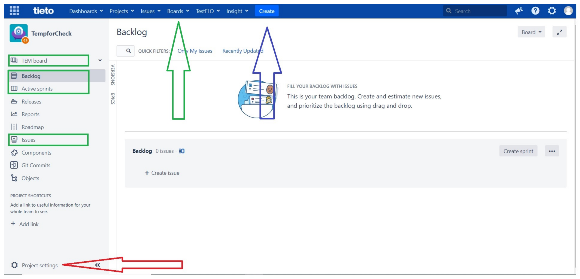
Jira Project Admin guide for beginners



The requirement to be done: The Jira project is created in TDS Portal as SaaS Service.

Congratulation - you are now Jira project admin. And because you are not experienced with Jira, you are here on this page. **Don't be afraid** of playing with your projects - you cannot damage other's work (Jira ask you if you really want to delete something) specially if the project is still empty, and we fix it anyway.

Read the manual to the end. In case of any question, please contact TDS Support - we are here for you!

As project administrator, you have access to the **Project administration page**. As admin:

- You can set **Components, Versions and Roles**
- You have to know how **Permissions** and **Issue security** works
- You have to know how **Issue types** affect workflow and screen setting
- If your project doesn't share schemes with other projects, you can partially set **workflows and screens**
- The rest in list is not important now and/or can be set by Jira admins (TDS team).

Project board is the place where you will work at most.

- Any user can create a board, not only projects admins
- You can create a board in top menu Boards View all boards Create board

But now, **create a first issue.**

If you go through this page you will be able to manage your project. For further studies visit **Official Documentation** or ask directly TDS Team.

Project settings

It is place where you configurate your project. Go to your project and click **Project settings** in main Menu (in the left bottom corner)

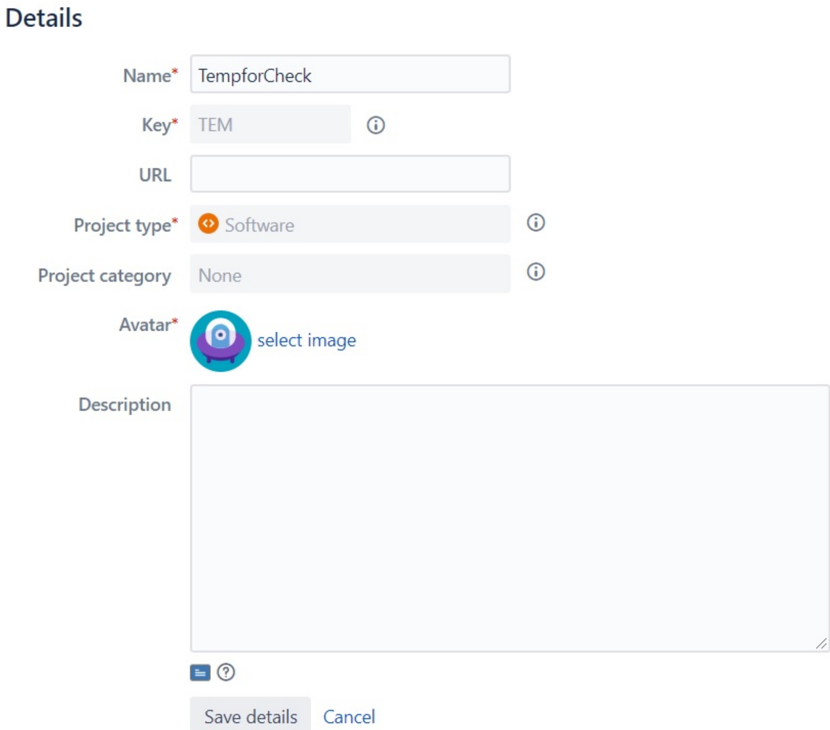
Details

Here are the basic information of projects, names generally.

- **Name** - Human readable name of the project. Can be changed.

- **Key** - unique identificator of the project. When we are asking for project, give us the key or link directly. Can be **changed** and even existing links are not lost

If you need to change the project key , please contact TDS Support - we are here for you!



Issue types

You can have different types of things by using different *issue types*. Also, you can configure each issue type to act differently, e.g. to follow a different process flow or track different pieces of information.

- As the default you get the issue schema according to project type selection (you select it in TDS Portal during Jira project creation).
- The project type selection you can check here.
- There are many Issutypes like Bug, Task, New Feature, Change, Request, … Important is not the name, but the way you work with that (defined by workflows and screens)

To add or edit the issue types , please contact TDS Support - we are here for you!

The issue type scheme defines which issue types apply to this project. To change the issue types used, you can select a different issue type scheme, or modify the current scheme.

Learn more about Issue Types

Scheme used by this project: TEM: Scrum Issue Type Scheme

Issue Type	Description	Workflow	Field configuration	Screen
Story	Created by Jira Software - do not edit or delete. Issue type for a user story.	Software Simplified Workflow for Project TEM	Default Field Configuration	TEM: Scrum Default Issue Screen
Bug	A problem which impairs or prevents the functions of the product.	Software Simplified Workflow for Project TEM	Default Field Configuration	TEM: Scrum Bug Screen
Epic	Created by Jira Software - do not edit or delete. Issue type for a big user story that needs to be broken down.	Software Simplified Workflow for Project TEM	Default Field Configuration	TEM: Scrum Default Issue Screen
Task	A task that needs to be done.	Software Simplified Workflow for Project TEM	Default Field Configuration	TEM: Scrum Default Issue Screen
Sub-Task SUB-TASK	The sub-task of the issue	Software Simplified Workflow for Project TEM	Default Field Configuration	TEM: Scrum Default Issue Screen

A *workflow* describe the process of your work that an issue will follow, e.g. Open, In Progress, Resolved. You can configure how issues will transition between statuses, e.g. who can transition them, under what conditions, and which screen will be displayed for each transition.

- The workflow needs to be understood by project users. It is good to keep it **as simple as possible.**
- Each issuetype can have own workflow and also each project can have own set of workflows. But workflows schemes can be **shared** across the projects.

To use other workflow than the default , please contact TDS Support - we are here for you! They can add any statuses you want and they can add post functions - automation rules executing during the transition (auto-assigment, clearing of field) or validators - checking values of issues during transitions (mandatory fields, user rights).

Workflows

Add Workflow | Switch Scheme

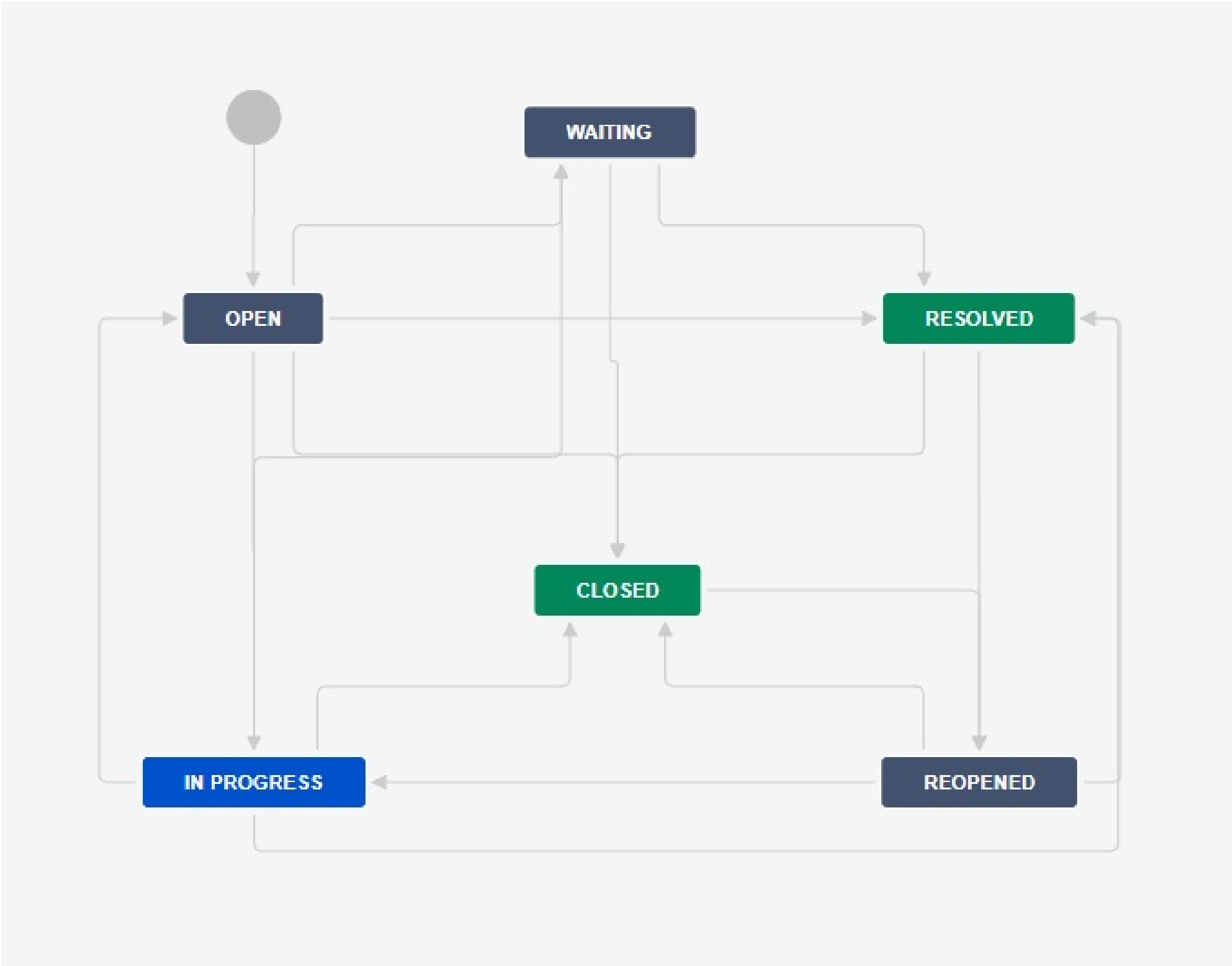
A workflow defines which statuses and transitions an issue type can use within a project.

The workflow scheme defines which workflow applies to to each issue type in this project. To change the workflow scheme used, you can select a different workflow scheme, or modify the current scheme.

Learn more about Workflows

Scheme used by this project: TEM: Software Simplified Workflow Scheme

Workflow	Issue Types	Actions
Software Simplified Workflow for Project TEM (View as text)	Story Bug Epic Task Sub-Task	

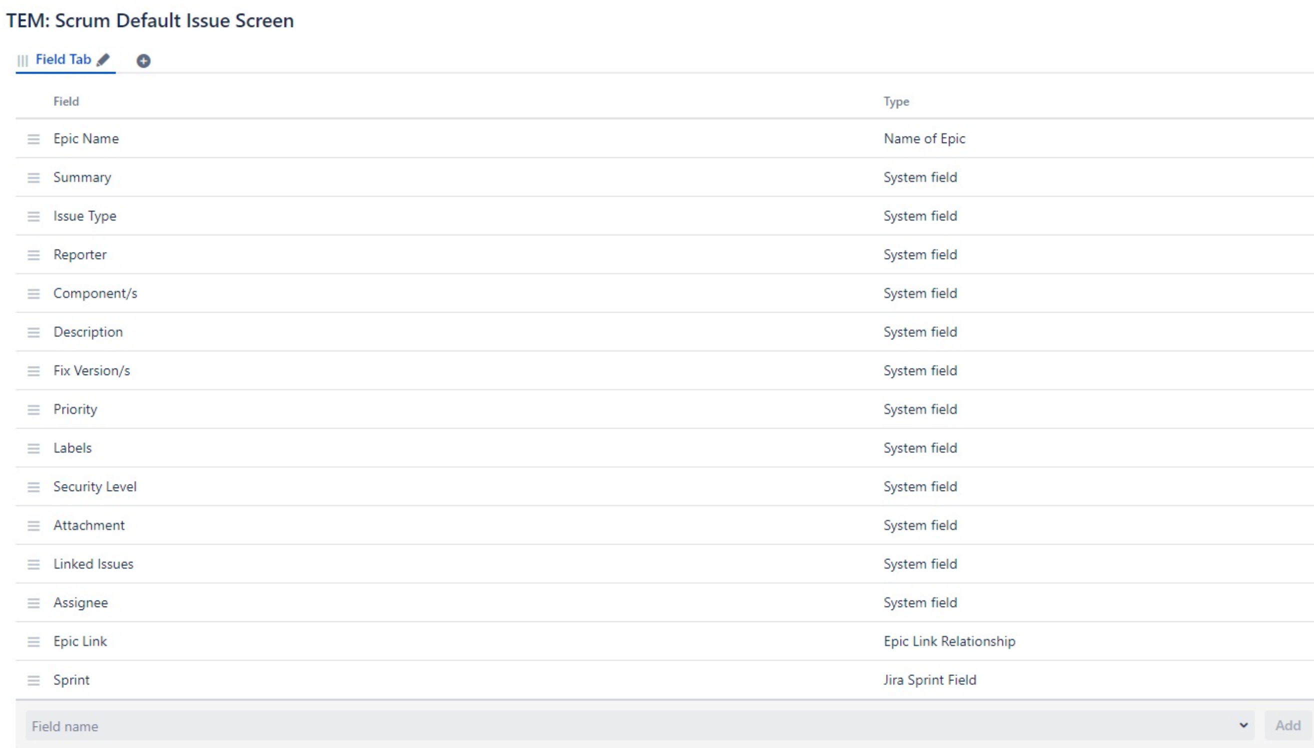


comment
to much info- rather to split info about Screens and Fields

Screens are the list of fields which are used on you issues.

- Each **issuetyp**e can have **own screens** and also each project can have own set of screens. But screen schemes can be **shared** across the projects.
- By default your project has the same Create, Edit and View screens.
- **Fields** can be **separated into tabs** within the screen. Very useful for huge amount of fields.
- Be careful with adding some field to the screen: wait for a while and think - **how will be the field used**? For example we will introduce a new field "Reopen" where we note if the issue was reopened. Users will mark issues as reopen, project owner will make analysis of reopen fields and also some action need to be done to reduce of reopened fields. If any of this this steps is missing, the field is useless.

To create a new field or update screen, please contact TDS Support - we are here for you!



TEM: Scrum Default Issue Screen

Field Tab

Field	Type
Epic Name	Name of Epic
Summary	System field
Issue Type	System field
Reporter	System field
Component/s	System field
Description	System field
Fix Version/s	System field
Priority	System field
Labels	System field
Security Level	System field
Attachment	System field
Linked Issues	System field
Assignee	System field
Epic Link	Epic Link Relationship
Sprint	Jira Sprint Field

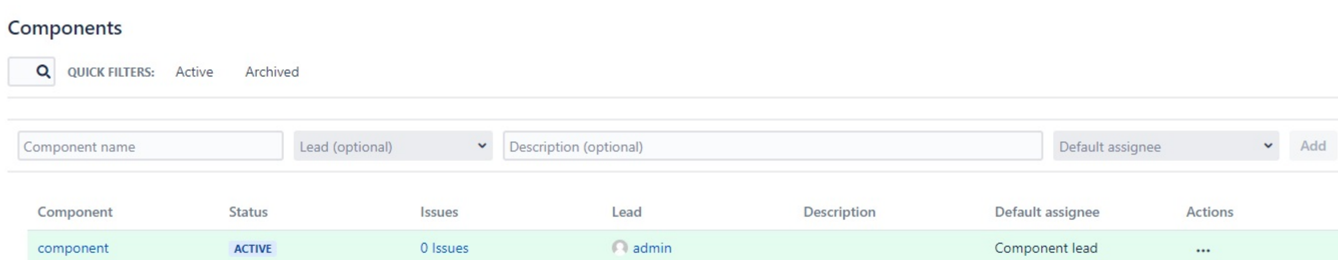
Field name Add

Issues can be group in system field Versions

- In Jira issue, you can find versions as **Affected version** (where you find the bug) and **Fix Version** (where you fix the bug)
- You can mark versions as released

Components allows you to **categorize** issue within the project.

- Project admin can define the new components.
- Components can be set with **default assignee** - which can speed up ticket resolution



Components

QUICK FILTERS: Active Archived

Component name | Lead (optional) | Description (optional) | Default assignee | Add

Component	Status	Issues	Lead	Description	Default assignee	Actions
component	ACTIVE	0 Issues	admin		Component lead	...

Users and Roles

Don't manage users it here! User management is solved via TDS Portal. In most cases, **you shouldn't edit** this page at all. Look here for help.

Your project has available roles: reader, user and admin.

> **To create an extra group, please contact TDS Support - we are here for you!**

Permissions

In permission section you can see how your project rights actually work.

> **To any changes in permission scheme, please contact TDS Support - we are here for you!**

Issue permissions

Permission	Granted to
Assignable User Users with this permission may be assigned to issues.	**Project role** • Administrators • Developers
Assign Issues Ability to assign issues to other people.	**Project role** • Administrators • Developers
Close Issues Ability to close issues. Often useful where your developers resolve issues, and a QA department closes them.	**Project role** • Administrators • Developers
Create Issues Ability to create issues.	**Project role** • Administrators • Developers
Delete Issues Ability to delete issues.	**Project role** • Administrators
Edit Issues Ability to edit issues.	**Project role** • Administrators • Developers
Link Issues Ability to link issues together and create linked issues. Only useful if issue linking is turned on.	**Project role** • Administrators • Developers
Modify Reporter Ability to modify the reporter when creating or editing an issue.	**Project role** • Administrators

This is advanced, additional setting. Don't look here until you understand the basics

Fields

In fields section can be set if the fields are mandatory or hidden (this can be done in workflows and screens)

> **TO any changes in fields, please contact TDS Support - we are here for you!**

Security levels

In the section you can extend permission (another level of security) like hiding particular issues.

- Example: Your customers can see all issues but no your internal bugs.
- There is no default, all project security schemes are handled separately.

> **To add security scheme, please contact TDS Support - we are here for you!**

Notifications

- User can be notified when a particular action occurs - an event (issues commented, created, edited) can be defined who (reporter, assignee, particular user, group) will receive the email.
- Jira can spam a lot, so we keep notification schemes simple as possible.

> **To do changes in notification area, please contact TDS Support - we are here for you!**

Jira project can be integrated with other application like for example GitLab repositories.

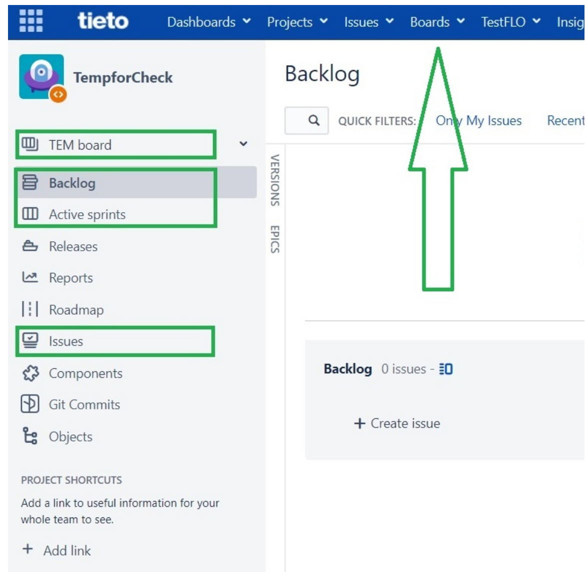
- You can see branches and commits from you issue.
- You can even create branches from the issue.

> **To integrate your project with other application, please contact TDS Support - we are here for you!**

And that is all for project setting. And remember, there is a lot more in **Official Documentation.**

Boards management

Board is a visual representation in project, where you can check your issue with statuses. More information what is a board here.

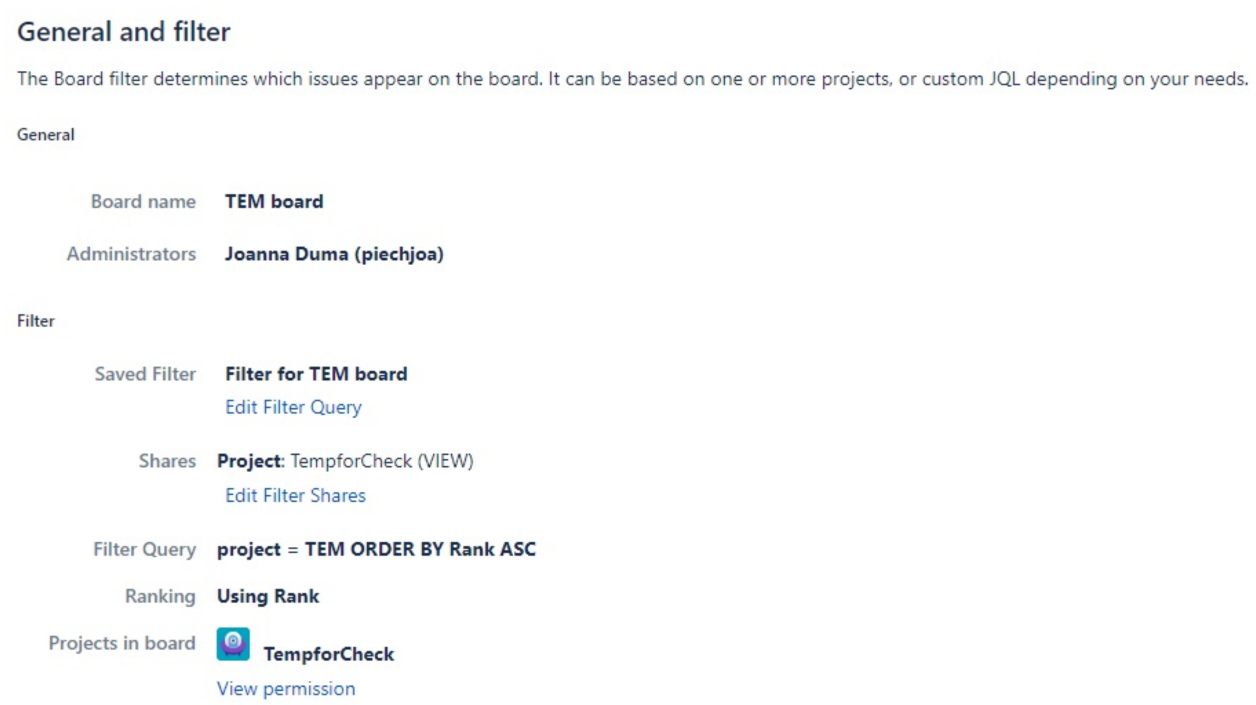


Let's start with the easiest way "Create a new board":

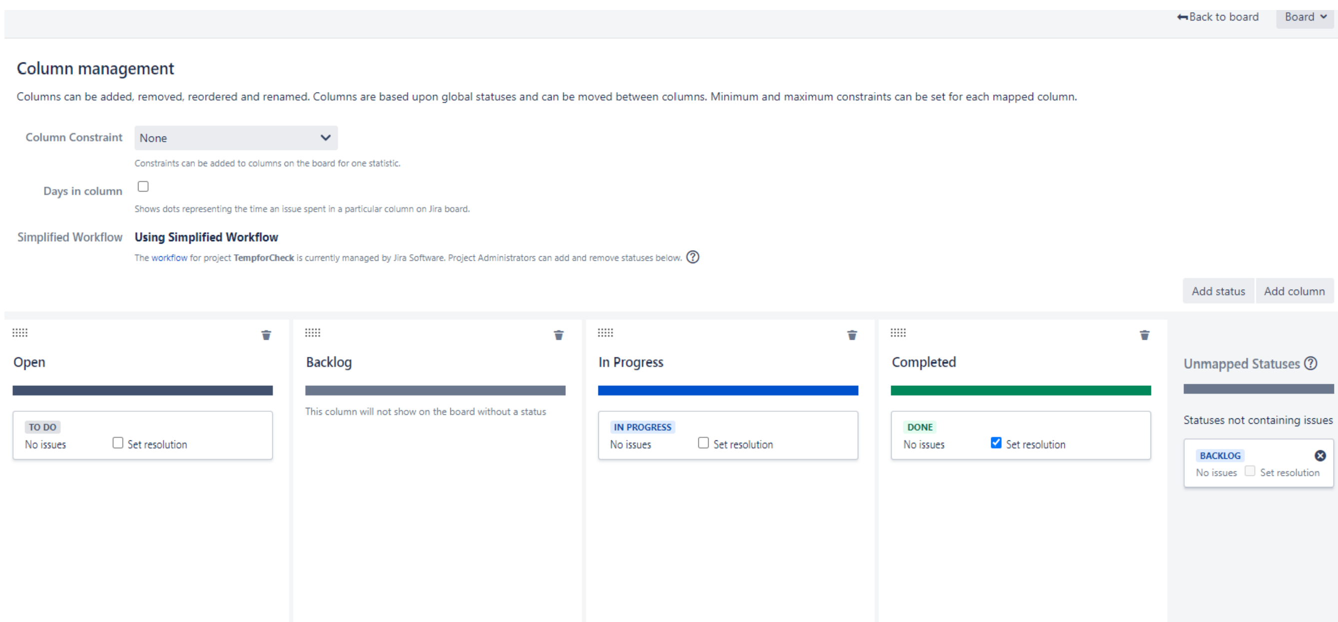
Go to **Board**s (top menu) **View all boards** **Create board** (at the top-right of the page)

- choose between Scrum board and Kanban board
- Go to "To right corner Board" Configure
- **Official Board documentation**

- Name - self-explanatory.
- Administrators - users who can set-up configuration section. Administrators can't change the mail filter.
- **Filter** - the main filter is set during the board creation. It is an eider project board ("project = 'XYZ") or board based on my, existing filter ("project = XYZ and component = this one and label = some"). Only **board owner** can **change the filter**. Jira's admins can change ownership of the filter
- **Sharing** - accessing project and the boards is often the same. But board admin can change it.
- Kanban sub-filter - you can hide here the issues which are already done. Don't change the default unless you know what are you doing.
- If you **miss some issues** on board, check the filters.



- Boards are a different view of the projects. In project workflow you define statuses, but here you can redefine in way which personally suits you the best (As developer you might not be interested in planning, analyzing phase).
- Here you can set columns on which are the workflow statuses mapped.
- You can **map** several **statuses** into one **column**.
- Issues with status, which are not in any column, are not on the board at all.
- If you **miss some issues** on board, check the columns.



- Here, you **horizontally** sort issues on board
- You can make swim lines base on predefined types (assignee, story) or n your own, more complex filters (assignee = 'XYZ' or assignee = 'ABC')

- Reduce number of visible issues on board to see what is really important to you

- Issue visualization by color based on queries, issutypes, stories, ...

- Set up working days of the week and holidays

- If you clock on any issue on board, the detail issue view is shown.
- Here you can configure what is important for you to be visible on board.