

Workflows

A Jira workflow is a set of [statuses](#) and [transitions](#) that an issue moves through during its lifecycle and typically represents processes within your organization.

excentia Admin Tools provides an additional set of workflow conditions, validators, and post-functions that let you do much more in your workflows.

These additional possibilities allow Jira Administrators to customize workflows, not only improving Jira capabilities, but allowing administrators to do more in less time. With literally no coding, a Jira Admin would be able to apply an extra layer of security level or improve permission management within his/her Jira instance.

Next table shows the set of conditions, validators and post-functions that **excentia Admin Tools** provides.

Conditions	Description
User is project lead	Condition to evaluate if current user is project lead
Fields required	Condition to allow the transition only if the selected field has value
Custom field value	Condition to compare a field value to a given one
JQL condition	Condition that checks if current issue is returned by a JQL

Validators	Description
Fields required	It allows admins to configure required fields in a transition
Restrict issue type on creation	Allow users in a group to create determined issue types. The validator checks users groups with the right permissions to create certain issue types. Valid for creation transition!
Comment required	Writing a comment is a requirement to execute a transition in the workflow
System time field	Compares a system time field (Original estimate, Remaining estimate, Time Spent and Time worklogged in the current transition) to a given value.
Custom field value	Compares a field value to a given value.

Post-functions	Description
Clear fields	Whilst executing a transition you can erase content from a selected field
Change Security Level	Configure the security level of the issue with the security level of the project
Copy transition comment in linked issues	Copy transition comments in the linked issues choosen (This transition should have an assigned screen in order to show comment system field)
Transition linked issues	Automatically transition linked issues with selected issue links.
Send email	Send a personalised email after a transition it's executed. More information on the User Guide
Add comment to linked issues	Choose the issue link(s) and write a comment
Create linked issues	Creates a linked issue copying the fields selected by the user in the selected project.
Assign current user to user picker field	Sets user field value to user who executes the transition
Copy issue field	Copys one field value into another field in the same issue or in a related one
Edit field value	Updates a field in current issue or in a related one with a given value

- *Note: more functionalities to come in future versions.*

Customised Workflows

Workflow: **Customer Onboarding**

Step	Description
1. Initial Contact	Initial contact via email or phone to welcome the new customer and provide basic information.
2. Account Setup	Help the customer set up their account, including creating a profile and setting preferences.
3. Product Recommendation	Based on the customer's interests, recommend relevant products or services.
4. Training Session	Offer a training session or tutorial to help the customer get started with the product.
5. Feedback Loop	Check in with the customer to see how they are doing and address any concerns.
6. Ongoing Support	Provide ongoing support and resources to help the customer succeed with the product.

Workflow: **New Hire Onboarding**

Step	Description
1. Welcome Message	Send a welcome message to the new hire, including their start date and location.
2. Paperwork Completion	Ensure the new hire completes all necessary paperwork, including tax forms and insurance.
3. IT Setup	Set up the new hire's computer, email, and other necessary technology.
4. Training Session	Provide a training session to introduce the new hire to the company's products and services.
5. Mentor Assignment	Assign a mentor to the new hire to provide guidance and support during their first days.
6. Regular Check-ins	Conduct regular check-ins with the new hire to monitor their progress and address any issues.

Workflow: **Project Management**

Step	Description
1. Project Kick-off	Hold a kick-off meeting with the project team to define the project's goals and objectives.
2. Task Assignment	Assign tasks to team members based on their strengths and availability.
3. Progress Tracking	Track the progress of the project and communicate any changes or delays to the team.
4. Regular Meetings	Hold regular meetings with the project team to discuss progress and address any issues.
5. Client Communication	Keep the client informed of the project's progress and any changes to the timeline or scope.
6. Project Completion	Finalize the project and ensure all deliverables are met to the client's satisfaction.