



JIRA FOUNDATIONS
PARTICIPANT GUIDE
IT INITIAL

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JIRA FOUNDATIONS PARTICIPANT GUIDE

OVERVIEW

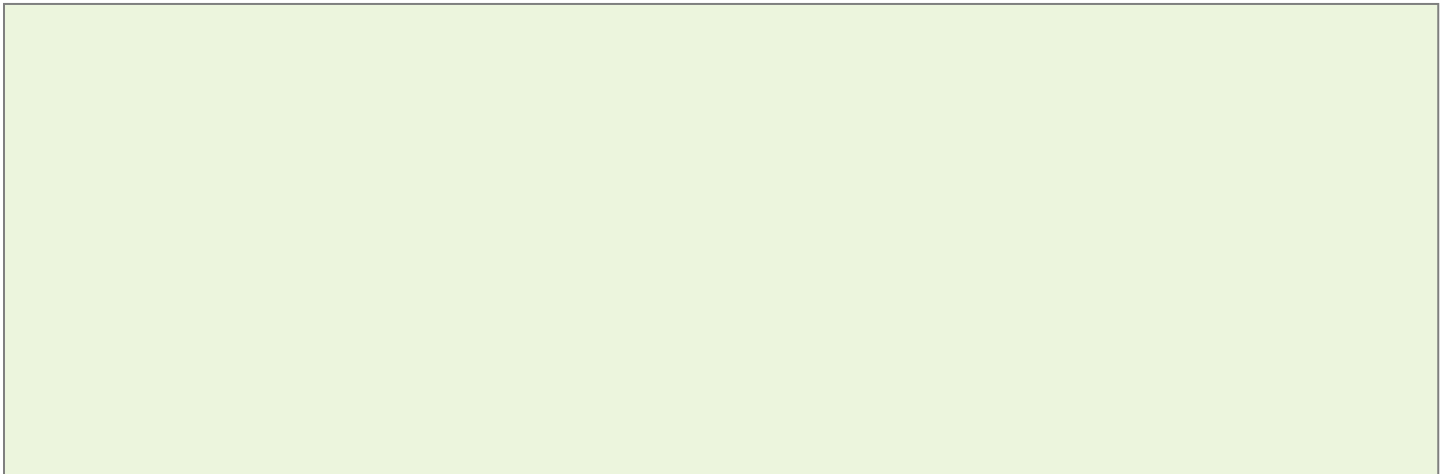
Jira is a work tracking tool that supports visibility into our IT projects and products. Teams use Jira to prioritize their backlog, track their work in progress, collaborate on work items, generate reports, and so much more!

As IT team members at UWM, it's important to know how to perform the most basic functions in Jira so that you can hit the ground running when you join your new team.

This guide will outline how to complete the most common actions you will perform in Jira, as well as provide you a place to take notes.

WHAT IS JIRA?

Jira is a work tracking tool that supports visibility into our IT projects and products.



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OUTCOME

- Navigate Jira to create an issue and transition it on an Active Sprint board

MAIN NAVIGATION BAR

After logging in, the main navigation bar provides 8 dropdowns and 1 button for quick actions within the tool. See below to take notes on the 6 dropdowns you'll use the most.



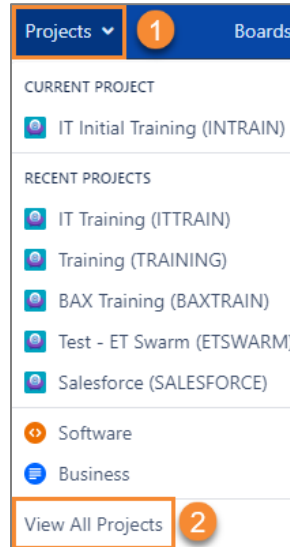
Dropdown/Button	Description
1. Dashboards	
2. Projects	
3. Issues	
4. Boards	
5. Tests	
6. Create	

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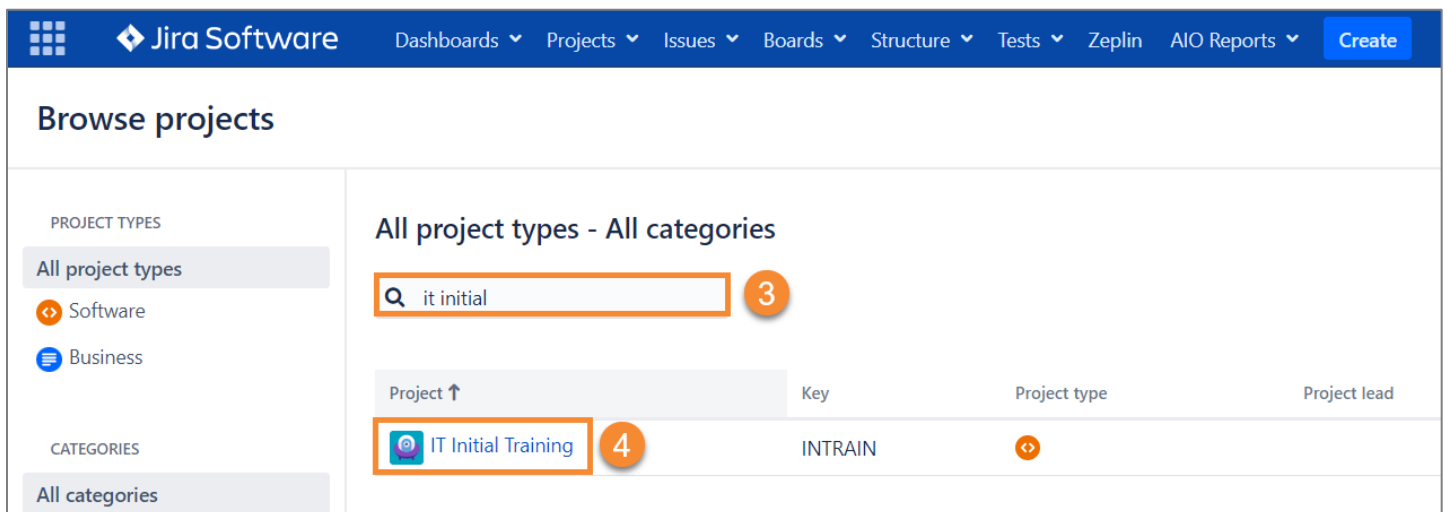
PROJECT

A project is the space where a team works. It's the space where you'll find your team's Epics, Stories, and Tasks to work on. To locate a project space, do the following:

1. Click on the Projects dropdown in the main navigation bar
2. Click "View All Projects"

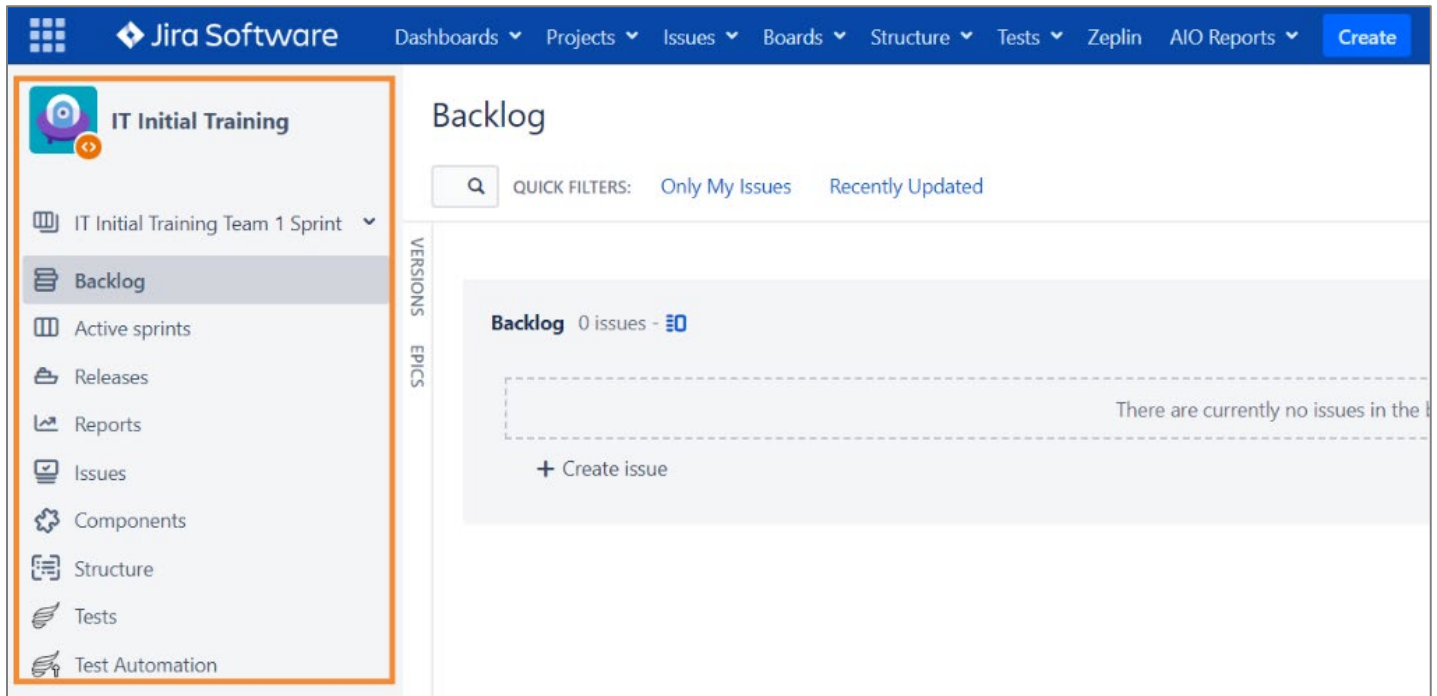


3. In the search field, type in the name of the project you're searching for [IT Initial]
4. Click on the project to be routed to the project space



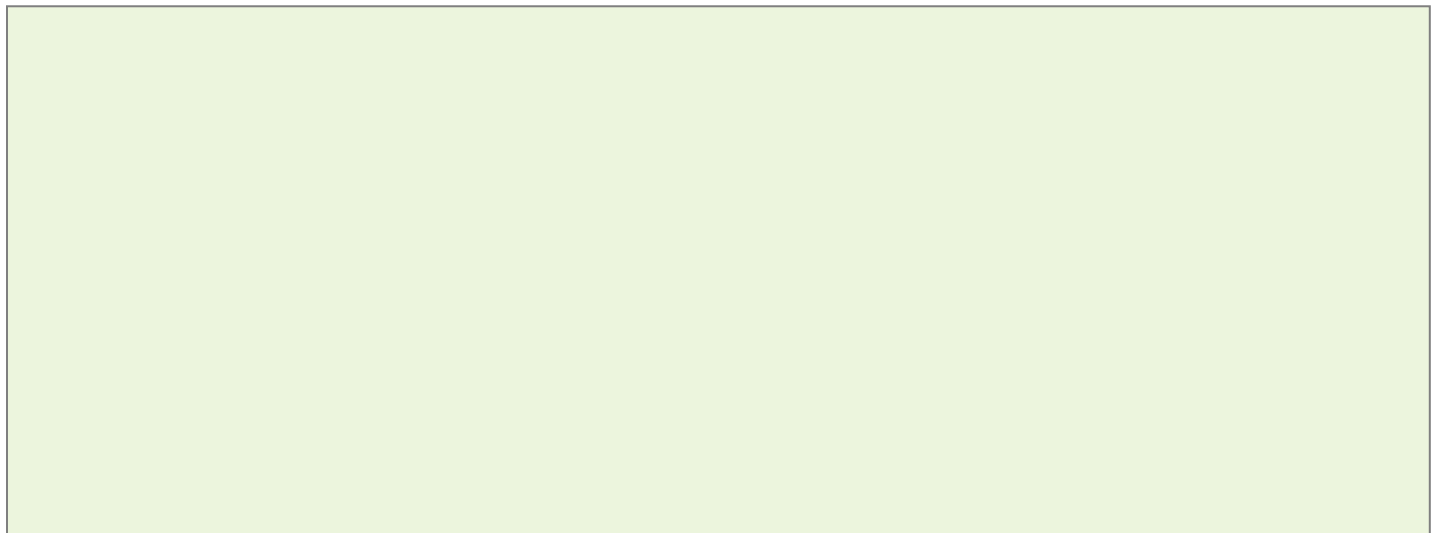
PROJECT SIDEBAR

The project sidebar is a collapsible navigation bar that shows you options specific to the project you're viewing.



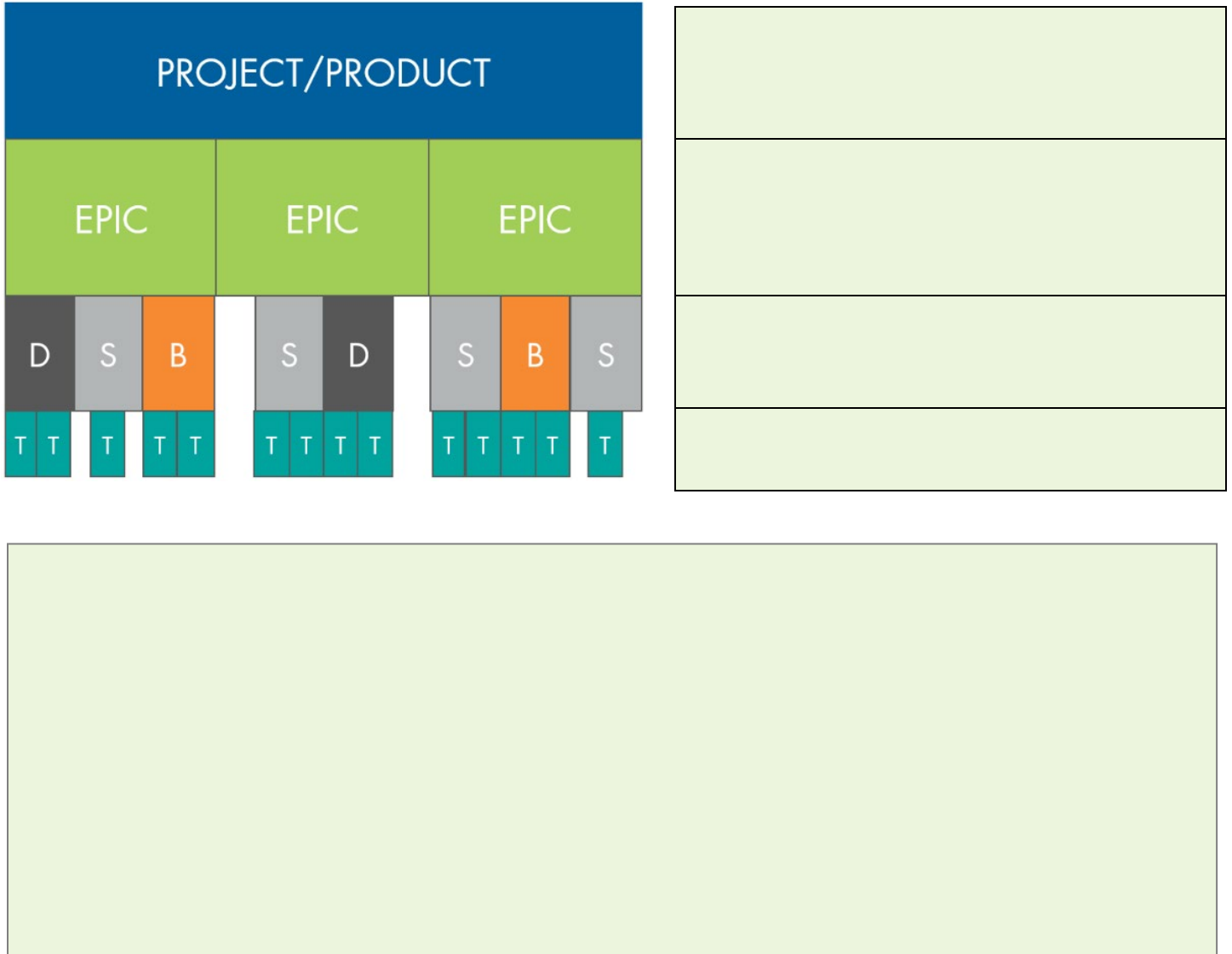
The screenshot displays the Jira Software interface. At the top is a navigation bar with links for Dashboards, Projects, Issues, Boards, Structure, Tests, Zeplin, AIO Reports, and a Create button. Below this, the Project Sidebar for 'IT Initial Training' is shown, containing a list of navigation items: IT Initial Training Team 1 Sprint, Backlog (highlighted), Active sprints, Releases, Reports, Issues, Components, Structure, Tests, and Test Automation. The main content area is titled 'Backlog' and shows '0 issues'. A message states 'There are currently no issues in the backlog' with a '+ Create issue' button below it.

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SDLC BACKLOG STRUCTURE

A Software Development Lifecycle (SDLC) backlog consists of an overarching Project or Product with work items below it called Issues. In Jira, Issues are Epics, Stories, Defects, Bugs, and Tasks.

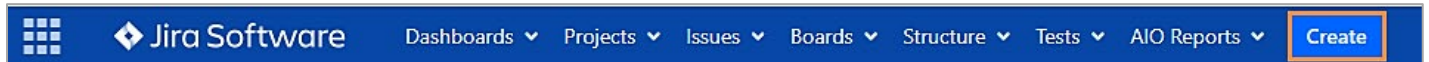


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CREATING AN ISSUE

In Jira, Issues are the building blocks of a project. They are the work items tracked from creation to completion. Follow the steps below to create an Issue in Jira.

1. Click the Create button at the top of the main navigation bar



2. A "Create Issue" window will appear. Fill in all required fields as shown below:
 - A. Project: Click the dropdown to select the Project the Issue relates to
 - B. Issue Type: Click the dropdown to select the Issue you'd like to create (Epic, Story, Bug, etc.)

The screenshot shows the 'Create Issue' form in Jira. The form has a title 'Create Issue' and a 'Configure Fields' button. Below the title, it states 'All fields marked with an asterisk (*) are required'. The 'Project*' dropdown is set to 'IT Initial Training (ITINTRAIN)'. The 'Issue Type*' dropdown is open, showing a list of options: Defect, Test, UX Work Item, Work Request, Story, Bug, DEA Work Item, General Item, Version, and Tech Debt. The 'Field Tab*' is set to 'Prioritiza'. The 'Summary' field is empty. The 'Epic Name' field is empty. The 'Parent Link' dropdown is set to 'General Item'. The 'Component/s' field is empty. The 'Assignee' dropdown is set to 'Automatic'. The 'Product Owner' dropdown is empty. The 'Description' field has a rich text editor with various formatting options. At the bottom right, there are buttons for 'Create another', 'Create', and 'Cancel'.

ISSUE TYPES

Issue Type	Description
Defect	Problem which impairs or prevents the functions of a product in lower environments
Test	Used primarily by QAs when planning for testing
UX Work Item	Work that will be completed by the UX team
Epic	A collection of stories
Work Request	Work request from the business
Story	A piece of work that needs to be done from a user's perspective
Bug	Problem which impairs or prevents the functions of a product in production
DEA Work Item	Work that will be completed by the DEA team
General Item	Research, Documentation, Ad Hoc, and Other
Version	Allows for the creation, updating, and releasing of releases
Tech Debt	Usage and definition are to be determined
Vulnerability	Security scanning work item assigned to the Information Security team

Note: Jira issue types and their usages are subject to change

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CREATING AN ISSUE (continued)

Note: the following Issue fields relate to creating a Story work item.

- C. Summary*: Type in a brief description of the Issue
- D. Assignee: Assign yourself or the person who will work on the Issue
- E. Team Lead:
- F. Priority:
- G. Product Owner:
- H. Deployment Type*:
- I. Description: Type in a detailed description of the Issue
- J. Epic Link: Click the dropdown to select the Epic the Issue relates to
- K. Team: Click the dropdown to select the Team this Issue relates to

3. **Create:** Click the blue Create button to complete Issue creation.

Create Issue

Configure Fields

All fields marked with an asterisk (*) are required

Project*

IT Initial Training (ITINTRAIN)

Issue Type*

Story

Summary*

Assignee

Automatic

Assign to me

Team Lead

Priority

Medium

Product Owner

Deployment Type*

Self Deploy

Description

Style

B I U A A

Visual

Text

Component/s

None

Epic Link

Choose an epic to assign this issue to.

Team*

The Portfolio for Jira team that will work on this issue.

Quick Hit

Yes

Create and Save

Create

Cancel

BACKLOG

To access the Backlog, click the Backlog button in the Project Sidebar. The backlog has 2 sections:

1. **The Backlog:** A list of issues that have not yet been started
2. **The Sprint:** The space a team uses to plan a sprint

The screenshot displays the Jira Software interface for the 'IT Initial Training' project. The sidebar on the left contains navigation links: 'IT Initial Training Team 1 Sprint', 'Backlog' (highlighted with an orange box), 'Active sprints', 'Releases', 'Reports', 'Issues', 'Components', 'Structure', 'Tests', and 'Test Automation'. The main area is titled 'Backlog' and includes a search bar and filters: 'QUICK FILTERS: Only My Issues Recently Updated'. Below the filters, there are two sections. The top section, labeled with a blue circle '2', is titled 'IT Initial Sprint 1' and shows '1 issue - ACTIVE'. It contains a single issue 'INTRAIN-4 test'. The bottom section, labeled with an orange circle '1', is titled 'Backlog' and shows '1 issue'. It contains a single issue 'INTRAIN-5 test' and a '+ Create issue' button. A large green rectangle is overlaid on the bottom half of the page.

*** INTERNAL USE ONLY ***

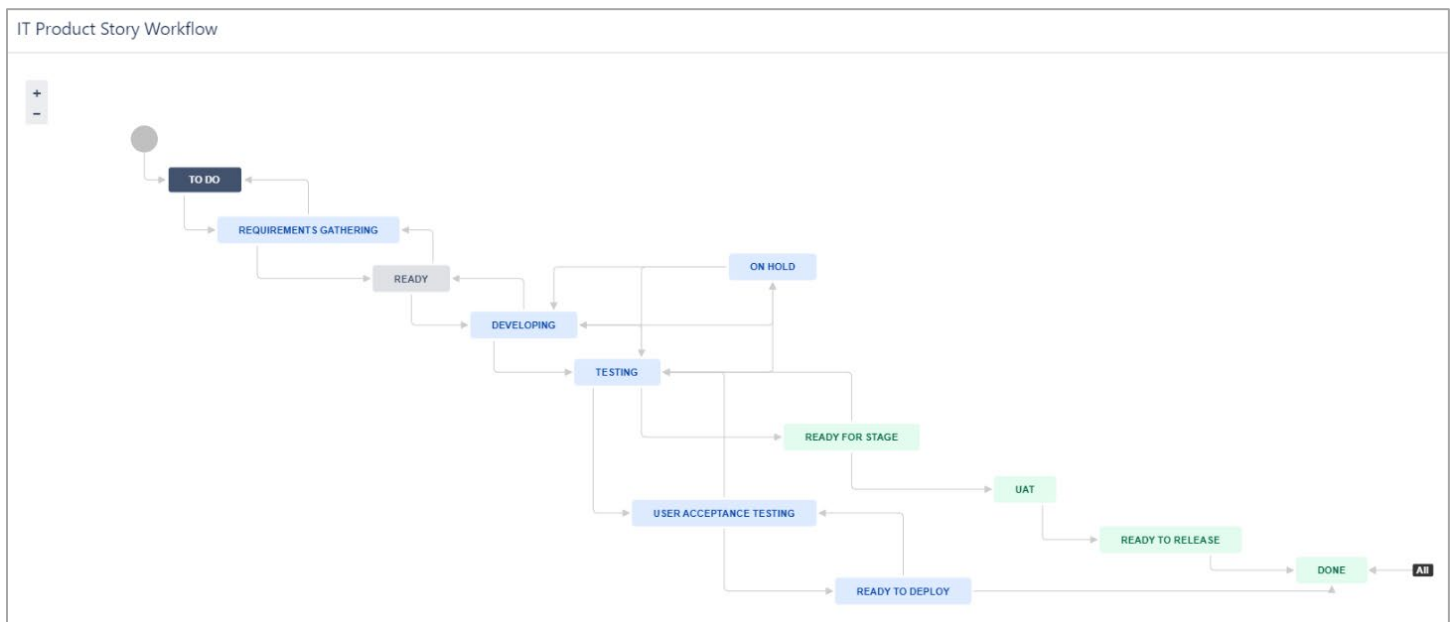
WORKFLOW

A workflow contains all the statuses a work item will transition through from start to finish. Below, you will find the IT Product Story Workflow and an explanation of each status.

STORY WORKFLOW

See below for a description of each status within a Story Workflow:

TO DO	Brand new Story that needs research
REQUIREMENTS GATHERING	The Story is being researched and refined based on requirements
READY	The Story is ready to be worked on
DEVELOPING	The Story is currently being developed
TESTING	The Story is currently being tested
ON HOLD	All work needs to be paused



STORY WORKFLOW CONTINUED

Once a story has made it to the Testing status, there are two paths it can take. The first path is deployment that can only be completed through the Release team and the second is a self-deploy through microservices.

Path 1: Release Team		Path 2: Self-Deploy	
READY FOR STAGE	Work has been tested and the Story is ready to be deployed to the Stage environment	USER ACCEPTANCE TESTING	The Story has been functionally tested and ready for approval
UAT	<p><i>*Teams are not able to move a Story to this status. The Release team changes this status and the update is automated through the attached deploy card when it moves into the "In Staging" column</i></p>	READY TO DEPLOY	Story has received UAT and is ready to be deployed into production
READY TO RELEASE	<p><i>*Teams are not able to move a Story to this status. This is automated through the attached deploy card when it moves to the "Ready for Prod" column</i></p>	DONE	The Story has been deployed and tested in Production. No more work is needed
DONE	<p><i>*Teams are not able to move a Story to this status, as it's automated. This status will be reached when the team has deployed to Production and all tasks on the deploy card are completed</i></p>		

ACTIVE SPRINT BOARD

The Active Sprint board shows all the work a team has committed to for a Sprint, organized by different columns. To view the board, click on the Active sprints button in the Project Sidebar.

The screenshot shows the Jira Software interface for a project named 'IT Initial Training'. The left sidebar contains a list of items: 'IT Initial Training Team 1 Sprint', 'Backlog', 'Active sprints' (highlighted with an orange box), 'Releases', 'Reports', and 'Issues'. The main area displays the 'IT Initial Sprint 1' board. At the top of the board, it indicates '43 days remaining' and provides buttons for 'Complete sprint', 'No scheme', 'Test View', and 'Board'. Below this, there are 'QUICK FILTERS' for 'Only My Issues' and 'Recently Updated'. The board is organized into columns: 'TO DO', 'REQUIREMENTS GATHERING', 'READY', 'DEVELOPING', 'TESTING', and 'READY FOR STAGE'. The 'TO DO' column contains a single issue card titled 'INTRAIN-5 test' with a status of 'None' and a green icon. The other columns are currently empty.

*** INTERNAL USE ONLY ***

REFLECT

Think back to the cons of working on a group project in the opening activity. If your group would've had Jira to help you plan and track your work, would the project have gone differently? Do you think it would've resolved some of the cons?

If you have any questions or concerns,
please reach out to your IT Initial Trainer