose Operating System

Windows 64 Bit

OS X

Linux 64 Bit

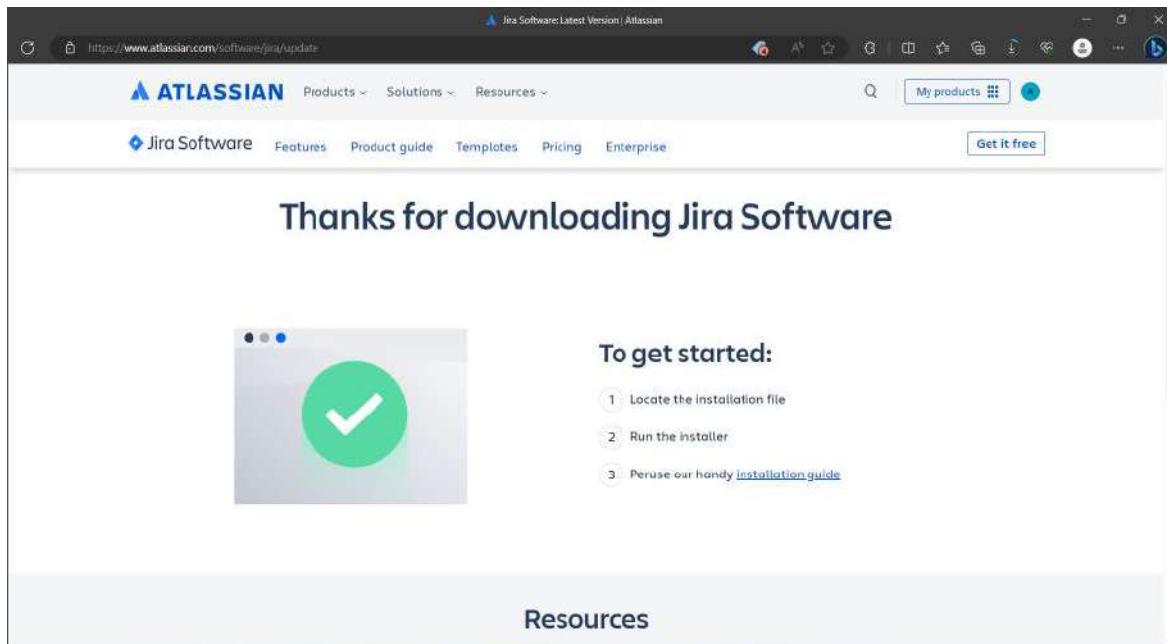
TAR.GZ Archive

Windows 64 Bit

ZIP Archive

Submit

[Choose another version](#)



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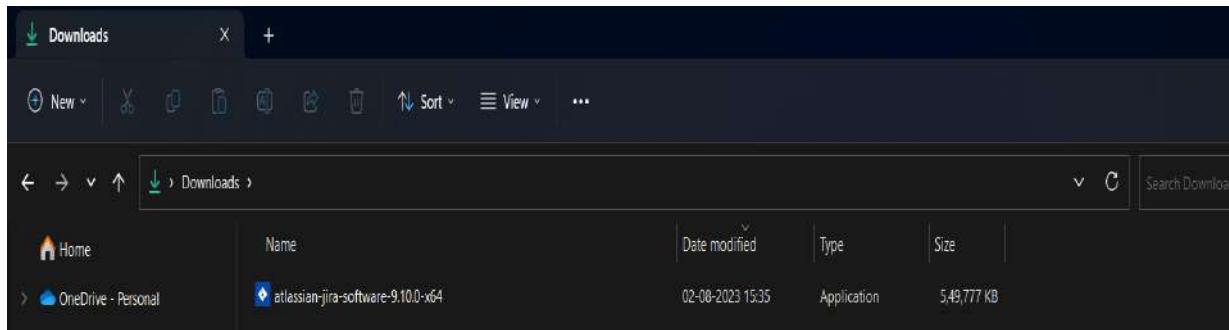
## Thanks for downloading Jira Software

To get started:

- Locate the installation file
- Run the installer
- Peruse our handy [installation guide](#)

Resources

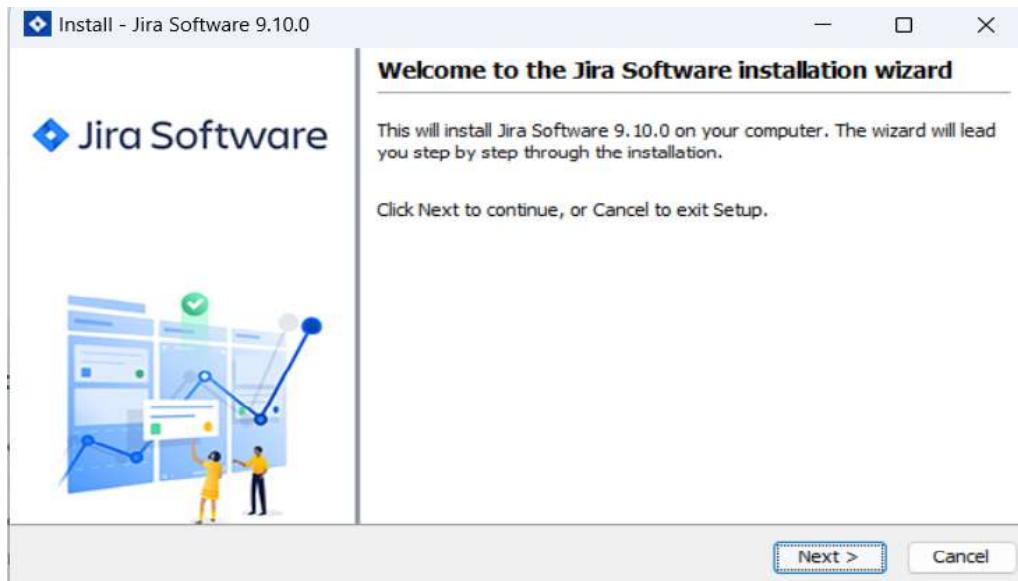
Run the .exe file to run the installation wizard. The following screenshot shows the downloaded .exe file.



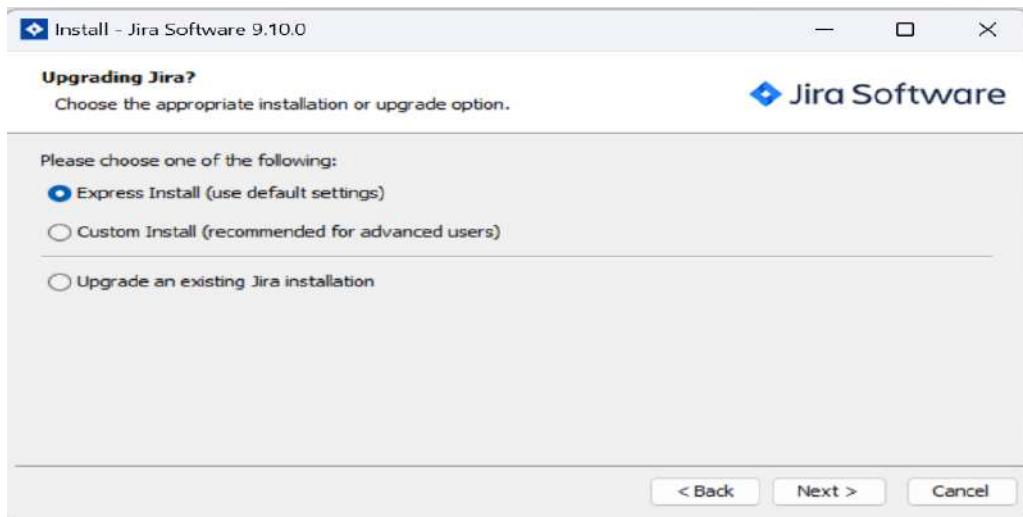
After clicking the .exe file, the **Run** confirmation pop-up displays, click on RUN. The following screenshot shows the RUN confirmation pop-up.



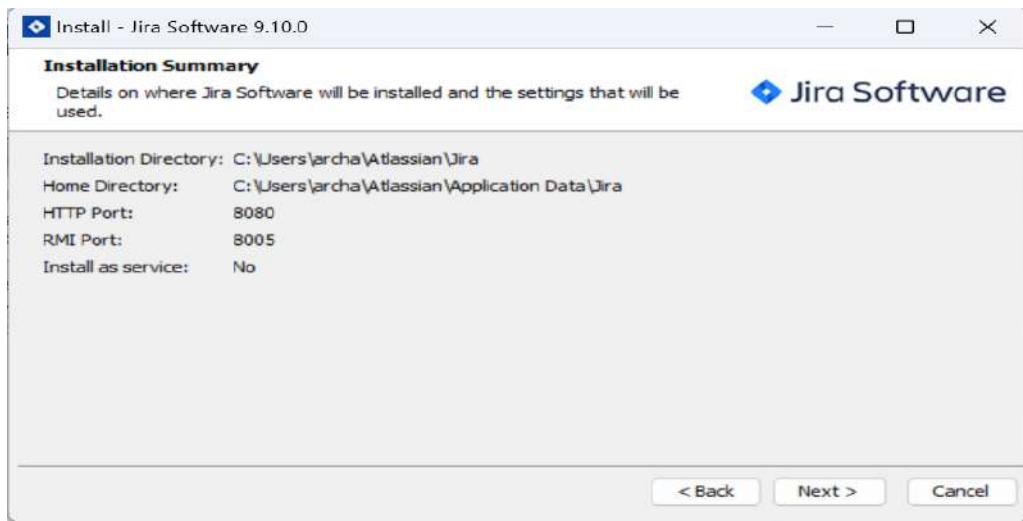
The following JIRA installation wizard displays, click on Next.



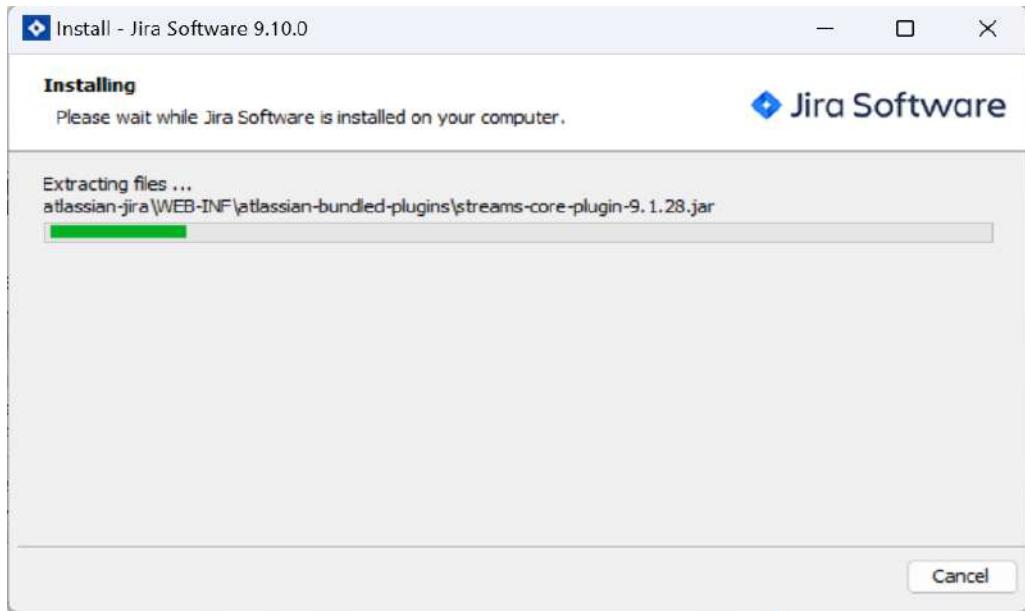
Choose the appropriate installation option as shown in following screenshot and then click on Next.



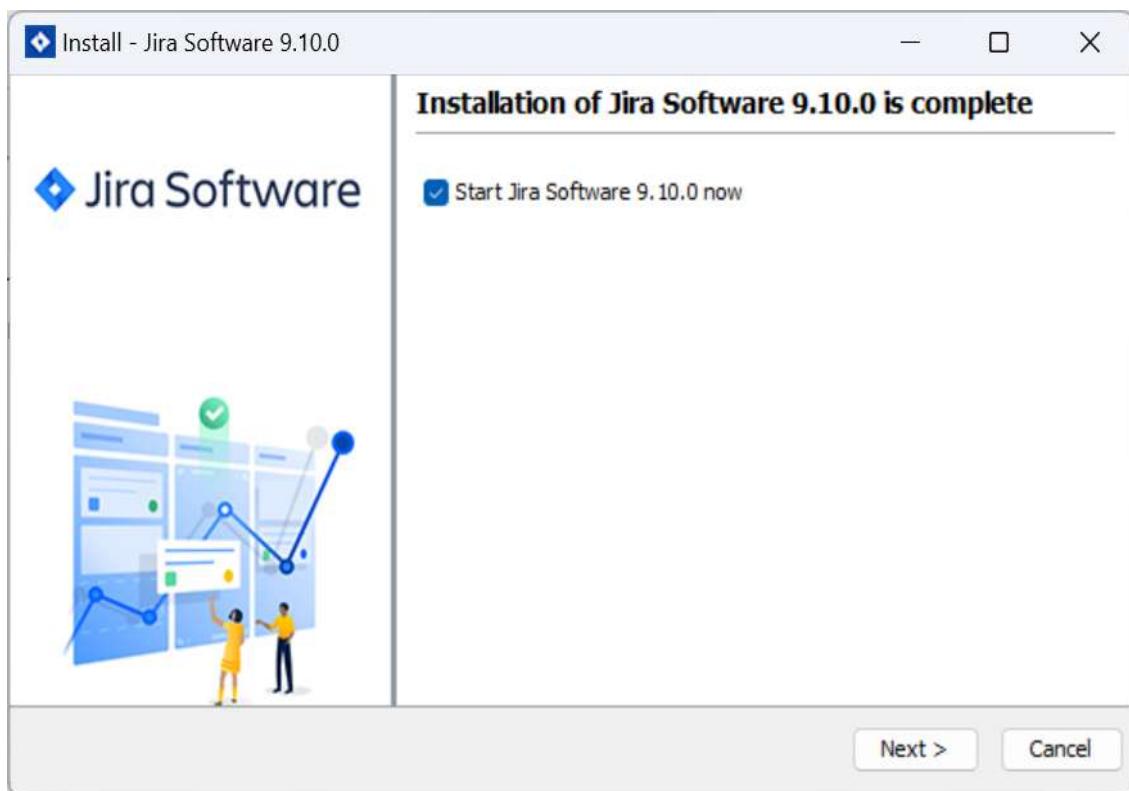
The installation summary is displayed with the Destination Directory, Home Directory, TCP Ports, etc., as shown in the following screenshot.



Click on Install. JIRA will start installing as displayed in following screenshot. It takes a couple of minutes to finish the installation.



After installation, JIRA will be started automatically if the check box to “Start JIRA Software 9.10.0 now” is checked. Then click on Next, if not, it can be accessed using the appropriate Windows Start Menu shortcut.

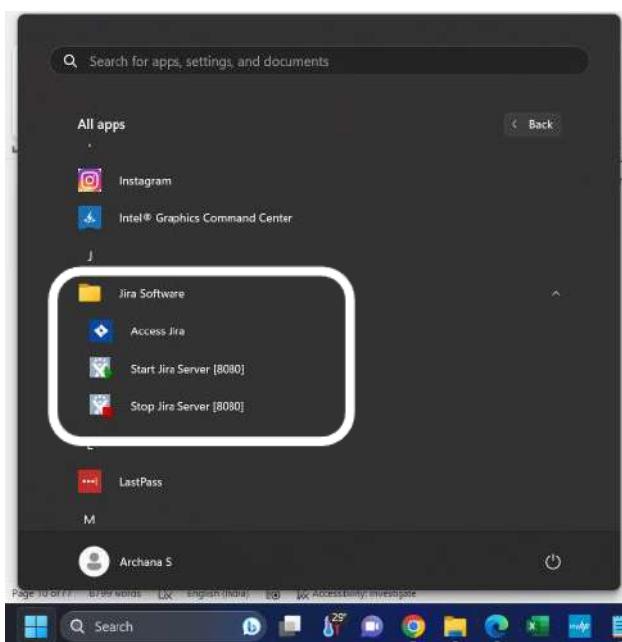


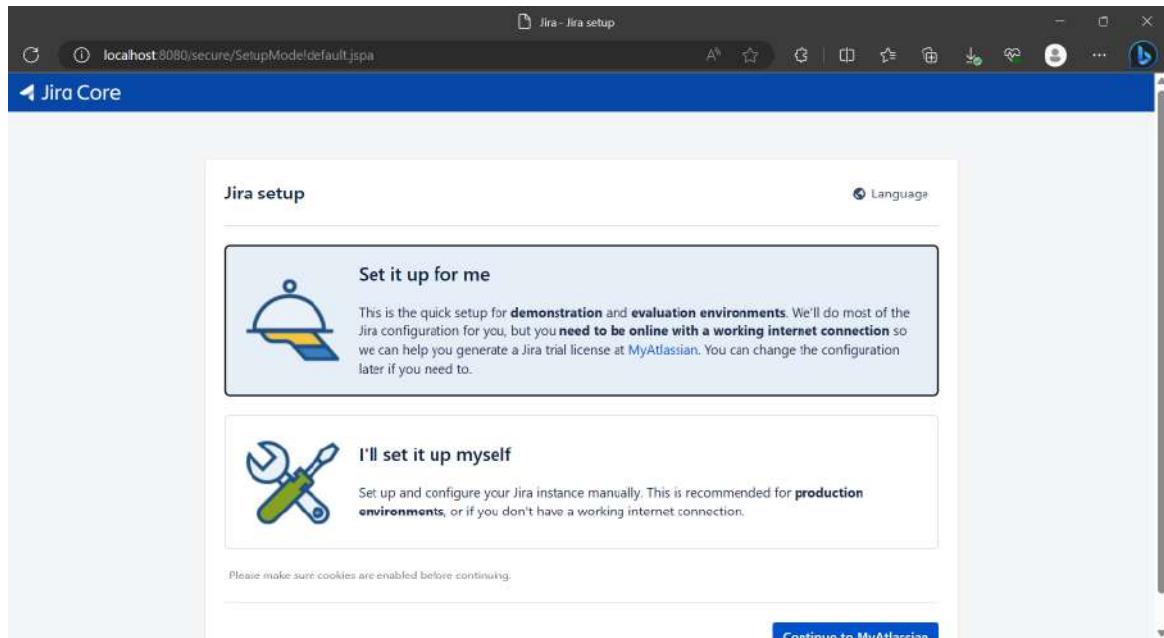
Click the Finish button.

The installer will create the following shortcuts on the start menu –

- Access JIRA
- Start JIRA Server
- Stop JIRA server
- Uninstall JIRA

The following screenshot shows the above-mentioned shortcuts –





Jira - Jira setup

localhost:8080/secure/SetupModeldefault.jspa

◀ Jira Core

Jira setup

Set it up for me

This is the quick setup for **demonstration** and **evaluation environments**. We'll do most of the Jira configuration for you, but you **need to be online with a working internet connection** so we can help you generate a Jira trial license at [MyAtlassian](#). You can change the configuration later if you need to.

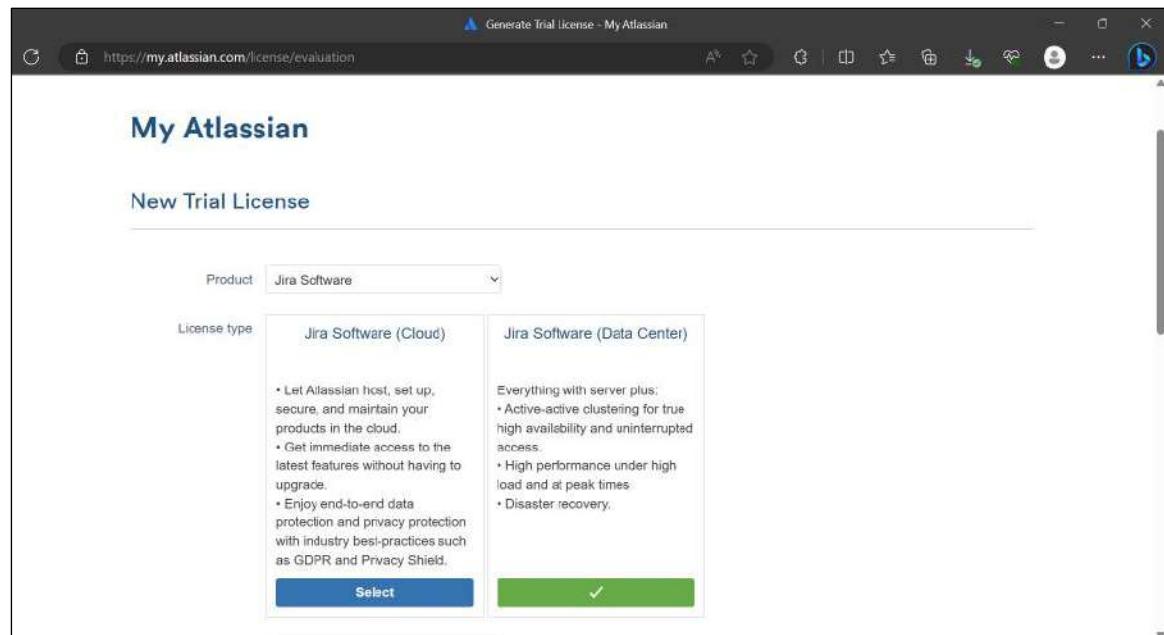
I'll set it up myself

Set up and configure your Jira instance manually. This is recommended for **production environments**, or if you don't have a working internet connection.

Please make sure cookies are enabled before continuing.

Continue to MyAtlassian

Select the license type and enter organization name as shown in following screenshot –



Generate Trial License - My Atlassian

https://my.atlassian.com/license/evaluation

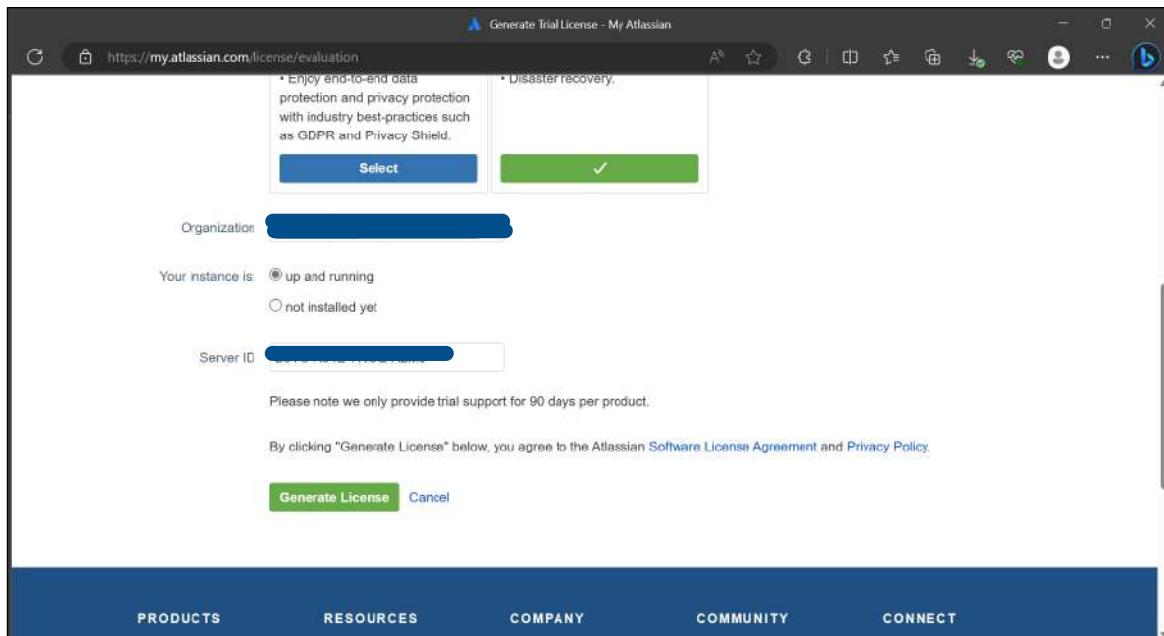
My Atlassian

New Trial License

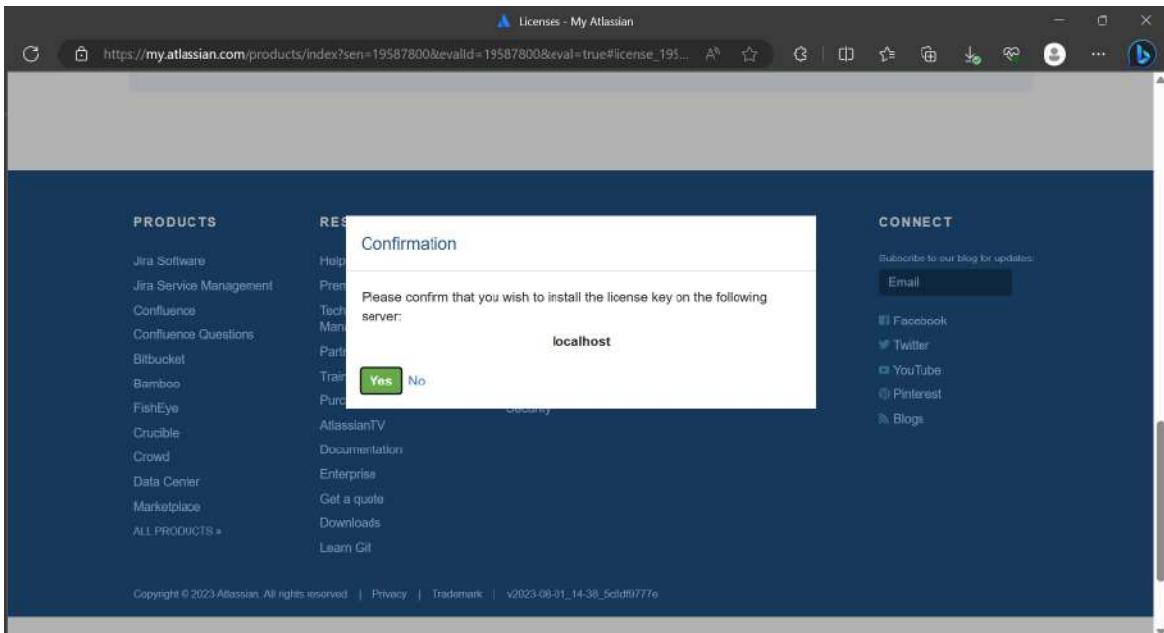
Product: Jira Software

License type	Jira Software (Cloud)	Jira Software (Data Center)
	<ul style="list-style-type: none"><li>Let Atlassian host, set up, secure, and maintain your products in the cloud.</li><li>Get immediate access to the latest features without having to upgrade.</li><li>Enjoy end-to-end data protection and privacy protection with industry best-practices such as GDPR and Privacy Shield.</li></ul> <p>Select</p>	<p>Everything with server plus:</p> <ul style="list-style-type: none"><li>Active-active clustering for true high availability and uninterrupted access.</li><li>High performance under high load and at peak times</li><li>Disaster recovery.</li></ul> <p>✓</p>

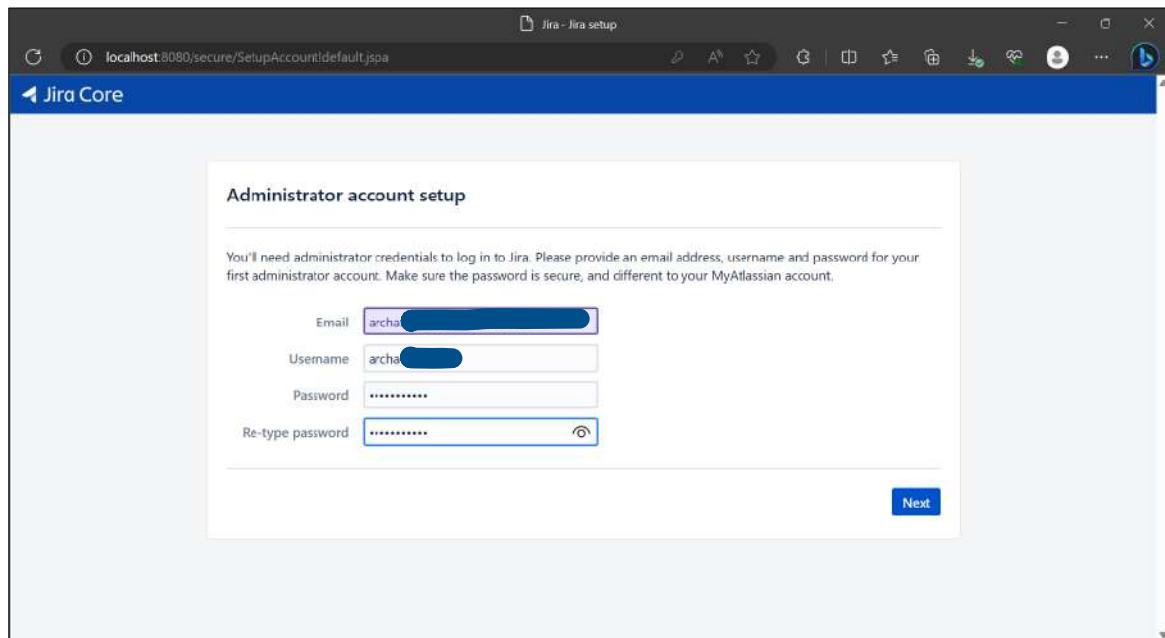
Click on Generate License



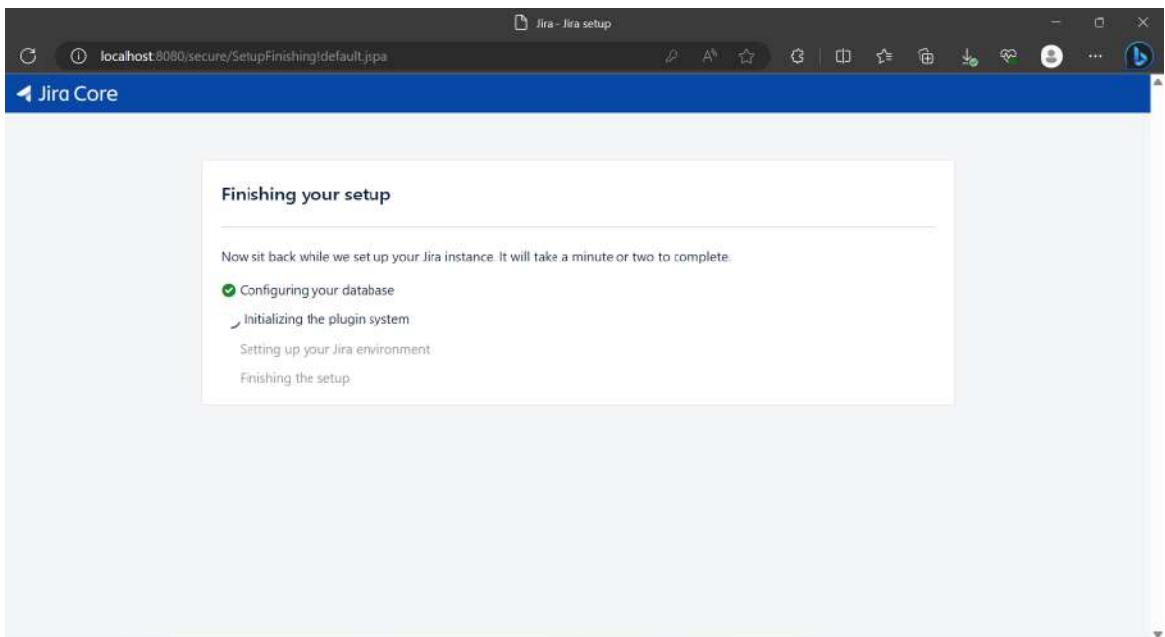
A confirmation pop-up will display as shown in the following screenshot. Click on Yes.



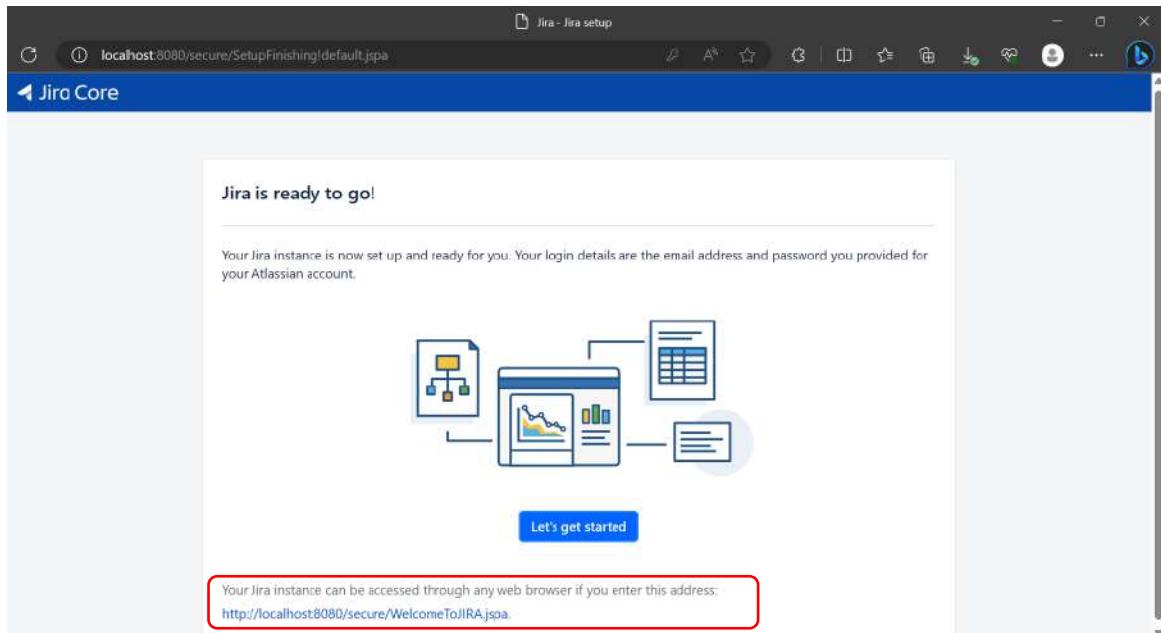
Set up the administration account as displayed in the following screenshot.



JIRA will automatically finish the setting-up as shown below –

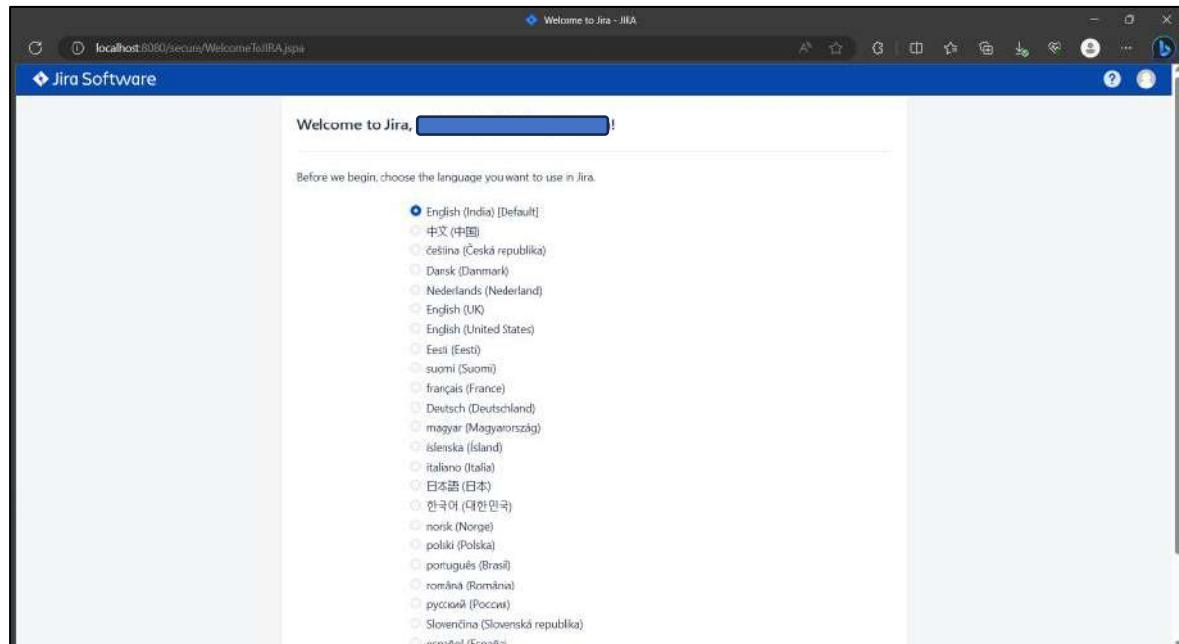


Once JIRA finishes the setup and starts running in the server, the user can access it from a browser on any computer with network access to the JIRA server.

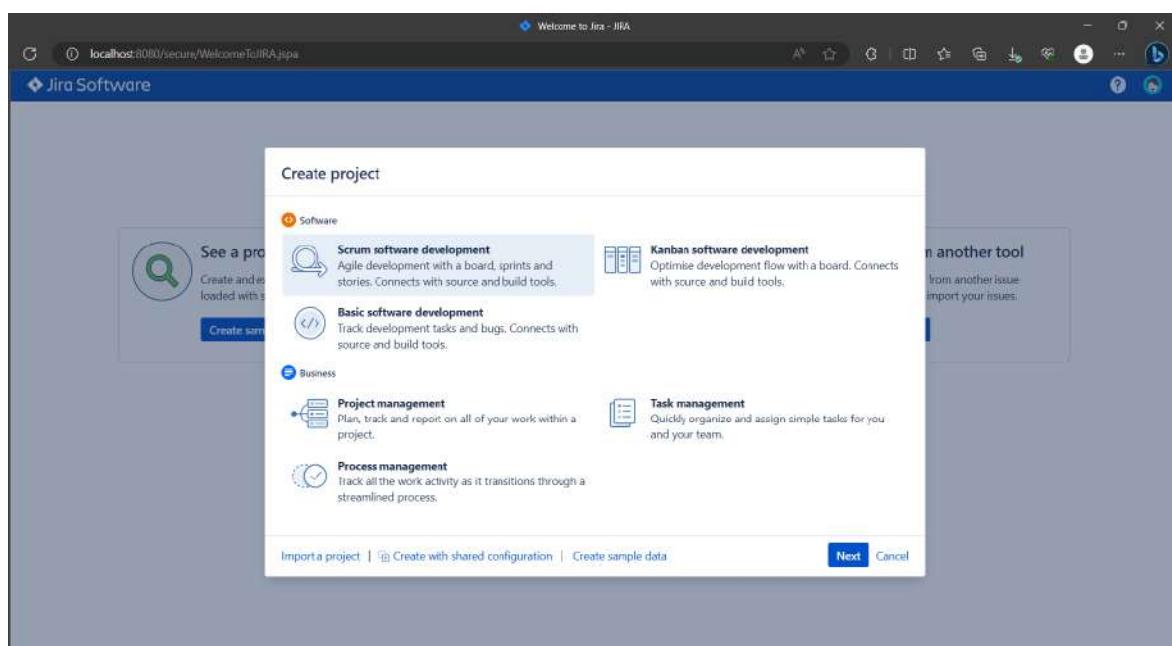
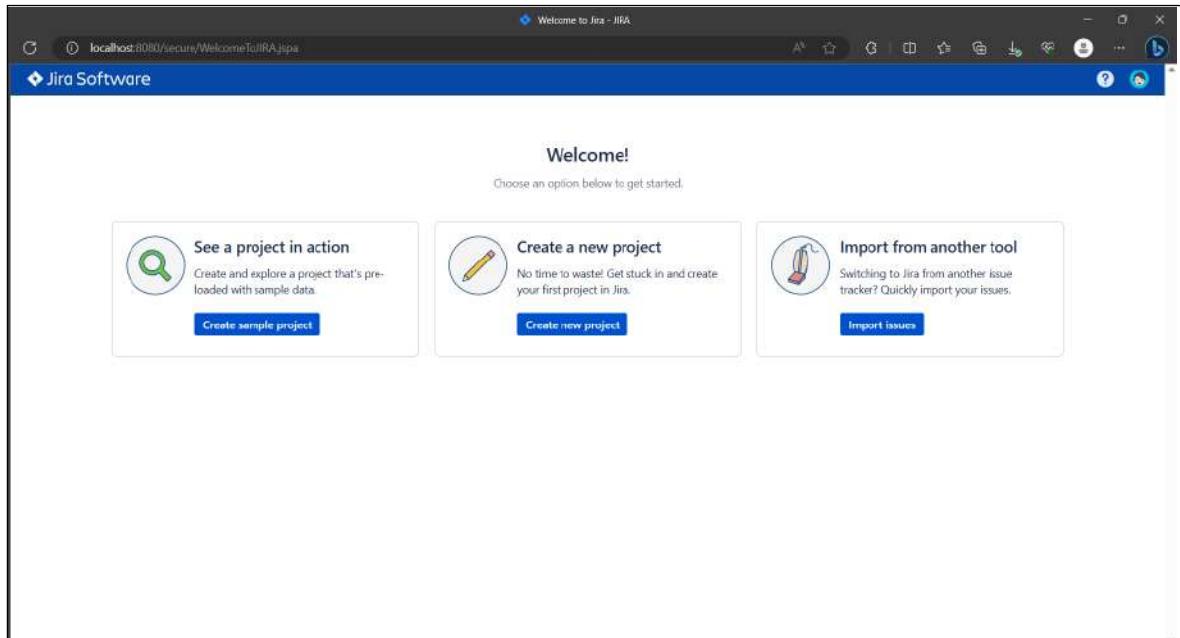


Link for the server is displayed at the bottom of the screen.

Choose the language.

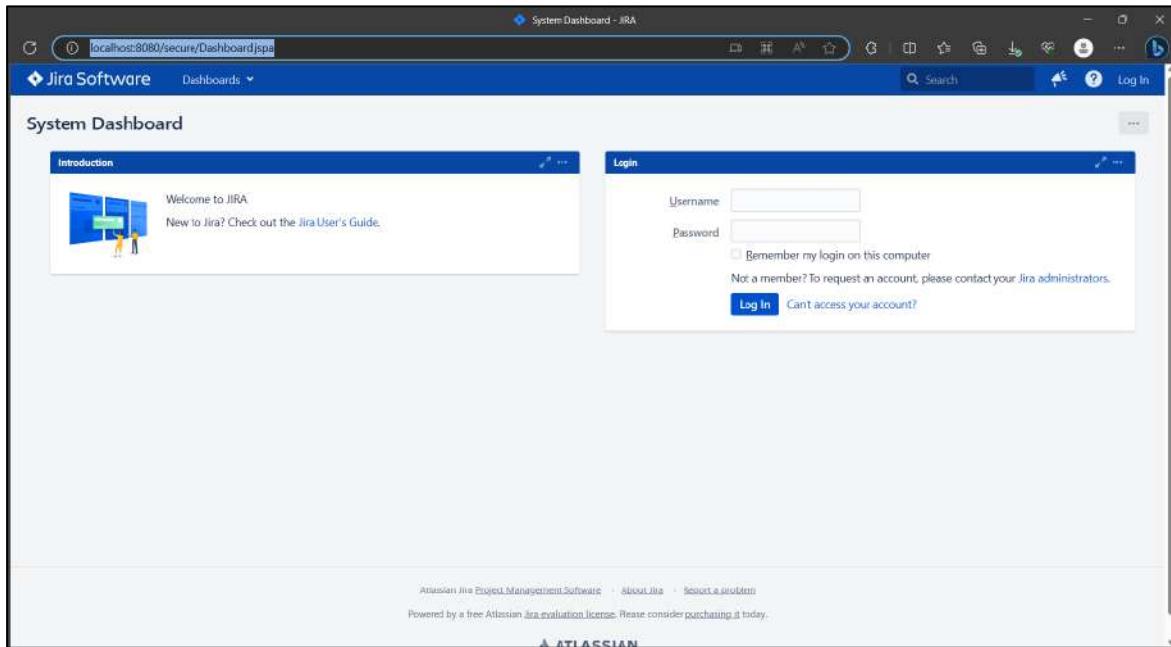


Now you are Ready to Go....!!!



## How to Login to Jira?

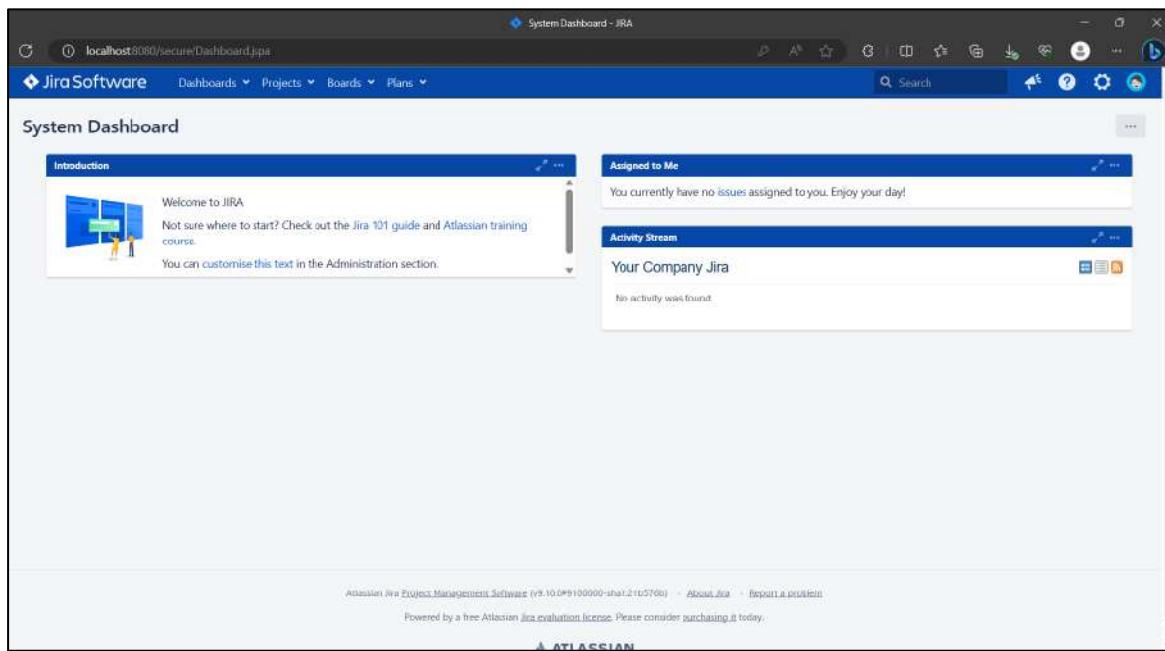
To login to JIRA, go to your sample website. (Like [System Dashboard - JIRA](#)) It will open a login page. Fill in your registered email address/username and Password. Click on the Login button. The following screenshot shows how to login into JIRA using your credentials.



## Successful Login

On a successful login, the system dashboard will display if the account is associated with any project by the admin, or if a user can create a sample project as explained in the earlier chapters.

The following screenshot displays the welcome page/dashboard of JIRA on a successful login.



## What is on Jira Dashboard?

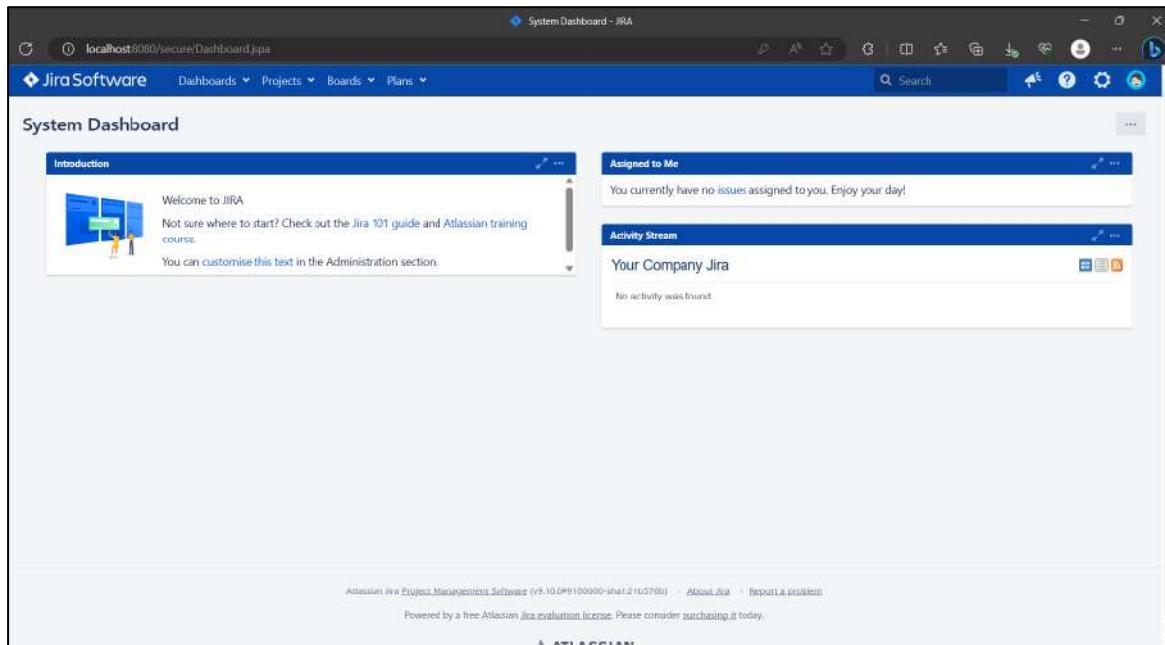
After logging into JIRA, the Dashboard is the first page that shows up. The Dashboard is customized by the Admin. Based on the roles, the admin can set the access of JIRA. Even the admin has the right to change colors and the logo of JIRA.

### Important Points of the Dashboard

Following are some of the most significant points the users should understand before using the JIRA Dashboard –

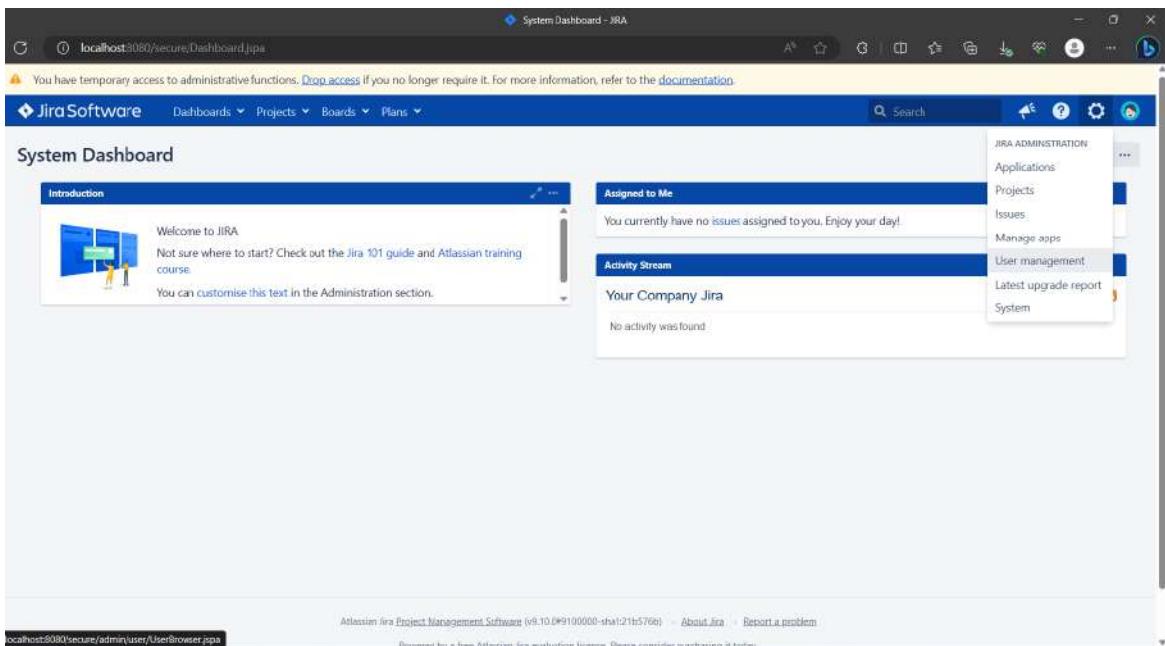
- The navigation bar, present at the top of the JIRA page, will be the same across all the pages/screens of JIRA. Dashboard, Projects, Issues, Boards and Create are the main links. These links have many sub-links to navigate other functionalities.
- Navigation bar contains links that provides a quick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

The following screenshot shows the overview of the Dashboard page of JIRA –



The screenshot shows the Jira System Dashboard. At the top, there's a navigation bar with links for Jira Software, Dashboards, Projects, Boards, and Plans. Below the navigation is a section titled "System Dashboard". This section contains three main cards: "Introduction" (with a welcome message and a "Jira 101 guide" link), "Assigned to Me" (stating "You currently have no issues assigned to you. Enjoy your day!"), and "Activity Stream" (showing "Your Company Jira" and "No activity was found"). At the bottom of the page, there's footer information about Atlassian Jira Project Management Software version 9.10.0#9100000-sha1:21f576b, links to About Jira and Report a problem, and a note about a free evaluation license.

Click on “Administration” icon to access “Administrative Task Menu” to create Global Projects or User Management or Issue Management.



This screenshot is similar to the one above, showing the Jira System Dashboard. However, the "Administration" icon in the top right corner is highlighted with a yellow box, and a dropdown menu is visible. The menu lists several administrative tasks: Applications, Projects, Issues, Manage apps, User management, Latest upgrade report, and System. The rest of the dashboard and footer are identical to the first screenshot.



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Now Let's look at the different Workflow feature & setting which can be setup in JIRA. For all the next section we will be using the Web based JIRA Instance.

## *What is a Jira Project?*

A project is simply a collection of issues (stories, bugs, tasks, etc). You would typically use a project to represent the development work for a product, project, or service in Jira Software.

A Project contains issues; a JIRA project can be called as a collection of issues. A JIRA Project can be of several types. For example –

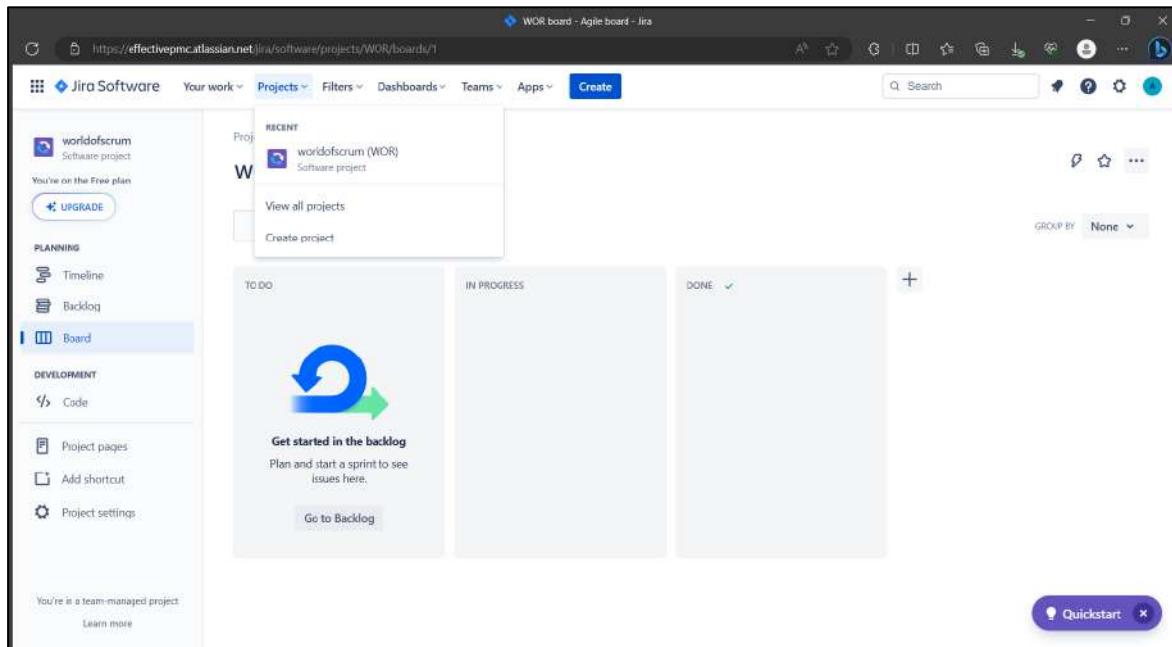
- Software Development Project
- Marketing Project
- Migration to another platform project
- Help Desk Tracking Project
- Leave Request Management System
- Employee Performance System
- Website Enhancement

## *Types of Projects*

The Projects link has several sub-links, which are explained in detail for better understanding –

- **Recent Project** – It displays the name of the recent project that the user has accessed, if exists, where the user can navigate by clicking on the project listed under this header.
- **Software** – It is the sub-link to navigate the list of projects, which are listed in the Project Type as Software.
- **Business** – It is also a project-type. By clicking here, it will display the list of business project types.
- **View all Projects** – It displays all the projects, which are associated with the logged in user.
- **Create Project** – This link is usually accessed by the Admin or it depends on various roles. If this link is visible, a user can create a new project by following the instructions given there.

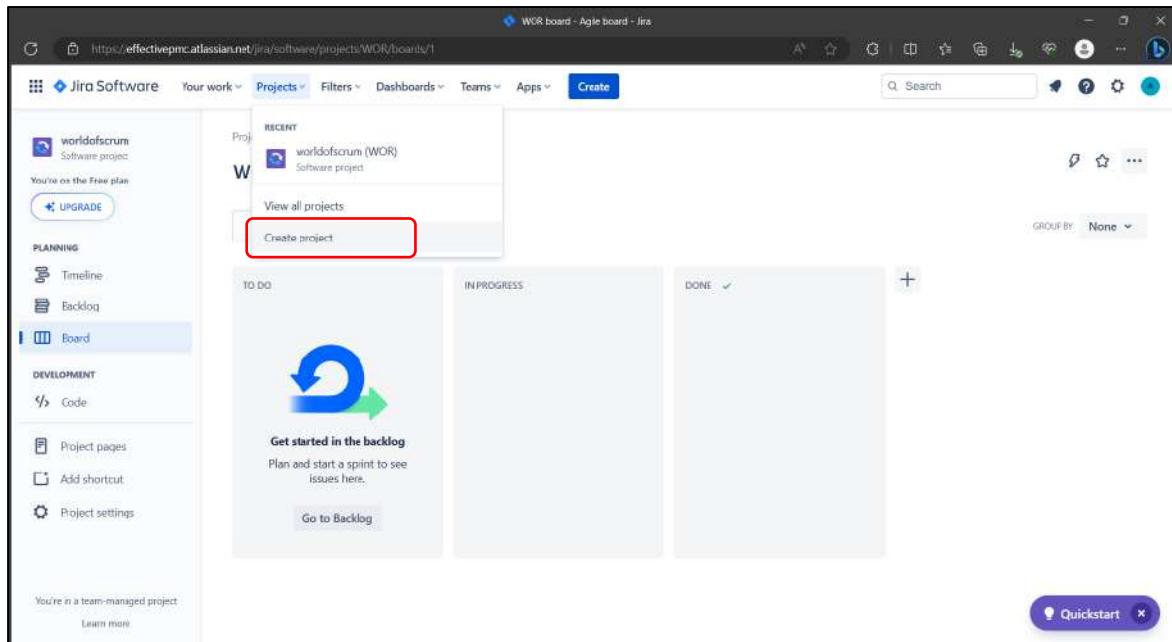
The following screenshot shows the different sub-links under the Project category.



## Create a New Project

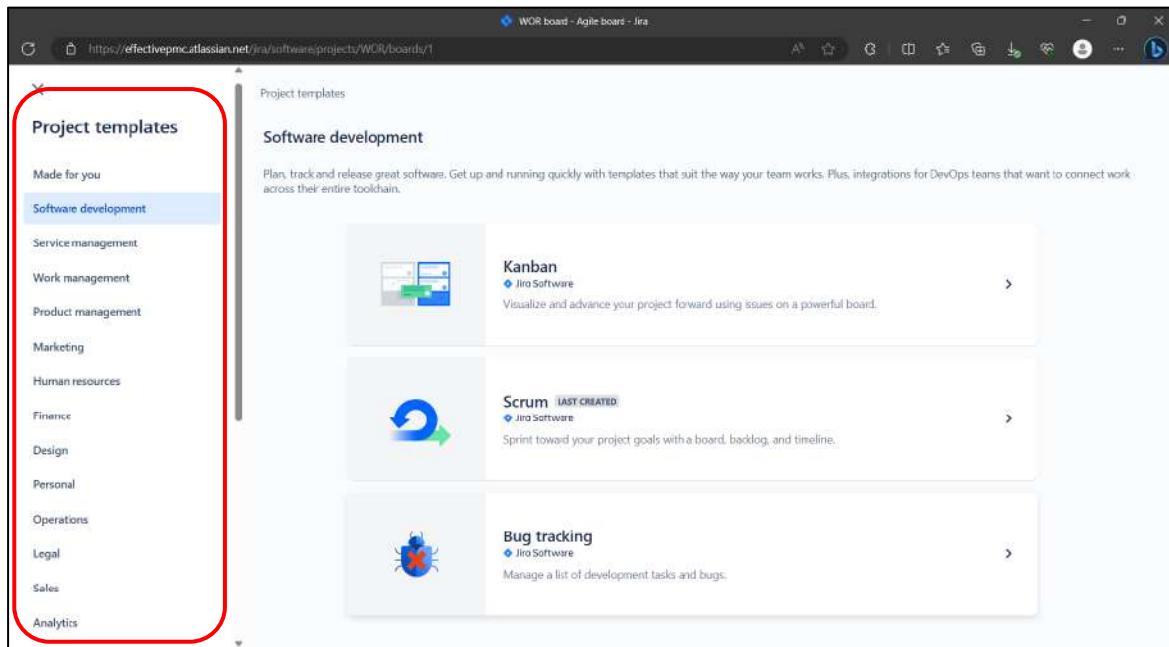
To create a project, the user should login as a JIRA Admin and then Click on Project → Create Project.

The following screenshot shows how to reach to the **Create Project** button from the Dashboard.



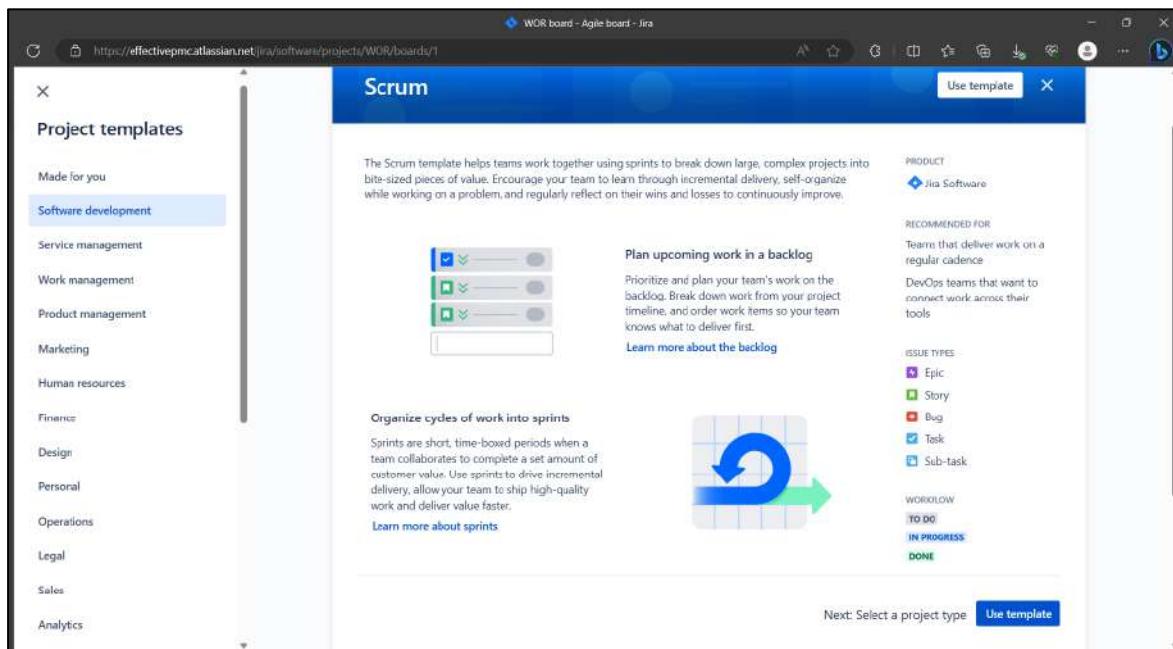
Choose the type of Project that suits your requirement and the process it should follow.

The following screenshot displays the type of projects available in JIRA.



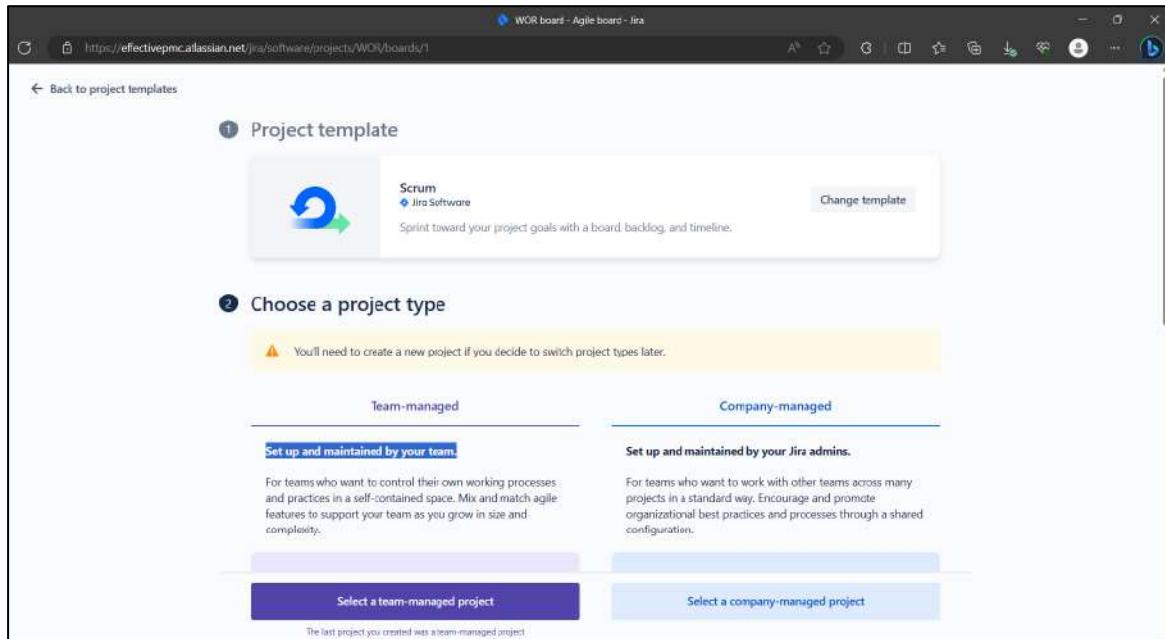
Once the type of project is selected, click on Next. The user will see the flow of the project based on the selection. Here, we have selected **Software development**.

The following screenshot displays the available issue types and the workflow for the chosen project in the step mentioned above –



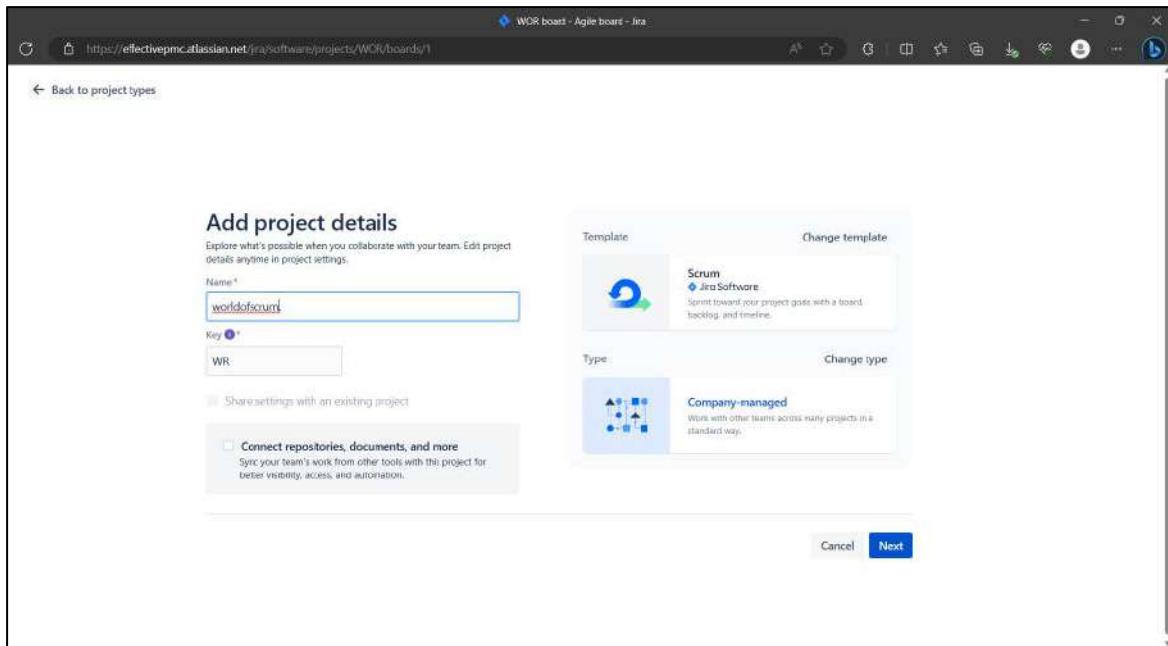
Click on the “Use Template” button.

Now on the next screen you will be asked to choose the project Type. Either **Team-managed** or **Company-managed** (Refer Server-side Setup for detail)

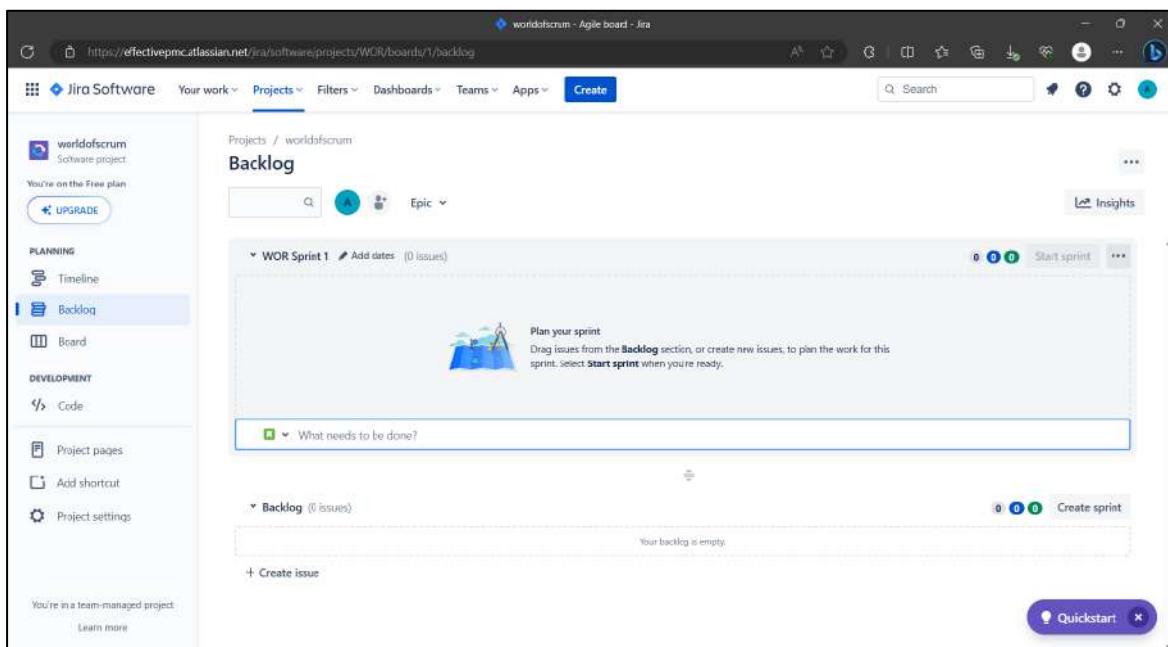


Now “Add Project Details”

- Enter Project Name



The following screenshot displays dashboard presented after creation of a project.





## What are issues in Jira?

JIRA uses issues to track all the tasks. An issue helps to track all works that underlie in a project. In real time, every work or task either technical, non-technical, support or any other type of a project in JIRA are logged as an issue.

An issue can be dependent on the organization and requirements –

- Story of a project
- Task of a story
- Sub-task of a story
- A defect or bug can be an issue
- Helpdesk Ticket can be logged as issue
- Leave Request

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

### Example

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

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

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

## Types of Issues

It has many sub links to access other functionalities. The following screenshot shows different available issue types. To see the issue types available for your project navigate to “Project-> Project settings -> Issue types”

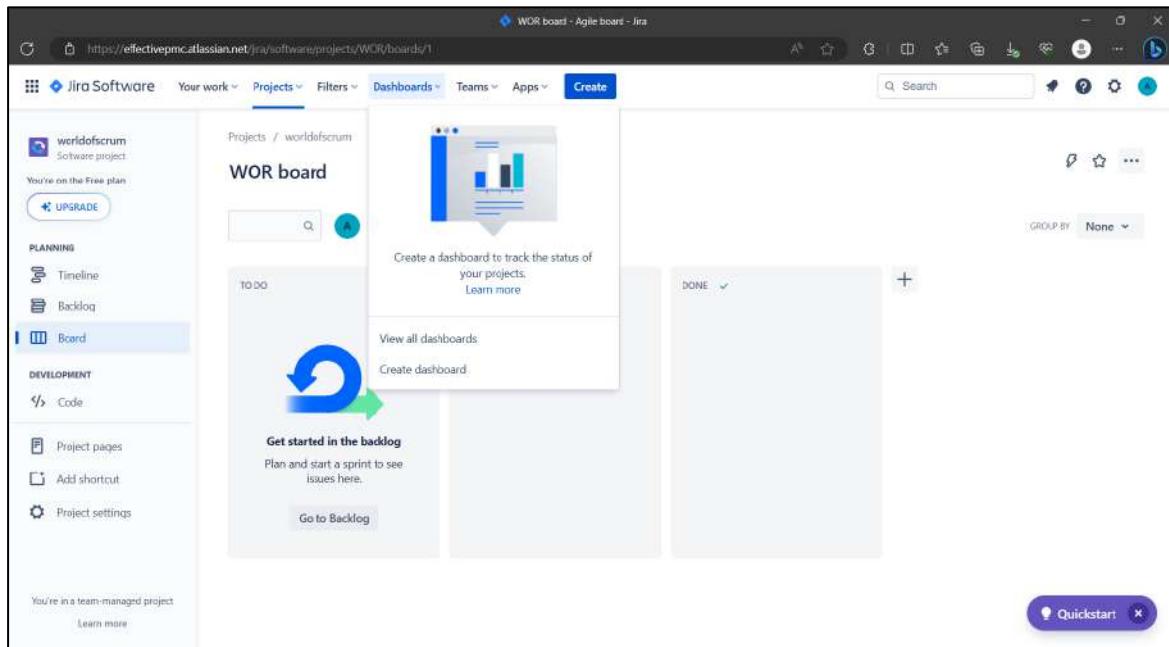
The screenshot shows the Jira Software interface for managing issue types. On the left, there's a sidebar with 'Issue types' listed under 'Project settings'. Under 'Issue types', 'Bug' is selected, highlighted with a blue background. Other options include 'Epic', 'Story', 'Task', and 'Subtask'. A link to '+ Add issue type' is also visible. The main content area shows the configuration for the 'Bug' issue type. It includes sections for 'Description fields' (with 'Summary' and 'Description' fields) and 'Context fields' (with 'Status', 'Assignee', 'Labels', 'Sprint', and 'Story point estimate'). On the right, there's a panel titled 'Fields' containing various field types: Short text, Paragraph, Date, Number, Time stamp, Labels, Dropdown, Checkbox, People, Dependent dropdown, and URL. A search bar at the bottom right allows for finding specific fields.

## Types of Boards

Boards are showcase of process that is followed by Project. It could be the most famous Agile Board if the project is following the agile methodology or it might be the Kanban board as well.

- **Recent Board** – It displays the recent project board accessed by the user.
- **View all boards** – It displays all available project boards.

The following screenshot shows the different sub-links available under the board section.



## What are issue types in Jira?

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

An Issue is classified as follows –

- **Epic** – A big user story that needs to be broken down. Created by JIRA Software - do not edit or delete.
- **Bug** – A problem that impairs or prevents the functions of the product.
- **Improvement** – An improvement or enhancement to an existing feature or task.
- **New Feature** – A new feature of the product, which is yet to be developed.
- **Story** – A user story. Created by JIRA Software - do not edit or delete.
- **Task** – A task that needs to be done to achieve team's goal.
- **Sub-Task** – This is the sub-task of an issue. In a logged issue, there can be different tasks to resolve it, which are called as sub-tasks.

## JIRA – Scrum Workflow

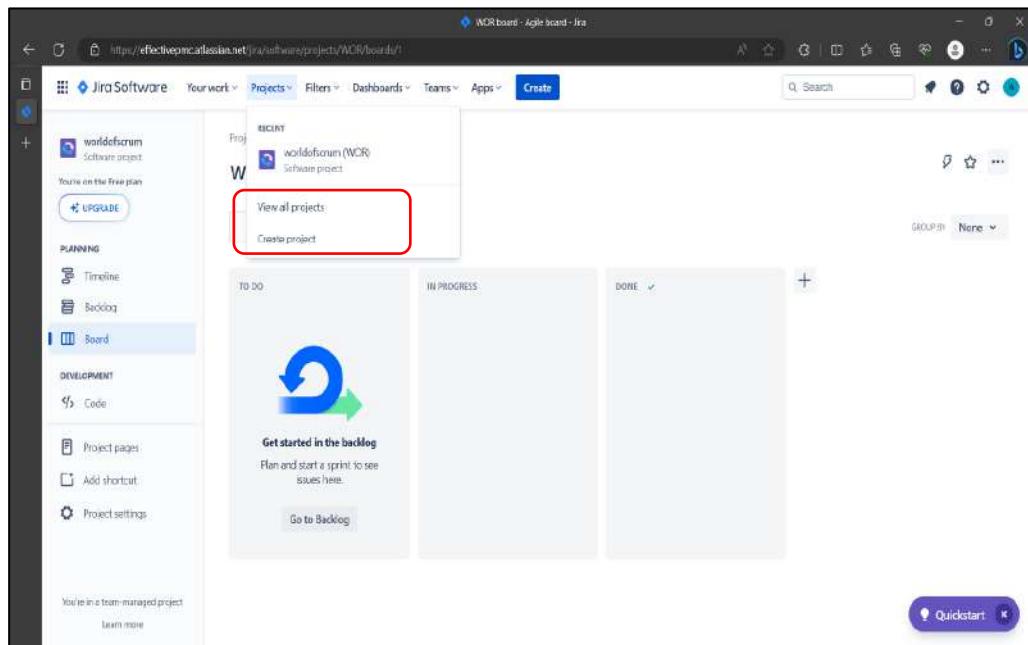
Scrum is an agile approach, commonly used by developers to deliver the value in the shortest time. It makes it possible to work upon projects iteratively. Each iteration is called Sprint.

## How to Use Jira for Scrum?

In Scrum, the team builds the product in a series of iterative sprints. To get started, you'll want to create a Jira Scrum project. Jira makes it easy to track and schedule tasks and to monitor progress. To get started, you'll need to create a Jira Scrum project at first.

### Create a Jira Scrum Project

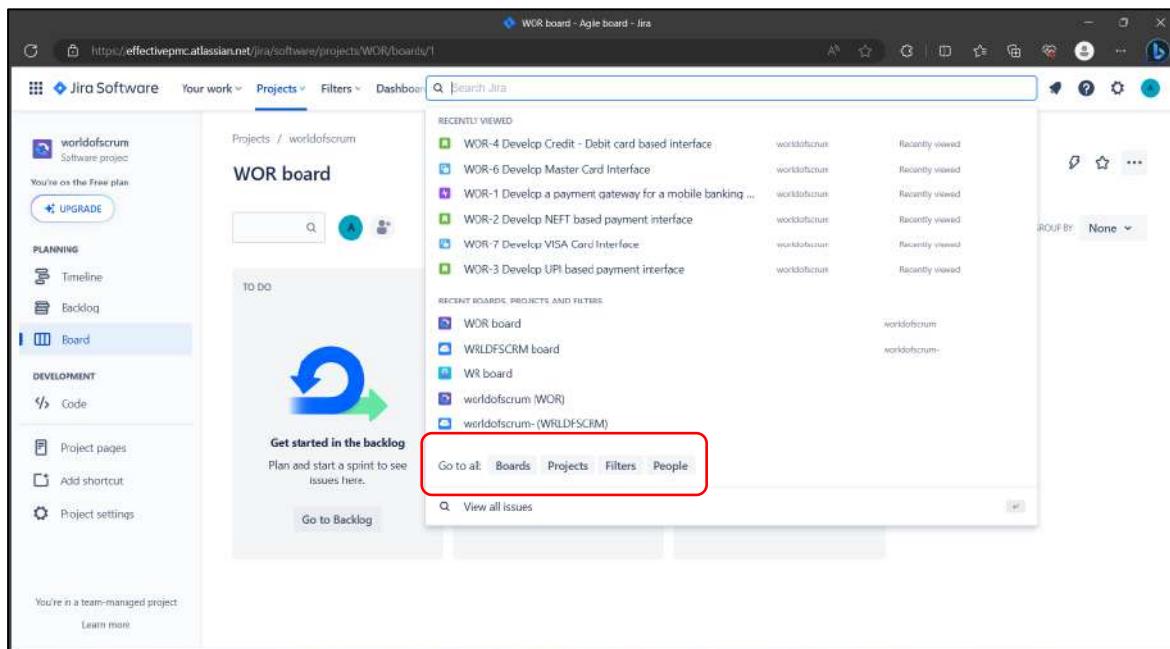
1. Navigate to Projects > Create project.



2. Choose Project template (whatever suits you best).
3. Choose a project type - Team-managed or Company-managed
4. Add project details - Enter a name for the project.
5. Click the Create button.

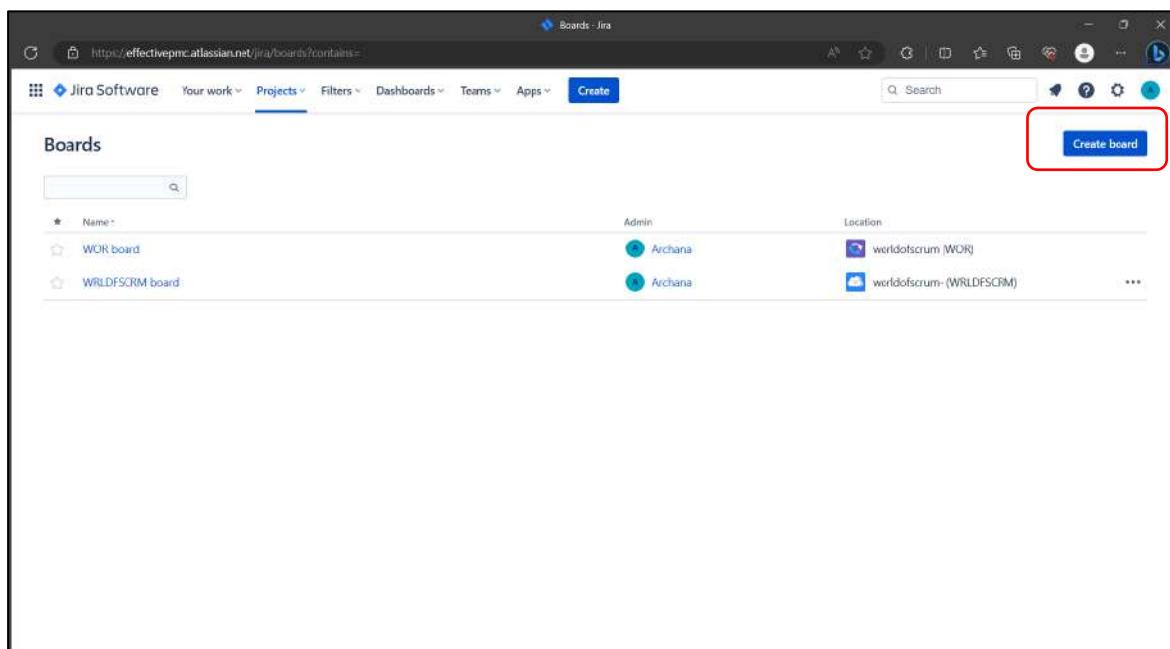
### Create a Jira Scrum Board

To create a board from scratch, select **Search > Goto all boards**.



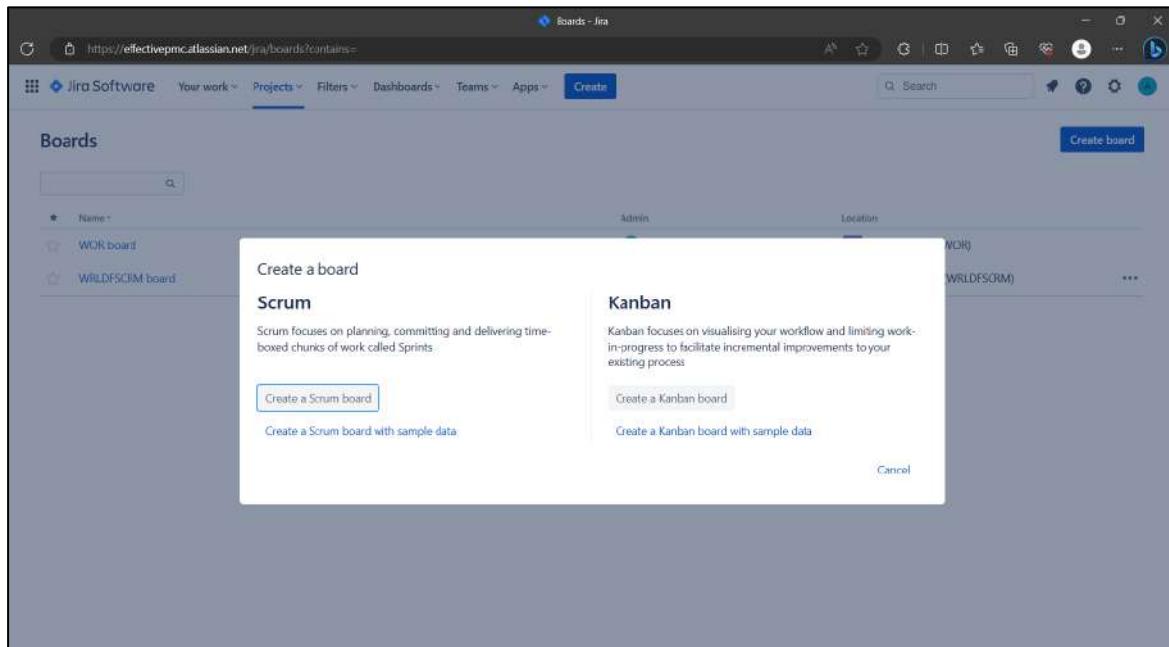
The screenshot shows the Jira Software interface for the 'WOR board'. On the left, there's a sidebar with project navigation (worldofscrum), planning tools (Timeline, Backlog, Board), development tools (Code, Project pages, Add shortcut, Project settings), and a note about being in a team-managed project. The main area displays the 'WOR board' with a 'TO DO' section containing a circular arrow icon and the text 'Get started in the backlog'. Below this, it says 'Plan and start a sprint to see issues here.' and has a 'Go to Backlog' button. To the right, there's a 'RECENTLY VIEWED' list of Jira issues and a 'RECENT BOARDS, PROJECTS AND FILTERS' list. At the bottom, there's a navigation bar with links for 'Go to all', 'Boards', 'Projects', 'Filters', and 'People', with 'Boards' being the active tab. A red box highlights this 'Boards' link.

Then click **Create board**.

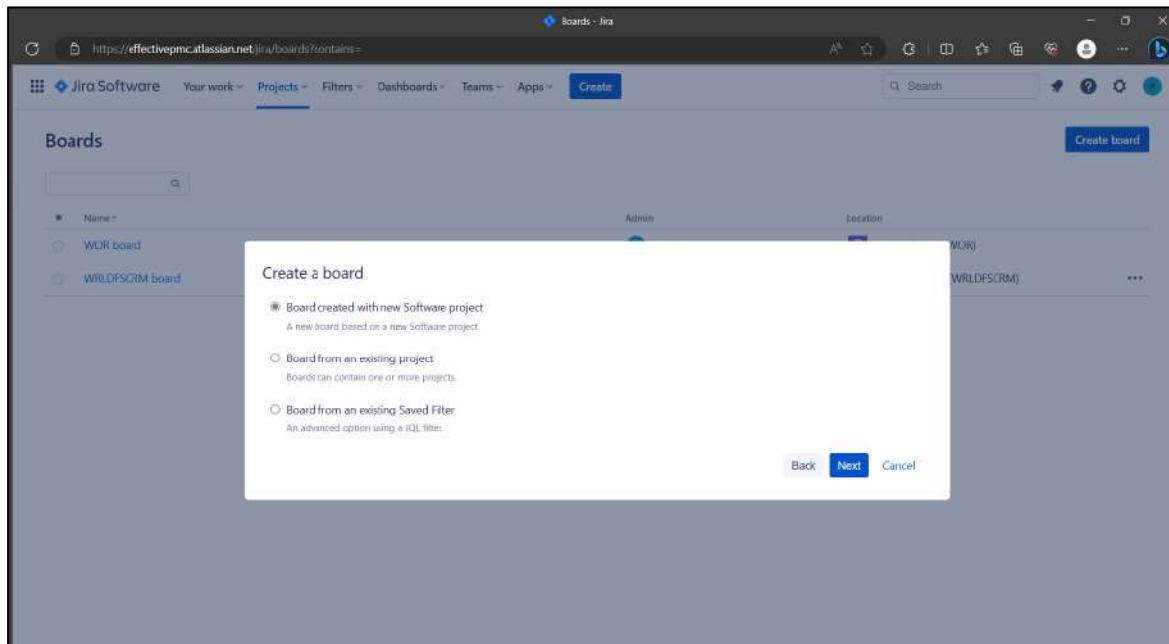


The screenshot shows the 'Boards' page in Jira Software. It lists existing boards: 'WOR board' and 'WRLDFSCRM board'. To the right of each board, there are columns for 'Admin' (Archana) and 'Location' (worldofscrum [WOR] and worldofscrum- (WRLDFSCRM)). At the top of the page, there's a navigation bar with tabs for 'Projects', 'Filters', 'Dashboards', 'Teams', and 'Apps', with 'Create' being the active tab. A red box highlights the 'Create board' button in the top right corner.

Select **Scrum** among the proposed board types.



The screenshot shows the Jira Boards creation dialog. It displays two main options: "Scrum" and "Kanban". The "Scrum" section includes a brief description: "Scrum focuses on planning, committing and delivering time-boxed chunks of work called Sprints.", a "Create a Scrum board" button, and a "Create a Scrum board with sample data" link. The "Kanban" section includes a brief description: "Kanban focuses on visualising your workflow and limiting work-in-progress to facilitate incremental improvements to your existing process.", a "Create a Kanban board" button, and a "Create a Kanban board with sample data" link. The background shows the Jira interface with other boards like "WOR board" and "WRLDFSCRM board".



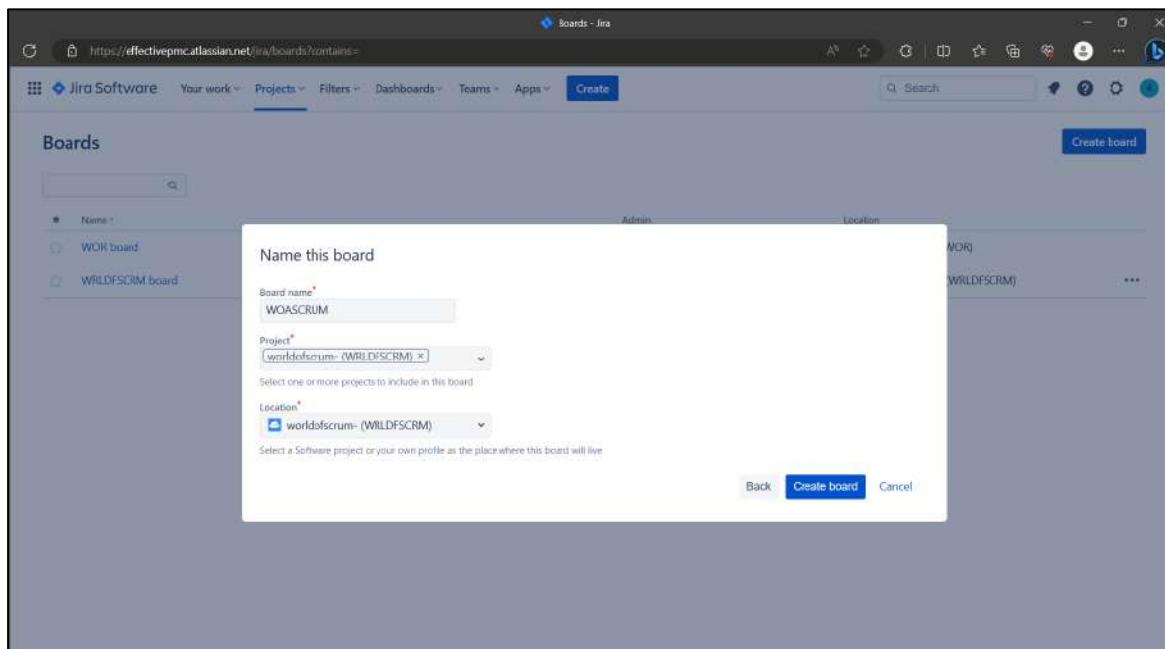
The screenshot shows the "Create a board" configuration dialog. It lists three options for creating a new board:

- Board created with new Software project: A new board based on a new Software project.
- Board from an existing project: Boards can contain one or more projects.
- Board from an existing Saved Filter: An advanced option using a JQL filter.

At the bottom of the dialog are "Back", "Next", and "Cancel" buttons.

Select “Board from an existing project” -> “Next”

On next screen “Name the board”, Select the project and location. Click “Create Board”



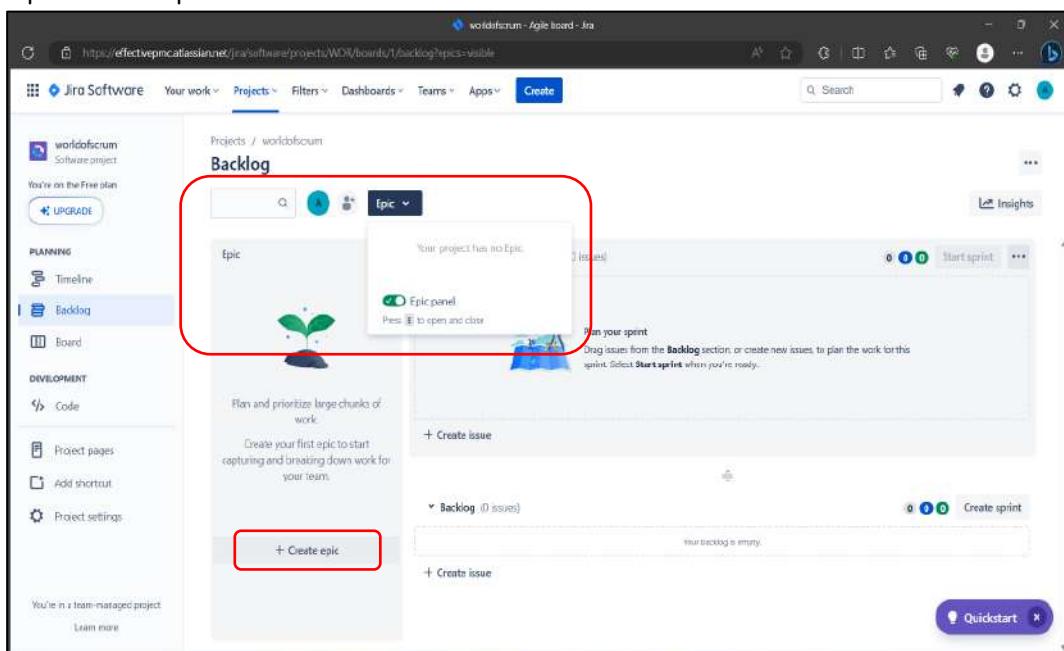
## Create EPICs, User Stories, Tasks, and Bugs in Jira Scrum Backlog for the project.

In Scrum, user stories define the requirements in user Language. They help developers to understand who needs a product? what benefits they need? Etc. JIRA defines User Stories, Tasks, and Bugs in form of “Issues” Let’s look at how to create issues or EPICS

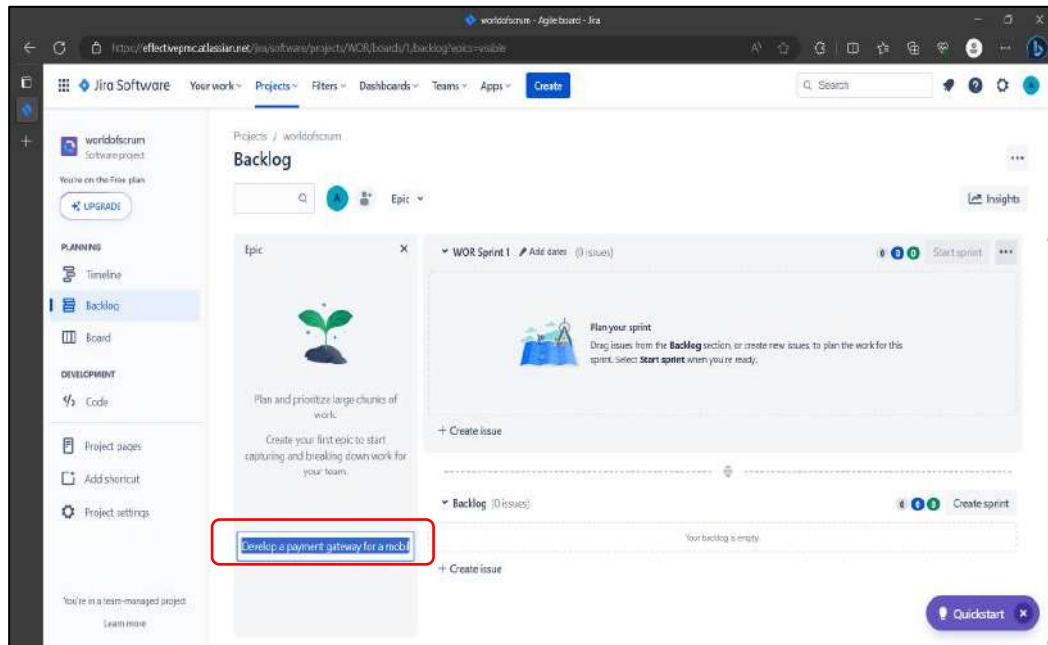
### Create an EPIC

High level user stories are called EPICs. They can be subdivided into stories and subtask.

#### 1. Open EPIC's panel

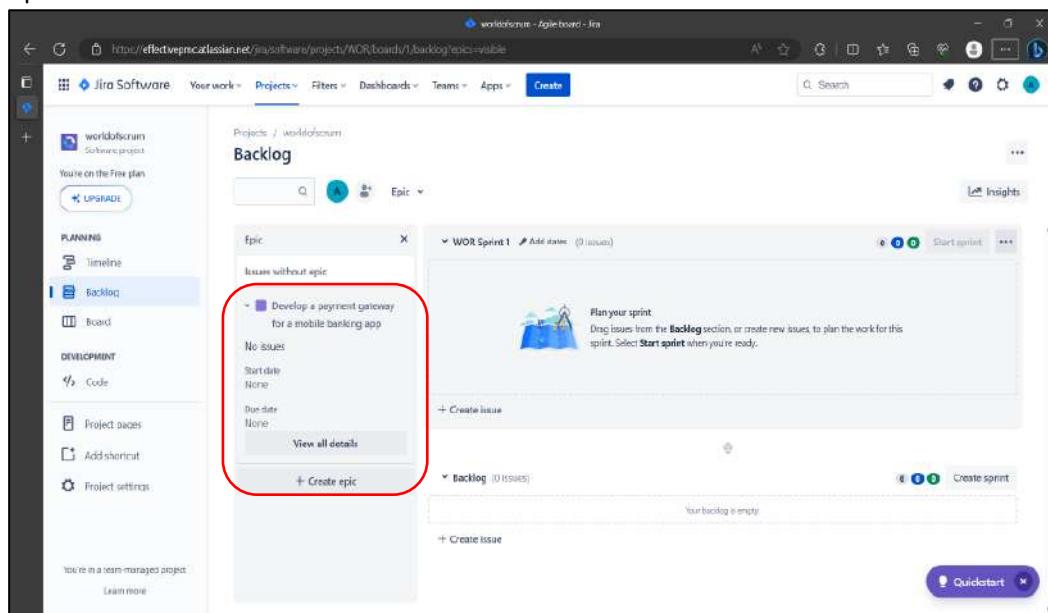


2. Click on Create epic and describe your epic details



The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar is open with 'Backlog' selected under 'PLANNING'. In the main area, there's a large 'Epic' card with a green sprout icon. Below it, a callout box contains the text 'Develop a payment gateway for a mobile banking app'. This text is highlighted with a red rectangular box. To the right of the epic card is a 'WOR Sprint 1' section with a 'Start sprint' button.

3. Epic will be created as seen in follow screen shot.



The screenshot shows the same Jira Software interface after the epic has been created. The 'Issues without epic' section now lists the previously described epic under 'Develop a payment gateway for a mobile banking app'. This list is also highlighted with a red rectangular box. The rest of the interface remains consistent with the first screenshot.

4. No add details of user stories as “Issues” under EPIC.

The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar shows 'Backlog' is selected. In the main area, an epic named 'WOR-1' is expanded, showing a child issue: 'Develop a payment gateway for a mobile banking app'. A red box highlights the 'Actions' dropdown menu for this issue. The modal window for this issue is open, showing the description and a 'Save' button.

## 5. Enter Stories details (Issues)

The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar shows 'Backlog' is selected. In the main area, an epic is selected, and its child issues are listed. A new child issue, 'DEVELOP A PAYMENT GATEWAY...', is being created in a modal. The 'Story' section of the modal is highlighted with a red box. The modal also shows fields for 'What needs to be done?' and 'Choose an existing issue', along with a 'Create' button.

## 6. If epics are not needed you can create the User story directly using “Create Issue” option

The screenshot shows the Jira Software interface for the 'worldofscrum' project. On the left, there's a sidebar with options like Planning, Backlog, Board, Development, and Project pages. The main area is titled 'Backlog' and shows two issues under 'WOR Sprint 1': 'WOR-2 Develop NEFT b...' and 'WOR-3 Develop UPI b...'. At the bottom left of the backlog list, there's a red box around the '+ Create issue' button.

This screenshot is similar to the one above, but the issue 'WOR-3 Develop UPI b...' has been selected, as indicated by a red box around its row. The details for this issue are visible in the modal window on the right.

### Create an issue

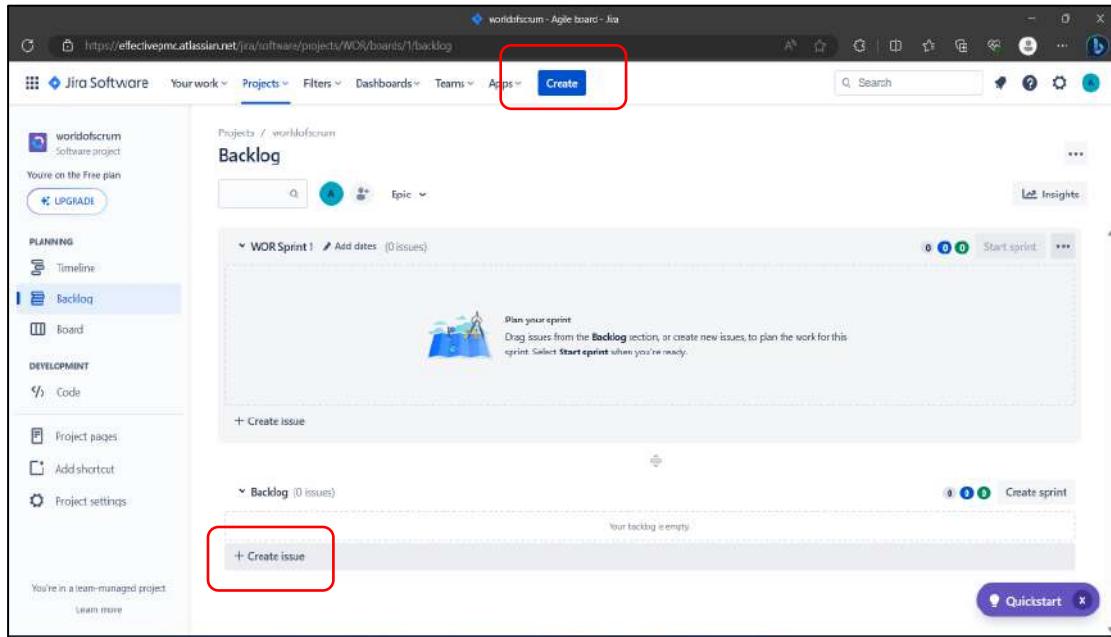
To create an issue in JIRA, the user should have Create Issue permission in the project. Admin can add/remove the permission.

There are a few different ways to create issues:

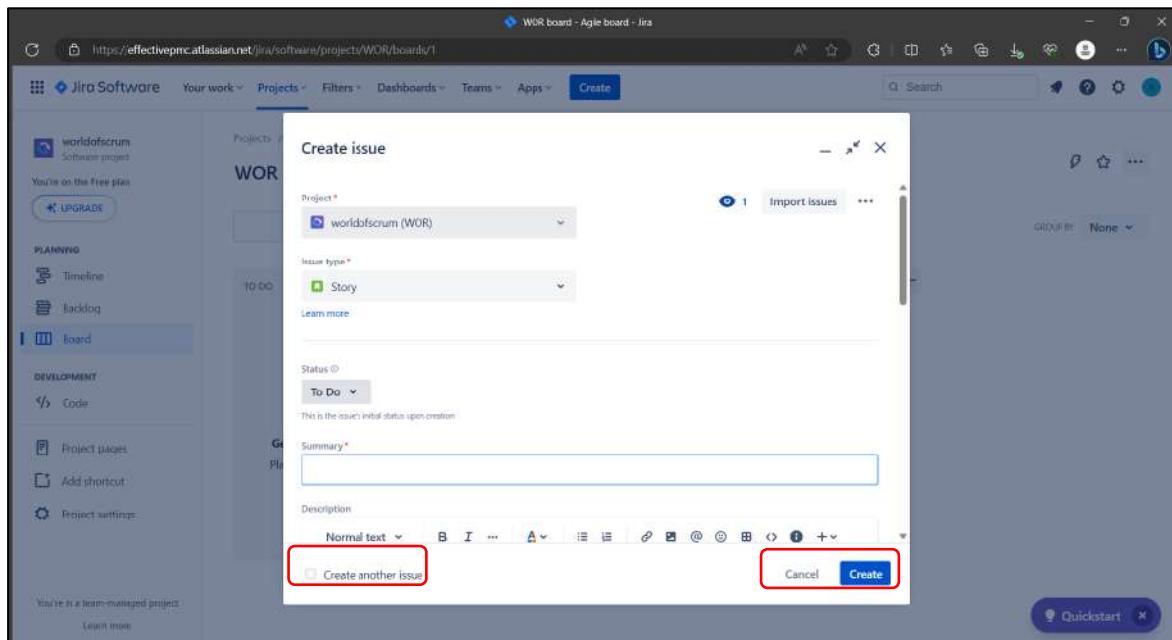
“Create” - From the top navigation bar, anywhere in Jira

Or

## “Create issue” – From On the backlog



The following screenshot shows how to create an issue by providing the required and optional details.



If the “Create another” checkbox is not checked, after clicking on the Create button, the user will have to navigate to the Dashboard and a pop-up will display on the right side with an **issue id** and **summary**.

## JIRA - Edit an Issue

To edit an issue in JIRA, the user has to navigate to the issue, which is required to edit and click on the issue to open the page. It will open the edit issue page that is similar to the create page.

### Create sub-tasks (Optional)

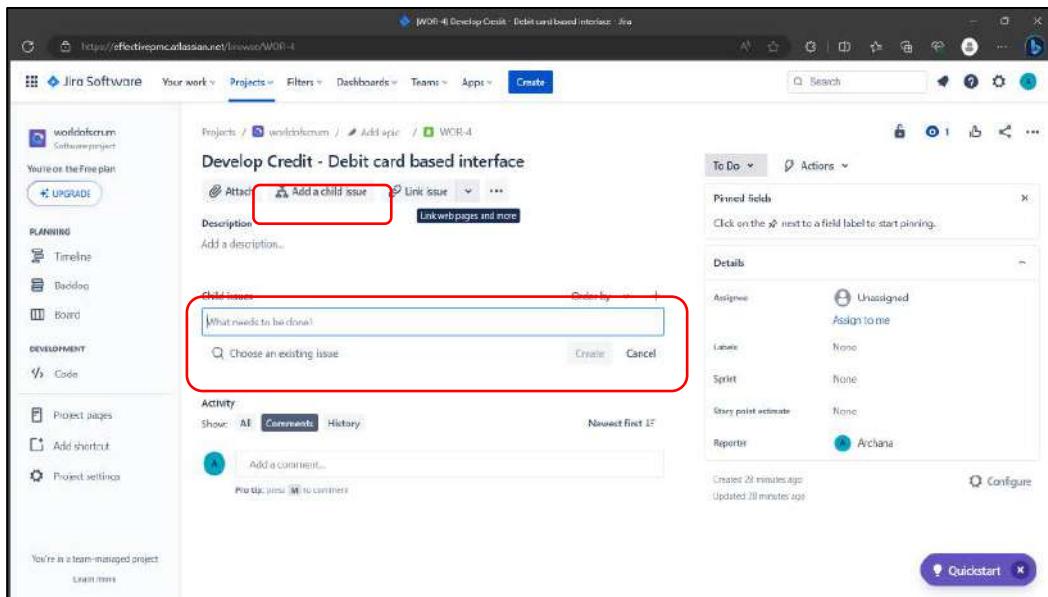
Issues can also have sub-tasks that are assigned and tracked individually. You might create sub-tasks for any of the following reasons:

- To split an issue into even smaller chunks
- To allow various aspects of an issue to be assigned to different people
- To create a to-do list for an issue

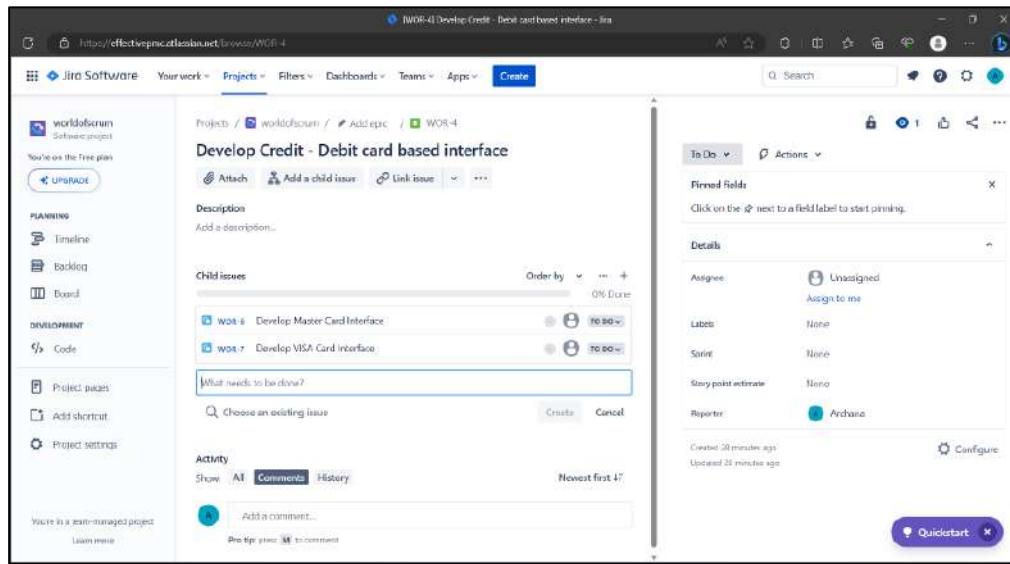
Please note that Subtasks cannot have a subtask of their own.

To create a sub-task:

1. Navigate to an issue, and select Add a child issue.

A screenshot of the JIRA software interface. The top navigation bar shows "Jira Software", "Your work", "Projects", "Filters", "Dashboards", "Teams", "Apps", and "Create". The main area shows a project titled "worldofscrum" under "Software project". A sub-issue titled "WCR-4 Develop Credit - Debit card based interface" is selected. On the right, there's a "Details" panel with fields like "Assigned" (Unassigned), "User" (None), "Split" (None), "Story point estimate" (None), and "Reporter" (Archana). In the center, a modal dialog box is open with the title "Develop Credit - Debit card based interface". It has a "Description" field containing "What needs to be done?" and a "Choose an existing issue" dropdown. At the bottom of the dialog are "Create" and "Cancel" buttons. The entire "Choose an existing issue" dropdown is highlighted with a red rectangle.

2. Fill in the details as needed. Click **Create** to create the subtask



### Convert Issue to Subtask & Subtask to Issue

In this Section, we will understand how to convert an issue to a subtask. For doing this, we should follow the procedure given below.

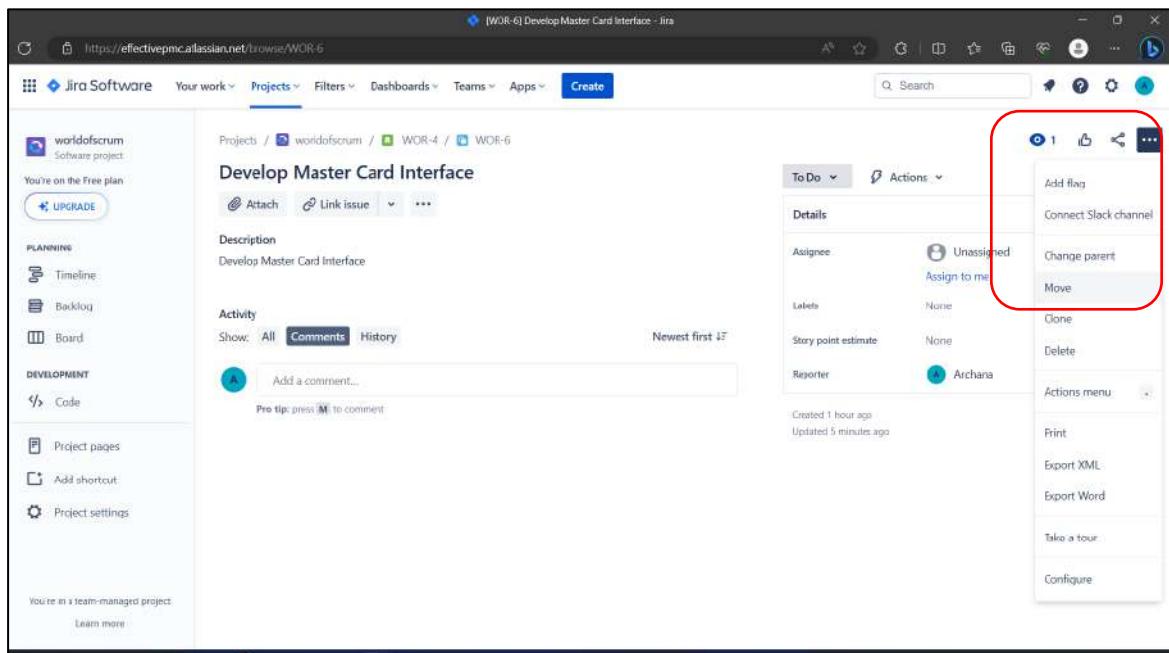
#### *JIRA - Convert an Issue to a Subtask*

We should consider the following points while converting an issue to a subtask.

- An issue cannot be converted into a subtask if it has its own subtask.
- To convert such an issue into a subtask, we should first convert all the subtasks of issues into a standard issue and after that convert the issue into a subtask.
- Subtasks cannot be moved from one issue to another directly.
- To move a subtask from one issue to another, first convert all sub-tasks into issues and then again, convert issues to subtasks by giving the parent issue name while converting.

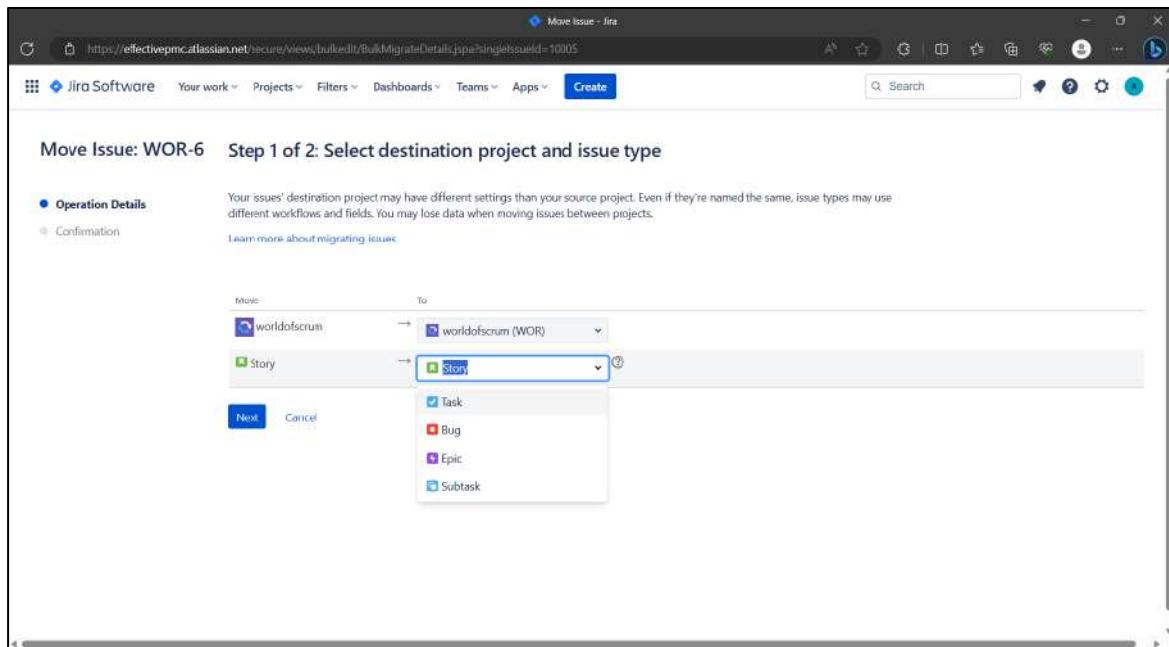
Let's learn how to convert a subtask to an issue.

To convert an issue to subtask, we should first navigate to the issue that needs to be converted into a subtask. Then, Select More → Move.



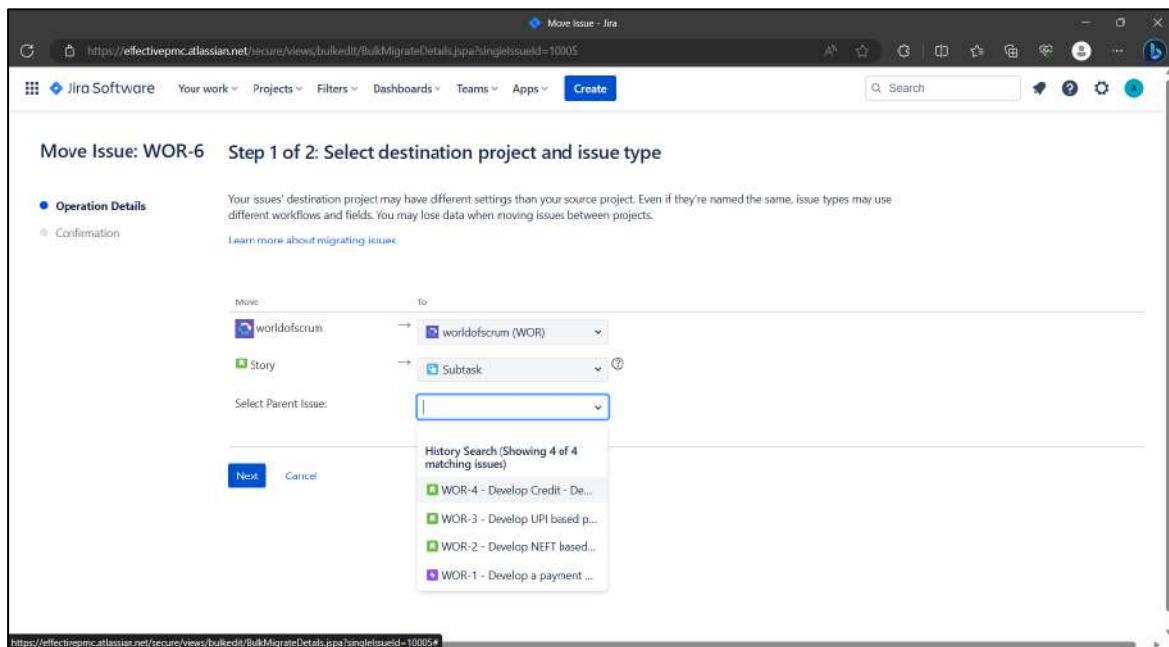
The screenshot shows a Jira Software interface for issue WOR-6. The left sidebar includes sections for Planning (Timeline, Backlog, Board), Development (Code, Project pages, Add shortcut, Project settings), and a note about being in a team-managed project. The main area displays the issue title "Develop Master Card Interface", a description, and activity logs. On the right, there's a "Details" panel with fields like Assignee (Unassigned), Labels (None), Story point estimate (None), Reporter (Archana), and creation history. A prominent red box highlights the "Actions" dropdown menu, which contains options such as Add flag, Connect Slack channel, Change parent, Move, Clone, Delete, Print, Export XML, Export Word, Take a tour, and Configure.

On Select destination project and issue type screen – Change the “Story” dropdown to “Subtask”.



The screenshot shows the "Move Issue" dialog in Jira. It's Step 1 of 2: Select destination project and issue type. The "Operation Details" tab is selected. The "Move" section shows "worldofscrum" as the source project and "worldofscrum (WOR)" as the destination project. Under "Story", a dropdown menu is open, showing "Story" and "Subtask". The "Subtask" option is highlighted with a blue border. Below the dropdown are buttons for "Next" and "Cancel".

“Select Parent Issue” - option will be displayed. Select appropriate parent for the issue and Click “Next”

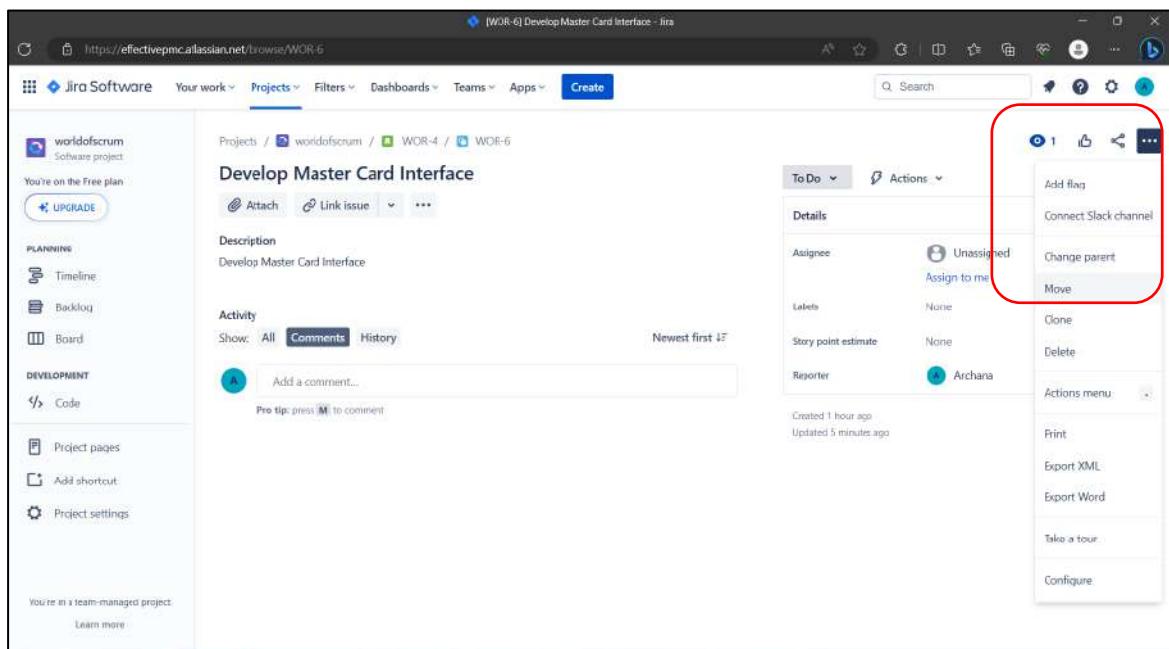


The screenshot shows the 'Move Issue' dialog in Jira. The title bar says 'Move Issue - Jira'. The main area is titled 'Move Issue: WOR-6 Step 1 of 2: Select destination project and issue type'. It has two tabs: 'Operation Details' (selected) and 'Confirmation'. Under 'Operation Details', it says 'Your issues' destination project may have different settings than your source project. Even if they're named the same, issue types may use different workflows and fields. You may lose data when moving issues between projects.' Below this is a link 'Learn more about migrating issues'. The 'Move' section shows 'worldofscrum' selected as the source project and 'worldofscrum (WOR)' selected as the destination project. Under 'Story', it shows 'Subtask' selected. A dropdown 'Select Parent Issue:' is open, showing a history search with four results: 'WOR-4 - Develop Credit - De...', 'WOR-3 - Develop UPI based p...', 'WOR-2 - Develop NEFT based...', and 'WOR-1 - Develop a payment ...'. At the bottom are 'Next' and 'Cancel' buttons.

Confirmation message “Update fields for 'SubTask' issues in the 'Your' project” will be shown. Click “Next” & “Confirm”

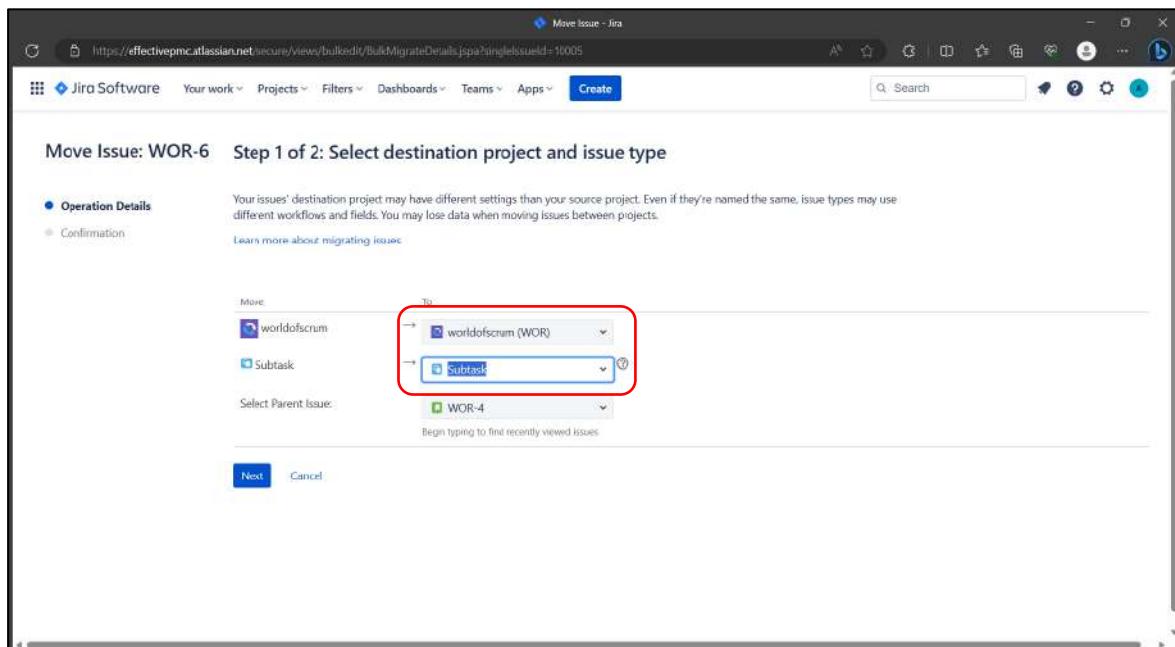
### JIRA - Convert a Subtask to an Issue

To convert a subtask to an issue, we should first navigate to the subtask that needs to be converted into an issue. Then, Select More → Move.

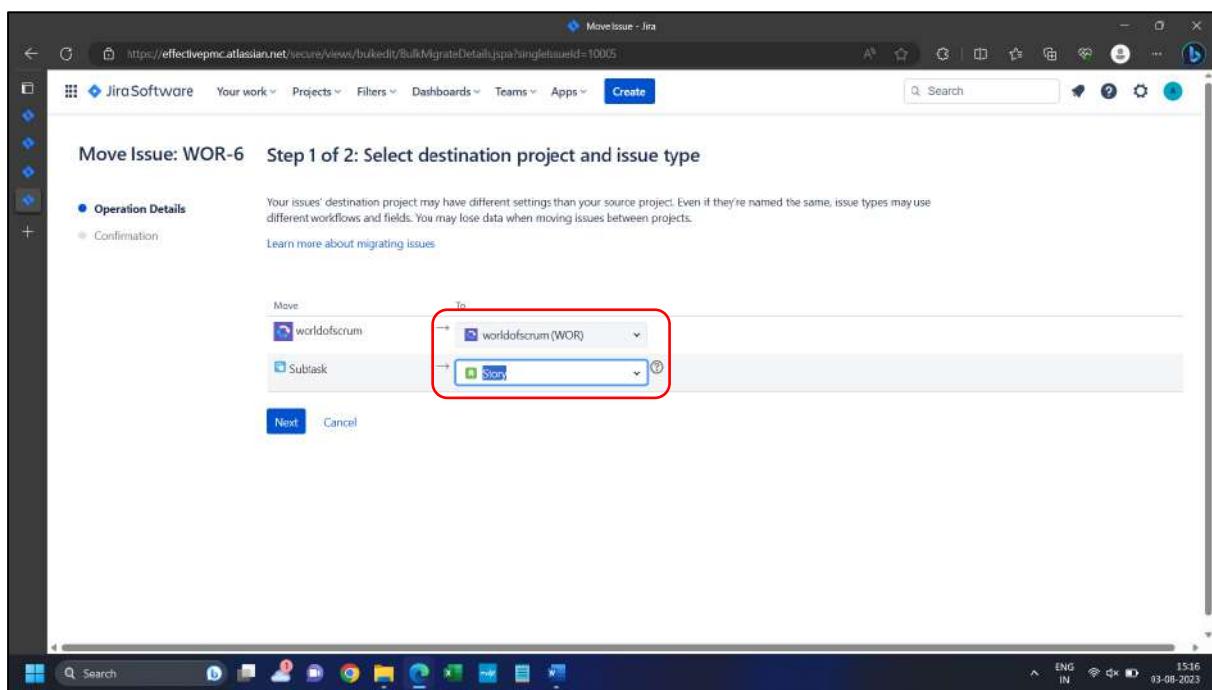


The screenshot shows the Jira issue details page for 'WOR-6'. The URL is https://effectivempc.atlassian.net/browse/WOR-6. The left sidebar shows project navigation. The main area displays the issue 'Develop Master Card Interface' with a description 'Develop Master Card Interface'. On the right, there is a 'More' menu with various options like 'Add flag', 'Connect Slack channel', 'Change parent', 'Move', 'Clone', 'Delete', etc. The 'Move' option is highlighted with a red box.

On Select destination project and issue type screen -



Change the dropdown for “Subtask” to “Story” and click “Next”



Confirmation message “Update fields for 'Story' issues in the 'Your' project” will be shown. Click “Next” & “Confirm”

## Using Sprints in Jira

To implement sprints in Jira set of steps need to followed. They are listed below.

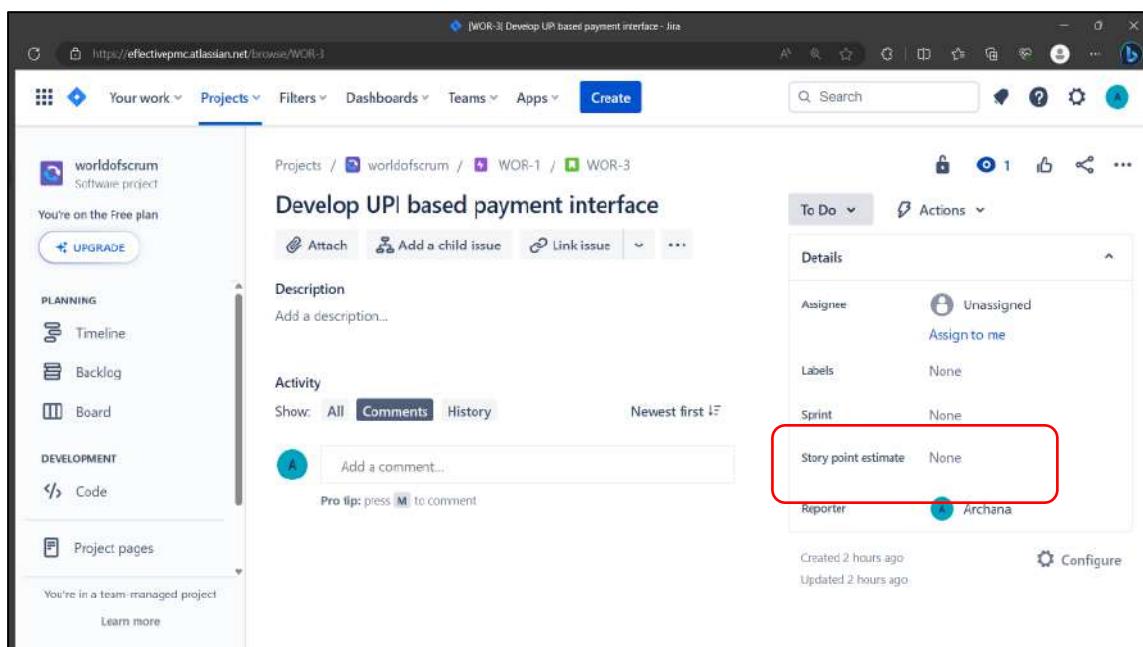
### Hold the sprint planning meeting

Sprint planning meeting allows the entire team to discuss the sprint goal and the stories from product backlog. The development team creates detailed tasks and estimates for the high-priority stories. The development team then commits to completing a certain number of stories in the sprint. These stories and the plan for completing them become what is known as the sprint backlog.

Click here to know the steps to [create Sprint Backlog](#).

### Add Story point estimate:

Once the stories for sprint are decided, team needs to add story point estimates to your stories by adding a number in the **Story point estimate** field.



The screenshot shows a Jira issue page for a story titled "Develop UPI based payment interface". The "Details" section on the right includes fields for "Assignee" (Unassigned), "Labels" (None), "Sprint" (None), and "Story point estimate" (None). A red box highlights the "Story point estimate" field. The left sidebar shows project navigation options like "Your work", "Projects", "Filters", "Dashboards", "Teams", "Apps", and "Create". The bottom of the screen shows standard browser controls and a status bar indicating the page was loaded 2 hours ago.

### create subtasks

If your stories are big you can think about breaking it down in Sub-tasks.

Read how to [create a Sub-Task](#) in JIRA

### Create and Start the Sprint in Jira

In Scrum, teams work on different tasks in sprints. These are scheduled periods, usually is of 4 weeks long. Before working with a sprint, the team usually holds a

special ceremony called a planning meeting to identify a sprint goal and define the issues for current sprint. Below are listed the step to create and start SPRINT in JIRA

1. A Default 1<sup>st</sup> sprint is created in JIRA as you create the project and backlog.
2. If you need to create more sprints go to the **Backlog** of your Scrum project.
3. Click the **Create Sprint** button at the top of the backlog

The screenshot shows the Jira Software interface for the 'worldofscrum' project. The left sidebar is open with 'Backlog' selected. In the main area, there is a section titled 'Backlog' with a sub-section 'WOR Sprint 1'. At the top right of this section, there is a button labeled 'Create sprint' which is highlighted with a red box. Below this, there is a section for 'What needs to be done?' and another for 'Backlog (0 issues)' with a '+ Create issue' button.

This screenshot shows the same Jira Software interface as the previous one, but now it displays two sprints: 'WOR Sprint 1' and 'WOR Sprint 2'. Both sprints have a 'Create sprint' button at their top right, which is highlighted with a red box. The backlog section below contains three items: 'WOR-2: Develop NEFT based payment interface', 'WOR-3: Develop UPI based payment interface', and 'WOR-4: Develop Credit/Debit card based interface'. Each item has a status indicator 'DEVELOP A PAYMENT GATEWAY F...' followed by 'TO DO' and a person icon.

- Click on pencil icon to edit the sprint details.

- Name the sprint.
- Add a duration of the sprint and start and end dates.
- Add the sprint goal as agreed to in the sprint planning meeting.
- Now fill your sprint with stories from the backlog

*To add stories to your sprints*

1. Navigate to the Backlog.
2. Drag and drop issues from the Backlog onto your sprint.

The screenshot shows the JIRA Backlog page for the project "worldofscrum". The left sidebar has sections for Planning (Timeline, Backlog, Board), Development (Code, Project pages), and a note about being on the Free plan. The main area shows the "Backlog" section with a header for "WOR Sprint 1 3 Aug – 31 Aug (1 issue)". A single story, "WOR-2 Develop NEFT based payment interface", is listed under "TO DO". A red box highlights this story. Below it is another backlog item, "WOR-3 Develop UPI based payment interface". At the bottom of the backlog section is a "+ Create issue" button.

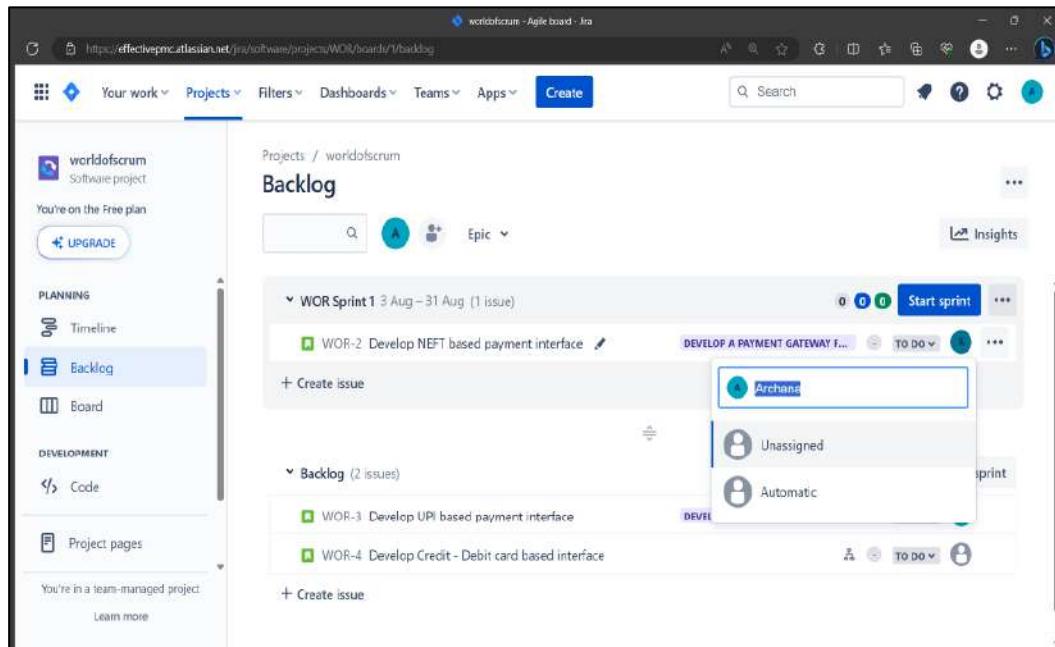
To assign stories in JIRA

1. Navigate to the story you want to assign.
2. Open the details pane.
3. In “Assignee” select the team member name

The screenshot shows the JIRA Story Details page for issue "WOR-3 Develop UPI based payment interface". The left sidebar includes sections for Planning (Timeline, Backlog, Board) and Development (Code, Project pages). The main area displays the story title and a "Details" panel. Within the "Details" panel, there is a "To Do" tab and an "Actions" tab. Under the "Actions" tab, the "Assignee" field is set to "Unassigned". A red box highlights the dropdown menu where "Archana (Assign to ...)" is selected. Other options in the menu include "Automatic" and "None".

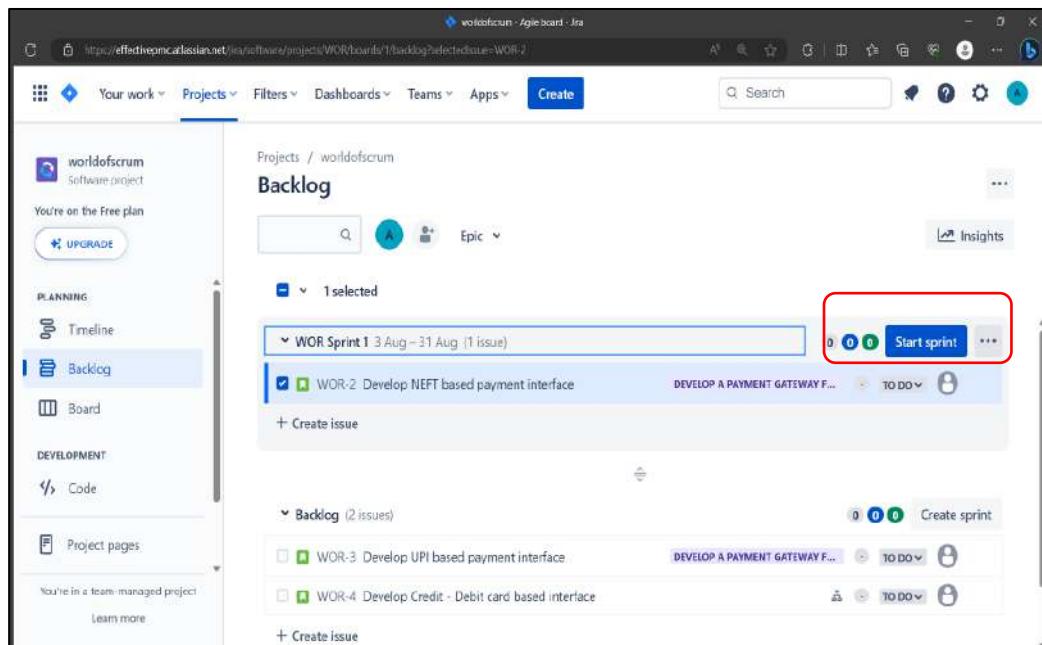
Or

Click on the assignee from backlog stories and select the team member.

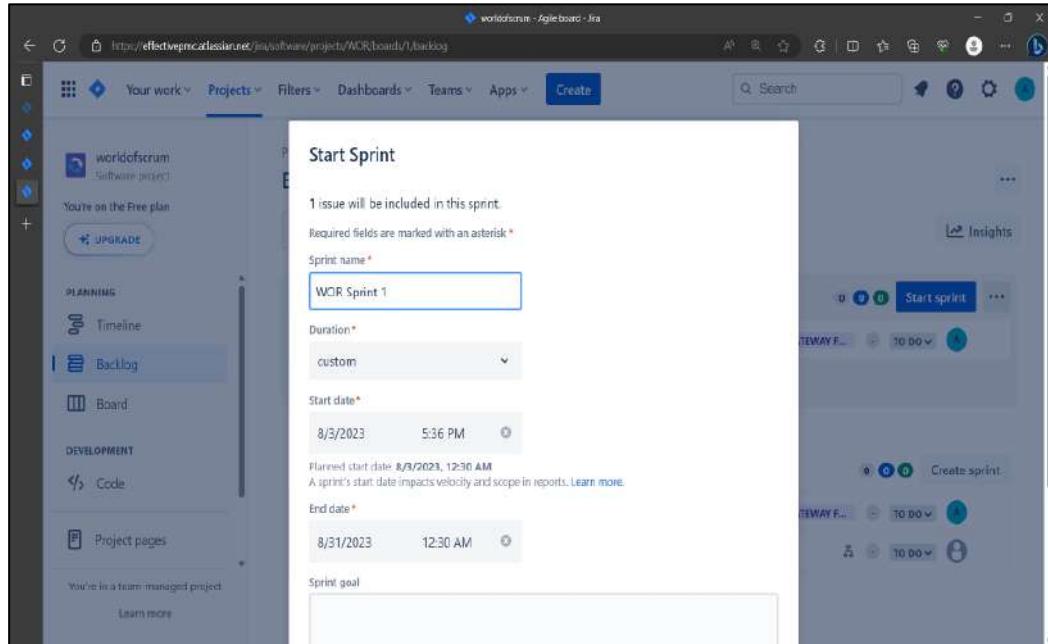


### To start a sprint

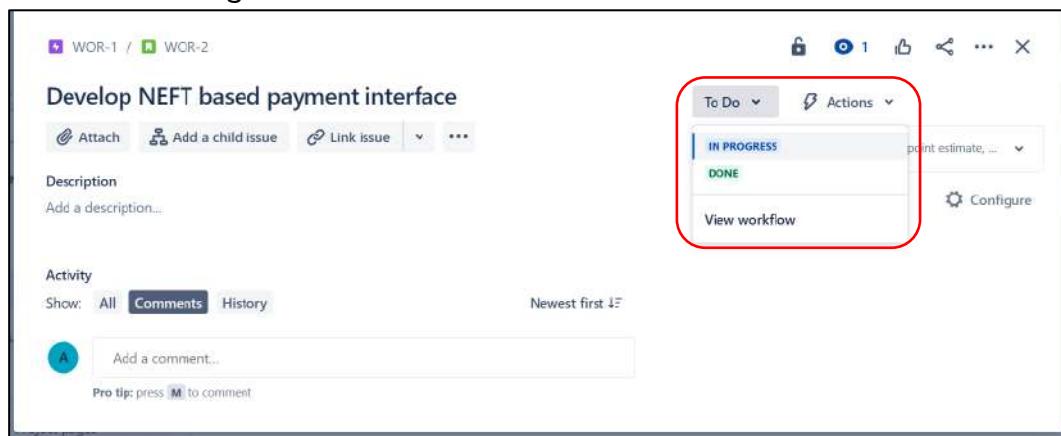
1. Go to the **Backlog** of your Scrum project.
2. Find the sprint that you want to start and click **Start Sprint**.

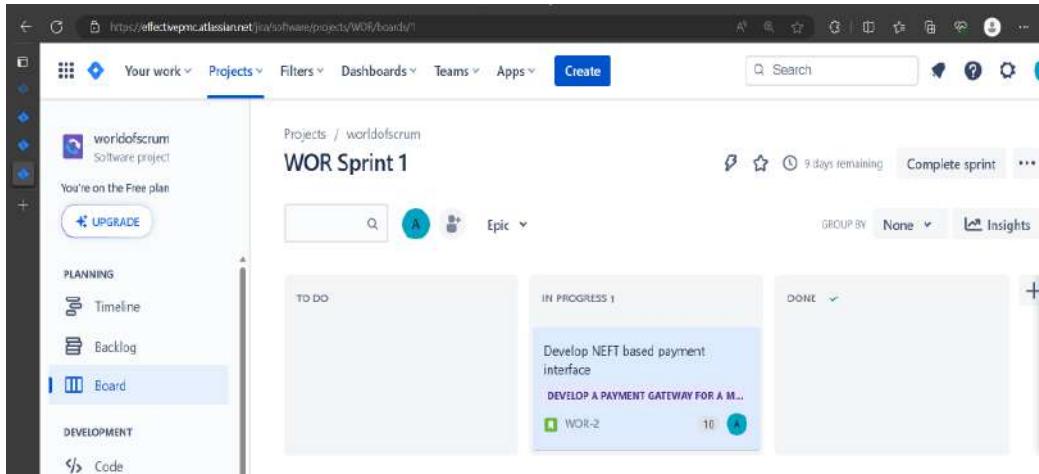


3. In **Start Sprint** dialog box Enter Duration / Start / End Date / SPRINT Goal.



4. Click “Start”
5. Your Project Board will display the SPRINT Workflow ( TO-DO, In-Progress, Done)
4. Team will pick up the work – User Stories. (Moving them from To-Do to In-Progress status. Then eventually, done!)
5. To Change the Story Status, Just drag and Drop on Work Flow or Open the issue and Change the status.





## 6. Hold the daily standup meetings

[View Sprint Report & Burndown Chart in Jira](#)

Use **Sprint Report** to watch how your team advances throughout the assignments. To access it, go to the appropriate project, click **Reports > Sprint Report** and choose the suitable sprint from the drop-down menu. There is also a **Burndown Chart** in the **Sprint Report**. It shows the actual and estimated amount of work to be done in a sprint. The horizontal x-axis in a Burndown Chart indicates time, while the vertical y-axis typically indicates story points.

[Hold the sprint review meeting](#)

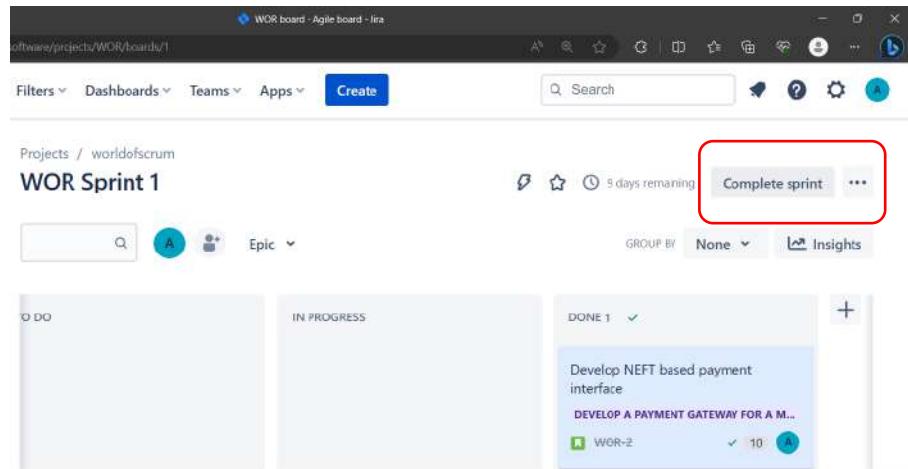
Sprint Review is a sharing meeting where the team shows what they've Created & delivered in that sprint. Each sprint usually produces a working part of the product called an increment.

[Hold the sprint retrospective meeting](#)

After you complete the sprint, have your team do a retrospective. Document your retrospective somewhere.

[Close the Sprint in Jira](#)

Go to the **Active** sprints in the Scrum board and choose the sprint to be closed in the drop-down menu. Then click **Complete Sprint**. Issues which were not completed from this sprint can be transferred to the backlog, other sprint, or a new sprint.



The screenshot shows a Jira Agile board titled "WOR Sprint 1". The board has three columns: "TODO", "IN PROGRESS", and "DONE". In the "DONE" column, there is one item: "Develop NEFT based payment interface" (issue key WOR-2). At the top right of the board, there is a button labeled "Complete sprint" with a red box drawn around it. Other buttons visible include "Create", "Search", and "Insights".



Repeat step From “Hold SPRINT Planning Meeting” to “Close SPRINT” for each Sprint.

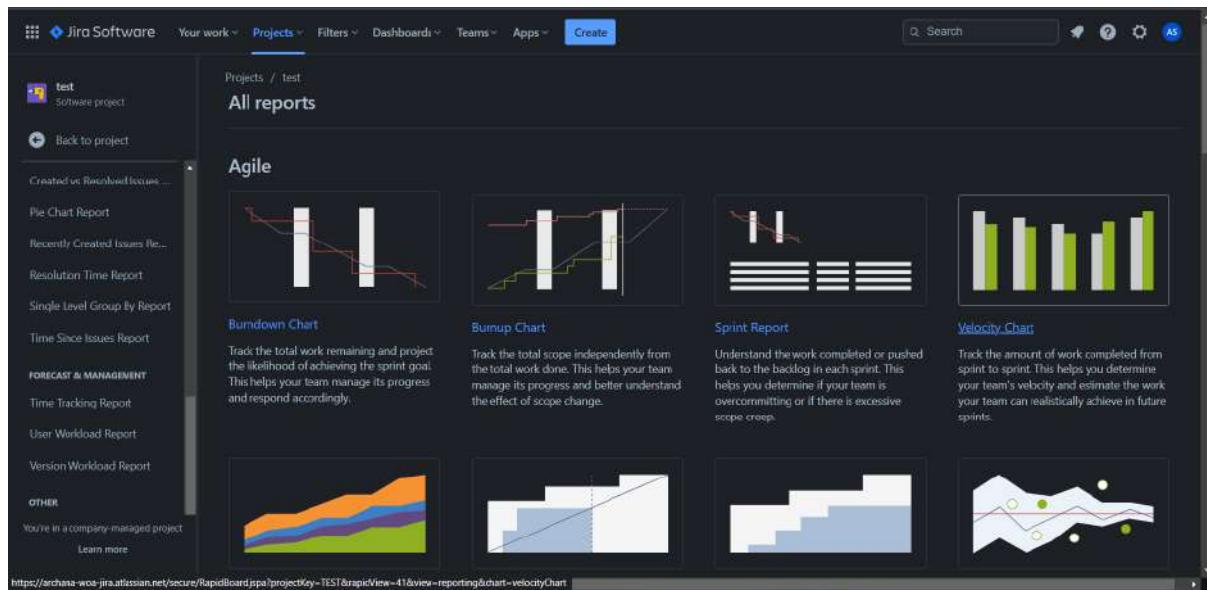
## How to Access Jira Reports

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

### How to Access Reports

To access reports in JIRA, the user should go to Project → choose Specific project. The following screenshot shows how to navigate to a specific project.

Click on the Reports icon on the left side of the page. It will display all the reports supported by JIRA. The following screenshot shows how to access the Report section.



The screenshot shows the Jira Software interface with the 'Projects' tab selected. On the left sidebar, under the 'test' project, there is a 'Reports' section containing several report types: Pie Chart Report, Recently Created Issues Report, Resolution Time Report, Single Level Group By Report, Time Since Issues Report, FORECAST & MANAGEMENT, Time Tracking Report, User Workload Report, Version Workload Report, and OTHER. The 'OTHER' section includes a link to 'Learn more'. The main content area displays the 'All reports' section for the 'Agile' category, which includes four charts: Burndown Chart, Bumpup Chart, Sprint Report, and Velocity Chart. Each chart has a brief description below it.

### Type of Reports

JIRA has categorized reports in four levels, which are –

- Agile
- Issue Analysis
- Forecast & Management
- Others

Let us now discuss the features of the above-mentioned report categories in detail.

## Agile

Following are the list of features of Agile Reports.

- **Burn down / Burn Up Chart** – Track the total work remaining, also whether sprint is achieving the project goal or not.
- **Sprint Report** – Track the work completed or pushed back to the backlog in each sprint.
- **Velocity Chart** – Track the amount of work completed from sprint to sprint.
- **Cumulative Flow Diagram** – Shows the statuses of issues over time. It helps to identify high-risk issues or unresolved important issues.
- **Version Report** – Track the projected release date for a version.
- **Epic Report** – Shows the progress towards completing an epic over a given time.
- **Control Chart** – Shows the cycle time for the product, its version or the sprint. It helps to identify whether data from the current process can be used to determine future performance.
- **Epic Burn Down** – Track the projected number of sprints required to complete the epic.
- **Release Burn Down** – Track the projected release date for a version. It helps to monitor whether the version will release on time, so mandatory action can be taken if work is falling behind.

## Issue Analysis

Following are the list of features of Issue Analysis.

- **Average Age Report** – Displays the average age in days of unresolved issues.
- **Created Vs Resolved Issue Report** – Display the number of issues created vs the number of issues resolved in given period.
- **Pie chart Report** – Shows a pie chart of issues for a project grouped by a specified field.
- **Recently Created Issue Report** – Shows the number of issues created over a time-period for a project and how many of those were resolved.
- **Resolution Time Report** – Displays the average time taken to resolve issues.
- **Single Level Group by Report** – It helps to group the search results by a field and see the overall status of each group.
- **Time since Issues Report** – It helps to track how many issues were created, updated, resolved, etc., over a time-period.

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## Forecast & Management

Following are the list of features of Forecast and Management type of reports.

- **Time Tracking Report** – Shows the original and current time estimates for issues in the current project. It can help to determine whether work is on track for those issues.
- **User Workload Report** – Shows the time estimates for all unresolved issues assigned to a user across projects. It helps to understand how much a user is occupied, whether overburdened or has less work.
- **Version Workload Report** – Displays how much outstanding work is remaining per user and per issue. It helps to understand the remaining work of a version.

## Generate A Sample Report :

### Burndown Chart

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

#### Generate a Report

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

**Step 1** – Go to Project → choose a Specific project. Click on the Report icon on the left side of the menu. Go to Agile and click on Burndown chart. The following screenshot shows how to access a Burndown Chart.

