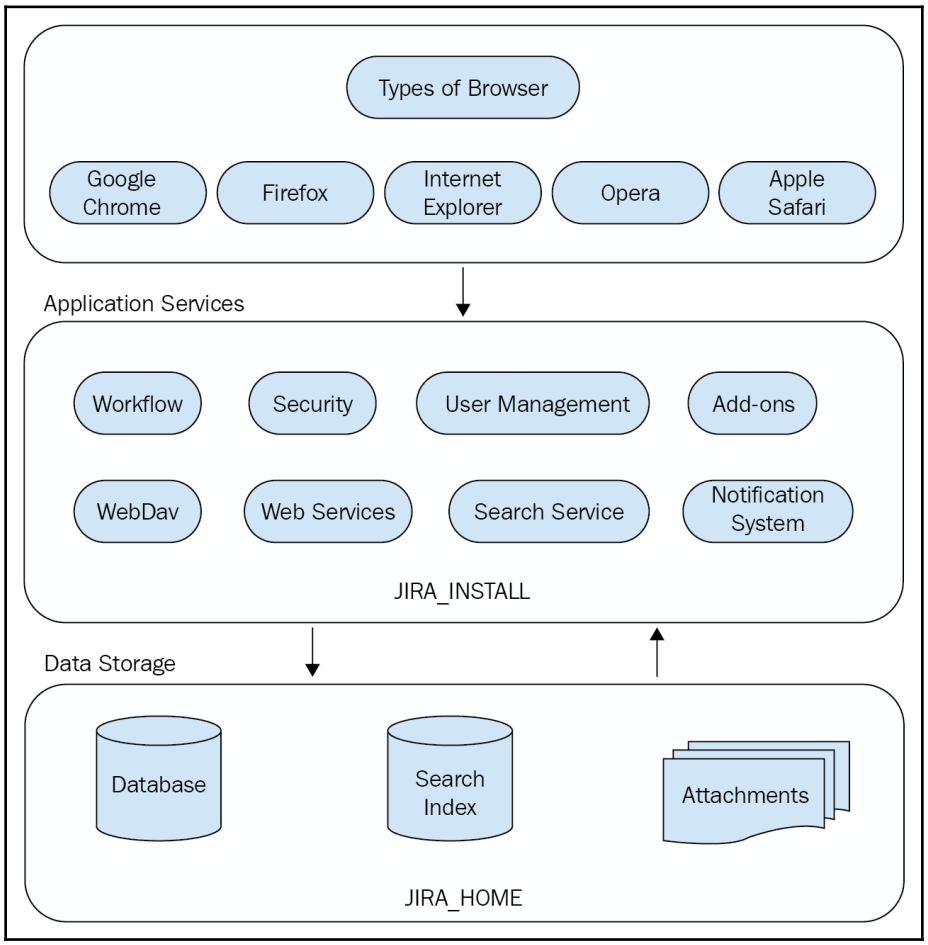
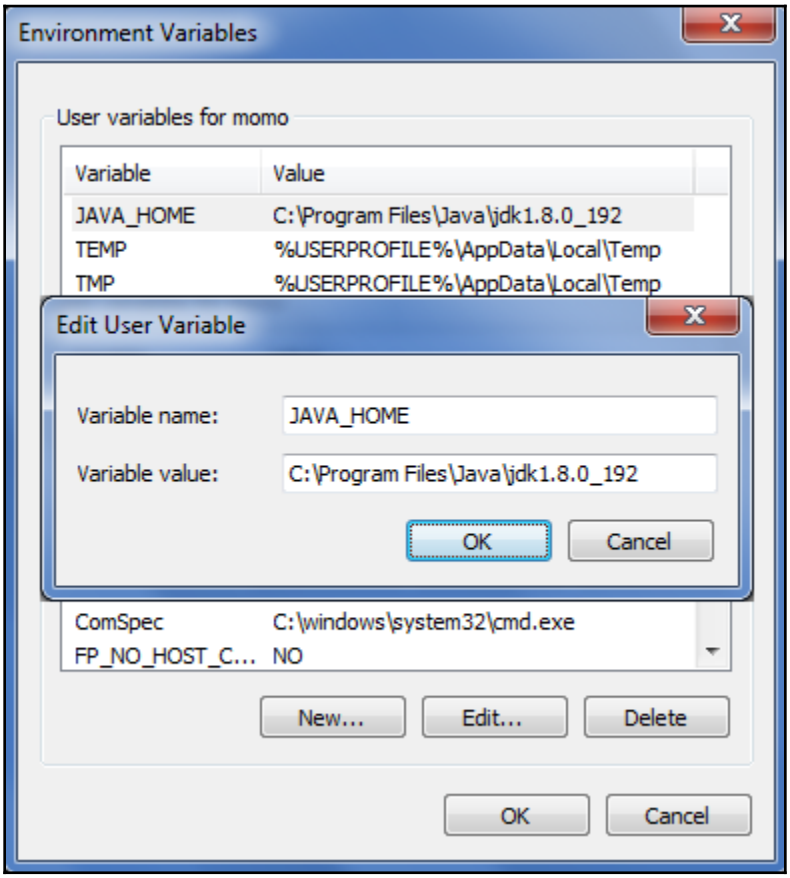
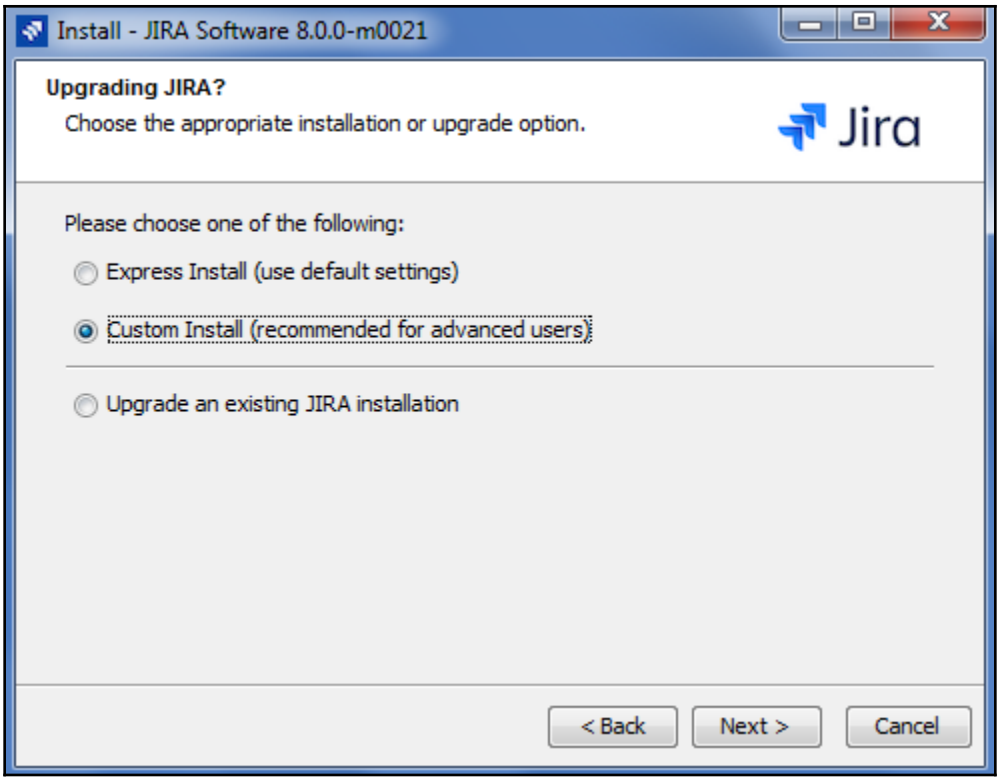
Chapter 1: Getting Started with Jira

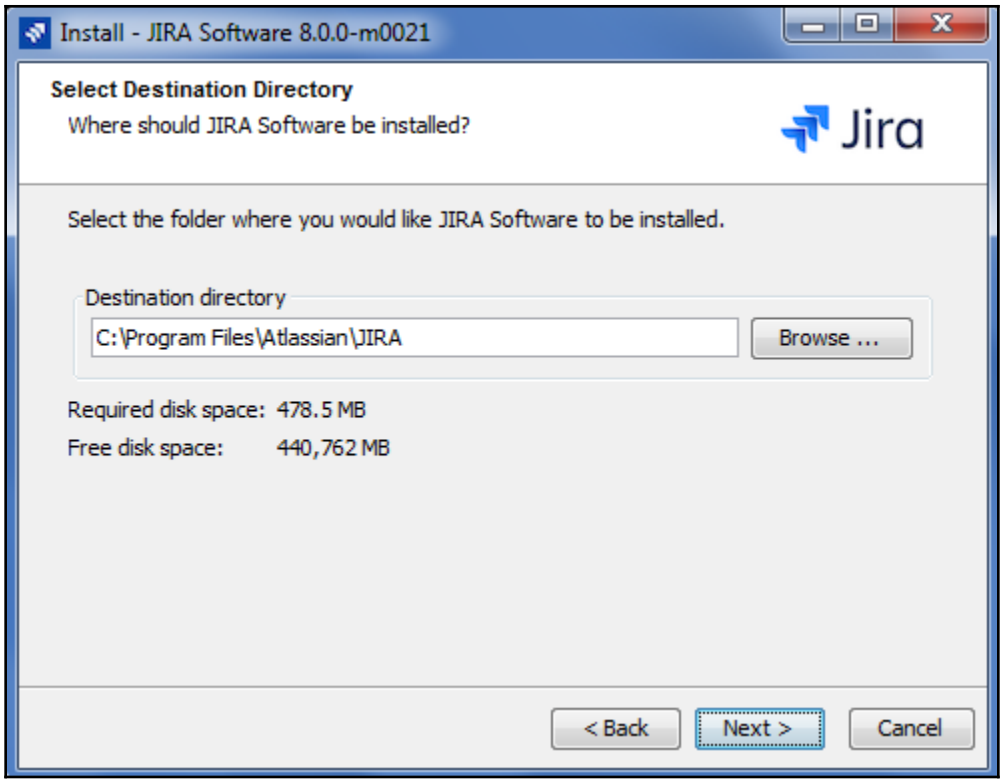


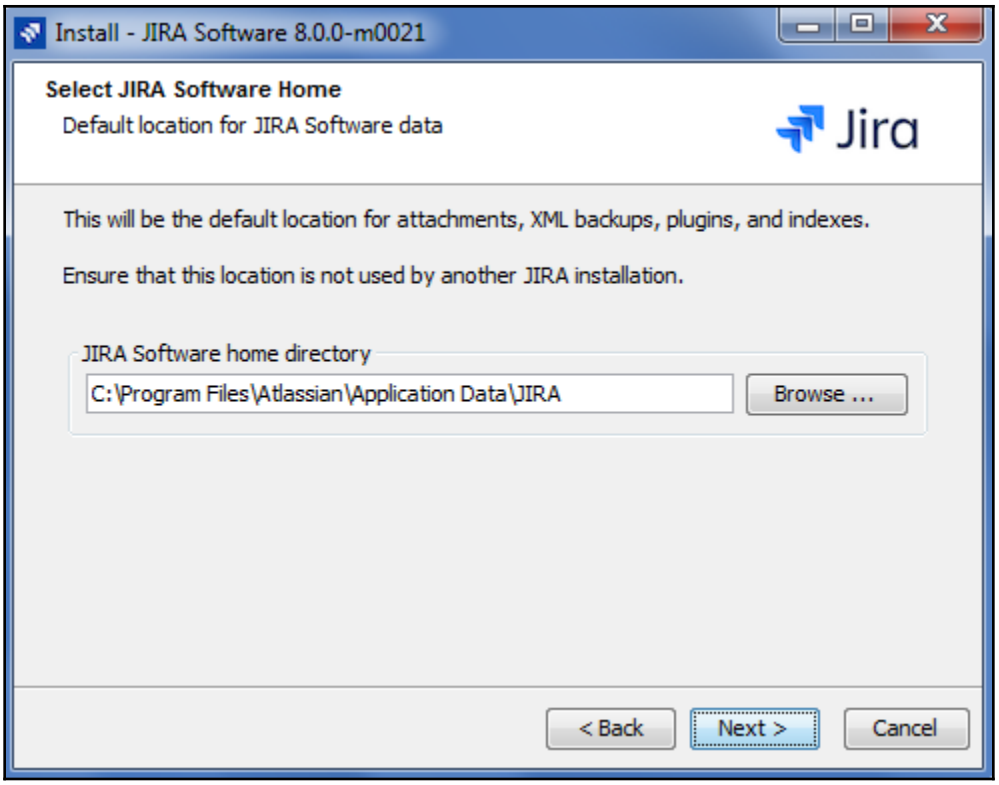
C:\windows\system32\cmd.exe
C:\>java -version
java version "1.8.0_192"
Java(TM) SE Runtime Environment (build 1.8.0_192-b12)
Java HotSpot(TM) 64-Bit Server VM (build 25.192-b12, mixed mode)
C:\>

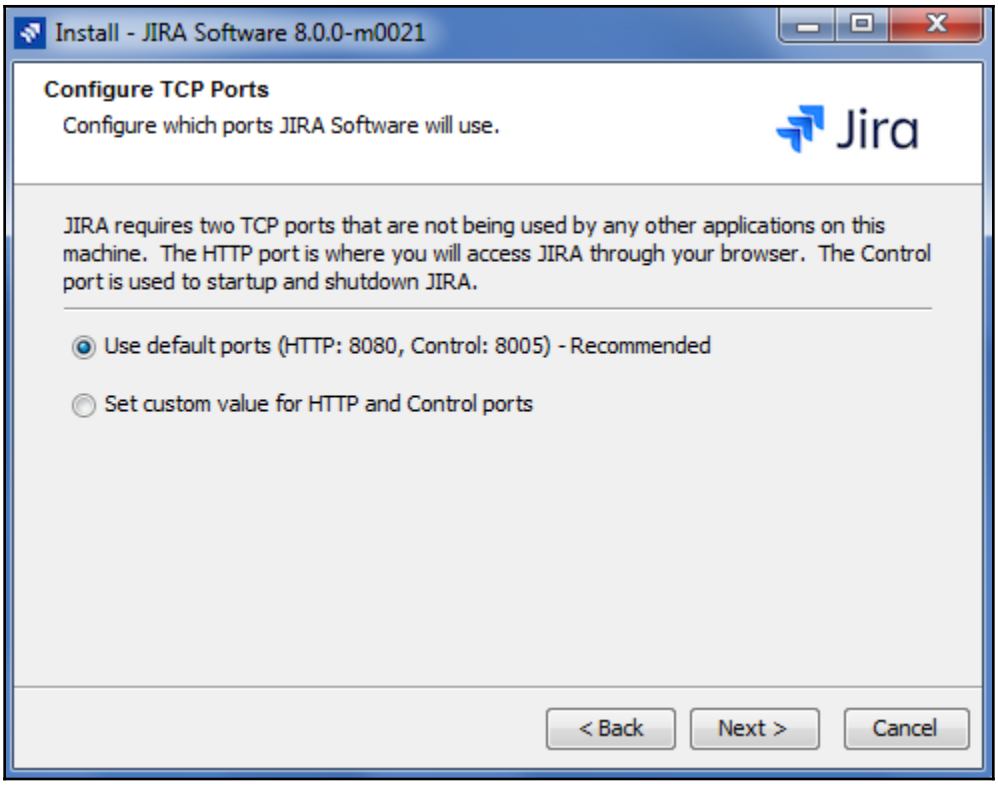

Environment Variables
User variables for momo
Variable
Value
JAVA_HOME
C:\Program Files\Java\jdk1.8.0_192
TEMP
%USERPROFILE%\AppData\Local\Temp
TMP
%USERPROFILE%\AppData\Local\Temp
Edit User Variable
Variable name:
JAVA_HOME
Variable value:
C:\Program Files\Java\jdk1.8.0_192
OK
Cancel
ComSpec
C:\windows\system32\cmd.exe
FP_NO_HOST_C...
NO
New...
Edit...
Delete
OK
Cancel

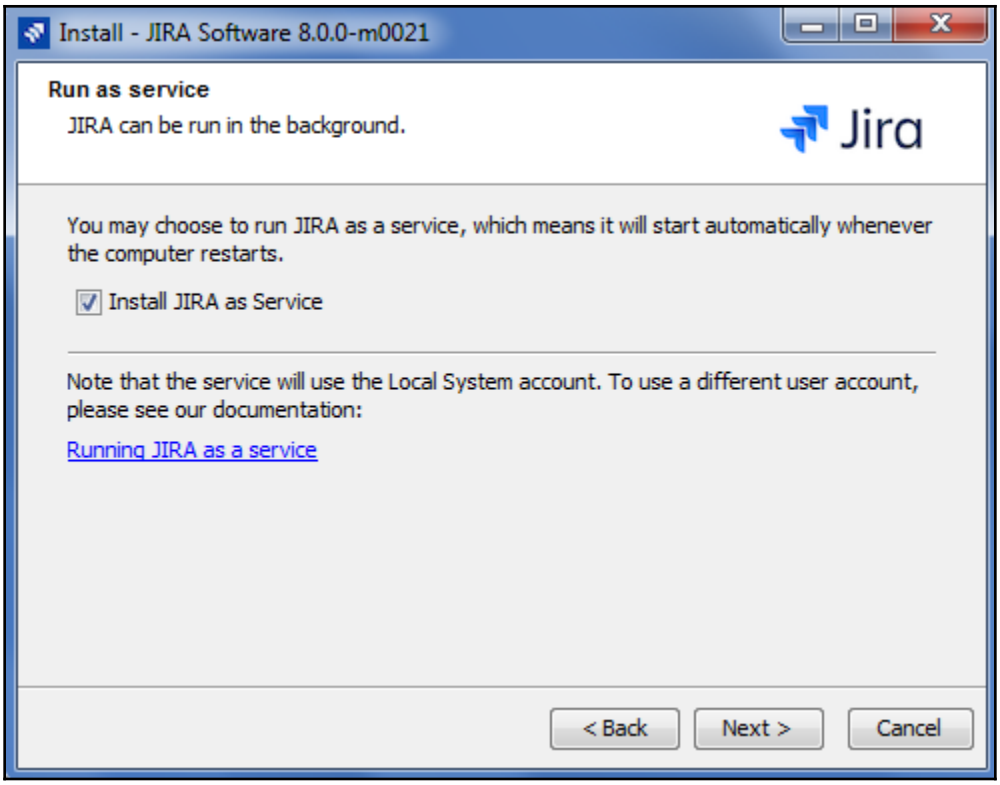
Install - JIRA Software 8.0.0-m0021
Jira Software
Welcome to the JIRA Software installation wizard
This will install JIRA Software 8.0.0-m0021 on your computer. The wizard will lead you step by step through the installation.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

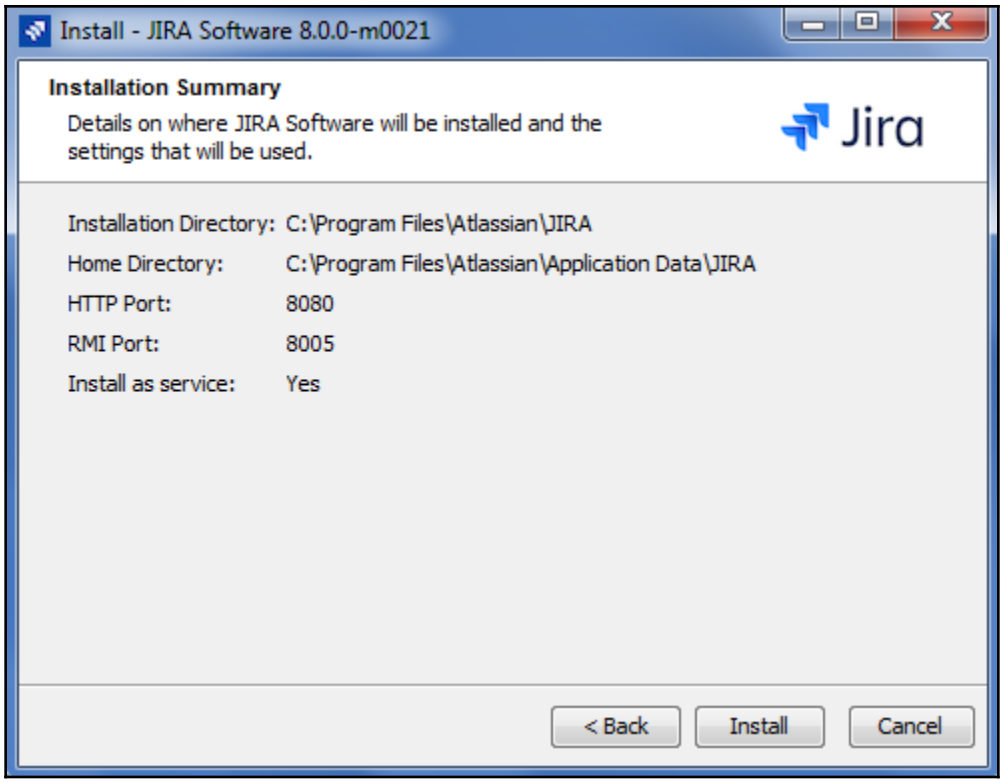

Install - JIRA Software 8.0.0-m0021
Upgrading JIRA?
Choose the appropriate installation or upgrade option.
Jira
Please choose one of the following:
Express Install (use default settings)
Custom Install (recommended for advanced users)
Upgrade an existing JIRA installation
< Back
Next >
Cancel

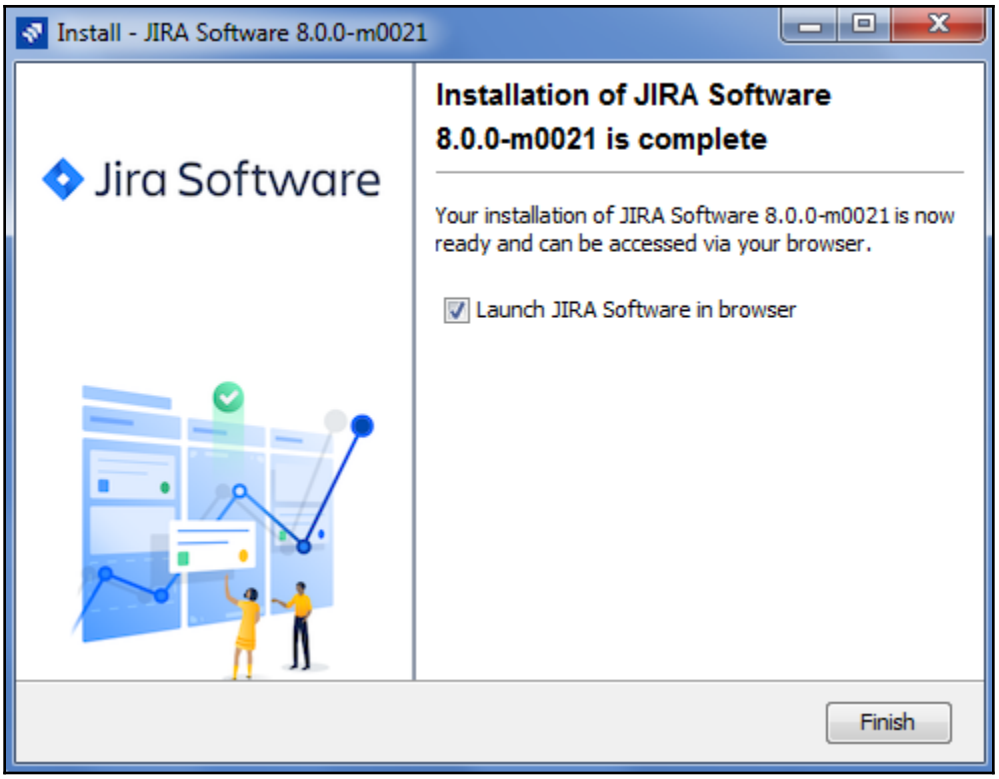

Install - JIRA Software 8.0.0-m0021
Select Destination Directory
Where should JIRA Software be installed?
Jira
Select the folder where you would like JIRA Software to be installed.
Destination directory
C:\Program Files\Atlassian\JIRA
Browse ...
Required disk space: 478.5 MB
Free disk space: 440,762 MB
< Back
Next >
Cancel

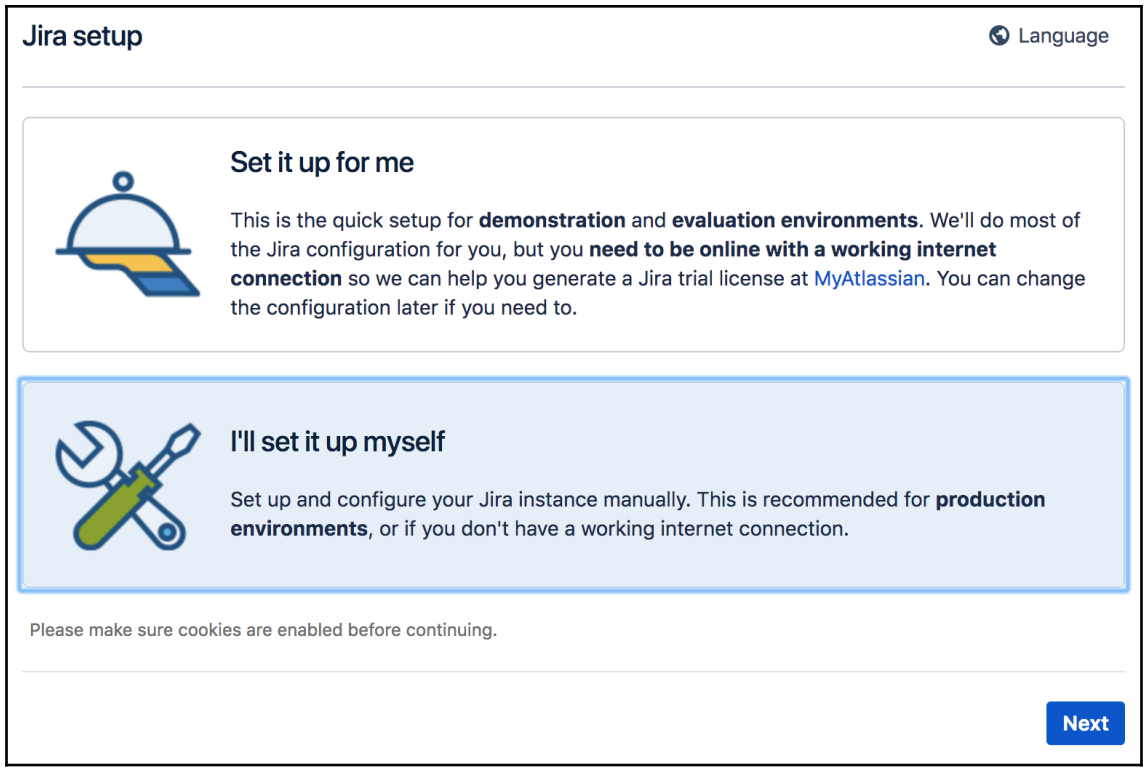

Install - JIRA Software 8.0.0-m0021
Select JIRA Software Home
Default location for JIRA Software data
Jira
This will be the default location for attachments, XML backups, plugins, and indexes.
Ensure that this location is not used by another JIRA installation.
JIRA Software home directory
C:\Program Files\Atlassian\Application Data\JIRA
Browse ...
< Back
Next >
Cancel

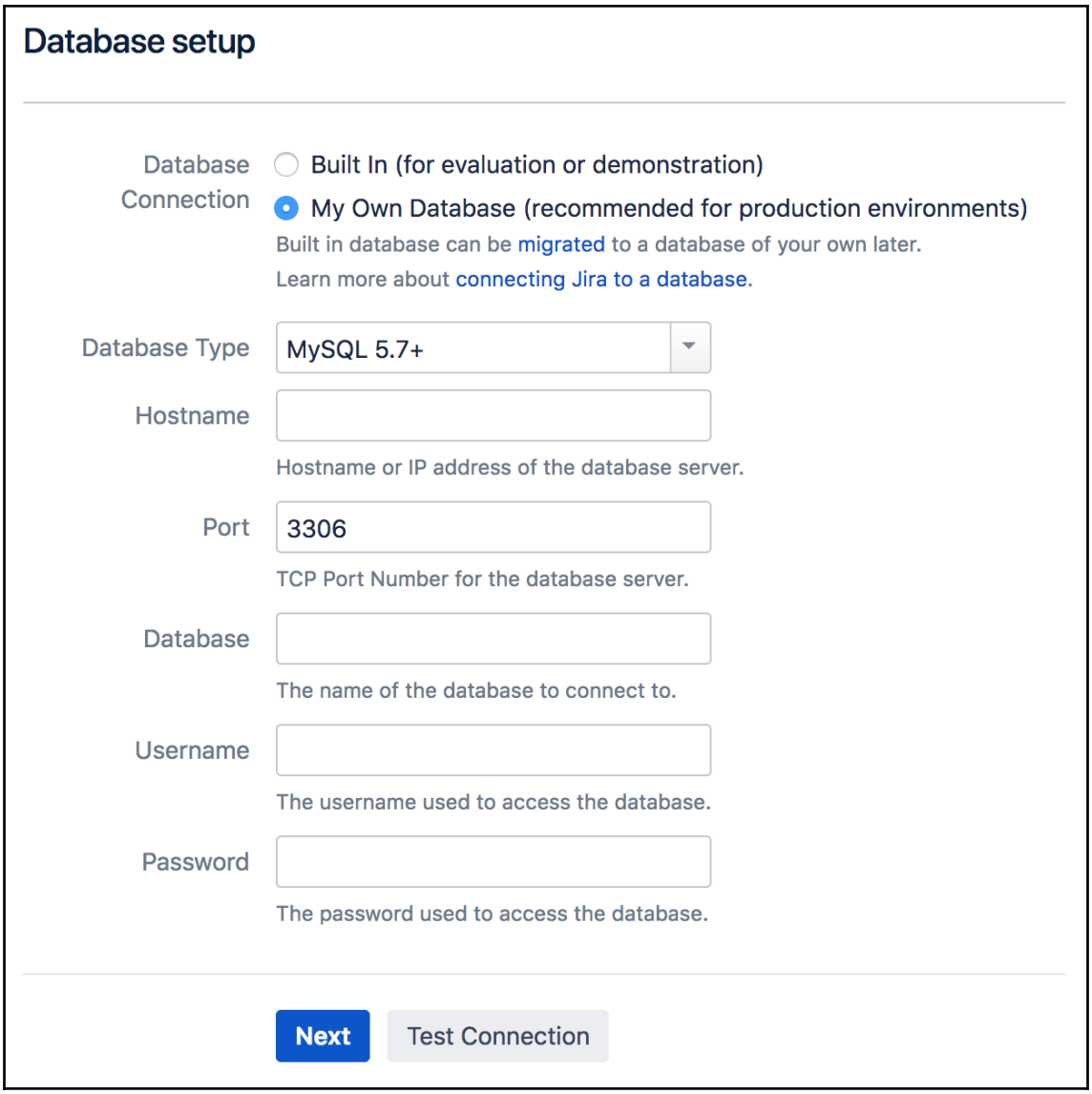

Install - JIRA Software 8.0.0-m0021
Configure TCP Ports
Configure which ports JIRA Software will use.
Jira
JIRA requires two TCP ports that are not being used by any other applications on this machine. The HTTP port is where you will access JIRA through your browser. The Control port is used to startup and shutdown JIRA.
Use default ports (HTTP: 8080, Control: 8005) - Recommended
Set custom value for HTTP and Control ports
< Back
Next >
Cancel

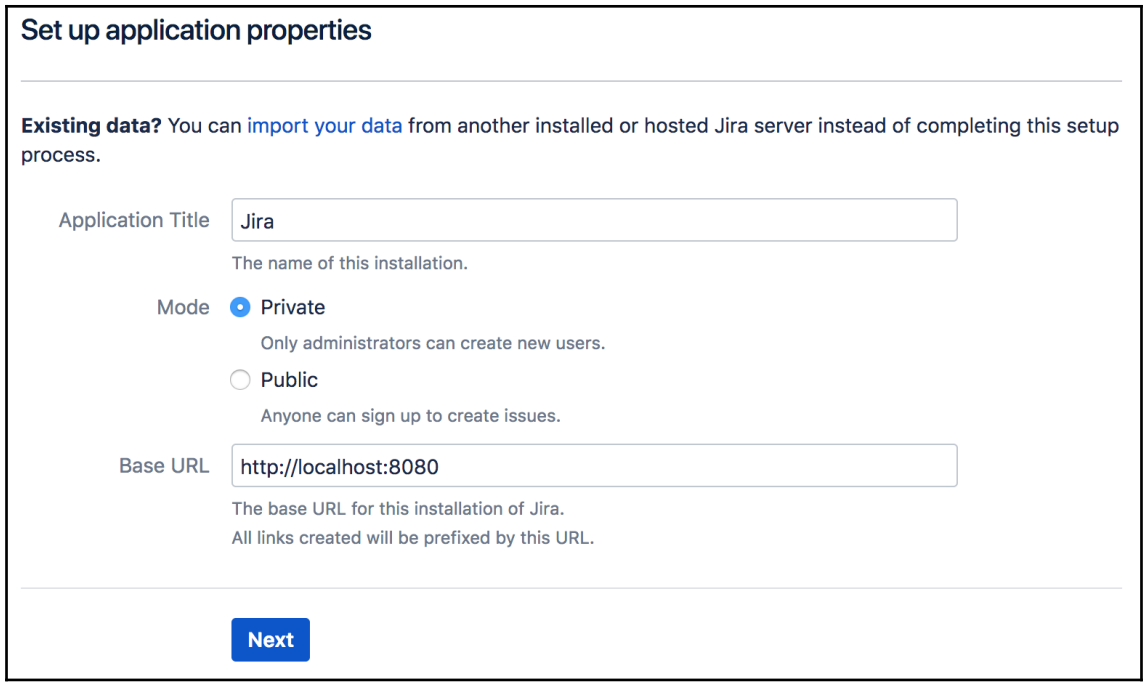

Install - JIRA Software 8.0.0-m0021
Run as service
JIRA can be run in the background.
Jira
You may choose to run JIRA as a service, which means it will start automatically whenever the computer restarts.
Install JIRA as Service
Note that the service will use the Local System account. To use a different user account, please see our documentation:
Running JIRA as a service
< Back
Next >
Cancel

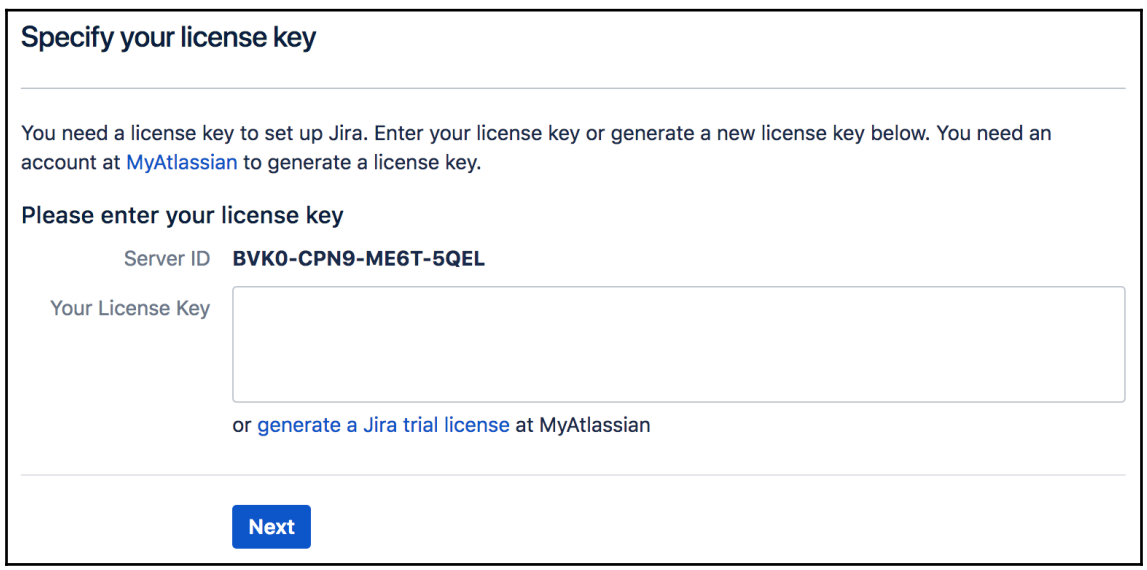

Install - JIRA Software 8.0.0-m0021
Installation Summary
Details on where JIRA Software will be installed and the settings that will be used.
Jira
Installation Directory: C:\Program Files\Atlassian\JIRA
Home Directory: C:\Program Files\Atlassian\Application Data\JIRA
HTTP Port: 8080
RMI Port: 8005
Install as service: Yes
< Back
Install
Cancel

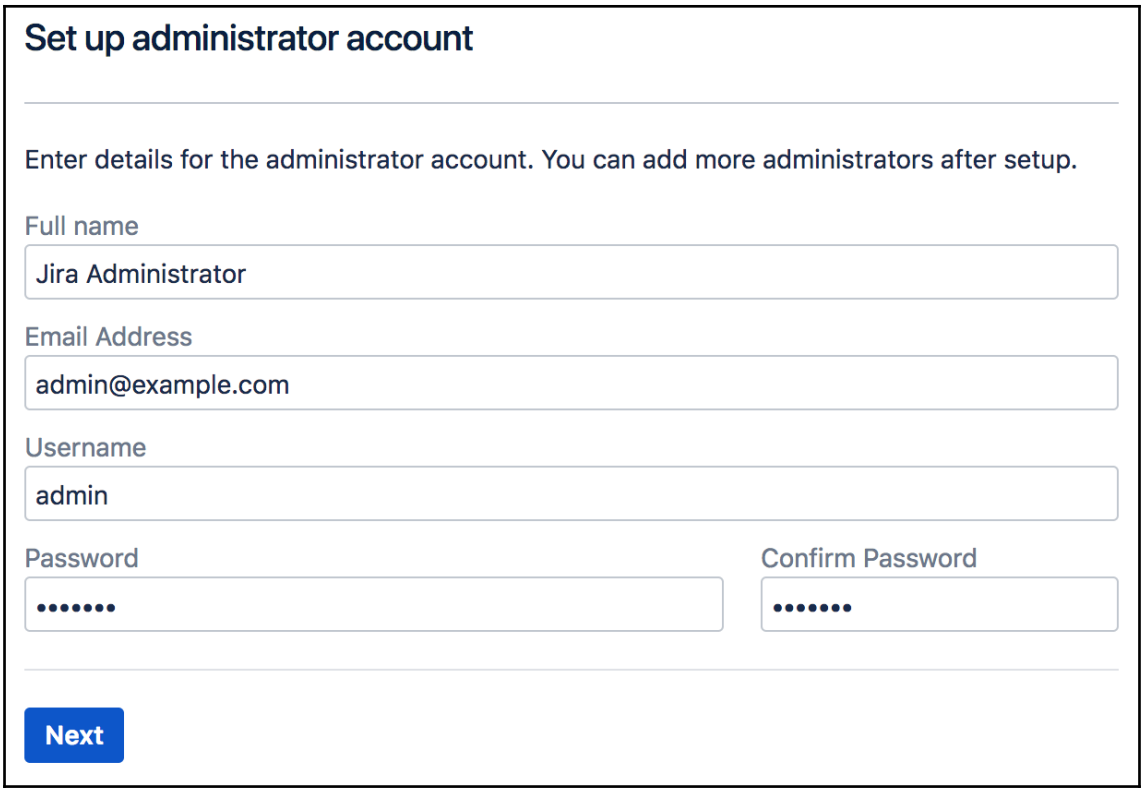

Install - JIRA Software 8.0.0-m0021
Jira Software
Installation of JIRA Software 8.0.0-m0021 is complete
Your installation of JIRA Software 8.0.0-m0021 is now ready and can be accessed via your browser.
Launch JIRA Software in browser
Finish


Jira setup
Language
Set it up for me
This is the quick setup for demonstration and evaluation environments. We'll do most of the Jira configuration for you, but you need to be online with a working internet connection so we can help you generate a Jira trial license at MyAtlassian. You can change the configuration later if you need to.
I'll set it up myself
Set up and configure your Jira instance manually. This is recommended for production environments, or if you don't have a working internet connection.
Please make sure cookies are enabled before continuing.
Next

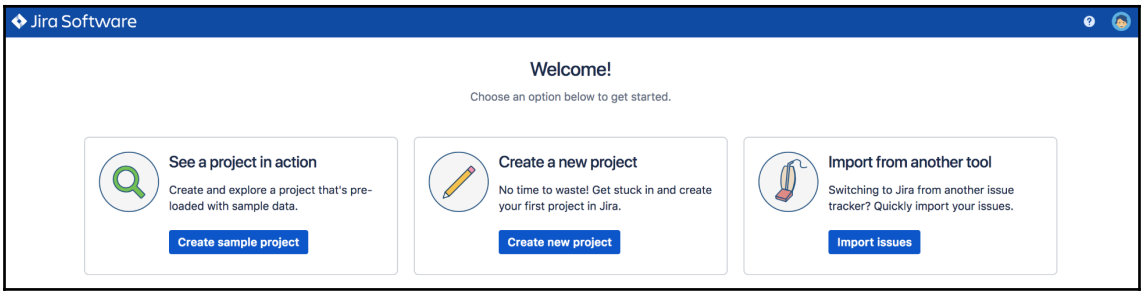

Database setup
Database Connection
Built In (for evaluation or demonstration)
My Own Database (recommended for production environments)
Built in database can be migrated to a database of your own later.
Learn more about connecting Jira to a database.
Database Type
MySQL 5.7+
Hostname
Hostname or IP address of the database server.
Port
3306
TCP Port Number for the database server.
Database
The name of the database to connect to.
Username
The username used to access the database.
Password
The password used to access the database.
Next
Test Connection

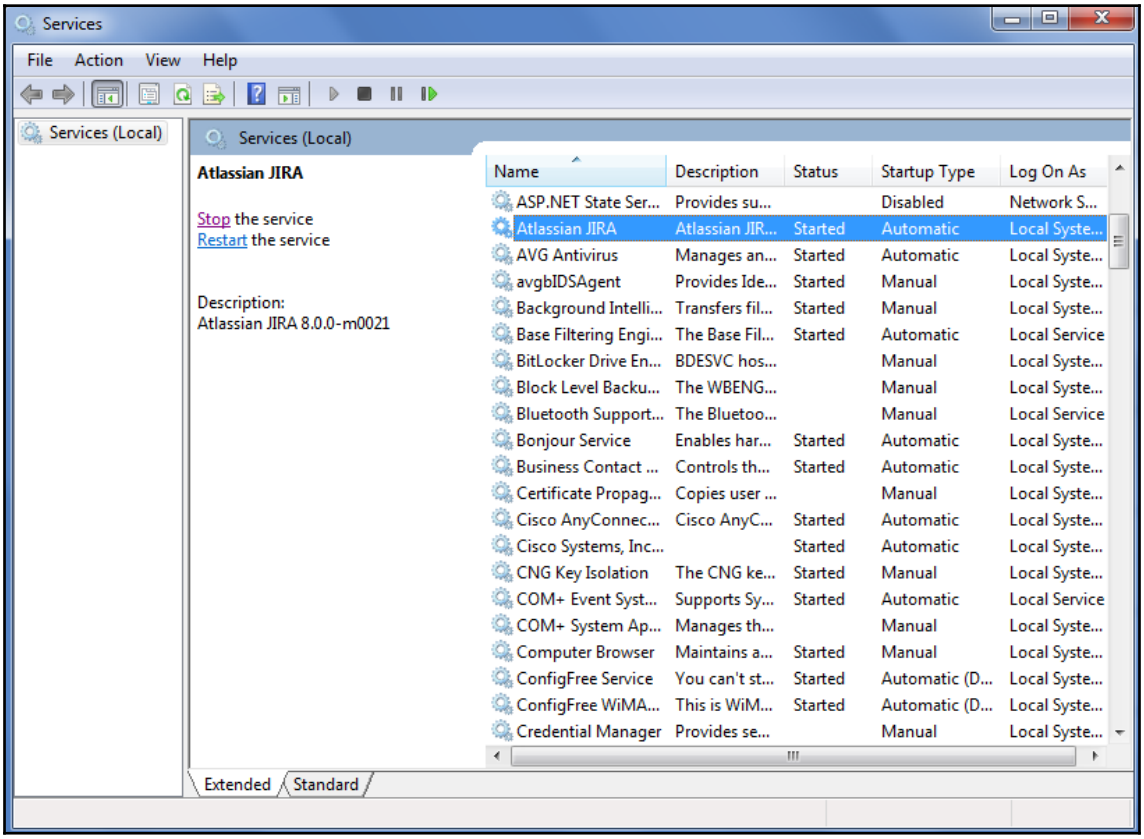

Set up application properties
Existing data? You can import your data from another installed or hosted Jira server instead of completing this setup process.
Application Title
Jira
The name of this installation.
Mode
Private
Only administrators can create new users.
Public
Anyone can sign up to create issues.
Base URL
http://localhost:8080
The base URL for this installation of Jira.
All links created will be prefixed by this URL.
Next

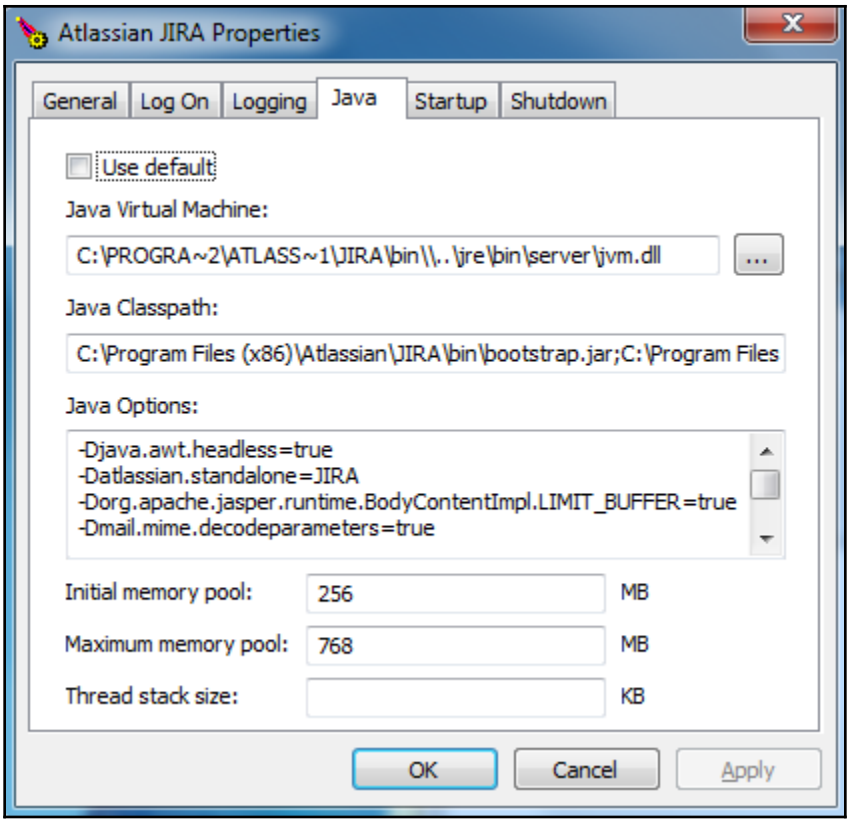

Specify your license key
You need a license key to set up Jira. Enter your license key or generate a new license key below. You need an account at MyAtlassian to generate a license key.
Please enter your license key
Server ID
BVK0-CPN9-ME6T-5QEL
Your License Key
or generate a Jira trial license at MyAtlassian
Next


Set up administrator account
Enter details for the administrator account. You can add more administrators after setup.
Full name
Jira Administrator
Email Address
admin@example.com
Username
admin
Password
Confirm Password
Next

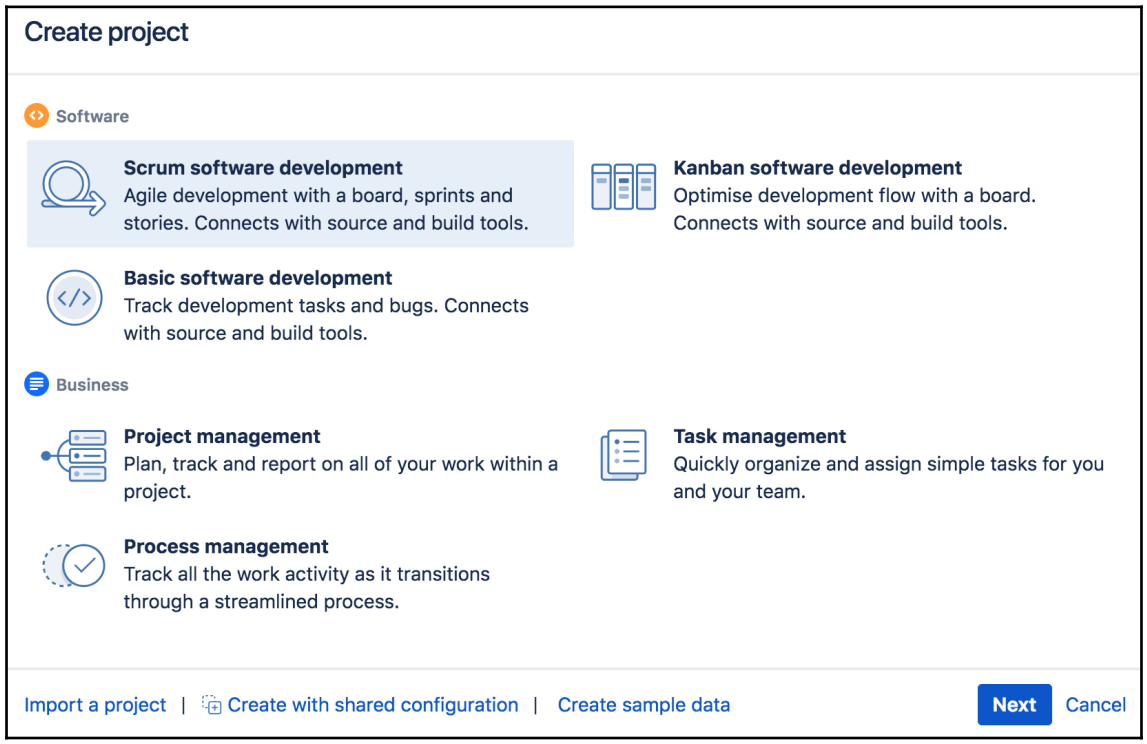
Set up email notifications
Configure a connection to an outgoing mail server so that JIRA can send email notifications. You can configure a mail server now or after you have set up JIRA.
Configure Email Notifications
Later
Now
Finish

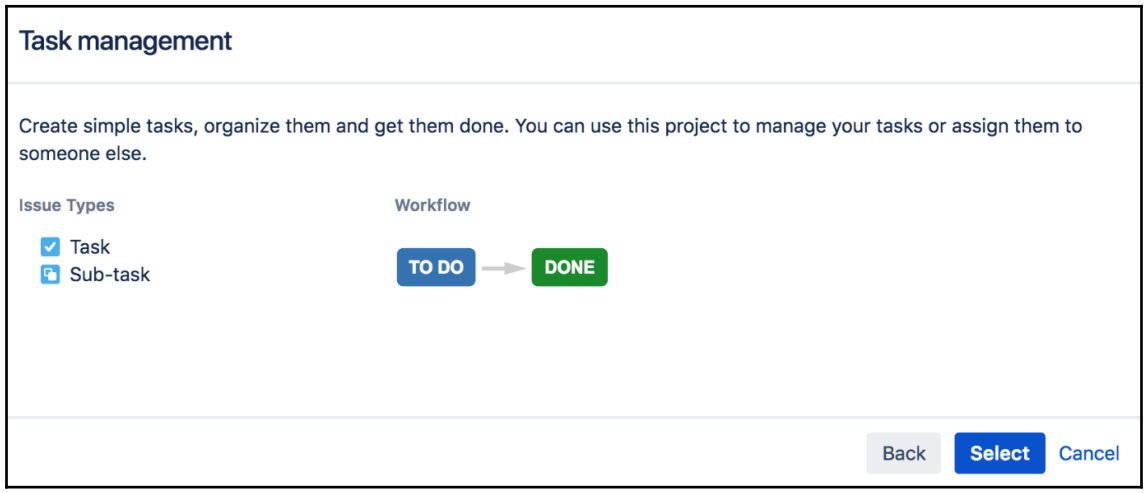

Jira Software
Welcome!
Choose an option below to get started.
See a project in action
Create and explore a project that's pre-loaded with sample data.
Create sample project
Create a new project
No time to waste! Get stuck in and create your first project in Jira.
Create new project
Import from another tool
Switching to Jira from another issue tracker? Quickly import your issues.
Import issues

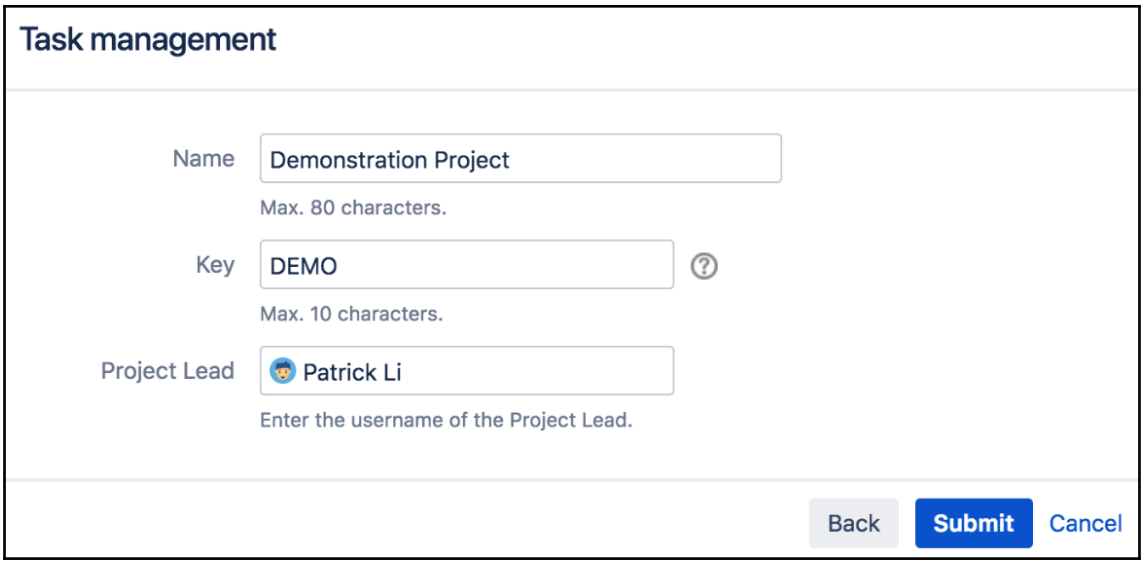

Services
File Action View Help
Services (Local)
Services (Local)
Atlassian JIRA
Stop the service
Restart the service
Description:
Atlassian JIRA 8.0.0-m0021
Name Description Status Startup Type Log On As
ASP.NET State Ser... Provides su... Disabled Network S...
Atlassian JIRA Atlassian JIR... Started Automatic Local Syste...
AVG Antivirus Manages an... Started Automatic Local Syste...
avgbIDSAgent Provides Ide... Started Manual Local Syste...
Background Intelli... Transfers fil... Started Manual Local Syste...
Base Filtering Engi... The Base Fil... Started Automatic Local Service
BitLocker Drive En... BDESVC hos... Manual Local Syste...
Block Level Backu... The WBENG... Manual Local Syste...
Bluetooth Support... The Bluetoo... Manual Local Service
Bonjour Service Enables har... Started Automatic Local Syste...
Business Contact ... Controls th... Started Automatic Local Syste...
Certificate Propag... Copies user ... Manual Local Syste...
Cisco AnyConnec... Cisco AnyC... Started Automatic Local Syste...
Cisco Systems, Inc... Started Automatic Local Syste...
CNG Key Isolation The CNG ke... Started Manual Local Syste...
COM+ Event Syst... Supports Sy... Started Automatic Local Service
COM+ System Ap... Manages th... Manual Local Syste...
Computer Browser Maintains a... Started Manual Local Syste...
ConfigFree Service You can't st... Started Automatic (D... Local Syste...
ConfigFree WiMA... This is WiM... Started Automatic (D... Local Syste...
Credential Manager Provides se... Manual Local Syste...
Extended Standard

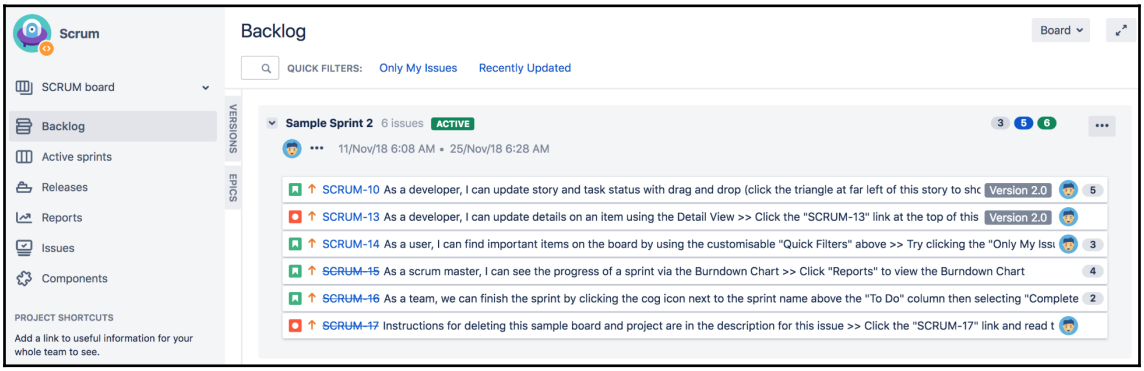

Atlassian JIRA Properties
General
Log On
Logging
Java
Startup
Shutdown
Use default
Java Virtual Machine:
C:\PROGRA~2\ATLASS~1\JIRA\bin\\..\jre\bin\server\jvm.dll
...
Java Classpath:
C:\Program Files (x86)\Atlassian\JIRA\bin\bootstrap.jar;C:\Program Files
Java Options:
-Djava.awt.headless=true
-Datlassian.standalone=JIRA
-Dorg.apache.jasper.runtime.BodyContentImpl.LIMIT_BUFFER=true
-Dmail.mime.decodeparameters=true
Initial memory pool:
256
MB
Maximum memory pool:
768
MB
Thread stack size:
KB
OK
Cancel
Apply

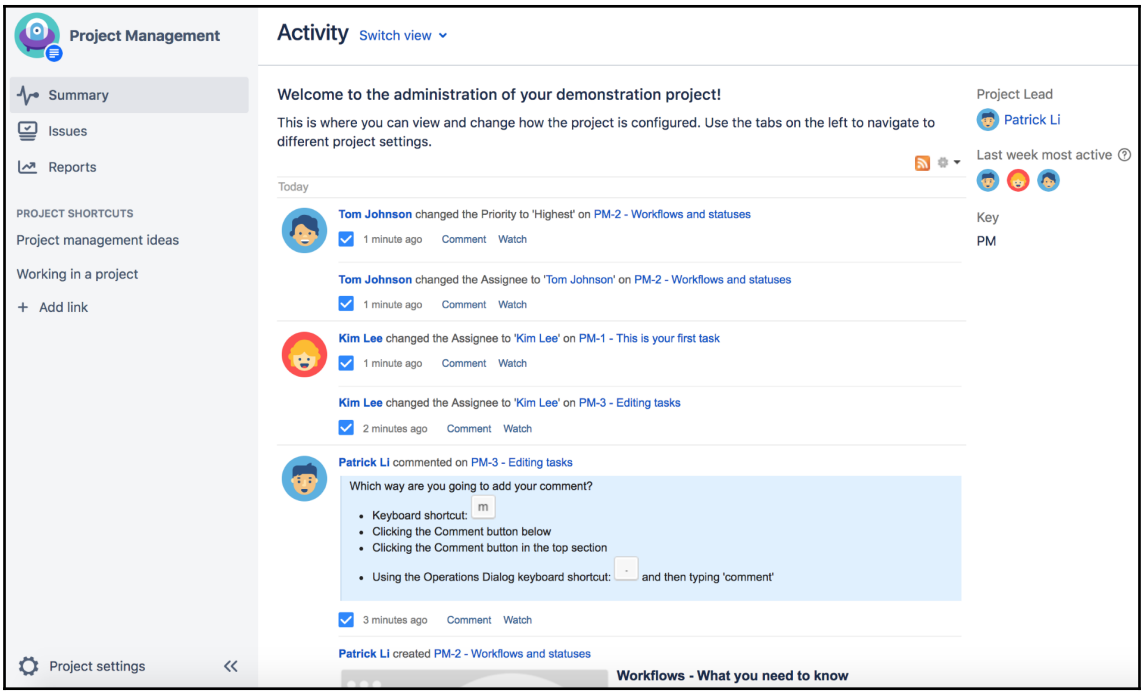
Chapter 2: Jira for Business Projects

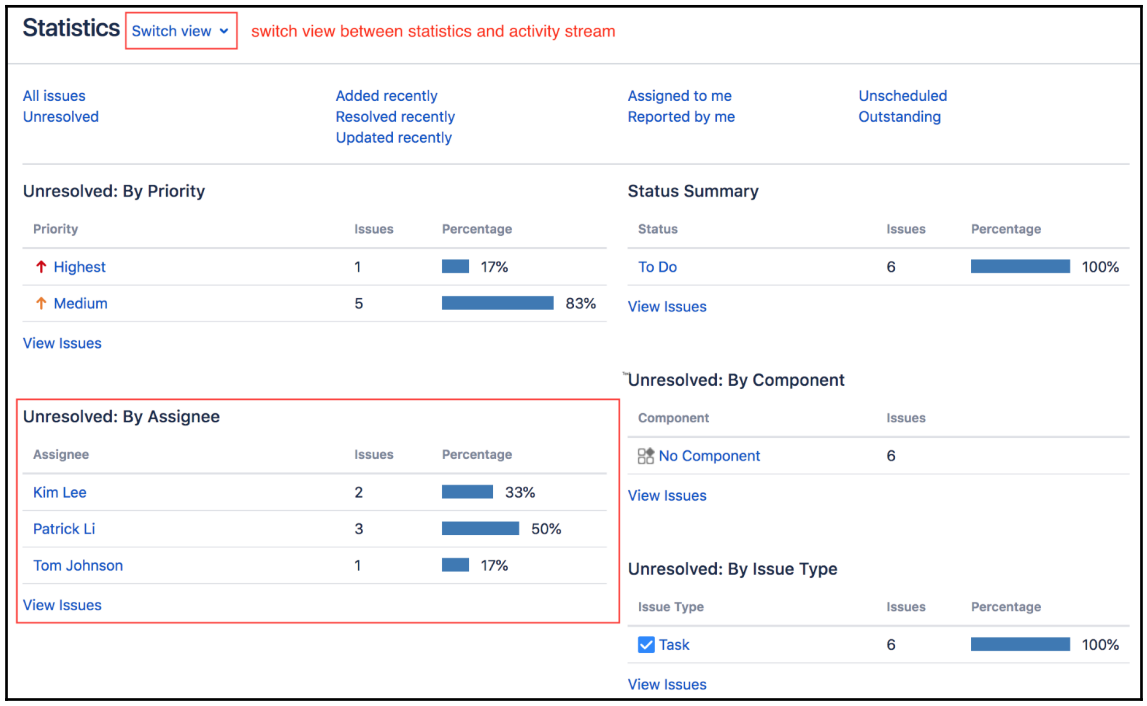


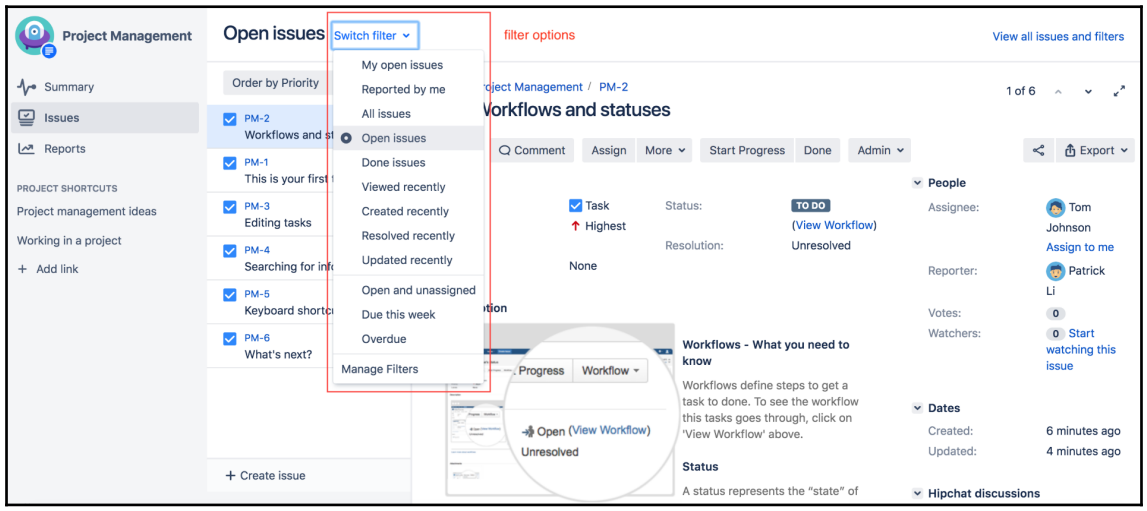


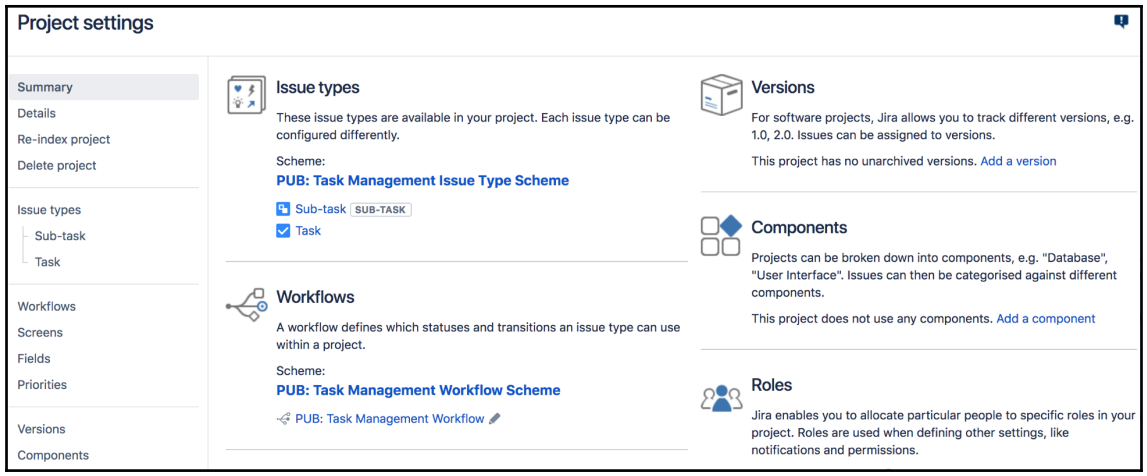

Task management
Name
Demonstration Project
Max. 80 characters.
Key
DEMO
Max. 10 characters.
Project Lead
Patrick Li
Enter the username of the Project Lead.
Back
Submit
Cancel

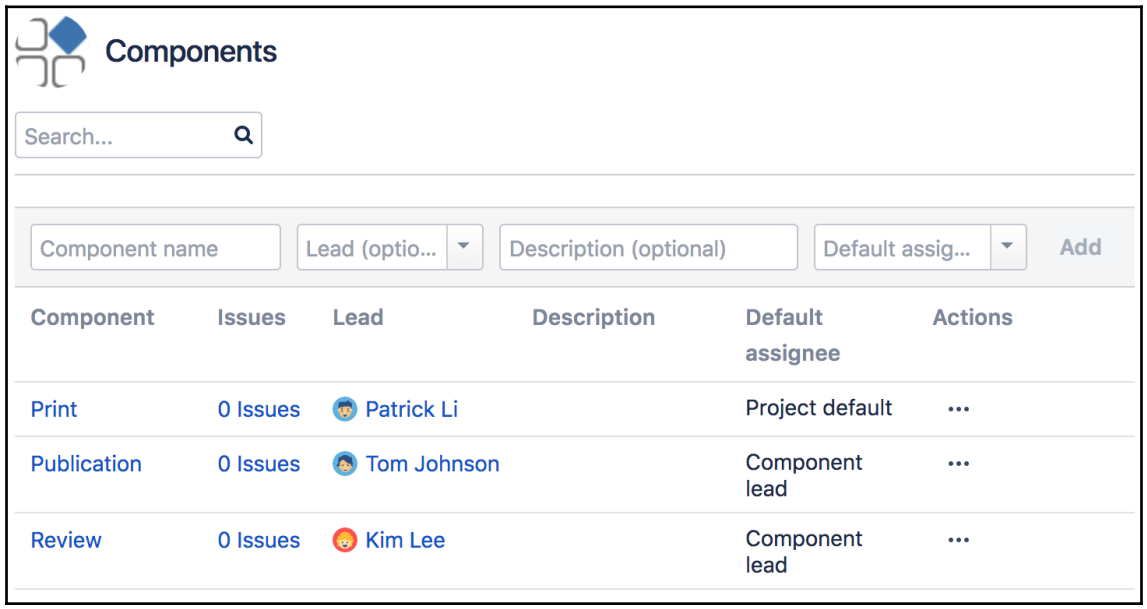

Scrum
SCRUM board
Backlog
Active sprints
Releases
Reports
Issues
Components
PROJECT SHORTCUTS
Add a link to useful information for your whole team to see.
VERSIONS
EPICS
Backlog
Board
QUICK FILTERS:
Only My Issues
Recently Updated
Sample Sprint 2 6 issues ACTIVE
11/Nov/18 6:08 AM • 25/Nov/18 6:28 AM
SCRUM-10 As a developer, I can update story and task status with drag and drop (click the triangle at far left of this story to sho
Version 2.0
SCRUM-13 As a developer, I can update details on an item using the Detail View >> Click the "SCRUM-13" link at the top of this
Version 2.0
SCRUM-14 As a user, I can find important items on the board by using the customisable "Quick Filters" above >> Try clicking the "Only My Issu
SCRUM-15 As a scrum master, I can see the progress of a sprint via the Burndown Chart >> Click "Reports" to view the Burndown Chart
SCRUM-16 As a team, we can finish the sprint by clicking the cog icon next to the sprint name above the "To Do" column then selecting "Complete
SCRUM-17 Instructions for deleting this sample board and project are in the description for this issue >> Click the "SCRUM-17" link and read t

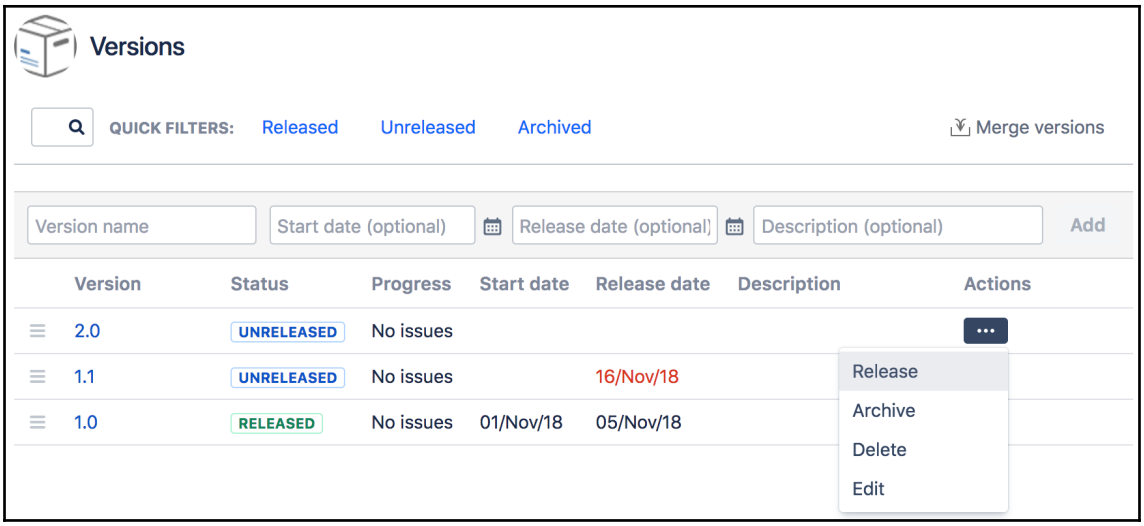

Project Management
Summary
Issues
Reports
PROJECT SHORTCUTS
Project management ideas
Working in a project
Add link
Project settings
Activity
Switch view
Welcome to the administration of your demonstration project!
This is where you can view and change how the project is configured. Use the tabs on the left to navigate to different project settings.
Today
Tom Johnson changed the Priority to 'Highest' on PM-2 - Workflows and statuses
1 minute ago Comment Watch
Tom Johnson changed the Assignee to 'Tom Johnson' on PM-2 - Workflows and statuses
1 minute ago Comment Watch
Kim Lee changed the Assignee to 'Kim Lee' on PM-1 - This is your first task
1 minute ago Comment Watch
Kim Lee changed the Assignee to 'Kim Lee' on PM-3 - Editing tasks
2 minutes ago Comment Watch
Patrick Li commented on PM-3 - Editing tasks
Which way are you going to add your comment?
Keyboard shortcut: m
Clicking the Comment button below
Clicking the Comment button in the top section
Using the Operations Dialog keyboard shortcut: . and then typing 'comment'
3 minutes ago Comment Watch
Patrick Li created PM-2 - Workflows and statuses
Workflows - What you need to know
Project Lead
Patrick Li
Last week most active
Key
PM

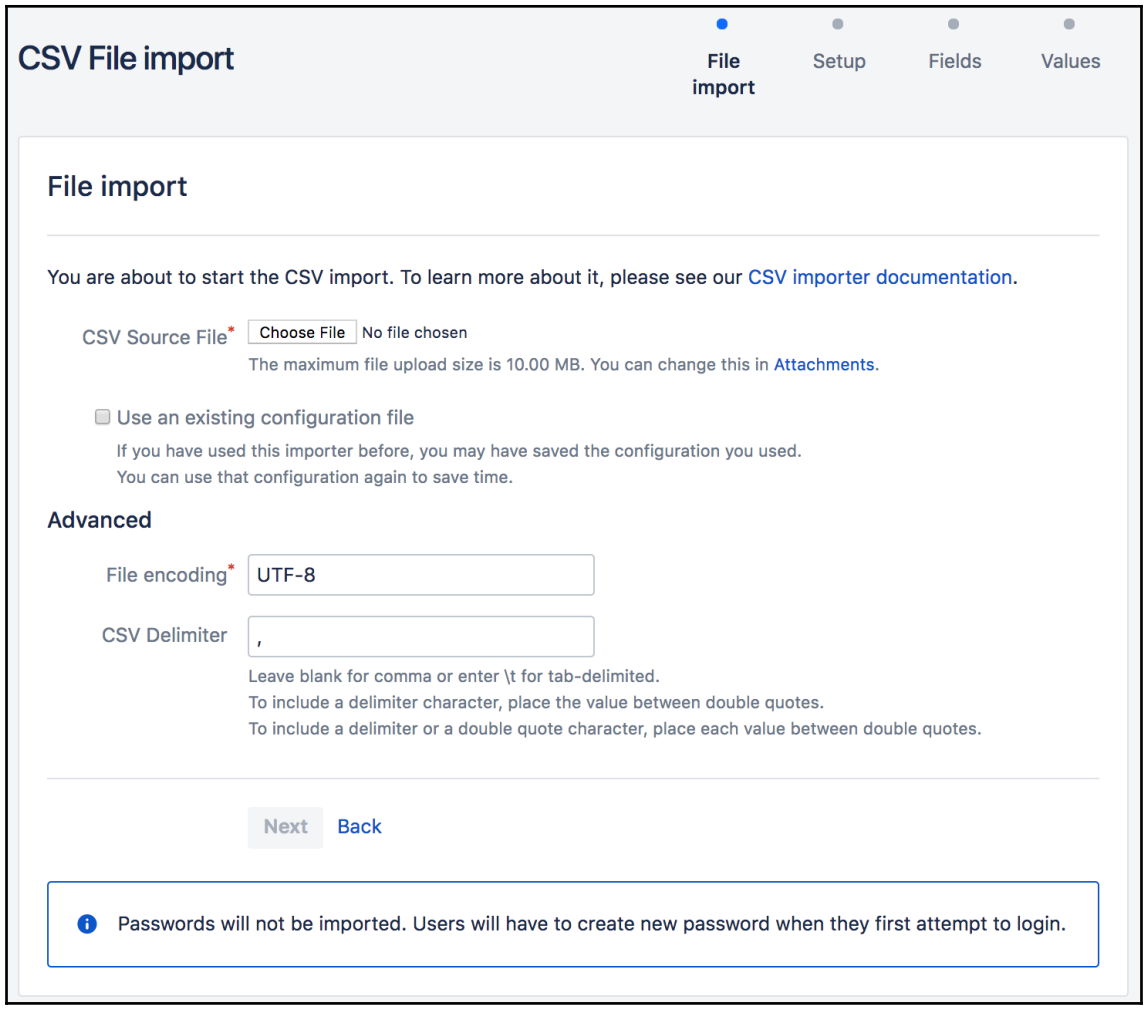

Statistics
Switch view
switch view between statistics and activity stream
All issues
Unresolved
Added recently
Resolved recently
Updated recently
Assigned to me
Reported by me
Unscheduled
Outstanding
Unresolved: By Priority
Priority
Issues
Percentage
Highest
1
17%
Medium
5
83%
View Issues
Status Summary
Status
Issues
Percentage
To Do
6
100%
View Issues
Unresolved: By Assignee
Assignee
Issues
Percentage
Kim Lee
2
33%
Patrick Li
3
50%
Tom Johnson
1
17%
View Issues
Unresolved: By Component
Component
Issues
No Component
6
View Issues
Unresolved: By Issue Type
Issue Type
Issues
Percentage
Task
6
100%
View Issues

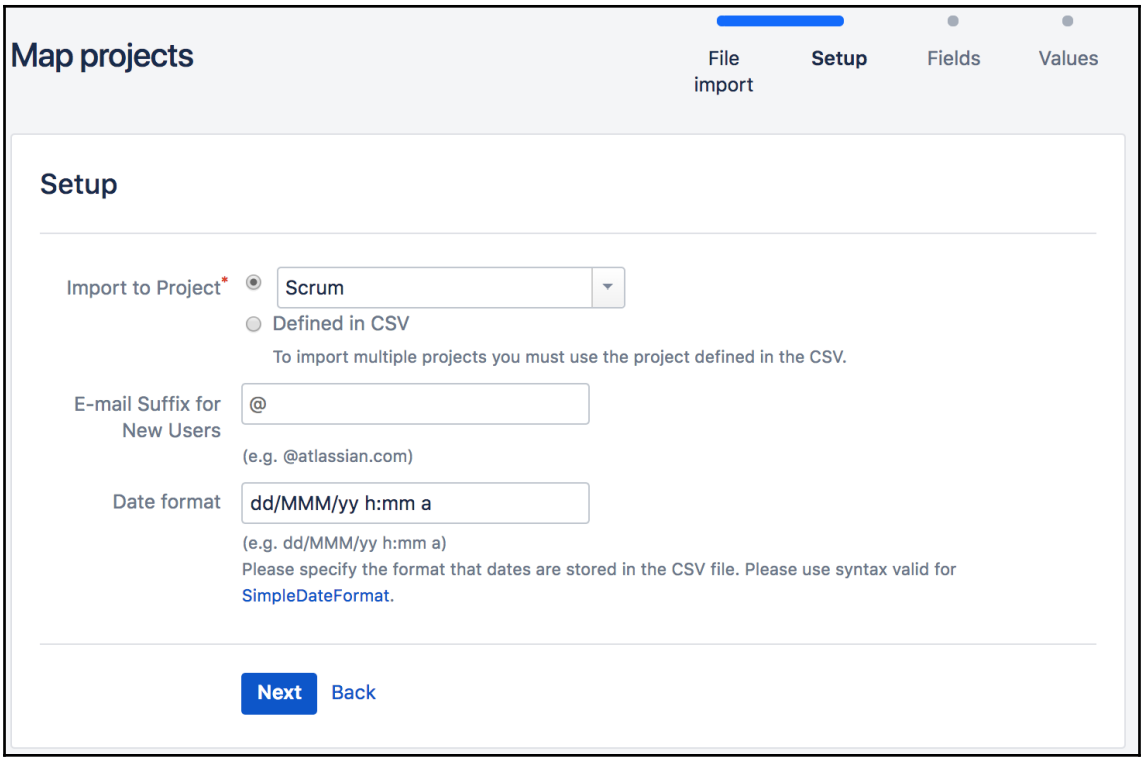

Project Management
Summary
Issues
Reports
PROJECT SHORTCUTS
Project management ideas
Working in a project
Add link
Open issues
Switch filter
filter options
View all issues and filters
My open issues
Reported by me
All issues
Open issues
Done issues
Viewed recently
Created recently
Resolved recently
Updated recently
Open and unassigned
Due this week
Overdue
Manage Filters
Order by Priority
PM-2
PM-1
PM-3
Editing tasks
PM-4
PM-5
PM-6
What's next?
Create issue
PM-2
1 of 6
Workflows and statuses
Comment
Assign
More
Start Progress
Done
Admin
Export
Task
Highest
Status:
TO DO
(View Workflow)
Resolution:
Unresolved
None
People
Assignee:
Tom Johnson
Assign to me
Reporter:
Patrick Li
Votes:
0
Watchers:
0 Start watching this issue
Workflows - What you need to know
Workflows define steps to get a task to done. To see the workflow this tasks goes through, click on 'View Workflow' above.
Status
A status represents the "state" of
Progress
Workflow
Open (View Workflow)
Unresolved
Dates
Created:
6 minutes ago
Updated:
4 minutes ago
Hipchat discussions

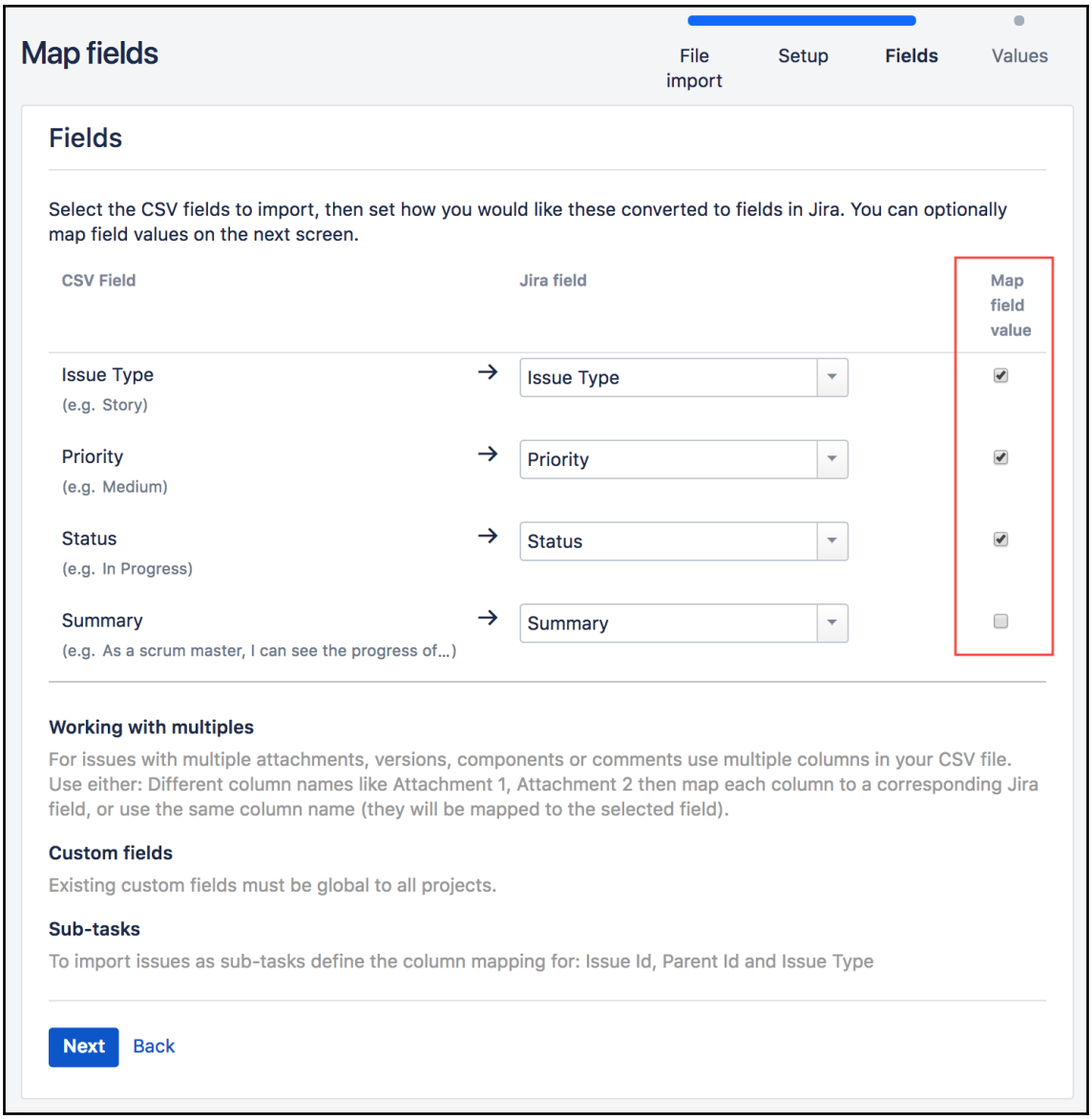

Project settings
Summary
Details
Re-index project
Delete project
Issue types
Sub-task
Task
Workflows
Screens
Fields
Priorities
Versions
Components
Issue types
These issue types are available in your project. Each issue type can be configured differently.
Scheme:
PUB: Task Management Issue Type Scheme
Sub-task SUB-TASK
Task
Workflows
A workflow defines which statuses and transitions an issue type can use within a project.
Scheme:
PUB: Task Management Workflow Scheme
PUB: Task Management Workflow
Versions
For software projects, Jira allows you to track different versions, e.g. 1.0, 2.0. Issues can be assigned to versions.
This project has no unarchived versions. Add a version
Components
Projects can be broken down into components, e.g. "Database", "User Interface". Issues can then be categorised against different components.
This project does not use any components. Add a component
Roles
Jira enables you to allocate particular people to specific roles in your project. Roles are used when defining other settings, like notifications and permissions.

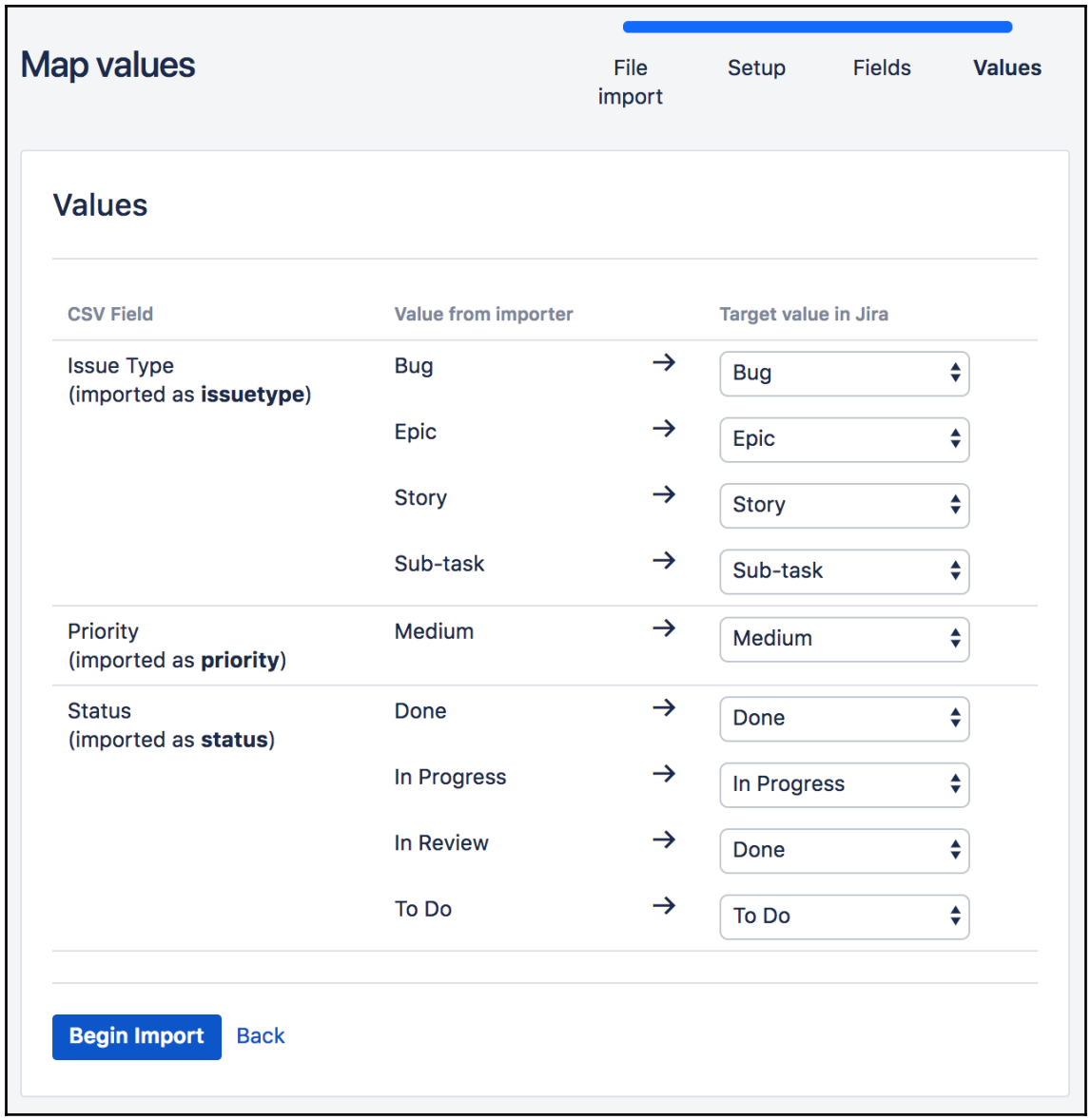

Components
Search...
Component name
Lead (optio...
Description (optional)
Default assig...
Add
Component
Issues
Lead
Description
Default assignee
Actions
Print
0 Issues
Patrick Li
Project default
Publication
0 Issues
Tom Johnson
Component lead
Review
0 Issues
Kim Lee
Component lead


Versions
QUICK FILTERS:
Released
Unreleased
Archived
Merge versions
Version name
Start date (optional)
Release date (optional)
Description (optional)
Add
Version
Status
Progress
Start date
Release date
Description
Actions
2.0
UNRELEASED
No issues
1.1
UNRELEASED
No issues
16/Nov/18
1.0
RELEASED
No issues
01/Nov/18
05/Nov/18
Release
Archive
Delete
Edit


CSV File import
File import
Setup
Fields
Values
File import
You are about to start the CSV import. To learn more about it, please see our CSV importer documentation.
CSV Source File*
Choose File
No file chosen
The maximum file upload size is 10.00 MB. You can change this in Attachments.
Use an existing configuration file
If you have used this importer before, you may have saved the configuration you used.
You can use that configuration again to save time.
Advanced
File encoding*
UTF-8
CSV Delimiter
,
Leave blank for comma or enter \t for tab-delimited.
To include a delimiter character, place the value between double quotes.
To include a delimiter or a double quote character, place each value between double quotes.
Next
Back
Passwords will not be imported. Users will have to create new password when they first attempt to login.


Map projects
File import
Setup
Fields
Values
Setup
Import to Project*
Scrum
Defined in CSV
To import multiple projects you must use the project defined in the CSV.
E-mail Suffix for New Users
@
(e.g. @atlassian.com)
Date format
dd/MMM/yy h:mm a
(e.g. dd/MMM/yy h:mm a)
Please specify the format that dates are stored in the CSV file. Please use syntax valid for SimpleDateFormat.
Next
Back


Map fields
File import
Setup
Fields
Values
Fields
Select the CSV fields to import, then set how you would like these converted to fields in Jira. You can optionally map field values on the next screen.
CSV Field
Jira field
Map field value
Issue Type
(e.g. Story)
Issue Type
Priority
(e.g. Medium)
Priority
Status
(e.g. In Progress)
Status
Summary
(e.g. As a scrum master, I can see the progress of...)
Summary
Working with multiples
For issues with multiple attachments, versions, components or comments use multiple columns in your CSV file. Use either: Different column names like Attachment 1, Attachment 2 then map each column to a corresponding Jira field, or use the same column name (they will be mapped to the selected field).
Custom fields
Existing custom fields must be global to all projects.
Sub-tasks
To import issues as sub-tasks define the column mapping for: Issue Id, Parent Id and Issue Type
Next
Back

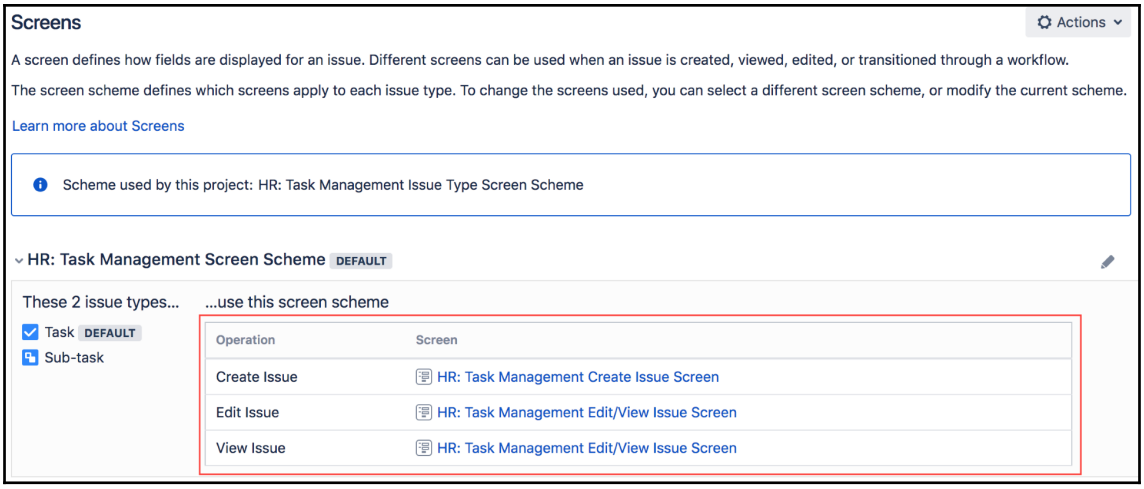

Map values
File import
Setup
Fields
Values
Values
CSV Field
Value from importer
Target value in Jira
Issue Type (imported as issuetype)
Bug
Bug
Epic
Epic
Story
Story
Sub-task
Sub-task
Priority (imported as priority)
Medium
Medium
Status (imported as status)
Done
Done
In Progress
In Progress
In Review
Done
To Do
To Do
Begin Import
Back

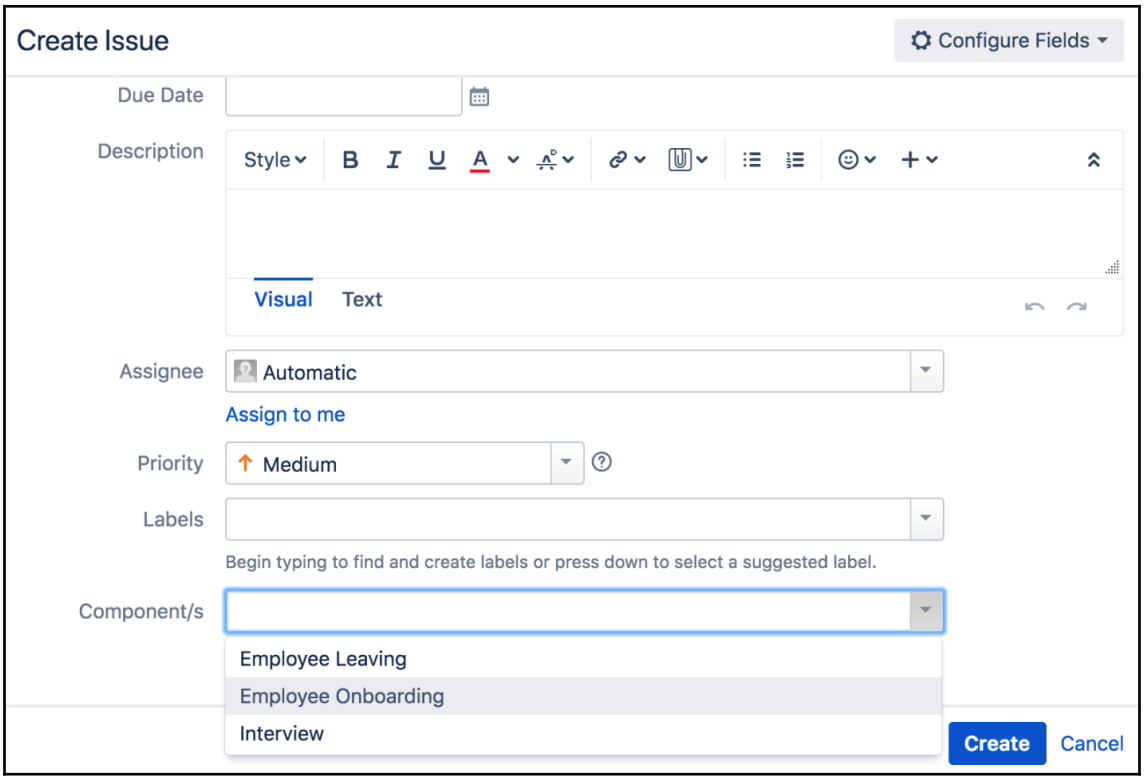
1 projects and 23 issues imported successfully!

What now?

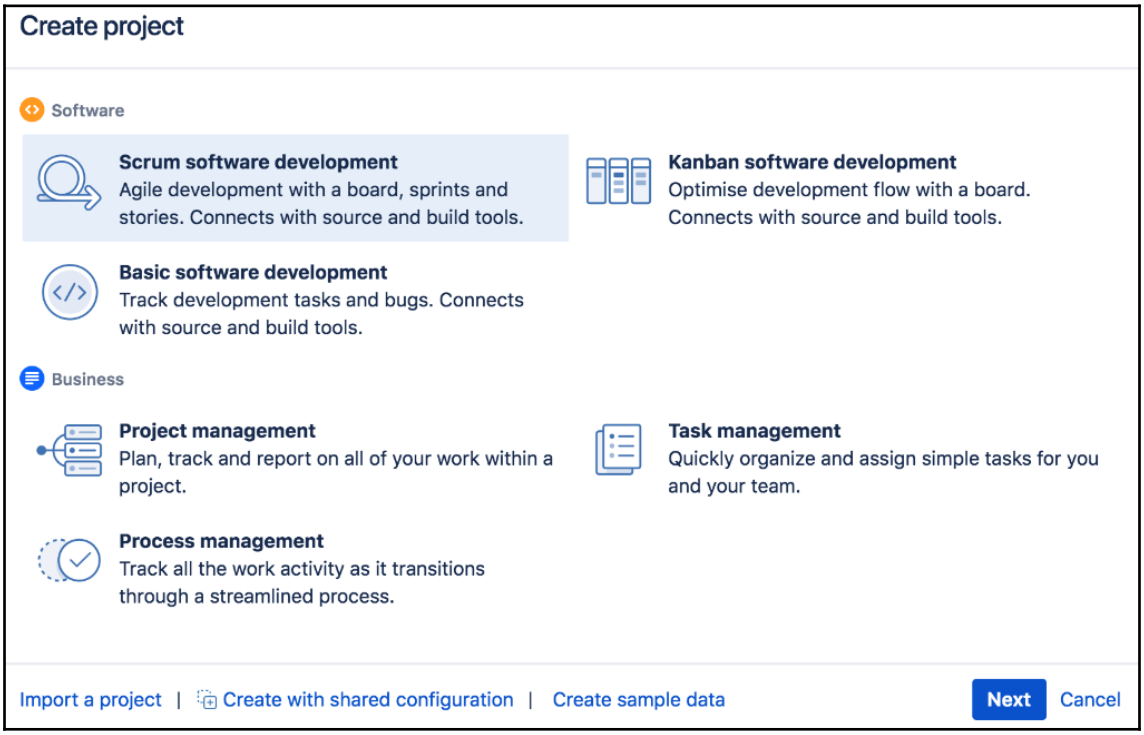
You can download a detailed log of this import. You can also save the configuration for future use.

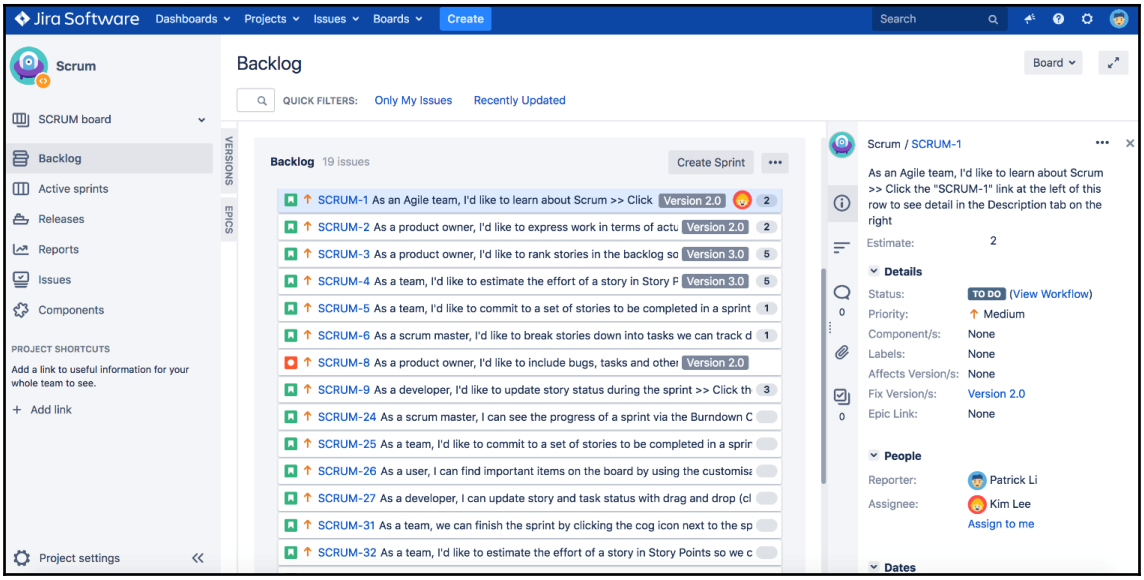
Import another project.

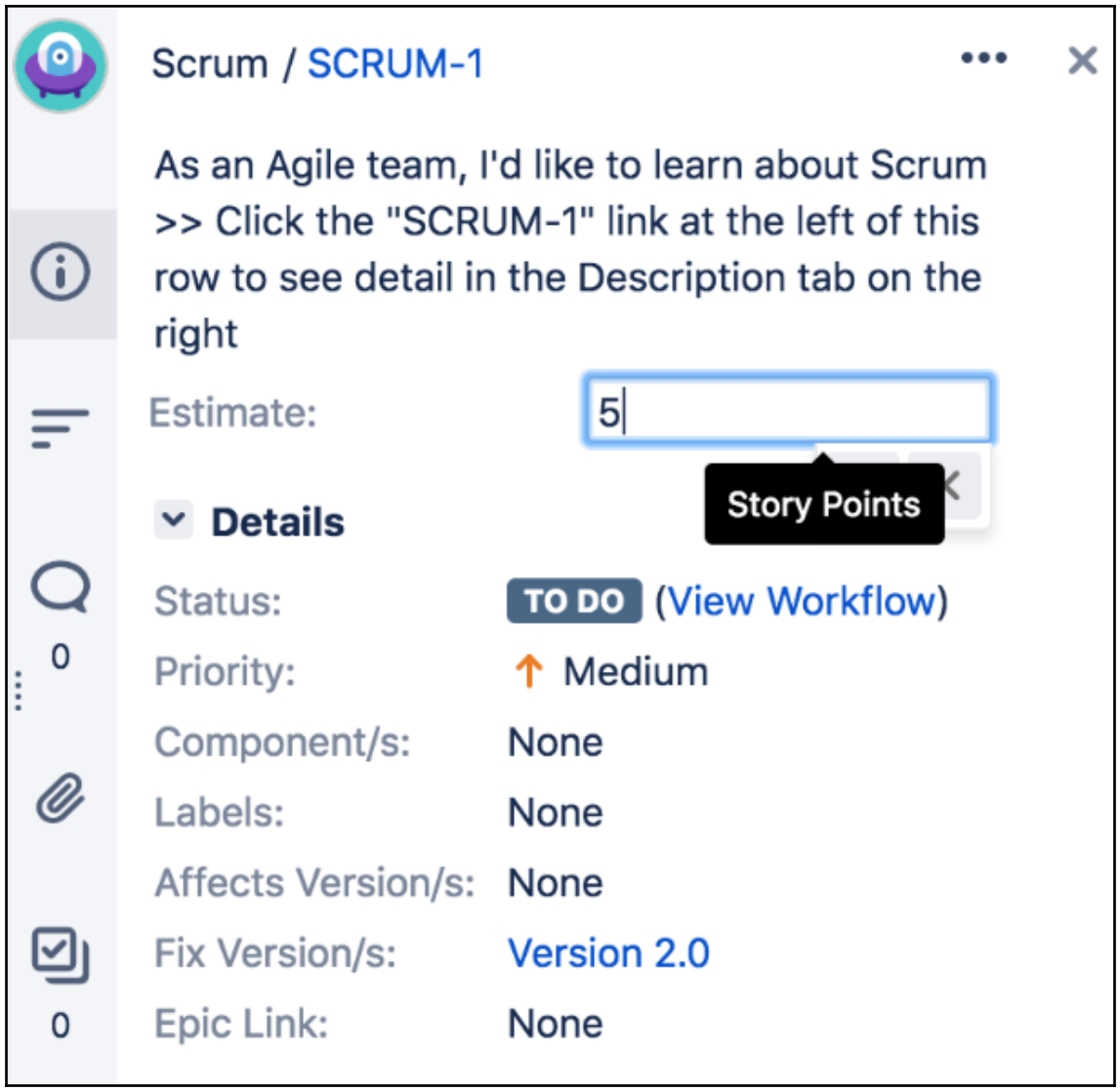


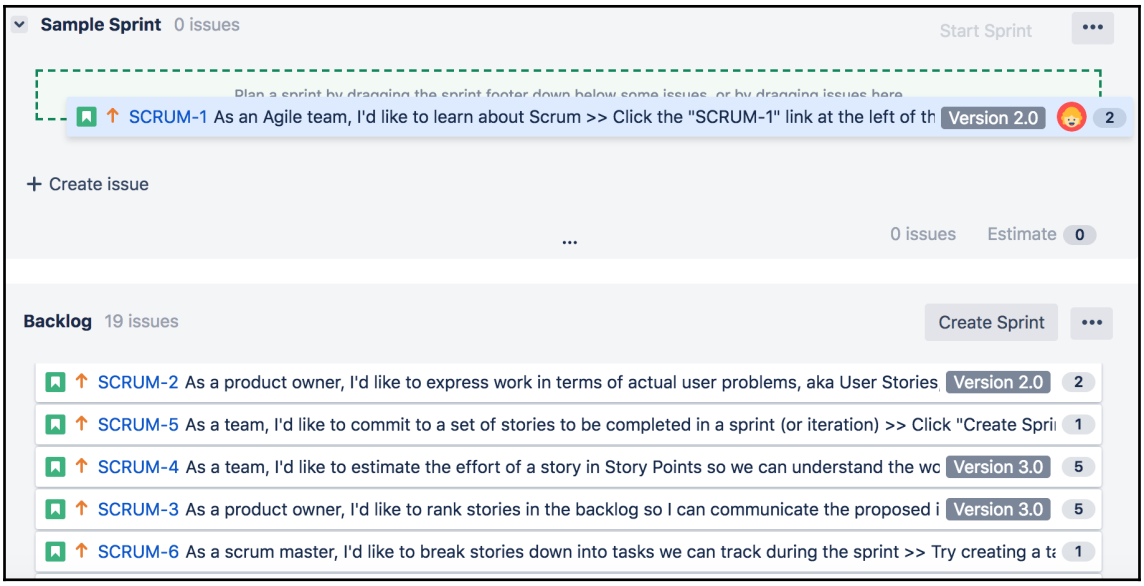

Create Issue
Configure Fields
Due Date
Description
Style
Visual
Text
Assignee
Automatic
Assign to me
Priority
Medium
Labels
Begin typing to find and create labels or press down to select a suggested label.
Component/s
Employee Leaving
Employee Onboarding
Interview
Create
Cancel

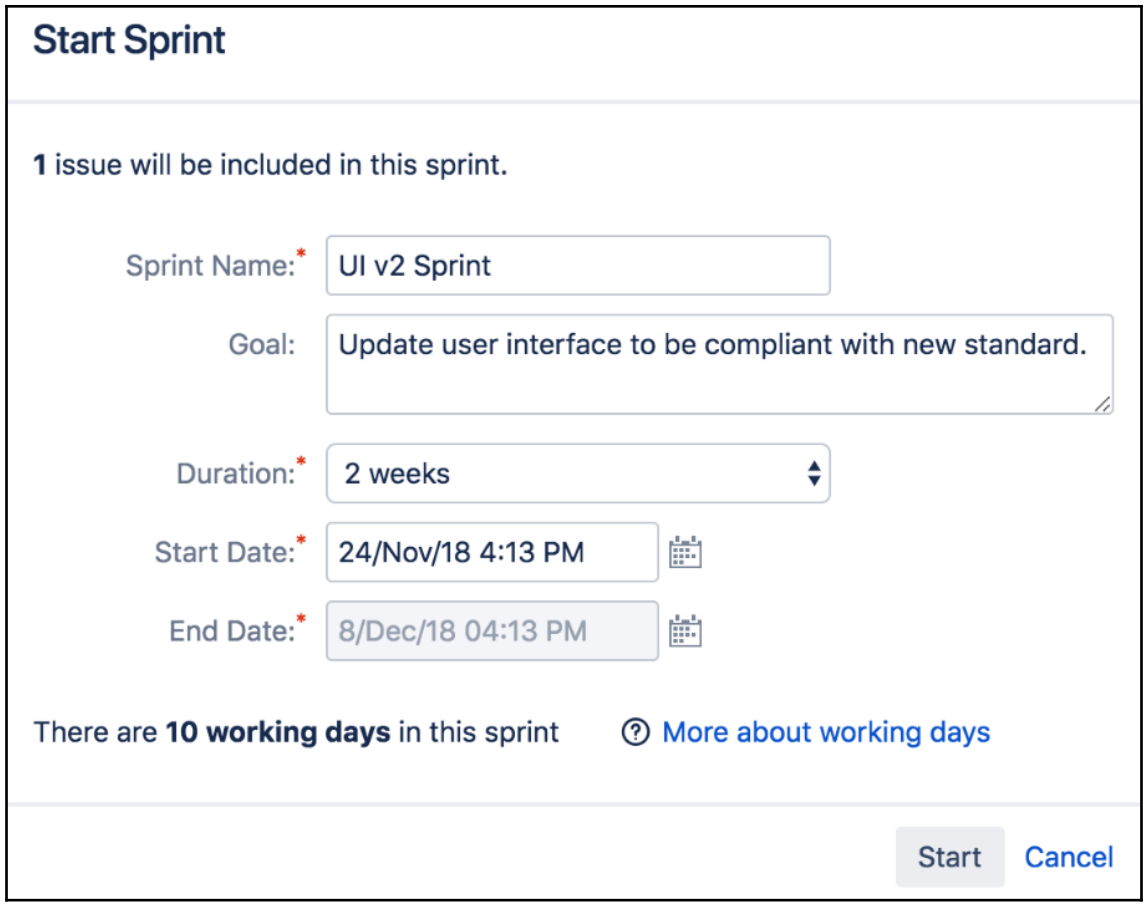
Chapter 3: Jira for Agile Projects

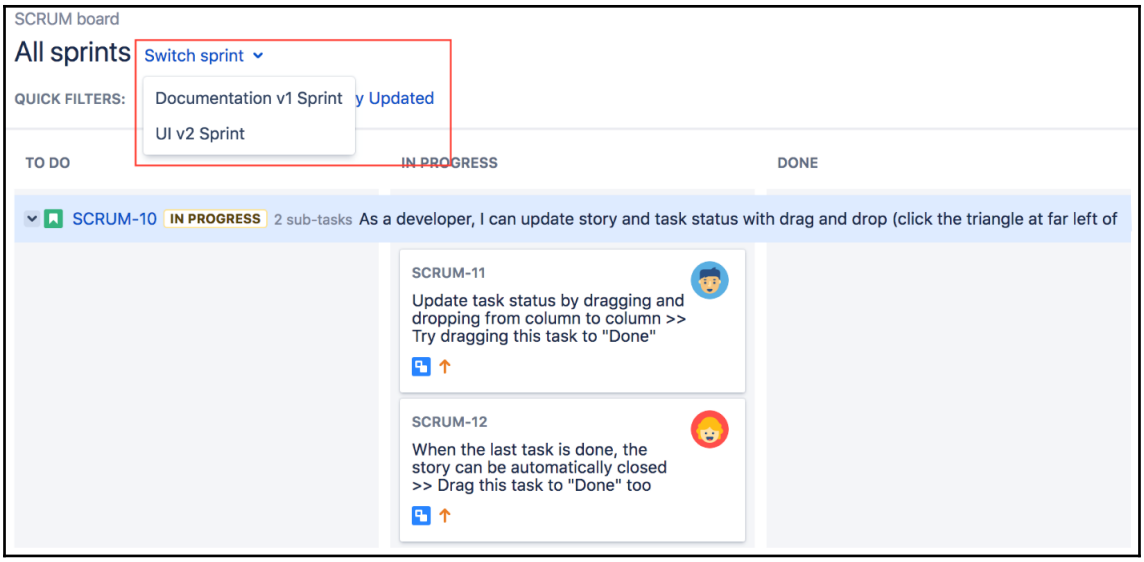


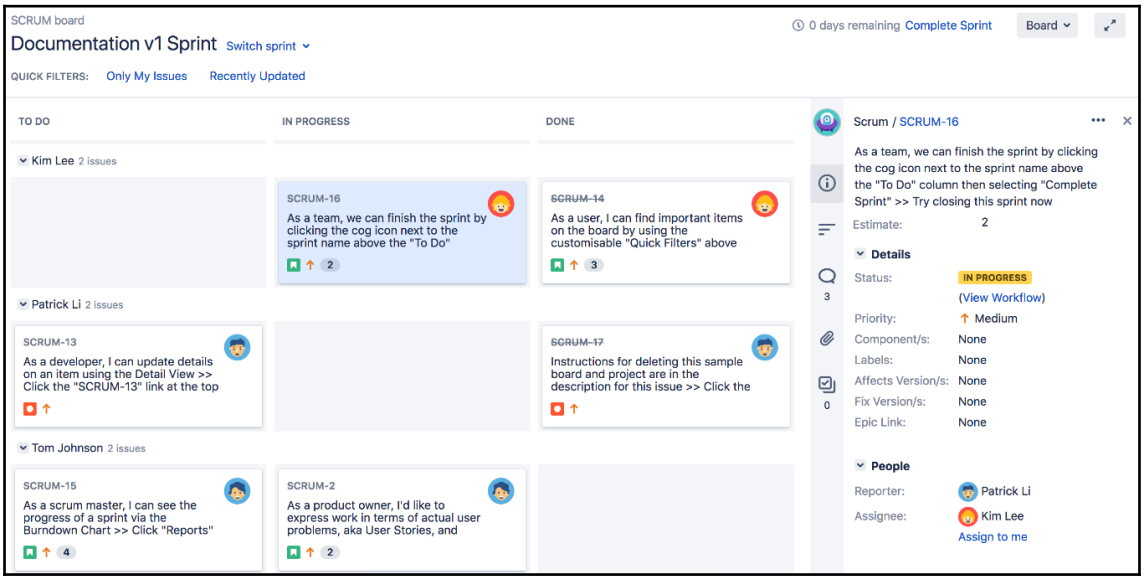

Jira Software
Dashboards
Projects
Issues
Boards
Create
Search
Scrum
SCRUM board
Backlog
Active sprints
Releases
Reports
Issues
Components
PROJECT SHORTCUTS
Add a link to useful information for your whole team to see.
Add link
Project settings
Backlog
Board
QUICK FILTERS:
Only My Issues
Recently Updated
VERSIONS
EPICS
Backlog 19 issues
Create Sprint
SCRUM-1 As an Agile team, I'd like to learn about Scrum >> Click Version 2.0 2
SCRUM-2 As a product owner, I'd like to express work in terms of actu Version 2.0 2
SCRUM-3 As a product owner, I'd like to rank stories in the backlog so Version 3.0 5
SCRUM-4 As a team, I'd like to estimate the effort of a story in Story P Version 3.0 5
SCRUM-5 As a team, I'd like to commit to a set of stories to be completed in a sprint 1
SCRUM-6 As a scrum master, I'd like to break stories down into tasks we can track d 1
SCRUM-8 As a product owner, I'd like to include bugs, tasks and other Version 2.0
SCRUM-9 As a developer, I'd like to update story status during the sprint >> Click th 3
SCRUM-24 As a scrum master, I can see the progress of a sprint via the Burndown C
SCRUM-25 As a team, I'd like to commit to a set of stories to be completed in a sprir
SCRUM-26 As a user, I can find important items on the board by using the customisa
SCRUM-27 As a developer, I can update story and task status with drag and drop (cl
SCRUM-31 As a team, we can finish the sprint by clicking the cog icon next to the sp
SCRUM-32 As a team, I'd like to estimate the effort of a story in Story Points so we c
Scrum / SCRUM-1
As an Agile team, I'd like to learn about Scrum >> Click the "SCRUM-1" link at the left of this row to see detail in the Description tab on the right
Estimate: 2
Details
Status: TO DO (View Workflow)
Priority: Medium
Component/s: None
Labels: None
Affects Version/s: None
Fix Version/s: Version 2.0
Epic Link: None
People
Reporter: Patrick Li
Assignee: Kim Lee
Assign to me
Dates

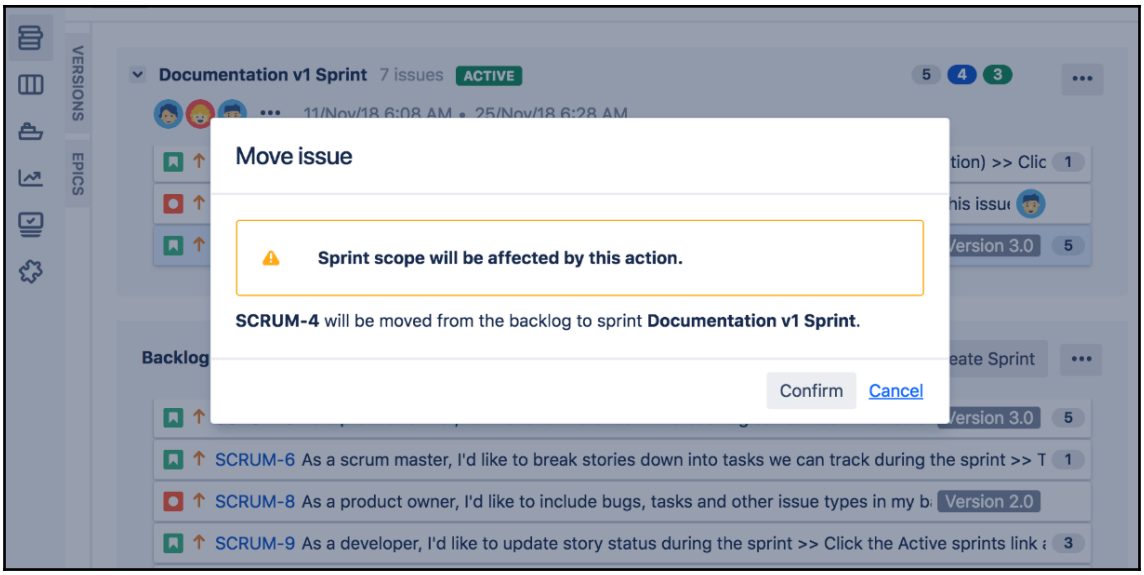

Scrum / SCRUM-1
As an Agile team, I'd like to learn about Scrum >> Click the "SCRUM-1" link at the left of this row to see detail in the Description tab on the right
Estimate:
5
Story Points
Details
Status:
TO DO
(View Workflow)
Priority:
Medium
Component/s:
None
Labels:
None
Affects Version/s:
None
Fix Version/s:
Version 2.0
Epic Link:
None
0
0

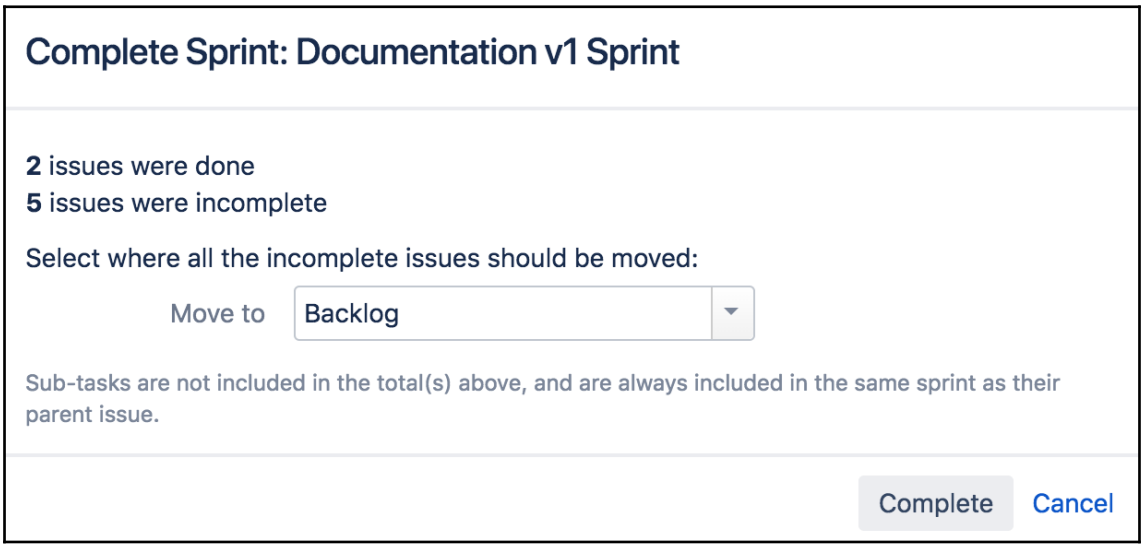

Sample Sprint 0 issues
Start Sprint
SCRUM-1 As an Agile team, I'd like to learn about Scrum >> Click the "SCRUM-1" link at the left of th
Version 2.0
2
Create issue
0 issues
Estimate 0
Backlog 19 issues
Create Sprint
SCRUM-2 As a product owner, I'd like to express work in terms of actual user problems, aka User Stories
Version 2.0
2
SCRUM-5 As a team, I'd like to commit to a set of stories to be completed in a sprint (or iteration) >> Click "Create Spri
1
SCRUM-4 As a team, I'd like to estimate the effort of a story in Story Points so we can understand the wo
Version 3.0
5
SCRUM-3 As a product owner, I'd like to rank stories in the backlog so I can communicate the proposed i
Version 3.0
5
SCRUM-6 As a scrum master, I'd like to break stories down into tasks we can track during the sprint >> Try creating a ta
1

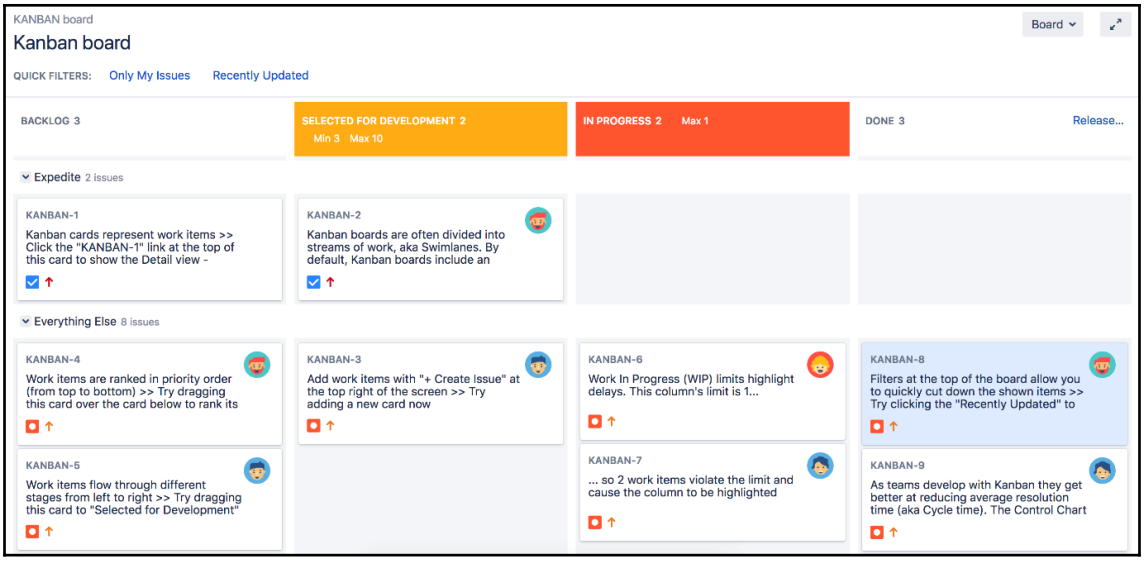

Start Sprint
1 issue will be included in this sprint.
Sprint Name:*
UI v2 Sprint
Goal:
Update user interface to be compliant with new standard.
Duration:*
2 weeks
Start Date:*
24/Nov/18 4:13 PM
End Date:*
8/Dec/18 04:13 PM
There are 10 working days in this sprint
More about working days
Start
Cancel

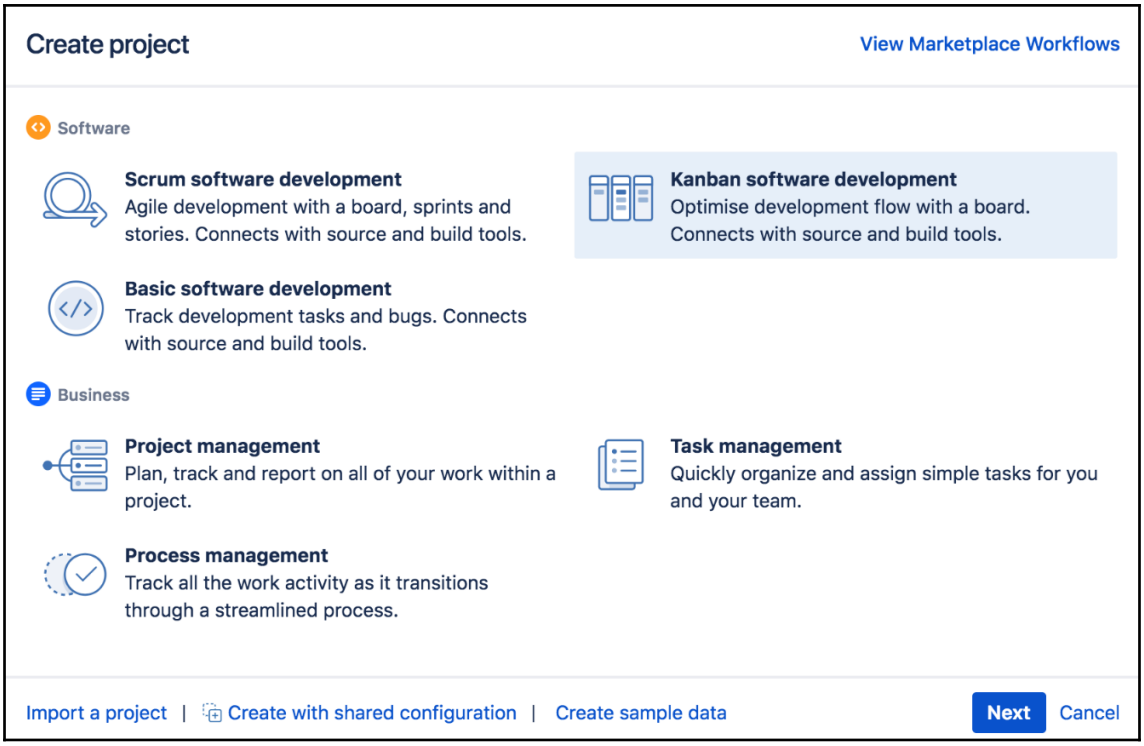

SCRUM board
All sprints
Switch sprint
QUICK FILTERS:
Documentation v1 Sprint
UI v2 Sprint
y Updated
TO DO
IN PROGRESS
DONE
SCRUM-10 IN PROGRESS 2 sub-tasks As a developer, I can update story and task status with drag and drop (click the triangle at far left of
SCRUM-11
Update task status by dragging and dropping from column to column >> Try dragging this task to "Done"
SCRUM-12
When the last task is done, the story can be automatically closed >> Drag this task to "Done" too

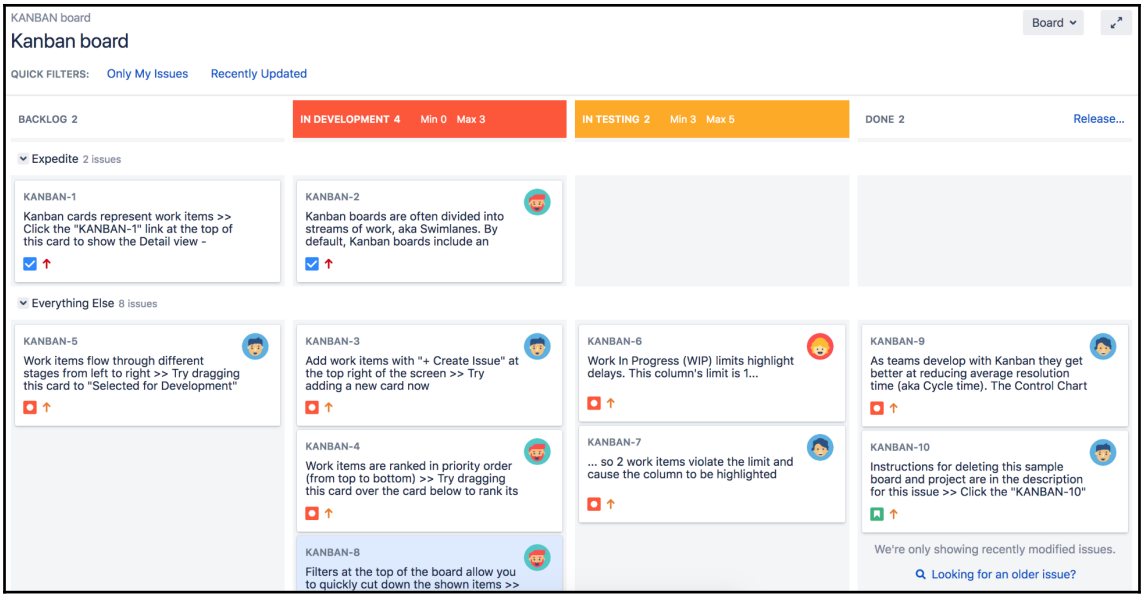

SCRUM board
Documentation v1 Sprint
Switch sprint
0 days remaining
Complete Sprint
Board
QUICK FILTERS:
Only My Issues
Recently Updated
TO DO
IN PROGRESS
DONE
Kim Lee 2 issues
SCRUM-16
As a team, we can finish the sprint by clicking the cog icon next to the sprint name above the "To Do"
~~SCRUM-14~~
As a user, I can find important items on the board by using the customisable "Quick Filters" above
Patrick Li 2 issues
SCRUM-13
As a developer, I can update details on an item using the Detail View >> Click the "SCRUM-13" link at the top
~~SCRUM-17~~
Instructions for deleting this sample board and project are in the description for this issue >> Click the
Tom Johnson 2 issues
SCRUM-15
As a scrum master, I can see the progress of a sprint via the Burndown Chart >> Click "Reports"
SCRUM-2
As a product owner, I'd like to express work in terms of actual user problems, aka User Stories, and
Scrum / SCRUM-16
As a team, we can finish the sprint by clicking the cog icon next to the sprint name above the "To Do" column then selecting "Complete Sprint" >> Try closing this sprint now
Estimate: 2
Details
Status: IN PROGRESS
(View Workflow)
Priority: Medium
Component/s: None
Labels: None
Affects Version/s: None
Fix Version/s: None
Epic Link: None
People
Reporter: Patrick Li
Assignee: Kim Lee
Assign to me

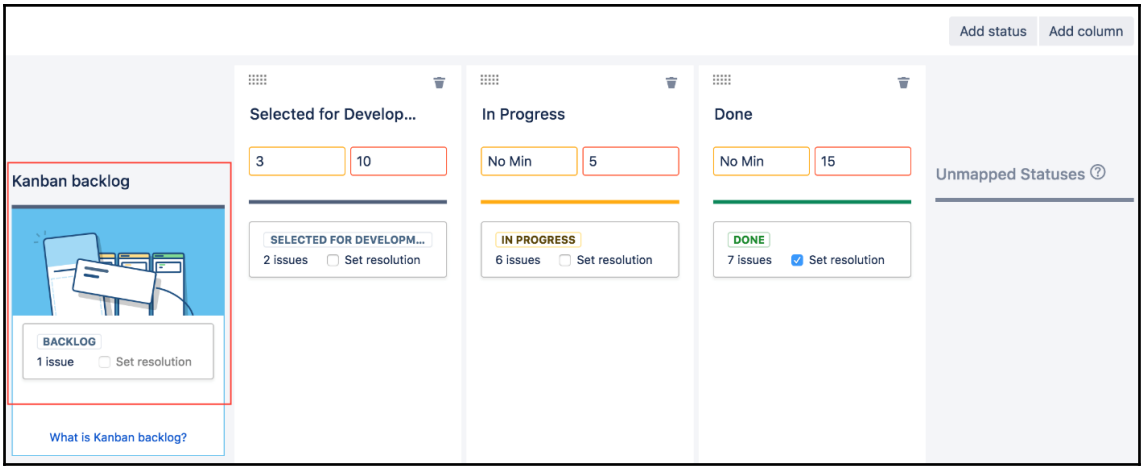

VERSIONS
EPICS
Documentation v1 Sprint 7 issues ACTIVE
Move issue
Sprint scope will be affected by this action.
SCRUM-4 will be moved from the backlog to sprint Documentation v1 Sprint.
Confirm
Cancel
Backlog
SCRUM-6 As a scrum master, I'd like to break stories down into tasks we can track during the sprint >> T
SCRUM-8 As a product owner, I'd like to include bugs, tasks and other issue types in my b.
SCRUM-9 As a developer, I'd like to update story status during the sprint >> Click the Active sprints link a

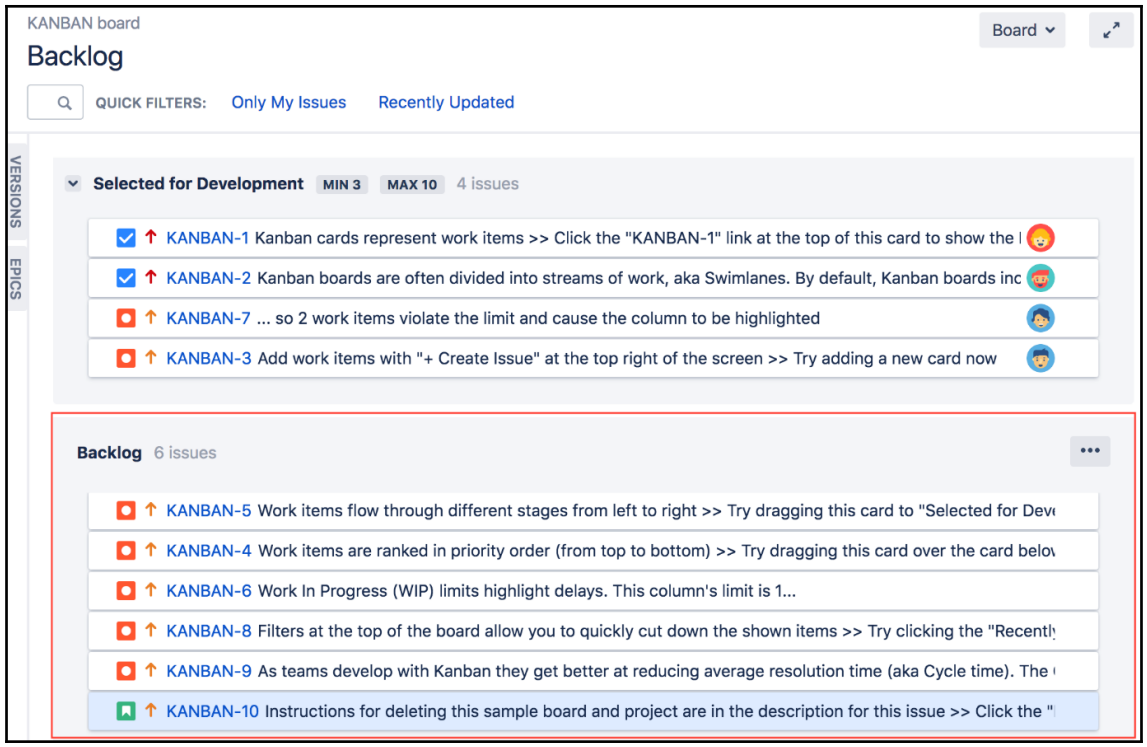

Complete Sprint: Documentation v1 Sprint
2 issues were done
5 issues were incomplete
Select where all the incomplete issues should be moved:
Move to
Backlog
Sub-tasks are not included in the total(s) above, and are always included in the same sprint as their parent issue.
Complete
Cancel

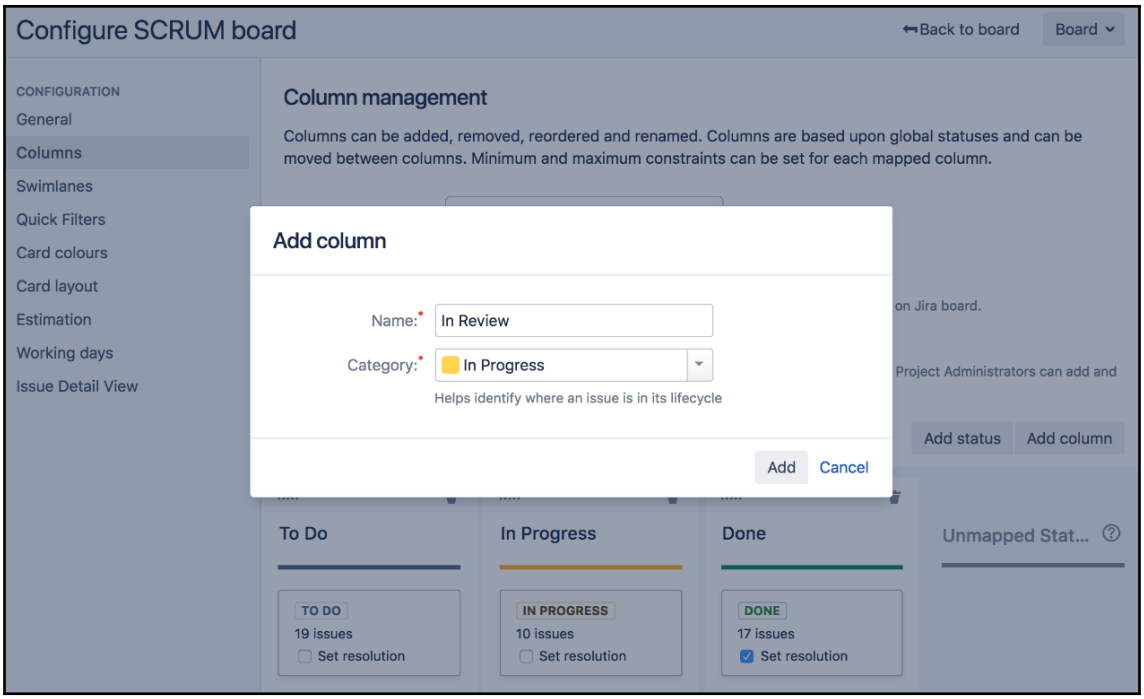

KANBAN board
Kanban board
Board
QUICK FILTERS: Only My Issues Recently Updated
BACKLOG 3
SELECTED FOR DEVELOPMENT 2
Min 3 Max 10
IN PROGRESS 2 Max 1
DONE 3
Release...
Expedite 2 issues
KANBAN-1
Kanban cards represent work items >> Click the "KANBAN-1" link at the top of this card to show the Detail view -
KANBAN-2
Kanban boards are often divided into streams of work, aka Swimlanes. By default, Kanban boards include an
Everything Else 8 issues
KANBAN-4
Work items are ranked in priority order (from top to bottom) >> Try dragging this card over the card below to rank its
KANBAN-3
Add work items with "+ Create Issue" at the top right of the screen >> Try adding a new card now
KANBAN-6
Work In Progress (WIP) limits highlight delays. This column's limit is 1...
KANBAN-8
Filters at the top of the board allow you to quickly cut down the shown items >> Try clicking the "Recently Updated" to
KANBAN-5
Work items flow through different stages from left to right >> Try dragging this card to "Selected for Development"
KANBAN-7
... so 2 work items violate the limit and cause the column to be highlighted
KANBAN-9
As teams develop with Kanban they get better at reducing average resolution time (aka Cycle time). The Control Chart

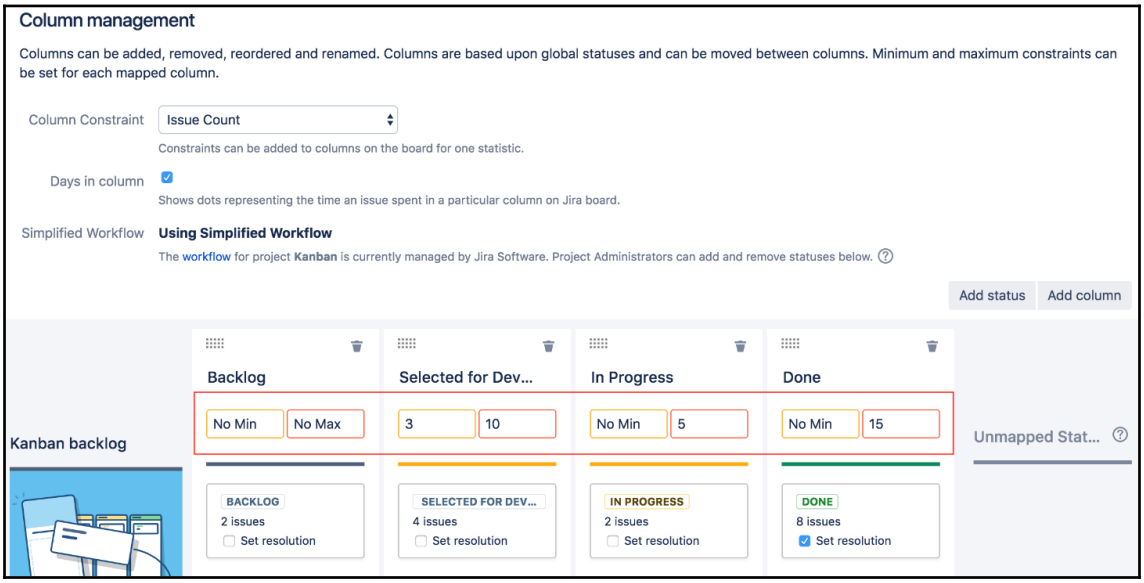

Create project
View Marketplace Workflows
Software
Scrum software development
Agile development with a board, sprints and stories. Connects with source and build tools.
Kanban software development
Optimise development flow with a board. Connects with source and build tools.
Basic software development
Track development tasks and bugs. Connects with source and build tools.
Business
Project management
Plan, track and report on all of your work within a project.
Task management
Quickly organize and assign simple tasks for you and your team.
Process management
Track all the work activity as it transitions through a streamlined process.
Import a project | Create with shared configuration | Create sample data
Next
Cancel

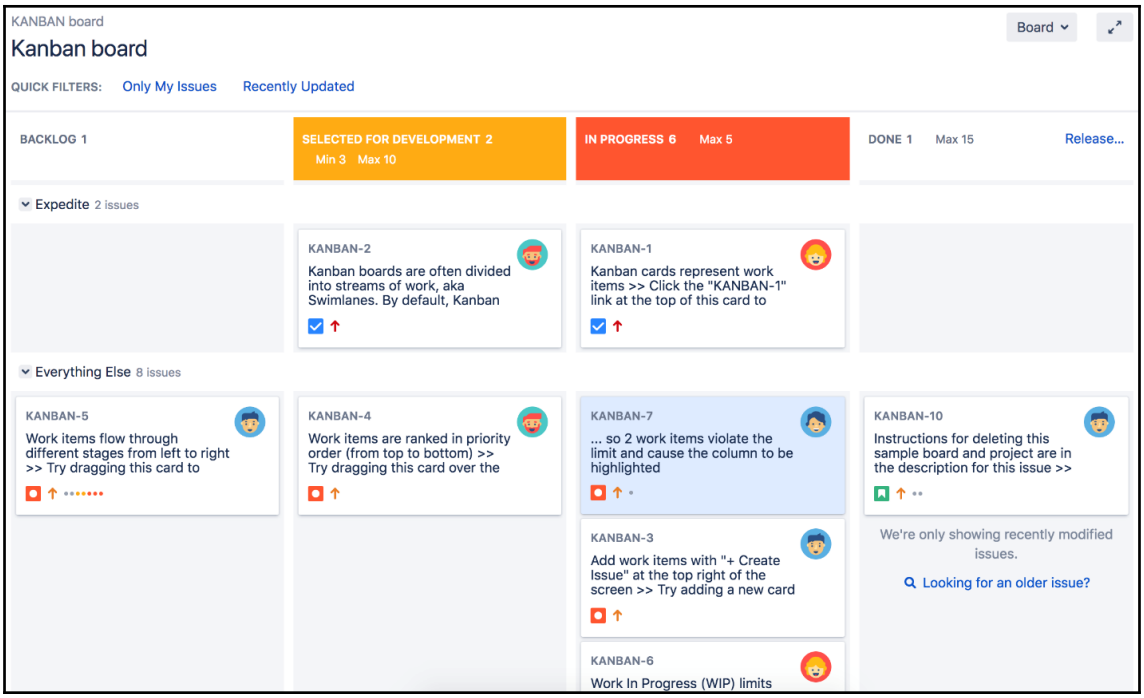

KANBAN board
Kanban board
Board
QUICK FILTERS: Only My Issues Recently Updated
BACKLOG 2
IN DEVELOPMENT 4 Min 0 Max 3
IN TESTING 2 Min 3 Max 5
DONE 2
Release...
Expedite 2 issues
KANBAN-1
Kanban cards represent work items >> Click the "KANBAN-1" link at the top of this card to show the Detail view -
KANBAN-2
Kanban boards are often divided into streams of work, aka Swimlanes. By default, Kanban boards include an
Everything Else 8 issues
KANBAN-5
Work items flow through different stages from left to right >> Try dragging this card to "Selected for Development"
KANBAN-3
Add work items with "+ Create Issue" at the top right of the screen >> Try adding a new card now
KANBAN-6
Work In Progress (WIP) limits highlight delays. This column's limit is 1...
KANBAN-9
As teams develop with Kanban they get better at reducing average resolution time (aka Cycle time). The Control Chart
KANBAN-4
Work items are ranked in priority order (from top to bottom) >> Try dragging this card over the card below to rank its
KANBAN-7
... so 2 work items violate the limit and cause the column to be highlighted
KANBAN-10
Instructions for deleting this sample board and project are in the description for this issue >> Click the "KANBAN-10"
KANBAN-8
Filters at the top of the board allow you to quickly cut down the shown items >>
We're only showing recently modified issues.
Looking for an older issue?

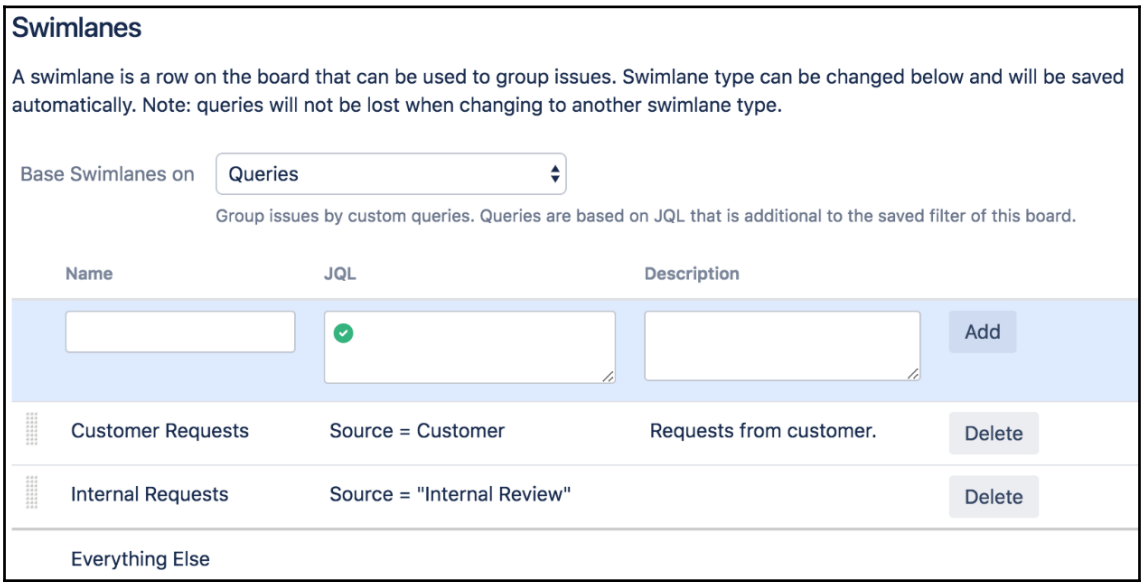

Add status
Add column
Kanban backlog
BACKLOG
1 issue
Set resolution
What is Kanban backlog?
Selected for Develop...
3
10
SELECTED FOR DEVELOPM...
2 issues
Set resolution
In Progress
No Min
5
IN PROGRESS
6 issues
Set resolution
Done
No Min
15
DONE
7 issues
Set resolution
Unmapped Statuses

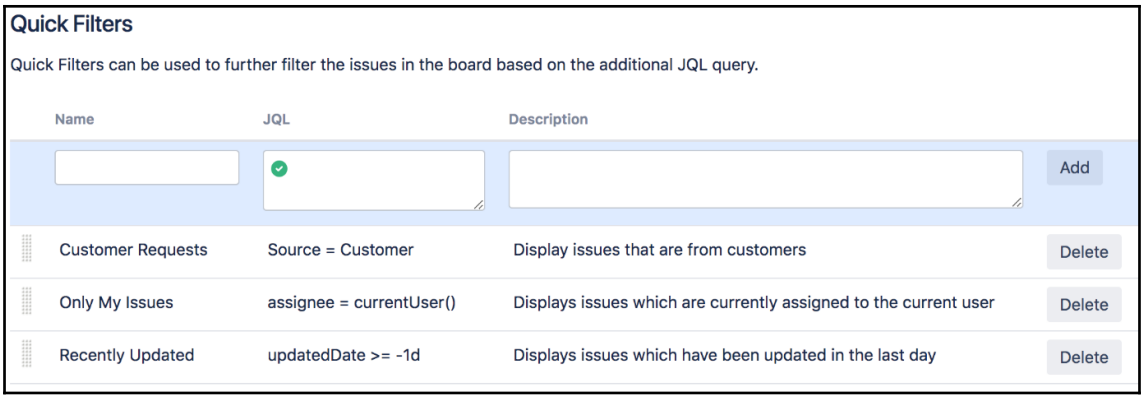

KANBAN board
Backlog
Board
QUICK FILTERS:
Only My Issues
Recently Updated
VERSIONS
EPICS
Selected for Development
MIN 3
MAX 10
4 issues
KANBAN-1 Kanban cards represent work items >> Click the "KANBAN-1" link at the top of this card to show the I
KANBAN-2 Kanban boards are often divided into streams of work, aka Swimlanes. By default, Kanban boards inc
KANBAN-7 ... so 2 work items violate the limit and cause the column to be highlighted
KANBAN-3 Add work items with "+ Create Issue" at the top right of the screen >> Try adding a new card now
Backlog
6 issues
KANBAN-5 Work items flow through different stages from left to right >> Try dragging this card to "Selected for Dev
KANBAN-4 Work items are ranked in priority order (from top to bottom) >> Try dragging this card over the card belo
KANBAN-6 Work In Progress (WIP) limits highlight delays. This column's limit is 1...
KANBAN-8 Filters at the top of the board allow you to quickly cut down the shown items >> Try clicking the "Recentl
KANBAN-9 As teams develop with Kanban they get better at reducing average resolution time (aka Cycle time). The
KANBAN-10 Instructions for deleting this sample board and project are in the description for this issue >> Click the "

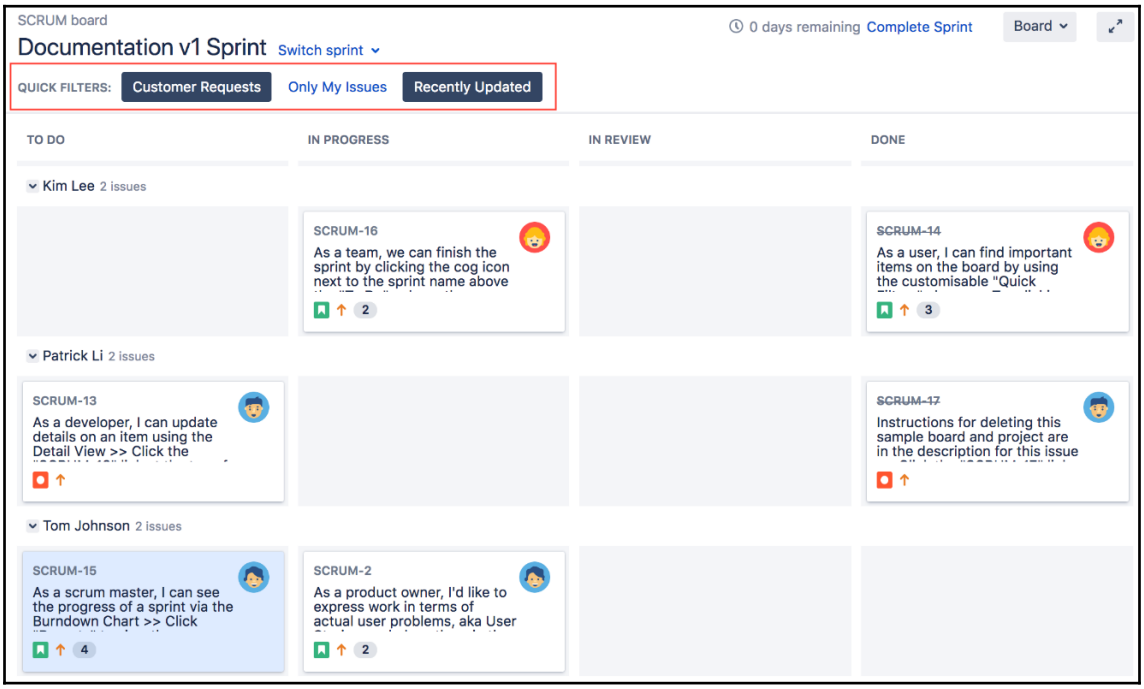

Configure SCRUM board
Back to board
Board
CONFIGURATION
General
Columns
Swimlanes
Quick Filters
Card colours
Card layout
Estimation
Working days
Issue Detail View
Column management
Columns can be added, removed, reordered and renamed. Columns are based upon global statuses and can be moved between columns. Minimum and maximum constraints can be set for each mapped column.
Add column
Name:*
In Review
Category:*
In Progress
Helps identify where an issue is in its lifecycle
Add
Cancel
on Jira board.
Project Administrators can add and
Add status
Add column
To Do
In Progress
Done
Unmapped Stat...
TO DO
19 issues
Set resolution
IN PROGRESS
10 issues
Set resolution
DONE
17 issues
Set resolution

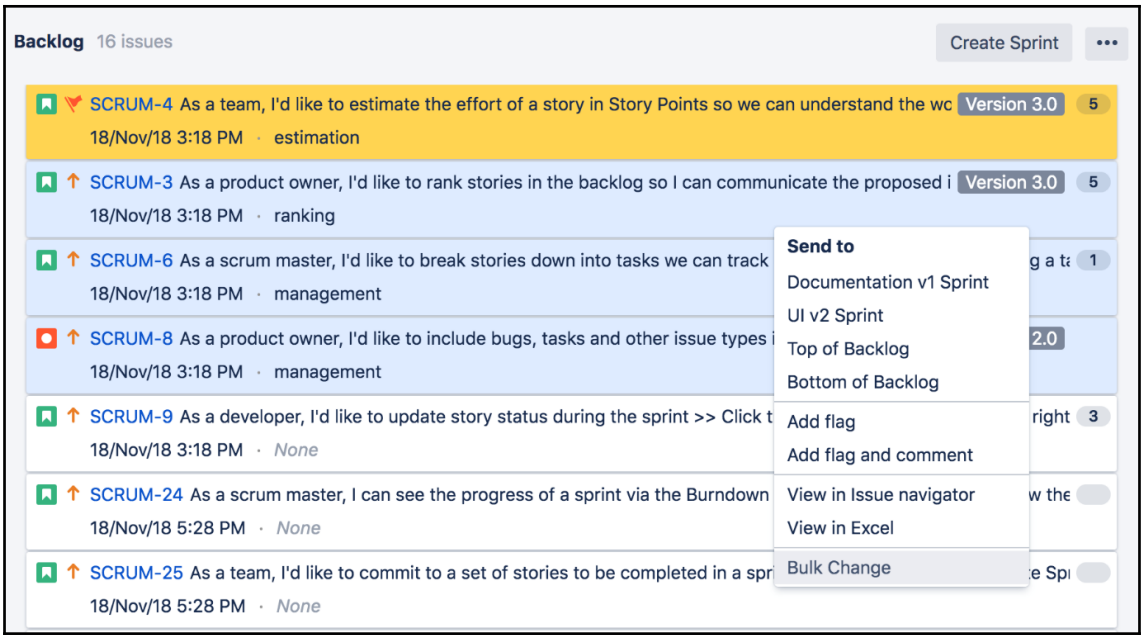

Column management
Columns can be added, removed, reordered and renamed. Columns are based upon global statuses and can be moved between columns. Minimum and maximum constraints can be set for each mapped column.
Column Constraint
Issue Count
Constraints can be added to columns on the board for one statistic.
Days in column
Shows dots representing the time an issue spent in a particular column on Jira board.
Simplified Workflow
Using Simplified Workflow
The workflow for project Kanban is currently managed by Jira Software. Project Administrators can add and remove statuses below.
Add status
Add column
Kanban backlog
Backlog
Selected for Dev...
In Progress
Done
No Min
No Max
3
10
No Min
5
No Min
15
Unmapped Stat...
BACKLOG
2 issues
Set resolution
SELECTED FOR DEV...
4 issues
Set resolution
IN PROGRESS
2 issues
Set resolution
DONE
8 issues
Set resolution

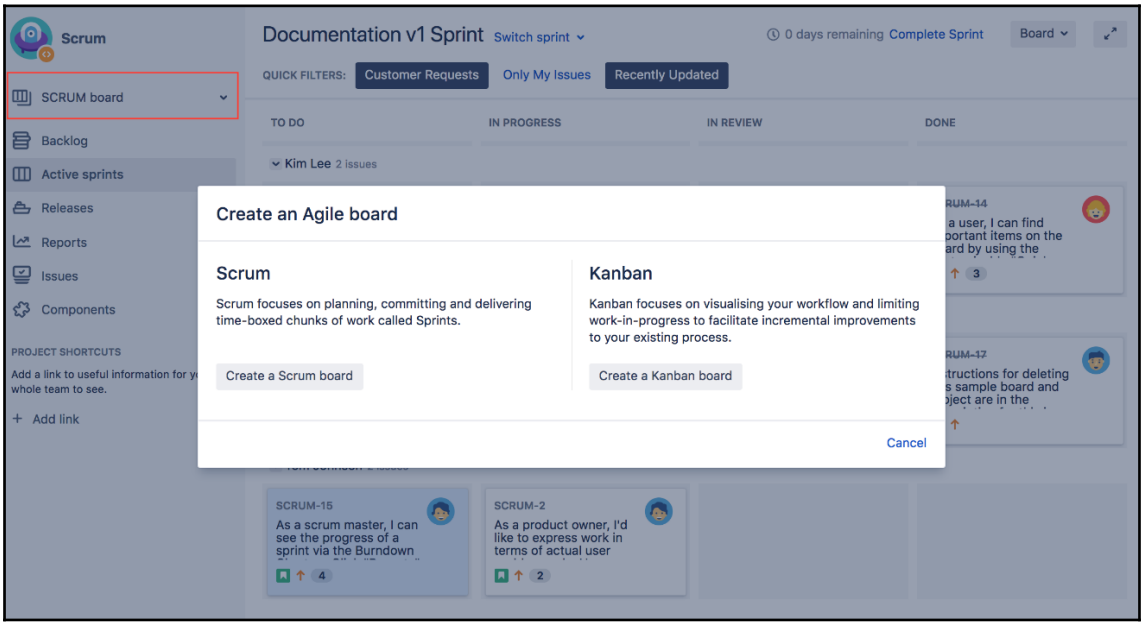

KANBAN board
Kanban board
Board
QUICK FILTERS: Only My Issues Recently Updated
BACKLOG 1
SELECTED FOR DEVELOPMENT 2
Min 3 Max 10
IN PROGRESS 6 Max 5
DONE 1 Max 15
Release...
Expedite 2 issues
KANBAN-2
Kanban boards are often divided into streams of work, aka Swimlanes. By default, Kanban
KANBAN-1
Kanban cards represent work items >> Click the "KANBAN-1" link at the top of this card to
Everything Else 8 issues
KANBAN-5
Work items flow through different stages from left to right >> Try dragging this card to
KANBAN-4
Work items are ranked in priority order (from top to bottom) >> Try dragging this card over the
KANBAN-7
... so 2 work items violate the limit and cause the column to be highlighted
KANBAN-10
Instructions for deleting this sample board and project are in the description for this issue >>
KANBAN-3
Add work items with "+ Create Issue" at the top right of the screen >> Try adding a new card
We're only showing recently modified issues.
Looking for an older issue?
KANBAN-6
Work In Progress (WIP) limits

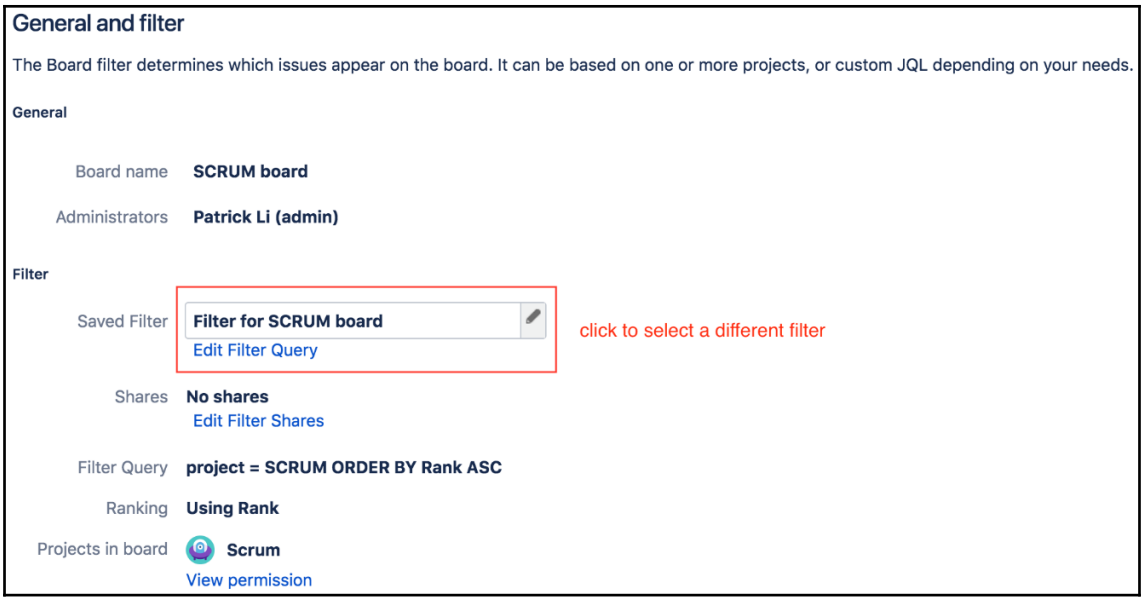

Swimlanes
A swimlane is a row on the board that can be used to group issues. Swimlane type can be changed below and will be saved automatically. Note: queries will not be lost when changing to another swimlane type.
Base Swimlanes on
Queries
Group issues by custom queries. Queries are based on JQL that is additional to the saved filter of this board.
Name
JQL
Description
Add
Customer Requests
Source = Customer
Requests from customer.
Delete
Internal Requests
Source = "Internal Review"
Delete
Everything Else


Quick Filters
Quick Filters can be used to further filter the issues in the board based on the additional JQL query.
Name
JQL
Description
Add
Customer Requests
Source = Customer
Display issues that are from customers
Delete
Only My Issues
assignee = currentUser()
Displays issues which are currently assigned to the current user
Delete
Recently Updated
updatedDate >= -1d
Displays issues which have been updated in the last day
Delete

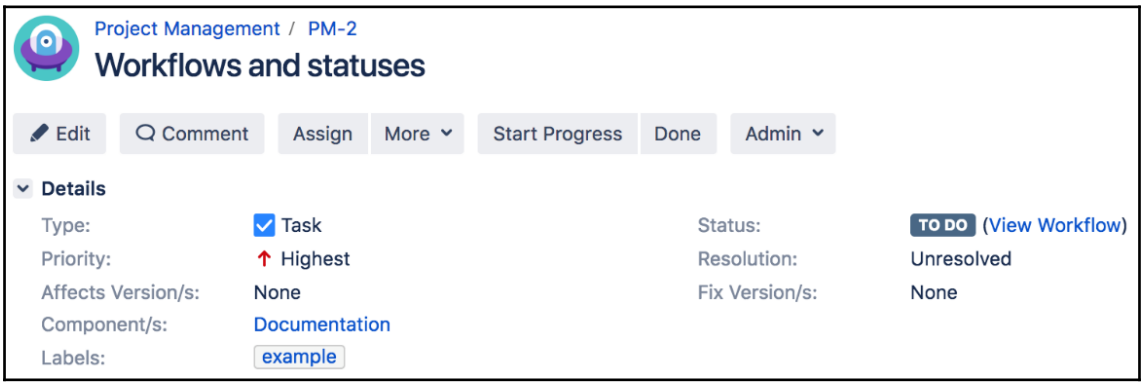

SCRUM board
Documentation v1 Sprint
Switch sprint
0 days remaining
Complete Sprint
Board
QUICK FILTERS:
Customer Requests
Only My Issues
Recently Updated
TO DO
IN PROGRESS
IN REVIEW
DONE
Kim Lee 2 issues
SCRUM-16
As a team, we can finish the sprint by clicking the cog icon next to the sprint name above
SCRUM-14
As a user, I can find important items on the board by using the customisable "Quick
Patrick Li 2 issues
SCRUM-13
As a developer, I can update details on an item using the Detail View >> Click the
SCRUM-17
Instructions for deleting this sample board and project are in the description for this issue
Tom Johnson 2 issues
SCRUM-15
As a scrum master, I can see the progress of a sprint via the Burndown Chart >> Click
SCRUM-2
As a product owner, I'd like to express work in terms of actual user problems, aka User

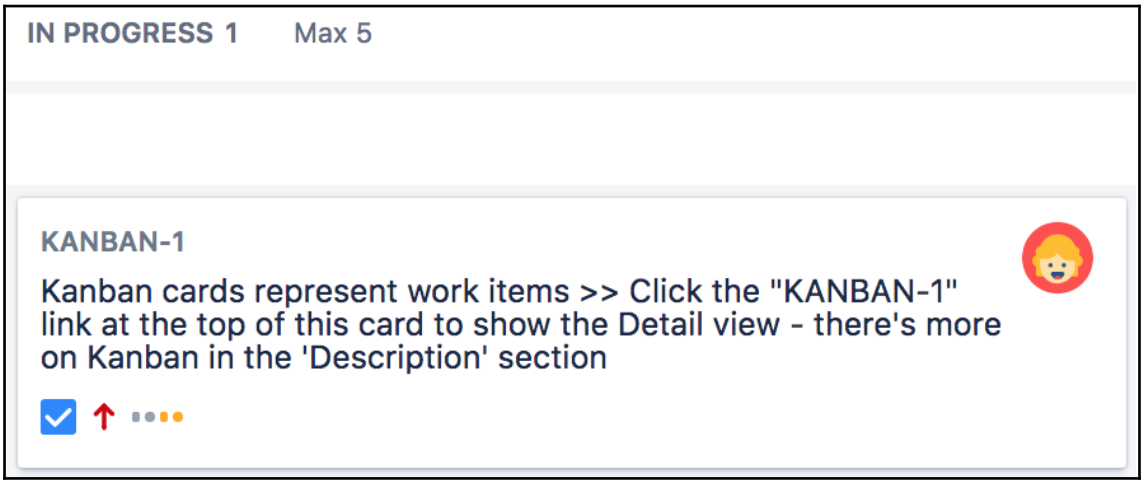

Backlog 16 issues
Create Sprint
SCRUM-4 As a team, I'd like to estimate the effort of a story in Story Points so we can understand the wc
Version 3.0
5
18/Nov/18 3:18 PM · estimation
SCRUM-3 As a product owner, I'd like to rank stories in the backlog so I can communicate the proposed i
Version 3.0
5
18/Nov/18 3:18 PM · ranking
SCRUM-6 As a scrum master, I'd like to break stories down into tasks we can track
1
18/Nov/18 3:18 PM · management
SCRUM-8 As a product owner, I'd like to include bugs, tasks and other issue types
2.0
18/Nov/18 3:18 PM · management
SCRUM-9 As a developer, I'd like to update story status during the sprint >> Click t
3
18/Nov/18 3:18 PM · None
SCRUM-24 As a scrum master, I can see the progress of a sprint via the Burndown
18/Nov/18 5:28 PM · None
SCRUM-25 As a team, I'd like to commit to a set of stories to be completed in a spr
18/Nov/18 5:28 PM · None
Send to
Documentation v1 Sprint
UI v2 Sprint
Top of Backlog
Bottom of Backlog
Add flag
Add flag and comment
View in Issue navigator
View in Excel
Bulk Change

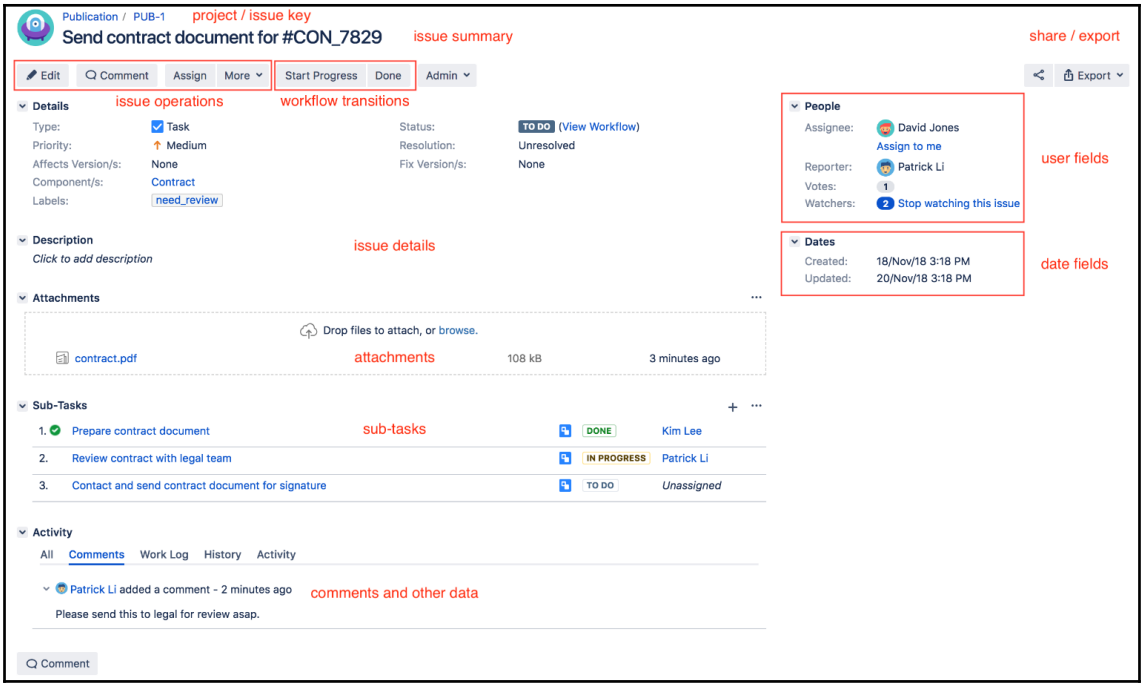

Scrum
SCRUM board
Backlog
Active sprints
Releases
Reports
Issues
Components
PROJECT SHORTCUTS
Add a link to useful information for y
whole team to see.
Add link
Documentation v1 Sprint
Switch sprint
0 days remaining
Complete Sprint
Board
QUICK FILTERS:
Customer Requests
Only My Issues
Recently Updated
TO DO
IN PROGRESS
IN REVIEW
DONE
Kim Lee 2 issues
Create an Agile board
Scrum
Scrum focuses on planning, committing and delivering time-boxed chunks of work called Sprints.
Create a Scrum board
Kanban
Kanban focuses on visualising your workflow and limiting work-in-progress to facilitate incremental improvements to your existing process.
Create a Kanban board
Cancel
SCRUM-15
As a scrum master, I can see the progress of a sprint via the Burndown
SCRUM-2
As a product owner, I'd like to express work in terms of actual user

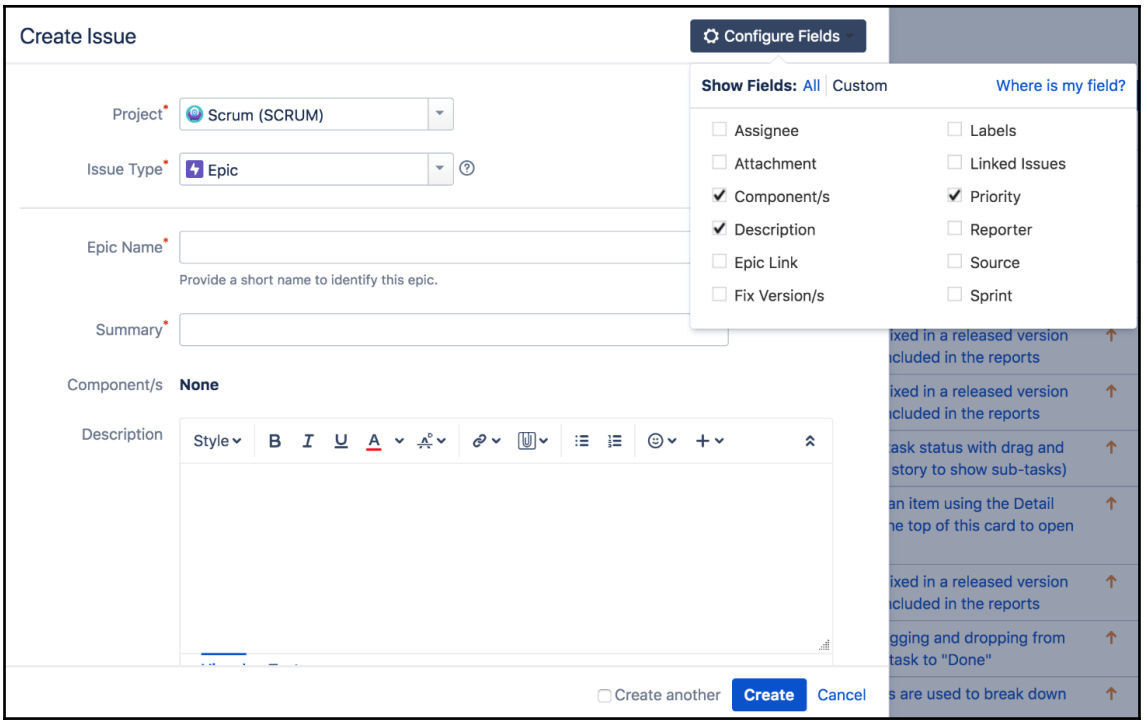

General and filter
The Board filter determines which issues appear on the board. It can be based on one or more projects, or custom JQL depending on your needs.
General
Board name
SCRUM board
Administrators
Patrick Li (admin)
Filter
Saved Filter
Filter for SCRUM board
Edit Filter Query
click to select a different filter
Shares
No shares
Edit Filter Shares
Filter Query
project = SCRUM ORDER BY Rank ASC
Ranking
Using Rank
Projects in board
Scrum
View permission

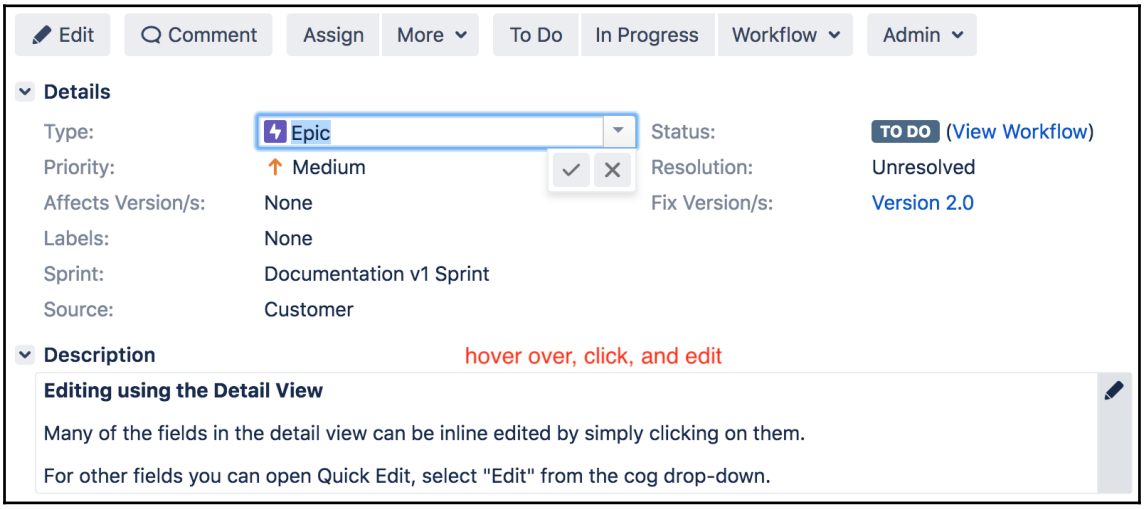
Chapter 4: Issue Management

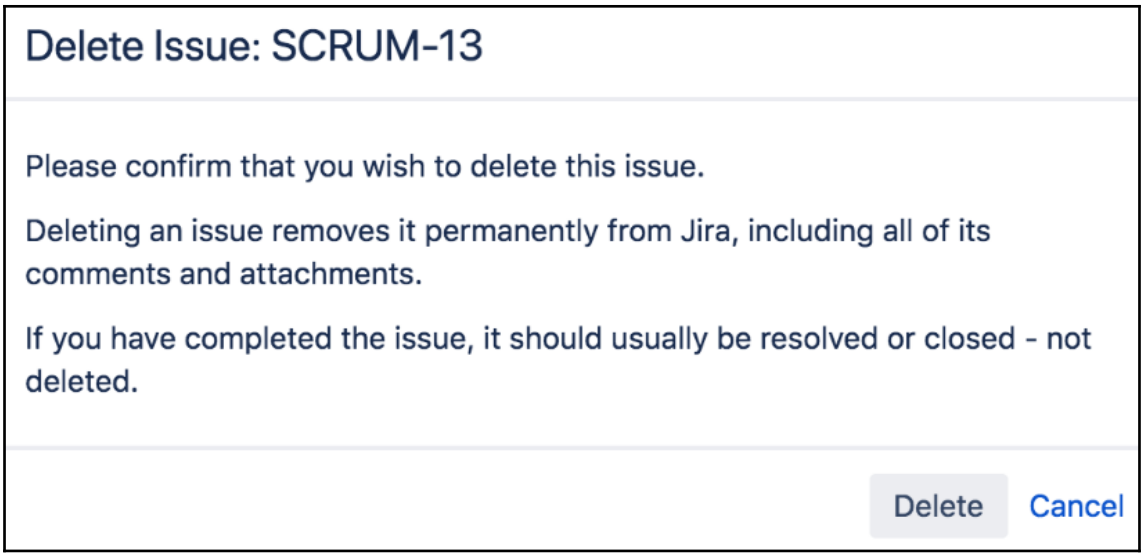




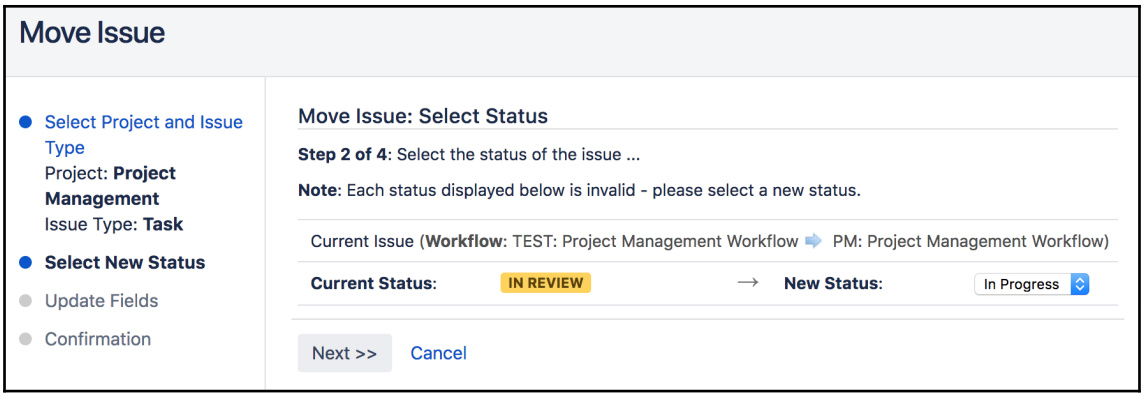

Publication / PUB-1
project / issue key
Send contract document for #CON_7829
issue summary
share / export
Edit
Comment
Assign
More
Start Progress
Done
Admin
Export
issue operations
workflow transitions
Details
Type: Task
Priority: Medium
Affects Version/s: None
Component/s: Contract
Labels: need_review
Status: TO DO (View Workflow)
Resolution: Unresolved
Fix Version/s: None
People
Assignee: David Jones
Assign to me
Reporter: Patrick Li
Votes: 1
Watchers: 2 Stop watching this issue
user fields
Description
Click to add description
issue details
Dates
Created: 18/Nov/18 3:18 PM
Updated: 20/Nov/18 3:18 PM
date fields
Attachments
Drop files to attach, or browse.
contract.pdf
attachments
108 kB
3 minutes ago
Sub-Tasks
1. Prepare contract document
sub-tasks
DONE
Kim Lee
2. Review contract with legal team
IN PROGRESS
Patrick Li
3. Contact and send contract document for signature
TO DO
Unassigned
Activity
All
Comments
Work Log
History
Activity
Patrick Li added a comment - 2 minutes ago
comments and other data
Please send this to legal for review asap.
Comment

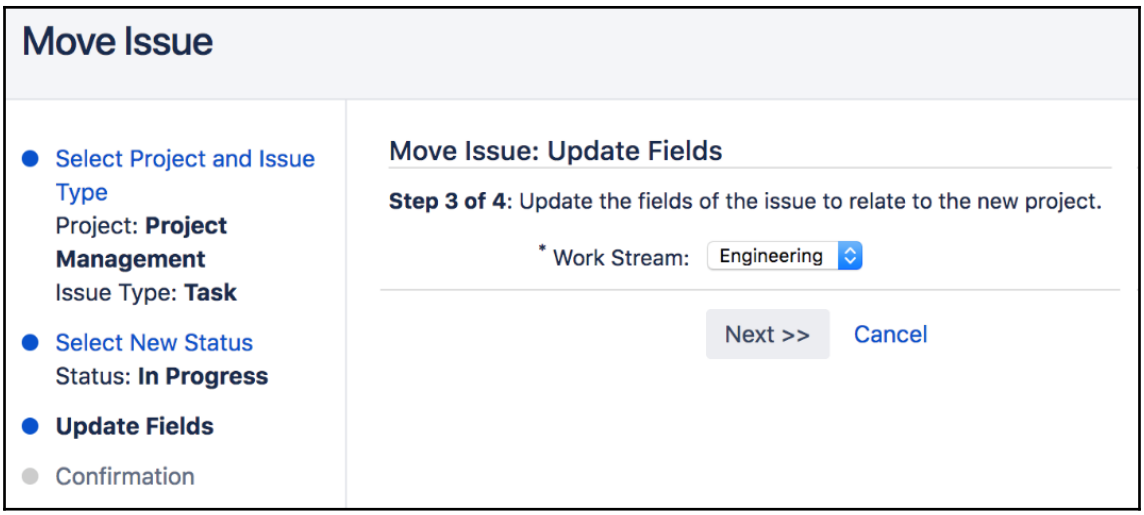

Create Issue
Configure Fields
Show Fields: All | Custom
Where is my field?
Assignee
Labels
Attachment
Linked Issues
Component/s
Priority
Description
Reporter
Epic Link
Source
Fix Version/s
Sprint
Project*
Scrum (SCRUM)
Issue Type*
Epic
Epic Name*
Provide a short name to identify this epic.
Summary*
Component/s
None
Description
Style
Create another
Create
Cancel

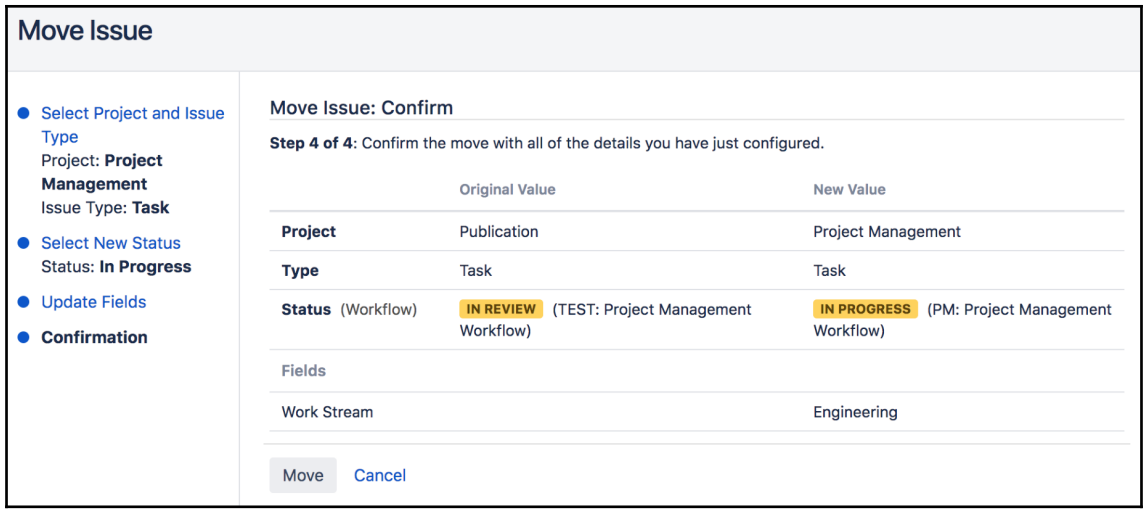

Edit
Comment
Assign
More
To Do
In Progress
Workflow
Admin
Details
Type:
Epic
Priority:
Medium
Affects Version/s:
None
Labels:
None
Sprint:
Documentation v1 Sprint
Source:
Customer
Status:
TO DO
(View Workflow)
Resolution:
Unresolved
Fix Version/s:
Version 2.0
Description
hover over, click, and edit
Editing using the Detail View
Many of the fields in the detail view can be inline edited by simply clicking on them.
For other fields you can open Quick Edit, select "Edit" from the cog drop-down.

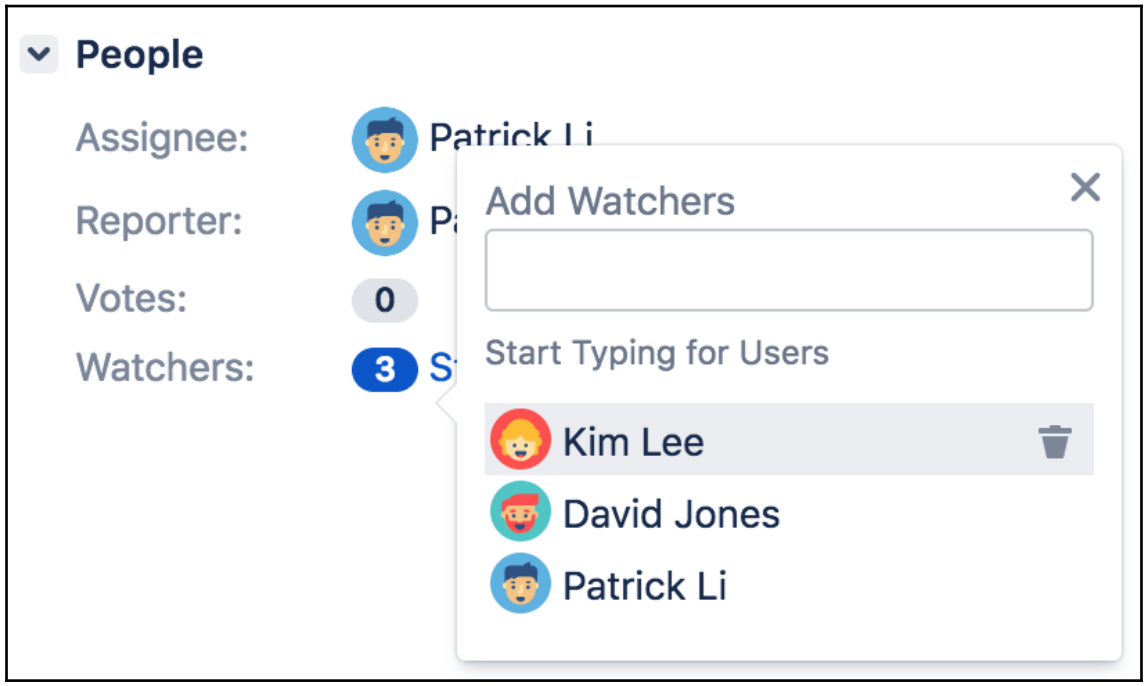

Delete Issue: SCRUM-13
Please confirm that you wish to delete this issue.
Deleting an issue removes it permanently from Jira, including all of its comments and attachments.
If you have completed the issue, it should usually be resolved or closed - not deleted.
Delete
Cancel

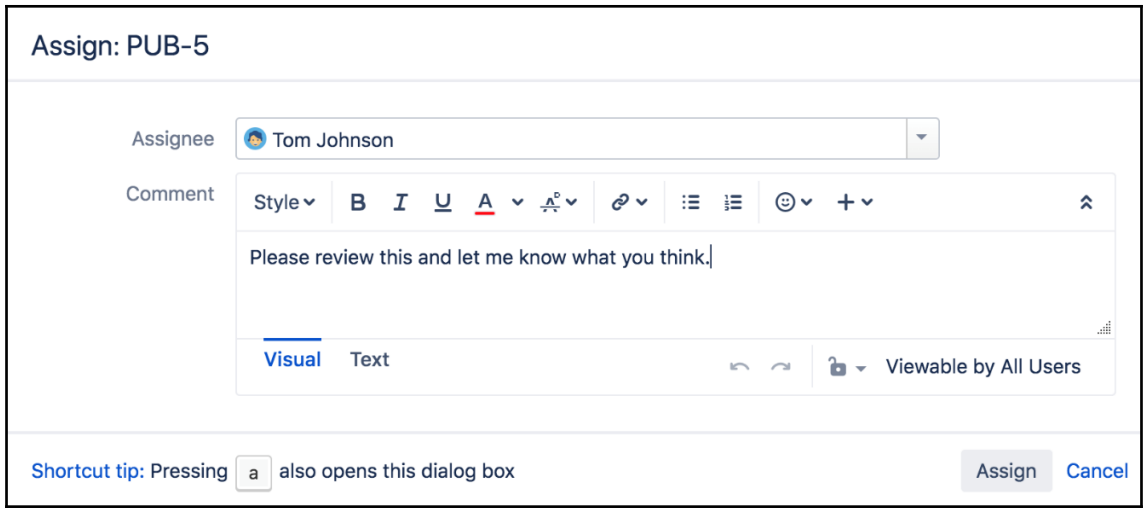
Move Issue
Select Project and Issue Type
Select New Status
Update Fields
Confirmation
Move Issue: PUB-5 - Review publication guideline
Step 1 of 4: Choose the project and issue type to move to ...
Select Project
Current Project: Publication
New Project: Project Management (PM)
Select Issue Type
Current Issue Type: Task
New Issue Type: Task
Next >>
Cancel

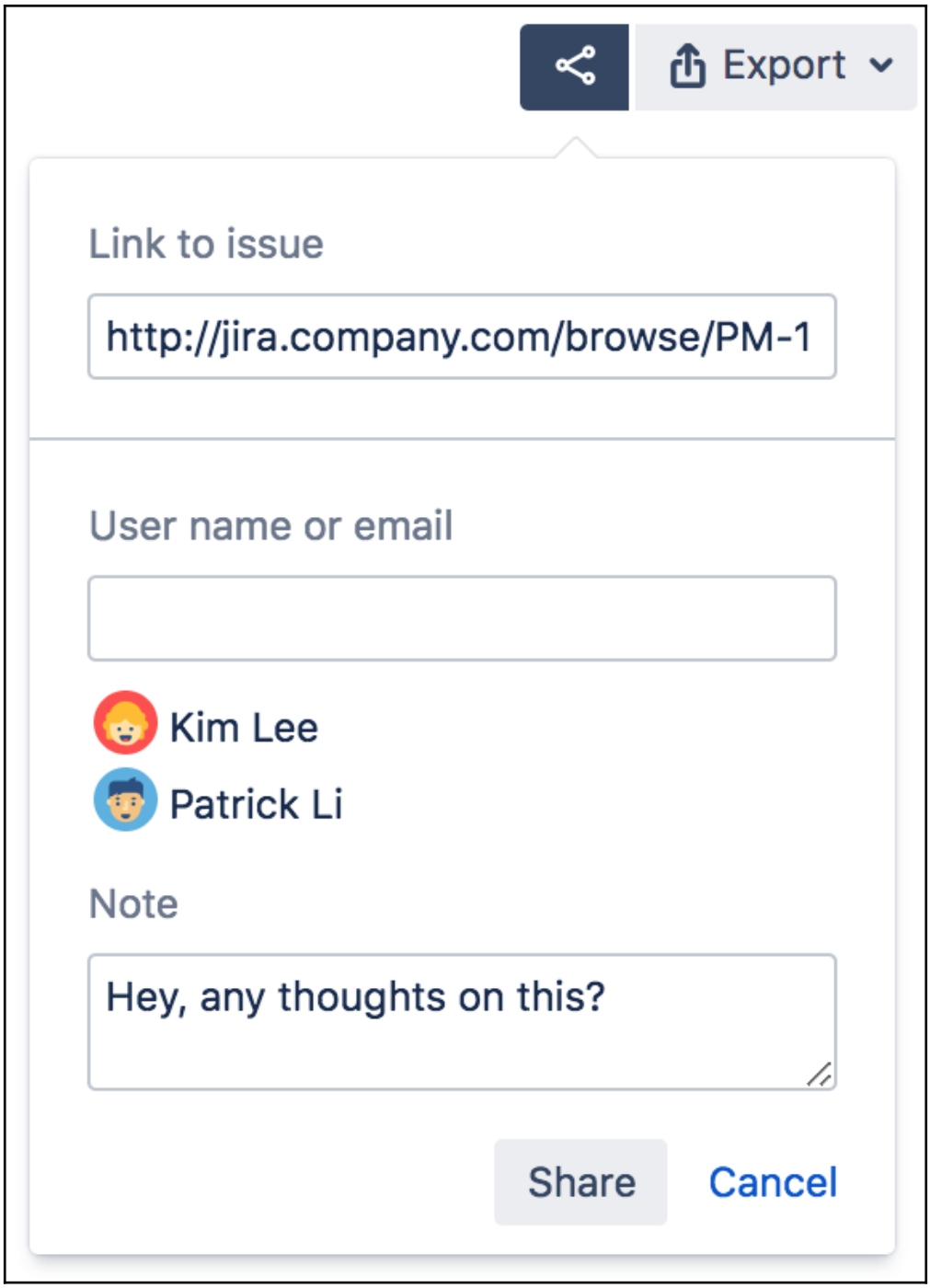

Move Issue
Select Project and Issue Type
Project: Project Management
Issue Type: Task
Select New Status
Update Fields
Confirmation
Move Issue: Select Status
Step 2 of 4: Select the status of the issue ...
Note: Each status displayed below is invalid - please select a new status.
Current Issue (Workflow: TEST: Project Management Workflow PM: Project Management Workflow)
Current Status: IN REVIEW
New Status: In Progress
Next >>
Cancel

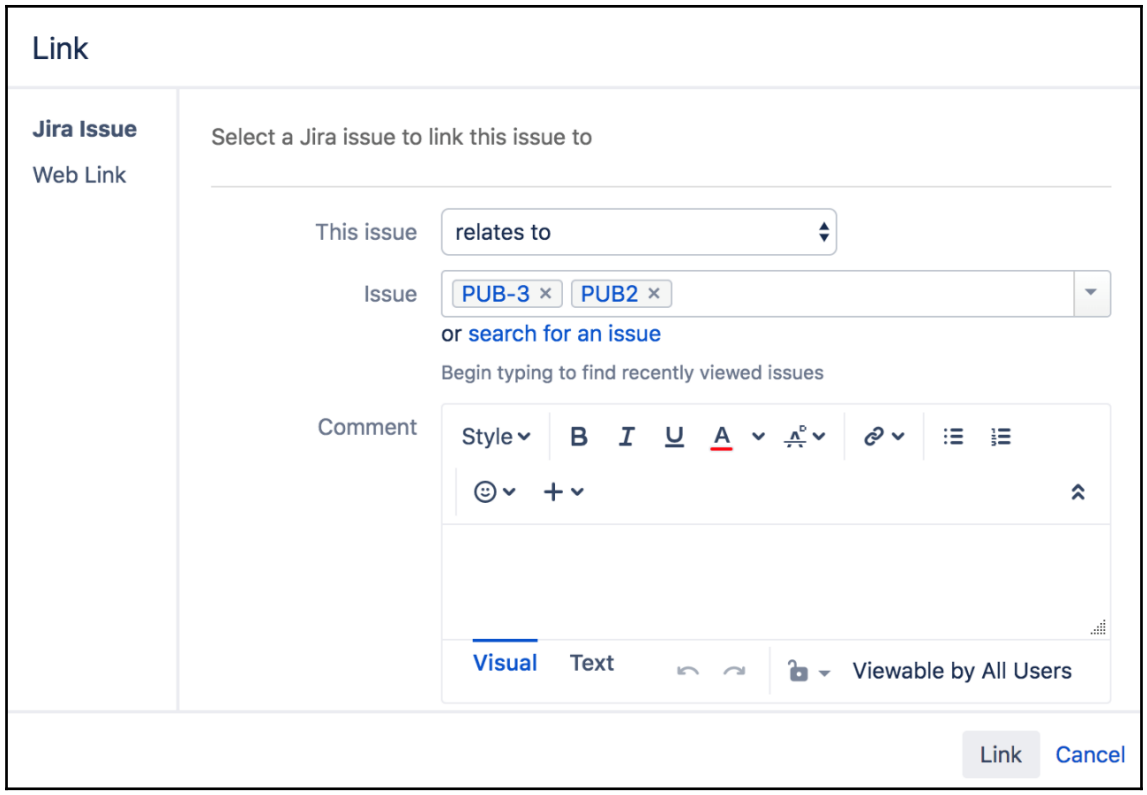

Move Issue
Select Project and Issue Type
Project: Project Management
Issue Type: Task
Select New Status
Status: In Progress
Update Fields
Confirmation
Move Issue: Update Fields
Step 3 of 4: Update the fields of the issue to relate to the new project.
* Work Stream: Engineering
Next >>
Cancel

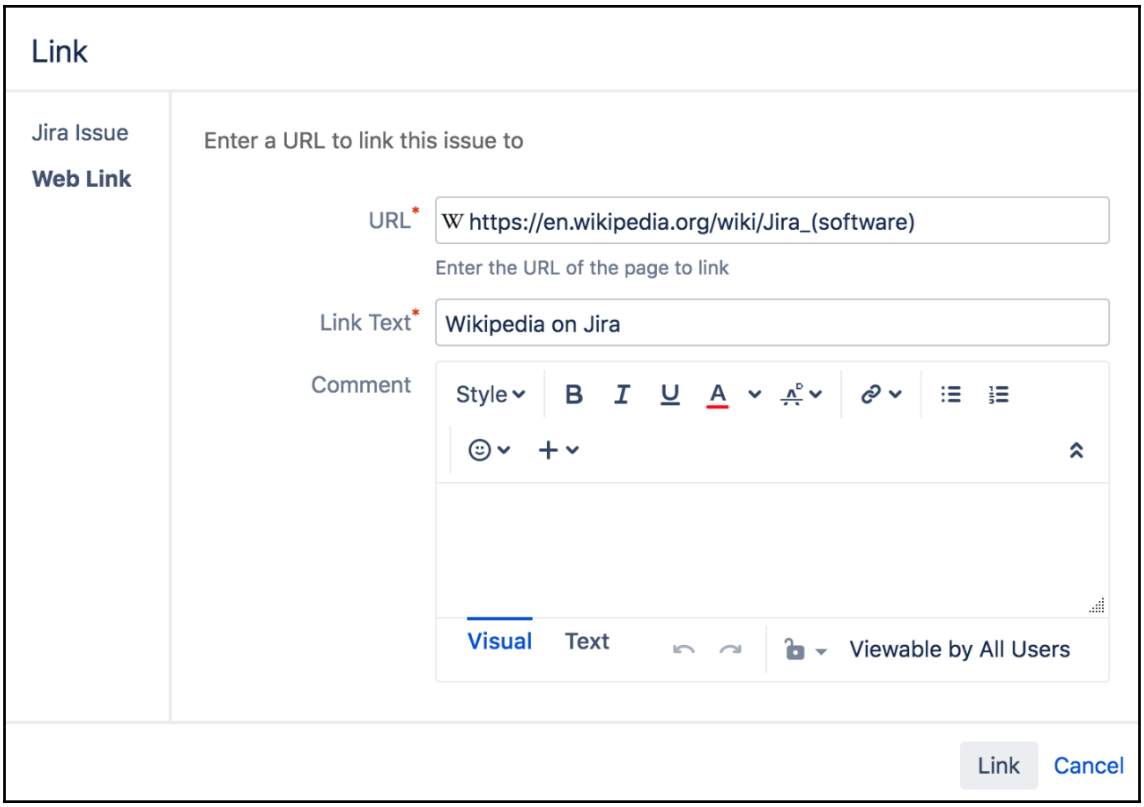

Move Issue
Select Project and Issue Type
Project: Project Management
Issue Type: Task
Select New Status
Status: In Progress
Update Fields
Confirmation
Move Issue: Confirm
Step 4 of 4: Confirm the move with all of the details you have just configured.
Original Value
New Value
Project
Publication
Project Management
Type
Task
Task
Status (Workflow)
IN REVIEW (TEST: Project Management Workflow)
IN PROGRESS (PM: Project Management Workflow)
Fields
Work Stream
Engineering
Move
Cancel

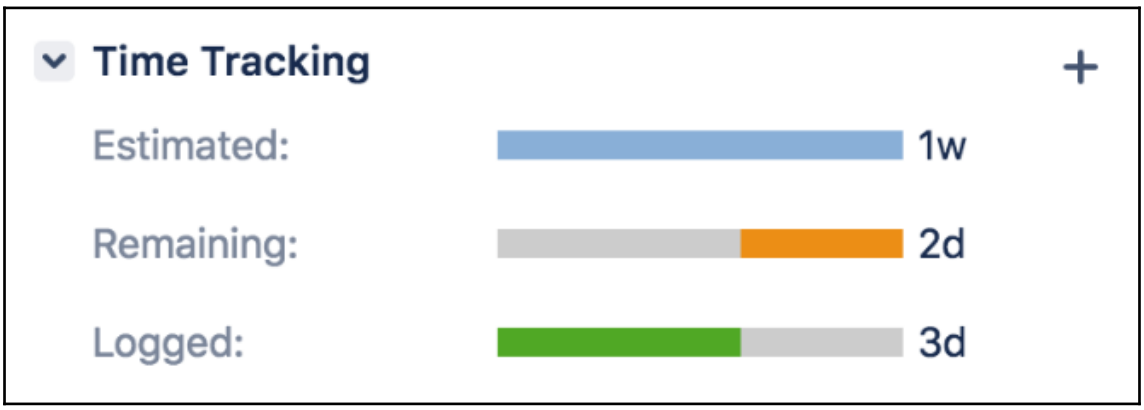

People
Assignee:
Reporter:
Votes:
0
Watchers:
3
Add Watchers
Start Typing for Users
Kim Lee
David Jones
Patrick Li

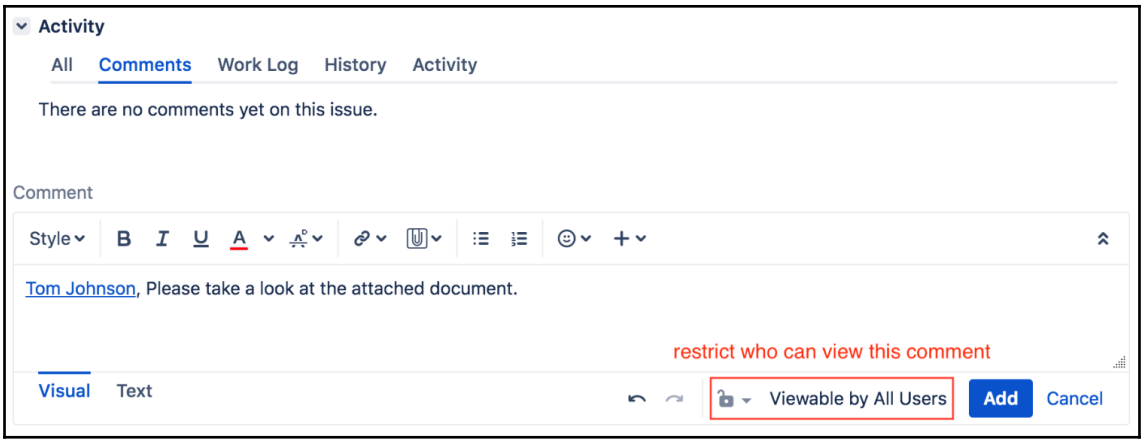

Assign: PUB-5
Assignee
Tom Johnson
Comment
Style
Please review this and let me know what you think.
Visual
Text
Viewable by All Users
Shortcut tip: Pressing a also opens this dialog box
Assign
Cancel

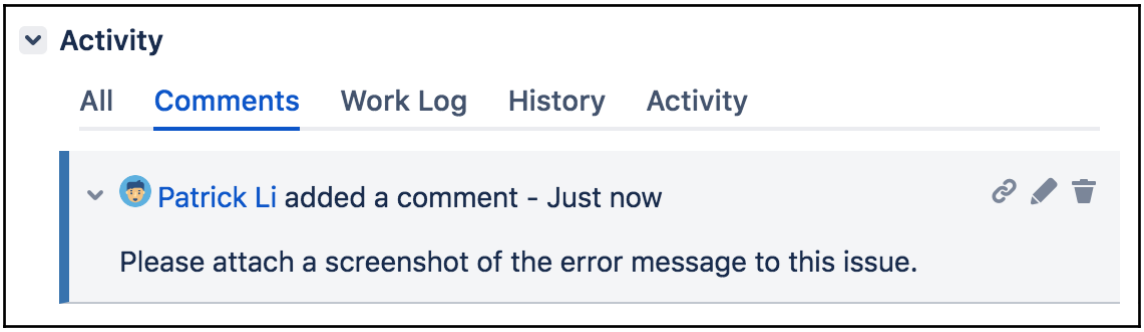

Export
Link to issue
http://jira.company.com/browse/PM-1
User name or email
Kim Lee
Patrick Li
Note
Hey, any thoughts on this?
Share
Cancel

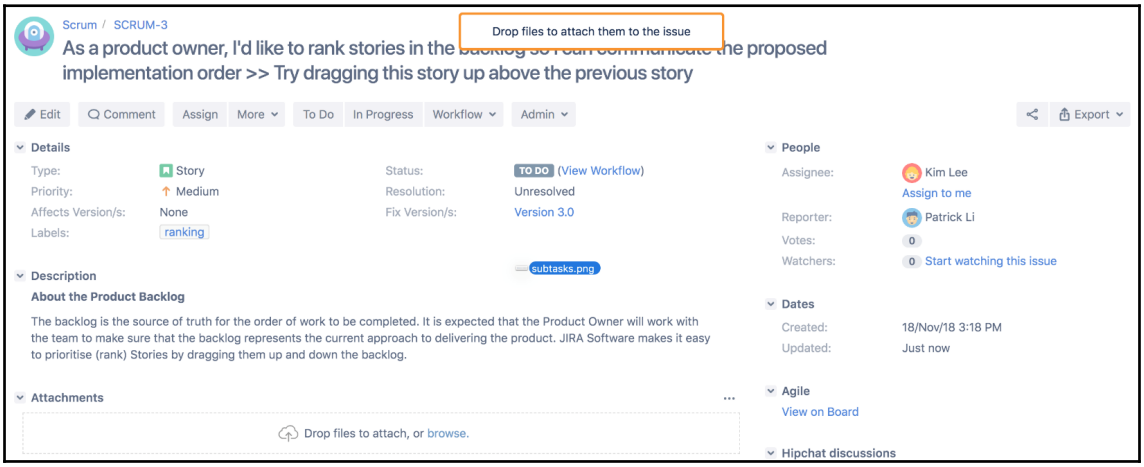

Link
Jira Issue
Web Link
Select a Jira issue to link this issue to
This issue
relates to
Issue
PUB-3 ×
PUB2 ×
or search for an issue
Begin typing to find recently viewed issues
Comment
Style
Visual
Text
Viewable by All Users
Link
Cancel

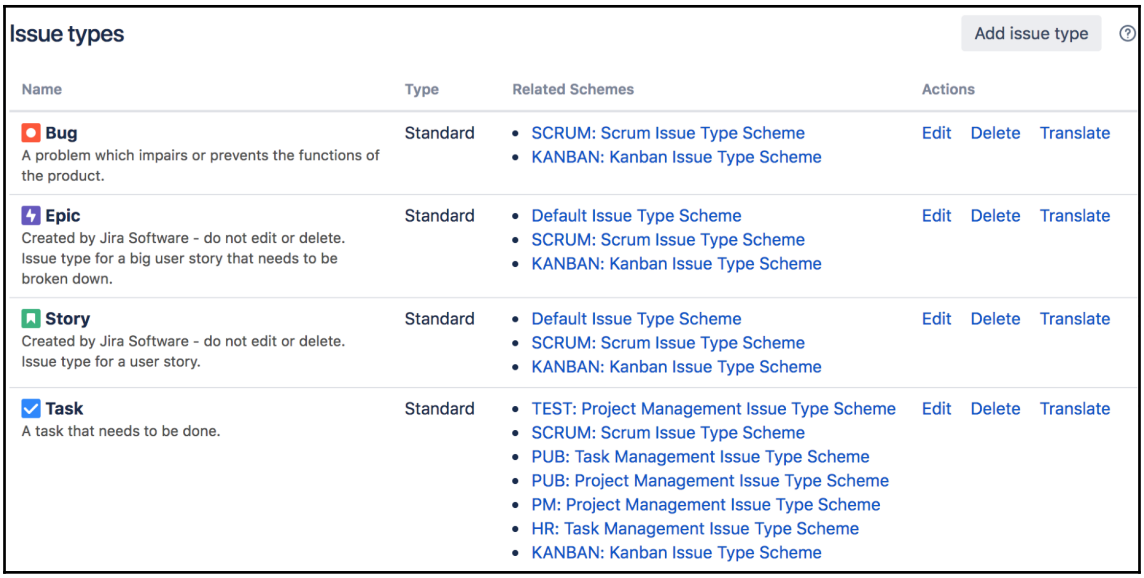

Link
Jira Issue
Web Link
Enter a URL to link this issue to
URL*
https://en.wikipedia.org/wiki/Jira_(software)
Enter the URL of the page to link
Link Text*
Wikipedia on Jira
Comment
Style
Visual
Text
Viewable by All Users
Link
Cancel

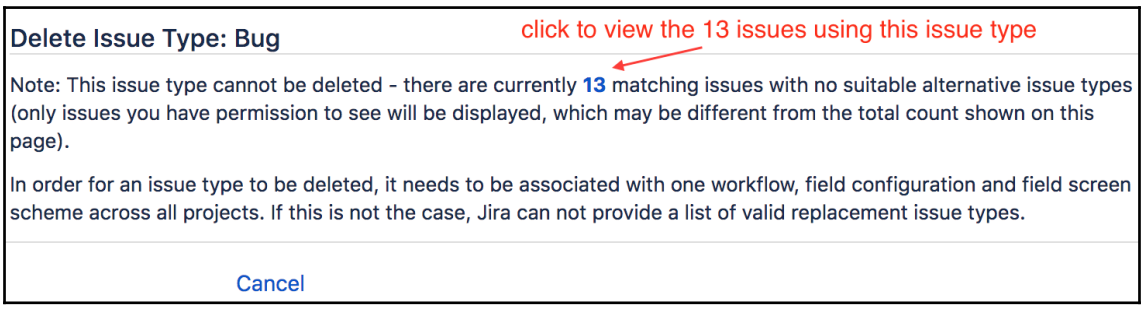

Time Tracking
Estimated:
1w
Remaining:
2d
Logged:
3d


Activity
All
Comments
Work Log
History
Activity
There are no comments yet on this issue.
Comment
Style
Tom Johnson, Please take a look at the attached document.
restrict who can view this comment
Visual
Text
Viewable by All Users
Add
Cancel

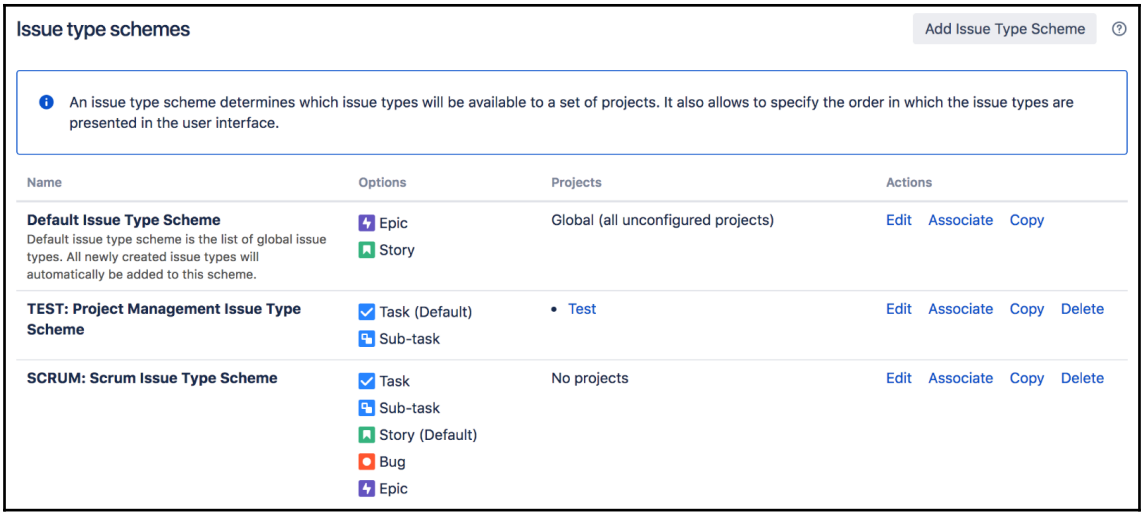

Activity
All
Comments
Work Log
History
Activity
Patrick Li added a comment - Just now
Please attach a screenshot of the error message to this issue.

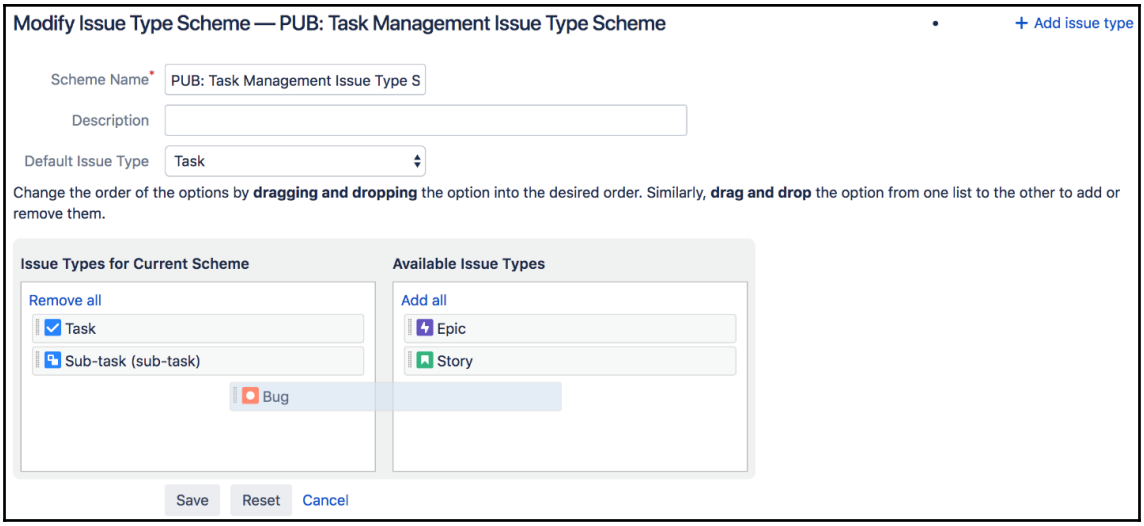

Scrum / SCRUM-3
Drop files to attach them to the issue
As a product owner, I'd like to rank stories in the backlog so I can communicate the proposed implementation order >> Try dragging this story up above the previous story
Edit
Comment
Assign
More
To Do
In Progress
Workflow
Admin
Export
Details
Type: Story
Priority: Medium
Affects Version/s: None
Labels: ranking
Status: TO DO (View Workflow)
Resolution: Unresolved
Fix Version/s: Version 3.0
subtasks.png
Description
About the Product Backlog
The backlog is the source of truth for the order of work to be completed. It is expected that the Product Owner will work with the team to make sure that the backlog represents the current approach to delivering the product. JIRA Software makes it easy to prioritise (rank) Stories by dragging them up and down the backlog.
Attachments
Drop files to attach, or browse.
People
Assignee: Kim Lee
Assign to me
Reporter: Patrick Li
Votes: 0
Watchers: 0 Start watching this issue
Dates
Created: 18/Nov/18 3:18 PM
Updated: Just now
Agile
View on Board
Hipchat discussions

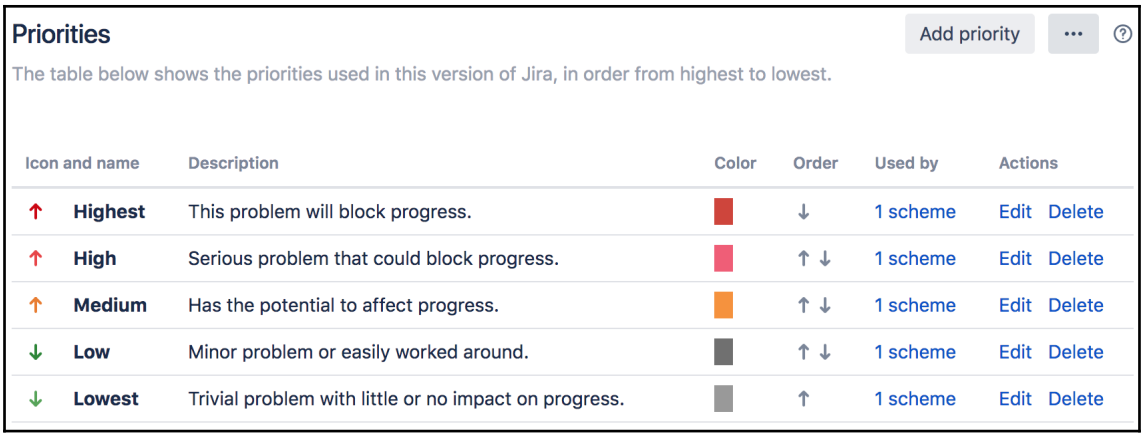

Issue types
Add issue type
Name
Type
Related Schemes
Actions
Bug
A problem which impairs or prevents the functions of the product.
Standard
SCRUM: Scrum Issue Type Scheme
KANBAN: Kanban Issue Type Scheme
Edit Delete Translate
Epic
Created by Jira Software - do not edit or delete. Issue type for a big user story that needs to be broken down.
Standard
Default Issue Type Scheme
SCRUM: Scrum Issue Type Scheme
KANBAN: Kanban Issue Type Scheme
Edit Delete Translate
Story
Created by Jira Software - do not edit or delete. Issue type for a user story.
Standard
Default Issue Type Scheme
SCRUM: Scrum Issue Type Scheme
KANBAN: Kanban Issue Type Scheme
Edit Delete Translate
Task
A task that needs to be done.
Standard
TEST: Project Management Issue Type Scheme
SCRUM: Scrum Issue Type Scheme
PUB: Task Management Issue Type Scheme
PUB: Project Management Issue Type Scheme
PM: Project Management Issue Type Scheme
HR: Task Management Issue Type Scheme
KANBAN: Kanban Issue Type Scheme
Edit Delete Translate

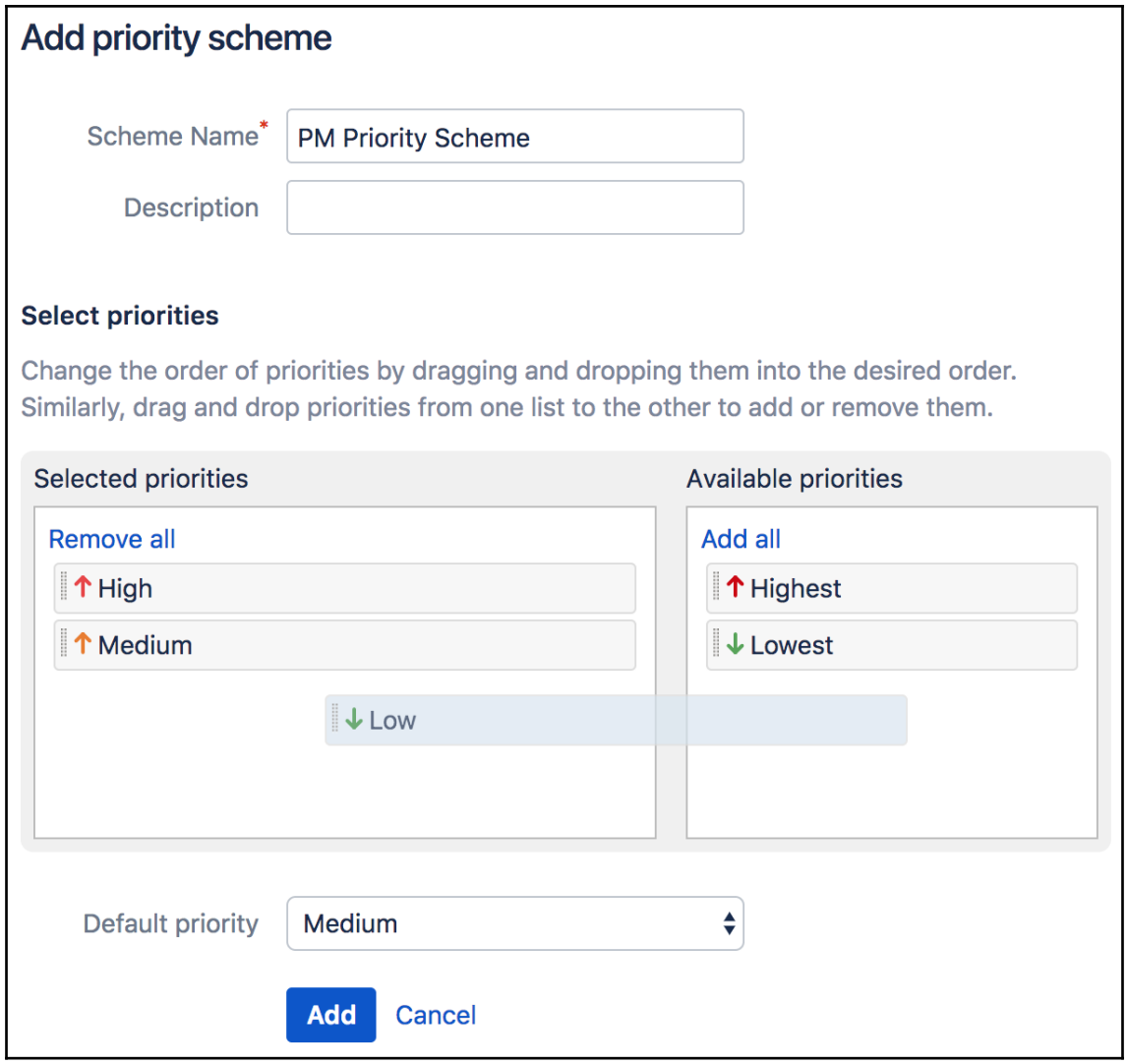

Delete Issue Type: Bug
click to view the 13 issues using this issue type
Note: This issue type cannot be deleted - there are currently 13 matching issues with no suitable alternative issue types (only issues you have permission to see will be displayed, which may be different from the total count shown on this page).
In order for an issue type to be deleted, it needs to be associated with one workflow, field configuration and field screen scheme across all projects. If this is not the case, Jira can not provide a list of valid replacement issue types.
Cancel

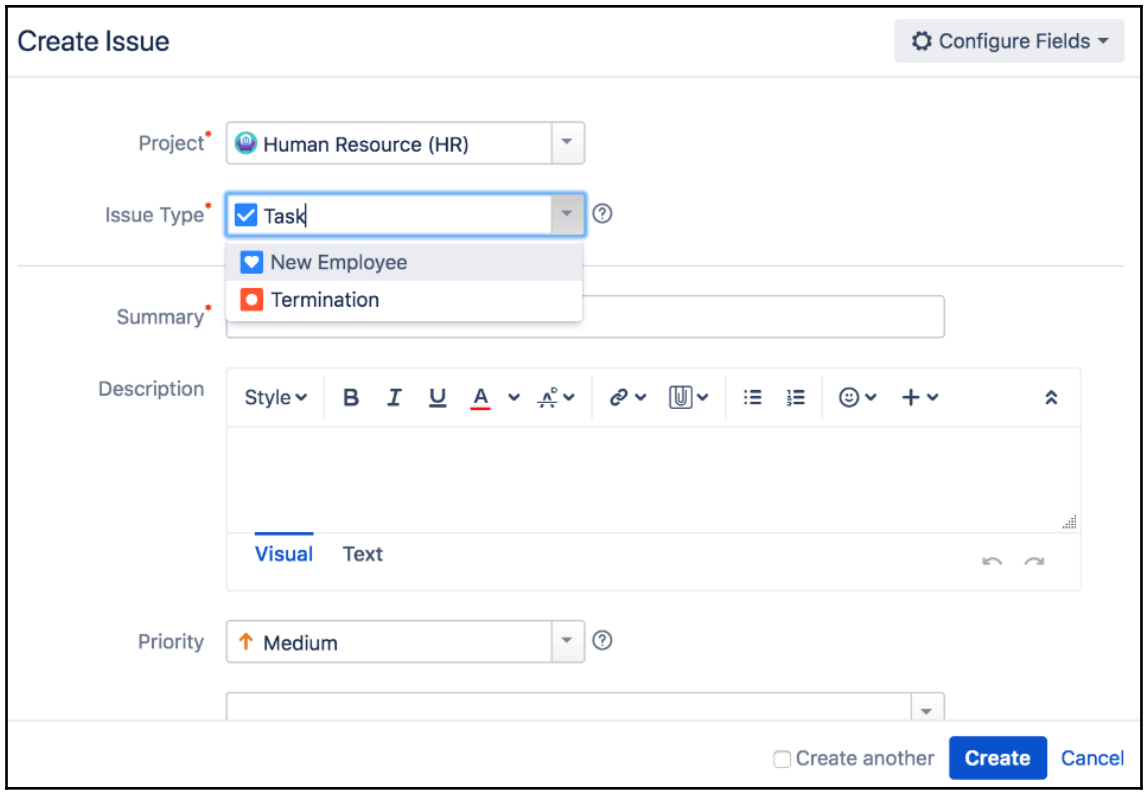
Sub-Tasks
1. Prepare contract document
DONE
Kim Lee
2. Review contract with legal team
IN PROGRESS
Patrick Li
3. Contact and send contract document for signature
TO DO
Unassigned


Issue type schemes
Add Issue Type Scheme
An issue type scheme determines which issue types will be available to a set of projects. It also allows to specify the order in which the issue types are presented in the user interface.
Name
Options
Projects
Actions
Default Issue Type Scheme
Default issue type scheme is the list of global issue types. All newly created issue types will automatically be added to this scheme.
Epic
Story
Global (all unconfigured projects)
Edit Associate Copy
TEST: Project Management Issue Type Scheme
Task (Default)
Sub-task
Test
Edit Associate Copy Delete
SCRUM: Scrum Issue Type Scheme
Task
Sub-task
Story (Default)
Bug
Epic
No projects
Edit Associate Copy Delete

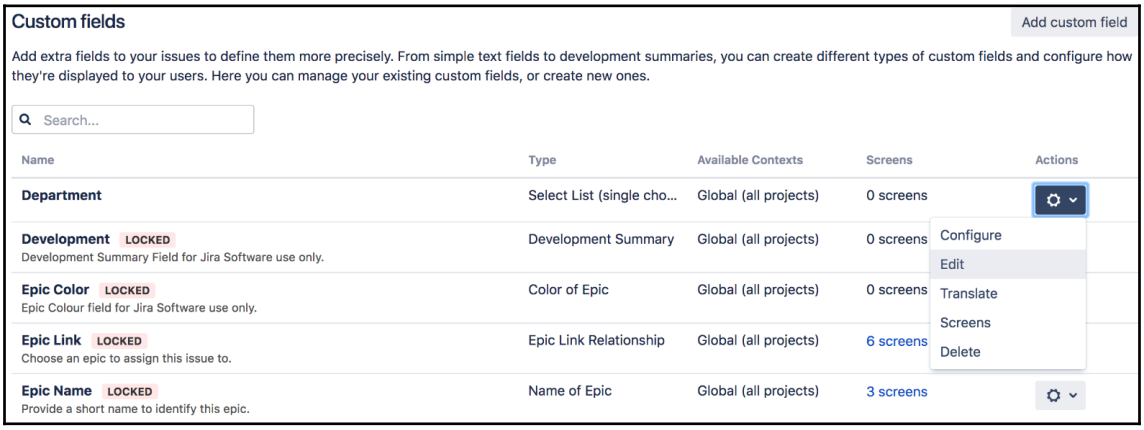

Modify Issue Type Scheme — PUB: Task Management Issue Type Scheme
Add issue type
Scheme Name*
PUB: Task Management Issue Type S
Description
Default Issue Type
Task
Change the order of the options by dragging and dropping the option into the desired order. Similarly, drag and drop the option from one list to the other to add or remove them.
Issue Types for Current Scheme
Remove all
Task
Sub-task (sub-task)
Bug
Available Issue Types
Add all
Epic
Story
Save
Reset
Cancel

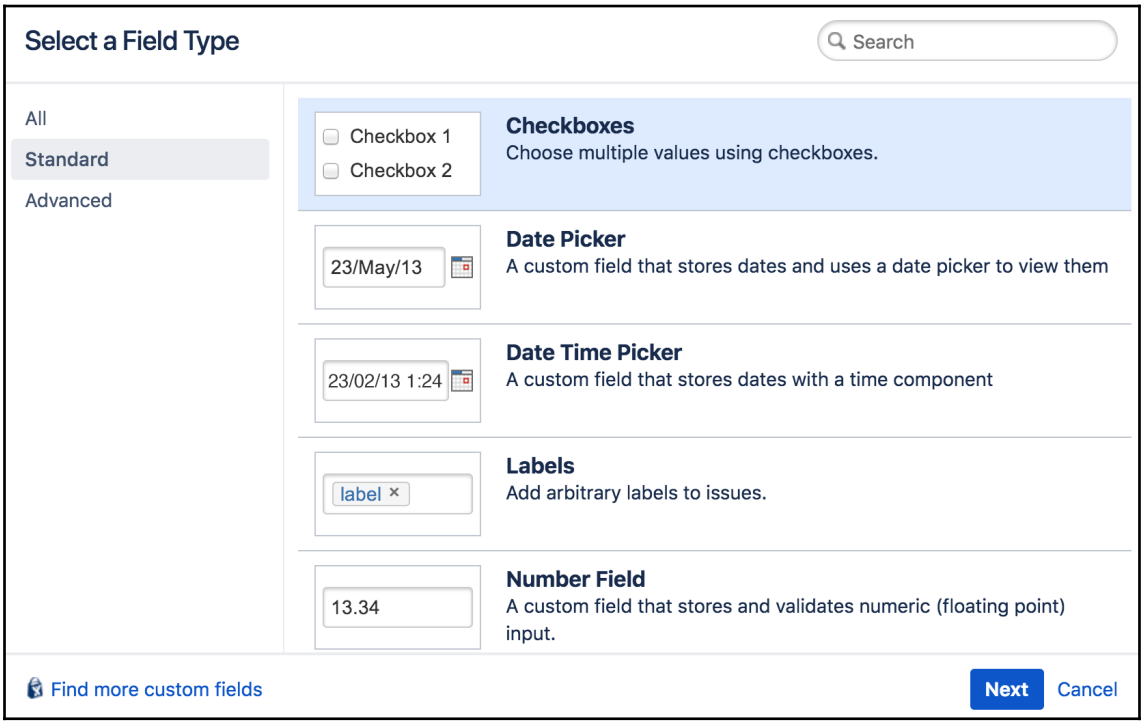

Priorities
Add priority
The table below shows the priorities used in this version of Jira, in order from highest to lowest.
Icon and name
Description
Color
Order
Used by
Actions
Highest
This problem will block progress.
1 scheme
Edit
Delete
High
Serious problem that could block progress.
1 scheme
Edit
Delete
Medium
Has the potential to affect progress.
1 scheme
Edit
Delete
Low
Minor problem or easily worked around.
1 scheme
Edit
Delete
Lowest
Trivial problem with little or no impact on progress.
1 scheme
Edit
Delete

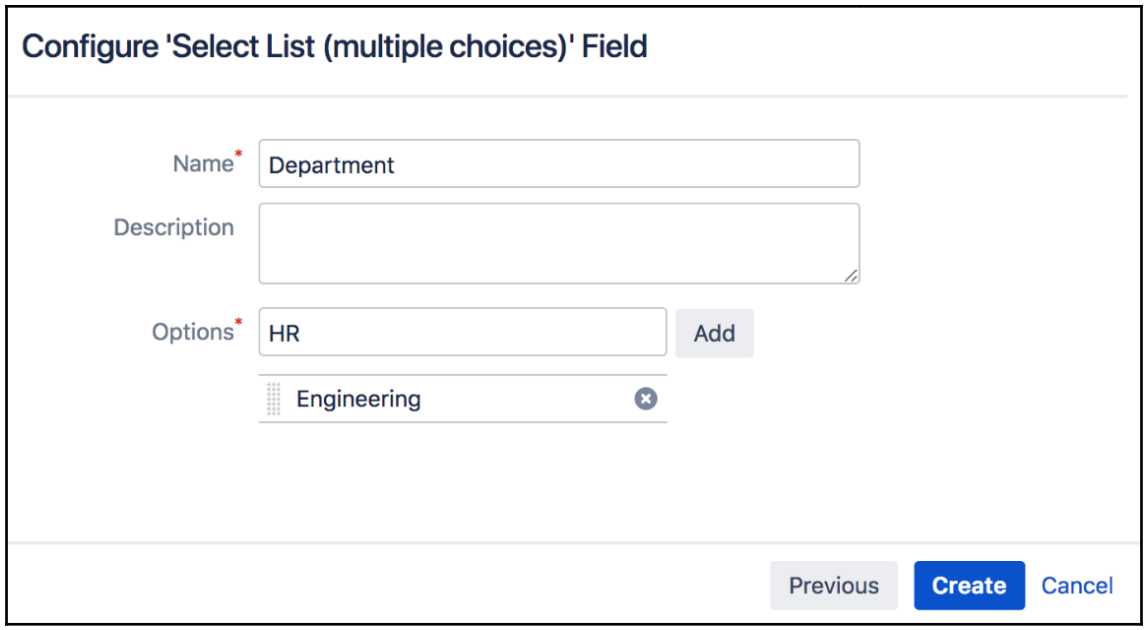

Add priority scheme
Scheme Name*
PM Priority Scheme
Description
Select priorities
Change the order of priorities by dragging and dropping them into the desired order.
Similarly, drag and drop priorities from one list to the other to add or remove them.
Selected priorities
Available priorities
Remove all
Add all
High
Medium
Low
Highest
Lowest
Default priority
Medium
Add
Cancel

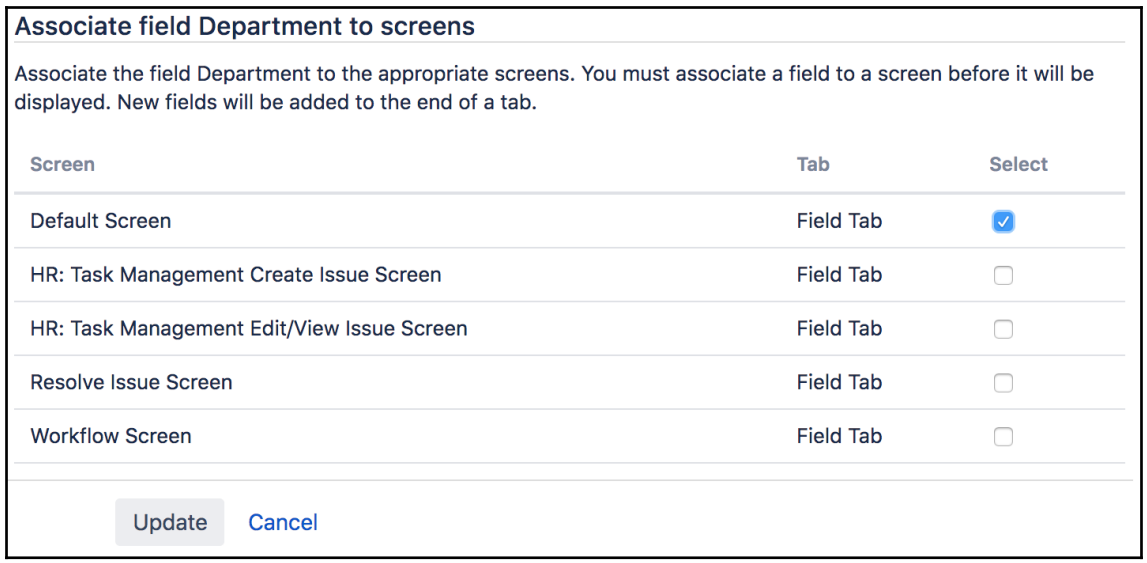

Create Issue
Configure Fields
Project*
Human Resource (HR)
Issue Type*
Task
New Employee
Termination
Summary*
Description
Style
Visual
Text
Priority
Medium
Create another
Create
Cancel

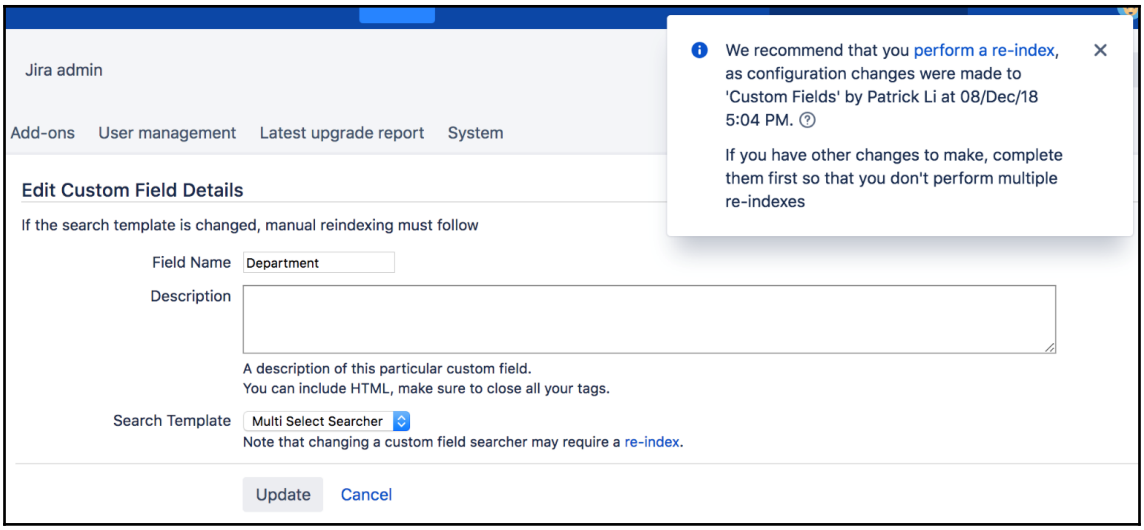
Chapter 5: Field Management

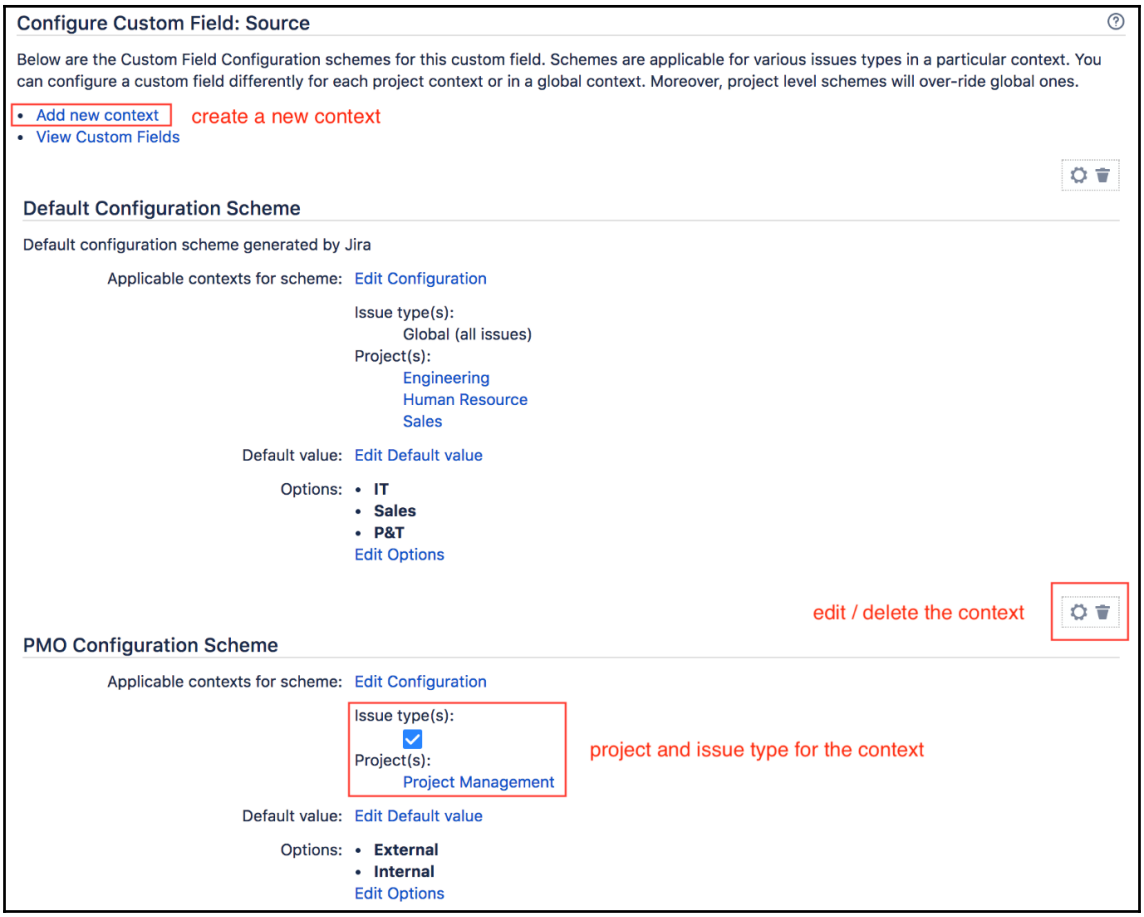


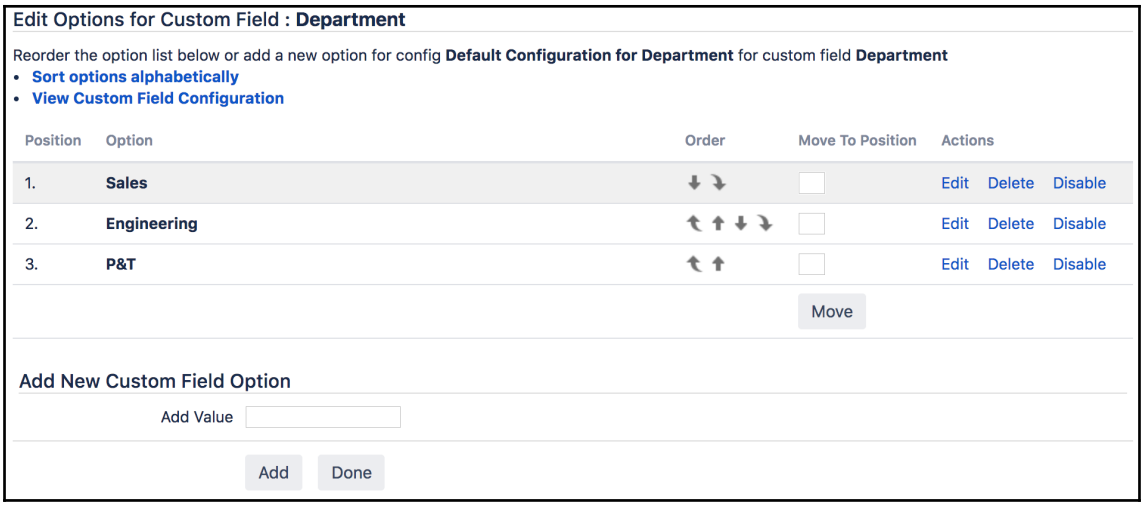


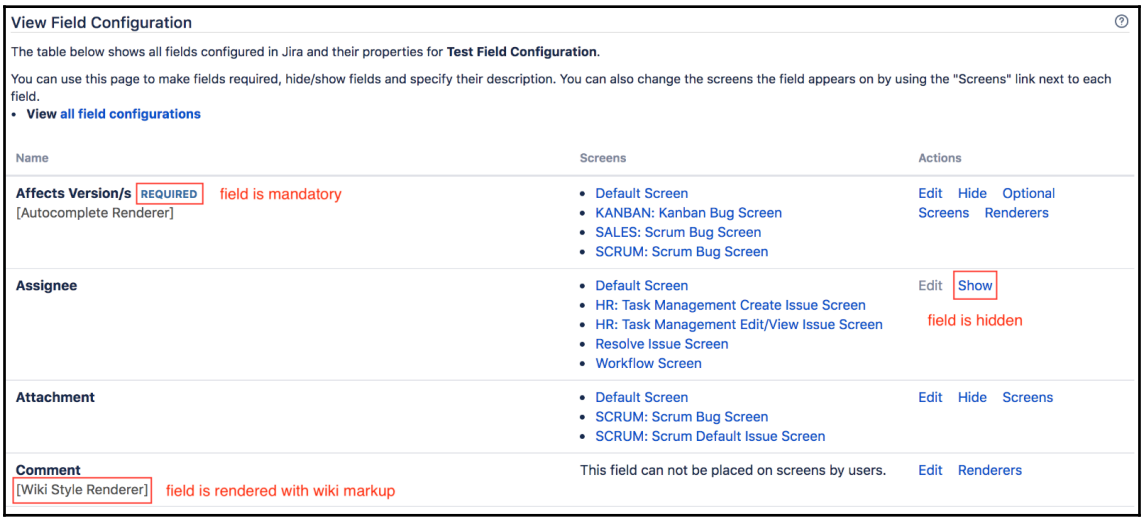

Configure 'Select List (multiple choices)' Field
Name*
Department
Description
Options*
HR
Add
Engineering
Previous
Create
Cancel

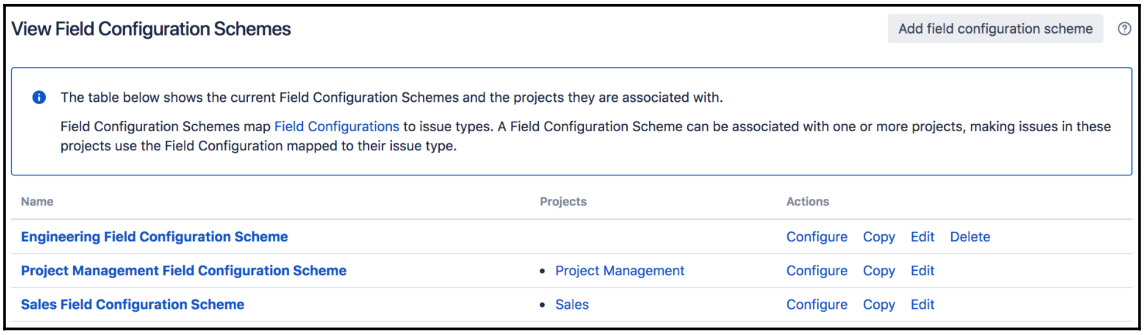

Associate field Department to screens
Associate the field Department to the appropriate screens. You must associate a field to a screen before it will be displayed. New fields will be added to the end of a tab.
Screen
Tab
Select
Default Screen
Field Tab
HR: Task Management Create Issue Screen
Field Tab
HR: Task Management Edit/View Issue Screen
Field Tab
Resolve Issue Screen
Field Tab
Workflow Screen
Field Tab
Update
Cancel

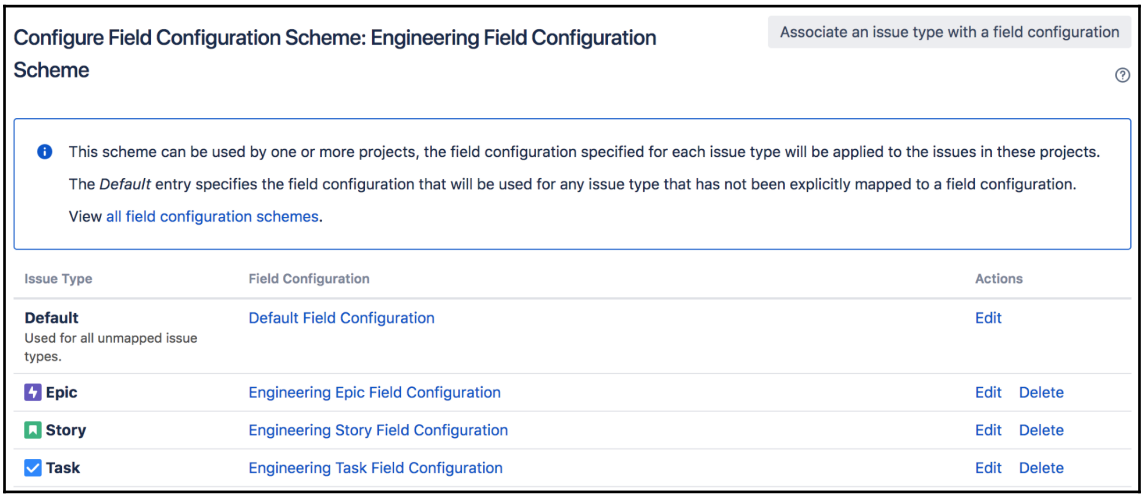

Jira admin
Add-ons
User management
Latest upgrade report
System
We recommend that you perform a re-index, as configuration changes were made to 'Custom Fields' by Patrick Li at 08/Dec/18 5:04 PM.
If you have other changes to make, complete them first so that you don't perform multiple re-indexes
Edit Custom Field Details
If the search template is changed, manual reindexing must follow
Field Name
Department
Description
A description of this particular custom field.
You can include HTML, make sure to close all your tags.
Search Template
Multi Select Searcher
Note that changing a custom field searcher may require a re-index.
Update
Cancel

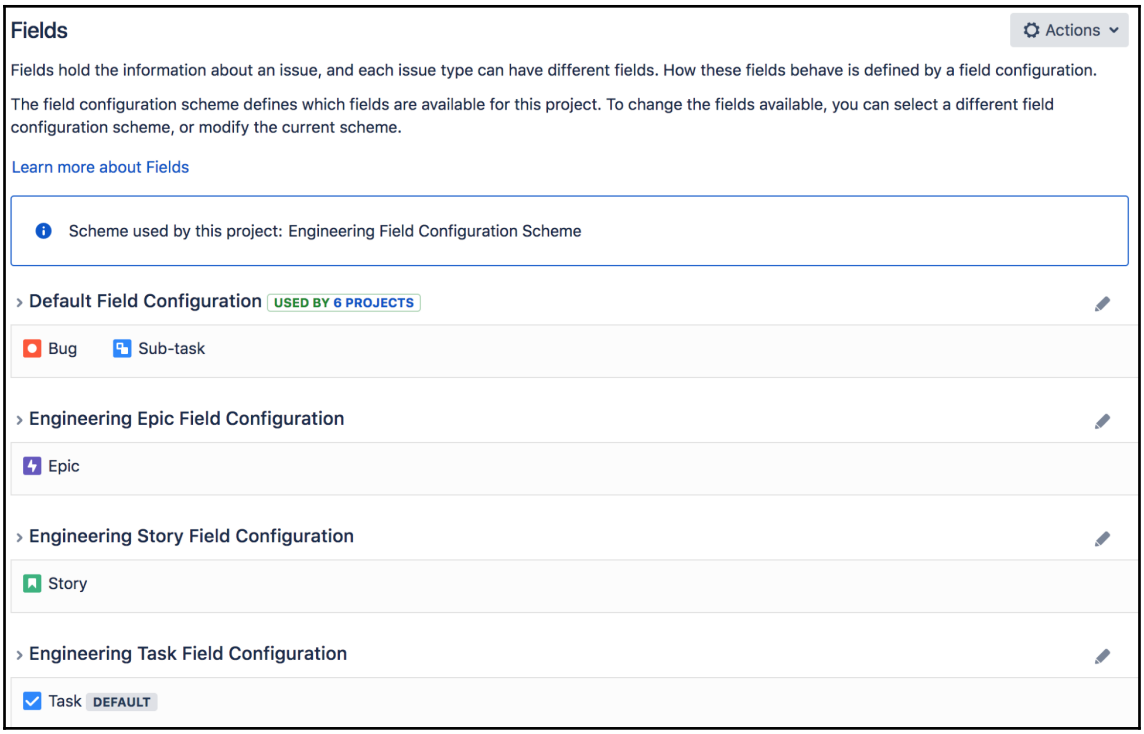

Configure Custom Field: Source
Below are the Custom Field Configuration schemes for this custom field. Schemes are applicable for various issues types in a particular context. You can configure a custom field differently for each project context or in a global context. Moreover, project level schemes will over-ride global ones.
Add new context
create a new context
View Custom Fields
Default Configuration Scheme
Default configuration scheme generated by Jira
Applicable contexts for scheme:
Edit Configuration
Issue type(s):
Global (all issues)
Project(s):
Engineering
Human Resource
Sales
Default value:
Edit Default value
Options:
IT
Sales
P&T
Edit Options
edit / delete the context
PMO Configuration Scheme
Applicable contexts for scheme:
Edit Configuration
Issue type(s):
Project(s):
Project Management
project and issue type for the context
Default value:
Edit Default value
Options:
External
Internal
Edit Options

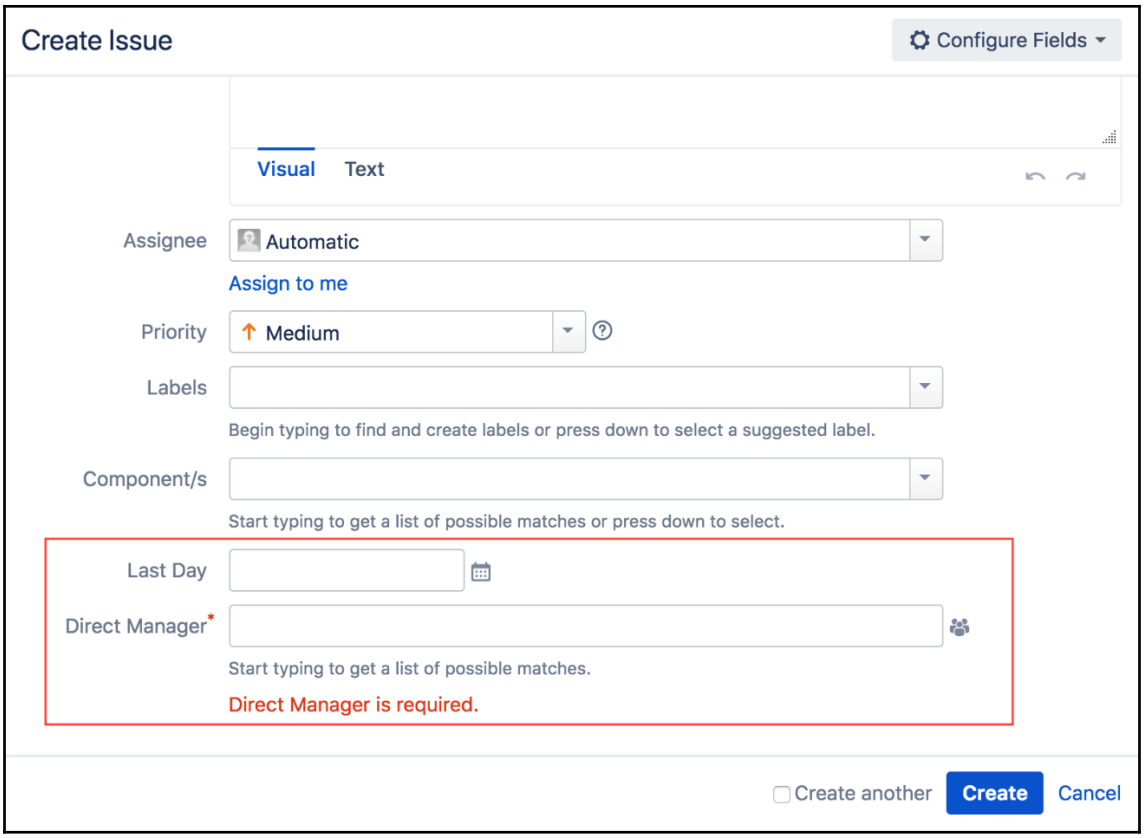

Edit Options for Custom Field : Department
Reorder the option list below or add a new option for config Default Configuration for Department for custom field Department
Sort options alphabetically
View Custom Field Configuration
Position
Option
Order
Move To Position
Actions
1.
Sales
Edit Delete Disable
2.
Engineering
Edit Delete Disable
3.
P&T
Edit Delete Disable
Move
Add New Custom Field Option
Add Value
Add
Done

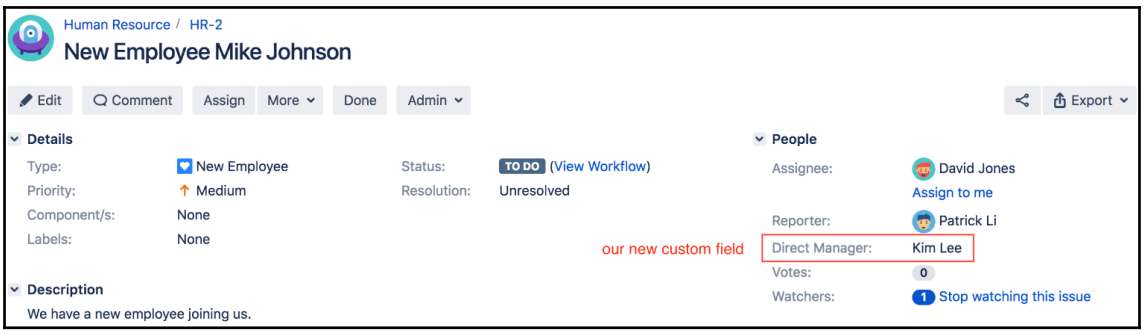

View Field Configuration
The table below shows all fields configured in Jira and their properties for Test Field Configuration.
You can use this page to make fields required, hide/show fields and specify their description. You can also change the screens the field appears on by using the "Screens" link next to each field.
View all field configurations
Name
Screens
Actions
Affects Version/s
REQUIRED
field is mandatory
[Autocomplete Renderer]
Default Screen
KANBAN: Kanban Bug Screen
SALES: Scrum Bug Screen
SCRUM: Scrum Bug Screen
Edit Hide Optional Screens Renderers
Assignee
Default Screen
HR: Task Management Create Issue Screen
HR: Task Management Edit/View Issue Screen
Resolve Issue Screen
Workflow Screen
Edit
Show
field is hidden
Attachment
Default Screen
SCRUM: Scrum Bug Screen
SCRUM: Scrum Default Issue Screen
Edit Hide Screens
Comment
[Wiki Style Renderer]
field is rendered with wiki markup
This field can not be placed on screens by users.
Edit Renderers


View Field Configuration Schemes
Add field configuration scheme
The table below shows the current Field Configuration Schemes and the projects they are associated with.
Field Configuration Schemes map Field Configurations to issue types. A Field Configuration Scheme can be associated with one or more projects, making issues in these projects use the Field Configuration mapped to their issue type.
Name
Projects
Actions
Engineering Field Configuration Scheme
Configure Copy Edit Delete
Project Management Field Configuration Scheme
Project Management
Configure Copy Edit
Sales Field Configuration Scheme
Sales
Configure Copy Edit

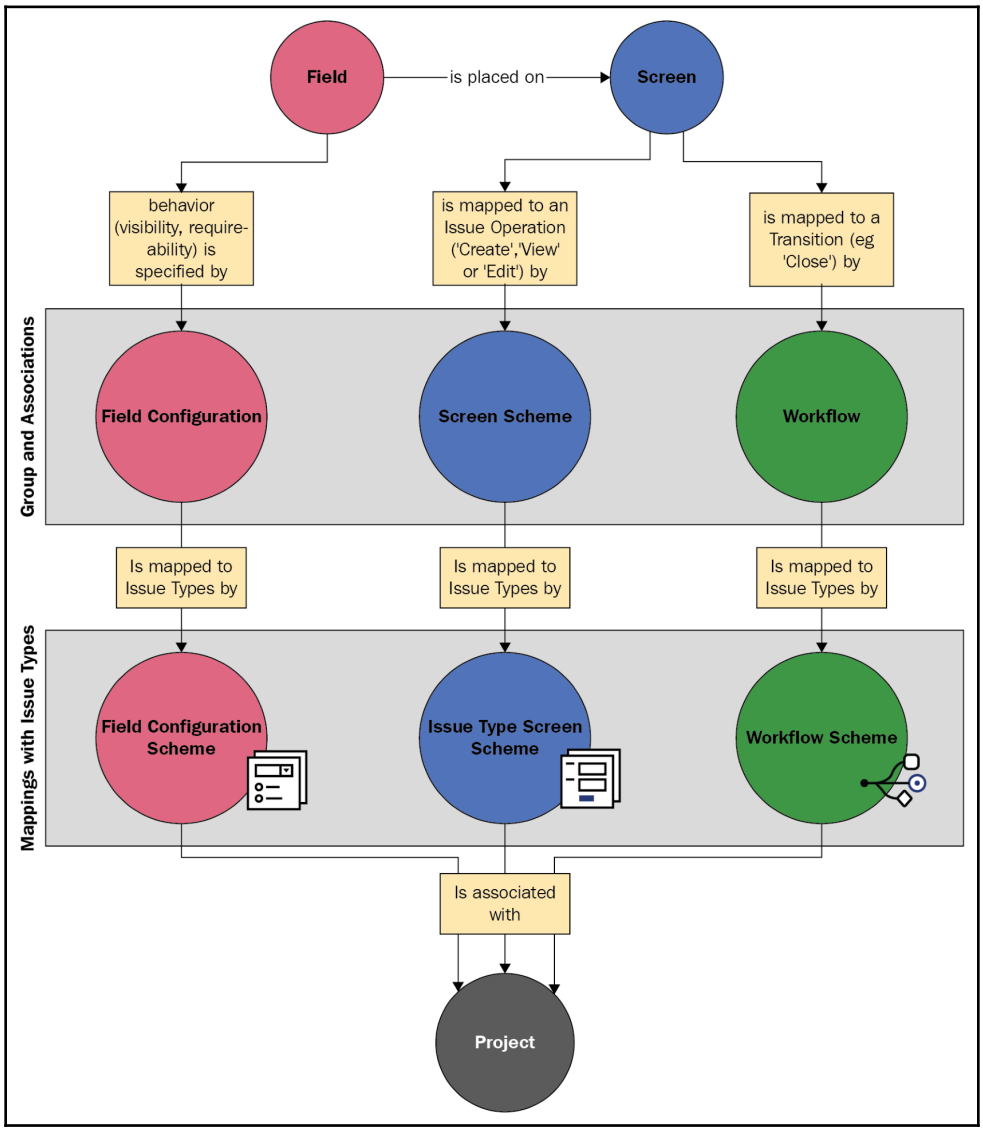

Configure Field Configuration Scheme: Engineering Field Configuration Scheme
Associate an issue type with a field configuration
This scheme can be used by one or more projects, the field configuration specified for each issue type will be applied to the issues in these projects.
The Default entry specifies the field configuration that will be used for any issue type that has not been explicitly mapped to a field configuration.
View all field configuration schemes.
Issue Type
Field Configuration
Actions
Default
Used for all unmapped issue types.
Default Field Configuration
Edit
Epic
Engineering Epic Field Configuration
Edit Delete
Story
Engineering Story Field Configuration
Edit Delete
Task
Engineering Task Field Configuration
Edit Delete

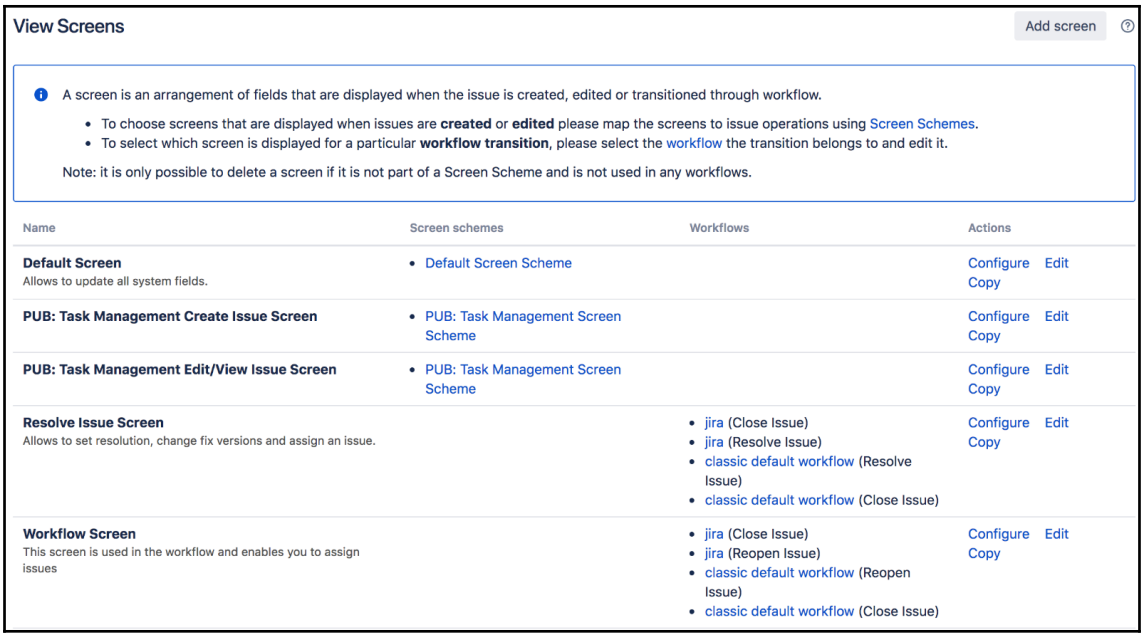

Fields
Actions
Fields hold the information about an issue, and each issue type can have different fields. How these fields behave is defined by a field configuration.
The field configuration scheme defines which fields are available for this project. To change the fields available, you can select a different field configuration scheme, or modify the current scheme.
Learn more about Fields
Scheme used by this project: Engineering Field Configuration Scheme
Default Field Configuration
USED BY 6 PROJECTS
Bug
Sub-task
Engineering Epic Field Configuration
Epic
Engineering Story Field Configuration
Story
Engineering Task Field Configuration
Task
DEFAULT

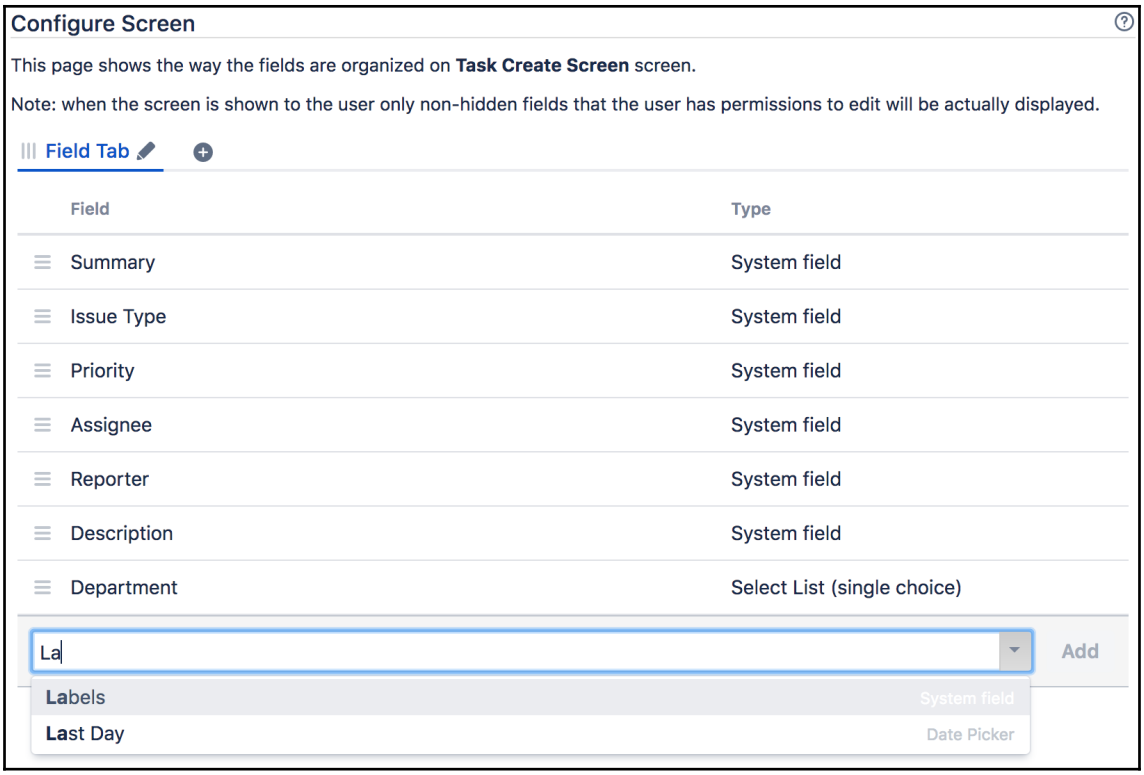

Create Issue
Configure Fields
Visual
Text
Assignee
Automatic
Assign to me
Priority
Medium
Labels
Begin typing to find and create labels or press down to select a suggested label.
Component/s
Start typing to get a list of possible matches or press down to select.
Last Day
Direct Manager*
Start typing to get a list of possible matches.
Direct Manager is required.
Create another
Create
Cancel

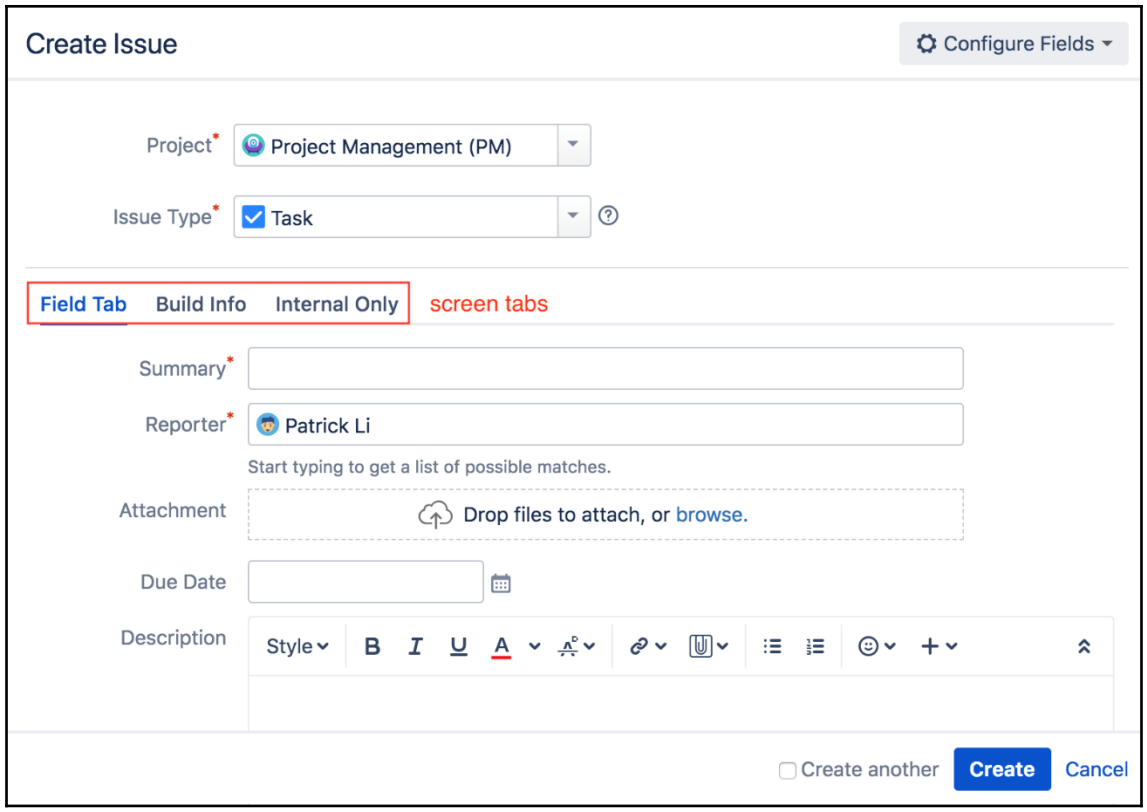

Human Resource / HR-2
New Employee Mike Johnson
Edit
Comment
Assign
More
Done
Admin
Export
Details
Type:
New Employee
Priority:
Medium
Component/s:
None
Labels:
None
Status:
TO DO (View Workflow)
Resolution:
Unresolved
our new custom field
People
Assignee:
David Jones
Assign to me
Reporter:
Patrick Li
Direct Manager:
Kim Lee
Votes:
0
Watchers:
1 Stop watching this issue
Description
We have a new employee joining us.

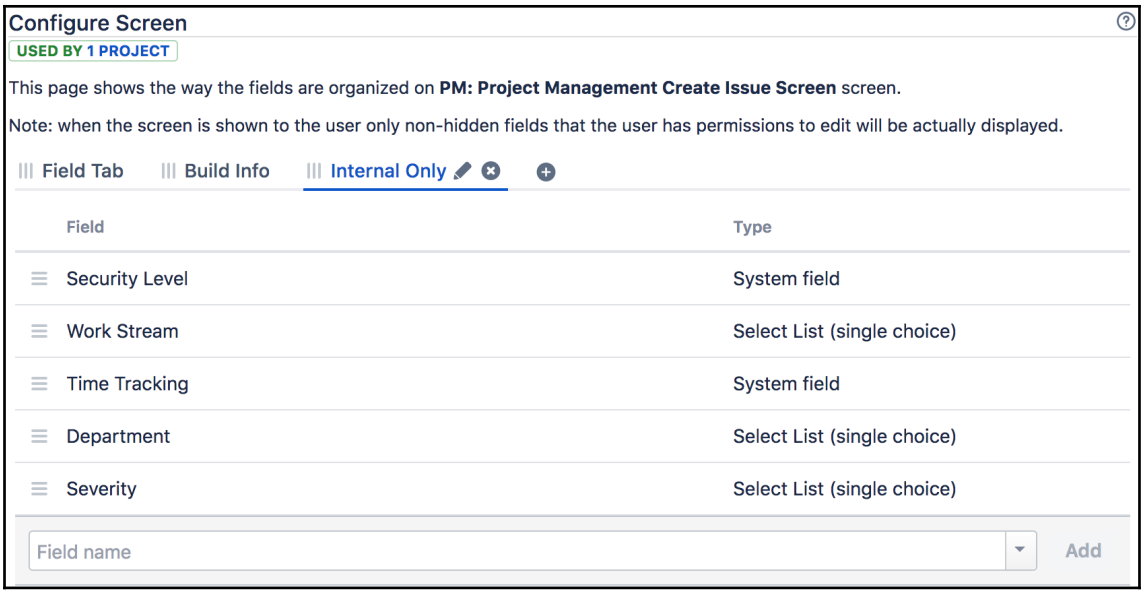
Chapter 6: Screen Management

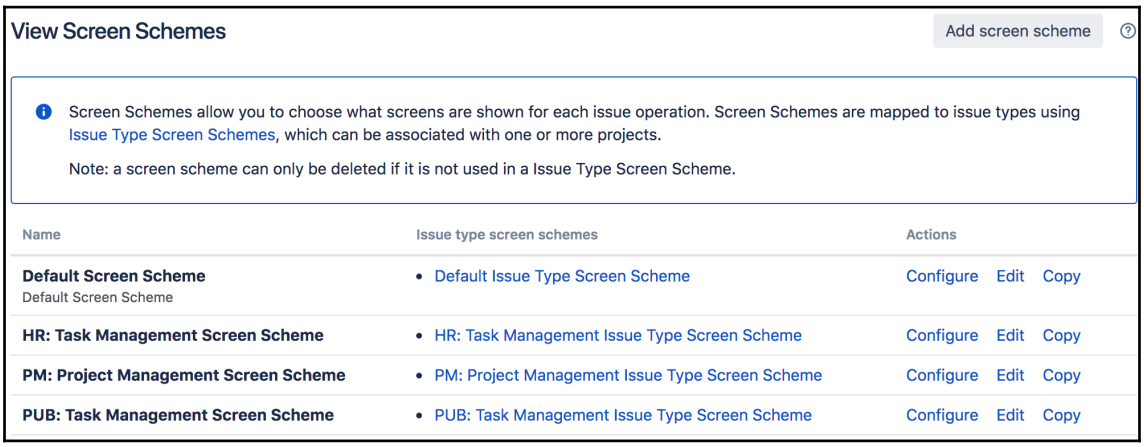


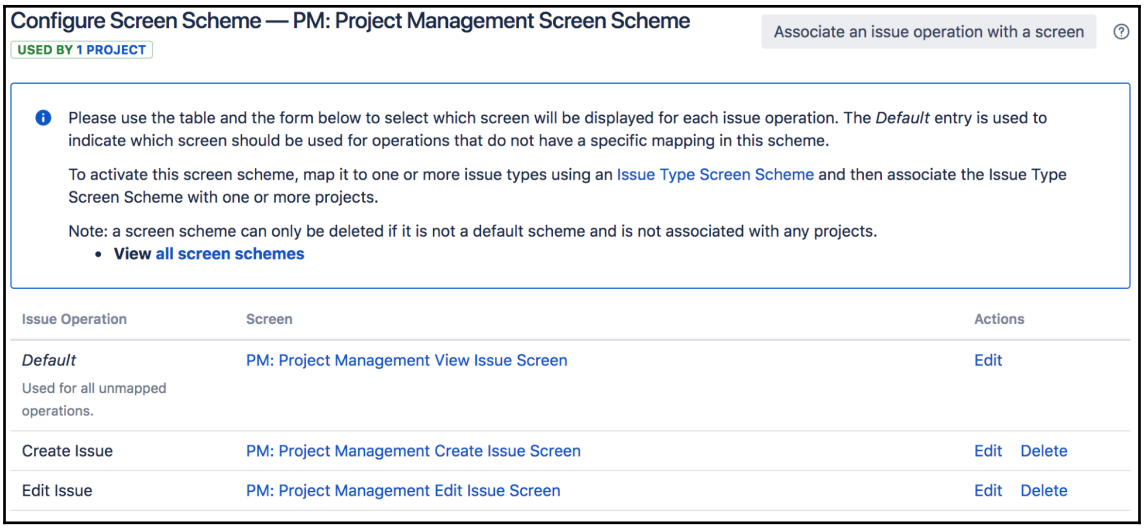

View Screens
Add screen
A screen is an arrangement of fields that are displayed when the issue is created, edited or transitioned through workflow.
To choose screens that are displayed when issues are created or edited please map the screens to issue operations using Screen Schemes.
To select which screen is displayed for a particular workflow transition, please select the workflow the transition belongs to and edit it.
Note: it is only possible to delete a screen if it is not part of a Screen Scheme and is not used in any workflows.
Name
Screen schemes
Workflows
Actions
Default Screen
Allows to update all system fields.
Default Screen Scheme
Configure Edit Copy
PUB: Task Management Create Issue Screen
PUB: Task Management Screen Scheme
Configure Edit Copy
PUB: Task Management Edit/View Issue Screen
PUB: Task Management Screen Scheme
Configure Edit Copy
Resolve Issue Screen
Allows to set resolution, change fix versions and assign an issue.
jira (Close Issue)
jira (Resolve Issue)
classic default workflow (Resolve Issue)
classic default workflow (Close Issue)
Configure Edit Copy
Workflow Screen
This screen is used in the workflow and enables you to assign issues
jira (Close Issue)
jira (Reopen Issue)
classic default workflow (Reopen Issue)
classic default workflow (Close Issue)
Configure Edit Copy

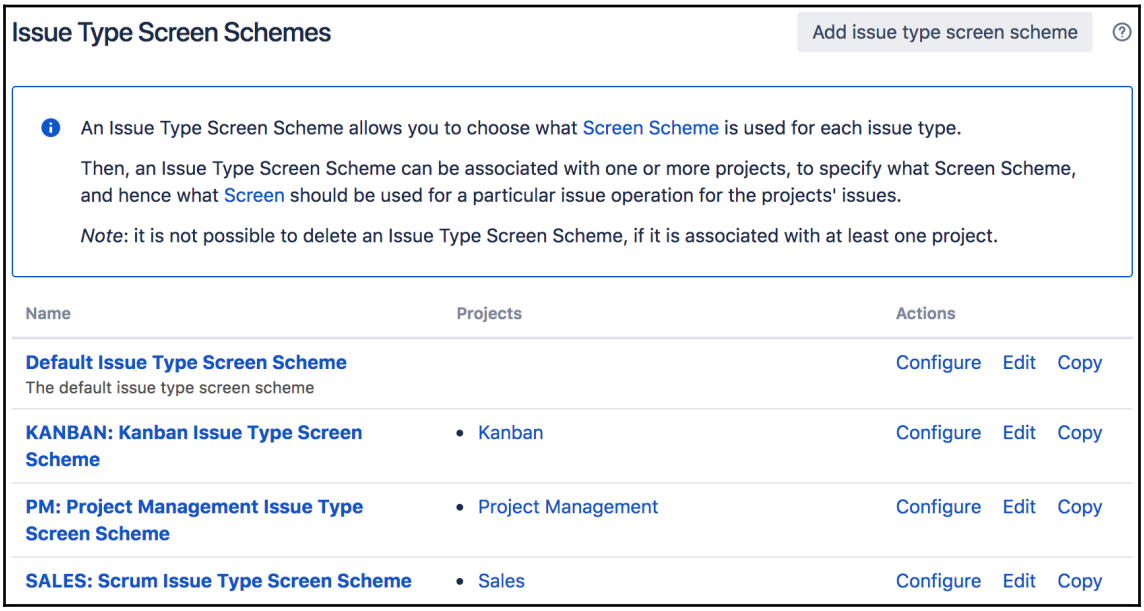

Configure Screen
This page shows the way the fields are organized on Task Create Screen screen.
Note: when the screen is shown to the user only non-hidden fields that the user has permissions to edit will be actually displayed.
Field Tab
Field
Type
Summary
System field
Issue Type
System field
Priority
System field
Assignee
System field
Reporter
System field
Description
System field
Department
Select List (single choice)
La
Add
Labels
System field
Last Day
Date Picker

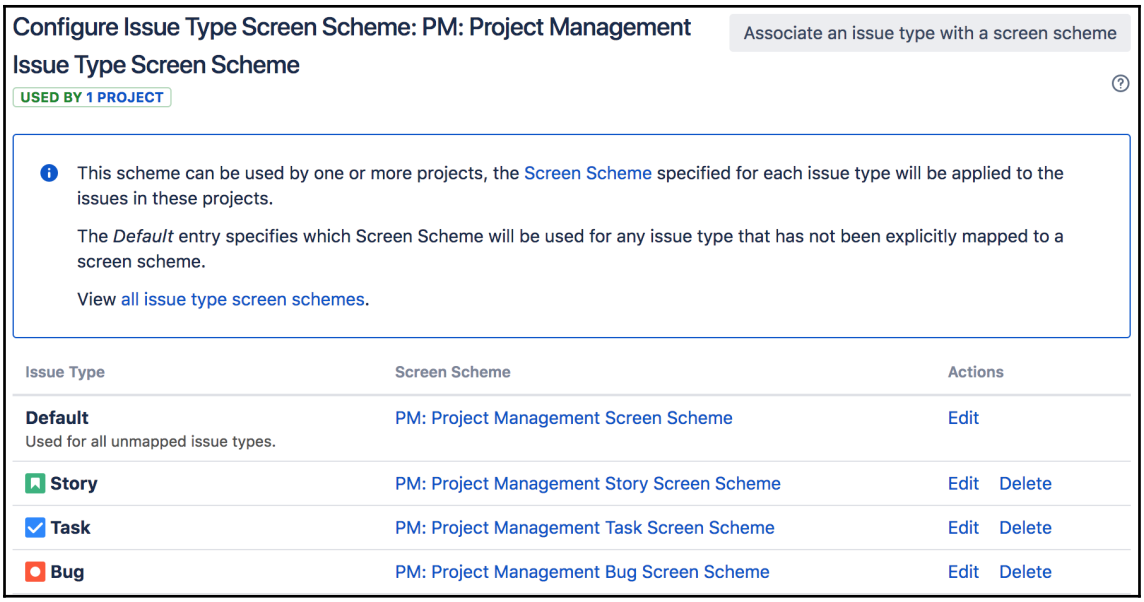

Create Issue
Configure Fields
Project*
Project Management (PM)
Issue Type*
Task
Field Tab
Build Info
Internal Only
screen tabs
Summary*
Reporter*
Patrick Li
Start typing to get a list of possible matches.
Attachment
Drop files to attach, or browse.
Due Date
Description
Style
Create another
Create
Cancel

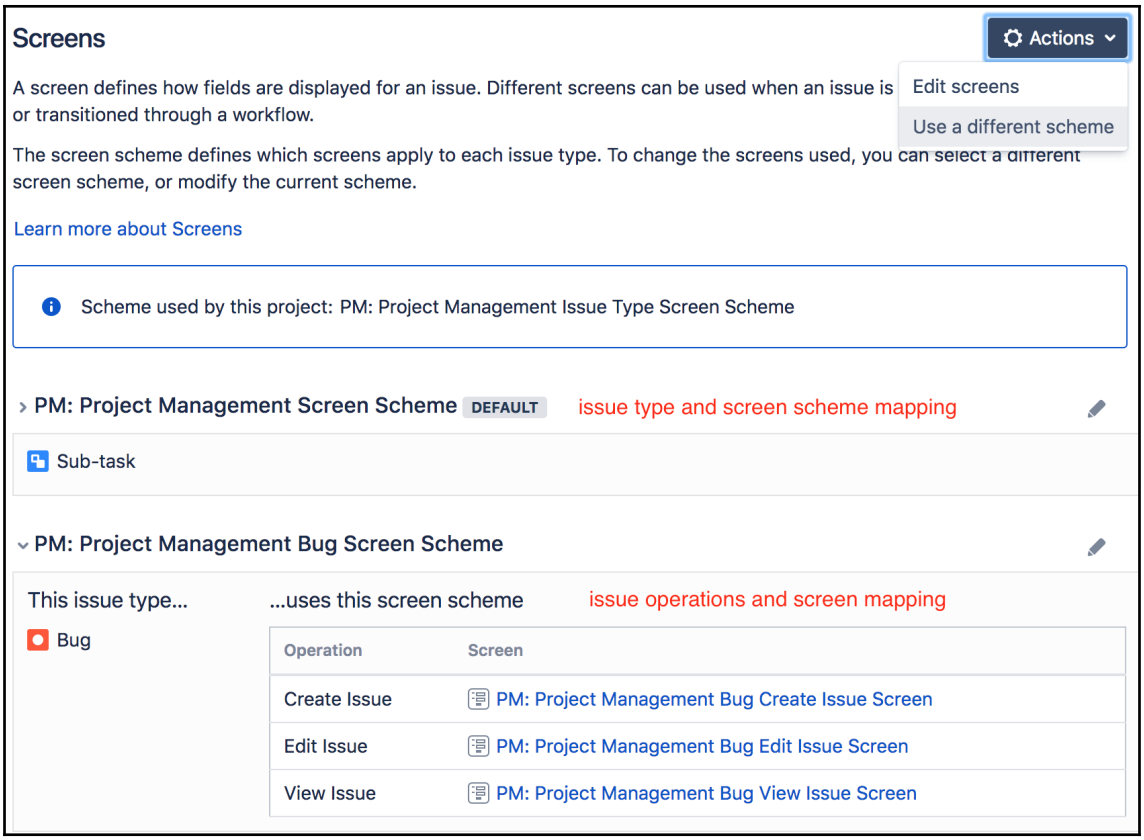

Configure Screen
USED BY 1 PROJECT
This page shows the way the fields are organized on PM: Project Management Create Issue Screen screen.
Note: when the screen is shown to the user only non-hidden fields that the user has permissions to edit will be actually displayed.
Field Tab
Build Info
Internal Only
Field
Type
Security Level
System field
Work Stream
Select List (single choice)
Time Tracking
System field
Department
Select List (single choice)
Severity
Select List (single choice)
Field name
Add

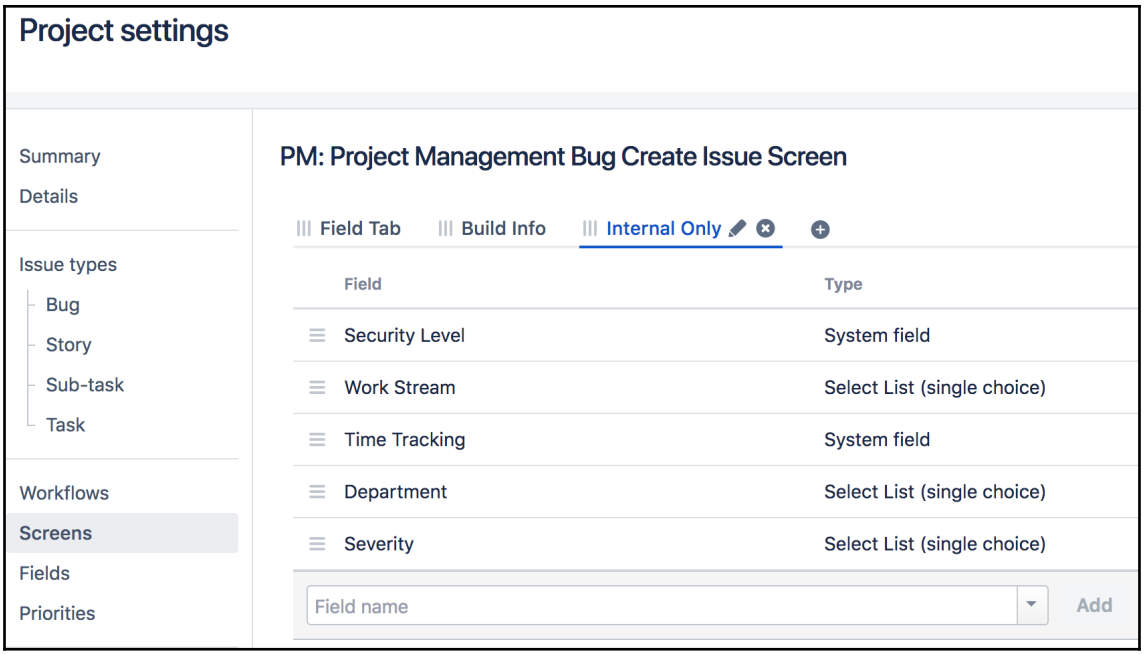

View Screen Schemes
Add screen scheme
Screen Schemes allow you to choose what screens are shown for each issue operation. Screen Schemes are mapped to issue types using Issue Type Screen Schemes, which can be associated with one or more projects.
Note: a screen scheme can only be deleted if it is not used in a Issue Type Screen Scheme.
Name
Issue type screen schemes
Actions
Default Screen Scheme
Default Screen Scheme
Default Issue Type Screen Scheme
Configure Edit Copy
HR: Task Management Screen Scheme
HR: Task Management Issue Type Screen Scheme
Configure Edit Copy
PM: Project Management Screen Scheme
PM: Project Management Issue Type Screen Scheme
Configure Edit Copy
PUB: Task Management Screen Scheme
PUB: Task Management Issue Type Screen Scheme
Configure Edit Copy

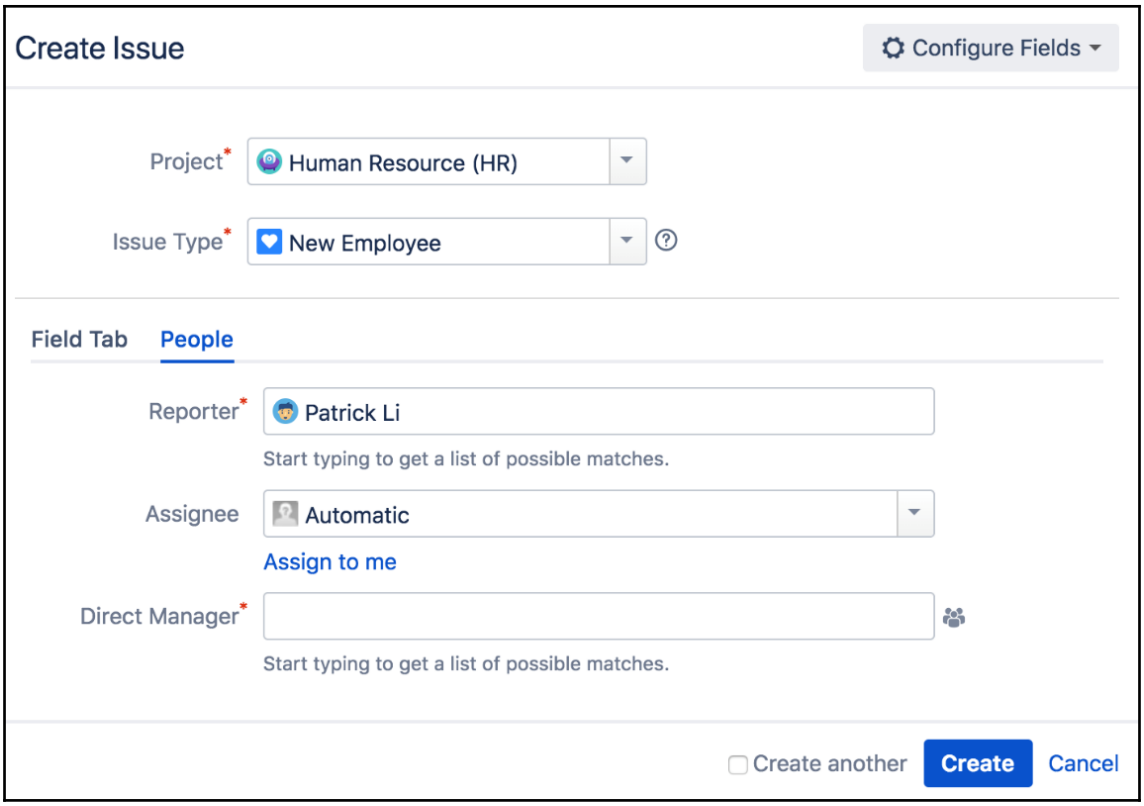

Configure Screen Scheme — PM: Project Management Screen Scheme
USED BY 1 PROJECT
Associate an issue operation with a screen
Please use the table and the form below to select which screen will be displayed for each issue operation. The Default entry is used to indicate which screen should be used for operations that do not have a specific mapping in this scheme.
To activate this screen scheme, map it to one or more issue types using an Issue Type Screen Scheme and then associate the Issue Type Screen Scheme with one or more projects.
Note: a screen scheme can only be deleted if it is not a default scheme and is not associated with any projects.
View all screen schemes
Issue Operation
Screen
Actions
Default
Used for all unmapped operations.
PM: Project Management View Issue Screen
Edit
Create Issue
PM: Project Management Create Issue Screen
Edit Delete
Edit Issue
PM: Project Management Edit Issue Screen
Edit Delete


Issue Type Screen Schemes
Add issue type screen scheme
An Issue Type Screen Scheme allows you to choose what Screen Scheme is used for each issue type.
Then, an Issue Type Screen Scheme can be associated with one or more projects, to specify what Screen Scheme, and hence what Screen should be used for a particular issue operation for the projects' issues.
Note: it is not possible to delete an Issue Type Screen Scheme, if it is associated with at least one project.
Name
Projects
Actions
Default Issue Type Screen Scheme
The default issue type screen scheme
Configure Edit Copy
KANBAN: Kanban Issue Type Screen Scheme
Kanban
Configure Edit Copy
PM: Project Management Issue Type Screen Scheme
Project Management
Configure Edit Copy
SALES: Scrum Issue Type Screen Scheme
Sales
Configure Edit Copy

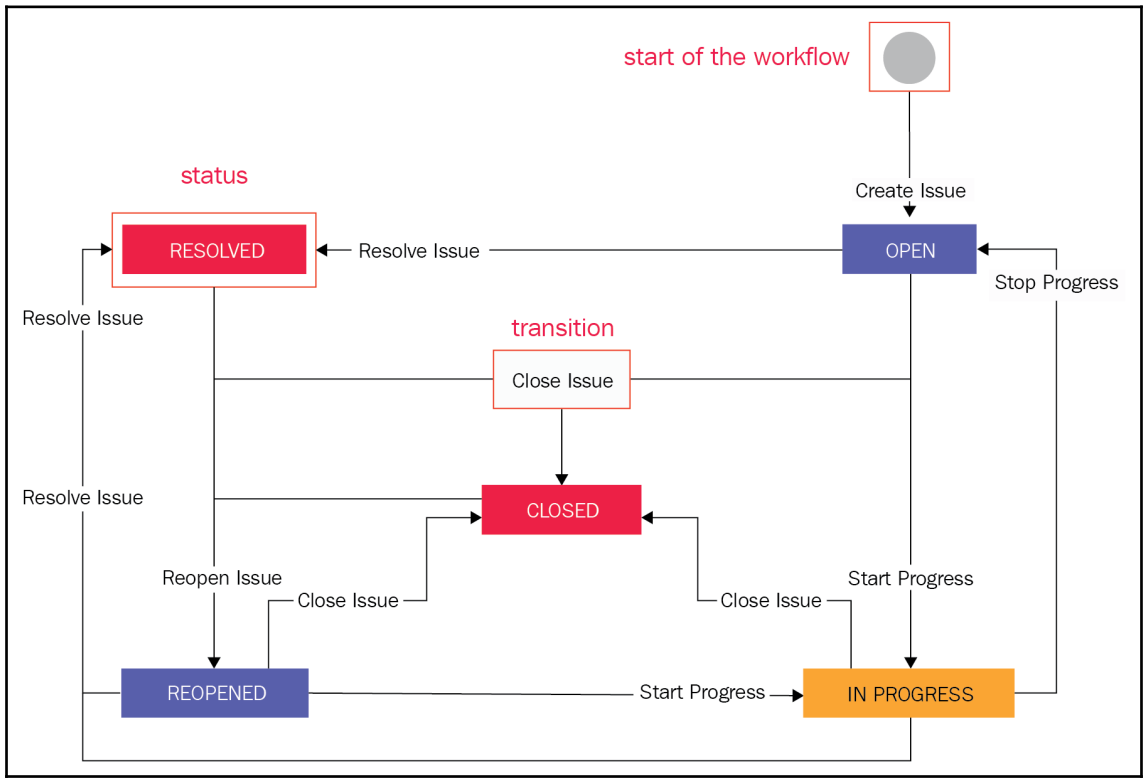

Configure Issue Type Screen Scheme: PM: Project Management Issue Type Screen Scheme
Associate an issue type with a screen scheme
USED BY 1 PROJECT
This scheme can be used by one or more projects, the Screen Scheme specified for each issue type will be applied to the issues in these projects.
The Default entry specifies which Screen Scheme will be used for any issue type that has not been explicitly mapped to a screen scheme.
View all issue type screen schemes.
Issue Type
Screen Scheme
Actions
Default
Used for all unmapped issue types.
PM: Project Management Screen Scheme
Edit
Story
PM: Project Management Story Screen Scheme
Edit
Delete
Task
PM: Project Management Task Screen Scheme
Edit
Delete
Bug
PM: Project Management Bug Screen Scheme
Edit
Delete

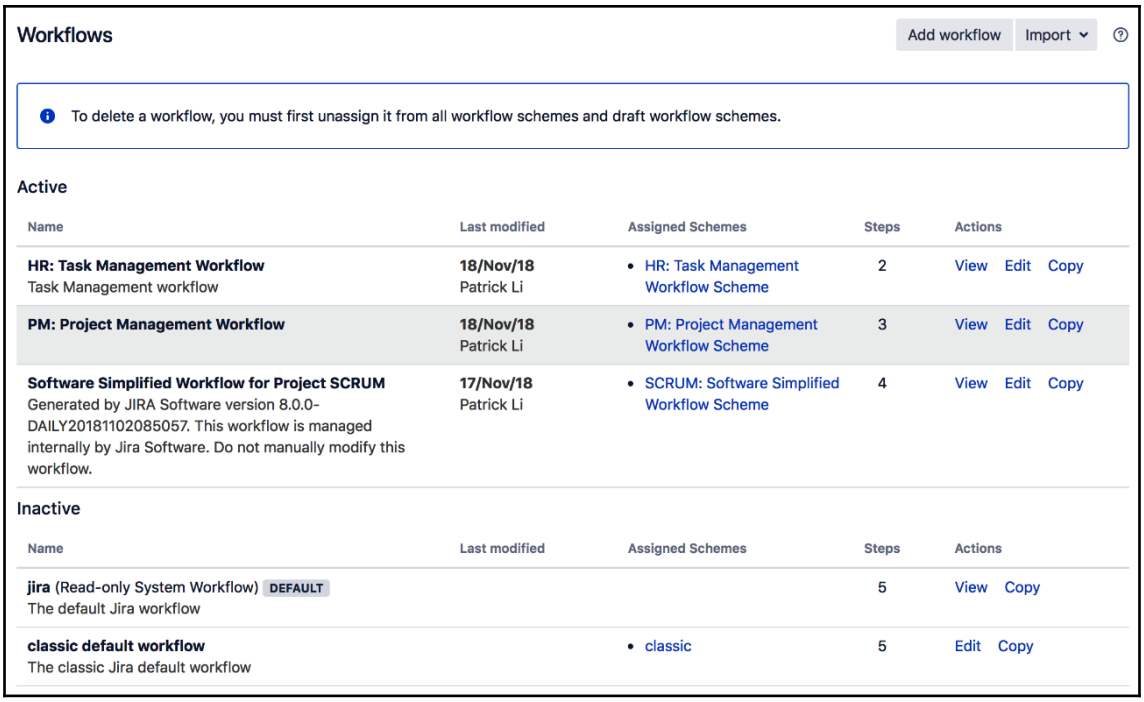

Screens
Actions
Edit screens
Use a different scheme
A screen defines how fields are displayed for an issue. Different screens can be used when an issue is
or transitioned through a workflow.
The screen scheme defines which screens apply to each issue type. To change the screens used, you can select a different
screen scheme, or modify the current scheme.
Learn more about Screens
Scheme used by this project: PM: Project Management Issue Type Screen Scheme
PM: Project Management Screen Scheme
DEFAULT
issue type and screen scheme mapping
Sub-task
PM: Project Management Bug Screen Scheme
This issue type...
...uses this screen scheme
issue operations and screen mapping
Bug
Operation
Screen
Create Issue
PM: Project Management Bug Create Issue Screen
Edit Issue
PM: Project Management Bug Edit Issue Screen
View Issue
PM: Project Management Bug View Issue Screen

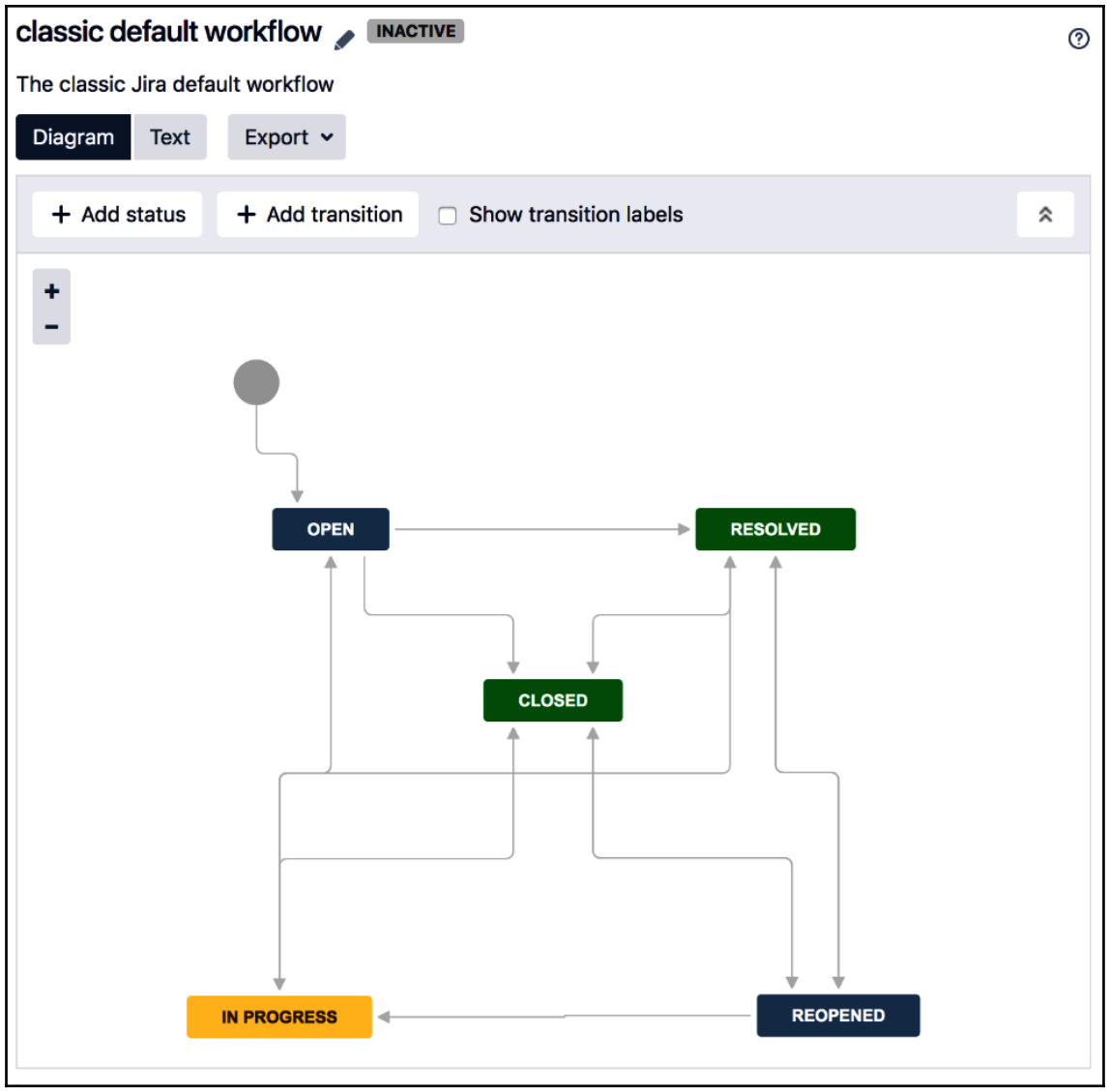

Project settings
Summary
Details
Issue types
Bug
Story
Sub-task
Task
Workflows
Screens
Fields
Priorities
PM: Project Management Bug Create Issue Screen
Field Tab
Build Info
Internal Only
Field
Type
Security Level
System field
Work Stream
Select List (single choice)
Time Tracking
System field
Department
Select List (single choice)
Severity
Select List (single choice)
Field name
Add

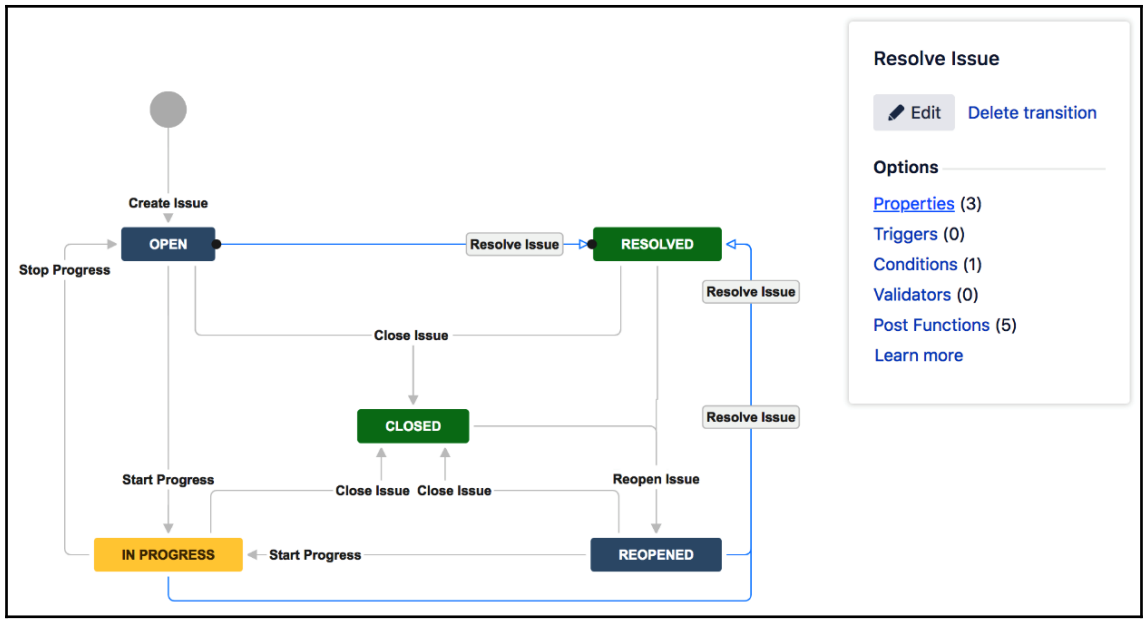

Create Issue
Configure Fields
Project*
Human Resource (HR)
Issue Type*
New Employee
Field Tab
People
Reporter*
Patrick Li
Start typing to get a list of possible matches.
Assignee
Automatic
Assign to me
Direct Manager*
Start typing to get a list of possible matches.
Create another
Create
Cancel

Chapter 7: Workflow and Business Process




Workflows
Add workflow
Import
To delete a workflow, you must first unassign it from all workflow schemes and draft workflow schemes.
Active
Name
Last modified
Assigned Schemes
Steps
Actions
HR: Task Management Workflow
Task Management workflow
18/Nov/18
Patrick Li
HR: Task Management Workflow Scheme
2
View Edit Copy
PM: Project Management Workflow
18/Nov/18
Patrick Li
PM: Project Management Workflow Scheme
3
View Edit Copy
Software Simplified Workflow for Project SCRUM
Generated by JIRA Software version 8.0.0-DAILY20181102085057. This workflow is managed internally by Jira Software. Do not manually modify this workflow.
17/Nov/18
Patrick Li
SCRUM: Software Simplified Workflow Scheme
4
View Edit Copy
Inactive
Name
Last modified
Assigned Schemes
Steps
Actions
jira (Read-only System Workflow) DEFAULT
The default Jira workflow
5
View Copy
classic default workflow
The classic Jira default workflow
classic
5
Edit Copy


classic default workflow
INACTIVE
The classic Jira default workflow
Diagram
Text
Export
Add status
Add transition
Show transition labels
OPEN
RESOLVED
CLOSED
IN PROGRESS
REOPENED


Create Issue
OPEN
Stop Progress
Resolve Issue
RESOLVED
Resolve Issue
Close Issue
CLOSED
Resolve Issue
Start Progress
Close Issue
Close Issue
Reopen Issue
IN PROGRESS
Start Progress
REOPENED
Resolve Issue
Edit
Delete transition
Options
Properties (3)
Triggers (0)
Conditions (1)
Validators (0)
Post Functions (5)
Learn more

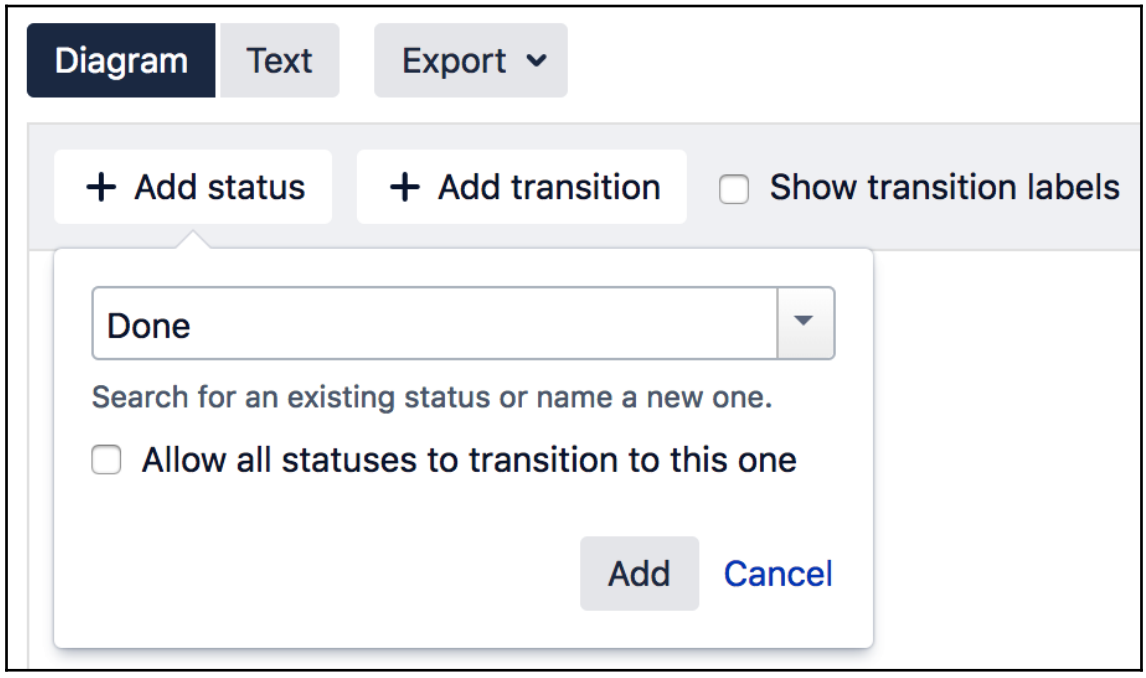
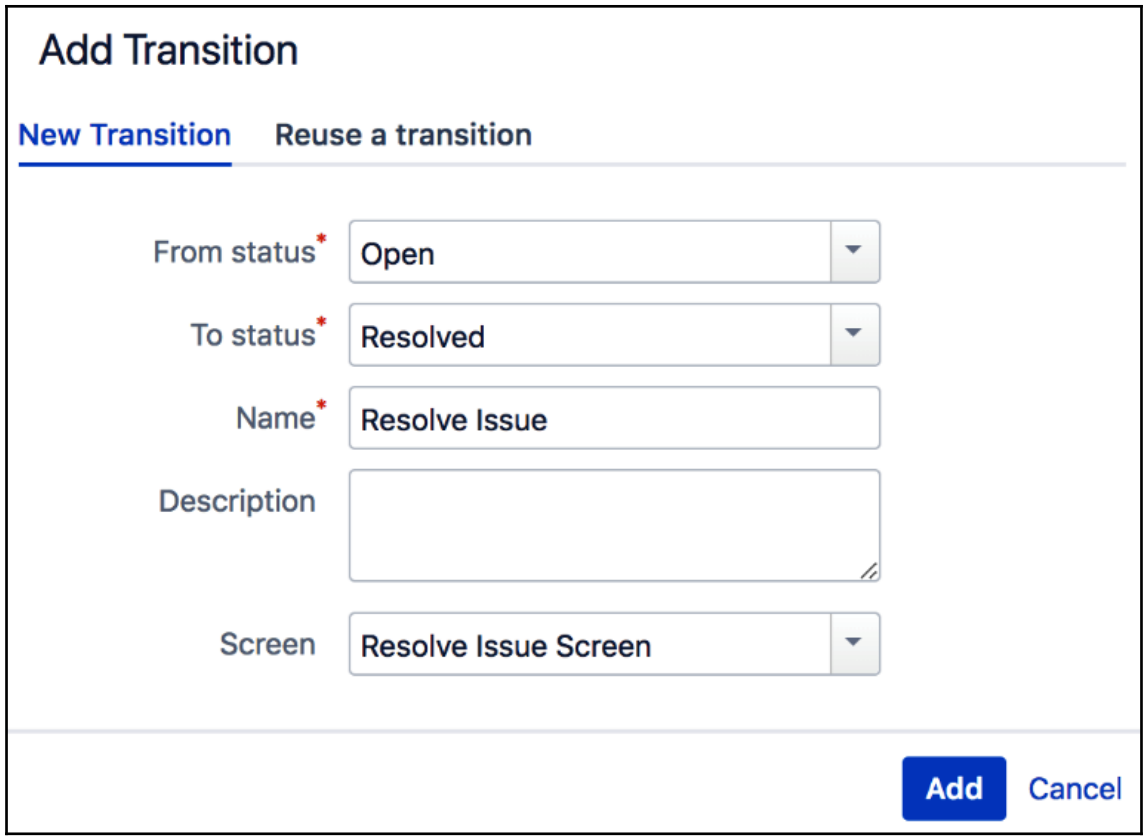
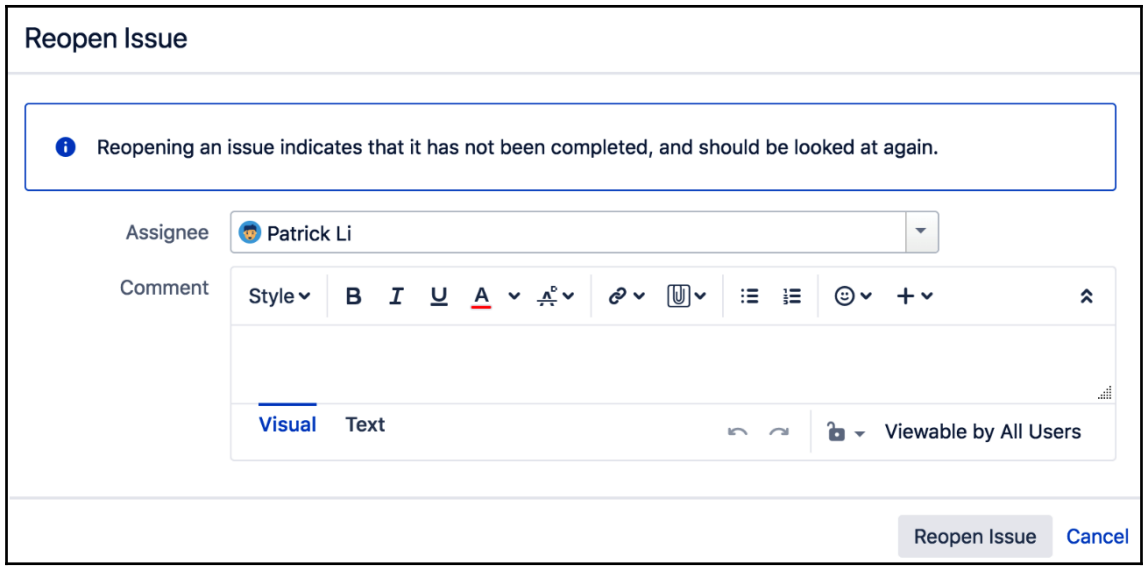
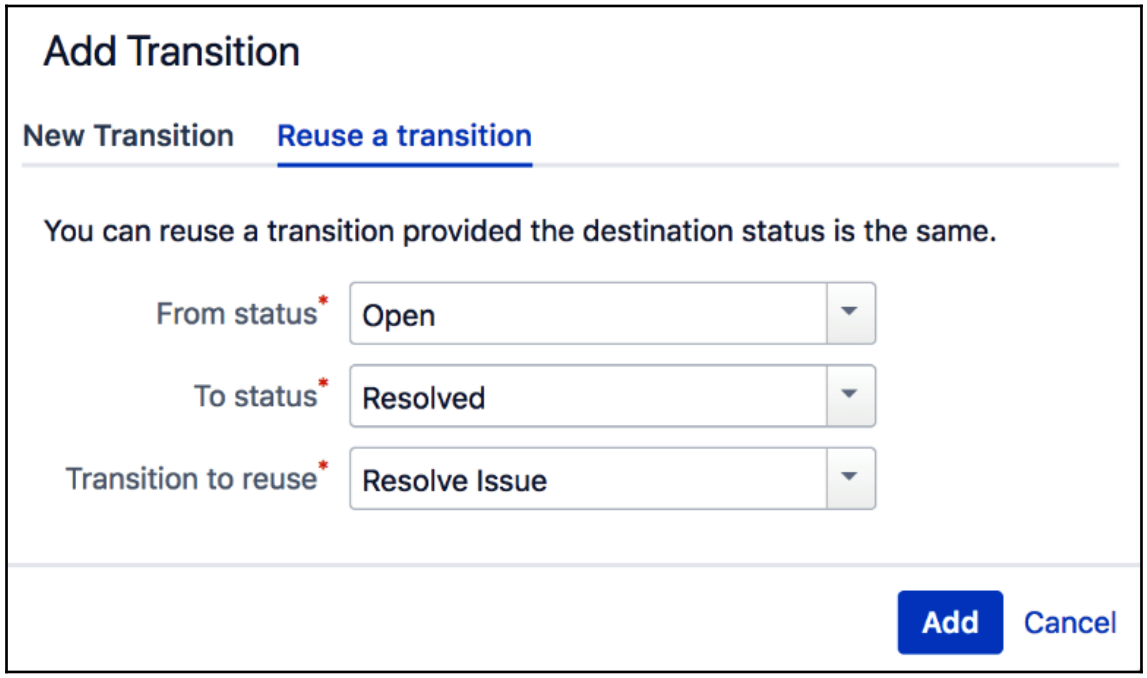
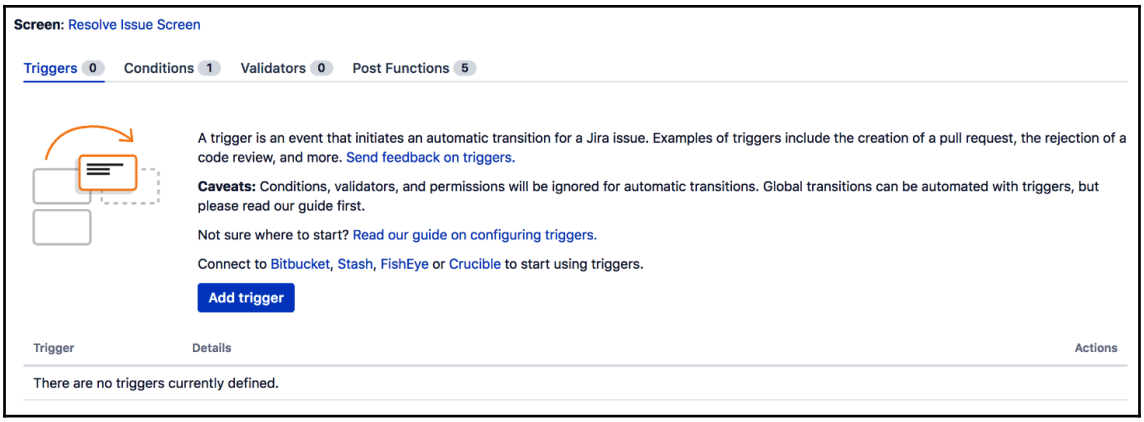


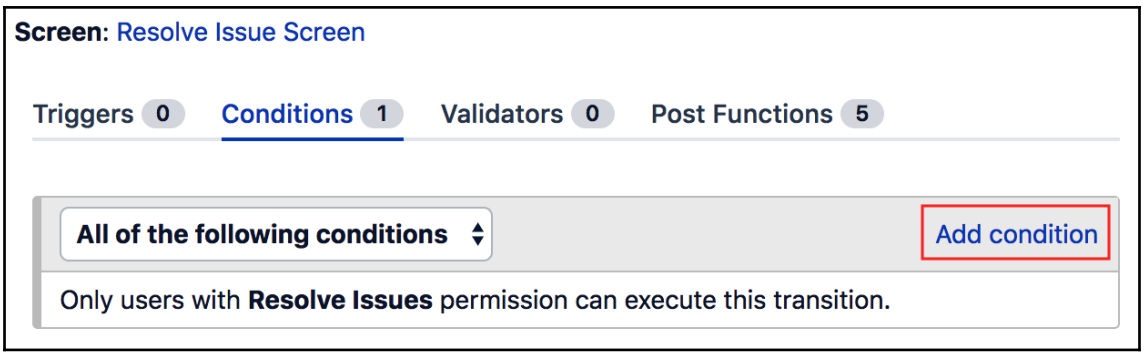
Diagram
Text
Export
+ Add status
+ Add transition
Show transition labels
Done
Search for an existing status or name a new one.
Allow all statuses to transition to this one
Add
Cancel

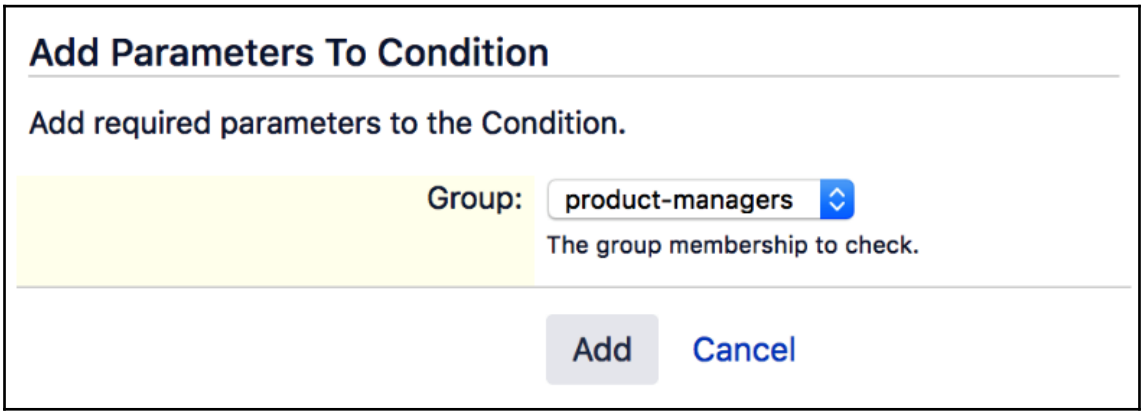

Add Transition
New Transition
Reuse a transition
From status*
Open
To status*
Resolved
Name*
Resolve Issue
Description
Screen
Resolve Issue Screen
Add
Cancel

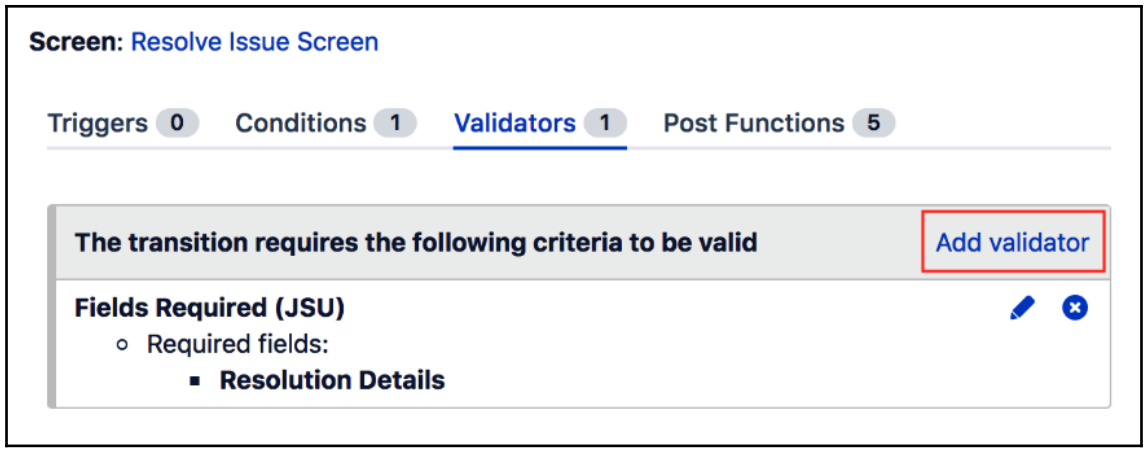

Reopen Issue
Reopening an issue indicates that it has not been completed, and should be looked at again.
Assignee
Patrick Li
Comment
Style
Visual
Text
Viewable by All Users
Reopen Issue
Cancel

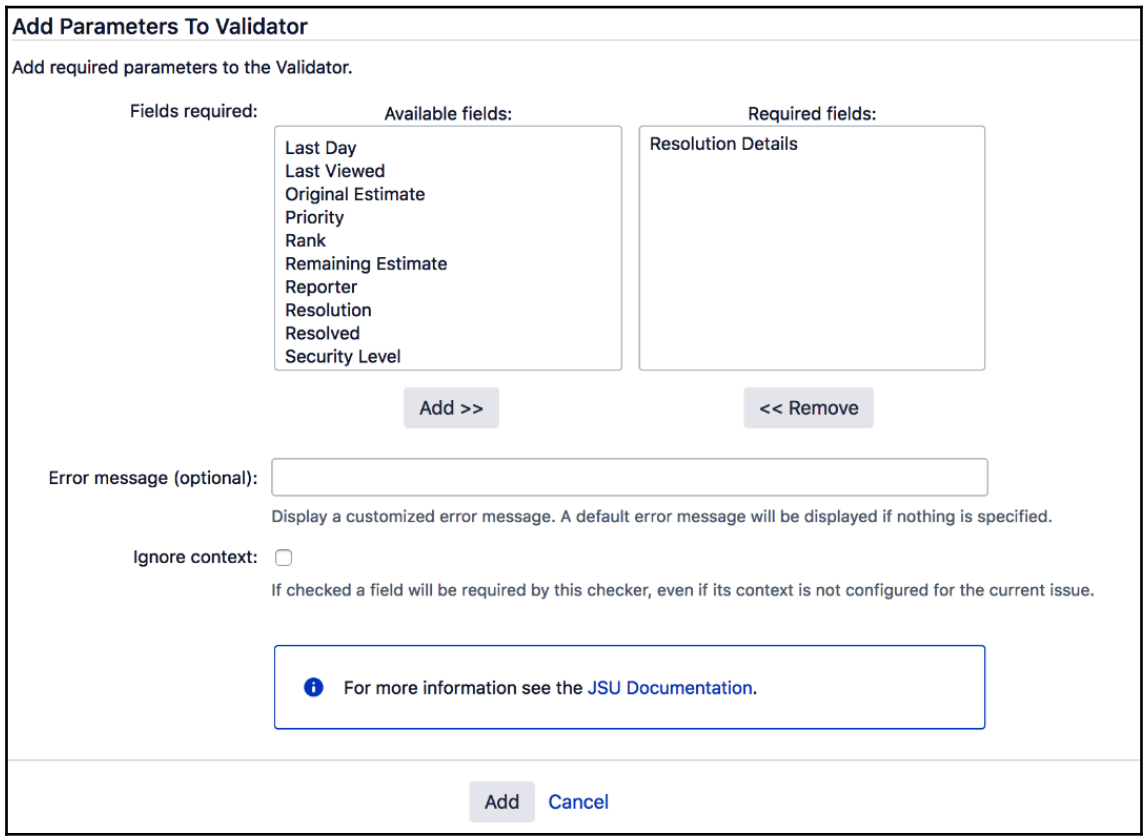

Add Transition
New Transition
Reuse a transition
You can reuse a transition provided the destination status is the same.
From status*
Open
To status*
Resolved
Transition to reuse*
Resolve Issue
Add
Cancel

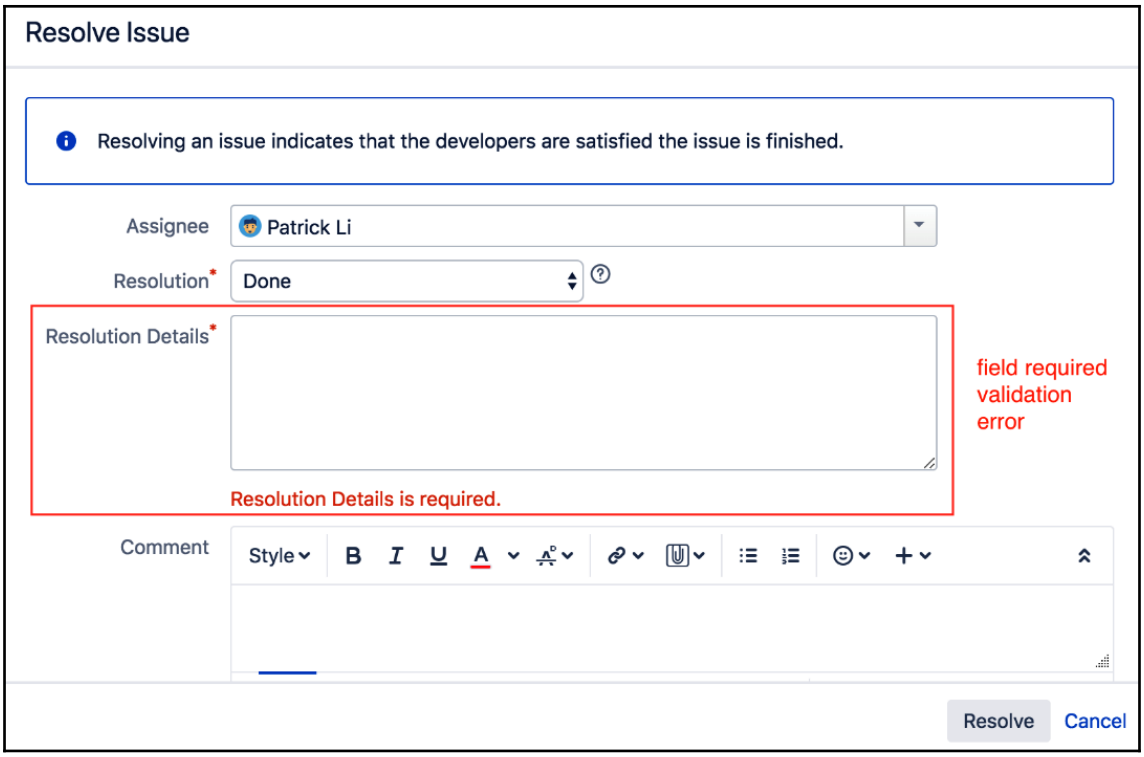

Screen: Resolve Issue Screen
Triggers 0
Conditions 1
Validators 0
Post Functions 5
A trigger is an event that initiates an automatic transition for a Jira issue. Examples of triggers include the creation of a pull request, the rejection of a code review, and more. Send feedback on triggers.
Caveats: Conditions, validators, and permissions will be ignored for automatic transitions. Global transitions can be automated with triggers, but please read our guide first.
Not sure where to start? Read our guide on configuring triggers.
Connect to Bitbucket, Stash, FishEye or Crucible to start using triggers.
Add trigger
Trigger
Details
Actions
There are no triggers currently defined.

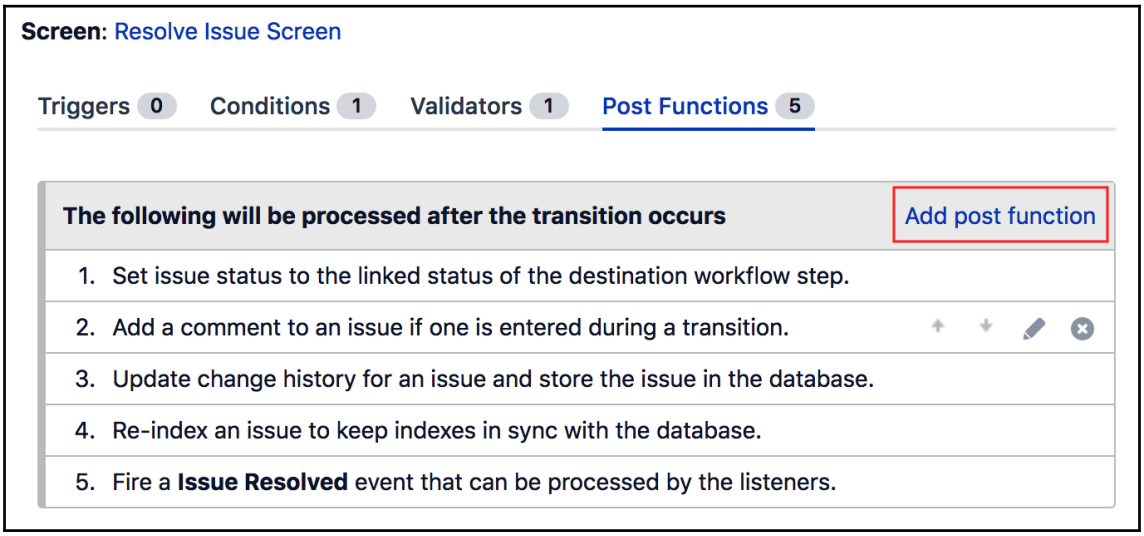

Screen: Resolve Issue Screen
Triggers 0
Conditions 1
Validators 0
Post Functions 5
All of the following conditions
Add condition
Only users with Resolve Issues permission can execute this transition.

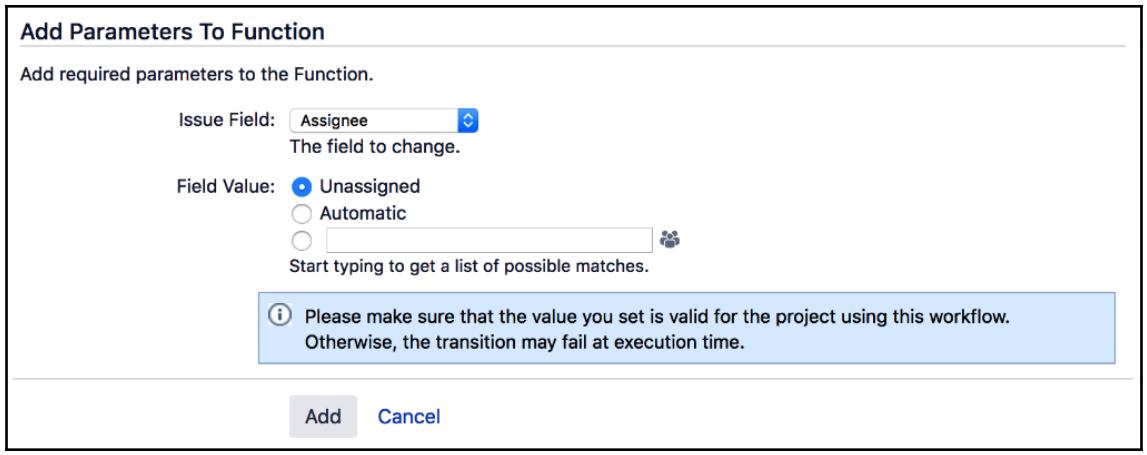

Add Parameters To Condition
Add required parameters to the Condition.
Group:
product-managers
The group membership to check.
Add
Cancel

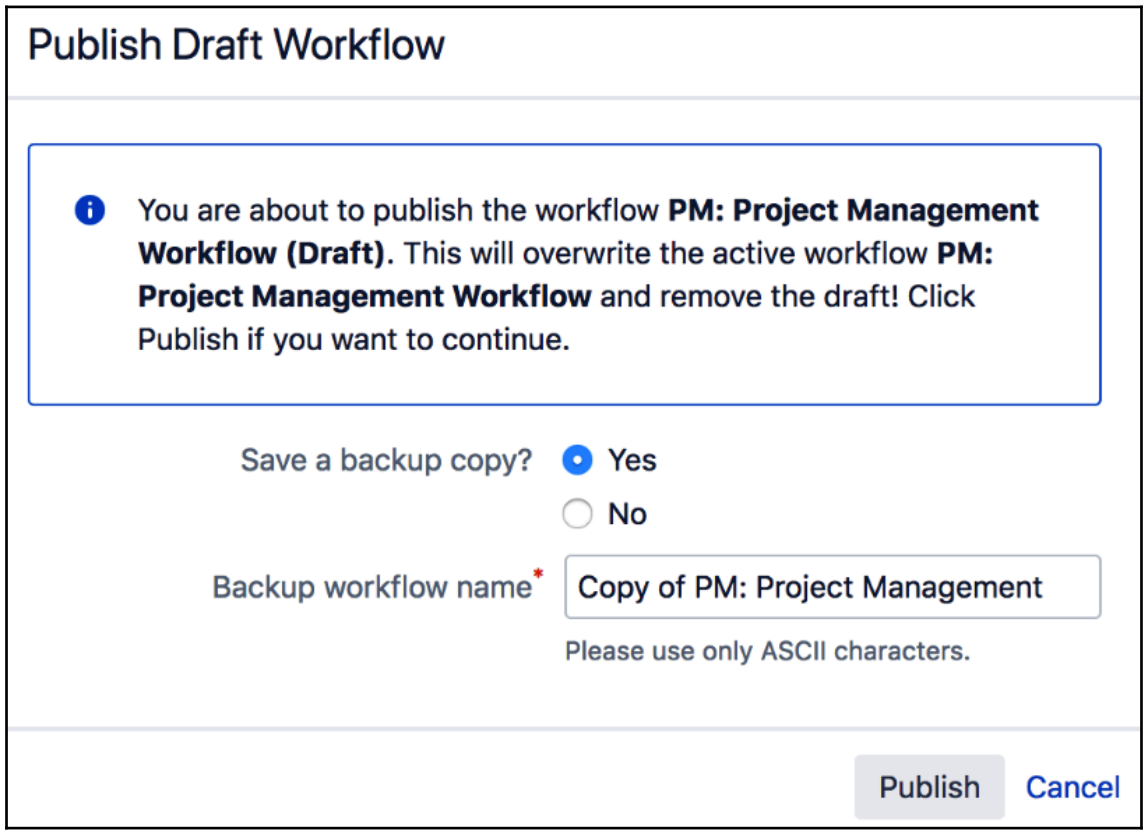

Screen: Resolve Issue Screen
Triggers 0
Conditions 1
Validators 1
Post Functions 5
The transition requires the following criteria to be valid
Add validator
Fields Required (JSU)
Required fields:
Resolution Details

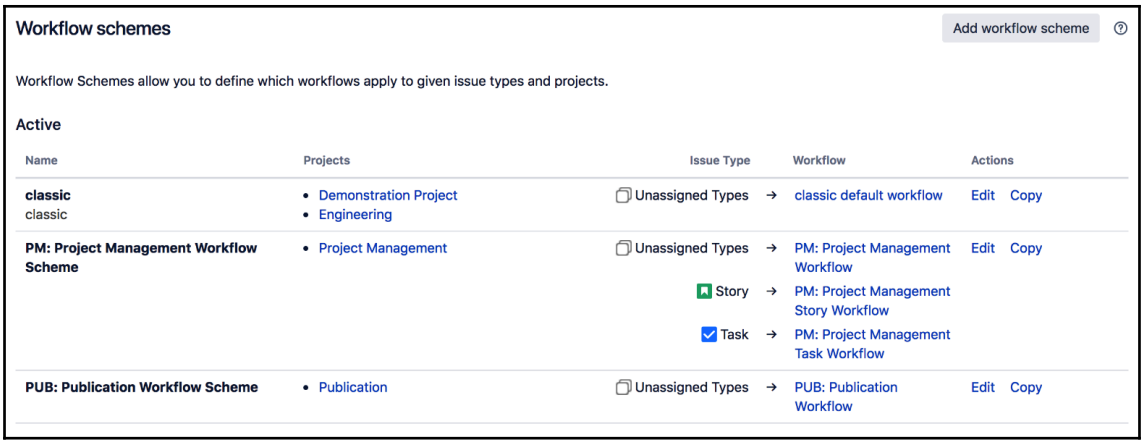

Add Parameters To Validator
Add required parameters to the Validator.
Fields required:
Available fields:
Last Day
Last Viewed
Original Estimate
Priority
Rank
Remaining Estimate
Reporter
Resolution
Resolved
Security Level
Required fields:
Resolution Details
Add >>
<< Remove
Error message (optional):
Display a customized error message. A default error message will be displayed if nothing is specified.
Ignore context:
If checked a field will be required by this checker, even if its context is not configured for the current issue.
For more information see the JSU Documentation.
Add
Cancel

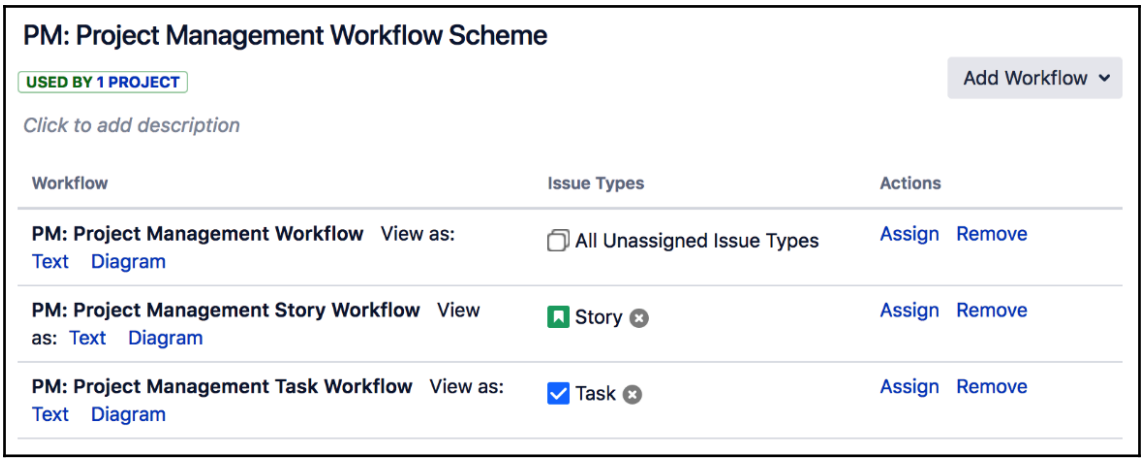

Resolve Issue
Resolving an issue indicates that the developers are satisfied the issue is finished.
Assignee
Patrick Li
Resolution*
Done
Resolution Details*
Resolution Details is required.
field required validation error
Comment
Style
Resolve
Cancel

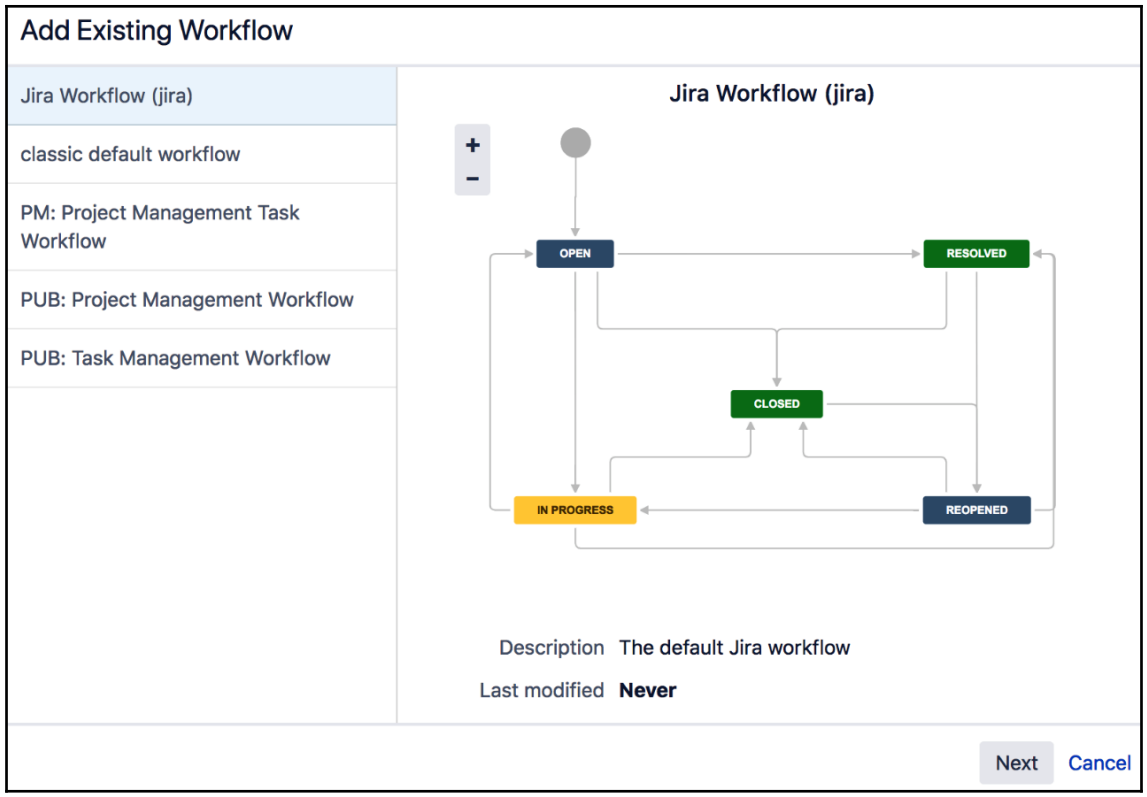

Screen: Resolve Issue Screen
Triggers 0
Conditions 1
Validators 1
Post Functions 5
The following will be processed after the transition occurs
Add post function
1. Set issue status to the linked status of the destination workflow step.
2. Add a comment to an issue if one is entered during a transition.
3. Update change history for an issue and store the issue in the database.
4. Re-index an issue to keep indexes in sync with the database.
5. Fire a Issue Resolved event that can be processed by the listeners.

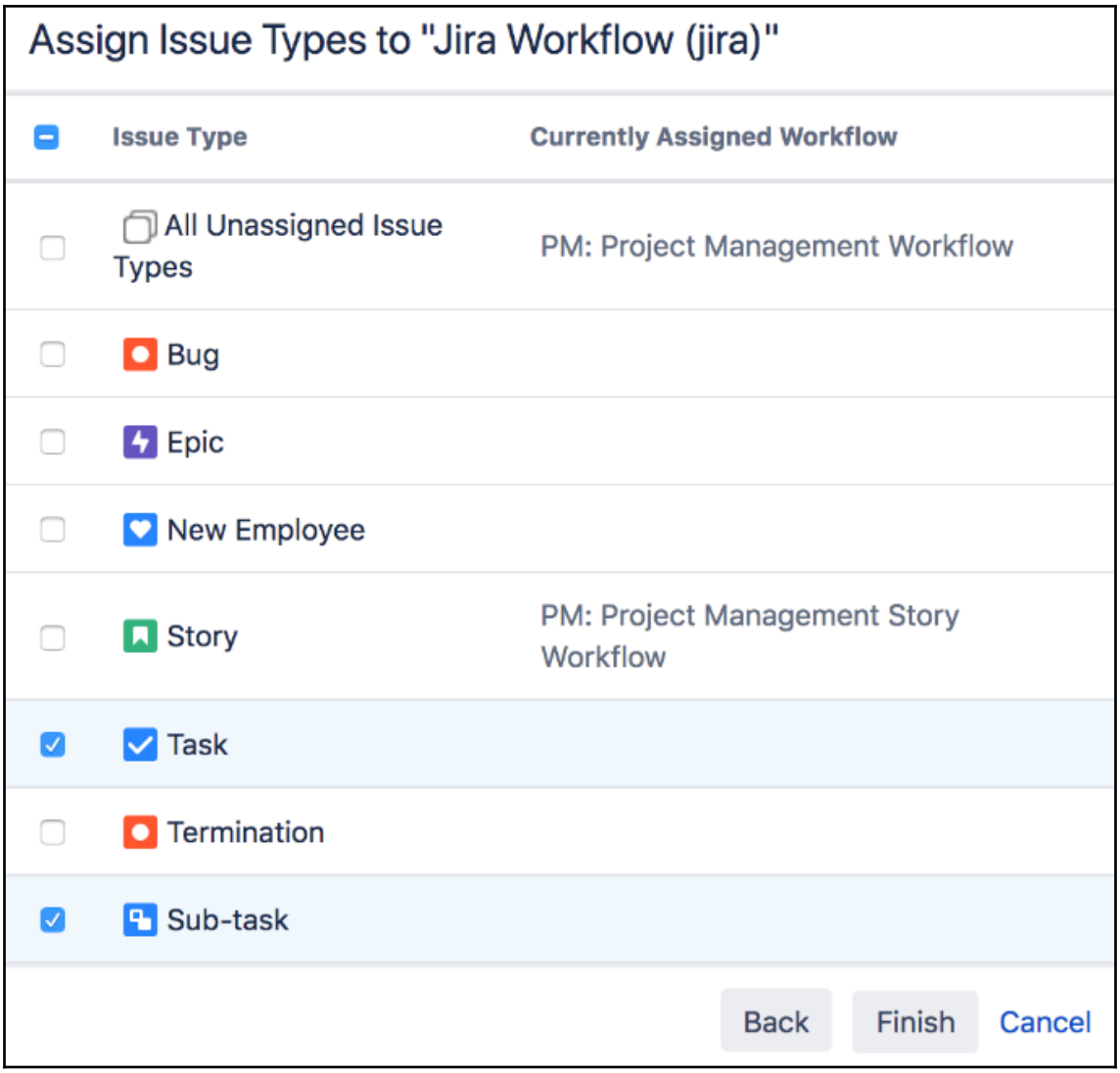

Add Parameters To Function
Add required parameters to the Function.
Issue Field:
Assignee
The field to change.
Field Value:
Unassigned
Automatic
Start typing to get a list of possible matches.
Please make sure that the value you set is valid for the project using this workflow.
Otherwise, the transition may fail at execution time.
Add
Cancel

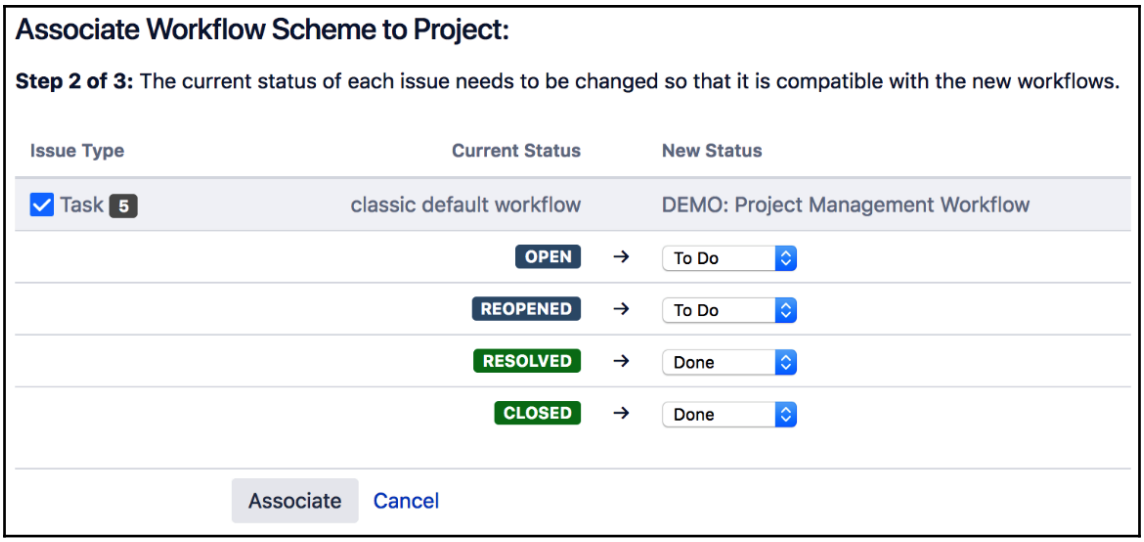

Publish Draft Workflow
You are about to publish the workflow PM: Project Management Workflow (Draft). This will overwrite the active workflow PM: Project Management Workflow and remove the draft! Click Publish if you want to continue.
Save a backup copy?
Yes
No
Backup workflow name*
Copy of PM: Project Management
Please use only ASCII characters.
Publish
Cancel

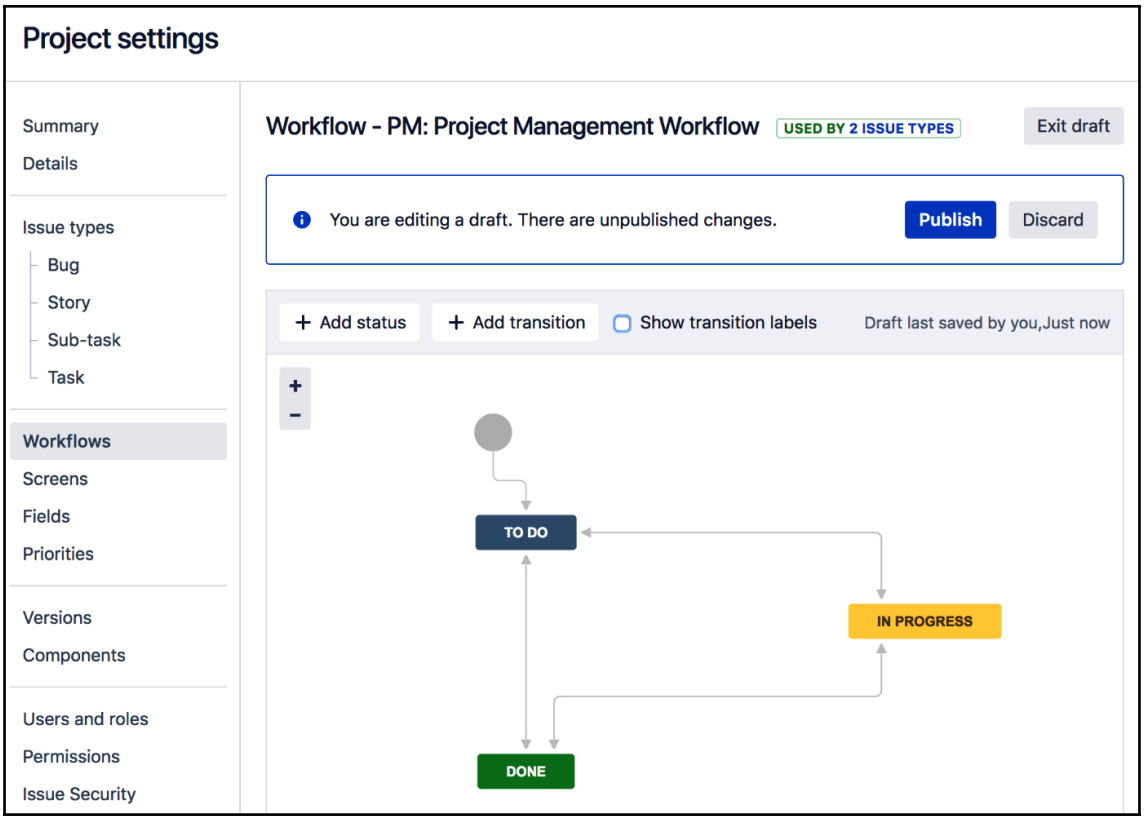

Workflow schemes
Add workflow scheme
Workflow Schemes allow you to define which workflows apply to given issue types and projects.
Active
Name
Projects
Issue Type
Workflow
Actions
classic
classic
Demonstration Project
Engineering
Unassigned Types → classic default workflow
Edit Copy
PM: Project Management Workflow Scheme
Project Management
Unassigned Types → PM: Project Management Workflow
Story → PM: Project Management Story Workflow
Task → PM: Project Management Task Workflow
Edit Copy
PUB: Publication Workflow Scheme
Publication
Unassigned Types → PUB: Publication Workflow
Edit Copy

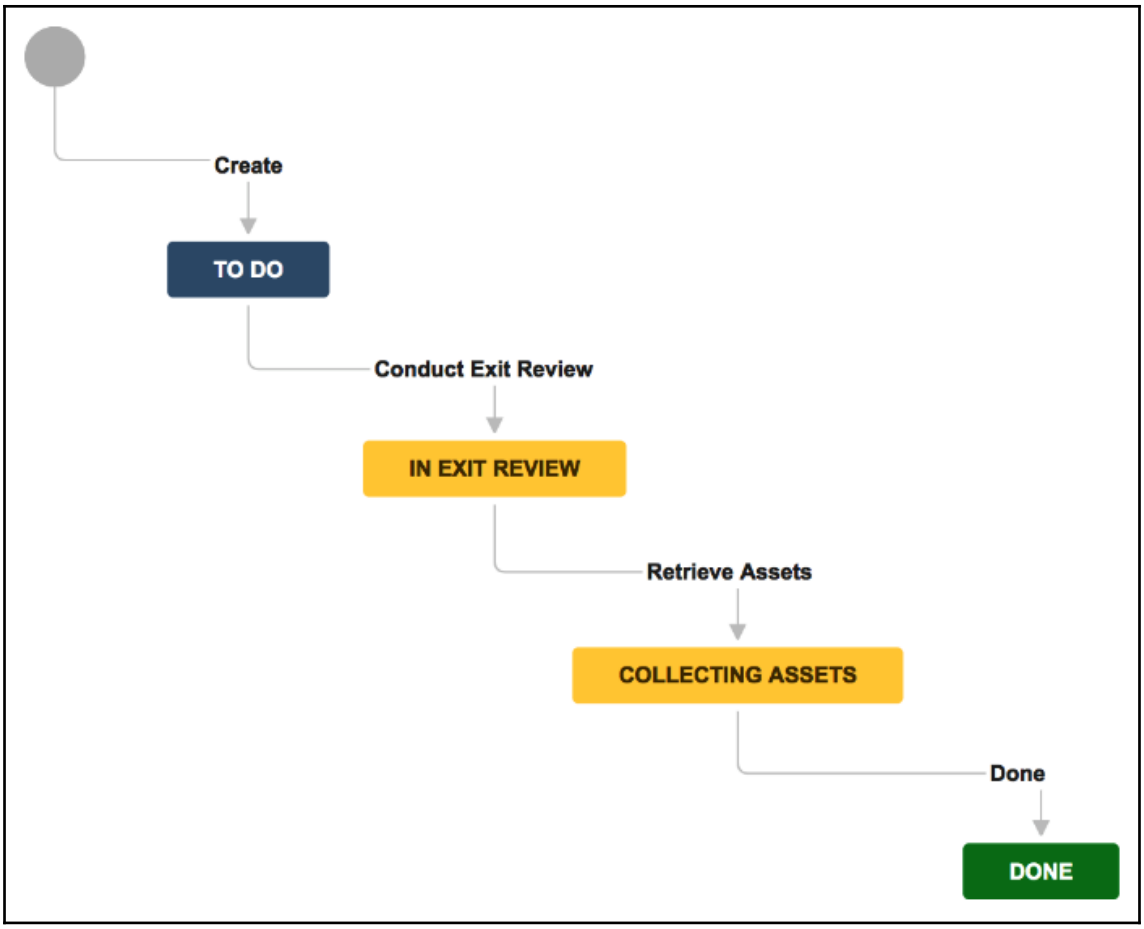

PM: Project Management Workflow Scheme
USED BY 1 PROJECT
Add Workflow
Click to add description
Workflow
Issue Types
Actions
PM: Project Management Workflow View as: Text Diagram
All Unassigned Issue Types
Assign Remove
PM: Project Management Story Workflow View as: Text Diagram
Story
Assign Remove
PM: Project Management Task Workflow View as: Text Diagram
Task
Assign Remove


Add Existing Workflow
Jira Workflow (jira)
classic default workflow
PM: Project Management Task Workflow
PUB: Project Management Workflow
PUB: Task Management Workflow
Jira Workflow (jira)
+
−
OPEN
RESOLVED
CLOSED
IN PROGRESS
REOPENED
Description The default Jira workflow
Last modified Never
Next
Cancel

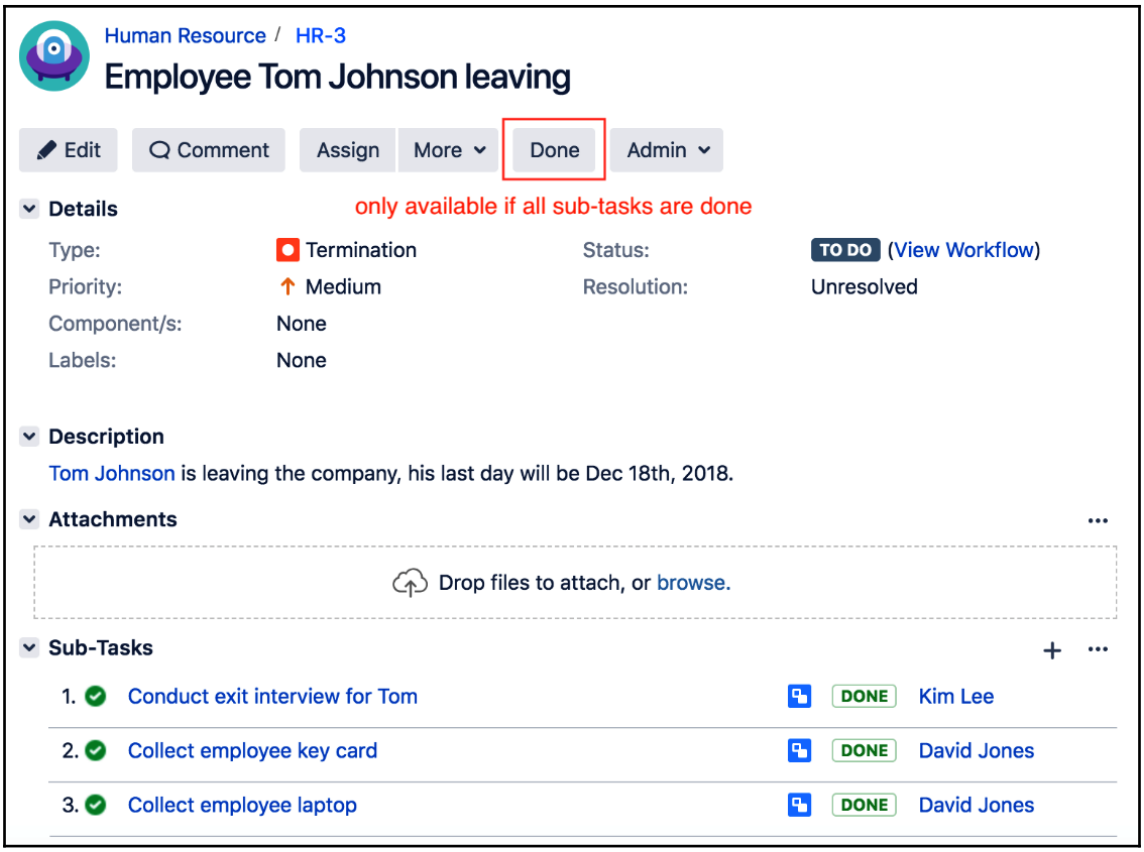

Assign Issue Types to "Jira Workflow (jira)"
Issue Type
Currently Assigned Workflow
All Unassigned Issue Types
PM: Project Management Workflow
Bug
Epic
New Employee
Story
PM: Project Management Story Workflow
Task
Termination
Sub-task
Back
Finish
Cancel


Associate Workflow Scheme to Project:
Step 2 of 3: The current status of each issue needs to be changed so that it is compatible with the new workflows.
Issue Type
Current Status
New Status
Task 5
classic default workflow
DEMO: Project Management Workflow
OPEN
To Do
REOPENED
To Do
RESOLVED
Done
CLOSED
Done
Associate
Cancel

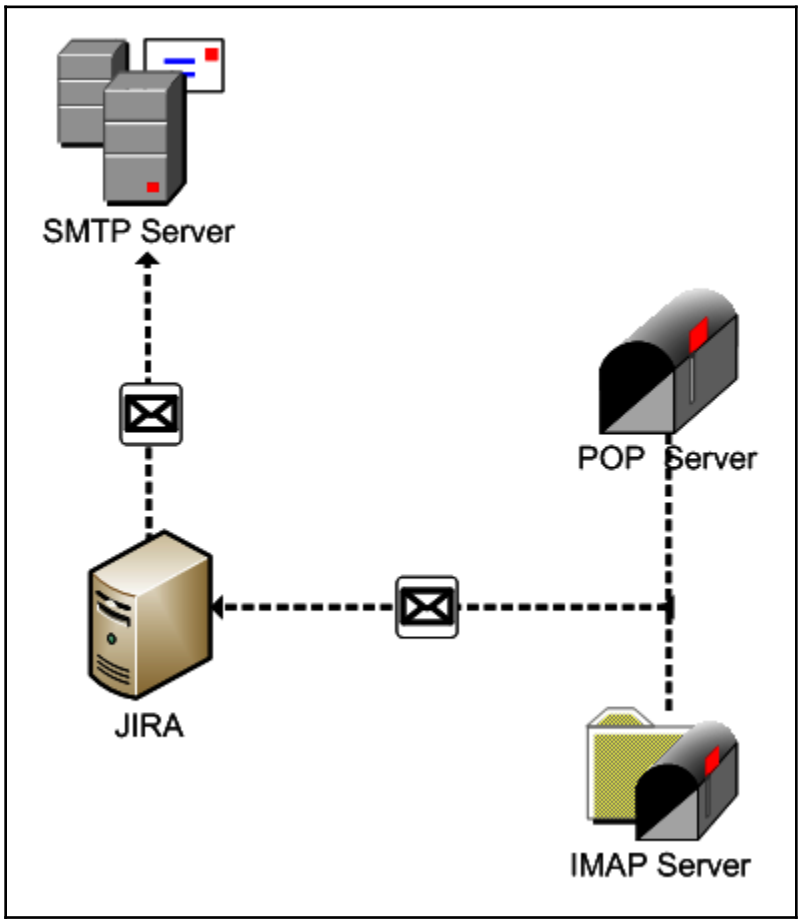

Project settings
Summary
Details
Issue types
Bug
Story
Sub-task
Task
Workflows
Screens
Fields
Priorities
Versions
Components
Users and roles
Permissions
Issue Security
Workflow - PM: Project Management Workflow
USED BY 2 ISSUE TYPES
Exit draft
You are editing a draft. There are unpublished changes.
Publish
Discard
Add status
Add transition
Show transition labels
Draft last saved by you,Just now
TO DO
IN PROGRESS
DONE

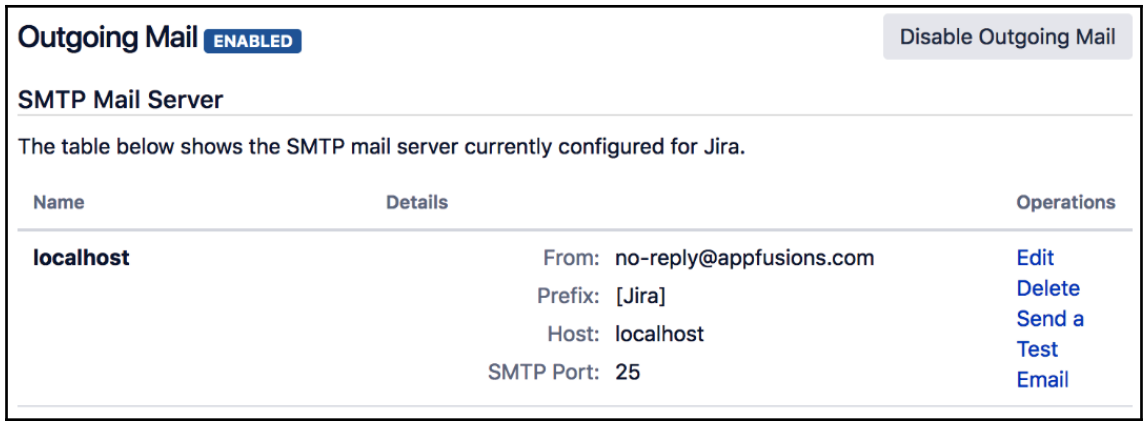

Create
TO DO
Conduct Exit Review
IN EXIT REVIEW
Retrieve Assets
COLLECTING ASSETS
Done
DONE

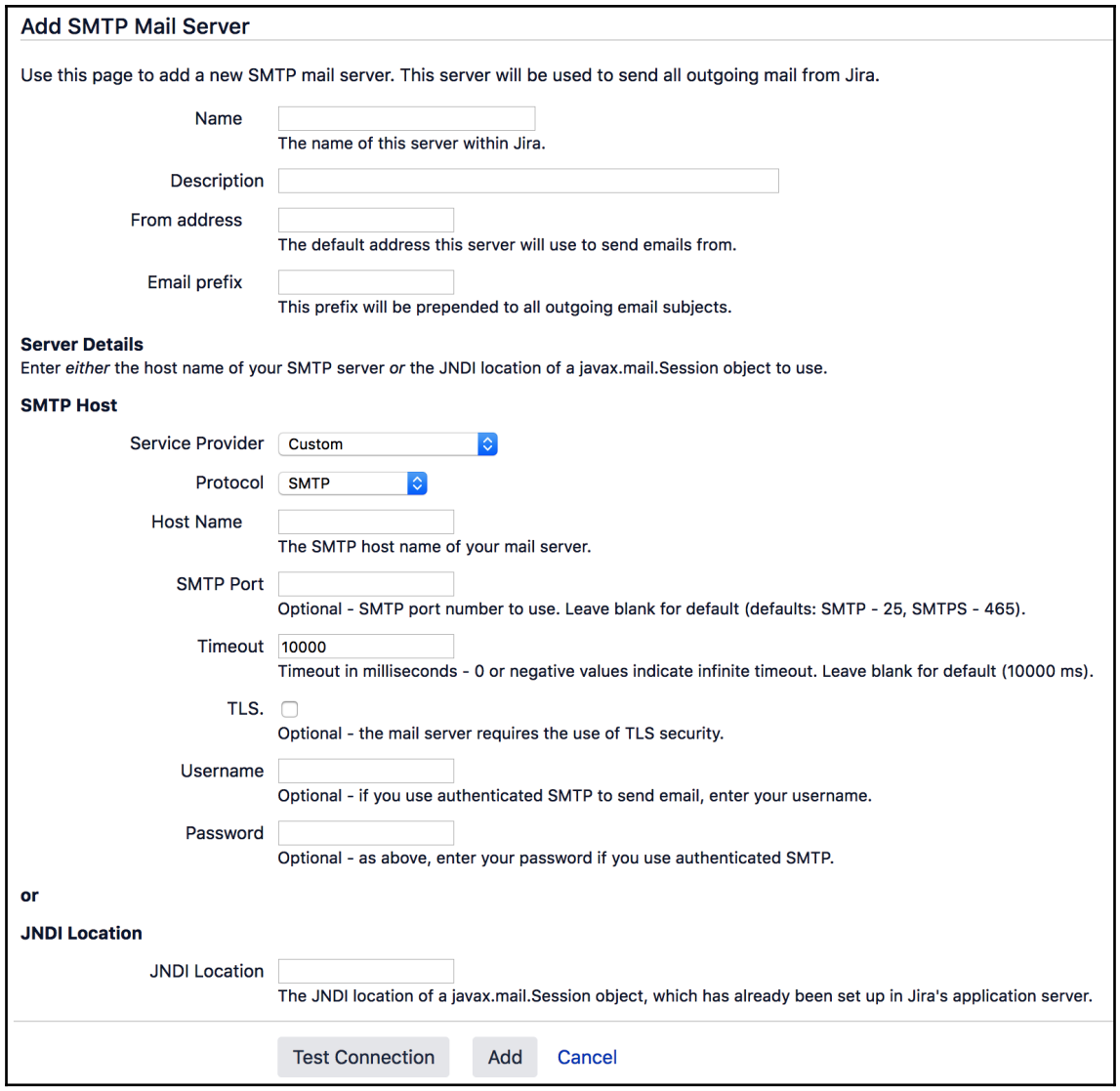
Human Resource / HR-3
Employee Tom Johnson leaving
Edit
Comment
Assign
More
Conduct Exit Review
Admin
Details
Type:
Termination
Status:
TO DO
(View Workflow)
Priority:
Medium
Resolution:
Unresolved
Component/s:
None
Labels:
None
Description
Tom Johnson is leaving the company, his last day will be Dec 18th, 2018.

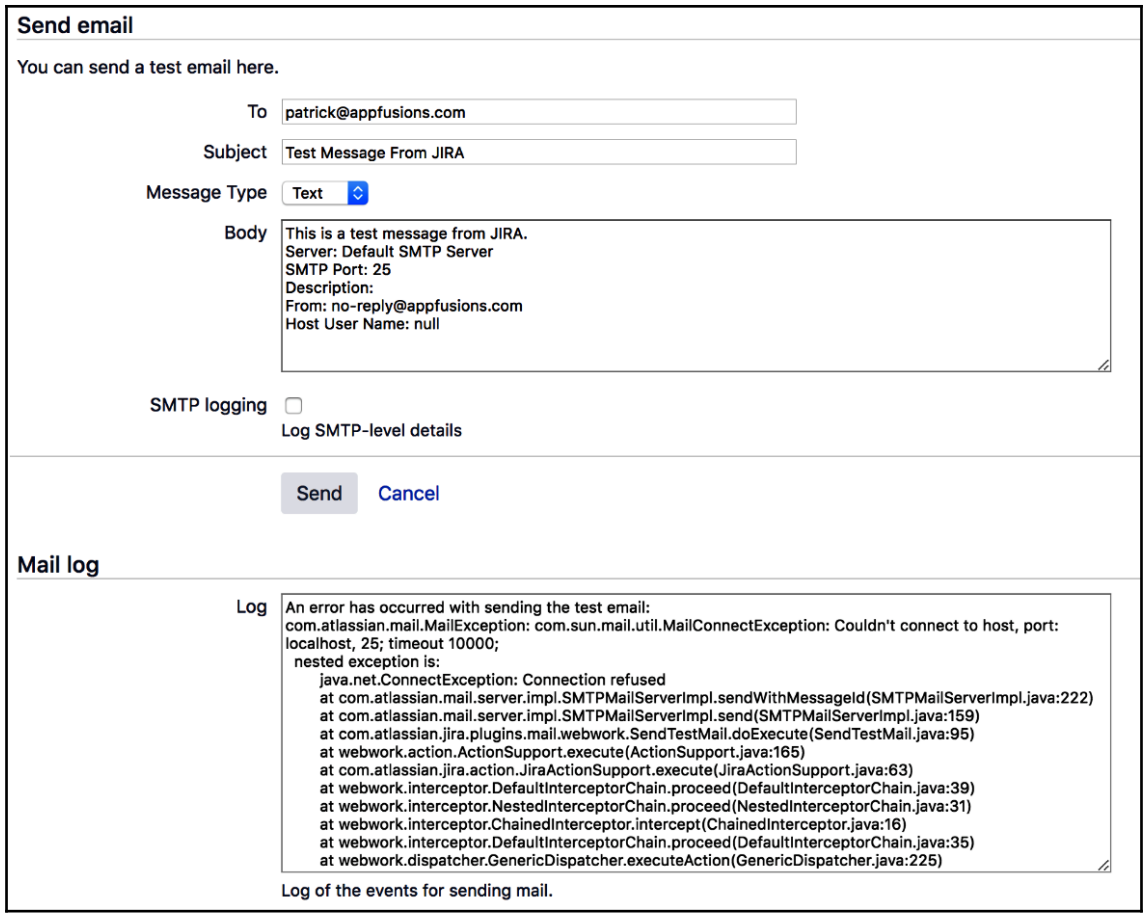

Human Resource / HR-3
Employee Tom Johnson leaving
Edit
Comment
Assign
More
Done
Admin
only available if all sub-tasks are done
Details
Type:
Termination
Status:
TO DO
(View Workflow)
Priority:
Medium
Resolution:
Unresolved
Component/s:
None
Labels:
None
Description
Tom Johnson is leaving the company, his last day will be Dec 18th, 2018.
Attachments
Drop files to attach, or browse.
Sub-Tasks
1. Conduct exit interview for Tom
DONE
Kim Lee
2. Collect employee key card
DONE
David Jones
3. Collect employee laptop
DONE
David Jones

Chapter 8: Emails and Notifications




Outgoing Mail ENABLED
Disable Outgoing Mail
SMTP Mail Server
The table below shows the SMTP mail server currently configured for Jira.
Name
Details
Operations
localhost
From: no-reply@appfusions.com
Prefix: [Jira]
Host: localhost
SMTP Port: 25
Edit
Delete
Send a Test Email


Add SMTP Mail Server
Use this page to add a new SMTP mail server. This server will be used to send all outgoing mail from Jira.
Name
The name of this server within Jira.
Description
From address
The default address this server will use to send emails from.
Email prefix
This prefix will be prepended to all outgoing email subjects.
Server Details
Enter either the host name of your SMTP server or the JNDI location of a javax.mail.Session object to use.
SMTP Host
Service Provider
Custom
Protocol
SMTP
Host Name
The SMTP host name of your mail server.
SMTP Port
Optional - SMTP port number to use. Leave blank for default (defaults: SMTP - 25, SMTPS - 465).
Timeout
10000
Timeout in milliseconds - 0 or negative values indicate infinite timeout. Leave blank for default (10000 ms).
TLS.
Optional - the mail server requires the use of TLS security.
Username
Optional - if you use authenticated SMTP to send email, enter your username.
Password
Optional - as above, enter your password if you use authenticated SMTP.
or
JNDI Location
JNDI Location
The JNDI location of a javax.mail.Session object, which has already been set up in Jira's application server.
Test Connection
Add
Cancel


Send email
You can send a test email here.
To
patrick@appfusions.com
Subject
Test Message From JIRA
Message Type
Text
Body
This is a test message from JIRA.
Server: Default SMTP Server
SMTP Port: 25
Description:
From: no-reply@appfusions.com
Host User Name: null
SMTP logging
Log SMTP-level details
Send
Cancel
Mail log
Log
An error has occurred with sending the test email:
com.atlassian.mail.MailException: com.sun.mail.util.MailConnectException: Couldn't connect to host, port: localhost, 25; timeout 10000;
nested exception is:
java.net.ConnectException: Connection refused
at com.atlassian.mail.server.impl.SMTPMailServerImpl.sendWithMessageId(SMTPMailServerImpl.java:222)
at com.atlassian.mail.server.impl.SMTPMailServerImpl.send(SMTPMailServerImpl.java:159)
at com.atlassian.jira.plugins.mail.webwork.SendTestMail.doExecute(SendTestMail.java:95)
at webwork.action.ActionSupport.execute(ActionSupport.java:165)
at com.atlassian.jira.action.JiraActionSupport.execute(JiraActionSupport.java:63)
at webwork.interceptor.DefaultInterceptorChain.proceed(DefaultInterceptorChain.java:39)
at webwork.interceptor.NestedInterceptorChain.proceed(NestedInterceptorChain.java:31)
at webwork.interceptor.ChainedInterceptor.intercept(ChainedInterceptor.java:16)
at webwork.interceptor.DefaultInterceptorChain.proceed(DefaultInterceptorChain.java:35)
at webwork.dispatcher.GenericDispatcher.executeAction(GenericDispatcher.java:225)
Log of the events for sending mail.

Mail queue

This page shows you the current Jira internal event queue, whose events may trigger notification emails.

The queue currently has **3** items in it.

Flush mail queue - this will send all mail in the queue immediately.

Mail queue (3) | Error queue (0)

Subject	Queued
(DEMO-5) Keyboard shortcuts	22/Dec/18 5:51 PM
(DEMO-3) Editing tasks	22/Dec/18 5:51 PM
(DEMO-4) Searching for information	22/Dec/18 5:51 PM

Send email

You can send an email to Jira users here.

Please select one or more groups or project roles from the list below. The email message will be sent to all members of the chosen groups or project roles.
Note: a user will receive the email only once, even if they are a member of more than one group or project role.

From: no-reply@appfusions.com

To: ○ Project Roles ◉ Groups

Groups:
jira-administrators
jira-software-users
product-managers

Reply To: no-reply@company.com
Optionally, specify the 'Reply-To' address.

Subject: Jira maintenance notification

Body:

Hi everyone,

Jira will be taken down today after 5PM PST for maintenance. The expected outage will be around 1 hour. Please make sure you save all your work to avoid any loss of data.

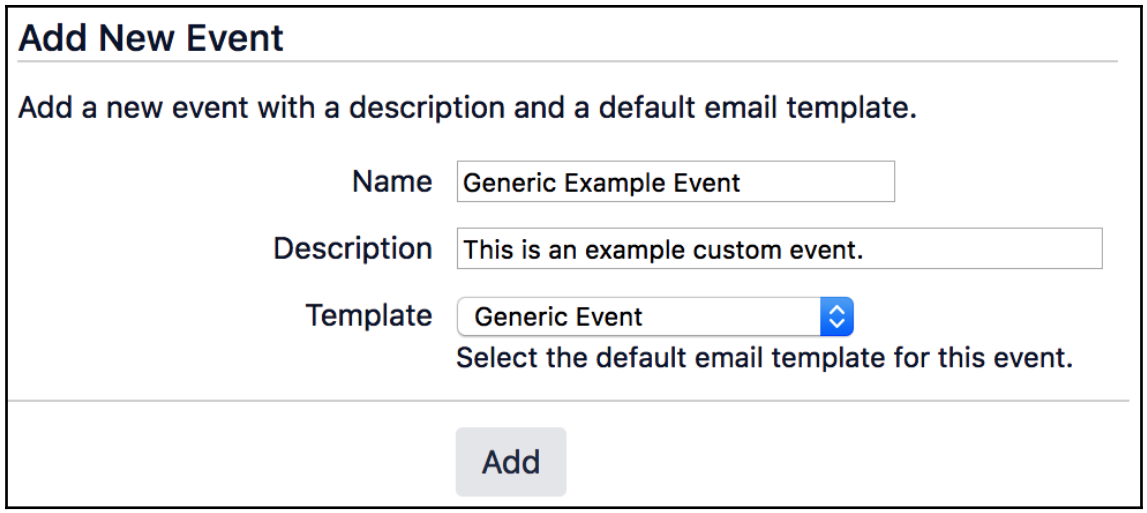
IT team

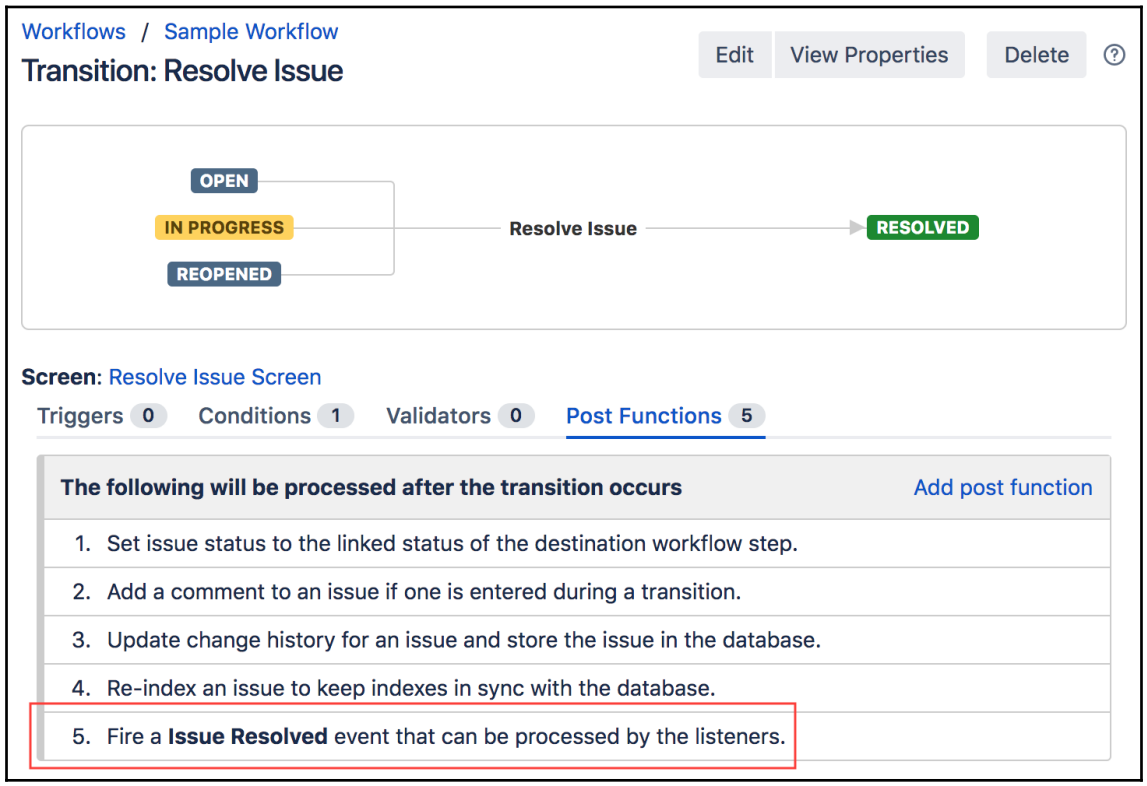
The body of the email message. You may include HTML.

Message Type: HTML
The content-type of the email message.

Bcc: ☑
Check this box if you want to hide the users email address.

Send Cancel


Add New Event
Add a new event with a description and a default email template.
Name
Generic Example Event
Description
This is an example custom event.
Template
Generic Event
Select the default email template for this event.
Add

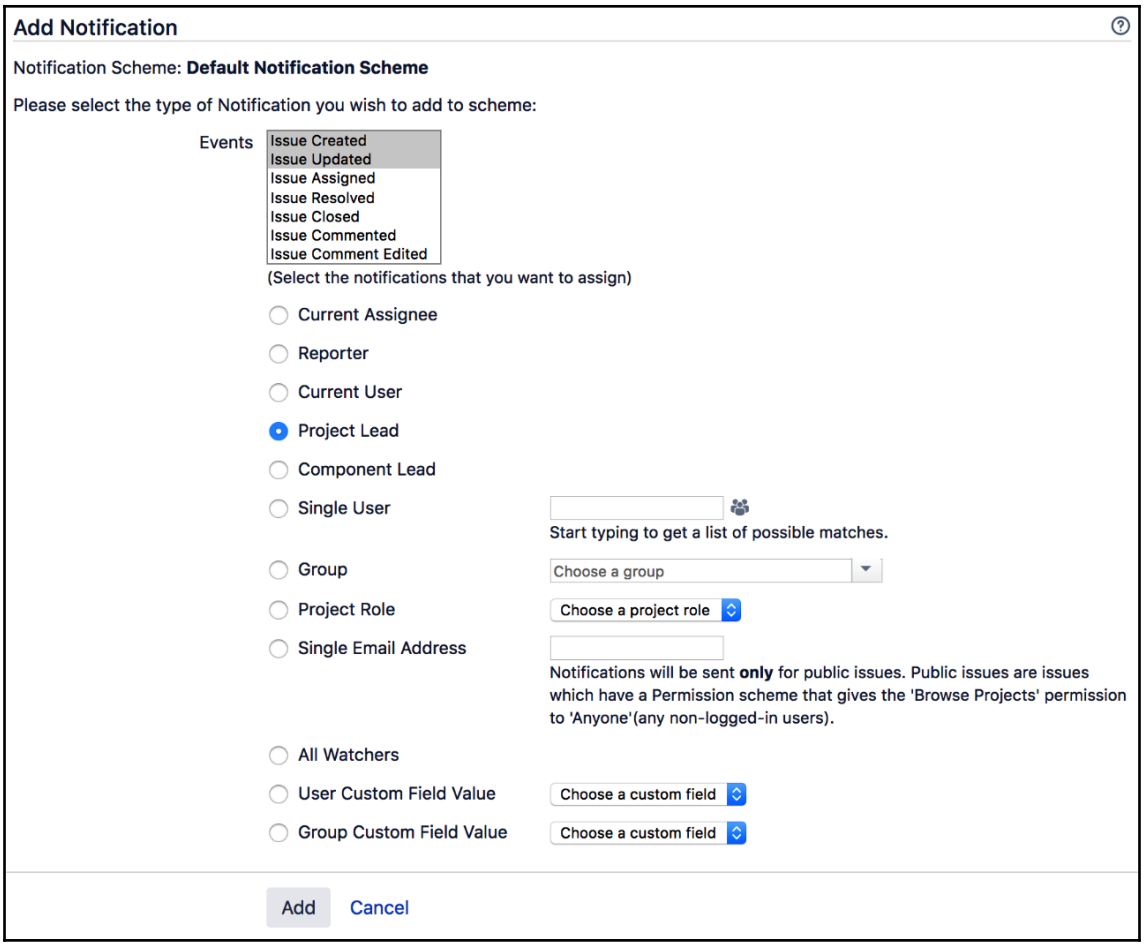

Workflows / Sample Workflow
Transition: Resolve Issue
Edit
View Properties
Delete
OPEN
IN PROGRESS
REOPENED
Resolve Issue
RESOLVED
Screen: Resolve Issue Screen
Triggers 0
Conditions 1
Validators 0
Post Functions 5
The following will be processed after the transition occurs
Add post function
1. Set issue status to the linked status of the destination workflow step.
2. Add a comment to an issue if one is entered during a transition.
3. Update change history for an issue and store the issue in the database.
4. Re-index an issue to keep indexes in sync with the database.
5. Fire a Issue Resolved event that can be processed by the listeners.

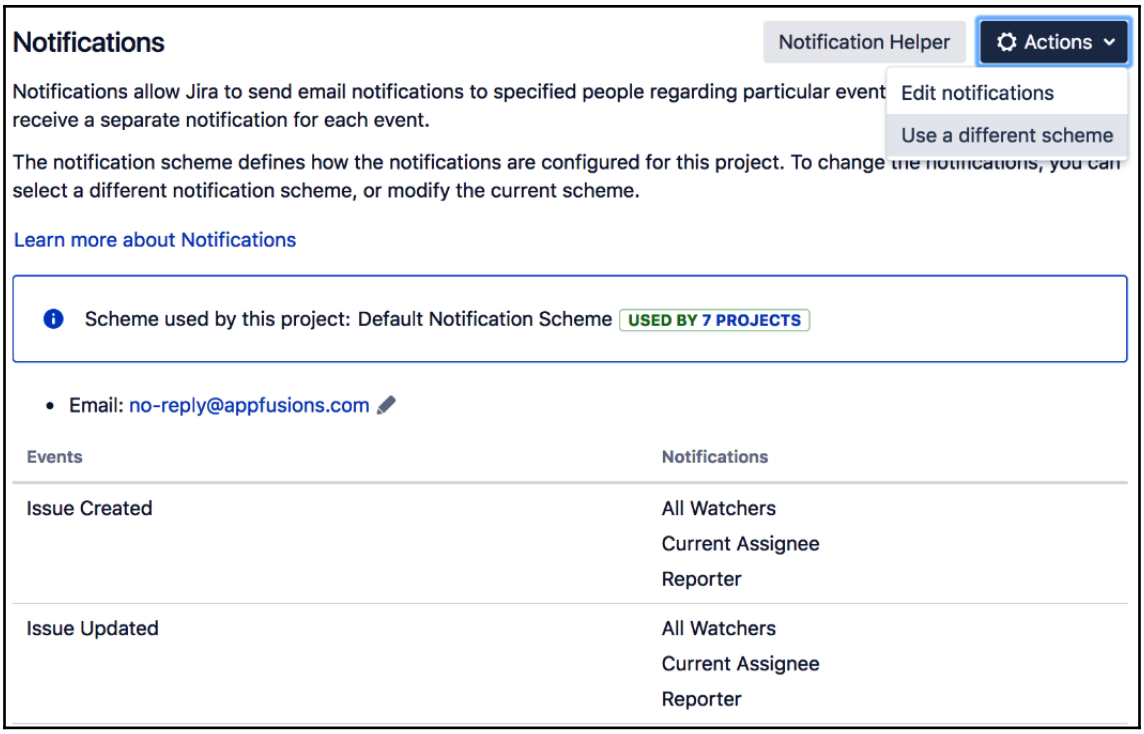
Notification Schemes

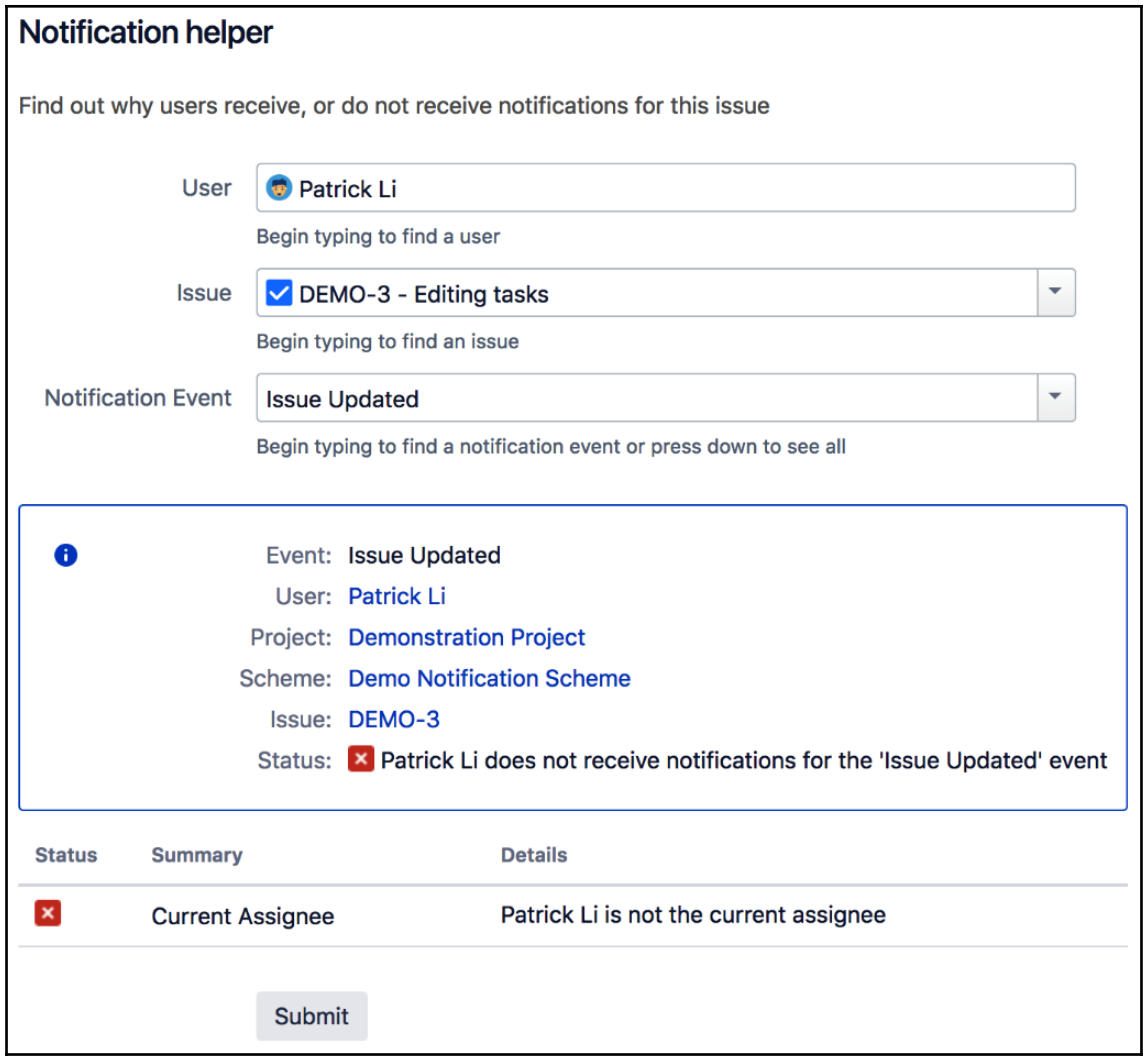
The table below shows the notification schemes currently configured for this server

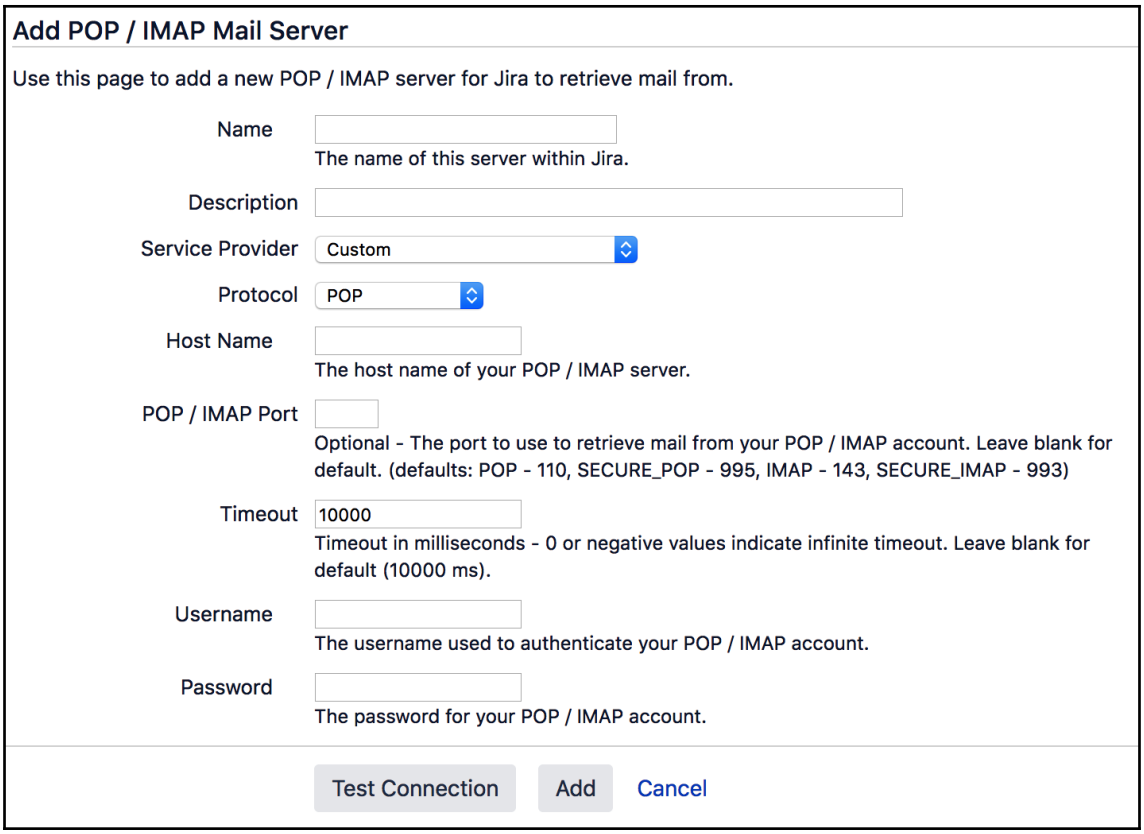
Name	Projects	Actions
Default Notification Scheme	• Engineering • Project Management • Sales	Notifications Copy Edit Delete
Demo Notification Scheme	• Demonstration Project	Notifications Copy Edit Delete
Publication Notification Scheme	• Publication	Notifications Copy Edit Delete

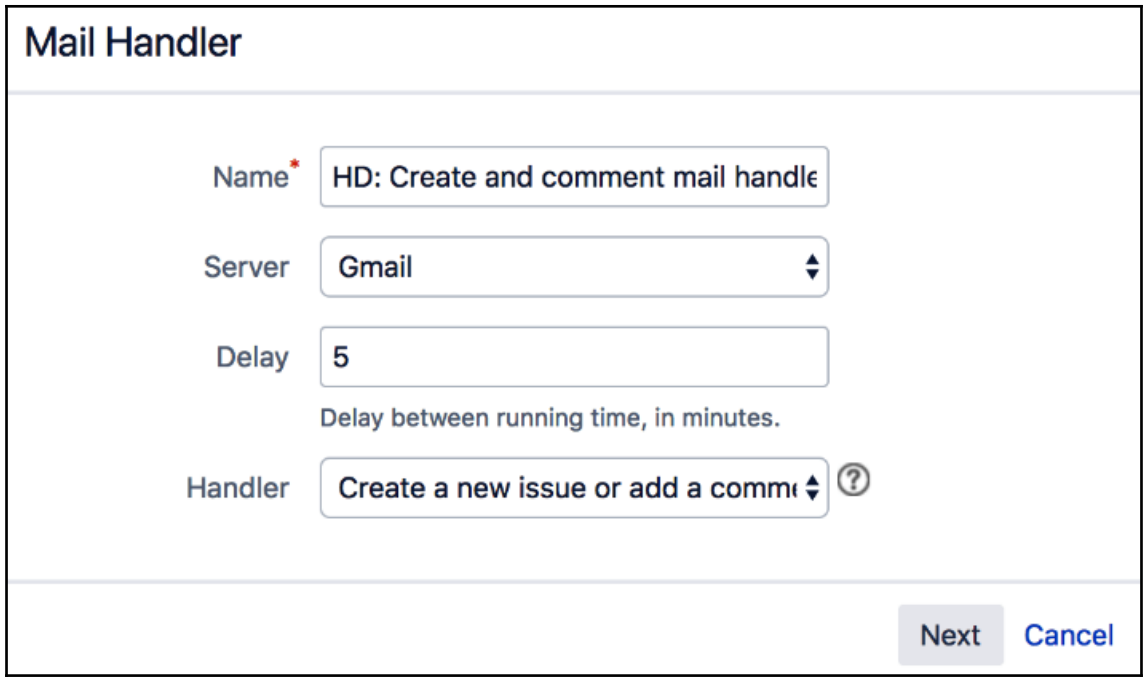
Add notification scheme

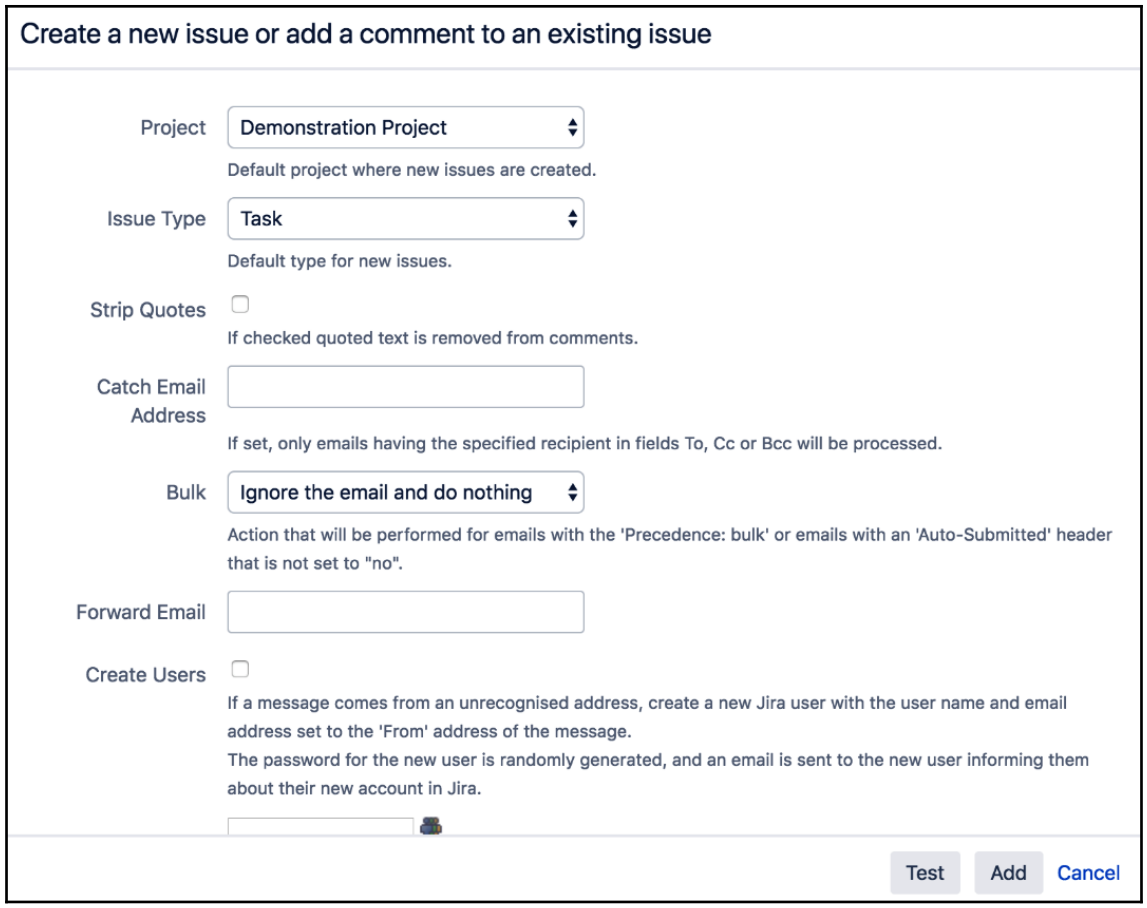

Add Notification
Notification Scheme: Default Notification Scheme
Please select the type of Notification you wish to add to scheme:
Events
Issue Created
Issue Updated
Issue Assigned
Issue Resolved
Issue Closed
Issue Commented
Issue Comment Edited
(Select the notifications that you want to assign)
Current Assignee
Reporter
Current User
Project Lead
Component Lead
Single User
Start typing to get a list of possible matches.
Group
Choose a group
Project Role
Choose a project role
Single Email Address
Notifications will be sent only for public issues. Public issues are issues which have a Permission scheme that gives the 'Browse Projects' permission to 'Anyone'(any non-logged-in users).
All Watchers
User Custom Field Value
Choose a custom field
Group Custom Field Value
Choose a custom field
Add
Cancel


Notifications
Notification Helper
Actions
Edit notifications
Use a different scheme
Notifications allow Jira to send email notifications to specified people regarding particular event
receive a separate notification for each event.
The notification scheme defines how the notifications are configured for this project. To change the notifications, you can
select a different notification scheme, or modify the current scheme.
Learn more about Notifications
Scheme used by this project: Default Notification Scheme
USED BY 7 PROJECTS
Email: no-reply@appfusions.com
Events
Notifications
Issue Created
All Watchers
Current Assignee
Reporter
Issue Updated
All Watchers
Current Assignee
Reporter

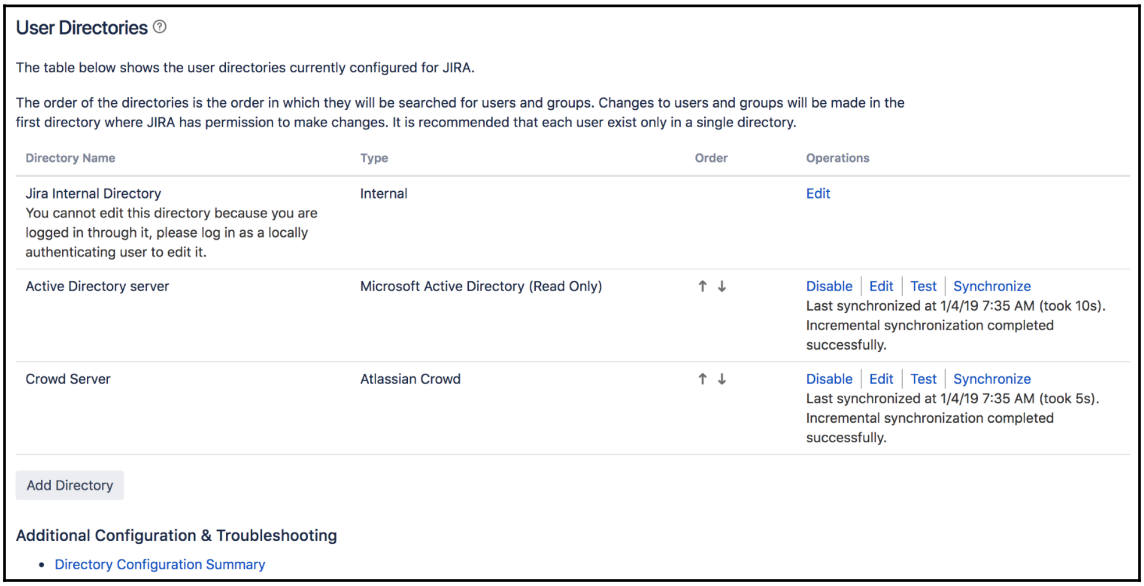

Notification helper
Find out why users receive, or do not receive notifications for this issue
User
Patrick Li
Begin typing to find a user
Issue
DEMO-3 - Editing tasks
Begin typing to find an issue
Notification Event
Issue Updated
Begin typing to find a notification event or press down to see all
Event: Issue Updated
User: Patrick Li
Project: Demonstration Project
Scheme: Demo Notification Scheme
Issue: DEMO-3
Status: Patrick Li does not receive notifications for the 'Issue Updated' event
Status
Summary
Details
Current Assignee
Patrick Li is not the current assignee
Submit

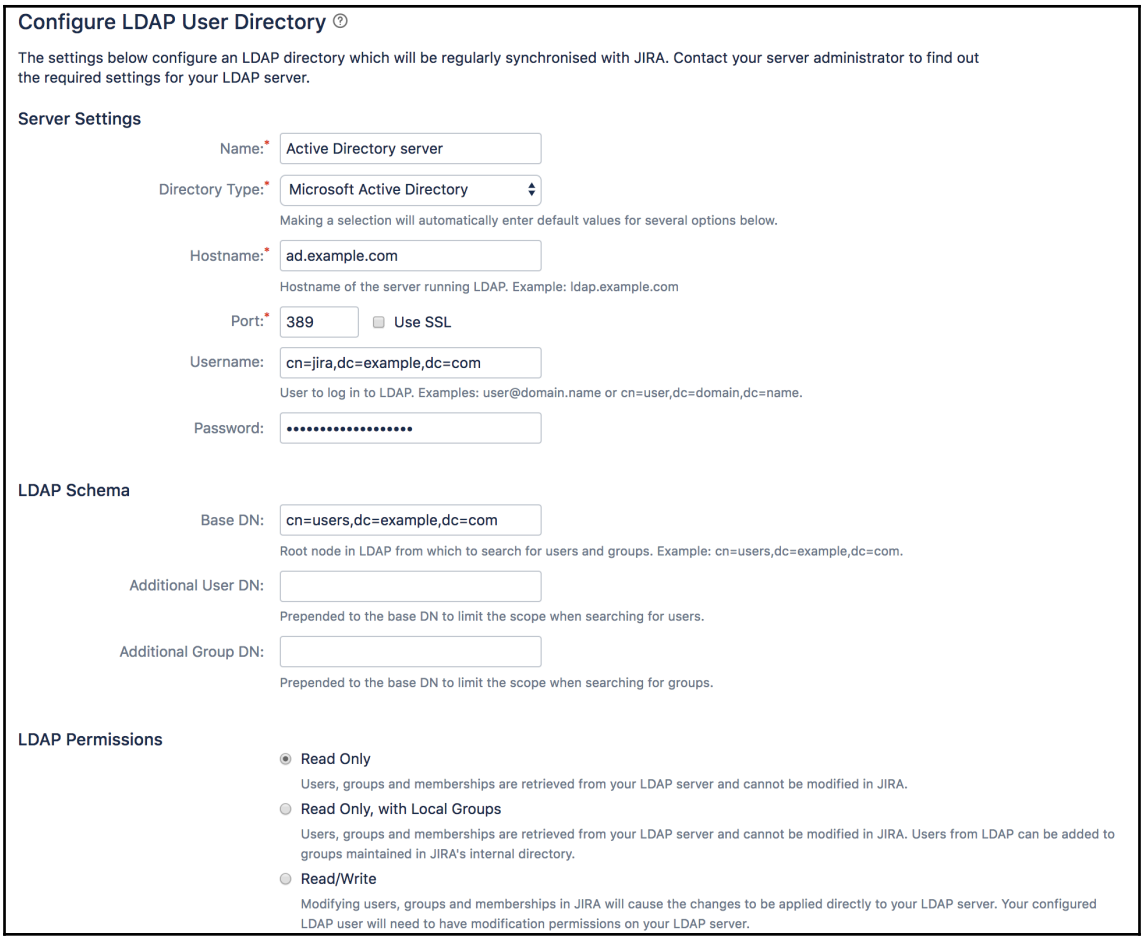

Add POP / IMAP Mail Server
Use this page to add a new POP / IMAP server for Jira to retrieve mail from.
Name
The name of this server within Jira.
Description
Service Provider
Custom
Protocol
POP
Host Name
The host name of your POP / IMAP server.
POP / IMAP Port
Optional - The port to use to retrieve mail from your POP / IMAP account. Leave blank for default. (defaults: POP - 110, SECURE_POP - 995, IMAP - 143, SECURE_IMAP - 993)
Timeout
10000
Timeout in milliseconds - 0 or negative values indicate infinite timeout. Leave blank for default (10000 ms).
Username
The username used to authenticate your POP / IMAP account.
Password
The password for your POP / IMAP account.
Test Connection
Add
Cancel

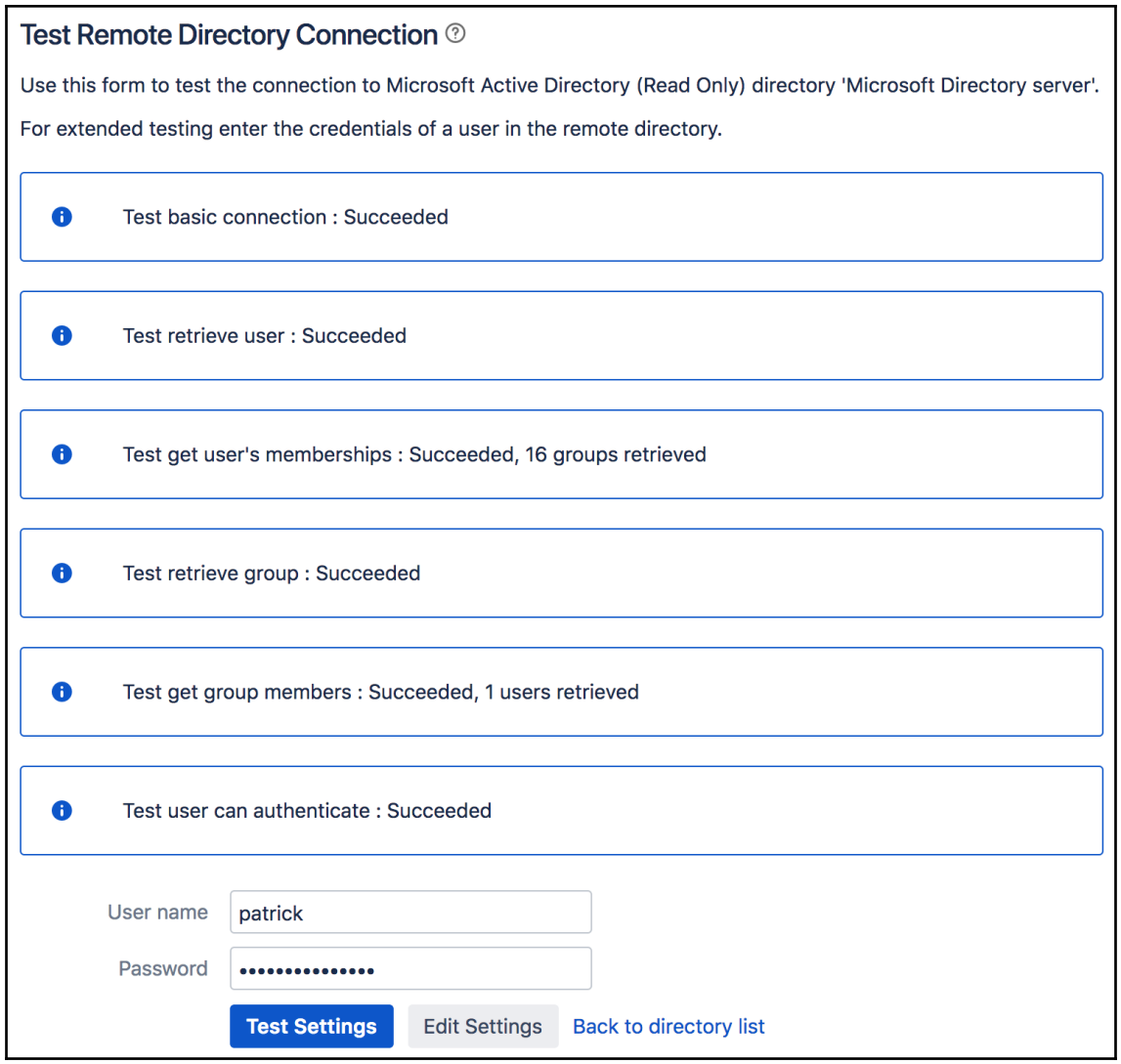

Mail Handler
Name*
HD: Create and comment mail handle
Server
Gmail
Delay
5
Delay between running time, in minutes.
Handler
Create a new issue or add a comm
Next
Cancel

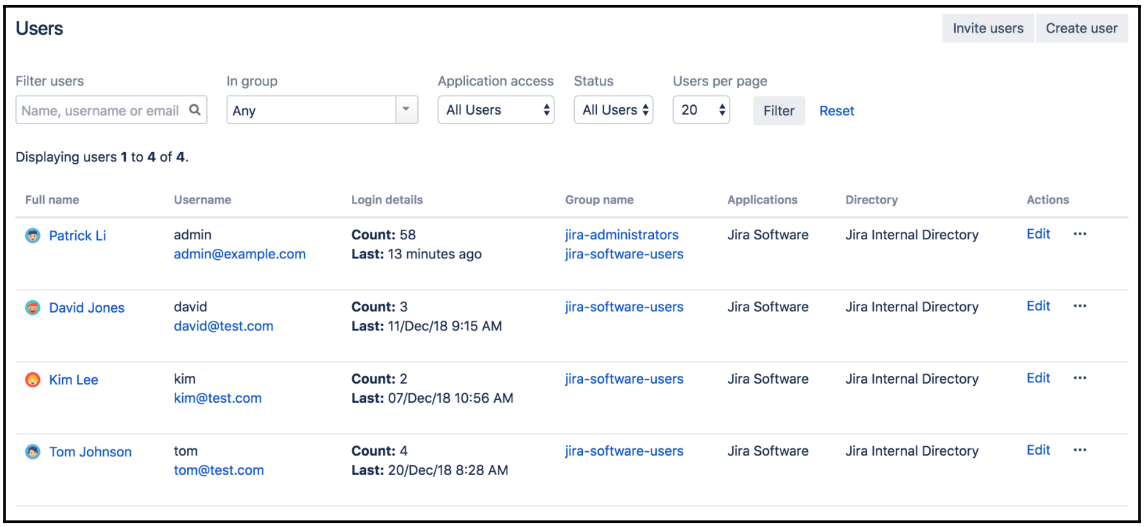

Create a new issue or add a comment to an existing issue
Project
Demonstration Project
Default project where new issues are created.
Issue Type
Task
Default type for new issues.
Strip Quotes
If checked quoted text is removed from comments.
Catch Email Address
If set, only emails having the specified recipient in fields To, Cc or Bcc will be processed.
Bulk
Ignore the email and do nothing
Action that will be performed for emails with the 'Precedence: bulk' or emails with an 'Auto-Submitted' header that is not set to "no".
Forward Email
Create Users
If a message comes from an unrecognised address, create a new Jira user with the user name and email address set to the 'From' address of the message.
The password for the new user is randomly generated, and an email is sent to the new user informing them about their new account in Jira.
Test
Add
Cancel

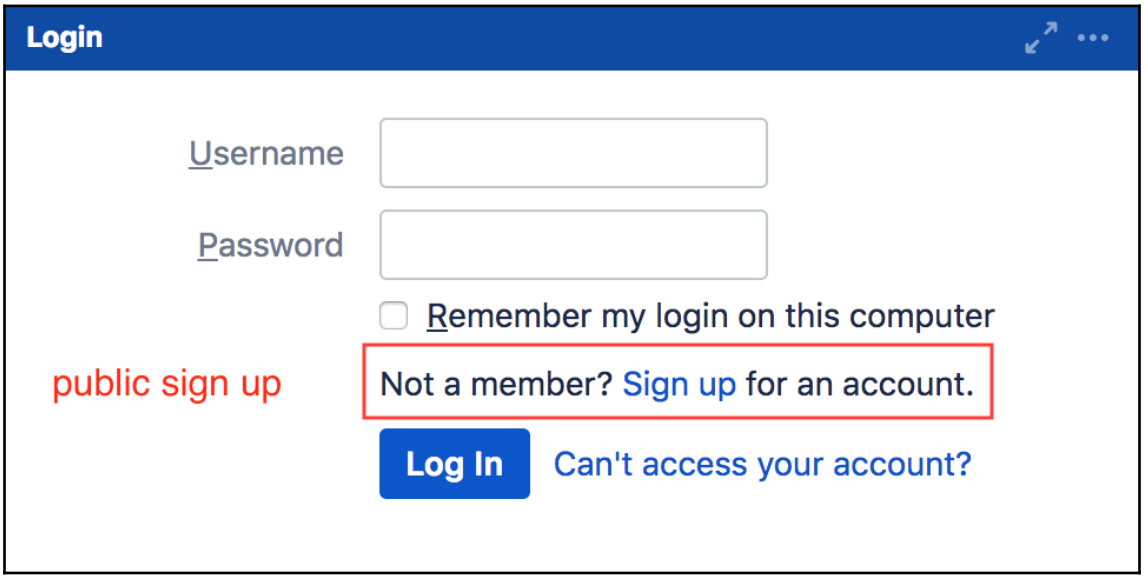
Chapter 9: Securing Jira



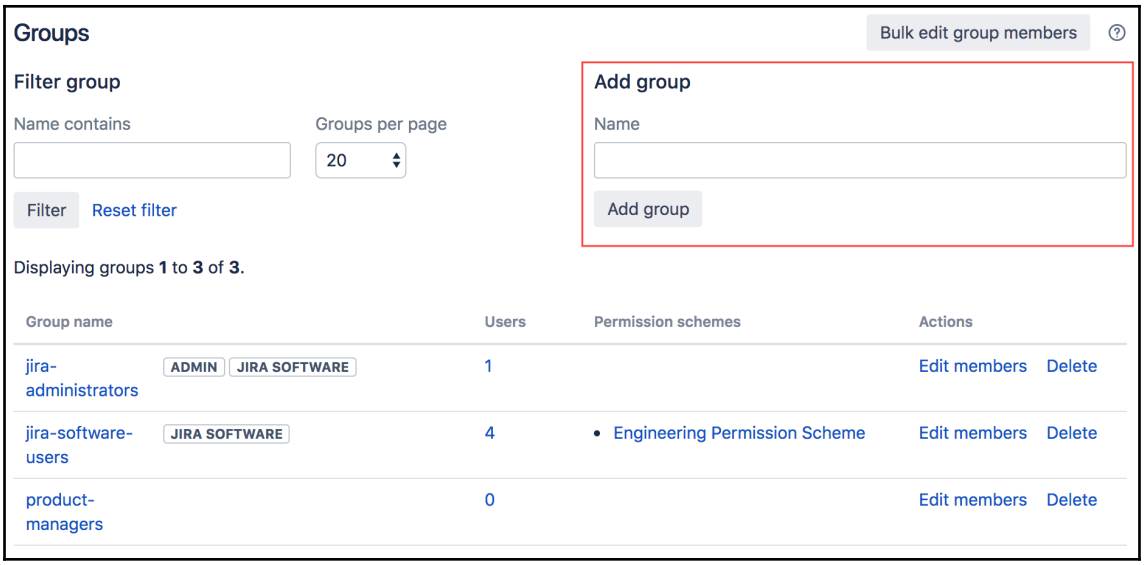

Configure LDAP User Directory
The settings below configure an LDAP directory which will be regularly synchronised with JIRA. Contact your server administrator to find out the required settings for your LDAP server.
Server Settings
Name:*
Active Directory server
Directory Type:*
Microsoft Active Directory
Making a selection will automatically enter default values for several options below.
Hostname:*
ad.example.com
Hostname of the server running LDAP. Example: ldap.example.com
Port:*
389
Use SSL
Username:
cn=jira,dc=example,dc=com
User to log in to LDAP. Examples: user@domain.name or cn=user,dc=domain,dc=name.
Password:
LDAP Schema
Base DN:
cn=users,dc=example,dc=com
Root node in LDAP from which to search for users and groups. Example: cn=users,dc=example,dc=com.
Additional User DN:
Prepended to the base DN to limit the scope when searching for users.
Additional Group DN:
Prepended to the base DN to limit the scope when searching for groups.
LDAP Permissions
Read Only
Users, groups and memberships are retrieved from your LDAP server and cannot be modified in JIRA.
Read Only, with Local Groups
Users, groups and memberships are retrieved from your LDAP server and cannot be modified in JIRA. Users from LDAP can be added to groups maintained in JIRA's internal directory.
Read/Write
Modifying users, groups and memberships in JIRA will cause the changes to be applied directly to your LDAP server. Your configured LDAP user will need to have modification permissions on your LDAP server.

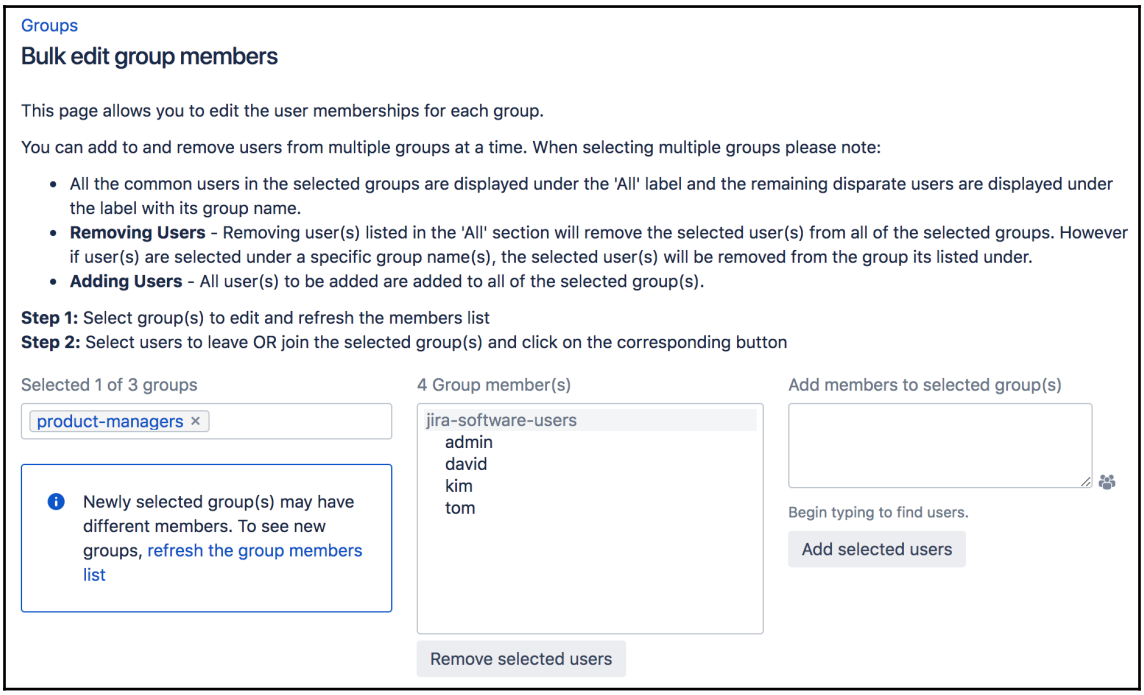

Test Remote Directory Connection
Use this form to test the connection to Microsoft Active Directory (Read Only) directory 'Microsoft Directory server'.
For extended testing enter the credentials of a user in the remote directory.
Test basic connection : Succeeded
Test retrieve user : Succeeded
Test get user's memberships : Succeeded, 16 groups retrieved
Test retrieve group : Succeeded
Test get group members : Succeeded, 1 users retrieved
Test user can authenticate : Succeeded
User name
patrick
Password
Test Settings
Edit Settings
Back to directory list

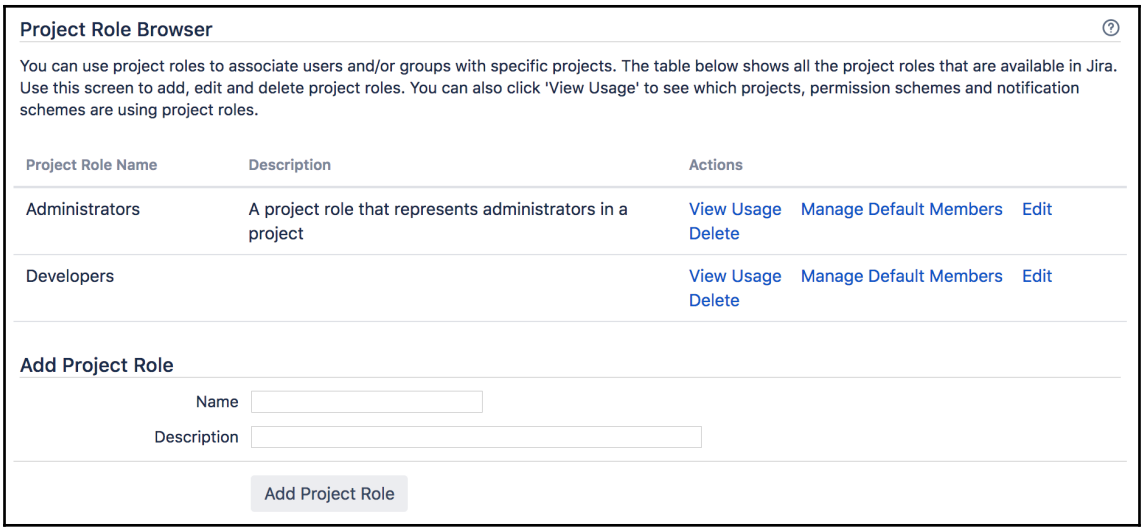

Users
Invite users
Create user
Filter users
Name, username or email
In group
Any
Application access
All Users
Status
All Users
Users per page
20
Filter
Reset
Displaying users 1 to 4 of 4.
Full name
Username
Login details
Group name
Applications
Directory
Actions
Patrick Li
admin
admin@example.com
Count: 58
Last: 13 minutes ago
jira-administrators
jira-software-users
Jira Software
Jira Internal Directory
Edit
David Jones
david
david@test.com
Count: 3
Last: 11/Dec/18 9:15 AM
jira-software-users
Jira Software
Jira Internal Directory
Edit
Kim Lee
kim
kim@test.com
Count: 2
Last: 07/Dec/18 10:56 AM
jira-software-users
Jira Software
Jira Internal Directory
Edit
Tom Johnson
tom
tom@test.com
Count: 4
Last: 20/Dec/18 8:28 AM
jira-software-users
Jira Software
Jira Internal Directory
Edit

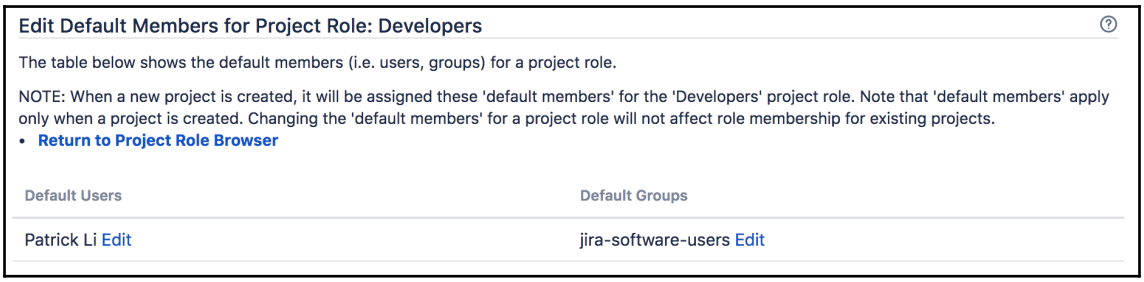

Login
Username
Password
Remember my login on this computer
public sign up
Not a member? Sign up for an account.
Log In
Can't access your account?

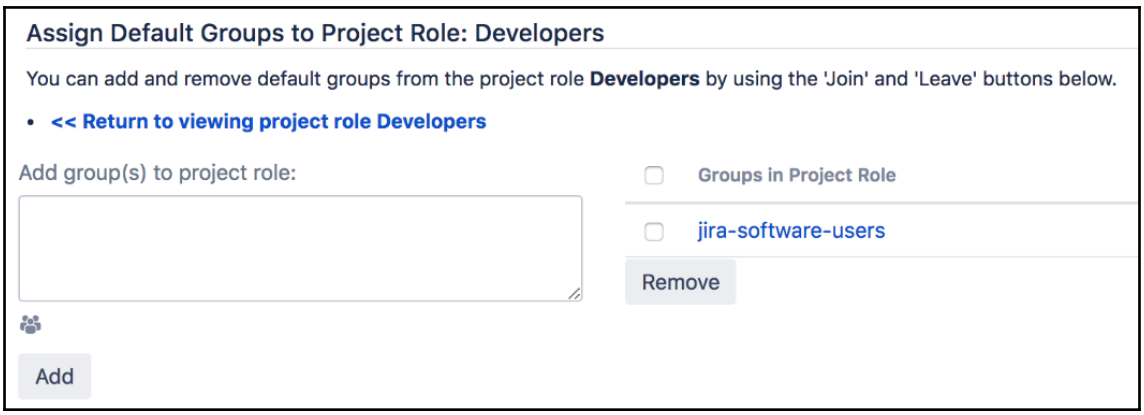
Sign up
Email*
E.g. charlie@atlassian.com
Full name*
Your full name
Username*
Desired username
Password*
Password
Please enter the word as shown below
winides
Sign up
Cancel

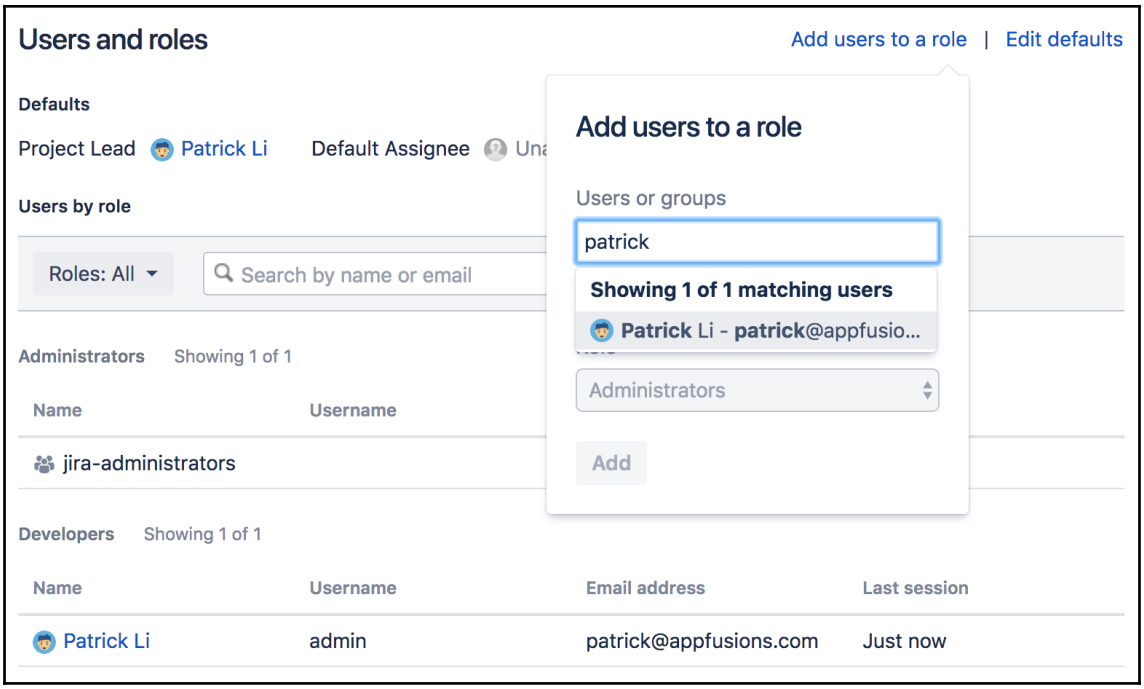

Groups
Bulk edit group members
Filter group
Name contains
Groups per page
20
Filter
Reset filter
Add group
Name
Add group
Displaying groups 1 to 3 of 3.
Group name
Users
Permission schemes
Actions
jira-administrators
ADMIN
JIRA SOFTWARE
1
Edit members
Delete
jira-software-users
JIRA SOFTWARE
4
Engineering Permission Scheme
Edit members
Delete
product-managers
0
Edit members
Delete

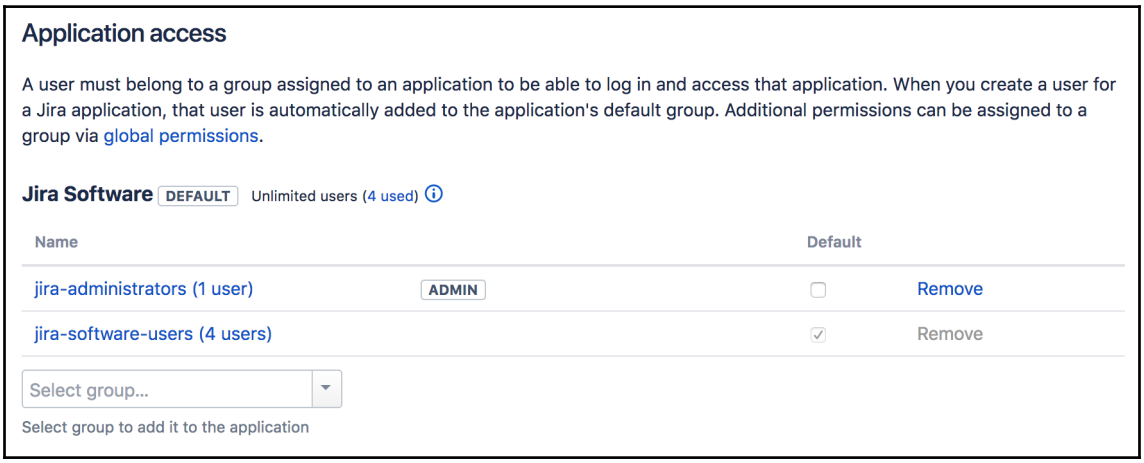

Groups
Bulk edit group members
This page allows you to edit the user memberships for each group.
You can add to and remove users from multiple groups at a time. When selecting multiple groups please note:
All the common users in the selected groups are displayed under the 'All' label and the remaining disparate users are displayed under the label with its group name.
Removing Users - Removing user(s) listed in the 'All' section will remove the selected user(s) from all of the selected groups. However if user(s) are selected under a specific group name(s), the selected user(s) will be removed from the group its listed under.
Adding Users - All user(s) to be added are added to all of the selected group(s).
Step 1: Select group(s) to edit and refresh the members list
Step 2: Select users to leave OR join the selected group(s) and click on the corresponding button
Selected 1 of 3 groups
product-managers ×
Newly selected group(s) may have different members. To see new groups, refresh the group members list
4 Group member(s)
jira-software-users
admin
david
kim
tom
Remove selected users
Add members to selected group(s)
Begin typing to find users.
Add selected users

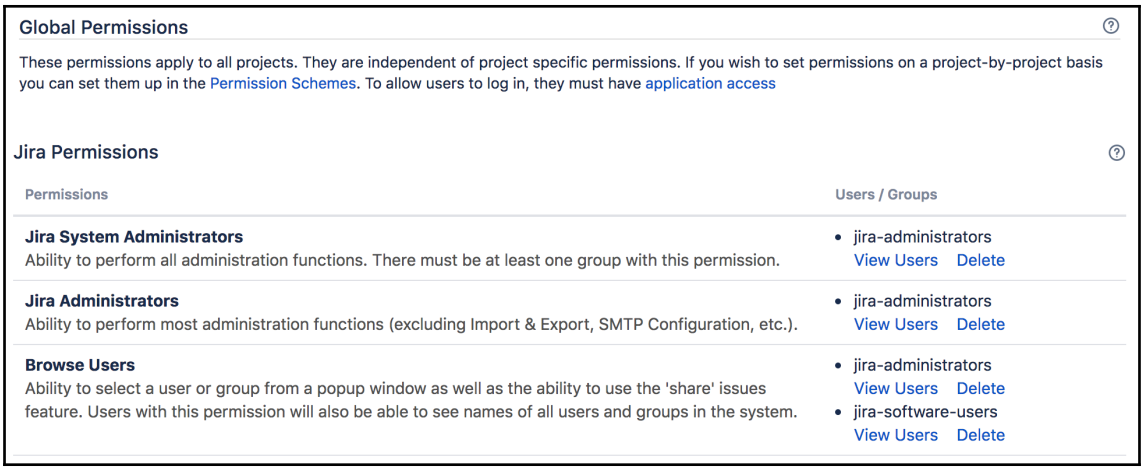

Project Role Browser
You can use project roles to associate users and/or groups with specific projects. The table below shows all the project roles that are available in Jira. Use this screen to add, edit and delete project roles. You can also click 'View Usage' to see which projects, permission schemes and notification schemes are using project roles.
Project Role Name
Description
Actions
Administrators
A project role that represents administrators in a project
View Usage Manage Default Members Edit Delete
Developers
View Usage Manage Default Members Edit Delete
Add Project Role
Name
Description
Add Project Role

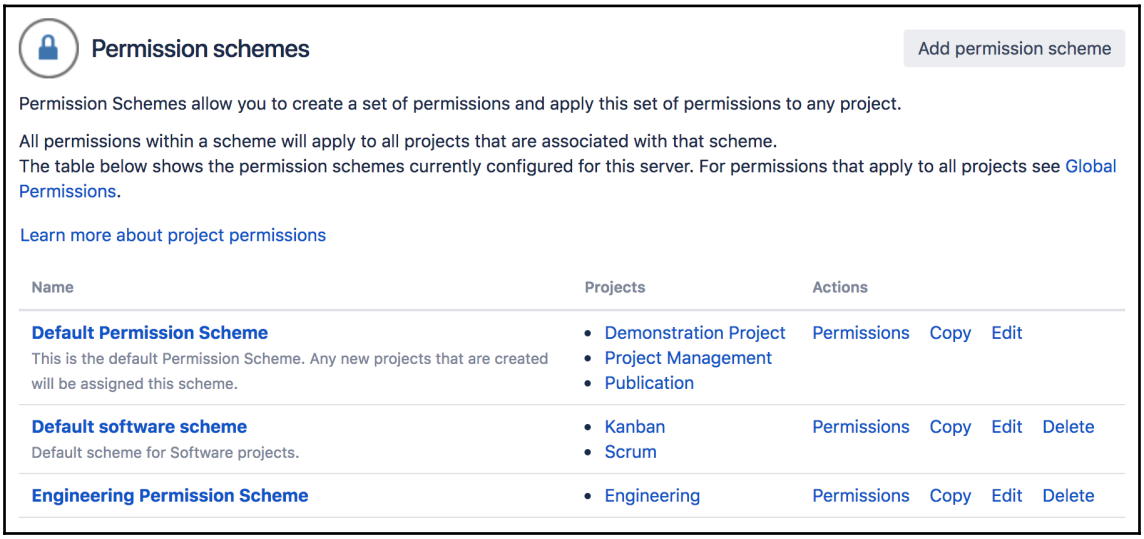

Edit Default Members for Project Role: Developers
The table below shows the default members (i.e. users, groups) for a project role.
NOTE: When a new project is created, it will be assigned these 'default members' for the 'Developers' project role. Note that 'default members' apply only when a project is created. Changing the 'default members' for a project role will not affect role membership for existing projects.
Return to Project Role Browser
Default Users
Default Groups
Patrick Li Edit
jira-software-users Edit

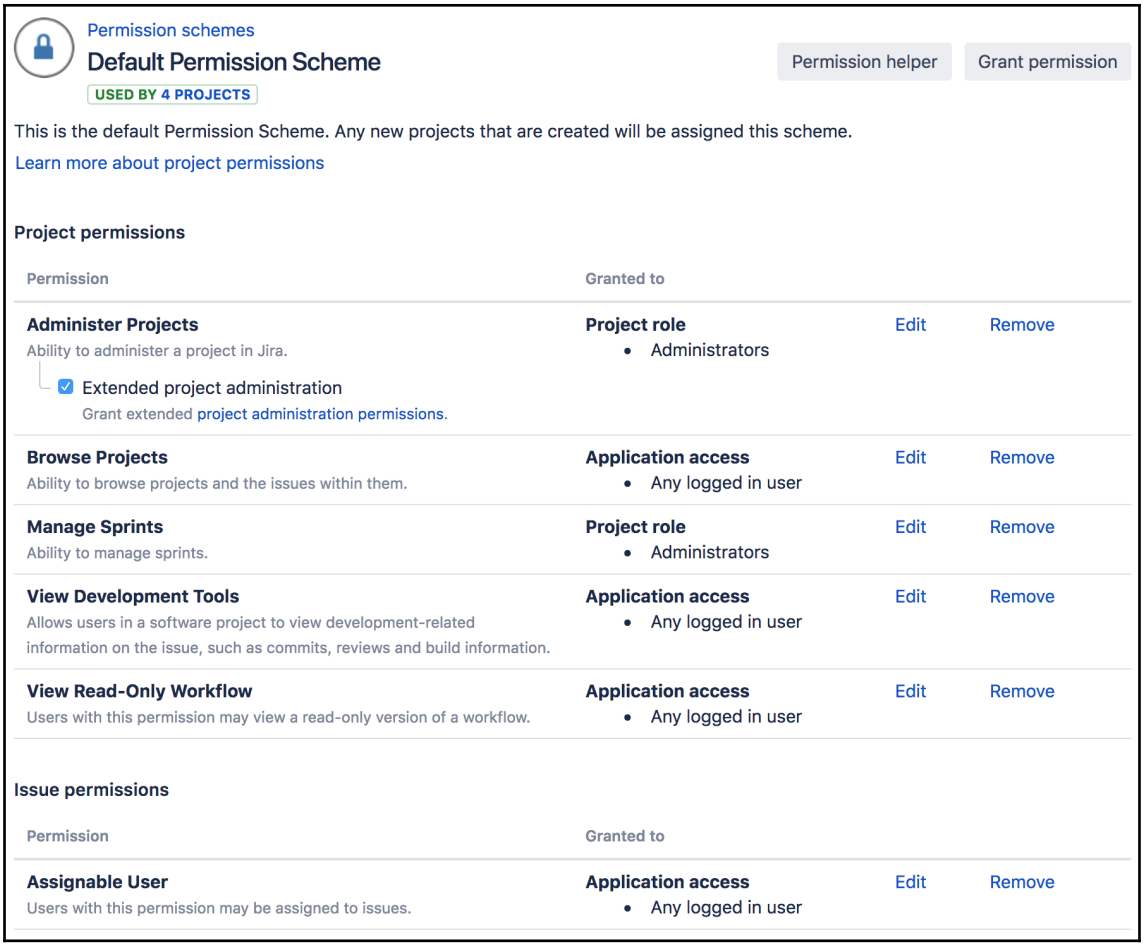

Assign Default Groups to Project Role: Developers
You can add and remove default groups from the project role Developers by using the 'Join' and 'Leave' buttons below.
<< Return to viewing project role Developers
Add group(s) to project role:
Groups in Project Role
jira-software-users
Remove
Add

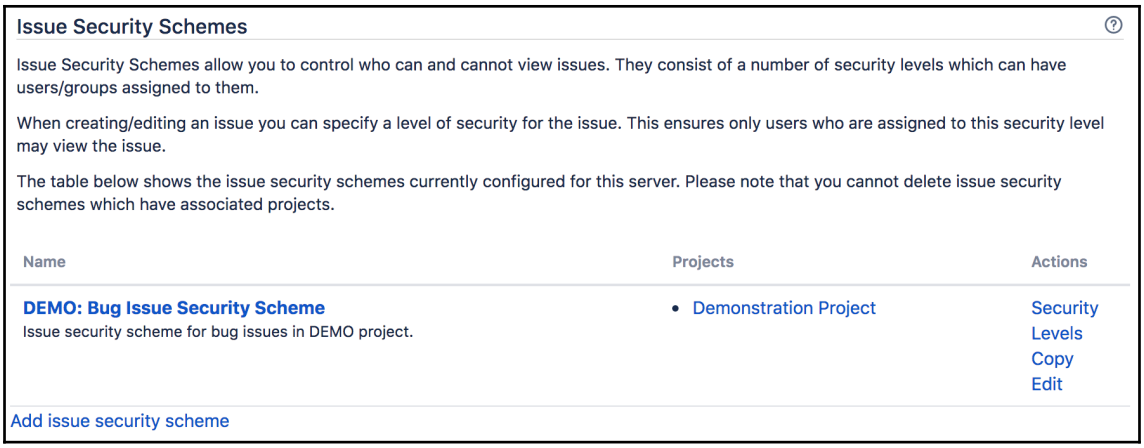

Users and roles
Add users to a role | Edit defaults
Defaults
Project Lead Patrick Li
Default Assignee
Users by role
Roles: All
Search by name or email
Administrators Showing 1 of 1
Name
Username
jira-administrators
Developers Showing 1 of 1
Name
Username
Email address
Last session
Patrick Li
admin
patrick@appfusions.com
Just now
Add users to a role
Users or groups
patrick
Showing 1 of 1 matching users
Patrick Li - patrick@appfusio...
Administrators
Add


Application access
A user must belong to a group assigned to an application to be able to log in and access that application. When you create a user for a Jira application, that user is automatically added to the application's default group. Additional permissions can be assigned to a group via global permissions.
Jira Software DEFAULT Unlimited users (4 used)
Name
Default
jira-administrators (1 user) ADMIN
Remove
jira-software-users (4 users)
Remove
Select group...
Select group to add it to the application


Global Permissions
These permissions apply to all projects. They are independent of project specific permissions. If you wish to set permissions on a project-by-project basis you can set them up in the Permission Schemes. To allow users to log in, they must have application access
Jira Permissions
Permissions
Users / Groups
Jira System Administrators
Ability to perform all administration functions. There must be at least one group with this permission.
jira-administrators
View Users Delete
Jira Administrators
Ability to perform most administration functions (excluding Import & Export, SMTP Configuration, etc.).
jira-administrators
View Users Delete
Browse Users
Ability to select a user or group from a popup window as well as the ability to use the 'share' issues feature. Users with this permission will also be able to see names of all users and groups in the system.
jira-administrators
View Users Delete
jira-software-users
View Users Delete


Permission schemes
Add permission scheme
Permission Schemes allow you to create a set of permissions and apply this set of permissions to any project.
All permissions within a scheme will apply to all projects that are associated with that scheme.
The table below shows the permission schemes currently configured for this server. For permissions that apply to all projects see Global Permissions.
Learn more about project permissions
Name
Projects
Actions
Default Permission Scheme
This is the default Permission Scheme. Any new projects that are created will be assigned this scheme.
Demonstration Project
Project Management
Publication
Permissions Copy Edit
Default software scheme
Default scheme for Software projects.
Kanban
Scrum
Permissions Copy Edit Delete
Engineering Permission Scheme
Engineering
Permissions Copy Edit Delete


Permission schemes
Default Permission Scheme
USED BY 4 PROJECTS
Permission helper
Grant permission
This is the default Permission Scheme. Any new projects that are created will be assigned this scheme.
Learn more about project permissions
Project permissions
Permission
Granted to
Administer Projects
Ability to administer a project in Jira.
Extended project administration
Grant extended project administration permissions.
Project role
Administrators
Edit
Remove
Browse Projects
Ability to browse projects and the issues within them.
Application access
Any logged in user
Edit
Remove
Manage Sprints
Ability to manage sprints.
Project role
Administrators
Edit
Remove
View Development Tools
Allows users in a software project to view development-related information on the issue, such as commits, reviews and build information.
Application access
Any logged in user
Edit
Remove
View Read-Only Workflow
Users with this permission may view a read-only version of a workflow.
Application access
Any logged in user
Edit
Remove
Issue permissions
Permission
Granted to
Assignable User
Users with this permission may be assigned to issues.
Application access
Any logged in user
Edit
Remove



Issue Security Schemes

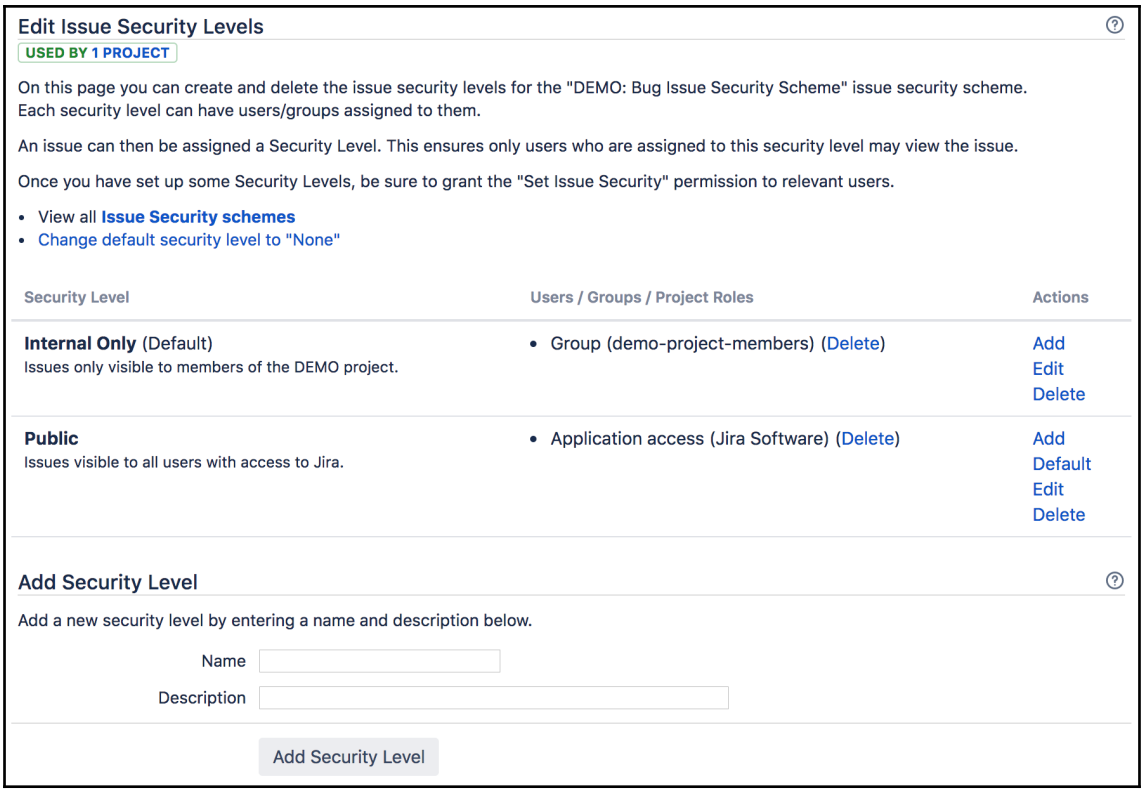
Issue Security Schemes allow you to control who can and cannot view issues. They consist of a number of security levels which can have users/groups assigned to them.

When creating/editing an issue you can specify a level of security for the issue. This ensures only users who are assigned to this security level may view the issue.

The table below shows the issue security schemes currently configured for this server. Please note that you cannot delete issue security schemes which have associated projects.

Name	Projects	Actions
DEMO: Bug Issue Security Scheme Issue security scheme for bug issues in DEMO project.	• Demonstration Project	Security Levels Copy Edit

Add issue security scheme



Edit Issue Security Levels

USED BY 1 PROJECT

On this page you can create and delete the issue security levels for the "DEMO: Bug Issue Security Scheme" issue security scheme. Each security level can have users/groups assigned to them.

An issue can then be assigned a Security Level. This ensures only users who are assigned to this security level may view the issue.

Once you have set up some Security Levels, be sure to grant the "Set Issue Security" permission to relevant users.

- View all **Issue Security schemes**
- Change default security level to "None"

Security Level	Users / Groups / Project Roles	Actions
Internal Only (Default) Issues only visible to members of the DEMO project.	• Group (demo-project-members) (Delete)	Add Edit Delete
Public Issues visible to all users with access to Jira.	• Application access (Jira Software) (Delete)	Add Default Edit Delete

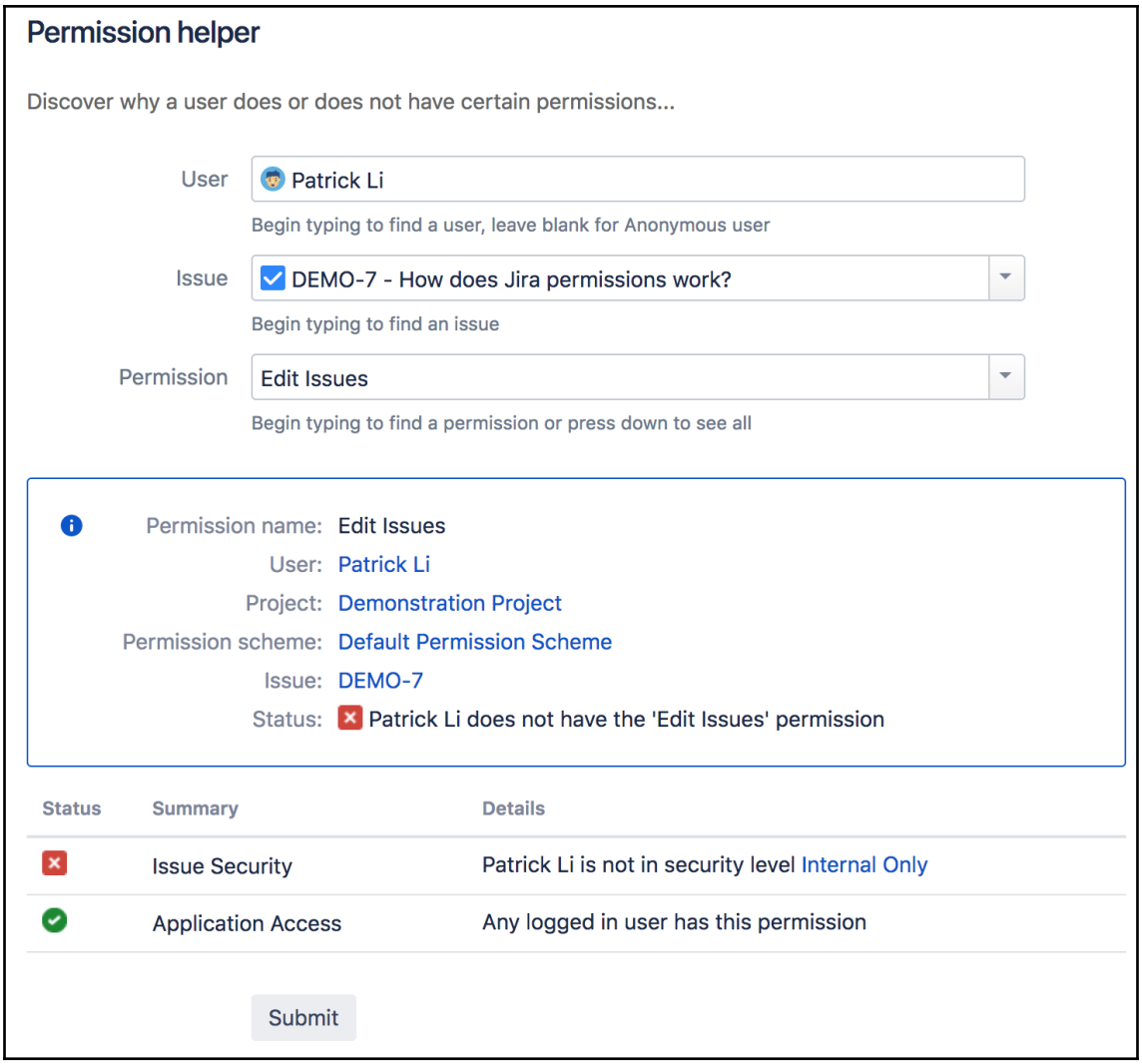
Add Security Level

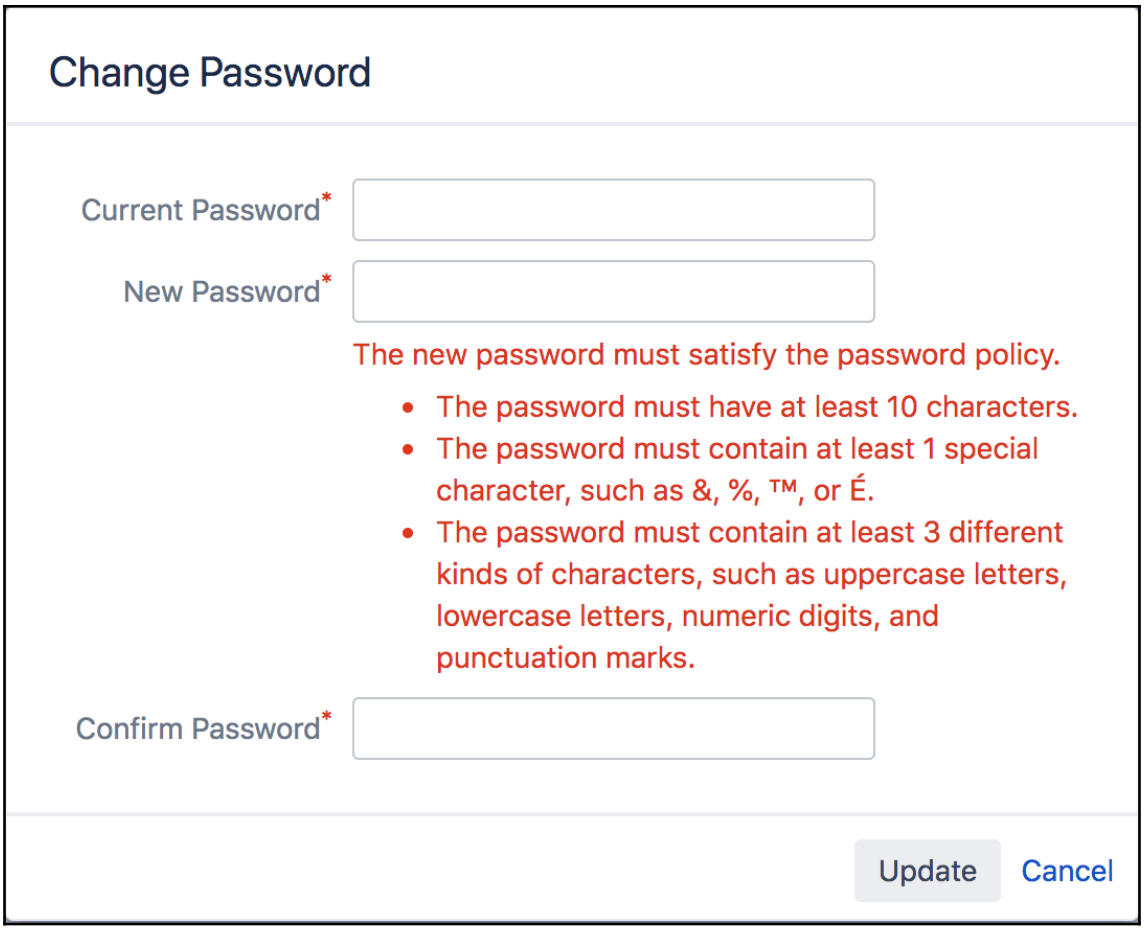
Add a new security level by entering a name and description below.

Name

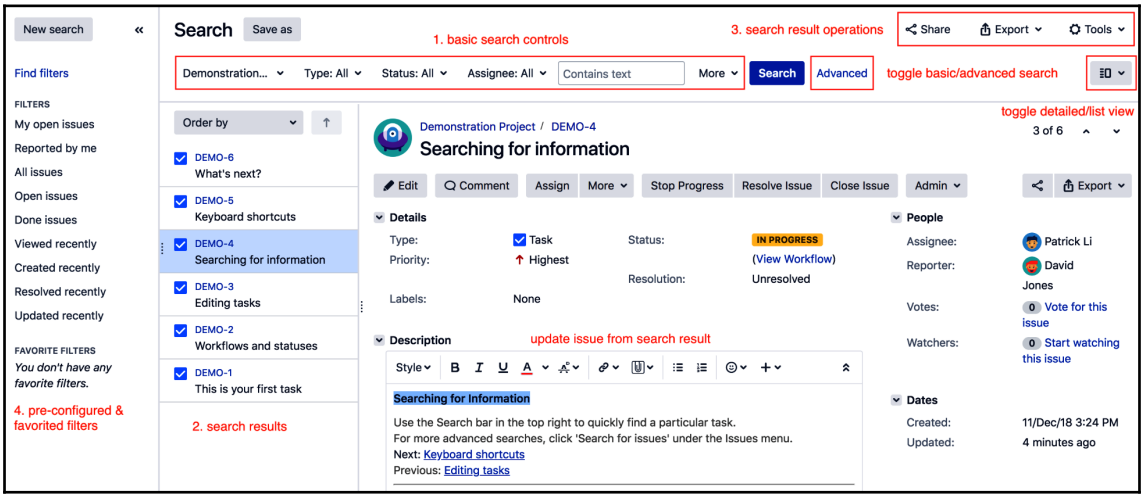
Description

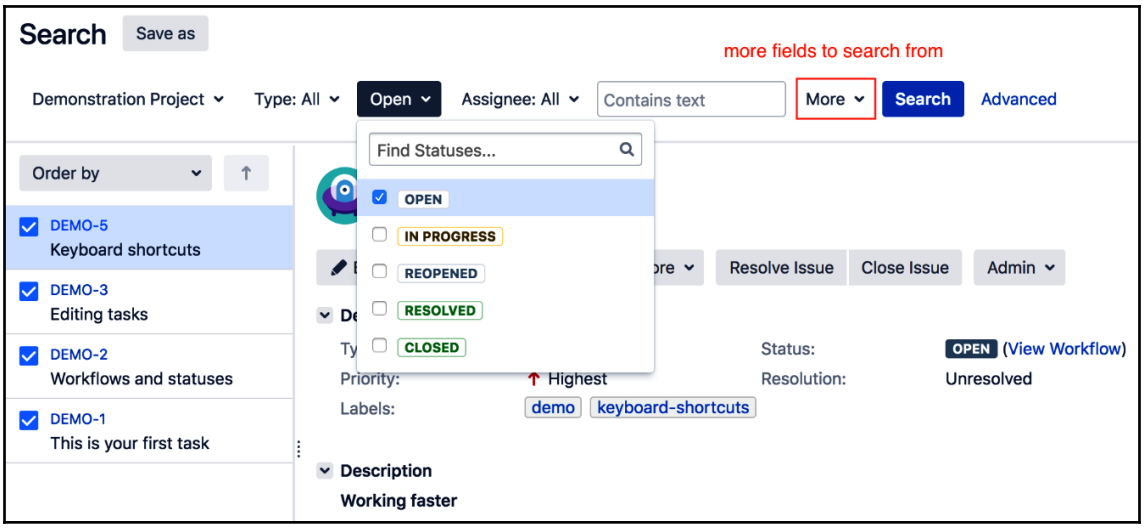
Add Security Level

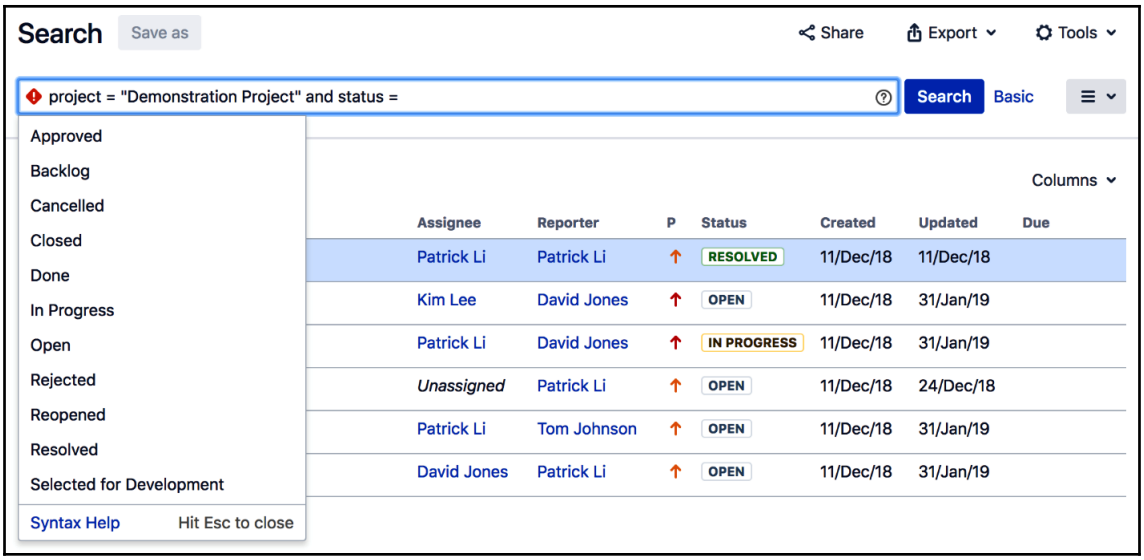

Permission helper
Discover why a user does or does not have certain permissions...
User
Patrick Li
Begin typing to find a user, leave blank for Anonymous user
Issue
DEMO-7 - How does Jira permissions work?
Begin typing to find an issue
Permission
Edit Issues
Begin typing to find a permission or press down to see all
Permission name: Edit Issues
User: Patrick Li
Project: Demonstration Project
Permission scheme: Default Permission Scheme
Issue: DEMO-7
Status: Patrick Li does not have the 'Edit Issues' permission
Status
Summary
Details
Issue Security
Patrick Li is not in security level Internal Only
Application Access
Any logged in user has this permission
Submit

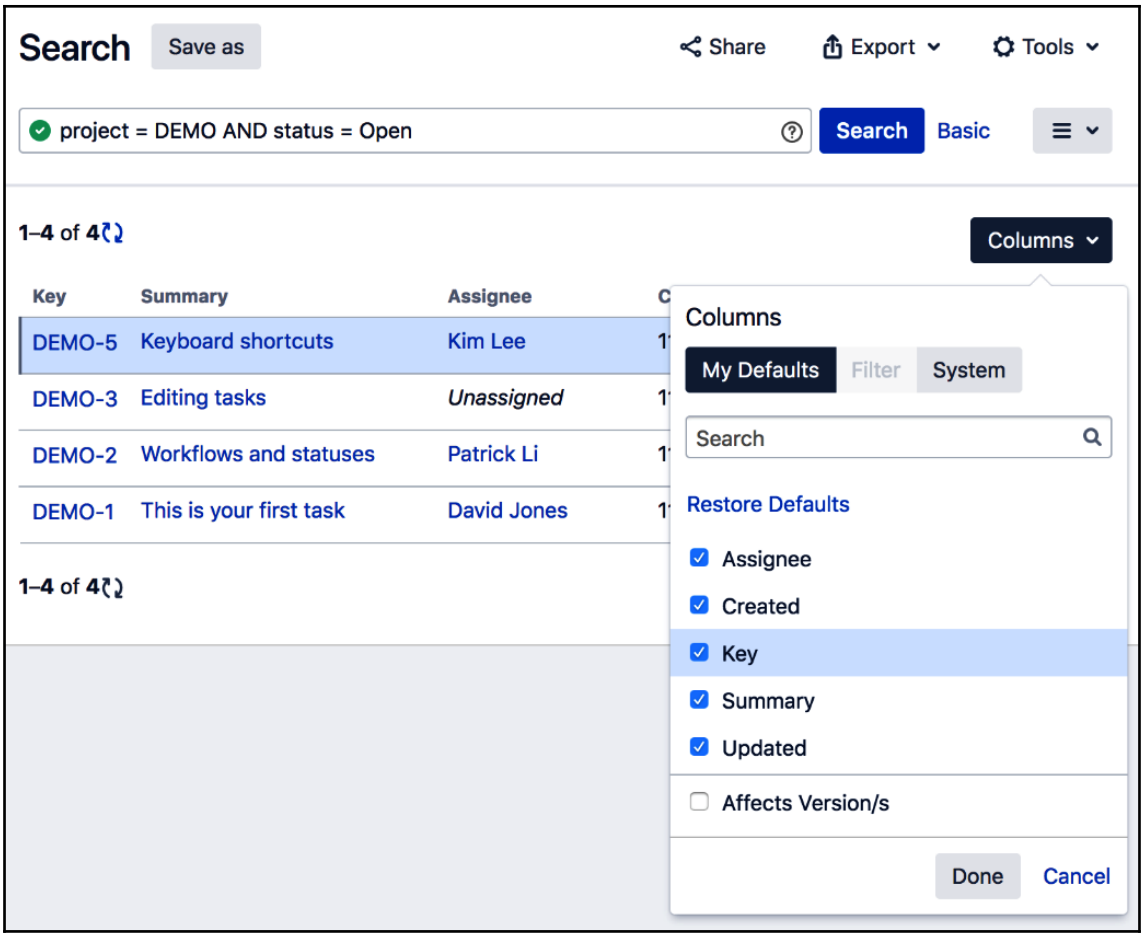

Change Password
Current Password*
New Password*
The new password must satisfy the password policy.
The password must have at least 10 characters.
The password must contain at least 1 special character, such as &, %, ™, or É.
The password must contain at least 3 different kinds of characters, such as uppercase letters, lowercase letters, numeric digits, and punctuation marks.
Confirm Password*
Update
Cancel

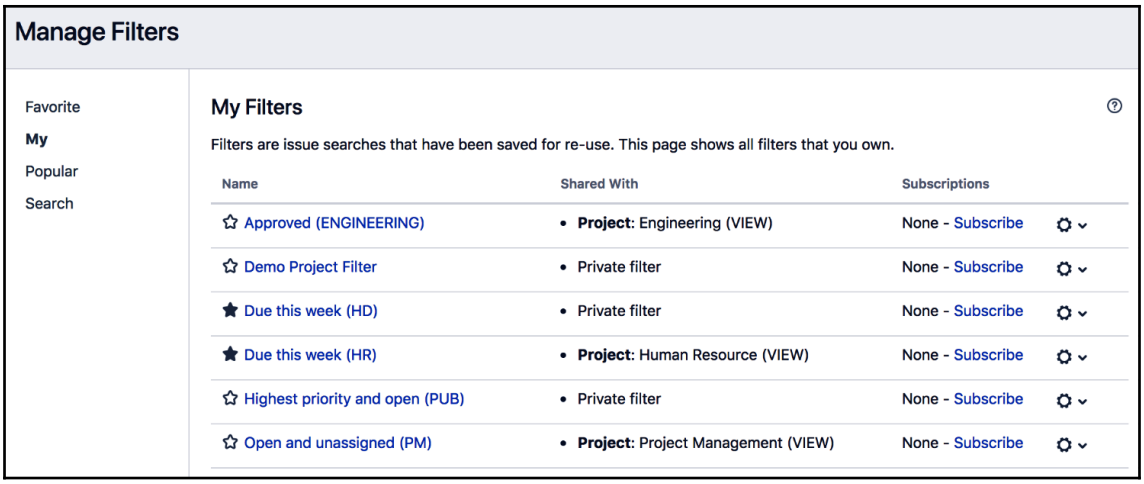
Chapter 10: Searching, Reporting, and Analysis

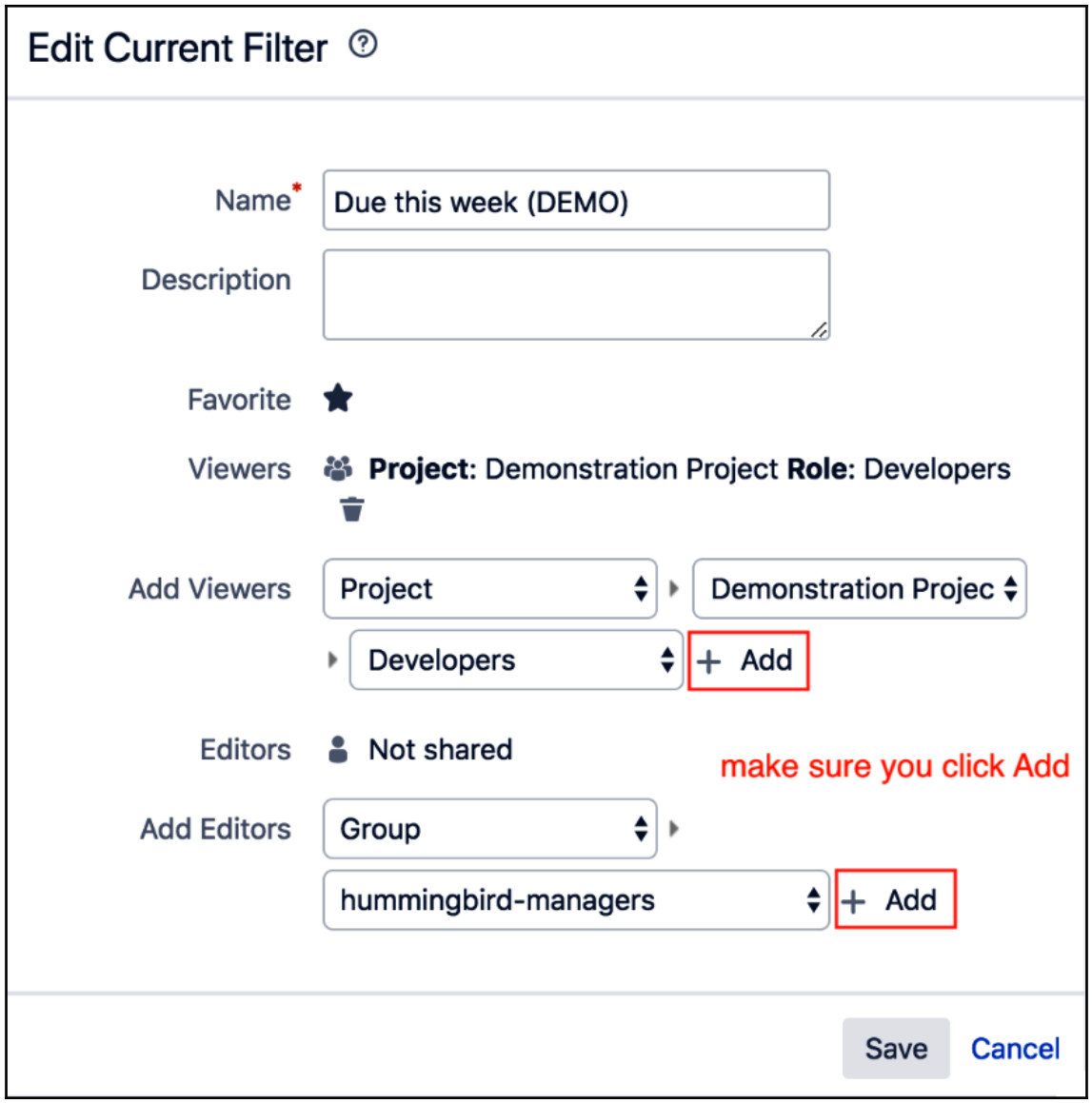


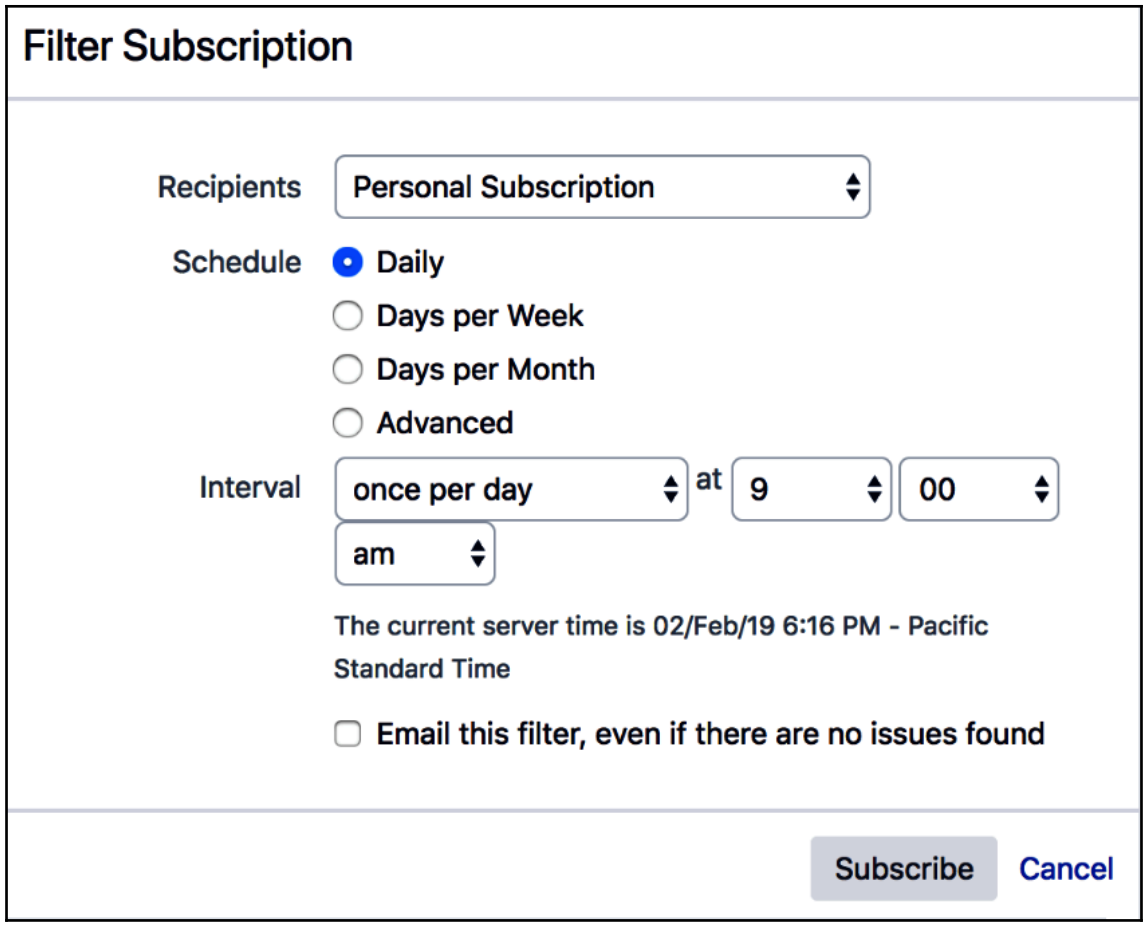


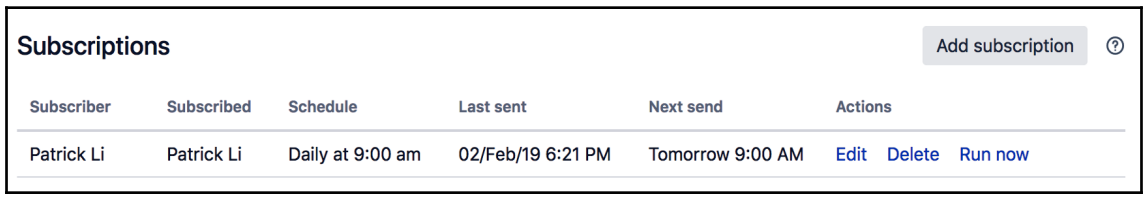

Search
Save as
Share
Export
Tools
project = "Demonstration Project" and status =
Search
Basic
Approved
Backlog
Cancelled
Closed
Done
In Progress
Open
Rejected
Reopened
Resolved
Selected for Development
Syntax Help
Hit Esc to close
Columns
Assignee
Reporter
P
Status
Created
Updated
Due
Patrick Li
Patrick Li
RESOLVED
11/Dec/18
11/Dec/18
Kim Lee
David Jones
OPEN
11/Dec/18
31/Jan/19
Patrick Li
David Jones
IN PROGRESS
11/Dec/18
31/Jan/19
Unassigned
Patrick Li
OPEN
11/Dec/18
24/Dec/18
Patrick Li
Tom Johnson
OPEN
11/Dec/18
31/Jan/19
David Jones
Patrick Li
OPEN
11/Dec/18
31/Jan/19


Search
Save as
Share
Export
Tools
project = DEMO AND status = Open
Search
Basic
1–4 of 4
Columns
Key
Summary
Assignee
DEMO-5
Keyboard shortcuts
Kim Lee
DEMO-3
Editing tasks
Unassigned
DEMO-2
Workflows and statuses
Patrick Li
DEMO-1
This is your first task
David Jones
1–4 of 4
Columns
My Defaults
Filter
System
Search
Restore Defaults
Assignee
Created
Key
Summary
Updated
Affects Version/s
Done
Cancel


Manage Filters
Favorite
My
Popular
Search
My Filters
Filters are issue searches that have been saved for re-use. This page shows all filters that you own.
Name
Shared With
Subscriptions
Approved (ENGINEERING)
Project: Engineering (VIEW)
None - Subscribe
Demo Project Filter
Private filter
None - Subscribe
Due this week (HD)
Private filter
None - Subscribe
Due this week (HR)
Project: Human Resource (VIEW)
None - Subscribe
Highest priority and open (PUB)
Private filter
None - Subscribe
Open and unassigned (PM)
Project: Project Management (VIEW)
None - Subscribe


Edit Current Filter
Name*
Due this week (DEMO)
Description
Favorite
Viewers
Project: Demonstration Project Role: Developers
Add Viewers
Project
Demonstration Projec
Developers
+ Add
Editors
Not shared
make sure you click Add
Add Editors
Group
hummingbird-managers
+ Add
Save
Cancel


Filter Subscription
Recipients
Personal Subscription
Schedule
Daily
Days per Week
Days per Month
Advanced
Interval
once per day
at
9
00
am
The current server time is 02/Feb/19 6:16 PM - Pacific Standard Time
Email this filter, even if there are no issues found
Subscribe
Cancel


Subscriptions
Add subscription
Subscriber
Subscribed
Schedule
Last sent
Next send
Actions
Patrick Li
Patrick Li
Daily at 9:00 am
02/Feb/19 6:21 PM
Tomorrow 9:00 AM
Edit
Delete
Run now

Search Shared Filters

Find and modify filters that are shared with any group or role.

Search

Searches in the filter's name and description.

Owner

Start typing to get a list of possible matches.

Search

Name	Owner	Shared With	Popularity
Due this week (HD)	Patrick Li (admin)	• **Project**: Human Resource (VIEW)	1
Due this week (PM)	Patrick Li (admin)	• **Project**: Project Management (VIEW)	
Filter for SALES board	Patrick Li (admin)	• **Project**: Sales (VIEW)	

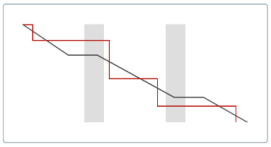
Change Owner

Delete Filter

All reports

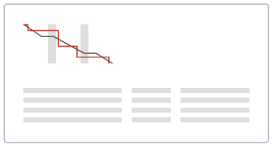
Switch report

Agile



Burndown Chart

Track the total work remaining and project the likelihood of achieving the sprint goal. This helps your team manage its progress and respond accordingly.

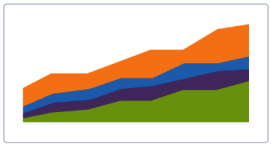


Sprint Report

Understand the work completed or pushed back to the backlog in each sprint. This helps you determine if your team is overcommitting or if there is excessive scope creep.

Velocity Chart

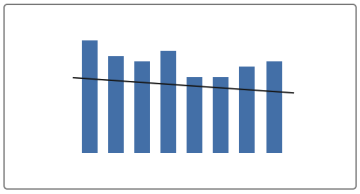
Track the amount of work completed from sprint to sprint. This helps you determine your team's velocity and estimate the work your team can realistically achieve in future sprints.



Cumulative Flow Diagram

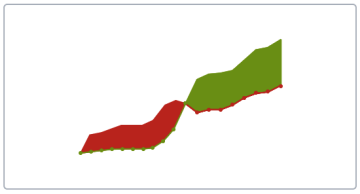
Shows the statuses of issues over time. This helps you identify potential bottlenecks that need to be investigated.

Issue analysis



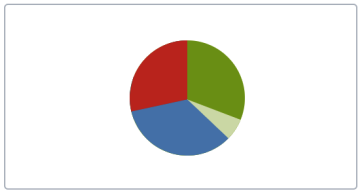
Average Age Report

Shows the average age of unresolved issues for a project or filter. This helps you see whether your backlog is being kept up to date.



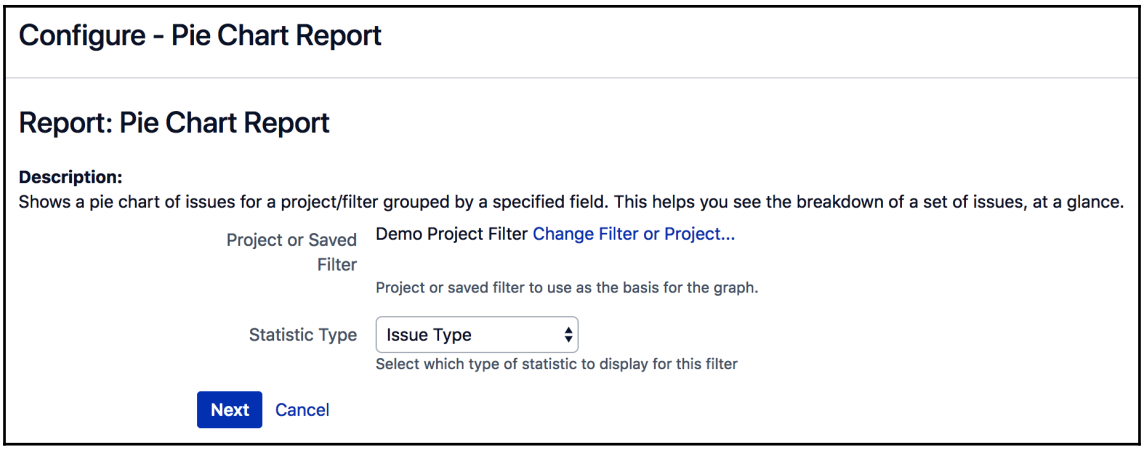
Created vs. Resolved Issues Report

Maps created issues versus resolved issues over a period of time. This can help you understand whether your overall backlog is growing or shrinking.



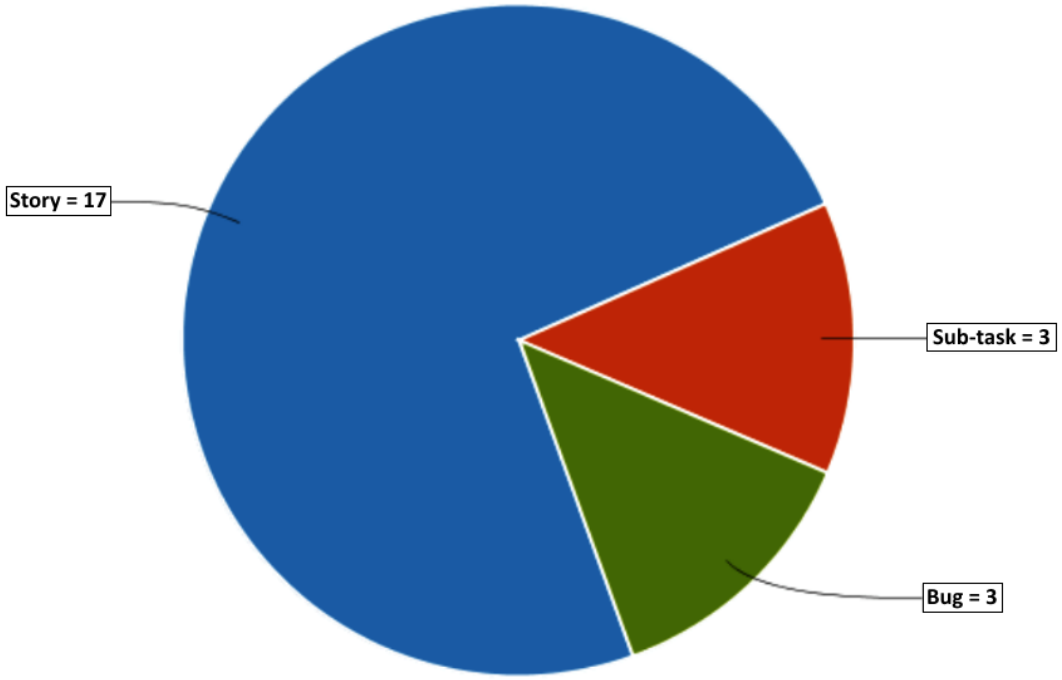
Pie Chart Report

Shows a pie chart of issues for a project/filter grouped by a specified field. This helps you see the breakdown of a set of issues, at a glance.


Configure - Pie Chart Report
Report: Pie Chart Report
Description:
Shows a pie chart of issues for a project/filter grouped by a specified field. This helps you see the breakdown of a set of issues, at a glance.
Project or Saved Filter
Demo Project Filter Change Filter or Project...
Project or saved filter to use as the basis for the graph.
Statistic Type
Issue Type
Select which type of statistic to display for this filter
Next
Cancel

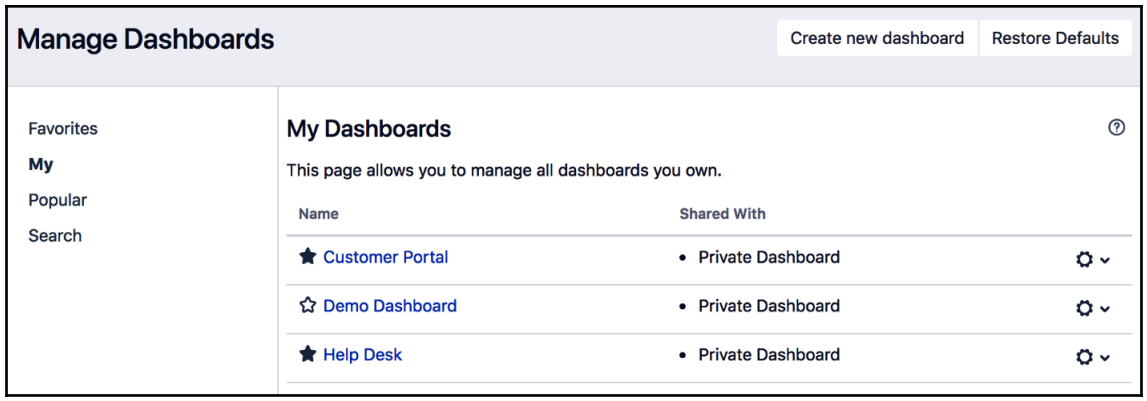
Project: Demonstration Project (Issue Type)

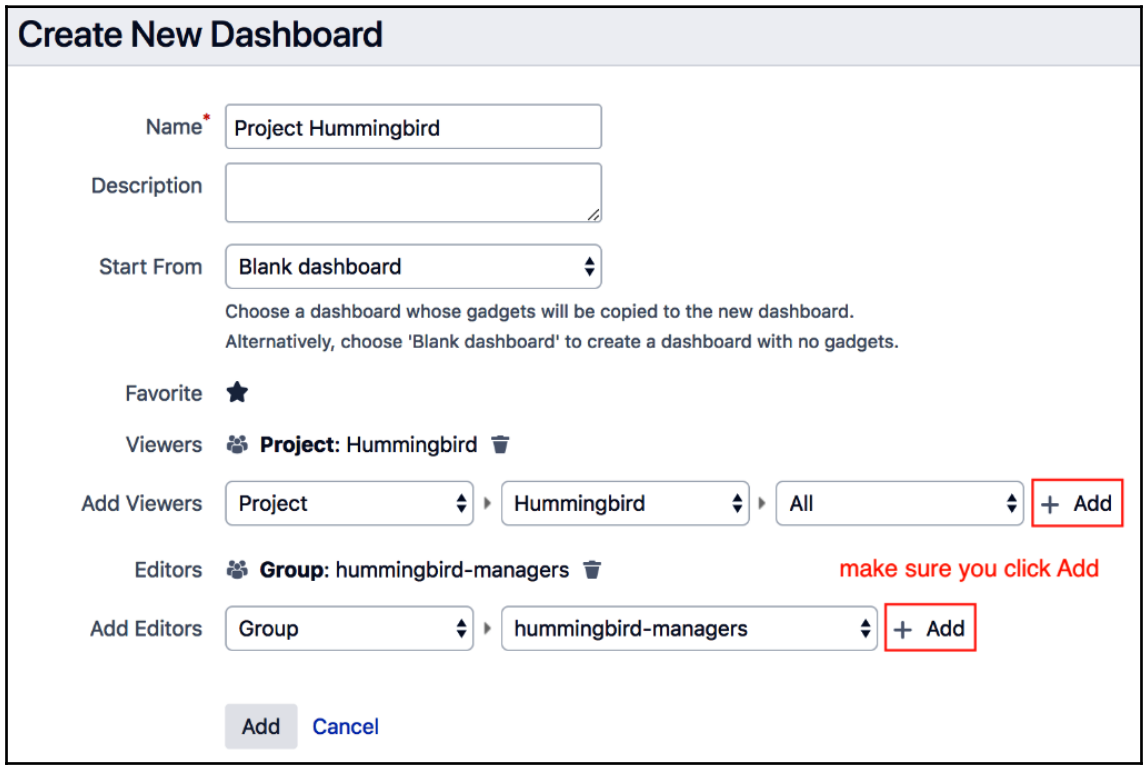
Chart

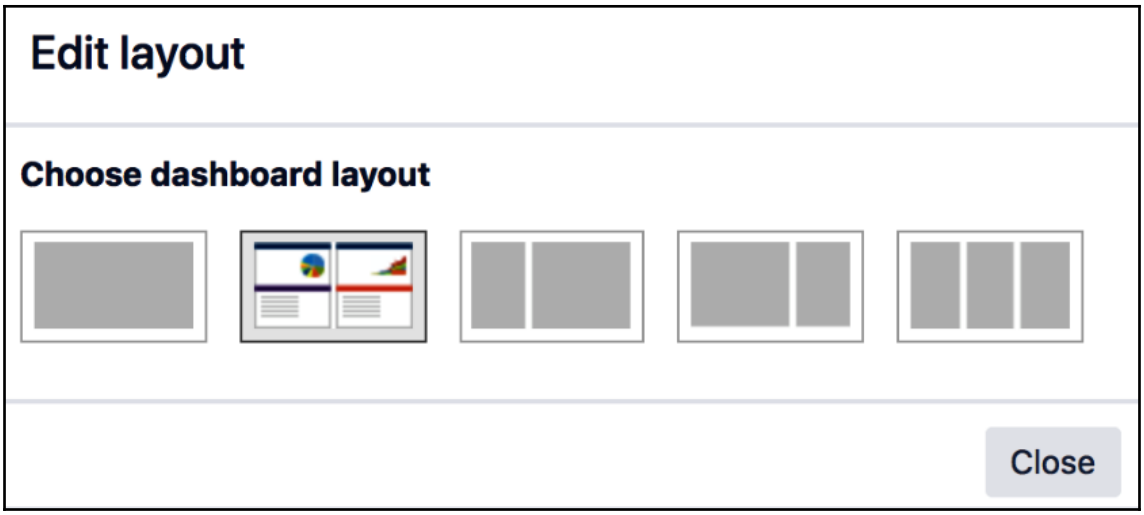


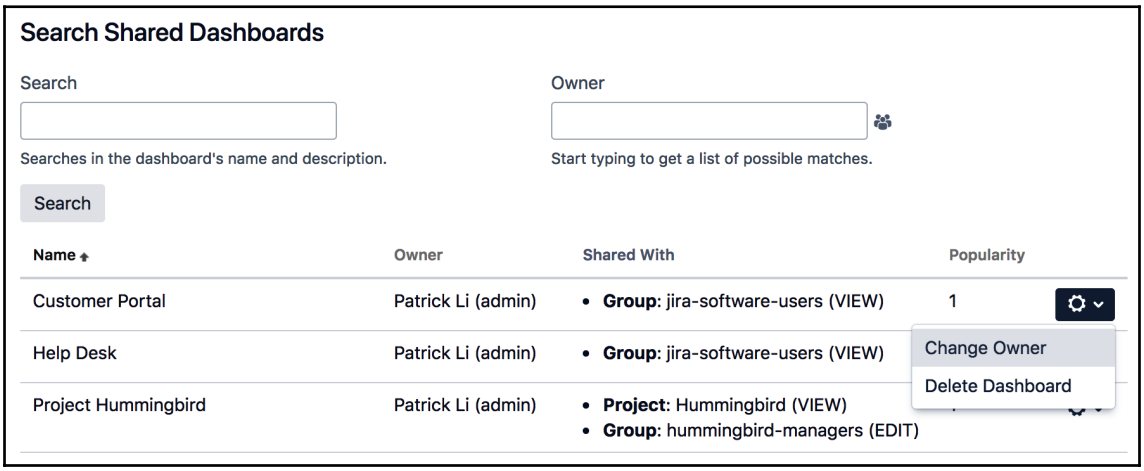
Data Table

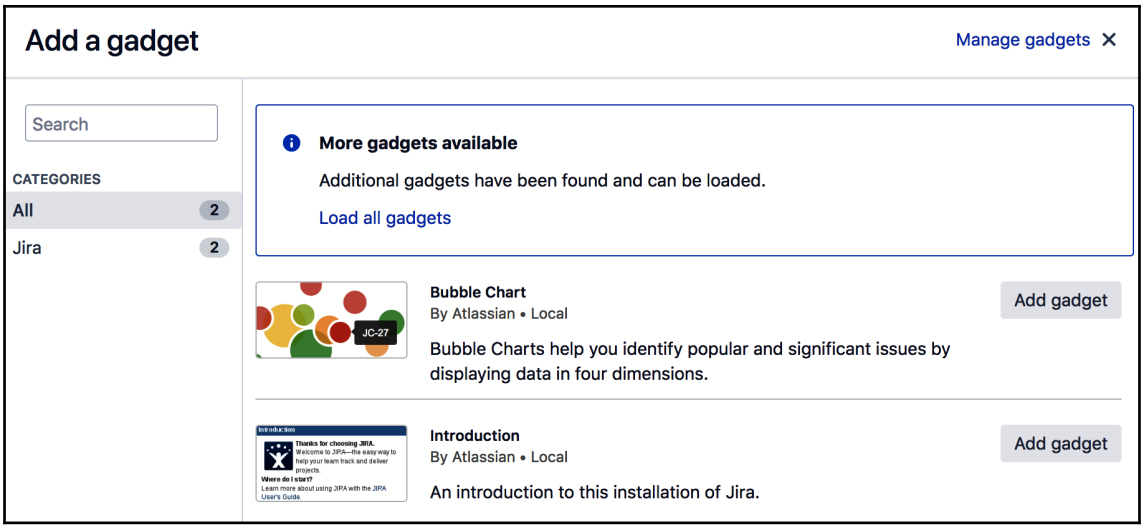
	Issues	%
Story	17	73%
Sub-task	3	13%
Bug	3	13%

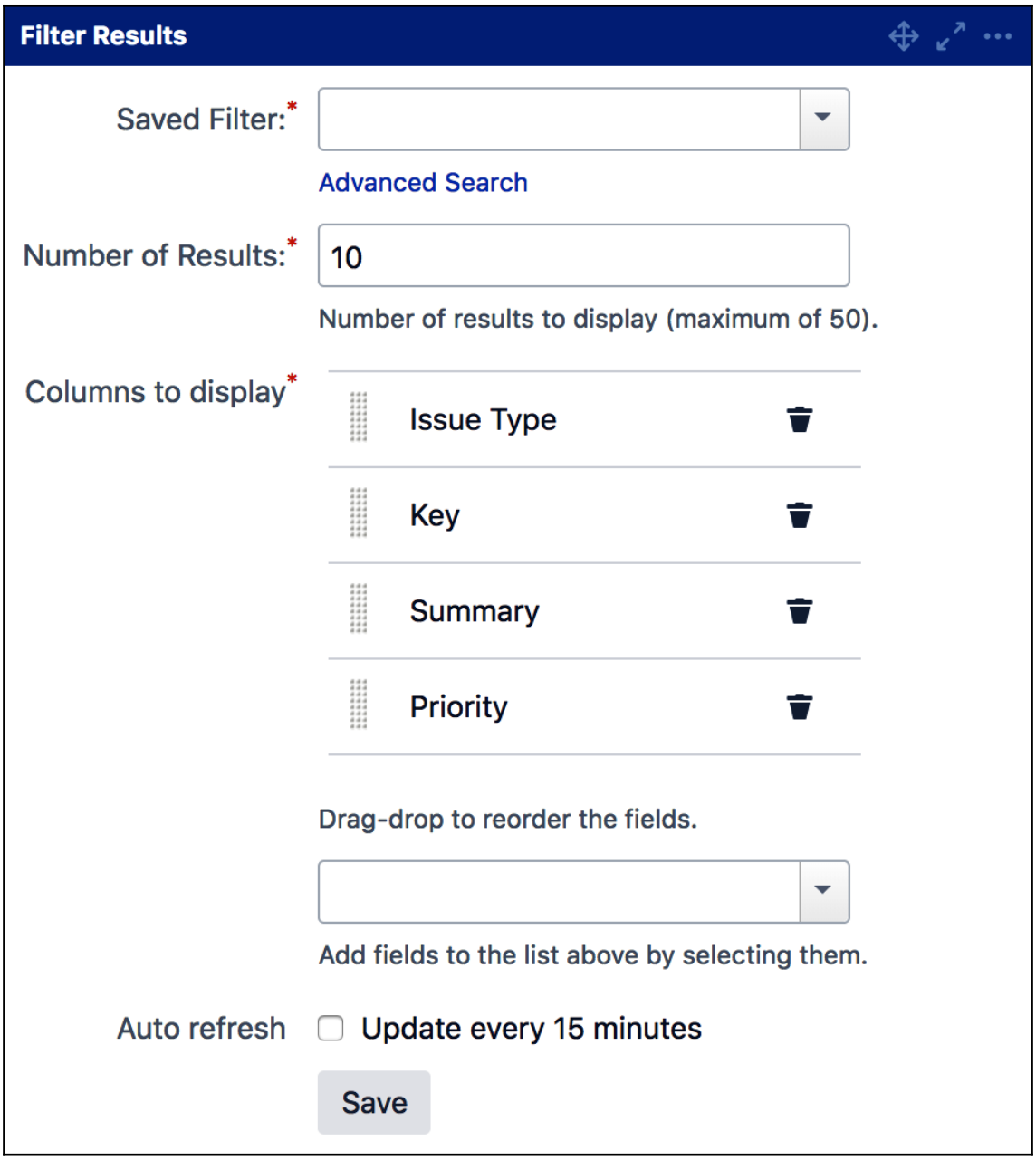

Manage Dashboards
Create new dashboard
Restore Defaults
Favorites
My
Popular
Search
My Dashboards
This page allows you to manage all dashboards you own.
Name
Shared With
Customer Portal
Private Dashboard
Demo Dashboard
Private Dashboard
Help Desk
Private Dashboard

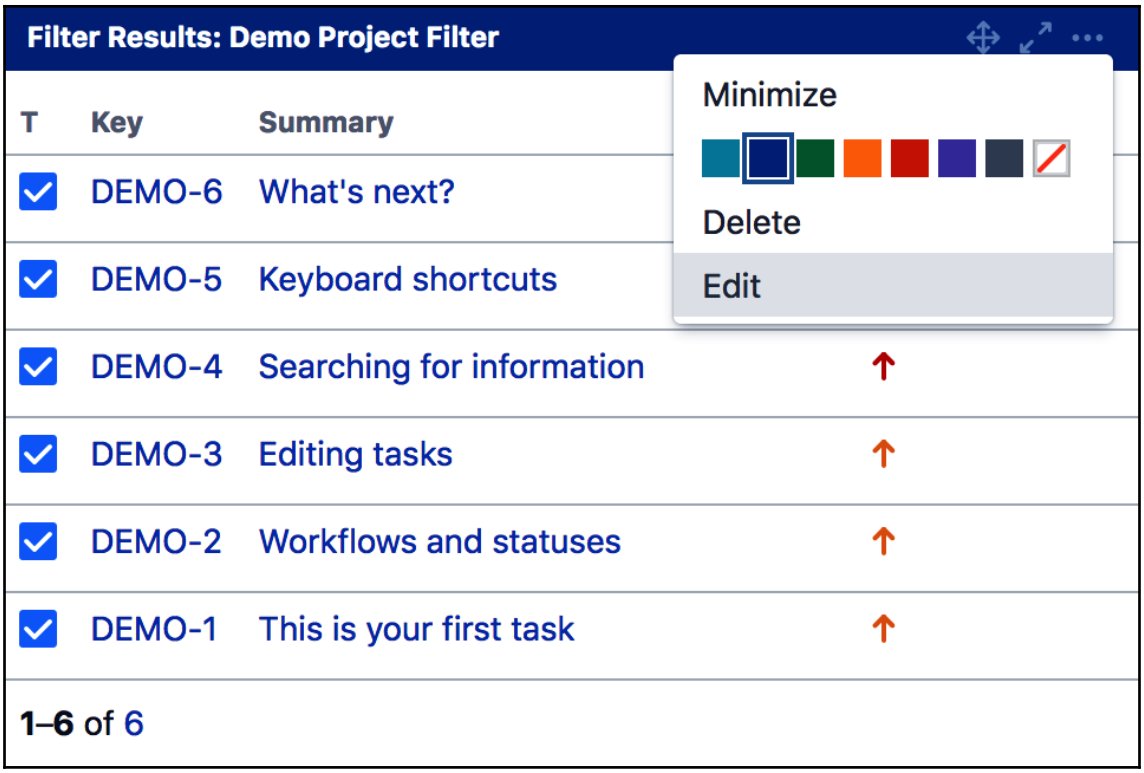

Create New Dashboard
Name*
Project Hummingbird
Description
Start From
Blank dashboard
Choose a dashboard whose gadgets will be copied to the new dashboard.
Alternatively, choose 'Blank dashboard' to create a dashboard with no gadgets.
Favorite
Viewers
Project: Hummingbird
Add Viewers
Project
Hummingbird
All
Add
Editors
Group: hummingbird-managers
make sure you click Add
Add Editors
Group
hummingbird-managers
Add
Add
Cancel


Edit layout
Choose dashboard layout
Close

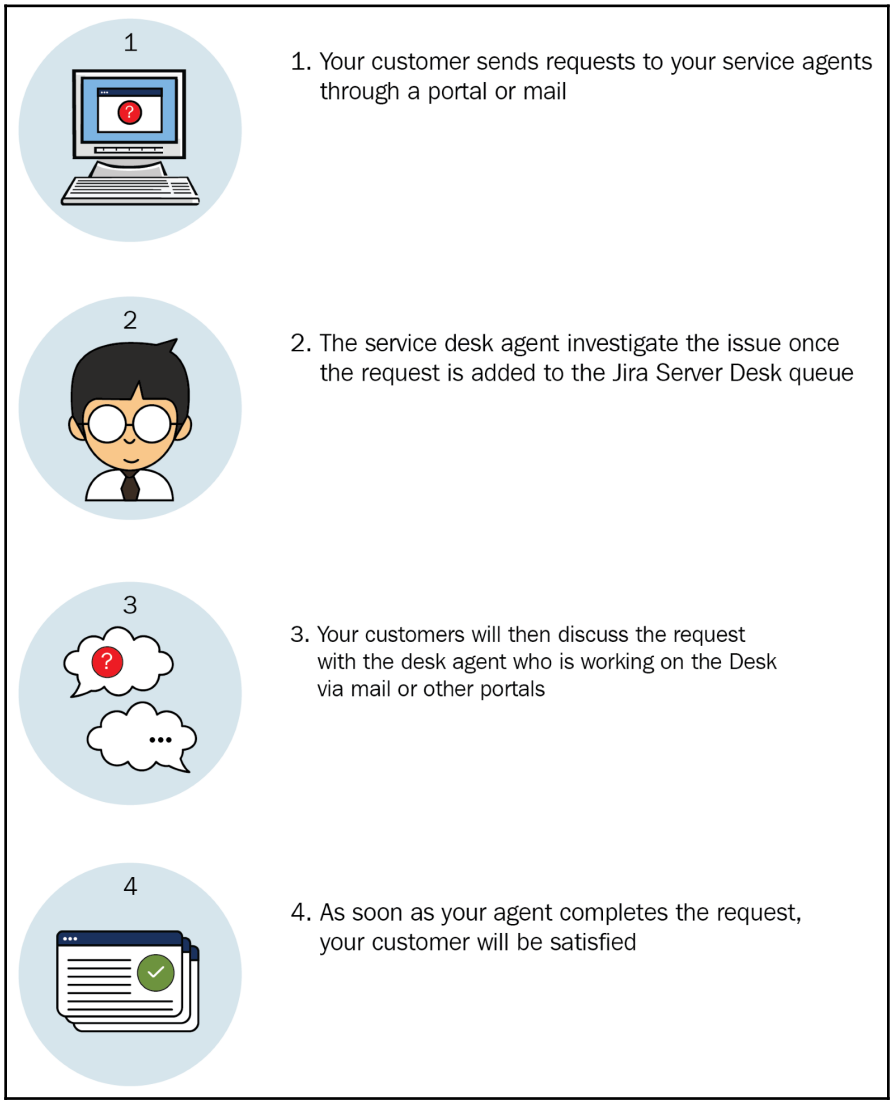

Search Shared Dashboards
Search
Searches in the dashboard's name and description.
Owner
Start typing to get a list of possible matches.
Search
Name
Owner
Shared With
Popularity
Customer Portal
Patrick Li (admin)
Group: jira-software-users (VIEW)
1
Help Desk
Patrick Li (admin)
Group: jira-software-users (VIEW)
Project Hummingbird
Patrick Li (admin)
Project: Hummingbird (VIEW)
Group: hummingbird-managers (EDIT)
Change Owner
Delete Dashboard

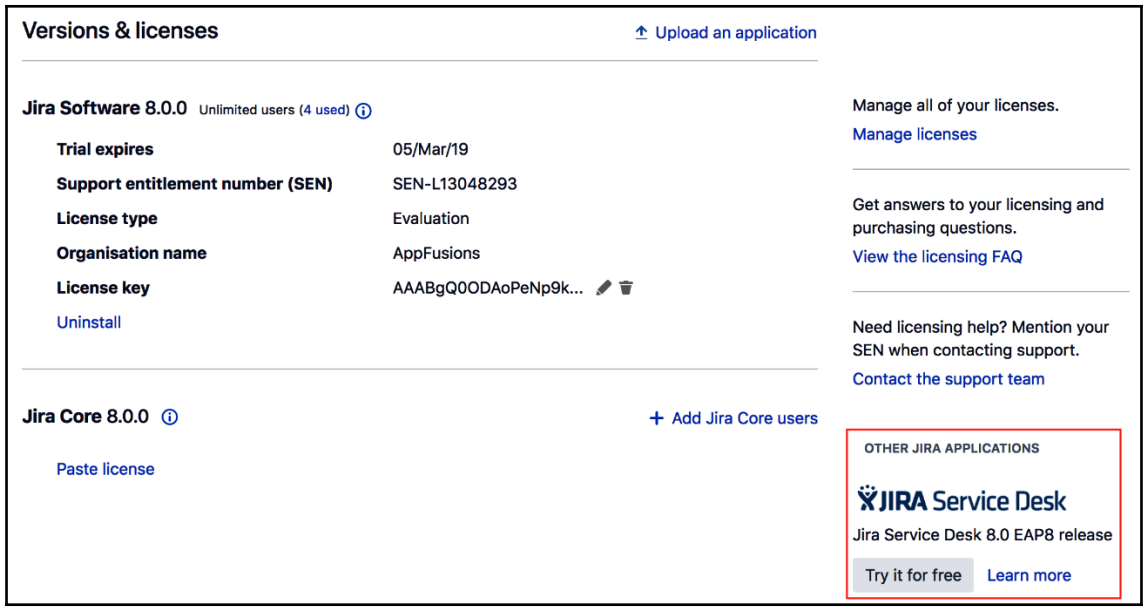

Add a gadget
Manage gadgets
Search
CATEGORIES
All 2
Jira 2
More gadgets available
Additional gadgets have been found and can be loaded.
Load all gadgets
JC-27
Bubble Chart
By Atlassian • Local
Add gadget
Bubble Charts help you identify popular and significant issues by displaying data in four dimensions.
Introduction
Thanks for choosing JIRA.
Where do I start?
Introduction
By Atlassian • Local
Add gadget
An introduction to this installation of Jira.

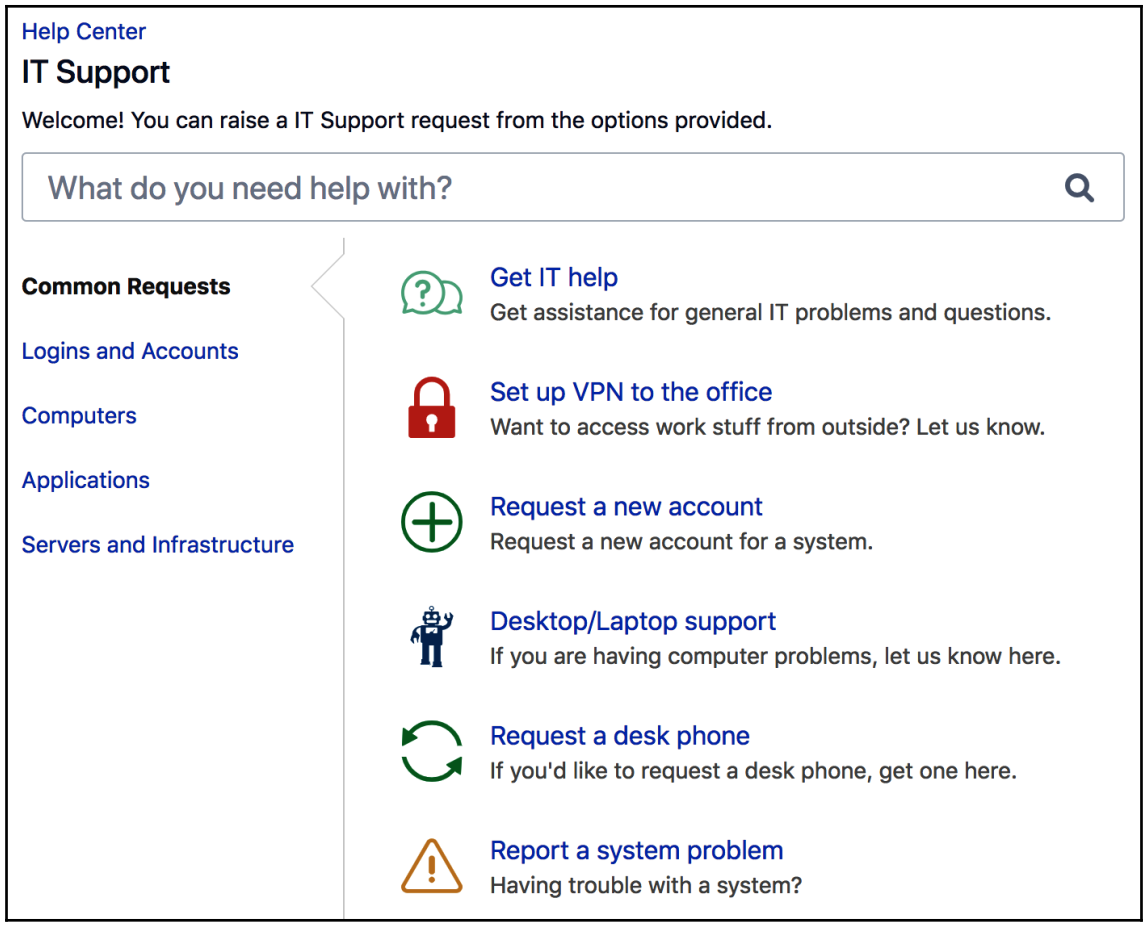

Filter Results
Saved Filter:*
Advanced Search
Number of Results:*
10
Number of results to display (maximum of 50).
Columns to display*
Issue Type
Key
Summary
Priority
Drag-drop to reorder the fields.
Add fields to the list above by selecting them.
Auto refresh
Update every 15 minutes
Save

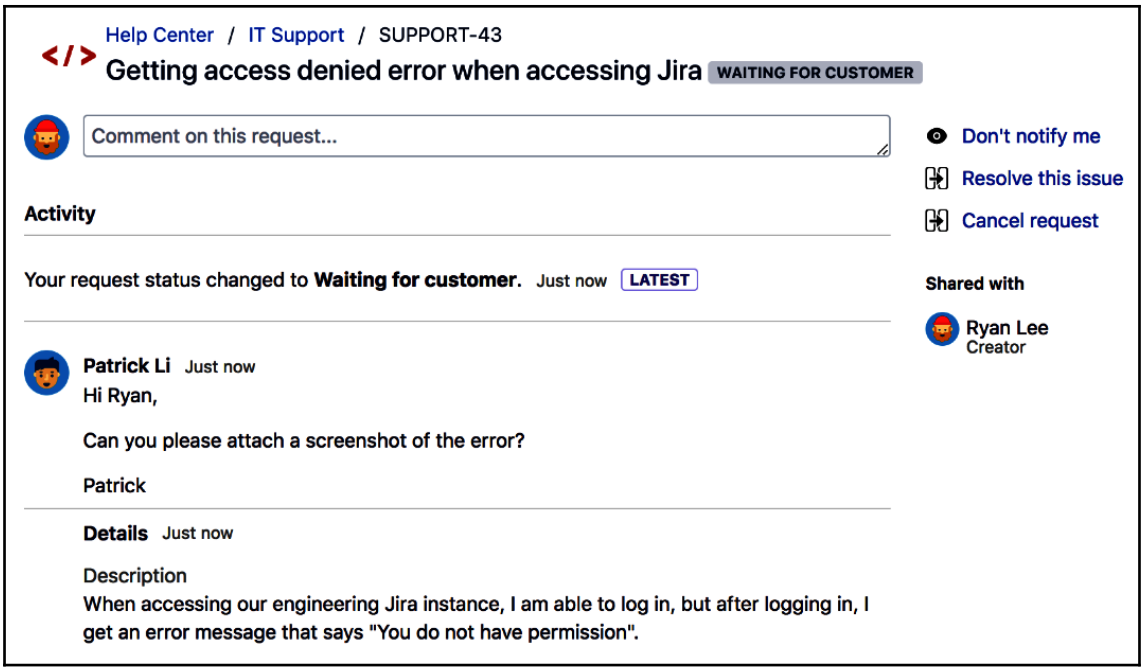

Filter Results: Demo Project Filter
Minimize
Delete
Edit
T
Key
Summary
DEMO-6
What's next?
DEMO-5
Keyboard shortcuts
DEMO-4
Searching for information
DEMO-3
Editing tasks
DEMO-2
Workflows and statuses
DEMO-1
This is your first task
1–6 of 6

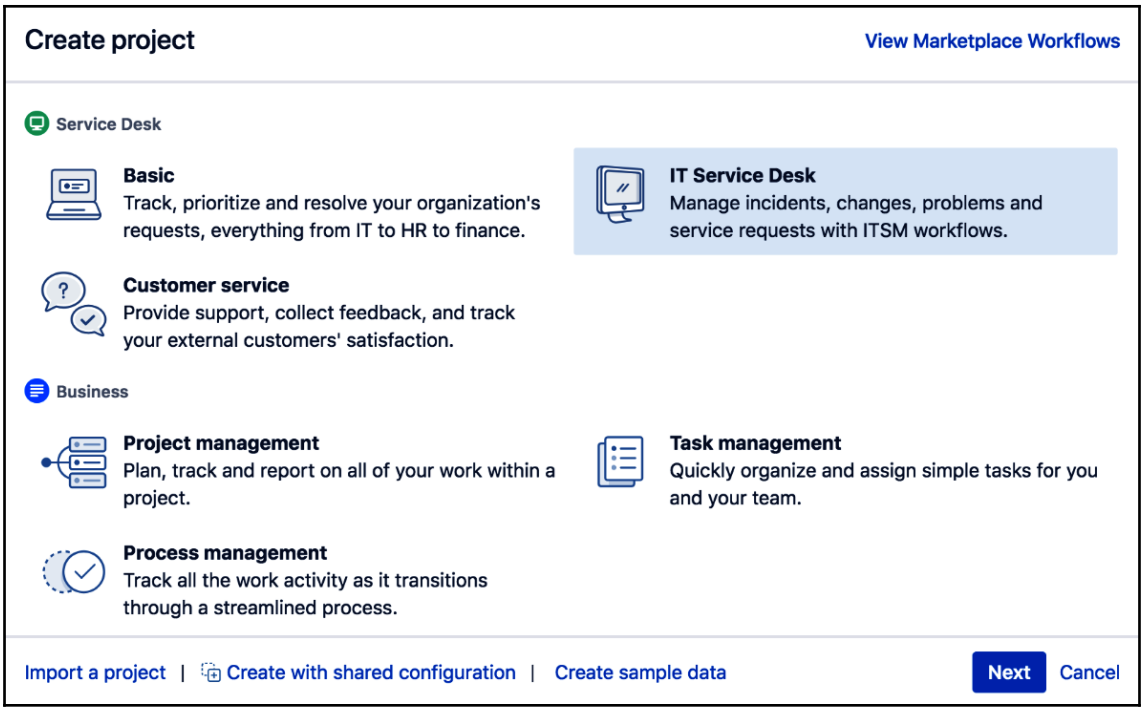
Chapter 11: Jira Service Desk

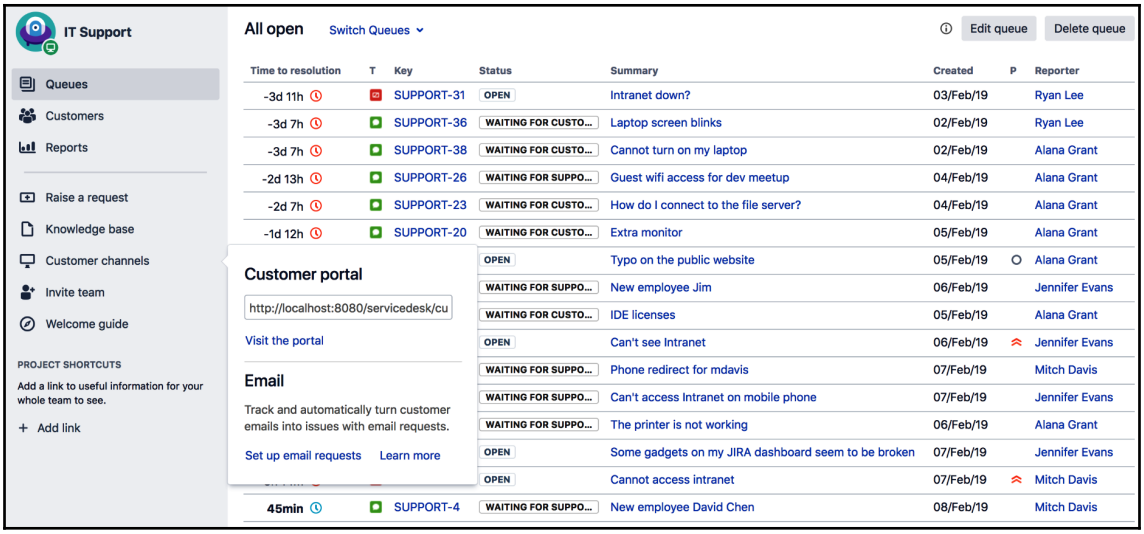


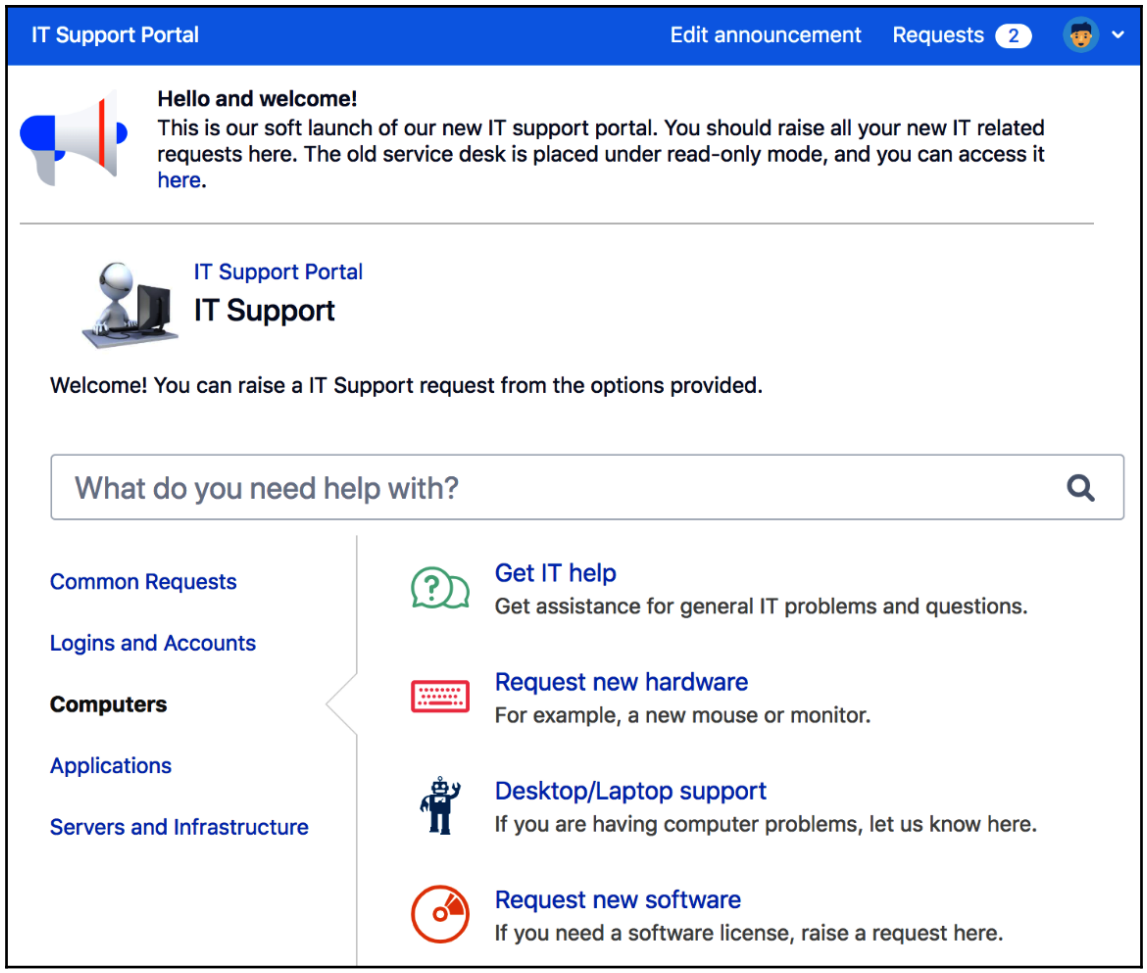

Versions & licenses
Upload an application
Jira Software 8.0.0 Unlimited users (4 used)
Trial expires 05/Mar/19
Support entitlement number (SEN) SEN-L13048293
License type Evaluation
Organisation name AppFusions
License key AAABgQ0ODAoPeNp9k...
Uninstall
Jira Core 8.0.0
Add Jira Core users
Paste license
Manage all of your licenses.
Manage licenses
Get answers to your licensing and purchasing questions.
View the licensing FAQ
Need licensing help? Mention your SEN when contacting support.
Contact the support team
OTHER JIRA APPLICATIONS
JIRA Service Desk
Jira Service Desk 8.0 EAP8 release
Try it for free
Learn more


Help Center
IT Support
Welcome! You can raise a IT Support request from the options provided.
What do you need help with?
Common Requests
Logins and Accounts
Computers
Applications
Servers and Infrastructure
Get IT help
Get assistance for general IT problems and questions.
Set up VPN to the office
Want to access work stuff from outside? Let us know.
Request a new account
Request a new account for a system.
Desktop/Laptop support
If you are having computer problems, let us know here.
Request a desk phone
If you'd like to request a desk phone, get one here.
Report a system problem
Having trouble with a system?


Help Center / IT Support / SUPPORT-43
Getting access denied error when accessing Jira
WAITING FOR CUSTOMER
Comment on this request...
Don't notify me
Resolve this issue
Cancel request
Activity
Your request status changed to Waiting for customer. Just now LATEST
Shared with
Ryan Lee
Creator
Patrick Li Just now
Hi Ryan,
Can you please attach a screenshot of the error?
Patrick
Details Just now
Description
When accessing our engineering Jira instance, I am able to log in, but after logging in, I get an error message that says "You do not have permission".


Create project
View Marketplace Workflows
Service Desk
Basic
Track, prioritize and resolve your organization's requests, everything from IT to HR to finance.
IT Service Desk
Manage incidents, changes, problems and service requests with ITSM workflows.
Customer service
Provide support, collect feedback, and track your external customers' satisfaction.
Business
Project management
Plan, track and report on all of your work within a project.
Task management
Quickly organize and assign simple tasks for you and your team.
Process management
Track all the work activity as it transitions through a streamlined process.
Import a project | Create with shared configuration | Create sample data
Next
Cancel


IT Support
Queues
Customers
Reports
Raise a request
Knowledge base
Customer channels
Invite team
Welcome guide
PROJECT SHORTCUTS
Add a link to useful information for your whole team to see.
+ Add link
All open
Switch Queues
Edit queue
Delete queue
Time to resolution
T
Key
Status
Summary
Created
P
Reporter
-3d 11h SUPPORT-31 OPEN Intranet down? 03/Feb/19 Ryan Lee
-3d 7h SUPPORT-36 WAITING FOR CUSTO... Laptop screen blinks 02/Feb/19 Ryan Lee
-3d 7h SUPPORT-38 WAITING FOR CUSTO... Cannot turn on my laptop 02/Feb/19 Alana Grant
-2d 13h SUPPORT-26 WAITING FOR SUPPO... Guest wifi access for dev meetup 04/Feb/19 Alana Grant
-2d 7h SUPPORT-23 WAITING FOR CUSTO... How do I connect to the file server? 04/Feb/19 Alana Grant
-1d 12h SUPPORT-20 WAITING FOR CUSTO... Extra monitor 05/Feb/19 Alana Grant
OPEN Typo on the public website 05/Feb/19 Alana Grant
WAITING FOR SUPPO... New employee Jim 06/Feb/19 Jennifer Evans
WAITING FOR CUSTO... IDE licenses 05/Feb/19 Alana Grant
OPEN Can't see Intranet 06/Feb/19 Jennifer Evans
WAITING FOR SUPPO... Phone redirect for mdavis 07/Feb/19 Mitch Davis
WAITING FOR SUPPO... Can't access Intranet on mobile phone 07/Feb/19 Jennifer Evans
WAITING FOR SUPPO... The printer is not working 06/Feb/19 Alana Grant
OPEN Some gadgets on my JIRA dashboard seem to be broken 07/Feb/19 Jennifer Evans
OPEN Cannot access intranet 07/Feb/19 Mitch Davis
45min SUPPORT-4 WAITING FOR SUPPO... New employee David Chen 08/Feb/19 Mitch Davis
Customer portal
http://localhost:8080/servicedesk/cu
Visit the portal
Email
Track and automatically turn customer emails into issues with email requests.
Set up email requests
Learn more


IT Support Portal
Edit announcement
Requests 2
Hello and welcome!
This is our soft launch of our new IT support portal. You should raise all your new IT related requests here. The old service desk is placed under read-only mode, and you can access it here.
IT Support Portal
IT Support
Welcome! You can raise a IT Support request from the options provided.
What do you need help with?
Common Requests
Logins and Accounts
Computers
Applications
Servers and Infrastructure
Get IT help
Get assistance for general IT problems and questions.
Request new hardware
For example, a new mouse or monitor.
Desktop/Laptop support
If you are having computer problems, let us know here.
Request new software
If you need a software license, raise a request here.

Portal settings

Look and feel

View and customize the look and feel of your Help Center.

Name

IT Support

Introduction text (optional)

Welcome! You can raise a IT Support request from the options provided.

Logo

☑ Use a custom logo for this Customer Portal

Images are resized to 64 pixels (height)

Change logo

Save logo

Announcements

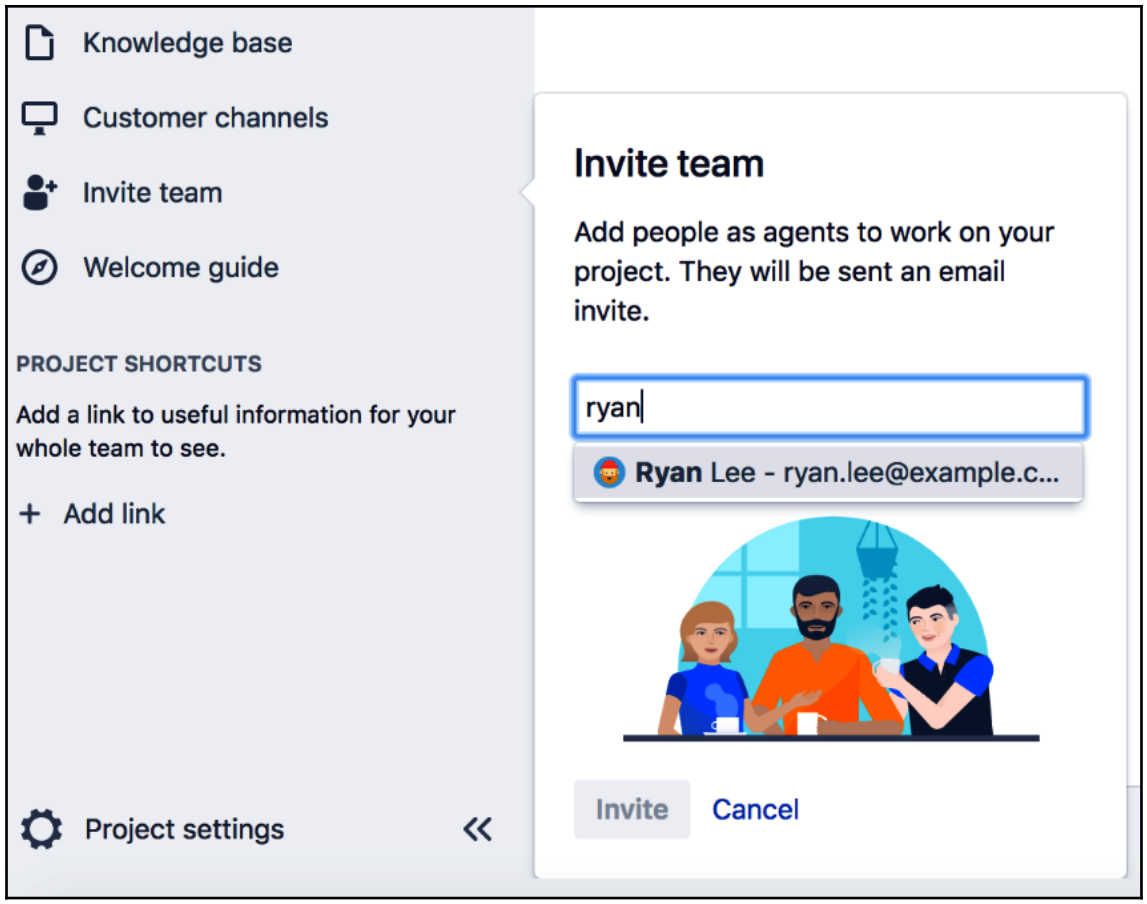
View and change your Customer Portal announcement.

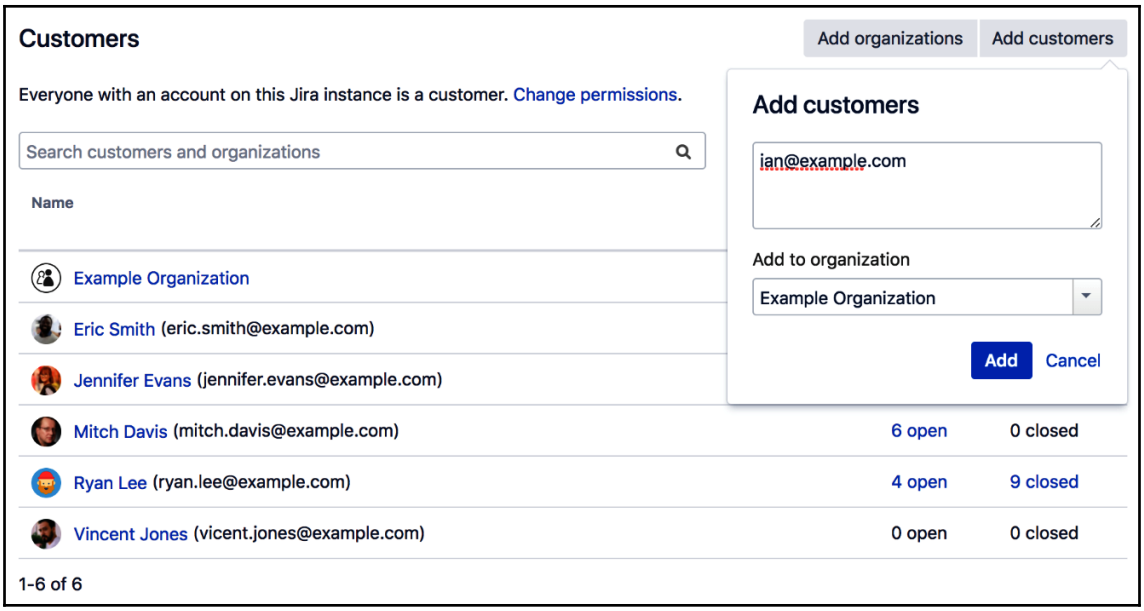
Can agents add announcements to this portal?

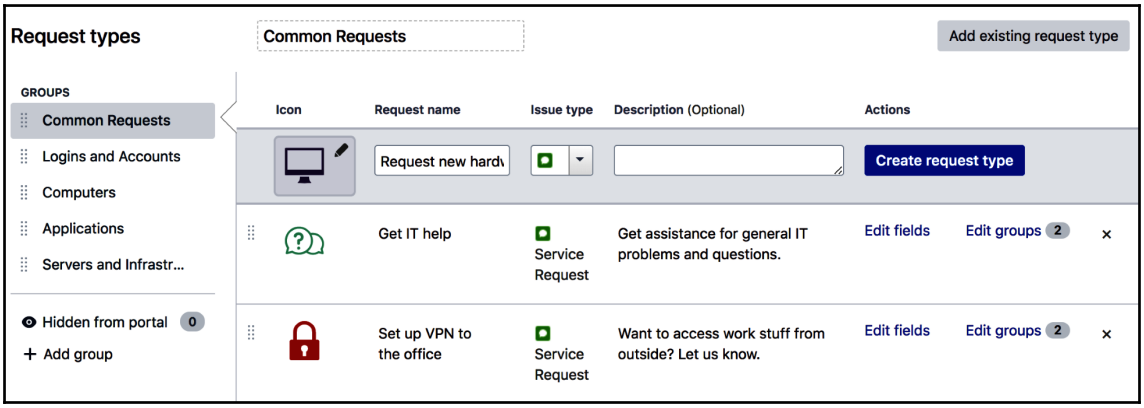
○ Yes, agents can add announcements to this portal

◉ No, only Jira or Project administrators can add announcements to this portal

Agents are not allowed to change the Help Center announcement. You can change this setting on the Jira Service Desk configuration page.


Knowledge base
Customer channels
Invite team
Welcome guide
PROJECT SHORTCUTS
Add a link to useful information for your whole team to see.
+ Add link
Project settings
Invite team
Add people as agents to work on your project. They will be sent an email invite.
ryan
Ryan Lee - ryan.lee@example.c...
Invite
Cancel


Customers
Add organizations
Add customers
Everyone with an account on this Jira instance is a customer. Change permissions.
Search customers and organizations
Name
Example Organization
Eric Smith (eric.smith@example.com)
Jennifer Evans (jennifer.evans@example.com)
Mitch Davis (mitch.davis@example.com) 6 open 0 closed
Ryan Lee (ryan.lee@example.com) 4 open 9 closed
Vincent Jones (vicent.jones@example.com) 0 open 0 closed
1-6 of 6
Add customers
ian@example.com
Add to organization
Example Organization
Add
Cancel


Request types
Common Requests
Add existing request type
GROUPS
Common Requests
Logins and Accounts
Computers
Applications
Servers and Infrastr...
Hidden from portal 0
Add group
Icon
Request name
Issue type
Description (Optional)
Actions
Request new hardv
Create request type
Get IT help
Service Request
Get assistance for general IT problems and questions.
Edit fields
Edit groups 2
Set up VPN to the office
Service Request
Want to access work stuff from outside? Let us know.
Edit fields
Edit groups 2

Help Center

IT Support

Welcome! You can raise a IT Support request from the options provided.

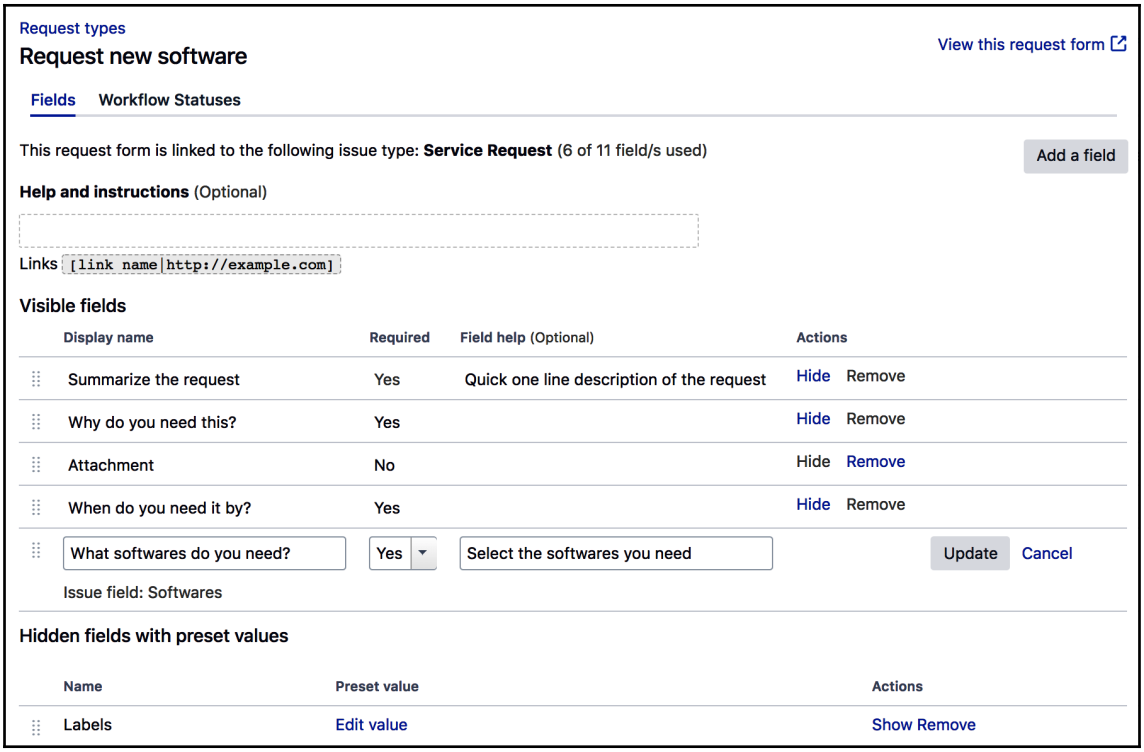
What do you need help with?

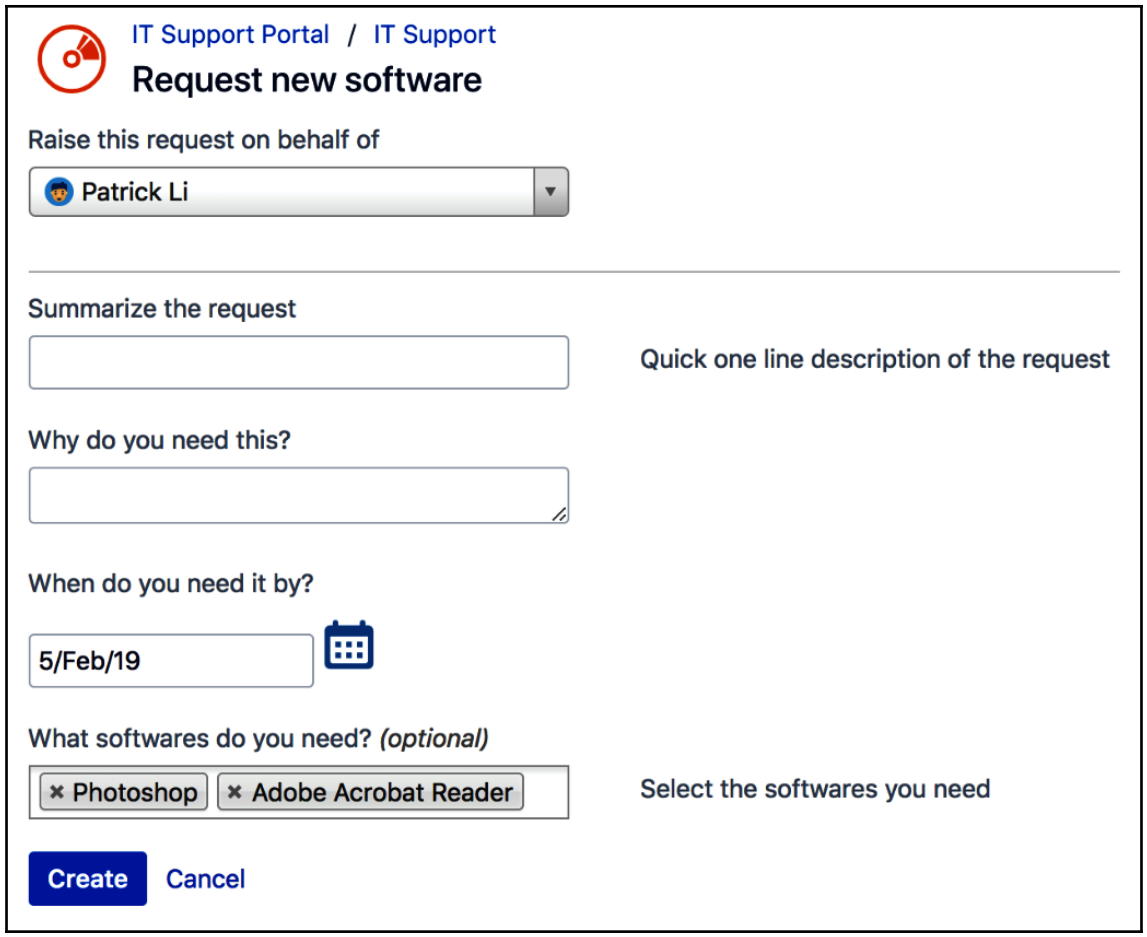
- Common Requests
- Logins and Accounts
- Computers
- Applications
- Servers and Infrastructure
- **Sample Group**

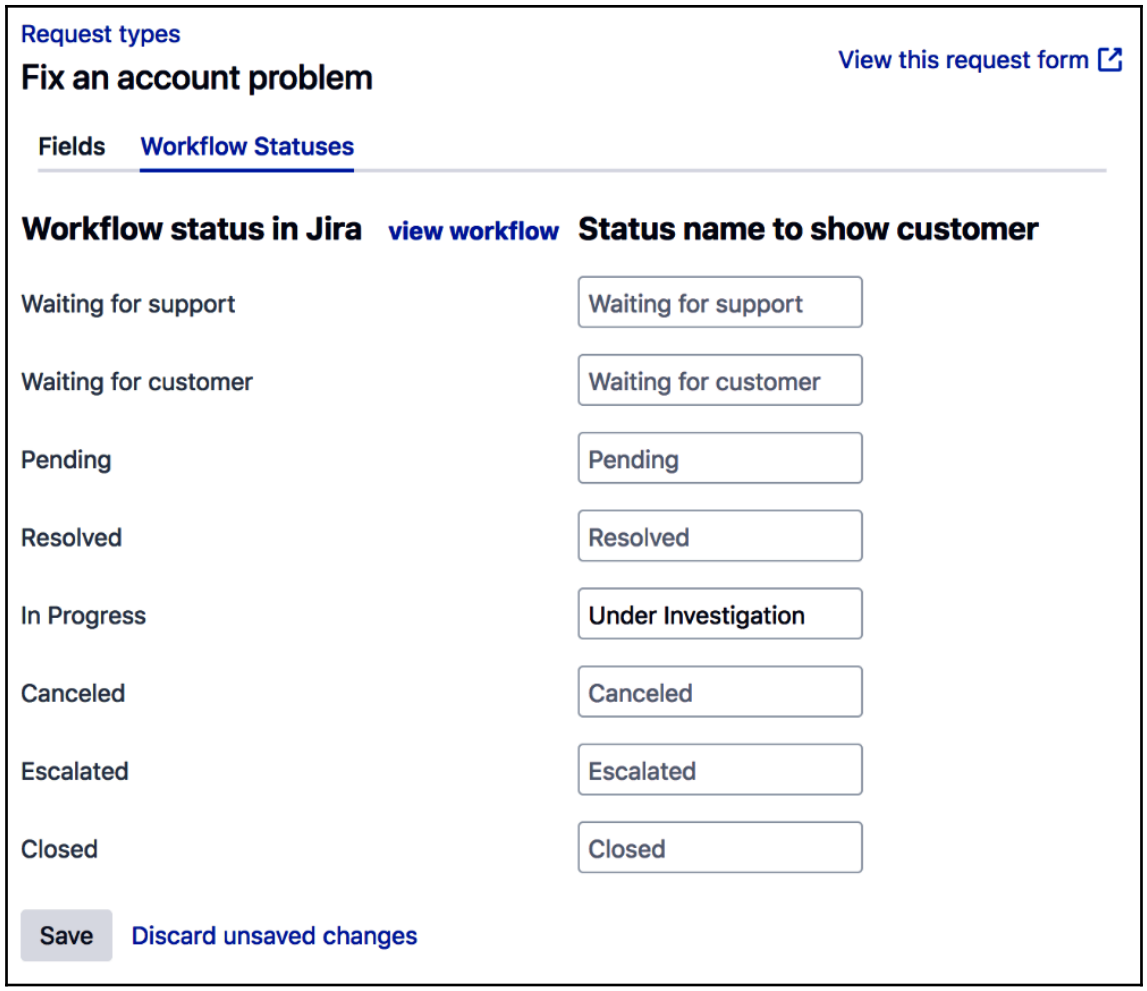
Sample Change
Request change to an existing IT system, such as an upgrade.

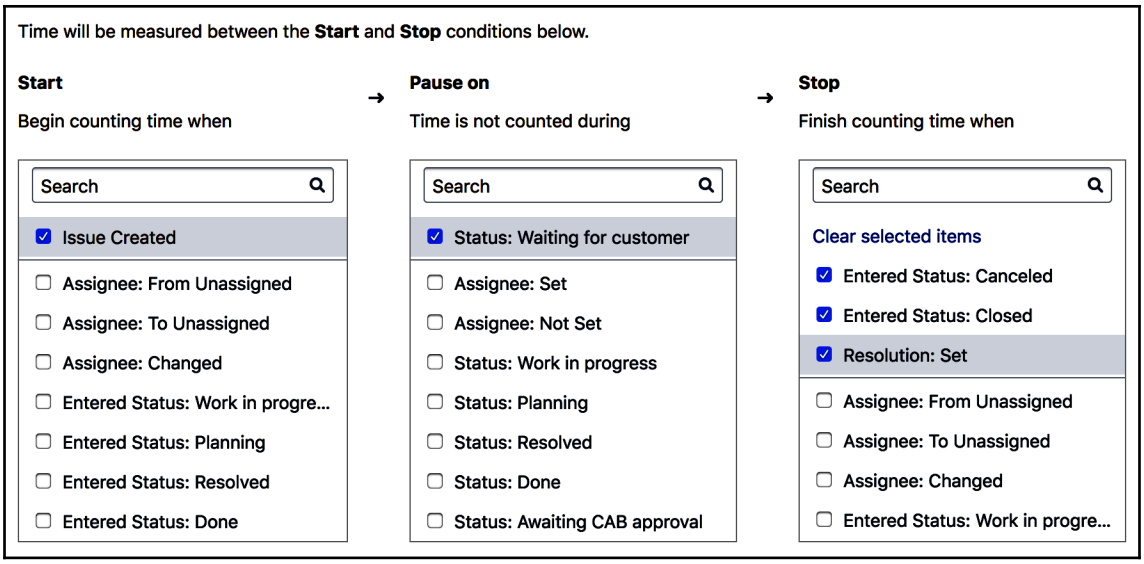
Sample Incident
Report problem or incident encountered with IT systems.

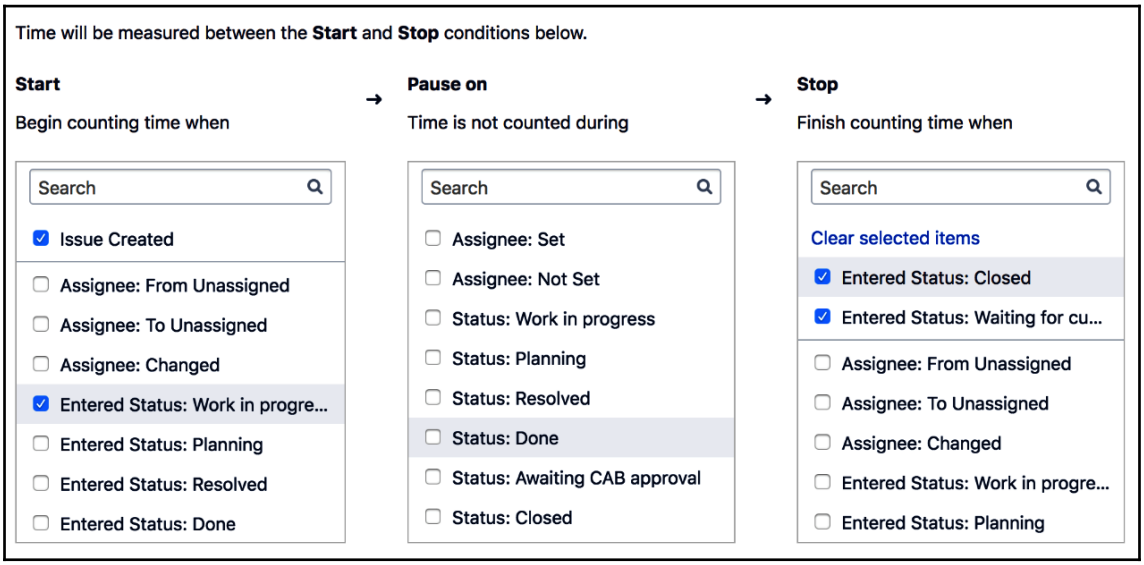
Sampel Request
Request assistance from IT team.

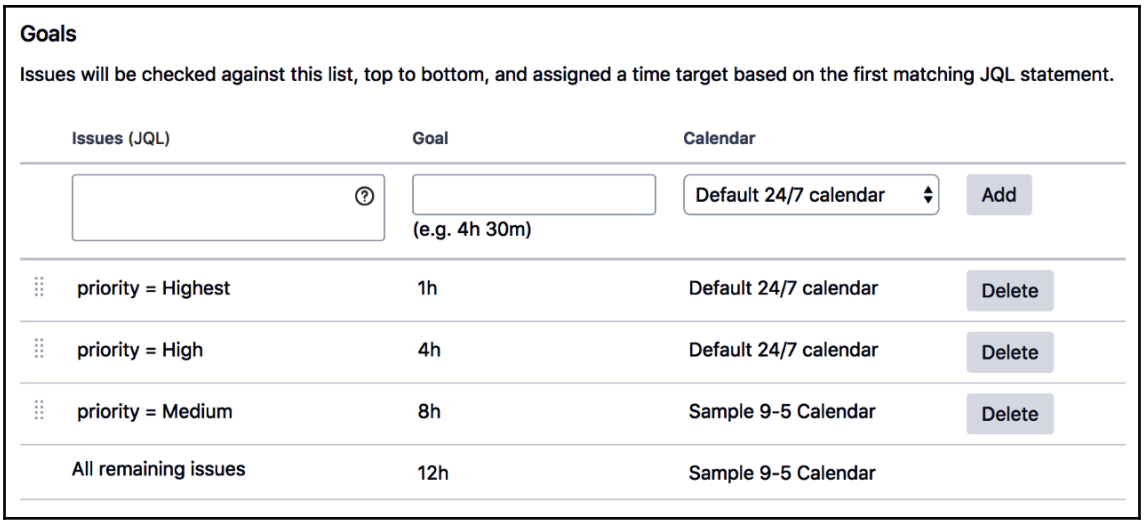

Request types
Request new software
View this request form
Fields
Workflow Statuses
This request form is linked to the following issue type: Service Request (6 of 11 field/s used)
Add a field
Help and instructions (Optional)
Links [link name|http://example.com]
Visible fields
Display name
Required
Field help (Optional)
Actions
Summarize the request
Yes
Quick one line description of the request
Hide
Remove
Why do you need this?
Yes
Hide
Remove
Attachment
No
Hide
Remove
When do you need it by?
Yes
Hide
Remove
What softwares do you need?
Yes
Select the softwares you need
Update
Cancel
Issue field: Softwares
Hidden fields with preset values
Name
Preset value
Actions
Labels
Edit value
Show
Remove

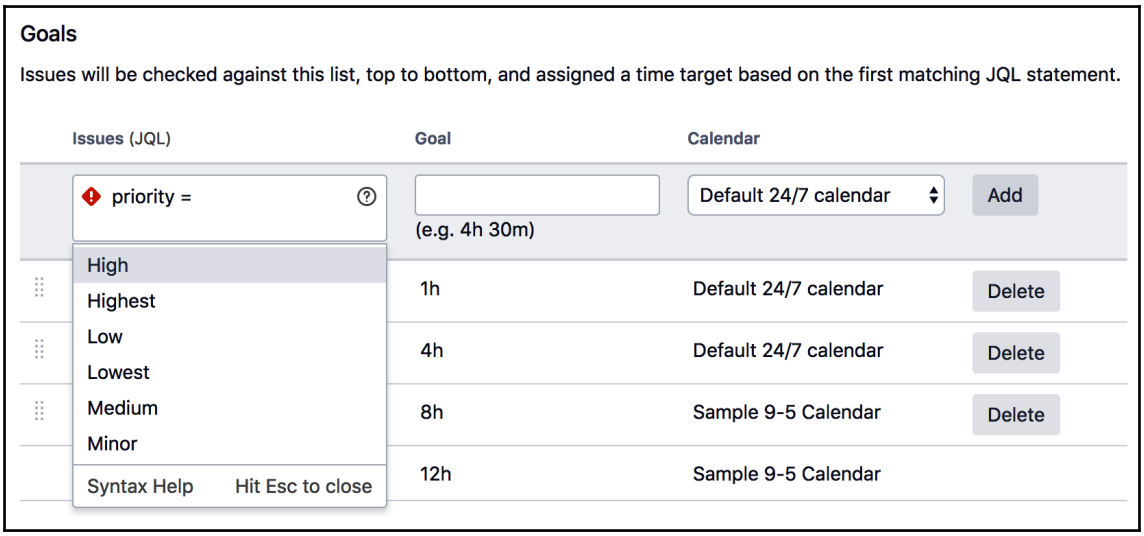

IT Support Portal / IT Support
Request new software
Raise this request on behalf of
Patrick Li
Summarize the request
Quick one line description of the request
Why do you need this?
When do you need it by?
5/Feb/19
What softwares do you need? (optional)
× Photoshop
× Adobe Acrobat Reader
Select the softwares you need
Create
Cancel

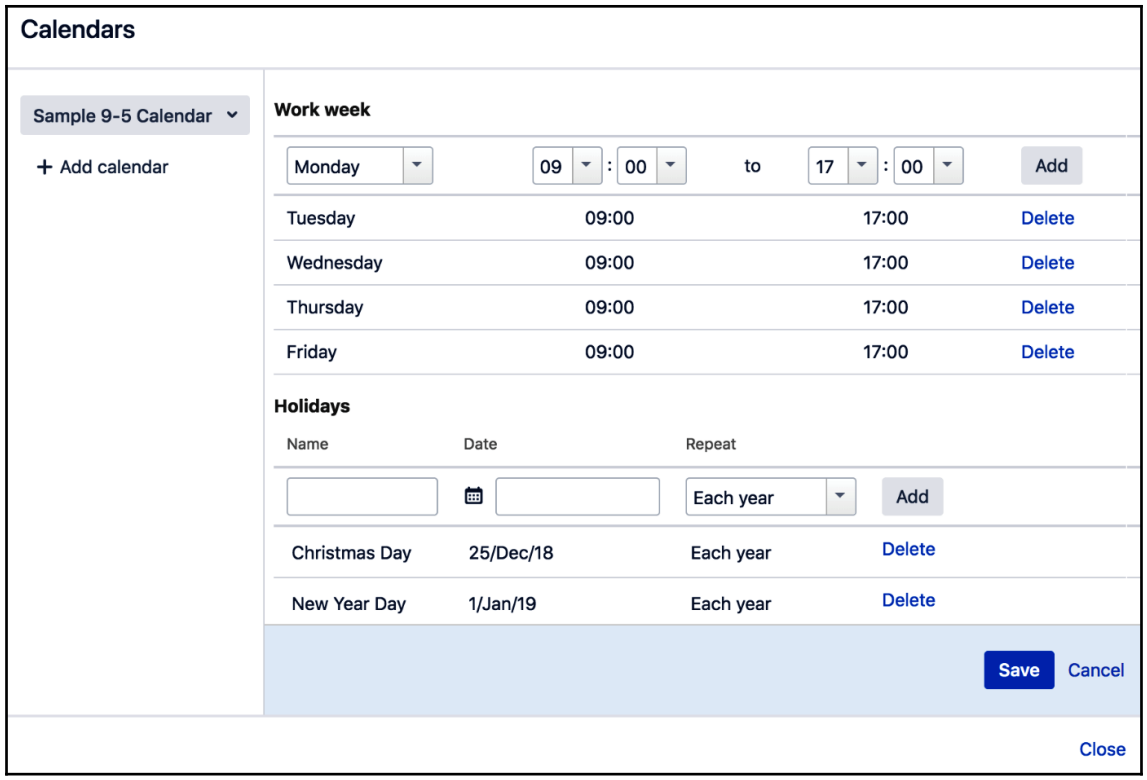

Request types
Fix an account problem
View this request form
Fields
Workflow Statuses
Workflow status in Jira
view workflow
Status name to show customer
Waiting for support
Waiting for support
Waiting for customer
Waiting for customer
Pending
Pending
Resolved
Resolved
In Progress
Under Investigation
Canceled
Canceled
Escalated
Escalated
Closed
Closed
Save
Discard unsaved changes

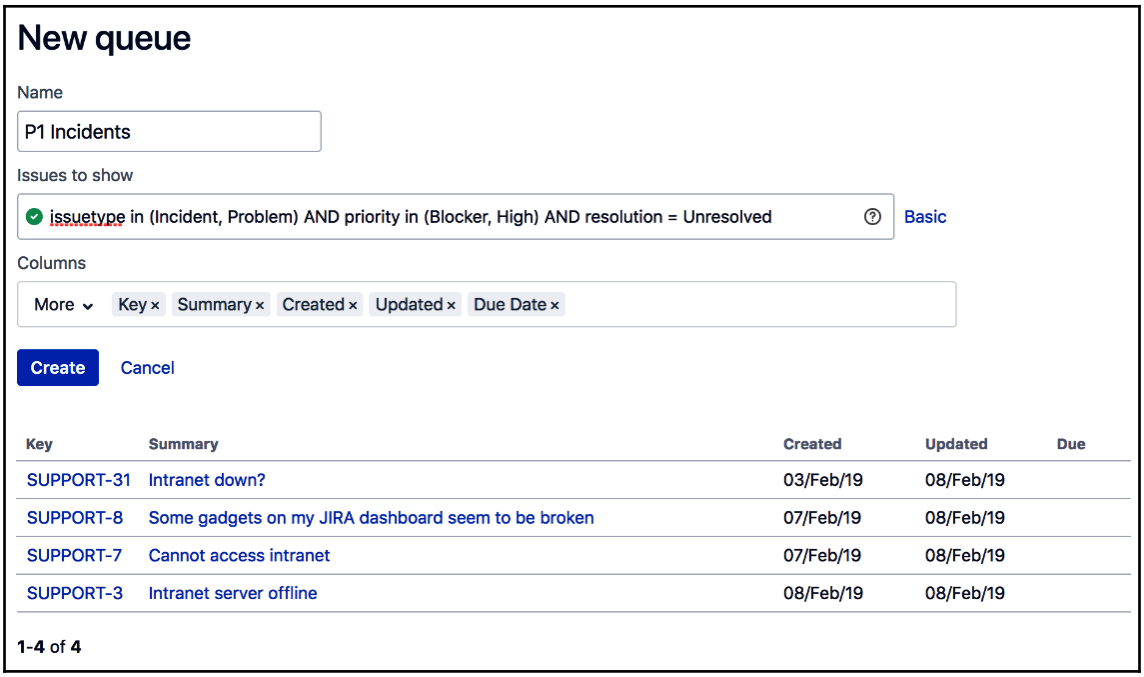

Time will be measured between the Start and Stop conditions below.
Start
Begin counting time when
Pause on
Time is not counted during
Stop
Finish counting time when
Search
Issue Created
Assignee: From Unassigned
Assignee: To Unassigned
Assignee: Changed
Entered Status: Work in progre...
Entered Status: Planning
Entered Status: Resolved
Entered Status: Done
Search
Status: Waiting for customer
Assignee: Set
Assignee: Not Set
Status: Work in progress
Status: Planning
Status: Resolved
Status: Done
Status: Awaiting CAB approval
Search
Clear selected items
Entered Status: Canceled
Entered Status: Closed
Resolution: Set
Assignee: From Unassigned
Assignee: To Unassigned
Assignee: Changed
Entered Status: Work in progre...


Time will be measured between the Start and Stop conditions below.
Start
Begin counting time when
Pause on
Time is not counted during
Stop
Finish counting time when
Search
Issue Created
Assignee: From Unassigned
Assignee: To Unassigned
Assignee: Changed
Entered Status: Work in progre...
Entered Status: Planning
Entered Status: Resolved
Entered Status: Done
Search
Assignee: Set
Assignee: Not Set
Status: Work in progress
Status: Planning
Status: Resolved
Status: Done
Status: Awaiting CAB approval
Status: Closed
Search
Clear selected items
Entered Status: Closed
Entered Status: Waiting for cu...
Assignee: From Unassigned
Assignee: To Unassigned
Assignee: Changed
Entered Status: Work in progre...
Entered Status: Planning

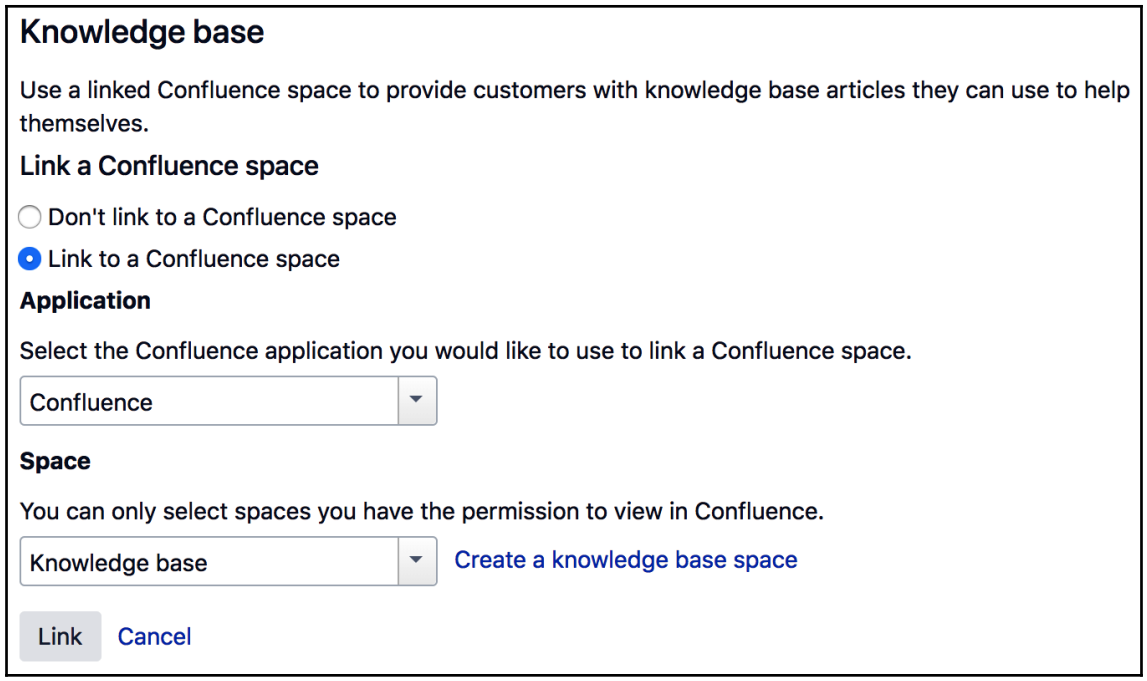

Goals
Issues will be checked against this list, top to bottom, and assigned a time target based on the first matching JQL statement.
Issues (JQL)
Goal
Calendar
Default 24/7 calendar
Add
(e.g. 4h 30m)
priority = Highest
1h
Default 24/7 calendar
Delete
priority = High
4h
Default 24/7 calendar
Delete
priority = Medium
8h
Sample 9-5 Calendar
Delete
All remaining issues
12h
Sample 9-5 Calendar


Goals
Issues will be checked against this list, top to bottom, and assigned a time target based on the first matching JQL statement.
Issues (JQL)
Goal
Calendar
priority =
Default 24/7 calendar
Add
(e.g. 4h 30m)
High
Highest
Low
Lowest
Medium
Minor
Syntax Help
Hit Esc to close
1h
Default 24/7 calendar
Delete
4h
Default 24/7 calendar
Delete
8h
Sample 9-5 Calendar
Delete
12h
Sample 9-5 Calendar

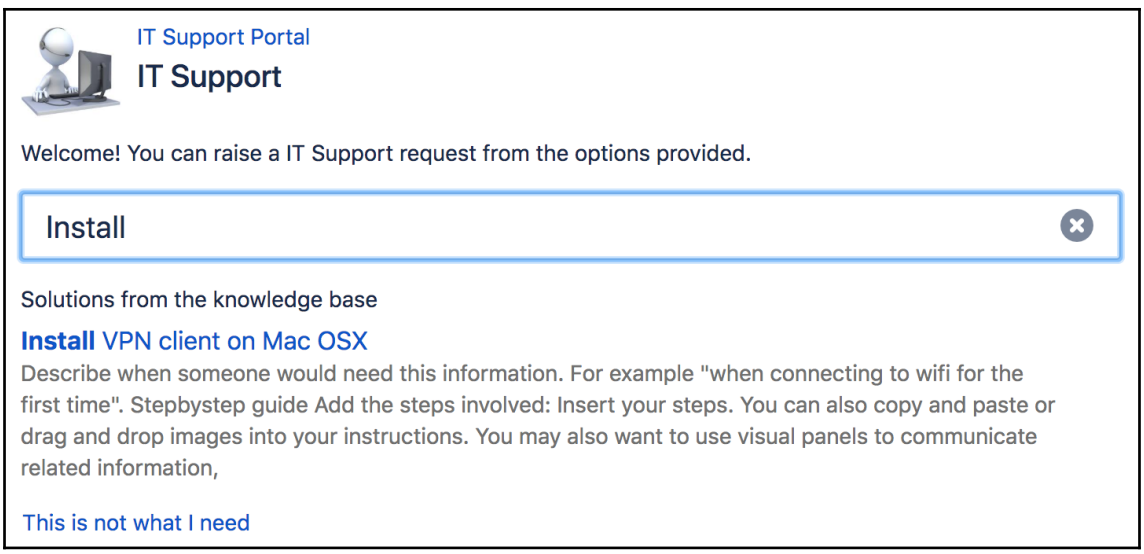

Calendars
Sample 9-5 Calendar
+ Add calendar
Work week
Monday
09
00
to
17
00
Add
Tuesday 09:00 17:00 Delete
Wednesday 09:00 17:00 Delete
Thursday 09:00 17:00 Delete
Friday 09:00 17:00 Delete
Holidays
Name
Date
Repeat
Each year
Add
Christmas Day 25/Dec/18 Each year Delete
New Year Day 1/Jan/19 Each year Delete
Save
Cancel
Close

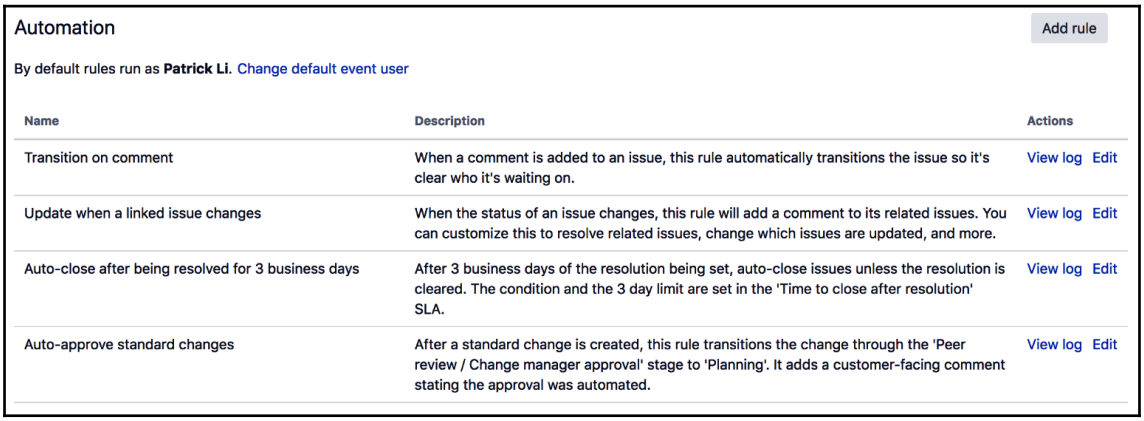

New queue
Name
P1 Incidents
Issues to show
issuetype in (Incident, Problem) AND priority in (Blocker, High) AND resolution = Unresolved
Basic
Columns
More
Key ×
Summary ×
Created ×
Updated ×
Due Date ×
Create
Cancel
Key
Summary
Created
Updated
Due
SUPPORT-31
Intranet down?
03/Feb/19
08/Feb/19
SUPPORT-8
Some gadgets on my JIRA dashboard seem to be broken
07/Feb/19
08/Feb/19
SUPPORT-7
Cannot access intranet
07/Feb/19
08/Feb/19
SUPPORT-3
Intranet server offline
08/Feb/19
08/Feb/19
1-4 of 4

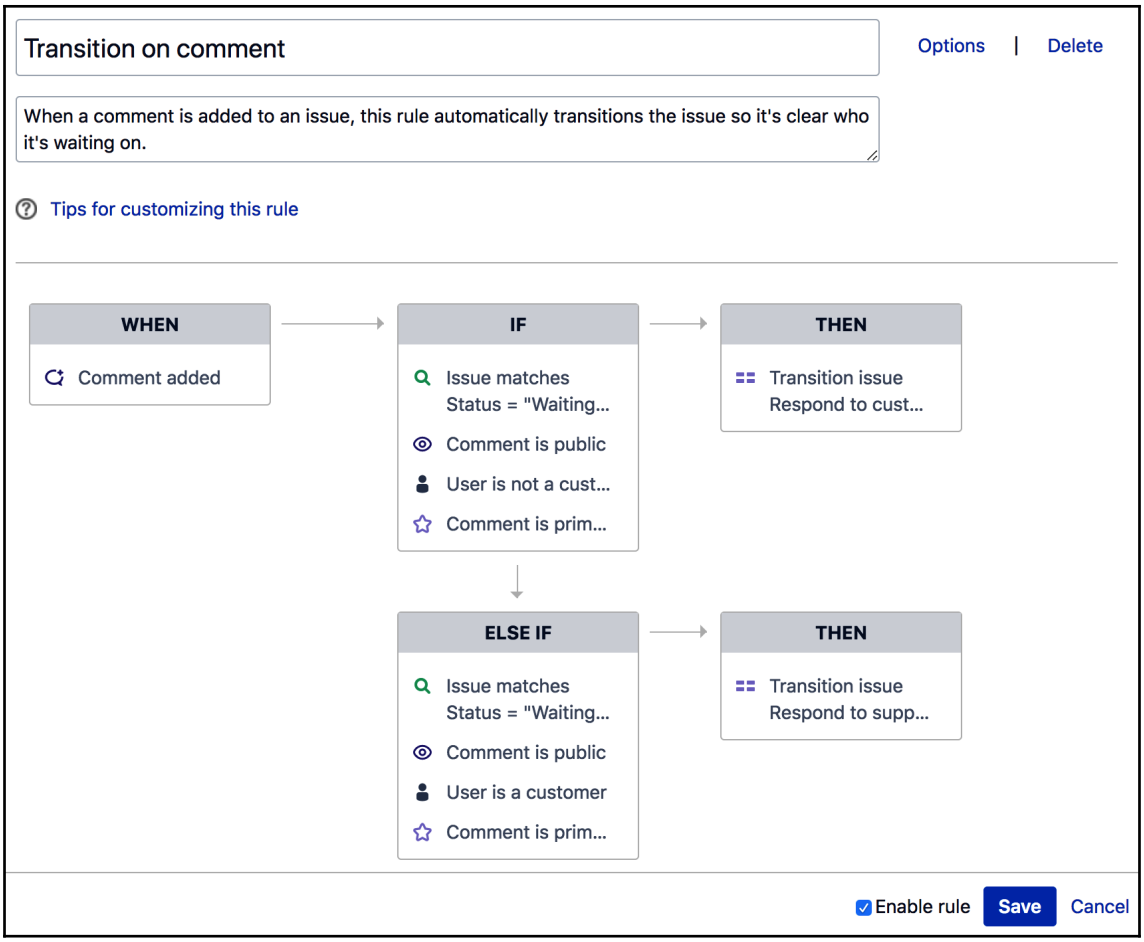
Configure Application Links
Give Feedback
Enter the URL of the application you want to link
Create new link
Application
Version
Status
Actions
Confluence
PRIMARY
Confluence 6.12.2
CONNECTED


Knowledge base
Use a linked Confluence space to provide customers with knowledge base articles they can use to help themselves.
Link a Confluence space
Don't link to a Confluence space
Link to a Confluence space
Application
Select the Confluence application you would like to use to link a Confluence space.
Confluence
Space
You can only select spaces you have the permission to view in Confluence.
Knowledge base
Create a knowledge base space
Link
Cancel

Votes:
Related knowledge base articles
No related articles found.
Didn't find a suitable article? Search knowledge base or create an article.
Install VPN client on Mac OSX
How-To
Create
Cancel
Activity
All
Comments
Work Log
History
Activity
Dates


IT Support Portal
IT Support
Welcome! You can raise a IT Support request from the options provided.
Install
Solutions from the knowledge base
Install VPN client on Mac OSX
Describe when someone would need this information. For example "when connecting to wifi for the first time". Stepbystep guide Add the steps involved: Insert your steps. You can also copy and paste or drag and drop images into your instructions. You may also want to use visual panels to communicate related information,
This is not what I need


Automation
Add rule
By default rules run as Patrick Li. Change default event user
Name
Description
Actions
Transition on comment
When a comment is added to an issue, this rule automatically transitions the issue so it's clear who it's waiting on.
View log Edit
Update when a linked issue changes
When the status of an issue changes, this rule will add a comment to its related issues. You can customize this to resolve related issues, change which issues are updated, and more.
View log Edit
Auto-close after being resolved for 3 business days
After 3 business days of the resolution being set, auto-close issues unless the resolution is cleared. The condition and the 3 day limit are set in the 'Time to close after resolution' SLA.
View log Edit
Auto-approve standard changes
After a standard change is created, this rule transitions the change through the 'Peer review / Change manager approval' stage to 'Planning'. It adds a customer-facing comment stating the approval was automated.
View log Edit


Transition on comment
Options | Delete
When a comment is added to an issue, this rule automatically transitions the issue so it's clear who it's waiting on.
Tips for customizing this rule
WHEN
Comment added
IF
Issue matches Status = "Waiting...
Comment is public
User is not a cust...
Comment is prim...
THEN
Transition issue Respond to cust...
ELSE IF
Issue matches Status = "Waiting...
Comment is public
User is a customer
Comment is prim...
THEN
Transition issue Respond to supp...
Enable rule
Save
Cancel