ClearVision

NINJA GUIDE TO

Jira Work Management

INTRODUCTION

The following guide is designed to give you a head start when working with Jira Work Management (JWM). JWM is primarily used by business teams like Marketing, HR, and Legal who want better ways to manage both incoming requests from other teams, as well as their own proactive work.

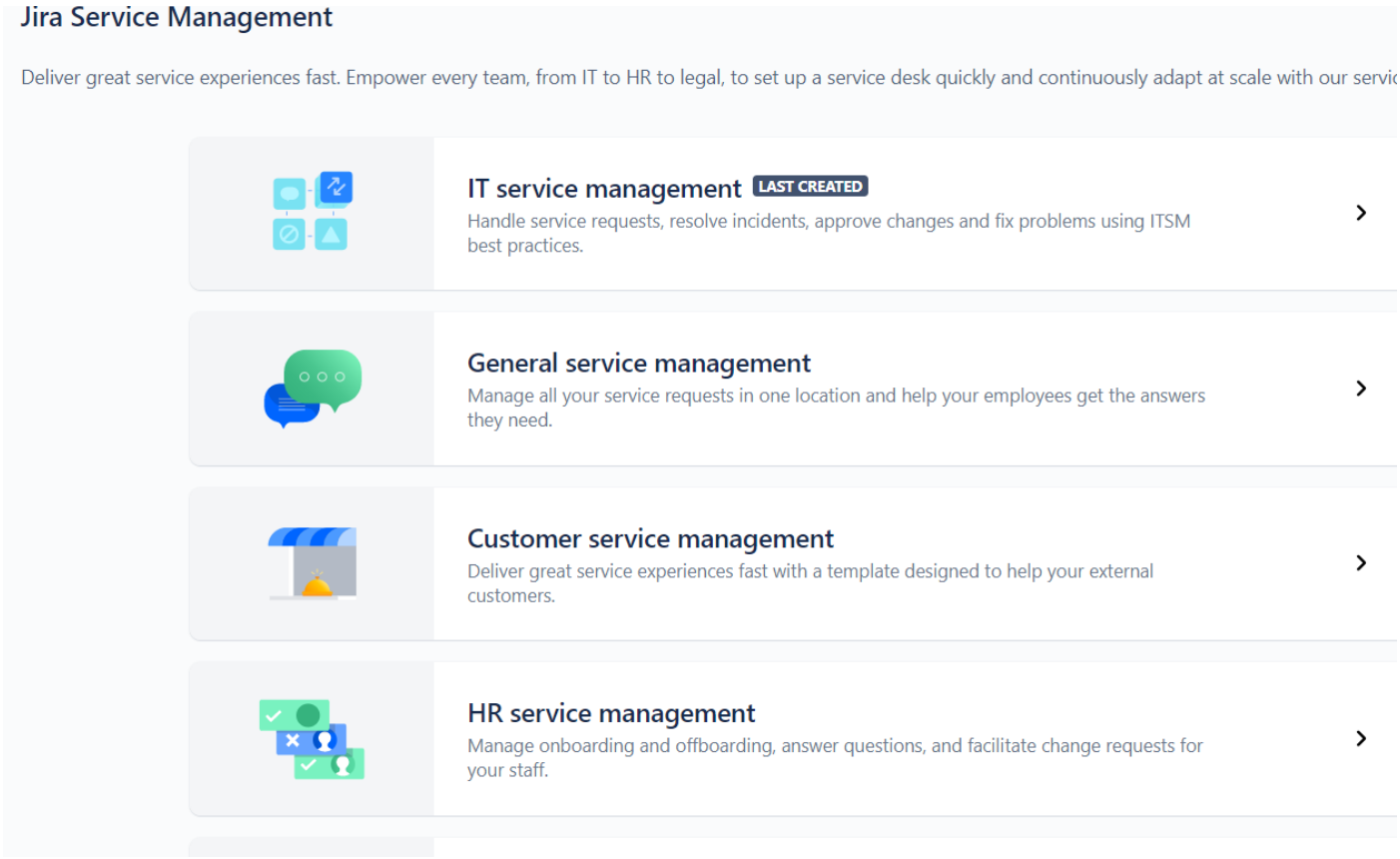
While this guide includes everything intended to help the new user get started, mentoring should be considered. Clearvision offers this per day or as part of its Experts on Demand subscription-based service.

GETTING STARTED

The best way to get started is to think about the work being done in your team and create a table of data points that need to be captured for the tasks to be managed in Jira. While the majority of your work could be categorised as a 'task', you may want to use custom fields to show where and what the actual work is. Of course, you can create additional issue types (types of tasks), but by writing them down in a table with all the required fields, you can better see the gaps and requirements. To begin this process, it's a good idea to use a spreadsheet. Create a table like the one below and start collecting information. Where you have specific information, like possible applications or departments, provide a list as shown.

REQUEST NAME	INFORMATION NEEDED/PREFERRED TO COMPLETE THE WORK	MANDATORY FIELD
Task	Summary	Yes
	Description	Yes
	Due date	Yes
	Department: · Sales · Marketing · IT · Recruitment	No
	Attachment	No
Request for new role	Summary	Yes
	Description	Yes
	Line Manager Department Salary Job description	Yes

Now that you've done the preparation, you can create the first JWM project for your team. Start by going into Jira, click 'projects' at the top, then 'create project'. Next, you'll be prompted to select the type of project.



These templates are a good starting point. They will create some basic workflows, add in common requests for the type of project, and help propel you forward. You can click on each arrow for a further breakdown of what the template has to offer.

CONFIGURING ISSUE TYPES AND SCREENS

NOTE

Please note, the following activities require Administrator privileges.

Issue types are the different types of work carried out as a team. The default 'task' issue type covers a lot of internal work, but you can also create new issue types, for example, a new employee request for Recruitment, or a new campaign request for Marketing. The above exercise will have helped to map out your needs and identified the issue types required.

Head into the admin console by clicking the cog in the top right corner, then select issues. This is where you will create the main types of work you'll do as a team. Click 'create new issue type', provide a name, choose an icon, and click 'save'. Once you have created all of the issue types that you need, click on the 'issue type schemes' on the left. Now, add all the newly created types into your project. The best method is to find your project name within the list of used schemes, then select 'edit' on the right. Drag and drop the relevant issue types from the right list to the left, then click 'save'.

The next step is to create the additional data points needed for forms, also known as 'custom fields', which come in many types. You can have single selects, multi-selects, number, text, URL, and more. Go through the list of fields you need, search to see if a similar field already exists that you can reuse, and create any that are missing.

NOTE

You should always reuse fields where possible. This keeps the system clean and will help users when creating filters as the list of possible fields will not show duplicates.

When creating the fields, skip the step that asks you to place them on a screen. While you can add straight to a screen, if you know it already exists and you are happy for it to be at the bottom, this is an easy alternative. Otherwise, it is best to wait until the next step.

Now you need to start creating the screens, better described as the actual forms you fill in to create the issues. By default, when you create a new project, Jira will produce one screen and the relevant schemes for you. If you created more issue types and their forms are different, create new screens for them. Do this by clicking 'screens' on the left side of the 'create screen' towards the top right. Once you have created a screen, you will need to put all the relevant fields on it. As a minimum, you need the summary (the rest is determined by the table you created at the start). To add them in, repeat this process until all the fields you need are present. To reorder them, simply drag and drop the field into its new position.

Once the screens are made, you need to make the screen scheme. The screen scheme is designed to apply the screen you just made to one of three actions — creating, viewing or editing a ticket, or a combination of the three. You can create additional screens for the actions if you need them to be different, otherwise, select one of the screens you made, and leave it as the default choice.

Finally, you'll need to tie the screen schemes to the project. Do this by using the issue type screen schemes. The project uses the scheme like a look-up of issues. In other words, when you go to the project and view pre-existing issue/create an issue, the project will look up the selected issue type and see which screen scheme it needs to use to show the fields. To kick this off, go to 'issue type screen schemes' on the left side, then find the scheme in use with your project and click 'configure'. If you are updating the screen schemes used or adding them in for the first time, you'll need to click 'add issue type' toward the top right, select the screen scheme you wish to use and the issue type it belongs to, then click 'save' and repeat. If you are simply updating the scheme used, choose the appropriate edit next to the name.

GETTING WORKFLOWS RIGHT

Workflows are how you move the issue through its lifecycle from creation to resolution. Each workflow can only have one entry point but can have as many resolution points as required.

A workflow is made up of two items, the statuses and the transitions between them. Transitions can also have additional settings. These are conditions, validators, and post functions. Conditions are pre-execution checks, for example, is the user in a certain group? If not then the option won't appear. Validators are during execution checks on data in fields or date comparisons. Post functions are actions to take place once the transition has been executed. These are often around updating custom fields or assigning to different users, etc.

When it comes to building the workflow, head to the 'workflows' tab in the admin console on the left-hand side. Then click 'create a new workflow'. It is often easier to create the new workflow in 'diagram mode'. You can make sure you are in this view by clicking the 'diagram' button.

Use the 'add status' button to start building all your statuses in the workflow. Position them roughly in the order you want them in. To start adding in the transitions between statuses, click on the first, then using the dots around the edge, click and drag to the next status. Give it a name and click 'add'. Repeat until your workflow management is built. Now is a good time to add in conditions, validators, or post functions needed in your workflow. Speak to your System Administrators about the options in your Jira instance. While building workflows is fairly intuitive, there are a few things to consider.

People often get confused between the human process of what to do with the task and the workflow steps present in Jira. This is not to show every possible thing you may do within the human process. For example, if dealing with a new employee, your workflow may show research, review, job advertised, or job fulfilled, while the human process may have more intricate steps involved at each of these points.

It is important to provide users with control. Often, workflows forget that humans exist. Everyone makes mistakes be it moving the wrong ticket or selecting the wrong transition. By providing 'go back' options as well as not overly restricting transitions with conditions or validators, you can ensure that users stay in control over the tool rather than the tool controlling them.

Stick to tenses. Chopping and changing between tenses can leave users confused about when to move tickets to the new status. By keeping statuses in one tense and transitions in another, you aid the user's ability to understand when tickets should move whilst keeping them up to date.

Resolutions and statuses are different. Statuses are positions issues sit in within the workflow. When it comes to completing statuses, you can of course add as many as needed; cancelled, done, duplicate, etc. However, you will never be able to create enough statuses to cover every eventuality for all issues. This is when it is better to use resolutions. You can keep the number of statues to a minimum, for example, 'done', and use resolutions to mark what makes it so. If you have multiple transitions in a status, depending on the workflow, you can use post functions to preset the resolutions you want to use.

The happy path is the shortest to get from creation to closure and to ensure users do not spend all their time clicking buttons and moving issues through the workflow. Your happy path should ideally be a maximum of six to seven statuses long. This does not mean other statuses of values cannot exist, e.g., on hold or blocked, etc. But the happy path, the most common and direct route for a ticket to travel, should ideally have fewer than 6 statuses.

DASHBOARDS AND REPORTING

Jira comes with its own built-in query language known as Jira Query Language (JQL). JQL is how you effectively create filters that are later used on dashboards or for subscribing to reports. With every team, there is a level of reporting requirements. Whether it stems from a business need or starts as a curiosity, every team likes to know whether they are on the right track. The most important thing to remember with any reporting is a clear goal of what it's providing and actions you would expect to have. The best way to start reporting your needs is with a table, shown below. Use plain English if possible as this is easier to translate in and out of the tool.

REPORTING REQUIREMENT NAME	REPORTING REQUIREMENT DETAIL	NOTES OF POSSIBLE ACTIONS
Tickets by assignee	I want to see the open tickets and who they are assigned to to see if the work is being evenly distributed.	Will help release work from members that are being over-burdened.
Tickets by product	I want to see the split of tickets over 30-days (30d) in regards to which product they are being requested for.	Will show which product you are getting the most requests for, and whether further education/ training is required for the team and other end users.
Tickets by region	I want to see the split of tickets over 30-days (30d) in regards to what region tickets are being raised against.	Will show where you may need to focus efforts.
Tickets for UK region	I want to only see tickets that are for the UK region made in the last 30d.	

Once you have the reporting requirements for the project, you can start making the queries. For example, to look at tickets in the UK region, head to ‘filters’, then ‘advance issue search’.

Jira has two ways of searching; the ‘basic’ mode allows you to search using a point and click method to look up the field and select the answer. The ‘advanced’ mode is where you type the whole query in by itself. Each query is made up of three parts, a data point (field), an operator, and a value. To combine multiple queries into one, use keywords like ‘AND’, ‘OR’, ‘NOT’, or a combination.

For the filter, you need to know two different items of information, tickets opened for the UK region and tickets opened in the last 30d. Starting with the UK region, the first query would simply be:

region = UK

For the second, you'd need to include the 30th day:

created >= -30d.

To combine the two, you'd simply use 'AND', making the whole query:

region = UK and created >= -30d.

Don't forget, you may need to make this project-specific, in which case you would include:
project = <projectname>.

Once you are happy with your query, give it a name and click 'save'.

You can also put all filters on a single dashboard for easy viewing. Click 'dashboard', then 'create new dashboard', give the board a name, and click 'create'. Once loaded, add gadgets onto the dashboard, for example, a filter results gadget. Some other gadgets you may like to use include:

- Pie charts.
- Two-dimensional filter statistics.
- Issue statistics.

For deeper reporting requirements, you'll need to look at Marketplace apps, or integrating to external applications. If you choose the Marketplace app route, consider *Custom Charts for Jira* by *Old Street Solutions*, which provides a variety of chart styles with extensive customisations on each.

AUTOMATING EASY TASKS

No one wants to be pressing buttons or doing things that are meaningless and laborious. Tasks like moving tickets between statuses or adding issue data based on form details can be automated.

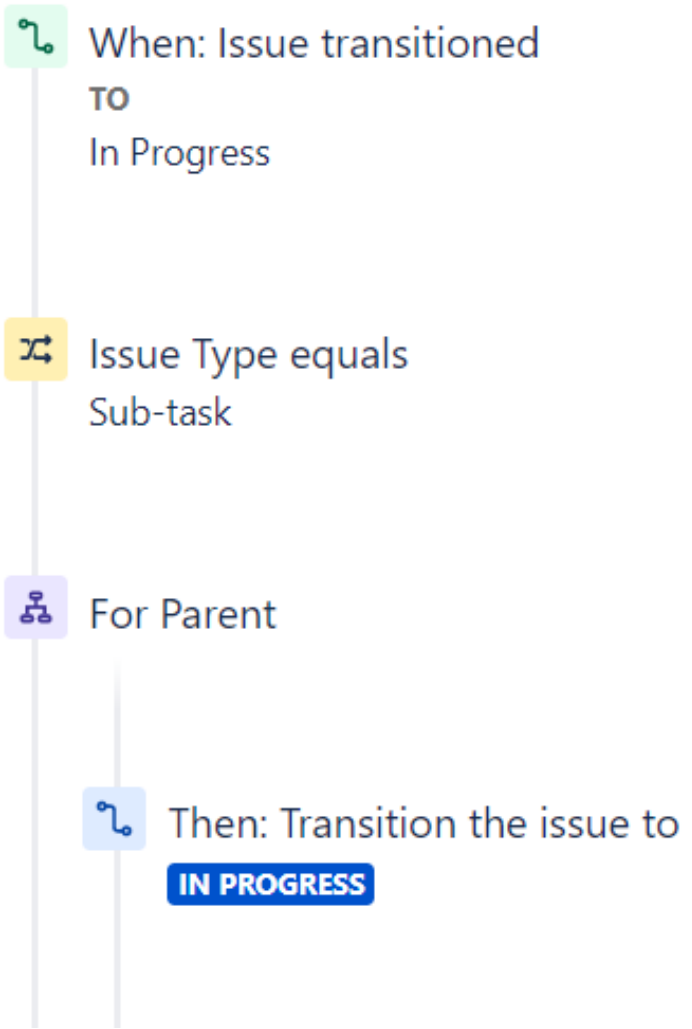
Automation for Jira offers Project Admins no-code automation rules that reduce the technical debt whilst providing the power.

Every rule requires a trigger and at least one action. Typical trigger points are when issues are created, commented on or transitioned, or when fields are edited or on a schedule to run. Actions are everything you would expect, create, edit, comment, or transition an issue. You can also send notifications to external chat tools like *Teams* or *Slack*, or even send out external webhooks as actions.

TRANSITION BETWEEN STATUSES

It is very common for tasks to have multiple sub-tasks or even be part of a larger project possibly under an epic. When this occurs, users often forget to keep all sets of tickets up to date. In this case, you can set up a rule so that any time a child ticket or a ticket in an epic is started/resolved, you can ensure the tickets are transitioned to keep them in line.

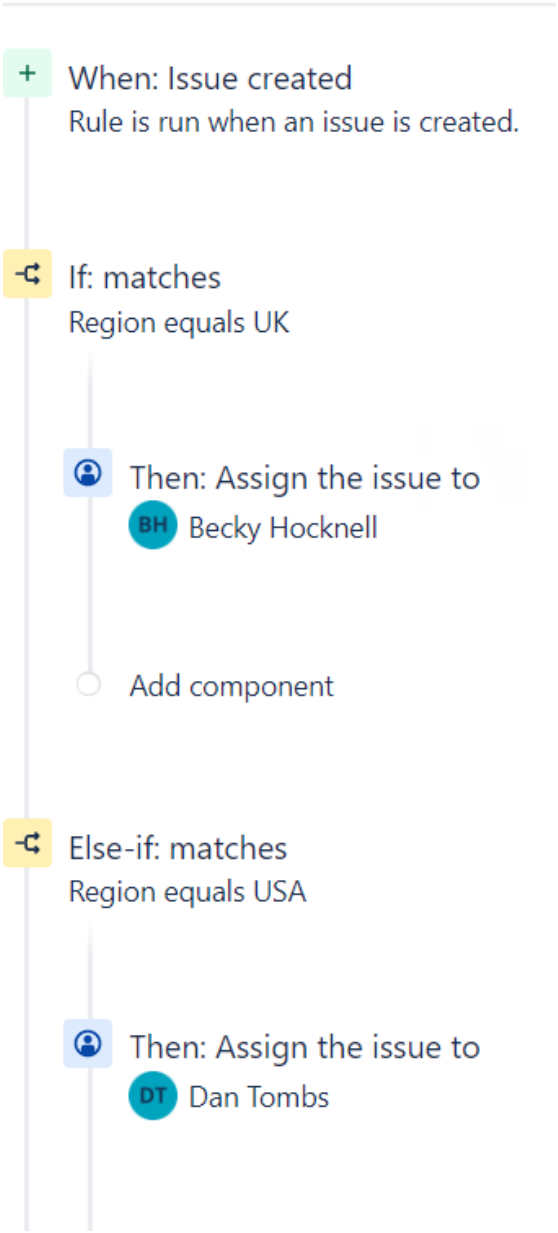
When a subtask is created (moved to 'In Progress') the automation rule will update the parent to move to 'In Progress' as well. To start this rule, the trigger point will be 'issue transitioned', then you can place a quick condition to only allow the rule to continue if the issue is a sub-task. Next, you'll want to add a branch to



make actions for the parent ticket. Finally, add an action for it to transition the issue to 'In Progress'.

AUTOMATICALLY ASSIGNING TICKETS BASED ON INFORMATION

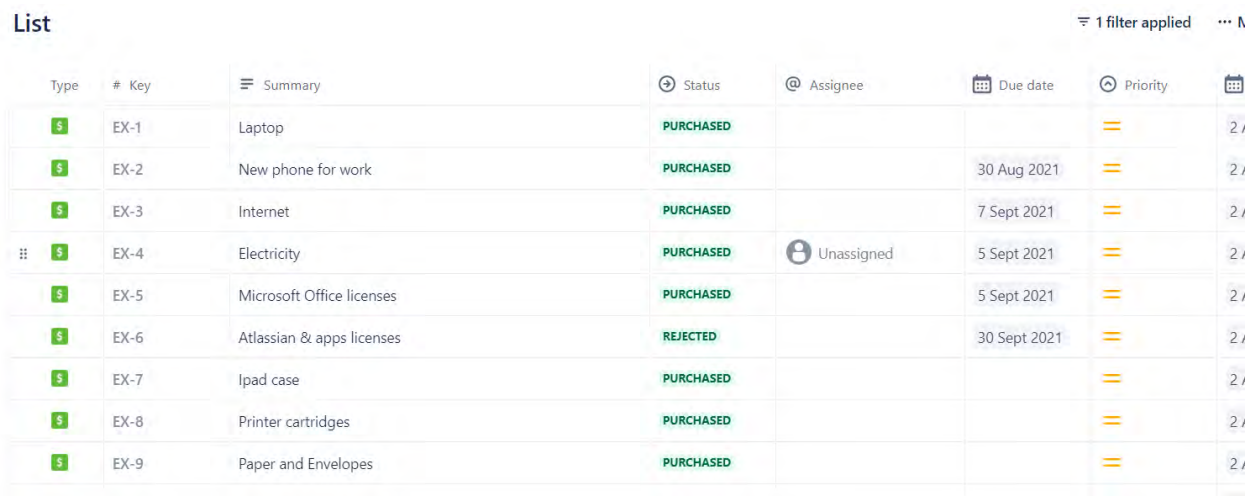
It is very common when a ticket is created for additional information to be added to help with reporting or to auto-assign tickets based on the data. For this example, to assign the ticket based on the region selected, the trigger point is ‘issue created’. This is because you’ll need the additional data as soon as the ticket is created. Next, use the if/else condition for the region. The issue fields condition will enable you to look up the region and pull out the value needed. Then, for each ‘if’ statement, select ‘edit issue’ as the action. This will allow you to edit the assignee as well as any other fields at the same time. Repeat this step until all statements are complete.



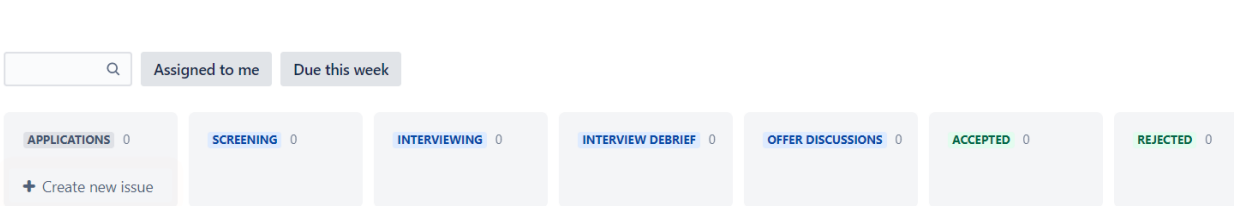
WORKING WITH THE TICKETS

VIEWS WITHIN JIRA WORK MANAGEMENT (JWM)

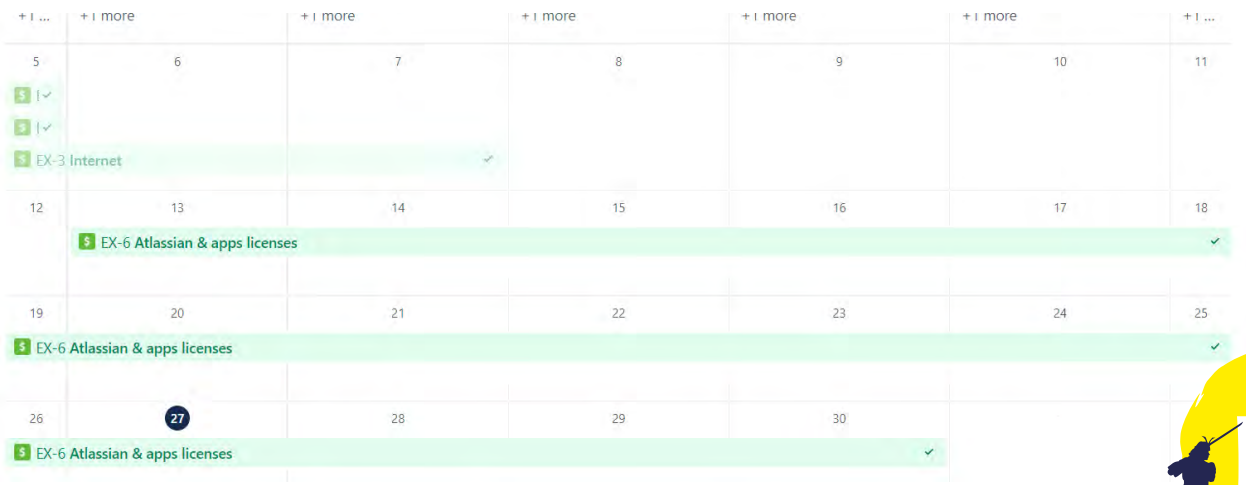
Jira Work Management projects come with a variety of ways to view the same data. This allows team members or teams as a whole to work in ways that feel comfortable. The list view is the closest to a spreadsheet. Add as many columns as you need and continue to manage all tickets and data from this view.



The next view is the board which allows the visualisation of where tickets are within the workflow. This is JWM's answer to skirt the Kanban board. The board is configurable, allowing you to create additional quick filters, add colours, and configure columns.



JWM projects also have a calendar view. If your issues have date fields on, this can be helpful to show deadlines or certain tasks, such as new starters or leavers. Calendar views can also guide teams on possible open spots to accept work.

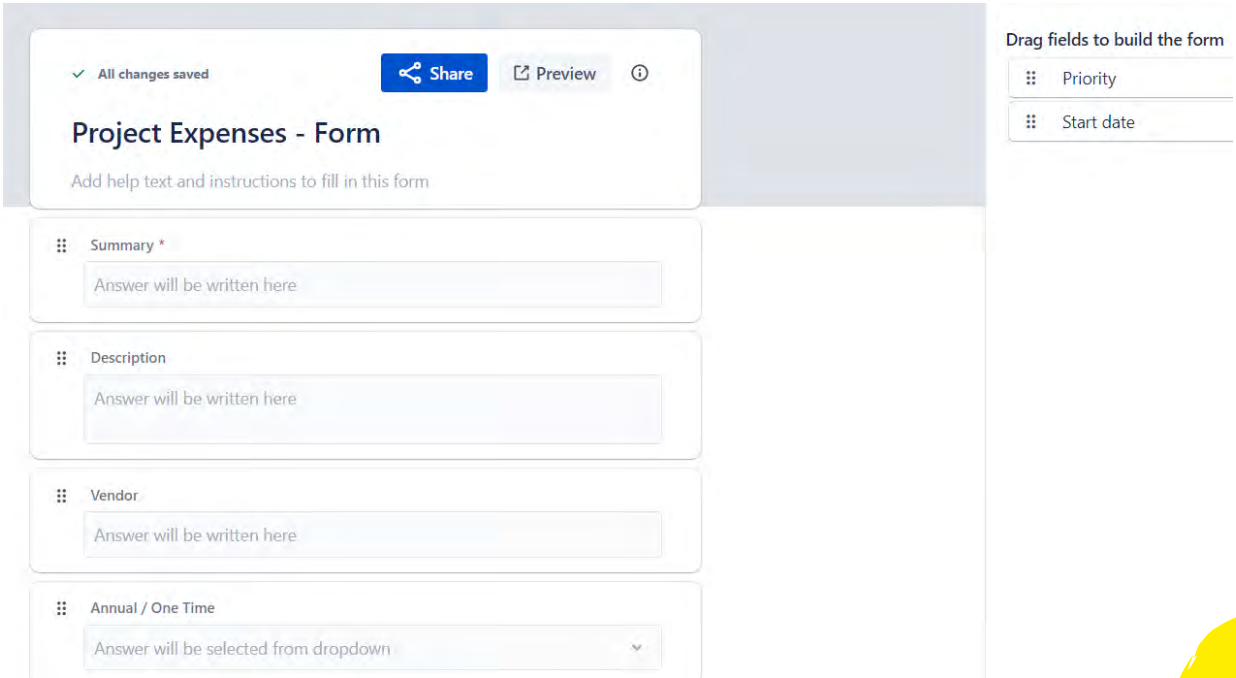


Finally, you have the timeline view. The timeline view is the closest view to Gantt charts. Having the ability to visualise all your teams' work throughout the year and show the dependencies on tickets can help you prioritise and maintain focus. You can easily click and drag between issues to create dependencies as well as edit the start and end dates of tasks.

JWM FORMS

JWM can also create request forms like Jira Service Management, the only difference is that there is no portal for users.

Having users follow a form can bring structure to requests, which helps teams gather information without having to immediately return to the reporter to request more. Creating the form is simple. Head to the form section while in the project, then using the available fields on the right side, drag and drop them into an order that makes sense to you. Just as with Jira Service Management, you can update both the name of the field and the description to provide additional assistance to the end-user. Once you have finished building your project form, you can choose to share it using a copied link or by entering the names of those you wish to see it.



ADVANCED LEARNING

Clearvision's team of Atlassian experts provide coaching and mentoring to help you get the most out of Jira Work Management. We can help you tailor Jira Work Management templates to your business needs and assist with creating status reports and dashboards.

We offer coaching and mentoring packages via our Experts on Demand subscription-based service, enabling you to get the support you need *when* you need it. Ask to speak to an expert to find out how we can help you get the most out of your investment in Jira Work Management.