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PHOENIX TS

Jira Fundamentals

Due to Covid-19 safety restrictions PhoenixTS will temporarily be unable to provide food to our students who attend class at our Training Center; however, our Break Areas are **currently open** where students will find a constant supply of Coffee, Tea and Water. Students may bring their own lunch and snacks to eat in our breakrooms or at their seat in the classroom or eat out at one of the many nearby restaurants.

Course Description

Phoenix TS' 1-day Jira Fundamentals course starts with a variety of recipes to help manage users and workflows. Participants will learn how to set up custom forms and capture important data with custom fields and screens. Next, they'll gain insights into the latest email capabilities, which will assist with everything from managing outgoing email rules to processing incoming emails for automated issue creation. Later, they'll be guided through running scripts to automate tasks, getting easy access to logs, and even working with tools to troubleshoot problems. The course will also ensure participants understand how to integrate Jira with Slack, set up SSO with Google, and delegate administrator permissions. Finally, participants will cover Jira Service Desk to set up and customize their own support portal, work with internal teams to solve problems, and achieve optimized services with Service Level Agreement (SLA).

Course Completion

At the conclusion of this course, participants will be able to do the following:

- Understand Jira's data hierarchy and how to design and work with projects in Jira
- Use Jira for agile software projects, business process management, customer service support, and more
- Understand issues and work with them
- Design both system and custom fields to behave differently under different contexts
- Create and design your own screens and apply them to different project and issue types
- Gain an understanding of the workflow and its various components
- Set up both incoming and outgoing mail servers to work with e-mails



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Schedule

Course Outline

Module 1

- Jira Architecture
- Understanding Project Types
- Jira Permissions

- Project User Interfaces
- Project Browser
- The Project Administration Interface
- Importing Data into Jira

Module 2

- Scrum and Kanban
- Running a Project with Scrum
- Running a Project with Kanban
- Configuring Agile Boards
- Creating New Agile Board for Projects

- Including Multiple Projects on Board

Module 3

- Understanding Issues
- Working with Issues
- Issue Linking

- Issue Cloning
- Time Tracking
- Issues and Comments
- Attachments
- Issue Types and Subtasks

- Subtasks
- Issue Type Schemes
- Issue Priorities

Module 4

- Built-In Fields

- Custom Fields
- Custom Field Types



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- Searches
- Custom Field Context
- Managing Custom Fields

- Field Configuration
- Screens
- Field Configuration Scheme

Module 5

- JIRA and Screens

- Working with Screens
- Using Screen Tabs
- Working with Screen Schemes
- Issue Type Screen Scheme
- Associating an Issue Type Screen Scheme with a Project

Module 6

- Mapping Business Processes
- Understanding Workflows
- Managing Workflows
- Using the Workflow Designer

- Authoring a Workflow
- Updating an Existing Workflow
- Workflow Schemes
- Applying a Workflow Scheme to Projects
- Extending Workflow with Workflow Add-Ons

Module 7

- Jira and Email
- Events
- Notifications
- The Notification Scheme

- Troubleshooting Notifications
- Incoming Emails

Module 8

- Groups
- Project Roles

- Jira Permissions Hierarchy
- Project Permissions
- Permission Schemes



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- Issue Security
- Issue Security Scheme
- Troubleshooting Permissions
- Workflow Security

Module 9

- Search Interface and Opinions in Jira
- Issue Navigator
- Basic Search
- Advanced Search with JQL
- Quick Search
- Working with Search Results
- Filters
- Reports
- Dashboards
- Gadgets

Module 10

- The Basic Concepts
- Adding Global Spaces
- Adding Pages
- The Confluence Editor
- Adding Content
- Working with Content History
- Importing Content
- Exporting Content

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