JIRA Service Desk Documentation

Put the power of JIRA in the hands of your service desk team. JIRA Service Desk combines an intuitive experience with powerful SLA management and realtime reporting.

Intuitive, user-friendly experience:

Filing requests is easier than ever with the intuitive and clean interface of JIRA Service Desk's Customer Portal. Customers see exactly what they need, and nothing more, in a language that they actually understand! IT Teams get to speak in their language and customers get to speak in theirs.

Customizable queues:

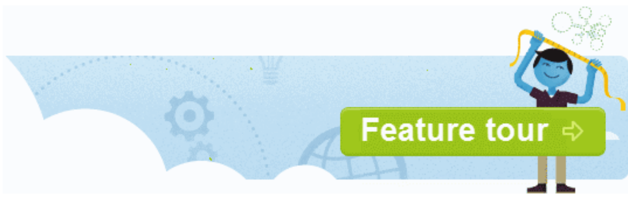
Ensure that everyone is always working on the right requests at the right time with queues powered by the amazingly flexible JIRA Query Language (JQL). Queues help your team to divide and conquer requests in real-time as they arrive. Manual triage and prioritization of your requests is a thing of the past!

Advanced Service Level Agreements:

Behind every great service desk team, you'll find great Service Level Agreements (SLAs) helping them to deliver consistent and awesome performance. With JIRA Service Desk, you can set up advanced SLA metrics, report on performance in real-time and drive your team forward with highly visible SLA targets.

Powered by JIRA:

Millions of developers around the world count on the power and extensibility of JIRA to help them to manage their work. Now, IT and operations teams can use that power too! Choose the JIRA platform for your service desk and get your software teams and your operations teams together and working in one system. One system to set up, one system to maintain, one system to learn.



Install JIRA Service Desk

JIRA Service Desk is a JIRA add-on, which makes it easy to install and set up through the Atlassian Marketplace.

Related pages

- Upgrading to JIRA Service Desk 2.0

Before you begin

- You must have the **'**JIRA System Administrators**'** global permission.
- If your JIRA instance is on a server that cannot access the internet, download JIRA Service Desk from the Atlassian Marketplace.
- JIRA Service Desk is available with the following language packs: Spanish, French, German, and Japanese.

Installing JIRA Service Desk

1. Log in to JIRA as a user with the **'JIRA System Administrators'** global permission.
2. Click the 'cog' icon on the top bar (or click **Administation** if using an older version of JIRA) and select **Add-ons**. The **Universal Plugin Manager** (UPM) page will be displayed.
3. Install the add-on.
    - If you have downloaded JIRA Service Desk, click **Upload add-on**.
    - If you haven't, search for JIRA Service Desk and install it.

   A confirmation message and the add-on details will display, if it is installed successfully.

Disabling JIRA Service Desk for a project

After you've installed JIRA Service Desk and began using it, you can disable a service desk for any specific project without uninstalling JIRA Service Desk. To disable a service desk for a project, go to the project administration page and use the **Service Desk** page to disable it.

Supported Platforms

This version of JIRA Service Desk is compatibile with the following versions of JIRA:

- 6.3.8 or later

JIRA Service Desk is installed as a JIRA add-on (plugin), hence JIRA Service Desk is supported on all platforms that are supported by JIRA.

Getting started with JIRA Service Desk

JIRA Service Desk overview

As introduced in this tutorial, JIRA Service Desk combines the productivity and power of the JIRA platform with an intuitive user experience that your service teams can use to successfully maintain your focus on the customer. Throughout this tutorial, we will reference the example of a new customer who uses JIRA Service Desk to send requests to his company's IT Team so he can get settled in his new role as quickly as possible. Here's how the customer and a service desk agent would work together to resolve a request using JIRA Service Desk:

1 - Customer needs assistance and submits a request to JIRA Service Desk.

2 - Service desk agent picks up the issue.

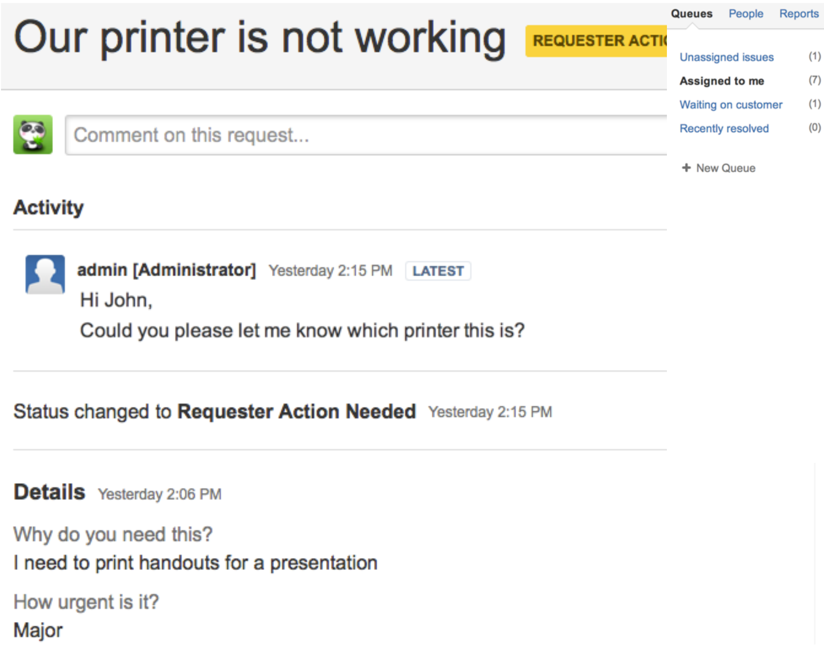
3 - Customer and service desk agent discuss the problem.

4 - The customer is satisfied and the service desk agent resolves the issue!

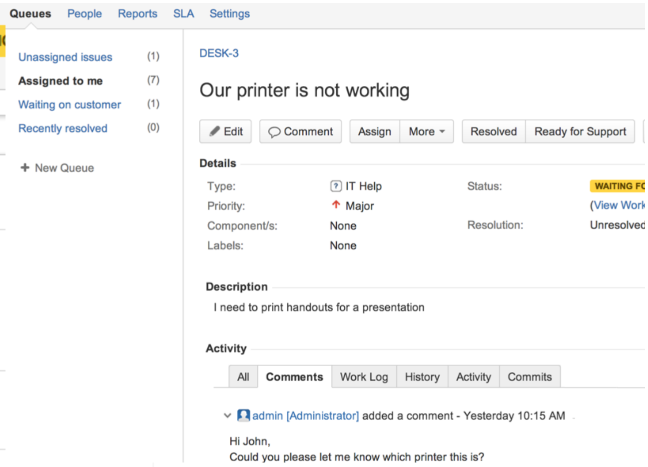
Request vs. issue

A JIRA Service Desk **request** is what your customer submits to your service desk, while an **issue** is what an agent works on internally.

Customer view of a **request** in the Customer Portal:



Service desk team view of an **issue** in JIRA:



JIRA Service Desk roles

There are four main roles in JIRA Service Desk: administrator, agent, collaborator and customer. This guide focuses on the administrator, who sets up and configures JIRA Service Desk projects, and the agent, who works out of the preconfigured service desk projects.

Admin

User with administrative rights for your service desk who can:

- Access all features in JIRA Service Desk
- Add and remove users to and from service desk projects
- Configure the Customer Portal, request types, queues, reports and SLA metrics
- Perform all tasks outlined in Admin and Agent tutorials

Agent

User who works on and resolves customer requests who can:

- Access the internal service desk interface
- View the Customer Portal, queues, reports and SLA metrics of assigned service desk projects
- Add, edit and delete customer-facing and private comments on issues
- Manage knowledge base content

Ready to dive into JIRA Service Desk?

Click on the admin or agent buttons below to proceed.

I am a service desk admin

I am a service desk agent

Getting started for service desk admins

Welcome to JIRA Service Desk for admins! In this tutorial, we'll introduce you to your workspace and walk you through the process of setting up a service desk project for your team of agents and a corresponding customer-facing site (which we call the Customer Portal). We'll be focusing on basic JIRA Service Desk features and tasks to help you get up and running quickly. By the end of this tutorial, you will have:

- Set up 1 service desk project
- Added 3 agents
- Prepared your Customer Portal to receive customer requests

Audience:

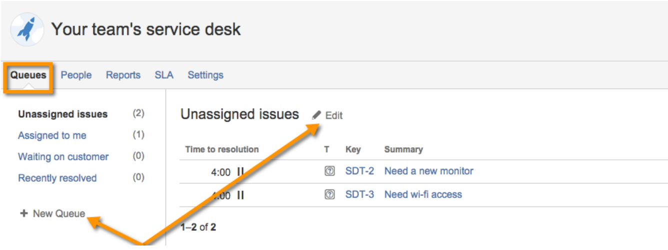
- Service desk administrators
- Team managers

Time: 30 minutes

A quick look at JIRA Service Desk:

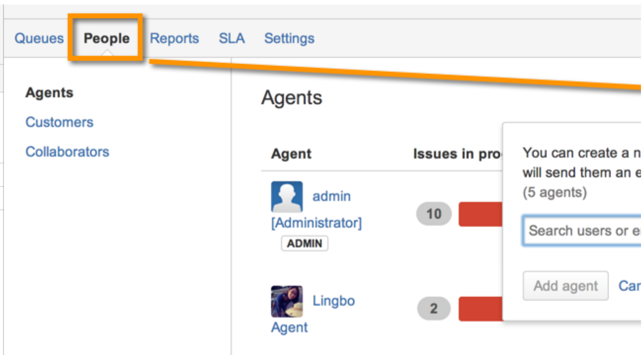
1 - Queues

As an admin, you will set up and configure queues for your agents. Your agents can then view and work on issues that have been triaged into these queues from this tab.



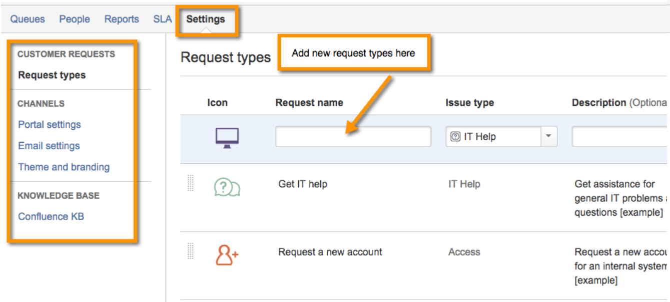
2 - People

This is where you can add new agents, customers and additional admins to your project. You can see what each user group has permission to access.



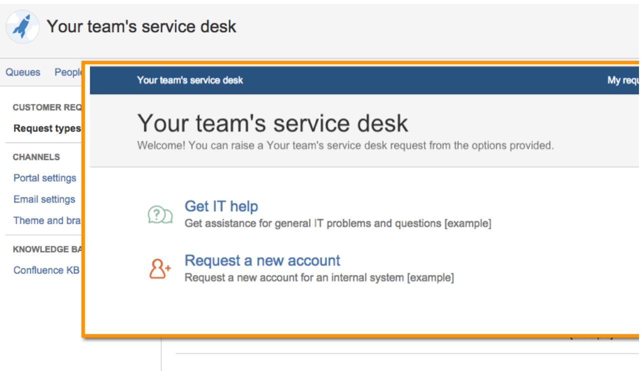
3 - Settings

This is where you will administer request types, email communication channels and workflow statuses for your team. You will also be able to customize the theme and branding of your Customer Portal.



4 - Customer Portal

This link lets you view and navigate the customer view of your service desk project.



Now that you are familiar with your service desk workspace, you can set up your own JIRA Service Desk site and add your first project.

Getting started home

Next

Set up your service desk

STEP 1 OF 5

Let's get your service desk ready to use by setting you up with a JIRA Service DeskCloud site. Cloud is our hosted offering and will allow you to set up your own site without installing a thing!

Sign up for a JIRA Service Desk site

*If your team has an existing site, your administrator should have already granted you access to the project you will be administering. Simply skip to the bottom of this page and click **Next** to continue.*

Signing up for JIRA Service Desk Cloud will provide you with a fully-functional JIRA Service Desk site for one month.

1. Open this link in a new tab to view the signup page directly:
2. Follow the signup form steps to enter your site URL and admin username.
3. Once you have completed the signup process, grab a quick coffee (or tea, if that's your preference) — it will take about 10 minutes for your JIRA Service Desk Cloud site to be created. You will receive an email when your site is ready.

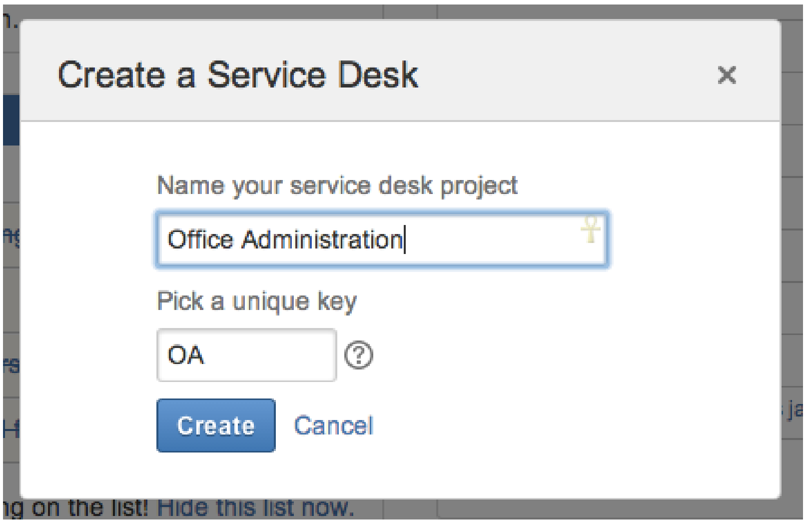
Can't use Cloud?

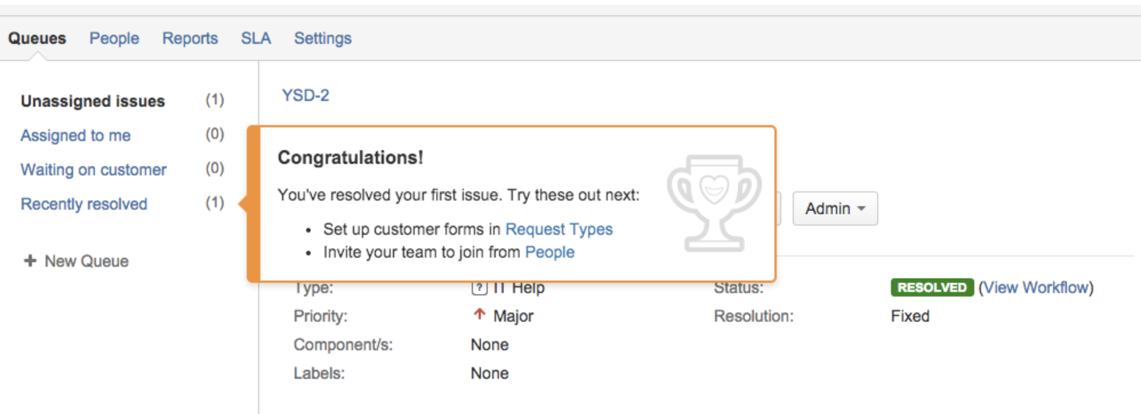
If you cannot use JIRA Service Desk Cloud, instructions for installing JIRA Service Desk Server are available below.

- Installing JIRA on Windows
- Installing JIRA on Linux
- Installing JIRA on Mac OS X

Create a project

JIRA Service Desk uses JIRA projects as the basis for the service desks you create. You can set up separate projects for teams that have different configuration requirements and request types. Let's get you set up with one project for a team managing office administration requests.

1. Click the link from your Welcome email to set your administrator password and log into your new site.
2. Click **Service Desk** in the top navigation bar of your site and select "Create a Service Desk".
3. Select "New Service Desk Project". Choose a name and key for your project and click **Create**:


4. Click **Get started** on the Welcome to JIRA Service Desk page. You will be led through a quick interactive product tour.
5. Come back to this tutorial when you have landed on this screen in your service desk site:


Nice work! You now have a service desk site with one project. You will now learn to set up request types, which define the requests customers can submit to your team's service desk project.

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Create your service desk request types

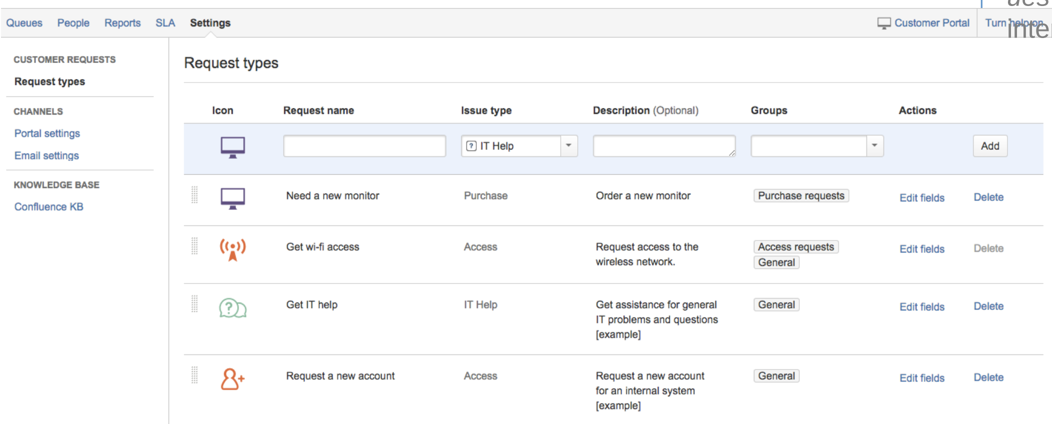
STEP 2 OF 5

Request types let you define and organize incoming issues so your service desk team can more efficiently help your customers. If you're moving from an existing help desk application, you can add your existing request categories during this step. If you're setting up service desk request types for the first time:

- Think about how your customer would write a request (e.g. 'Need a new monitor' vs 'Hardware Request');
- Break things down into smaller chunks (e.g. 'Help with printer configuration', 'Help with laptop problems', 'Help with software problems'); and
- Avoid specialist terminology (e.g. 'I need access to a system' vs 'Deploy SSH key').

> **Requests vs. Issues**
> Remember that customers submit *requests* to your service desk and your team picks up the corresponding *issues* to work on internally.

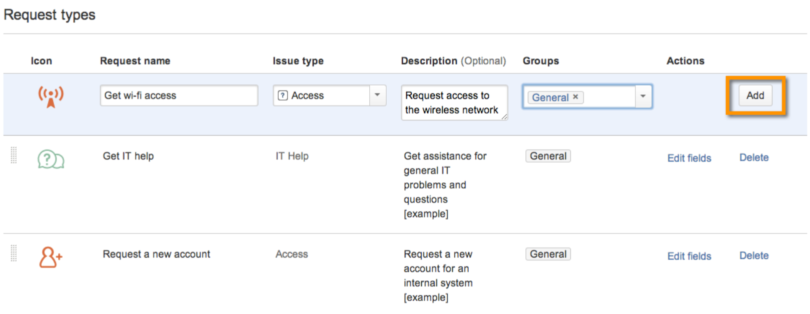
Here's what your request types page will look like by the end of this step:



Create new request types

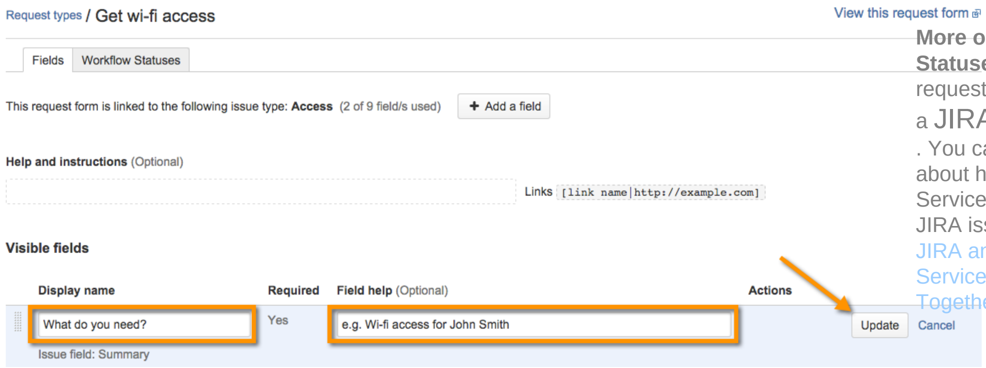
Your site comes with preconfigured request types (e.g. "Get IT help" and "Request a new account"), but let's go ahead and add more to give you more practice.

1. Click the **Settings** tab in JIRA Service Desk. You'll end up on the **Request types** tab by default.
2. Create a new request type, "Get wi-fi access", by filling in the **Icon**, **Request name**, **Issue type**, **Description**, and **Groups** fields as shown. Click "Add" when finished:

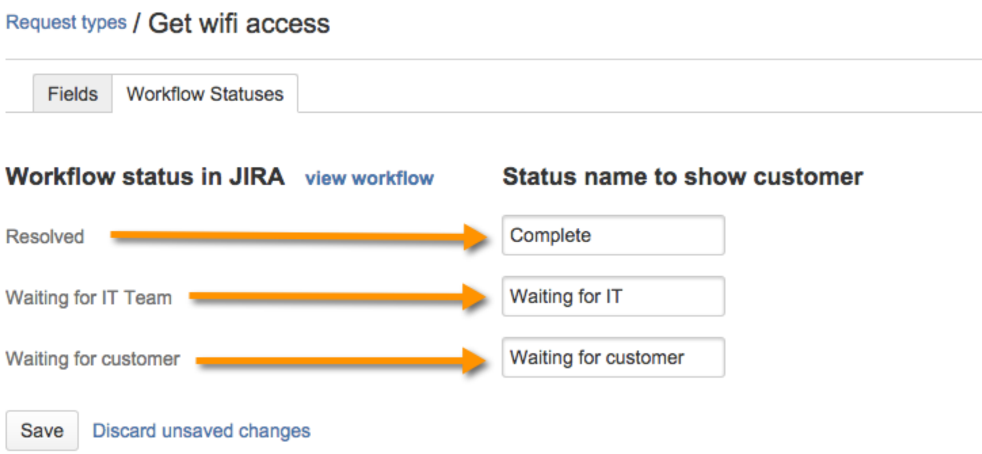


3. Click **Edit fields** to change the request form fields that show up in the Customer Portal. These simplified fields help customers understand what information they need to provide when submitting a request.
4. The "Summary" field should already be displayed in the **Visible fields** section. Click th e **Add a field** button and select the "Priority" field to add this to the "Get wi-f- access" request form.
5. Edit the **Display name** and **Field help** of the "Summary" field as shown. Click "Update" when finished:

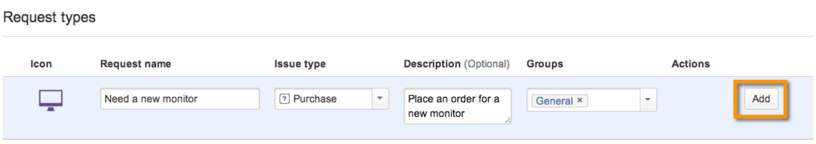
More on Workflow Statuses: Each request type maps to a JIRA issue type . You can read more about how JIRA Service Desk uses JIRA issues in How JIRA and JIRA Service Desk Work Together.



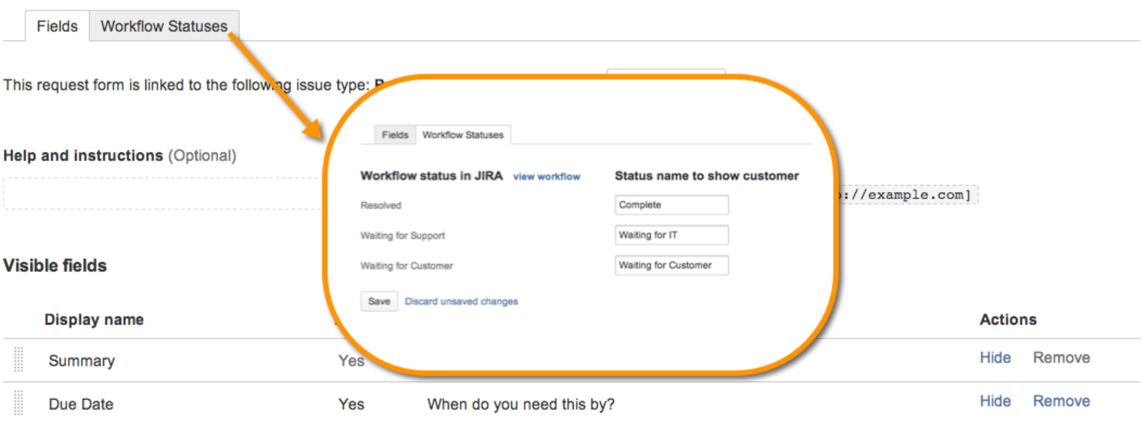
6. Click the **Workflow Statuses** tab. The default JIRA workflow status names for the "Access" issue type will be displayed on the lefthand side. You might want to change how these statuses appear to the customer filing a request. Enter the following simplified status names on the righthand side as shown:



7. Click the **Request types** tab to add one more new request type, "Need a new monitor" with the following details:



8. Click **Edit fields** for this new request. On the **Fields** tab, add the required "Due Date" field (the "Summary" field will already be displayed).
9. On the **Workflow Statuses** tab, revise your workflow status names as shown below:



Organize your requests with groups

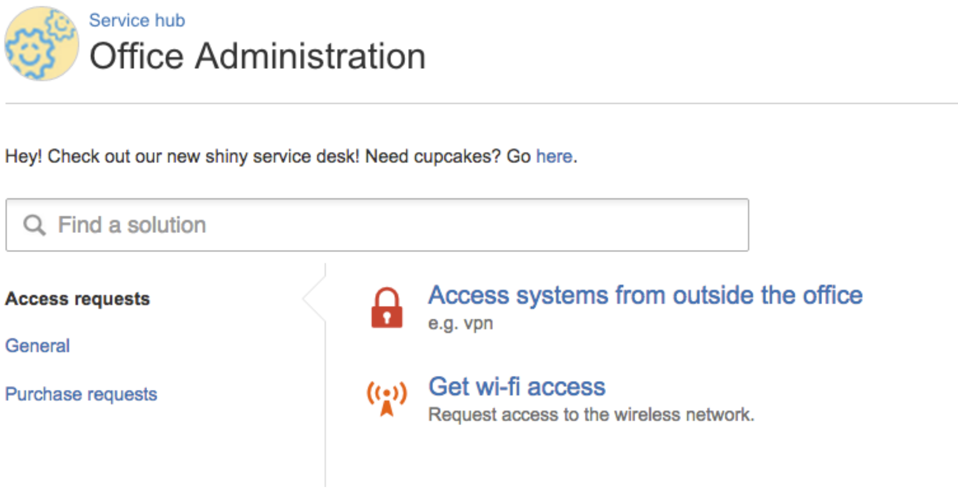
A group is simply a label you can assign to each request type. Your request types will then be organized into tabs in the Customer Portal based on these assigned groups. To add groups:

Tip: We think groups are helpful if you have seven or more request types.

1. Click the **Settings** tab and then use the **Groups** column to change the following groups for each request type:

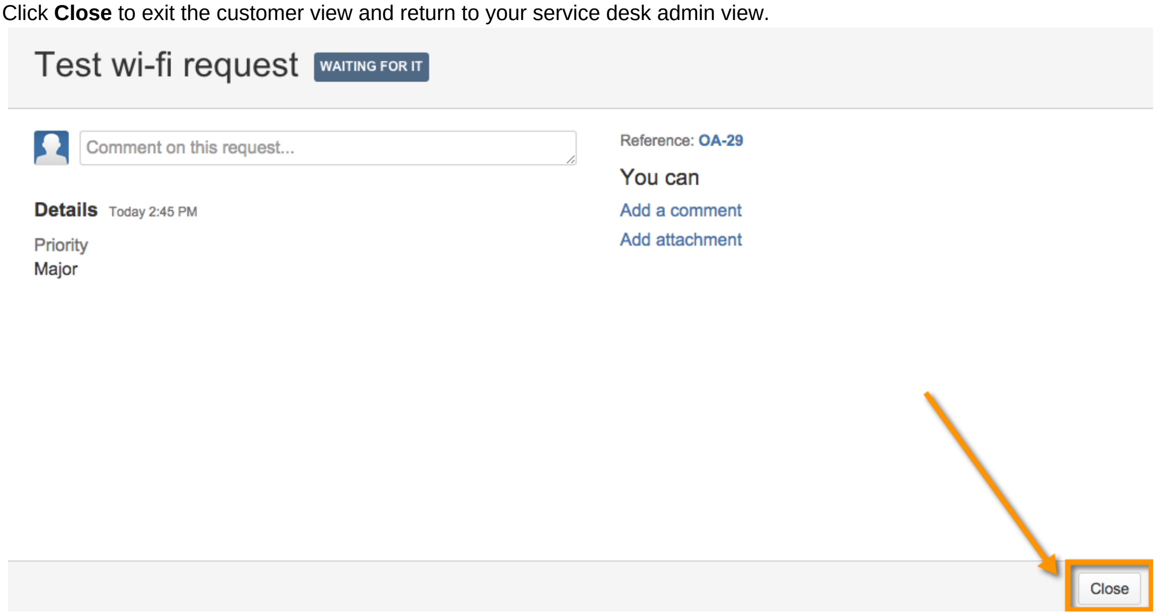
Request Type	Group
"Need a new monitor"	Purchase requests
"Get wi-fi access"	Access requests
"Get IT help"	General
"Request a new account"	Access requests

2. Assign two groups (*General* and *Access Requests*) to the "Get wi-fi access" request to make this request type appear on two tabs in the Customer Portal and therefore easier to find.
3. Click the **Customer Portal** link to see how JIRA Service Desk automatically sorts your request types into tabs based on the groups you have added:



Create a request from the Customer Portal

1. Stay in the **Customer Portal** view so you can create test requests from a customer's view.
2. Click "Get wi-fi access" and enter "Test wi-fi request" in the Summary (or "What do you need?") field.
3. Click **Create** to view the open request in the Customer Portal.
4. Click **Close** to exit the customer view and return to your service desk admin view.



Excellent work! You now have four request types and another test issues in your project. Next, you will learn how to sort these issues into queues, which will allow you to manage your team's workload.

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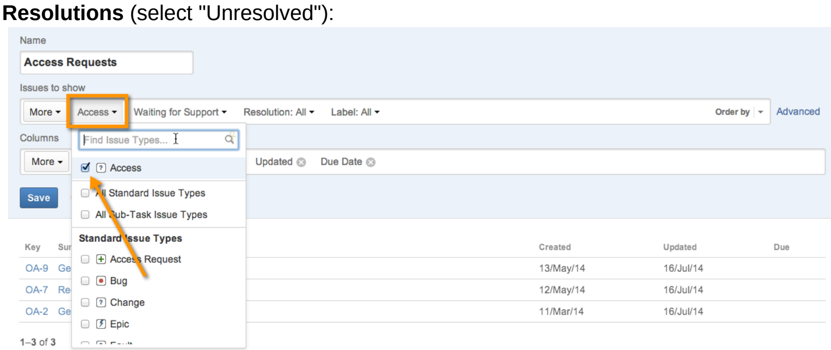
Make queues for your service desk teams

STEP 3 OF 5

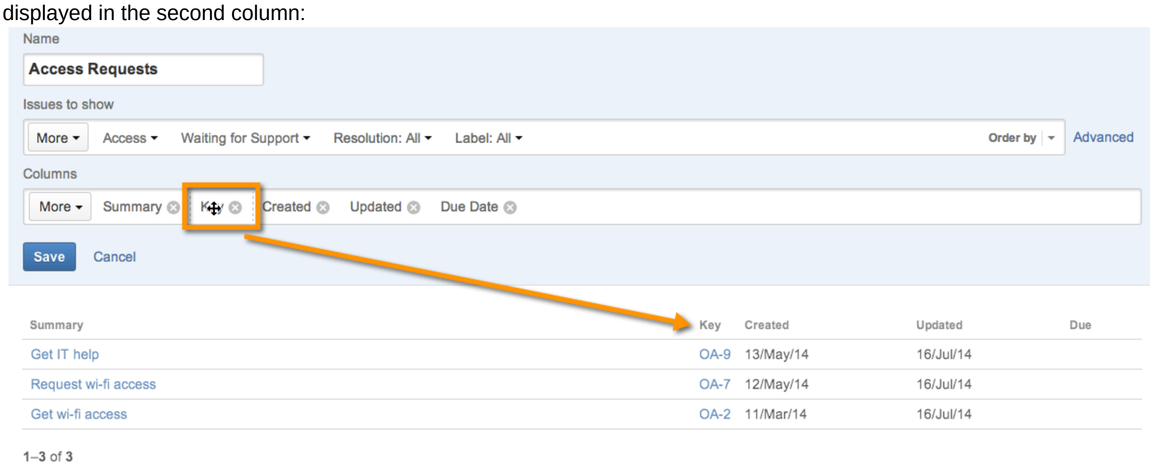
Your teams will spend the majority of their time working out of the queues you set up. Agents do not have the permissions to add new queues or configure existing ones; however, JIRA Service Deskqueues allow you to automatically triage and prioritize issues for them. If you want your team to focus on requests that must be completed by next week, for example, you can set up a queue that only contains requests with a set due date in that week.

Your instance comes with preconfigured queues (e.g. "Unassigned issues"), but let's go ahead and create three new queues for your team:

1. Click the **Queues** tab and then select **New Queue**.
2. Name your first new queue "Access requests".
3. Define the issues you want to appear in this queue by selecting the following drop-down menus: **Type** (select "Access"); **Status** (select "Waiting for IT Team"), and **Resolutions** (select "Unresolved"):

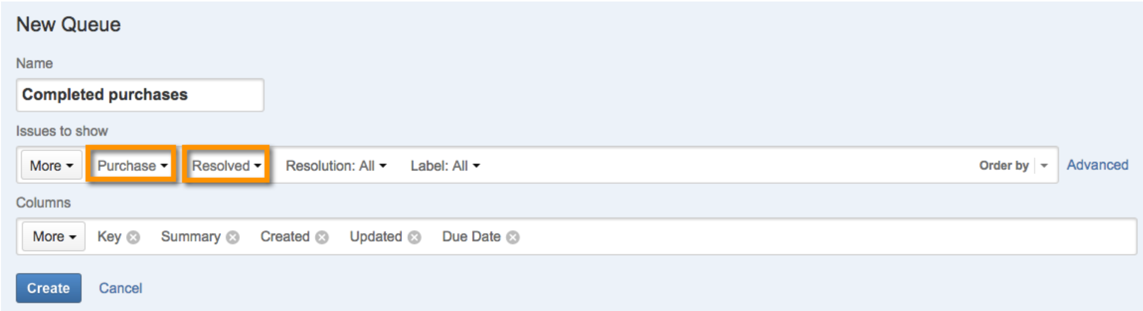


4. Select the following columns names that will display in this queue from the **More** menu: "Key", "Summary", "Created", "Updated", and "Due Date". You can reorder the columns by dragging the name (e.g. "Key") across the column field. Drag "Key" so that it is displayed in the second column:

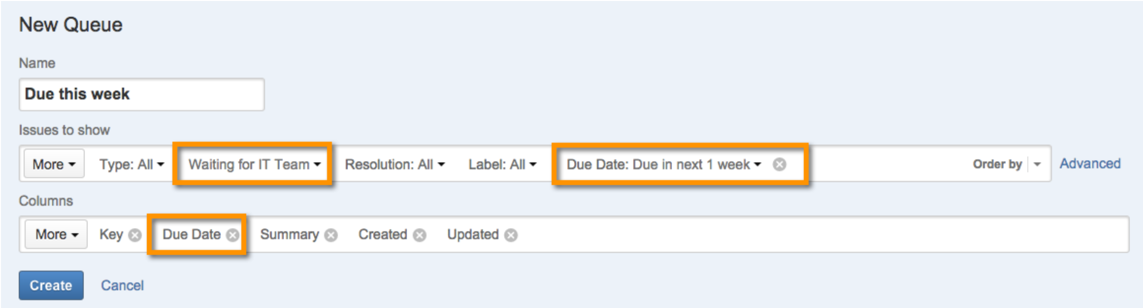


5. Click **Create** to add this queue to your team's workspace.
6. Create two new queues with the following two search queries:

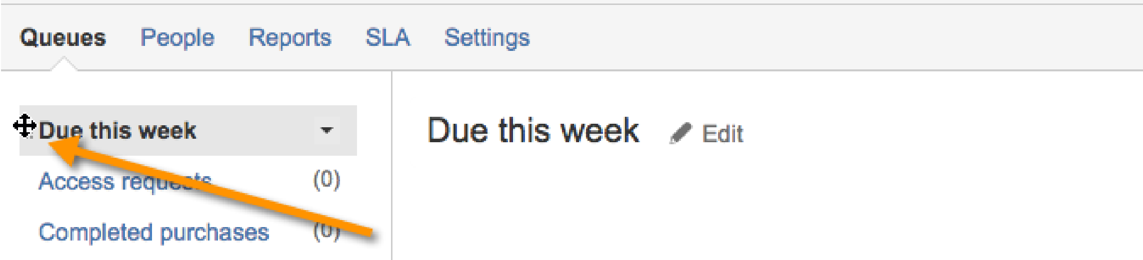
"Completed purchases" for purchase requests that have been successfully resolved



"Due this week" for requests that must be completed in the next week



7. Reorder your saved queues by clicking and dragging them as shown:



You now have three new queues in your project! You will next learn how to add agents to your instance, so you can get your teams up and running with JIRA Service Desk.

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Add your service desk agents

STEP 4 OF 5

There are four user roles you can assign in JIRA Service Desk:

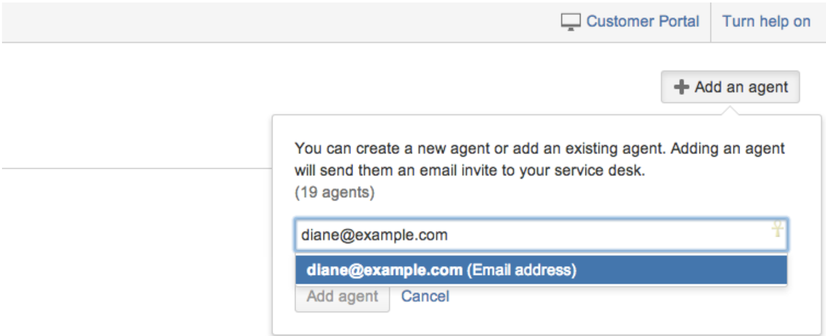
- The **customers** who create requests via email or the Customer Portal
- Your team members, or **agents**, who view and respond to these requests
- A **project administrator**, or an agent with administrative capabilities for one project
- People outside your team, or **collaborators**, who occasionally assist agents with requests

Add your agents

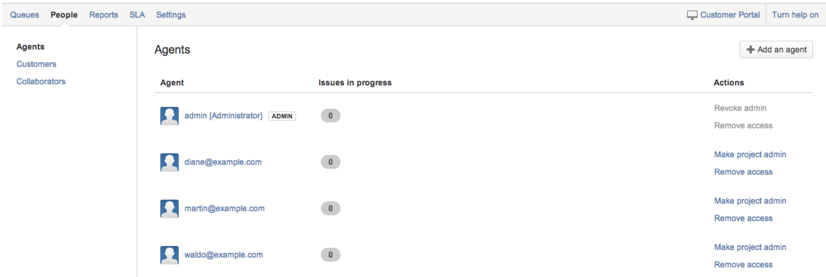
If you are a project administrator, you will need to contact your site administrator to add new agents to your project.

Let's start by creating three agents - **Diane**, **Martin**, and **Waldo**:

1. Select the **People** tab - you will land on the **Agents** section by default - and click **Add an agent**.
2. Enter Diane's email address and click **Add agent**:



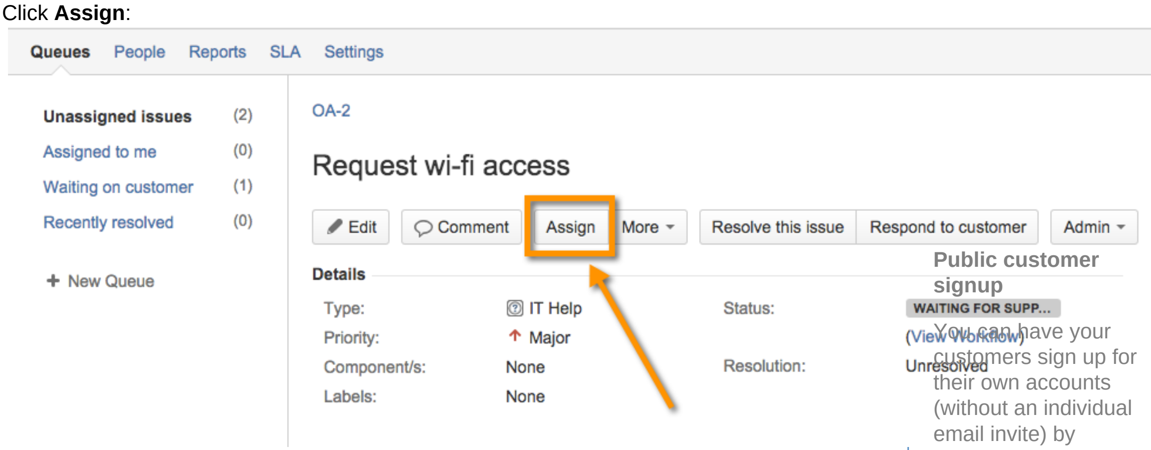
3. Repeat the first two steps to add your additional agents, Martin and Waldo:



Assign issues to agents

Your agents will generally work out of certain queue that has issues automatically triaged into it; however, let's test out manually assigning issues in case you ever come across a customer request that you want a certain agent or team to handle.

1. From the **Queues** tab, select one of your test requests.
2. Click **Assign**:



Public customer signup

You can have your customers sign up for their own accounts (without an individual email invite) by enabling public signup.

3. Type Waldo's username into the "Assignee" field and click **Assign.**
4. When Waldo signs into JIRA Service Desk, this issue will appear in his personal queue.
5. Assign another test issue to Diane.

Add your customers

You do not need to add customers to your service desk site during this tutorial but let's check out where you would add them so you're familiar with the needed steps:

1. In the **People** tab, click the **Customers** section.
2. Click the **Invite customers** button to enter individual customer email addresses
3. Invited customers will receive an email invitation with a link to your Customer Portal, where they can complete the signup process.

You're almost done! You have now added 3 agents to your service desk project and reviewed the process of assigning issues

to these agents and inviting customers to your service desk proejct. You can now customize your Customer Portal and share it with the rest of your team.

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Customize and share your service desk

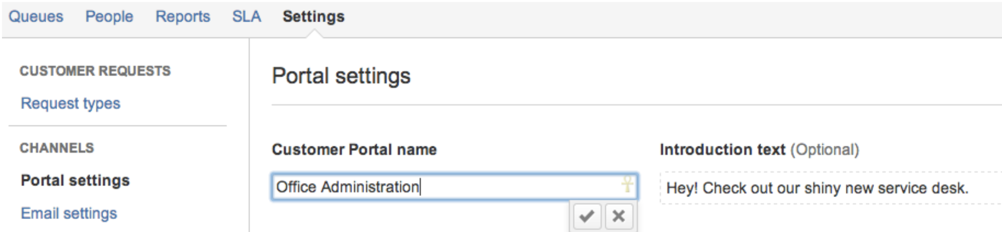
STEP 5 OF 5

The customers you have added to your service desk project can file requests in two ways. They can log in and file a request via the Customer Portal or send an email to an email address that you have linked to this service desk project. Let's finish setting up the Customer Portal and add an email channel so your customers can take advantage of both communication methods.

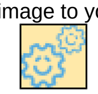
Customize theme and branding of your Customer Portal

You can now rename your Customer Portal and add a logo so customers can quickly associate this service desk with your team and company when they log in to file a request.

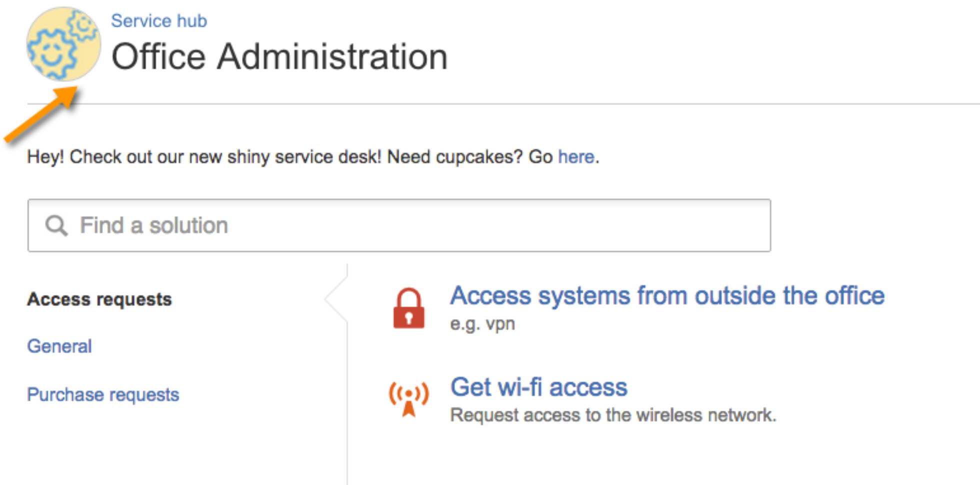
1. From the **Settings** tab, click **Portal settings**.
2. Add your Customer Portal name and introduction text by typing in the outlined fields:



3. Choose the "Use a custom logo for this Customer Portal" option.
4. Right click the sample image below to download it to your computer. You can then click the "Choose logo" button to upload this image to your Customer Portal:



5. Click **Save logo**.
6. Click **Customer Portal** to view your changes from the customer view:

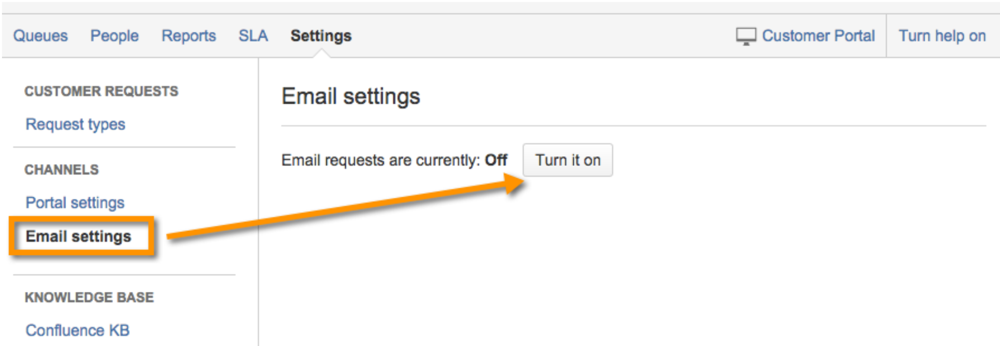


Set up an email channel

In addition to filing requests through the Customer Portal, customers can have the option of opening requests and communicating with your agents via email (e.g. helpdesk@example.com). Set up an email channel to enable this second communication option.

> **Tip:**
>
> If you use POP, make sure the email account you choose for this channel has an *empty inbox* so you do not lose any existing emails.

1. In the **Settings** tab, click **Email settings**.
2. Email requests will be default be set to "Off" so click the **Turn it on** button:



3. Select your email service provider and enter the email account login credentials as requested.
4. Look out for the test email that will be sent to your email inbox and the corresponding request that will be created in your service desk project.

Publicize your service desk

Now that your service desk project is ready to receive requests, you can share the service desk email address (e.g. helpdesk@example.com) and a direct link to the Customer Portal with your customers.

You can give one or both of the following URLs to your customers.

- The URL to a specific portal as appeared in your service desk. You'd give this URL to your customers if you've enabled public signup and want them to signup for accounts. The signup link only appears on each individual portal.
  To copy the URL of a portal, click the **Customer Portal** link again if you closed the above window. Your Customer Portal URL will be displayed above your new logo.
- The URL to the global portal where your customers will see all the service desks they have access to.

  The URL is:

  ```
  http://<computer_name_or_IP_address>:<HTTP_port_number>/jira/servicedesk/customer/portals
  ```

You can choose to:

- Post a link on your intranet
- Add a hyperlinked button to your web portal
- Email your customers and let them know about the new, easy way to get help!

Congrats! Your service desk project is now complete.

Previous

You can now continue on to learn about 1) how your customers will use your service desk and 2) more advanced tips that will help you better manage your customer requests and team workloads.

Get your customers started »

Advanced service desk tips »

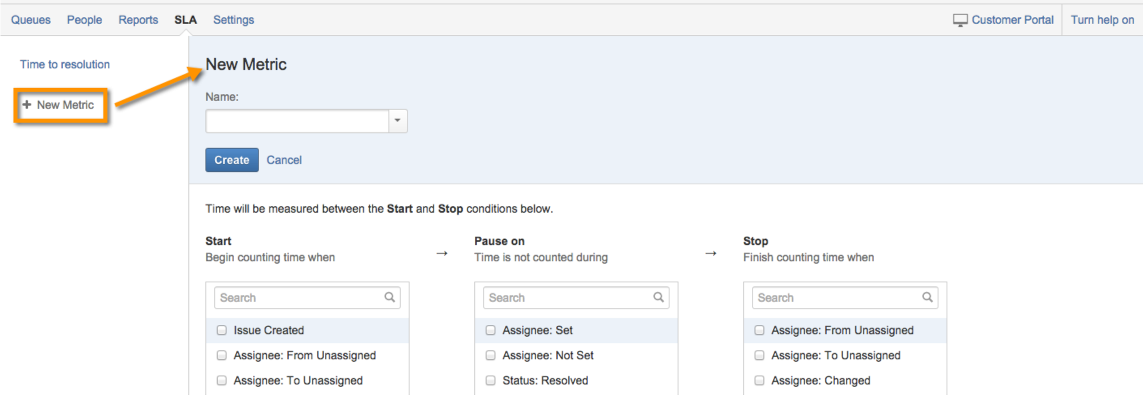
Bring your service desk to the next level

Now that you have your basic service desk up and running, you can learn about the following advanced features.

Serve your customers and your team better with SLAs

Service-level agreements (SLAs) help you communicate service agreements to your customers and keep track of your team's performance. An SLA consists of a time metric and a corresponding goal or target. As the administrator, you can configure each SLA metric and goal using the JIRA Service Desk SLA designer. SLA information will appear in both the customer-facing request and the internal issue. Your agents can also view the **SLA** tab in their JIRA Service Desk workspace so they can easily reference their performance goals. Let's have a quick look at the **SLA** tab.

1. In the **SLA** tab, click **New Metric** to create a new SLA metric for your service desk project.

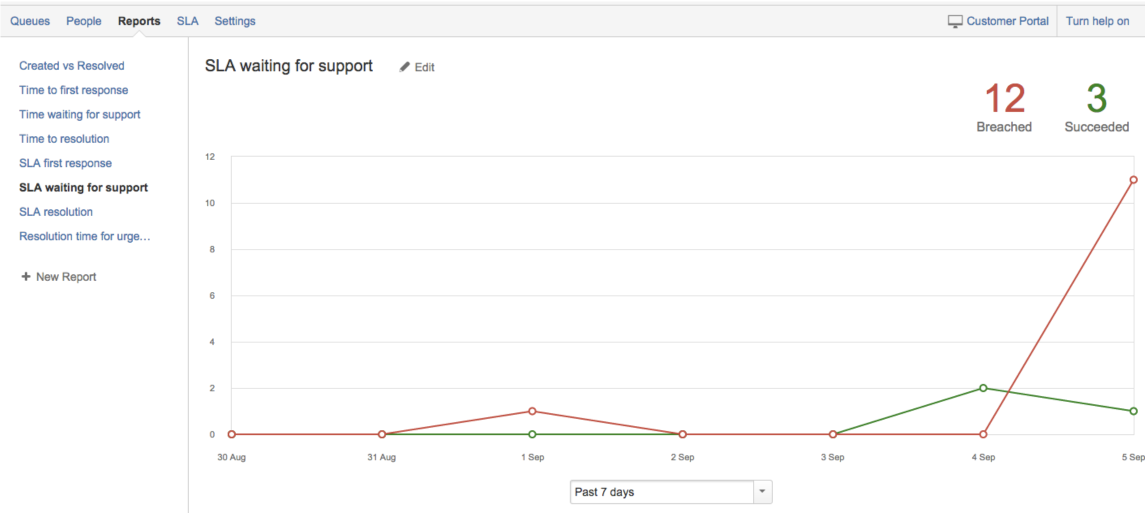


2. For more information, open SLAs in a new window or tab in your browser.

Track your team's success with reports

JIRA Service Desk lets you display selected SLA metrics and goals in interactive reports. Reports can be used to help you visualize your team's performance so you can identify bottlenecks and optimize your team's workload. Your team of agents can then view the read-only versions of your reports to see how they are tracking towards their goals. Let's now have a quick look at the **Reports** tab.

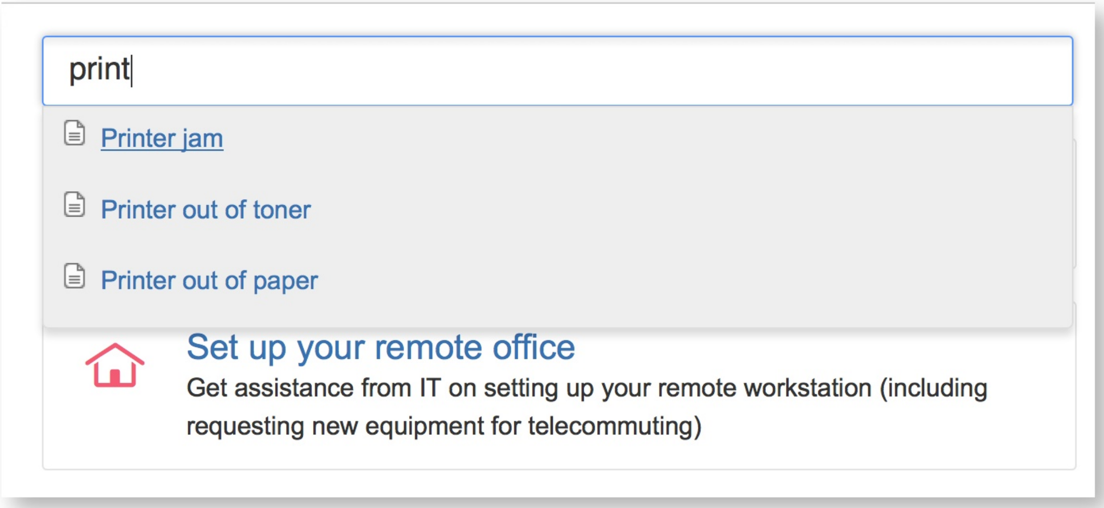
1. Click the **Reports** tab to view the pre-configured reports in your project.



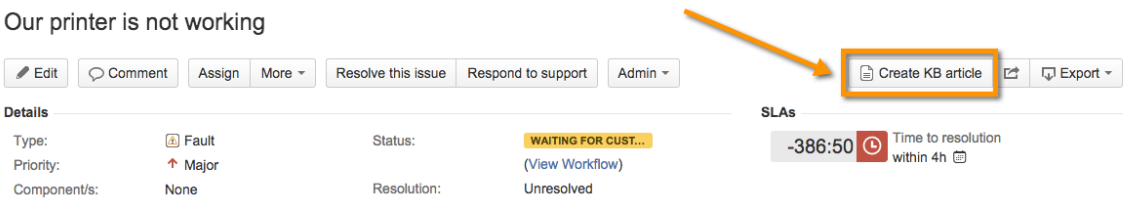
2. Click **New Report** to create a new report or simply edit the pre-configured reports in your project.
3. For more information, open Reports in a new window or tab in your browser.

Increase self-service with knowledge base integration

By connecting Confluence to your service desk project, you can help customers help themselves. Your customers can search for solutions to their problems in the Customer Portal before they finish filing a request:

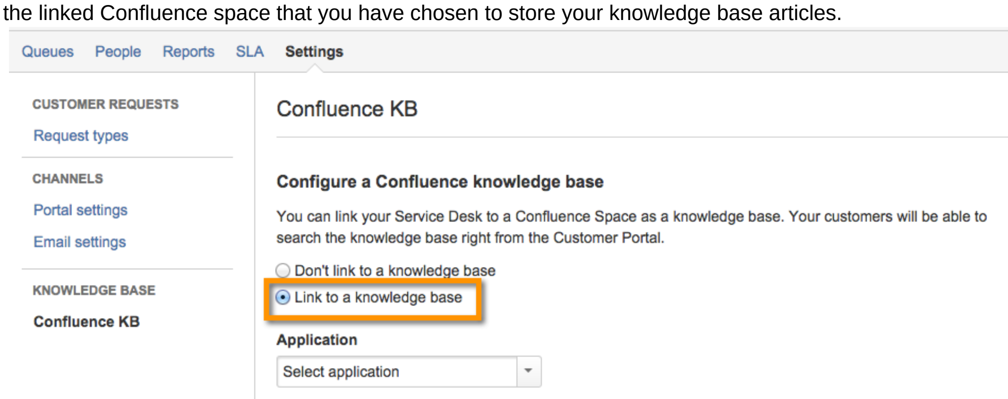


Your agents can also take advantage of knowledge base integration by saving their issues as articles for future reference:



These KB articles will be a good resource for new agents in your service desk project and will help prevent existing agents from having to create the same response over again for related issues types.

1. Open providing self-help resources for your customers with a knowledge base in a new tab to learn about setting up an application link between your Confluence and JIRA Service Desk sites.
2. In your service desk project, click the **Settings** tab and then **Confluence KB**. Choose "Link to a knowledge base" and then the the linked Confluence space that you have chosen to store your knowledge base articles.



3. Your agents will now see the **Create KB** button when you open customer requests and your customers will be able to search for existing KB articles in the Customer Portal.

Want to learn more? Proceed to the documentation home linked below!

Previous

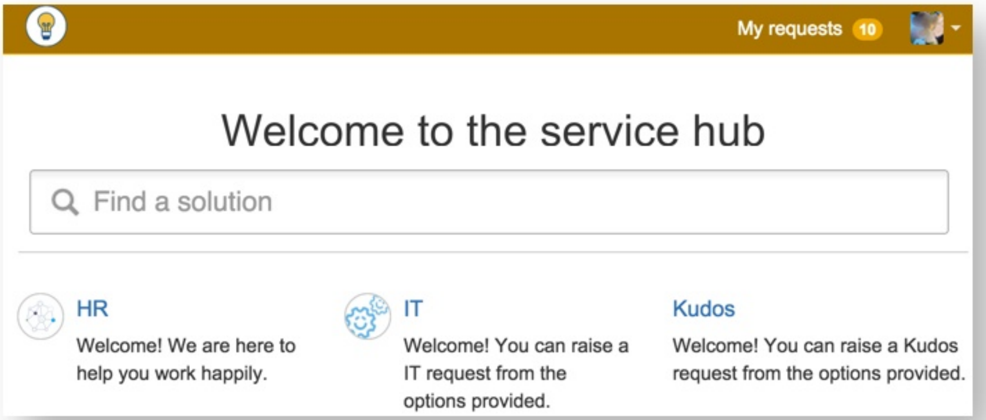
Service desk docs »

Get your customers started with JIRA Service Desk

After you set up your service desk in a way that serves both your agents and your customers, it's time to show your customers how to start using JIRA Service Desk and get their requests fulfilled.

Create requests through the Customer Portal

1. Visit the Customer Portal.
2. Pick an option that matches what you need and fill in the details of the request.



Create requests by sending emails

Another way of creating requests is by sending emails to a service desk. Ask your service team if they support the email channel and if they do, just email them directly from your inbox and all the communication thereafter can happen there too.

Create requests in multiple service desks

To put the same request in multiple service desks, you have the following options:

- If all of the service desks you want to put the request in use the email channel, you can easily create the request by sending one email message to all service desks' email addresses.
- If not all of the service desks support the email channel, you need to create the request in the service desks one by one, either through their customer portal or sending emails.

Track and comment on requests

The Customer Portal shows all the information about a request and you can check a request's status and read updates from agents as they come in. You can add comments to requests on the Customer Portal as well.

Another way of tracking requests is through email notifications. You receive email notifications when agents respond to your requests and when requests' status changes. To add comments to requests, you can just reply to the email notifications and your reply will be added as a comment to the request in the system.

Want to learn more? Proceed to the JIRA Service Desk documentation home linked below!

Service desk docs »

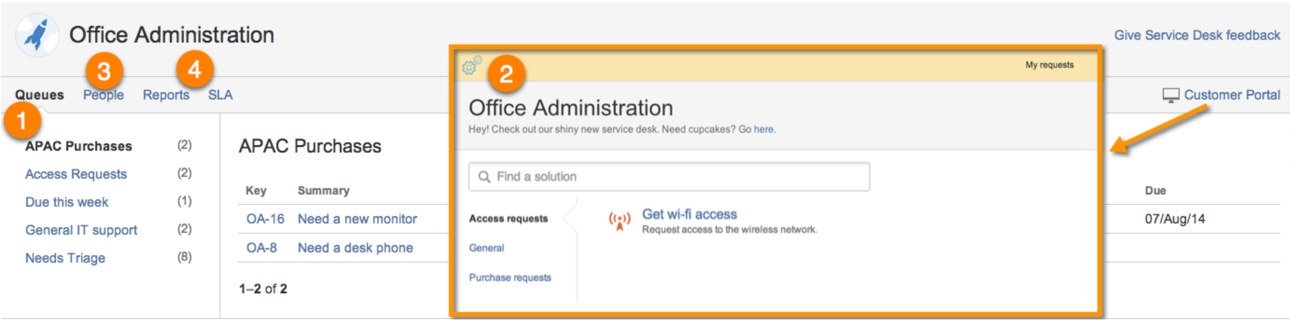
Getting started for service desk agents

On this page, we will introduce you to your workspace and walk you through the process of responding to your customers' requests.

[Navigate your workspace] [Work on customer issues] [Capture knowledge]

Navigate your workspace

Open JIRA Service Desk in your web browser. Take a few minutes to become familiar with the layout:



1 - Find your customer issues

The Queues tab displays issues filed by your customers. These issues appear in the order as configured by your service desk administrator.

2 - Become familiar with how your customers see the service desk

The Customer Portal link lets you see and interact with your service desk from a customer's perspective.

3 - Search for service desk users

From the People tab, you can search for existing customers in your service desk project, invite new customers (if public signup is enabled), and see how many issues each of your agents is working on in case issues need to be redistributed.

4 - Track your performance

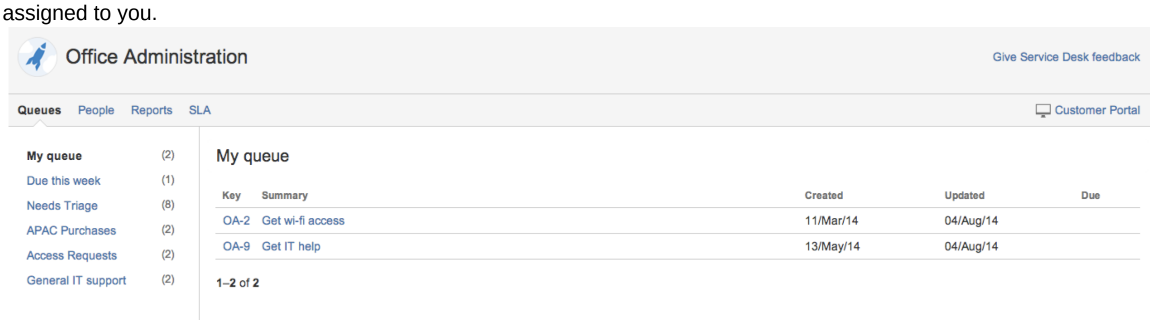
The Reports and SLAs tabs display your team's work against the expected response and resolution times of customer requests as set by your administrator.

Work on customer issues

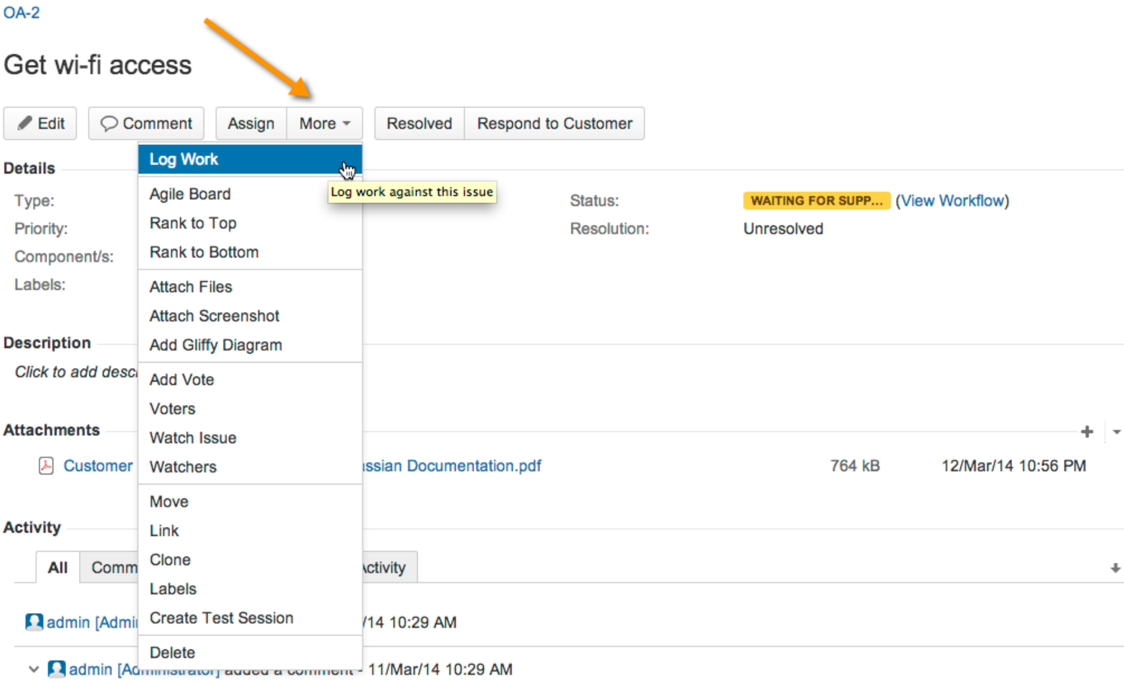
Your administrator has already set up customized queues to help organize incoming customer requests. Please contact your administrator if you need to change a queue's configuration or add a new queue.

Open an issue

1. Click the **Queues** tab.
2. You will see the preconfigured queues set up by your administrator. Click **My queue** to see the customer issues that have been assigned to you.



3. When you see the issue you need to work on, click the issue's Summary or Key to review the customer's request.
4. In addition to being able to edit and comment on a request, you can view a list of actions from the **More** menu. Hover over each action to display a brief explanation:

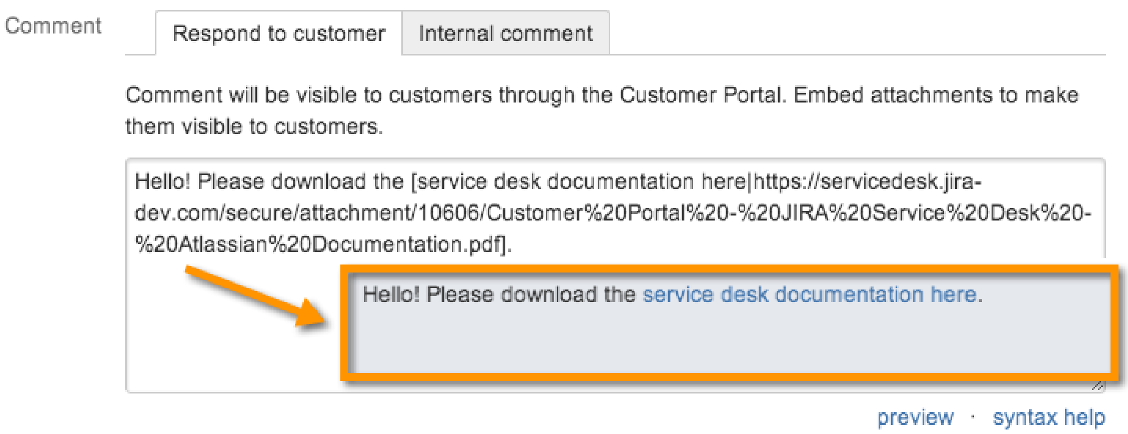


Respond to the customer

1. Review the issue and perform the needed task (e.g. grant the customer wi-fi access). Then click the **Respond to Customer** butt on to type your response and preview it.
2. Use the **Internal comment** tab to write your own note or to include another colleague on the issue by using the "@ mention" feature (type @username) and writing your comment:

3. Attach a file by clicking the **More** menu at the top of the issue and selecting **Attach**.
4. To ensure that the customer sees the attachment, right click on the attachment to *copy link address* and paste the link into a comment surrounded by *square brackets* as follows: **[**description of attachment**|**attachment link**]**. Click **preview** to confirm the

attachment link has copied correctly:



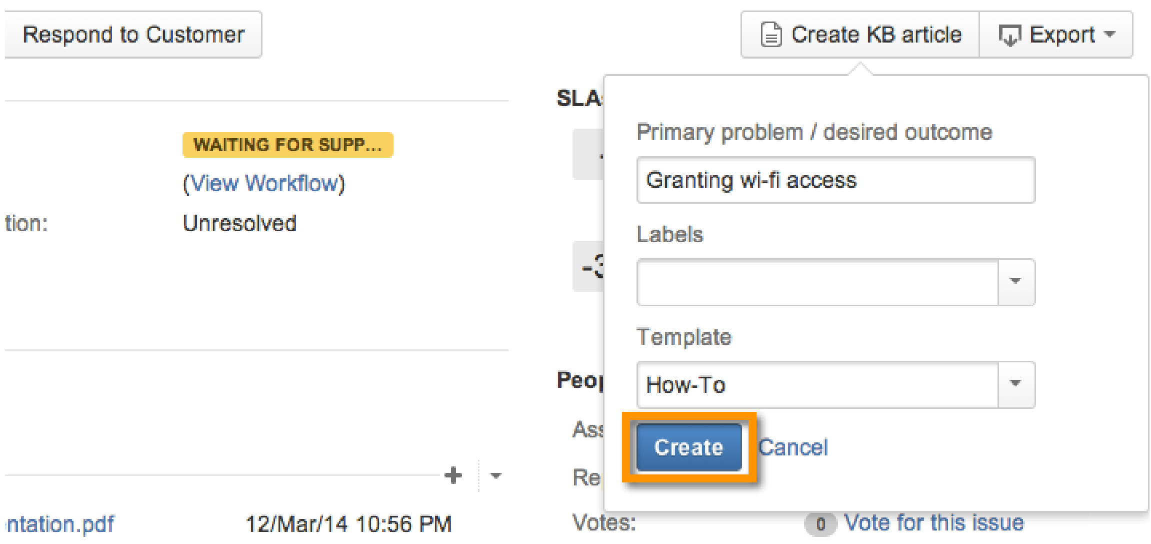
Resolve an issue

The customer receives a notification of your response via email and can then respond directly through that email channel or by following the link to your service desk's Customer Portal. Once the customer's request is completed, you can click the **Resolved** button to close the issue and the issue will disappear from your queue.

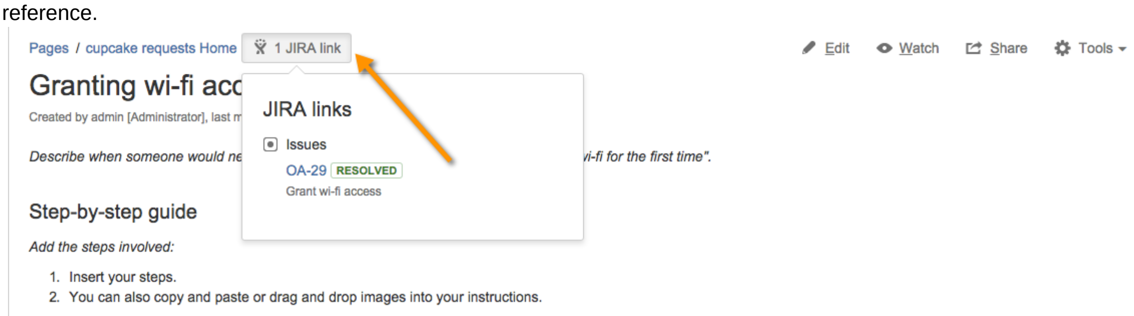
Capture knowledge

If your administrator has linked your service desk with a Confluence space, you can capture your response as a knowledge base article. You can then easily reference this article when responding to a similar issue in the future. KB articles will also appear in the Customer Portal, directing customers to relevant information before they even finish submitting their requests.

1. Click the **Create KB article** to enter the primary problem/desired outcome (or page title) and select the page template (How-To).



2. Fill out the How-To template and save the page in Confluence. You will see that your issue is linked to this article for future reference.

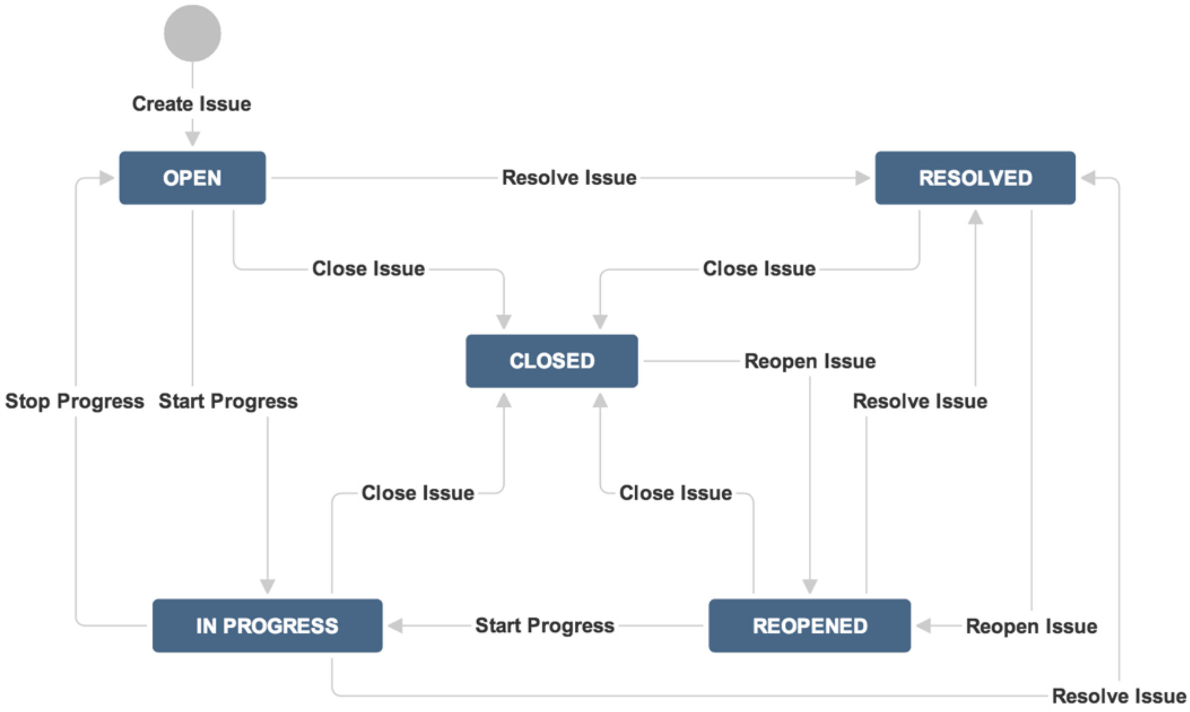


Nice work! Want to learn more? Proceed to the JIRA Service Desk documentation home linked below.

Service desk docs »

What is Workflow

A JIRA workflow is the set of *statuses* and *transitions* that an issue goes through during its lifecycle. The following diagram shows JIRA's built-in workflow:



JIRA's system workflow can be customized by your JIRA administrator.

How JIRA and JIRA Service Desk Work Together

Each service desk you create with JIRA Service Desk is based on a JIRA project. If you have multiple teams within your business that respond to different types of requests, you'll likely want to manage these in separate projects (for example, an IT project, an office & supplies project, etc.). Each service desk can be designed to meet the specific needs for both the service desk team who manages the requests and the customers who make them.

For information on setting up JIRA users to use JIRA Service Desk, see Setting up service desk users.

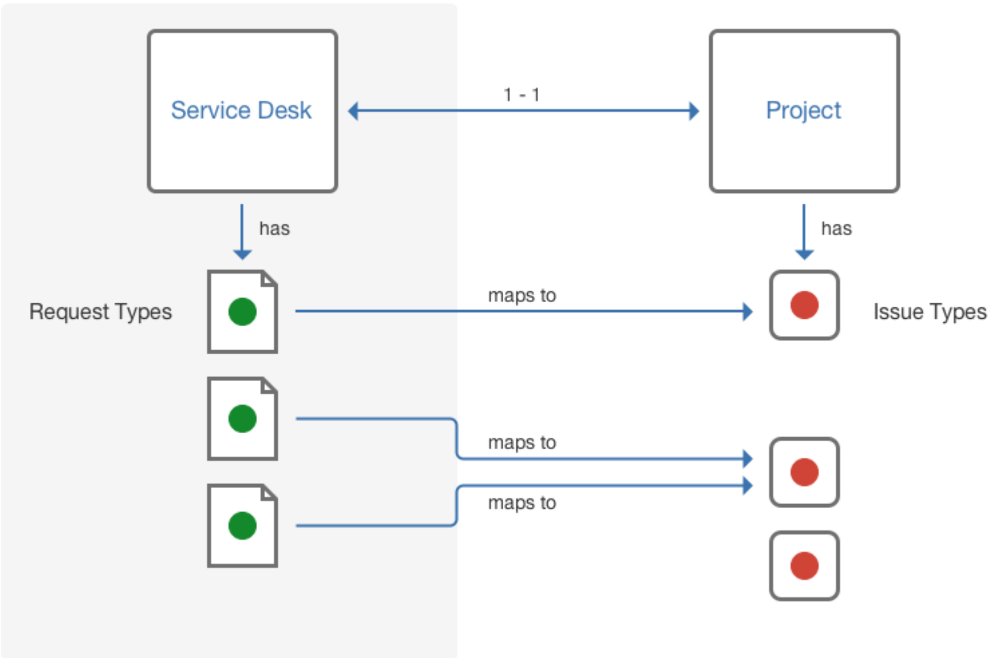
When you set up a service desk, you can either:

- **Create a new service desk project** - This option is ideal if you have new internal processes that need to be managed through a central tool. JIRA Service Desk will create all the basic components of the service desk: a template Customer Portal, generic SLAs, and basic reports. JIRA Service Desk also provides the underlying JIRA features optimized for IT service desk requests: a workflow, fields, and issue types. All you need to do is customize them to meet your needs!
- **Create a service desk for an existing JIRA project** - This option is ideal if you've already been using JIRA in a help desk capacity (for example, to fill IT requests, etc.). When you create a service desk for an existing project, JIRA Service Desk uses the workflow, fields, permissions, and issue types you already have set up on the project as a basis for the flow of requests in the service desk.

A look at how JIRA projects work in JIRA Service Desk

JIRA Service Desk lets you put the power of JIRA into the hands of your support agents (for example, by allowing them to move requests through complex workflows). However, the Customer Portal lets you present a simpler experience to your customers. In other words, customer portals let you map the components of JIRA to the information your customers will see and understand.

Each JIRA Service Desk project is based on a JIRA project. The request types within a service desk are based on JIRA issue types.



You use the Customer Portal screen to map request types to issue types and to customize how request types appear for customers. You also use this screen to add new request types or remove ones you don't need. For more information on designing a Customer Portal, see Designing Customer Portal.

The workflows and fields associated with an issue type can also be customized on the Customer Portal. See Setting up request types for more information.

How JIRA Service Desk Collects Analytics

JIRA Service Desk tracks user events for the purposes of usage analytics so that we can improve the product.

How to change data collection settings?

If you use JIRA Service Desk Server (you install it from Atlassian Marketplace), you can opt in or out for data collection. You can change your data collection settings at any time by going to  **> System > Advanced > Analytics**.

If you use JIRA Service Desk Cloud, you will not be presented with an opt-in prompt. This is because data collection in Atlassian Cloud is already permitted and described in our Privacy Policy and End User Agreement and cannot be disabled.

What do we collect?

All the data we collect is subject to the terms of our Privacy Policy and our End User Agreement.

JIRA Service Desk collects information regarding the type and frequency of feature usage within the product. We use these usage metrics to better understand how you use our product so that we can improve the product in future releases.

How is data collected?

For all customers we use the Atlassian Analytics plugin to collect and analyze the data.

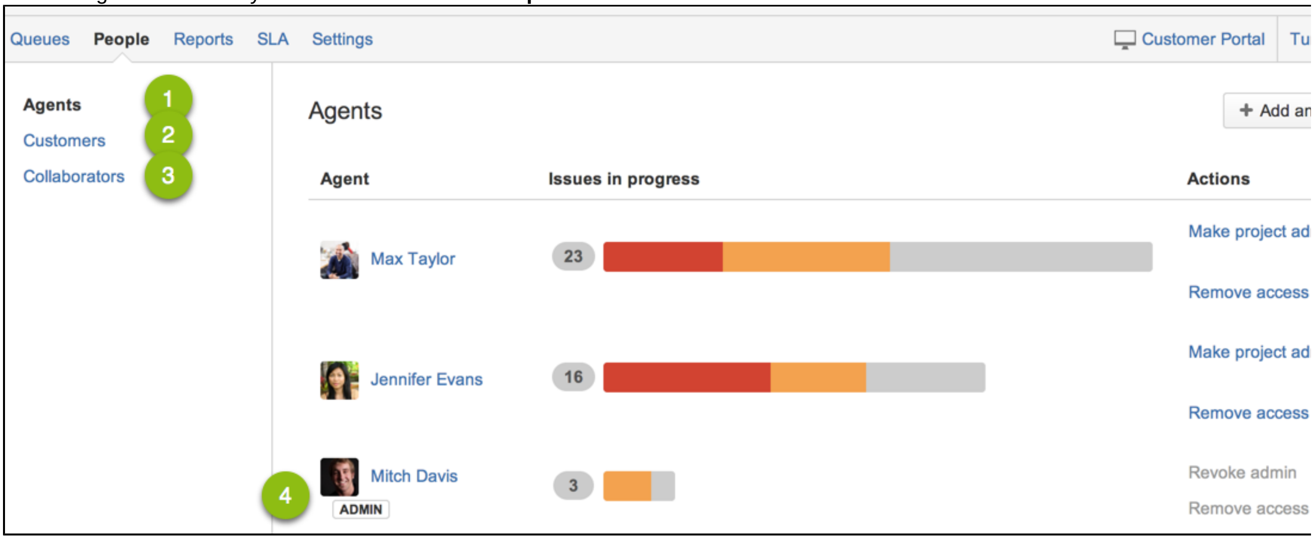
Setting up service desk users

With the JIRA Service Desk standard permission scheme and project roles in place, adding users to a JIRA Service Deskproject just involves creating the users and assigning them to the project role you want them to have.

On this page

The People tab

You manage the users for your service desk on the **People** tab.



Types of JIRA Service Desk users and the issue view for them

1. **Agents** use the service desk interface in JIRA to view their queues, reports generated by the service desk administrator, and the SLA metrics they're working against. When agents work on a customer request, they update and log information on the request using the standard JIRA issue view. This gives them access to all the JIRA features for managing issues. For details, see Agent - JIRA Service Desk.

2. **Customers** log requests through your Customer Portal. They don't see the service desk tools used by your team. As their request is being worked on, they receive emails on the status changes and public comments made by the agent. They can also use the Customer Portal to see a list of all their requests (current or completed). For details, see Customer.

3. **Collaborators** are the users that occasionally help your team resolve requests by making internal comments. For example, developers help support staff analyze a bug and add a comment that explains the cause and any workaround available. Collaborators don't have access to the service desk interface (e.g. queues, reports and SLAs) and service desk projects appear as JIRA projects to them. They cannot work on issues, for example, logging work or transitioning issues. For details, see Collaborator.

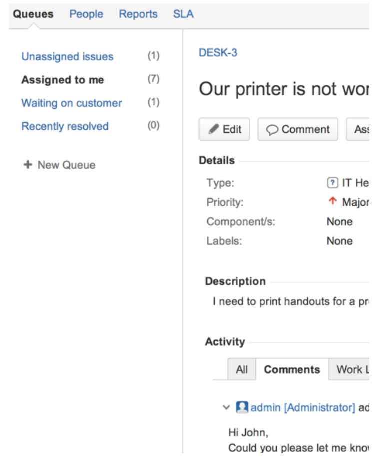
4. **Service desk administrators** use the service desk interface in JIRA to customize and manage a service desk for a given project. Administrators are users with administrative rights for a service desk and the underlying JIRA project. For the details about what they can do, see Administrator.

Note

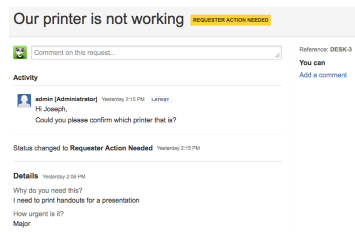
This page applies to **the version 2 license**.

All purchases of JIRA Service Desk made on and after 10 September 2014 are on the version 2 license, i.e. the new pricing model. For instructions on user management for version 1 license, see Setting up users with the version 1.x pricing.

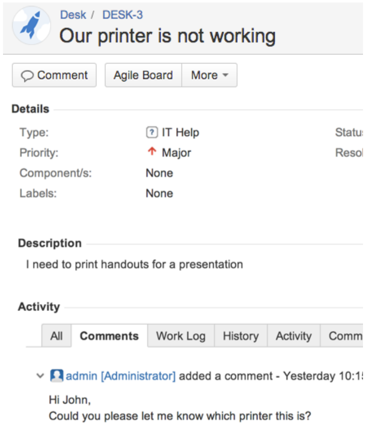
Agents see the issue in the service desk



Customers see the Customer Portal



Collaborators see the JIRA issue view



Setting up users

Use the following information to manage different types of users.

Users, groups and project roles

Users, groups and project roles are what you use the most when managing users and their permissions.

Managing agents

Agents are users that work on customer requests and communicate with customers. An agent consumes one JIRA Service Desk license and one JIRA license.

Managing customers

JIRA Service Desk customers are users who create requests for the service team to work on. They do not have access to the service desk interface in JIRA used by agents. Customers do not consume JIRA Service Desk licenses or JIRA user licenses.

Managing collaborators

Collaborators are JIRA users that occasionally assist agents with customer requests, e.g. developers who help support staff analyze bugs. A collaborator consumes one JIRA user license.

Configuring public signup

You can enable public signup for your service desk so customers can create an account on the Customer Portal. Agents will also be able to send new customers invitations to create an account. If you want new customers to be able to create requests by sending emails to your service desk, you must enable public signup.

Troubleshooting issues with user management

This page contains information about the errors and problems that you might have when managing users in your service desk.

Setting up users with the version 1.x pricing

Users, groups and project roles

Users, groups and project roles are what you use the most when managing users and their permissions.

JIRA Service Desk project roles

JIRA Service Desk automatically assigns the permissions to users for the project role they are in.

The **Administrators** role is a JIRA default role. When you appoint a user as the administrator of a service desk on the **People** tab, the user is automatically added to this role.

JIRA Service Desk adds the following roles to service desk projects.

- **Service Desk Customers:** This role contains the customers of a service desk.
- **Service Desk Team:** This role contains the agents on a service desk.
- **Service Desk Collaborators:** This role contains the collaborators on a service desk.

By default, the user who creates a service desk project is in the **Service Desk Team** and **Administrators** role. If the **Allow unassigned issues** JIRA option is disabled, the creator will also be added to the **Developers** role.

- For information about the JIRA option, see Configuring JIRA Options.
- For information about the **Developers** role, see Managing Project Roles.
- For information about how the permissions are set up for the roles in service desk projects, see JIRA Service Desk permissions.

The service-desk-agents group and JIRA Service Desk license

In addition to the default groups in JIRA, JIRA Service Desk adds the **service-desk-agents** group to the system and uses this group to manage license allocation.

All users in this group count towards the JIRA Service Desk license seats.

- Agents are added to this group automatically when you create user accounts for them.
- They are removed from this group when you revoke their agent license.

To understand how the group is associated with the license technically, see JIRA Service Desk licensing.

Managing agents

Agents are users that work on customer requests and communicate with customers. An agent consumes one JIRA Service Desk license and one JIRA license.Before agents can work on customer requests in a service desk, they must have access to the service desk. This means that agents must be assigned to the service desk by an administrator.

On this page:

Create a new agent account

You must be a JIRA administrator, that is you have the **JIRA Administrators** or **JIRA System Administrators** global permission.

To create a user account, you have the following options:

- In the header, go to **Service Desk** > **Manage agents**. Click the **New agent** button to create a user account and select which service desks the new agent needs to access.
  Keyboard shortcut: **'g' + 'g' +** start typing **'service desk agents'**
- In one of your service desk projects, go to **People** > **Agents**. Click the **Add an agent** button to create a user account. The user will be automatically assigned to the service desk project.

New agents will then receive an email that contains a link to to set their password.

New user accounts for agents are added to the **service-desk-agents** group and **jira-users** group. When assigned to a service desk project as agents, users are added as members of the **Service Desk Team** role. For information about the group and the role, see Users , groups and project roles.

Grant a JIRA Service Desk license to an existing user

You must be a JIRA administrator, that is you have the **JIRA Administrators** or **JIRA System Administrators** global permission.

1. In the header, go to **Service Desk** > **Manage Agents**.
   Keyboard shortcut: **'g' + 'g' +** start typing **'service desk agents'**
2. Click **Make user an agent**. Follow the prompts to grant a service desk license seat to a user.

Assign an agent to a service desk project

Project administrators, i.e. service desk administrators, can assign agents to their individual service desks as needed.

You can do this in one of the following ways:

- In a service desk project, go to **People** > **Agents**.
  - To assign an agent to the service desk, select **Add an agent** \.
- If you are a JIRA administrator or system administrator: In the header, go to **Service Desk** > **Manage agents**. Find the agent in the allocated agent list and select **Assign service desks**.
  Keyboard shortcut: **'g' + 'g' +** start typing **'service desk agents'**

To remove an agent from your service desk project, go to **People** > **Agents**, find the agent in the agent list, and select **Remove access**.

Revoke agent access to free up an agent license seat

You must be a JIRA administrator, that is you have the **JIRA Administrators** or **JIRA System Administrators** global permission.

1. In the header, go to **Service Desk** > **Manage Agents**.
2. Locate the agent, and click the **Revoke agent access** button.

Agents who have been revoked the agent license will become a collaborator on the service desks they have access to.

> **Note**
> This page applies to **the version 2 license**.
>
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Managing customers

JIRA Service Desk customers are users who create requests for the service team to work on. They do not have access to the service desk interface in JIRA used by agents. Customers do not consume JIRA Service Desk licenses or JIRA user licenses. Customers can:

- Create and track their own requests
- Add comments to their own requests
- Add other participants to their own requests

Every customer must have an account to create requests. They need to log in to use the Customer Portal. When customers contact your service desk with the email channel for the first time, new user accounts will automatically be created for them if public signup is enabled. If the service desk does not allow public signup, emails sent by unregistered email addresses will not be processed.

On this page

Related pages

- Managing agents
- Managing collaborators
- Configuring public signup

> **Note**
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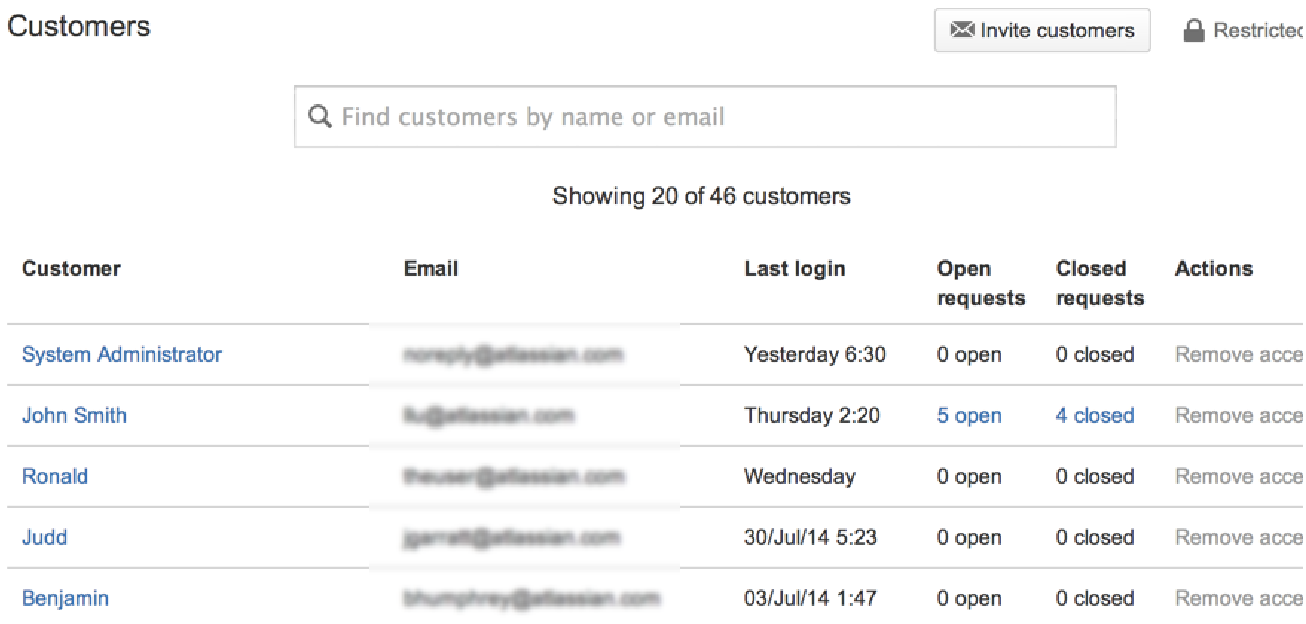
>
> All purchases of JIRA Service Desk made on and after 10 September 2014 are on the version 2 license, i.e. the new pricing model. For instructions on user management for version 1 license, see Setting up users with the version 1.x pricing.

Managing customers and their requests

You can find customers and the requests they created in your service desk by using the **Customers** section of the **People** tab. We refer to this section as the *customer list*. The list shows twenty customers at most. You can search for customers that do not appear on the list.

To look at requests created by a customer, use the **Open requests** and **Closed requests** columns on the list.

Screenshot: Customer list on the People tab



Adding customers

There are a number of ways to add customers to your service desk.

Allowing customers to sign up for user accounts

Public signup allows your customers to create accounts on the Customer Portal or by emailing into your service desk project. As new customers sign up, they will be added to your service desk's customer list.

To enable public signup, see Configuring public signup.

Adding customers to your service desk manually

To add customers manually:

1. In your service desk, go to the **People** tab > **Customers**.
2. Select the **Invite customers** button, and enter the email addresses of the customers.
   Note: Mailing lists do not work.

Invited customers will then receive an email invitation that links them to your Customer Portal. They can log in to your portal if their email already exists in the system, or they will need to fill in details for their account and set the password after landing on the portal.

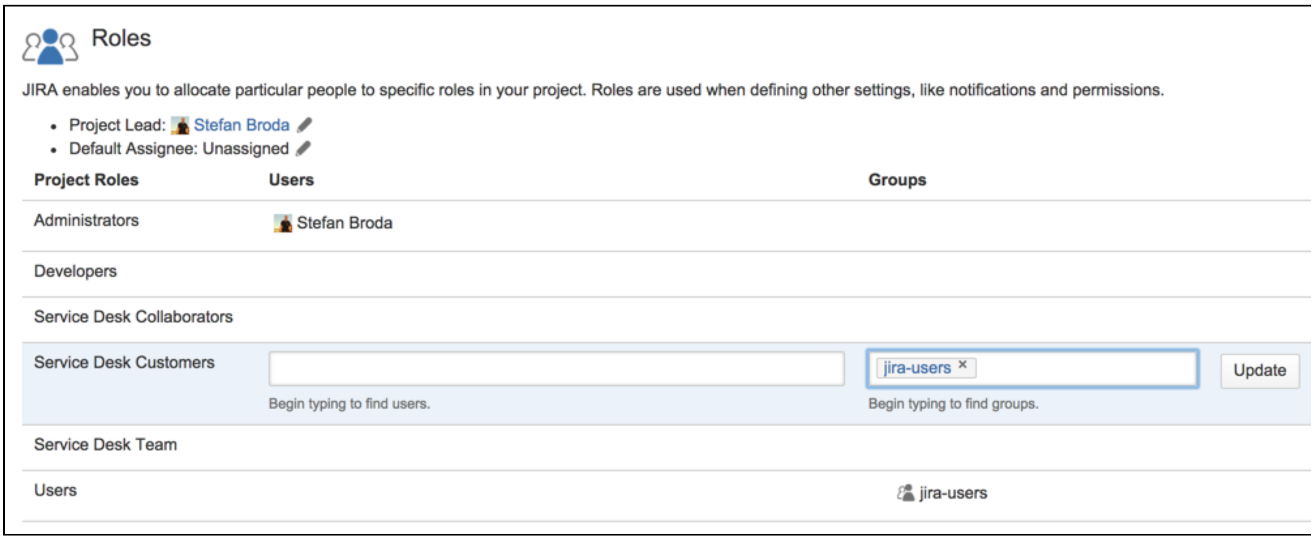
Customers are added as members of the **Service Desk Customers** role automatically after you invite them to your service desk.

Adding customers to your service desk by groups with the project role

You can add groups of customers by adding them to the **Service Desk Customers** project role.

1. Open the service desk in the administration console, go to **Administration** > **Projects**.
2. Choose your service desk.
3. Open the **Roles** section
4. Review the **Service Desk Customers** role and update the **Groups** field. Enter one or multiple JIRA user groups of your choice and click **Update**.

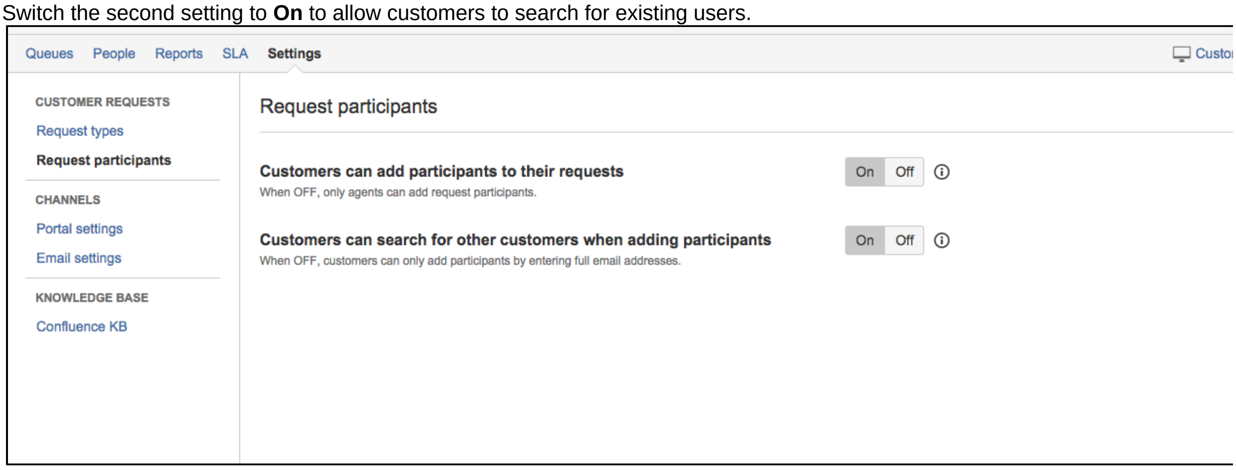
The users in the groups you added will then have access to your service desk.



Enabling request participants

You can allow your customers to add other participants to requests via the Customer Portal. You can also allow customers to search for existing service desk users by name or email address.

1. In your service desk, go to the **Settings** tab > **Request participants**.
2. Switch the first setting to **On** to allow customers to add request participants.
3. Switch the second setting to **On** to allow customers to search for existing users.



Note that enabling these settings does not bypass JIRA issue-level security. If issue-level security (e.g. restricting an issue to only be viewable by the reporter) has been applied, participants may not be able to access their requests. For more information, see Configuring Issue-level Security.

Managing collaborators

Collaborators are JIRA users that occasionally assist agents with customer requests, e.g. developers who help support staff analyze bugs. A collaborator consumes one JIRA user license.Collaborators can:

- View issues, comments and attachments
- Add attachments and delete their own attachments
- Add internal comments to issues and delete their own comments

Best practices

Collaborators should create issues in their own project (outside of the service desk project) to track internal or long running work. This allows the team of collaborators to assign and log work on issues and use their own workflow for resolving their own issues. For example, when a support team runs into an application bug, this bug should be created as an issue in the development team's project. The development team can then use tools like JIRA Agile to allocate the bug into a sprint and see it through to an update in the application. Separating customer issues with internal ones also allows the support team to link multiple support tickets to the single underlying bug, avoiding duplication for the development team.

On this page

Related pages

- Managing agents
- Managing customers

Examples of agents and collaborators working together on requests

Application support example

Diane, an application support team member (*agent*), loops in Tony, a developer (*collaborator*) using @mention to ask him for advice on an exception in a log file. Tony takes a look at the issue in JIRA, views the attached log file and posts an internal comment for Diane with his analysis. After that, Diane, as the assigned agent, conveys the findings to the customer to resolve the issue.

IT service desk example

Martin, an IT service desk team member (*agent*), links an incident ticket with an underlying network problem ticket for the network ops team in a regular JIRA project. Andrew, a network ops team member, assigns this network issue to himself and starts working on it. After fixing the network problem, Andrew navigates to the linked incident in the IT service desk and leave an internal comment (*collaborator*) for Martin, asking Martin to try the network connection again. Seeing the comment, Martin verifies and tells the customer that the problem is resolved.

Adding a collaborator to a service desk

1. In the service desk, go to the **People** tab > **Collaborators** section. Click **Add collaborator**.
2. Follow the prompts, search for the user you want to add and then add the user to your service desk.
   If you cannot find the user from the search, it means that the user does not have a user account in the system. You can only add existing JIRA users as collaborators. You can create the user in JIRA. Note that you must be a JIRA administrator to create users.

Configuring public signup

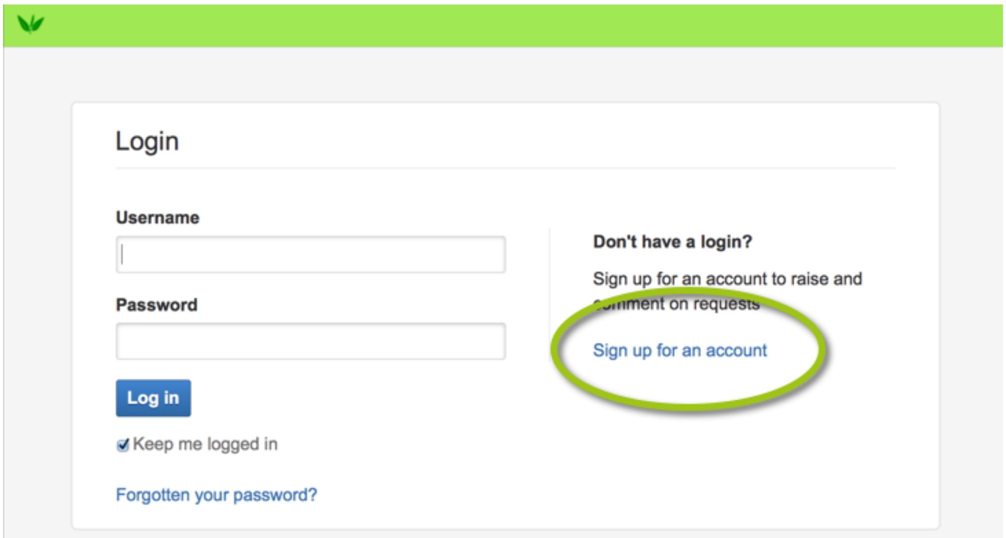
You can enable public signup for your service desk so customers can create an account on the Customer Portal. Agents will also be able to send new customers invitations to create an account. If you want new customers to be able to create requests by sending emails to your service desk, you must enable public signup.

On this page:

When customers send emails to your email channel from email addresses that do not exist as user accounts in the system, their email addresses are automatically added as new users when public signup is enabled. If the service desk does not allow public signup, emails sent from new email addresses are not processed.

> **Note**
> This page applies to **the version 2 license**.
>
> All purchases of JIRA Service Desk made on and after 10 September 2014 are on the version 2 license, i.e. the new pricing model. For instructions on user management for version 1 license, see Setting up users with the version 1.x pricing.

Screenshot: The signup option on a Customer Portal



Opening your service desk up for public signup

Configuring a service desk to allow public signup is a two-step process:

1. Enable public signup for JIRA Service Desk. This step is is at the system level and when the setting is enabled, service desk administrators can set their individual service desks to allow signup. If the setting is disabled, service desk administrators do not see the signup option on their service desks.
   To do this:
   a. Log in as a user with the **'JIRA Administrators'** global permission.
   b. Choose  > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Configuration**.

      Keyboard shortcut: **'g' + 'g' +** start typing **'service desk'**
   c. In the **Public signup** section, enable the setting.
2. Enable signup for your service desk project. This step is at the service desk level and service desk administrators can perform this action.
   To do this:
   a. Go to **People** > **Customers**.
   b. On the right-hand side of the page, select **Restricted access**.
   c. Select **Everyone with an account can access my Customer Portal** and **Anyone can sign up for a customer account on my Customer Portal**.

Once you've enabled public signup for your service desk, you can your agents can use the **Invite Customers** button to invite new customers to signup for an account on your Customer Portal. You can also email customers the link directly or post the link on your intranet. Once your customers create an account, they will be able to create requests straightaway.

If you already set up the email channel for your service desk, a new customer can just create requests by emailing your service desk and an account will be created for them automatically.

New user accounts are added to the **Service Desk Customers** role for the service desk and appear in your customer list on the **Custom ers** section of the **People** tab. Customers will receive email notifications about their user accounts.

Turning off public signup

Turning off public signup does not affect the existing customers who've created their accounts via signup.

If you turn off the public signup setting for all the service desks at the system level, all service desks that allow signup will be disabled automatically.

Enabling CAPTCHA

CAPTCHA for JIRA Service Desk is controlled through the JIRA CAPTCHA setting. If the JIRA CAPTCHA setting is enabled in JIRA, customers will need to enter the word that is displayed in a picture in a text field when signing up for an account. CAPTCHA helps preventing signup by spam systems. Follow the instructions on the Enabling Public Signup and CAPTCHA page to enable CAPTCHA.

FAQs

Does public signup count towards the license?

As with any customer account, user accounts that are created via public signup for JIRA Service Desk do not count towards your license. For information about how licensing works, see JIRA Service Desk licensing.

JIRA Service Desk public signup v.s. JIRA public signup

The two signup settings (the JIRA **mode** setting and the public signup in JIRA Service Desk) work independently. For example, if the JIRA mode is set to private and public signup is enabled for JIRA Service Desk, users cannot sign up for accounts to access JIRA, but they can sign up for accounts to access the Customer Portal of JIRA Service Desk. For more information about JIRA public signup, see Enabling Public Signup and CAPTCHA.

Troubleshooting issues with user management

This page contains information about the errors and problems that you might have when managing users in your service desk.

Related pages

- JIRA Service Desk licensing
- Users, groups and project roles

Cannot add agents, make users agents or revoke agent access because of read-only user directories

Click here to expand...

All of these actions are changing the JIRA Service Desk agent license allocation and therefore involve modifying the membership of the *service-desk-agents* group. Adding agents and making JIRA users an agent add users to the group; revoking agent access removes users from the group. When user directories are read only, JIRA Service Desk cannot modify the group and therefore you cannot perform these actions.

To resolve it:

JIRA administrators can solve this problem by modifying the configuration of user directories. For more information, see Configuring User Directories.

Cannot add new agents or make users agents because JIRA Service Desk cannot add users to the *service-desk-agents* group.

Click here to expand...

These actions allocate the JIRA Service Desk agent license to users and need to add users to the *service-desk-agents* group. This message appears when a group named *service-desk-agents* already exists before JIRA Service Desk is installed. Because modifying existing groups that are not created by JIRA Service Desk can have negative impacts on your system, JIRA Service Desk cannot proceed to finish the actions.

To resolve it:

Delete the existing group. JIRA Service Desk will then automatically create the *service-desk-agents* group.

JIRA Service Desk creates the group when you navigate to any of the following pages: the **Service Desk Agents** pag e and the **Agents** section on the **People** tab of a service desk.

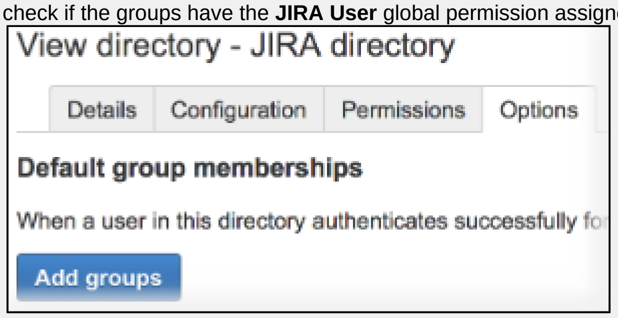
Customers count towards JIRA license seats when using Atlassian Crowd

Click here to expand...

This is usually caused by customers being a member of a group that has the **JIRA Users** global permission.

To resolve it:

1. Remove the customers from groups that have the permission.
2. If you have set default groups for new users to be added to in Crowd for the directory connected to JIRA, check if the groups have the **JIRA User** global permission assigned. If they do, you have two options:



   - Disable the default membership setting by removing the groups from the default group list. This means that your JIRA users (i.e. those that count towards your license) are not added to any group be default either when created.
   - If you want JIRA users, JIRA Service Desk customers, or both to be added to default groups, you can do so by using separate directories for each type of user. Make sure that the default groups for JIRA Service Desk customers do not have the **JIRA Users** global permission.

Setting up users with the version 1.x pricing

With the JIRA Service Desk standard permission scheme and project roles in place, adding users to a JIRA Service Desk project just involves creating the users in JIRA and assigning them to the project role you want them to have.

On this page

This page applies to the version 1.x pricing
All purchases made on and after 10 September 2014 are on the version 2.x pricing. For instructions on user management for version 2.x pricing, see:

- Managing agents
- Managing customers
- Managing collaborators

Types of JIRA Service Desk users

There are three main ways users interact with JIRA Service Desk:

- **Service desk administrators** use the service desk interface in JIRA to customize and manage a service desk for a given project. Administrators are users with administrative rights for a service desk and the underlying JIRA project. For the details about what they can do, see Administrator.
- **Service team members** use the service desk interface in JIRA to view their queues, reports generated by the service desk administrator, and the SLA metrics they're working against. When service desk team members work on a customer request, they update and log information on the request using the standard JIRA issue view. This gives them access to all the JIRA features for managing issues.
- **Customers log requests either through your Customer Portal or by sending emails.** They aren't required to see the service desk tools used by the service desk managers or team members. As their request is being worked on, they receive emails on the status changes and public comments made by the service desk team. They can also use the Customer Portal to see a list of all their requests (current or completed). For details about notifications, see Configuring JIRA Service Desk notifications.

Setting up users

To do this:

1. Create the users in JIRA.
2. In your service desk, go to the **People** tab, and assign a project role to your users or make sure that the groups which they belong to are associated with the project role.
Screenshot: Setting up project roles for your service desk

Project Roles	Customer Portal	Service Desk in JIRA	Administer Project	Users	Gro
Administrators	✔	✔	✔	admin [Administrator]	
Service Desk Team	✔	✔	✘		
Service Desk Customers	✔	✘	✘		

In order for customers to submit requests through the Customer Portal, they must log in with their JIRA credentials (either through JIRA or the Customer Portal). Customers can also update their name, email address, password, timezone, and avatar from the Customer Portal. This information will be updated in the JIRA user directory automatically.

Note: Updating avatars does not work in Internet Explorer 8.

JIRA Service Desk project roles and permissions

Based on the three types of users, JIRA Service Desk creates two additional default JIRA project roles, Service Desk Team and Service Desk Customers. These two roles mirror the way service team members and customers interact with JIRA Service Desk, and the Administrators role mirrors that of the service desk administrators.

JIRA Service Desk also provides a standard permission scheme (JIRA Service Desk Permission scheme for [project]) that automatically gives your JIRA Service Desk users the correct permissions for the project role you assign them. For example, giving users the Service Desk Team role will allow them read-only access to JIRA Service Desk, as well as allow them to work on issues in JIRA.

Note:

Version 2.0 introduces the **service-desk-agents** group and the **JIRA Service Desk agent access** global permission in addition to the default ones in the system. JIRA Service Desk uses these two new settings to manage license allocation when the version 2 license is applied. Because you are using the version 1 license, it is recommended that you do not modify these two settings. This will also ensure easier migration when you want to change to the new pricing model later. For more information about the version 2 license, see JIRA Service Desk licensing.

Using custom permission schemes

The standard JIRA Service Desk permission scheme has pre-configured all the JIRA permissions to support the way most service desk teams are set up. If you choose not to use the standard permission scheme, make sure your users have the right JIRA permissions for their role in your service desk team as described in the following table.

You can switch back to the standard one at any time by using the migration option on the **Peopl e** tab.

New to JIRA permissions?
See Managing Project Permissions.

Users	Permissions
Service desk administrators	Because service desks are built upon JIRA projects, you must have JIRA project administration permissions in order to set up and administer a service desk. The project administration permission allows you to manage service desk functionality like creating new request types, setting up new queues, creating SLAs, and generating reports. As an administrator, you must also have all the permissions required for your service desk team members and customers in order to see all the functionality they'll be using.
Service desk team members	If you use a custom permission scheme, make sure your service desk agents have the right permissions for their role in the service desk team. The following JIRA permissions are recommended for service desk agents: • Create Issues (This permission gives users the ability to create issues in a Customer Portal) • Browse Projects (This permission gives users read-only access to the **Queues**, **Reports**, **SLA**, and **Customer Portal** tabs in JIRA, as well as access to the project's Customer Portal) • Schedule Issues • Add Comments • Create Attachment
Service desk customers	If you use a custom permission scheme, make sure your service desk customers have the right permissions. Using the **Service Desk Customer - Portal Access** security type is recommended. This allows you to give customers access to the Customer Portal only (not JIRA). These are the recommended JIRA permissions for service desk customers: • Create Issues (This permission gives users the ability to create issues in a Customer Portal) • Browse Projects (This permission gives users access to the project in the Customer Portal) • Add Comments (if you want customers to be able to add comments after they have submitted a request) • Create Attachments (if you want customers to be able to add an attachment when they create a request or add an attachment to the request after it's been submitted) • Assign Issue (if you want to use the **Assignee** field to automatically channel issues to certain team members) In addition, if the service desk project uses an issue security scheme, make sure that it is configured so that service desk users can view issues. Otherwise, customers might be able to create issues but not view them after they've been created.

Setting up service desks for your projects

Use the following information to set up JIRA Service Desk. Some of the settings can only be modified by JIRA administrators, for example changing notifications. Service desk administrators (i.e. project administrators) can modify the other project settings for their individual service desks.

Setting up request types

JIRA Service Desk provides a set of default request types that are configured for basic IT help desk scenarios. You can configure the default ones to suit your company's needs or add new ones.

Designing Customer Portal

JIRA Service Desk pre-configures a Customer Portal for each service desk you set up. The Customer Portal is where you design the request forms your customers will fill out.

Configuring JIRA Service Desk notifications

By default, when an issue is created through the Customer Portal for a JIRA Service Desk, JIRA Service Desk overwrites the project's JIRA notification scheme and suppresses emails that would be sent to the reporter by the notification scheme.

Opening up or restricting access to your service desk

Setting up the email channel

Your customers can open requests and communicate with your service team by working from their familiar email box when the email channel is enabled for your service desk.

Related pages

- Getting started with JIRA Service Desk

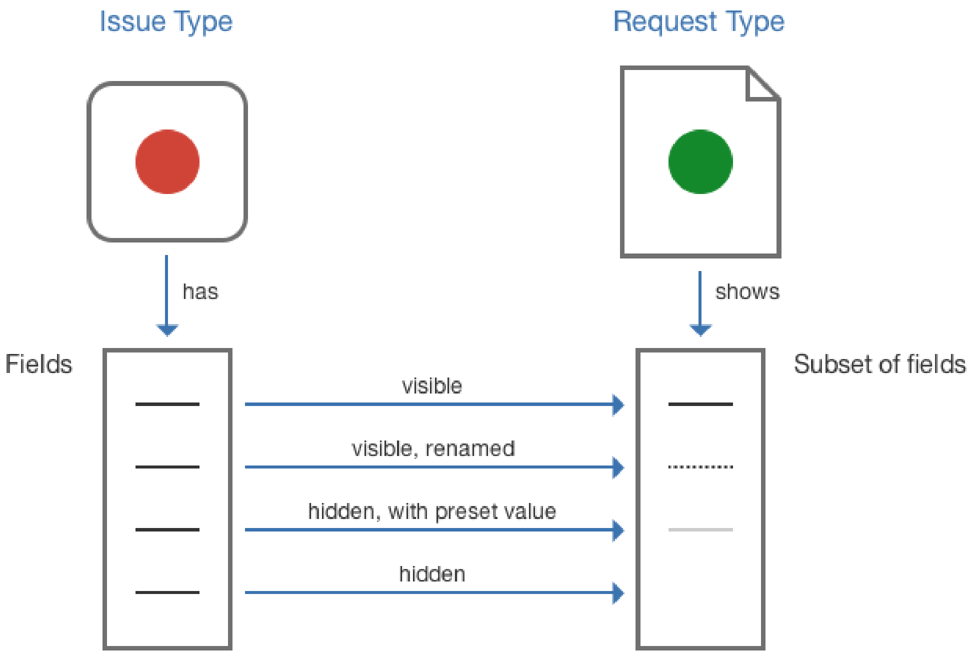
Setting up request types

JIRA Service Desk provides a set of default request types that are configured for basic IT help desk scenarios. You can configure the default ones to suit your company's needs or add new ones.

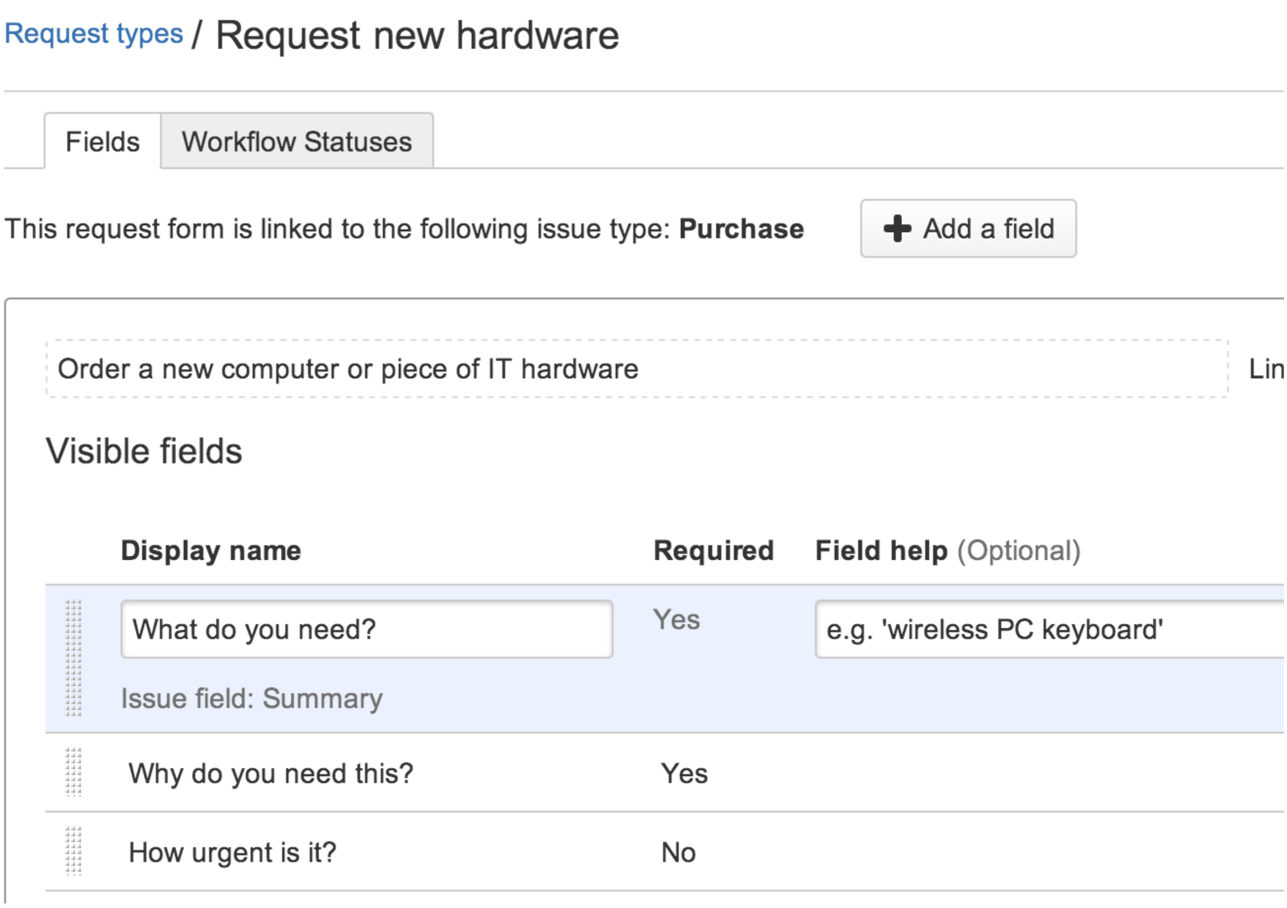
On this page

Customizing the fields on a request type

The fields and descriptions that appear in a request type are based on the field configured for the issue type (that is, the issue type the request type is based on).



You use the **Fields** tab to change the default JIRA field names to more customer friendly language. For example, the "Summary" field appears as "What do you need?" for customers.

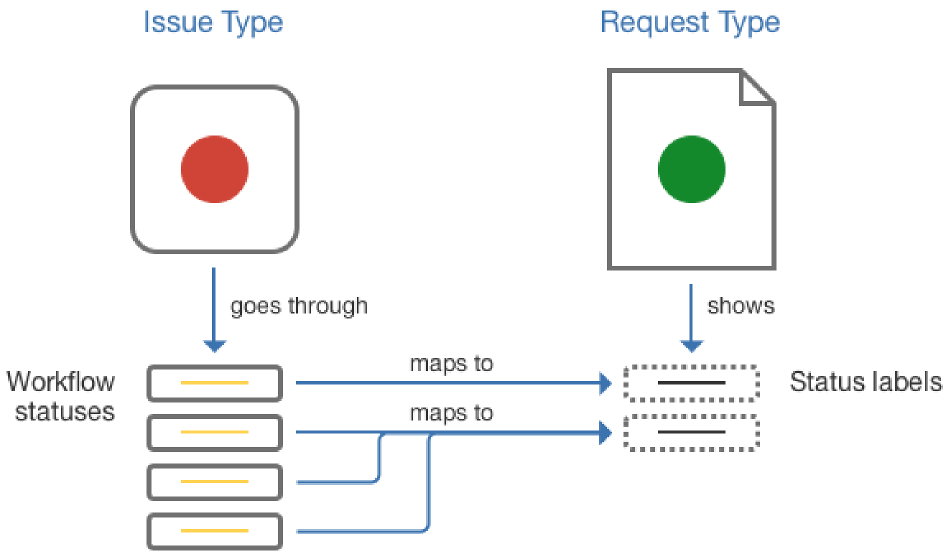


You can also keep fields hidden but available on the request type so that their value can be used for other processes. For more details about how different types of fields work in JIRA Service Desk, see Hidden fields and unsupported fields.

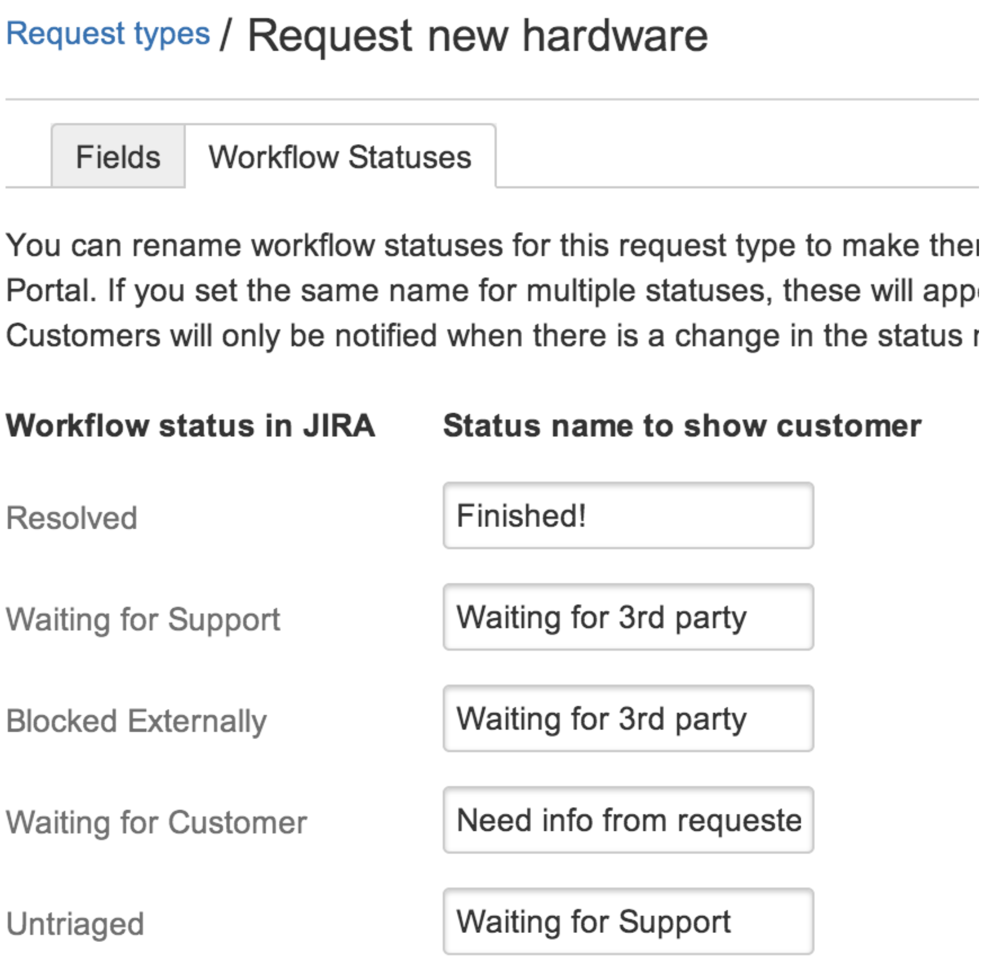
If the issue type doesn't have the fields you need, you must add a field to the JIRA issue type that the request type is based on. If the issue type uses multiple screen schemes, the new field must be available in the create screen. See Configuring Fields and Screens.

Customizing the workflow statuses for a request type

JIRA Service Desk uses the workflow associated with the request's issue type for the flow of the request.



You can re-map the default workflow statuses to more customer friendly statuses that will appear for customers, and you can also map multiple statuses to a single customer status to simplify the appearance of the workflow. Use the **Workflow Statuses** tab to customize the workflow that customers will see.


Request types / Request new hardware
Fields
Workflow Statuses
You can rename workflow statuses for this request type to make
Portal. If you set the same name for multiple statuses, these will
Customers will only be notified when there is a change in the status
Workflow status in JIRA
Status name to show customer
Resolved
Finished!
Waiting for Support
Waiting for 3rd party
Blocked Externally
Waiting for 3rd party
Waiting for Customer
Need info from requeste
Untriaged
Waiting for Support

Save Discard unsaved changes

Only changes between these customer-visible 'status names' will be reflected in the Customer Portal and its notifications (e.g. a transition between two workflow statuses can be hidden on the Portal by giving them the same 'status name'). For more information about notifications, see Configuring JIRA Service Desk notifications.

If you need to change the workflow of a request, you must edit the workflow associated with the service desk project. You can find this workflow on the project administration section of the service desk project.

Hidden fields and unsupported fields

Each request type in a service desk is based on a JIRA issue type. Every JIRA issue type has a set of allowed (and possibly required) fields associated with it. As you set up the request type, you can choose to include fields that are hidden on the Customer Portal but still provide a value to assist with your internal processes and reporting. For example, you might want to set the value of the "Label" field as "hardware" for the "Request new hardware" request type, and set the value as "software" for the "Request new software" request type.

Some fields used by an issue type are not supported for use in the Customer Portal; if you include these fields on a request type, they will automatically be added to the **Hidden fields with preset values** section and you'll be required to set a value for them.

Other fields aren't supported for use in JIRA Service Desk.

These fields can be added to the request type and given a preset value, but you cannot make them visible on the Customer Portal:

- Assignee
- Linked issues
- Any fields that are defined by other add-ons in JIRA

These types of fields can't be added to a request type and won't appear in the in the "Add a field" dialog:

- Issue type
- Log work
- Reporter
- Security level
- Time tracking

Troubleshooting issues with request types

This page contains information about the errors and problems that you might have when setting up request types for your service desk.

Related pages

- Setting up request types
- Troubleshooting issues with the email channel
- Setting up the email channel

Cannot delete the request type because it is the default request type for the email channel

Click here to expand...

If you see this error when trying to delete a request type, it means that the email channel for your service desk uses this request type as the default one for all the requests coming from emails. When JIRA Service Desk pulls emails from the associated email account and creates requests, this request type is assigned to the requests automatically.

To resolve it:

JIRA administrators can change the default request type for email requests to be another one by going to **Settings** > **Email settings** in your service desk. For more information about the email channel setup, see Setting up the email channel.

Cannot show a hidden field or make an optional field required because the request type is the default for the email channel

Click here to expand...

When JIRA Service Desk creates new requests from emails sent to the email account associated with your service desk, it copies the email subject to the **Summary** field and the email content to the **Description** field. When more fields are required, JIRA Service Desk cannot parse emails to fill them in with correct values.

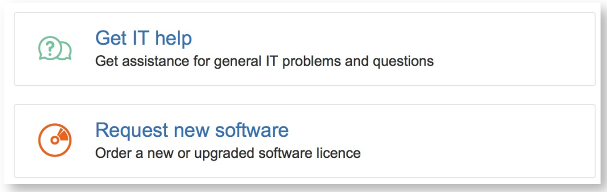
To resolve it:

You have the following options.

- If you want to show a hidden field, make it an optional one.
- Ask your JIRA administrator to change the default request type for the email channel to use a different request type, and then modify your request type to include more required fields. You can also create a new request type for the email channel if no existing types are suitable. For more information about the email channel setup, see Setting up the email channel.

Designing Customer Portal

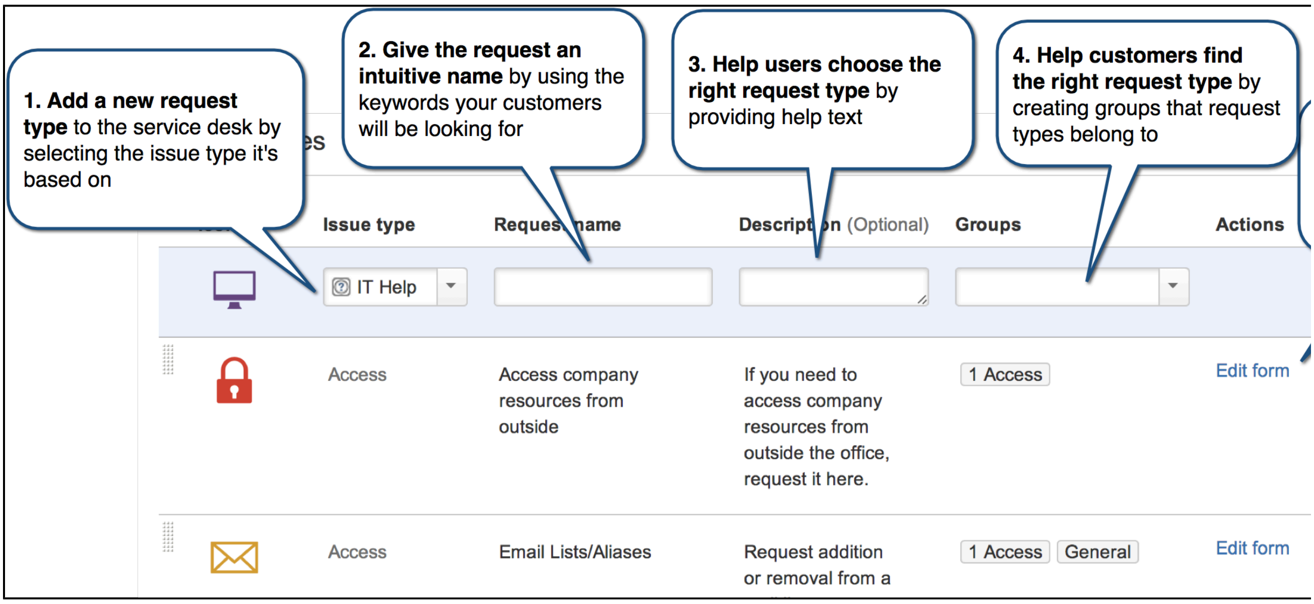
JIRA Service Desk pre-configures a Customer Portal for each service desk you set up. The Customer Portal is where you design the request forms your customers will fill out. As the service desk manager, you can map the JIRA features that are used to manage each request to the user friendly language your customers will see.



Tip: You can click the **Customer Portal** link at any time to see how your changes will appear for customers.

Setting up a new Customer Portal

The first step in setting up a Customer Portal is configuring the request types the service desk will support. Each request type in a service desk is based on a JIRA issue type. (See How JIRA and JIRA Service Desk Work Together for more information on how JIRA Service Desk works with JIRA.)



Note that a single JIRA issue type can be the basis for many different request types (for example, the "Purchase" issue type serves as the basis for both the "Request new hardware" and "Request new software" requests).

Accessing multiple Customer Portals and requests raised in multiple service desks

If you have multiple service desk projects running, your customers only need to remember one URL and they can see the list of all the Customer Portals they have access to in one place.

The URL to the list of portals is:

```
http://<computer_name_or_IP_address>:<HTTP_port_number>/jira/servicedesk/customer/portals
```

Next steps

- Branding your Customer Portal

- Organizing your Customer Portal

Branding your Customer Portal

Give your Customer Portal that familiar look by using your company's color scheme and logo. This is very easy to achieve: the color scheme for your service desk will automatically match that of your logo once your logo is uploaded.

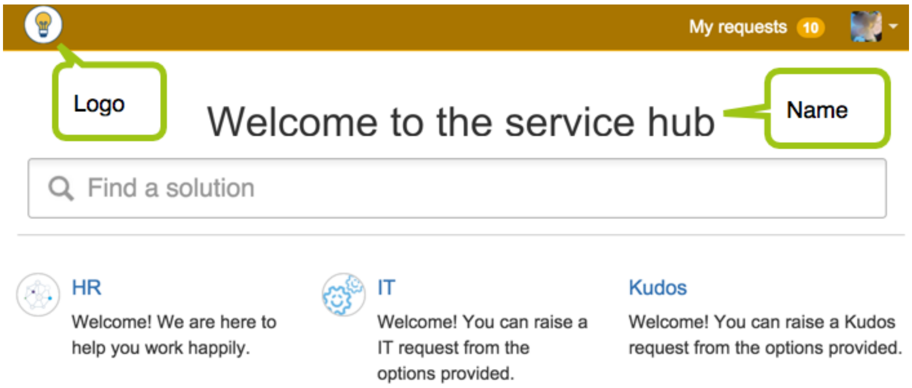
By default, the header of the Customer Portal displays **Help Center**. You can customize it by giving it your own name.

Related pages

- Organizing your Customer Portal
- Setting up request types

Choose ⚙ > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Configuration**.

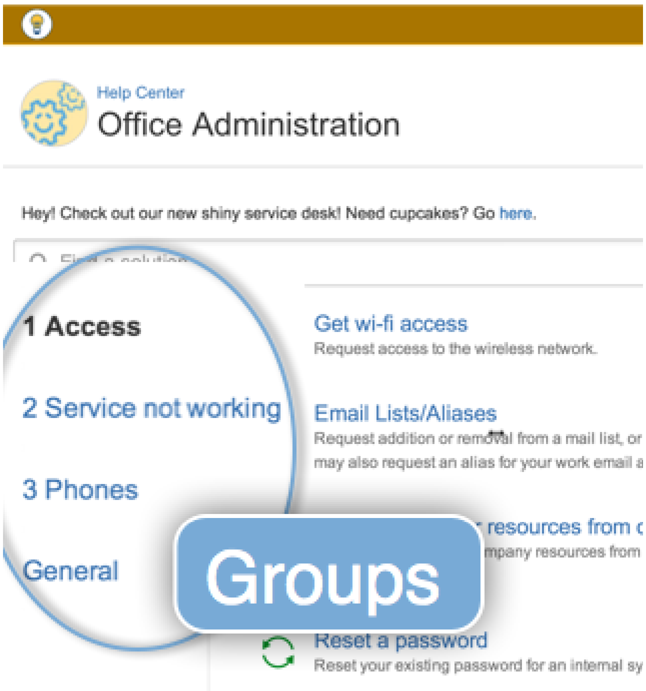
Keyboard shortcut: **'g' + 'g' +** start typing **'service desk'**



Organizing your Customer Portal

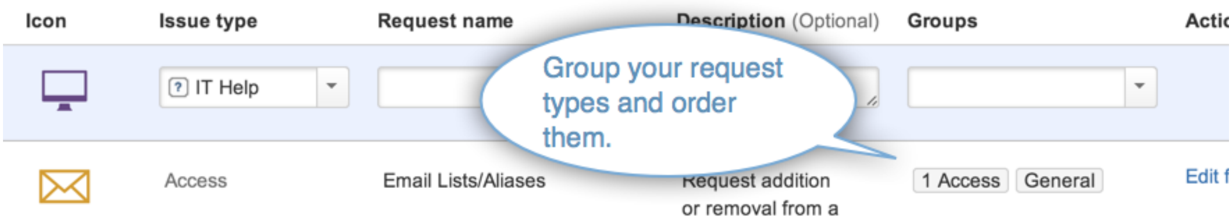
If you have several request types, you can use groups to organize the Customer Portal. We think groups are helpful if you have seven or more request types. Groups let you specify one or more category names to each request type. Then, JIRA Service Desk will automatically sort your request types into tabs in the Customer Portal, making it easier for customers to find exactly the type of request they need.

You must have more than one group for the groups to appear in the Customer Portal. Groups are unique to each service desk; if you want to use the same groups in all your service desks, the service desk administrator must manually create the same groups.



To add request types to one or more groups:

1. On the **Request types** page in the **Settings** tab, use the **Groups** drop-down and type the group names.



Tips

- Drag and drop request types to re-arrange them on your Customer Portal.

- Groups are displayed in the alphabetical order. To display them in a certain order, just prefix group names with numbers, e.g. *1 Access, 2 Service not working*.
- If you assign multiple groups to a single request type, the request type will appear on multiple tabs.

Configuring JIRA Service Desk notifications

By default, when an issue is created through the Customer Portal for a JIRA Service Desk, JIRA Service Desk overwrites the project's JIRA notification scheme and suppresses emails that would be sent to the reporter by the notification scheme. In addition to configuring JIRA Service Desk's notification scheme, you can select either HTML or plain text as the default type for service desk email notifications.

On this page

Who receives service desk notifications

Your customers	Your team
Your customers, i.e. the reporters of issues, receive email notifications when the following events happen: • when they raise a request through the Customer Portal, • when their request is resolved, • when another user comments on their request, and • when there is a change in the request's status, i.e. the 'status name'. In this case, the issue reporter is also prevented from becoming an auto watcher on the issue to prevent duplicate notifications.	The project's JIRA notification scheme takes effect for all users on your service desk team.

Configuring notifications for a JIRA Service Desk project

Two settings impact how notifications work for a service desk project:

- The **Notifications** setting for JIRA Service Desk at the system level and it controls the JIRA Service Desk notifications for all service desks. This setting is enabled by default.
  To disable JIRA Service Desk email notifications:

  Choose > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Configuration**.

  Keyboard shortcut: **'g' + 'g' +** start typing **'service desk'**
- The **JIRA notification scheme** that is associated with the project.
  - If the **Notifications** setting for JIRA Service Desk is enabled, the JIRA notification scheme takes effect for the other users.
  - If the **Notifications** setting for JIRA Service Desk is disabled, the JIRA notification scheme works as defined for all events and users.

Setting the notification email type to HTML or plain text

As a JIRA admin, you can set the default email type for service desk notifications to HTML or plain text. If your customers rely on software that requires plain text or use a plain text mail client, you can change your default setting to plain text and apply this change to new and existing customers.

1. Choose > **System**. Scroll down to the **User Interface** section and choose **Default User Preferences**.
   Keyboard shortcut: **'gg'** + start typing **'default user preferences'**
2. Select **Edit default values**.
3. Change the **Default outgoing email format** to html or text and click **Update**.
   At this point, the email format you have selected will only be applied to new service desk customers. If you also want to override the email format chosen by existing service desk customers and agents:
4. Under **Operations**, select **Apply**.
5. Select **Update** to finish applying the email preference to all user accounts.

Notes on service desk notifications

Only changes between the customer-visible 'status names' will trigger email notifications (e.g. a transition between two workflow statuses can be hidden on the Portal by giving them the same 'status name'). For more information about workflows, see Setting up request types
.

Opening up or restricting access to your service desk

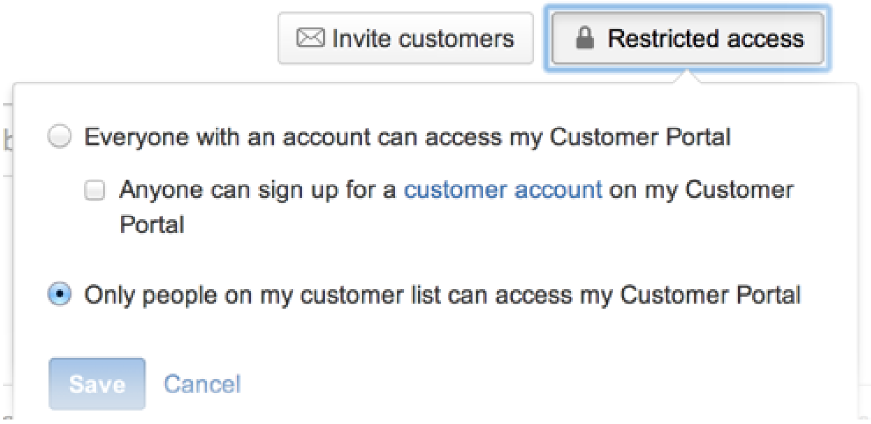
While you set up your service desk project, one aspect to consider is accessibility, or who can access your service desk and create requests. Depending on whom your team is servicing, you can open your service desk up to everyone or restrict it to a specific list of customers.

> **Note**
> This page applies to **the version 2 license**.
>
> All purchases of JIRA Service Desk made on and after 10 September 2014 are on the version 2 license, i.e. the new pricing model. For instructions on user management for version 1 license, see Setting up users with the version 1.x pricing.

On this page:

Opening up or restricting access to your service desk

1. In your service desk project, go to **People** > **Customers**.
2. On the right-hand side of the page, select **Restricted access**.
3. Select the setting for your service desk as needed.



4. For restricted service desks, add your customers to your customer list so that they can create requests successfully. To do this, use the **Invite customers** button on the **Customers** page.

When to open your service desk

As an example, an IT service desk is usually open to all the employees in an organization and everyone can access it and create requests. In this **open service desk** scenario, customers can create an account on the Customer Portal or email requests to your service desk email channel to have an account created automatically. Note that your JIRA administrator must first enable public signup.

When to restrict your service desk

In comparison, for a service desk that handles contractors' leave requests, you might want to make it only available to your contractors so that the rest of your staff do not get confused about where to put in leave requests. Service desks like this one are **restricted service desks** and only customers you invite can create requests.

Setting up the email channel

Your customers can open requests and communicate with your service team by working from their familiar email box when the email channel is enabled for your service desk. Here's how it works:

This page

Related pages

- Managing the email channel
- Troubleshooting issues with the email channel

- A customer sends an email to the email account designated for your service desk.
- A new request is created based on the email. The customer receives an email notification that contains the details of the request.
- Your agent sees the issue in one of the queues and works on the issue. When customer-visible comments are added to the issue or the status of the issue is changed,

the customer receives email notifications.
- When the customer replies to email notifications, the reply is added as a comment to the issue.

Enabling the email channel for a service desk

Before you begin

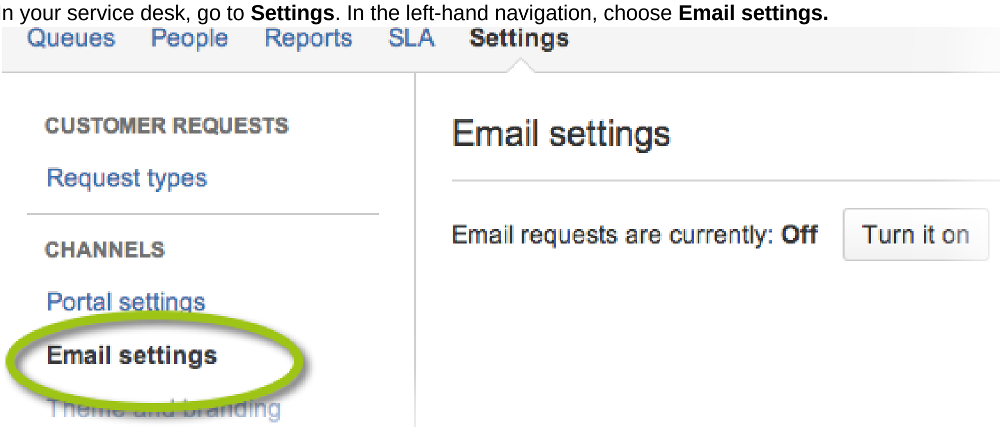
- You must be a JIRA administrator, that is you have the **JIRA Administrators** or **JIRA System Administrators** global permission.
- If your service desk does not allow public signup, add them to your customer list.
  Every customer must have an account to create requests. Email messages sent from unregistered email addresses are not processed.
- If you use POP, make sure that your inbox is empty.
  Why and how?

  To link your email account with a service desk using POP, JIRA Service Desk requires the inbox of your email account to be empty.

  Starting with an empty inbox ensures that you do not lose emails unintentionally because emails are deleted after they are pulled in by JIRA Service Desk when you use POP. To empty your inbox, you can move the existing messages to another folder, archive them or delete them.

  If you want certain messages in your inbox to be pulled in by JIRA Service Desk, you can move them back to your inbox after the connection is established.

To enable the email channel:

1. In your service desk, go to **Settings**. In the left-hand navigation, choose **Email settings.**


2. Click **Turn it on**.Follow the prompts to add your email account and select the default request type for requests created from the email channel. For Gmail and Yahoo Mail, you only need to enter your credentials. If you use other mail services, you will need to provide server details as well.

After the email channel is set up, JIRA Service Desk will take note of when it has connected to the email account for the first time. Any new messages sent to your inbox after that time will be pulled in as new requests or comments. Customers will receive email notifications about the details of their requests. For information about notifications, see Configuring JIRA Service Desk notifications. Mes sages that already exist in your email account are not processed.

A test email will be sent to the email account shortly, and you will see a new request created for it in one of your queues in JIRA Service Desk.

Using multiple email accounts

You can only link one email account of your own with a single service desk. If you use more than one email address to interact with your customers and want to integrate them with one service desk, you might be able to achieve this by setting up forwarding rules or aliases. What these two options can achieve is that all the email messages from your multiple email accounts will land in the email account linked with your service desk and therefore be pulled into your queues. You will need to configure the settings in your mail server.

User accounts created from email requests

When customers send an email for the first time, new user accounts are created automatically for them if your service desk allows public signup. For information about public signup, see Configuring public signup .

User accounts for service desk customers are free and do not count towards your license.

The username is their email address and they will receive an email notification about the user account. The user account is also added to the **Service Desk Customers** role of the service desk and you can find it in the customer list on the **People** tab. For information about the role and the customer list, see Setting up service desk users and Managing customers.

FAQs

How are requests created from email messages?

Click here to expand...

After the connection is established between JIRA Service Desk and your email account, JIRA Service Desk checks the inbox of your email account every minute. When seeing email message there, JIRA Service Desk will determine whether they are replies to existing requests or new requests.

- Replies will be added as comments to the matching issues.
- For new requests, JIRA Service Desk creates new issues by copying the email subject to the **Summary** field and the email content to the **Description** field.

If a request type has other required fields, JIRA Service Desk cannot fill out the request form correctly. Therefore, request types that have more required fields cannot be used as the default one for the email channel.

What request types can be used as the default assigned to requests for the email channel?

Click here to expand...

A suitable request type for the email channel must have the **Summary** field and the **Description** field as visible fields. Any other fields must be optional ones.

What happens to email messages in the linked email account?

Click here to expand...

If you use POP, email messages are deleted from your inbox once processed by JIRA Service Desk.

If you use IMAP, email messages are marked as read once processed by JIRA Service Desk.

Managing the email channel

Now that you have set up your email channel, you can control when JIRA connects to your mail server and filters relevant emails into your service desk projects. You can also view logging information directly in JIRA to check on the status of your mail server connection.

This page

Related pages

- Setting up the email channel
- Troubleshooting issues with the email channel

Managing global mail settings

There are two global mail settings - email puller and email processor - that are used only by JIRA Service Desk and do not impact any email settings you have set up for JIRA. Email puller connects to your mail servers every minute and pulls the email data into the database. Emails with attachments larger than 25MB will not be pulled. Email processor filters the emails (e.g. to remove auto-replies and spam) using information stored in the database.

You can access these settings by going to > **System** > **Global mail settings**.

Managing the email channel for multiple service desk projects

JIRA administrators can get an overview of all the service desks in the system that use the email channel and the email accounts linked with them.

1. Choose > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Email settings**.

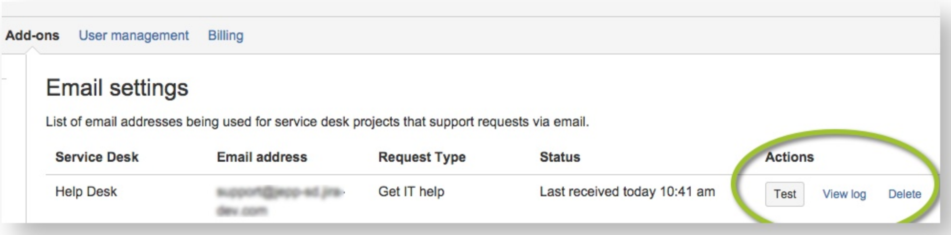
   Keyboard shortcut: **'g' + 'g' +** start typing **'email settings'**

From the **Email settings** page, you can also check the connection email processing statuses of each linked email account. Note that logging information older than 6 months is deleted daily.

1. Choose > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Email settings**.

   Keyboard shortcut: **'g' + 'g' +** start typing **'email settings'**

2. Under **Actions**, click **View log**.



3. Click the **Connectivity log** or **Processing log** tab to view the corresponding log details.

Troubleshooting issues with the email channel

This page contains information about the errors and problems that you might run into when setting up the email channel for your service desk.

Related pages

- Setting up the email channel

Checking the connection

To troubleshooting email channel issues, the first thing to do is to check the connection between JIRA Service Desk and your email account. You will see error messages that show you why the email channel does not work for your service desk.

To check the connection:

1. Choose > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Email settings**.

   Keyboard shortcut: **'g' + 'g' +** start typing **'email settings'**
2. Choose **Test**.

Resolving errors

The following table describes the common errors and provides information about how to resolve them when available.

Symptom	Description and resolution
Gmail **Error message:** `Unfortunately JIRA Service Desk couldn't connect to the mail server. Here is what the mail server said: "[ALERT] Please log in via your web browser: http://support.google.com/mail/accounts/bin/answer.py?answer=78754 (Failure)`	JIRA Service Desk checks email accounts every minute. Gmail might suspect inappropriate usage of this account and lock it for security reasons. **To resolve this:** • Create an application-specific password for JIRA Service Desk in Google Account settings. Details can be found here.
Microsoft Outlook, POP3 **Error message:** `Unfortunately JIRA Service Desk couldn't connect to the mail server. Here is what the mail server said: "STAT command failed: Exceeded the login limit for a 15 minute period. Reduce the frequency of requests to the POP3 server.`	JIRA Service Desk checks email accounts every minute. Microsoft Outlook might suspect inappropriate usage of this account and lock it for security reasons. **To resolve this:** • Use IMAP.

Gmail accounts, POP3 Requests are created from archived messages.	When JIRA Service Desk checks your email accounts for new messages, it polls the **inbox folder**. Gmail uses labels to classify messages into categories and only has these folders: **Inbox**, **Sent Mail** and **Bin** (or **Trash**). This means that the archived messages are still considered as in the inbox folder. With POP3, JIRA Service Desk is not able to identify archived messages by labels and therefore still brings them in as requests. **To resolve this:** • Use IMAP.
Customers send emails to create requests, but no requests are created and customers do not receive any notifications.	This problem could be due to one or more of the following causes: • The connection to the email account failed. • The customer does not have a user account in the system. Every customer must have an account before they can create requests. Emails sent from unregistered email accounts are not processed. • The default request type for the email channel became unsuitable for the email channel. Learn more A suitable request type for the email channel must have the **Summary** fiel d and the **Description** field as visible fields. Any other fields must be optional ones. **To troubleshoot the issue and resolve it:** 1. Check the connection as described previously on this page. 2. Check if user accounts exist for your customers. If not, create user accounts for your customers. For instructions, see Setting up service desk users.

Working on a service desk

The following information explains how to use JIRA Service Desk to work on issues, e.g. communicating with customers.

Adding people to participate in requests

Adding people to participate in requests

On this page

By default, requests are between the customer reporting an issue and the agent resolving that issue; however, we have a few different options for agents and customers who need to involve other people in their requests.

Add customers

You can include customers other than the reporter of an issue to ask them for more information or keep them updated on the issue. In JIRA Service Desk, we call these additional customers *request participants*.

Request participants can add comments and attachments to a request, and receive the same notifications from JIRA Service Desk as the reporter. Participants can easily see who else is involved in a request both on the Customer Portal and in email notifications. This makes it possible for them to work from their inbox. They can also add more participants.

> Note that involving people in a request does not bypass issue-level security. If issue-level security (e.g. restricting an issue to only be viewable by the reporter) has been applied, participants may not be able to access their requests. Service desk administrators can refer to the instructions in Configuring Issue-level Security to revise or delete an existing issue security scheme.

To add request participants on an issue:

1. Navigate to an issue.
2. In the **People** section of the issue, add users to the **Request participants** field.
   You can only add existing customers on the service desk.

If customers need to add participants via the Customer Portal, they can do so by selecting **Add people**. Service desk administrators can enable or disable this functionality. See Managing customers for more information.

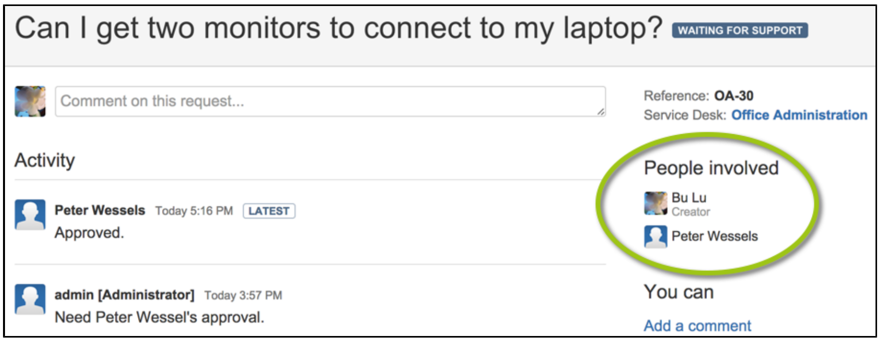
To add request participants via email:

If you are creating or responding to a request via email, add a request participant's email address to the CC field. The participant must have an existing JIRA Service Desk account to be added to the request. Note that email recipients in the TO and BCC fields will not be added as request participants.

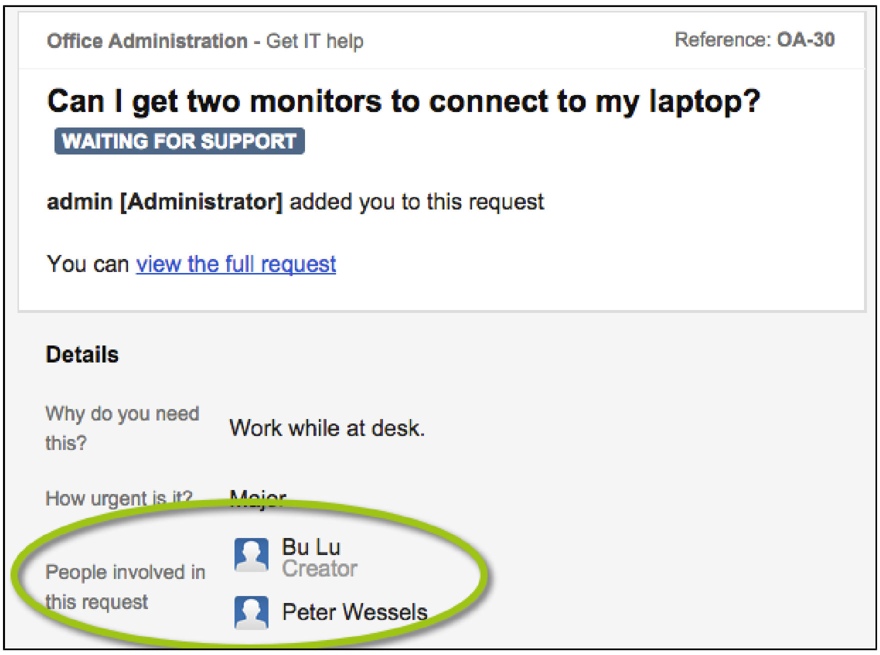
About request participants

Request participants will receive an email notifying them that they have been added. All customers, including the reporter, will appear in the **People involved** section of the request on the Customer Portal.

Screenshot: Customers see who's involved in a request on the portal in the 'People involved' section



Screenshot: Notification details showing all the participants



Add internal users

To involve internal users such as other agents or collaborators in an issue, for analyzing a bug in an application as an example, you can mention them in a comment or add them as a watcher. They will then receive a notification from JIRA about the issue and can then communicate with you internally about the issue.

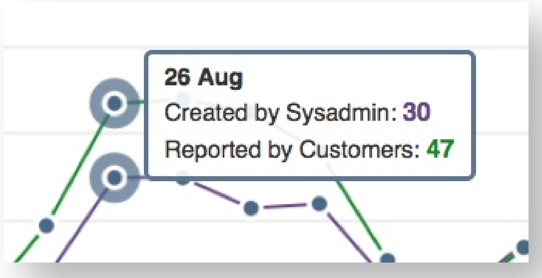
For more information, see Emailing an Issue and Watching and Voting on an Issue in the JIRA documentation.

Reports

JIRA Service Desk provides powerful realtime reporting functionality so you can see your team's performance metrics. You can also create your own custom reports to query any combination of performance data.

Your team members have access to a read-only version of the **Reports** tab so they can also see the data you're tracking.

Tip: See Reporting on SLAs for detailed information on how to run reports on SLA progress or status.



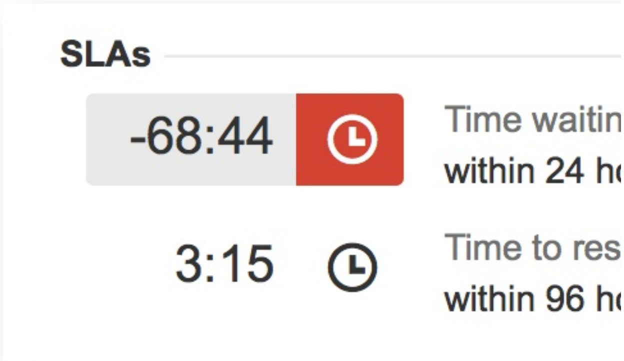
For information about the permissions needed to see and adminster reports, see How JIRA and JIRA Service Desk Work Together.

SLAs

JIRA Service Desk provides powerful built-in SLA management so you can track how well your team adhere to the agreements you have with your customers. JIRA Service Desk comes with a few pre-configured SLA metrics to cover some of the most common IT requirements; however you can modify them or create custom SLA metrics to reflect the SLAs you use in your business.

The SLA tools in JIRA Service Desk are extremely flexible; review this page for an introduction to how you can set up your service desk to track your team's unique SLA metrics:

- A look at how an SLA is constructed
- How your team sees SLAs

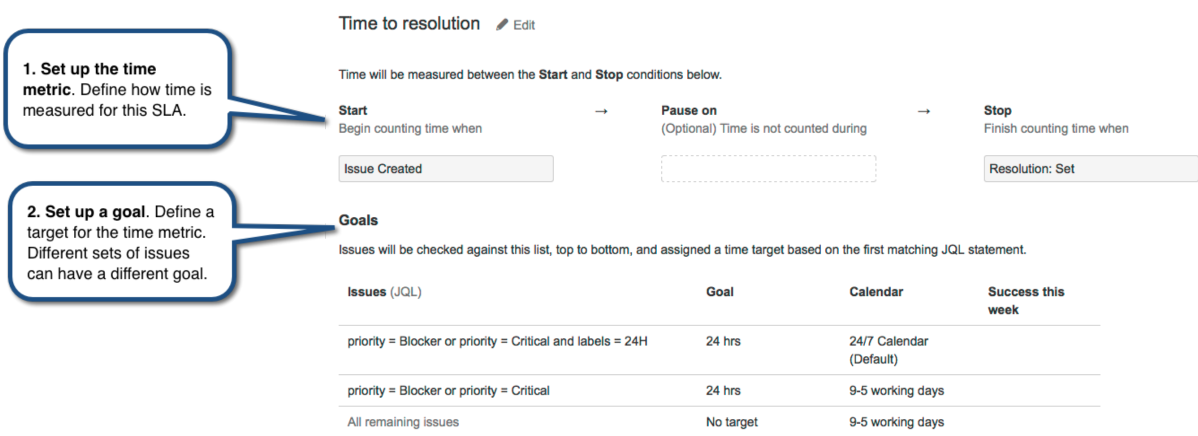


Tip: JIRA Service Desk provides robust reporting tools that you can use to track your team's performance against your SLAs. Check out this page for tips on tracking your SLAs

For information about the permissions needed to see and administer SLAs, see How JIRA and JIRA Service Desk Work Together.

A look at how an SLA is constructed

An SLA is made up of two settings: time measurement and goals for issues. Together, these criteria make up an SLA.



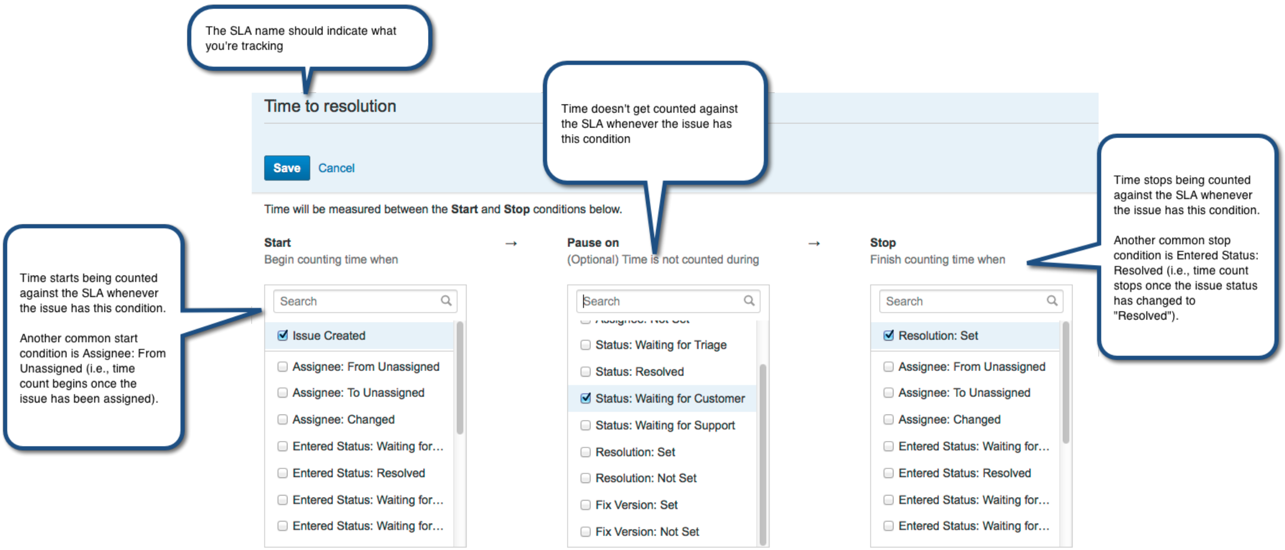
You can't change the name of an SLA after you've saved it, so make sure that the name you choose will support the SLA metric and any additional things you might need to measure in the future.

Setting up the SLA time metric

You can think of the time metric as a stopwatch that tracks time between two points in an issue's life-cycle. JIRA Service Desk lets you control exactly when time is tracked, letting you start, stop, and pause the counting based on the status of an issue or when the issue changes (for example, a comment is added). For example:

- In an SLA that guarantees issues will be resolved in a certain amount of time, the time might start counting when the issue is created and stop counting time when the issue is resolved.
- In an SLA that guarantees a certain turnaround in response times between support and the customer, the time might start counting when the issue is waiting for support. It might stop when the issue is once again waiting for the customer. Each time the issue meets the start condition, a new cycle of the SLA will begin.
- In an SLA that guarantees a certain response time excluding time spent waiting on a customer, the time might start counting when the issue is created. It might stop counting when the issue is resolved, and it will pause each time the issue is waiting for a customer.

Here's a look at how you use JIRA Service Desk SLA designer to set the conditions for the time metrics:



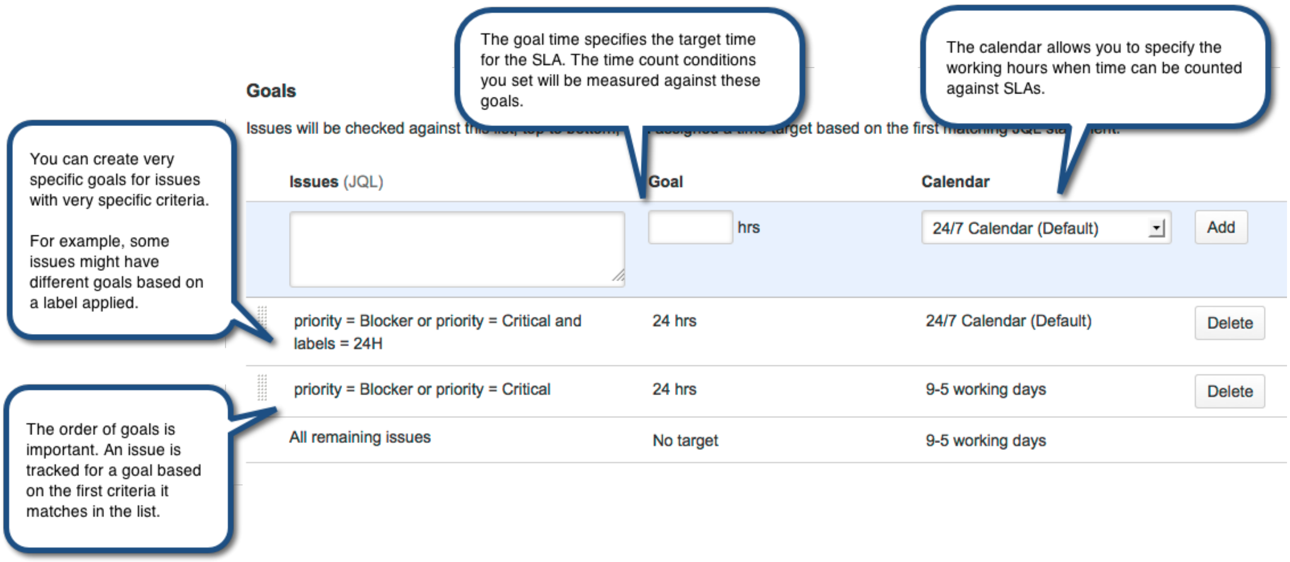
Notice that you can set multiple conditions for the start, stop, and pause time. Check out Example: Creating an SLA that doesn't track continuous time for an in-depth look at how you can use this functionality.

Set up the SLA goals

While the time conditions on an SLA specify what your team considers to be "trackable" time for the SLA, the goal section of the SLA designer lets you set the amount of time that's allowed for different scenarios. SLA goals can be in whole hours or in time increments less than an hour. For example:

- An SLA that guarantees issues will be resolved in certain amounts of time might specify Blocker issues will be resolved in 24 hours and Critical issues will be resolved in 36 hours.
- An SLA might also guarantee times for very specific issue criteria. For example, an SLA for Blocker issues might specify that Blocker issues created by a member of the Build Engineering team might have a goal of being resolved in 12 hours, while Blocker issues created by a member of the Accounting team might have a goal of being resolved in 36 hours.

Here's a look at how you use the JIRA Service Desk SLA designer to set the goals for various issues:



Tips for creating good SLA goals

- A best practice is to base a goal on criteria that doesn't change throughout an issue's lifecycle. For example, you would not create a goal based on an issue status.
- When creating SLA goals that use a fraction of an hour, write the time as Xh Ym (e.g. 3h 30m). You can write SLA goals as hours, minutes, or both (but not days).

Creating SLA Calendars

By default, SLAs are measured against 24/7 working days. However, you can use SLA calendars to specify the working hours during which time should count against the SLA target. For example, SLA calendars let you exclude holidays or weekends from the time that affects the SLA metrics.

Use the **Calendar** button on the **SLA** tab to create the calendars that work for your environment. Then associate them with SLAs as needed. See Example: Creating a basic SLA for an example of setting up an SLA that uses a 9-5 working day SLA calendar.

SLA calendars are unique to each service desk. If you want to use the same calendars in multiple service desks, you must re-create them in that project.

SLA usage notes

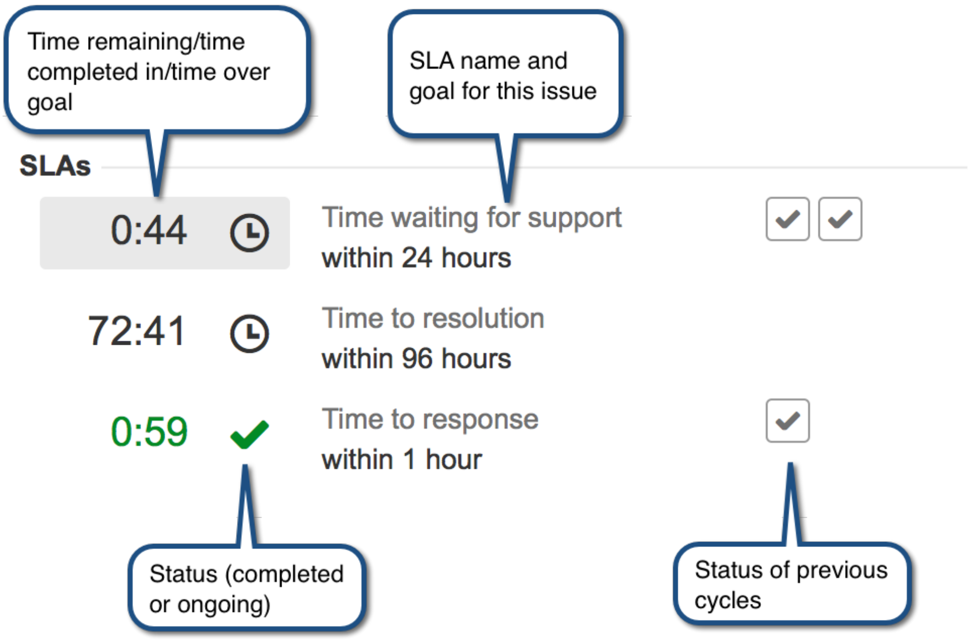
- If you edit an existing SLA, JIRA Service Desk will re-index all the existing issues in the project; the re-indexing will ensure that the SLA status on the open issues reflects any changed criteria. All the historical SLA data for elapsed time will be recalculated to measure against the new metrics. Note that the SLA status is only recalculated for open issues and not for resolved issues. For example, when the goal for Blocker issues changes from 6 hours to 4 hours, all the closed issues are still considered having met the goal as long as they were resolved in less than 6 hours. This ensures that your reports on closed issues remain accurate for the issues' lifecycle.
- If issue data changes in such a way that the goals for the issue change (for example, the priority changes from Critical to Blocker), the time against the previous goal will be tracked against the new goal. In other words, if the support team spent an hour on a Critical issue, when the issue is escalated to Blocker, the hour still counts against the new goal, even if it causes the

SLA to be breached.
- Setting up a goal to be dependent on a different SLA is not recommended.

> **Still confused?**
> The best way to understand SLAs is to look at the out-of-the box SLAs JIRA Service Desk provides, or practice making your own. Check out these detailed examples of SLAs to get an idea of the different ways you can use SLAs in your team:
> Example: Creating a basic SLA
> Example: Creating an SLA that doesn't track continuous time
> Example: Creating an SLA with multiple cycles

How your team sees SLAs

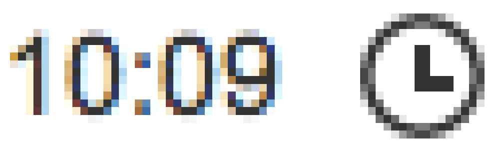
Your team members can see a read-only version of the **SLA** tab so they can view how the SLA is configured. In the detail view of issues, the **SLA** section lists even more detail about the SLA(s) that the issue is being measured against.



Review the following sections for more detail on what the SLA tracker conventions indicate.

Ongoing SLAs

The SLA tracker uses colors to indicate the urgency of a given SLA for an issue based on the time remaining.

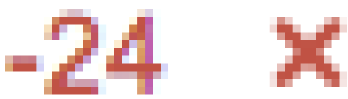
	SLA has greater than 1 hour remaining.
	SLA has less than 1 hour remaining. If the SLA goal is one hour, the SLA has 30 minutes remaining.

	SLA has less than 30 minutes remaining. If the SLA goal is one hour, the SLA has 15 minutes remaining.
	SLA has breached the target. The amount of time past the goal is shown as a negative number.

The time count may be configured to pause on certain conditions. A paused SLA will display a paused icon:

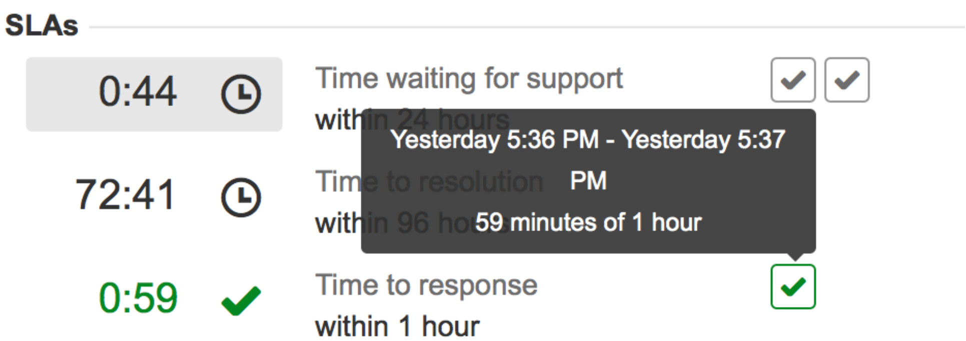
Completed SLAs

A completed SLA displays the time remaining when the SLA was completed (or the amount of time breached) and an icon to indicate whether the SLA was completed successfully or unsuccessfully.

	SLA completed successfully.
	SLA completed unsuccessfully (it breached the target)

Multiple SLA targets

If the issue meets the criteria for multiple SLAs, trackers for each SLA will appear. In addition, if the SLA has had multiple cycles, you can hover over the symbols for more details on how the SLA was met for that particular cycle. (For example, in an SLA that is measured based on when an issue is waiting for support, you can see whether the SLA was met each time the issue started waiting for support.)



SLA sorting

When you view a list of issues (in a queue or elsewhere), you can sort them by their SLA resolution times. Ongoing issues are listed first, with the shortest time remaining at the beginning of the list. Completed issues are ranked last but aren't sorted by the remaining time.

Reporting on SLAs

JIRA Service Desk provides robust reporting tools that you can use to track your team's performance against your SLAs. This page lists the SLA-specific JQL conditions you can use to query the SLA data in your service desk, as well as examples for creating some common JQL queries on SLAs.

State conditions

State conditions are JQL functions used with operators = or != . For example:

```
"Time to resolution" = breached() or "Time to resolution" != breached()
```

Success/fail functions

Function name	with =	with !=
breached()	Gives all issues whose SLA last cycle (completed or ongoing) has breached (target goal failed)	Gives all issues whose SLA last cycle has not breached (for completed) or not breached yet (for ongoing cycles)
everBreached()	Gives all issues whose SLA has any cycle (current or past) that has ever breached.	Gives all issues whose SLA has all cycles (past or present) successful or not breached yet (if ongoing).

SLA state functions

This state addresses the last SLA cycle. This cycle can be completed (the stop event is reached) or ongoing (the stop event is not reached yet). When the cycle is ongoing, the cycle can be running or paused (if pause condition is true).

SLAs that have no cycles yet (the cycle has never been started) are not returned by these conditions.

Function name	with =	with !=
completed()	Gives all issues whose SLA last cycle is completed	Gives all issues whose SLA last cycle is not completed
running()	Gives all issues whose SLA last cycle is ongoing and not paused	Gives all issues whose SLA last cycle is not running (i.e. completed or paused)
paused()	Gives all issues whose SLA last cycle is ongoing and paused	Gives all issues whose SLA last cycle is not paused (i.e. completed or running)

Duration conditions

Conditions on duration are JQL functions used with operators <, <=, >, >=.

The '=' and '!=' operators are not supported.

These functions only apply to SLAs whose last cycle is ongoing (running or paused). Completed SLAs or SLAs without cycles will not be returned.

Example:

```
"Time to resolution" < elapsed(2h) or "Time to resolution" < remaining("2h 30m")
```

There are two duration conditions:

Function name	Description
elapsed()	Gives issues whose SLA last cycle match condition on elapsed time since start event.

remaining()	This function gives issues whose SLA last cycle match condition on remaining time before SLA breaches current goal target duration.
	This function is implicit, meaning that
	`"Time to resolution" > 5h`
	is the same as
	`"Time to resolution" > remaining(5h)`

Common SLA queries

This table lists some examples of common SLA queries; the conditions you use for your own reports will vary depending on the way your JIRA project is set up.

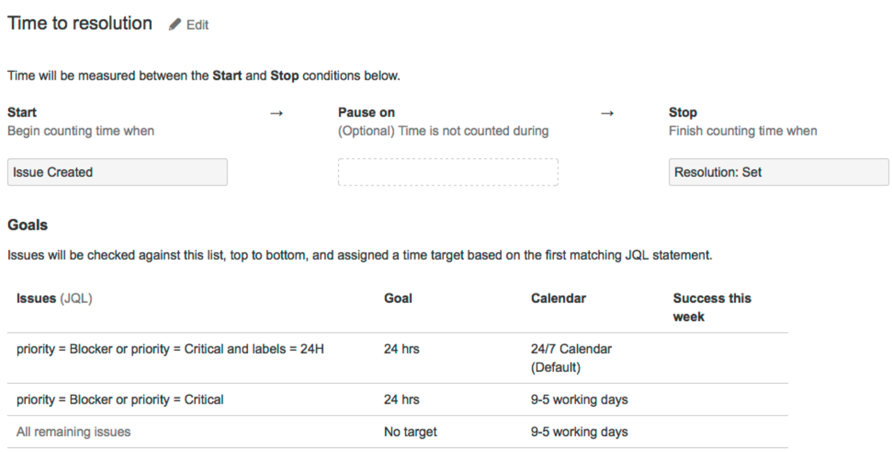
To find out	Query
All issues that are about to break SLAs	"Time to first response" < 1h and "Time to first response" != breached()
Issues that have plenty of time until they are due	"Time to first response" > 40h
Issues that have at least one breached SLA cycle	"Time to response" = everBreached()
The order of issues based on an SLA metric	project = SIS ORDER BY "Time to resolution"

Example: Creating a basic SLA

This example looks at how you might create a very basic SLA for your service desk:

All critical and blocker issues must be resolved within 24 hours. You provide 24/7 support for certain customers (these issues are labeled with "24H"). You provide 9 - 5 support for all other customers, but you don't track SLA metrics for them.

SLA configuration



(click to see a larger view)

Example issue workflow


Issue created
(Untriaged)
Waiting for
Support
Waiting for
Customer
Waiting for
Support
Waiting for
Customer

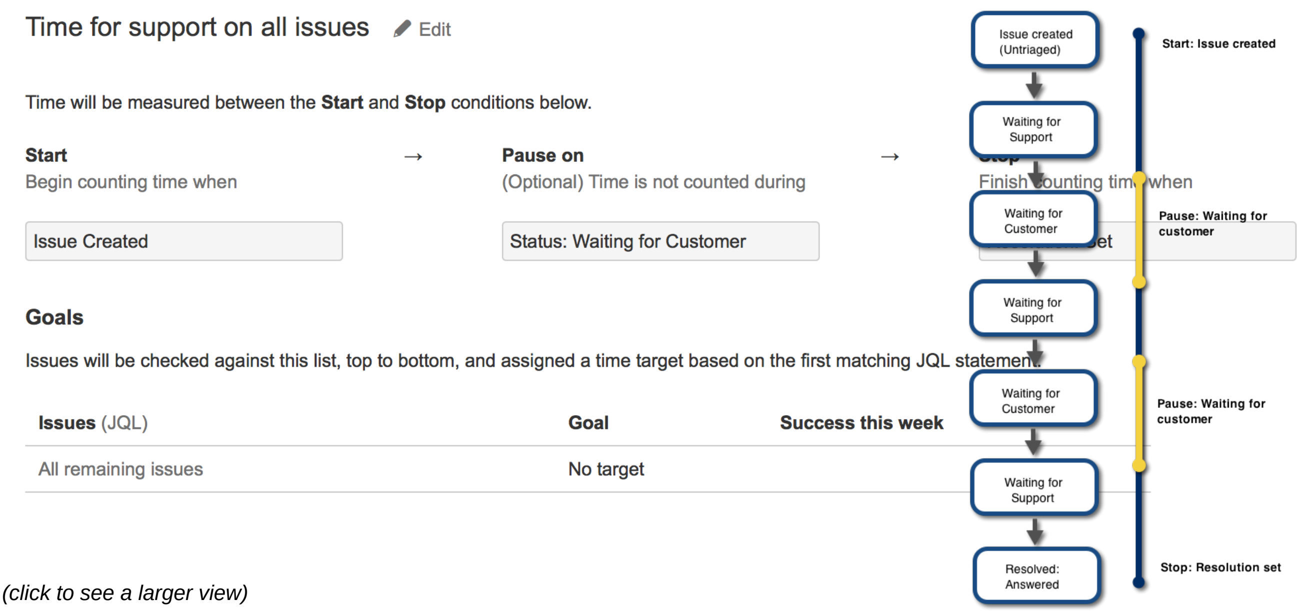
Example: Creating an SLA that doesn't track continuous time

This example looks at how you might create a more complex SLA by pausing the time counter during the workflow:

Support wants to complete all issues within 40 hours. Time spent waiting on the customer doesn't count against the 40 hour goal.

SLA configuration

Example issue workflow



(click to see a larger view)

Example: Creating an SLA with multiple cycles

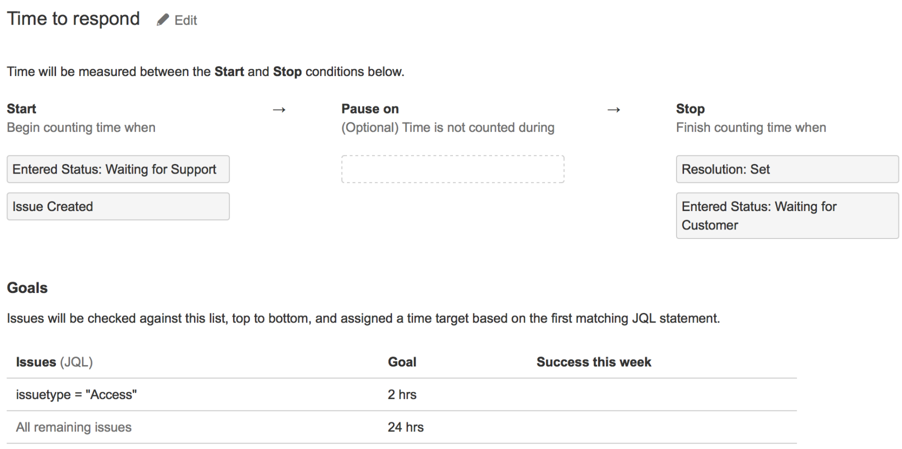
This example looks at how you might create a more complex SLA by starting and stopping the time counter throughout the workflow. You might set up an SLA like this to track response times (for example, how long it takes your team to respond each time a customer updates an issue with more information). This example also illustrates how goals for different issue criteria can be tracked from a single SLA:

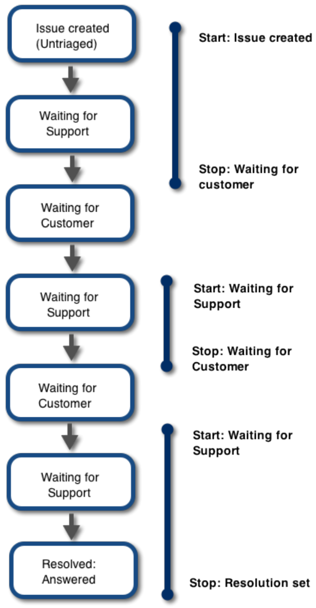
Support wants to respond to Access issues within two hours: this includes responding within two hours when the issue is created, as well as each time the issue is updated with more information from the customer.

All other issues have a response time goal of 24 hours.

SLA configuration

Example issue workflow





(click to see a larger view)

Tip: For a look at how SLAs with multiple start and stop conditions appear in the SLA tracker, see SLAs.

Managing SLA data

When new SLA metric names are created, new custom fields are created in JIRA to store them. The type of these custom fields is SLA CustomField Type. As a JIRA administrator, you have the following options to manage the SLA custom fields.

Learn more about JIRA custom fields.

Related pages

- SLAs

1. Set whether project administrators can create new SLA metric names

New metric names create new custom fields. You can restrict the creation of them to only be available for JIRA administrators.

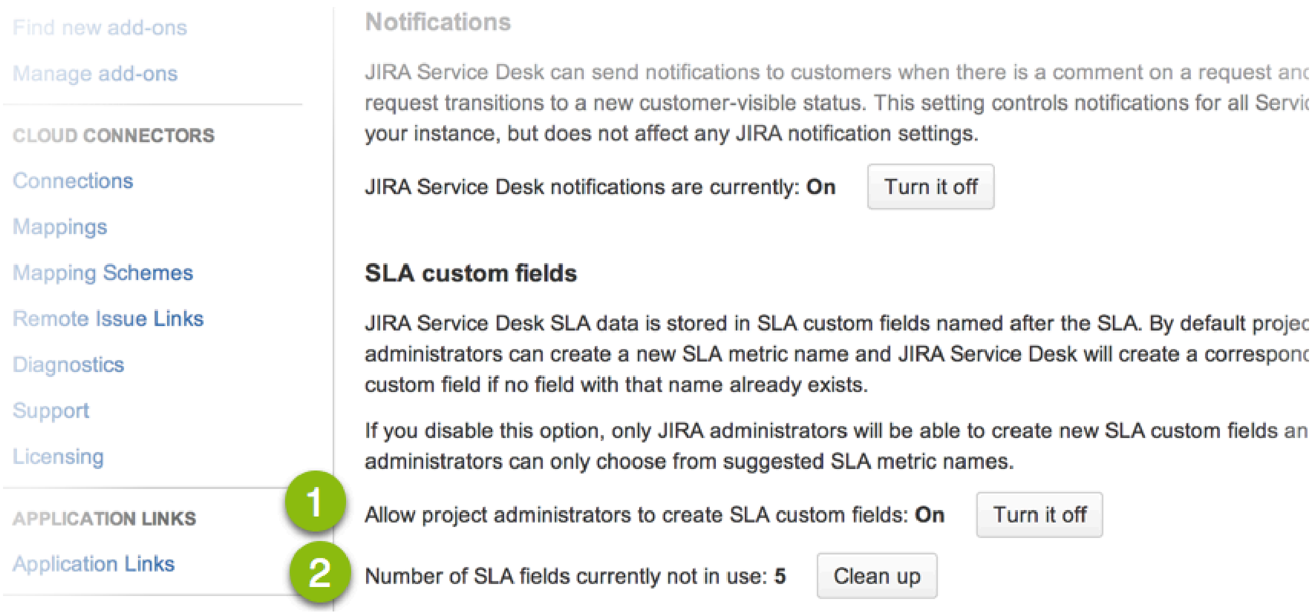
1. Choose > **Add-ons**. Scroll down to the **JIRA Service Desk** section and choose **Configuration**.

   Keyboard shortcut: **'g' + 'g' +** start typing **'service desk'**
2. Use the **Allow project administrators to create SLA custom fields** option. If the setting is disabled, service desk administrators can only select from existing metric names when creating SLAs.

2. Clean up unused custom fields

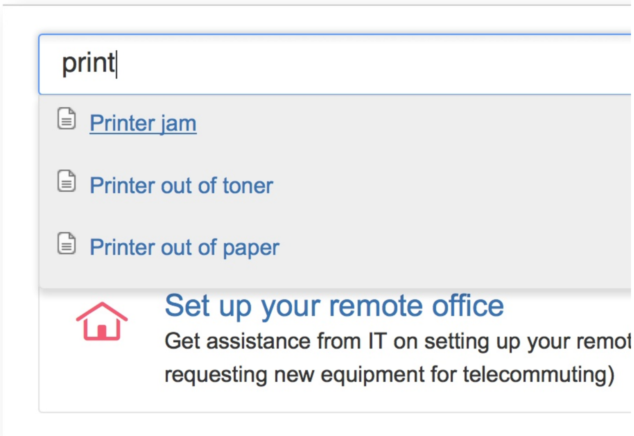
You can find out if there are SLA custom fields that are not used by any SLA metrics and clean them up with one simple click.

On the configuration page, the **Number of SLA fields currently not in use** menu shows the number of unused custom fields if any. To delete them, click the **Clean up** button.



Providing self-help resources for your customers with a knowledge base

If you use Confluence, you can integrate its knowledge base capabilities with JIRA Service Desk to help customers find solutions on their own.

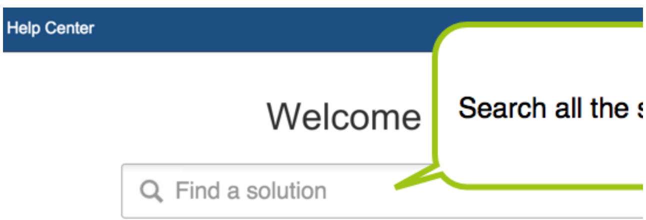


To integrate Confluence with JIRA Service Desk, go to the **Settin gs** tab and then **Knowledge Base**.

- Search on the global portal
- Restricting the topic search
- Creating knowledge base topics from an issue
- Integrating JIRA Service Desk with Confluence
    - Notes on setting up a 2-legged OAuth application link
    - About 2-Legged OAuth (2LO)
    - How to choose the user that you want searches to be performed as
- Troubleshooting issues with 2-Legged OAuth

Search on the global portal

A search box appears on the landing page if you've connected Confluence with any service desk. Your customers can easily search for anything they need to find out across all the spaces of Confluence. If multiple Confluence servers are connected to service desks, only the primary one will be used by the search box on the landing page.



Restricting the topic search

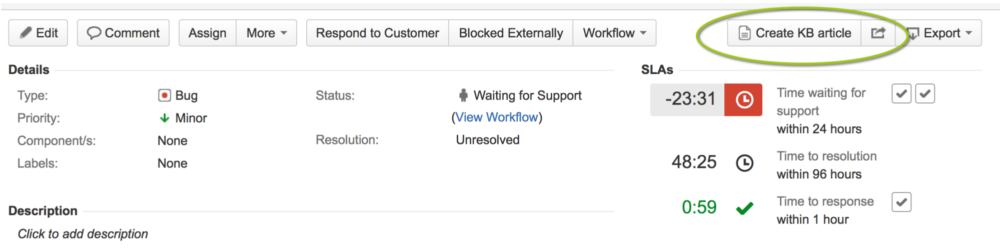
You can control how Confluence suggests topics for each request type using the **Request form search** section. You can control this in two ways:

- **Prevent Confluence from suggesting pages** - Select **No** in the **Search KB** column for the request type. For example, you

might not want the "Get access to a system" request type to suggest pages since users have to request access through the Customer Portal.
- **Limit the pages that will be suggested** - In the **Restrict to articles with label** column, enter the labels that must be applied to pages in order for them to appear in the suggested page list. For example, you might want to only include pages with the label "purchasing" to appear when customers enter a "Request new software" request.
Tip: If you add label restrictions to a request type, these labels will also appear as the default labels for knowledge base articles created in JIRA for issues based on that request type.

Creating knowledge base topics from an issue

If you link a Confluence space with a service desk, your team can create a knowledge base article based on an issue from the view issue page in JIRA. Service team members can choose whether to create the article with a How-To article or Troubleshooting article blueprint; those blueprints can help your knowledge base expand with cleanly organized topics.



The issue title and description are automatically added to the new Confluence page as its title and body text. (Any images in the issue aren't copied over to Confluence.) If you've set up label restrictions on the request type the issue was based on, those labels are automatically suggested for the article.

Service desk members must have the Add page permission in the Confluence space to create a knowledge base article from an issue in JIRA.

Integrating JIRA Service Desk with Confluence

- You can connect JIRA Service Desk with Confluence 5.6 or later.
- If you use an installed version of JIRA and Confluence, they must be linked via an application link using OAuth.
- You must have permission to view a space in Confluence in order to select it as your knowledge base. If you don't have this permission, check with your Confluence administrator.
- In order to use the topic search from the Customer Portal, customers must be Confluence users with permission to view the space the or Confluence space must allow anonymous access.
  - If the Confluence space is set up to allow anonymous viewing, any user can search the service desk when they're putting in requests (in other words, they don't have to be Confluence users).
  - However, if the space viewing is restricted to certain users, customers must have the same username in Confluence in order to search the space from the service desk.

Notes on setting up a 2-legged OAuth application link

An application link lets two applications ask each other for data. One application consumes data from another application that produces data.

For JIRA Service Desk, the application that consumes data is JIRA and the application that produces data is Confluence. When configuring the application link for JIRA Service Desk, the incoming authentication tab inside Confluence must be correctly configured.

When configuring 2-Legged OAuth, it is important to understand that the two applications actually maintain independent sets of configuration information. The configuration in the incoming authentication tab of the application that produces data is different the configuration in outgoing authentication of the application that consumes data

- Confluence needs to correctly configure either "Allow user impersonation through 2-Legged OAuth" or specify a user in "Execute as" in the incoming authentication tab.
- JIRA only needs to enable 2-Legged OAuth on the outgoing configuration tab.

About 2-Legged OAuth (2LO)

Application links that use 2-Legged OAuth accomplish this communication in one of two ways. One way to handle this communication is to trust all requests made over the application link and grant those requests access to everything. The second way to have requests made over the application link is to pretend that each request is being made by an actual user. That pretend user is used to determine what permissions should be applied to the request. The user the application link picks depends on how the application link is configured. JIRA Service Desk uses the second way when making requests between applications.

- To enable a 2LO application link you need to enable OAuth and select "Allow 2-Legged OAuth" in both incoming authentication in Confluence and the outgoing authentication in JIRA.

- When you select 2LO, make sure that you also specify the user that is used by the application link when making requests.

How to choose the user that you want searches to be performed as

- If your applications have the same users and you would like 2-Legged OAuth to pretend your users are making the request as themselves: In the incoming authentication tab of the application that will serve the data, select "Allow user impersonation through 2-Legged OAuth". This must be checked in the incoming authentication tab of the application that will serve the data as it can only be configure by that application. Your users must have the same usernames in JIRA and Confluence.
- If your users do not have the same usernames in JIRA and Confluence, you can create a special user with correct permissions: In the incoming authentication tab of the application that will serve the data, add the user name you want to use in the text field beside "Execute as" to have all searches made over the link be performed as though that user made the request. The user name must be entered in the text field beside "Execute as" in the incoming authentication tab of the application that will serve the data as it can only be configure by that application.
  Note: This setting only opens up the search restrictions for users who do not have the permission to view the space. When they open the Confluence pages by clicking the search results, they still do not get to see the pages due to the lack of the permission.
- If you want to retrieve data that is available to anonymous users, do not select “Allow user impersonation through 2-Legged OAuth” and do not add a user name in the text field beside “Exectue as”. The user that 2-Legged OAuth uses, in this case, is the anonymous user.

Troubleshooting issues with 2-Legged OAuth

You might see the following errors when connecting JIRA Service Desk to a Confluence knowledge base:

```
There was an error contacting Confluence. A possible cause of this could be an invalid
Application Link. Another possible cause could be that the current user does not have
access to Confluence. Please check that a valid Application Link to Confluence is set up
and that you have access to Confluence and have the appropriate permissions for this
action.
```

or

```
Client must be authenticated to access this resource.
```

These errors occur when the application link attempts to make a request in Confluence as a user that does not have permission to do so. In this case JIRA Service Desk is attempting to make a space search in Confluence. That search is being performed by the application link as a particular user and that user does not have permission to do the search.

To resolve the errors:

Check if 2-Legged OAuth is configured correctly in Confluence

1. Open application link configuration in Confluence. You cannot make the required changes from inside JIRA when using 2-Legged OAuth.
2. Select incoming authentication.
3. Is "Allow 2-Legged OAuth" checked? If Confluence does not have 2-Legged OAuth enabled, requests made by JIRA that attempt to use 2-Legged OAuth are not processed.
4. Is "Allow user impersonation through 2-Legged OAuth" checked? In order for JIRA users to search as though they were making the search in Confluence with their Confluence user permission, you must select this setting.
5. If "Allow user impersonation through 2-Legged OAuth" is not checked. is there a user name in the text field beside "Exectue as"? When 2-Legged OAuth is enabled but "Allow user impersonation through 2-Legged OAuth" is not checked, all searches are performed as the user entered in the "Execute as" text field. If no user is specified in that field, all searches will be performed as an anonymous user.

Check if 2-Legged OAuth is enabled in JIRA

1. JIRA cannot change the settings about in Confluence but it also needs to have 2-Legged OAuth enabled.
   Open application link configuration in JIRA, and then select outgoing authentication.
   Is "Allow 2-Legged OAuth" checked? If JIRA does not have "Allow 2-Legged OAuth" checked, then 2-Legged OAuth is not configured in JIRA.
2. If the incoming authentication tab only displays a single check box "Allow 2-Legged OAuth" and no other check box it may suffer from a bug. This bug does not correctly enable 2-legged OAuth requests sent from JIRA when the application link is first created. You can properly enable 2-legged OAuth by doing the following:
   a. Uncheck "Allow 2-Legged OAuth" in the incoming authentication tab
   b. Click the "Update" button
   c. Check "Allow 2-Legged OAuth"
   d. Click the "Update" button

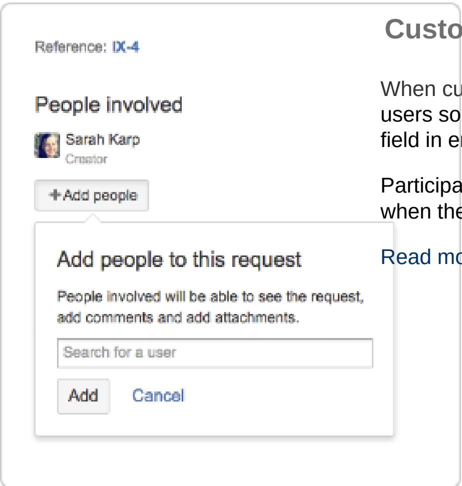
JIRA Service Desk 2.3 Release Notes

What's new

In JIRA Service Desk 2.3, customers have joined the request participant party and can now add other people to their requests. Agents also get something new: they can invite new customers to a service desk project and raise requests on behalf of new customers from the Customer Portal. Last, but certainly not least, service desk email channels are easier than ever to manage.

24 February 2015

- What's new
- Fix list
- Upgrade information



Customers can add participants to their requests

When customers are looking at a request in the Customer Portal, they can add other (existing) users so they can participate in the request too. Customers can also add participants via the CC field in email requests.

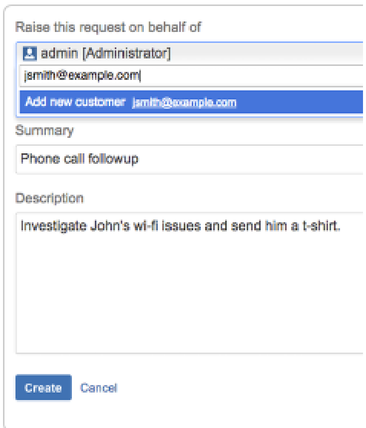
Participants (except for the request creator) can "leave" a request from the Customer Portal when they no longer want notifications about a request.

Read more...

Agents can raise requests on behalf of new customers

If you have public signup enabled, your agents can create a request on behalf of a new customer from the Customer Portal – the new customer will receive an email invitation to the Customer Portal and an email notification with a link to the new request. Agents can also invite new customers from the JIRA Service Desk **People** tab.

Read more...



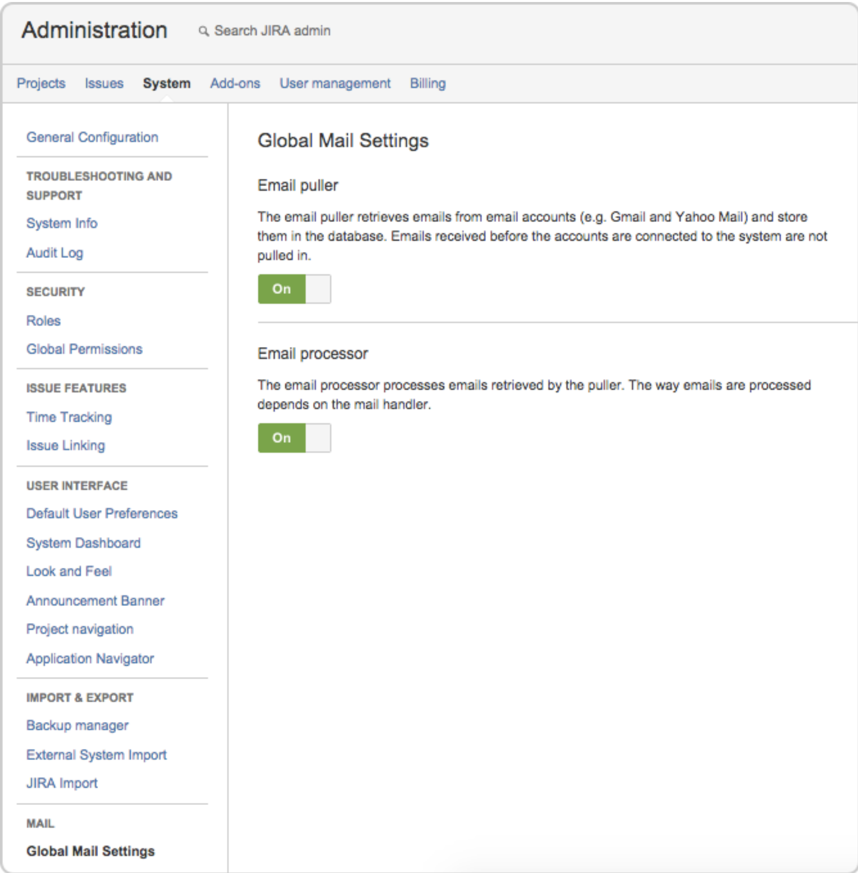
Improvements to the email channel

We've been working hard on making service desk email channels easier to use. Nothing changes for your customers and agents, but you will notice the following improvements:

- **Cleaner incoming mail page** - Information about the email accounts associated with your service desk projects has been moved from the JIRA incoming mail page to the JIRA Service Desk email settings page.
- **Better visibility into statuses** - You can now easily see the connection and email processing statuses from the corresponding connectivity and processing logs on the email settings page. Log information older than 6 months is deleted daily.

One more change you'll notice: JIRA Service Desk now processes emails in two steps, so you can enable email filtering (which can remove auto-replies and spam from your queues) without changing the connection to your linked mail servers.

Read more...



Plain text email notifications

If your customers rely on software that requires plain text or use a plain text mail client, you can now change your default setting to plain text.

Read more...

Fix list

See Issues resolved in JIRA Service Desk 2.3.

Upgrade information

JIRA Service Desk 2.3 is compatible with JIRA 6.3.8 or later. You'll need to upgrade JIRA to 6.3.8 or later before updating JIRA Service Desk to version 2.3. Before upgrading, please check End of Support Announcements for JIRA and the upgrade notes for the JIRA version you're moving to.

Issues resolved in JIRA Service Desk 2.3

Below are the issues resolved in JIRA Service Desk 2.3, ordered by number of votes. For the full details of the fixes, improvements and new features, please take a look at our issue tracker. The JIRA Service Desk 2.3 Release Notes describe the new features in this release.

Feature and fix list

Key	Summary	T	Votes
JSD-269	Allow customers to add other customers as request participants in the Customer Portal		198
JSD-546	Outgoing emails from JIRA Service Desk should support plain text format as in JIRA		8
JSD-1124	Should be possible to sign up a new customer in portal		6
JSD-1501	Customers unable to attach files when creating Service Desk Portal tickets		6
JSD-621	Conflicting pause and stop conditions prevent SLA from stopping		4
JSD-1587	Service Desk users should be able to change email notification type		3
JSD-1520	Customers do not receive issue created notifications if they have had their username changed		3
JSD-1600	Hipchat Notification is showing Created by null if username has combination of uppercase and lowercase letters.		2
JSD-1492	Internal Comment tab throws a JAVA Script error		1
JSD-1433	Add the request Participant field in the Customer Portal		1
JSD-1418	Google Apps portal login redirect broken in IE 10 & 11		0
JSD-1525	Error when creating Service Desk request with Notify Hipchat post function in Create Issue transition		0
JSD-1381	Logo as JPg cannot be uploaded		0
JSD-1646	As an Administrator or Agent, I should be able to selectively enable plaintext email notifications for Customers		0
JSD-1356	Custom field default values aren't applied to optional field in email submission		0
JSD-1799	Show primary key in the Customer Portal		0

Authenticate to retrieve your issues

16 issues

JIRA Service Desk 2.3.2 Release Notes

Fix list - 2.3.2 - 2 March 2015

Key	Summary	T	Votes
JSD-1582	System add-ons disabled after restart of JIRA		2
JSD-970	Service desk sometimes treats Connect addon users as external customers		2
JSD-1493	JIRA ServiceDesk: Problem with finiding my Confluence Space while linking to ServiceDesk		1
JSD-1459	Columns missing on service desk queue due to hidden fields on selected columns		0

Authenticate to retrieve your issues

4 issues

JIRA Service Desk 2.3.3 Release Notes

Fix list - 2.3.3 - 9 March 2015

Key	Summary	T	Votes
JSD-1408	Attachment Links in the Email is not Accessible		2
JSD-646	Issues are not transitioning when commenting via email		2
JSD-1490	Drop-down box remains visible after clicking the back button		1
JSD-1457	Missing translation variable replacement in comment		0

Authenticate to retrieve your issues

4 issues

JIRA Service Desk 2.3.4 Release Notes

Fix list - 2.3.4 - 23 March 2015

Key	Summary	T	Votes
JSD-1491	Service Desk should recognise it's being included in an Email Thread		17
JSD-99	Customer portal doesn't honor translated statuses of the issue		7
JSD-544	Add links to previous comments		1
JSD-846	If an agent Reopens an issue customer portal shows issue as closed		1
JSD-1516	Portal shows None option for single select list when it is required and has a default value		1
JSD-558	Submitting an issue through service desk when 'Customer Issue Type' field is hidden should not be allowed		1
JSD-1550	Add People option is case sensitive when search is disabled		1
JSD-1655	Unable to Add Requests Participants when Search is Disabled and E-mail Contains Uppercase Letters		1
JSD-1576	Commenting on issue (without transitioning) changes the color of issue Status in Customer portal		0
JSD-772	Request names with apostrophe creates links that are not encoded		0
JSD-1623	The time of Date Time Picker is not working well when raising requests		0

Authenticate to retrieve your issues

11 issues

JIRA Service Desk 2.3.5 Release Notes

Fix list - 2.3.5 - 7 April 2015

Key	Summary	T	Votes

JSD-1333	Error adding attachment with non-english characters sent via email		9
JSD-967	Service Desk does not respect JIRA password policy.		8
JSD-620	Emoticons are not showing on Customer Portal		5
JSD-1507	Anonymous comment in a ticket causes error rendering ActivityModule in Issue Navigator		1
JSD-1685	Issue creation via email failed if email subject exceeds 255 characters		1
JSD-1682	Create issue mail suggest customers can reply to the mail even when mail isn't setup.		0
JSD-1395	JSD does not support the reuse of labels in a new type label custom field		0
JSD-1639	Multiple User Picker field would not accept Username contain space		0

Authenticate to retrieve your issues

8 issues

JIRA Service Desk 2.3.6 Release Notes

Fix list - 2.3.6 - 21 April 2015

Key	Summary	T	Votes
JSD-1747	JIRA Service Desk plugin upgrades reset the Message Threshold limit in the Advanced mail loop detection configuration		0
JSD-766	If user dismisses the kb suggestions box in portal, it never shows again, even for new requests.		0

Authenticate to retrieve your issues

2 issues

Best practices

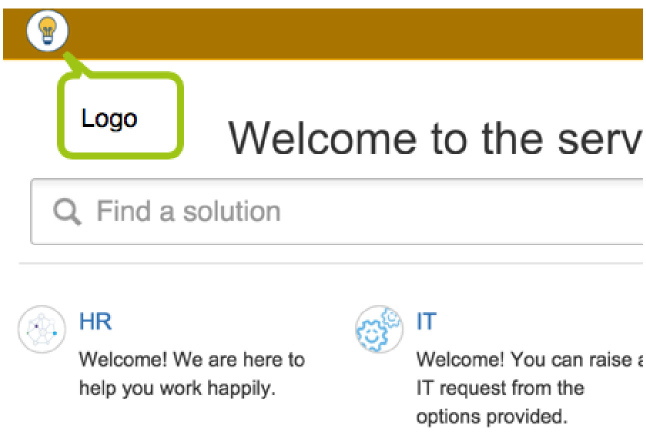
Best practices for designing the Customer Portal

Your Customer Portal is where your customers interact with your service team. Here's some best practices on how to design an easy-to-use Customer Portal that helps both your team and your customers work more efficiently.

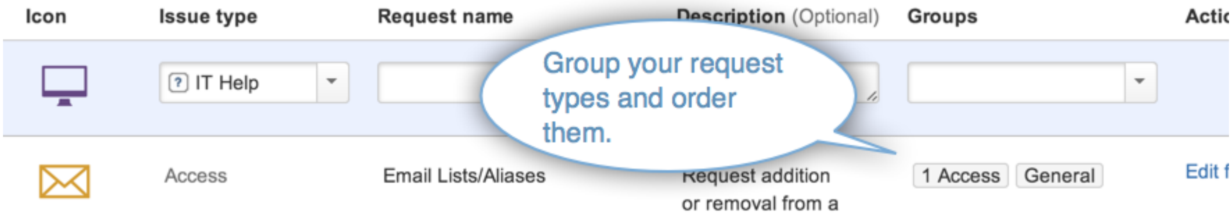
Best practices for designing the Customer Portal

Your Customer Portal is where your customers interact with your service team. Here's some best practices on how to design an easy-to-use Customer Portal that helps both your team and your customers work more efficiently.

- **Brand your Customer Portal** with your company's color scheme and logo. This is very easy: the color scheme for your service desk will automatically match that of your logo once your logo is uploaded. Wondering how? See Branding your Customer Portal.
- **Name your request types in your customers' languages**, i.e. using the keywords customers will be looking for. For example, 'Access to a system' instead of 'VPN access'.

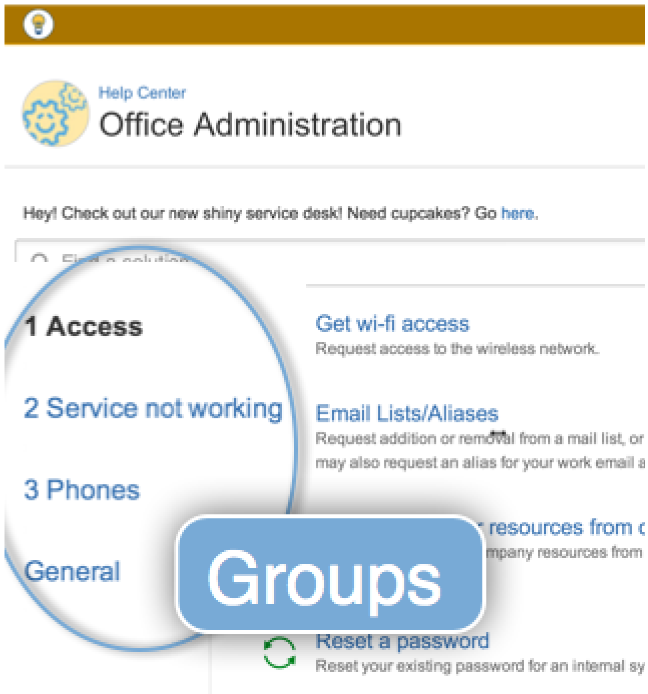


- **Help customers decide which request type to choose.** How?
    - Use different icons for different request types. This is especially helpful for customers who come back to open the same request types again as the icons stand out for them and they can easily spot the ones they are looking for.
    - Give examples and help text, e.g. for 'Software Request', you can add a description of 'If you need a software license, e.g. Microsoft Office, raise a request here.'
    - You can also provide links to existing information that might be helpful for customers. For example, if you have already purchased a number of licenses for Microsoft Office and listed the license numbers on your Intranet, you can add a link to the page in the request type description and tell your customers to head straight to it to claim a license without opening a request.
- **Keep the list of request types above the fold.** If you have a large number of request types, e.g. more than 7, customers will probably need to scroll to get to some of them. In this case, consider grouping some request types together. To set up groups, use the **Groups** drop-down and type the group names.

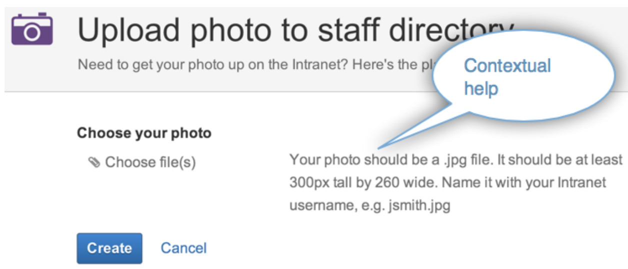


- **Order the request types and request groups.** As the number of requests increases, you might see the trend in the types of requests that get created. You can analyze the trend and tweak the order in which request types are displayed so that the popular ones appear at the top.
    - Drag and drop request types to re-arrange them on your Customer Portal.
    - Groups are displayed in the alphabetical order. To display them in a certain order, just prefix group names with numbers, e.g. *1 Access, 2 Service not working*.
    - If you assign multiple groups to a single request type, the request type will appear on multiple tabs.

Groups appear as tabs in the left-hand side of the Customer Portal



- **For each field on the request form, add contextual help**. Help provided in context makes it easy for your customers to complete the form. For example, specify the dimension and the format of the photo for the attachment field as shown in the screenshot. Add your contextual help with the **Field help** field.



- **Set up a knowledge base.** After using your service desk for a while, your team will probably have accumulated a large amount of information that could be provided to your customers so that they can solve some problems before even opening service requests. At this point, you can consider integrating Confluence's knowledge base capabilities with JIRA Service Desk. For information about how to achieve this, see Providing self-help resources for your customers with a knowledge base.

Try JIRA Service Desk »

Reference

JIRA Service Desk licensing

This page explains the type of licenses the different users need to use JIRA Service Desk.

If you want to find out the cost of running JIRA Service Desk, head over to the pricing page: https://www.atlassian.com/software/jira/service-desk/pricing.

On this page:

What license do users need

Users	JIRA Service Desk license	JIRA user license	Information
Customers	No	No	Your customers can submit requests with the Customer Portal once logged in. They can also create requests by sending emails to your inbox if you enable the email channel. They do not count towards your JIRA Service Desk license or JIRA license.
• Agents • Service desk administrators	Yes	Yes	Agents are users that work on customer requests and communicate with customers. Service desk administrators are agents with administrative privileges. When you add a new agent to JIRA Service Desk, the new agent is added to the **service-desk-agents** group automatically. By default, this group is assigned with the **JIRA Service Desk agent access** global permission and therefore counts towards your JIRA Service Desk license.
Collaborators	No	Yes	If you have other users who help your service team resolving tickets and do not communicate with your customers directly, you can purchase JIRA user license seats for them. These users are **collaborators** in JIRA Service Desk. For example, you can purchase JIRA user license seats for managers who approve purchase requests, or developers who help support staff analyze bugs.

How are users counted towards your JIRA Service Desk license - the technical details

JIRA Service Desk pricing is based on agents. Agents are users that work on customer requests and communicate with customers. Technically, an agent is any user account in the system with the **JIRA Service Desk agent access** global permission. Users must have this global permission to use the licensed functions of JIRA Service Desk. By default, the *service-desk-agents* group is granted with this global permission and all agents belong to this group. This means that any user in the group counts towards your license.

If you grant the **JIRA Service Desk agent access** global permission to other groups, users in those groups count towards your JIRA Service Desk too.

Resolving licensing issues

The number of agents exceeds your license seats

If you are experiencing this problem, you might have downgraded your license to a user tier that has fewer license seats than your agents. When this happens, your customers can still raise requests, but other JIRA Service Desk functionality will be disabled. This means that agents can only view issues and make internal comments, and they cannot perform other actions on issues any more, e.g. responding to customers. You have two options in this situation:

- Increase your license seats
- Reduce the number of agents by revoking agent licenses from some agents

JIRA Service Desk - JIRA Configuration

Database tables

When you install the JIRA Service Desk add-on into your JIRA instance, the following additional tables will be created in your JIRA database.

- AO_54307E_CAPABILITY
- AO_54307E_CONFLUENCE
- AO_54307E_CONFLUENCEKB
- AO_54307E_CONFLUENCEKBENABLED
- AO_54307E_CONFLUENCEKBLABELS
- AO_54307E_CUSTOMTHEME
- AO_54307E_EMAILSETTINGS
- AO_54307E_GOAL
- AO_54307E_GROUP
- AO_54307E_GROUPTOREQUESTTYPE
- AO_54307E_IMAGES
- AO_54307E_METRICCONDITION
- AO_54307E_QUEUE
- AO_54307E_QUEUECOLUMN
- AO_54307E_REPORT
- AO_54307E_SERIES
- AO_54307E_SERVICEDESK
- AO_54307E_STATUSMAPPING
- AO_54307E_TIMEMETRIC
- AO_54307E_VIEWPORT
- AO_54307E_VIEWPORTFIELD
- AO_54307E_VIEWPORTVALUE
- AO_54307E_VIEWPORTFIELDVALUE
- AO_54307E_VIEWPORTFORM

On this page

Custom fields

If required, JIRA Service Desk will create the following JIRA custom field:

Custom field	Type	Notes
Customer Request Type	String value	Issues must have this field to be a JIRA Service Desk request. Otherwise, they are regular JIRA issues.
Time to resolution	An SLA field, stored in JSON format.	This field stores SLA information for time until a request's resolution is set. See SLAs for more information.
Request participants	List of user keys	This field stores the list of request participants in each issue. See Adding people to participate in requests for more information.

When you create new time metrics for SLAs, JIRA Service Desk will create a custom field with the same name as the metric name. It will store SLA information in the same format as the **Time to resolution** custom field mentioned above.

Issue types and issue type scheme

At installation time, JIRA Service Desk creates the following JIRA issue types in JIRA.

- **IT Help**
- **Purchase**
- **Change**
- **Fault**
- **Access**

When you create a service desk project, a new issue type scheme with these five issue types will be created for the project. The scheme is named **JIRA Service Desk Issue Type Scheme for Project <PROJECT KEY>** .

Request types

New service desk projects come with 2 request types set up:

Request name	JIRA issue type	Description
Get IT Help	IT Help	Get assistance for general IT problems and questions [example]
Request a new account	Access	Request a new account for an internal system [example]

Workflow

When you create a service desk project, JIRA Service Desk will create a default IT Support workflow for the project. The workflow is named **JIRA Service Desk IT Support Workflow generated for Project <PROJECT KEY>**. A corresponding workflow scheme is also created, named **JIRA Service Desk IT Support Workflow Scheme generated for <PROJECT KEY>**.

To learn more about how these two settings work, check workflow and workflow scheme in the JIRA documentation.

Note: An existing project being enabled as a service desk will keep its existing workflow scheme. You can change the workflow on the workflow schemes page in JIRA administration.

Default generated workflow statuses

Workflow status	Description
Waiting for Triage	The initial status when requests are created.
Waiting for Support	After requests have been triaged and each time the customer/reporter is waiting for a response.
Waiting for Customer	After an agent has actioned a request and is waiting for a response from the customer/reporter.
Resolved	When the request has been marked as resolved.

Status mappings

The workflow status names shown above are converted into customer-friendly names on the customer portal via workflow status mappings. You can configure the status mapping per request type. The 2 default request types have the following workflow status mappings:

Workflow status in JIRA	Status shown to customer (on Customer Portal and in email notifications)
Waiting for Triage	Waiting for Support
Waiting for Support	Waiting for Support
Waiting for Customer	Requester Action Needed
Resolved	Resolved

Permissions

Global permissions

JIRA Service Desk creates the **service-desk-agents** group and the **JIRA Service Desk agent access** global permission. JIRA Service Desk uses these two new settings to manage license allocation. Do not modify these two settings directly. If you want to change license allocation, use the **Manage Agents** page in the administration console. See Managing agents.

Project permissions and security types

Project permissions control the functionalities available to users in a service desk project. For information about permission setup for a service desk project, see JIRA Service Desk permissions.

JIRA Service Desk introduces a new security type named **Service Desk Customer - Portal Access**. A security type is a concept that allows restriction of users to certain permissions; examples of security types include Project Roles and Groups. **Service Desk Customer - Portal Access** is a special security type that only applies to users while they are viewing the Customer Portal. It allows customers to use the Customer Portal without giving them access to JIRA.

JIRA Service Desk permissions

JIRA Service Desk provides a standard permission scheme (JIRA Service Desk Permission scheme for [project]) that automatically gives your JIRA Service Desk users the correct permissions for the project role they are in.

For example, adding agents to your service desk will add users to the Service Desk Team role. This role gives them access to JIRA Service Desk and also allows them to work on issues.

This page introduces how the users on the **People** tab of a service desk match to project roles and the permissions they have.

On this page

Related pages

- Setting up service desk users

What permissions does each role have?

With the standard permission scheme, the different roles on your service desk have different levels of access as shown below.

Agent - JIRA Service Desk

Agents can:

- Access both the Customer Portal and the service desk interface in JIRA
- View the Customer Portal, queues, reports and SLA metrics for the service desks they have access to
- Access and edit issues in the service desks they are assigned to
- Add, edit and delete customer-facing and private comments to issues
- Manage content in the knowledge base

Customer

Customers can:

- Create requests and track their own requests
- Add public comments to their own requests
- Add attachments to their own requests

Administrator

In addition to what agents can do, administrators can also:

- Add agents, collaborators and customers to a service desk
- Remove agents, collaborators and customers agents from a service desk
- Configure request types and the Customer Portal
- Create and edit reports
- Create SLAs for measuring progress
- Connect a Confluence knowledge base to a service desk
- Configure the email channel a service desk

Collaborator

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

How are permissions associated with each role?

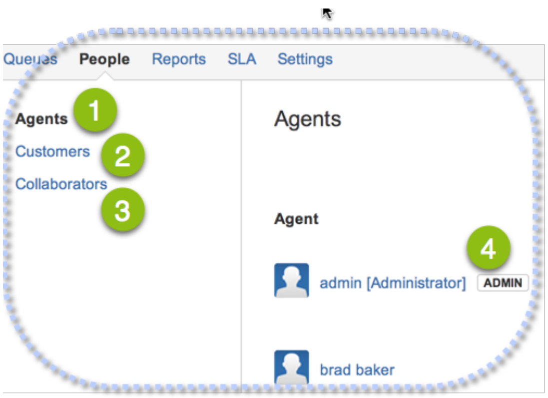
Each type of user displayed on the **People** tab of your service desk matches a JIRA project role, and the project permissions for each type of user are assigned to the JIRA project roles in the permission scheme.

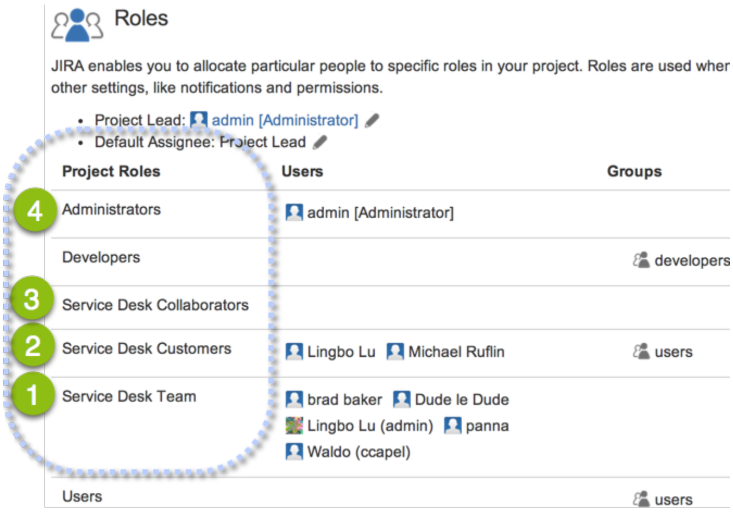
To learn about the permissions assigned to each role, see Standard permissions.

Table: User and project role mapping

User	JIRA project role
Agents	the **Service Desk Team** role
Customers	the **Service Desk Customers** role Note: The permissions to this role are granted through the **Service Desk Customer - Portal Access** security type. The security type checks this role to determine who are customers. For details about this security type, see the following section.
Collaborators	the **Service Desk Collaborators** role
Service desk administrators	the **Administrators** role

Screenshot: How the users on the People tab map to the JIRA project roles in the JIRA administration console





About the *Service Desk Customer - Portal Access* security type

The permissions assigned to customers are granted to the **Service Desk Customer - Portal Access** security type instead of the **Service Desk Customers** role. The **Service Desk Customer - Portal Access** security type gives people access to the Customer Portal only (not JIRA). This security type checks the **Service Desk Customers** role to determine who are customers. So in summary, the security type and the role work hand in hand to make sure that customers get the permissions they need to use the Customer Portal and cannot access JIRA.

For example, if you want your customers to be able to create requests through your Customer Portal, grant the **Create Issues** permission to the **Service Desk Customer - Portal Access** security type, not the **Service Desk Customers** role.

Why does the security type have more permissions than what customers can do?

In the standard permission scheme, the **Service Desk Customer - Portal Access** security type has more permissions in place than the functionality available for customers to use. For example, the security type has the **Edit Own Comments** permission, but customers cannot do this on the Customer Portal. This is because JIRA Service Desk built the functions that we think are the most commonly used by service desk customers. We will evaluate the feature requests and expand the functions gradually. With the permissions in place now, future functionality additions to the Customer Portal will be easier because you will not have to modify permission schemes to make use of new functions in most cases. You can join the discussion on new features at our issue tracker: 707 issues - Authenticate to see issue details .

Using custom permission schemes

If you want to customize the standard permission scheme, make sure that the roles have the mandatory permissions. See Using custom permission schemes.

Standard permissions

This page shows the permission configuration for a standard JIRA Service Desk permission scheme.

- To see an overview of how permissions are set up for a service desk, see JIRA Service Desk permissions.
- If you want to customize the permission scheme, make sure that the mandatory permissions are assigned to the roles. See Using custom permission schemes.
- If you run into permission-related problems, see Resolving permission scheme errors.

Project Permissions	Users / Groups / Project roles	Explanation
Administer Projects	Project Role (Administrators)	Permission to administer a project. This includes the ability to edit project role membership, project components, project versions and some project details ('Project Name', 'URL', 'Project Lead', 'Project Description').

Browse Projects	• Service Desk Customer - Portal Access • Project Role (Service Desk Collaborators) • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to browse projects, use the Issue Navigator and view individual issues (except issues that have been restricted via Issue Security). **Many other permissions are dependent on this permission**, e.g. the 'Work On Issues' permission is only effective for users who also have the 'Browse Projects' permission.
View Development Tools	• Project Role (Administrators)	Permission to view the Development panel, which displays information from Bitbucket, GitHub, Stash, FishEye, Crucible and Bamboo, if JIRA is integrated with compatible versions of these applications. For older versions of Stash and FishEye or for Subversion and CVS, this grants permission to view the related source code commits for an issue, in the 'Commits' and 'Source' tabs. Note that for CVS, to view the related source code commits, the project needs to be associated with at least one Repository.
View (Read-Only) Workflow	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to view the project's 'read-only' workflow when viewing an issue. This permission provides the 'View Workflow' link against the 'Status' field of the 'View Issue' page.
Issue Permissions	**Users / Groups / Project roles**	**Explanation**
Create Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to create issues in the project. (Note that the Create Attachments permission is required in order to create attachments.) Includes the ability to create sub-tasks (if sub-tasks are enabled).
Edit Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to edit issues (excluding the 'Due Date' field — see the Schedule Issues permission). Includes the ability to convert issues to sub-tasks and vice versa (if sub-tasks are enabled). Note that the Delete Issue permission is required in order to delete issues. The Edit Issue permission is usually given to any groups or project roles who have the Create Issue permission (perhaps the only exception to this is if you give **everyone** the ability to create issues — it may not be appropriate to give everyone the ability to edit too). Note that all edits are recorded in the Issue Change History for audit purposes.
Transition Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to transition (change) the status of an issue.
Schedule Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to schedule an issue — that is, to edit the 'Due Date' of an issue. In older versions of JIRA this also controlled the permission to view the 'Due Date' of an issue.
Move Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to move issues from one project to another, or from one workflow to another workflow within the same project. Note that a user can only move issues to a project for which they have Create Issue permission.

Assign Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to assign issues to users. Also allows autocompletion of users in the Assign Issue dropdown. (See also Assignable User permission below)
Assignable User	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to be assigned issues. (Note that this does not include the ability to assign issues; see Assign Issue permission).
Resolve Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to resolve and reopen issues. This also includes the ability to set the 'Fix For version' field for issues. Also see the Close Issues permission.
Close Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to close issues. (This permission is useful where, for example, developers resolve issues and testers close them). Also see the Resolve Issues permission.
Modify Reporter	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to modify the 'Reporter' of an issue. This allows a user to create issues 'on behalf of' someone else. This permission should generally only be granted to administrators.
Delete Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to delete issues. Think carefully about which groups or project roles you assign this permission to; usually it will only be given to administrators. Note that deleting an issue will delete all of its comments and attachments, even if the user does not have the Delete Comments or Delete Attachments permissions. However, the Delete Issues permission does not include the ability to delete individual comments or attachments.
Link Issues	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to link issues together. (Only relevant if Issue Linking is enabled).
Set Issue Security	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to set the security level on an issue to control who can access the issue. Only relevant if issue security has been enabled.
Voters & Watchers Permissions	**Users / Groups / Project Roles**	**Explanation**

View Voters and Watchers	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to view the voter list and watcher list of an issue. Also see the Manage Watcher List permission.
Manage Watcher List	• Service Desk Customer - Portal Access • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to manage (i.e. view/add/remove users to/from) the watcher list of an issue.
Comments Permissions		**Explanation**
Add Comments	• Service Desk Customer - Portal Access • Project Role (Service Desk Collaborators) • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to add comments to issues. Note that this does not include the ability to edit or delete comments.
Edit All Comments	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to edit any comments, regardless of who added them.
Edit Own Comments	• Service Desk Customer - Portal Access • Project Role (Service Desk Collaborators) • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to edit comments that were added by the user.
Delete All Comments	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to delete any comments, regardless of who added them.
Delete Own Comments	• Service Desk Customer - Portal Access • Project Role (Service Desk Collaborators) • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to delete comments that were added by the user.
Attachments Permissions	**Users / Groups / Project Roles**	**Explanation**

Create Attachments	• Service Desk Customer - Portal Access • Project Role (Service Desk Collaborators) • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to attach files to an issue. (Only relevant if attachments are enabled). Note that this does not include the ability to delete attachments.
Delete All Attachments	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to delete any attachments, regardless of who added them.
Delete Own Attachments	• Service Desk Customer - Portal Access • Project Role (Service Desk Collaborators) • Project Role (Service Desk Team) • Project Role (Administrators)	Permission to delete attachments that were added by the user.
Time Tracking Permissions	**Users / Groups / Project Roles**	**Explanation**
Work On Issues	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to log work against an issue, i.e. create a worklog entry. (Only relevant if Time Tracking is enabled).
Edit Own Worklogs	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to edit worklog entries that were added by the user. (Only relevant if Time Tracking is enabled). Also see the Work On Issues permission.
Edit All Worklogs	• Project Role (Administrators)	Permission to edit any worklog entries, regardless of who added them. (Only relevant if Time Tracking is enabled). Also see the Work On Issues permission.
Delete Own Worklogs	• Project Role (Service Desk Team) • Project Role (Administrators)	Permission to delete worklog entries that were added by the user. (Only relevant if Time Tracking is enabled). Also see the Work On Issues permission.
Delete All Worklogs	• Project Role (Administrators)	Permission to delete any worklog entries, regardless of who added them. (Only relevant if Time Tracking is enabled). Also see the Work On Issues permission.

Using custom permission schemes

If you want to customize the permission scheme for your service desk, make sure that you grant permissions to users by granting them:

- to the **Administrators** role for administrators
- to the **Service Desk Team** role for agents
- to the **Service Desk Collaborators** role for collaborators
- to the **Service Desk Customer - Portal Access** security type for customers. For more information about this security type, see JIRA Service Desk permissions.

If you grant permissions to groups or individual users instead of the roles and security type, some functionality in your service desk might be disabled.

On this page

Related pages

- Standard permissions
- Resolving permission scheme errors

Mandatory permissions by project roles

If you choose to use custom permission schemes, the permissions in the following table are mandatory for the project roles in the typical service desk context. If you configure the permissions for the roles differently than shown in the table and run into problems, you can find the explanation of the problems and how you can fix them on the Resolving permission scheme errors page.

Project role	Mandatory permissions
Administrators	This project role must have the **Administer Projects** project permission in order to set up and administer a service desk. This permission allows users to manage service desk functionality like creating new request types, setting up new queues, creating SLAs, and generating reports. This project role also must have all the permissions granted to the other users of the service desk in order to see all the functionality they'll be using.
Service Desk Team	• Create Issues (This permission gives users the ability to create issues in a Customer Portal.) • Browse Projects (This permission gives users read-only access to the **Reports**, **People**, and **SLA** tabs in a service desk project, as well as access to the project's Customer Portal. Users can also see the **Queues** tab and work on issues from within the queues.) • Edit Issues • Schedule Issues • Add Comments • Create Attachments
Service Desk Customers	The permissions for customers must be granted to the **Service Desk Customer - Portal Access** security type instead of the **Service Desk Customers** role. This configuration gives customers access to the Customer Portal only (not JIRA). The security type reads the role to determine who are customers. • Create Issues (This permission gives users the ability to create requests in a Customer Portal) • Browse Projects (This permission gives users access to the project in the Customer Portal) • Add Comments (This permission gives users the ability to add comments on their own requests.) • Create Attachments (This permission gives users the ability to add attachments when they create a request or add attachments to the request after it's been submitted) • Assign Issue (This permission is mandatory for the **Assignee** field to work. The **Assignee** field is an optional hidden field and it automatically channel issues to certain team members.) In addition, if the service desk project uses an issue security scheme, make sure that it is configured so that service desk users can view issues. Otherwise, customers might be able to create issues but not view them after they've been created.
Service Desk Collaborators	• Browse Projects (This permission gives users access to the issues in JIRA. They cannot see the service desk interface, e.g. **Queues**.) • Add Comments (This permission gives users the ability to add internal comments.) • Create Attachments

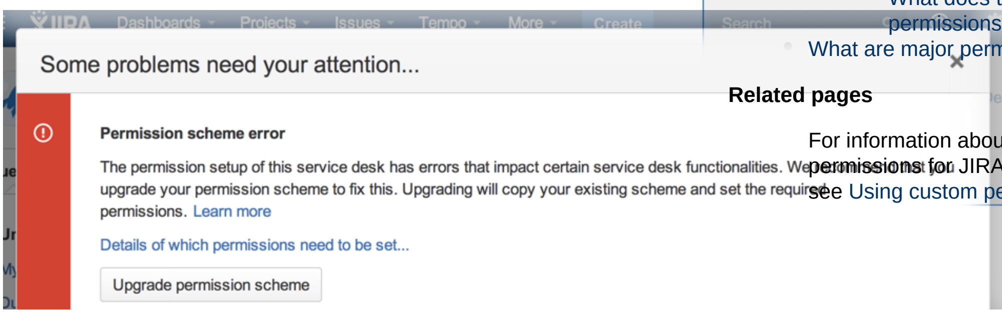
Resolving permission scheme errors

When you use a custom permission scheme, if the permission settings are different from those of the standard permission scheme, you will see a permission error similar to the following one.

On this page

Related pages

For information about mandatory permissions for JIRA Service Desk roles, see Using custom permission schemes.



Explanation of permission scheme errors

JIRA Service Desk considers the differences between your permission scheme and the standard JIRA Service Desk one as errors and there are two categories of errors:

- **Major errors:** These ones either cause certain administration functionality to be disabled (for example you cannot add agents to your service desk), or impact the day-to-day use of your service desk (for example customers cannot log in to the Customer Portal). The following table describes what JIRA Service Desk considers as major errors. You must fix these errors for JIRA Service Desk to return to normal operation.
- **Minor errors:** The permission differences that do not impact how JIRA Service Desk works are considered as minor errors. You do not have to use the standard permission setup for these permissions.

Resolving errors

You can resolve the permission errors by changing the permission scheme yourself or using the **Fix permissions** button in the error message.

What does the Fix permissions button do?

The **Fix permissions** button on the message disassociates your custom permission scheme with the service desk project, creates a copy of your permission scheme with the name of <your_permission_scheme *[number]*>, and associates this new scheme with the project. The new scheme fixes the errors by:

- Granting the standard permissions to the **Administrators**, **Service Desk Collaborators** and **Service Desk Team** roles and the **Service Desk Customer - Portal Access** security type as described on the Standard permissions page.
- Removing the **Service Desk Customers** role from all the permissions assigned.
- Leaving other permission setup as is.

Example:

Your original permission scheme	The new permission scheme
The name of the original one is 'JIRA Service Desk Permission scheme for Project OA'. The following permissions are set up differently from the standard permission scheme: • User **John Smith** has the **Browse Projects** permission. This is a minor error. • The **Service Desk Customers** role has the **Create Issues** permission. This is a major error. • The **Service Desk Customer - Portal Access** security type does not have the **Create Issues** permission. This is the major error.	After you click **Fix permissions**, the 'JIRA Service Desk Permission scheme for Project OA' permission scheme is dissociated with the project, and a new permission scheme called 'JIRA Service Desk Permission scheme for Project OA 1' will be applied to your service desk. • User **John Smith** will still have the **Browse Projects** permission. • The **Service Desk Customers** role is removed from the **Create Issues** permission. • The **Service Desk Customer - Portal Access** security type will be granted the **Create Issues** permission.

What are major permission errors?

Major permission errors cause certain functionality of JIRA Service Desk to be disabled.

Error	Explanation
The **Service Desk Team** role or the **Service Desk Collaborators** role is granted the Administer Projects permission.	Granting the Administer Projects permission to your agents or collaborators means that all agents or collaborators become administrators for your service desk. This is a severe security issue. JIRA Service Desk will disable the functionality of agent or collaborator management. As a result, administrators will not be able to add any agent or collaborator.
The **Service Desk Customers** role is granted any permission directly.	Granting permissions to this role gives customers access to JIRA functions. Customers should only have access to a Customer Portal and permissions should be granted to the **Service Desk Customer - Portal Access** security type. As a result, administrators will not be able to add any customers to the service desk. Open service desks will become restricted. Public signup will be disabled.
The **Administrators** role does not have the following required permissions: • Browse Projects • Administer Projects • Edit Issues	• No **Browse Projects** permission = Administrators cannot access the service desk. • No **Administer Projects** permission = Administrators cannot modify settings of the service desk. • No **Edit Issues** permission = Administrators cannot edit issues.

The **Service Desk Customer - Portal Access** security type does not have the following required permissions: • Browse Projects • Create Issues • Add Comments	• No **Browse Projects** permission = Customers cannot access the Customer Portal of the service desk, that is they cannot log in. • No **Create Issues** permission = Customers cannot create requests on the Customer Portal. • No **Add Comments** permission = Customers cannot add comments to their requests.
The **Service Desk Team** role does not have the following required permissions: • Browse Projects • Edit Issues	• No **Browse Projects** permission = Agents cannot see the service desk. • No **Edit Issues** permission = Agents cannot edit issues and become collaborators.
The **Service Desk Collaborators** role does not have the following required permission: • Browse Projects	No **Browse Projects** permission = Collaborators cannot see the service desk.
The **Service Desk Collaborators** role is granted the Edit Issues permission.	Collaborators should not be able to edit issues and here's why: For example, if you want to add a user as a collaborator on service desk HR and as an agent on service desk IT, granting the **Edit Issues** permission to the Service Desk Collaborators role on the HR project will make the collaborator an agent on the HR service desk instead of a collaborator.

Valiantys VertygoSLA powers JIRA Service Desk SLAs

We are happy to announce that Atlassian has acquired VertygoSLA from Valiantys. VertygoSLA is a leading add-on for JIRA in the Atlassian Marketplace that allows organisations to track their service level agreements (SLAs) for acknowledgement times or resolution times.

VertygoSLA is incorporated into JIRA Service Desk, the latest service desk offering from Atlassian. Most of the features in VertygoSLA will continue to be available in JIRA Service Desk, but redesigned with a completely new, streamlined user interface that closely integrates service level agreements with the rest of the JIRA Service Desk offering. With the power of VertygoSLA, JIRA Service Desk allows you to set up advanced SLA metrics, report on performance in real-time and drive your team forward with highly visible SLA priorities.

VertygoSLA will no longer be offered for sale separately from 2nd October 2013.

Already a VertygoSLA customer?

We have got you covered. As a valued customer of Valiantys VertygoSLA, we want to ensure that you continue to be as successful in using JIRA as you possibly can. All customers who hold an active VertygoSLA license will be eligible to obtain a *free* license for JIRA Service Desk at the same user tier as the VertygoSLA license.

To benefit from this promotion, please contact our sales team at sales@atlassian.com before the 28th Feburary 2014.

Alternatively, you can continue to use VertygoSLA. Valiantys will continue to support VertygoSLA until 2nd October 2015. All VertygoSLA customers are eligible to renew their VertygoSLA licenses through to a maximum end date of 2nd October 2015.

Frequently Asked Questions

Who is eligible for the license promotion?

If you have an active VertygoSLA license as at 2nd October 2013, you will be eligible to obtain JIRA Service Desk for free. Please contact sales@atlassian.com before 28th February 2014.

How long will the maintenance on my JIRA Service Desk license be?

The JIRA Service Desk license will have the maintenance expiry date as your current VertygoSLA license. You can renew your JIRA Service Desk license at the end of the maintenance period.

Do I need to purchase a new JIRA Service Desk license if I miss the promotion?

Yes, you will need to purchase a new JIRA Service Desk license if you do not take up the promotion before 31st December 2013.

Will VertygoSLA still work if I take up the promotion?

Yes, your current VertygoSLA installation will continue to work even if you take up this promotion.

What are the differences in the features between JIRA Service Desk and VertygoSLA?

Although JIRA Service Desk incorporates VertygoSLA, we have significantly rewritten much of the product features, which means that there are some key differences. These include:

VertygoSLA	JIRA Service Desk
VertygoSLA supports working hour calendars	~~JIRA Service Desk does not yet support working hour calendar support~~ As of JIRA Service Desk 1.1, working hour calendars are supported
Configure SLAs globally requiring administration permission on JIRA	Configure SLAs within each project, requiring project administration permission in JIRA only
VertygoSLA support negotiated start / end times for SLAs	JIRA Service Desk does not support negotiated start / end times for SLAs.
VertygoSLA metrics start, pause, and end on set of JIRA events	JIRA Service Desk metrics start, pause, and end on a subset of JIRA events, and workflow statuses
VertygoSLA metrics only record on issues created after the metrics have been created	JIRA Service Desk can retro-actively apply metrics to issues already existing in JIRA before the metrics are created.

If there are specific features that you are looking for in JIRA Service Desk that was available in VertygoSLA, we encourage you to contact our team via http://jira.atlassian.com.

Will there be a migration tool available to migrate from VertygoSLA to JIRA Service Desk?

Currently, there are no migration tools available.

Glossary

- Administrator
- Agent - JIRA Service Desk
- Collaborator
- Customer
- Customer Portal 1
- Issue - JIRA Service Desk
- Issue type
- Knowledge base
- Queue - JIRA Service Desk
- Report
- Request
- Request form
- Service-level agreement (SLA)
- SLA tracker

Administrator

Administrators are users with administrative rights for a service desk.

In addition to what agents can do, administrators can also:

- Add agents, collaborators and customers to a service desk
- Remove agents, collaborators and customers agents from a service desk
- Configure request types and the Customer Portal
- Create and edit reports
- Create SLAs for measuring progress
- Connect a Confluence knowledge base to a service desk
- Configure the email channel a service desk

Related pages

- Agent - JIRA Service Desk
- Customer
- Collaborator

An administrator consumes one JIRA Service Desk license and one JIRA license.

Agent - JIRA Service Desk

Agents are users that work on customer requests and communicate with customers.

Customers create requests and these requests appear as issues in JIRA for agents to work on.

Agents can:

- Access both the Customer Portal and the service desk interface in JIRA
- View the Customer Portal, queues, reports and SLA metrics for the service desks they have access to
- Access and edit issues in the service desks they are assigned to
- Add, edit and delete customer-facing and private comments to issues
- Manage content in the knowledge base

An agent consumes one JIRA Service Desk license and one JIRA license.

Related pages

- Managing agents
- JIRA Service Desk licensing
- Customer
- Collaborator
- Administrator

Collaborator

Collaborators are users that occasionally assist agents with customer requests by making internal comments. For example, developers help support staff analyze a bug and add a comment that explains the cause and any workaround available.

Collaborators don't have access to the service desk interface (e.g. queues, reports and SLAs) and service desk projects appear as JIRA projects to them. They cannot work on issues, for example, logging work or transitioning issues.

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

A collaborator consumes one JIRA user license.

Related pages

- Managing collaborators
- Agent - JIRA Service Desk

Customer

Customers, also known as JIRA Service Desk customers, are users who create requests for agents to work on.

Customers have access to the Customer Portal; they do not have access to the service desk interface in JIRA used by the service team.

Customers can:

- Create requests and track their own requests
- Add public comments to their own requests
- Add attachments to their own requests

Customers do not consume JIRA Service Desk licenses or JIRA user licenses.

Related pages

- Agent - JIRA Service Desk
- Collaborator
- Administrator

Customer Portal 1

The site where customers submit and track requests.

Agents, collaborators and administrators can also use the Customer Portal.

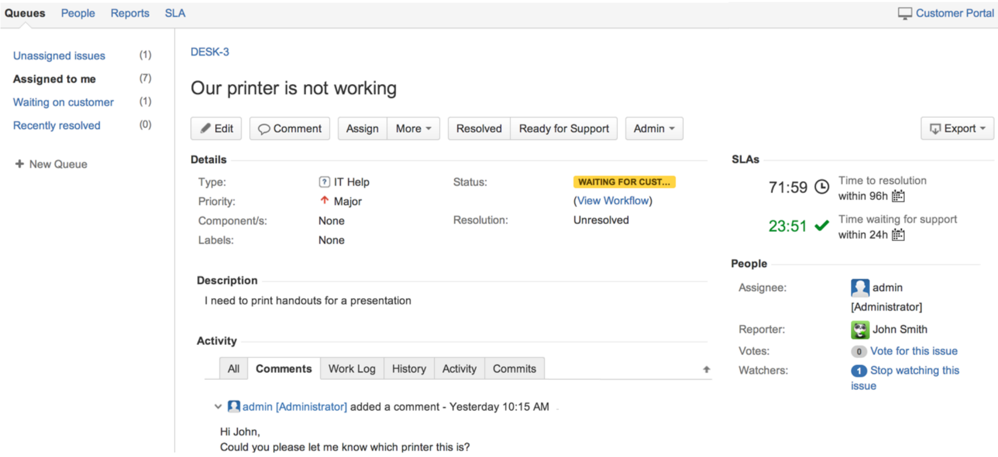
Issue - JIRA Service Desk

Customer requests are issues for the service team. An issue usually has more fields than the corresponding customer request.

When an agent works on customer requests, they use the JIRA issue view to update the requests, and all the information is recorded in the corresponding issues.

To see how issues look like for customers, see Request.

An example JIRA Service Desk issue



Issue type

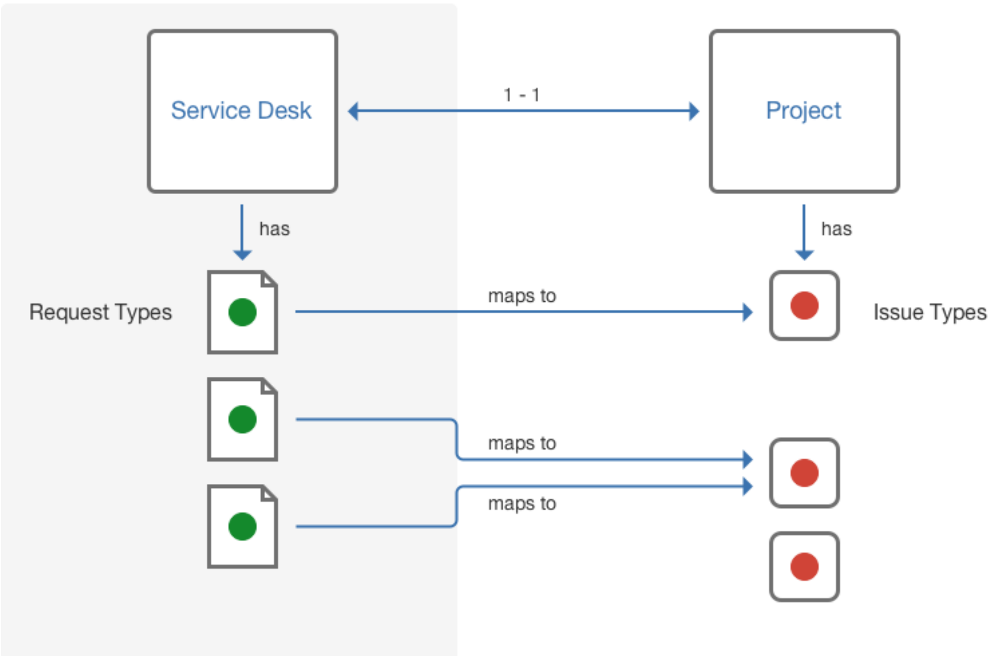
Issue types are a JIRA concept and are the underlying objects for request types.

One issue type can be the base for one or more request types.

When you customize what customers see on the Customer Portal by modifying the request types with the service desk interface, you are changing the display of JIRA fields

Related pages

- Request



Knowledge base

A knowledge base is where you provide help content for your customers so that they can find solutions on their own. You can add the knowledge base capabilities to your service desk by integrating Confluence with JIRA Service Desk.

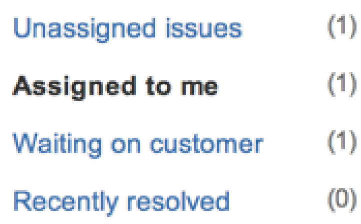
To see how you can build up knowledge and help your customers find solutions on their own, see Providing self-help resources for your customers with a knowledge base.

Queue - JIRA Service Desk

A queue is a list of issues that are displayed based on a set of criteria. JIRA Service Desk provides some pre-configured queues that sort issues for your team. You can create additional custom queues to further optimize the view for the agents.

Here's how queues work:

- Service desk administrators can create new queues.
- Agents can view queues but can't create their own custom queues or change the order the queues appear in. Keep this in mind when you design queues.
- You can control the order of issues in a queue by the way you structure the JQL statement you use to set up the queue.



Report

Reports are charts that illustrate the performance of your service desk.

A report consists of one or more series. A series plots a measurement through time and appears as a line on the chart. JIRA Service Desk provides some pre-configured reports. You can create custom reports to query any combination of performance data.

Request

Customers create requests with the Customer Portal or by sending emails to the email account that is linked with your service desk project.

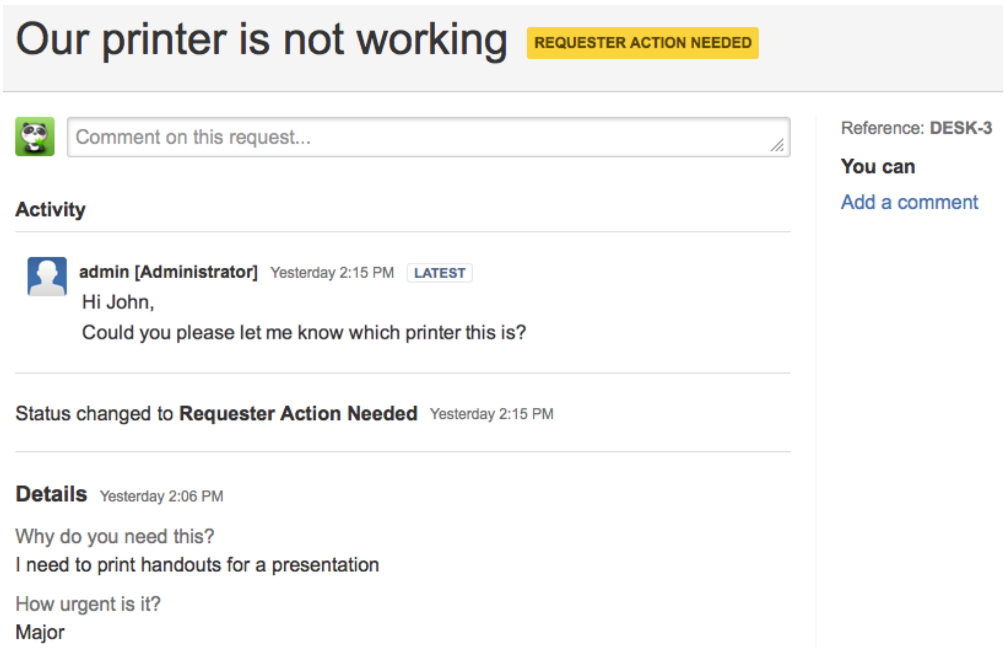
Depending on what your organizations use JIRA Service Desk for, a request might represent a support ticket, a leave request, etc..

Customers fill in the details of a request in a set of fields defined by the service desk administrator and the request is saved as an issue in JIRA Service Desk. Customers interact with agents by adding comments to the request. The status of the request is used to communicate the progress of the request. To see how a request appears for agents, see Issue - JIRA Service Desk.

Related pages

- Customer portal
- Setting up the email channel

An example request



Request form

A request form refers to the form where customers fill out the information when creating a request on the Customer Portal.

Service desk administrators define the fields available on a request form.

Service-level agreement (SLA)

See wikipedia. An SLA in JIRA Service Desk is made up of two settings: time measurement and goals for issues.

Time metrics define how time is measured and goals set the amount of time that's allowed for different scenarios.

SLA information appears on both issues and queues, so no matter where your team work, they'll be able to see if they're on track to meet their SLA goals.

Related pages

- SLAs

SLA tracker

The visual indicators on issues and queues that graphically show the SLA status.

For examples of how SLA information is presented to your agents, see SLAs.

Screenshot: SLA tracker in a queue