



JIRA INTRODUCTION 2015

AGENDA

1. What is JIRA?
2. JIRA Advantages and disadvantages
3. Workflow in JIRA
4. What is an Issue?
5. Standard actions on issue
6. Search for an issue
7. Timesheet
8. Setting up e-mail notification
9. Boards in JIRA



1. WHAT IS JIRA?

WHAT IS JIRA?

JIRA is ...

- ✓ a web Atlassian tool
- ✓ the tracker for team planning
- ✓ configurable and extendable tool

JIRA ...

- ✓ adapts to business processes
- ✓ maintains your historic data
- ✓ used to prioritize, assign, track, discuss, report and watch issues\tasks



2. JIRA ADVANTAGES AND DISADVANTAGES

JIRA ADVANTAGES AND DISADVANTAGES

ADVANTAGES

- Team work facilitation
- Full visibility of the supported processes for the team and process/unit stakeholders
- Planning
- Time-reporting
- Tasks prioritizing
- Clear KPIs for People Management

DISADVANTAGES

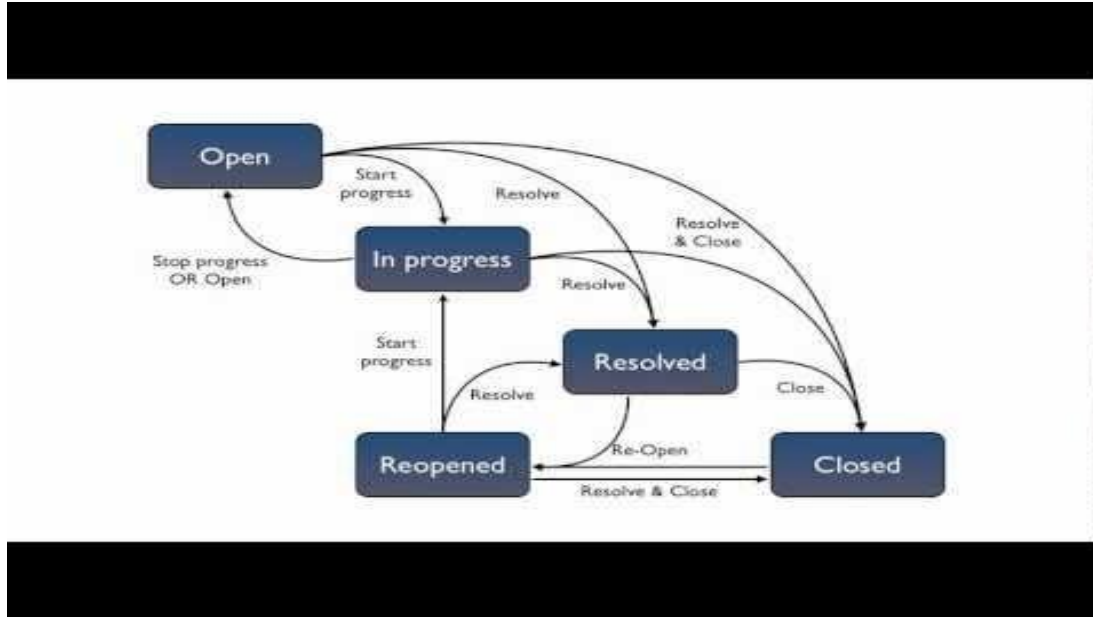
- JIRA Performance
- Lack of training on project management
- Time and efforts spent on «Getting acquainted stage»



3. WORKFLOW IN JIRA

WORKFLOW IN JIRA

A JIRA workflow is the set of statuses and transitions that an issue goes through during its lifecycle.



A scenic landscape featuring a calm lake in the foreground, with several ice floes scattered across its surface. In the background, dark, forested mountains rise under a dramatic, cloudy sky. The sun is low on the horizon, creating a soft glow and reflecting on the water. A blue banner with white text is overlaid on the middle of the image.

4. WHAT IS AN ISSUE?

WHAT IS AN ISSUE?

Issue - any task that requires an action from a person.

Issue types:



Bug – a problem which impairs or prevents the functions of the product.



Task – a task that needs to be done.



Sub-task - are useful for splitting up a parent issue into a number of smaller tasks that can be assigned and tracked separately.



Story - in JIRA Agile, a story is represented as an issue, and individual tasks within the story are represented as sub-task.



Epic - An epic captures a large body of work. It is essentially a large user story that can be broken down into a number of smaller stories. It may take several sprints to complete an epic.

A photograph of a dense forest with tall, slender trees and vibrant green foliage. Sunlight streams through the canopy, creating a bright, airy atmosphere with visible light rays. The text is overlaid on a teal banner in the lower-left quadrant.

5. STANDARD ACTIONS ON ISSUE

STANDARD ACTIONS ON ISSUE

- Create
- Edit
- Assign
- Comment
- Log work
- Attach
- Link
- Clone
- Delete

The screenshot shows the JIRA interface for an issue titled 'TEST' in the 'EPM-HRM' project. The issue ID is 'EPMHRM-2117'. The top navigation bar includes 'Dashboards', 'Projects', 'Issues', 'Risks', 'Tempo', 'Agile', 'Structure', and 'Tests'. The issue details section includes 'Type: Mind Map', 'Priority:', 'Affects Version/s:', 'Component/s:', and 'Labels:'. The description section has a 'Click to add desc' button. The 'Tempo' section shows the date range '01/Jul/15 - 31/Jul' and a 'Date' field. The 'Structure' section is set to 'Global'. The 'Activity' section shows 'All' and 'Comments' tabs, with a note 'There are no comments'. A dropdown menu is open over the 'More' button, listing actions: 'Log Work', 'Log Work', 'Plan Time', 'Start Tracker', 'View Worklogs', 'Agile Board', 'Rank to Top', 'Rank to Bottom', 'Attach Files', 'Attach Screenshot', 'Add Vote', 'Voters', 'Stop Watching', 'Watchers', 'Create Sub-Task', 'Convert to Sub-Task', 'Move', 'Link', 'Clone', 'Labels', and 'Delete'. The 'Log Work' and 'Attach Files' options are highlighted with red boxes. The 'Move', 'Link', and 'Clone' options are also highlighted with red boxes. The 'Comment' button is visible at the bottom left of the dropdown menu.

CREATING AN ISSUE

In this lesson, you will learn how to create an issue in JIRA. The **Create** button is available from every page in JIRA.



Let's create an issue now.

Click **Create** button at the top of the screen or just type **C**.

CREATING AN ISSUE

Create Issue Configure Fields

Project*

Issue Type*

Epic Name*

Provide a short name to identify this epic in the GreenHopper boards.

Summary*

Priority

Due Date

Component/s

Start typing to get a list of possible matches or press down to select.

Affects Version/s

Start typing to get a list of possible matches or press down to select.

Fix Version/s

Start typing to get a list of possible matches or press down to select.

Assignee

Create another

1. **Project.** Every issue is associated with a project.
2. **Issue Type.** This field allows you to select the kind of issue you want to create, such as a bug or task, etc.
3. **Issue Summary.** Every issue requires a summary. A summary should be a very brief summation of the issue. The summary acts as the title of the issue.
4. **Set Priority.** You can set the priority of this issue. Setting the priority can help your team during the triage process.
5. **Set Due Date.**
6. **Affects Version.** This field is used to tell people which version of the project this new issue relates to.
7. **Assignee.** Here you can choose whom to assign the issue to.
8. **Enter Issue Description.** Here's where you can describe the issue in as much detail as you'd like.
9. **Create.** Once you click 'Create', your new issue will be added to JIRA.

ISSUE SUMMARY

All Task (sub-task) fields must be fulfilled in **English** language only.

All Tasks should be named according to the rule:

“WHERE_WHAT_WHEN”

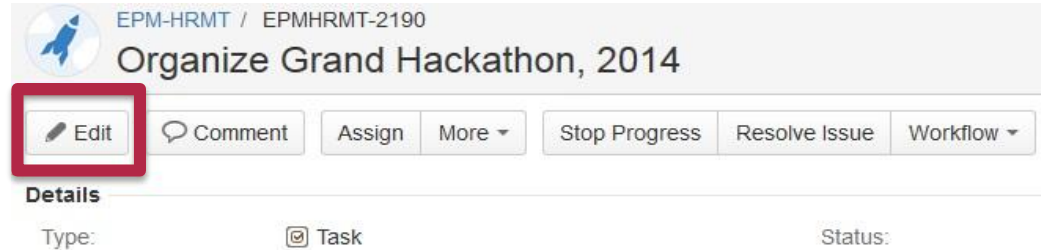
For example: "IT Services_Summer Party_09-2015".

For **“Ad-hoc”** Tasks (non-hosted tasks) don't forget to add verb to the title.

For example: "IT Services_organize Summer Party_09-2015".

EDITING AN ISSUE

1. Click the **Edit button** (at the top left on the “view issue” page).



2. Hover your mouse over a field and **click the pencil icon** to edit it inline.
3. Just type **E**.

LOG WORK ON ISSUE

Log Work

Time Spent* (eg. 3w 4d 12h) ⓘ
An estimate of how much time you have spent working.

Date Started* ⓘ

Remaining Estimate

- Adjust automatically
the estimate will be reduced by the amount of work done, but never below 0.
- Leave estimate unset
- Set to (eg. 3w 4d 12h)
- Reduce by (eg. 3w 4d 12h)

Work Description

🔒 - Viewable by All Users

[Find more time-tracking add-ons...](#)

LOG WORK ON ISSUE

To log work use the following format:

- **w** - weeks
- **d** - days
- **h** - hours
- **m** - minutes

EDITING AND DELETING A WORK LOG ENTRY

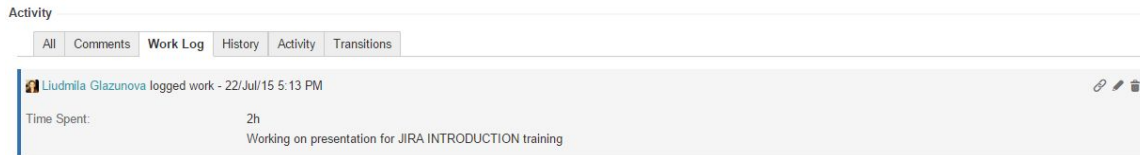


EDITING A LOG WORK

- Open the necessary issue Tempo section
- Click the pencil icon
- Make the appropriate changes
- Click Log to return to the issue, and verify that changes were made.

DELETING A LOG WORK

- Open the necessary issue Activity section
- Select Work Log tab
- Click the Delete icon
- Click Delete to confirm the deletion and return to the issue.
- Verify that the issue's Work Log tab no longer displays the work log entry that you just deleted.




TIME TRACKING

Original Estimate (blue) – the amount of time originally anticipated to resolve the issue.

Remaining Estimate (orange) – the remaining amount of time currently anticipated to resolve the issue.

Time Spent (green) – the amount of time logged working on the issue so far.




People

Assignee:  Liudmila Glazunova
Reporter:  Liudmila Glazunova
Votes: 0
Watchers:  [Stop watching this issue](#)

Dates

Created: Yesterday
Updated: Just now

Time Tracking

Estimated:  16h
Remaining:  14h
Logged:  2h

Collaborators

Liudmila Glazunova 2h / 0h

CREATING A SUB-TASK

Sub-task issues are useful for splitting up a parent issue (Task) into a number of smaller tasks that can be assigned and tracked separately. You need to create Sub-Task when:

- When **different people** are responsible for execution process of one Task
- When we have **different business results** related to the same Task

HOW TO:

- Navigate to the issue you would like to be the parent issue of the sub-task you are about to create.
- Select **More** and **Create Sub-Task**.
- Fill in the details as needed, and then click **Create** at the bottom.

Sub-tasks have all the same fields as standard issues, e.g. Summary, Description, Reporter, Assignee, Status. Note that sub-tasks have a different set of issue types from the standard issue types.



The screenshot shows a Jira issue interface with a 'More' dropdown menu open. The menu items are:

- Log Work
- Mind Map
- Log Work
- Plan Time
- Start Tracker
- View Worklogs
- Agile Board
- Rank to Top
- Rank to Bottom
- Attach Files
- Attach Screenshot
- Add Vote
- Voters
- Stop Watching
- Watchers
- Create Sub-Task** (highlighted with a red box)
- Convert to Sub-Task

At the bottom of the dropdown, there is a section labeled '> Structure: Global'.

RESOLVING AN ISSUE

1. Press **Resolve** button in the upper panel bar
2. Move the necessary Task from one column to another (Tracking board)
3. And don't forget about Issue Resolution. JIRA by default will mark an issue to be Unresolved when the resolution field is not having any value on it.
4. Adding comments to an issue is a useful way to record additional detail about an issue, and collaborate with team members.

Start Progress **Resolve Issue** Close Issue

0 of 3 In Progress 0 of 28 Resolved

EPM/IRM-2117
TEST

Resolve Issue

Resolving an issue indicates that the developers are satisfied the issue is finished.

Resolution* Please select... ?

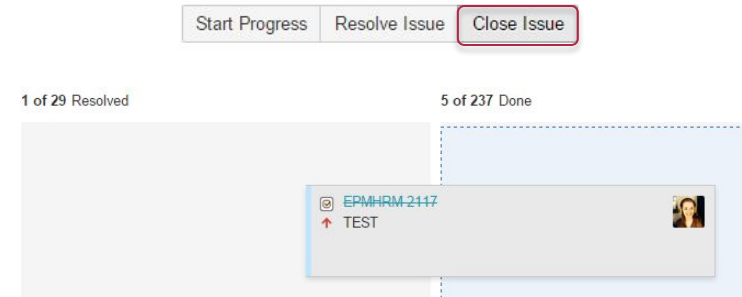
Fix Version/s

Start typing to get a list of possible matches or press down to select.

Comment

CLOSING AN ISSUE

1. Choose “Close Issue” button in the upper panel bar
2. Move the necessary Task from one column to another (Tracking board)
3. Peer review is **obligatory** during **1st** month of JIRA usage. After 1st month – HR Manager is responsible for chosen the appropriate option for his\her team.
4. If there is **only one HR** for the project (Assignee=Reporter) then she or he is still responsible person for the whole Quality Control process



REOPEN AN ISSUE

1. Open the resolved or closed JIRA issue you wish to reopen
2. Select More -> Reopen Issue
3. Fill in Comment field
4. Click on “Reopen issue” button
5. Change Due Date

The screenshot shows the JIRA interface for issue EPM-HRM / EPMHRM-2117. The issue title is 'TEST'. Below the title are buttons for 'Edit', 'Comment', 'Assign', 'More', 'Close Issue', and 'Reopen Issue'. The 'Reopen Issue' button is highlighted with a red border. Below the buttons is a 'Reopen Issue' dialog box. The dialog box contains a message: 'Reopening an issue indicates that it has not been completed, and should be looked at again.' Below the message is a 'Fix Version/s' dropdown menu. Below the dropdown menu is a 'Summary' field containing the text 'TEST'. Below the summary field is a 'Comment' field with a rich text editor toolbar. The toolbar includes options for 'Style', 'B', 'I', 'U', 'A', 'A', 'Link', 'Image', 'List', 'List', 'Image', and '+'. Below the comment field is a 'Viewable by All Users' checkbox. At the bottom right of the dialog box are 'Reopen Issue' and 'Cancel' buttons.

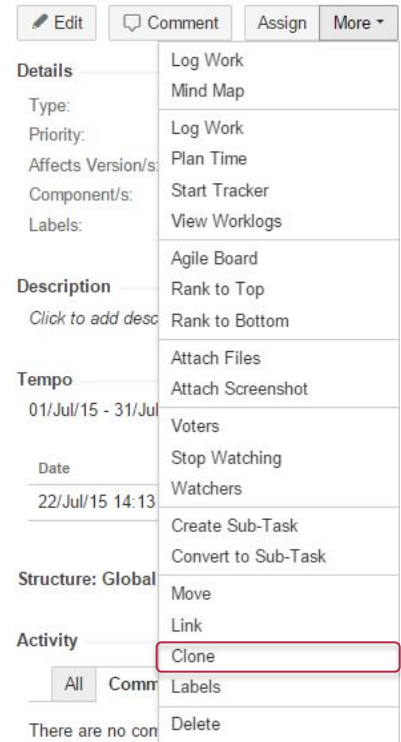
CLONING AN ISSUE

Cloning, or copying, an issue lets you quickly create a duplicate of an issue within the same project. The clone issue is a replica of the original issue, containing the same information stored in the original issue – e.g. Summary, Affects Versions, Components, etc. The clone issue can also be linked to the original issue. A clone issue is a separate entity from the original issue.

1. Open the JIRA issue you wish to clone
2. Select More
3. Select Clone
4. You need to edit the clone issues Summary and Due Date

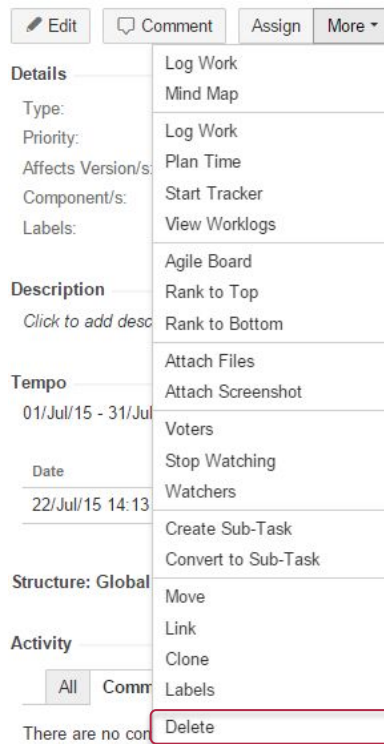
You can include or not to include:

- Sub –Task
- Links
- Attachment



DELETING AN ISSUE

- On your Tracking Board select the issue that you want to delete
- Select More
- Select Delete in the List

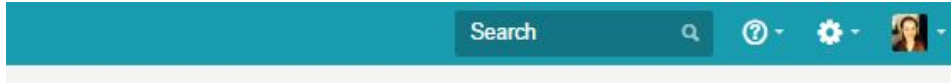




6. SEARCH FOR AN ISSUE

SEARCH FOR AN ISSUE

The quickest, simplest, and easiest way to search for issues is the Quick Search bar, which is located in the universal header.



Jump to an issue. If you type in an issue's key, you'll jump straight to that issue.

Smart Querying. JIRA recognizes key terms and uses a simple syntax to search for issues. For example, typing in 'my open bugs' returns all issues assigned to you that haven't been resolved.

Free-text searching. You can search for any word within the issue(s) you are looking for, provided the word is in one of the following fields: Summary, Description, Comments.

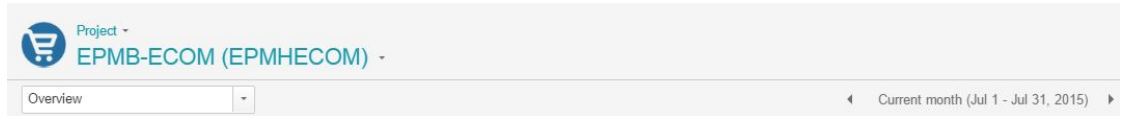
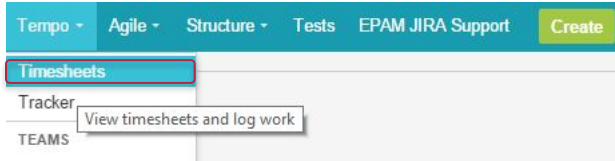
Searching JIRA issues from your browser's search box. If you are using Firefox or Internet Explorer 8, you can add your JIRA site as a search engine/provider via the dropdown menu next to the browser's search box. Once you add your JIRA site as a search engine/provider in your browser, you can use it at any time to conduct a Quick Search for issues in that JIRA site.



7. TIMESHEETS

TIMESHEETS

Select Tempo->Timesheet->Select necessary type of timesheet



Select necessary time period

The screenshot shows a detailed timesheet grid for the project 'EPMB-ECOM (EPMHECOM)'. The grid displays planned and worked hours for each day of the month (July 1-31, 2015). The columns represent days of the week, and the rows represent different categories of work. A 'Log Work' button is visible in the top right corner of the grid area.

P	%	Σ	01 W	02 T	03 F	04 S	05 S	06 M	07 T	08 W	09 T	10 F	11 S	12 S	13 M	14 T	15 W	16 T	17 F	18 S	19 S	20 M	21 T	22 W	23 T	24 F	25 S	26 S	27 M	28 T	29 W	30 T	31 F		
Planned		43.75	4.5	4.5				5	3.75	4.75	3.5	3			3.75	4.5	1	3	2.5			8	8.55	7.5											
100%		127.55						10.3	13.2	9	10.25	9.25	1.5		11.05	11.2	11.1	8	8.65			8	8.55	7.5											
100%		17.25	15						0.75	0.75												0.75													
100%		37	7						4.5	4	1.75				4.25	4		5.25	1.75				3	1.5											
100%		2		1				1																											
100%		34						11		8		6.5						3				5.5													
Daily hours total:		26.5	5.5					27.3	22.2	21.75	18.5	20.5	1.5		19.05	19.7	12.1	19.25	12.9			14.25	11.55	9											
Weekly hours total:							32						111.75								83														
Planned hours total:																																			
Total																																			
Worked																																			
Planned																																			

Timesheets displays useful time tracking information on issues for a particular project, team, account, user, etc.

A man with short brown hair, wearing a dark blue peacoat with a fur collar and a brown messenger bag, is standing on a train platform. He is looking down at a smartphone in his hands. The platform has a white train car on the left and a wooden structure with a red roof on the right. The background is slightly blurred, showing other people and the train tracks.

8. SETTING UP EMAIL NOTIFICATION

RECEIVING SEARCH RESULTS VIA EMAIL

JIRA enables you to subscribe to an issue [filter \(a saved search\)](#). JIRA will then run the search according to your specified schedule, and will email the results to you.

You can specify when and how often you would like to receive the search results, e.g. 'Every hour between 9.00AM-5.00PM, Monday-Friday', or 'The last Friday of every month at 7.00AM'.

1. Choose Issues > Manage Filters.
2. Locate the filter you are interested in and click on its Subscribe link.
3. Select one of the following types of schedule.
4. Click **Subscribe**.

Filter Subscription

Recipients

Schedule Daily
 Days per Week
 Days per Month
 Advanced

Interval at

The current server time is 03/Apr/13 2:39 AM - Greenwich Mean Time

Email this filter, even if there are no issues found

Manage Filters

Favourite

- My
- Popular
- Search

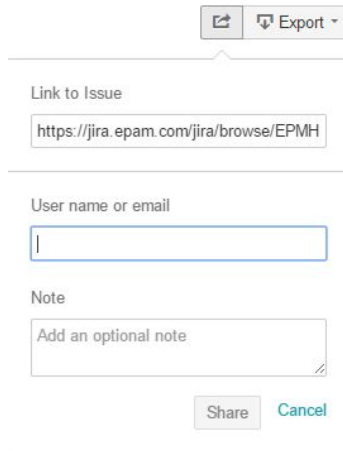
Favourite Filters

Filters are issue searches that have been saved for re-use. This page shows you all your favourite filters.

Name	Owner	Shared With	Subscriptions	
★ Browse Project Epics for ADG	Susan Griffin (sgriffin)	• Shared with all users	None - Subscribe	⚙
★ Ignite docs	Susan Griffin (sgriffin)	• Private filter	None - Subscribe	⚙
★ Kickass docs	Susan Griffin (sgriffin)	• Private filter	None - Subscribe	⚙
★ PDL Needs Docs	Susan Griffin (sgriffin)	• Shared with all users	None - Subscribe	⚙
★ PDL-Page	Susan Griffin (sgriffin)	• Private filter	None - Subscribe	⚙
★ Red Nerd	Susan Griffin (sgriffin)	• Private filter	None - Subscribe	⚙
★ The Red Nerds need modifications	Susan Griffin (sgriffin)	• Shared with all users	None - Subscribe	⚙

SHARING AN ISSUE

1. View the issue you want to share.
2. Click the Share button at the top-right or simply type **S**.
3. Specify JIRA users.



The screenshot shows the 'Share' dialog box in JIRA. At the top right, there are two buttons: a share icon and 'Export'. Below these are three input fields: 'Link to Issue' containing the URL 'https://jira.epam.com/jira/browse/EPMH', 'User name or email' which is empty, and 'Note' containing the placeholder text 'Add an optional note'. At the bottom right, there are two buttons: 'Share' and 'Cancel'.

WATCHING AN ISSUE

1. Open the necessary issue.
2. Click Start watching this issue link.
3. Select More Actions > Watchers to open the Watchers page.

[← Back to Issue](#) [Stop Watching](#)

Watchers

Add user(s) to watch list:

Start typing to get a list of possible matches.

[Add](#)

A close-up photograph of a woman with dark hair, wearing a blue and white plaid shirt, focused on working on a wooden board. She is holding a pencil in her right hand and appears to be drawing or writing on the board. The background is softly blurred, showing what looks like a workshop or office environment with wooden walls and some equipment. A teal banner with white text is overlaid on the left side of the image.

9. BOARDS IN JIRA

KANBAN BOARD

Kanban is a catalyst for change through small, incremental improvements to your existing process - be it scrum or otherwise. Rooted in lean manufacturing, Kanban is a signaling system that can be effectively applied to software development, DevOps, IT operations, HR processes and many other processes.

The screenshot shows a Jira Kanban board with the following details:

- Board Name:** EPMH-MSTD People Management Tracking board
- Navigation:** Backlog, Kanban board, Reports, Board, View in Tempo
- Quick Filters:** Recognition, Training, Survey, RM Meetings, HR Training, Reporting, Other tasks, Event, Action Items, ERR Check, Assessment support, Dismissal, Adaptation, Only My Issues, Recently Updated
- Column Statuses:** 41 To Do, 29 In Progress, 173 Resolved, 430 Done
- Issues:**
 - To Do:**
 - EPMHMSTD-505: To improve of internal communication process
 - EPMHMSTD-566: <https://jira.epam.com/jira/browse/EPMHMSTD-505>
 - EPMHMSTD-681: MSTD_Adaptation talk-Yaraslau Shabanets1_2015-07-28
 - In Progress:**
 - EPMHMSTD-4: "Welcome to MSTD" presentation
 - EPMHMSTD-11: QPF & UA processes design & communication for MSTD.
 - EPMHMSTD-507: QPF & ASMT Assistance
 - Resolved:**
 - EPMHMSTD-678: MSTD-BA_Adaptation talk-Natallia Ivaka1_2015-07-21

SCRUM BOARD

Teams who use scrum plan work in *sprints*, short blocks of time in which the team can estimate, and return value back to the customer. Software development teams, as well as teams in other industries, use scrum to deliver complex solutions in a structured, predictable way.

The product owner manages the *backlog*, ensuring the team is working on the highest-priority items first. With JIRA Agile, the team can organize stories in sprints, in larger epics, and across release versions.

The screenshot shows the 'EPM-HRM Sprint planning Tanya' interface. On the left, there are navigation menus for 'VERSIONS' (Epm-Hrm1, Copernicus-1.4, Copernicus-1.5, Copernicus-1.6) and 'Issues without versions'. The main area displays a list of issues under the 'Custom workflows (30.03-10.04)' sprint. Issues include 'EPM-HRM-1737 block the possibility to use any of EPMH projects for direct costs in CTC', 'EPM-HRM-1949 KPI review', 'EPM-HRM-1893 Attrition/Dismissal report implementation on Copernicus', 'EPM-HRM-1932 Custom Adaptation workflow implementation in JIRA', 'EPM-HRM-1955 Custom Exit management workflow implementation in Jira', 'EPM-HRM-1894 Create announcement letter for global rollout', 'EPM-HRM-1443 EPMH-LXD project set up', 'EPM-HRM-1801 Include EPMA-CMS (Dobrodel) unit into PMMP', 'EPM-HRM-1460 SLA creation', 'EPM-HRM-1732 Inform EPMH coordinators about new version of Copernicus', and 'EPM-HRM-1725 Upgrade EPMHRM wiki'. A 'Backlog' section at the bottom shows 'EPM-HRM-1572 users cannot delete tasks related to KPI (risk of cheating)'. The interface includes filters for 'Only My Issues' and 'Recently Updated', and a 'View in Tempo' option.

The screenshot shows the 'EPM-HRM Sprint planning Tanya' interface in 'Backlog' view. The backlog is organized into columns: 'To Do', 'In Progress', and 'Done'. The 'To Do' column contains three items: 'EPM-HRM-1932 Custom Adaptation workflow implementation in JIRA', 'EPM-HRM-1951 Investigate the possibility and to implement custom adaptation workflow in JIRA', and 'EPM-HRM-1955 Custom Exit management workflow implementation in Jira'. The 'In Progress' column is empty. The 'Done' column contains four items: 'EPM-HRM-1737 block the possibility to use any of EPMH projects for direct costs in CTC', 'EPM-HRM-1801 Include EPMA-CMS (Dobrodel) unit into PMMP', 'EPM-HRM-1725 Upgrade EPMHRM wiki', and 'EPM-HRM-1894 Create announcement letter for global rollout'. The interface includes filters for 'Only My Issues' and 'Recently Updated', and a 'View in Tempo' option.

USEFUL INFORMATION

1. Atlassian University - <https://university.atlassian.com/2.0/>
2. JIRA Documentation -
<https://confluence.atlassian.com/display/JIRA/>

If you have any questions - do not hesitate to contact us:

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THANK YOU!