

Jira Administration (Server/Data Center)

1 Day

Classroom, Webinar

This Jira Software Administration training course explores how Atlassian Jira Software can be tailored to meet specific needs with an in depth look at effective administration and configuration.

About this course

Is this course right for me?

This course is ideal for new Jira application administrators and those with the responsibility of defining projects and configurations for use within agile teams.

Objectives and outcomes

By the end of this course, students will understand how Jira can be tailored to meet specific project and processing needs.

Prerequisites

- Completion of the Clearvision 'Agile with Jira Software Essentials' training course (or equivalent) is recommended.
- Access to a laptop
- Internet connection

Modules breakdown

Module 1: Jira concepts overview

Module Sections

1. Introduction
2. Summary of users and groups
3. Projects
4. Project roles
5. Schemes
6. Audit logs

Lab Exercises

1. Create a Jira project and project category
2. Exploring the issue type scheme

Module 2: User and group management

Module Sections

1. Users and the user browser
2. User sign up
3. Groups and the group browser
4. Global permissions

Lab Exercises

1. Public sign up and groups
2. Add new users and create/assign groups

Module 3: Project administration

Module Sections

1. Project administration vs. global administration
2. Versions
3. Components
4. Access control
 - Project roles
 - Permission schemes
 - Issue security schemes

Lab Exercises

1. Create a project role and a permission scheme
2. Set up an issue security scheme

Module 4: The simpler schemes

Module Sections

1. Issue type
 - Issue type schemes
2. Notification
 - Notification schemes
 - Events
3. Priority
 - Priority schemes

Lab Exercises

1. Create a new issue type
2. Create an issue type scheme
3. Create a notification scheme
4. View the default priority scheme

Module 5: Fields

Module Sections

1. Resolutions
2. Custom fields
3. New options in custom fields
4. Field configuration schemes
5. Field configurations
6. Re-indexing and index recovery

Lab Exercises

1. Create custom fields
2. Define a content
3. Create a field configuration
4. Make use of a field configuration scheme

Module 6: Screens

Module Sections

1. Understanding screen schemes
2. Screen schemes
3. Creating screens
4. Modifying screens

Lab Exercises

1. Create a screen
2. Modify screen contents
3. Implement a screen scheme
4. Implement an issue type screen scheme

Module 7: Workflows

Module Sections

1. The visual workflow designer
2. Planning workflows
3. The status attribute
4. Transitions
5. Mapping workflow status to agile boards
6. Workflow triggers
7. Creating a workflow
8. Creating workflow schemes
9. Workflow sharing

Lab Exercises

1. Add states to a workflow
2. Configure screens on transitions
3. Using post functions and validators
4. Configuring agile boards to match workflow changes
5. Implementing workflow schemes
6. Putting it all together

About this course

Is this course right for me?

This course is ideal for new Jira application administrators and those with the responsibility of defining projects and configurations. Service Desk leads can benefit from understanding the configurable behaviours on request.

Objectives and outcomes

By the end of this course, students will understand how Jira can be tailored to meet the specific needs of projects and processes. Includes an in-depth look at effective administration and configuration methods for the underlying architecture utilised by Jira Service Management.

Prerequisites

- Access to a laptop
- Internet connection

Modules breakdown

Module 1: Jira concepts overview

Module Sections

1. Introduction
2. Summary of users and groups
3. Projects
4. Service Desk projects
5. Issues vs. requests
6. Schemes
7. Audit logs

Lab Exercises

1. Create a Jira Project and project category
 - Based on an existing configuration
2. Exploring the interface

Module 2: Users, groups and access

Module Sections

1. Users and the user browser
2. Customers, agents and collaborators
3. Groups and the group browser
4. Global permissions
5. Service Desk permissions
6. Customer public sign-up

Lab Exercises

1. Public sign-up and groups
2. Add new users and create/assign groups

Module 3: Project administration

Module Sections

1. Project administration vs. global administration
2. Metadata
3. Components
4. Access control
 - Project roles
 - Permission schemes
 - Issue security schemes

Lab Exercises

1. Create a project role and a permission scheme
2. Set up an issue security scheme

Module 4: The atlassian schemes

Module Sections

1. Issue type schemes
2. Notification schemes
3. Events

Lab Exercises

1. Create a notification scheme
2. Create an issue type scheme

Module 5: Fields

Module Sections

1. Priorities and resolutions
2. Custom fields
3. New options in custom fields
4. Field configuration schemes
5. Field configurations
6. Re-indexing and index recovery
7. Mapping fields to the customer view

Lab Exercises

1. Create a screen
2. Create a custom field
3. Apply to a screen
4. Create a field configuration scheme
5. Apply the field to a request type
6. Implement a screen scheme
7. Implement an issue type screen scheme

Module 6: Screens

Module Sections

1. Understanding screen schemes
2. Screen schemes
3. Creating screens
4. Modifying screens

Lab Exercises

1. Modify screen contents

Module 7: Service Desk Management

Module Sections

1. Queues
2. SLAs
 - Creating SLAs
 - Editing SLAs
3. Reports
 - Reports overview
 - Creating new reports
 - Editing reports
4. Setting up SLAs
5. Customer satisfaction
 - Link to Confluence
6. Knowledgebase
7. Branding
8. Approvals and automations

Lab Exercises

1. Manage users
2. Resolve an issue
3. Tailor a customer portal
4. Create a request type
5. Create a queue
6. Create a report
7. Define a calendar
8. Working with SLAs

Module 8: Service Desk workflows

Module Sections

1. The visual workflow designer
2. Building workflows
3. The status attribute
4. Transitions
5. Workflow triggers
6. Creating a workflow
7. Creating workflow schemes
8. Workflow sharing

Lab Exercises

1. Add states to a workflow
2. Configure screens on transitions
3. Using post functions and validators
4. Implementing workflow schemes
5. Putting it all together

Mentoring

 1 Day

 Classroom, Webinar

Are your workflows properly configured? Evaluate your processes with a Clearvision mentor for expert advice on optimisation of your Atlassian tools.

About this course

Is this course right for me?

If you're looking for specific help with your Atlassian tools then this course is right for you.

Objectives and outcomes

A review of your Atlassian environment with guidance on best practices, assistance with planning and hands-on coaching tailored to specific business objectives.

Prerequisites

-Mentoring sessions are attendee led, meaning you need to come prepared with use cases, questions, and goals.

Modules breakdown

Course Information



Learning on-demand.

We want you to make the most of your training with us which is why our mentors can be contacted even after the sessions have ended.