ATLASSIAN University

Managing Jira Service Projects

Lab Workbook

ATLASSIAN University

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Introduction

Lab format

Optional exercises and appendices

The labs may have optional exercises. These are not required to complete the course. However, if you have time and interest, they supplement the exercises for the lab. There may also be appendices that you don't need to complete the class. They are full of useful information like additional reading and best practices. Dig into these after you complete the course!

Language and User Interface

The language you see in the Atlassian product UI is set to your browser's language. If you wish to see the UI in English (to match the lab instructions), or in a different language, go to your Atlassian user profile and edit your account preferences.

Cloud products are constantly being updated with new features, so you may see some slight differences between the lab instructions and the product you are using.

Logging in to your lab environment

To log in during the labs, you need your assigned site URL and the user's email address specified in the lab directions and password. If you're taking an On Demand course, you'll find these in the **Virtual Lab Instructions** activity in the **Lessons** section. If you're taking an instructor-led course, your instructor will share these details with you.

ⓘ The password for every user is the same. Keep this password easily accessible.

⚠ When switching between products in these labs, you can see other sites. It's important that you choose the product on the site that's been assigned to you.

Here's a list of the user(s) and what role they have in this course.

Name	Role
Jo	Jira administrator
Al	Service project administrator
Vi	Service project agent

Name	Role
Li	Service project customer
Bo	Software developer

Lab 1 Logging into your site

Logging into your lab

To log in during the labs, you need an assigned **site URL** and each user's **email address** and **password**. If you're taking this as an OnDemand course, you'll find this in the **"Virtual Lab Instructions"** activity. If you're taking an instructor-led course, you'll receive the details from your instructor.

The **password** for **every user** is the **same**.

Do not log in with your own Atlassian ID

You probably already have an Atlassian account that you use to log in to your own Atlassian products. In the labs for this course, a specific set of users has been added to the cloud site. You will log in with these accounts. Do not log in using your own Atlassian ID.

Log in using a new browser, or an Incognito or Private window

A single browser can only handle one Atlassian account. This is because browsers keep cookies. Once you're logged into a cloud site on one browser, it remembers that login. So, if you open a new tab, you can't login as someone else.

To log into your lab, use a different browser to the one you usually use, or use an incognito or private window to log in.

Logging into labs as different Users

In the labs you'll need to log in as one or more users. To avoid logging in and out a lot you can either use different browsers or use an incognito or private window for each user.

Opening an Incognito window

> ⓘ You can open either an incognito window (Chrome) or private window (Firefox) from the browser menu. Other browsers also have the same functionality.

Chrome

1. Either:
    a. Click the Chrome three-dot (ellipses) menu button or
    b. From the Chrome browser menu click File.
2. In the dropdown menu, click New Incognito Window

Firefox

1. Either:
    a. Click the three-line Firefox application menu or
    b. From the Firefox browser menu click File.
2. In the dropdown menu, click New Private Window

Accessing your site

1. Use your assigned **site URL to navigate to your site.**

You're all set!
When you get to Jira/Confluence, you'll be told who to log in as.

Lab 2 Creating a service project

ⓘ When you create your new project, you will be asked to create it in one of two ways. This is dependent on the environment version that you are logged into. For this reason, in the first part of the lab, you'll be offered two options for creating your project.

Create a Jira Service Management project

1. Log in as **Jo**, the Jira administrator.
2. From the menu click **Projects** then select **Create project**.

Option 1:

If you see the **Create project** page:

1. Name the project **IT Services** and leave the key as **IS**.
2. Click **Change template**.
3. If you don't see Service project selected at the top of the page, click the drop-down and select **Service project**.
4. Select the **IT service management** template.
5. Click **Create** to create your new Service project.

Option 2:

If you see the **Project templates** page:

1. In the sidebar, click the **Service management** link.
2. Select the **IT service management** project option.
3. Click **Use template**.
4. Name the project **IT Services** and leave the key as **IS**.
5. If required, select **Information Technology (IT)** in **Team type.**
6. Click **Create project** to create your new service project.

Define a project lead for the project

1. From the project sidebar, click **Project settings.**
    a. You're taken to the **Details** page.
2. Near the bottom of the page, update the project lead to **Al**.
3. Click **Save**.

Assign service project administrator role

1. In the project settings sidebar, click **People.**
2. Click **Add people**.

3. In the **Type a name, group or email address** text field, enter then select **Al**.
4. From the role dropdown, click **Choose role** and select **Administrators**.
5. Click **Add.**
6. Click **Back to project** in the sidebar to exit the project settings.

Congratulations on completing the lab!

Lab 3 Requests and queues

In this lab you will:

1. Set up request types
2. Create and manage queues

Lab 3 Exercise 1 Setting up request types

View requests via the help center

1. Make sure you're logged in as **Jo.**
2. If you're not already there, navigate to the **IT Services** project from the Projects menu.
3. In the project sidebar, click **Channels**.
4. From the pop-up window, hover over **PORTAL** and click **Open**.
5. Click **Servers and Infrastructure**.
6. Click **Report a system problem**.
   Note: Here you can see the pre-defined fields that have been configured for this request type.
7. Scroll down and click **Cancel** to return to the customer portal.
8. Return to the **original browser tab** where your service project is open.

View request types in the service project

1. From the **IT Services** project sidebar, click **Project settings**.
2. Click **Request types.**
3. Find the **Get IT help** request type.
4. Hover your mouse over **(Used in 2 groups)** in the **Portal groups** column**.**
   - **Note:** Requests can appear in more than one Portal group.

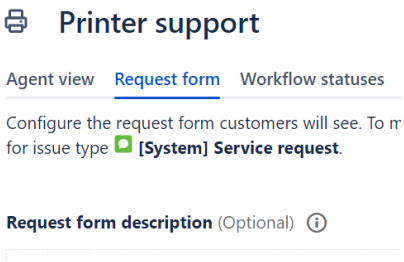
Add a new request type

1. Click **Create request type** and select **Create custom**.
2. Create a new request type:
   a. Name: **Printer support.**
   b. Icon: click **Change icon.**
   c. Click the **ellipsis (...)** next to the last icon to find more icons.
   d. Scroll down and click the **printer icon**.
   e. Click **Save** to select the icon.
   f. From the **Issue type** dropdown, select the **[System] Service request** issue type and click **Next.**
3. Check the **Common Requests** portal group and click **Create.**

Edit request fields

Option 1

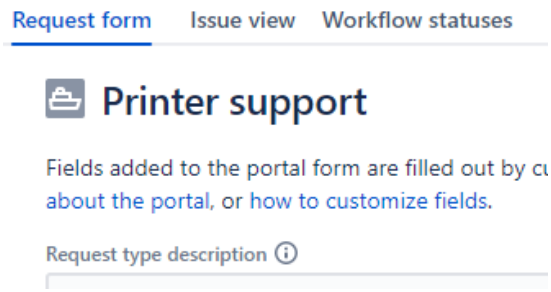
If the tabs you see are **Request form** and **Agent view**:



1. Click the **Request form** tab.
2. Under **Visible fields** section, find **Summary.**
    a. Change the display name to **Summarize the problem** and then click the **Update** button.
3. Click **Add a field**.
    a. On the **Add a field** dialog, check **Priority** and then click **Apply**.
4. In the **Visible fields** section, find the **Required field** for Priority and change it to **Yes.**
    a. Click **Update**.

Option 2

If the tabs you see are **Request form** and **Issue view**:



1. Click the **Request form** tab.
2. Click the **Summary** field to open the options for the field.
    a. In the **Display name** field, change the display name to **Summarize the problem** and then click **Save changes**.
3. In the Fields side panel on the right, locate the **Priority** field.
    a. Drag it to the Printer support request type fields, below the **Summary** field.
4. Click the **Priority** field you just added.
    a. Select the checkbox for **Required**. Click **Save changes**.

Edit workflow statuses

1. Click the **Workflow Statuses** tab.
2. Under **Status name to show customer**, click the **Resolved** status name and change it to **Completed.**
3. Click **Save.**

Verify the new request type

1. Return to the **Request form** tab.
2. Click the **View** or **Preview** button.
    - **Note:** Here we see the request as customers will see it on the customer portal with the reworded field name and the addition of the Priority field.
3. Click **Cancel** and return to the **original browser tab** where your **IT Services** project is open.

Edit request type groups

1. Go back to **Project settings** and click **Request types.**
2. In the sidebar, click **Service requests**.
3. Hover over the **Printer support** request type and click the **ellipsis (...)** menu on the right-hand side.
4. Select **Edit**, under **Portal Group** section
5. Check **Computers**.
6. Click **Save**.
7. In the sidebar, click **Back to project settings**
    a. Click **Portal settings.**
    b. Click the **Portal groups** tab.
8. Find the **Computers section** and click on the **drop-down arrow** to reveal all requests in this group.
9. Drag and drop the new **Printer support** request type so it appears under **Get IT help**.

Verify the changes in the customer portal

1. Navigate to your customer portal.
    - If you still have your customer portal open in a browser tab go to the tab and refresh the page. If not, click **Back to project** then **Channels** icon in the project sidebar and hover over the **PORTAL** channel URL to select Open.
2. Click **Computers**.
    - You should see your new **Printer support** request type listed second under Get IT help.

View requests and issues

1. Return to the browser tab where you have the **IT Services project** view open.
2. Click **Back to project** and then click **Queues**.
3. Click **Create** from the top toolbar or click **Create a request** on the page.
4. In the Create issue window, add:
    a. Project: **IT Services.**
    b. Request type: **Request new software**.
    Note: The **Issue type** field value will adjust based on the select **Request type.**
    c. Summarize the request: **New license required.**
    d. Fill out the **Description** field. This field can also be named **Why do you need this?**

e. Click **Create**.
    - After a short time, your request appears in the All open tickets queue. You might need to refresh the page.
f. Open your request by clicking on the **Key** or **Summary** link.
g. Click **View request in portal** (just above the Description field).
    - You should now see the service request in the customer portal. This is the customer view of the issue you just created.
h. Close this tab and return to the service project view.

Lab 3 Exercise 2 Creating & managing queues

View default queues

1. Return to the service project.
2. Click **Queues**.
    - **Note:** In the **Queues** list, you see the default queues. Since there is only one issue in this service project, only one issue appears in a queue: the **All open tickets** queue.

Create a queue

1. Click **Manage queues** then **Create new queue**.
2. Add a queue Name (at the top): **Waiting on customer**.
3. Under the queue Name, check **Add to Team priority.**
4. For Filter by, select:
    - Type: Leave as **All** to show all issue types.
    - Status: **Waiting for customer**.
    - Resolution: Select **Unresolved**.
    - Click **More** and select **Assignee**.
    - For **Assignee**, select **Current User**.
5. For **Columns**, leave the default columns to show **Issue Type**, **Key**, **Summary**, **Reporter**, **Assignee**, **Status**, **Created**.
6. At the bottom of the page Click **Create.**
   Now you can see the Waiting on customer queue at the bottom of the list.

Reorder queues

1. You can grab your new **Waiting on customer** queue and drag it up to a different position in the Team Priority section. Make sure it's placed at the bottom of the queue.

Verify your new queue and workflow status

1. Make sure you're logged in as **Jo**, who's having printer problems.
2. Click **Back to projec**t and click **Channels** in the project sidebar.
    a. From the pop-up window, click **PORTAL** then **Open**.
        i. Click **Common Requests.**
        ii. Click **Printer support** and enter:
        iii. Summarize the problem: **Second floor printer is not responding.**
        iv. Priority: **High.**
        v. Click **Send**.
            - **Note:** the **status** is initially set to **WAITING FOR SUPPORT**.
    b. Close the portal window.
    c. **Log in** as **Al**, the project administrator.

- **Note**: If you only have one browser and are already using a private or incognito window, you'll need to log out as Jo and log back in as Al. However, if you're using a normal window in a browser, you could open a private or incognito window to log in as Al, keeping Jo logged in in the normal window.

d. Navigate to the **IT Services** project **Queues** page.
e. View the **All open tickets** queue.
f. Open the new **Printer support** ticket.
g. Click the assignee field and assign to **Al** (**Assign to me).**
    - **Note:** The issue will now appear in the **All open tickets** and **All my tickets** queues.
h. Click **Respond to customer** in workflow transition dropdown menu.
i. Enter **The printer has been restarted. Please confirm you can now print** as a comment**.**
j. Click **Respond to customer.**
    - **Note**: The issue now appears in the All open tickets, Waiting on customer, and All my tickets queue. This confirms the new queue is working correctly.
k. Al just received a message from Jo saying she can now print and the request can be closed:
    i. Click **Waiting for customer** on the top right of the screen.
    ii. Select **Resolve this issue**.
l. On the Resolve this issue dialog, enter:
    - Resolution: **Done.**
    - Comment: **Thanks for the message that you can now print.**
    - Click **Resolve this issue**.
m. Finally, log back in as **Jo** (or return to her browser window):
    i. Return to the **IT Services** project's **customer portal** and refresh the page.
        - If you closed the customer portal tab, return to the **IT Services** project and click **Channels** then **PORTAL** then **Open**.
    ii. Click **Requests** in the top-right hand area of the header and select **Created by me**.
    iii. In the search area at the top of the Requests page, click **Open requests** and select **Closed requests** from the status search dropdown menu.
    iv. Here you will see Jo's closed printer support request.

Congratulations on completing the lab!

Lab 3 Appendix

Further Reading

Reference	URL
Setting up request types	https://support.atlassian.com/jira-service-management-cloud/docs/categorize-customer-requests-into-request-types/
Setting up queues for your team	https://support.atlassian.com/jira-service-management-cloud/docs/triage-customer-requests-for-your-agents-with-queues/

Best Practices

Pitfall	Example Use Case	Best Practice
Customers become frustrated because they can't find the types of requests they want to create.	Customers are logging many 'Get IT Help' requests instead of using more appropriate requests like 'Oauth authorization problem' or 'SSO verification failure'.	Use intuitive request type names and short helpful descriptions to make it easier for your customers to find the right type of request to create.
Customers won't create requests.	Customers refuse to fill out the 'Need new monitor' form that has 10 required fields because it takes too long!	Keep your request forms simple and straightforward to make it easy for customers to create requests.
Critical issues are not being resolved fast enough.	Agents are not finding critical issues easily because they are getting lost amongst the large number of non-critical issues in very large queues.	Create queues to make it easier for agents to prioritize their work.
Users are having problems searching	You changed the default project key from DEV to DEVLMNT.	If you change the default project key, choose a key that is descriptive and easy to type.

Pitfall	Example Use Case	Best Practice
for issues in your project.		Users will often use the issue key to find an issue and you want to make it as easy as possible for them so don't use overly long keys.

Lab 4 Configuring SLAs

In this lab, you will:

1. Configure SLAs
2. Create an SLA monitoring dashboard

Lab 4 Exercise 1 Configuring SLAs

Customize an SLA

1. Log in as the IT Services project administrator, **Al**.
2. Navigate to the IT Services project's **Project settings**.
3. Click **SLAs** in the sidebar.
    - **Note:** Here you will see the four pre-configured SLAs.
4. Click the arrow on the right-hand side of the **Time to resolution** tab to view the SLA's settings**.**
    - **Note:** The SLA goal for service requests is 8 hours and it starts measuring time when the issue is created, or the issue is re-opened (resolution is cleared). The SLA goal for incidents is 4 hours.
5. In the **Time to resolution** SLA, we need to add a new goal for urgent incidents. Click **Edit** on the right of the tab.
6. Your IT team has an SLA, in which urgent incidents should be resolved within 2 hours, regardless of the time of day or the day of the week. To set this up, click the **plus icon** at the bottom of the list of Goals and, in the new goal (second from bottom), enter this information:
    a. Time Goal**: 2h.**
    b. Calendar: **Default 24/7 calendar.**
    c. Issues to display (in JQL): **"Ticket category" = Incidents AND Urgency = Critical.** **Note**: Urgency may appear as "Urgency[Dropdown]".
    d. Click **Save**.
        - **Note:** You can have separate calendars for each goal. In this example, you have a 24/7 calendar for urgent incidents and a 9-5 calendar for all other issues.
    e. Drag and drop your new goal to the top of the **Goals list.**
        - **Note**: If you moved the new goal to second in the list, then the urgent incident SLAs would incorrectly show as 4 hours. Issues are checked against the list from top to bottom and are assigned the time target based on the first matching JQL statement. Since urgent incidents would meet the goal of 'issuetype = incident', the SLA would be set to 4 hours. Make sure that your new goal is at the top of the list so it will be checked first.
7. Click **Save** at the bottom of the **Time to Resolution** SLA.
    - **Note**: Service Management will now recalculate existing issues in the project using this new goal.

Verify your customized SLA

1. Click **Back to project.**
2. From the project sidebar, click on **Channels** and then select **PORTAL** and click **Open.**
3. Click **Common Requests** and then **Report a system problem**.

a. Create the request:
    i. Summarize the problem: **Test urgent incident.**
    ii. Describe what happened and how it occurred: **No internet access.**
    iii. How urgently does this need to be fixed?: **Critical.**
    iv. Click **Send**.
b. Return to the project and view your **Queues**. You should see the urgent incident in the **All open tickets** queue.
c. Click the issue key or summary to open it.
d. The **Time to resolution** shows within the issue and you can see the SLA is now set to **within 2 hours** which confirms the SLA is set up correctly.

Create a new SLA

ⓘ Your IT team wants to ensure service requests that require approval don't sit waiting for approval for more than 6 hours, so let's create a new SLA. Before we create it though, we need to familiarize ourselves with the workflow associated with this request type.

1. In **Project settings**, navigate to the **Workflows** page.
2. Click the diagram link next to **IS: Service Request Fulfilment with Approvals workflow for Jira Service Management** to view the workflow.
3. Answer the questions below:
    - **Question:** When a service request requiring approval is created, what status is it automatically in?
    - **Answer**: As soon as a service request requiring approval is created, it goes into the **WAITING FOR APPROVAL** status.
    - **Question:** Once a service request requiring approval leaves the **WAITING FOR APPROVAL** status what status can it go to next?
    - **Answer**: Once a service request requiring approval leaves the **WAITING FOR APPROVAL** status it can go to either the **CANCELED**, the **WAITING FOR SUPPORT**, or the **RESOLVED** status.
4. Click **Close.**
5. Return to the **SLAs** page.
6. To create a new SLA, click **Add SLA** on the right-hand area of the SLA page.
7. Click the dropdown next to the clock icon and select **Time waiting for approval.**
8. Goals:
    a. Select the **plus icon** to add another goal at the bottom of the goals list.
    b. Time Goal: **6h.**
    c. Calendar: **Sample 9-5 Calendar.**
    d. Issues to display (in JQL): **issuetype = "[System] Service Request with Approvals"** **Note**: If you enter an issue type with spaces, you need to surround the name with quotes.
    e. Click **Save.**
9. Conditions:

a. Beneath **Start counting time when...**, click the plus icon and select **Entered Status: Waiting for approval**. Be careful not to confuse it with the status Awaiting approval or Waiting for support.
b. **Pause counting time during...**: leave empty.
c. For **Finish counting time when...**, repeatedly add the conditions:
    i. **Entered Status: Resolved**.
    ii. **Entered Status: Waiting for support**.
    iii. **Entered Status: Canceled.**
d. Click **Save**.

Verify your new SLA

1. Return to the customer portal.
    a. Go to the **Computers** group, scroll down and click **New mobile device**. This request type is based on the Service Request with Approvals issue type.
    b. For the new request enter:
        i. Summary: **New mobile phone for Al**
        ii. Who is your manager?: **Jo**
        iii. Click **Send**.
    c. Return to your **service project tab**.
    d. Log out and back in as the approver **Jo**.
    e. Navigate to the **IT Services** project queues and open the new issue. Your new SLA should among the two SLAs with a time waiting for approval 6h. The status of the service request is **WAITING FOR APPROVAL**.
    Note: There is an option to approve the issue here by clicking **Approve** at the top of the issue, but let's see how easy it is to approve in the portal.
    f. Navigate to the help center view and click **Requests** on the top right. You should see a dropdown with a 1 next to **Approvals** indicating you have one request to approve. Click **Approvals**.
    g. On the Approvals page, open the request.
    h. Click **Approve**.
    i. Return to the issue in your service project and refresh the page. In the SLAs panels in the issue, you will see a green checkmark next to the **Time waiting for approval** SLA, indicating that it has been met. The workflow status is now **Waiting for support**.

Lab 4 Exercise 2 Creating an SLA monitoring dashboard

Create a search filter

First, we create the filter that will be used in the gadget.

1. Log in as **Al**, the service project administrator.
2. On the top menu, click **Filters** and select **View all issues** or **Advanced issue search**.
    a. If you don't see the JQL entry field, click **JQL** or **Switch to JQL** on the right.
    b. Clear the JQL if not empty and enter: **project = "IT Services" AND "Time to resolution" < remaining(2h) AND "Time to resolution" != everBreached()**
        - **Question:** What issues will this JQL return?
        - **Answer:** This JQL will return all issues in the IT Services project that have less than 2 hours remaining on the 'Time to resolution' SLA and this SLA has not been breached.
    c. Click **Search**. You should see your 'Test urgent incident' here from the last exercise (if it was done less than 2 hours ago).
    d. Click **Save filter** or **Save as** at the top of the page and name the filter **Less than 2h on Time to resolution SLA**. Click **Save** or **Submit.**

Create a dashboard

Now we create the dashboard that will display the filter gadget.

1. On the top menu, click **Dashboards** and select **Create dashboard**.
    a. Create the new dashboard and share it with everyone who can browse the project:
        i. Name: **SLA Monitor**
        ii. Description: **Dashboard to monitor SLAs**
        iii. Viewers: Select **Project**, **IT Services**, then click **Add**.
        iv. Click **Save.**
    b. Click **Dashboards** from the banner and you will see the dashboard listed in your Starred dashboards.

Create a gadget

Finally, we create the gadget (based on the filter) on the dashboard.

On your new **SLA Monitor** dashboard:

1. Click **Edit.**
2. If needed, click **Add gadget**.
3. In the **Add a Gadget** panel, which displays on the right, type **Filter Results** in the search gadgets text field.

a. When the **Filter Results** gadget is displayed in the **Add a Gadget** panel, click **Add**. The gadget should now appear in your dashboard.
This gadget shows the issues/results for a saved filter.
b. Configure the **Filter Results** gadget:
    - Saved Filter: Search for and select your filter, **Less than 2h on Time to resolution SLA.**
    - Number of results: leave as **10**.
    - Scroll down to the **Drag-drop to reorder the fields** section and click the arrow on the right-hand side until you see a list of field names.
        - Search for and then select **Time to resolution** so that displays in the **Columns to display** section.
        - Search for and then select **Time to first response** so that displays in the **Columns to display** section.
        - Drag both of these columns until they are listed below Key.
    - Auto refresh: Check **Update every 15 minutes**.`
c. Click **Save**.
d. Click **Done.**

4. You should now see your new gadget showing the urgent incident you created in Exercise 1 of this lab. If it's been more than 2 hours since you created that incident, then create a new urgent 'Report a system problem' incident. If you need help, follow the instructions in Exercise 1, Step 2.

Congratulations on completing the lab!

Lab 4 Appendix

Further reading

Reference	URL
Creating and managing SLAs	https://support.atlassian.com/jira-service-management-cloud/docs/create-service-level-agreements-slas/

Best Practices

Pitfall	Example Use Case	Best Practice
Customers are upset because you didn't meet the level of service you promised them.	Your agents missed your commitment to customers to resolve their critical incidents within 4 hours three times last week.	Create SLAs and goals to keep track of the commitments you've made to your customers.

Lab 5 Using a knowledge base

In this lab you will:

1. Use a knowledge base
2. Verify knowledge base integration for customers
3. Verify knowledge base integration for agents

Lab 5 Exercise 1 Using a knowledge base

ⓘ A Confluence knowledge base linked to your service project can help customers find solutions immediately and also help to deflect requests from your team.
When a Jira administrator creates a Service project, a space with the same name is created automatically in Confluence.

Using a Knowledge Base

1. Make sure you are logged in as **Al**.
2. Click **Knowledge base** in the IT Services project's sidebar.
   Note: If the knowledge base space isn't linked, you may need to Link Space in the Knowledge Base project settings.
   a. Click **Create article** on the right-hand area of the screen.
      Note: A new browser tab may open with the Confluence create page dialog or the page may appear within Jira.
   b. If the option appears for which type of article to create, select **How-to article** and if necessary, click **Create.**
3. Name your article **How to share Google calendars**
   a. Click **Publish.**
4. If needed, return to Jira and the IT Services project in your original browser tab.
   a. On the **Knowledge base** page, click **New category** located in the sidebar.
   b. Name it **Google settings.**
   c. Add description **Find out how to set up your Google apps.**
   d. Click **Create.**
5. Add the newly created article to the category:
   a. Click **Add article.**
   b. Click the **plus icon** next to the **How to share Google calendars** article so that you see a green checkmark.
   c. Click **Back to category.**

Verify Knowledge Base integration for customers

1. Navigate to your customer portal in a separate browser tab (via **Channels** and **PORTAL** in **IT Services**).
2. Under Learn more about, select **Google settings.**
   a. Click **How to share a google calendar.**
3. Say your customer with the calendar problem didn't want to do a search and instead just wanted to create a request, click the **Need to raise a request? Contact us** link.
   a. Click **Common Requests.**
4. Click **Get IT help** and enter a summary of **How do I share my Google calendar**.
   a. Note the article you created is now suggested.

b. Click **Send**.

Verify Knowledge Base integration for agents

1. Go to your service project queues and open the **How do I share my Google calendar** ticket.
2. On the right-hand side panel, find the **knowledge base** field.
    a. Click the **Related articles** link.
    b. Here you'll see the article you just created.
    c. Open the **How to share Google calendars** article to verify it's working.

Congratulations on completing the lab!

Lab 5 Appendix

Further reading

Reference	URL
Setting up a knowledge base	https://support.atlassian.com/jira-service-management-cloud/docs/set-up-a-knowledge-base-so-customers-can-serve-themselves/

Best Practices

Pitfall	Example Use Case	Best Practice
Your customers have to wait to get an answer to their problem.	Janet is working from home and needs VPN access to work on a critical bug, but she has to wait for an agent to get back to her about her VPN problem.	Link a Confluence knowledge base to your service project to help customers find solutions immediately and also to help to deflect requests from your team.
Your agents are overwhelmed by the volume of requests coming in.	Different customers logged the same email setup request 10 times this week!	Link a Confluence knowledge base to your service project to help agents find solutions quickly and give them a fast way to turn requests into knowledge base articles (which will help deflect the same requests in the future).
Customers still ask for help when there's already a knowledge base article.	Many customers are raising requests for help with setting up their mail accounts on mobile devices.	Regularly review the knowledge base articles to ensure they are still accurate and appropriate.

Lab 6 Branding your customer portal

In this lab you will:

1. Brand your customer portal
2. Optionally, brand your help center
3. Optionally, change your project logo

Lab 6 Exercise 1 Branding your customer portal

Brand your customer portal

Note: For this lab, you need one of the lab resource files, lifering.png. If you don't have this file, you can use a small image of your own.

1. Make sure you are logged in as **Al** in the **IT Services** project.
2. Click **Project settings** in the sidebar and then click **Portal settings**.
    a. Add a logo to make the service project easier to recognize:
        i. Click **Add logo**.
        ii. You can either drag and drop **lifering.png** or your own image in the dialog or select **Upload a photo**.
        iii. If you selected to upload the file, navigate to the location on your local machine where **lifering.png** or your own image is located and open it.
        iv. Click **Upload.**
3. In the **Introduction text** field, add the following sentence**: or use search to quickly find solutions**.
   The full Introduction text should read: **"Welcome! You can raise a request for IT Services using the options provided or use search to quickly find solutions."**
4. Click **Save**.
5. Finally, add an Announcement that shows the hours your service desk is open:
    a. Under Announcements, click **Manage portal announcements**.
    b. This opens a new browser window with the customer portal and here you can add and edit announcements. In the **Portal announcement** panel that appears on the right side enter the following:
        - Message title: **Hours of operation**
        - Message: **Mon – Fri: 9am to 5pm**
    c. Click **Save changes**.

Congratulations on completing the lab! If you have time for the optional exercises, go to the next page.

Lab 6 Optional Exercise 2 Branding your Help Center

Brand your help center

> ⓘ Only Jira administrators can brand the help center, as it's a global page. This can be done from Jira administration in Products, Jira Service Management configuration. But here we'll do it from the project.

1. Return to your project window and log out and back in as **Jo**, the Jira administrator.
2. Return to the **IT Services** project **Portal settings** page.
3. Under **Customize your help center**, click **See help center customization options.**
4. Brand your help center by adding a logo and changing the theme colors:
    a. Click, **Customize look and feel.**
    Note: Depending on the width of your screen, you may not need to click **Customize look and feel**. If your screen is narrow, the panel may appear at the top and automatically display.
    b. Select **Add logo**.
    c. Navigate to the location on your local machine where you saved your lab resource files and open **tickets.png**. (If you don't have this file, you can use a small image of your own.)
    d. Click **Save changes**.
        i. You now see the logo appear on the left of your top banner on your help center, if not refresh your page.
    e. Click **Customize** on the right to reopen the edit pane and navigate back to **Customize look and feel**.
    f. Now we'll change the color of the banner background, links, and buttons color. Click the **color square** under **Banner background, link and button color,** and set it to **#5243aa**. Alternatively, choose your own color.
    g. Click **Choose**.
    h. Click **Save changes**.
5. On the Help Center, click **IT Services** and note the new theme appears along the top of this customer portal (as it will for any new service projects on this instance.)
    - **Note**: If you wished to return the banner color to the default, it is #0074e0.

    Congratulations on completing the lab!

Lab 6 Optional Exercise 3 Changing your project logo

1. Change the project logo for your project so it's easily recognizable for agents:
    a. From your **IT Services** project, log out as **Jo** and back in as **Al**, the service project administrator.
    b. Navigate to the IT Services project's **Project settings**.
    c. On the **Details** page, for Avatar, click **Change icon**.
    d. You can also upload your own image file to use as a project avatar if you wish by clicking **Upload a photo**.
    e. Go back and click the **ellipsis** (**...**) to see more options. Select the lifering icon to match your customer portal branding.
    f. Click **Select** and then click **Save** at the bottom of the page.

Now your agents see the new project avatar at the top of the project sidebar that matches the customer portal logo.

Congratulations on completing the lab!

Lab 6 Appendix

Further reading

Reference	URL
Customizing the customer portal	https://support.atlassian.com/jira-service-management-cloud/docs/customize-the-look-and-feel-of-your-help-center-and-portal/

Best practices

Pitfall	Example Use Case	Best Practice
Customers cannot easily find your customer portal on the Help Center.	You have 20 customer portals in your organization many with similar names and no logos.	Brand your customer portal so your customers can easily associate your service project with your team when they create requests.

Lab 7 Adding participants to your Service project

In this lab, you will:

1. Add users to your service project
2. Adding customers to your service project

Lab 7 Exercise 1 Adding users to your service project

Invite your team to your service project

1. Ensure you're logged in as **Al**, the service project administrator in the **IT Services** project.
2. In the project sidebar, click **Invite team**.
3. Enter and select **Vi** and click **Invite 1 person.**
    a. You see a confirmation message showing “Success! Your invitation has been sent”.
    b. Vi is already a user on this site. If she wasn’t, you could enter her email address and she’d be sent an invitation to join the site.
4. Navigate to **Project settings** and click **People**.
    a. Here you see the agent, Vi, you added to the Service Desk Team project role.

Add Jira Software developers to your service project

1. From the People page, click **Add people**.
2. Enter and select **Bo**.
    - Bo is a Jira Software developer who will collaborate with your agents.
3. Select the **Service Desk Team** role and click **Add**.
4. Now you see a list of four users:
    a. **Al** was granted the **project administrator's** role in an earlier lab.
    b. **Bo** was granted the **Service Desk Team** role in the **People** area of project administration.
    c. **Jo** was automatically added as a **project administrator** because she created the service project.
    d. **Vi** was added via the **Invite Team** menu**.** She’s an agent. She could have been added here instead.
        - **Note**: Even though Bo and Vi both have the Service Desk Team role, they have different access to your service project because of their product access. Bo has restricted access to your service project issues because he doesn’t have a Service Management license.

Lab 7 Exercise 2 Adding customers to your service project

View customer permissions

1. Log out and back in again as **Jo**. We'll be viewing pages in Jira administration so we need to be logged in as a Jira administrator.
2. From your **IT Services** project, click **Customers** in the project sidebar to view your customer list.
3. Your current settings are: "Anyone can raise a request in this service project". To find out what this means, click **Change permissions**.
    - **Note:** On the Customer permissions page, you can see that **Service Project Access** is open to **Anyone allowed on the customer access settings**. If you wanted to limit this to only people with accounts on your site or allow anyone on the web, you would need to ask a user with Jira Administrators global permission to change **Global settings**.
4. From the **Service project access** section, click the **update the customer access settings** link. This opens a new tab called **Customer access**.
    - **Note**: You can see the **Allow customers to create accounts** option has been selected, so that customers can create accounts by signing up or by sending a request.
    - **Note** that customers cannot access and send requests from the help center unless they log in as that option is not checked.
5. Return to the **Customer permissions** browser tab.
6. Click **Back to project**.
7. In the project sidebar, click **Customers**.

Set up an organization

1. On the Customers page, click **Add organizations** on the right.
2. Enter **Remote**, select **Remote (create new)**, and click **Add**.
    a. The new organization now appears at the top of your customer list.
3. Click **Add customers** on the right.
4. Type **li@atlassian.university**, select the **Remote** organization, and click **Ok**.
5. Click the name of the organization, **Remote**, in the customer list and you will see the user you just added.
   You may need to press refresh to see the changes.

Verify your users have the correct access to your service project

1. Create a new request as a customer:
    a. Open the customer portal in a new browser tab (or return to the one you already have open).
    b. From the customer portal, log out then back in as **Li**.

   i. If prompted, click **Log in with single sign-on**.
   ii. **Note**: For this exercise, we assume the customer has already created their account.
c. From the Help Center, open the **IT Services** customer portal.
d. If you did the earlier lab to set up the Knowledge Base, click **Need to raise a request? Contact us**.
e. Select **Common Requests**.
f. Click **Report a system problem**.
   i. Summarize the problem: **Transporting from the Medusa Nebula is slow**.
   ii. Describe what happened: **Transporting is taking 20,000 light-years.**
   iii. Click **Send**.

2. Assign yourself a request as an agent:
   a. Navigate back to the projects browser tab.
   b. Log out and back in as **Vi**, the service agent.
   c. Navigate to the **IT Services** project.
   d. From the **Queues** page, open the request the customer, Li, created.
   e. Click the Assignee field on the right and select **Assign to me**.
3. Link the request to a Bug and add a note:
   a. Click **Link issue** or the link icon (underneath the issue summary).
   b. Under Linked Issues, click the **drop down**, scroll down and select **relates to.**
   c. For the issue, start typing **SA** then select **SA-1.**
   d. Click **Link** and you see the link to the bug appear in the issue**.**
   e. Under Activity, click **Add internal note** and enter **Please notify me when this bug is fixed.**
   Note: If you don't see this option and can type in a box under **Activity** click cancel to see the **Add internal note** option.
   f. Click **Save.**
4. Add a comment as a Jira Software developer:
   a. Log out and back in as **Bo**, a developer.
   If you see any onboarding questions you can skip these.
   b. Navigate to the **IT Services** project.
   Bo can only see the issues in the project and no queues, or other features of Jira Service Management as he does not have a Jira Service Management license.
   c. In the **Search** in the Application header, search for **SA-1**.
      i. In this bug, you see the linked service project issue. Click this and you're taken to the service project issue.
      ii. Add an internal note **This bug has been fixed and will be in the update tomorrow.**
      iii. Click **Save**.
   d. View the comment as the agent:
      i. Log out and back in as the agent, **Vi**.
      ii. In the IT Services All open tickets queue, open **Li'**s issue.
      iii. Scroll down to view **Bo**'s internal comment. **Vi** can now contact the customer with the news and resolve her issue!

Congratulations on completing the lab!

Lab 7 Appendix

Further reading

Reference	URL
Setting up service project users	https://support.atlassian.com/jira-service-management-cloud/docs/set-up-service-project-users-to-work-on-requests/
Permissions for your service project	https://support.atlassian.com/jira-service-management-cloud/docs/customer-permissions-for-your-service-project-and-jira-site/

Best practices

Pitfall	Example Use Case	Best Practice
Lack of collaboration between service and development teams means issues take longer to resolve.	Agent Sue has an issue that is related to a bug but the engineer working on the bug is not responding to her emails, so she doesn't know the bug has already been resolved.	Add Jira Software and/or Jira Work Management users who will be collaborating with your team to the Service Desk Team role for your service project, so they can access the project. This way they can provide your team members information directly in their linked issues to resolve issues faster.
Agents incorrectly enter comments as internal/ customer facing.	A comment was entered for the developer to respond but was inadvertently entered as a customer comment.	Agents should be careful to check which type of comment they are entering.

Lab 8 Automating your service project

Estimated time: 35 minutes

In this lab, you will:

1. View Jira preset automation rules
2. Creating an automatic approval automation rule
3. Setting up an automation rule for urgent incidents
4. Troubleshooting automation rules & SLAs

Lab 8 Exercise 1 View Jira preset automation rules

1. Log in as **Al**.
2. Navigate to the IT Services project's **Automation** project settings page.
    - **Note**: Click **Automation**, NOT Legacy automation.
3. Explore the **Templates** tab.
    - **Note**: Here you see all the preset rules specific to a Jira Service Management project. You can enable a rule and use it immediately or edit it to suit your needs.
4. Click the **Rules** tab.
5. View Service Management triggers and actions:
    a. Click **Create rule** from the top right-hand side.
    b. Click **Skip tour.**
    c. Scroll down to the **Issue triggers** section and click **SLA threshold breached**.
    d. Click the SLA dropdown and select any SLA.
        - **Note:** This trigger can be used to trigger automation when an SLA is breached, is about to breach, or has breached in the past.
    e. Click **Save** or **Next**.
    f. Click **THEN: Add an action**.
    g. Scroll down to the **Jira Service Management** actions and explore the options available.
        - **Note:** These actions can be used to perform actions such as adding a Jira Service Management customer to the project, approving or declining a request, or creating a new request in another service project.
    h. Scroll back up and click **Return to list** or **Return to rules**, then in the pop-up prompt click **OK** to discard the new rule.

Lab 8 Exercise 2 Creating an automatic approval automation rule

ⓘ Some service requests require approval from a manager, for example requesting a new mobile device. Here we'll create a rule that automatically approves new mobile device requests if the user is an administrator.

Create a new automation rule

1. On the Automation page, click **Create rule**.
2. For the trigger, click **Issue created** and then click **Next**.
3. Create a condition that passes if this is a new mobile device request:
    a. Click **IF: Add a condition**.
    b. Click **Issue fields condition**.
    c. For **Field**, select **Request Type** (near the end).
    d. For **Condition**, select **equals**.
    e. For **Value**, select **New mobile device**. This is a request type that requires approval.
    f. Click **Next**.
4. Create a condition that passes if the reporter is an administrator, that is, a Jira or Confluence administrator:
    a. Click **IF: Add a condition**.
    b. Click **User condition**.
    c. For **User**, select **Reporter**.
    d. For **Check to perform**, select **is in group**.
    e. For **Criteria**, select **administrators**.
    f. Click **Next**.
5. Create an action that approves the request:
    a. Click **THEN: Add an action**.
    b. Scroll down and, in the **Jira Service Management** section, select **Approve/Decline request**.
    c. For **Approval decision**, select **Approve**.
    d. Click **Next**.
6. Verify your automation rule now lists the following:
    a. **When: Issue created**
    b. **(If:) Request Type equals**
    New mobile device
    c. **(And:) Reporter is in**
    administrators
    d. **(Then:) Approve/Decline request**
    Approve
7. On the right, click **Turn on rule**, name your rule **Approve mobile devices for admins** and confirm by clicking **Turn on rule**.

Verify the automation rule

1. Create a new request:
    a. Since **Al** is not a Jira administrator, we'll log out as **Al** and back in as the Jira administrator, **Jo**.
    b. Navigate to the **IT Services** project.
    c. In the **Project settings** sidebar, click **Portal settings**.
    d. Copy the **Portal URL** and open the link in a new browser tab. This takes you to the customer portal. This is another way to get to the customer portal (other than using **Channels** in the project).
    e. If you completed the Knowledge Base lab earlier, click **Need to raise a request? Contact us**.
    f. Click **Computers**.
    g. Click **New mobile device**.
    h. For Summary, enter **I need a new phone**.
    i. For who is your manager?, select **siteadmin**.
    j. Click **Send**. In the issue, there's an automatic response that indicates approval is needed.
2. Verify the request was approved:
    a. Return to the **IT Services** project browser tab.
    b. Return to the project to the **All open tickets** queue.
    c. Click the new request's key or summary to open the request.
        i. If you don't see the issue, refresh the window.
    d. Look at the **Activity** and you should see **Status approved**.
        i. No response was needed by the siteadmin as the approval was done automatically.
    e. View the workflow status in the upper right, **Waiting for support**. It is no longer in the **Waiting for approval** status.
    f. Click the status dropdown and select **View workflow**.
        i. You can see that the issue has passed the **WAITING FOR APPROVAL** status.
    g. Close the workflow window.

View the audit log

1. Click **Back to Project** then **Project settings**.
2. Click **Automation**.
3. Click the **Audit log** tab in the upper left.
4. Find the automation that you created in the previous step (**Approve mobile devices for admins**). In the status column, you should see the status of SUCCESS.
5. At the end of the top row, click **Show more**.
    a. Here you see the details of your automation rule execution. Note that the final action detail shows the approval has been completed.

Optionally, test the rule as a user who is not an administrator

1. Navigate to the customer portal.
2. Log out and back in as **Vi**, the service agent.
3. In the IT Services customer portal, create a new request for a mobile device (under Computers), specifying **Jo** as the manager.
4. Log out and back in as **Jo**.
5. View the new request and confirm the request was not automatically approved. The status should be **Waiting for approval**.

Congratulations, you have created an automation rule that automatically approves administrator requests for new mobile devices.

Lab 8 Exercise 3 Setting up an automation rule for urgent incidents

ⓘ In this lab, you'll add an automation rule to set customer expectations regarding incident resolution. For urgent incidents, comments are added automatically indicating they will be resolved within 2 hours. For all other incidents, comments are added indicating they'll be resolved within 4 hours.
In lab 4 you configured a new goal for the Time to resolution SLA. You set it up so urgent incidents should be resolved in 2 hours. There was already a goal for all incidents to be resolved in 4 hours.

Set up a new automation rule

1. Log in as **Al**, the project administrator, and navigate to the **IT Services** project.
2. On the **Automation** project settings page, click the **Rules** tab.
3. Click **Create rule**.
4. If prompted with a tutorial, click **Skip tour**.
5. For the trigger, click **Issue created** and then click **Next**.
6. Create a condition that passes if the issue type is Incident:
    a. Click **IF: Add a condition**.
    b. Select **Issue fields condition**.
    c. For **Field**, select **Issue Type**.
    d. For **Condition**, select **equals**.
    e. For **Value**, select **[System] Incident**.
    f. Click **Next**.
7. Create the if else condition:
    a. Click **IF: Add a condition**.
    b. Select **IF / ELSE: add condition options** block.
    c. Click **Add conditions...**
    d. Select **Issue fields condition**.
    e. For **Field**, select **Urgency**.
    f. For **Condition**, select **equals**.
    g. For **Value**, select **Critical**.
    h. Click **Next**.
8. Create new action for the condition:
    a. Click **THEN: Add an action.**
    b. Select Issue actions: **Comment on issue.**
    c. For comment, add: **We will work to resolve your urgent incident within 2 hours!**
    d. Click the **Comment Visibility** dropdown, select **Share with customer**.
    e. Click **Next**.
9. Create the else condition:
    a. On the left, click **Add else**.
    b. Click **Add conditions...**

    c. Select **Issue fields condition**.
    d. For **Field**, select **Urgency**.
    e. For **Condition**, select **does not equal.**
    f. For **Value,** select **Critical**.
    g. Click **Next**.
10. Create new action for the else condition:
    a. Click **THEN: Add an action.**
    b. Issue action: **Comment on issue.**
    c. For comment: **We will work to resolve your incident within 4 hours!**
    d. Click the **Comment Visibility** dropdown, select **Share with customer**.
    e. Click **Next**.
11. On the right, click **Turn on rule**, name your rule **Set Customer Expectations** and confirm by clicking **Turn on rule** again.

Verify your automation rule

1. Navigate to the Help center and create a new issue.
2. Select **Common Requests** and then **Report a system problem**.
    a. Summarize the problem: **Urgent incident test.**
    b. Describe what happened and how it occurred: **Urgent incident test.**
    c. How urgently does this need to be fixed?: **Critical**.
    d. Click **Send**.
3. Refresh the page and you should now see your incident with the comment added from your automation rule specifying a resolution within 2 hours.
4. Create another new issue that's less urgent:
    a. Click **IT Services** above the issue summary to return to the IT Services customer portal.
    b. Create another issue selecting **Common Requests** and then **Report a system problem**.
    c. Summarize the problem: **Medium urgency incident test.**
    d. Describe what happened and how it occurred: **Medium urgency incident test.**
    e. How urgently does this need to be fixed?: **Medium**.
    f. Click **Send**.
5. Refresh the page and you should now see your incident with the comment added from your automation rule specifying a resolution within 4 hours.
6. If you didn't see these results, re-edit your new automation rule and check all the conditions and actions.

Congratulations, you have created an automation rule that sets customer expectations regarding incident resolution.

Lab 8 Exercise 4 Troubleshooting automation rules & SLAs

ⓘ This exercise requires all previous exercises in this lab to have been completed. Here we will consider the interplay of automation rules and SLAs.

Test the 'Time to first response' SLA

1. Make sure you are logged in as **Al** and navigate to the **IT Services** project.
2. If you completed the previous exercise, open either the **Urgent incident test** or the **Medium urgency incident test** incident.
3. If you didn't complete the previous exercise, raise a new request of type **Report a system problem** instead.
    a. Enter a summary, **Urgent SLA test.**
    b. Enter a description, **Urgent SLA test.**
    c. Set the urgency to **Critical**.
    d. Click **Send**.
    e. Return to the **IT Services** project and open your new issue.
4. View the **Time to first response** SLA.
    - **Question**: Why has the time to first response SLA been met?
    - **Answer**: The time to first response SLA was met because:
        - The Set Customer Expectations automation rule added a public comment to the request as soon as it was opened, telling the customer when they should expect a resolution.
        - As soon as the public comment is added, the time counter stops for the 'Time to first response' SLA and the SLA is met.
        - This all happened as soon as the issue was opened so the 'Time to first response' SLA is met immediately.

Congratulations on completing all the labs!

Lab 8 Appendix

Further reading

Reference	URL
The basics of automation	https://support.atlassian.com/jira-service-management-cloud/docs/learn-the-basics-of-automation/

Best Practices

Pitfall	Example Use Case	Best Practice
Wasting time!	You spent hours creating a complex automation rule for your project only to discover that there was already a preset rule that did almost exactly what you wanted.	Familiarize yourself with the preset rules and if one of these closely matches what you need, then it may be less work to modify that than to create a new one.
Many SLAs are being breached.	Your team is often missing SLAs. Create an automation rule to notify them when an SLA is at risk.	Create automation rules that are triggered by SLAs (or customize the preset 'Keep on top of SLAs' rule) to ensure you meet your SLAs.
The SLAs for many issues were recalculated when they shouldn't have!	To test a new automation rule that fires when the Time to Resolution SLA is breached, you shortened this SLA. But this resulted in all the current issues' SLAs being recalculated.	If you need to adjust your SLAs simply to test a new automation rule, run the test on a testing system.
My SLAs are being met when they shouldn't be.	You create an automation rule that comments publicly letting the customer know when they will get a response. However, adding that comment met the	You need to consider the interplay of different automation rules and the way SLAs are set up, when you

Pitfall	Example Use Case	Best Practice
	Time to First Response SLA when it shouldn't have.	create automation rules that involve SLAs.