

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

with Rachel Wright



## Jira Project Configuration

Requirements and settings for the course use case

### Use Case Summary

Let's pretend your organization is acquiring another company. When companies merge, there are duplicate functions and systems to connect, integrate, and manage. The deal's been made, and we've been asked to help track the acquisition effort in Jira. We'll use Jira Software to manage changes needed to each company's applications, like their websites. We'll also use Jira Service Management to track users needing access to the other company's systems and to answer technical questions about the acquisition.

### Jira

Create a Jira project with the following settings:

#### Project Details

Project name	Acquisition	Project key	ACQ
Project type	<ul style="list-style-type: none"><li>• Cloud: Software</li><li>• Data Center: Software</li></ul>	Project template	<ul style="list-style-type: none"><li>• Cloud: Company -managed scrum</li><li>• Data Center: Scrum software development</li></ul>
Category	<ul style="list-style-type: none"><li>• Acquisition</li></ul>	Project lead	<ul style="list-style-type: none"><li>• Your name</li></ul>
Description	<ul style="list-style-type: none"><li>• To manage acquisition-related changes for each company's products and websites. Not for acquisition-related user access requests.</li></ul>	Default assignee	<ul style="list-style-type: none"><li>• Project lead</li></ul>

#### Release Versions (Fix Versions)

Name	Start Date	Release Date	Description
1.0.0	First day of sprint (E.g. 1/5/2026)	Last day of sprint, typically 2 weeks (E.g., 1/19/2026)	Initial release

2.0.0	m/dd/yyyy	m/dd/yyyy	Empty
2.1.0	m/dd/yyyy	m/dd/yyyy	Empty
2.1.15	m/dd/yyyy	m/dd/yyyy	Hotfix

## Components

Name	Description	Component Lead	Default Assignee
Product change	Change to a product name, specs, or price	Empty	Unassigned
Website change	Change to a customer facing web page	Your name	Component lead
Other	Empty	Empty	Unassigned

## People (Cloud), People and access (Cloud – JSM), Users and roles (Server and Data Center)

Name	Email	Role
site-admins (group)	Empty	Administrators
Test User	Test-user@yourdomain.com	Administrators

## Issue types

<b>Issue types</b>	Story, Improvement, New Feature, Bug, Task, Epic, Sub-task
<b>Default issue type</b>	Story
<b>Issue type scheme name</b>	Development Issue Type Scheme

## Workflows

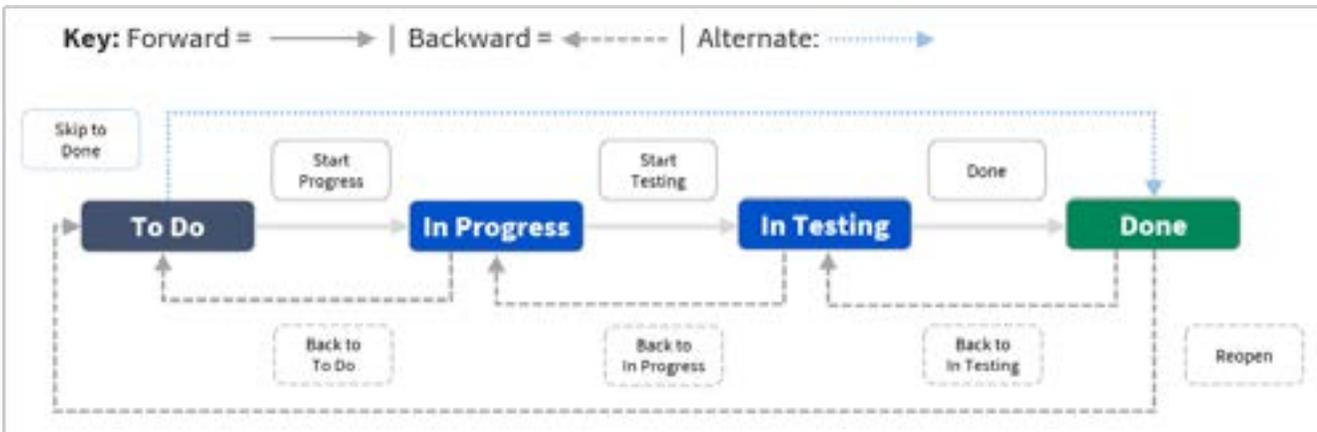
**Workflow name:** Global 4 Step Testing Workflow



Status	Transition	Transition Notes	Behaviors
To Do	<i>In Progress</i> >> In Progress	Global	• Post function: The <b>Resolution</b> of the issue will be <b>cleared</b> .
	<i>In Testing</i> >> In Testing	Global	• Post function: The <b>Resolution</b> of the issue will be <b>cleared</b> .
	<i>Done</i> >> Done	Global	• Post function: The <b>Resolution</b> of the issue will be set to <b>Done</b> .
In Progress	Same as above	Same as above	• Same as above
In Testing	Same as above	Same as above	• Same as above
Done	Same as above	Same as above	• Same as above

Reminder: In Jira, global transition names are shown in italics.

**Workflow name:** Single 4 Step Testing Workflow

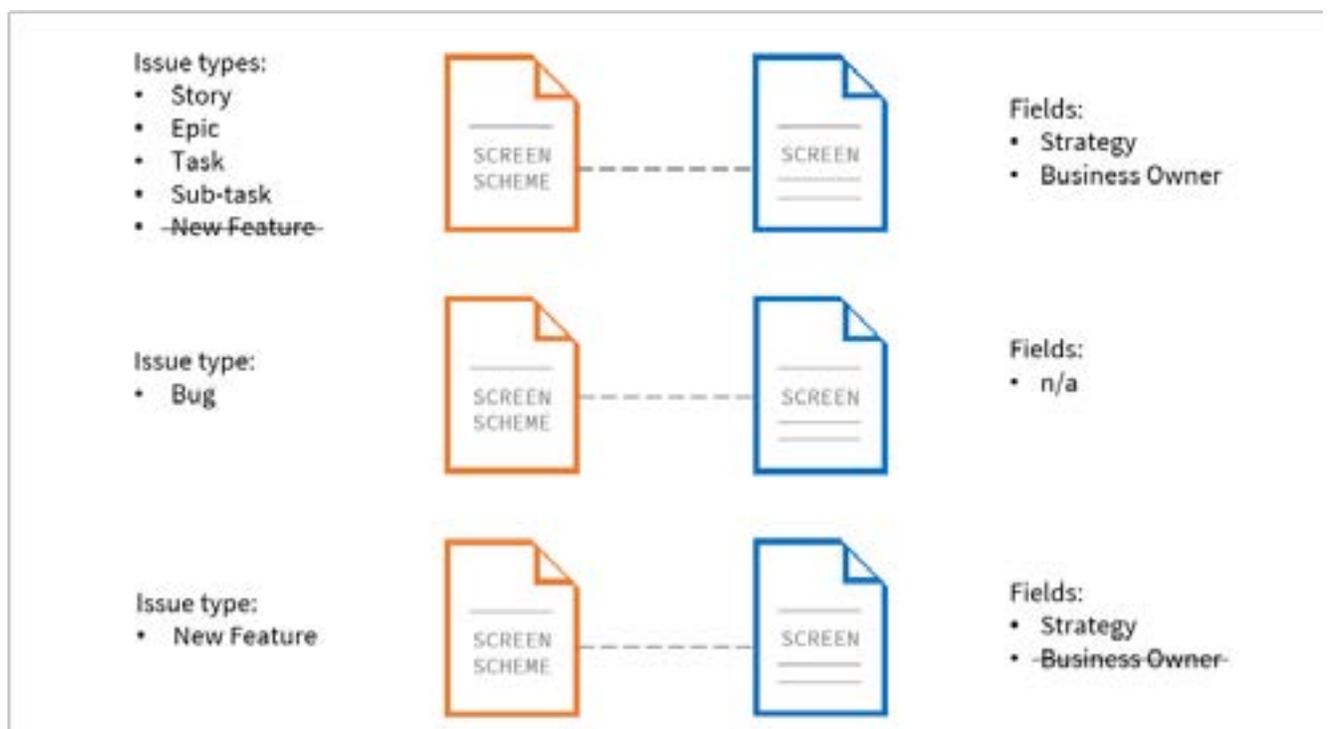


Status	Transition	Transition Notes	Behaviors
To Do	Start Progress >> In Progress	Forward	<ul style="list-style-type: none"> <li>• Post function: Assign the issue to the current user. Please note that the issue will only be assigned to the current user if the current user has the 'Assignable User' permission.</li> <li>• Property: opsbar-sequence = 5</li> </ul>
	Skip to Done >> Done	Alternate	<ul style="list-style-type: none"> <li>• Condition: Only users in any of <b>jira-admins-&lt;sitename&gt;</b>, <b>administrators</b> group can execute this transition.</li> <li>• Property: opsbar-sequence = 15</li> </ul>
In Progress	Start Testing >> In Testing	Forward	<ul style="list-style-type: none"> <li>• Property: opsbar-sequence = 5</li> </ul>
	Back to To Do >> To Do	Backward	<ul style="list-style-type: none"> <li>• Property: opsbar-sequence = 10</li> </ul>
In Testing	Done >> Done	Forward	<ul style="list-style-type: none"> <li>• Screen: Resolve Issue Screen</li> <li>• Property: opsbar-sequence = 5</li> </ul>
	Back to In Progress >> In Progress	Backward	<ul style="list-style-type: none"> <li>• Post function: The <b>Resolution</b> of the issue will be <b>cleared</b>.</li> <li>• Property: opsbar-sequence = 10</li> </ul>
Done	Back to In Testing >> In Testing	Backward	<ul style="list-style-type: none"> <li>• Property: opsbar-sequence = 10</li> </ul>
	Reopen >> To Do	Backward	<ul style="list-style-type: none"> <li>• Property: opsbar-sequence = 15</li> </ul>

## Custom Fields

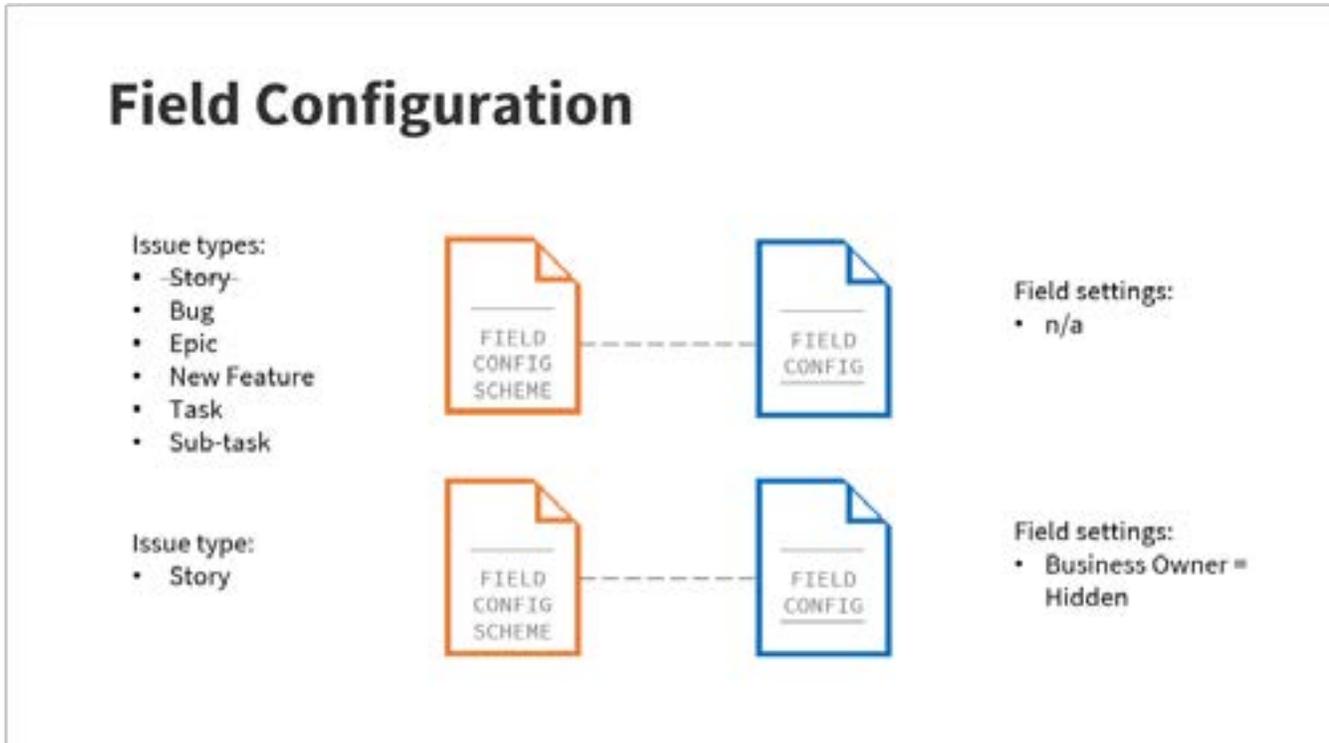
Name	Type	Description	Options
Strategy	Select List (Multiple choices)	Which strategic company priority does this support?	<ul style="list-style-type: none"> <li>Align Priorities</li> <li>Delight Customers</li> <li>Grow Revenue</li> <li>Save Money</li> </ul>
Business Owner	User Picker (Single user)	n/a	<ul style="list-style-type: none"> <li>n/a</li> </ul>

## Screens



Scheme Name	Issue Type	Screen Name	Additional Fields
ACQ: Scrum New Feature Screen Scheme	New Feature	ACQ: Scrum New Feature Issue Screen	<ul style="list-style-type: none"> <li>Strategy</li> </ul>

## Field Configuration



Scheme Name	Issue Type	Field Config Name	Additional Fields
ACQ: Configuration Scheme	Story	ACQ: Story Field Configuration	<ul style="list-style-type: none"> <li>• Business Owner = Hidden</li> </ul>

## Permission Scheme

Scheme Name	Permission	Users / Groups / Project Roles
ACQ software permission scheme	Delete issues	<ul style="list-style-type: none"> <li>• Empty</li> </ul>

## Notification Scheme

Scheme Name	Notification Type	Recipients
Default Notification Scheme	Ready to Test	<ul style="list-style-type: none"> <li>• Any user</li> </ul>

## Sample Jira Issue (ACQ-1)

Project name	Acquisition	Issue type	Story
Summary	<ul style="list-style-type: none"><li>As a customer, I want one point of contact for both companies</li></ul>	Component	<ul style="list-style-type: none"><li>Website change</li></ul>
Description	Change the contact information on the acquired company's website so customers only have one phone number, email address, and mailing address to utilize.		

## Sample Jira Issue (ACQ-2)

Project name	Acquisition	Issue type	Bug
Summary	Typo in mailing address		
Description	There's a typo in the new mailing address for our combined corporation. The street address should read "4565" instead of "456".		
Environment	<ul style="list-style-type: none"><li>Production</li></ul>	Original estimate	<ul style="list-style-type: none"><li>10m</li></ul>
Priority	<ul style="list-style-type: none"><li>High</li></ul>		

## Sample JQL Filter

Filter name	ACQ Bugs	JQL	project = ACQ and type = bug
Viewers	My organization	Editors	Private

# Jira Service Management

Create a JSM project with the following settings:

## Project Details

<b>Project name</b>	Acquisition Help	<b>Project key</b>	ACQHELP
<b>Project type</b>	<ul style="list-style-type: none"><li>• Cloud: Service management</li><li>• Data Center: Service</li></ul>	<b>Project template</b>	<ul style="list-style-type: none"><li>• Cloud: Blank project</li><li>• Data Center: Basic</li></ul>
<b>Category</b>	<ul style="list-style-type: none"><li>• Acquisition</li></ul>	<b>Project lead</b>	<ul style="list-style-type: none"><li>• Your name</li></ul>
<b>Description</b>	<ul style="list-style-type: none"><li>• To track user access requests and technical questions about the acquisition. Not for acquisition-related changes to each company's products.</li></ul>	<b>Default assignee</b>	<ul style="list-style-type: none"><li>• Project lead</li></ul>

## Sample JSM Request (ACQHELP-1)

<b>Project name</b>	Acquisition Help	<b>Issue type</b>	General request
<b>Summary</b>	<ul style="list-style-type: none"><li>• Can't login to email</li></ul>	<b>Request type</b>	<ul style="list-style-type: none"><li>• Get IT help</li></ul>
<b>Description</b>	After yesterday's mail server consolidation, I'm not able to login to my email.		
<b>Priority</b>	<ul style="list-style-type: none"><li>• Highest</li></ul>	<b>Status</b>	<ul style="list-style-type: none"><li>• Anything except "Done"</li></ul>

## Sample JSM Request (ACQHELP-2)

<b>Project name</b>	Acquisition Help	<b>Issue type</b>	General request
<b>Summary</b>	<ul style="list-style-type: none"><li>• Can't access Sales CRM</li></ul>	<b>Request type</b>	<ul style="list-style-type: none"><li>• Emailed request</li></ul>
<b>Description</b>	I can access the customer relationship management software while I'm in the office, but the login page doesn't load when I'm out in the field. How can I solve this when working remote?		
<b>Priority</b>	<ul style="list-style-type: none"><li>• Highest</li></ul>	<b>Status</b>	<ul style="list-style-type: none"><li>• Anything except "Done"</li></ul>

## Sample Customer Email Notification Template Code

Note: The two code lines below each contain two leading spaces for visual alignment in JSM.

```
<span class="jsd-link-separator">&middot;</span>  
<a class="jsd-issue-link" href="mailto:help@company.com">Contact us</a>
```

## Sample Request Resolved Notification Code

```
Dear ${recipient.name},  
  
${event.user.name} resolved your request as ${issue.resolution}. If you need any  
further assistance, please simply add a new comment to reopen this issue.  
  
Have a lovely day!
```

## Sample Confluence Article

Space name	Acquisition Help	Content type	Page
Title	VPN Connection Instructions	Label	Access
Content	A VPN is an encrypted channel for remote employees to access our internal network.  To connect to the VPN: <ul style="list-style-type: none"><li>• Download and install the client software from our intranet</li><li>• Configure the client with the listed settings</li><li>• Connect to the server using your network credentials</li></ul>		

## Sample Automation Rule 1

Use case: In the Acquisition Help Jira project, when a request is created, send an email notification to all customers involved.

Rule name	Request created		
Trigger	<ul style="list-style-type: none"><li>• Work item created (Cloud)</li><li>• Issue created (Server and Data Center)</li></ul>	Condition	<ul style="list-style-type: none"><li>• None</li></ul>

<b>Branch</b>	• None	<b>Action</b>	• Send email
<b>To</b>	• All customers involved	<b>Subject</b>	• Request created
<b>Content</b>	Thank you for submitting your request to the Acquisition Help Desk. We're working on it and will be back in touch with you shortly.		
<b>Scope</b>	• Single project	<b>Project</b>	• Acquisition Help (ACQHELP)

### Automation Rule Content with HTML and Smart Values

<b>Content</b>	<p>Hi {{issue.reporter.displayName}},  Thank you for submitting &lt;b&gt;{{issue.key}}&lt;/b&gt; to the Acquisition Help Desk. We're working on it and will be back in touch with you shortly.</p> <p>Summary: {{issue.summary}}  &lt;a href="{{issue.url}}" target="_blank"&gt;View request&lt;/a&gt;</p>
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### Sample Automation Rule 2

Use case: In the Acquisition Help Jira project, if a request is resolved, and a customer adds a comment, put the request back in “In Progress” status.

Rule name	Transition after customer comment		
<b>Trigger</b>	• Work item commented	<b>Condition</b>	• User condition • JQL condition
<b>Branch</b>	• None	<b>Action</b>	• Transition work item
<b>Code snippet for “Additional fields” field</b>	<pre>{   "fields": {     "resolution": null   } }</pre>		
<b>Scope</b>	• Single project	<b>Project</b>	• Acquisition Help (ACQHELP)