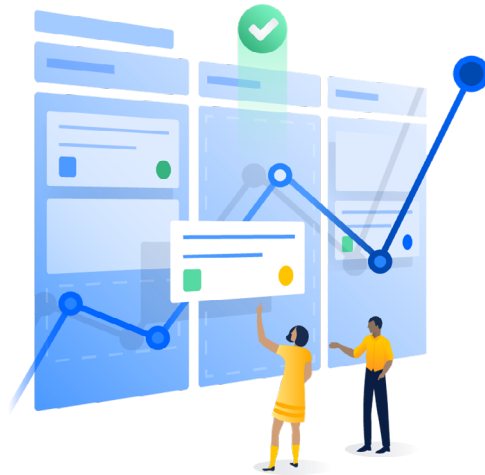ATLASSIAN

Be a Jira Hero

A guide for Admins, by Admins

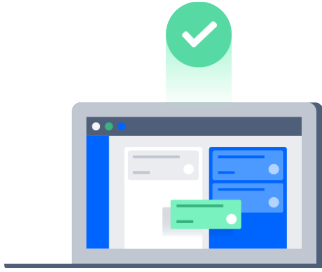**FUTURE-PROOF YOUR TEAM'S WORKFLOW**

Once upon a time, companies with a predominantly remote workforce were somewhat of a rarity. Fast forward to early 2020, and remote work is suddenly the new normal, and as this guide goes to print, there's no end in sight. Teams are still adapting and finding new ways to work together – while physically apart. There's a lot of uncertainty, but one constant is Jira Software's ability to connect teams and move work forward, regardless of changing team dynamics.

Getting started in Jira can be a breeze, but as teams grow, mature, and evolve, work becomes more complex. Throw in unexpected world events and this is exactly when Jira Software steps up and really flexes its proverbial muscle.

That's why we put together this guide full of tips and tricks – curated from actual, real-life Jira admins – to future-proof your team's workflow. Whether you're a seasoned Jira admin or signing up for the very first time, these best practices, tips, and shortcuts aim to help you setup and maintain the most powerful Jira instance possible. Are you nervous to experiment in a live Jira instance? Remember, you can now use Jira Software Cloud for free, forever: sign up now. Consider it your team's free cloud sandbox! Now, onto the tips and tricks!

Table of Contents

01

Keeping Jira clean and simple for your users

1 **Understand your users' behavior.**

Before you start to customize Jira, it's important to observe what your users are doing day-to-day and identify challenges that Jira could solve. For example, do you see someone trying to run a process from a spreadsheet or an email? Offer to understand the use case and replicate the process in Jira. Moving project management away from spreadsheets and into Jira is a great first step to making work more streamlined and efficient.

2 **Set some time for weekly maintenance.**

Put some time on the calendar to make sure all active issues are understandable and there aren't duplicates (or ensure your scrum master and/or product manager does!)

3 Simplicity is key. Reuse as much as you can.

Beware of over-customizing Jira when creating new, one-off fields: set the field context to keep its purpose clear to users, and ensure it's only visible to the project(s) that need it.
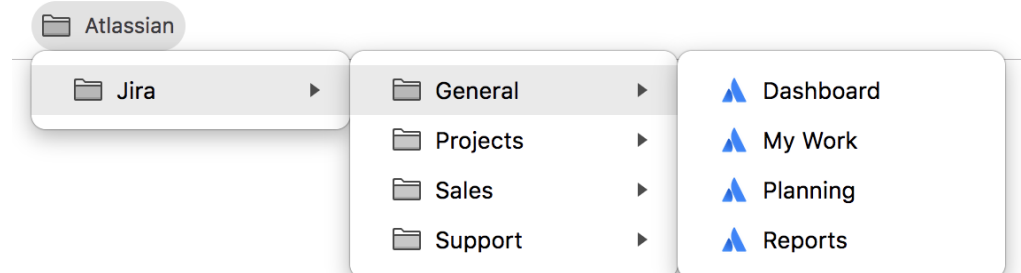
4 Make Jira a place people want to visit.

Encourage your users to spend time in Jira by creating an appealing interface. Find good icons and set your corporate colors so Jira feels familiar.

5 Bookmark your most important screens.

CLOUD ONLY

In your web browser, star the screens you visit the most so they're only a click or two away. Encourage your users to the same so they won't lose track of their boards.

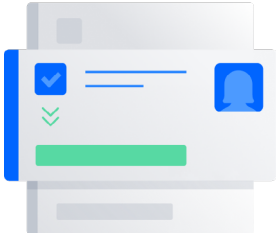| 📁 Atlassian			
📁 Jira ▶	📁 General ▶	🔺 Dashboard	
	📁 Projects ▶	🔺 My Work	
	📁 Sales ▶	🔺 Planning	
	📁 Support ▶	🔺 Reports	

Home sweet home!

Tip #4   **Make Jira a place people want to visit.**

Encourage your users to spend time in Jira by creating an appealing interface. Find good icons and set your corporate colors so Jira feels familiar.

02

Issues: we've all got 'em

6 **Keep the issue summary and description fields as concise as possible.**

Seriously, relevant info only.

7 **Use keywords in the description field.**

You should still use relevant Jira fields where possible, but using keywords in the description field makes the issue easier to search. You should also incorporate important points from comments to the description field - this makes it easier for all team members involved.

8 **Always assign dates to issues.**

This helps with search and makes identifying stale issues easier. For non-tech projects that require multiple dates, timelines can be easily prioritized, managed, and reminded upon (Notification Assistant is great for this).

USE KEYWORDS
in project
descriptions

Tip #7

You should still use relevant Jira fields where possible, but using keywords in the description field makes the issue easier to search. You should also incorporate important points from comments to the description field – this makes it easier for all team members involved.
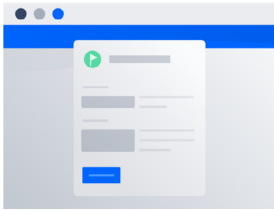
9 Use links.

Be sure to assign the correct link type. Links allow you to connect and maintain visibility across the various efforts related to a single project.

10 Ensure sub-tasks are complete.

Setup approvals for subtasks to prevent users from moving tasks to done until all subtasks are complete.

# 03

Custom fields & screens: less is more

11 Resist the urge to add multiple issue fields and integrations.

Adding too many issue fields makes Jira run slower, more difficult to manage, and not fun to work with for users (or admins!). Discipline here will earn you major user-friendliness points.

12 **Repurpose general-use fields.**

When starting a new project, rather than creating a very specific field that is only used once, reuse an existing general-use field. Try creating a threshold for adding new custom fields (for example, if you think it will be used in at least 20% of issues). Don't be afraid to ask users, "what do you intend to do with that field?"
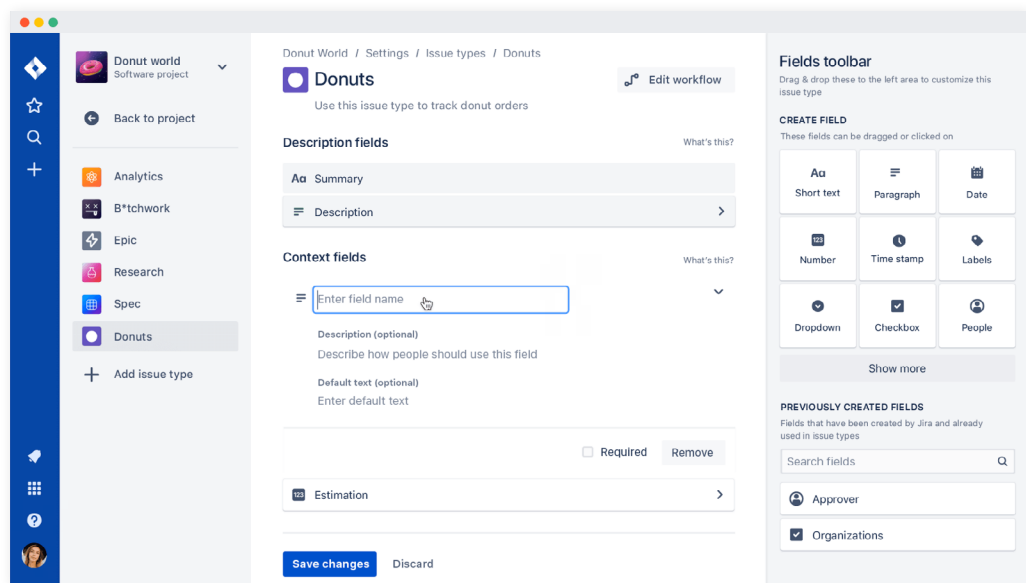
13 **Use tabs to group related fields.**

Aim to place less-used fields onto separate tabs. You can also add, remove, rename, and reorder tabs.

14 **Create screens for specific points in the user flow.**

Assign screens at important transition points that prompt users to enter information at specific points in time. While not all fields need to be mandatory, these offer an opportunity to remind users to input relevant information (rather than randomly in the future).

+

Do you need a custom field for every new project?
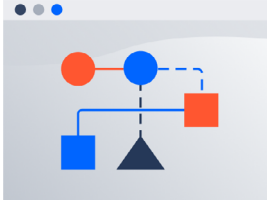
Tip #12

Repurpose general-use fields.

When starting a new project, rather than creating a very specific field that is only used once, reuse an existing general-use field. Try creating a threshold for adding new custom fields (for example, if you think it will be used in at least 20% of issues). Don't be afraid to ask users, "what do you intend to do with that field?"

04

Workflows

15   Answer these questions first:

What are you trying to accomplish? Who is the audience? What can streamline your experience? It may sound basic, but answering these questions will help you over the long run. You can start with a MVP board and build from there.

16   No one project fits all.

Boards are only as important as the information you put into them. If you're strategic about the information you add it will pay dividends later. If you'd like to make a change to your board process, try A/B testing the old board vs. your new board.

17   Custom workflows: focus on the user

The default workflow is designed for general purpose tasks but you'll find it very convenient to map every relevant status for your team's unique process.

Also, this allows you to introduce conditions to execute transitions (such as approvals, validations) and automate what happens after a transition (post-functions).

> **PRO TIP** | Add a date/time field that autofills on transition since it allows you to export that field to any report you might need later.

18 Keep workflows simple for the user.

As an admin, you should provide workflows with as many functionalities as needed - without overcomplicating things. Create workflows that show different routes for:

- Different users based on the user permissions.
- Values that are introduced during the life of the issue.
- Time elapsed.
- Responses received from other systems.
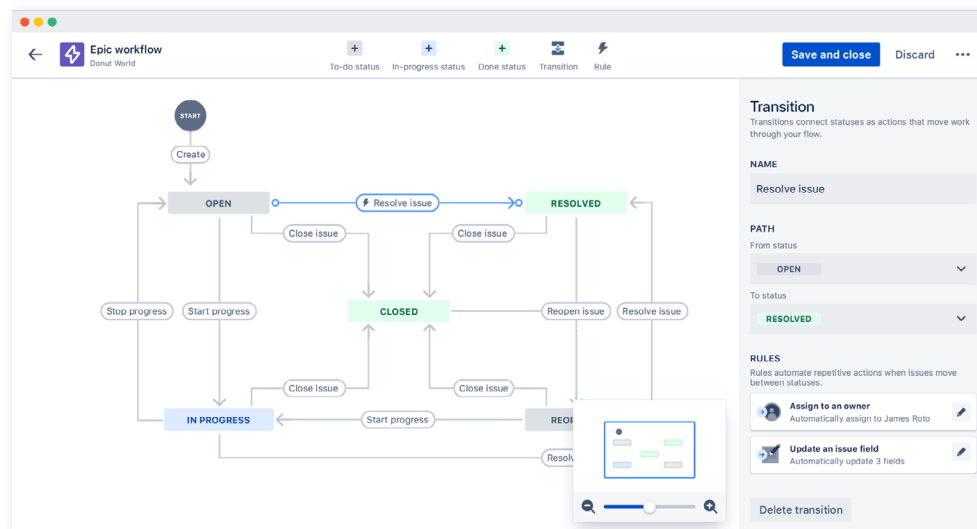
19 Use transitions in workflows.

Instead of adding extra status steps, use transitions and recognize the difference in the process of mapping workflow.

KEEP

WORKFLOWS

SIMPLE
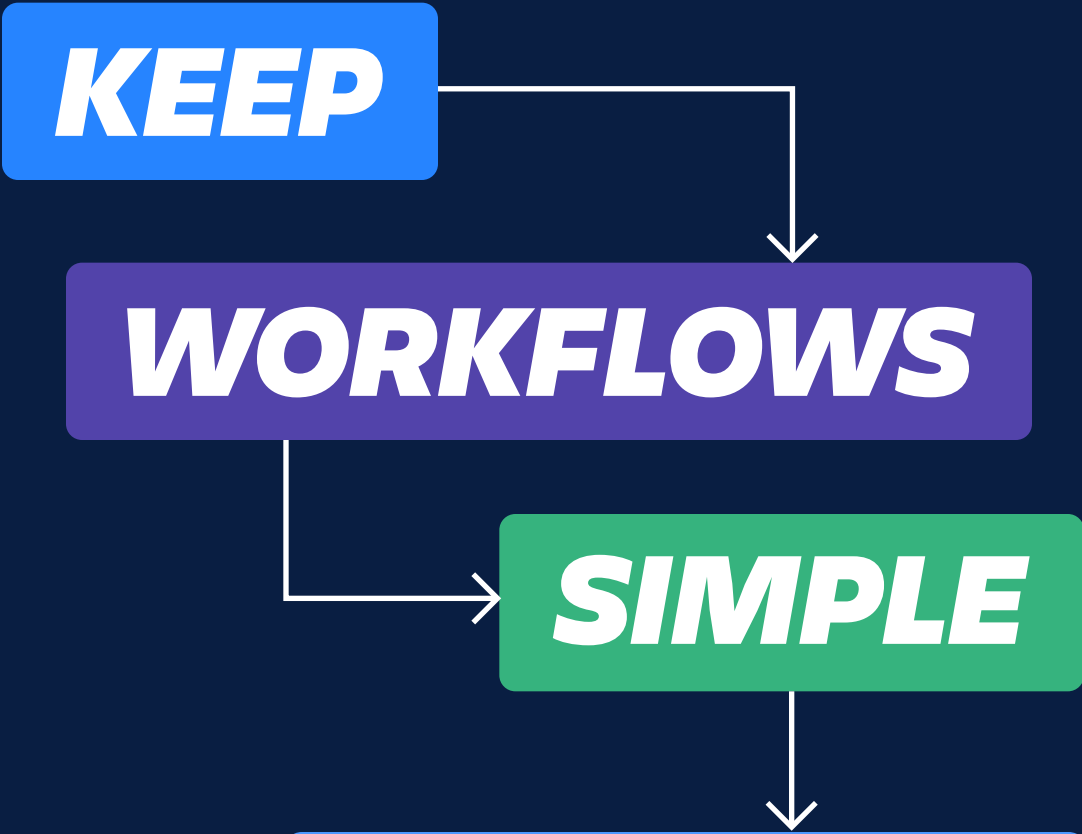
Tip #18

Some ideas: create routes for time elapsed, responses received from other systems, or values being introduced during the life of the issue.

20 Incorporate Resolution into your workflows.

Use a post-function to set the Resolution when transition to Done. Ensure a resolution is set on the final step or you'll end up with issues that are Done but not resolved. Present the field in a transition screen for selection.

21 Consider versioning workflows.

When creating and updating workflows, consider versioning them. Why?

1. If there are many interrelated changes to make, you can complete them and apply them all at once.

2. Perhaps more importantly, if something bad happens, you can very quickly roll back to the previous version.

Keep it simple and don't feel compelled to update the version with every small change. But if there's a substantial workflow change, here's what you can do:

• Copy the current workflow and give it a new version (major if a huge re-write, minor if adding more than a few changes/features).

• Make changes to the new version that is not yet in production.

• Replace the old workflow with the new one when ready. However, if you have automatic transitions and they're looking for a transition in a named workflow – they might break. Read more here.
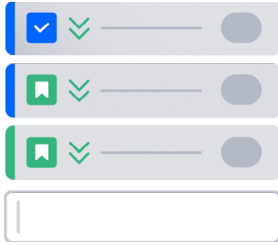
05

Backlog

22 **Apply version and epic assignments on backlog items first.**

This can be an arduous task in the future if done incorrectly.

23 **Use the right-click on the Backlog and use the "Send to:" function:**

- Send an issue to the top of the Backlog or to the current sprint.

- Split an issue.

- Perform a bulk change (you can select multiple issues using Shift or CTRL).

06

People & permissions

24   **Make use of Filter Subscriptions**

Remind users of due dates or other important updates so tasks don't fall through the cracks.

25   **Send notifications strategically**

Send notifications only if action is required or as a summary of a completed complex action. Format these alerts differently so it's very clear when an action is required.

07

JQL, reporting & dashboards

26 **Specify criteria you can't define in quick or basic searches**

Jira Query Language (JQL) is an advanced search that allows you to specify criteria that you can't define in quick or basic searches. It's a powerful skill for every Jira admin. For even more JQL tips, check out this blog.

> **Got some JQL knowledge under your belt?**
> Use the custom filter results gadget to display the results of a specified filter on a dashboard.

27 **Use and manage issue filters to create digestible dashboards**

• Design several custom JQL searches that return the different set of issues various teams will find useful.

• Use JQL to narrow your search results and ensure you have the relevant fields on display. From there, you can bring them into your dashboards to report a multitude of information in various ways.

For example:

You can create a two-dimensional chart of issues completed by application (a custom field), and show it graphically with a pie chart – which makes it easier for management teams to understand and act on.

- Focus on the most important columns to show. Custom fields will help with this.

28 **Find a layout that works for you.**

Experiment with the layout of your dashboard to find the most efficient way to consume the information.

A peek into one admin's dashboard layout: "I find the most useful configuration to be 2 columns: the main one contains filters and timesheet reports. On the right are the small bubble graphs and piecharts. The best placement for the bi-dimensional filter depends on the number of categories you expect the results to fall in (if there are just a couple of categories the small right column might be a good fit, otherwise the main one)."

29 **Create customized dashboards for users with different needs**

Showing different groups the information that matters most to them is a great play to win user satisfaction points!

> **PRO TIP** Save time by copying custom dashboards so you don't have to start from scratch.

30 **Timing is everything.**

How often you check your reports largely depends on your team's goals and priorities. For example, a support team may want to refresh their reports more often to track the status of their tickets and ensure no ticket goes unassigned. Otherwise, pulling the data when you open your dashboard should be fine.

31 **Don't force reporting in Jira if it gets too complex.**

Jira macros in Confluence (sometimes embedded in other macros) allow reporting and documentation to presented in context. This also allows for conversation and analysis to occur around the report being shared.

32 **Save time with Saved Reports.**

Use the Saved Reports function to find reports you look at frequently.

08

Shortcuts and hacks

33 **Press 'G' twice on keyboard for a menu search.**

You can use this search for specific admin pages, like global mail settings, Lexorank, design settings, and more! It can also be used on an issue details page to see actions you can take, like edit, transition, comment, etc.

34 **Get a full menu of Jira shortcuts**

Press '?' anywhere on your Jira Cloud screen to see a menu of all shortcuts.

Global shortcuts

Starred and recent	\	Keyboard shortcuts	?	
Quick search	/	Find issues	g then i	
Close drawer	Esc	Browse to a project	g then p	
Create issue	c	Toggle sidebar	[	

Navigating issues

View selected issue	o or ↵		Next activity	n
Next issue	j		Previous activity	p
Previous issue	k		Focus search field	f
Search for issues	u		Switch filter view	t
Toggle issue fullscreen	z		Detail view order by	y
Dock/undock filters panel	[			

Issue actions

Edit issue	e		Share issue	s
Assign issue	a		Edit issue labels	l
Comment on issue	m		Jump to field for editing	,
Watch issue	w		Assign to me	i

Board shortcuts

Backlog	1		Next column	n
Active sprints/KB board	2		Previous column	p
Reports	3		Toggle all swimlanes	-
Hide/show menus	z		Send to top	s then t
Hide/show detail view	t		Send to bottom	s then b

Service desk

View selected issue	o or ↵
Next issue	j
Previous issue	k

SHORTCUTS

WE HAVE A TON!

Tip #31   Don't force reporting in Jira if it gets too complex.

Jira macros in Confluence (sometimes embedded in other macros) allow reporting and documentation to presented in context. This also allows for conversation and analysis to occur around the report being shared.

09

Automation

Add automation to Jira with just a few clicks.
Learn how.

35 **Create recurring activities on a schedule.**

Make sure important milestones within issues don't fall through the cracks.

36 **Keep parent and sub-task issues in sync.**

Keep your boards tidy. For instance, when a user resolves the last sub-task on an issue, you can automatically resolve the parent. Watch the video.

37 **Auto-assign issues to your team.**

Make sure work gets completed in a timely manner by setting up an automatic allocation process. Watch the video.

> **BONUS TIP!**
>
> Automation is free for every Jira cloud user and works across all Jira products (it also connects your git tools like BitBucket, GitHub and GitLab). Watch the 'getting started' webinar here.

10

## Roadmaps

38 **Work directly from the roadmap.**

Start creating epics and child issues right from the roadmap. Working in classic project templates? Simply enable roadmaps!

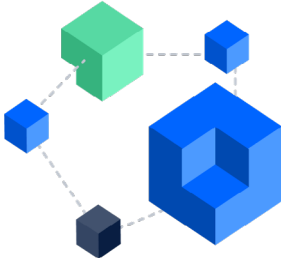**39** **Keep your roadmap lean and organized.**

Declutter your roadmap using the new view settings panel to remove old or completed epics.

40 **Quickly change colors on the roadmap.**

Right click on the epic bars to quickly change the color, rather than going into settings.

BONUS TIP!

Embed live Jira Software roadmaps into Confluence with the Jira roadmap macro.
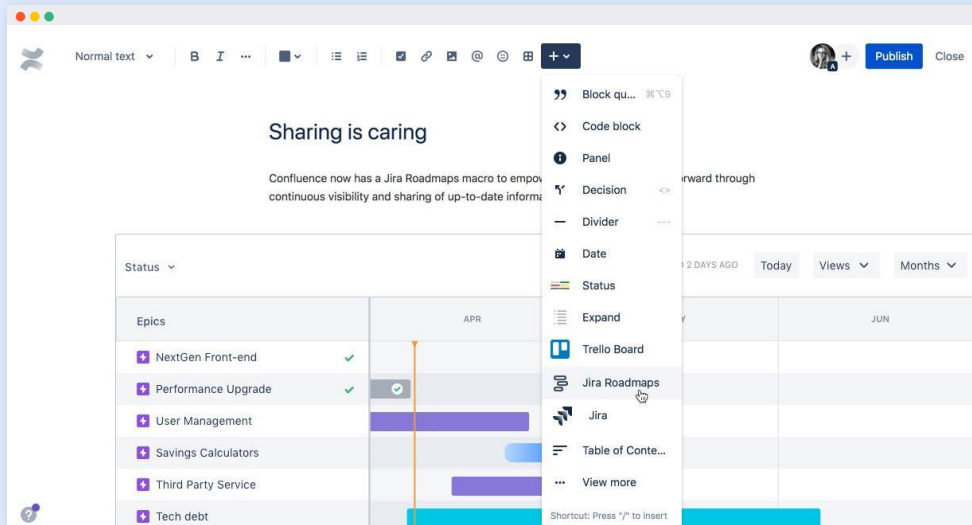
11

App recommendations

These app recommendations came directly from our Community members:

Notfications

Add Notification Assistant that helps make targeted, automated, and/or time delayed "reminder" emails.

Slack

Keep conversations going and reach people quickly with Slack.

JQL

Expand the capabilities of standard JQL with JQL Booster Pack.

JSU Automation Suite for Jira Workflows

Create more post function options for transitions with JSU Automation Suite for Jira Workflows and Workflow Enhancer for Jira.

Custom fields

Create "power fields" with SIL customFields. This is a field where you can write your own code, having into account multiple variables related to not only issues but also your Jira instance and it returns the corresponding result.

Please vet all apps before installing to ensure each is compatible with your version of Jira. Thoroughly read through other users' reviews with an eye toward red flags or support issues, and review the vendor's support policy to ensure it will meet your expectations based on business criticality of your Atlassian tools.

Hungry for more Jira tips?

Here are three options to keep the conversation going.

1. Meet other Jira heroes in your area at an
    Atlassian Community Event (ACE).

2. Learn more from our massive online Community.

3. Add your own Jira tip on the original Atlassian
    Community post.

ATLASSIAN