CUL JIRA Workshop

JIRA is a issue tracking and project management tool that is accessible from your web browser.

The complete JIRA documentation from Atlassian is available here.
To obtain a JIRA account, add a new project, add a group, change membership of a group, adjust permissions, adjust notifications, etc. please contact cul-jira-l@cornell.edu.

Login to JIRA

JIRA consists of **Projects** that contain **Issues**

What is an Issue?
What is a Project?

Customizing the Dashboard

Have issues that are assigned to you show up on your JIRA Dashboard (aka home page).
Have easy access to your project(s), favorite filters, etc. as well.

Managing your User Profile

Change your Password, Profile, and Preferences.

Creating and working with Issues

Creating an Issue
Create several issues within the "Move to New Library" JIRA project.
Assign one to yourself and one to someone else in the group.
Check your email to see the notification.
Review a list of issues you reported by clicking on **Projects** and then selecting **Reported by me** from the **Filters** drop-down menu.

Editing an Issue
Edit one or more issues that you created.
Reassign one of your issues to a classmate.
Resolve or Close one of your issues.

Commenting on an Issue
Add comments to the issues you created above.

Emailing an Issue
Email one of your issues to a classmate to whom the issue is not.

Watching an Issue
Add one of your classmates as a watcher to one of your issues.

Attaching a File
Attach a file to one of the issues you created above.

Linking Issues
Link one or more issues together.

Creating a Sub-Task
Create several sub-tasks for the tasks you created above.
See how the sub-tasks appear when viewing the task.

Although not covered in the workshop, you may also...
Attach a screenshot to an issue
Clone an issue
Label an issue
Log work on an issue
Modify multiple issues at one time
Move an issue to another project
Schedule an issue
Set security on an issue

Searching for Issues

Using Quick Search
Search for one of your issues by number (TRAIN-#).
Search for issues assigned to you (my).

Searching for Issues
Search for the issues you created (which makes you the Reporter) using a Simple Search.
We will not cover Advanced Search in this workshop.

Saving Searches (aka Using Filters)
Save your search.
Share your search with the training-users group.
Try the shared searches created by your classmates.

Using the Issue Navigator
Customizing your Issue Navigator
Move fields around within the Issue Navigator.
Add a new field to Issue Navigator.
Note that the results can be printed or exported to Word, Excel, PDF, XML, etc.

Browsing a Project

Take a look at the Project Summary for the "Move to New Library" JIRA Project.
Use Reports option to create Pie Charts, Gantt Charts, you name it!
Can also create "canned" reports via the Filters option. The results can be printed or exported to Word, Excel, PDF, XML, etc.

Using Components and Versions

What is a Component? Version?
Watch instructor add Components.
Edit your issues to add a Component.
Search for issues assigned a specific component.

Customization

JIRA uses "schemes" to customize projects...

- Permission Scheme is used to identify which users are allowed to do what with the project.
- Notification Scheme is used to determine who should receive an e-mail when a change is made to an issue within the project.
- Issue Type Scheme is used if you want your project to have different issue types than the default.
- Field Configuration Scheme is used if you want to have additional customized fields for entry or what to take away fields that aren't being used by your project.
- Workflow Scheme is used if you want to have a non-standard workflow.

JIRA Best Practices

- Don't send out e-mails about issues/tasks that are in JIRA. Simply keep all information in JIRA and let JIRA send e-mails when issues/tasks are added/updated.
- Attach documents to issues/tasks as appropriate, so all information is available in the future.
- Customize the issue/task entry page to meet your needs, including the addition of new custom fields.
- Customize the Notification Scheme so that folks do not receive unnecessary e-mails.
- Share reports (aka Filters) within the project.
- Make use of Versions so that all issues/tasks for a release/due date are reported together.
- Use Components to assign issues/tasks to the appropriate category. Each category can be assigned to the person in charge of that work.
- When using sub-tasks, give the parent task an estimate of 1 minute so that you able to quickly identify the parent tasks.

H-E-L-P!

Email cul-jira-l@cornell.edu if you need help.