**Jira Service Management**

Sign up for a Jira Service Management site

Before you set up your site, you need to sign up for one. Signing up for a Jira Service Management site gives you a 7-day trial with access to every feature.

To sign up for a Jira Service Management Cloud site:

1. Go to our products page and choose the product you want to try.
2. Fill in your details and select **Agree and Sign up**.
3. Complete any further details in the signup process. It might take a few minutes for your site to be created.

To finish setting up your site, create your first service project.

To create your first service project:

1. From the onboarding screen, use the dropdown to select whether you’ve used Jira or Jira Service Management before.
2. Click **Let’s go!**.
3. Choose a project template for your first service project. Don’t worry, you can always change this later.

# **What is Jira Service Management?**

With Jira Service Management, you can easily receive, track, manage, and resolve requests from your team’s customers. Customers can send requests by email, via help centers, and an embeddable widget. Jira Service Management makes it easier to categorize service requests, incidents, problems, and changes by organizing and prioritizing these requests in a single place, and keeps your team on track with goals (or service level agreements).

Jira Service Management is built on the Jira platform, so you’ll see some terms and concepts that carry across all of Atlassian’s Jira products. It’s designed to bring IT, development, operations and business teams closer together with a variety of features that emphasize collaboration at speed.

Here’s a quick overview to help you learn the Jira Service Management lingo:

## **How work appears**

Customers submit their service requests to your team through help centers, an embeddable widget, or via email or APIs.

## **How teams work**

Each team can work on a project that services requests from a certain area – like IT, HR, legal, or finance. Templates are different types of projects that are tailored to suit certain teams – e.g. IT service management. Each team can therefore have their own portal, can own the performance of their service project, and can route work into projects belonging to other teams.

## **How work is tracked**

Service project agents work on customer requests. These requests are tracked as issues in a queue. Issue progress is set up by a workflow that can include steps like In progress or Needs approval.

## **How work is reduced**

Leverage the power of Atlassian’s product Confluence to set up your own knowledge base within your own project. Knowledge base articles appear on your portal so your customers can help themselves before reaching out to you.

Jira Service Management also has a number of additional features that come out-of-the-box for IT service management projects, and can be enabled on other projects:

## **Modern incident management, powered by Opsgenie**

All Jira Service Management Cloud plans come with major incident management, on-call scheduling, alerting, incident swarming, and more – powered by Opsgenie, another Atlassian product. These features seamlessly integrate with your service project, allowing you to instantly let the right people know about critical issues while giving them the context they need to take action. Connect Opsgenie with Jira, Bitbucket, and Confluence to orchestrate the entire, end-to-end incident resolution process across development and IT operations teams.

## **Change management, built for the DevOps era**

Creating change requests in Jira Service Management helps your teams make smarter decisions around changes to services by giving them contextual information from software development and infrastructure-related tools. Lighten the load and work more efficiently with automated change risk assessments, advanced approval workflows, and integrations with CI/CD tools like Bitbucket Pipelines, Jenkins, and CircleCI.

## **Work smarter with bulk actions**

Your agents can use bulk actions and machine learning capabilities to intelligently categorize, link or transition similar issues, and take action quickly.

**What are project roles in Jira Service Management?**

Project roles enable project administrators to associate users with a particular function and set up similar permissions or restrictions for them.

When you sign up for any Jira product, the administrator role is automatically created, along with project roles specific to each product.

After this, Jira administrators can define and manage these project roles. Project administrators can assign different people in their service projects to these defined project roles.

Roles in Jira Service Management

In real life, people play different roles in your service project. Your team may have an IT manager who reports on your team’s progress, or you may work with consultants or contractors.

In Jira Service Management, project roles allow you to fine-tune how people access and interact with your service project. Different roles may need a limited amount of access to the content of your team’s work. Or, you might want to limit what they are able to do in your service project. For example, you may want to allow only your team’s IT manager to create the queues that your agents work on. Or, you might want to prevent a consultant from changing a request’s status.

**Administrators**

Project administrators are *licensed users* who set up the service project and manage users.

Project administrators for your service project can:

* access all features in Jira Service Management
* manage users and roles in service projects
* set up portals, request types, queues, reports and SLAs
* perform all tasks that agents can

**Service Desk Team**

**Agents**

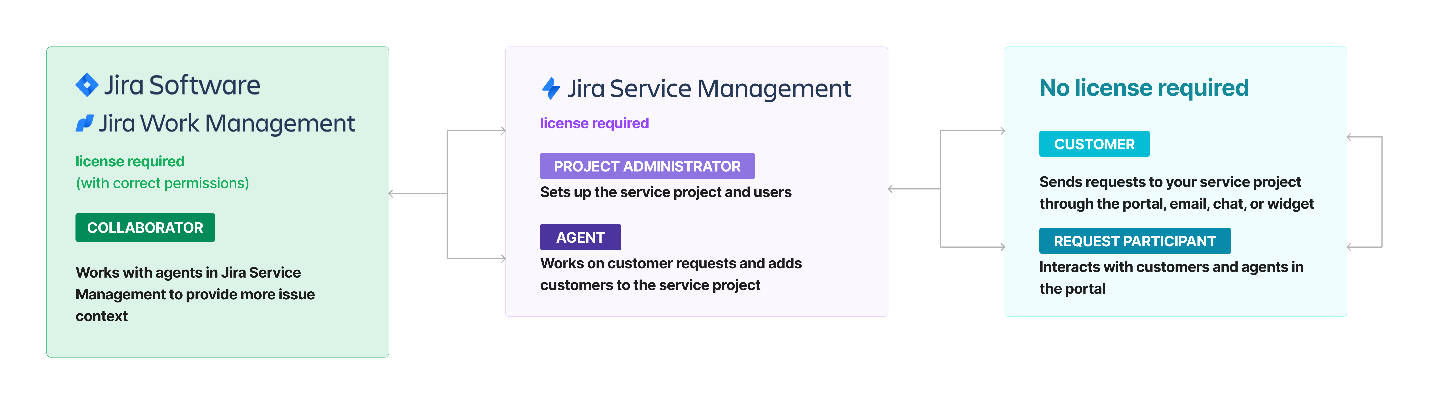
Agents are *licensed* users who work on customer requests and add customers to the service project who can

* view the portal, queues, reports and SLA metrics within a service project
* view, add, edit and delete customer-facing and internal comments on issues
* add customers to a service project
* view, create and manage content in the knowledge base
* manage customers and organizations

**Collaborators**

Collaborators are a specific type of *licensed* users in your Jira site whom agents in Jira Service Management work with. They usually belong to internal teams in your organization and they occasionally assist agents with customer requests by making internal comments. For example, developers who help support staff analyze a bug and add a comment that explains the cause and any workaround available.

To be a collaborator, the user should be added to the **Service Desk Team** role in your service project.



Collaborators can:

* view issues, comments and attachments
* add attachments and delete their own attachments
* add internal comments to issues and delete their own comments
* watch and vote for issues
* view other watchers and voters

These are the only permissions a collaborator can have and if admins try to give the collaborator additional permissions, they won’t be supported due to their role limitations.

**Service Desk Customers**

Customers are *unlicensed* users who send requests to your service project through the portal, email, or widget. For example, employees who raise requests to an internal service desk will have access to the portal with no product access to the project are usually internal customers.

Customers are added to the **People** page on your project settings when their accounts are created. Customers can have their accounts created by sending email requests, signing up from your help center, or being invited by agents and admins.

Customers can:

* raise requests through help centers, email, or widget
* track their requests in help centers
* comment on their requests
* read knowledge base articles
* approve other customers' requests
* share requests with other customers (if allowed by customer permissions)

**Stakeholders**

Stakeholders are people who are not responders of an incident but can be updated about an incident’s progress to take precautions and actions. Agents can keep the stakeholders updated by adding them to incidents.

Stakeholders don’t need an agent license in Jira Service Management’s Premium and Enterprise plans. You can invite any number of stakeholders, without consuming agent licenses. On Free and Standard plans, only users with an agent license can be added as stakeholders of incidents.

While stakeholders have the same permissions as the customer role, this role can receive updates about an incident when they are added as a stakeholder of it.

**What are the project templates?**

When you create a project in Jira, you’ll browse a library of different templates across all the Jira Cloud products you own: Jira Software, Jira Service Management, and Jira Work Management. In the template library, the information and best practices of each template help you select the optimal template that is best suited for your new project.

Jira Service Management has a variety of project templates to help teams get set up quickly by creating projects tailored to a specific team or use. These templates include pre-configured request types, workflows and other features relevant to their type.

IT service management

Designed for IT teams, DevOps, or any team looking for a powerful service management solution with incident and change management capabilities. This template handles service requests, resolves incidents, approves changes, and fixes problems using ITSM best practices.

General service management

Best suited for teams looking for a central place to efficiently collect, prioritize, and manage support requests. This template makes it easy for employees to submit requests, and for your team to respond to them using workflows that support their processes.

Customer service management

Best suited for teams needing a branded support experience for external customers, this template is designed to deliver great service experiences by helping your external customers or business partners quickly get the help they need.

HR service management

Designed for HR teams needing a central place to manage staff and their requests, this template provides full visibility of payroll, onboarding, change requests, general inquiries, and other HR services.

Facilities service management

Best suited for facilities teams needing an easier way to track work and manage employee requests, this template manages requests for maintenance, moving, and event planning.

Legal service management

Designed for legal teams looking for a clear and central way to track and manage their work, this template creates, tracks, and manages your contracts through the review cycle to resolution.

Finance service management

Designed for finance teams, this template provides a central place to field queries, and manage budget, spend, and other finance requests, while helping employees find answers to common questions.

Marketing service management

Best suited for marketing teams needing a central place to manage, track, and report on all kinds of marketing requests, this template helps to collect the information needed to get the job done and stay on top of progress.

Analytics service management

Designed for analytics and data teams that want to capture, triage, and manage requests in one location and help employees access the data and insights they need.

Sales service management

Designed to provides sales teams with a central place to quickly triage and respond to requests for support, reviews, or approvals needed to keep deals running smoothly.

Design service management

Best suited for design teams needing a central place to manage all incoming design requests and streamline collaboration with stakeholders, producers, and approvers.

Blank project

Designed for teams that want a project with minimal pre-configured settings. Blank projects only have an 'Emailed request' request type and one workflow, to give you a basic starting point to create a bespoke project that supports your team's ways of working.

Get to know the main Jira Service Management features

Once you’re in your service project, you’ll find it packed with helpful features.

**Queues**

Queues are where your agents work on customer requests. As a project administrator, you can set up and configure queues to triage requests to the right service project agents. Your agents can then view and work on these requests from your queues.

**Dashboards and Reports**

Use reports to visualize trends in your projects. Project administrators can also set up custom reports to discover new trends not displayed by the default reports.

**Channels**

Channels are the different ways that customers can send requests. In channels, you can set up and edit your email, help center, and widget channels.

When you sign up for a Jira Service Management site, a **help center** for your site gets created automatically. For each service project you create, a corresponding **portal** also gets automatically created.

**Customers**

Customers are unlicensed userswho send requests to your service team via the portal, email, or widget. Jira Service Management converts the customer requests into issues for your agents to work on.

**Project settings**

Project settings is where you configure your service project. Here, you can set up request types and forms, link your service project to an email account, configure your virtual service agent, manage admins, agents and end-user permissions, and more.

**Knowledge base**

Jira Service Management's knowledge base, powered by Confluence, enables you to write and share articles that help agents and customers get the help they need quickly.

**Forms**

Forms can use conditional logic to dynamically show or hide fields, and can  include headings, field validation, tables, and rich formatting. You can use forms in the portal to get more information from customers when they raise a request, use a form to create an issue, or add forms to existing issues to act as checklists or to gather new data as an issue progresses.

**Workflows**

Issues that your team can work on all transition through different stages of work – from creation to completion.  The path that your issues take is called a workflow. This can include steps like *In progress* or *Needs approval.*

**Automation**

Lighten the load and work more efficiently with automation. Automation helps you to focus on the work that matters, removing the need to perform manual, repetitive tasks by allowing your teams to automate their processes and workflows. With our simple rule builder, you can configure powerful automation rules to handle even the most complex scenarios.

**SLAs**

SLAs (service level agreements) are a powerful tool for teams to track how well they're meeting the level of service expected by their customers. Project admins can create SLA goals that specify the types of requests you want to track and the time it should take to resolve them.

**Assets**

As of 16 October 2024, usage limits will apply to Assets and the virtual service agent in Jira Service Management.

Premium and Enterprise plans also have access to Assets in Jira Service Management. It gives teams a flexible and dynamic way to track all kinds of assets and configuration items (CIs), enabling teams to easily link them to service requests, incidents, problems, changes, and workloads. This helps those teams to understand and visualise the critical relationships between applications, services, their underlying infrastructure, and other key dependencies.

**Additional features available**

If you’re using an IT service management (ITSM) project, you’ll get some extra features by default. Some of these can also be enabled for other project types under **Project settings**, then **Features**.

**Service request management**

Service requests are requests that are managed and solved by a dedicated service team. For example, a request for a new laptop for a team member. This feature gives your team access to:

* a request type dedicated to service requests
* dedicated service request queues
* service request reports

**Incident management**

As of October 16, 2024, some capabilities of this feature are only available for Premium and Enterprise plans.

Incident management is a practice used by development and IT operations teams to respond to an unplanned event or service interruption and restore the service to its operational state. This feature gives the team access to:

* a dedicated incidents request type
* dedicated incidents queues
* incidents reports
* ways to escalate major incidents prompting the right Dev and IT teams to immediately swarm and begin resolution
* the ability to link support requests directly to major incidents so support agents can see status changes in real-time

**Problem management**

As of October 16, 2024, some capabilities of this feature are only available for Premium and Enterprise plans.

When a service has vulnerabilities, incidents can occur. Problems are the cause (or potential cause) of those incidents. This feature gives the team access to:

* a request type dedicated to problems
* dedicated problems queues and problems reports
* ways to group incidents to problems, helping your team to fast-track the root cause analysis
* a place to record workarounds to minimize the impact of incidents

**Change management**

As of October 16, 2024, some capabilities of this feature are only available for Premium and Enterprise plans.

Changes are the addition, modification, or removal of anything that could have an effect on services. Change management allows your business to flag, review, and approve these changes before they can impact service quality. This feature gives the team access to:

* a dedicated change request type with an automated risk assessment workflow
* dedicated change queues
* change reports
* the ability to connect your CI/CD pipeline up to your service project so that you can track and gate deployments with automated risk assessment.

**Services**

Services holds details of the products and applications your organization uses, and the relationships between them. These can be used for a variety of features, including approving changes or knowing who to alert in the event of an incident.

**Alerts**

Alerts let your team notify the right people of incidents as they happen. This feature gives the team the ability to:

* centralize and filter alerts across all your monitoring, logging, and CI/CD tools to ensure your teams respond to issues quickly
* keep stakeholders aware of updates using multiple notification channels including SMS, email, and mobile push, and share status information with both internal and external users via direct integration with Statuspage
* create chat channels (Slack, MS Teams), setup video conferencing (via a native video bridge or Zoom) and automatically record all actions with a incident timeline
* create automation rules to rapidly investigate and remediate the incidents

**On-call scheduling**

On-call lets your team see who's rostered to be alerted about incidents. This feature gives the team the ability to customize on-call schedules, routing rules, and escalation policies to handle alerts differently based on their source and urgency.

**Feature lab**

These features let us test new ideas and gather your feedback to improve them. Give your team access to trial our newest features by going to **Project settings,** then **Features.**

**Step-by-Step Guide: ITSM Project Setup and Configuration**

**Project Creation and Initialization:**

1. **Create a New Project: Initiate a new project.**
2. **Select Project Template: Choose the "IT - General Service Management" template.**
3. **Assign Managing Team: Specify the team responsible for the project.**
4. **Provide Project Details: Enter necessary information like project name, description, etc.**
5. **Review Project Template: Verify the selected template's features and capabilities.**
6. **Create a Ticket via Web Form: Submit a new ticket using the provided web form.**
7. **Verify Ticket in Queue: Check the ticket's status in the "All Open" and "Unassigned" queues.**
8. **Create a Ticket via Email: Send an email to the configured ITSM email address.**
9. **Verify Email Acknowledgment: Confirm receipt of an acknowledgment email.**
10. **Assign and Process a Ticket:**

* **Open the first ticket.**
* **Change its status to "In Progress."**
* **Assign the ticket to a specific agent.**

1. **Check Assigned Tickets: Verify the assigned ticket count.**
2. **Resolve and Close a Ticket:**

* **Change the ticket's status to "Done."**
* **Provide a solution and reply to the customer.**
* **Close the ticket.**

1. **Close All Tickets: Ensure all open tickets are closed.**

**Project Settings and Configuration:**

1. **Configure Project Details:**

* **Set the default assignee to the Project Lead.**
* **Define user roles (Admin, Agent, Viewer) and their permissions.**
* **Note that feature availability may vary based on the chosen template.**

1. **Explore Template Features:**

* **IT Service Management (Essentials):** 
  + **Utilize queues for Incidents, Service Requests, etc.**
  + **Customize the "Report an Incident" form by adding fields in Request Types.**
* **IT Service Management (Enhanced):** 
  + **Manage Request Types (Service Requests and Incidents).**
  + **Categorize requests as Incidents (system problems, hardware failures) or Service Requests (IT help, onboarding, account requests, hardware/software requests, email requests).**

1. **Customize Queues:**

* **Create a new queue named "All Questions."**
* **Set the default group and JQL filter to identify unresolved "Ask a Question" issues.**
* **Configure status-based categorization rules.**

1. **Portal and Issue Type Configuration:**

* **Add announcements and portal groups to the project portal.**
* **Create a new issue type and add it to the "Unassigned" category.**
* **Assign request types to appropriate services.**

1. **Form Customization:**

* **Add a form template to the Request Management section.**
* **Use the "Settings" tab to configure form location and fields.**

1. **External Resources:**

* **Provide links to self-help resources.**

1. **Customer Satisfaction:**

* **Enable CSAT surveys.**

1. **Service Level Agreements (SLAs):**

* **Define and implement SLAs as discussed.**

1. **Internal Notifications:**

* **Set up internal notifications as per requirements.**

1. **Automation:**

* **Create automation rules in Global Administration to assign tickets to specific users based on defined conditions.**