



The content described herein is intended to outline our general product direction for informational purposes only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

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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.

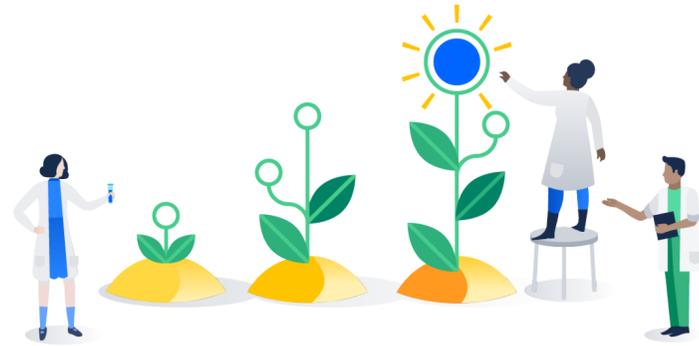
Breaking things

Do you want a bull in a china shop?

Creating mess

Chaos is hard to step back from.

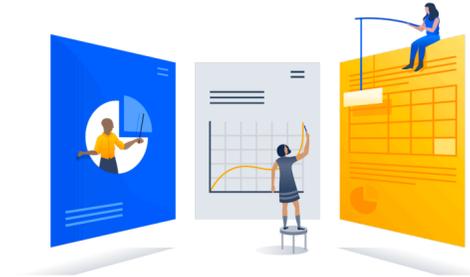
Three ways to enable your stakeholders



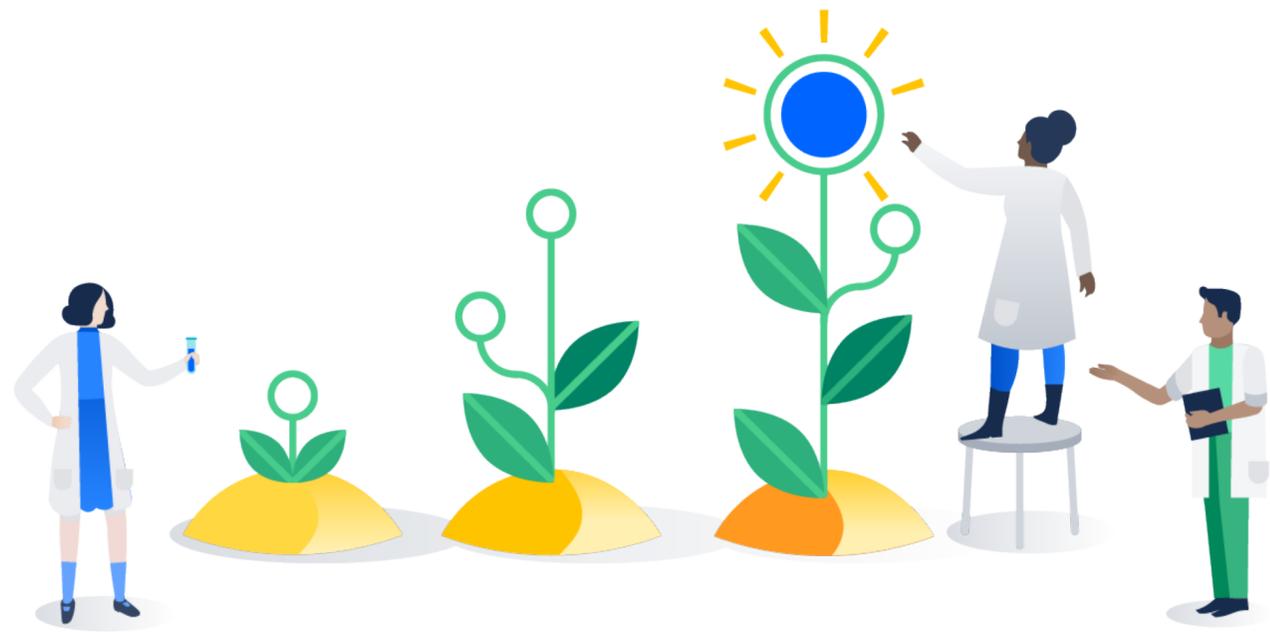
Create a seed project



Make them Jira admins



Give them a team-managed project



Creating a seed project

When is this the right approach?

*When standardization is
important*

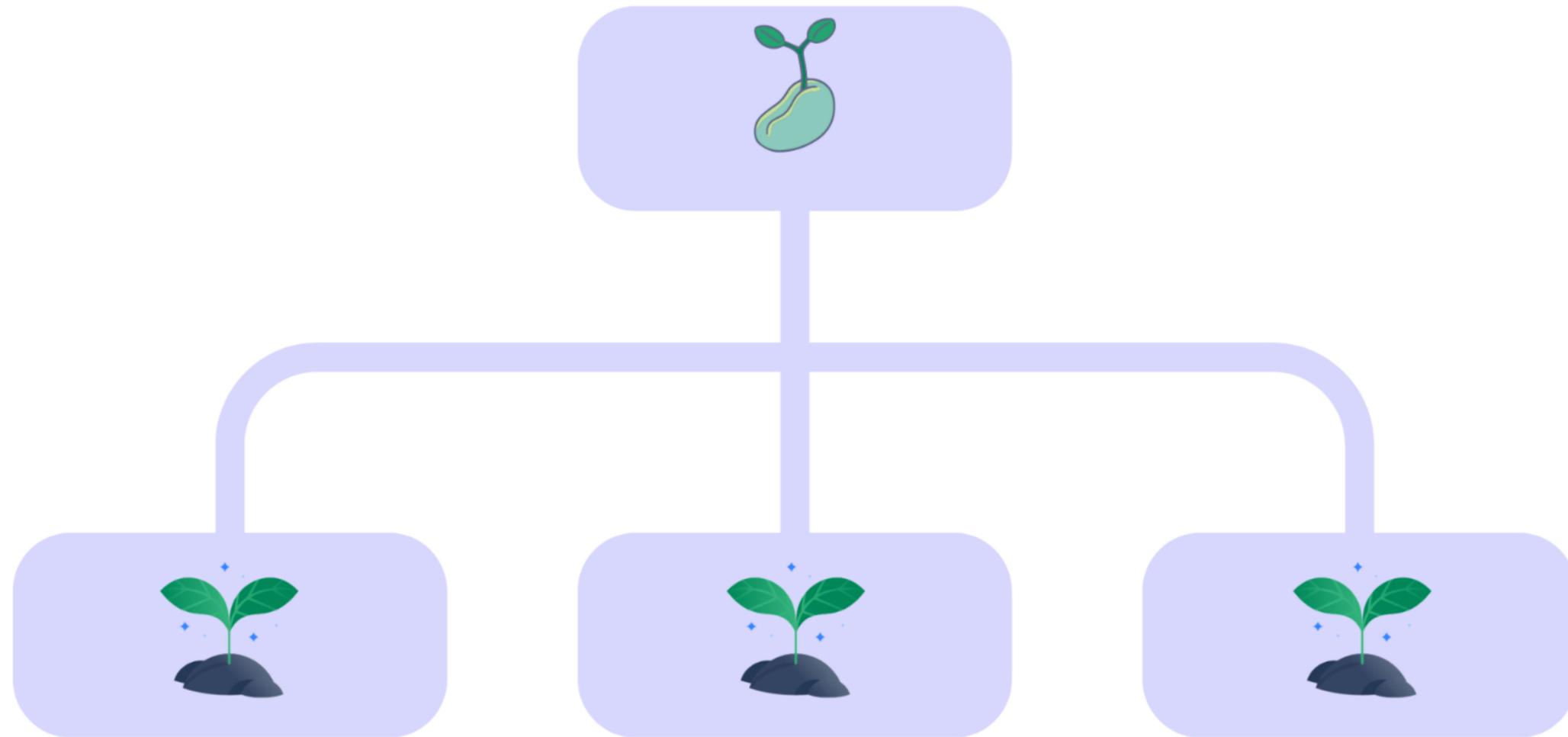
*When people may not follow
your guidelines*

*When people are less willing
to learn*

BOTTOM LINE: YOU SHOULD USE A SEED PROJECT..

When you are
worried about
consistency.

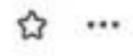
Configure one project to rule them all



- Customer Next Gen Service project
- Queues
- Raise a request
- Sheets
- KNOWLEDGE
- Knowledge base
- Reports
- CHANNELS & PEOPLE
- Channels
- Invite team
- Customers
- SHORTCUTS
- Add shortcut

Projects / Customer Next Gen / Queues

All open



Your queue is empty but what is empty?

Time to ponder the mysteries of the Universe.

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 shows the Jira interface for configuring project settings. The breadcrumb trail is: Projects / Marketing service desk (New) / Project settings. The main heading is 'Screens'. Below it, the title is 'MSDN: Jira Service Management Issue Type Screen Scheme'. The text explains that screens allow you to arrange fields for an issue and that the screen scheme defines which screens apply to the project. It states that this project uses 2 screen configurations. The first configuration is 'MSDN: Jira Service Management: General Screen Scheme' (marked as DEFAULT) and includes the following request types: 'Emailed request', 'Questions for marketing', 'Request a campaign', and 'Request a content review'. The second configuration is 'MSDN: Jira Service Management Screen Scheme' and includes '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.

The screenshot shows a Jira configuration page for a request type named "Request a campaign". The page is divided into several sections:

- Navigation:** "Back to request types" (left), "View workflow" (right).
- Tabs:** "Request form" (active), "Issue view", "Workflow statuses".
- Title:** "Request a campaign".
- Description:** "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." Below this is a "Request type description" field containing the text "Submit your request for a marketing campaign."
- Field Selection Panel:** A dashed box contains four field types: "Instructions", "Summary" (marked "REQUIRED"), "Description" (marked "REQUIRED"), and "Attachment".
- Fields Panel (Right):** A search bar with "a" is at the top. Below it are sections for "Fields unavailable in the issue view" (4 items), "Suggested fields" (including "Approvers", "Assignee", "Collaborator Approvers", "Due date", "Labels", "ProForma all fields test", "Which Reylo Ren Character are you?"), and "Advanced fields" (including "Compass", "Major incident", "Parent Link").
- Footer:** "Give feedback" (left), "Discard", "Preview", "Save changes" (right).

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 shows a web-based configuration interface for a request type named "Employee onboarding". At the top, there are navigation links: "Back to request types" and "View workflow". Below this, there are tabs for "Request form", "Issue view", and "Workflow statuses", with "Request form" selected. The main heading is "Employee onboarding" with a person icon. A descriptive text box contains: "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." Below this is a "Request type description" field with the text: "Submit an onboarding request for a new hire." The central area is a dashed box containing a list of form sections: "Instructions", "Summary" (with the text "What is the employee name?" and a "REQUIRED" tag), and "Attachment" (with the text "Offer letter"). At the bottom of this dashed box is a preview of the form titled "'Vidhu's Form' form". On the right side, there is a "Fields" panel with a search bar and a list of suggested fields: "Actual start", "Affected hardware", "Affected services", "Affects versions", "Approvers", "Assignee" (marked "ISSUE"), "Backout plan" (marked "ISSUE"), "Change type", "Checking for Simon", "Collaborator Approvers", "Components" (marked "ISSUE"), and "Department". At the bottom of the fields panel is a link "Create new custom fields" and a note "Refresh this page after creating new fields." At the very bottom of the interface are buttons for "Give feedback", "Discard", "Preview", and "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.

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** LAST CREATED
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](#)

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

The screenshot shows a web browser window displaying the 'Project templates' page in Jira Service Management. The page has a light blue header with a close button (X) and a search bar. Below the header, there's a sidebar with navigation options: 'Project templates', 'Service management' (highlighted in blue), 'Human resources', and 'Legal'. Under 'PROJECTS', there are links for 'Jira Service Management' and 'Import your work'. The main content area is titled 'Service management' and includes a sub-header 'Project templates'. Below this, there's a descriptive paragraph: 'Deliver great service experiences fast. Empower every team, from IT to HR to legal, to set up a service desk that can adapt to scale with our service management templates.' The main content is organized into four rows, each representing a different service management template. Each row features an icon, a title, and a brief description. The first row is 'IT service management' with an icon of a computer monitor and a gear, describing handling service requests and resolving incidents. The second row is 'General service management for business teams' with an icon of two speech bubbles, describing managing business service requests. The third row is 'HR service management' with an icon of a person and a checkmark, describing managing onboarding and offboarding. The fourth row is 'Facilities service management' with an icon of a person and a checklist, describing managing requests for maintenance, moving, and event planning.

Project templates

Service management

Deliver great service experiences fast. Empower every team, from IT to HR to legal, to set up a service desk that can adapt to scale with our service management templates.

- IT service management**
Handle service requests, resolve incidents, approve changes and fix problems using best practices.
- General service management for business teams**
Manage all your business service requests in one location and help your employees get the answers they need.
- HR service management**
Manage onboarding and offboarding, answer questions, and facilitate change requests for your staff.
- Facilities service management**
Easily manage requests for maintenance, moving, and event planning

PRO TIPS

Use a project template

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Teach them how to get started

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Be clear on what they can and can't do

The image shows a screenshot of a software application window with a title bar containing three colored window control buttons (red, yellow, green) and a search bar. The main content is a dialog box titled "Configure 'Checkboxes' Field". The dialog box has three main sections: "Name*", "Description", and "Options*". The "Name*" section has a text input field containing "How to create a custom field". The "Description" section has a text area containing "It is really very easy". The "Options*" section has a text input field and an "Add" button. At the bottom right of the dialog box, there are three buttons: "Previous", "Create", 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

Teach them how to get started

Set guidelines

Be clear on what they can and can't do

Edit status

Name*
DON'T DO THIS!!!

Description
The issue is open and ready for the assignee to start work on it.

Explains the significance of an issue when it is moved in to this status. Descriptions of a status will appear in tooltips.

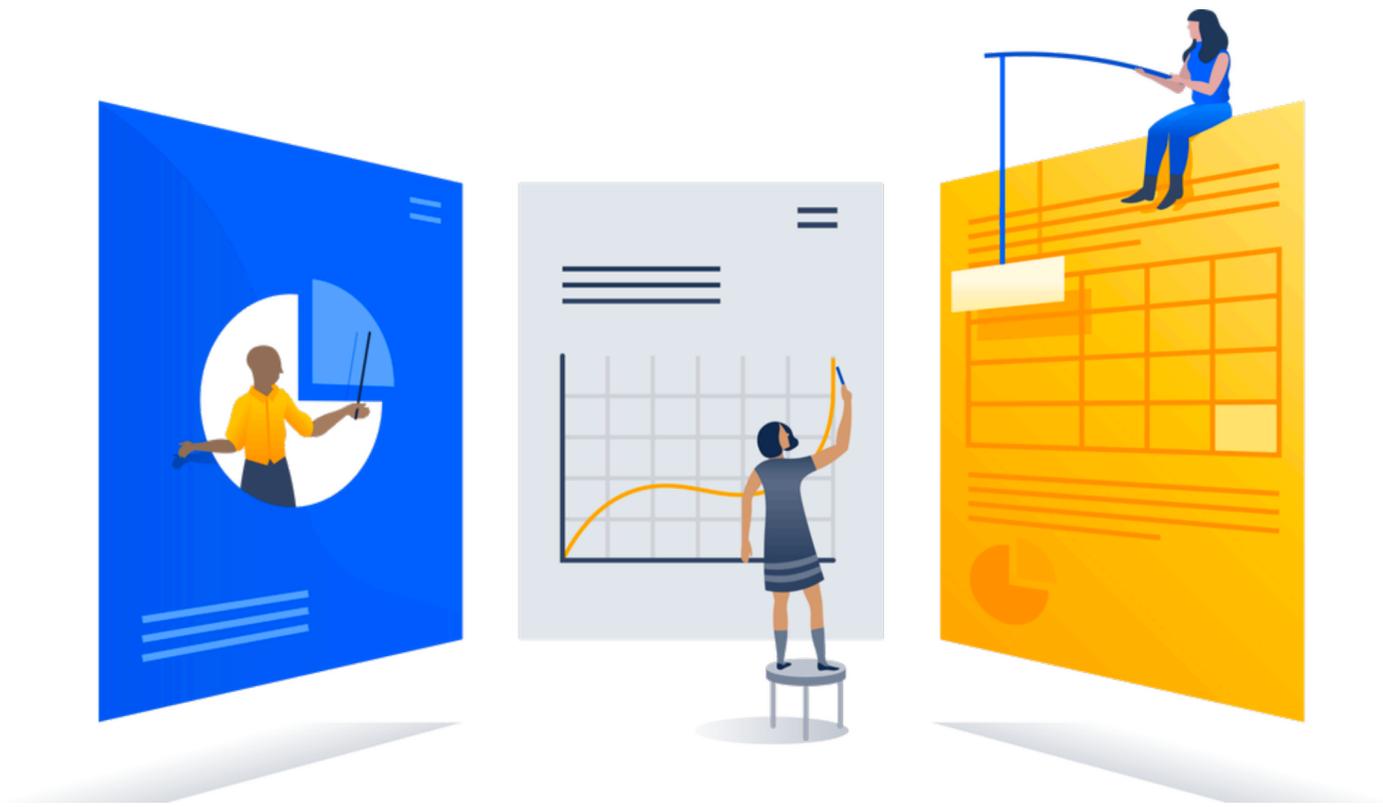
Category*
To Do [?]

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*
/images/icons/statuses/open.png [select image]
(relative to the Jira web application e.g /images/icons OR starting with http://)

Update **Cancel**

**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.

[See details](#)



Finance service management

Jira Service Management

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

[See details](#)



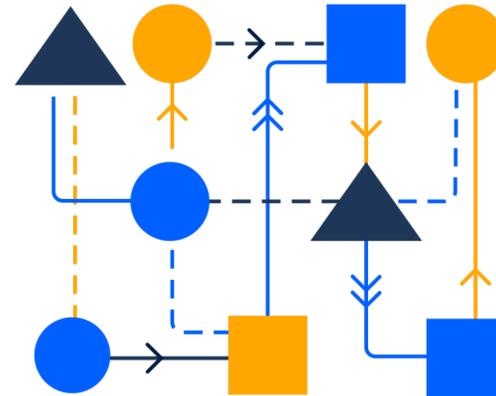
Facilities service management

Jira Service Management

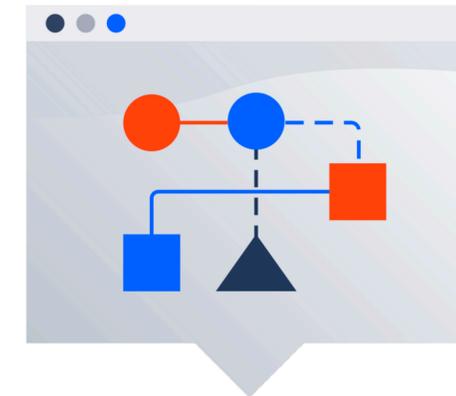
New team-managed project features



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

The screenshot shows a web application window with a title bar and a breadcrumb trail: "Projects / Finance TMP / Project settings / Request types". The main heading is "Creating your first request type" with a question mark icon. In the top right corner, there is a button labeled "Edit workflow" with a three-dot menu icon.

Under the heading, there are two sections:

- Portal description:** "Got a question for the finance team? Submit it here."
- Portal instructions:** "Enter text to help your customers complete this form correctly."

Below these is a section titled "Customer request form" with an information icon. It contains three rows of form fields:

- Summary:** A text input field with the placeholder "What is your finance question?". To the right of the field is a "REQUIRED" label and a right-pointing chevron.
- Description:** A text input field with a "REQUIRED" label and a right-pointing chevron to its right.
- Attachment:** A text input field with a right-pointing chevron to its right.

Below the form fields is a section titled "Creating your first custom field" with a "123" icon on the left and "This is what customers see" with a dropdown arrow on the right. This section contains three input fields:

- Portal field name:** A text input field with the placeholder "This is what customers see".
- Description:** A text input field with the placeholder "Describe it! Use your words :) |".
- Default number:** A text input field with the placeholder "Enter a default value".

PRO TIPS

Walk them through it first

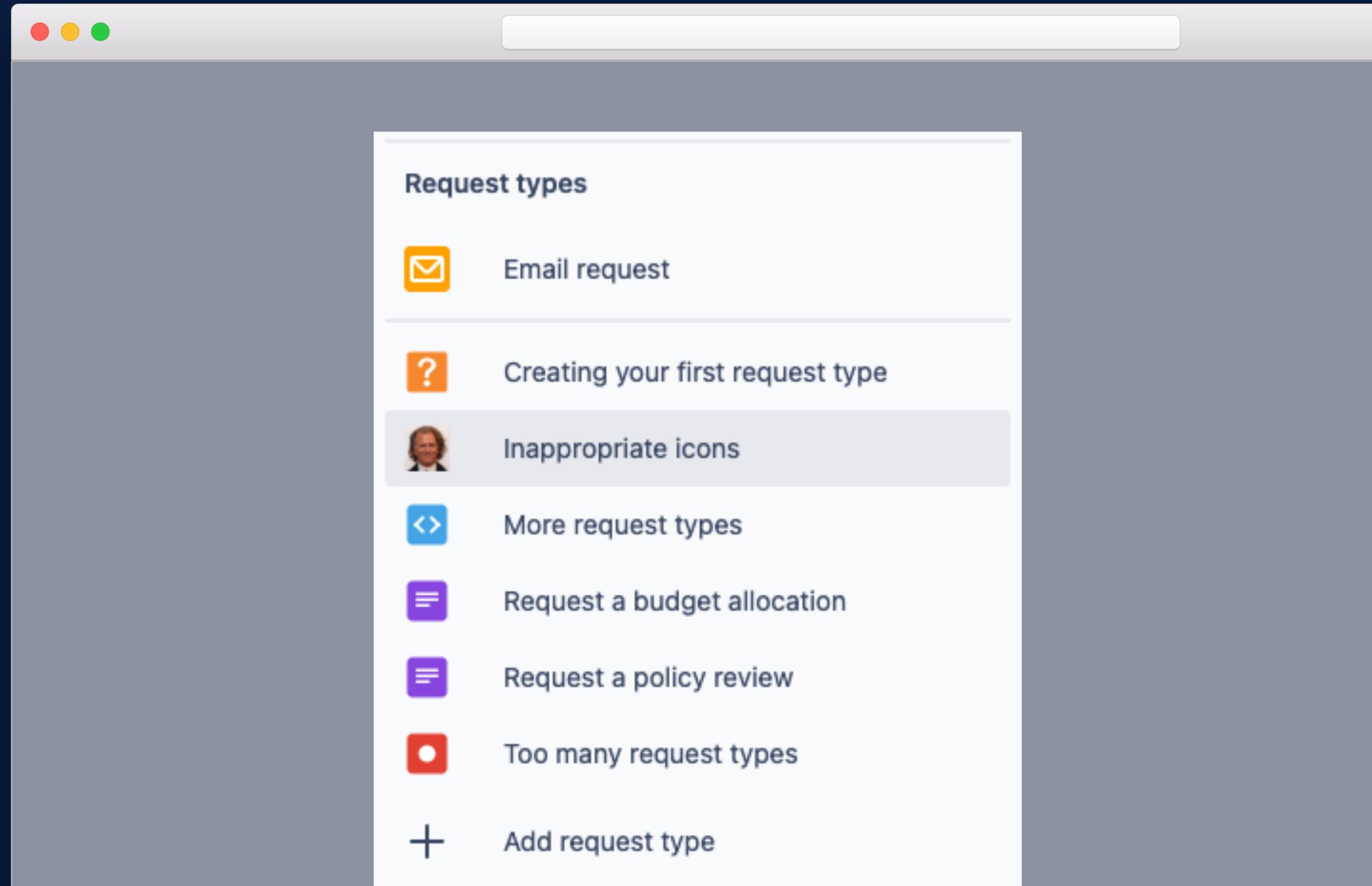
Get them across the basics

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

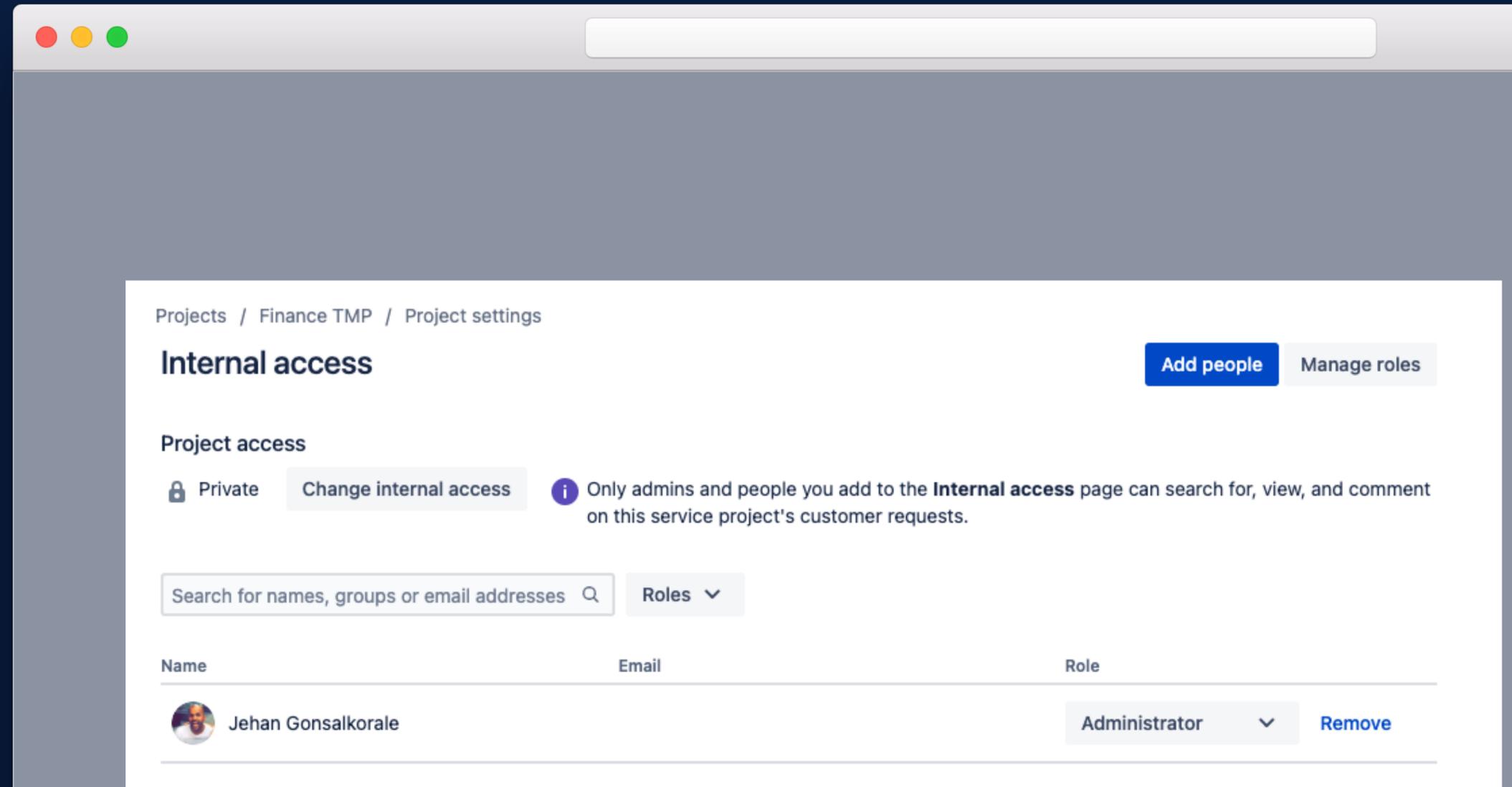
Get them across the basics

Encourage independence

Let them create their service desk on their own

Check in before go-live

Make sure the release is a success



The screenshot shows a web application interface for managing project settings. The breadcrumb trail is "Projects / Finance TMP / Project settings". The main heading is "Internal access", with two buttons: "Add people" (blue) and "Manage roles" (grey). Below this is the "Project access" section, which includes a "Private" status indicator, a "Change internal access" button, and an information icon with the text: "Only admins and people you add to the **Internal access** page can search for, view, and comment on this service project's customer requests." There is a search input field with the placeholder "Search for names, groups or email addresses" and a "Roles" dropdown menu. Below the search field is a table with columns for "Name", "Email", and "Role". The table contains one entry for "Jehan Gonsalkorale" with a role of "Administrator" and a "Remove" button.

Projects / Finance TMP / Project settings

Internal access

[Add people](#) [Manage roles](#)

Project access

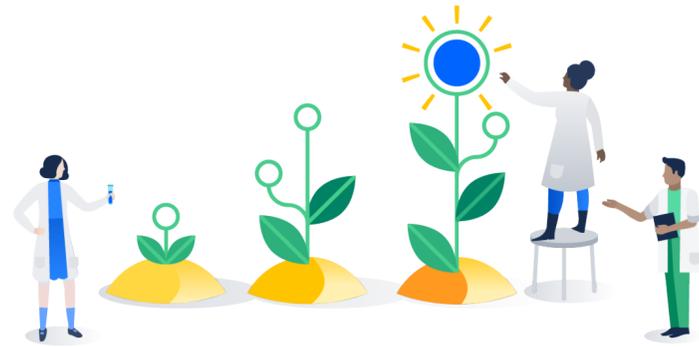
Private [Change internal access](#) i Only admins and people you add to the **Internal access** page can search for, view, and comment on this service project's customer requests.

[Roles](#) ▼

Name	Email	Role
 Jehan Gonsalkorale		Administrator ▼ Remove

Let's recap

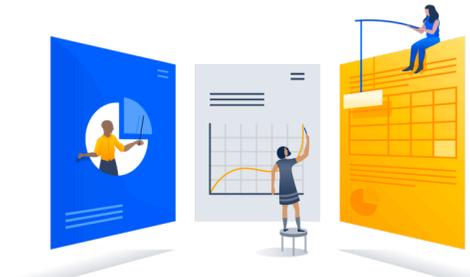
Three ways to enable your stakeholders



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



JEHAN GONSALKORALE | SENIOR PRODUCT MANAGER | @JEHAN_GONSAL