



JIRA FOUNDATIONS  
**PARTICIPANT GUIDE**  
**IT INITIAL**

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# JIRA FOUNDATIONS PARTICIPANT GUIDE

## OVERVIEW

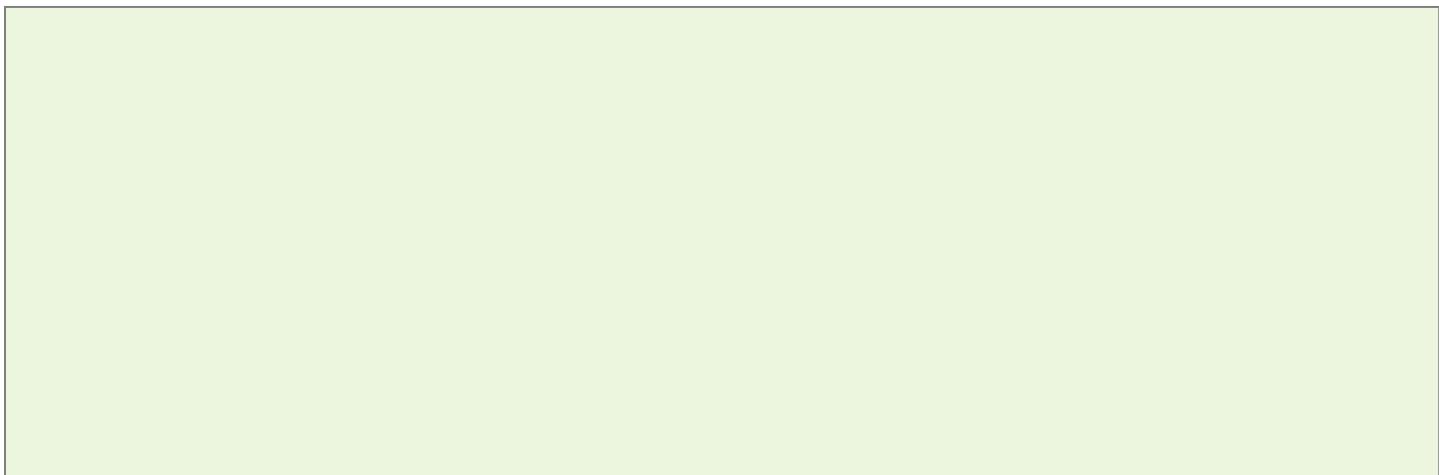
Jira is a work tracking tool that supports visibility into our IT projects and products. Teams use Jira to prioritize their backlog, track their work in progress, collaborate on work items, generate reports, and so much more!

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.



## 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.

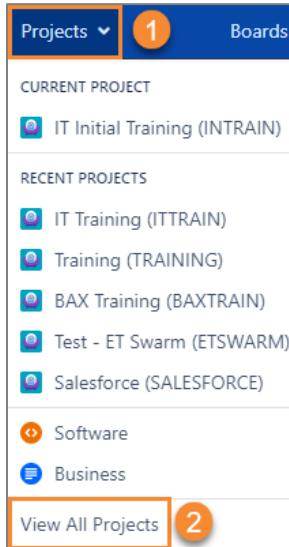


Dropdown/Button	Description
1. Dashboards	
2. Projects	
3. Issues	
4. Boards	
5. Tests	
6. Create	

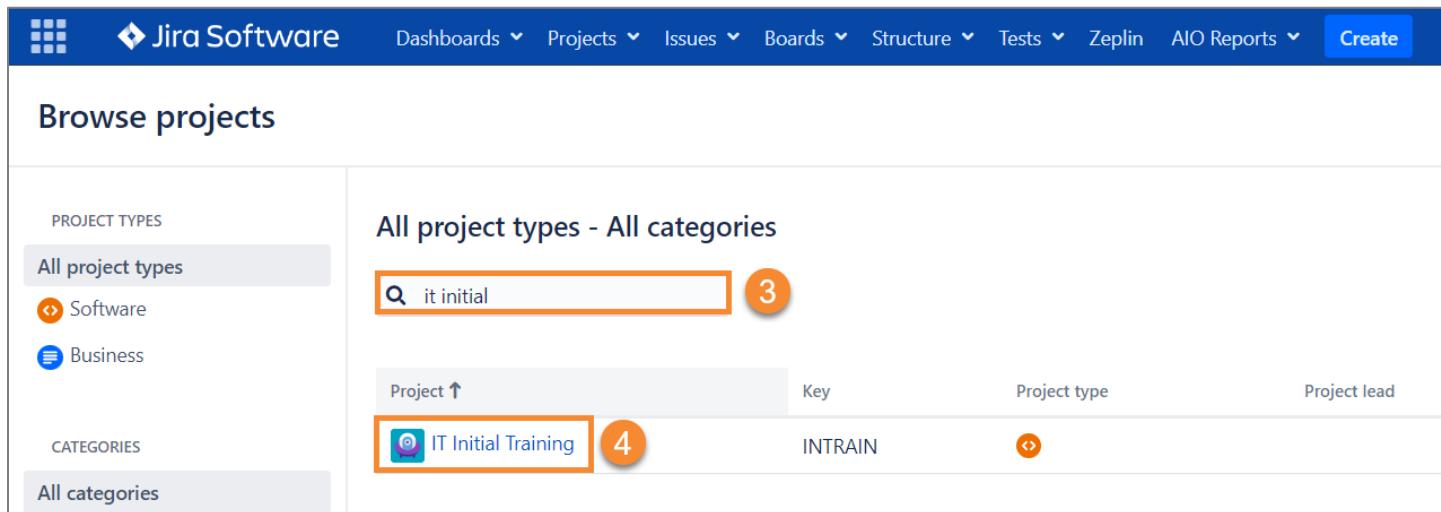
## PROJECT

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



Jira Software

Browse projects

PROJECT TYPES

- All project types
- Software
- Business

CATEGORIES

- All categories

All project types - All categories

Project ↑ Key Project type Project lead

Project ↑	Key	Project type	Project lead
IT Initial Training	INTRAIN	Software	

## PROJECT SIDEBAR

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

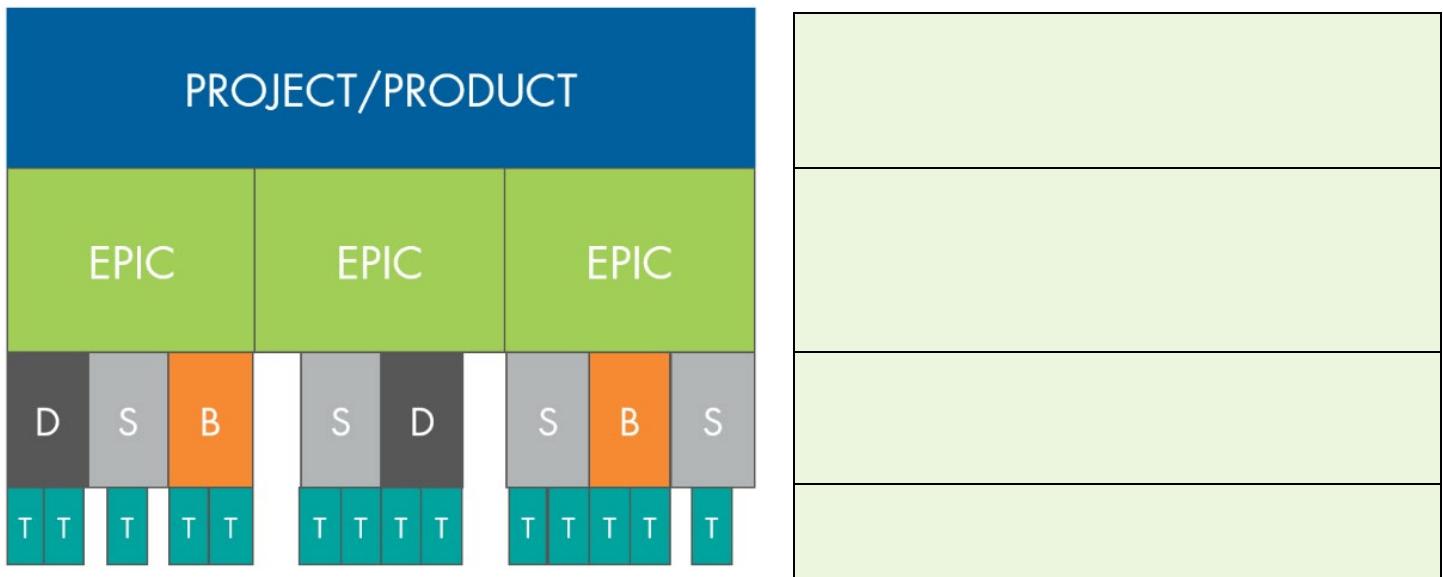
The screenshot displays the Jira Software interface for the project "IT Initial Training". The sidebar on the left is highlighted with an orange border and contains the following menu items:

- IT Initial Training Team 1 Sprint
- Backlog** (selected)
- Active sprints
- Releases
- Reports
- Issues
- Components
- Structure
- Tests
- Test Automation

The main content area is titled "Backlog" and shows "0 issues - 0". It includes a search bar, quick filters for "Only My Issues" and "Recently Updated", and a "+ Create issue" button. The sidebar also features tabs for "VERSIONS" and "EPICS".

## 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.

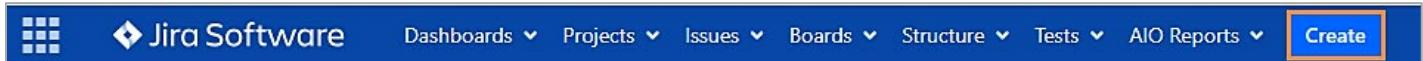


\*\*INTERNAL USE ONLY\*\*

## 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.)

**Create Issue**

All fields marked with an asterisk (\*) are required

**A** Project\* IT Initial Training (ITINTRAIN)

**B** Issue Type\* Epic

Field Tab\* Prioritization

Summary

Epic Name\*

Parent Link

Component/s

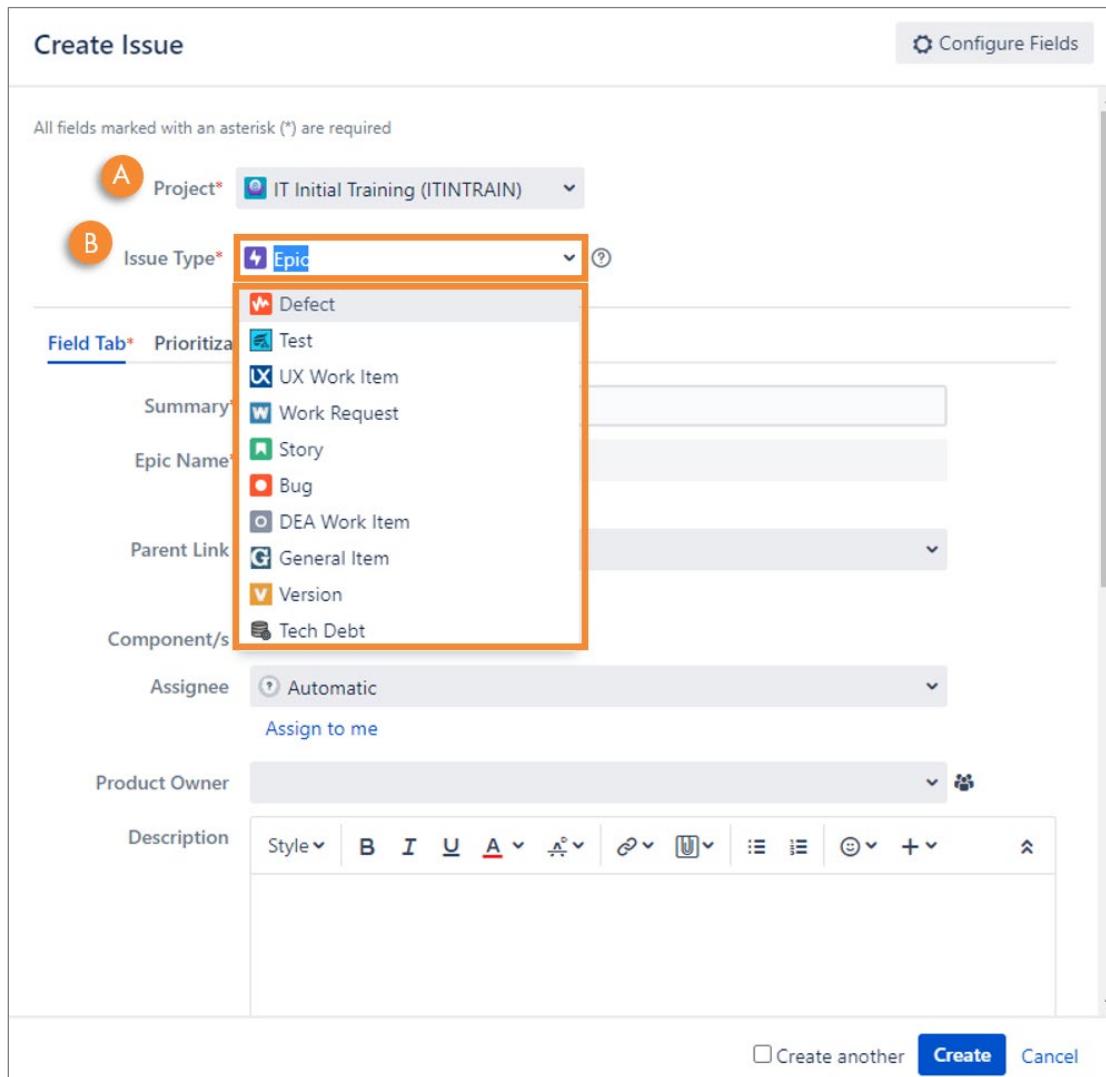
Assignee Automatic

Product Owner

Description

Style **B** **I** **U** **A** **A<sup>2</sup>** **C<sup>2</sup>** **U<sup>2</sup>** **≡** **≡** **⊕** **+** **✖**

Create another **Create** Cancel



\*\*INTERNAL USE ONLY\*\*

## 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

## 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**

All fields marked with an asterisk (\*) are required

Project\* IT Initial Training (ITINTRAIN) ▾

Issue Type\* Story ▾ ⓘ

C Summary\*

D Assignee Automatic ▾ ⓘ Assign to me

E Team Lead ▾ ⓘ

F Priority Medium ▾ ⓘ

G Product Owner ▾ ⓘ

H Deployment Type\* Self Deploy ▾

I Description

Visual Text

J Component/s None

K 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 an **3** **Create** Cancel

\*\*INTERNAL USE ONLY\*\*

## 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 shows the Jira Software interface for the 'IT Initial Training' project. The left sidebar lists project management options like Backlog, Active sprints, Releases, Reports, Issues, Components, Structure, Tests, and Test Automation. The 'Backlog' option is highlighted with a blue border and circled with a red number '1'. The main area is titled 'Backlog' and displays two sections: 'IT Initial Sprint 1' and 'Backlog'. 'IT Initial Sprint 1' is labeled as 'ACTIVE' with 1 issue, and 'Backlog' is labeled with 1 issue. Both sections include a 'Create issue' button. The interface includes a search bar, quick filters for 'Only My Issues' and 'Recently Updated', and a top navigation bar with links to Dashboards, Projects, Issues, Boards, Structure, Tests, Zepelin, AIO Reports, and a 'Create' button.

\*\*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

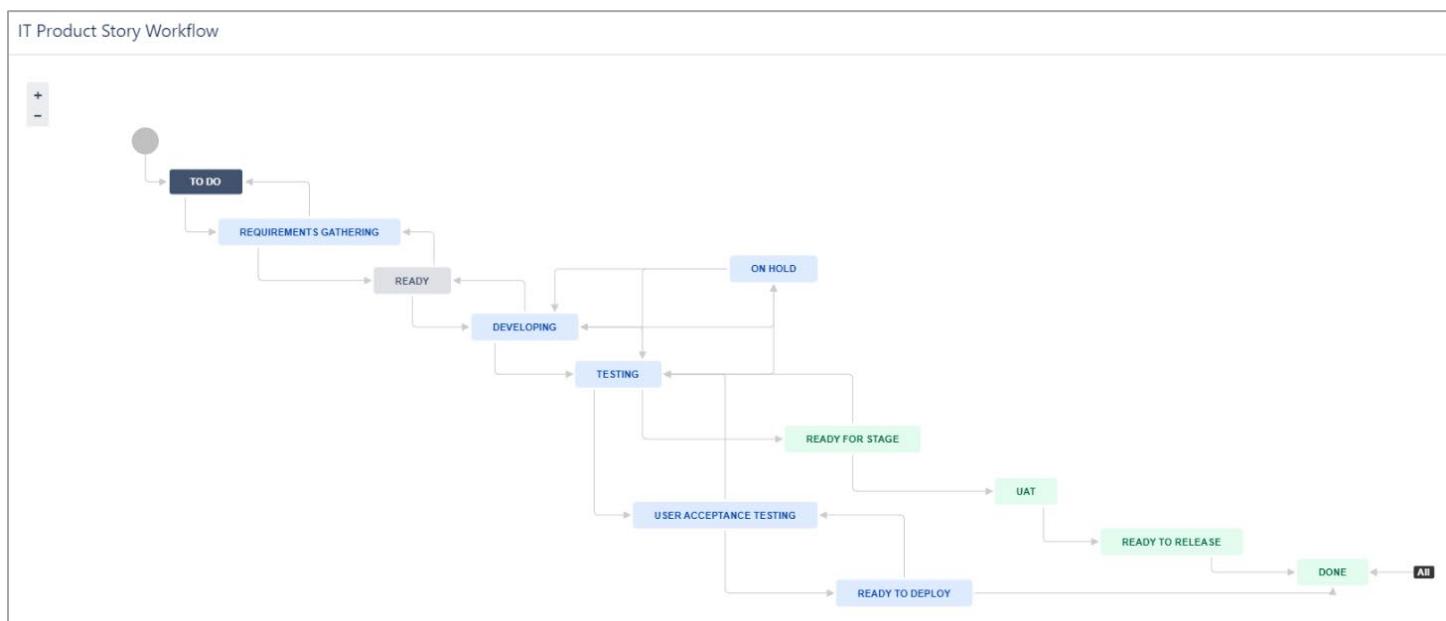
**TESTING**

The Story is currently being tested

**ON HOLD**

All work needs to be paused

\*\*INTERNAL USE ONLY\*\*



## 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
<b>READY FOR STAGE</b>	<b>USER ACCEPTANCE TESTING</b>
Work has been tested and the Story is ready to be deployed to the Stage environment	The Story has been functionally tested and ready for approval
<b>UAT</b>	<b>READY TO DEPLOY</b>
*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	Story has received UAT and is ready to be deployed into production
<b>READY TO RELEASE</b>	<b>DONE</b>
*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	The Story has been deployed and tested in Production. No more work is needed
<b>DONE</b>	

## 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.

Jira Software

Dashboards Projects Issues Boards Structure Tests Zeplin AIO Reports Create

Search

IT Initial Training

IT Initial Sprint 1

① 43 days remaining Complete sprint

No scheme Test View Board

QUICK FILTERS: Only My Issues Recently Updated

TO DO REQUIREMENTS GATHERING READY DEVELOPING TESTING READY FOR STAGE

INTRAIN-5 test None

Backlog

Active sprints

Releases Reports Issues

\*\*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