


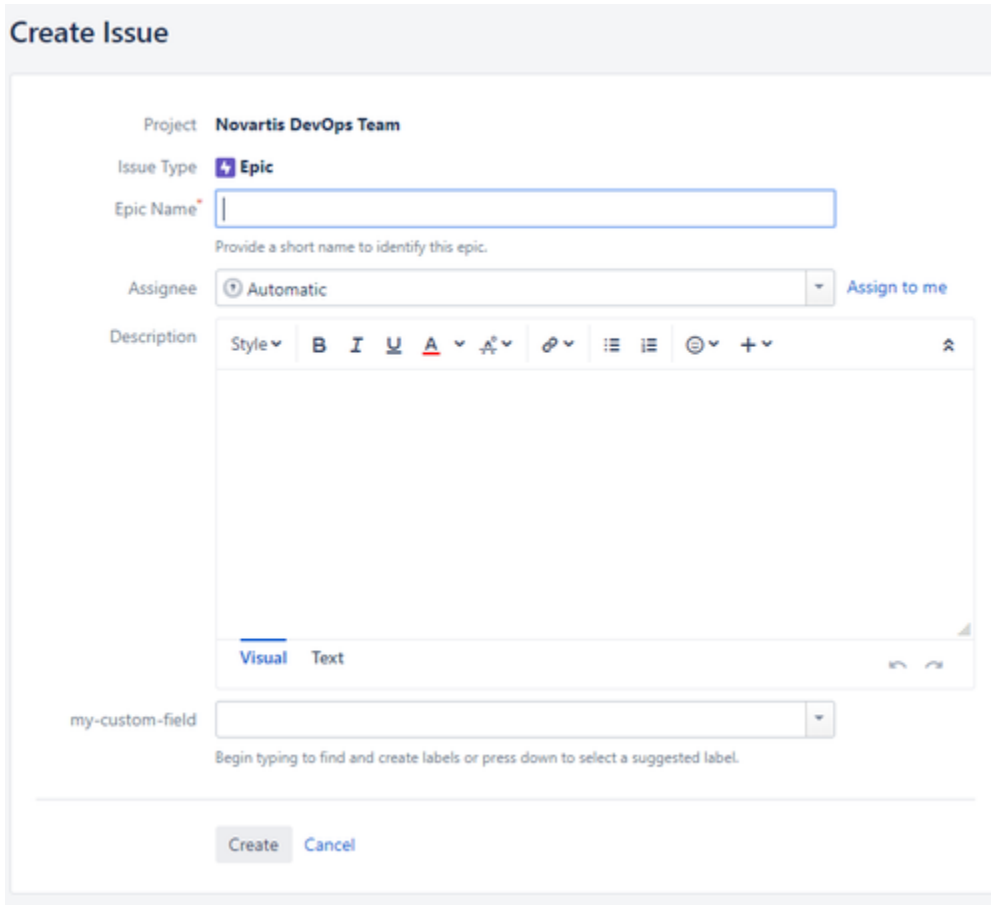
How To Create Epic and Initiative workflows and screens in Jira..

Step 1: Create a new epic in Jira Software

There are two ways to create an epic:

- **Create an epic from a new issue**

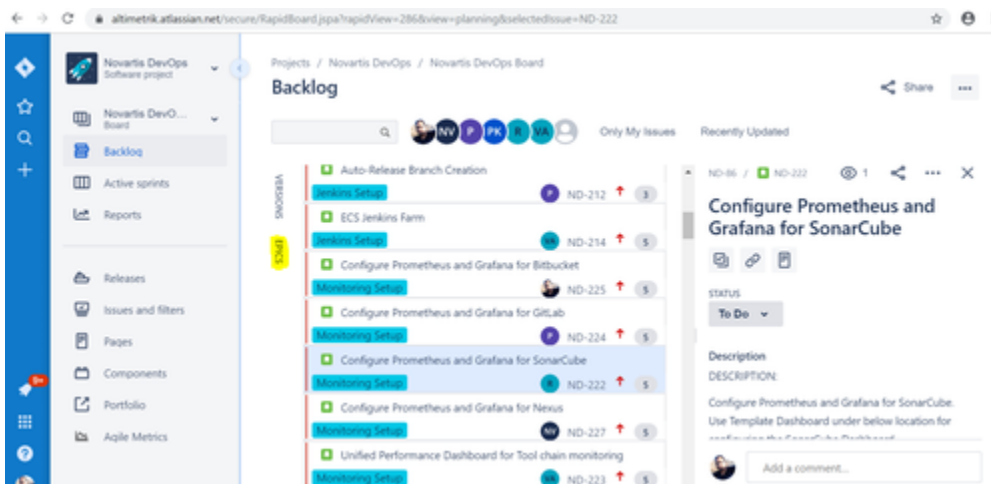
1. Click  > **Issue** in the top-right corner.
2. Select **Create** for the issue type.



The 'Create Issue' form is shown for the 'Novartis DevOps Team' project. The 'Issue Type' is set to 'Epic'. The 'Epic Name' field is empty, with a prompt 'Provide a short name to identify this epic.' below it. The 'Assignee' is set to 'Automatic' with an 'Assign to me' button. The 'Description' field is empty, with a rich text editor toolbar above it. At the bottom, there is a 'my-custom-field' dropdown and 'Create' and 'Cancel' buttons.

- **Create an epic from the Epics Panel**

1. Navigate to the Backlog.
2. Click on the epics panel.



The screenshot shows the Jira Backlog view for the 'Novartis DevOps' project. The left sidebar contains navigation links: Novartis DevOps Software project, Novartis DevOps Board, Backlog, Active sprints, Reports, Releases, Issues and filters, Pages, Components, Portfolio, and Agile Metrics. The main area displays a list of issues in the backlog, including 'Auto-Release Branch Creation', 'ECS Jenkins Farm', 'Configure Prometheus and Grafana for Bitbucket', 'Configure Prometheus and Grafana for GitLab', 'Configure Prometheus and Grafana for SonarCube', 'Configure Prometheus and Grafana for Nexus', and 'Unified Performance Dashboard for Tool chain monitoring'. The right sidebar shows the details for issue ND-222, titled 'Configure Prometheus and Grafana for SonarCube', with a 'To Do' status and a description.

3.Hit **Create epic**.

When you create an epic, you'll need to enter the following details:

- **Epic name** - A short identifier for your epic. This will be used as a label on issues that belong to this epic.
- **Epic summary** - You'll see this whenever Jira displays the epic.


The screenshot shows the 'Create Epic' form in Jira. At the top, there are two buttons: 'Import issues' and 'Configure fields'. Below these, the 'Project' dropdown is set to 'Novartis DevOps (ND)'. The 'Issue Type' dropdown is set to 'Epic', with a help icon to its right. A note below the dropdown states: 'Some issue types are unavailable due to incompatible field configuration and/or workflow associations.' The 'Epic Name' field is a text input box with a red asterisk, and a hint below it says 'Provide a short name to identify this epic.' The 'Summary' field is a larger text input box. At the bottom right, there are three buttons: 'Create another' (with a plus icon), 'Create' (in blue), and 'Cancel'.

Step 2: Add and remove stories

When you've created an epic, you'll need to add stories to it.

There are two ways to add a story to an epic:

- **From the issue create screen**

1. Click  > **Issue** in the top-right corner.
2. Select **Create** for the issue type.
3. Select any issue type other than Epic.
4. Find the **Epic Link** field, and select your epic.

Fix Version/s **None**

Priority **Medium** ⓘ

Labels

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

Environment

Style **B I U A** **Color** **Link** **Image** **Table** **More**

Visual **Text**

For example operating system, software platform and/or hardware specifications (include as appropriate for the issue).

Affects Version/s **None**

Linked Issues **blocks**

Issue +

Begin typing to search for issues to link. If you leave it blank, no link will be made.

Assignee ⓘ Automatic [Assign to me](#)

Epic Link

Choose an epic to assign this issue to.

Sprint

Jira Software sprint field

Create **Cancel**

5.Fill in any other details you want, and hit **Create**.

From the Epics Panel

1. Navigate to the Backlog.
2. Open the Epics Panel.
3. Hit **Create issue in epic**.

Backlog

Only My Issues

VERSIONS

EPICS Create epic ×

All issues

Developer Workstation Setup

Jira Setup

ND-3 Jira Setup

Issues 19

Completed 5

Unestimated 12

Estimate 27

Create issue in epic

Linked pages

Jenkins Se PK ND-211 3

Auto-Jira Version Creation

Jenkins Se PK ND-213 3

Developer Workstation Setup C

1.0 - OCT RE.. PK ND-13 3

Configure Prometheus and Gra

Monitoring PK ND-226 5

Auto-Release Branch Creation

Jenkins Se P ND-212 3

ECS Jenkins Farm

Jenkins Se VA ND-214 5

Configure Prometheus and Gra

Monitoring ND-225 5

Configure Prometheus and Gra

Step 3: Complete your epic

To complete an epic:

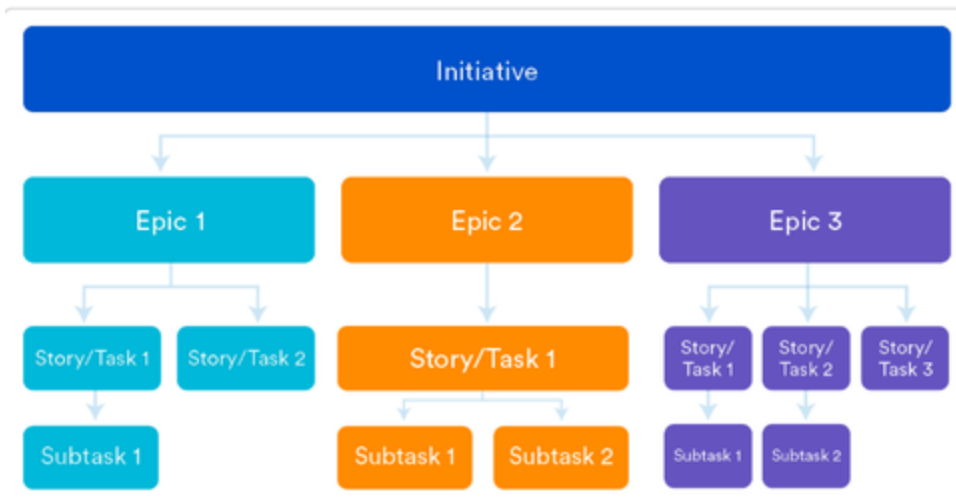
1. Navigate to the Backlog.
2. Open the Epics Panel.
3. Click the drop-down for your epic, and select **Mark as Done**.

Backlog


The screenshot shows the Jira Backlog interface. On the left, a sidebar titled 'VERSIONS' contains sections for 'EPICS' (with a 'Create epic' button), 'Jira Setup', 'Bitbucket Setup' (showing 'ND-45 Bitbucket Setup'), 'Issues' (7), 'Completed' (7), 'Unestimated' (0), 'Estimate' (21), and 'Create issue in epic'. The main area displays 'Novartis Sprint 0.4' with 23 issues. A context menu is open over the 'Unestimated' section, showing options: 'Color' (with a grid of colored squares), 'Edit name', 'View epic details', and 'Mark as Done' (highlighted in yellow). The right side of the main area shows a list of issues with their status, priority, and assignee.

Configuring initiatives and other hierarchy levels

- **Epic hierarchy level**– Issues of the epic hierarchy level are the byproducts of higher-level priorities being broken down into smaller and more manageable chunks of work. In Jira, epic issues can span multiple sprints in a project, and are comprised of multiple stories.
- **Story hierarchy level** – Issues of the story hierarchy level are typically comprised of *stories* and *tasks*. In Jira, story and task issues are the smallest units of work; stories capture functionality requirements, while tasks capture anything that can be of value to the team working on them.
- **Sub-task hierarchy level** – Issues of the sub-task hierarchy level represent smaller chunks of work that need to be completed, to complete a story.
- **initiative hierarchy level** - Typically configured at a higher level than epics, initiatives are the high-level priorities that multiple teams or departments work against in an organization or company. Initiatives can span multiple epics, projects, and teams, and the work for initiatives can last months and even years.

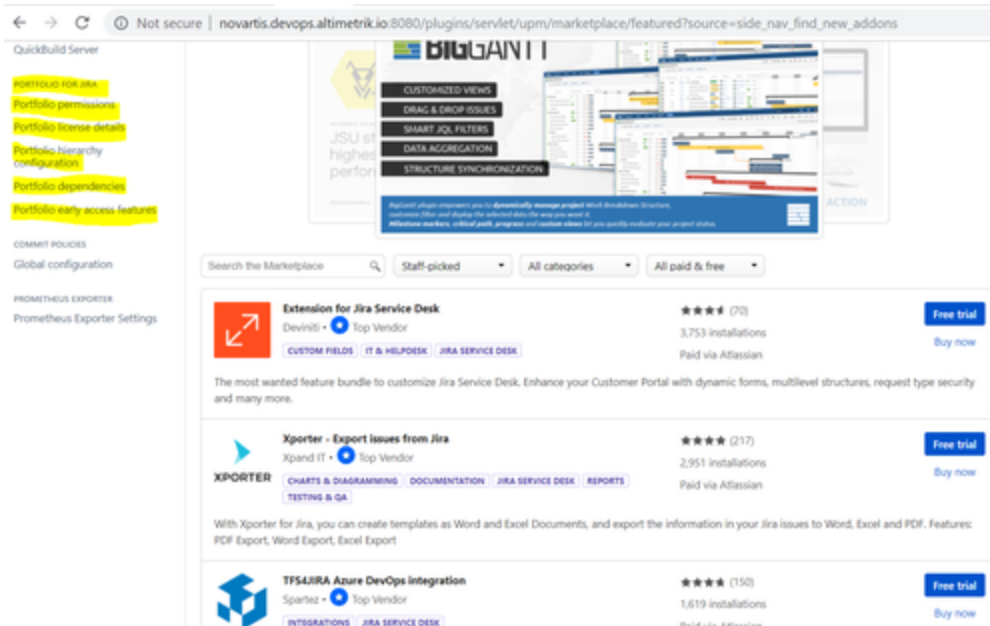


How to install Portfolio for Jira

1. In Jira go to  > **Applications** in the top-right corner.
2. Click **Find new apps** in the top.
3. In the 'Search the Marketplace' box, enter Portfolio for Jira, then click **Enter**.
4. Click **Free trial**. Wait a few seconds until the subscription is updated
5. Click **Get started**.
6. Click **Create a plan** to start working with Portfolio for Jira.

The screenshot shows the Jira Administration interface. The top navigation bar includes 'Jira Software', 'Dashboards', 'Projects', 'Issues', 'Boards', 'Git', 'Commits', and a 'Create' button. The left sidebar shows 'Administration' with a search bar and tabs for 'Applications', 'Projects', 'Issues', 'Manage apps', 'User management', 'Latest upgrade report', and 'System'. The main content area is titled 'Atlassian Marketplace for JIRA' and displays search results for 'Portfolio for Jira'. The search results show the app's logo, name, and a 'Free trial' button. Below the search results, there is a section for 'Easy Agile Roadmaps for Jira'.

7. Once your subscription is enabled, you can access Portfolio in the main navigation bar



Select **Create a plan** to begin to work with Portfolio.

Creating new hierarchy levels in Portfolio for Jira


- Go to **Portfolio > Administration > Portfolio Hierarchy Configuration** and click **+ Create Level**. Now you can see a list of all the level names and its Jira issue type.
- Type in the name and map the new level to a Jira issue type.
- You can remove the level by selecting **Remove**.
- Rearrange levels by dragging and dropping the tabs.
- You can also rename the hierarchy levels by going to **Portfolio > Settings > Portfolio Hierarchy Configuration** and changing the level name.

Adding the initiative level to multiple projects

An issue can live in a single Jira project. However, if your organization is working on several projects, you might want to consider having your initiative to span multiple projects.

If you're working with cross-project initiatives, you can create a dedicated Jira project, where the cross-project initiatives are stored, and then use the project as an issue source in your plan.







- Create a Jira project that will hold your initiatives.
- Go to your Jira application >  > **Issues**.

- Click **Add issue type**.
- Create a new issue type called **Initiative**, and set it as **Standard Issue Type**, and then click **Add**.
- Click **Issue type schemes** > find your **project** > click **Edit**.
- Drag and drop the **initiative** issue type to the issue types for your project.

Issue types

Add issue type

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

Modify Issue Type Scheme — NEW: Scrum Issue Type Scheme

USED BY 1 PROJECT

+ Add issue type

Scheme Name

Description

Default Issue Type

Change the order of the options by **dragging and dropping** the option into the desired order. Similarly, **drag and drop** the option from one list to the other to add or remove them.

Issue Types for Current Scheme

Remove all

- ☒ Task
- ☐ Sub-task (sub-task)
- ☐ Story
- ☐ Bug
- ☐ Epic

Available Issue Types

Add all

- ☐ Initiative

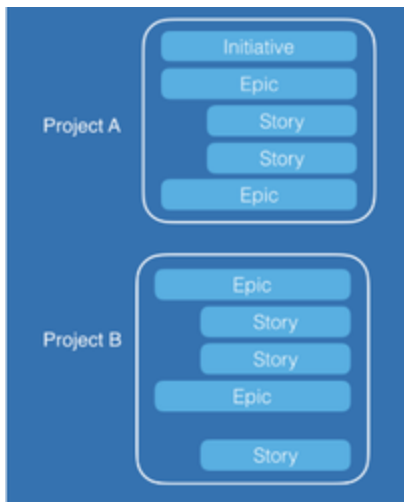
Save Reset Cancel


- Go to your plan via **Portfolio**(in header) > **View Portfolio**> click your **plan**.
- Click **more** (**⋮**) next to the plan name > **Configure** > **Issue sources**.
- Select your new project as an issue source.
- Go to **Portfolio** (in header) > **Administration**>**Portfolio Hierarchy Configuration**.
- Click **+ Create Level** and create the new **initiative** level.
- Click **Apply** > **Save changes**.

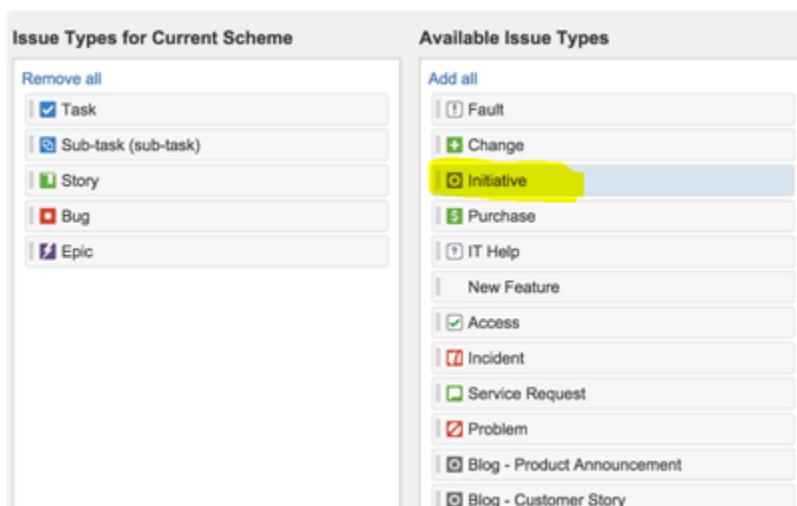
Adding the initiative level to a project

If you need more hierarchy levels in your project, and your initiatives don't span multiple projects, then you can choose to add the initiative level to *just* your project.

You can use this approach in cases where you need more hierarchy levels within your project, and when your initiatives will rarely be cross-project.



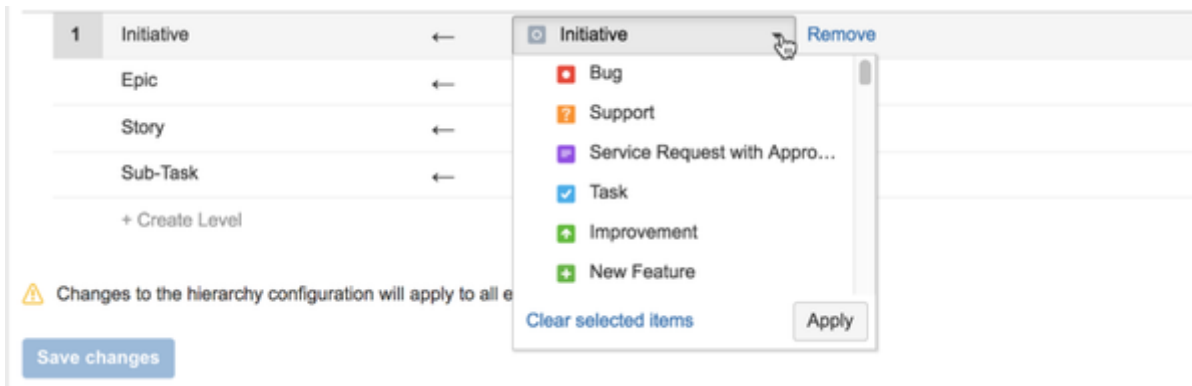
- Go to your Jira application >  > **Issues**.
- Click **Add issue type**.
- Create a new issue type called **Initiative**, and set it as **Standard Issue Type**, and then click **Add**.
- Click **Issue type schemes** > find your **project** > click **Edit**.
- Drag and drop the **initiative** issue type to the issue types for your project.



- Go to **Portfolio** (in header) > **Administration** > **Portfolio Hierarchy Configuration**.
- Click **+ Create Level** and create the new **initiative** level.
- Click **Apply** > **Save changes**.
- If your team doesn't want to see the initiatives in your Jira board, you can configure the board filter to exclude initiatives from the board. You can then create a new filter that only includes the initiatives, and then add that as an extra source to your plan.
- Connect your plan to both the project holding your initiatives, as well as the other projects or boards containing epics and stories.

Mapping Jira issue types to Portfolio for Jira levels

1. Before mapping a Jira issue type into Portfolio, make sure that the issue type has been created in your Jira application instance.
2. Once you've created your new issue type in your Jira application, it's time to map it into Portfolio for Jira.
3. Go to **Portfolio** (in header) > **Administration** > **Portfolio Hierarchy Configuration**.
4. Choose the issue types you want to configure from the drop-down menu, then map them into to the hierarchy level you want, and then click **Apply**.



Click **Save changes**. Now you can work with the new hierarchy levels in the scope view of your plans.

- For more details on Portfolio Plans please refer -<https://confluence.atlassian.com/jiraportfolioserver/working-with-portfolio-plans-952623578.html>