JIRA USER GUIDE FOR MANAGED DELIVERY

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VERSION INFORMATION

Version	Date issued	Remarks	Author
1.0	November 11, 2005	First complete version	Peter van den Berkmortel
1.1	January 6, 2006	Fixed a number of typos and issues raised by Peter den Ouden.	Peter van den Berkmortel
2.0	March 7, 2007	New version because of introduction of project roles.	Peter van den Berkmortel
2.1	October 22, 2007	New workflows for Risk and Document Management added.	Peter van den Berkmortel
2.2	August 12, 2008	Added new role.	Peter van den Berkmortel
2.3	July 26, 2010	Several minor changes as a result of the Jira update to 4.1.1	Thomas de Bruin

DISTRIBUTION

Name	Company/Function
MD Employees	Sogeti
JIRA Users	Anybody using JIRA

TABLE OF CONTENTS

1 INTRODUCTION

This user guide is meant for employees of Sogeti Managed Delivery (MD) in particular and anybody using the MD installation of JIRA in general. It describes how to use the JIRA issue tracking tool to aid the process of issue administration. This manual is in English, so all employees of Managed Delivery (including those in India) can read it.

So, where does the name JIRA come from? Here's what Atlassian (the company that makes JIRA) has to say about that:

> *Like all good names in the software industry, it started as an in-house code name.*
>
> *Our experience with Bugzilla was less than pleasant, and the developers in the office started calling it by the name Japanese name for Godzilla,* Gojira *(the original black-and-white Japanese Godzilla films are also office favorites). As we developed our own bug tracker, and then it became an issue tracker, the name stuck, but the* Go *got dropped - hence JIRA!*
>
> *Further investigation into the name has revealed that* Gorira *is Japanese for gorilla, whilst* Kujira *is Japanese for whale. So* Gojira *is roughly translated to mean "gorilla the size of a whale"!*
>
> *For those who care - it sounds best if you yell it loudly, as though charging into battle. C'mon - try it!*

JIRA is pronounced as JEEra, based on the pronunciation of 'Kujira'.

This manual is set up in two major parts: using JIRA and administering JIRA.

1.1 Using JIRA

The chapters about using JIRA are:

- **Chapter 2: What are Issues?**
  This chapter describes what MD understands under the term issue. It also describes the types of issues that we which to track and trace using JIRA.
- **Chapter 3: Creating an Issue**
  This chapter describes the information MD wants to collect about an issue and how to create an issue using the JIRA user interface.
- **Chapter 4: Workflow of an Issue**
  After an issue is created it must be solved. This chapter is about the workflow of an issue: who does what and when to solve the issue. What states does the issue have to pass through, before it can be considered solved.
- **Chapter 5: Roles**
  This chapter explains the different roles each team member has and what they can or can't do in JIRA based on those roles.
- **Chapter 6: User Settings**
  This chapter explains what a JIRA user can configure in JIRA for him/herself. It describes how to manage the portal (homepage), how to create personal filters to filter information and how to change your preferences.

1.2 Administering JIRA

The chapters about administering JIRA are:

- **Chapter 7: Creating a New User**
  This chapter explains how to create a new user in JIRA. It also explains to which groups the user should be added to.
- **Chapter 8: Administering a Project**
  With the introduction of Project Roles, creating a new project has become a simple task overnight. This chapter explains how. It also explains how to administer a project, which can be done by the Project Lead. This includes assigning users a role in a project.
- **Chapter 9: Notifications**
  When certain events occur, like the creation of an issue, a mail is sent to inform users of the event. This chapter explains when an email is sent to whom and how to change this.

Chapter 7 is only meant for the people that administer JIRA, since only they can perform this task. Chapter 8 is interesting for Project Leads and Project Administrators, because it is their task to assign users to a role. Chapter 9 may be of interest to all users, to understand which events generate an email and which do not.

1.3 Quick Overview

To get a quick overview of JIRA, read the following chapters (see the column that applies to you):

Chapter	Project Lead	Team Lead	Project Member
3.2 'Create a New Issue' on page 15	Definitely	Definitely	Definitely
4.2 'Commenting on an Issue' on page 21	Definitely	Definitely	Definitely
4.3 'Scheduling an Issue' on page 22	Definitely	Definitely	Optional
4.12 'Setting Issue Security' on page 30	Definitely	Definitely	Definitely
5.1 'Project Lead' on page 35	Definitely	Not required	Not required
5.3 'Project Member' on page 37	Definitely	Definitely	Definitely
5.9 'Team Lead' on page 43	Definitely	Definitely	Optional
5.10 'Project Administrator' on page 43	Definitely	Optional	Optional
5.12 'Project Role Membership' on page 44	Definitely	Optional	Optional
5.13 'How To Use Project Roles' on page 46	Definitely	Optional	Optional
5.14 'Dummy Users' on page 47	Definitely	Definitely	Definitely
8.2.1 'Project Administration' on page 65	Definitely	Optional	Optional
Appendix A: 'Workflow of an Issue' on page 71	Definitely	Definitely	Definitely

Definitely = *you should definitely read this;*
Optional = *you may read this if you like;*
Not required = *you won't have much use for this.*

Also useful are the appendices:

- 'Appendix A: Workflow of an Issue' on page 71;
- 'Appendix B: Reference Cards' on page 75.

2 WHAT ARE ISSUES?

Basically, an issue is any object or concept you want to track and trace. Since that is too broad we want to narrow it down to what Managed Delivery (MD) defines as possible types of issues.

MD defines an issue as:

1. A problem with a product or deliverable:
   - that MD is developing;
   - that MD has developed and for which MD has guaranteed to give support in the period in which the problem was first reported;
   - for which MD has signed a support contract or
   - for which MD has agreed to give support based on subsequent costing.
2. A request by a customer on a product or deliverable:
   - that MD is developing;
   - that MD has developed and for which MD has guaranteed to give support in the period in which the problem was first reported;
   - for which MD has signed a support contract or
   - for which MD has agreed to give support based on subsequent costing.
3. An issue that needs to be clarified by the customer or by an MD employee and that an MD manager wishes to track using JIRA.
4. A task that needs to be done by an MD employee and that an MD manager wishes to track using JIRA.

Currently an issue can't be a new release, although release tracking may be something we wish to add to JIRA in the (near) future.

Note: in this document we talk about issues as a general term for the different kind of issues mentioned above; you can identify these different kind of issues through the type of an issue.

2.1 Bug

A bug is a problem with a product or deliverable. In JIRA deliverables are called *components*. Sometimes we don't know on which component a bug is to be attributed to. Hence a bug can also be assigned to component "unknown".

Depending on a bug's priority and the contract MD has signed with a customer a bug needs to be picked up and solved in a predetermined time span, usually measured in working hours or working days.

Bugs can be reported on all levels of development. A developer should report a bug if he finds one during unit testing. A tester should report a bug during the testing phase of a project, release or patch. A customer can report a bug during the acceptance test phase, during the guarantee period or outside the guarantee period if the customer has a signed support contract for the project with MD.

2.2 New Feature

A new feature is a part of a product or system that hasn't been developed yet. This issue type is used to track development of a new product. Since we're not doing release tracking, it's unlikely we will report issues with this issue type.

2.3 Task

A task is something a person should do. For instance, write a document or user guide. By creating the task as an issue, we can track whether the task is being done.

The assignee of the task can comment on the task and signal that he's stuck or needs help. He can also delegate the task to someone else.

2.4 Improvement

An improvement is a change in a part of a product or system that has already been developed. In MD we use change requests to determine what the change should be. Since we're not doing release tracking, it's unlikely we will report issues with this issue type.

2.5 Request for Information (RFI)

A request for information is done by a customer to ask for information about a product that MD has developed for the customer or that the customer would like to have developed by MD.

A request for information can also be done to the customer during development of a product by MD, if the customer should clarify some information or requirement.

2.6 Request for Support (RFS)

A request for support is done by a customer with a support contract with MD for the specified project. Typically, the request is fulfilled with a visit to the customer's office.

A request for support can be to help the customer implement a product or release, to (help) setup the customer's production or testing environment or to fix a problem in the customer's production or testing environment.

2.7 Risk Management

A risk management issue allows entering an issue for a single item, after which a project lead (or someone assigned by the lead) must assess the issue. The result of the assessment can be one of these:

- The issue is valid. The issue should then be approved.
- The issue is incomplete. The reporter should add extra information to allow the assessment to be completed. For this, the issue is disapproved with a resolution of 'incomplete'.
- The issue is invalid. The issue is disapproved with an appropriate resolution.

2.8 Document Management

A document management issue is about the creation or updating of a document, that needs to be published. When creating the issue the (new) version of the document should be attached.

The project lead (or someone assigned by the lead) should assess the document. If the document is correct (as concerned to it's contents), then the document is approved. If there's a problem with the document, the issue is disapproved and the reporter should resolve the issues, upload a new version and reopen the issue.

3 CREATING AN ISSUE

To create a new issue it is imperative to understand what information about an issue should go in which issue field. So we'll start this chapter with the issue fields.

3.1 Issue Fields

There is a lot of information about every single issue field that you might want to know. To present this information in a user friendly manner, I have chosen to create a table for every field with the following information:

Type	Description
Type	Type of field. Domain: Automatic (determined by JIRA), Text Field (< 255 characters), Free Text Field (> 255 characters), Select List, Multi Select List, Cascading Select List, Checkboxes, Radio Buttons, Number Field, Date Picker, Date Time, Project Picker, User Picker, Version Picker, URL Field, File.
Mandatory	Is the field mandatory (yes or no).
Domain	The domain of the field.
Default	The default value of the field or n/a if there is no default.
Permissions	Create, Read, Update and/or Delete (CRUD)
Description	A description of the field's use.

3.1.1 Id

Type	Value
Type	Automatic
Mandatory	Yes
Domain	> 0
Default	N/a
Permissions	R
Description	The id that JIRA uses to store the issue under.

3.1.2 Project

Type	Value
Type	Project Picker
Mandatory	Yes
Domain	All projects the user has the Browse Project permission for
Default	The last browsed project
Permissions	CR
Description	The project for which the issue is created. The user needs Browse Project and Create Issue permissions to create an issue.

3.1.3 Key

Type	Value
Type	Automatic
Mandatory	Yes
Domain	
Default	Concatenation of the project key and issue id fields, with a dash between them
Permissions	R
Description	This is the key with which JIRA identifies issues.

3.1.4 Summary

Type	Value
Type	Text Field
Mandatory	Yes

Type	Value
Domain	ASCII
Default	N/a
Permissions	CRU
Description	A brief summary of the issue.

3.1.5 Type

Type	Value
Type	Select List
Mandatory	Yes
Domain	Bug, New Feature, Task, Improvement, RFI, RFS, Risk, Document
Default	The previously selected option
Permissions	CR
Description	The type of the issue.

3.1.6 Affected Version/s

Type	Value
Type	Version Picker
Mandatory	No
Domain	A project's versions
Default	Unknown
Permissions	CRUD
Description	The versions that are affected by the issue (on which the bug is reproducible).

3.1.7 Assign To

Type	Value
Type	User Picker
Mandatory	Yes
Domain	The Assignable Users of a project
Default	Automatic → Project Lead / Component Lead
Permissions	CRU
Description	The assigned person becomes the new assignee of the issue. The assigned person is suppose to solve the problem or delegate it to someone else. The JIRA user needs Assign User permission to change this field.

3.1.8 Attachment

Type	Value
Type	File
Mandatory	No
Domain	The file size should be less than 1 MB
Default	N/a
Permissions	CR
Description	An attachment in the form of a file. See also images! The user needs Create Attachment permission to create attachments.

3.1.9 Images

Type	Value
Type	File
Mandatory	No
Domain	Image file (JPEG)
Default	N/a
Permissions	CR
Description	An attachment in the form of an image. JIRA has a special user interface to add screenshots. The user needs Create Attachments permission to create screenshots.

3.1.10 Component/s

Type	Value
Type	Component Picker
Mandatory	No
Domain	The components of a project
Default	Unknown
Permissions	CRUD
Description	The components that are effected by the issue.

3.1.11 Description

Type	Value
Type	Free Text Field
Mandatory	No
Domain	ASCII (with Wiki mark-up)
Default	N/a
Permissions	CRUD
Description	The long description of an issue. Put in everything you know about the issue that can be formulated in text.

3.1.12 Due Date

Type	Value
Type	Date Picker
Mandatory	No
Domain	A date, preferably in the future
Default	N/a
Permissions	CRUD
Description	The date this issue should preferably be solved. The user needs Schedule Issue permissions to be able to edit this field.

3.1.13 Environment

Type	Value
Type	Text Field
Mandatory	No
Domain	ASCII
Default	N/a
Permissions	CRUD
Description	The environment for which the issue was reported. Things like: hardware and version, operating system and version, middleware and version.

3.1.14 Platform

Type	Value
Type	Checkboxes (Custom Field)
Mandatory	No
Domain	Production, Test (acceptance), Test (integration), Test (development), Development
Default	N/a
Permissions	CRUD
Description	A simple version of environment.

3.1.15 Fix Version/s

Type	Value
Type	Version Picker
Mandatory	No
Domain	A project's versions

Type	Value
Default	Unknown
Permissions	CRUD
Description	The versions that solve this problem. Assigning a fix version to an unsolved issue schedules the issue for that particular version. This is useful when determining the workload for that version.

3.1.16 Customer Ref

Type	Value
Type	Text Field
Mandatory	No
Domain	ASCII
Default	N/a
Permissions	CRUD
Description	The reference under which the customer knows this issue. Usually this is the id of the issue in the customer's bug tracking tool.

3.1.17 Priority

Type	Value
Type	Select List
Mandatory	Yes
Domain	Blocker, Critical, High, Major, Normal, Minor, Cosmetic
Default	Normal
Permissions	CRU
Description	The severity of the problem or task. For a problem the priority indicates how problematic the issue is; for a task it indicates how soon the task should be picked up.

3.1.18 Reporter

Type	Value
Type	User Picker
Mandatory	Yes
Domain	A user that can browse the project
Default	The JIRA user that enters the issue
Permissions	CRU
Description	The user that reported the issue. It's possible to report an issue for someone else or change the reporter later, but only if the JIRA user has the Modify Reporter permission.

3.1.19 Resolutions

Type	Value
Type	Select List
Mandatory	No; mandatory for status Resolved
Domain	Fixed, Release, Won't Fix, Duplicate, Incomplete, Cannot Reproduce, Specs, Test Error, Resolved Locally, Approved
Default	Fixed
Permissions	CRU; update only possible after a Reopened, Resolved cycle
Description	The resolution for this issue; the reason for changing the status to Resolved.

3.1.20 Security Level

Type	Value
Type	Select List
Mandatory	No
Domain	End User Testing, Acceptation Testing, Delivery Testing Internal, Delivery Testing, Subcontractor, System Testing Internal, System Testing, Development, Project Management, Administration

Type	Value
Default	None
Permissions	CRUD
Description	The security level determines who can view this issue. If equal to none, then everyone can view the issue (who has Browse Project permissions for the project). If otherwise, only a select group of people can view the issue. You need Set Security permission to set and edit this field.

3.1.21 Time Tracking (Original Estimate)

Type	Value
Type	Text Field
Mandatory	No
Domain	#w #d #h #m, where # is an integer number >= 0 and w represents weeks, d represents days, h represents hours and m represents minutes (with 8 hours in a day and 5 days in a week).
Default	N/a
Permissions	CRUD
Description	Estimate for how much work is needed to solve the issue. If an original estimate is entered, logging work can subtract the time spent automatically from it to calculate the remaining estimate.

3.1.22 Remaining Estimate

Type	Value
Type	Text Field
Mandatory	No
Domain	#w #d #h #m, where # is an integer number >= 0 and w represents weeks, d represents days, h represents hours and m represents minutes.
Default	N/a
Permissions	CRUD
Description	Estimate for how much work remains to solve the issue. Can be updated automatically or manually when work is logged. User needs Work on Issues permission to update this field.

3.1.23 Time Spent

Type	Value
Type	Text Field
Mandatory	No
Domain	#w #d #h #m, where # is an integer number >= 0 and w represents weeks, d represents days, h represents hours and m represents minutes.
Default	N/a
Permissions	CR
Description	Estimate for how much work was done to solve the issue. Can be subtracted from the original estimate to produce a remaining estimate or from the remaining estimate to produce a new remaining estimate. User needs Work On Issues permission to set this field. Each work log has it's own Time Spent field.

3.1.24 Work Ratio

Type	Value
Type	Automatic
Mandatory	No
Domain	
Default	N/a
Permissions	R
Description	The value of this field is unclear.

3.1.25 Votes

Type	Value
Type	Number Field
Mandatory	No
Domain	>= 0
Default	0
Permissions	R
Description	This field gives a count of the number of people that have voted for this issue.

3.1.26 Created

Type	Value
Type	Date Time
Mandatory	Yes
Domain	Date and time
Default	System date and time
Permissions	R
Description	The creation date and time of this issue.

3.1.27 Updated

Type	Value
Type	Date Time
Mandatory	Yes
Domain	Date and time
Default	System date and time
Permissions	R
Description	The date and time of the last update of this issue.

3.1.28 Status

Type	Value
Type	Automatic
Mandatory	Yes
Domain	Open, In Progress, Reopened, Resolved, Closed
Default	Open
Permissions	R
Description	Status of an issue. The status is changed when the issue is transitioned to a new state according to the workflow of the project by authorized users.

3.1.29 Parent

Type	Value
Type	Automatic
Mandatory	No
Domain	Issue in the same project
Default	N/a
Permissions	CR
Description	The parent of a subtask. Only subtasks have parents. A subtask can be created by first selecting the parent and then choosing Create sub-task.

3.1.30 Sub-tasks

Type	Value
Type	Automatic
Mandatory	No
Domain	Issues in the same project
Default	N/a
Permissions	CR

Type	Value
Description	All subtasks of this issue. This is the reverse relation of Parent.

3.1.31 Last Comment

Type	Value
Type	Number Field
Mandatory	No
Domain	Days since last comment
Default	N/a
Permissions	R
Description	The days since the last comment was entered on the issue. Adding this field to the issue navigator will colour the text of an issue red in the navigator if the issue is unsolved and was not commented on for a certain period of time.

3.1.32 Operations

Type	Value
Type	Dummy
Mandatory	No
Domain	N/a
Default	N/a
Permissions	N/a
Description	Adding this field to the issue navigator will render a number of actions that can be performed on an issue, directly from the issue navigator.

3.1.33 Participant(s)

Type	Value
Type	Automatic
Mandatory	No
Domain	Participants in the issue
Default	N/a
Permissions	R
Description	This field holds the persons that have participated in the issue, that is they have reported the issue, they are the current assignee of the issue or they have commented on the issue.

3.1.34 Resolution Date

Type	Value
Type	Date Time
Mandatory	No
Domain	Date and time
Default	Empty
Permissions	R
Description	The date and time this issue was resolved.

3.1.35 Carbon Copy

Type	Value
Type	User Picker
Mandatory	No
Domain	Users that can view the project
Default	Empty
Permissions	CRUD
Description	Specifying users on creation of an issue in this field, will send e-mail to these people when the issue is created! The field is unused afterwards. To remain informed on an issue, these users can make themselves watchers of the issue.

3.1.36 First Response Date

Type	Value
Type	Date Time
Mandatory	No
Domain	Date and time
Default	Empty
Permissions	R
Description	The date and time this issue was first commented.

3.1.37 Last Resolution User

Type	Value
Type	Automatic
Mandatory	No
Domain	User
Default	Empty
Permissions	R
Description	The user that last resolved the issue.

3.1.38 Last Closed User

Type	Value
Type	Automatic
Mandatory	No
Domain	User
Default	Empty
Permissions	R
Description	The user that last closed the issue.

3.1.39 Last Comment

Type	Value
Type	Automatic
Mandatory	No
Domain	User
Default	Empty
Permissions	R
Description	The number of days since the last comment.

3.1.40 Time in Status

Type	Value
Type	Automatic
Mandatory	No
Domain	Date and Time
Default	N/a
Permissions	R
Description	The time that the issue has been in the current status.

3.1.41 Impact

Type	Value
Type	Free Text Field
Mandatory	No
Domain	ASCII (with Wiki mark up)
Default	Empty
Permissions	CRUD
Description	The impact that an issue has.

3.1.42 Impact Weight

Type	Value
Type	Select List
Mandatory	No
Domain	High, Medium, Low
Default	Medium
Permissions	CRUD
Description	The impact that an issue has as a weight. Only valid for issue type Risk.

3.1.43 Probability

Type	Value
Type	Select List
Mandatory	Yes
Domain	High, Medium, Low
Default	Medium
Permissions	CRUD
Description	The probability that a risk occurs. Only valid for issue type Risk.

3.1.44 Label

Type	Value
Type	Text Field
Mandatory	No
Domain	ASCII
Default	Empty
Permissions	CRUD
Description	The label allows selecting a set of for arbitrary issues, by giving them a common label. This is useful for reporting on the issues.

3.1.45 Number of Attachments

Type	Value
Type	Automatic
Mandatory	No
Domain	User
Default	Empty
Permissions	R
Description	The number of attachments associated with the issue.

3.1.46 Number of Comments

Type	Value
Type	Automatic
Mandatory	No
Domain	User
Default	Empty
Permissions	R
Description	The number of comments that are made on the issue.

3.2 Create a New Issue

To create a new issue, go through the following steps:

1. In the main menu, click on '**Create New Issue**'.
2. You are now in step 1 of 2 to create a new issue. Select the project for which you want to create a new issue and select the issue type. Then press '***Next>>***'.
3. You are now in step 2 of 2 to create a new issue. Since each project can have its own workflow and each issue type can have its own issue fields, it's not possible to give a list of fields here that must be entered. Generally there will be issue fields for a Summary, Security Level, Priority, Component/s, Affects Version/s and a Description. Of these only the Summary is mandatory, although Description might prove useful too!

   On a separate tab called 'Schedule Tab' you may (subject to permissions granted) edit fields that will schedule the issue. This includes setting the priority, assigning the issue to a certain user, setting the Due Date, etc..

   After entering appropriate values for the issue fields, press '***Create***' to create the issue.
4. You are now in the view issue screen. A number of things can be done in this screen, which will be discussed in the next chapter.

4 WORKFLOW OF AN ISSUE

After the creation of a new issue, that issue must follow a certain path to be resolved. JIRA supports this path through workflows. This chapter is about the user actions that are possible in each state of the workflow, and the roles each user has to play in the process.

For a diagram on the workflow of issues, see Appendix A: Workflow of an Issue.

Each action will be accompanied by the following information:

Information	Description
Type	The type of action. Domain: State Transition, Add Information, Delegate Issue, Manage Issue, Miscellaneous
Permission	Who has permission to execute this action
Mandatory	Is this action mandatory (and for whom)
Precondition	What precondition must be met before this action should be executed
Post condition	What is the post condition if this action is executed

4.1 After an Issue is Created

After an issue is created, a number of different actions are possible (in the order in which JIRA presents them):

- **Schedule Issue**
- **Start Progress**
- **Resolve Issue**
- Assign this issue
- Attach file to this issue
- Attach screenshot to this issue
- *Clone this issue*
- **Comment on this issue**
- **Create sub-task**
- *Delete this issue*
- *Edit this issue*
- **Link this issue to another issue**
- *Move this issue*
- *Vote for it*
- Watch it
- Log work done
- **Set Security**

The reporter of the issue can now add attachments to the issue. The reporter may also want to add him/herself to the watch list to be informed of the issues progress.

The items in bold typeset are explained in their own chapters. The other items are explained in this one. The items in italic typeset are outside the normal workflow of an issue. These actions will normally not be used in the workflow of an issue.

The order in which actions are explained, is the order in which they will usually be executed by some user in the process of resolving the issue.

4.1.1 Attach File

Information	Value
Type	Add Information
Permission	Project Lead, Current Assignee, Reporter
Mandatory	No
Precondition	None
Post condition	An attachment is linked to the issue

After an issue is created, the reporter will usually attach the original bug report as an attachment. Other attachments may be added as well, per case, either immediately after creation or at a later time.. Don't add screenshots as attachments, use Attach Screenshot for that.

To attach one file to an issue, execute the following steps:
1. In the view issue screen, click 'Attach file' to this issue.
2. Type the name of the file on the local file system in the 'Attachment' edit box or press '***Browse...***' to search for the file. Maximum file size is 10 MB.
3. Type an optional comment.
4. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
5. Press '***Attach***' to attach the file.

To attach more than one file at once, do:
1. In the view issue screen, click 'Attach file' to this issue.
2. In the attach file screen, click 'Attach multiple' files.
3. Type the names of the files on the local file system in the 'Attachment' edit boxes or press '***Browse...***' to search for the files. Maximum file size is 10 MB.
4. Type an optional comment.
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Attach***' to attach the files.

4.1.2 Attach Screenshot

Information	Value
Type	Add Information
Permission	Project Lead, Current Assignee, Reporter
Mandatory	No
Precondition	Java JRE installed and enabled
Post condition	A screenshot is linked to the issue

To create a screenshot, *you need a java JRE installed and enabled* in the browser you are using.

If this precondition is met, do:
1. In the view issue screen, click 'Attach screenshot' to this issue.
2. A popup will appear in which Java is started. Make sure you have the screenshot on the windows clipboard.
3. Press '***Paste***' to paste the screenshot.

4. Type a name for the screenshot in the 'File name' edit box. Make sure the name is descriptive and not cryptic. Use only ASCII characters. The use of *space* as word separator is *allowed*!
5. Type an optional comment.
6. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
7. Press '***Attach***' to attach the screenshot.

4.1.3 Assign

Information	Value
Type	Delegate Issue
Permission	Project Lead, Current Assignee
Mandatory	Yes, unless the Project Lead solves the issue him/herself
Precondition	None
Post condition	Assignee changes; new assignee is informed by email

When a new issue is assigned, the current assignee will usually be either the Project Lead or the Component Lead. They can decide to delegate the issue to someone else. To delegate an issue, you must assign it to someone else.

To assign an issue, do:
1. In the view issue screen, click 'Assign' this issue.
2. In the 'Assign To' select box, select the person to which the issue must be assigned.
3. Type an optional comment.
4. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
5. Press '***Assign***' to assign the selected person to the issue.

See also 'Scheduling an Issue'.

4.1.4 Schedule Issue

See 'Scheduling an Issue'.

4.1.5 Watch It

Information	Value
Type	Miscellaneous
Permission	Everyone that can browse the issue
Mandatory	No
Precondition	None
Post condition	Current user is added to the watch list; user receives email when issue is updated

If you want to be kept up to date about an issue, but you are neither the Project Lead nor the Current Assignee, you can add yourself to the watch list. You then receive the same email notifications as the Project Lead and Current Assignee.

Since the reporter of an issue is not automatically kept informed, it would be useful for him/her to add him/herself to the watch list.

To start watching an issue, do:
1. In the view issue screen, click 'Watch it'.

To stop watching an issue, do:
1. In the view issue screen, click 'Stop watching'.

4.1.6 Link

See 'Linking an Issue'.

4.1.7 Create Sub-task

See 'Sub-tasks: Breaking an Issue into Parts'.

4.1.8 Start Progress

See 'When an Issue has been Assigned to You'.

4.1.9 Resolve Issue

See 'Resolving an Issue'.

4.1.10 Log Work Done

See paragraph 4.5.1 of 'Start Working on an Issue'.

4.1.11 Edit

Information	**Value**
Type	Manage Issue
Permission	Project Lead, Current Assignee
Mandatory	No
Precondition	None
Post condition	The issue fields that were entered on creation are overwritten

To change the fields that were entered on creation of an issue, use edit. There are only three reasons to do this:
- One or more fields were entered incorrectly.
- The original estimate was never entered and you wish to do that now.
- The security level of the issue must be changed.
- The reporter of the issue needs to be changed (to transfer certain permissions to someone else).

To edit an issue, do:
1. In the view issue screen, click 'Edit' this issue.
2. Change the fields that were incorrectly entered or fill in an estimate.
3. Type a comment. The comment field is optional, but in this case, you **must** enter a comment.
4. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
5. Press '***Update***' to commit your changes.

4.1.12 Delete

Information	Value
Type	Manage Issue
Permission	Administrators
Mandatory	No
Precondition	None
Post condition	The issue is permanently removed

Don't delete an issue. It's better to change the security level to hide the issue, than it is to delete the issue completely (see 'Edit').

To delete an issue, do:
1. In the view issue screen, click 'Delete' this issue.
2. Press '***Delete***' to confirm the action.

4.1.13 Clone

Information	Value
Type	Manage Issue
Permission	Project Lead, Reporter
Mandatory	No
Precondition	None
Post condition	A new issue is created, which is a clone of the original

Don't clone an issue. Because we don't want duplicate issues, it is nonsense to create a clone.

To clone an issue, do:
1. In the view issue screen, click 'Clone' this issue.
2. Type a new summary in the 'Summary' edit box.
3. Press '***Create***' to clone the issue.
4. Comments, screenshots, etc. are not cloned.

4.1.14 Move

Information	Value
Type	Manage Issue
Permission	Project Lead, Reporter
Mandatory	No
Precondition	The user needs the 'Create Issue' permission on the new project for this action to succeed
Post condition	The issue is deleted from the old project and added to the new project

Moving an issue is only necessary if the reporter has created an issue on the wrong project or if the wrong issue type was selected.

To move an issue, do:
1. In the view issue screen, click 'Move' this issue.
2. You are now in step 1 of 4. Choose the new project (in the 'New Project' select box) and/or issue type (in the 'New Issue Type' select box).
3. Press '***Next>>***' to go to the next step.

4. If the status of the issue was Open, then step 2 is skipped automatically (skip to bullet 6.). Otherwise you are now in step 2 of 4. Choose the new status in the 'New Status' select box.
5. Press '***Next>>***' to go to the next step.
6. You are now in step 3 of 4. Choose the assignee in the 'Assign To' select box, or select 'Automatic'.
7. Press '***Next>>***' to go to the last step.
8. You are now in step 4 of 4. Press '***Move***' to move the issue.

4.1.15 Vote For It

Information	Value
Type	Miscellaneous
Permission	Everyone that can browse the issue, but not the reporter
Mandatory	No
Precondition	You haven't voted for the issue yet
Post condition	Your vote is added to the list of voters

If you vote for an issue, this means you think it is important. The issue should be resolved as soon as possible, or a new feature should be implemented. Since the customer decides which features will be implemented and which bugs should be solved, we don't use voting.

To vote for an issue, do:
1. In the view issue screen, click 'Vote for it'.

To withdraw your vote.
1. In the view issue screen, click 'Unvote'.

4.1.16 Set Security

See 'Setting Issue Security'.

4.2 Commenting on an Issue

Information	Value
Type	Add Information
Permission	Project Lead, Current Assignee
Mandatory	No
Precondition	None
Post condition	A comment on an issue is added to the issue

There are many different reasons to add a comment to an issue. Here are some of them:
- There is extra information available, beyond the initial description.
- You have a question.
- You have an answer to a question.
- *You had a telephone conversation with the client about the issue.*
- You need to add an analyses of the issue. Since the issue is yet to be fixed, you cannot resolve it, yet. In many cases the client must now choose if and when the issue is to be solved.

To add a comment, do:

1. In the view issue screen, click 'Comment' on this issue.
2. Type your comment in the 'Comment' text area.
3. Make sure that the 'Viewable By' select box is set to 'All Users'.
4. Press '***Add***'.

4.3 Scheduling an Issue

Information	Value
Type	Delegate Issue
Permission	Project Lead, Team Lead
Mandatory	In certain cases
Precondition	None
Post condition	The issue is scheduled for a date (Due Date), a version (Fix Version) or a person (assignee).

Scheduling an issue is important to have the issue solved at the right time. Issues can be scheduled automatically, but the functionality in JIRA for this is limited. Some manual scheduling is normally required.

There are different forms of scheduling. You can schedule an issue on a date (when should it be solved), on a version (in which version should it be solved), to a person (who should solve the issue) or any combination of these.

To schedule an issue, do:
1. In the view issue screen, click 'Schedule Issue'.
2. Set a (new) priority, Due Date, Original Estimate, Security Level and/or (new) assignee.
3. Type your comment in the 'Comment' text area (optional).
4. Make sure that the 'Viewable By' select box is set to 'All Users' or an appropriate project role.
5. Press '***Schedule Issue***'.

4.4 When an Issue has been Assigned to You

How do I know when an issue is assigned to me? What should I do, when an issue is assigned to me?

The first question is easily answered: when an issue is assigned to you, you receive an email, informing you of the fact. The email contains the issue identification number. The identification number consists of four parts:
1. The first part is the **division** that is handling the project for which an issue has been created, that is **MD**.
2. The second part is the **customer code** for which the project is being done.
3. The third part is the **project code** for which the issue was created.
4. The last part is the **sequence number** of the issue.

With this information, you can now lookup the issue in JIRA. So:
1. Surf to http://jira.sogeti.nl
2. You are now in the home page of JIRA. You are looking at the dashboard.

3. In the upper left corner you see a box titled Open Issues: 'Assigned To Me', followed by a list of issues. The issue you have just been assigned to should be somewhere in the list. Click on the issue id.

   The list contains a maximum of 5 items; if the new issue isn't there, click '**Assigned To Me**' to see all issues assigned to you in the issue navigator. From there you can find and select the new issue.
4. Alternatively, you can click the link in the email message that will bring you to the view issue screen of the particular issue directly.
5. You are now in the view issue screen. Depending on your permissions you can do a number of things. See 'After an Issue is Created' for a complete list.
6. Read the issue description carefully. Read the comments and work log if there are any. Look at the screenshots and open the attachments if any.
7. Depending on your project role, you should now do one of the following things:
   - If you are the Project or Component Lead, decide if you want to resolve the issue yourself or if you want to assign it to someone else. To assign an issue to someone else, see 'Assign' this issue. Alternatively, you may want to schedule the issue; see 'Scheduling an Issue'.
   - If you are not the Project or Component Lead and think you can't handle the issue or the issue should not have been assigned to you, contact the Project Lead or a Team Lead. He will then assign the issue to someone else.
   - If you are going to try to resolve the issue, then see 'Start Working on an Issue'.
8. If you are not going to resolve the issue yourself, you are of course still free to comment on the issue if you have something to add. The Project or Component Lead may give hints to the person they are going to assign the issue to, by adding a comment for instance.

4.5 Start Working on an Issue

Information	Value
Type	State Transition
Permission	Project Lead, Current Assignee
Mandatory	Yes
Precondition	You are the assignee of the issue
Post condition	The issue's status is changed to 'In Progress'.

When you are going to resolve the issue, this is what you should do:

1. In the view issue screen, click on 'Start Progress'.
2. If there are any details that need clearing up, call the customer. In a maintenance situation the reporter will usually also be the customer, so you know whom to contact.
3. After contacting the customer, make sure to report on the conversation by adding a comment. See 'Commenting on an Issue'.
4. Next, do your analyses of the issue.

4.5.1 Log Work Done

Information	Value
Type	Add Information
Permission	Project Lead, Current Assignee

Information	Value
Mandatory	Yes
Precondition	You are the assignee of the issue
Post condition	A work log is added to the issue

While you keep working on an issue, make sure to keep track of your progress by regularly logging work done, as follows:

1. In the view issue screen, click 'Log work done'.
2. In the 'Time Spent' edit box, fill in the amount of work done (in weeks, days, hours and or minutes).
3. In the 'Adjust Estimate' radio buttons choose the appropriate value: 'Auto adjust' to subtract the time spent from the current estimate, 'Estimate unknown' if an estimate can't be given or 'Set estimated time remaining'. If the last value is chosen the edit box below (for the new estimate) is mandatory.
4. Explain what you have been doing in the 'Work Description' text area.
5. Make sure that the 'Log Viewable By' select box is set to 'All Users'.
6. Press '***Log***' to log the work you have done.

The work log is not the same as a comment. In the work log you explain the actions you have been doing. In a comment you describe the outcome of the actions. Typically you enter a work log and a comment at the same time. See 'Commenting on an Issue' on how to comment on an issue.

4.6 Stop Working on an Issue

Information	Value
Type	State Transition
Permission	Project Lead, Current Assignee
Mandatory	In certain situations
Precondition	You are working on the problem now
Post condition	The status of the issue is changed to 'Open' or 'Resolved'

When should you stop working on a problem? There are a number of different reasons to stop working on a problem:

1. You have finished your analyses and the issue is resolved to something that you can't solve in the application (for instance a testing error).
2. You have finished your analyses and the issue appears to be a duplicate of an earlier issue.
3. You have finished your analyses and the issue needs to be fixed in the application.
4. You are stuck. You either need more or new information or the issue will never be solved. The issue might also be impossible to reproduce.

4.6.1 Can't Solve

If the analyses indicates that the issue is a problem that can't be solved in the application, you must resolve the issue to the appropriate resolution. See 'Resolving an Issue' for an explanation of how to resolve the issue.

4.6.2 Duplicate

If the issue was previously reported under another issue number, you must create a duplicate link. See 'Linking an Issue' to found out how. Further more, you must resolve this issue to be a duplicate. See 'Resolving an Issue'.

If the previous issue is still open or in progress, or the issue was incomplete or not reproducible, then contact you Project Lead to find out what you should do: drop the issue or start working on the duplicate issue. If the issue is resolved, contact your Project Lead to find out if the issue needs to be reopened (if appropriate).

4.6.3 Needs Fix

If the issue needs to be fixed, add a comment detailing the analyses, then contact your Project Lead to find out if the issue should be fixed immediately or at a later time.

If the issue should be fixed immediately, continue working on the problem until the issue is fixed, logging your work and commenting when appropriate. When a fix is ready (and tested), resolve the issue as a fix. See 'Resolving an Issue'.

If the issue should be fixed at a later time, then you should stop working on a problem. Do:

1. In the view issue screen, click 'Stop Progress'.
2. Add a comment (see 'Commenting on an Issue') detailing why you stopped working on the issue (usually: waiting for customer decision).
3. Log your work so far (see paragraph 4.5.1 of 'Start Working on an Issue').

4.6.4 Stuck

If you're stuck, first contact your Project Lead. He decides if you should:

- Resolve the issue to either 'Incomplete' or 'Cannot Reproduce'.
- Contact the reporter to ask for more information.
- Drop the issue, where upon the Project Lead will assign someone else.

To resolve the issue, see 'Resolving an Issue'. After contact with the reporter, add a comment (see 'Commenting on an Issue'). You now need to decide if you're still stuck (contact your Project Lead again) or if you can continue the analyses (keep working on the problem).

If the Project Lead orders you to drop the issue, do:

1. In the view issue screen, click 'Stop Progress'.
2. Add a comment (see 'Commenting on an Issue') detailing why you stopped working on the issue (stuck).
3. Log your work so far (see paragraph 4.5.1 of 'Start Working on an Issue').
4. If the Project Lead asked you to assign someone else, then assign the issue to that person (see 'Assign' this issue).

4.7 Resolving an Issue

Information	Value
Type	State Transition

Information	Value
Permission	Project Lead, Current Assignee
Mandatory	Yes
Precondition	You are working on the problem; the issue's status is 'In Progress'
Post condition	The status of the issue is changed to 'Resolved'

Resolving an issue means that you document what the end result of the issue is. It does not necessarily mean that the problem described in the issue is fixed. That may be the ultimate goal, but not al issue end as being fixed.

To resolve an issue, do:

1. In the view issue screen, click 'Resolve Issue'.
2. Choose the resolution for this issue in the 'Resolution' select box.
3. Choose the version of the application that fixes the problem or 'Unknown' if not applicable in the 'Fix Version/s' multi select box.
4. Assign the issue to the Project Lead, a tester, the reporter or a dummy user.
5. Detail the resolution in the 'Update Comment' text area.
6. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
7. Press '***Resolve***'.

In MD we recognize the following resolutions: Fixed, Release, Won't Fix, Duplicate, Incomplete, Cannot Reproduce, Specs, Test Error, Resolved Locally. These reasons are explained in detail in their own paragraphs.

4.7.1 Fixed

The problem underlying an issue is fixed. A *patch* for the application is available, a new version of the document correcting the typo is ready, a task is done.

A patch or a new version of a document must be fixed in a branch in the version control system. The branch name must be equal to 'patch-branch-<release-number>.<patch-number>'. In the commit comment the entire issue id must be named.

4.7.2 Release

The problem underlying an issue needs to fixed, but the customer has decided to postpone the fix until the next release. When work on the new release starts, this issue needs to be reopened and fixed IN A SEPARATE PATCH BRANCH!

4.7.3 Won't Fix

This is an issue that we could fix, but we won't. The reason for this is detailed in the update comment. A possible reason is that it is technically not feasible to fix the problem.

4.7.4 Duplicate

This issue was reported before in a different issue. A duplicate link is available, linking this issue to the earlier issue.

4.7.5 Incomplete

Not enough information is available to complete the analyses of the issue. Because the required information cannot be retrieved (for instance, it has been deleted) we cannot fix the problem.

4.7.6 Cannot Reproduce

The problem cannot be reproduced, not even on the platform it was originally reported on. Because it can't be reproduced, we cannot fix the problem.

4.7.7 Specs

The cause of the problem is a discrepancy in or a limitation of the requirements. The specifications of the project need to be changed, through a change request. Therefore the problem cannot be solved as an issue.

4.7.8 Test Error

The issue is caused by a testing error. The precondition of the test was not met, the test execution was done wrong, the test specification was in error, the tester has misread the documentation.

In a production environment this resolution indicates that the application works as designed. In most cases the user was simple not familiar enough with the application or the functionality of the new release was not clear to them.

4.7.9 Resolved Locally

The issue was caused by something the client or tester was able to solve himself (with or without help). No changes were made to the application and configuration.

Setting this resolution means that the reporter was able to solve the issue by changing something in the environment. Note that it's important to specify what the user did to resolve the issue, as it may occur again in the future!

4.8 Closing an Issue

Information	**Value**
Type	State Transition
Permission	Reporter
Mandatory	Yes
Precondition	The issue's status is 'In Progress' or 'Resolved'
Post condition	The status of the issue is changed to 'Closed'

An issue can only be closed, if the issue has been resolved. If the status of the issue is either 'Open' or 'In Progress', a resolution needs to be added on closing the issue. Only if the reporter is also the person that solved the problem can the issue be closed, without first being transitioned to Resolved.

To close an issue, do:

1. In the view issue screen, click 'Close Issue'.

2. If the status of the issue was not Resolved, select a resolution from the 'Resolution' select box and select the fix versions in the 'Fix Version/s' multi select box, if appropriate, else set it to 'Unknown'.
3. Assign the issue to the Project Lead with the 'Assign To' select box.
4. Comment on the issue in the 'Update comment' text area.
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Close Issue***'.

4.9 Reopening an Issue

Information	Value
Type	State Transition
Permission	Project Lead, Current Assignee
Mandatory	No
Precondition	The issue's status is 'Resolved' or 'Closed'
Post condition	The status of the issue is changed to 'Reopened'

There are two statuses from which you can reopen an issue, each with it's own reasons:

Original status	Reasons to reopen
Resolved	• The issue was fixed according to the developer, but during the test phase the problem was still reproducible. • The reporter disagrees with the assessment that this issue was either 'Incomplete', 'Cannot Reproduce' or a 'Test Error'. • The reporter disagrees with the assessment that the issue should be solved by changing the requirements ('Specs').
Closed	• The problem was fixed, but recurs in a different platform or component. • The problem was fixed, but recurs in a later version of the product. • The fix doesn't solve the problem on the production platform (and the issue was closed after completing the acceptance test).

Reopening an issue should always be done with great care and deliberation. Should a new issue be created or should an existing issue be reopened? The issue could very well be caused by something completely unrelated, but the reporter often cannot tell beforehand.

When in doubt, you should therefore create a new issue, instead of reopening an existing one. Furthermore, you should name the issue, of which this issue is possibly a duplicate, in the description or a separate comment.

To reopen an issue, do:

1. In the view issue screen, click 'Reopen Issue'.
2. In the 'Assign To' select box, select either 'Automatic' or the developer that resolved the issue.
3. Type a comment in the 'Update comment' text area detailing the reason why the issue was reopened. Be clear, precise and complete in your explanation.
4. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
5. Press '***Reopen Issue***'.

4.10 Linking an Issue

Information	Value
Type	Add Information
Permission	Project Lead, Current Assignee, Reporter
Mandatory	No
Precondition	None
Post condition	An issue link is created linking this issue to another

Currently MD only offers the possibility to link duplicate issues. If release tracking is added to JIRA, linking an issue to a 'New Release' issue will also made be possible.

A link should therefore only be created if and only if an issue is a duplicate of another (or is being duplicated by another).

To link an issue, do:

1. In the view issue screen, click 'Link' this issue to another issue.
2. Select the link type in the 'This issue' select box. Currently only 'duplicates' and 'is duplicated by' are supported. Choose the appropriate value.
3. Type an issue id in the 'Issue' edit box or choose an issue in the '[select issue]' popup. It's possible to type or select more than one issue!
4. Type an optional comment in the 'Update comment' text area
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Link***'.

4.11 Sub-tasks: Breaking an Issue into Parts

Information	Value
Type	Manage Issue
Permission	Anyone with 'Create Issue' permission for the project
Mandatory	No
Precondition	None
Post condition	A new issue is created, which is a subtask of this one

Subtasks are mostly used for task-like issues, to break them into smaller parts. This is useful if the issue should be handled by more than one person. Each person can then be given their own subtask, detailing what is expected of them. Each person can then work on the issue independently from everyone else (disregarding interdependencies)

Currently only the 'Sub-task' subtask is supported. Others may be added when a need arises.

To create a subtask, do:

1. In the view issue screen, click 'Create' sub-task.
2. You are now in step 1 of 2. Select the subtask issue type in the 'Issue Type' select box.
3. Press '***Next>>***'.
4. You are now in step 2 of 2. Type a summary for the subtask in the 'Summary' edit box.
5. Select the priority in the 'Priority' select box.
6. Select the affected components in the 'Component/s' multi select box.

7. Select the affected versions in the 'Affects Version/s' multi select box.
8. In the 'Assign To' select box, select either 'Automatic' or the project member to which the subtask is to assigned.
9. In the 'Reporter' edit box type the name of the reporter or select it form the popup.
10. In the 'Environment' text area detail the environment for which the subtask is to be done, if appropriate.
11. Give a detailed description of the subtask in the 'Description' text area.
12. Give an 'Original Estimate' if appropriate.
13. Press '***Create***' to create the subtask.
14. You are now in the view issue screen of the subtask. To return to the original issue, click the name of the original issue above the name of the subtask.
15. To create more subtasks, either click 'Create' sub-task again or in the 'Sub-tasks' area behind '**New**' fill in a summary, select an Issue Type and an assignee and press '***Add***'.

4.12 Setting Issue Security

Information	Value
Type	Manage Issue
Permission	Project Lead, Team Lead, Reporter
Mandatory	No
Precondition	None
Post condition	The issue is visible to some users, while it is invisible to others.

Issue security is important to make sure users only see the issues they have permission for. Setting the issue security to 'None' makes an issue **visible** to everybody that can view the project.

Some issues are only important for certain roles. Development issues should only be visible to developers. Testing internal issues should only be visible to testers.

While it may not seem important to get the security level right at the start of the project, new users may be granted access to the project at a later stage (specifically customers). At that point it may be necessary to change the security level of all issues (closed or not).

To set the security level of a single issue, do:
1. In the view issue screen, click 'Set Security'.
2. Select the appropriate security level in the 'Security Level' select box.
3. Add an optional comment.
4. Press '***Set Security***' to change the security of the issue.

Note that the security level can also be edited in the edit issue screen.

To set the security level of a group of issues, do:
1. In the issue navigator select the issues for which you want to change the security level.
2. Click 'Bulk Change: all ## issue(s)' or 'current page' (in the upper right corner).

3. Select the issues you want to change by checking the checkbox in front of the issue. By checking the box in the header of the table, you can check all checkboxes at once.
4. Press '***Next>>***'.
5. Choose 'Transition Issues' by clicking the radio button and press '***Next>>***' again.
6. Depending on the status of the issue, you will have to do the bulk change once or more often. The 'Set Security' operation is defined once for every status. Select the 'Set Security' transition you want to perform now by clicking the radio button.
7. Press '***Next>>***'.
8. Check the 'Change Security Level' checkbox and select the new security level in the select box.
9. Also specify **if email should be sent** to notify people of the change by checking or un-checking the 'Send mail for this update' checkbox.
10. Press '***Next>>***' again.
11. If you are satisfied by the changes you are about to make, press '***Confirm***'. Otherwise, go back one or more steps and redo the operations from there.
12. Repeat these steps if necessary from step 2.

4.13 State of an Issue

The state (or status) of an issue is important for what you can do with an issue and what your responsibilities are in respect to an issue. In JIRA, state transitions are handled by steps in a workflow. You cannot change the state of an issue by editing an issue.

In this paragraph the steps in a workflow are explained by looking at the states of an issue. For each state it is explained to what other state the issue can be transitioned, who has permission for this and what operation is coupled with this transition change.

4.13.1 Open

A new issue is always create with a status equal to 'Open'. 'Open' means that no one is working on the issue right now. The issue is waiting to be (re)assigned.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Start Progress	In Progress	Current Assignee	Start working on an issue; this is the normal transition for this state
Resolve Issue Done	Resolved Finished	Project Lead, Current Assignee	Resolve the issue immediately; only happens if the project lead is already familiar with the issue
Close Issue	Closed	Reporter, Project Lead, Team Lead	Close the issue; basically this means that the reporter withdraws the issue

4.13.2 In Progress

This means the issue is being worked on, specifically by the Current Assignee.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Stop Progress	Open	Current Assignee	Stop working on an issue; you are stuck, the Project Lead should assign someone else
Resolve Issue Done	Resolved Finished	Project Lead, Current Assignee	Resolve the issue; this is the normal transition for this state

4.13.3 Resolved

When a **bug** has the status resolved, this means that a resolution is available for the issue. A resolution can be a solution for a problem, but can also be that the problem cannot be reproduced or not enough information is available to come to a solution.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Issue Checked	Checked	Current Assignee	Indicates that the resolution of the issue was checked and approved; this means that the assignee agrees with the resolution of the issue
Reopen Issue	Reopened	Project Lead, Current Assignee	Reopen the issue; this means that a problem was found with the solution or the reporter does not agree with the resolution of the issue

4.13.4 Finished

Tasks (and sub-tasks, RFI and RFS issues) that are done, get the status finished. This means that the task is complete. No resolution needs to be specified, as this is hardly appropriate for a task.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Close Issue	Closed	Reporter, Project Lead, Team Lead	Indicates that the task was verified and indeed completed
Reopen Issue	Reopened	Project Lead, Current Assignee	Reopen the issue; this means that a problem was found with the solution or the reporter does not agree with the resolution of the issue

4.13.5 Checked

Bugs that are checked, are bugs that were resolved and someone else in the team agreed that the resolution was satisfactory. Who this other team member is, can vary per project. In some projects it may be another developer that checks issues. In other projects this must be done by the test team.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Close Issue	Closed	Reporter, Project Lead, Team Lead	Indicates that the issue was verified by the reporter and solved
Reopen Issue	Reopened	Project Lead, Current Assignee	Reopen the issue; this means that a problem was found with the solution or the reporter does not agree with the resolution of the issue

4.13.6 Closed

This status means that the reporter agreed with the resolution. He has closed the issue to make it clear that no more work is necessary on the issue.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Reopen Issue	Reopened	Project Lead, Current Assignee	Reopen the issue; this means that a problem was found with the solution

4.13.7 Reopened

This means that there was a resolution for the issue, but either a problem was found with the solution or the reporter didn't agree with the resolution. In both cases a detailed comment should be available to help the developer to work on the problem.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Start Progress	In Progress	Current Assignee	Start working on an issue; this is the normal transition for this state
Resolve Issue	Resolved	Project Lead, Current Assignee	Resolve the issue; this only happens if there was an error in the issue administration: the wrong resolution was provided
Close Issue	Closed	Reporter	Close the issue; this happens when the reporter is convinced of the correctness of the original resolution

4.13.8 Assessing

This is the same as 'In Progress', except that it's for a Risk or Document management issue. 'Start Progress' and 'Stop Progress' are called 'Start Assessing' and 'Stop Assessing' instead.

4.13.9 Not Approved

This means that the issue is not approved. It either needs more work (for the reporter) or the issue is not valid. The comment should indicate what the reporter needs to do.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Reopen Issue	Reopened	Reporter, Project Lead	Reopen the issue with new comments added
Close Issue	Closed	Reporter	Close the issue; this happens when the reporter agrees with the resolution

4.13.10 Approved

This means that the issue is approved. The assessor agrees that the issue is valid. In case of a Document management issue, this means that the new document can be published.

From this status the following transitions are possible:

Operation	New status	Permission	Description
Close Issue	Closed	Reporter	Close the issue; this happens when the issue is finished/becomes out of scope

5 ROLES

In chapter 4 we looked at how to resolve an issue, from the view of the issue itself. In this chapter we look at the roles people play in the project and in the issue resolution process.

For each role it is specified what a person with that role should do and when. Some roles are static, other roles are assigned dynamically during the process of resolving an issue.

The dynamic roles are roles that JIRA supports. For the dynamic roles it will be explained when a person is assigned the role and when the person is unassigned.

5.1 Project Lead

The Project Lead is a static role. The role is assigned to a person on creation of a project. A Project Administrator can reassign the role to someone else.

A Project Lead can create issues with security level 'Project Management'. These issues are only visible to the Project Lead.

The following tasks can be done by the Project Lead:

Task	When	Description
Administer Projects (8.2)	• immediately after project creation • when a new component is added to the project • when a new version is released • when users need to be given a role in the project	Change the projects description; add components and versions; view (project) members and change the project role membership.
Create Issues (3.2)	• if the customer is not authorized to add issues and an issue is reported by the customer • if a task needs to be done	Create a new issue.
Edit Issues (4.1.11)	• if an estimate is to be given for the issue • If the issue security level must be changed (see also Schedule Issue below)	Change the issue fields that were originally entered when the issue was created.
Schedule Issue (4.3)	• if an issue should be resolved before a certain date and/or time • if an issue should be resolved in a certain version • if someone (else) should be assigned to the issue (see Assign Issue below) • if an estimate is to be given for the issue • If the issue security level must be changed	Enter a due date for an issue; enter a fix version for an unresolved issue; assign the issue to someone; change the original estimate; set the security level of an issue.
Assign Issue (4.1.3)	• if a customer creates a new issue and it's assigned to the Project Lead • if the Current Assignee is stuck • if the issue needs to be tested by a tester (see Schedule Issue above)	Assign a Project Member to an issue.
Resolve Issue (4.7)	• if the Current Assignee is no longer working on an issue and a resolution is	Resolve an issue.

Task	When	Description
	available	
Close Issue (4.8)	• if an issue is resolved and the Reporter agrees with the resolution	Close the issue.
Modify Reporter (5.4.1)	• if the Project Lead enters an issue for someone else (a customer for instance)	Change the person who is registered to be the reporter of this issue.
Add Comments (4.2)	• if the Project Lead has something to add to the description the customer gave for the issue • if the Current Assignee needs a hint on how to go about resolving the issue	Add a comment on the issue.
Delete Issues	• if an issue has been raised that needs to be permanently removed • if a comment has been made that needs to be permanently removed • if an attachment has been attached that needs to be removed	Delete an issue, comment or attachment.
Work on Issues (4.5.1)	• if the Project Lead helped to resolve the issue	Log work done.
Link Issues (4.10)	• if the issue turns out to be a duplicate of another issue	Link this issue to another issue.
Create Attachments (4.1.1, 4.1.2)	• if the customer send an attachment by email • if the Project Lead was able to reproduce the issue and a screenshot will be helpful	Add an attachment to the issue.
Manage Watcher List (4.1.5)	• if someone needs to be added or deleted from the watchers list and that person is unable to do this himself	Edit the list of watchers for an issue.
Set Issue Security (4.12)	• on issue creation the security level should be set to an appropriate level • if the issue needs to be hidden from certain people • if the issue needs to be visible for certain people	Hide the issue from certain people or make it available for them.

5.1.1 Project Lead Backup

A Project Lead Backup has the same rights and privileges as a Project Lead, but is a normal role. Therefore, more than one person can have this role. The role was introduced as a backup for the Project Lead, in case the project leader is absent or needs to share his abilities.

The following use cases are recognized:

- *The Project Lead is going on vacation and a backup is temporarily instated.*
  Assign the backup the Project Lead Backup role. Remove the role when done.
- *The Project Lead is being replaced permanently.*
  Assign the new project leader the Project Lead Backup role. After the handover, assign the old project leader the Project Lead Backup role, make the new project leader the Project Lead and remove the Project Lead Backup role from the new project leader (in that order). The old project leader can still help the new one for some time. If this is no longer necessary, remove the Project Lead Backup role from the old project leader.
- *The Project Lead has an aid.*
  If the project leader has an aid, it may be useful to assign the Project Lead Backup

role to the aid, as this allows full control over the project and creates the ability to view all issues (instead of only some).

5.2 Component Lead

The Component Lead is also a static role. The Project Lead and Project Administrators can assign a Component Lead to a Component when he is administering a project. After assigning a Component Lead, the Component Lead can be configured to be the default assignee of newly created issues on that particular Component.

When an issue is created and automatically assigned to the Component Lead, the Component Lead should do one of two things:
- either solve the issue himself as the Issue Assignee (see 5.5) or
- assign the issue to someone else.

If the Component Lead decides to assign another user, it might be useful to become a watcher for the issue (see 4.1.5 'Watch It'). Otherwise the Component Lead is not kept up to date about the issue.

5.3 Project Member

A Project Member is someone who takes part in a project. This includes the project leader (see 5.1 'Project Lead'), the functional designer, testers and developers. We recognize a number of different roles for Project Members (described below), besides the Project Lead. The Project Role Membership can be edited by the Project Lead and Project Administrators.

A Project Member assumes the task of Issue Reporter or Issue Assignee during the life cycle of an issue. This includes all the tasks involved in those roles.

Besides the tasks granted by these roles, a Project Member has the following tasks available for all issues:

Task	When	Description
Create Issues (3.2)	• if an issue has been found • if a task needs to be done	Create a new issue.
Add Comments (4.2)	• if the Project Lead has something to add to the description the customer gave for the issue • if the Current Assignee needs a hint on how to go about resolving the issue	Add a comment on the issue.
Create Attachments (4.1.1, 4.1.2)	• if the customer send an attachment by email • if the Project Lead was able to reproduce the issue and a screenshot will be helpful	Add an attachment to the issue.
Watch an Issue (4.1.5)	• if the Project Member wishes to be informed about developments on an issue that he is neither the Reporter nor the Current Assignee of.	Watch an issue, that is get email about developments on an issue.

5.3.1 Sogeti Developer

This is the normal development role. This includes the (functional) designers, database administrators and programmers. A developer can create issues with security level 'Development'. These are only visible to developers.

5.3.2 Subcontractor

This is an extra development role, specifically introduced to be able to do projects with subcontractors. Use this when a subcontractor builds a **part** of a project and Sogeti another part (or when Sogeti does the integration of the parts).

This way we can keep the issues of subcontractors and the issues of Sogeti separate.

Subcontractors can create issues with security level 'Subcontractor', that are only visible to subcontractors and Sogeti developers.

5.3.3 System Tester

There are a number of different testing roles, each responsible for a different kind of test. The system tester is responsible for testing individual parts of a project. System testing may be done by functional designers or professional testers.

When working in conjunction with a subcontractor, system testing should be testing the parts that Sogeti builds.

A system tester can create issues with security level 'System Testing Internal', that are only visible to system testers. They can also create issues with security level 'System Testing', that are visible to system testers and Sogeti developers. Note that subcontractors cannot see these issues.

5.3.4 Delivery Tester

The delivery tester tests the entire delivery; they perform an integration test. Delivery testing is usually done by professional testers.

When working in conjunction with a subcontractor, delivery testing should also do an acceptation test of the subcontractor parts. By putting that responsibility here, we can keep the Sogeti internal issues hidden from subcontractors.

Delivery testers can create issues with security level 'Delivery Testing Internal', that are only visible to delivery and system testers! They can also create issues with security level 'Delivery Testing', that are visible to delivery and system testers, Sogeti developers and subcontractors.

5.3.5 Acceptation Tester

The acceptation test is the responsibility of the customer. If the acceptation test succeeds, this means that the customer has accepted the delivery. Acceptation testing is usually done by the customer, although professional (Sogeti) testers may also be hired to perform the test.

Note that acceptation testers are considered normal project members.

Acceptation testers can create issues with security level 'Acceptation Testing', that are invisible to end user testers.

5.3.6 End User Tester

A customer may involve end users to perform their own test. Acceptation testing is often done by application managers. End users are the people that will actually use the finished product. There may be political or practical reasons to make sure that end users can only see their own issues. By creating a separate role, this can be easily supported.

End users have a more limited project role. They cannot be assigned to an issue, unless they are the reporter of the issue. Further more, they cannot create comments and attachments unless they are the reporter of the issue.

End users can create issues with security level 'End User Testing', that are visible to everyone. This is basically the same as security level 'None'.

5.3.7 Project Lead Backup

This is a convenience role. If the project lead is temporarily unavailable, someone else can take over the project. Permissions and tasks are identical to the 'Project Lead'.

5.4 Issue Reporter

The Issue Reporter is the person that reported the issue. This is a dynamic role. Anyone who can create an issue, can be the reporter. The Project Lead may create an issue for a Customer.

The Issue Reporter can perform the following tasks:

Task	When	Description
Move Issue (4.1.14)	• if the issue was created on the wrong project • if the issue was created under the wrong issue type	Move the issue to another project or change the issue type.
Close Issue (4.8)	• if an issue is resolved and the Reporter agrees with the resolution	Close the issue.
Modify Reporter (5.4.1)	• if the Project Lead enters an issue for someone else (a customer for instance) • if the tester enters an issue for the customer • if the customer enters an issue for an end user	Change the person who is registered to be the reporter of this issue.
Add Comments (4.2)	• if the Reporter has something to add to the description he gave for the issue • if the Reporter wants to react on a comment by someone else	Add a comment on the issue.
Link Issues (4.10)	• if the issue turns out to be a duplicate of another issue • if the issue is related in some other way to another issue	Link this issue to another issue.
Create Attachments (4.1.1, 4.1.2)	• if an attachment is required to further explain the problem • if the Reporter was able to reproduce the issue and a screenshot will be helpful	Add an attachment to the issue.
Set Issue Security (4.12)	• on issue creation the security level should be set to an appropriate level	Hide the issue from certain people or make it available for them.

Task	When	Description
	• if the issue needs to be hidden from certain people • if the issue needs to be visible for certain people	

5.4.1 Modify Reporter

The Reporter of an issue can only be changed when the issue is created (3.2) or edited (4.1.11). This means that the Reporter can be changed on creation by anyone who has Create Issue permissions.

The Reporter can only be changed at a later time when the Reporter also has Edit Issue permissions. Note that the Reporter does not have this permission through his Reporter role. The Reporter has to be either the Project Lead or the Current Assignee.

5.5 Issue Assignee

The Issue Assignee, or Current Assignee, is the person that is assigned to the issue to help resolve it. In the Life Cycle of the issue, this person may change repeatedly.

If a customer (an acceptation tester or end user tester) reports an issue, the Assignee changes as follows:
- When the issue is created the Project Lead or Component Lead is assigned automatically.
- The Project/Component Lead or a Team Lead will assign the issue to a Project Member (usually a developer). It may be useful to schedule the issue as well (see 4.3 'Scheduling an Issue').
- If the analyses is finished, the Current Assignee will assign the Project/Component Lead again.
- If the issue needs to be fixed, the Project/Component/Team Lead will assign the issue to a Project Member again, possibly the same person that did the analyses. (In a project, it may be the procedure to skip this and the previous step and let the person that did the analyses solve the problem right away.)
- After the issue is fixed, the fix needs to be tested. The Current Assignee will send the issue to the Project Lead, who will assign a tester.
- The tester will send the issue back to the Project Lead when the test is finished (successfully or not).
- If the test was not successful, the issue will go back to the developer again; then to the tester again; until the test is successful.
- When the test is successful, the Project Lead will assign the issue to the Reporter.

If a (system or delivery) tester reports an issue, the Assignee changes as follows:
- Initially the Project Lead or Component Lead is assigned.
- The Project/Component/Team Lead will assign the issue to a Project Member (a developer).
- If the analyses is finished, the Current Assignee will assign the Project/Component/Team Lead again.
- If the issue needs to be fixed, the Project/Component Lead will assign the issue to a Project Member again, possibly the same person that did the analyses. (In a project, it may be the procedure to skip this and the previous step and let the person that did the analyses solve the problem right away.)
- After the issue is fixed and tested, the issue can go back to the Reporter (the tester). The Current Assignee can assign the issue directly to the Reporter.

If a developer reports an issue, the Assignee changes as follows:
- Initially the developer can assign the Project Lead, the Component Lead or himself.
- If the developer assigns himself, the issue will stay assigned to the developer, even after he closes the issue.
- If the Project/Component Lead was assigned, that person will assign a Project Member (a developer), in most cases someone other than the Reporter.
- After a fix is available, the Current Assignee will assign the Reporter to test the fix.
- If the fix does not pass the test, it will go back to the developer that made the fix. The fix will return to the reporter to test it again.
- When the fix passes the test, the fix is closed and the Project Lead is assigned.

The Current Assignee can perform the following tasks:

Task	When	Description
Edit Issues (4.1.11)	• if an estimate is to be given for the issue • If the issue security level must be changed	Change the issue fields that were originally entered when the issue was created.
Assign Issue (4.1.3)	• if a customer creates a new issue and it's assigned to the Project Lead • if the Current Assignee is stuck • if the issue needs to be tested by a tester • if the Current Assignee asked a question to the Reporter	Assign a Project Member or the Reporter to an issue.
Resolve Issue (4.7)	• if the Current Assignee is no longer working on an issue and a resolution is available • if the issue cannot be solved • if the reporter solved the issue locally	Resolve an issue.
Add Comments (4.2)	• if the Current Assignee has something to add to the description the reporter gave for the issue • if the Current Assignee needs to ask a question to the reporter • if the Current Assignee did an analyses of the issue and has found the cause	Add a comment on the issue.
Work on Issues (4.5.1)	• if the Current Assignee worked on the issue	Log work done.
Link Issues (4.10)	• if the issue turns out to be a duplicate of another issue • if the issue is related in some other way to another issue	Link this issue to another issue.
Create Attachments (4.1.1, 4.1.2)	• if the reporter send an attachment by email • if the Current Assignee was able to reproduce the issue and a screenshot will be helpful	Add an attachment to the issue.

5.6 Watcher

A Watcher is a special role. It is a non-participating Project Member role. A watcher can view the project and the issues on a project, but cannot comment on them or create new issues. In fact, the Watcher can see **all** issues, including those the Project Lead made visible only to himself by setting the security level of the issue to 'Project Management'.

The Watcher role is introduced for the quality assurance department of a project, but may be given to other users as well. Account Managers could be given this role so they can watch a project, without being actively involved.

A Watcher may be given the Monitor role to receive email on issue creation, closure and reopening. This will sent email for **all** issues.

The Watcher role could also be used as an additional role. A normal Project Member could be given the Watcher role in addition to another role. This enhances his security clearance, where issue security is concerned. The Project Member can then see **all** issues.

Warning: never give a customer the Watcher role. Use the Customer Read Only role instead.

5.7 Customer Read Only

Because a watcher has access to **all** issues, you should not give the customer the watcher role. Therefore a separate role is created for customers with read-only access to the project: the Customer Read Only role.

This role is identical to the watcher role, accept that the user can only view issues with issue security level 'Acceptation Testing' and 'End User Testing' (or 'None').

A Customer Read Only user may be given the Monitor role to receive email on issue creation, closure and reopening. Only email on issues viewable by the user will be sent.

5.8 Monitor

This is an additional role. That is, the person holding this role should also have an additional role in the project. The other role of a Monitor determines the issue security clearance of the user.

A Monitor is someone who is notified by email of issue creation and closure. This also includes the reopening of an issue. This way, a customer with the Acceptation Testing role and Monitor role is only informed about issues created with (or have been later modified to) a security level of 'Acceptation Testing', 'End User Testing' and 'None'.

A Watcher may be given the Monitor role to get email of all issue creation, closure and reopening.

In the previous setup of JIRA Project Leads were automatically notified of all issue creations (among other events). This is no longer the case. If a Project Lead wants to be informed of issue creation by email, he will have to grant himself the Monitor role. Only when the Project Lead is automatically assigned as the Current Assignee will an email be sent (because the Current Assignee is informed when an issue is created).

For a Monitor to stay informed on other events, for instance the addition of a comment, the Monitor can start watching an issue. See 4.1.5 'Watch It'.

5.9 Team Lead

This is an additional role. The other role determines the issue security clearance of the user.

A Project Lead can delegate some tasks to other users. The task of managing issues can be delegated to a Team Lead.

This role adds the following tasks to a Project Member, in addition to the tasks the other role grants:

Task	When	Description
Schedule Issue (4.3)	• if an issue should be resolved before a certain date and/or time • if an issue should be resolved in a certain version • if someone (else) should be assigned to the issue (see Assign Issue below) • if an estimate is to be given for the issue • If the issue security level must be changed	Enter a due date for an issue; enter a fix version for an unresolved issue; assign the issue to someone; change the original estimate; set the security level of an issue.
Assign Issue (4.1.3)	• if a customer creates a new issue and it's assigned to the Project Lead • if the Current Assignee is stuck • if the issue needs to be tested by a tester (see Schedule Issue above)	Assign a Project Member to an issue.
Close Issue (4.8)	• if an issue is resolved and the Reporter agrees with the resolution	Close the issue.
Modify Reporter (5.4.1)	• if the Team Lead enters an issue for someone else (a customer for instance)	Change the person who is registered to be the reporter of this issue.
Work on Issues (4.5.1)	• if the Team Lead helped to resolve the issue	Log work done.
Link Issues (4.10)	• if the issue turns out to be a duplicate of another issue • if the issue is related in some other way to another issue	Link this issue to another issue.
Manage Watcher List (4.1.5)	• if someone needs to be added or deleted from the watchers list and that person is unable to do this himself	Edit the list of watchers for an issue.
Set Issue Security (4.12)	• on issue creation the security level should be set to an appropriate level • if the issue needs to be hidden from certain people • if the issue needs to be visible for certain people	Hide the issue from certain people or make it available for them.

5.10 Project Administrator

This is an additional role. That is, the person holding this role should also have an additional role in the project.

A Project Lead can delegate the task of administering a project to another user by granting them the Project Administrator role.

This role adds the following task to a Project Member, in addition to the tasks the other role grants:

Task	When	Description
Administer Projects (8.2)	• when a new component is added to the project • when a new version is released • when users need to be given a role in the project	Change the projects description; add components and versions; view (project) members and change the project role membership.

5.11 JIRA Administrator

The JIRA Administrators are responsible for the creation of projects and users and the assignment of users to a group. They also have the ability to administer projects and issues for other people.

The following tasks can be performed by the administrator:

Task	When	Description
Administer Projects (8.2)	• a new project needs to be created • an existing projects settings need to be changed	Create a project or change the projects settings.
Create Issues (3.2)	• if the customer is not authorized to add issues and an issue is reported by the customer • if a task needs to be done	Create a new issue.
Move Issue (4.1.14)	• if the issue was created on the wrong project • if the issue was created under the wrong issue type	Move the issue to another project or change the issue type.
Assign Issue (4.1.3)	• if a customer creates a new issue and it's assigned to the Project Lead and the Project Lead is not available	Assign a Project Member to an issue.
Modify Reporter (5.4.1)	• if the Administrator enters an issue for someone else (a customer for instance) • if the reporter must be changed to transfer permissions to someone else	Change the person who is registered to be the reporter of this issue.
Delete Issues (4.1.12)	• if an issue must be deleted (and it can't be hidden)	Delete an issue permanently.
Manage Watcher List (4.1.5)	• if someone needs to be added or deleted from the watchers list and that person is unable to do this himself	Edit the list of watchers for an issue.
Set Issue Security (4.12)	• if the issue needs to be hidden from certain people • if the issue needs to be visible for certain people	Hide the issue from certain people or make it available to them.

5.12 Project Role Membership

Project role membership is controlled by the Project Lead and the Project Administrators. Assigning a user to a Project Role is enough to grant them access to the project (with the exception of the additional roles Project Administrator, Team Lead and Monitor) and all other permissions associated with the role **for that project**.

Users can have different permissions on different projects. Permissions associated with a role are only granted for the specified project not for other projects the user may have a role in.

To associate a user with a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the User column).
4. Type a username or click the user popup button to select users.
5. Multiple users can be added to a role at once. The usernames must be separated by a comma.
6. Press '***Add***'.

To remove a user from a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the User column).
4. Check the checkbox behind the user.
5. Multiple users can be removed at once. Check all the checkboxes of the users you want to remove.
6. Press '***Remove***'.

It's also possible to associate a group with a project role. This can be useful for general projects. For instance, the MD Sandbox and MD JIRA projects use groups.

To associate a group with a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the Group column).
4. Select a group in the left column (the 'Available Groups' column).
5. Multiple groups can be selected at once.
6. Press '***Join>>***'.

To remove a group from a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the Group column).
4. Select a group in the right column (the 'Groups in Project Role' column).
5. Multiple groups can be selected at once.
6. Press '***<<Leave***'.

You can associate and remove groups at the same time. Just select the groups in the two columns. Pressing either button will associate the groups selected in the 'Available Groups' column and remove the groups in the 'Groups in Project Role' column.

5.13 How To Use Project Roles

Project Roles can be used in different ways. Not all projects are the same. Some may even argue for the opposite. The project roles that we are using with JIRA should accommodate as many projects as possible. This chapter will explain how to use the project roles in a small, medium and large project. For the latter we have an extra variant where a subcontractor is involved.

5.13.1 In a Small Project

In a small project only a few roles will be used. Developers will obviously be given the role of Sogeti Developer. Testers will be given the role of Delivery Tester. And customers are given the role of Acceptation Tester.

It will probably be useful to give all developers and testers the ability to schedule issues by giving them the Team Lead role (besides their other role). Likewise it will be useful to give all developers the ability to administer the project by giving them the Project Administrator role.

In this setup developers can add versions and components as needed and when needed. Everybody can assign issues and schedule them. In a small team it's not very useful to restrict the functionality very much, because otherwise the absence of people has an immediately effect on the flexibility of the team. By not restricting anyone, the team remains flexible.

5.13.2 In a Medium Sized Project

In a medium sized project, we still want to allow the Project Members as much functionality as possible. So developers will again have the Sogeti Developer role; testers have the Delivery Tester role. Customer will have the Acceptation Tester role.

In medium sized project you often see a separate testing role for the functional designers, however. So it is probably useful to give them the System Testing role (instead of the Sogeti Developer role).

Developers should be able to create new versions and components, so they should have the Project Administrator role. Functional designers often have an additional role as replacements for the Project Lead, so they will probably have this role as well.

Team Leads can be either everyone (accept the customer) or certain members of each group (developers, testers and functional designers).

Advantage of the setup where functional designers do the System Testing (or at least have that role) is that they can have their own issues (with security level 'System Testing Internal').

5.13.3 In a Large Project

In a large project it makes more sense to make the roles of the Project Members more explicit. Developers have the Sogeti Developer role, testers have the Delivery Tester role, functional designers have the System Tester role. Customers have the Acceptation Tester role and the end users have the End User Tester role.

A number of selected Project Members are given the Project Administrator role. Team leads are given the Team Lead role.

In this setup the team leads are responsible for assigning work to their teams. The Project Administrators act as backups for the Project Lead. They schedule releases and in conjunction with the customer determine which issues need to be solved in which release. So the Project Administrators will also need the Team Lead role.

In a large project some thought needs to be given to procedures. Who is responsible for what. The Project Role of the Project Members needs to reflect these procedures.

5.13.4 In a Subcontractor Project

Sometimes a project has one or more subcontractors, that do part of the work for Sogeti. They are responsible for their own deliverables. We take it for granted that they (system) test these themselves.

So the developers that develop the Sogeti deliverables are made Sogeti Developers. The subcontractor developers are given the Subcontractor role. Any subcontractor testers are also given the Subcontractor role. From the standpoint of Sogeti, they form one team.

Testers that test the Sogeti deliverables are given the System Tester role. The testers that test the entire delivery are given the Delivery Tester role. If these two teams are really one and the same, then the testers are all given the Delivery Tester role; *they will have to make sure that issues that are found in the system test they perform on the Sogeti deliverables are given the right security level (System Testing)*. Otherwise, these issues are visible for the subcontractors as well.

Working with a subcontractor takes some extra effort, particularly on the part of analysing an issue. At first, it may well be unclear if an issue that is found in the delivery test is the responsibility of Sogeti or the subcontractor. It may be necessary to redo a test in the system test environment to determine this. Functional designers may be involved, as well as the system integrator (a role that is performed by a Sogeti Developer).

Only when the cause of the issue is determined can it be assigned to the right person so it can be solved.

5.14 Dummy Users

To help with the assigning of issues in a large project, a number of dummy users were created. These dummy users can be given a role in a project, so they can be used to assign issues to. The issues assigned to these dummy users, are in essence 'unassigned'. These issues must be scheduled and assigned to Project Members that can perform the next step in the workflow of the issue.

The dummy users are:

Username	Full Name	Description
developer	Unspecified Developer	Issues assigned to this user are unresolved; they need to be assigned to a developer for solving.
subcontractor	Unspecified Subcontractor	Issues assigned to this user are unresolved; they need to be assigned to a subcontractor for solving.
system-tester	Unspecified System Tester	Issues assigned to this user are resolved and need to be retested by a system tester.
delivery-tester	Unspecified Delivery Tester	Issues assigned to this user are resolved and need to

		be retested by a delivery tester.
acceptation-tester	Unspecified Acceptation Tester	Issues assigned to this user are resolved and need to be retested by an acceptation tester.
end-user-tester	Unspecified End User Tester	Issues assigned to this user are resolved and need to be retested by an end user tester.

A number of filters are associated with these dummy users to find the issues assigned to them. These filters are named after the dummy users themselves. So the 'Unspecified Developer Issues' is a filter that displays issues assigned to the 'Unspecified Developer' dummy user. The 'Unspecified User Issues' is a filter that displays issues assigned to any dummy user.

If you have access to more than one project where these dummy users are used, then the filters return the issues in all these projects. To narrow the result of a filter, you can do the following:

1. Click the filter to display the issues.
2. Click 'Edit'.
3. Select the project that you want the search to be narrowed to. Optionally, you may also specify other search criteria.
4. Press '***View>>***'.

6 USER SETTINGS

JIRA allows each user to tweak the user interface to their own liking. For a new user, the defaults are used until the user makes a change. This chapter explains how to tweak the interface.

6.1 User Profile

In the user profile screen you have access to all user specific settings in JIRA. You can open the user profile screen by clicking 'Profile' in the upper right corner of every JIRA screen (above 'Quick Search').

In the user profile screen the following options are available:

Option	Explained in	Description
Reports		
Personal Roadmap	6.2.1	Per project, the upcoming releases are shown, including the unresolved issues that have been assigned to you.
Your Votes	6.2.2	The list of (unresolved) issues that you have voted for.
Your Watches	6.2.3	The list of (unresolved) issues that your watching.
Operations		
Administer User	6.1.1	Administer the user.
Change Password	6.1.2	Change your JIRA password.
Dashboard Config	6.5	Change the appearance of the home page.
Manage Filters	6.4	Manage your saved filters.
Navigator Columns	6.3	Change which issue fields are shown in which order, when searching for issues.
View Preferences	6.6	View your current preferences.
Edit Preferences	6.6	Change your preferences.
View Your Profile	6.1.3	View your current profile (view profile screen).
Edit Profile	6.1.3	Change your profile (username and email address).

6.1.1 Administer User

This task can only be performed by Administrators. See 7.2 'Administer User' for a detailed description of this task.

6.1.2 Change Password

Changing passwords is only useful for non-Sogeti users. Sogeti users use their network username and password. JIRA is configured to keep your JIRA password synchronized with your network password.

For Customers however it is useful to change their password regularly for security reasons. JIRA does not force you to change the password however.

To change your password, do:

1. In the view profile screen, click 'Change Password'.
2. In the 'Current Password' edit box, type your current password.
3. In the 'New Password' edit box, type your new password.
4. In the 'Confirm Password' edit box, type your new password again.
5. Press '***Update***'.

6.1.3 Profile

Your profile consist of the following information:
- Username – the JIRA username with which you logged in.
- Full name – your full name with which your are known in JIRA.
- Email address – the email address on which you receive email notifications.
- Groups – the JIRA groups you are a member of.

All this information is available in the view profile screen. It is shown in the left part of the screen, under 'Your profile'.

You can edit some information in your profile. To do so, do:
1. In the view profile screen, click 'Edit Profile'.
2. Change your full name in the 'Fullname' edit box.
3. Change your email address in the 'Email' edit box.
4. Press '***Update***' to store your changes.

6.2 Reports

From the User Profile you can request three reports, namely:
1. Personal Roadmap
2. Your Votes
3. Your Watches

These reports are discussed in the paragraphs below.

6.2.1 Personal Roadmap

The personal roadmap gives information about the upcoming releases and the outstanding issues on those releases that are **assigned to you**. The issues listed are the issue that are linked to the release through the fix version/s field.

To view the Personal Roadmap, do:
1. In the view profile screen, click 'Personal Roadmap'.
2. Click the project for which you want to view your personal roadmap.

Alternatively, you can:
1. In the browse project screen of the project for which you want to view you personal roadmap, click the 'Road Map' tab.
2. In the global roadmap, click 'View personal roadmap'.

6.2.2 Your Votes

This report shows the list of issues for which you have voted. The list is shown using the layout for the navigator columns (see 6.3).

To view your votes, do:
1. In the view profile screen, click 'Your Votes'.

6.2.3 Your Watches

This report shows the list of issues that you are currently watching. The list is shown using the layout for the navigator columns (see 6.3).

To view your watches, do:
1. In the view profile screen, click 'Your Watches'.

6.3 Navigator Columns

The navigator columns determine how lists of issues are displayed. This screen allows you to add new issue fields, delete selected issue fields or change the order of issue fields.

To view the navigator columns screen, click 'Navigator Columns' in the view profile screen.

To add a column to the list, do:
1. In the navigator columns screen, select the column you wish to add from the 'Add New Column' select box.
2. Press '***Add***' to add the column.

To delete a column, click the waste basket icon. To change the order of the fields, click the right arrow or left arrow icon of the column you wish to move.

To undo your changes and return to the default settings, click 'Restore Defaults'.

The following columns are special:

Column Name	Description
Operations	Adds operations you can perform on an issue. It allows you to directly invoke these operations, without first opening the issue.
Last Comment	If the last comment on the issue was more than 7 days ago and the issue was not resolved, adding this column to the issue navigator will colour the row with the issue red.

6.4 Filters

Filters are useful to select issues with certain criteria. A filter is actually a search that was saved for later use. There are two categories of filters: your filters and viewable filters. Viewable filters are filters that have been shared by others. You can't edit these filters (only the author can). You can of course view a filter and then save it as one of yours.

6.4.1 Create a Filter

To create a filter, do:
1. In the view profile screen, click 'Manage Filters'.
2. You are now in the manage filters screen.
3. Click the 'New' tab or click the 'Create new' search (if available).
4. Set the search criteria for the new filter. See '6.7 A Note on Search Syntax' for more details about this.
5. Press '***View >>***'.

6. Change the search criteria and press '***View >>***' again until the search finds the issues you want to filter.
7. Click 'Save' it as a filter.
8. Enter a name in the 'Name' edit box en type a description in the 'Description' text area.
9. Press '***Save***' to create the filter.

You can now rename the filter, save it as a new filter, subscribe to the filter or share the filter.

6.4.2 Rename a Filter

To rename a filter, do:
1. In the view profile screen, click 'Manage Filters'.
2. You are now in the manage filters screen.
3. Select the filter you want to rename by clicking on it's name.
4. Click 'Rename' current filter.
5. Change the 'Name' or 'Description' of the filter.
6. Press '***Rename***'.

6.4.3 Subscribe to a Filter

It is possible to subscribe to a filter if it is visible to you. Subscribing to a filter means, that you receive an email on a regular basis (you specify how often) with a list of issues that conform to the search criteria of the filter.

For instance, the 'Last 24 hours' filter filters issues that have been created or updated in the last 24 hours. By subscribing to this filter, you can receive a daily email with a list of these issues.

To subscribe to a filter, do:
1. In the view profile screen, click 'Manage Filters'.
2. You are now in the manage filters screen.
3. Click the 'Subscribe' link of the filter you want to subscribe to (in the fourth column).
4. Select Personal Subscription in the 'Recipients' select box. Or select a group to subscribe everybody in the group (only available for some users).
5. Set the 'Period' in the text box. The format is the same as that of the work log. So 4w is once every 4 weeks; 1d is once every day.
6. Select the 'Email zero results' checkbox if you want to receive an email even when there are no issues selected by the filter.
7. Press '***Subscribe***' to finish the subscription.

6.4.4 Share a Filter

You can share a filter with other people. If you share a filter, they can use it too. This is not the same as sharing the results of a filter. Issues that can't be viewed by a user

won't show up in a shared filter if that user executes it, even if the issue shows up in your search results.

You can only share filters that you have created yourself. You can share a filter with either a group of people or with everybody.

To share a filter, do:
1. In the view profile screen, click 'Manage Filters'.
2. You are now in the manage filters screen.
3. Click the 'Share' link in the operations column of the filter you want to share.
4. Select the 'Share with all' radio button to share the filter with everybody. Select the 'Share with a group' radio button and select a group in the select box below to share the filter with the selected group. You can only share a filter with one group.
5. Press '***Share***' to share the filter.

To stop sharing a filter, do:
1. In the view profile screen, click 'Manage Filters'.
2. You are now in the manage filters screen.
3. Click the 'Share' link in the operations column of the filter you want to share.
4. Select the 'Not Shared' radio button.
5. Press '***Share***' to stop sharing the filter.

Note that you need extra permissions to share filters. To prevent an explosion of shared filters, this permission is only granted to certain users.

6.4.5 Delete a Filter

To delete a filter, do:
1. In the view profile screen, click 'Manage Filters'.
2. You are now in the manage filters screen.
3. Click the 'Delete' link in the operations column of the filter you want to share.
4. Press '***Delete***' to delete the filter.

6.5 Manage the Portal (Dashboard Configuration)

The Portal or Dashboard is your own personal home page in JIRA. Initially everybody uses the default JIRA dashboard. To add a personal touch and to put information that is tailored to your needs at your finger tips, you can create your own dashboard.

To create you own dashboard, do:
1. From the '**Home**' page, click 'Manage Dashboards'. Alternatively, in the view profile screen, click 'Tools->Manage Dashboards'.
2. Press '***Create new dashboard***' to start configuring your own dashboard.
3. You are now in the creat dashboard screen.

The dashboard consists of zero or more gadgets. Gadgets appear as portlets on the dashboard page.

6.6 Preferences

There a number of preferences you can set to tweak your JIRA experience to your linking. These are:

- Number of Issues displayed per page (default: 20),
- Type of Mail Message sent to you from JIRA (default: Text),
- Locale (default: None, which translates to US English) and
- Email me when I make changes (default: off).

The number of issues displayed per page refers to the page used to display a list of issues, for instance in '**Find Issues**'. If there are more issues in the query, you can browse to the next 20 hits with the 'Next >>' link above and below the list. You can increase the setting to display more items (if you don't mind scrolling) or decrease it to display less items (for smaller screens).

The type of mail message send to you when you are notified (for instance about being assigned an issue) can be set to 'Text' or 'HTML'. Set this preference to 'HTML' to receive email in HTML format.

The locale refers to the language used to display labels in JIRA. A number of different languages are pre-installed. However, because all issues are to be in English, it makes sense to set the locale to English as well.

"Email me when I make changes" refers to the execution of issue operations. For instance, if you assign an issue to yourself this setting controls if you receive an email notification of this.

You can view your current preferences by clicking 'View Preferences' from the view profile screen.

To edit the preferences, do:

1. In the view profile screen, click 'Edit Preferences'.
2. Type an integer number in the 'Number of Issues displayed per page' edit box.
3. Select the type of email (Text or HTML) you want to be notified with in the 'Type of Mail Message sent to you from JIRA' select box.
4. Select the locale you want JIRA to display labels with in the 'Locale' select box, or leave it set to 'None' to use the default (US English), which is preferable.
5. Check the 'Email me when I make changes' checkbox to get notified when you make changes.
6. Press '***Update***' to save the changes to your preferences.

6.7 A Note on Search Syntax

JIRA uses Lucene for text indexing. It has a special syntax for query parsing, that you can use to tweak your filters and searches.

6.7.1 Query Terms

A query is broken up into terms. A single term is a single word, such as "hello". A phrase is a group of words surrounded by double quotes, such as "hello world". Query terms are case insensitive. They can be combined to form more complex queries (as explained later in this chapter).

6.7.2 Term Modifiers

In many cases a single term or phrase is enough to find the issues you want. However, sometimes you would like to use wildcards.

JIRA supports the following **wildcards**:
- ? (question mark) – matches a single character
- * (asterisk) – matches zero or more characters

Note: you cannot use the question mark or the asterisk as the first character in a search.

You can give a term more relevance by adding a **boost factor** to a term. To add a boost factor, use a caret symbol (^) and a number at the end of the single term or phrase. Like so: hello^4 world, will search for the words hello and world, but gives hello 4 times more relevance than world.

You can create a **fuzzy search** by adding a tilde symbol (~) to a single term. Like so: hell~, will find words like hell, help, well and hello.

A **proximity search** can be done by adding a tilde symbol (~) and an integer number to a phrase. Like so: "hello world"~4, will find issues with hello and world within 4 words of each other.

6.7.3 Combining Terms

Boolean operators allow terms to be combined through logic operators. The following operators are supported:
- **OR**, || – logical or; combines two terms where only one of the two is required. This is the default when searching with more than one term.
  Example: hello world, will find issues with either hello or world.
- **AND** – logical and; combines two terms where both are required.
  Example: hello AND world, will find issues that have both hello and world.
- **NOT**, ! – logical not; combines two terms where the second term should not appear in the results. You cannot use not with only one term.
  Example: hello ! world, will find issues with hello that do not have world.
- **+** – a required term; to search for issues that must contain the specified term.
  Example: +hello world, will find issues with hello and may have world.
- **-** – an excluded term; to search for issues that may not contain the specified term. The difference with the NOT operator is that the exclusion cannot be used with grouping and NOT can.

6.7.4 Grouping Terms

You can group terms using parentheses to form sub queries. Using the Boolean operators you can combine sub queries to form highly complex queries. Like so: hello AND (world OR planet), will find issues with hello and either world or planet.

6.7.5 Special Characters

The current list of special characters is: + - && || ! ( ) { } [ ] ^ " ~ * ? : \

To search for these characters, you need to escape them with a back slash character (\). Like so: \(1\+1\), will search for (1+1).

7 CREATING A NEW USER

Only administrators can create new users. Creating a new user involves two steps, creating the user in JIRA and adding the user to certain groups.

7.1 Create a User

To create a user, do:

1. Click the '**Administration**' link in the main menu.
2. Click the 'User Browser' link in the '*Users & Groups*' menu.
3. Click 'Add User'.
4. Alternatively you can click 'create a new user' from the Administration portlet from the dashboard.
5. Type the username (usually the network username of the employee) in the 'Username' text box.
6. If the user is indeed an employee of Sogeti, leave the 'Password' and 'Confirm' text boxes empty. The network username will be used instead.
   If the user is not an employee of Sogeti, type the agreed upon password in the 'Password' text box and then type it again in the 'Confirm' text box (to prevent typos).
7. Type the full name of the user in the 'Full Name' text box. Type the email address in the 'Email' text box.
8. Uncheck the 'Send Password Email' checkbox if the user is an employee of Sogeti.
9. Press '***Create***' to create the new user.
10. Click 'Edit Groups' to edit the team membership of the new user. Add the groups to which the user should be added (see 7.3 'Group Membership' for more information).

7.2 Administer User

To administer a user, do:

1. Click the '**Administration**' link in the main menu.
2. Click the 'User Browser' link in the '*Users & Groups*' menu.
3. Alternatively you can click 'users' from the Administration portlet from the dashboard.
4. Find the user you want to administer, either by browsing through the list or by using the filter to narrow the list of users.
5. Click the 'Groups' link in the operations column to edit the team membership of the user. See '7.3 Group Membership' for more information.
   Click the 'Edit' link in the operations column to edit the full name and email address of the user. Press '***Update***' to save the changes.
   Click the 'Delete' link in the operations column to remove the user from JIRA. Press '***Delete***' to delete the user.

To change a users password, do:

1. Click the '**Administration**' link in the main menu.
2. Click the 'User Browser' link in the '*Users & Groups*' menu.
3. Alternatively you can click 'users' from the Administration portlet from the dashboard.
4. Find the user you want to administer, either by browsing through the list or by using the filter to narrow the list of users.
5. Click the username or email address.
6. Click 'Set Password'.
7. Type the password in the 'Password' text box.
8. Type the password again in the 'Confirm' text box to prevent typos.
9. Press '***Update***' to change the password.

7.3 Group Membership

Group membership controls what a user can do in JIRA. All users are member of the jira-users group. Depending on the type of user, group membership should be as follows:

Type of user	Group membership
MD Process Manager	• jira-users • jira-administrators • md • md-<dc-name> • md-<dc-name>-ta • md-admin
MD Architect	• jira-users • md • md-<dc-name> • md-<dc-name>-ta • <division abbreviation*>
MD Developer	• jira-users • md • md-<dc-name> • <division abbreviation*>
Non-MD developer or tester	• jira-users • <division abbreviation*>
Subcontractor	• jira-users • sogeti-extern
Customer	• jira-users • sogeti-extern

* The division abbreviation is the abbreviation of the division the user is working for. Domain: 'a&bs', 'dse', 'ese', 'is', 'md', 'sct'.

With the introduction of Project Roles, it is no longer necessary to add a user to project specific groups. A user can just be added to Project Roles by the Project Lead of the project.

7.3.1 Project Lead

Project Lead is not controlled through group membership, but is a project specific setting. The Project Lead is the (technical) project leader of a project. When creating

an issue the Project Lead is the default assignee if the issue is not created on a component or the component doesn't have the component lead assigned as default assignee.

The Project Lead has additional permissions to a Project Member. See 7.3.3 for more details.

To make a user Project Lead, do:

1. Click '**Browse Project**'.
2. Make sure you are browsing the project you want the user to become Project Lead of. If not, click 'Projects' next to the name of the project you are browsing. Then select the right project from the list.
3. Click the 'Administer Project' link below the project description.
4. Click 'Edit Project'.
5. Select the user in the 'User Picker' popup or type the username in the text box.
6. Click '***Update***' to make the user the Project Lead of the project.

Note that this functionality is also available to users with Project Administrators. **Most notably the Project Lead has this permission.** This means that a Project Lead can make another user Project Lead of the project.

If the Project Lead does this, he will no longer be Project Lead and so won't have the Administer Project permission anymore. So he will get an ***error page*** if he does this, because he can't return to the administer project screen.

To make sure the Project Lead has the same permissions as before the Project Lead change, the Project Lead should first be added to a number of other roles. These are:

Project Role	Why you need this role
Project Administrator	Needed so the Project Lead can still administer the project; notably to make himself the Project Lead again.
Team Lead	Needed to manage issues.
Sogeti Developer	Needed to be assignable to issues and to be able to create issues, etc.. This role can be substituted by the System Tester, Subcontractor, Delivery Tester and even the Acceptation Tester role, but not the End User tester role.
Watcher	Needed to be able to view **all** issues.

Users that have all these roles, have almost the same permissions as the Project Lead. You cannot have the Delete Issue permission, however, unless you are the Project Lead.

7.3.2 Component Lead

Like the Project Lead a Component Lead is not controlled through group membership, but a project specific setting. The Component Lead is the Lead of a Component in a project. A Component Lead can be the default assignee of issues on that Component, if so specified.

To make a user Component Lead of a Component of a project, do:

1. Click '**Browse Project**'.
2. Make sure you are browsing the project you want the user to become Project Lead of. If not, click 'Projects' next to the name of the project you are browsing. Then select the right project from the list.

3. Click the 'Administer Project' link below the project description.
4. Click the 'Edit' link beside the component or create a new component by clicking 'Add' new component.
5. Select the user in the 'Component Lead' popup or type the username in the text box.
6. If you're creating a new component, type the component name in the 'Name' text box; type a description in the 'Description' text box. Press '***Create***' to create the component.
   If you're updating an existing component, press '***Update***'.

The default assignee for a new component is the **Project Lead**. So to make the Component Lead the default assignee for the component, do:

1. In the administer project screen, click 'Select' assignees for components.
2. Check the radio button for the Component Lead in the right most column.
3. Press '***Update***'.

7.3.3 Project Member

Project Membership is controlled through the Project Role membership. See 5.12.

7.3.4 Administrator

An Administrator has different permissions. Because of these different permissions some JIRA features are only available to Administrators.

First and foremost is the global permission of Administrators to administer JIRA. Administering JIRA can be divided into two categories:

1. daily tasks like creating new users, creating new groups, creating new projects and adding users to projects and
2. changing the behaviour of JIRA.

Tasks in the first category are described in this document under this and the following chapters. They can be done safely and without effecting ALL users.

Tasks in the second category do effect all users. They should only be done by experienced persons. The tasks in this category are:

- Changing global settings
- Changing workflows and workflow schemes
- Changing field configurations, field configuration schemes, screens, screen schemes and issue type screen schemes
- Changing issue types, priorities, resolutions and statuses
- Importing and exporting data
- Changing system settings

7.3.5 Creating a Group

In some cases it is useful to use groups. There are some standard groups that you need to associate with a user as explained previously in this chapter.

To create a group, do:

1. Click '**Administration**' from the main menu.
2. Then click 'Group Browser' in the Users & Groups submenu.
3. Alternatively click 'groups' in the Administration portlet on the home page.
4. You are now in the group browser screen.
5. Type a name in the 'Name' text box.
6. Press '***Add Group***' to create the (empty) group.

7.3.6 Adding an Existing User to a Group

To add existing users to the project group, do:

1. Click '**Administration**' from the main menu.
2. Click 'User Browser' in the Users & Groups submenu.
3. Alternatively click 'users' in the Administration portlet on the home page.
4. You are now in the user browser screen.
5. Select the user by browsing through the various screens. Use filtering to limit the users that you see.
6. Click 'Groups' in the operations column of the user you want to add to the group.
7. Select the group in the 'Available Groups' multi select box.
8. Press '***Join>>***' to add the groups to the user's groups.
9. Select a group in the 'Groups' multi select box and press '***<<Leave***' to remove a user from a group.

Alternatively, you can use the Bulk Edit Group Members screen. Do:

1. Click '**Administration**' from the main menu.
2. Then click 'Group Browser' in the Users & Groups submenu.
3. Alternatively click 'groups' in the Administration portlet on the home page.
4. You are now in the group browser screen.
5. Click 'Bulk Edit Group Members'.
6. Select one or more groups in the 'Selected # of ### Groups' select box.
7. In the blue box that appears below the select box, click 'Click here' to refresh the 'Group Members' column.
8. Alternatively, you can click the 'Edit Members' link in the operations column of the group you want to edit. This will display the group in the 'Group Members' column in one go.
9. Type usernames in the 'Add members in the selected group(s)' column, separated by commas. You can also use the User Picker popup by clicking the icon besides the edit box.
10. Select one or more groups in the 'Group Member(s)' column. Users will be added to all selected groups.
11. Press '***<<Join***'.
12. Select users in the 'Group Member(s)' multi select box and press '***Leave>>***' to remove user(s) from group(s).

7.3.7 Adding a New User

To add a new user to the project group, do:

1. Click '**Administration**' from the main menu.
2. Click 'User Browser' in the Users & Groups submenu.
3. Click 'Add User'.
4. Alternatively click 'create a new user' in the Administration portlet on the home page.
5. Type the username in the 'Username' edit box.
6. If the user has a Sogeti user account, leave the 'Password' and 'Confirm' edit boxes empty. Otherwise type a password in the 'Password' edit box and confirm it in the 'Confirm' edit box.
7. Type the full name in the 'Full Name' edit box.
8. Type the user's email in the 'Email' edit box.
9. If the user has a Sogeti user account, make sure that you have **unchecked** the 'Send Password Email' checkbox. Otherwise leave it checked.
10. Press '***Create***' to create the user.
11. Click 'Edit Groups'.
12. Select the group in the 'Available Groups' multi select box.
13. Press '***Join>>***' to add the groups to the user's groups.

8 ADMINISTERING A PROJECT

There are two roles that can administer a project, the Administrator (full functionality) and the Project Lead (limited functionality). Only an administrator can create a new project and change all settings. A Project Lead can only change some settings of an existing project (the project(s) for which he/she is Project Lead).

8.1 Creating a New Project

Creating a new project is now an easy task. It is divided into these parts:

1. Creating the actual project
2. Creating a version control coupling (optional) and adding it to the project.

After the project is created, the components and versions should be added to the project and the Project Members should be associated with a Project Role by administering the project (by the Project Lead). The Project Lead can delegate these tasks to a Project Member, if he first associates the Project Member with both a normal role and the Project Administrator role.

With the introduction of Project Roles it is no longer necessary to create Project Groups; nor is it necessary to create a permission scheme.

The steps for creating a new project are described in their separate paragraphs.

8.1.1 Creating the Project

You are now ready to create the actual project. Do:

1. Click '**Administration**' from the main menu.
2. Click 'Projects' from the 'Project' submenu.
3. Click 'Add Project'.
4. Alternatively click Projects: 'create new' in the Administration portlet on the home page.
5. Type a name in the 'Name' edit box, using the naming convention '<Customer> <Project>'.
6. Type a Project Key in the 'Key' edit box, using the naming convention '<Division code>/<Customer code>/<Project code>'. **Warning: after creating the project, the key cannot be changed!** So make sure it is correct.
7. Type an (optional) URL to the Wiki page of the project.
8. Select the Project Lead. This is the (technical) project leader of the project.
9. Type a description in the 'Description' text area. You can use HTML mark-up. For instance (remove the lines that are not applicable):
   <h1>MD Project for [customer]: [project name]</h1>

This is an MD project for [customer]: [project description].

Project Lead: [project leader]

Project Manager: [project manager]

Account Manager: [account manager]

Service Manager: [service manager]

Functional Design: [functional designer]

Software Architect: [software architect]

Lead Developer: [lead developer]

Test Manager: [test manager]

Test Coordinator: [test coordinator]

10. Select the 'MD Project Roles' notification scheme in the 'Notification Scheme' select box.
11. Select the 'MD Project Roles' permission scheme in the 'Permission Scheme' select box.
12. Select the 'MD Project Roles' security scheme in the 'Issue Security Scheme' select box.
13. Press '***Create***' to create the new project.
14. Click Issue Type Screen Scheme: 'Select'.
15. Select the 'MD Project Roles' issue type screen scheme in the 'Scheme' select box.
16. Press '***Associate***' to set the issue type screen scheme.
17. Click Workflow Scheme: 'Select'.
18. Select the 'md-project-roles' workflow scheme in the 'Scheme' select box.
19. Press '***Associate***'.
20. Read the notice. Since this is a new project, there are no issues, so we can proceed without problems.
21. Press '***Associate***' again to associate the workflow with the project.
22. Click Project Category: 'Select Category'.
23. Select the appropriate project category in the 'Project Category' select box.
24. Press '***Select***' to set the category.

The components and versions of the project can now be added by the Project Lead. Since the administrators do not have detailed knowledge of the project, they cannot do this.

8.1.2 Creating a Version Control Coupling

It is possible to couple Version Control with JIRA. Currently this has only been enabled for CVS. *Because a coupling can generate large files on the JIRA server, this feature should be used with great care, and only if the customer demands it.*

To create a coupling with CVS, do:

1. Click '**Administration**' from the main menu.
2. Click 'CVS Modules' in the 'Global Settings' submenu.
3. Click 'Add' new cvs module.
4. Type a name in the 'Name' edit box, using the naming convention: 'MD <Customer> <Project> - <module>'.
5. Type a description in the 'Description' edit box, using the convention: '<cvs-project>::<module>'.

6. The 'CVS Root' should be ':ext:md-jira@cvs.sogeti.nl:/cvs/<cvs-project>'.
7. The 'Module Name' is <module>.
8. Make sure that 'Automatically retrieve the CVS log' is checked.
9. The 'Log File Path' must be '/opt/data/cvs-log/md-<customer code>-<project code>-<module>.log'.
10. Type the password in the 'Password' edit box.
11. Press '***Add***' to add the CVS module.

To activate the module to the project, do:
1. From the home page, click the project from the 'All projects' portlet.
2. Click 'Administer Project'.
3. Click CVS Modules: 'select modules'.
4. Select the module.
5. Press '***Select***'.

Note: in the CVS commit comments the issue ids must be mentioned to enable JIRA to match the CVS commit with a certain issue. This is a good idea even if there is no CVS Module configured for the project!

8.2 Administering an Existing Project

Project Leads, users with the Project Administrator role and Administrators can administer an existing project. Administrators can change all project settings of all projects, while Project Leads and users with the Project Administrator role can only change a few settings of the projects for which they have this role.

8.2.1 Project Administration

The following project settings can be changed by the Project Lead and users with the Project Administrator role:

Setting	Description	Restriction
Project Name	The name of the project.	Do not change!
Project URL	URL of the Project's Wiki page.	Must be a valid (complete) URL.
Project Lead	The Project Lead of the project. This should be the project leader.	None. But remember that if the Project Lead changes, the previous Project Lead may no longer play a role in the project!
Project Description	The description of the project that people see when browsing the project.	None. You can use HTML mark up. Make sure you use proper tags (close tags that need closing).
Manage Components	Add, edit and/or delete components. Set the default assignee for components.	Component Leads must be Project Members.
Manage Versions	Add, edit, merge, release, archive and/or delete versions.	None.
Project Role Membership	Change the roles of Project Members; add or remove Project Members.	Mind the additional roles. You must not add a Project Member only to an additional role.

To edit the project's name, URL, Description and/or Project Lead, do:
1. Click '**Administration**' from the main menu.
2. Find the project you want to edit, then click 'Edit' in the operations column.

3. Change the URL, Project Lead and/or Description.
4. Press '***Update***' to save the changes.

To add a component, do:
1. Click '**Administration**' from the main menu.
2. Find the project you want to edit, then click 'View' in the operations column.
3. You are now in the administer project screen.
4. Click 'Add' new component.
5. Type a name in the 'Name' edit box. Type a description in the 'Description' edit box. Select a Component Lead for the new component.
6. Press '***Create***' to create the new component.

Note: from the administer project screen you can edit the project by clicking 'Edit Project'.

The administer project screen can also be reached by surfing to the project via the home page's 'All projects' portlet and then clicking 'Administer Project'.

To edit a component, do:
1. From the administer project screen, click 'Edit' behind the component name.
2. Change the name in the 'Name' edit box. Change the description in the 'Description' edit box. Select a new Component Lead.
3. Press '***Update***' to save the changes.

To delete a component, do:
1. From the administer project screen, click 'Delete' behind the component name.
2. Press '***Delete***' to remove the component.

Note: deleting a component will result in an update of issues on the component.

To manage versions, do:
1. From the administer project screen, click 'Manage' versions.
2. You are now in the manage versions screen.
3. You can add a version by filling out the 'Add Version' box and pressing '***Add***'.
4. You can edit the version's details by clicking 'Edit Details', change the details (version number, description and release date) and then press '***Update***'.
5. To merge the issues from one or more versions into another, click 'Merge', then select the versions to merge and the version to merge them into and press '***Merge***'.
6. To release a version, click 'Release'. To undo releasing a version click 'Unrelease'.
7. To archive a version, click 'Archive'. To undo archiving a version click 'Unarchive'.

8. To delete a version, click 'Delete', check the radio button on the desired setting (swap current issues to (raised-in) version (and select the version), remove version from all issues), then press '***Delete***'.
9. To change the order of releases, use the arrows. Note: this does not change the release date. To change the release date, edit the version's details.

To edit the project role membership, see 5.12 'Project Role Membership'.

8.2.2 Administrator's Administer Project

An Administrator can do basically the same things as a user with Administer Project permission, save that the administrator can change all settings from the administer project screen.

To go to the administer project screen, do:
1. From the home page, click the project you want to administer in the 'All projects' portlet.
2. Alternatively click '**Browse Project**' from the main menu, then click 'Projects' and find the project. Click on it.
3. Now click 'Administer Project'.
4. Alternatively click '**Administration**' from the main menu, then find and click the project you want to administer.
5. You are now in the administer project screen.

You can select different schemes from here. Or edit the project, manage the components or versions (see 8.2.1).

8.3 Permission Schemes

With the introduction of project roles, we will be using one permission scheme, 'MD Project Roles', for all projects. There should be no need to create new permission schemes for other projects.

However, we cannot foresee all uses in advance. So, to create a permission scheme for a project, do:
1. Click '**Administration**' from the main menu.
2. Click 'Permission Schemes' from the 'Schemes' submenu.
3. You are now in the view permission schemes screen.
4. Lookup the 'MD Project Roles' permission scheme. Click the 'Copy' operation behind the scheme.
5. Lookup the 'Copy of MD Project Roles' and click 'Edit'.
6. Change the name of the permission scheme in the 'Name' edit box.
7. Change the description of the scheme.
8. Press '***Update***' to save the changes.
9. Lookup the permission scheme again (under the new name). Click 'Permissions'.
10. Edit the permission scheme.

You must now associate the permission scheme with a project. To do this, do:

1. From the home page, click the project you want to administer in the 'All projects' portlet.
2. Alternatively click '**Browse Project**' from the main menu, then click 'Projects' and find the project. Click on it.
3. Now click 'Administer Project'.
4. Alternatively click '**Administration**' from the main menu, then find and click the project you want to administer.
5. You are now in the administer project screen.
6. Click Permission Scheme: 'Select'.
7. Select the permission scheme in the 'Scheme' select box.
8. Press '***Associate***'.

9 NOTIFICATIONS

Notifications in JIRA are email notifications. Email notifications are send when a certain event is triggered. The triggering of events is done through the workflow step operations.

9.1 Notification Events

JIRA recognizes the following events.

Event	Triggered when
Issue Created	An issue is created.
Issue Updated	An issue is changed by using the 'Edit' operation on it.
Issue Assigned	An issue is assigned to a different user.
Issue Resolved	An issue's status changes to resolved.
Issue Closed	An issue's status changes to closed.
Issue Commented	A comment is added to an issue.
Issue Reopened	An issue is reopened.
Issue Deleted	An issue is permanently deleted.
Issue Moved	An issue is moved.
Work Logged on Issue	Someone logs work done on the issue.
Work Started on Issue	An issue's status changes to in progress.
Work Stopped on Issue	An issue's status changes from in progress to open.
Generic Event	Configured by workflow.
Issue Scheduled	An issue is scheduled with the Schedule Issue screen.

9.2 MD Project Roles Configuration

In the 'MD Project Roles' notification configuration, the following people are notified for the following events:

Event	Notifies When Triggered
Issue Created	Current Assignee, Monitor, users in the Carbon Copy issue field
Issue Updated	All Watchers, Reporter, Current Assignee
Issue Assigned	Current Assignee
Issue Resolved	All Watchers, Reporter
Issue Closed	All Watchers, Current Assignee, Monitor
Issue Commented	All Watchers, Reporter, Current Assignee
Issue Reopened	All Watchers, Current Assignee, Monitor
Issue Deleted	None
Issue Moved	None
Work Logged on Issue	None
Work Started on Issue	None
Work Stopped on Issue	None
Generic Event	None
Issue Secured	None
Issue Checked	All Watchers, Reporter
Issue Scheduled	All Watchers, Current Assignee

All projects use the same configuration. This is not mandatory in JIRA, but cuts down on administration.

Note: Project Leads no longer receive email using this configuration, except when an issue is assigned to them. If a Project Lead wants to be informed of all issue creation, closure and reopening, the Project Lead can assign the Monitor role to himself.

9.3 Changing the Configuration

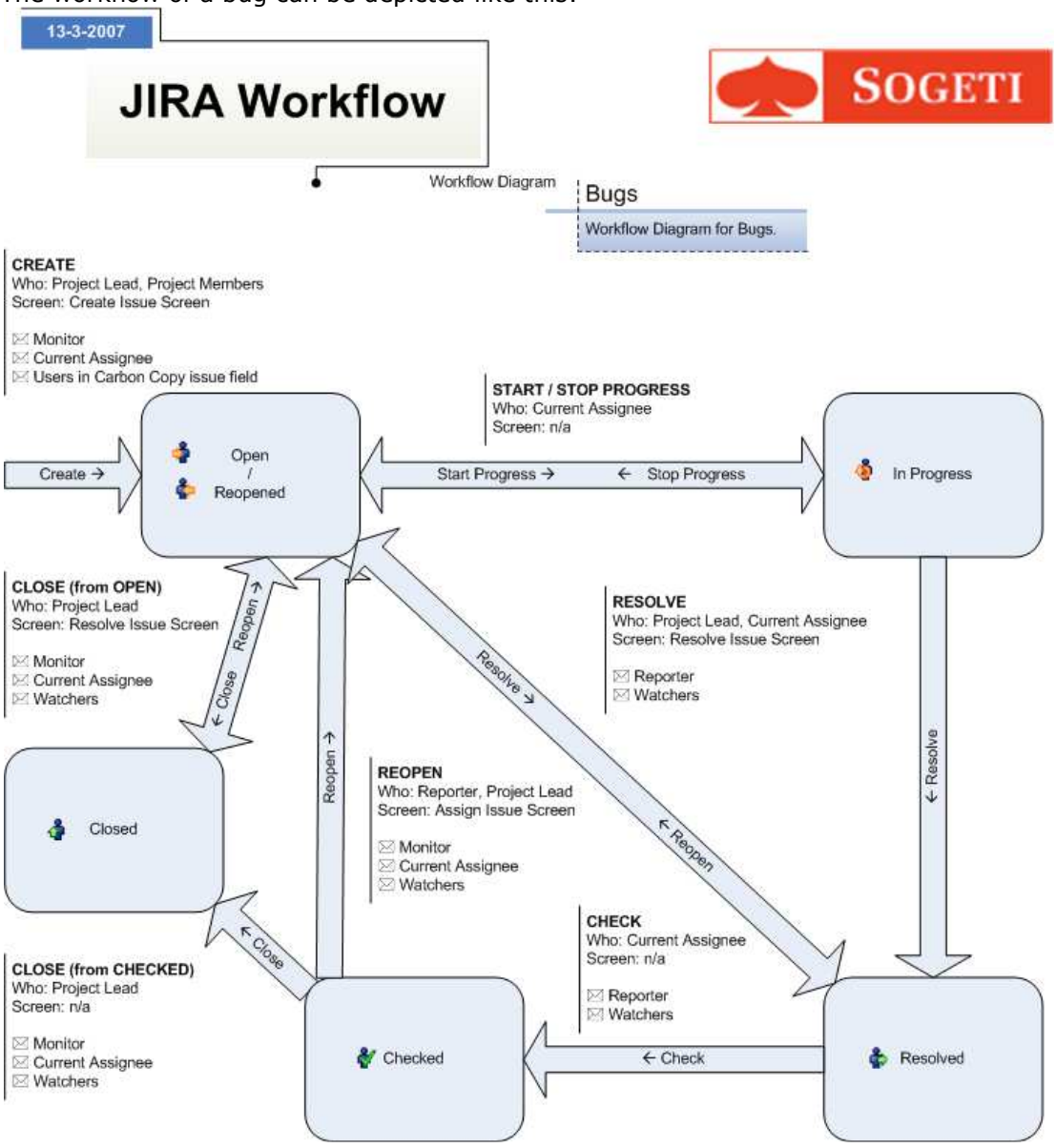
To change the notification configuration, do:

1. Click '**Administration**' from the main menu.
2. Click 'Notification Schemes' in the 'Schemes' submenu.
3. Click 'MD Project Roles' Managed Delivery Notification Scheme.
4. Click 'Del' to delete a notification.
5. Click 'Add' to add a notification, then select a notification event from the 'Events' multi select box and a group or role. Then press '***Add***'.

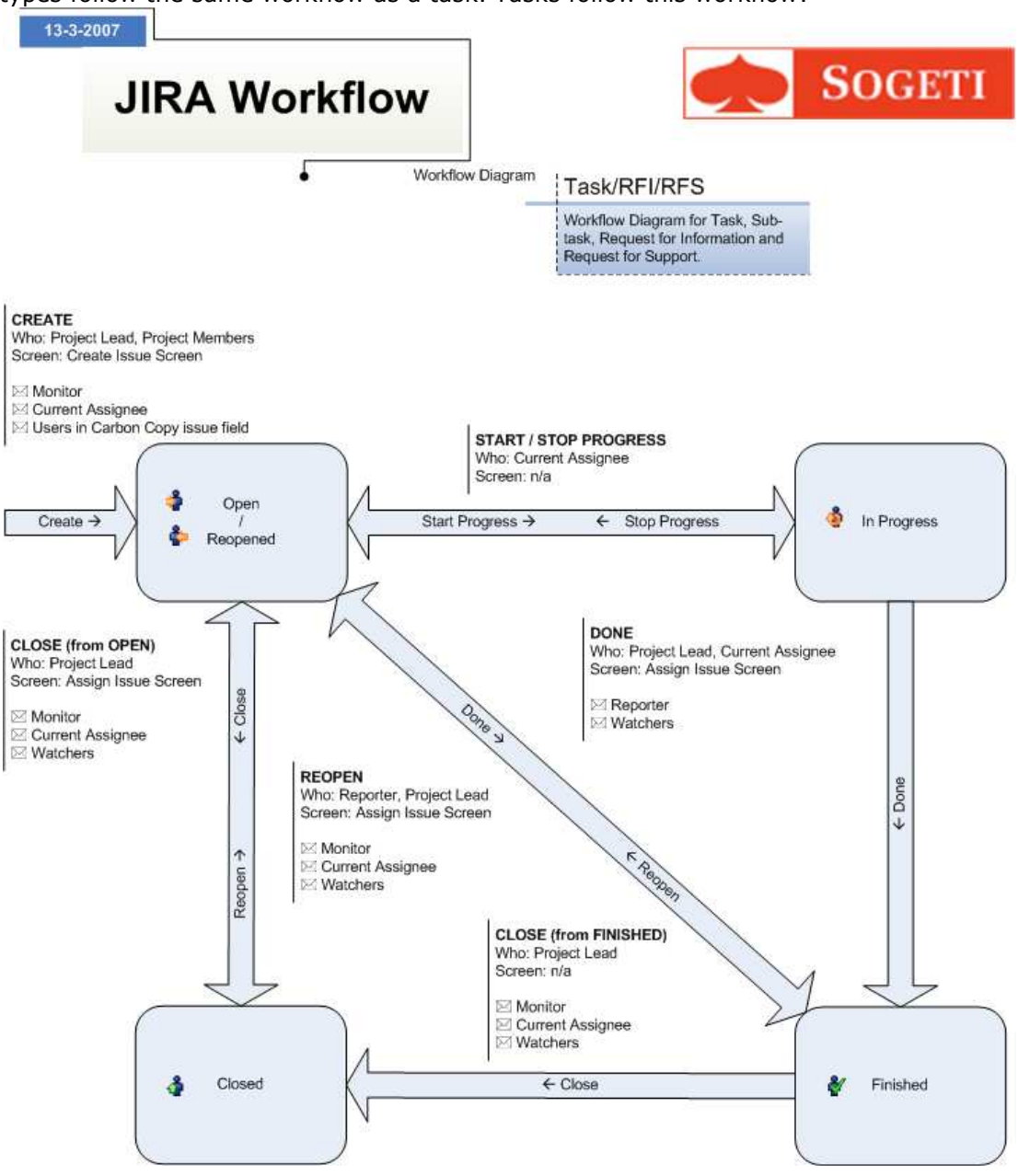
APPENDIX A: WORKFLOW OF AN ISSUE

There's a difference between the workflow of a bug and the workflow of a task. The workflow of a task is much simpler than that of a bug.

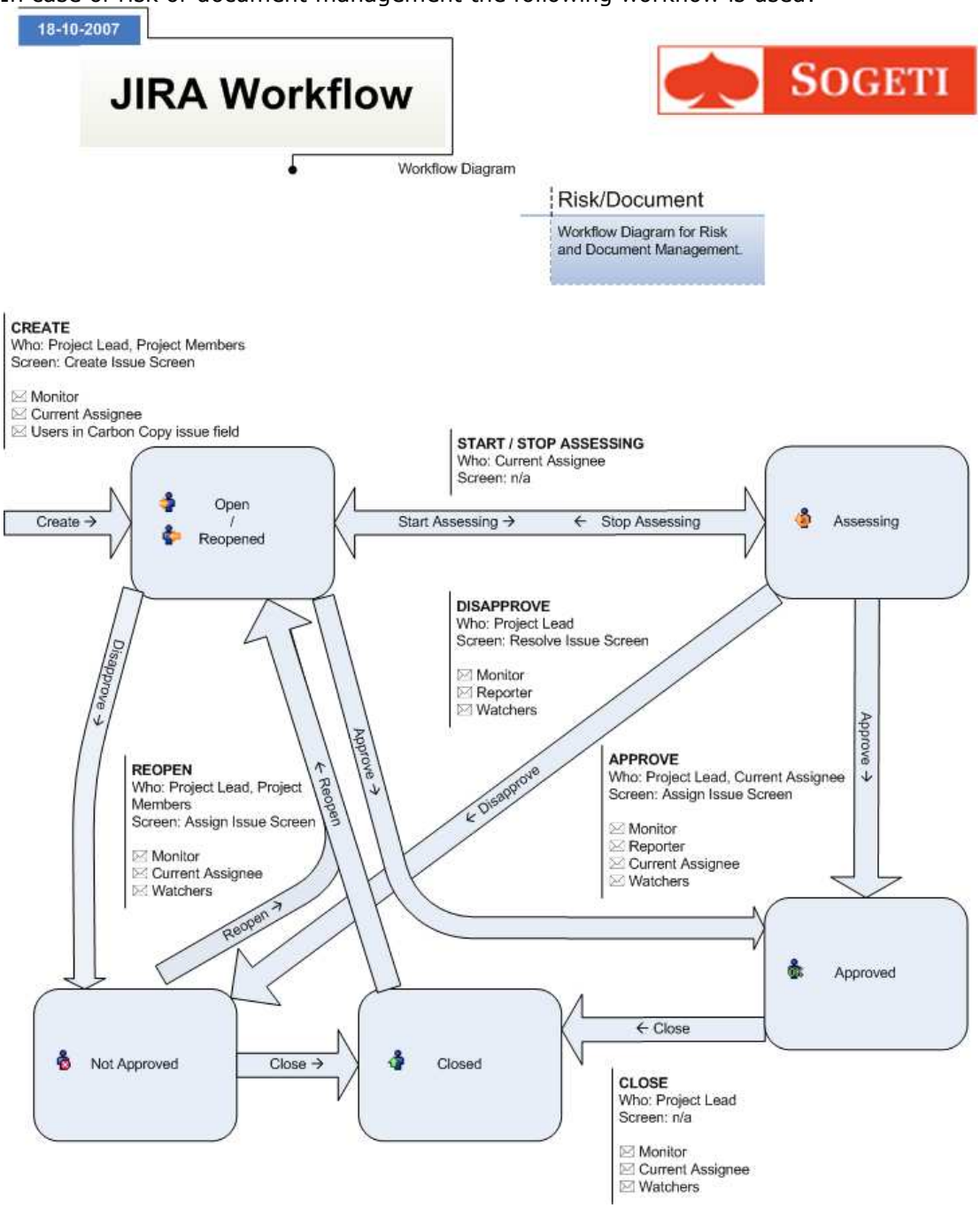
The workflow of a bug can be depicted like this:



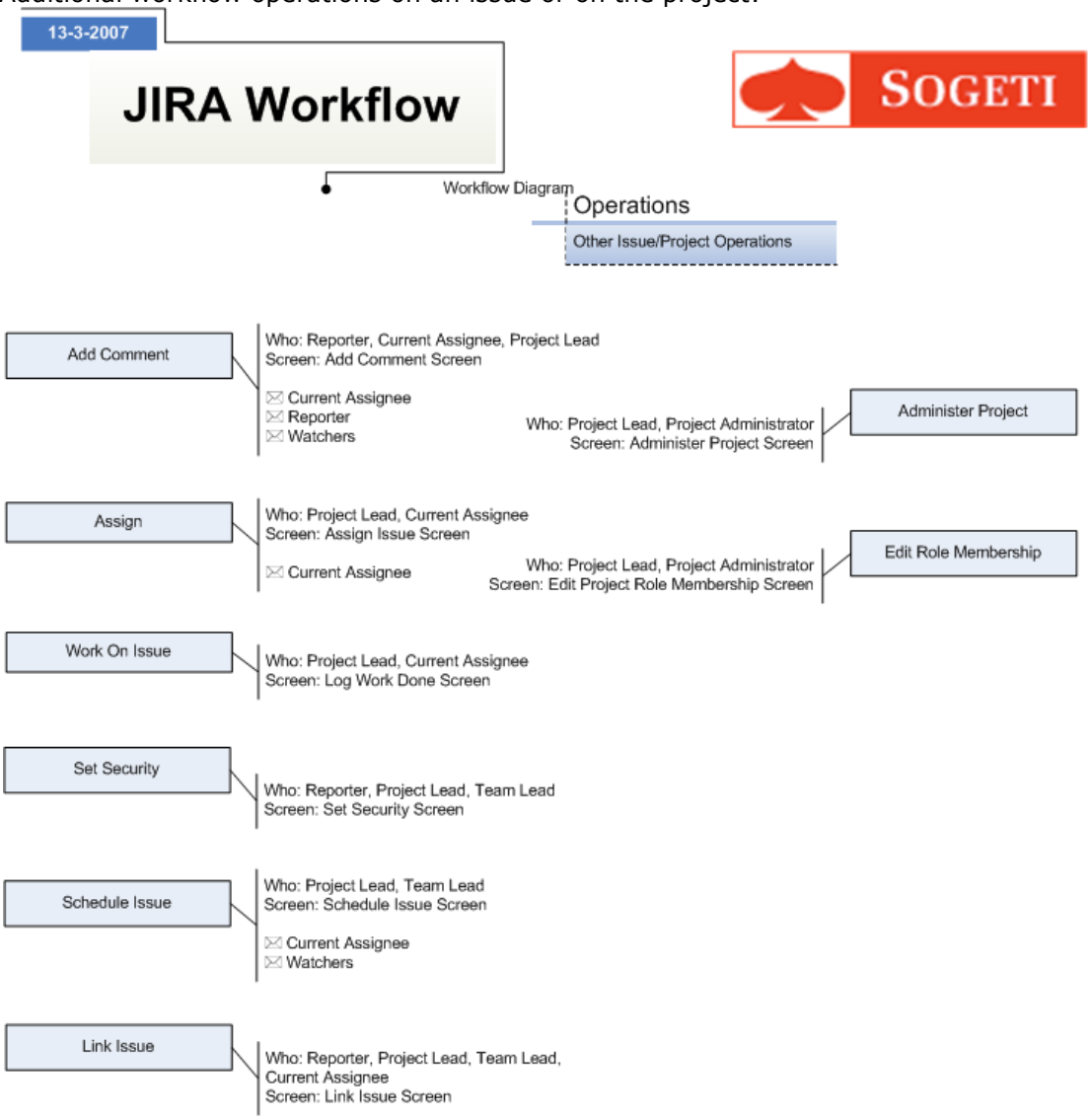
A task is an issue with an issue type of 'task', 'sub-task', 'RFI' or 'RFS'. All other issue types follow the same workflow as a task. Tasks follow this workflow:



In case of risk or document management the following workflow is used:



Additional workflow operations on an issue or on the project:



APPENDIX B: REFERENCE CARDS

On the following pages are a number of reference cards that you can print. These explain the different operations that you can do in a compact way, so you can keep them close at hand and look something up when you need to.

There are reference cards for the following people:

- Project Leads
- Team Leads
- Project Members
- Reporters
- Administrators

PROJECT LEAD

5.1 - Project Lead, page 35

3.2 - Create a New Issue, page 15

1. In the main menu, click on '**Create New Issue**'.
2. You are now in step 1 of 2 to create a new issue. Select the project for which you want to create a new issue and select the issue type. Then press '***Next>>***'.
3. You are now in step 2 of 2 to create a new issue. Since each project can have its own workflow and each issue type can have its own issue fields, it's not possible to give a list of fields here that must be entered. Generally there will be issue fields for a Summary, Security Level, Priority, Component/s, Affects Version/s and a Description. Of these only the Summary is mandatory, although Description might prove useful too!

   On a separate tab called 'Schedule Tab' you may (subject to permissions granted) edit fields that will schedule the issue. This includes setting the priority, assigning the issue to a certain user, setting the Due Date, etc..

   After entering appropriate values for the issue fields, press '***Create***' to create the issue.
4. You are now in the view issue screen. A number of things can be done in this screen, which will be discussed in the next chapter.

4.2 - Commenting on an Issue, page 21

1. In the view issue screen, click 'Comment' on this issue.
2. Type your comment in the 'Comment' text area.
3. Make sure that the 'Viewable By' select box is set to 'All Users'.
4. Press '***Add***'.

4.3 - Scheduling an Issue, page 22

1. In the view issue screen, click 'Schedule Issue'.
2. Set a (new) priority, Due Date, Original Estimate, Security Level and/or (new) assignee.
3. Type your comment in the 'Comment' text area (optional).
4. Make sure that the 'Viewable By' select box is set to 'All Users' or an appropriate project role.
5. Press '***Schedule Issue***'.

4.8 - Closing an Issue, page 27

1. In the view issue screen, click 'Close Issue'.
2. If the status of the issue was not Resolved, select a resolution from the 'Resolution' select box and select the fix versions in the 'Fix Version/s' multi select box, if appropriate, else set it to 'Unknown'.
3. Assign the issue to the Project Lead with the 'Assign To' select box.
4. Comment on the issue in the 'Update comment' text area.
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Close Issue***'.

4.12 - Setting Issue Security, page 30

1. In the view issue screen, click 'Set Security'.
2. Select the appropriate security level in the 'Security Level' select box.
3. Add an optional comment.
4. Press '***Set Security***' to change the security of the issue.

5.12 - Project Role Membership, page 44

To associate a user with a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the User column).
4. Type a username or click the user popup button to select users.
5. Multiple users can be added to a role at once. The usernames must be separated by a comma.
6. Press '***Add***'.

To remove a user from a role, do:
1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the User column).
4. Check the checkbox behind the user.
5. Multiple users can be removed at once. Check all the checkboxes of the users you want to remove.
6. Press '***Remove***'.

8.2.1 - Project Administration, page 65

To edit the project's name, URL, Description and/or Project Lead, do:
1. Click '**Administration**' from the main menu.
2. Find the project you want to edit, then click 'Edit' in the operations column.
3. Change the URL, Project Lead and/or Description.
4. Press '***Update***' to save the changes.

To add a component, do:
1. Click '**Administration**' from the main menu.
2. Find the project you want to edit, then click 'View' in the operations column.
3. You are now in the administer project screen.
4. Click 'Add' new component.
5. Type a name in the 'Name' edit box. Type a description in the 'Description' edit box. Select a Component Lead for the new component.
6. Press '***Create***' to create the new component.

To edit a component, do:
1. From the administer project screen, click 'Edit' behind the component name.
2. Change the name in the 'Name' edit box. Change the description in the 'Description' edit box. Select a new Component Lead.
3. Press '***Update***' to save the changes.

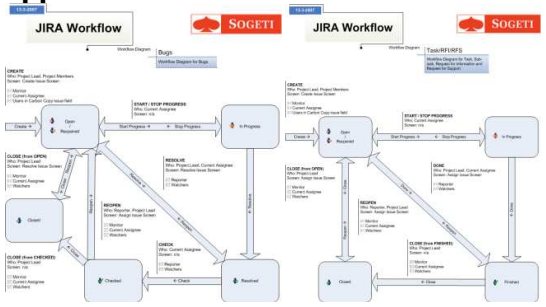
To delete a component, do:
1. From the administer project screen, click 'Delete' behind the component name.
2. Press '***Delete***' to remove the component.

To manage versions, do:
1. From the administer project screen, click 'Manage' versions.
2. You are now in the manage versions screen.
3. You can add a version by filling out the 'Add Version' box and pressing '***Add***'.
4. You can edit the version's details by clicking 'Edit Details', change the details (version number, description and release date) and then press '***Update***'.
5. To merge the issues from one or more versions into another, click 'Merge', then select the versions to merge and the version to merge them into and press '***Merge***'.
6. To release a version, click 'Release'. To undo releasing a version click 'Unrelease'.
7. To archive a version, click 'Archive'. To undo archiving a version click 'Unarchive'.
8. To delete a version, click 'Delete', check the radio button on the desired setting (swap current issues to (raised-in) version (and select the version), remove version from all issues), then press '***Delete***'.
9. To change the order of releases, use the arrows. Note: this does not change the release date. To change the release date, edit the version's details.

5.14 - Dummy Users, page 47

Username	Full Name
developer	Unspecified Developer
subcontractor	Unspecified Subcontractor
system-tester	Unspecified System Tester
delivery-tester	Unspecified Delivery Tester
acceptation-tester	Unspecified Acceptation Tester
end-user-tester	Unspecified End User Tester

Appendix A: Workflow of an Issue



TEAM LEAD

5.9 - Team Lead, page 43

3.2 - Create a New Issue, page 15

1. In the main menu, click on '**Create New Issue**'.
2. You are now in step 1 of 2 to create a new issue. Select the project for which you want to create a new issue and select the issue type. Then press '***Next>>***'.
3. You are now in step 2 of 2 to create a new issue. Since each project can have its own workflow and each issue type can have its own issue fields, it's not possible to give a list of fields here that must be entered. Generally there will be issue fields for a Summary, Security Level, Priority, Component/s, Affects Version/s and a Description. Of these only the Summary is mandatory, although Description might prove useful too!

   On a separate tab called 'Schedule Tab' you may (subject to permissions granted) edit fields that will schedule the issue. This includes setting the priority, assigning the issue to a certain user, setting the Due Date, etc..

   After entering appropriate values for the issue fields, press '***Create***' to create the issue.
4. You are now in the view issue screen. A number of things can be done in this screen, which will be discussed in the next chapter.

4.2 - Commenting on an Issue, page 21

1. In the view issue screen, click 'Comment' on this issue.
2. Type your comment in the 'Comment' text area.
3. Make sure that the 'Viewable By' select box is set to 'All Users'.
4. Press '***Add***'.

4.3 - Scheduling an Issue, page 22

1. In the view issue screen, click 'Schedule Issue'.
2. Set a (new) priority, Due Date, Original Estimate, Security Level and/or (new) assignee.
3. Type your comment in the 'Comment' text area (optional).
4. Make sure that the 'Viewable By' select box is set to 'All Users' or an appropriate project role.
5. Press '***Schedule Issue***'.

4.4 - When an Issue has been Assigned to You, page 22

1. Go to http://jira.sogeti.nl
2. You are now in the home page of JIRA. You are looking at the dashboard.
3. In the upper left corner you see a box titled Open Issues: 'Assigned To Me', followed by a list of issues. The issue you have just been assigned to should be somewhere in the list. Click on the issue id.

   The list contains a maximum of 5 items; if the new issue isn't there, click '**Assigned To Me**' to see all issues assigned to you in the issue navigator. From there you can find and select the new issue.
4. Alternatively, you can click the link in the email message that will bring you to the view issue screen of the particular issue directly.
5. You are now in the view issue screen. Depending on your permissions you can do a number of things. See 'After an Issue is Created' for a complete list.
6. Read the issue description carefully. Read the comments and work log if there are any. Look at the screenshots and open the attachments if any.
7. Decide if you want to resolve the issue yourself or if you want to assign it to someone else. To schedule an issue see 'Scheduling an Issue'.
8. If you are going to resolve the issue, then see 'Start Working on an Issue'.
9. If you are not going to resolve the issue yourself, you are of course still free to comment on the issue if you have something to add.

4.5.1 - Log Work Done, page 23

1. In the view issue screen, click 'Log work done'.
2. In the 'Time Spent' edit box, fill in the amount of work done (in weeks, days, hours and or minutes).
3. In the 'Adjust Estimate' radio buttons choose the appropriate value: 'Auto adjust' to subtract the time spent from

the current estimate, 'Estimate unknown' if an estimate can't be given or 'Set estimated time remaining'. If the last value is chosen the edit box below (for the new estimate) is mandatory.

4. Explain what you have been doing in the 'Work Description' text area.
5. Make sure that the 'Log Viewable By' select box is set to 'All Users'.
6. Press '***Log***' to log the work you have done.

4.7 - Resolving an Issue, page 25

1. In the view issue screen, click 'Resolve Issue'.
2. Choose the resolution for this issue in the 'Resolution' select box.
3. Choose the version of the application that fixes the problem or 'Unknown' if not applicable in the 'Fix Version/s' multi select box.
4. Assign the issue to the Project Lead, a tester, the reporter or a dummy user.
5. Detail the resolution in the 'Update Comment' text area.
6. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
7. Press '***Resolve***'.

4.8 - Closing an Issue, page 27

1. In the view issue screen, click 'Close Issue'.
2. If the status of the issue was not Resolved, select a resolution from the 'Resolution' select box and select the fix versions in the 'Fix Version/s' multi select box, if appropriate, else set it to 'Unknown'.
3. Assign the issue to the Project Lead with the 'Assign To' select box.
4. Comment on the issue in the 'Update comment' text area.
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Close Issue***'.

4.10 - Linking an Issue, page 29

1. In the view issue screen, click 'Link' this issue to another issue.
2. Select the link type in the 'This issue' select box. Currently only 'duplicates' and 'is duplicated by' are supported. Choose the appropriate value.
3. Type an issue id in the 'Issue' edit box or choose an issue in the '[select issue]' popup. It's possible to type or select more than one issue!
4. Type an optional comment in the 'Update comment' text area
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Link***'.

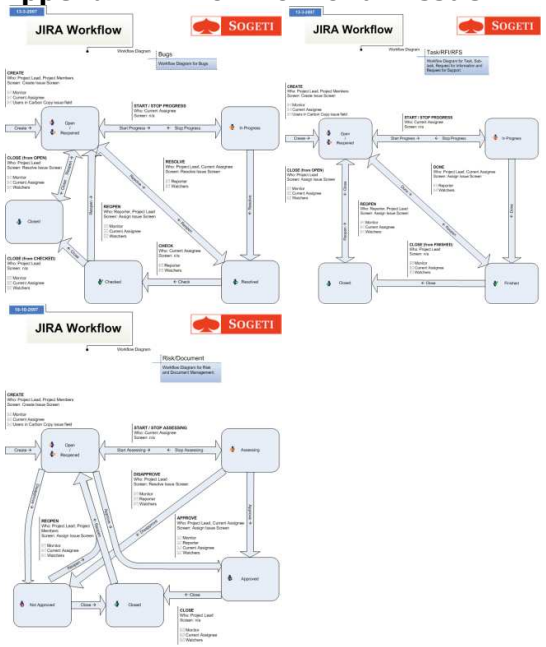
4.12 - Setting Issue Security, page 30

1. In the view issue screen, click 'Set Security'.
2. Select the appropriate security level in the 'Security Level' select box.
3. Add an optional comment.
4. Press '***Set Security***' to change the security of the issue.

5.14 - Dummy Users, page 47

Username	Full Name
developer	Unspecified Developer
subcontractor	Unspecified Subcontractor
system-tester	Unspecified System Tester
delivery-tester	Unspecified Delivery Tester
acceptation-tester	Unspecified Acceptation Tester
end-user-tester	Unspecified End User Tester

Appendix A: Workflow of an Issue



PROJECT MEMBERS

5.3 - Project Member, page 37

3.2 - Create a New Issue, page 15

1. In the main menu, click on '**Create New Issue**'.
2. You are now in step 1 of 2 to create a new issue. Select the project for which you want to create a new issue and select the issue type. Then press '***Next>>***'.
3. You are now in step 2 of 2 to create a new issue. Since each project can have its own workflow and each issue type can have its own issue fields, it's not possible to give a list of fields here that must be entered. Generally there will be issue fields for a Summary, Security Level, Priority, Component/s, Affects Version/s and a Description. Of these only the Summary is mandatory, although Description might prove useful too!

   On a separate tab called 'Schedule Tab' you may (subject to permissions granted) edit fields that will schedule the issue. This includes setting the priority, assigning the issue to a certain user, setting the Due Date, etc..

   After entering appropriate values for the issue fields, press '***Create***' to create the issue.
4. You are now in the view issue screen. A number of things can be done in this screen, which will be discussed in the next chapter.

4.2 - Commenting on an Issue, page 21

1. In the view issue screen, click 'Comment' on this issue.
2. Type your comment in the 'Comment' text area.
3. Make sure that the 'Viewable By' select box is set to 'All Users'.
4. Press '***Add***'.

4.3 - Scheduling an Issue, page 22

1. In the view issue screen, click 'Schedule Issue'.
2. Set a (new) priority, Due Date, Original Estimate, Security Level and/or (new) assignee.
3. Type your comment in the 'Comment' text area (optional).
4. Make sure that the 'Viewable By' select box is set to 'All Users' or an appropriate project role.
5. Press '***Schedule Issue***'.

4.4 - When an Issue has been Assigned to You, page 22

1. Go to http://jira.sogeti.nl
2. You are now in the home page of JIRA. You are looking at the dashboard.
3. In the upper left corner you see a box titled Open Issues: 'Assigned To Me', followed by a list of issues. The issue you have just been assigned to should be somewhere in the list. Click on the issue id.

   The list contains a maximum of 5 items; if the new issue isn't there, click '**Assigned To Me**' to see all issues assigned to you in the issue navigator. From there you can find and select the new issue.
4. Alternatively, you can click the link in the email message that will bring you to the view issue screen of the particular issue directly.
5. You are now in the view issue screen. Depending on your permissions you can do a number of things. See 'After an Issue is Created' for a complete list.
6. Read the issue description carefully. Read the comments and work log if there are any. Look at the screenshots and open the attachments if any.
7. Decide if you can resolve the issue yourself or if you want to assign it to someone else.
8. If you think you can't handle the issue or the issue should not have been assigned to you, contact the Project Lead or a Team Lead. He will then assign the issue to someone else.

   You are of course still free to comment on the issue if you have something to add.
9. If you are going to resolve the issue, then see 'Start Working on an Issue'.

4.5 - Start Working on an Issue, page 23

1. In the view issue screen, click on 'Start Progress'.
2. If there are any details that need clearing up, call the customer. In a

maintenance situation the reporter will usually also be the customer, so you know whom to contact.

3. After contacting the customer, make sure to report on the conversation by adding a comment. See 'Commenting on an Issue'.
4. Next, do your analyses of the issue.

4.5.1 - Log Work Done, page 23

1. In the view issue screen, click 'Log work done'.
2. In the 'Time Spent' edit box, fill in the amount of work done (in weeks, days, hours and or minutes).
3. In the 'Adjust Estimate' radio buttons choose the appropriate value: 'Auto adjust' to subtract the time spent from the current estimate, 'Estimate unknown' if an estimate can't be given or 'Set estimated time remaining'. If the last value is chosen the edit box below (for the new estimate) is mandatory.
4. Explain what you have been doing in the 'Work Description' text area.
5. Make sure that the 'Log Viewable By' select box is set to 'All Users'.
6. Press '***Log***' to log the work you have done.

4.6 - Stop Working on an Issue, page 24

1. You have finished your analyses and the issue is resolved to something that you can't solve in the application (for instance a testing error).
2. You have finished your analyses and the issue appears to be a duplicate of an earlier issue.
3. You have finished your analyses and the issue needs to be fixed in the application.
4. You are stuck. You either need more or new information or the issue will never be solved. The issue might also be impossible to reproduce.

4.7 - Resolving an Issue, page 25

1. In the view issue screen, click 'Resolve Issue'.
2. Choose the resolution for this issue in the 'Resolution' select box.
3. Choose the version of the application that fixes the problem or 'Unknown' if not applicable in the 'Fix Version/s' multi select box.
4. Assign the issue to the Project Lead, a tester, the reporter or a dummy user.
5. Detail the resolution in the 'Update Comment' text area.
6. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
7. Press '***Resolve***'.

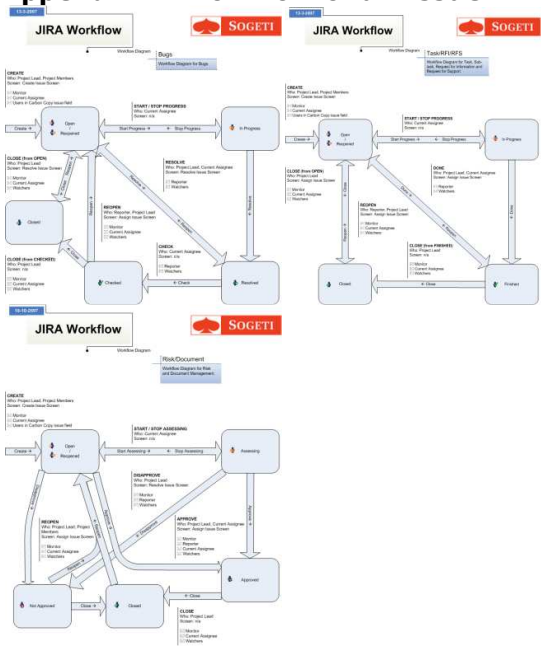
4.10 - Linking an Issue, page 29

1. In the view issue screen, click 'Link' this issue to another issue.
2. Select the link type in the 'This issue' select box. Currently only 'duplicates' and 'is duplicated by' are supported. Choose the appropriate value.
3. Type an issue id in the 'Issue' edit box or choose an issue in the '[select issue]' popup. It's possible to type or select more than one issue!
4. Type an optional comment in the 'Update comment' text area
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Link***'.

5.14 - Dummy Users, page 47

Username	Full Name
developer	Unspecified Developer
subcontractor	Unspecified Subcontractor
system-tester	Unspecified System Tester
delivery-tester	Unspecified Delivery Tester
acceptation-tester	Unspecified Acceptation Tester
end-user-tester	Unspecified End User Tester

Appendix A: Workflow of an Issue



REPORTER

5.4 - Issue Reporter, page 39

3.2 - Create a New Issue, page 15

1. In the main menu, click on '**Create New Issue**'.
2. You are now in step 1 of 2 to create a new issue. Select the project for which you want to create a new issue and select the issue type. Then press '***Next>>***'.
3. You are now in step 2 of 2 to create a new issue. Since each project can have its own workflow and each issue type can have its own issue fields, it's not possible to give a list of fields here that must be entered. Generally there will be issue fields for a Summary, Security Level, Priority, Component/s, Affects Version/s and a Description. Of these only the Summary is mandatory, although Description might prove useful too!

   On a separate tab called 'Schedule Tab' you may (subject to permissions granted) edit fields that will schedule the issue. This includes setting the priority, assigning the issue to a certain user, setting the Due Date, etc..

   After entering appropriate values for the issue fields, press '***Create***' to create the issue.
4. You are now in the view issue screen. A number of things can be done in this screen, which will be discussed in the next chapter.

4.2 - Commenting on an Issue, page 21

1. In the view issue screen, click 'Comment' on this issue.
2. Type your comment in the 'Comment' text area.
3. Make sure that the 'Viewable By' select box is set to 'All Users'.
4. Press '***Add***'.

4.8 - Closing an Issue, page 27

1. In the view issue screen, click 'Close Issue'.
2. If the status of the issue was not Resolved, select a resolution from the 'Resolution' select box and select the fix versions in the 'Fix Version/s' multi select box, if appropriate, else set it to 'Unknown'.
3. Assign the issue to the Project Lead with the 'Assign To' select box.
4. Comment on the issue in the 'Update comment' text area.
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press 'Close Issue'.

4.10 - Linking an Issue, page 29

1. In the view issue screen, click 'Link' this issue to another issue.
2. Select the link type in the 'This issue' select box. Currently only 'duplicates' and 'is duplicated by' are supported. Choose the appropriate value.
3. Type an issue id in the 'Issue' edit box or choose an issue in the '[select issue]' popup. It's possible to type or select more than one issue!
4. Type an optional comment in the 'Update comment' text area
5. Make sure the 'Comment Viewable By' select box is set to 'All Users'.
6. Press '***Link***'.

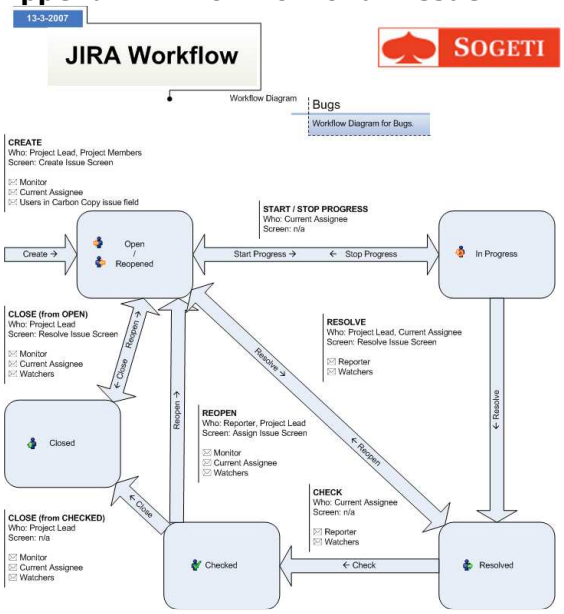
4.12 - Setting Issue Security, page 30

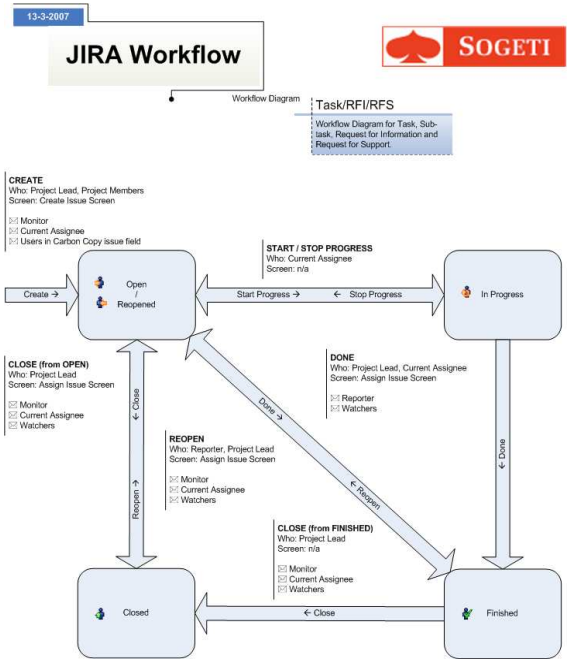
1. In the view issue screen, click 'Set Security'.
2. Select the appropriate security level in the 'Security Level' select box.
3. Add an optional comment.
4. Press '***Set Security***' to change the security of the issue.

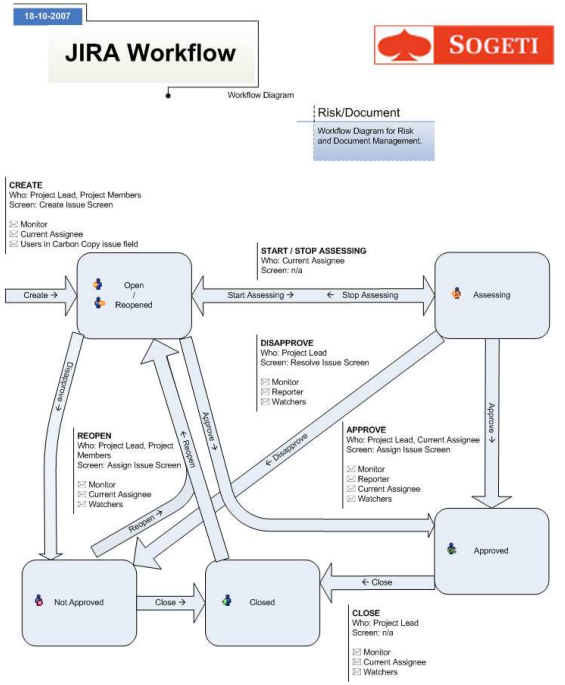
5.14 - Dummy Users, page 47

Username	Full Name
developer	Unspecified Developer
subcontractor	Unspecified Subcontractor
system-tester	Unspecified System Tester
delivery-tester	Unspecified Delivery Tester
acceptation-tester	Unspecified Acceptation Tester
end-user-tester	Unspecified End User Tester

Appendix A: Workflow of an Issue







ADMINISTRATOR

5.11 - JIRA Administrator, page 44

5.12 - Project Role Membership, page 44

To associate a user with a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the User column).
4. Type a username or click the user popup button to select users.
5. Multiple users can be added to a role at once. The usernames must be separated by a comma.
6. Press '***Add***'.

To remove a user from a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the User column).
4. Check the checkbox behind the user.
5. Multiple users can be removed at once. Check all the checkboxes of the users you want to remove.
6. Press '***Remove***'.

To associate a group with a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the Group column).
4. Select a group in the left column (the 'Available Groups' column).
5. Multiple groups can be selected at once.
6. Press '***Join>>***'.

To remove a group from a role, do:

1. In the view project screen, click 'Administer Project'.
2. Click 'Project Roles: View members' to display the role membership screen.
3. Click the 'Edit' link in the appropriate cell of the table (in the Group column).
4. Select a group in the right column (the 'Groups in Project Role' column).
5. Multiple groups can be selected at once.
6. Press '***<<Leave***'.

7.1 - Create a User, page 57

1. Click the '**Administration**' link in the main menu.
2. Click the 'User Browser' link in the '*Users & Groups*' menu.
3. Click 'Add User'.
4. Alternatively you can click 'create a new user' from the Administration portlet from the dashboard.
5. Type the username (usually the network username of the employee) in the 'Username' text box.
6. If the user is indeed an employee of Sogeti, leave the 'Password' and 'Confirm' text boxes empty. The network username will be used instead. If the user is not an employee of Sogeti, type the agreed upon password in the 'Password' text box and then type it again in the 'Confirm' text box (to prevent typos).
7. Type the full name of the user in the 'Full Name' text box. Type the email address in the 'Email' text box.
8. Uncheck the 'Send Password Email' checkbox if the user is an employee of Sogeti.
9. Press '***Create***' to create the new user.
10. Click 'Edit Groups' to edit the team membership of the new user. Add the groups to which the user should be added (see 7.3 'Group Membership' for more information).

7.2 - Administer User, page 57

1. Click the '**Administration**' link in the main menu.
2. Click the 'User Browser' link in the '*Users & Groups*' menu.
3. Alternatively you can click 'users' from the Administration portlet from the dashboard.
4. Find the user you want to administer, either by browsing through the list or by using the filter to narrow the list of users.
5. Click the 'Groups' link in the operations column to edit the team membership of the user. See '7.3 Group Membership'

for more information.
Click the 'Edit' link in the operations column to edit the full name and email address of the user. Press '***Update***' to save the changes.
Click the 'Delete' link in the operations column to remove the user from JIRA. Press '***Delete***' to delete the user.

To change a users password, do:
1. Click the '**Administration**' link in the main menu.
2. Click the 'User Browser' link in the '*Users & Groups*' menu.
3. Alternatively you can click 'users' from the Administration portlet from the dashboard.
4. Find the user you want to administer, either by browsing through the list or by using the filter to narrow the list of users.
5. Click the username or email address.
6. Click 'Set Password'.
7. Type the password in the 'Password' text box.
8. Type the password again in the 'Confirm' text box to prevent typos.
9. Press '***Update***' to change the password.

7.3.5 - Creating a Group, page 60
1. Click '**Administration**' from the main menu.
2. Then click 'Group Browser' in the Users & Groups submenu.
3. Alternatively click 'groups' in the Administration portlet on the home page.
4. You are now in the group browser screen.
5. Type a name in the 'Name' text box.
6. Press '***Add Group***' to create the (empty) group.

7.3.6 - Adding an Existing User to a Group, page 61
1. Click '**Administration**' from the main menu.
2. Click 'User Browser' in the Users & Groups submenu.
3. Alternatively click 'users' in the Administration portlet on the home page.
4. You are now in the user browser screen.
5. Select the user by browsing through the various screens. Use filtering to limit the users that you see.
6. Click 'Groups' in the operations column of the user you want to add to the group.
7. Select the group in the 'Available Groups' multi select box.
8. Press '***Join>>***' to add the groups to the user's groups.

Alternatively, you can use the Bulk Edit Group Members screen. Do:
1. Click '**Administration**' from the main menu.
2. Then click 'Group Browser' in the Users & Groups submenu.
3. Alternatively click 'groups' in the Administration portlet on the home page.
4. You are now in the group browser screen.
5. Click 'Bulk Edit Group Members'.
6. Select one or more groups in the 'Selected # of ### Groups' select box.
7. In the blue box that appears below the select box, click 'Click here' to refresh the 'Group Members' column.
8. Alternatively, you can click the 'Edit Members' link in the operations column of the group you want to edit. This will display the group in the 'Group Members' column in one go.
9. Type usernames in the 'Add members in the selected group(s)' column, separated by commas. You can also use the User Picker popup by clicking the icon besides the edit box.
10. Select one or more groups in the 'Group Member(s)' column. Users will be added to all selected groups.
11. Press '***<<Join***'.
12. Select users in the 'Group Member(s)' multi select box and press '***Leave>>***' to remove user(s) from group(s).

8.1 - Creating a New Project, page 63

1. Click '**Administration**' from the main menu.
2. Click 'Projects' from the 'Project' submenu.
3. Click 'Add Project'.
4. Alternatively click Projects: 'create new' in the Administration portlet on the home page.
5. Type a name in the 'Name' edit box, using the naming convention '<Customer> <Project>'.
6. Type a Project Key in the 'Key' edit box, using the naming convention '<Division code>/<Customer code>/<Project code>'. **Warning: after creating the project, the key cannot be changed!** So make sure it is correct.
7. Type an (optional) URL to the Wiki page of the project.
8. Select the Project Lead. This is the (technical) project leader of the project.
9. Type a description in the 'Description' text area. You can use HTML mark-up. For instance (remove the lines that are not applicable):
   <h1>MD Project for [customer]: [project name]</h1>

This is an MD project for [customer]: [project description].

Project Lead: [project leader]

Project Manager: [project manager]

Account Manager: [account manager]

Service Manager: [service manager]

Functional Design: [functional designer]

Software Architect: [software architect]

Lead Developer: [lead developer]

Test Manager: [test manager]

Test Coordinator: [test coordinator]
10. Select the 'MD Project Roles' notification scheme in the 'Notification Scheme' select box.
11. Select the 'MD Project Roles' permission scheme in the 'Permission Scheme' select box.
12. Select the 'MD Project Roles' security scheme in the 'Issue Security Scheme' select box.
13. Press '***Create***' to create the new project.
14. Click Issue Type Screen Scheme: 'Select'.
15. Select the 'MD Project Roles' issue type screen scheme in the 'Scheme' select box.
16. Press '***Associate***' to set the issue type screen scheme.
17. Click Workflow Scheme: 'Select'.
18. Select the 'md-project-roles' workflow scheme in the 'Scheme' select box.
19. Press '***Associate***'.
20. Read the notice. Since this is a new project, there are no issues, so we can proceed without problems.
21. Press '***Associate***' again to associate the workflow with the project.
22. Click Project Category: 'Select Category'.
23. Select the appropriate project category in the 'Project Category' select box.
24. Press '***Select***' to set the category.

8.2.2 - Administrator's Administer Project, page 67

1. From the home page, click the project you want to administer in the 'All projects' portlet.
2. Alternatively click '**Browse Project**' from the main menu, then click 'Projects' and find the project. Click on it.
3. Now click 'Administer Project'.
4. Alternatively click '**Administration**' from the main menu, then find and click the project you want to administer.
5. You are now in the administer project screen.

8.3 - Permission Schemes, page 67

With the introduction of project roles, we will be using one permission scheme, 'MD Project Roles', for all projects. There should be no need to create new permission schemes for other projects.

To associate a permission scheme with a project, do:

1. From the home page, click the project you want to administer in the 'All projects' portlet.
2. Alternatively click '**Browse Project**' from the main menu, then click 'Projects' and find the project. Click on it.
3. Now click 'Administer Project'.
4. Alternatively click '**Administration**' from the main menu, then find and click the project you want to administer.
5. You are now in the administer project screen.
6. Click Permission Scheme: 'Select'.
7. Select the permission scheme in the 'Scheme' select box.
8. Press '***Associate***'.

5.13 - How To Use Project Roles, page 46

6.7 - A Note on Search Syntax, page 54

A query is broken up into terms.

JIRA supports the following **wildcards**:

- ? (question mark) – matches a single character
- * (asterisk) – matches zero or more characters

The following operators are supported:

- **OR**, || – logical or; combines two terms where only one of the two is required. This is the default when searching with more than one term.
  Example: hello world, will find issues with either hello or world.
- **AND** – logical and; combines two terms where both are required.
  Example: hello AND world, will find issues that have both hello and world.
- **NOT**, ! – logical not; combines two terms where the second term should not appear in the results. You cannot use not with only one term.
  Example: hello ! world, will find issues with hello that do not have world.
- **+** – a required term; to search for issues that must contain the specified term.
  Example: +hello world, will find issues with hello and may have world.
- **-** – an excluded term; to search for issues that may not contain the specified term. The difference with the NOT operator is that the exclusion cannot be used with grouping and NOT can.

9 - Notifications, page 69

Event	Notifies When Triggered
Issue Created	Current Assignee, Monitor, users in the Carbon Copy issue field
Issue Updated	All Watchers, Reporter, Current Assignee
Issue Assigned	Current Assignee
Issue Resolved	All Watchers, Reporter
Issue Closed	All Watchers, Current Assignee, Monitor
Issue Commented	All Watchers, Reporter, Current Assignee
Issue Reopened	All Watchers, Current Assignee, Monitor
Issue Deleted	None
Issue Moved	None
Work Logged on Issue	None
Work Started on Issue	None
Work Stopped on Issue	None
Generic Event	None
Issue Secured	None
Issue Checked	All Watchers, Reporter
Issue Scheduled	All Watchers, Current Assignee

5.14 - Dummy Users, page 47

Username	Full Name
developer	Unspecified Developer
subcontractor	Unspecified Subcontractor
system-tester	Unspecified System Tester
delivery-tester	Unspecified Delivery Tester
acceptation-tester	Unspecified Acceptation Tester
end-user-tester	Unspecified End User Tester

Appendix A: Workflow of an Issue