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

with Rachel Wright

LEARNING

Making Initial Decisions

Use these action items to help make initial Jira set up decisions and consider actions you should take to address long term ongoing challenges.

Planning your Implementation

1. Create an Internal Jira Advisory Board

Whether you've just started with Jira or you've been using it for years, such a powerful and useful application should not be directed by a single person. You'll want a governance or steering committee, who can establish standards and support both the application and its users. Users who set the application's strategy may be different from those who perform maintenance and administrative functions.

2. Determine Usage

Decide how Jira will mainly be used. Will it be for software development, tracking business tasks or team "to do" items, support and service, planning and implementing strategic company priorities, or all of the above?

> **TIP:** Jira is for everyone! Marketing, Legal, Customer Service, Product, Finance, Facilities, and other teams can all use it to track their tasks too!

3. Determine Ownership

Decide who is responsible for the application. Who will make initial and ongoing configuration changes? Who will maintain the application? Who will vet and install third-party apps? Who will perform upgrades? (Server and Data Center only) Who will ensure application, server, database, and network stability? (Server and Data Center only)

Addressing Technical Requirements (Data Center only)

4. Choose a Deployment Type

Which hosting environment is appropriate for your organization and industry? Will you utilize a Cloud (hosted by Atlassian) or a Data Center (a clustered) implementation? If Cloud, also choose between the free, standard, premium, and enterprise plans. Do you require the high availability, performance at scale, and disaster recovery features of Jira Data Center? Note: Atlassian stopped selling new licenses of their Server products and support for them ended on Feb 2, 2024.

5. Choose an Application Type

Decide which Jira product, or combination products to use. All application types can be standalone or used together. Will you utilize Jira Software (JSW), Jira Work Management (JWM), Jira Core, Jira Service Management (JSM), Jira Product Discovery (JPD), or a combination?

Application Types

	JSW	**JWM** (Cloud) and **Jira Core** (Server and Data Center)	**JSM**	**JPD (Cloud)**
For:	Development teams	Business teams	Support teams	Product teams
Best use:	Scrum, Kanban, and software development	Project, process, and task management	Help desks	Developing ideas and initiatives
Features:	• Sprints • Story points • Releases • And more	• Projects • Issues • Workflows • And more	• SLAs • Queues • CSAT Survey • And more	• Idea tracking • Impact assessment • Effort assessment • And more

6. Determine User Count or Choose a License Tier

Determine current and future licensing needs. How many users need to login to Jira? How many agents will fulfill requests in Jira Service Management? Are license costs factored into the initial and ongoing budget?

> **TIP:** Total user count also impacts app pricing.

> **TIP:** In Jira Service Management, you only need to license the service desk team members who provide support. Users who request support or leverage knowledge base content do not need licenses.

7. Choose a Version (Data Center only)

Use the Atlassian release notes to determine which version to use. Will you install the latest version or the latest long term support release?

8. Choose an Operating System, Application Server and Database Type

Determine all the supported platforms and technical implementation requirements. Will you install the Windows, Linux, or OS X version? Will you leverage a Cloud hosting environment like Amazon AWS, Google Cloud Platform, or Microsoft Azure? Will you use PostgreSQL, MySQL, Oracle, or another database?

9. Examine Hardware Requirements

Review the physical requirements. Is the needed hardware available or does it need to be acquired? Is enough bandwidth and capacity available? Is the hardware actively maintained and supported? Is the hardware physically secured?

10. Examine Database Requirements

Review the record storage needs. Is the database size limit adequate now and easy to expand in the future? Are adequate connections available? Is the database actively maintained and supported? Is database access secured?

11. Examine Email Requirements

Review the mail server specs. Which mail server will send Jira notifications? Can it adequately handle the initial and future demand? Is the mail server actively maintained and supported? Is access secured?

12. Determine Installation Location

Select a home for the application software. Where will the application be installed? Will it be located inside a firewall? Will external users, vendors, or customers need to access the application?

13. Determine Attachment Location

Decide whether to use the default attachment location or a custom location. Where will attachments be stored? Is the storage space adequate now and easy to expand in the future?

14. Make Other Technical Decisions

Will the application be secured with SSL? (Recommended) How will SSL expiration and renewal be managed? What load balancing and reverse proxy settings are needed?

Managing New and Existing Data

15. Create a Backup Strategy

Determine a plan for backing up important data. Make Jira part of the corporate disaster recovery plan. How and how often will application files, database records, configurations, workflows, automation rules, scripts, and attachments be backed up? Where are backups stored? How long are backups retained? Is access to the backup resources secured? How are backups validated?

16. Determine Data Import Needs

Decide how to handle pre-Jira data. Does existing data from another application need to be imported? What is the structure of the data and how will it be mapped to Jira's structure?

17. Determine Data Insertion Methods

Determine how new information is added to Jira. (Examples: From the user interface, via import, email, script, the REST API, an issue collector or widget (web form), from the Jira Service Management customer portal, etc.)

Managing Users and Access

18. Create a User Management Strategy

User management is more than just "adding new users" as they join the company. Your user list needs regular attention to remain accurate. You must establish procedures to support new users as well as departing users. How will you handle and receive access requests and removals? How will you handle permissions related requests? How will you manage application access and group membership?

19. Determine Access and Credentials

Decide how users will access the application. What credentials are needed for login? How does a new user securely receive credentials? Will access be local to the application or managed in Active Directory, Google Apps, Atlassian Guard, Crowd (an Atlassian application), Okta, or another service? Is two-factor authentication or single-sign on needed?

20. Select an Application Administration Team

Create a strong, 2–5-person, admin team. Who will be responsible for new project configuration, customization, user access and permissions, app vetting and testing, and daily application management?

21. Appoint Ambassadors

In addition to your advisory board, you'll want to enlist the help of power users to disseminate information, answer common questions, and serve as a liaison to end users. A small team of Jira ambassadors is a vital asset when you need to execute changes or communicate the change request process.

22. Determine an End User Training Strategy

Determine your training needs and timeline. How will you train end users and encourage adoption?

Establishing Standards and Policies

23. Establish Standards

Jira comes with project templates and default schemes to get you started. For example, a default workflow, permissions scheme, notification scheme, etc. Before you start building new custom schemes, the advisory board should decide how many of each to offer and for what purpose. Setting standards will help keep your application uncluttered and easy to maintain.

24. Determine a Project Strategy

Creating a repeatable and standard procedure will save time when collecting and fulfilling project creation requests. How will projects be created and organized? Example: Per initiative, per team, or per process? How will projects be named, categorized, and configured?

25. Determine a Project Security Strategy

Decide how projects will be secured. Will projects and issues be visible to all users? Which projects will external users have access to? (E.g., Contractors, consultants, and temporary employees.) Which projects contain sensitive information? Which projects require issue level security?

26. Create a Sensitive Information Policy

Determine what sensitive information is permitted in Jira. Your policy will depend on whether your application is subject to compliance standards, how access to sensitive data is controlled, other internal company information security policies, your industry, the laws in your country, whether you accept credit card payments, and other related factors.

27. Establish Special Policies and Procedures

Write and communicate any other needed policies. What additional company-specific procedures should be established? What auditing, compliance, or security requirements must be considered and incorporated?

Planning Maintenance and Support

28. Determine Application Support Procedures

Determine how to manage application support. Where will support, user addition and removal, changes, and new app requests be collected and tracked?

> **TIP:** The easiest way to manage Jira support is from within Jira itself!

29. Set Up a Maintenance Plan

A maintenance strategy and proactive action is essential to a healthy application. What regular maintenance actions will be performed? How often? How will you communicate maintenance activities to end users?

30. Create an Upgrade Plan (Data Center only)

An upgrade is a major activity that requires careful planning. What is your upgrade plan? How will you prepare? How will you ensure success? How often will you upgrade?

Other Initial Decisions

31. Set Up a Test Environment (Data Center) or Sandbox Environment (Cloud Premium or Enterprise)

Always test major changes, large imports, upgrades, app installations, proof of concepts, and clean-up activities in a test environment first. Make sure the data and resources powering the test environment match the production environment as much as possible. Make sure the software version and configuration are an exact copy of production. For Data Center, get a free development license from Atlassian.

> **TIP:** Disable email in the test environment to avoid notifying end users with duplicate or test data.

32. Establish an App Vetting Procedure

There are a plethora of plugins and add-on features available in the Atlassian Marketplace. But haphazard installs and free trials can leave behind remnants that negatively impact the application after the trial ends. You should develop specific procedures for handling apps and customization requests. The procedure should include pre-installation vetting, installation and trial testing, and uninstall clean up procedures to ensure functionality and stability.

33. Determine Integrations and Connections

Determine what connection points are initially needed and under what conditions new connections will be added. What other Atlassian or non-Atlassian applications will Jira connect to? Will other internal applications use the REST API or connect to the database?

34. Set Up Monitoring (Data Center only)

Set up additional software to routinely check the health of the application and database. Monitors and alerts help the admin team proactively maintain the application. Don't let end users be the first or only source of trouble reports.

35. Engage with the Jira Community

There's an amazing community of experts, administrators, consultants, end users, and Atlassians publishing new information and providing assistance. Connect with others through your local Atlassian user group (ace.atlassian.com), participate in the online community (community.atlassian.com), and attend the annual user conference (events.atlassian.com).