

Jira – Quick Reference

User Manual (Jira 5.0)

Document Type: **User Manual**

Prepared by: **Project Managment Office**
Projektna.pisarna@adacta.si

For: **Adacta d.o.o.**
Leskoškova 9d, 1000 Ljubljana
www.adacta.si

Version: 1.0
Date: Ljubljana, 27. 09. 2012

Table of Contents

1	Introduction.....	3
2	Access	3
2.1	Log In	3
3	Concepts.....	3
3.1	Issue.....	3
3.2	Project	4
3.3	Issue Workflow.....	4
4	Jira - Basic	4
4.1	Working with Projects	5
4.2	Working with Issues	6
4.2.1	Create New Issue.....	6
4.2.2	Issue Overview	9
4.2.3	Edit Issue.....	9
4.2.4	Comment Issue.....	9
4.2.5	Attach File.....	9
4.2.6	Attach Screenshot	10
4.3	Issue Lifecycle, Workflow and User Roles	10
4.4	Search Issue.....	13
4.4.1	Quick Search	13
4.4.2	Advanced Search	14
4.4.3	Save Filter	15
5	Jira Support.....	15

1 Introduction

Jira is a Web tool that Adacta is using for issue management (e.g. bug reporting, task assignments, requesting new features, questions, improvement proposals). Jira is a product of Atlassian Software Systems adapted to Adacta's needs.

2 Access

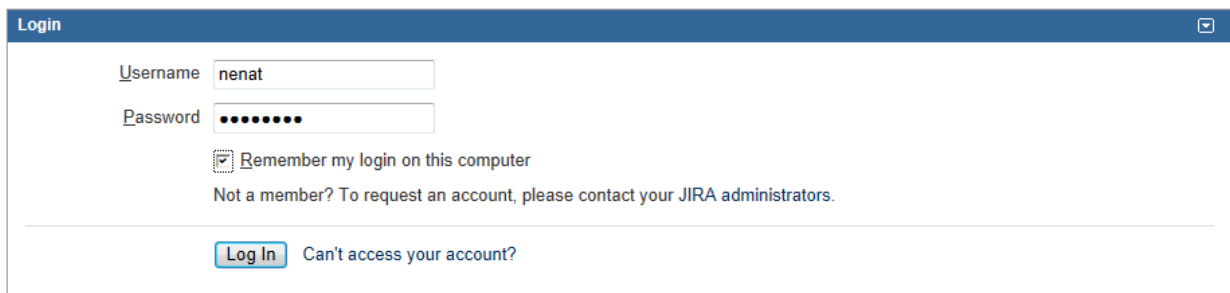
Jira can be access on the following Web address:

<https://jira.adacta-group.com/>

2.1 Log In

To use Jira you need username and password that has been given to you by Adacta's Project Management Office (projektna.pisarna@adacta.si). To log in, do the following:

1. Enter username and password in **Username** and **Password**.
2. If you want to be automatically logged in the next time you are using Jira, check **Remember my login on this computer**.
3. Click **Log in**.



The screenshot shows a web browser window titled "Login". It contains a form with the following elements: a "Username" field with the text "nenat" entered; a "Password" field with ten black dots; a checked checkbox labeled "Remember my login on this computer"; a link that says "Not a member? To request an account, please contact your JIRA administrators."; and a "Log In" button next to a link that says "Can't access your account?".

Figure 1 – Log in

3 Concepts

3.1 Issue

Different organizations and within them different project use Jira for tracking and management of various issue types (reported by internal or/and internal Jira users). At Adacta, we typically use Jira for bug reporting, various project related questions, assignment of project tasks, and support requests.

3.2 Project

Each issue belongs to one project. In Adacta's case, we use Jira for external implementation and support projects and internal development and organizational projects, respectively. Each project in Jira has its name and key (ID). The project key is a part of the issue key.

3.3 Issue Workflow

The workflow is transition of the issue through various states of its life cycle (from its creation to closure).

4 Jira - Basic

After successful login Jira's dashboard is displayed. The dashboard can be customized to reflect needs of a particular project. The dashboard enables a quick approach to various contents:

1. **Projects** – your projects;
2. **Favorite Filters** – list of saved search filters;
3. **Assigned to Me** – list of issues assigned to you;
4. **Issues in progress** – list of opened issues;
5. **Quick Links** – quick links such as:
 - a) resolved issues that you as a reporter need to check and either close or reopen (**My Unresolved Reported Issues**);
 - b) creation of a new issue (**Create Issue**);
 - c) search of existing issue (**Search for Issues**);
 - d) overview of projects (**Browse Projects**).

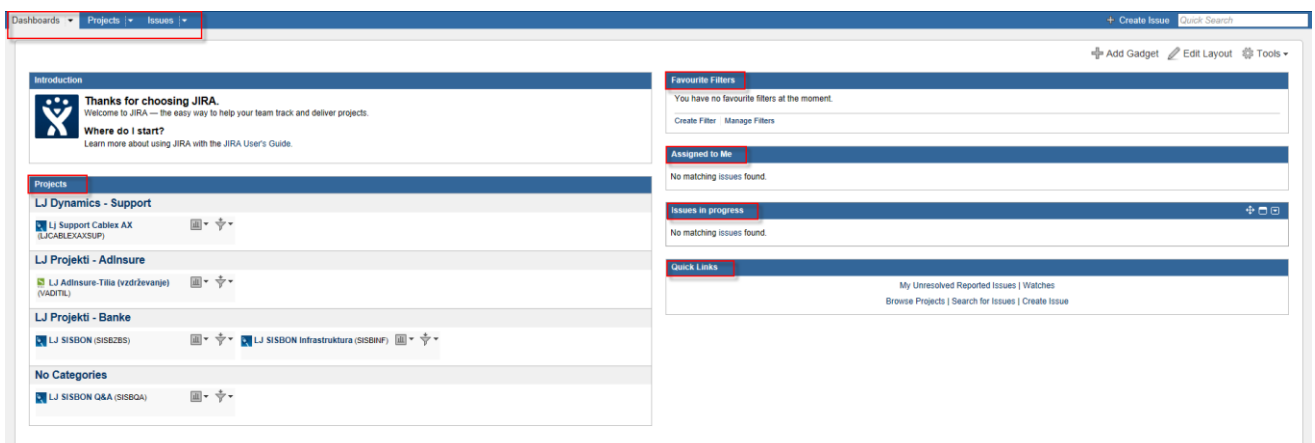


Figure 2 – Jira's Dashboard

NOTE Some gadgets (i.e. portlets) from old Jira are maybe no longer supported in Jira 5.0. If it happens that you have such a gadget on your dashboard, remove it by clicking first the downward pointed arrow in the upper right corner of the gadget window and then **Delete**. Consult your Adacta project manager about a possible replacement.

4.1 Working with Projects

To overview your project:

1. In the main Jira menu click **Projects** and select the project.
or
Click the name of the project on the Jira's dashboard.

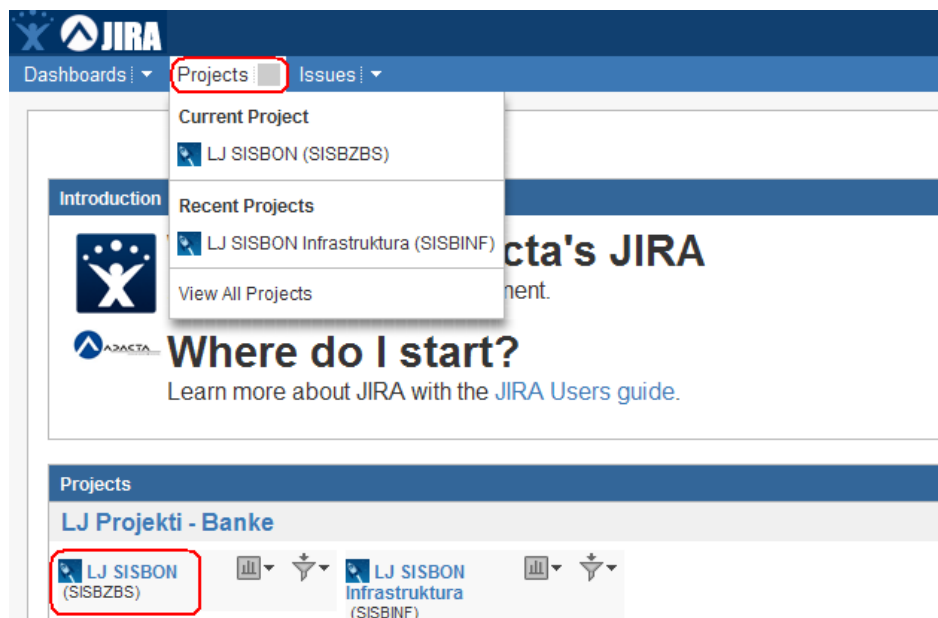


Figure 3 – how to access your projects

2. Jira displays project details:
 - o **Summary** tab shows basic data of the project and some predefined filters to view project issues.
 - o **Issues** tab presents issue statuses in a graphical way.
 - o **Component** tab shows project components (subparts).

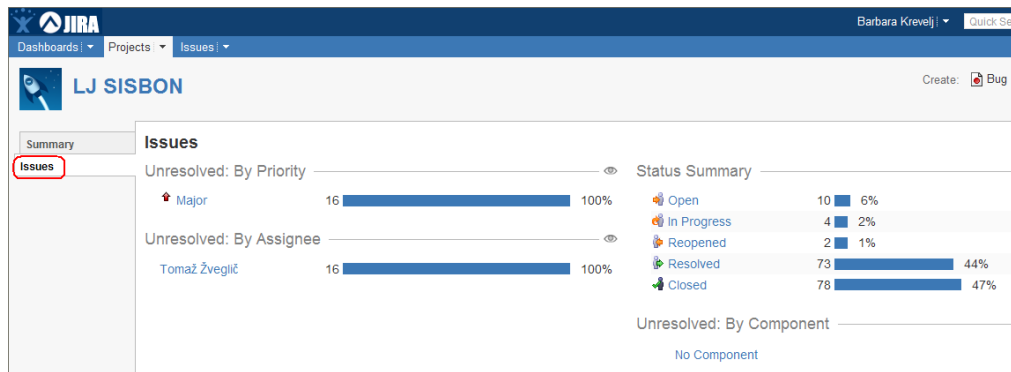


Figure 4 – project overview (issues)

4.2 Working with Issues

To manage project issues:

1. In the main menu click **Issues**.
2. Dropdown menu opens that contains the following commands:
 - **Search for Issues;**
 - **Create Issue;**
 - **Recent Issues;**
 - **Manage Filters.**

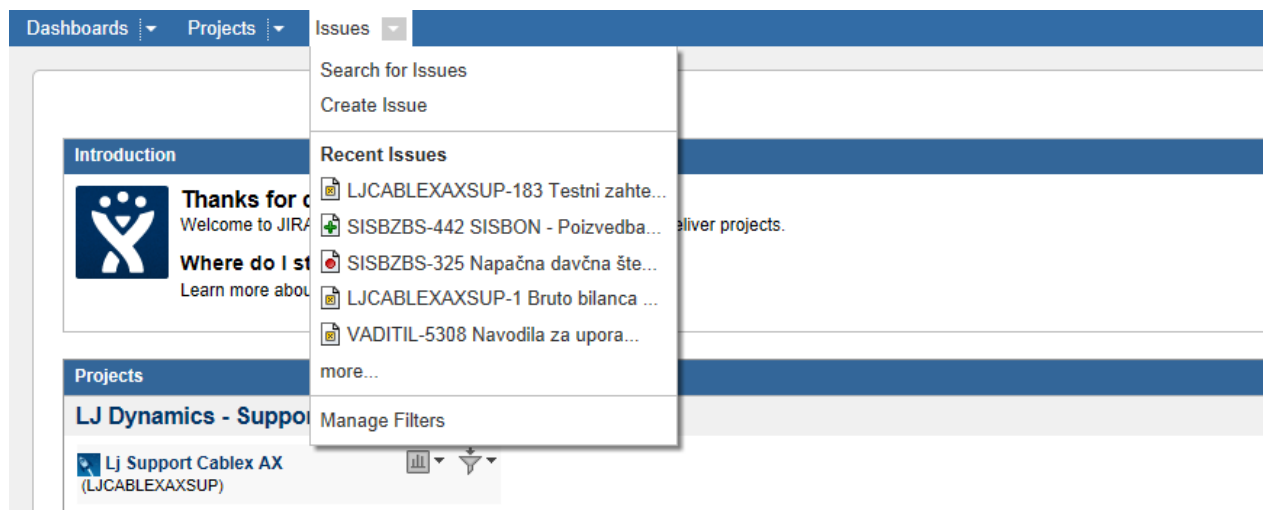


Figure 5 – commands for issue management

4.2.1 Create New Issue

To create new issue:

1. In the main menu click **Issues** and then **Create Issue**.
2. Jira opens the screen for creation of a new issue.
3. In upper right corner you can find **Configure Fields**, where you can adjust visuals or you can mark the fields that you want to hide.

4. All fields marked with * are mandatory.
5. From **Project** select the project for which you want to create the issue.
6. From **Issue Type** select issue type. Issue type can be customized for a particular project. The standard issue types are:
 - Bug,
 - New feature,
 - Task,
 - Improvement,
 - Question.
7. In **Summary** enter issue summary.
8. From **Priority** select issue priority. The highest priority is **Blocker**, the lowest is **Trivial**.
9. From **Component/s** select project component.
10. In **Affects Version/s** and **Fix Version/s** enter affected version number or fix number or leave it blank.
11. In **Environment** enter data on environment that is related to the issue (e.g. computer name, operating system, database name etc.).
12. In **Description** enter a detailed description of the issue.
13. All other fields are filled by Adacta.
14. Click **Create**.
15. When created, issue gets a unique key made of the project key (e.g. SISBZBS) and serial number of the issue within the project (e.g. 13).
16. When the issue is created, it can be edited and commented. You can also add an attachment or screen dump to it.

Create Issue ⚙️ Configure Fields ▾

Project*

Issue Type* ?

Summary*

Security Level ?

Priority ?

Component/s*
Start typing to get a list of possible matches or press down to select.

Affects Version/s

Fix Version/s

Environment
For example operating system, software platform and/or hardware specifications (include as appropriate for the issue).

Description

Original Estimate (eg. 3w 4d 12h) ?
An estimate of how much work remains until this issue will be resolved.
The format of this is ' *w *d *h *m ' (representing weeks, days, hours and minutes - where * can be any number)
Examples: 4d, 5h 30m, 60m and 3w.

Reference
Referenčna številka

Maksimalno zaračunljivih ur

Odgovorna oseba ?
Oseba, ki odgovarja za zahtevek ves čas njegovega trajanja.

Labels
Begin typing to find and create labels or press down to select a suggested label.

Create another

Figure 6 – Create Issue

4.2.2 Issue Overview

Issue overview shows all issue details as well as its attachments and comments.

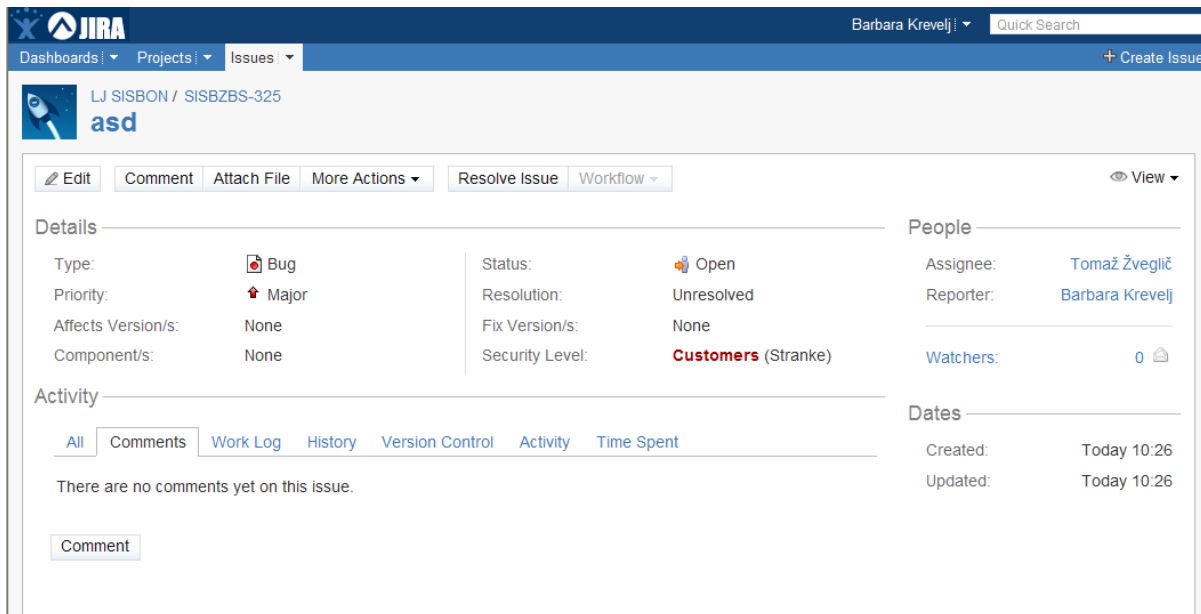


Figure 7 – Issue Overview

4.2.3 Edit Issue

To edit an existing issue:

1. Open the issue and click **Edit**.
2. Edit the issue as describe above under Create Issue and click **Update**.

4.2.4 Comment Issue

Adding comments to issues is a much better way than communicating about them via e-mail. In this way, comments are saved as an integral part of issue database so that their history can be reviewed simply and efficiently.

To comment an existing issue:

1. Open the issue and click **Comment**.
2. Enter the comment and click **Add**.

4.2.5 Attach File

To attach a file to an existing issue:

1. Open the issue and click **Attach Files**.

2. Click **Browse** and find the file.
3. In **Comment** enter (optionally) the comment.
4. Click **Attach**.

4.2.6 Attach Screenshot

To attach a screenshot to an existing issue:

1. Open the issue and click **Attach Screenshot**.
2. After capturing the screen using **PrintScreen** key, click Paste to insert it in Jira.
3. In **Comment** enter (optionally) the comment.
4. Click **Attach**.

4.3 Issue Lifecycle, Workflow and User Roles

Each issue has a lifecycle and workflow – they define lifecycle states and possible transition among them from its creation to the final closure of the issue. In accordance with a given user role on the project, Jira user can trigger the transition of the issue from the current state in the next or the previous one by clicking available transmission commands. The lifecycle and role can be customized differently for different projects or issue types (e.g. workflow for a bug can be set different as a workflow for a new functionality).

The simplest Adacta's standard lifecycle has the following states:

- **Open;**
- **In Progress;**
- **Resolved;**
- **Closed ;**
- **Re-opened.**

Standard user roles are:

- **Reporter** – the user who created the issue or the user in whose name the issue was created by someone else.
- **Assignee** – the user who is assigned to solve the issue. That is always a default assignee for each project (e.g. Adacta project manager).
- **Users** – the entire group of persons that can create issues on a given project.
- **Developers** – the entire group of persons who can solve issues (possible assignees).
- **Watcher** – the user who gets notifications on all issues for a given project although he/she is not their reporter or assignee.

For your own changes on issues (create issue or comment on issue) Jira does not send you an e-mail notification, about changes made on issue, automatically. Others, who are involved on issue (assignee, watcher), will get an e-mail about your changes on issue. In case that, as reporter on issue, you want to receive an e-mail notification about changes made on issue, you need to click on your Profile in upper right corner.

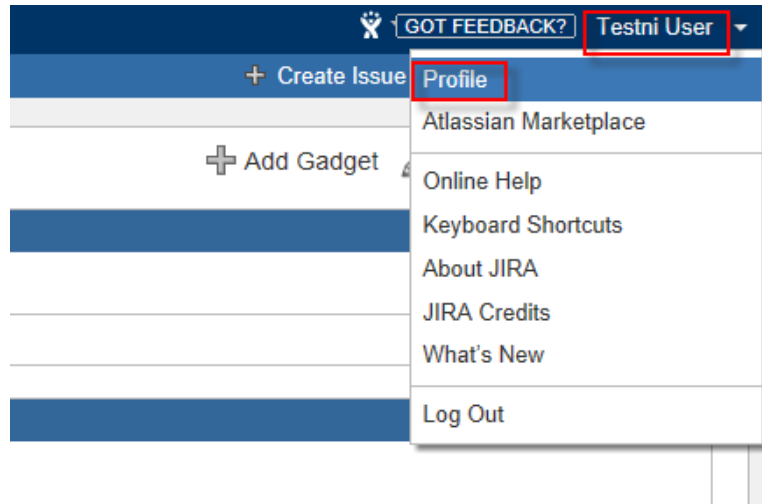


Figure 8 – Profile changes

In the right corner, under **Preferences**, click **Edit**.

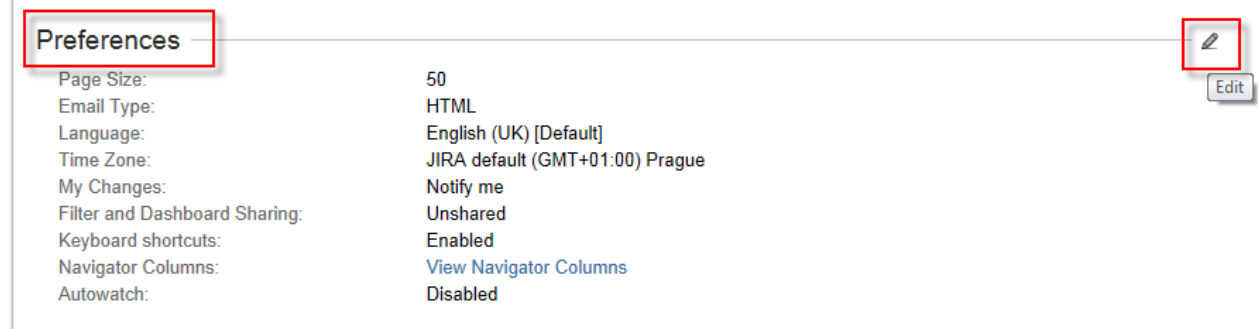


Figure 9 – Preferences

In the field of **My changes** click **Notify me** and that **Update**.

Update User Preferences

Page Size *
Number of Issues displayed per Issue Navigator page

Email Type
Outgoing email format

Language
Additional language packs are available from Atlassian Translations. Contact your administrator about installing additional language packs.

Time Zone

The time zone used when showing date time information.

My Changes
Whether to email notifications of any changes you make.

Sharing
Whether to share Filters & Dashboards by default.

Keyboard shortcuts
Whether all keyboard shortcuts will work.

Autowatch
Issues that you create or comment on will automatically be watched for future changes.

Figure 10 – Update User Preferences

A typical issue workflow is as follows:

- When the reporter creates a new issue, the issue is moved to **Opened** state. Jira sends an e-mail to the assignee that the issue has been created. Via e-mail, Jira also notifies the reporter and watcher about creation of the issue and about each its further update.
- The assignee can either start working him/herself or he/she can assign the issue to some other developer. If the assignee wants, he/she can move the issue to **In Progress** state when he/she starts working on it but this is only an option. Jira notifies the active assignee via e-mail about every update related to the issue (e.g. comment, attachment, change).
- When the assignee thinks that issue is resolved in one or another way, he/she moves it in **Resolved** state and comments how/what has been done.
- The reporter checks the solution of the issue (e.g. bug fix, answer, new feature that has been delivered). If the reporter is satisfied with the provided solution, he/she sets the issue as **Closed**. If the reported is not satisfied, he/she sets the issue in **Reopened** state. In this case the reporter comments why he/she thinks that the provided solution has not been satisfactory.

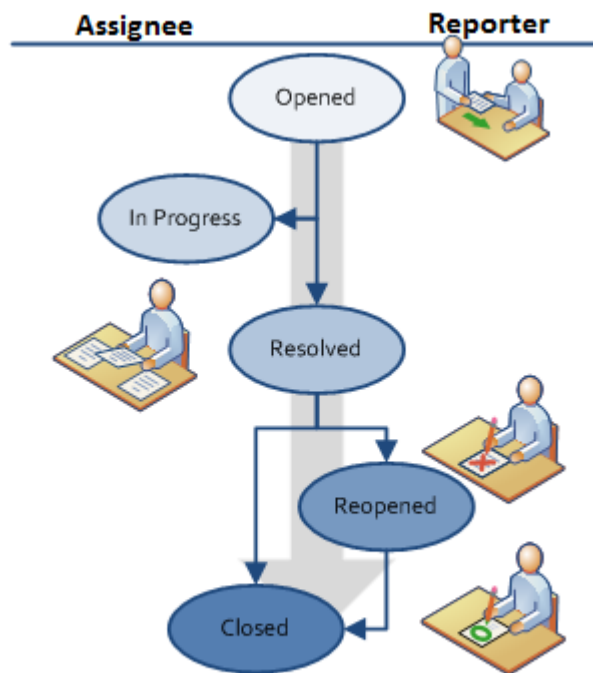


Figure 11 – Issue Lifecycle States and Workflow

4.4 Search Issue

Jira enables two ways for searching issues – quick search and advance search.

4.4.1 Quick Search

If you know the issue key or key words from its summary or description, use Quick Search:

1. In **Quick Search** (in the upper right corner of the screen with issue overview) enter the issue key (e.g. 13) or some text from issue summary or description.

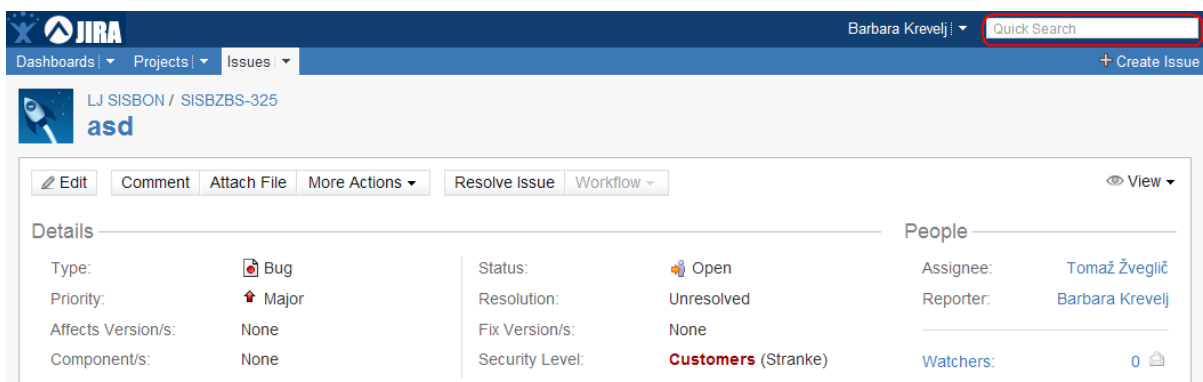


Figure 12 – Quick Search

- If only one issue is found as a result of the entered search criterion, Jira displays the issue details. If there are more hits, Jira shows the list of issues.

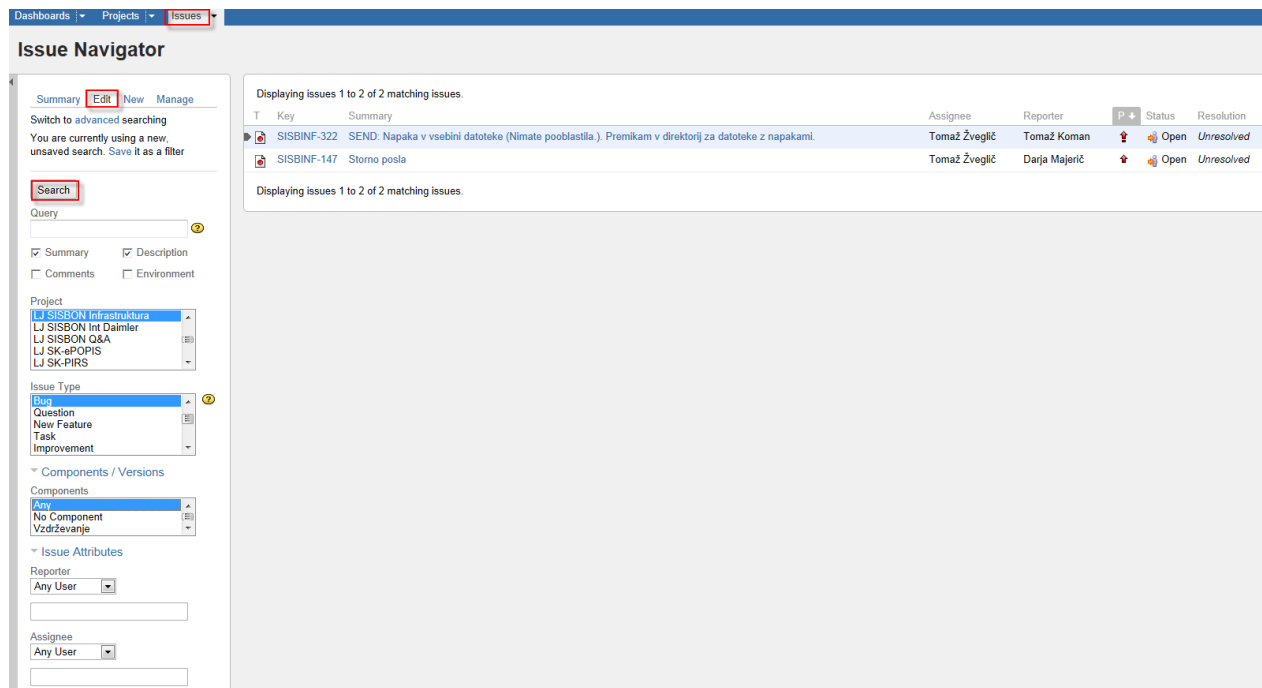


Figure 13 – List of Issues as Result of a Search

- Display of issues after the status you can find also on the tab **Projects**. On the left tab **Issues** you see the following picture. On the right side is located the **Status Summary**, which tells you the number of issues in each status (e.g. how many issues it is in the status open, resolved, closed). By clicking on one of the statuses (e.g. open-open issues) the program will display the list of all opened issues.

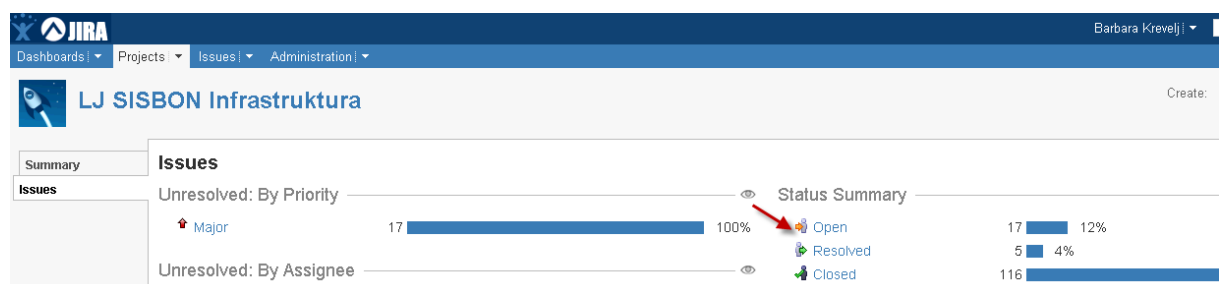


Figure 14- Status of Issues

4.4.2 Advanced Search

To use advanced search:

- In the main menu click **Issues** and then **Search for Issues**. Jira opens the screen, like in the »Figure 13 - List of Issues as Result of a Search« where you can set a search filter.
- Set required search criteria and click **Search**.
- On the right side of the screen, Jira displays the search results.

4.4.3 Save Filter

The true power of Jira search is to create and save search filters for further use. Search criteria can be saved as a filter by clicking **Save** (see Figure 13- List of Issues as Result of a Search). The advanced search can also be accessed from Dashboard via **Favorite Filters** in the upper right corner of the screen.

5 Jira Support

In case of doubt, additional questions or problems with a user name and password, you may contact the Adacta Project Office: projektna.pisarna@adacta.si.