ATLASSIAN

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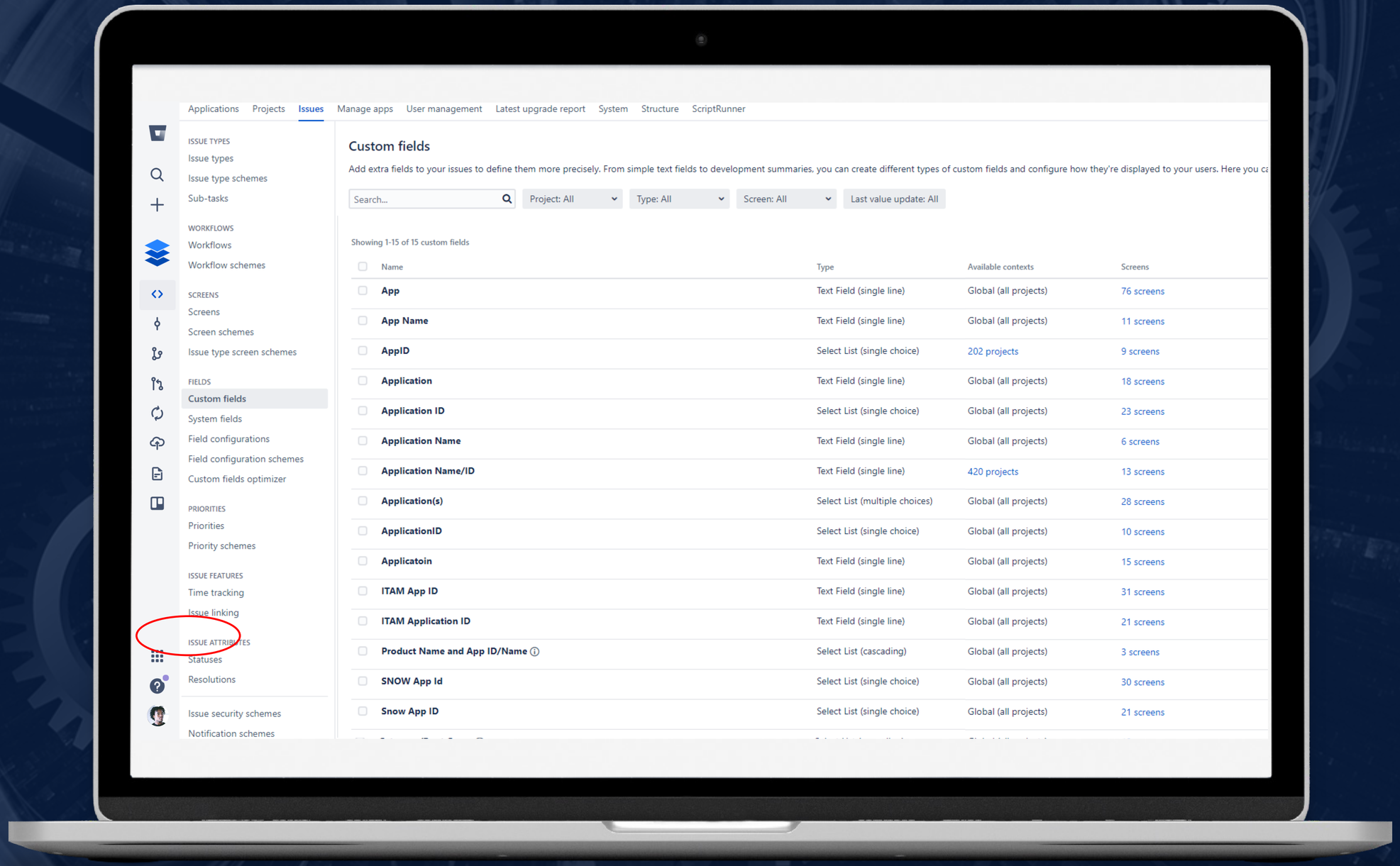
The Sole Survivor

How Fidelity Investments reduced Jira customizations by 99%

CAROLINE SMITH | DIRECTOR, AGILE TOOLS SQUAD LEAD |

Let’s rewind the
clock back to 2009


Applications
Projects
Issues
Manage apps
User management
Latest upgrade report
System
Structure
ScriptRunner
ISSUE TYPES
Issue types
Issue type schemes
Sub-tasks
WORKFLOWS
Workflows
Workflow schemes
SCREENS
Screens
Screen schemes
Issue type screen schemes
FIELDS
Custom fields
System fields
Field configurations
Field configuration schemes
Custom fields optimizer
PRIORITIES
Priorities
Priority schemes
ISSUE FEATURES
Time tracking
Issue linking
ISSUE ATTRIBUTES
Statuses
Resolutions
Issue security schemes
Notification schemes
Custom fields
Add extra fields to your issues to define them more precisely. From simple text fields to development summaries, you can create different types of custom fields and configure how they're displayed to your users. Here you ca
Search...
Project: All
Type: All
Screen: All
Last value update: All
Showing 1-15 of 15 custom fields
Name
Type
Available contexts
Screens
App
Text Field (single line)
Global (all projects)
76 screens
App Name
Text Field (single line)
Global (all projects)
11 screens
AppID
Select List (single choice)
202 projects
9 screens
Application
Text Field (single line)
Global (all projects)
18 screens
Application ID
Select List (single choice)
Global (all projects)
23 screens
Application Name
Text Field (single line)
Global (all projects)
6 screens
Application Name/ID
Text Field (single line)
420 projects
13 screens
Application(s)
Select List (multiple choices)
Global (all projects)
28 screens
ApplicationID
Select List (single choice)
Global (all projects)
10 screens
Applicatoin
Text Field (single line)
Global (all projects)
15 screens
ITAM App ID
Text Field (single line)
Global (all projects)
31 screens
ITAM Application ID
Text Field (single line)
Global (all projects)
21 screens
Product Name and App ID/Name
Select List (cascading)
Global (all projects)
3 screens
SNOW App Id
Select List (single choice)
Global (all projects)
30 screens
Snow App ID
Select List (single choice)
Global (all projects)
21 screens

Why do we care?

Performance	Reporting & analytics	Administration	Integration with other tools
Consistent processes	Usability	Improve exports	Migration to cloud

Our setup

Jira Data Center

5,000 projects

30,000 users

What did we consolidate?

Workflow status	1418	12	Screens	3685	154
Custom fields	2008	103	Issue types	466	14
Workflows	2228	1	Roles	68	5

This works for us.

Why change something that is not broken?

We are too busy to change.

Removing Custom Fields – what

Removing Custom Fields – how

1. Engage key users/admins
2. Create generic/ miscellaneous fields
3. Copy data to alternative field with Script Runner
4. Add “To be decommissioned” description
5. Disable drop-down and add “To be decommissioned”
6. Rename with “Do not use!” suffix
7. Remove from screen
8. Remove from search
9. Add Jira banner
10. Permanently delete

Project Configuration

Additional Workflow Steps

- Testing
- Review
- Ready

Agile Methodology

Kanban

Jira Align Integration Enabled

Yes

Required Fields

Acceptance Criteria

Lessons learned

Start with low-hanging fruit.	Limit number of admins.	Put guardrails in place.	Create templates for all new projects.
Archive old Projects.	Use listener to only clone certain fields.	Use marketplace apps to help.	There is great satisfaction in this work.

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