ATLASSIAN University

Atlassian Service Request Management Essentials

Lab Workbook

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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 each user's email address 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.

You'll log in as different users throughout the course. Here's a list of the users and what role they'll have.

Name	Role
Tala Ruiz	Jira and service project administrator
Kevin Campbell	Service agent

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 - Introduction to Service Request Management

Estimated time: 20 minutes

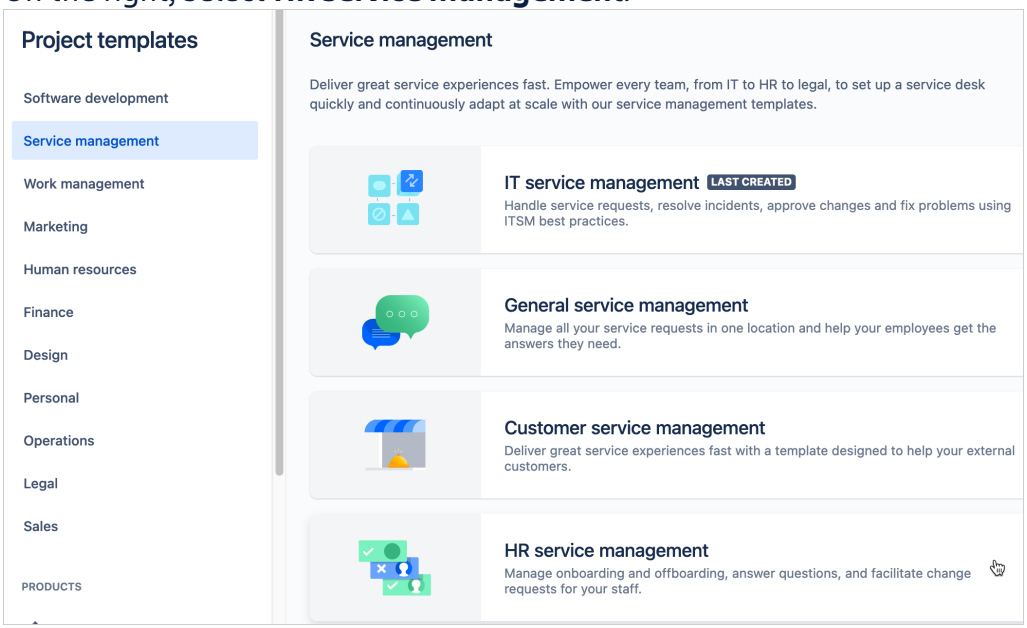
In this lab, you will:

1. Create a service project
2. Create and view a service request

Exercise 1 - Create a service project

1. Log in as the Jira administrator, **Tala Ruiz**.

   Note: Do NOT access using a Google, Microsoft or Apple account. Use the email provided to you for this course.
2. In the top menu, click the **Projects** dropdown and select **Create project**.
3. If you see the **Project templates** screen, follow these instructions (if you see the **Create project** screen, skip to step 4):
   a. In the sidebar, select **Service management**.
   b. On the right, select **HR service management**.



   c. Read the information on this template if you wish.
   d. Click **Use template**.
   e. If you're asked to choose, click **Select a company-managed project**.
   f. For Name, enter **Human Resources**.
   g. For What team is this for? or Team type select **Human Resources (HR).**
   h. Leave Key and 'Share settings with an existing project' at the defaults.
   i. Click **Create project**.

4. If you see the **Create project** screen:
   a. For Name, enter **Human Resources**.
   b. Click **Change template**:
      i. Near the top of the page click the dropdown and select **Service project**.
      ii. Select the **HR Service management** template.
   c. Leave Key and 'Share settings with an existing project' at the defaults.

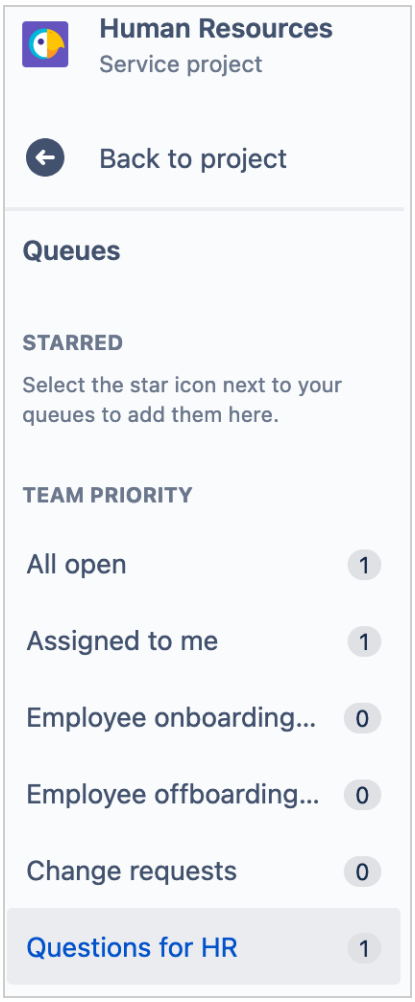
d. Back on the Create project page, click **Create**.

5. If you're prompted to take a tour of the project and you want to, click **Take the tour**. If you don't want to take the tour, click **Explore by myself**.
6. Here you see the **All open** requests queue. You don't have any requests so nothing shows here yet.

Exercise 2 - Create and view a service request

ⓘ Customers create service requests and other requests on the customer service portal. You could create a request from the project but let's experience what a customer sees.

1. Create a service request in the customer service portal:
    a. In the project sidebar, click **Channels**.
    b. Mouse over **PORTAL** and click **Open**. A new browser tab opens displaying your customer portal for this project.
    Note: Here you see the different request types that come with this project template - Employee onboarding, Employee offboarding, Change request, and Questions for HR.
    c. Select the **Questions for HR** request type.
        i. For 'What is your question...' enter a question like **Where do I find the leave policies?**
        ii. For Description, enter any text or repeat the question.
        iii. Click **Send** and you see your service request as a customer sees it.
2. View service request queues:
    a. Return to your project tab and you should see your request in the **All open** queue. This is what the service agent sees.
        i. If you don't see your new service request, refresh the page.
    b. If you don't see all the queues in the sidebar, click **Queues**.
    Note: In the sidebar, you see different queues for all open requests, requests assigned to me, and each request type. They're all empty except for the All open and Questions for HR queue.
    c. Click the **Questions for HR** queue and you see your service request.
    Note: On the right, you see the SLA, **Time to resolution**, so the agent knows how long they have to resolve the service request.
3. View the request and assign it to yourself:
    a. Click the request's key or summary to view the details.
        i. If you're prompted, optionally take a tour or dismiss the dialog.
    b. Click in the **Assignee** field and assign it to yourself, **Tala Ruiz**. If available, you can also use the **Assign to me** button.
    c. Look at the sidebar. The **Assigned to me** queue should now have the number **1** next to it.
        i. If you still see 0, refresh the page.



   d. You also see the Time to resolution SLA in the request.
   e. In the top right of the request, click the **To Do** (the status of the request) dropdown and select **View workflow**.
      i. Here you see the simple workflow for this request type.
      ii. Click **Close**.
4. Resolve the service request:
   a. Typically we'd wait for confirmation from the customer that their request has been met but for this exercise, we'll close it now. Above the issue details on the right, click the **To Do** dropdown and select **Start**.
   b. Click the **In Progress** dropdown and select **Resolved**.
   c. On the Resolved dialog, for Resolution, select **Done**.
   d. Optionally, enter a comment to respond to the customer, for example, **You'll find all leave policies in the Leave section of the HR website.**
   e. Click **Resolved**.
   f. Verify that the All open, Assigned to me, and Questions for HR queues are empty.

i. If you don’t see this, refresh the page.

Congratulations on completing the lab!

Lab 3 - Setting Up a Knowledge Base for Self-Service

Estimated time: 25 minutes

In this lab, you will:

1. Create and organize content in a knowledge base
2. Verify a knowledge base
3. Configure a knowledge base
4. Run reports
5. Optionally, make a knowledge base viewable by anyone

Exercise 1 - Create and organize content in a knowledge base

ⓘ Create articles in your knowledge base and categorize them.

1. Log in as the Jira administrator, **Tala Ruiz**.
2. View the knowledge base in Confluence:
    a. If you're not in the Human Resources project, in the top menu, click **Projects** and select **Human Resources**.
    b. In the **Human Resources** project's sidebar, click **Knowledge base**.
    c. In the Articles window, click **Create article.**
    Note: A new browser tab may open with the Confluence create page dialog or the page may appear within Jira. Depending on this, you'll be able to carry out steps either 3 and 4, or 5 and 6.
        i. If you can't find the **Create article** button, the Knowledge base isn't yet linked, click **Go to knowledge base settings**. Otherwise, continue with step d.
        ii. Click **Link space**.
        iii. Select **Human resources** and click **Link**.
        iv. Navigate back by clicking **Back to project** at the top of the sidebar on the left. Then click **Knowledge base** in the project's sidebar again. You should be able to create articles now.
    d. Click **Close** or **Cancel**.
    e. If you are in a separate browser tab for Confluence, you'll see your automatically created knowledge base space named with the same name as your project, Human Resources.
        i. If you're prompted to take the tour, feel free to do so or click **Not now**.
        ii. Apart from the Overview page, the knowledge base is empty.
    f. If the article opened within Jira, you'll see the Articles page and a few sample articles.
    g. Let's start creating content!
3. Create a knowledge base article if you are **within Jira**:
    Note: If the article opened in a new browser tab, skip to step 6 (skipping both steps 4 and 5). Otherwise, if the article opened within your Jira tab, proceed with the following steps.
    a. On the Articles page, click **Create article**.
    b. Name your new article **How to access the Benefits website**.
        i. You'd fill out the steps here but for this exercise, we'll leave it blank.
    c. Let's make this page easier to find by adding a label and adding links to articles with the same label:
        i. Click **Publish** to publish the page.
        ii. On the right side of the page, locate the **Labels** heading and select the plus sign to add a new label.
        iii. Type in **benefits** and then select Enter or click **Create "benefits"** to create the label. Then click **Add**.
        iv. Click the pencil icon to edit the article.

v. Click into the body of the article. In the editing menu at the top of the article, select the plus icon with the down arrow.

vi. Search for and select the **Content by label** macro. You may need to select **View more**
Note: This Confluence macro is used to display lists of pages, blog posts, or attachments that have particular labels. It's great for collecting related pages together and filtering out content that you don't want to see.
vii. In the Label field, search for and select the new **benefits** label. Then click **Save**.
viii. Click **Publish**.

d. Refresh the **Articles** page and view your new article.
e. Click the title of your new article to view it.
Note: There is a shareable link if you want others to provide feedback or collaborate on it.

4. Create a draft if you are **within Jira**:
Note: If creating an article opens a new browser tab, skip to step 6. Otherwise, if the article opens within your Jira tab, follow the steps here.
a. In the sidebar, click **Drafts**.
b. Click **Create article**.
c. Start to create another article titled **How to submit FSA healthcare expenses**. Don't publish it yet and click **Close** instead.
d. Refresh the **Drafts** page.
    - You should see your draft even though it hasn't been published.
e. Click the article to go into edit mode.
f. Click into the body of the article. In the editing menu at the top of the article, select the plus icon with the down arrow.

i. Search for and select the **Content by label** macro to add the macro to this article as well. You may need to select **View more**
ii. In the Label field, search for and select the new **benefits** label. Then click **Save**.
iii. Click **Publish** to publish the page.

g. On the right side of the page, locate the **Labels** heading and click the plus icon to add a label.
i. Add the label **benefits** that you created earlier.
ii. Note that both articles with the benefits label appear in the Content by label section. If you don't see the second article, refresh the page as it may take time for it to load.
iii. Select the **Drafts** page and the page should no longer appear since it is published.

h. Go to the **Articles** page and you should now see your new article here.
i. Proceed to step 7.

5. Create a knowledge base article if you are **in the Confluence tab**:
   Note: Follow this step and step 6 if creating an article opens a new browser tab with the Confluence create page dialog.
   a. Return to your **Jira** project tab.
   b. On the Articles page, click **Create article**.
   c. On the Create dialog, select the **How-to article** template and click **Create**.
   d. Name your new article **How to access the Benefits website**.
      i. You'd fill out the steps here but for this exercise, we'll leave it blank.
   e. Let's make this page easier to find by adding a label and adding links to articles with the same label:
      i. Click **...** (three dots) on the top right of the page and select **Add labels**.
         1. Notice there's already a label kb-how-to-article added because you used the template.
      ii. Enter **benefits** then click **Create "benefits"** and close the dialog.
      iii. At the bottom of the page, click on the **Content by Label** macro and select the **Edit** icon beneath it.
      Note: This Confluence macro is used to display lists of pages, blog posts, or attachments that have particular labels. It's great for collecting related pages together and filtering out content that you don't want to see.
      iv. In the Label field, remove the **kb-how-to-article** as we'll eventually have a lot of how-to articles and it wouldn't be so helpful to show them all.
      v. In the Label field, add the new **benefits** label and save.
   f. Click **Publish**.
   g. Return to your Jira tab and refresh the **Articles** page.
   Note: You see your new article as well as a new How-to articles page. This contains links to all your how-to articles.
   h. Click the title of your new article to view it.
   Note: Here, you can view the article in the project. To edit the article, click the edit icon (if the article was editable within your Jira instance) or the Edit in Confluence link (if the article opened a new browser tab in Confluence). There is also a shareable link if you want others to provide feedback or collaborate on it.
6. Create a draft if you are **in the Confluence tab**:
   Note: Follow these steps if creating an article opens a new browser tab with the Confluence create page dialog.
   a. In the sidebar, click **Drafts**.
   b. Click **Create article**.
   c. Start to create another How-to article titled **How to submit FSA healthcare expenses**. Don't publish it yet.
   d. Return to your Jira tab and refresh the **Drafts** page.
      - You should now see your draft. Even if you close the Confluence tab, the draft will remain here.
   e. Publish the draft:
      i. Return to your Confluence tab where you're editing the new article.

1. If you closed, the tab, click the name of your draft on the Drafts page to return to it in Confluence.

ii. Add the label **benefits** that you created earlier.
iii. Edit the **Content by Label** macro, remove the **kb-how-to-article** label and add the **benefits** label. Save your changes.
iv. Publish your draft and now you see both articles with the benefits label in the Related articles section.
    1. If you don't see the second article, refresh the page, it might take some time.
v. Return to your Jira tab and refresh the **Drafts** page and the page should no longer appear.

f. Go to the **Articles** page and you should now see your new article here.
g. Click **How-to articles** and you should see both the how-to articles you created.

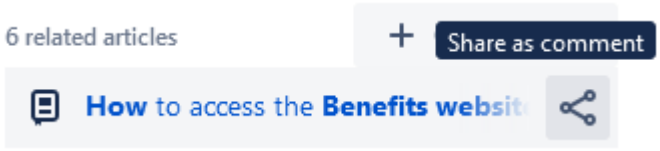
7. Create new categories:
   Note: Creating categories groups related articles together which helps customers to easily find articles for self-service.
   a. In Jira, in the **Knowledge base** sidebar, click **+ New category**.
      i. Name it **Benefits how-tos.**
      ii. Optionally add the description **Find Benefits how-to articles.**
      iii. Click **Create.**
   b. Add the newly created articles to the category:
      i. Click **Add article.**
      ii. Click the **+** (Add article to category) next to your two new how-to articles so that you see a green checkmark for each.
      iii. Click **Back to category.**
   c. Check **Featured** for the **How to access the Benefits website** as this is a very common request and we want to list it first.
   d. Create another category:
      i. Create another category called **Expenses how-tos** with an optional description **Find expenses how-to articles**.
      ii. Add the article **How to submit FSA healthcare expenses** to this category.
   e. View articles in multiple categories:
      i. In the sidebar, click **Articles**.
      ii. Click to open the **How to submit FSA healthcare expenses** article.
      iii. Note on the right that it shows the two categories this article appears in.
   f. Optionally, create another article related to expenses but don't add the benefits label. Add to the Expenses how-tos category.

Exercise 2 - Verify a knowledge base

ⓘ Here you will verify your knowledge base acting as both a customer and an agent.

1. Verify your knowledge base for customers:
    a. Go back to the project and open your service portal in a separate browser tab (via **Channels** then **PORTAL**).
    b. Under Learn more about, you see your two categories.
        i. Select **Benefits how-tos**.
        Note: You should see the How to access the Benefits website article appear first in the Featured articles section as you made it a featured article.
        ii. Click **How to access the Benefits website** and you'll see your article appear right in the portal.
        Note: If you didn't edit the article, it may be a blank page or may contain related articles, edit instructions and codes.
        iii. Assume this article resolved the customer's request and for **Did this article help?**, click the **thumbs up** icon **Yes** at the bottom of the page.
    c. Search for articles:
        i. Click **Help Center** at the top.
        ii. In the Find help and services field, enter **How do I get to the Benefits website**.
        iii. Note the article suggestions that appear. The first one is How to access the Benefits website which would probably solve their problem.
        iv. Open the **How to access the Benefits website** article.
    d. Create a request:
        i. This customer wants to create a request anyway. At the bottom of the article, click **Need to raise a request? Contact us**.
        ii. Click **Questions for HR**.
        iii. Enter a summary of **How do I get to the benefits website?** Again article suggestions appear to help the customer. For this exercise, we'll create a request so we can see the agent's experience.
        iv. For Description, enter **I can't find the Benefits website**.
        v. Click **Send**.
        vi. Keep the service portal tab open for later.
2. Verify your knowledge base for agents:
    a. Return to your **Jira** tab.
    b. In the sidebar, click **Queues** then **All open**.
    c. Open the **How do I get to the benefits website** request.
    d. On the right panel, find the **Knowledge base** field.
        i. Click the **Related articles** link.
        ii. Here you see the articles you created.
        iii. Open the **How to access the Benefits website** article which opens the article in the project.
        Note: An agent can view related articles to help them resolve requests faster.

iv. Back in the Jira request, mouse over the **How to access the Benefits website** article, and click the **Share as comment** icon.



v. View the Reply to customer comment it started creating in the request. Optionally, add some text before the link, for example, **Here's an article that should help:**

vi. Save the comment.
Note: The customer is notified and hopefully, it will resolve their question. This makes it easy for agents to share relevant articles with customers.

vii. Back in the Knowledge base section on the right, click the **plus icon** or **+ Create article** (to create a knowledge base article).
Note: Here agents can quickly create articles using the appropriate template.

viii. Cancel out of the dialog.

ix. There's also a search field where agents can search for articles in the Knowledge base. Search for **FSA** and it should return the **How to submit FSA Healthcare expenses** article. So there are a number of ways having a knowledge base can help agents resolve their requests.

Exercise 3 - Configure a knowledge base

ⓘ Here you configure your knowledge base as the project administrator.

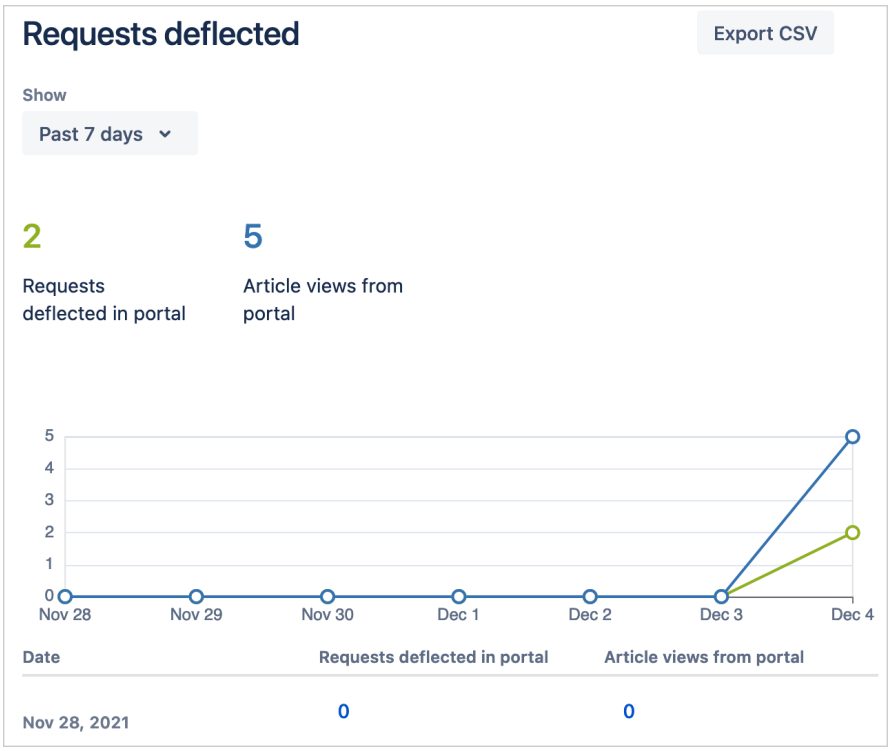
1. Go to the Knowledge base page in project settings:
    a. In the **Human Resources** project sidebar, go to **Project settings**.
    b. In the sidebar, click **Knowledge base**.
    Note: Here you see the space, **Human Resources**. It was created and linked automatically to this project as a knowledge base when this service project was created.
2. Create a new Confluence knowledge base space:
    We want to create a new space for Policy articles.
    a. Click **Create space**.
    b. For Space name, enter **HR policies**.
    c. Click **Create**.
    Note: Now we see the new space listed and we can start adding articles. We won't do that for this exercise.
    d. On the right, the options to Link space or Unlink enable you to link or unlink an existing Confluence knowledge base. We won't do that here.
3. See who can view your knowledge base:
    a. For either space, click the **Who can view** dropdown and note the permission options.
    Note: For the **Only Confluence users** option, all users with a Confluence license and access to the Confluence space, can view articles in it. **Logged-in users** means logged-in users of your service project can view the articles in this space, without a Confluence license. We don't see the **Anyone** option because the permission settings in Confluence don't allow that.
4. Control article suggestions:
    a. View the **Control article suggestions** section.
    Note: Here you see the default request forms for this service project. By default, they all allow suggestions, that is, they automatically show suggested articles.
    b. Click the checkmark in the **Allow suggestions** column for **Change request**.
    Note: This turns off all article suggestions for Change requests.
    c. Click in the **Only show articles labeled** column for **Questions for HR**.
    d. Enter **benefits** and select the label then click the checkmark.
    Note: This restricts article suggestions to those with the benefits label for Questions for HR requests.
5. View your changes in the service portal:
    a. Return to the Human Resources service portal tab.
        i. If you closed it, go back to the project and click **Channels** then hover over **PORTAL** and **Open**.
    b. Click the **Benefits how-tos** category.
        i. At the bottom, click **Need to raise a request? Contact us**.

   ii. Click **Questions for HR**.
   iii. For 'What is your question...' enter **How do I access the website**. Note the suggested articles are the ones with the benefits label as we configured it.
   iv. Click **Cancel**.
c. Return to the Human Resources service portal.
   i. Click **Change request**.
   ii. For 'What information do you need changed' enter **Directions to the website**. No suggested articles appear because we turned off all article suggestions for this request type.
   iii. Cancel out of creating the request.

Exercise 4 - Run reports

ⓘ Here you run reports to gain insights into the effectiveness of your knowledge base.

1. In the Human Resources service portal, perform actions acting as a customer to create report data:
    a. Log into your site as a service agent, **Kevin Campbell**, and go to the **Human Resources** project.
    b. Open the customer service portal from the project sidebar (via **Channels** then **PORTAL**).
    c. Open at least one article and click the **thumbs up icon Yes**.
    Note: This counts towards the 'Requests deflected in portal' metric.
    d. Open another article but don't click anything then return to the portal.
    Note: This counts towards the 'Article views from portal' metric.
    e. Create two requests related to benefits without viewing any articles. You can use the **Questions for HR** request type.
2. In the project, perform actions as an agent to create report data:
    a. Go back to the project tab and view the **All open** queue.
    b. Open one of the requests related to benefits:
        i. On the right, click the related articles in the **Knowledge base** field. If there are no related articles, search for **How to**.
        ii. To the right of one of the articles, click the **Share as comment** icon.
        iii. In the comment, optionally add some text before the link, for example, **This should give you what you need**.
        iv. Save the comment then close the request (move it through the statuses Start, In Progress and finishing with Resolved completing the Resolved dialog).
        Note: This counts towards the 'Requests resolved with an article' metric.
    c. Open another request from the queue:
    d. Don't share an article, just close the request.
    Note: This counts towards the 'Requests resolved without an article' metric.
    e. Close any other open requests using any of the above methods.
3. Run reports:
    a. In the project sidebar, click **Reports**.
    b. In the sidebar, click to run the **Requests deflected** report.
        i. You should see at least one request deflected in the portal and one article view from the portal.

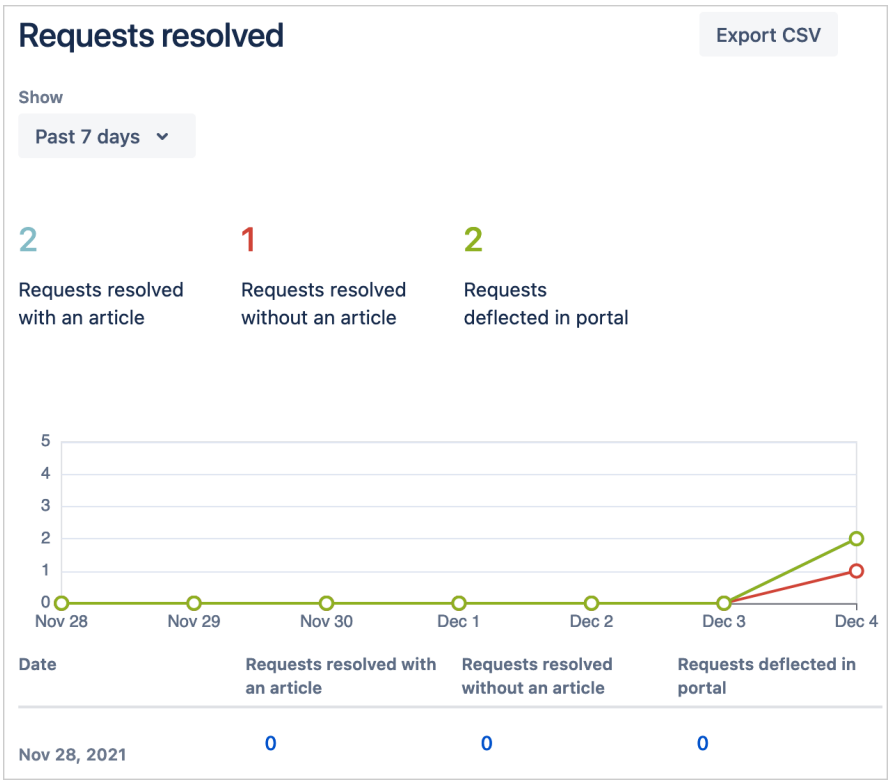


Note: The **Requests deflected in portal** metric shows the number of requests where a customer has viewed an article and answered the question 'Did this article help?' by giving it a thumbs up. The **Article views from portal** metric shows the number of views for each knowledge base article.

ii. Click one of the circles in the graph or one of the non-zero numbers in the list below the graph and you'll see the article(s) appear below the graph.
    - **Tip**: If a circle is for both metrics, click the dropdown list for **Details** and you can choose which metric to show in the table below.

iii. Click on the article and it opens.
    - **Tip**: It's helpful to know which articles are viewed and which are deflecting the most requests.

c. Run the **Requests resolved** report.
    i. You should see at least one request resolved with an article, one resolved without an article, and one deflected in the portal.



Note: This report lists the number of requests resolved after the agent shared an article with the customer, resolved without sharing an article, and deflected in the portal.

ii. Click on the circles in the graph. The **Requests resolved with an article** and the **Requests deflected in the portal** metrics show articles below the graph. The **Requests resolved without an article** shows requests below. You can switch between these metrics.

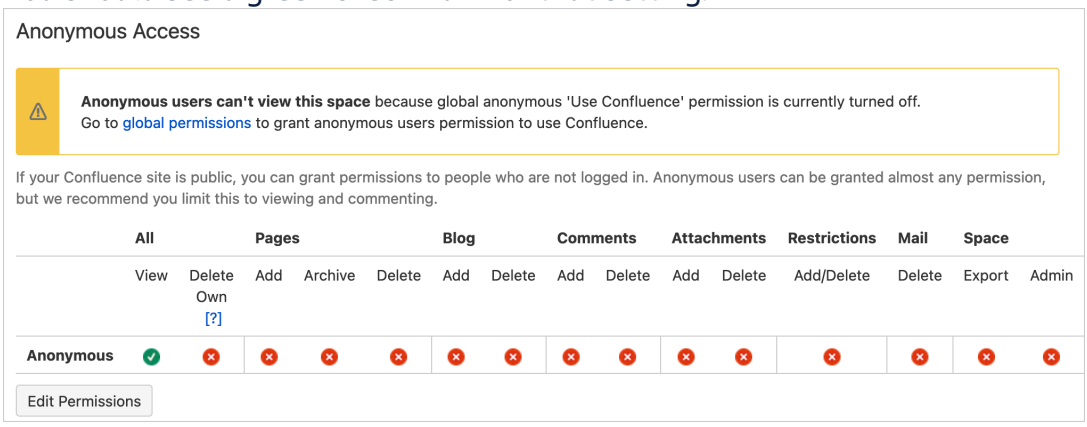
iii. Click the **Show** dropdown above the graph and select a different time period for the report.

Optional Exercise 5 - Make a knowledge base viewable by anyone

ⓘ Here you'll make the Human Resources knowledge base viewable by anyone. You typically wouldn't do this for a Human Resources knowledge base as it would be accessed by internal employees who probably have Confluence licenses. But as a test case, we'll do it here.

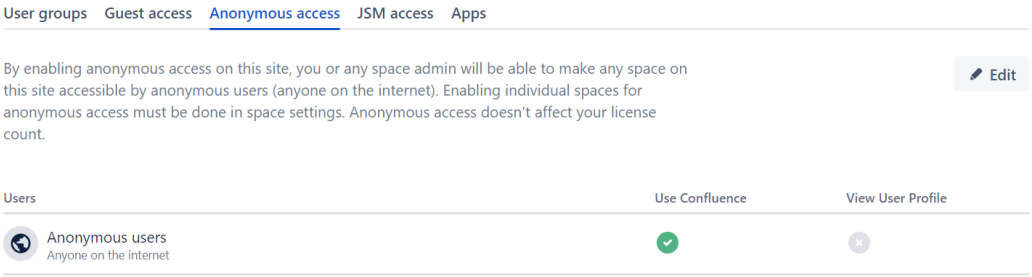
1. Configure Confluence for public access:
    a. Log into your site as the project administrator, **Tala Ruiz**, and go to the **Human Resources** project.
    b. Go to the **Project settings** and then **Knowledge base** project settings page.
    c. In the **Human Resources** space row, mouse over the far right and click **Settings**.

        i. This opens a new browser tab in Confluence. As this is the first time you visited Confluence, you will be greeted with a Welcome screen. You can go through or skip it. Then, you should arrive at the relevant Space permissions page.
    d. Configure Confluence space permissions:
        i. Scroll to the bottom of the page and, under Anonymous Access, click **Edit Permissions**.
        ii. For Anonymous, check the **View** permission and click **Save all**.
        iii. You should see a green checkmark for that setting.

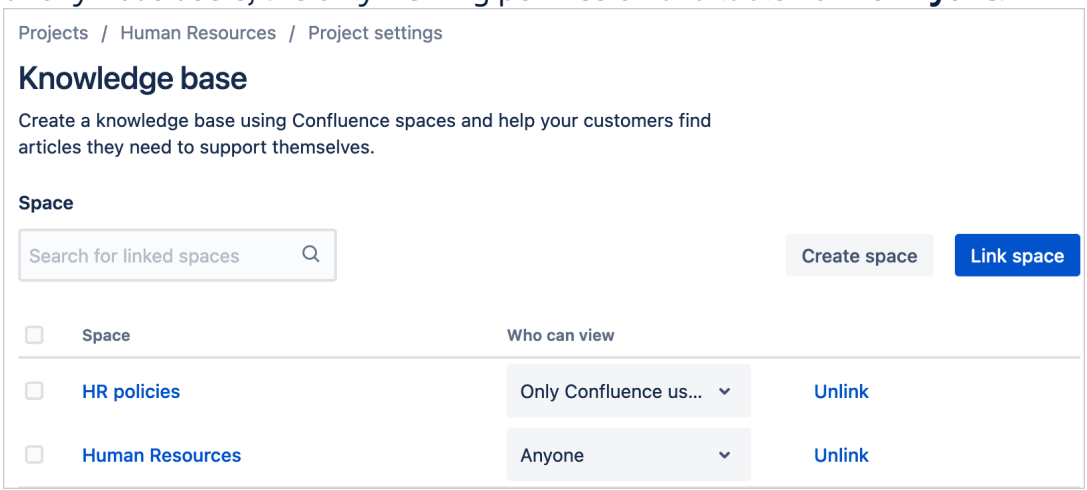


        iv. Note the message that appears stating that anonymous users can't view the space because the global anonymous 'Use Confluence' permission is turned off. We'll turn that on next.
    e. Configure Confluence global permissions:

i. In the message on the Space permissions page, click **global permissions**
Note: This takes you to the Global permissions page in Confluence administration.
ii. Click **Anonymous Access** and then **Edit** or click **Edit Permissions** at the top of the page.
iii. For Anonymous Access check **Use Confluence** and click **Save** or **Save all**.
iv. You should see a green checkmark for the **Use Confluence** setting.

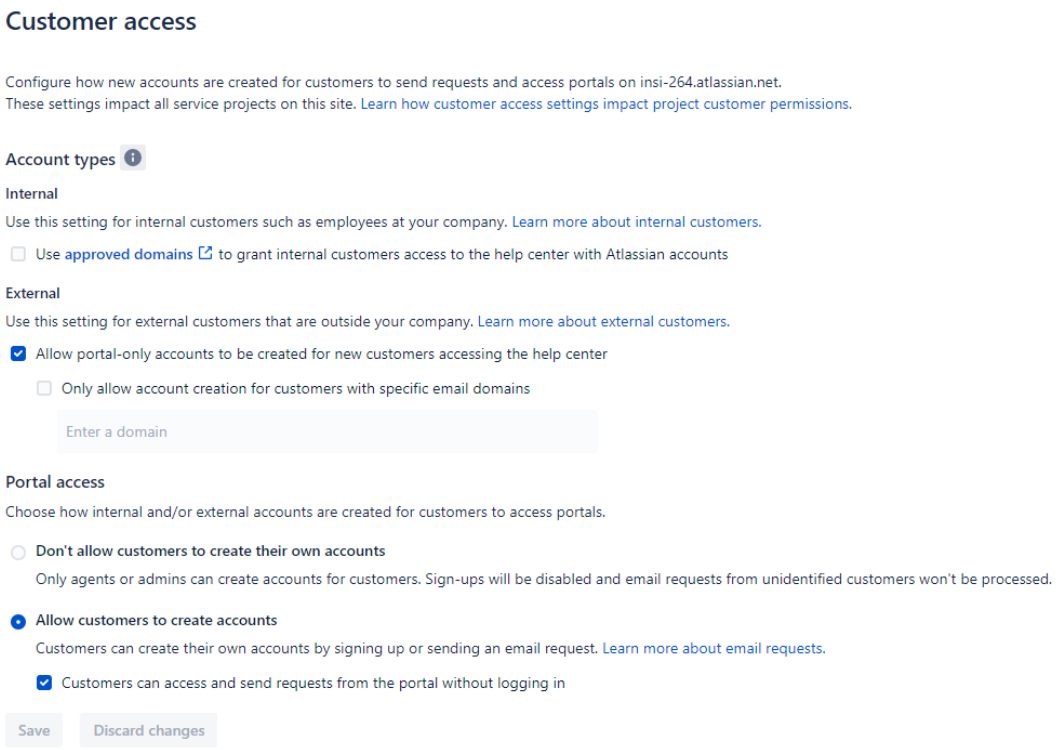


2. Configure Jira for public access:
   a. View the knowledge base viewing permissions in the service project:
      i. Return to your **Jira** project tab.
      ii. Refresh the **Knowledge base** project settings page and look at the viewing permission for Human Resources.
      Note: Because you made the Human Resources space viewable by anonymous users, the only viewing permission available now is **Anyone**.



   b. Configure service project customer permissions:
   This sets who can access the service portal and create requests for just this project.
      i. Go to the **Customer permissions** project settings page.
      ii. Ensure Service project access is set to **Anyone allowed on the customer access settings**.

c. Configure global portal-only customer access:
This sets who can access service portals and create requests for all the service projects on this site.
   i. In the top menu, click the **cog** icon (Settings) and select **Products**.
   ii. In the sidebar, under JIRA SERVICE MANAGEMENT, click **Customer access**.
   iii. Under Account types and External, make sure **Allow portal-only accounts to be created for new customers accessing the help center** is checked.
   iv. Then ensure **Allow customers to create accounts** is checked.
   v. Under Allow customers to create accounts, select **Customers can access and send requests from the portal without logging in** and save.
   vi. As this is a global setting it affects all projects, but you still can control access at the individual project level.
   Click **Save**.



d. Validate public access as an anonymous user:
   i. Get your Human Resources portal URL using one of the following methods:
      - In Jira, navigate to the Human Resources **Project Settings** and then **Portal Settings**. Copy the portal URL.
      - If you still have the service desk browser tab open, click the **Help Center** link in the top left of the page and then copy the URL.
   ii. Open a new private or incognito window. If you're already in a private or incognito window, either use another browser or log out as Tala in the current

browser. Also, if you have another window where you're logged into the service portal as Kevin Campbell, completely log out as Kevin.

iii. Paste the portal URL and you're taken directly to the Human Resources service portal without having to log in.
iv. If you wish, create a request using any email.
v. View the request in the project.
Note: When you create a request on a public portal, the email address you enter when creating it is listed as the Reporter.

Congratulations, you created and organized content in your knowledge base, configured your knowledge base, and ran knowledge base reports! You have completed this lab.

Lab 4 - Automating Service Requests

Estimated time: 15 minutes

In this lab, you will:

1. Create a rule to onboard a new employee
2. View the audit log

Exercise 1 - Create a rule to onboard a new employee

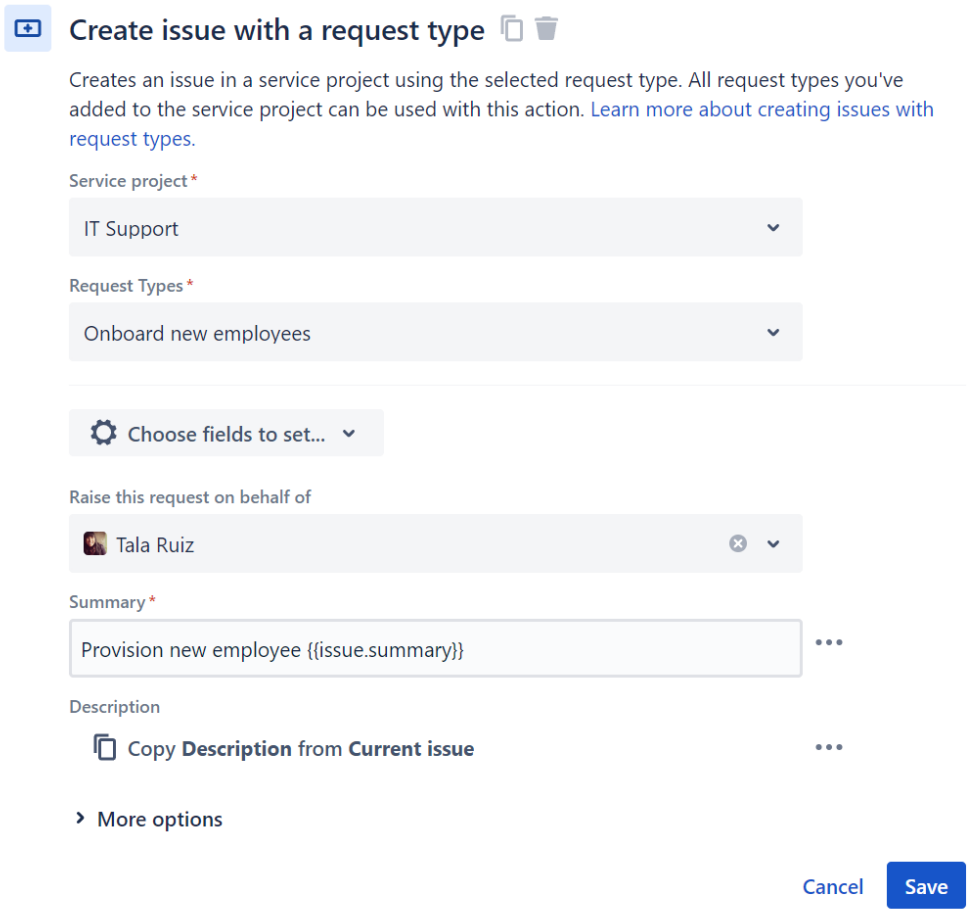
ⓘ Here you create an automation rule so that when a new Employee onboarding request is created in the Human Resources project, it creates a linked request in the IT Support project to set up the employee.

1. Log in as the Jira administrator, **Tala Ruiz**.
2. Create a new project needed for this lab:
    a. In the top menu, click **Projects** then **Create project**.
    b. If you see the **Project templates** screen, follow these instructions (if you see the **Create project** screen, skip to step c below):
        i. In the sidebar, select **Service management**.
        ii. Select **IT service management**.
        iii. Click **Use template**.
        iv. If you're asked to choose, click **Select a company-managed project**.
        v. For Name, enter **IT Support.**
        vi. For What team is this for? or Team type select **Information Technology (IT).**
        vii. Click **Create project**.
        viii. Skip to step 3 below.

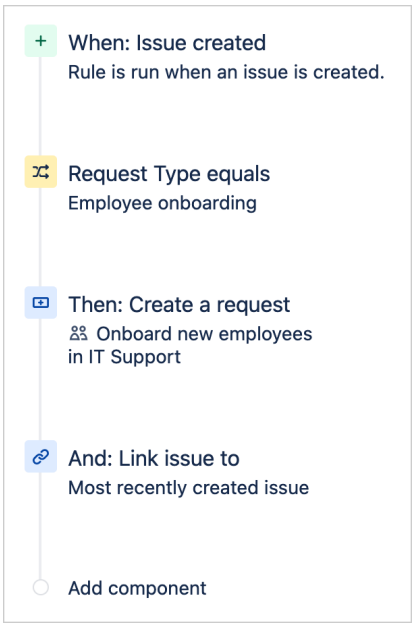
    c. If you see the **Create project** screen:
        i. For Name, enter **IT Support**.
        ii. Click **Change template**:
            1. Near the top of the page click the dropdown and select **Service project**.
            2. Select the **IT service management** template.
        iii. Back on the Create project page, click **Create**.
3. Create a new rule:
    a. Go to the **Human Resources** project.
    b. In the project sidebar, click **Project settings**.
    c. In the sidebar, scroll down and click **Automation**.
    d. In the Automation window, click the **Library** tab.
    Note: Here you see the library of automation rules you can use and edit to get started quickly with some common automation tasks.
    e. If you wish to view any of the library rules, click on the rule to open it, then click **Back to library** then **OK** to return to the library.
    f. At the top of the Automation page, click the **Rules** tab.
    g. Click **Create rule**.
    h. If you're prompted to take a tour, click **Next** to view the tour then click **Get started**, or click **Skip tour**.
    i. Select the trigger, **Issue created**, then click **Save**.
    j. Select the component, **IF: Add a condition**.
    Note: We only want this rule to run for Employee onboarding requests.
        i. Select the condition, **Issue fields condition**.

   ii. For Field, start typing then select **Request Type**.
   iii. Leave the Condition as **equals**.
   iv. For Value, select **Employee onboarding,** then click **Save**.

k. Select the component, **THEN: Add an action**.
   i. Scroll down to the Jira Service Management actions and select **Create issue with a request type**.
   ii. For the service project to create the new request in, select **IT Support**.
   iii. For Request type, select **Onboard new employees.**
   iv. For Raise this request on behalf of, select **Tala Ruiz** or **truiz**.
   Note: If you don't specify a user, the Reporter on the request will be Automation for Jira.
   v. For Summary, enter **Provision new employee {{issue.summary}}**
   Note: The smart value inserts the summary from the Human Resources request which is the name of the new employee.
   vi. Click **Choose fields to set**, find and select **Description**.
   vii. Next to Description, click **...** (three dots) and select **COPY.**
   Note: This copies the Description from the Human Resources request which is the 'What software or hardware will the employee require' field on the request form.
   viii. Click **More options**.
   Note: This is where you can use JSON to set additional fields that are not available under the 'Choose fields to set' option on this form. This is typically used to set custom fields. Here you can see some sample syntax. Don't enter anything here.
   ix. Click **Save**.



l. Select the component, **THEN: Add an action**.
    i. Select the action, **Link issues**.
    ii. For the first dropdown, select **relates to**.
    iii. For the second dropdown, select **Most recently created issue**.
    iv. Click **Save**.
m. Your rule should look like this:



n. On the right, name your new rule **HR employee onboarding** and click **Turn it on**.

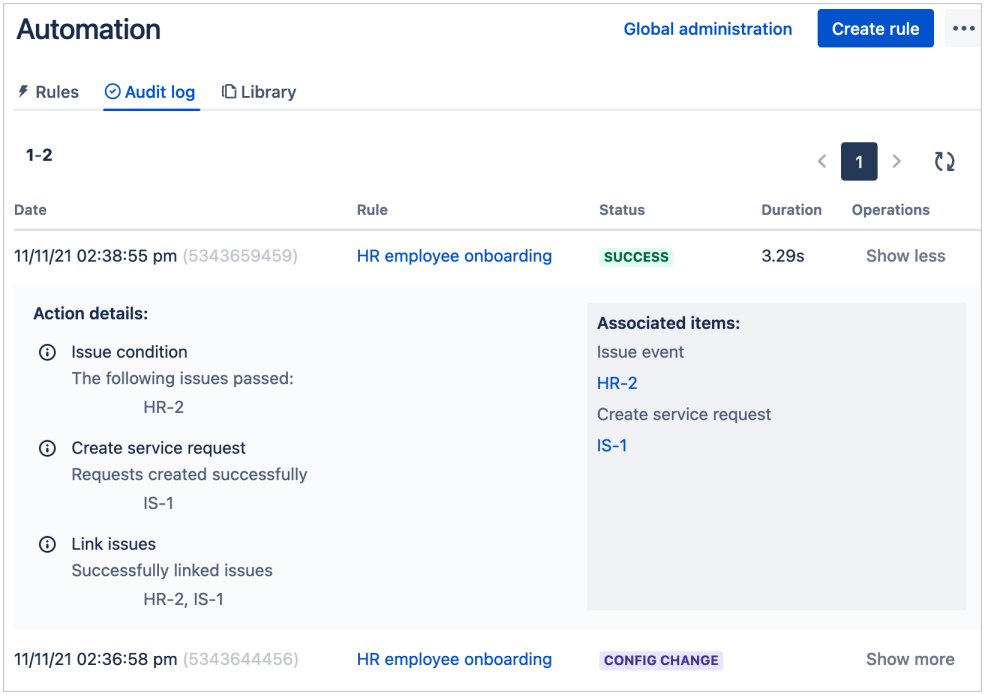
4. Verify your new rule:
   Here we'll create a new service request in the Human Resources service portal as if we were the Hiring Manager. Then confirm it created the new request in the IT Support project and linked the two requests.
   a. Create a new service request:
      i. Click **Back to project**.
      ii. In the project sidebar, click **Channels**, hover over **PORTAL**, and click **Open**. This opens the Human Resources service portal in a new tab.
      iii. Click the option to raise a request, and then select **Employee onboarding**.
         1. For Employee's name, enter any name.
         2. For the start date, select a date in the future.
         3. In the mandatory fields on his screen, enter any location, employment type, job title, and hardware or software. Then, add a user into the mandatory field "**Who is the employee's manager?**".
         4. Click **Send**.
   b. Verify the new requests:
      i. Return to your **Human Resources** project tab and, from the **All open** queue, open your new request.
         1. Note the Summary contains the name of the new employee and the Description contains what you entered for software or hardware.
         2. Scroll down and open the linked issue.
      ii. In the **IT Support** request, verify:
         1. The summary contains **Provision new employee** then the name you entered for the new employee.

2. The Description has the Description from the original request.
3. The Request Type (in Details on the right) is **Onboard new employees.**
4. Click the link back to the Human Resources request.

iii. If something is wrong, we'll check the Audit log next which can help with debugging.

Exercise 2 - View the audit log

1. Return to the **Human Resources** project and go to the **Automation** project settings page.
2. On the Automation page, click the **Audit log** tab.
   Note: You'll see two entries for your rule - one when you created it with a status CONFIG CHANGE, and the most recent one will be the execution of your rule with, hopefully, the status, SUCCESS.
3. Next to your most recent entry for your rule, click **Show more**.
   Note: Here you see details about the execution of your rule. If there's a problem you can see which component it occurred in and an error or message about what happened. This is very useful for testing and troubleshooting.
   - You'll see a status of CONFIG CHANGE when you create or update an automation rule.



Congratulations, you created a rule to onboard a new employee and viewed the audit log.

Lab 5 - Automating Asset Management

Estimated time: 20 minutes

In this lab, you will:

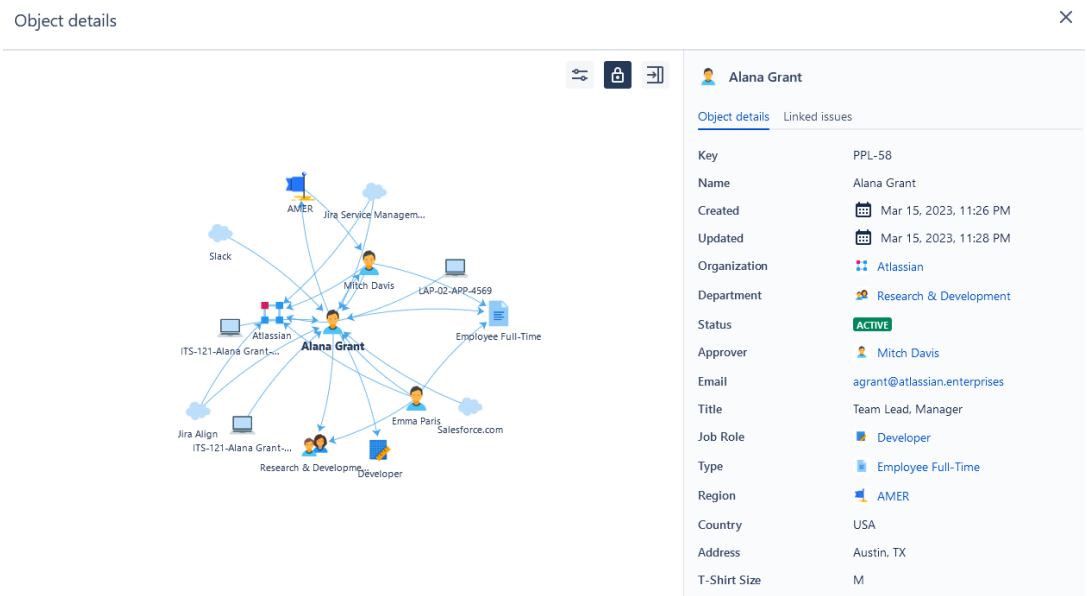
1. Create an Assets custom field and a new request type
2. Create a rule to populate a request with asset information
3. Optionally, create a rule to update asset information

Exercise 1 - View Assets

1. Make sure you are logged in as the Jira administrator, **Tala Ruiz**.
2. In the top menu, click **Assets**.
    a. If you don't see Assets in the menu, click **More** first.
3. Click to open the **People** schema.
   Note: Here you see a schema to track all the people assets in the organization. On the left, you see the object types - People, Organization, Department, Team, etc.
4. If it's not already selected, on the left, click **People** (the object type).
    a. Next to the column with the object types, you see a list of "People" objects.
    b. Click **Alana Grant** to view her details on the right.
    c. In Alana's details, click **Object Graph** in the Linked objects section. The icon for Object Graph is:

This shows all the relationships the Alana Grant object has with other objects in the Assets schemas.

i. If you do not see any objects, click the sliders icon, and then in the **Reference types** section, select the checkbox for **Reference**.



ii. Click any of the objects here, for example, her laptop **LAP-02-APP-4569**, and you can see the details of that object on the right.
iii. Explore more if you wish and, when you're done, click **X.**

5. Click any of the other object types to view their objects. For example, the **Department** object type contains objects such as Finance, Manufacturing, Operations, etc.

6. On the left, note that the Policies object types is nested, which means it has its own objects.
7. Explore more if you wish and have time.

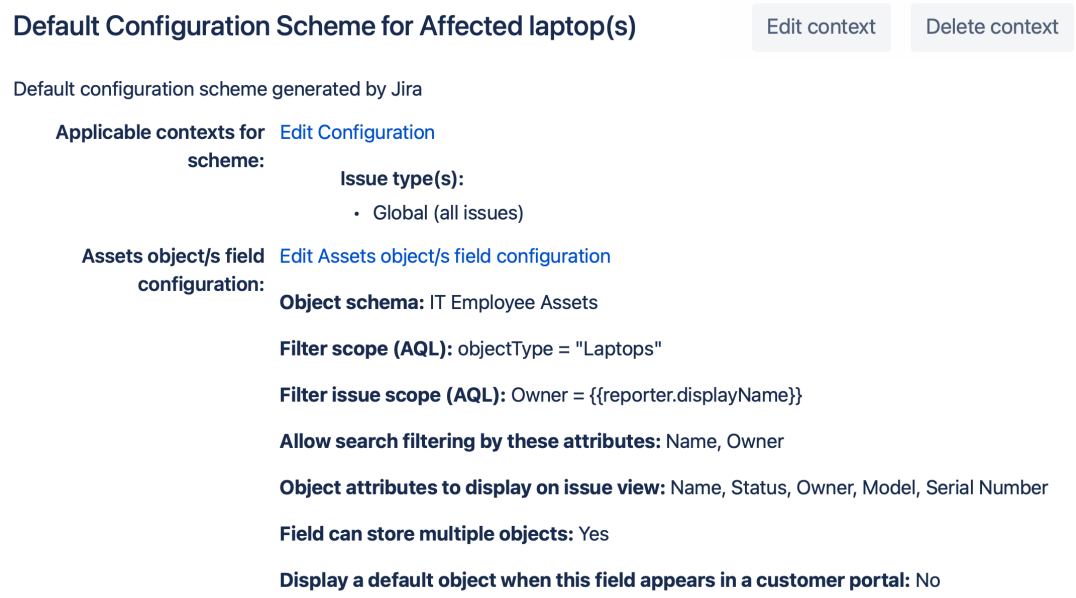
Exercise 2 - Create an Assets custom field and a new request type

ⓘ Here you do the setup for the next exercise. There you'll create a rule to populate a request with asset information when an employee reports a damaged laptop.
In this exercise, you view a laptop asset and then create an Assets custom field to hold the laptop asset information. Then you create a new request type for reporting a damaged laptop and place the new field on a screen. This is so the reporter's laptop asset information can appear on damaged laptop requests.

1. View an Assets object:
    a. In the top menu, click **Assets**.
        i. If you don't see Assets in the menu, click **More**, then select **Assets**.
    b. Click to open the **IT Employee Assets** schema.
    c. Expand the **IT Hardware** object type, then click the **Laptops** object type. Here you see the laptop objects (assets).
    d. Click to view **LAP-02-TP-6224**.
        i. This is the object that you'll be retrieving information from and then updating with automation. Note the owner is **Kevin Campbell**.
2. Create an Assets custom field in Jira:
   This is the field that will appear on your requests and contain asset information.
    a. In the top menu, on the right, click the cog icon (Settings) and select **Issues**.
    b. In the sidebar, under FIELDS, click **Custom fields**.
    c. Click **Create custom field**.
    d. On the left click **All**, and search for **Assets objects**.
    e. Select the **Assets objects** field type, and click **Next**.
        i. Name the field **Affected laptop(s)**.
        ii. Click **Create**.
        iii. On the Associate field Affected laptop(s) to screens page, select the checkbox for
        IS: Jira Service Management: Request Fulfilment View/Edit Screen.
        Note: We want this field to appear for service requests in the IT Support project when a request is viewed or edited.
        iv. Scroll to the bottom of the page and click **Update**.
    f. Click **...** (three dots) for the new **Affected laptop(s)** field and select **Contexts and default value**.
        i. Click **Edit Assets object/s field configuration**.
        Note: First, we choose which object schema to use, and what filters to apply when searching for objects in the field.
        ii. For Object schema, select **IT Employee Assets**.
        iii. For Filter scope (AQL), enter

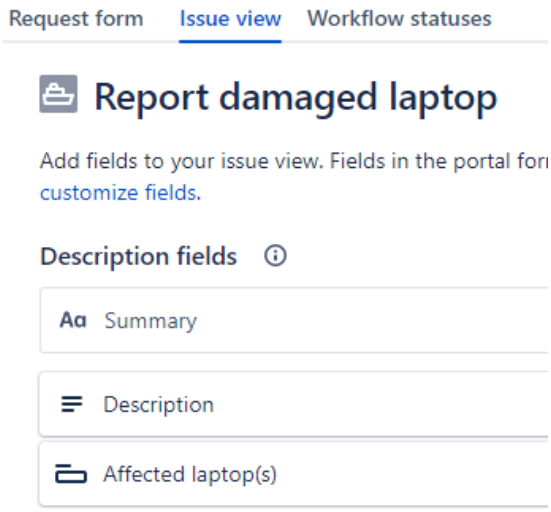
```
objectType = "Laptops"
```

iv. For Filter issue scope (AQL), enter **Owner = {{reporter.displayName}}**.
Note: This restricts the objects returned to just the laptop (or laptops) owned by the reporter.
v. Scroll down to the **User interaction** section.
Note: Here we configure how the field will function for users, and how it will display on the issue.
vi. For 'Allow search filtering by these attributes', select **Name**, and **Owner**.
vii. For 'Object attributes to display on issue view', select **Name, Status, Owner, Model,** and **Serial Number**.
viii. For 'Field can store multiple objects', click the toggle to turn it on.
ix. Click **Save** and ensure your field configuration matches this screenshot:



3. Create a new request type:
Here we create a new request type for reporting damaged laptops where your new custom field will appear.
   a. Go to the **IT Support** project settings.
   b. Go to **Request types**.
   c. On the **Service requests** page, click **Create request type**:
      i. For Name, enter **Report damaged laptop**.
      ii. Click **Change icon** then select the **laptop icon** and save. (Note that you may need to click the 3 dots for more icons to appear.)
      iii. For 'Use workflow and fields from this issue type', select **[System] Service request**.
      iv. Click **Next**.
      v. Select the **Computers** portal group and click **Create**.

4. Position the custom field on the agent's view of the request:
    a. Return to the **IT Support** project tab and, if you're not there, return to the **Report damaged laptop** request type.
    b. On the **Issue view** tab (or it may be called **Agent view**):
        i. Scroll down and find the **Affected laptop(s)** field.
        ii. Drag it up to the **Description fields** section and place it beneath **Description**. **Note:** Your site will look slightly different than the screenshot below if your tab is titled **Agent view**.



        iii. Save your changes.
    c. Optionally, add a description for the request type:
        i. Click the **Request form** tab.
        ii. For **Request type description** (or **Request form description**), enter **Damaged your laptop? Request a new one here.**
        iii. Click **Save changes**.

5. Verify your new custom field:
    a. Create a new request as a user who owns a laptop in Assets:
        i. Get the portal URL:
            1. Go to the **Portal settings** project settings page.
            2. Copy the **Portal URL**.
        ii. Open a private/incognito window or a different browser and log into the IT Support service portal as **Kevin Campbell**. (You need to be logged in as this user to get the match in Assets.)
        iii. Create a new request:
            1. Select **Computers**, then **Report damaged laptop**.
            2. For Summary, enter **I cracked the screen** and click **Send**.
        iv. If you can, keep Kevin's portal window open for later.
    b. Verify the field in the agent view:
        i. Return to the **IT Support** project window logged in as **Tala Ruiz**.

ii. Open Kevin's new Report damaged laptop request.
iii. Ensure the Affected laptop(s) field is on the request.

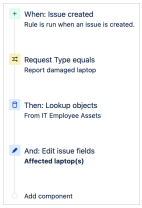
Exercise 3 - Create a rule to populate a request with asset information

ⓘ Here you create a rule where if an employee reports a damaged laptop, it retrieves the laptop's asset information and places it on the request in the Affected laptop(s) field.

1. In the **IT Support** project, go to the **Automation** project settings page.
2. Create a rule to retrieve Assets information:
    a. Click **Create rule** and select the trigger **Issue created**. Click **Save**.
    b. Select the component, **IF: Add a condition**.
        i. Select **Issue fields condition**.
        ii. For field, select **Request Type**. For condition, select **equals**. For the Value, select **Report damaged laptop**. Click **Save**.
    c. Select the component, **THEN: Add an action**.
        i. Select **Lookup objects**.
            • You may get an unknown error if you're using a Chrome incognito window. If so, use either a regular Chrome window or use another browser.
        ii. For Schema, select **IT Employee Assets**.
        iii. For Query, enter

```
objectType = "Laptops" AND "Owner" = "{{reporter.displayName}}"
```

        and click **Save**.
        Note: The result of this query (the object key) goes into the {{lookupObjects}} smart value which you can use in other actions.
    d. Add another component, **THEN: Add an action**.
        i. Select **Edit issue**.
        ii. Select the field **Affected laptop(s)**.
        iii. Enter the value **Key = {{lookupObjects}}** and click **Save**.
    e. Your rule should look like this:



    f. Name the rule **Report damaged laptop - Set affected laptop(s)** and click **Turn it on**.
3. Verify your new rule:
    a. Create a new request as **Kevin Campbell**:
    You need to create the request as a user who owns a laptop in Assets.
        i. If you still have Kevin's service portal window open from the previous exercise, go there. Otherwise:

1. As Tala, go to the **Portal settings** project settings page and copy the **Portal URL**.
2. Open a private/incognito window or a different browser and log into the portal as **Kevin Campbell**. (Ensure you actually log in as Kevin.)

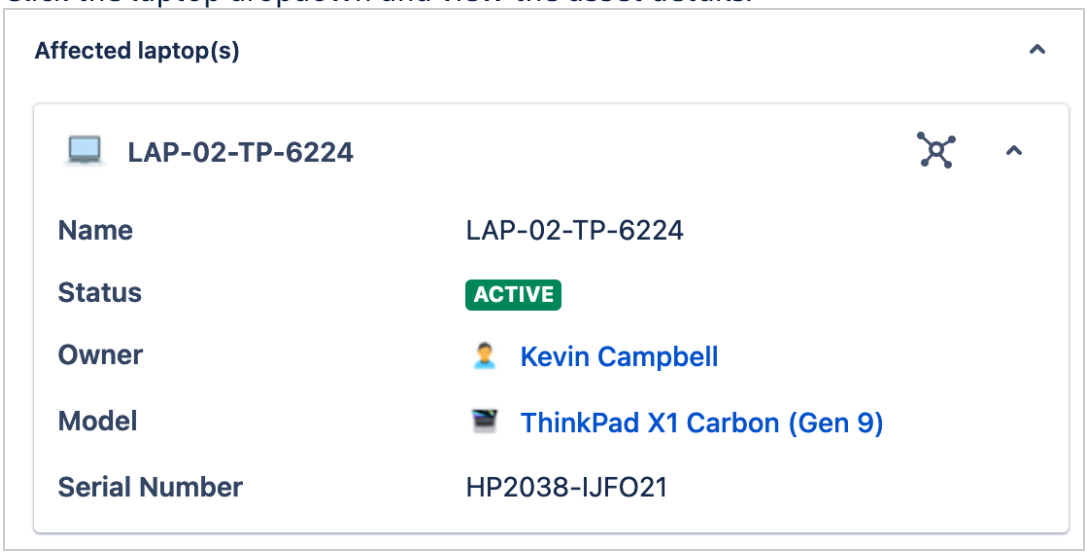
ii. Create a new **Report damaged laptop** request.

b. Verify the automation rules as the project administrator:

i. Return to the **IT Support** project where you're logged in as **Tala Ruiz**.

ii. Open Kevin's newest request and verify that you see his laptop listed in Affected laptop(s).

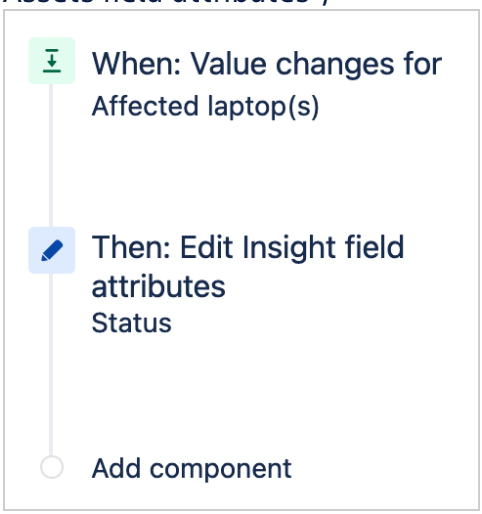
iii. Click the laptop dropdown and view the asset details.



Optional Exercise 4 - Create a rule to update asset information

ⓘ Here you create a rule to update the laptop's status in Assets when the Affected laptop(s) field is updated. The field is updated by the rule you created in the previous exercise when a new damaged laptop request is created.

1. In the **IT Support** project, go to the **Automation** project settings page.
2. Create a rule to update the Assets laptop's status:
   This rule monitors for changes in the Affected laptop(s) field for 'Report damaged laptop' requests and updates the Assets status for the laptop to Support Requested.
   a. Click **Create rule**, then select the trigger, **Field value changed**.
      i. For "Fields to monitor for changes", select **Affected laptop(s)**.
      ii. For "Change type", keep **Any changes to the field value**.
      iii. Leave For as **All issue operations**.
      iv. Click **Save**.
   b. Select the component, **New action**.
      i. Select **Edit Assets field attributes** under Issue actions.
      ii. Ensure the Assets field is set to **Affected laptop(s)**.
      iii. Click **Choose the attributes to set** and check **Status**.
      iv. For Status, enter **Support Requested**.
      v. Click **Save**.
   c. The rule should look like this: (Note that "Edit Insight field attributes" may be "Edit Assets field attributes")



   d. On the left, above the rule, click **Rule details**.
      i. Name the rule **Report damaged laptop - Set status**
      ii. Under Allow rule trigger, check **Check to allow other rule actions to trigger this rule**... then click **Save**.

e. **Turn it on**.

3. Verify your new rule:
    a. Create a new request:
        i. Return to your service portal as **Kevin Campbell**.
        ii. Create a new **Report damaged laptop** request.
    b. Verify the automation rules as the project administrator:
        i. Return to the **IT Support** project where you're logged in as **Tala Ruiz**.
        ii. Open Kevin's newest request and view the Affected laptop(s) field.
        iii. Verify the laptop's Status has been updated to **SUPPORT REQUESTED**.

Congratulations, you created an Assets custom field and a new issue type and created a rule to view Assets information! You have completed this lab.

Lab 6 - Improving and Reporting on Service Request Management

Estimated time: 15 minutes

In this lab, you will:

1. Run default reports
2. Run and edit custom reports
3. Create a new custom report

Exercise 1 - Run default reports

1. Make sure you're logged in as the Jira administrator, **Tala**.
2. Optionally, create data for your reports:
    a. If you wish to see more data in the reports, resolve any requests you may have open in the IT Support project if you created it earlier.
    b. Create some new service requests, for example, Get IT help, in the IT Support service portal and resolve some of them.
    c. To see request deflections and articles viewed:
        i. Create an article in your knowledge base.
        ii. Get your portal URL (from the Portal settings project settings page).
        iii. Open a private/incognito window and paste the portal URL.
        iv. Log into the portal as Kevin Campbell, view the article, and mark it helpful.
3. Run default reports:
    a. If needed, return to the **IT Support** project, logged in as **Tala Ruiz**.
    b. In the project sidebar, click **Reports**.
    c. Click each of the four default reports to run them.
        - **Note**: You won't see much data in the default reports unless you've resolved requests and viewed articles in your customer portal and marked them as helpful.
        - The **Workload** report shows each agent and how many issues they have in progress.
        - The **Satisfaction** report shows comments, ratings, etc from customer satisfaction surveys.
        - The **Requests deflected** report lists the number of times your customers viewed knowledge base articles in the portal and found them helpful.
        - The **Requests resolved** report shows the total number of requests resolved over a certain time period. It also lists the number of requests resolved with an article, resolved without an article, and deflected in the portal.

Exercise 2 - Run and edit custom reports

1. In the sidebar, under CUSTOM, run the **Created vs Resolved** report.
   Note: This report compares the number of requests, of all types, created and resolved over time.
2. Click ... (three dots) above the report and select **Edit report**.
   a. In this case, we want to also see metrics for service requests.
   b. On the Edit report page, click **Add series**.
      i. Leave it at the default series, **Created**.
      ii. For Label, enter **Service requests created**.
      iii. Choose a color other than red and green, e.g. blue.
      iv. For Filter by, click the **Type** dropdown and select **[System] Service request** and **[System] Service request with approvals**.
      v. Click **Add**.
   c. Repeat these steps to add a new series:
      i. Select the **Resolved** series, using a Label **Service requests resolved**, choosing a different color, and selecting the two service request types.
   d. Back on the Edit report page, click **Save**.
      Note: Now your custom Created vs Resolved report shows created and resolved metrics for all request types and for just service requests.
   e. Create another request this time choosing another type, for example, Report a system problem (under Common Requests or Servers and Infrastructure), then resolve it.
   f. Refresh your report and you now see metrics for all request types. You may see different metrics depending on how many requests you created and resolved.

3. Run and optionally edit any of the other custom reports you wish.

Exercise 3 - Create a new custom report

1. At the bottom of the sidebar, click **New report**.
   Note: Here you can create new reports. Say you're interested in seeing metrics on the percentage of the Time to first response and Time to resolution SLAs that are met for service requests.
   a. For name, enter **Time to response & resolve % met**.
   b. Click **Add series**.
      i. Click the **Series** dropdown.
         1. In the TIME METRICS SERIES, choose **Time to first response - % Met**.
      ii. For Label, enter **Time to first response % met**.
      iii. Choose a color.
      iv. Leave it as **Specific issues**.
      v. For Type, select **[System] Service request** and **[System] Service request with approvals**.
      vi. Click **Add**.
   c. Add another series using **Time to resolution - % Met**, labeling it **Time to resolution % met**, choosing a different color, and choosing just service requests.
   d. Click **Create**.
2. Now you see your new report. And it's listed in the sidebar under CUSTOM.

Congratulations on completing all the labs!