

How to - Jira Full developer flow and types of Issues (Epic, Story and Bugs)

Workflows Descriptions

Jira Workflows are a powerful effective tool that will help increase **transparency, accountability** and **productivity**. Plan, track, and release great software with workflows designed to fit every initiative or project. Start with a template, or create a custom one and get your team working more efficiently and transparently. Every team has their own definition of 'Done' and how to get there. A Jira workflow is represented on a digital board and displays the statuses and transitions of every item of work. As your work progresses, team members can access the most accurate information anytime, anywhere.

Increase transparency, accountability, and productivity

Transparent project management	Team member accountability	Improved customer satisfaction
With all work related to a project organized by its status (think: To Do, In Progress, Done - but the sky's the limit!), every team member clearly understands what's on his or her plate and can see the status of everyone else's workload.	Transparent project management that extends to supporting teams and executives naturally creates a sense of responsibility for the core team. Schedule brief team check-ins to provide team members an opportunity to identify any blockers.	A common pain point among product teams is estimating when a certain feature will be complete and ready for customers. By organizing work into a status, teams can accurately predict when something will be completed and released to users.

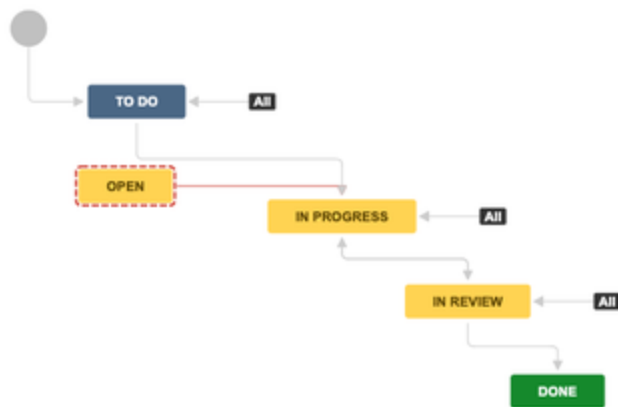
Methodologies to guide your workflow

Scrum	Kanban	Jira Epics and Stories	Custom
Perhaps the most famous of the Agile methodologies, Scrum encourages team collaboration by focusing on a single goal at a time and delivering incrementally. A standard Scrum process begins with the creation of a product backlog, which in simple terms, is really the team's to-do list. Use Sprints and picks tasks from the backlog assigning it to that sprint.	Unlike Scrum, Kanban focuses on status rather than due dates. Each item of work progresses through pre-defined project stages so teams can easily see what work is in-progress and identify roadblocks. A basic kanban board is a three-step workflow: To Do, In Progress, and Done. But depending on the unique requirements and composition of your team, additional workflow stages can be mapped in.	While not a methodology per se, epics and stories are Agile artifacts to classify amount of work. An epic captures a large body of work that can be broken down into a number of smaller tasks. Those smaller tasks, called user stories, are an effective way to write product backlog items.	Many teams discover that strictly adhering to Scrum or Kanban doesn't work for their team, and that's where Jira's new project type come in. The concept behind Jira's new board is for teams to start simple and pull in various elements - whether it be additional stages to the workflow, a Sprint, a Backlog, or a work-in-progress limit - as needed.

Creating workflow Best Practices

- **Gather all of your stakeholders** Workflow is about scaling culture, and culture is about people. Whenever it comes time to build a process around a set of people, identify all the stakeholders for that workflow.
- **Keep your Jira workflow simple** Aim for simple and scalable instead. Whenever adding a new status to a workflow, make sure you have no other option. Let's look at two examples.
- **Make every transition count** Jira has a number of options admins can take advantage of when setting up transitions: (Conditions, Validators, Post functions, Assignees, Properties)
- **Don't edit live workflows** It is always recommended that you clone your workflow and work off of the duplicate and then swap the workflows out when ready.
- **Allow course correction** Within reason. Allowing people to reverse a transition gives the flexibility to correct trivial handling errors.
- **Ensure transitions exist** No issues should ever be marooned in a status. Ensure all issues have a path to another status so your team can continue to move work forward.
- **Don't confuse resolution with status** Status describes where an item is in the workflow; resolution explains why an item is not in flight anymore, i.e. closed, cancelled, not doing, etc.
- **Design properly** your process from a business perspective and then decide on the best fit from a workflow/issue type structure to reflect business reality in Jira Software.

Example of a simple Flow



Issue Types

There are multiple types of Issues we can create. The main common ones are Epic, Story, Bug and Initiative. For each of the types below, the

Epic: A big user story that needs to be broken down.

Story: A user story is the smallest unit of work that needs to be done.

Task: A task represents work that needs to be done.

Subtask: A subtask is a piece of work that is required to complete a task.

Bug: A bug is a problem which impairs or prevents the functions of a product.

Fields for each Issue Types

Epic	Story	Bug
<ul style="list-style-type: none"> • Epic Name Short name to identify this epic. • Assignee Who this ticket should be assigned to. • Reporter Name of Reporter. • Attachment File or document to attach to issue. • Components Defined subsections of a project. • Description Detail description box. • Fix versions Issues to link to. • Labels Select or define new label grouping. • Linked Issues Is this issue has a connection with other issue types • Priority The Priority Lowest to Highest selection. • Sprint Which sprint does this ticket belong to. • Summary Brief summary of this ticket. 	<ul style="list-style-type: none"> • Description Short name to identify this Story. • Assignee Who this ticket should be assigned to. • Reporter Name of Reporter. • Attachment File or document to attach to issue. • Components Defined subsections of a project. • Epic Link Which Epic does this ticket belong to. • Fix versions Issues to link to. • Labels Select or define new label grouping. • Linked Issues Is this issue has a connection with other issue types • Priority The Priority Lowest to Highest selection. • Sprint Which sprint does this ticket belong to. • Summary Brief summary of this ticket. 	<ul style="list-style-type: none"> • Description Short name to identify this Story. • Assignee Who this ticket should be assigned to. • Reporter Name of Reporter. • Affects versions Release Versions this bug affected. • Attachment File or document to attach to issue. • Components Defined subsections of a project. • Environment The Environment this bug appears. eg OS, hardware specs • Epic Link Which Epic does this ticket belong to. • Fix versions Issues to link to. • Labels Select or define new label grouping. • Linked Issues Is this issue has a connection with other issue types • Priority The Priority Lowest to Highest selection. • Sprint Which sprint does this ticket belong to. • Summary Brief summary of this ticket.

Creating a workflow

1. Go to Administration system page and click the Issues types tab.
2. Select Workflow Schemes tab on the left index and select Add Workflow scheme.

Administration Search Jira admin Back to project: Novartis DevOps Team

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Workflow schemes

Workflow Schemes allow you to define which workflows apply to given issue types and projects.

Active

Name	Projects	Issue Type	Workflow	Actions
NDT: Software Simplified Workflow Scheme Generated by JIRA Software version 8.0.0-DAILY20190215023029. This workflow scheme is managed internally by Jira Software. Do not manually modify this workflow scheme.	• Novartis DevOps Team	<input type="checkbox"/> Unassigned Types → classic default workflow <input type="checkbox"/> Sub-task → Software Simplified Workflow for Project NOV <input checked="" type="checkbox"/> Bug → Software Simplified Workflow for Project NOV <input checked="" type="checkbox"/> Task → Software Simplified Workflow for Project NOV <input checked="" type="checkbox"/> Story → Software Simplified Workflow for Project NOV		Edit Copy
SDE: Software Simplified Workflow Scheme Generated by JIRA Software version 8.0.0-DAILY20190215023029. This workflow scheme is managed internally by Jira Software. Do not manually modify this workflow scheme.	• SDE	<input type="checkbox"/> Unassigned Types → Software Simplified Workflow for Project SDE		Edit Copy

3. Enter the name of the workflow and the description for that workflow.

Workflows

A workflow defines which statuses and transitions an issue type can use within a project.

The workflow scheme defines which workflow applies to each issue type in this project. To change the workflow scheme used, you can select a different workflow scheme, or modify the current scheme.

[Learn more about Workflows](#)

Scheme used by this project: SDE: Software Simplified Workflow Scheme

Workflow	Issue Types	Actions
Software Simplified Workflow for Project SDE (View as text)	<input checked="" type="checkbox"/> Story <input checked="" type="checkbox"/> Bug <input checked="" type="checkbox"/> Epic <input checked="" type="checkbox"/> Task <input checked="" type="checkbox"/> Sub-task	

Click Here → Add Workflow ▾ Switch Scheme

4. In the workflow section, you can add a status and/or a transition to build the workflow diagram you want to build.

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Workflows
Developer-workflow INACTIVE
a workflow for developer

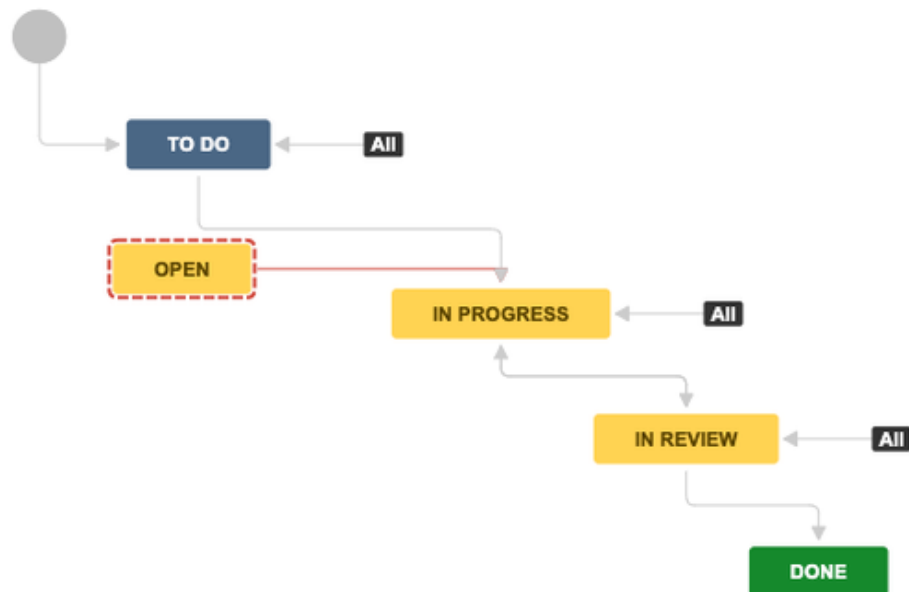
Diagram Text Export

+ Add status + Add transition ☐ Show transition labels Draft last saved by you, Just no

+
-

Add a Custom Status Add a transition b/n Status

5. Once done save your workflow and publish it. A Simple developer workflow diagram looks like this.



Creating an Issue type

1. Go to Administration system page and click the Issues types tab.
2. Select Issue Types tab on the left index and select Add Issue type.

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Issue types

Name	Type	Related Schemes	Actions
Bug A problem which impairs or prevents the functions of the product.	Standard	<ul style="list-style-type: none"> • NDT: Scrum Issue Type Scheme • SDE: Scrum Issue Type Scheme 	Edit Delete Translate
Epic Created by Jira Software - do not edit or delete. Issue type for a big user story that needs to be broken down.	Standard	<ul style="list-style-type: none"> • Default Issue Type Scheme • NDT: Scrum Issue Type Scheme • SDE: Scrum Issue Type Scheme 	Edit Delete Translate
Story Created by Jira Software - do not edit or delete. Issue type for a user story.	Standard	<ul style="list-style-type: none"> • NDT: Scrum Issue Type Scheme • SDE: Scrum Issue Type Scheme 	Edit Delete Translate

[Add issue type](#)

- Fill out the Name, Description and the issue type and click Add. This will create the new Issue type and saves it in this project.

Add Issue Type

Name *

Description

Type

☒ Standard Issue Type

☐ Sub-Task Issue Type

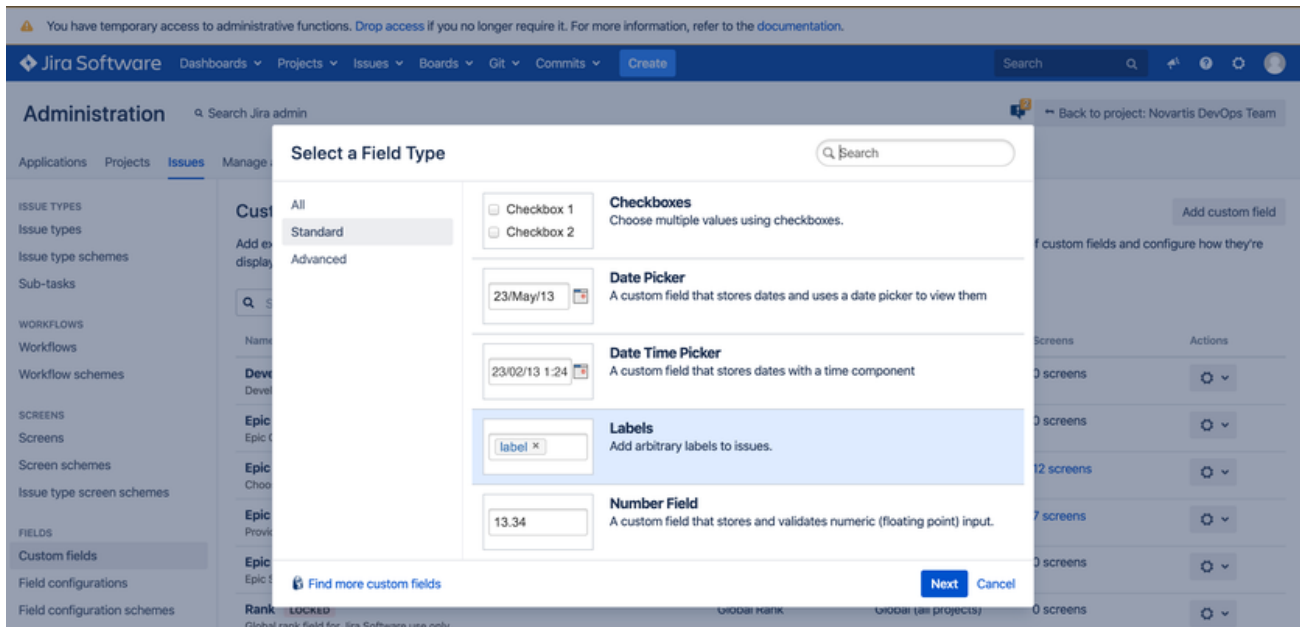
[Add](#) [Cancel](#)

- Similarly Create the Issue type Schemes by selecting the Issue type schemes on the left side and Assign the issues you want to assign to this scheme.

Creating a Custom Field

All the above fields for each issue types exist by default. If there is a need for Custom Field type,

- Go to Administration system page and click the Issues types tab.
- Select Custom Fields tab on the left side and click Add Custom field.
- Select Field type and then click Next.



4. Fill out the Name, Description and Options.

The screenshot shows the 'Configure Labels Field' form. The form has three main sections: Name, Description, and Options. The Name field is filled with 'my-custom-field'. The Description field is empty. The Options field is empty. The form has 'Previous', 'Create', and 'Cancel' buttons at the bottom right.

5. Similarly Create Field configurations by selecting the Field Configurations tab on the left and then click Add Field Configuration.
6. Enter Name and Description for the field configuration.

Creating a Screen

Follow the following Confluence to see detail information about Screen definitions. [How To - Jira - Screen Definitions](#)

1. Go to Administration system page and click the Issues types tab.
2. Select Screen tab on the left side and click Add Screen.
3. Enter Name and Description of the Screen.

4. Once you click add, it will take you to a page to add all the fields you would like to include on this Screen. (Keep the List in order of your preference).

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Configure Screen

USED BY 1 PROJECT

This page shows the way the fields are organized on **Epic-screen** screen.

Note: when the screen is shown to the user only non-hidden fields that the user has permissions to edit will be actually displayed.

Field Tab

Field	Type
Epic Name	Name of Epic
Assignee	System field
Description	System field

my-custom-field Add

5. Once done, go back to the previous page and create a Screen Schemes by going to the Screen schemes tab on the left and clicking Add Screen scheme.

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View Screen Schemes

Add screen scheme

Screen Schemes allow you to choose what screens are shown for each issue operation. Screen Schemes are mapped to issue types using **Issue Type Screen Schemes**, which can be associated with one or more projects.

Note: a screen scheme can only be deleted if it is not used in a **Issue Type Screen Scheme**.

Name	Issue type screen schemes	Actions
Default Screen Scheme Default Screen Scheme	• Default Issue Type Screen Scheme	Configure Edit Copy
Gyan: Scrum Bug Screen Scheme		Configure Edit Copy Delete
ND: Kanban Bug Screen Scheme		Configure Edit Copy Delete
ND: Kanban Default Screen Scheme	• ND: Kanban Issue Type Screen Scheme	Configure Edit Copy

6. Fill out the Screen Scheme Name and Description and assign it with the screen you created earlier.

Add screen scheme

Name* epic-screen-scheme

Description

Default Screen Epic-screen

The screen to show for unmapped issue operations in the new scheme.

Add Cancel

7. Once done, go back to the previous page and create a Issue types screen schemes by going to the Issue types screen schemes tab on

the left and clicking Add Issue types screen scheme.

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Issue Type Screen Schemes

[Add issue type screen scheme](#) ⓘ

Info An Issue Type Screen Scheme allows you to choose what [Screen Scheme](#) is used for each issue type. Then, an Issue Type Screen Scheme can be associated with one or more projects, to specify what Screen Scheme, and hence what [Screen](#) should be used for a particular issue operation for the projects' issues.
Note: it is not possible to delete an Issue Type Screen Scheme, if it is associated with at least one project.

Name	Projects	Actions
Default Issue Type Screen Scheme The default issue type screen scheme		Configure Edit Copy
Epic Issue Type Screen Scheme		Configure Edit Copy Delete
ND: Kanban Issue Type Screen Scheme		Configure Edit Copy Delete

8. Fill out the Name, Description and assign the Screen Scheme with the one you created above.

Add issue type screen scheme

Name*

Description

Screen Scheme

The screen scheme to use for unmapped issue types

[Add](#) [Cancel](#)

9. Once done, Go to the project tab and Select the Project you want to update with the new screen.

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Applications **Projects** Issues Manage apps User management Latest upgrade report System

Projects [Create project](#)

Project	Key	Project type	Project lead	Project category	Last issue update	Issues	Actions
Novartis DevOps Team	NDT		admin@company.co	No category	17 Oct 2019	15	...
SDE	SDE		admin@company.co	No category	6 Oct 2019	1	...

10. Click Screens tab and edit the existing screen you want to update with the new change.

Project settings

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Delete project

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Edit your project's screens

Screens group together the fields that are visible on an issue type. You can change which fields are visible by editing the screen, providing the screen isn't shared with other projects. To do so, select a screen and start editing. Check out our [screens documentation](#) for more info.

Screens

⚙️

Actions

A screen defines how fields are displayed for an issue. Different screens can be used when an issue is created, viewed, edited, or transitioned through a workflow.

The screen scheme defines which screens apply to each issue type. To change the screens used, you can select a different screen scheme, or modify the current scheme.

[Learn more about Screens](#)

📘

Scheme used by this project: NDT: Scrum Issue Type Screen Scheme

> NDT: Scrum Default Screen Scheme

DEFAULT

📄 Story

DEFAULT

📄 Epic

📄 Task

📄 Sub-task

11. Associate an Issue operation with a screen by clicking edit option.

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Configure Screen Scheme — NDT: Scrum Default Screen Scheme

USED BY 1 PROJECT

Associate an issue operation with a screen

📘

Please use the table and the form below to select which screen will be displayed for each issue operation. The *Default* entry is used to indicate which screen should be used for operations that do not have a specific mapping in this scheme.

To activate this screen scheme, map it to one or more issue types using an [Issue Type Screen Scheme](#) and then associate the Issue Type Screen Scheme with one or more projects.

Note: a screen scheme can only be deleted if it is not a default scheme and is not associated with any projects.

• [View all screen schemes](#)

Issue Operation	Screen	Actions
Default	Epic-screen	Edit
Used for all unmapped operations.		

12. Select the Screen you created above by selecting the screen name from the drop down option.

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Edit Screen Scheme Item

Use the form below to select a screen that will be used for the **Default** issue operation.

Screen

Epic-screen

The screen to show for this issue operation.

Update

Cancel

13. Click update to save.

14. Once done, you can create a new Issue with the type you created above. If you follow the steps above you will see something like this on the input options. You can see the Epic Name, Assignee, Description and the my-custom-field fields are the only ones we created for this issue type screen.

Create Issue

Project

Novartis DevOps Team

Issue Type

Epic

Epic Name

Provide a short name to identify this epic.

Assignee

Automatic

Assign to me

Description

Style

B

I

U

A

Visual

Text

my-custom-field

Begin typing to find and create labels or press down to select a suggested label.

Create

Cancel

To Create screen definitions: How To - Jira - Screen Definitions

To Create a transition: How to - Jira Auto-transition