

Complete Guide to Jira Administration: Configuration, Management, and Automation

with Rachel Wright



Jira Jargon

Important terms and definitions

Terminology Changes

Current	Previous
Jira	Jira Software and Jira Work Management
Jira Service Management (JSM)	Jira Service Desk (JSD)
Cloud: Work, Work items Server and Data Center: Issues (No change)	Cloud: Issues Server and Data Center: Issues (No change)
Work types	Issue types
Work type schemes	Issue type schemes
Work type screen schemes	Issue type screen schemes
Apps (E.g., Marketplace apps)	Add-ons, plugins
Apps (E.g., Atlassian apps like Jira)	Products
Atlassian Learning	Atlassian University
Atlassian Community Forums	Atlassian Community

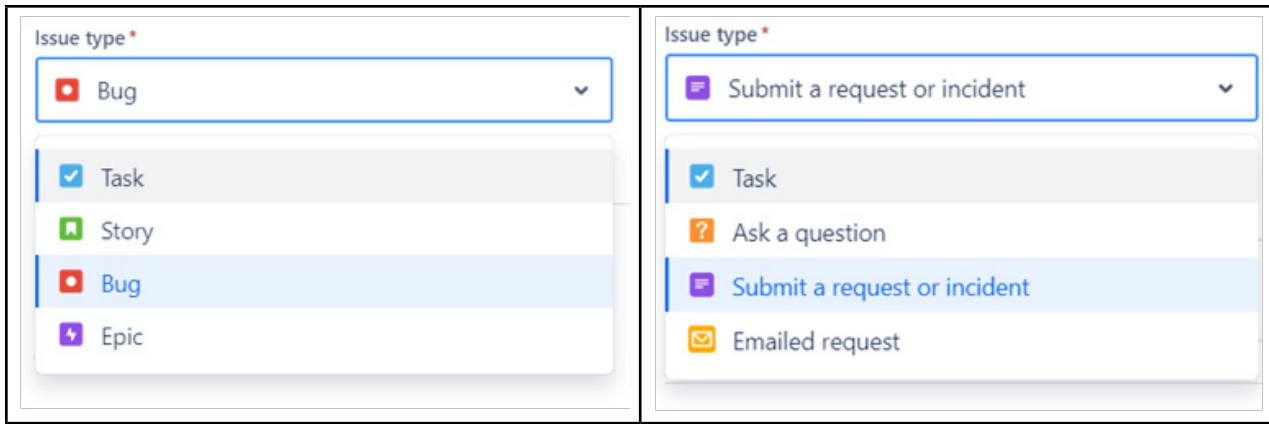
Jira Terms

Work item, Issue – an individual item in Jira

Each time you create an item, you create a new work item or issue with a unique key to identify it. A work item or issue is any individual record in the Jira database.

Work type (Cloud), **Issue type** (Server and Data Center) – a classification of work items in a Jira project

Example: Task, Sub-task, Epic, Story, Bug, Service Request, Change Request, and more. Each Jira project can have its own set of issue types, based on the type of work done.



Common Work Types and Issue Types

Business Jira Projects	Software Jira Projects	Service Jira Projects
<ul style="list-style-type: none"> • Task • Sub-task • And more 	<ul style="list-style-type: none"> • Epic • Bug • Story • And more 	<ul style="list-style-type: none"> • Service Request • Change Request • Incident • And more

Project – a collection of Jira work items

The word “project” in Jira is different than an initiative your team is working on outside of Jira. Think of a Jira project as a container for all your team’s initiatives, tasks, and “to do” items. There is generally one Jira project per department, system, team, or application. Example: A Jira project called “Offshore Development” tracks contracted features, bug fixes, and maintenance work.

PROJECT TYPES	
Cloud The Cloud project types are business, software, Jira Service Management, and Jira Product Discovery.	Server and Data Center The Server and Data Center project types are software, service, and business.
Cloud also has company-managed and team-managed project types. <ul style="list-style-type: none"> • Company-managed projects use schemes that are managed by Jira administrators • Team-managed projects are scheme-less and are managed by regular users 	

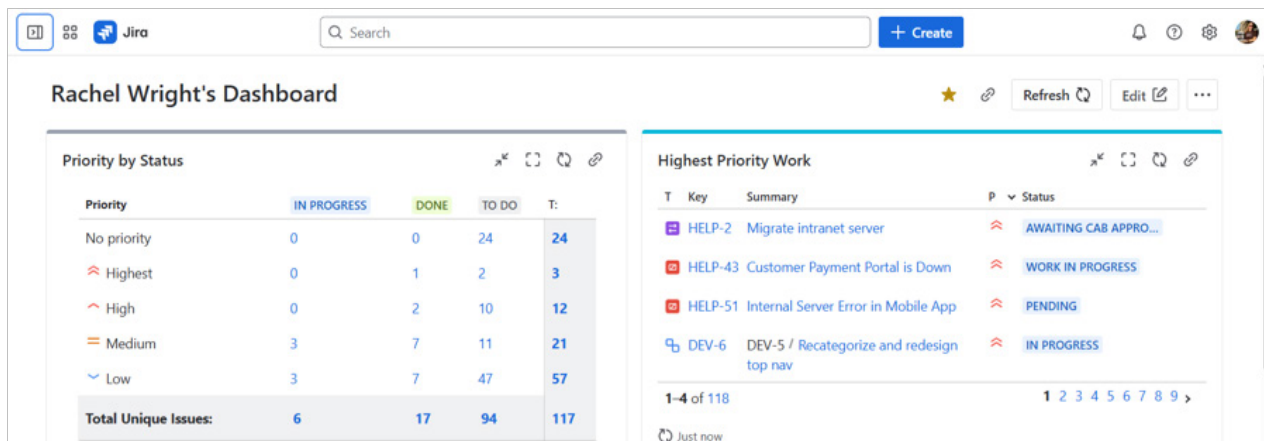
Query – a question used to search the Jira database for work items that match your specifications

JQL – Jira Query Language

Filter – a saved search

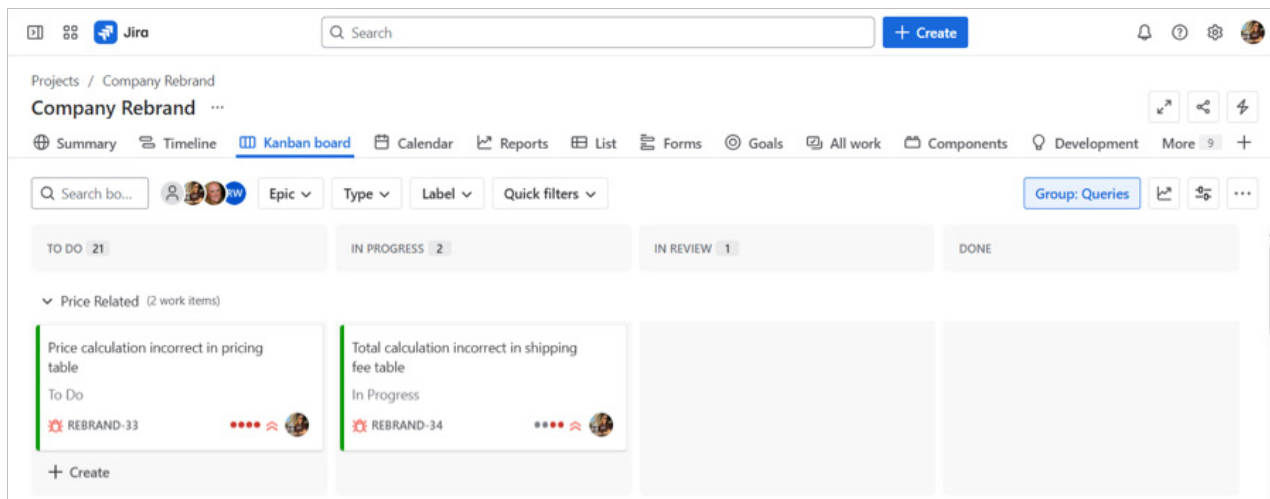
Dashboard – a statistics-based view of work items

A Dashboard is a statistics-based view of work items. Dashboards are powered by one or more JQL filters.



Gadget – dynamic dashboard content blocks gadgets like charts, graphs, and lists

Board – a status-based view of work items



Scrum – boards for work delivered at intervals called Sprints. Example: Every two weeks

Kanban – boards for work delivered continuously




Swimlane – a horizontal grouping of work items on a board

Quick filter – a one-click segmenting function on a board

Version – a grouping of work items deployed together in a software release

Tom Preston-Werner, inventor of Gravatar and cofounder of GitHub, created “The Semantic Versioning” specification. This is a recommendation for naming versions in the format: MAJOR dot MINOR dot PATCH. E.g., 1.0.0. Read more: <https://semver.org>

Component – provides a categorization method with auto-assignment capabilities

Component :	Description :	Component lead :	Default assignee	Issues :	
Nav Change	Navigation, sub-nav, footer, and sitemaps	 Rachel Wright	Component lead	2 issues	...
Misc files	docx, pdf, xlsx, and other downloadable files		Project default	0 issues	...
Images	png, svg, and ico files	 Rachel Wright	Component lead	0 issues	...
Copy Change			Unassigned	3 issues	...
Code Change	css, html, php, xml files	 Rachel Wright	Component lead	2 issues	...

Jira Setting Terms

Scheme – a configuration or collection of settings

A scheme allows you to use settings differently in the same Jira project or share settings between multiple projects. Schemes only apply to company-managed projects in Cloud and all projects in Server and Data Center.





Projects / HR Requests / Project settings

Workflows

Jira Service Management IT Support Workflow Scheme generated for Project HRR

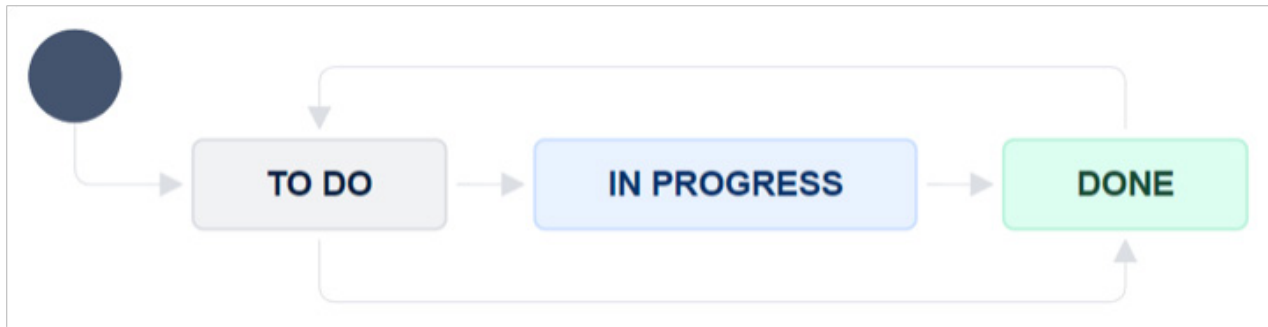
Add Workflow ▾

Switch Scheme

Workflow	Issue Types	Actions
HRR: Default ESM workflow for Jira Service Management (View as text / diagram)	<div><div>Employee offboarding</div><div>Employee onboarding (Assign)</div></div>	 
HRR: Jira Service Management default workflow (View as text / diagram)	<div><div>Task</div><div>Sub-task (Assign)</div></div>	 

Workflow – a sequence of life cycle steps to reach a goal

A workflow is a visual representation of a process. It contains a sequence of standard steps, called statuses, that each issue must go through to be completed.



Workflow scheme – a mapping of workflows to issue types

Workflow status – an issue’s current state

Workflow transition – forward or backward movement between statuses

Global transition – moving from any status to any other status

Workflow behavior – an action before, during, or after a transition

Atlassian sometimes calls these “rules” or “workflow extensions”. Examples: “Only assignee” condition, “Field required” validator, etc.

Workflow trigger – a method to transition work items from development tools

Workflow condition – checks whether a transition can be performed by a user

IN REVIEW → Done → DONE

Screen: Resolve Issue Screen

Triggers 0 Conditions 2 Validators 0 Post Functions 5

Any of the following conditions ▾ [Add condition](#)

- Only users in group **QA Team** can execute this transition.
- Only users in project role **Administrators** can execute this transition.

Workflow validator – checks that data is valid before a transition occurs

Triggers 1 Conditions 0 Validators 2 Post Functions 5

The transition requires the following criteria to be valid [Add validator](#)

- If a value for field **Original estimate** is not provided during the transition, show the following error: **This field is required.**
- If a value for field **Due date** is not provided during the transition, show the following error: **This field is required.**

Custom fields

You currently have **146** active custom fields

Create custom field

Active

Trashed

total

Name :	Type	Screens and contexts :	Projects :	Last used : ?
Total Expenses	123 Number Field	3 screens, 1 context	1 project	Sep 18, 2023 ...
Total Risk	123 Number Field	1 screen, 1 context	1 project	Feb 9, 2023 ...

Custom field context – determines field use and visibility

Field configuration – defines standard and custom field behavior

Field configuration scheme – maps field configurations to issue types

Screen – defines fields shown and their display order

Screens allow administrators to define when standard and custom fields are shown.

Screen scheme – an association of screens with issue actions. E.g., Create, edit, and view

▼

HELP: Jira Service Desk: Change Management Screen Scheme

This issue type...

...uses this screen scheme

Change

Operation

Screen

Create issue

HELP: Jira Service Desk: Change Create Issue Screen

Edit issue

HELP: Jira Service Desk: Change View/Edit Screen

View issue

HELP: Jira Service Desk: Change View/Edit Screen

Issue type screen scheme – an association of screen schemes with different issue types

Issue type scheme – a group of issue types

Scheme:

ACQ: Scrum Issue Type Scheme

Bug

Epic

Story

Sub-task

Task

SUB-TASK

Priority – a relative ranking of severity or importance. Example: Low, Medium, High

Priority Scheme – a group of priorities

Permission scheme – defines project permissions

Issue security scheme – settings to control access at the issue level

Notification scheme – settings for email messages sent at issue lifecycle events. E.g., Issue created, Issue updated, Issue assigned

Custom event – an additional alert that something has happened. E.g., Issue ready for code review, change ready for verification, approval is needed

Development Terms

Agile – the ability to move quickly and respond to change

DevOps – collaboration between development and operations

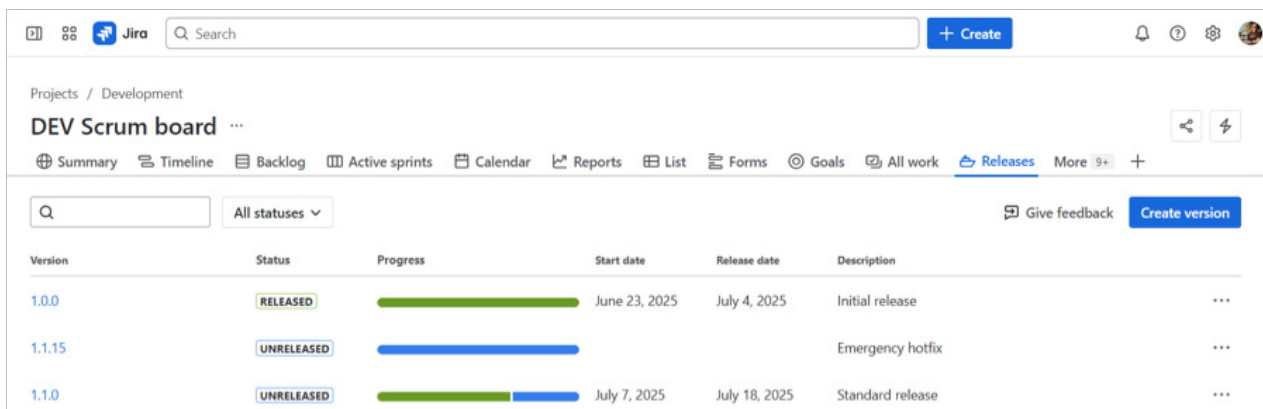
Backlog – a collection of unprioritized work

Sprint – a time-boxed iteration of rapid work

Fix version – represents a specific release

Affects version – represents where a bug is found

Release hub – provides an overview of work items in a version

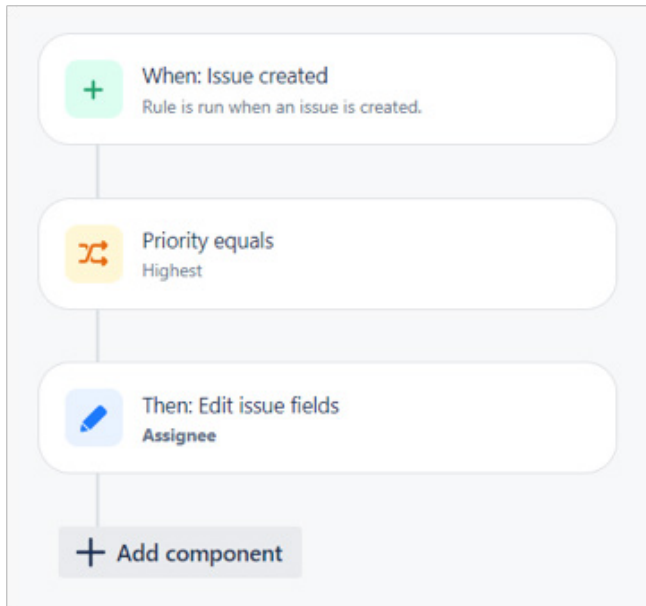


Version	Status	Progress	Start date	Release date	Description
1.0.0	RELEASED	<div></div>	June 23, 2025	July 4, 2025	Initial release
1.1.15	UNRELEASED	<div></div>			Emergency hotfix
1.1.0	UNRELEASED	<div></div>	July 7, 2025	July 18, 2025	Standard release

Extending Jira Terms

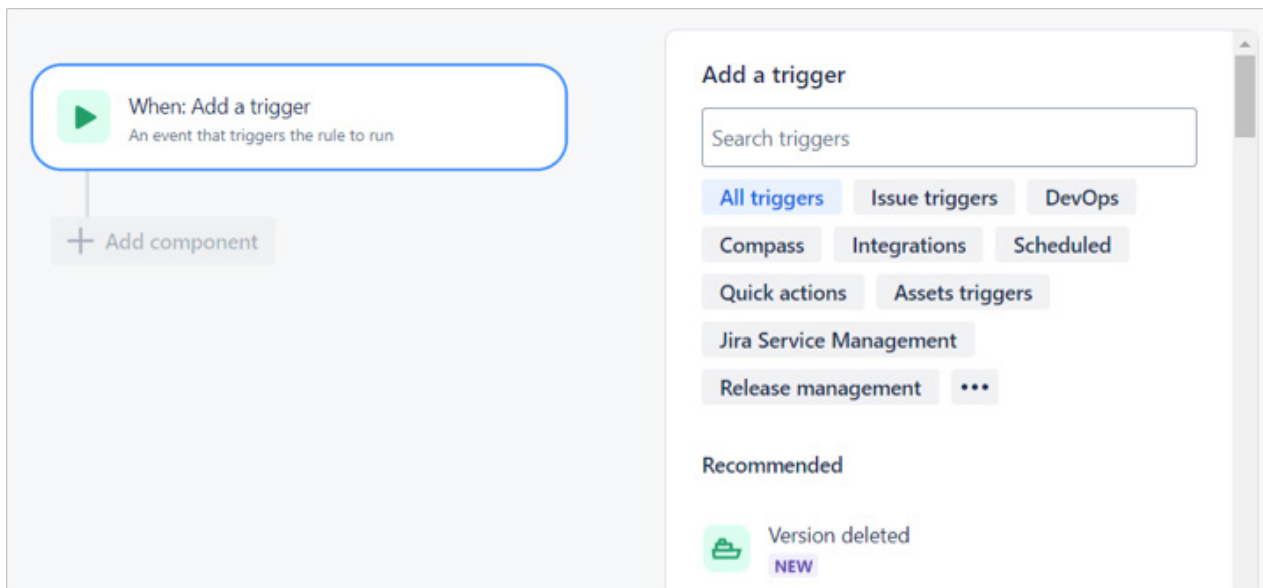
Automation – making equipment, a process, or a system operate automatically

For example, when an issue is created, if the priority equals “highest”, then edit the assignee field.



Automation rule – repeatable, criteria-based actions

Automation trigger – activates a rule



Automation condition – defines rule scope

The screenshot shows the Jira Automation interface. On the left, a rule is being configured with two components: 'When: Issue created' (Rule is run when an issue is created.) and 'If: Add a condition' (Narrows the scope to specific user groups, etc.). Below these is a '+ Add component' button. On the right, the 'Add a condition' panel is open, showing a trash icon at the top right. Under 'Recommended', there is an 'Issue fields condition' with a 'POPULAR' tag. Under 'All components', there are four options: '{{smart values}} condition', 'Affected services condition', and 'AQL condition'.

Automation branch – applies conditions and actions to related work items or objects

The screenshot shows the Jira Automation interface. On the left, a rule is being configured with two components: 'When: Issue created' (Rule is run when an issue is created.) and 'For each: Add a branch' (Apply conditions and actions to the object defined by this branch). Below these is a '+ Add component' button. On the right, the 'Add a branch' panel is open, showing a trash icon at the top right. It lists three options: 'Advanced branching', 'Branch on AQL', and 'Branch rule / related issues'. At the bottom, there is a link: '> Get automation tips from the community'.

Automation action – defines activities performed

The screenshot shows the Jira Automation interface. On the left, a rule is being configured with two components: 'When: Issue created' (Rule is run when an issue is created.) and 'Then: Add an action' (What the rule will do). Below these is a '+ Add component' button. On the right, the 'Add an action' panel is open, showing a trash icon at the top right. It has a search bar labeled 'Search actions'. Below the search bar are two tabs: 'Compatible actions' (selected) and 'All actions'. Under 'Compatible actions', there are several categories: 'Issue actions', 'Notifications', 'Jira Service Management', 'Software', 'Assets actions', 'Advanced', and 'Security'. Under 'Recommended', there is an action 'Start runbook in Azure' with a 'NEW' tag.

Automation smart value – a placeholder to access, substitute, or manipulate issue data

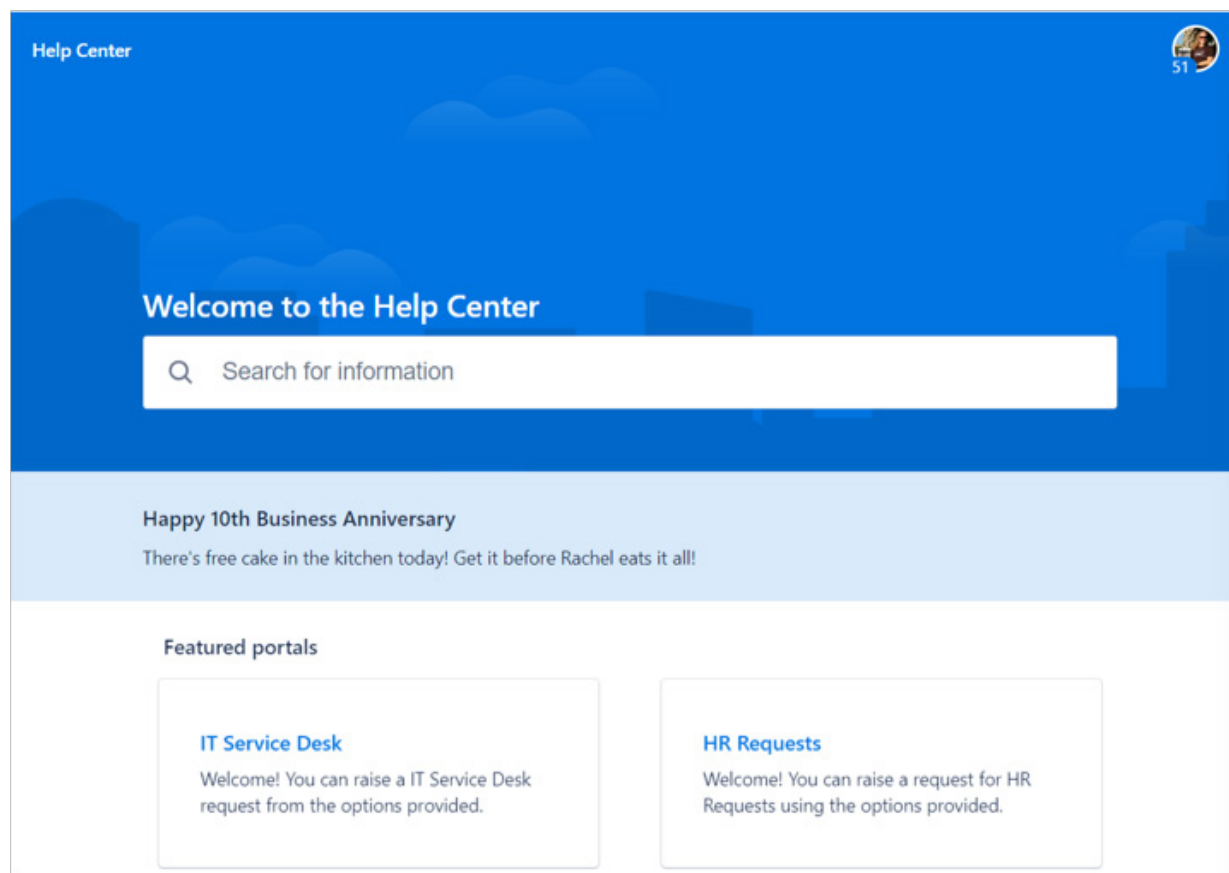
App – third-party software that extends Jira capabilities

Apps are extensions or modules that provide additional Jira functionality. There are hundreds of free and paid apps in the Atlassian Marketplace (marketplace.atlassian.com) to add automation capabilities in Jira and between Jira and other applications.

Jira Service Management (JSM) Terms

Self-service portal – a simplified request interface

Also known as the “customer portal”, “help center”, “help desk”, or “service desk”.

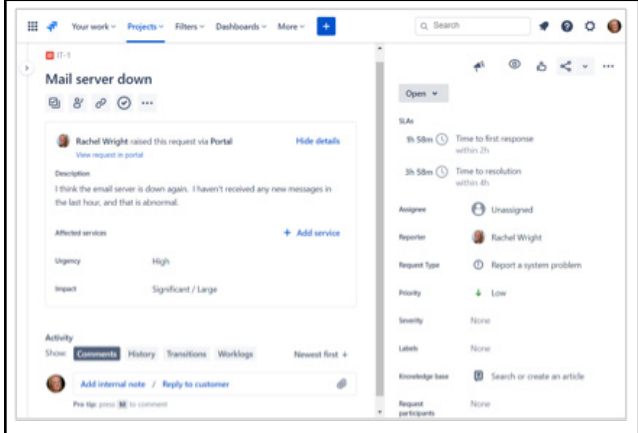


Request – how work items are displayed

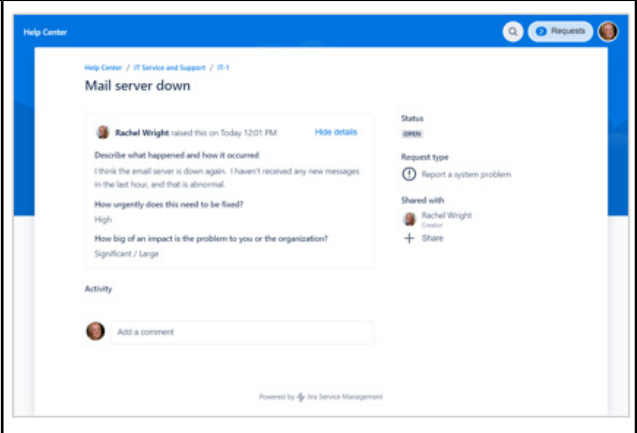
Requests are how Jira work items are represented, on the self-service portal, to customers or end users. In other words, a request is a simplified view of issue data. In the example below, both views represent the exact same trouble report. There's only one unique record in the database for it, however.

ISSUE VS. REQUEST

The issue view in Jira




The request view in JSM



Request type – defines what customers can report, ask, or submit

Request form – contains fields for customers to submit information



[Help Center](#) / [IT Service Desk](#)



Upgrade or change a server

Required fields are marked with an asterisk *


Raise this request on behalf of *



 Rachel Wright (rwright@jirastrategy.com) 








Summary *

Which server and why? *

Normal text ▾

B *I* ...  ▾

       + ▾

Change risk

Change start date

e.g. 23/Apr/25

e.g. 05:33 PM

Change completion date

e.g. 23/Apr/25

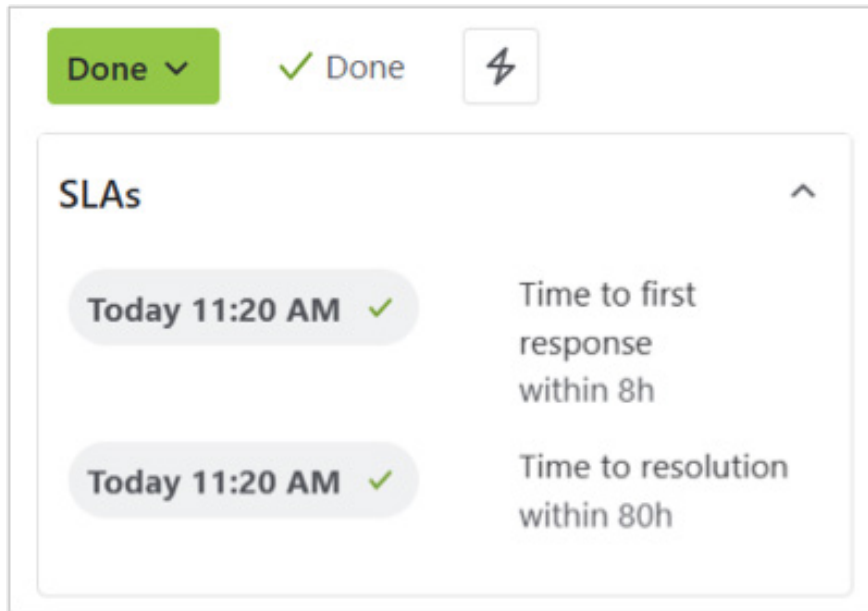
e.g. 05:33 PM

Send

Cancel

Queue – a shared view of work in a JSM project

Service level agreement (SLA) – a goal or a commitment between a service provider and a customer



User Terms

User – works in Jira and JSM

Agent – resolves support requests in JSM

Customer – requests support in the JSM portal

Project role – a common function

Group – users performing a function

Atlassian Account Terms

Organization – a container for your users and products like Jira, Confluence, Bitbucket, and more

Site – a product instance or product set which has its own url in the format `sitename.atlassian.net`

Domain – unique address on the internet like `company.com` or `externalvendor.com`

Atlassian Account – a user's online Atlassian identity (Atlassian ID)