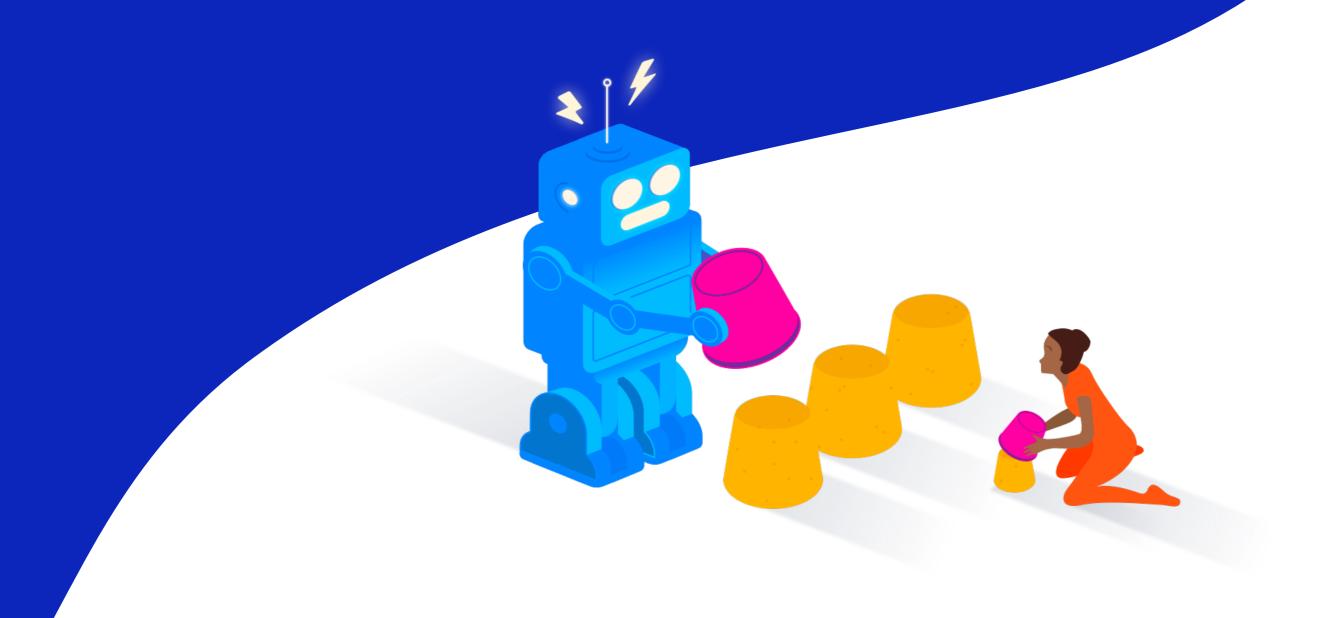


14 ADMIN HACKS FOR JIRA, CONFLUENCE AND BITBUCKET

Our Ultimate Atlassian Tips and Tricks Ebook

In this ebook, our Atlassian experts and consultants share some of the tips & tricks they use to save time and energy when working in Server and Data Center instances of Jira, Bitbucket, or Confluence.



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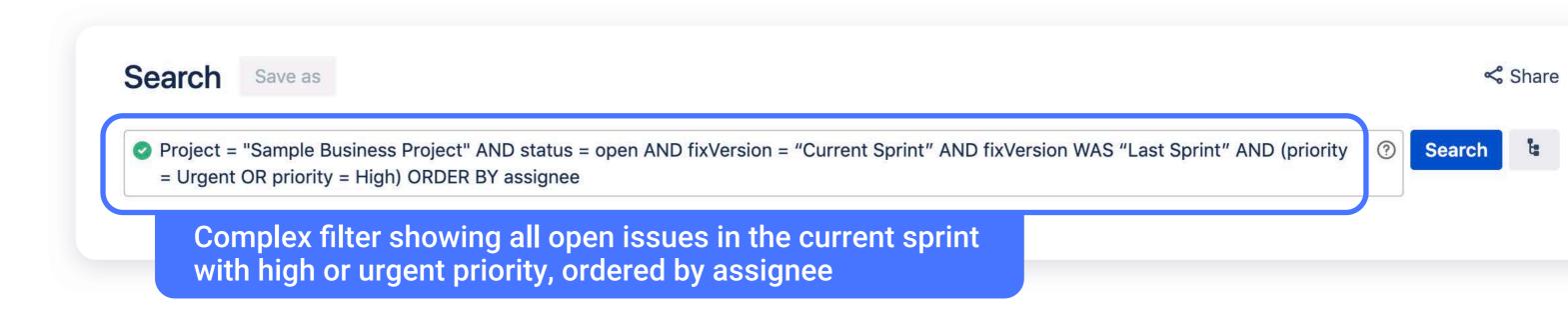
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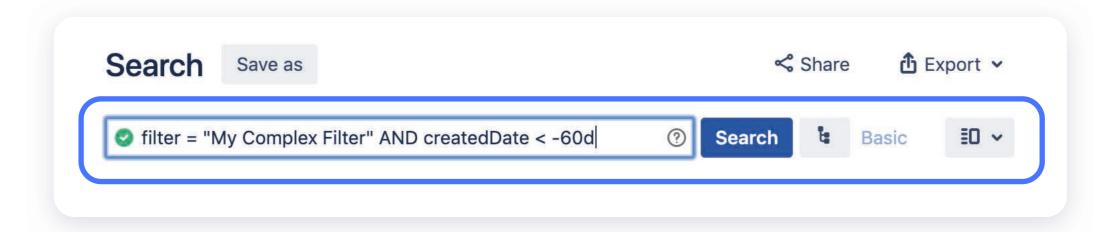
1. Use filters to drill down for info within other filters

As a Jira admin or user, you often have to create very complex filters in your work. Make your life easier by saving your complex filters and applying filters on them to focus only on certain results.

First, create your complex filter and save it in Jira.



You can reuse your saved filters inside other filters. For example, the filter below will find all tickets in the saved 'My Complex Filter' that were created earlier than 60 days ago.



GOING PRO

Go beyond Jira's native JQL search capabilities

ScriptRunner for Jira offers over 40 useful JQL functions that go well beyond Jira's out-of-the box capabilities and allow you to create your own bespoke functions. Even better, with ScriptRunner for Jira you can integrate your filters into complex automations of your Jira instance.

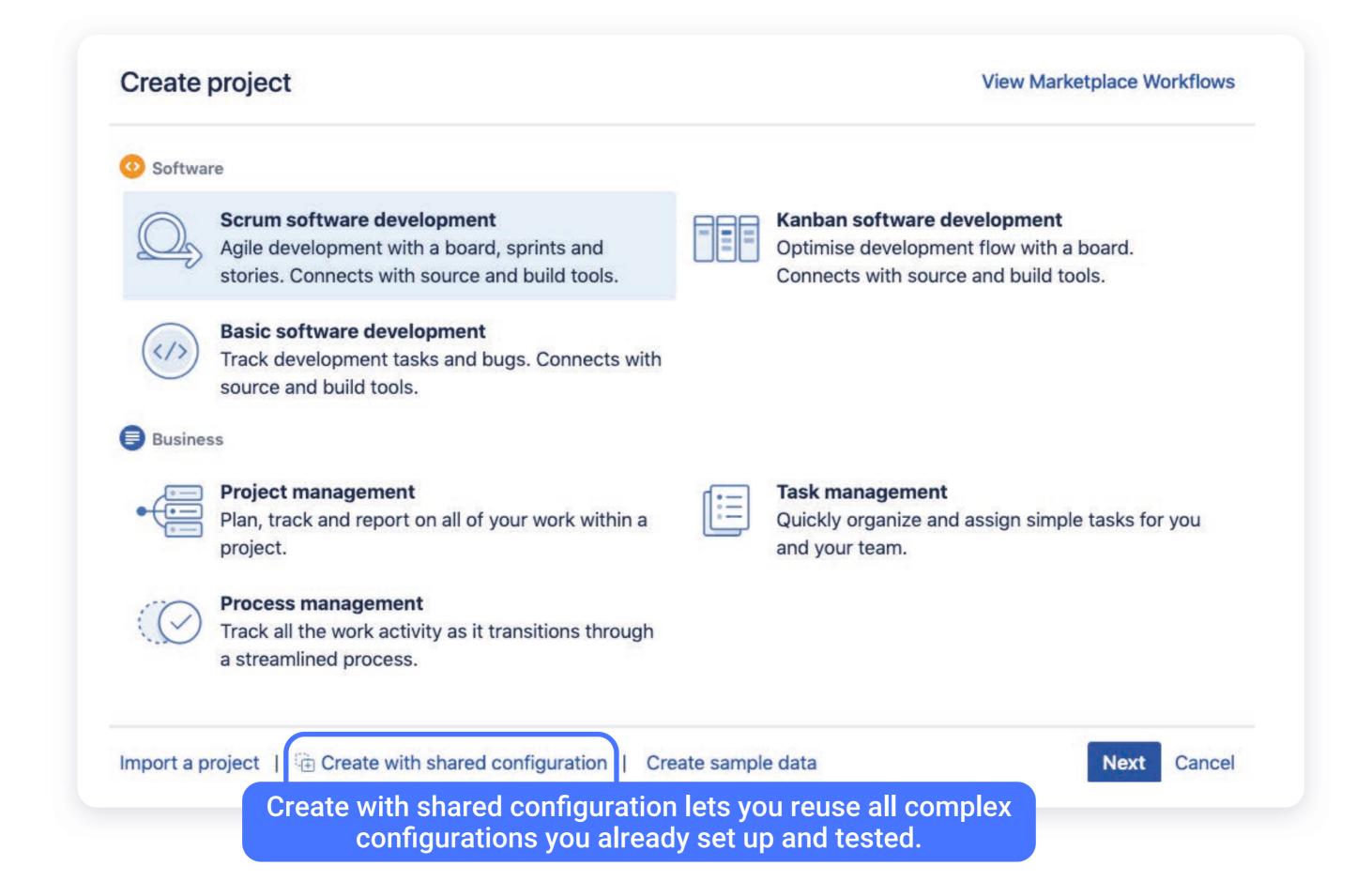
Access the 10 most commonly use ScriptRunner JQL functions



2. Avoid manual work with Shared Configuration

When an admin creates a new project in Jira, it's too easy to select one of the predefined configurations that are front and centre in the 'Create project' box. But the most powerful option is actually at the bottom of the box, and not very visible: 'Create with shared configuration'.

Using this allows you to reduce the ongoing administrative actions by reusing all the complex configurations you have already established and tested.



With 'Create with shared configuration', your new project is created with the same schemes as an already existing project of your choice.

Initially, you will have to put in the effort to set up your configuration and your schemes the way you want them to work. Once you have done this, you won't have to waste time doing it all over again.



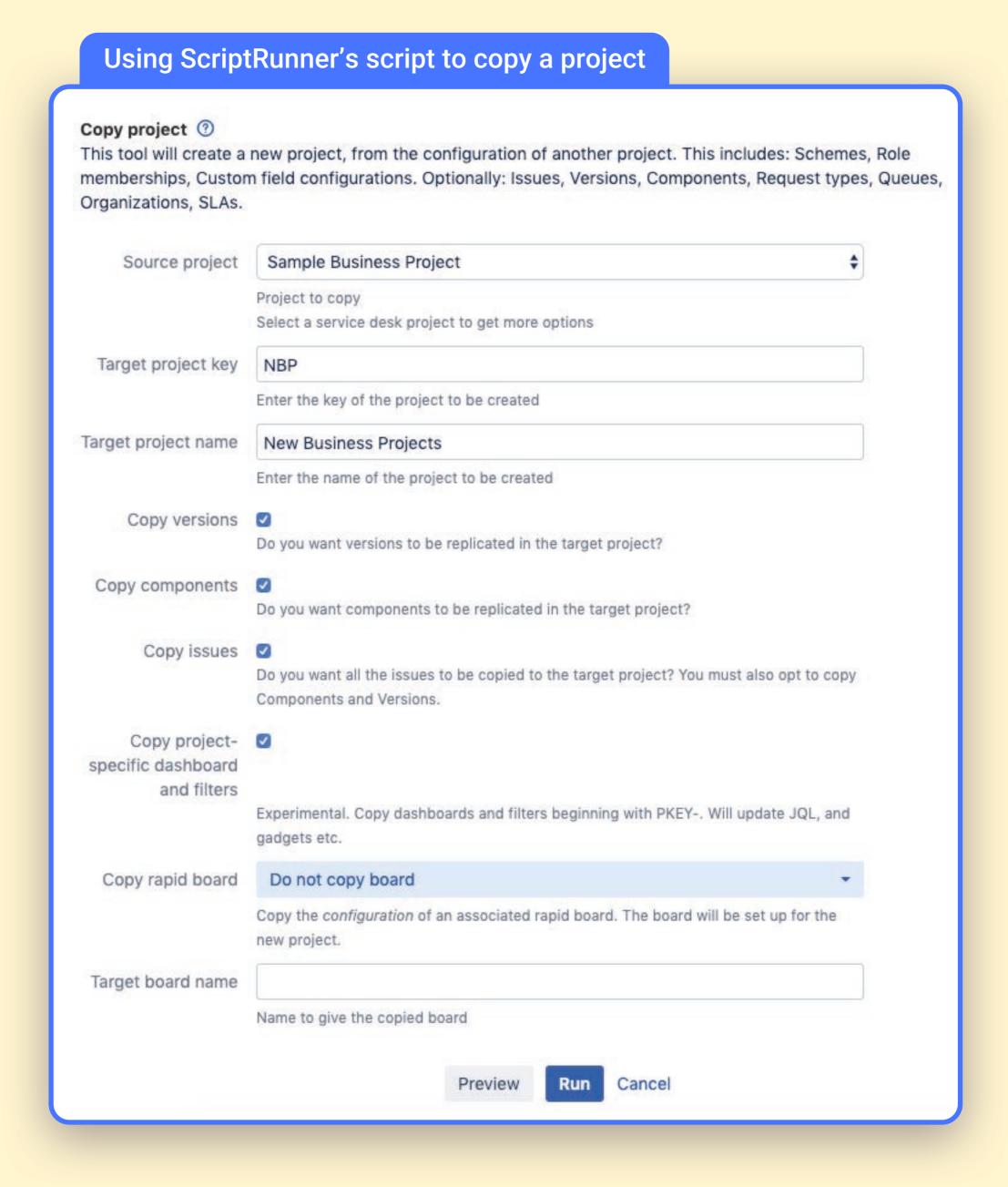
Whenever you need to make a change to the configuration, modify the original project and the change will be applied to all other projects created with its configuration.

GOING PRO

Clone an existing project with all its existing components

But what if you need to create a new project that not only copies schemes from an existing project, but also role memberships, custom field configurations, agile boards related to the project and filters and dashboards?

Jira out-of-the box does not offer this option, but ScriptRunner for Jira offers a simple solution - the <u>Copy project</u> built-in script.





Our advice: Use a test environment to test your configuration changes.

Many busy Jira admins take shortcuts and make changes to their configuration directly on the Jira production environment. Sometimes, something goes wrong and impacts end users in catastrophic ways. Always test in a different environment. Deploying changes from testing to production might be a long manual process, but it's worth it in the long run. And you can always use a solution like Project Configurator for Jira to automate your migration process.

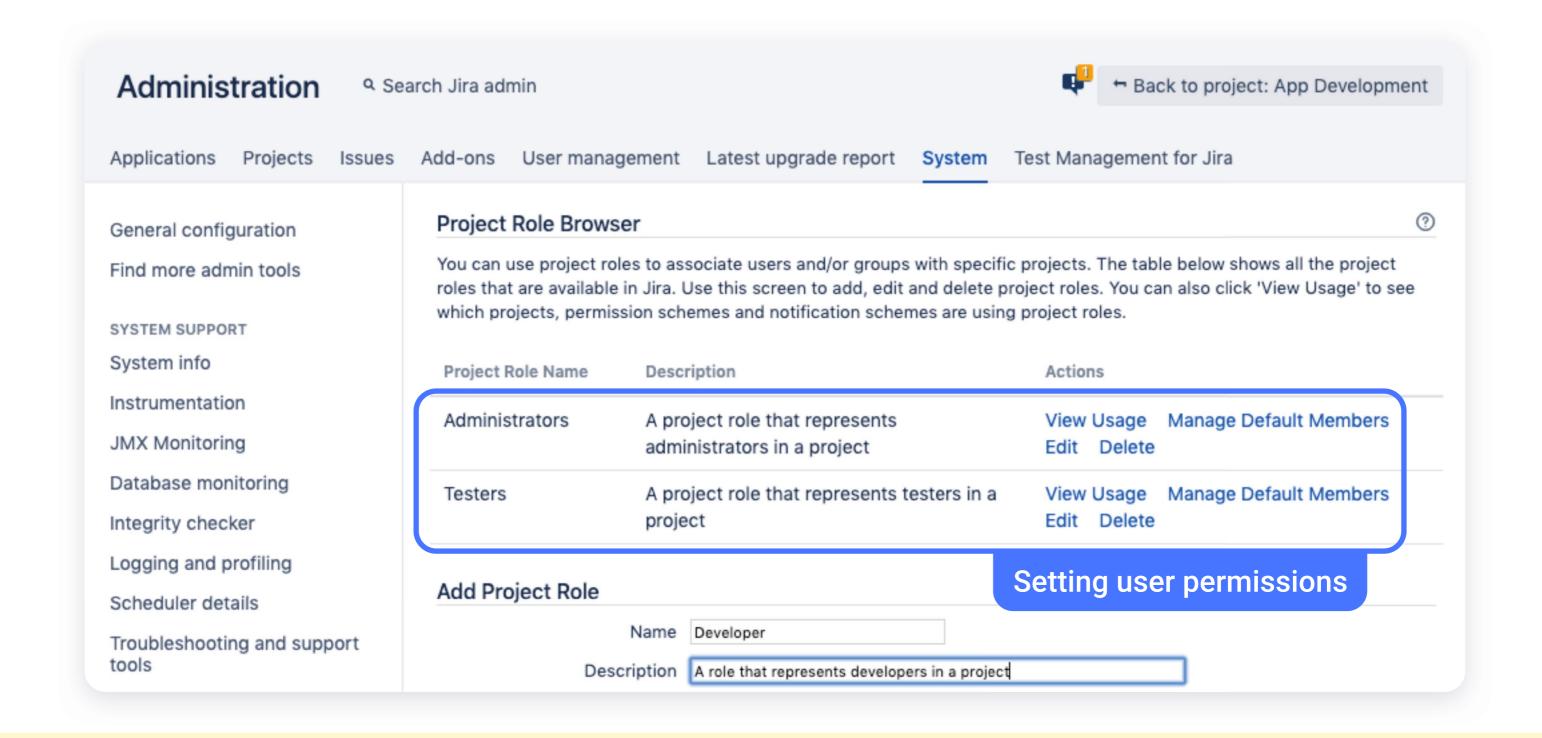
3. Define Permission Schemes on project roles to save time

When setting up a Jira instance, a lot of admins set up their permission schemes based on groups.

However, this approach can limit the scalability of your instance and have you spending a lot of time adding and removing people from groups, which will cause headaches in the future.

As most teams work on a project basis, it is actually better to set up Project Roles. This gives you the flexibility to give different people different access based on each individual project rather than needing to have a higher level view with groups.

Start by setting up a Project Administrator role and then define the other roles based on the tasks they have inside the project - developer, analysts, tester, etc. The Project Administrator will have the power to assign or remove users from specific roles themselves, so they won't need to come to you whenever a new person joins their project or is assigned to a new role.

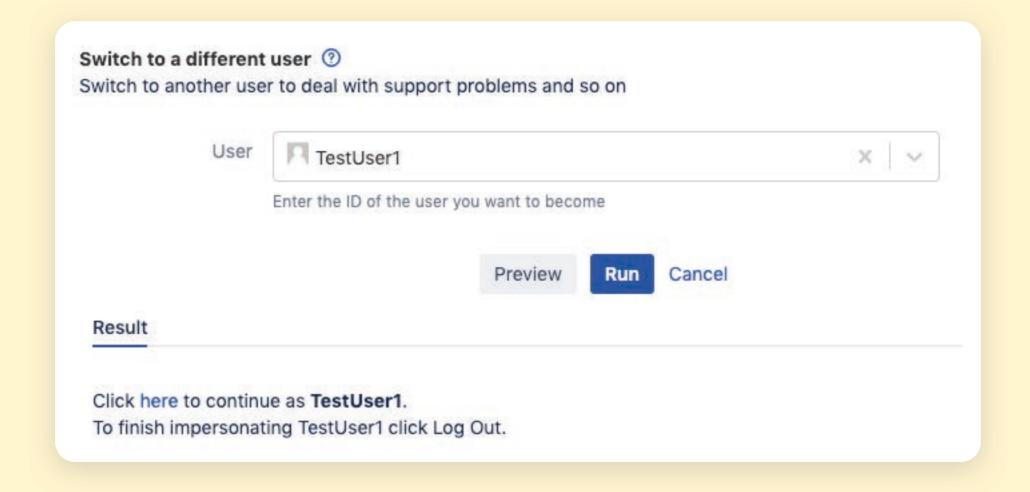


GOING PRO

Diagnose users' permission issues at a glance

Diagnosing user permission issues via screengrabs and messages exchanged over Slack or email can be incredibly frustrating.

Luckily, ScriptRunner for Jira's <u>Switch to a different user</u> built-in script allows the admin to temporarily assume the identity of another user and reproduce specific problems.



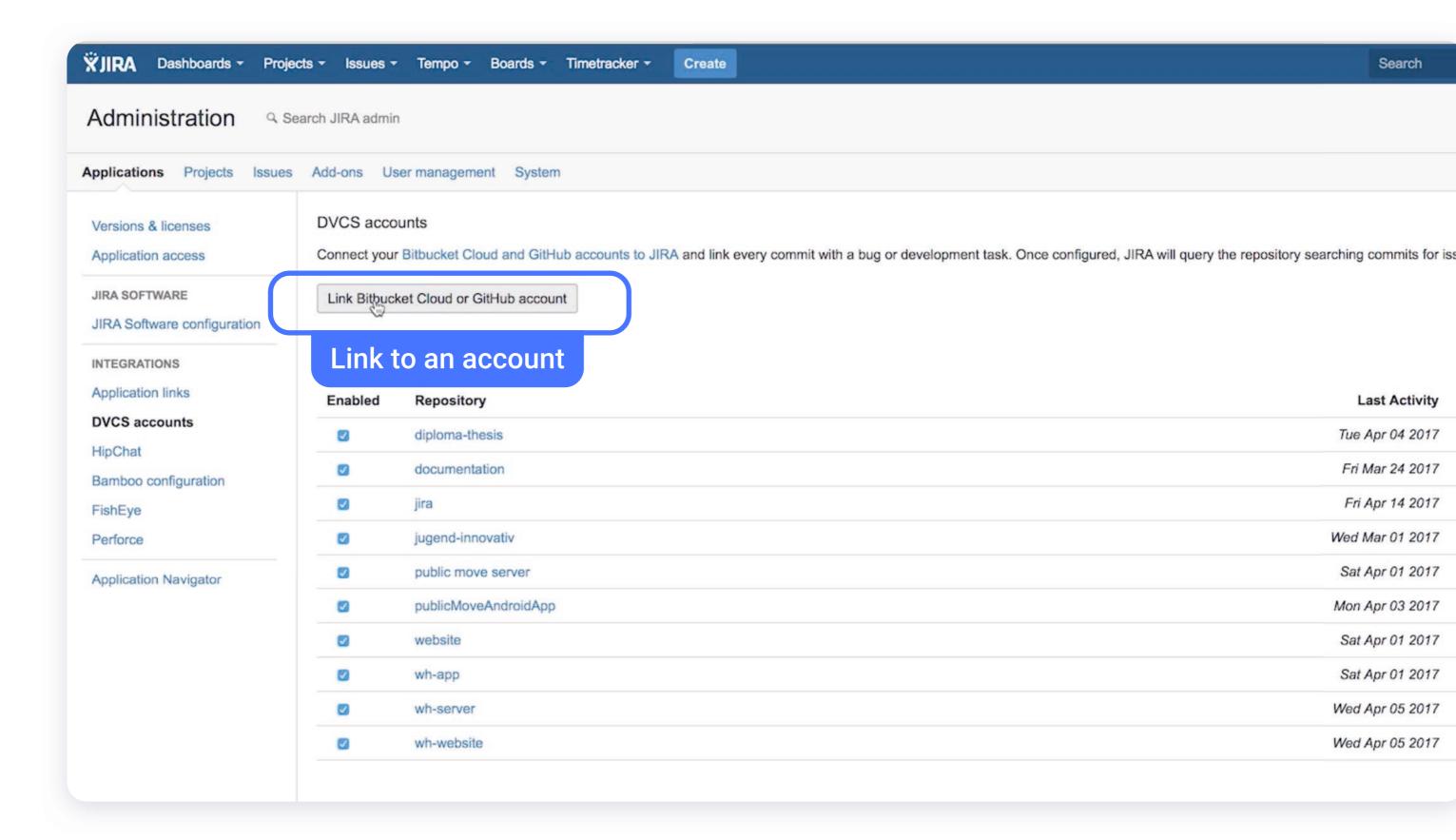
Our advice: Regularly review all permission schemes to ensure they still reflect the business needs. As time goes by, schemes will evolve and change. Keep an eye on the schemes to make sure they still meet the needs of the business and you are making full use of any new functionality that has been released.

4. Make your development team's life simpler with Smart Commits

If you use Jira Server or Data Center and your team manages repositories in Bitbucket or GitHub, you should enable Smart Commits.

It's common that a developer starts working on the code, commits and pushes it to a repository, but doesn't come back to the actual Jira issue to update the status and add a comment and a worklog.

Smart Commits allows the dev to include the Jira issue Key in the commit message and along with it update the issue as well. It's a double win: developers can just focus on the code and not worry about Jira, while your development process stays tidy.



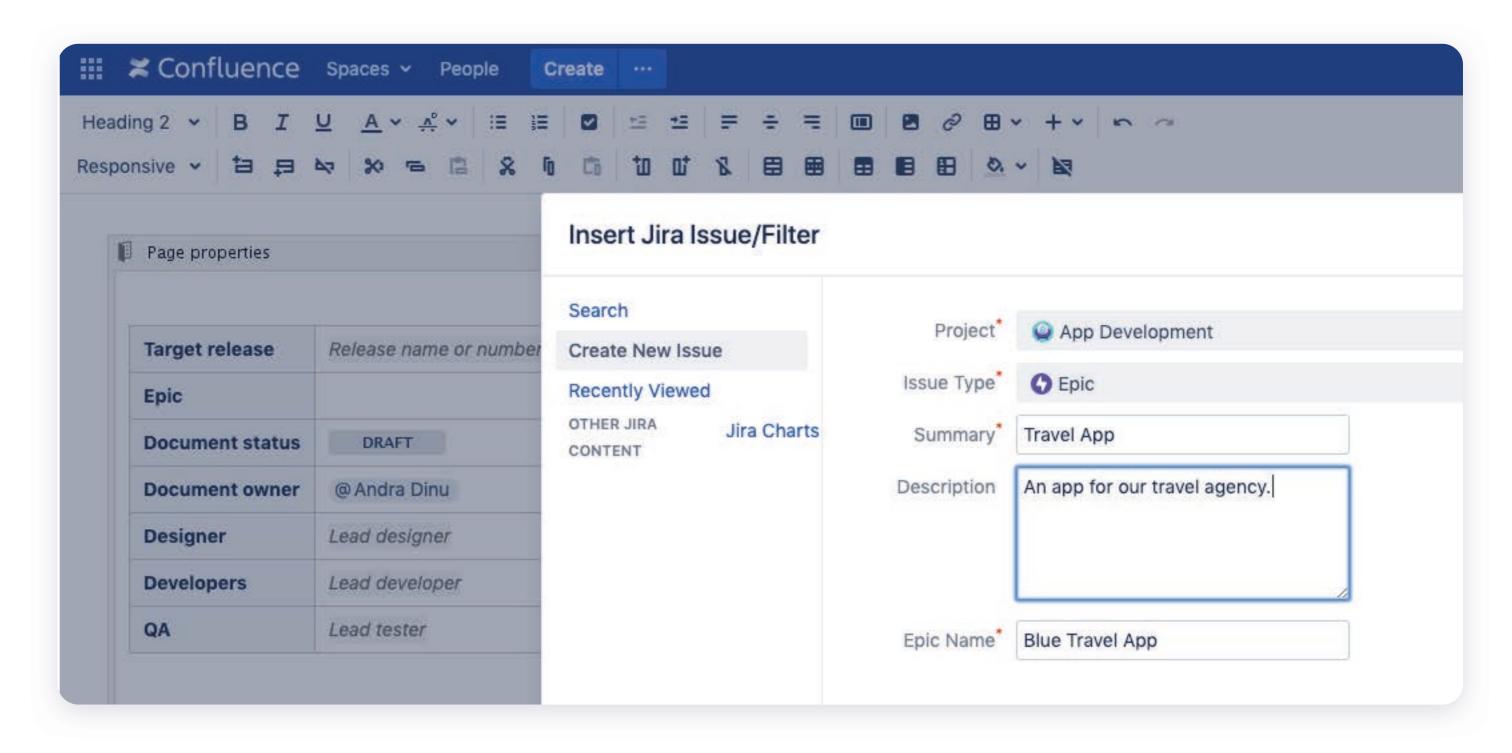
You can go one step further and combine Smart Commits with <u>Workflow</u> <u>Triggers</u> - which mirrors the development workflow in a Jira workflow. For example, when a new branch is created, the status of the corresponding Jira issue is changed to 'In Progress'. When a developer does a pull request, the status is changed to 'In review'. Finally, when the branch is merged, the status becomes 'Resolved' or 'Done'.



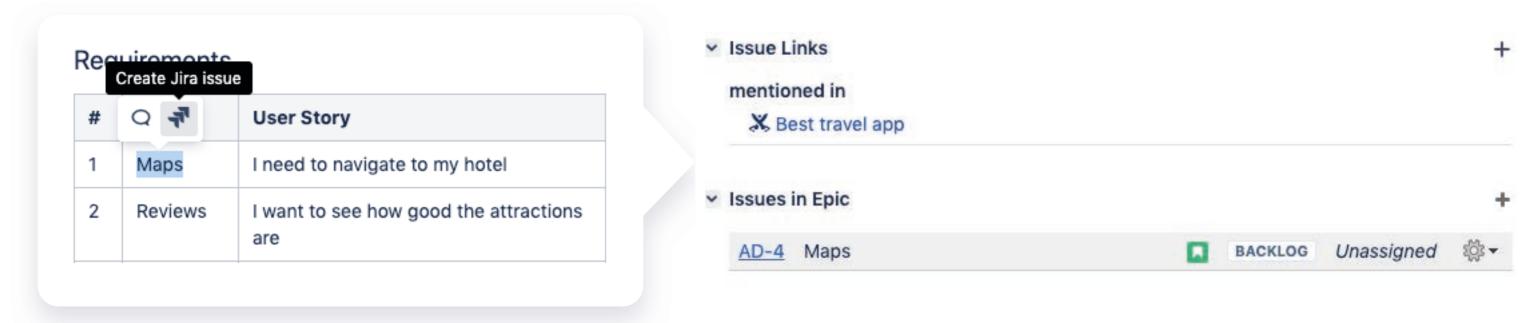
5. Foster collaborative product development with Jira and Confluence

Great products are born out of successful collaboration. When you start defining your product requirements, you have a free flowing conversation, where team members can delete and add until the team feels you've actually determined the entire scope of what you want to deliver - at which point you'll break the work into tasks and start tracking progress.

Once you've linked <u>Jira with Confluence</u>, start with Confluence's <u>Product</u> <u>Requirements</u> Blueprint as a home base for defining your product. Choose the placeholder text 'Link to Jira epic or feature' and create your epic in Jira directly from Confluence.



Once you've linked Jira with Confluence, start with Confluence's Product Requirements Blueprint as a home base for defining your product. Choose the placeholder text 'Link to Jira epic or feature' and create your epic in Jira directly from Confluence.





Our advice: You don't need to stick to Confluence's Product Requirements Blueprint, you can always create your own or customise the existing blueprint to meet your company's unique process.

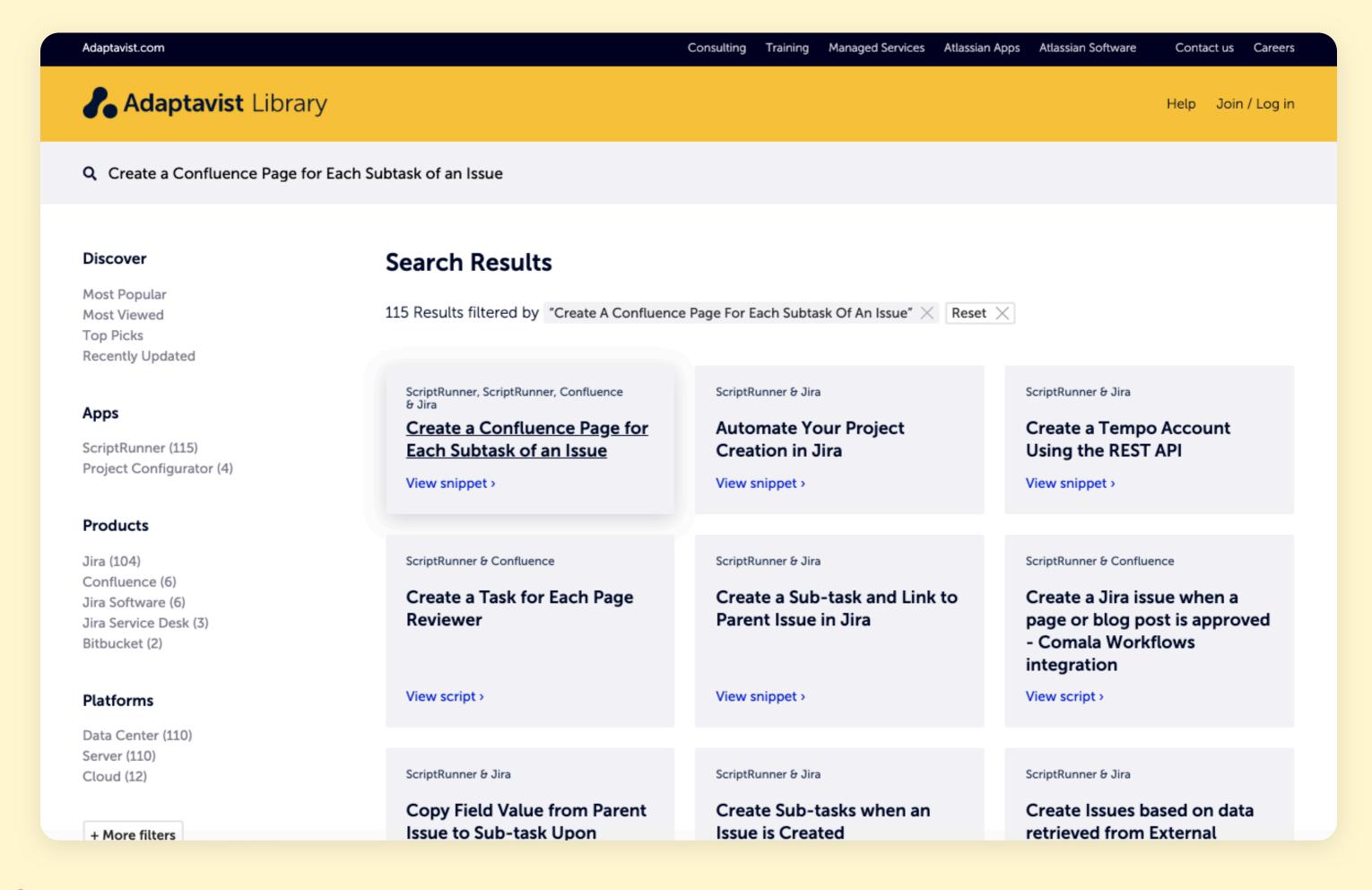
GOING PRO

Automatically create Confluence pages for issues and sub-tasks in Jira

Depending on the needs of your team, you might also need the reverse:
each issue or sub-task in Jira would need to have a corresponding

Confluence page so more in-depth conversations about the feature can
be carried out.

While this is not an out-of-the box Jira capability, ScriptRunner for Jira gives you the power to create complex automations using its Script
Console feature. Using a Groovy script, you could automate the creation of Confluence pages for each project in Jira. Or set up an event listener
which automatically creates a Confluence page for each subtask of an issue. When it comes to bespoke customisation and automation, the sky's the limit!





6. Keep track of assigned, reported, and watched issues on a personal Kanban board

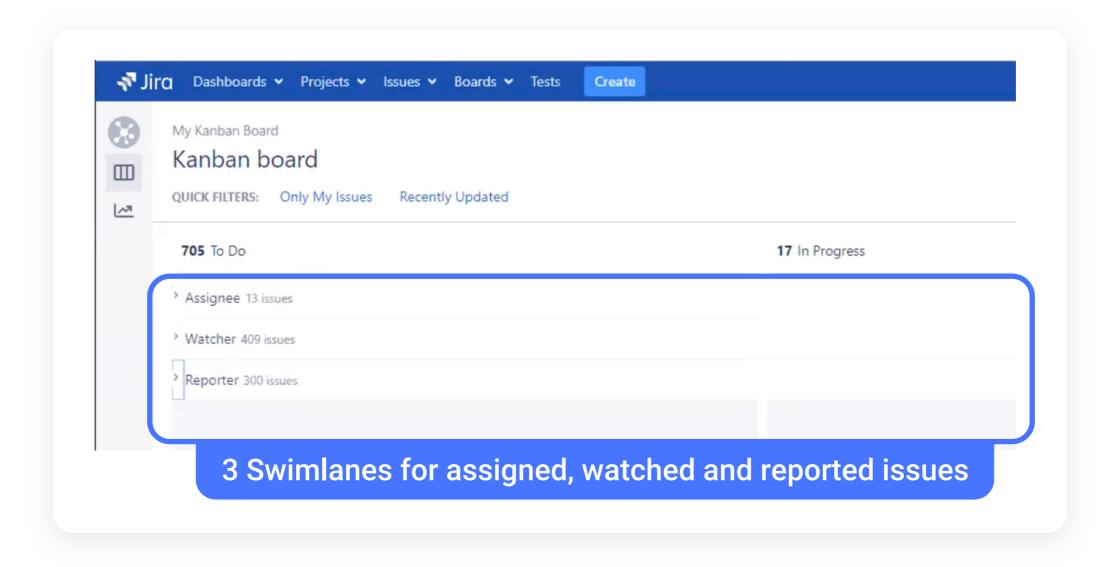
To keep everything else organised, you need to first keep yourself organised.

Start by creating your own Agile board based on a filter that shows everything assigned to you, everything you've reported and everything that you're watching.

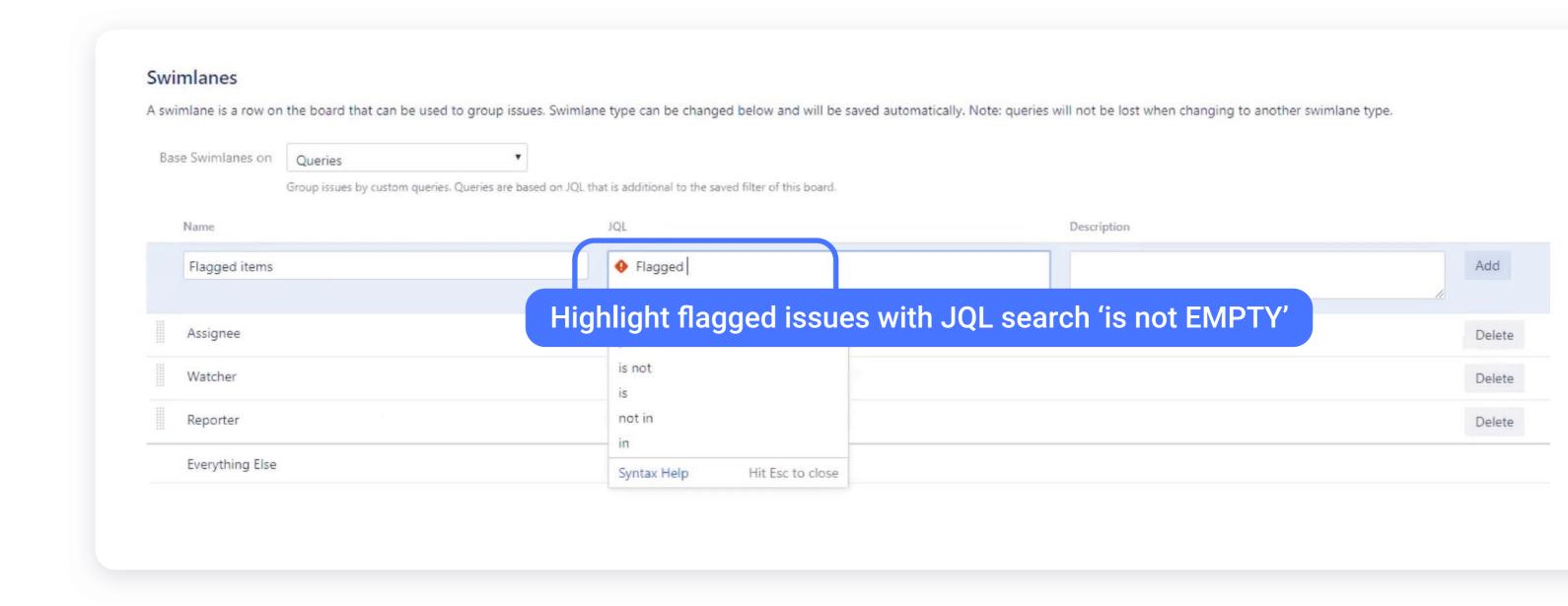


Our advice: Use currentUser in the filter rather than using your own name. That way you can share the filter with other people and it will still work for them.

Next, <u>create 3 swimlanes</u> on your Kanban board. First one with issues that are assigned to you, the second with things that are reported by you, and the third one with things that you're watching.



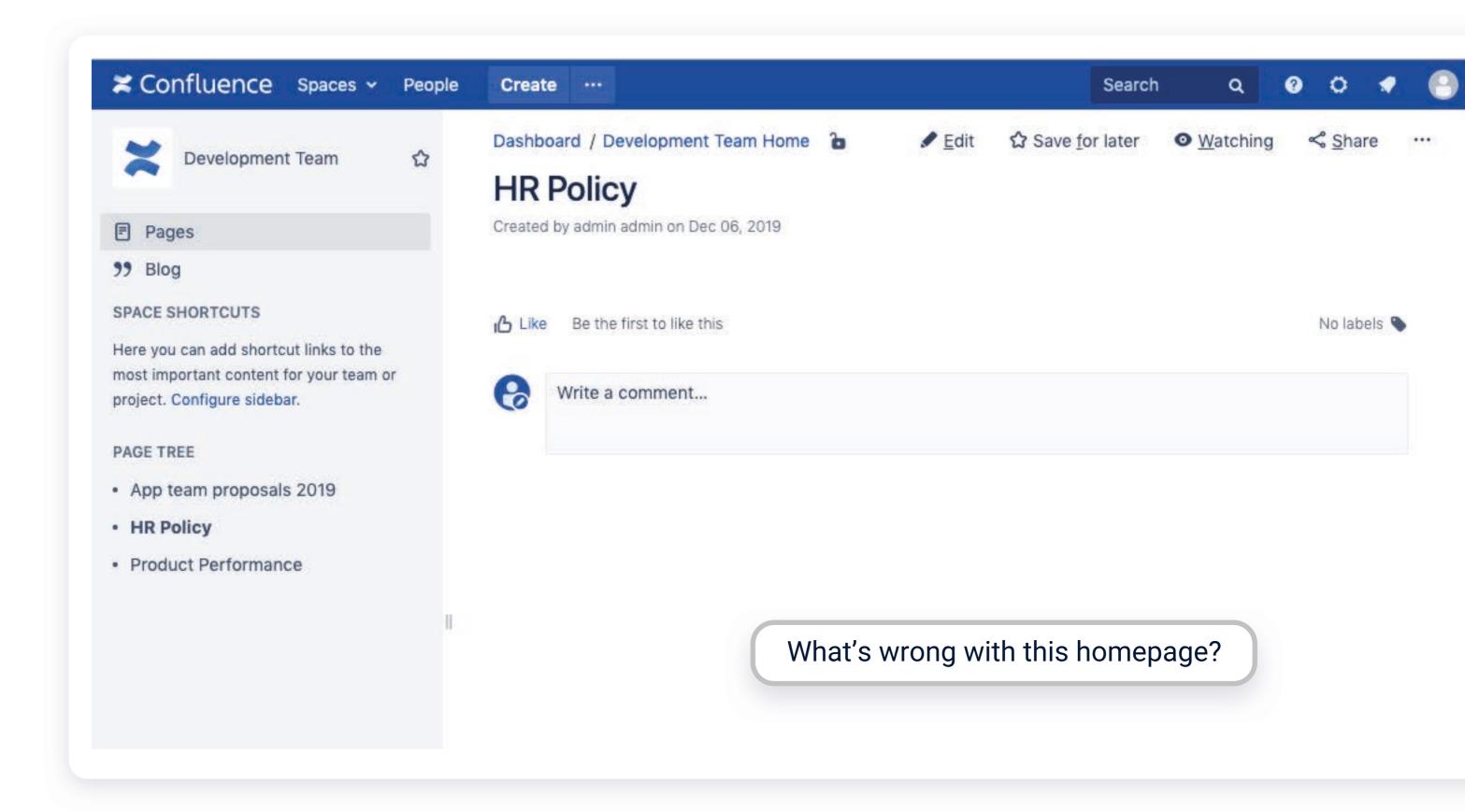
Pushing a bit further, if your teams use the in-built feature of 'Add flag and comment' you will see these highlighted in each swimlane. But it can be more useful to bring them all to the top in a specific swimlane to ensure you swarm on the right events. Simply create a 4th swimlane that highlights the flagged issues using the JQL flagged 'is not EMPTY:





7. Pay attention to the homepage from the beginning

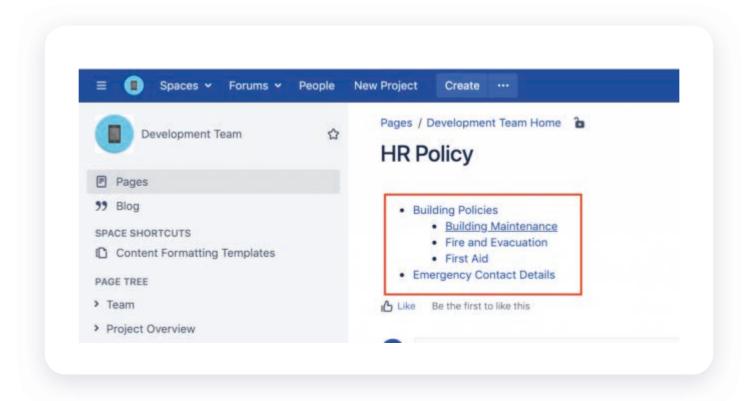
You and your team may know what the space is for when it's first created, but over time, and with more and more content, its purpose can get muddy. A bad homepage means users will either waste time searching for what they need, or they will reinvent the wheel by re-creating content which is already there.



Before you hit 'Create', put some thought into who your users are, what is the bare minimum they need to know about the project and where they need to go next. This information should be well presented on your homepage, and your navigation should be as clear as possible. As a rule, a good homepage should contain 3 things:

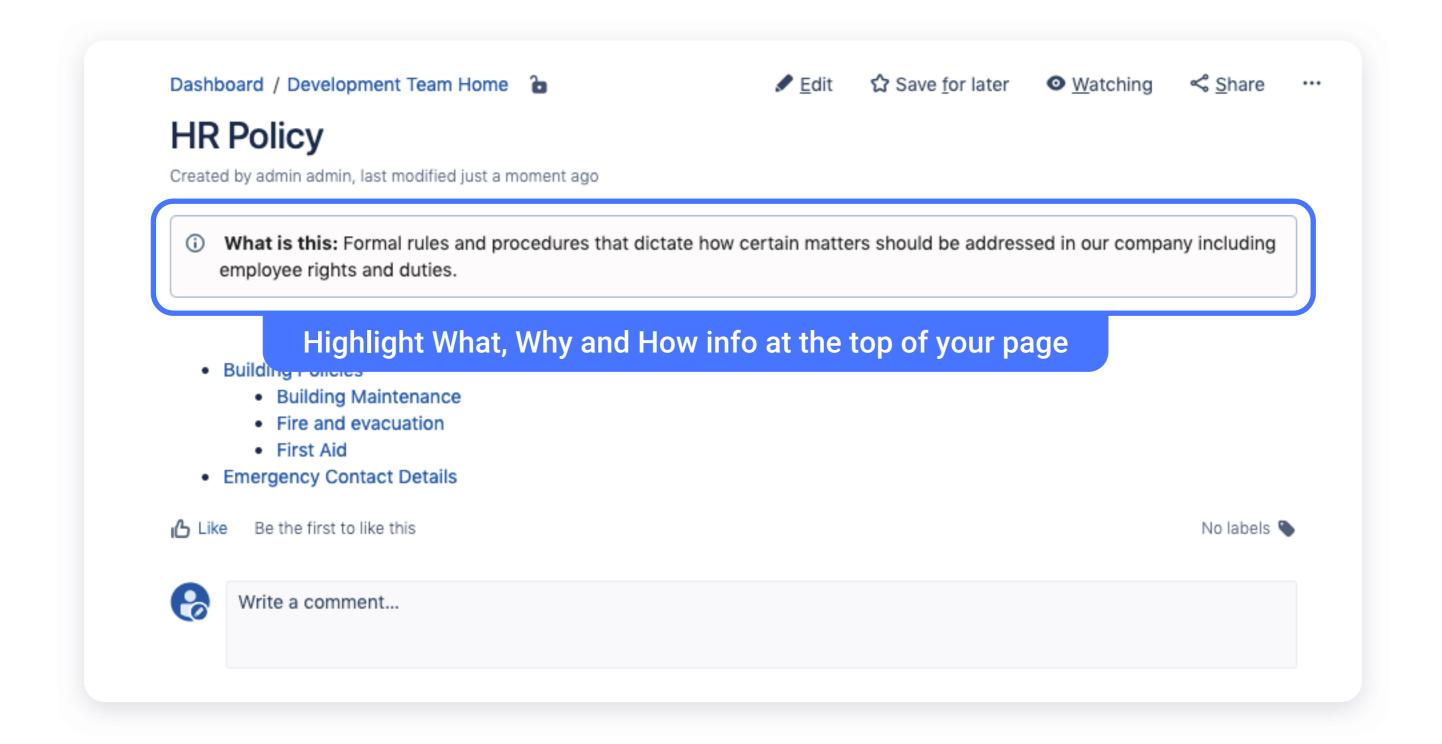
1. A table of contents

You could show a list of child pages in your project hierarchy using the Children Display Macro. Users will understand the relationship between this page and all pages in the hierarchy at a glance. You don't need to show all the pages nested under, the macro lets you choose how many levels to present.



2. A short summary covering 'What is this?', 'Why are we working on it?' and 'How is it going to have an impact?'

You can use the <u>Info, Tip, Note, and Warning Macros</u> to create colored boxes to highlight this info.



3. The content owner name and team

Use the <u>User Profile Macro</u> to display a picture and contact information listed in the team members' profile.

GOING PRO

Record when a person has read a page

Use a third-party app like <u>Forms for Confluence</u> to record when a person acknowledges reading a page, or to ask users to provide feedback by submitting answers to a few questions right on the page. This is very useful for those HR policy and procedure pages where you need to record user having acknowledged the content.

8. Organise and highlight content with labels and macros

Confluence can quickly become a jungle where you waste hours looking for the content you need. <u>Adding labels</u> to pages and attachments makes content easier to group and find. But you should go one step further and use labels to systematise content by collecting related pages together and display them according to your criteria.

Use the <u>Content by Label</u> macro to display lists of pages, blog posts or attachments that have particular labels. For example, you can present a list of page links to all proposals created by your App team in 2019.



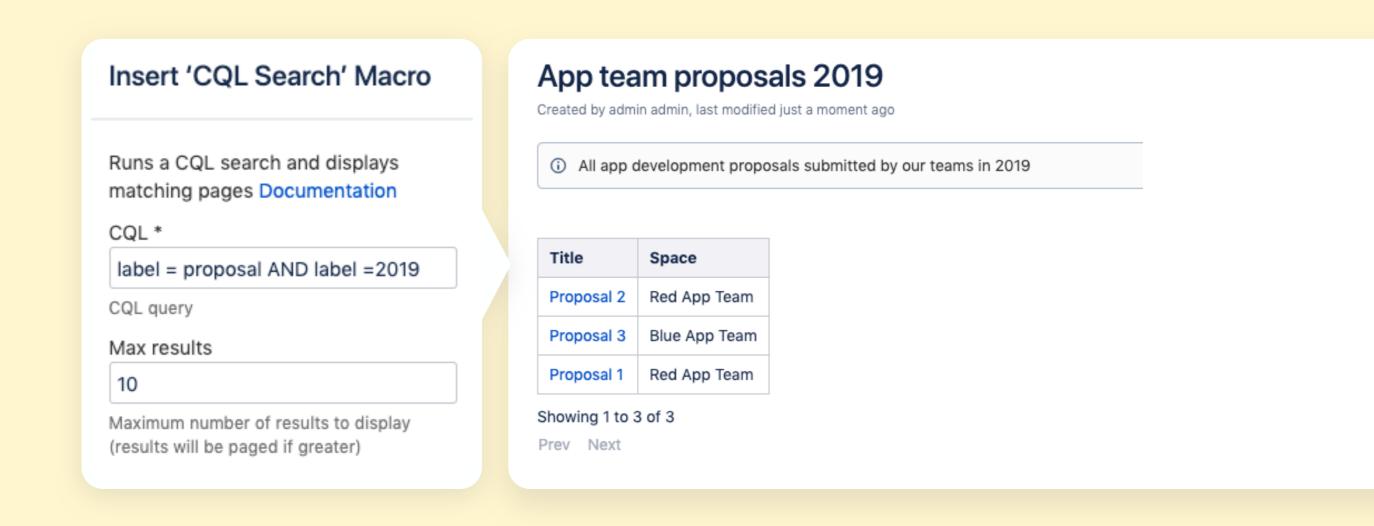


GOING PRO

Use CQL to display info based on complex label combinations

The 'Content by Label' macro displays all content that has a particular label - such as 'proposal'. But in the example above, if other pages were labelled with 'proposal' AND other labels such as '2018', '2019' and you only wanted to see those proposals from 2019, the macro would not filter based on the combination of 'proposal' AND '2019'. It will display all content labelled 'proposal'.

Instead, you could use the <u>Custom CQL Macro</u> in ScripRunner for Confluence to display search results based on complex <u>CQL</u> searches. For the example above, you would use a simple search inside the Custom CQL Macro:



GOING PRO

Manage your labels in bulk

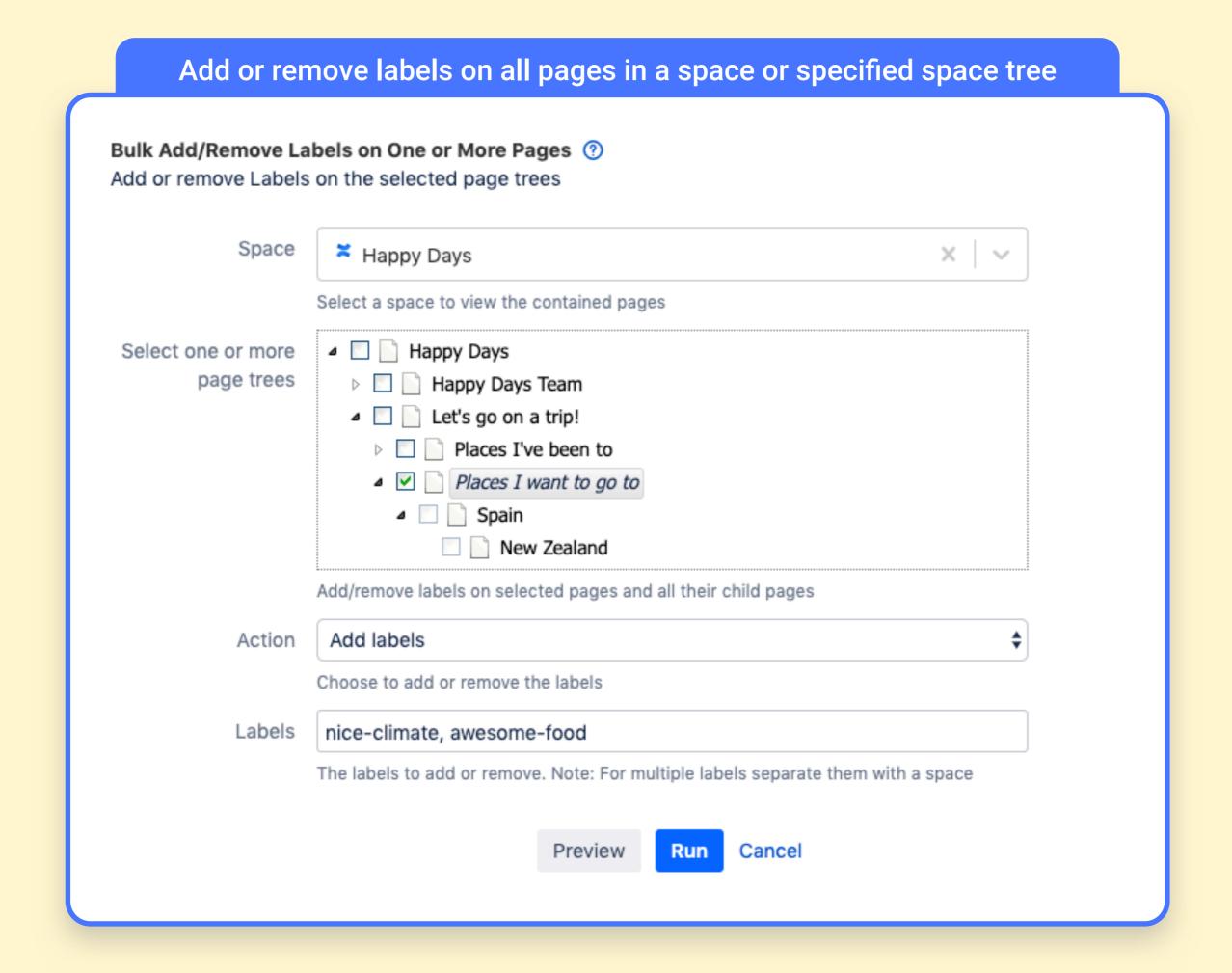
You will not only need to establish and maintain your labelling system, but also manage it and make sure it stays relevant and orderly. Luckily, ScriptRunner for Confluence offers a series of Macros and built-in-scripts allowing you to simplify and automate label management:

Continues

• The <u>Choose Label Macro</u> displays a set of predefined label suggestions for users to pick from, based on the content of the page. You can include the choose label macro on a template, so when your users are creating a page from that template, they can quickly choose the relevant label - in its proper format/spelling, which keeps things properly organized!

Admin-specific:

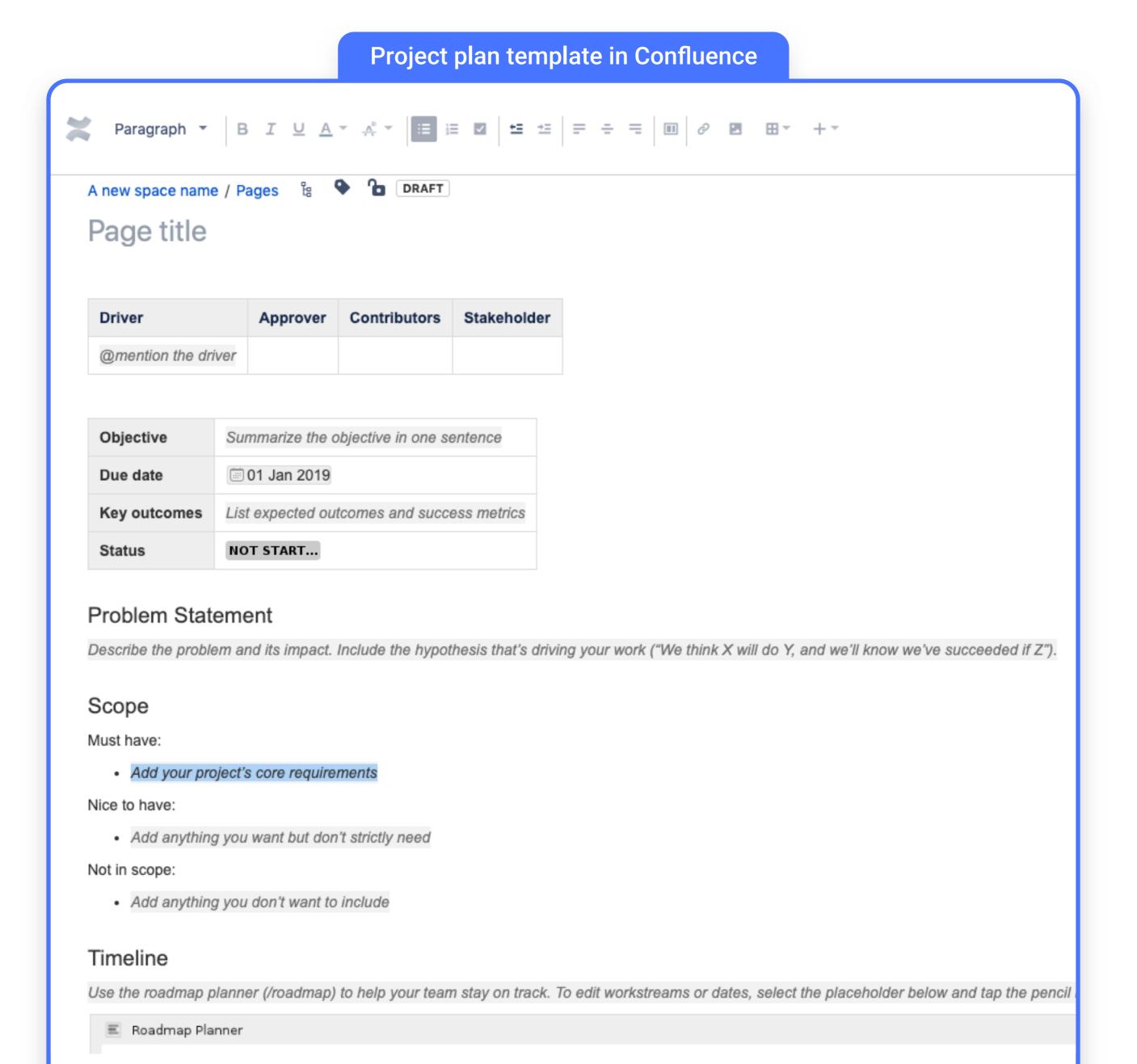
- The <u>Add Label Macro</u> adds specified labels to a page if they are not already present.
- The <u>Bulk Add/Remove Labels</u> built-in script allows admins to add or remove labels on all pages in a space or specified space tree
- The Rename Labels built-in script allows admins to replace the labels for specified spaces or all spaces.



9. Improve structure consistency and content visibility with page templates

The more users you have, the bigger the risk of ending up with pages in as many different styles, formats and locations as you have users. This makes content difficult to find and digest, and can turn users away if they can't find the info they are looking for quickly enough.

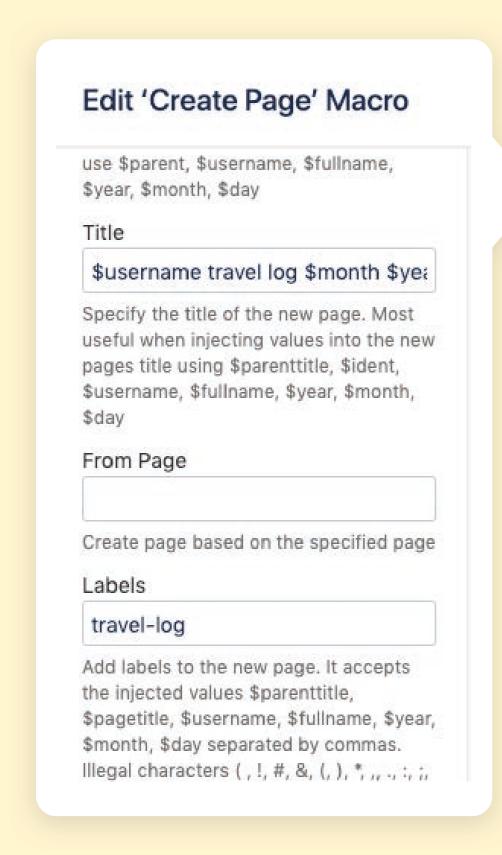
To avoid this situation, make use of <u>Confluence's out-of-the-box</u> <u>templates</u>. This library of pre-made templates and blueprints covers most types of content you will need. Use them out-of the box or as a starting point to <u>create bespoke templates</u> for your various teams. Confluence also allows you to specify page layout, enforce formatting and add suggestions for naming on your page templates.

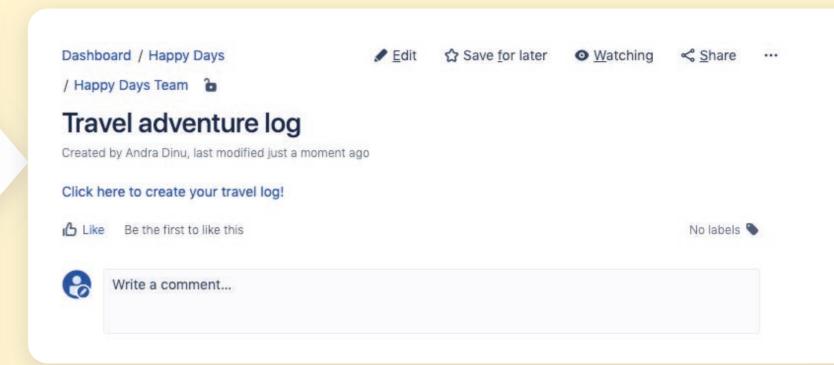


GOING PRO

Help users create pages in the right place, with the right template and with a correctly formatted page title

Using Confluence's templates allows your teams to create content in a consistent way and helps creators "know where to start" with their pages. But you can go further, and offer them extra support and guidance to create pages in the right place in the content hierarchy, with the right template and correctly formatted page title.





The <u>Create Page Macro</u> in ScriptRunner for Confluence is a simple solution that lets users create new pages with a pre-specified template, in a pre-specified location, with pre-added labels, and title suffixes, all at a simple click on a button or link. This way, admins keep the content structure consistent and users save hours of manual updates.

10. Don't stop at page templates, go for entire space templates!

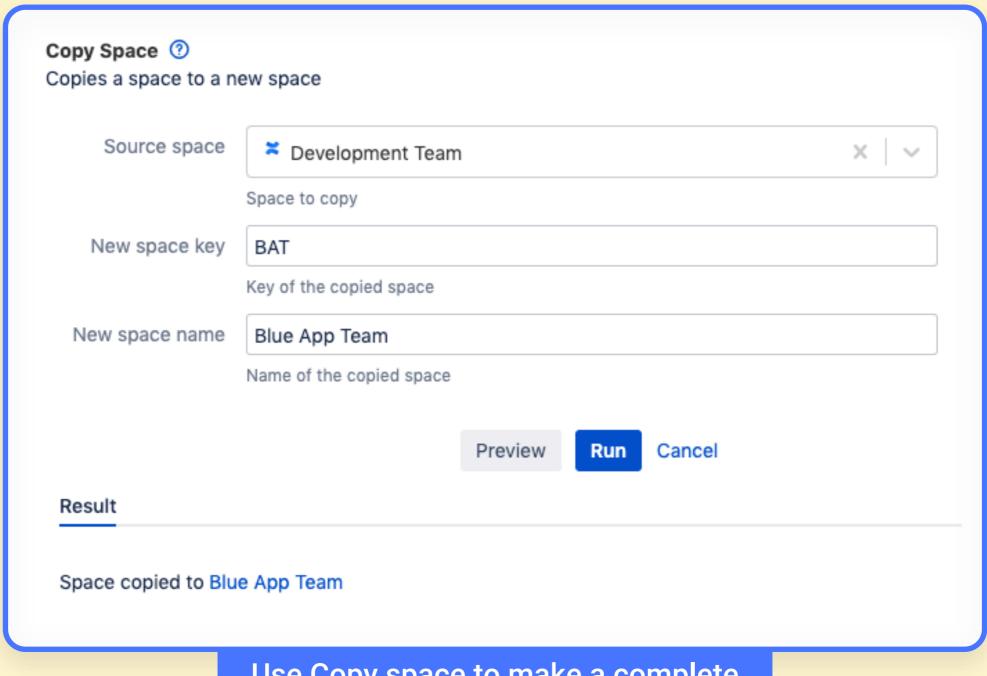
Sometimes, only using page templates is not enough. You can create entire space templates containing hierarchies of parent and child pages to reflect the team processes necessary for your teams to succeed. Once you have your space template nailed down, you can use it over and over again to set up spaces for similar teams.

GOING PRO

Going PRO: Copy an entire space with one click

If you're using out-of-the-box Confluence, the only way to copy an entire space is quite painstaking: you'll have to copy and paste each page of your space into the newly created space. It's painfully time-consuming to do this - especially if the spaces are large and pages include a lot of sections.

The <u>Copy Space</u> built-in script in ScriptRunner for Confluence is an easy and fast way to make a complete copy of an existing space. We recommend creating and using a bare bones space you can use as your model.



Use Copy space to make a complete copy of an existing space

11. Create a Confluence maintenance routineand run it regularly

A regular Confluence cleaning routine doesn't only prevent clutter and keep content discoverable, it also keeps your servers healthy. If left unchecked, the number of pages, links, attachments, videos, gifs that accumulate across your spaces will take their toll on your servers and may negatively impact performance. Here are a few good practices:

 Educate users to put large files in another place and link to these files from Confluence

Our advice: Admins can set <u>attachment size limitations</u> to the instance so users cannot upload large files to Confluence pages.

- Start by identifying problem spaces by looking at size and attachment count
- Use labels to mark those pages that haven't been edited in a long time and list them for review with the space owner or space admin
- Make it a policy to archive or delete this old abandoned content as well as old page versions

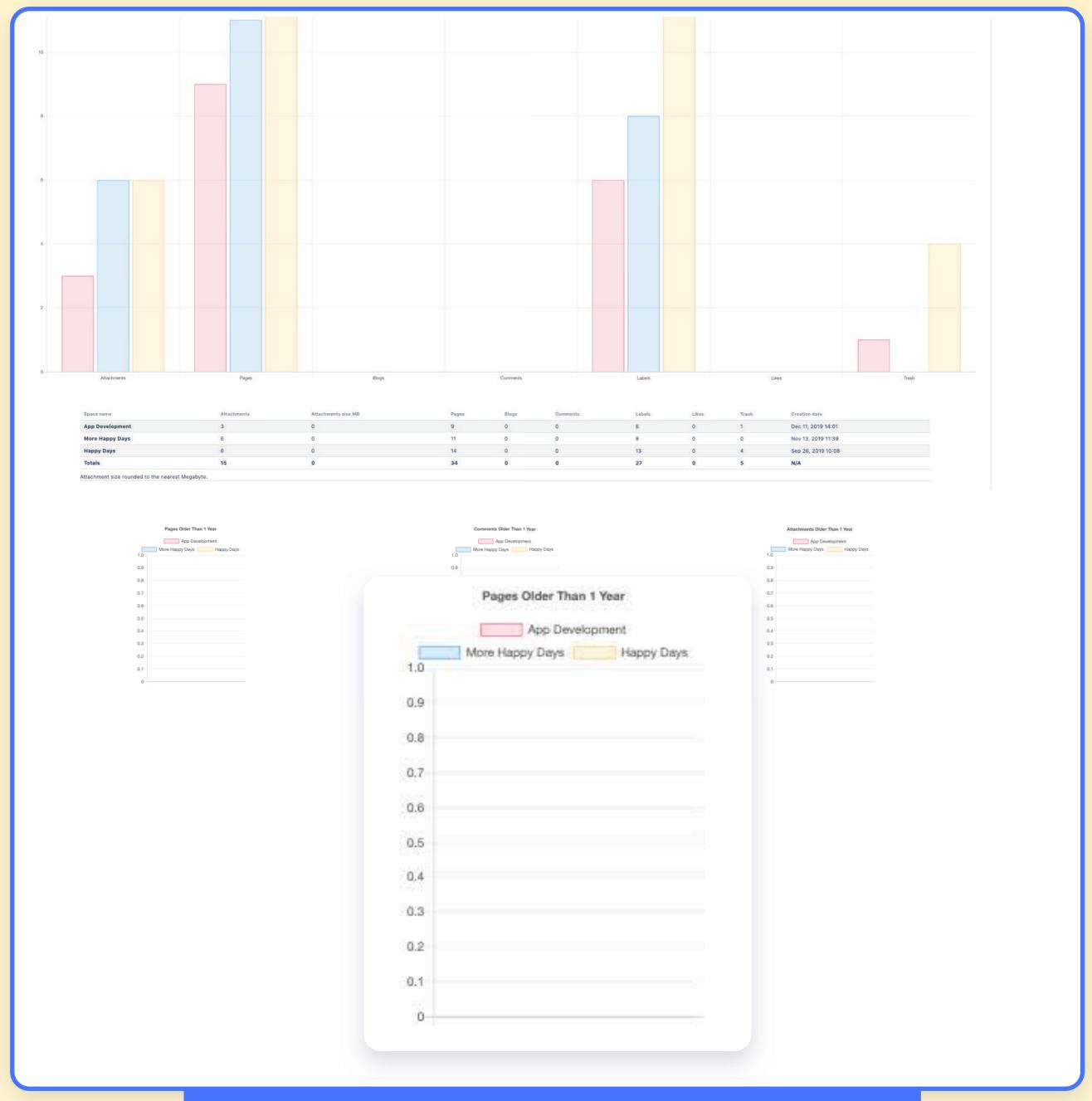
GOING PRO

Build a maintenance routine with bulk actions and automation

The above actions can be painfully time-consuming for an admin if done entirely manually. Luckily, ScriptRunner for Confluence can make things a bit easier:

- Use <u>Space Statistics</u> built-in script to identify the spaces with the largest attachments
- Use the <u>Old Content Notifier</u> to automatically get notified of content that's older than a certain age
- Use the <u>Bulk Delete Attachments</u> and <u>Bulk Delete Comments</u> built-in scripts to delete attachments and comments that are older than a certain age

Continues



Get insights into your spaces with the "Space Statistics" script

Make it completely automated:

- Use the Script Jobs function to create a check that runs regularly, <u>flags</u>
 <u>old pages</u> and <u>tags the space owner or admin</u> to take action
- Create a <u>scheduled job</u> that runs a regular script to archives or delete flagged pages which haven't been actioned after the time has passed:
- Use <u>Prune old page versions</u> to remove old page versions on a regular schedule

12. Foster a code review culture by assigning reviewers to pull requests

Code reviews save time and money, as bugs are recognised and actioned closer to the point of inception, but they are also a great way to build company culture.

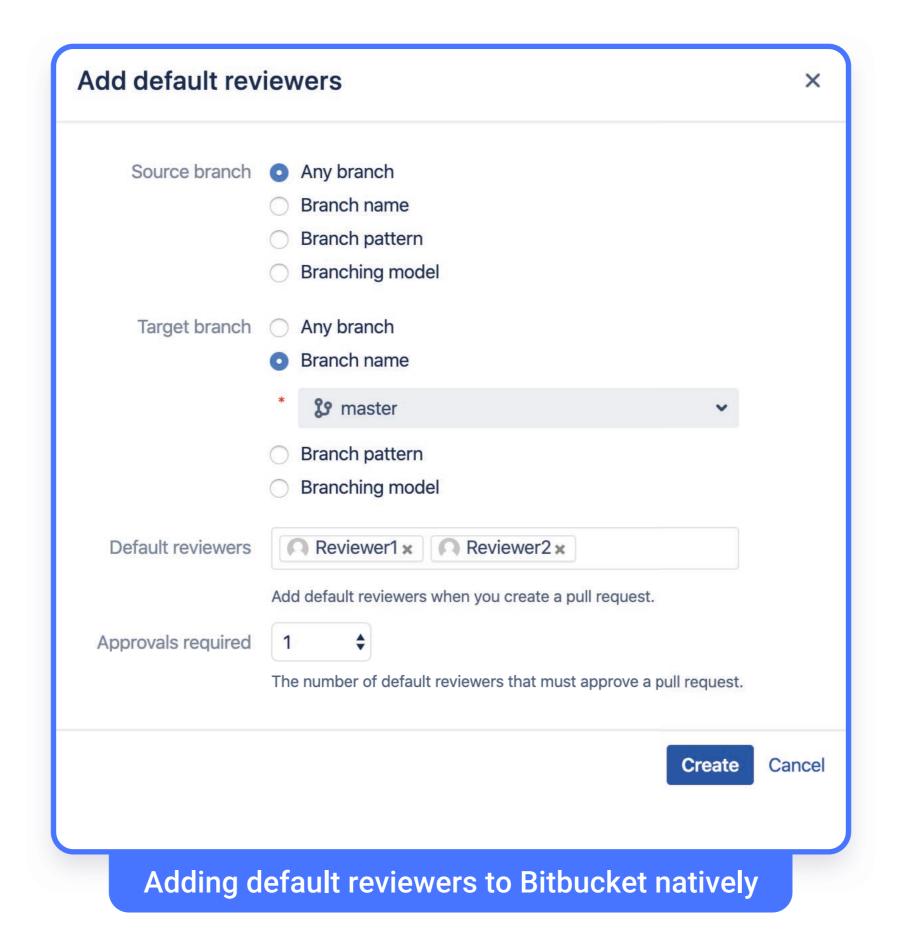
One main take from our own experience is that a company's code review approach should continuously evolve to fit teams' needs. It must also be supported by a set of ground 'human-centric' rules agreed on by the entire team. Here are three examples:

- Any recommendations you make in a code review should be backed up by documentation, formalized guidelines, and common design patterns; your colleagues need to know why they are being asked to make a particular change, and 'because I think/say so' is not an acceptable answer.
- Keep jokes and sarcasm to a minimum in code review comments if you're working in a remote multicultural team, a lot of humour gets lost in translation and in the lack of body-language and comments end up being nonsensical rather than funny.
- Let your colleagues know that you didn't miss any of their points by answering all comments or questions before merging a pull request.

Once you have your ground rules in place, automation can do a lot to help you maintain consistency in your code reviews and to make sure every line of code is actually reviewed. Bitbucket allows administrators to specify default Pull Request reviewers for either all Repositories in a Project, or for individual Repositories.



Below you can see two default reviewers have been added, and one of them is required to approve the Pull Request before it can be merged.



GOING PRO

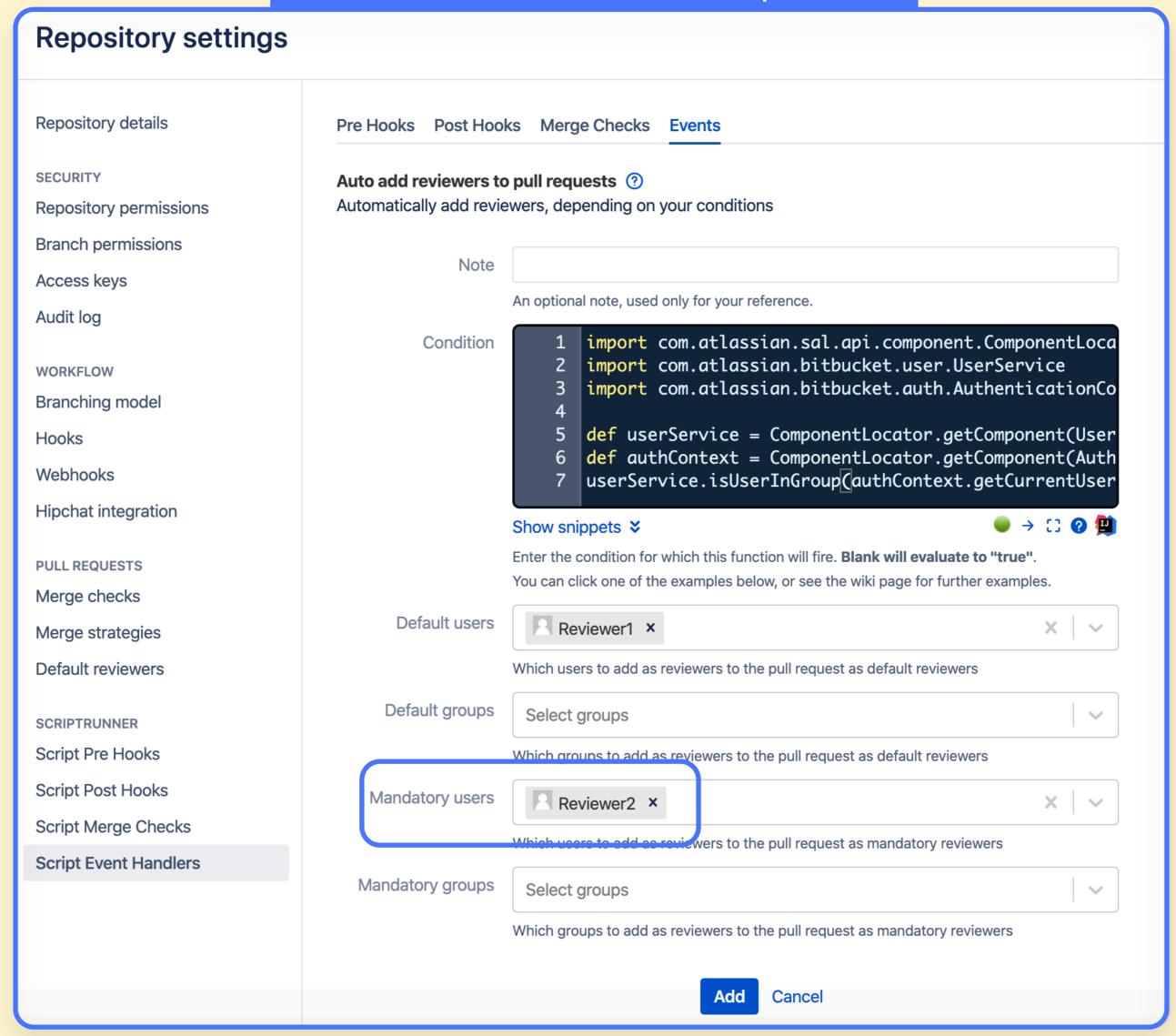
Add mandatory reviewers based on scripted conditions

Many companies working in compliance and regulatory environments have to make sure the right people are reviewing the code. For these companies, but also for other companies that need to enforce more fine-grained control over their code review process, ScriptRunner for Bitbucket offers a series of solutions for enforcing mandatory reviewers:

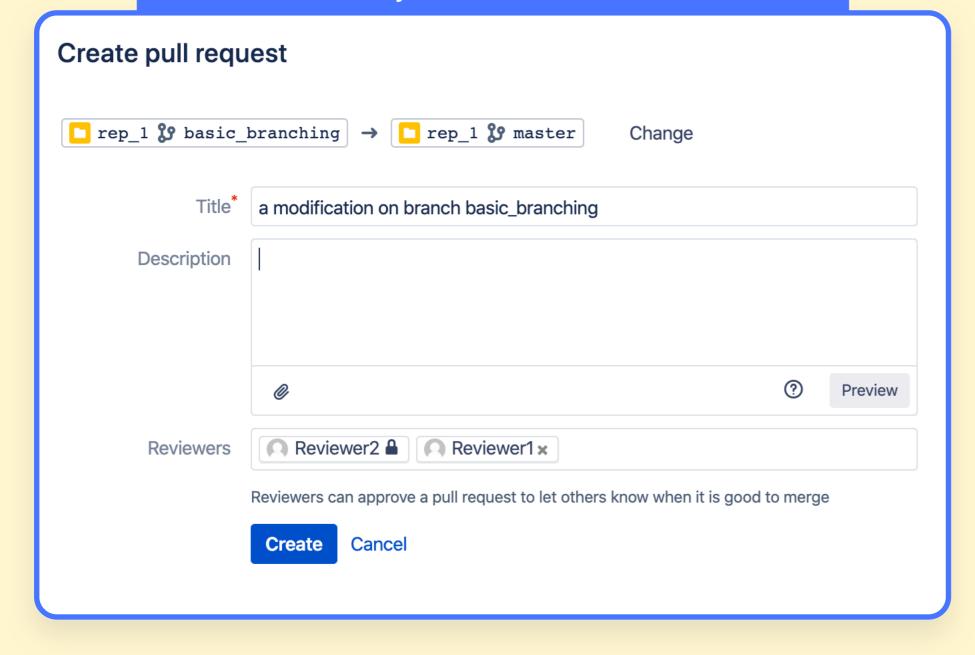
- Reviewers can be made mandatory for a Pull Request.
- Scripted conditions can be set to determine which Pull Requests the default and mandatory reviewers are added to.

Continues

Adding mandatory reviewers with scripted condition for all current and future Repositories



The mandatory reviewer cannot be deleted



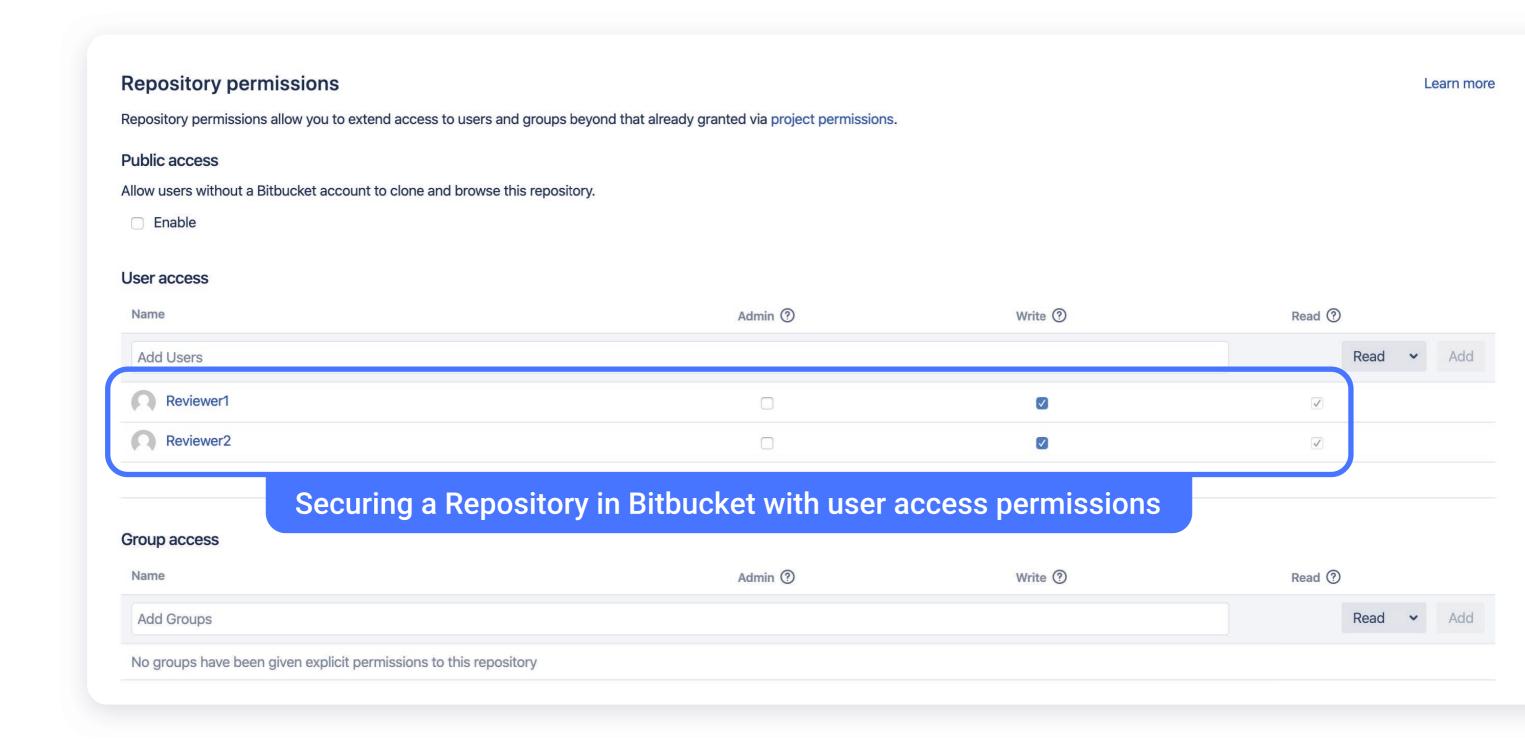
Finally, the Projects
 and Repositories this
 configuration is applied
 to can be set at the
 administrator level or the
 configuration added
 directly to an individual
 Repository.



13. Secure your repositories with user access permissions

If you have a large team, are there any chances that somebody might push to the wrong repository? If you work with contractors, how safe is it to give them more access than they strictly need?

Bitbucket lets administrators manage access to their repositories in a number of ways, either by <u>granting user or user groups Admin (1), Write or Read access for an entire project (2)</u>, or <u>for individual repositories</u> - this is especially important for large teams working in regulated environments.

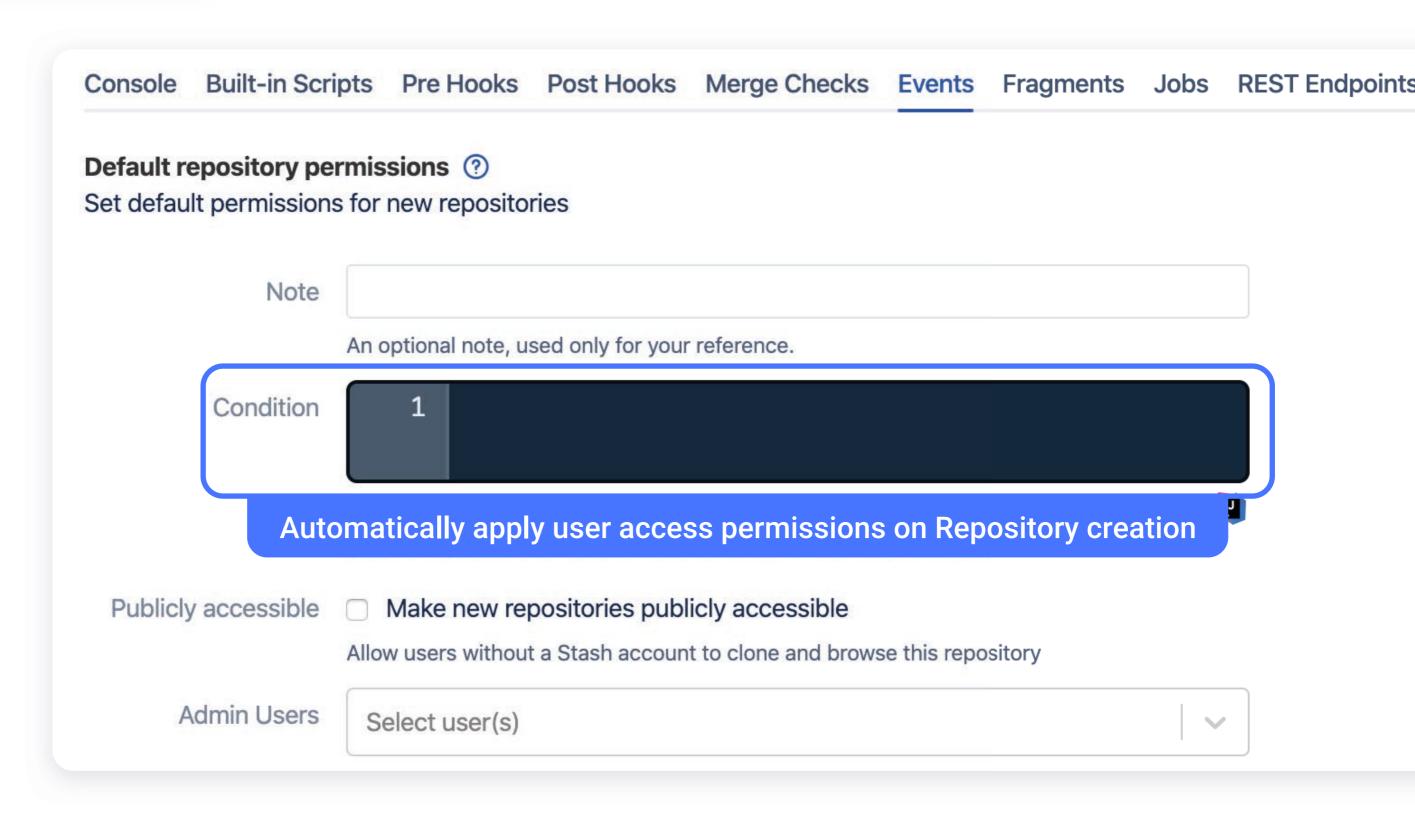


GOING PRO

Going PRO: Automatically apply the required Repository permissions on Repository creation

As an admin, you can be sure that whenever a Repository is created, it always has the appropriate user access automatically applied to it by using Default Project/Repository Permissions in ScriptRunner for BitBucket.

Continues



Our advice: When it comes to keeping things safe, companies often invest a lot in securing against complex attack vectors, but completely forget the simple things, such as passwords lying around on sticky notes and people who are no longer employees but still have access to the company's assets. Remember to always deactivate Bitbucket users once they no longer need access to the instance!

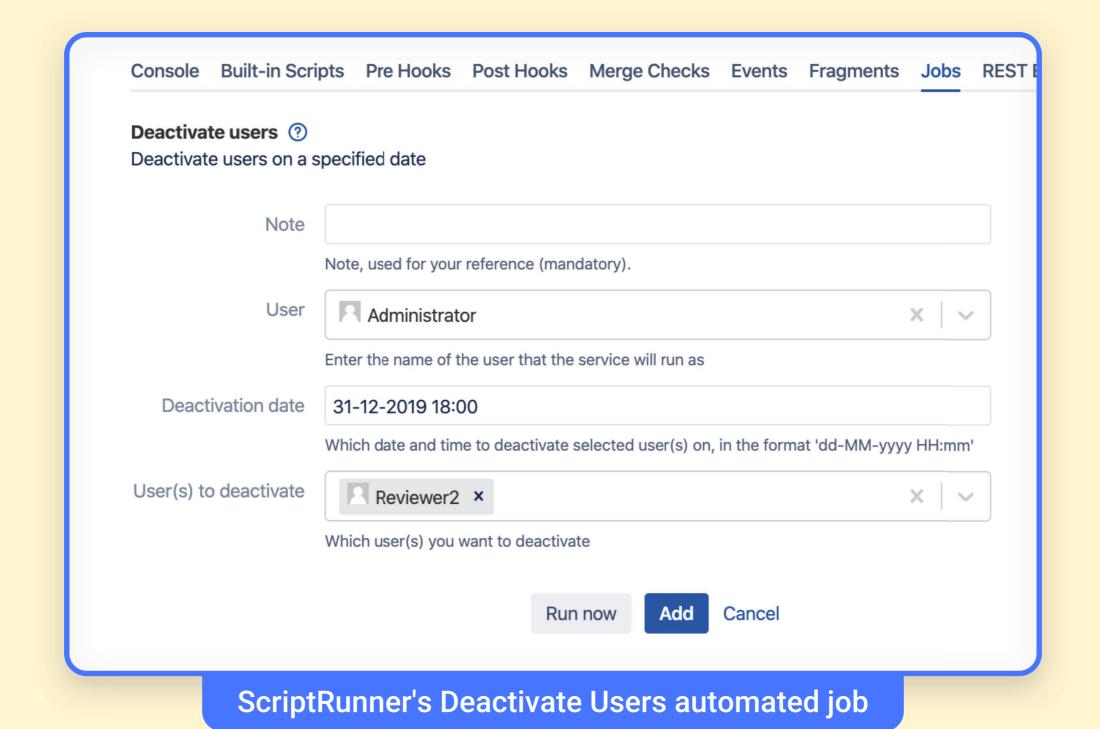
GOING PRO

Automatically deactivate old Bitbucket users

Using Bitbucket out-of-the box, an administrator would need to manually deactivate users once they no longer work for the company.

Using ScriptRunner for Bitbucket, the administrator can <u>configure an</u> <u>automated job to perform the deactivation at the required time</u>, on their behalf - ensuring the deactivation actually happens.

Continues



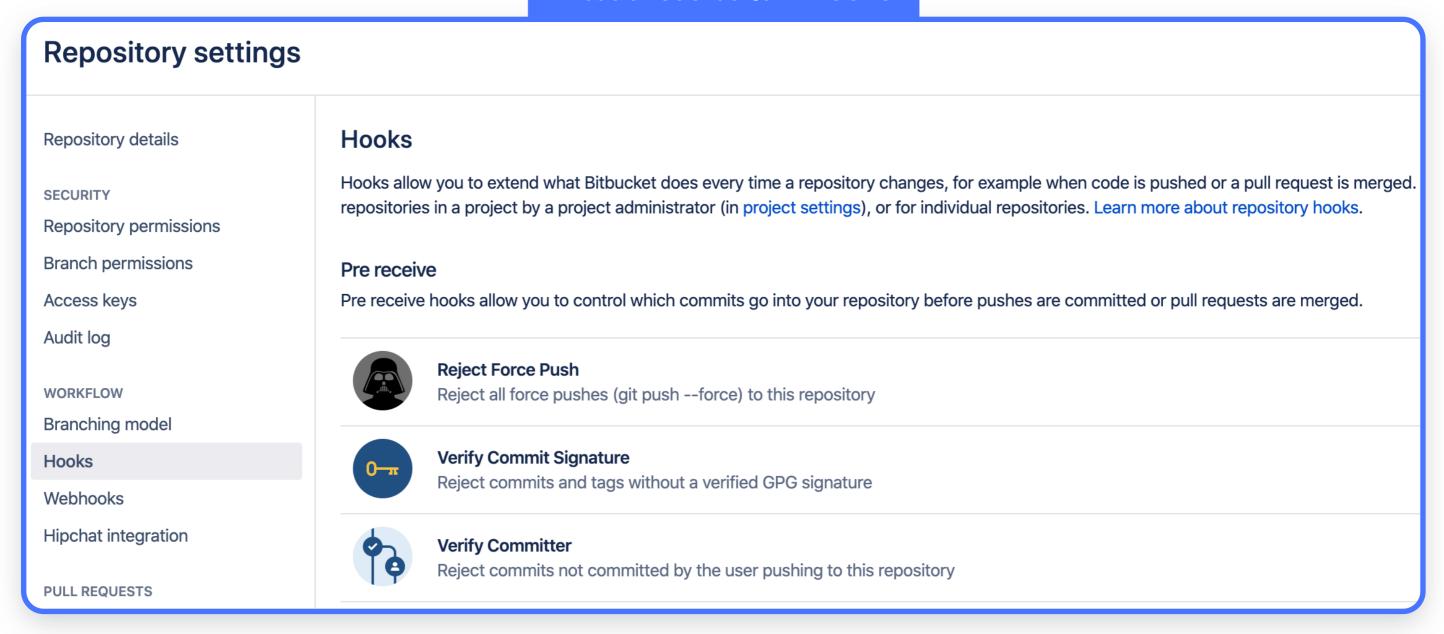
14. Avoid traceability issues and encourage correct development process using Hooks and Merge Checks

Many companies have strict development processes that forbid forcepushes, but accidents can always happen. One accidental force-push to the shared repository will result in a rewrite of the Git history, which can cause an endless string of traceability troubles for any company operating in a regulated industries.

Bitbucket Server comes with a number of <u>built-in Hooks</u> and Merge Checks to help enforce them. For example, Reject Force Push will reject all force pushes to a repository. Bitbucket's pre-receive hooks are installed by default but disabled, you can enable them on all repositories in a project, or on individual repositories.



Bitbucket's built-in hooks

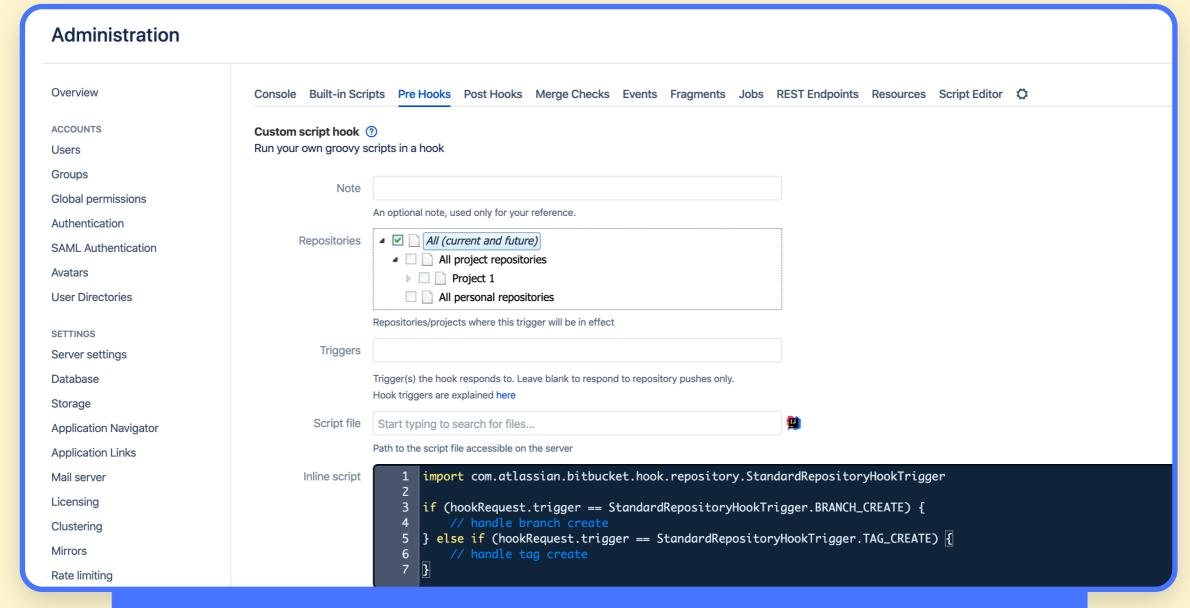


GOING PRO

Use bespoke hooks and merge checks to make sure your development process is respected

Based on popular user demands, ScriptRunner for Bitbucket offers an array of built-in hooks and merge checks that go beyond Bitbucket's default capabilities. You can even create your own custom hooks and merge checks. Here's a few of our built-in hooks and merge checks:

- Automatically require that <u>all commits are associated with a Jira issue</u>
- Enforcing the <u>naming standards of Branches and Tags</u>
- Restricting the <u>size of files that can be committed to a Repository</u>
- Enforcing <u>only trusted authors are able to make commits</u>



Create your own custom pre-hooks using ScriptRunner for Bitbucket

Want to know more?



About Adaptavist

We are proud to be recognised as the world's largest Atlassian services provider. 75% of Fortune 500 companies use our products and services; our products alone are used by over 15 million users in over 30000 companies.

We help deliver competitive advantage from software. Talk to us if you want to dramatically improve how you plan, deliver and manage your information technology assets, software and processes.



About ScriptRunner

The ScriptRunner apps offer Atlassian admins a complete toolset for completely customising, automating and expanding their Jira, Confluence or Bitbucket instances.

ScriptRunner's powerful Script Console gives you direct access Atlassian's API, which opens up a staggering amount of functionalities. You don't need to write code to access many of these features. The ScriptRunner add-ons have a vast array of no-code based on the most common use-cases - you've seen a few of them exemplified above.

To implement very complex, bespoke automations or customisations, you can run Groovy scripts inside ScriptRunner. ScriptRunner has a very large and active user base, so you will find a lot of help and ideas for your scripts under the ScriptRunner tab in the Atlassian Community or in the Adaptavist Library - a free resource containing a lot of ready-made scripts you can just copy and use.

Our Contributors



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AND ATLASSIAN EXPERT

Phill is an expert in delivering client-focused solutions to some of the world's largest enterprise clients.

His skill set includes software lifecycles, project management, internet and GIS expertise, database design and maintenance, enterprise solutions, interoperability, leading delivery teams, ITIL, delivering service and methodology transitions.



Ravi Sagar

AUTHOR OF MASTERING JIRA, AND MASTERING JIRA 7 ATLASSIAN CONSULTANT, TRAINER, AND DEVELOPER AT ADAPTAVIST

Senior Atlassian Consultant at Adaptavist with 17 years of experience. He has extensive experience in implementing and customising big Jira instances for Project Tracking, Test Management, Support Tickets and Agile tracking and specialises in full and partial consolidation/migration of Jira/Confluence projects/spaces respectively. Ravi is an excellent communicator with a passion for learning and sharing experience.



Jill Patterson

PRODUCT MANAGER SCRIPTRUNNER FOR CONFLUENCE ATLASSIAN TRAINER AND CONSULTANT

Jillian is an accomplished Atlassian practitioner with expert knowledge of Agile methodologies and project management principles and practices. Her extensive work in the space has culminated in a move to product management where she is applying her passion of delivering value to customers through usable, innovative products. Jill strives to ensure the best solution is achieved through productive creativity.



Robert Giddings

LEAD DEVELOPER
SCRIPTRUNNER FOR BITBUCKET

Rob is an experienced and enthusiastic software developer, with experience on all aspects of software development and the Atlassian ecosystem. He's an advocate of Agile, DevOps and Continuous Deployment/Delivery methodologies, with experience using Amazon Web Services and the Atlassian set of tools.