

ULTIMATE NINJA GUIDE TO

ATLASSIÄÑ TOOLS

Clearvision



WELCOME TO **THE ULTIMATE NINJA GUIDE TO ATLASSIAN TOOLS**

**JIRA SOFTWARE, JIRA SERVICE MANAGEMENT, JIRA WORK
MANAGEMENT, AND CONFLUENCE.**



Jira

If you've joined the tens of thousands of people around the world using Jira, then you're already off to a strong start in improving your collaboration efforts and advancing your project management capabilities. This guide will provide you with the basics for prioritising, assigning, tracking, reporting, and auditing issues (tickets).

Jira Service Management

Get started with Jira Service Management, the tool that's gone from being used primarily by IT teams to growing in popularity amongst business departments, e.g. HR, Finance, and Legal – where requests are frequent and often dealt with via email.

Jira Work Management

Learn how to configure issue types and screens in Jira Work Management, get workflows right, as well as dashboards and reporting, automate tasks, work with tickets, and manage both incoming requests from other teams as well as your own proactive work.

Confluence

Use this guide to get off to a good start with the wiki and collaboration platform known as Confluence that allows you to create, store, manage, and share knowledge across departments and the entire organisation.

This guide was written by Atlassian specialists at Clearvision, an award-winning Atlassian Platinum Solution Partner.

ClearVision



ATLASSIAN CLOUD

03 **INTRODUCTION**

04 **GETTING STARTED**

05 **SEARCHING**

06 **PROJECTS**

07 **ADVANCED LEARNING**



INTRODUCTION

This white paper has one simple objective — to provide you with guidance on getting started with Jira in under 30 minutes!

Atlassian's famed workflow management application, Jira, gives users the ability to prioritise, assign, track, report and audit 'issues' (or tickets as they are otherwise known).

Millions of organisations choose Jira to improve their collaboration efforts and advance their project management capabilities. As an Atlassian Platinum Solution Partner, Clearvision has conducted a number of Jira training courses for businesses of all sizes.



GETTING STARTED

While this white paper includes everything intended to help the new user get started, a Jira training course is still recommended to ensure that all of the features and functionalities of the application are fully utilised.

Before we explore the more in-depth courses, let's cover the basics.

STEP 1: SETTING UP YOUR DASHBOARD

The first thing you'll notice when you log in to Jira is your Dashboard. This is customisable and worth taking a few minutes to make your own.

In addition to being able to change the layout, you'll notice the '+Add Gadget' button. Atlassian provides a number of Gadgets to choose from, allowing information to be displayed in a way that you prefer. Users have the option to download more if they wish to.

Gadgets bring a range of customisations to Jira, with the 'Assigned to me' Gadget being a popular one for displaying unresolved tickets that have been assigned to you. Another popular Gadget is 'Pie Chart' — simply customised to display issue types, projects and more.

Note: You can edit, minimise or remove a Gadget by clicking on the top right of the box.

STEP 2: CREATING AND ASSIGNING ISSUES

Firstly, what is an 'issue'? An issue is basically a task — something that needs to be done. Businesses use Jira in different ways but generally, issues are included as part of a wider project and are assigned a level of priority.

There are a number of fields we could delve into but we've only got 30 minutes so let's focus on the most important ones!

o **Issue type:** A simple way of breaking down what type of task it is, e.g. bug, improvement or new feature.

o **Priority:** How important is the ticket? Is it blocking progress or is it cosmetic? You'll be able to categorise this here. Issues can be voted on for collectively deciding on the importance of a task.

o **Status:** How the ticket is progressing. This allows the issue owner (often management) to track progress. Tickets usually run through a 'workflow' set up by the admin and should be discussed to avoid error (more on this below).

o **Resolution:** How you let the assignee know when a ticket has been completed. Your admin will be able to tell you what resolutions mean in your workflow.

o **Watching an issue:** When a ticket has been created and assigned, you'll automatically start 'watching' it. This means that whenever work is carried out on the ticket you will receive a notification. Additional watchers can be added to a ticket, and if for some reason you don't want to receive notifications about when a specific ticket has been transitioned, i.e. when work has been logged or when a comment has been added, you can modify the 'watching' option within your profile settings. Again, those involved can vote on issues to collectively decide on the importance of a task.

BLURRED VISION

If you're having trouble viewing or adding 'watchers' or 'voters', it might be worth checking out your permissions.

Permissions are set by the Jira admin at the project and global level, so if you are unable to watch an issue, it's worth speaking to the admin.



SEARCHING

Now you know how to create and assign tickets, let's explore how to find them.

The search function in Jira is powerful, but at an elementary level, you only really need to understand 'quick' and 'basic' search.

QUICK SEARCH

This is the search box in the top right-hand side of your screen. It allows you to jump straight to an issue, complete a 'smart query' and more.

It's worth noting that issues in Jira are assigned 'keys' (e.g. ABC-123) and if you search for this and hit enter you'll be taken straight to that issue.

The more you become familiar with Jira, the more you'll learn 'smart querying' — a series of search terms that enable you to filter results. For example, a search for "my" will find issues that have been assigned to you.

STANDARD SEARCH

Select either Issues or Filters from the menu, and 'search for issues' or 'Advanced Issue Search'. The search function works similarly to 'quick search' but, with the 'basic search', you get a series of fields to filter results.

Tick the field you want or, if you cannot see it, simply search for it. This is a great way to find a ticket within a project or tickets assigned to you. The page will auto-update as you go along.

ADVANCED SEARCHING

Clicking either 'Advanced' or 'Switch to JQL' allows you to use Jira Query Language (JQL) to dig deeper. For more information regarding this, please enquire about our advanced training course.

For the purposes of this white paper, it is assumed that you already have had a project assigned to you by your administrator. The project page is often the space in which the majority of Jira users spend their time.

PROJECTS



From the project Dashboard, you'll be able to view issues, Releases and Components, along with anything else relating to that particular project.

Jira Reports reveal statistics for specific individuals, projects, versions, or other fields within issues. Similar to the Gadgets displaying information on your Dashboard, Reports display relevant information on the Report screen.

There are a number of Reports that are out of the box including Time Sheets, Workload Pie Charts, and so on. These can all be created through the project screen by selecting the relevant criteria.

If you cannot find what you are looking for, you should visit the Atlassian Marketplace or speak to an expert at Clearvision.

ADVANCED LEARNING

From advanced searching to creating and managing projects, there's a lot to learn about Jira. As outlined at the beginning of this white paper, you'll want to consider an advanced course to expand on your knowledge. Courses are available at admin level for new and experienced users.

WHAT'S INCLUDED IN ADVANCED COURSES WITH CLEARVISION?

Jira has powerful issue and bug tracking capabilities which we urge you to take advantage of.

Included in our advanced courses:

AGILE WITH JIRA SOFTWARE ESSENTIALS (AVAILABLE FOR CLOUD AND SERVER)

This training course is designed for those who've acquired knowledge from this white paper but who would like to expand on their learnings through a more hands-on approach.

ADVANCED ROADMAPS (CLOUD AND SERVER)

This course is ideal for new users of Jira Portfolio, especially for those requiring the ability to plan the delivery of software projects run by Agile teams.

JIRA SERVICE MANAGEMENT ESSENTIALS (AVAILABLE FOR CLOUD AND SERVER)

This course covers Atlassian Jira concepts and will equip you with everything you need to raise service requests while using Jira to manage Service Desk queues, SLAs and customer satisfaction.

JIRA SOFTWARE ADMINISTRATION (AVAILABLE FOR CLOUD AND SERVER)

This course is ideal for new Jira Administrators who have the responsibility of defining projects and configurations for use amongst Agile teams.

JIRA PROJECT ADMINISTRATION (CLOUD AND SERVER)

Based on the Atlassian certification ACP-600, by the end of this course, attendees will have a solid understanding of both the configurations in their control and the ramifications of requesting changes from an application administrator. Attendees will also learn the best practices of shared schemes, permissions and

project configurations.

All of our training courses are customisable, allowing you to pick and choose modules from other courses which can be tailored and developed in a way that suits your specific needs.

For a real-life example of our Jira training, read our [case study on how we helped the team at Vodafone](#) improve their collaboration efforts with Jira.

For more information, please visit: www.clearvision-cm.com/.



Clear*vision*



⚡ Jira Service Management

03	INTRODUCTION
04	GETTING STARTED
06	CONFIGURING YOUR PROJECT
08	GETTING SLAS SORTED
09	QUEUES AND REPORTING
10	AUTOMATING SIMPLER TASKS
12	KNOWLEDGE BASE
14	WORKING WITH TICKETS
16	ADVANCED LEARNING



CONTENTS

INTRODUCTION

This guide is designed to give new users of Jira Service Management (JSM) a headstart.

JSM is primarily used by IT teams, but it is becoming more popular among business teams, e.g. HR, Finance, and Legal, where requests are frequent and often dealt with over email.

Whilst this guide aims to help new users get started, a JSM training course is highly recommended.



GETTING STARTED

To make the most of JSM projects, there are a few things to consider...

First, decide on the use and 'customers'. Customers can be anything from external users assisted by an IT Support team to internal users within a Legal or HR department. Next, decide how you want your customers to interact with the team to determine who has access to the project and the available methods. Then, review the types of requests and the information required to do the job. The best course of action is to look at previous requests and build a catalogue, which is effectively an open list of work customers can browse and choose from. A well-defined request catalogue helps:

- Reduce the load by identifying requests that take the most resources, either by automating laborious tasks or improving documentation.
- Collect all of the necessary information on a request form to complete a job. If it's a new user/starter, a description box won't help, instead, consider creating specific fields to capture important info such as the start date, line manager, team, etc.
- Automate task opportunities in the future.

Kick this off with a spreadsheet — create a table like the one shown below to collect all of the information. For details like possible applications or departments, provide a list:

REQUEST NAME	INFORMATION NEEDED/LIKED TO COMPLETE THE WORK	MANDATORY FIELD
Getting error when accessing a system	Summary	Yes
	Description	Yes
	What System? <ul style="list-style-type: none">• Jira• Confluence• Bitbucket• StatusPage• Opsgenie	Yes
	Error code	No
	Attachment	No
Get access to a system	What system?	Yes
	Justification	Yes
	Line Manager	Yes

Now you can create your first JSM project! Start by going into Jira, click 'projects' at the top, and 'create project'. You will then be prompted for the 'type' of project. *Note: You may need an Admin to do this for you.*



Templates are a great starting point; create basic workflows and insert common requests for the project type. *Tip: Click on each arrow for a breakdown of the template features.*

Project templates

Jira Service Management

Deliver great service experiences fast. Empower every team, from IT to HR to legal, to set up a service desk quickly and continuously adapt at scale with our service



IT service management LAST CREATED

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



General service management

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



Customer service management

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



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.



05

CONFIGURING YOUR PROJECT

Once you've created the project, you can configure the settings.

The following changes are made in the 'Project Admin'. Speak to a System Admin for assistance.

CUSTOMER PERMISSIONS

To configure customer permissions, go into the project and select 'project settings' in the bottom left-hand corner. Click 'customer permissions' towards the top to assign who can raise tickets for the project and who can share them. If used, 'Organizations' provides a collection of customers visibility over tickets.

CHANNELS

Channels are options that connect customers. Choose from 'email', 'customer portal', 'widget', or a combination.

EMAIL

To provide customers with an email to raise requests, head to the 'email request' tab halfway down 'project settings'.

On Cloud, Atlassian provides a default email, but if you'd rather use your own, choose the appropriate button at the bottom of the page and follow the on-screen instructions.

Once connected, you can link to a request type. To do this, click '...' towards the top on the right-hand side and select 'configure email request types'. Then, select the request type you wish to use and remember to save it.

WIDGETS

If you'd like quick access on your website service desk or another location, you can use widgets. To configure this, select the 'widget' tab under 'project settings'. Using toggles, colour picker, and text boxes, configure the widget how you like and save and copy the JavaScript code to the appropriate space. For the widget to work, your product must allow non-logged-in users to raise requests.

CUSTOMER PORTAL

Your portal is set up automatically when you make a JSM project. It is the primary way for customers to interact and allows information to be collected. Under the 'portal settings' tab, configure colours and define permissions, i.e. who can add announcement banners.



PORTAL REQUESTS

Once you've set up your portal, configure the different requests previously defined. Create custom fields for additional data to be captured. If you're not an Admin, speak to the relevant person about getting custom fields made and added to the screens for you.

Once all custom fields and request types have been created, group them so that the portal remains clean and user-friendly. *Note: You are limited to just two levels — 'group' and 'request' forms, so think wisely about what makes sense to your customers.*



GETTING SLAS SORTED

A service-level agreement (SLA) is a documented contract between a service provider and its customers outlining services, standards of practice, and deadlines. In short, SLAs are commitments. *Reminder: Customers can be external or internal users.*

In Jira terms, services are request forms, standards are Agent practices, i.e. how they will interact, the processes, etc. Deadlines are the SLA clocks set in Jira, for example, triage and resolution times. To create SLA clocks, head to 'project settings' and click 'SLAs'. *Note: Some SLAs will be in the project by default, but you can edit or create new ones if preferred.*

Each SLA has four parts — 'goals', 'start parameter', 'finish parameter', and optional 'pause parameters'.

Goals

Issues will be checked against this list, top to bottom, and assigned a time goal based on the first matching JQL statement.

Time Goal	Calendar	Issues to display (in JQL)	
4h	Sample 9-5 Calendar	"Ticket category" = Incidents	X
8h	Sample 9-5 Calendar	"Ticket category" = "Service requests"	X
No target	Sample 9-5 Calendar	All remaining issues	

+

Conditions

Time will be measured between the start and stop conditions below.

Start counting time when...

Issue Created

Resolution: Cleared

Add Condition

Pause counting time during...

+

Finish counting time when...

Resolution: Set

Add Condition

When creating a goal, set the time and clock you wish it to run on, and use Jira Query Language (JQL) to show the issues that will use that goal. Next, use the start, finish, and pause parameters to decide when the clock runs. To create additional calendars, click the 'calendar' icon towards the top on the right-hand side. Give it a name and default time zone to run against, and populate each day with start and end times. You can also insert holidays, if known, to show the availability of your team. *Note: Compulsary holidays do not need editing, however, moved dates must be adjusted.*



QUEUES AND REPORTING

Queues are a way of providing a focus on tickets as they reveal what's waiting to be triaged, who is waiting on support, etc. Queues, like SLAs, are built using JQL.

To build queues, go into the project, click 'queues' at the top, and 'manage queues'. When the pop-up appears, select 'create a new queue', give it a name, and start building!

You can use buttons to help build your query, or you can select 'switch to JQL' to build it from scratch. Lastly, choose the columns you wish to show on the queue. You have access to every custom field available in the project and are not limited by the number of columns you can have, but bear in mind, the purpose is to provide Agents with an understanding of the ticket before they go into it.

Alongside queues, Agents and Service Managers can use JQL to create in-depth reports. To do so, click 'reports' when in the project.

Jira will generate tons of different reports by default, such as created vs resolved, time to resolution, SLA success rate, etc. You can also create your own. To do this, click 'new report' in the bottom left, give the report a name, and then 'add series'.

Each series is made up of a data point, i.e where Jira collects issues for the report, its name, colour, and the JQL behind it. *Note: You can add as many series as required to the report.*

You can continue using normal Jira filters on dashboards alongside project reports. For additional dashboard gadgets that display information in a specific way, *Custom Charts for Jira* by *Old Street Solutions* is highly recommended and comes with a selection of styles.



AUTOMATING SIMPLER TASKS

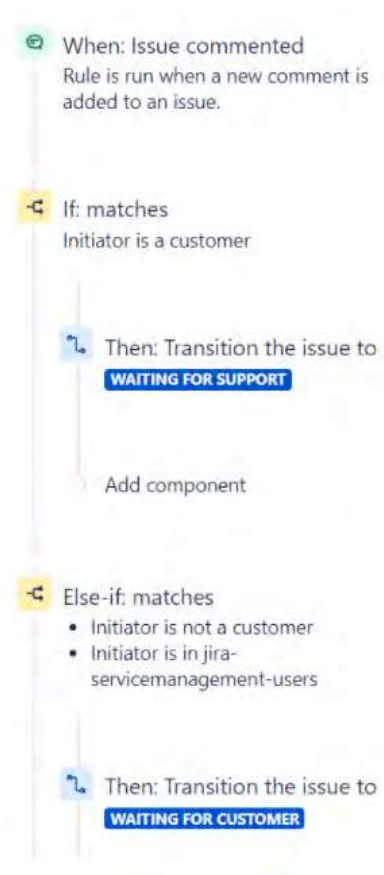
Tasks such as moving tickets to wait for the customer, looking for replies, alerting resolver groups, moving tickets to support, or adding issue data based on form details, can all be automated. *Automation for Jira*, formerly owned by *Code Barrel*, offers Project Admins no-code automation rules that have all the power without the technical debt.

Each rule requires a trigger and at least one action. Typical trigger points are when issues are created, commented on or transitioned, and where fields are edited or run on a schedule. Actions are creating, editing, commenting or transitioning issues. You can send notifications to external chat tools such as *Teams* or *Slack* and even external webhooks as actions.

TRANSITION ON COMMENTS

Whenever anyone comments on a ticket, the status should reflect its current state by default.

To begin, you need the trigger point to be 'issue commented'. Next, apply some logic. As you are looking for two opportunities, apply a condition, in particular, the 'if else' condition. Identify whether the user is an external customer using the 'user condition' option, and if they are, the action is to transition the issue to 'wait for support'. If they are not a customer, use the user condition option again to see if they are a part of the Jira-servicemanagement-user group. Finally, transition the issue to 'wait for the customer'. If done correctly, the rule should look something like this...



AUTO CLOSE

If you're giving customers the ability to reopen tickets after they have been resolved, but you would like them permanently closed after so many days, set up 'pseudo-SLAs'. Using the SLA feature, set clocks to run, and use them as trigger points for the automation rules to kick in. For this, create an SLA that starts when a ticket is resolved and ends when it enters the closed status.

Remember to set a goal on tickets. Using the automation rule, set the trigger to 'SLA breached'. Specify the SLA, and select when the timer is breached, then transition the ticket to closed. Use this opportunity to notify the customer by commenting on the issue.

🕒 When: SLA threshold breached
Time to close after resolution breached

🔄 Then: Transition the issue to
CLOSED

💬 And: Add comment to issue
Hi {{issue.reporter}}, We are now closing this ticket as it has been resolved for three days. If your issue is still persisting

SLA BREACHING

To stay on top of SLAs, set rules to notify you when a ticket is close to breaching or has breached one of the clocks so that you can deal with it promptly. For rules such as this, the trigger point is an 'SLA breach'. Select the rule and time you wish to be notified and choose an action, for example, 'send a chat notification to *Teams* or *Slack*, and this will add a comment to the ticket or direct @ mention to users.

The hardest part of any automation is knowing where to start. *Jira Automation* comes with a diverse and deep template library. If you are struggling to start a rule, look in the library and adapt an existing one to meet your needs.

🕒 When: SLA threshold breached
Time to resolution will breach in the next 1 hour

💬 Then: Add comment to issue
TEAM, This ticket is about to breach resolution SLA. Please look into this as soon as possible.



KNOWLEDGE BASE


A knowledge base article contains information about a product or service either in the form of a user guide or to solve common problems. Typically, a service desk will fill a knowledge base with anything that can assist the customer to deflect tickets. This is often product release notes, Admin and user guides, how-to articles, and troubleshooting articles.

Knowledge bases empower customers by allowing them to fix their own issues. If articles are well written, customers often prefer to fix requests themselves over raising a ticket and waiting for a response. Knowledge base articles can be shown on the portal to customers without the need for a license. When a customer types a request, JSM automatically filters the correct knowledge base articles that could be used to help deflect the ticket.

Summary*

test


Suggested articles

 **test project**
from test project


Description

If you have both Confluence and JSM as Cloud editions, the project will automatically create a linked space for you. To change the space used or to add additional spaces, go to 'project settings' and select 'knowledge base'. Once connected, you can decide whether you want it to be public or specifically for Agents.

Space



[Create space](#) [Link space](#)

<input type="checkbox"/>	Space	Viewing permissions		
<input type="checkbox"/>	test project	Private ▼	Unlink	Settings 

Control article suggestions

Set up article suggestions that can help your customers as they fill in a request form. Use labels to limit which articles are shown in each form.



To filter articles, select specific labels against request types and ticket deflection.

Control article suggestions

Set up article suggestions that can help your customers as they fill in a request form in each form.

Request form	Allow suggestions	Only show articles
Get IT help	<input checked="" type="checkbox"/>	atlassian x
Fix an account problem	<input checked="" type="checkbox"/>	

To see how successful an article is, every JSM project comes with two built-in. Head to 'reports', 'requests deflected', and 'requests resolved'. You can also see how often and when an article was last used in a project under the 'knowledge base' tab.

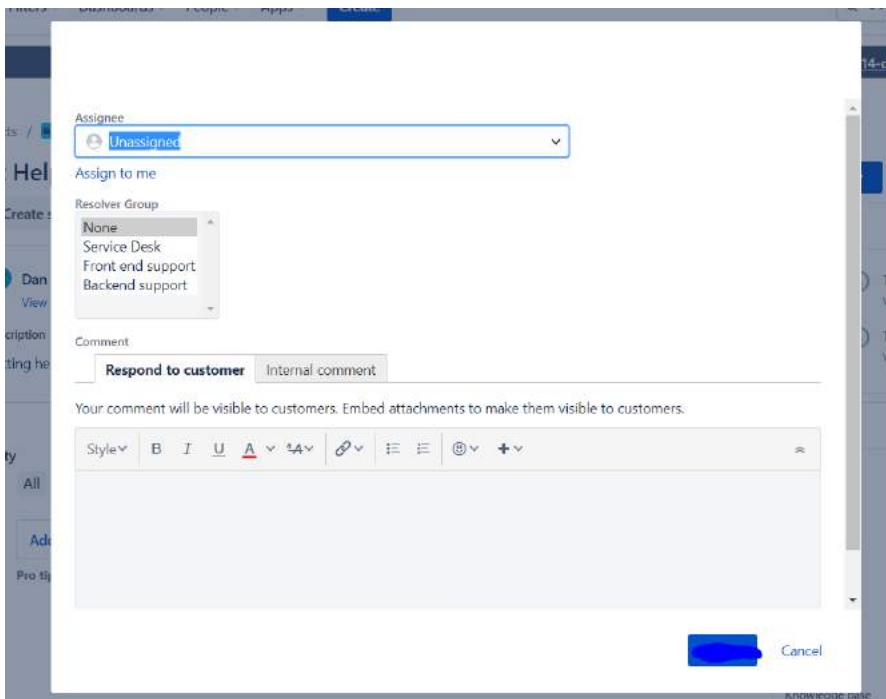
KEY POINTS

- Labelling pages is not only best practice in Confluence, but it helps get articles onto a service portal.
- To hide internal pages, use 'page restrictions'. If you're only allowing certain requests to use specific labels, a page can still be found via the 'help center'.
- You can have multiple knowledge bases linked to a single portal. This allows knowledge management by separate teams.



WORKING WITH TICKETS

If your service desk has multiple resolver groups, an easy way to manage tickets for teams is to create a multi-select custom field. This will allow you to make queues for each team so that they can find their tickets at a glance. To do this, select 'resolver group' in the drop-down menu. If you know certain request types on the portal will be assigned to particular resolver groups, don't forget to add the field to the request type and to hide it with the pre-set value. Finally, to move tickets between teams, either change the value in the resolver group field or create a looped transition.



It's common for tickets to be escalated when additional support is required from Managers. While every company's escalation policy differs, there is a simple way of having Jira show escalated tickets — update workflows to include an escalated status. By using a status reflected on the customer portal, customers are kept informed on the progress of their requests. Typically, this status can only be transitioned to 'from waiting for support' and will usually return to 'waiting for support' or 'resolved'. This simple workflow change enables escalations to be time stamped on a ticket for future analysis.

For teams to know what tickets have been escalated, create a queue that looks for "status = escalated".

Filter by

This queue is already filtered by: project = "test project"

Type: All ▾ Escalated ▾ Unresolved ▾ Label: All ▾ + More

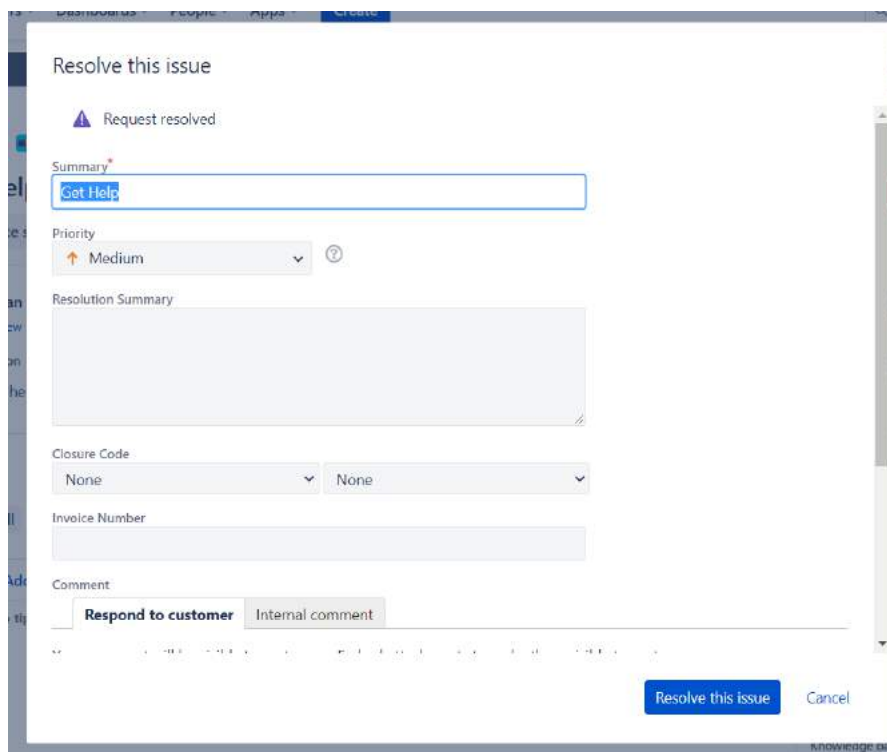
Columns

Issue Type × Key × Summary × Reporter × Assignee × Status × Created ×



Resolving tickets is a great feeling, but learning from them benefits everyone. Adding extra fields when resolving a ticket, enables teams to review and understand previous requests within seconds. 'Resolution summaries' are a great way to provide future Agents with an understanding of what a ticket is and how best to resolve it. It's also a great opportunity to look into 'closure codes'. Closure codes provide Managers with an overview of how a ticket was resolved so that if there was a technical problem, future occurrences can be mitigated. To set this up, create two new custom fields; the first should be resolution summary (a multi-line text field is best). The second should be for closure codes (single select or cascade select - depending on how in-depth you need closure codes to be).

Once done, create a new 'resolve ticket screen' and add the fields. Lastly, add your screen to the resolve transition on the workflow.

A screenshot of a 'Resolve this issue' screen in a ticketing system. The screen has a title bar with 'Resolve this issue' and a 'Create' button. Below the title bar, there is a status indicator 'Request resolved' with a warning icon. The main form area contains several fields: a 'Summary' field with a 'Get Help' button, a 'Priority' dropdown menu set to 'Medium', a 'Resolution Summary' multi-line text area, a 'Closure Code' dropdown menu set to 'None', an 'Invoice Number' text field, and a 'Comment' section with two tabs: 'Respond to customer' (active) and 'Internal comment'. At the bottom right, there are two buttons: 'Resolve this issue' and 'Cancel'. The bottom of the screen shows a 'knowledge base' link.

Triaging tickets to completion allows Agents to understand them in their entirety for the best course of action. For all the details, check the summary and description of the request/incident and determine whether the reporter has logged the ticket correctly. Has the correct request type been chosen? Has it been logged as an incident? Has it got the correct priority based on the impact and urgency? Has any of the custom field data been populated/need to be populated on the ticket? Have the correct values been set?

While triaging correctly is time-consuming, it reduces ticket resolution times as Agents know what to look for. It also helps Managers understand where best to place resources — if more incidents are logged, Managers can allocate resources to quickly investigate and mitigate any challenges before more tickets are created.



ADVANCED LEARNING

Between advanced searching and creating and managing projects, there's a lot to learn about Jira. As outlined at the start of this white paper, you'll want to consider an advanced course to expand your understanding. Courses are available at the Admin level for new and experienced users.

WHAT'S INCLUDED IN CLEARVISION'S ADVANCED COURSES?

Jira is a powerful ticketing system with many features including 'asset management' and 'event management'. We urge you to take advantage of one of our advanced courses as listed below.

JIRA SERVICE DESK ESSENTIALS (AVAILABLE FOR SERVER, DATA CENTER, AND CLOUD)

This course covers Atlassian Jira concepts and will equip you with everything you need to raise service requests, manage service desk queues, SLAs, and customer satisfaction levels.

JIRA SOFTWARE/SERVICE MANAGEMENT ADMINISTRATION (AVAILABLE FOR SERVER, DATA CENTER, AND CLOUD)

This course is ideal for new Jira Administrators who have the responsibility of defining projects and configurations in agile teams.

JIRA PROJECT ADMINISTRATION (SERVER AND DATA CENTER)

Based on the Atlassian certification ACP-600, attendees will gain a solid understanding of both the configurations in their control and the ramifications of requesting changes from an Application Administrator. Attendees will learn best practices of shared schemes, permissions, and project configurations.

All of our training is customisable, meaning you can pick and choose modules from other courses, and we'll tailor and develop them in a way that suits you.

JIRA MENTORING (SERVER, DATA CENTER, AND CLOUD)

This is mentoring on a one-on-one basis with a certified Atlassian Solution Architect.

Okay you will have to add the line at the end because I don't want to mess up your design. Please paste this at the very end of the paper: For a visual overview of Jira Service Management, [watch our tour](#).



Clear✓vision



NINJA

GUIDE TO

✓ Jira Work Management

- 03 INTRODUCTION**
- 04 GETTING STARTED**
- 06 CONFIGURING ISSUE TYPES AND SCREENS**
- 08 GETTING WORKFLOWS RIGHT**
- 09 DASHBOARDS AND REPORTING**
- 11 AUTOMATING EASY TASKS**
- 13 WORKING WITH THE TICKETS**
- 15 ADVANCED LEARNING**



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/PRE-FERRED TO COMPLETE THE WORK	MANDATORY FIELD
Task	Summary	Yes
	Description	Yes
	Due date	Yes
	Department: <ul style="list-style-type: none">• Sales• Marketing• IT• Recruitment	No
	Attachment	No
Request for new role	Summary	Yes
	Description	Yes
	Line Manager	Yes
	Department	
	Salary	
	Job description	

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.



Jira Service Management

Deliver great service experiences fast. Empower every team, from IT to HR to legal, to set up a service desk quickly and continuously adapt at scale with our service



IT service management **LAST CREATED**

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



General service management

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



Customer service management

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



HR service management

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



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 statuses 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.

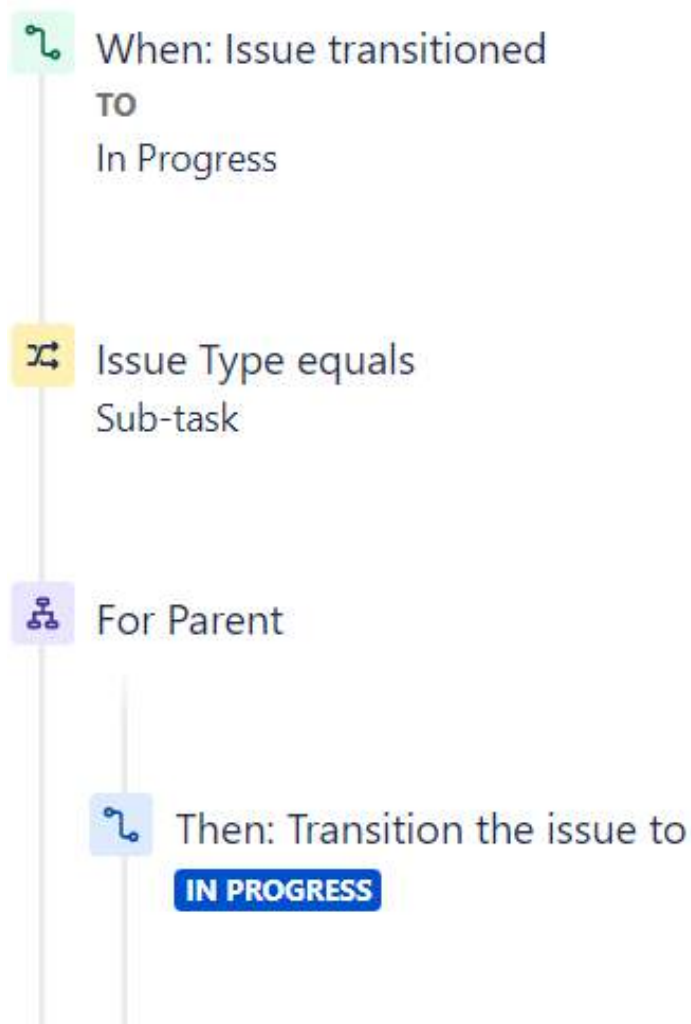
Automation for Jira offers Project Admins no-code automation rules that reduce the technical debt whilst providing the power.

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.

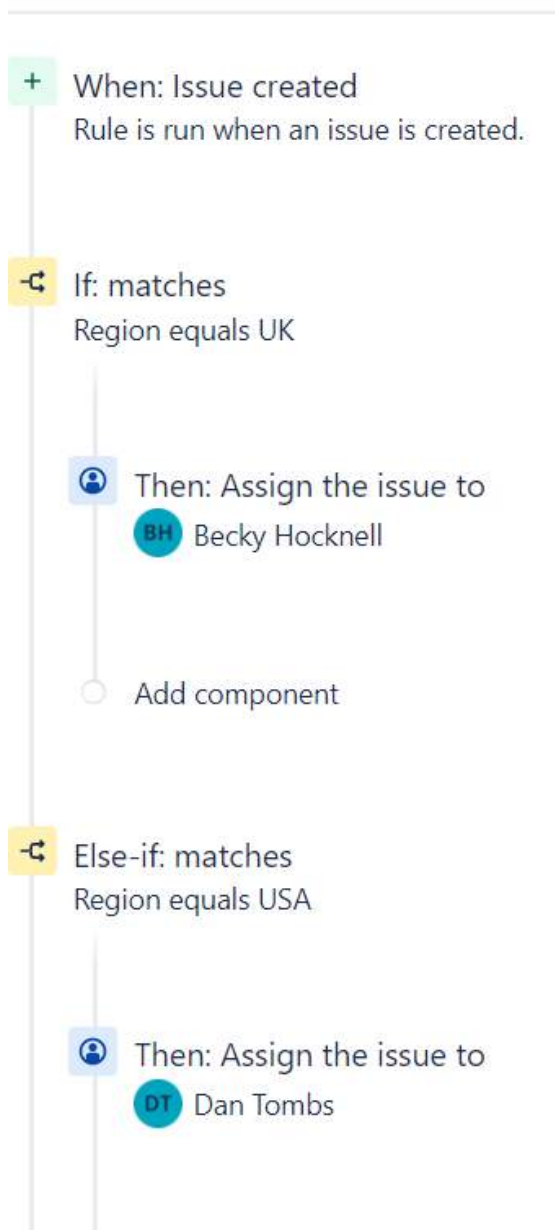
When a subtask is created (moved to 'In Progress') the automation rule will update the parent to move to 'In Progress' as well. To start this rule, the trigger point will be 'issue transitioned', then you can place a quick condition to only allow the rule to continue if the issue is a sub-task. Next,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

List 1 filter applied

Type	# Key	Summary	Status	Assignee	Due date	Priority	
EX	EX-1	Laptop	PURCHASED			High	20
EX	EX-2	New phone for work	PURCHASED		30 Aug 2021	High	20
EX	EX-3	Internet	PURCHASED		7 Sept 2021	High	20
EX	EX-4	Electricity	PURCHASED	Unassigned	5 Sept 2021	High	20
EX	EX-5	Microsoft Office licenses	PURCHASED		5 Sept 2021	High	20
EX	EX-6	Atlassian & apps licenses	REJECTED		30 Sept 2021	High	20
EX	EX-7	Ipad case	PURCHASED			High	20
EX	EX-8	Printer cartridges	PURCHASED			High	20
EX	EX-9	Paper and Envelopes	PURCHASED			High	20

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.

Board

Q Assigned to me Due this week

APPLICATIONS 0 SCREENING 0 INTERVIEWING 0 INTERVIEW DEBRIEF 0 OFFER DISCUSSIONS 0 ACCEPTED 0 REJECTED 0

+ Create new issue

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.

✓ All changes saved Share Preview ⓘ

Project Expenses - Form

Add help text and instructions to fill in this form

Summary *

Answer will be written here

Description

Answer will be written here

Vendor

Answer will be written here

Annual / One Time

Answer will be selected from dropdown

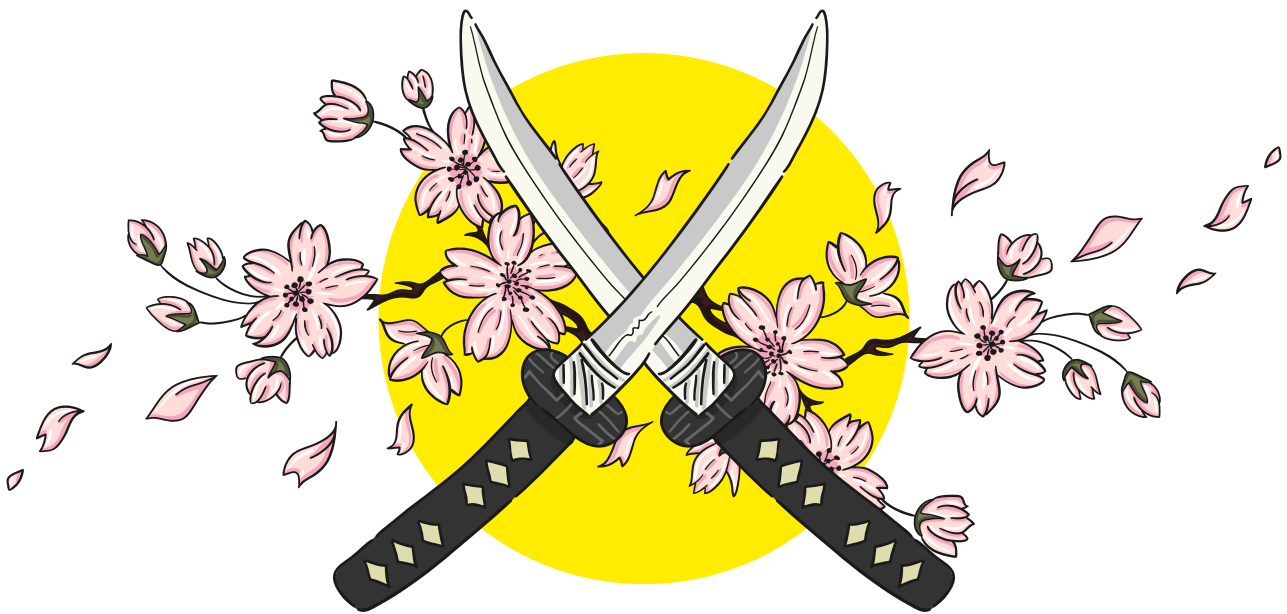
Drag fields to build the form

- Priority
- Start date

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.



Clear✓vision



NINJA

GUIDE TO

X Confluence

03	INTRODUCTION
04	GETTING STARTED
05	SEARCHING AND LABELLING
07	CREATING AND EDITING TEMPLATES
08	MACROS
10	THE ATlassian MARKETPLACE
10	PREMIUM CONTENT
12	AUTOMATIONS IN CONFLUENCE
12	ADVANCED LEARNING



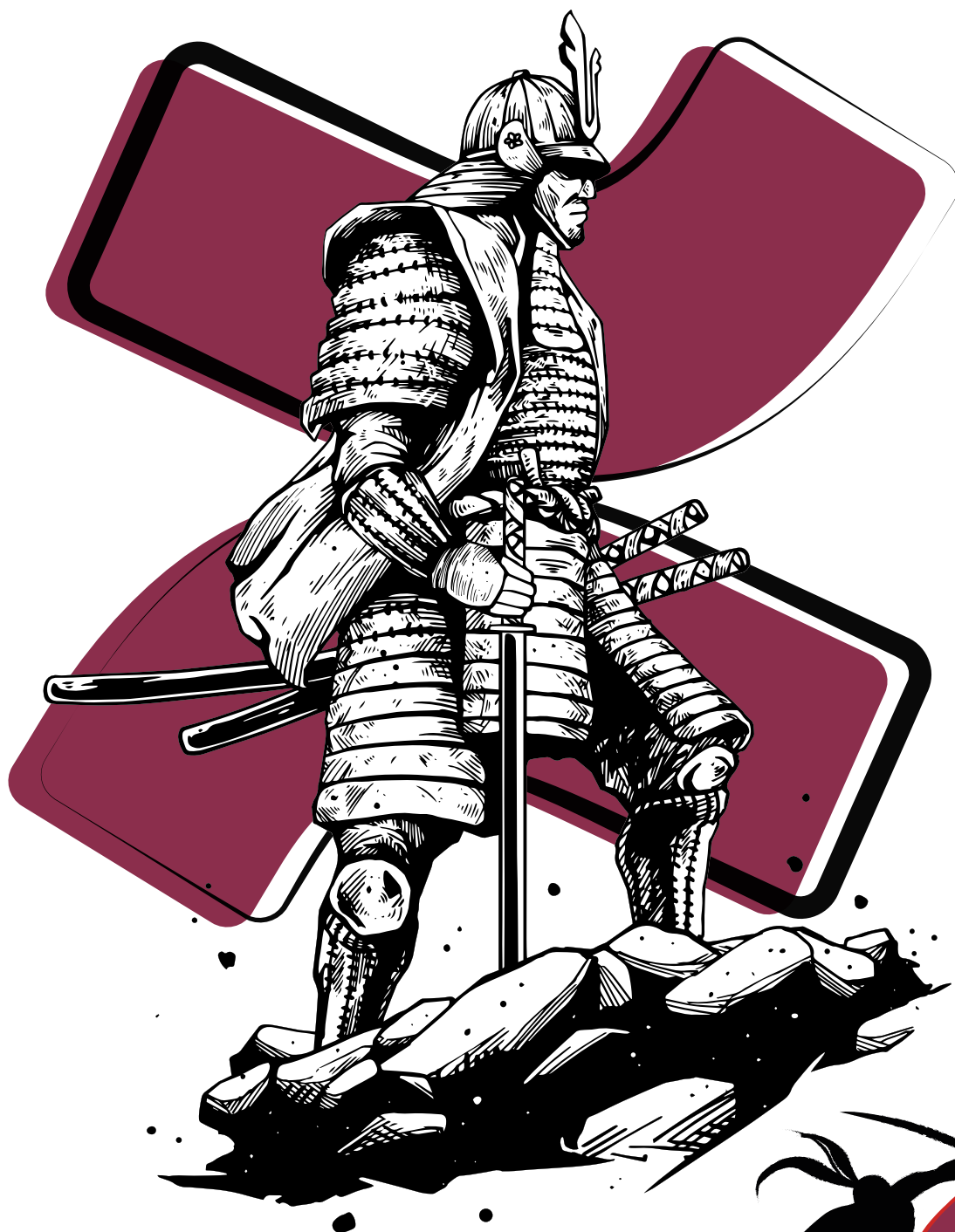
CONTENTS

INTRODUCTION

The following guide is designed to aid users of [Confluence](#).

Confluence is a wiki and collaboration platform that allows you to create, store, manage and share knowledge across departments and the entire organisation. Atlassian users benefit from integrations with the rest of the suite including Jira for complete transparency.

While this guide includes everything intended to help the new user get started, a training course is highly recommended to ensure all of its features are realised.



GETTING STARTED

The architecture of Confluence is fairly easy to understand and consists of two major levels, spaces and pages. Spaces are effectively buckets of information and the typical themes of them are by department or product. Spaces provide an easy way of keeping everything related to one topic together. You are not limited in terms of how many spaces and themes you can have, but it is better to remove doubt by making it clear to end users where information should go.

All spaces are equal in their own right, simply meaning, you cannot put one inside another (like a nested model). There are a few types of spaces you can make out of the box. These fall under knowledge bases, team spaces, personal (great for keeping meeting and private notes), and a blank space. On choosing the most appropriate, Confluence automatically uses a blueprint to create your space. Blueprints are a great place to start, but of course, like the rest of Confluence, the choice is yours, and you can change everything in it to suit you, your team's, and the company's requirements.

Space structure is important and can be organised using pages, i.e. blog posts, documentation, how-to guides, etc. You'll want to make it as easy as possible for users to navigate and find information, all while making it efficient for your team to create and manage knowledge within the space.

Unlike spaces, you can create a page hierarchy where the tree can be used to represent subtopics, but be mindful of the fact page trees can lead to confusion. A Confluence space is not like your computer's folder structure. All pages are equal, so regardless of where the page sits in the hierarchy, it is designed to be full of its own content – searchable, relevant, and as useful as all of those above and below it. It is best to keep the structure as simple as possible, so try to keep it to no more than three or four sub levels.

Confluence ships with hundreds of unique templates built for various requirements. When creating a page, there is a template library on the right side. Atlassian worked with industry-leading vendors to create standardised and efficient page templates to improve collaboration. Using the searching and filtering options, find the template that suits your needs, select and click 'use'. The page will then transform into the template, allowing you to start using it. If you cannot find a template that works, or you have specific ways of working, we cover creating your own further down.

To create a space, you need to have the 'create space' global permission. Your Admins can check to see whether you have this or they can help you create it. Once you have the permission, click the navigation bar and 'create space', provide a name and a meaningful key and create away!



SEARCHING AND LABELLING

One of the powers of Confluence is that your company's knowledge is at your fingertips. For this to work successfully, searching is a top priority. Confluence searching is built on a tiered solution. When a user enters a phrase, Confluence searches every available page for labels, titles, and content. It then prioritises the list of results based on how many times those key points were mentioned on a page. With Confluence choosing labels as its first searching point to match to, it is vital to label your pages with topics.

Labels themselves are system-wide. When you start typing, Confluence searches the entire site for possible matches.

SOMETHING TO CONSIDER

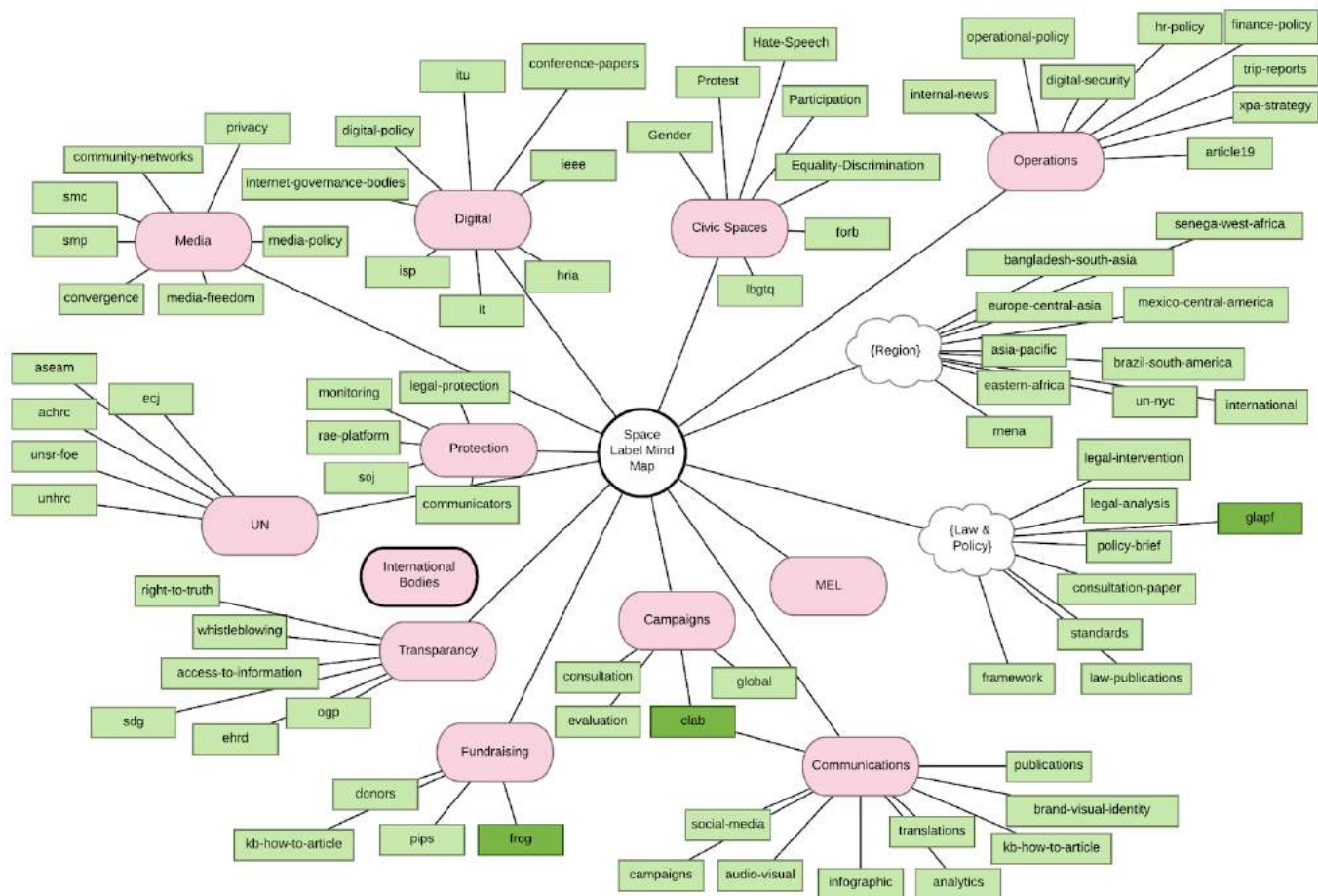
Labels do not work with spaces. If working with multi-word labels, create a standard of '-' or '_' to help.

To add labels to a page, look for the little tag icon when in view mode at the bottom of the page on the right side. When in edit mode, click the ellipsis in the top right corner, then click 'add labels'.

Labels are not only important for search results but in dealing with certain macros. Since labels provide Confluence with another way to group topic-related information, you can use macros, e.g. 'content by label' or the 'labels list' to provide additional functionality to the pages and to easily navigate between content. For example, a user could be looking in a space for an article on user onboarding but not remember the actual title. Using the labels list macro, the user would be able to click on the onboarding label and see all articles where it has been used to find the correct page.

When it comes to labels and getting started, the best way is with a good old fashioned mind map. Mind maps allow team collaboration across different topics. Start with your large chunk work, then all possible sub-topics underneath. Keep going until you have covered all sub-topics. You can use cloud bubbles for particular topics that could sit across multiple areas but are beneficial for searching, etc. Below is an example of a mind map for a legal and legislation department.





PLEASE NOTE:

This is a working document. This diagram should be constantly evolving with you and your team. By constantly evolving this diagram, you can ensure you and your team always have the correct guidance for labelling the structure of your content.

PLEASE NOTE:

The aim of this exercise is not to 'big brother' content creation, but to guide end-users of possible topic labels to add to pages for consistent and accurate search results and navigation.

PLEASE NOTE:

If possible, store the mind map in Confluence, so that it is easy to reach for all users at any time. Using apps like Draw.io or other diagramming tools, you can edit directly from the Confluence page.

When adding to pages, you can then go along the different branches including every bubble you hit as a label. This helps with content appearing in the correct place no matter the level the label is looking at.



CREATING AND EDITING TEMPLATES

There are two types of templates – space and global. Space templates are built and managed and are only available in the chosen space. Global templates are built and managed by Admins but are available in every space by default. Space Admins can disable them in the Space Admin console, but this is by choice.

When creating a page, you will see the template library on the right side of the screen. Atlassian provides hundreds of templates out of the box to help you collaborate better. For searching and filtering options, find the template that suits your needs, and select and click 'use'. The page will then transform into a template. However, you may not always find one that suits your needs, nor is there a template for every situation. To create a global template, head into the Admin Console by clicking the cog in the top right corner. Then click on 'templates and blueprints' on the left side where you can choose to edit an existing default template or create a new one via the 'create new template' button. To create a space template, head into the chosen space, then using the 'space settings' button on the left side, select 'content tools'. There you'll find all default templates, or the ability to create a new one dedicated to that space.

Once you are creating the template, you will recognise the editor. You have the same options in the editor as you do when creating a normal page, however, the two additional assets you have at your disposal are instructional text and variables. The instructional text does exactly as worded. When placed on the page it will provide text, only visible in edit mode, about what a particular section may need to contain. Using instructional text helps guide users to keep standards, uniformity, and efficiency high across the organisation when reviewing and absorbing knowledge in Confluence. Variables are all about collecting specific information reused in the template. Very common use cases can be customer or product names or components on how-to or troubleshooting articles. Variables can come as single-line text, multi-line text or select options. To add instructional text or variables, click the plus icon on the toolbox bar and select the appropriate option.



MACROS

Whilst pages are about content, macros and their additional functionality can help you visualise and promote specific areas of interest so that your users can navigate and absorb the information your page provides. There are over a hundred standard macros that cover a variety of jobs, including page and space navigation, and informative panels that show points of interest like warnings and notes.

The page tree macro is an easy way to showcase the structure found in any space. The default is the current space, however, it can be used to show any.

Notes

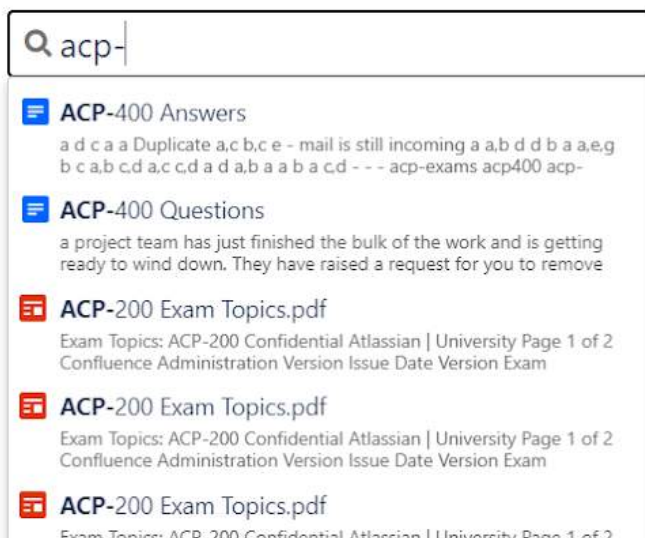
- [Dan Tombs Handover notes](#)
- [F1 Walkthrough](#)
- ▼ [How-to articles](#)
 - [How to review your holiday requests](#)
- [HR Service Desk Holiday Documentation](#)

The children display macro allows you to quickly insert links to any child pages found under a page. The default is the current page but it can be used to show any.

Items held here

- [Git](#)
- [Hosting Knowledge](#)
- [Plain English Course Notes](#)
- [Riada Insights](#)

Live search is an easy way to incorporate the powerful Confluence search compactly. This macro limits search results directly to the current space or other parameters.



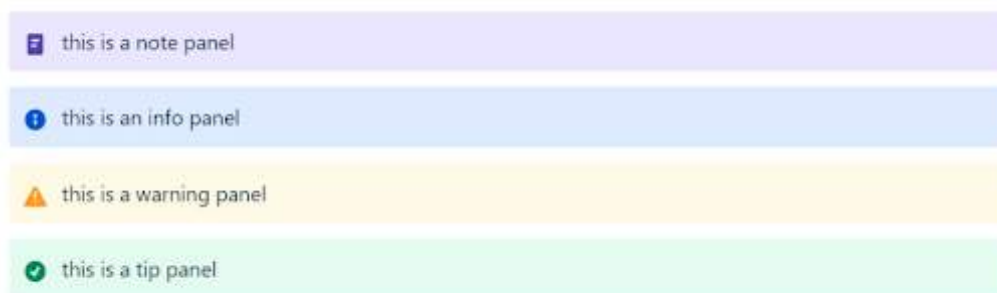
As you build out pages, headings and structure become ever more important. Using the table of contents macro means Confluence will dynamically and automatically build the page navigations based on the headers used, so you can focus more on writing and less on formatting!

Table Of Contents

- [Table Of Contents](#)
 - [ACP-100 based questions](#)
 - [Atlassian Sample Questions \(from the study guide\)](#)
 - [Phil's Questions](#)
 - [ACP-400 questions](#)

Information

The info/warning/note/tip macro is a great way to draw attention to an important piece of information that might otherwise be overlooked. These can especially be useful on policy documents, how-to or troubleshooting guides, or even product documentation.



As you write code, it is important to include snippets in the documentation. To ensure formatting is correct and consistent, use the code block macro.

```
1 This is a Groovy code snippet:
2 def issueLinkManager = ComponentAccessor.getIssueLinkManager()
3
4 if (issue.getIssueType().getName() != "Employee") {
5     def customFieldValue= ""
6     return
7 }
8
9 CustomFieldManager cfMgr = ComponentAccessor.getCustomFieldManager();
10 IssueManager iMgr = ComponentAccessor.getIssueManager();
11 myIssue = iMgr.getIssueObject(issue.id);
12
13 fldBPd = cfMgr.getCustomFieldObjectsByName("Bereavement paid (last 12m)").iterator().next();
14 String relBPd = myIssue.getCustomFieldValue(fldBPd);
15
```



THE ATlassian MARKETPLACE

Confluence, like the rest of the Atlassian suite, was designed to be open and flexible. With the plug and play aspect of the Atlassian Marketplace, you can get additional apps to increase the functionality available from macros. We have chosen a few below that might be of use.

Draw.io

Draw.io is a great diagramming application that provides the ability to get creative and showcase moments where words aren't enough to show your architecture or processes.

Custom charts for Jira in Confluence

This Old Street Solutions app helps bring information from Jira into Confluence for improved reporting and transparency.

PREMIUM CONTENT

Reporting Successful Content

PLEASE NOTE:

The following reporting feature can only be found on the Premium or Enterprise version of Confluence Cloud.

Like any knowledge management system, the most important aspect is keeping information relevant, up to date, and viewable. With Confluence Premium, you can use the built-in reporting capability. Reporting for Confluence provides system, space, page, and attachment level analytics. See who is most active with views and who is contributing the most, both at a space and system level. Find out who has viewed what version of a page at the page level and who has looked at attachments.

With Premium, analytics can be viewed in a few ways. If you want to see the system as a whole, click the 'apps' button on the navigation menu and 'analytics'. You'll then be presented with a view similar to the one shown below. The chart shows views, and pages created and updated. Choose the time and the types of pages and spaces, then compare spaces and how active users are. If you wish to view a specific space, head to it and on the left-hand panel, click 'analytics'. You'll then be presented with a similar view. If you want the analytics of a particular page, next to the title you'll see the 'analytics' button.



Analytics



To change the analytics view permission, you can set this at both a system and space level. As a Confluence Administrator, you have control over who views analytics on your site. This is done by updating the global permissions to allow or deny group access.

1. Browse the Confluence Administration.
2. Click 'security', then 'analytics permissions' in the sidebar.
3. 'Edit', select the groups and click 'save'.

PLEASE NOTE:

- When no restrictions are applied at the global level, new groups added to your site will have access to analytics.
- When at least one group is denied access to analytics, all new groups will be denied by default.
- Anonymous users can't view analytics.

As a Space Administrator, you control who views analytics. Set space permissions by allowing or denying user or group access.

1. Go to the specific space.
2. Click 'space tools', then 'permissions'.
3. Click 'analytics'.
4. Add or remove permissions using the menu provided.



AUTOMATIONS IN CONFLUENCE

No one wants to be pressing buttons or doing meaningless and laborious tasks. Those such as auto-archiving, updating multiple pages with labels, etc., will soon be a thing of the past. Automation within Confluence offers Space and System Admins, with no-code automation, rules that reduce technical debt whilst providing all the power.

In Q3 of 2021, Automation in Confluence was introduced. Based on the Automation for Jira app acquired by Atlassian in 2019, the same IFTTT (IF, This, Then, That) no-code automations will be available in Confluence.

Every rule requires a trigger and at least one action. Typical trigger points are when pages are created, commented on or just on a schedule. Actions include commenting, moving, archiving or deleting. Expect similar notifications to external chat tools like Teams or Slack or even external webhooks that can be sent as actions in the future. Just like the A4J rules, you will also be able to provide conditions to which an automation will be able to fire.

Whilst there is no confirmed date for seeing this feature released in Confluence, its arrival is eagerly awaited. If you are interested in keeping up to date with new releases and improvements to the Confluence Cloud platform, take a look at Atlassian's published [roadmap](#).

ADVANCED LEARNING

From advanced searching to creating and managing projects, there's a lot to learn about Confluence. As outlined at the beginning of this white paper, you'll want to consider an advanced course to expand your knowledge. Courses are available at the admin level for new and experienced users. To ensure you get the most out of your investment in Confluence, consider one of our [training courses](#):

Confluence Essentials (Server, Data Center and Cloud) This course covers Atlassian Confluence concepts and will equip you with everything you need to create and manage knowledge in your company.

Confluence Administration (Server, Data Center and Cloud) This course is ideal for new Confluence administrators responsible for defining and managing spaces and third-party apps.

Jira Essentials (Server, Data Center and Cloud) This course covers Atlassian Jira concepts and will equip you with everything you need to raise service requests while using Jira to manage service desk queues, SLAs, and customer satisfaction.

Jira Administration (Server, Data Center and Cloud) This course is ideal for new Jira administrators who have the responsibility of defining projects and configurations for use in agile teams.

Jira Service Management Project Administration (Server, Data Center and Cloud) This course is ideal for new service team leads and Jira admins who have the responsibility of configuring service projects and service desk portals.



Jira Project Administration (Server and Data Center) Based on the Atlassian certification ACP-600, by the end of this course, attendees will have a solid understanding of both the configurations in their control and the ramifications of requesting changes from an application administrator. Attendees will also learn the best practices of shared schemes, permissions, and project configurations.

All of our training courses are customisable, allowing you to pick and choose modules from other courses which can be tailored and developed in a way that suits your unique requirements.

Mentoring and Coaching (Server, Data Center and Cloud) If you require more specific, one on one training, then sit down with one of our Solution Architects.

