ATLASSIAN University

Jira Essentials with Agile Mindset - Cloud

Lab Workbook

ATLASSIAN University

Table of Contents

Jira Essentials Introduction 1
Lab format 1
Lab 1 - Course Overview 2
Lab 2 - Jira Overview 4
A. Explore a kanban project 4
B. Create issues 5
C. Star items 5
Lab 3 - Project Boards 7
A. Move issues through a workflow 7
B. Assign an issue 7
Lab 4 - Enrich Issues 9
A. Add information to an issue 9
B. Use team-related issue features 10
C. Create issues of different types 11
D. Create subtasks 11
E. Add labels to issues 12
Lab 5 - Kanban Projects 14
A. Explore WIP limits 14
Lab 6 - Scrum Overview I 15
A. Explore a scrum project 15
Lab 7 - Scrum Overview II 16
A. Create issues in the product backlog 16
B. Plan a sprint 16
C. Start a sprint 18
D. Complete a sprint 19
Lab 8 - Quick Search and Basic Search 21

A. Perform quick searches 21
B. Perform basic searches 22
C. Work with search results 22
D. Make bulk changes 23
Lab 9 - Filters 24
A. Explore default filter queries 24
B. Create a starred filter 24
C. Explore quick filters 25
D. Filter by label 26
Lab 10 - Epics 27
A. Create an epic issue 27
B. Add issues to an epic 27
C. View an epic in the backlog 28
D. Complete an epic 28
Lab 11 - Dashboards 30
A. Explore the default dashboard 30
B. Create a dashboard 30
(Optional) Lab 12 - Capstone project 32
Lab 13 - Lean and Agile Principles 34

Jira Essentials Introduction

Lab format

Optional exercises and appendices

The labs may have optional exercises. These are not required to complete the course. However, if you have time and interest, they supplement the exercises for the lab. There may also be appendices that you don't need to complete the class. They are full of useful information like additional reading and best practices. Dig into these after you complete the course!

Language and User Interface

The language you see in the Atlassian product UI is set to your browser's language. If you wish to see the UI in English (to match the lab instructions), or in a different language, go to your Atlassian user profile and edit your account preferences.

Cloud products are constantly being updated with new features, so you may see some slight differences between the lab instructions and the product you are using.

Logging in to your lab environment

To log in during the labs, you need your assigned site URL and the user's email address specified in the lab directions and password. If you're taking an On Demand course, you'll find these in the **Virtual Lab Instructions** activity in the **Lessons** section. If you're taking an instructor-led course, your instructor will share these details with you.

ⓘ The password for every user is the same. Keep this password easily accessible.

⚠ When switching between products in these labs, you can see other sites. It's important that you choose the product on the site that's been assigned to you.

Here's a list of the user(s) and what role they have in this course.

Name	Role
Ryan Lee	Team member

Lab 1 - Course Overview

Logging into your lab

To log in during the labs, you need an assigned **site URL** and each user's **email address** and **password**. If you're taking this as an OnDemand course, you'll find this in the **"Virtual Lab Instructions"** activity. If you're taking an instructor-led course, you'll receive the details from your instructor.

The **password** for **every user** is the **same**.

Do not log in with your own Atlassian ID

You probably already have an Atlassian account that you use to log in to your own Atlassian products. In the labs for this course, a specific set of users has been added to the cloud site. You will log in with these accounts. Do not log in using your own Atlassian ID.

Log in using a new browser, or an Incognito or Private window

A single browser can only handle one Atlassian account. This is because browsers keep cookies. Once you're logged into a cloud site on one browser, it remembers that login. So, if you open a new tab, you can't login as someone else.

To log into your lab, use a different browser to the one you usually use, or use an incognito or private window to log in.

Logging into labs as different Users

In the labs you'll need to log in as one or more users. To avoid logging in and out a lot you can either use different browsers or use an incognito or private window for each user.

Opening an Incognito window

> ⓘ You can open either an incognito window (Chrome) or private window (Firefox) from the browser menu. Other browsers also have the same functionality.

Chrome

1. Either:
    a. Click the Chrome three-dot (ellipses) menu button or
    b. From the Chrome browser menu click File.
2. In the dropdown menu, click New Incognito Window

Firefox

1. Either:
    a. Click the three-line Firefox application menu or
    b. From the Firefox browser menu click File.
2. In the dropdown menu, click New Private Window

Accessing your site

1. Use your assigned **site URL to navigate to your site.**

You’re all set!
When you get to Jira/Confluence, you'll be told who to log in as.

Lab 2 - Jira Overview

Scenario: Ryan Lee is assigned to work on a kanban project, ProjectA. He will need to identify and organize his work. He would also like to add this project to his favorites so he can easily navigate to it when needed.

Estimated time: 10 minutes
In this lab, you will:
A. Explore a kanban project
B. Create issues
C. Star a project

Note: The details you see may be slightly different in your site because features are rolled out in stages to groups of users.

A. Explore a kanban project

1. Navigate to the URL of your cloud site and log into Jira as **Ryan Lee** (rlee). The email address and password for this user should have been provided separately - see the previous lab.
    - **Note**: Ryan is a member of the jira-software-users group.
2. If you see onboarding screens such as "Invite your team" and "Help us setup your Jira" screens, click **Skip, Continue** or **Skip question**.
3. Click **Projects** from the top navigation bar, then select **View all projects**.
4. All projects that Ryan has access to appear here. Click **projectA** from the list to open this project.
5. In the project sidebar, we see this is a kanban project containing a kanban board. At the bottom, you can see that this is a company-managed project.

Throughout these labs, you may see Jira Quickstart or other prompts not described in the lab. You can read the information and then dismiss those prompts.

Congratulations, you have opened a company-managed kanban project.

B. Create issues

ⓘ The planned work of a project is broken down into issues. Issues are also known as work items and include stories, bugs, and more. We will start with three simple issues, named " add item 1", "add item 2" and " add item 3". There are several ways to create issues; here, we will use the create button and learn to use keyboard shortcuts.

1. You should be at the kanban board for **project A**. If not, click **Kanban board** in the sidebar. The board will be empty as no issues have been created yet.
2. Create an issue named **add item 1**:
    a. Select **Create** (it may be a + sign) in the top navigation menu. The **Create issue** screen appears.
    b. Under **Issue Type**, select **Story**.
    c. Under **Summary**, enter **add item 1**.
    d. Since you are creating another issue after this one, select the **Create another issue** checkbox (this is located at the bottom of the **Create Issue** screen) to expedite issue creation.
    e. Select **Create**.
3. Create another **Story** with a **Summary "add item 2"** this time without the **Create another issue** checkbox selected.
4. You should return to the kanban board with the two new issues in the **BACKLOG** column.
5. You can also use keyboard shortcuts in Jira. Press **?** on your keyboard to view a list of shortcuts.
   Note: You can create an issue by clicking **c**.
6. Select **Close** to close the shortcut list and return to the kanban board.
7. Press **c** on your keyboard.
8. Create another **Story** with **Summary "add item 3"**.
9. You should see your three issues on your kanban board in the **BACKLOG** column.

✅ Congratulations, you have created three issues.

C. Star items

ⓘ You can star projects, boards, filters, and dashboards in Jira for easy access. Here, we will star a project.

1. Select **Projects** from the top navigation bar, then select **View all projects**.
2. Select the **star** icon to the left of the **projectA** project name. This project is now starred.
3. Select **projectA** to navigate back to the project.
4. Select **Projects** again from the top navigation bar and notice there is now a section titled “Starred" with the current project displayed.

Congratulations, you have starred a project and completed this lab.

Lab 3 - Project Boards

Scenario: Ryan's work is now defined in ProjectA and is visible to him and the team. He is now ready to get to work! Ryan can move an issue through columns to change their status as he works on them.

Estimated time: 5 minutes
In this lab, you will:
A. Move issues through a workflow
B. Assign an issue

A. Move issues through a workflow

1. Navigate to the **projectA** project (you may need to click **Projects** in the navigation header, then select **View all projects,** finally click on **projectA** from the list). This is your company-managed kanban project.
2. Select the **Kanban board** tab in the sidebar to view your board (if necessary, click the **Back to project** link first).
3. You should see three issues on the board from the previous company-managed kanban lab.
4. Move issues to new columns:
    a. Select an issue to open its details. Notice that the value in the dropdown on the upper right matches the name of the column on the board (this is not always the case, though). This is the **Status** field in Jira. Change the status value, then close the issue details window and notice that your issue has changed columns on the board.
    b. Alternatively, drag and drop issues between columns on the board and open the issue details to see the status change.

Congratulations, you have moved issues through a workflow, both by dragging and dropping and by changing the issue's status field value.

B. Assign an issue

1. Select the issue "**add item 1**" to view its details. Notice that the **Assignee** field is **Unassigned**. Click on the **Unassigned** value and select **Ryan Lee**. Alternatively, you can select **Assign to me** to assign yourself to the issue.
2. **Close** issue "add item 1."
3. Select the issue "**add item 2**" to view its details. Press **i** on the keyboard. This is the keyboard shortcut to assign issues to yourself. Now, the team knows that Ryan is responsible for working on these two issues.

4. **Close** the issue details window and notice that Ryan's avatar (or initials) appears with the issue on the board. (You may need to refresh the page to see Ryan’s avatar.)

Congratulations, you have assigned an issue. You have completed this lab.

Lab 4 - Enrich Issues

Scenario: Ryan realizes he needs some issues of different types, such as bugs and tasks, to categorize work better. In addition, he will further define issues by adding detailed information in the issue fields, adding labels, and using some team-related features to help him communicate effectively within the organization.

Estimated time: 25 minutes
In this lab, you will:
A. Add information to an issue
B. Use team-related issue features
C. Create issues of different types
D. Create subtasks
E. Add labels to issues

These instructions assume you have created issues in the **projectA** kanban project.

A. Add information to an issue

1. View your **projectA** board.
2. Create an issue of type **Story** and a summary of **add item 4** (or the next item number for issues on your board).
3. Select the newly created issue to view its details.
    - **Note:** Move your mouse over the space between the issue details and fields on the right side. When you see a line, grab it to adjust the column size in the issue view to your preferred widths.
4. Select the **Description** field. Notice that a rich text editor is shown. Enter "**Here is the description of item 4.**". Change the description in any way that interests you (change text size, text style, add emojis, add bullets, insert an image, insert a table, etc.). Make sure to **Save** your changes.
    - **Note:** As you scroll down the page in the issue view, the toolbar will stick to the top of the screen, making editing easier and more efficient when you have a lot of text in your description.
    - **Note:** If you are familiar with markdown, use it in the editor. For example, surround a word with double asterisks to make it bold.
5. Select the **Attach** icon under the issue's title/summary to add an attachment. You could also do this by selecting the **Add image, video or file** icon in the Description field's editor. Select **Cancel** to skip adding an attachment.
6. Select the **Link issue** icon under the issue's title/summary to view the options to link issues. Select **is blocked by** then select the "**add item 1**" issue. This means that the "add

item 1" issue must be completed before the work on this issue can be completed. (If you don't see the "add item 1" issue, make sure that it is not in the **Done** column.) Select **Link**.
    - **Note:** You can choose an existing issue or create and link to a new issue by selecting the **+ Create linked issue** text under the **is blocked by** dropdown box.
7. **Close** the “add item 4” issue.
8. **Open** the **"add item 1"** issue and notice that the **Linked issues** section blocks the issue you just created.
9. **Open** the “**add item 4**” issue you created in this lab. Select **Link Issue** dropdown arrow under the issue's title/summary. Select **Link Confluence content**. You should see a **Confluence content** section. Here, you can connect the Jira issue to a Confluence page. We don't have any Confluence pages, so select **Cancel**.
    - **Note:** Confluence is an Atlassian product that acts like a team website or wiki. For example, it can contain information and discussions related to the project. Using Confluence is outside the scope of this course.
10. Select **more icon** (...) in the upper right of the issue details and select **Log work**. Enter time spent as **6h** (6 hours) and estimate the time remaining as **2d** (2 days). Under **Work description**, enter "**Researched implementation options.**" and select **Save**.
    - **Note:** Some teams log their work like this, others don't. Logging work tracks more details of the work and can be used in reports and dashboards.
11. Notice the **Time-tracking** field on the right. It shows a bar graph with the time logged and remaining. (You may need to refresh your browser or select the **More fields** arrow to view this).
12. Under **Activity** section at the bottom of the issue, select **Work log**. You should see the work that you just logged.
13. Under **Activity**, select **History**. You should see the changes that you have made to the issue.

Congratulations, you have enriched an issue by adding information to it.

B. Use team-related issue features

1. Open the **add item 1** issue.
2. Change the **Assignee** to **Alana Grant**.
3. Under **Activity**, select **Comments**. Add a comment to the issue. Notice that comments also use the rich text editor. This is an excellent way for teams to discuss the issue.
4. "At mention" **Alana** in the comments by typing **@** (or selecting the **@** icon in the editor) and selecting **Alana Grant.** Then enter a comment such as "You have been at mentioned!". Select **Save**. Alana Grant will then be sent an email containing the comment and a link to the issue. (Note: Viewing emails is not supported in this course.) She will also see a notification the next time she logs into Jira (more information below).

Note: Steps 5 and 6 below are included for information purposes. Email is not configured on your Cloud instance for these labs. Because of this, you can't share items or add watchers. You can share items and add watchers on your own instance.

5. The **Share** icon (it contains circles connected with lines) is in the upper right. You can share a link to this issue via email and add a message to your teammates via the **Share** icon. **Note that email is not configured on your Cloud instance for these labs, so you won't be able to use this feature in these labs. You can share items and add watchers on your own instance. If email hasn't been configured for your instance, you'll see this information in a pop-up:**

6. The **Watch options** icon in the upper right (it looks like an eye). As the issue's original reporter, you should automatically be watching this issue. You could remove yourself or add others to the watch list. Watchers will be sent an email when something changes in the issue. **Note that email is not configured on your Cloud instance for these labs, so you won't be able to use this feature in these labs. You can share items and add watchers on your own instance.**

Congratulations, you have used team-related issue features.

C. Create issues of different types

1. Navigate to your **projectA** kanban project board.
2. Create an issue with a summary/title named **add item 5**. Assign an **Issue Type** of **Story** to the issue.
3. Create an issue with a summary/title named **fix bug 1**. Assign an **Issue Type** of **Bug** to the issue.
4. Create an issue with a summary/title named **complete task 1**. Assign an **Issue Type** of **Task** to the issue.
5. Move the issues through some of the columns on the board. Notice that they all behave similarly because they all use the same workflow.

Congratulations, you have created issues of different types.

D. Create subtasks

1. Using the same procedure as in the previous step, try to create an issue with an issue type of **Subtask**. Notice that this option is not available. This is because subtasks must have a parent issue. **Cancel** the attempt to create this issue.

2. From the board, open the **add item 5** issue. Select the **Create subtask** icon under the summary/title to create a subtask for this issue. Create a subtask with a summary/title of **add item 5a**. Notice that a new issue key is assigned to the subtask.
3. Create another subtask with a summary/title of **add item 5b**.
4. View the board. Notice that the subtasks have been added under the **add item 5** issue in the **BACKLOG** column, independent of the status of the parent issue. (You may need to refresh the browser window to see this.)
5. Move the subtasks to different columns. Notice that subtasks have independent statuses.
6. On the project's sidebar, select **Issues** to view the issues of the project using the project issue navigator. The project issue navigator only shows issues from the current project. In the sidebar, select **All issues**. Notice that the subtasks are shown in the list. Subtasks are issues - they need to have a parent issue.
7. While viewing the issues in the project issue navigator, select the **add item 5b** subtask. Select the **more icon (...)** on the upper right of the issue to open the menu. Convert the subtask to an issue by selecting **Convert to Issue**.
8. Select **Story** as the new issue type, then select **Next**.
9. Enter **1** in the Story Points field and select **Next**.
10. Select **Finish** to convert the issue. Notice what was a subtask icon is now a story icon.
11. View the kanban board. Move the **add item 5** issue to the **Selected for Development** status. Move the **add item 5a** subtask to the **In Progress** status. Now move the **add item 5a** subtask to the **Done** status. Jira knows that all subtasks for the issue are done and asks if you want to update the parent issue to match the subtask status of done. Select **Update** to move the parent issue to the **Done** status.
12. Add subtasks to the **fix bug 1** and **complete task 1** issues. Notice that subtasks for bugs and tasks have been added to the **BACKLOG** column, independent of the status of the parent issue, just like the story issue type subtasks. (You may need to refresh the browser window to see this.)

Congratulations, you have created subtasks.

E. Add labels to issues

1. Add labels named **refactor** and **database** to some of the issues in **projectA**:
    a. Select an issue to open it.
    b. Type **refactor** in the **Labels** field.
    c. Select the **refactor (New Label)** text below the field.
    d. **Close** the issue.
    e. Repeat this process to add other **refactor** and **database** labels to other issues.
2. From the board, open an issue with the **refactor** label.
3. Under the **Labels** field, select the **refactor** label text to search for all issues with that label. You are brought to the global issue search area. Here, you can search for issues in any project on your cloud site. We will discuss searching in more detail later in the course.

Congratulations, you have added labels to issues and searched for issues by label. You have completed this lab.

Lab 5 - Kanban Projects

Scenario: Ryan has created a few issues now. He explores WIP limits that helps ensure the team is finishing the work in progress before starting on a new issue. Using the cumulative flow diagram he and team can view the overall flow and how well the team is keeping up with the backlog.

Estimated time: 5 minutes
In this lab, you will:
A. Explore WIP limits

A. Explore WIP limits

Work in progress limits help ensure that started work gets finished and allows the team to easily see bottlenecks in their workflow. You must be a Jira project administrator or Jira administrator to specify WIP limits.

1. Navigate to **projectA**.
2. Notice that the In Progress column header displays **MAX 2**. This means that the column will be highlighted if there are more than two issues in the column. This informs the team that there is too much work in progress and they need to finish some work items before starting new ones. A **MIN** value on a column indicates that the team does not currently have enough issues in that column.
   Note: You must be a Jira project administrator or Jira administrator to specify WIP limits in the board settings.
3. Drag more than two issues to the In Progress column to violate the maximum limits. The **In Progress** column should be highlighted in red when there are more than two issues.

Congratulations, you have explored WIP limits.

Lab 6 - Scrum Overview I

Scenario: Every team and every project is different. Now Ryan will inspect a Scrum project and its features.

Estimated time: 5 minutes
In this lab, you will:
A. Explore a scrum project

A. Explore a scrum project

1. Select **Projects** from the top navigation bar, then select **View all projects**.
2. All projects that Ryan has access to appear here. Select **projectB** from the list to open this project.
3. In the project sidebar, we see **Active sprints** in the sidebar indicating that this is a scrum project containing a sprint board.
4. Select **Backlog** from the project sidebar. Note the first sprint and backlog sections.

Congratulations, you have explored a scrum project. You have completed this lab.

Lab 7 - Scrum Overview II

Estimated time: 25 minutes

Scenario: Ryan and team will work on a sprint already created by the Jira administrator. In this sprint, Ryan will create issues and plan and execute the sprint. He will also explore the Sprint Report after the sprint is completed.

In this lab, you will:
A. Create issues in the product backlog
B. Plan a sprint
C. Start a sprint
D. Complete a sprint

A. Create issues in the product backlog

1. Navigate to the **projectB** project.
2. Select the **Backlog** tab to view the backlog. It should be empty.
3. Create three issues of type **Story** in the backlog with summaries of **add item 1**, **add item 2,** and **add item 3**:
    a. Select **+ Create issue** or **+ Add upcoming work here** at the bottom of the backlog section.
    b. Enter the summary into the text placeholder (what needs to be done?) next to the green story icon.
    c. Press **Enter** to create the story.
    d. Repeat this process until all three stories are created.

If you are redirected to the board settings when you hit enter to create the issue and get a message saying your issue has been created but is not visible yet, please navigate to **projectB** again and select the **Backlog** tab. This happens occasionally when using the Firefox browser.

Congratulations, you have created a backlog with three issues.

B. Plan a sprint

The Jira Project Admin has already created a sprint in Jira for your team. The team now needs to plan the sprint. Ryan will estimate his stories, prioritize the backlog, and load the sprint backlog.

Note: The start of the sprint includes a sprint planning meeting. In this meeting, the sprint team usually decides on the sprint goal, estimates the work on issues, and decides which issues to complete during the sprint. The development team decides how to accomplish the work of the sprint. All projects and sprint planning meetings are unique.

1. You should see an empty "**PRJB Sprint 1**" section in the Backlog.
2. Add estimates as story points to the issues. We will arbitrarily say that **add item 1** is 1 point, **add item 2** is 2 points and **add item 3** is 3 points:
    a. Click on each issue in the backlog to see its detail view in the sidebar, then add its estimate in the **Story Points** field (You may need to expand the **More fields** section to access this field). After entering an estimate, you should see the estimate in gray next to each issue in the backlog (You may need to refresh your browser to view this).
        - **Note:** The development team usually is responsible for estimating story points. Story points are relative units, generally indicating the effort to complete the issue.
3. Prioritize the backlog. We will arbitrarily give the 2-point story (**add item 2**) the highest priority and the 3-point story (**add item 3**) the lowest priority:
    a. Drag and drop the stories into their correct order in the backlog. (With **add item 2** at the top.)
        - **Note:** The product owner is usually responsible for prioritizing stories in the backlog.
4. Add stories to the **sprint backlog** (**PRJB Sprint 1**). We will arbitrarily assume the team can execute up to four story points per sprint. This is known as the team's *velocity*:
    a. Drag the **add item 2** and **add item 1** stories to the sprint backlog.
        - **Note:** The **product backlog** contains all the project backlog items. A **sprint backlog** is a subset of the product backlog that includes the backlog items for a single sprint.
5. Notice that the team has two issues and has estimated that its velocity for this sprint will be three story points.
    - **Note:** The development team usually decides how many top issues to move to the sprint backlog.
6. Add subtasks to the **add item 1** story in the sprint backlog by selecting the story.
    a. Next, select the **Create subtask** icon (it looks like overlapping checkboxes), and add subtasks named **add item 1a** and **add item 1b**.

During the sprint planning meeting, the team often breaks the work of a story down into subtasks. Each subtask might contain different types of work, such as user experience design or data storage work.

Congratulations, you have planned a sprint.

C. Start a sprint

ⓘ The sprint has been planned, and now the team is ready to start work. In this exercise, Ryan will start the sprint.

Note: Ryan Lee has the permissions to start and stop sprints, but normally, only a Jira or Project admin has these permissions.

1. Select the **Start sprint** button associated with the sprint backlog for PRJB Sprint 1.
2. Note the duration of the sprint is set to **2 weeks**.
3. Add a sprint goal of **Create the first product increment.**
    - **Note:** The scrum team agrees to the sprint goal during the sprint planning meeting.
4. Select **Start**. The **Active sprints** tab is selected in the sidebar, showing your sprint board. Notice the sprint goal under the sprint name. Notice that you have an issue named "add item 1" with two subtasks and an "add item 2" issue in the **TO DO** column and that the other columns are **IN PROGRESS** and **DONE**.
    - **Note:** A sprint board is a project board that only shows the issues of the sprint backlog.
5. Open an issue on the board by selecting it.
6. Select the status dropdown in the upper right and select **View workflow**. Notice that the workflow has three statuses: **TO DO**, **IN PROGRESS,** and **DONE**. These are the default statuses in the workflow when you choose the scrum template while creating a company-managed project. These three statuses match the three columns of the project's scrum board. Notice that there is no **BACKLOG** status. Select **Close**, then close the issue.
7. Select the **Backlog** tab. Select the **add item 3** story in the **Backlog** section. Notice that its status is **To Do**, the same as the issues in the first column of the sprint board. The items in the backlog section are there because they have not been added to any sprints. The status of each issue is independent of whether it is on the sprint board or in the backlog section.
8. Navigate to your sprint board by selecting **Active sprints** from the sidebar.
9. Let's assume that **Alana Grant** is a member of the development team. **Assign** her to all issues on the sprint board, including the "**add item 1**" issue.
    a. One way to easily access the “**add item 1**” issue details is to select the issue's **key** next to its status in the **To-Do** column.
    b. Another way is to open one of its subtasks and select on the parent project **key** at the top left of the subtask's issue details.
10. Drag the **add item 2** issue to the **IN PROGRESS** column.
    - **Note:** The column will show a blue highlight line as you drag the issue to the column.
11. Let's assume that Alana has finished the **add item 2** issue. Drag it to the **DONE** column.

12. Repeat the process above and complete the subtasks **add item 1a** and **add item 1b** issues. Since Alana completed both subtasks for story **add item 1**, you should be prompted to update the parent issue to **Done**. Select **Update**.

Congratulations, you have started a sprint.

D. Complete a sprint

The stories for the sprint are complete, and the end of the sprint time box has approached. Ryan is going to complete the sprint. Part of completing the sprint includes having a sprint review meeting to show the product increment to the scrum team and, optionally, its stakeholders. After the sprint review meeting is a meeting called the sprint retrospective. This is a meeting for the scrum team to discuss how the team can execute better next time. Jira will help you prepare for the sprint retro as part of completing the sprint.
In this Jira project, Ryan Lee has permission to complete a sprint. In a typical scenario, only Jira or Project Admins have permission to do so.

- You usually only complete a sprint at the end of the planned sprint duration. We are ending it early just for learning purposes.
- A team's early estimations tend to be quite unreliable. As more sprints are executed, the team should better estimate velocity based on the team's past performance.

1. Ensure **Active sprints** is selected for the project.
2. Now that the issues of the sprint are complete, you can end the sprint.
    a. In the upper right above the sprint board, select **Complete sprint** and then **Complete sprint**.
3. You should be brought back to the Backlog. Notice that the next sprint, **PRJB Sprint 2,** is listed at the top of the Backlog.
4. In the project sidebar, select **Reports** then select **Sprint Report**.
5. Notice that the Sprint Report includes a link for creating a Confluence retrospective page for the Sprint (select the **View linked pages** link). This allows for an excellent integration of the project work item/issue information in Jira and the team's project-related discussions. We do not work with Confluence in this course.
6. Examine the Sprint Report. Note: For this exercise, you completed the sprint quickly rather than in the two weeks assigned to the sprint.
    a. Your team estimated and completed three story points in this sprint, so the team's velocity for Sprint 1 was three story points. You can see this from the line that indicates your team completed all of the stories planned for this sprint.

   b. If you only created the stories from the previous lab directions, you should see the two stories under **Completed Issues** in the Status Report.
   c. If you created additional stories, they may be listed under Issues Not Complete.
7. Select the **Back to project** link at the top of the sidebar to get back to the project.

Congratulations, you have completed a sprint and completed this lab.

Lab 8 - Quick Search and Basic Search

Scenario: Ryan and team have now created a few issues, and would like to start working on them. Team members can assign issues to themself or others. Ryan explores the different searches to find issues to assign. If you need to change some fields on multiple issues, you can use the bulk change feature. Search allows you to easily find issues that match a certain criteria.

Estimated time: 15 minutes
In this lab, you will:
A. Perform quick searches
B. Perform basic searches
C. Work with search results
D. Make bulk changes

These instructions assume that you have completed the previous labs. If you have other projects, you can change the search to provide results for your projects.

A. Perform quick searches

1. Select **Backlog** from the sidebar menu.
2. Select in the **Search** icon/box in the upper right (you should see a magnifying glass) to view **Quick search**. You can use this field to search issues with fields of types text, board names, filter names, and project names. Notice there are tabs to view results from Jira and possibly Confluence. You will see the Atlassian applications for which you have licenses.
3. Select outside of the search box to return to the board view.
4. Press the **/** key on your keyboard. This is the keyboard shortcut for performing quick searches.
5. Search for "**item**". As you type, the search results will change.
   Note: You might see a suggestion/tip that a wildcard * was added to your search. You can close it.
6. Press **Enter**. You will be taken to the Filters area of Jira with the associated text-based search of issues. The Filters area applies to all projects in your cloud site.
7. Use quick search to search for "**item 2**".
8. Quick search for "**ITEM 2**" and verify that search terms are not case-sensitive.
9. Quick search for "**item AND 2**". The results should be the same as the previous search. The terms of a query are joined with AND by default.
10. Quick search for "**item NOT 1**". The NOT keyword should exclude the "**add item 1**" issues.

11. Quick search for "**item not 1**". This should return the "**add item 1**" issues. This is because "not" is in lowercase, and it is such a common word that it is excluded from the search (a reserved or stop word). This is the same as searching for "**item 1**".
12. In another browser window or tab, perform a general web search for "**Jira search syntax for text fields**". Select on the **Atlassian documentation**. Select on **Cloud** in the upper right. Scroll down to the "**Reserved words**" heading and verify that "and" and "not" are reserved words for searches of text fields. https://support.atlassian.com/jira-software-cloud/docs/search-for-issues-using-the-text-field/#Reserved-words
13. Back in **Jira**, perform any quick searches that interest you.

Congratulations, you have performed quick searches.

B. Perform basic searches

1. Select the **Filters** dropdown in the top navigation menu and select **View all issues**.
2. Select the **All issues** filter in the sidebar. You should be viewing all of the issues of the projects.
3. Verify that you are in the basic search:
   Under the **All Issues** heading, you should see a row of interface elements. To the right of the interface elements are the BASIC and JQL buttons. Make sure that **BASIC** is selected.
4. Select the **Project** dropdown to view the issues of any one of your projects.
5. Use the "**Search issues**" box in the basic search row to further limit your results. For example, enter the text “bug” in the search box. Press **Enter** to perform the search. Verify that the **NOT** keyword works in basic search. (You can just type **NOT bug** or try something else.)
6. Quick search (as you did earlier in the lab) for "**item**" and select **Enter**. You should be brought to basic search. Verify that the text that you entered is in the textbox.
7. Clear the existing search by selecting **Search issues** or **All issues** in the sidebar.
8. In the row of basic search elements, select on **More** and search for issues that have been updated (**Updated Date** field) in the last hour, day and week. Your results depend on when you performed the previous labs.
9. Perform any basic searches that interest you.

Congratulations, you have performed basic searches.

C. Work with search results

1. Clear all searches.
2. Use the **Views** icon to the far right of the basic search elements to toggle between **List View** and **Detail View**:

3. In **List View**, select the **Columns** dropdown on the right, to change the columns that are displayed in the results. Select **Restore defaults** to undo what you have changed.
4. Reorder the first two columns by dragging and dropping the column header. Change it back.
5. Select a **column header** for example **Reporter or Status** to sort by that column. Select the **column header** again to reverse the sorting.

Congratulations, you have learned to work with search results.

For Later
You do not have access to the standard lab users' email accounts in your Jira Cloud training instance. However, when you have access to your own or an account through your company, try this exercise.

- Do a quick search to get a small number of issues. Maybe Your Open Issues.
- Select the "**Share**" link/icon in the upper right. Here you can email the search (also known as a *filter*) to others who have access to the site. This does not email the dataset.

D. Make bulk changes

The bulk change feature that you are about to use is an easy way to change field values for multiple issues without having to perform the task one at a time for each individual issue.

1. Change the **Assignee** for all of the issues of the project:
   a. Use the basic search to search for all issues of your **projectA** project.
   b. Select the **More icon (...)** in the upper right and select **Bulk change all X issue(s)**. Don't confuse the **More icon (...)** with the +More link associated with the search.
   c. There are 4 steps in this process. In step 1, select the issues that are Unassigned. (If they are all assigned, you can change this exercise to unassigning them all). Select **Next** to move to the next step.
   d. In step 2, select **Edit Issues**. Select **Next** again.
   e. In step 3, check the **Change Assignee** checkbox and select **Assign to me** on the right. Select **Next** at the bottom of the page.
   f. In step 4, select **Confirm**.
   g. After the process completes, select **Done** or **Acknowledge** and verify that your bulk changes were made.

Congratulations, you have made bulk changes and completed this lab.

Lab 9 - Filters

Scenario: At this point, there are but a few issues in the projects. However, Ryan is planning ahead and knows there will eventually be hundreds of issues in each project. He will create filters to allow him to see, among other things, all of the issues assigned to him that are in progress at any time, as well as issues that he labeled. He will also create a query and save it as a filter so it can be used repeatedly.

Estimated time: 15 minutes
In this lab, you will:
A. Explore default filter queries.
B. Create a starred filter.
C. Explore quick filters.
D. Filter by label

A. Explore default filter queries

1. Make sure you're still on your **projectA** project.
2. From the top menubar, navigate to **Filters** → **View all issues**.
3. Select each named filter on the sidebar to view and execute each query.

Congratulations, you have explored the default filter queries.

B. Create a starred filter

1. From the top navigation menu, select **Projects** → **ProjectA** to get back to the project issues.
2. In your **projectA** project, change one of your issues to the **In Progress** status with an assignee of **Ryan Lee**.
3. In basic search, create and execute a query that searches for all issues with **In Progress** status assigned to the **Current User**.
4. Select **Save filter** next to Search at the top to save the query as a filter. Name the filter **My in progress** and select **Save**. After you create the filter, it should show under the **STARRED** section in the sidebar. You may need to refresh your browser to see it.
5. On the filters sidebar, select **View all filters** at the bottom of the sidebar. You should see your **My in progress** as a starred filter.
6. Select the **ellipsis (...)** icon to the right of your new filter and select **Edit**. If you want, view and change any metadata details and select **Save**.
7. Execute the filter by selecting it. Change the query slightly (for example, select a column header to change the ORDER BY) and re-save the filter.
8. Experiment with creating other filters.

Congratulations, you have created and edited a starred filter.

C. Explore quick filters

Scenario: Suppose Ryan wants to quickly see what issues on the kanban board are assigned to him.

1. View your **projectA** kanban board.
2. Select Ryan's avatar next to the **Search this board** field under Kanban board.
3. Does selecting an avatar restrict the results to issues assigned to Ryan, reported by Ryan, or both?
4. Either unselect **Ryan's avatar** or select **Clear filters** all to clear the filter.

What's the difference between the **Search this board** field and the **Search** field in the upper right?
The **Search this board** field does just that. It only searches the board for the search terms. The **quick search** field in the upper right will search the entire Cloud instance.

1. Use the **Search this board** field and enter **item**.
    a. Note how many issues are returned by the search.
    b. Which project(s) do these issues belong to?
2. Now, use the Search field at the top right and enter **item**.
    a. How many issues are in the results of this search? Is it the same as in the previous search?
    b. Which project(s)do these issues belong to? (Tip: You can add the **Column - Project** to view the Project the issues belong to.)
3. So, what's the difference between the two searches? The **Search** field at the top right searches all of Jira Cloud. The **Search this board** field searches on the selected board.

Select the other Quick filters located to the right of the avatars. These Quick filters will vary from Jira Cloud instances. Your Jira admin can create them.

1. Select all the other Quick filters listed to the right of the avatars and view the results.
    a. Can you select multiple filters at the same time? Yes
    b. If you select multiple filters simultaneously, are they 'OR' or 'AND'? They are 'AND'.
2. Select the **Clear all** link to clear the filters.

Congratulations, you have explored quick filters.

D. Filter by label

1. From the sidebar, navigate to **Issues**.
2. In the search bar, select **More +** then select **Labels**.
3. Select **refactor**. All of the issues that you assigned with the “refactor” label display.

Congratulations, you have filtered by label and completed this lab.

Lab 10 - Epics

Scenario: Ryan and team have been asked to work on a couple of new big features. Since the same team members are going to be working on different features, Ryan would like to organize the work according to features in epics. Now everyone on the team can easily view the work and progress made for each feature separately in its own epic.

Estimated time: 15 minutes
In this lab, you will:
A. Create an epic issue
B. Add issues to an epic
C. View an epic in the backlog
D. Complete an epic

A. Create an epic issue

1. View your **projectA** kanban board.
2. In your **projectA** project, click the **Create** button and create an issue.
    a. Ensure you select **Epic** for the **Issue type**.
    b. Epic Name: **Feature A**
    c. Summary: **add big feature A**
3. Select **Create** to create the feature.

Congratulations, you have created an epic issue.

B. Add issues to an epic

1. From the sidebar menu, select **Issues**.
2. Open the **Feature A** epic issue by selecting either the **Key** or the **Summary** for the issue.
3. Under the summary (**add big feature A**), select **Add a child issue**.
4. Create an issue:
    a. Type: **Story**
    b. Summary: **Epic A story 1**
    c. Select the **Create** button.
5. View your kanban board and notice that the epic name is shown on the card for the issue that you just created. (You may need to refresh the browser.)
6. Move the new story to the **Selected for Development** column.
7. Open the **add big feature A** epic issue and notice that the **Epic A story 1** issue is listed under Child issues.

8. Select the **+** at the end of **Child issues** to create another **story** in the epic named **Epic A story 2**. You can now see that your epic Feature A has two child issues.

Congratulations, you have added issues to the epic.

C. View an epic in the backlog

1. View your **projectB** sprint board.
2. Click the **Create** button and create an issue.
    a. Issue type: **Epic**
    b. Epic Name: **Feature B**
    c. Summary: **add big feature B**
    d. Select the **Create** button to create the issue.
3. Notice that cards for epic issues are no longer on the scrum board. On a scrum board, we can manage epics from the backlog.
4. Select **Backlog** from the sidebar.
5. Select the **Epic** drop-down to the right of the quick filters.
6. Enable the **Epic** toggle. This opens the **Epic panel**. Notice that you can create epics from the Epic panel.
7. Expand the **add big feature B** epic if it is collapsed. You can see some stats about the epic here. Notice there are no issues in this epic.
8. Select **Create issue** from the Epic panel and create two **Story** issues with summaries of **Epic B story 1** and **Epic B story 2**.
9. Refresh the page.
10. Expand the **Epics** panel if needed, you can see the epic, **add big feature B,** which now contains two issues, **Epic B story 1** and **Epic B story 2** which can now also be seen in the backlog.
11. Notice you can also view the epic's details or mark the epic as done from the Epic panel.

Congratulations, you have viewed the epic in the sprint backlog.

D. Complete an epic

1. View your **projectA** kanban board.
2. The team is starting work on feature A so move the **add big feature A** to **In Progress** lane.
3. Move the **Epic A story 2** issue to the **Selected for Development** lane.
4. From the board, move the issues of the **Feature A** epic (**Epic A story 1** and **Epic A story 2**) to the **Done** column. Note that you are not prompted to automatically close the epic, as with subtasks.
5. Select the **add big feature A** issue to view it.
6. Change the epic issue's status to **Done**.

Congratulations, you have completed an epic and finished this lab.

Lab 11 - Dashboards

Scenario: Ryan and team are proud of their progress. He would like to present a customized view of the work. He will add a dashboard to visually show his work in one place. He will add some gadgets to his dashboard to display some aspect of the work on the projects.

Estimated time: 10 minutes
In this lab, you will:
A. Explore the default dashboard
B. Create a dashboard

A. Explore the default dashboard

1. In the top navigation bar, select **Dashboards** > **View all dashboards**.
2. Select the **Default dashboard** and explore the different parts of it.

Congratulations, you have explored the default dashboard.

B. Create a dashboard

1. Select the **ellipsis (...)** icon in the upper right of the default dashboard. Select **Copy** or **Copy dashboard**.
2. Name the dashboard **Ryan's dashboard**.
3. Explore the access/sharing options for **Viewers** and **Editors** of the dashboard. Dashboards can be private/personal (not shared) or shared with others. You can keep this dashboard private/personal.
4. Select **Save** to create the dashboard.
5. Select the **Edit** button in the upper right corner to edit the dashboard. (Dashboards can be edited in Edit mode only.)
    a. Select the more icon (**...**) in the gadget with "Welcome to Jira" and select **Delete**. Confirm **Delete**.
    b. Select the more icon (**...**) in the gadget with "Projects" and select **Delete**. Confirm **Delete**.
    c. Add a **Sprint Health Gadget.**
        i. Select the **Add gadget** button if needed.
        ii. In the Add a Gadget panel **add** the **Sprint Health Gadget**.
        iii. Close **Add a Gadget** panel.
        iv. Confirm the gadget is configured to show your current **projectB** sprint, (PRJB Board).

v. Leave the **Sprint** set to **Next Sprint Due (auto)**. This will always show the current sprint (if any).
vi. Select **Save** to save the gadget.

d. Select **Done** to save the dashboard.

6. Start the sprint.
   a. Navigate to the **Backlog** for the **projectB.**
   b. Move issue(s) from the Backlog to sprint (probably the **RJB Sprint 2**).
   c. Select **Start sprint**. Some issues have to be assigned to a sprint in order to start it.
   d. Confirm the sprint by selecting **Start**.
7. Add a **Sprint Burndown Gadget**.
   a. Navigate back to Ryan's dashboard.
   b. Select **Edit** to edit the dashboard again.
   c. Select the **Add gadget** button in the upper right if needed.
   d. In the Add a Gadget panel **add** the **Sprint Burndown Gadget**.
   e. Close **Add a Gadget** panel.
   f. Confirm the gadget is configured to show your current **projectB** sprint, (PRJB Board).
   g. Leave the **Sprint** set to **Next Sprint Due (auto)**. This will always show the current sprint (if any).
   h. Select **Save** to save the gadget.
8. Select the **Add gadget** button again and explore adding other gadgets to your dashboard.

Congratulations, you have created a dashboard.

(Optional) Lab 12 - Capstone project

Estimated time: 20 minutes
As **Ryan Lee**, you and your team use a sprint project named **App Development**. You are starting work on a project to create an iOS app. Add the needed Jira elements accordingly. The requirements can be found in the chart below. The step-by-step instructions are not included here as they were in the previous labs. Use what you have learned to complete the project.

Step	Requirements
1	• As Ryan Lee (**rlee**), create an **epic** called **iOS App** from the sprint backlog. • Open the epic and **assign** it yourself (Ryan lee).
2	Create two child issues within the epic: • One **story** called **Develop feature A** • One **bug** called **Blue screen of death**
3	Create two **subtasks** under the story: • **Feature A1** • **Feature A2**
3	Assign the issues you created: • Assign the story and its subtasks to **yourself**. • Assign the bug to **Alana Grant**.
4	Create a **filter** for issues **assigned to you** that are **In Progress**.
5	**Star** the filter you created.
6	**Start** the sprint.
7	Move your issues through the columns until they are all **Done**.
8	**End** the sprint.
10	Edit Ryan's default **dashboard** to include the **Issue Statistics** gadget.

Step	Requirements
11	(Optional) Explore other features of Jira that have not been covered in the course. Use what you have learned in this course, Atlassian documentation and web searches to help you.

Congratulations, you have completed all the labs in this course!

Lab 13 - Lean and Agile Principles

There are no labs for this module.