



Forms Done Right

BUILD DYNAMIC FORMS AND CHECKLISTS

Conditional forms

Allow teams to easily build dynamic forms and checklist within Jira.
Multiple questions types and validation options improve data collection.

Fewer Custom Fields

Fields in a ProForma form do not require Custom Fields. Improve performance and simplify Jira admin by using fewer custom fields

Project Level Admin

Project admins can create, edit and maintain their forms, and can also set up most form automation rules without the assistance of a Jira admin.

The screenshot displays the 'Form: New Hire Onboard Request' builder interface. The top navigation bar includes 'Settings', 'Builder' (active), 'Preview', and 'Issue JSON'. A left sidebar contains icons for a lightning bolt, star, magnifying glass, and plus sign. The main workspace shows a form titled 'New Employee Information' with four fields: 'Name' (text input), 'Supervisor' (dropdown menu with 'Select...' option), 'Job title' (text input), and 'Start date' (calendar icon with example 'e.g. 01/01/2019'). Below this is the 'Office Setup' section with 'Work location' (text input) and 'New workstation needed?' (radio buttons for 'Yes' and 'No'). A right sidebar provides configuration options for the selected 'Name' field, including 'TYPE' (Short text), 'LABEL' (Name), 'DESCRIPTION' (No description), 'DEFAULT ANSWER' (Pre-fill answer with a default), 'LINKED JIRA FIELD' (Summary), and 'VALIDATION' (Response required, Must match Regex pattern, Minimum/Maximum characters).

Publish forms to the JSD portal so teams can collect the specific information they need for a given request type.

Allow requestors to update an issue after it has been created.

Attach multiple forms for a requestor/approver to fill out. Perfect for more complex processes.

[illegible]

CONFLUENCE-LIKE FORMS IN JIRA

Layout Fields

Add structure to forms, by using tables and columns to layout fields on a form.

Collect the right data

Use one of 10 question types to ensure you collect the right data

Validate the data

Use field level validation to ensure the data you collect complies with your business rules.

Form: Bug Triage

PROJECT: ISD

SettingsBuilderPreviewIssue JSON

AaB I...≡A≡≡≡≡≡≡≡≡InsertSectionQuestion

This form is used to ensure that we accurately capture and describe a software bug that is identified in a support request. Typically this form is used internally; however, the agent may choose to make it external, so the customer can confirm that we have captured the right information to understand the bug.

Summary*

One line description of the bug

The issue in more detail and the steps involved to create the problem.

Hosting

☐ Cloud

☐ Server

☐ Data center

Browser

In which browser(s) are you experiencing the problem

☐ Chrome

☐ Edge

☐ Internet Explorer

Question

Questions provide a place for answers to be filled in.

TYPE

Long text

LABEL

Summary

DESCRIPTION

One line description of the bug

DEFAULT ANSWER

Pre-fill answer with a default

LINKED JIRA FIELD

Summary

VALIDATION

☒ Response required

☐ Must match Regex pattern

Minimum

5Characters

Maximum

No maxCharacters

Regex: Pattern (examples)

e.g. \d+

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☐ Must match Regex pattern

Minimum

5Characters

Maximum

No maxCharacters

Regex: Pattern (examples)

e.g. \d+

Improve the usability of forms by only showing the right questions to the relevant people. This can allow teams to you a single forms for multiple types of requests.

Sections of a form can be shown or hidden based on responses to previous questions.

Use a single form for multiple types of requests. Dynamic sections allow teams to collect exactly the information they need for a specific requests.

>

Form: Onboarding HR Checklist v2

PROJECT: DEMO

SettingsBuilderPreviewIssue JSON

AaB I...≡A≡≡≡≡≡≡≡≡≡InsertSectionQuestion▼

Employee entitled to benefits?

Yes▼

Section end

Section start: Benefit Entitlements

Health insurance application

☐ Yes
☐ No
☐ Not applicable

Retirement/401(k)

☐ Yes
☐ No
☐ Not applicable

Health savings account

☐ Yes
☐ No
☐ Not applicable

Child care savings account

☐ Yes
☐ No
☐ Not applicable

Section

Sections group questions for conditional logic.

NAME

Benefit Entitlements

SHOW SECTION

Conditionally

WHEN

Question:

Employee entitled to benefits?

IS ANY OF:

☒ Yes
☐ No

AUTOMATION

Automation Rules

Automatically add forms when an issue transitions to a status or transition to a specific status when a form is submitted.

Prevent Transition

Use ProForma's workflow validator to prevent a transition if a form (or forms) are either not attached or not submitted.

JSD Integration

Add forms to issues using ProForma's integration with JSD's inbuilt automation engine.

Form Automation

[Add Rule](#)

Form automation rules do repetitive tasks for you. Build rules to automatically change the status when a form is submitted, add a form, or prevent status changes unless a form is submitted.

Rules for this form



For **Request to use Logo** requests, when this form is submitted, if the issue status is **In Progress**, change the issue status to **Resolved**.

[...](#)

For **Request to use Logo** requests, when the status changes to **Waiting for support**, if the issue status was **In Progress**, then **add this form** to the issue, and set it to **External**.

[...](#)

SIMPLIFY JIRA ADMIN

Project level forms

Forms are specific to each project, this means project admins can build and maintain their own forms.

Project Toggle

Easily enable or disable ProForma for specific projects. Have 100s of projects, don't worry there is a bulk update toggle.

HTML Toggle

Control whether HTML blocks can be included in new forms. Useful for displaying images or YouTube videos.

Jira

←

Jira settings

Apps

ATLASSIAN MARKETPLACE

Find new apps

Manage apps

OAuth credentials

BETA

PROFORMA

Configuration

Connections

Forms

Getting started

DEEP CLONE

Getting started

ProForma Configuration

New Form Builder

EARLY ACCESS

If enabled, the new Proforma Form Builder can be used to create forms. [Learn more](#)

Project Configuration

Enabling ProForma on a project:

• Displays a Forms section on each issue or request.

• Allows users to add and fill out forms on issues and requests.

• Service Desk: Allows forms to be published to the portal.

Disabling ProForma does not delete any data. Forms and data will be restored when ProForma is re-enabled on the project.

Project Name	Key	Type	Enable all
Classic SD Race	CSR	Service Desk	<div><div>✓</div><div></div></div>
Human Resources	HR	Service Desk	<div><div>✓</div><div></div></div>
IT Management	ID	Service Desk	<div><div>✓</div><div></div></div>
ITSM Service Desk - Atlassian Open	ISDAO	Service Desk	<div><div>✓</div><div></div></div>
Legal Team	LT	Service Desk	<div><div>✓</div><div></div></div>

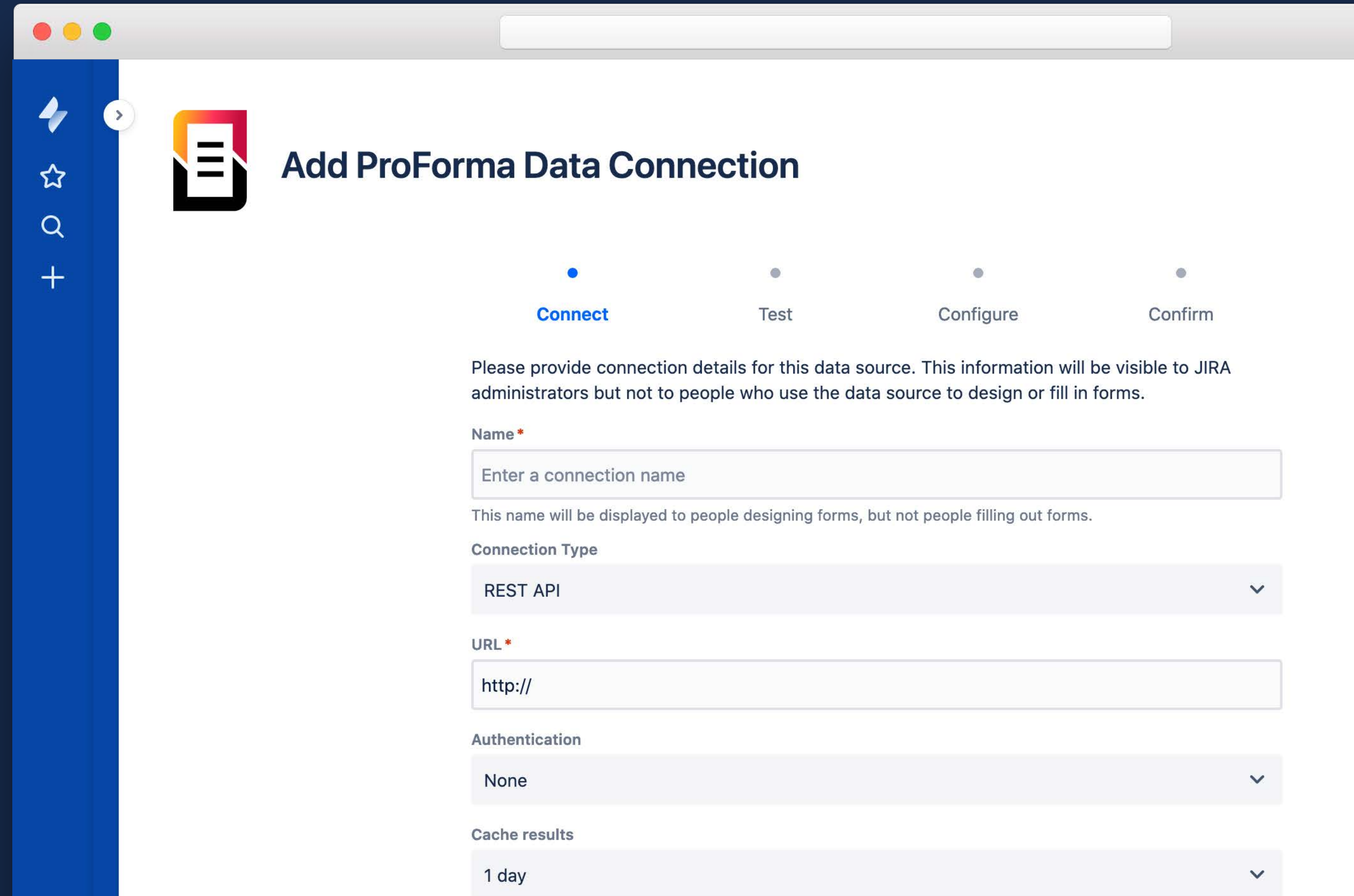
Connect to REST APIs

Jira Properties

Retrieve values from Jira properties to populate choice lists.

Cacheing

Improve performance by setting the values to cache at an appropriate interval.



POWERFUL VALIDATION

Complete Data

Mark questions as required,
preventing submission of the
form until a response is provided

Correct formatting

Use Regex validation to ensure you get exactly the information you need in the right format (i.e. version numbers).

Set limits

Set minimum and/or maximum validation rules on dates, character/word counts or numbers.

AaB I ...≡ A ≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡ InsertSectionQuestion

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Hosting

Cloud

Server

Data center

Browser

In which browser(s) are you experiencing the problem

Chrome

Edge

Internet Explorer

Firefox

Opera

Safari

Other

Question

Questions provide a place for answers to be filled in.

TYPE

Long text

LABEL

Summary

DESCRIPTION

One line description of the bug

DEFAULT ANSWER

Pre-fill answer with a default

LINKED JIRA FIELD

Summary

VALIDATION

Response required

Must match Regex pattern

Minimum

5Characters

Maximum

No maxCharacters

Regex: Pattern (examples)

e.g. \d+

Regex: Message if input is invalid

QUESTION KEY

CREATE ISSUES WITH FORMS

Create issues

Any form can be configured so that it can be used to create an issue within Jira.

Make Jira easier

Guide people through the process of creating an issue in Jira by laying out the fields in a logical order and adding instructions and examples where needed.

No Screen Config

Easily collect the required information without having to touch screen configuration.

The screenshot shows the Jira 'Create an issue using a form' interface. The left sidebar contains navigation links: Queues, Customers, Reports, Raise a request, Knowledge base, Channels, Invite team, Issue forms, Add shortcut, and Project settings. The main content area is titled 'Create an issue using a form' and displays the following information:

- Form Name:** New Hire Onboard Request
- Project:** Human Resources
- Type:** People

A 'Change' button is located next to the Project field. Below this, the form is divided into sections:

New Hire Onboard Request

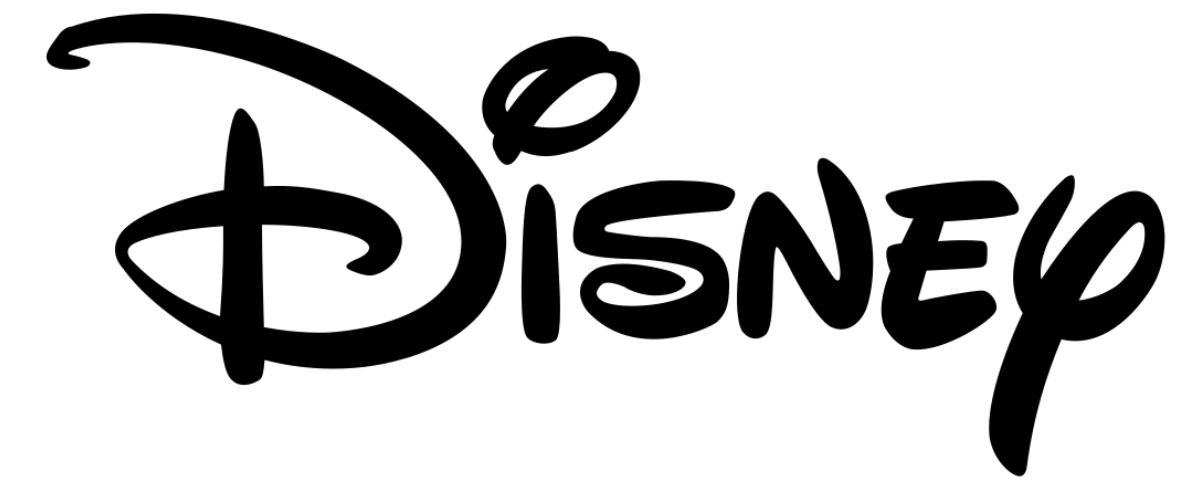
New Employee Information

Name <input type="text"/>	Supervisor <input type="text" value="Select..."/>
Job title <input type="text"/>	Start date <input type="text" value="e.g. 01/01/2019"/>

Office Setup

Work location <input type="text"/>	New workstation needed? <input type="radio"/> Yes <input type="radio"/> No
Name badge needed? <input type="radio"/> Yes <input type="radio"/> No	After hours access needed? <input type="radio"/> Yes <input type="radio"/> No

SOME OF OUR CUSTOMERS



REPORTING

Exported Forms


Export form responses to a spreadsheet for an aggregated view of what has been submitted.

Jira Reports

Link any form field to a Jira field to have the data included in Jira reports.





JQL Queries

Form fields linked to Jira fields can be searched using JQL queries.



ProForma Forms

+ Create Form

Form	Project	Associated Request/Issue Type	Updated	Actions		
Control Test Verification	Compliance	GRC Test	10 Mar 2020	Edit	Download	
Control testing	Compliance	GRC Test GRC Test	10 Mar 2020	Edit	Download	
Control Overview	Compliance	GRC Control Activity GRC Control Activity	9 Mar 2020	Edit	Download	
Risk Assessment	Compliance	GRC Risk	10 Mar 2020	Edit	Download	

LANGUAGE SUPPORT

25 Languages

Support for 25 languages including English, German, Spanish, Japanese, Russian and Vietnamese.

Designate Form Language

Error and validation messages displayed in the form's designated language.

End-User Documentation

End-user documentation provided for 25 languages.

The screenshot shows a web browser window displaying a form titled "Servicio de Jurado" in Spanish. The form is in "VIEWING" mode, as indicated by the "VIEWING" label and the "OPEN" button in the top right. A blue header bar reads "Editando el formulario". Below this, the form title "Servicio de Jurado" is followed by three buttons: "Someter" (highlighted in blue), "Guardado", and "Bloquear". A prominent red error banner contains the message: "⚠ No se puede someter el formulario. Cambia las respuestas no válidas y vuelve a intentarlo." The form fields include: "Nombre *" with the value "Diego Bernal"; "Fecha en que recibiste la citación del jurado *" with the value "10/10/2019" and a calendar icon; and "Primer día del servicio de jurado *" with the value "e.g. 01/01/2019" and a calendar icon. A red border highlights the last field, and a red message at the bottom states "⚡ Este campo es requerido."

APP INTEGRATION

Refined for JSD

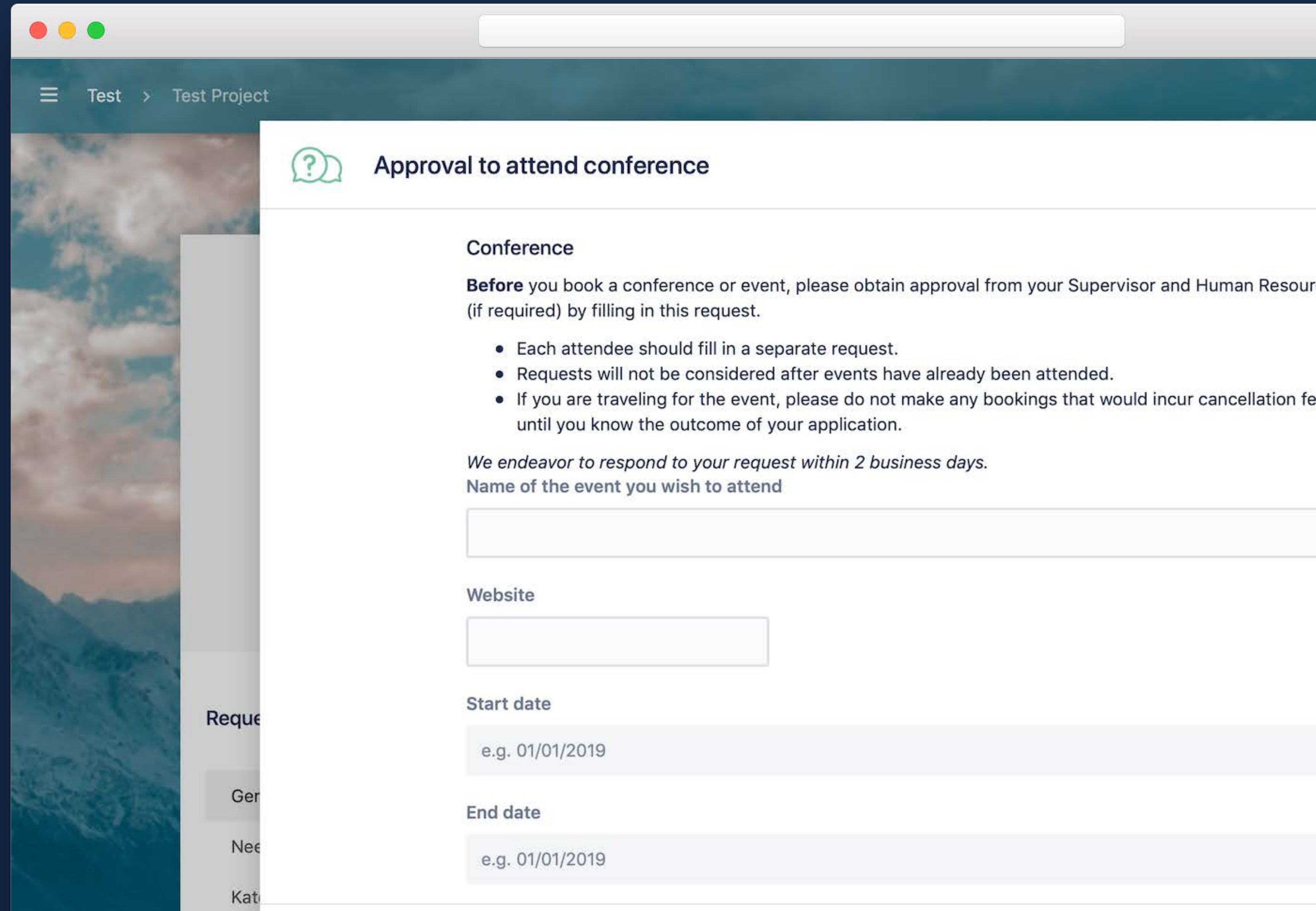
ProForma forms are compatible with Refined Structure and Theme for JSD

Configuration Manager

ProForma forms can be managed and migrated with Configuration Manager for Jira

Other Apps

ProForma works with a range of other apps including ScriptRunner.



The screenshot shows a web browser window displaying a Jira form titled "Approval to attend conference". The form is overlaid on a background image of a mountain landscape. The form includes a header with a question mark icon and the title. Below the header, there is a section titled "Conference" with a paragraph of instructions and a bulleted list. The instructions state that approval must be obtained from a supervisor and HR before booking a conference, and that requests will not be considered after events have been attended. The bulleted list contains three items: each attendee should fill in a separate request, requests will not be considered after events have been attended, and if traveling for the event, bookings should not be made until the outcome of the application is known. Below the list, there is a paragraph stating that the request will be responded to within 2 business days. The form then has three input fields: "Name of the event you wish to attend", "Website", and "Start date". The "Start date" field has a placeholder text "e.g. 01/01/2019". Below the "Start date" field, there is an "End date" field, also with a placeholder text "e.g. 01/01/2019".

Test > Test Project

Approval to attend conference

Conference

Before you book a conference or event, please obtain approval from your Supervisor and Human Resources (if required) by filling in this request.

- Each attendee should fill in a separate request.
- Requests will not be considered after events have already been attended.
- If you are traveling for the event, please do not make any bookings that would incur cancellation fees until you know the outcome of your application.

We endeavor to respond to your request within 2 business days.

Name of the event you wish to attend

Website

Start date

e.g. 01/01/2019

End date

e.g. 01/01/2019

ENTERPRISE READY

Enterprise SLA

Our SLA has target response time of one hour. View the SLA at www.thinktilt.com/sla

24 hour support

We monitor our support channels 24 hours per day to ensure that critical issues are addressed immediately.

Experience

We have over a decade of experience meeting the support requirements of large enterprises and federal government agencies.

ThinkTilt

ProFormaResourcesPartnersSupportAboutBlog

TRY PROFORMA

Service Level Agreements & Escalation Policy

Priority	Highest	High	Medium	Low	Lowest
Response Target	1 hour	1 hour	1 hour	1 hour	1 hour
Response required	2 hours	4 hours	8 hours	8 hours	8 hours
Resolution	Working on reasonably continuing basis until resolution is reached	Within 2 business days	Within 4 business days	A notified resolution date, typically between 4 to 8 business days	A notified resolution date

LIBRARY OF FORMS

250+ Templates

Template forms makes it easy to demonstrate potential for business teams.

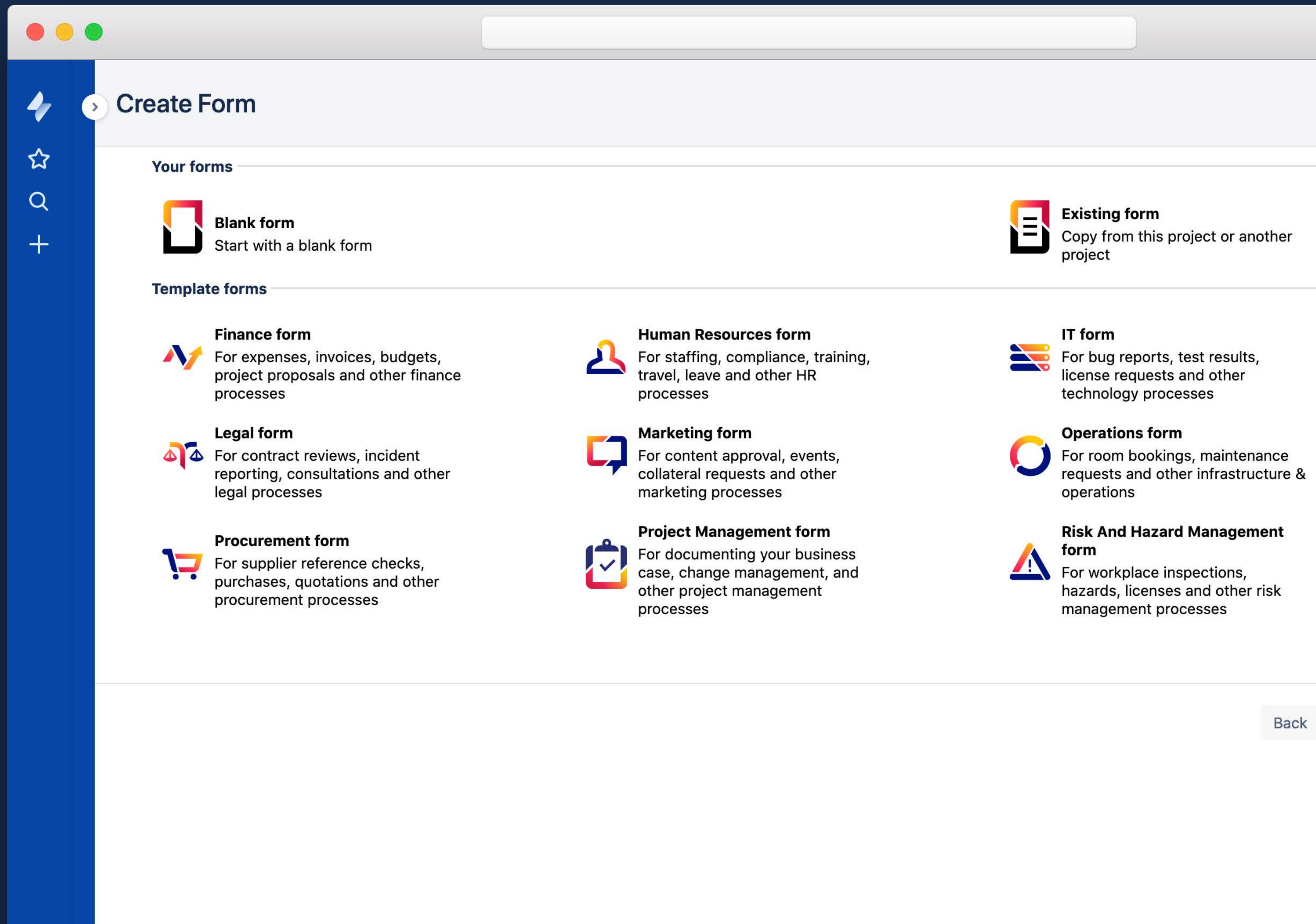
Creative Commons

All forms are freely available.

Templates were built in consultation with business experts and can be easily modified to match your teams' processes.

Ever Growing

We are continue to expand our template library. Let us know if there is something missing and we'll gladly add it for you.



KNOWLEDGE FOR EVERY TEAM

eBooks

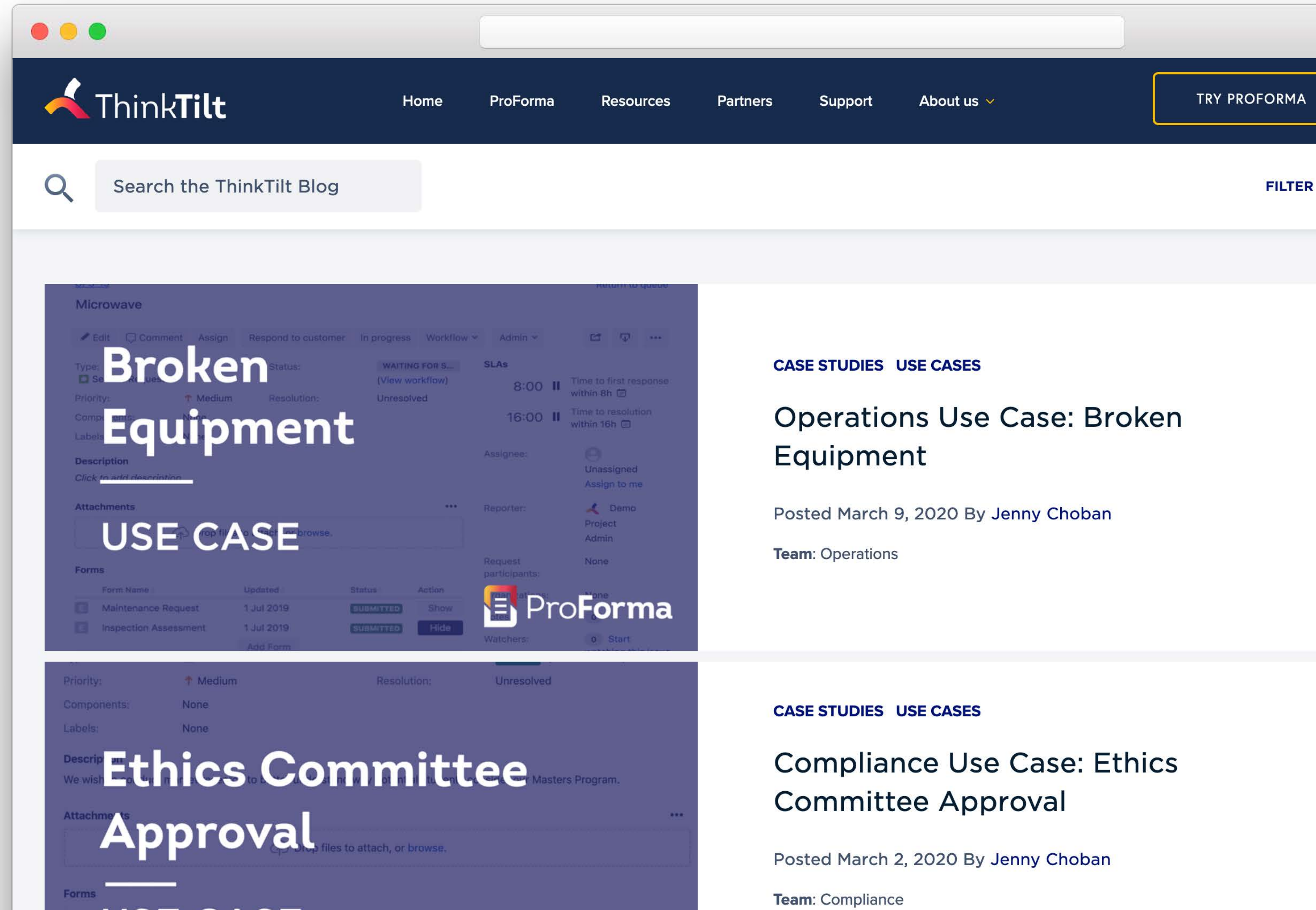
Free ebooks on Battling Jira Custom Field Bloat, and Effective Jira Administration.

White Paper

From ITSM to ESM: Enterprise Service Management with Jira Service Desk.

Regular Articles

We have written hundreds of articles on how every team can benefit from using Jira. Available at blog.thinktilt.com



EXAMPLES: SOFTWARE DEVELOPMENT TEAMS

Bug Reporting

Depending on a bug reported ensure that you are given the information you need to properly replicate it.

Browser Testing

Ensure that when a problem is reported that it is tested against the right browsers.

Code Reviews

Ensure that managers/ reviewers provide all of the necessary information when reviewing an issue.

Form: Bug Triage

PROJECT: ISD

SettingsBuilderPreviewIssue JSON

Save

Close

Editing Form

This form is used to ensure that we accurately capture and describe a software bug that is identified in a support request. Typically this form is used internally; however, the agent may choose to make it external, so the customer can confirm that we have captured the right information to understand the bug.

Summary

One line description of the bug

The issue in more detail and the steps involved to create the problem.

Hosting

Browser

In which browser(s) are you experiencing the problem

Hidden section – Conditions apply

live Version

Dev/Forms version

Share a a supervisor's or HR's response to an individual's career development plan.

>

We're updating the issue view to help you get more done. [Learn more](#) or [See the old view](#)

Give feedback

Back Projects / Human Resources / HR-4

Diana Developer

Create subtask Link issue Add Form

Kate Caldecott raised this request via Portal
[View request in portal](#)

Forms

Form Name

Add Form

E New Hire Onboard Request VIEWING OPEN

I Onboarding HR Checklist SUBMITTED

I Onboarding IT Checklist SUBMITTED

I Onboarding Ops Checklist SUBMITTED

Editing Form

New Hire Onboard Request Submit Saved Close

New Hire Onboard Request

New Employee Information

Name Supervisor

Done

Assignee
Unassigned

Reporter
Kate Caldecott

Request Type
New Hire Onboard

Due date
2020/03/30

Priority
Medium

Show 11 more fields
Labels, Request participants, Approvers, Position Ti...

Created March 5, 2020, 7:52 AM
Updated March 5, 2020, 8:07 AM

Configure

EXAMPLES: MARKETING TEAMS

Sponsorship

Receive, assess and approve sponsorship applications.

Logo Use

Ensure the correct procedure is followed for the use of an organization's logo.

Graphic Design

Receive an initial application, detailed scope and approved costings for a new design request.

Create Form

Category: Marketing

Select a form template *

Add event to calendar

Add event to calendar

Event data entered

Advertising requisition

Advertising requisition

Alcohol permit

Filter Templates

Form name *

Previewing Form

Person requesting event (this information will not to be published)

Name

Job title

Unit

Department

Phone

Mobile

PROFORMA LITE

Similar Features

ProForma and ProForma Lite have almost the same features. Lite misses out on rich PDFs, data lookup and some fields.

3 Form Templates

ProForma Lite limits you to building/designing 3 different forms across a Jira instance.

Unlimited Submissions

Receive as many form submissions as you want; attached to an unlimited number of issues / requests.

The screenshot shows a web application window titled "Form: Bug Triage" with the subtitle "PROJECT: ISD". The interface includes a top navigation bar with "Settings", "Builder", "Preview" (active), and "Issue JSON" tabs. A "Save" button and a "Close" link are in the top right. A left sidebar contains icons for a lightning bolt, a star, a magnifying glass, and a plus sign. The main content area is titled "Editing Form" and displays a "Support Triage" form. The form has three sections: "Components" with a question "Which component(s) does this bug relate to?" and a list of checkboxes (JSD Portal, Jira Issue / Request, Permissions, Automation / Workflow, Compatibility with other Apps, Form Builder, Other...), a "Can you reproduce?" section with radio buttons for "Yes" and "No", and a "Requested further info" section with checkboxes for "HAR file", "Console logs", "Support Zip", "Check AWS logs", and "Screen shots/ recordings requested". A "New option..." button is located below the "Other..." checkbox in the "Components" section.

Form: Bug Triage
PROJECT: ISD

Settings Builder **Preview** Issue JSON

Save Close

Editing Form

Support Triage

Components
Which component(s) does this bug relate to?

- ☐ JSD Portal
- ☐ Jira Issue / Request
- ☐ Permissions
- ☐ Automation / Workflow
- ☐ Compatibility with other Apps
- ☐ Form Builder
- ☐ Other...

New option...

Can you reproduce?

- ☐ Yes
- ☐ No

Requested further info

- ☐ HAR file
- ☐ Console logs
- ☐ Support Zip
- ☐ Check AWS logs
- ☐ Screen shots/ recordings requested

TRY THE INSTANT DEMO

Instant Demo

Experience the latest ProForma form builder with a free, full-featured demo.

thinktilt.com/instant-demo

No login required

The ProForma demo is available at the link above without any login or email required.

Save your forms

Build as many forms as you like and take them with you. Simply copy and save the Issue JSON.

The screenshot shows the ProForma Form Builder Instant Demo interface. At the top, there's a navigation bar with the ProForma logo and links for ProForma, Resources, Partners, Support, About Us, and a 'Try it free' button. Below the navigation bar, the title 'ProForma: Form Builder Instant Demo' is displayed. There are three dropdown menus for selecting an example form, a team, and a template team form. Below these, the 'Form: Example Form' is shown, with tabs for Settings, Builder (selected), Preview, and Issue JSON. The Builder tab is active, showing a rich text editor with various formatting options (bold, italic, text color, background color, link, unlink, list, indent, quote, info, etc.). The main content area displays a form with two sections: 'A Form with Everything' and 'Your Jira Forms Drive Data Quality'. The 'A Form with Everything' section contains a paragraph of text. The 'Your Jira Forms Drive Data Quality' section contains a paragraph of text. On the right side, there's a 'What's new' button, a 'Save' button, and a 'Close' button. A vertical 'Provide feedback' button is also visible on the far right.

REQUEST A PERSONAL DEMO

Free Demo


We provide demos of ProForma at no cost and with no obligation. thinktilt.com/personal-demo

ACE Talks

Need a speaker for your ACE meeting? Let us know.

Technical Q&A

Our technical team will be happy to answer any questions you have about ProForma.



ProForma Demonstration with Kate Caldecott (ThinkTilt)

<

December

>

SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

How long do you need?

30 mins

1 hour

What time works best?

UTC -06:00 Bahia Banderas, Merida, Mexico City, and Monterrey

1:00 pm

1:15 pm

1:30 pm

1:45 pm

2:00 pm

2:15 pm

2:30 pm

FIND PROFORMA ON MARKETPLACE

All hosting

ProForma is available for Cloud, Server, and Data Center
thinktilt.com/proforma-marketplace

More details

Find the feature list, compare ProForma to other apps, and link to documentation

Languages

See the list of 25 languages supported by ProForma

The screenshot shows the Atlassian Marketplace page for the ProForma app. The header is blue with the Atlassian logo and 'Marketplace' text. A search bar and 'Help'/'Log in' links are on the right. The main content area features the ProForma app card, which includes the app icon, name, developer (ThinkTilt), version compatibility, and a 'Try it free' button. Below the app card is a navigation bar with tabs for Overview, Reviews, Pricing, Support, Versions, and Installation. The main content area below the tabs contains a large video player with the title 'Forms Done Right' and a description: 'Build an unlimited number of dynamic forms or checklist directly within Jira, without code or custom fields'. At the bottom, there are three smaller screenshots showing examples of forms created with ProForma, including 'BUILD DYNAMIC FORMS AND CHECKLISTS', 'ENHANCE JIRA SERVICE DESK', and 'CONFLUENCE-LIKE FORMS IN JIRA'.

ATLASSIAN Marketplace Search for apps Help Log in

ProForma: Forms & Checklist for Jira
by ThinkTilt
for Jira Cloud, Jira Server 7.3.0 - 8.12.3, Jira Data Center 7.3.0 - 8.12.3 and more versions
Try it free Buy it now

★★★★★ 25 1,290

SUPPORTED JIRA SERVICE DESK

Overview Reviews Pricing Support Versions Installation Cloud

ProForma

Build an unlimited number of dynamic forms or checklist directly within Jira, without code or custom fields

Forms Done Right

BUILD DYNAMIC FORMS AND CHECKLISTS
Conditional forms
Fewer Custom Fields
Project Level Admin

ENHANCE JIRA SERVICE DESK
Better Requests
Update Requests After Creation
Support Complex Process

CONFLUENCE-LIKE FORMS IN JIRA
Layout Fields
Collect the right data
Validate the data



Thank you.

WEB: [THINKTILT.COM](https://thinktilt.com) | MARKETPLACE: [THINKTILT.COM/PROFORMA-MARKETPLACE](https://thinktilt.com/proforma-marketplace)