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:

BEGIN USING JIRA

In this section, you'll learn how to:

- **Open a Project**
- **View Project Issues**
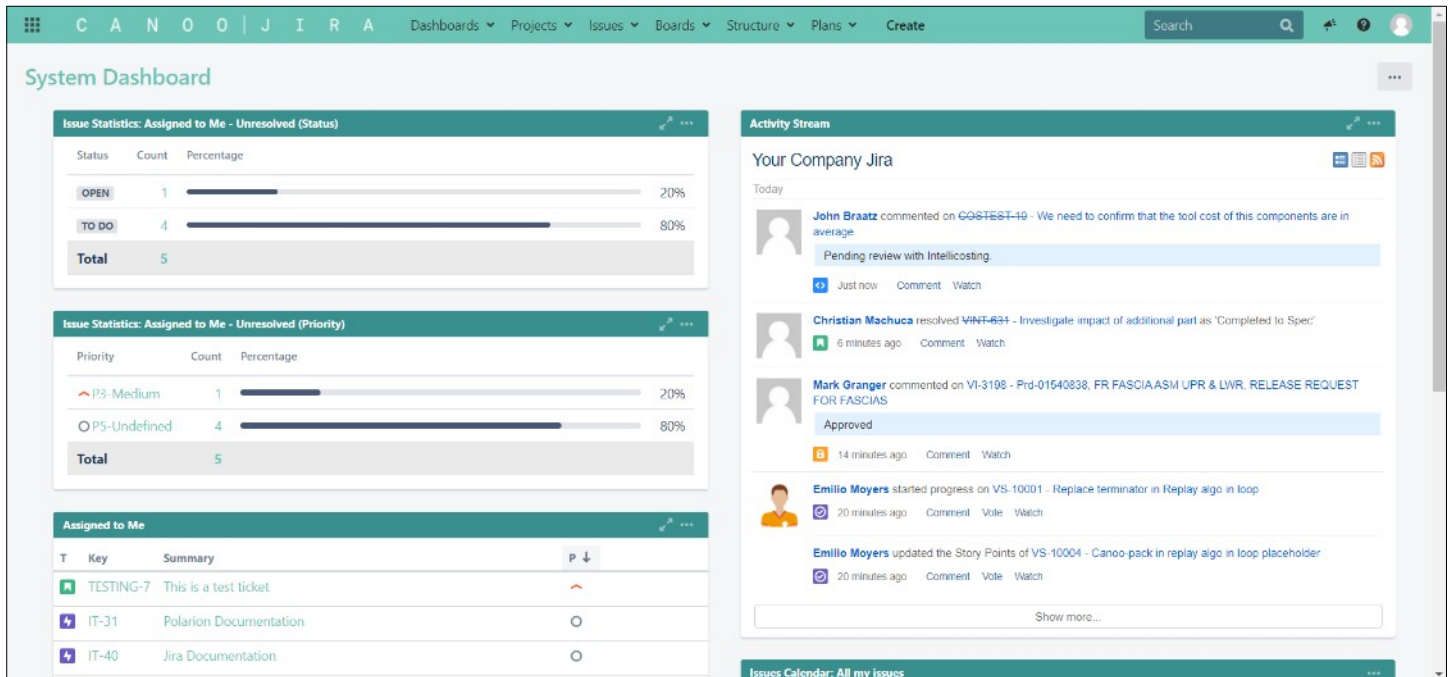
Callout: What is Jira used for at Canoo?

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.
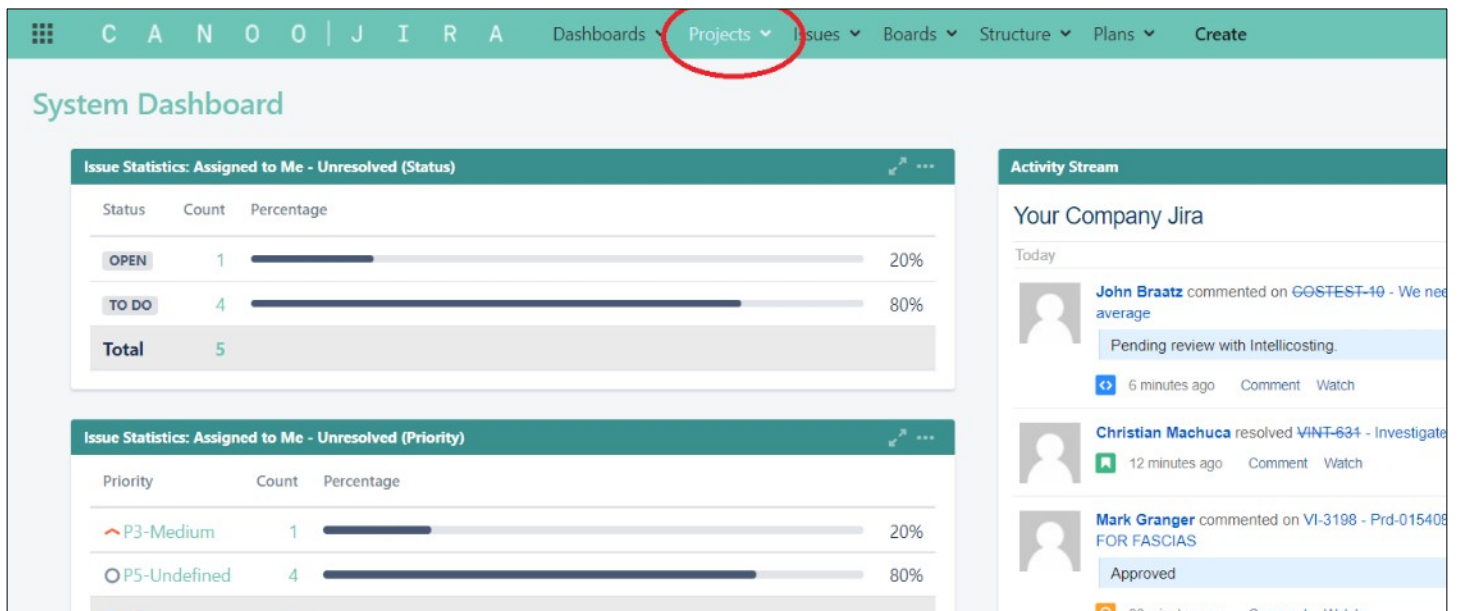
Open a Project

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 **Browse Projects** screen should appear.

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

sample

The **Sample Testing** project should appear.

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

It should open and look like this:

View Project Issues

1. In the sidebar, make sure **Issues** is selected.
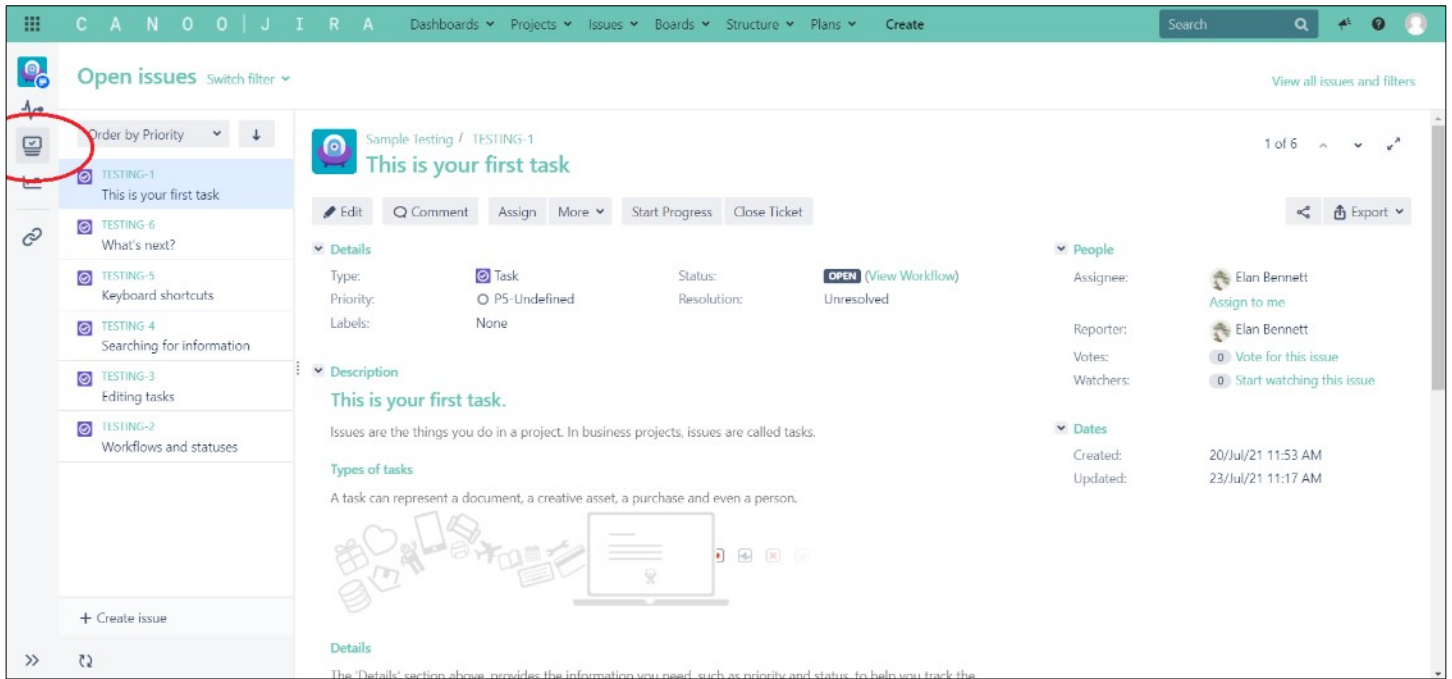
2. Click the second issue in the list of issues.

It should open and look like this:

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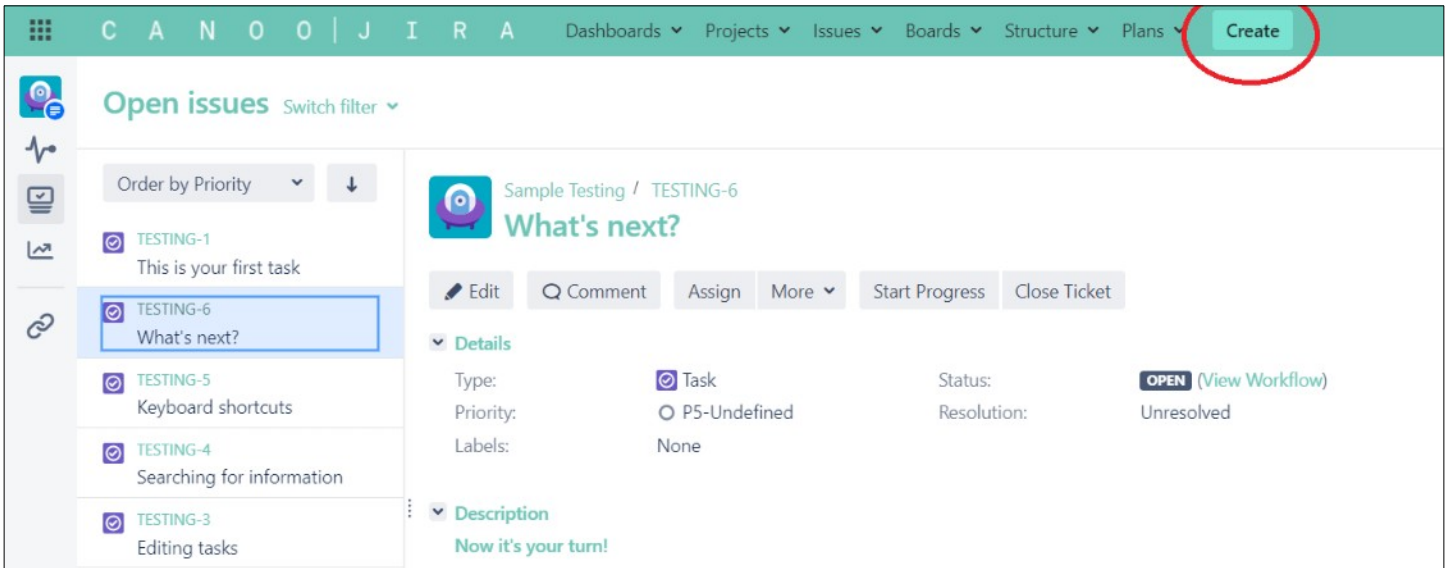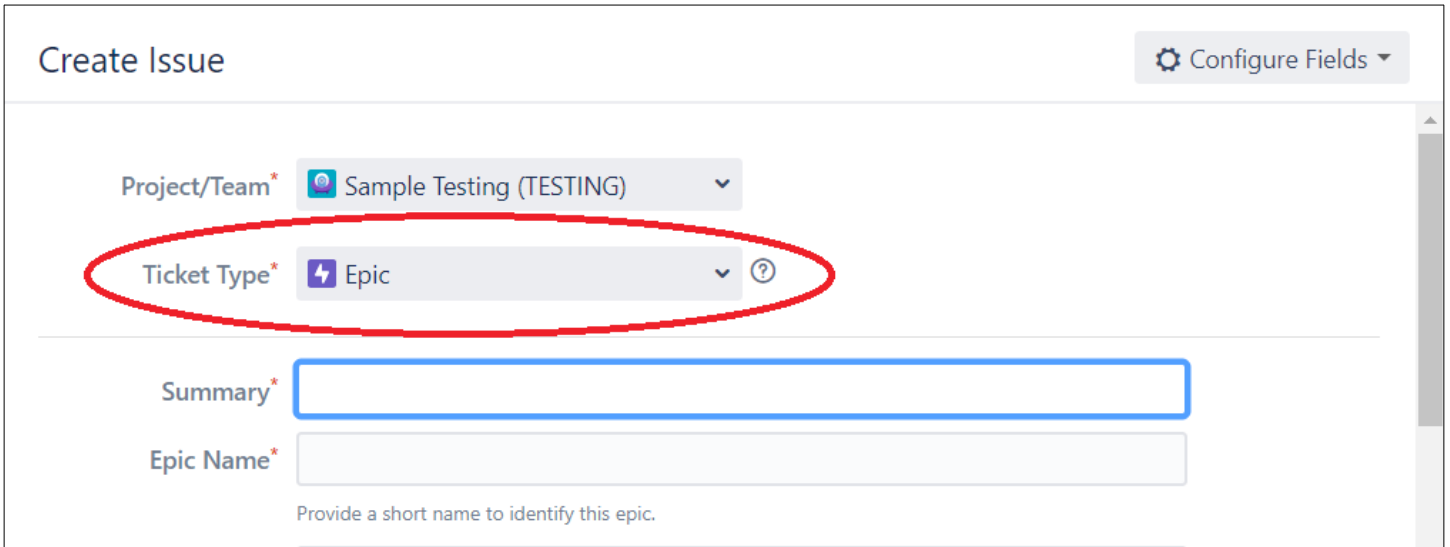
The **Create Issue** window should appear:
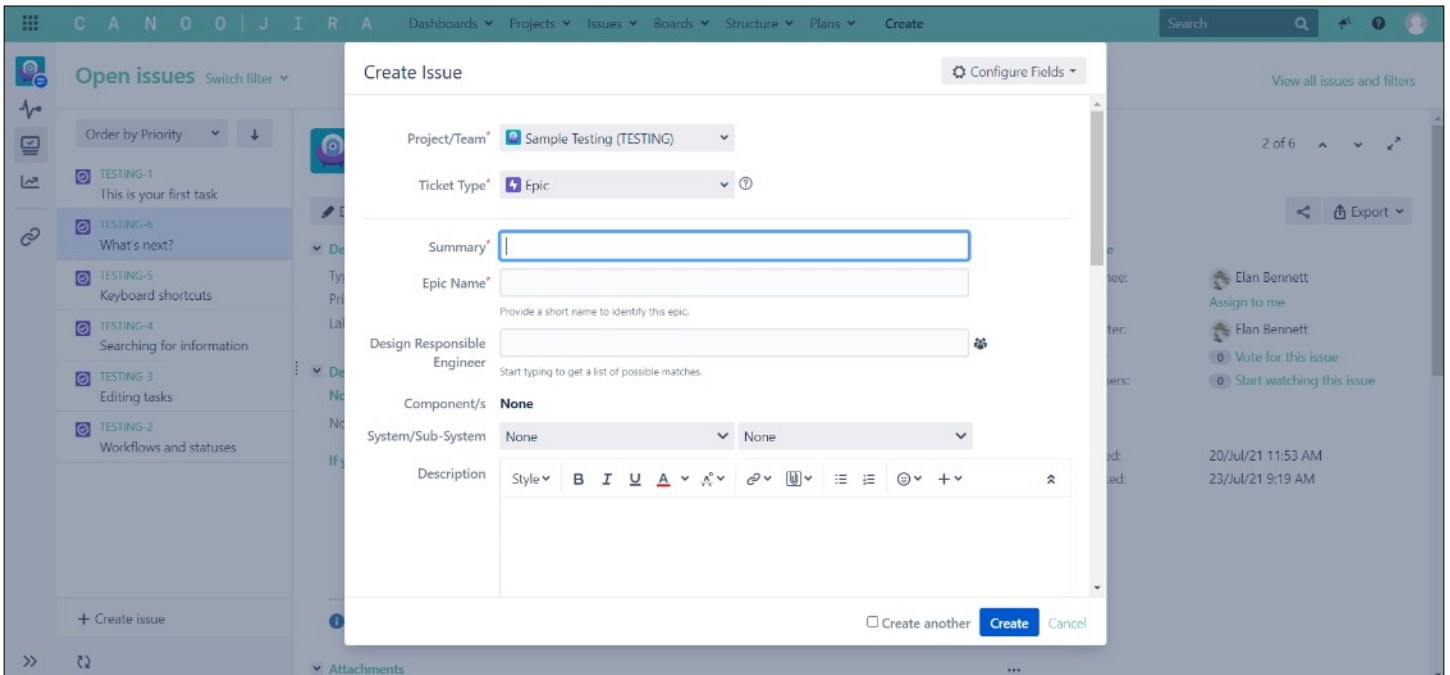
2. In the **Create Issue** window, make sure that the **Sample Testing** project is shown as the Project/Team:

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

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

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

"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'.

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

[Your Name] has a great idea for the lifestyle vehicle: a wrap that makes it look like the Mystery Machine in the Scooby Doo cartoon.

6. In the window, scroll down to view the additional information that can be added about the issue.

7. Scroll up to the top of the window to view the different categories of information that can be added about the issue.

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

9. Click **CAPA**.

The screen should look like this:

10. Click **Impact**.

The screen should look like this:

11. Click **Timing**.

The screen should look like this:

12. Click **People**.

The screen should look like this:

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

Type your name in the box.

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

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 ▾ ⑦

General*   Categorization   CAPA   Impact   Timing   **People**

Design Responsible Engineer   Chris.Charuhas 👥
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 ▾ ⑦

General* Categorization CAPA Impact Timing **People**

Design Responsible Engineer
Chris.Charuhas 👥
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

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16. Refresh the page in the browser, then click on the issue.
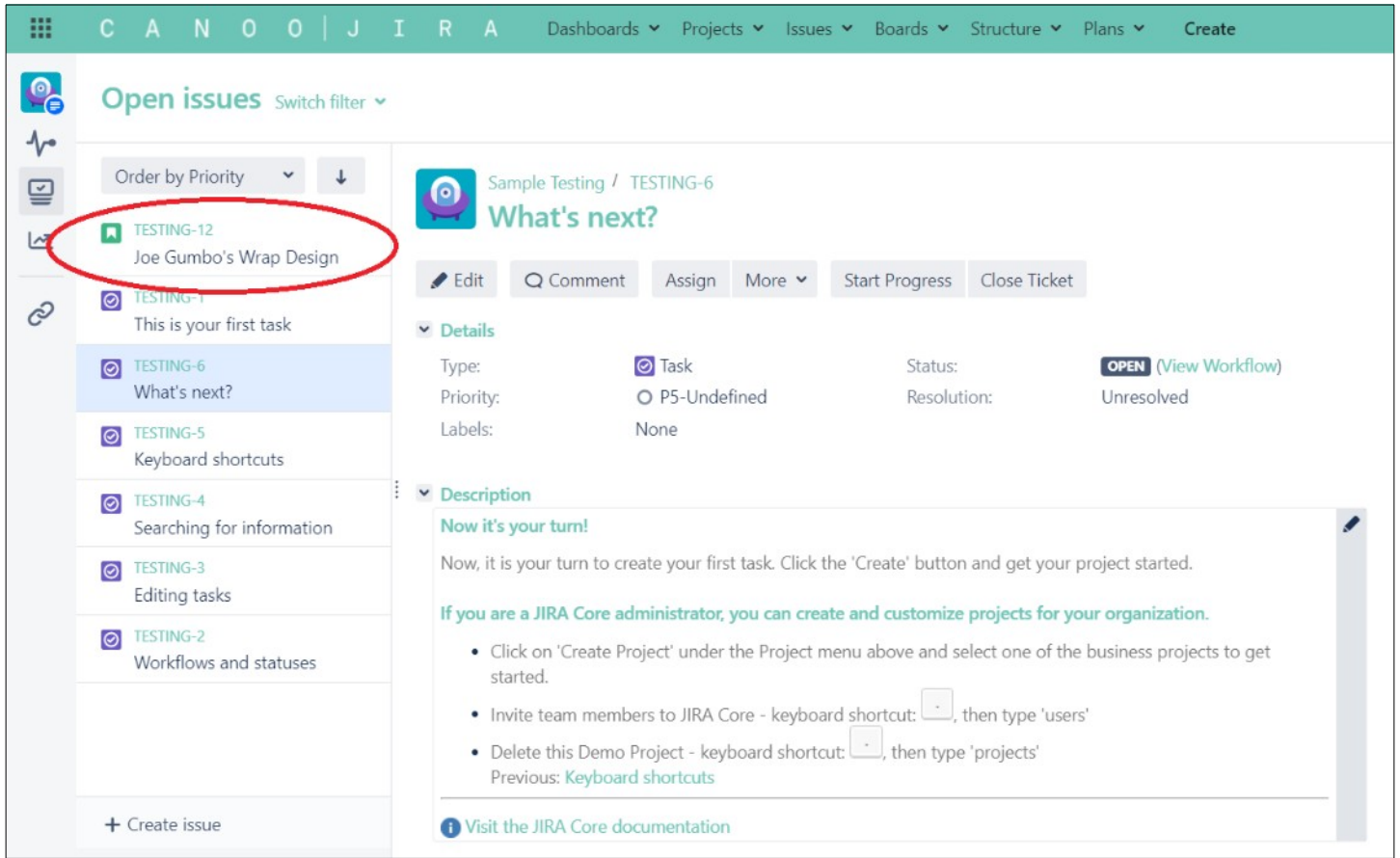
The screen should look like this:
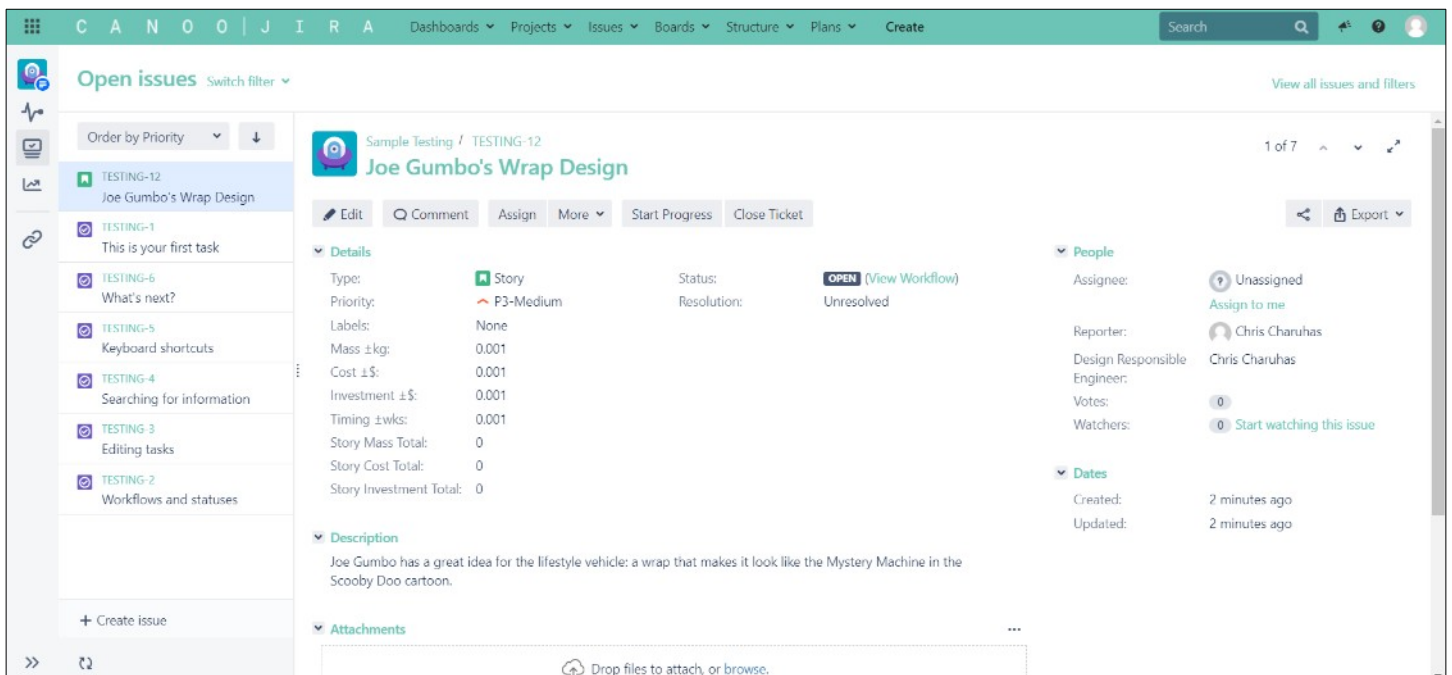
Edit Issue Information

Edit Details

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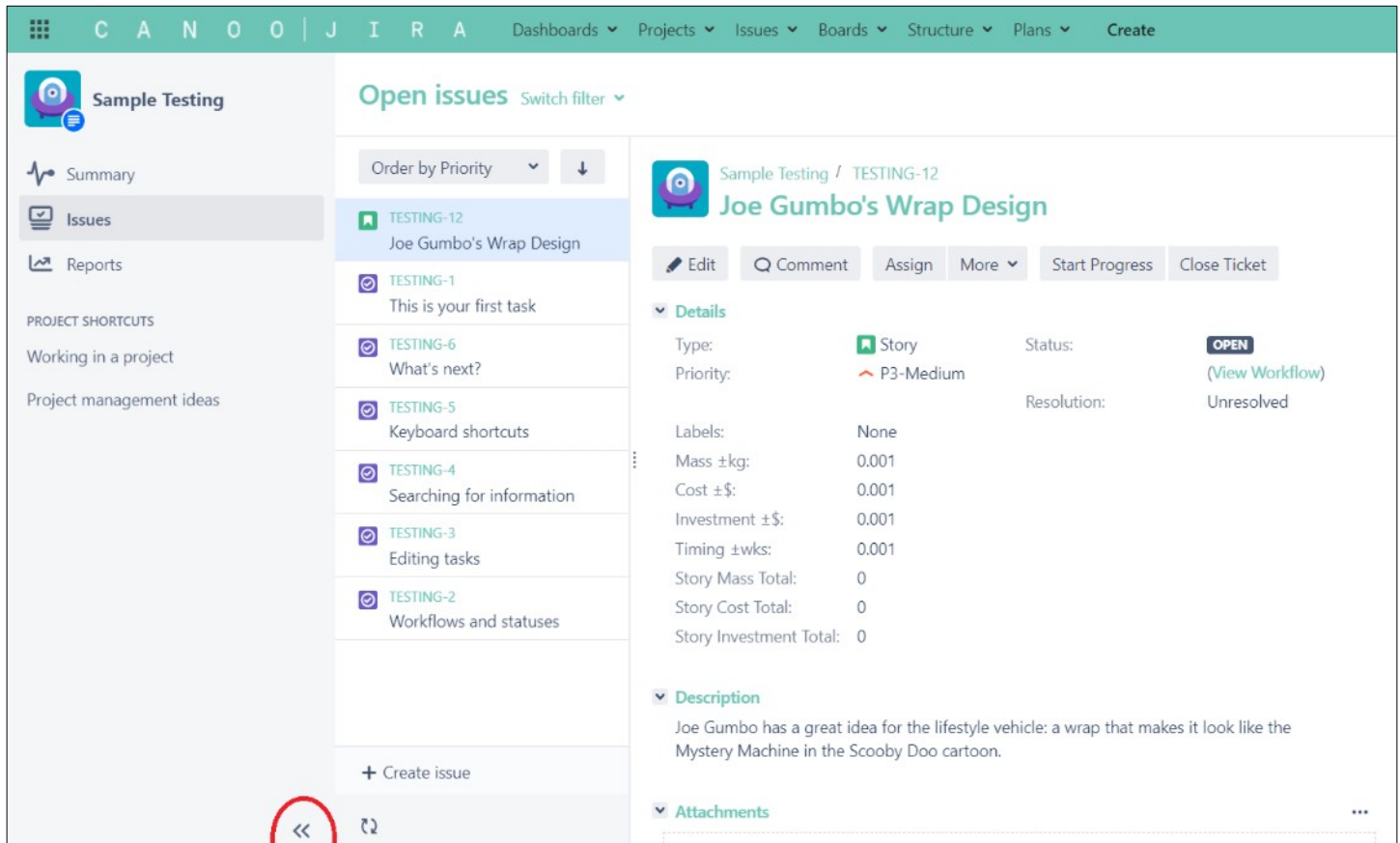
This should collapse the sidebar.

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.

The issue should now look like this:

Edit Assignee

1. Click the **Assign** button.

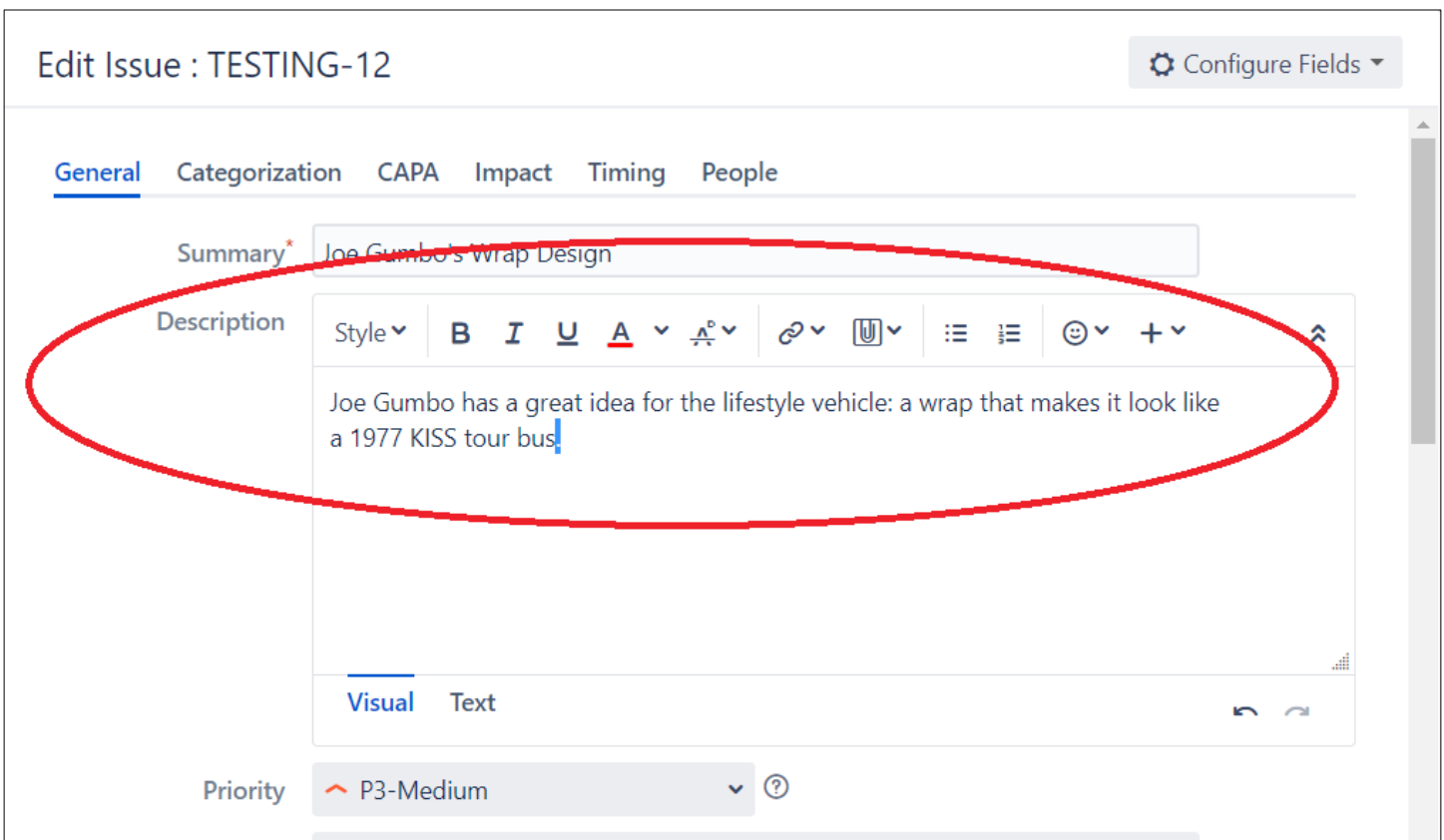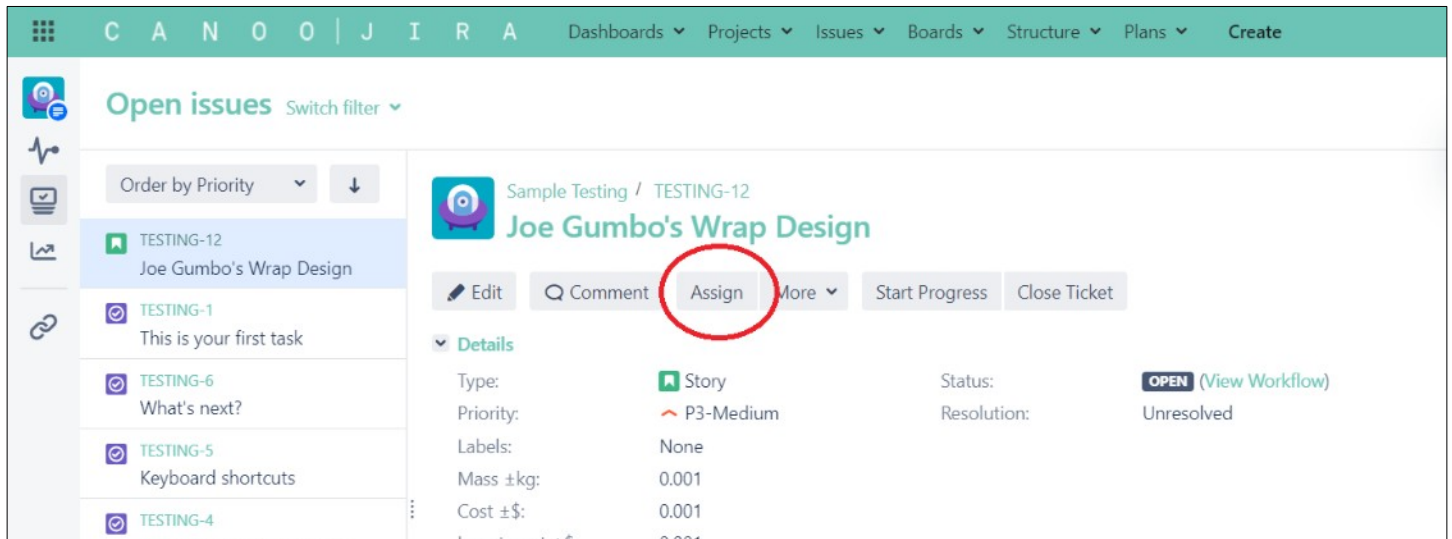**2.** When the **Assign** window appears, type your name in the **Assignee** box.

3. When the menu appears, click your name.

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

4. Click the **Assign** button.

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

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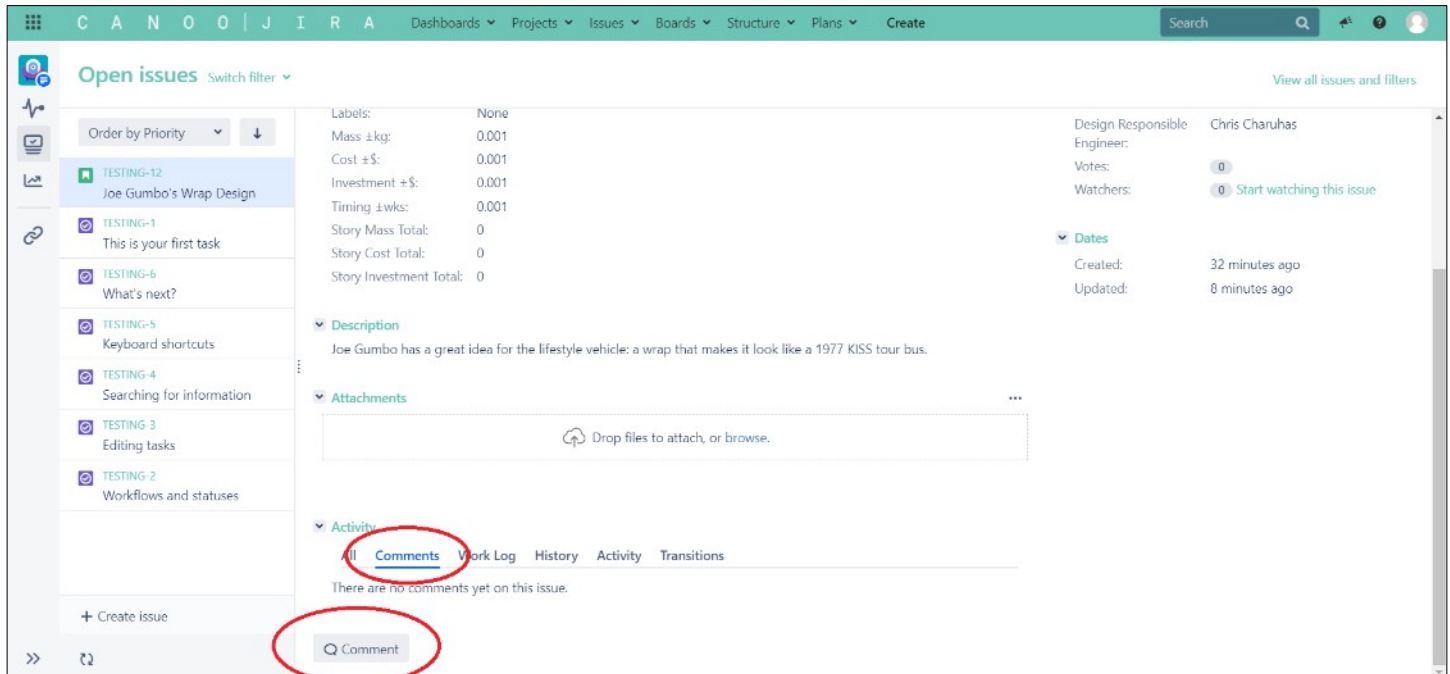
3. In the **Comment** text box, type:

The KISS tour bus wrap should feature pics of all four members of the band.
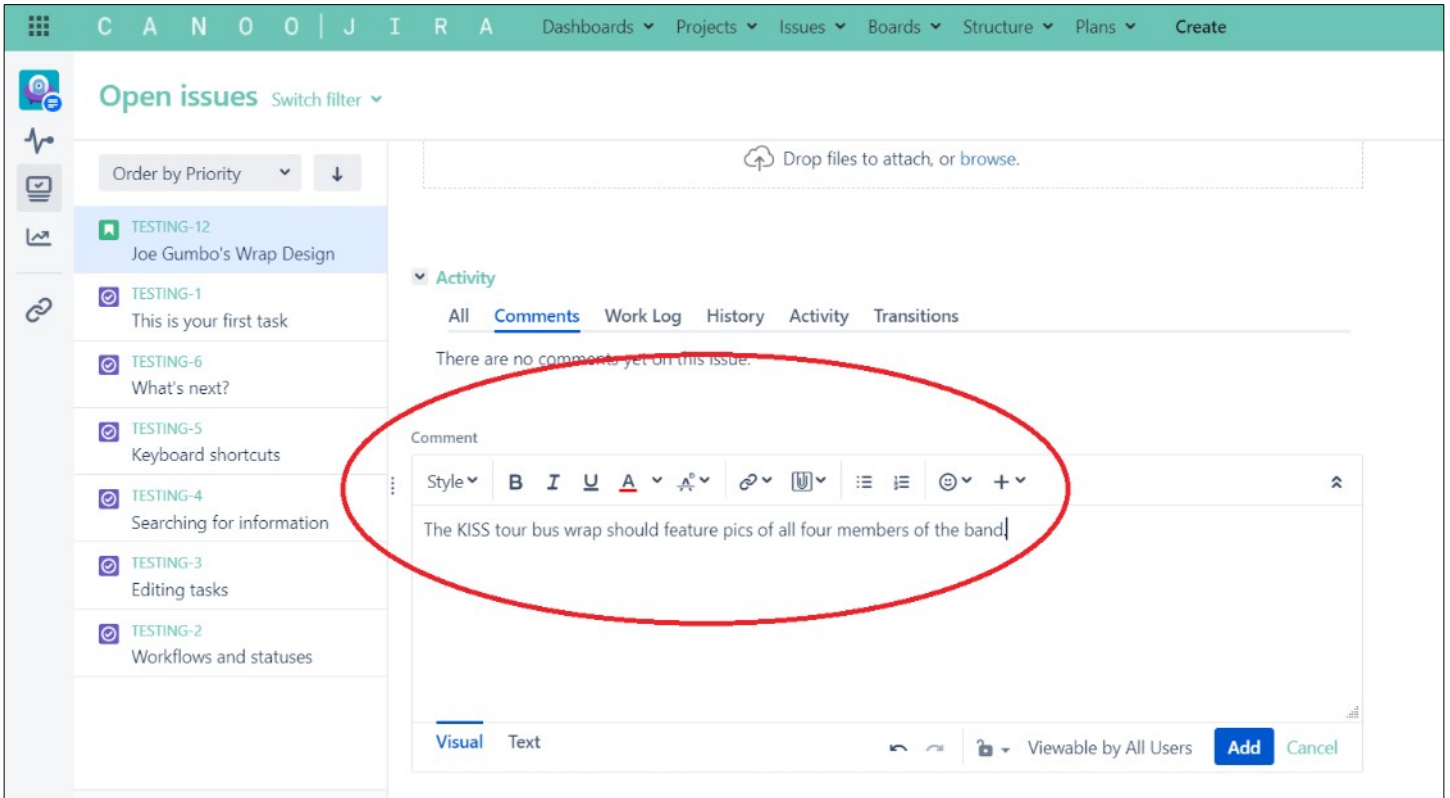
4. Click the **Add** button.
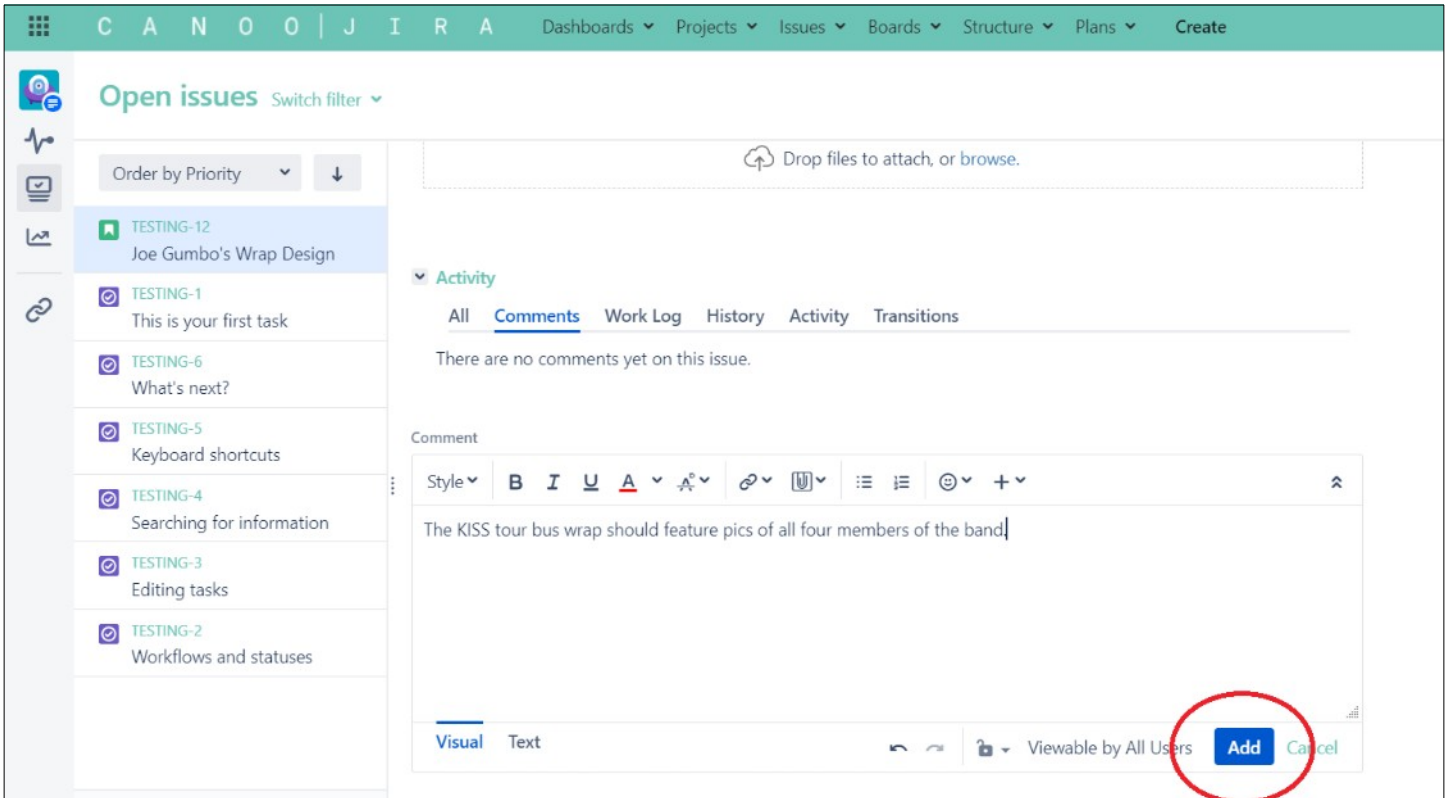
The comment should now appear on the screen:
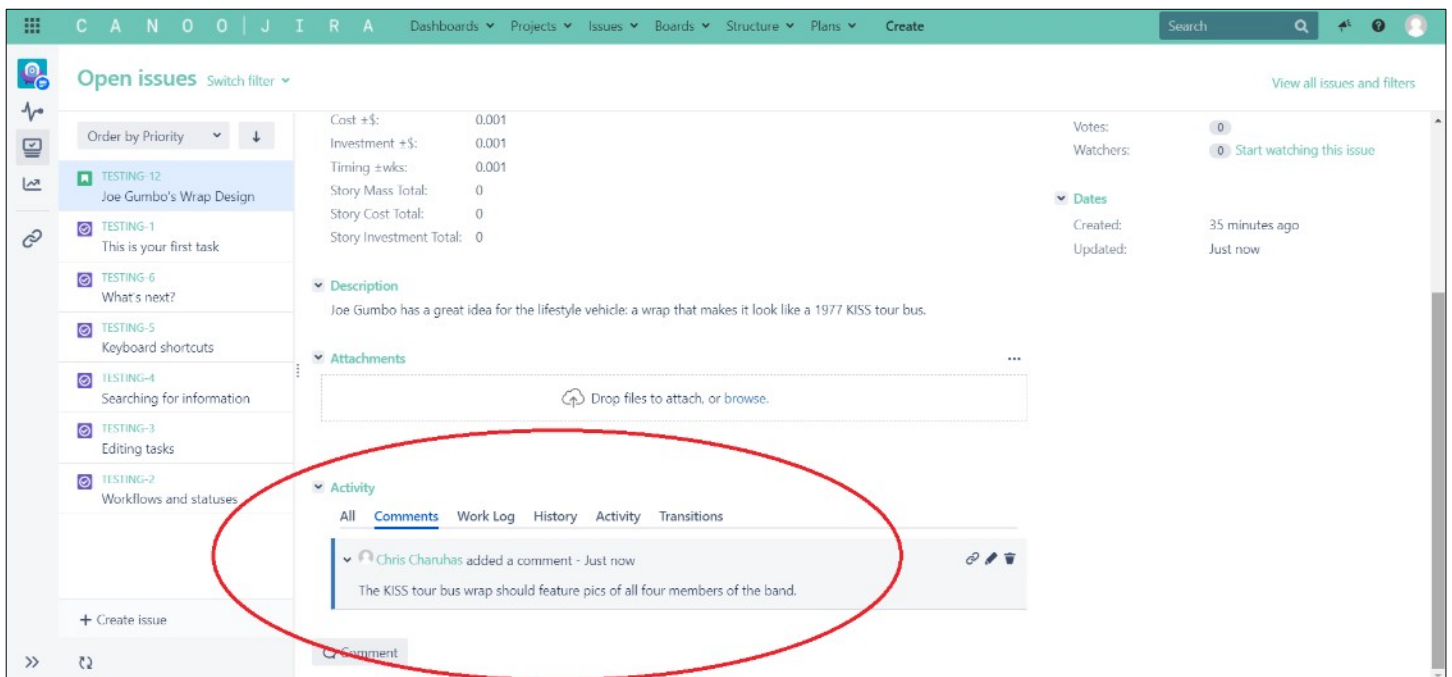
Change Workflow Status

1. Scroll to the top of the issue screen.

2. In the **Details** area, next to **Status**, click **View Workflow**.

The **Basic Workflow** window should appear, showing the workflow steps for this issue: Open, In Progress, and Closed.
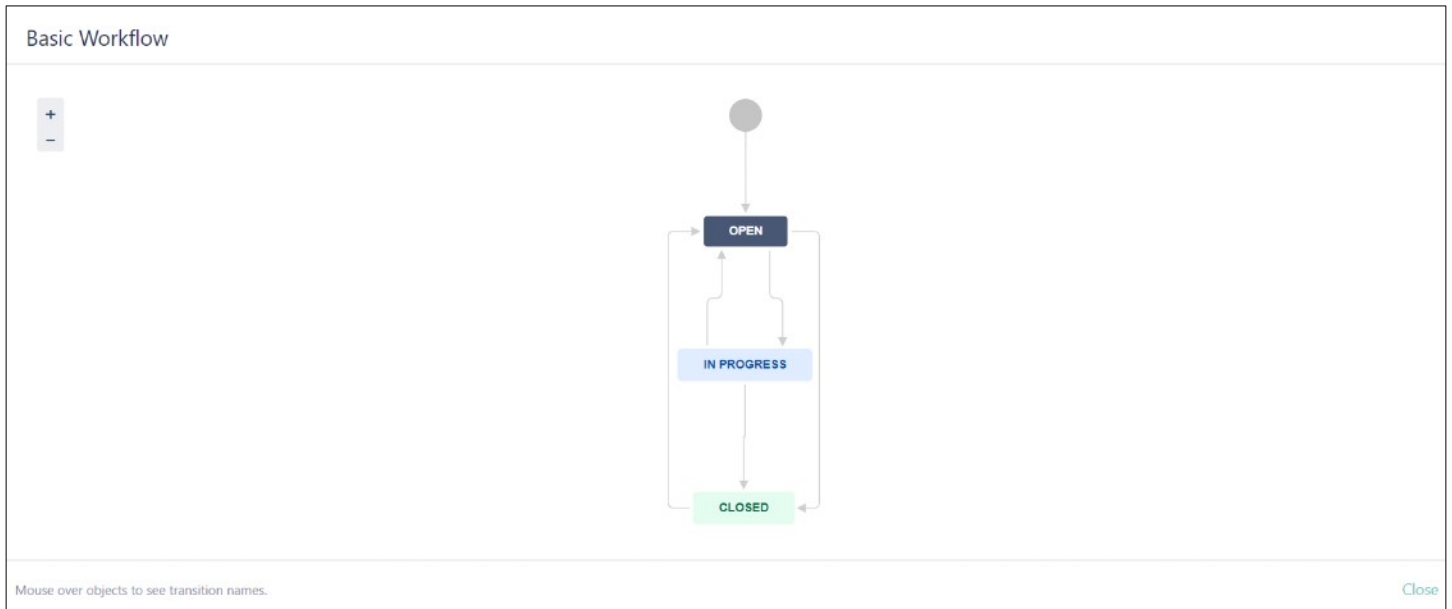
3. Click the **Close** link.
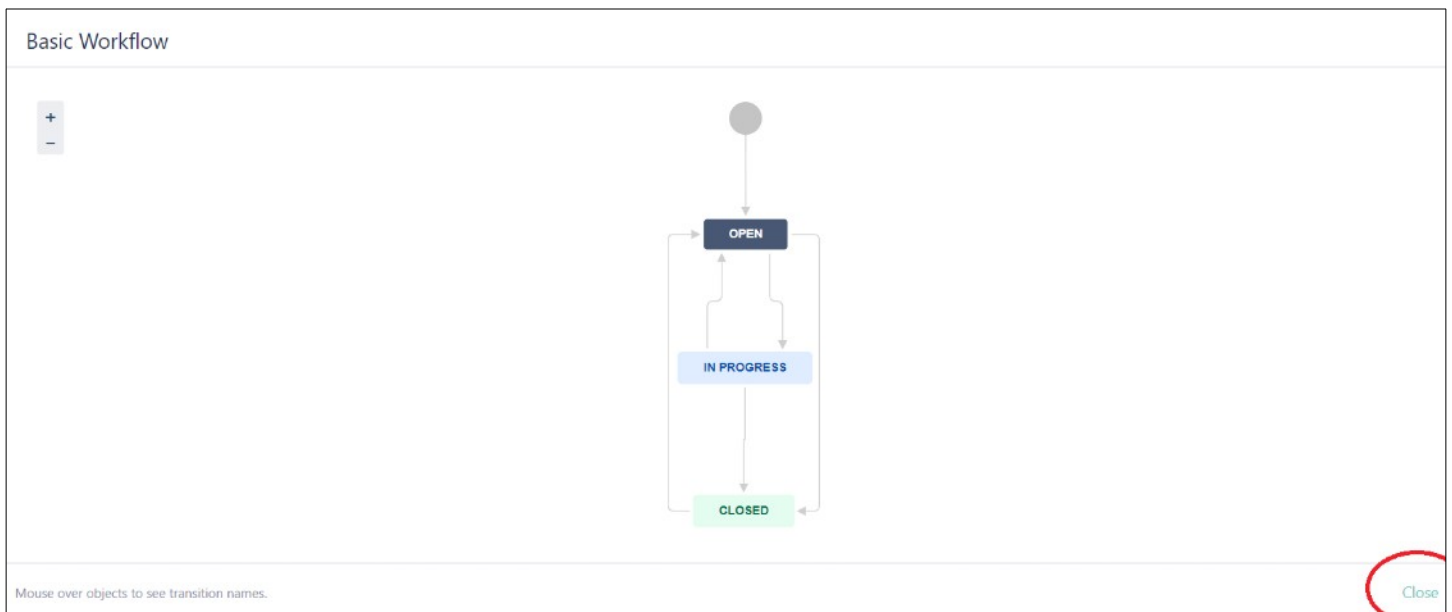
4. Click the **Start Progress** button.

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.

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

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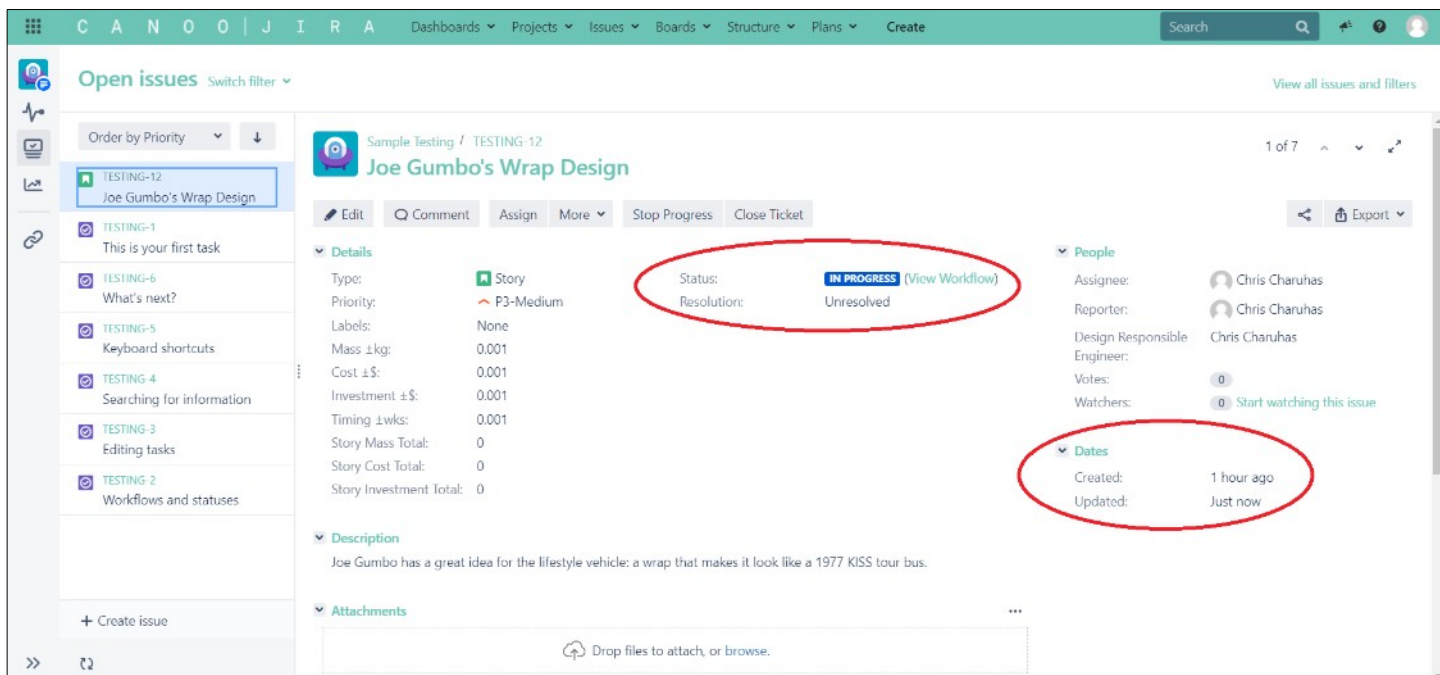
7. Click the **Close Ticket** button.
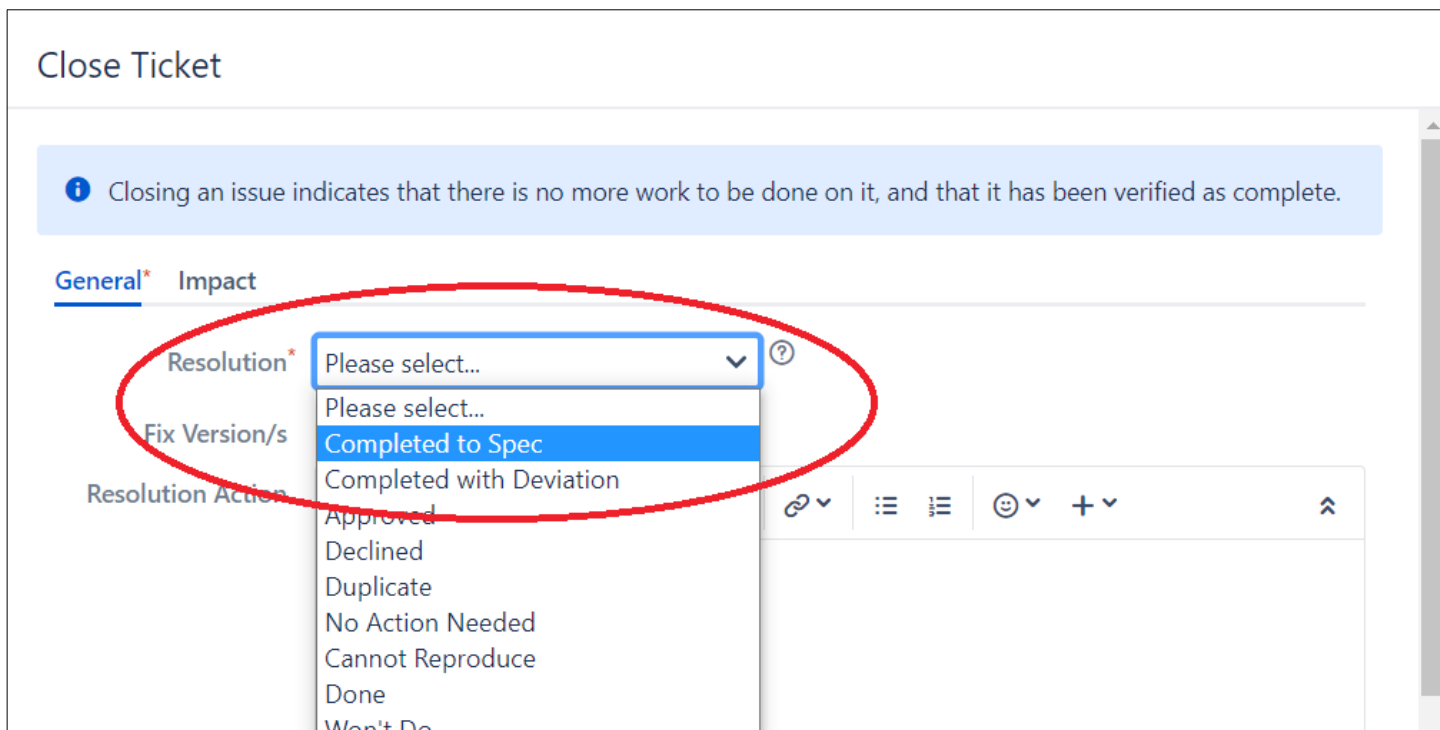
8. When the **Close Ticket** window appears, click in the **Resolution** box.

When the menu appears, click **Completed to Spec**.
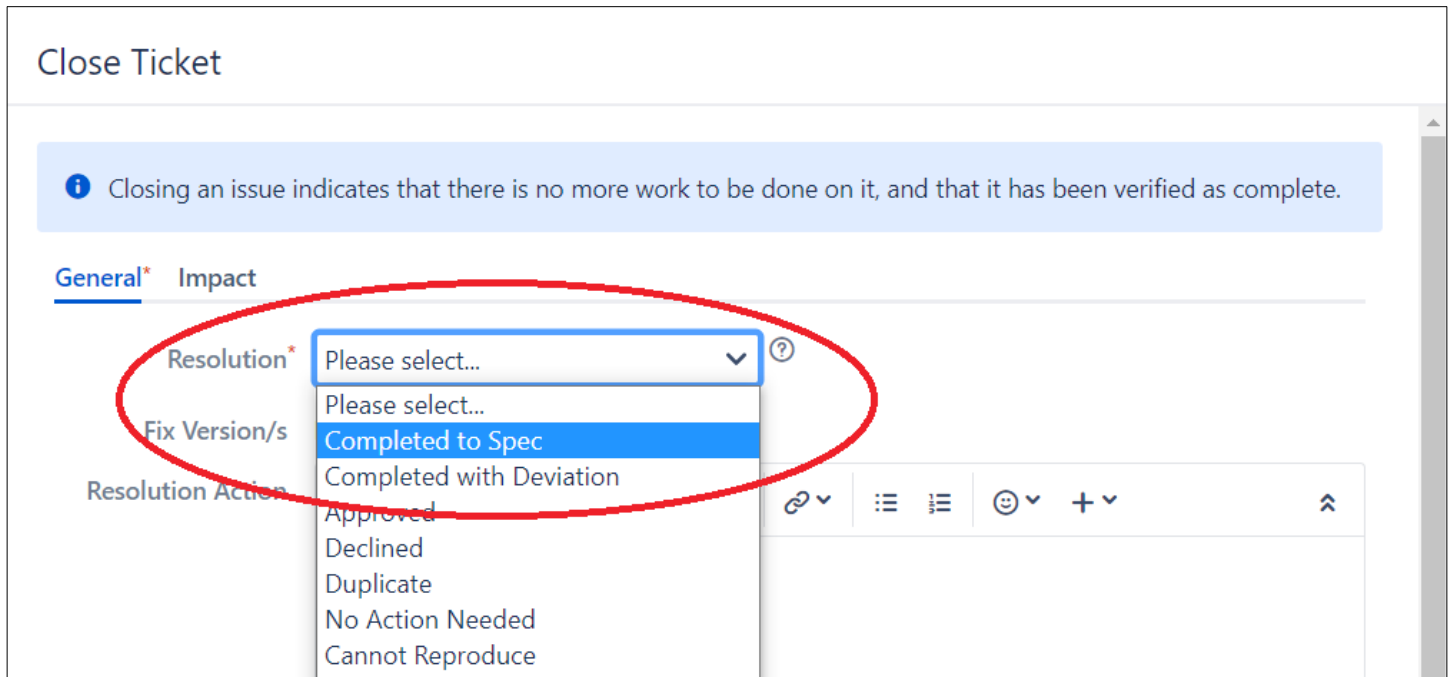
9. In the **Resolution action** text box, type:

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

10. Click the **Close Ticket** button.

Close Ticket

ⓘ Closing an issue indicates that there is no more work to be done on it, and that it has been verified as complete.

General* Impact

Resolution*   Completed to Spec   ⌄   ?

Fix Version/s   **None**

Resolution Action

Style ⌄   **B**   *I*   U   A ⌄   A° ⌄   ⌀ ⌄   ☰   ☰   ☺ ⌄   + ⌄   ⌃

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

Visual   Text

What action was performed to resolve this ticket?

Attachment   ☁ Drop files to attach, or browse.

Close Ticket   Cancel

The Status of the issue should now be Closed:

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

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

Re-Open

Assignee   Chris Charuhas

Comment   Style ∨   **B** *I* U̲ A ∨ A᷂ ∨   ⛓ ∨   ☰ ☰   ☺ ∨ ＋ ∨   ≫

Visual   Text   ↶ ↷   🔓 ▾   Viewable by All Users

Re-Open   Cancel

Link Issues Together

1. In the main issue screen, click the **More** button.
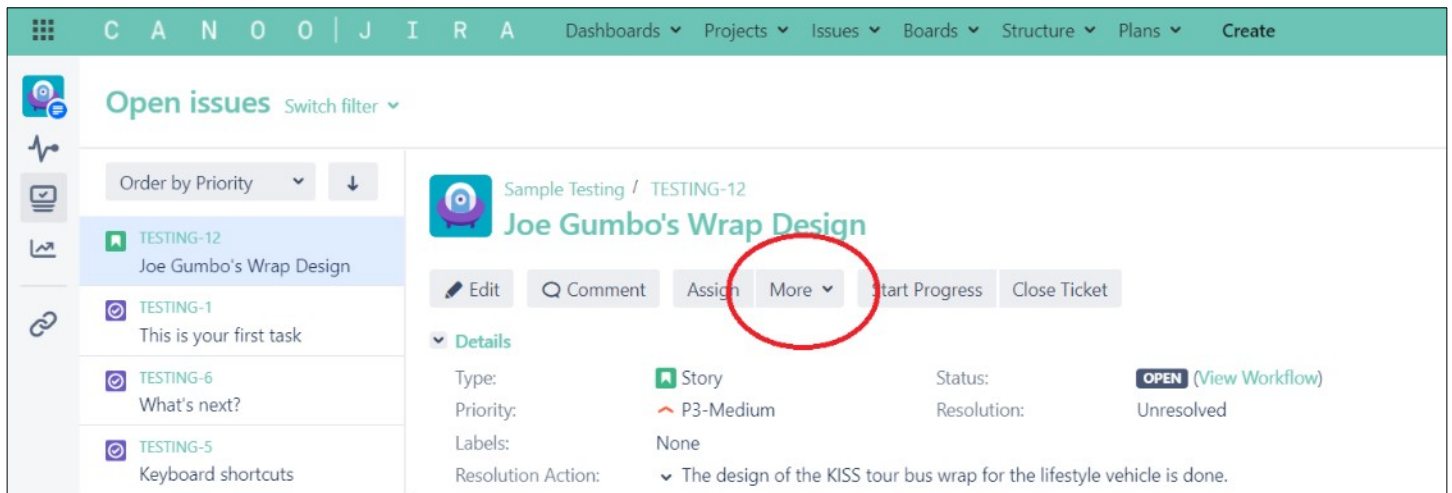
2. When the menu appears, click **Link**.
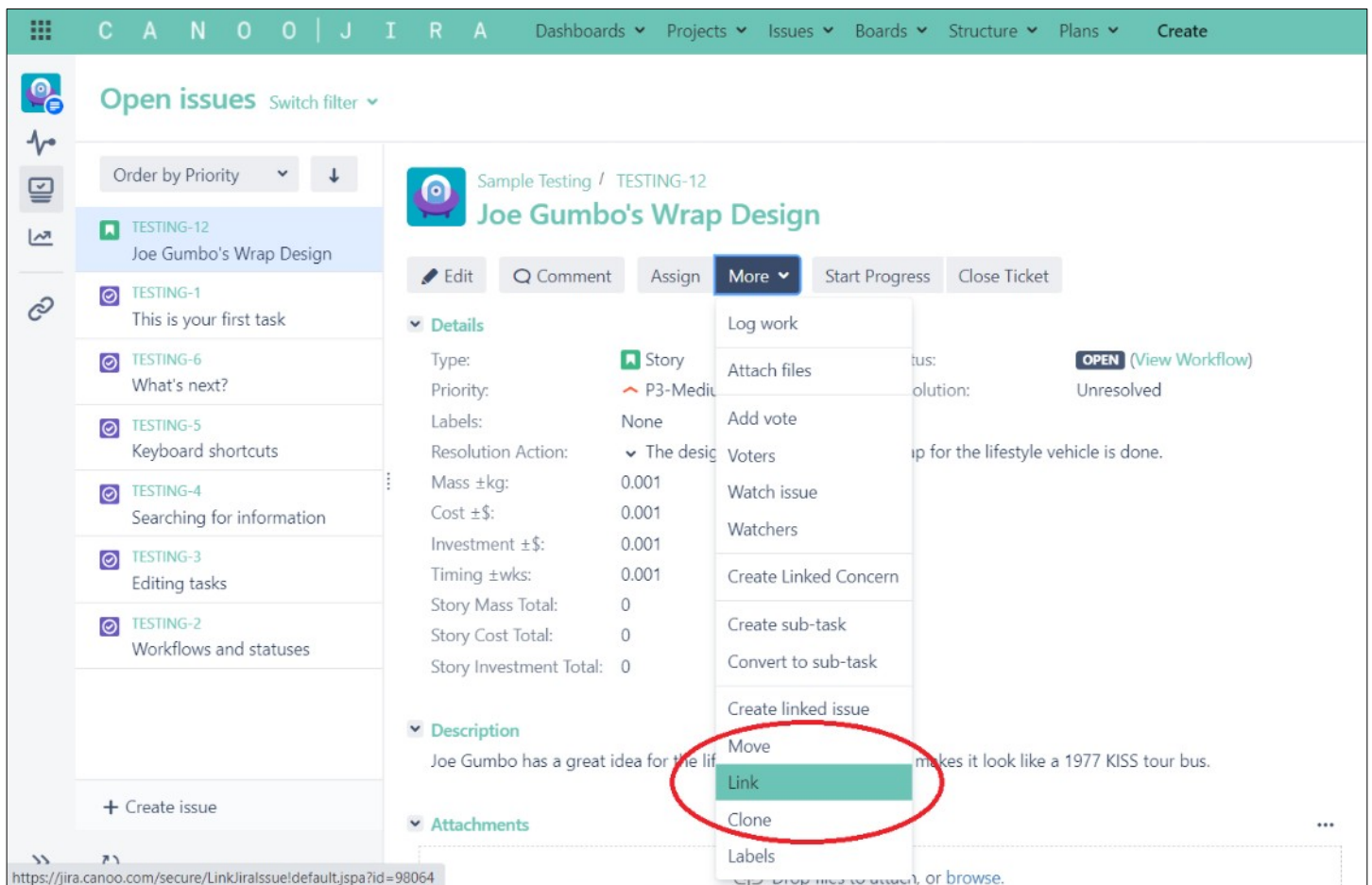
3. When the **Link** window appears, click the **This issue** box.

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.

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
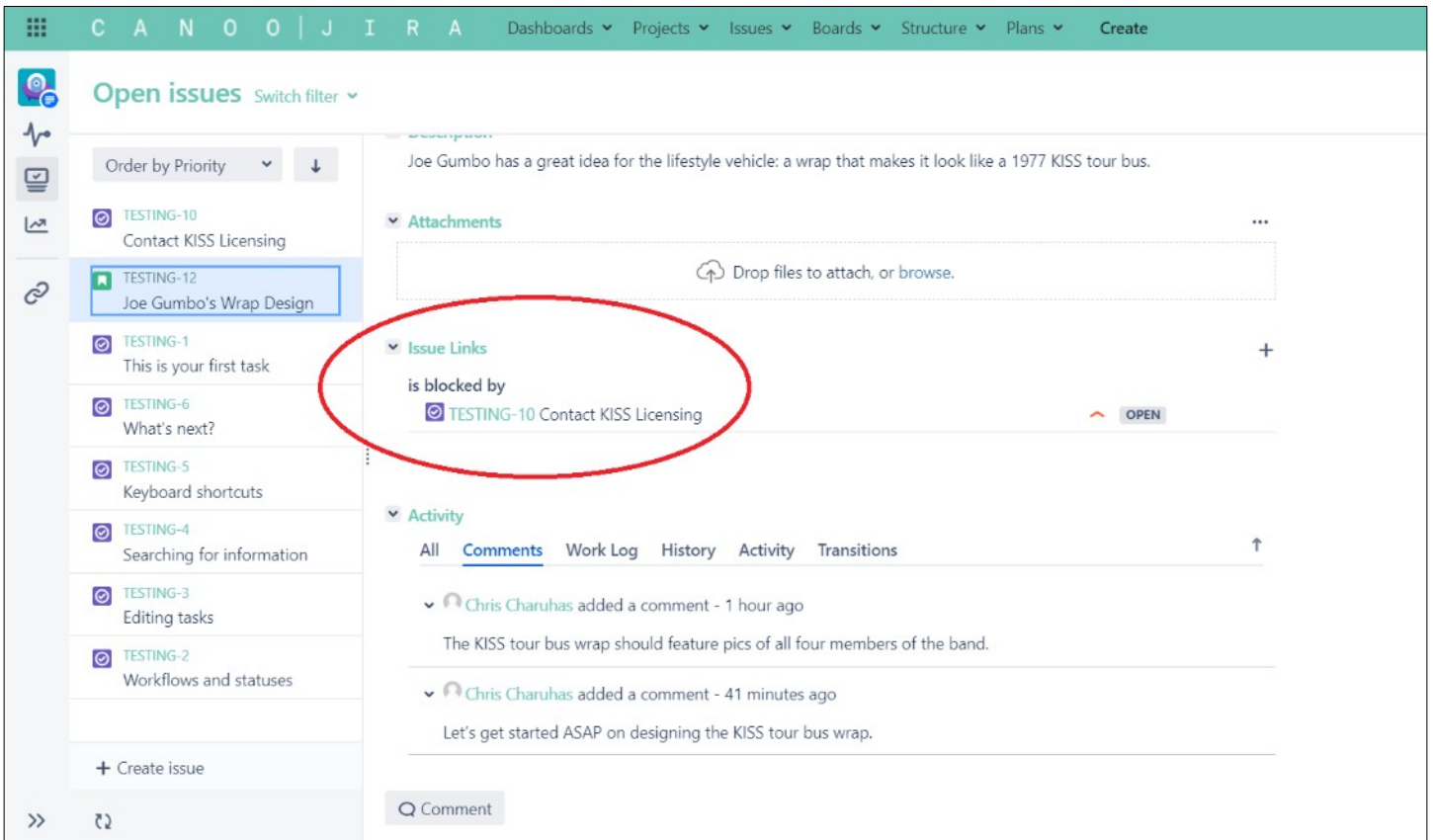
Link to an Epic

1. In the main issue screen, click the **Edit** button.
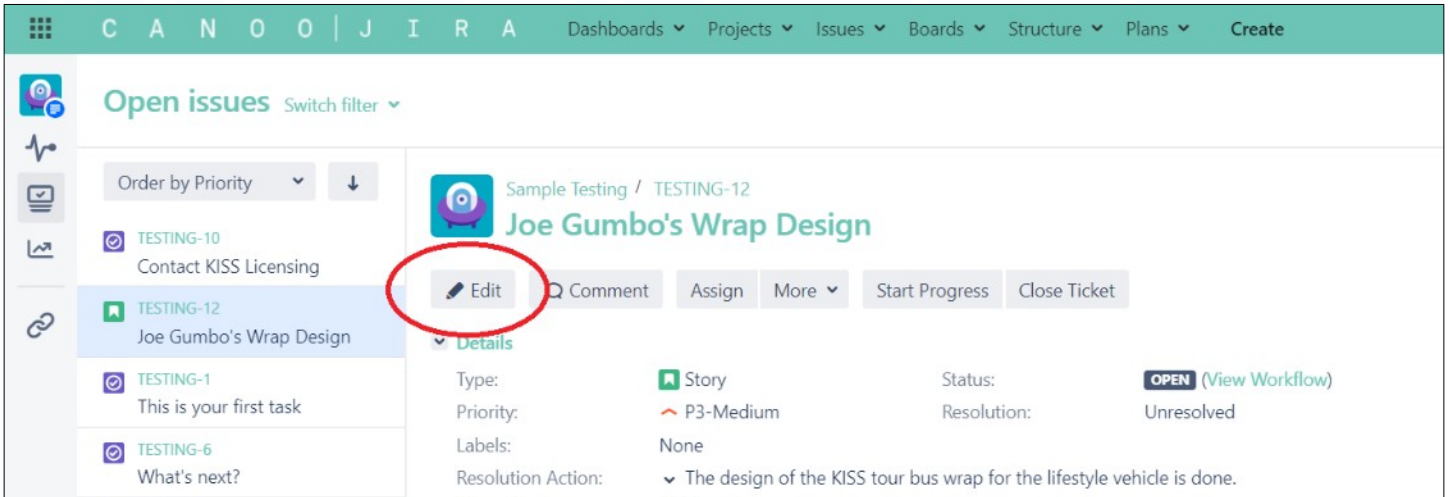
2. When the **Edit Issue** window appears, click the **Epic Link** box.
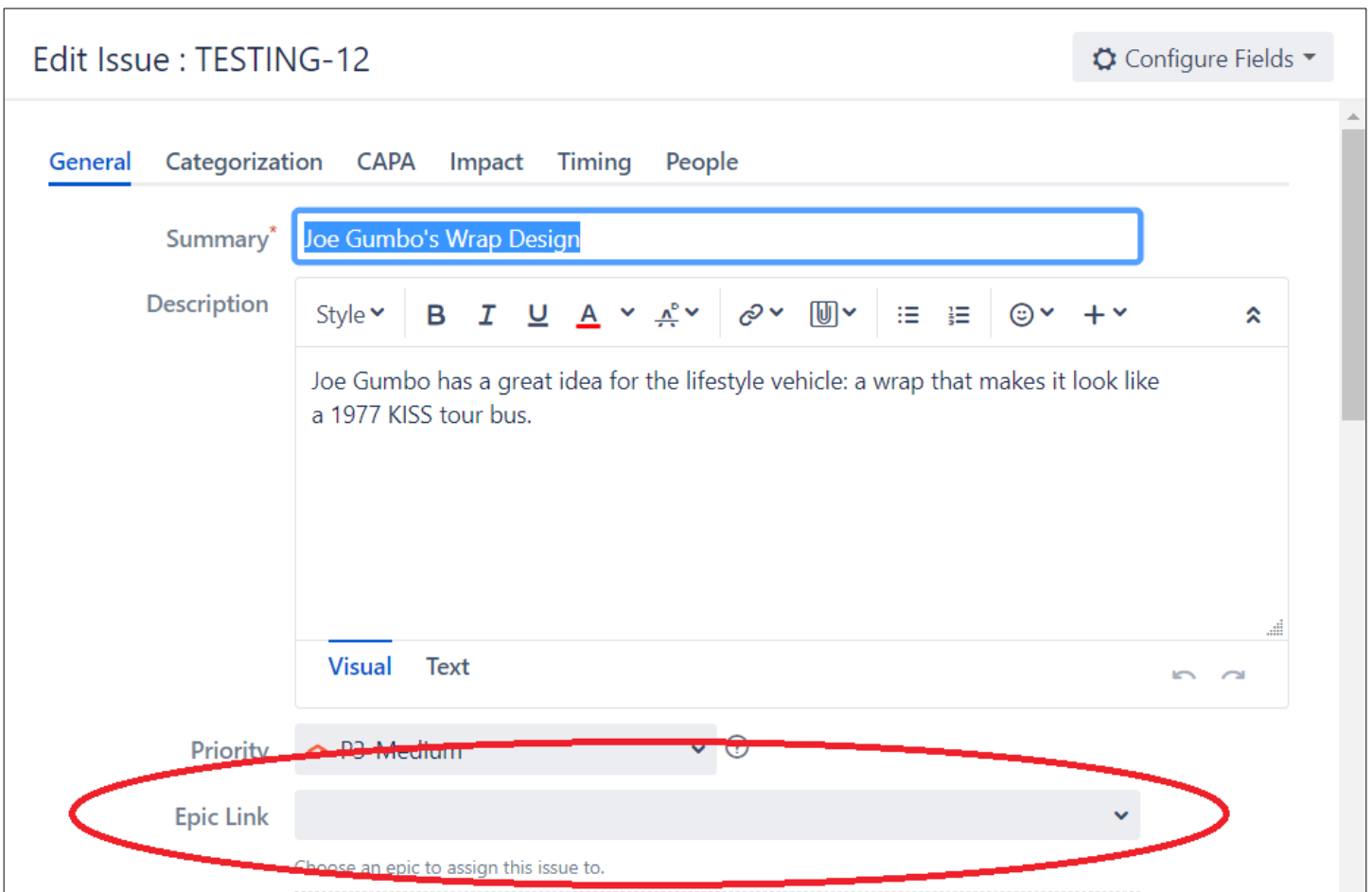
3. In the box, type:

Create Wrap Designs

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

4. 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 ▾ A° ▾   ⌀ ▾   U ▾   ☰ ☰   ☺ ▾   + ▾   ⌃

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   ▾   ⑦

Epic Link   Create Wrap Designs   ▾
Choose an epic to assign this issue to.

Attachment   ☁ Drop files to attach, or browse.

Next Steps

                                            Update   Cancel

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

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

It will take you to the epic:
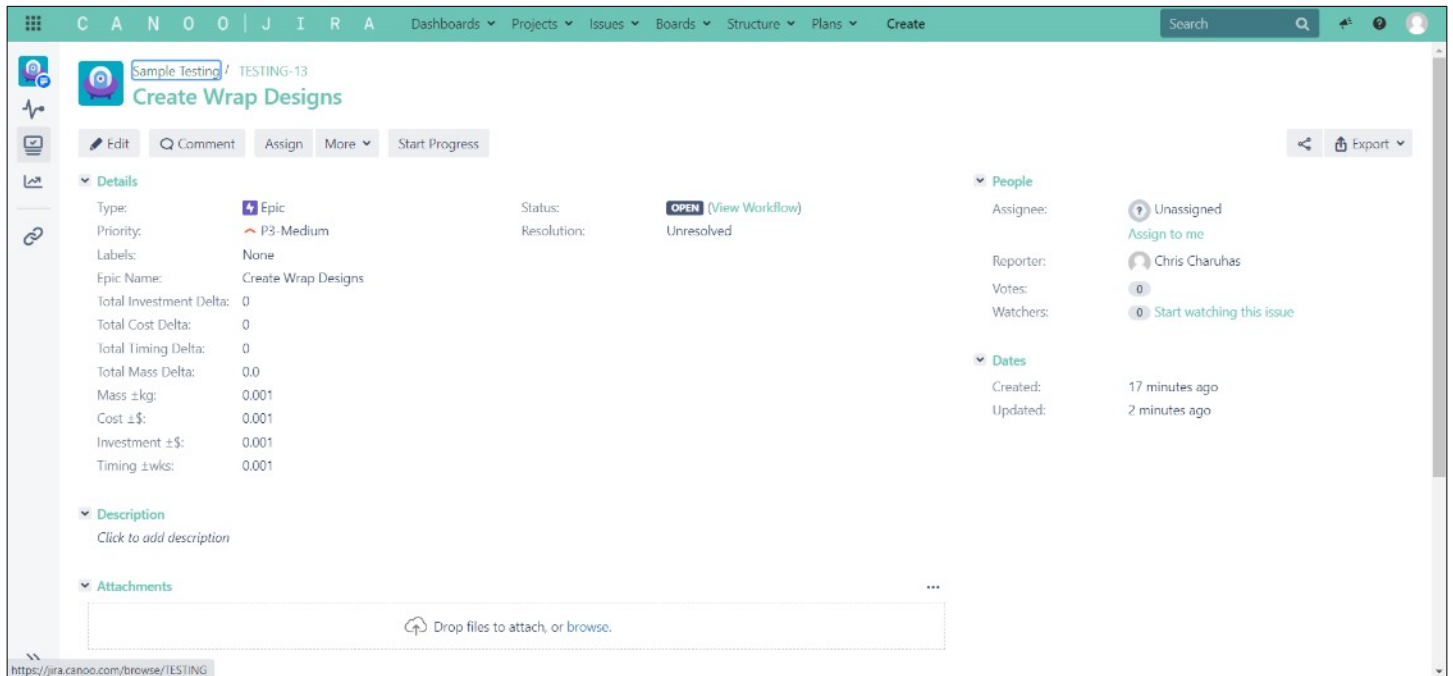
6. Scroll down to the **Issues in Epic** section, then click the **[Your Name]'s Wrap Design** link.
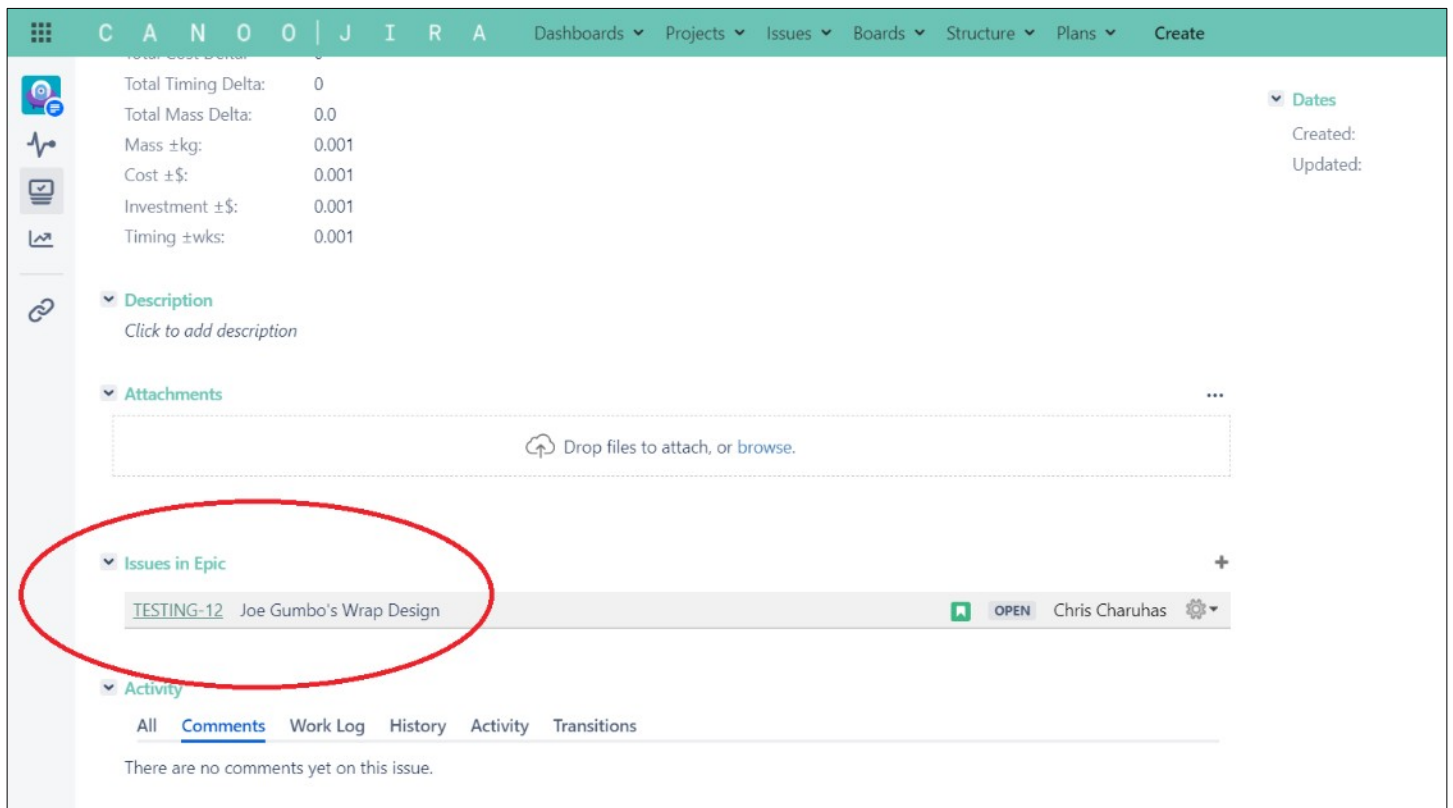
It should take you back to the **[Your Name]'s Wrap Design** issue.

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**.
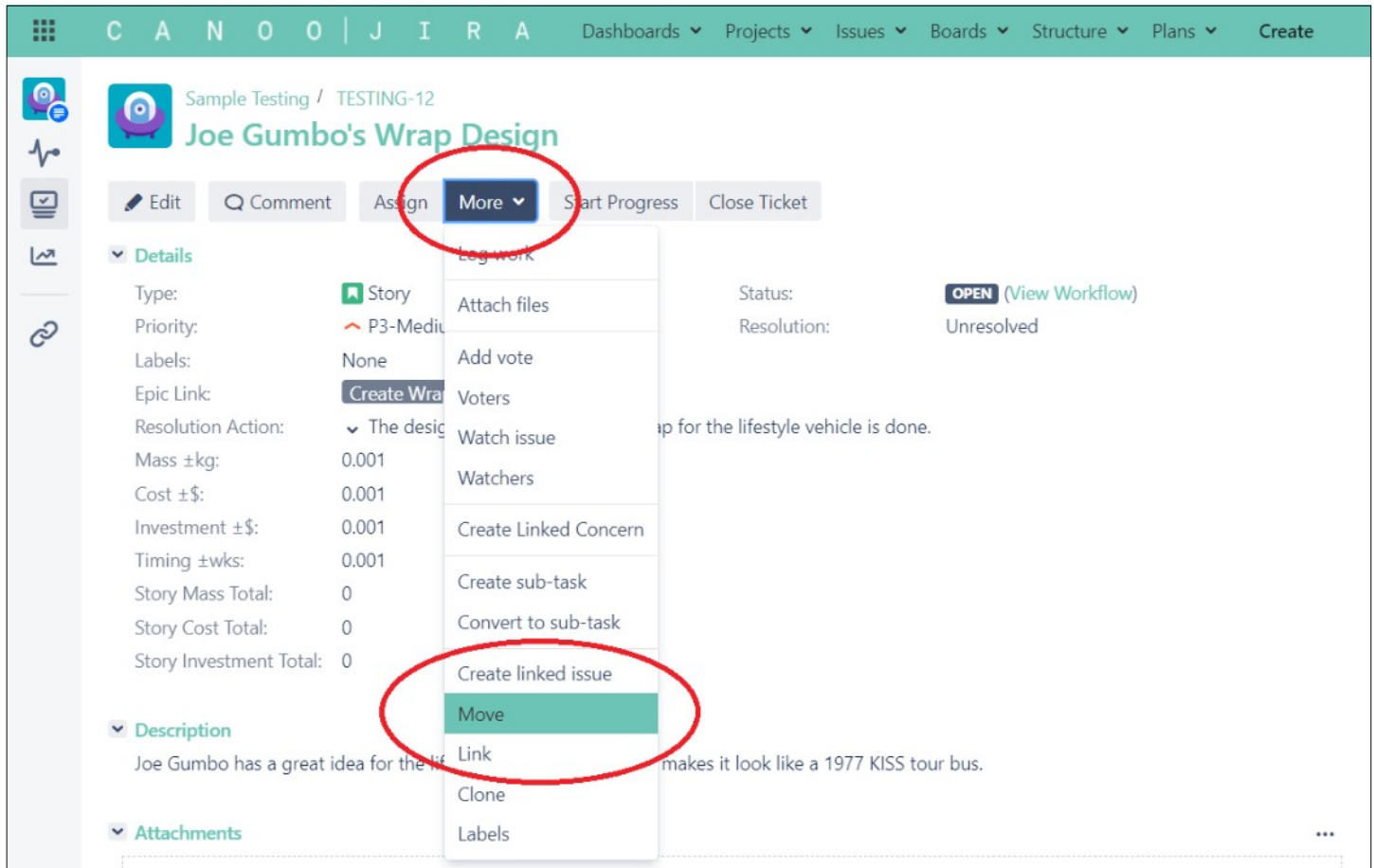
The **Move Issue** screen should appear:
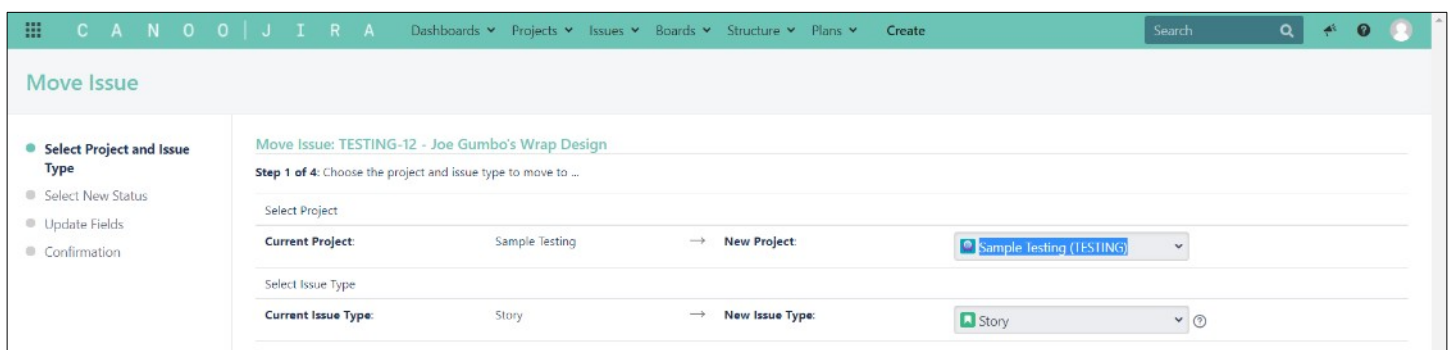
Here, in the **Select Project** area, you can move an issue to a different project.
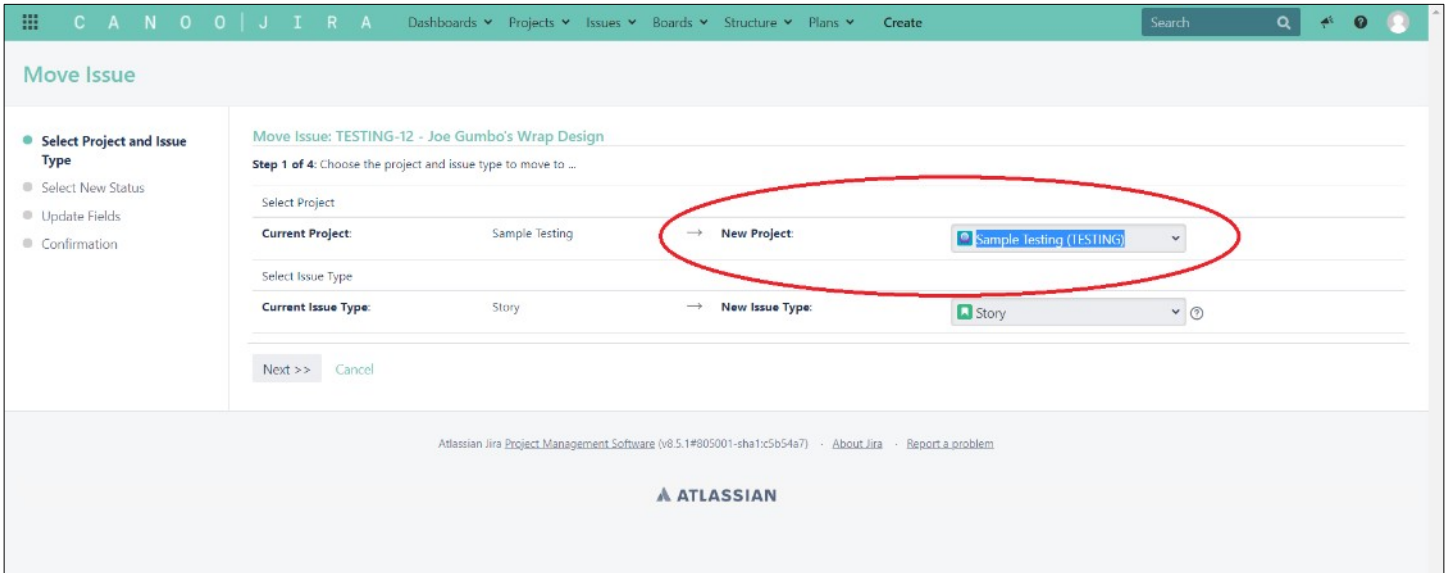
2. In the **Select Issue Type** area, click the **New Issue Type** box.

When the menu appears, click **Task**.
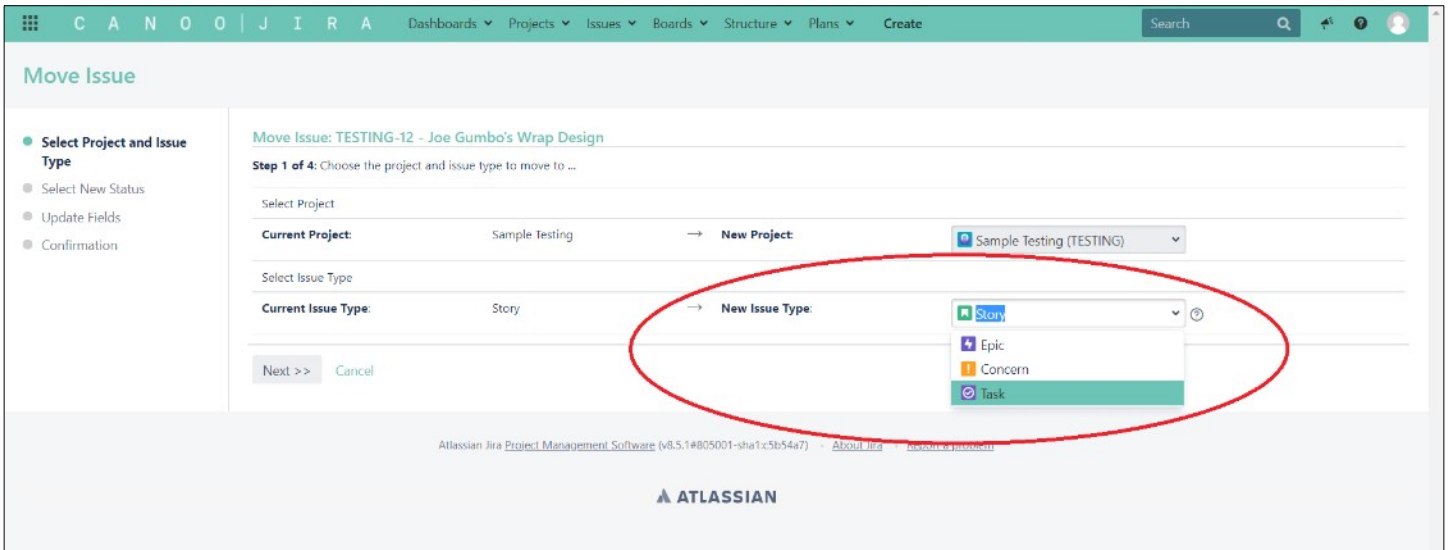
3. Click the **Next** button.
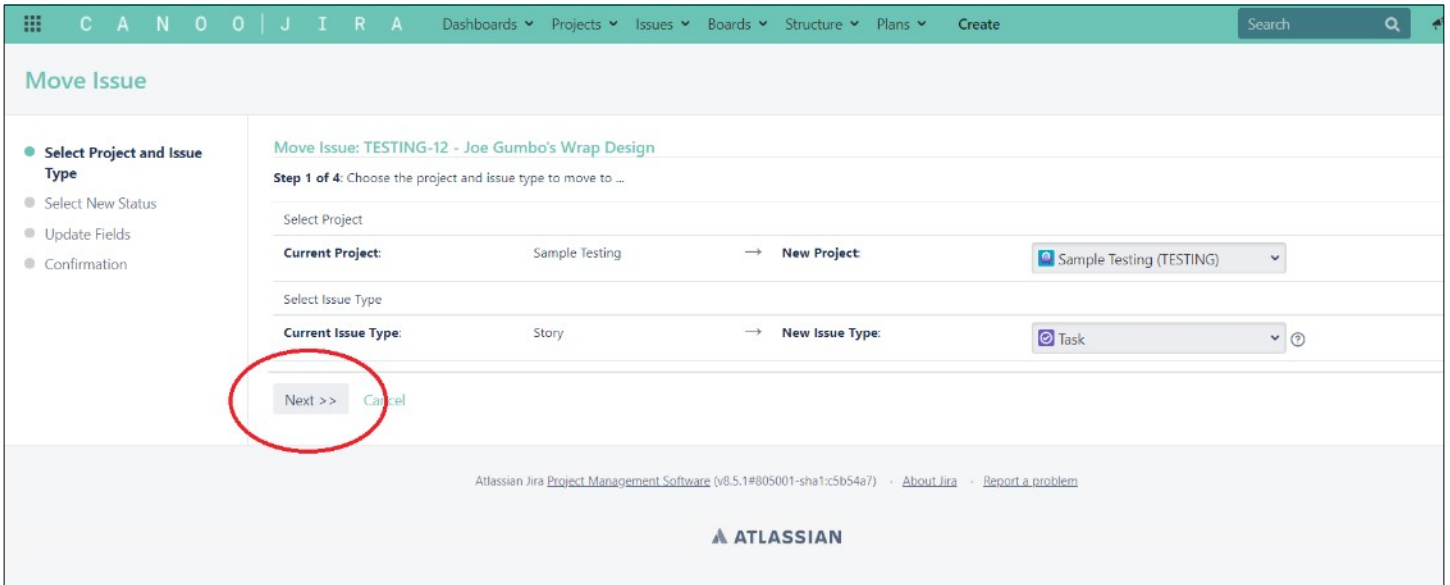
4. Under **Move Issue: Update Fields**, leave everything as-is, then click the **Next** button.
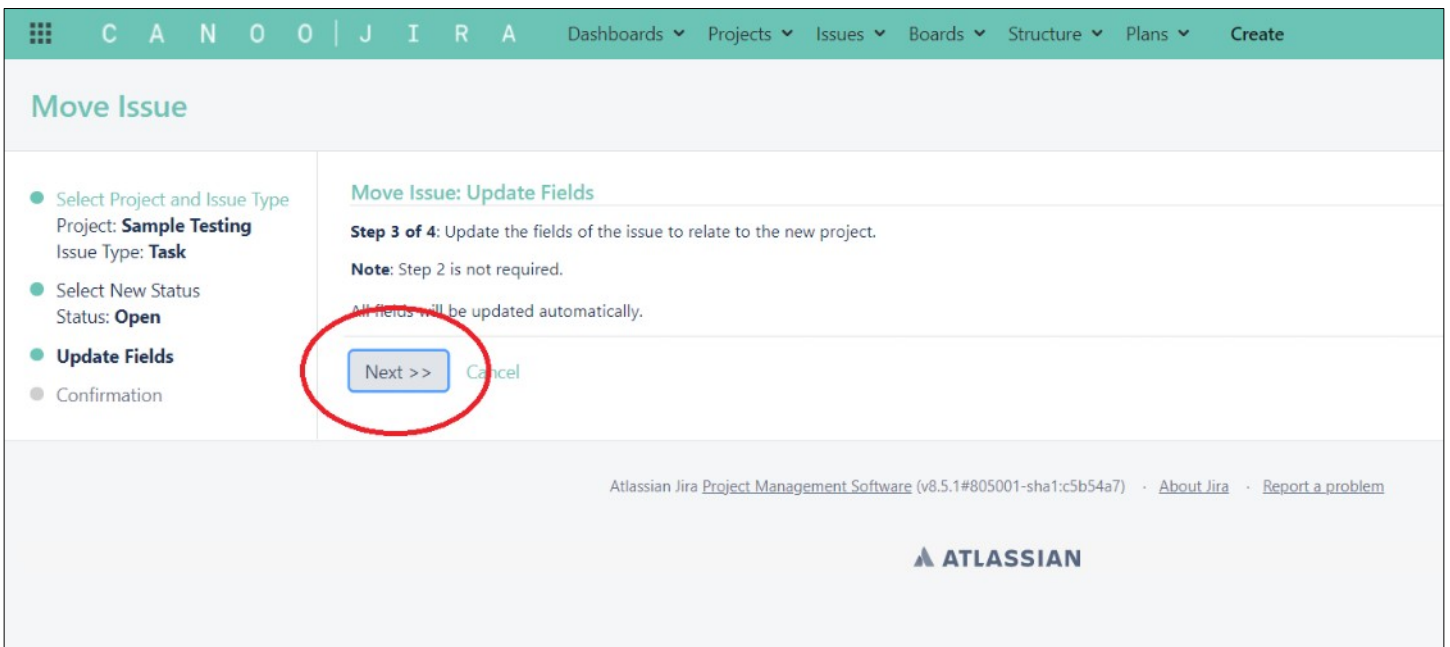
5. Under **Move Issue: Confirm**, click the **Cancel** link.

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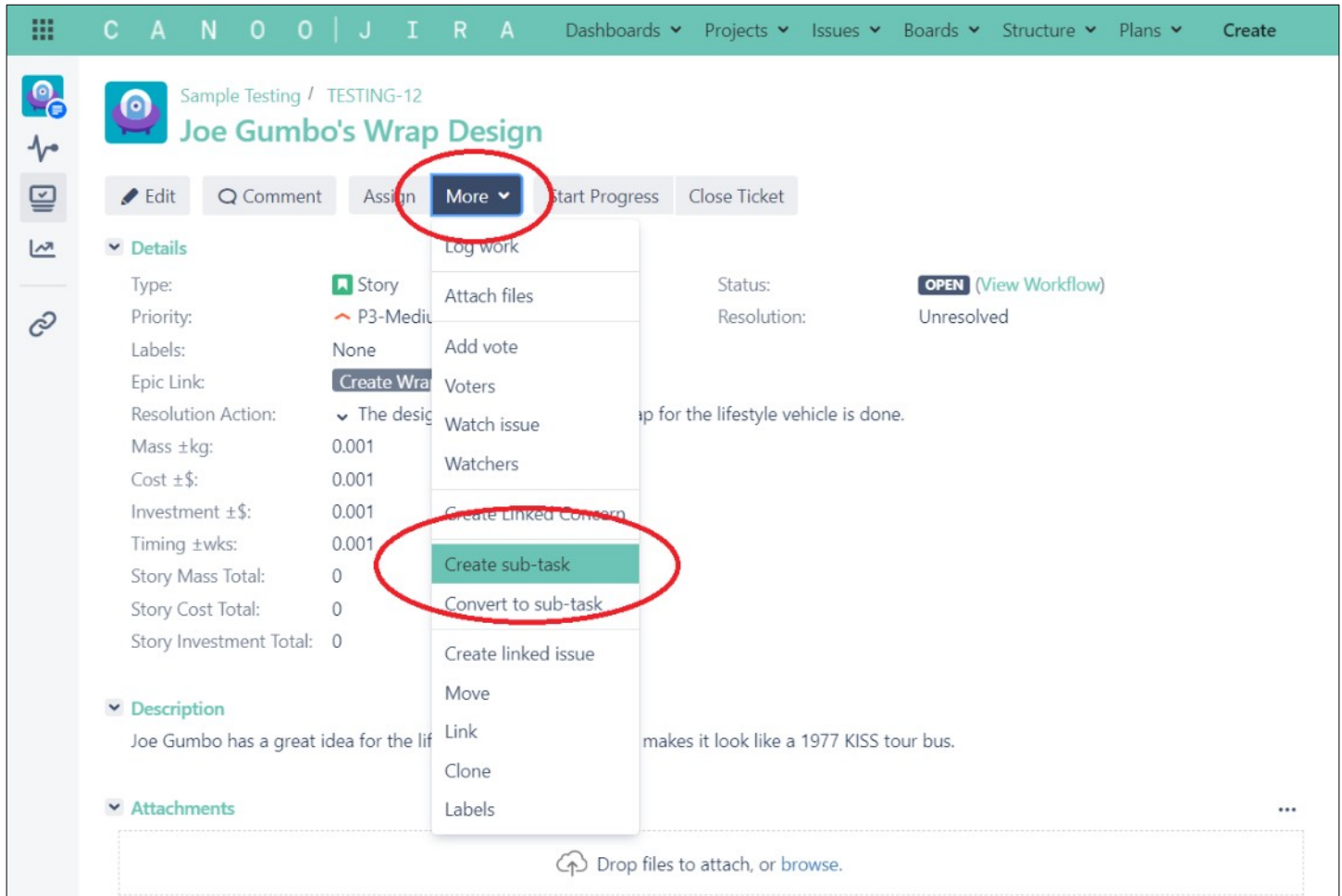
2. When the **Create Subtask** window appears, click in the **Summary** box, then type:

Test For Rocking

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?"

4. Click the **Assignee** box.

When the menu appears, click your name.
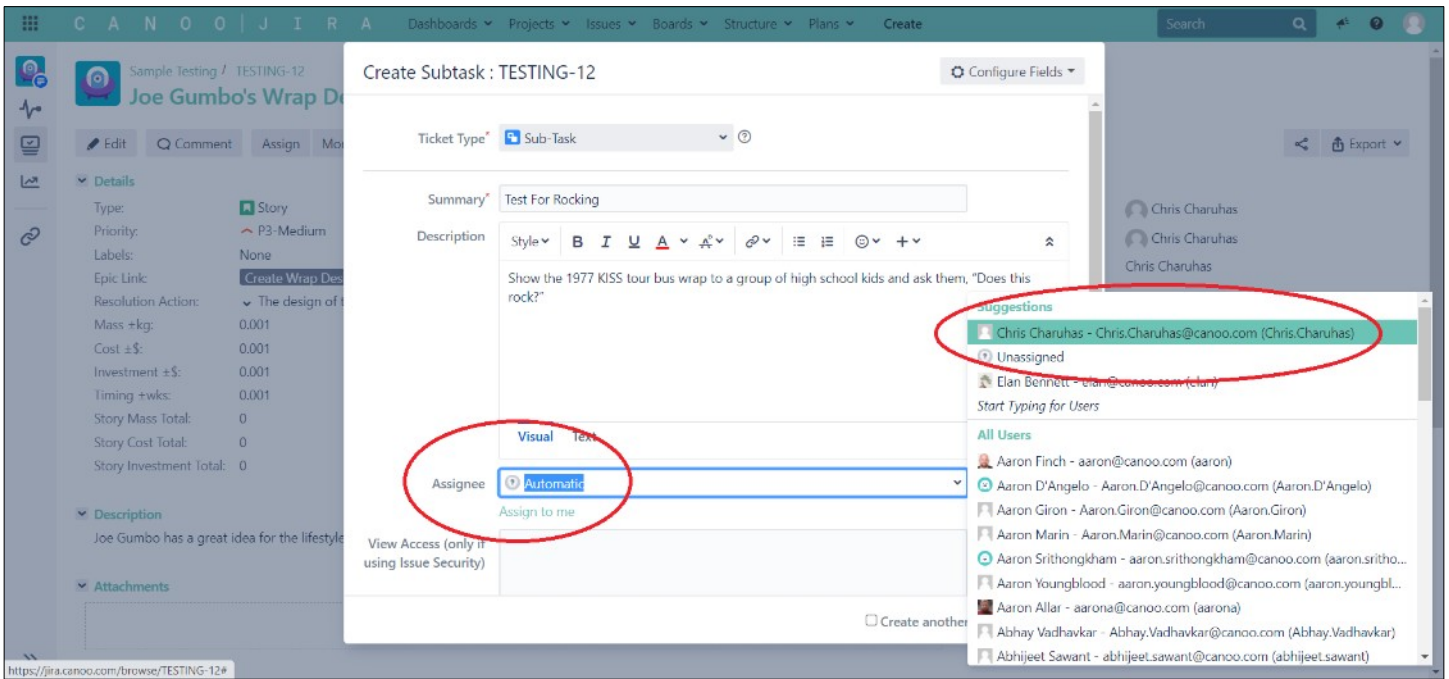
5. Click the **Create** button.
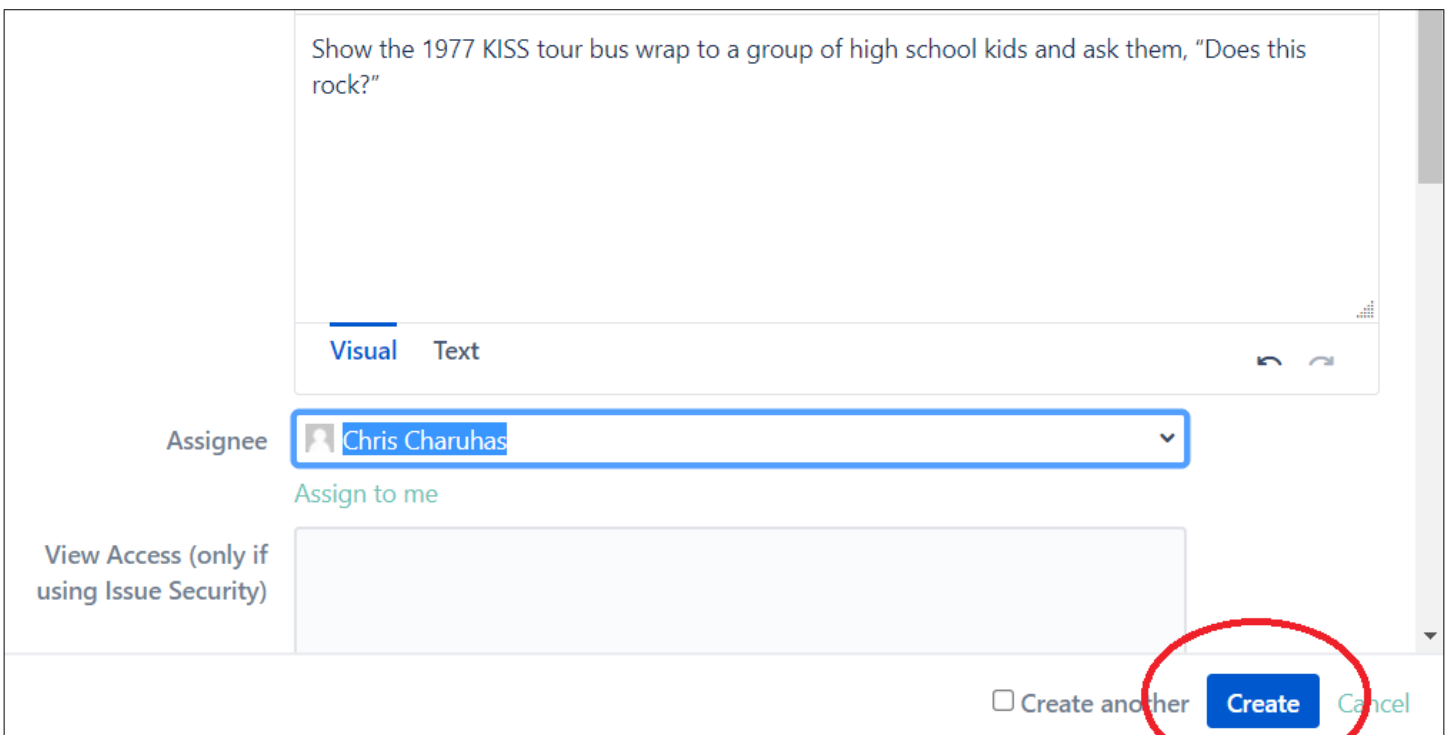
6. Scroll down in the main issue screen to the **Sub-Tasks** section.

The new subtask should be listed:
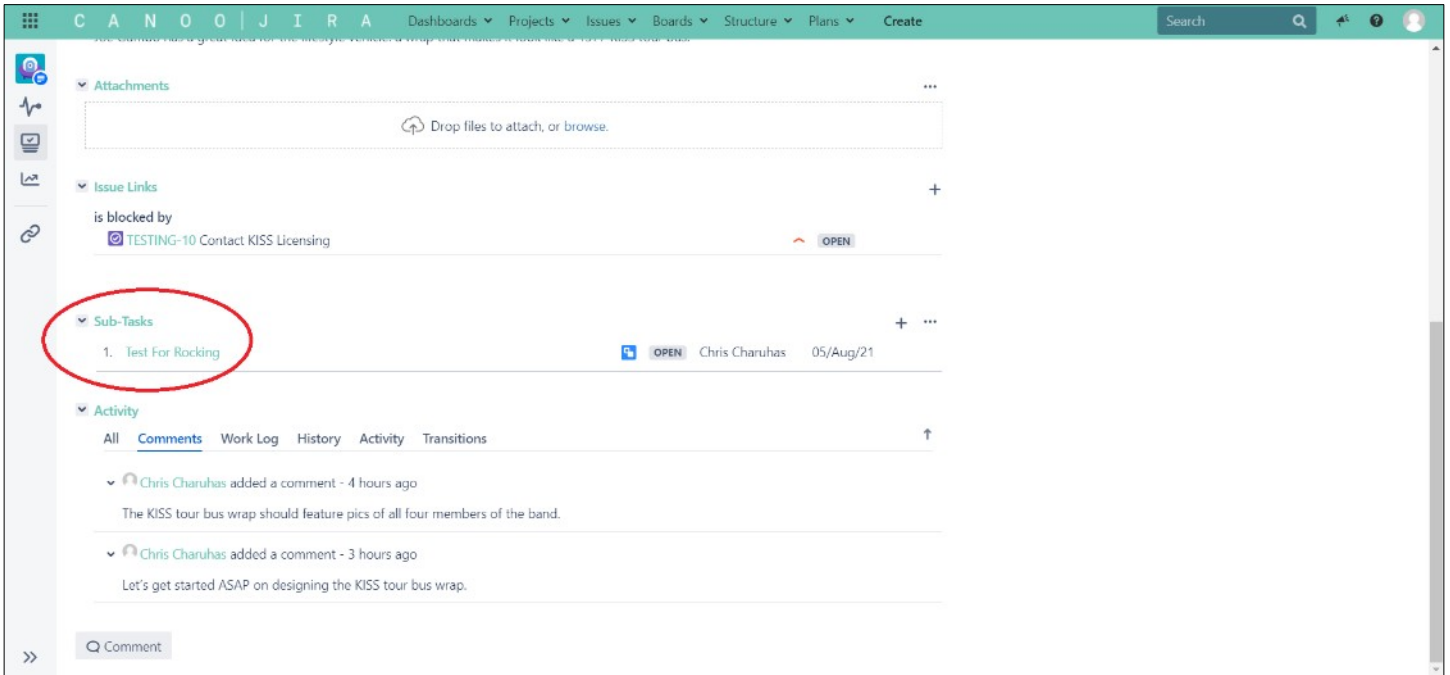
Complete a Subtask

1. Hover the mouse cursor over the subtask.

Three dots should appear at the end.
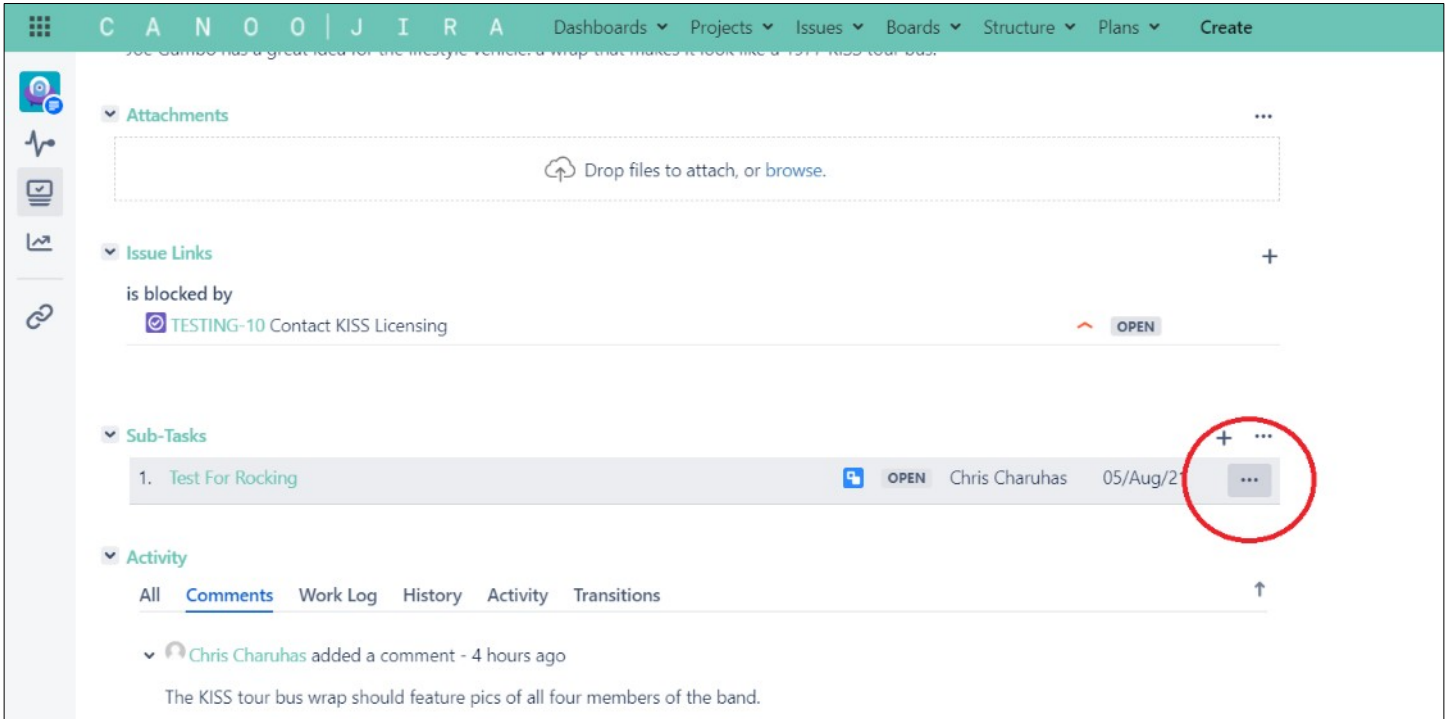
2. Click the three dots.

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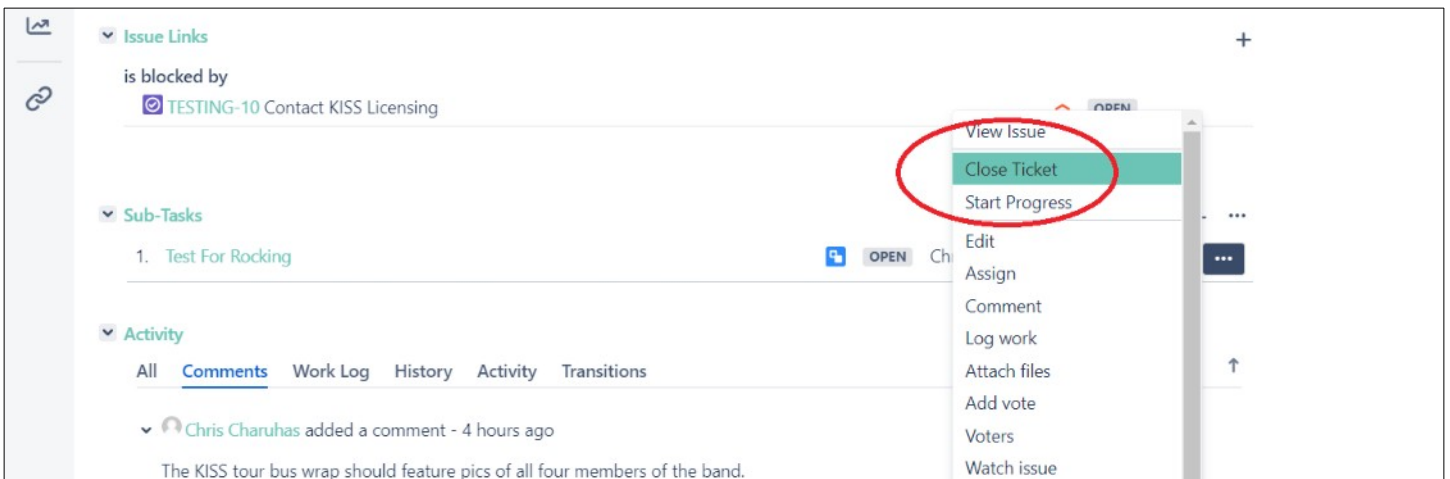
3. When the **Close Ticket** window appears, click the **Resolution** box.

When the menu appears, click **Completed to Spec**.
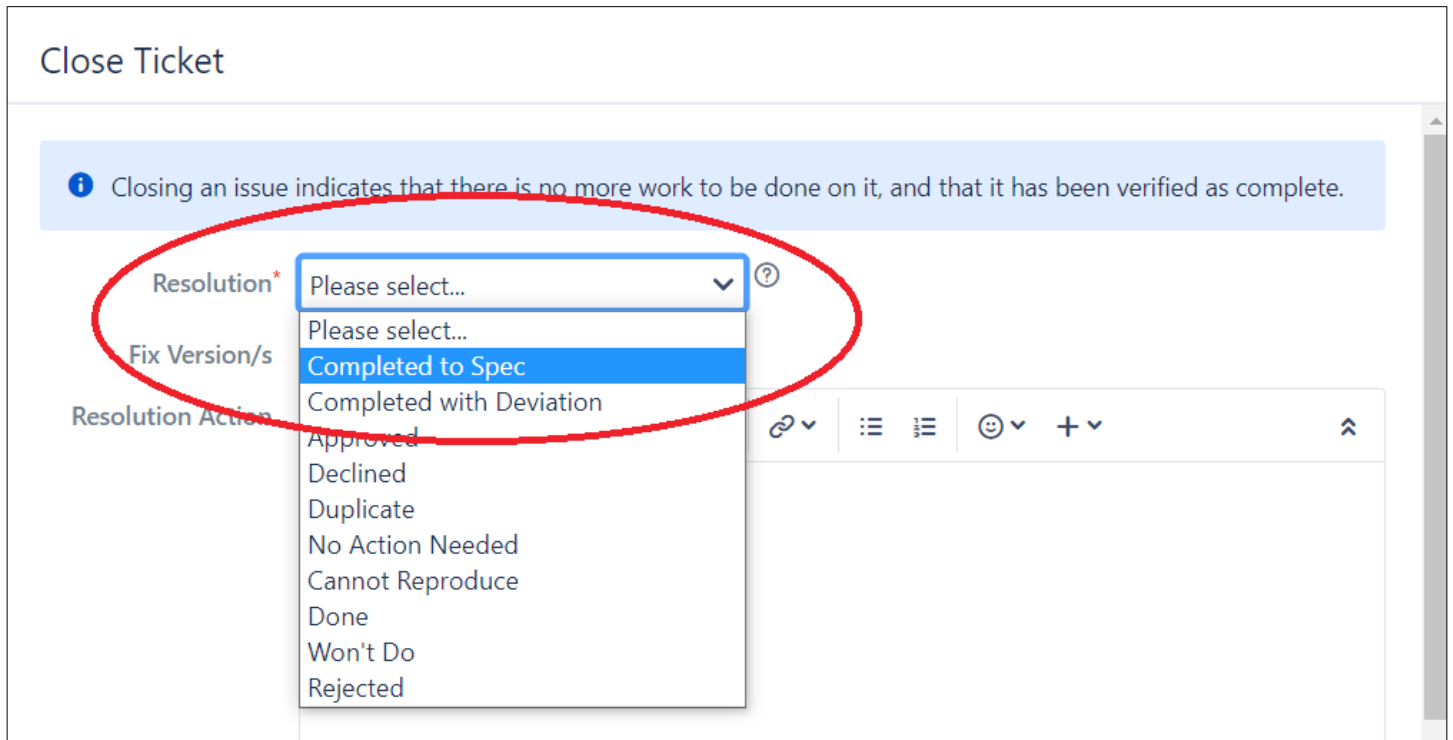
4. Click the **Close Ticket** button.
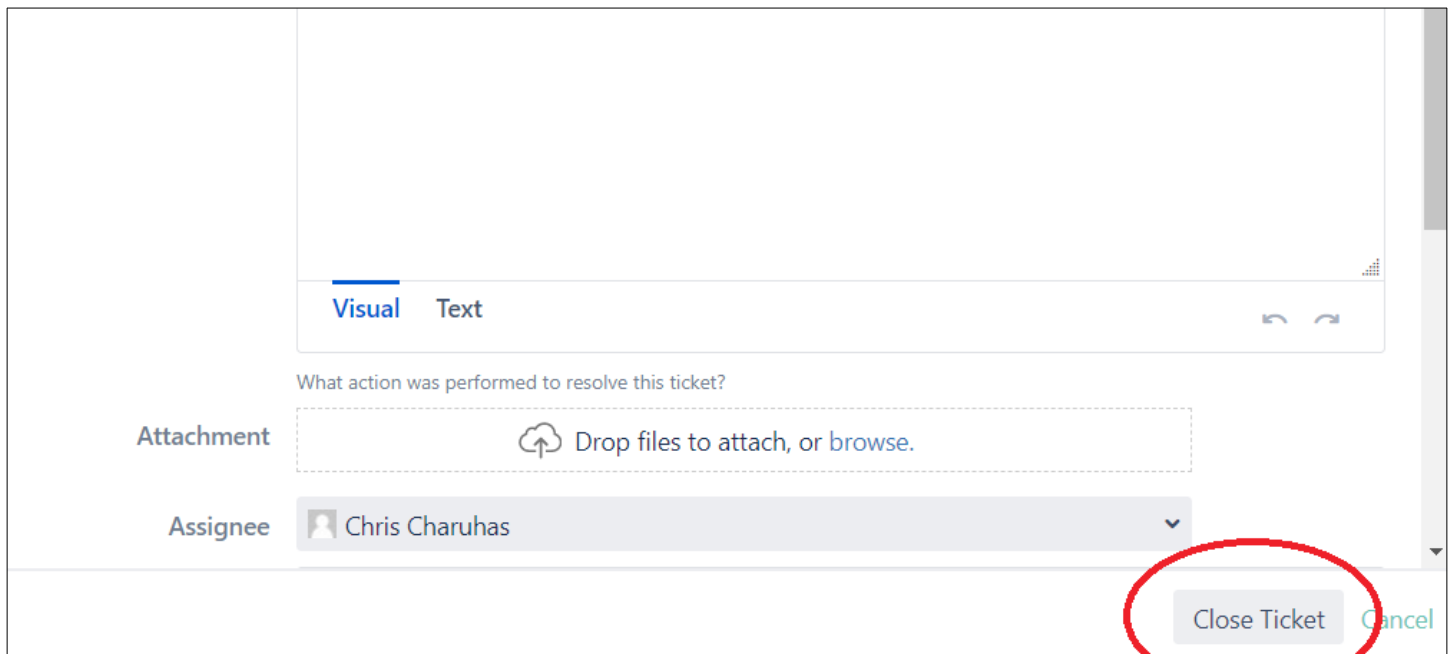
In the **[Your Name]'s Wrap Design** issue, its **Test For Rocking** subtask should be marked as closed:
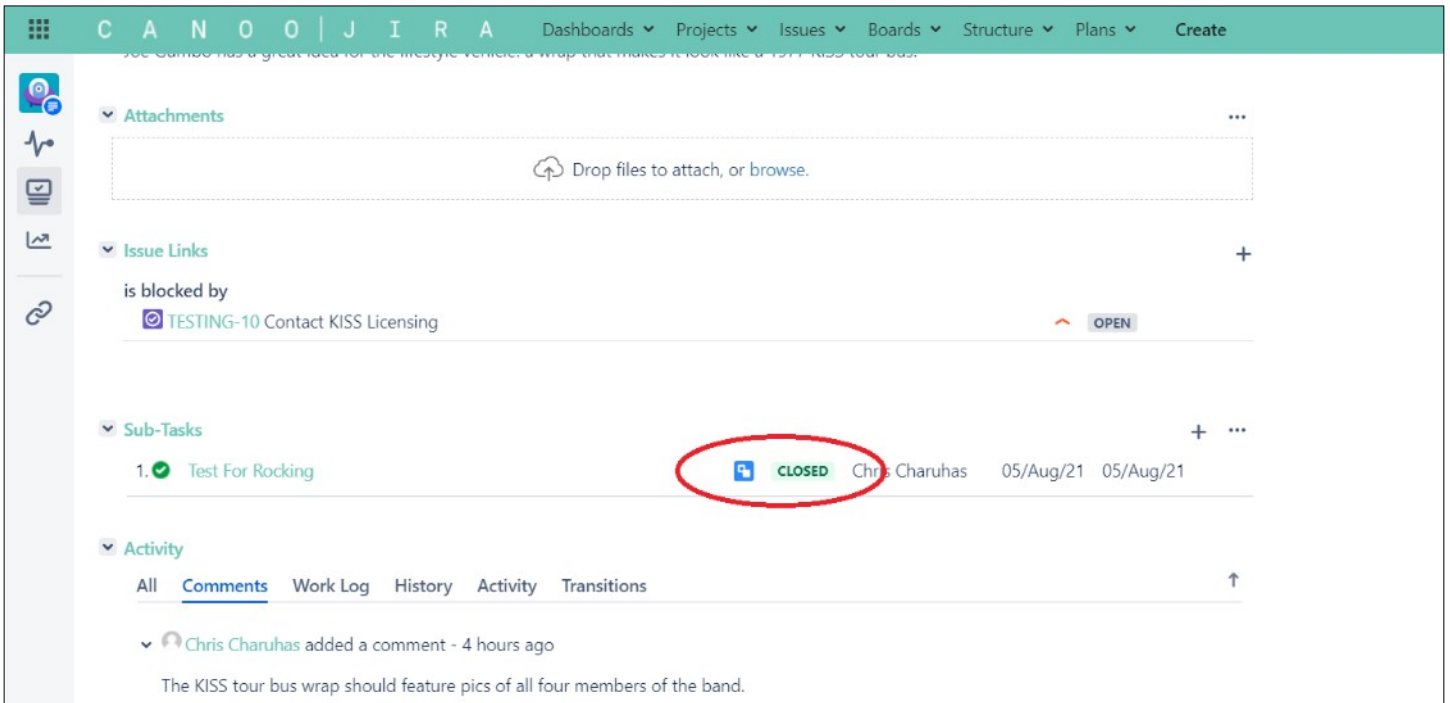
Tip: Some issues require all of the subtasks within them to be completed before the issue can be closed.

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.
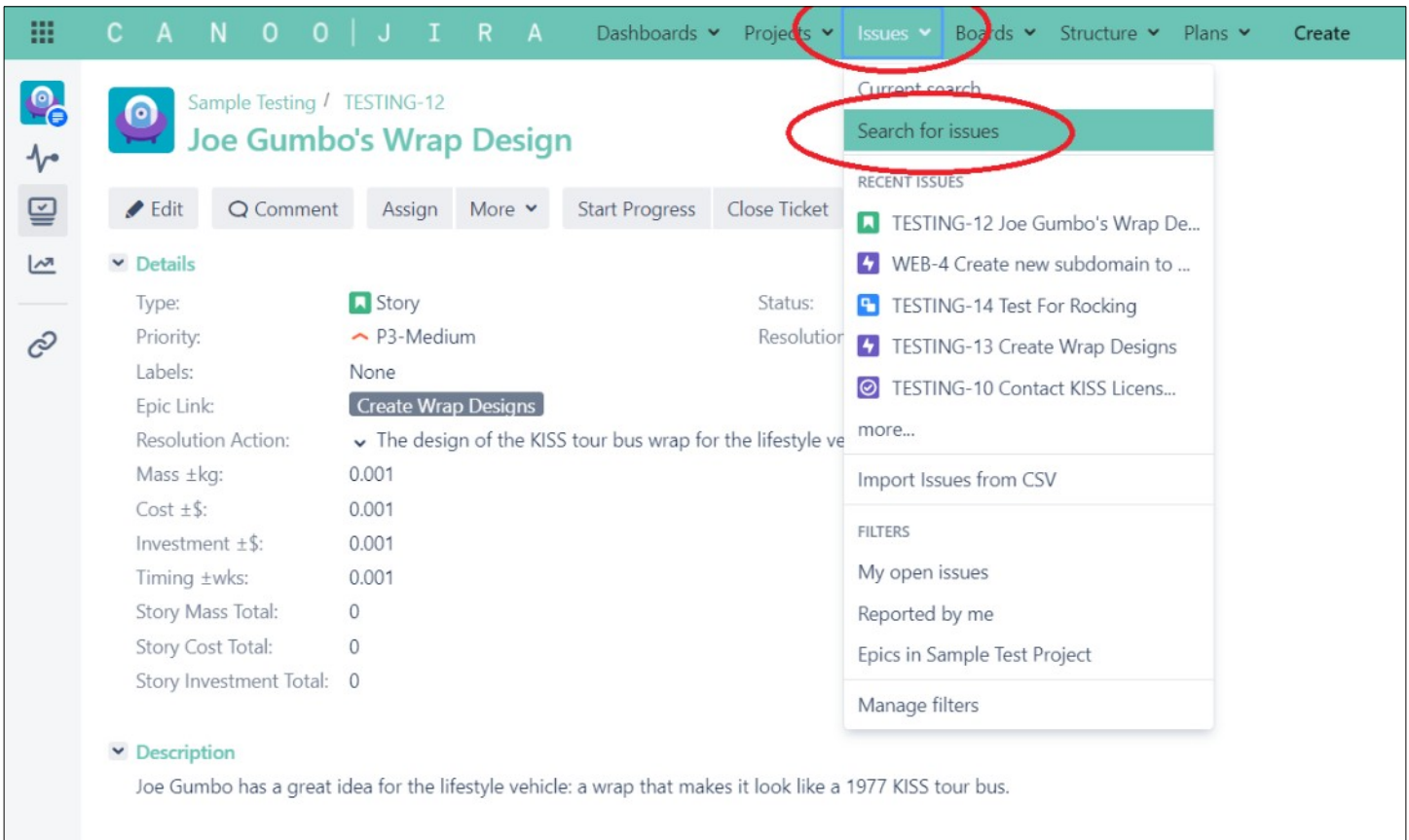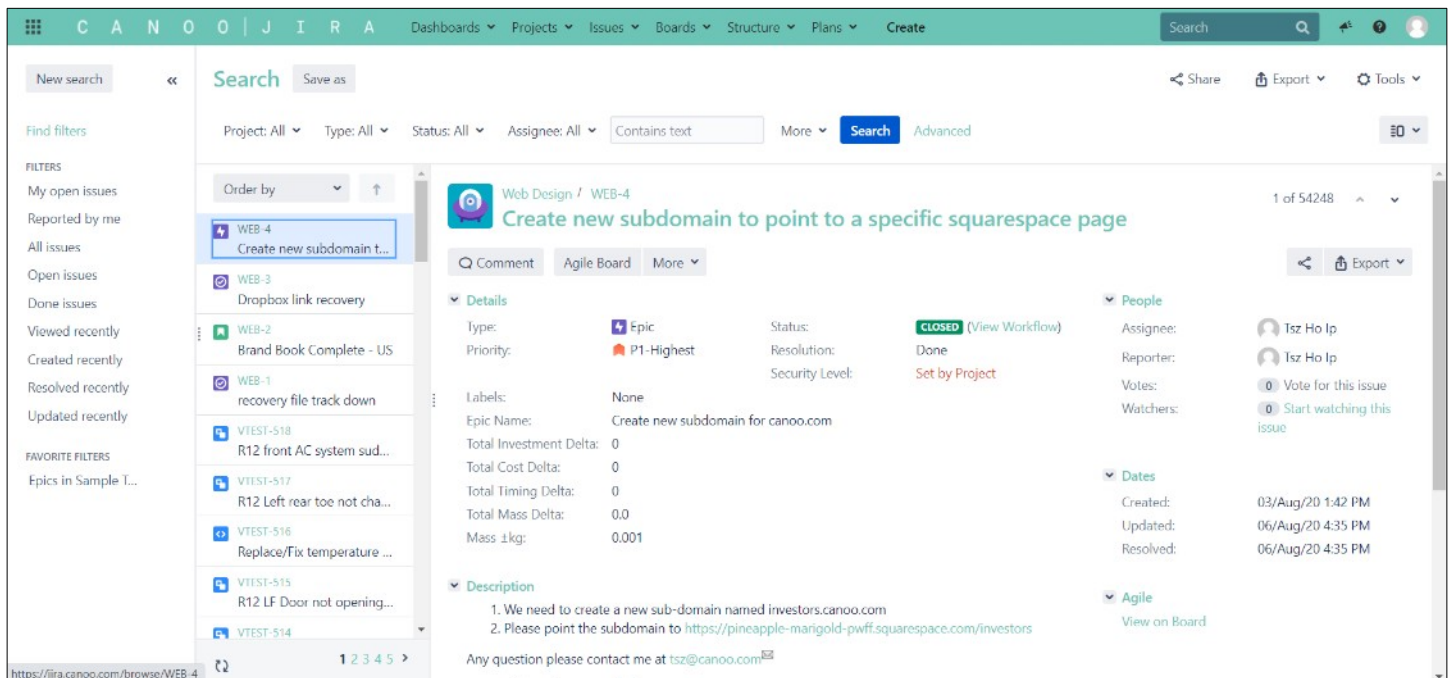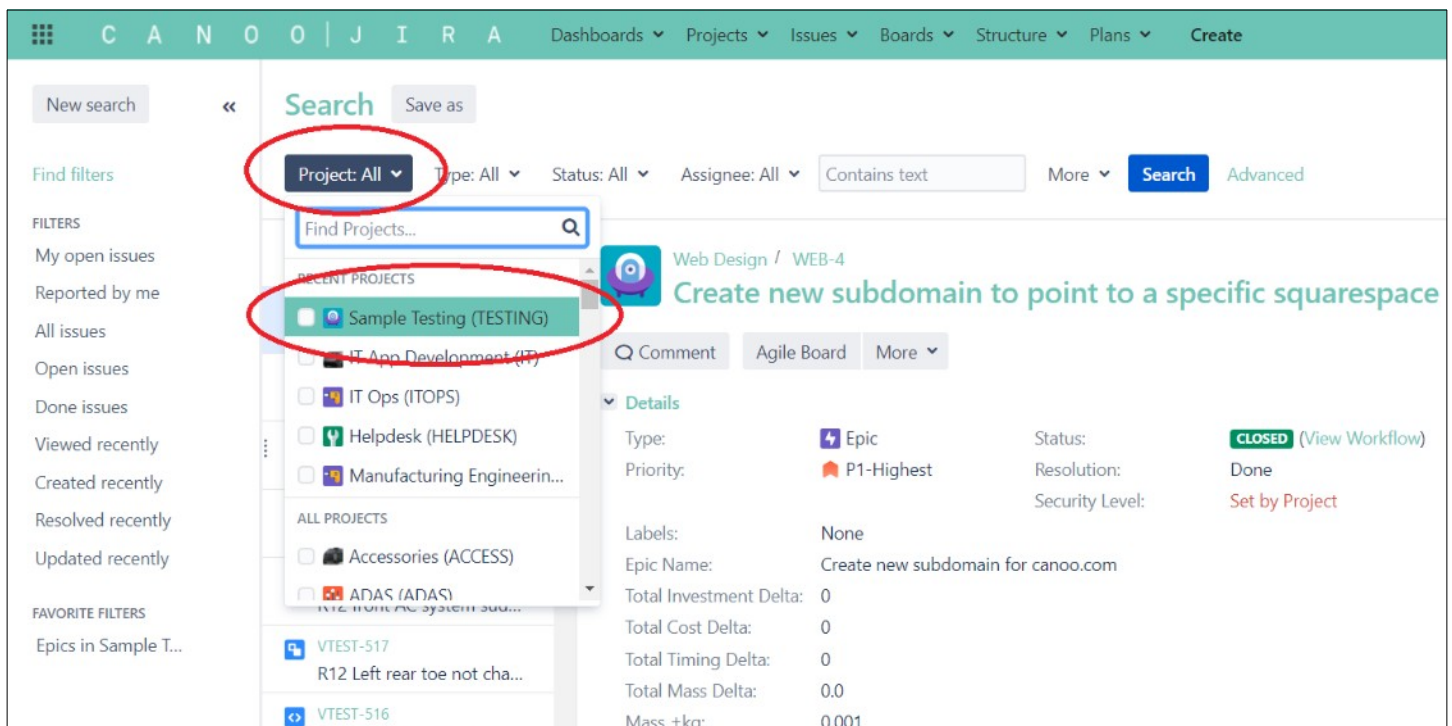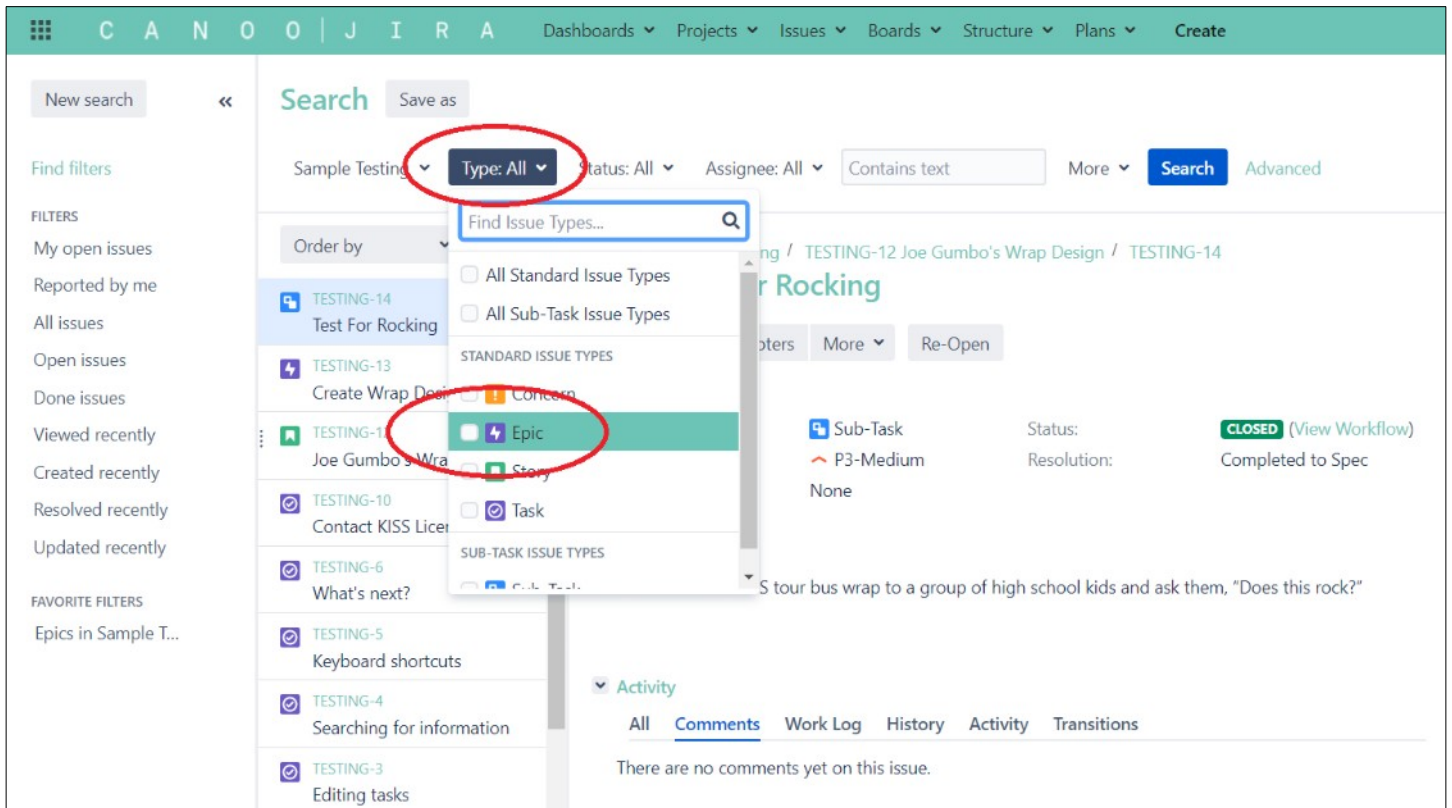

3. Click the **Project** criterion.

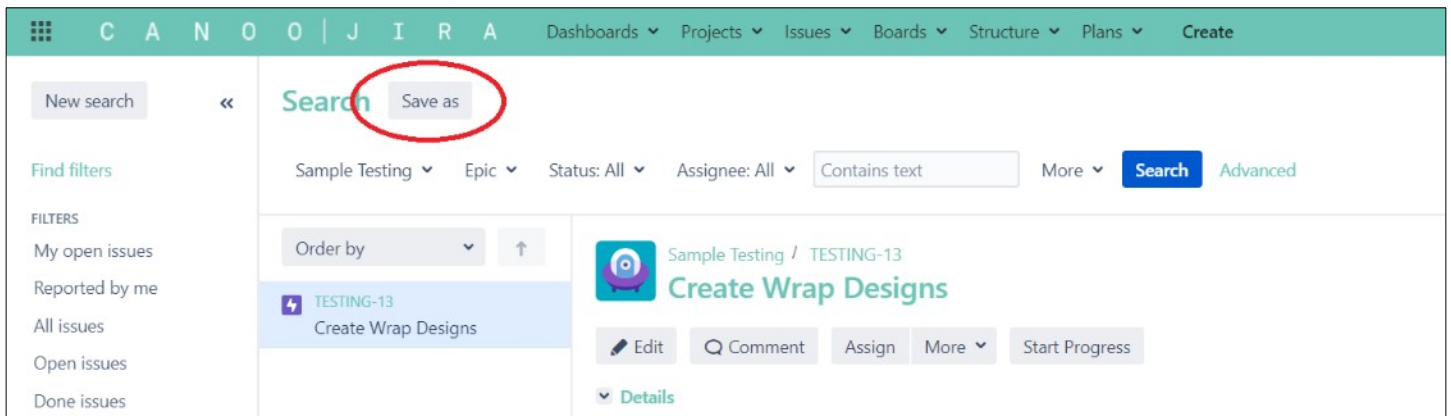When the menu appears, click the **Sample Testing** project.

4. Click the **Type** criterion.
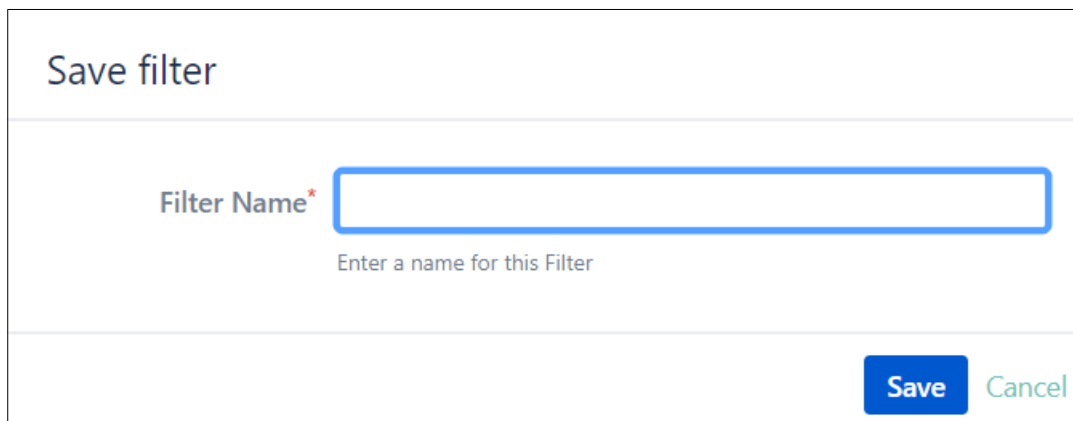
When the menu appears, click **Epic**.

Save Search

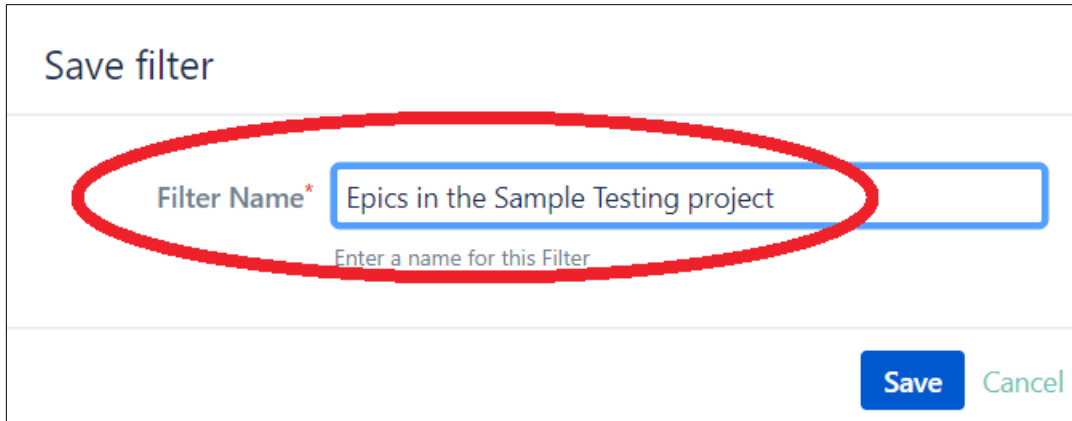**1.** At the top of the **Search** screen, click the **Save as** button.

The **Save Filter** window will appear.
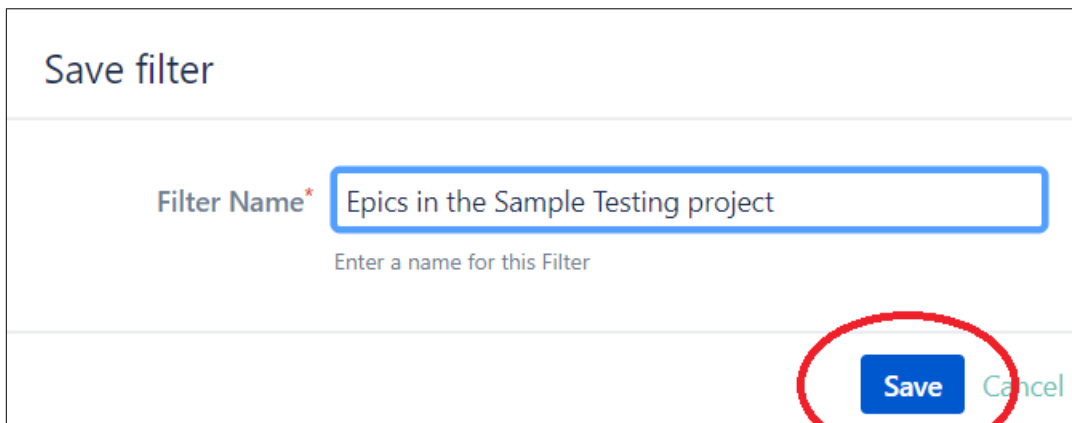
2. In the **Filter Name** box, type:

Epics in the Sample Testing project

Save filter

Filter Name* | Epics in the Sample Testing project

Enter a name for this Filter

Save   Cancel

3. Click the **Save** button.

Save filter

Filter Name* | Epics in the Sample Testing project

Enter a name for this Filter

Save   Cancel

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

Email Search

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

When the menu appears, click **Manage filters**.
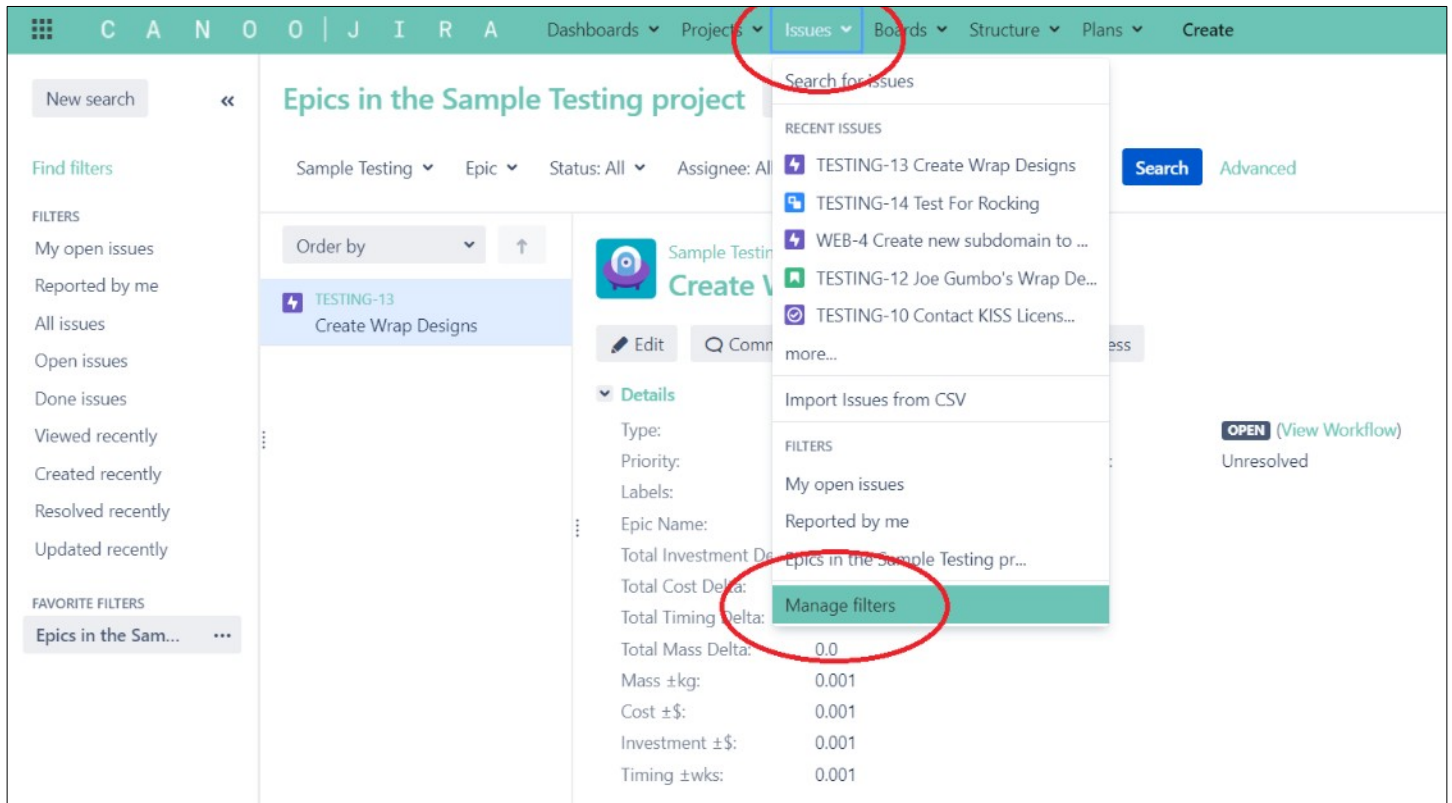
2. In the **Favorite Filters** screen, in the sidebar, click **Favorite**.
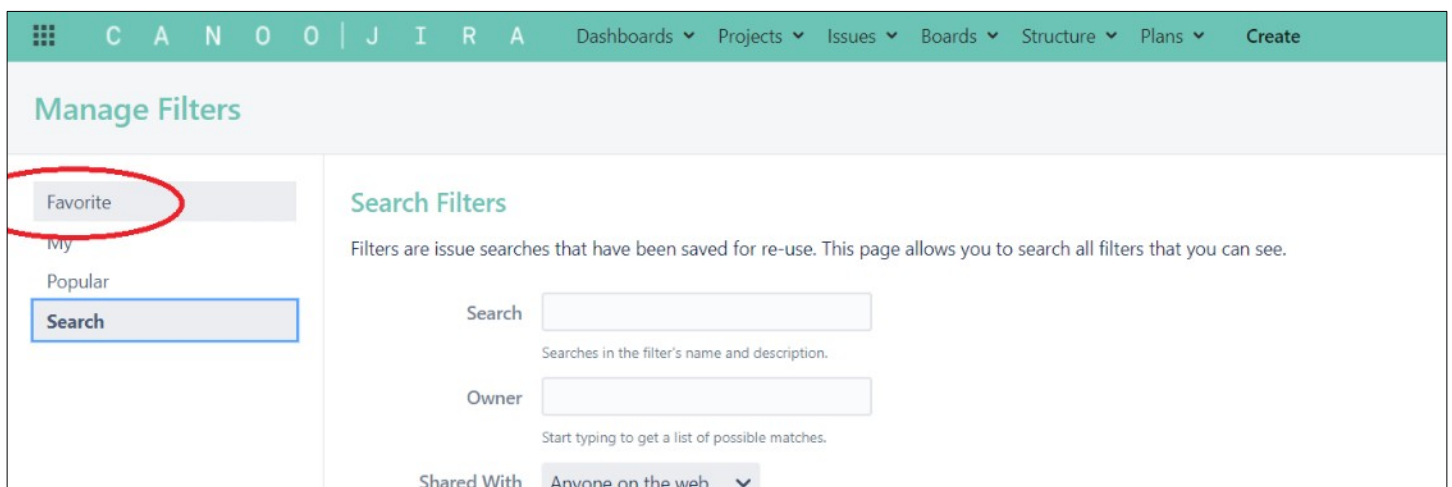
3. In the row for the Epics in the **Sample Testing project** search, click the **Subscribe** link.

The **Filter Subscription** window should appear.

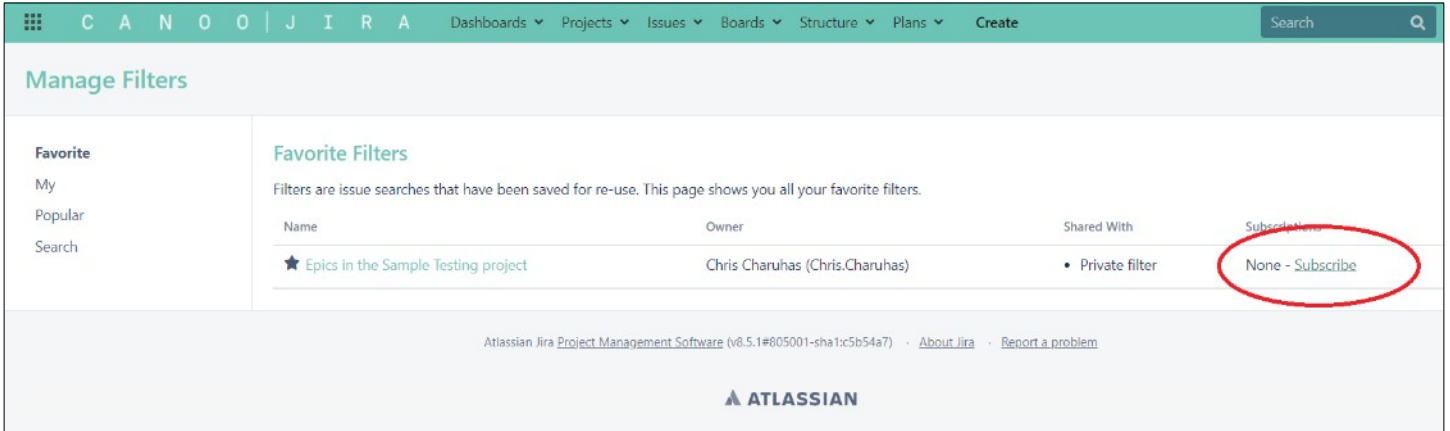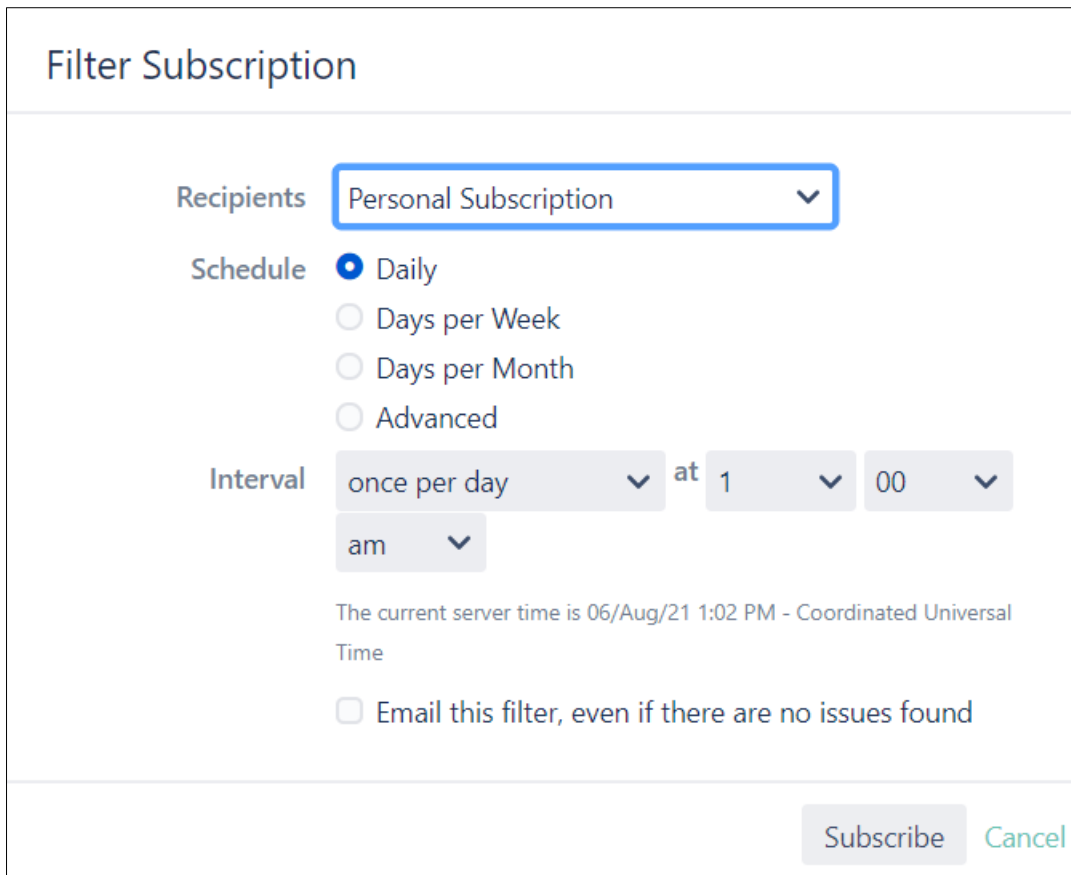*Note: This enables you to send out an email to a person or group that contains a list of all the issues in this search.*

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

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

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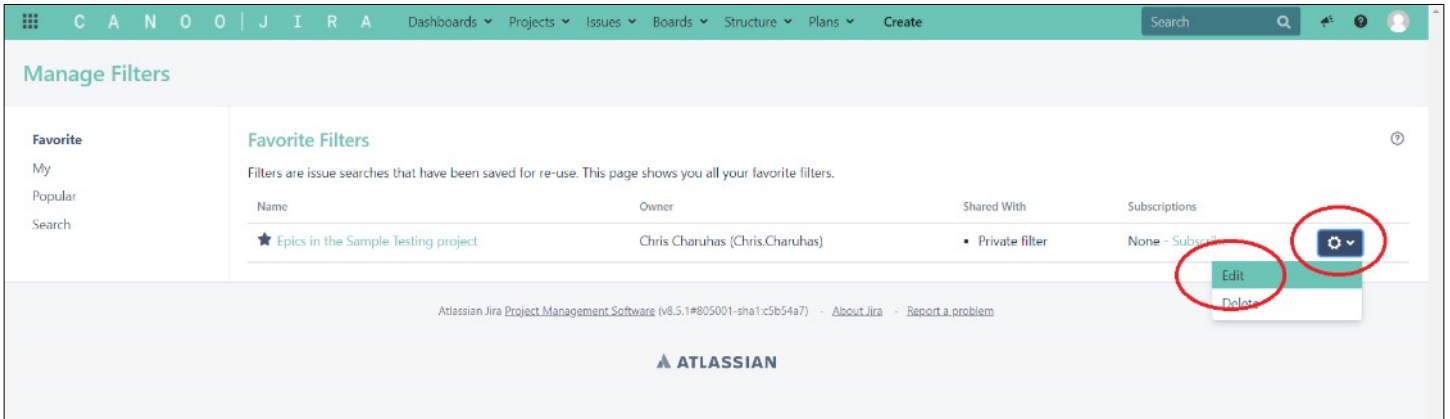
6. At the bottom of the window, click the **Cancel** link.

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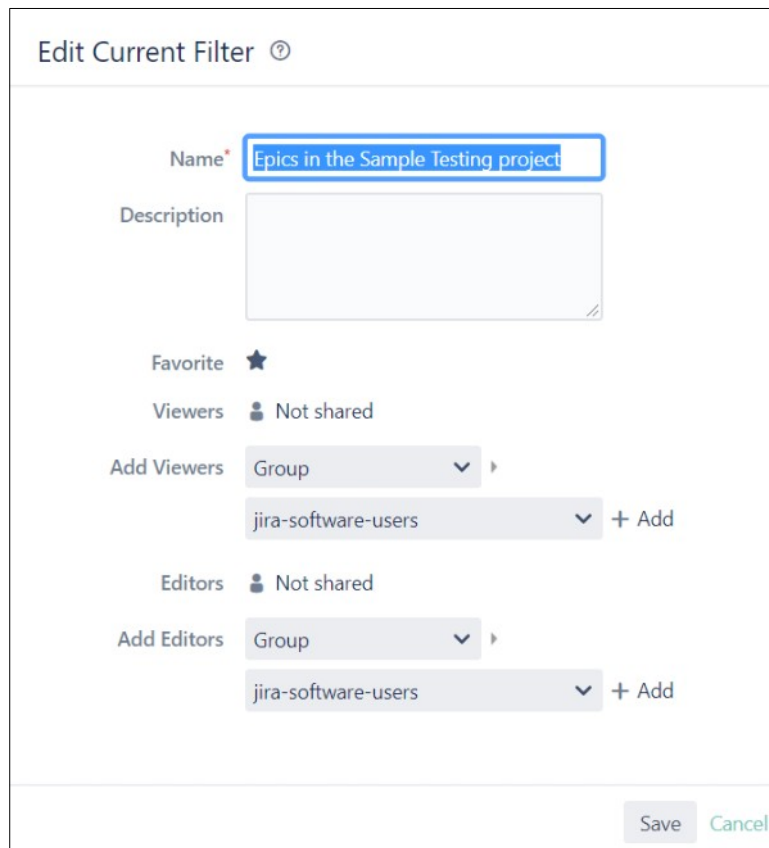
Share Search

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 ⑦

Name*	Epics in the Sample Testing project
Description	
Favorite	★
Viewers	👤 Not shared
Add Viewers	Any logged-in user ∨ ＋ Add
Editors	👤 Not shared
Add Editors	Group ∨ ▸
	jira-software-users ∨ ＋ Add

Save Cancel

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

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

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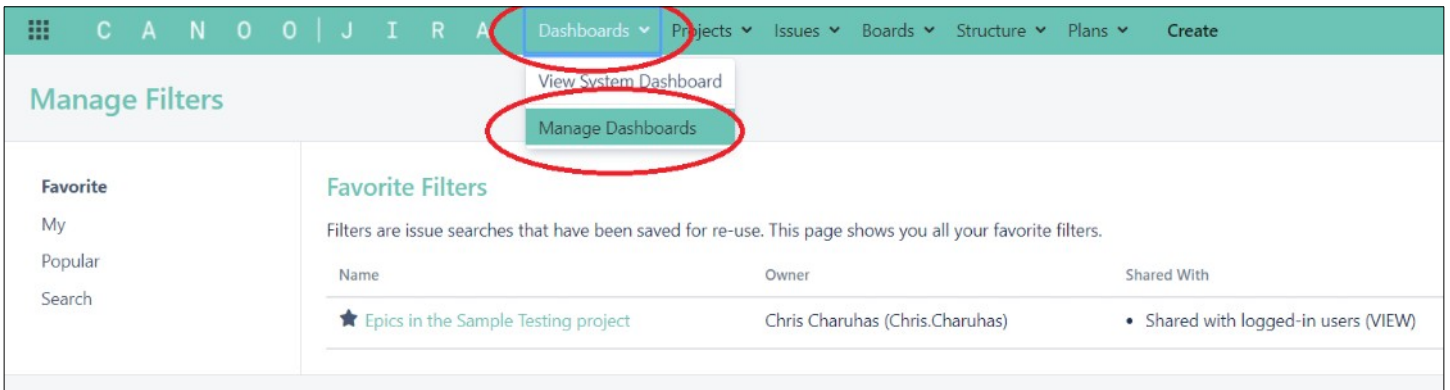
It's customizable, so you can configure it to display info that's relevant to you.

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:
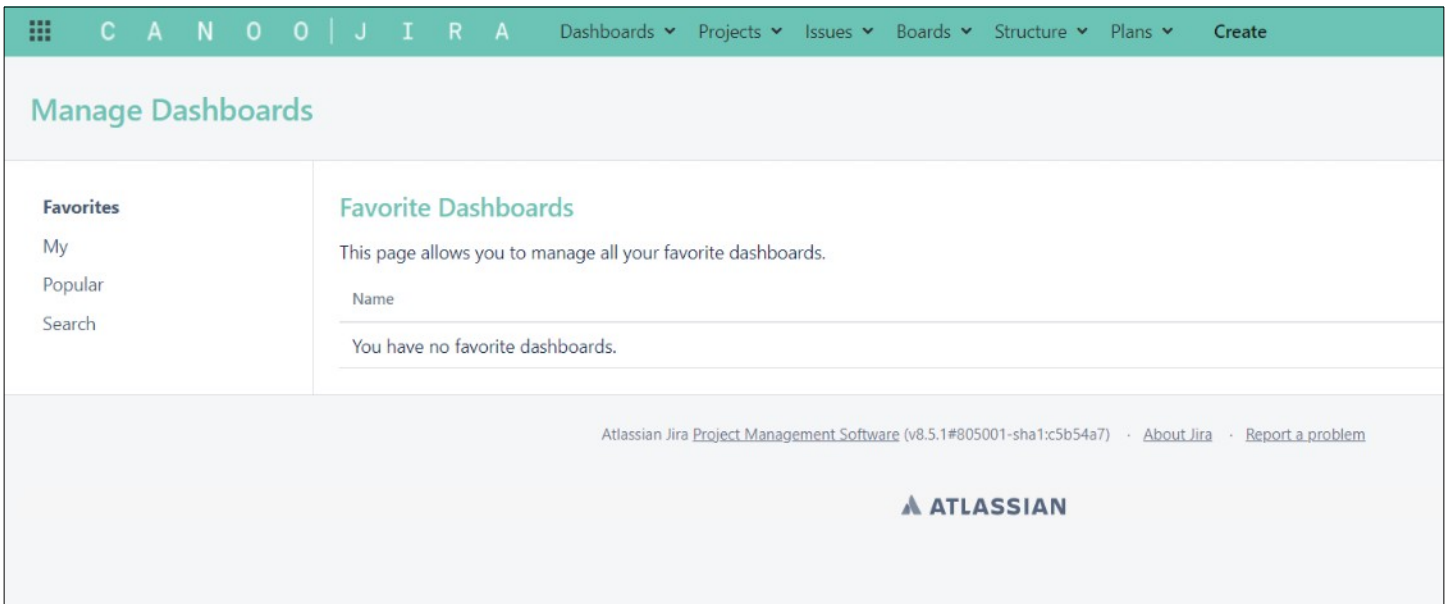
3. In the sidebar, click **Search**.
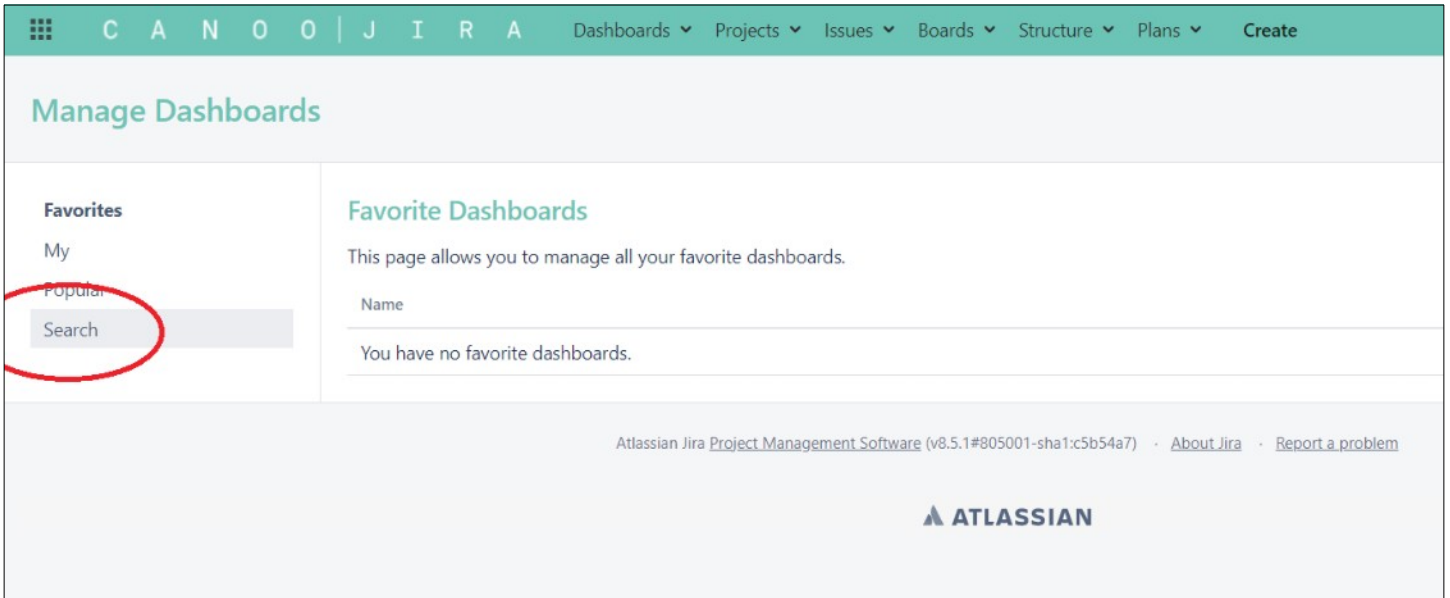
A **Search Dashboards** area should appear:

4. Click the **Search** button.

A list of all available dashboards should appear:

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

system
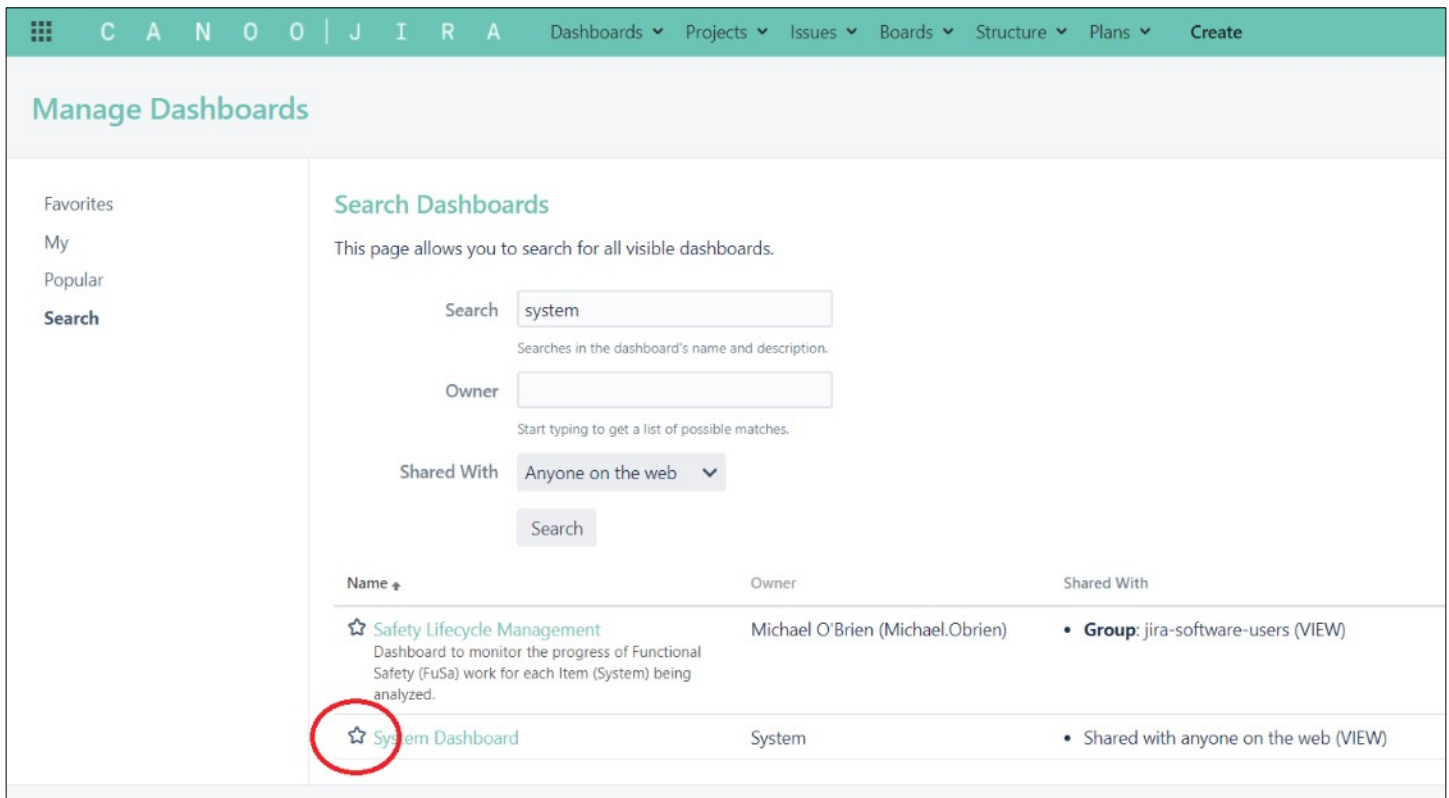
6. Click the **Search** button.
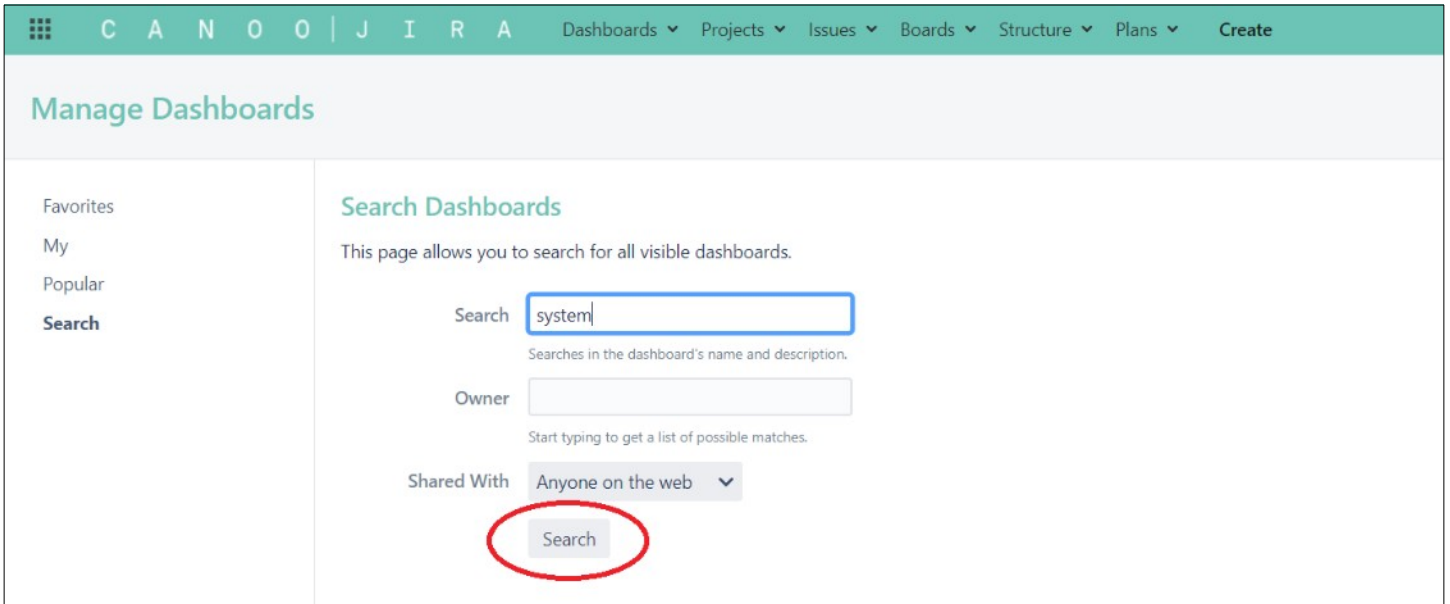
The **System Dashboard** dashboard should appear in the list of search results:
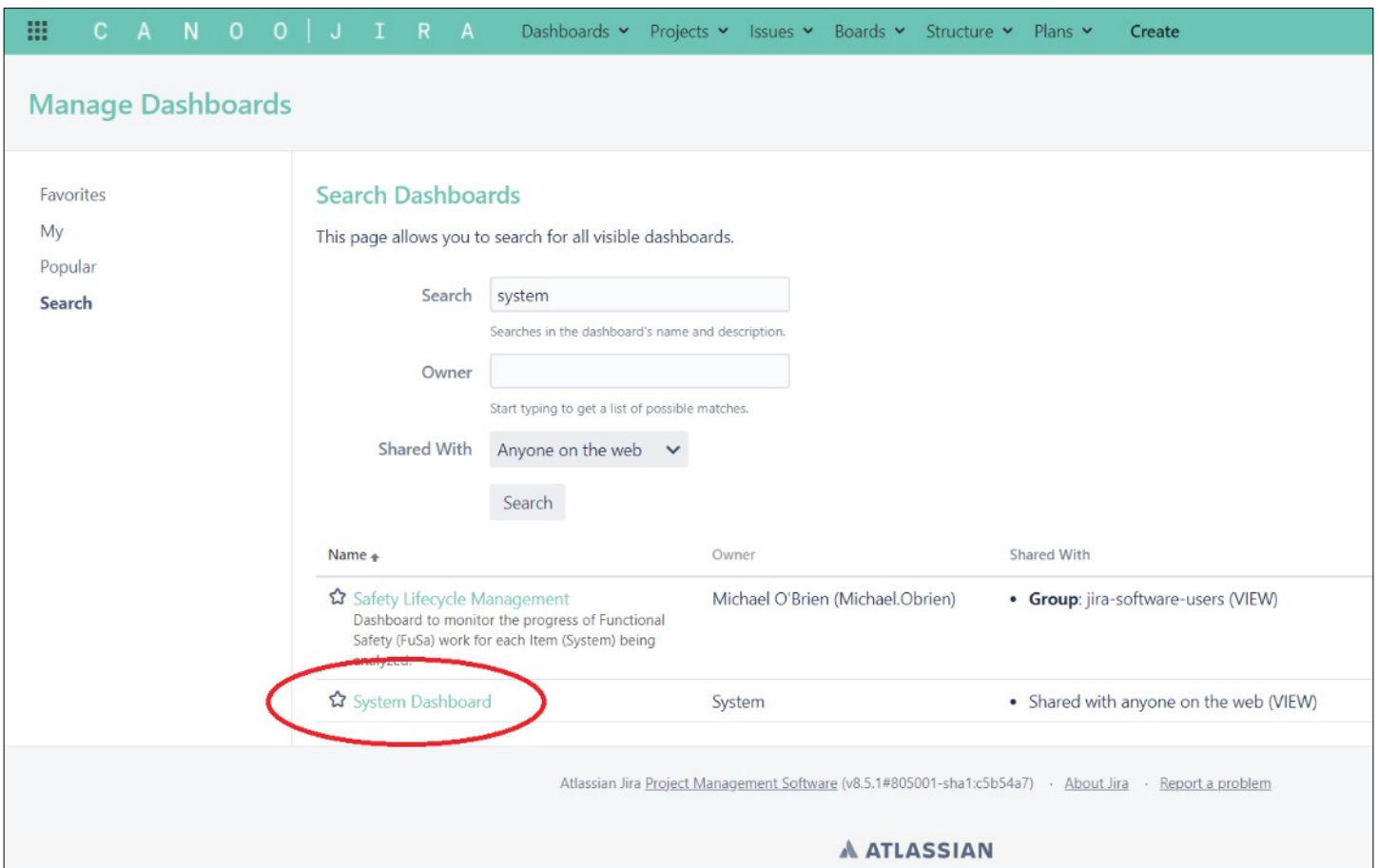
Add as a Favorite

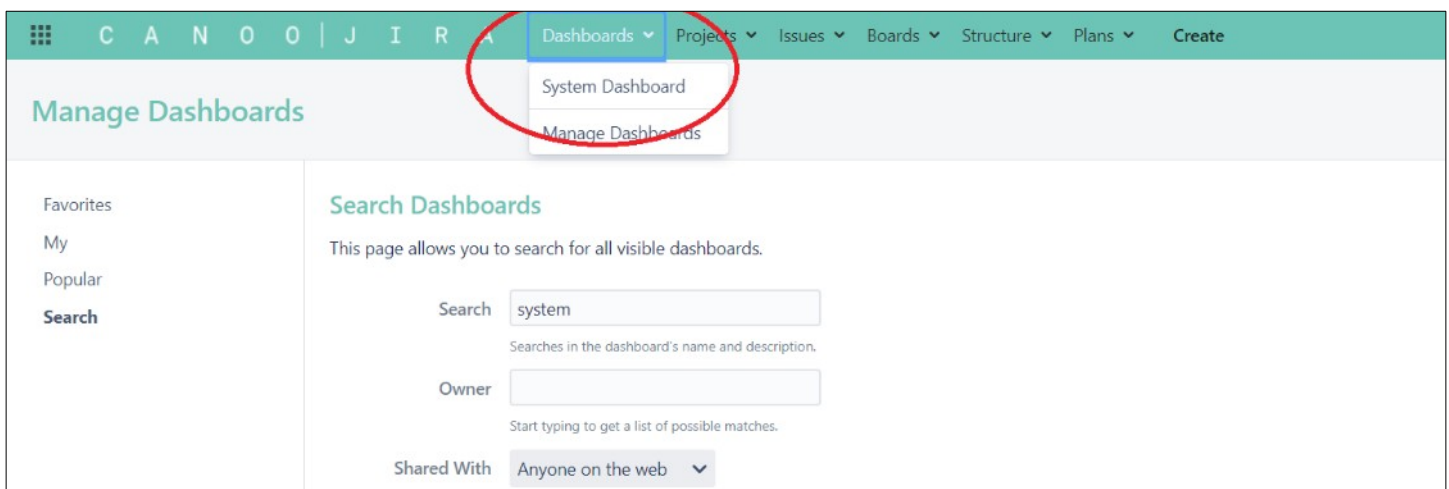**1.** In the list of search results, click the star to the left of the **System Dashboard** dashboard.

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

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