JIR Admin -

Setting up your JIRA Environment (Go to Tools and Select System option)

Setting up your Project

Setting up Fields and Screens

Setting up users, Groups, Notifications and Permissions

Setting up a Custom Workflow

Scrum Master/Project Manager –

Requesting for JIRA Project for the team

Setting up JIRA Board – Scrum or Kanban

Assigning users with the roles

Creating Product Backlog

Creating Sprint, Sprint Backlog, Spring Planning, Daily Scrum, Tracking/Monitoring the issues, Sprint Closure, Conducting Sprint Review, Conducting Sprint Retrospective

Product Backlog Refinement

Generating Reports – Sprint Report, Velocity Report

Creating custom filters and Creating Dashboards

JIRA Environment setup -

Project name size

Project Key Size

Allow unassigned issues

Allow voting and watching the issues

Issues Features –

Time Tracking

Issue linking

User Interface –

System Dashboard

Navigator columns (Default columns in the filter)

Look and Feel (Logo, Site Title, Favicon, Color Schemes (Background color, header color etc…, Gadget colors, Date/Time formats )

Announcement Banner (Set a banner that will display at the top of all pages in JIRA, this will help users on announcement made if any and make Visibility as Public/Private)

Application Navigator (This allows users to navigate to other URLS from top left corner)

Import and Export Feature s-

Backup Manager – Server backing up

JIRA Import – Importing JIRA data from other JIRA server

MAIL Features –

Incoming Mail

Mail Queue

ADVANCED –

Indexing

Attachment size , Enable thumbnails, Enable ZIP Support

Events – Sending default notification when issue is created

Webhooks

Services

Setting up a Project –

A Project is a container for tickets

Issue type – Enhancement, Bug, Task, and So on

Click on Projects – Click Create Projects –

* Blank Project – Start a project without any preconfigured settings
* Software Development – View your development tasks including build info, integrated source
* Agile Scrum – Manage your product development team with backlog, Stories and Sprints
* Agile Kanban - - Constrain work-in progress and manage your task flow
* Bug Tracking – Capture, Monitor and Triage bugs
* Project Management – Track your project status via work logs, project dashboards and reporting

Project Name, Key and Project Lead (Admin who manages this project)

Once the project is create, click on Administration – Edit Project

Project Name, URL, Project Avatar, Description

You can configure –

Issue Types, Workflows, Screens, Fields, Components, Roles, Permissions, Issue Security, Notifications

Setting up Fields and Screens –

PM requests for adding or updating or removing fields and also add new screen

Issue Type –

New Feature or Enhancement or Epic

Story

Task

Sub-Task

Defect

**Go to Tools – Issues for configuration**

SCREENS –

Screens – What fields belongs on the screen

Screen Schemes – Customize what screens are shown based on operation (ex: view/edit issue)

Issue Type Screen Schemes – What screen to show for what issue Type

FIELDS –

Tools – Issues ( Issue Types, Issue Type Schemes ( different rules for different projects), sub-tasks (allows sub-tasks to create)

Custom Fields – Define the custom fields

Field Configurations – All fields related to screen are mandatory or optional

Field Configurations screen – associated to project

Setting up Users, Groups, Notifications and Permissions –

**Tools – User Management - for creating users and groups**

**Go to Project – For Notifications and Permissions**

Setting up custom workflow -

Steps –

Open

IN PROGRESS  
RESOLVED

CLOSED

Transitions –

START PROGRESS

RESOLVE ISSUE

CLOSE ISSUE

**Navigation (Tools – Issues)**