

# **Jira Project Management**

1 — Last update: 30 November 2022

United Nations - DOS

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# 1. Issue Overview

## Main Window – Project Tab


1	<b>Initiative</b>	Clicking the <i>Initiative</i> name generates a query showing all issues for this <i>Initiative</i>
2	<b>Status Workflow</b>	Status options available based on <i>Issue Type</i> and <i>Current Status</i>
3	<b>Dates</b>	<b>Due Date</b> – Date work was requested to be delivered <b>Work Start Date</b> – Date work was initiated <b>Work Completed Date</b> – Date work was delivered

The screenshot displays the Jira Project Management interface for the project 'Inspira iManual Onboarding'. The interface is divided into several sections:







- Project Tab:** Contains fields for 'Epic Name', 'Activity Type', 'Initiative', 'Section Name', and 'Functional Area'. The 'Initiative' field is highlighted with a red box and labeled '1'.
- Status:** A dropdown menu is highlighted with a red box and labeled '2', showing options like 'Blocked' and 'Return to Implementation'.
- Dates:** A section on the right side of the interface is highlighted with a red box and labeled '3', containing fields for 'Due', 'Created', 'Updated', 'Work Start Date', 'Work Completed', and 'Date'.
- Sub-Tasks:** A list of sub-tasks is shown at the bottom, including 'About this Guide' and 'How to use this guide'.


## Main Window – Reporting Tab


<b>Reports</b>	Entries in this field are used to include the item in one or more reports. You can add additional report tags to the list, but do not remove existing tags, unless you created it.
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 CDOTSPortfolio1 / CDOTSPORT1-374

## Inspira iManual Onboarding



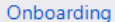
 Edit  Comment  Assign  More  Blocked  Return to Implementation

 Details


Type:  Epic

Priority:  Critical

Affects Version/s: None


Labels:   


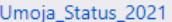

Environment: In Progress

Status:  (View Workflow)

Resolution: Not Resolved

Fix Version/s: None

Project 

Reports:   

Last modified: 22 April 2022

## 2. Issue Type Hierarchy

### Issue Type Hierarchy

**Epic** (course, job aid, i.e., something that needs to be reported on)

**Story** (unit of content under the epic)

**Subtask** (specific activity to accomplish unit of content)

**Task** (administrative/technical unit of work)

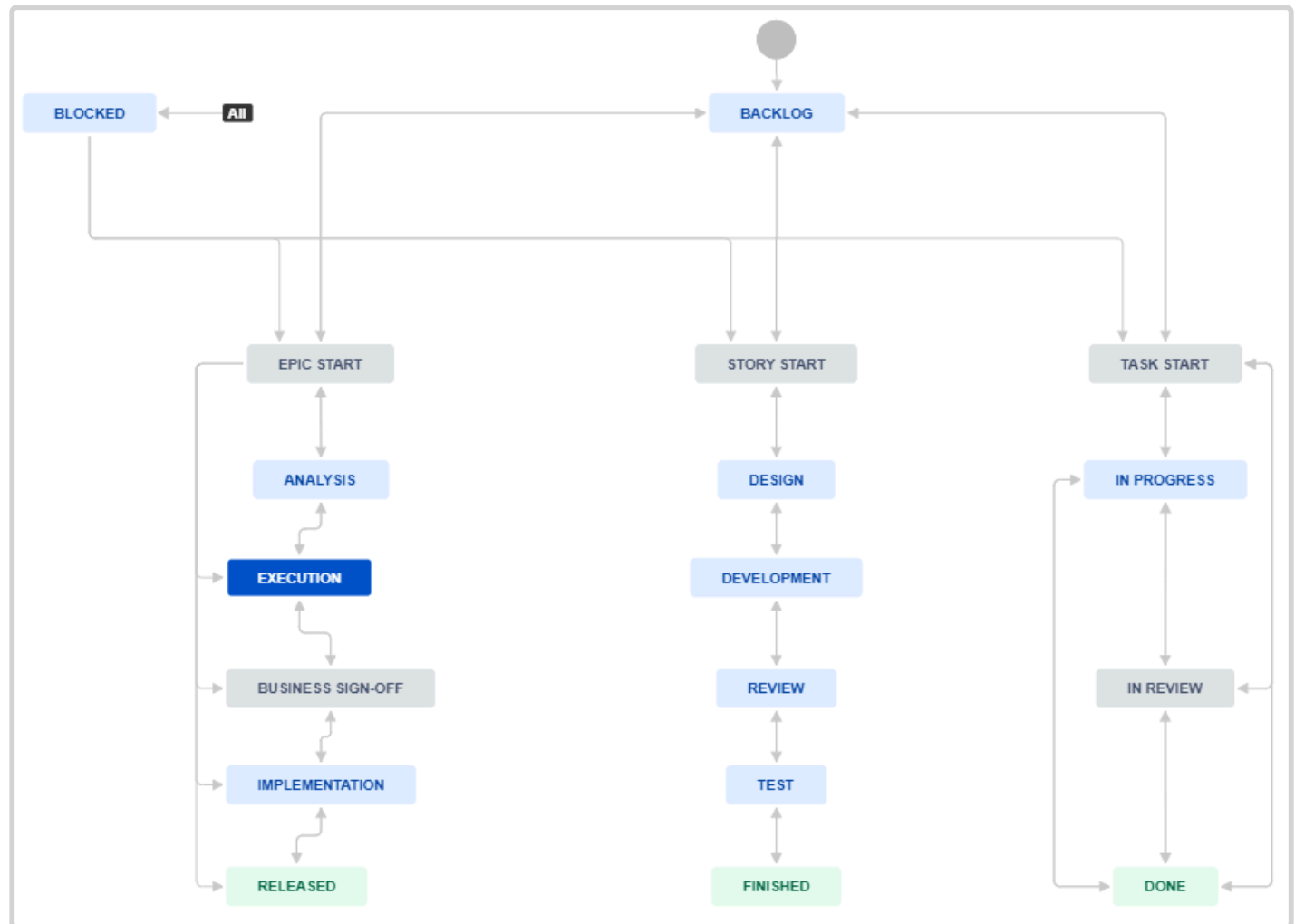
**Subtask** (specific activity to accomplish unit of work)

Issue Type	Status	Meaning
Epic	Epic Start	Course/Manual/etc is ready to work on and can be assigned as appropriate
	Analysis	Content is being reviewed/researched to determine best approach/structure for materials
	Execution	Content is being designed, created, or is in review
	Business Sign-Off	Final approval review by Business Sponsor
	Implementation	Course/Manual/etc is being tested in delivery environment
	Released	Course/Manual/etc has been released for use in production environment
Story	Story Start	Lesson/Chapter/etc is ready to work on and can be assigned as appropriate
	Design	Design for Lesson/Chapter/etc content is underway
	Development	Lesson/Chapter/etc content is being created
	Review	Lesson/Chapter/etc content is being reviewed either internally or by SME
	Test	Lesson/Chapter/etc is being tested in production environment
	Finished	Lesson/Chapter/etc is approved and ready for go-live in production
Task/Sub-Task	Task Start	Task/Subtask is ready to work on and can be assigned as appropriate
	In Progress	Work on Task/Subtask is under way
	Done	Work on Task/Subtask is completed

*Last modified: 12 January 2022*

## 3. Issue Workflow

### Issue Workflow



### Issue Workflow Table

	Example	Statuses			
Epic	Contracts Administration	Start Epic, Analysis	Execution, Business Sign-Off	Implementation	Released
Story	Lesson 1: Renewal of Fixed Term Appt		Start Story, Design, Development, Review	Testing	Finished
Sub-Task	Section 1: Overview	Start Task, In Progress			Done
Task	Establish LMS Module	Start Task, In Progress			Done

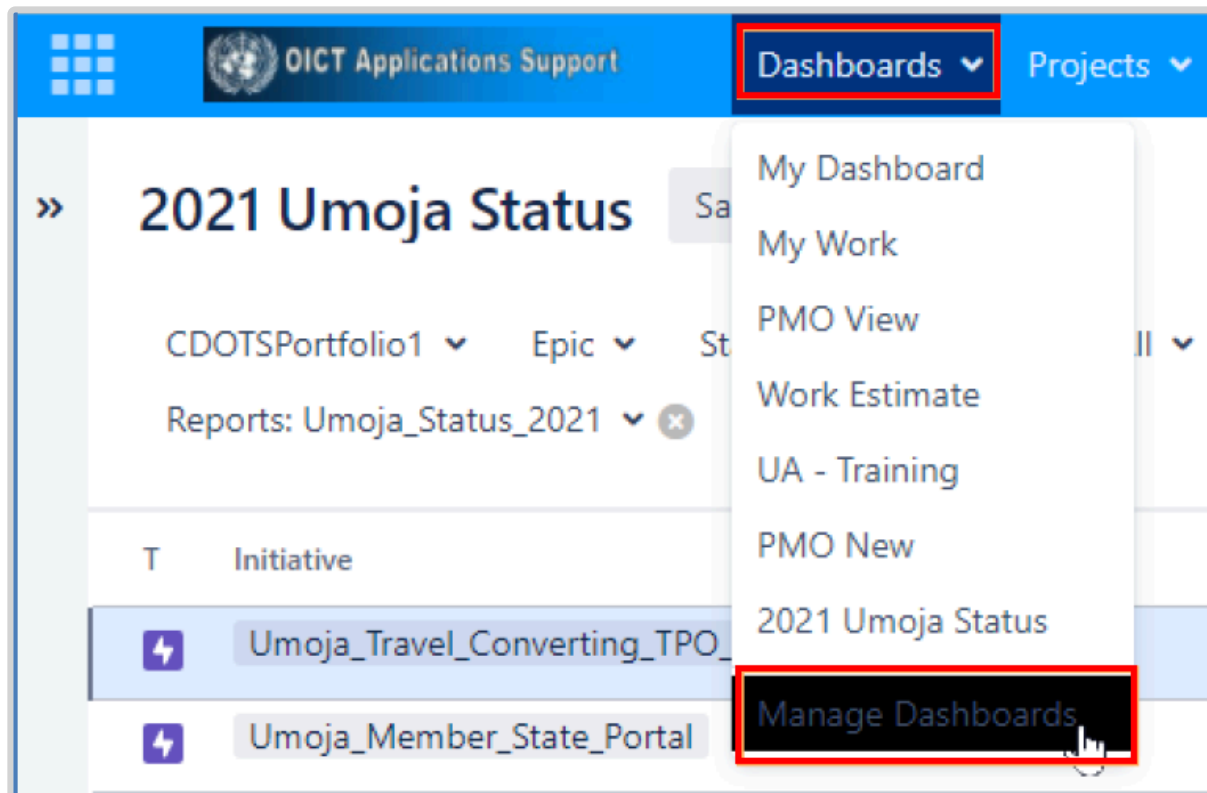
*Last modified: 14 January 2022*

## 4. Add a Shared Dashboard or Filter to Favorites

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You can access shared dashboards and filters and favorite them for easy future use.

1. From the Dashboard menu, select Manage Dashboards. From the Issues menu, select Manage Filters.



2. From the Manage Dashboards/Filters screen, select Search, enter name of the sharer (e.g., John Haller), then click the Search button. Locate the Dashboard or Filter in the list and click the star to favorite it.



## Manage Dashboards

Favorites  
My  
Popular  
**Search**

### Search Dashboards

This page allows you to search for all visible dashboards.

Search

Searches in the dashboard's name and description.

Owner

Start typing to get a list of possible matches.

Shared with

Name	Owner	Shared with
★ 2021 Umoja Status	John Haller (JHALLER)	• <b>Project:</b> CDOTSPortfolio1 (VIEW)
★ My Dashboard	John Haller (JHALLER)	• Private dashboard
★ My Work	John Haller (JHALLER)	• Private dashboard
★ PMO New	John Haller (JHALLER)	• Private dashboard
★ PMO View	John Haller (JHALLER)	• Private dashboard
★ Work Estimate	John Haller (JHALLER)	• Private dashboard

3. The Dashboard will now appear in your Dashboard menu list, or if a filter, will appear in the Issues menu list.



You may see Dashboards/Filters marked as Private. You cannot save these to your favorites, only those marked Shared with Project.

*Last modified: 29 July 2022*

## 5. Time Accounting

These are the maximum number of hours that can be entered per person for each month. For Staff Members, hours are based on [ST/AI/2019/2](#). A tool for calculating time can be found [here](#).

	Maximum Working Days in Month (Count of Weekdays in Month - UN Holidays)											
	January	February	March	April	May	June	July	August	September	October	November	December
	20	20	23	20	20	22	19	23	21	21	21	20
Max for SM	140	140	161	140	140	154	133	161	157.5	157.5	157.5	140
Max for Consultant	160	160	184	160	160	176	152	184	168	168	168	160

If you prefer to think of time spent as percentages, you can use this table for easy conversions.

1. Enter the number of days worked for which you are entering time. This can be for the entire month, taken from the table above, or some other number of days, e.g. 5 for a week, 1 for a day, or the actual number of days worked in a month (month max – days not worked, e.g., because of AL or Sick Leave).

Days Worked:	20		
	Staff Members		Consultants
Percent Time	Hours based on Standard GA Day	Hours Based on Standard Non-GA Day	Hours Based on 8 Hour Day
100%	150.00	140.00	160.00
75%	112.50	105.00	120.00
50%	75.00	70.00	80.00
25%	37.50	35.00	40.00
10%	15.00	14.00	16.00
5%	7.50	7.00	8.00
4%	6.00	5.60	6.40
3%	4.50	4.20	4.80
2%	3.00	2.80	3.20
1%	1.50	1.40	1.60

*Last modified: 17 January 2022*

## 5.1. Entering Time

For Jira time reporting to work best, please enter your time on the highest-level issue to which the work belongs. In most cases, this will be an Epic. In a smaller number of cases, this will be a Task.


To enter time from the [2022 Project Report](#),


1. Locate the issue and click the ellipsis at the far right of the row.
2. From the menu, select Log Work.

The screenshot shows the '2022 Project Report' interface. It features a table with columns for issue key, summary, assignee, status, and dates. The row for 'Umoja iManual Onboarding' is highlighted. A red box highlights the ellipsis icon at the far right of this row. A second red box highlights the 'Log work' option in the dropdown menu that appears when the ellipsis is clicked.

3. In the Log Work window, enter the time as Weeks (#w), Days (#d), or Hours(#h).  
1w = 40 hours, 1d = 8 hours
4. Make sure an appropriate date is selected. At a minimum, select any day in the month for which you are entering time. Reporting will sum time on a monthly basis.
5. Click Log to save the entry.

Log Work: CDOTSPORT1-356

**3** Time Spent\*  (eg. 3w 4d 12h)   
An estimate of how much time you have spent working.

Date Started\*   **4**


Remaining Estimate ☒ Adjust automatically  
the estimate will be reduced by the amount of work done, but never below 0.


☐ Leave estimate unset

☐ Set to  (eg. 3w 4d 12h)

☐ Reduce by  (eg. 3w 4d 12h)

Work Description

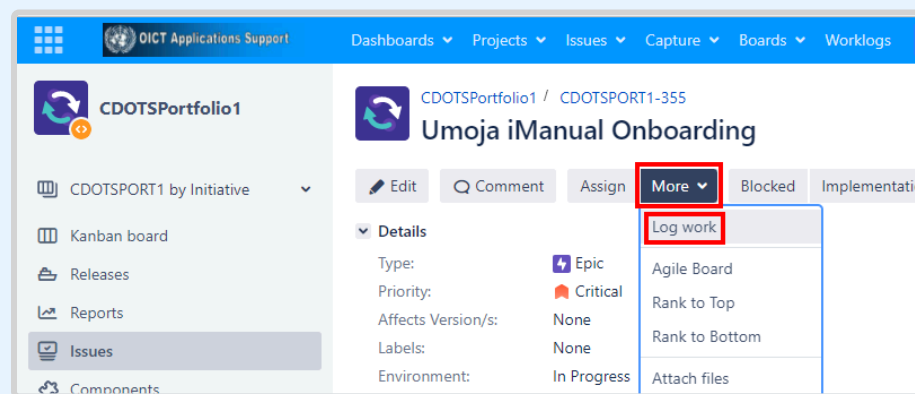
 Viewable by All Users

 [Find more time-tracking apps...](#)

**5**



You can also enter time when viewing an issue. From the More menu, select Log Work.



Last modified: 14 February 2022

## 5.2. Viewing Time Entries

To view time entries,

1. Click here to access the [Default Worklogs](#)
2. To display only your time entries, enter your name in the *User or Group field*.
3. You can change the displayed date range. Click on one of the dates.

The screenshot shows the Jira Worklogs interface. The top navigation bar includes 'Dashboards', 'Projects', 'Issues', 'Capture', 'Boards', 'Worklogs' (highlighted), and 'Create'. Below the navigation bar, the 'Worklogs' section is active, showing a table of time entries for 'John Haller' from '01/01/2022' to '01/31/2022'. The table is filtered by 'User or Group' (John Haller) and 'Date range' (01/01/2022 to 01/31/2022). The table has columns for 'User', 'Initiative', 'Epic', 'Total', and 'January 2022'. The data shows three entries: 'Umoja\_iManual' (0.38d), 'Umoja\_HR\_Partner\_eCertification\_Progrs' (0.25d), and 'Ad\_Hoc\_Project' (1d). The total time logged is 1.63d.

User	Initiative	Epic	Total	January 2022
John Haller	Umoja_iManual	CDOTSPORT1-355: Umoja iManual ...	0.38d	0.38d
John Haller	Umoja_HR_Partner_eCertification_Progrs	CDOTSPORT1-1012: Umoja HRPeC ...	0.25d	0.25d
John Haller	Ad_Hoc_Project	No epic	1d	1d
Total			Total	1.63d

4. You can then either use the calendar control to select new *To* and *From* dates or select one of several predefined time periods by clicking the desired time period button.

Date range

< 01/01/2022 → 01/31/2022 >

Secondary Grouping

← January 2022

Mo	Tu	We	Th	Fr	Sa	Su
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February 2022 →

Mo	Tu	We	Th	Fr	Sa	Su
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Current week

Current month

Current year

Today

Previous week

Previous month

Previous 3 months

Current quarter

Previous quarter

Last modified: 13 January 2022

## 5.3. Editing Time Entries

To edit time entries from the Worklogs screen,

1. Click a summary level value to see detail, then from the list of issues that make up that summary number, click the individual entry you want to change.

The screenshot shows the Jira Worklogs interface. At the top, there are filters for 'Project or Filter' (CDOTSPORT1), 'User or Group' (John Haller), and 'Date range' (01/01/2022 to 01/31/2022). Below these are options for 'Period grouping' (Month), 'Categorize by' (User), 'Group by' (Initiative), and 'Secondary Grouping' (Epic). A 'View Report' button and a 'Table' view selector are also present.

User	Initiative	Epic	Total	January 2022
John Haller	Umoja_iManual	CDOTSPORT1-355: Umoja iManual ...	0.38d	0.38d
	Umoja_HR_Partner_eCertification_Progr...	CDOTSPORT1-1...		
	Ad_Hoc_Project	No epic		
	<b>Total</b>			

A modal window is open showing the details for issue CDOTSPORT1-355. It lists two work log entries:

Issue	Work log	Original estimate
CDOTSPORT1-355: Umoja iManual Onb...	0.25d	
CDOTSPORT1-1067: Revise Images	0.13d	

2. You are taken to the issue screen, in the Work Log Activity tab, with the specific time entry highlighted.
3. Click the Pencil icon to change the value, or the Trashcan icon to delete the entry.



Issues in Epic

CDOTSPORT1-1067 Revise Images ☒ BACKLOG John Haller

Activity

All Comments **Work Log** History Activity Transitions ↑

John Haller logged work - 14/Jul/21 3:18 PM

Time Spent: 2 weeks  
<No comment>

John Haller logged work - 29/Oct/21 8:43 AM

Time Spent: 2 weeks  
<No comment>

John Haller logged work - 17/Nov/21 8:29 AM

Time Spent: 2 weeks  
<No comment>

John Haller logged work - 13/Jan/22 10:18 AM

Time Spent: 1 hour  
<No comment>

John Haller logged work - 13/Jan/22 10:23 AM

Time Spent: 1 hour  
<No comment>

Last modified: 13 January 2022

## 6. Power BI Reporting

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Power BI is used to create various reports from the data captured in Jira.

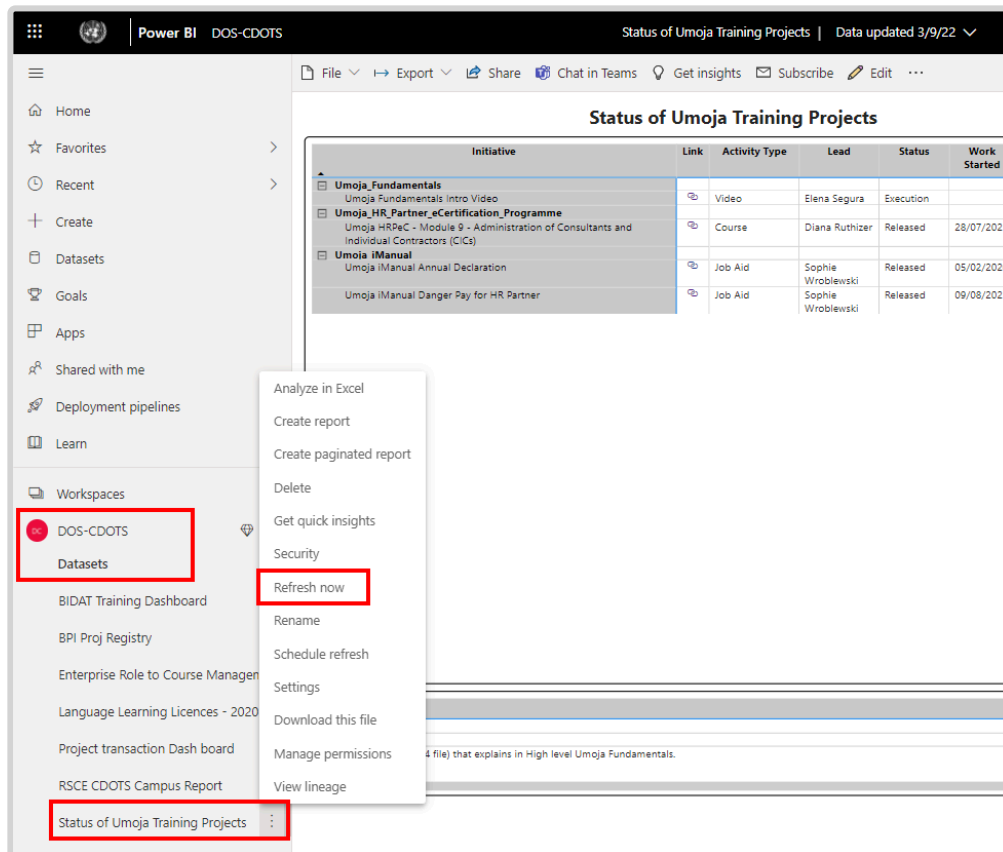
The report can be found [here](#).

*Last modified: 10 March 2022*

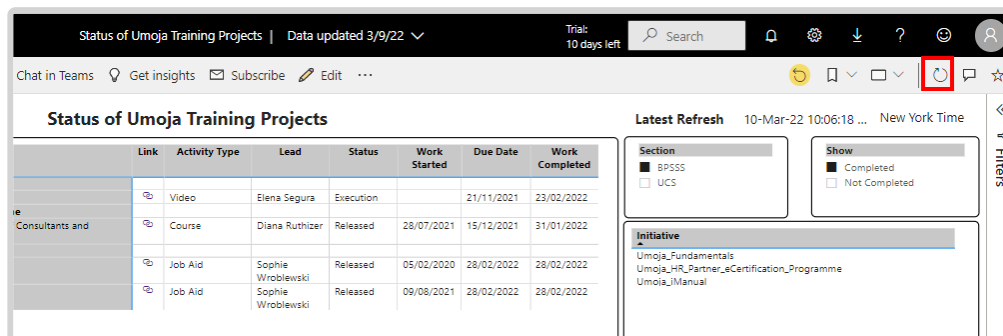
## 6.1. Refreshing Data

The Power BI report can be refreshed to provide current data.

1. Scroll to locate the *Status of Umoja Projects* Data Set, then expand the ellipsis menu and click Refresh Now.



2. Once the Data Set Refresh has completed, usually a matter of 1 to 2 seconds, click the Refresh Visuals icon.



Last modified: 10 March 2022