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# Empower anyone to be a Jira Service Management admin



**JEHAN GONSALKORALE | SENIOR PRODUCT MANAGER | @JEHAN\_GONSAL**

# Spot the Jira admin

Q: Which person is the Jira admin?

**Darth Vader**

*Head of IT*

**Grand Moff Tarkin**

*Marketing manager*

**General Veers**

*Senior data scientist*

**Moff Gideon**

*CFO*

**ANYONE CAN BE A JIRA  
SERVICE MANAGEMENT ADMIN**

**BE THE **ENABLER**,  
NOT THE ADMIN.**



## LET'S LOOK AT AN EXAMPLE

---

Captain Piett is a Jira Service Management admin struggling with his workload.

# ***You are in command now, Admiral Piett!***

I want my  
service desk,  
not excuses!

Don't make  
me call  
Heisenberg!

*IT admins*

*Marketing*

*IT support*

*Analytics*

*Finance*



But sharing  
admin rights  
is **dangerous**.

Too many custom fields

This can slow down your instance.

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Breaking things

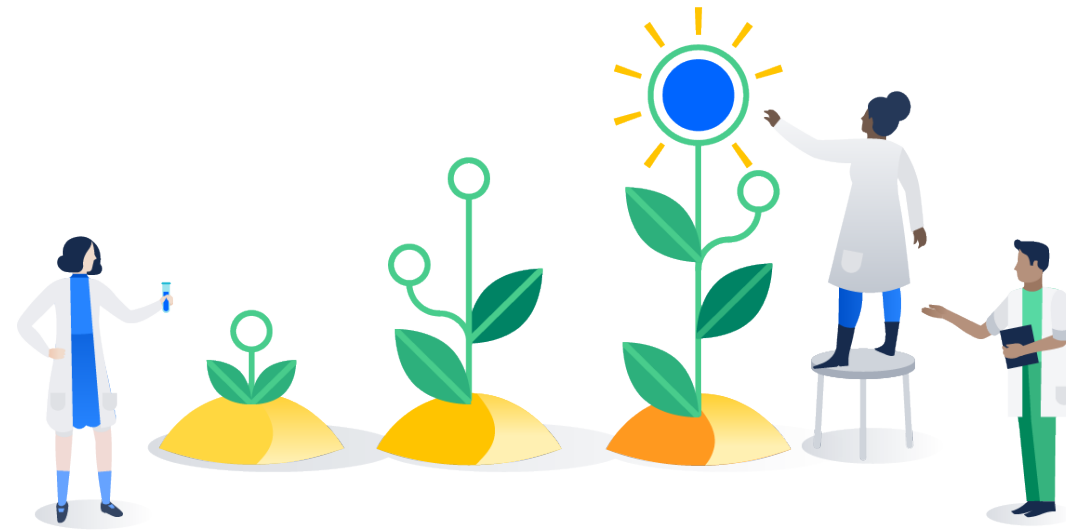
Do you want a bull in a china shop?

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Creating mess

Chaos is hard to step back from.

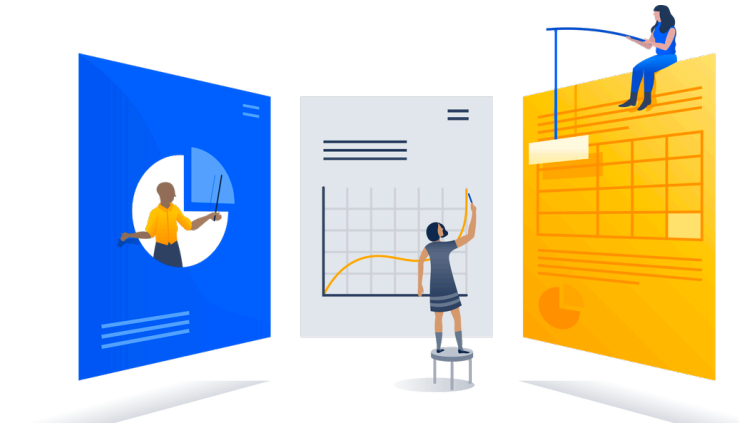
# Three ways to enable your stakeholders



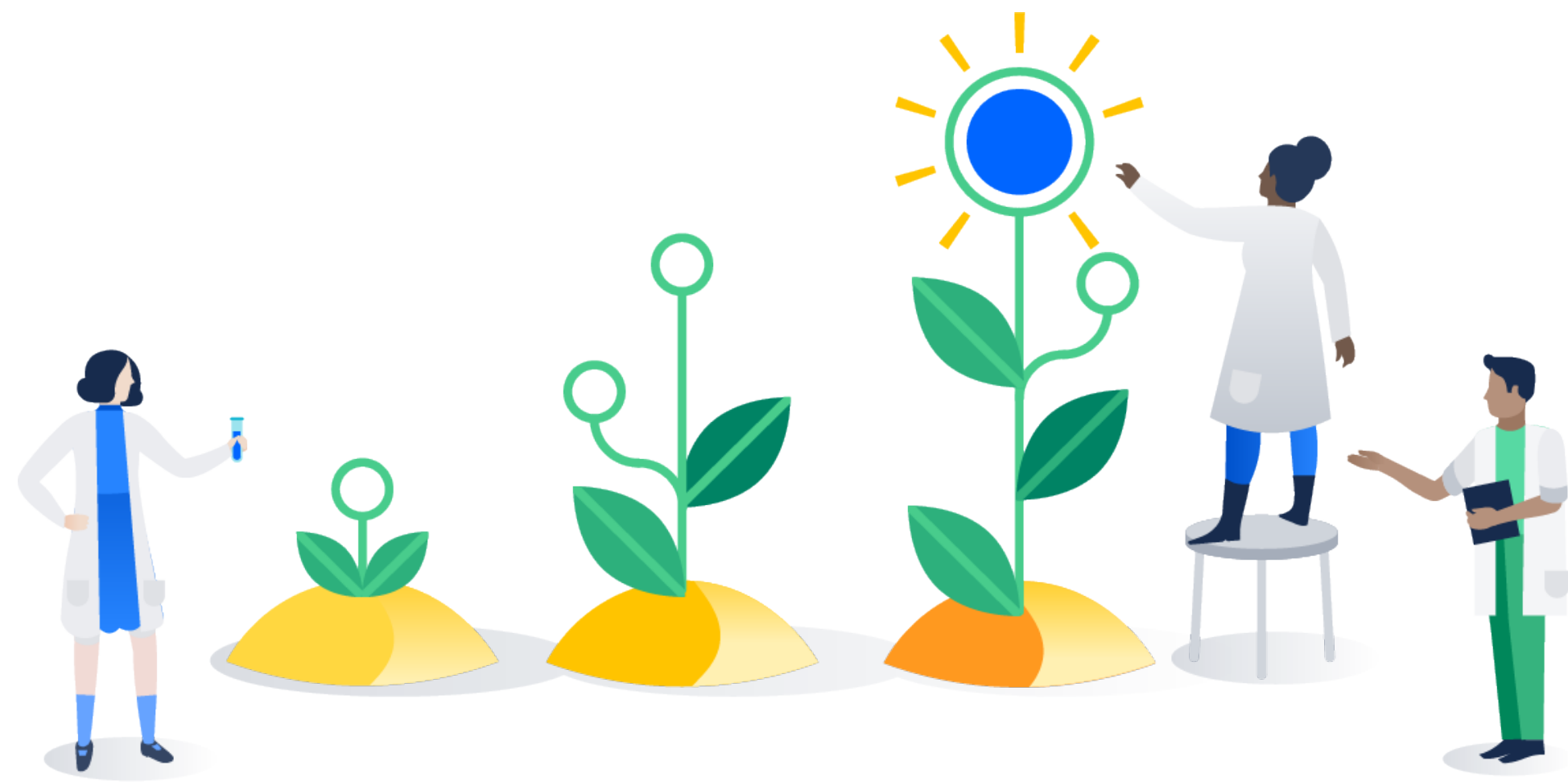
*Create a seed  
project*



*Make them Jira  
admins*



*Give them a team-  
managed project*



Creating a  
seed project

# When is this the right approach?

*When standardization is  
important*

---

*When people may not follow  
your guidelines*

---

*When people are less willing  
to learn*

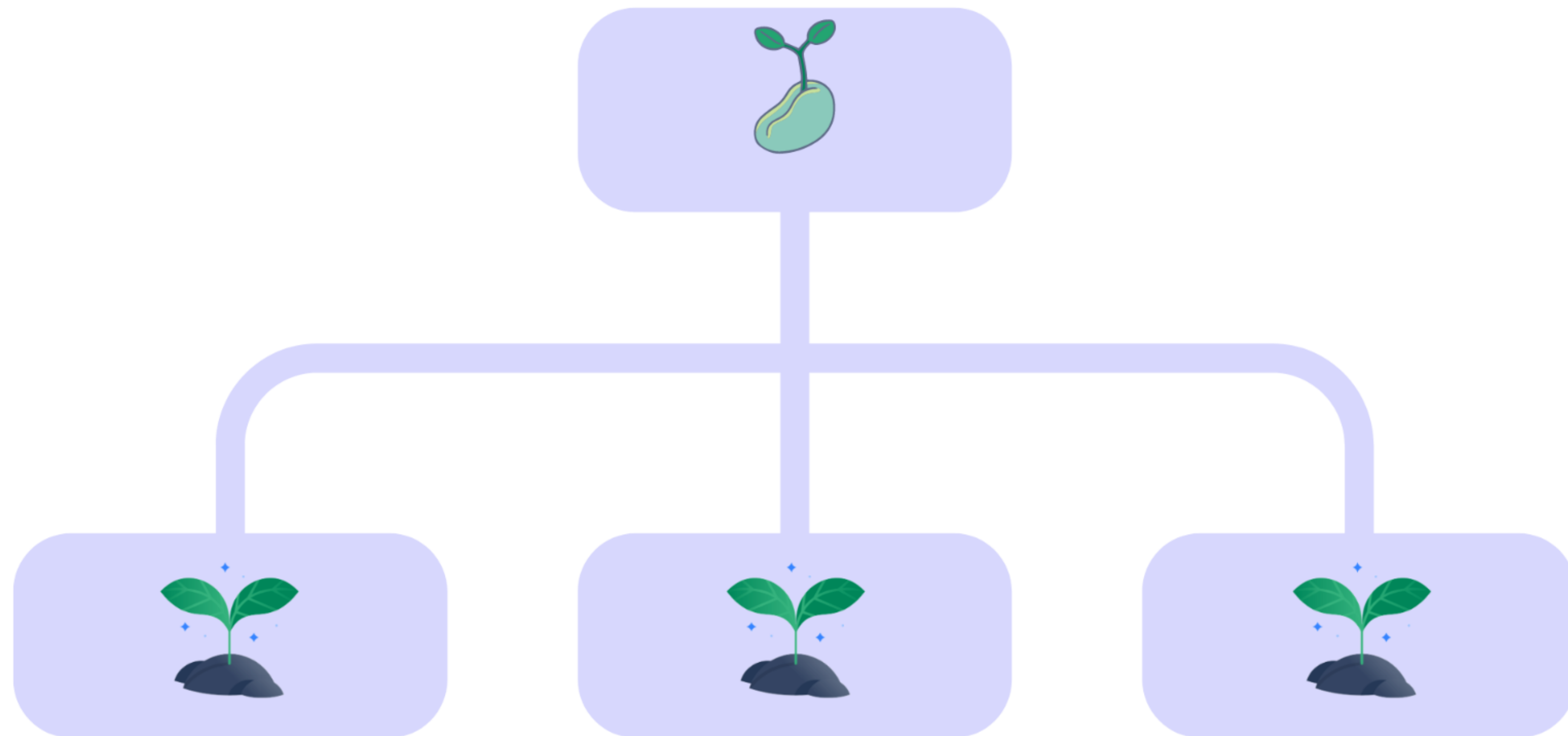
**BOTTOM LINE: YOU SHOULD USE A SEED PROJECT...**

---

When you are  
worried about  
consistency.



# Configure one project to rule them all





# PRO TIPS

## Simple config

One screen for all request types.

## Give them options

Add the fields and workflows most teams use.

## Not too many

They will need your help.

The screenshot displays the Jira interface for configuring screens. The top navigation bar includes the Jira logo, 'Your work', and various menu items like 'Projects', 'Filters', 'Dashboards', 'People', 'Plans', 'Assets', 'Apps', and a 'Create' button. The left sidebar shows the 'Marketing service d...' project settings, with a 'Back to project' link and a list of settings including 'Project settings', 'Details', 'People', 'Features', 'Summary', 'Issue types', 'Request types', 'Forms', 'External resources', 'Customer permissions', 'Language support', and 'Portal settings'. The main content area is titled 'Screens' and shows the configuration for the 'Marketing service desk (New)' project. It lists two screen schemes: 'MSDN: Jira Service Management: General Screen Scheme' (marked as DEFAULT) and 'MSDN: Jira Service Management Screen Scheme'. The first scheme lists four request types: 'Emailed request', 'Questions for marketing', 'Request a campaign', and 'Request a content review'. The second scheme lists two issue types: 'Task' and 'Sub-task'.



# PRO TIPS

## Simple config

One screen for all request types.

## Give them options

Add the fields and workflows most teams use.

## Not too many

They will need your help.

← Back to request types

View workflow

Request form

Issue view

Workflow statuses

Request a campaign

Fields added to the request form are filled out by customers when they raise a request from the portal. [Learn more about the portal](#), or [how to customize fields](#).

Request type description ⓘ

Submit your request for a marketing campaign.

Instructions

Summary

Description

Attachment

Fields ⓘ

Search all fields

a

Use fields from any project on your site

Fields unavailable in the issue view 4

Suggested fields ⓘ

Approvers

Assignee

Collaborator Approvers

Due date

Labels

ProForma all fields test

Which Reylo Ren Character are you?

Advanced fields

Compass

Major incident

Parent Link

Create new custom fields

Refresh this page after creating new fields.

Give feedback

Discard

Preview

Save changes

# PRO TIPS

## Simple config

One screen for all request types.

## Give them options

Add the fields and workflows most teams use.

## Not too many

They will need your help.

← Back to request types

🎧 View workflow

Request form

Issue view

Workflow statuses

👤 Employee onboarding

Fields added to the request form are filled out by customers when they raise a request from the portal. [Learn more about the portal](#), or [how to customize fields](#).

Request type description ⓘ

Submit an onboarding request for a new hire.

☰ Instructions

➤

Aa Summary

What is the employee name?

REQUIRED

➤

📎 Attachment

Offer letter

➤

☰ `Vidhu's Form` form

⋮

Fields ⓘ

Search all fields

Type to search all fields

Use fields from any project on your site

Suggested fields ⓘ

🕒 Actual start

Aa Affected hardware

🔦 Affected services

☰ Affects versions

👤 Approvers

👤 Assignee

ISSUE

☰ Backout plan

ISSUE

📌 Change type

Aa Checking for Simon

👤 Collaborator Approvers

☰ Components

ISSUE

Aa Department

Create new custom fields

Refresh this page after creating new fields.

🗣 Give feedback

Discard

Preview

Save changes



**WHAT IF YOU WANT TO GIVE  
THEM MORE FREEDOM?**



**Make them  
Jira admins**

# When is this the right approach?

*When autonomy trumps  
standardization*

---

*When you trust your team  
will do the right thing*

---

*When people really want to  
do it themselves*

**BOTTOM LINE: YOU SHOULD GIVE THEM  
JIRA ADMIN PERMISSIONS...**

When you trust  
them and they  
are keen to learn.

Chrome

File

Edit

View

History

Bookmarks

Profiles

Tab

Window

Help

HR Service Desk for Darth Vad

+

←

→

↺

jehangonzales.atlassian.net/jira/servicedesk/projects/HSDFDV/settings/request-types/request-type/797/request-form

🏠

☆

⚙️

🔍

👤

⋮

Centrify portal

Home - Confluence

Data Portal

Atlassian Style Gu...

ADG Presentation...

ARMOR board - A...

Welcome to SHIEL...

Issue Navigator - ...

[JSDCLOUD-8001...

STAGING

2020 08 19 - ITS...

Issue layout scala...

Bento opt-out req...

»

×

Project templates

Software development

Service management

Work management

Product management

Marketing

Human resources

Finance

Design

Personal

Operations

Legal

Sales

Analytics


IT

Facilities

PRODUCTS

Jira Software


Jira Service Management



IT service management

Handle service requests, resolve incidents, approve changes and fix problems using ITSM best practices.


See details



General service management for IT teams

Manage your everyday IT service requests in one location and help your employees get the answers they need.


See details



General service management for business teams

Manage your incoming requests and collect the information needed to respond to them at scale.


See details



Customer service management

Deliver great service experiences fast with a template designed to help your external customers.

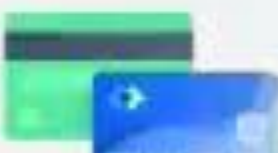
See details



HR service management

Manage onboarding and offboarding, answer questions, and facilitate change requests for your staff.


See details



Finance service management

Manage budget and spend requests, respond to questions, and share guidelines and insights.


See details



Facilities service management

Easily manage requests for maintenance, moving, and event planning.

See details



Marketing service management

Manage your marketing requests and help your marketing team get the answers they need.

See details



# PRO TIPS

## Use a project template

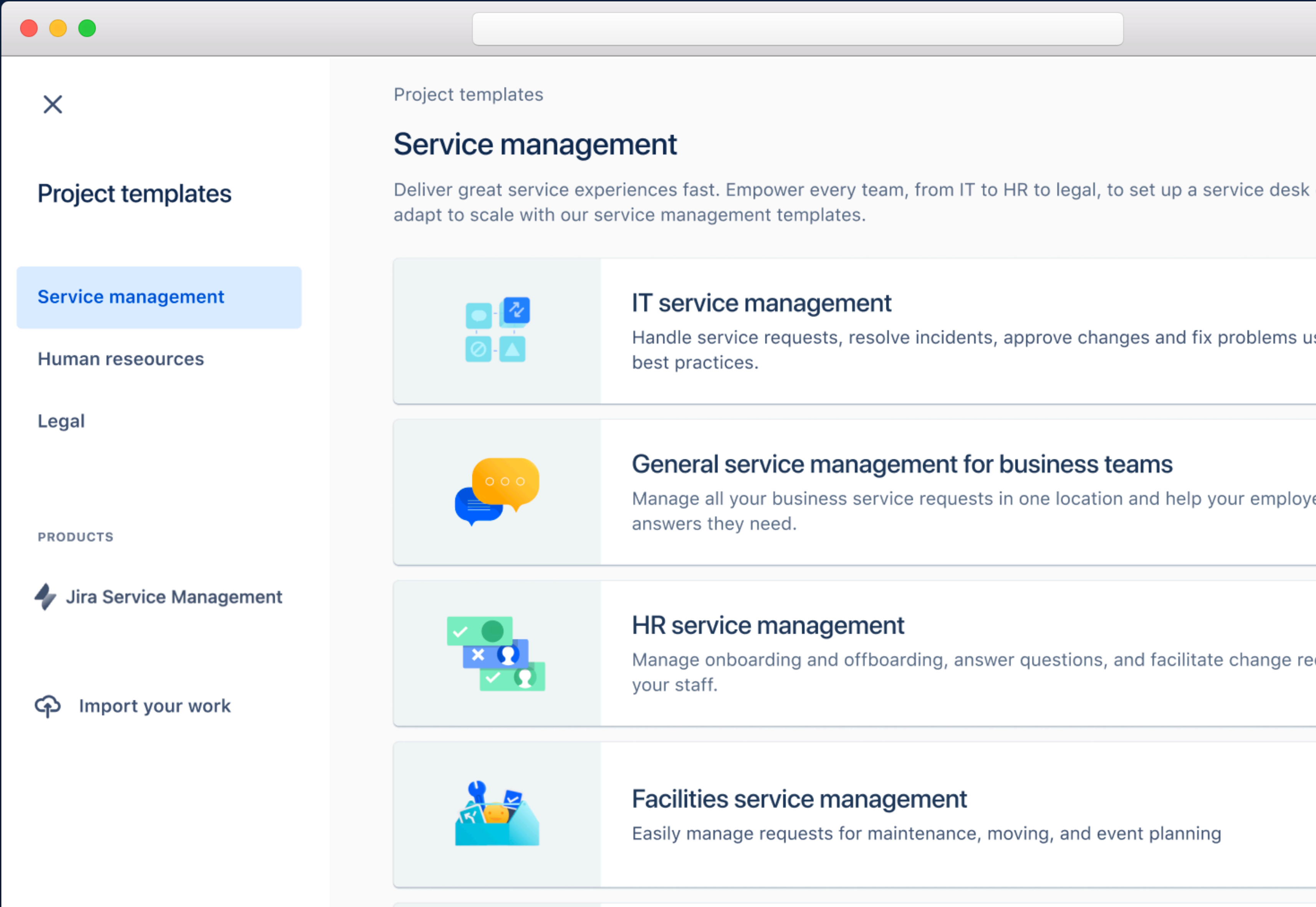
Ensure no configuration is shared

## Hold a training session

Teach them how to get started

## Set guidelines

Be clear on what they can and can't do



# PRO TIPS

## Use a project template

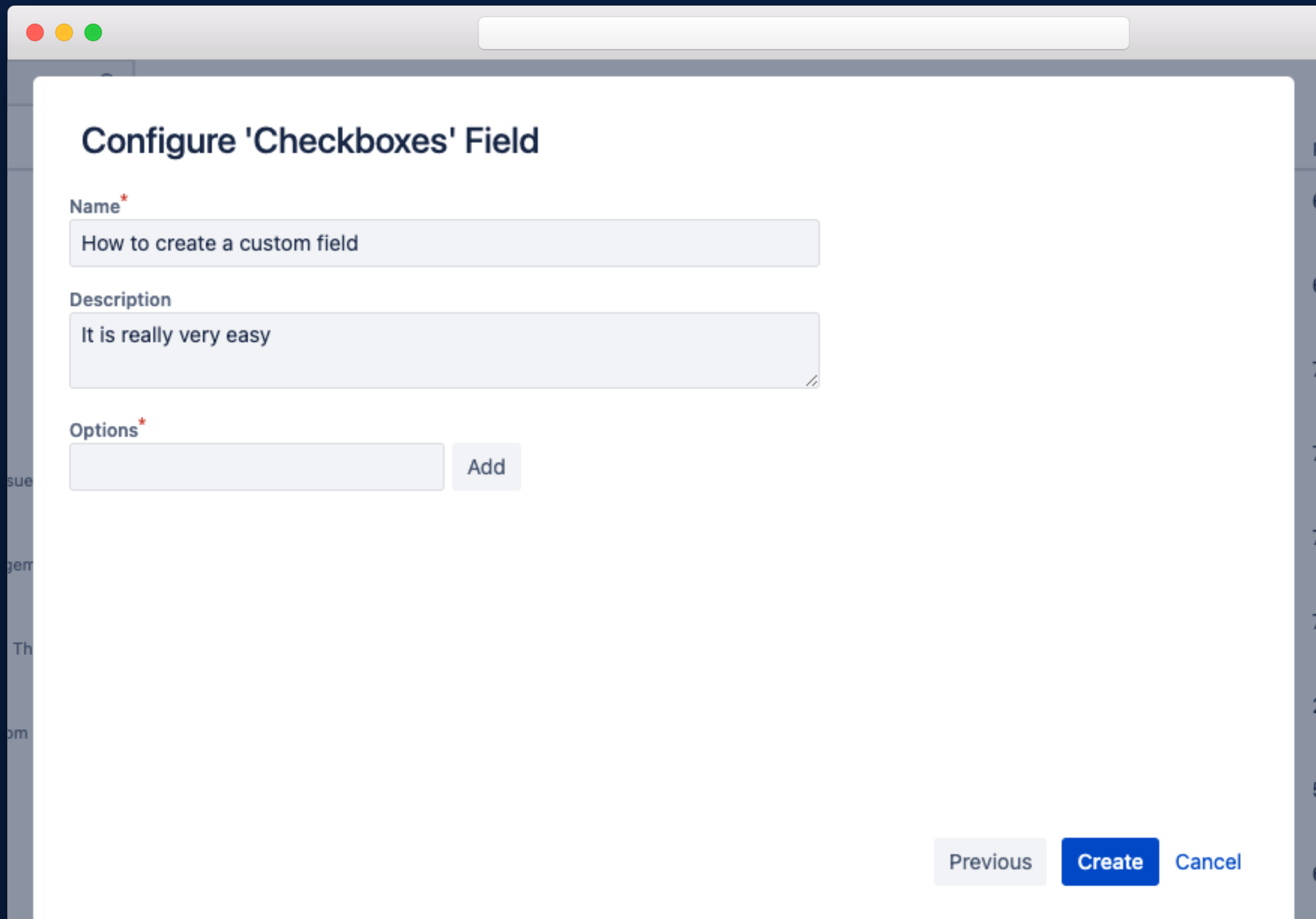
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Be clear on what they can and can't do



The image shows a macOS-style window with a title bar containing three colored window control buttons (red, yellow, green) and a search bar. The main content area is a white dialog box titled "Configure 'Checkboxes' Field". Inside the dialog, there are three sections: "Name\*" with a text input field containing "How to create a custom field"; "Description" with a text area containing "It is really very easy"; and "Options\*" with a text input field and an "Add" button. At the bottom right of the dialog, there are three buttons: "Previous", "Create" (highlighted in blue), and "Cancel".

Configure 'Checkboxes' Field

Name\*

How to create a custom field

Description

It is really very easy

Options\*

Add

Previous Create Cancel

# PRO TIPS

## Use a project template

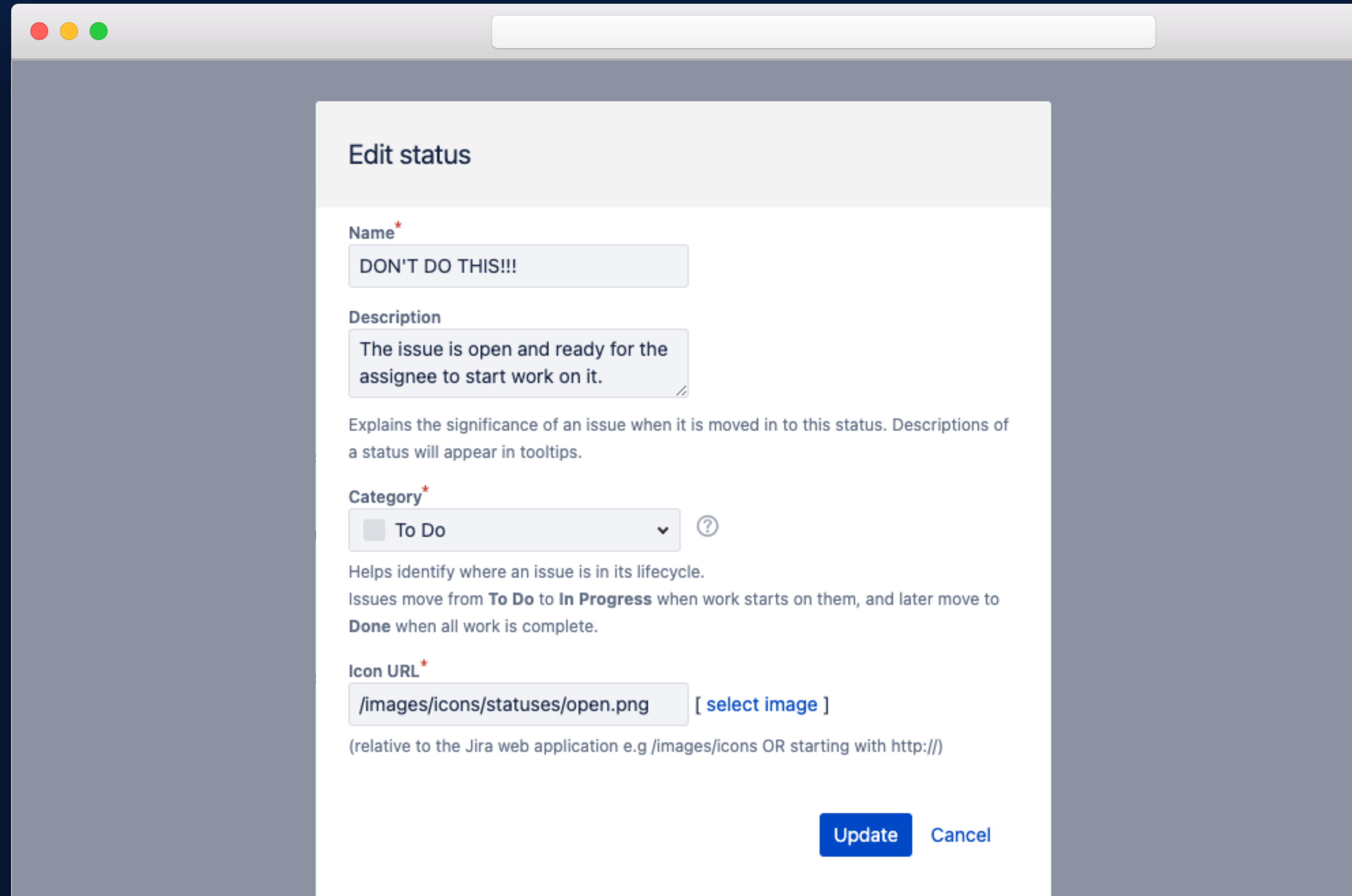
Ensure no configuration is shared

## Hold a training session

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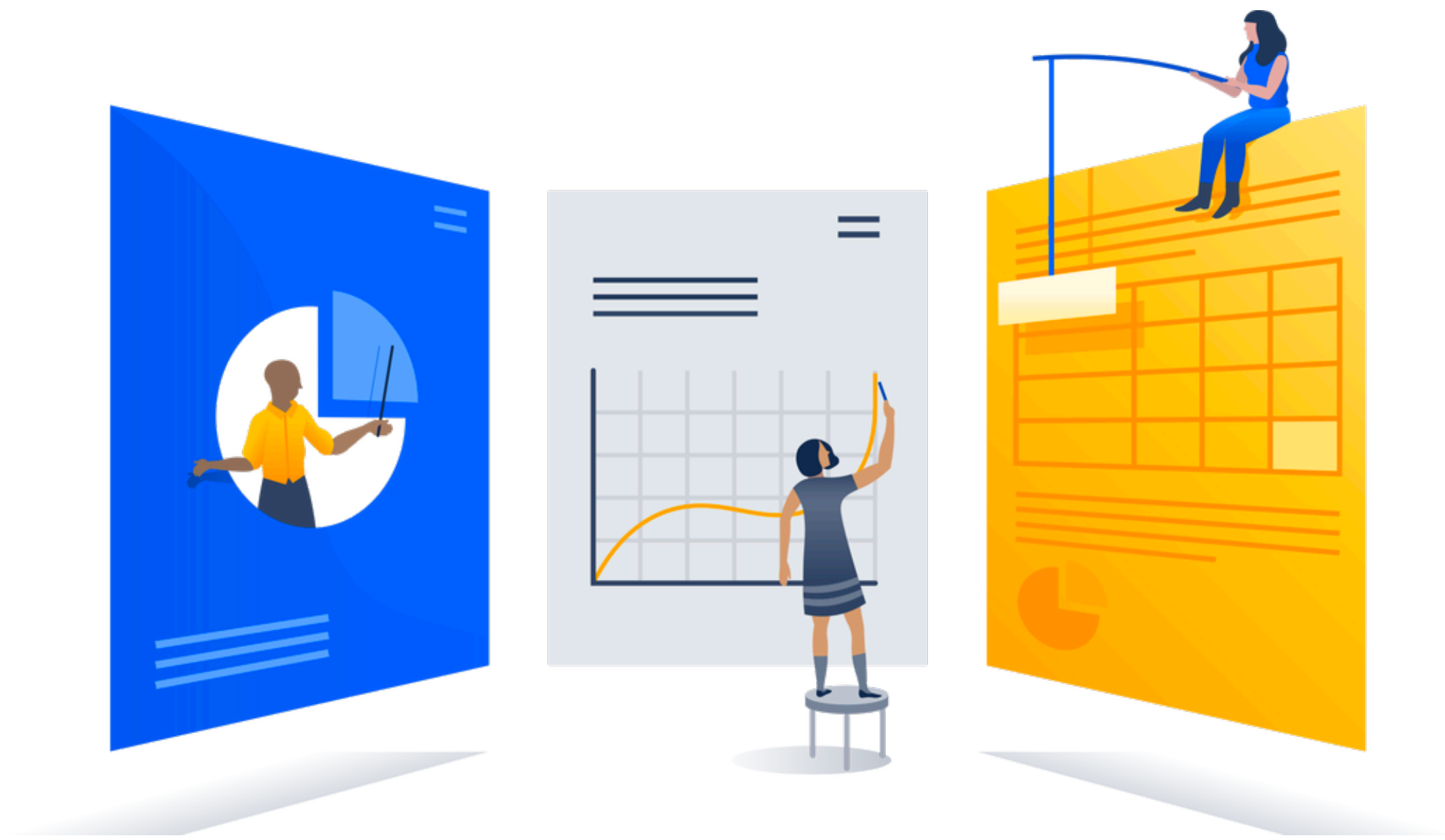
Be clear on what they can and can't do



The screenshot shows a 'Edit status' dialog box with the following fields and content:

- Name\***: A text input field containing 'DON'T DO THIS!!!'.
- Description**: A text area containing 'The issue is open and ready for the assignee to start work on it.' Below the text area is a help text: 'Explains the significance of an issue when it is moved in to this status. Descriptions of a status will appear in tooltips.'
- Category\***: A dropdown menu with 'To Do' selected. A help icon (?) is to the right. Below the dropdown is a help text: 'Helps identify where an issue is in its lifecycle. Issues move from **To Do** to **In Progress** when work starts on them, and later move to **Done** when all work is complete.'
- Icon URL\***: A text input field containing '/images/icons/statuses/open.png'. To the right is a link '[ select image ]'. Below the field is a note: '(relative to the Jira web application e.g /images/icons OR starting with http://)'. At the bottom right are 'Update' and 'Cancel' buttons.

**WHAT IF YOU WANT TO GIVE  
THEM MORE FREEDOM?**



Give them a  
team-  
managed  
project



# When is this the right approach?

*When you don't want other  
projects impacted*

---

*When they really want to run  
their own service desks*

---

*When the team is less  
technical*

**BOTTOM LINE: YOU SHOULD CREATE A  
TEAM-MANAGED SERVICE DESK...**

When ease of use  
and autonomy  
matter most.

## Project templates

Software development

## Service management

### Work management

Product management

Marketing

Human resources

## Finance

## Design

Personal

## Operations

Legal


Sales

## Analytics

IT

## Facilities

## PRODUCTS

 Jira Software

 Jira Service Management



## General service management for IT teams

- ✦ Jira Service Management

Manage your everyday IT service requests in one location and help your employees get the answers they need.

[See details](#)

General service management for business teams **LAST CREATED**

- Jira Service Management

Manage your incoming requests and collect the information needed to respond to them at scale.

[See details](#)

## Customer service management

✦ Jira Service Management

Deliver great service experiences fast with a template designed to help your external customers.

[See details](#)

## HR service management

• Jira Service Management

Manage onboarding and offboarding, answer questions, and facilitate change requests for your staff.

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### Finance service management

- Jira Service Management

Manage budget and spend requests, respond to questions, and share guidelines and insights.

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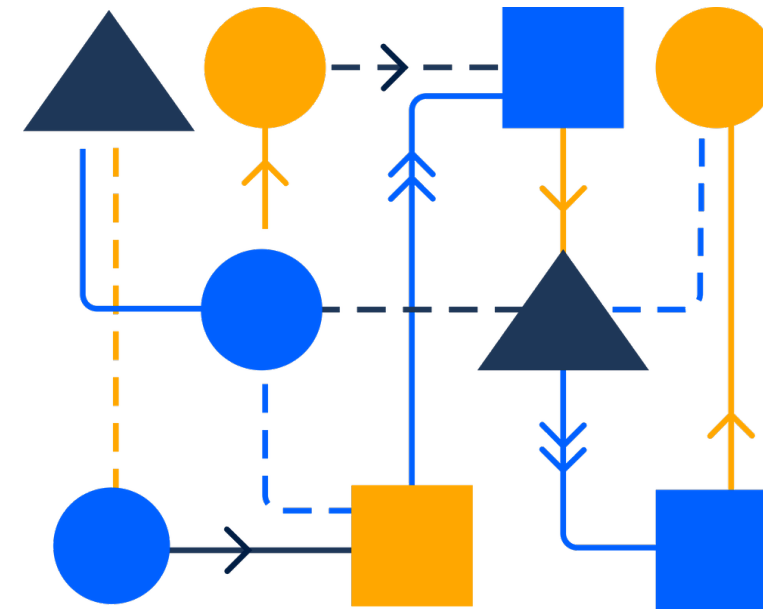
## Facilities service management

• **Item Control Management**

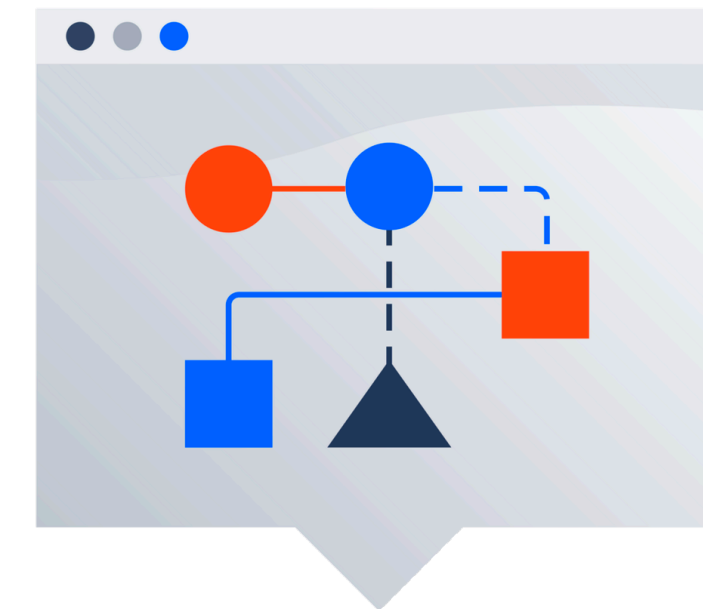
# New team-managed project features



CMP/asset fields



Customer  
transitions



Copy workflow  
within project



# PRO TIPS

**Walk them through it first**  
Get them across the basics

**Encourage independence**  
Let them create their service desk on their own

**Check in before go-live**  
Make sure the release is a success

Projects / Finance TMP / Project settings / Request types

?

Creating your first request type

Edit workflow

...

Portal description

Got a question for the finance team? Submit it here.

Portal instructions

Enter text to help your customers complete this form correctly.

Customer request form

Aa

Summary

What is your finance question?

REQUIRED

Description

REQUIRED

Attachment

123

Creating your first custom field

This is what customers see

Portal field name

This is what customers see

Description

Describe it! Use your words :) |

Default number

Enter a default value

# PRO TIPS

## Walk them through it first

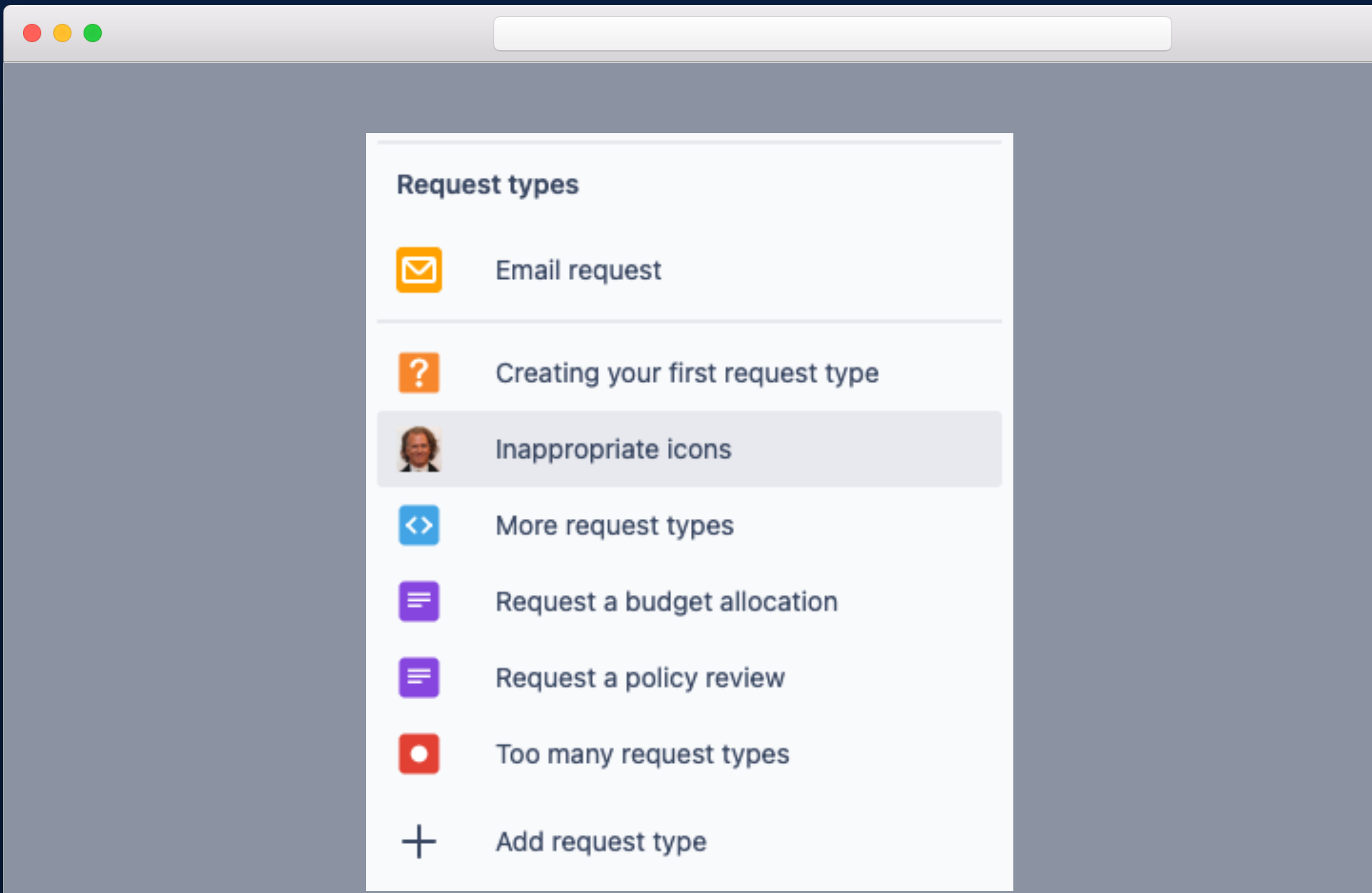
Get them across the basics

## Encourage independence

Let them create their service desk on their own

## Check in before go-live

Make sure the release is a success





# PRO TIPS

## Walk them through it first

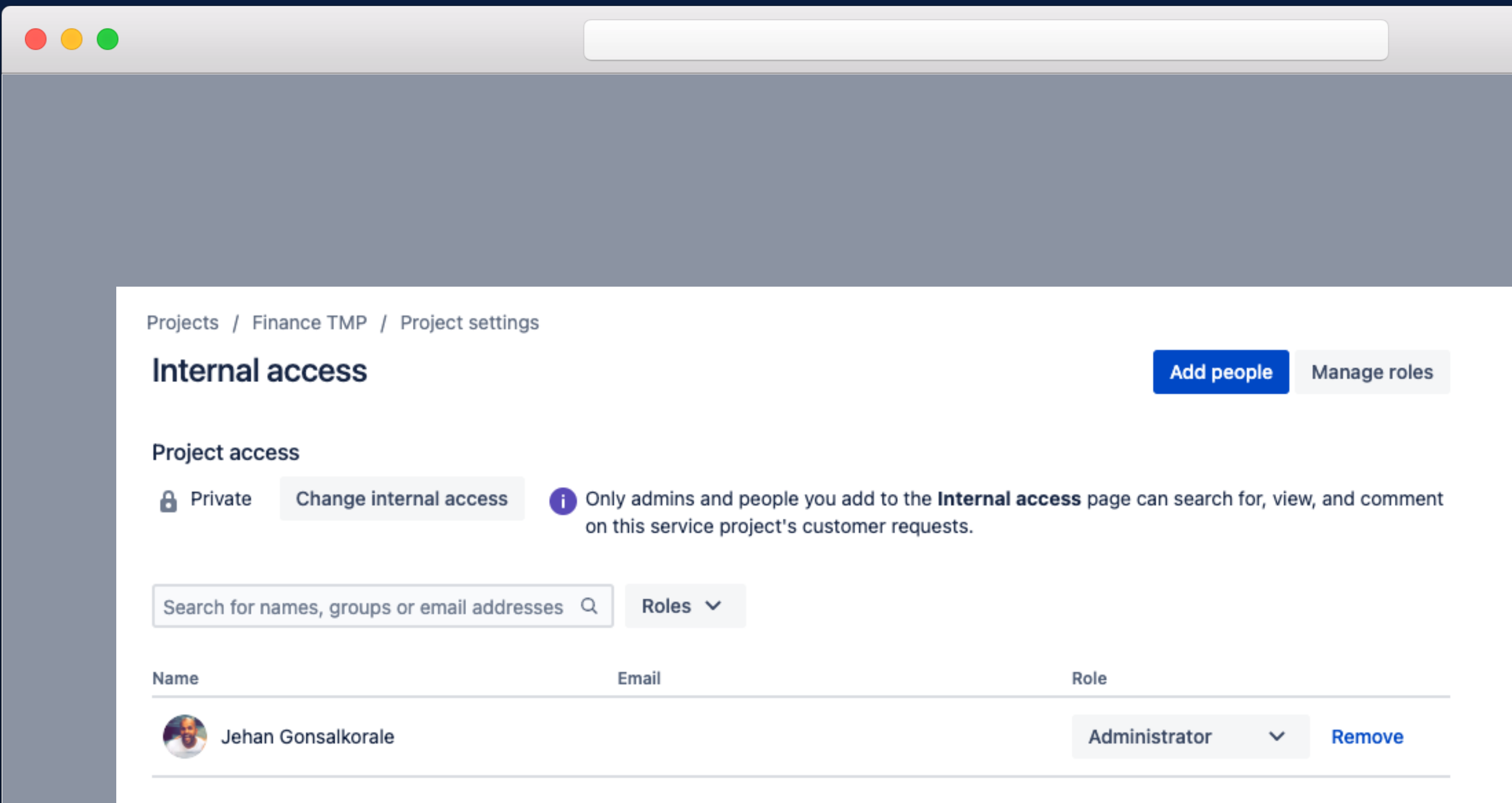
Get them across the basics

## Encourage independence

Let them create their service desk on their own

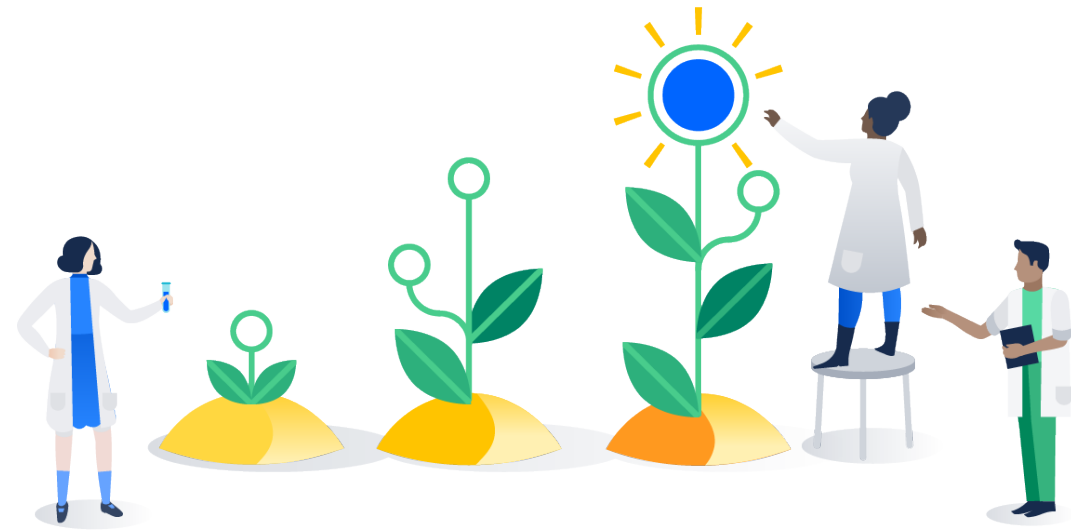
## Check in before go-live

Make sure the release is a success



Let's recap

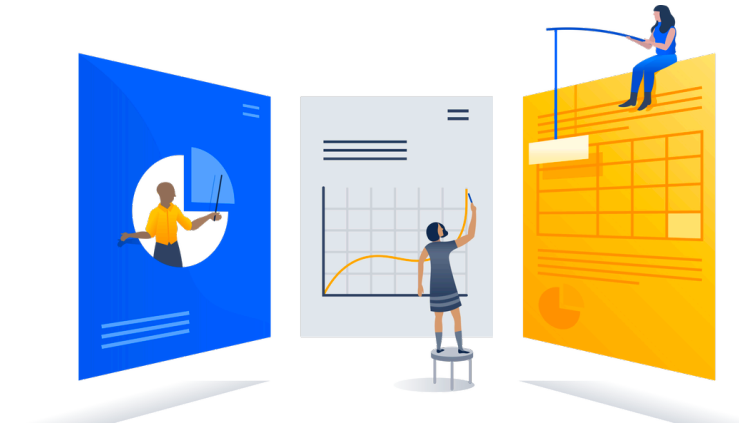
# Three ways to enable your stakeholders



*Create a seed  
project*



*Make them Jira  
admins*



*Give them a team-  
managed project*

# Stakeholders? No, these are admins.

*IT admins*

*Marketing*

*IT support*

*Analytics*

*Finance*



# Thank you



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