

# How To Use Jira



# WHAT IS JIRA?

Jira is a suite of agile work management solutions that powers collaboration across all teams from concept to customer, empowering you to do the best work of your life, together. Jira offers several products and deployment options that are purpose-built for Software, IT, Business, Ops teams, and more. Read on to see which is right for you.

## About the Jira family

Jira helps teams plan, assign, track, report, and manage work and brings teams together for everything from agile software development and customer support to start-ups and enterprises.

Software teams build better with Jira Software, the #1 tool for agile teams. Deliver amazing service experiences across all teams from IT, Dev, Ops, and more with Jira Service Management. Business teams can unlock the power of agile and collaborate better with Jira Work Management. Jira Align is an enterprise agile planning platform that connects work at scale.

With templates and solutions crafted for every team and Jira as your common language – work moves fluently and transparently across your organization.

## JIRA SOFTWARE

### Users

- Software developers
- QA and testing
- Project managers
- Program managers
- Product designer
- Product owners
- Scrum masters

## Use cases

- [Agile teams](#)
- [Bug tracking](#)
- [Project management](#)
- [Product management](#)
- [Process management](#)
- [Task management](#)
- [Software development](#)
- [Requirements & test case management](#)

## Hosting

- Cloud, Data Center

## Licensing

- Licensed by user
- All Jira Software users can access Jira Work Management features
- Users have access to
  - Software projects & features
  - Business projects & features

[Learn more about Jira Software pricing.](#)

## Important integrations for Jira Software

[Confluence](#), [Bitbucket](#), [Trello](#), [Slack](#), [GitHub](#), [Microsoft](#), [Google](#)  
[Learn more](#)

# JIRA SERVICE MANAGEMENT

## Users

- DevOps managers
- IT operations managers
- Support managers
- IT Service desk agents
- Enterprise architect
- Services owner

## Use cases

- ITSM
- Service Desk
- Enterprise Service Management
- Service Request Management
- Incident Management
- Problem Management
- Change Management
- Asset Management
- Customer Support
- Ticketing Support

## Hosting

- Cloud, Data Center

## Licensing

- Licensed by agent
- Free and unlimited customers (users submitting requests)
- All Jira Service Management agents can access Jira Work Management features
- Users have access to
  - Service management projects & features
  - Software projects & features
  - Business projects & features

# Important integrations for Jira Work Management

## Confluence

## Jira Align

### Users

- [Portfolio managers](#)
- [Executives](#)
- [Program managers](#)
- [Release train engineers](#) [Product managers](#)
- [Product delivery teams](#)
- [Transformation teams](#)
- [Finance](#)

### Use cases

- Enterprise agile transformation
- Scaling agile
- [Spotify](#)
- [SAFe](#)
- [Scrum@Scale](#)
- [LeSS](#)
- [Disciplined agile](#)
- [Hybrid](#)

### Hosting

- Cloud, Dedicated Cloud

### Licensing

- A Jira Align Standard user has access to all functionality for collaborative planning, management execution, and analysis/reporting/visualization across Program and/or Team modules.
- A Jira AI
- Jira Align Enterprise user has access to all functionality of a Standard user plus access to Enterprise, Portfolio, and Solution modules.

# Important integrations for Jira Align

Jira Software (Premium), Trello, Azure DevOps, Tasktop

## Jira Software hosting options

### Cloud

With Jira Software Cloud, we host and set up your Jira Software site in the cloud for you. This is generally the best option for teams who want to get started quickly and easily, and for teams who don't want to manage the technical complexity of hosting themselves. [Learn more](#)

### Data Center

With Jira Software Data Center, you can host Jira Software on your own hardware or with IaaS vendors like AWS and Azure. This is generally the best option for enterprise teams who need uninterrupted access to Jira Software and performance at scale. [Learn more](#)

## Key terms to know

### Issues

A Jira 'issue' refers to a single work item of any type or size that is tracked from creation to completion. For example, an issue could be a feature being developed by a software team, a to-do item for a marketing team, or a contract that needs to be written by a legal team.

Tip: Other commonly used terms for issues are 'requests', 'tickets' or 'tasks'. We recommend using 'issues' to help your team stay on the same page when working across the Jira product family.

### Projects

A project is, quite simply, a collection of issues that are held in common by purpose or context. Issues grouped into projects can be configured in a variety of ways, ranging from visibility restrictions to available workflows.

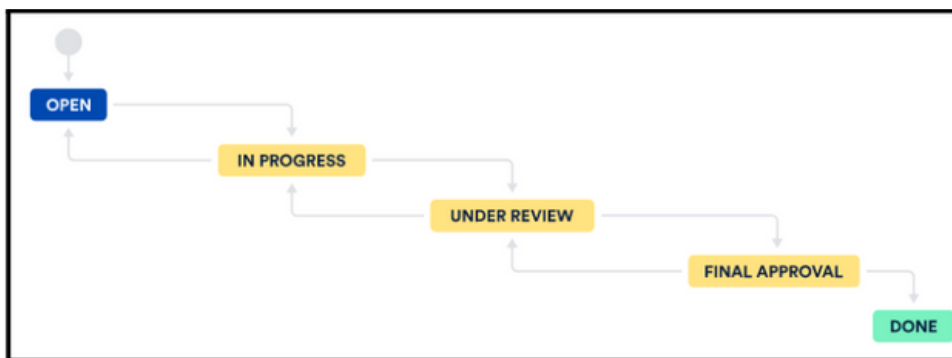
Jira Software projects are flexible working spaces that allow you to group issues by team, business unit, product, or stream of work. Projects don't need to be tied to the same delivery date. For example, if you group your issues by team, you could have a marketing project, a development project, and a legal project, all of which would track the ongoing work of those particular teams. Every issue would be represented by an issue key (specific to a project) and an issue number, i.e. MKT-13, DEV-4, LEG-1.

## Boards

A board in Jira software is a part of a project that displays issues giving teams a flexible way to view, manage, and report on work in progress. Simply put, a board is a visual representation of a team's workflow within a project.

## Workflows

Workflows represent the sequential path an issue takes from creation to completion. A basic workflow might look something like this:



## Agile

Agile is not a Jira Software-specific term. It's a work philosophy that originated in the software development field and has since expanded to a variety of other industries. While we won't belabor the definition here (there are great agile resources for that!), agile emphasizes an iterative approach to work informed by customer feedback where delivery occurs incrementally and continuously. The ideal agile team can move quickly and adapt to changing requirements without missing much of a beat.

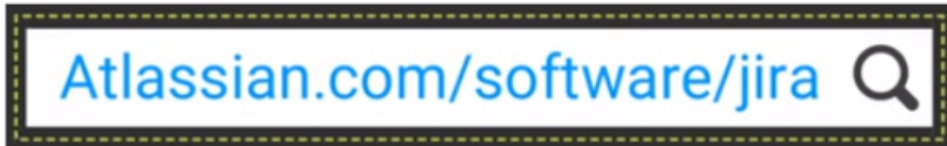
So why are we bringing up agile here? Because Jira Software has major feature sets designed particularly for agile, including scrum or kanban. So, when you see terms like boards, estimation, or cards, it's time to start thinking about how agile fits into your work practice.

It's important to note that because agile is a philosophy and a culture of work, simply using Jira Software won't make your team truly agile. That said, it is a tool built to help your team get there.

Jira software helps agile teams do what they do even better. Head over to agile best practices for Jira to learn more. [Go to the guide](#)

## Getting started with Jira tutorial: 6 basic steps

Before you begin this tutorial, [sign up for](#) Jira Software for free. This guide will help you set up your first project, so keep this tab open while you sign up. Go on, we'll wait here or



### Step 1 – Create a project

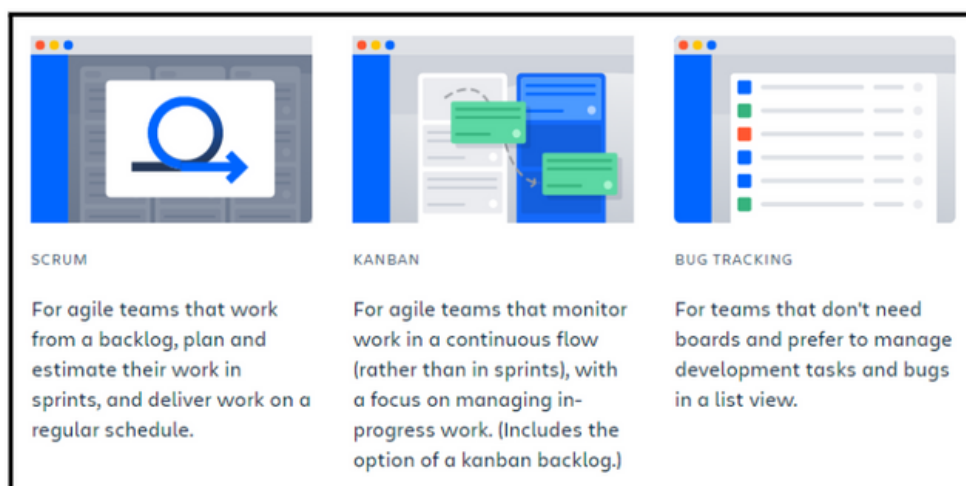
1. In the top-left corner, click the Jira home icon



2. In the top-right corner, select Create project.

### Step 2 – Pick a template

The Jira template library houses dozens of templates across a variety of different categories, and is designed to get your team started quickly and successfully. You can choose a template from all the Jira products you own (Jira Software, Jira Service Management, and Jira Work Management). Today, Jira Software offers three templates:





## Project Types

For the scrum and kanban templates only, you will also be prompted to choose a project type.

- Team-managed projects are suited for independent teams who want to control their own working processes and practices in a self-contained space.
- Company-managed projects are set up and maintained by Jira admins. This project type is designed for teams who want to standardize a way of working across many teams, such as sharing a workflow.

The fundamental difference between the two project types is how they are administered, and whether that occurs at the team level or at a company/Jira admin level. Looking for more information about how company-managed and team-managed projects? [Learn more here](#)

### Step 3 – Set up your columns

A board can display issues from one or more projects and visually represent a team's workflow. Boards provide flexible viewing to help manage issues and report on work in progress. How you set up the columns on your board in the scrum and kanban templates depends if you're in a team-managed (directly from the board) or company-managed project (in board settings).

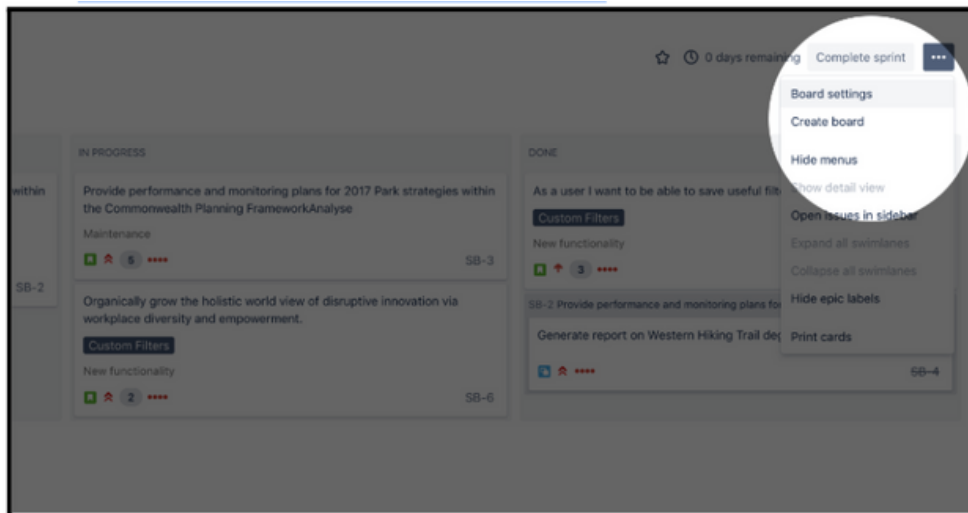


Although there are many things you can configure on your board, we suggest just setting up columns for now. When you're getting started on a new Jira Software project, it's important to make your board reflect the way your team works.

If you're not sure what your team's workflow is or should be, [here is a resource](#) to help you get started.

To set up board columns:

1. Navigate to your team's board by selecting Active sprints (for Scrum projects) or Kanban board (for Kanban projects) in the project menu on the left.
2. Select more (•••) > Board settings in the top-right corner.



3. Select Columns

4. Select Add column to add a column for each step in your team's process.

For example, if work needs to pass through a QA step before it's considered to be complete, you could add a column called "QA" and put it before Done.

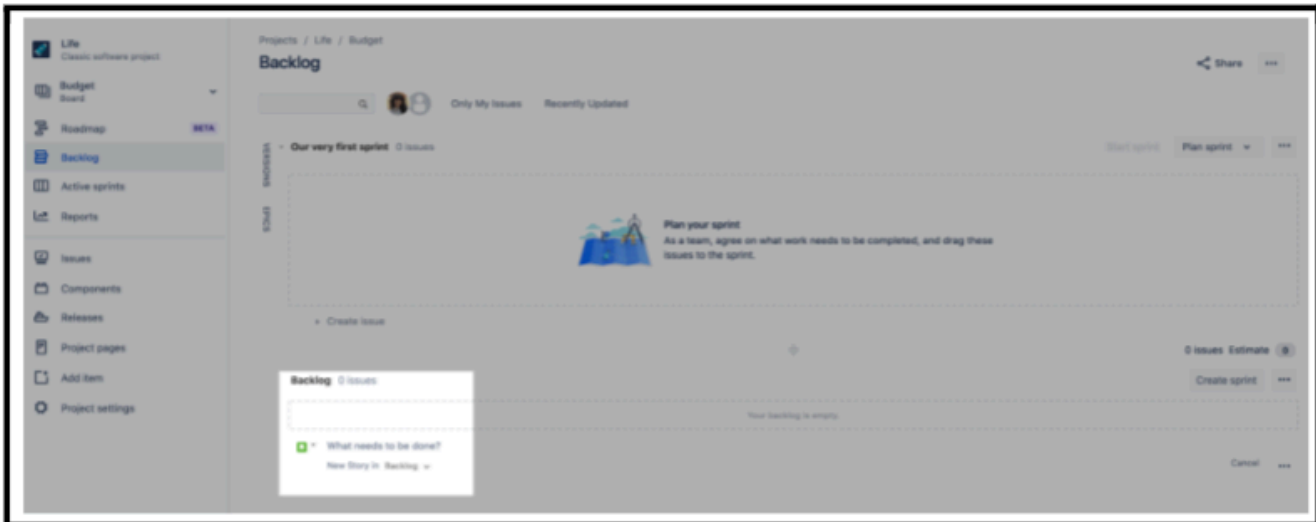
## Step 4 – Create an issue

Issues are the building blocks of your Jira Software project. An issue can represent a story, epic, bug, feature to be built, or any other task in your project.

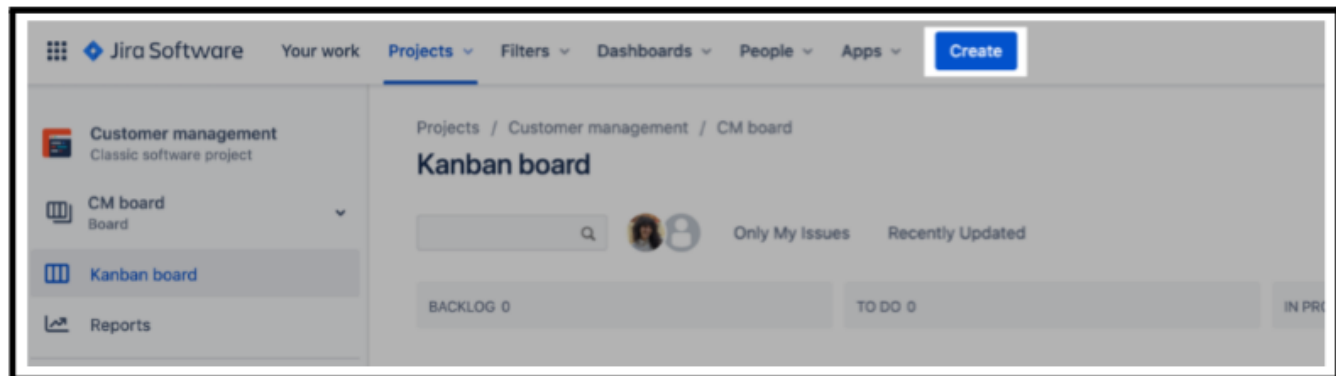


Scrum and kanban are two frameworks for agile project management. In Jira Software, [scrum vs. kanban](#) projects have different features to help teams that are using either framework.

For Scrum teams: Select Backlog in the project menu on the left and then hit + Create issue to start adding work to your team's backlog.

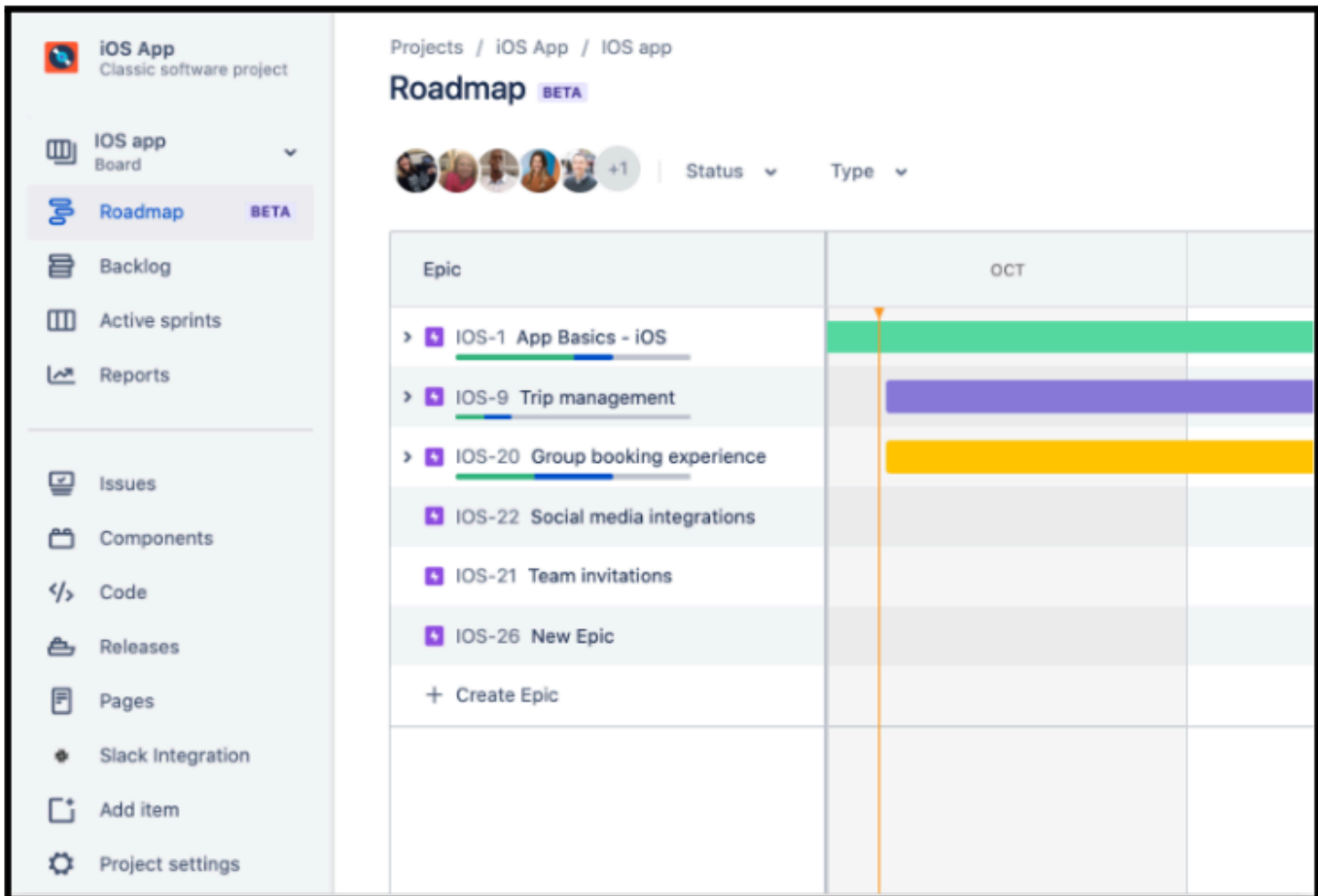


For Kanban teams: Navigate to your Kanban board and select Create in the global menu. Your issue will appear in the Backlog column.



Both Scrum teams and Kanban teams can add large pieces of work on their Roadmap. The Roadmap is a place to visualize, plan, and manage work. [Learn more about managing work on the roadmap.](#)

1. In the project menu, select Roadmap.
2. Start typing, then hit enter to create your first epic.



You can then add smaller pieces of work to the issue. Hover over the epic. Click + Add a child issue.

You can configure issues in lots of different ways. [Learn more about creating and configuring issues.](#)

## Step 5 – Invite your team

It's time to get the party started! Once you have enough work represented on your board, start inviting team members. To get your team involved, start by adding each team member to your Jira site:



1. In the project menu on the left, select Project settings.
2. Select People.
3. In the top-right corner, select Add people.
4. Search for your team member's email address, and select Add.

## Step 6 – Move work forward

It's time to get the party started! Once you have enough work represented on your board, start inviting team members. To get your team involved, start by adding each team member to your Jira site:

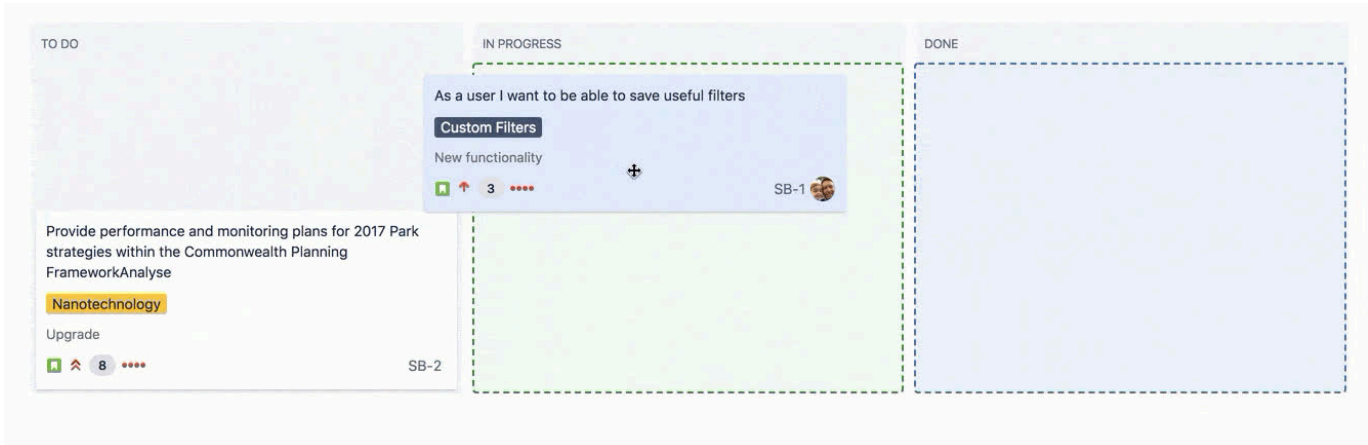
Now that your team is on your Jira site, you're ready to collaborate and track work together. If you're in a scrum project, you'll need to create and start a sprint to begin tracking work. If you're in a kanban project, you can start tracking work on the board. To track work items, move an issue from one column to another as it progresses through your team's workflow.

Pro-tip: Stay connected, and move work forward – anywhere, anytime in the palm of your hand with the Jira Cloud app for iOS or Android.

[Learn more](#)



Make sure to leave comments on issues so that everyone on the team can follow what's going on; this creates an open way of working, instead of restricting communicating between two people via private emails.



**Here are some links that provide clear tutorials about how to set up a JIRA account.**

BEST PRACTICES FOR JIRA –

<https://www.atlassian.com/software/jira/guides/getting-started/best-practices>

YOUTUBE BEST TUTORIAL LINK FOR DASHBOARD REVIEW –

<https://youtu.be/GWxMTvRGlpc>

PRICING – <https://www.atlassian.com/software/jira/pricing>

FEATURES – <https://www.atlassian.com/software/jira/features>



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