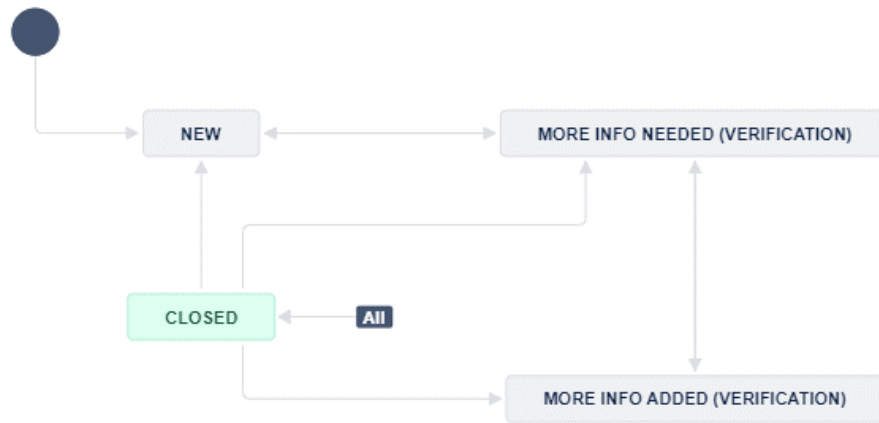


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Basic Statuses and Workflow for User Tickets



c

- **New:** An issue is new to the project, requires action
- **More Info Needed (Verification):** A ticket requiring more details before being addressed. The necessary details should be clearly asked for in the ticket.
- **More Info Added (Verification):** A ticket which has been supplied with all the info needed for further investigation.

Glossary for Jira

Issues: The tickets / cases in a project.

Agent: Support agent that works on issues and communicate with customers. Agents can access, view, and edit issues in the service desk project.

Customer: Is the reporter / end user that reported the issue.

Dashboard: Think of dashboards as a landing page for Jira. When you start your day and would like a quick overview of the status of your project and issues.

Filter: A filter is technically a Jira “JQL” search result. This results in a list / view of issues based on their status, reporter field, or other custom criteria.

Board: A board is a quick view of the ongoing issues within your project. The issues which show up on your board are determined by Filters.

Project Overview

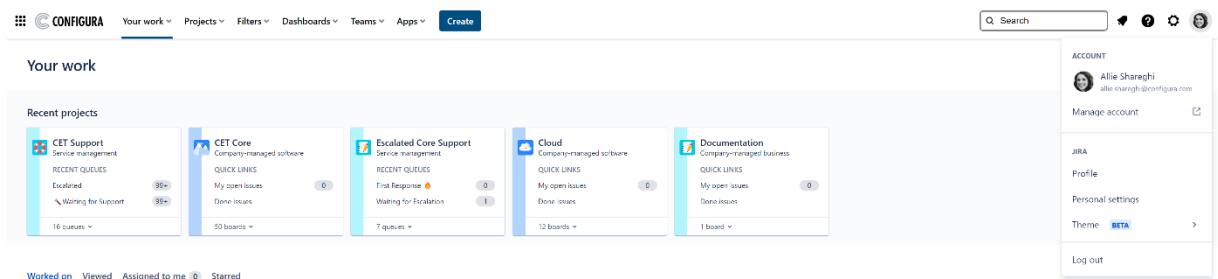
Jira Application Header

At the top of the page, you will find the Jira Application header:



Going from left to right, the header contains the following items:

- **Atlassian Apps:** Clicking on the Atlassian app icon displays an option to switch between different JIRA products.
- **Jira Home Button:** Click the Home Button to go to your home screen at any time. In your Profile Settings you can change what to use as your home screen, among other things. The Profile Settings are accessed through your avatar in the top right corner of the screen:



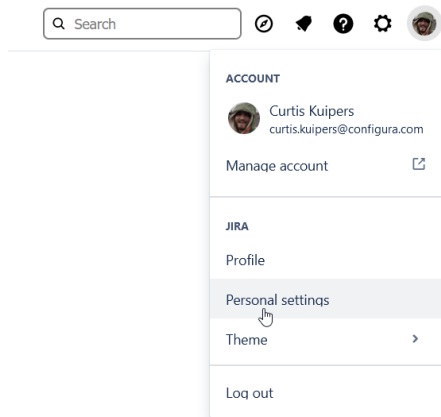
- **Your Work:** This is a quick way to view assigned tickets and any tickets you have viewed recently.
- **Projects:** Lets you view recent projects and browse a list of all projects you have access to.
- **Filters:** Lets you view saved searches that you or your colleagues have created.
- **Dashboards:** Each project has a default dashboard, but you can also create a personal dashboard. Dashboards are designed to display gadgets that help you organize your projects, keep track of issues you are working on, and follow up on achievements in different charts.

You can see all available dashboards by selecting the **Dashboards** drop-down from the Jira application header. The [Configuring Dashboards](#) page provides more information.

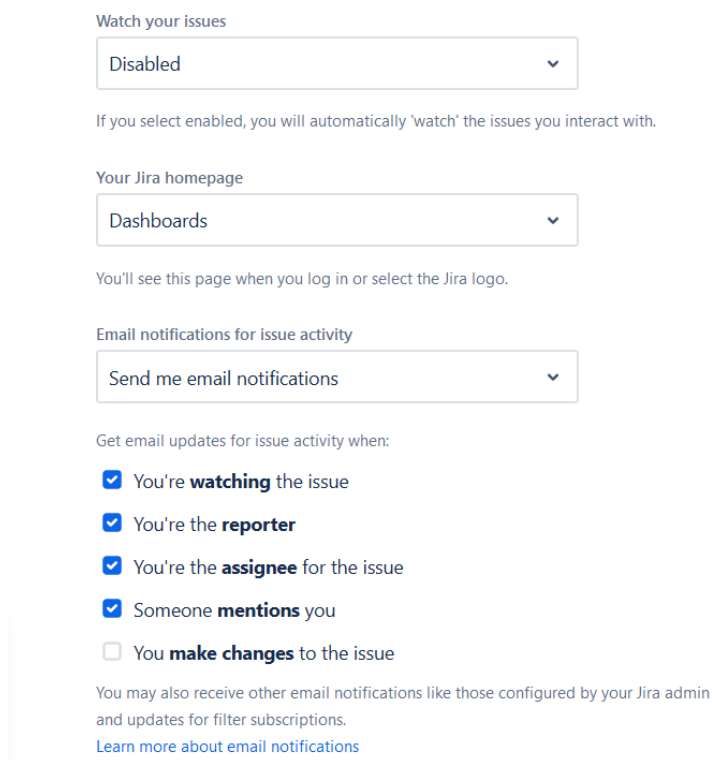
- **Teams:** Allows you to create groups from the internal JIRA users. It can be used to send an internal comment to team members instead of one individual user.
- **Apps:** This is the Atlassian app marketplace. There are gadgets and third-party integration apps that you can install into JIRA Cloud for additional functionality.
- **Create:** Lets you create new issues. You can also use the keyboard shortcut 'C'.
- **Search:** Quick search for issues and projects.
- **Notifications:** A quick way to view any recent notifications on tickets that you are assigned or are watching.
- **Jira tools:** Buttons for submitting feedback, getting help and Project Administration.
- **User profile:** Click the avatar to access your user profile. This is also where you change your home screen.

Personal Settings

Before diving in, it can be good to be sure you know how your profile is configured.

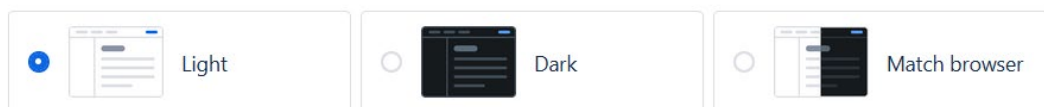


Here, you can set up how often Jira notifies you via email and about what. Consider first whether you want to automatically become a Watcher for every issue you modify. As for emails, the emails you receive from Jira can quickly add up, so it is recommended to set up rules in your mail client fairly early based on key words in the messages to be sure you are seeing everything you need to see!



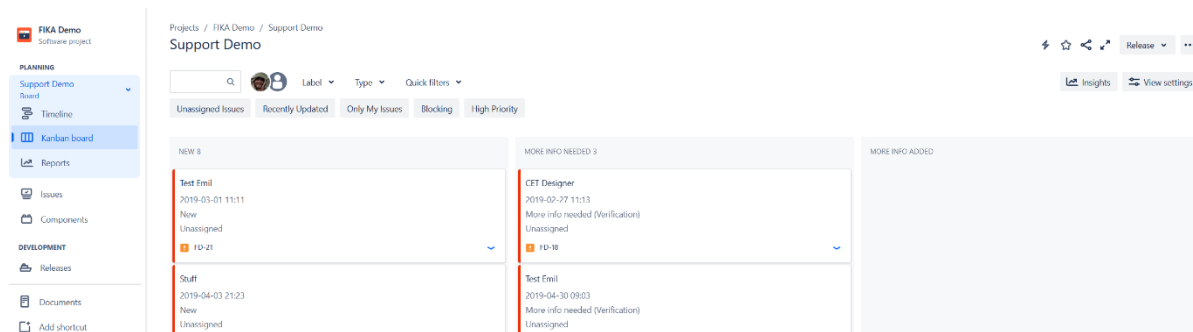
Identify more with the Dark Side? Or do you just want to save that extra bit of electricity! In the section below, you can adjust your theme.

Theme



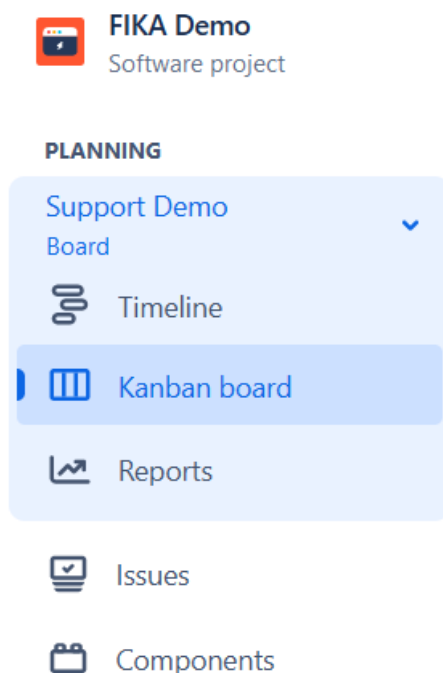
Areas in a Project

This is an overview of the different areas in a Jira project which can pertain to the Support role. They are described in more detail below.



Sidebar

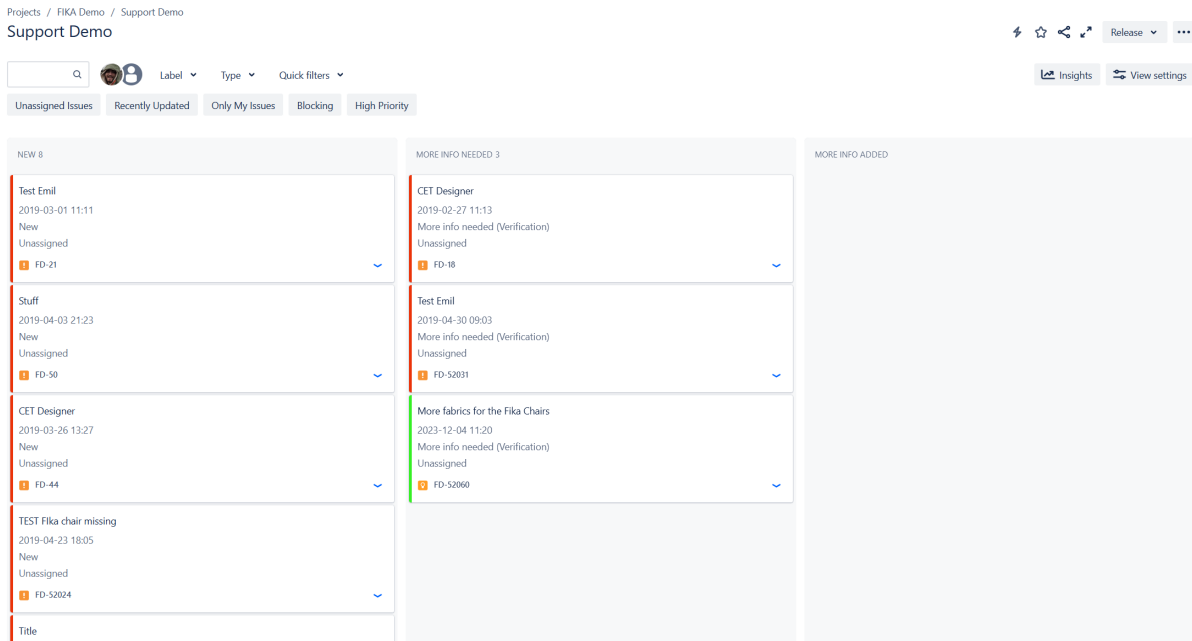
To the left is a sidebar:



- **Kanban Board:** View your new and ongoing issues. By Default, the board is set up to show User Bug Reports, User Feature Requests, and Crashes.
- **Reports:** View reports about your project.
- **Issues:** This is where you can see Filters of issues. The DEFAULT FILTERS look within your current Project, and the STARRED FILTERS can be any Searches that you have starred.
- **Components:** These are applied on tickets to categorize them.

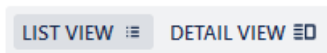
Board

The Kanban board visualizes the amount and status of tickets. Boards can be customized, so we are providing a simple board that should meet the needs of most extension support teams.



Issues

Issues is a more detailed view of each issue within the project. These are organized by Filters, which are technically search results. There are two main views of issues which might serve your needs better in different situations:



List View

List view is more like a standard table, where you can select columns to show and sort by relevant information about your issues.

Projects / FIKA Demo

Issues

Share Export issues Go to all issues LIST VIEW DETAIL VIEW

project = "FD" ORDER BY created DESC

Key	Summary	Assignee	Status	Created	Updated	Labels	Type
FD-52064	Bug Report Test	Unassigned	NEW	Dec 7, 2023	Dec 7, 2023	14.0	...
FD-52063	CET Crash; Test	Unassigned	NEW	Dec 7, 2023	Dec 7, 2023	14.0	...
FD-52062	The chair is detecting all WS edges	Unassigned	NEW	Dec 6, 2023	Dec 6, 2023		...
FD-52061	Test User Feature Request	Unassigned	MORE INFO ADDED (VERIFICATION...	Dec 4, 2023	Dec 6, 2023		...
FD-52060	More fabrics for the Fika Chairs	Curtis Kuipers	MORE INFO ADDED (VERIFICATION...	Dec 4, 2023	Dec 6, 2023		...
FD-52058	old discontinued fika files in the setting up CET designer course	Unassigned	NEW	Mar 10, 2023	Jul 13, 2023		...

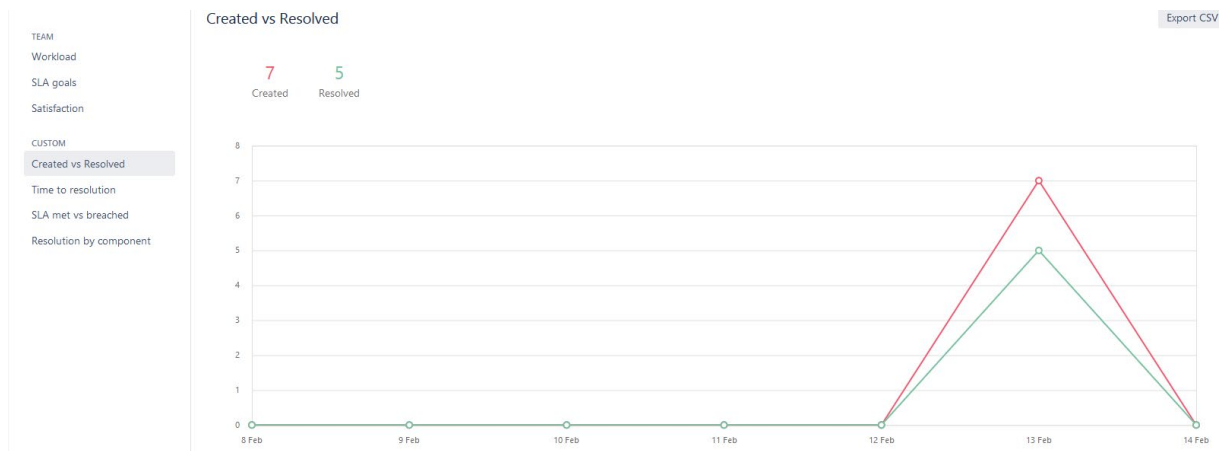
Detail View

Detail view provides a similar view to the board, except in this case it is only one column representing the list of issues, and the main focus is the fields for whichever issue is currently selected.

The screenshot shows the Jira interface for a specific issue. On the left is a sidebar with a list of issues, including 'Bug Report Test' (FD-52064), 'CET Crash: Test' (FD-52063), and others. The main area displays the details for 'Bug Report Test' (FD-52064). The issue description reads: 'The chair is detecting all WS edges'. The reporter is 'Allie Shareghi' and the assignee is 'Unassigned'. The issue is categorized as 'mode: release'. A user message states: 'I would like to report the following issue: This feature in CET is not working correctly.' The right sidebar shows the 'Details' section with fields for Assignee, Reporter, Labels, Reporter Email, Team, Found In, Impact, Fixed In, Developer, and QA.

Reports

Different ticket reports such as “Workload”, “Created vs Resolved Issues”, etc. are available in the Reports view:



Creating an Issue

If you wish to create an issue in your project, follow these steps:

- Click **Create** in the Jira header. The Create Issue dialog opens.



- Specify the Project, Issue type, Summary, Description, Reporter etc. for the issue:

Create issue
— ↗ ✕

Project * 1 Import issues ...

CET Support (CS) ▼

Issue type *

Quick Question ▼

[Learn more](#)

Request type * What's this?

Ask a Question ▼

We're here to help you with *questions/problems* regarding the CET ecosystem. Or if you just need so...

Use request type fields

Resolution

 ▼

(Migrated on 10 Jun 2023 01:32 UTC) [Learn more](#)

Summary *

(Migrated on 10 Jun 2023 01:32 UTC)

Description

Normal text ▼ | **B** *I* ... | A ▼ | | | | | | | | + ▼

We support markdown! Try ****bold****, `'inline code'`, or ````` for code blocks.

(Migrated on 10 Jun 2023 01:32 UTC)

Labels

Select label ▼

(Migrated on 10 Jun 2023 01:32 UTC)

Components

 ▼

(Migrated on 10 Jun 2023 01:32 UTC)

Create another issue

Cancel Create

- Click the **Create** button to create the issue in the project that you specified.

T	Key	Status	Summary	Created	Updated	Reporter	Assignee
■	FS-53	WAITING FOR SUPPORT	Test issue	2019-02-27	2019-02-27	Emil Björk	FIKA Support Person

Areas in an Issue

An issue is opened by clicking it on the Dashboard or from a Queue. The issue looks like this:

The screenshot shows a Jira issue page for the ticket CS-61895. The issue title is "There are problems showing the graphics of this drawing" error. The page is divided into several sections:

- General:** Shows the issue key (CS-61895) and a "Link issue" button.
- Description:** The user reports: "I would like to report the following issue: I get the 'There are problems showing the graphics of this drawing' error. And CET has crashed on me multiple times."
- User info:** The user's name is redacted.
- Uploaded files:** A list of 20 files, including DWG files, log files, and configuration files.
- SLAs:** A list of Service Level Agreements (SLAs) with their status and due dates. The most recent one is "Waiting for customer" due on May 28 02:05 AM.
- Your pinned fields:** A section showing key fields like Priority (Low), Assignee, Reporter, Request Type (Automatic bug report), Escalated Resolution (None), and Escalated Status (None).
- Details:** A section showing Request participants (None), Components (2D / 3D Graphics), Labels (10.0), ChatLog (NO CHAT), Reporter Company, Reporter Email (no-reply@configura.com), Automation (Rule executions), and Sentry (Linked Issues).

Issue Key and Summary


At the top left you will find the **Issue key** and the **Summary**:

This close-up shows the top left corner of the Jira issue page. It displays the navigation links "Back" and "CS-61895", the issue title "There are problems showing the graphics of this drawing" error, and the "Link issue" button.

Issue key is a unique identifier for your ticket based off the project it is in, and the order in which the ticket was created. CS-61895 belongs to the project with code **CS** and is the **61895**th issue within the project.

Summary serves two main purposes. It is a searchable name for the ticket that also provides a quick understanding of what the ticket handles. Consider that the user may also need to use the summary to search their emails for the ticket correspondence.

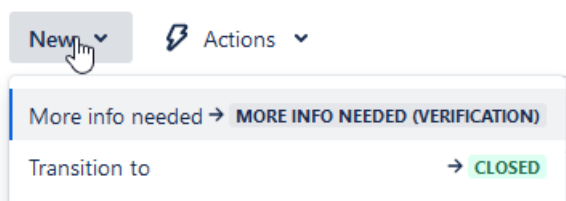
Additional Ticket Tools

The additional ticket option menu is to the right of the Issue Key and the Summary/Title, under the  button. Clicking on the that button will display a list of the actions you have for interacting with an issue and are presented below:

Transition Buttons

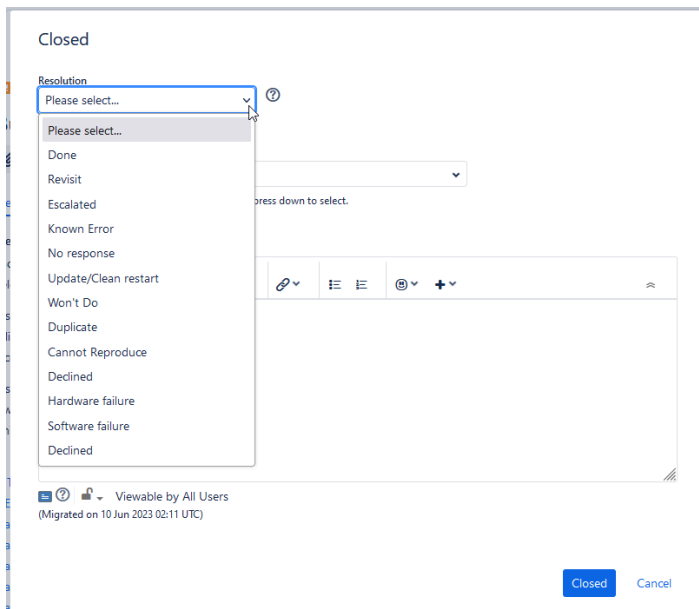
There is an automation set up to change your ticket status from **New** or **More Info Added** to **More Info Needed** when you use the Email This Issue functionality. Similarly, when you receive a reply to on the ticket it will transfer to **More Info Added**.

You can also manually change the issue from one status in the workflow to another. A friendly reminder to add comments when making edits on tickets if needed!



Close




Use the Transition menu from above to Close a ticket. To be able to close an issue in the **Close** dialog you must select a resolution to the issue. You can also submit a comment.



Details

In the **Issue Details** you will find the following information:

- **Assignee** – The technician assigned to the ticket.
- **Reporter** – The user who reported the ticket.
- **Priority:** What priority the issue has – Blocker, Very High, High, Medium, Low, Lowest, No Priority.
- **Components:** Can be used for different kinds of products or features, for example.
- **Labels:** Can be used for categorizing issues and when searching for issues.
- **Type:** What type of issue it is – Bug, Crash, New Feature or Support Issue.

Details	
Assignee	 Branden Bouwkamp Assign to me
Reporter	 YHGUERCA@GMAIL.NET
Request participants	None
Priority	Low
Components	None
Labels	None
Request Type	 Automatic bug report
ChatLog	NO CHAT

Description

This is the issue description where you can read what the customer/reporter wrote in the description field when the issue was submitted. The description also contains files that were attached to the bug/crash report, such as logfiles, or drawings etc.

If the issue type is a crash, there will also be a link to the crash in the crash handling system Sentry.

If the customer/reporter submitted an issue through email and not from CET, you will find the email message here as well.

▼ Description

The program crashed when I was trying to: open my drawing

<https://sentry.configura.com/cet-designer/test-project/issues/11800/events/316502/>

User info:

Test@configura.com, Test User

Account number 123456

Uploaded files:

https://cdn-eu.configura.com/live/ee49178ddd237c012fb860f2ea46fb5/BITS_log0.cmtxt

<https://cdn-eu.configura.com/live/ee49178ddd237c012fb860f2ea46fb5/CETDownloader.cmlog>

https://cdn-eu.configura.com/live/ee49178ddd237c012fb860f2ea46fb5/CETRenderServer_log0.cmtxt

https://cdn-eu.configura.com/live/ee49178ddd237c012fb860f2ea46fb5/CETRenderServer_log1.cmtxt

Note that if you change anything in this Description field it will also update the Description field in the Customer Portal.

Attachments

Any attachment that has been uploaded to an issue is found here.

Files and images can be attached to any issue in your project by **dragging and dropping files** onto the issue.

▼ Attachments

...

 Drop files to attach, or browse.

 test.cmdrw	10.60 MB	Just now
--	----------	----------

Activity

Here you can see all the activity on the issue:

Activity

All Comments Work Log History Activity Emails

JIRA Bot made changes - Just now

Field	Original Value	New Value
Reporter Email		no-reply@configura.com

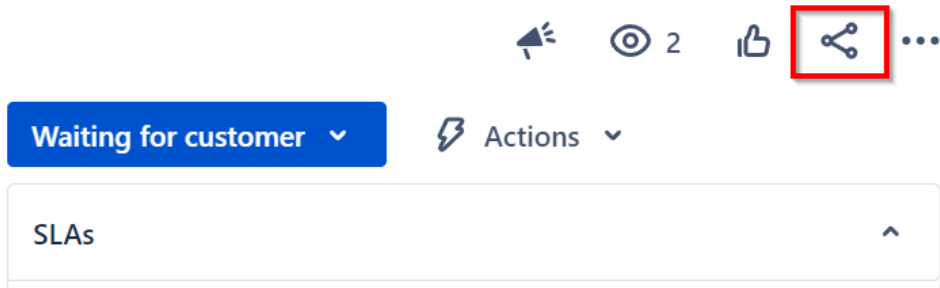
FIKA Support Person created issue - Just now

The Activity section is organized into the following headers:

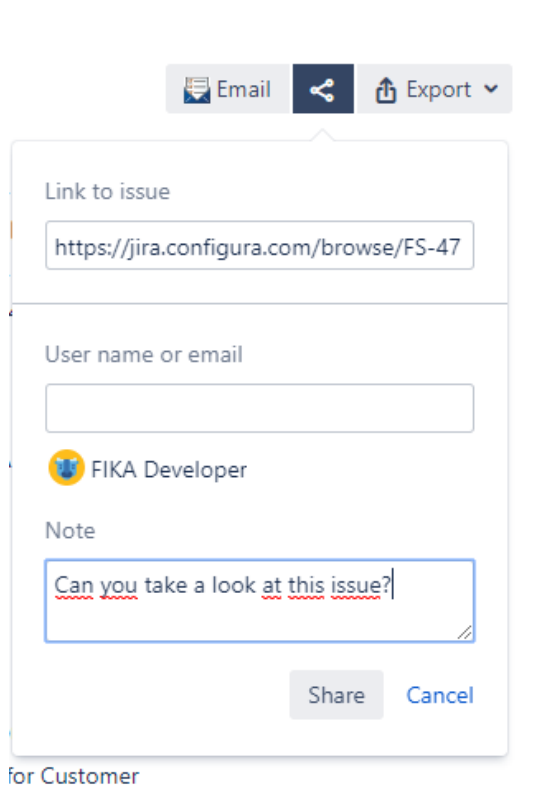
- **All:** Here you can see all activity on the issue.
- **Comments:** These are all comments that have been added to the issue.
- **Work Log:** Not being used.
- **History:** This tab records the following information:
 - creator of the issue (this may be the same as the reporter, but can be distinct)
 - changes to an issue field
 - attachment of a file
 - deletion of a comment
 - creation or deletion of an issue link.
- **Activity:** The **Activity** tab has the same information as the **History** tab, plus additional information, such as comments. However, this may load more slowly, especially if there has been a lot of activity on the issue.
- **Emails:** Here you can view emails that have been sent regarding the issue.

Share Button

To email a link to an issue to other JIRA users, use the **Share** button:



This feature also allows you to add an optional note to the email message.



for Customer

Watch Button

The **Watch** button allows you to add yourself or other Jira users to keep track of an issue:



For example, you might want Jira Software developers to help analyze a bug that a customer has reported. To involve internal users, add them as watchers. As watchers, they're notified about internal activity on an issue, and can communicate with you via internal comments.

Email notifications for issue activity

Send me email notifications



Get email updates for issue activity when:

You're **watching** the issue

Dates

Listed under the More fields section. Shows the issue was created and last updated:

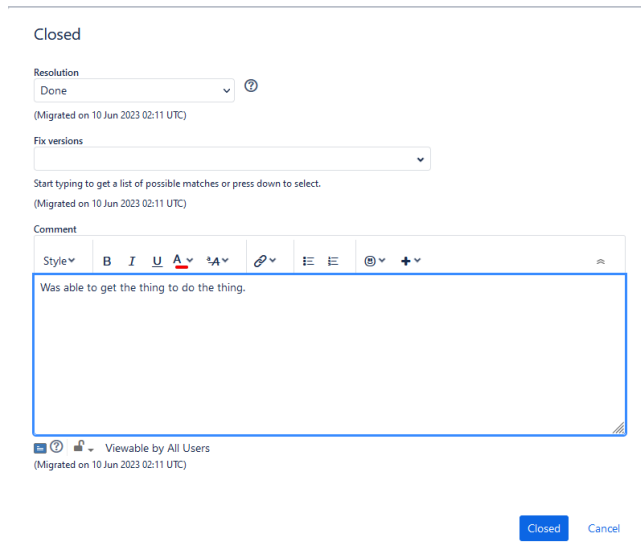
Created June 13, 2023 at 6:55 PM

Updated June 22, 2023 at 9:53 AM

Adding Comments to Issues

Comments can be added to an issue at any time, but could be especially important to add as a clarification when:


- Adding attachments (provide context)
- Closing / transitioning an issue (why is the status changing?)
- Linking issues (describe the relationship)



The screenshot shows a 'Closed' issue comment form. At the top, the status is 'Closed'. Below this, there is a 'Resolution' dropdown menu set to 'Done', with a help icon. A timestamp '(Migrated on 10 Jun 2023 02:11 UTC)' is visible. Underneath is a 'Fix versions' dropdown menu. A note says 'Start typing to get a list of possible matches or press down to select.' followed by another timestamp '(Migrated on 10 Jun 2023 02:11 UTC)'. The 'Comment' section features a rich text editor with a toolbar containing icons for bold, italic, underline, text color, background color, link, unlink, list, and list group, along with an @-mention icon and a plus sign. The text area contains the comment: 'Was able to get the thing to do the thing.' Below the text area, there is a visibility icon and a dropdown menu set to 'Viewable by All Users', with a timestamp '(Migrated on 10 Jun 2023 02:11 UTC)'. At the bottom right, there are 'Closed' and 'Cancel' buttons.

Comments can ONLY be internal. You automatically become a watcher of the issues you comment on, or otherwise interact with, but this can be changed in your Settings.

Watch your issues

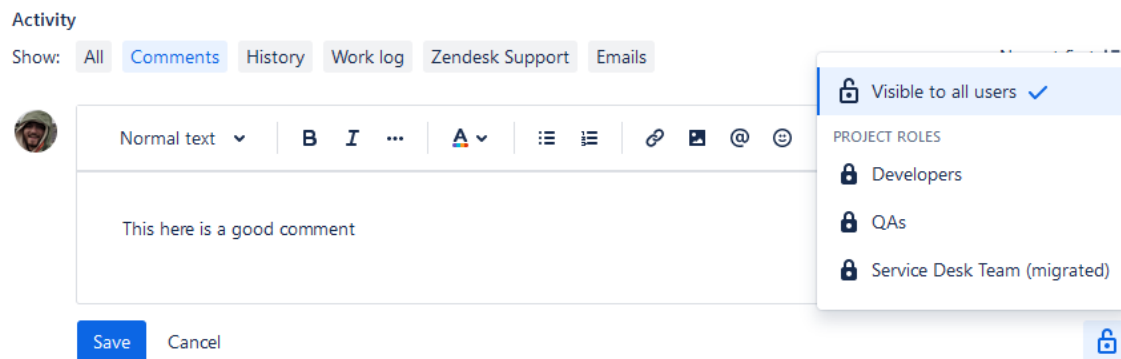


The screenshot shows a dropdown menu for 'Watch your issues' with the current selection set to 'Disabled'.

If you select enabled, you will automatically 'watch' the issues you interact with.

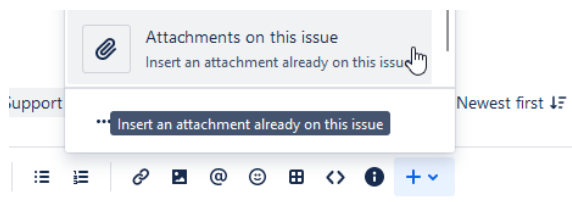
How to Add a Comment

You write your comment in the comment field:



At the bottom, visibility can be set to restrict visibility. By Default, your comment is Visible to all users who can access this Jira issue.

Note: If you wish to add an Attachment, you must do this by dragging and dropping the file onto your ticket. After the attachment is uploaded, it will be possible to embed into a comment (such as an image or video.)

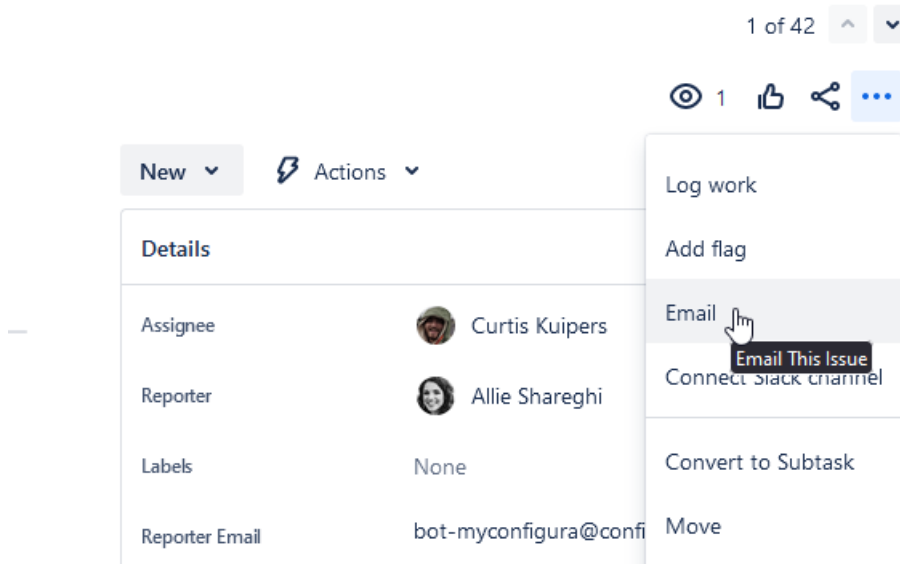


You can use @mentions (i.e. @username) to mention a team member in a comment. That team member will then receive an email notification.

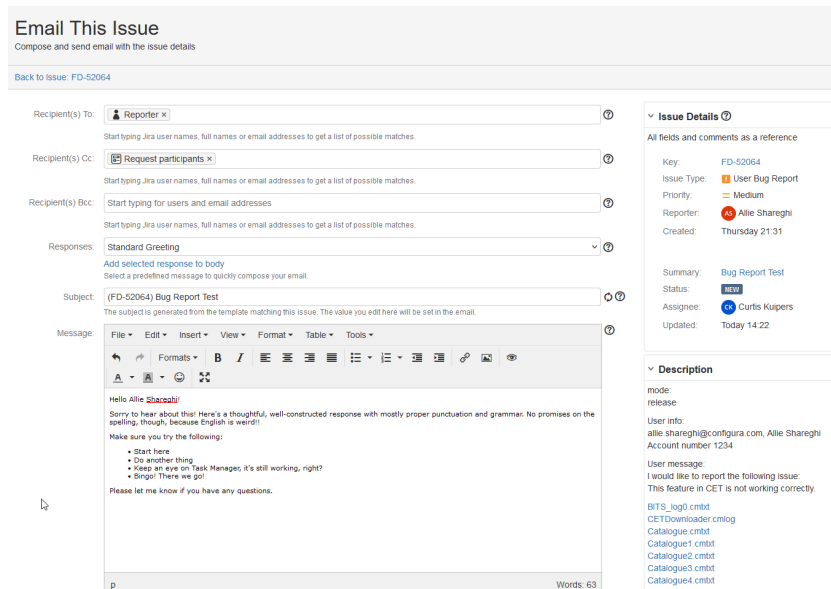
Contacting the User

Since users will not have access to the ticket system in this setup, it is imperative to have good communication with them regarding the status and expectations of their tickets.

You will use “Email This User” to establish contact with the user. Here is their full documentation page: <https://docs.meta-inf.hu/email-this-issue/master>



You can compose a message to the user, including some quick Responses you can insert for commonly used expressions.




Sending a message to the user via Email This Issue will result in two further actions:


1. The ticket will receive a comment including the email you’ve sent from the ticket.
2. The ticket will transition to **More Info Needed**

Note: If you simply needed to write the user without changing the status, don’t worry, you can transition the ticket back to its previous status afterwards.


This is an example of how an interaction would automatically change status and appear in your project. Notice how the status changes follow the comments.

 Allie Shareghi added an Attachment December 6, 2023 at 7:10 PM **HISTORY**
None → Email Example - (FD-52061) Test User Feature Request.msg

 Automation for Jira changed the Status December 6, 2023 at 6:53 PM **HISTORY**
MORE INFO NEEDED (VERIFICATION) → **MORE INFO ADDED (VERIFICATION)**

 Allie Shareghi added a Comment December 6, 2023 at 6:53 PM **COMMENTS**
This is a reply to the email sent from Jira. I sent this from my email client as if I was emailing an individual person. It will be added to the comment field.

Allie Shareghi	
Program Manager of User Support	
Customer Success	

From: JiraSandbox <jirasandbox@jira.configura.com>
Sent: Wednesday, December 6, 2023 12:49 PM
To: Allie Shareghi <allie.shareghi@configura.com>
Subject: ( [FD-52061: Test User Feature Request](#) **MORE INFO ADDED (VERIFICATION)**) Test User Feature Request

 Automation for Jira changed the Status December 6, 2023 at 6:48 PM **HISTORY**
NEW → **MORE INFO NEEDED (VERIFICATION)**

 Allie Shareghi added a Comment December 6, 2023 at 6:48 PM **COMMENTS**
Time sent: **December 6, 2023 5:48:56 PM UTC** - To: **allie.shareghi@configura.com - (FD-52061) Test User Feature Request**

Hello Allie Shareghi!
