



IT Support Ticketing Lab using Jira

This document provides a step-by-step guide to create a lab environment for showcasing IT Helpdesk competencies using Jira, focusing on simulating real-world ticketing scenarios and applying ITIL (Information Technology Infrastructure Library) concepts.

Objectives:

- Demonstrate the ability to manage IT support tickets using Jira.
- Simulate real-world IT support scenarios.
- Apply ITIL best practices, including incident management, problem management, and service request fulfilment.
- Showcase troubleshooting, prioritization, and communication skills.

Requirements:

- Software and Tools:
 - Jira
 - Browser
- Knowledge:
 - Basic understanding of ITIL concepts
 - Familiarity with Jira workflows and configurations
 - Understanding of common IT support tools like Active Directory, Remote Desktop, etc.
- System Setup:
 - Access to Jira instance (In this case: a browser)
 - Test accounts or personas for simulating user roles
 - VM for testing resolutions

Step 1: Lab Setup

Log into your Jira account.

Your work

Recent projects

Learn Jira in 10 minutes
Team-managed software

Quick links

My open issues 0

Done issues

1 board

Support
Service management

Recent queues

All open 0

Assigned to me 0

3 queues

My Kanban Project
Team-managed software

Quick links

My open issues 0

Done issues

1 board

View all projects

Worked on Viewed Assigned to me 0 Starred

YESTERDAY

- ☒ You're a Jira pro. What's next?
LEARNJIRA-5 · Learn Jira in 10 minutes
- ☒ Workflows 101: How to work smart with insights and automations
LEARNJIRA-4 · Learn Jira in 10 minutes
- ☒ Teams 101: How to boost teamwork using invites and permissions
LEARNJIRA-3 · Learn Jira in 10 minutes
- ☒ Issues 101: How to write excellent tasks your team will love
LEARNJIRA-2 · Learn Jira in 10 minutes
- ☒ Become a Jira pro in 10 minutes or less
LEARNJIRA-1 · Learn Jira in 10 minutes

Service project successfully moved to trash

Go to trash · Restore

On-call schedules

Build your on-call routine

Make sure that your team is always on-call to respond to critical alerts and incidents.

Read more about on-call schedules

Alerts

Configure your alerts

Be notified of important events in monitoring tools to ensure service health and quality.

Read more about alerting

Activate Windows

Go to Settings to activate Windows.

Navigate to Projects

Your work

Recent projects

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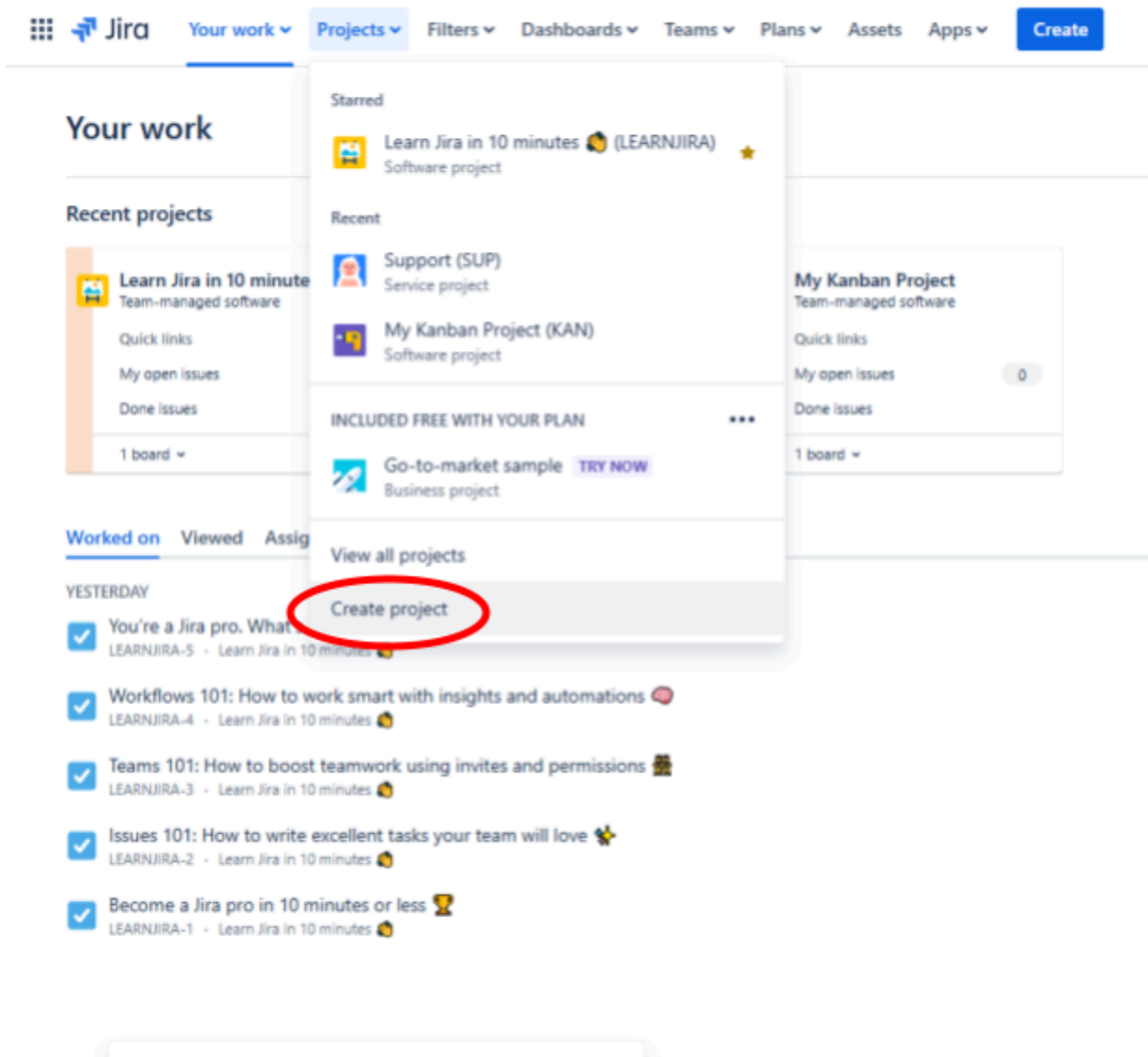
View all projects

Worked on Viewed Assigned to me 0 Starred

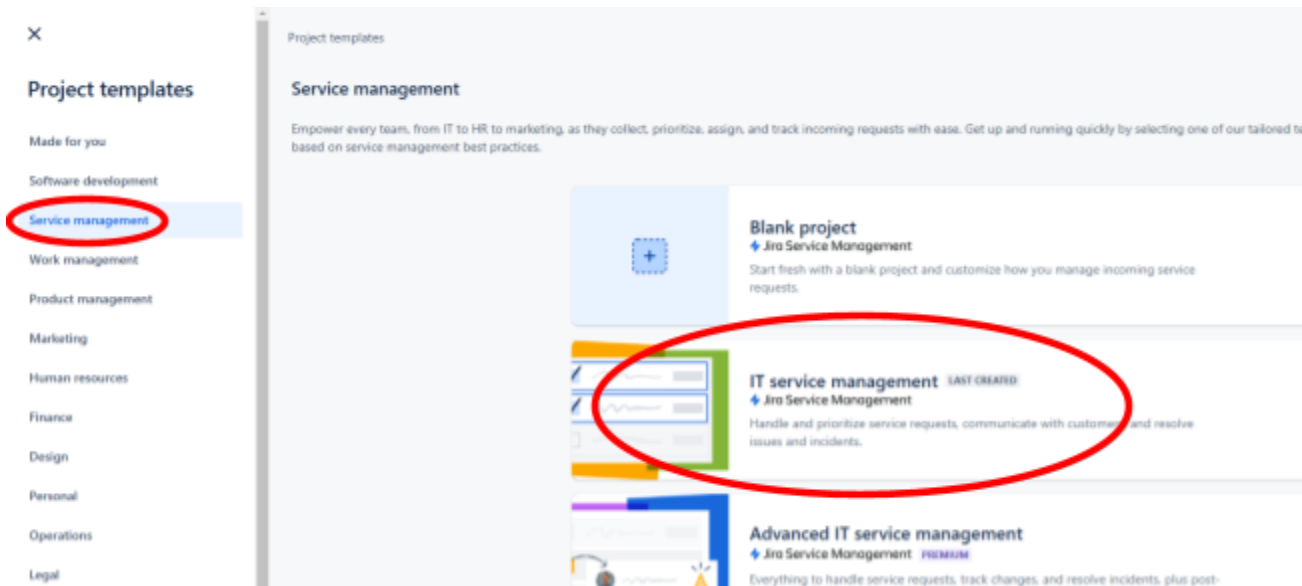
YESTERDAY

- ☒ You're a Jira pro. What's next?
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LEARNJIRA-1 · Learn Jira in 10 minutes

Select Create Project



Choose IT Service Management, under Service Management, as the project Template.



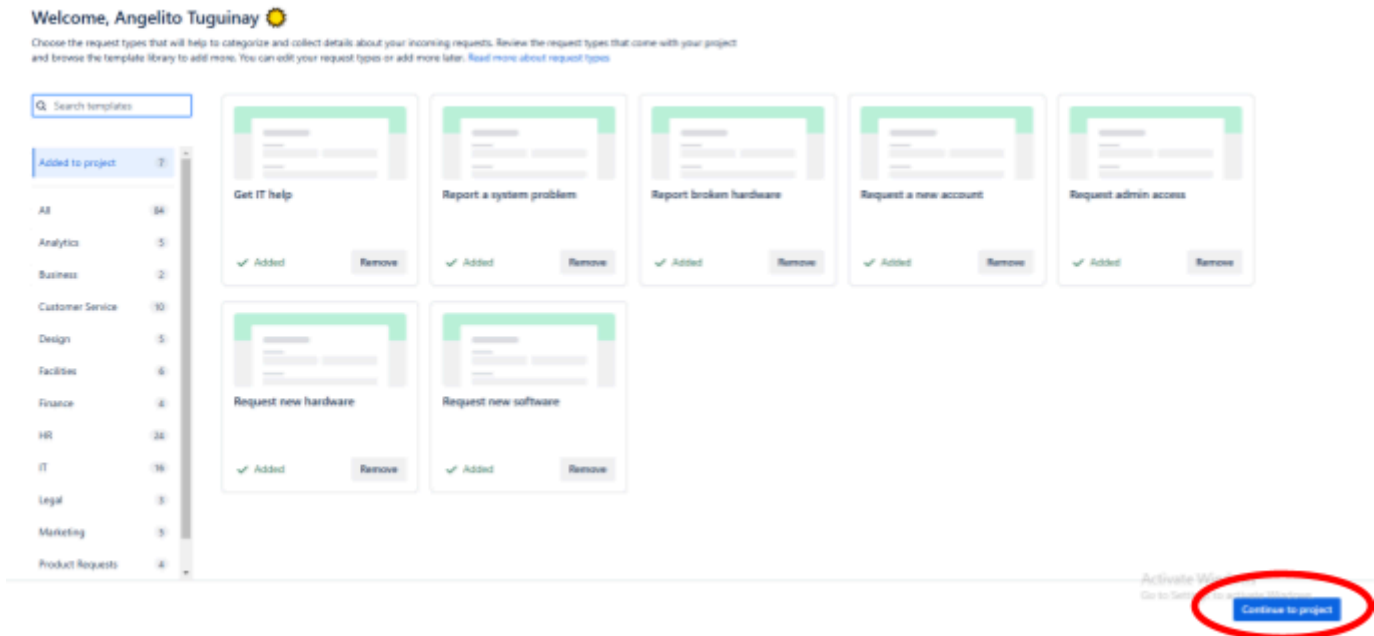
Click on Use Template



Name your Project - we will name ours ITSL Lab, and assign Team type (In our case - Information Technology (IT)). We will leave the Channel access as Open. When everything is filled out, click Create Project.

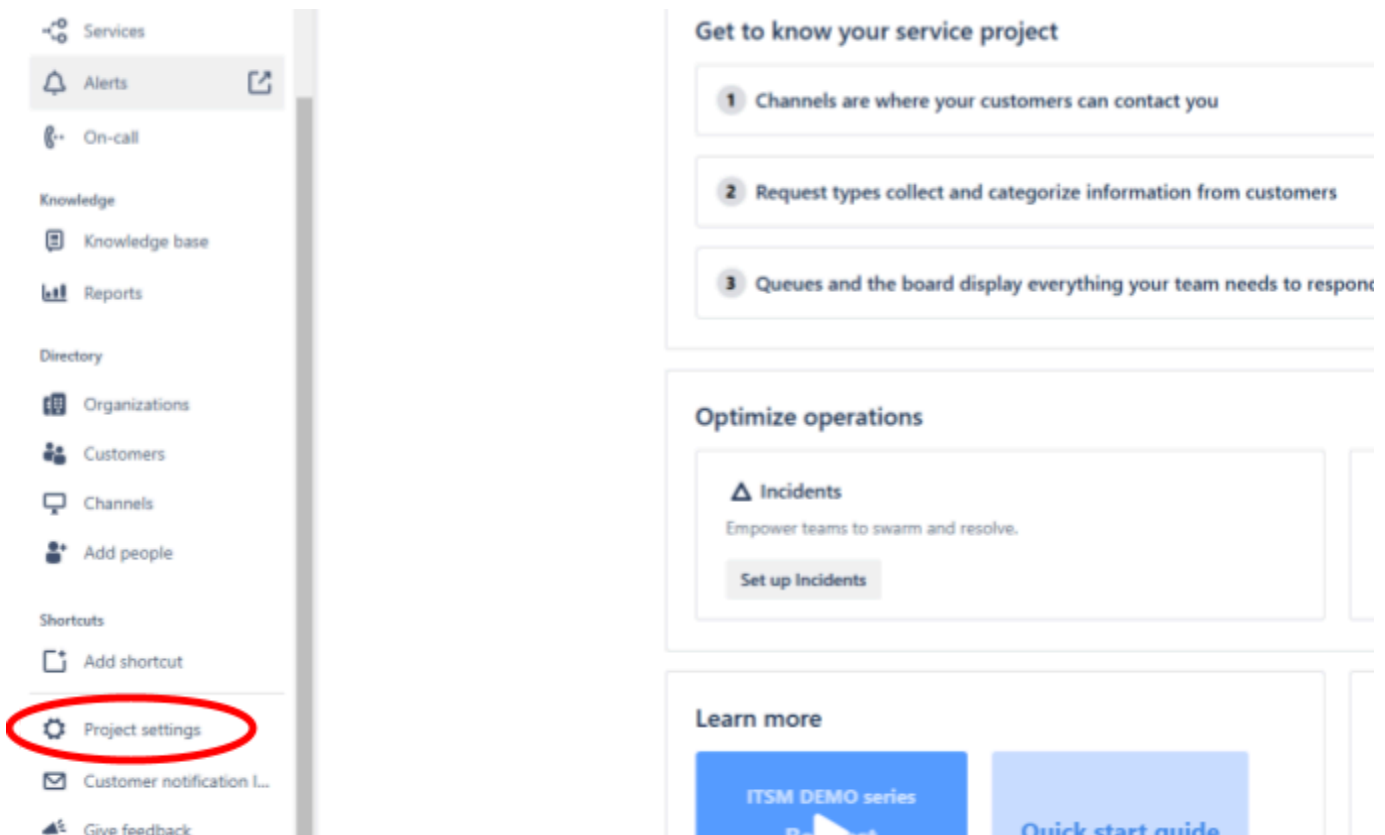
This screenshot shows the 'Create project' form. It includes fields for 'Name' (filled with 'ITSL Lab'), 'Key' (filled with 'ILAB'), 'Team type' (set to 'Information technology (IT)'), and 'Channel access' (set to 'Open'). Red arrows point to each of these fields. Below these is a 'Template' section where 'IT service management' is selected. At the bottom, there is a 'Create project' button circled in red, and a 'Cancel' button to its left. A sidebar on the right shows a list of projects, all named 'ILAB...', and a 'Help center' link.

We will deal with request types later. For now, let's click Continue to Project



Step 2: Customize the Workflow

Navigate to Project Settings on the panel on the left



Click on Workflows on the the left side panel

The image shows the Jira interface. On the left, the sidebar contains a list of navigation items: Summary, Features, Access, Request management, Request types, Service requests, Incidents, Unassigned, Forms, Workflows (highlighted with a red circle), SLAs, Customer satisfaction, Issue types, Fields, Screens, and Automation. On the right, the 'Project settings' form is visible. It includes fields for Name (ITSIL Lab), Project key (ILAB), Team type (Information technology (IT)), URL, Project type (Jira Service Management), and Category (Choose a category). A 'Change icon' button is at the top right of the form.

For the lab, we will be adding an existing workflow called Classic Default Workflow, which should suffice for everyday IT tickets.

To begin, click on Add Workflow

The image shows the Jira 'Workflows' page for the 'ITSIL Lab' project. The page title is 'Jira Service Management IT Support Workflow Scheme generated for Project ILAB'. A blue banner at the top says 'Speed up your team's workflow updates' and 'Grant your team the Edit Workflows permission so they can manage workflows themselves.' Below this, there are two buttons: 'Add Workflow' (highlighted with a red circle) and 'Switch Scheme'. A table lists the existing workflows and their associated issue types.

Workflow	Issue Types
ILAB: Incident Management workflow for Jira Service Management (View as text / diagram)	[Red icon] [System] Incident (Assign)
ILAB: Jira Service Management default workflow (View as text / diagram)	[Blue icon] Task (Assign) [Blue icon] Sub-task (Assign)
ILAB: Service Request Fulfillment with Approvals workflow for Jira Service Management (View as text / diagram)	[Purple icon] [System] Service request (Assign)
ILAB: Service Request Fulfillment workflow for Jira Service Management (View as text / diagram)	[Green icon] [System] Service request (Assign)

On the dropdown, click on Add Existing

Jira

ITSL Lab
Service project

Back to project

Features

- Access
- Request management
 - Request types
 - Service requests
 - Incidents
 - Unassigned
- Forms
 - Workflows**
 - SLAs
 - Customer satisfaction
 - Issue types
 - Fields
 - Screens
- Automation
 - Channels & self service
- Portal

Projects / ITSL Lab / Project settings

Workflows

Jira Service Management IT Support Workflow Scheme generated for Project ILAB

Speed up your team's workflow updates
Grant your team the **Edit Workflows** permission so they can manage workflows themselves.
[Go to permission schemes](#)

Add Workflow **▼** Switch Scheme

Add Existing

Choose from Marketplace workflow for Jira Service Management (View as text / diagram)

ILAB: Jira Service Management default workflow (View as text / diagram)

ILAB: Service Request Fulfilment with Approvals workflow for Jira Service Management (View as text / diagram)

ILAB: Service Request Fulfilment workflow for Jira Service Management (View as text / diagram)

Issue Types

- [System] Inc (Assign)
- Task
- Sub-task (Assign)
- [System] Ser (Assign)
- [System] Ser (Assign)

Select Classic Default Workflow and click Next

Builds Workflow

Jira Workflow (jira)

classic default workflow

ITLAB: Incident Management workflow for Jira Service Management

ITLAB: Jira Service Management default workflow

ITLAB: Service Request Fulfilment with Approvals workflow for Jira Service Management

ITLAB: Service Request Fulfilment workflow for Jira Service Management

classic default workflow

Diagram showing the workflow flow: OPEN, IN PROGRESS, RESOLVED, REOPENED, CLOSED.

Description The classic JIRA default workflow

Last modified **Saturday 5:53 AM**

Next Cancel

Assign Task and Service Request as the Issue Type and click Finish

Assign Issue Types to "classic default workflow"

<input type="checkbox"/> Issue Type	Currently Assigned Workflow
<input type="checkbox"/> [System] Incident	ILAB: Incident Management workflow for Jira Service Management
<input checked="" type="checkbox"/> [System] Service re...	ILAB: Service Request Fulfilment workflow for Jira Service Management
<input type="checkbox"/> [System] Service re...	ILAB: Service Request Fulfilment with Approvals workflow for Jira Service Management
<input type="checkbox"/> Sub-task	ILAB: Jira Service Management default workflow
<input checked="" type="checkbox"/> Task	ILAB: Jira Service Management default workflow

Step 3: Set up Request Types

On the left side panel, click Service requests under Request Types

Project settings

- Details
- Summary
- Features
 - Access
 - Request management
 - Request types
 - Service requests**
 - Incidents
 - Unassigned
 - Forms
 - Workflows
 - SLAs
 - Customer satisfaction

Make these request types available in your customer portal by editing y

Find request type

Request type and description	Issue t
Get IT help Get assistance for general IT problems and questions.	<input checked="" type="checkbox"/> (1y)
Onboard new employees Request access for new employees.	<input checked="" type="checkbox"/> (1y)
Request a new account Request a new account for a system.	<input checked="" type="checkbox"/> (1y)
Request admin access For example, if you need to administer Jira.	<input checked="" type="checkbox"/> (1y)
Request new hardware For example, a new mouse or monitor.	<input checked="" type="checkbox"/> (1y)

Let's create a request type by clicking on Create Request Type and selecting Create Blank

ashboards Teams Plans Assets Apps Create

Premium trial Search

Projects / ITSL Lab / Project settings

Service requests

Customize the types of service requests your project will use. These will appear in your project navigation under "Service requests". Make these request types available in your customer portal by editing your portal groups.

Find request type

Issue types Portal groups

Create request type

Create from template

Create blank

Create using AI

Request type and description	Issue type	Workflow	Portal groups	Restrictions	Actions
<div>Get IT help</div> <div>Get assistance for general IT problems and questions.</div>	[System] Service request	ITLAB Service Request Fulfillment workflow for Jira Service Management	(Used in 2 groups)		...
<div>Onboard new employees</div> <div>Request access for new employees.</div>	[System] Service request	ITLAB Service Request Fulfillment workflow for Jira Service Management	Logins and Accounts		...
<div>Request a new account</div> <div>Request a new account for a system.</div>	[System] Service request	ITLAB Service Request Fulfillment workflow for Jira Service Management	(Used in 2 groups)		...
<div>Request admin access</div> <div>For example, if you need to administer Jira.</div>	[System] Service request	ITLAB Service Request Fulfillment workflow for Jira Service Management	Logins and Accounts		...
<div>Request new hardware</div> <div>For example, a new mouse or monitor.</div>	[System] Service request	ITLAB Service Request Fulfillment workflow for Jira Service Management	Computers		...

We will name this request type “Password Reset”. For the Description, we will type “For requesting a password reset for user accounts”. For the Portal Group, we will choose “Common Requests” and “Logins and Accounts”. We will leave the default “Service Request” for the Issue Type. When finished, click Add.

Review request type details

Make it easy for people to find and use this request form. Name your request type, describe what it's for, and assign it to a portal group. You can edit these details later.

Required fields are marked with an asterisk.*

Name*

Password Reset

Description

For requesting a password reset for user accounts

Icon

Change icon

This will appear under the request type's name in the portal.

Portal group

Common Requests Logins and Accounts

This request form will appear in the chosen portal group.

Issue type

[System] Service request

The issue type determines the workflow and fields that are visible for this request type.

Cancel

Add

Blank

Create your own request type to meet your needs.

This is the form people will fill out for this request type. It will be created in your project's default language and can be edited later.

What can we help you with?

+

Password Reset

For requesting a password reset for user accounts

Summary*

Send Cancel

Activate Windows

Powered by Jira Service Management

Step 4: Create Custom Fields

We will provide instructions on what to include for the password reset: Full Name, Username/Email, Contact Information for verification, and Urgency level. Once we have included those fields, click on Save Changes.

Instructions

Request form help and instructions ⓘ

Please include:

- Full Name
- Username/Email Address of the account that needs the password reset.
- Contact information: optional phone number or secondary email for verification
- Select urgency level

Summary REQUIRED ... >

Urgency ... >

Forms Attach form

Search the form template library to create a form to attach to this request type.

Give feedback Discard View **Save changes**

You have successfully create a Request Type

Projects / ITSL Lab / Project settings

Service requests

Create request type ▾

Customize the types of service requests your project will use. These will appear in your project navigation under "Service requests". Make these request types available in your customer portal by editing your [portal groups](#).

Find request type	Issue types ▾	Portal groups ▾			
Request type and description	Issue type	Workflow	Portal groups	Restrictions	Actions
Get IT help Get assistance for general IT problems and questions.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	(Used in 2 groups)		...
Onboard new employees Request access for new employees.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	Logins and Accounts		...
Password Reset For requesting a password reset for user accounts.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	(Used in 2 groups)		...
Request a new account Request a new account for a system.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	(Used in 2 groups)		...
Request admin access For example, if you need to administer Jira.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	Logins and Accounts		...
Request new hardware For example, a new mouse or monitor.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	Computers		...
Request new software If you need a software license, raise a request here.	[System] Service request	ILAB: Service Request Fulfillment workflow for Jira Service Management	(Used in 2 groups)		...

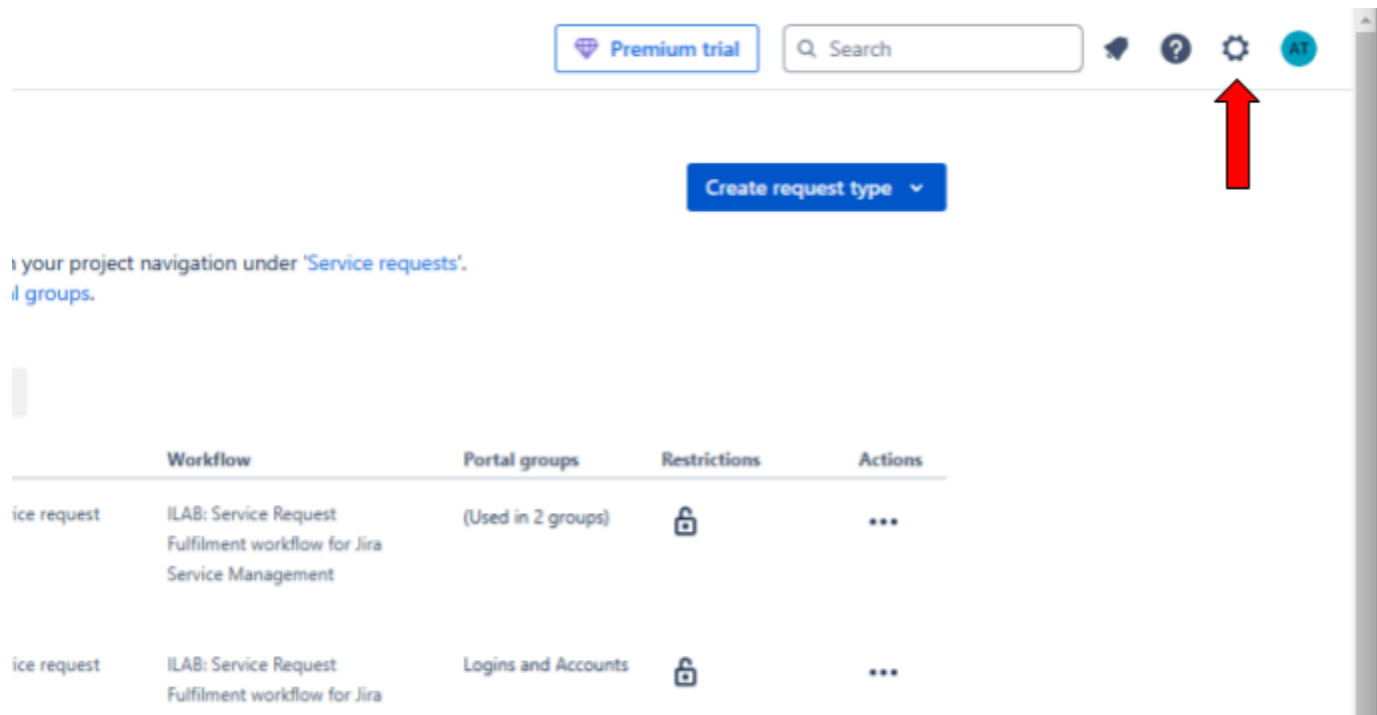
Activate
...Go to Settings

Step 5: Add Test Users

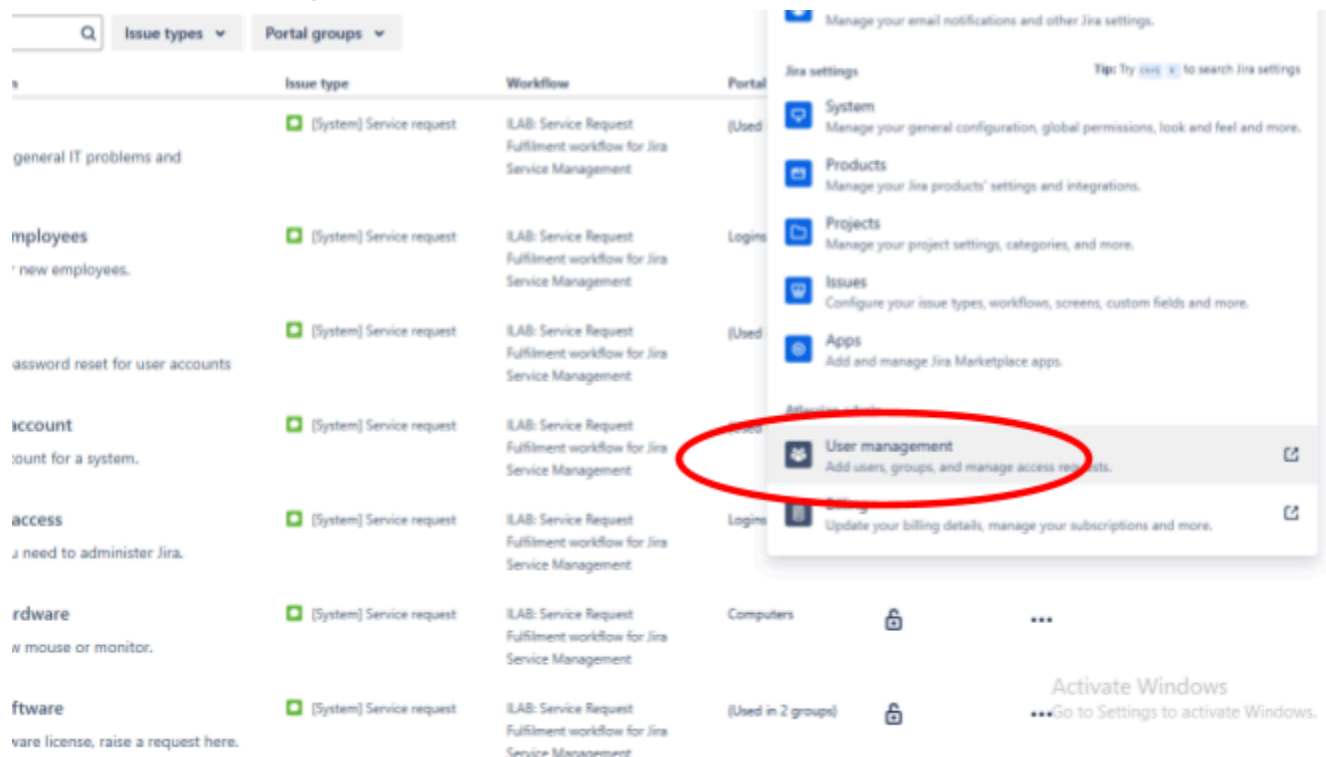
We will create user accounts with the following roles:

- End User to submit tickets
- Helpdesk Analyst to handle tickets
- IT Manager to Approve escalations or changes

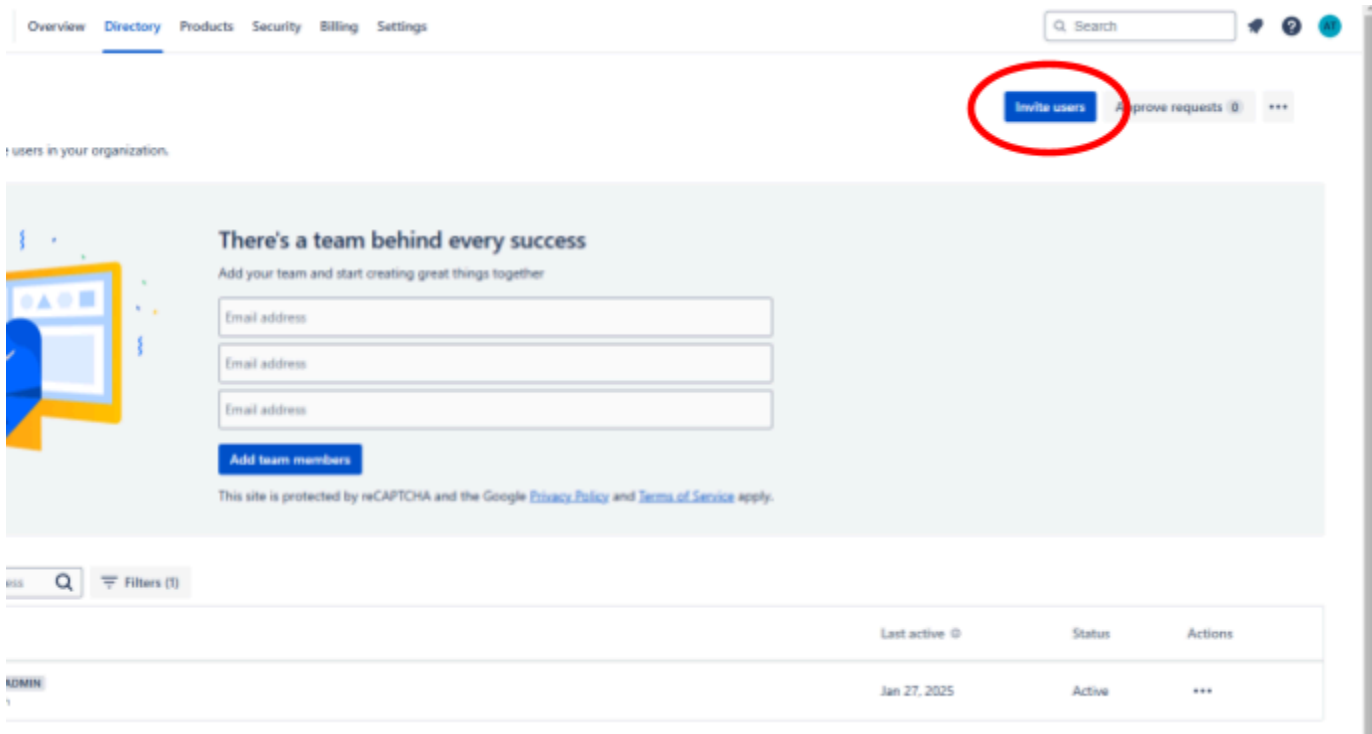
To begin, navigate to Jira Settings in the top right corner



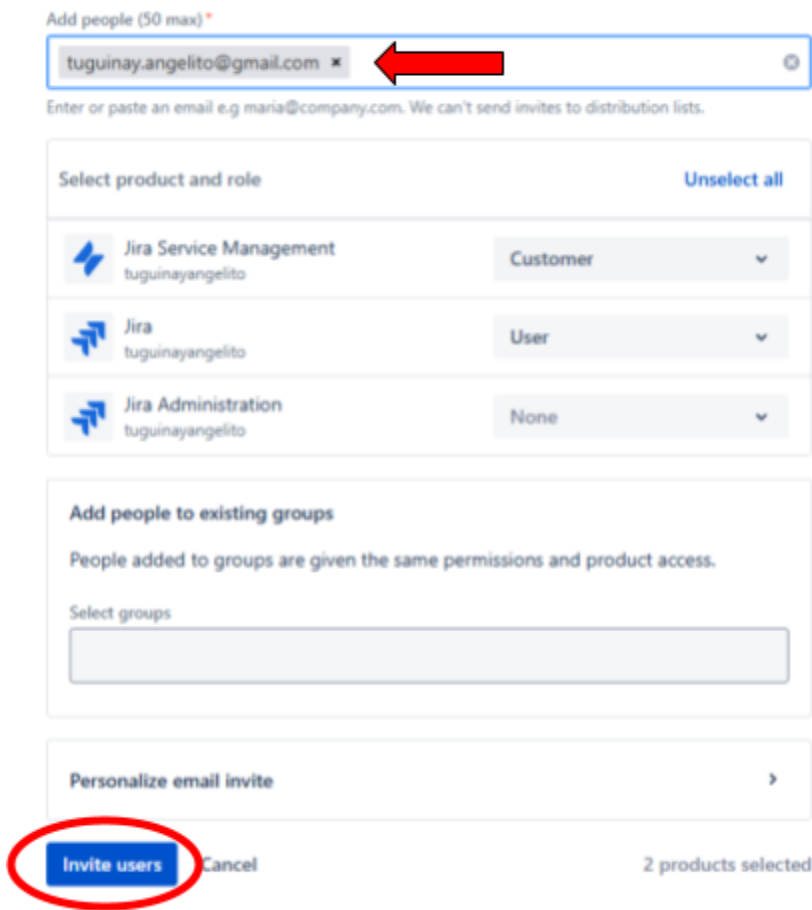
Select User Management from the dropdown menu



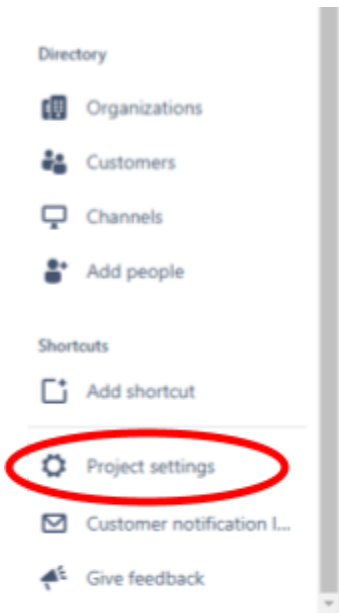
In the User Management page, click Invite Users



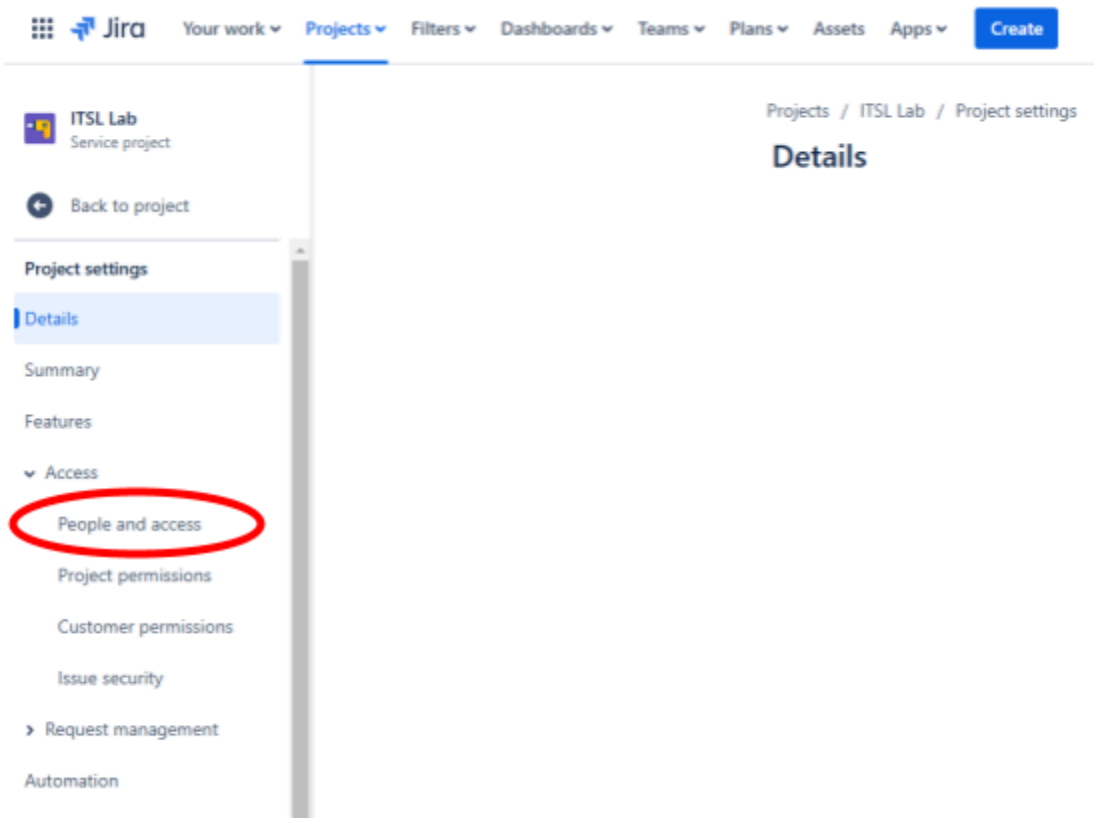
Enter Email addresses of the test users. Since this is for lab purposes, we will use our own email and assume all roles. Once filled out, click Invite Users



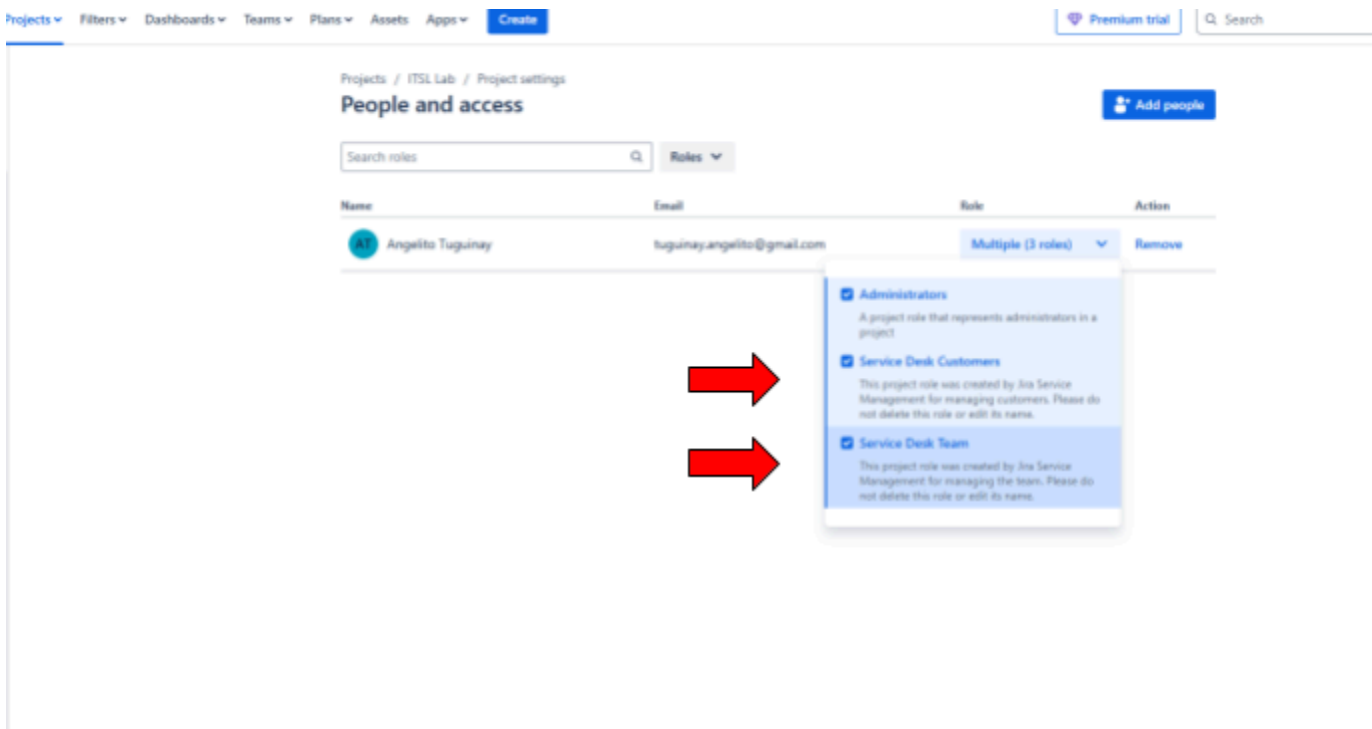
Now, we will assign roles to users (ourselves). In the Jira project, select Project Settings in the left sidebar



Then, click on People and Access under Access on the left sidebar

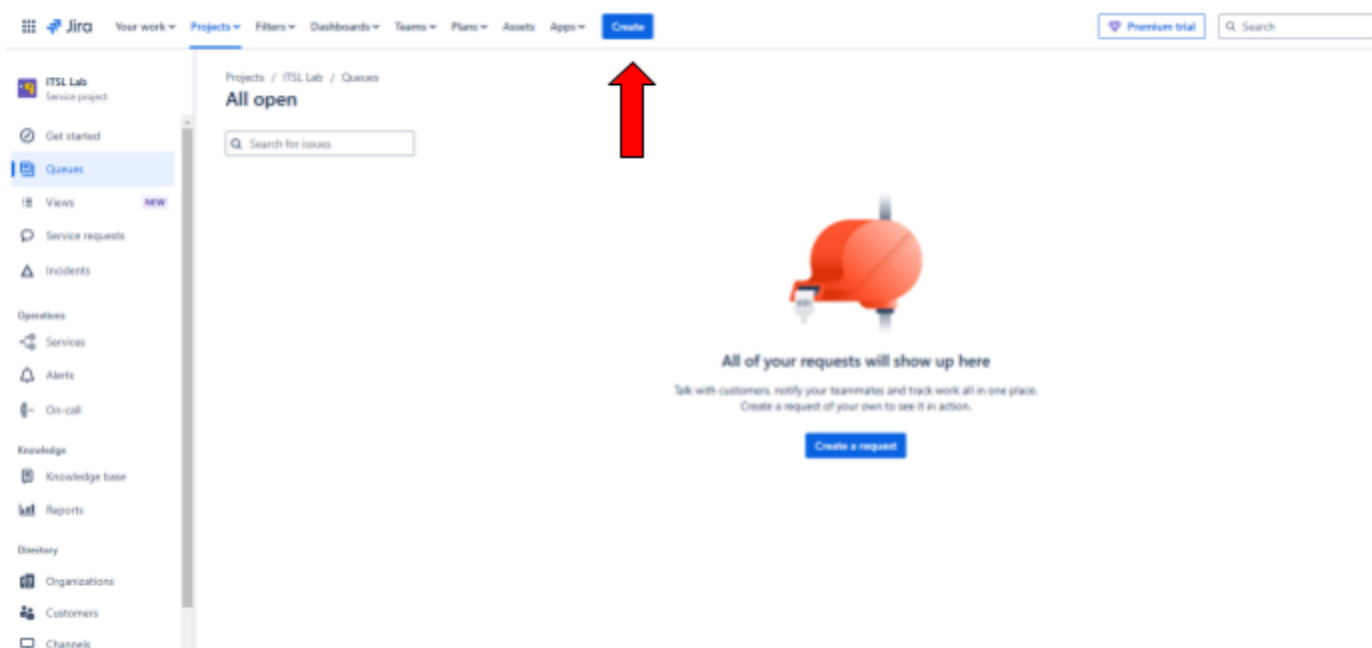


Our name should already have been added since we are assuming the admin role. Under the role dropdown, select Service Desk Customers and Service Desk Team.



Step 6: Create a Ticket



At the top of the page, click on Create



On the Create issue window, select Service Request as the Issue Type. For the Request Type, select Password Reset (The custom request we created earlier). Type “Need to have my password reset after accidentally exposing password” under Summary. Choose “Medium” for the Urgency dropdown. Click Create when finished.



Create issue — ✕ ×

Issue type *

 [System] Service request 

[Learn about issue types](#)


Request type * What's this?

 **Password Reset** 
For requesting a password reset for user accounts


Please include: - Full Name - Username/Email Address of the account that needs the password reset. - Contact information: optional phone number or secondary email for verification - Select urgency level

☒ Use request type fields ⓘ


Raise this request on behalf of *

 Angelito Tuginay

Summary *

Need to have my password reset after accidentally exposing password 

Urgency

Medium 

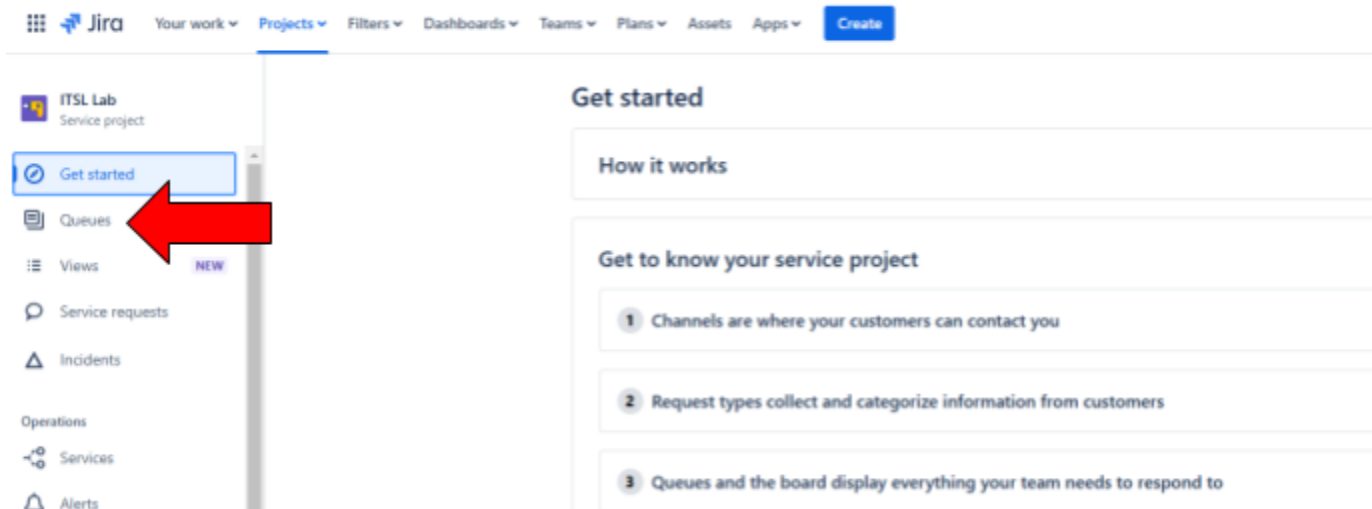
Organizations

Select organization

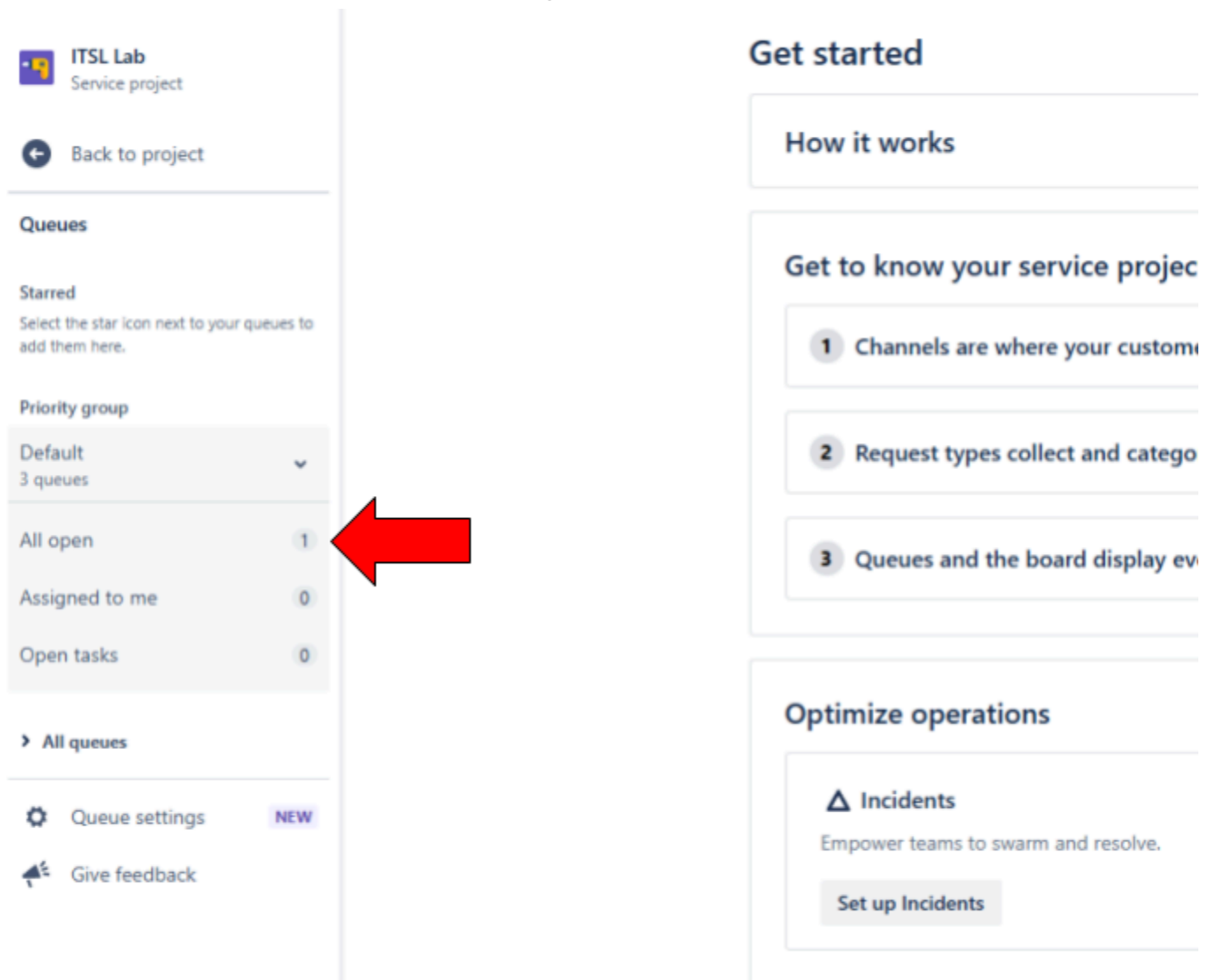
☐ Create another issue

Cancel **Create**

You can view this ticket in the Queues section on the left sidebar



Click on All Open to view open unassigned tickets



There, we will find the ticket we created earlier that is requesting for password reset

Projects / ITSL Lab / Queues

All open

Search for issues

1 issue

Request type	Key	Summary	Reporter	Assign
+ Password Reset	ILAB-1	Need to have my password reset after accidentally exposing password	Angelito Tuguinay	Unassigned

Click on the ticket to open its details. Right now, it has the status of “Waiting for Support”. Add an Internal note describing what actions you have taken to let your teammates know that you are currently or have resolved the issue. Click Save.

View request in portal

Urgency Medium

Description

Add a description...

Similar requests

Activity

Show: All Comments History Work log Approvals

Summary Newest first

Add internal note / Reply to customer

Pro tip: press **Alt** to comment

Angelito Tuguinay 32 seconds ago

Add internal note Reply to customer

Normal text

I have gone into Active Directory Users and Computers and Reset the user's password. I have made sure to allow "User Must Change Password at next login"

Save Cancel

Waiting for support

Actions

SLAs

Tomorrow 03:40 PM Time to first response within 12h

Feb 05 11:40 AM Time to resolution within 40h

Pinned fields

Click on the **g** next to a field label to start pinning.

Details

Assignee Unassigned

Reporter Angelito Tuguinay

Request Type + Password Reset

Priority Medium

More fields Labels, Request participants, Approvals, Organizations, Time

Automation Rule executions

Created 10 minutes ago

Updated 10 minutes ago

Activate Windows

Go to Settings to activate Windows

Notify the Reporter and ensure that you are working towards resolving the issue.

show: All Comments history work log Approvals

Summarize newest first

AT Add internal note Reply to customer

Ad B I ... A ...

Hi there,

Thank you for your patience. I have reset your password. Please let me know if you have successfully logged in with a new password.

Save Cancel

Once the Reporter confirms that the issue has been resolved, you can update the status of the ticket to Resolved and let the Reporter know that you have taken action to resolve the issue.

Hide details

Summarize Newest first

me know if you have successfully logged in with a new password.

Waiting for support Actions

Escalate this issue → ESCALATED

Respond to support → WAITING FOR SUPPORT

Cancel request → CANCELLED

Resolve this issue → RESOLVED

View workflow

Pinned fields

Click on the next to a field label to start pinning.

Details

Assignee Unassigned

Reporter Angelito Tuguinay

Request Type Password Reset

Priority Medium

Resolve this issue

Resolution

Done



Linked Issues

is caused by

Issue

Begin typing to search for issues to link. If you leave it blank, no link will be made.

Comment

Respond to customer

Internal comment

Your comment will be visible to customers. Embed attachments to make them visible to customers.

Style **B** *I* U A ~~A~~     

Hi there,

Thank you for your patience. I have reset your password. Please let me know if you have successfully logged in with a new password.

[preview](#) · [syntax help](#)

Resolve this issue

Cancel

Resolved ▾ Done ⚡ **Actions** ▾

SLAs ^

Feb 06 04:01 PM 🕒

Time to close after resolution within 60h

Today 11:57 AM

Time to first response within 12h

Today 12:01 PM

Time to resolution within 48h

Pinned fields ×

Click on the 📌 next to a field label to start pinning.

Details ^

Assignee

Unassigned

[Assign to me](#)

Reporter

Angelito Tuguinay

Request Type

Password Reset

Priority

Medium

More fields Labels, Request participants, Approvers, Organizations, Time tracking, Approve... ▾

This concludes the lab.