

JIRA Essentials

Setup for success

Karan Rai



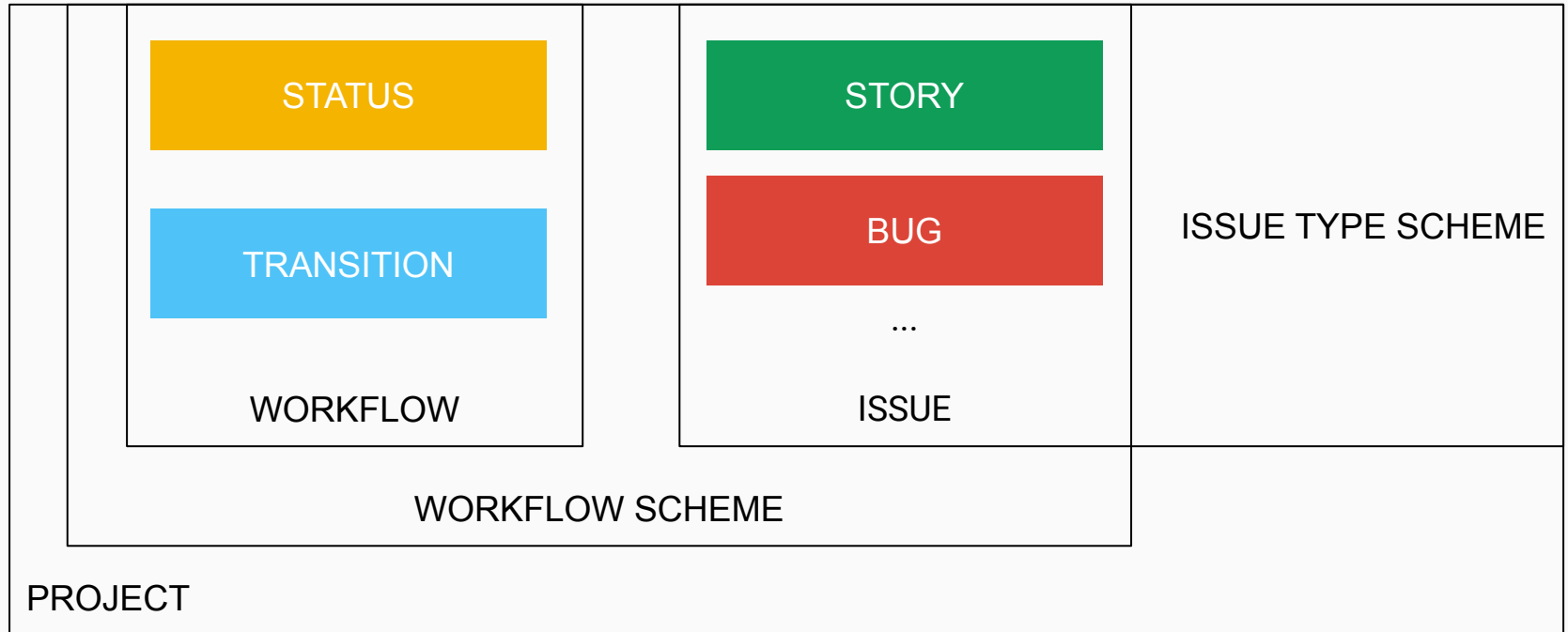
Roadmap

Setting Up	Planning Work	Estimation & Tracking	Productivity Tools	Best Practices
Issues Workflows Screens Core Concepts & Project setup basics	Backlog Versions Epics Stories Breaking down your work packets and organising them appropriately	Estimates Reports Estimation best practices & essential tracking tools such as burndown, velocity, Control charts	Navigating Analysis Code Integration Essential shortcuts, Filters and JQL, Smart commits	TBD TBD

Today

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Concepts



ISSUE TYPES

An Issue is a TODO!

What are the types of TODOs you plan to do?



STORY

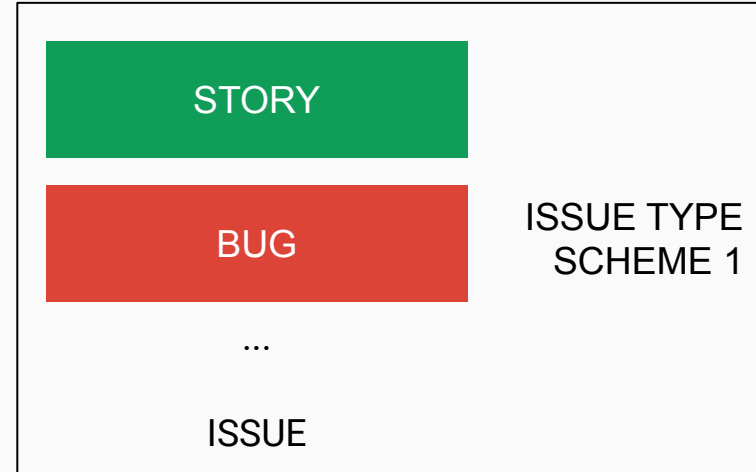
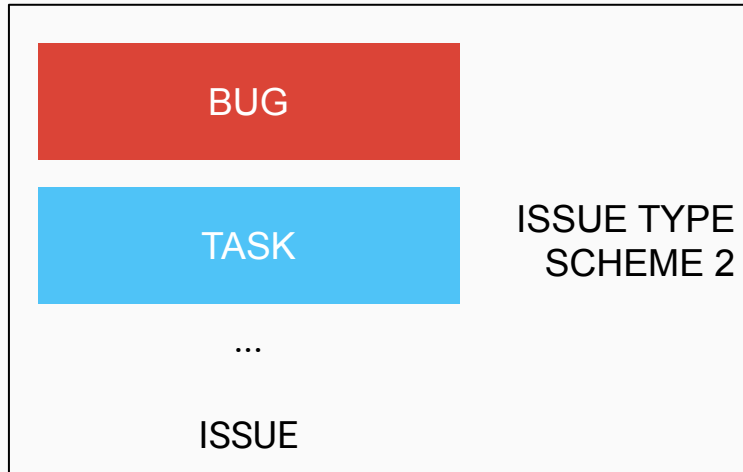
BUG

...

ISSUE

ISSUE TYPE SCHEME

A **set** of issue types that go together for specific purpose / project



How does it look like in JIRA








Issues

🔍 Search Jira admin

Issue types

Add issue type ?



Name	Type	Related Schemes	Actions
 Bug A problem which impairs or prevents the functions of the product.	Standard	<ul style="list-style-type: none">Default Issue Type SchemeSCR: Scrum Issue Type Scheme	Edit Delete Translate
 Change Request Change Request from the client.	Standard	<ul style="list-style-type: none">Default Issue Type SchemeSCR: Scrum Issue Type Scheme	Edit Delete Translate
 Epic A big user story that needs to be broken down. Created by Jira Software - do not edit or delete.	Standard	<ul style="list-style-type: none">Default Issue Type SchemeSCR: Scrum Issue Type Scheme	Edit Delete Translate
 Story Stories track functionality or features expressed as user goals.	Standard	<ul style="list-style-type: none">Default Issue Type SchemeSCR: Scrum Issue Type Scheme	Edit Delete Translate
 Task A task that needs to be done.	Standard	<ul style="list-style-type: none">Default Issue Type SchemeSCR: Scrum Issue Type Scheme	Edit Delete Translate
 Technical Debt Tasks to reduce technical debt	Standard	<ul style="list-style-type: none">Default Issue Type Scheme	Edit Delete Translate
 Sub-task The sub-task of the issue	Sub-Task	<ul style="list-style-type: none">Default Issue Type SchemeSCR: Scrum Issue Type Scheme	Edit Delete Translate

ISSUE TYPE SCHEME

Issues

🔍 Search Jira admin

Issue type schemes

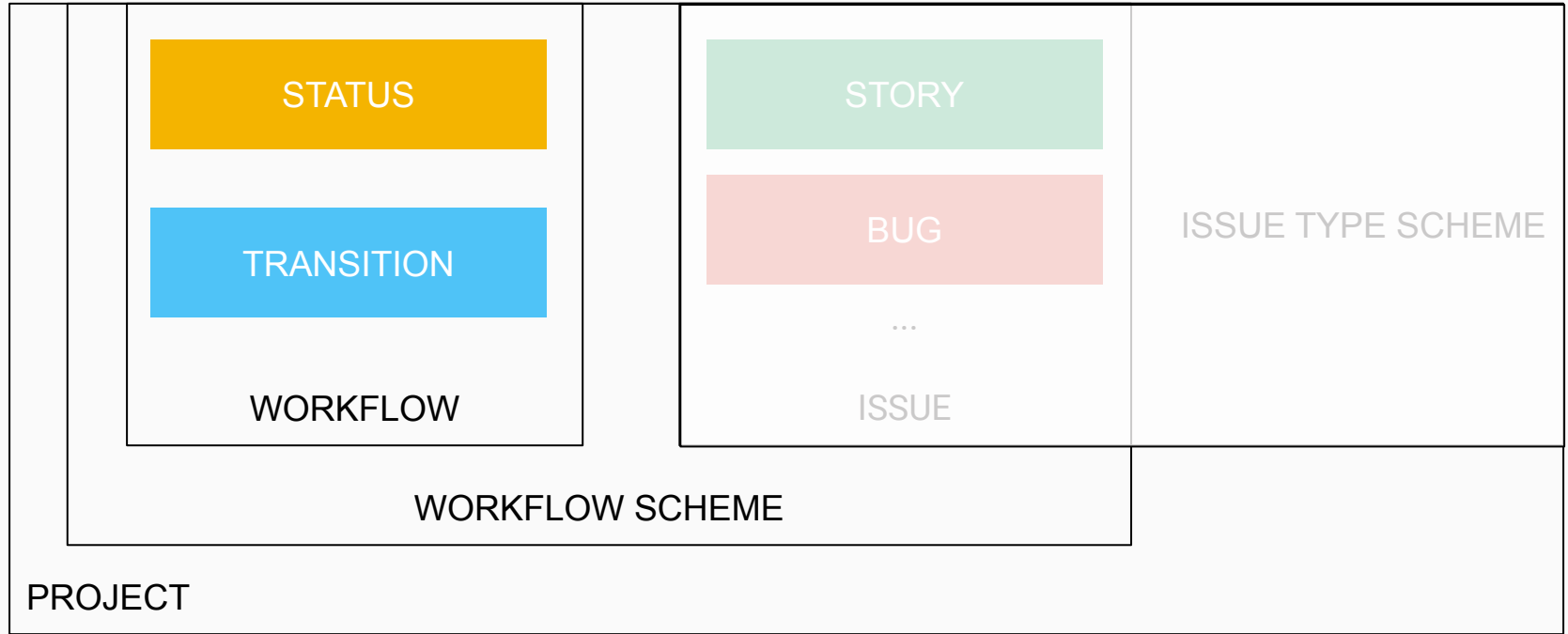
Add Issue Type Scheme



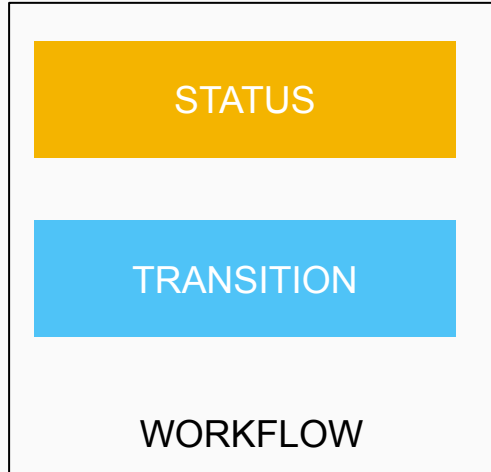
An issue type scheme determines which issue types will be available to a set of projects. It also allows to specify the order in which the issue types are presented in the user interface.

Name	Options	Projects	Actions
Default Issue Type Scheme Default issue type scheme is the list of global issue types. All newly created issue types will automatically be added to this scheme.	<ul style="list-style-type: none"> Epic Change Request Story Task Sub-task Bug Technical Debt	Global (all unconfigured projects)	Edit Associate Copy
SCR: Scrum Issue Type Scheme	<ul style="list-style-type: none"> Task Sub-task Story (Default) Bug Epic Change Request	<ul style="list-style-type: none">Simplified Credit RP	Edit Associate Copy Delete

Workflow



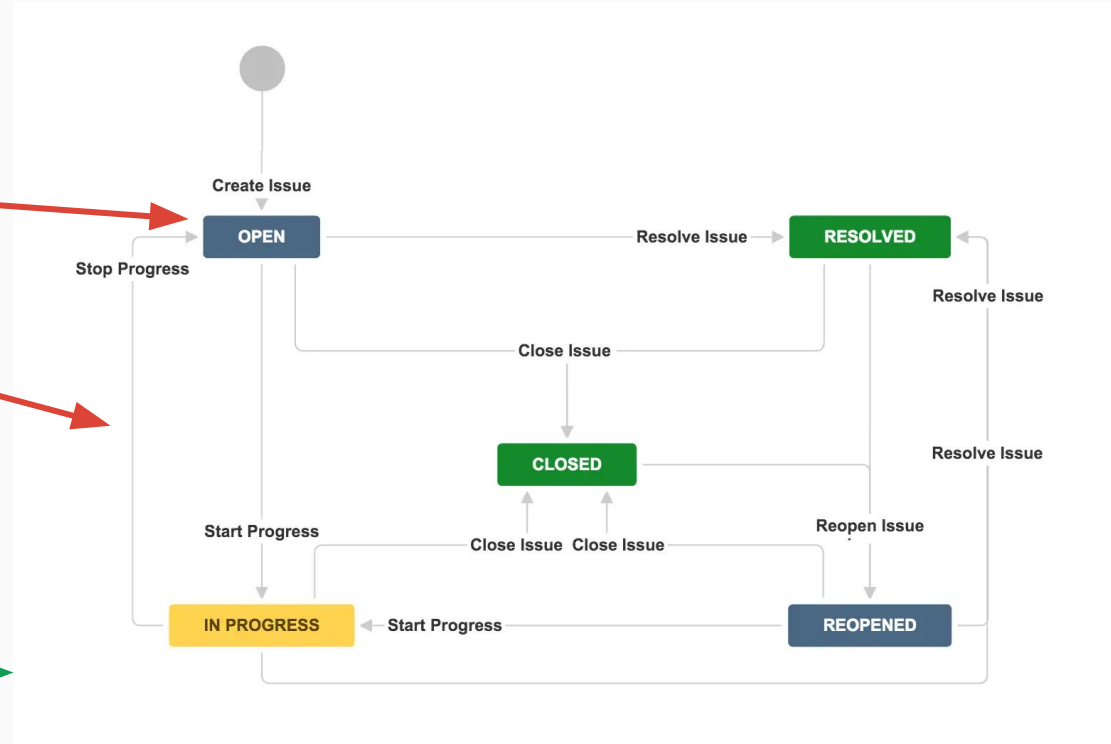
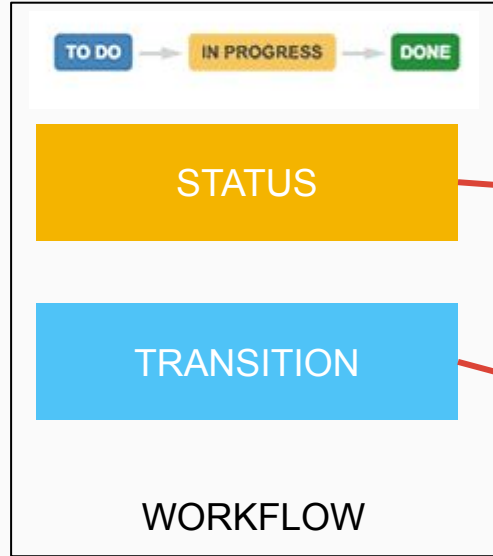
Workflow



A workflow is a pathway like roadways with locations (Status) and one way or two way roads connecting these locations (Transitions) that an issue type can ride on.



How does it look in JIRA

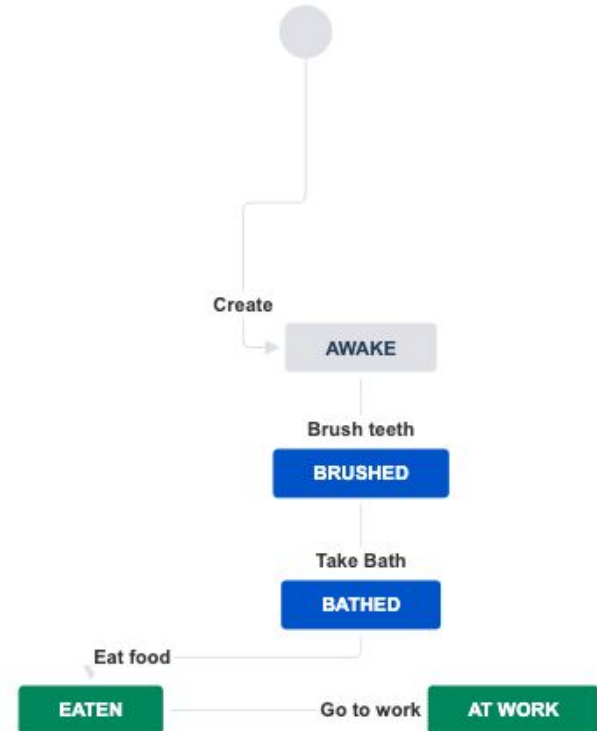


Exercise: Let's create a workflow for an issue type: Human

Our morning workflow

Exercise: Let's create a workflow

Our morning workflow



Quiz?

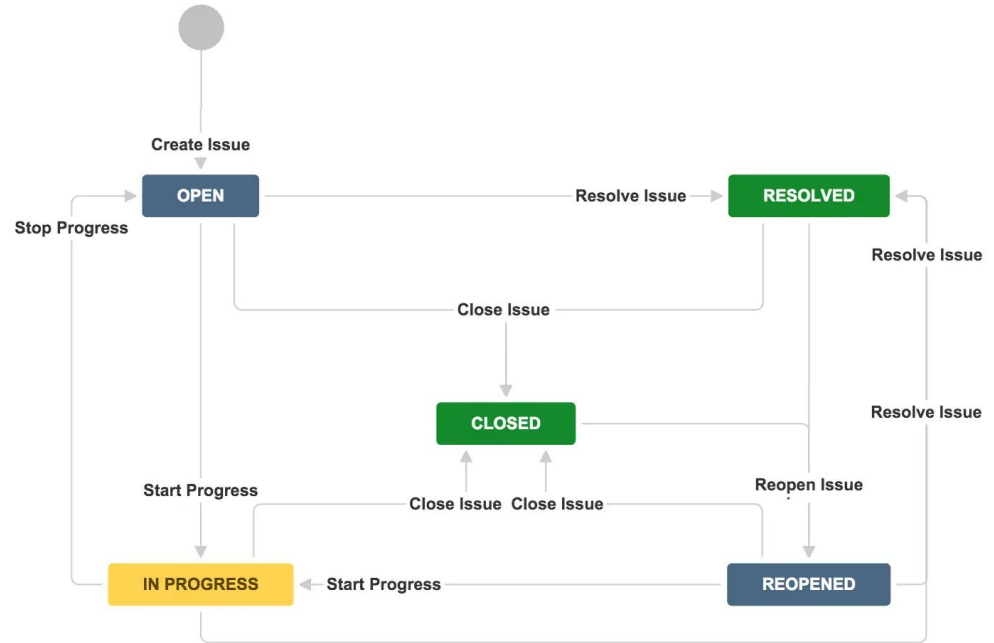
Can you create an issue with resolved status?

Can you move an issue directly from Open to Closed status?

Can you move an issue directly from Closed to Resolved status?

Can you move an issue directly from Open to Reopened status?

Can you move an issue from In progress to Open?



How is a workflow enforced in JIRA?

KN-5696

MPESA Query API POC

EditCommentAssignTo DoIn ProgressWorkflowAdmin

Type:Story

Priority:Medium

Affects versions:None

Components:KOKO Core

Labels:None

Scrum Team:Unallocated

Story Points:4

Epic Link:Payment Integrations

Sprint:Sameer Sprint 6, Sprint 130, Sprint 131

Done

Peer Review

Accepted

Bugs Reported

QA To Do

QA

In Test

Pending Closure

ACCEPTED

View workflow

Done

27

Description

- Validate the transaction ID with Safaricom API
- If successful, then admin can proceed ahead to confirm payment and user's account would be credited based on the response from API.
- This transaction ID would be added to ValidationRequest table in Database to ensure that if Safaricom calls the API later, then duplicate payment is not recorded.
- There would be no provision to alter amount manually, and it would be added as received in the response.
- If unsuccessful, then discard.

PractiTest: Linked Results (Runs)

People

Assignee:

Ethan Oguya

(Inactive)

Assign to me

Reporter:

Alice Morton

Votes:

0

Vote for this issue

Watchers:

3

Start watching this issue

Dates

Created:

29/Jun/19 4:09 PM

Updated:

28/Jan/20 4:29 PM

Resolved:

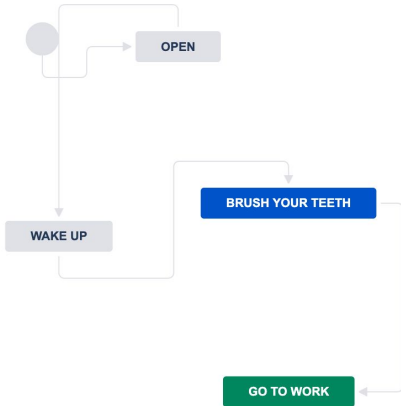
28/Jan/20 4:29 PM

Zendesk Support

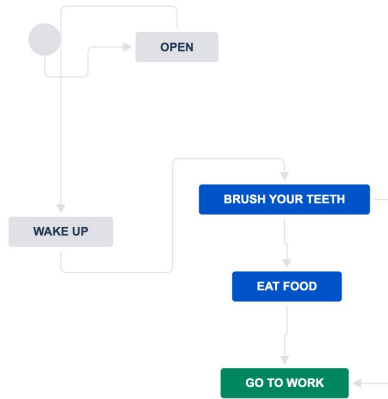
There are no tickets linked to this issue.

A Workflow for everyone

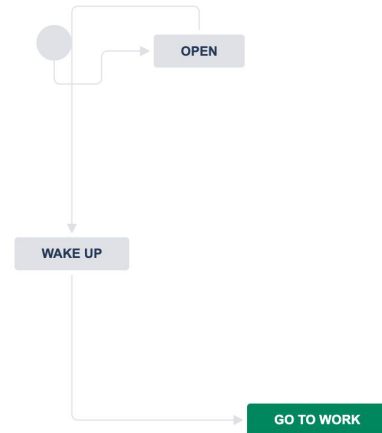
BOYS



GIRLS

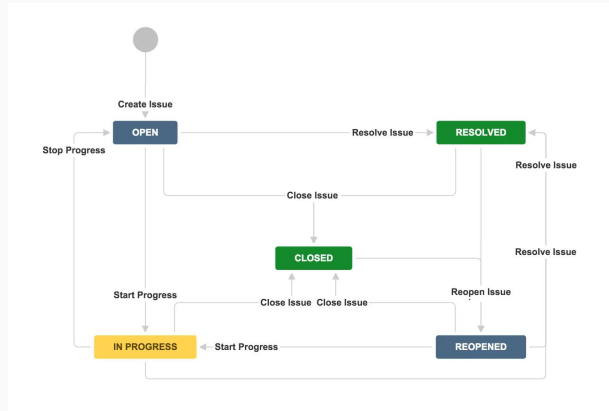


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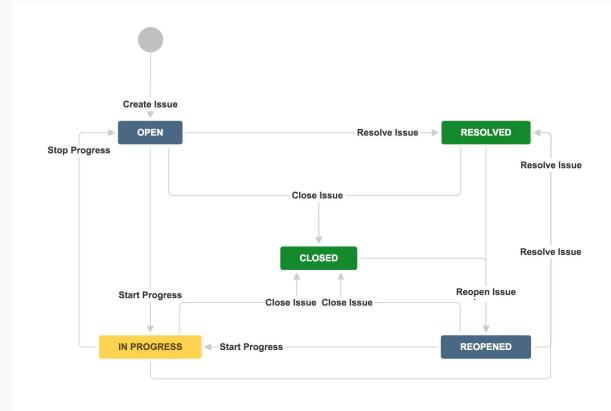


Workflows for each issue type

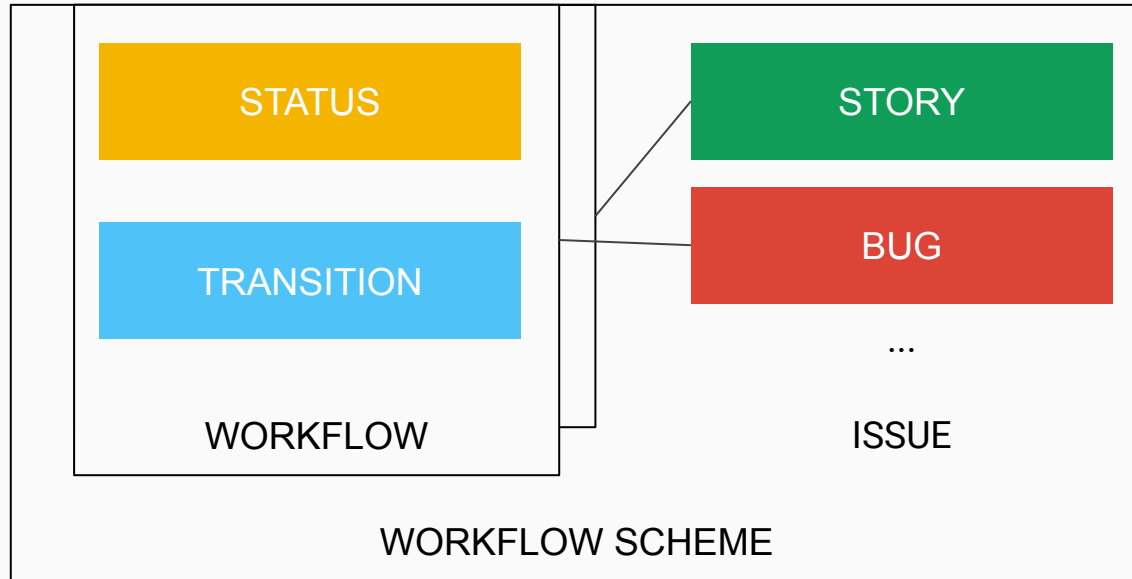
STORY



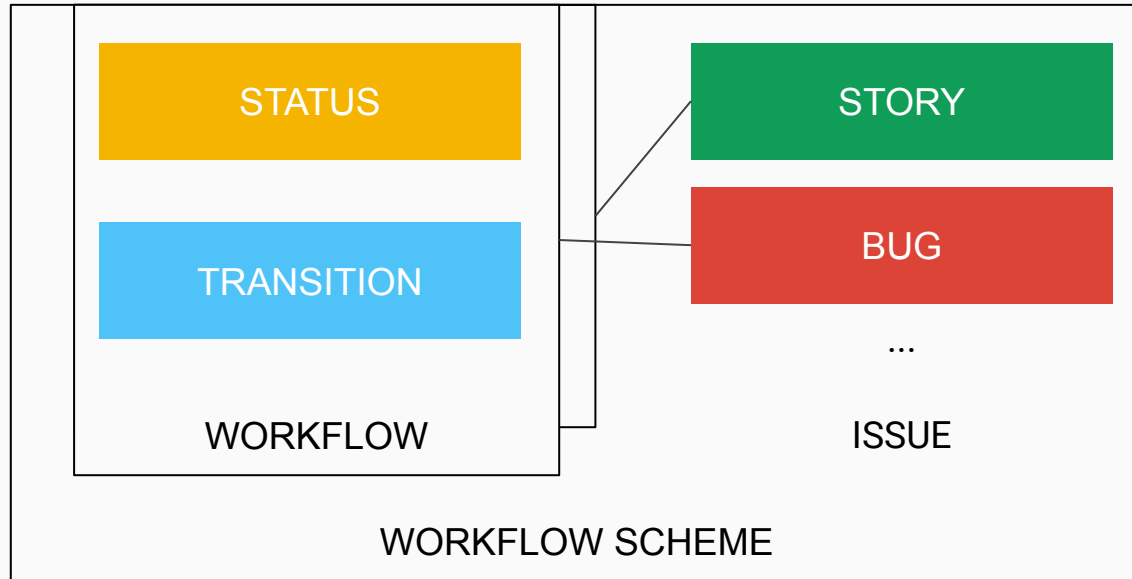
BUG



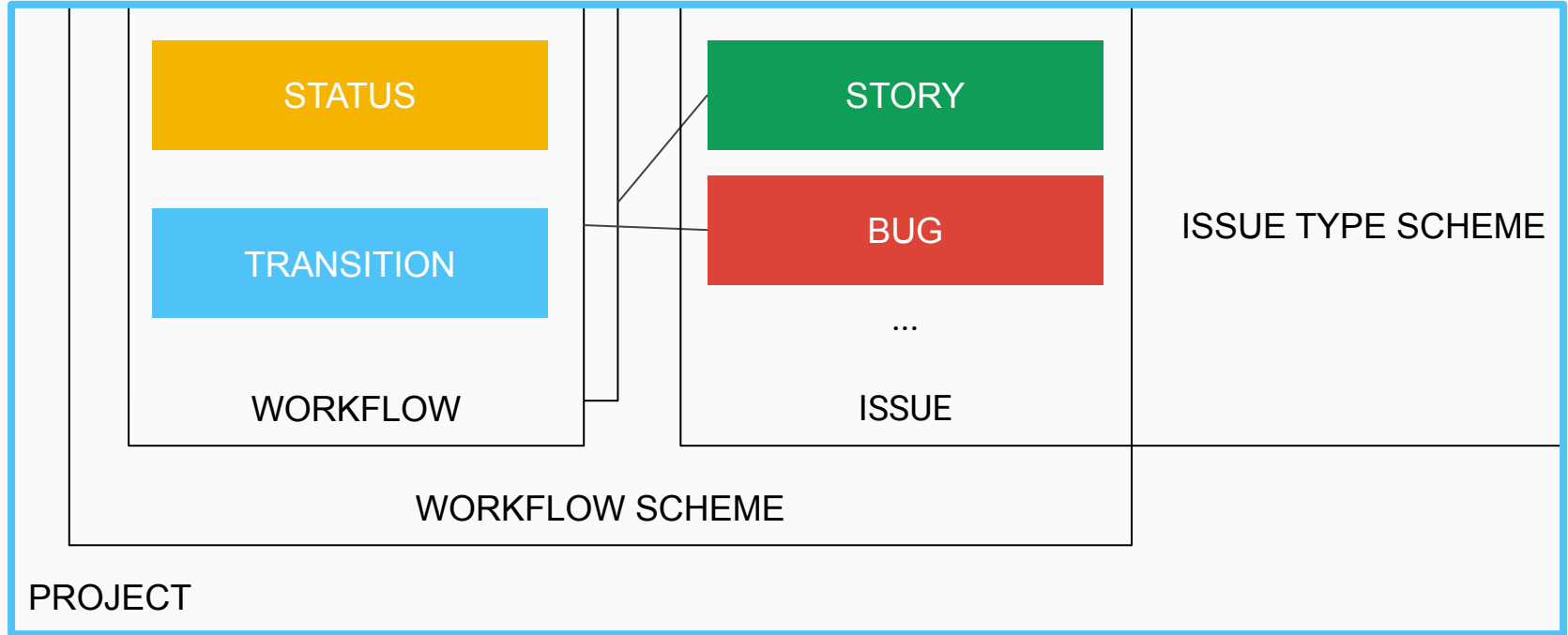
Workflow scheme




Workflow scheme



Workflow scheme



How does it look in JIRA?

 **Simplified Credit RP**
Software project

Back to project

Project settings

Details

People

Summary

Delete project

Issue types

Issue layout

Workflows

Screens

Fields

Versions

Projects / Simplified Credit RP / Project settings

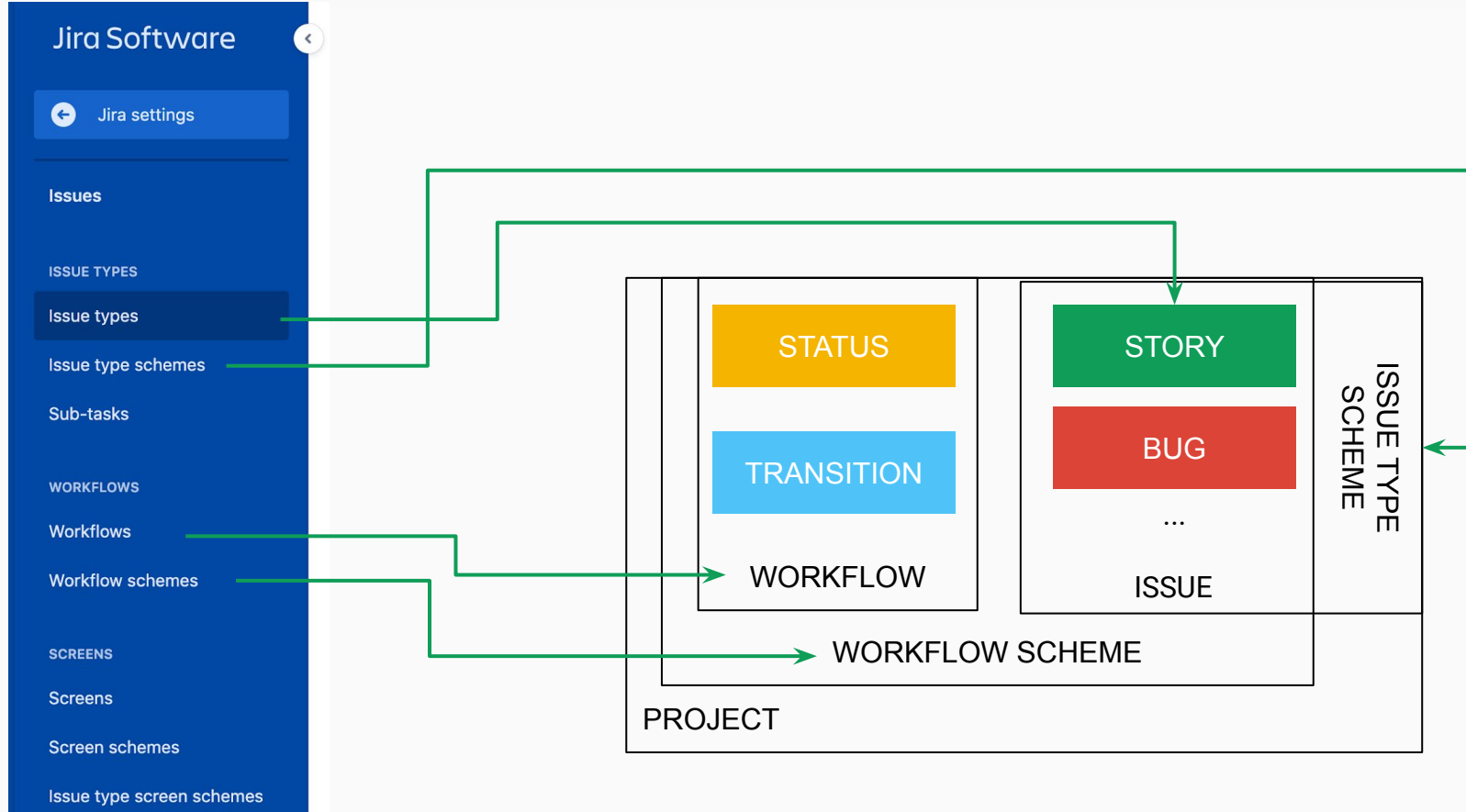
Workflows

SCR: Software Simplified Workflow Scheme

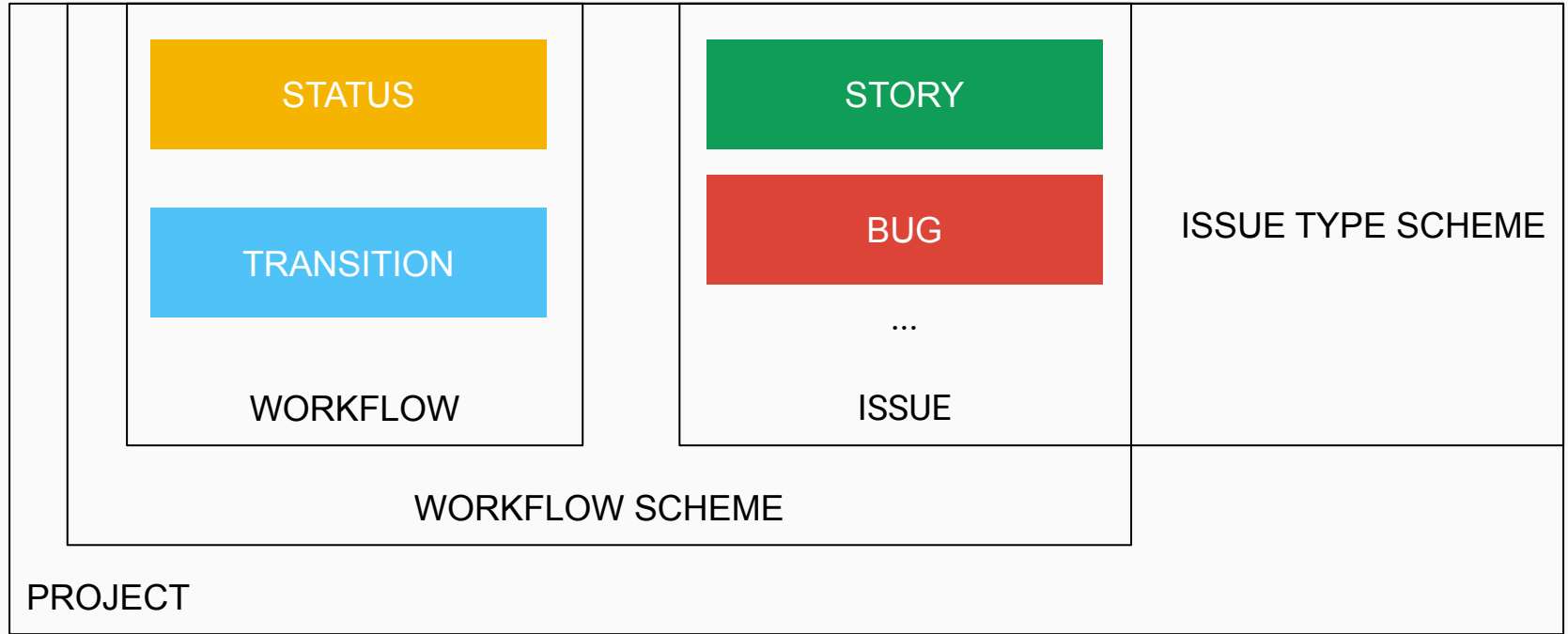
Add Workflow Switch Scheme

Workflow	Issue Types	Actions
Software Simplified Workflow for Project SCR (View as text / diagram)	<div><div>Story</div><div>Bug</div><div>Change Request</div><div>Epic</div><div>Task</div><div>Sub-task</div></div>	<div></div>

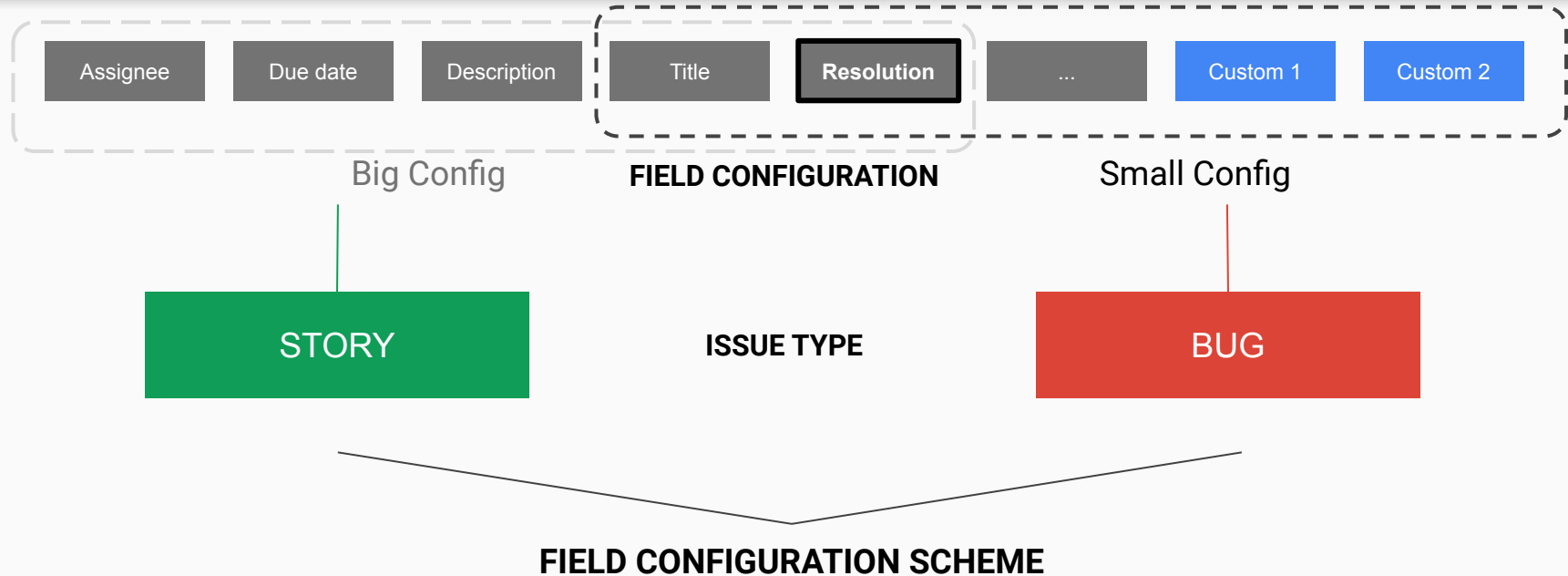
Where do you set it up in JIRA?



Bonus: Fields



Bonus: Fields -> Field Configurations -> Field Configuration Schemes



How does it look in JIRA?

Configure Issue Type Screen Scheme: SCR: Scrum Issue Type Screen Scheme

SHARED BY 1 PROJECT


Associate an issue type with a screen scheme



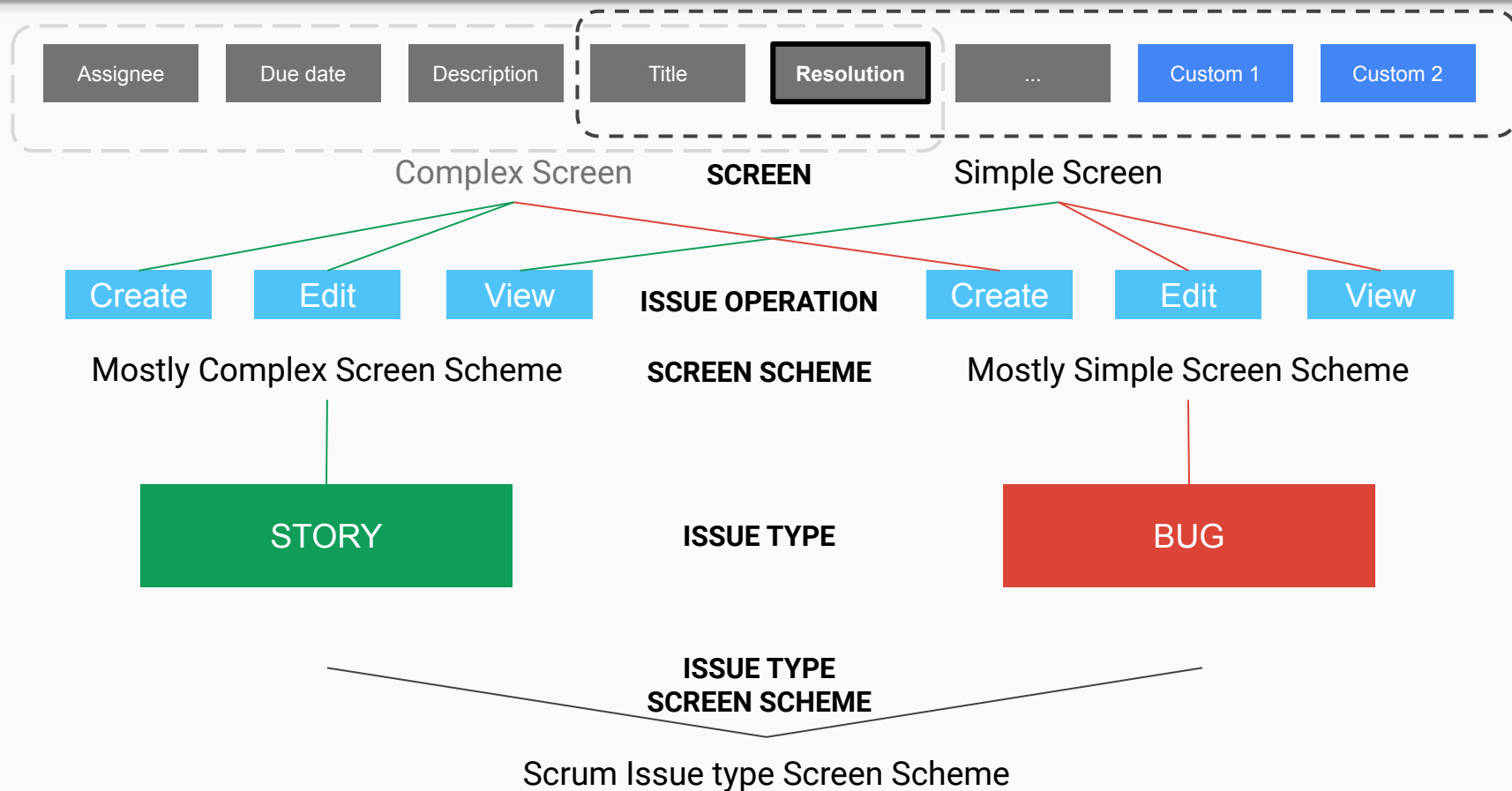
This scheme can be used by one or more projects, the [Screen Scheme](#) specified for each issue type will be applied to the issues in these projects.

The *Default* entry specifies which Screen Scheme will be used for any issue type that has not been explicitly mapped to a screen scheme.

View [all issue type screen schemes](#).

Issue Type	Screen Scheme	Actions
Default Used for all unmapped issue types.	SCR: Scrum Default Screen Scheme	Edit
 Story	SCR: Scrum Default Screen Scheme	Edit Delete
 Bug	SCR: Scrum Bug Screen Scheme	Edit Delete

Bonus: Issue, screen and field associations



How does it look in JIRA?

Configure Issue Type Screen Scheme: SCR: Scrum Issue Type Screen Scheme

SHARED BY 1 PROJECT



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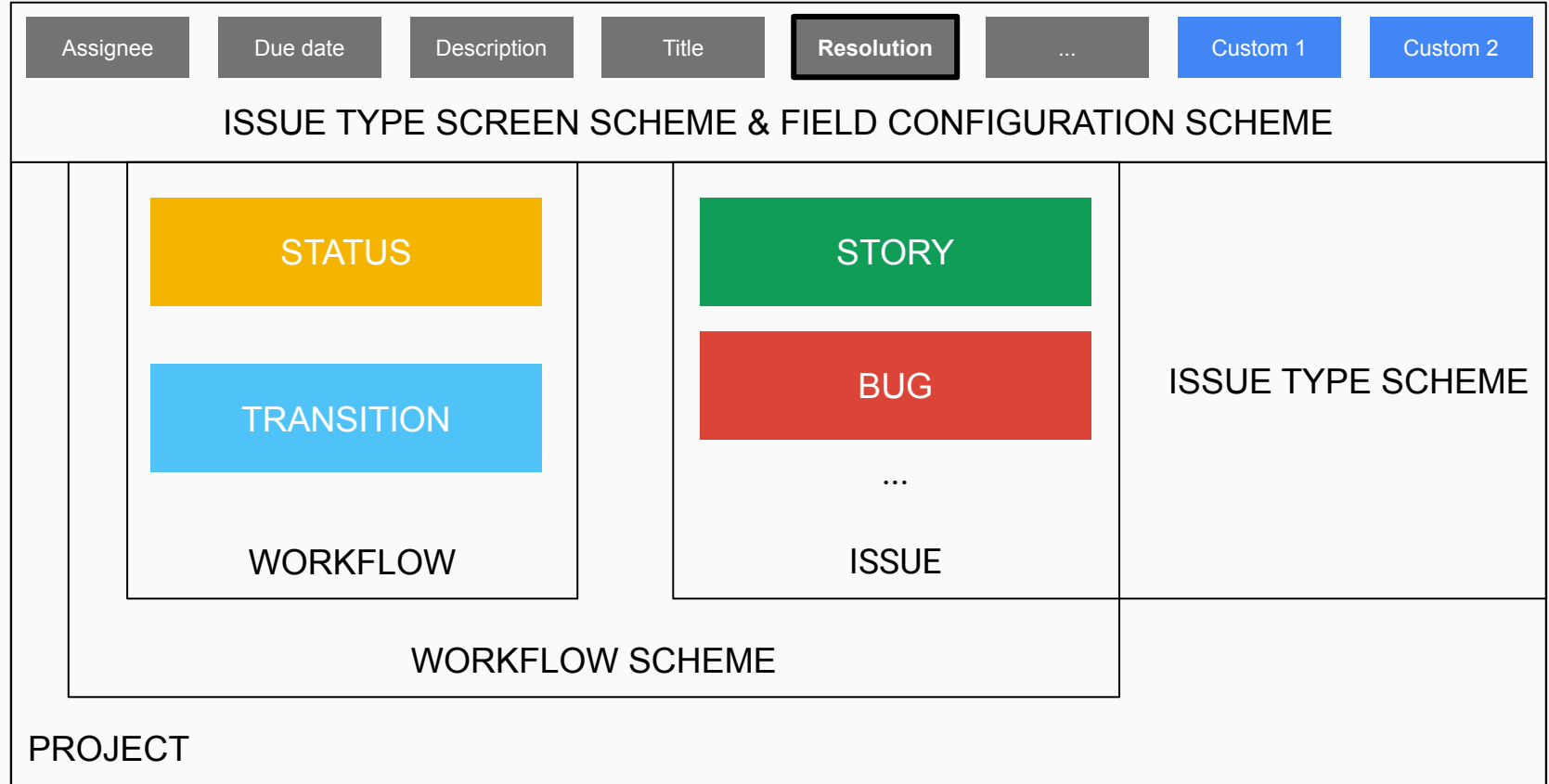
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Full picture



Final point: Resolution field

Assignee

Due date

Description

Title

Resolution

...

Custom 1

Custom 2

KN-5696

MPESA Query API POC

Edit

Comment

Assign

To Do

In Progress

Workflow

Admin

Type:

Story

Status:

ACCEPTED

Priority:

Medium

Resolution:

Done

Affects versions:

None

Fix versions:

R27

Components:

KOKO Core

Labels:

None

Scrum Team:

Unallocated

Story Points:

4

Epic Link:

Payment Integrations

Sprint:

Sameer Sprint 6, Sprint 130, Sprint 131

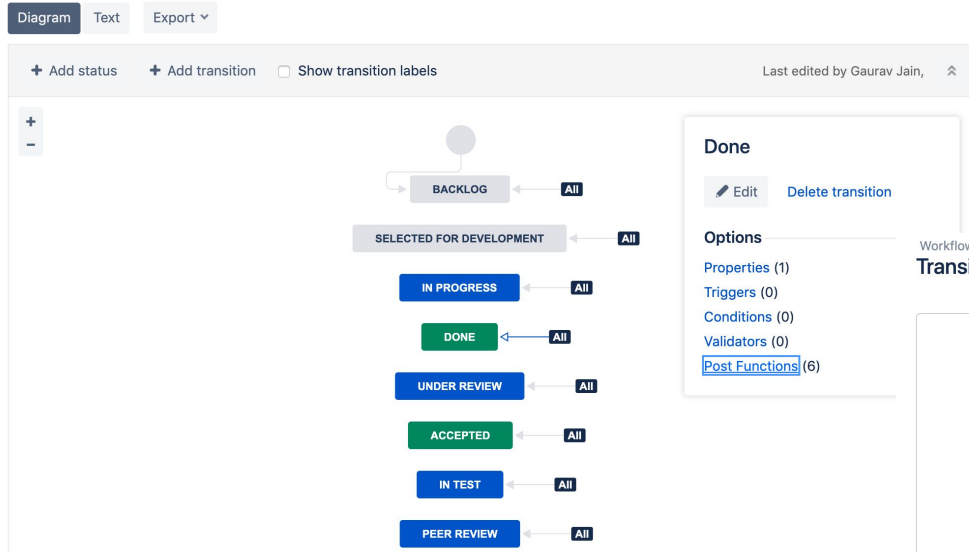
Description

- Validate the transaction ID with Safaricom API
- If successful, then admin can proceed ahead to confirm payment and user's account

PROJECT

Issue Type Scheme

Resolution ends the lifecycle of an issue



Workflows / Software Simplified Workflow for Project KQ (Draft)

Transition: Done

Edit View Properties ?



Transition is available to **ALL** steps in the workflow.

Screen: None - it will happen instantly

Triggers 0 Conditions 0 Validators 0 Post Functions 6

The following will be processed after the transition occurs

[Add post function](#)

1. The **Resolution** of the issue will be set to **Done**.
2. Set issue status to the linked status of the destination workflow step.

Questions!



Workflow schemes

- <https://www.youtube.com/watch?v=bPHTAxycL8Q>

Screen schemes

- <https://www.youtube.com/watch?v=kN3F5IbwUW0>