



Jira & Confluence Training

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LAB 1

EFFECTIVE ISSUE CREATION AND LINKING

Exercise 1 - Creating an Epic

Estimated Time: 10 minutes

1. Log into **Jira**.
2. At the top left of the main navigation bar, click the **waffle icon**.
3. Under the **Switch to** column, locate the **Jira Software** icon.
4. From the drop-down list, select the **dish-wireless-training** option.
5. From the **Projects** drop-down list, select the **View all projects** option.
 - a. **Note:** The instance may prepopulate to the Projects screen as soon as you select the Wireless Training option.
6. Select the **Training** project.
7. At the top of the screen, click the blue **Create** button.
 - a. The Create Issue screen displays.
8. In the Project drop-down field, ensure the **Atlassian Training (JC101)** option prepopulates.
9. In the **Issue Type** field, select the **Epic** option.
 - a. **Note:** This screen automatically defaults to creating a Story. If you're creating an Epic, double-check the correct issue type is selected.
10. In the **Summary** field, input an appropriate summary for the work you're adding to the project.
11. In the **Description** field, input the applicable description for the Epic.
12. In the **Assignee** field, select yourself from the drop-down list.
13. In the **Target Start** field, enter the planned date for work to start on the epic.
 - a. **Note:** Remember, the estimated timeframe for an epic is about one month for completion.
14. In the **Target End** field, select the estimated date the work on the epic should be completed by.
15. In the **Attachment** field, add an attachment if applicable.
16. At the bottom of the screen, select the **Create another issue** checkbox.

- a. **Note:** In the future, if you are only creating one issue, checking this box is not necessary.

17. Click the **Create** button.

You've successfully created an Epic in the Training Project!

You're going to create another Epic in the same project. If you selected the **Create another issue** checkbox, you remain on the Create Issue screen. Repeat steps 8 - 16.

Continue to the next exercise to create stories.

Exercise 2 - Creating a Story

Estimated Time: 10 minutes

1. From the Projects drop-down list, select the **View all projects** option.
 - a. **Note:** The instance may prepopulate to the **Projects** screen as soon as you select the Wireless Training option.
2. Select the **Training** project.
3. At the top of the screen, click the blue **Create** button.
 - a. The **Create Issue** screen displays.
4. In the **Project** drop-down field, ensure the **Atlassian Training (JC101)** option prepopulates.
5. In the **Issue Type** field, select the **Story** option.
6. In the **Summary** field, input an appropriate summary for the work you're adding to the project.
7. In the **Description** field, input the applicable description for the Story.
8. In the **Assignee** field, select yourself from the drop-down list.
9. In the **Sprint** field, select the applicable Sprint for the story.
10. In the **Story point** estimate field, input the applicable numerical value associated with the length of the work and its complexity.
11. In the **Target Start** field, enter the planned date for work to start on the Story.

12. In the **Target End** field, select the estimated date the work on the epic should be completed by.
13. In the **Attachment** field, add an attachment if applicable.
14. At the bottom of the screen, select the **Create another issue** checkbox.
 - a. **Note:** In the future, if you are only creating one issue, checking this box is not necessary.
15. Click the **Create** button.

You've successfully created a Story in the Training Project!

You're going to create three more stories in the same project. If you selected the Create another issue checkbox, you remain on the Create Issue screen. Repeat steps 3 - 15.

Exercise 3 - Linking Issues

Estimated Time: 5 minutes

1. At the top of the main navigation bar, select the **Your Work** option.
2. Click the **Go to your work page**
3. Select one of the Stories you've previously created.
 - a. **Note:** These will have a green box next to their name. Epics have purple box icons.
4. On the right side of the screen, select the **Epic Link** dropdown.
5. Search for and select one of the Epics you've created. Select the applicable Epic to affiliate to this story.
6. The story now appears as a linked issue on the epic that you can click into.
7. Depending on your setting, the Epic might be **is blocked by** a story, meaning it cannot be closed out until the story is closed out.

Congratulations on completing this lab!

LAB 2

FILTERS & JQL

Exercise 4 - Performing a Basic Search

Estimated Time: 5 minutes

The next few exercises will lead to the creation of a Dashboard, starting with a Basic Search of the issues you created.

1. Choose **Search > View all issues**. If the advanced search is shown instead of basic, click **Switch to basic**. You can also reach this view by clicking **Filters > Advanced Issue Search**.
2. Set your search criteria by clicking the **Assignee** drop down.
 - a. Find your name in the Assignee list, then click it.
3. Click Search.

Exercise 5 - Creating and Saving a Filter

Estimated Time: 5 minutes

The next few exercises will lead to the creation of a Dashboard, starting with a Basic Search of the issues you created.

1. Save the Basic Search you just created by clicking "**Save as**" next to the **Search** header.
2. Type in a name for your Filter in the **Filter Name** field.
3. Once the filter is named, click the blue **Submit** button.
4. To share the filter, click the **Details** button next to **Save As**.
5. Click the **Edit Permissions** link.
6. Under the Viewers dropdown, select "My Organization."
 - a. Click **Add**
 - b. Click the blue **Save** button.

Exercise 6 - Performing a JQL Search

Estimated Time: 5 minutes

We will now perform a more advanced search using JQL. This will be done by creating a JQL Query that finds all of the Issues you've created on the current date.

1. Choose **Search > View all issues**. If the Basic search is shown instead of JQL, click **Switch to JQL**. You can also reach this view by clicking **Filters > Advanced Issue Search**.
2. Perform the following JQL Query:
 - a. Project = **JC101** AND assignee = **currentUser()** AND createdDate = **now()**
3. Save this JQL Query as a Filter. Refer to Exercise 5 if you need a refresher.

Congratulations on completing this lab.

LAB 3

DASHBOARDS & ADVANCED ROADMAPS

Exercise 7 - Creating a Dashboard

Estimated Time: 5 minutes

Now we will create a Dashboard based off of your JQL Query.

1. From the Navigation Bar, click **Dashboards > Create Dashboard**
 - a. The **Create Dashboard Window** displays
2. In the **Name** field, enter an applicable name for your Dashboard.
 - a. In this case, simply write [YOUR NAME]'s Dashboard
3. In the Viewers field, select **My Organization** from the dropdown.
4. Click the **Add** button
5. Click the **Save** button.

Your Dashboard has now been created.

Exercise 8 - Adding a Dashboard Widget

Estimated Time: 10 minutes

1. In your new Dashboard, click the **Add Gadget** button
 - a. **Note:** if you do not see the **Add Gadget** button, click the **Edit** button.
2. A Column will pop up on the right side of the screen.
3. Add the **Issue Statistics** gadget by clicking the blue **Add** button.
 - a. **Note:** if you do not see the Issues Statistics gadget, search for it using the Search tool at the top of the Gadget column.
4. In the Issue Statistics column, search for the JQL Filter you created in Exercise 6.
 - a. Then click the **Save** button.
5. Click the blue **Done** button.

Exercise 9 - Creating an Advanced Roadmap

Estimated Time: 5 minutes

1. Select **Plans** > **Create Plan** from the Navigation Bar at the top of the page.
2. Enter the name of your Plan.
3. Under **Issue Sources**, add your Filter by selecting **Filter** from the Dropdown.
 - a. Then choose your Filter.
4. Click **Add Another Source**
 - a. Then add a Filter from another Team Member.
5. Repeat Step 4 a few times until you have a good range of Stories.
6. Click the blue **Create** button.

Exercise 10 - Adding a Dependency Between Stories

Estimated Time: 5 minutes

1. Select two stories you'd like to create a dependency between.
2. Hover over one of these stories so that a plus sign appears.
3. You can now add the Dependency one of two ways:
 - a. Method 1**
 - i. Click the plus sign next to the story. Clicking the left plus sign will make the story "is blocked by." Clicking the right plus sign will make the story the blocker.
 - ii. Select the effected story by clicking "**Choose an Issue**", then click the Checkmark.
 - b. Method 2**
 - i. Drag the plus sign from one story to the other story. This will automatically create the dependency.
 - ii. **Note:** This is an easy way to connect two stories if they are close to each other on the Roadmap.

Exercise 11 - Reviewing and Confirming Changes

Estimated Time: 5 minutes

Advanced Roadmap changes are not applied to issues unless they are reviewed and saved.

1. Click the blue **Review Changes** button at the top right of the screen.
 - a. **Note:** the number next to the button indicates how many changes will be made if they are saved.
2. In the **Review changes** module, click the blue **Save selected changes in Jira** button to confirm the changes.
 - a. **Note:** You can deselect any changes you don't want to apply by unchecking them on the left side of the module.

Congratulations on completing the Lab.

LAB 4

Confluence Permissions

Exercise 12 - Space Permissions

Estimated Time: 5 minutes

To edit the permissions of a Space:

1. Click the **Space Settings** tab on the left-hand side of Confluence. Then click **General** under **Space Permissions**.
2. Click the **Edit Permissions** button at the bottom of the page.
3. Add a User to the Space by typing their name in, then clicking the Add button.
4. Select the permissions you'd like the User to have by clicking the check boxes for each Permission Type.
5. Click the Save all button at the bottom of the page to save the permissions.

Exercise 13 - Page Restrictions

Estimated Time: 5 minutes

To modify who can view and edit a Page:

1. Select the Page you wish to edit the permissions of.
2. Click the lock icon at the top right of the page.
3. The **Restrictions** dropdown module appears.
 - a. **Note: Anyone can view and edit** refers to the Permissions of the Space itself. If a user does not have permissions in the Space, they will not be able to modify the page, even if they are given access to it.
4. Select **Anyone can view, only some can edit**.
 1. Type the name of a user you'd like to be able to edit.
 2. **Note:** Similar to the note above, "Everyone can view" only applies to users who have access to the Space, not everyone in Confluence.
5. Click the blue **Apply** button.

LAB 5

Jira Integration in Confluence

Exercise 14 - Creating a Jira Issue in Confluence

Estimated Time: 5 minutes

1. Highlight text on your Confluence Page
2. Choose the **Create Jira Issue** button that appears above the highlighted text.
3. Enter the **Project**, **Issue Type**, and **Description**. Your highlighted text will populate the **Summary** field automatically.
4. Click the **Create** button.
5. The issue will be created in Jira and added to your page. If your text is in a table, you'll have the option to create multiple issues using Text from the same column.

Exercise 15 - Displaying Issues from a Project in Confluence

Estimated Time: 5 minutes

To display a series of Issues in Confluence:

1. Edit your Confluence Page
2. Select the Jira Macro, either by using **/Jira** in the editor, or choosing **Insert → Jira** at the top of the Editor.
3. Type in the JQL Filter you previously created.
4. Click the Search button to populate the Macro.
5. Then click the **Insert** button.
 - a. **Note:** you can add single Jira Issues by pasting the link of the Jira Issue, or by clicking the Insert Link (Ctrl+K) Macro at the top of the Page and typing in the name of the Issue.

Helpful Links

[Jira Access Request Form](#)

[Atlassian Training Space](#)

[Atlassian University](#)

Constructing JQL Queries

All JQL queries consist of a **field**, an **operator**, and one or more **values** or **functions**. Complex queries can link JQL together with **keywords**.

Simple

```
project = Test
```

field operator value

Complex

```
project = Test AND assignee in (currentUser())
```

field operator value keyword field operator function

Fields

A Field in JQL is a word that represents a Jira field (or a custom field that has been defined in Jira).

| | | |
|------------------|-------------|--------------|
| Assignee | Epic Link | Resolved |
| Affected Version | Filter | Sprint |
| Attachments | Fix Version | Status |
| Comment | Issue Key | Summary |
| Component | Labels | Text |
| Created | Last Viewed | Time Spent |
| Creator | Priority | Voter |
| Description | Project | Watcher |
| Due | Reporter | Custom Field |

Operators

An Operator in JQL is one or more symbols or words that compare the value of a Field on its left with one or more values or functions on its right and returning the results.

| | |
|---------|------------|
| = | != |
| > | < |
| >= | <= |
| ~ | !*~ |
| in | not in |
| is | is not |
| was | was not |
| was in | was not in |
| changed | |

Functions

A Function in JQL appears as a word followed by parentheses, which may contain one or more explicit values or Jira fields.

A function performs a calculation on either specific Jira data, or the function's content in parentheses, then returns the results.

| <u>Time</u> | <u>People</u> | <u>Issue</u> |
|----------------------------|----------------|-----------------|
| startOfDay/Week/Month/Year | currentLogin() | issueHistory() |
| startOfEnd/Week/Month/Year | currentUser() | openSprints() |
| lastLogin() | membersOf() | watchedIssues() |
| now() | | myApproval() |
| | | myPending() |

Example Query

```
created > startOfWeek() and assignee = currentUser() and (status = Open or (status = Reopened and priority in (High, Highest)))
```