

# Jira the Basics



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## Jira Project

### Jira Project Definition

A Jira **Project** represents a Syensqo IT initiative (for example: Pricing, customer Portal, Lab Booster, ERP Rebuild, etc.)

**Projects** is the module you will use the most.

Click on **(1) Projects** Click on **(2) View all projects** Search and find the name of the IT Initiative(s) you are working on.

**Note 1:** Use the favorite Jira feature (Star icon) to mark your Jira Project(s) as your favorite so that it shows up as the first option(s) in the **Projects** menu.

**Note 2:** If you are admin of your Jira project, you can modify the configuration of you project by clicking on  [Project settings](#) at the bottom of the left panel.

### Create a Jira Project

To create a Jira Project (Space), please create a **SyRa Ticket** or contact [SHAIKH, Sahil](#) .

## Issue

### Issue Definition

In Jira, an issue is a generic term for any task, bug, story, epic, or work item that needs to be tracked and managed within a project. It represents an unit of work that a team needs to complete.

**Below represents the hierarchy between the different type of issues:**

| Hierarchy | Issue Type                                                                                                                                                                                                                                                                                                                                                                                        | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| #1        |  <b>Initiative</b>                                                                                                                                                                                                                                                                                               | IT Initiative (like the One-Pager)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| #2        |  <b>Epic / Feature (SAFe)</b>                                                                                                                                                                                                                                                                                    | In Jira, an Epic is a large body of work that is broken down into smaller, manageable issues such as stories, tasks, or bugs.<br>It represents a high-level objective that typically spans multiple iterations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| #3        |  <b>Bug</b><br> <b>Spike</b><br> <b>Story</b><br> <b>Task</b> | A bug is an issue that represents a defect, error, or unexpected behavior in the system.<br><br>A spike is a research or exploration task used to gain knowledge or reduce uncertainty before implementing a feature. Spikes help teams make informed decisions about architecture, tools, or technical solutions.<br><br>A Story in Jira represents a small, independent unit of work that delivers value to the user. It is written from the user's perspective and describes a feature, functionality, or improvement needed for the product. See <a href="#">HERE</a> for more information on how to create a User Story<br><br>A task is a standard work item representing a piece of work that needs to be done but does not fall under a Bug or Story. Tasks are often used for technical work, operational activities, or general to-do items. |
| #4        |  <b>Sub-task</b>                                                                                                                                                                                                                                                                                                 | A Subtask is a smaller unit of work that breaks down a Story, Task, Bug, or Spike into more manageable pieces. It is used when a larger work item needs to be divided among multiple team members.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

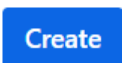
## Create an Issue

You create **Jira issues** to track your team work within your project.

**You can create these issues from:**

Within a column of your board or backlog (if you have the option) by clicking  :

- With this option you do not need to fill out the all the fields within the issue, only the title called the summary in Jira.

The top main menu by clicking the  button

- Fill out the necessary fields to create the issue (Be careful fields marked with a red Asterix are mandatory)

To create a subtask: within a story/task/bug, click the  button and click  Subtask

**Note 1:** When you need more information about what to select or type in a Jira field, **HOVER** on the title of the field, the tooltip icon "i" will show up, HOVER on the "i" and you will see a description if any.

**Note 2:** If there is no description please, contact Jira admins to ask or add/update description.

## Main issue fields:

| Fields  | Description                    |
|---------|--------------------------------|
| Summary | This is the title a Jira issue |

|             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Issue Types |  <b>Initiative</b><br><br> <b>Epic / Feature (SAFe)</b><br><br> <b>Bug</b><br><br> <b>Spike</b><br><br> <b>Story</b><br><br> <b>Task</b><br><br> <b>Sub-task</b> |
| Parent      | To link parent issue. The issue on top of the issue being created or edited.<br><br>Example: <ul style="list-style-type: none"> <li>• If the issue is an Epic/Feature, its parent can be an Initiative</li> <li>• If the issue is a Story/Task/bug, its parent can be an epic/feature</li> </ul> <a href="#">blocked URL</a>                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Team        | The team that will work on the issue                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Start date  | The start date of the issue                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Due date    | The due date of the issue                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

 **WATCH Jira Demo**

[Video 4 - How to create an Issue? \(e.g., Epic, Task\)](#)

## Automation Rule to Create Epics (Milestones) - How to use it?

We have created a new Automation Rule in Jira to make your work easier, especially if you are managing a Waterfall project.

Portfolio and SyWay have agreed on the following recommended structure, which is strongly advised for initiatives using the Waterfall methodology—particularly those impacting SyWay. The structure is as follows:

- Plan [Design] – (Initiative/Sub-Initiative Name)
- Deliver [Build] – (Initiative/Sub-Initiative Name)
- Deliver [Test] – (Initiative/Sub-Initiative Name)
- Deliver [UAT] – (Initiative/Sub-Initiative Name)
- Deliver [Deployment] – (Initiative/Sub-Initiative Name)
- Go-Live – (Initiative/Sub-Initiative Name)

Replace **(Initiative/Sub-Initiative Name)** with your **actual initiative or sub-initiative name**.

 **WATCH Jira Demo**

[Video 6 - How to use the Automation Rule to Create Epics Template \(Milestones\)](#)

## Boards

### Boards Definition

Boards are a fundamental component of Jira, serving as a visual representation of work being done within a project. Here's a detailed look at their definition and functionality:

- A **Jira Project** can have one or multiple boards;
- An **IT Initiative** can have multiple scopes/teams, then multiple boards;
- A **Board** encompasses a group of issues being worked on by one team;
- The Board(s) in a Jira project can be found at the top of the left panel.

Issues travel through multiple statuses from the first to the last column of the board.

**Note:** If you are admin of your Jira project, you can configure your board by clicking the  at the top right corner of your screen.

## Create a board

Within your [Jira Project](#):

Click the selection field on the [top of the left panel](#) under "Planning" and Click  Create board  
Choose between a [Scrum](#) or a [Kanban](#) Board  
Select "**Board from an existing project**" and choose the [current project](#) you are in  
Give it a [name and save](#)

Once create go to the  at the top right corner of your screen and click "Configure Board"  
[Go to columns](#) to edit the columns of your board

 **WATCH Jira Demo**

[Video 2 - How to create a Board?](#)

## Plan (Timeline)

A Plan shows you the whole hierarchy of your issues in a Timeline format (Gantt Chart).

To access a Plan, Click on [Plans](#)  button in the [top menu](#) and pick an [existing Plan](#)

**Note:** Use the favorite Jira feature (Star icon) to mark your **Timeline(s)** as your favorite so that it shows up as the first option(s) in the **Plan** menu.

Once you are in the selected Plan: you can either choose the [Timeline \(Gantt Chart\)](#) or the [List view](#) (selected fields):

[TIMELINE](#) [LIST](#)

 **WATCH Jira Demo**

[Video 3 - How to create a Plan \(Timeline\)?](#)

## Search

In the [top right corner](#) you can conduct a [search through Jira](#) to find specific issue(s) you are looking for

## Team

In the [top menu](#) you can [create a team](#) and [add your team members](#)  
You can [select the team\(s\)](#) in you IT Initiative

 **WATCH Jira Demo**

[Video 5 - How to create a Team?](#)

- [Video 1 - Jira Project](#)
- [Video 2 - Board \(Kanban\)](#)
- [Video 3 - Plan \(Timeline\)](#)
- [Video 4 - Issue \(Epic, Task, etc.\)](#)
- [Video 5 - Team](#)
- [Video 6 - Automation Rule to Generate Epics](#)

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