

Jira Basics Tutorial



For Canoo Employees

Jira Basics Tutorial

Created for Jira users at Canoo, Inc.

Take the tutorial to learn Jira

To learn how to use Jira, just work through the tutorial in sequence from page 5 to 88.

Use it as an on-the-job help resource

To get a reminder of how to do a specific task, just click on the task below to jump to its instructions:

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BEGIN USING JIRA

In this section, you'll learn how to:

- **Open a Project**
- **View Project Issues**

Callout: What is Jira used for at Canoo?

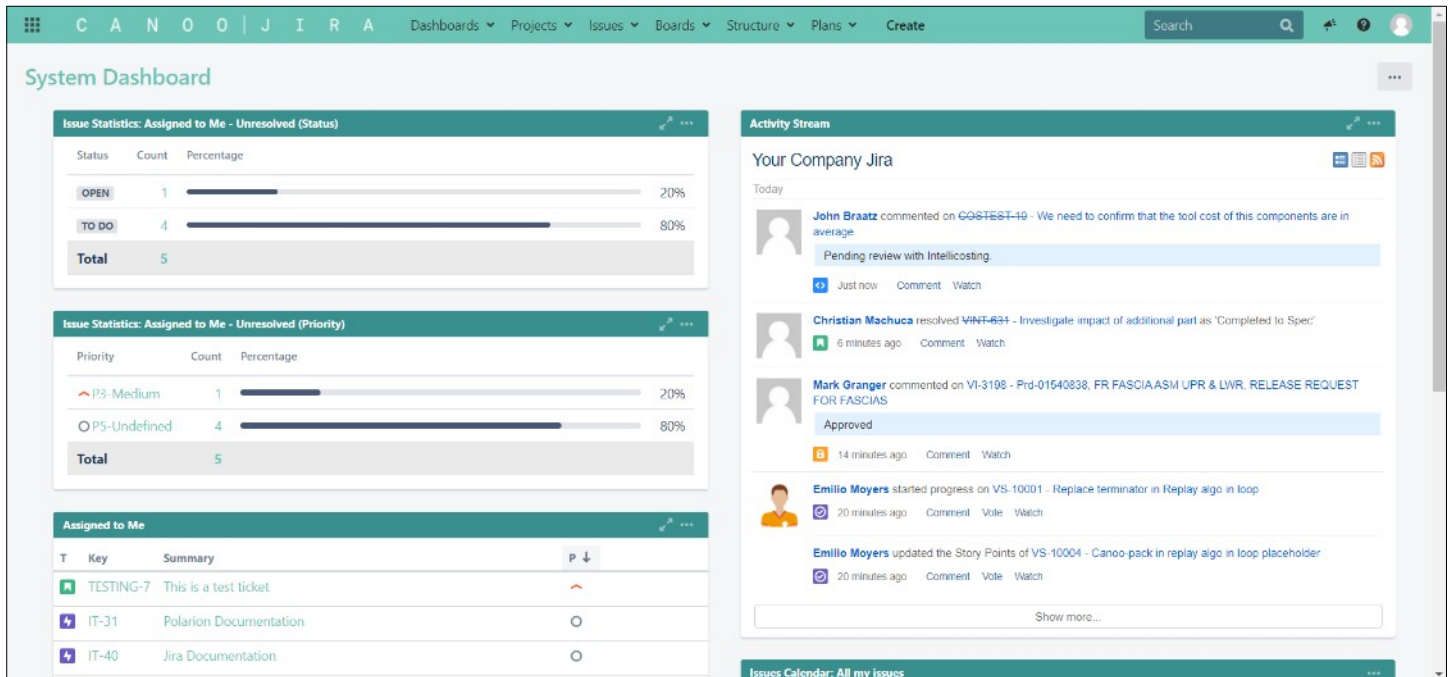
Jira is a project management application that's used to manage all sorts of projects at Canoo, from software development to vehicle hardware engineering.

It's also used at Canoo to manage service desk operations across various departments. For example, it's used by the IT help desk to manage trouble tickets.

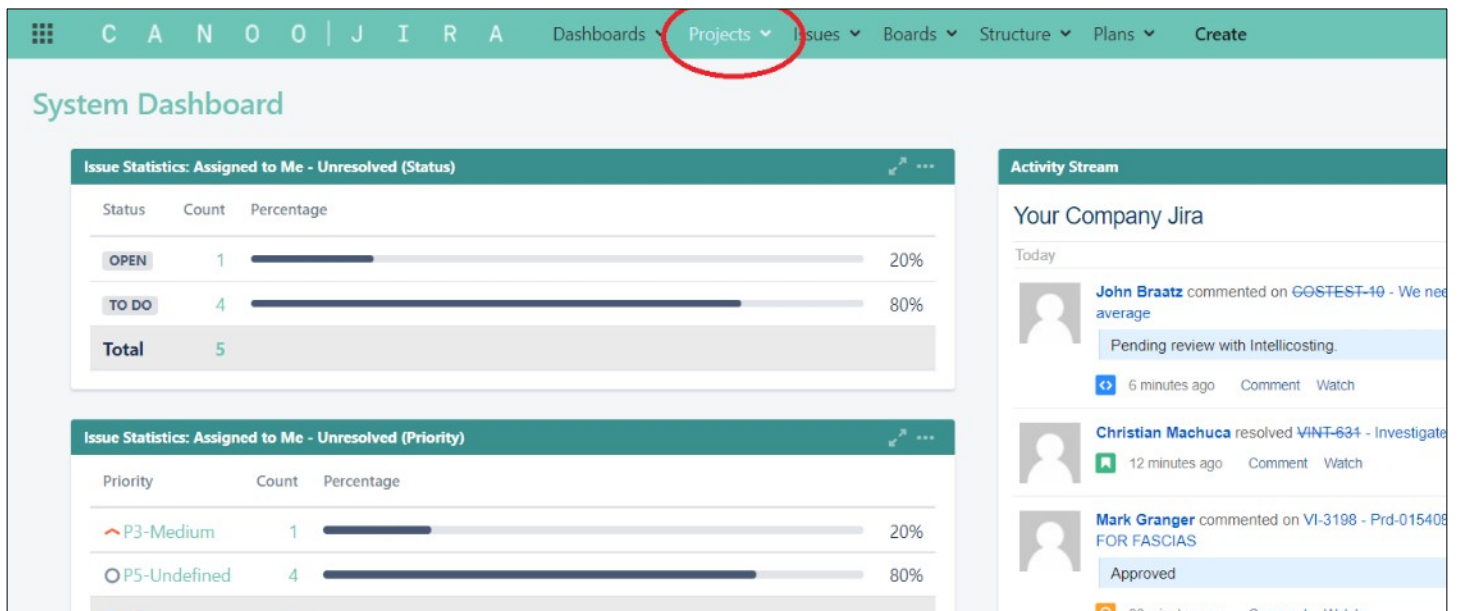
Open a Project

1. Log into Jira.

It should look like this:



2. In the top bar, click **Projects**.



3. When the menu appears, click **View All Projects**.

The screenshot shows the Jira System Dashboard. The top navigation bar includes 'C A N O O | J I R A' and various menu items like 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', 'Plans', and 'Create'. The 'Projects' menu is open, showing a list of project types: 'CURRENT PROJECT' (Sample Testing (TESTING)), 'RECENT PROJECTS' (IT Ops (ITOPS), Helpdesk (HELPDESK), Manufacturing Engineering (MFGENG), Design for Manufacturing (DFM), IT App Development (IT)), and other categories like 'Software', 'Service Desk', and 'Business'. The 'View All Projects' option at the bottom of the menu is circled in red. The background shows the 'System Dashboard' with 'Issue Statistics: Assigned to Me - Unresolved (Status)' and 'Issue Statistics: Assigned to Me - Unresolved (Priority)' tables.

Status	Count	Percentage
OPEN	1	
TO DO	4	
Total	5	

Priority	Count	Percentage
P3-Medium	1	
P5-Undefined	4	80%
Total	5	

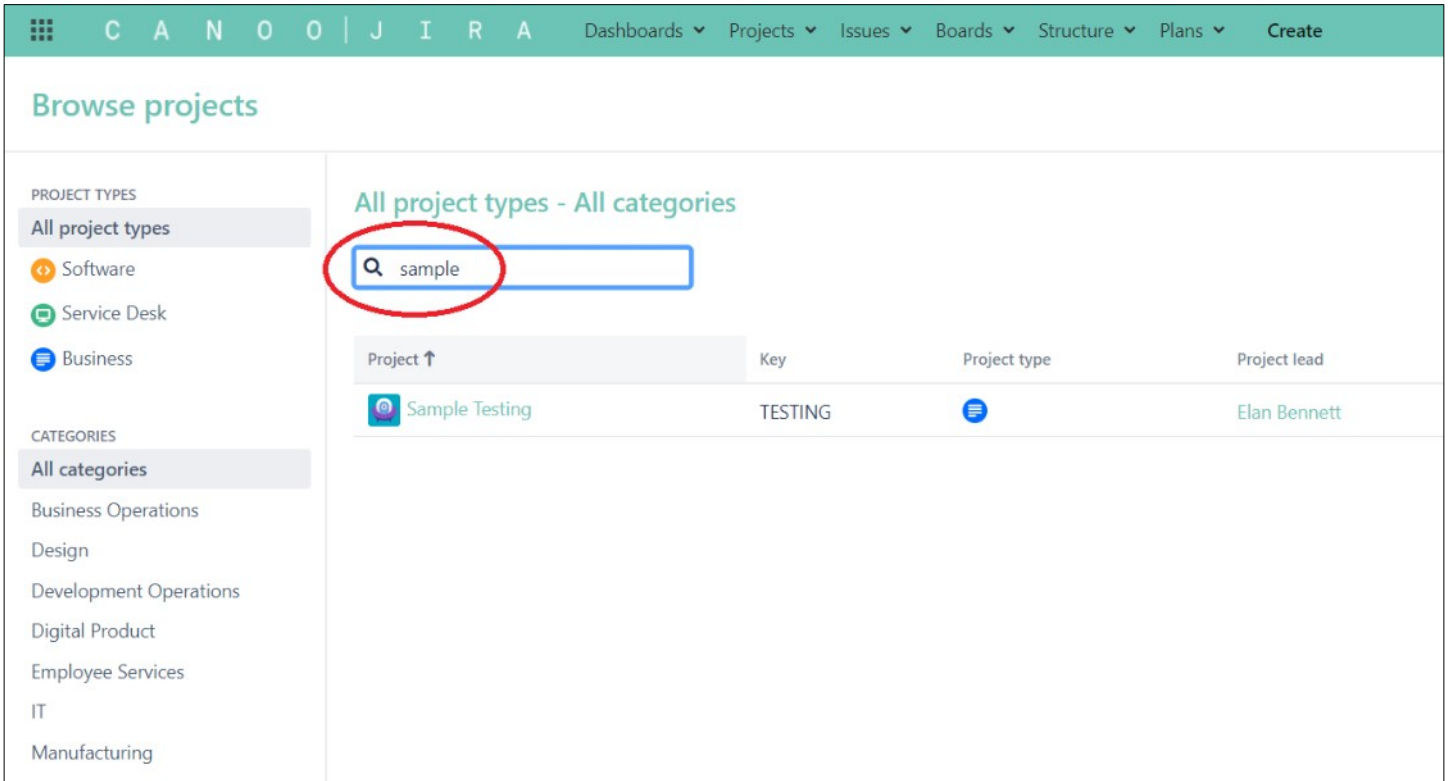
The **Browse Projects** screen should appear.

The screenshot shows the 'Browse projects' screen in Jira. The top navigation bar is the same as in the previous screenshot. The left sidebar has 'PROJECT TYPES' and 'CATEGORIES' sections. The main content area is titled 'All project types - All categories' and features a search bar and a table of project types.



Project ↑	Key	Project type	Project lead	Project category	URL
Accessories	ACCESS		Alastair Calder	Vehicle Interiors/Exteriors	No URL
ADAS	ADAS		David Arlt	Propulsion Engineering	No URL
Aerodynamics	AERO		Graham Doig	Vehicle Architecture & Deve...	No URL
App Support	APPS		Derek Austin	IT	No URL
Art Direction	ART		Paul Kim	Design	No URL
Battery HV	BATTMV		David Tarlau	Propulsion Engineering	No URL
Battery Test	BATTEST		Deb Bourke	No category	No URL
Brakes	BRAKES		Khaja Najmuddin	Vehicle Structures and Chas...	No URL
Closures	CLOSURES		Cian Brogan	Vehicle Structures and Chas...	No URL
Color Material Finish	CMF		Cici Wang	Design	No URL
Concept Design Surface	CDS		Mark Smith	Design	No URL

4. Click in the **Search** box, then type:

sample

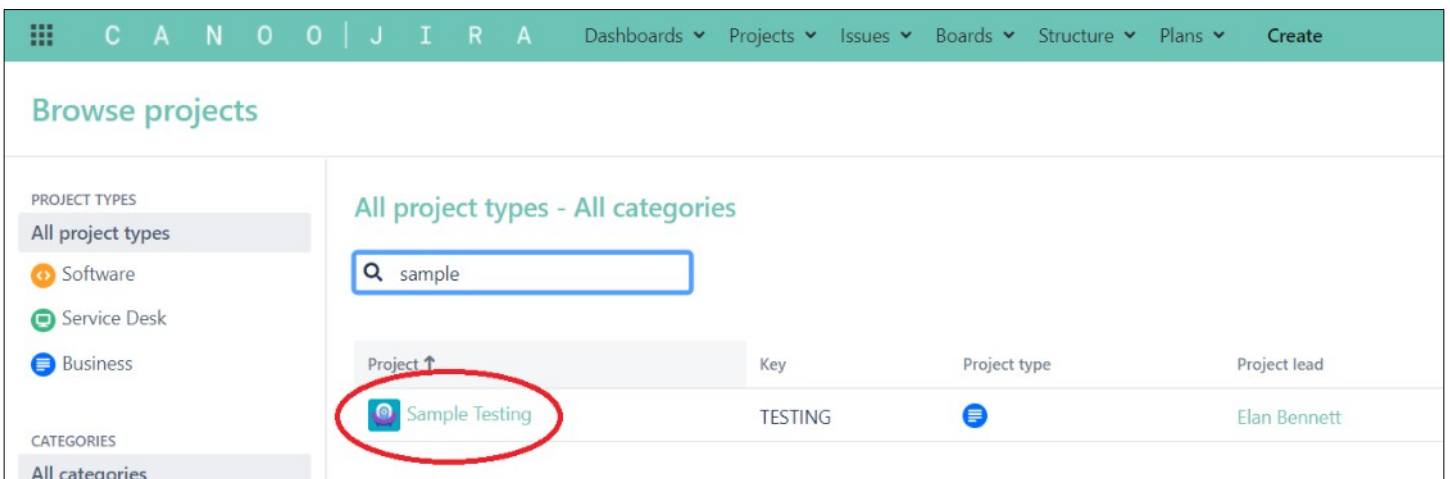


The screenshot shows the Jira 'Browse projects' interface. The top navigation bar includes 'C A N O O | J I R A' and menu items for 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', 'Plans', and 'Create'. The left sidebar contains 'PROJECT TYPES' (All project types, Software, Service Desk, Business) and 'CATEGORIES' (All categories, Business Operations, Design, Development Operations, Digital Product, Employee Services, IT, Manufacturing). The main content area is titled 'All project types - All categories' and features a search box containing 'sample'. Below the search box is a table with the following data:

Project ↑	Key	Project type	Project lead
 Sample Testing	TESTING		Elan Bennett

The **Sample Testing** project should appear.

5. Click the link for the **Sample Testing** project.



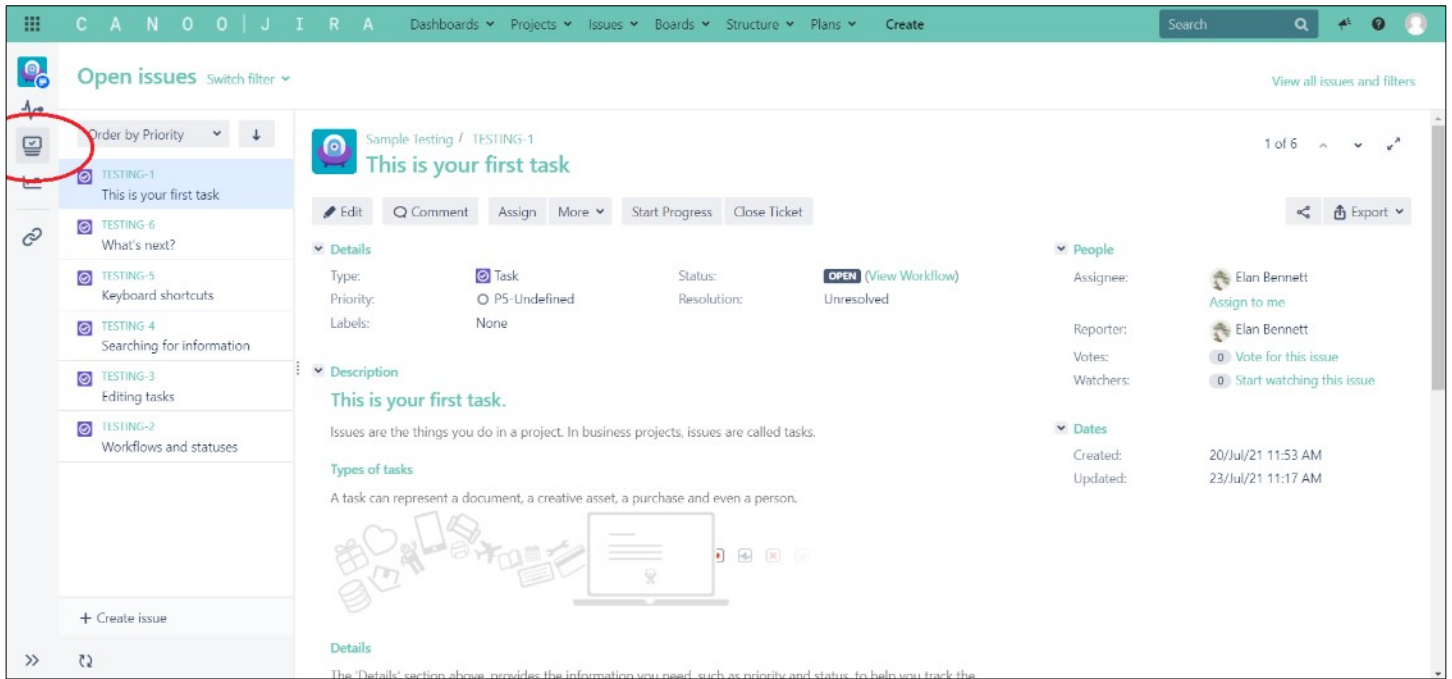
This screenshot is identical to the previous one, but with a red circle highlighting the 'Sample Testing' project entry in the table. The search box still contains 'sample'.

It should open and look like this:

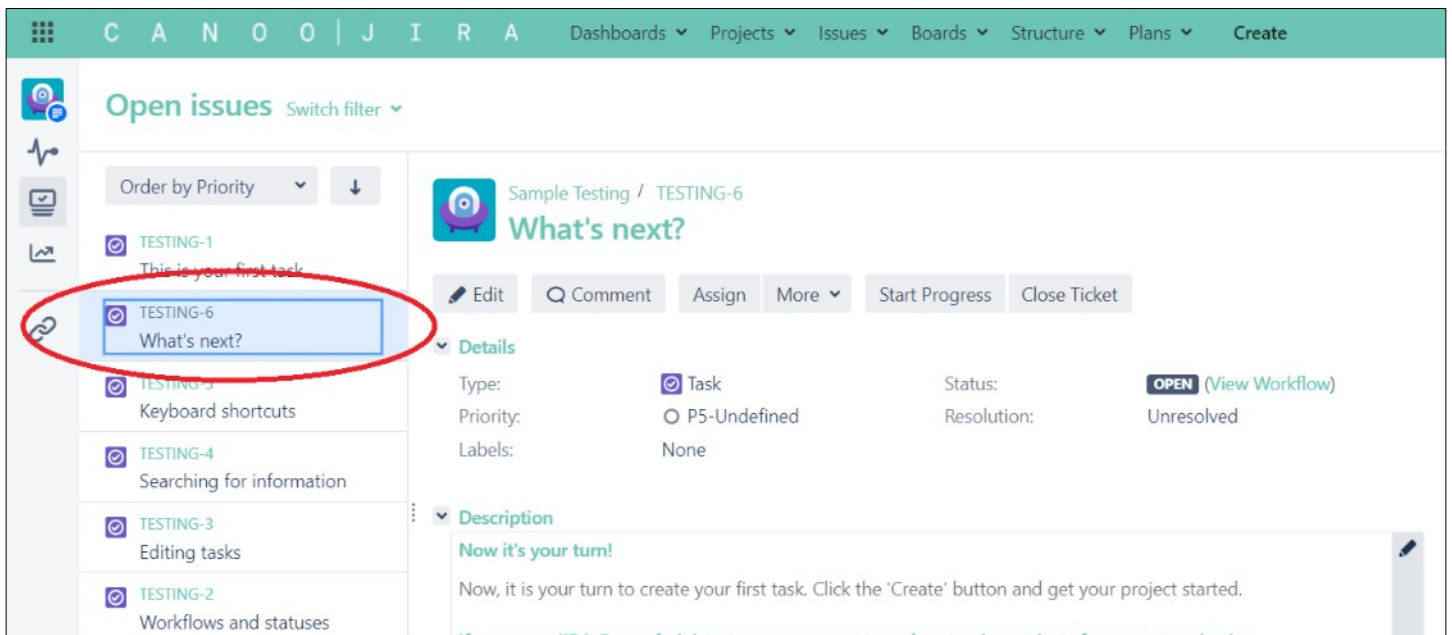
The screenshot shows a JIRA issue page for 'Sample Testing / TESTING-1'. The issue title is 'This is your first task' and its status is 'OPEN (View Workflow)'. The 'Details' section shows the type as 'Task', priority as 'P5-Undefined', and resolution as 'Unresolved'. The 'Description' section contains the text 'This is your first task.' and 'Issues are the things you do in a project. In business projects, issues are called tasks.' Below this is a section titled 'Types of tasks' with a sub-header 'A task can represent a document, a creative asset, a purchase and even a person.' and an illustration of various icons. The 'People' section shows the assignee as 'Elan Bennett' and the reporter as 'Elan Bennett'. The 'Dates' section shows the issue was created on 20/Jul/21 at 11:53 AM and updated on 23/Jul/21 at 11:17 AM. The left sidebar shows a list of issues, with 'TESTING-1 This is your first task' selected. The top navigation bar includes 'C A N O O | J I R A' and various menu items like 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', 'Plans', and 'Create'.

View Project Issues

1. In the sidebar, make sure **Issues** is selected.



2. Click the second issue in the list of issues.



It should open and look like this:

The screenshot displays the JIRA interface for an issue titled "What's next?". The top navigation bar includes "C A N O O | J I R A" and various menu items like "Dashboards", "Projects", "Issues", "Boards", "Structure", "Plans", and "Create". A search bar is visible on the right.

The left sidebar shows a list of issues under the heading "Open issues". The selected issue is "TESTING-6: What's next?". Other issues listed include "TESTING-1: This is your first task", "TESTING-5: Keyboard shortcuts", "TESTING-4: Searching for information", "TESTING-3: Editing tasks", and "TESTING-2: Workflows and statuses".

The main content area for the selected issue shows the following details:

- Project:** Sample Testing / TESTING-6
- Title:** What's next?
- Type:** Task
- Priority:** P5-Undefined
- Status:** OPEN (View Workflow)
- Resolution:** Unresolved
- Labels:** None

The **Description** section contains the following text:

Now it's your turn!
Now, it is your turn to create your first task. Click the 'Create' button and get your project started.

If you are a JIRA Core administrator, you can create and customize projects for your organization.

- Click on 'Create Project' under the Project menu above and select one of the business projects to get started.
- Invite team members to JIRA Core - keyboard shortcut: `Ctrl+P`, then type 'users'
- Delete this Demo Project - keyboard shortcut: `Ctrl+D`, then type 'projects'

Previous: [Keyboard shortcuts](#)

There is a link to "Visit the JIRA Core documentation".

The right sidebar shows the **People** section with the assignee "Elan Bennett" and the option to "Assign to me". It also shows the reporter "Elan Bennett" and options to "Vote for this issue" and "Start watching this issue". The **Dates** section shows the issue was created on 20/Jul/21 at 11:53 AM and updated on 23/Jul/21 at 9:19 AM.

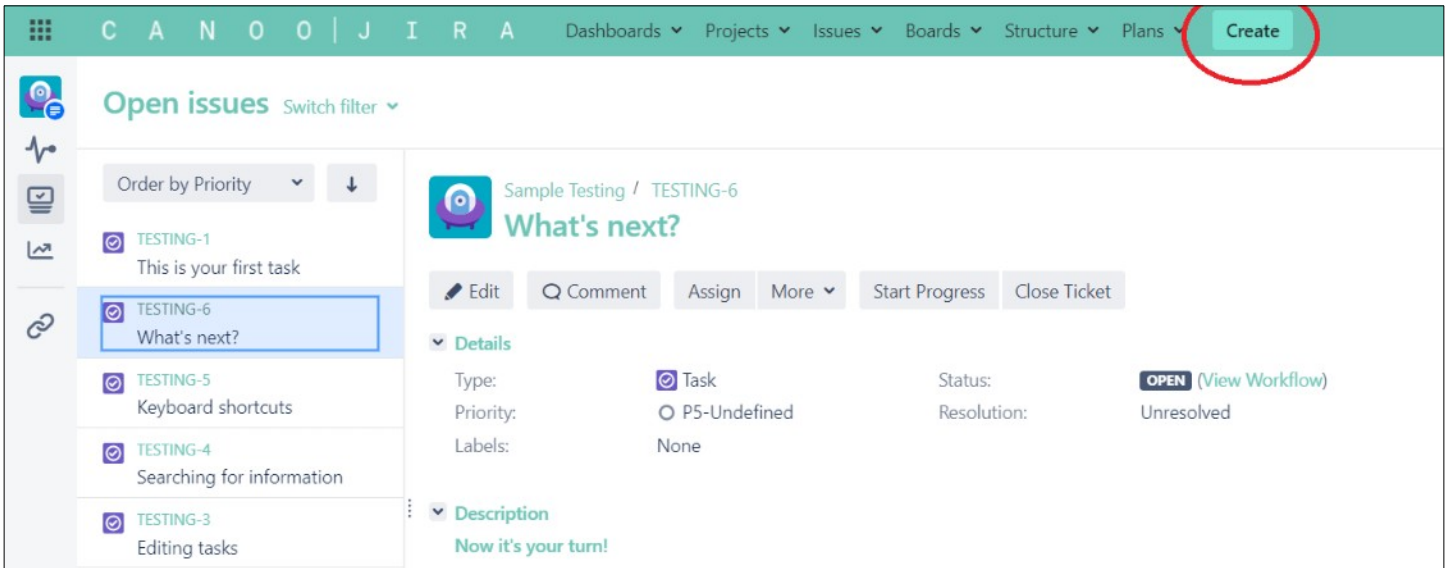
WORK WITH ISSUES

In this section, you'll learn how to:

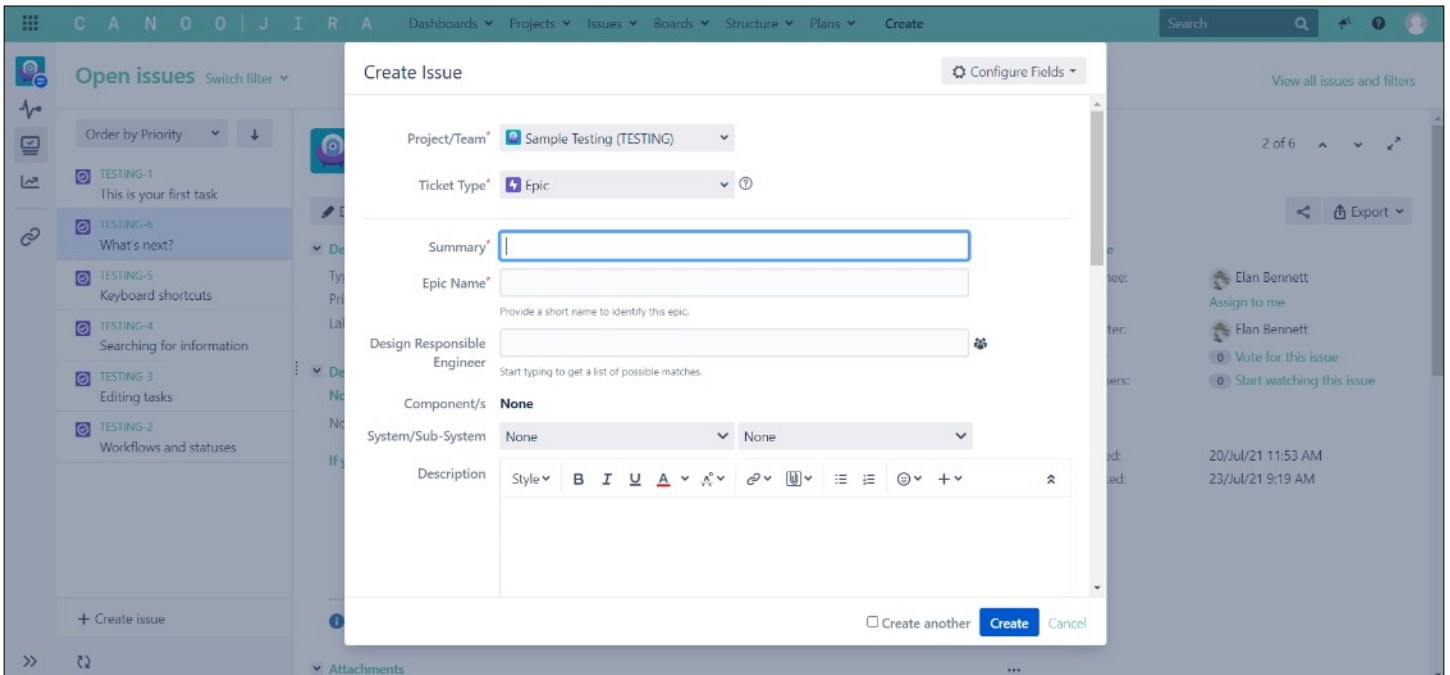
- **Create a New Issue**
- **Edit Issue Information**
- **Change Workflow Status**
- **Link Issues Together**
- **Migrate an Issue**
- **Create a Subtask**

Create a New Issue

1. In the top bar, click **Create**.



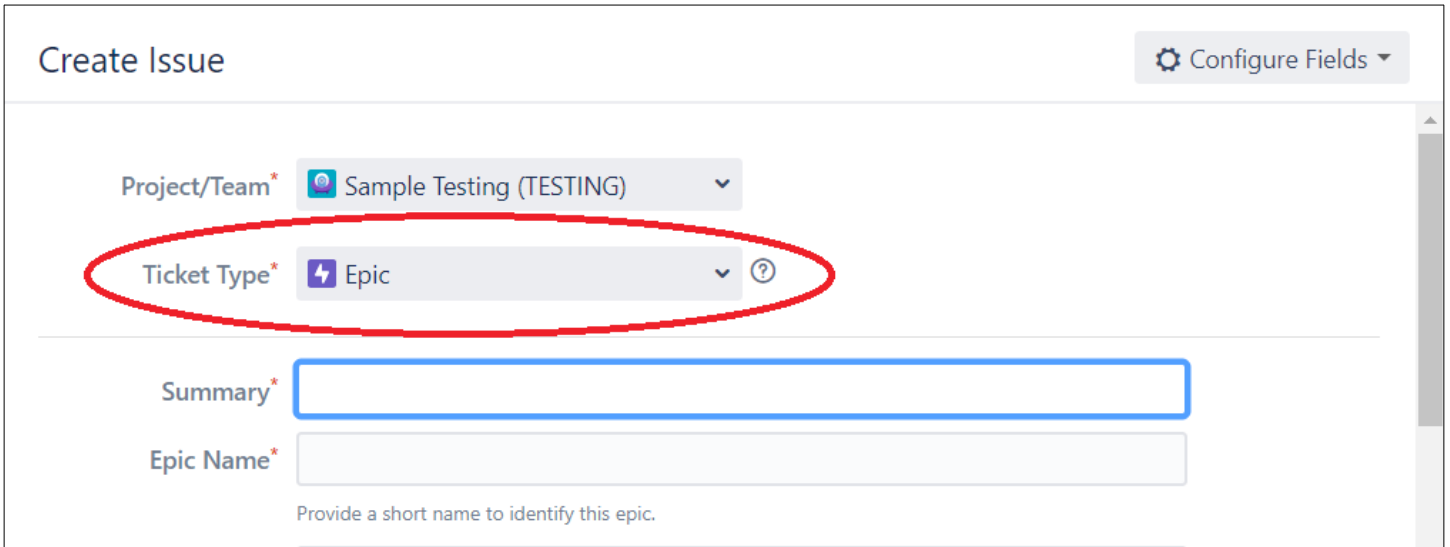
The **Create Issue** window should appear:



2. In the **Create Issue** window, make sure that the **Sample Testing** project is shown as the Project/Team:

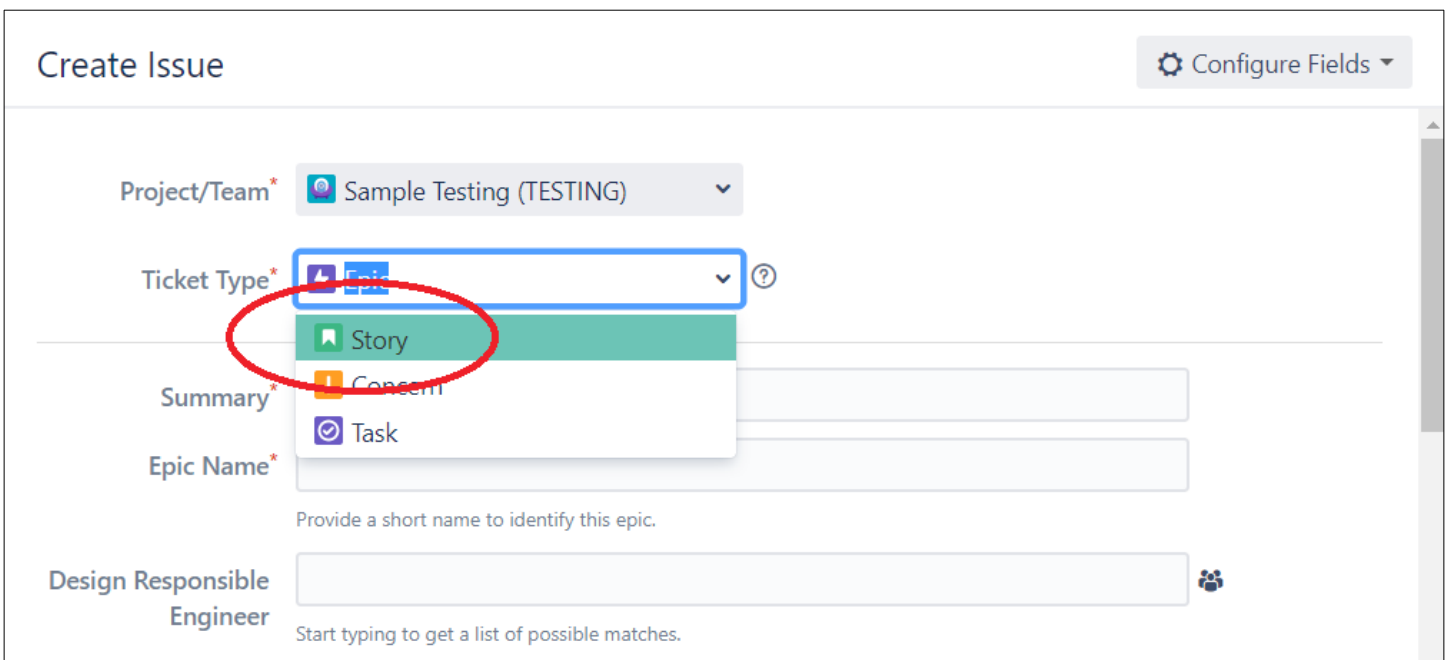
The screenshot shows the 'Create Issue' window. At the top left is the title 'Create Issue' and at the top right is a 'Configure Fields' button with a gear icon. Below the title bar, the 'Project/Team' dropdown is highlighted with a red oval and contains 'Sample Testing (TESTING)'. Below it, the 'Ticket Type' dropdown is set to 'Epic'. The 'Summary' field is empty and highlighted with a blue border. Below the summary is the 'Epic Name' field with a placeholder text: 'Provide a short name to identify this epic.' Below that is the 'Design Responsible Engineer' field with a placeholder text: 'Start typing to get a list of possible matches.' Below the engineer field, the 'Component/s' is set to 'None'. The 'System/Sub-System' has two dropdowns, both set to 'None'. Below these is the 'Description' field with a rich text editor toolbar containing options for style, bold, italic, underline, text color, background color, link, unlink, list, and emoji. At the bottom right, there are three buttons: 'Create another' (with a checkbox), 'Create' (in a blue box), and 'Cancel'.

3. Click in the **Ticket Type** box.



The screenshot shows the 'Create Issue' form. At the top right is a 'Configure Fields' button. The 'Project/Team' dropdown is set to 'Sample Testing (TESTING)'. The 'Ticket Type' dropdown is set to 'Epic' and is circled in red. Below it are text input fields for 'Summary' and 'Epic Name'. A note below the 'Epic Name' field says 'Provide a short name to identify this epic.'

When the menu appears, click **Story**.

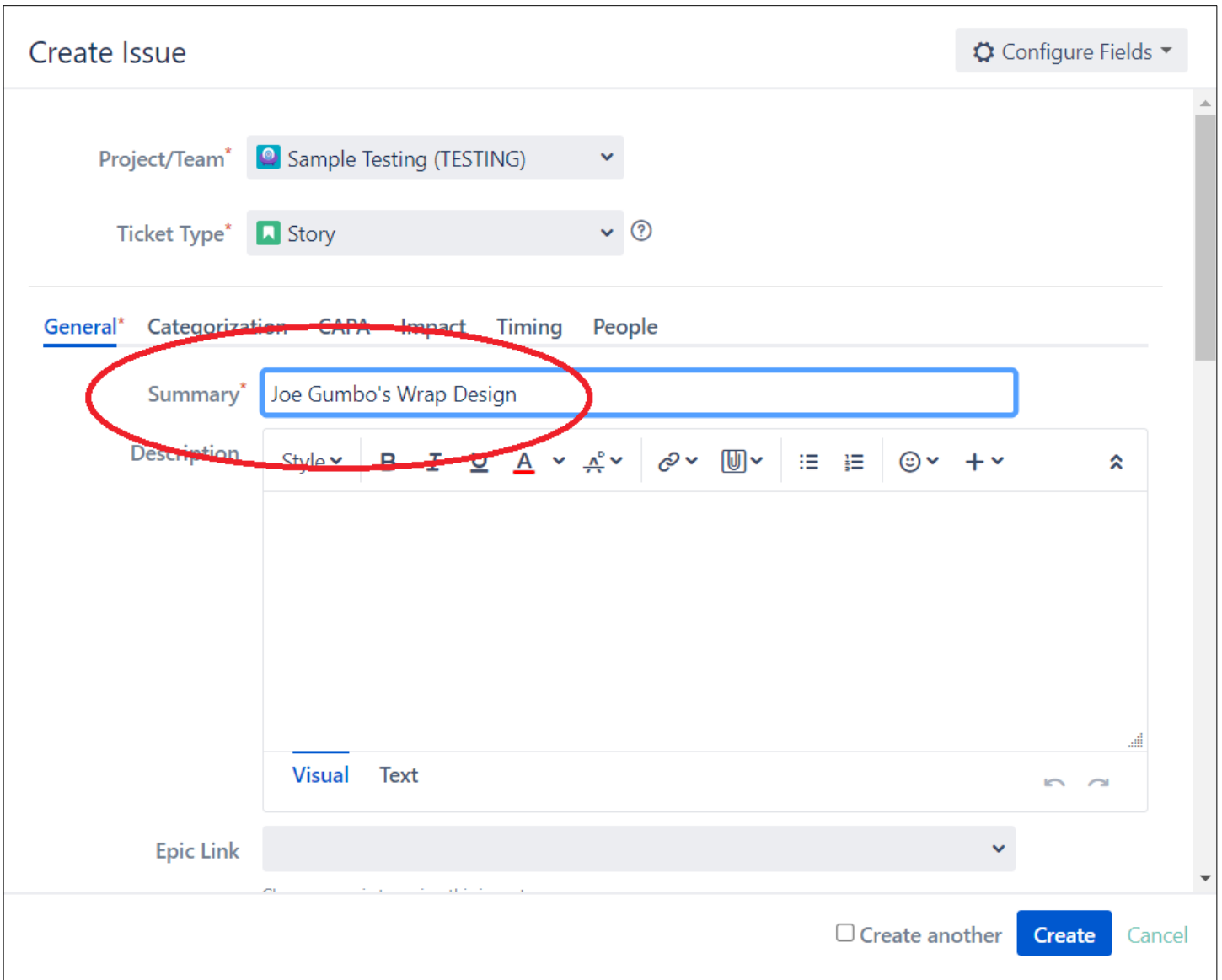


The screenshot shows the 'Create Issue' form with the 'Ticket Type' dropdown menu open. The menu options are 'Epic', 'Story', 'Consent', and 'Task'. The 'Story' option is highlighted in green and circled in red. The 'Summary' and 'Epic Name' fields are visible. A note below the 'Epic Name' field says 'Provide a short name to identify this epic.' Below these fields is a 'Design Responsible Engineer' field with a user selection icon and a note: 'Start typing to get a list of possible matches.'

Note: Story is the standard issue type at Canoo. It's not as big in scope as an Epic, or as specialized as a Task.

4. In the **Summary** box, type:

[Your Name]'s Wrap Design



The screenshot shows the 'Create Issue' interface. At the top, there is a 'Configure Fields' button. Below it, the 'Project/Team' is set to 'Sample Testing (TESTING)' and the 'Ticket Type' is 'Story'. The 'General' tab is active, and the 'Summary' field is highlighted with a red circle, containing the text 'Joe Gumbo's Wrap Design'. Below the summary is the 'Description' field with a rich text editor toolbar. At the bottom, there is an 'Epic Link' dropdown and buttons for 'Create another', 'Create', and 'Cancel'.

"Joe Gumbo" is the name used in the example, but you'll want to put your own name in there, to distinguish your work in this tutorial from other Canoo employees'.

8. Click **Categorization** to view the information that can be added in that category:

Create Issue ⚙️ Configure Fields ▾

Project/Team* 👤 Sample Testing (TESTING) ▾

Ticket Type* 📄 Story ▾ ?

General* **Categorization** CAPA Impact Timing People

Component/s **None**

Story Type None ▾

Reason for Change Cost Reduction
 Mass Reduction
 Improved Design
 Other

Implementation Phase None ▾

Affects Version/s **None**

Fix Version/s **None**

Test Type None ▾

Create another **Create** Cancel

9. Click **CAPA**.

The screen should look like this:

The screenshot shows a 'Create Issue' form. At the top right, there is a 'Configure Fields' button with a gear icon. Below this, there are two dropdown menus: 'Project/Team*' with 'Sample Testing (TESTING)' selected, and 'Ticket Type*' with 'Story' selected. A horizontal tab bar contains five tabs: 'General*', 'Categorization', 'CAPA', 'Impact', and 'Timing', and 'People'. The 'CAPA' tab is highlighted with a red circle. Below the tabs, the 'Interim Containment Action' section is visible, featuring a large text input area and a question: 'What action was taken to quickly contain the incident?'. At the bottom right, there are three buttons: 'Create another' with a checkbox, 'Create' (a blue button), and 'Cancel'.

10. Click Impact.

The screen should look like this:

The screenshot shows a 'Create Issue' form with the following elements:

- Project/Team***: Sample Testing (TESTING) (dropdown)
- Ticket Type***: Story (dropdown with help icon)
- Navigation Tabs**: General* (selected), Categorization, CAPA, **Impact** (highlighted with a red circle), Timing, People
- Input Fields**:
 - Mass ±kg: 0.001
 - Cost ±\$: 0.001
 - Investment ±\$: 0.001
 - Timing ±wks: 0.001
- Text**: How is timing affected based on this story?
- Cross-Functional Systems Impact** (checkboxes):
 - ADAS
 - Attributes
 - CAE
 - Chassis
 - Class A
 - Closures
 - Device Transmittal (DT)
- Footer**: Create another, **Create** (button), Cancel

11. Click Timing.

The screen should look like this:

The screenshot shows the 'Create Issue' form. At the top right, there is a 'Configure Fields' button with a gear icon. Below this, there are two dropdown menus: 'Project/Team*' set to 'Sample Testing (TESTING)' and 'Ticket Type*' set to 'Story'. A horizontal tab bar contains 'General*', 'Categorization', 'CAPA', 'Impact', 'Timing', and 'People'. The 'Timing' tab is highlighted with a blue border and a red circle. Under the 'Timing' tab, there are three date/time fields: 'Urgency' (set to 'None'), 'Due Date', 'Planned Start Date/Time' (with a subtext 'The scheduled beginning of progress (work starts)'), and 'Planned End Date/Time' (with a subtext 'The scheduled end of work (progress stopping)'). At the bottom right, there are three buttons: 'Create another' (with a checkbox), 'Create' (in a blue box), and 'Cancel'.

12. Click **People**.


The screen should look like this:


Create Issue Configure Fields


Project/Team* Sample Testing (TESTING)


Ticket Type* Story

General* Categorization CAPA Impact Timing **People**

Design Responsible Engineer 
Start typing to get a list of possible matches.

System Responsible Engineer 
Start typing to get a list of possible matches.
The person who is responsible and owns the entire system

Program Manager 

Buyer 
Start typing to get a list of possible matches.

View Access (only if using Issue Security)

Create another Create Cancel

13. In the **People** category, click in the **Design Responsible Engineer** box.

Type your name in the box.

The screenshot shows the 'Create Issue' form with the following elements:

- Project/Team***: Sample Testing (TESTING)
- Ticket Type***: Story
- General***, **Categorization**, **CAPA**, **Impact**, **Timing**, **People** (selected tab)
- Design Responsible Engineer**: Joe Gumbo (highlighted with a red circle)
- System Responsible Engineer**: (empty)
- Program Manager**: (empty)
- Buyer**: (empty)
- View Access (only if using Issue Security)**: (empty)
- Buttons**: Create another, **Create**, Cancel

14. When the menu appears with your name in it, click your name.

The screenshot shows the 'Create Issue' form with the following fields and options:

- Project/Team***: Sample Testing (TESTING)
- Ticket Type***: Story
- Configuration**: Configure Fields
- Tabs**: General*, Categorization, CAPA, Impact, Timing, **People**
- Design Responsible Engineer**: A dropdown menu is open, showing a list of employees. The first option, **Chris Charuhas - Chris.Charuhas@canoo.com (Chris.Charuhas)**, is highlighted in green and circled in red.
- System Responsible Engineer**: A dropdown menu is open, showing a list of employees.
- Program Manager**: A dropdown menu is open, showing a list of employees.
- Buyer**: A dropdown menu is open, showing a list of employees.
- View Access (only if using Issue Security)**: A dropdown menu is open, showing a list of employees.
- Buttons**: Create another, **Create**, Cancel

Note: the real name of a Canoo employee must be entered for it to appear.


Your name should appear in the **Design Responsible Engineer** box.


Create Issue ⚙️ Configure Fields ▾


Project/Team* 📁 Sample Testing (TESTING) ▾


Ticket Type* 📄 Story ▾ ⓘ

General* Categorization CAPA Impact Timing People

Design Responsible Engineer 
Start typing to get a list of possible matches.

System Responsible Engineer 
Start typing to get a list of possible matches.
The person who is responsible and owns the entire system

Program Manager 
Start typing to get a list of possible matches.

Buyer 
Start typing to get a list of possible matches.

View Access (only if using Issue Security)

Create another Create Cancel

15. Click the **Create** button at the bottom of the window.

Create Issue ⚙️ Configure Fields ▾

Project/Team* 👤 Sample Testing (TESTING) ▾

Ticket Type* 📄 Story ▾ ?

General* Categorization CAPA Impact Timing People

Design Responsible Engineer 👤
Start typing to get a list of possible matches.

System Responsible Engineer 👤
Start typing to get a list of possible matches.
The person who is responsible and owns the entire system

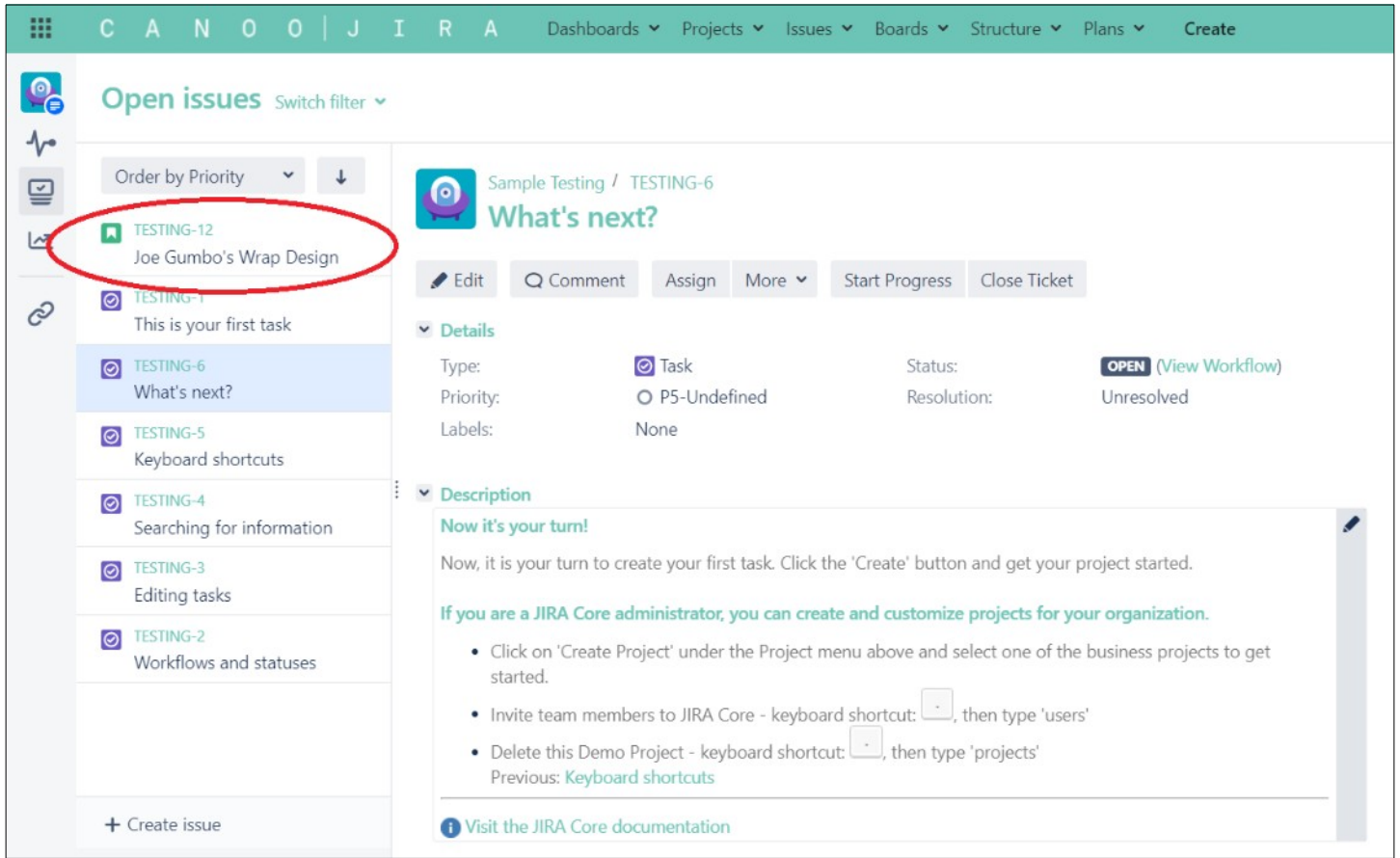
Program Manager 👤
Start typing to get a list of possible matches.

Buyer 👤
Start typing to get a list of possible matches.

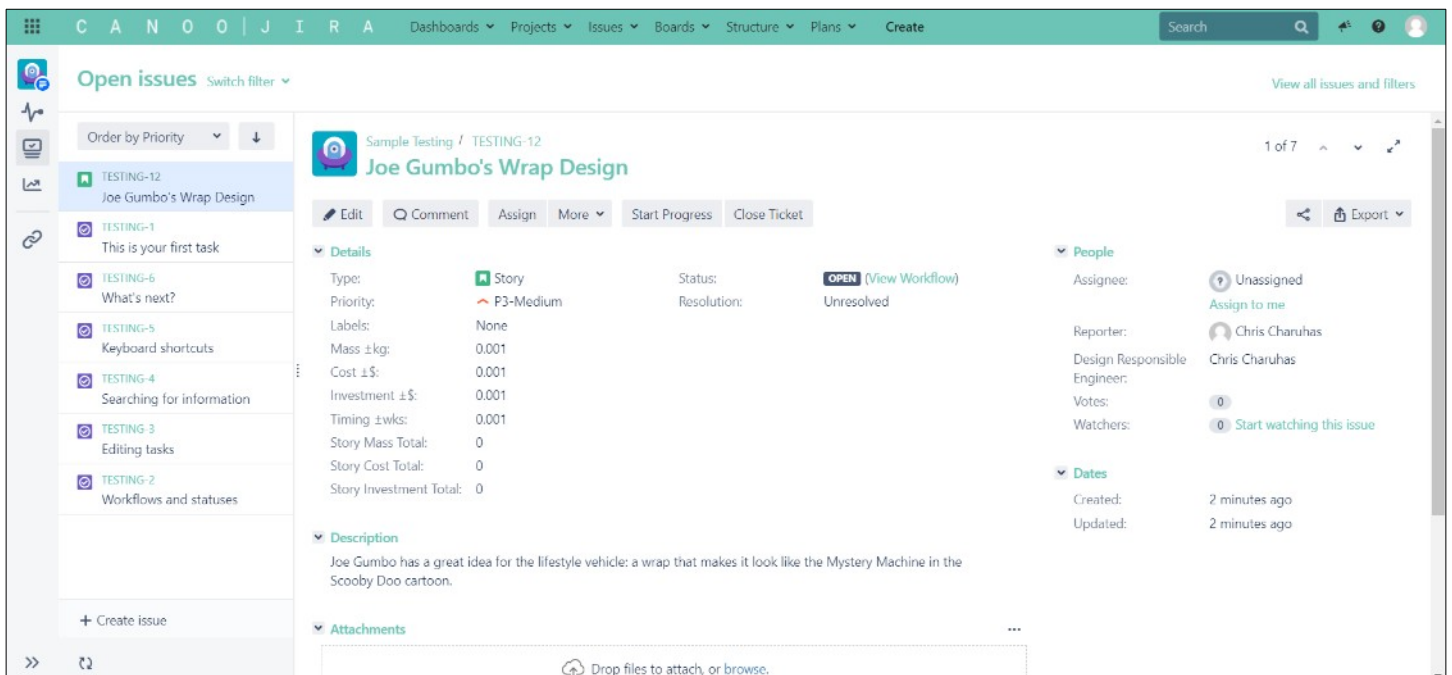
View Access (only if using Issue Security)

Create another Create Cancel

16. Refresh the page in the browser, then click on the issue.



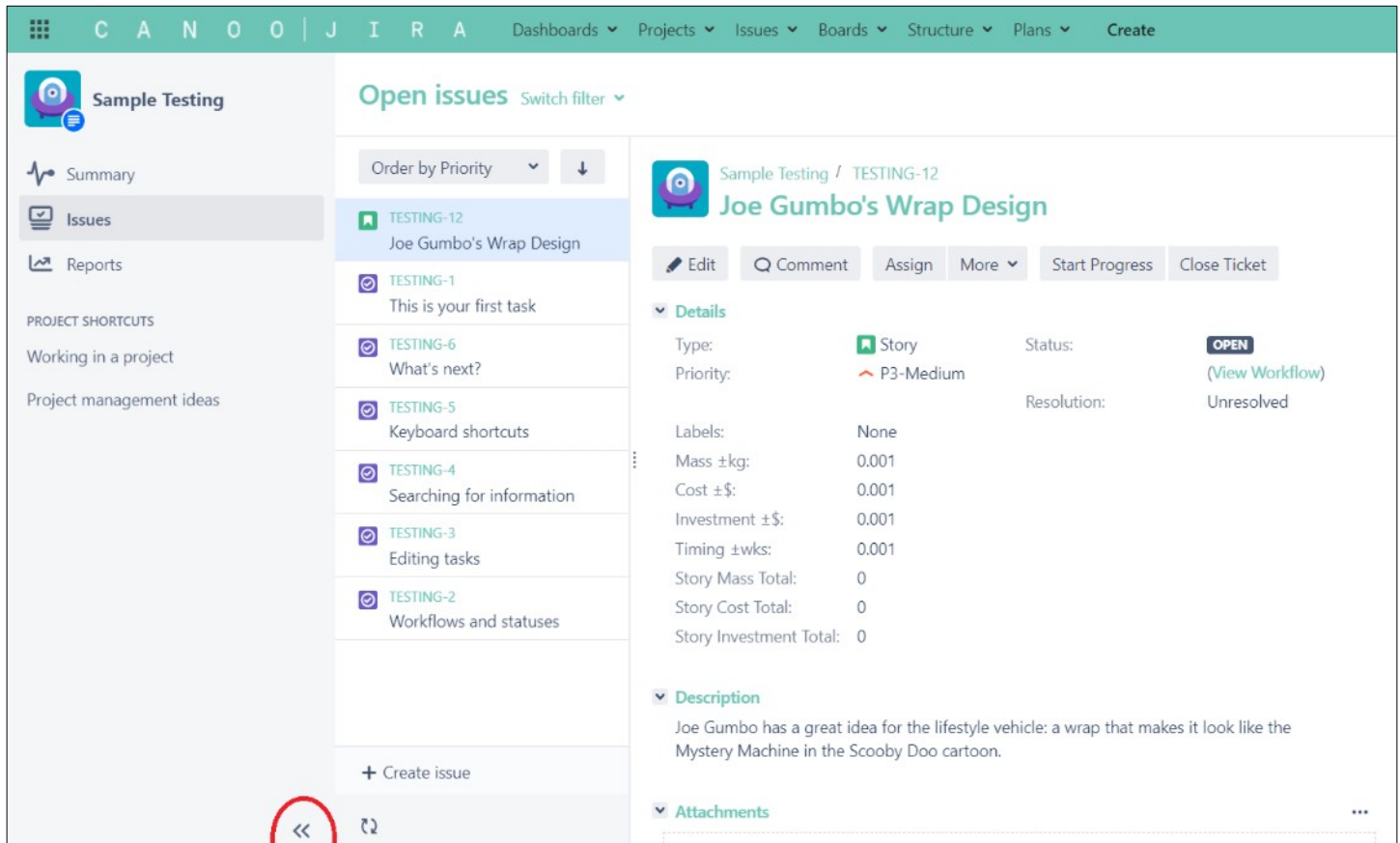
The screen should look like this:



Edit Issue Information

Edit Details

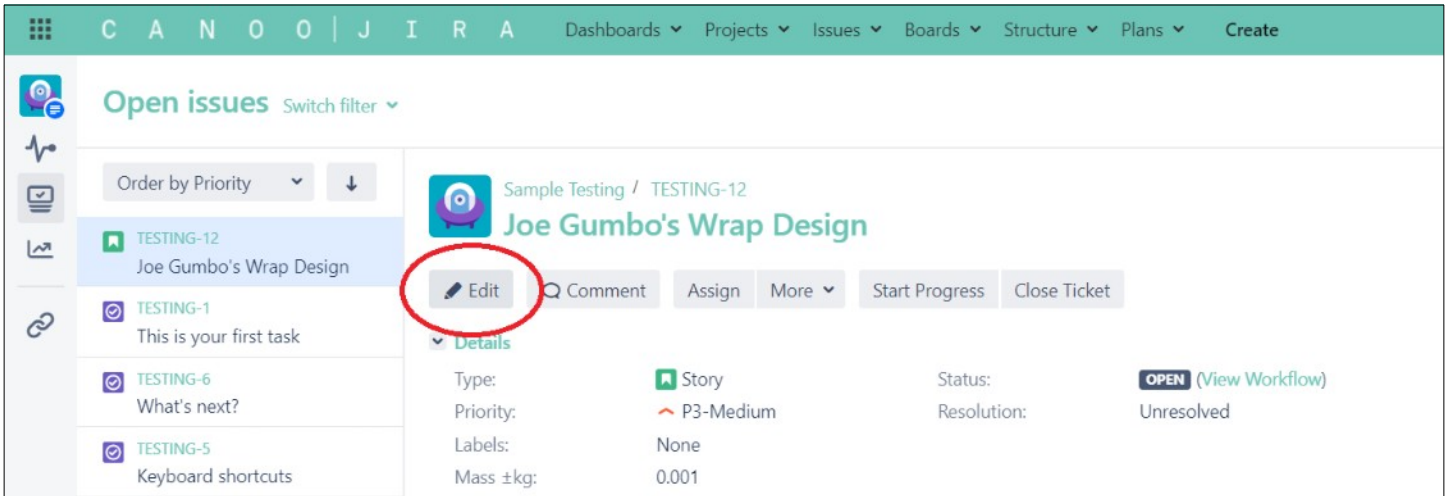
1. If your sidebar is fully open, click the double-arrow at the bottom.



This should collapse the sidebar.

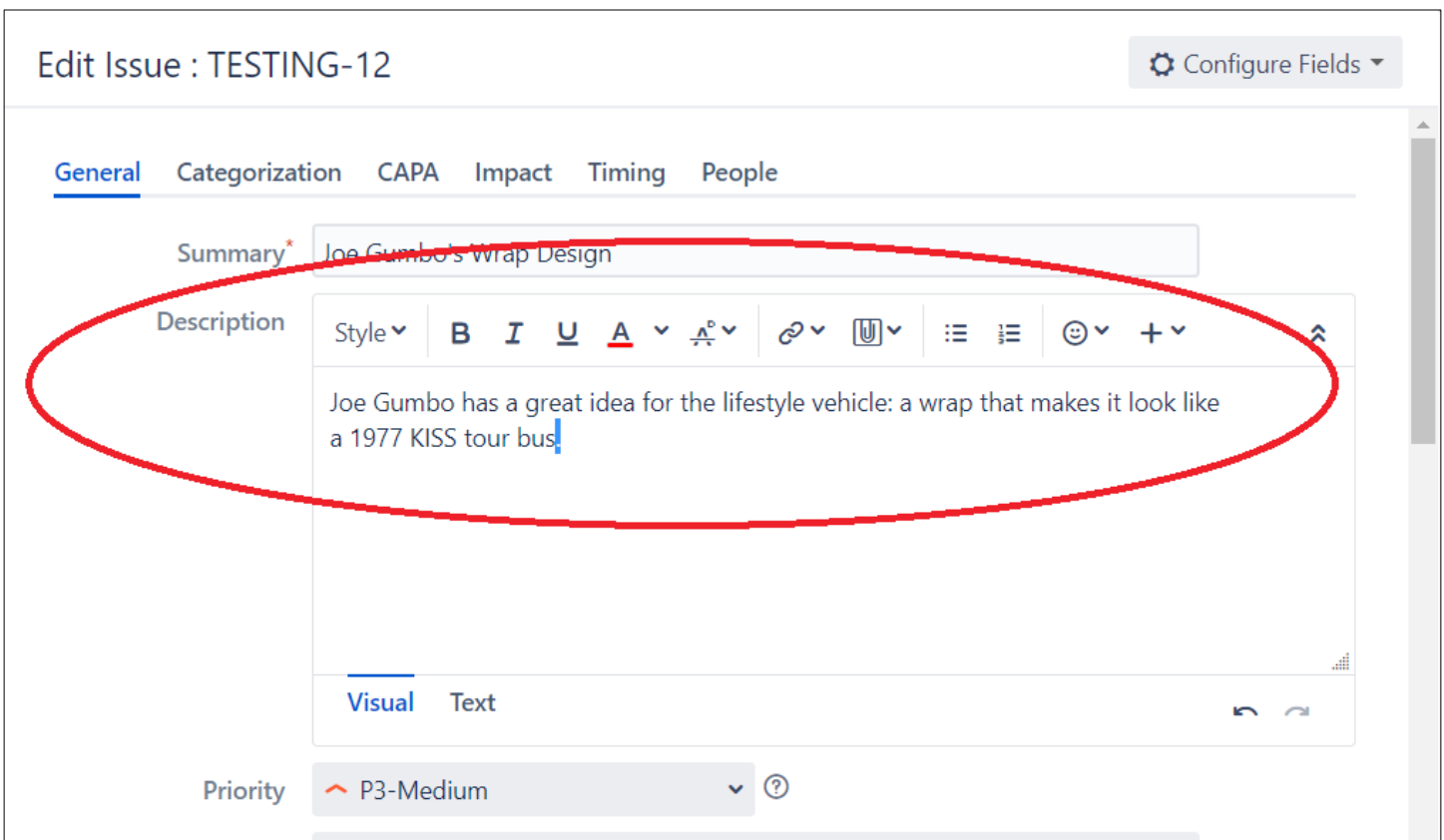
2. Make sure the issue you created is open.

3. Click the **Edit** button.



4. When the **Edit Issue** window appears, change the description of the issue to read:

[Your Name] has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.



5. Click the **Update** button.

Edit Issue : TESTING-12 Configure Fields

General Categorization CAPA Impact Timing People

Summary* Joe Gumbo's Wrap Design

Description

Style **B** *I* U A [°]

Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.

Visual Text

Priority P3-Medium

Epic Link

Choose an epic to assign this issue to.

Attachment Drop files to attach, or browse.

Next Steps

Update [Cancel](#)

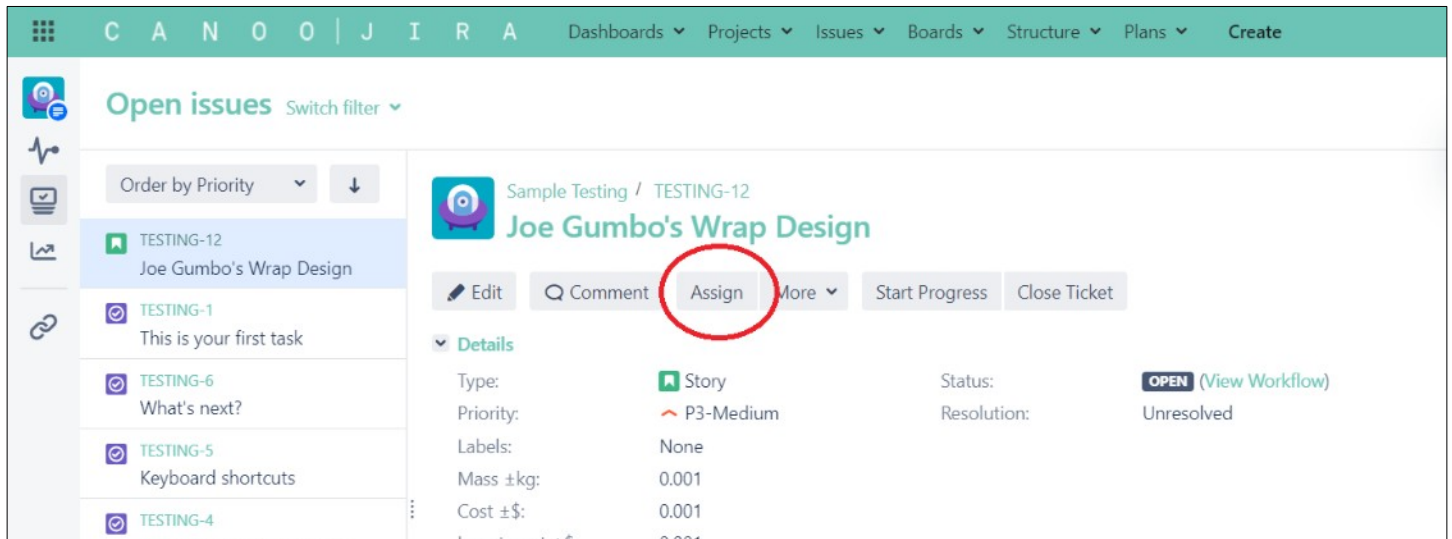
The issue should now look like this:

The screenshot shows the JIRA interface for an issue titled "Joe Gumbo's Wrap Design" (TESTING-12). The top navigation bar includes "C A N O O | J I R A" and various menu items like "Dashboards", "Projects", "Issues", "Boards", "Structure", "Plans", and "Create". The left sidebar shows a list of "Open issues" with "TESTING-12 Joe Gumbo's Wrap Design" selected. The main content area displays the issue details:

- Issue Title:** Joe Gumbo's Wrap Design (TESTING-12)
- Actions:** Edit, Comment, Assign, More, Start Progress, Close Ticket
- Details:**
 - Type: Story
 - Priority: P3-Medium
 - Status: OPEN (View Workflow)
 - Resolution: Unresolved
 - Labels: None
 - Mass ±kg: 0.001
 - Cost ±\$: 0.001
 - Investment ±\$: 0.001
 - Timing ±wks: 0.001
 - Story Mass Total: 0
 - Story Cost Total: 0
 - Story Investment Total: 0
- Description:** Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.
- Attachments:** (None listed)

Edit Assignee

1. Click the **Assign** button.



2. When the **Assign** window appears, type your name in the **Assignee** box.


3. When the menu appears, click your name.



It should now appear in the **Assignee** box.






4. Click the **Assign** button.




Assign: TESTING-12


Assignee  Chris Charuhas

Assign to me

Comment

Style **B** *I* U A     + 

Visual Text    Viewable by All Users

Shortcut tip: Pressing  a also opens this dialog box

Assign Cancel

In the main issue screen, your name should appear as the Assignee in the People section:

C A N O O | J I R A Dashboards Projects Issues Boards Structure Plans Create Search

Open issues Switch filter

Order by Priority

TESTING-12 Joe Gumbo's Wrap Design

TESTING-1 This is your first task

TESTING-6 What's next?

TESTING-5 Keyboard shortcuts

TESTING-4 Searching for information

TESTING-3 Editing tasks

TESTING-2 Workflows and statuses

+ Create issue

Sample Testing / TESTING-12 Joe Gumbo's Wrap Design 1 of 7

Edit Comment Assign More Start Progress Close Ticket

Details

Type: Story Status: OPEN (View Workflow)

Priority: P3-Medium Resolution: Unresolved

Labels: None

Mass ±kg: 0.001

Cost ±\$: 0.001

Investment ±\$: 0.001

Timing ±wks: 0.001

Story Mass Total: 0

Story Cost Total: 0

Story Investment Total: 0

Description

Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.

Attachments

Drop files to attach, or browse.

People

Assignee: Chris Charuhas

Reporter: Chris Charuhas

Design Responsible: Chris Charuhas

Engineer:

Votes: 0

Watchers: 0 Start watching this issue

Dates

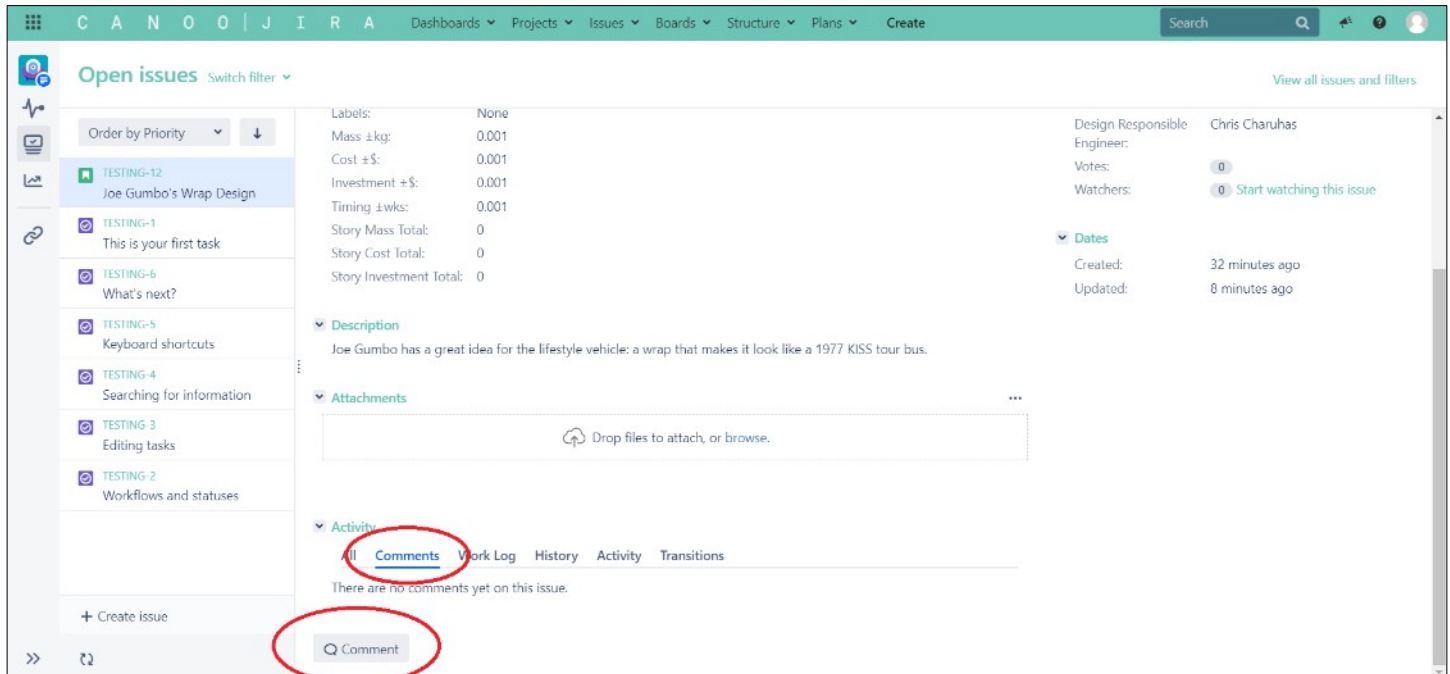
Created: 23 minutes ago

Updated: Just now

Edit Comments

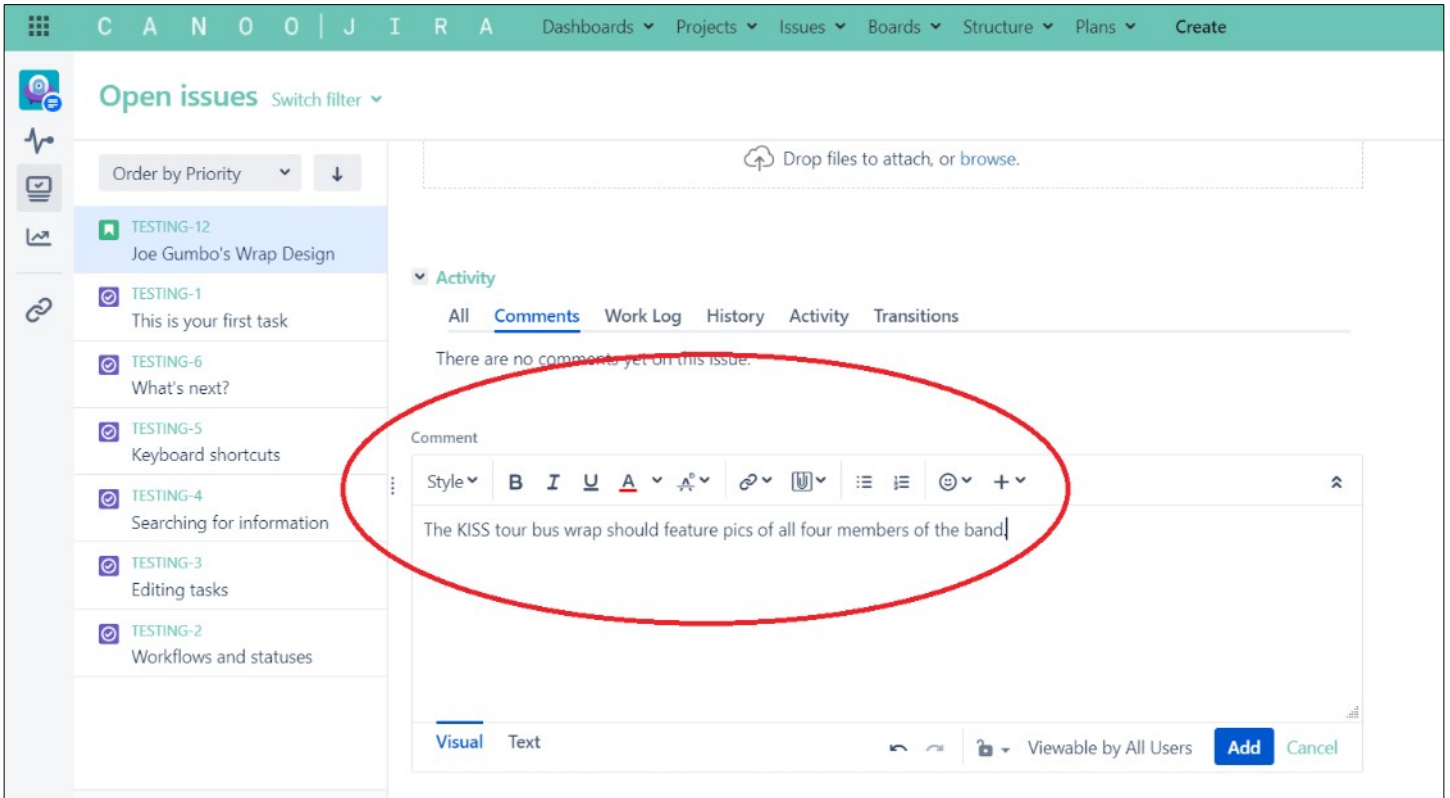
Note: Comments are what we use to communicate with other people at Canoo who are working on an issue.

1. Scroll down to the bottom of the main issue screen.
2. In the **Activity** list, click **Comments**, then click the **Comment** button.

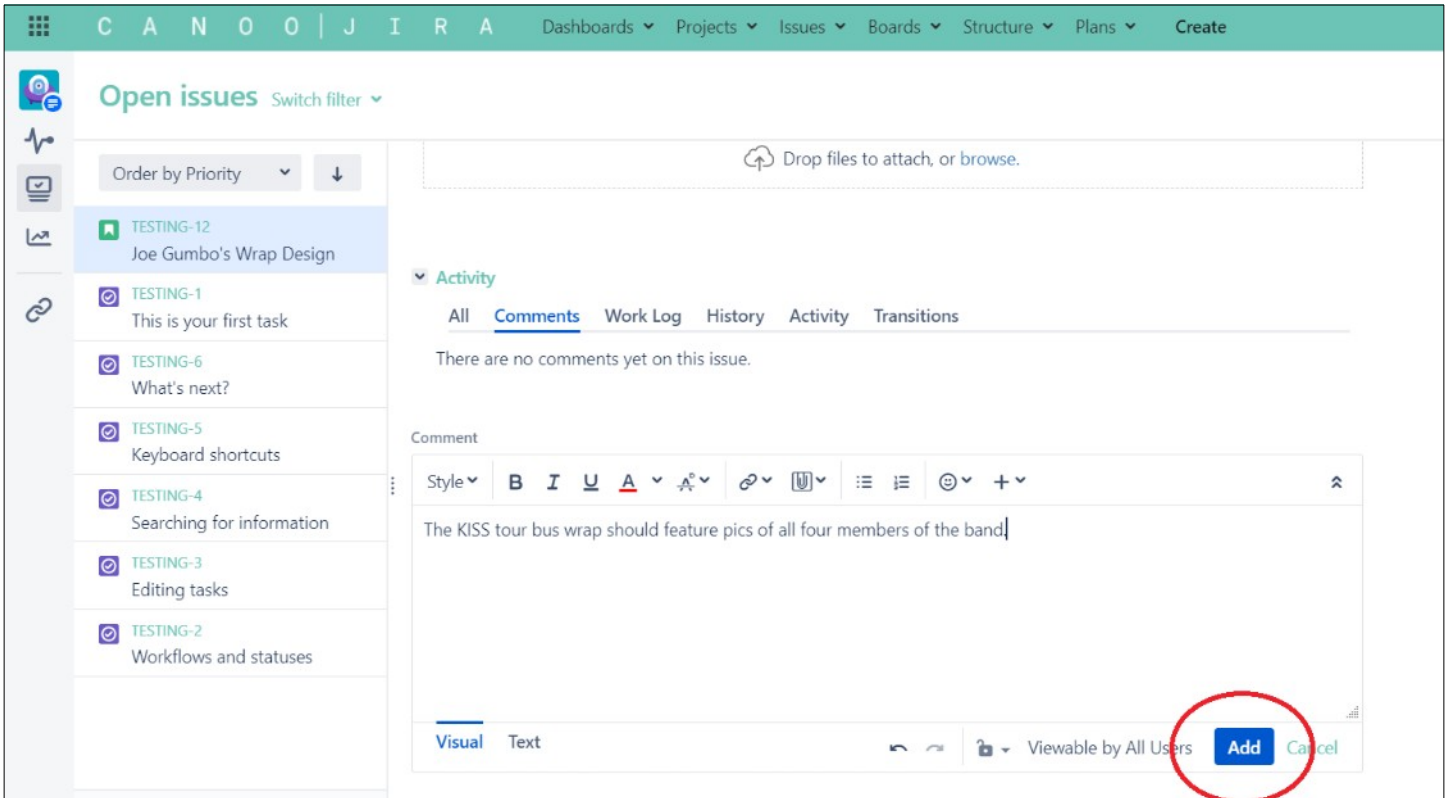


3. In the **Comment** text box, type:

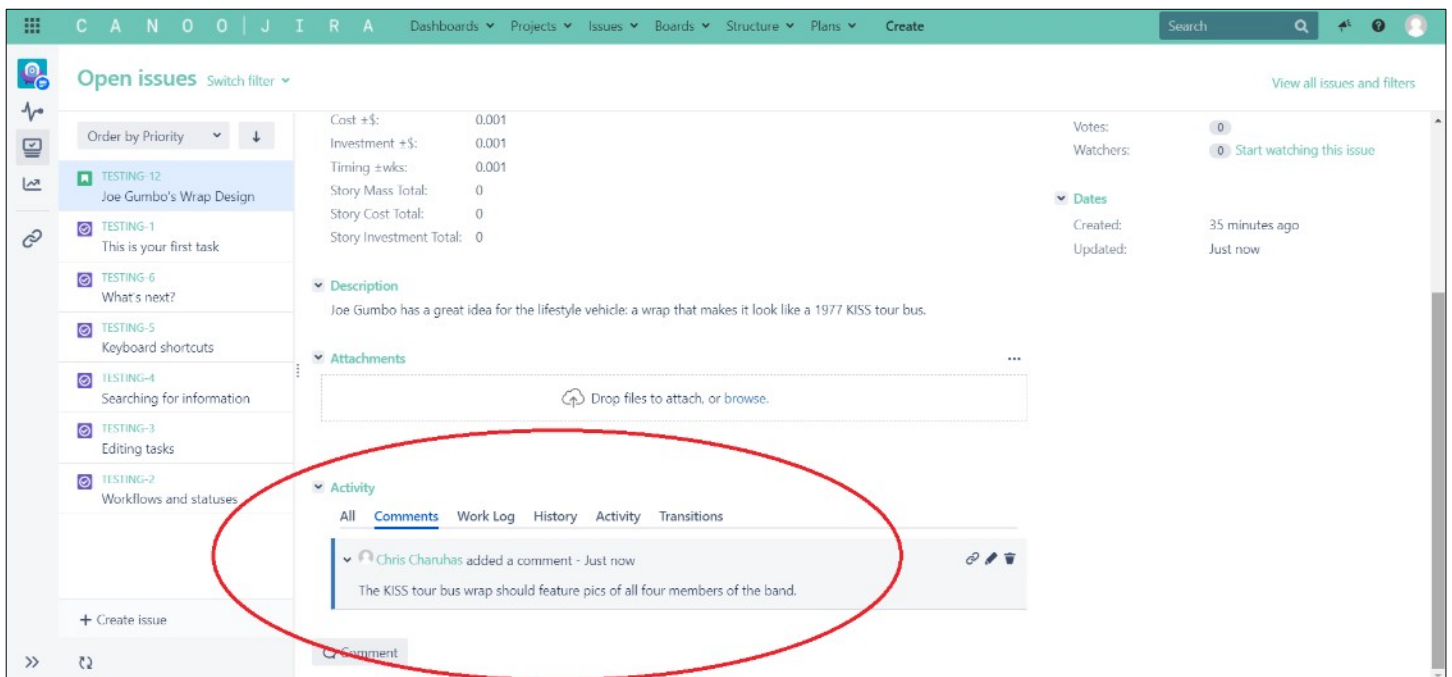
The KISS tour bus wrap should feature pics of all four members of the band.



4. Click the **Add** button.



The comment should now appear on the screen:



Change Workflow Status

1. Scroll to the top of the issue screen.
2. In the **Details** area, next to **Status**, click **View Workflow**.

The screenshot shows the JIRA interface for an issue titled "Joe Gumbo's Wrap Design" (ID: TESTING-12). The issue is currently in the "OPEN" status, and the "View Workflow" link is circled in red. The interface includes a sidebar with a list of open issues, a main details section, and a description.

Open issues Switch filter ▾

Order by Priority ▾ ↓

- TESTING-12 Joe Gumbo's Wrap Design
- TESTING-1 This is your first task
- TESTING-6 What's next?
- TESTING-5 Keyboard shortcuts
- TESTING-4 Searching for information
- TESTING-3 Editing tasks
- TESTING-2 Workflows and statuses

Sample Testing / TESTING-12
Joe Gumbo's Wrap Design

Edit Comment Assign More ▾ Start Progress Close Ticket

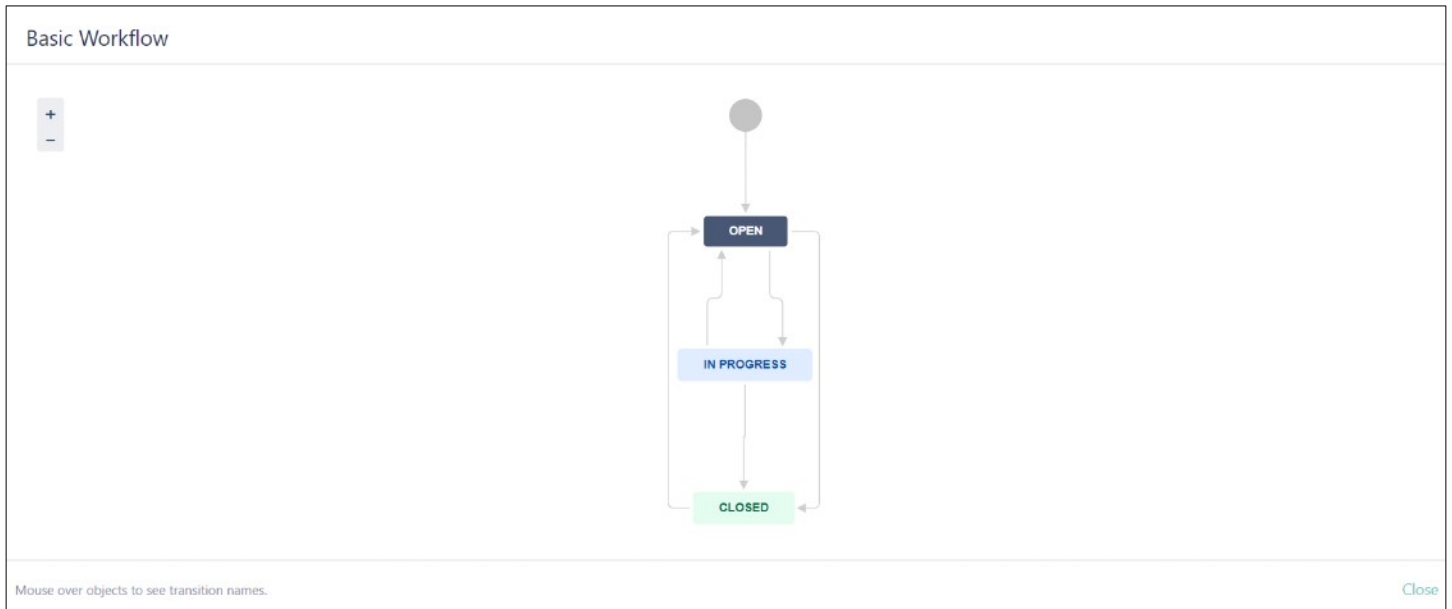
Details

Type:	Story	Status:	OPEN (View Workflow)
Priority:	P3-Medium	Resolution:	Unresolved
Labels:	None		
Mass ±kg:	0.001		
Cost ±\$:	0.001		
Investment ±\$:	0.001		
Timing ±wks:	0.001		
Story Mass Total:	0		
Story Cost Total:	0		
Story Investment Total:	0		

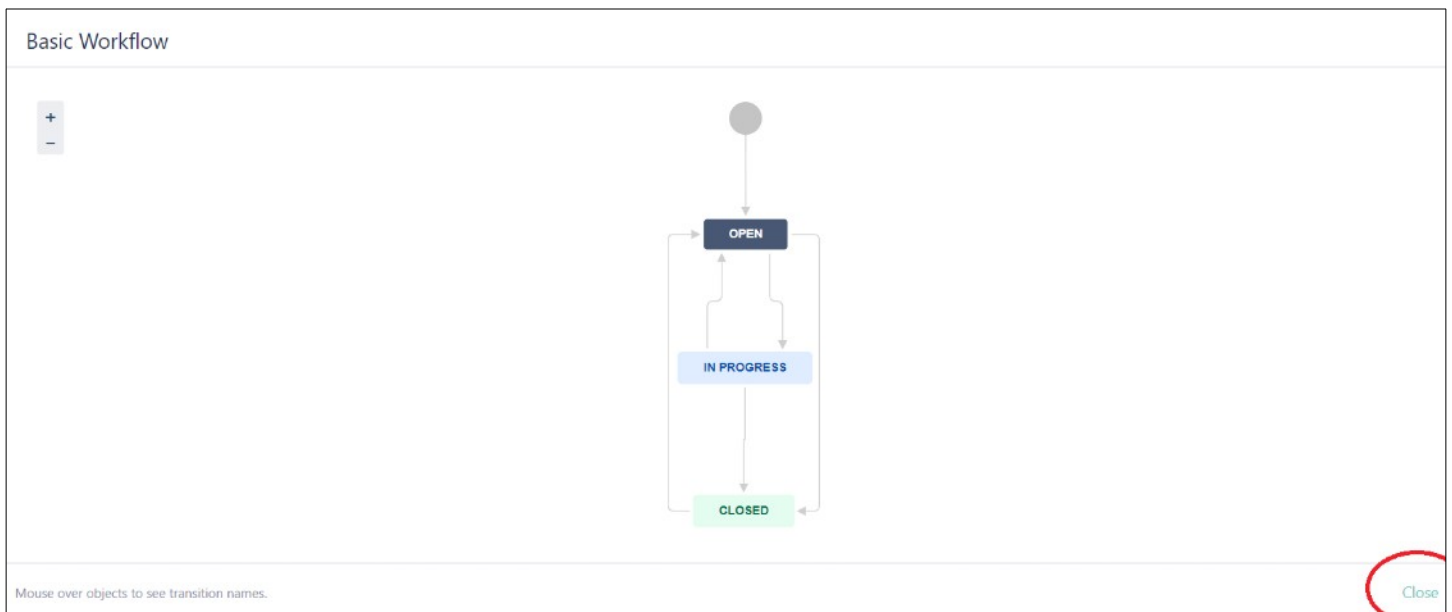
Description

Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.

The **Basic Workflow** window should appear, showing the workflow steps for this issue: Open, In Progress, and Closed.



3. Click the **Close** link.



4. Click the **Start Progress** button.

The screenshot shows the JIRA interface for an issue titled "Joe Gumbo's Wrap Design" under the project "Sample Testing / TESTING-12". The issue is currently in the "OPEN" status. The "Start Progress" button is circled in red. The interface includes a sidebar with a list of issues, a main content area with details and description, and a top navigation bar with various menu items like "Dashboards", "Projects", "Issues", "Boards", "Structure", "Plans", and "Create".


5. When the **Start Progress** window appears, type in the **Comment** text box:


Let's get started ASAP on designing the KISS tour bus wrap.

The screenshot shows the "Start Progress" dialog box. It contains fields for "Assignee" (Chris Charuhas), "Priority" (P3-Medium), and "Fix Version/s" (None). The "Due Date" field is empty. The "Comment" text box is circled in red and contains the text "Let's get started ASAP on designing the KISS tour bus wrap." The dialog box also features a rich text editor toolbar with options for bold, italic, underline, text color, background color, link, unlink, list, and emoji.


6. Click the **Start Progress** button at the bottom of the window.

Start Progress







Assignee  Chris Charuhas ▼

Priority  P3-Medium ▼ ?




Fix Version/s **None**

Due Date 

Comment

Style ▼ **B** *I* U A ▼  ▼  ▼    ▼ **+** ▼ 

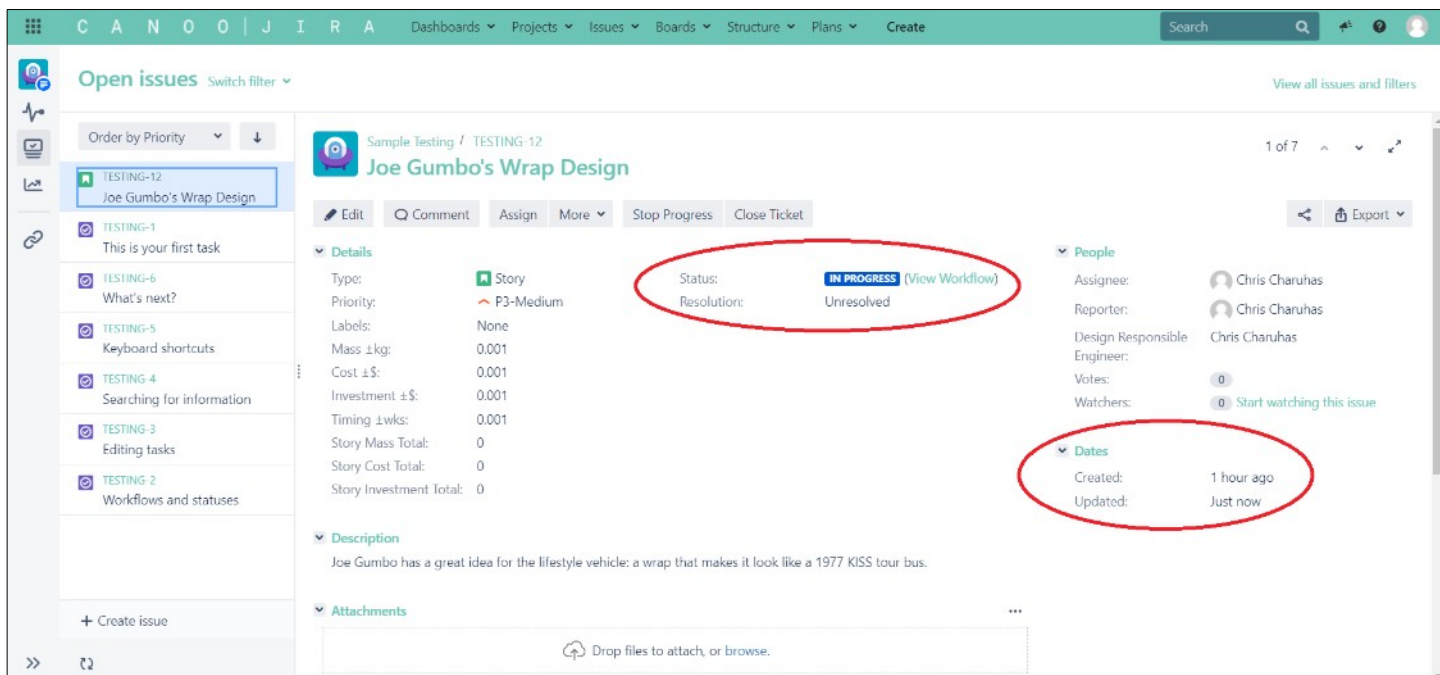
Let's get started ASAP on designing the KISS tour bus wrap.

Visual Text    ▼ Viewable by All Users

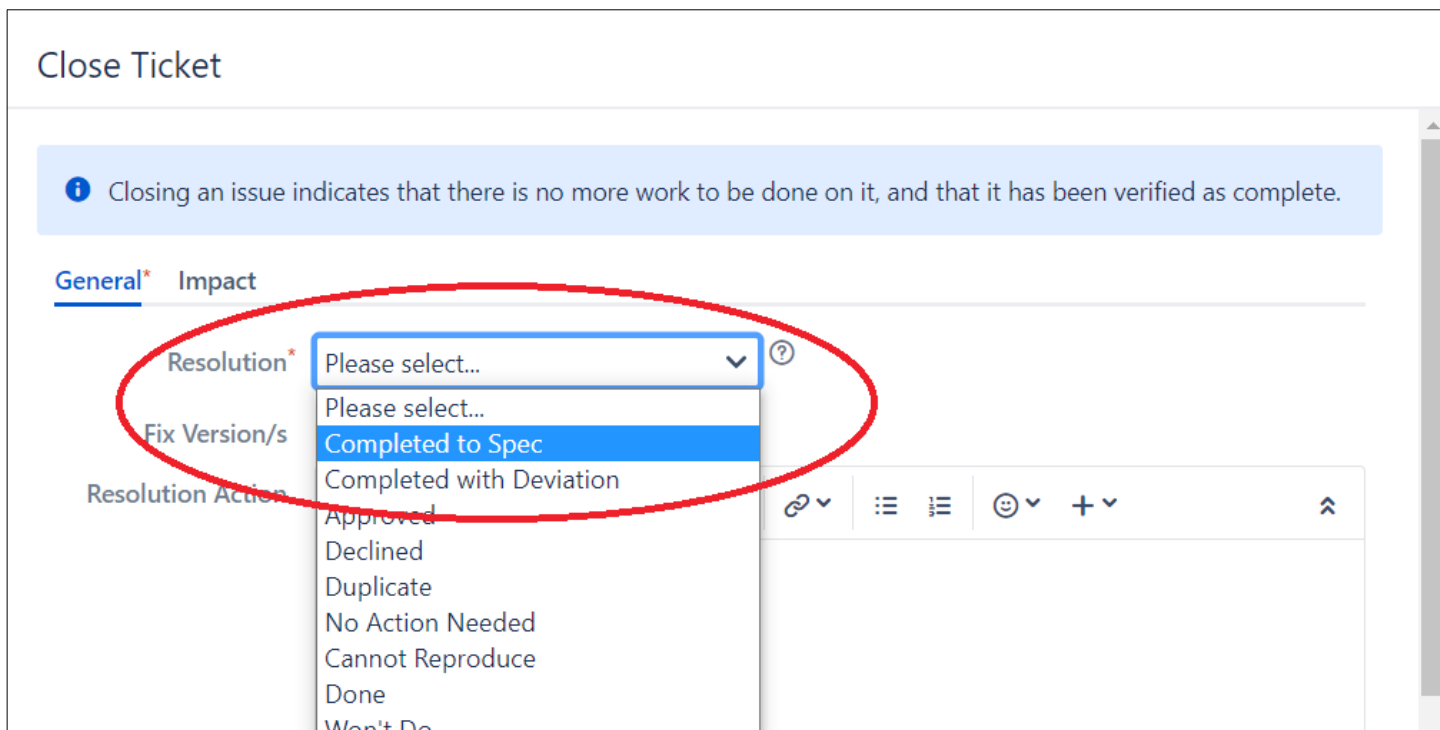
Start Progress [Cancel](#)

In the main issue screen, the Status of this issue should now read: In Progress.

The **Dates** area should show when progress was started on this issue.

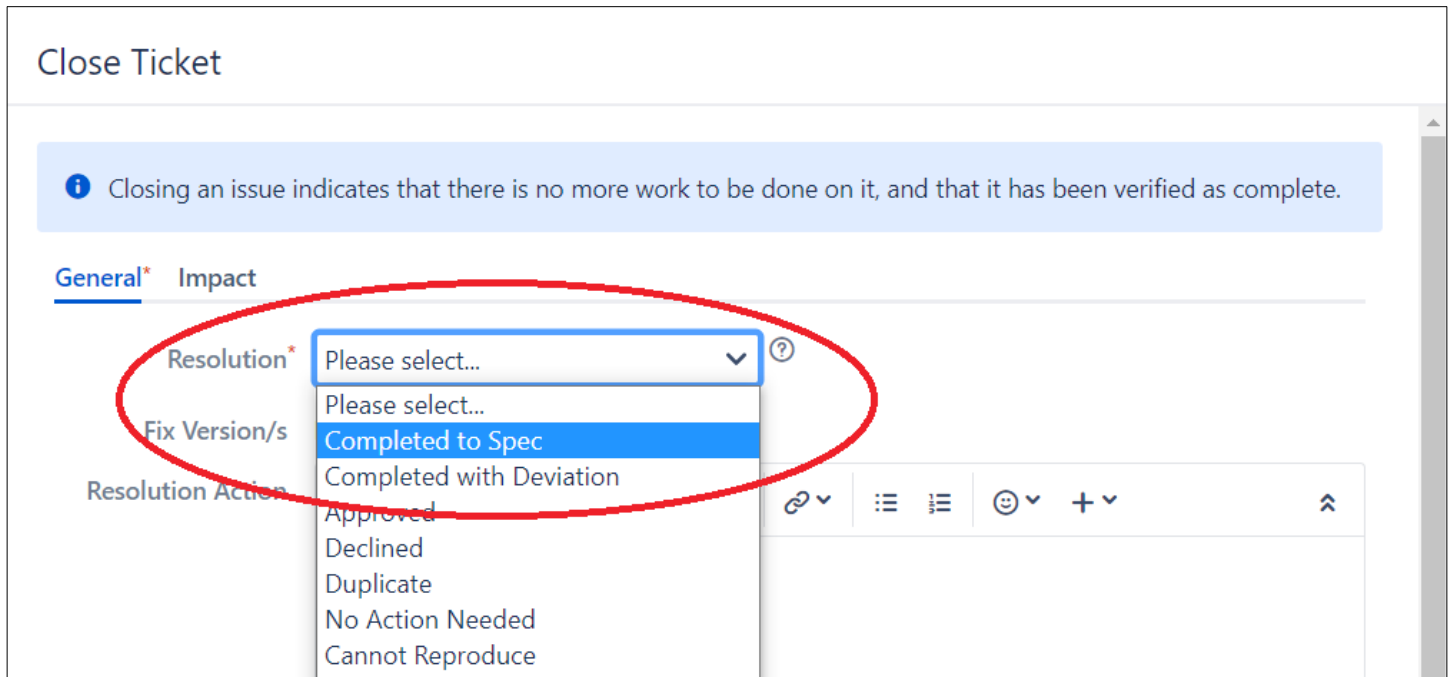


7. Click the **Close Ticket** button.



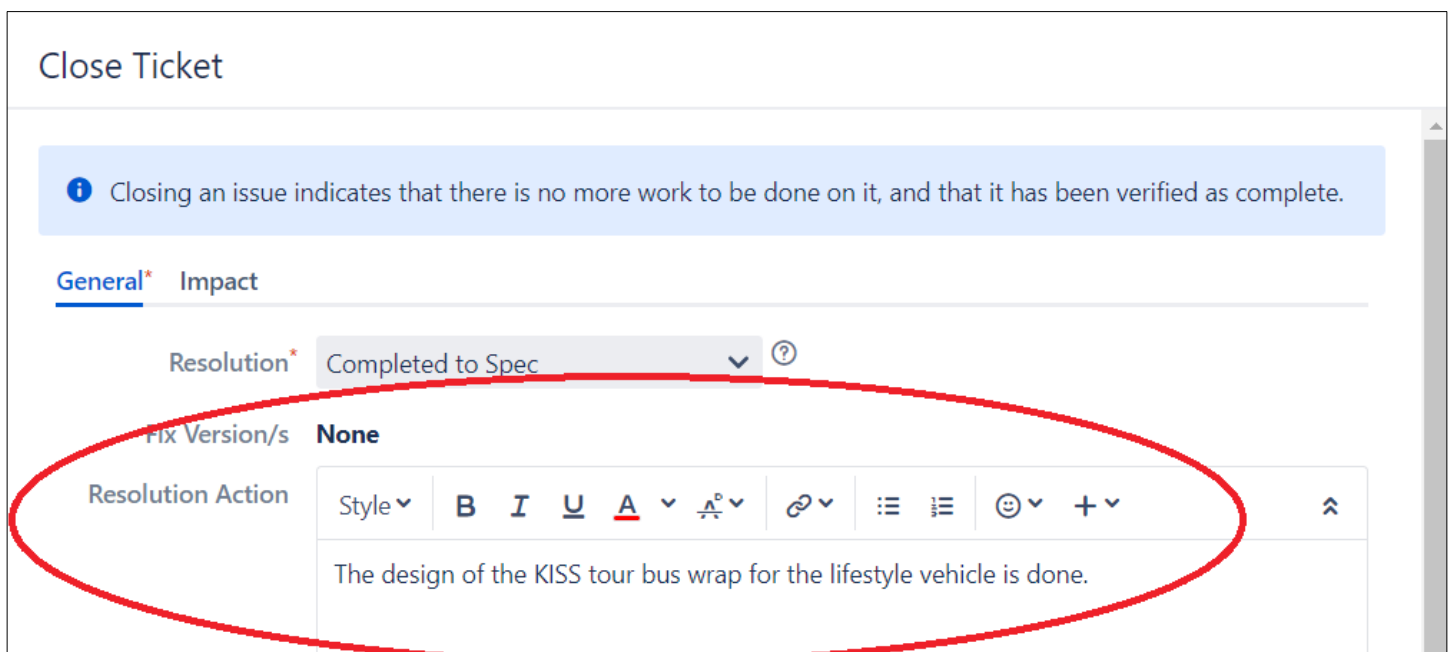
8. When the **Close Ticket** window appears, click in the **Resolution** box.

When the menu appears, click **Completed to Spec**.



9. In the **Resolution action** text box, type:

The design of the KISS tour bus wrap for the lifestyle vehicle is done.



The Status of the issue should now be Closed:


The screenshot shows the JIRA interface for the issue 'Joe Gumbo's Wrap Design' (TESTING-12). The issue is currently in a 'CLOSED' state, which is highlighted with a red oval. The status bar shows 'Status: CLOSED (View Workflow)' and 'Resolution: Completed to Spec'. The 'Details' section includes fields for Type (Story), Priority (P3-Medium), Labels (None), and Resolution Action (The design of the KISS tour bus wrap for the lifestyle vehicle is done.). The 'Description' section contains the text: 'Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.'

11. Click the **Re-Open** button.






The screenshot shows the same JIRA issue 'Joe Gumbo's Wrap Design' (TESTING-12). In this view, the 'Re-Open' button is circled in red, indicating the next step in the process. The status bar still shows 'Status: CLOSED (View Workflow)' and 'Resolution: Completed to Spec'. The 'Details' and 'Description' sections are visible, showing the same information as the previous screenshot.




12. When the **Re-Open** window appears, click the **Re-Open** button.

Re-Open

Assignee  Chris Charuhas

Comment

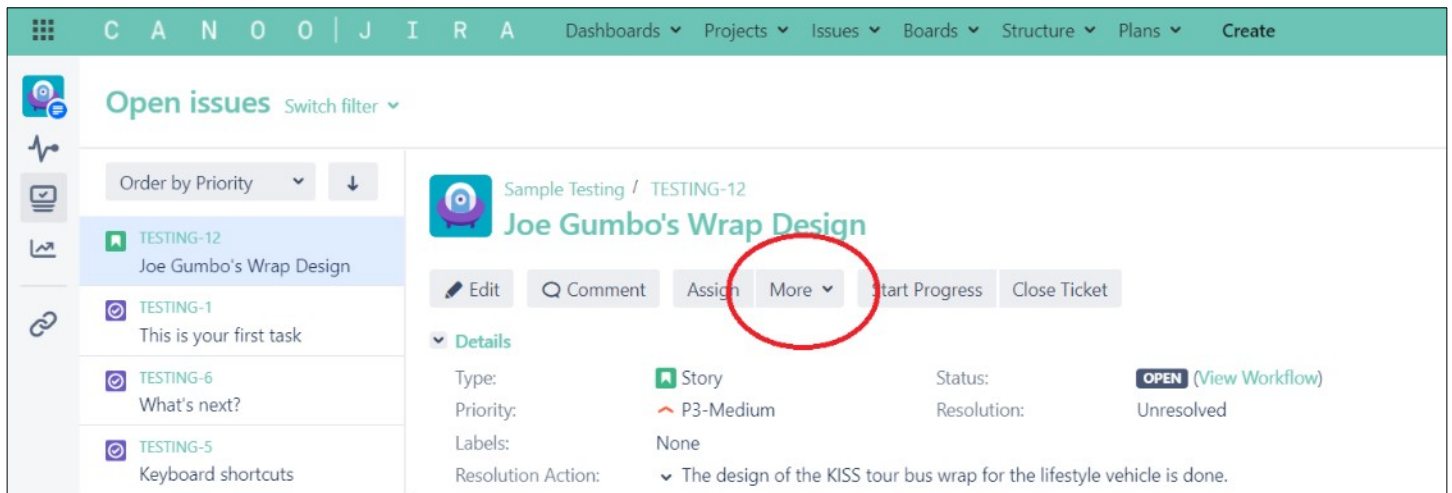
Style **B** *I* U **A** **A**     + 

Visual Text    Viewable by All Users

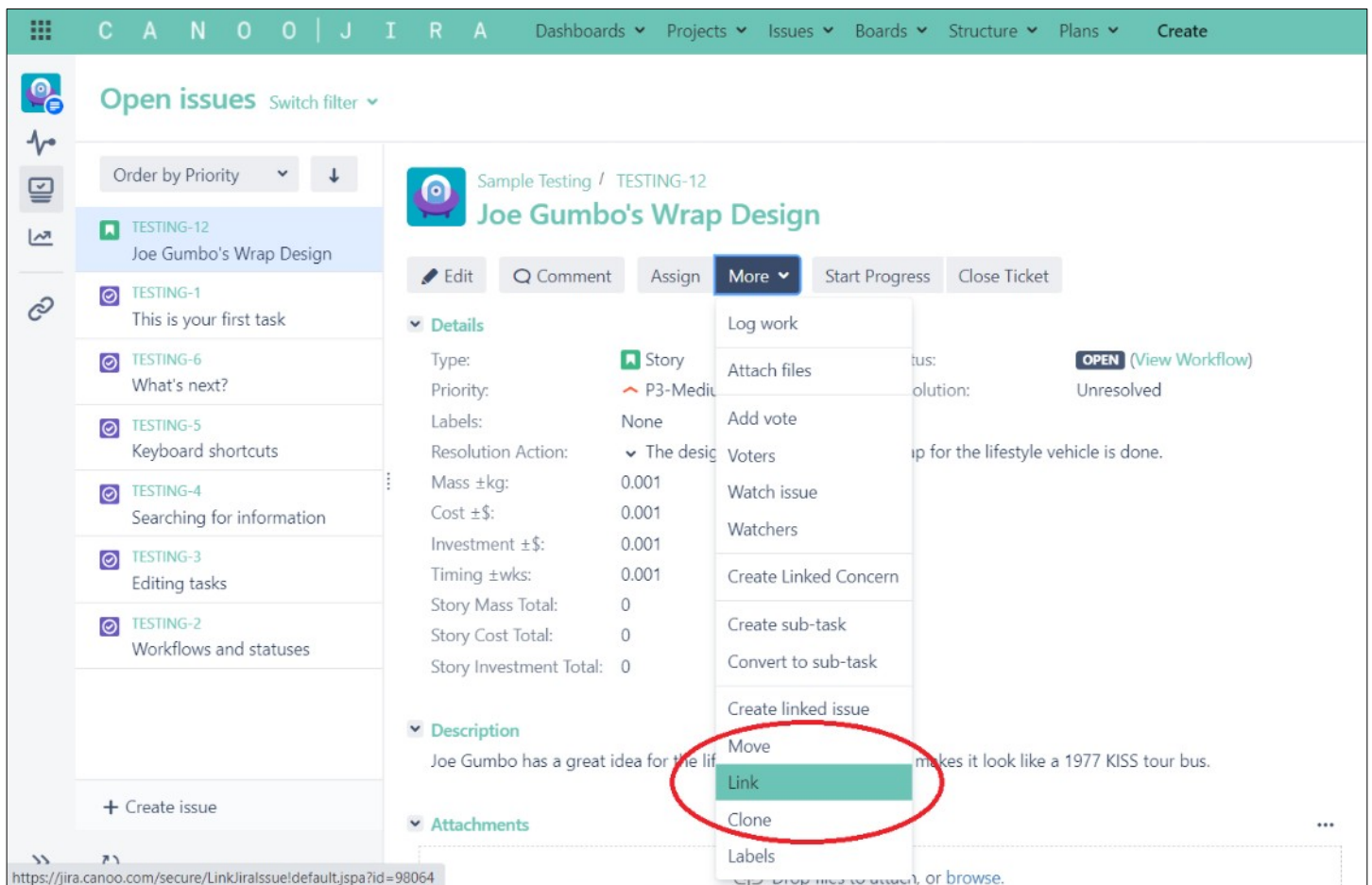
Re-Open Cancel

Link Issues Together

1. In the main issue screen, click the **More** button.



2. When the menu appears, click **Link**.



3. When the **Link** window appears, click the **This issue** box.

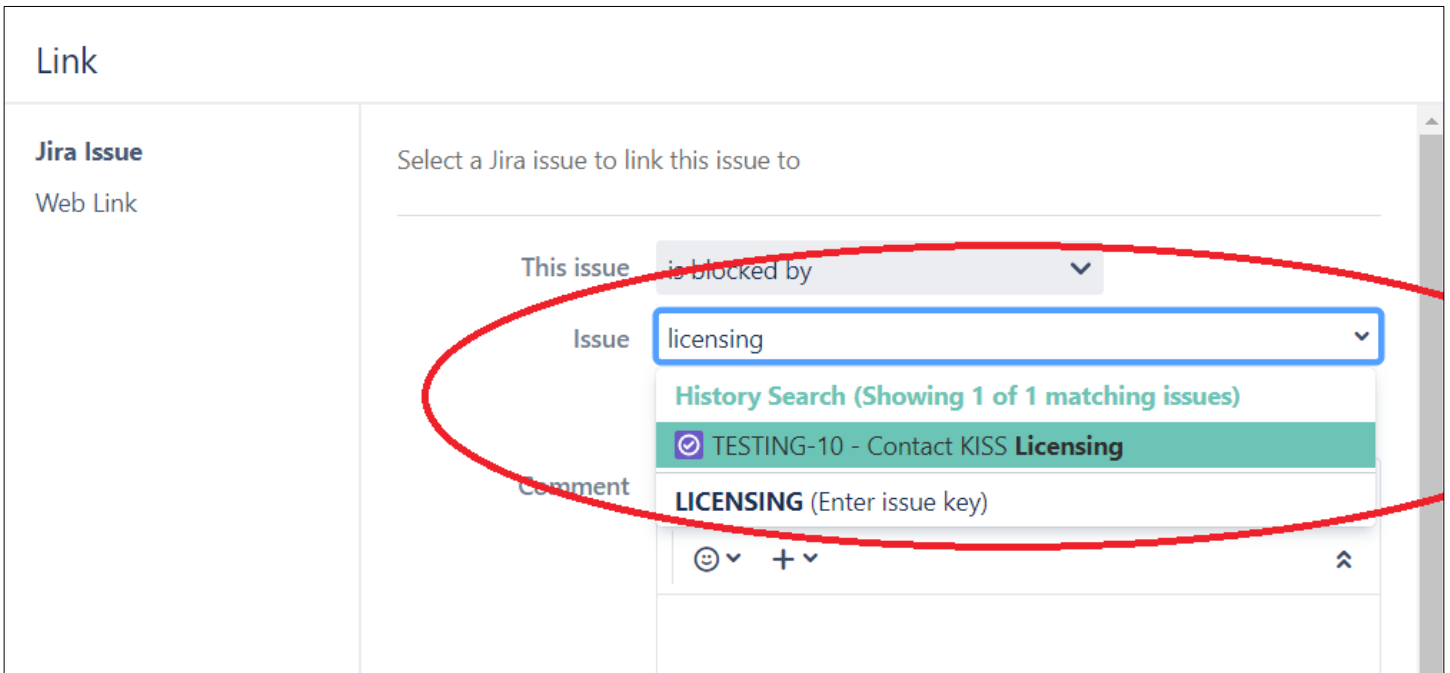
When the menu appears, click **is blocked by**.



4. Click the **Issue** box, then type:

licensing

When the **Contact KISS Licensing** issue appears in the menu, click it.



5. Click the **Link** button.

Link

Jira Issue
Web Link

Select a Jira issue to link this issue to

This issue is blocked by

Issue

or [search for an issue](#)
Begin typing to find recently viewed issues

Comment

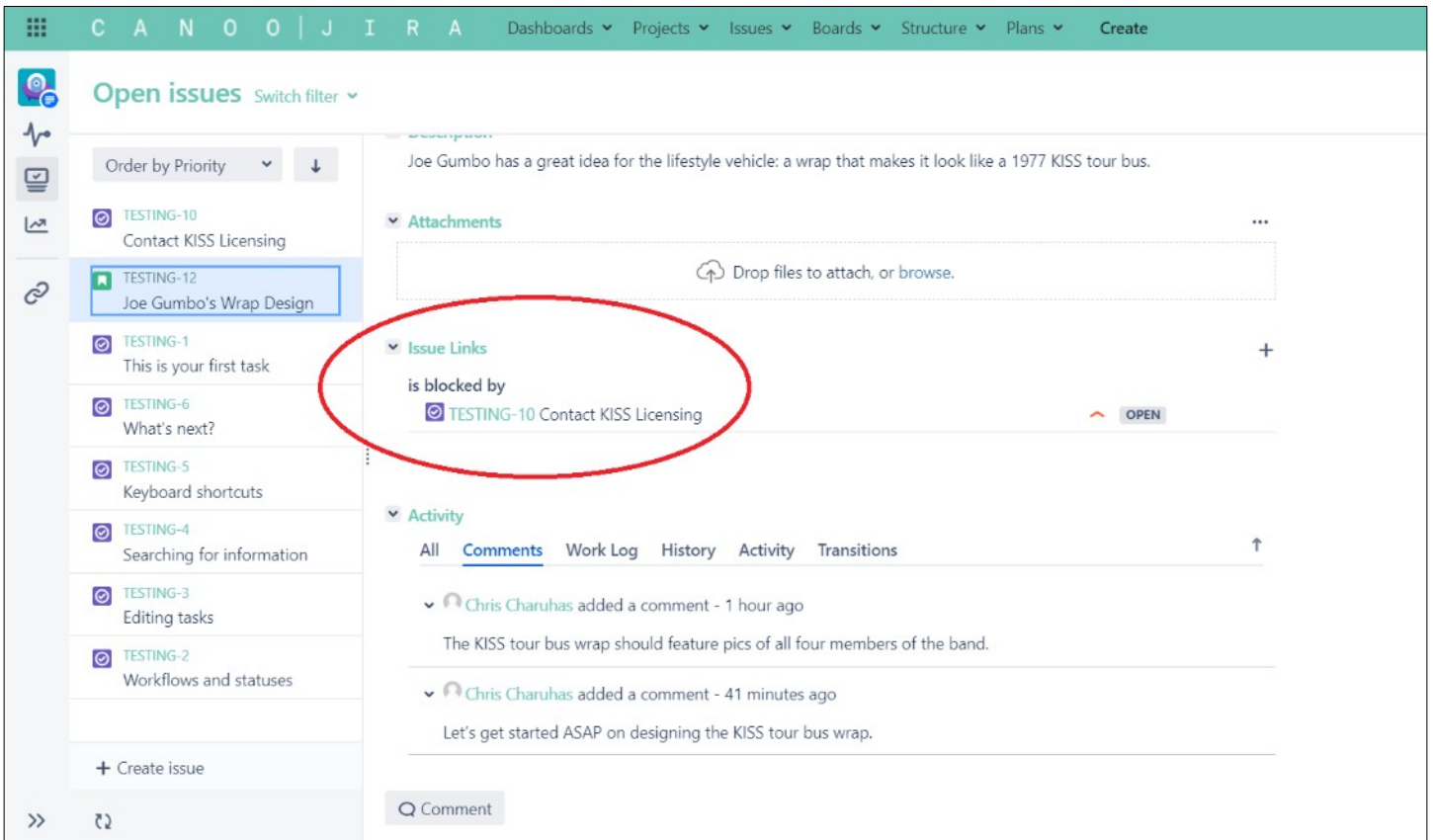
Style **B** *I* U A

Visual Text Viewable by All Users

6. Scroll down to the bottom of the main issue screen.

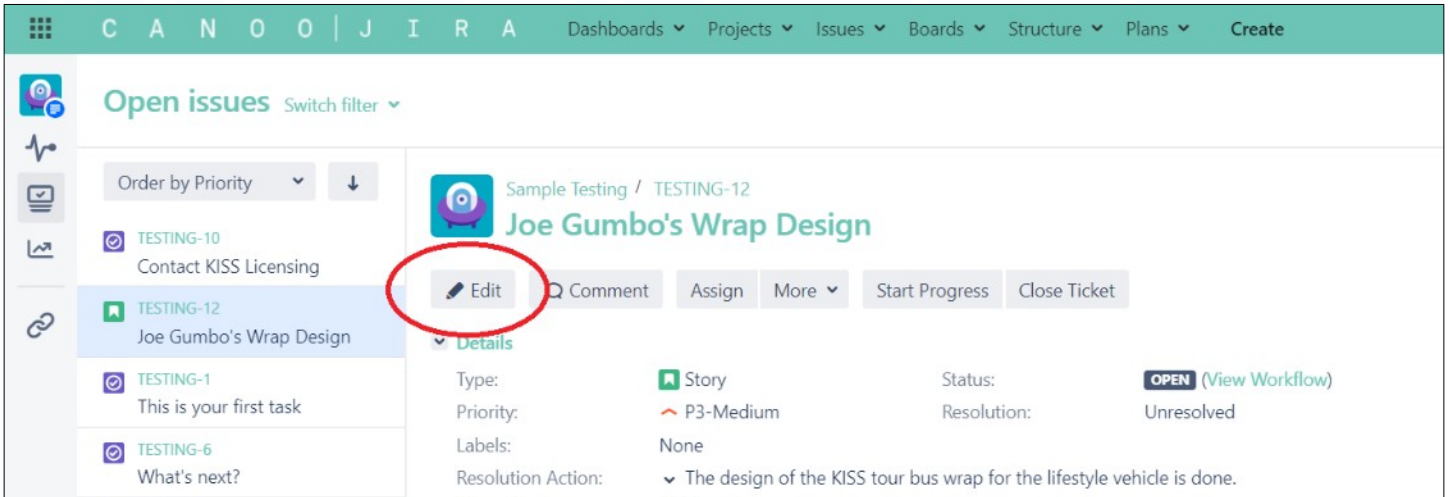
In the **Issue Links** section, it should read:

is blocked by
TESTING-10 Contact KISS Licensing

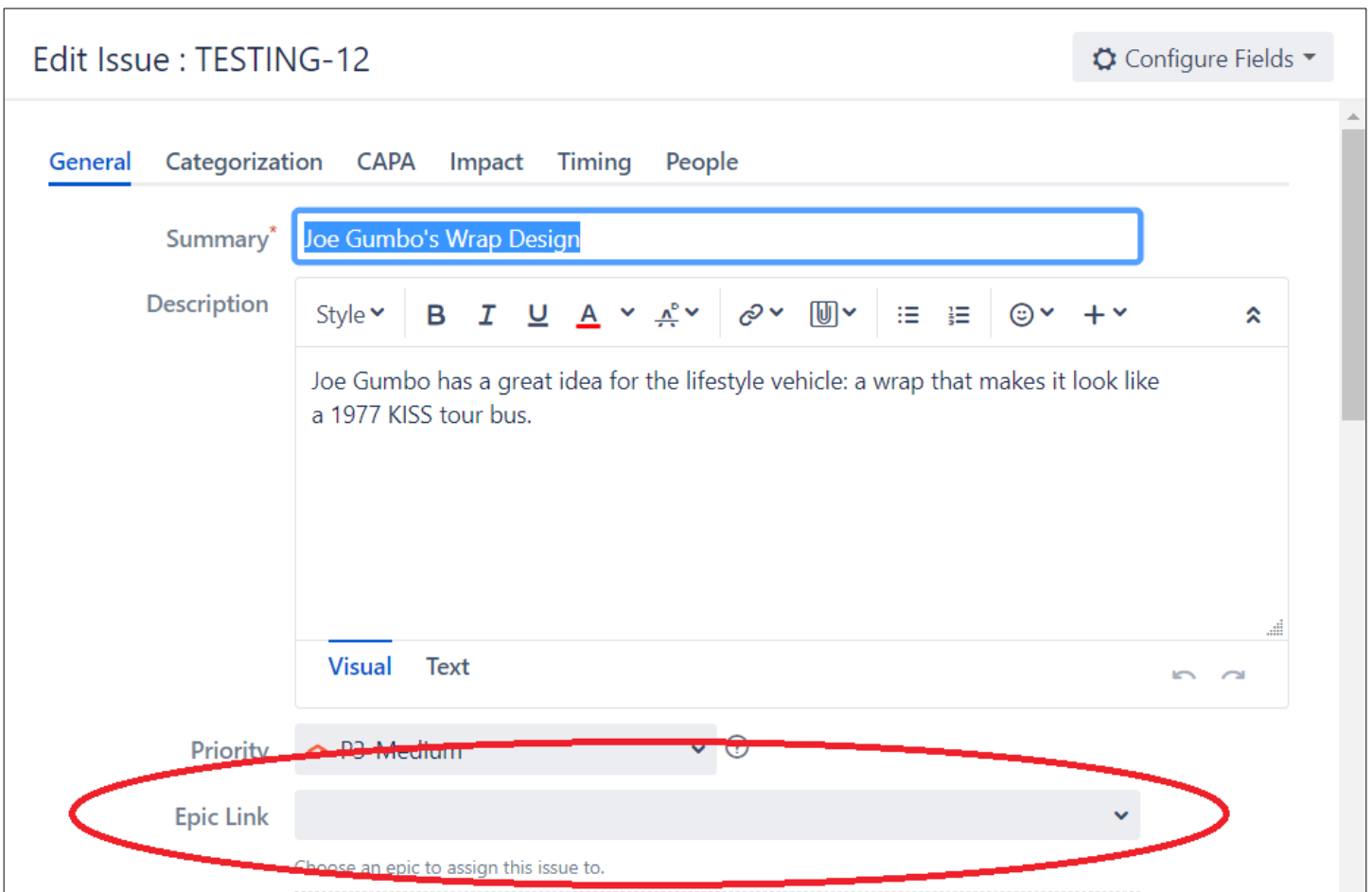


Link to an Epic

1. In the main issue screen, click the **Edit** button.



2. When the **Edit Issue** window appears, click the **Epic Link** box.



3. In the box, type:

Create Wrap Designs

When **Create Wrap Designs** appears in the menu, click it.

The screenshot shows the 'Edit Issue : TESTING-12' interface. At the top right, there is a 'Configure Fields' button. Below the title, there are tabs for 'General', 'Categorization', 'CAPA', 'Impact', 'Timing', and 'People'. The 'General' tab is active. The 'Summary' field contains 'Joe Gumbo's Wrap Design'. The 'Description' field has a rich text editor with the text 'Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.' Below the description, there are 'Visual' and 'Text' modes. The 'Priority' is set to 'P3-Medium'. The 'Epic Link' dropdown menu is open, showing 'Create Wrap Designs' as the selected option. Below the dropdown, there is a section for 'Attachments' with a 'Suggestions' list containing 'Create Wrap Designs - (TESTING-13)'. At the bottom right, there are 'Update' and 'Cancel' buttons.

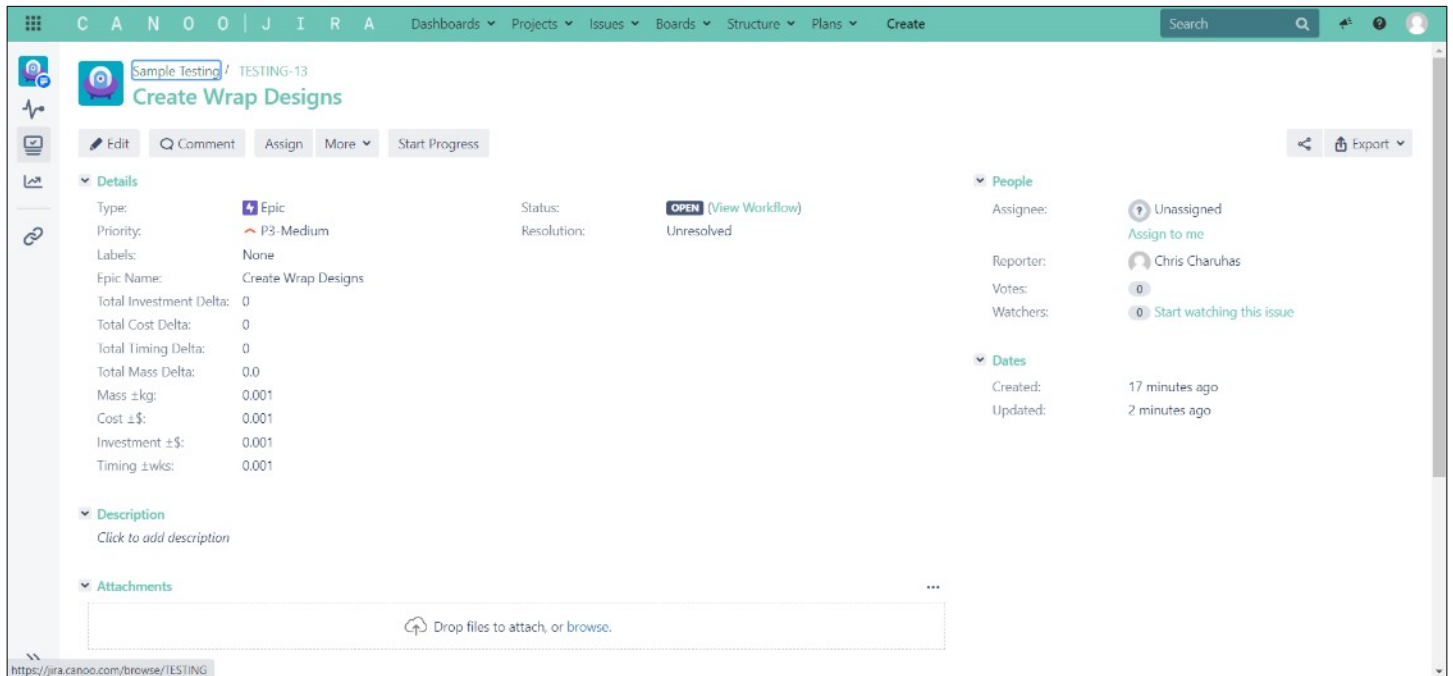
In the **Details** section, **Create Wrap Designs** should now be listed as the Epic Link:

The screenshot shows the JIRA interface for an issue titled "Joe Gumbo's Wrap Design" (TESTING-12). The left sidebar lists several other issues, with "TESTING-12" selected. The main content area displays the issue details. A red circle highlights the "Epic Link" field, which is set to "Create Wrap Designs". Other details include: Type: Story, Priority: P3-Medium, Status: OPEN (View Workflow), Resolution: Unresolved, and a Resolution Action: "The design of the KISS tour bus wrap for the lifestyle vehicle is done." The description at the bottom states: "Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus."

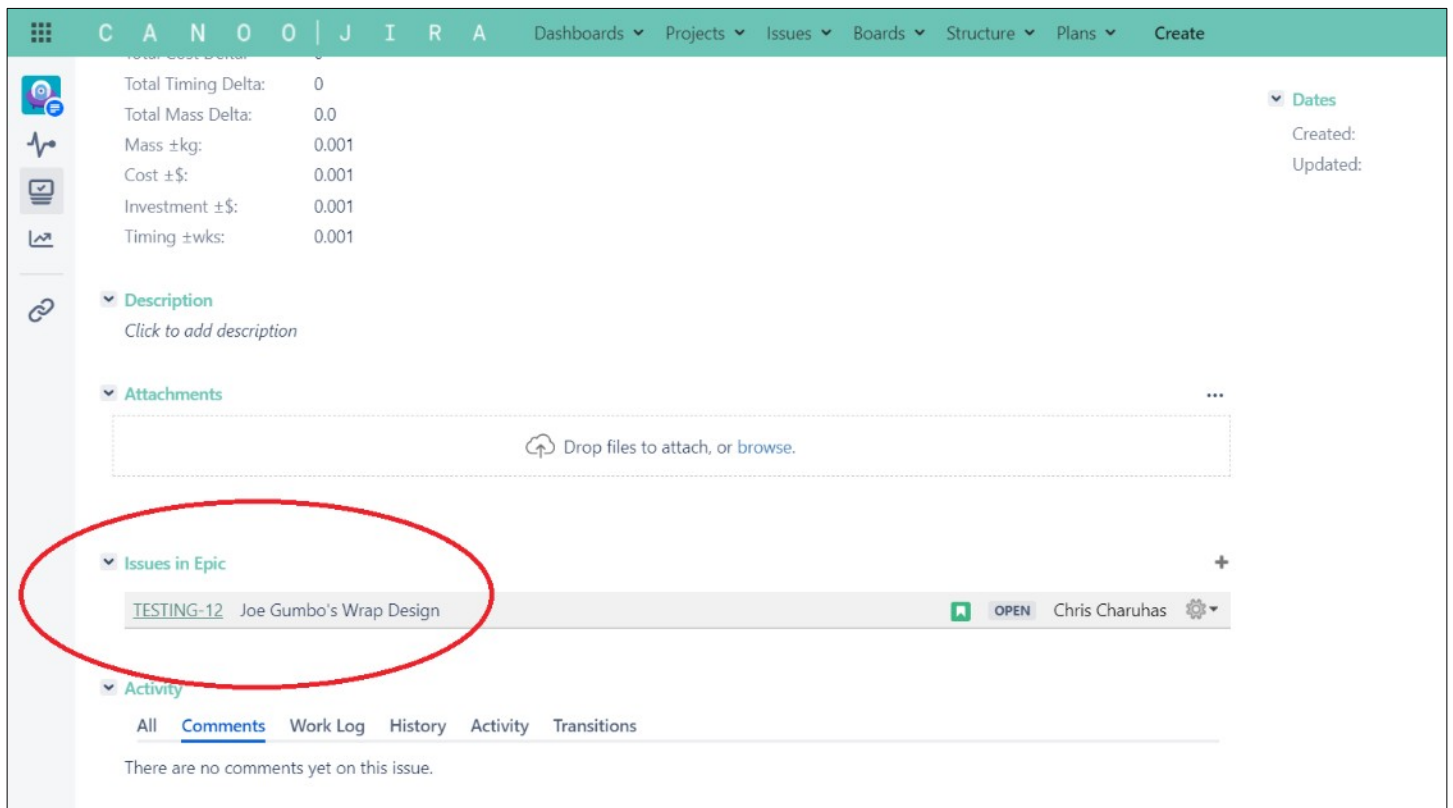
5. Click the link to the **Create Wrap Designs** epic.

This screenshot is identical to the one above, showing the JIRA issue details for "Joe Gumbo's Wrap Design". A red circle highlights the "Epic Link" field, which is set to "Create Wrap Designs". The interface elements, including the sidebar, issue title, and details section, are the same as in the previous image.

It will take you to the epic:



6. Scroll down to the **Issues in Epic** section, then click the **[Your Name]’s Wrap Design** link.



It should take you back to the [Your Name]'s Wrap Design issue.

The screenshot shows a Jira issue page for 'Joe Gumbo's Wrap Design' (Issue ID: TESTING-12). The page is titled 'Sample Testing / TESTING-12' and 'Joe Gumbo's Wrap Design'. The issue is a Story with a priority of P3-Medium and a status of OPEN. The resolution is Unresolved. The description states: 'Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.' The page includes sections for Details, Description, and Attachments. The Attachments section is currently empty, with a prompt to 'Drop files to attach, or browse.' The page also shows the Assignee (Chris Charuhas), Reporter (Chris Charuhas), and Design Responsible (Chris Charuhas). The issue was created 2 hours ago and updated 5 minutes ago.

Sample Testing / TESTING-12
Joe Gumbo's Wrap Design

Edit Comment Assign More Start Progress Close Ticket

Details

Type: Story Status: OPEN (View Workflow)
Priority: P3-Medium Resolution: Unresolved
Labels: None
Epic Link: Create Wrap Designs
Resolution Action: The design of the KISS tour bus wrap for the lifestyle vehicle is done.
Mass \pm kg: 0.001
Cost \pm \$: 0.001
Investment \pm \$: 0.001
Timing \pm wks: 0.001
Story Mass Total: 0
Story Cost Total: 0
Story Investment Total: 0

Description

Joe Gumbo has a great idea for the lifestyle vehicle: a wrap that makes it look like a 1977 KISS tour bus.

Attachments

Drop files to attach, or browse.

People

Assignee: Chris Charuhas
Reporter: Chris Charuhas
Design Responsible: Chris Charuhas
Engineer:
Votes: 0
Watchers: Start watching this issue

Dates

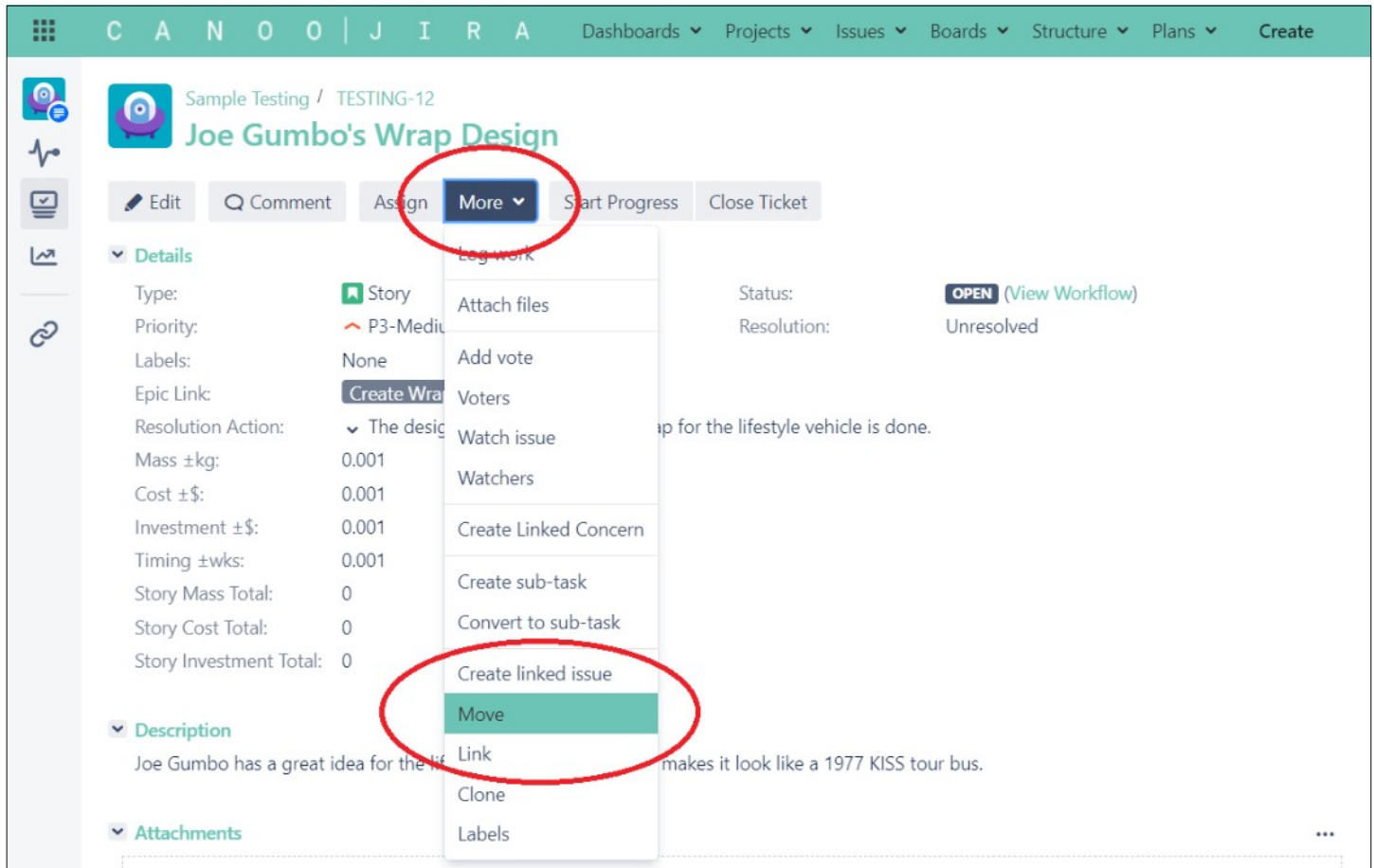
Created: 2 hours ago
Updated: 5 minutes ago

https://jira.canoo.com/browse/TESTING

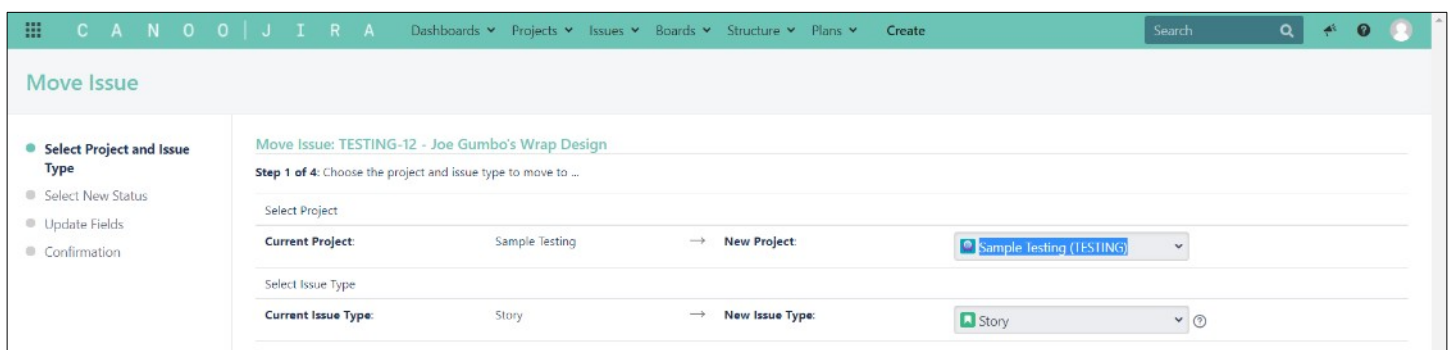
Migrate an Issue

1. In the main issue screen for the [Your Name]'s **Wrap Design** issue, click the **More** button.

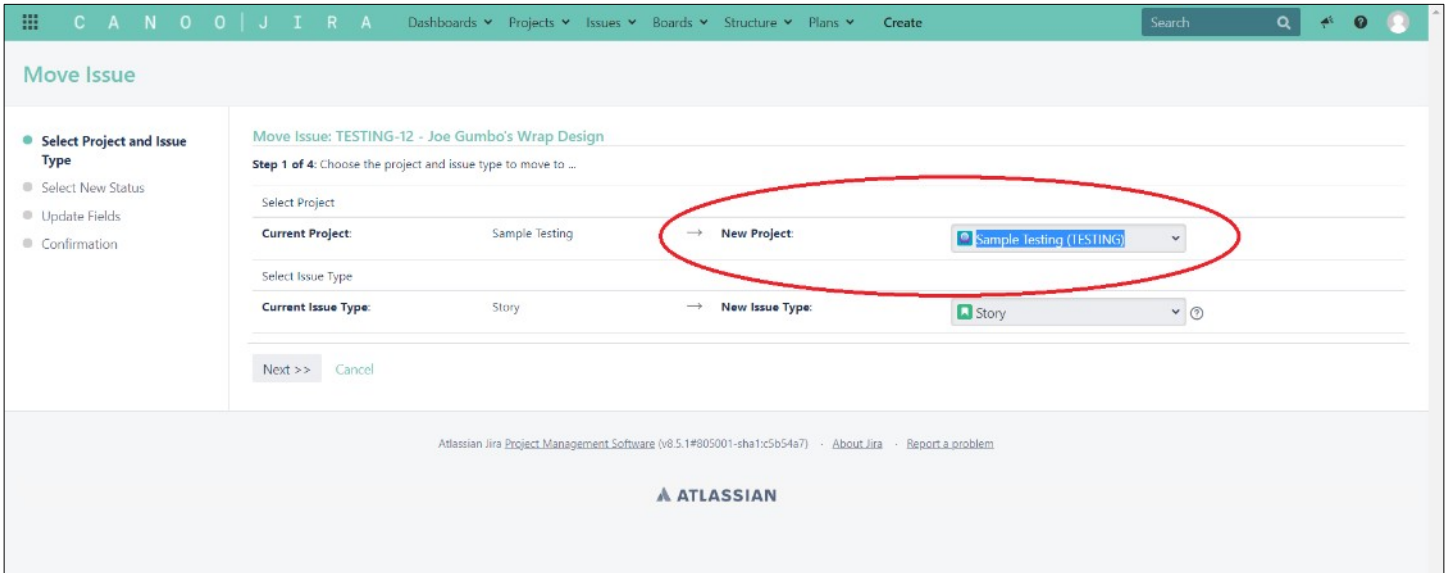
When the menu appears, click **Move**.



The **Move Issue** screen should appear:

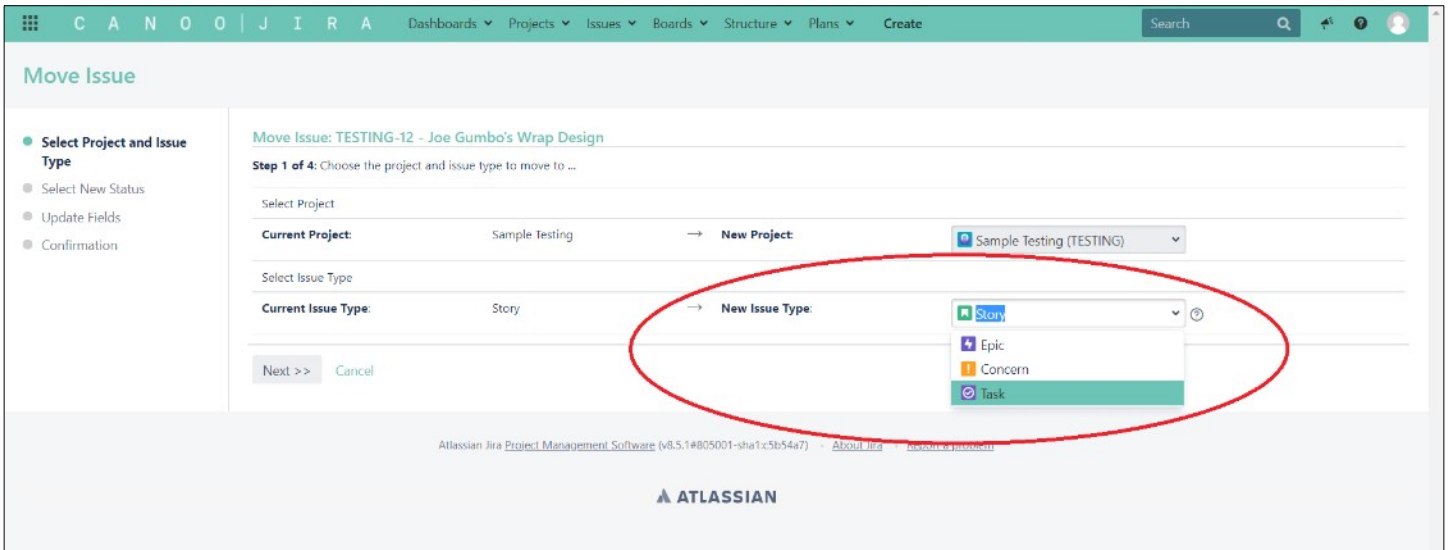


Here, in the **Select Project** area, you can move an issue to a different project.

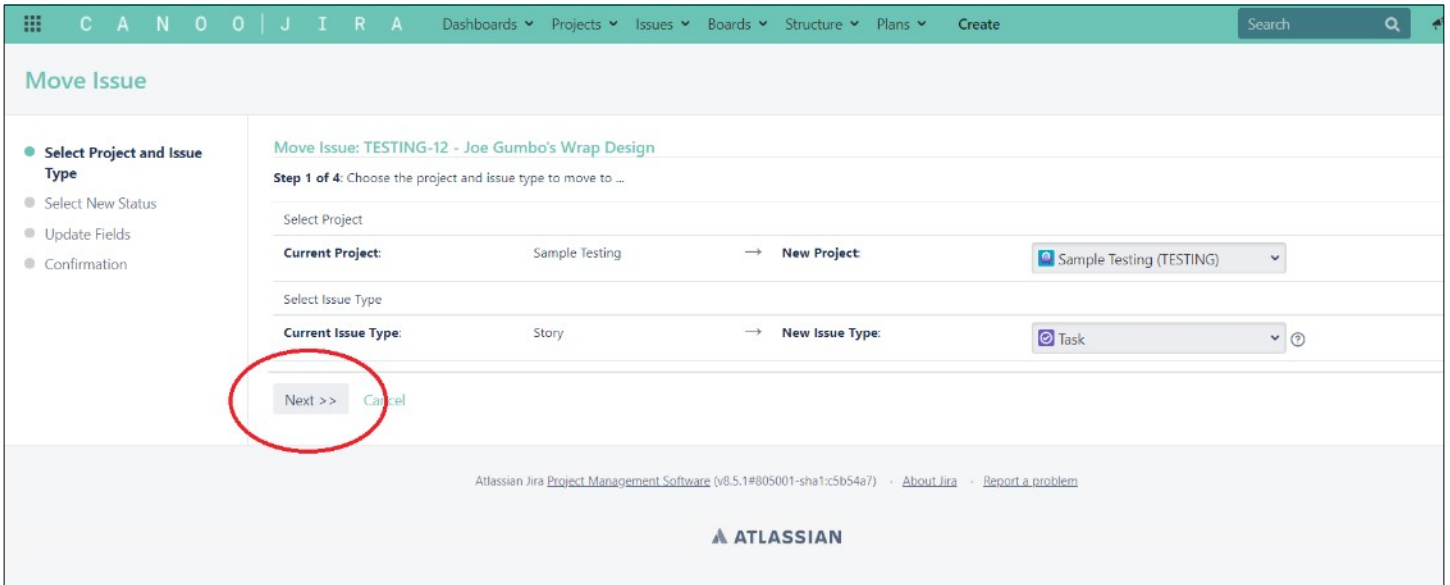


2. In the **Select Issue Type** area, click the **New Issue Type** box.

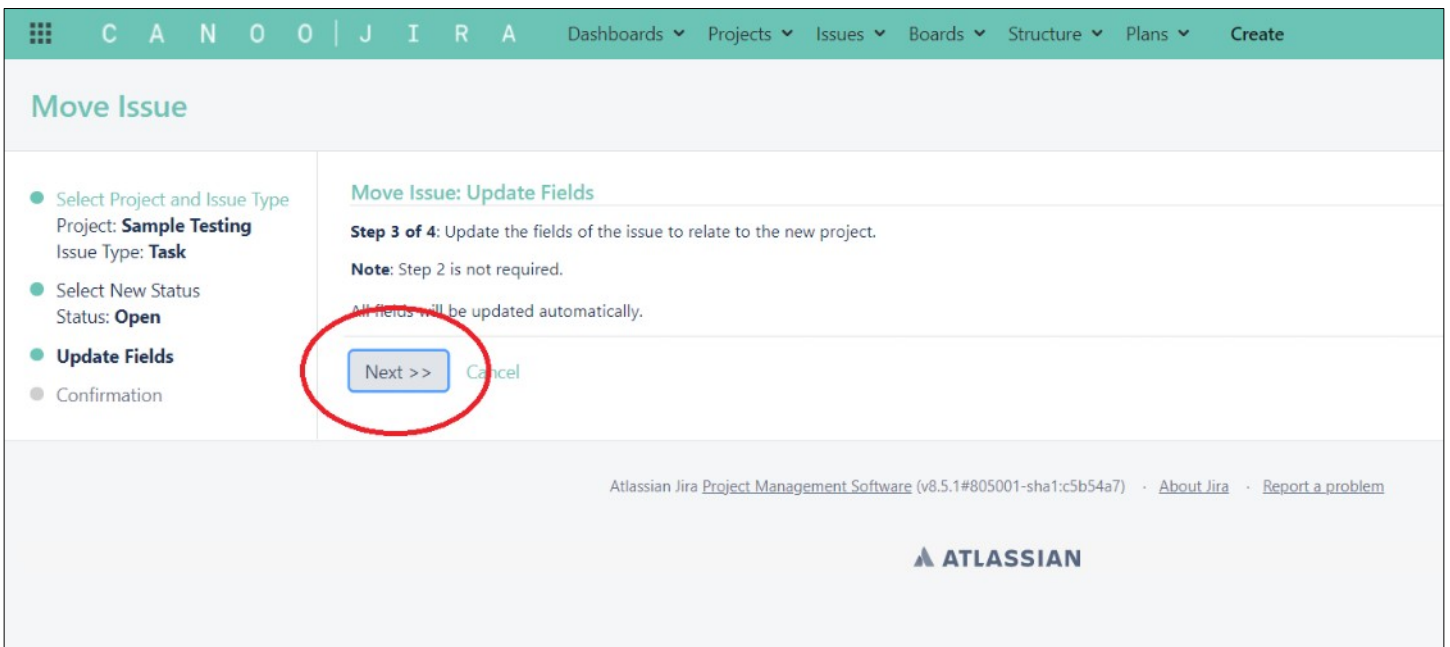
When the menu appears, click **Task**.



3. Click the **Next** button.



4. Under **Move Issue: Update Fields**, leave everything as-is, then click the **Next** button.



5. Under **Move Issue: Confirm**, click the **Cancel** link.

Move Issue

- Select Project and Issue Type
Project: **Sample Testing**
Issue Type: **Task**
- Select New Status
Status: **Open**
- 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	Sample Testing	Sample Testing
Type	Story	Task

Move **Cancel**

Atlassian Jira Project Management Software (v8.5.1#805001-sha1:c5b54a7) · [About Jira](#) · [Report a problem](#)

ATLASSIAN

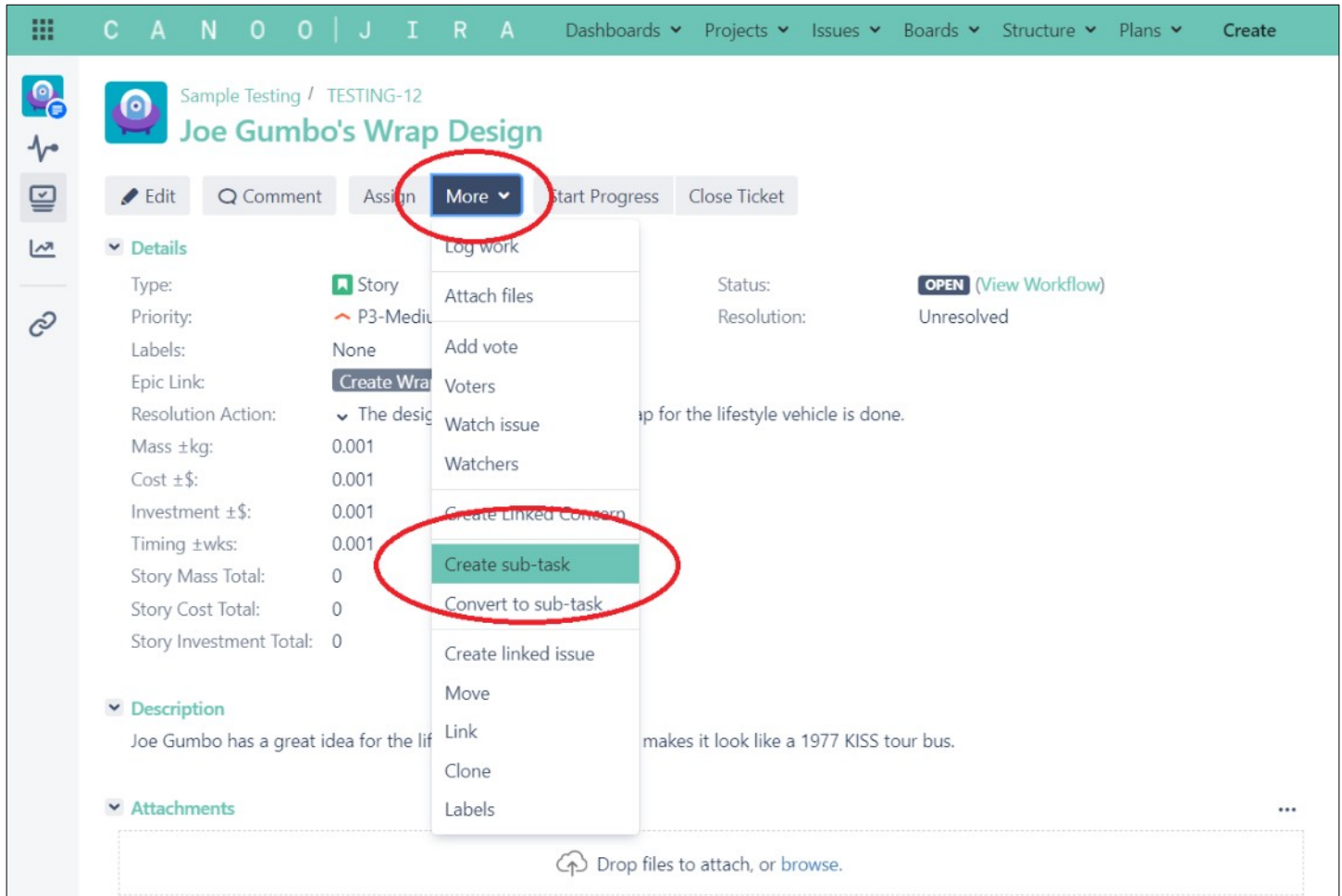
To migrate the issue, you would have clicked the **Move** button.

Create a Subtask

Note: When a small portion of a story, concern, or task needs to be assigned to someone to complete, a subtask is created.

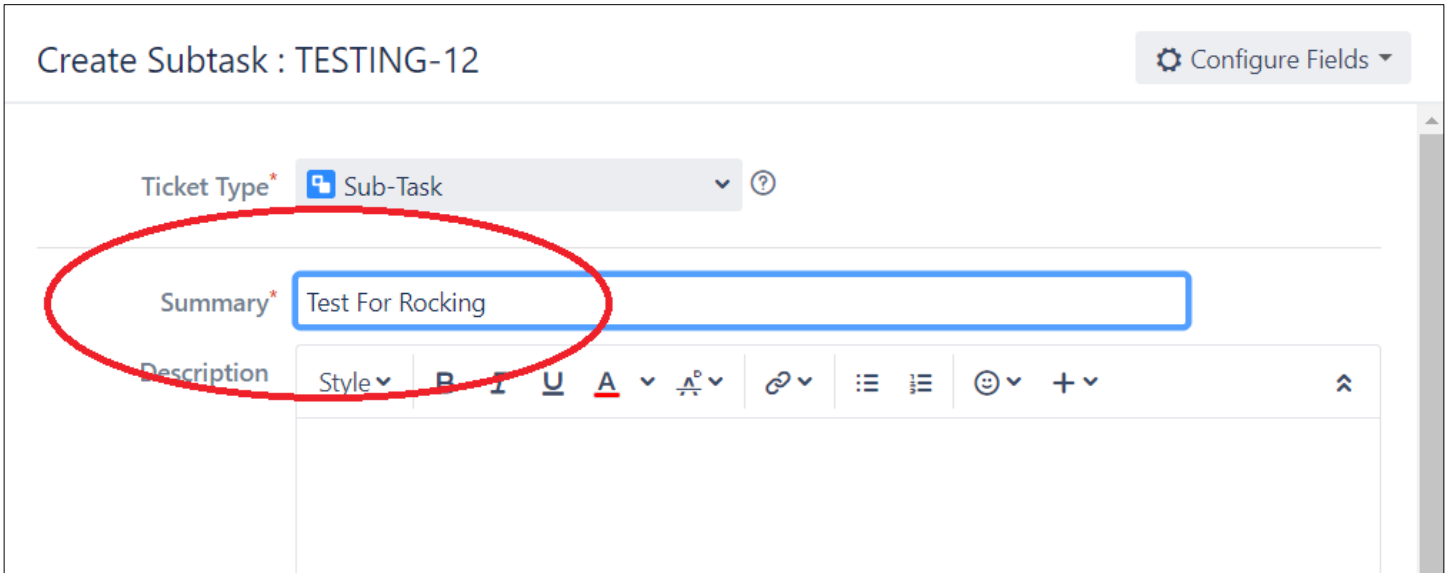
1. In the main screen for the **[Your Name]'s Wrap Design** issue, click the **More** button.

When the menu appears, click **Create sub-task**.



2. When the **Create Subtask** window appears, click in the **Summary** box, then type:

Test For Rocking



Create Subtask : TESTING-12 Configure Fields

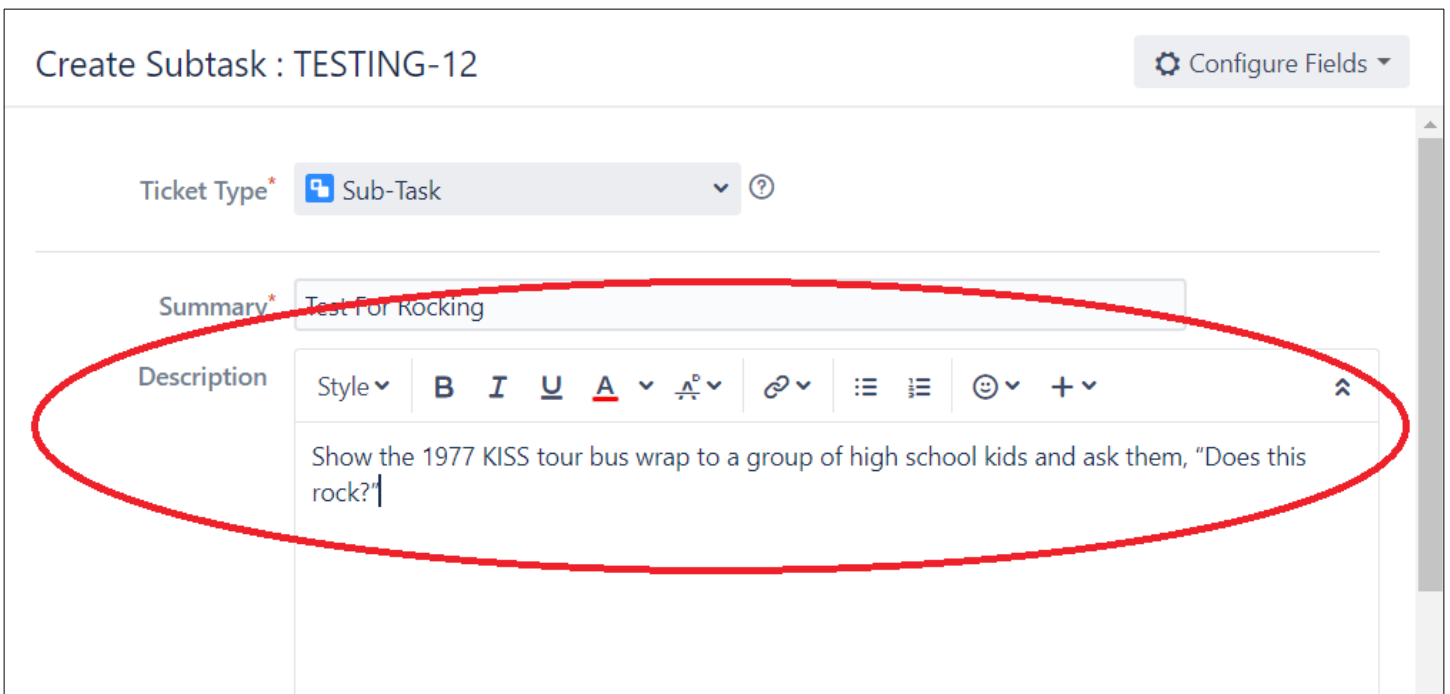
Ticket Type* Sub-Task

Summary* Test For Rocking

Description Style B I U A Color Link List Emoji +

3. In the **Description** text box, type:

Show the 1977 KISS tour bus wrap to a group of high school kids and ask them, “Does this rock?”



Create Subtask : TESTING-12 Configure Fields

Ticket Type* Sub-Task

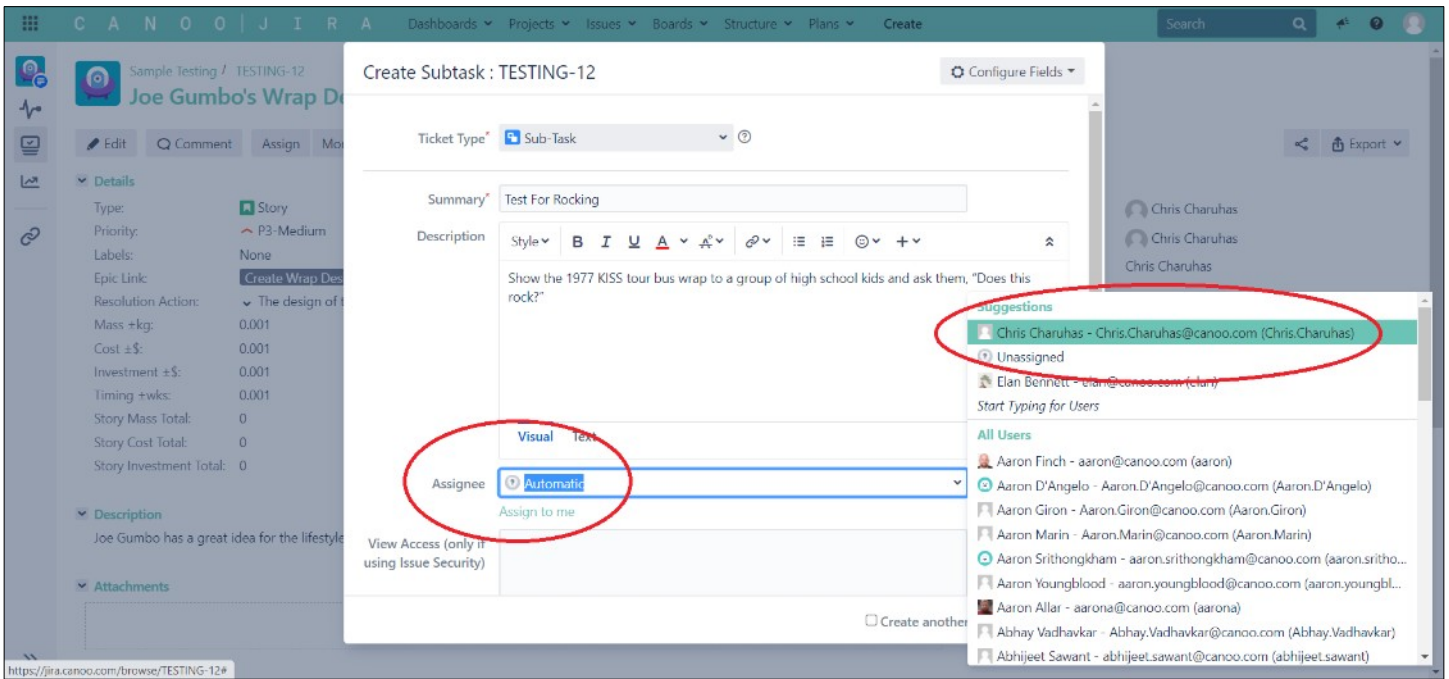
Summary* Test For Rocking

Description Style B I U A Color Link List Emoji +

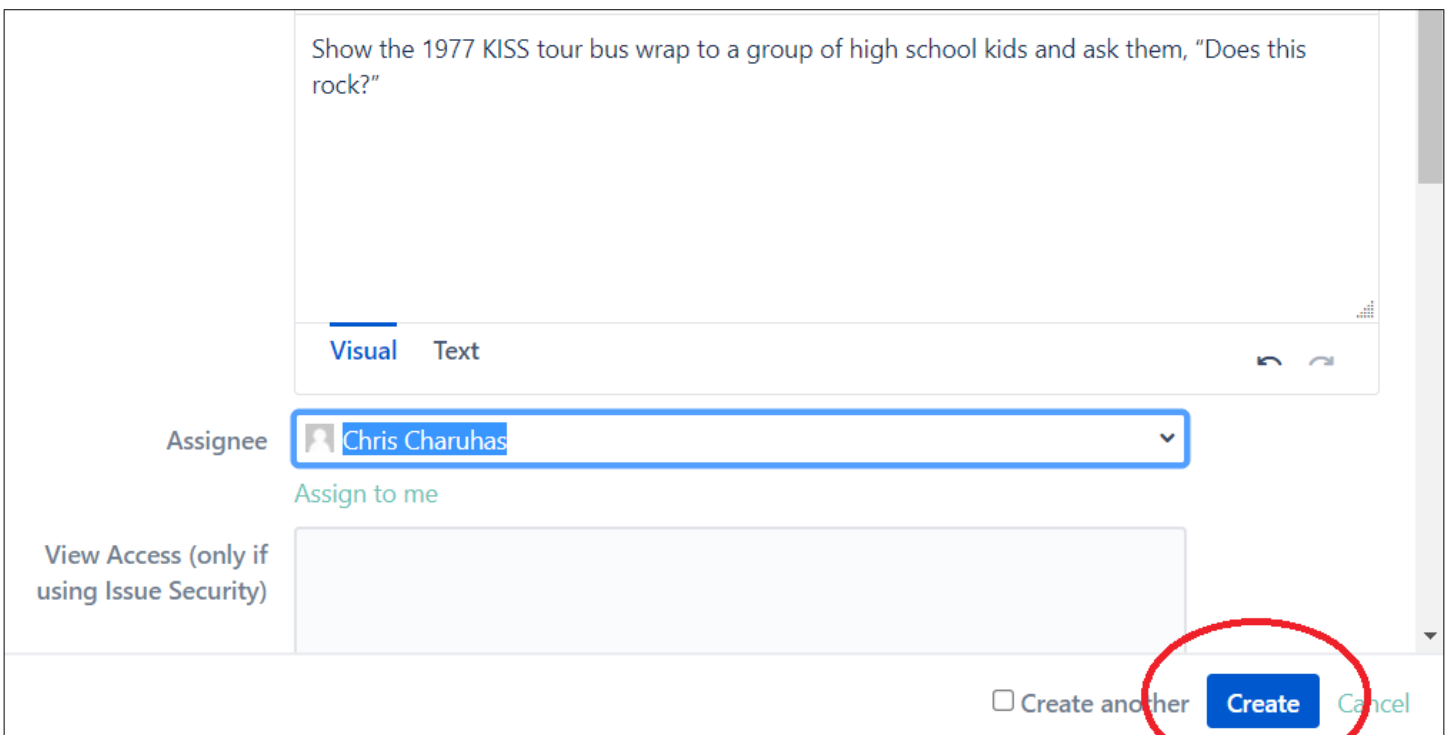
Show the 1977 KISS tour bus wrap to a group of high school kids and ask them, “Does this rock?”

4. Click the Assignee box.

When the menu appears, click your name.

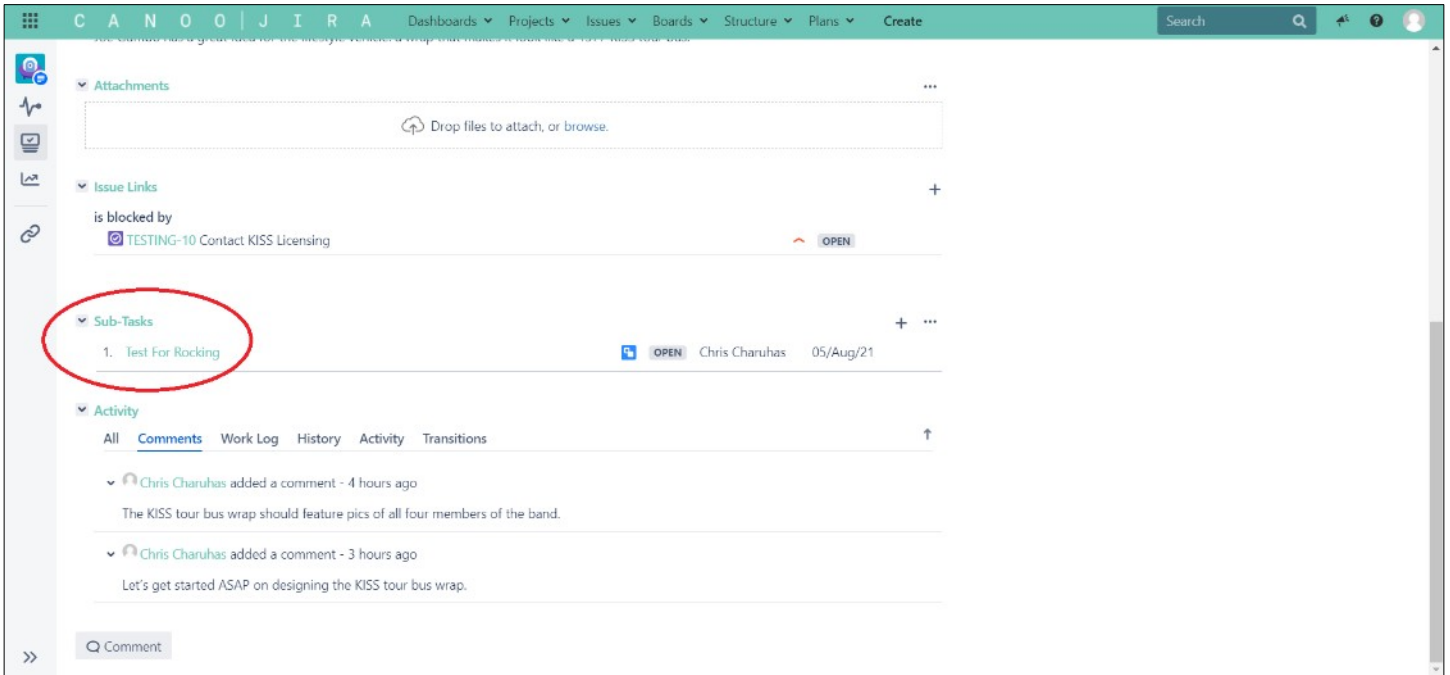


5. Click the Create button.



6. Scroll down in the main issue screen to the **Sub-Tasks** section.

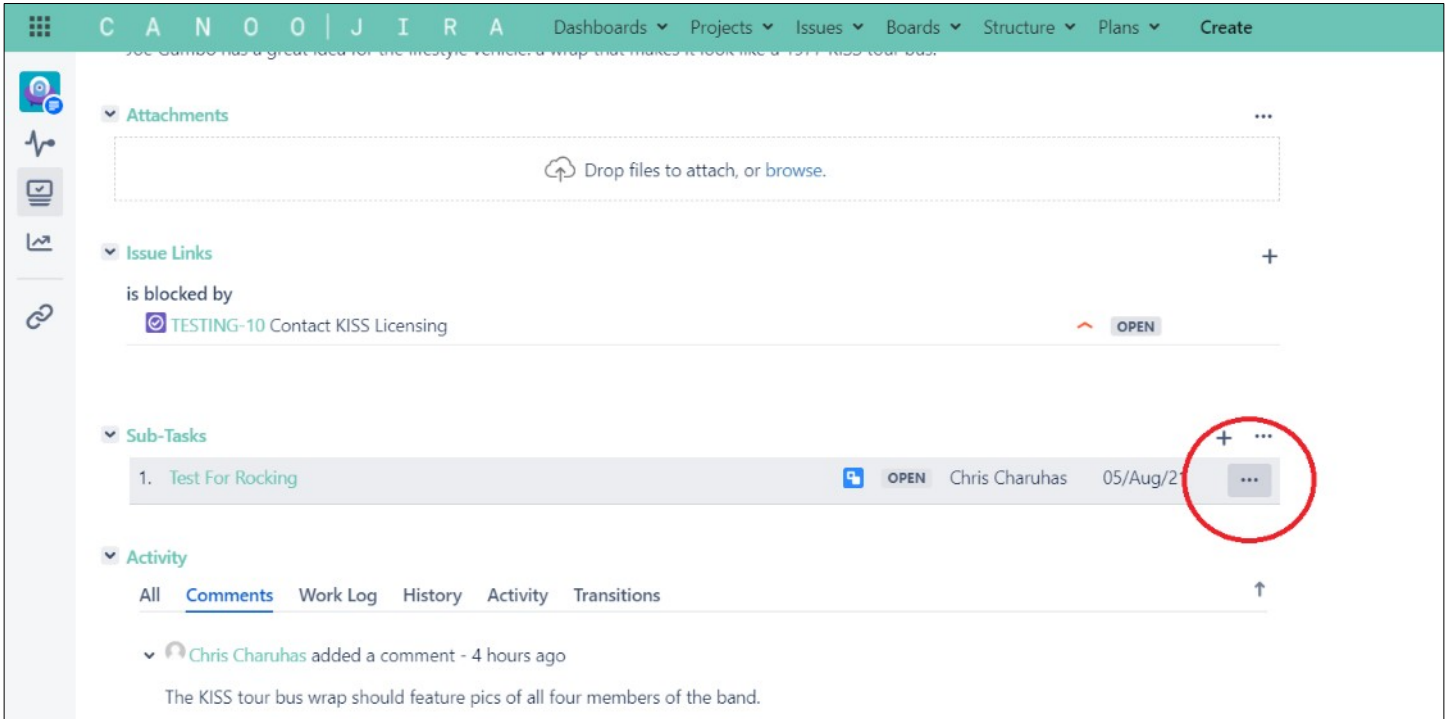
The new subtask should be listed:



Complete a Subtask

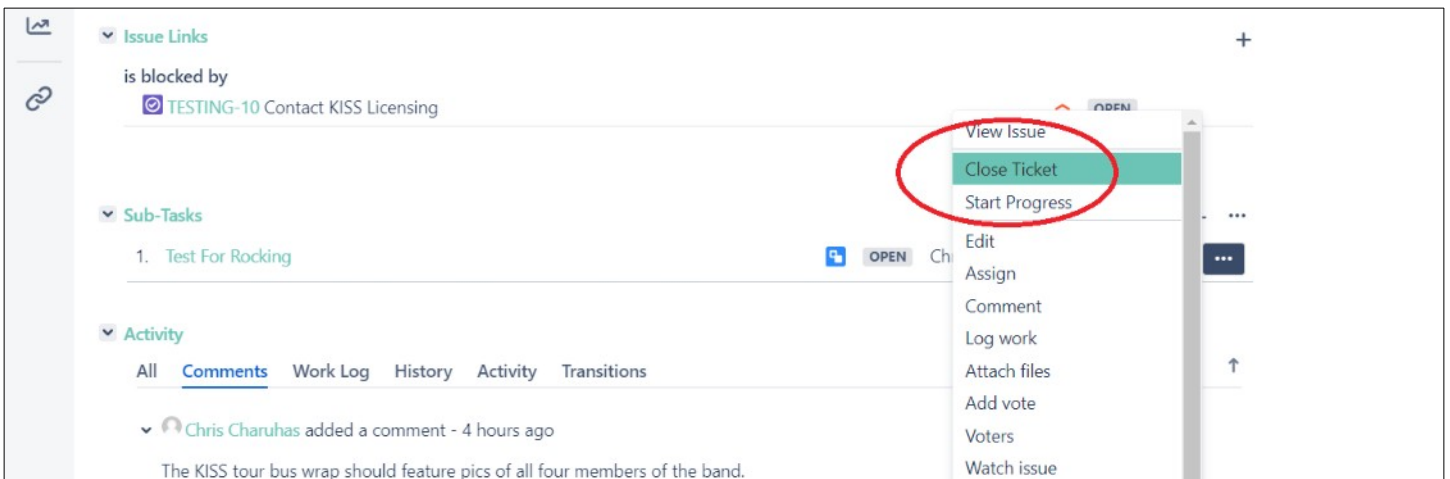
1. Hover the mouse cursor over the subtask.

Three dots should appear at the end.



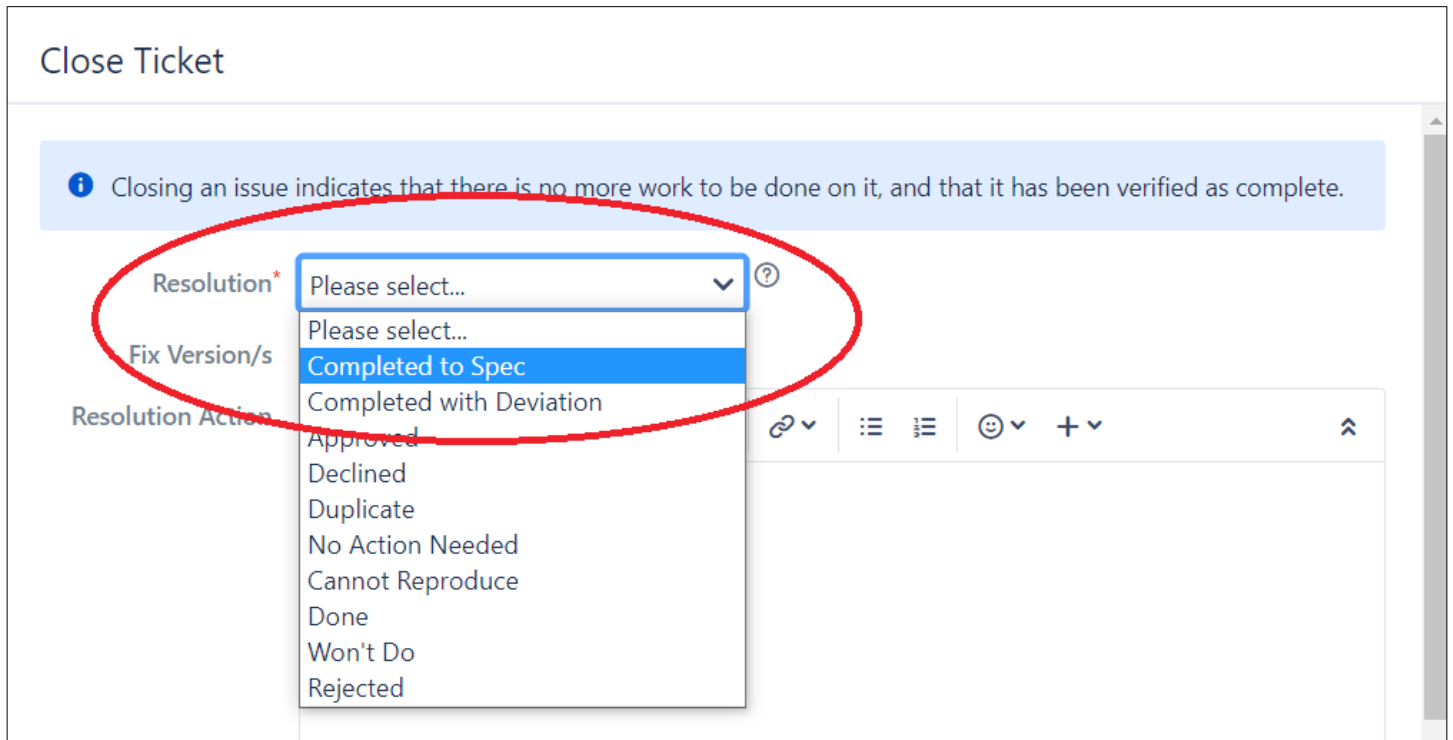
2. Click the three dots.

When the menu appears, click **Close Ticket**.

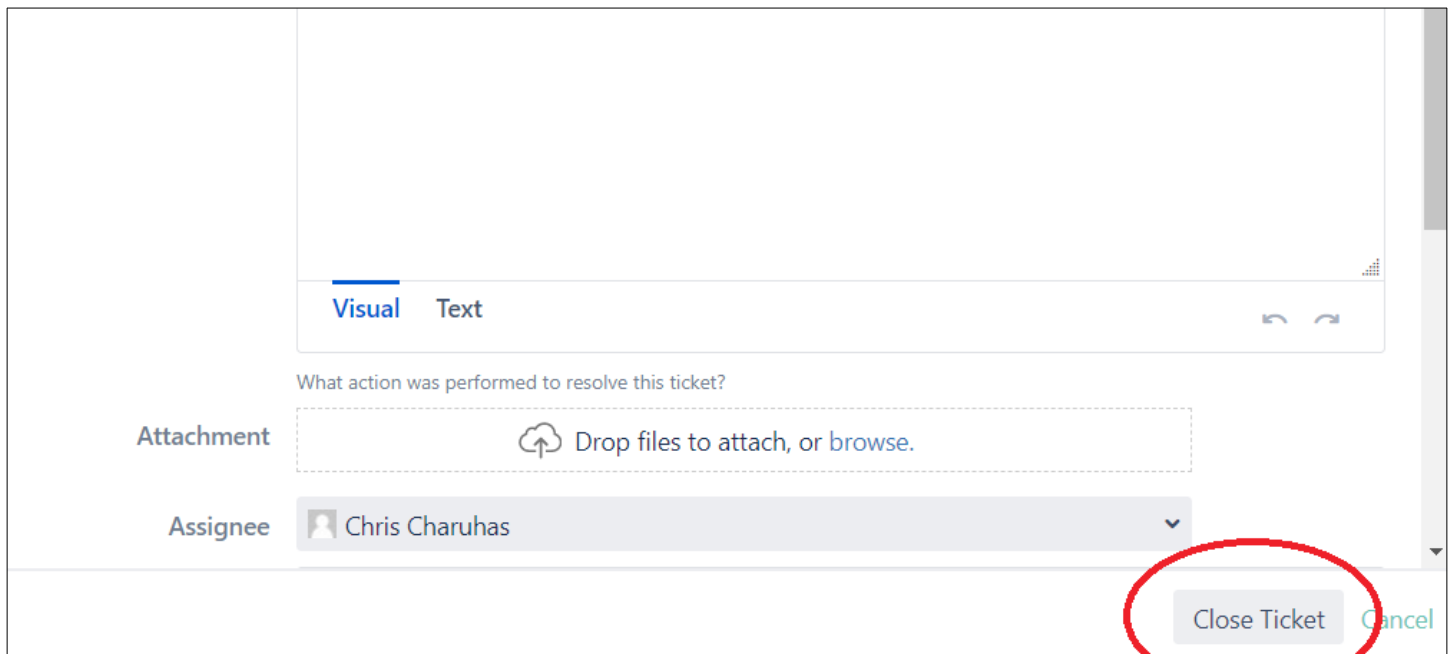


3. When the **Close Ticket** window appears, click the **Resolution** box.

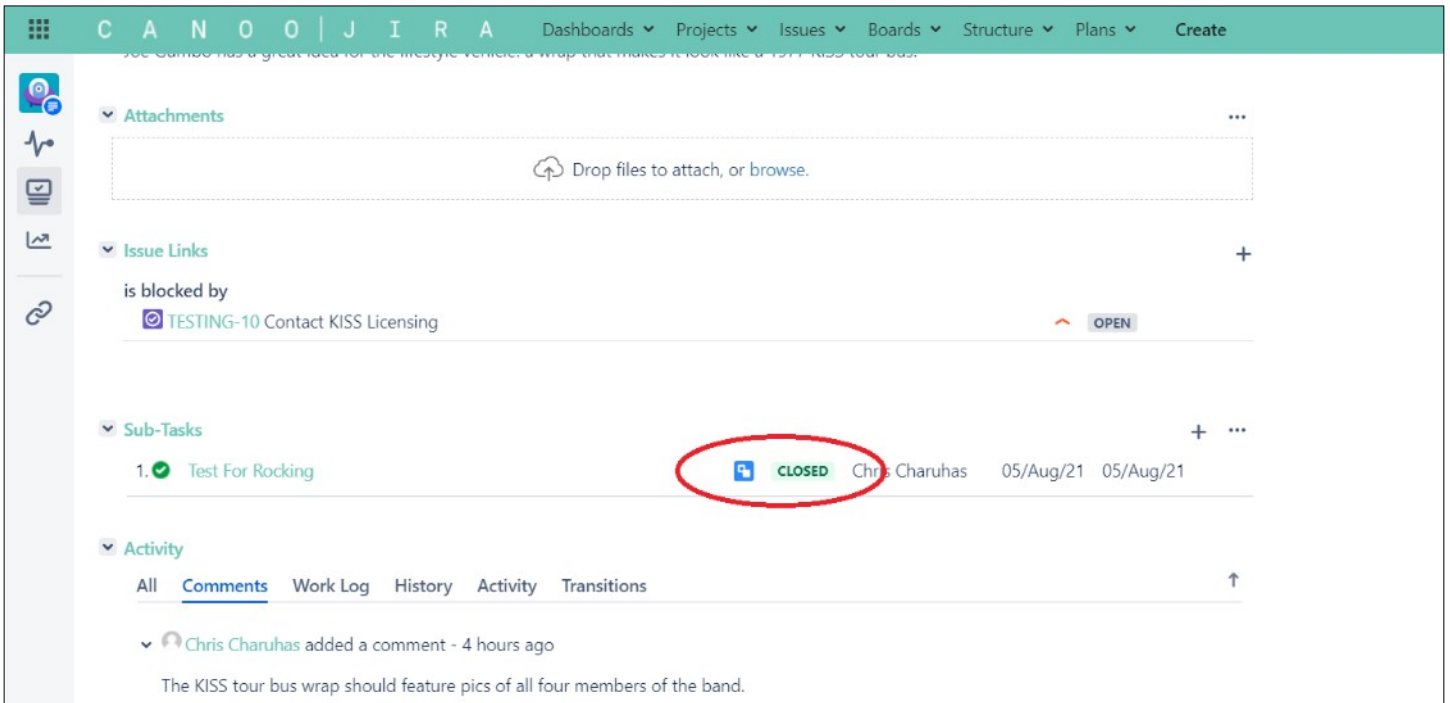
When the menu appears, click **Completed to Spec**.



4. Click the **Close Ticket** button.



In the **[Your Name]'s Wrap Design** issue, its **Test For Rocking** subtask should be marked as closed:



Tip: Some issues require all of the subtasks within them to be completed before the issue can be closed.

CONDUCT & MANAGE SEARCHES

In this section, you'll learn how to:

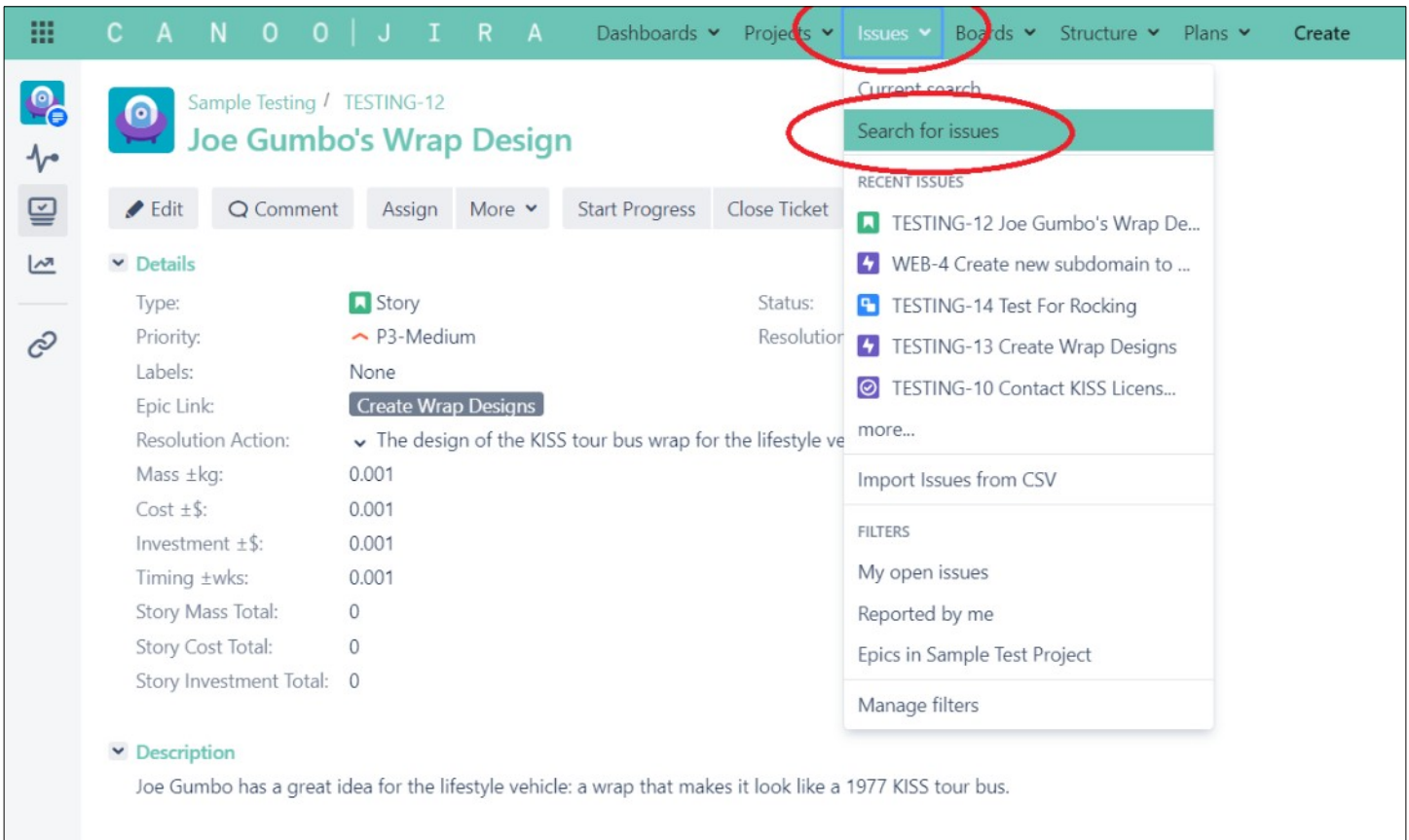
- **Search for Issue**
- **Save Search**
- **Email Search**
- **Share Search**

Search for Issue

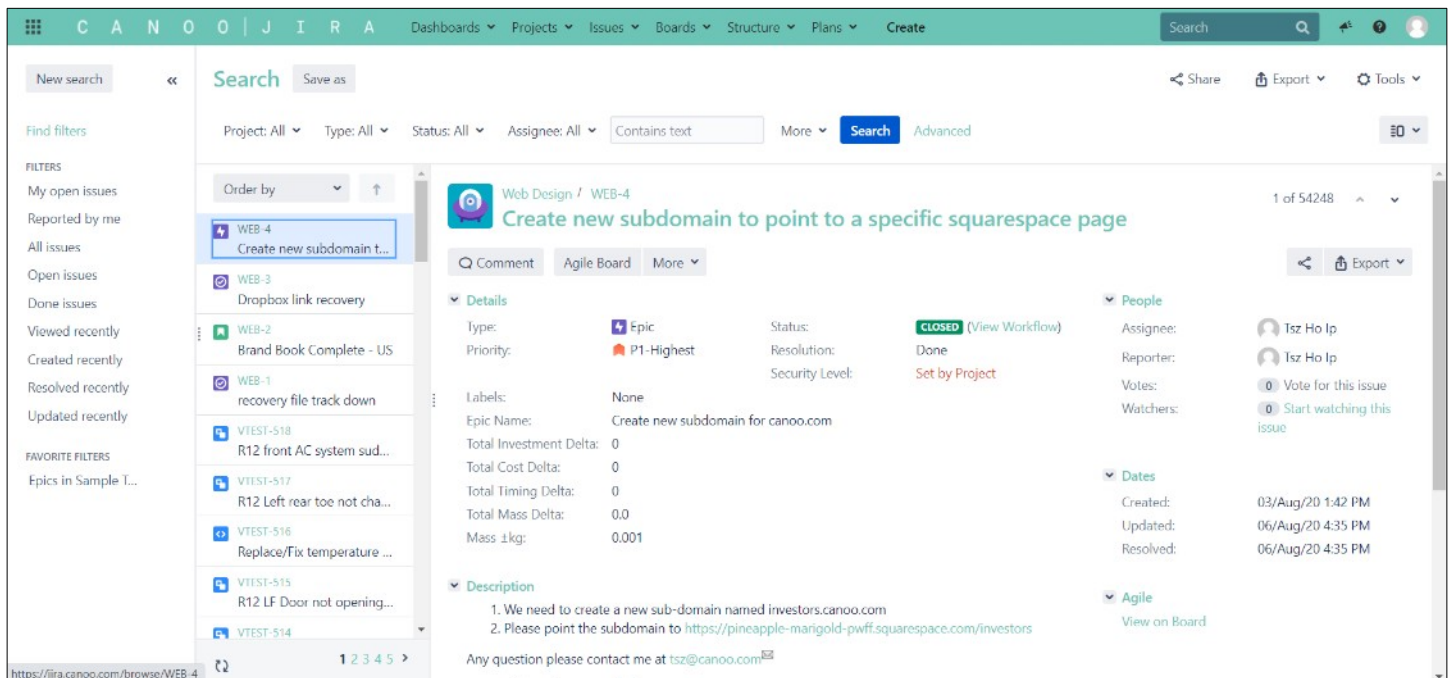
1. Make sure that the [Your Name]'s Wrap Design issue is open.

2. In the top bar, click **Issues**.

When the menu appears, click **Search for issues**.

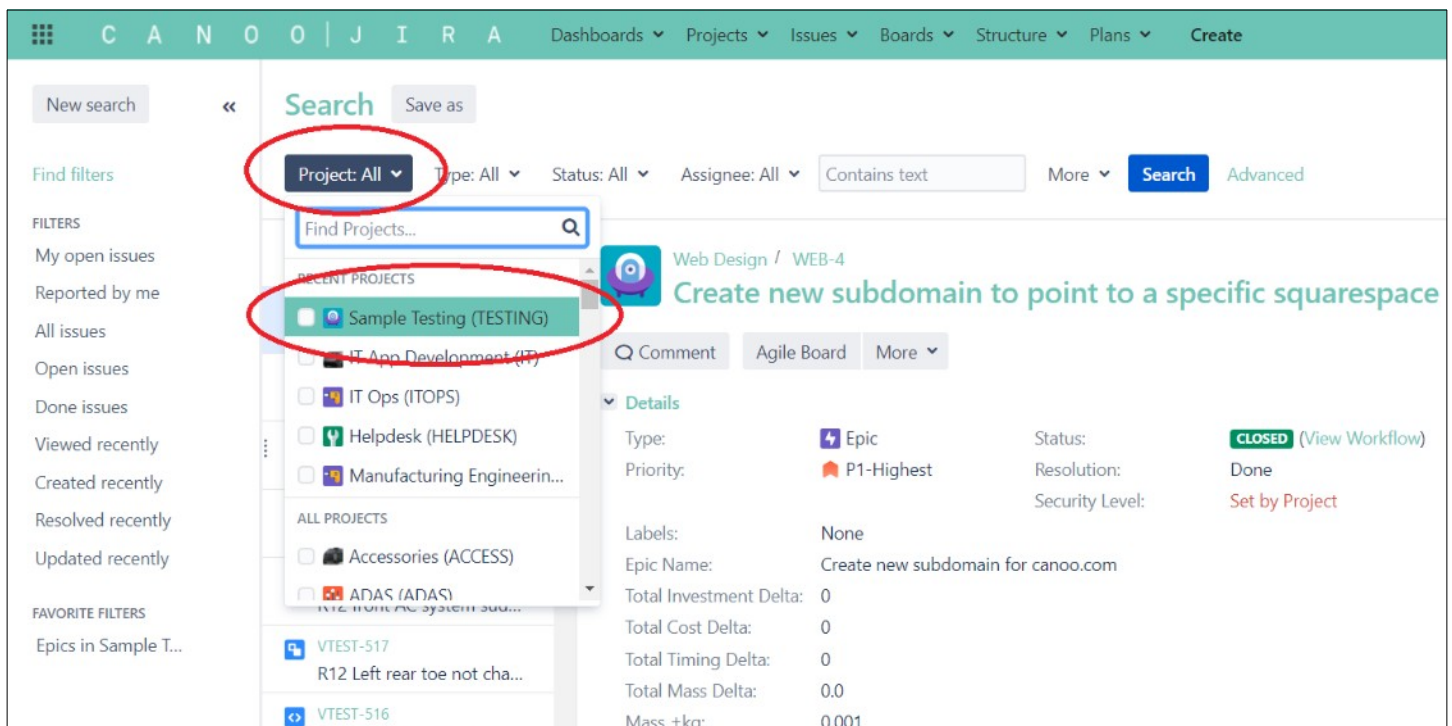


The **Search** screen will appear.



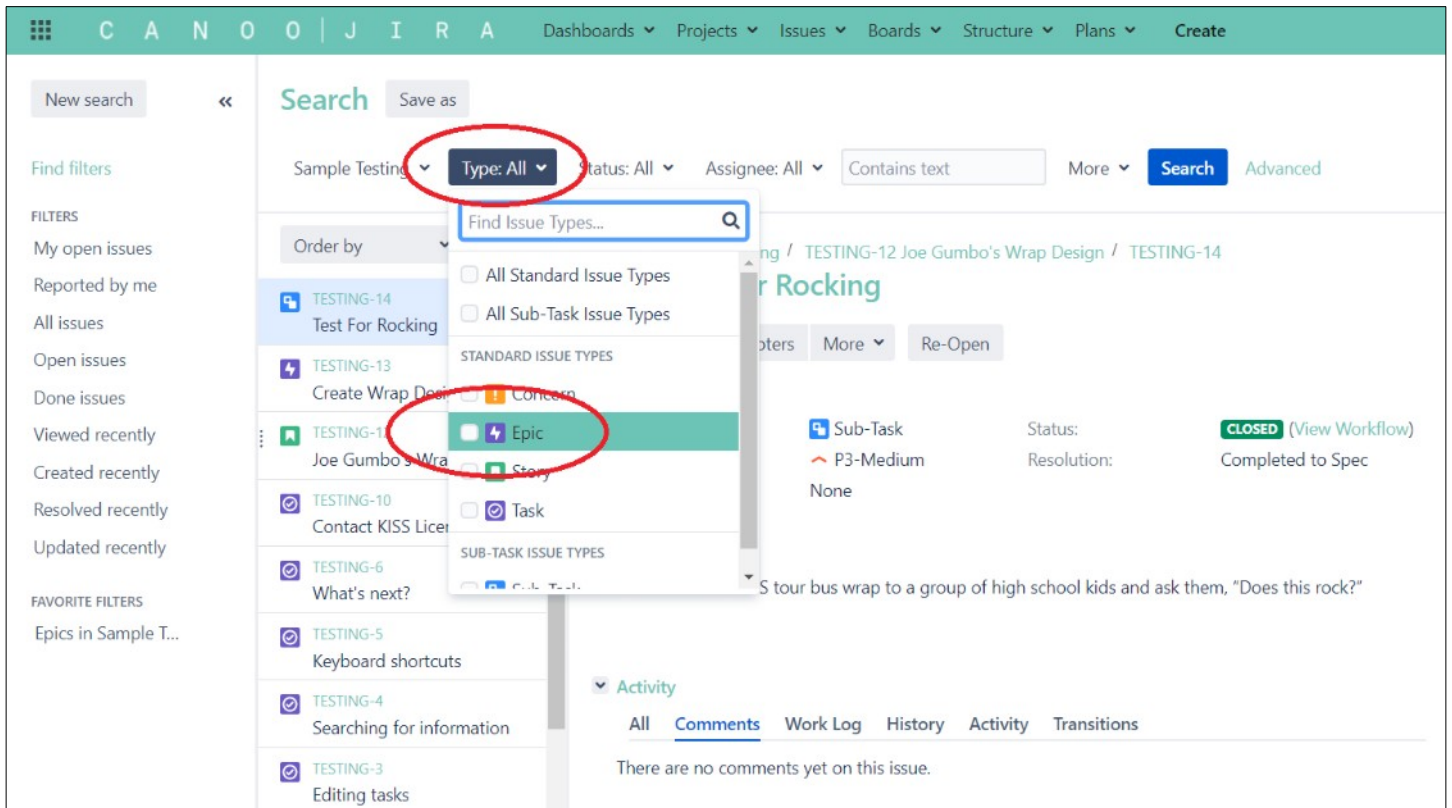
3. Click the **Project** criterion.

When the menu appears, click the **Sample Testing** project.



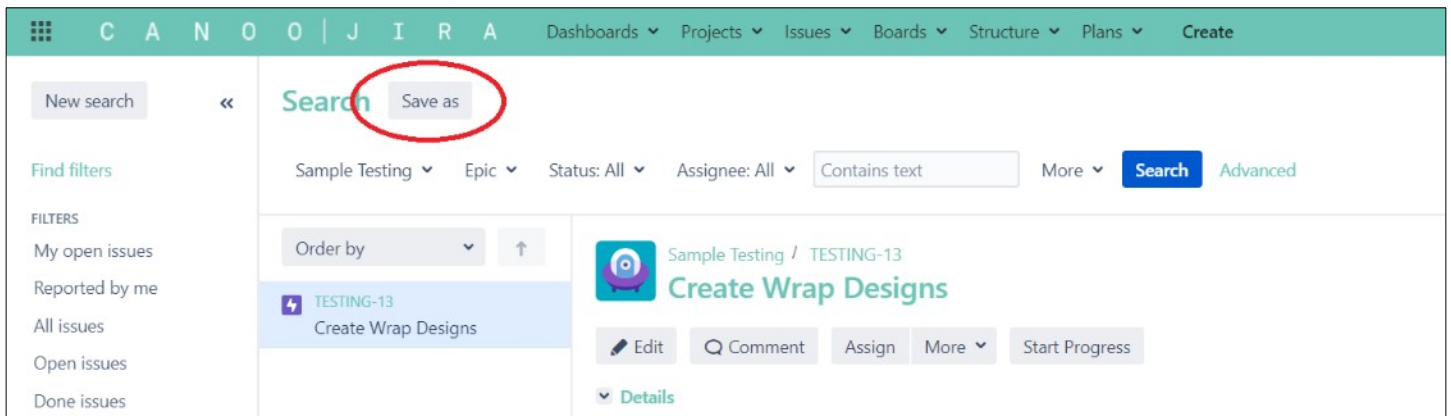
4. Click the **Type** criterion.

When the menu appears, click **Epic**.

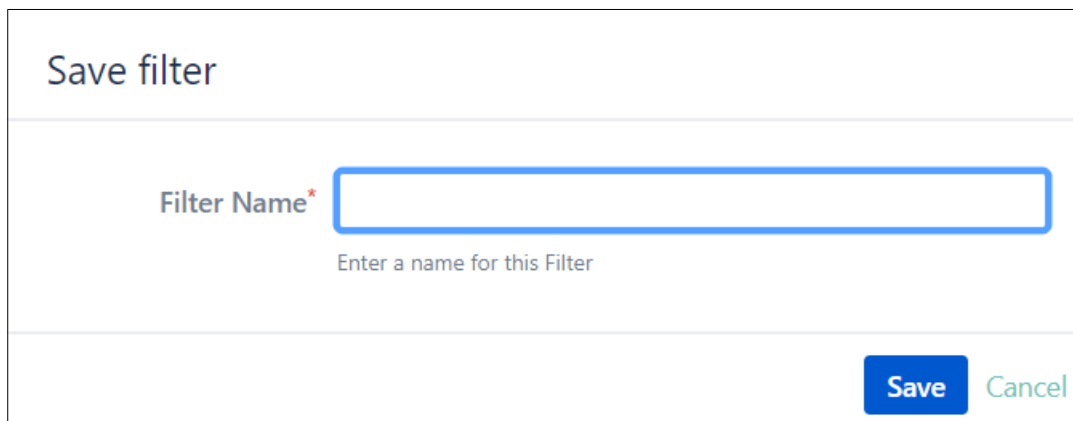


Save Search

1. At the top of the **Search** screen, click the **Save as** button.

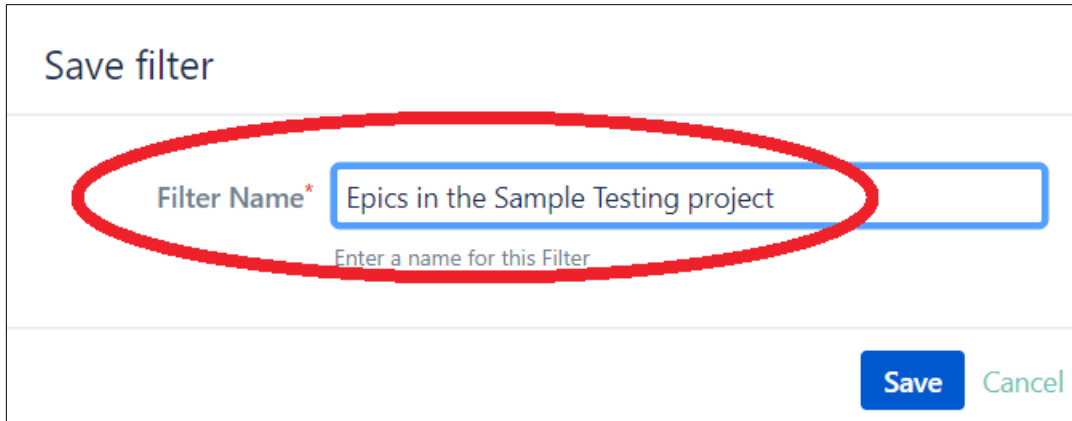


The **Save Filter** window will appear.

A screenshot of the 'Save filter' dialog box. The title is 'Save filter'. Below the title is a text input field labeled 'Filter Name*' with a red asterisk. Below the input field is the placeholder text 'Enter a name for this Filter'. At the bottom right of the dialog are two buttons: 'Save' and 'Cancel'.

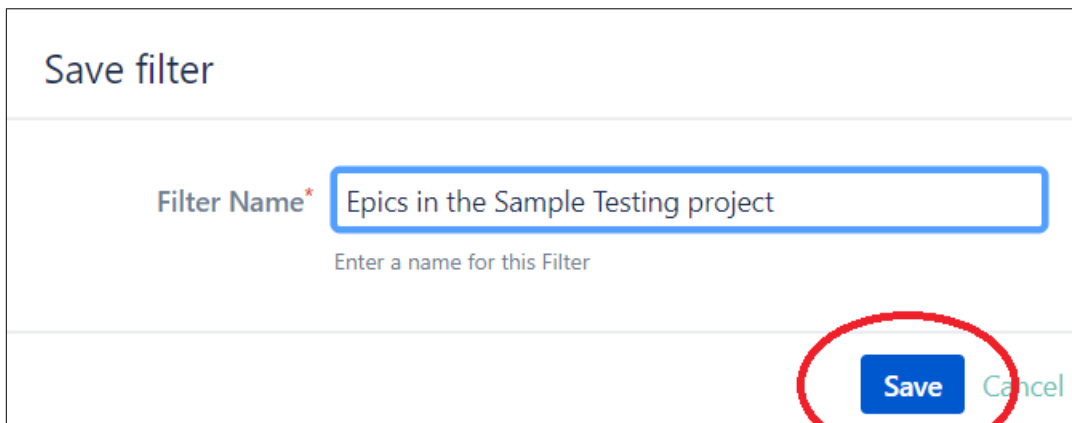
2. In the **Filter Name** box, type:

Epics in the Sample Testing project



The screenshot shows a 'Save filter' dialog box. At the top, the title 'Save filter' is displayed. Below the title is a text input field labeled 'Filter Name*' with a red asterisk. The text 'Epics in the Sample Testing project' is entered into the field. Below the input field is the placeholder text 'Enter a name for this Filter'. At the bottom right of the dialog, there are two buttons: a blue 'Save' button and a grey 'Cancel' button. A red oval highlights the entire input field area.

3. Click the **Save** button.



The screenshot shows the same 'Save filter' dialog box as above. The text 'Epics in the Sample Testing project' is still in the input field. In this screenshot, a red oval highlights the 'Save' button at the bottom right of the dialog.

The **Epics in the Sample Testing project** search should now appear in the sidebar, under **Favorite Filters**:

The screenshot displays the JIRA web interface. At the top, the navigation bar includes 'C A N O O | J I R A' and various menu items like 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', 'Plans', and 'Create'. The main header area shows the current search: 'Epics in the Sample Testing project', with options to 'Save as' and 'Details'. Below this, filters are applied: 'Sample Testing', 'Epic', 'Status: All', 'Assignee: All', and a search box containing 'Contains text'. A 'Search' button and an 'Advanced' link are also present.

The left sidebar contains a 'Find filters' section with a list of filter categories: 'My open issues', 'Reported by me', 'All issues', 'Open issues', 'Done issues', 'Viewed recently', 'Created recently', 'Resolved recently', and 'Updated recently'. Under the 'FAVORITE FILTERS' section, the filter 'Epics in the Sam...' is highlighted with a red circle.

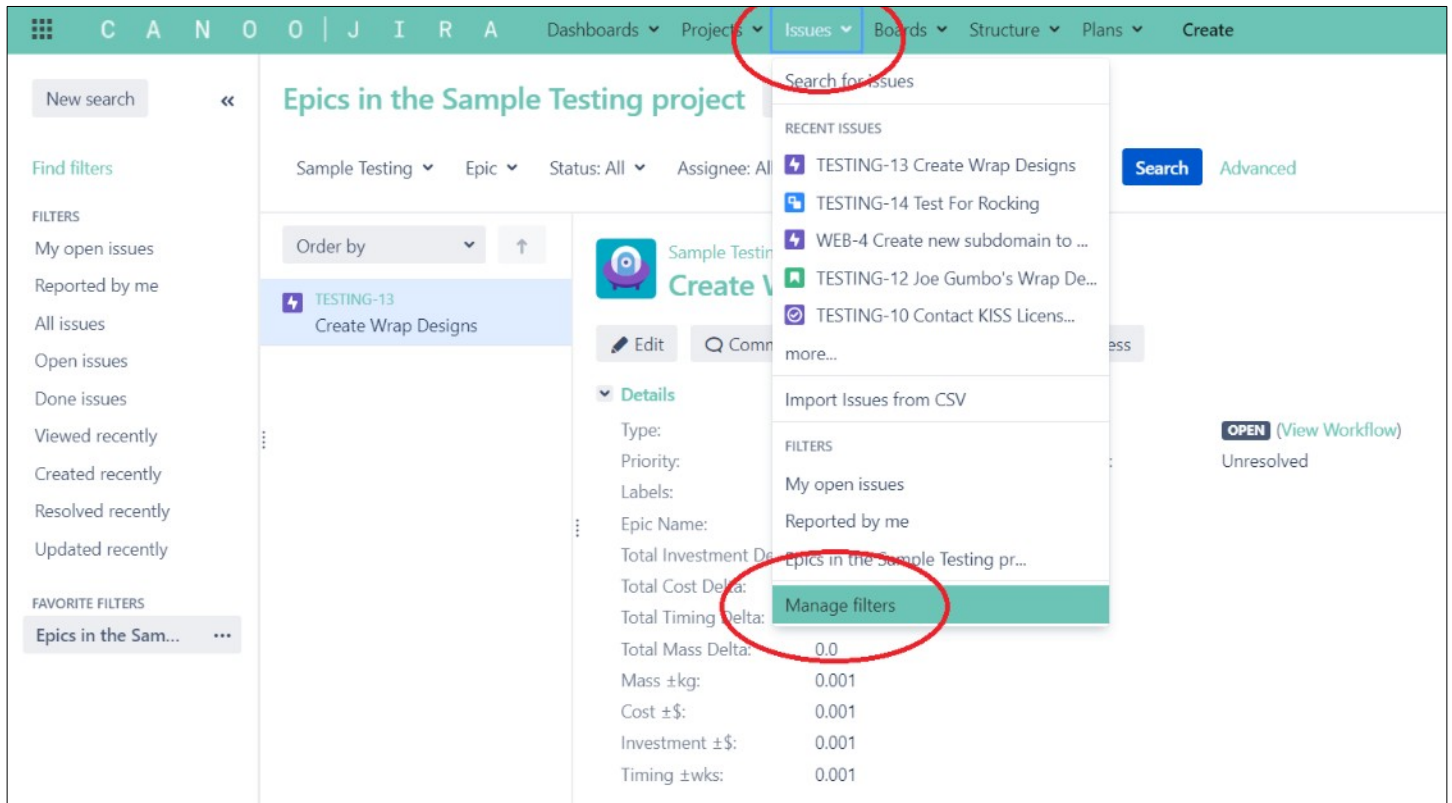
The main content area shows the details for the selected filter, 'TESTING-13 Create Wrap Designs'. It includes an 'Order by' dropdown, an 'Edit' button, a 'Comment' button, an 'Assign' button, a 'More' dropdown, and a 'Start Progress' button. The 'Details' section lists various attributes:

Type:	Epic	Status:	OPEN (View Workflow)
Priority:	P3-Medium	Resolution:	Unresolved
Labels:	None		
Epic Name:	Create Wrap Designs		
Total Investment Delta:	0		
Total Cost Delta:	0		
Total Timing Delta:	0		
Total Mass Delta:	0.0		
Mass ±kg:	0.001		
Cost ±\$:	0.001		
Investment ±\$:	0.001		
Timing ±wks:	0.001		

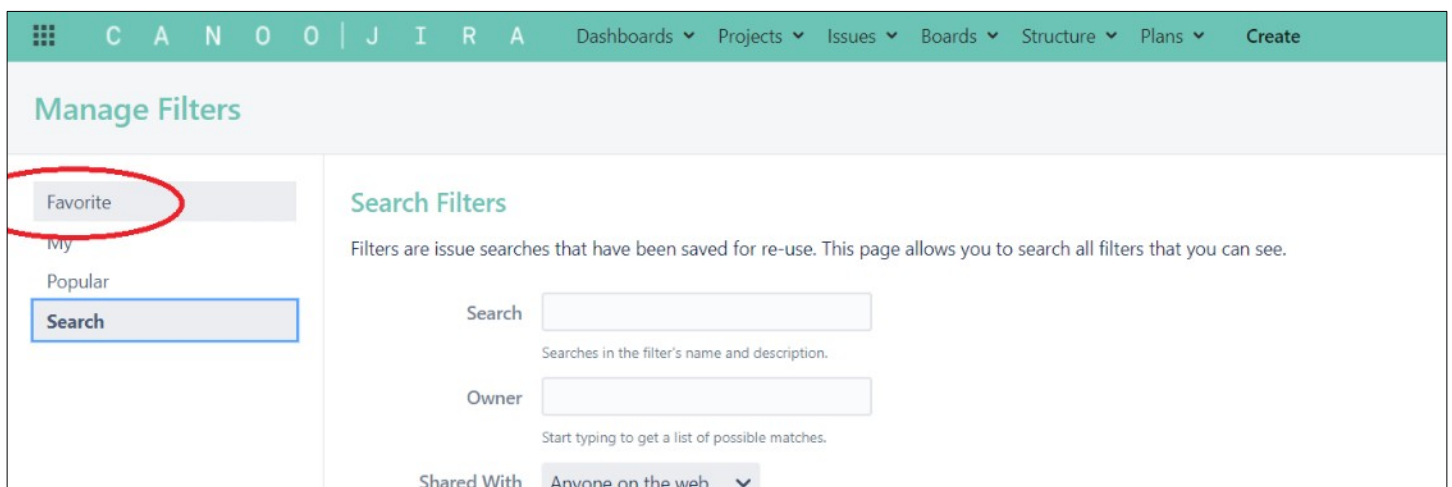
Email Search

1. In the top bar, click **Issues**.

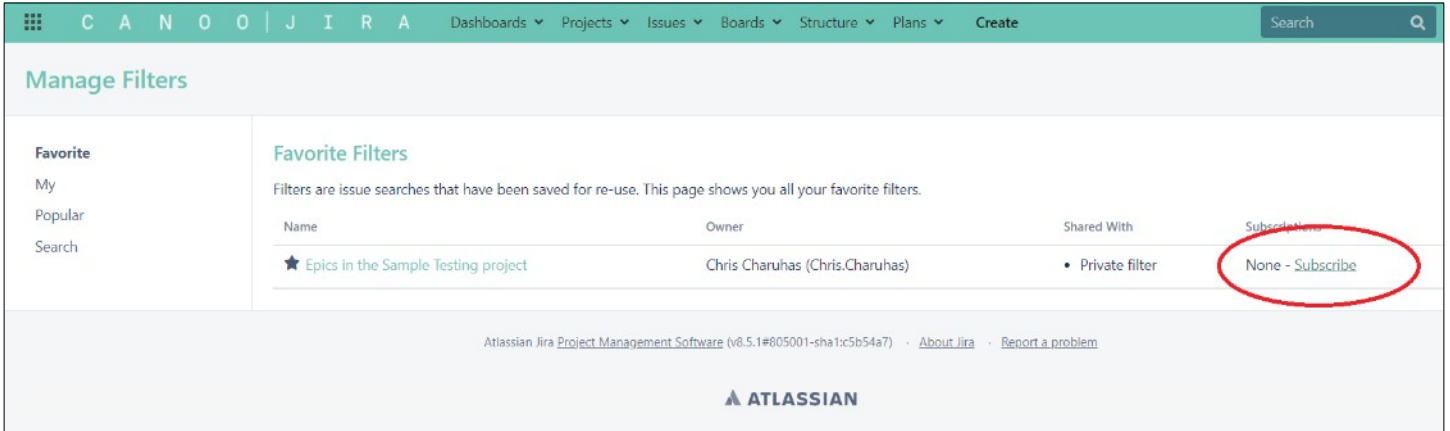
When the menu appears, click **Manage filters**.



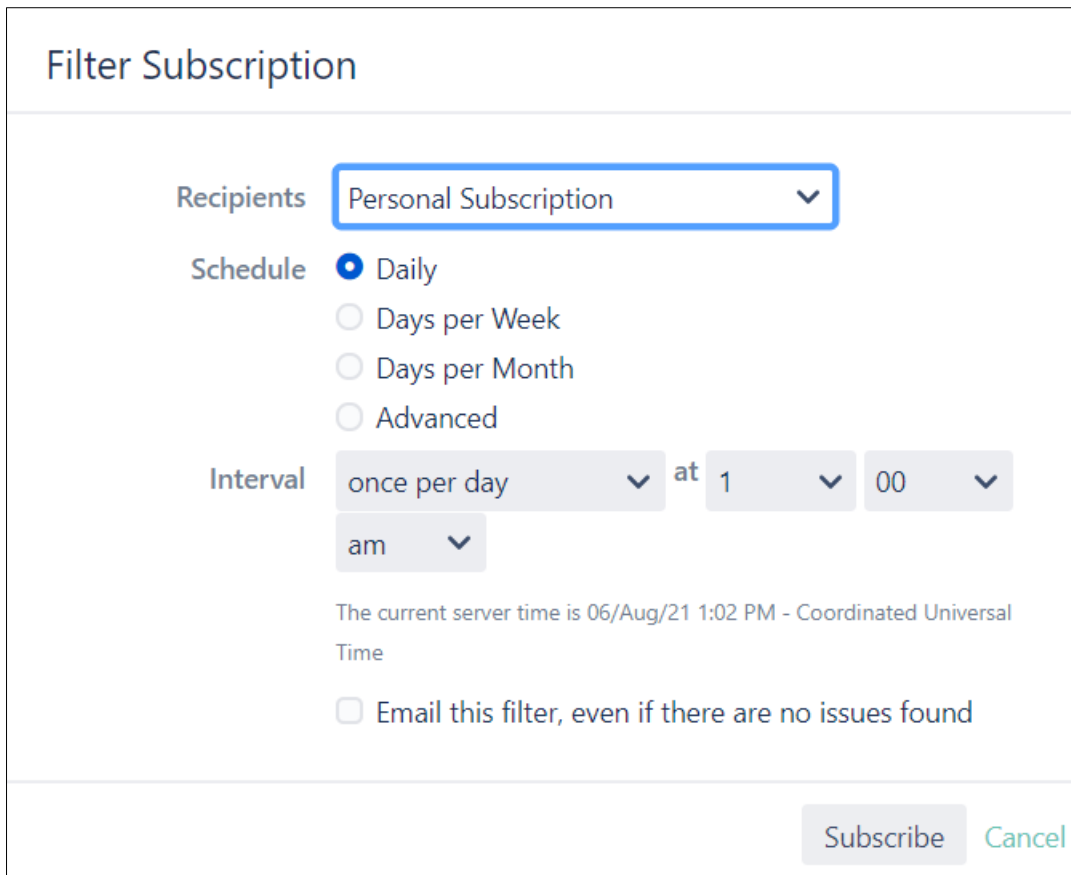
2. In the **Favorite Filters** screen, in the sidebar, click **Favorite**.



3. In the row for the Epics in the **Sample Testing project** search, click the **Subscribe** link.



The **Filter Subscription** window should appear.



Note: This enables you to send out an email to a person or group that contains a list of all the issues in this search.

4. Click in the **Recipients** box.

When the menu appears, click **Personal Subscription**.

Filter Subscription

Recipients Personal Subscription

Schedule Personal Subscription
jira-software-users
team-internal-canoo
team-it-ops

Advanced

Interval once per day at 1 00 am

The current server time is 06/Aug/21 1:02 PM - Coordinated Universal Time

Email this filter, even if there are no issues found

Subscribe Cancel

5. In the **Schedule** list, click the Daily, Days per Week, Days per Month, and Advanced radio buttons to see the email time intervals available.

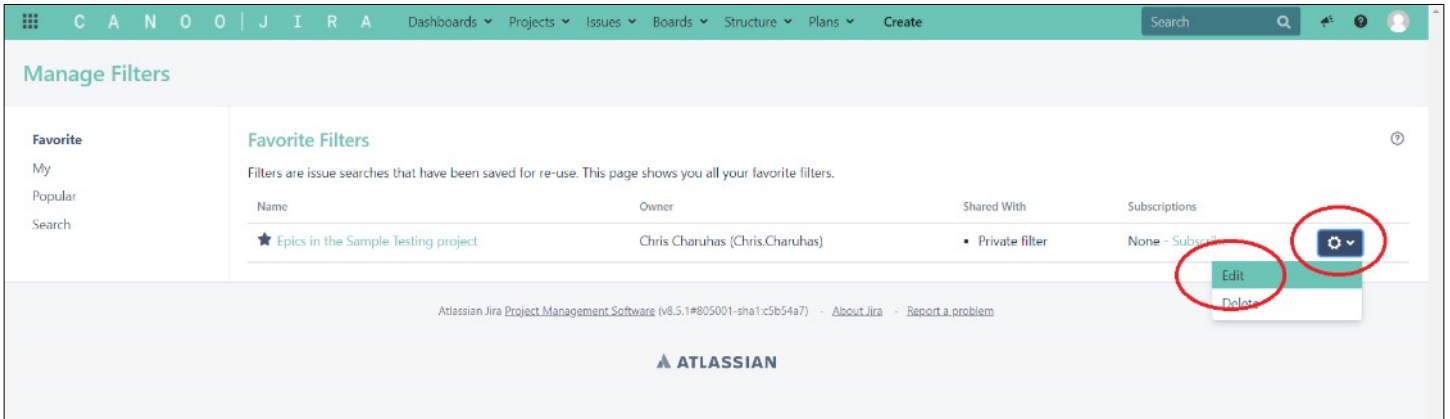
6. At the bottom of the window, click the **Cancel** link.

To have the search emailed to you or a group at the specified time interval, you would have clicked the **Subscribe** button.

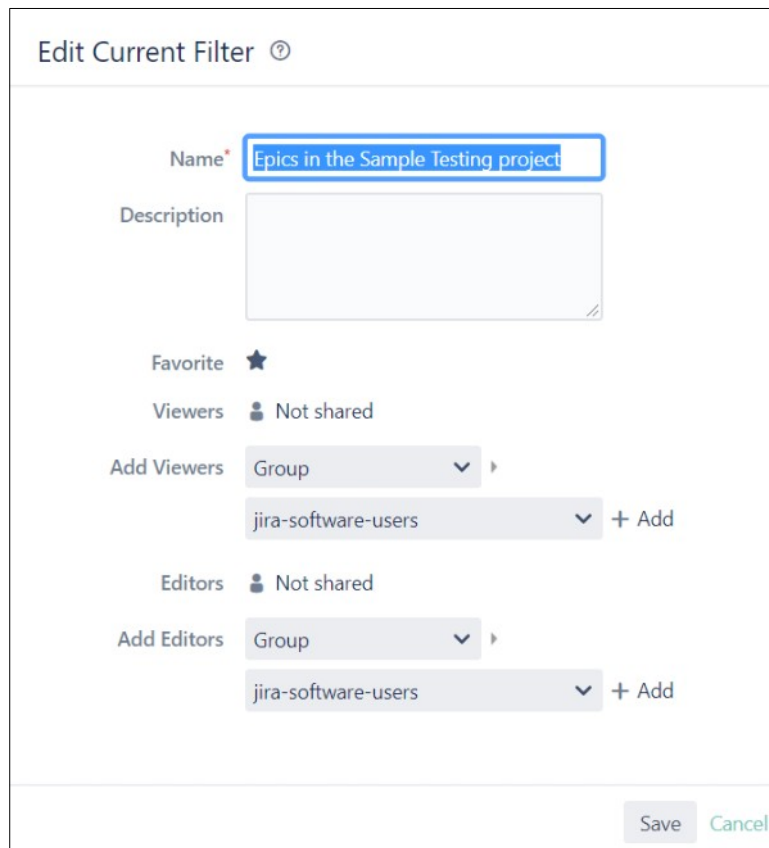
Share Search

1. In the **Manage Filters** screen, click the gear icon in the **Epics in the Sample Testing project** row.

When the menu appears, click **Edit**.



The **Edit Current Filter** window will appear.



2. Click the **Add Viewers** box.

When the menu appears, note the choices: Group, Project, and Any logged-in user.

Edit Current Filter ⓘ

Name* Epics in the Sample Testing project

Description

Favorite ★

Viewers Not shared

Add Viewers Group ▾

- Group
- Project
- Any logged-in user

Editors Not shared

Add Editors Group ▾

jira-software-users ▾ + Add

Save Cancel

3. Click **Any logged-in user**.

4. Beside the box, click **Add**.

Edit Current Filter ?

Name*

Description

Favorite

Viewers Not shared

Add Viewers + Add

Editors Not shared

Add Editors + Add

5. Click the **Save** button at the bottom of the window.

Edit Current Filter ⓘ

Name*

Description

Favorite

Viewers Shared with logged-in users (VIEW)

Add Viewers

Editors Not shared

Add Editors

Your choice of people to share the search with should show up in the **Shared With** column:

Manage Filters

Favorite Filters

Filters are issue searches that have been saved for re-use. This page shows you all your favorite filters.

Name	Owner	Shared With	Subscriptions
★ Epics in the Sample Testing project	Chris Charuhas (Chris.Charuhas)	• Shared with logged-in users (VIEW)	None - Subscribe

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WORK WITH DASHBOARDS

In this section, you'll learn how to:

- **Search for Dashboard**
- **Add as a Favorite**

Callout: What is a Dashboard?

In Jira, a dashboard is a landing page that allows you to see a variety of info in one convenient location.

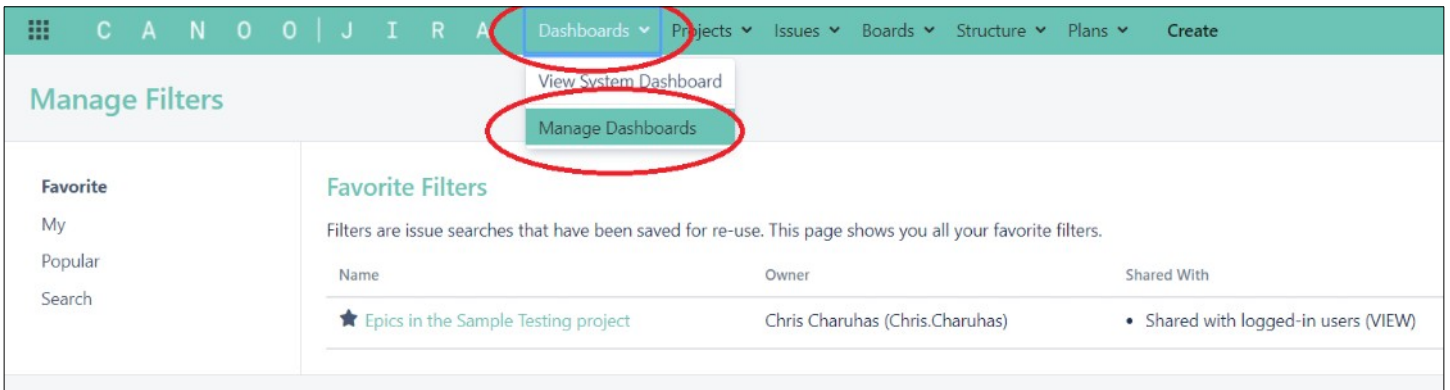
It's customizable, so you can configure it to display info that's relevant to you.

Search for Dashboard

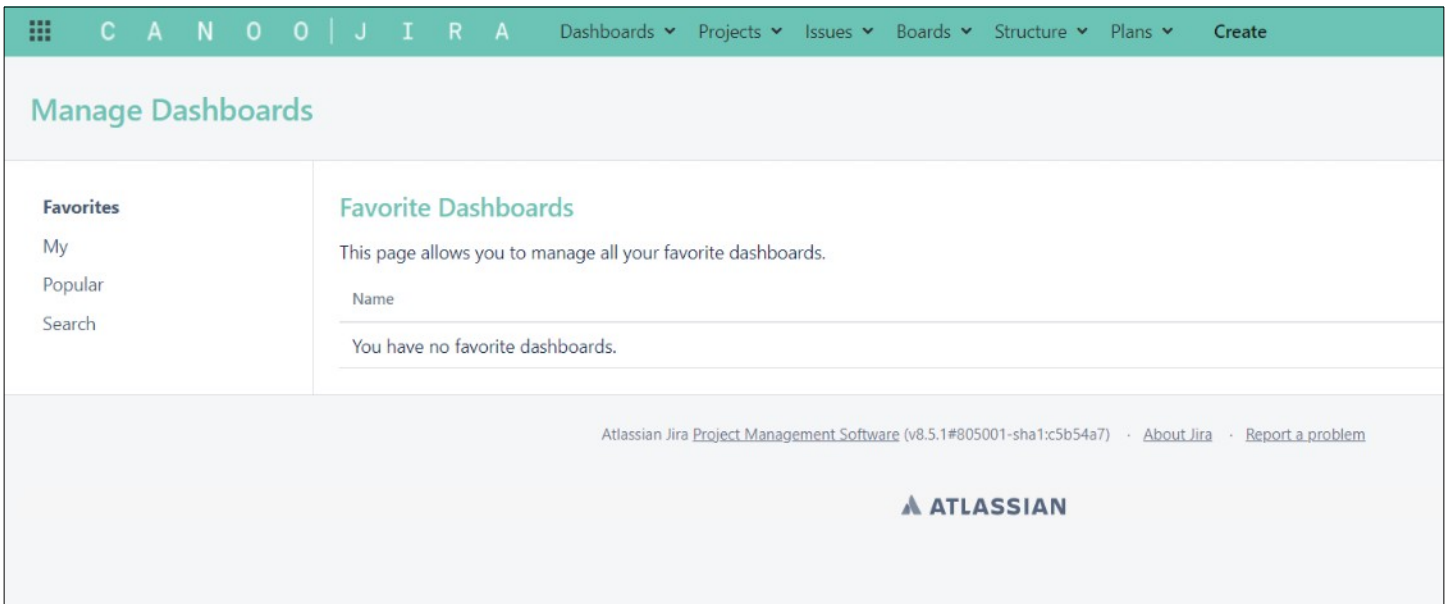
1. Make sure that the [Your Name]'s **Wrap Design** issue is open.

2. In the top bar, click **Dashboards**.

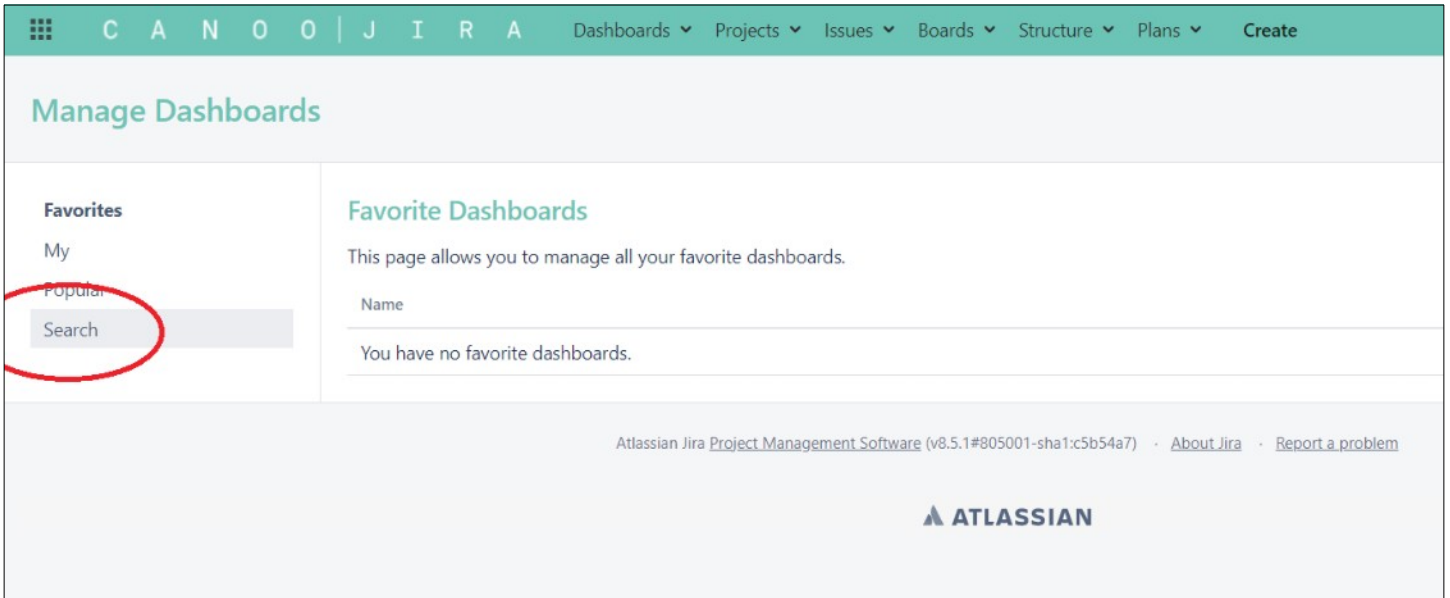
When the menu appears, click **Manage Dashboards**.



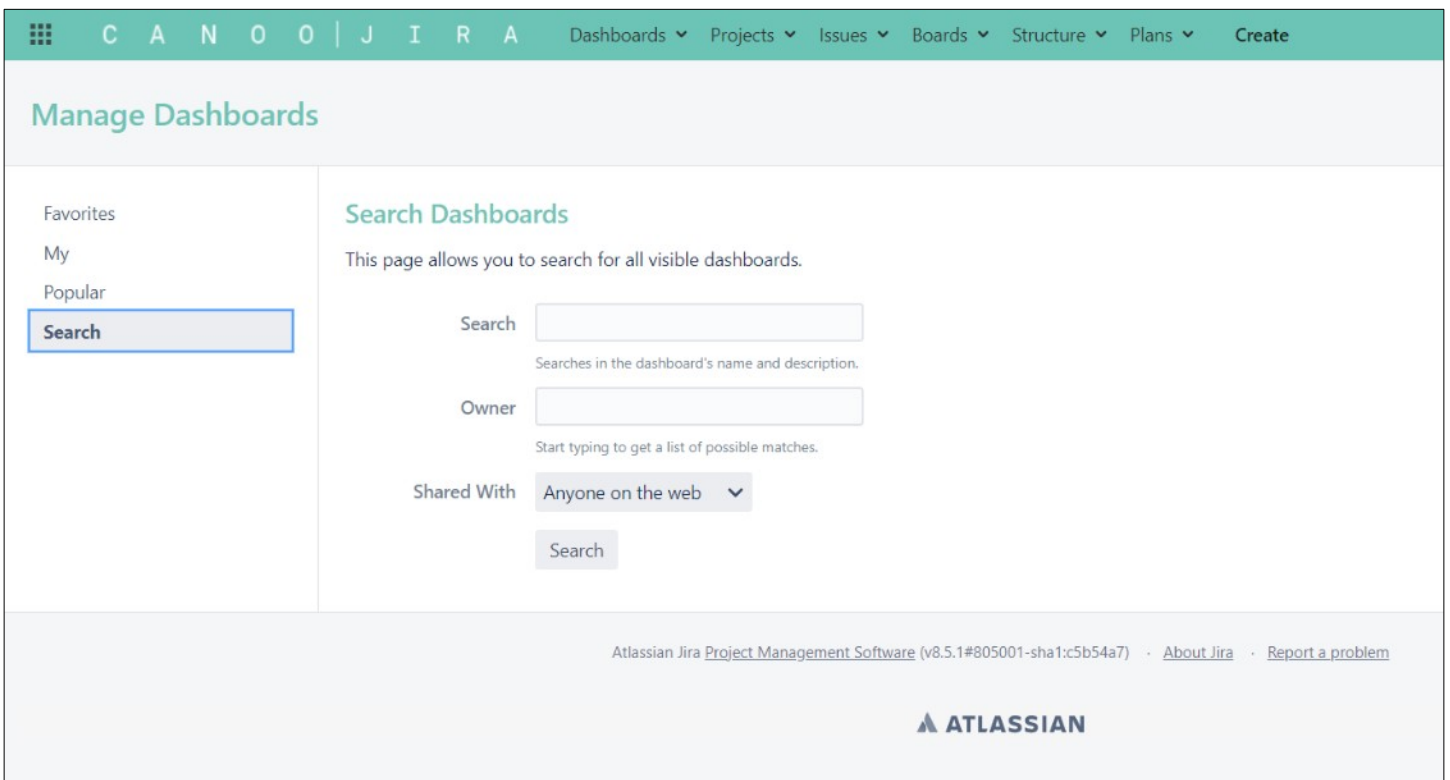
The **Manage Dashboards** screen should appear:



3. In the sidebar, click **Search**.



A **Search Dashboards** area should appear:



4. Click the **Search** button.

The screenshot shows the 'Manage Dashboards' page in Jira. The top navigation bar includes a menu icon, the text 'C A N O O | J I R A', and dropdown menus for 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', and 'Plans', along with a 'Create' button. The main heading is 'Manage Dashboards'. On the left, there is a sidebar with 'Favorites', 'My', 'Popular', and 'Search' (highlighted with a blue border). The main content area is titled 'Search Dashboards' and contains the text 'This page allows you to search for all visible dashboards.' Below this are three search filters: 'Search' (with a text input field and the note 'Searches in the dashboard's name and description.'), 'Owner' (with a text input field and the note 'Start typing to get a list of possible matches.'), and 'Shared With' (with a dropdown menu set to 'Anyone on the web'). A 'Search' button is located below the 'Shared With' dropdown and is circled in red. At the bottom of the page, there is a footer with the text 'Atlassian Jira Project Management Software (v8.5.1#805001-sha1:c5b54a7) · [About Jira](#) · [Report a problem](#)' and the Atlassian logo.

A list of all available dashboards should appear:

The screenshot shows the 'Manage Dashboards' page in Jira. The page has a teal header with the Jira logo and navigation menus for Dashboards, Projects, Issues, Boards, Structure, Plans, and a Create button. On the left, there is a sidebar with 'Favorites', 'My', 'Popular', and 'Search' options. The main content area is titled 'Search Dashboards' and includes a search box, an owner filter, and a 'Shared With' dropdown menu. Below these filters is a table listing dashboards. A red oval highlights the table content.

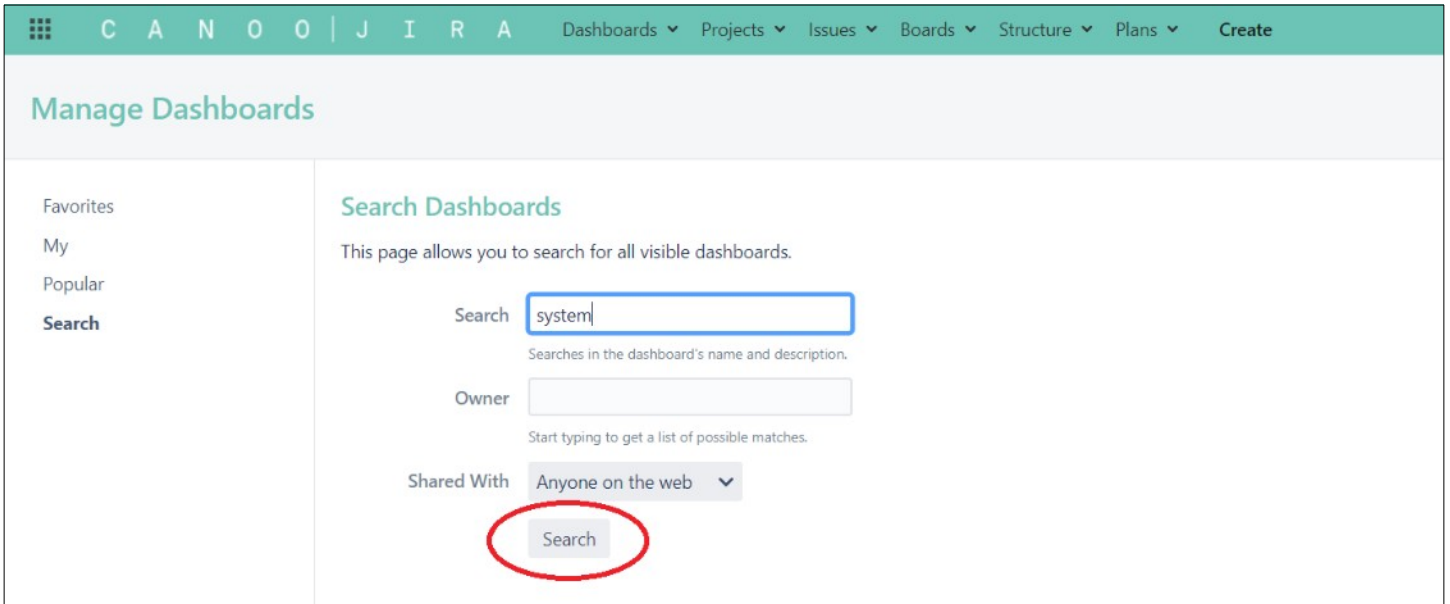
Name	Owner	Shared With
☆ 3DX Releases	Jira Service (jiraservice)	• Shared with logged-in users (VIEW)
☆ 56 Burndown Dashboard 56 Burndown Dashboard	Swee-Fun Liong (swee-fun.liong)	• 5 shares Show
☆ 58 Burndown Dashboard 58 Burndown Dashboard	Swee-Fun Liong (swee-fun.liong)	• Project: Vehicle Software (EDIT)
☆ Aaron's Dashboard	Aaron Srithongkham (aaron.srithongkham)	• Project: Helpdesk (VIEW) • Project: IT Ops (VIEW)

5. In the **Search** box, type:

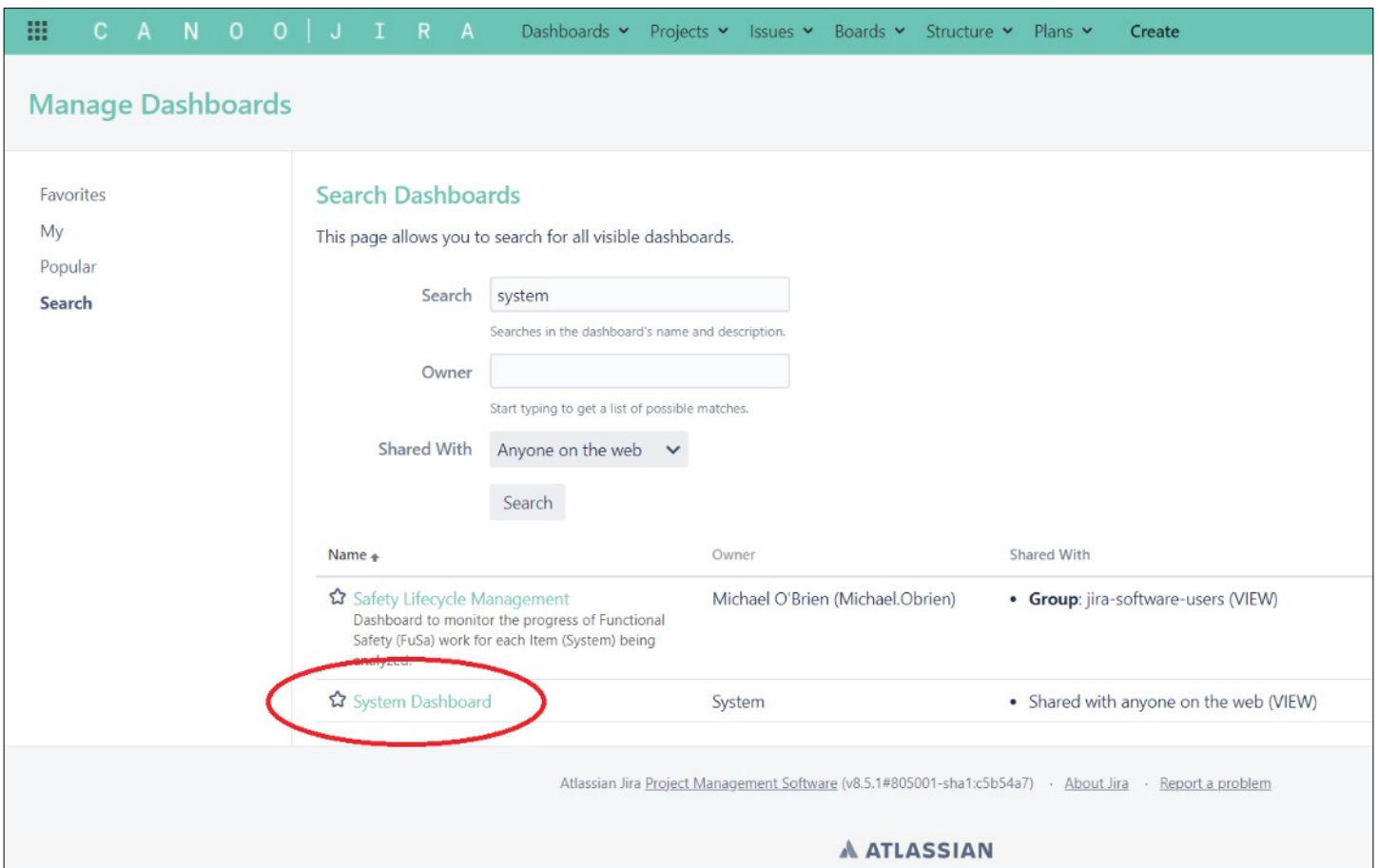
system

This screenshot is identical to the previous one, but the search box in the 'Search Dashboards' section now contains the text 'system'. A red oval highlights the search box, and a blue border is around the text 'system'.

6. Click the **Search** button.

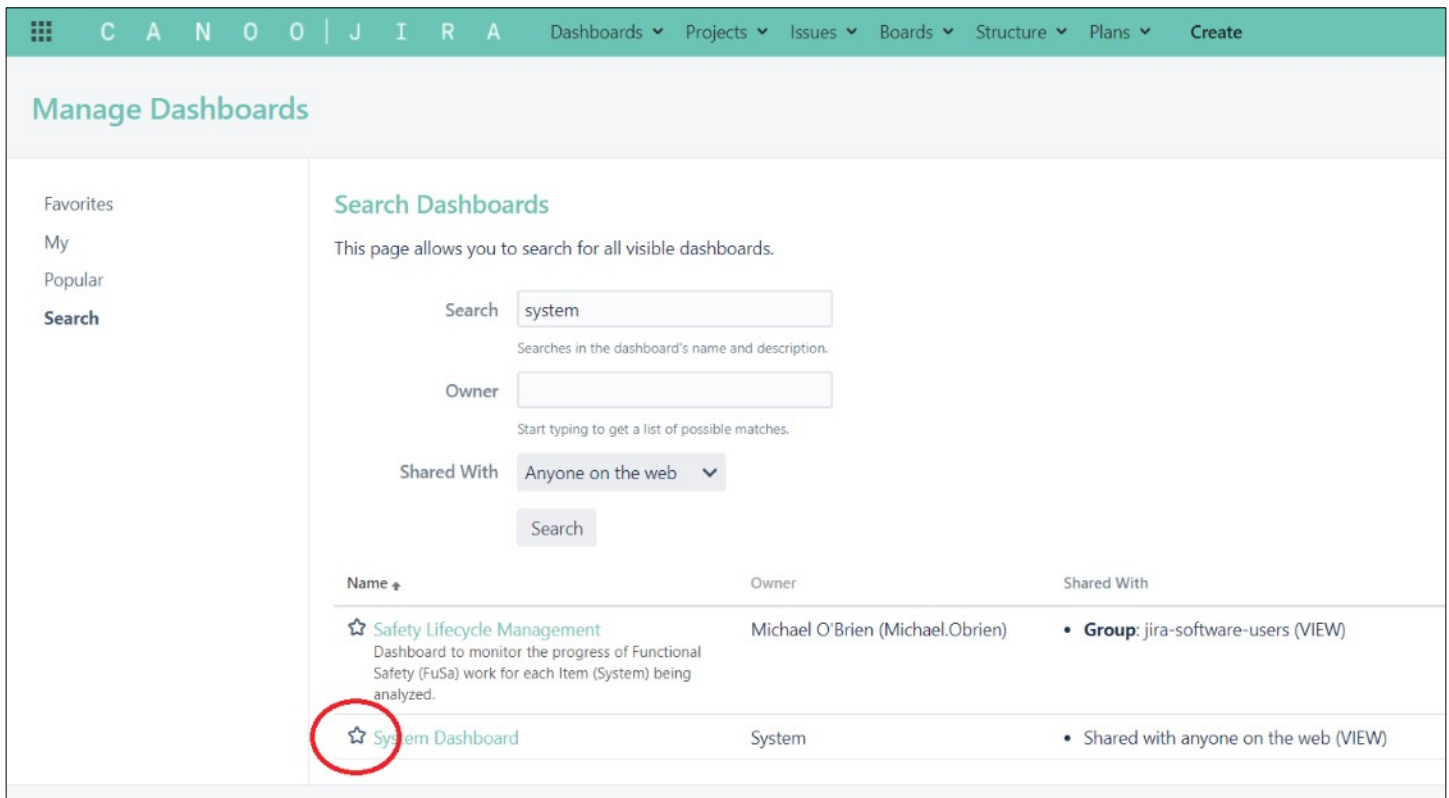


The **System Dashboard** dashboard should appear in the list of search results:



Add as a Favorite

1. In the list of search results, click the star to the left of the **System Dashboard** dashboard.

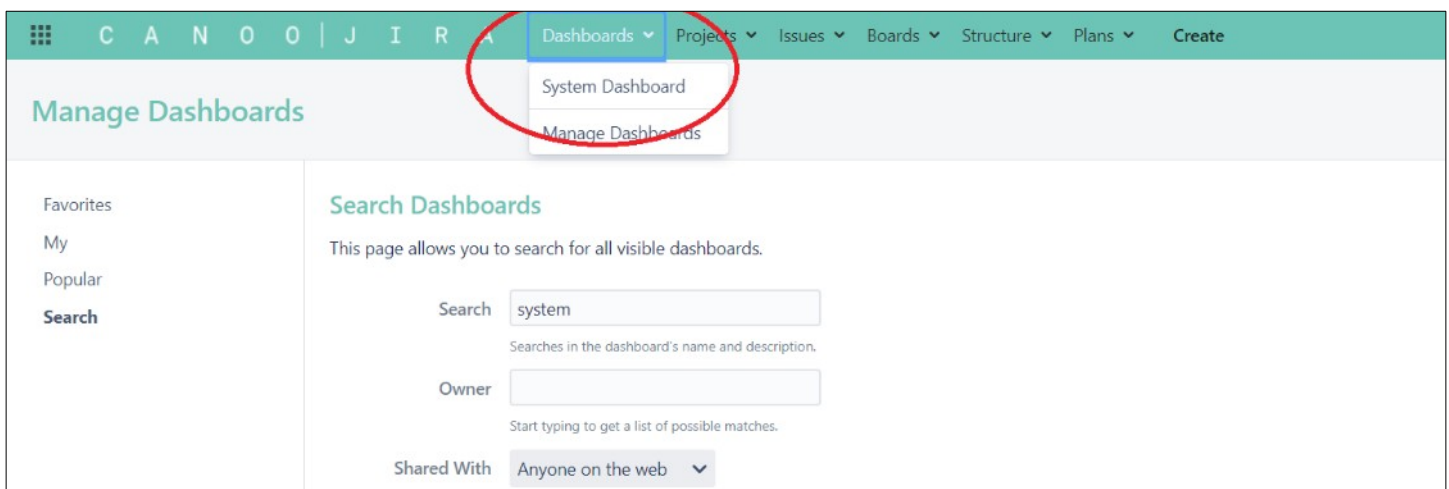


The screenshot shows the 'Manage Dashboards' page in Jira. The top navigation bar includes 'C A N O O | J I R A' and various menu items like 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', 'Plans', and 'Create'. The main content area is titled 'Manage Dashboards' and contains a 'Search Dashboards' section. This section has a search input field with 'system' entered, and a 'Search' button. Below the search filters, there is a table of search results. The first result is 'Safety Lifecycle Management' with a star icon. The second result is 'System Dashboard', which also has a star icon circled in red. The table columns are 'Name', 'Owner', and 'Shared With'.

Name	Owner	Shared With
☆ Safety Lifecycle Management Dashboard to monitor the progress of Functional Safety (FuSa) work for each Item (System) being analyzed.	Michael O'Brien (Michael.Obrien)	• Group: jira-software-users (VIEW)
☆ System Dashboard	System	• Shared with anyone on the web (VIEW)

2. In the top bar, click **Dashboards**.

When the menu appears, the **System Dashboard** dashboard should be listed in the menu.



The screenshot shows the 'Manage Dashboards' page in Jira. The top navigation bar includes 'C A N O O | J I R A' and various menu items like 'Dashboards', 'Projects', 'Issues', 'Boards', 'Structure', 'Plans', and 'Create'. The 'Dashboards' menu is open, showing a list of items: 'System Dashboard' and 'Manage Dashboards'. The 'System Dashboard' item is circled in red. The main content area is titled 'Manage Dashboards' and contains a 'Search Dashboards' section. This section has a search input field with 'system' entered, and a 'Search' button. Below the search filters, there is a table of search results. The first result is 'Safety Lifecycle Management' with a star icon. The second result is 'System Dashboard', which also has a star icon circled in red. The table columns are 'Name', 'Owner', and 'Shared With'.

Name	Owner	Shared With
☆ Safety Lifecycle Management Dashboard to monitor the progress of Functional Safety (FuSa) work for each Item (System) being analyzed.	Michael O'Brien (Michael.Obrien)	• Group: jira-software-users (VIEW)
☆ System Dashboard	System	• Shared with anyone on the web (VIEW)