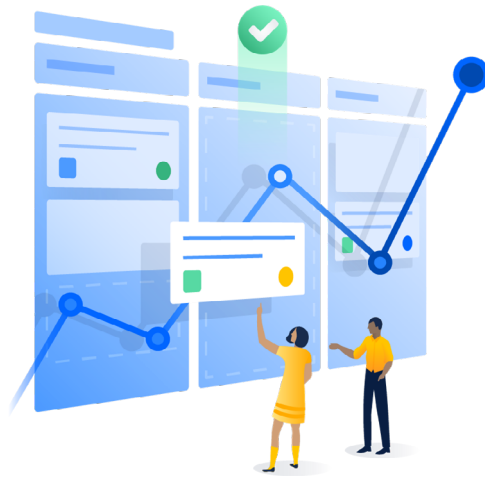# Be a Jira Hero

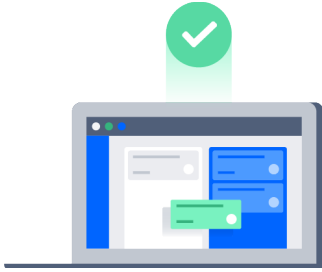A guide for Admins, by Admins

INTRODUCTION

One of the best things about Jira Software is how customizable it is. But on the flip side, that same level of flexibility can be a lot to digest if you're new to Jira. That's why we put together this guide full of tips and tricks – curated from actual, real-life Jira admins.

Whether you're a seasoned Jira admin or signing up for the very first time, these best practices, tips, and shortcuts are aimed to help you setup and maintain the most efficient Jira instance possible. Because, an efficient and intuitive Jira instance translates to happy Jira users who actually enjoy logging in and updating their work. Win win!

Most, but not all, of these best practices are deployment agnostic; meaning they're generally applicable whether your Jira is on-premise or in the Cloud (the UI may differ slightly across Jira versions, however). Nervous to experiment too much in a live Jira instance? Remember, you can now use Jira Software Cloud for free: sign up now. Consider it your team's free Cloud sandbox! Now, onto the good stuff!

Table of Contents

01

Keeping Jira clean and simple for your users

1 **Understand your users' behavior**

Before even touching anything in the Jira tool, 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 to Jira is a great first step to making work more streamlined.

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 PM does!)

3 Beware of over-customizing Jira. Reuse as much as you can.

For 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. Here's how.
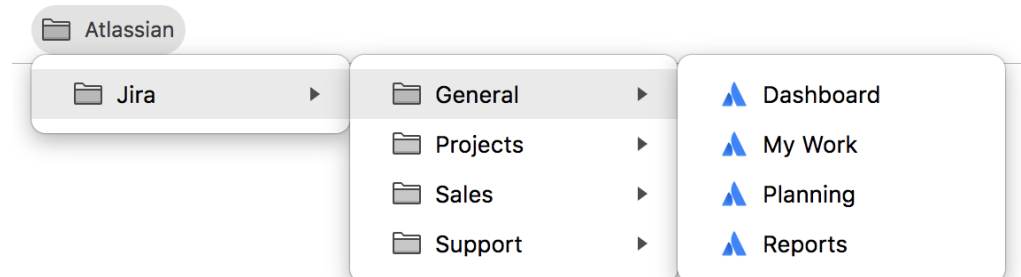
4 Make Jira a place you'd want to visit

Invest time to make Jira feel "homey" for users by keeping it colorful and tidy by setting your corporate colors and icons. Here's how.

5 Bookmark your most important screens

CLOUD

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.
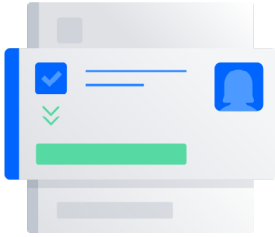
Home sweet home!

Tip #4   **Make Jira a place you'd want to visit**

Invest time to make Jira feel "homey" for users by keeping it colorful and tidy by setting your corporate colors and icons.

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 field where possible, but using keywords will make the issue easier to search. You should also incorporate important points from comments to the description field - this makes life of implementer easy.

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 field where possible, but using keywords will make the issue easier to search. You should also incorporate important points from comments to the description field – this makes life of implementer easy.

9   Link related issues to each other

Just be sure to assign 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

Set up approvals for subtasks to prevent users from moving tasks to done until all sub-tasks are complete. Automation rules are great for this.
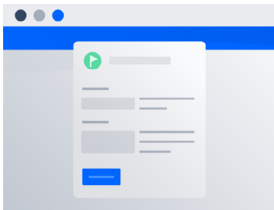
03

Custom Fields & Screens:
Less is more

11   Resist the urge to add multiple issue fields and integrations

Adding too many issue fields causes Jira issues to load slower and more difficult to manage - 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 super-specific field that will only get 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?"
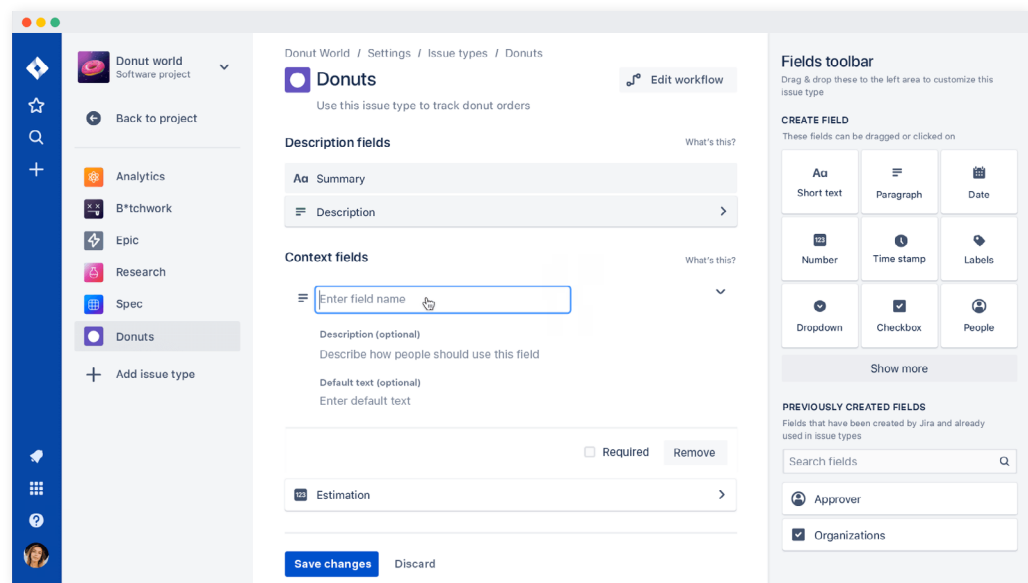
13   Use tabs to group related fields

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 transitions points that prompt users to enter info at specific points in time. Not all the fields need to be mandatory, but this is an opportune time to remind the user to fill in all the relevant information they have (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 super-specific field that will only get 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?"
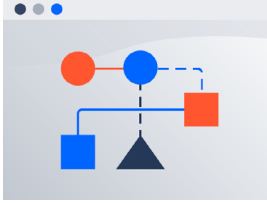
04

Workflows

15 **Before setting up a project answer these questions**

What are you trying to accomplish? Who is the audience? What can streamline your experience? It may sound basic, but aligning on these questions will help you down the road. You can start with MVP board and build on there.

16 **No one project fits all**

Boards are only as important as the information you put into them. Being strategic about which information you add will go a long way towards making your project a success. 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 having mapped every relevant status for you.

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

> **PRO TIP** | Add a date/time field that autofills on transition because you can 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 being introduced during the life of the issue
- Time elapsed
- Responses received from other systems.
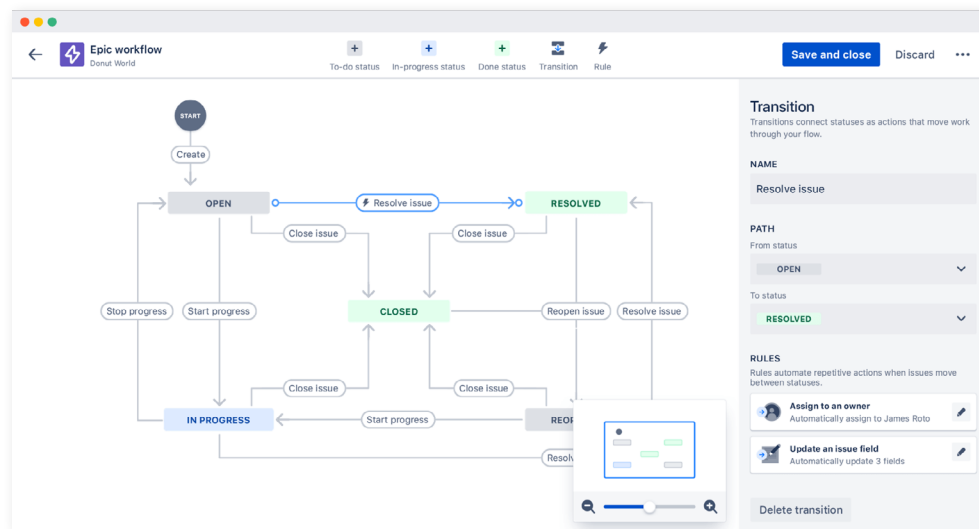
19 Use transitions in workflows

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

KEEP

WORKFLOWS

SIMPLE
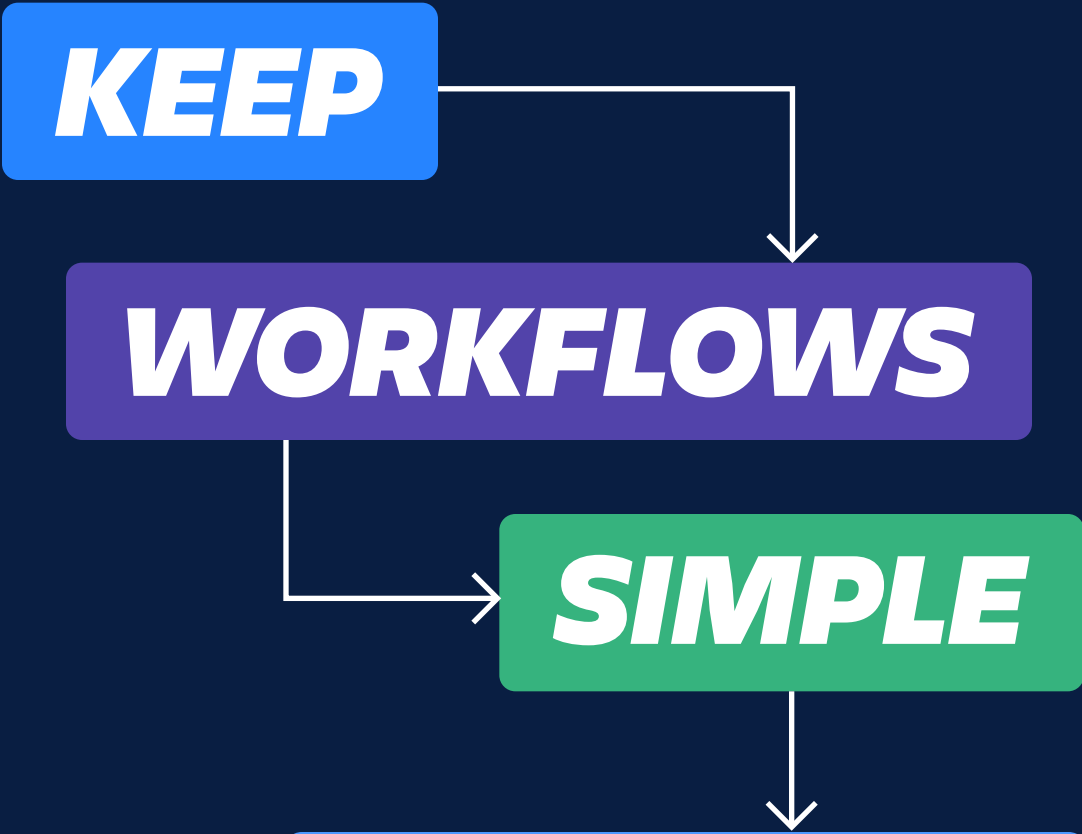
Tip #18

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

Either use a post-function to set the Resolution when transition to Done (ensure a resolution is set on the final step or you'll find end up with issues that are Done but not Resolved) or present the field in a transition screen for selection.

21 Consider versioning workflows

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

- If there are many interrelated changes to make, you can get them all done and apply all at once, especially if some stuff breaks other stuff until all the things are done.

- 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:

1. 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)

2. Make the changes on the new version just created but not yet in production

3. 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.
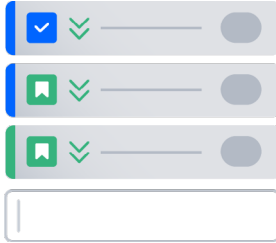
05

Backlog

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

This becomes an arduous task down the road if done incorrectly or not at all.

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

CLOUD

- 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**

Subscription provides you with a periodic notification for all issues returned by the search. 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 fairly 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**

JQL (Jira Query Language) is an advanced search that allows you to specify criteria that you can't define in the 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**

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 tons of information in multiple ways.

For example:
You can create a 2-dimensional chart of issues completed by application (a custom field), and show it graphically with a pie chart – making it super easy for management teams to understand and act on.

28 Add context to roadmaps & reports in Confluence

Jira macros in Confluence (sometimes embedded in other macros) allow reporting and documentation to be in a home suited to it and allow you to add written context to help explain the data being presented.
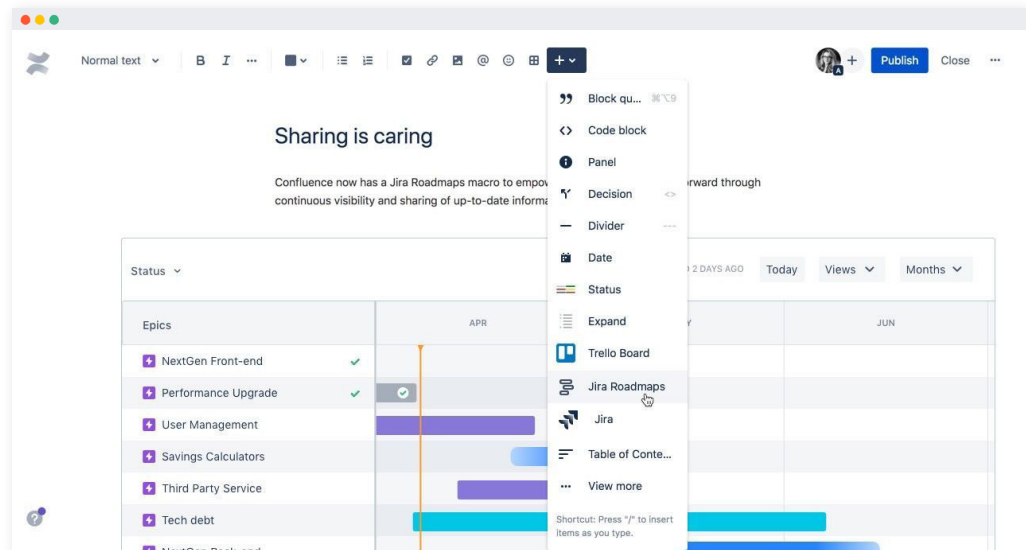
You can now embed live roadmaps from Jira in Confluence. When updates are made to the roadmap, those updates come through in real-time in Confluence.

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!

30 Save time with Saved Reports

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

08

Shortcuts & Hacks

31   **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.

32   **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

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.

09

Automation

Add advanced automation capabilities to Jira Software via Automation for Jira.

33 **Create recurring activities on a schedule**

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

34 **Keep parent and sub-task issues in sync**

Keep your boards tidy, like when a user resolves the last sub-task on an issue, you can automatically resolve the parent. Learn more.

▶ **Watch the video**

35 **Auto-assign issues to your team**

Make sure work gets completed in a timely manner by setting up an automatic allocation process. Learn more.
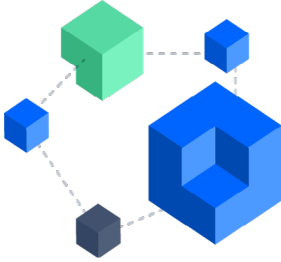
10

App recommendations

Below are the apps suggested by your fellow Jira admins. For more on choosing the right app for each team type, check out this page.

Notfications

Add Notification Assistant to make lots of nice 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.

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. Discuss Jira in person at your local
   Atlassian Community Event (ACE).

2. Learn more from our massive online Community.

3. Add you're own Jira tip on the original Atlassian
   Community post.

ATLASSIAN