ALVIN'S GUIDE

Master Using Jira the Fast Way

FIRST EDITION

By Alvin the PM

Creator of AlvinthePM.com

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Also, I'd love to hear from you. If you found this super helpful, please let me know and **drop me a comment here**.

Good luck, Alvin

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Getting **Started** with using Jira

Step 1 – <u>Click here to create a FREE account with using Jira.</u>

Step 2 – Follow along with my step-by-step FREE course to master how to use Jira.

MASTER how to use Jira for beginners **step-by-step**, by watching my **FREE Course** by <u>clicking this link here.</u>

➔ **<u>Click here to watch my FREE course on mastering how to use Jira.</u>**

Jira Keyboard Shortcuts I Use the Most

| Keyboard Shortcut	What this does
[	Collapses left side panel, showing Backlog, Sprint, etc
/	Opens up SEARCH Bar at top of window
C	Opens window to create a new Issue
1	Switches to Backlog Mode
2	Switches to Active Sprints Mode
G, then I	View All Issues
Issue Panel	
L	Labels the issue
A	Assigns the issue
In SCRUM Backlog Board	
S+T	Sends Issue to top
S+B	Sends issue to Bottom
IN SEARCH ISSUES Module	
T	Toggle between List and Detailed Mode -Use List Mode for easy export into Excel -Use Detailed Mode to easily view the issues
In BACKLOG Module	
E	Opens up Epics panel to left side of screen
V	Opens up Versions panel to left side of screen

Creating your Project in Jira
- Project Name: E-commerce Shopping App
- Key: ESA
  - Template: Scrum
  - Type: Company-managed
- Goal of Software App: Allow customers to search for and buy products in the store

Scrum Sprint Board - *Board to track team's work (To Do, In Progress, Done)*
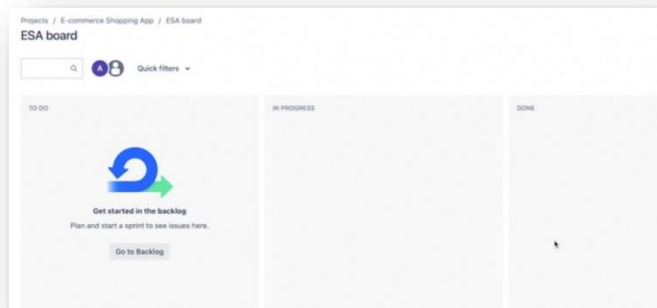
Note: At this point in time, ao information will be populated inside your board, since you have NOT inputted data inside your Jira project

Backlog Interface - *where we add our Issues (user stories, epics, bugs, tasks)*

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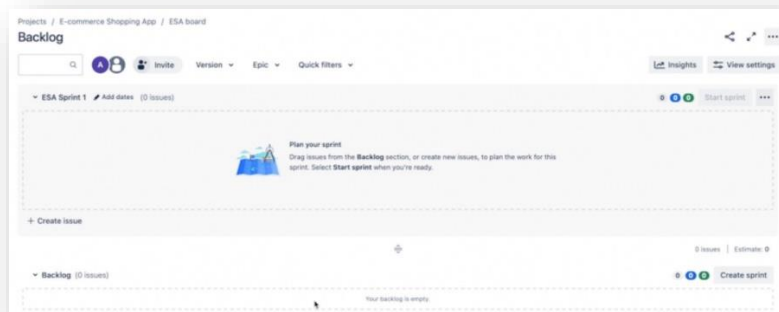
- The Backlog is what the Product Owner or Product Manager owns and prioritizes, based on customer value

Data to Create our Project Using Jira

Project: E-commerce Shopping Application

- Here is the data we will be using:

Epic	#1	Shopping Cart
User Story	1	As a customer, I want to check out the items from my shopping cart, so that I can pay for my selected items
Task	1a	Create User Interface Mockup
Task	1b	Write technical implementation strategy
Task	1c	Write acceptance tests and review
Task	1d	Create user interface layout
Task	1e	Write unit tests and code for front end
Task	1f	Write unit tests and code for back end
Task	1g	Run acceptance tests
User Story	2	As a customer, I want to review the items in my cart, so that I can correct any items before I purchase them.
User Story	3	As a customer, I want to update the number of items in my cart, so that I can adjust what I am buying.
Task	3a	Write and review acceptance tests
Task	3b	Write unit tests and code for cart mobile service
Task	3c	Run acceptance tests
Task	3d	Fix bugs
Task	3e	Perform code review
User Story	4	As a customer, I want to add a different Shipping Address than my Billing Address, so I can have the product shipped to the correct location
User Story	5	As a customer, I want to add a new Shipping Address, so I can send the order to a different location
User Story	6	As a customer, I want to add my Credit Card information, so I can pay for the items.

Epic	#2	Cancelling Orders
User Story	1	As a customer, I want to be cancel recently purchased orders, so that I obtain a refund.
User Story	2	As a customer, I want to select which items that I would like cancelled, so I can obtain a refund.

Epic	#3	User Account
User Story	1	As a customer, I want to be able to log in to my account, so that I can manage my account
User Story	2	As a customer, I want to add my payment information, so that I can process payments faster.
User Story	3	As a customer, I want to review my account history, so I can see what I purchased in the past.

User Story	4	As a customer, I want to view my wish list, so I can share what I want with others.
User Story	5	As a customer, i want to be able to change my password, so I can login with new credentials.
Epic	**#4**	**Shopping Interface**
User Story	1	As a customer, I want to view products available in the store, so that I can decide which items to buy.
User Story	2	As a customer, I want to choose the size and quantities for the items I want, so that I can purchase what I need.
User Story	3	As a customer, i want to view the sales price of similar items in the catalog, so I can decide what to buy.
User Story	4	As a customer, I want to view which physical store location has the item I want, so I can purchase it in-person.
Epic	**#5**	**Product Search**
User Story	1	As a customer, I want to search for items available in the store, so I can find the items I want to buy.
User Story	2	As a customer, I want to filter my search, based on category, brand, and price.
User Story	3	As a customer, I want the app to run existing product queries, so I know the price of similar products.
User Story	4	As a customer, I want the app to create filtered results based on my search history.
User Story	5	As a customer, I want the app to show personalized results of products I'm interested in.
Epic	**#6**	**Loyalties Program**
User Story	1	As a customer, I want to get discount coupons when I purchase more than a certain amount, so I can be rewarded for my loyalty to the company.
User Story	2	As a customer, i want to receive an anniversary discount so that I'm rewarded for my one-year anniversaries with the company.
User Story	3	As a customer, I want to receive Refer a Friend Bonus Discounts, so that I can share products with my friends
Epic	**#7**	**Shopping Location**
User Story	1	As a customer, i want to see which shopping store is near to my location, so I can drive to the physical location.
User Story	2	As a customer, I want to see the address and phone number of all shopping stores closest to me, so I can call them when needed.
User Story	3	As a customer, i want to see the Available Shopping hours for each shopping store location, so I know when the store is open.
Bug	1	BUG: Error message when user tries to check out with the shopping cart
Bug	2	BUG: Search results do not appear, when using the Android mobile app
Bug	3	BUG: Windows do not resize when the app begins loading
Bug	4	BUG: Incorrect amount is added up, during checkout, for shopping carts containing more than 5 items

For this project, in our Jira FREE Course, we will label User Stories which fall underneath the Epics as follows:

Corresponding Epic	Label
Shopping Cart	Shopping
Cancelling Orders	Shopping
User Account	User-Admin
Shopping Interface	Shopping
Product Search	Shopping
Loyalties Program	User-Admin
Shopping Location	Store-Info

Creating Epics in your Project
- Create an Issue for Project, by clicking on blue CREATE BUTTON at top

- Example of creating an Epic:
  - **Epic Name -** Shopping Cart

- o **Summary** - Shopping Cart
- o **Parent** - N/A
- o **Description**
  - ▪ *Purpose*: Defining functionality for the shopping cart interface for checking out & purchasing items
- o **Reporter** - Your Name
- o **Priority** - Medium
- o **Assignee** - Automatic
- **Epics Panel**
  - o After you create your Epics, they will NOT immediately appear in the Backlog. You need to expand the EPIC left-hand side panel (*Press the keyboard button E, to expand & collapse the Epic panel*)
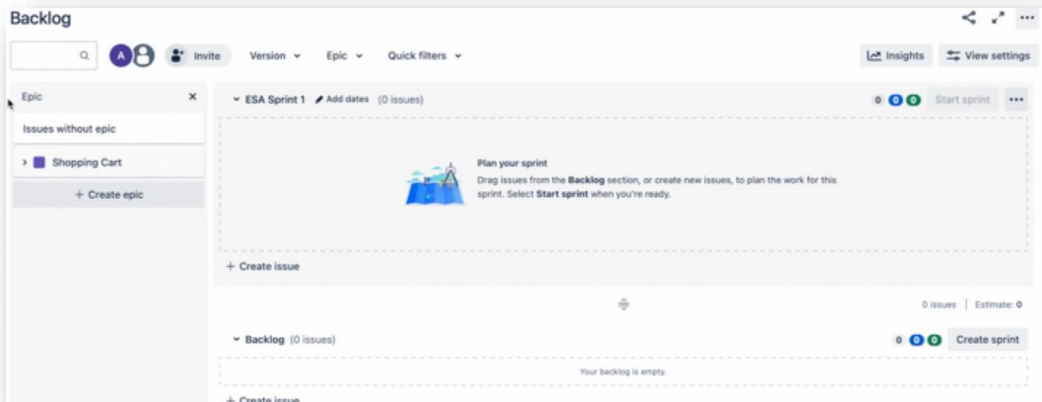
- To create another Epic, click on the **"+ Create epic" button**, *at bottom of Epic panel*
  - o ***Alvin's Speed Hack:*** Click on the Checkmark Box at the bottom for "Create another issue" in the window for 'Create Issue' to create multiple Issues one after another
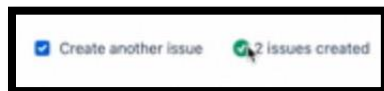
- After you create several Epics, this is what it will look like in the Epics Panel:
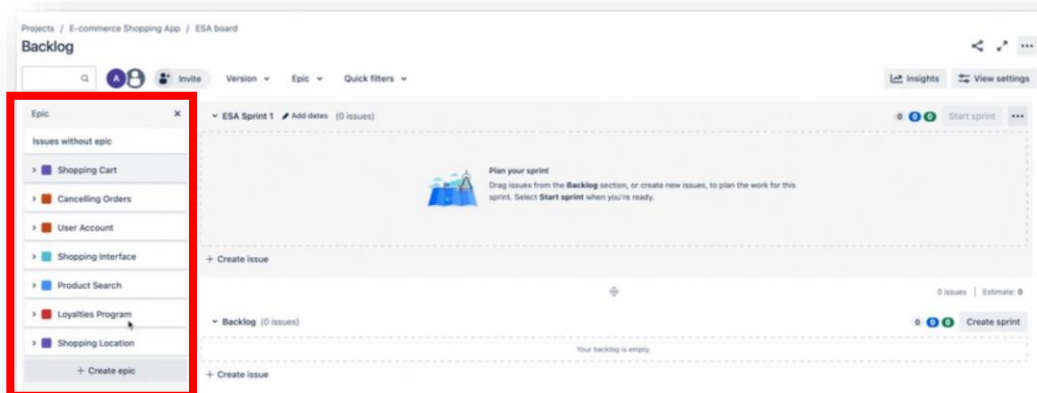
Color Code your Epics to easily identify and categorize your product's features

- Under the Issue Details of the Epic, you can left-click the colored box, and choose the color you want *(ex: **Purple, as shown below, for Epic of Shopping Cart**)*

- After you color code your Epics, this is an example of what your Epics Panel looks like:
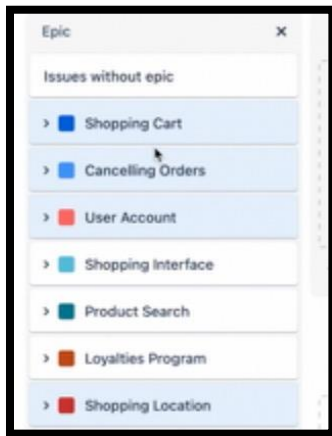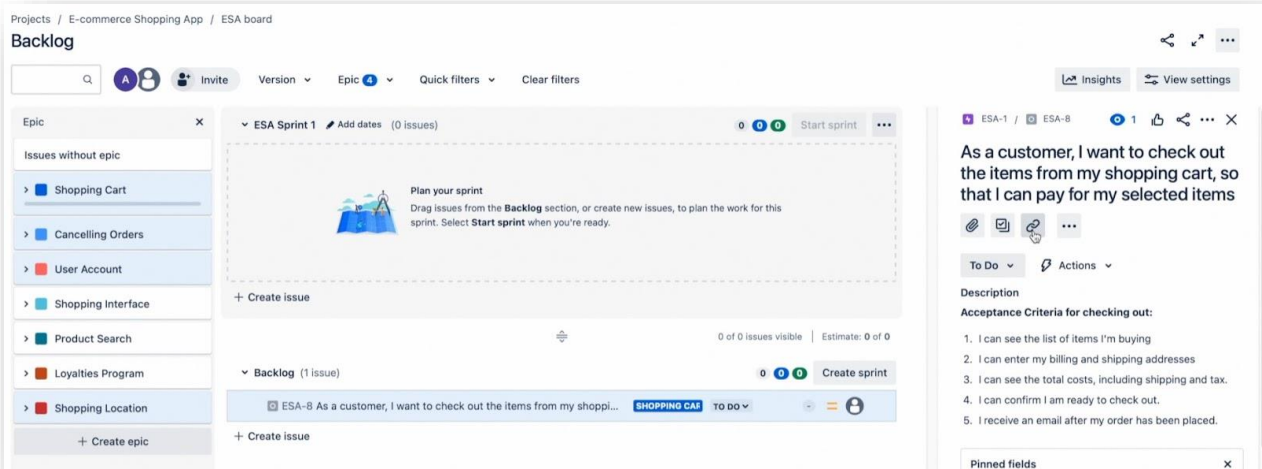

Creating User Stories
- Click blue CREATE button at top, to create a User Story
- <u>Example</u>
  - o **Issue Type** - Story
  - o **Status** - To Do
  - o **Summary** - As a customer, I want to check out the items from my shopping cart, so that I can pay for my selected items
  - o **Parent** - ESA-1 Shopping Cart
    - ▪ *Alvin's Tip:* Choose the Epic that this User Story is associated with
  - o **Description -**
    - ▪ Acceptance Criteria for checking out:
      1. I can see the list of items I'm buying
      2. I can enter my billing and shipping addresses
      3. I can see the total costs, including shipping and tax
      4. I can confirm I am ready to check out.
      5. I receive an email after my order has been placed.
- After you create your first User Story into your Backlog, this is what the Backlog will look like:
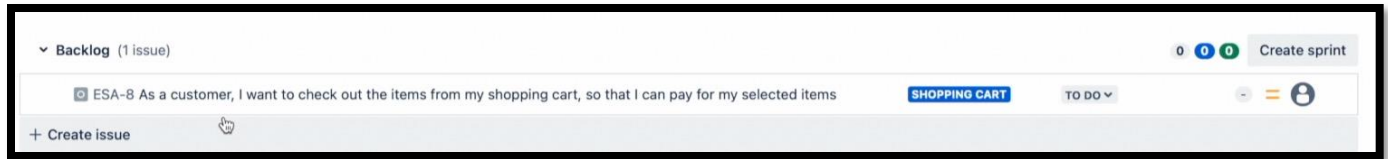
- o Each User Story will be listed line by line in the Backlog.
- o To view the Issue Details of a User Story, left click the Issue, and details will appear on the right hand side (shown below)

- After you input the remaining User Stories, this is a partial snapshot of what the Backlog will look like:
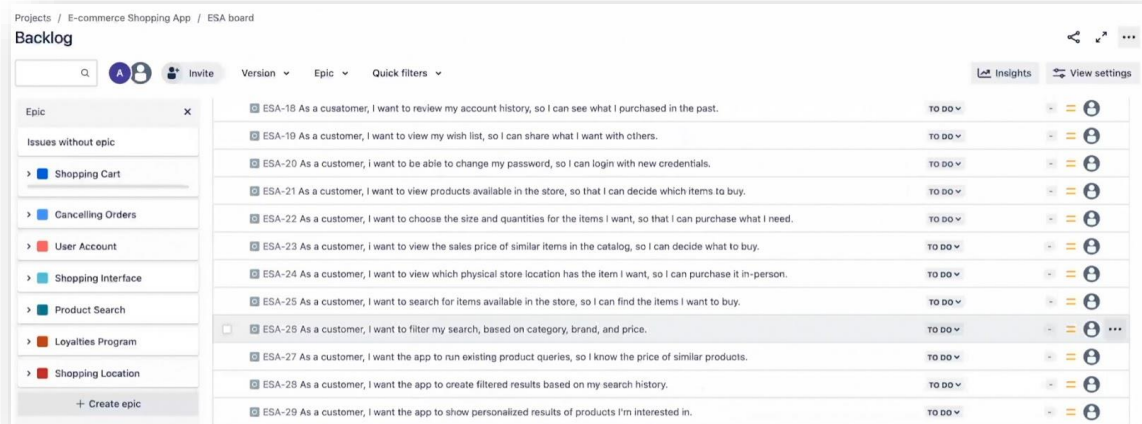
Adding a Bug to your Backlog
- Click on the blue **CREATE** button at top, or click on the **"+ Create Issue"** at bottom of backlog.
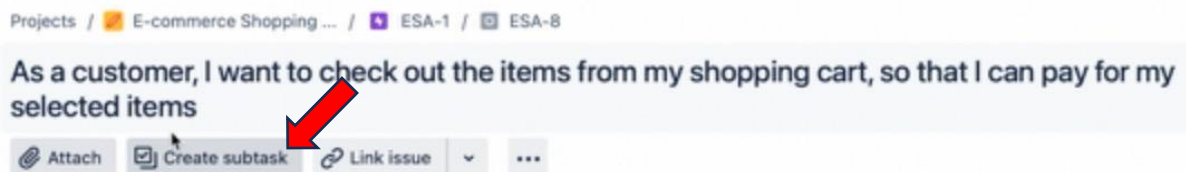- Make sure to <u>choose the correct issue type for bug.</u>

- Here's an example of what it looks like, after you've added in several Bugs to the Backlog:

> 🔴 ESA-36 bug: Error message when user tries to check out with the shopping cart
>
> 🔴 ESA-37 bug: Search results do not appear, when using the Android mobile app
>
> 🔴 ESA-38 bug: Windows do not resize when the app begins loading
>
> 🔴 ESA-39 bug: Incorrect amount is added up, during checkout, for shopping carts containing more than 5 items

Adding Subtasks for a User Story

- Click on the button for "**Create subtask'** inside the specific User Story Issue Detail, example below:

Projects / 🟧 E-commerce Shopping ... / 🔷 ESA-1 / ⬜ ESA-8

As a customer, I want to check out the items from my shopping cart, so that I can pay for my selected items

📎 Attach   📋 Create subtask   🔗 Link issue   ⌄   ···

- After you've added in subtasks to the User Story, this is what it would look like:

Subtasks			
			0% Done
⬜ ESA-40	Create user interface mockup	= 🧑	TO DO ⌄
⬜ ESA-41	Write technical implementation strategy	= 🧑	TO DO ⌄
⬜ ESA-42	write acceptance tests and review	= 🧑	TO DO ⌄
⬜ ESA-43	Create user interface layout	= 🧑	TO DO ⌄
⬜ ESA-44	Write unit tests and code for front end	= 🧑	TO DO ⌄
⬜ ESA-45	Write unit tests and code for back end	= 🧑	TO DO ⌄
⬜	Run acceptance tests		🧑
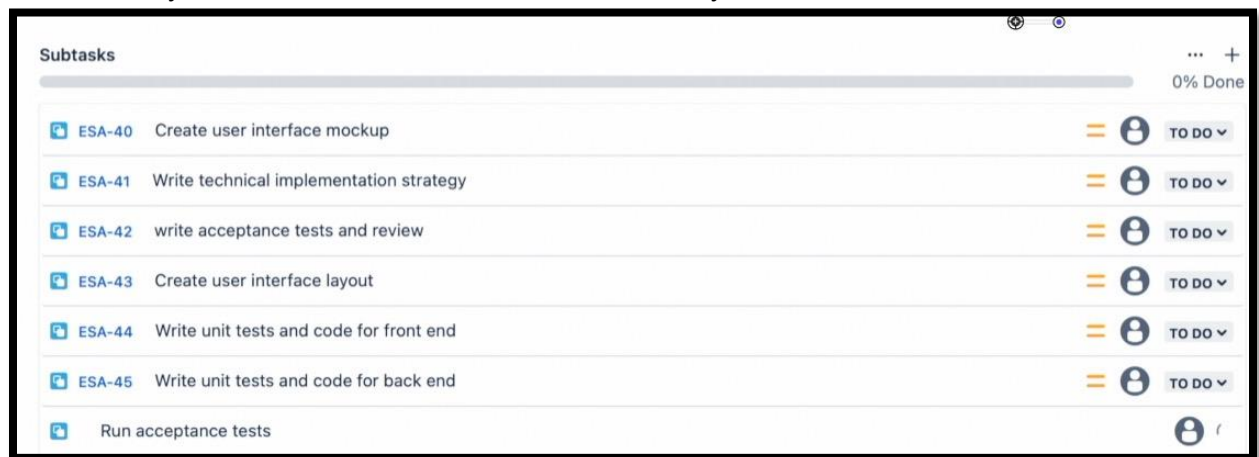
Assign Epics to User Stories

- Left-click each issue, and drag & drop them into the Epic (within the Epic Panel)

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- This is a snapshot of what the Backlog looks like, when the User Stories have been assigned to the appropriate Epic:

How to Add Labels to Categorize Issues
- Under the Issue Details, select the Labels field, and type in the Label you want to use. *Example - Using a label called "Shopping"*


- **Alvin's Tips with using Labels**
  - o Keep your Labels to be one-word texts, *example: Shopping*
  - o If they need to be more than one word, then use a dash or a hyphen to separate them. *Example: "User-Admin"*

  - o
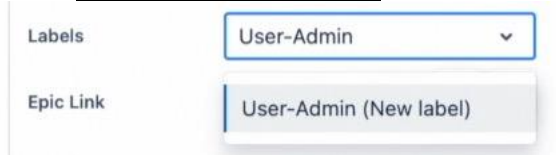
Components
- Why it's important?
  - o Used to group issues within a project, into smaller parts
  - o Similar to Labels, and you may need to be an Admin to create Components
- Example
  - o Components for iOS, Android, Windows, Web Development, etc
- Click on the Components interface on the left panel, and click on the blue button on the right side for "Create Component"
- To assign Components to an Issue
  - o Under the Issue Details, find the field for Components, and assign the Component, as shown below:
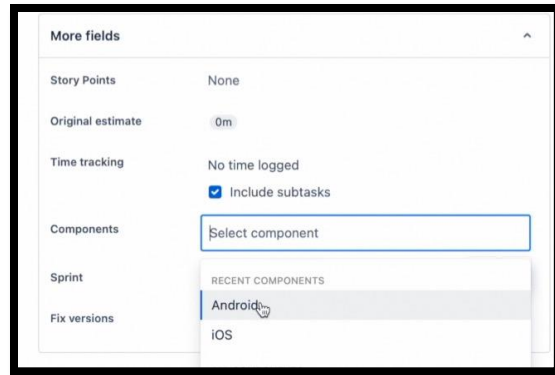
Versions - Used to track different Software Releases for the project
- How to create a Version using Jira
  - Go to the RELEASES Module on left side panel
  - Click on blue button for "Create version"
- Example of creating a Version 1:
  - **Name** - Version 1
  - **Start Date -** 1/15/2024
  - **Release Date -** 6/28/2024
  - **Driver** - Your name
  - **Description** - Initial Release - Allow customers to buy products online

How to link versions to your Issues in the Backlog Module
- Open up a Versions panel on the left, by pressing the keyboard shortcut for V. Or, open up the Version panel, by clicking on Version underneath the Version dropdown menu:
- Drag and drop your Issues onto the Version, to assign it to that specific Version:
- An example of what several releases look like under the Releases Module

- To release a Software Version, click on the three dots button at the far right, and select "**Release**."

How to Groom the Backlog using Jira
- Drag and drop the Issues in the Backlog above or below the appropriate issue, so it's ranked & prioritized appropriately

- **Alvin's Tip for Backlog Grooming:**
  - Prioritize issues UPWARD. Compare issues to those above it, and prioritize it accordingly
  - Filter the Issues based upon the Versions which need to be released first. For example, filtering based upon Version 1.0:
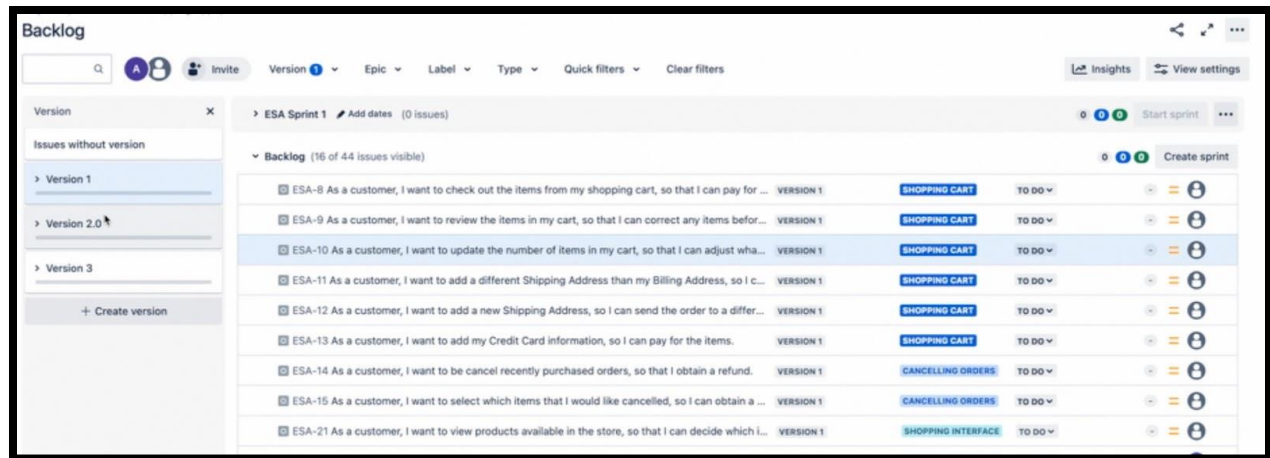
Creating Your Sprint using Jira
- Drag and drop each Issue into the box for the Sprint.
- In Sprint Planning, assign each user to each Issue
- To Start the Sprint, click the blue button, stating "Start sprint"
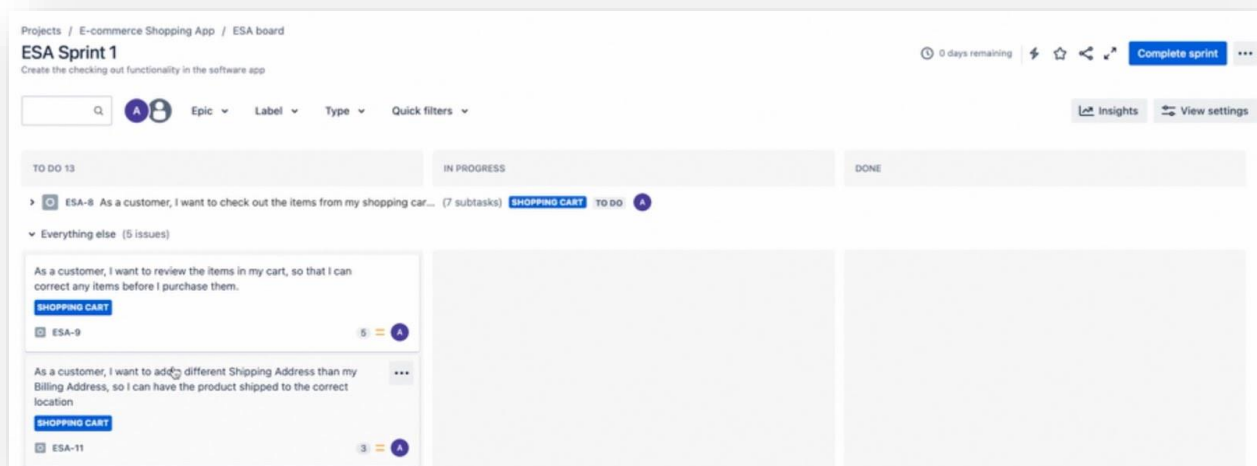 - Example of how to fill out details for Starting the Sprint
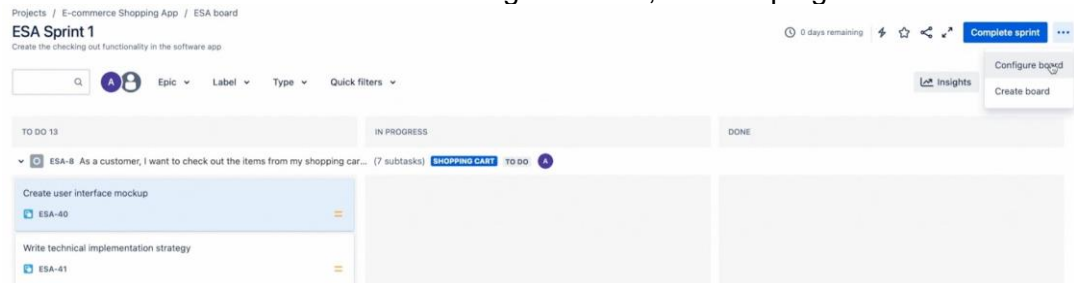
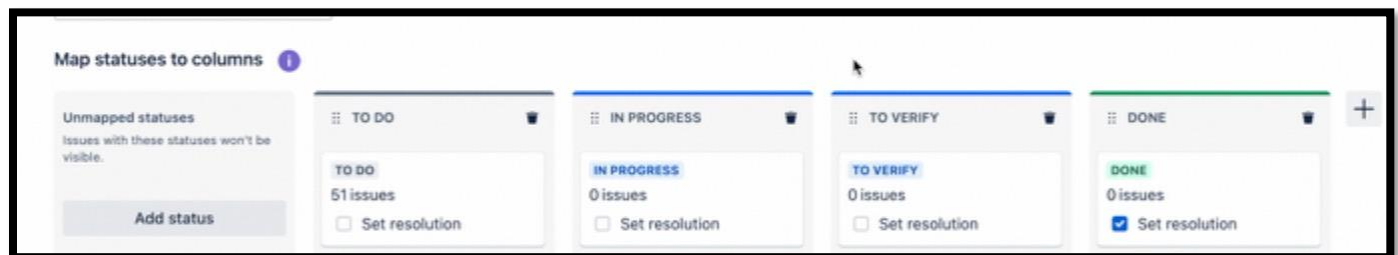**What the Sprint Kanban Board looks like**

- **To customize the columns inside your Scrum Board**
 - ○ Click on the Three Dots Button > Configure Board, at the top right

  - ○
  - ○ Select the Settings for Columns.
  - ○ Under the section for "Map statuses to columns', this is where you can add columns and other statuses
    - ▪ Example: Adding a To Verify Column to the Board

- **Goal with the Scrum Board:** Drag and drop each item from To Do > In Progress > To Verify > Done
- To close out a Sprint, click on the "**Complete Sprint**" button at the top right
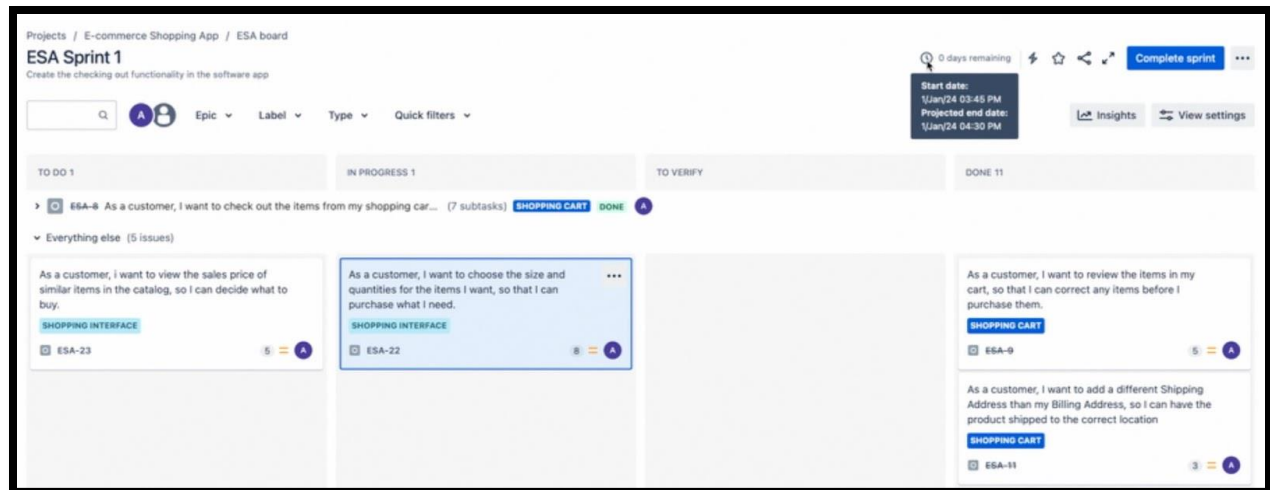
- When you complete a Sprint, you can move open issues to a <u>New Sprint or to the Backlog.</u> *(Alvin's Tip: Best practice is to move unresolved issues to the Backlog for reprioritization & evaluation by the Product Owner & team)*

Thank You! 🙏

If you gained value out of my FREE Jira Course (<u>FOUND HERE),</u> would you do me a favor, and please share my video with a friend and others who you think might find it helpful?

It's my goal to help you grow in your career, so you can earn the income you deserve!

Thank you in advance for helping me reach a bigger audience! Your support means a lot. 😊

Cheers, Alvin