

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, providing a welcome message and a link to the onboarding guide.
2. Account Setup	Customer completes account setup, including email verification and password creation.
3. Profile Completion	Customer fills out their profile information, including name, address, and contact details.
4. Product Selection	Customer selects their preferred product or service from the available options.
5. Payment Method	Customer chooses a payment method and provides necessary payment details.
6. Final Review	Customer reviews their account information and confirms the setup process.
7. Welcome Email	Customer receives a final welcome email with all necessary information and a link to the user manual.

Workflow: **New Product Launch**

Step	Description
1. Product Announcement	Internal announcement of the new product to the marketing and sales teams.
2. Content Creation	Creation of marketing content, including blog posts, social media posts, and press releases.
3. Email Campaign	Launch of an email campaign targeting existing customers and potential leads.
4. Social Media Promotion	Active promotion of the new product on various social media platforms.
5. Sales Training	Training of the sales team on the new product's features and benefits.
6. Customer Feedback	Collection and analysis of customer feedback to refine the product and marketing strategy.

Workflow: **Customer Support**

Step	Description
1. Ticket Submission	Customer submits a support ticket via email or the company website.
2. Initial Assessment	Support team assesses the issue and categorizes it based on urgency and complexity.
3. Solution Search	Support team searches the knowledge base for existing solutions to the problem.
4. Customer Communication	Support team communicates with the customer to gather more details and provide updates.
5. Problem Resolution	Support team implements the solution and ensures the customer's issue is resolved.
6. Follow-up	Support team follows up with the customer to ensure the solution was effective and the customer is satisfied.