JIRA Essentials

Setup for success

Karan Rai

Roadmap

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

Today

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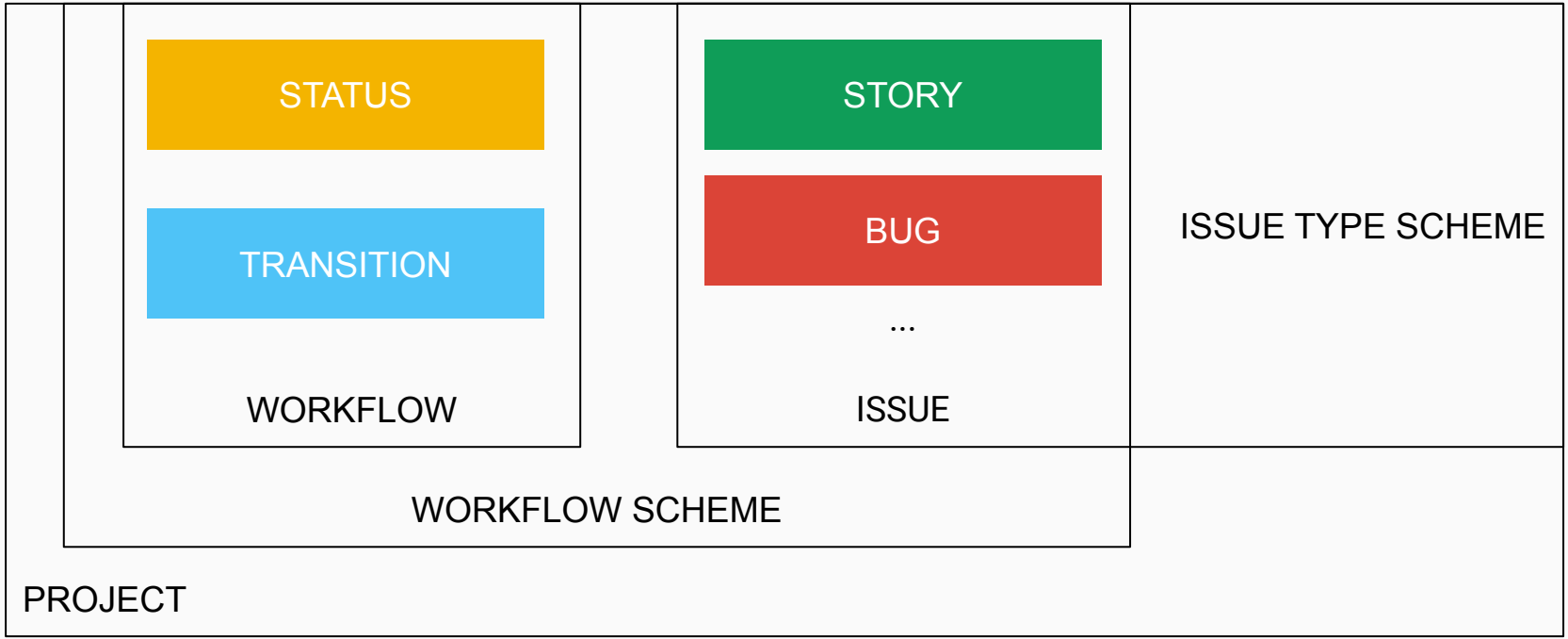
Concepts


STATUS
TRANSITION
WORKFLOW
STORY
BUG
...
ISSUE
ISSUE TYPE SCHEME
WORKFLOW SCHEME
PROJECT

ISSUE TYPES

An Issue is a TODO!

What are the types of TODOs you plan to do?

STORY

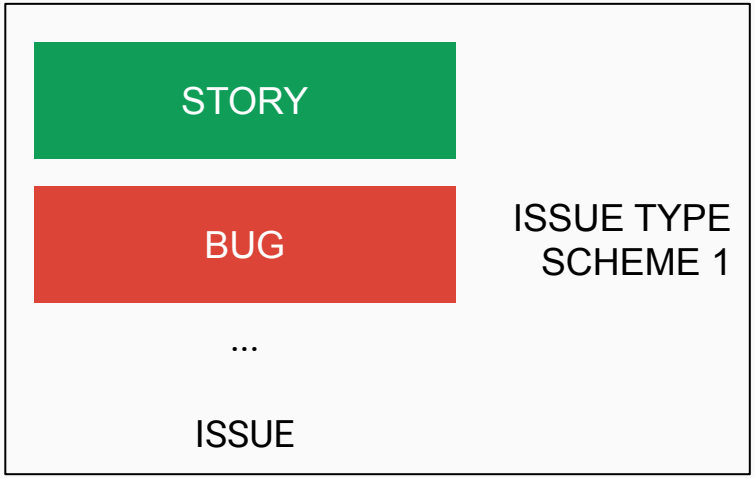
BUG

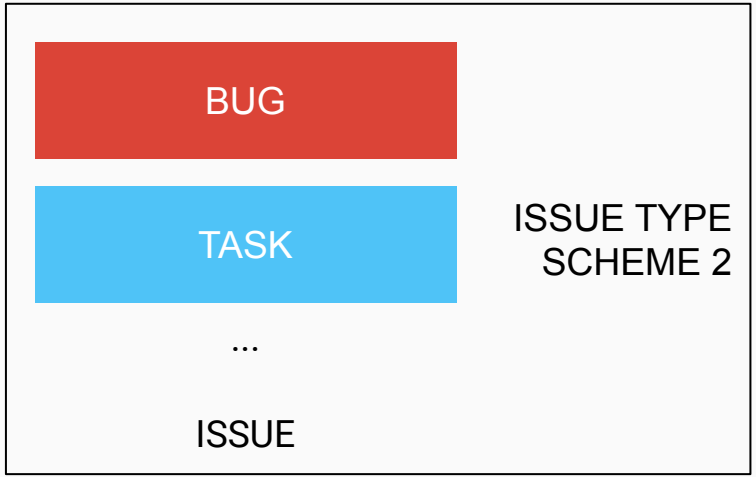
...

ISSUE

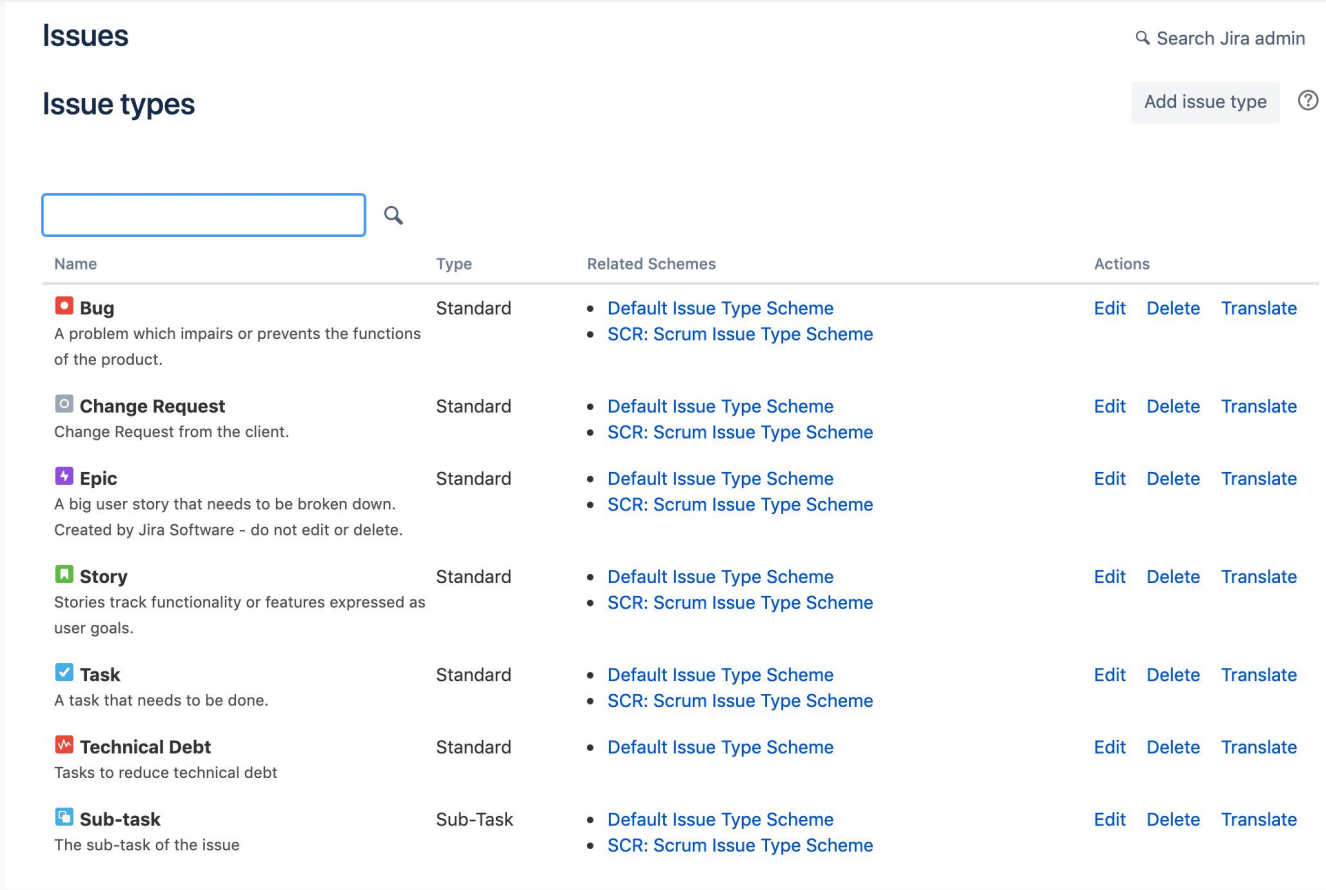
ISSUE TYPE SCHEME

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





How does it look like in JIRA



ISSUE TYPE SCHEME

Issues

Search Jira admin

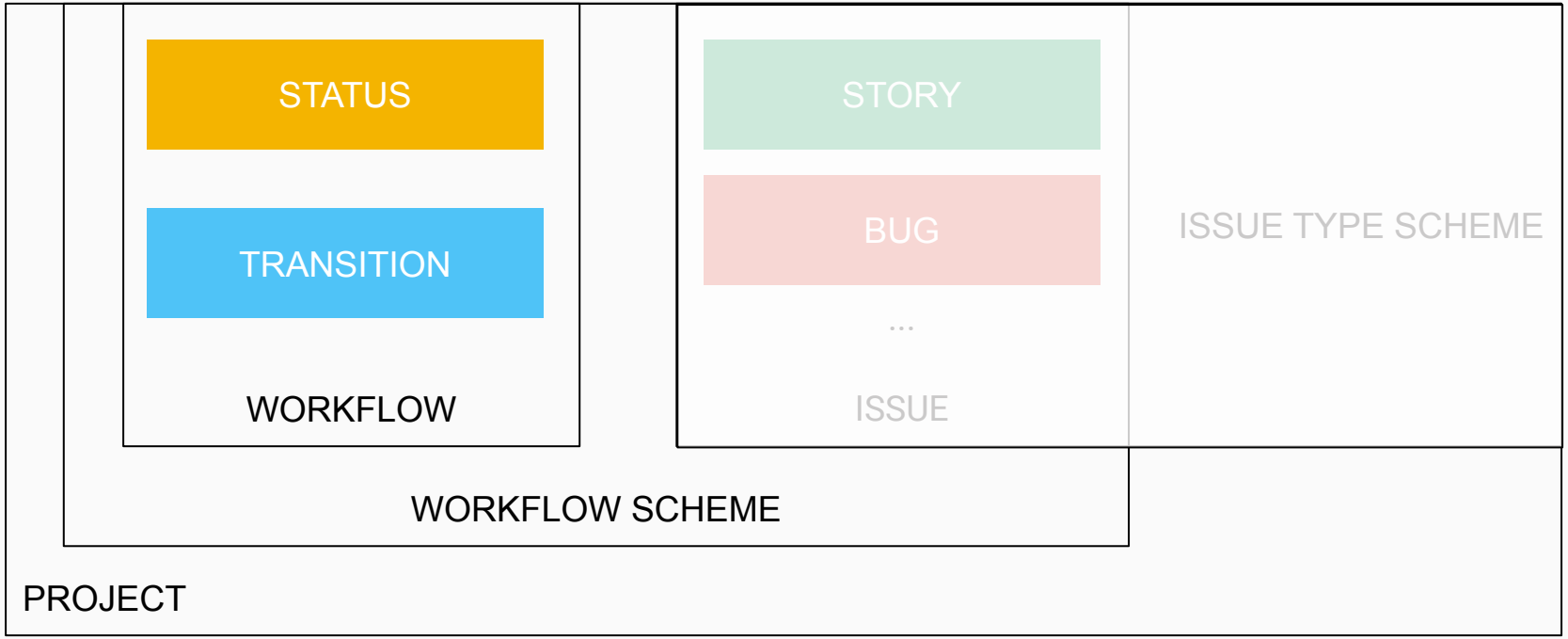
Issue type schemes

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.	Epic Change Request Story Task Sub-task Bug Technical Debt	Global (all unconfigured projects)	Edit Associate Copy
SCR: Scrum Issue Type Scheme	Task Sub-task Story (Default) Bug Epic Change Request	• Simplified Credit RP	Edit Associate Copy Delete

Workflow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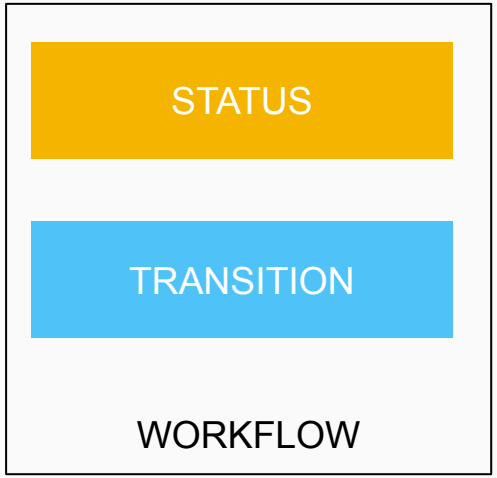
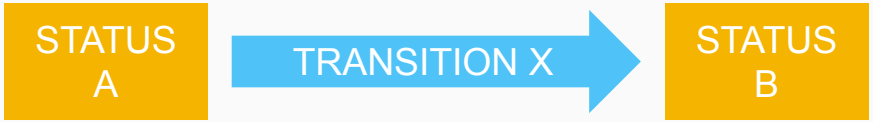
Workflow



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.



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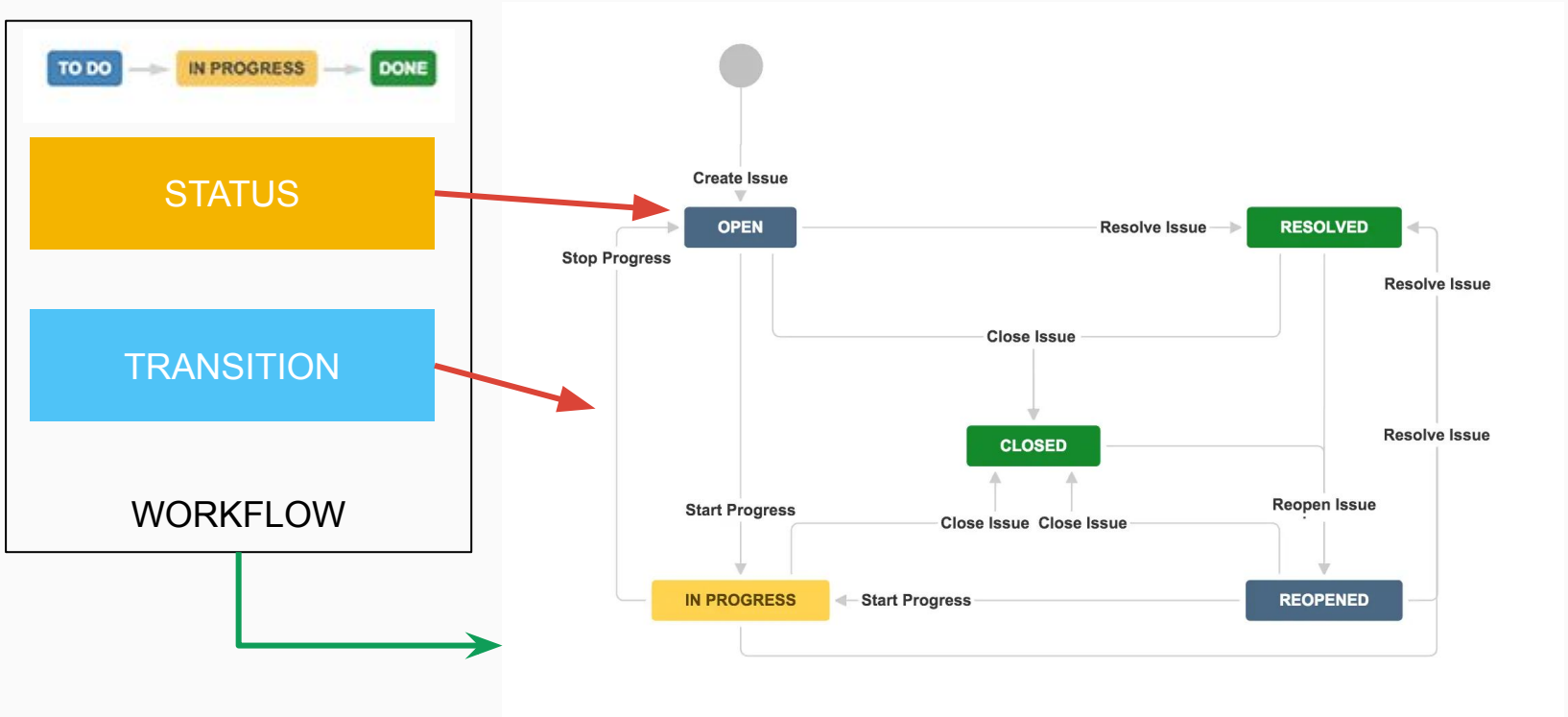
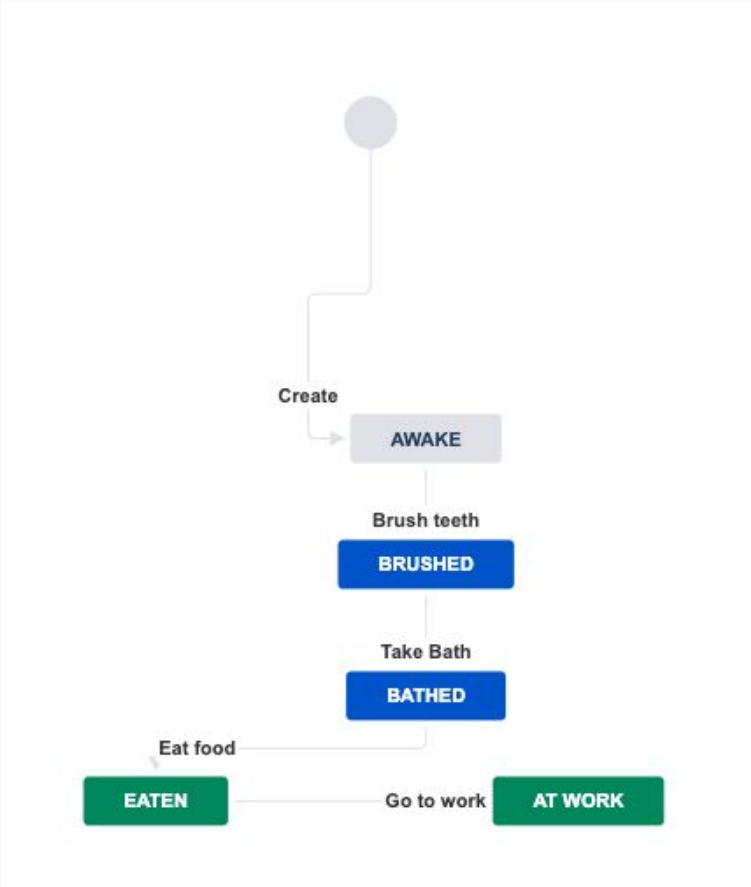


Exercise: Let’s create a workflow for an issue type: Human

Our morning workflow

Exercise: Let’s create a workflow

Our morning workflow



Quiz?

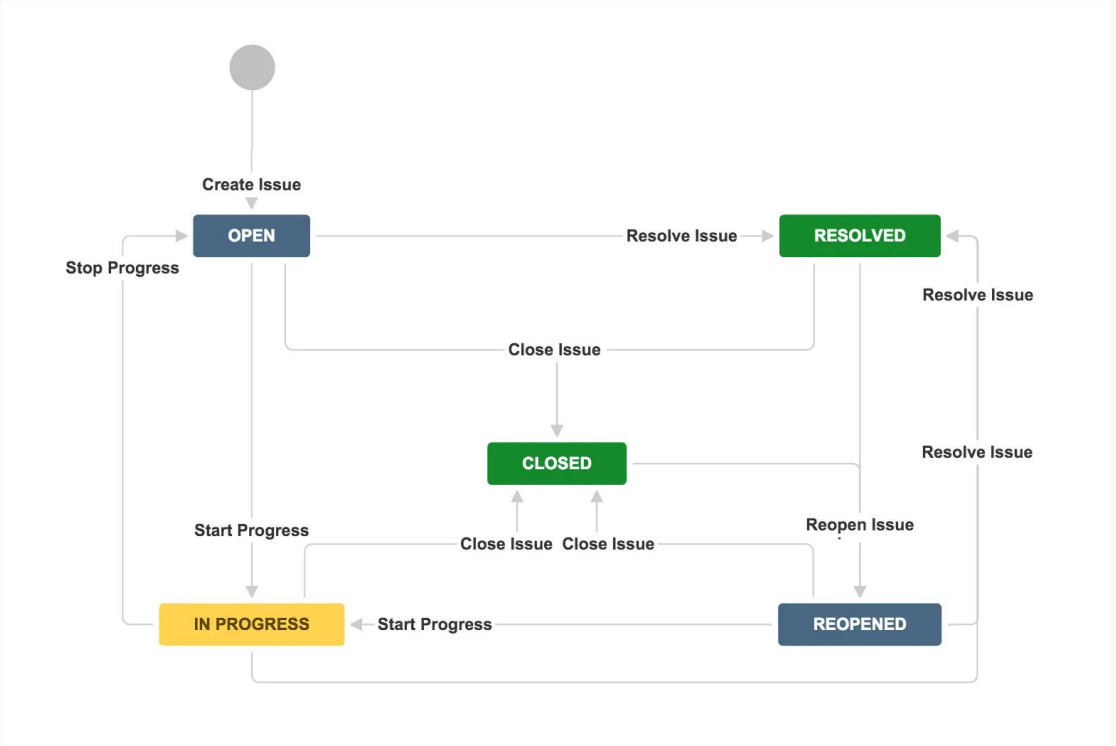
Can you create an issue with resolved status?

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

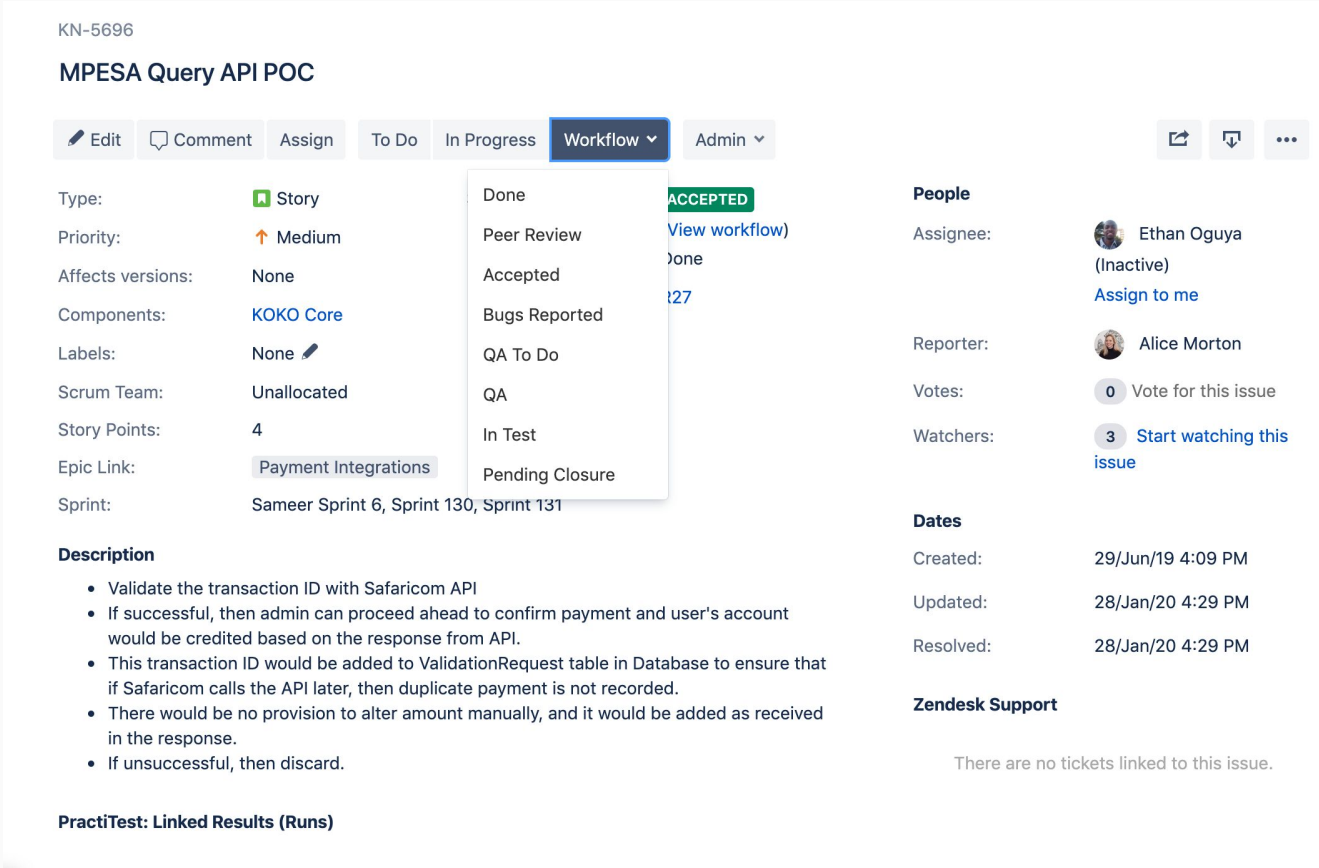
Can you move an issue directly from Closed to Resolved status?

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

Can you move an issue from In progress to Open?

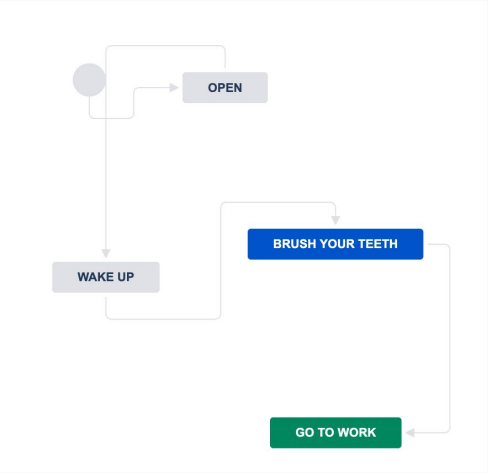


How is a workflow enforced in JIRA?

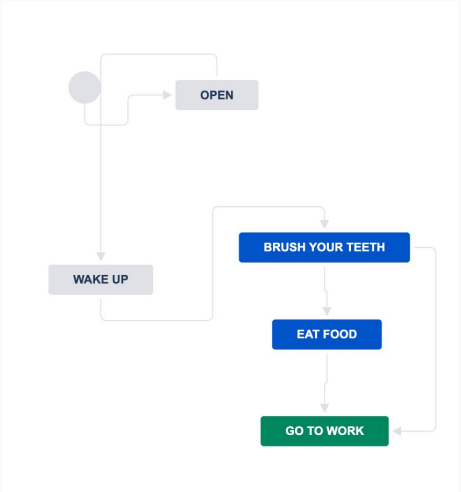


A Workflow for everyone

BOYS



GIRLS



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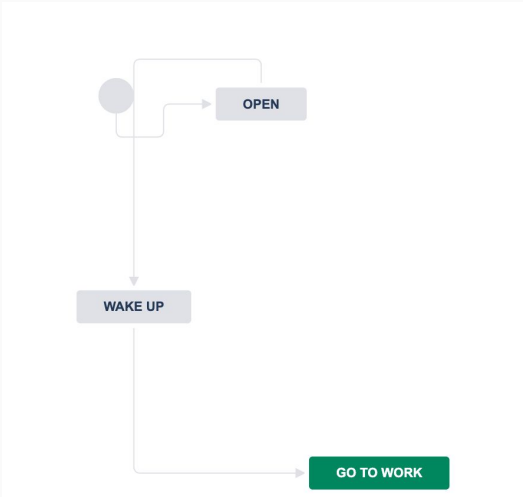
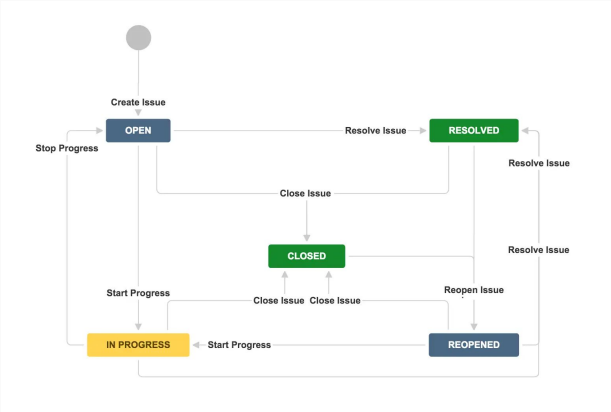
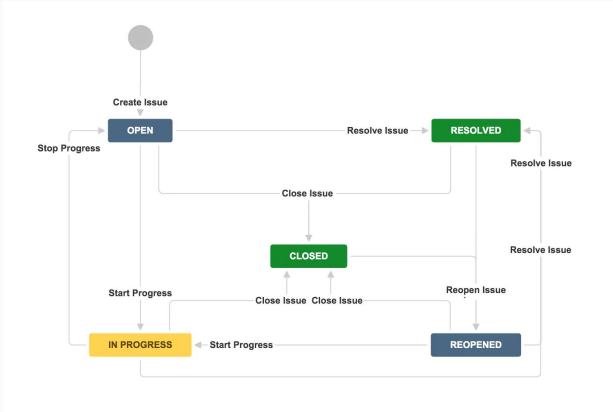


Workflows for each issue type

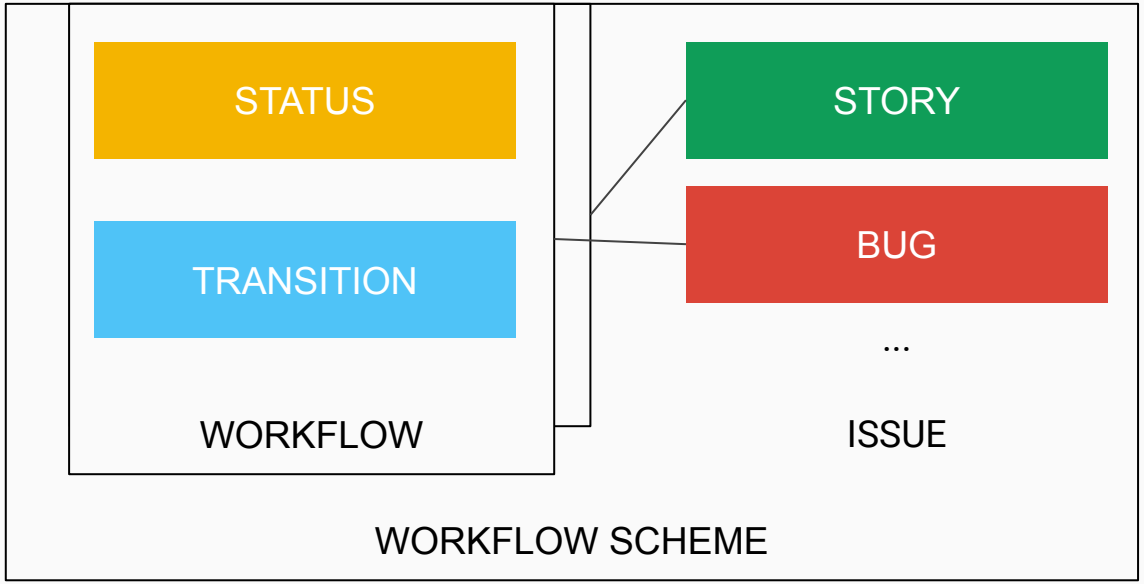
STORY



BUG



Workflow scheme



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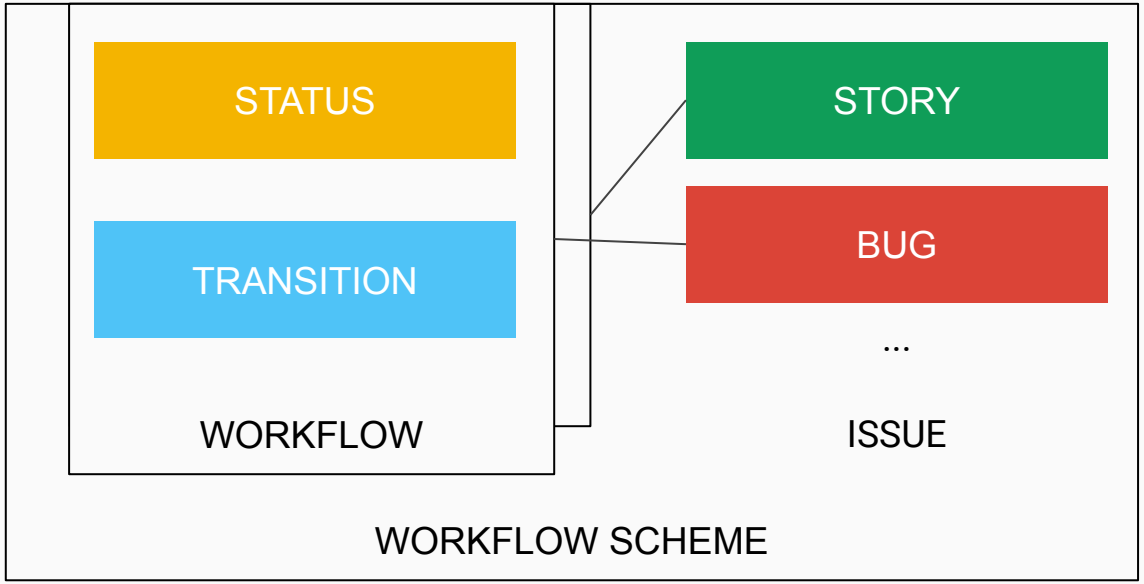

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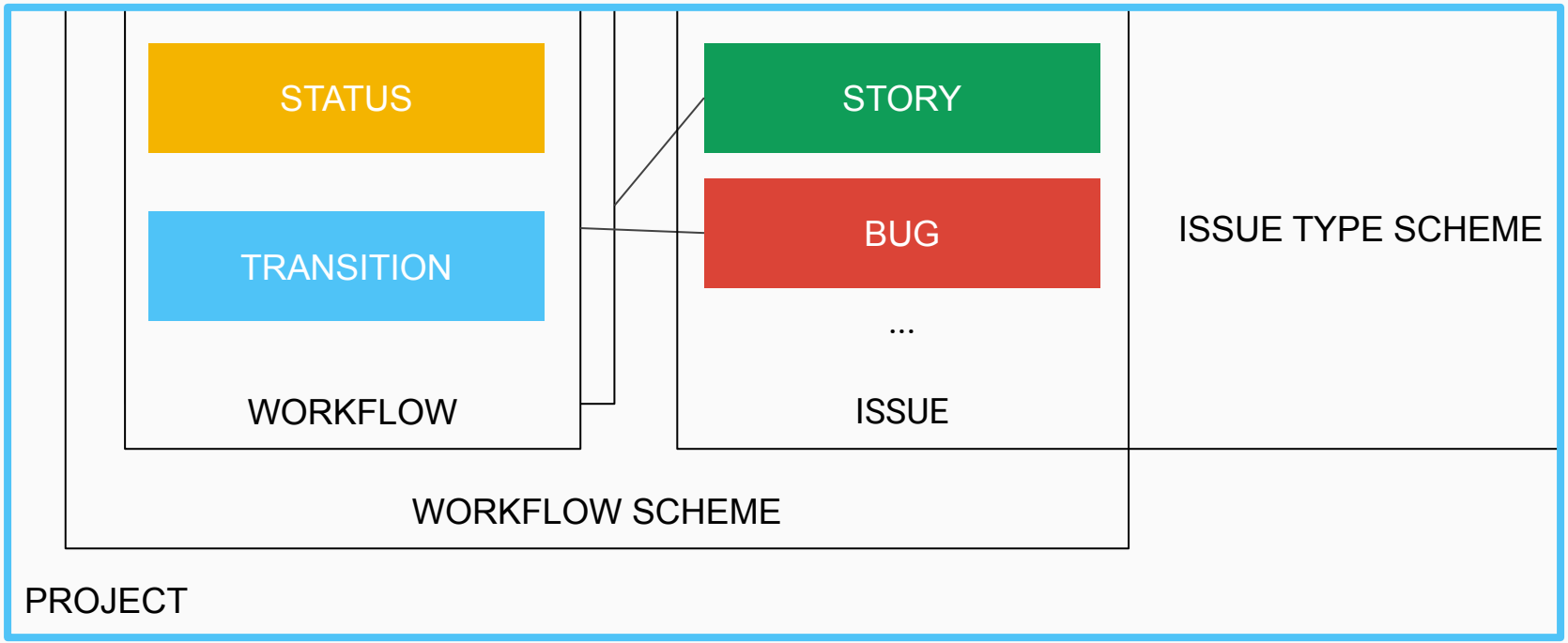

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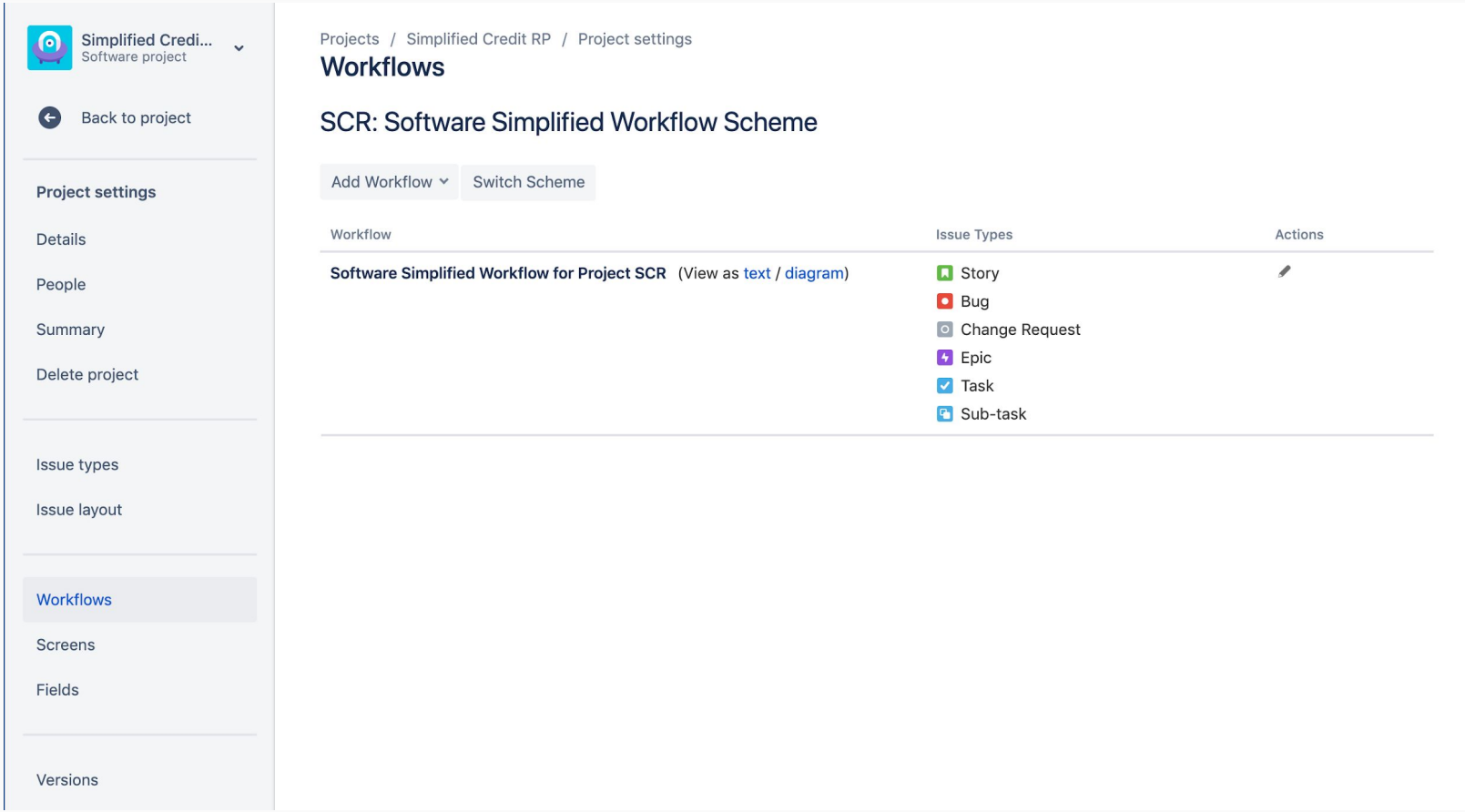
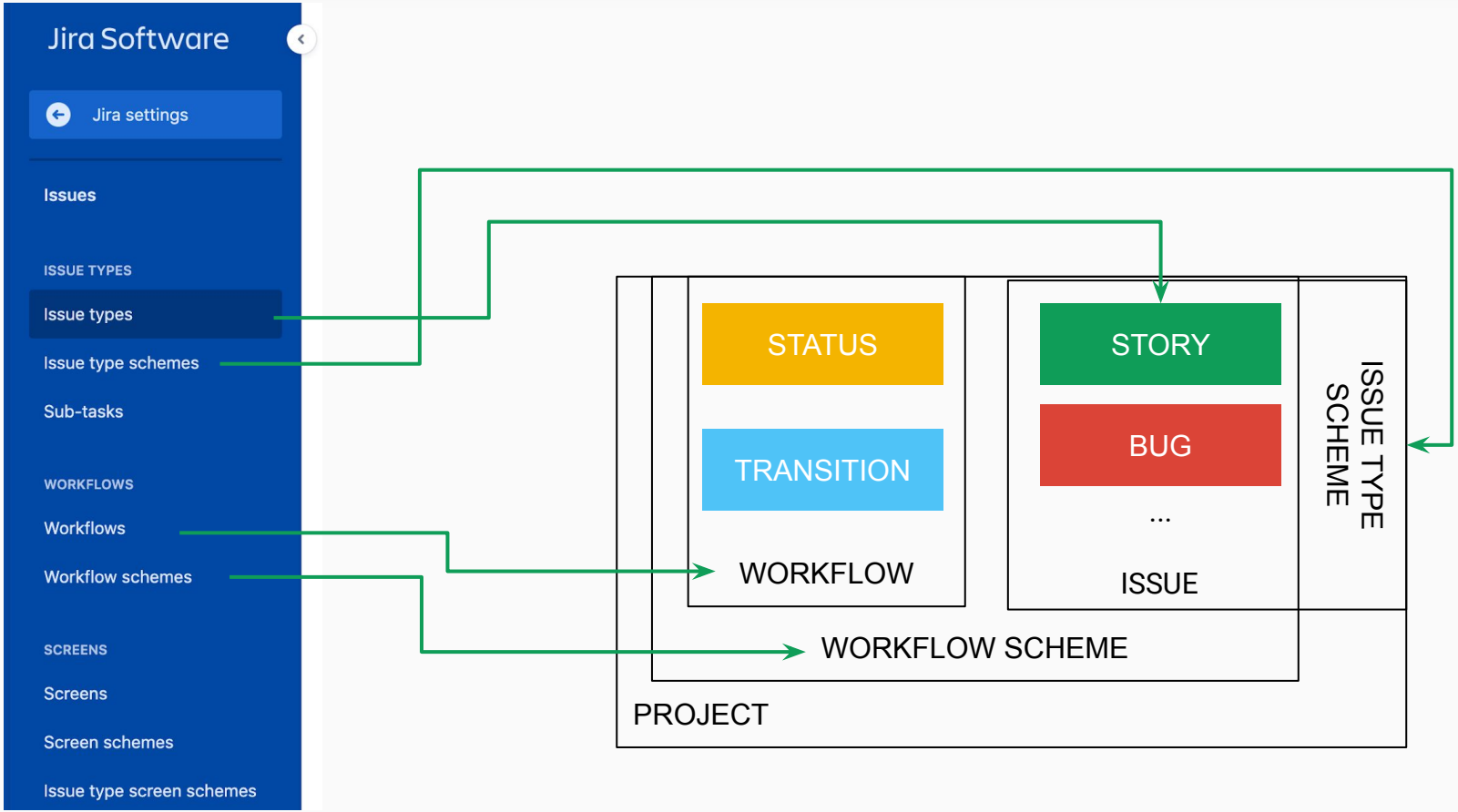
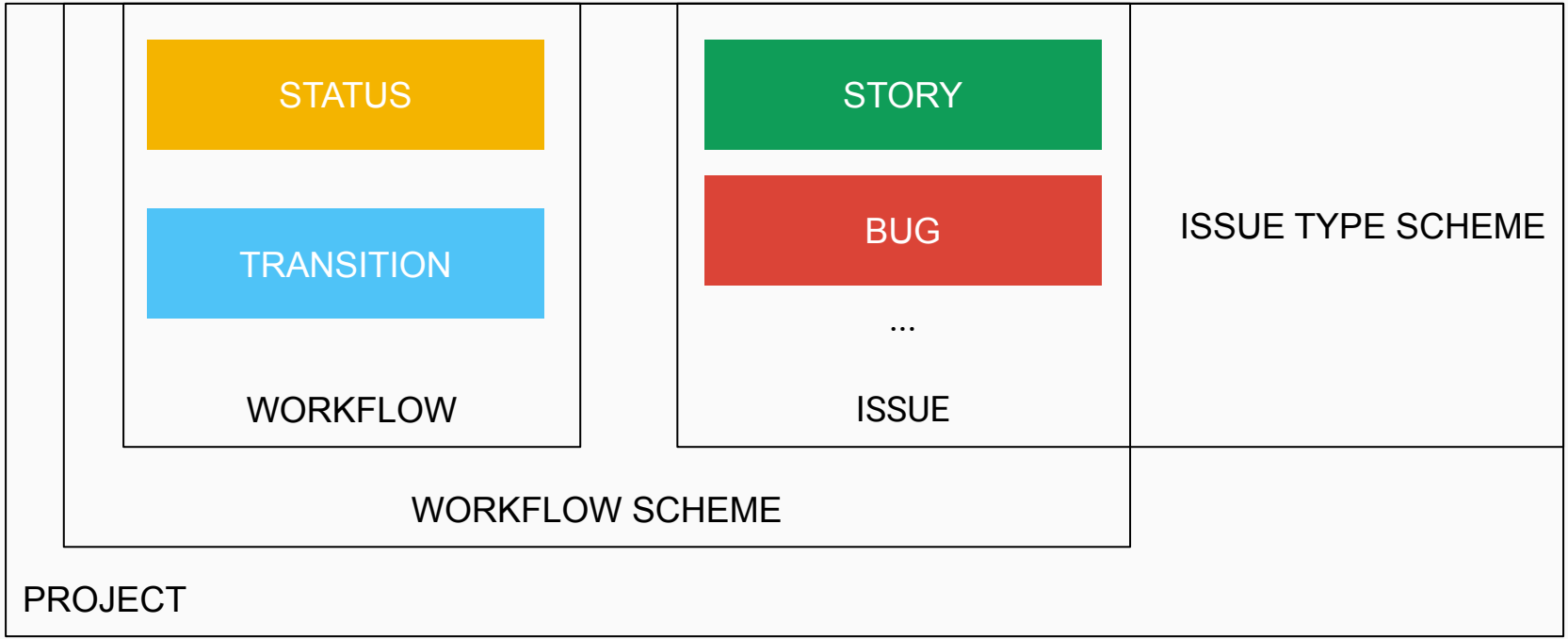


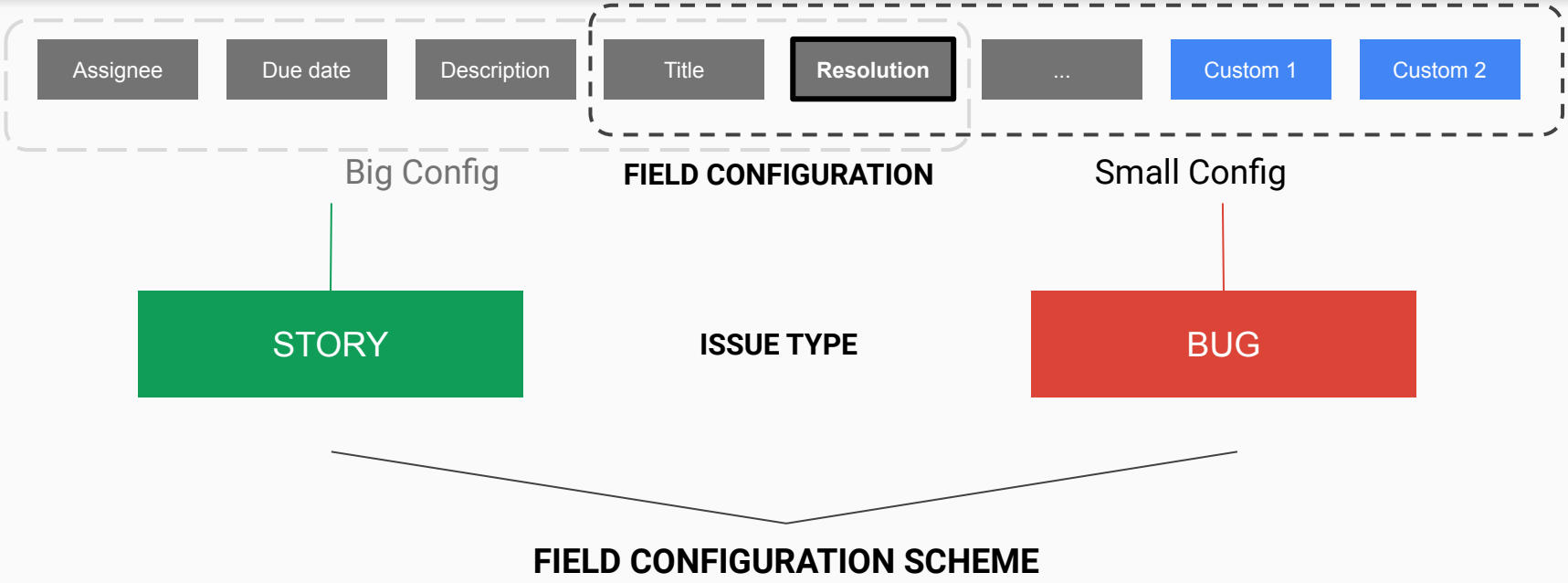
Where do you set it up in JIRA?



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

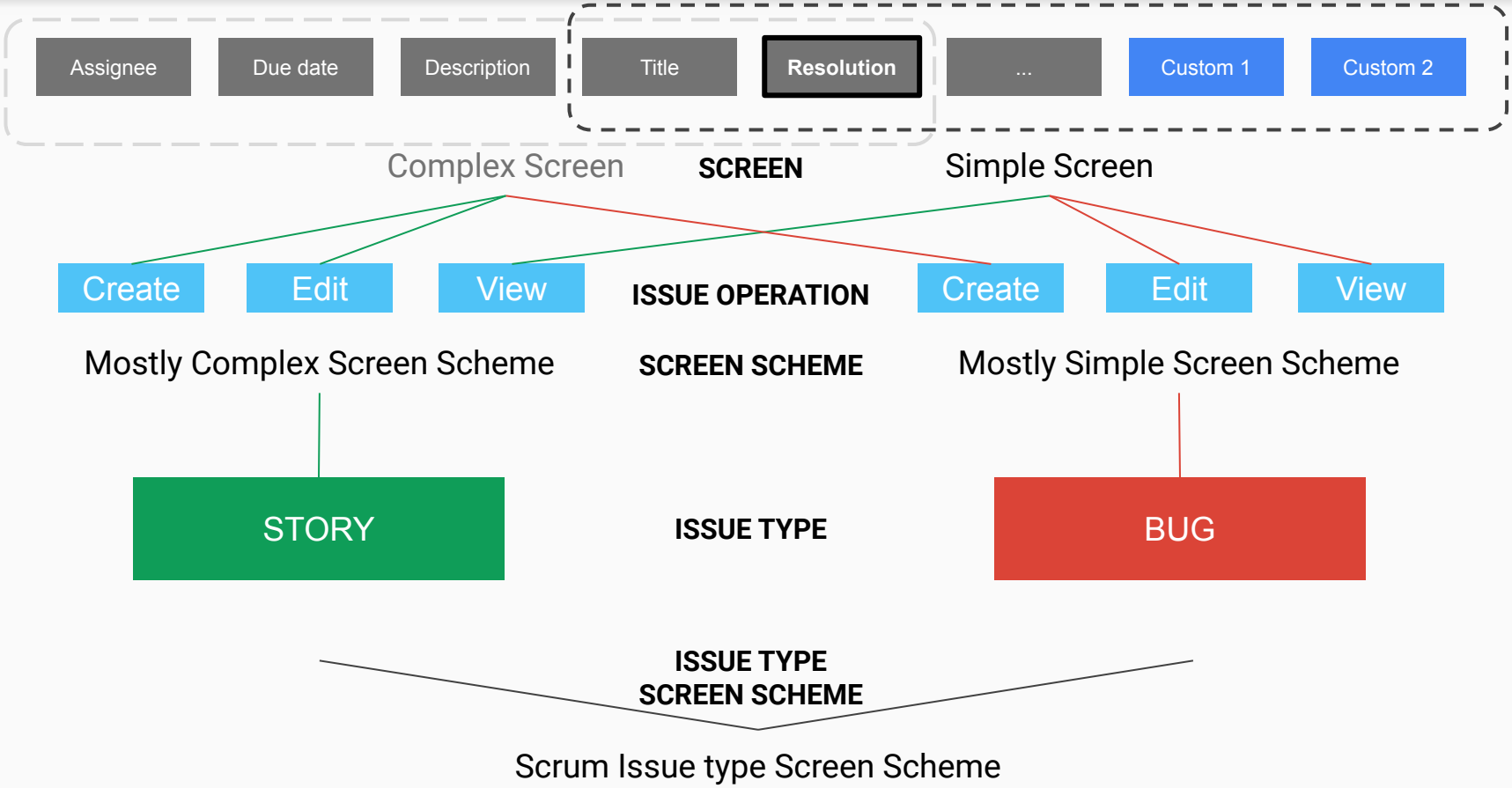
This scheme can be used by one or more projects, the Screen Scheme specified for each issue type will be applied to the issues in these projects.

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



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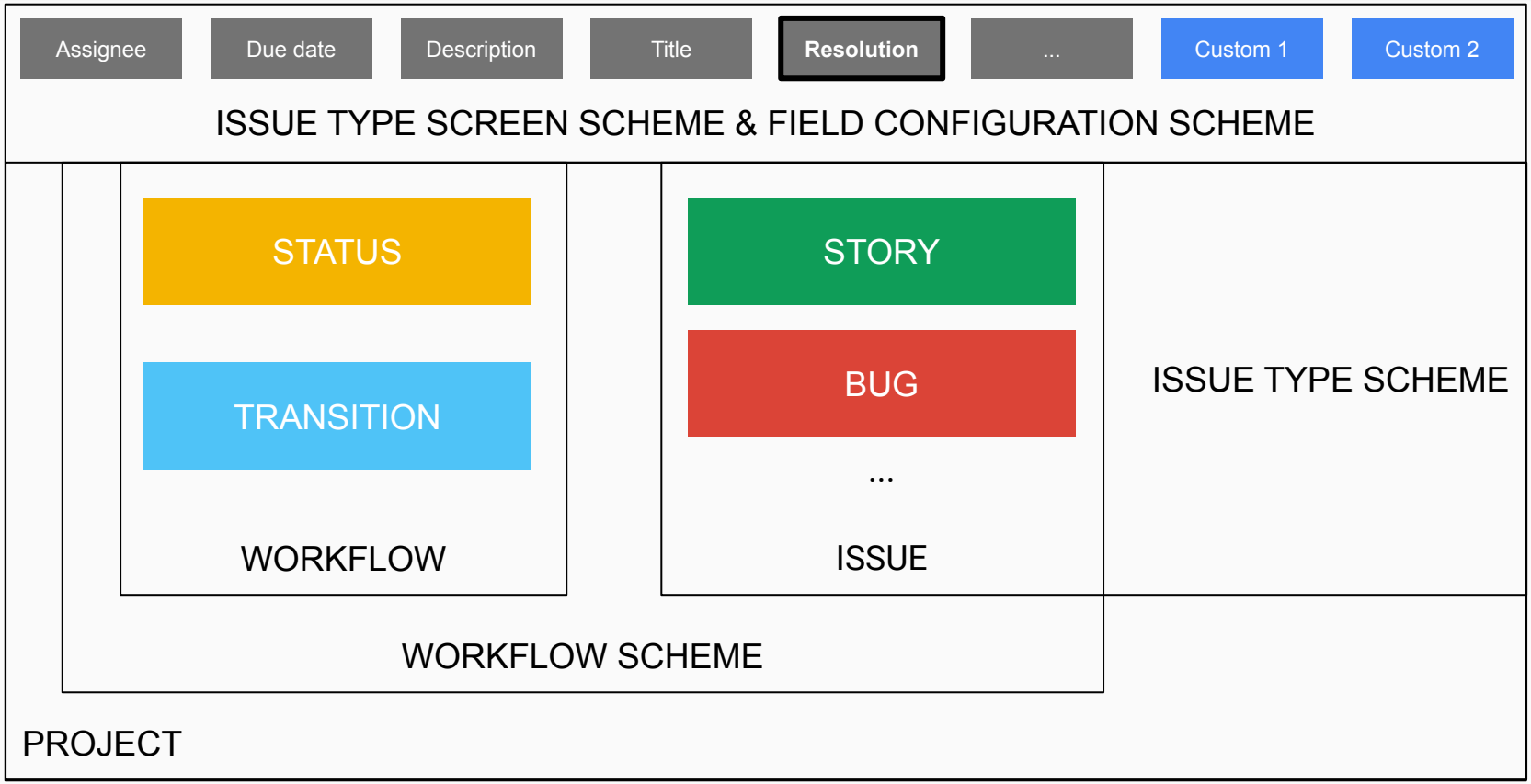
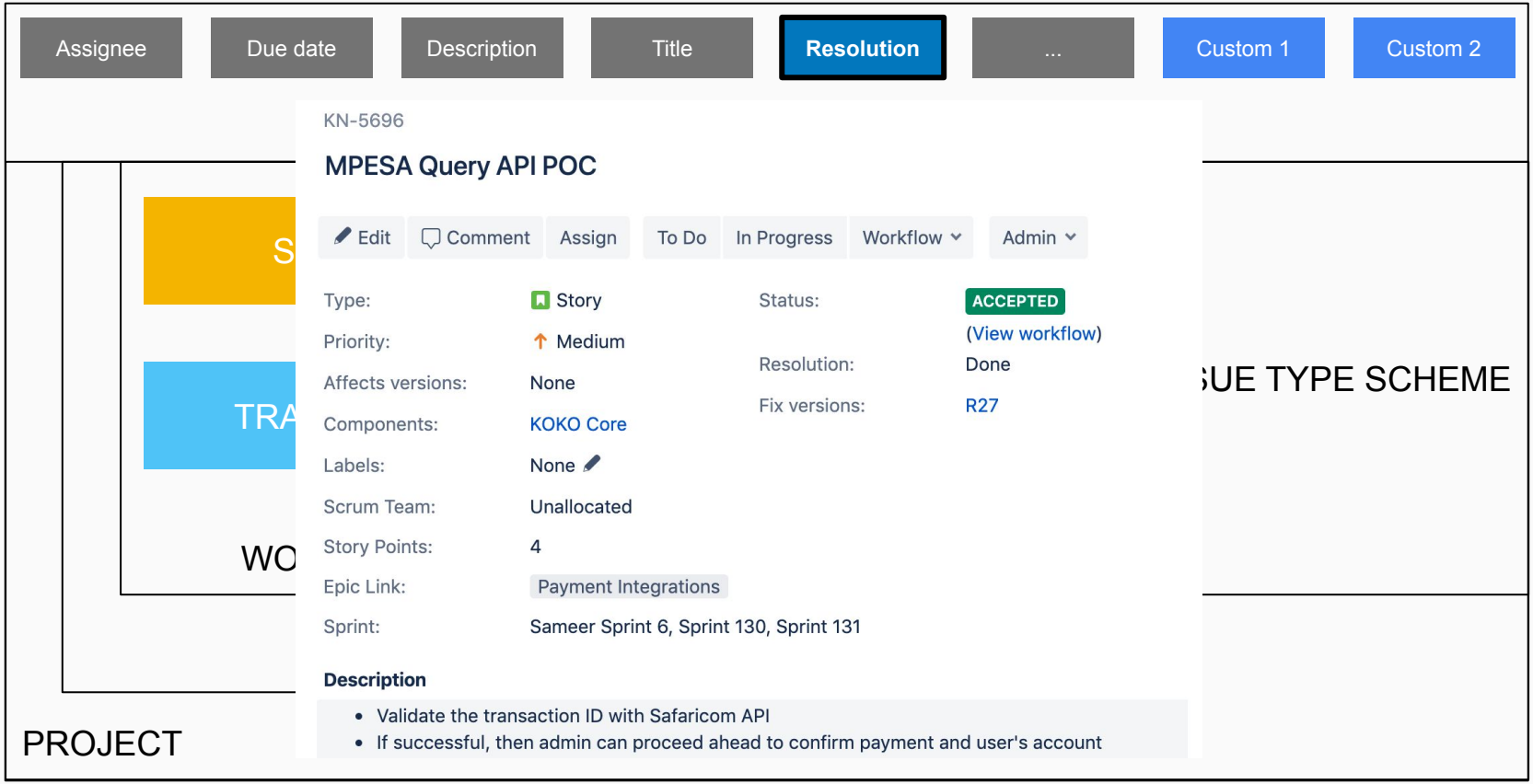
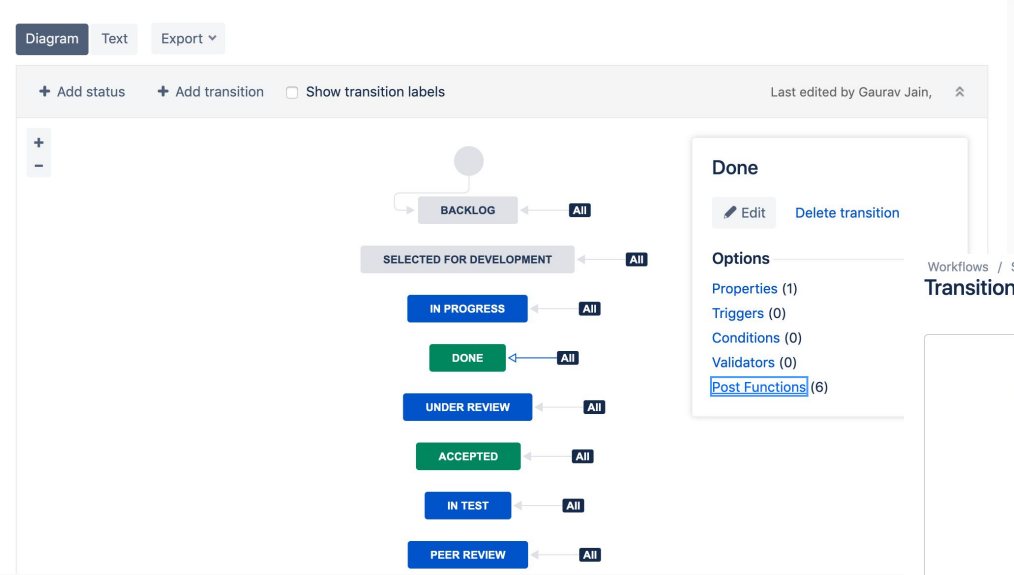
Full picture

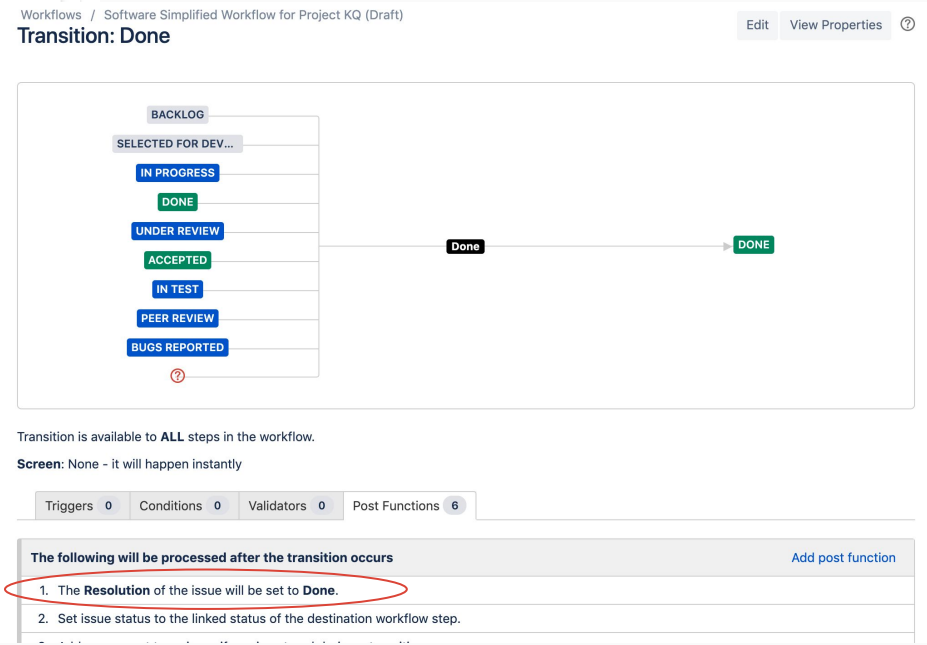


Final point: Resolution field



Resolution ends the lifecycle of an issue





Questions!

Resources

Workflow schemes

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

Screen schemes

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