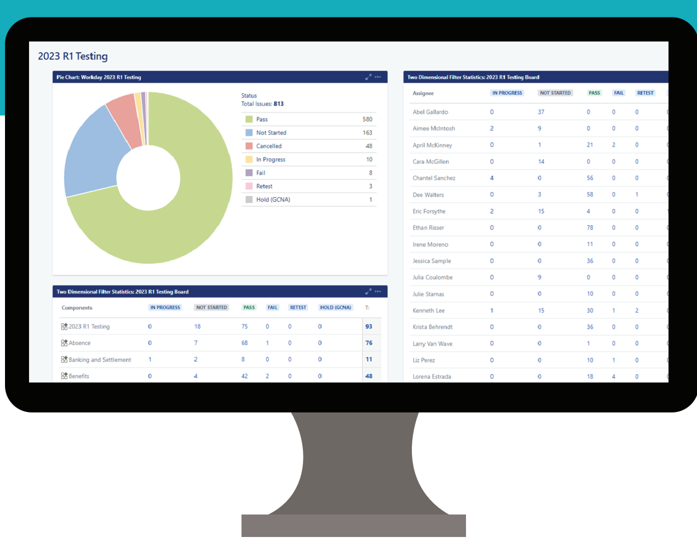
Jira User Guide

Goodwill

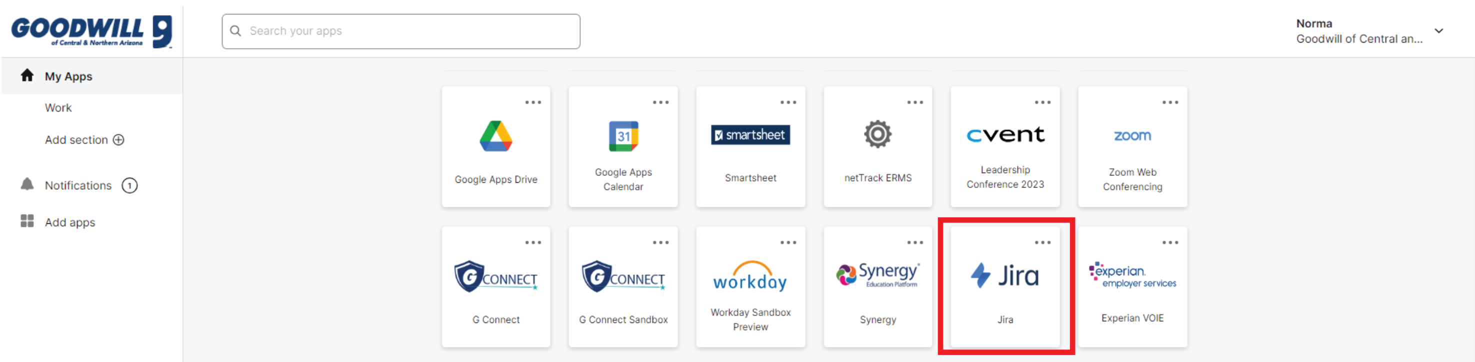


Jira

Accessing Jira

Jira is a project management platform designed to help teams manage their work, complete tasks, and test projects. This guide will provide an overview of the key features of Jira and help you get started with using the software effectively. The Jira platform is accessible from your Goodwill Okta page, which can be found by clicking on the link on the employee portal.

Sign in to **Okta** and scroll until you see the **Jira** icon.

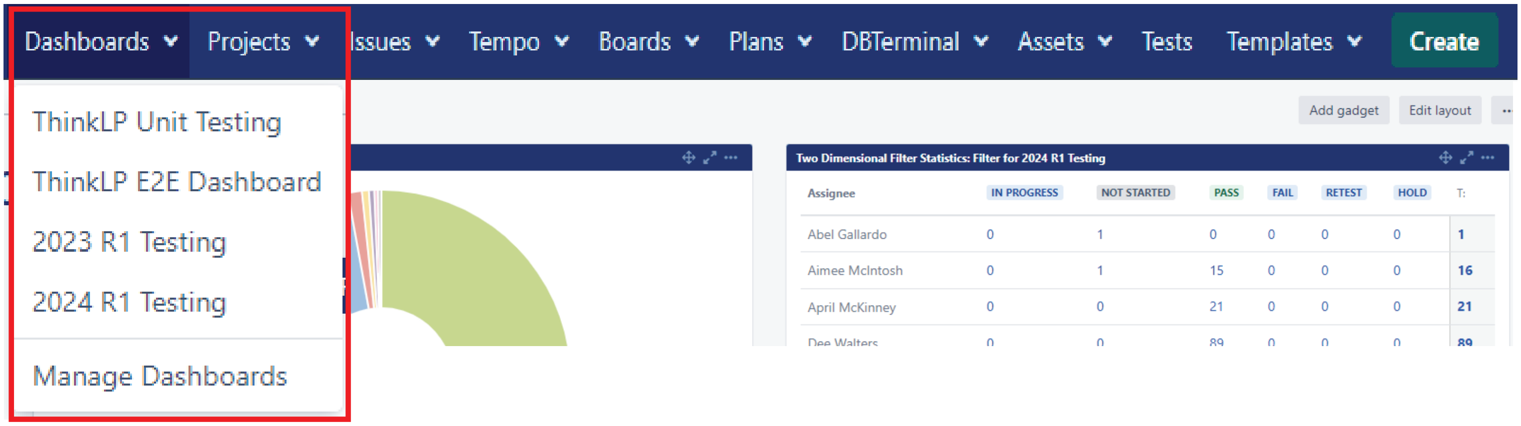


Note: If you are missing the Jira app, contact IT to have it added.

Understanding the Interface

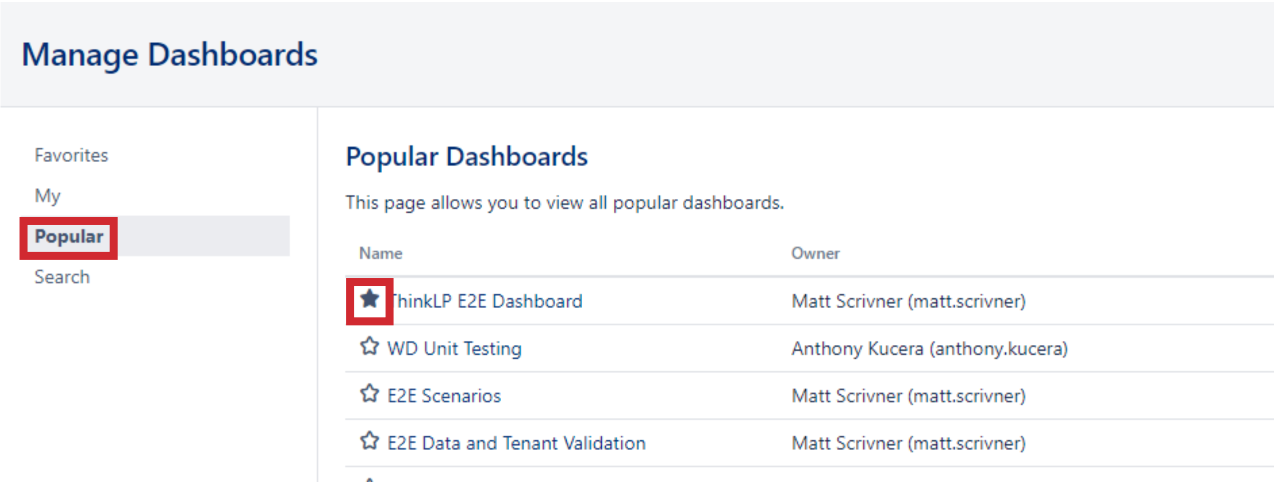
System Dashboard

The dashboard is the first thing you see when you log in to Jira. It provides an overview of your projects, issues, and activities. Click the **Dashboards** drop-down to see a list of your dashboards and the **Manage Dashboards** option.



Managing a Dashboard

Once a new dashboard is created, go to **Manage Dashboards** and click **Popular** to find the new dashboard. Click the star next to the new dashboard and it will appear in the Dashboards drop-down.



Note: If you have been assigned to test on a project and you do not see the dashboard, contact IT to have them assign the dashboard to you.

Dashboard Components

The following image provides explanations of the common components of a project dashboard.

Pie charts provide a breakdown of each status of testing.

The list on the left is a breakdown of the status types by project components.

The list on the right is a break-down of status types by the person to whom they are assigned.

Understanding the Interface cont.

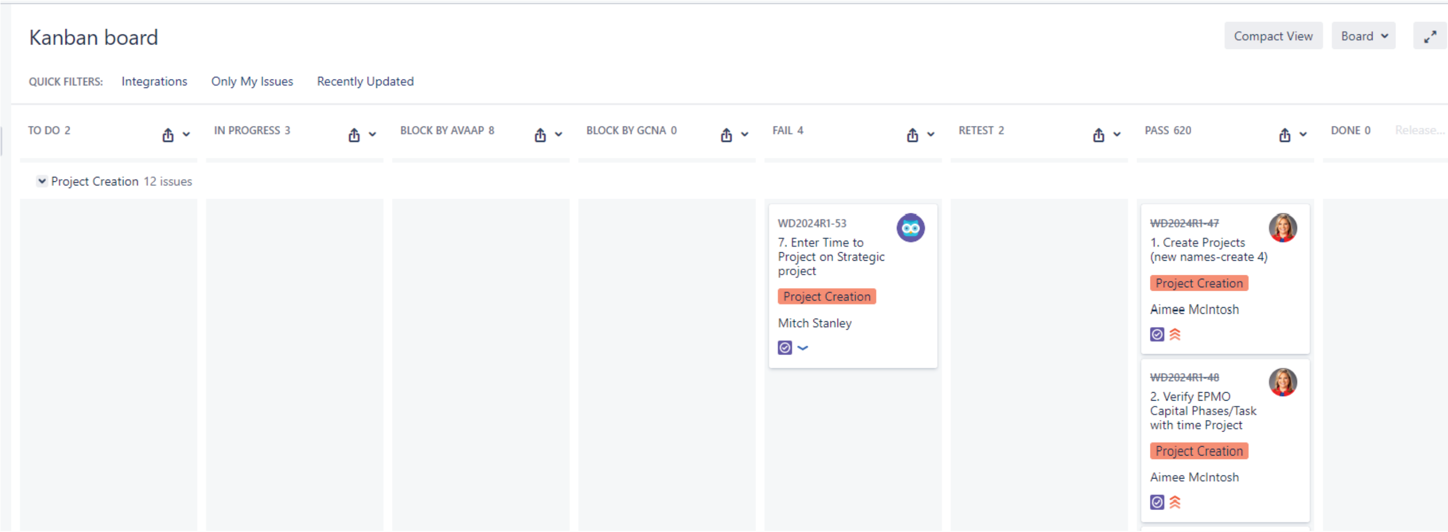
Using Boards

A board in Jira displays project data. Most testers use a board to see the tasks assigned to them. Click the link in the **TO DO** column, then the box with your name to start testing.

Kanban Boards

The Kanban format is an alternate view for boards. It is a card view of the issues you would see on the table on the right side of a dashboard.

All of the instructions given still apply, but the look of the board will be different. You move an issue by dragging and dropping it into the correct column based on whether it passed or failed. If it passes, you can move on to the next issue. If it fails, you'll follow the process to go into the issue, add comments and screenshots, and reassign to the person resolving the failure.



Projects

Projects are a collection of items organized to achieve a specific goal or set of goals. Access your projects by clicking on **Projects** in the navigation menu.

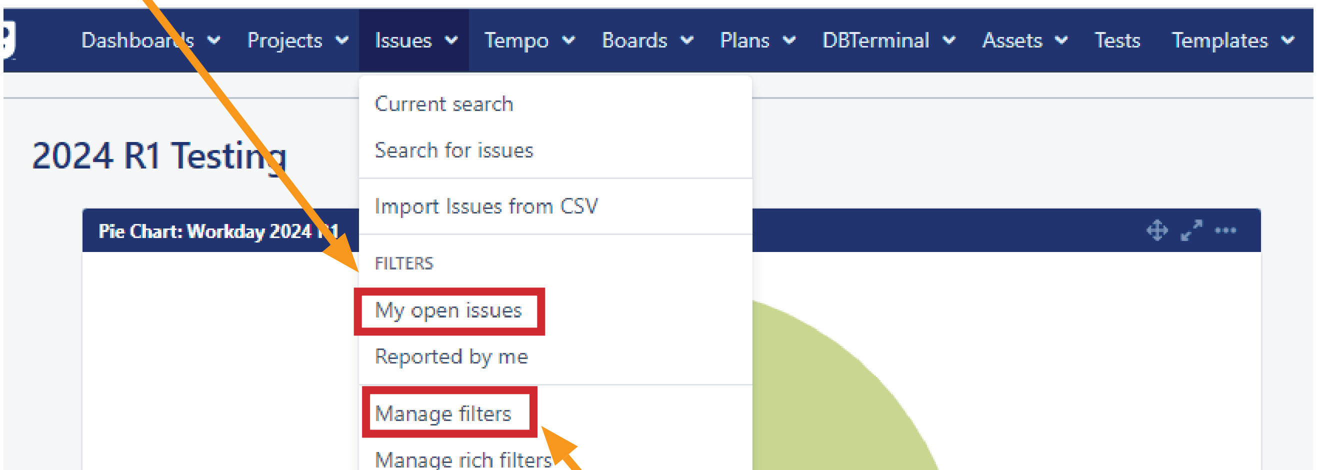
Issues and Tests

Issues are individual tasks, enhancements, bugs, or other pieces of work that need to be completed. Issues are also test cases used on projects to test software functionality. They describe the steps necessary to complete a task and the expected results we should see to know if the test case passes or fails. Create, view, edit, and track the progress of issues in your project.

Common Functions

My Open Issues

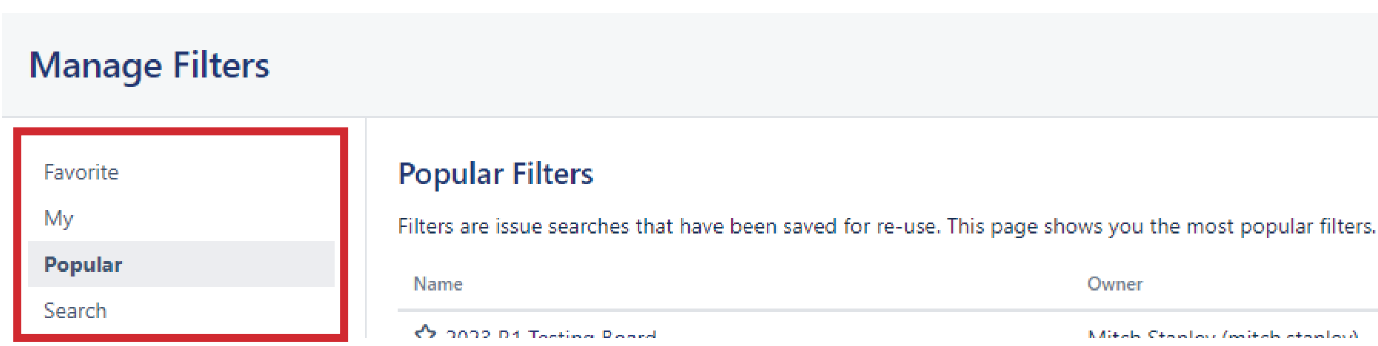
The My open issues section shows users a list of issues (like bugs, tasks, or stories) that are currently assigned to them. This helps in quickly identifying what needs attention and helps determine task priority. To get to My open issues, select the **Issues** drop-down menu, there you will find the **My open issues** option.



Filters

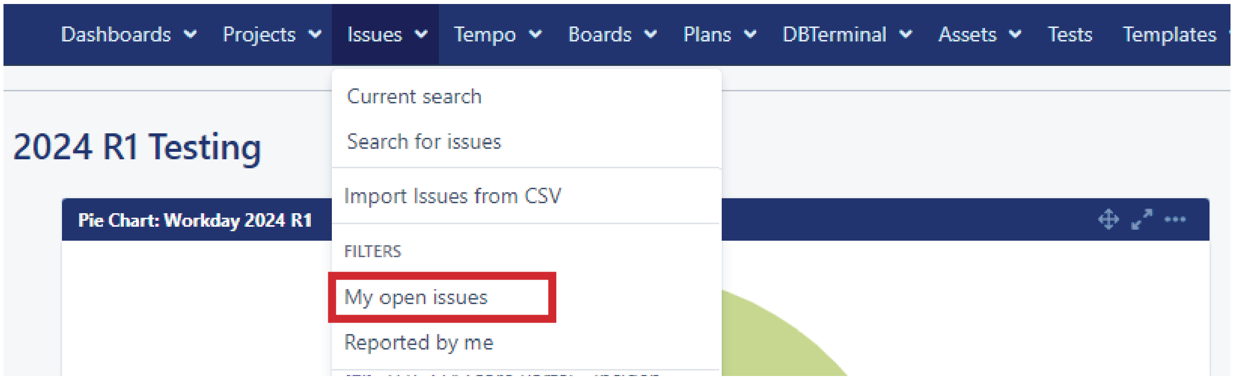
In the Items drop-down menu, you have the option to **Manage filters**. There, you will find the following options on the left menu:

- **Favorite:** Filters you have saved by clicking on the star by the name.
- **My:** Filters you own.
- **Popular:** The most popular filters, here you can click the star to save to your Favorite tab.
- **Search:** Allows you to search all filters that you can see.

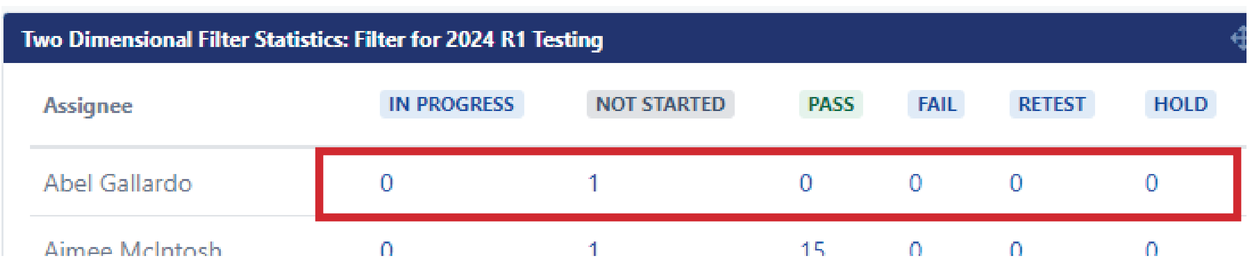


Viewing Issues

You can view issues by Selecting the **Issues** drop-down menu at the top of the page and select **My open issues**, this will show all unresolved issues assigned to you.

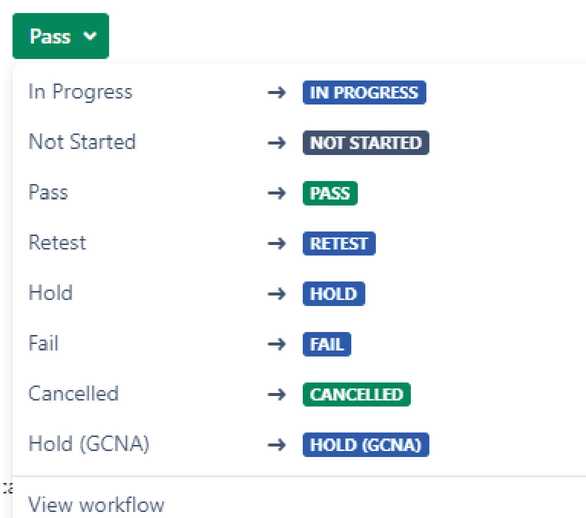


Another way to view issues assigned is to click any number found in a status column on your dashboard to view the issue.



Transitioning Issues

Transitioning an issue means moving it from one status to another. To transition an issue, click on the drop-down menu for the current status and select the new status for the issue. You also have an option to see the workflow for the project.

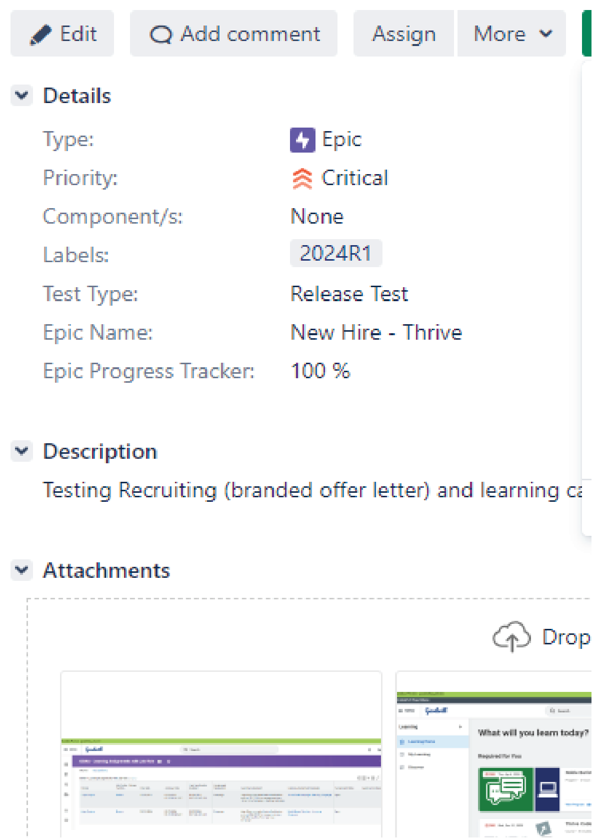


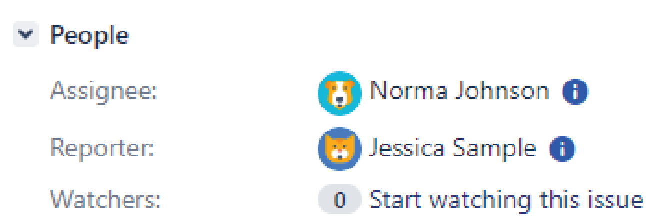
Working with Issues cont.

Key Fields on an Issue

There are several fields that need your attention when working on an assigned issue. These fields are:

- **Priority:** The urgency level of addressing an issue within a project.
- **Component:** Shows which sub-category of the project the issue belongs to.
- **Labels:** The ID number assigned to each specific issue and allows you to easily identify separate issues.
- **Description:** Gives information on what is being tested.
- **Attachments:** You can provide screenshots of the issue when there is a failure or a need to share more information.
- **Issue links:** Used within an Epic, or large topic, to show all of the smaller issues that are broken down under a larger issue. They will take you from the smaller issue or test to the larger topic the test is grouped in.
- **Assignee:** The person performing the test.
- **Reporter:** This person or team will create issues, provide details, and serve as the primary point of contact for the issue.
- **Watcher:** This person or team will receive notifications about changes to an issue and can follow the progress of issues without being directly responsible for its completion.



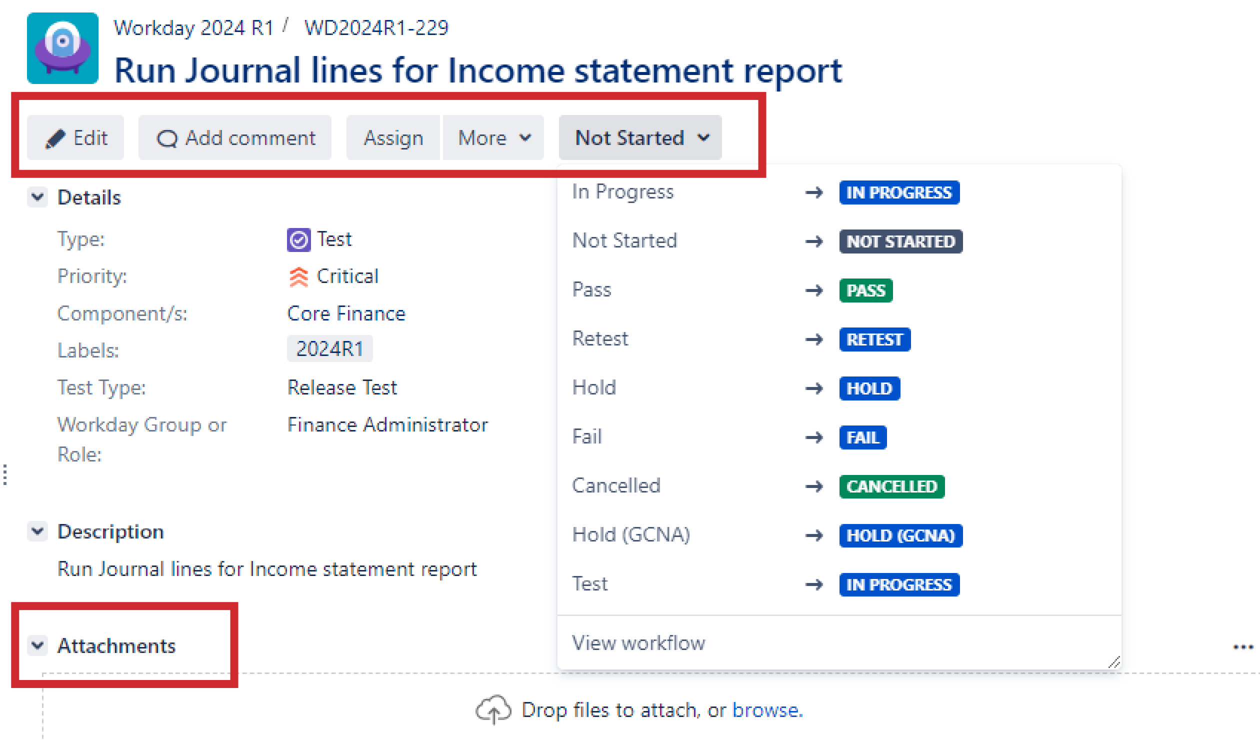


Working with Issues cont.

Editing Issues

To edit an issue, navigate to the issue then click on the **Edit** button. You can update the issue details, add comments, attach files, and log work. Editing an issue is necessary if you transition an issue to Failed.

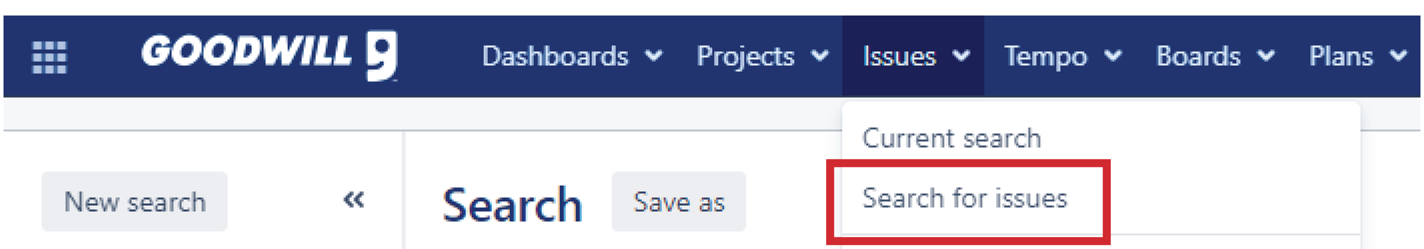
Add a comment to state the results of the failed test case, provide the steps you took when you encountered an error, and a screenshot of the error for whomever is reviewing the issue to resolve the defect. The issue will then be reassigned to the person responsible for fixing defects on the project. The more information included about the failed test case the easier it will be for the person responsible for fixing defects on the project.



Assigning a Group of Issues

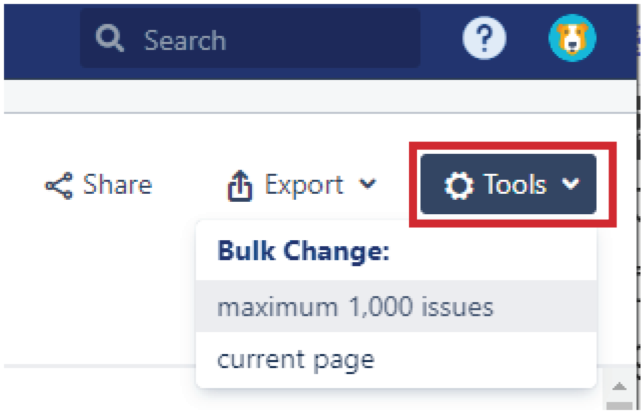
To assign a set of test scenarios without clicking on them individually:

Go to the **Issues** tab and select **Search for issues**. This will populate issues in all projects. You can filter them as needed to reach the desired group of issues.

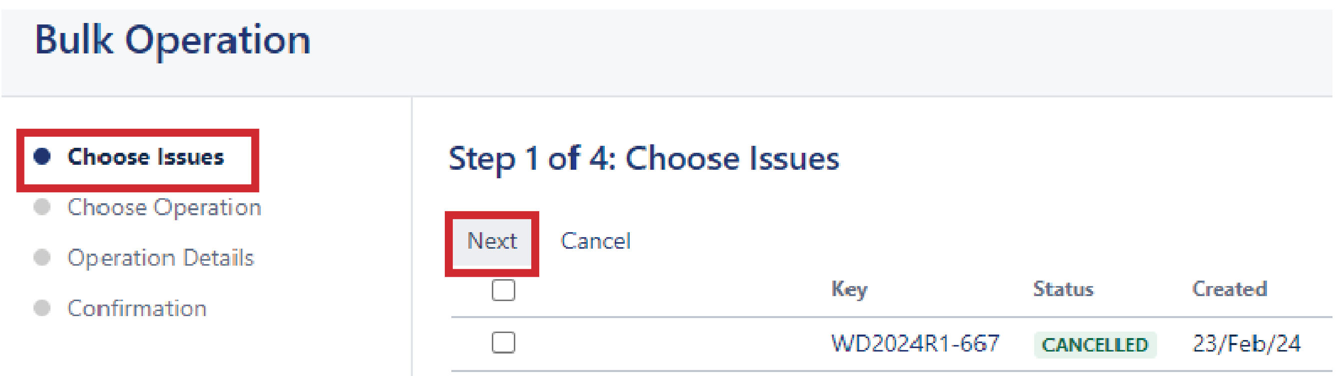


Assigning a Group of Issues cont.

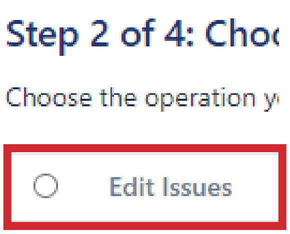
In the top right corner of the screen, click the drop-down menu for the **Tools** menu and click **current page**.



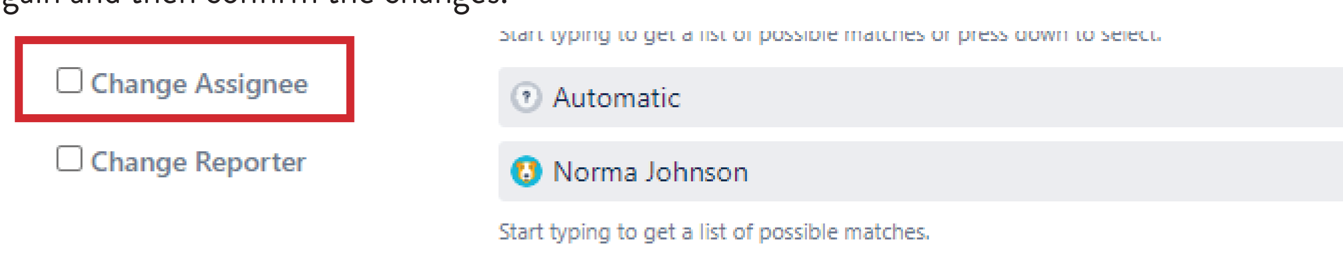
Select **Choose Issues** on the left menu, select the issues you want to reassign, and click **Next** to proceed to the editing options.



Select **Edit Issues** from the group and click **Next**.



Select **Change Assignee** in the left menu, and select the person to reassign the task to. Click **Next** again and then confirm the changes.



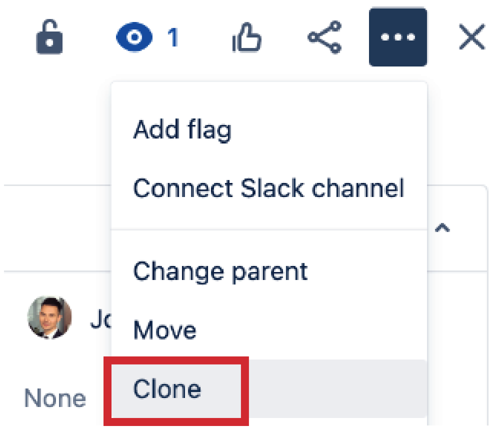
Working with Issues cont.

Cloning a Current Test Scenario

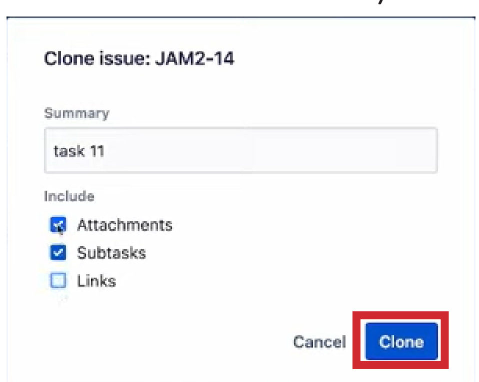
Note: To be able to clone a scenario, you must have the Create Issues status for the Jira project.

When you are testing, you will likely think of new scenarios. Instead of starting a new issue from scratch, you can copy or clone an existing issue/test scenario and edit fields to save time.

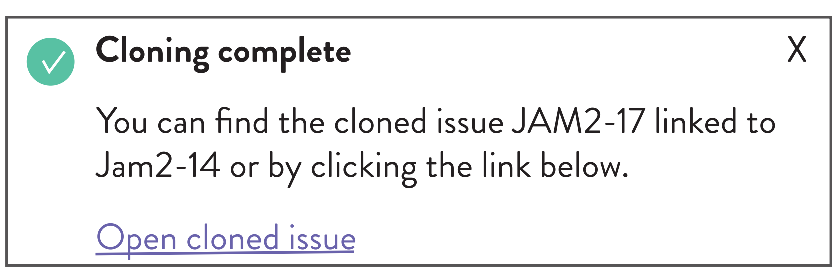
To clone an issue, start by opening the issue. Under the issue name, click on the **More** drop-down menu, this is the three dots in the upper right corner, select **Clone.**



When cloning, some information from the original issue isn't automatically cloned but can be included, such as attachments, subtasks, and links. Once you select the items to add, click **Clone.**



Click **Open cloned issue** in the pop-up to open the cloned issue.



You can edit the issue by clicking **Edit** at the top right, which allows you to adjust information in the desired fields. You can also change the assignee when editing the issue.

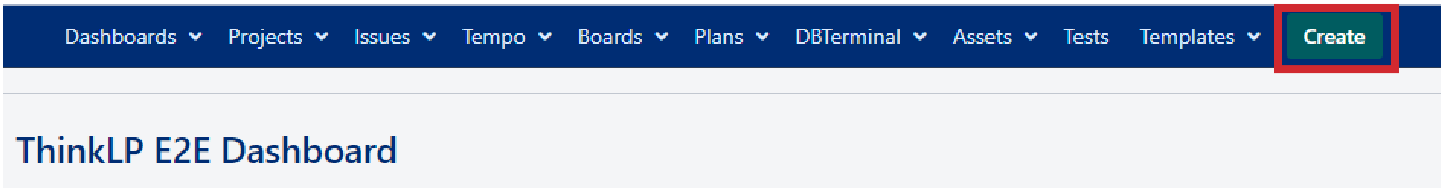
Working with Issues cont.

Creating Issues

Note: To create a new issue, you must have the Create Issues status for the Jira project.

Usually, test scenarios and issues are pre-loaded into a project, to build a new issue:

Click the **Create** button at the top of the screen.



A template will pop-up, all fields marked with an asterisk are required, including the following:

- **Issue Type:** A common type is test.
- **Epic Name:** This is a large subject that is broken down to a group of smaller tests or categories.
- **Reporter:** This role creates issues, provides details, and is the primary point of contact.
- **Component:** This shows which sub-category of the project the issue belongs to.
- **Priority:** The urgency level of addressing an issue within a project.
- **Epic Link:** This will be a link to the test category you can find in the scenarios.
- **Status:** A list of status options for the issue.
- **Test Type:** This is typically User Acceptace Testing (UAT), other types include Unit Testing or End-to-End (E2E).
- **Workday:** This is the role the person will test as, examples include Administrator or Manager.
- **Scenario ID and Name:** The assigned ID and Name for the project.
- **Task / Step:** The single task or step required to mark an item complete.
- **Sub Task:** There may be multiple tasks or steps. If so, the Task / Step column will be blank, and the various functions or steps will be listed here.
- **Scenario Description:** A description of what must be accomplished to complete the task.
- **Assigned To:** Originally, this was the person performing the test.
- **Watchers:** Receive notifications about changes to an issue and can follow the progress of issues without being directly responsible for its completion.

Using the Workflow

Workflow Status

As you complete your tasks or steps in an issue, use the drop-down menu on the screen to update the status. Jira sends automatic notifications to inform users about various events related to issues, such as when an issue is created, updated, commented on, transitioned to a different status, and more. Below is a list of status options.

Status Options

- **Not Started:** Most issues you will begin working on will have this status.
- **In Progress:** Indicates you have started the necessary tasks.
- **Pass:** Indicates that you successfully completed the scenario.
- **Fail:** The scenario was not successfully completed. If you mark a task or step as 'Fail' you must:
    - Edit the issue and add a comment including what steps you took in testing when you encountered the error to assist the person responsible for fixing the defect.
    - Add a screenshot of the error for whoever is reviewing the issue to resolve the defect.
    - Assign the issue to the person responsible for fixing defects in the project.
- **Hold:** Use hold when you are blocked from testing the issue. Add a comment explaining how you are blocked from continuing testing. A screenshot may help the person fixing the issue.
- **Cancel:** This indicates the issue no longer needs to be completed. A comment is required to explain the cancellation.
- **Retest:** If an item that previously failed has been corrected by the assignee, they will mark the item 'Retest' and assign it back to you.

Note: If you want someone else to review an issue, they must be an assignee. If you want someone, other than the Assignee, to be aware of your comment you can also mark @Name in the comments field.