



03 **INTRODUCTION**

04 **GETTING STARTED**

05 **SEARCHING**

06 **PROJECTS**

07 **ADVANCED LEARNING**



INTRODUCTION

This white paper has one simple objective — to provide you with guidance on getting started with Jira in under 30 minutes!

Atlassian's famed workflow management application, Jira, gives users the ability to prioritise, assign, track, report and audit 'issues' (or tickets as they are otherwise known).

Millions of organisations choose Jira to improve their collaboration efforts and advance their project management capabilities. As an Atlassian Platinum Solution Partner, Clearvision has conducted a number of Jira training courses for businesses of all sizes.



GETTING STARTED

While this white paper includes everything intended to help the new user get started, a Jira training course is still recommended to ensure that all of the features and functionalities of the application are fully utilised.

Before we explore the more in-depth courses, let's cover the basics.

STEP 1: SETTING UP YOUR DASHBOARD

The first thing you'll notice when you log in to Jira is your Dashboard. This is customisable and worth taking a few minutes to make your own.

In addition to being able to change the layout, you'll notice the '+Add Gadget' button. Atlassian provides a number of Gadgets to choose from, allowing information to be displayed in a way that you prefer. Users have the option to download more if they wish to.

Gadgets bring a range of customisations to Jira, with the 'Assigned to me' Gadget being a popular one for displaying unresolved tickets that have been assigned to you. Another popular Gadget is 'Pie Chart' — simply customised to display issue types, projects and more.

Note: You can edit, minimise or remove a Gadget by clicking on the top right of the box.

STEP 2: CREATING AND ASSIGNING ISSUES

Firstly, what is an 'issue'? An issue is basically a task — something that needs to be done. Businesses use Jira in different ways but generally, issues are included as part of a wider project and are assigned a level of priority.

There are a number of fields we could delve into but we've only got 30 minutes so let's focus on the most important ones!

o **Issue type:** A simple way of breaking down what type of task it is, e.g. bug, improvement or new feature.

o **Priority:** How important is the ticket? Is it blocking progress or is it cosmetic? You'll be able to categorise this here. Issues can be voted on for collectively deciding on the importance of a task.

o **Status:** How the ticket is progressing. This allows the issue owner (often management) to track progress. Tickets usually run through a 'workflow' set up by the admin and should be discussed to avoid error (more on this below).

o **Resolution:** How you let the assignee know when a ticket has been completed. Your admin will be able to tell you what resolutions mean in your workflow.

o **Watching an issue:** When a ticket has been created and assigned, you'll automatically start 'watching' it. This means that whenever work is carried out on the ticket you will receive a notification. Additional watchers can be added to a ticket, and if for some reason you don't want to receive notifications about when a specific ticket has been transitioned, i.e. when work has been logged or when a comment has been added, you can modify the 'watching' option within your profile settings. Again, those involved can vote on issues to collectively decide on the importance of a task.

BLURRED VISION

If you're having trouble viewing or adding 'watchers' or 'voters', it might be worth checking out your permissions.

Permissions are set by the Jira admin at the project and global level, so if you are unable to watch an issue, it's worth speaking to the admin.



SEARCHING

Now you know how to create and assign tickets, let's explore how to find them.

The search function in Jira is powerful, but at an elementary level, you only really need to understand 'quick' and 'basic' search.

QUICK SEARCH

This is the search box in the top right-hand side of your screen. It allows you to jump straight to an issue, complete a 'smart query' and more.

It's worth noting that issues in Jira are assigned 'keys' (e.g. ABC-123) and if you search for this and hit enter you'll be taken straight to that issue.

The more you become familiar with Jira, the more you'll learn 'smart querying' — a series of search terms that enable you to filter results. For example, a search for "my" will find issues that have been assigned to you.

BASIC SEARCH

Select issues from the menu, and 'search for issues'. The search function works similarly to 'quick search' but, with the 'basic search', you get a series of fields to filter results.

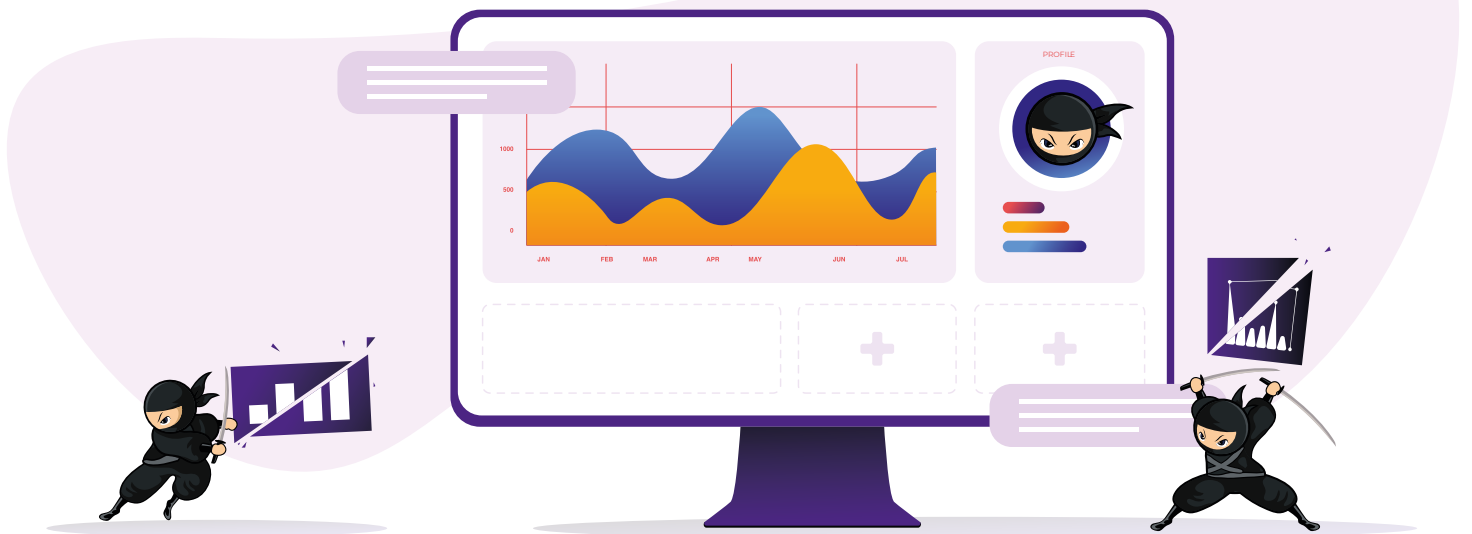
Tick the field you want or, if you cannot see it, simply search for it. This is a great way to find a ticket within a project or tickets assigned to you. The page will auto-update as you go along.

ADVANCED SEARCH

This uses Jira Query Language (JQL) and allows you to dig a lot deeper. For more information regarding this, please enquire about our advanced training course.

For the purposes of this white paper, it is assumed that you already have had a project assigned to you by your administrator. The project page is often the space in which the majority of Jira users spend their time.

PROJECTS



From the project Dashboard, you'll be able to view issues, Releases and Components, along with anything else relating to that particular project.

Jira Reports reveal statistics for specific individuals, projects, versions, or other fields within issues. Similar to the Gadgets displaying information on your Dashboard, Reports display relevant information on the Report screen.

There are a number of Reports that are out of the box including Time Sheets, Workload Pie Charts, and so on. These can all be created through the project screen by selecting the relevant criteria.

If you cannot find what you are looking for, you should visit the Atlassian Marketplace or speak to an expert at Clearvision.



ADVANCED LEARNING

From advanced searching to creating and managing projects, there's a lot to learn about Jira. As outlined at the beginning of this white paper, you'll want to consider an advanced course to expand on your knowledge. Courses are available at admin level for new and experienced users.

WHAT'S INCLUDED IN ADVANCED COURSES WITH CLEARVISION?

Jira has powerful issue and bug tracking capabilities which we urge you to take advantage of.

Included in our advanced courses:

AGILE WITH JIRA SOFTWARE ESSENTIALS (AVAILABLE FOR CLOUD AND SERVER)

This training course is designed for those who've acquired knowledge from this white paper but who would like to expand on their learnings through a more hands-on approach.

ADVANCED ROADMAPS (FORMERLY PORTFOLIO FOR JIRA SERVER)

This course is ideal for new users of Jira Portfolio, especially for those requiring the ability to plan the delivery of software projects run by Agile teams.

JIRA SERVICE MANAGEMENT ESSENTIALS (AVAILABLE FOR SERVER AND CLOUD)

This course covers Atlassian Jira concepts and will equip you with everything you need to raise service requests while using Jira to manage Service Desk queues, SLAs and customer satisfaction.

JIRA SOFTWARE ADMINISTRATION (AVAILABLE FOR SERVER AND CLOUD)

This course is ideal for new Jira Administrators who have the responsibility of defining projects and configurations for use amongst Agile teams.

JIRA PROJECT ADMINISTRATION (SERVER)

Based on the Atlassian certification ACP-600, by the end of this course, attendees will have a solid understanding of both the configurations in their control and the ramifications of requesting changes from an application administrator. Attendees will also learn the best practices of shared schemes, permissions and project configurations.

All of our training courses are customisable, allowing you to pick and choose modules from other courses which can be tailored and developed in a way that suits your specific needs.

For a real-life example of our Jira training, read our [case study on how we helped the team at Vodafone](#) improve their collaboration efforts with Jira.

For more information, please visit: www.clearvision-cm.com/.

