

JIRA SOFTWARE FUNDAMENTALS

For Project Management

DANISH NAWAZ

SECTION 1

Getting Started with Jira Software

You learn Jira Software basics such as common terms, key concepts, and core product features like issues, projects, and boards. You'll also get to know the Jira Software interface.

This section will cover:

- 1. What is Jira Software?**
- 2. Basic terms in Jira Software**
- 3. Start navigating in Jira Software**
- 4. Using agile boards in Jira Software**

1. What is Jira Software?

- By the end of this lesson, you'll be able to:
 - Explain what Jira Software is and how it helps teams
 - Understand the role differences between an admin and end-user

Jira Software is a tool to help your team manage work.

- Think of Jira Software like a to-do list for your entire team. It helps everyone on your team plan, track, and ship world-class products. It's the most popular Jira product.
- Jira is for all types of teams. Agile teams, software development teams, marketing teams: whether you're on a team of five or 5,000, Jira Software helps keep the work all in one place.

NEXT... HOW JIRA LOOKS LIKE!

How does Jira Software help?

YOUR TEAM

Managing work in Jira helps your team be more **transparent, efficient, and collaborative**.

- ✓ **Transparency** means everyone on your team can see what work is getting done.
- ✓ **Efficiency** means your team can plan ahead by knowing exactly when work will start and end.
- ✓ **Collaboration** means working closely with your teammates, keeping discussions and comments well-organized.

How does Jira Software help?

YOU AS AN INDIVIDUAL

Along with being a better teammate, using Jira helps you **be better at your job.**

How so? As you start using Jira, you'll see how it helps you:

- ✓ **Prioritize** your most important work items
- ✓ **Improve your efficiency** of getting work done
- ✓ **Better plan your week** by visually seeing upcoming work
- ✓ **Find answers and ask questions** about your work items
- ✓ **Stay in the loop** on your team's work

There are two main roles in Jira Software: Users and Admins.

- **Jira Software user**

How they use Jira:

- ✓ **Update** their assigned work items
- ✓ **Share** progress with their team
- ✓ **View** their team's progress on work and provide feedback

- **Jira Software admin**

How they use Jira:

- ✓ **Configure** Jira layouts, features, or permissions for a team
- ✓ **Plan** resources based on bandwidth
- ✓ **Prioritize** issues across projects
- ✓ **Build** reports to track team performance

QUIZ

What does Jira Software do?

- A. Enables you to create and organize documents in a repository
- B. Helps your team plan, track, and ship work
- C. Stores code in a collaborative repository
- D. Acts as a help desk for customers to submit tickets through a portal

.

QUIZ ANSWER

What does Jira Software do?

- A. Enables you to create and organize documents in a repository
- B. Helps your team plan, track, and ship work**
- C. Stores code in a collaborative repository
- D. Acts as a help desk for customers to submit tickets through a portal

[Jira Software helps your team manage work. Think of it like a to-do list for your team.]

QUIZ

What are some of the responsibilities of users and admins in Jira Software?

- A. Users plan resources for a team; admins provide feedback on configurations
- B. Users build reports to track teams; admins share their individual progress
- C. Users prioritize issues across projects; admins track their individual work items
- D. Users update their assigned work items; admins configure Jira

QUIZ ANSWER

What are some of the responsibilities of users and admins in Jira Software?

- A. Users plan resources for a team; admins provide feedback on configurations
- B. Users build reports to track teams; admins share their individual progress
- C. Users prioritize issues across projects; admins track their individual work items
- D. Users update their assigned work items; admins configure Jira**

[In Jira Software, users update their assigned work items, share progress with their team and view their team's progress on work and provide feedback.

Admins configure Jira layouts, features, or permissions for a team, plan resources based on bandwidth, prioritize issues across projects, and build reports to track team performance.]

2. Basic terms in Jira Software

By the end of this lesson, you'll be able to:

- Define and identify issues, projects, and boards in Jira Software
- Understand the difference² between kanban and scrum boards

EXERCISE

- 1. Open Jira by going to: <https://www.atlassian.com/software/jira>**
 - 2. You can sign-in with Google**
 - 3. Look around the Jira Software page!!!**
-

What's an issue?

- As a user, your main role in Jira Software will be to update your work items every day.
- In Jira, individual work items are called issues. You'll update issues to show work progress or add relevant information.
 - ✓ Completed a work item? Update the issue in Jira.
 - ✓ Need to ask a question? Update the issue in Jira.
 - ✓ Have notes from a meeting? Update the issue in Jira.
- Issues can vary in size depending on how your team uses them. Some issues take months to complete. Other issues are finished in a few hours.
- **Let's see some example issues on our Jira Software!**

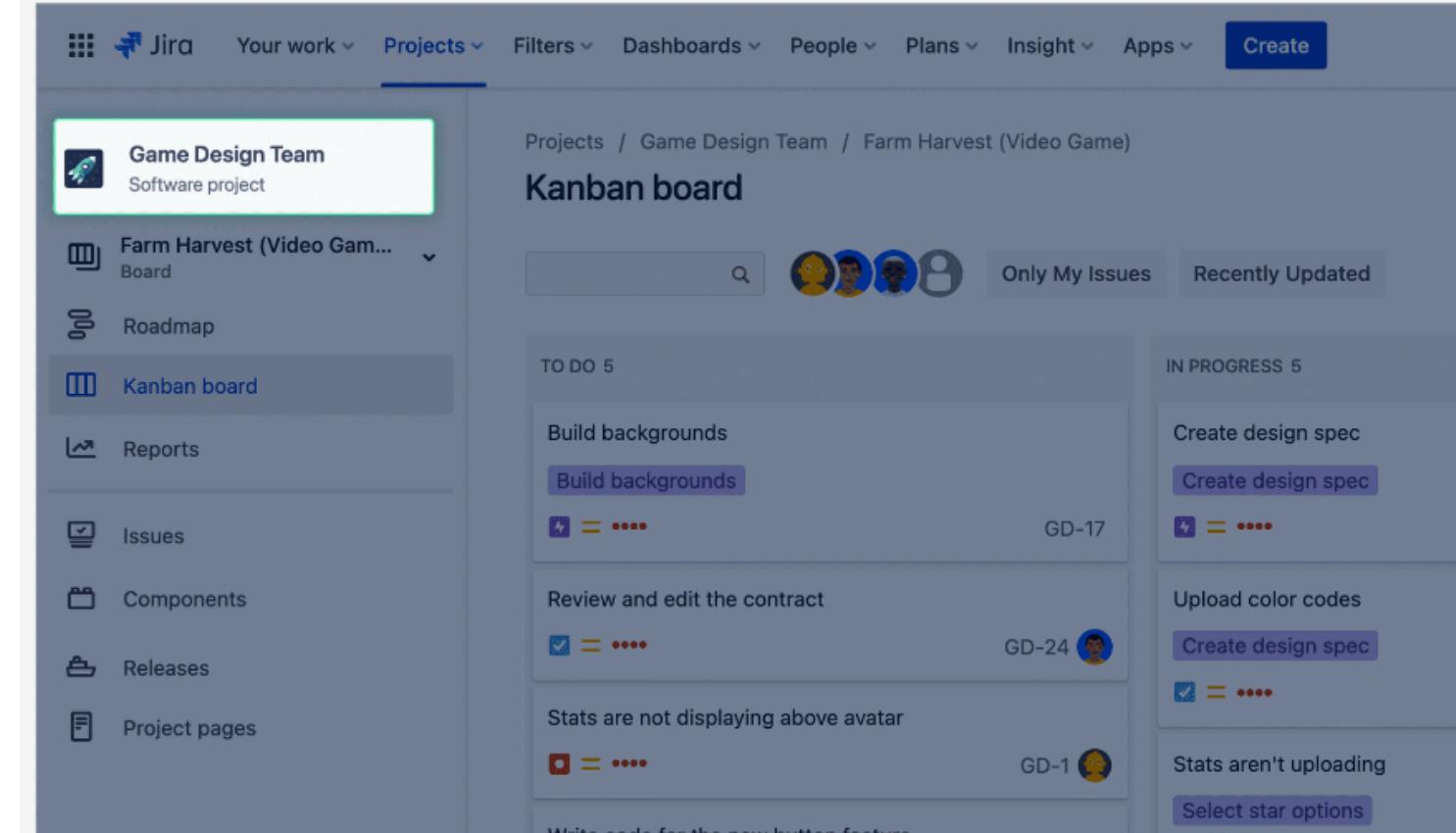
What's a Jira Software project?

- A project is a collection of issues.
- In Jira, every single issue is attached to a project. Projects organize issues in whichever way your team prefers.
- Your Jira projects will likely be set up for you, so no need to worry about creating new projects.
For now, you'll need to know how to identify your projects and what your projects are named.

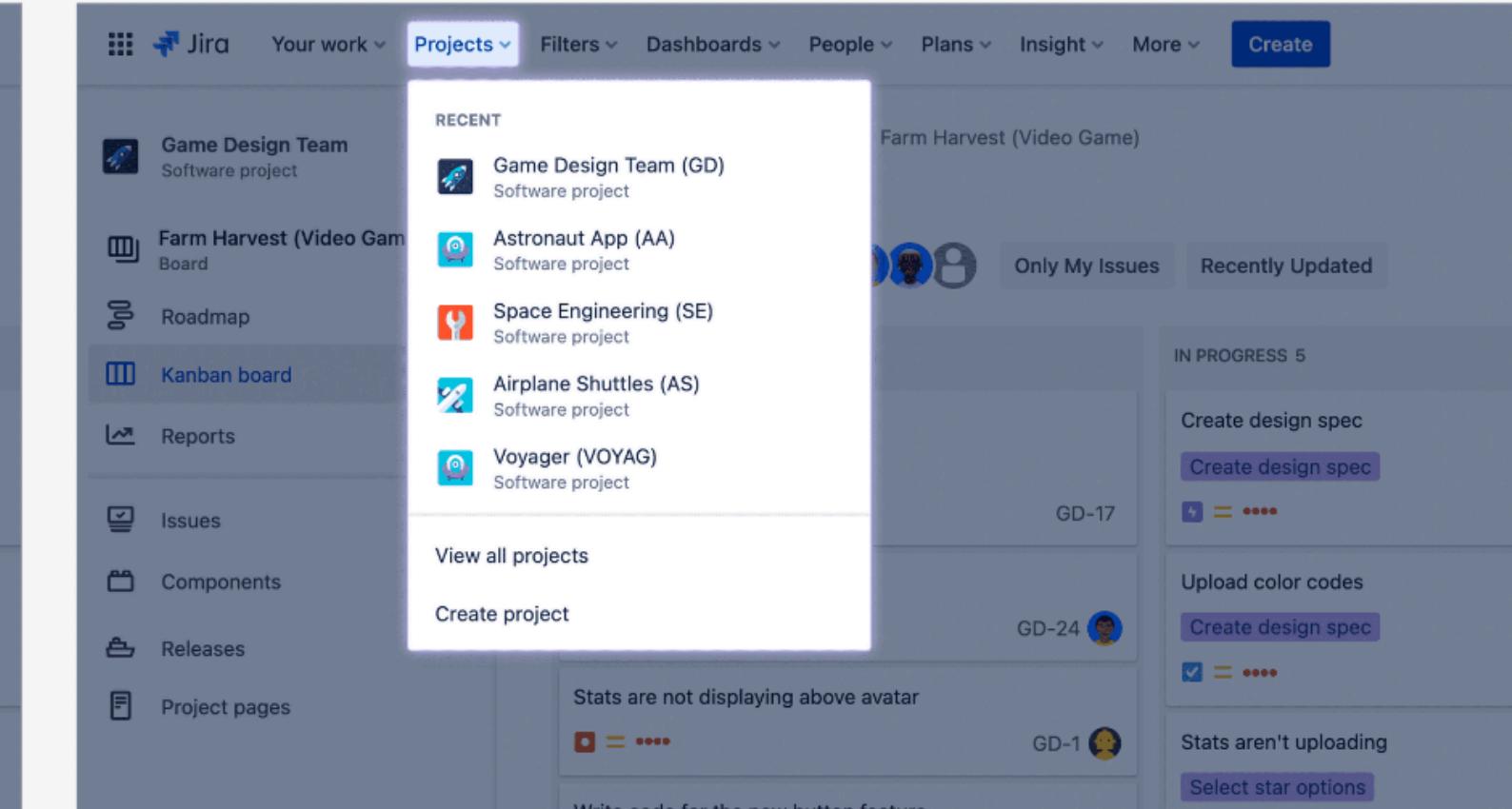
How do you identify your projects and see their names?

- There are two ways to quickly identify your projects. One is at the top left of your screen, under the Jira logo. This shows the name of the project you are currently viewing. But, you may be involved in more than one project.
- To see all of your projects, find the main navigation bar and click the Projects dropdown. This will show you a list of all the projects you have access to view.

This shows the name of the **current project**.



Use the **Projects Dropdown** to view all projects.



How are projects named?

- That depends on how your team has structured your work.
- Sometimes projects are named after an entire team, for example, "Game Design Team" or "Marketing Team" or "Legal Team."
- Other times, projects are named after a larger deliverable like an app version release, for example, "Vidzi App Release V2.7" or "Project Melon Web Launch."
- **LET'S LOOK AT OUR PROJECTS ON JIRA SOFTWARE!**

Why should you care about project names?

- Project names help you see how your team is structuring work. Is your project named after your team or after a deliverable?
- Knowing how your project is named will give you insight into how the work is being structured, and it will help you understand how best to use Jira for your own needs.
- Project keys are short versions of the project name that help identify the issues in that project. If the project key for your Game Design Team project is GDT, issues within that project will be GDT-1, GDT-2, and so on.

There are two types of projects in Jira Software.

Since your projects will already be set up for you, you won't need to worry too much about this. It's just good to know in case you see it on your screen.

- **TEAM-MANAGED PROJECTS**

- Team-managed projects are best for smaller, independent teams who want to control their own working processes and practices in a self-contained space.

- **COMPANY-MANAGED PROJECTS**

- Company-managed projects are designed for teams who want to standardize a way of working across many teams. These are usually for larger teams and are maintained by Jira admins.

EXERCISE

- 1. Select the project dropdown: In the main navigation bar, click the Project dropdown.**
- 2. Identify your projects: See the list of all projects available to you and notice their names.**
- 3. Click a project: Select any project to open it. (If none, then create a project)**

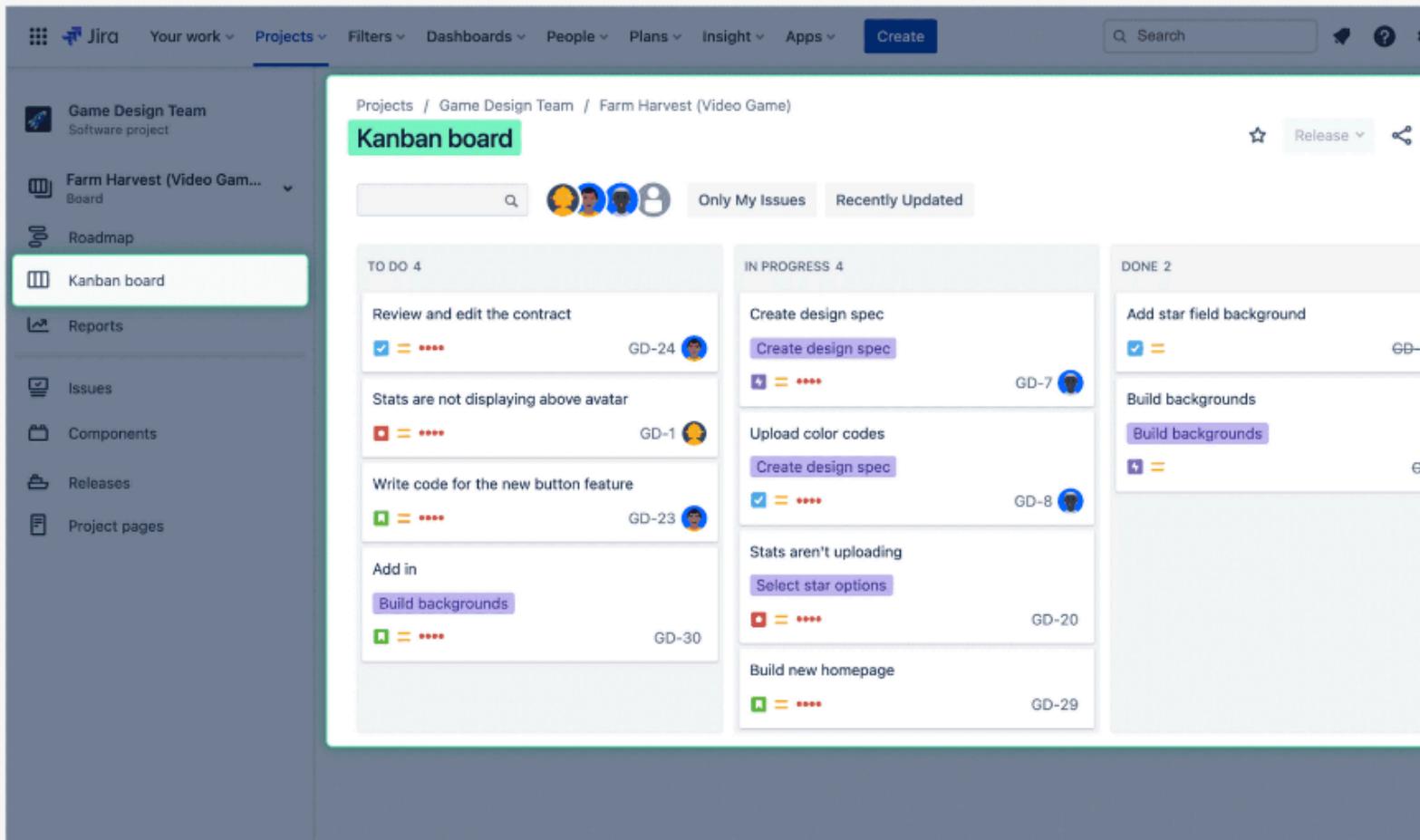
What's a Jira Software board?

- A board is a visual display of work progress.
- Boards are the most common way to see your work. They have three to four columns, for example, **To Do**, **In Progress**, **In Review**, and **Done**. You'll move issue cards across the board as work gets done.
- These columns are customized by each team, so yours may look different from the examples
- **LET'S LOOK AT OUR BOARD ON JIRA SOFTWARE!**

There are two types of boards in Jira Software.

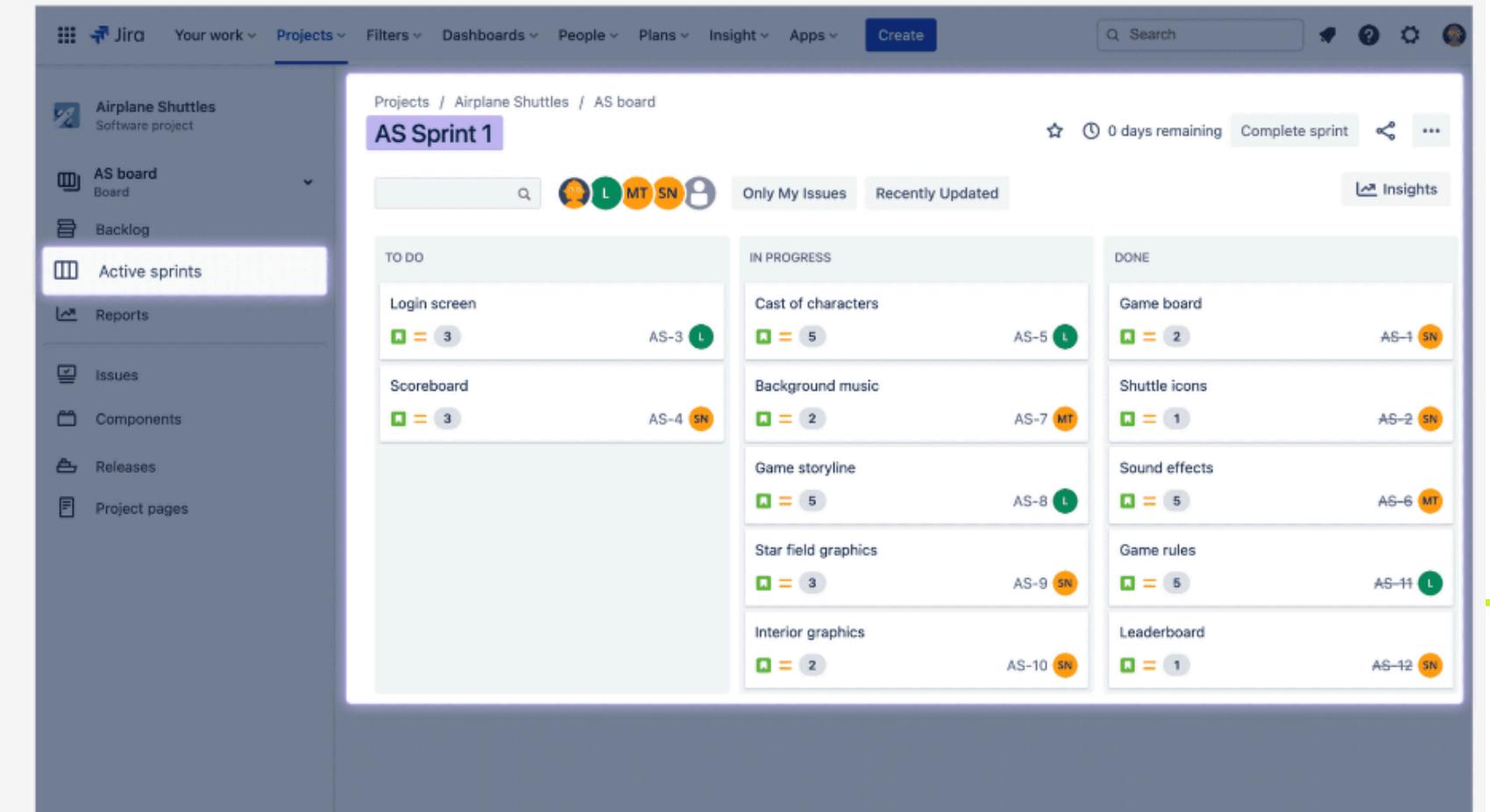
- **Kanban boards** are used by all types of teams. They illustrate a continuous flow of work. Issues continuously move in and out of the board from the start of the project until the end of the project.
- **Scrum boards** are mostly used by agile software development teams. Scrum boards bring in groups of issues that the team will attempt to complete during a fixed period of time, often a two-week "sprint." After a sprint is completed, a new sprint is created for the next batch of issues in the project.

This is a **Kanban Board**



A screenshot of a Jira Kanban board for the 'Game Design Team' project, specifically for the 'Farm Harvest' component. The board is divided into columns: TO DO, IN PROGRESS, and DONE. Issues are represented as cards with titles, descriptions, and status indicators. The 'TO DO' column has 4 items, 'IN PROGRESS' has 4 items, and 'DONE' has 2 items. The interface includes a sidebar with project navigation and a header with the Jira logo and search bar.

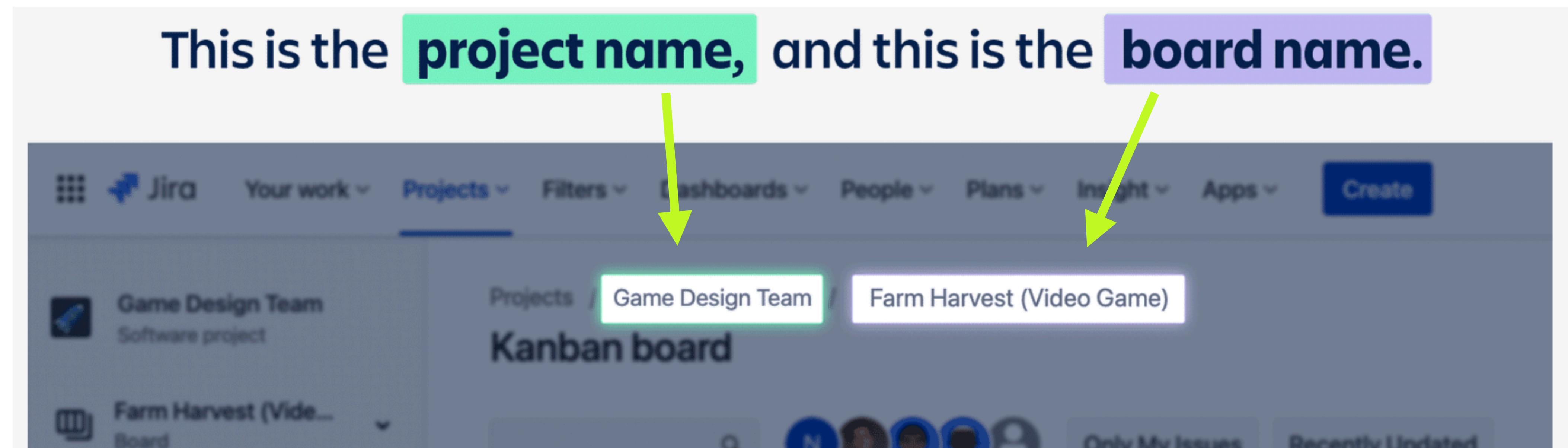
This is a **Scrum Board**



A screenshot of a Jira Scrum board for the 'Airplane Shuttles' project, specifically for 'AS Sprint 1'. The board is divided into columns: TO DO, IN PROGRESS, and DONE. Issues are grouped into 'Active sprints'. The 'TO DO' column has 12 items, 'IN PROGRESS' has 12 items, and 'DONE' has 12 items. The interface includes a sidebar with project navigation and a header with the Jira logo and search bar.

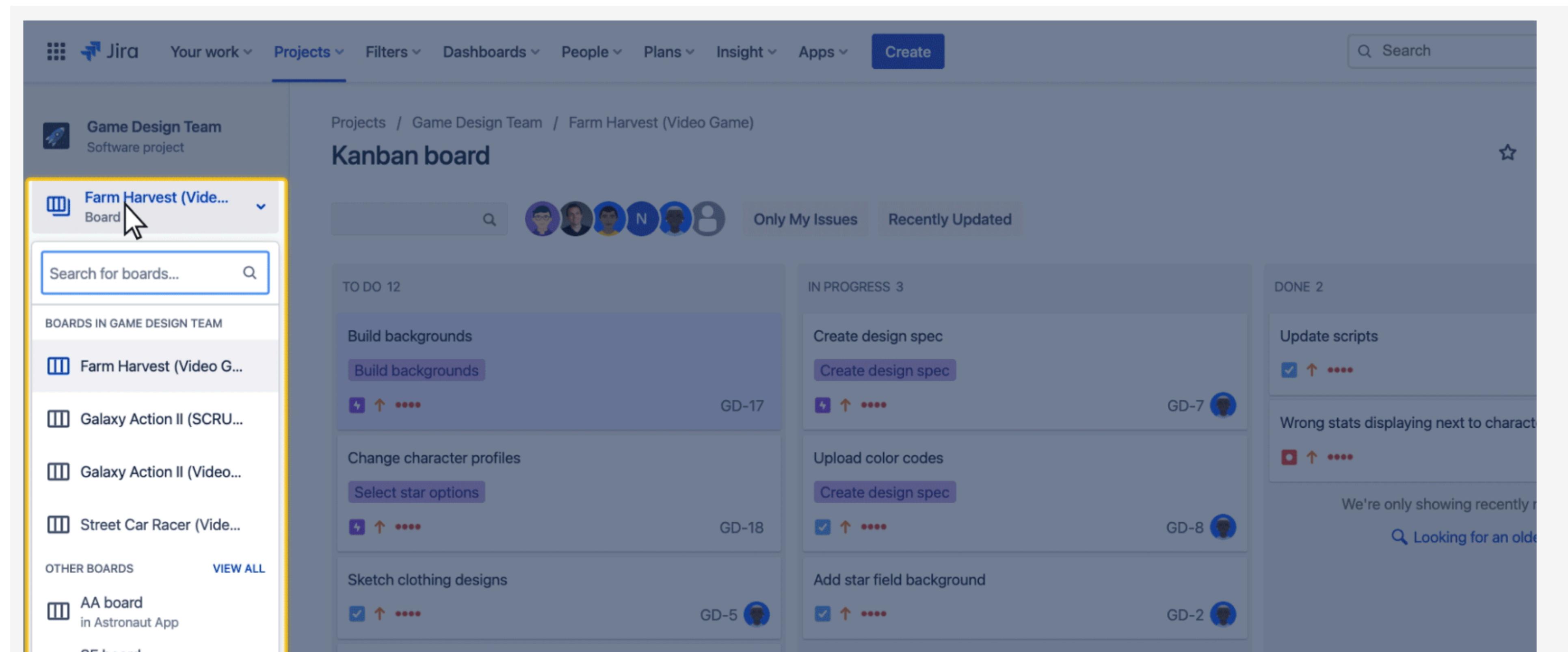
How are boards named?

- Just like projects, boards have specific names. Boards sit within projects. A single Jira project can have several boards. A board is often named after a larger deliverable or team of people.
- 🤝 In the example below, you can see the project name is "Game design team," the name of their team, and the board name is "Farm Harvest (Video Game)," a larger deliverable.



How do you see all of your boards?

- You probably have more than one board. Each Jira project often has multiple boards within it. To see all of your boards, navigate to the left project sidebar and select the board dropdown.



EXERCISE

- 1. Select the board dropdown: On the left project sidebar, click the board dropdown next to your current board name.**
- 2. See the list of boards: View all the boards currently available to you.**
- 3. Click on a board name: Select any board to open it.**

1. Project

2. Board

3. Issue

The image shows the Jira interface with three main sections highlighted by yellow boxes and numbered 1, 2, and 3.

- 1. Project:** The left sidebar shows the "Game Design Team" project selected. A yellow box highlights the "Kanban board" option in the sidebar.
- 2. Board:** The main area shows the "Kanban board" for the "Farm Harvest (Video Game)" project. A yellow box highlights the "Kanban board" title. The board has three columns: "TO DO" (5 items), "IN PROGRESS" (5 items), and "DONE" (2 items). A yellow box highlights the first item in the "TO DO" column: "Review and edit the contract".
- 3. Issue:** A yellow box highlights the "Review and edit the contract" issue in the "TO DO" column. The issue details are as follows:
 - Summary: Review and edit the contract
 - Assignee: GD-24 (Avatar)
 - Labels: = = = =
 - Due Date: GD-17

QUIZ

In Jira, an item like "Review and edit the contract" is an example of a(n) _____.

- A. issue
 - B. board
 - C. project
-

QUIZ ANSWER

In Jira, an item like "Review and edit the contract" is an example of a(n) _____.

- A. issue**
- B. board
- C. project

[This is an example of an issue, an individual work item in Jira.

A project is a collection of issues.

A board is a visual display of work progress.]

QUIZ

From the options below, which is the best way to see all of your projects?

- A. Double click into an issue and select the project
- B. Click on your profile and find the project settings
- C. Select the board dropdown on the left project sidebar
- D. Use the project dropdown on the main navigation bar

QUIZ ANSWER

From the options below, which is the best way to see all of your projects?

- A. Double click into an issue and select the project
- B. Click on your profile and find the project settings
- C. Select the board dropdown on the left project sidebar
- D. Use the project dropdown on the main navigation bar**

[The project dropdown is the best way to see all your projects.]

3. Start navigating in Jira Software

By the end of this lesson, you'll be able to:

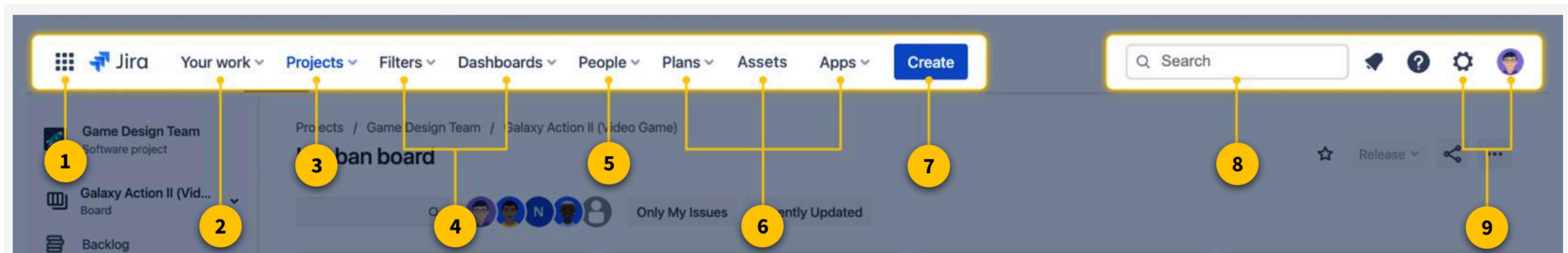
- Understand the main navigation and project sidebar
 - Switch between different projects and boards
-

What's the best way to get around in Jira?

- You'll use the main navigation bar and the project sidebar.
- At the top of your screen, the main navigation bar helps you find your work, projects, and teammates. It also allows you to create issues, search for work, and adjust your settings.
- On the left of your screen, the project sidebar is a collapsible navigation bar that shows you options specific to the project you're viewing.
- **LET'S GET AROUND ON JIRA SOFTWARE!**

Jira Main Navigation Bar

1. Product switcher: Allows you to switch to other Atlassian products your team may be using, like Confluence or Bitbucket.
2. Your work: Shows issues, projects, and boards you've recently visited and allows you to view all work assigned to you.
3. Projects: Shows a list of all of your projects and enables you to create new projects.
4. Filters and Dashboards: Shows saved or starred filters and dashboards.
5. People: Shows a list of the people and teams you interact with most.
6. Plans, Assets, and Apps: Allows you to see your plans and apps installed on your Jira instance (for Premium users only).
7. Create: Enables you to quickly create new issues.
8. Search: Helps you find issues, projects, boards, queues, filters, and people.
9. Settings and Profile: Enables you to customize your personal settings, set up your profile, and control email notifications.



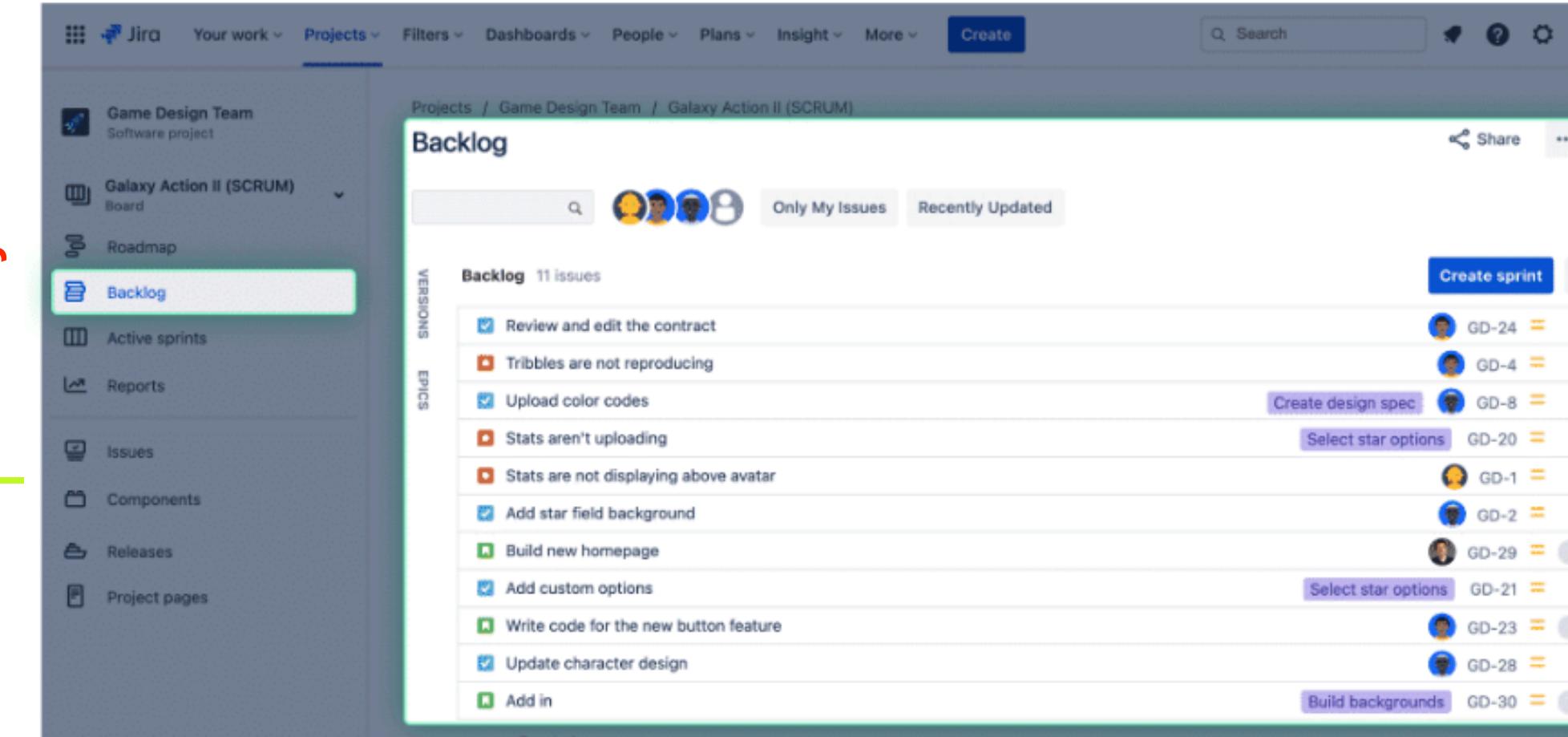
How can you see your work?

- In Jira Software, there are several ways to see your current and future work.
- To view your daily work, **boards** will probably be your go-to view. But, not every issue is worked on right away. The backlog and timeline are other important views that give you a different perspective on your work.
- The **backlog** shows issues that have yet to be started. The **timeline** shows all issues planned in a linear, chronological view.

Your team may not have the backlog or timeline enabled.

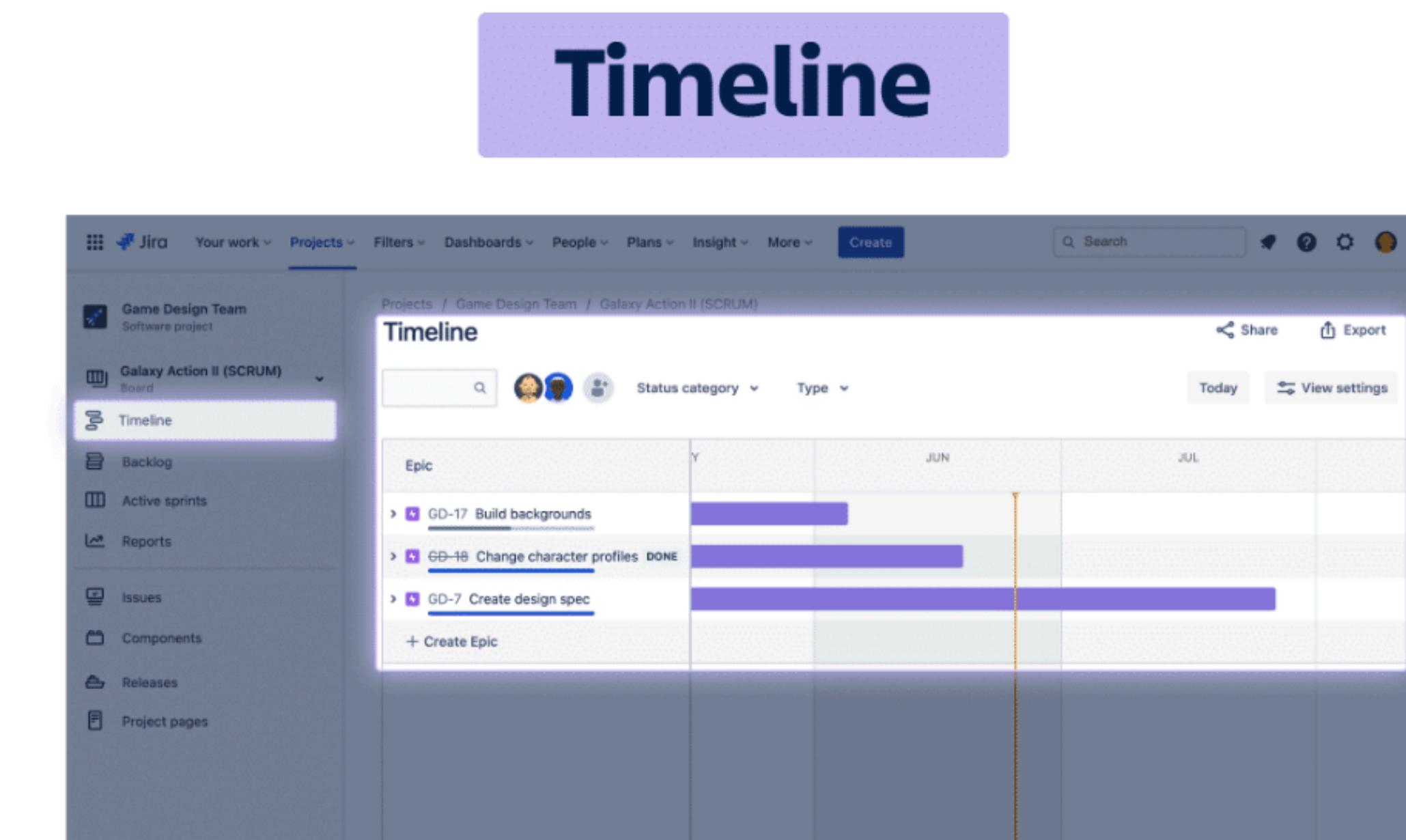
If you don't see them on your screen, check with your team leader or Jira admin.

Backlog



The screenshot shows the Jira Backlog view for the 'Galaxy Action II (SCRUM)' project. The backlog contains 11 issues, each with a checkbox and a user icon. The issues listed are: 'Review and edit the contract', 'Tribbles are not reproducing', 'Upload color codes', 'Stats aren't uploading', 'Stats are not displaying above avatar', 'Add star field background', 'Build new homepage', 'Add custom options', 'Write code for the new button feature', 'Update character design', and 'Add in'. There are also buttons for 'Create sprint', 'Create design spec', 'Select star options', and 'Build backgrounds'.

Timeline



The screenshot shows the Jira Timeline view for the 'Galaxy Action II (SCRUM)' project. The timeline displays tasks over a period from June to July. The tasks listed are: 'GD-17 Build backgrounds' (in progress), 'GD-18 Change character profiles' (done), 'GD-7 Create design spec' (in progress), and 'GD-19 Create Epic' (planned). The timeline interface includes a search bar, user icons, and buttons for 'Status category' and 'Type'.

QUIZ

Rami wants to see all his planned work in a chronological view. Where should he look?

- A. Board
 - B. Timeline
 - C. Backlog
 - D. Workflow
-

QUIZ ANSWER

Rami wants to see all his planned work in a chronological view. Where should he look?

- A. Board
- B. Timeline**
- C. Backlog
- D. Workflow

[The timeline shows all issues planned in a linear, chronological view. This will easily show Rami what he wants to see.]

The board for a project shows current work, but does not lay out work chronologically. The backlog shows work that hasn't been planned or started, but again, doesn't arrange work chronologically. The workflow is just the path your work items take from start to finish — it isn't a view of work items.]

4. Using agile boards in Jira Software

By the end of this lesson, you'll be able to:

- Describe the main components of a Jira board's interface
 - Visualize a workflow using agile boards
-

How do you use an agile board?

- Move issue cards across the board as work gets done.
- Jira boards are agile because they offer a visual way to view a set of issues and their **status** at a glance. The different status columns in a board together represent your board's workflow. A **workflow** is the path of statuses an issue will go through from start to finish.
- An example of a simple workflow is an issue moving from **To Do** to **In Progress** to **Done**.

How Graphically Jira Works

- When you make progress on work item, you can update its status by simply *dragging and dropping* its issue card to the relevant column on the board.
- ➡ For example: When you start working on a task, you'll move its issue card from the **To Do** status to **In Progress**.



There are two ways to update an issue's status.

1. On the board view, you can drag and drop the issue into a different column.
2. Or, in the issue detail view, you can click the status dropdown and select the new status.

Issues can move forward and backward in a workflow, depending on how the work gets done. Your team can customize your board's workflow and statuses to best represent how you work.

What's the difference between team-managed and company-managed boards?

There are two types of projects in Jira Software: **team-managed** and **company-managed**. However, boards will behave differently depending on their project type. The major difference between team-managed and company-managed boards is **what issues and projects they can display**.

- **TEAM-MANAGED**

A team-managed project will only ever have a single built-in board that includes issues from only that single project. Additional boards cannot be added to a team-managed project.

- **COMPANY-MANAGED**

Company-managed boards can include issues from a single project or from multiple projects, including team-managed projects. Company-managed projects can have multiple associated boards.

Both team-managed and company-managed project boards include features for grouping and filtering issues on the board.

Change what work appears on a board using the board filter.

- Teams can change what work appears on their board using the **board filter**. The board filter finds and displays issue cards on a board based on criteria your team chooses.
- **Company-managed** project boards include quick filters that allow users to limit which issues are displayed. The filters are constructed using JQL and appear as buttons on the board.

Company-managed projects use **quick filters**.

Quick Filters

Quick Filters can be used to further filter the issues in the board based on the additional JQL query.

Name	JQL	Description
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Lowest	priority = Lowest	Lowest priority issues
Highest	priority = Highest	Highest priority issues

Quick filters appear as buttons on the board.

Projects / Web Design Team / WDT board

Kanban board

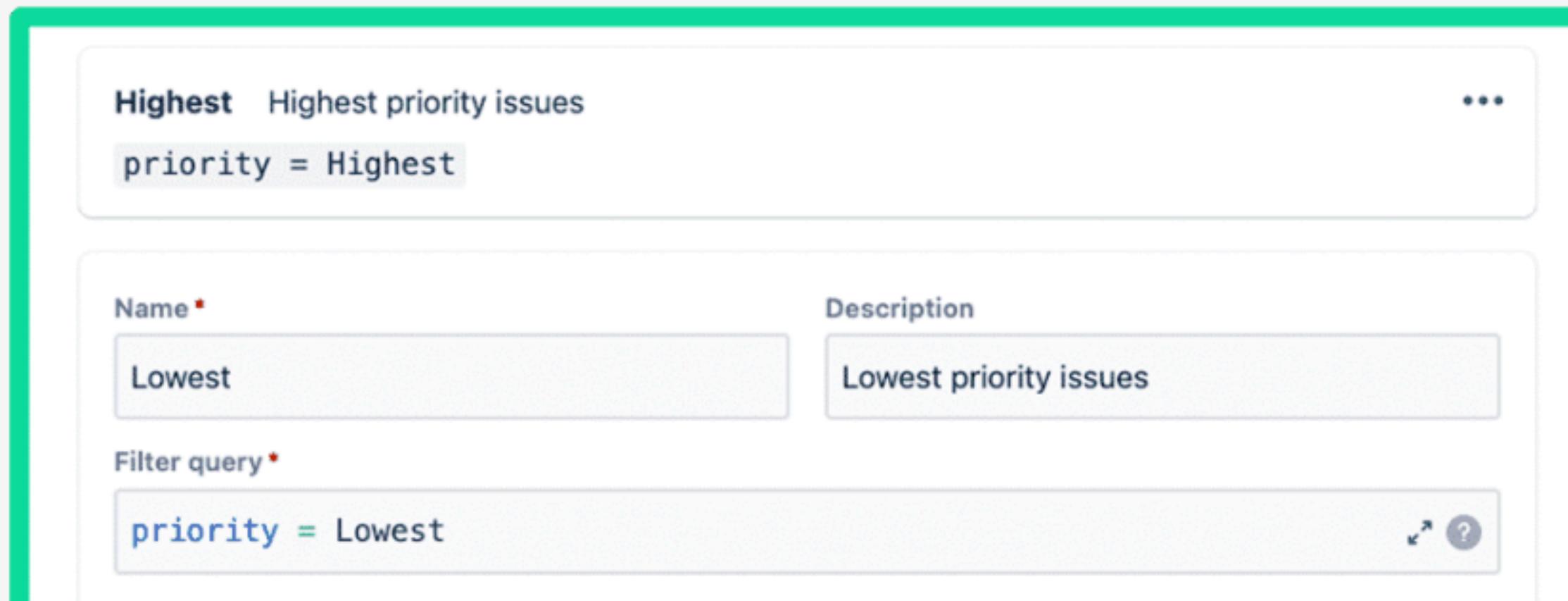
Search this board 08 Lowest Highest

BACKLOG 3	SELECTED FOR DEVELOPME... 1	IN PROGRESS 1
Company Website Refresh COMPANY WEBSITE REFRESH WDT-6	Design navigation menu WDT-2	Build landing page WDT-1

Team Managed

- Team-managed project boards include a very similar feature, called custom filters. The filters are constructed using JQL and appear as checkboxes on the board.
-  In this example, a team-managed project uses custom filters to show only the Highest priority issues or Lowest priority issues. They will appear as checkboxes on the board.

**Team-managed projects
use **custom filters**.**

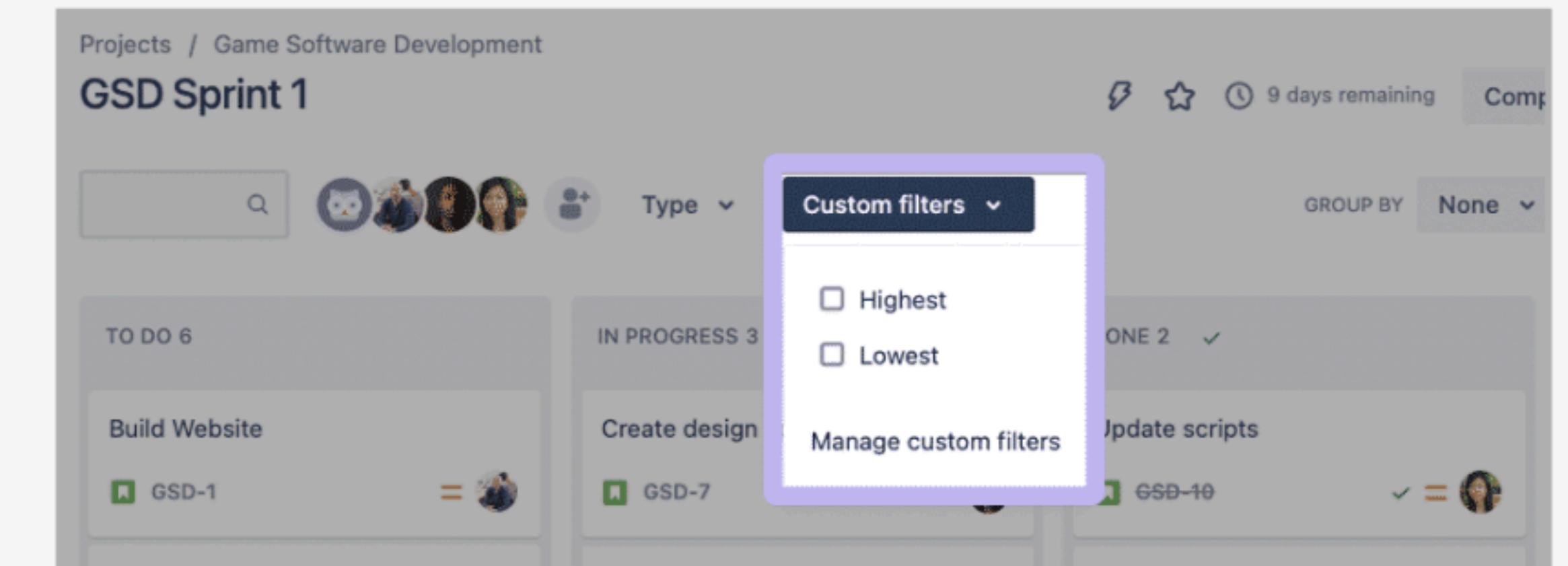


Highest priority issues
priority = Highest

Lowest

Filter query
priority = Lowest

**Custom filters appear as
checkboxes on the board.**



Projects / Game Software Development
GSD Sprint 1

9 days remaining

Custom filters

- Highest
- Lowest

Manage custom filters

TO DO 6

IN PROGRESS 3

ONE 2

Build Website

Create design

Update scripts

GSD-1

GSD-7

GSD-10

Can you group issues in different sections on a board?

Visually group issues with swimlanes.

- Swimlanes are horizontal sections of boards containing issues with a common characteristic.
- On company-managed project boards, swimlanes can include JQL queries to determine the contents of each lane.
- Team-managed project boards have a similar feature to group issues horizontally, but it only allows grouping by assignee, subtask, or parent issue.

Example on next page, the issues in this swimlane relate to Build a new homepage.

TO DO 3 ISSUES

IN PROGRESS 2 ISSUES

DONE ✓

▼  PL-3 Build new homepage 3 issues IN PROGRESS

Identify layout for web and app

 PL-4



Build website graphics

 PL-5



Launch online ecomm site

 PL-6

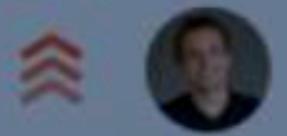


+ Create issue

▼ Issues without Epic 2 issues

Complete campaign plan to
launch for Q4

 PL-1



Set up tracking for campaign
activities for Q3

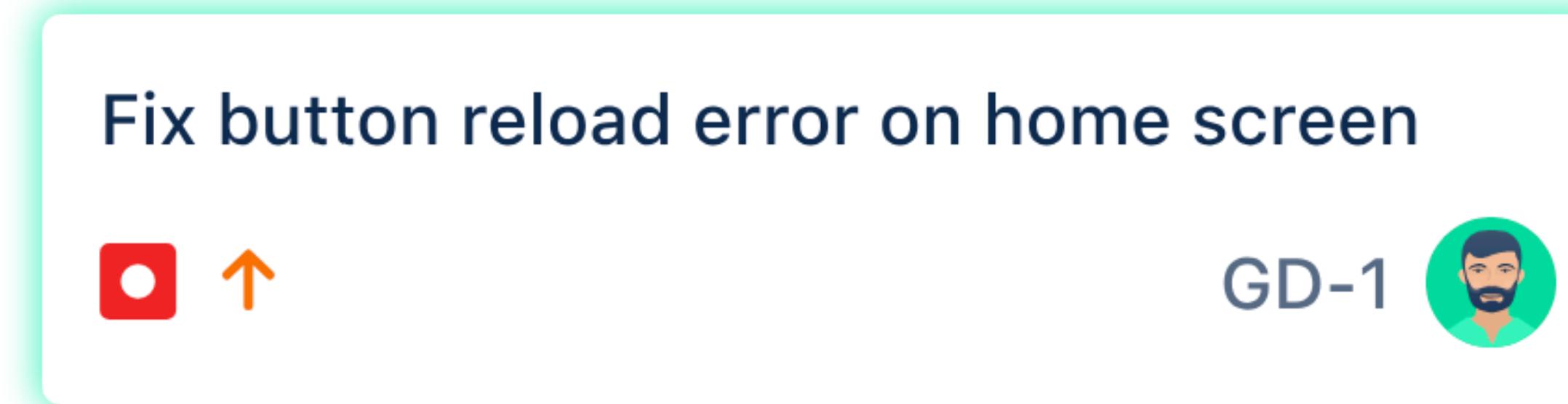
 PL-2



Q See all Done issues

Change without opening an issue

- Your team can also change what fields appear on your board's issue cards so you can see important information without opening an issue. This is the card layout. Many teams set up cards to show who's assigned to work on that issue.
- 👤 The icons on the bottom of this card represent information about this issue. For example, the person is the user assigned to work on this issue.



- The board admin will configure board filter and swimlanes.

QUIZ

Amina doesn't see one of her issues on her team's board. What controls which issues appear on the board?

- A. Board filter
 - B. Card layout
 - C. Swimlane
 - D. Project sidebar
-

QUIZ ANSWER

Amina doesn't see one of her issues on her team's board. What controls which issues appear on the board?

A. Board filter

- B. Card layout
- C. Swimlane
- D. Project sidebar

[Teams can change what work appears on their board using the board filter. The board filter finds and displays issue cards on a board based on criteria your team chooses.

The card layout controls what information is shown on issue cards, not which issue cards are shown on a board. Swimlanes group issues on boards, but don't control which issues are on a board. The project sidebar is simply a navigation tool; it does not impact the board.]

QUIZ

Which of the following is NOT true regarding updating an issue's status on a board?

- A. You can select a new status from the status dropdown in the issue detail view.
 - B. Issues can move backward in a workflow.
 - C. You can drag and drop the issue into a different column on a board.
 - D. Issues can only move forward in a workflow.
-

QUIZ ANSWER

Which of the following is NOT true regarding updating an issue's status on a board?

- A. You can select a new status from the status dropdown in the issue detail view.
- B. Issues can move backward in a workflow.
- C. You can drag and drop the issue into a different column on a board.
- D. Issues can only move forward in a workflow.**

[There are two ways to update an issue's status. On the board view, you can drag and drop the issue into a different column. Or, in the issue detail view, you can click the status dropdown and select the new status.]

Issues can move forward and backward in a workflow, depending on how the work gets done.]

ASSIGNMENT 1

Jira Software Basics Exploration

SECTION 2

Managing Your Work in Jira Software

You'll learn all about issues – the key to organising, managing, and collaborating on your work in Jira Software.

This section will cover:

- 1. Issue basics in Jira Software**
- 2. Creating new issues in Jira Software**
- 3. Updating issues in Jira Software**
- 4. Collaborating on issues in Jira Software**

1. Issue basics in Jira Software

By the end of this lesson, you'll be able to:

- Define common issue fields
- Understand different issue types in the hierarchy and their purpose

Let's take a closer look at issues.

What's inside an issue?

- When you open an issue, you'll see the issue detail view .
- To see the issue detail view, just click an issue. **(Go to Jira Software and try!)**
- In this view, you'll see many fields. Fields contain information about an issue, including the due date, assignee, comments from teammates, priority levels, and links to related media.
- As a Jira user, you'll spend a lot of time with issue fields. Make sure you fully understand each field and what you can find in them.

List of the fields

- The **issue key** is a unique identifier given to each issue. Issue keys contain the project key and a sequential number. In the example below, the issue key is GD-8. To the left of the issue key is a small icon. This icon indicates the issue type. You'll learn more about issue types below. Why is this field important? The issue key helps you find issues or refer to work with your teammates.
- The **summary** is the short title or name of the issue. Why is this field important? The summary helps you quickly recognize the issue. It appears on the issue card as the issue name.
- The **description** is a place to add supporting details about the issue. Why is this field important? The description helps you better explain and understand an issue.
- The **due date** is the date this issue should be complete. Why is this field important? Paying attention to issue due dates will help you prioritize work and plan for upcoming weeks.
- The **assignee and reporter** fields show the people associated with the issue. The assignee is the person assigned to work on the issue. The reporter is the person who created the issue. Why are these fields important? If you have a question about an issue, the assignee and reporter fields tell you which teammate to contact.
- **Labels** allow you to categorize issues. You can use many labels to track different information about a work item. Why is this field important? You can use labels to group issues, like adding a "Marketing" label to all marketing-related work, or adding "product update" to keep track of all updates your team makes.

NOTE:

- Your specific **fields** will be customized based on your team. Check with your project manager or Jira admin to know which specific **issue** fields your team will be using.
-

Not all issues are the same.

There are different types of issues based on their size and category of work.

- Some issues are large. Others are small. Some are about starting new work. Others are about fixing old problems.
- With a wide variety of work, teams need different ways to categorize their different issues. The issue type tells you the category and size of the work to get done.

What are the default issue types?

In Jira Software, the default issue types are **epic**, **story**, **task**, **bug**, and **subtask**.

1. Epic

An epic is a large initiative. Known as "parent" issues, epics contain smaller issues within them. They often represent large bodies of work that can break down into smaller tasks. It will be up to you and your team to decide what's a large initiative and what's not.

2. Story

A story is a feature or requirement from the user's perspective. Stories are commonly used by software development teams. They define work items in non-technical language. For example, "As a user, I need a back button on this screen." Stories are at the same hierarchical level as tasks, and some teams use the two issue types interchangeably.

3. Bug

A bug describes a problem or error, mostly used in software development teams. They can exist within a larger epic or exist all on their own.

4. Task

A task is the most common issue type. They contain a more detailed description of a work item. Tasks can exist within a larger epic or all on their own.

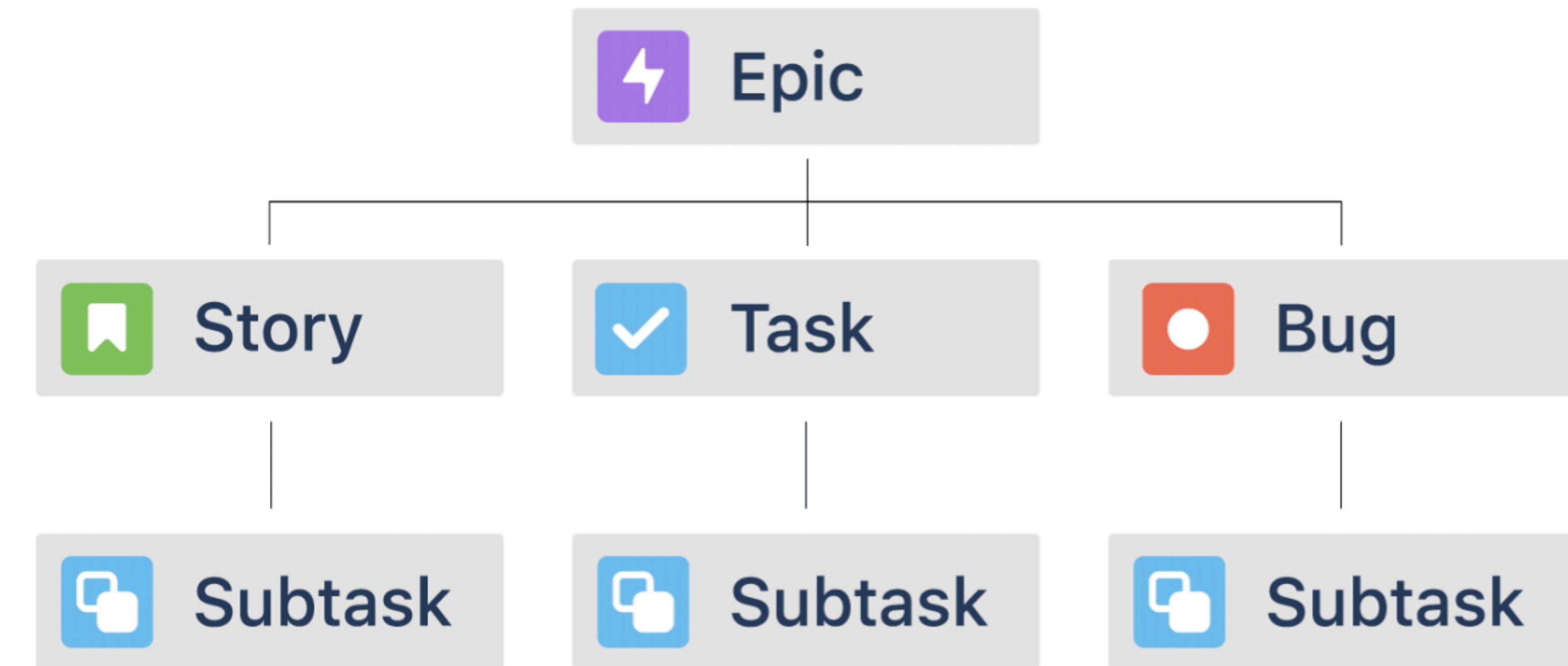
5. Subtask

A subtask is a further defined issue, used to break down tasks, stories, or bugs into smaller work items. Subtasks must have a parent issue type. They cannot exist on their own.

What is the issue type hierarchy?

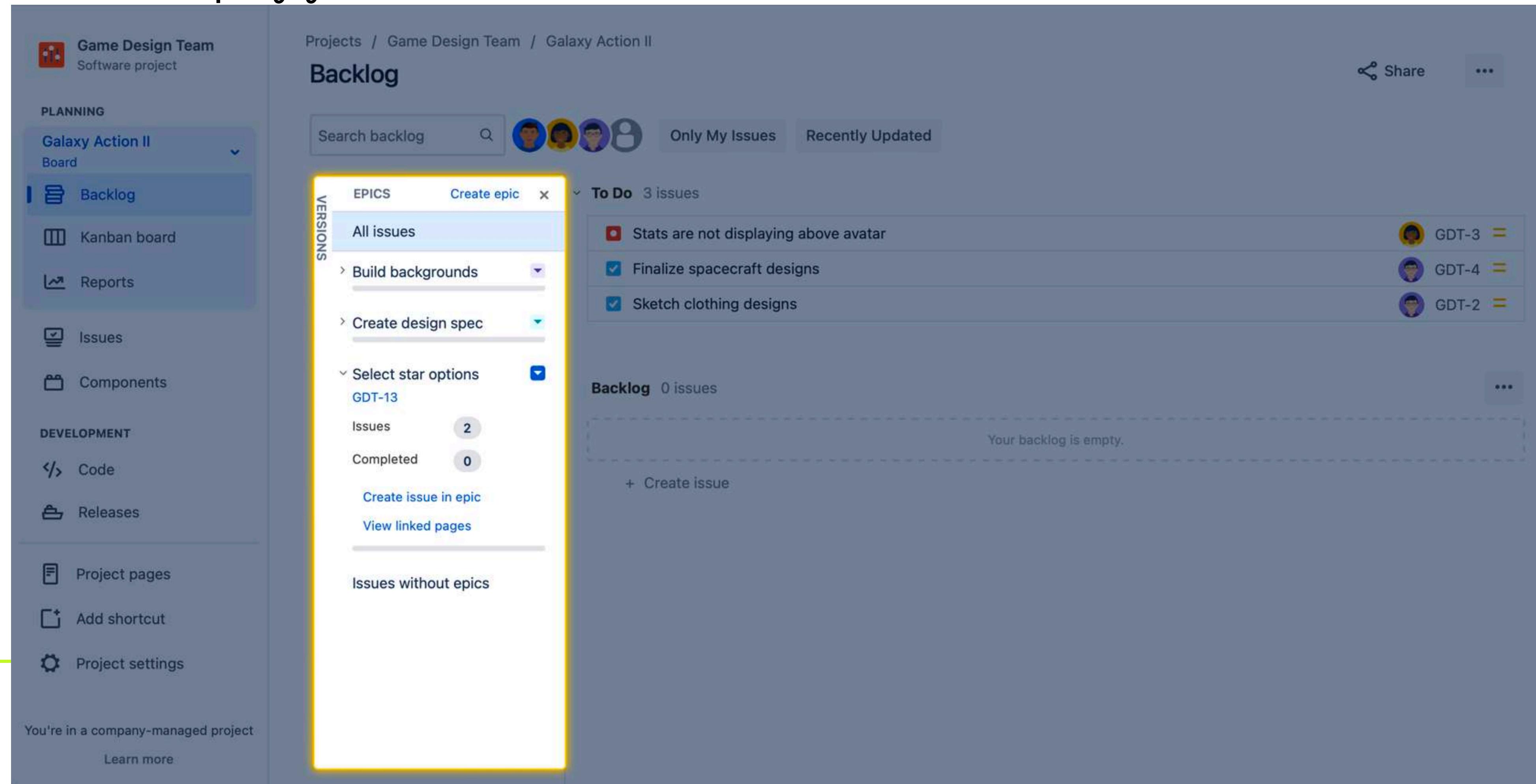
These issue types are organized into a hierarchy based on the size and category of work.

👉 This is the hierarchy of the default issue types.



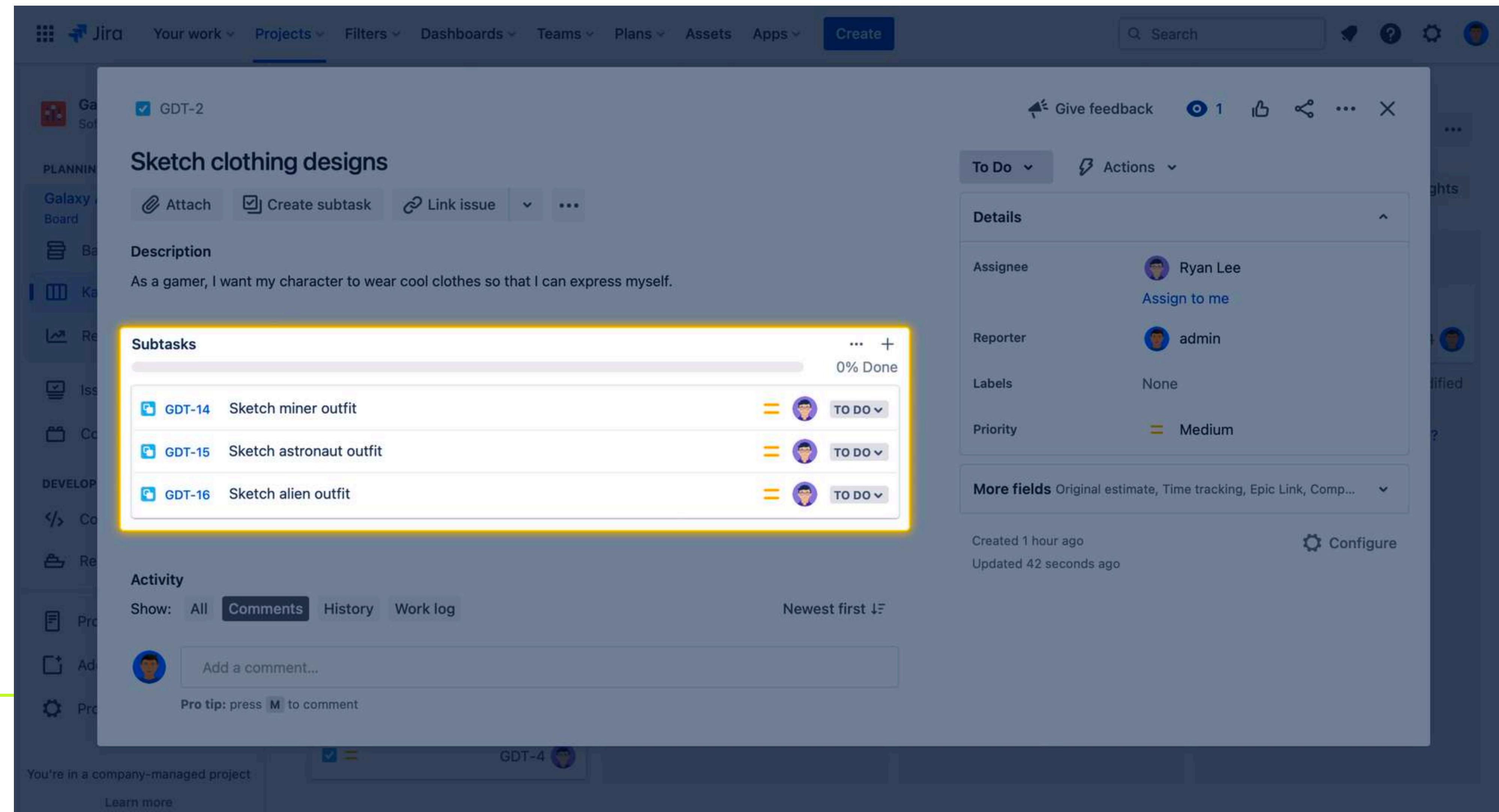
Where can you see issue types?

- Epics appear in the Epics panel of the backlog. They may also appear on your board, depending on how it was set up by your team.



The screenshot shows a Jira backlog page for the 'Game Design Team' project, specifically for the 'Galaxy Action II' board. The left sidebar shows various project management sections like Planning, Development, and Components. The main area is titled 'Backlog' and shows a 'To Do' list with three issues: 'Stats are not displaying above avatar' (assigned to GDT-3), 'Finalize spacecraft designs' (assigned to GDT-4), and 'Sketch clothing designs' (assigned to GDT-2). Below the backlog, a message says 'Your backlog is empty.' A yellow box highlights the 'EPICS' panel on the left, which includes a 'Create epic' button and a list of versions: 'All issues', 'Build backgrounds', 'Create design spec', 'Select star options (GDT-13)', 'Issues (2)', 'Completed (0)', 'Create issue in epic', 'View linked pages', and 'Issues without epics'.

- **Stories, tasks, and bugs** appear both in the backlog and on your board.
- You can see an issue's **subtasks** by opening the issue. Subtasks won't appear in the backlog. They also may not appear on your board, depending on how your team set it up.



The screenshot shows a Jira issue detail page for a story titled "Sketch clothing designs" (GDT-2). The story is in the "To Do" status. The subtasks section is highlighted with a yellow box. The subtasks listed are:

- GDT-14 Sketch miner outfit
- GDT-15 Sketch astronaut outfit
- GDT-16 Sketch alien outfit

Each subtask has a status of "TO DO" and a progress of 0% done. The main story details include an assignee (Ryan Lee), reporter (admin), labels (None), and priority (Medium). The activity section shows the story was created 1 hour ago and updated 42 seconds ago. The "Comments" tab is selected in the activity bar.

How are issue types used?

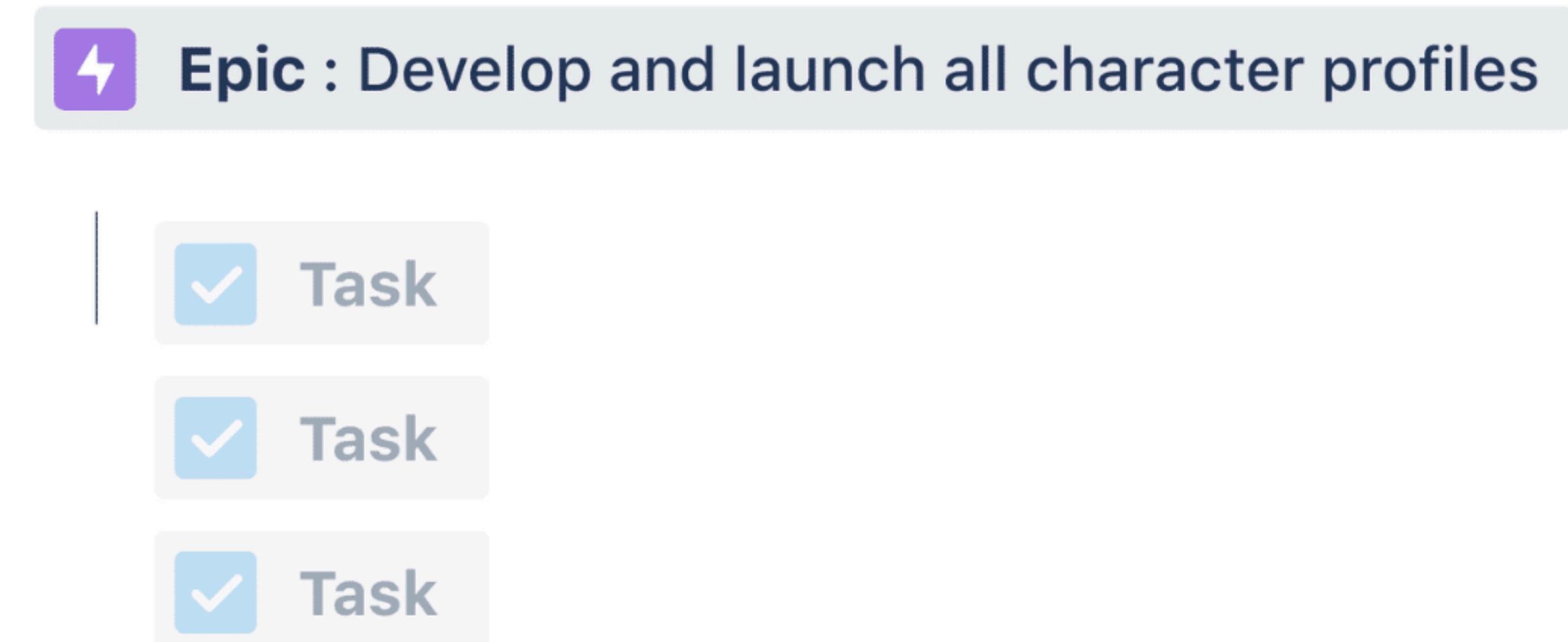
Let's look at an example.

Imagine a game design team building a space-inspired video game. They use the default issue types — **epics**, **tasks**, **stories**, **bugs**, and **subtasks** — to organize their work.

EPICS

How does the game design team use epics?

- One large initiative for this team is to 'Develop and launch all character profiles.'
- This is a large body of work that will have smaller work items within it. In the image below, you'll see that 'Develop and launch all character profiles' is an issue at the epic level. Underneath the epic, there are multiple tasks to complete.



TASKS/STORIES

How does the game design team use tasks and stories?

- Within the epic 'Develop and launch all character profiles,' there are multiple tasks that need to get done.
- Each task is actionable and well-defined. Day-to-day, the team will mostly be working from these task-level issues. Notice how each task-level issue is a part of the larger epic.



Epic : Develop and launch all character profiles



Task : Sketch V1 of all core characters



Task : Design profile layout UI

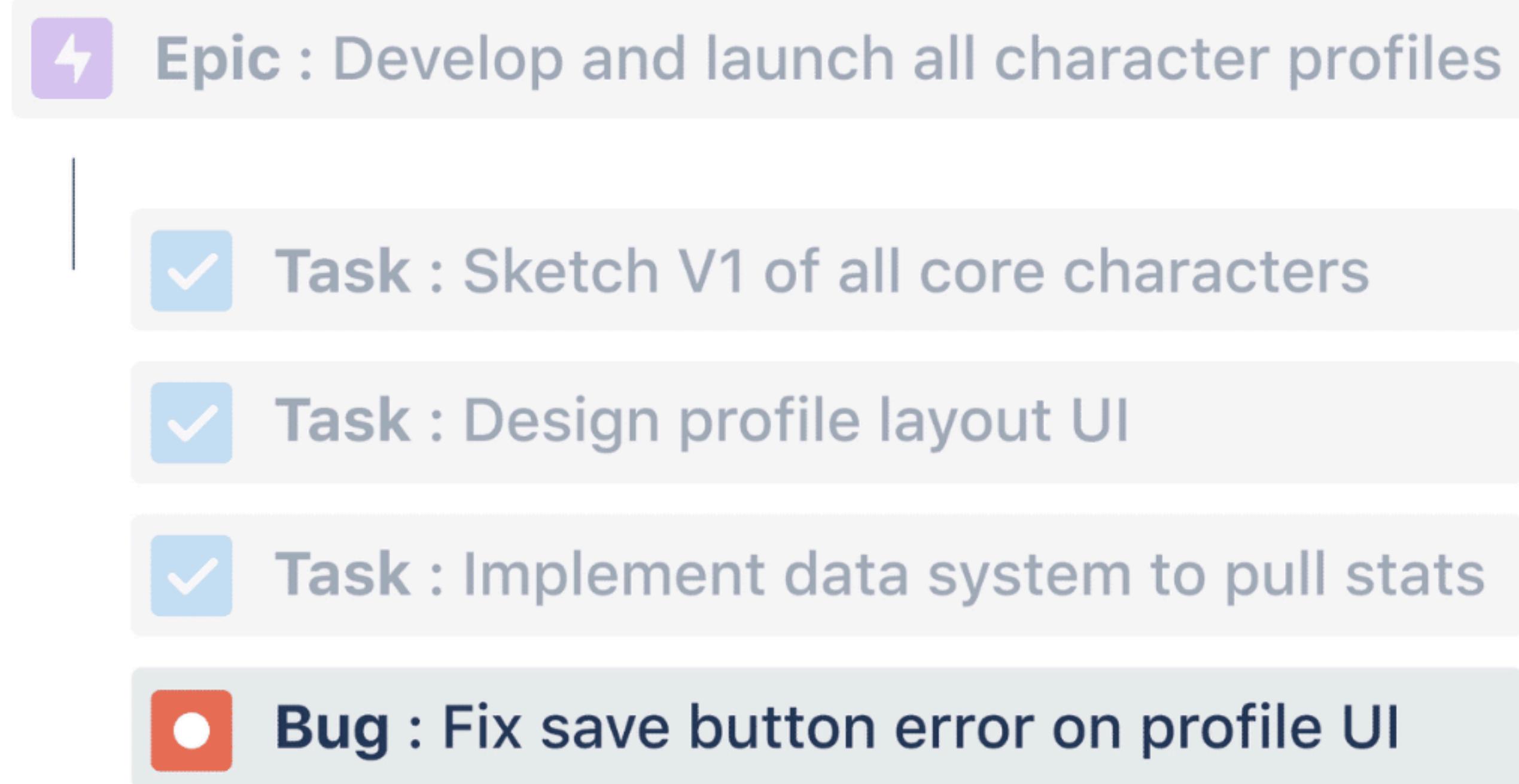


Task : Implement data system to pull stats

BUGS

How does the game design team use bugs?

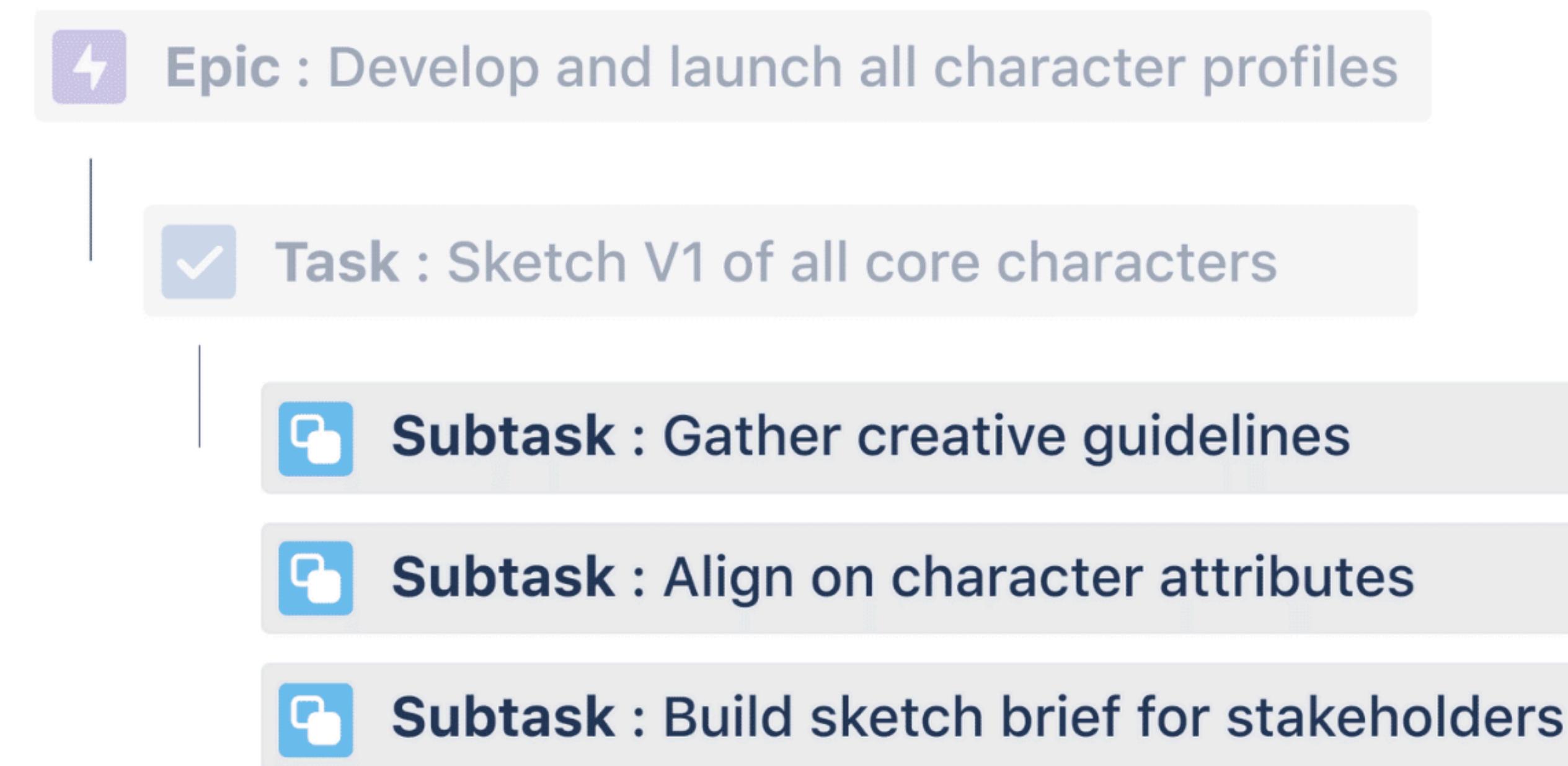
- When the game was in review, an error was found on the profile layout UI. The save button wasn't working correctly. The team added a bug issue, 'Fix save button error on profile UI,' to this epic. This will help the team resolve the bug right away.



SUBTASKS

How does the game design team use subtasks?

- Sometimes tasks and stories need to be broken down even further.
- Within the task 'Sketch V1 of all core characters,' there are some smaller steps that need to happen. The game design team has created subtasks for each of these steps.



EXERCISE

Want to explore an issue in your own Jira?

- 1. Open an issue: Click any issue on the board to view its details.**
 - 2. Check the assignee and reporter: See which teammates are involved with this issue.**
 - 3. Identify the issue type: Hover your cursor over the issue type icon.**
 - 4. Check the comments: See if this issue has any relevant comments.**
-

QUIZ

What must a subtask always have?

- A. A parent issue
 - B. An epic
 - C. A due date
 - D. A board
-

QUIZ ANSWER

What must a subtask always have?

- A. A parent issue**
- B. An epic
- C. A due date
- D. A board

[Subtasks must always have a parent issue.

That parent issue may be an epic, but it does not have to be. Subtasks might have a due date, but it isn't always required. And, subtasks may or may not appear on a board; that also isn't required.]

QUIZ

Where can you always see a subtask in your project?

- A. Backlog for your project
 - B. Issue detail view of its parent issue
 - C. Board for your project
 - D. Swimlane on your board
-

QUIZ ANSWER

Where can you always see a subtask in your project?

- A. Backlog for your project
- B. Issue detail view of its parent issue**
- C. Board for your project
- D. Swimlane on your board

[Subtasks will always appear in the issue detail view for their parent issue.
They might not appear on boards, swimlanes, and backlogs.]

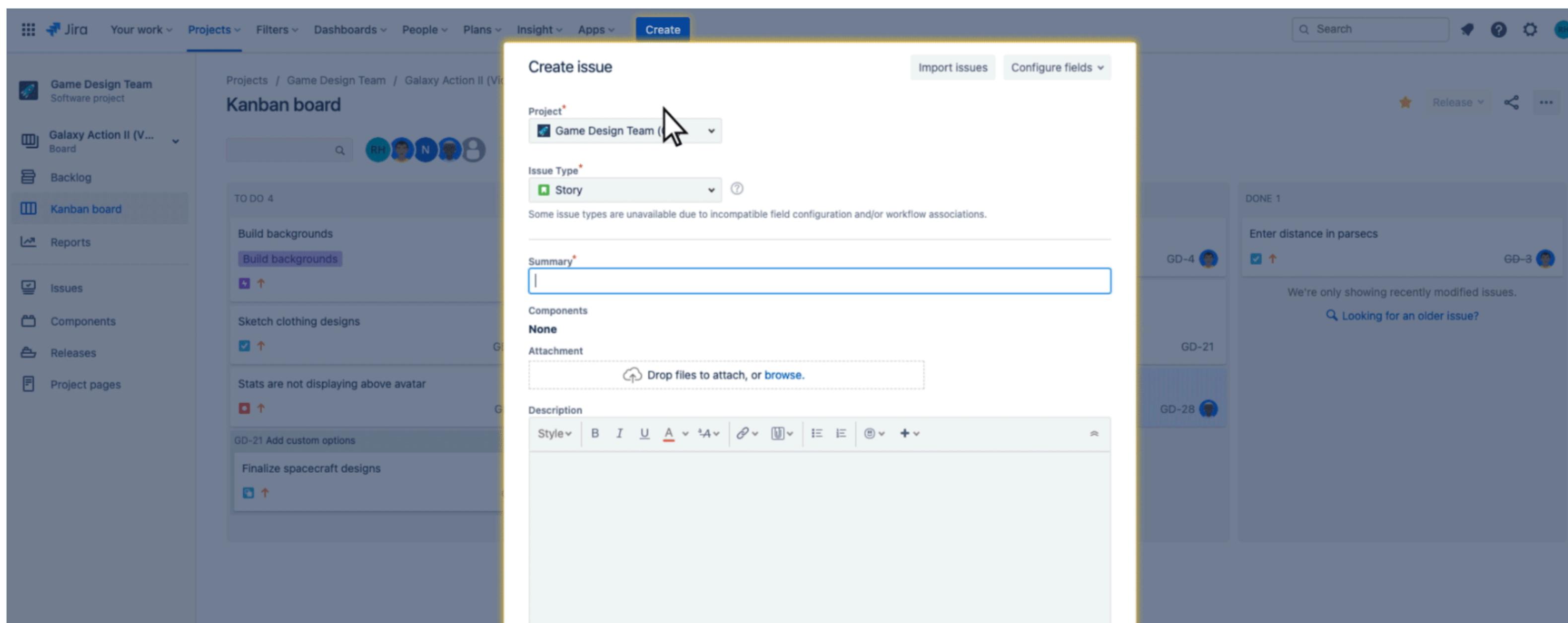
2. Creating new issues in Jira Software

By the end of this lesson, you'll be able to:

- Create new issues in Jira Software
 - Find newly created issues
 - Clone existing issues
 - Assign an issue
-

Let's create an issue!

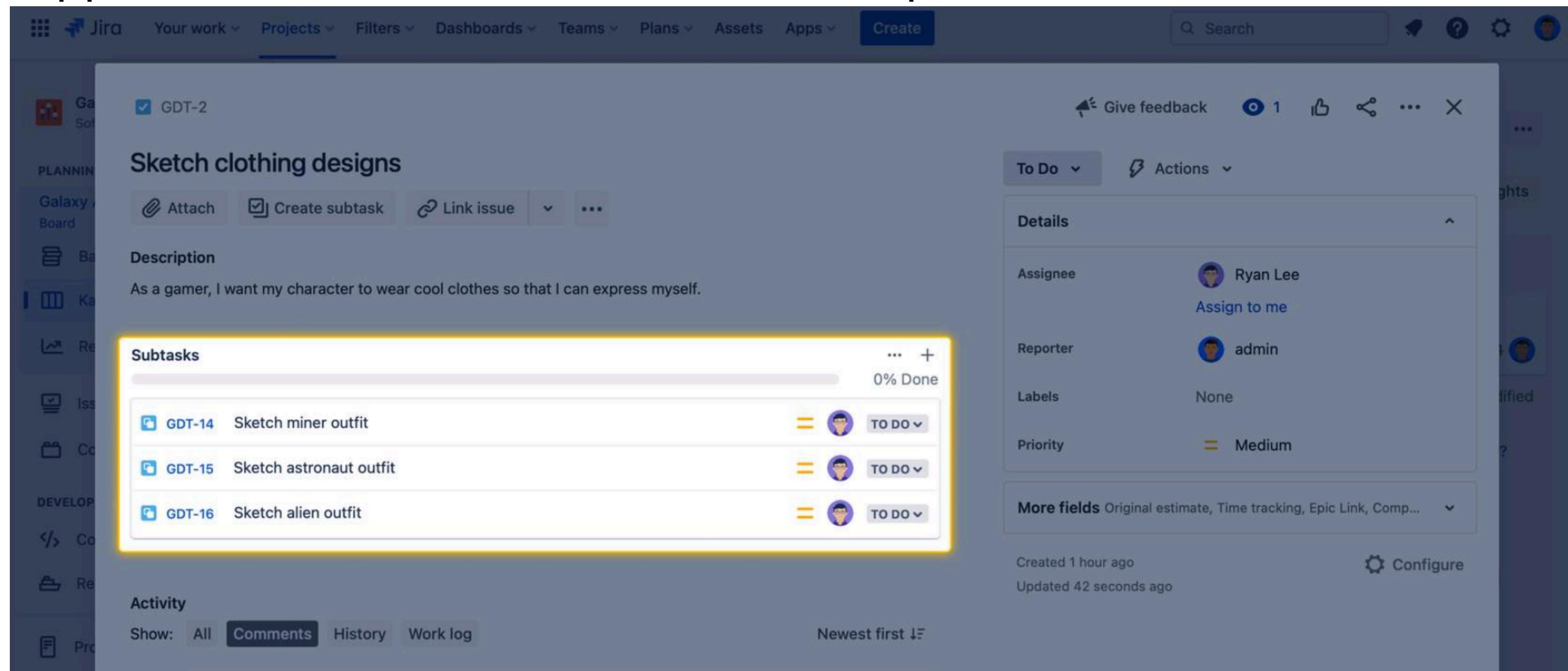
- Your main role will be to update issues in Jira Software, but you may also create them.
- To create an issue, click the Create button in the main navigation bar or press c on your keyboard.



NOTE: Some teams prefer that only project managers or scrum masters create new issues. Other teams enable any Jira user to create new issues. Before you start creating your own issues, check with your project manager.

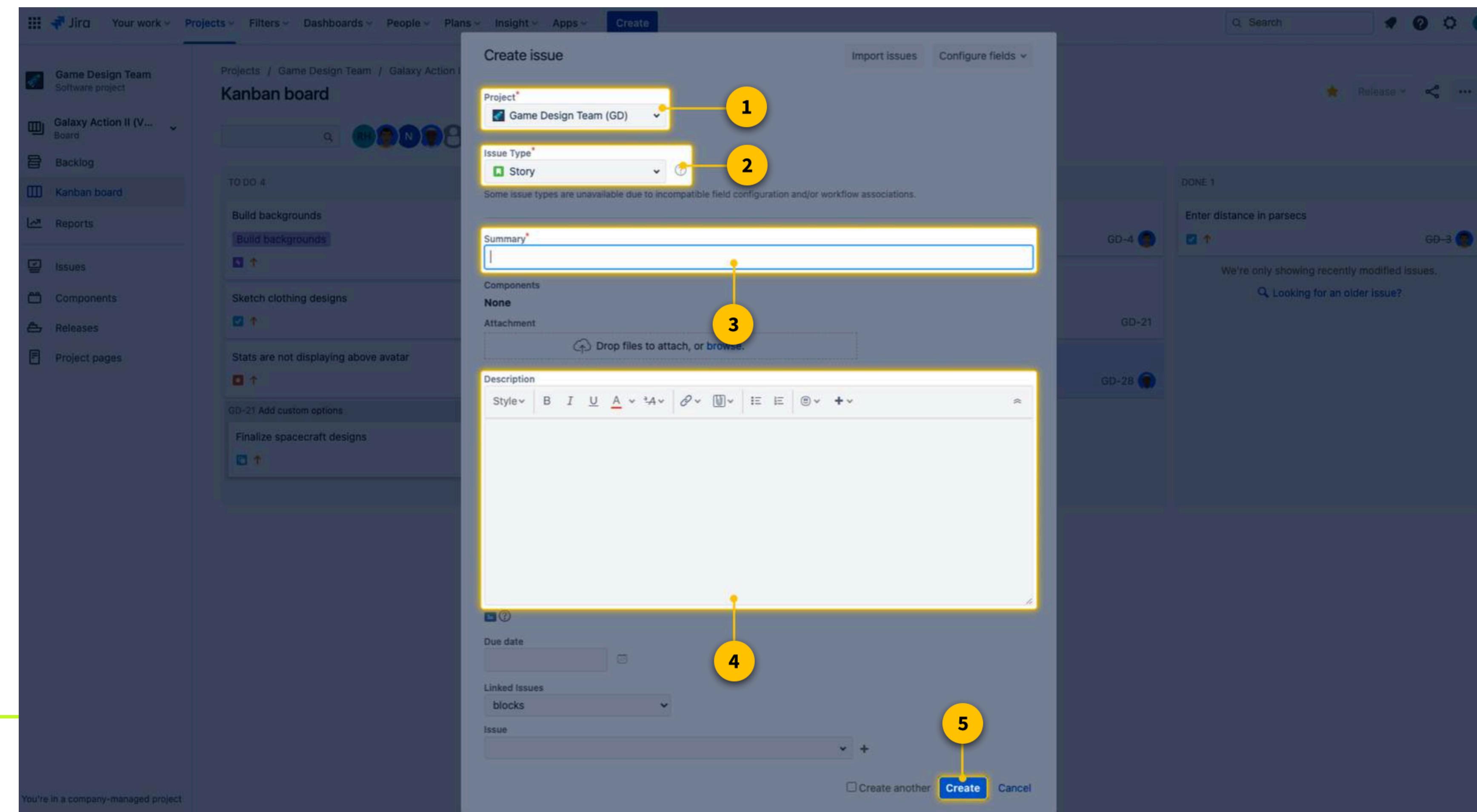
Creating issues in a hierarchy

- You can also create issues within other issues, like creating a story within an epic, or a subtask within a task. In fact, subtasks can only be created within another issue.
-  Subtasks appear in the issue detail view for their parent issue.



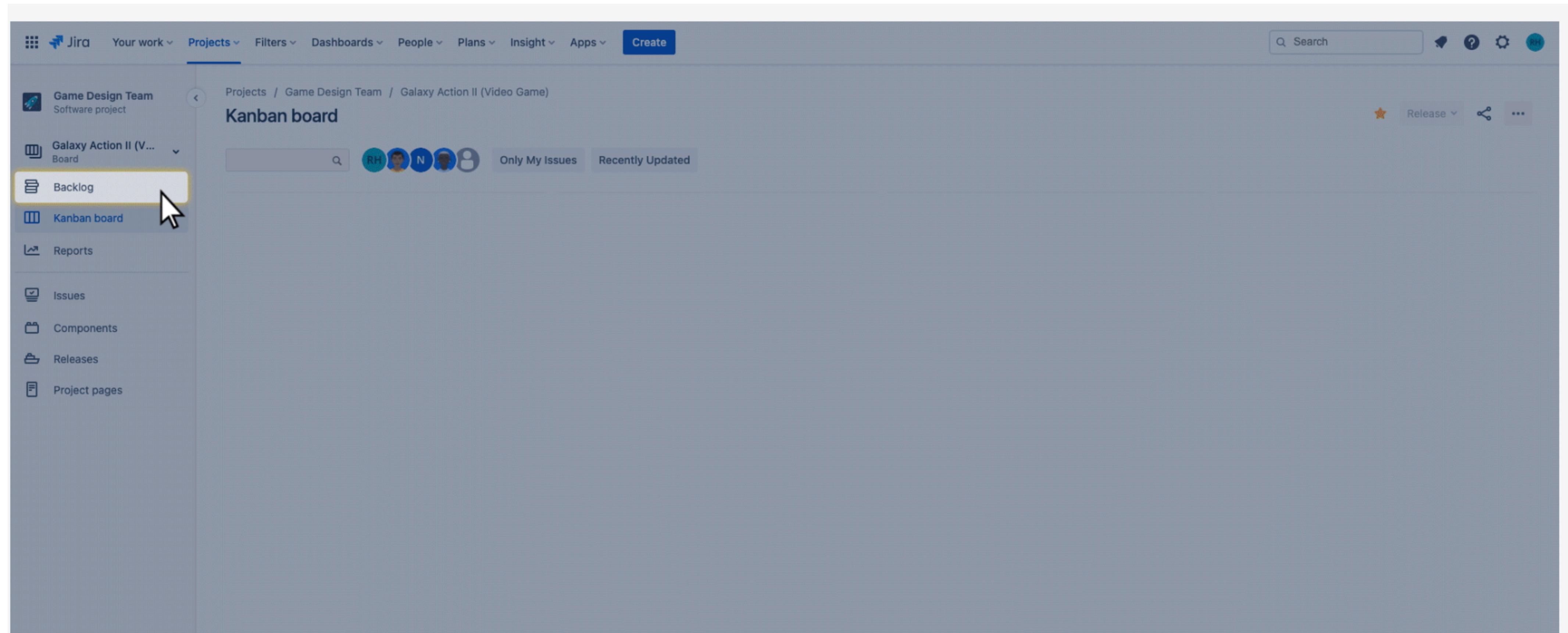
Which fields should you fill out?

Start with the required information: **project**, **issue type**, and **summary**. The **description** field is optional, but filling it out helps give your issue more context.



You created an issue! Where did it go?

- The best place to look for your new issue is the backlog. You can find issues in your project there.



What if you want to create many similar issues?

- You can clone issues to create new issues with the same information.
- If you want to create multiple issues with a lot of the same information, you can **clone** an existing issue.
- For example: Let's say you have three work items that will:
 - be assigned to you
 - have the same label
 - have the same due date
- You could create one issue and fill out the assignee, label, and due date fields. Then, **clone that issue twice** to create two additional issues with the same information.

Let's try!

How do you clone an issue?

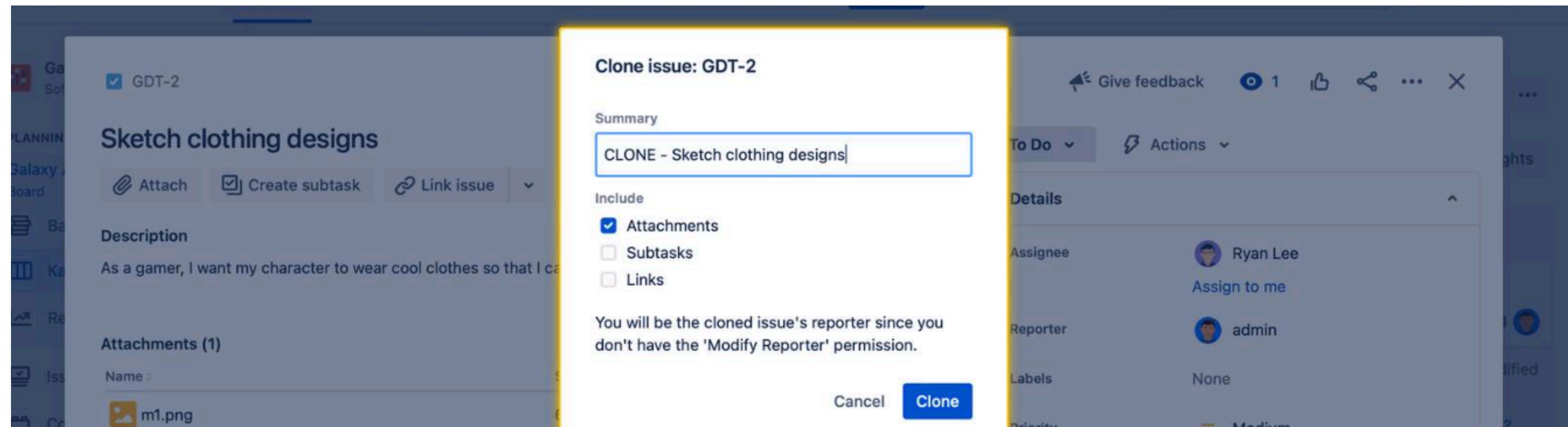
- Open the issue you want to clone.
- Make sure the information you want to clone is filled out.
- In the upper-right corner, click the more actions menu (represented by •••).
- Click Clone.

👉 You can clone issues from the issue detail view.



What information is cloned?

- ✓ Most information is cloned, including the **issue** type, **labels**, **assignee**, and more.
- ✗ However, not all information on a ticket is cloned. Any **comments**, **history**, or **time tracking** won't be cloned.
- You can **choose** whether you want the cloned issue to have the same **attachments**, **subtasks**, and **links** as the original issue.



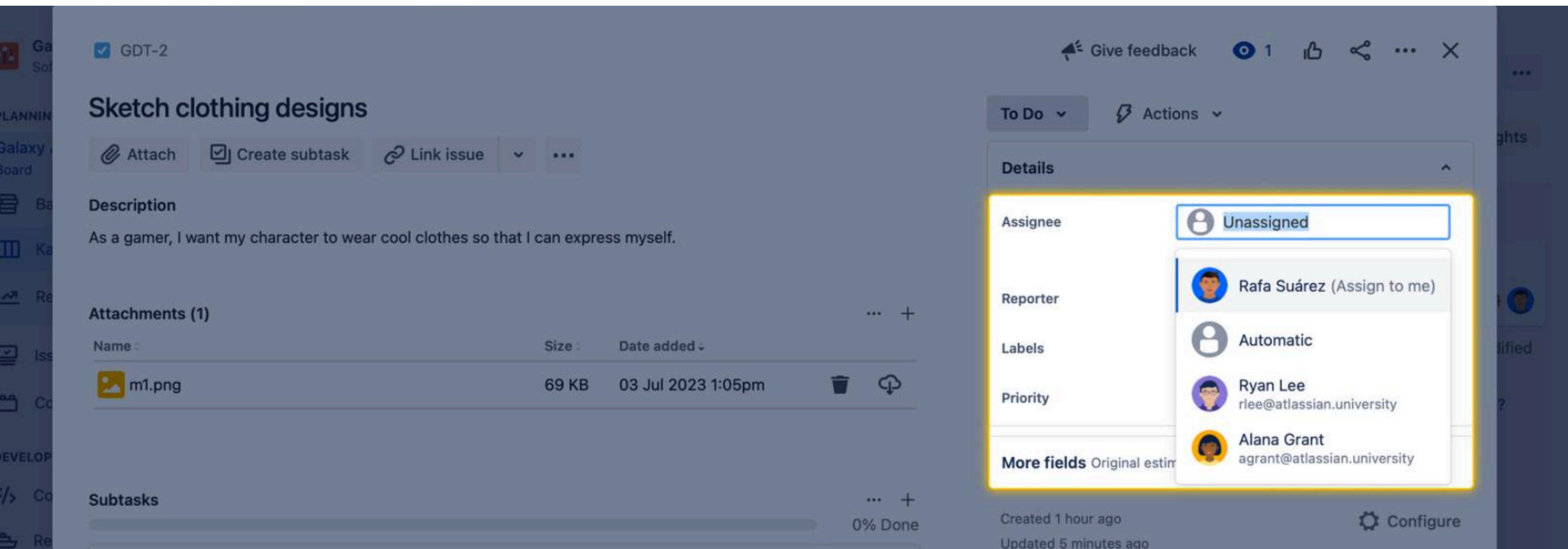
Some information is modified.

When you clone an issue, some fields change. This is because you've created a new issue in your project, even if it copied some of the information from an existing issue.

1. **Issue key** - The issue key changes to whatever the next sequential key is in your project. Each issue in your project needs to have its own issue key.
2. **Status** - The status becomes the first status in the workflow, like To Do.
3. **Summary** - The word "CLONE" is added to the issue's summary.
4. **Created and updated dates** - The created and updated dates change to reflect when you created and updated the new, cloned issue.

Assigning existing issues

- What do you do if you want to assign an existing issue to yourself?
- You might need to assign yourself to issues you didn't create. For example, you could work on an issue another teammate was assigned to originally. Or, you might need to add yourself as the assignee on an issue that doesn't have anyone assigned.
- The Assignee field is either empty (Unassigned), or a single user. You can assign an issue to yourself or a teammate by opening that issue and clicking the Assignee field.



The screenshot shows a Jira issue details page for an issue titled "Sketch clothing designs" (ID: GDT-2). The "Assignee" field is currently set to "Unassigned". A dropdown menu is open, showing a list of users: Rafa Suárez (with a "Assign to me" link), Automatic, Ryan Lee, and Alana Grant. The "Assignee" field is highlighted with a yellow box.

Assignee
Unassigned
Rafa Suárez (Assign to me)
Automatic
Ryan Lee rlee@atlassian.university
Alana Grant agrant@atlassian.university

Note: You may not be able to assign yourself to all issues. Or, issues may be assigned automatically. Check with your project manager to see how your project is set up.

EXERCISE

1. You have a new work task to update the character design:

1. Create a new issue in Jira
2. This issue is at the task level, choose the correct issue type
3. Name the issue a 'update character design'
4. Now, assign this issue to yourself
5. Create the issue

2. The issue is created, look for it in the backlog:

1. Find and select the issue 'update character design'
2. Change the issue status to 'To Do'
3. Go to the Kansan Board in the project sidebar
4. Find and select the issue 'update character design'
5. Move it into 'In Progress'

QUIZ

Jade just created a new issue, but it's not on her board. Where is the first place she should look to find her new issue?

- A. Main navigation bar
 - B. Timeline
 - C. Backlog
 - D. Board dropdown
-

QUIZ ANSWER

Jade just created a new issue, but it's not on her board. Where is the first place she should look to find her new issue?

- A. Main navigation bar
- B. Timeline
- C. Backlog**
- D. Board dropdown

[Most new issues will go to the Backlog.]

You may find issues in the Timeline, but it isn't the place you should check first. The main navigation bar can help you move around Jira, but it won't quickly help you find new issues. The Board dropdown will help you switch between boards, but not necessarily find new issues.]

QUIZ

True or false: You can assign multiple users to an issue using the Assignee field.

- A. True
 - B. False
-

QUIZ ANSWER

True or false: You can assign multiple users to an issue using the Assignee field.

- A. True
- B. False**

[You can only assign one user to an issue in the Assignee field.]

3. Updating issues in Jira Software

By the end of this lesson, you'll be able to:

- Edit an issue's details
- Link issues to other issues and additional content
- Move an issue
- Delete an issue

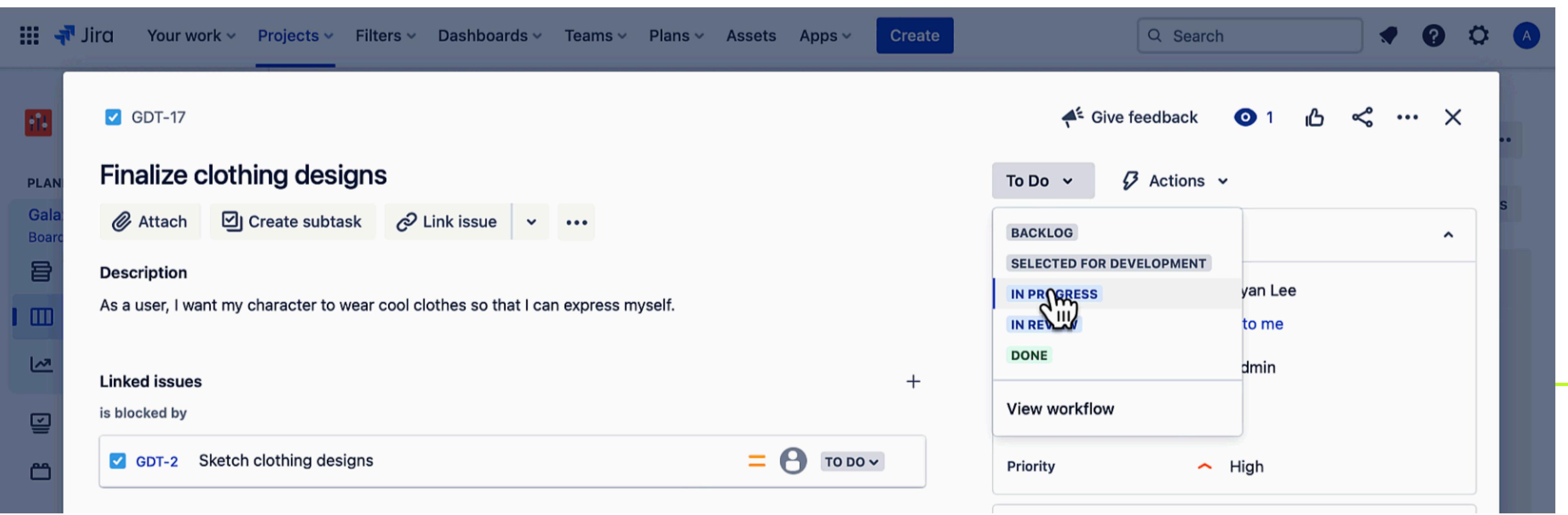
Editing issues

Keep your team in the loop by updating your issues.

Once you've created an issue, you should update it any time you have new information.

👉 For example: When you start working on an issue, you change the Status field from To Do to In Progress. You can do this by opening the card and changing the field, or by dragging it to the In Progress column on your board.

How to change the Status field from the dropdown menu.

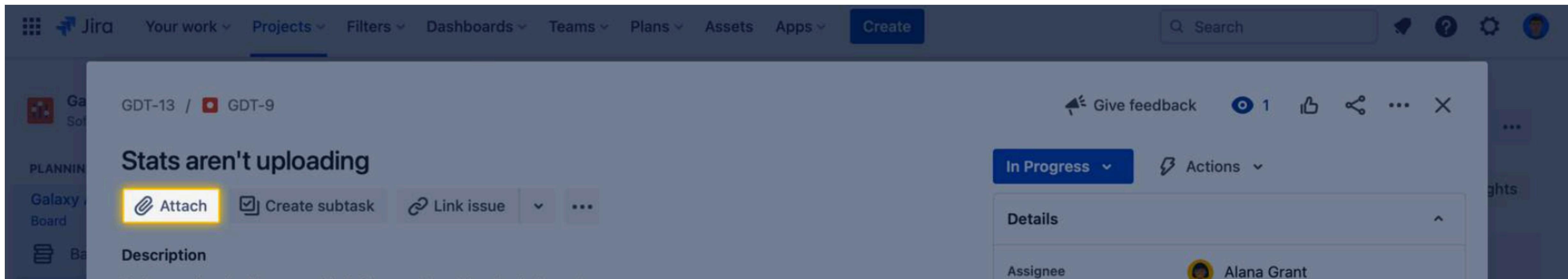


The screenshot shows a Jira issue card for 'GDT-17: Finalize clothing designs'. The card includes fields for Attach, Create subtask, Link issue, and a description: 'As a user, I want my character to wear cool clothes so that I can express myself.' A 'Linked issues' section shows 'Sketch clothing designs' (GDT-2). The status dropdown menu is open, showing options: BACKLOG, SELECTED FOR DEVELOPMENT, IN PROGRESS (highlighted with a cursor), IN REVIEW, and DONE. Other visible fields include 'View workflow', 'Priority' (High), and 'Assignee' (yan Lee, to me, dmin).

NOTE: You can't edit every field. The Issue Key field stays the same so that you always have a unique way of identifying each issue. The Created and Updated fields are automatically generated based on when you created the issue or last updated it, so you can't edit them.

Attach related files to issues

- You can provide more context on your issues by attaching files. Jira enables you to attach many file types to issues, including PNG, JPG, ZIP, XML, and more.
- 👉 For example: You can take a screenshot of a bug in your product and paste it in the Description of the related Bug issue. That way, teammates looking at the issue can easily understand what the bug is.
- 👉 You can attach a file using the Attach button or by pasting it into the Description field.



All attachments on an issue will appear in the Attachments section.

View an issue's history

- If you want to know how an issue has changed over time, you can go to the History tab. The **History tab** shows all of the changes on an issue and which user made them.
- 🤝 For example: If you think an issue has a different due date than it used to, you can check in the History tab. It'll show you if the Due Date field changed, when it did, and who changed it. Then, you can ask that coworker any follow-up questions!

Let's try on Jira!

Linking issues

What if you want to show that one issue is dependent on another?

- In Jira Software, you can **link** issues that relate to one another and define that relationship. Linking enables you to:
 - show relationships between **issues** and navigate to them
 - navigate to related **Confluence pages** from the issue
 - navigate to other related **web resources** from the issue

Let's link issues using the dropdown in the issue detail view.

What relationship can you show between issues?

- When linking two issues, there are many different relationships you can choose from. Some common issue link types are:
 - Relates to
 - Depends on / is depended on by
 - Blocks / is blocked by
 - Clones / is cloned by (this link is automatically created for cloned issues)

Your linked issues will appear in a section below the description, showing the relationship, issue key, summary, assignee, and more.

Moving issues

What if your issue has the wrong issue type? Or is in the wrong project?

You can **move** issues to change their location and relationship to other issues. There are **three ways** you can move an issue in Jira Software.

1. MOVE ISSUE TYPES

You can change the issue type of an issue. For example, you may decide you want to reorganize your work items by changing a Story to an Epic.

2. MOVE SUB TYPES

You can move a sub-task to another parent issue.

3. MOVE TO ANOTHER PROJECT

You can move an issue from **one project to another**. You can also change its issue type at the same time. This can be helpful if the project you're moving to doesn't use the same issue types.

How do you move an issue?

To move an issue in any of these ways:

1. Click to open the issue.
2. Click the more actions (•••) menu.
3. Click Move.
4. Select what kind of move you'd like to make: to a new project, to a new issue type, or to a new parent issue.
5. Click Next, fill out any information requested, then click Confirm to move the issue

Depending on what kind of move you're doing, you may be asked to fill out required fields, or certain fields might not move with an issue.

👉 For example, if you change an issue's type from Bug to Story, the Story issue type might not have all the same fields as the Bug issue type.

Deleting issues

You can delete issues in Jira Software, but be careful.

If you find you don't need an issue anymore, you can delete it. But, if you delete an issue, you can't undo or recover it.

When you delete an issue, you delete all attachments, comments, history, links, and subtasks for that issue. Also, that issue's Issue Key won't be reused.

To delete an issue:

- Click to open the issue.
- Click the more actions (•••) menu.
- Click Delete.

You can delete an issue from its issue detail view.

NOTE: You need permission to complete most actions in Jira Software, including editing, attaching files to, linking, moving, and deleting issues. If you want to take one of these actions but can't, check with your project manager.

QUIZ

Which of these is NOT included in the Move action?

- A. Changing an issue's issue type
 - B. Moving an issue to another project
 - C. Moving an issue from one status to another
 - D. Moving a subtask under a new parent issue
-

QUIZ ANSWER

Which of these is NOT included in the Move action?

- A. Changing an issue's issue type
- B. Moving an issue to another project
- C. Moving an issue from one status to another**
- D. Moving a subtask under a new parent issue

[You can move an issue from one status to another, but this is often called transitioning an issue. You do this by dragging it to a different column on a board or selecting a new status from an issue's Status dropdown menu. You cannot do this with the Move action.]

The Move action, accessed from the more actions menu on an issue, includes moving an issue to another project, changing an issue's issue type, or moving a subtask under a new parent issue.]

QUIZ

Joy just deleted an issue. Which of these statements is true?

- A. Joy can recover the deleted issue.
 - B. The deleted issue's Issue Key will be reused.
 - C. The deleted issue's subtasks will move to another issue.
 - D. The deleted issue's attachments will also be deleted.
-

QUIZ ANSWER

Joy just deleted an issue. Which of these statements is true?

- A. Joy can recover the deleted issue.
- B. The deleted issue's Issue Key will be reused.
- C. The deleted issue's subtasks will move to another issue.
- D. The deleted issue's attachments will also be deleted.**

[When you delete an issue, its attachments will also be deleted.]

You can't recover a deleted issue or reuse its Issue Key. Also, any subtasks for that issue will also be deleted.]

4. Collaborating on issues in Jira Software

By the end of this lesson, you'll be able to:

- Add comments to issues and mention team members
 - Share issues with team members
 - Watch issues to stay up to date
-

Adding comments

Comments should be your go-to issue field.

They provide the best way to ask questions and share updates. You can also:

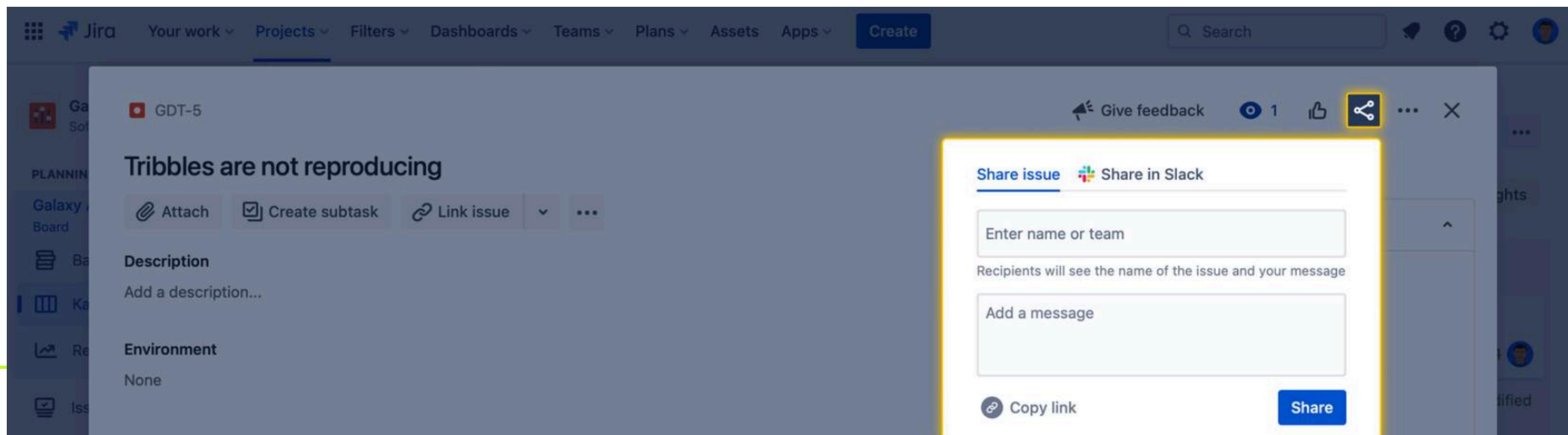
- **mention** teammates by @-ing them to bring attention to important info
- add an **issue key** in a comment to provide a link to another issue
- add **images** in comments for more information
- **get a link** to a specific comment to share elsewhere
- **sort** comments in ascending or descending order
- **add reactions** to comments with popular emojis like  or 

NOTE: Depending on how a project is set up, you may not be able to add, edit, or delete comments. Other users may not be able to comment on your issues. Check with your project manager to see how you should use comments.

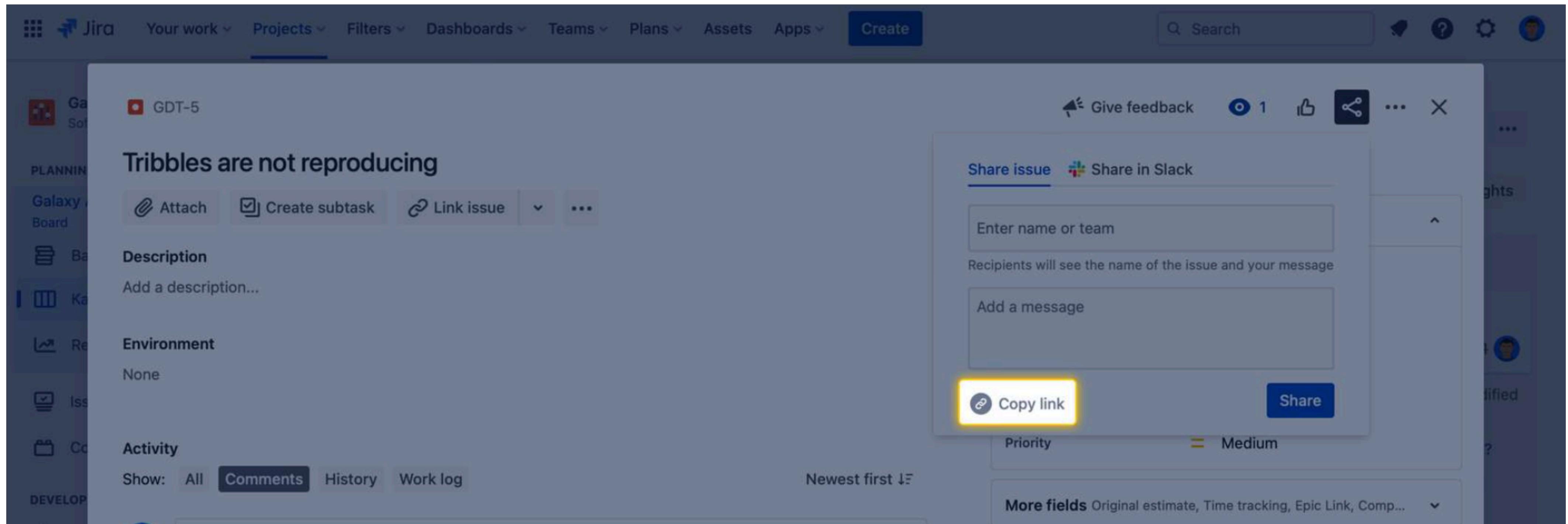
Sharing issues

Keep stakeholders in the loop by sharing issues.

- If you need to bring attention to an issue outside of Jira, you can share it. This sends an email with a link to the issue to the one or more email addresses you enter. You can also add a message.
-  To share an issue, open it and click the share icon in the upper-right corner.



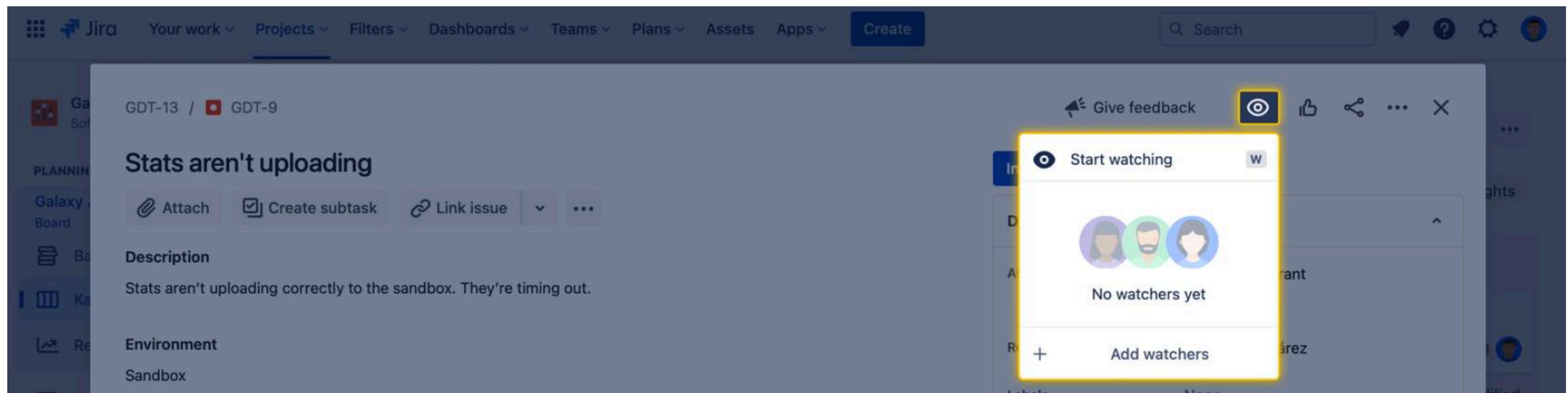
- If you just want to get a link to an issue, you can click **Copy link** in the share menu. This copies a direct link to the issue that you can paste elsewhere.



NOTE: Jira sends automatic notifications about issues. Notifications about shared issues are sent in addition to these.

Watching issues

- Stay in the loop by enabling 'Watch your issues.'
- With this setting, you automatically become a **watcher** of any issue you interact with. This means you will receive notifications any time there is an update to the issue.
-  You can also watch an individual issue by clicking the eye icon.



Why is this helpful?

- It helps you keep track of your work, always. In Jira, you'll often work on issues where someone else is the assignee, but you're a contributor. You still need to know about updates and changes to the issue.
- By enabling 'Watch your issues,' you'll automatically stay in the loop with email notifications. You can also access these through the notifications bell icon in Jira.

Let's try to enable 'Watch your issues.'

NOTE: If the emails get overwhelming, remember you can always un-watch an issue to stop receiving the messages. To stop watching an issue, click the eye icon in the issue detail view and select 'Stop watching.'

QUIZ

Aaron is working on an issue and needs to ask a teammate a question. What is the best way to accomplish this in Jira?

- A. Type your question into the Description field in the issue
- B. Use the People dropdown and select your teammate
- C. Comment on the issue and mention the teammate
- D. Create a new issue to ask your teammate the question

QUIZ ANSWER

Aaron is working on an issue and needs to ask a teammate a question. What is the best way to accomplish this in Jira?

- A. Type your question into the Description field in the issue
- B. Use the People dropdown and select your teammate
- C. Comment on the issue and mention the teammate**
- D. Create a new issue to ask your teammate the question

[Comments and mentions are the best way to communicate and keep work in one place.]

The Description field isn't used for teammate communications. The 'People' dropdown will let you see your teammates, but won't allow you to communicate with them. Issues should represent work items, not questions about other work items.]

QUIZ

True or false: If you enable the 'Watch your issues' setting, you can still stop watching individual issues.

- A. True
 - B. False
-

QUIZ ANSWER

True or false: If you enable the 'Watch your issues' setting, you can still stop watching individual issues.

A. True

B. False

[This is true: you can always stop watching an issue by clicking the eye icon in the issue detail view.]

ASSIGNMENT 2

Jira Software Issue Management Exploration

SECTION 3

Jira Best Practices for Beginners

Discover expert tips to help you get the most out of Jira. Learn how to optimise your settings and make your work more efficient and effective. This section will cover:

- 1. Building your daily Jira habit**
 - 2. Issue best practices in Jira Software**
 - 3. Creating basic dashboards in Jira Software**
 - 4. Working efficiently using commands and shortcuts in Jira Software**
 - 5. Updating your personal settings in Jira Software**
-

1. Building your daily Jira habit

What's the biggest difference between pro and novice Jira Software users?

ANSWER: how often they use the tool.

- Novice users aren't consistent. They rarely check Jira. They don't keep issues up-to-date. This inconsistency creates confusion and frustration among teammates.
- Pro users make Jira part of their daily routine. They have a habit of checking and updating Jira continuously each day. These pros realize using Jira consistently helps them be better at their jobs: more productive, more organized, more collaborative, and a higher-performing teammate, overall.
- You, too, can build a daily Jira habit and become a productivity pro. Add Jira to your daily routine and you'll quickly see the benefits.

Be the Jira Software champion on your team

- Remember, Jira works best if your entire team uses it every day. With your new Jira skills, you can be your team's productivity advocate and get everyone on board.
 - Try using Jira to document all team-related questions and activities.
-

Optimize Jira Software for you

- You'll use Jira more often if it's set up exactly how you'd like. As a flexible tool, Jira has a variety of features for you to customize. You can adjust personal settings, set notification frequency, create custom work views, connect Jira to other tools, and much more.
 - To change your settings, click the Settings icon, then go to Personal Jira settings.
-

2. Issue best practices in Jira Software

By the end of this lesson, you'll be able to:

- Find issues using the search bar
 - Use helpful Jira features to improve collaboration
-

You'll probably spend a lot of time with issues.

Creating, updating, managing

- While there are no set rules around issues, there are a few simple strategies that can make your life easier. We've compiled a list of issue best practices that most Jira users can benefit from.

1. Search for issues you can't find

Use the search bar to find issues quickly. The search bar is located near the top right of the main navigation bar. Here are some tips for using it:

- Click in the search box to **see recent work**. Before typing a single word, the search bar populates a list of recent issues, boards, projects, and filters.
- Let Jira **guess your search**. As you type, Jira tries to guess what you're searching for. Watch your screen for instant search results, even before you've finished typing.
- Can't remember the issue name? Search for **any related word**. Jira will scan other fields like descriptions and comments to find your issue.

Let's try the search bar in action

2. Star important boards, projects, and filters

- You'll use certain boards, dashboards, projects, and search filters more often than others. You can **star** them to find them easily and see them first in different parts of Jira Software, like the search bar and the Your Work, Projects, and Dashboards dropdown menus.
- To star an item, locate it in Jira, then click the **star** icon. It'll appear in different places, but it's the same star throughout Jira Software.

NOTE: You can reorder your starred items by going to Your work page, clicking the Starred tab, and dragging and dropping your starred items.

Let's try to star a dashboard on the board itself or in the Dashboards menu.

3. Vote on issues

You can vote on issues to show that you think an issue is important. Your team can then use votes to make decisions on which work to complete and in which order.

You can search for issues with votes to easily compare them. If you change your mind, you can remove your vote.

You can't vote on issues:

- that you've already voted for
- that are resolved

Let's try, to vote on an issue, open the issue detail view and click the vote icon in the top right.

4. Track the time it takes you to work on issues

- Jira Software enables you to track the time you spend working on each issue using time tracking. Click the Time tracking field on an issue to open this menu.

Let's try to explore time tracking on an issue.

5. Pin fields that you use frequently

- You can **pin** fields that you use frequently. This is especially helpful if your team requires you to fill out a certain set of fields for every issue, like Assignee and Due Date.
- To pin a field, hover over the field's name in the right sidebar. When a pin icon appears, click it.

QUIZ

Nifemi wants to vote on an issue but can't. What might be preventing him from voting?

- A. You can't vote on bug issues in Jira Software.
 - B. You can't vote on issues that are in progress.
 - C. You can't vote on issues you created.
 - D. You can't vote on issues in the backlog.
-

QUIZ ANSWER

Nifemi wants to vote on an issue but can't. What might be preventing him from voting?

- A. You can't vote on bug issues in Jira Software.
- B. You can't vote on issues that are in progress.
- C. You can't vote on issues you created.
- D. You can't vote on issues in the backlog.

[This is true: you can always stop watching an issue by clicking the eye icon in the issue detail view.]

QUIZ

Kelly wants to see all of her starred item in Jira Software. Where can she look?

- A. From the more actions menu on her project board
- B. On the Your Work page's Starred tab
- C. In her sprint report's Starred section
- D. At the top of the backlog

QUIZ ANSWER

Kelly wants to see all of her starred item in Jira Software. Where can she look?

- A. From the more actions menu on her project board
- B. On the Your Work page's Starred tab**
- C. In her sprint report's Starred section
- D. At the top of the backlog

[The quickest way to see a list of your starred items is going to the Your Work page and clicking the Starred tab. The other methods won't show all or any of your starred items.]

3. Creating basic dashboards in Jira Software

By the end of this lesson, you'll be able to:

- Use dashboards to gain insight into your team's work
- Create simple dashboards

How do you see everything you need to know in Jira Software?

Use dashboards to keep track of what you need.

- A **dashboard** is a customized screen to give you a high-level snapshot of everything happening in Jira. Dashboards are made up of small, configurable blocks called **gadgets**.
- Your default dashboard may have gadgets like **Introduction**, **Projects**, **Assigned to Me**, and **Activity Stream**. Any gadget can be edited or deleted. The overall dashboard layout is entirely customizable.
- You can create multiple dashboards for different projects, or one single dashboard that spans all the work you're involved with.
- **EXAMPLE ON NEXT PAGE**

example of a Jira dashboard with four gadgets

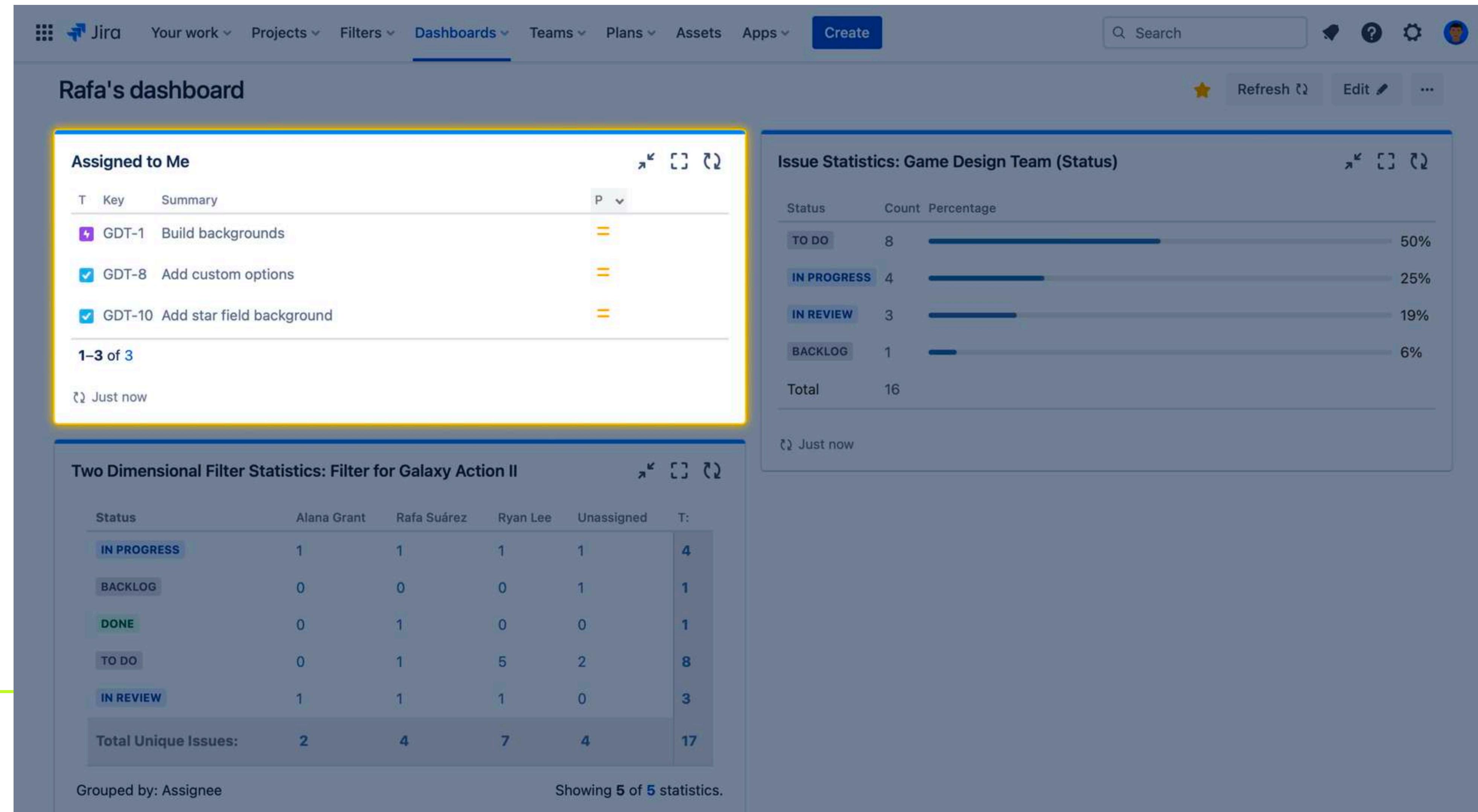
The screenshot shows a Jira dashboard titled "Default dashboard". The dashboard is divided into four main sections (gadgets):

- Introduction:** Displays a "Welcome to Jira" message with a small illustration of two people looking at a screen, and a link to the "Jira User's Guide".
- Assigned to Me:** Shows a list of items assigned to the user, with one item visible: "GD-1 Stats are not displaying above avatar".
- Projects:** Lists various Jira projects, each with a small icon, the project name, and the lead developer. Projects include: Airplane Shuttles (AS), Astronaut App (AA), Bug Tracking (BT), Deep Space (DS), First service desk project (FSDP), Game Design Team (GD), Marketing (MAR), Space Engineering (SE), Tools (TOOL), and Astronaut App (AA) (repeated). The lead developer for most projects is Max Taylor, except for Marketing (MAR) which is djones.
- Activity Stream:** Shows a history of activity from a user named Reagan Hicks, including changing status to Done, updating rank, and starting progress on tasks like "Finalize spacecraft designs" and "Build new homepage".

Different users may see different information on a dashboard, depending on what they have permission to see in Jira Software.

What are some useful gadgets?

1. ASSIGNED TO ME - The Assigned to Me gadget shows all unresolved issues assigned to you.



The screenshot shows a Jira dashboard titled "Rafa's dashboard" with three gadgets:

- Assigned to Me**: A table showing issues assigned to the user. The table has columns for Key and Summary. The data is as follows:

Key	Summary
GDT-1	Build backgrounds
GDT-8	Add custom options
GDT-10	Add star field background

1-3 of 3

Just now

- Issue Statistics: Game Design Team (Status)**: A chart showing the count and percentage of issues by status. The data is as follows:

Status	Count	Percentage
TO DO	8	50%
IN PROGRESS	4	25%
IN REVIEW	3	19%
BACKLOG	1	6%
Total	16	

Just now

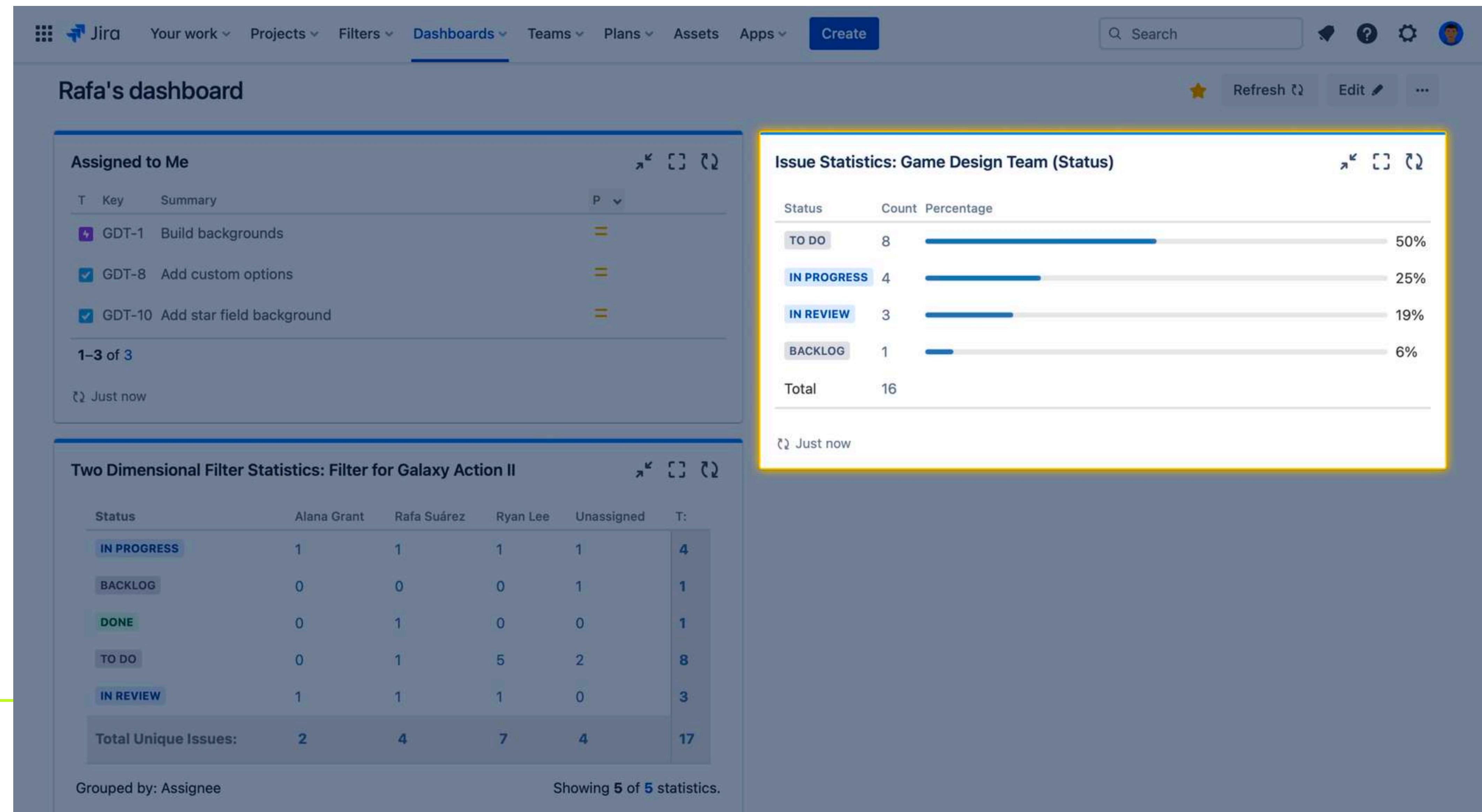
- Two Dimensional Filter Statistics: Filter for Galaxy Action II**: A table showing the count of issues for different status and assignee combinations. The data is as follows:

Status	Alana Grant	Rafa Suárez	Ryan Lee	Unassigned	T:
IN PROGRESS	1	1	1	1	4
BACKLOG	0	0	0	1	1
DONE	0	1	0	0	1
TO DO	0	1	5	2	8
IN REVIEW	1	1	1	0	3
Total Unique Issues:	2	4	7	4	17

Grouped by: Assignee

Showing 5 of 5 statistics.

2. ISSUE STATISTICS - The Issue statistics gadget shows one characteristic about issues, like how many of your project's issues are in each status.



The screenshot shows a Jira dashboard titled "Rafa's dashboard". The dashboard features several gadgets. The "Issue Statistics" gadget, highlighted with a yellow border, displays the status distribution of issues for the "Game Design Team". The data is presented in a table with a horizontal bar chart for each status.

Status	Count	Percentage
TO DO	8	50%
IN PROGRESS	4	25%
IN REVIEW	3	19%
BACKLOG	1	6%
Total	16	

Below the statistics, a note says "Just now".

Other visible gadgets include "Assigned to Me" (listing three issues: GDT-1, GDT-8, GDT-10) and "Two Dimensional Filter Statistics: Filter for Galaxy Action II" (a grid showing issue counts by status and assignee).

3. TWO-DIMENSIONAL FILTER STATISTICS - The Two-dimensional filter statistics gadget is very similar to the Issue statistics gadget, but it uses a filter to show two characteristics about your project's issues. For example, you can use this gadget to show the status of all issues by Assignee.

The screenshot shows a Jira dashboard titled "Rafa's dashboard". The top navigation bar includes links for Jira, Your work, Projects, Filters, Dashboards, Teams, Plans, Assets, Apps, and a Create button. The search bar is empty. The dashboard features three main gadgets:

- Assigned to Me**: A list of issues assigned to the user. It shows three issues: GDT-1 (Build backgrounds), GDT-8 (Add custom options), and GDT-10 (Add star field background). The status for GDT-1 is "IN PROGRESS".
- Issue Statistics: Game Design Team (Status)**: A chart showing the count and percentage of issues by status. The data is as follows:

Status	Count	Percentage
TO DO	8	50%
IN PROGRESS	4	25%
IN REVIEW	3	19%
BACKLOG	1	6%
Total	16	

- Two Dimensional Filter Statistics: Filter for Galaxy Action II**: A table showing the count of issues for each assignee by status. The data is as follows:

Status	Alana Grant	Rafa Suárez	Ryan Lee	Unassigned	T:
IN PROGRESS	1	1	1	1	4
BACKLOG	0	0	0	1	1
DONE	0	1	0	0	1
TO DO	0	1	5	2	8
IN REVIEW	1	1	1	0	3
Total Unique Issues:	2	4	7	4	17

At the bottom of the dashboard, it says "Grouped by: Assignee" and "Showing 5 of 5 statistics." The "Two Dimensional Filter Statistics" gadget is highlighted with a yellow border.

EXERCISE

Setting up a dashboard

1. Create a new dashboard

On the main navigation bar, select **Dashboards**, then **Create dashboard**. Give your dashboard a name and description and select **Save**.

2. Add your gadgets

At the top right of your window, select **Add gadget**. Scroll through the available gadgets, choose one with helpful information, and select **Add gadget**. Repeat this until you've selected all of the gadgets you want.

3. Organize your gadgets and test your dashboard

You can organize your gadgets by dragging and dropping them where you wish. If you find a gadget that isn't useful, delete it and add a new one.

Many gadgets require you to set up filters before they can be used properly. Every new dashboard is only visible to you, so feel free to explore.

QUIZ

Eun-mi wants to add a gadget to her dashboard that shows how many issues are in each epic she's working on and what status they're in. Which gadget can help her do this?

- A. Assigned to Me
- B. Issue statistics
- C. Two-dimensional filter statistics

QUIZ ANSWER

Eun-mi wants to add a gadget to her dashboard that shows how many issues are in each epic she's working on and what status they're in. Which gadget can help her do this?

- A. Assigned to Me
- B. Issue statistics
- C. Two-dimensional filter statistics**

[The Two-dimensional filter statistics gadget can show you two characteristics about issues. In this case, Eun-mi wants to show (1.) the number of issues in each epic and (2.) the status they're in.]

The Issue statistics gadget wouldn't be able to show this level of detail, and the Assigned to Me gadget simply lists the issues assigned to Eun-mi without further detail.]

QUIZ

True or false: Different users may see different information on a dashboard, depending on their permission.

- A. True
- B. False

QUIZ ANSWER

True or false: Different users may see different information on a dashboard, depending on their permission.

A. True

B. False

[This is true; what users see on a dashboard will depend on the permissions they have in Jira Software.]

4. Working efficiently using commands and shortcuts in Jira Software

By the end of this lesson, you'll be able to:

- Use keyboard shortcuts to work quickly in Jira Software
- Use the Jira command palette to navigate, search, and work with just your keyboard

Want to move quickly in Jira Software?

Keyboard shortcuts can help with that.

Jira Software has many keyboard shortcuts that help you quickly open menus, take actions, and navigate your boards and projects.

Let's try: To see a list of all shortcuts in Jira Software, just press ? on your keyboard or click Help, then Keyboard shortcuts.

NOTE: You can disable keyboard shortcuts with a toggle in the upper-right of the Keyboard shortcuts dialog.

There are different groups of shortcuts for different actions

1. GLOBAL SHORT

These shortcuts can be used when you are in any part of Jira:

- Quick search: /
- Create issue: c
- Toggle sidebar: [
- Open help panel: h=

2. NAVIGATING ISSUES

Use these shortcuts to navigate through issues:

View selected issue: o

Next issue: j

Previous issue: k

Toggle issue fullscreen: z

Search for issues: u

3. ISSUE ACTIONS

This section has shortcuts for working with issues, including:

Assign issue: a

Comment on issue: m

Actions menu: .

Assign to me: i

Change status: d

4. BOARD ACTIONS

These shortcuts help you quickly move around boards:

Backlog: 1

Active sprints/Kanban board: 2

Reports: 3

**NOTE: Remember, if you ever need to see a list of
shortcuts, press ? (Shift + /) to pull up a full list. Shortcuts for other
products that work with Jira Software may appear, too.**

Want to take it to the next level?

Use the command palette to work in Jira with only your keyboard.

The **command palette** enables you to move through Jira Software and accomplish tasks with only your keyboard—without your mouse or trackpad.

To use the command palette:

1. Press Command + K on a Mac or Ctrl + K on Windows.
2. Start typing in the search bar to search for any command, or use the arrow keys to locate a command.
3. Press Return or Enter to select that command or go to that item

Let's try, open the command palette and lets see what it looks like!

Once you open the command palette, there are several things you can do.

- **Search in Jira** - You can press / to search for issues, projects, boards, filters, and more in Jira.
- **Project navigation** - If you're currently in a project, like viewing a board or an issue, there are project navigation actions available. You can move to the backlog, board, reports, or timeline, or see the project's issues.
- **Issue actions** - If you're currently viewing an issue, there are many commands you can use to interact with that issue, including assigning it, editing the description, adding comments and attachments, cloning it, watching it, logging work, and more.
- **Atlassian admin** - This section only appears for site admins. You can access user management and billing details if you have the appropriate permissions.
- **Jira admin** - This section only appears for Jira admins. You can go to settings pages for the system, product, projects, issues, and apps if you have the appropriate permissions.
- **Quick actions** - These commands enable you to quickly create an issue, search on the current page, copy the current page's URL, or open your notifications panel.

- **Site navigation** - These commands help you move around your Jira Software site, viewing all items of a specific type, including issues, projects, boards, dashboards, and more.
- **Personal settings** - The personal settings commands enable you to switch your theme to light or dark as well as open your personal or account settings.
- **Help** - You can also use commands to open the Help panel or view keyboard shortcuts.

NOTE: If it seems like you're editing or typing in a field, the command palette won't open. Check if you have a field or text editor selected before opening the command palette.

QUIZ

Match the shortcut key to its action.

≡ 1

Backlog

≡ c

Assign to me

≡ i

Create issue

≡ m

Comment on issue

QUIZ ANSWER

- ≡ 1 → Backlog
- ≡ i → Assign to me
- ≡ c → Create issue
- ≡ m → Comment on issue

QUIZ

True or false? Devon wants to find an issue he isn't assigned to, assign it to himself, then log several hours of work on the issue. Assuming he has permission to do all of these actions, he can use the command palette to do so.

- A. True
 - B. False
-

QUIZ ANSWER

True or false? Devon wants to find an issue he isn't assigned to, assign it to himself, then log several hours of work on the issue. Assuming he has permission to do all of these actions, he can use the command palette to do so.

- A. True**
- B. False**

[This is true. You can find issues, go to issues, assign issues, and log work on an issue all in the command palette.]

QUIZ

Which sections of the command palette only appear for users with the correct permissions? (Select all that apply.)

- A. Project navigation
- B. Site navigation
- C. Atlassian admin
- D. Jira admin

QUIZ ANSWER

Which sections of the command palette only appear for users with the correct permissions? (Select all that apply.)

- A. Project navigation
- B. Site navigation
- C. Atlassian admin**
- D. Jira admin**

[You need to be an admin for your organization to see the Atlassian admin section. Likewise, you need to be a Jira admin to see the Jira admin section.]

5. Updating your personal settings in Jira Software

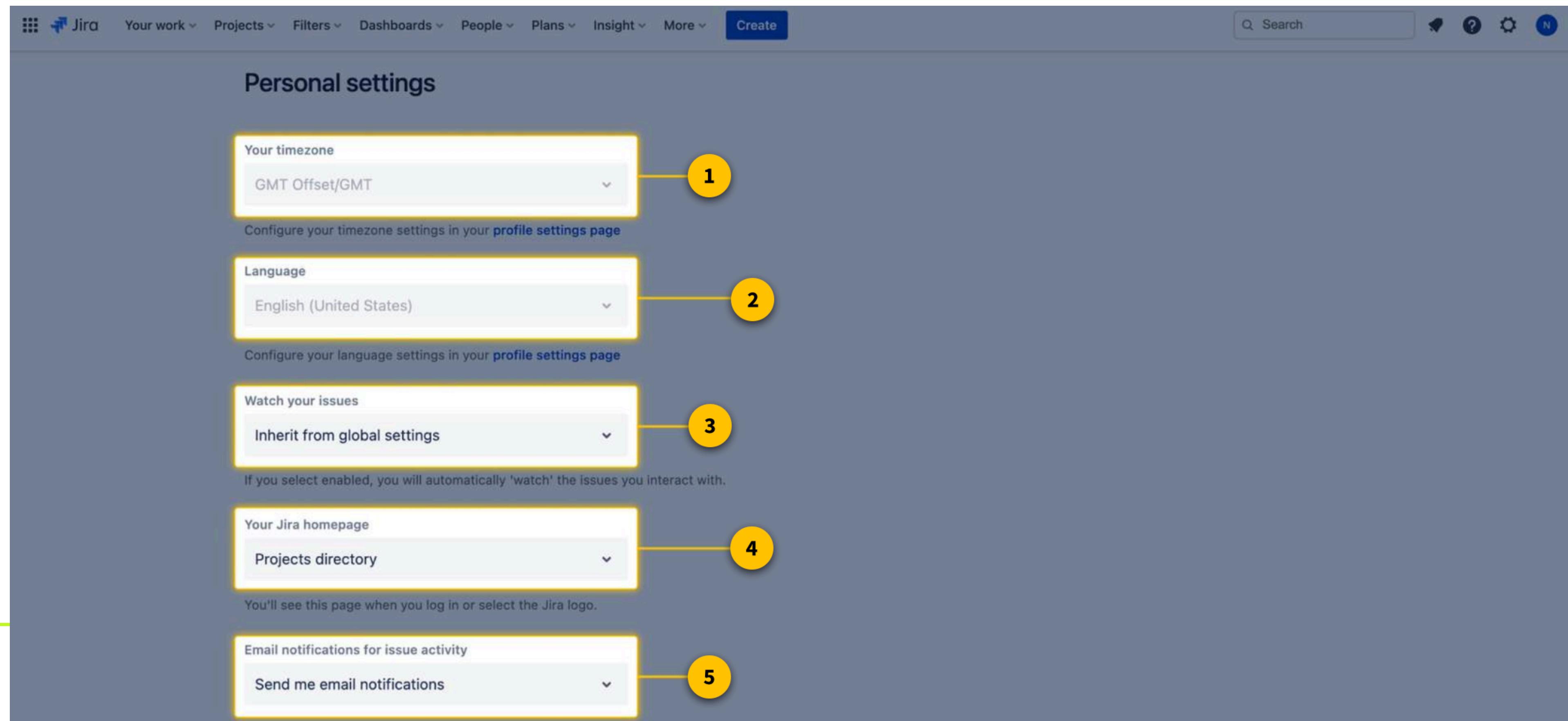
By the end of this lesson, you'll be able to:

- Configure your personal settings in Jira Software
 - Change your theme in Jira Software
-

Personalizing your settings

Let's make Jira Software work best for you.

Jira is a flexible tool, allowing for a variety of customizations. While your Jira admin or team leader will set up many customizations, there are a few important settings you can control.



The screenshot shows the 'Personal settings' page in Jira. The page has a dark blue header with the Jira logo and a navigation bar. Below the header, there are five settings sections, each with a yellow callout number:

- 1** Your timezone: A dropdown menu set to "GMT Offset/GMT".
- 2** Language: A dropdown menu set to "English (United States)".
- 3** Watch your issues: A dropdown menu set to "Inherit from global settings".
- 4** Your Jira homepage: A dropdown menu set to "Projects directory".
- 5** Email notifications for issue activity: A dropdown menu set to "Send me email notifications".

Each setting section includes a link to "profile settings page" and a descriptive note below the dropdown.

← **Let's try!**

What did we just do?

- Your timezone: Set your date and timezone preferences.
- Language: Change your preferred language.
- Watch your issues: Automatically become a watcher of any issue that you create or comment on.
- Your Jira homepage: Choose your preferred homepage. When you click on the Jira logo in the top left, it will take you to your selected page.
- Email notification preferences: Choose how and when you receive email notification.

Set the Jira homepage to show your work

- Your default homepage may be set to the Project directory. While this can be helpful at times, most users prefer to see the work assigned to them. To do this, set your homepage to Your work.
- 🤝 Why is this helpful? It helps you find your work quickly and effortlessly. The Your work screen shows items you've recently worked on or viewed. Recent projects, boards, and issues can all be found with a few clicks. Change the homepage to Your work, and you'll never be too far from your most important projects and tasks.

Let's try!

Want to change your personal settings?

To access your personal settings:

1. Select your **profile icon** at the top right.
2. Select **Personal settings**.
3. Update your preferences and select **Save changes**.

Let's try!

Do you prefer dark mode?

Change your theme to dark or light.

- In Jira Software, you can change the theme from your profile menu, the same menu where you access your personal settings.
- You have three options: Light (the default), Dark, or Match browser, which will follow your browser's theme.

Let's try: change your theme, click your profile icon, then select Theme.

QUIZ

True or false? Once you configure your personal settings, you can't change them.

- A. True
 - B. False
-

QUIZ ANSWER

True or false? Once you configure your personal settings, you can't change them.

A. True

B. False

[In Jira Software, you can change your personal settings whenever you need to. You can update your timezone if you change locations, your email preferences if you want fewer notifications, and more.]

Fin!