What NOT to DO: Atlassian Best Practices

Workbook

Praecipio Consulting

Introduction

You will be working in Skytap with your own virtual machine. The environment is unique to you and changes you make will not impact changes made by other users.
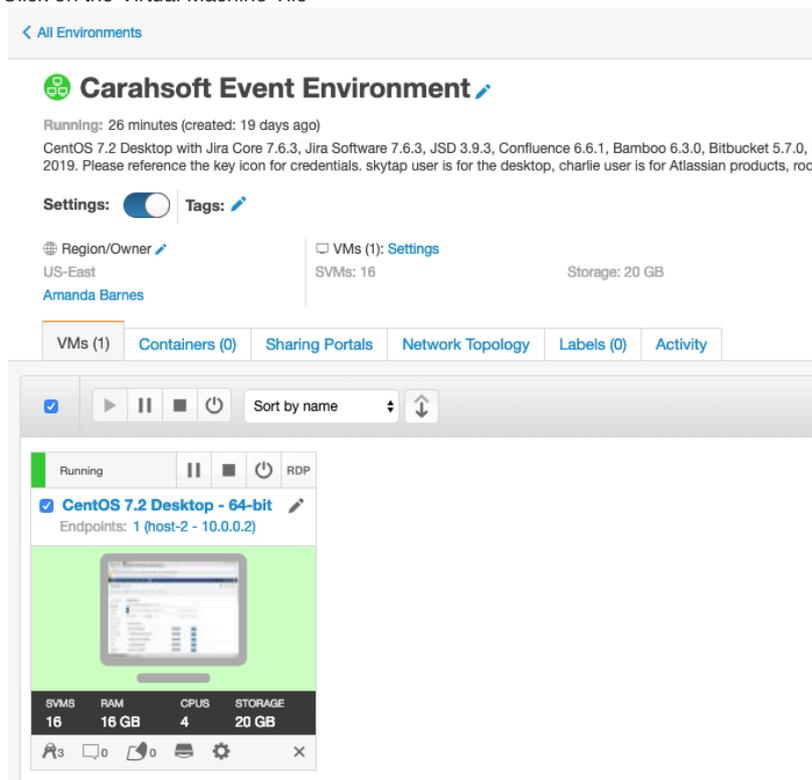
- Browser Recommendation: Please use Chrome on the provided laptops.

Log Into Skytap

1. Go to the unique URL provided
2. Enter the password
   GoldenEgret
3. Click the Play button
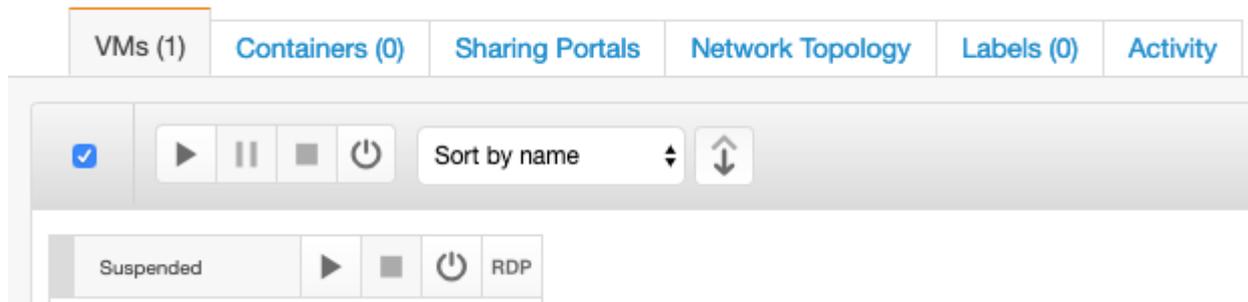
4. Click on the Virtual Machine Tile

This opens the Machine in a different tab.

Credentials

The credentials for JIRA are stored in Skytap for your convenience under the Keys icon in the Skytap controls. You will use the different available users to make changes to the applications.

Lab 2.0 - Governance

In this exercise, you are going to take the requirements from a Project Manager and add a user (Becky Sanders) to the system. You will also validate the permissions of the end user as compared to the permissions of you, the JIRA Administrator. Remember, the credentials for Charlie will be stored in the keys section of Skytap. If you forget Charlie's password, simply click in the keys and insert password.

Exercise 1 - Add a User to a Group

As an administrator of Jira, you will need to fulfill a new request. Thinking back to the presentation, a project manager is requesting access for a new developer.
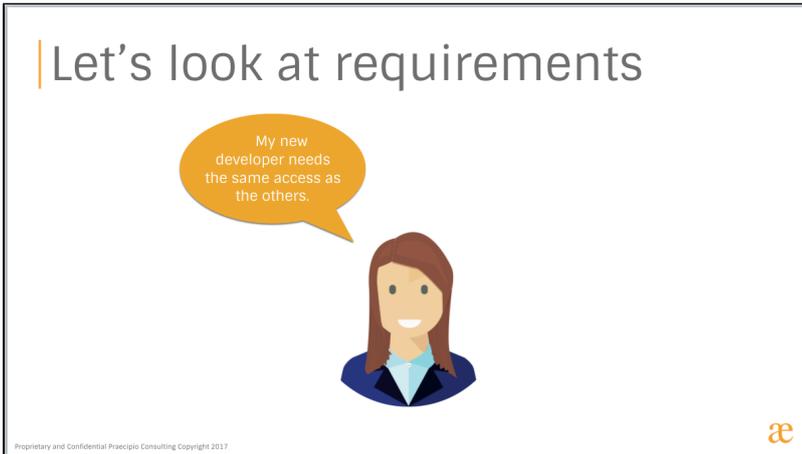

The developer needs the "same access as the others." In this case, we have no additional information. We'll revisit why this is important in Exercise 2.

1. In the Login Screen for Jira, use the credentials for Charlie by clicking on Insert next to both the Username and Password.
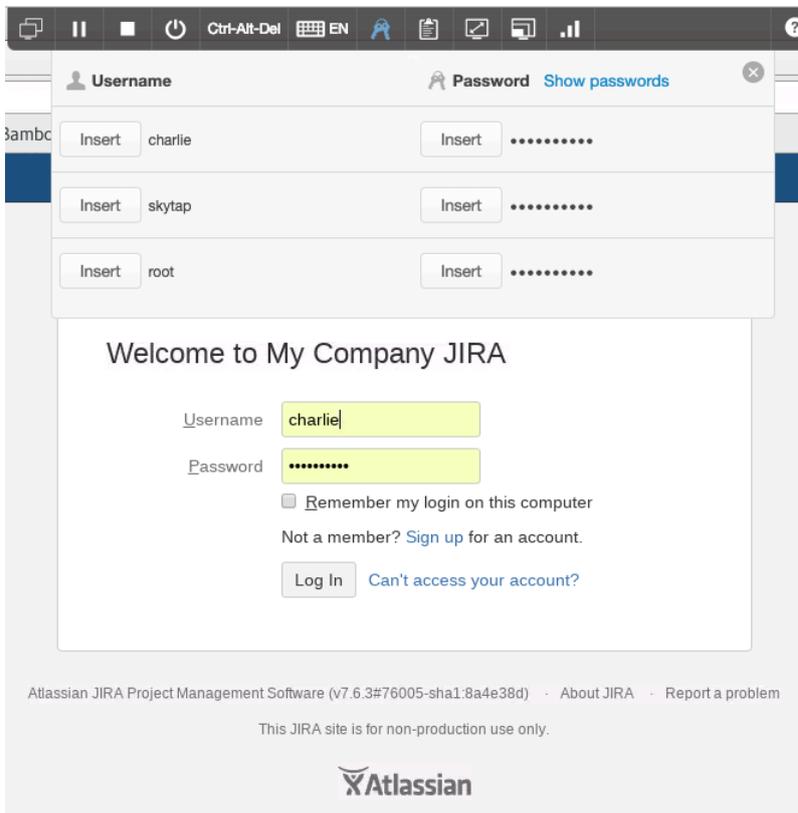
2. Click **Log In** or hit Enter.
3. You should now see a dashboard called *PM Overview*
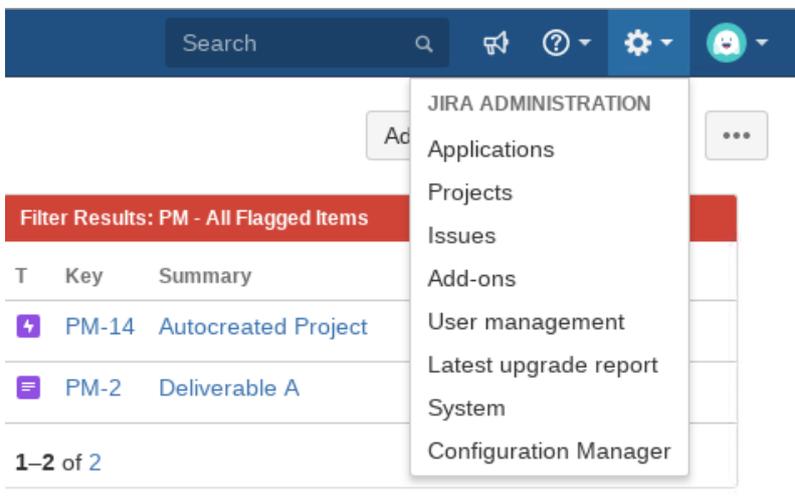4. In the Global header, click *Projects* and select *Software*
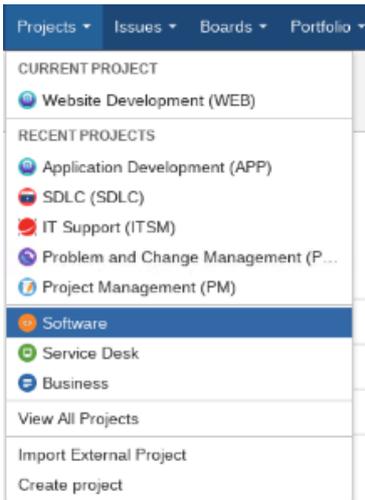
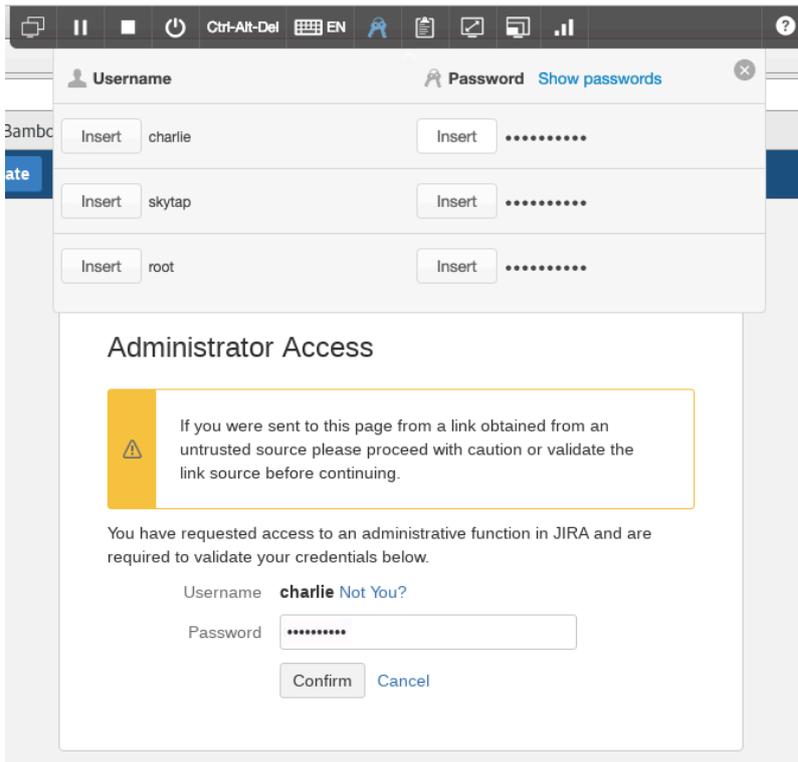> Question: How Many JIRA Projects do you see in the list?
>
> Answer: 3.

5. In the upper right hand corner, you will see a Cog Icon next to the avatar of a ghost. This is the JIRA Administration menu.
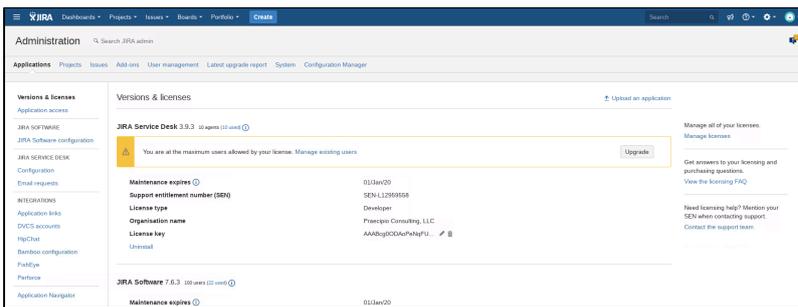
> Because you logged in as Charlie, an Administrator, the cog icon is visible and the menu is available.

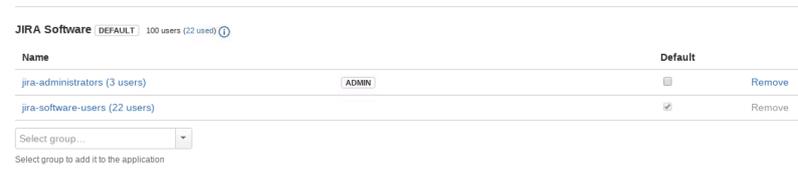6. Navigate to Applications and reenter the credentials for Charlie.

7. You will end up at the Versions and Licenses Menu

Users can have access to JIRA Core, JIRA Software, or JIRA Service Desk or all three.

8. Click on **Application Access** on the left hand side
9. Scroll down until you can see the information in JIRA Software

The groups visible are default groups provided by Atlassian. These are groups that provide access to the Application, not necessarily a group that can access JIRA Projects.

10. Click on the group name *jira-software-users*
11. Click on **Create new user** in the upper right hand corner and fill out the following information:
Email Address: becky@expensigogo.com
Full Name: Becky Sanders
User Name: Becky
Password: Charlie!

Create new user

Email address *	E.g. charlie@atlassian.com
Full name *	User's full name
Username *	Becky
Password	•••••••• (i)

If you do not enter a password, one will be generated automatically.

☐ Send notification email (i)

Application access ⚠ JIRA Service Desk (includes JIRA Core)
☑ JIRA Software (includes JIRA Core)
☑ JIRA Core

☐ Create another

Create user Cancel

Atlassian JIRA Project Management Software (v7.6.3#76005-sha1:8a4e38d) · About JIRA ·
Report a problem

This JIRA site is for non-production use only.

✗ Atlassian

12. Click *Create User*

Congratulations! You've successfully added a new user to JIRA Software! You will need to grant Becky access to Confluence as well for a later exercise. Do so now using the following steps.

1. Go to *User Management* and select **Groups** on the left-hand side

2. Next to the group *confluence-users*, select *Edit Members*

Group name	Users	Permission schemes	Actions	
bamboo-admin	3		Edit members	Delete
confluence-administrators	3		Edit members	Delete
confluence-users	21		Edit members	Delete

3. Click the people icon

next to the Add Members text box
4. Select Becky in the dialog box and hit enter

5. Click *Add users*
6. Becky is now added to the group

22 Group member(s)
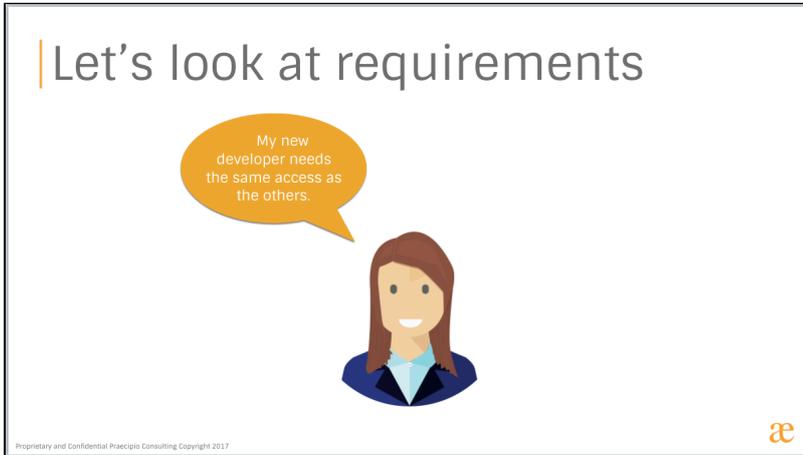
confluence-users
   Becky
   alice
   angie
   ben
   charlie
   daniel
   elizabeth
   homer
   jan

Exercise 2 - Validate User Access

In this exercise, you'll validate Becky's access to JIRA Software. If we remember, the requirements for Becky's access is to have the "same access as the rest of the team members."

We've added Becky to JIRA Software. How do we verify if Becky has access to the correct JIRA Projects?
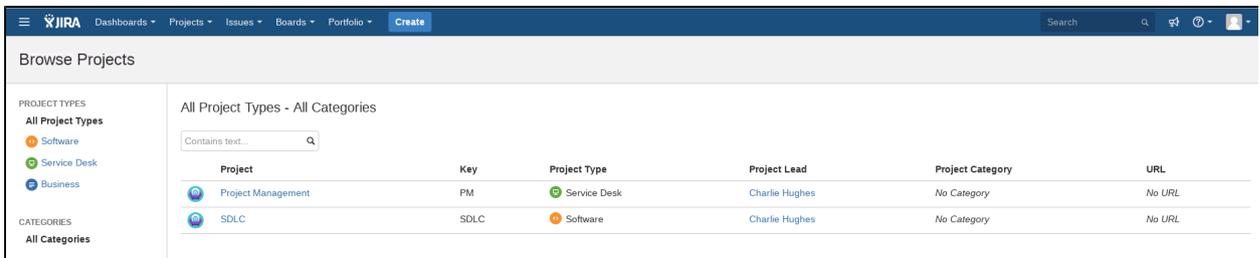
1. Log out of JIRA by clicking on the ghost avatar and select *Log Out*.
2. Click *Log in again* in the dialog box
3. Log in as Becky (**becky/Charlie!)**
4. Click Log in or hit enter

> You will be walked through a first time user access menu. Follow the prompts on the screen:
>
> Language: English
>
> Avatar: skip this by clicking *Next*
>
> What would you like to do now? Select *Explore the current projects*

5. In the Browse Projects Menu, on the left-hand side, click *Software*

> Question: *How many JIRA Projects do you see?*
>
> Answer: *1 project named SDLC*

Exercise 3 - Troubleshoot and Fix Access

Becky is part of the App Development team, but not the Web Development team. However, she currently only has access to the SDLC project. In the previous requirements, the project manager stated only, "Becky needs the same access as everyone else." Currently, Becky does not have access to the correct JIRA Projects because we practice good governance. Providing her access to the JIRA Software as the Application did not automatically provide her access to the JIRA Projects she needs to work in. We need to add her to the correct groups to make sure she can use the correct JIRA Projects.

1. If you haven't already done so, log out as Becky and log in as Charlie
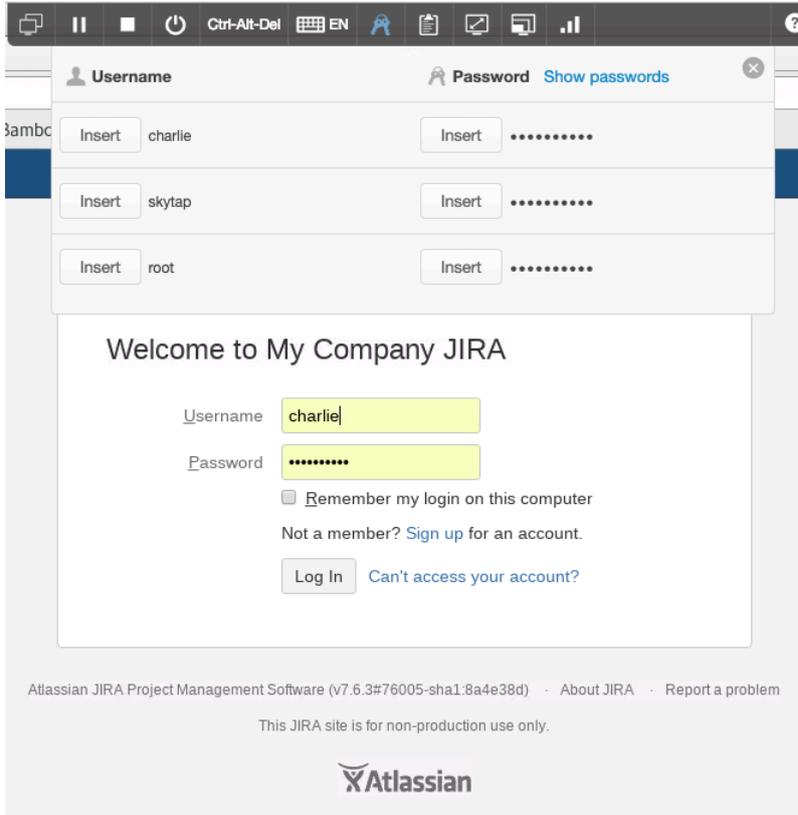
2. Go to **Projects App Development**
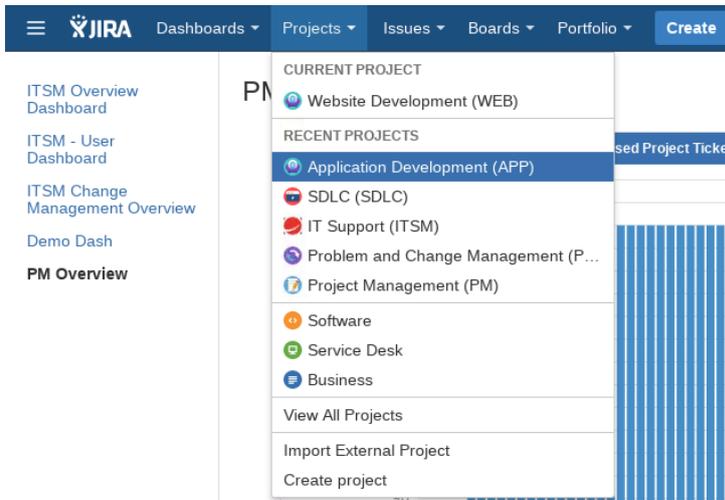
3. Select **Project Settings (cog icon)** in the lower left-hand corner
4. On the left hand side, select **Permissions**
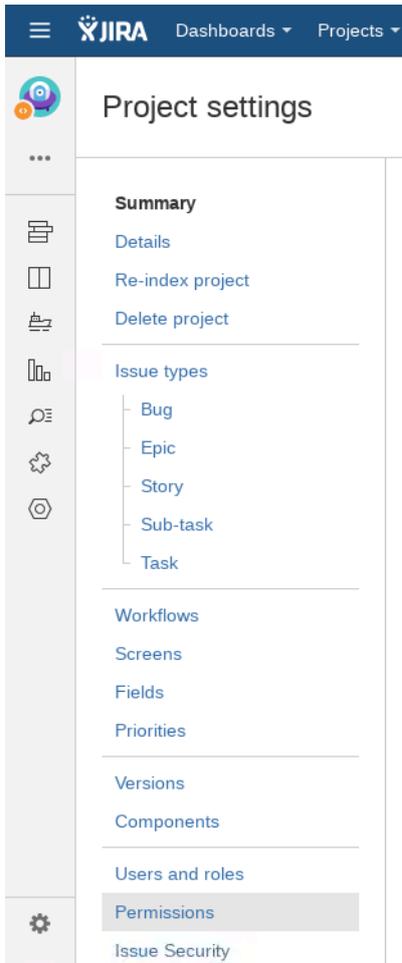
5. Observe the *Roles* associated to the *Permissions*

> Question: How many JIRA Projects share this Permission Scheme?
>
> Answer: 2
>
> Question: How many Roles are in the Permission Scheme?
>
> Answer: 3 - Administrators, Scrum Master, and Developers
>
> Question: Which two roles are associated to the Browse Projects Permission
>
> Answer: 2 - Developers and Administrators

6. On the left hand side, click *Users and roles*

> Question: How many Roles are visible on the screen?
>
> Answer: 2 - Administrators and Developers

7. In the upper right hand corner, click *Add users to a role*
8. Search for Becky

9. In the second drop down, select the Developers Role

10. Click *Add*
11. Becky should be added to the Developers Role

Name	License	Username	Email address	Last session
DEVELOPERS Showing 2 of 2				
👥 developers				
🔲 Becky Sanders	Software	Becky	becky@expensigogo.com	Today 2:23 PM

12. Log out as Charlie by clicking on the ghost avatar and selecting *Log out*
13. Click *Log in again* and Log in as Becky (**becky/Charlie!)**
14. From the Global Header, click on *Projects Software*

Question: How many JIRA Projects can Becky see now?

Answer: 2 - SDLC and App Development

Congratulations on completing the Lab!

# Lab 3.0 - JIRA Administration and Impacts to the Instance

In this Lab, you will make changes to the JIRA instance that will have lasting impacts to the structure of every JIRA product. JIRA Core, JIRA Software, and JIRA Service Desk share a set of objects. Statuses, Permission Schemes, Issue Types are all examples of objects that may be shared across all three JIRA applications. Making changes to the Objects themselves will impact all three JIRA applications.

Exercise 1 - Workflow Status Change

In this exercise, you will make a change to a workflow status that is used by all three of the JIRA Applications. You will also observe how all issues in the JIRA projects are impacted by the change. You will need to access the instance as Charlie using the Skytap credentials.

One of your Team Leads wants to make a change to their workflow. Instead of using Open as the initial status, they'd like to use Not Started.

1. If you have not done so, log out as Becky and log back in as Charlie.
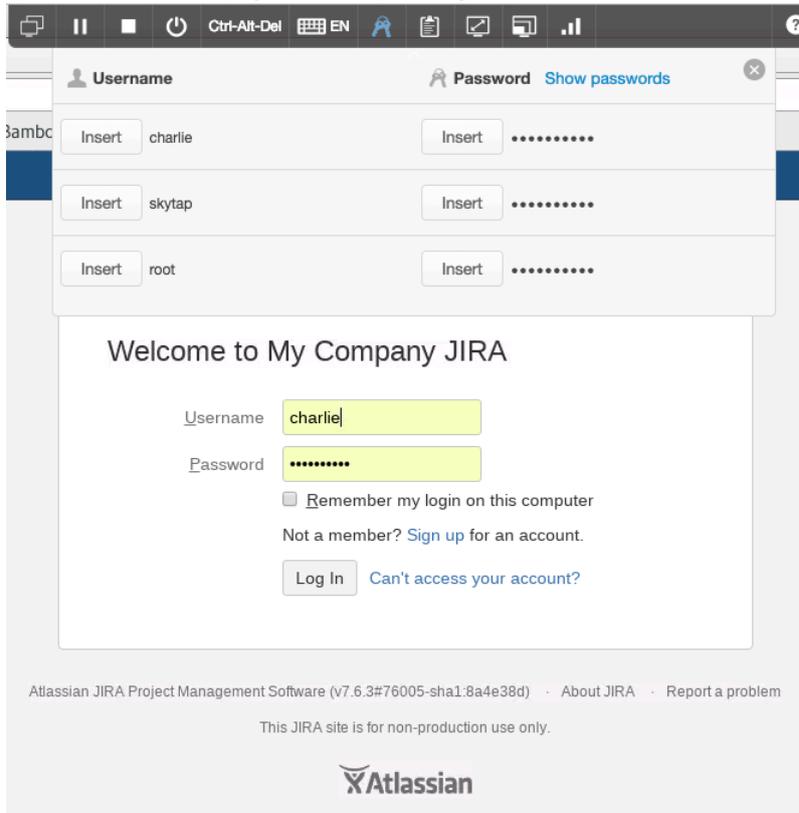
2. Go to *Issues Search for Issues*
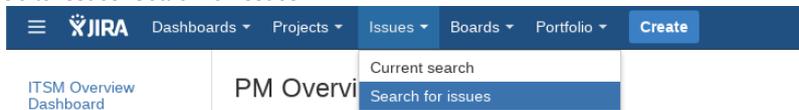
3. In the search bar, type the following:

    status = Open

4. Hit enter

> *Question: How many results show up?*
>
> *Answer: 34*

5. Click on *Export Dashboard Charts*
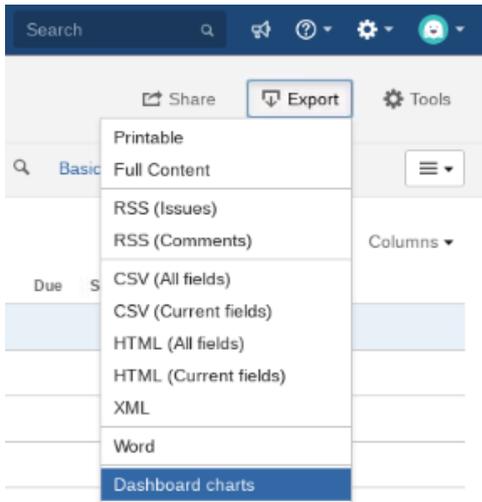
6. On the left-hand side, click *Pie Chart*

7. In the lower right hand side, click the *cog icon* and select *Edit,* then select *Project* as the statistic type, then select *Save*
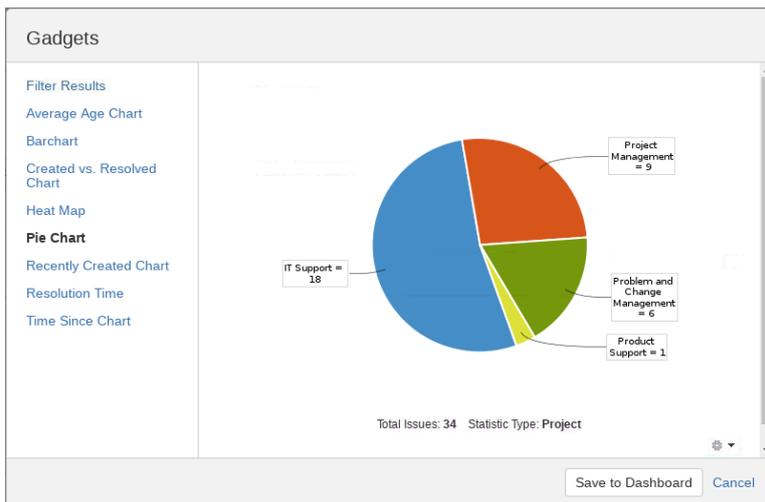
Question: How many JIRA Projects do you see?

Answer: 4 - IT Support, Project Management, Problem and Change Management, Product Support.

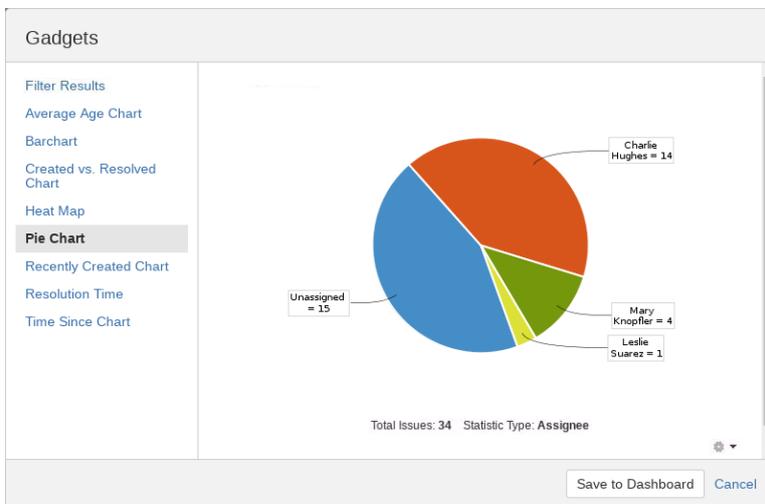8. Go to the Administration Cog Icon and select *Issues*
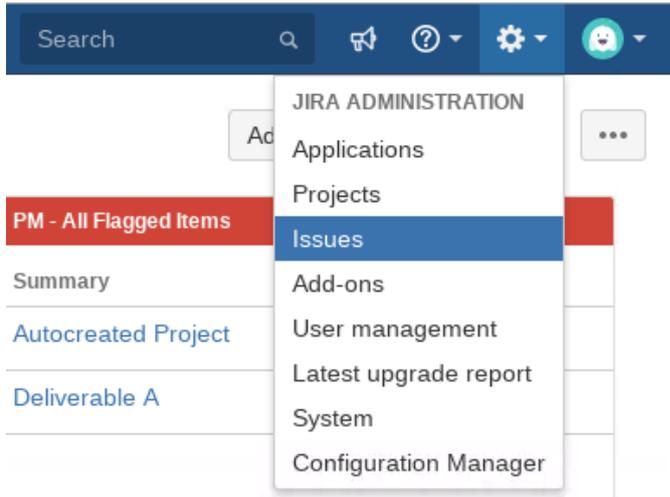
9. Enter the password for Charlie again
10. On the left-hand side, scroll down to**Issue attributes** and select **Statuses**

> Question: How many associated workflows use the status named Open?
>
> Answer: 17 Associated Workflows

11. Click on *17 Associated Workflows* to open the list of associated workflows
12. Observe the list of workflows:

Associated workflows for Open

- Copy of ITSM Service Request and Incident Management WF
- Delete Me
- ITSM Change Request Workflow
- ITSM Personnel Workflow
- ITSM Problem Workflow
- ITSM Service Request and Incident Management WF
- ITSM Simple Task WF
- PM Deliverable WF
- PM Deliverable WF
- PM Epic WF
- PM Project Request WF
- PM Risk WF
- PM Simple Task WF
- SDLC Epic Workflow
- SDLC Simple Task Workflow
- SDLC Story Workflow
- classic default workflow
- jira

Close

13. Click *Close*
14. On the right hand side, click *Edit*

15. Change the name of the status to Not Started and click *Update*
16. Go to *Issues Search for Issues*
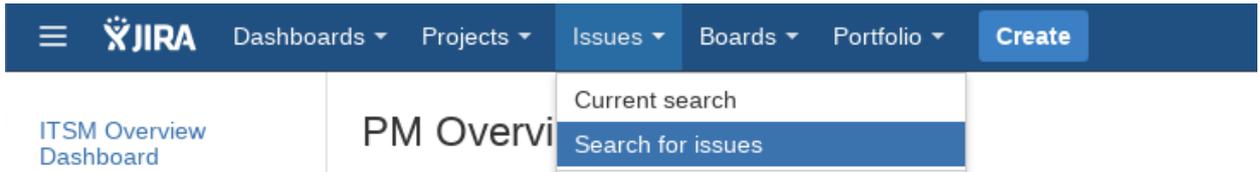
17. In the search bar, type the following:

    status = Open

18. Hit enter

> Question: How many results show up?
>
> Answer: 0

By changing the Workflow Status name instead of adding a new workflow Status and modifying the Workflow, all issues that were formerly in Open are now in Not Started across the entire instance regardless of the application. JIRA Service Desk, JIRA Software, and JIRA Core have all been affected. Any filters using "status = Open" will show no results.

Exercise 2 - Permission Scheme Change

In this exercise, you will make a change to a Permission Scheme that impacts both the App Development and Web Development projects. Role-based permissions are considered a best practice instead of group based permissions.

If we remember Becky, she was provided access to the App Development project, but not the Web Development project. We'll use this same scenario in this exercise to open and close her permissions.

1. Make sure you are logged in as Charlie
2. Go to the Administration Cog Icon and select *Issues*
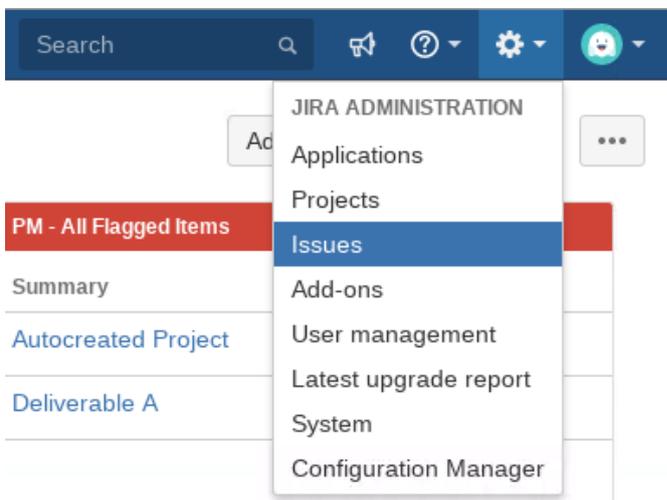
3. Enter the password for Charlie again
4. On the left hand side toward the bottom, select **Permission Schemes**

5. Click *Permissions* next to the **Best Practices Permission Scheme**

🔒 Permission schemes

Add permission scheme

Permission Schemes allow you to create a set of permissions and apply this set of permissions to any project.

All permissions within a scheme will apply to all projects that are associated with that scheme.
The table below shows the permission schemes currently configured for this server. For permissions that apply to all projects see Global Permissions.

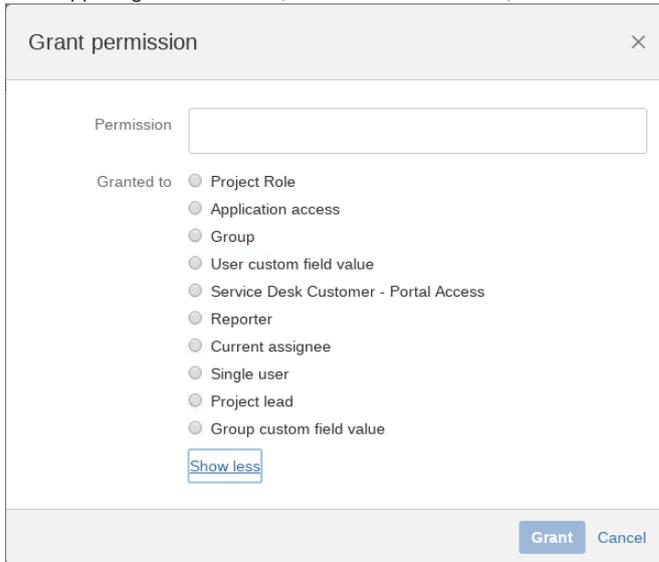Learn more about project permissions

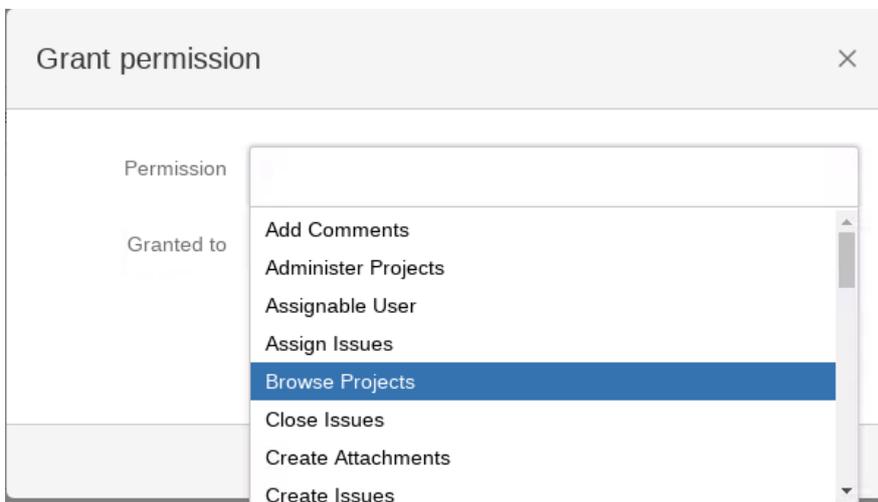| Name	Projects	Actions
Best Practices Permission Scheme	• Application Development • Website Development	Permissions Copy Edit Delete

> *Question: How many JIRA Projects use this Permission Scheme?*
>
> *Answer: Under the name of the Permission Scheme (Best Practices Permission Scheme), it shows **Used by 2 Projects.***

6. In the upper right hand corner, click *Grant Permission*, then click *Show more* in the dialog box to view all permission options

Grant permission   ✕

Permission [   ]

Granted to ○ Project Role
            ○ Application access
            ○ Group
            ○ User custom field value
            ○ Service Desk Customer - Portal Access
            ○ Reporter
            ○ Current assignee
            ○ Single user
            ○ Project lead
            ○ Group custom field value
            [Show less]

                                                    [Grant] Cancel

7. Click into the text box next to Permissions and select *Browse Projects*

Grant permission   ✕

Permission [   ]

Granted to
            Add Comments
            Administer Projects
            Assignable User
            Assign Issues
            Browse Projects
            Close Issues
            Create Attachments
            Create Issues

8. Select the radio button next to Group and choose *jira-software-users*
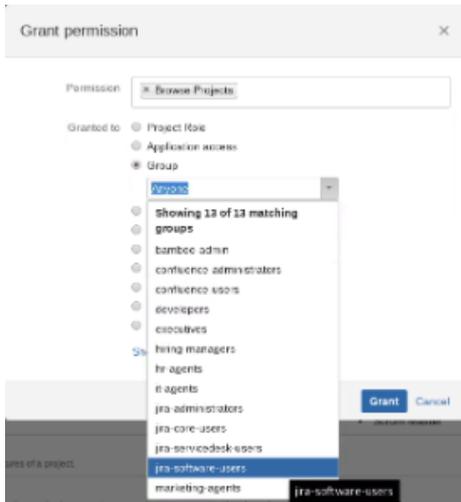
9. Click *Grant*
10. Log out as Charlie and log back in again as Becky (**becky/Charlie!**)
11. From the Global Header, click on *Projects Software*
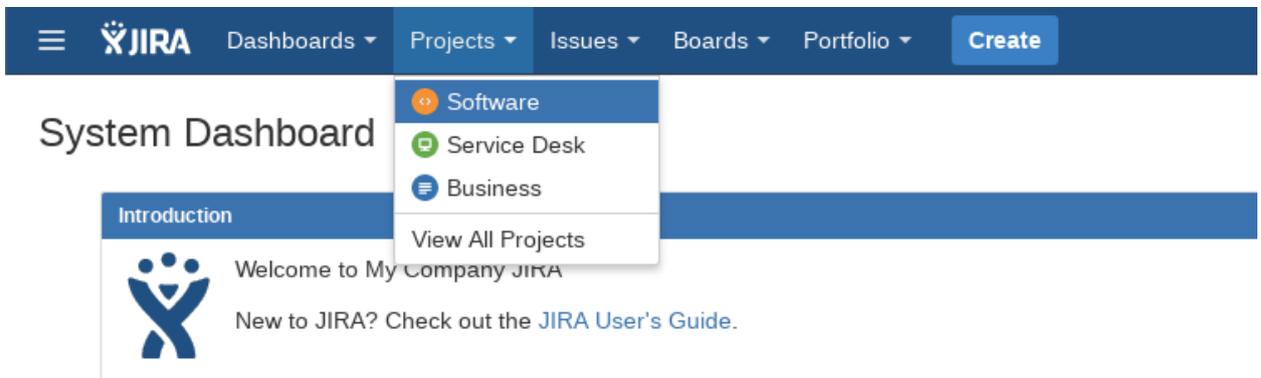
Question: How many JIRA Projects can Becky see now?

Answer: 3 - SDLC, App Development, and Web Development

By adding the jira-software-users group to the permission scheme, anyone in that group can now see ALL JIRA Projects using that Permission Scheme.

Congratulations on completing the lab!

Lab 4.0 - Confluence Information Architecture

In this Lab, you will practice creating a Space, configuring permissions for the Space, and Restricting Pages. You will be logging in as both Charlie and Becky throughout the exercises. Becky was added to the confluence-users group during the first exercise. At this point, she will be able to access Confluence.

The project manager would like a new Space to house all things upcoming release for one of the products. Instead of reusing another Space, you are asked to create a new one following these requirements:

- The Space should have Meeting Notes and Product Requirements as Parent Pages.
- The Space should be visible to all *jira-software-users*.
- Becky will be named the Space Administrator.
- Only Becky should be able to Restrict Pages.
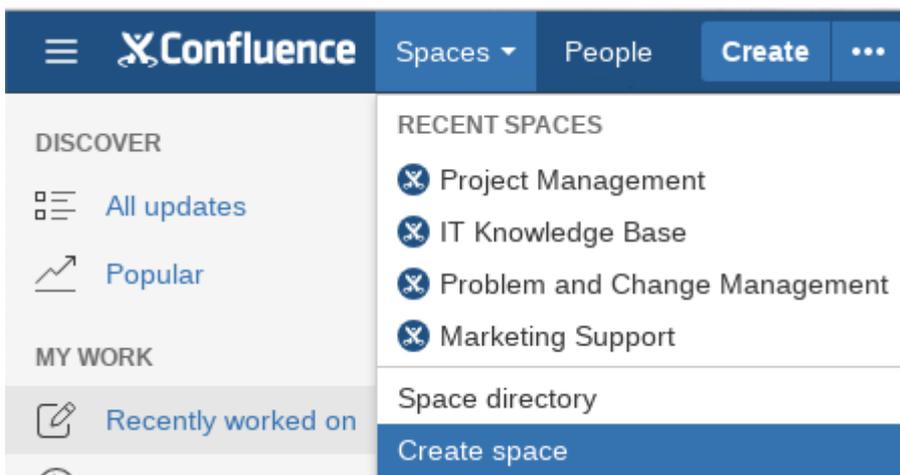- Becky will only restrict compartmentalized information as needed.

Exercise 1 - Create a Space

Creating a Space using a Confluence Space Blueprint means that you can designate how the navigation of the Space should behave without having to do it yourself. In this exercise, we are going to select a Space Blueprint that works best with our requirements. Specifically, Meeting Notes and Product Requirements are Parent Pages in the Space.

1. Using the *Application switcher* in the upper left-hand corner, choose Confluence
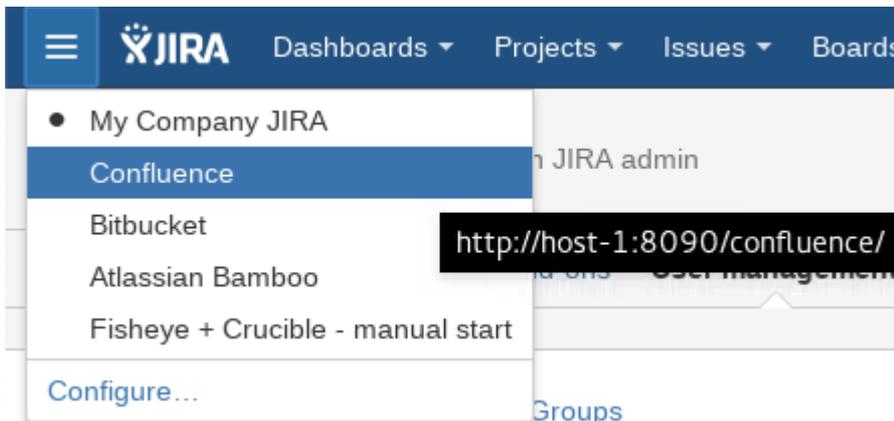
2. Login using the Charlie credentials
3. Under the Spaces menu in the Global Header, choose *Create Space*

4. Select **Software project space** and click *Next*

If you read the description under the Software project space, you see it specifically calls out software requirements and meeting notes in the description.

5. Select the SDLC JIRA Project, name it *New SDLC Space*, leave the Key as it is and click *Create*

Question: What is listed under Space Shortcuts on the left-hand side?

Answer: Jira: SDLC

Question: How many Parent Pages are listed under the Page Tree?

Answer: 5 - Decision Log, File Lists, Meeting Notes, Product Requirements, Retrospectives.

Congratulations on completing the exercise! You now have a brand new Confluence Space.

Exercise 2 - Configure Permissions

Let's take a look at the requirements from the beginning of this Lab.

The project manager would like a new Space to house all things upcoming release for one of the products. Instead of reusing another Space, you are asked to create a new one following these requirements:

- The Space should have Meeting Notes and Product Requirements as Parent Pages. ✅
- The Space should be visible to all *jira-software-users*.
- Becky will be named the Space Administrator.
- Only Becky should be able to Restrict Pages.
- Becky will only restrict compartmentalized information as needed.

We need to configure the Space permissions to fulfill the requirements.

1. In the lower left-hand corner, click on *Space Tools Permissions*
2. Observe the following permissions:

Space Tools

Overview **Permissions** Content Tools Look and Feel Integrations

Permissions	Restricted Pages

Licensed Users

Groups

Grant permissions for this space to all the members of a group.

	All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
	View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
confluence-users	✅	✅	✅	❌	✅	❌	✅	❌	✅	❌	❌	❌	✅	❌

[Edit Permissions]

Individual Users

Grant permissions to individual users, regardless of which groups they are a member of.

	All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
	View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
Charlie Hughes (charlie)	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅

[Edit Permissions]

> *Question: Can all confluence-users view this Space?*
>
> *Answer: Yes. They can also Add pages, blogs, and comments to all pages in this Space.*

3. Click *Edit Permissions* under the **Groups** section and use Charlie's credentials
4. Search for *jira-software-users* in the selection box and click on *Add* to add the group

Groups

Grant permissions for this space to all the members of a group.

	All
	View
confluence-users	Select All ☑

jira|

🔲 jira-administrators
🔲 jira-core-users
🔲 jira-servicedesk-users
👥 **jira-software-users**

🔍 Add

ember of.

All

5. Deselect permissions from the *confluence-users* group and check the boxes next to the *jira-software-users* group matching the picture below

Groups

Grant permissions for this space to all the members of a group.

		All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
		View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
confluence-users	Select All	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
jira-software-users	Select All	☑	☐	☑	☐	☑	☐	☑	☐	☑	☐	☐	☐	☐	☐

🔍 Add

6. Under the **Individual Users** section, search for Becky and click *Add*

Individual Users

Grant permissions to individual users, regardless of which groups they are a member of.

		All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
		View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
Charlie Hughes (charlie)	Deselect All	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑

Beck|

👤 Becky Sanders (Becky)

🔍 Add

7. Deselect Admin and Delete permissions from Charlie and check the boxes next to Becky matching the picture below

Individual Users

Grant permissions to individual users, regardless of which groups they are a member of.

		All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
		View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
Becky Sanders (Becky)	Select All	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐	☑
Charlie Hughes (charlie)	Select All	☑	☑	☑	☐	☑	☐	☑	☐	☑	☐	☐	☐	☐	☐

🔍 Add

8. Click *Save all*

Congratulations! You've now configured Confluence Space Permissions!

Exercise 3 - Restrict Pages

In this exercise, we're going to restrict a Page to maintain compartmentalization in the Space.

Let's take a look at the requirements from the beginning of this Lab.

The project manager would like a new Space to house all things upcoming release for one of the products. Instead of reusing another Space, you are asked to create a new one following these requirements:

- The Space should have Meeting Notes and Product Requirements as Parent Pages. ✅
- The Space should be visible to all *jira-software-users*. ✅
- Becky will be named the Space Administrator. ✅
- Only Becky should be able to Restrict Pages. ✅
- Becky will only restrict compartmentalized information as needed.

Becky needs to create a specific Parent Page she can access that is not visible to Charlie or any other user in this Space.

1. Log out of Confluence as Charlie, and log back in as Becky (**Becky/Charlie!**)
2. Because this is the first time you've logged into Confluence, you will have to skip some menus
   a. On the first screen, click Skip below the video
   b. On the second screen, click Skip under Drag an Image Here
   c. On the second screen, select New SDLC Space, then click *Finish*
3. Click *New SDLC Space* on the left-hand side under **My Spaces**

> When navigating to a Space, you will always end up at the Home Page for that Space.

4. Click *Create* in the Global Header. This defaults to a Blank Page
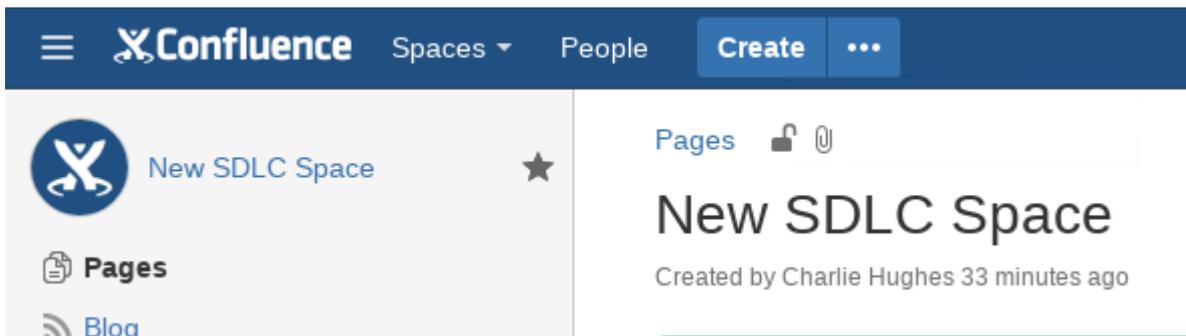
5. Give the page a title and click the Lock icon to pull up the restrictions dialog
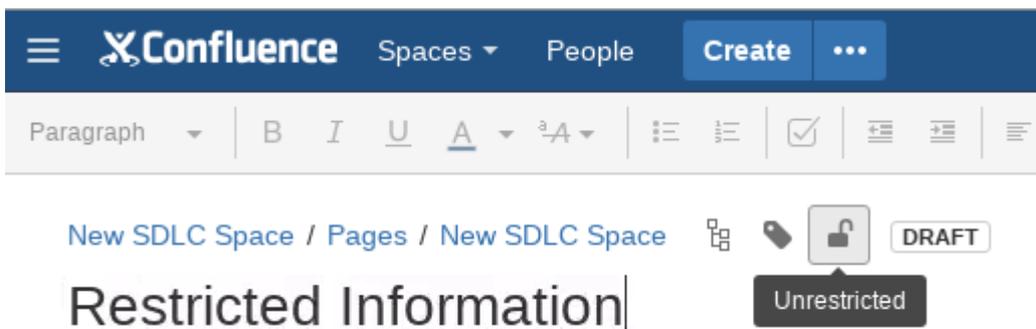
6. Select *Viewing and Editing Restricted*

Restrictions

Help

🔒 Viewing and editing restricted ▾   Only some people can view or edit.

| Type a user name or group | Can view and edit ▾ | Add |

| 👥 Everyone | Has no access |
| 👤 Becky Sanders | Can view and edit |

Apply   Cancel

> Because Becky is creating the page, the restrictions will default to her.

7. Click *Publish* in the lower right hand corner

> *Question: How many Parent Pages can Becky see on the left-hand side?*
>
> *Answer: 6 - Decision Log, File Lists, Meeting Notes, Product Requirements, Restricted Information, Retrospectives.*

8. Log out as Becky and log back in as Charlie
9. Go to Spaces in the Global Header and click on *New SDLC Space* under the **Recent Spaces** menu

> *Question: How many Parent Pages can Charlie see on the left-hand side?*
>
> *Answer: 6 - Decision Log, File Lists, Meeting Notes, Product Requirements, Restricted Information, Retrospectives.*

> Because Charlie is a Confluence Administrator, he can see restricted pages in every Space.

Congratulations on completing the lab!